Communications Regulatory Authority
State of Qatar
هيئة تنظيم الاتصالات
دولة قطر

CRA Customer Satisfaction Survey – 2014

Report Findings

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List of Abbreviations

ARPU: Average Revenue Per User

CAPI: Computer Assisted Personal Interviewing

CRA: Communications Regulatory Authority

EMF: Electro Magnetic Fields

ICT: Information and Communication Technology

ictQATAR: Ministry of Information and Communications

ITU: International Telecom Union

IVR: Interactive Voice Response

MENA: Middle East & North Africa

MNP: Mobile Number Portability

QoS: Quality of Services

QSA: Qatar Statistics Authority

RF: Radio Frequency

RIM: Random Iterative Method

SIM: Subscriber Identity Module

SLA: Service Level Adherence

SMS: Short Message Service

SRD: Stakeholder Relationship Database

VAS: Value Added Services

List of Key Terms & Definitions

Attitudinal Loyalty: It is one of the key components of Walker Customer Loyalty framework. This indicates consumers' emotional attachment/ loyalty towards any brand/ company and its products and services offered.

Behavioral Loyalty: It is one of the key components of Walker Customer Loyalty framework. This indicates future intended consumers' behavior basis their experiences with and perceptions about any brand/ company and its products and services offered.

Confidence Level: A confidence level refers to the percentage of all possible samples that can be expected to include the true population parameter. For example, suppose all possible samples were selected from the same population, and a confidence interval were computed for each sample. A 95% confidence level implies that 95% of the confidence intervals would include the true population parameter.

Factor Analysis: Factor analysis is a statistical method used to describe variability among observed, correlated variables in terms of a potentially lower number of unobserved variables called factors. For example, it is possible that variations in four observed variables mainly reflect the variations in two unobserved variables. Factor analysis searches for such joint variations in response to unobserved latent variables.

Fibre Broadband: The latest advancement in broadband technology, fibre optic broadband enables super-fast speeds for all of daily Internet needs. Its name comes from the use of plastic or glass cables, which allow for faster data transfer compared to the standard copper wires which are used in regular broadband connections.

Likert Scale: A Likert scale is a psychometric scale commonly involved in research that employs questionnaires. It is the most widely used approach to scaling responses in survey research, such that the term is often used interchangeably with rating scale, or more accurately the Likert-type scale.

Loyalty Segmentation: Loyalty captures a customer's perceptions and attitudes about telecom services, including whether or not they intend to stay as a customer in foreseeable future. Loyalty Segmentation this is one of the key outputs from Walker Customer Loyalty framework. In this, the consumers are classified into 4 distinct groups of loyalty based on their commitment and behavior towards the service providers of telecom services.

Mobile Broadband: A mobile broadband modem, also known as a connect card or data card, is a type of modem that allows a laptop, a personal computer or a router to receive Internet access via a mobile broadband connection instead of using telephone or cable television lines.

RIM Weighting: Rim-weighting uses a mathematical algorithm to help provide an even distribution of results across the entire dataset while balancing certain categories such as age or gender to pre-determined totals. It weights the specified characteristics simultaneously and disturbs each variable as little as possible. For example, if you wished to weight your samples so that they were 50% male and

50% female, and also 20% in each of five age brackets, the algorithm would calculate the correct weighting that needed to be applied to each table entry (combining age and gender).

Walker: Walker Info (http://www.walkerinfo.com/) is the pioneer in Stakeholder Loyalty research (based in USA) for last 75 years. AMRB is the exclusive license for Walker in MENA (Middle East & North Africa) region.

Executive Summary

INTRODUCTION

The State of Qatar's unique and diverse population of around 2 million impacts consumers' opinions about telecom products and services consumed. For example, 65 percent of Qatar's population are between 25-45 years of age, 20 nationalities are represented in the population, and expats comprise 87percent of the population. Qatar has 100 percent mobile penetration and an Internet penetration of 96 percent at a household level. In addition, at 54 percent, 3G penetration in Qatar is much higher compared to the regional (MENA) average of 34 percent.

The Communications Regulatory Authority, whose mandate is to encourage and support an open and competitive communications sector that brings a broad range of advanced, innovative, and reliable service to the people of Qatar at reasonable prices, conducted a comprehensive Customer Satisfaction Survey to better help it fulfill its mission. The study, conducted in the fourth quarter of 2014, is meant to statistically measure Quality of Service (QoS) and customer satisfaction with respect to delivery of telecommunications services from their respective service providers, prices charged, and consumer rights protection.

RESEARCH BACKGROUND

CRA commissioned AMRB, LLC to conduct both qualitative and quantitative research to evaluate the performance of telecom services and make recommendations to help CRA fulfill its mission. In all, 9 focus groups with telecom consumers and 2,526 face-to-face interviews were conducted across all demographic and geographic segments. In addition, AMRB held detailed in-person discussions with key leadership within CRA and the two service providers. Some of the key objectives of this research activity were to assess consumers' awareness of CRA, their satisfaction with quality of services, market competitiveness, and consumer rights protection, among others.

Feedback from the consumers was collected through CAPI (Computer Assisted Personal Interviewing) technique and the data collected was analyzed using various statistical techniques such as regression, and factor analysis, among others. To ensure a good comparison, the data collected was benchmarked with results of consumer satisfaction across four key countries -- Singapore, UK, Australia and UAE. Furthermore, feedback from Qatar's telecom users was compared with the globally renowned Walker Stakeholder Relationship Database (SRD) - at a global and North America level.

CONSUMER FEEDBACK

The Overall Picture

With consistent increase in subscriptions, adoption of new technologies, and penchant for innovation by the service providers, the telecom sector in Qatar is one of the most progressive in the region. The three main reasons consumers in Qatar give for using communication services are the need to be connected, to procure information, and as a source of entertainment. Consumers place a much higher importance on mobile connectivity than fixed line services, perhaps a result of an increase in adoption of smart devices in the market.

Currently, around 88 percent of telecom users in the country are satisfied with the quality of services provided by their respective service providers; 12 percent are dissatisfied with the services received. Considering the various global norms, this indicates room to improve the overall services provided to consumers.

Research suggests that while customers are highly satisfied with network coverage and availability, pricing, rate plans and complaint resolution are the key areas for improvement. Among the two operators, while no significant differences are observed, Ooredoo consumers are relatively more satisfied with overall quality of services compared with Vodafone consumers. This finding is probably the result of Ooredoo being the incumbent operator and Vodafone being the new entrant.

Telecom consumers in Al Daayen municipality are less satisfied with their services compared with those in other municipalities. Among various product lines, dissatisfaction is the highest for Internet (Copper) service, which should be remedied with quick and smooth transition to fiber broadband. It is also worth noting that prepaid users are relatively less satisfied than postpaid users. Overall, females and 15-24 year olds are more dissatisfied with quality of service than the overall population. In addition, the survey points to the need to enhance the overall experience of females and Qataris with the customer care center interactions.

Quality of Services (QoS)

Eighty-eight percent of the telecom consumers in Qatar are satisfied with their telecom services. Satisfaction levels in Qatar are relatively better than the Walker global benchmark (84 percent) and on par with countries such as UK, Australia and Singapore. More than 90 percent of the consumers surveyed are satisfied with network related aspects, such as ‘network availability and spread’, ‘voice and SMS’ and also ‘data services’. Satisfaction levels on network related aspects in Qatar are better than those in other countries.

Overall, provision of services is a very strong area for the telecom sector in Qatar with more than 95 percent of consumers satisfied on various aspects including ease of purchasing the connection, sales agent interaction, initial supply time, and minimum service period for the product. There is however, a need to make the activation process easier with 12 percent dissatisfied with the process. This probably can be done by reducing customer involvement during the process.

Only about one-third of survey respondents feel that the telecom services provided in Qatar are extremely/ very competitive. Thus there is room in the Qatar’s telecom market to offer still better services and be seen as more competitive.

Migration from Copper to Fibre

Given the telecom sector’s priority to migrate Internet copper consumers to fiber broadband, it is important to provide customers with a satisfactory experience. An overwhelming majority (94 percent) of customers who have experienced the switching process are satisfied with it. Further, among those who have migrated from copper to fibre, 90 percent of them are satisfied with the quality of broadband after the switch and only a miniscule 1 percent of the switchers feel that the quality has declined. A high level of satisfaction with broadband is very encouraging for the growth of Qatar’s telecom market.

Pricing and Tariffs

Only around 30 percent of the consumers surveyed feel that the prices in Qatar’s telecom market are very competitive and only 22 percent of consumers perceive the prices for various services to be low. The transient population, in particular, perceives the services to be highly priced. In addition, discontent in pricing is highest among copper Internet users-- 41 percent perceive the service as highly priced -- and fixed line users, with 24 percent believing the service as highly priced. On a positive note, perceptions of price among telecom consumers in Qatar are more positive than Walker’s benchmarks.

About 20 percent of the consumers believe the charges for various services to be highly priced. International calling and roaming charges, in particular, are perceived to be expensive. Consumers’ opinion about pricing is quite similar across various product lines.

More than 90 percent of consumers are satisfied with 'clarity of rate plans' and 'clear terms and conditions'. However, 19 percent of customers are dissatisfied with 'variety of rate plans', an area of concern among both Ooredoo and Vodafone customers.

While 90 percent of the consumers are satisfied with current tariff publications, only 5 percent of the consumers are aware of the fact that CRA is mandated to have tariffs published by the service providers. About 40 percent of consumers would prefer tariffs to be published on the CRA website.

Given a similar pricing/offer structure of the two operators for mobile voice and data services, consumers may not benefit greatly from options such as Mobile Number Portability (MNP). Only about one-third of consumers are aware of MNP and just a small fraction (less than 3 percent) claims to have used it in the past. Also, with 28 percent dissatisfaction with the MNP process, there is a need to make the process more customer friendly.

Protection of Consumer Rights

One of CRA's major mandates is to protect telecom consumers from misleading and unfair practices of the service providers. Thus the survey measured how consumers feel about the operators' promotional messages and clarity of advertising. More than 90 percent of the consumers surveyed are satisfied with reduced spamming and clarity of advertising/ communication by the service providers. Further, there is hardly anyone who feels that communications from service providers are misleading. However, 11 percent of consumers are dissatisfied with options provided by service providers to opt out of promotional messages, indicating a need for service providers to strictly adhere to guidelines issued by CRA with respect to advertising/ promotions.

Additionally, CRA has issued guidelines to protect the public from exposure to Electromagnetic Fields (EMF) radiations within the frequency range of cellular mobile services. Only about one-fourth of the consumers surveyed are aware of adverse health effects of EMF radiations, and as such, consumers haven't raised any issue with their service provider or with CRA thus far.

Complaint Resolution

One of the key mandates for CRA is to ensure a dispute resolution system that is transparent, fair, speedy, and effective. Only 7 percent of customers claimed to have raised a complaint with their service providers in the past six months. Those complaints relate mainly to network coverage and connectivity related issues. Based on the Service Regulatory Framework 2014 published by CRA, 95 percent of the complaints should be resolved within five working days. However, only 37 percent of the customers who filed a complaint claimed that their issue was resolved within a five-day timeframe. This is an area of concern for both mobile and fixed services. Further there is significant dissatisfaction on speed of resolution of a complaint as well as with complaints being resolved within a committed time period.

It is also worth noting that about one-third of the consumers surveyed are aware of the process for getting their complaints resolved in case these complaints are not resolved by their service providers.

Currently, there is a very small proportion of customers who use non-traditional modes --such as social media, Qatar government Call Center (Hukoomi), mobile applications from CRA or service providers -- to raise their complaints. Thus there is significant scope to enhance usage of online modes of communication by consumers, backed-up by adequate and swift action, eliminating the potential gap between expectations and reality.

Customer Loyalty and Image Perceptions about Service Providers

While Ooredoo customers are more loyal toward their service provider than Vodafone customers –27 percent are 'Truly Loyal' to Ooredoo compared with 16 percent for Vodafone), the customer loyalty in the telecom sector in Qatar is weaker than global benchmarks.

Customers using fiber broadband, fixed voice, and data SIM services are relatively more loyal compared to those using other services. Also, as expected, the postpaid consumers are more loyal as compared to prepaid consumers, according to this survey.

The perception of service providers was also explored. Only moderate endorsements are observed for both Ooredoo and Vodafone. With just around 50 percent positive endorsements for each of them, there is room to enhance the perception of service providers across most of the image parameters, such as leader in the mobile industry, brand preferred over others, reputation, responsive, trustworthy, and transparent in dealings.

Customer Experience with Service Providers across Key Touch-Points

Customers interact with their service provider in three key ways -- in-person visits to company outlets, phoning a customer care center, or online interaction through social media or mobile apps). Both operators are equally active across all the three touch-points.

Company Outlet: Almost one-third of the customers who visited a service providers' outlet in the last six months from the time the survey took place did so for payment or billing related activities followed by

20 percent of customers who visited the outlet to obtain information on various plans. A majority of customers (for both Ooredoo and Vodafone) are satisfied with their visits to a company outlet.

Customer Care Call Center: About one-fourth (26 percent) of telecom consumers in Qatar claimed to have contacted the call center in the last six months, while one-third have never phoned the call center. The most important reason for contacting the Vodafone call center is for network/ coverage issues (36 percent) while for Ooredoo it is about obtaining information on rate plans (27 percent). Customers' experience with customer care is quite unsatisfactory with high dissatisfaction on "wait time" being the key area of concern for both Ooredoo and Vodafone. There is a clear need to focus on improving wait time and turnaround time (for resolving query/ problem/complaint) at the call centers.

Online Platforms: With 88 percent penetration, telecom users in Qatar are heavy users of Internet-related services. In terms of social media usage, Facebook followed by Twitter are the two key platforms used by both the service providers as well as by the consumers for interaction related to telecom services. Given high Internet penetration, there is significant room to increase consumer interaction with service providers over various social media platforms. Concentrated efforts are required to address consumer queries, requests, and issues over social media with utmost efficiency.

With only about 6 percent of consumers using mobile apps provided by service providers, there is a need to enhance awareness of mobile apps and encourage more consumers to use them. Most of the mobile app users are quite satisfied, which is a good indicator and motivator for its future growth.

CONCLUSION

While the survey reveals that around 88 percent of telecom users in the country are satisfied with the quality of services provided by their respective service providers, there is room to improve the overall services provided to consumers, considering the various global norms.

The major areas for improvement include pricing, rate plans, and complaint resolution. In addition, promotion of MNP services, building awareness about the benefits of green billing, and conducting a comparative study of pricing across other countries are also recommended. Consumer feedback also reveals four key considerations for CRA:

CRA's Awareness and Mandate

- Concentrated campaigns focused on CRA's mandate, promotion of of new technological adoptions and initiatives such as green bills should be undertaken.
- Tariffs should be duly published on a suitable platform and consumers should be communicated with in order to manage their expectations.

Quality of Services

- CRA needs to ensure that service providers actively promote MNP service and have clear norms in place to ensure timely porting and strong customer experience
- Communicate the benefits of green billing and target universal green billing within a specified time period.

Market Competitiveness

- Conduct a comparative study of pricing across other countries to understand the pricing policy in Qatar vis-à-vis other countries.
- Look at the feasibility of introducing another operator (either a full-service provider or MVNO) into the market

Complaint Resolution

- Complaints not resolved within 30 days should be automatically escalated to CRA and service providers should file a monthly summary report with CRA of complaints registered and resolved to CRA
- Establish clear Service Legal Agreements and ensure that service providers deal with complaints generated via social media. There is also a need for CRA to monitor Qatar's telecom social media space on a continuous basis.

Consumer Rights Protection

- CRA needs to strictly ensure that service providers adhere to the guidelines related to opting out of promotional messages.
- Establish clear timelines for fiber broadband rollout plan that existing or new service providers need to comply with.

Background

In 2014, the Communications Regulatory Authority (CRA) was established by an Emiri Decree (42) in 2014 with the aim of providing advanced and reliable telecommunications services across the state of Qatar. CRA regulates the Telecommunications and Information Technology sector, postal services as well as access to digital media and spectrum.

Aligned to the Qatar National Vision 2030 goals, provision of high quality services that respond to the needs and the desires of consumers is an important part of CRA strategic goals for the year 2015. The two key objectives of CRA are:

- To ensure that all consumers (individuals, businesses & government) have access to a broad range of communications services (at reasonable prices)
- To ensure that the sector is competitive and there is adequate protection of consumer rights

Given CRA mandate and objectives, a research study was commissioned with AMRB LLC to evaluate the consumers' levels of satisfaction with regards to delivery of telecommunication services, prices charged and the competitiveness of the market.

The survey was conducted in the months of November and December 2014, wherein more than 2500 consumers across the State of Qatar were interviewed in person. The survey was conducted across different municipalities, demographics (such as age, gender, occupation, nationality, income etc.) and users of different products/ services and brands. Further, the population sample chosen for the study is representative of the Qatar population across key metrics (such as gender, ethnicities, age and geographic locations). The survey results are projected on overall population statistics based on operators/ services, key demographics and locations. Further, from survey point of view, the population of Qatar has been divided into mainstream and transient population.

The resulting report thus provides a roadmap wherein CRA can attain its goals of ensuring optimum 'Quality of Services' and 'market competitiveness' in telecom sector in the State of Qatar. Further, the report also serves as a robust baseline study, which would help CRA measure progress on a regular basis and ensure there are no let-ups in services to consumers.

Research Objectives

The key objectives of this research rally around CRA's mandate of ensuring optimum quality of services and market competitiveness (both in terms of services as well as prices). The key objectives were thus outlined as mentioned below:

- Awareness of CRA and its mandate
- Level of satisfaction with QoS (Related to network, prices, tariffs, provisioning etc.) and other parameters of importance
- Competitiveness of market in terms of services provided and prices charged
- Satisfaction with complaint resolution mechanism
- Consumer views on protection of rights from unfair practices by Service Providers
- Equal access of technology and services to all

- Key areas to be monitored over time for service providers

Research Methodology

The research methodology for the study consisted of 5 different modules:

- Exploratory Phase
- Secondary Research
- Qualitative Phase
- Quantitative Phase
- Social Media

The details of the 5 different modules are given in Appendix I

Exploratory Phase

In this phase, face-to-face in-depth interviews were conducted with various stakeholders, both internal and external, to understand customer touch-points in detail. A total of 10 such discussions were conducted and the same are illustrated in Appendix I.

Qualitative Survey

This phase of research involved conducting a qualitative evaluation to understand the importance of various communication services, the consumers' levels of satisfaction in the receipt and delivery of telecommunication services quality, price satisfaction and assess the competitiveness of the market. To address these objectives, 9 mini focus groups were conducted among different as depicted in the table (Refer table 1and table 2) in Appendix I:

The key findings from qualitative phase have been embedded within the overall research findings within this report.

Quantitative Survey

Basis the inputs from exploratory and qualitative phases, a large scale quantitative survey was then conducted among the end-users of telecommunication service in Qatar to understand and quantify their experiences with various products and services offered.

Target Group

As mentioned earlier, the target respondents were spread across locations, belonging to various demographics and using ICT services as offered by the two service providers. Further, some of the key criteria for identifying eligible respondents were:

- **USAGE**: Should be an active user of ICT products (defined as using the product for at-least past 3 months)
- **TYPE OF USER**: Primary user of the said product/ service (defined as the one who is responsible for making key decisions with respect to the product)

- **DUAL/ MULTIPLE PRODUCT USAGE**: It is assumed that many consumers would be using multiple products under consideration. For such users, feedback has been obtained for maximum of 2 services used.

Data Collection Instrument/ Questionnaire

Post the exploratory and qualitative phase, detailed discussions were held between CRA and AMRB, based on which the questionnaire was devised. The salient features of questionnaire were:

- A structured questionnaire (i.e. scaled questions) with some scope for respondent comments
- Scientifically valid 5 point Likert (labeled) scales, for effectively measuring customer experience. The scales were further calibrated (to Binary scales) to reflect their satisfaction with Quality of Services and other touch-points with service providers. This also helped in close comparison with international benchmarks.
- The questionnaire was prepared in both English & Arabic languages so as to allow the respondent liberty of answering in his/ her preferred language

Data Collection Mode

Face-to-face interviews were conducted with eligible respondents using CAPI (Computer Assisted Personal Interviewing) methodology. The interview duration was 30- 35 minutes on average. Fieldwork was conducted from November 15^{th} 2014 to January 10^{th} 2015.

The respondents were intercepted at a general location (such as malls, coffee shops, public places etc.) and interviewed based on their convenience. The survey was administered for one or two services depending on their eligibility.

Sample Distribution

A total of 2526 respondents were interviewed with 2206 interviews in the Mainstream segment and 320 among the Transient population. This sample represents findings at an overall confidence level of 95% and a +/- 3% error margin over the entire population.

Quota based sampling was adopted to ensure that the sample was adequately distributed among different categories (The sample distribution as per each of the category is presented in Appendix IV):

- Services
- Service Providers
- Geographical Location
- Nationality
- Gender
- Age
- Profession

Data Weighting Approach

In order for the sample to represent the universe, the data was weighed using RIM (Random Iterative Method) methodology and following parameters were used for the same:

- Mainstream and Transient Population
- Geographical Location
- Service and Service Provider
- Nationality (Qatari and Non Qatari)
- Age

The weighting factors were obtained from published findings of Qatar Statistics Authority[1] and subscription numbers for different services shared by CRA. Details of weighting factors are mentioned in Appendix III

Research Framework

The quantitative phase of the research has been conducted on the basis of the Walker Framework. Walker Framework has been utilized specifically to arrive at and appropriating action areas for CRA and service providers. While the above framework remains consistent across various industry sectors, same has been suitably modified to telecom sector (and specific to telecom products & services provided in the State of Qatar). The framework has been used to develop the questionnaire as used in this survey. The detailed framework as used is illustrated in Appendix I.

Benchmarking with Walker & Other International Telecom Regulatory Bodies

This study is aimed at capturing telecom consumers' opinions about the services currently offered to them by telecom service operators. From a regulator's perspective, the customers need to be satisfied with the services provided by operators in the market. Considering various global norms and discussions with telecom experts, the report uses the following Quality of Service (QoS) norms:

Services with 95% or more consumers satisfied : Excellent
Services with 91 - 94% consumers satisfied : Acceptable (Maintain status quo)
Services with 85 – 90% consumers satisfied : Need minor intervention by the Regulator
Services with <85% consumers satisfied : Need significant intervention by the Regulator

Following norms have been considered for this research:

1. Walker Stakeholder Relationship Database (SRD): Global and North America
2. Telecom regulatory bodies in 4 countries, viz.
    a. Singapore: Consumer Awareness and Satisfaction Survey 2014 – iDA Singapore
    b. UK: Ofcom – The Communication Market Report, 7th August 2014
    c. Australia: ACMA – Communication Report 2014

[1] Qatar Statistics Authority Annual Statistical Abstract 2013 and Labor_Force_Quarterly_July_Sep_Statistics_MDPS_AE_Q2_201

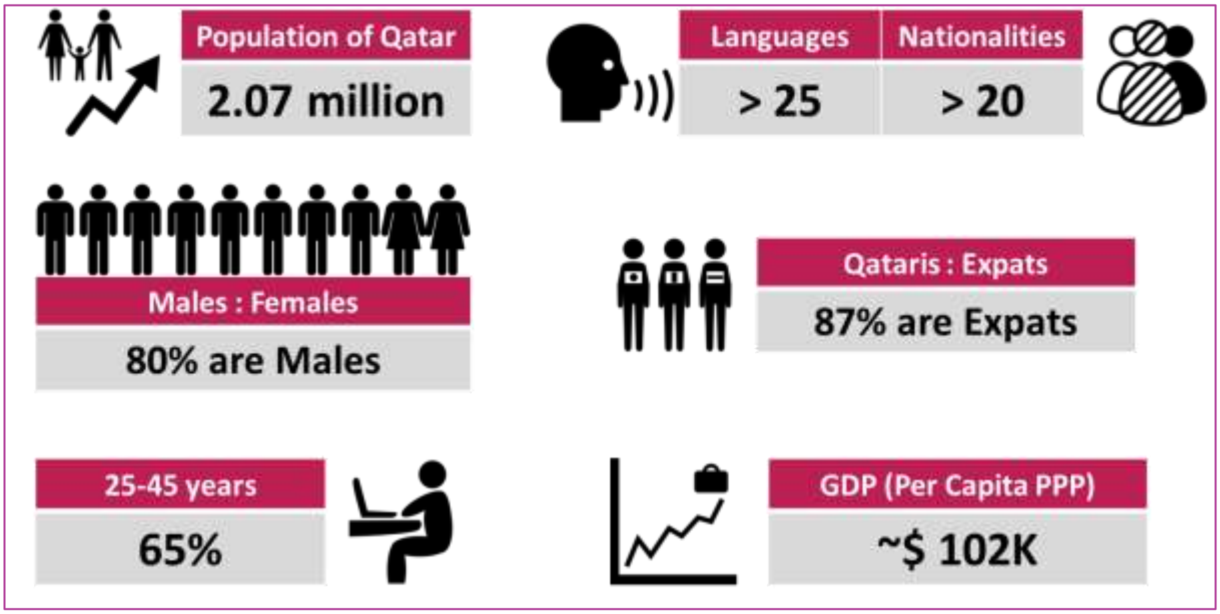
d. UAE: ICT in the UAE Household Survey, 2014

About Qatar and its Telecom Market

Diversity in Demographics

The population of Qatar as per 2013 survey[2] is 2 million, and is unique with more than 80% male and close to 87% expat population (primarily males). Further, the population of Qatar is considerably younger with 40% of the population in 25-34 age groups. Also, Qatar has a considerable transient population who reside in labor accommodation (primarily males in 25-30 age brackets). These unique demographics suggest that communication services need to cater differently to different groups and hence the customer satisfaction and expectations are expected to vary widely as well.

Figure 1: Qatar's Demographic Diversity



Source: Ministry of Development, Planning & Statistics 2014

Telecom Market in the State of Qatar

Qatar's telecom market is supported by high incomes of resident population, and as a result is **one of the most developed** in the region. It has above 100% mobile penetration and an Internet penetration of 96% at a household level. Also, at 54%, 3G penetration in Qatar is much higher as compared to regional (MENA) average of 34%.

As per the latest International Telecom Union (ITU) statistics, the mobile subscriber base has been increasing consistently and is likely to stabilize in the coming years (Figure 2). The fixed line subscriptions are also increasing consistently but the penetration rate might decrease due to increase in households (Figure 3).

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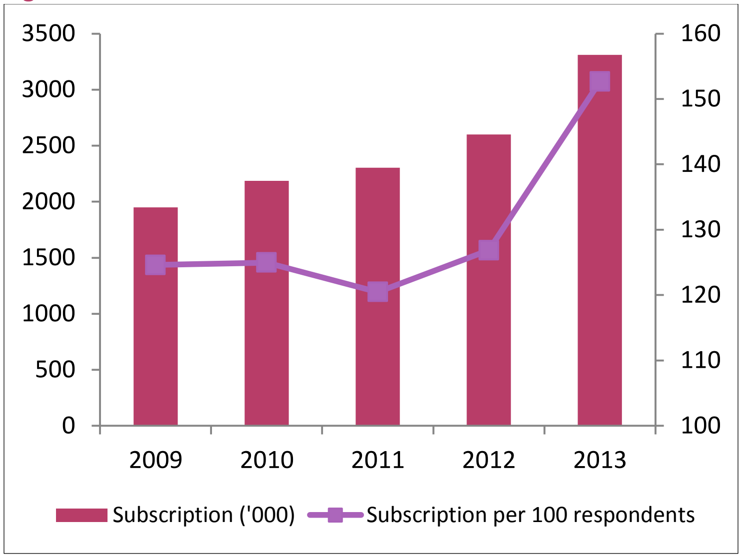
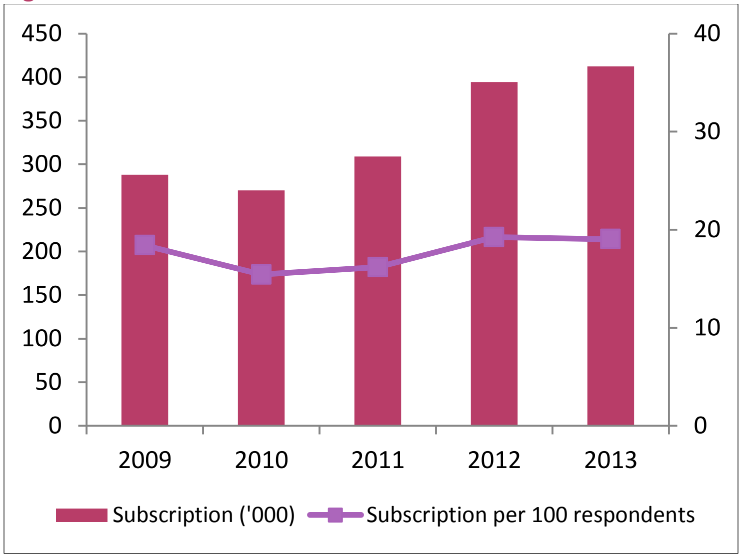
[2] Qatar Statistics Authority Annual Statistical Abstract 2013

Figure 2: Qatar Mobile Market



Source: ITU data as published on ITU Website

Figure 3: Qatar Fixed Line Market



Source: ITU data as published on ITU Website

What drives consumers' 'Need for Communication' in Qatar

The qualitative research indicated that the three key reasons specified by consumers for using communication services are:

1. Need for consumers to be **in touch** with their family, friends and professional acquaintances
2. Need for **entertainment**: Telecommunication products are not just seen as sources of information but also as a source of entertainment
3. Need for **information :** Availability of new technological products and services have allowed the consumers to use them as sources of information

Communication and mobile are very essential for consumers. Consumers see this as their lifeline and they cannot imagine life without it.

> *"...no way I can live one day without a mobile, I would be totally lost, you would feel like you don't exist because people are not able to contact you"* **(18-25 years old Qatari Male)**

> *"Mobile gives me a security feeling and accessibility to me"* **(25-35 year old Western Male)**

Three Key Stakeholders in Qatar's Telecom Market

With two service providers currently operating, the telecom market in Qatar is characterized by its duopoly, with CRA (Communications Regulatory Authority) as the market regulator. The three key stakeholders include

1. Communication Regulatory Authority (CRA)
2. Ooredoo, incumbent telecom service provider
3. Vodafone, new telecom service provider

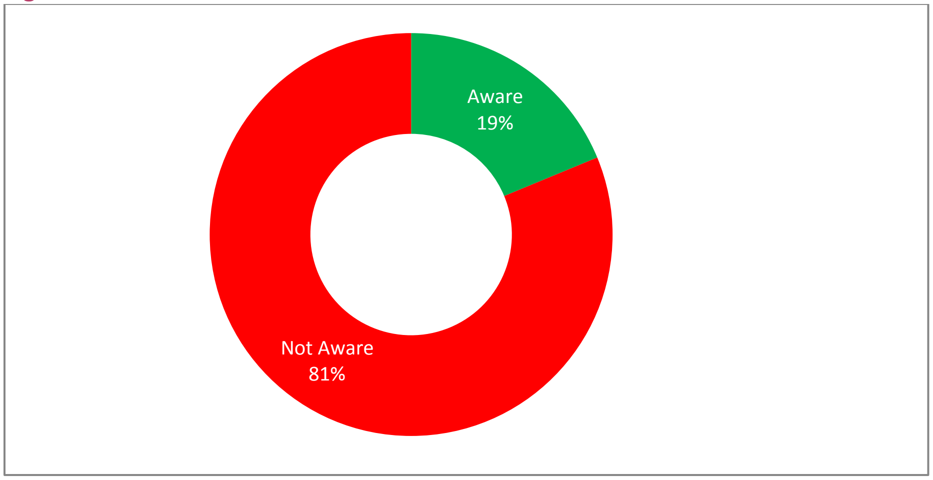
Communications Regulatory Authority (CRA)

With the core purpose of regulating Qatar's telecom sector, Communications Regulatory Authority (CRA) was established in 2014. The CRA encourages and supports an open and competitive Information & Communications Technology (ICT) sector that provides advanced, innovative, and reliable communications services. Balancing the rights of consumers with the needs of service providers is one of the core objectives of the CRA.

Around 1/5th (19%) of the telecom consumers are aware of CRA (Figure 4). CRA, which was earlier known as ictQATAR, had an awareness of 22% (as per 2012 Customer Satisfaction Survey). In this context, 19% recognition for CRA is encouraging. However, a significant proportion of consumers are not aware of CRA, and this needs to be addressed by increasing the visibility and accessibility of CRA. It is desirable for CRA to have universal awareness of its existence and working. In particular, there is a need to enhance awareness amongst males, Non-Qataris and younger population.

CRA needs to engage more with consumers and enhance its awareness. This can be done through concentrated campaigns focused on aspects related to CRA's mandate, which would resonate well with the consumers. The campaigns can be related to protecting consumer rights, innovations in the market, market competitiveness and fairness of services provided etc. The campaigns can also revolve around adoption of new technologies and facilities (such as Mobile Apps, promotion of online billing and payment etc.) for the consumers. Further, apart from engagement through traditional media like television and print, it should also include social media and arranging workshops.

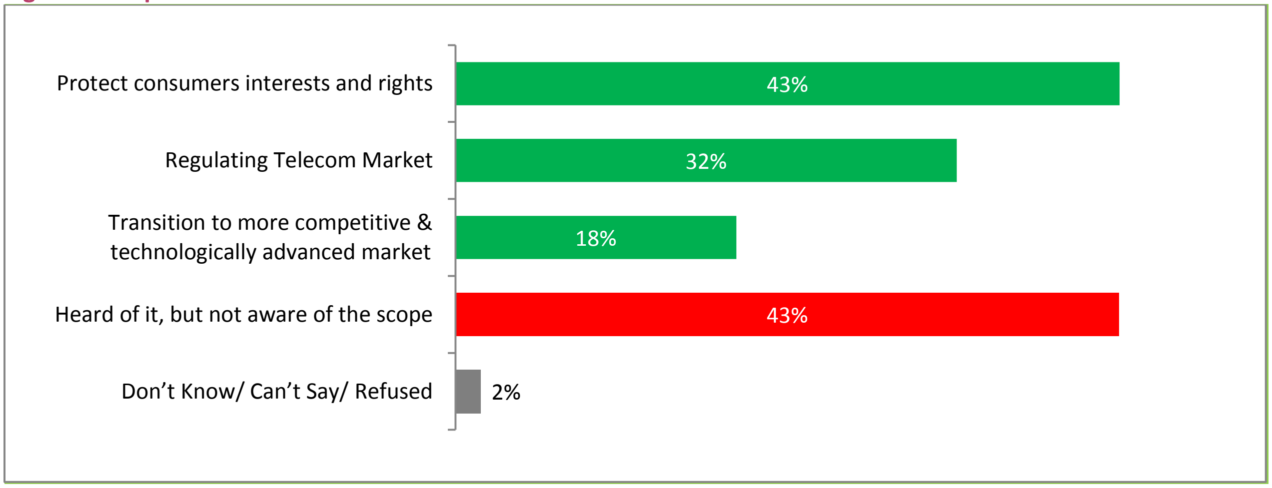
Figure 4: Awareness of CRA



Source: Customer Satisfaction Survey; Overall population n=2526

Though a significant proportion of those aware of CRA are also aware of CRA's role and functions, it is imperative to build CRA awareness among larger population of Qatar. (Refer figure 5: 43% of those aware of CRA are not aware of its scope).

Figure 5: Scope of CRA



Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who are aware of CRA (n=495)

Consumers do have some suggestions for CRA to improve the telecom services in Qatar. These suggestions are mainly related to pricing, network improvements and increasing competition in the market. Some of the customer comments with regards to suggestions for CRA are:

> *"The regulator should organize the tele- communication market and also the companies that are operating in the space"* ***(Arab male, 35-45 years)***

> *"I think they should be encouraging competition by making conditions to encourage more service providers in market"* ***(Western male, 25-35 years)***

Service Providers in Qatar's Telecom Market

As mentioned earlier, with two service providers currently operating, Qatar's telecom space is characterized by duopoly. Ooredoo and Vodafone Qatar are the two operators authorized to provide telecom services in the State of Qatar.

Ooredoo, formerly Qatar Telecom (Qtel), is the incumbent telecoms operator in Qatar. Ooredoo was established in 1987 as the Qatar Public Telecommunications Corporation (QPTC), when the government of Qatar corporatized the telecommunications department of the Ministry of Communications and Transport. QPTC changed its name to Qtel QSC in 1998; and in 2013, the group launched the new Ooredoo brand identity. Ooredoo is an integrated telecom player offering mobile (voice and broadband) and fixed (landline and internet) services.

Having launched its mobile operations in Qatar in 2009, Vodafone Qatar became the country's second telecom service provider. Vodafone is licensed to offer mobile and wireline telecoms services, which should allow Vodafone to offer converged services (fixed, mobile and internet). As of now, Vodafone Qatar is primarily a mobile operator and has recently started offering fixed services in a few areas of Qatar (Mainly Barwa city and Pearl).

Consumer Opinion and Satisfaction with Touch-Points: CRA's Perspective

As the telecom regulator in the State of Qatar, CRA's mandate is to:

- Regulate the communications sector
- Set quality of service standards and monitor compliance
- Ensure the efficient management and allocation of scarce resources such as radio spectrum, numbering, and domain names
- Protect consumers from misleading and unfair practices
- Manage a dispute resolution system that is transparent, fair, speedy, and effective

Given this mandate, it is important to understand consumers' opinion and satisfaction with various touch-points they have with their service providers and with CRA.

Quality of Services (QoS) and Compliance

One of the key mandates of CRA is to set service standards (Across various consumer touch-points) and monitor operators' compliance with the same. The key areas covered as a part of QoS are:

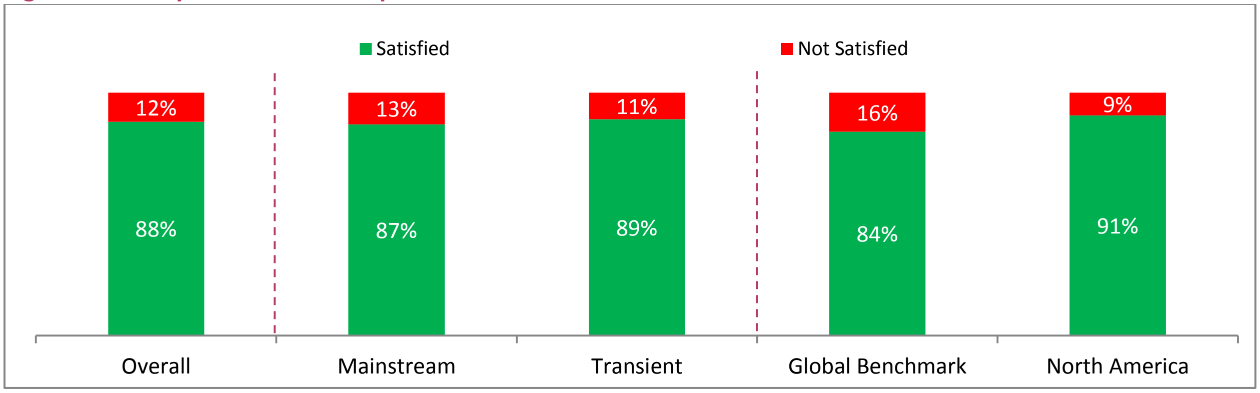
- Experience with network related services
    - Network Coverage
    - Availability of Network
    - Voice & SMS related
    - Data services related
- Provisioning: Purchase & Activation
- Market competitiveness wrt quality of services

Before looking into these services, it is important to understand how customers perceive about the quality of services at a broader level.

Consumers Perception about Overall Quality of Services (QoS)

At an overall level, 88% of the telecom consumers in Qatar are satisfied with the telecom services, which indicate a scope to improve the same (Figure 6). The satisfaction levels are observed to be quite similar among mainstream and transient population. It is noted that the satisfaction levels in the State of Qatar are relatively weaker than Walker North America benchmarks.

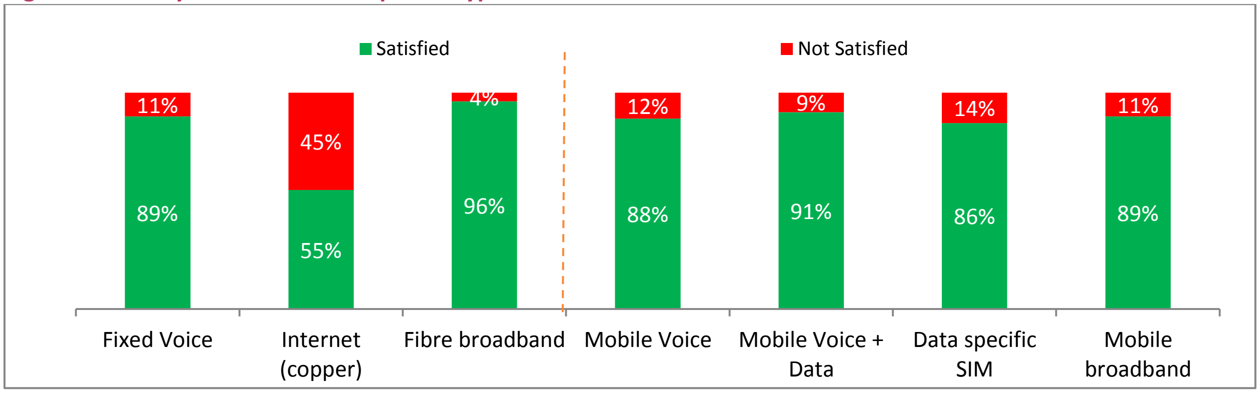
Figure 6: Quality of Services Perception: Overall & Walker Benchmarks



Source: Customer Satisfaction Survey; Overall sample n=2526
Benchmarks are from Walker Stakeholder Relationship Database
Note: Numbers may not add up to 100 percent due to rounding

Satisfaction levels among consumers vary across services, with higher satisfaction observed for 'Fibre Broadband' and lower for 'Internet (Copper)' service (Figure 7). It is observed that satisfaction levels among consumers in Qatar are at par with countries such as UK, Australia and Singapore (Table 1).

Figure 7: Quality of Services Perception: Type of Service



Source: Customer Satisfaction Survey; Overall sample n=2526
Note: Numbers may not add up to 100 percent due to rounding

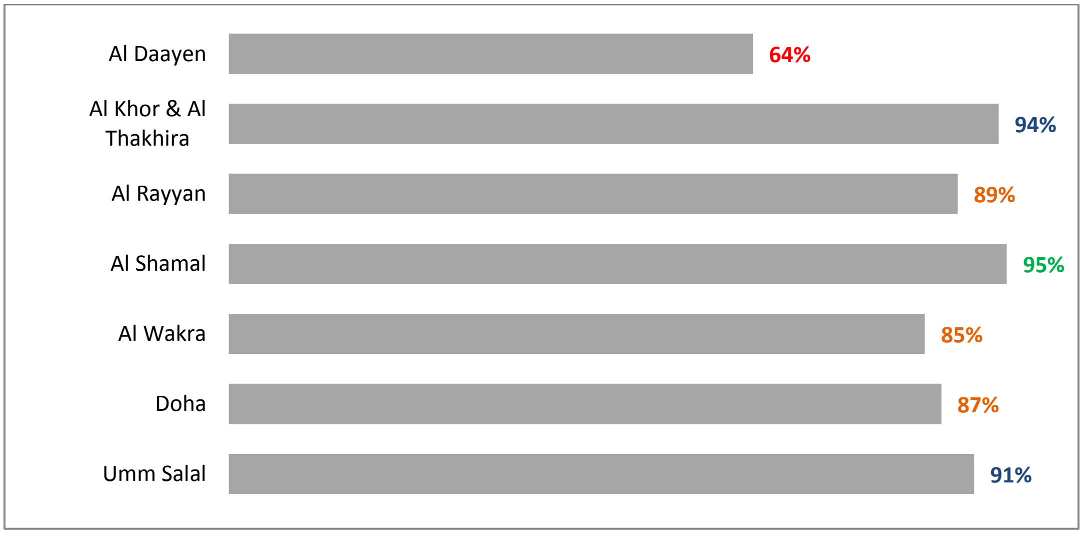
Table 1: Quality of Service: Country-wise Benchmarks

Services	Qatar	UK	Australia	Singapore*	UAE
Fixed Voice	89	89	89	78	94
Internet (Copper)	55	NA	NA	NA	NA
Fibre Broadband	96	88	79[#]	65	93[#]
Mobile Voice	88	93	86	73	93
Mobile Voice+ Data	91	88**	79[#]	66**	93[#]
Data Specific SIM	86	NA	NA	NA	NA
Mobile Broadband	89	NA	NA	NA	NA

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
**Singapore benchmarks are calibrated from Mean*
*** Mobile Broadband number*
 # Only Internet has been mentioned instead of Mobile Broadband and Fixed Broadband

Satisfaction levels are observed to be higher among consumers residing in Al Shamal and Al Khor/ Al Thakhira (Figure 8). At 64% satisfaction, Al Daayen residents are the least satisfied with overall quality of telecom services.

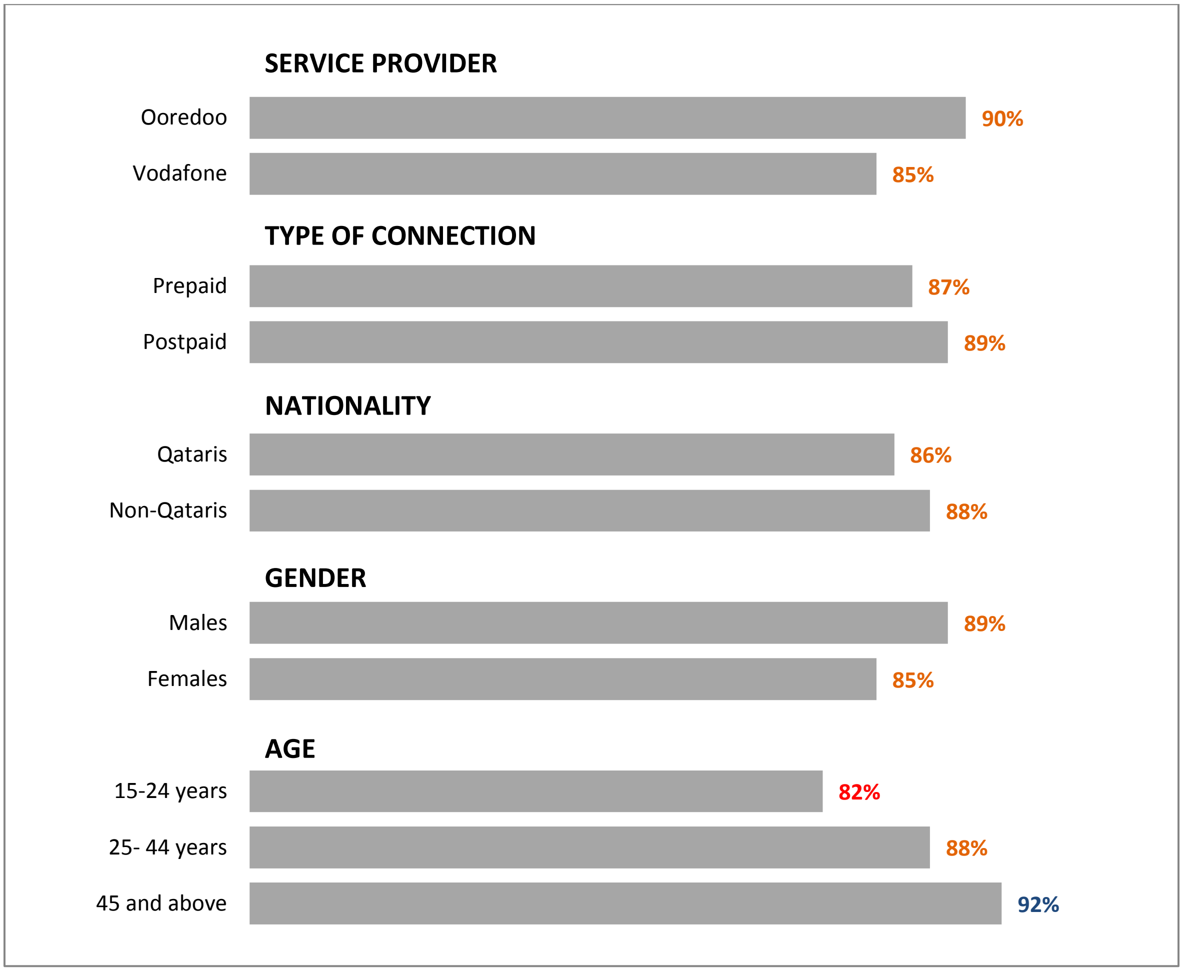
Figure 8: Quality of Services Perception: By Municipalities



Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

The research shows that Ooredoo consumers are much more satisfied as compared to their Vodafone counterparts (90% for Ooredoo as against 85% for Vodafone). Satisfaction among the younger consumers is 82%, which is much lower than that among other consumers. No significant difference is observed by type of connection, nationality or gender (Figure 9).

Figure 9: Quality of Service Perception: By Segments



Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Table 2: Satisfaction with QoS: By Service and Municipality

	Fixed			Mobile			
	Fixed Voice	Internet (Copper)	Fibre Broadband	Mobile Voice	Mobile Voice + Data	Data Specific SIM	Mobile Broadband
Overall	89	55	96	88	91	86	89
Al Daayen	76	3	84	84	97	72	84
Al Khor & Al Thakhira	90	92	97	93	96	86	95
Al Rayyan	87	81	93	87	92	78	92
Al Shamal	88	95	99	73	92	72	100
Al Wakra	98	98	99	94	84	97	98
Doha	86	81	96	86	90	88	83
Umm Salal	95	100	94	81	88	85	89

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Sample for service by each municipality is low. Hence, numbers are largely indicative

Customer Experience with Network Related Services

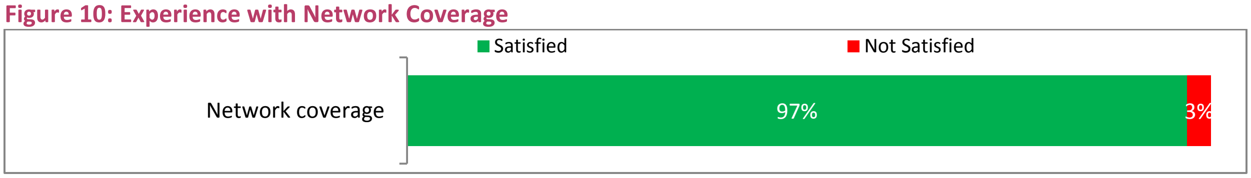
This section talks about various aspects related to network experience, viz. network availability, coverage, voice & SMS related services and data related services.

Network Coverage

More than 95% of the consumers are satisfied with network coverage in Qatar (Figure 10). The satisfaction levels in Qatar are observed to be better as compared to available international benchmarks for mobile voice services (Table 3).

Coverage of network is observed to be quite similar and strong for various mobile related services and also across various municipalities (Table 4 and 5). Further no considerable difference is observed among the two service providers (Table 6).

Figure 10: Experience with Network Coverage



Source: Customer Satisfaction Survey; Overall sample n=2526
Note: Numbers may not add up to 100 percent due to rounding

Table 3: Network Coverage: Country-wise Benchmarks

Network Availability & Spread	Mobile Voice Qatar	Mobile – UK	Mobile- UAE
Network coverage	97	NA	90

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Table 4: Network Coverage: Type of Service

Network Availability & Spread	Overall	Fixed			Mobile			
		Fixed Line	Internet (copper)	Fibre Broadband	Mobile Voice	Mobile Voice+ Mobile Data	Data Specific SIM	Mobile Broadband
Network coverage	97	NA	NA	NA	97	96	95	99

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Table 5: Network Coverage: By Municipality

Network Availability & Spread	Overall	Al Daayen	Al Khor & Al Thakhira	Al Rayyan	Al Shamal	Al Wakra	Doha	Umm Salal
Network coverage	97	100	99	99	99	92	96	98

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Table 6: Network Coverage: By Service Provider

Network Availability & Spread	Overall	Ooredoo	Vodafone

Network coverage	97	98	96

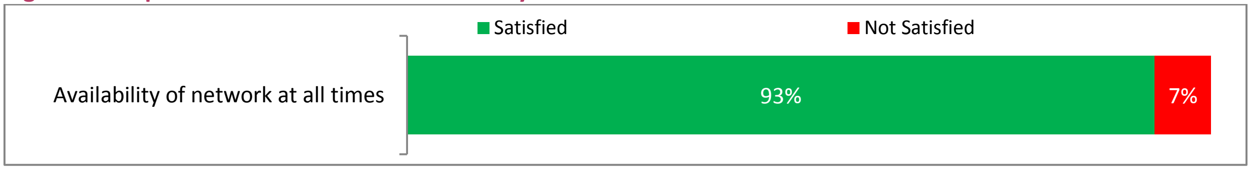
Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Availability of Network

More than 90% of the consumers are satisfied with network availability in Qatar (Figure 11). The satisfaction level for network availability for mobile voice service in Qatar is observed to be better as compared to available international benchmarks for mobile voice services (Table 7).

At a service level, relatively lower satisfaction is observed for 'network availability at all times' for mobile broadband service (Table 8). As observed earlier as well, satisfaction is very low among Internet (Copper) users, and a smooth migration to a highly satisfactory fibre broadband service is required. Consumers in the newer municipality of Al Daayen are much less satisfied with network availability as compared to those in other municipalities (Table 9). Network availability for Ooredoo is observed to be better than that for Vodafone (Table 10).

Figure 11: Experience with Network Availability



Source: Customer Satisfaction Survey; Overall sample n=2526
Note: Numbers may not add up to 100 percent due to rounding

Table 7: Network Availability: Country-wise Benchmarks

Network Availability & Spread	Mobile Voice Qatar	Mobile – UK	Mobile- UAE
Availability of network all times	94	87	NA

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Table 8: Network Availability: Type of Service

Network Availability & Spread	Overall	Fixed			Mobile			
		Fixed Line	Internet (copper)	Fibre Broadband	Mobile Voice	Mobile Voice+ Mobile Data	Data Specific SIM	Mobile Broadband
Availability of network all times	93	92	60	97	94	94	91	87

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Table 9: Network Availability: By Municipality

Network Availability & Spread	Overall	Al Daayen	Al Khor & Al Thakhira	Al Rayyan	Al Shamal	Al Wakra	Doha	Umm Salal
Availability of network all times	93	67	97	95	88	97	91	97

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Table 10: Network Availability: By Service Provider

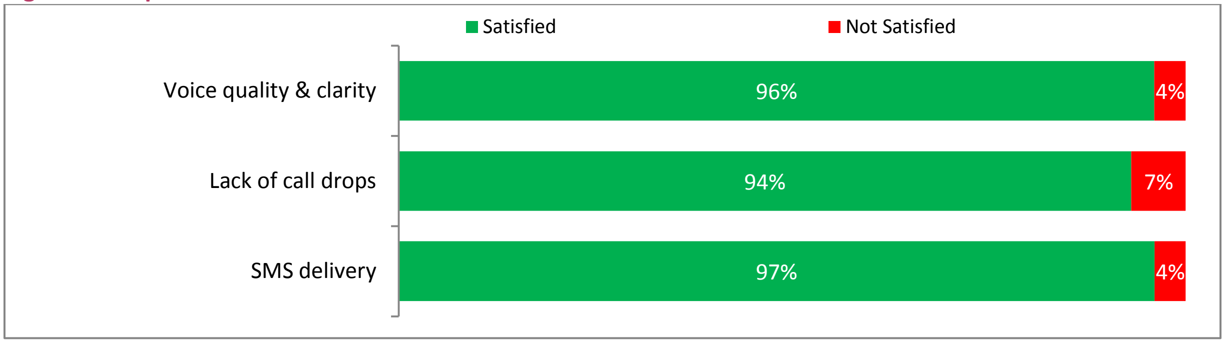
Network Availability & Spread	Overall	Ooredoo	Vodafone
Availability of network all times	93	94	90

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Voice & SMS Related Services

A majority (>95%) of customers are satisfied with voice and SMS related services provided by telecom service providers in Qatar (Figure 12). It is also observed that the voice and SMS related services garner high satisfaction among both mobile and fixed line users (Table 11). However, both Ooredoo and Vodafone users are observed to be equally satisfied (Table 11).

Figure 12: Experience with Voice and SMS Services



Source: Customer Satisfaction Survey; Overall sample n=2526
Note: Numbers may not add up to 100 percent due to rounding
Parameters are arranged in order of importance to consumers

Table 11: Experience with Voice and SMS Services: Type of Service & Service Provider

Voice and SMS Services	Overall	Fixed Line	Mobile Voice	Ooredoo	Vodafone
Voice quality & clarity	96	95	97	95	96
Lack of call drops	94	94	95	94	91
SMS delivery	97	NA	94	97	95

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Voice and SMS services are observed to be strong across most of the municipalities (Table 12). SMS delivery in particular, is very strong across the municipalities. However, some dissatisfaction is observed on voice quality/ clarity in Al Shamal (16% dissatisfaction), which could possibly be due to the fact that it is one of the newer municipalities. Drive test can further reveal the exact areas where the issue is particularly severe in the municipality. Also, 13% dissatisfaction is observed on 'lack of call drops' in Al Wakra municipality.

Table 12: Experience with Voice and SMS Services: By Municipality

Voice and SMS Services	Overall	Al Daayen	Al Khor & Al Thakhira	Al Rayyan	Al Shamal	Al Wakra	Doha	Umm Salal
Voice quality & clarity	96	100	97	100	84	88	95	99

Lack of call drops	94	92	96	92	98	87	96	97
SMS delivery	97	98	96	96	100	91	100	100

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

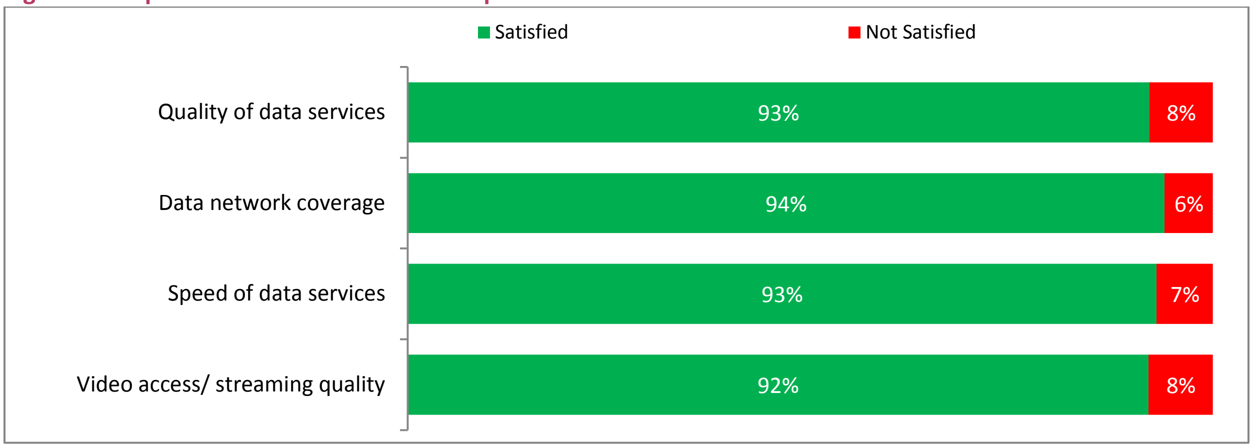
Network Quality: Data Services Related

With more than 90% satisfaction, data services are observed to be strong in Qatar (Figure 13).

An anecdotal experience by a satisfied customer (as reproduced below) is a good indicator and motivator to move to higher speed networks:

> *"…my positive experience is during the launch of the 4G service and in particular with the Mi-fi 4G service. I was impressed by the speed of the Internet and that is when I realized Qatar is changing for good"* ***(18-25 years old Qatari Male)***

Figure 13: Experience with Data Services Aspects



Source: Customer Satisfaction Survey; Overall sample n=2526
Note: Numbers may not add up to 100 percent due to rounding
Parameters are arranged in order of importance to consumers

Research shows that except for copper Internet (with around 70% dissatisfaction levels), data consumers across most of the other services are satisfied with the quality of data network coverage, speed and streaming quality (Table 13). However, more than 10% dissatisfaction is observed on data speed and streaming quality among data SIM users. Further on a positive note, the experience with data services in Qatar is observed to be more satisfactory as compared to that in countries benchmarked with (Table 14). Vodafone users are relatively more satisfied with data services as compared to Ooredoo users (Table 15).

Table 13: Experience with Data Services Aspects: Type of Service

Data Services	Overall	Fixed			Mobile			
		Fixed Line	Internet (copper)	Fibre Broadband	Mobile Voice	Mobile Voice+ Mobile Data	Data Specific SIM	Mobile Broadband
Quality of data services	93	NA	33	98	NA	94	91	97
Data network coverage	94	NA	32	98	NA	97	92	99
Speed of data services	93	NA	31	96	NA	96	88	95
Video access/streaming quality	92	NA	30	96	NA	95	89	97

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 14: Speed of Data Services: Country-wise Benchmarks

Data Services	Qatar	UK	Australia	UAE
Mobile Voice+ Mobile Data	**96**	81	63*	89*
Data Specific SIM	**88**	NA	NA	NA
Mobile Broadband	**95**	NA	NA	NA
Internet (copper)	**31**	NA	NA	NA
Fibre Broadband	**96**	84	63*	89*

Figures above represent proportion (%) of satisfied consumers
**Measured as Internet and not Mobile and Fixed*
Parameters are arranged in order of importance to consumers

Table 15: Experience with Data Services Aspects: By Service Provider

Data Services	Overall	Ooredoo	Vodafone
Quality of data services	**93**	**90**	**95**
Data network coverage	**94**	**93**	**95**
Speed of data services	**93**	**92**	**94**
Video access/streaming quality	**92**	**90**	**93**

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Provisioning: Purchase and Activation Process

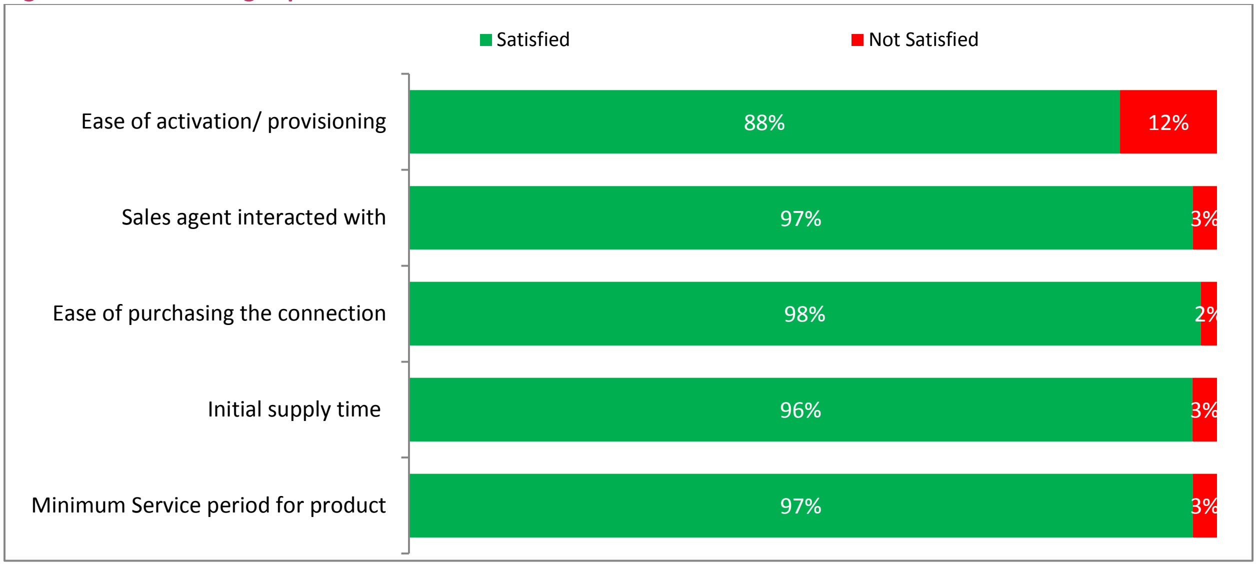
High satisfaction (Around 96-98%) is observed on various provisioning related aspects, such as initial supply time, sales agent interaction, ease of purchasing and minimum service period for the product (Figure 14). However, more than 10% of the consumers are dissatisfied with 'ease of activation/ provisioning'.

An anecdotal experience by a satisfied customer is reproduced below:

> *"When I installed Internet at home, Ooredoo spent almost 1 hour on phone to try and help me in installation. Even the supervisor joined in the call to get it installed. I really appreciate the experience"* ***(25-35 year old Western Male)***

96% observed customer satisfaction for 'initial supply time' is well within the KPIs as set by CRA for service providers in Qatar (Figure 14 and Table 16).

Figure 14: Provisioning Experience: Overall



Source: Customer Satisfaction Survey; Overall sample n=2526
Note: Numbers may not add up to 100 percent due to rounding
Parameters are arranged in order of importance to consumers

Table 16: CRA KPIs for Service Providers: QoS Standard & Target for Initial Supply Time

#	Name	Fixed/ mobile	Description/ Definition	Standard	Target
R11	Initial Supply Time	Fixed	The initial supply time is the period of time between the instant when the supply event is ordered (i.e. the order has been accepted as valid and complete by the network provider) and the instant when the supply is completed.	NA	99% in < 5 calendar days except for FTTH For FTTH 99% in < 15 calendar days
R15	Service Delivery Time	Mobile	The service delivery time for customers is the period between the instant when the registration with identification document and signature of the contract (if applicable) was completed successfully and the instant when the service is available	NA	95 % in <2h

Source: Annex 2 of Service Regulatory Framework by CRA Qatar (2014)
KPIs as set by CRA may not be exactly comparable with customer satisfaction levels, which are based more on over all perceptions

Dissatisfaction on ease of activation/ provisioning is observed to be more prominent among mobile broadband users (23% dissatisfaction), mobile voice (15% dissatisfaction) and fibre broadband (11% dissatisfaction). High dissatisfaction among mobile broadband users could be a perception issue, possibly on account of issues faced in using the dongle/ mi-fi device. Dissatisfaction on other provisioning related parameters among various services users is observed to be minimal i.e. less than 10% (Table 17). Also, dissatisfaction on ease of activation/ provisioning is higher for Vodafone (15% as compared to 10% for Ooredoo).

Table 17: Experience with Provisioning: Type of Service

Experience Area	Overall	Fixed			Mobile			
		Fixed Line	Internet (copper)	Fibre Broadband	Mobile Voice	Mobile Voice+ Mobile Data	Data Specific SIM	Mobile Broadband
Ease of activation/ provisioning	88	93	92	89	85	92	93	77
Sales agent interacted with	98	98	97	99	98	96	97	100
Ease of purchasing the connection	98	97	97	99	98	99	97	100
Initial supply time	96	95	95	91	97	97	91	100
Minimum Service period for the product	97	98	95	98	97	97	94	99

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 18: Experience with Provisioning: By Service Provider

Experience Area	Overall	Ooredoo	Vodafone
Ease of activation/ provisioning	88	90	85
Sales agent interacted with	98	97	97
Ease of purchasing the connection	98	98	99
Initial supply time	96	97	98
Minimum Service period for the product	97	98	97

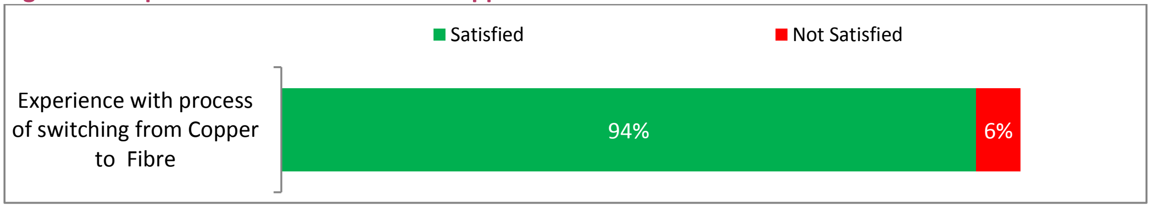
Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Switch from Copper to Fibre

In pursuit of offering new and reliable technology, it is targeted to provide fibre network across all the localities in Qatar by 2015. Ooredoo has been actively migrating customers from the existing Internet (Copper) to Fibre broadband service. Vodafone, on the other hand, has started providing fibre broadband services in some of the locations in Qatar. In line with CRA's objective of ensuring efficient management and allocation of resources, it is pertinent to assess customers' satisfaction with switching experience (from copper to fibre).

A majority of customers (94%) who have experienced the switching process are satisfied with the same (Figure 15). This is a good motivator for the CRA to ensure complete and quick migration from copper to fibre.

Figure 15: Experience with Switch from Copper to Fibre

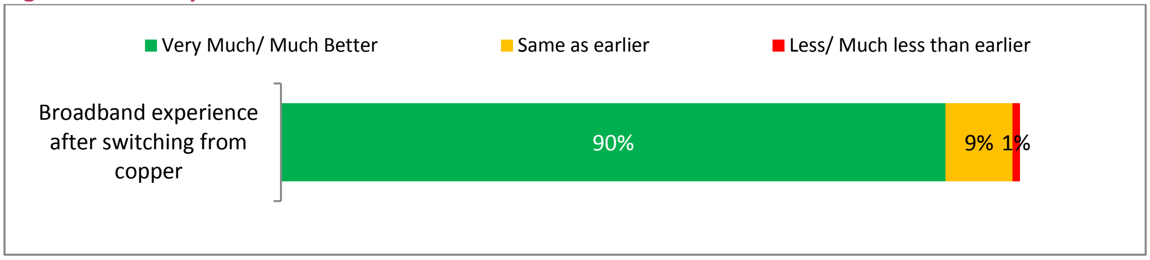


Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who have undergone switching experience (n=258)

Note: Numbers may not add up to 100 percent due to rounding

Among those who have migrated from copper to fibre, 90% of them are satisfied with the quality of broadband post the switch (Figure 16). Only a miniscule 1% of the switchers feel that the quality has declined. A high level of satisfaction with broadband is very encouraging for the growth of Qatar's telecom market.

Figure 16: Quality of Broadband after Switch



Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who have undergone switching experience (n=258)
Note: Numbers may not add up to 100 percent due to rounding

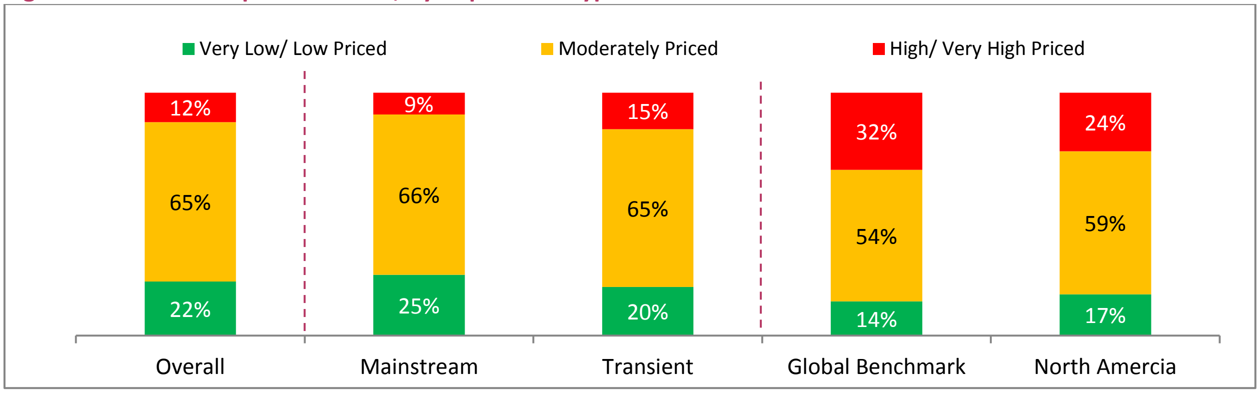
Pricing and Tariffs/ Rate Plans

One of the key mandates for CRA is to ensure that individual consumers have an access to communications services at affordable prices. It is thus pertinent to understand consumers' perception about pricing of telecom services, their experience with tariffs offered and MNP (Mobile Number Portability) plan in particular.

Price Perception

At an overall level, only about 1/5th (22%) of consumers believe the telecom services in the State of Qatar to be low or very low priced. 12% of the consumers (in particular 25-44 year olds, Males and non-Qataris) believe they are paying high/ very high prices for services rendered by the operators. Transient population perceives the services to be more highly priced as compared to that perceived by mainstream population (Figure 17).

Figure 17: Price Perception: Overall, By Population Type and Walker Benchmarks

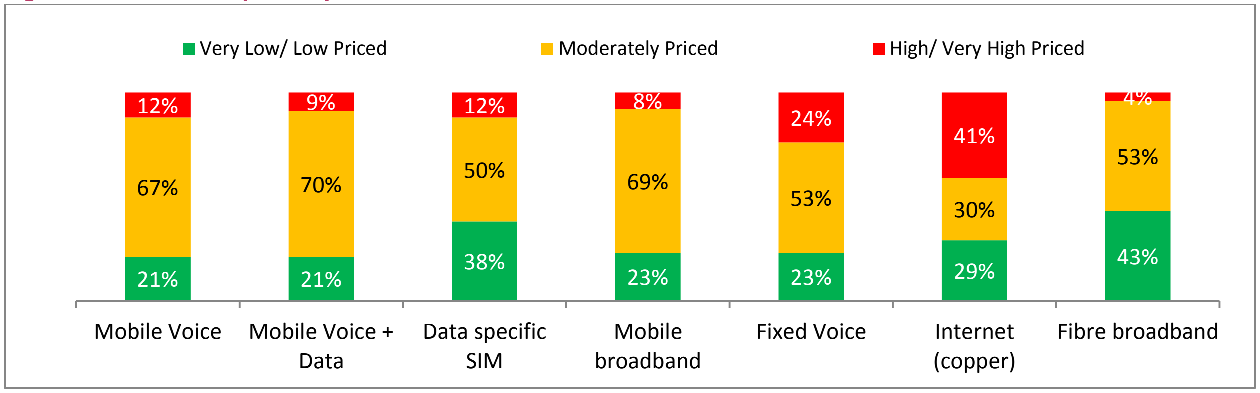


Source: Customer Satisfaction Survey; Overall sample n=2526
Benchmark is from Walker Stakeholder Relationship Database
Note: Numbers may not add up to 100 percent due to rounding

Dissatisfaction on pricing is particularly higher among fixed service consumers, such as Internet (Copper) and fixed voice users. Higher price perception for fixed voice is influenced by the International call charges, Value added services and local charges. A similar pricing package for 'Copper' and 'Fibre' is probably leading to discontent among 'copper' customers. Among mobile services, high dissatisfaction on pricing is observed among mobile voice and data SIM users (Figure 18).

Pricing of mobile, fixed voice and fibre broadband services in Qatar are observed to be relatively better vis-à-vis that in Australia and Singapore (Table 19).

Figure 18: Price Perception by Service



Source: Customer Satisfaction Survey; Overall sample n=2526

Note: Numbers may not add up to 100 percent due to rounding

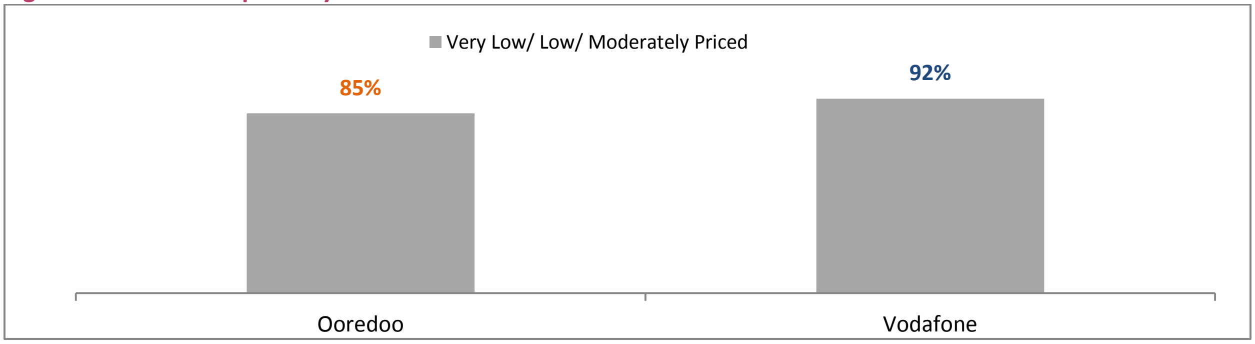
Table 19: Price Perception: Country-wise Benchmarks

Services	Qatar	UK	Australia	Singapore*	UAE
Mobile Voice	88	NA	72	64	NA
Mobile Voice+ Data	91	NA	63#	61**	NA
Data Specific SIM	86	NA	NA	NA	NA
Mobile Broadband	89	NA	NA	NA	NA
Fixed Voice	89	NA	72	70	NA
Internet (Copper)	55	NA	NA	NA	NA
Fibre Broadband	96	NA	63#	64	NA

Figures above for Qatar represent Very Low/ Low/ Moderately Priced
Figures for Australia represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
**Singapore benchmarks are calibrated from Mean*
*** Mobile Broadband number*
 # Only Internet has been mentioned instead of Mobile Broadband and Fixed Broadband

Across the two operators, Ooredoo consumers in particular find the pricing to be higher (Figure 19).

Figure 19: Price Perception by Service Provider



Source: Customer Satisfaction Survey; Overall sample n=2526

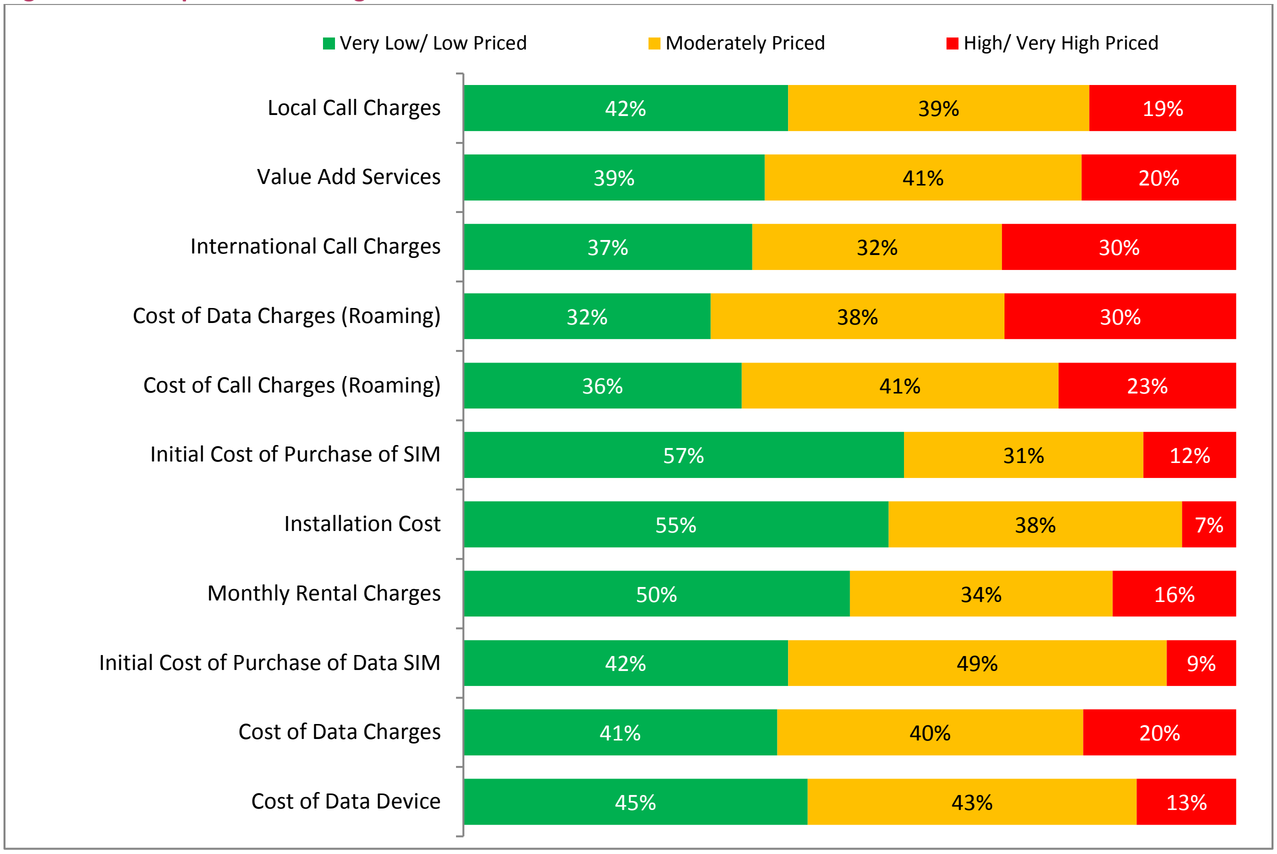
Around 20% of the consumers perceive the charges for various services to be highly priced. International calling and roaming charges, in particular are perceived to be expensive (Figure 20). Consumers' opinion about high pricing is observed to be quite similar across various product lines (Table 20) and also for both Ooredoo and Vodafone (Table 21).

The low perception about prices of telecom services in Qatar could also be on account of the impact of OTT (Over The Top) services (Both Voice and Text). The existing international research on the possible influence suggests that OTT voice can be considered as a competition to voice, though there are certain factors which can impact the same. Some of these factors are:

- Strong, widespread indoor coverage of data
- Ubiquitous and interoperable apps in a large share of smartphones
- Longer- lasting batteries that can handle power drain caused by active apps

There probably is a need for more global and regional research on this topic, before anything conclusive can be proclaimed.

Figure 20: Perceptions on Pricing Attributes



Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers
Note: Numbers may not add up to 100 percent due to rounding

Table 20: Perception on Pricing Attributes: Type of Service

Pricing Attributes	Overall	Fixed			Mobile			
		Fixed Line	Internet (copper)	Fibre broadband	Mobile Voice	Mobile Voice+ Mobile Data	Data Specific SIM	Mobile broadband
Local call charges	81	81	NA	NA	81	81	NA	NA
Value Add Services	80	80	44	92	80	78	93	95
International Call Charges	70	73	NA	NA	69	69	NA	NA
Cost of Data Charges (Roaming)	70	NA	NA	NA	NA	68	71	74
Cost of Call Charges (Roaming)	77	NA	NA	NA	78	76	NA	NA
Initial Cost of Purchase of SIM	88	NA	NA	NA	87	89	NA	NA
Installation Cost	93	92	86	93	NA	NA	NA	NA
Monthly Rental Charges	84	82	83	NA	95	75	NA	NA
Initial Cost of Purchase of Data SIM	92	NA	NA	NA	NA	NA	92	NA
Cost of Data Charges	80	NA	45	96	NA	79	87	89
Cost of Data Device	86	NA	NA	NA	NA	NA	NA	86

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 21: Perception on Pricing Attributes: Type of Service

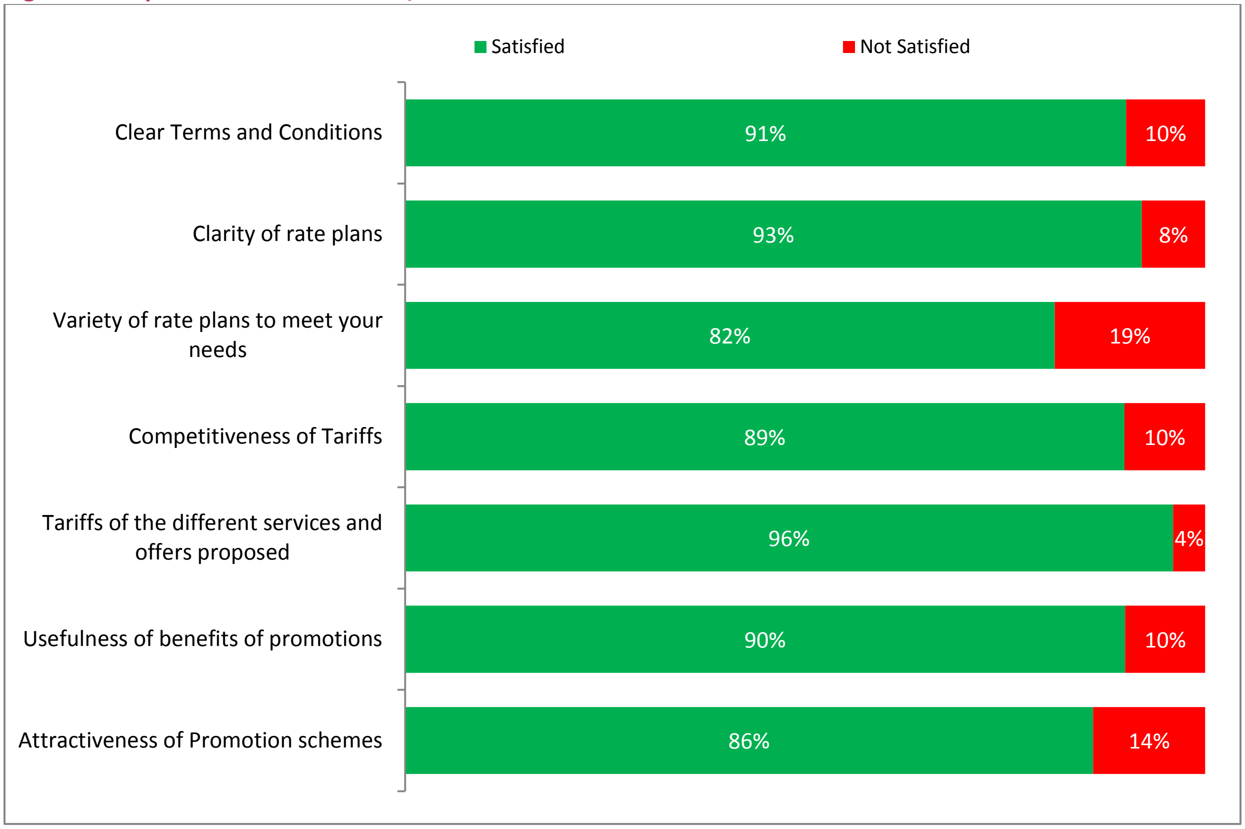
Pricing Attributes	Overall	Ooredoo	Vodafone
Local call charges	81	80	81
Value Add Services	80	79	83
International Call Charges	70	70	68
Cost of Data Charges (Roaming)	70	72	67
Cost of Call Charges (Roaming)	77	76	79
Initial Cost of Purchase of SIM	88	88	88
Installation Cost	93	92	92
Monthly Rental Charges	84	87	78
Initial Cost of Purchase of Data SIM	92	91	91
Cost of Data Charges	80	80	82
Cost of Data Device	86	91	80

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Customer Experience with Rate Plans/ Tariffs and Promotions

While consumers are satisfied with clarity of rate plans, around 20% consumers are dissatisfied on ‘variety of rate plans’, which is a cause of concern for the telecom sector in Qatar. In terms of promotions, while 90% of the consumers find the promotional benefits of use, there are 14% of the consumers who don’t find the promotional schemes to be attractive (Figure 22).

Figure 21: Experience with Rate Plan/ Tariff and Promotions Sub-Attributes



Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers
Note: Numbers may not add up to 100 percent due to rounding

In contrast to high satisfaction among fibre broadband users, Internet (Copper) users are quite dissatisfied (around 45% average dissatisfaction across parameters) with rate plans/ tariffs offered (Table 22). This is probably on account of similar tariff structure for both copper and fibre services. Dissatisfaction on 'variety of rate plans' is particularly higher among mobile broadband and mobile voice/ data users. Mobile broadband users also do not find the promotion schemes to be attractive.

Dissatisfaction on 'variety of rate plans' is observed to be high (Around 20% dissatisfaction) among both Ooredoo and Vodafone customers (Table 23).

Table 22: Experience with Rate Plan/ Tariff and Promotions: Type of Service

Rate Plan/ Tariff and Promotions	Overall	Fixed			Mobile			
		Fixed Line	Internet (copper)	Fibre broadband	Mobile Voice	Mobile Voice+ Mobile Data	Data Specific SIM	Mobile broadband
Clear Terms and Conditions	91	91	56	95	91	92	91	91
Clarity of rate plans	93	91	57	98	93	93	93	97
Variety of rate plans to meet your needs	82	87	55	94	81	83	90	71
Competitiveness of Tariffs	89	89	59	96	91	89	89	95
Tariffs of the different services and offers proposed	96	92	59	97	96	97	94	99
Usefulness of benefits of promotions	90	90	58	96	90	91	91	89
Attractiveness of Promotion schemes	86	86	56	96	87	87	88	76

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 23: Experience with Rate Plan/ Tariff and Promotions: Service Provider

Rate Plan/ Tariff and Promotions	Overall	Ooredoo	Vodafone
Clear Terms and Conditions	91	91	90
Clarity of rate plans	93	91	93
Variety of rate plans to meet your needs	82	83	80
Competitiveness of Tariffs	89	89	91
Tariffs of the different services and offers proposed	96	95	97
Usefulness of benefits of promotions	90	90	90
Attractiveness of Promotion schemes	86	87	85

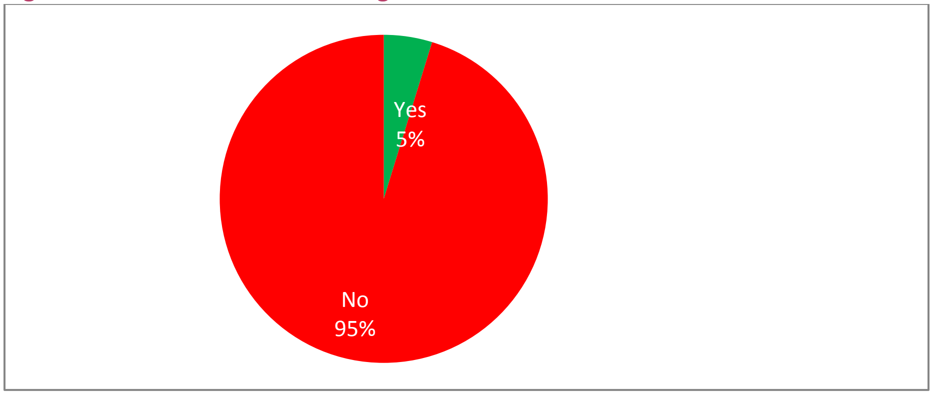
Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Publishing of Tariff

Tariff publishing by the service providers is an important regulatory requirement from CRA. This is done so as to ensure fair tariffs by service providers and also to discourage hidden costs.

Presently, only 5% of the consumers are aware of the fact that CRA is mandated to get tariffs published by the service providers (Figure 22). There is a critical need to enhance this awareness among consumers.

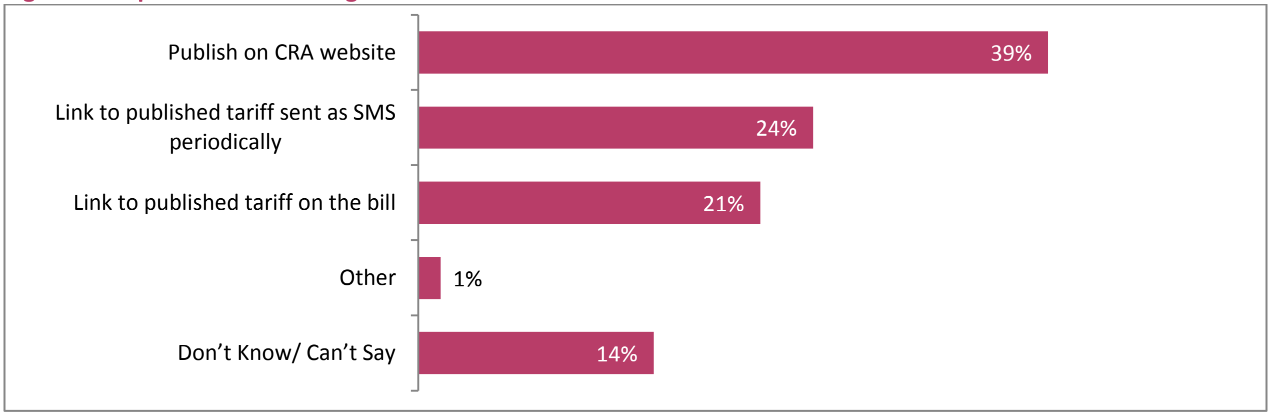
Figure 22: Awareness of Publishing Tariff



Source: Customer Satisfaction Survey; Overall sample n=2526

Among the consumers who are aware of the tariff publishing requirement by CRA, no clear preference is being suggested by the consumers. While around 40% of consumers would prefer tariffs to be published on CRA website, around 1/5th (24%) of the consumers want the link (to published tariff) to be sent as an SMS on a periodic basis (Figure 23).

Figure 23: Options for Accessing Published Tariff



Source: Customer Satisfaction Survey; Overall sample n=2526
Question asked specifically to those aware of requirement to publish tariff (n=127)

Mobile Number Portability (MNP) Experience

Ministry of Information and Technology (ictQATAR) launched Mobile Number Portability in Qatar in the year 2013 (effective launch on 31st January 2013[3]). It allows mobile customers of Ooredoo and Vodafone Qatar to retain their existing mobile number when they switch service providers. This service has been launched in Qatar to induce further competition and help liberalize the telecommunications sector.

Around 1/3rd of the consumers are presently aware of the MNP service. Among those aware of the same, around 1/10th (9%) have availed themselves of the service (Table 24). There is thus a scope to enhance the awareness and usage of MNP service.

[3] http://www.ictqatar.qa/en/news-events/news/mobile-number-portability-services-rollout-qatar

It is further observed that 28% of consumers who have availed of MNP are dissatisfaction with the process. There is thus a need to make the process customer friendly (Figure 24).

Some of the verbatim comments from customers regarding their number portability experience are given below:

> *"I did change my fancy Vodafone number to Ooredoo but the process took too long. I wanted to go back to Ooredoo for better network, but I think this long process is not good"* ***(Qatari Male 18-25 years)***

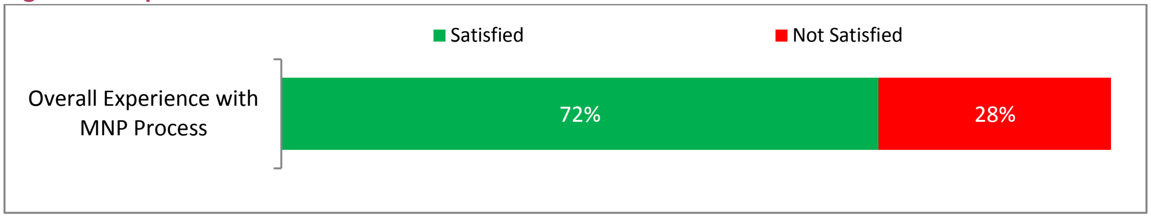
> *"My mother changed number to Vodafone and it was long process…I don't think she liked that it took so long"* ***(Arab female, 25-35 years)***

Table 24: Mobile Number Portability: Awareness and Subscription

Mobile Number Portability	Proportion of Consumers
Awareness	**32%**
Availed of the Service (Among those aware)	**9%**

Figures above represent proportion (%) of consumers aware/ availed of the service
Source: Customer Satisfaction Survey; Overall sample n=2526

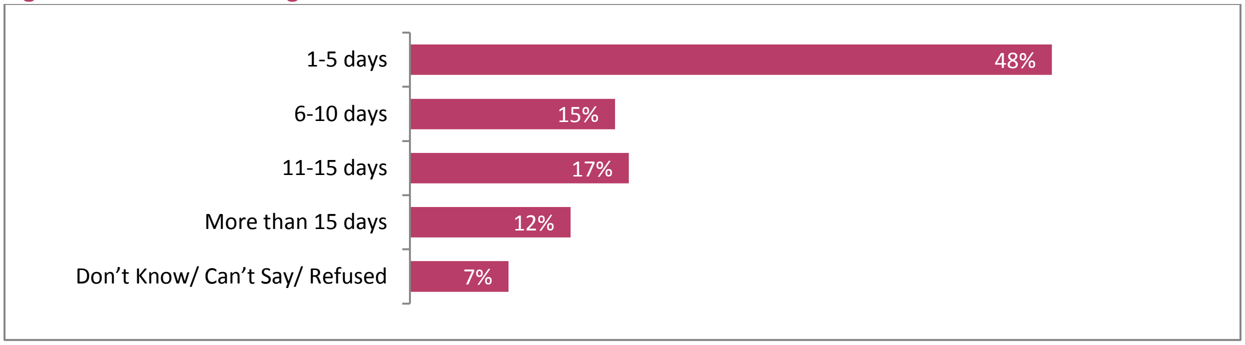
Figure 24: Experience with MNP



Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who have availed the service (n=79)
Note: Numbers may not add up to 100 percent due to rounding

One of the reasons for dissatisfaction could be the time taken for porting, with more than half the customers who availed of the service claiming it to have taken more than 5 days (Figure 25). There is a need to have stringent SLAs in place and regular audits to ensure compliance with the same.

Figure 25: Time for Porting

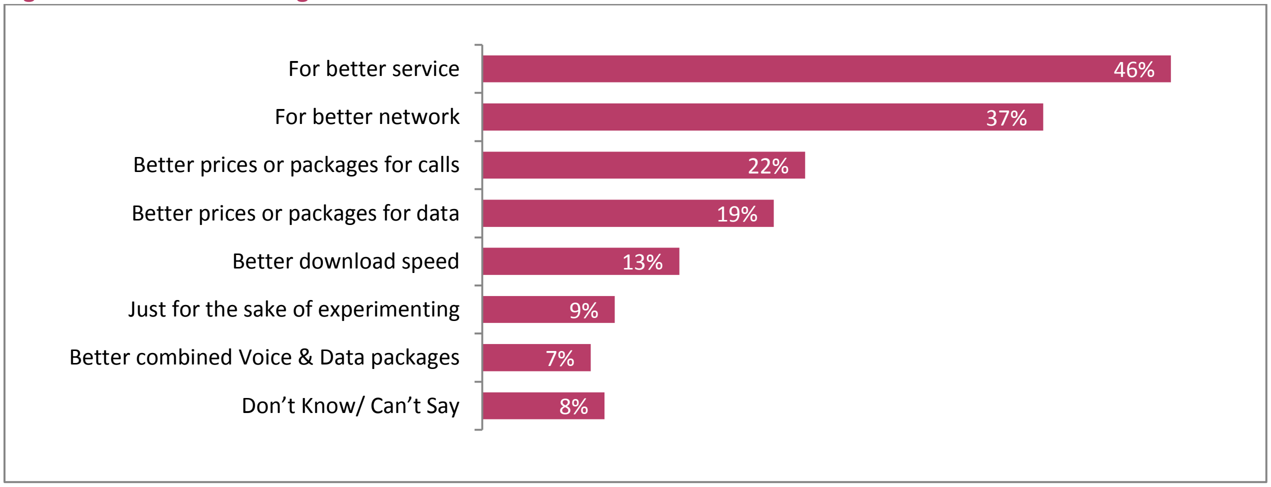


Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who have availed the service (n=79)

The key reasons for usage of MNP service are on account of better services (46% incidence) followed by network (37%) and pricing (Figure 26).

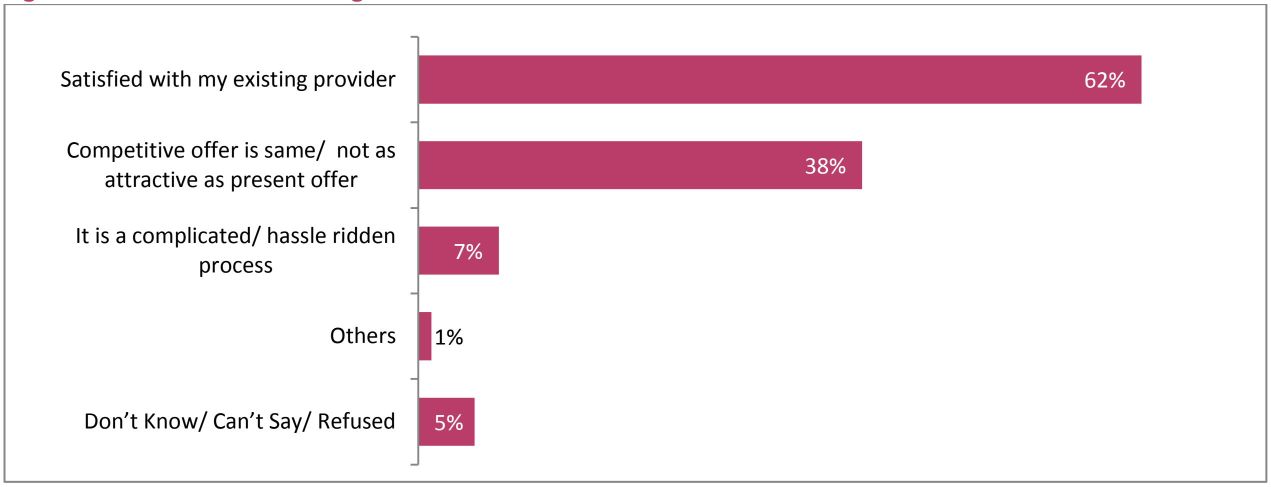
On the other hand, the two key reasons cited by non-users of MNP are related to satisfaction with existing operator (62%) followed by a lack of attractive competitive offer (38%). Interestingly, non-users of the service don't perceive the process to be complicated, which is not the case with actual users of the scheme (Figure 27).

Figure 26: Reasons for Usage of MNP



Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who have availed the service (n=79)

Figure 27: Reasons for Not Using MNP



Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who have not availed of the service (n=946)

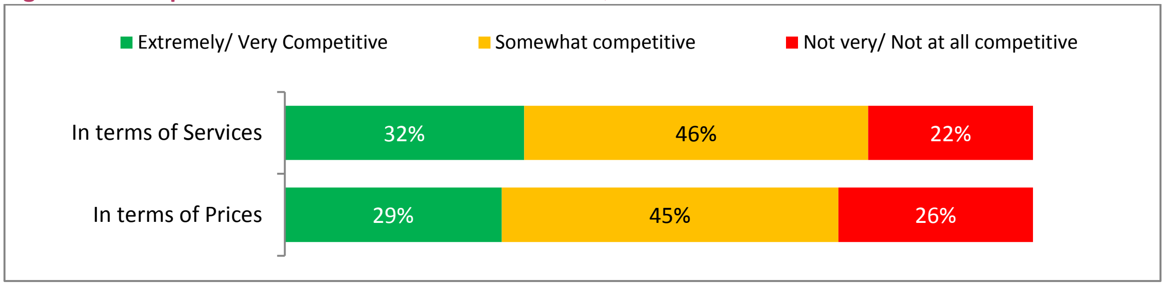
Market Competitiveness: Services and Prices

The telecom market in Qatar has been continuously evolving with introduction of new technologies so as to provide high quality services at competitive prices to end-users in the State of Qatar. Further, CRA strives to ensure that the interests of consumers are protected by promoting a healthy competition in the market.

It is observed that only about 1/3rd of the consumers perceive the telecom services provided in Qatar to be extremely/ very competitive. This is also evident in consumer perceptions with regards to pricing competitiveness of Qatar's telecom market, wherein only about 30% of consumers feel it to be very competitive and 1/4th of them perceive it to be not competitive (Figure 28).

Further, dissatisfaction with pricing competitiveness is also reflected in reduction in overall 'Network Readiness Index' rank for Qatar from 23 in 2014 to 27 in 2015 (Refer: GITR Report 2015; Figure 29). It is primarily on account of higher tariffs (more so Internet related), where Qatar ranks at the bottom.

Figure 28: Competitive Nature of Telecom Market in Qatar



Source: Customer Satisfaction Survey; Overall Sample n=2526
Note: Numbers may not add up to 100 percent due to rounding

Figure 29: Network Readiness Index, 2015

	Rank (out of 143)	Value (1–7)
Networked Readiness Index 2015	**27**	**5.1**
Networked Readiness Index 2014 (out of 148)	23	5.2
Networked Readiness Index 2013 (out of 144)	23	5.1
A. Environment subindex	**15**	**5.3**
1st pillar: Political and regulatory environment	17	5.3
2nd pillar: Business and innovation environment	16	5.3
B. Readiness subindex	**56**	**5.0**
3rd pillar: Infrastructure	29	5.7
4th pillar: Affordability	126	3.1
5th pillar: Skills	5	6.3
C. Usage subindex	**17**	**5.4**
6th pillar: Individual usage	19	6.0
7th pillar: Business usage	25	4.6
8th pillar: Government usage	5	5.5
D. Impact subindex	**27**	**4.8**
9th pillar: Economic impacts	32	4.0
10th pillar: Social impacts	10	5.6

4th pillar: Affordability		
4.01 Prepaid mobile cellular tariffs, PPP $/min.	54	0.22
4.02 Fixed broadband Internet tariffs, PPP $/month	123	80.47
4.03 Internet & telephony competition, 0–2 (best)	126	0.93

Source: The Global Information Technology Report 2015

On probing, consumers are vocal in terms of their suggestions to enhance the competitive nature of the market. One of the key suggestions is introduction of further competition in market. This includes second player in fixed line services *(Currently, Vodafone being present only in very few pockets for Fixed line services)* and a third player in mobile segment. Apart from this, consumers also desire for *better* *services at affordable rates*, *better Internet facilities* (in terms of reduced prices and higher speeds) and *protection of consumers rights & interests (related to call charges, incorrect deductions etc.).*

> *"When Vodafone was introduced there was huge competitive spirit, now I think there is lethargy in the system"* ***(Qatari Male 18-25 years)***

> *"I think it is essential to have 3 players in the market. It would add a new vigor to the market. But I don't know if 3 players can sustain. It should not kill competition"* ***(Western male, 25-35 years)***

> *"…competition in fixed service- you are joking. There is only 1 service and it would be one service only for long time. I don't think Vodafone wants to enter fixed services"* ***(Arab male, 35-45 years)***

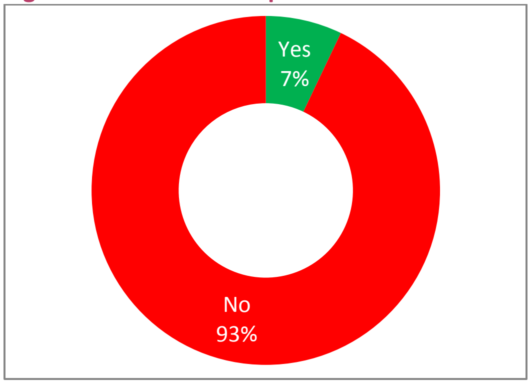
Complaint Resolution Mechanism

Last, but not the least, CRA's mandate is to manage a dispute resolution system that is transparent, fair, speedy, and effective. It is thus essential to understand various modes used by consumers to lodge complaints, their experience with the resolution system and awareness & usage of escalation mechanism.

Incidence, Reasons & Modes Used for Raising Complaints

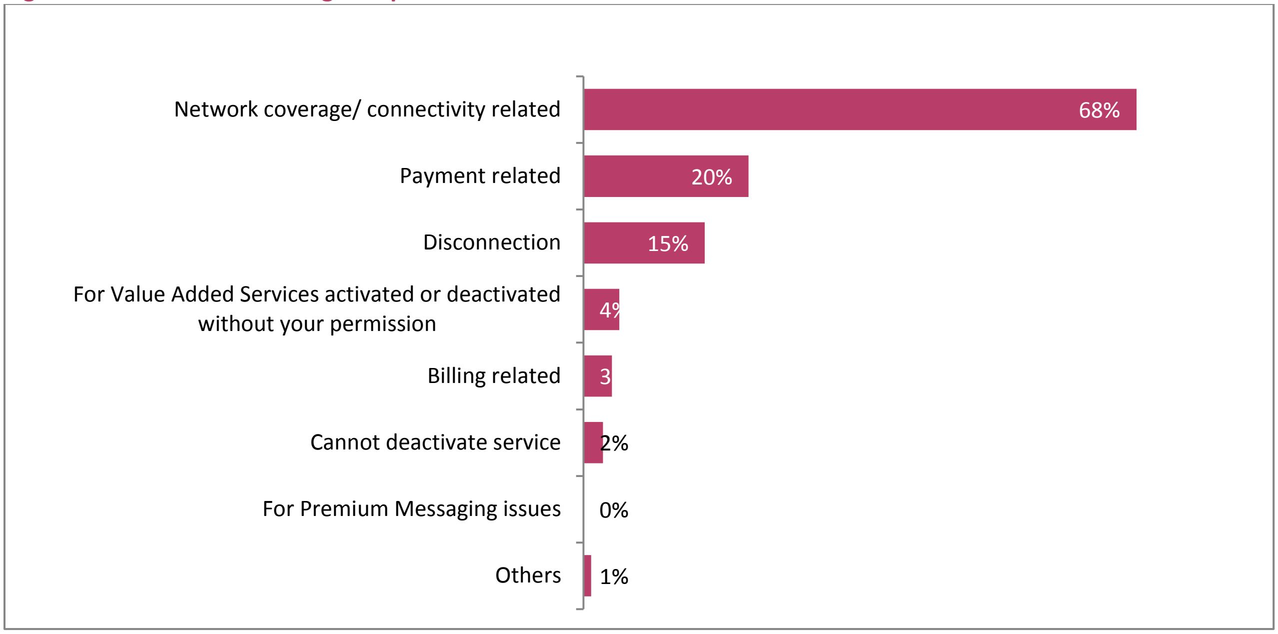
It is observed that only about 7% customers have raised a complaint with their service provider in past 6 months (Figure 30). The percentage of customers raising complaints in the last 6 months for Vodafone is slightly higher (8%) compared to Ooredoo (6%). Among those who have raised a complaint, More than 2/3rd (68%) of complaints raised are related to 'network coverage/ connectivity related issues'. Apart from this, some complaints are also related to payment and disconnection related issues (Figure 31). This is slightly higher for Vodafone (78%) as compared to Ooredoo (62%) indicating slightly higher issues of network related among Vodafone customers.

Figure 30: Raised a Complaint in Past 6 Months



Source: Customer Satisfaction Survey; Overall sample n=2526
Note: Numbers may not add up to 100 percent due to rounding

Figure 31: Reasons for Raising Complaint

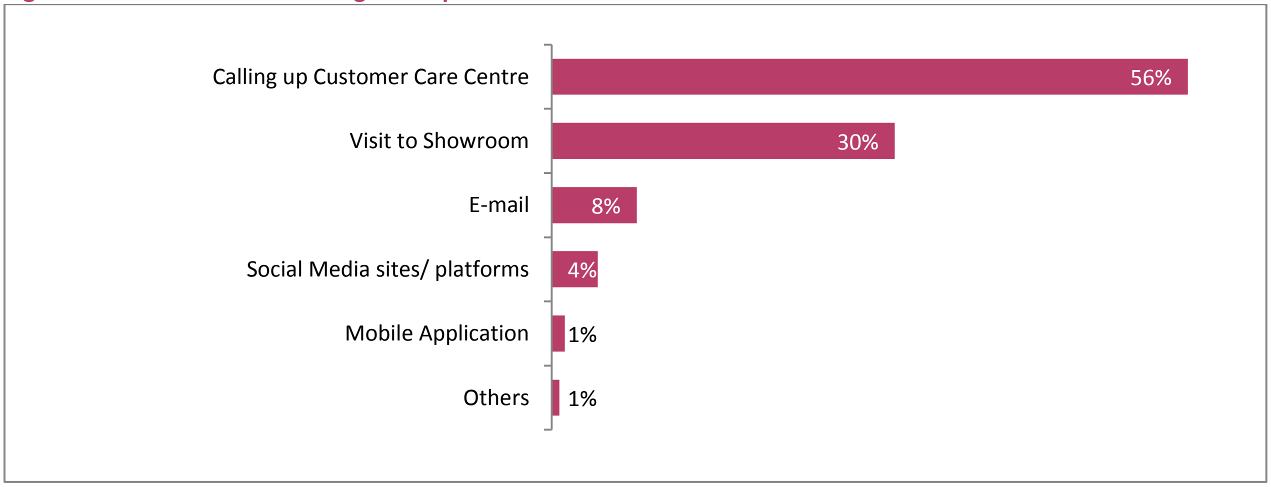


Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who have raised a complaint in past 6 months (n=235)

More than half (56%) of those who raised a complaint called up customer care center for the same (Figure 32). Visit to company outlet is also used as a mode by 30% of the customers who raised a complaint. While some consumers do raise complaint via e-mail, there is very minimal proportion of customers who use other means of raising complaints {such as social media, Qatar government call center (Hukoomi), Mobile apps by service providers, Mobile app by CRA (Arsel) etc.}.

There is thus a significant scope to encourage use of online modes (e-mail, mobile application and social media) to lodge complaints. However, this needs to be backed-up by adequate and swift action so that there is no gap between expectations and reality.

Figure 32: Usual Mode of Raising a Complaint



Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who have raised a complaint in past 6 months (n=235)

Alternate Modes for Complaint registration

Apart from the traditional modes of raising a complaint (Such as operator's call center, company outlet), consumers in Qatar have alternate options for raising complaints related to telecom services. Three such modes of complaint registration are:

1. Feedback through Arsel *(Mobile application by CRA)*
2. Complaints raised through Hukoomi *(Qatar Government Call Center)*
3. Complaints through Social Media *(Platforms managed by Service Providers)*

Feedback/Complaints through Arsel

Arsel is a mobile application developed by CRA to empower telecom consumers in Qatar. The app was specifically developed by CRA's Consumer Affairs Department as an additional tool for consumers to provide their feedback about telecommunication services in Qatar directly to the CRA. The data collected through the app helps CRA to work with the service providers to improve the quality of services in the State of Qatar.

As mentioned earlier, the incidence of providing feedback via this mode is quite minimal. In 2014, a total of 188 for Ooredoo and 165 for Vodafone issues were raised through Arsel (Table 25). An analysis of the feedback reveals that 'network' related issues account for a major chunk of feedback, which is similar to what has been noticed at service providers' call centers. Further in-depth analysis indicates that poor indoor coverage is the key issue with network, followed by 4G/ 3G coverage (Table 83 in Appendix XIV).

Other key issues include those related to broadband (Fibre optic and Mobile broadband).

Table 25: Feedback through Arsel: Feedback Type By Service Provider

Feedback Type	Ooredoo	Vodafone
Network	44%	50%
Fiber Optic	18%	8%
Mobile Broadband	9%	8%
ADSL	8%	4%
Calls	5%	11%
Messages	5%	4%
Promotions	4%	6%
Billing/Charges	3%	5%
Landline Calls	3%	
Others	2%	4%
Total Number of Feedbacks	**188**	**165**

Source: Arsel data provided by CRA

Complaints through Hukoomi

Hukoomi is the Qatar Government Contact Center that includes call center team for the CRA as a first line of support for the telecom consumer complaints through hotline (#103).

In 2014, there were 447 complaints raised by Ooredoo and 505 by Vodafone end-users through Hukoomi (Table 26). While ADSL accounts for majority of complaints raised by Ooredoo users, mobile related complaints are the prominent ones for Vodafone.

Table 26: Complaints through Hukoomi on Network: Type of Complaints- By Service Provider

Complaint Type	Ooredoo	Vodafone
ADSL	43%	4%
Fiber	12%	0%
MNP	4%	5%
Mobile	41%	91%
Total Number of Complaints	**447**	**505**

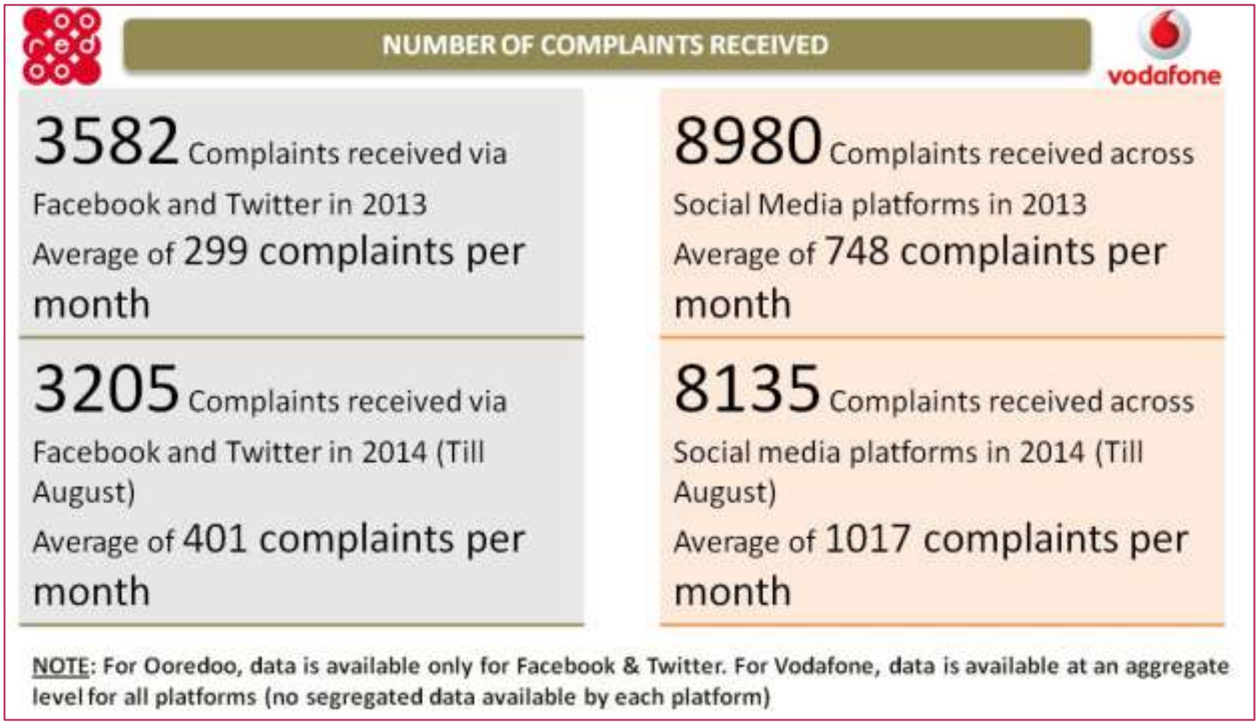
Source: Hukoomi data provided by CRA

For Ooredoo, while installation/ activation were observed to be the key issues with ADSL; billing and unauthorized disconnections were the key issues with mobile (Table 84 in Appendix XIV). For Vodafone also, majority of mobile complaints were related to unauthorized disconnections. Comparing the absolute numbers, Vodafone seems to have higher number of complaints registered for unauthorized disconnection (239 for Vodafone as against only 38 for Ooredoo).

Complaints through Social Media

The service providers are actively listening to their consumers on social media and they are also entertaining complaints on various social media sites for better customer engagement (Figure 33). Service providers are also actively investing in new technologies to continuously listen to consumers on various social platforms to provide best possible engagement. The operators are embracing social media for not just brand building activities but also as a way to listen to the telecom consumers in Qatar.

Figure 33: Complaints Received on Social Media

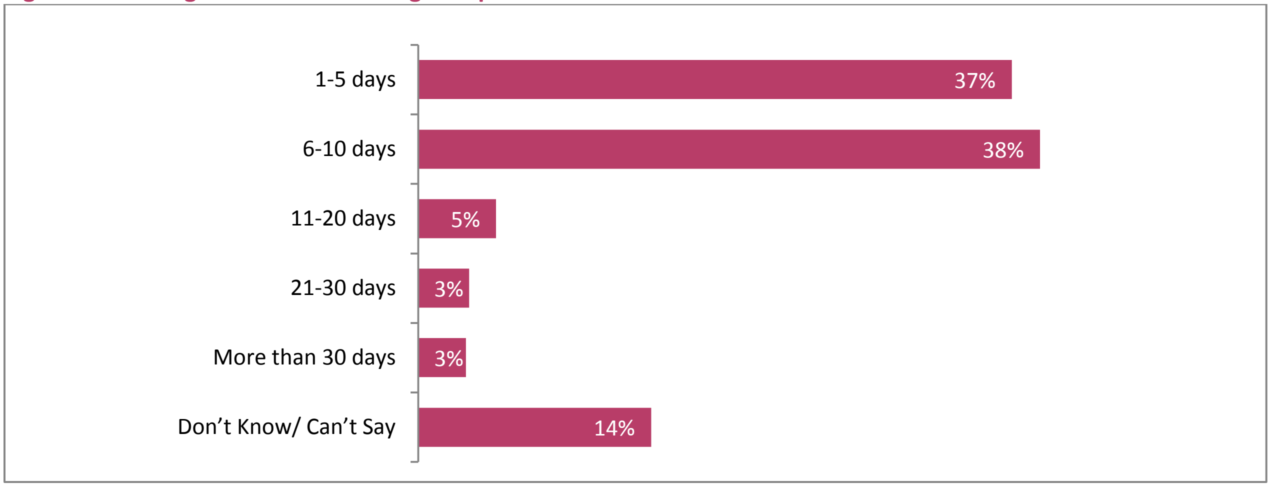


Source: Data from Service Providers

Complaint Resolution: Time Taken & Experience

At an overall level, only 37% of customers claim that their complaints were resolved within 5 days of registering the same (Figure 34). This is especially low for Vodafone (only 19% resolved within 5 days). Given that the target as per CRA's Service Regulatory Framework 2014 is to resolve 95% of complaints within 5 working days (Table 27) for both mobile and fixed services, the existing customer experience with complaint is observed to be quite weak.

Figure 34: Average Time for Resolving Complaints



Source: Customer Satisfaction Survey; Overall sample n=2526

Question specifically asked to those who have raised a complaint in past 6 months (n=235)

Table 27: CRA KPIs for Service Providers: QoS standard and Target for Customer Complaint Resolution

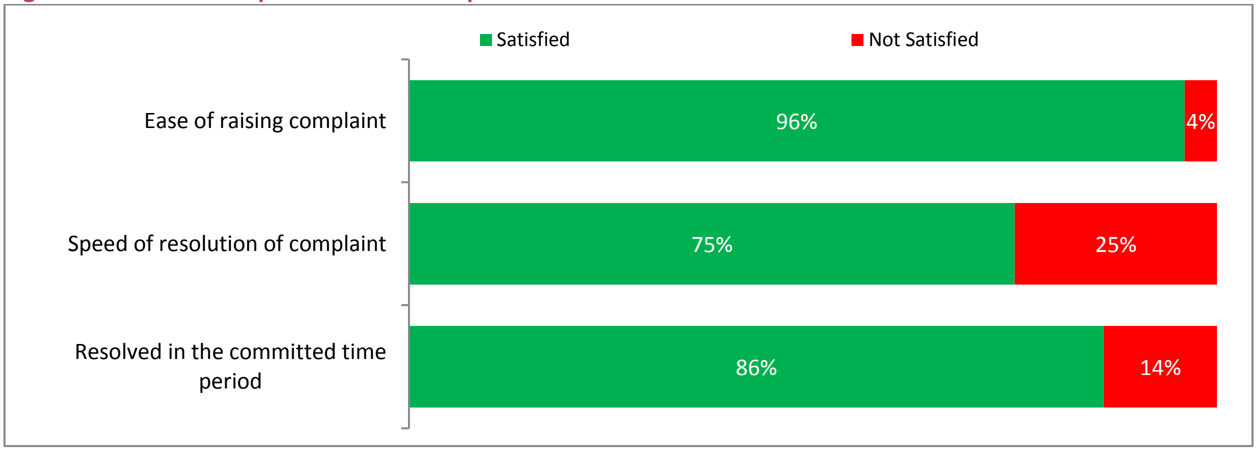
#	Name	Fixed/ mobile	Description/ Definition	Standard	Target
R1	Time to Resolve customer complaints	Both mobile and fixed	This parameter assesses the period between the instant when a customer complaint is notified to the Service Provider and the instant the cause for the complaint has been resolved.	E1 5.10	95% in < 5 working days

Source: Annex 2 of Service Regulatory Framework by CRA Qatar (2014)

As mentioned earlier, time taken to resolve the complaints is quite high in majority of the cases. As a consequence of the same, there is a huge dissatisfaction (25%) on the speed of complaint resolution. High dissatisfaction (14%) is also observed on the resolution within committed time period. This indicates that while the customer care executives are committing time period as required, same is not adhered to (Figure 35).

It is further observed that while speed is a bigger cause of dissatisfaction among Ooredoo consumers (29% dissatisfaction), resolution within committed time period is a cause of concern (19% dissatisfaction) among Vodafone users (Table 28).

Figure 35: Customer Experience with Complaint Resolution Process



Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who have raised a complaint in past 6 months (n=235)
Parameters are arranged in order of importance to consumers
Note: Numbers may not add up to 100 percent due to rounding

Table 28: Experience with Complaint Resolution Process: Service Provider

Complaint Resolution Process	Overall	Ooredoo	Vodafone
Ease of raising Complaint	96	92	100
Speed of Resolution of complaint	75	71	80
Resolved in the committed time period	86	92	81

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

However, there are some positive comments also by customers with regards to their experience with complaint resolution process.

"I usually call the call center for all my complaints. It is very easy to do from mobile or landline and you know it will be attended to." ***(Arab Male, 35- 45 years)***

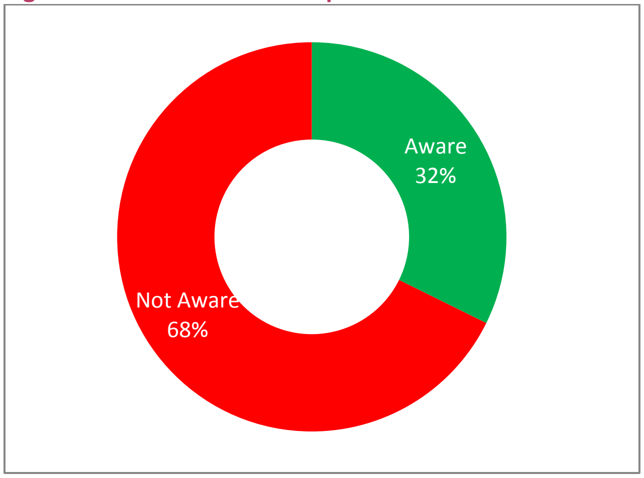
"Communication wise, employees listen to you. Resolving issue might be longer, but staff is very polite." ***(Westerner Male, 25- 35 years)***

Complaint Resolution Escalation Process

CRA has established a complaint resolution escalation process wherein customers can escalate their complaints to CRA if the issue is not resolved by their service provider.

Presently, only about 1/3rd (32%) of the consumers are aware of the escalation process for getting their complaints resolved (Figure 36). There is thus a clear need for CRA to improve the awareness of escalation process among consumers and thus effectively address consumer issues.

Figure 36: Awareness of Complaint Resolution Escalation Process



Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who have raised a complaint in past 6 months (n=235)
Note: Numbers may not add up to 100 percent due to rounding

Consumer Rights Protection

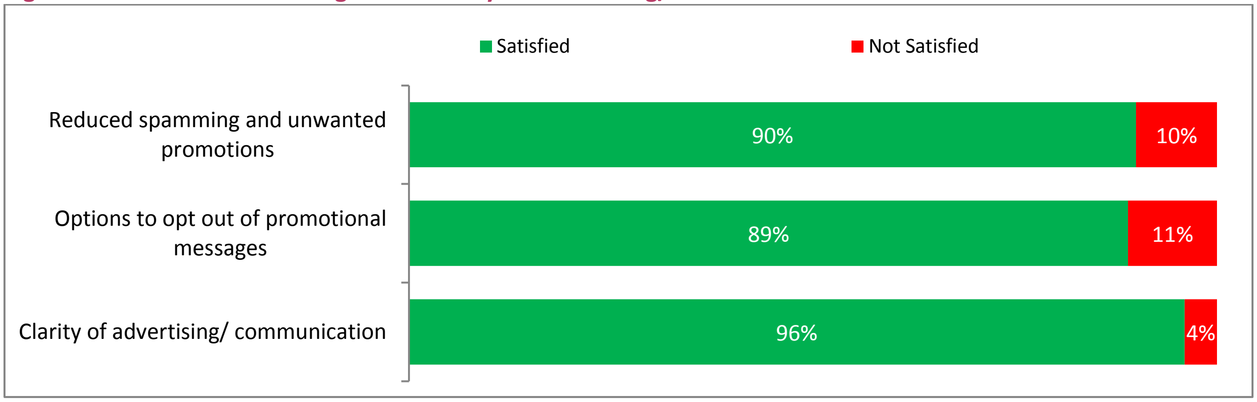
CRA is mandated to protect telecom consumers from misleading and unfair practices adopted by service providers. This includes aspects such as unwanted promotions/ spamming, options to opt out of such messages, misleading messages and also protection of consumer health from exposure to EMF (Electromagnetic Fields) radiations.

More than 90% of the consumers are satisfied with reduced spamming and clarity of advertising/ communication by the service providers (Figure 37). Further, there is hardly anyone who has felt the communication from service providers to be misleading (Figure 38). The very few who found the promotions to be misleading talk about the inconsistency in rate plans (Between as informed by service provider initially v/s as mentioned in the promotional message).

On the other hand, 11% of the consumers are dissatisfied with options provided by service providers to opt out of promotional messages (Figure 37). This indicates that there is a need for service providers to strictly adhere to guidelines issued by CRA with regards to advertising/ promotions. One of the customers has stated thus:

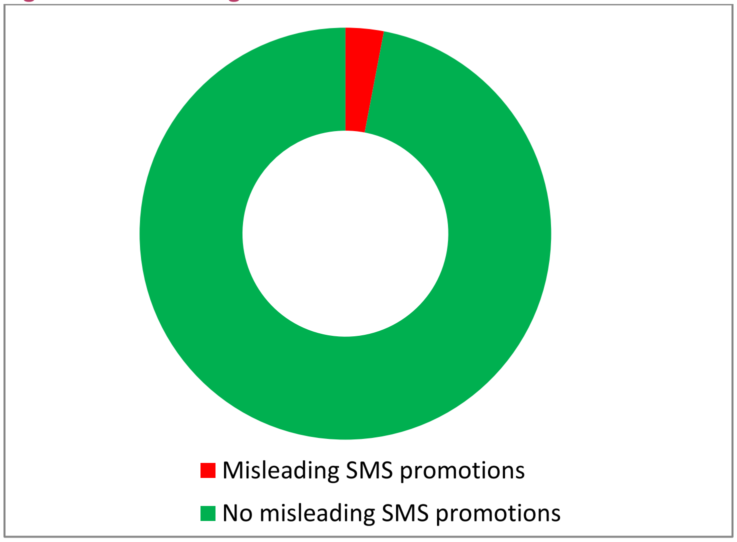
> *"There are some issues in telecom in Qatar, particularly about mobile. You receive these continuous promotion messages. I do not know how to unsubscribe and also they are in Arabic which I do not understand"* ***(25-35 year old Western Male)***

Figure 37: Promotional Messages and Clarity of Advertising/ Communication



Source: Customer Satisfaction Survey; Overall sample n=2526
Note: Numbers may not add up to 100 percent due to rounding

Figure 38: Misleading SMS Promotion



Source: Customer Satisfaction Survey; Overall sample n=2526

As mentioned earlier, CRA has issued guidelines which include protection of public from exposure to Electromagnetic Fields (EMF) radiations within the frequency range of cellular mobile services.

The research indicates that 1/4th of the telecom service consumers in the State of Qatar have heard of health concerns arising from EMF radiations from mobile towers (Figure 39).

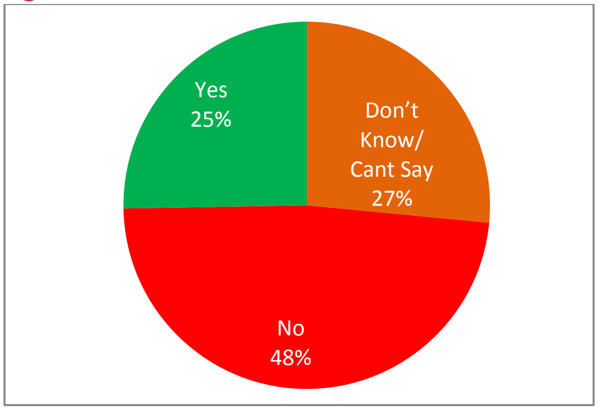
Some of the comments from customers regarding their thoughts on EMF are given below:

> *"I have heard that if you use the mobile for a long time, it causes cancer"* ***(Qatari Male 18-25 years)***

> *"The network towers do influence the environment and it is best not to live close to the towers. I think there is truth to it, but I think telecom companies have taken this into consideration"* ***(Western male, 25-35 years)***

> *"I have heard that birds are dying because of the network towers and I think there should be distance between the network tower and residential area"* ***(Asian Male, 35- 45 years)***

Figure 39: Heard of EMF Concerns



Source: Customer Satisfaction Survey; Overall sample n=2526

On a positive note, this doesn't translate into the consumers raising any concern on the same either to regulatory authority or to their service provider.

Some of the comments from customers regarding raising their concern around EMF are given below:

> *"…they are still working on the research to check if this is cause of concern and that mobile, towers and transmission impact needs to be understood. So I would not complain to authorities"* **(Western male, 25-35 years)**

> *"We have not yet complained, but there are lots of videos in YouTube about these environmental hazards. Someone needs to verify"* ***(Asian female, 25-35 years)***

Service Providers: Customer Loyalty, Brand Image Perceptions and Experience with Key Touch-points

Apart from the impact that consumers' opinions and experience have on CRA's mandate for the telecom sector in the State of Qatar, it is also important to understand how the service providers are faring on aspects, which are of specific relevance to them. Some of these aspects are related to customer loyalty (a long term indicator of business success), brand image perceptions (as strong image perceptions tend to lead to stronger customer loyalty) and customers' experience with some of the key touch-points (such as company outlet, customer care center, social media and connection specific experiences such as recharge/ top-up for prepaid users and billing/ payment for postpaid users).

An understanding of these aspects would help lay out clear action roadmap for the two service providers.

Customer Loyalty

Loyalty captures customers' perceptions and attitudes about a particular brand or service, including whether or not they intend to stay as a customer in foreseeable future. A customer can be satisfied with a company without being loyal. Only working to build a strong relationship with the customer will help to improve loyalty. Over the years, the Walker Loyalty Reports have consistently revealed one major interesting fact- 'satisfaction does not lead to loyalty or business success (i.e. profitability) and, therefore, is not a good measure of how customers will act in the future'. Satisfaction only captures a company's ability to meet their customers' minimum requirements and simply measures past experiences.

Strong customer loyalty can help telecom companies to realize significant financial benefits, including reduced sales costs due to better client retention, increased profitability through expanded relationships, and new revenue from customer referrals. Companies with more loyal customer bases consistently tend to report better results in terms of profitability.

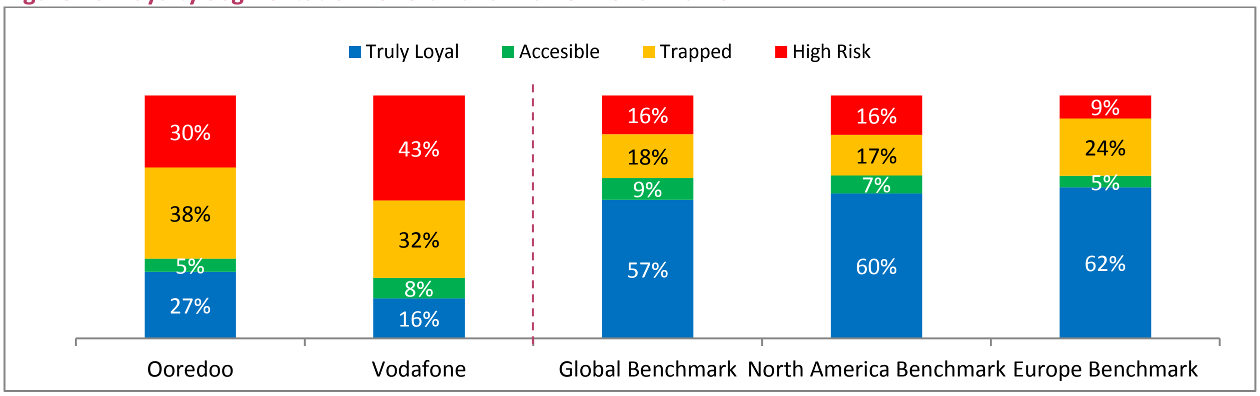
Walker classifies customer loyalty into four key segments, viz.

1. **Truly Loyal**: Those who feel positive towards the brand/ service and intend to recommend/ use
2. **Trapped**: Those who feel neutral or negative and yet intend to recommend/ continue. Understanding this group can help pinpoint on how to improve their attitude
3. **Accessible**: Those who feel positive and yet not likely to recommend/ continue
4. **High Risk**: Those who don't feel positive and are not planning to continue the relationship

Ooredoo customers are observed to be more loyal (27% classified as Truly Loyal) towards their operator, vis-à-vis that observed for Vodafone customers (16% classified as Truly Loyal). Consequently, it is also observed that there are more 'High Risk' customers for Vodafone than that for Ooredoo. Loyalty among both Ooredoo and Vodafone customers in Qatar is observed to be lower than global (57% Truly Loyal) as well as American and European loyalty norms for telecom sector (Figure 40).

High level of 'High Risk' and 'Trapped' customers imply that there is a significant proportion of users who are expecting much better level of services than what they are experiencing currently.

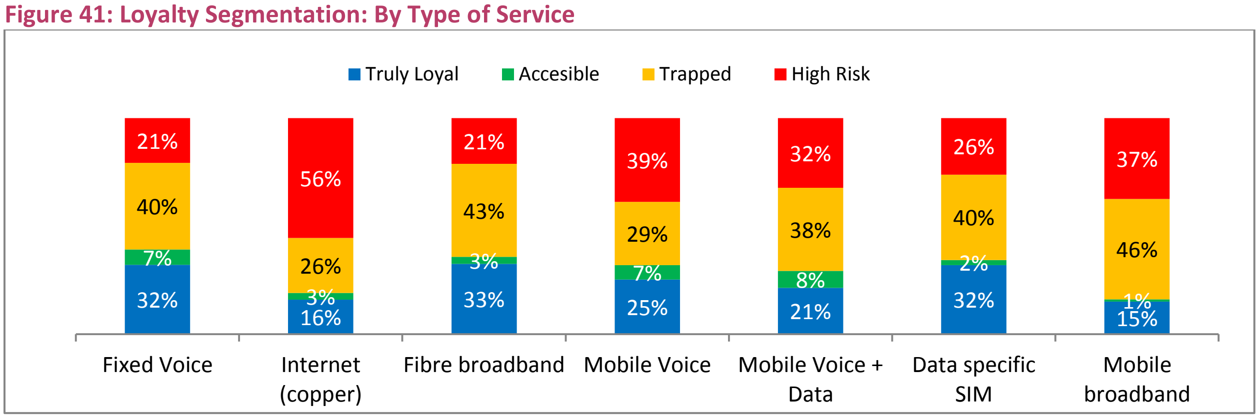
Figure 40: Loyalty Segmentation: Overall and Walker Benchmarks



Source: Customer Satisfaction Survey; Overall sample=2526
Benchmarks are from Walker Stakeholder Satisfaction Database for average of all telecom providers
Note: Numbers may not add up to 100 percent due to rounding

In terms of the products, customers using fibre broadband, fixed voice and data SIM services are relatively more loyal as compared to those using other services. Further, High percentage of 'High Risk' customers is observed in Internet (copper) and this can be an indication of their anticipation to quickly migrate to Fibre broadband (Figure 41).

Figure 41: Loyalty Segmentation: By Type of Service



Source: Customer Satisfaction Survey; Overall sample=2526
Note: Numbers may not add up to 100 percent due to rounding

Customers from the mainstream population are observed to be more loyal as compared to those from transient population. However, there are a significant proportion of trapped customers for both the population segments.

As expected, the postpaid consumers are observed to be more loyal as compared to prepaid consumers. This is probably on account of contracts for postpaid customers (which lead to higher costs of switching for consumers) and lacking of the same in the prepaid services.

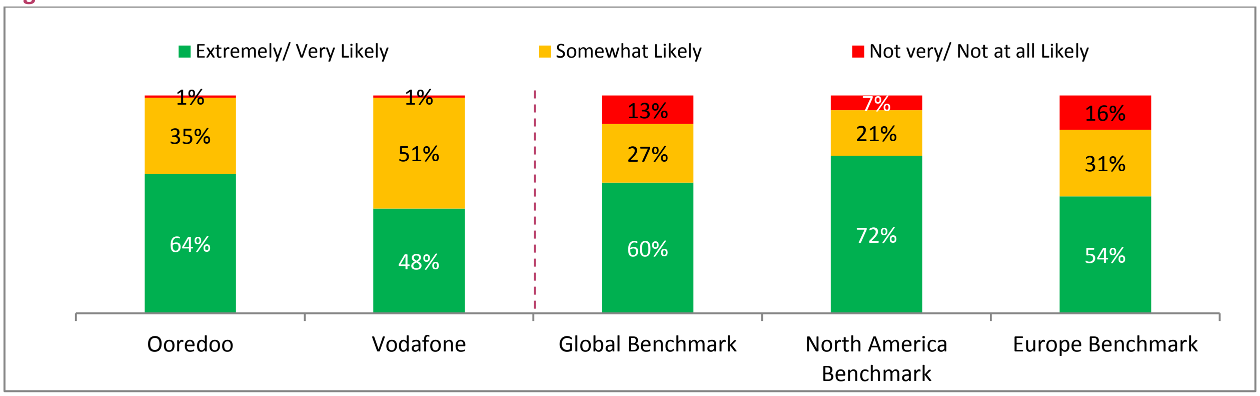
Behavioral Loyalty

Behavioral loyalty is one of the core components of customer loyalty. From an individual consumer perspective, behavioral loyalty has three key metrics, viz. intention to continue, intention to purchase again and intention to recommend. However, the most important is intention to recommend and is explored here.

Intention to Recommend

In line with customer loyalty, a high proportion (64%) of Ooredoo customers are likely to recommend their service provider as compared to 48% for Vodafone customers. The overall brand advocacy (intention to recommend) in telecom sector in Qatar is observed to be at par with global benchmarks (Figure 42).

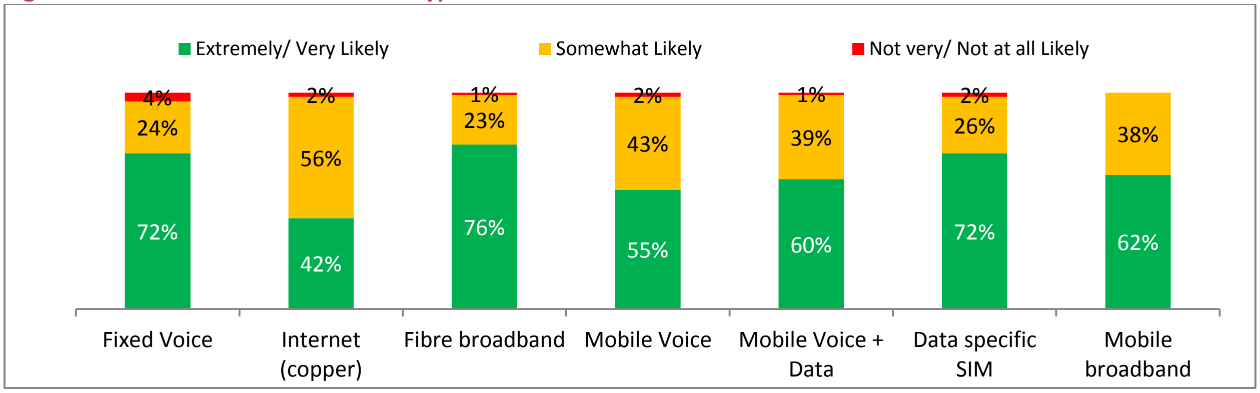
Figure 42: Intention to Recommend



Source: Customer Satisfaction Survey; Overall sample n=2526
Global Benchmark is from Walker Stakeholder Relationship Database
Note: Numbers may not add up to 100 percent due to rounding

Relatively lower recommendation levels for mobile voice/ data and mobile broadband (Around 60% likelihood) services indicate a need to understand consumer expectations and address the same (Figure 43). Users of fibre broadband, fixed voice and data SIM (>70% likelihood for these services) are more likely to recommend the brand they are using for these services. The higher recommendation for fibre broadband (76%) and fixed voice (72%) could be due to lack of competition and consumers being forced to recommend.

Figure 43: Intention to Recommend: Type Of Service



Source: Customer Satisfaction Survey; Overall sample n=2526
Note: Numbers may not add up to 100 percent due to rounding

Postpaid customers (63%) have a slightly higher tendency to recommend the telecommunication services as against the prepaid (57%) customers.

The intention to recommend the service provider is significantly higher among females as compared to males. Also, Qataris are more positively disposed to recommend their service provider as compared to that for non-Qataris.

Brand Image Perceptions

Basis their own experience and what they see and hear around them, consumers do create certain image perceptions of the brands. These image perceptions are formed over a period of time and consequently, take time to change as well. 10 key image statements were identified to assess brand perceptions in consumers' minds.

In this survey, customers were asked for their endorsements on various image statements across services/ service providers. Endorsements are defined as the proportion of customers who either agree or strongly agree that the brand they are using is associated with a particular brand image parameter.

At an overall level, moderate endorsements are observed across the image parameters. With just around 50% positive endorsements, there is a scope to enhance the perception of service providers across most of the image parameters (Table 29). In line with higher customer loyalty, endorsements among Ooredoo customers are better than that among Vodafone customers.

Table 29: Imagery Perception by Service Provider

Image Parameters		Ooredoo	Vodafone
Advanced/ Preferred	Is a leader in mobile Industry	56%	46%
	Is a brand preferred over others	68%	60%
	Is a technologically advanced company	58%	48%
Reputed/ Popular	Excellent reputation	65%	57%
	Is used by lot of people I know	63%	55%
Customer Centric	Is responsive and cares for company	55%	41%
	Is transparent in its dealings with customers	53%	48%
	Offers new and innovative products and services	55%	48%
	Is a brand that I am proud to be customer of	51%	43%
	Is a trustworthy brand	56%	54%

Source: Customer Satisfaction Survey; Overall sample n=2526
Imagery parameters are arranged in order of impact on overall customer loyalty
Scores in table are proportion of consumers rating as 'strongly agree/ agree' on each image parameter

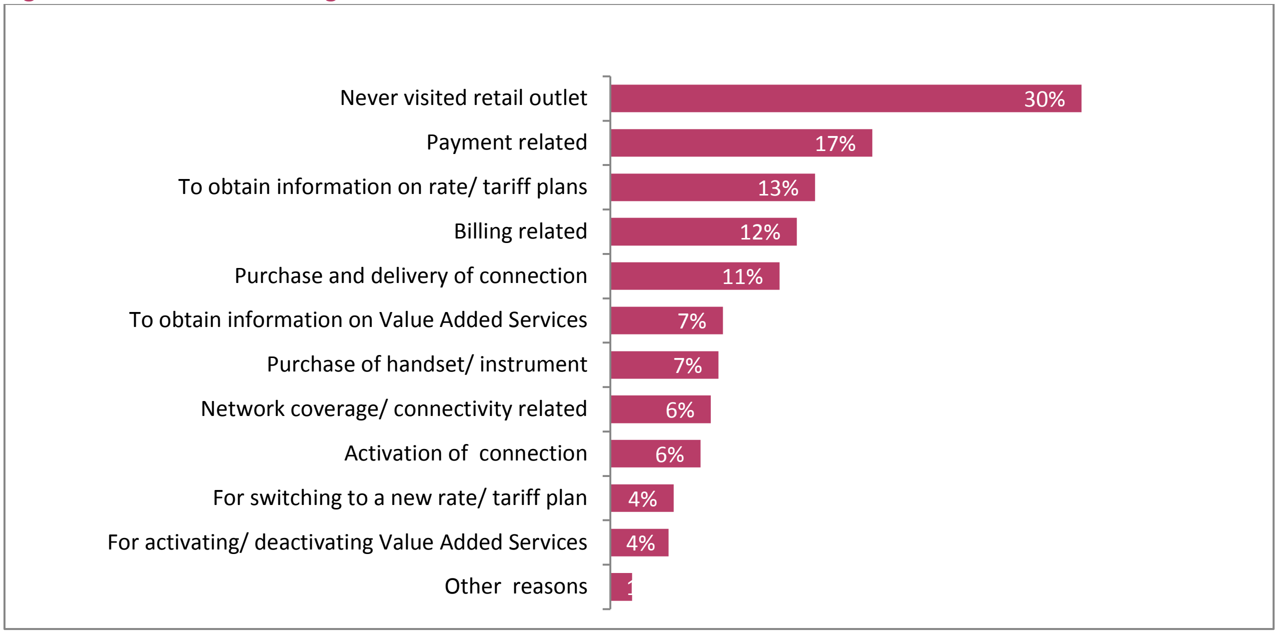
Customers' Experience with Key Touch-Points

Customers interact with their service provider through three key means, viz. in-person visit at company outlet, calling up customer care center or online interaction (Social media or Mobile apps). It is essential to understand how important these modes are for consumers and their satisfaction while interacting through these modes.

Company Outlet

Company outlet is visited by consumers for various reasons. Research shows that while 30% of the customers claim to have never visited company outlet; those who have visited have done so mainly for payments, procuring information on tariff plans, billing related or for connection purchase (Figure 44). The key reasons for visiting the showroom does not vary significantly with the operator and it is observed that payments and procuring information on tariff plans are the key reasons for both Ooredoo and Vodafone customers (Table 30). Given that 'rate plans/ tariffs' is one of the key improvement areas and is a key reason for outlet visits, there is a need to better serve consumer needs on rate plans/ tariff related aspects.

Figure 44: Reasons for Visiting the Outlet



Source: Customer Satisfaction Survey; Overall population n=2526

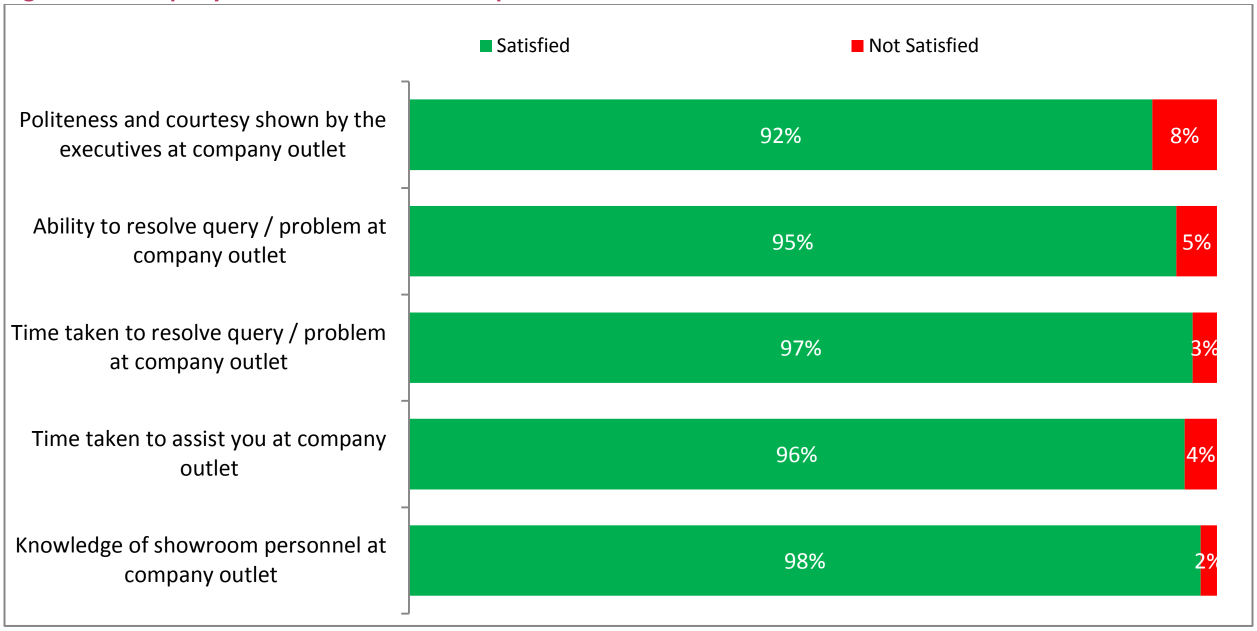
Table 30: Reasons for Visiting the Outlet: By Service Provider

Reasons for Visiting the Outlet	Overall	Ooredoo	Vodafone
Never visited retail outlet	**30%**	33%	24%
Payment related	**17%**	16%	18%
To obtain information on rate/ tariff plans	**13%**	13%	12%
Billing related	**12%**	13%	10%
Purchase and delivery of connection	**11%**	11%	11%
To obtain information on Value Added Services	**7%**	7%	8%
Purchase of handset/ instrument	**7%**	7%	7%
Network coverage/ connectivity related	**6%**	5%	9%
Activation of connection	**6%**	6%	6%
For switching to a new rate/ tariff plan	**4%**	4%	4%
For activating/ deactivating Value Added Services	**4%**	3%	5%
Other reasons	**1%**	1%	3%

Source: Customer Satisfaction Survey; Overall population n=2526

At an overall level, more than 95% of the visitors to company outlets are satisfied with their experience across most of the touch-points (Figure 45). It is also observed that the experience is quite similar across both Ooredoo as well as Vodafone outlets (Table 31).

Figure 45: Company Outlet- Sub Attribute Experience



Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers
Note: Numbers may not add up to 100 percent due to rounding

Table 31: Experience with Company Outlet: By Service Provider

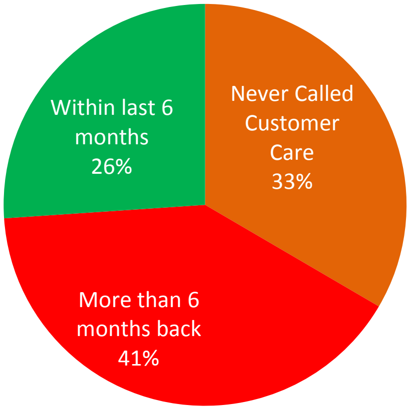
Company Outlet	Overall	Ooredoo	Vodafone
Politeness and courtesy shown by the executives at company outlet	92	92	93
Ability to resolve query / problem at company outlet	95	95	94
Time taken to resolve query / problem at company outlet	97	98	96
Time taken to assist you at company outlet	96	95	97
Knowledge of showroom personnel at company outlet	98	98	99

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Customer Care/ Call Center

The research suggests that around 1/4th (26%) of the customers have contacted their operator's customer care center in the last 6 months (Figure 46). This percentage of customers contacting customer care is very similar for both Ooredoo (26%) and Vodafone (26%). Interestingly, 1/3rd of the customers have never called up call center for any query or problem and this is similar for both the operators, viz. Ooredoo (35%) and Vodafone (31%).

Figure 46: Called the Customer Care

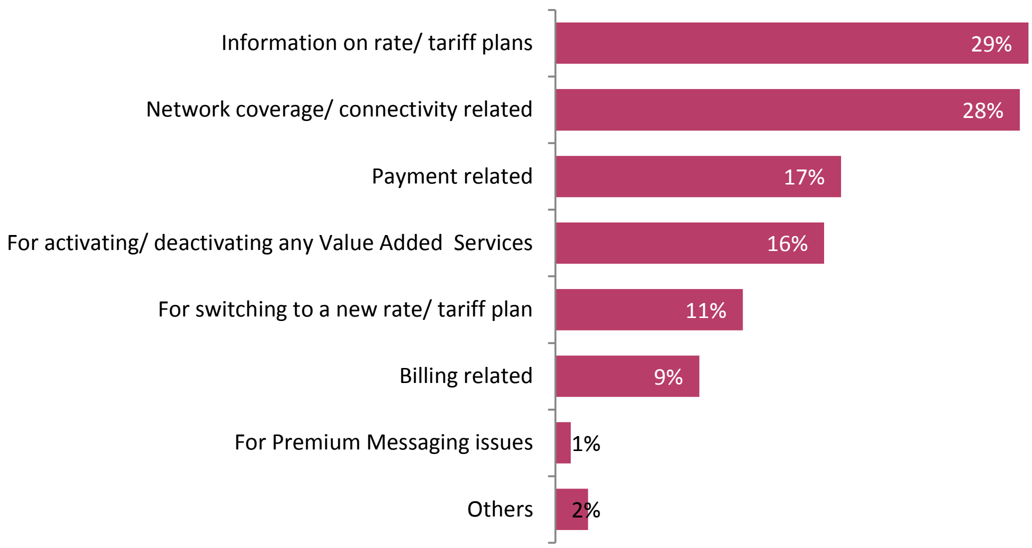


Source: Customer Satisfaction Survey; Overall sample n=2526
Note: Numbers may not add up to 100 percent due to rounding

Similar to that observed for company outlet, 'obtaining information on rate/ tariff plans' remains the key reason for calling customer care center as well (Figure 47). This is particularly higher among Vodafone consumers (33%) as compared to Ooredoo (27%).

Also, apart from regular issues related to billing & payment, customers also call customer care for network related queries/ issues. Interestingly, the most important reason for contacting Vodafone call center is for Network/ coverage issues (36%) while for Ooredoo it is about obtaining information on rate plans (27%).

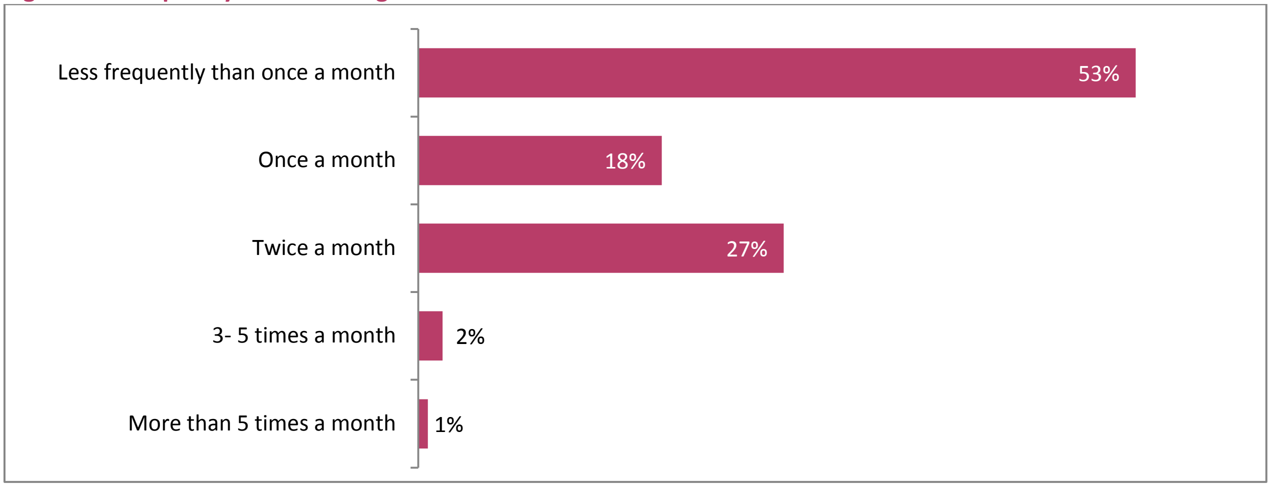
Figure 47: Reasons for Calling Customer Care Call Center



Source: Customer Satisfaction Survey; Overall sample n=2526
Question asked specifically to those calling in last 6 months (n=1089)

Among those who called in last 6 months, more than 1/4th (27%) claim to be calling the customer care center more than twice a month (Figure 48). This frequency is observed to be higher for Vodafone (36%) as against 23% for Ooredoo. Further, it is also seen that the frequency of calling is relatively lower among Ooredoo consumers with 61% calling less frequently than once a month as compared 40% of Vodafone customers who call less often than once a month. This might indicate that Vodafone consumers have relatively higher complaints as compared to Ooredoo.

Figure 48: Frequency of Contacting Customer Care Call Center

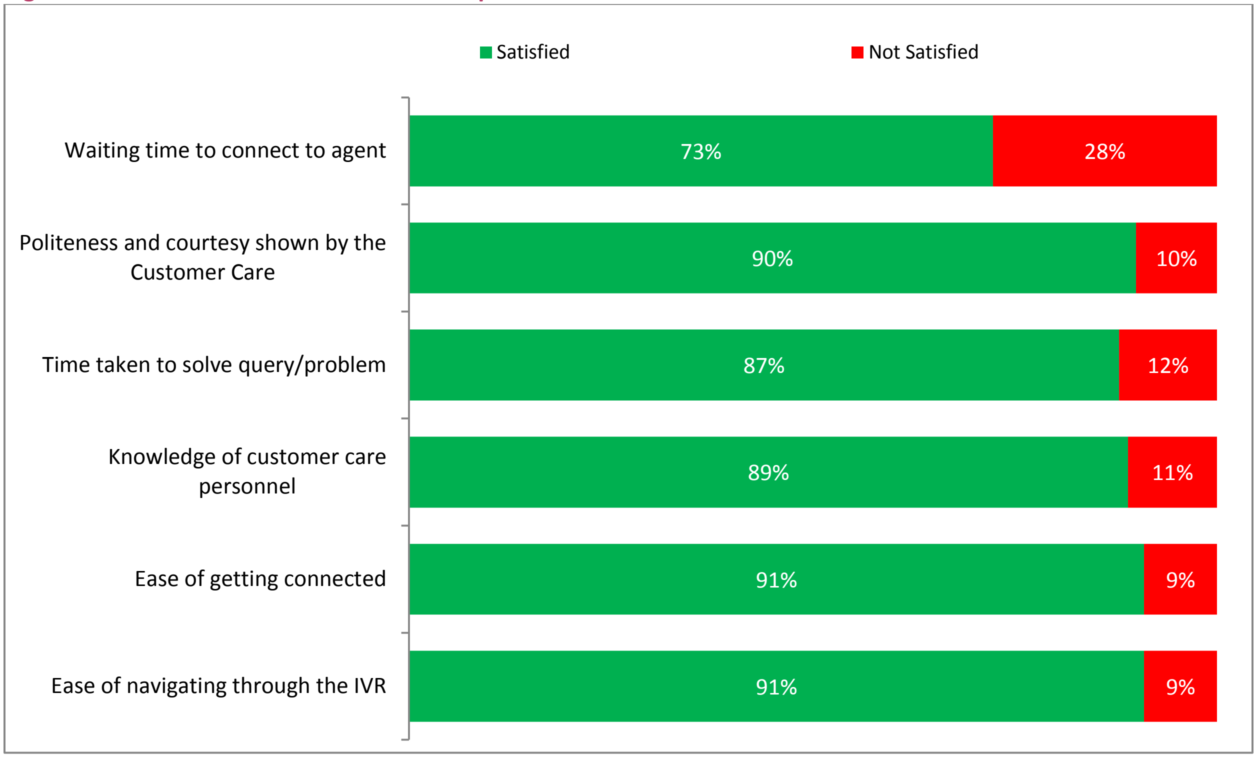


Source: Customer Satisfaction Survey; Overall sample n=2526
Question asked specifically to those calling in last 6 months (n=1089)

'Wait time at customer care center' is one of the most important parameters for the customers and a very high dissatisfaction (28%) is observed on the same (Figure 49). The dissatisfaction is high among both Ooredoo and Vodafone customers (Table 23). There are stringent KPIs in place for customer care, as mentioned in CRA's Service Regulatory Framework 2014 (Table 33). Given high dissatisfaction among both Ooredoo and Vodafone customers (Table 32), there is probably a need to relook into the processes being followed currently by the service providers in Qatar.

High dissatisfaction (>10%) is observed on other agent related parameters also, such as 'time taken to resolve query/ problem' and 'knowledge of customer care personnel'. This issue is observed to be more prominent for Ooredoo customer care center.

Figure 49: Customer Care- Sub Attribute Experience



Source: Customer Satisfaction Survey; Overall sample n=2526
Question asked specifically to those calling in last 6 months (n=1089)
Parameters are arranged in order of importance to consumers
Note: Numbers may not add up to 100 percent due to rounding

Table 32: Experience with Customer Care Call Center: By Service Provider

Customer Care/ Call Center	Overall	Ooredoo	Vodafone
Waiting time to connect to agent	72	71	76
Politeness & courtesy shown	90	91	88
Time taken to solve query/problem	88	85	93
Knowledge of customer care personnel	89	86	93
Ease of getting connected to the customer care number	91	90	93
Ease of navigating through IVR	91	90	94

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Question asked specifically to those calling in last 6 months (n=1089)
Parameters are arranged in order of importance to consumers

Table 33: CRA KPI for Service Providers: Standard and Target for Response time by Customer Support Center

#	Name	Fixed/ mobile	Description/ Definition	Standard	Target
R3	Response time by customer support center- phone call	Both mobile and fixed	The response time by customer support center is the period of time between the end of dialing and the instant when the call actually reaches a human that is capable of discussing the customer's issue	E1 5.6	75% in <15 s 95% in <30 s

Source: Annex 2 of Service Regulatory Framework by CRA Qatar (2014)

Online Modes: Social Media and Mobile Applications

Social Media

Social media has become a ubiquitous medium for consumers to interact, engage and connect with friends and family. Further, social media is constantly being used by businesses to engage with consumers and also to get consumer feedback. This phenomenon is not a one-way street and consumers also are continuously engaging and using this as medium to interact with services providers/ brands. Both the telecom service providers are quite active across various Social media platforms and hence a need was felt to understand the level of telecom consumers' engagement with Social media.

In this section, Social media and its importance in telecom sector in Qatar will be analyzed from three key lenses, viz.

- Social media usage in Qatar *(Source: Secondary Research)*
- Service providers' engagement with consumers on Social media *(Source: Exploratory Research-discussions with Service Providers)*
- Consumer interaction with Social media *(Source: Quantitative Research)*

Social media usage in Qatar

Consumers in Qatar are observed to be heavy users of Internet services. The penetration of 88% is one of the highest in the world as well as in the Middle East region (Table 34).

Table 34: Internet Penetration

Rank	Economy	2012
1	Korea (Rep.)	97.4
2	Qatar	88.1
3	Singapore	87.7
4	Macao, China	81.0
5	Bahrain	79.0
6	Hong Kong, China	78.6
8	Brunei	72.4
9	UAE	72.0
10	Saudi Arabia	66.6

Data Source: The state of Broadband 2013: Broadband Commission, September 2013, ITU

In Qatar, 76% of the Internet users access social media sites regularly and the users spend about 3.2 hours on an average (per day) on social media (Figure 50). This is at par with other countries in the region.

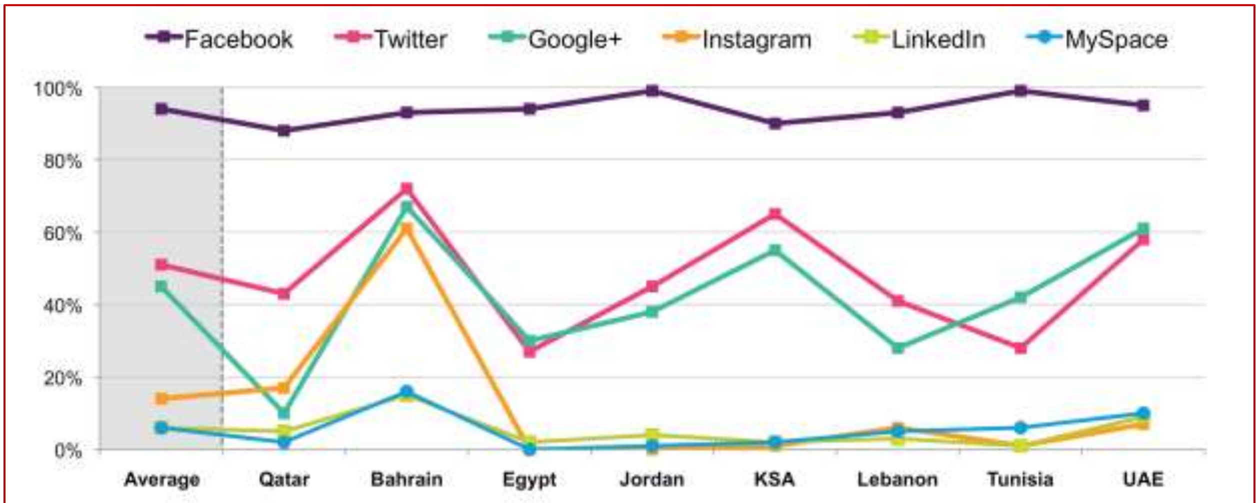
Figure 50: Social Media Usage in Qatar

	Qatar	Average	Best-in-class
Usage of Social networking sites	76%	93%	99% BAHRAIN
Daily usage of Social networking sites	45%	60%	77% TUNISIA
Hours clocked per day on Social Networking	3.2	3.2	4.1 BAHRAIN/ TUNISIA

Source: Media Use in Middle East: A report by Northwestern University in Qatar (In association with Harris Interactive)
Survey conducted among 10,000 respondents in 8 countries

Facebook and Twitter are the two most frequently used social media platforms by telecom users in the State of Qatar (Figure 51). Social media usage in Qatar is observed to be at par with other countries in the region.

Figure 51: Social Media Usage- By Type of Platform

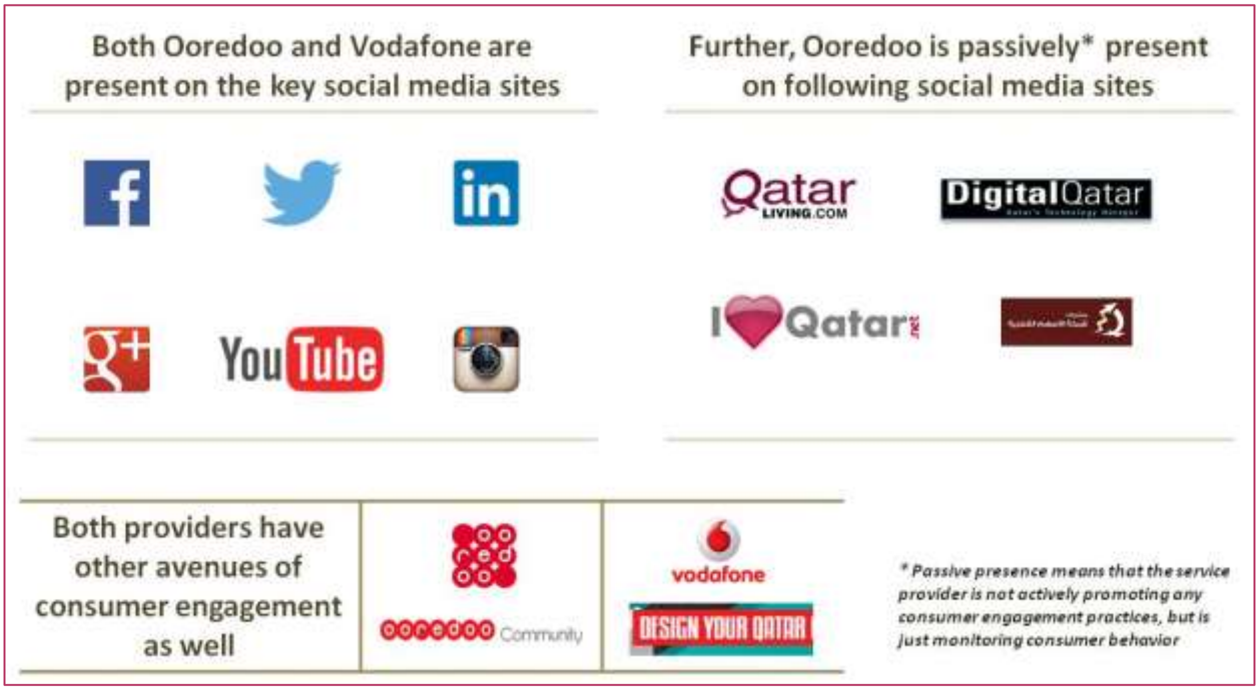


Source: Media Use in Middle East: A report by Northwestern University in Qatar (In association with Harris Interactive)
Survey conducted among 10,000 respondents in 8 countries

Service Providers' Engagement with Consumers on Social Media

Telecom service providers in Qatar are actively present across various social media platforms to engage with their customers (Figure 52).

Figure 52: Service Providers Presence in Social Media



The service providers use various social media platforms for brand building, customer engagement, customer queries and sharing company news etc. Expectedly, Facebook and Twitter are used more frequently than other platforms (Figures 53 and 54).

Figure 53: Reasons For Usage of Social Media: Ooredoo

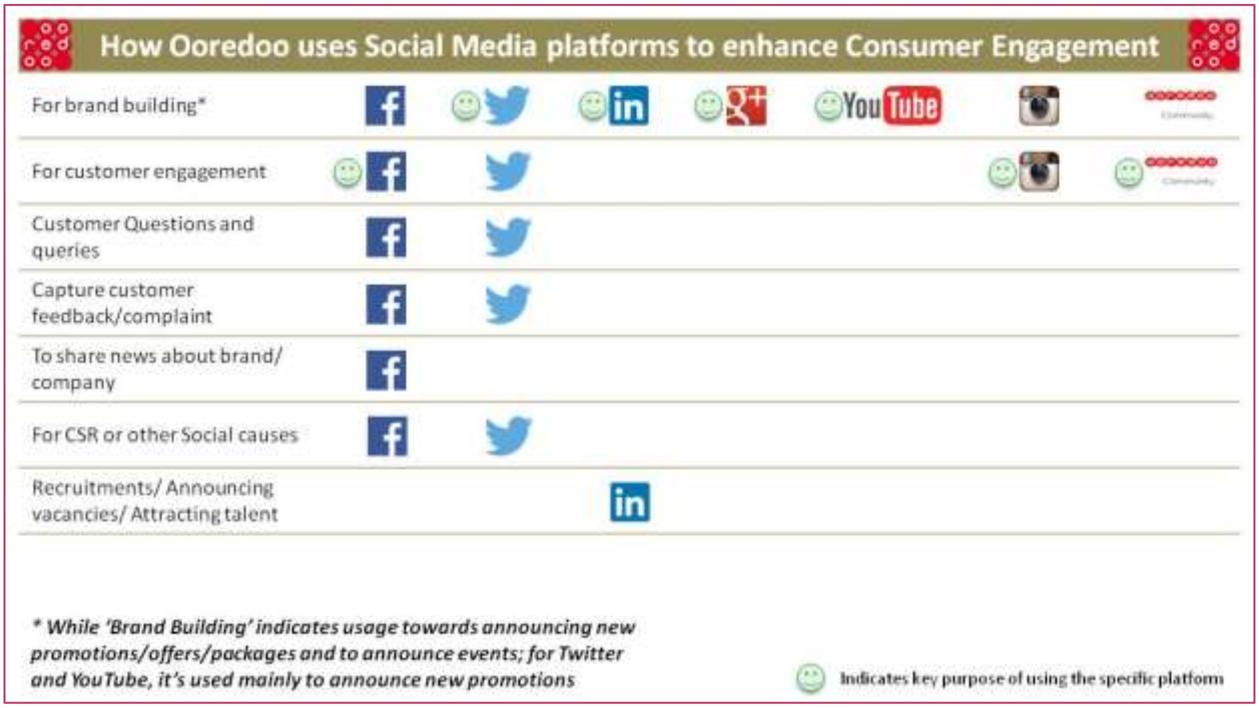
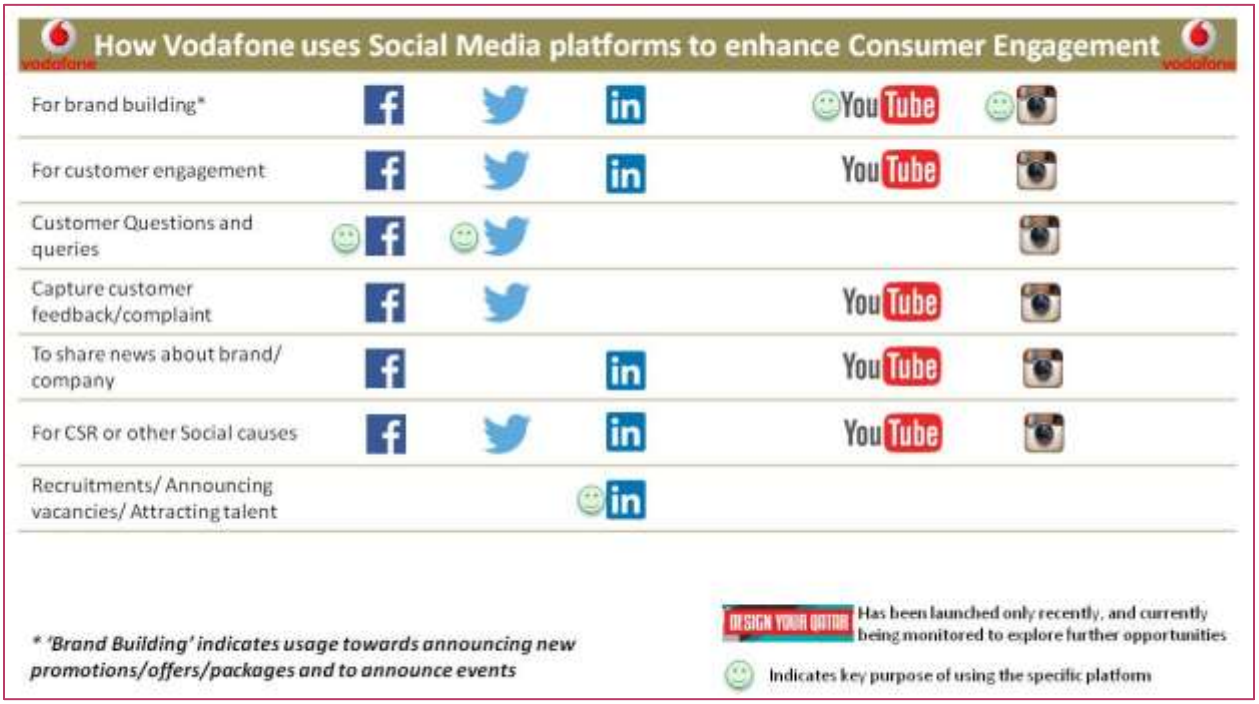


Figure 54: Reasons For Usage of Social Media: Vodafone Qatar



Further, a significant increase in followers/ subscribers for both Ooredoo and Vodafone is observed over the last 18 months (Figure 55), which is a good indicator of enhanced engagement among consumers and service providers.

Figure 55: Service Providers' Engagement with Social Media

	ooredoo	vodafone	ooredoo	vodafone
Facebook	467,000 likes	407,797 likes	234,761 likes	217,036 likes
Twitter	122,000 followers	75,607 followers	40,254 followers	16,947 followers
LinkedIn	27,216 followers	15,442 followers	12,521 followers	5,143 followers
Google+	671 followers 100,980 views	213 followers	11 followers	288 subscribers
YouTube	72 videos 1,749,700 views	238 videos 16,448 subscribers 5,615,530 views	67 subscribers	288 subscribers
Instagram	694 posts 16700 followers	760 posts 11870 followers	3,315 followers	No Official account

Numbers in table on left are as on Dec 10, 2014. Source: Individual Social Media sites of Service Providers (Local country pages)
Numbers in table on right are as on April 10, 2013. Source: https://nateeja.wordpress.com/digital-marketing-planning/

Consumer Interaction with Social Media

Telecom users in Qatar are heavy users of social media platforms particularly Facebook, YouTube, QatarLiving with Facebook being used more often at 76% (Table 35).

However, as of now, consumers don't communicate actively with their service providers via social media and this shows the potential to enhance active engagement between consumers and service providers.

Given usage statistics, Facebook, Twitter & YouTube present the best opportunities for service providers to enhance their social media interaction with the users.

Table 35: Social Media Usage Trend

Social Media Platforms	Using Social Media	Follow/ Read Service Provider	Communicated with Service Provider
Facebook	76%	24%	12%
Twitter	24%	10%	6%
YouTube	62%	17%	10%
Instagram	17%	5%	3%
ILoveQatar	3%	1%	1%
Qatar Digital	2%	1%	1%
Qatar Living	18%	5%	3%
Ooredoo community	3%	1%	1%
Designyourqatar	2%	1%	1%

Source: Customer Satisfaction Survey; Overall sample n=2526

Interestingly, and positively, consumers who are actively using social media platforms but don't communicate with the service providers express no aversion to using the same in future (Table 36). However, given that some users are not aware of social media usage for interaction with service providers, there is a need to generate awareness for the same.

Table 36: Reasons for Non Usage of Social Media to Communicate with Service Provider

Reasons for non-usage	Facebook	Twitter	YouTube	Instagram	Qatar Living
Not a reliable mode/ mechanism	13%	12%	11%	16%	15%
I feel/ have heard it takes a lot of time to resolve queries and complaints via social media	9%	9%	10%	4%	20%
I am not aware of putting a request/ complaint via social media for telecom related services	23%	4%	9%	5%	14%
No particular reason- just never tried but am open to trying if required	44%	33%	46%	50%	29%
Never felt the need as traditional choices are sufficient	13%	15%	16%	15%	16%
Don't Know/ Can't Say	15%	31%	15%	16%	23%

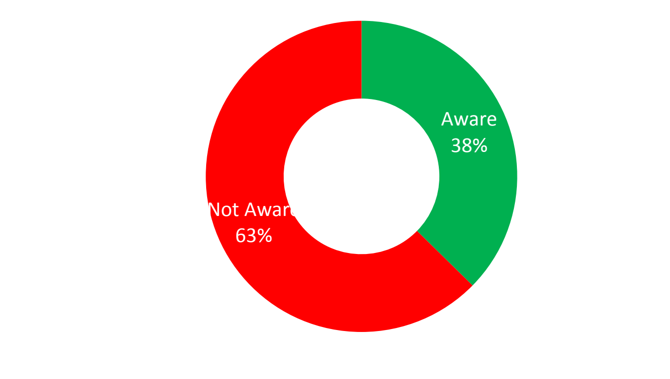
Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who use but do not communicate with their service providers on respective social media platforms

Mobile Application

As a part of enhancing online/ digital interaction with consumers, both Ooredoo and Vodafone have launched mobile applications for their customers' convenience. The aim is to help consumers engage with service providers more effectively and efficiently by finding latest information, participating in reward programs, understanding billing and recharge amount, bill payment, recharging and other related activities. There is thus a need to understand the usage and satisfaction with these applications among the consumers.

At an overall level, 38% of smartphone users are aware of their operator's mobile apps (Figure 56). Awareness is higher among Ooredoo (43% aware) consumers vis-à-vis that for Vodafone (29%).

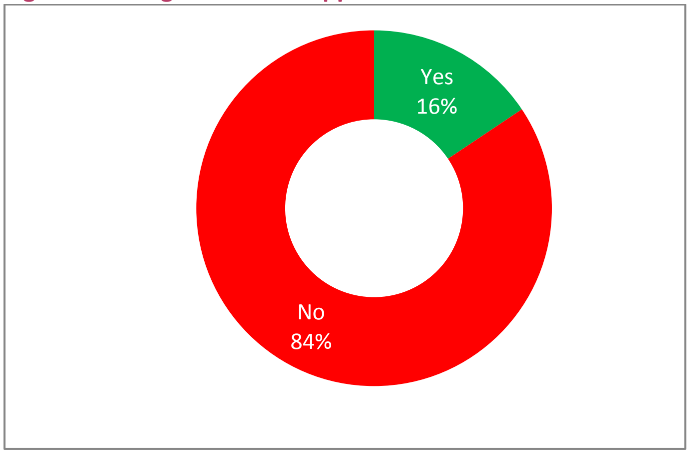
Figure 56: Awareness of Mobile Application



Source: Customer Satisfaction Survey; Overall sample n=2526
Data represents only smartphone users (n=1145)
Note: Numbers may not add up to 100 percent due to rounding

Among those who are aware of the application, only 16% *(i.e. 6% of total customers surveyed)* of the consumers have installed the mobile application on their smartphones/ tablets (Figure 57). Clearly, there is significant headroom to build trial and regular usage of application among smartphone users. The usage of mobile application for both Ooredoo (15%) and Vodafone (18%) is very similar and indicates the need to induce usage among both operators.

Figure 57: Usage of Mobile Application

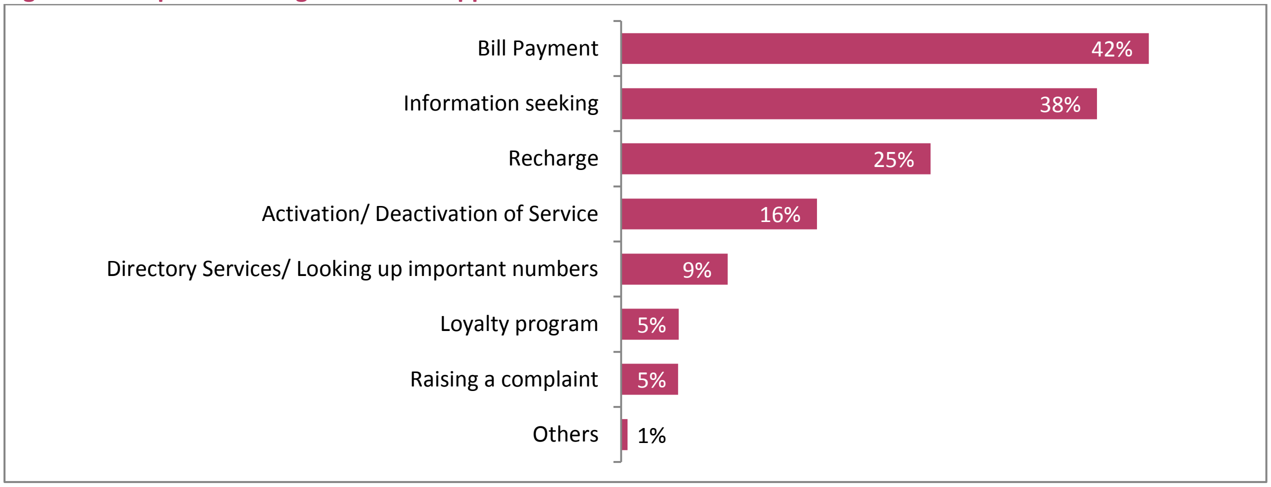


Source: Customer Satisfaction Survey; only those aware of mobile application of Overall sample n=2526
Question specifically asked to those who are aware of mobile application of their respective service providers (n=1145)
Note: Numbers may not add up to 100 percent due to rounding

The primary purpose for usage of mobile application is **bill payment** (42%) followed by **procuring information** (38%) and **recharge** (25%). Some consumers also use it for service activation/ deactivation and using it as a directory (Figure 58).

Thus, there is a clear need to enhance awareness of the mode and encourage more consumers to use it for bill payment, complaint lodging, etc. It will help in reducing workload at customer care center and at company outlets.

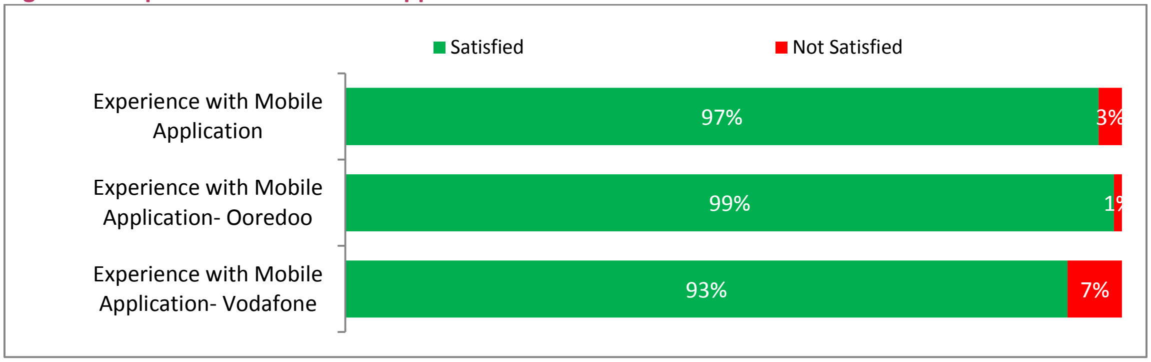
Figure 58: Purpose for Usage of Mobile Application



Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who use mobile application of their respective service providers (n=194)

Majority of mobile application users are satisfied with the service; which augurs well for the service providers (Figure 59). The experience is strong and quite similar among both Ooredoo and Vodafone users. Highly satisfactory consumer experience indicates that there is a huge potential for 'Mobile Application' as a viable alternative mode for engaging effectively and efficiently with consumers. However, low awareness and low usage of the same is limiting its potential. The need thus is to induce trials and get consumers stick to this mode.

Figure 59: Experience with Mobile Application



Source: Customer Satisfaction Survey; Overall sample n=2526
Question specifically asked to those who have used mobile application of their respective service providers (n=194)
Note: Numbers may not add up to 100 percent due to rounding

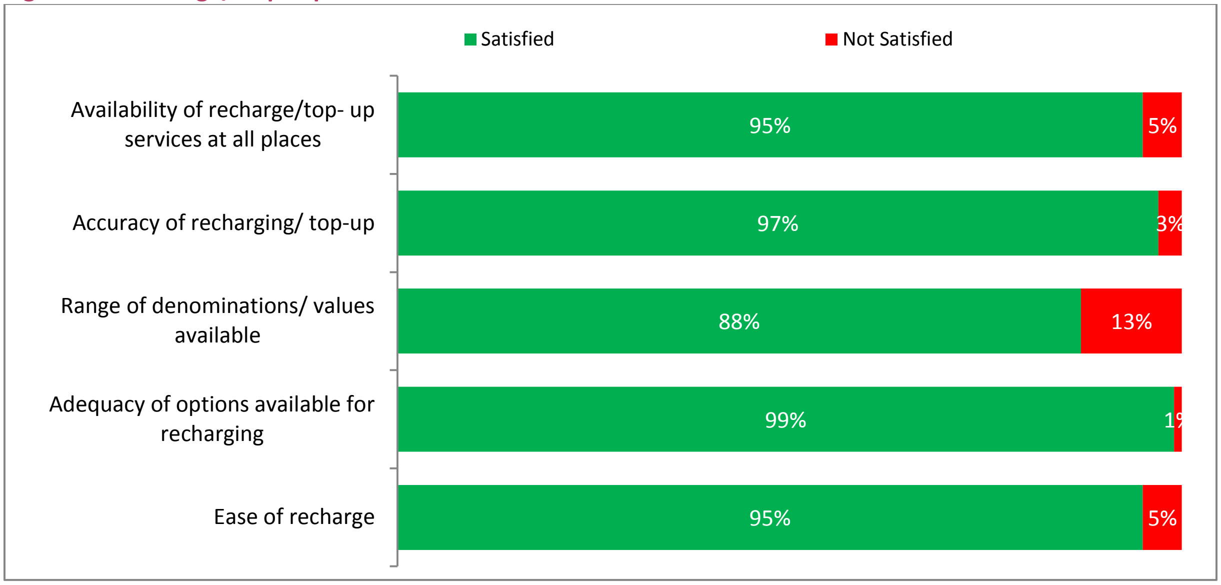
Experience by Type of Connection

There are some consumer experiences which are specific to the type of connection owned by them. While recharge/ top-up process is relevant to the prepaid consumers; billing and payment experiences are important for postpaid consumers.

Prepaid Consumers: Recharge/ Top- up Process

More than 90% satisfaction is observed on various key parameters related to recharge/ top-up process, such as availability, accuracy, adequacy of options and ease of recharge (Figure 60). However, high dissatisfaction (13%) is observed on 'range of denominations available'. This issue is observed for both Ooredoo and Vodafone (Table 37). Further, there is a need to look at range for males and non-Qataris (Table 38).

Figure 60: Recharge/ Top- Up Process- Sub Attribute Performance



Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers
Note: Numbers may not add up to 100 percent due to rounding

Table 37: Experience with Recharge/ Top-Up Process: By Service Provider

Recharge/ Top-Up Process	Overall	Ooredoo	Vodafone
Availability of recharge/top- up services	95	95	95
Accuracy of recharging/ top-up	97	96	99
Range of denominations/ values available	88	87	87
Adequacy of options available	99	98	99
Ease of the recharge/Top-up process	95	96	95

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 38: Experience Recharge/ Top-Up Process: By Age, Gender and Nationality

Recharge/ Top-Up Process	Overall	Age			Gender		Nationality	
		15-24 years	25-44 years	45 and beyond	Male	Female	Qatari	Non Qatari
Availability of recharge/top- up services	95	94	94	98	95	97	97	95
Accuracy of recharging/ top-up	97	97	96	98	97	99	97	96
Range of denominations/ values available	88	95	86	91	86	97	96	87
Adequacy of options available	99	96	99	98	98	98	97	99
Ease of the recharge/Top-up process	95	92	95	97	95	98	96	94

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Consumers are also vocal about issues related to recharge.

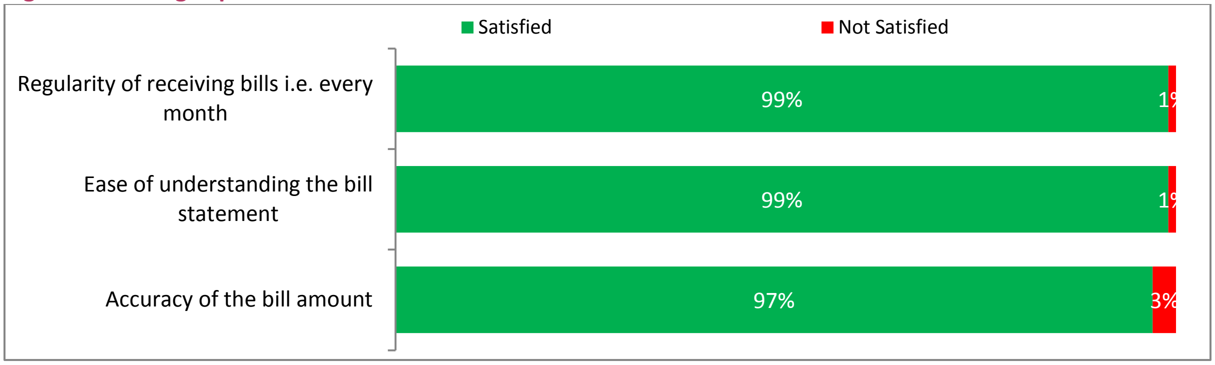
> *"I once had issue about blackberry that the complete recharge was consumed immediately. Till this day, I did not get the credit back"* ***(25-35 year old Arab Female)***

Postpaid Consumers: Billing and Payment Experiences

Billing Experience

Universal satisfaction (Around 100%) is observed on billing related aspects (Figure 61). Further, the experience is satisfactory among both Ooredoo and Vodafone customers (Table 39).

Figure 61: Billing Experience- Sub Attributes Performance



Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers
Note: Numbers may not add up to 100 percent due to rounding

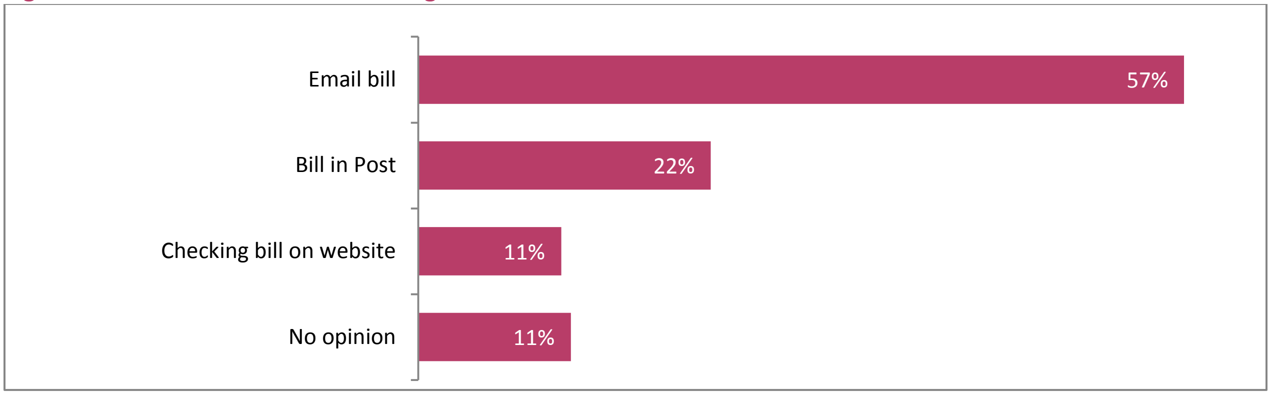
Table 39: Experience With Billing: By Service Provider

Billing Experience	Overall	Ooredoo	Vodafone
Regularity of receiving bills i.e. every month	99	99	99
Ease of understanding the bill statement	99	100	100
Accuracy of the bill amount	97	96	99

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Postpaid Bill of sample n=2526
Parameters are arranged in order of importance to consumers

While majority of customers prefer green billing (68% prefer over e-mail or website), there is still headroom to achieve 100% green billing (Figure 62). Service providers need to look at incentivizing the customers to use e-mail/ website based bill. The consumers who prefer bill by post belong mainly to transient population (primarily 25-44 years old). The preference for email bill is higher among Ooredoo consumers (60%) as compared to Vodafone users (51%). This could be result of the efforts taken by Ooredoo to convert to 100% e- bill.

Figure 62: Preferred Mode of Receiving Bill

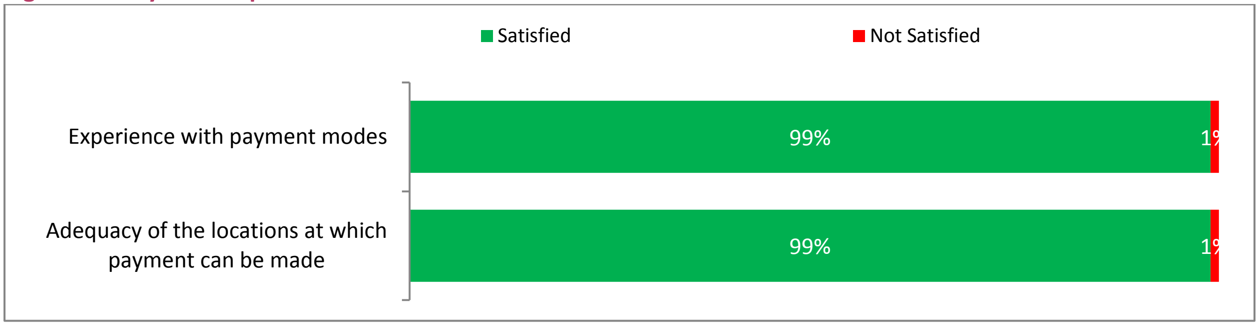


Source: Customer Satisfaction Survey; Postpaid Bill of sample n=1603

Payment Experience

Similar to billing experience, a universal level of satisfaction is observed on payment experience as well (Figure 63). Further, the experience is equally strong among both the operators' customers (Table 40).

Figure 63: Payment Experience- Sub Attributes Performance



Source: Customer Satisfaction Survey; Postpaid Bill of sample n=2526
Parameters are arranged in order of importance to consumers
Note: Numbers may not add up to 100 percent due to rounding

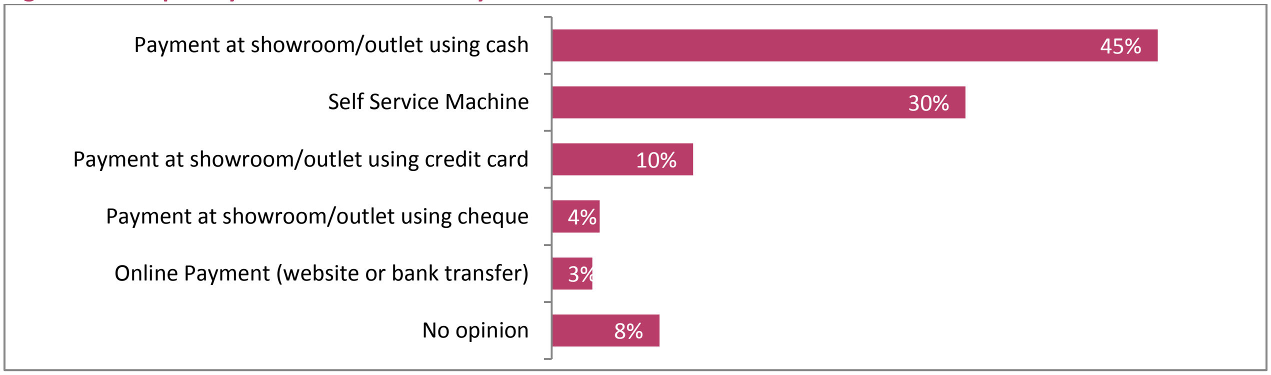
Table 40: Experience with Payment: By Service Provider

Payment Process	Overall	Ooredoo	Vodafone
Experience with payment modes	99	99	99
Adequacy of the locations at which payment can be made	99	99	99

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Postpaid Bill of sample n=2526
Parameters are arranged in order of importance to consumers

While a high proportion of consumers pay their postpaid bills in person (60% at the company outlet), a very negligible proportion currently pay their bills online (Figure 64). Significant and dedicated efforts are required to move customers from in-person (brick & mortar) payment system to online. This would not only enhance the payment experience, but also result in significant cost savings for the operators. There is a critical need to ensure consumers try online and offering incentives to begin with can help the cause. Vodafone customers have very high preference towards payment at outlet/ showrooms (65%), while Self Service Machine (39%) is the most highly preferred mode of payment for Ooredoo. The widespread availability of Self Service machines of Ooredoo could be the reason for this higher preference for Self Service Machines.

Figure 64: Frequently Used Mode of Bill Payment



Source: Customer Satisfaction Survey; Postpaid Bill of sample n=1603

Service Providers: Snapshot of Performance and Key Areas to Monitor

A snapshot of performance of Ooredoo and Vodafone across different experiences is provided in table 41 and 42 below. Basis the norms devised earlier, the following color coding has been used for comparative performance of the two service providers:

Services with 95% or more consumers satisfied : Excellent
Services with 91 - 95% consumers satisfied : Acceptable (Maintain status quo)
Services with 85 – 90% consumers satisfied : Need minor intervention by the Regulator
Services with <85% consumers satisfied : Need significant intervention by Regulator

Table 41: Ooredoo and Vodafone Performance Snapshot (1)

Parameter	Ooredoo	Vodafone	Parameter	Ooredoo	Vodafone
Quality of Service	90	85	**Pricing**	86	92
			Local call charges	80	81
Network			Value Add Services	79	83
Availability of network all times	94	90	International Call Charges	70	68
Spread/ coverage	98	96	Cost of Data Charges (Roaming)	72	67
Quality of network coverage	95	98	Cost of Call Charges (Roaming)	76	79
Voice quality & clarity	95	96	Initial Cost of Purchase of SIM	88	88
Lack of call drops	94	91	Installation Cost	92	92
SMS delivery	97	95	Monthly Rental Charges	87	78
Quality of data services	90	95	Initial Cost of Purchase of Data SIM	91	91
Data network coverage	93	95	Cost of Data Charges	80	82
Speed of data services	92	94	Cost of Data Device	91	80
Video access/streaming quality	90	93			
			Rate Plan/ Tariff and Promotions		
Provisioning			Clear Terms and Conditions	91	90
Ease of activation	90	85	Clarity of rate plans	91	93
Sales agent interacted with	97	97	Variety of rate plans	83	80
Ease of purchasing the connection	98	99	Competitiveness of Tariffs	89	91
Initial supply time	97	98	Tariffs of the different services and offers proposed	95	97
Minimum Service period for the product	98	97	Publishing of tariff	90	92
			Usefulness of benefits of promotions	90	90
			Attractiveness of Promotion schemes	87	85
			Reduced spamming and unwanted promotions	89	92
			Options to opt out of promotional messages	89	90

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Table 42: Ooredoo and Vodafone Performance Snapshot (2)

Parameter	Ooredoo	Vodafone	Parameter	Ooredoo	Vodafone
Company Showroom/ Outlet			**Recharge/ Top-up Process**		
Politeness and courtesy shown by the executives at company outlet	92	93	Availability of recharge/top- up services	95	95
Ability to resolve query / problem	95	94	Accuracy of recharging/ top-up	96	99
Time taken to resolve query / problem at company outlet	98	96	Range of denominations/ values available	87	87
Time taken to assist you	95	97	Adequacy of options available	98	99
Knowledge of showroom personnel at company outlet	98	99	Ease of the recharge/Top-up process	96	95
Customer Care Call Center			**Billing Process**		
Waiting time to connect to agent	71	76	Regularity of receiving bills	99	99
Politeness & courtesy shown	91	88	Ease of understanding the bill	100	100
Time taken to solve query/problem	85	93	Accuracy of the bill amount	99	99
Knowledge of cc personnel	86	93	**Advertising & Communication**		
Ease of getting connected	90	93	Clarity	96	95
Ease of navigating through IVR	90	94	Effectiveness	91	89
Payment Process			Relevance	97	98
Experience with payment modes	99	99	Frequency	97	97
Adequacy of the locations at which payment can be made	99	98			

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Basis the performance of the two service providers, the key concerns to be monitored over time for Ooredoo and Vodafone Qatar are as follows (Table 43):

Table 43: Key Concerns Areas to be monitored for Ooredoo and Vodafone Qatar

Primary Focus Areas	Ooredoo	Primary Focus Areas	Vodafone
International Call Charges	70	Cost of Data Charges (Roaming)	67
Waiting time to connect to call center agent	71	International Call Charges	68
Cost of Data Charges (Roaming)	72	Waiting time to connect to call center agent	76
Cost of Call Charges (Roaming)	76	Monthly Rental Charges	78
Cost of Value Add Services	79	Cost of Call Charges (Roaming)	79
Local call charges	80	Cost of Data Device	80
Cost of Data Charges	80	Variety of rate plans	80
Variety of rate plans	83	Local call charges	81
		Cost of Data Charges	82
		Cost of Value Add Services	83
Secondary Focus Areas	**Ooredoo**	**Secondary Focus Areas**	**Vodafone**
Time taken to solve query/problem at call center	85	Attractiveness of Promotion schemes	85
Knowledge of customer care agent	86	Ease of activation	85
Monthly Rental Charges	87	Range of recharge denominations/ values	87
Attractiveness of Promotion schemes	87	Politeness & courtesy shown by call center agent	88
Range of recharge denominations/ values	87	Initial Cost of Purchase of SIM	88

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526

Overall Leveragable Strengths & Key Focus Areas

It is also important to understand the key strengths and improvements areas for Qatar's telecom market at an overall level. The tables below illustrate the overall strengths (Table 44) and key focus areas for improvement (Table 45). Key focus areas by other metrics such as service type, connection type, municipalities and consumer demographics are provided in table 46.

Table 44: Key Leveragable Strengths

OVERALL EXPERIENCE AREA	CUSTOMER TOUCH-POINT
NETWORK	➢ Spread/ coverage of network ➢ Quality of network coverage ➢ Voice Quality & Clarity ➢ SMS Delivery
PROVISIONING	➢ Sales agent interaction ➢ Ease of purchasing ➢ Initial Supply time ➢ Minimum Service Period
RATE PLAN/ TARIFF & PROMOTIONS	➢ Tariffs of different serviced and offers proposed
MOBILE APPLICATION	➢ Strong experience among App users
COMPANY OUTLET	➢ Politeness and Courtesy ➢ Ability to resolve query ➢ Knowledge of outlet personnel ➢ Time taken to assist
RECHARGE	➢ Availability of recharge options ➢ Accuracy of Recharge ➢ Adequacy of options available for recharge
BILLING	➢ Regularity of receiving bills ➢ Accuracy of bill ➢ Ease of understanding bill
PAYMENT	➢ Experience with payment modes ➢ Adequacy of payment locations

Table 45: Key Improvement Areas

OVERALL EXPERIENCE AREA	CUSTOMER TOUCH-POINT
PRICING	➢ International Call charges ➢ Data charges on roaming ➢ Call charges on roaming ➢ Value added services ➢ Cost of data charges ➢ Local call charges
RATE PLAN/TARIFF & PROMOTIONS	➢ Clarity of Rate plans ➢ Attractiveness of promotions ➢ Competitiveness of Tariff ➢ Reduced spamming ➢ Options to opt out of promotions
COMPLAINT RESOLUTION	➢ Speed of Resolution ➢ Turnaround time (time for resolving)
CUSTOMER CARE	➢ Waiting Time to be connected ➢ Knowledge of customer care personnel ➢ Time taken to solve query/ problem
RECHARGE/ TOP-UP PROCESS	➢ Range of denominations

Table 46: Key Focus Areas: By Other Metrics

KEY METRICS	FOCUS AREAS
MUNICIPALITY	➢ Overall QoS perception weaker for Al Daayen; relatively lower in Al Wakra and Doha ➢ Quality of data services in Al Daayen and Al Shamal ➢ Network availability in Al Daayen ➢ Quality of Network coverage in Al Daayen
TYPE OF SERVICE	**INTERNET (COPPER)** ➢ Improvements desired across most of customer touch-points (a quick & smooth transition to fibre broadband can help the cause) **MOBILE VOICE** ➢ Pricing: Local call charges, International call charges and Call charges on Roaming ➢ Rate plans: Variety of rate plans and better promotions ➢ Customer Care: Waiting time to connect to agents **MOBILE VOICE AND DATA** ➢ Pricing: Local call charges, International call charges, Data charges, Monthly rental, Cost of data charges on Roaming and Call charges on Roaming ➢ Rate plans: Variety of rate plans ➢ Customer Care: Waiting time to connect to agents **Data SIM** ➢ Pricing: Cost of data charges on Roaming ➢ Data services: Speed of data and Video access/ streaming **Mobile broadband** ➢ Pricing: Cost of data charges on Roaming ➢ Provisioning: Ease of activation/ provisioning ➢ Rate plans: Variety of rate plans and Promotions **FIBRE (BROADBAND)** ➢ Complaint Resolution: Overall complaint process time taken to resolve ➢ Provisioning: Ease of Activation/ provisioning ➢ Overall experience at Customer Care Call Center
TYPE OF CONNECTION	**PREPAID** ➢ Pricing: All aspects of pricing ➢ Rate plans: Variety of rate plans ➢ Provisioning: Ease of activation/ provisioning ➢ Complaint Resolution: Time taken to resolve ➢ Customer Care: Waiting time for connecting **POSTPAID** ➢ Pricing: All aspects of pricing ➢ Data services: Quality of data service, coverage & speed ➢ All aspects of Customer Care call center
DEMOGRAPHICS	**FEMALES** ➢ Enhance their experience with Complaint resolution and Customer care call center **QATARIS** ➢ Better address their complaint resolution and customer care call center process. Also, better understanding of their pricing requirements **NON-QATARIS** ➢ Pricing related issues and Variety of Rate plan requirements **25-44 YEAR OLDS**

	➢ Understand their pricing and rate plan requirements

Key Considerations for CRA

Keeping in mind the key mandates of CRA and consumer feedback, the key take-outs for CRA are outlined below (Tables 47-51):

Table 47: Take-outs for CRA: CRA Awareness and Mandate

Observations	What CRA can do/ facilitate
CRA AWARENESS Presently, only around 1/5th (19%) of the telecom consumers are aware of CRA.	• Concentrated campaigns focused on CRA's mandate • Promotion of of new technological adoptions and initiatives such as Green Bills • CRA's contacts on all bills as regulator where unresolved issues can be escalated to
TARIFFS PUBLISHING Consumers are currently not aware about tariff publishing; but when prodded, need it on CRA website or via SMS/ monthly bill.	• Tariffs should be duly published on a suitable platform • Consumers should be communicated about the same, thus managing their expectations

Table 48: Take-outs for CRA: Quality of Services

Observations	What CRA can do/ facilitate
MOBILE NUMBER PORTABILITY Less awareness (32%) and usage of MNP (Mobile number Portability) service (9% of those aware) is coupled with weak experience (only around 42% are satisfied).	• Need to ensure that service providers actively promote this service • Service providers need to have clear norms in place to ensure timely porting and strong customer experience
BILLING AND PAYMENT MODES • More than 20% of consumers interviewed still prefer receiving bills by post • Majority of customers (around 50%) prefer to pay the bill in person	• Communicate the benefits of online payment and allay any related security fears • Communicate the benefits of green billing and target at universal green billing within a specified time period

Table 49: Take-outs for CRA: Market Competitiveness

Observations	What CRA can do/ facilitate
PRICING Pricing is an important issue among consumers and a considerable proportion of consumers believe that pricing related aspects including international and local call charges as well as roaming charges are high.	• Conduct a comparative study of pricing across other countries to understand the pricing policy in Qatar vis-à-vis other countries • Take necessary steps to ensure positive customer opinions
MARKET COMPETITIVENESS Only about 1/3rd of consumers feel that the Qatar telecom sector is competitive (either in terms of services provided or prices charged). The key suggestion from customers is to introduce a new player in the market.	• Look at the feasibility of introducing another operator (either a full service provider or MVNO) in the market

Table 50: Take-outs for CRA: Complaint Resolution

Observations	What CRA can do/ facilitate
COMPLAINT RESOLUTION Only 37% of customers claim that their complaints were resolved within 5 days of registering the same. As a result, there is a huge dissatisfaction (25%) on the speed of complaint resolution.	• Complaints not resolved within 30 days to be automatically escalated to CRA • Service providers to file a summary report of complaints registered and resolved to CRA on a monthly basis
SOCIAL MEDIA Service providers are using Social Media to connect with their consumers. Further, the operators are very positive about its future usage and are willing to invest in the same.	• Establish clear SLAs and ensure that service providers duly comply with the same for dealing with complaints generated via Social Media • Continuous monitoring of Social Media

Table 51: Take-outs for CRA: Consumer Rights Protection

Observations	What CRA can do/ facilitate
OPT OUT OF PROMOTIONAL MESSAGES 11% of the consumers are dissatisfied with options provided by service providers to opt out of promotional messages	• CRA needs to strictly ensure that Service Providers adhere to the guidelines • Devise a robust complaint mechanism towards addressing this
MIGRATION FROM COPPER TO FIBRE Ratings by internet (copper) service users are weaker vis-à-vis other service users. Majority of those who have switched from copper to fibre are quite satisfied with switching experience as well as quality of broadband.	• Establish clear timelines for fibre broadband rollout plan that existing or new Service Providers need to comply with • Proactive communication (about roll-out timeline) to allay any adverse consumer reactions

Appendix I: Research Details

Research Methodology

Exploratory Phase: This phase was aimed at understanding the different products and services provided by service providers in the State of Qatar. It was executed using face-to-face in-depth (semi structured) interviewing methodology with various stakeholders (Across various departments in CRA as well as both Service Providers). Exploratory phase helped to generate content (focus areas), which was then appropriately used to develop questionnaire for quantitative phase.

Secondary Research: This phase aims at gathering information from various sources in public domain, such as

- *QoS parameters*
- *Identification of the key touch points of interaction*
- *Demographic information*
- *Services subscriber information*
- *CRA legal and policy frameworks*
- *Data pertaining to other countries for QoS for benchmarking purposes*

The key sources used in Secondary Research are provided in Appendix ABC

Qualitative Phase: This phase aims at understanding qualitatively the objectives of the study including

- *Important communication services used*
- *Consumer perception of QoS across various touch-points*
- *Levels of satisfaction with overall service, prices, competitive nature of market etc.*
- *Role and involvement of the CRA in matters related to telecom*

Quantitative Phase: This phase aims at quantifying consumer views and opinions with regards to various products and services offered in the State of Qatar. The key objectives of this phase included:

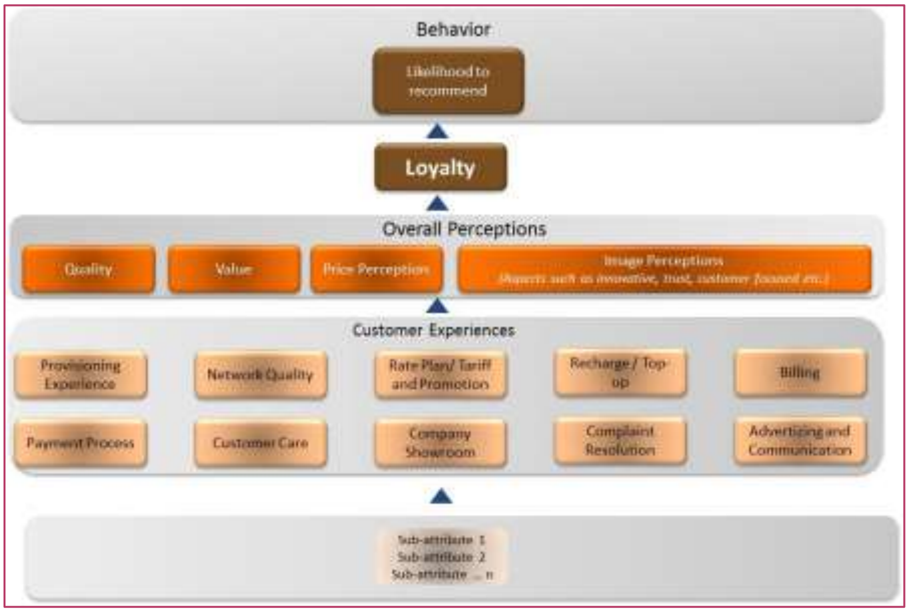
- *Assessing the extent of importance of some products/ services offered to consumers*
- *Consumers' level of awareness of CRA and suggestions for CRA*
- *Ascertain the degree and extent of loyalty of customers towards service providers*
- *Quantifying the performance of service providers across various products and services provided (such as provisioning, network, tariffs, customer care, recharging, billing & payment, among others)*
- *Understanding the key strength areas and focus areas (areas of improvement) for telecom sector (Specific to service providers, and by demographics, geographies etc.)*
- *Customers' usage of Social Media to engage with telecom service providers*
- *Customers' opinions about level of market competitiveness (in terms of services & prices)*

Social Media Research: Apart from understanding consumer usage of Social Media (specifically Telecom services), a separate Social Media research module was undertaken to holistically understand the usage of Social Media in Qatar by Service Providers to engage with telecom users. While on one hand, secondary sources were utilized to understand the prevalence of Social Media in Qatar, face-to-face meetings were also held between AMRB and the two Service Providers (Ooredoo and Vodafone) to understand their efforts in engaging with consumers through various Social Media platforms.

Some of the key objectives of this module are:

- *Understand the penetration of Social Media in Qatar*
- *Incidence and extent of usage of Social Media platforms by Service Providers*
- *Addressing customer queries/ complaints generated via Social Media (volumes & KPIs)*
- *Understanding future plans of Service Providers wrt consumer engagement via Social Media*

Figure 65: Walker Framework- As Customized For Telecom Services in Qatar



Exploratory Phase Discussion Details

Figure 66: Exploratory Phase- Internal Stakeholders Discussion Details

Team: National Broadband Plan

- **Purpose**: Understanding the National Broadband Plan and the KPI's that can be included in the Customer Satisfaction Survey

Team: CRA Policy team and Retail Tariff

- **Purpose**: Understand the policy implication on the survey and the inputs from the Retail Tariff team that need to be measured in Customer Satisfaction Survey

Team: Customer Complaints CRA

- **Purpose**: Understanding the complaint addressing mechanism process at CRA ; understanding the complaint tracking of Vodafone Qatar and Ooredoo; highlighting the main complaints received

Team: QoS Monitoring

- **Purpose**: Understanding the QoS Network measurement being conducted by CRA and the potential inclusion points in Customer Satisfaction survey

Team: MNP Team

- **Purpose**: Understanding the Mobile Number Portability prevalence in Qatar and the issues that were encountered in the launch; identifying the points to be measured in Customer Satisfaction Survey

Team: Retail Tariff Team

- **Purpose**: Clarification of the scope of the study and the potential Retail tariff parameters that can be included

Team: Communication Team of CRA

- **Purpose**: Understanding the scope of Social Media communication happening on behalf of CRA and also identifying the potential social media tracking objectives

Apart from the internal stakeholders, discussions also happened with the two service providers as well as QNBN, as illustrated in the figure below:

Figure 67: Exploratory Phase- External Stakeholder's Discussion Details

Team: Ooredoo Team

- **Purpose**: Understanding the product & service offerings of Ooredoo as well as understanding the operations and customer Care facilities available

Team: QNBN (Qatar National Broadband Network)

- **Purpose**: Understanding the product and service offerings of QNBN in the Qatar market. The scope of operation of QNBN was discussed and also the potential areas of interaction with customers Walker Information Repository

Team: Vodafone Qatar

- **Purpose**: Understanding the product and service offerings of Vodafone in the Qatar market. The scope of operation of Vodafone was discussed and also the potential areas of interaction with customers

Qualitative Research Details

The following mini groups were conducted as part of the qualitative phase

Table 52: Qualitative Study Details (1)

	Group 1	Group 2	Group 3	Group 4	Group 5
Location	Doha	Doha/ Industrial Area	Doha	Al Rayyan	Al Rayyan
Gender	Male	Male	Female	Male	Female
Nationality	Local Qatari	Expat Asians	Expat Asians	Expat Arabs	Expat Arabs
Age	18 to 25	25+ to 35	25+ to 35	35+ to 45	25+ to 35
Product/ Service Usage	Mobile (Voice + Data + Broadband)	Mobile (Voice + Broadband)	Fixed (Voice + Broadband)	Fixed (Voice + Broadband)	Mobile (Voice + Data)
Service Provider	Ooredoo	Ooredoo+ Vodafone	Ooredoo+ Vodafone (at-least 1 Vodafone user)	Ooredoo+ Vodafone (at-least 1 Vodafone user)	Ooredoo + Vodafone
Type of Connection	Prepaid+ Postpaid	Prepaid	Copper + Fibre (at least 1 user shifted from Copper to Fiber)	Copper + Fibre (at least 1 user shifted from Copper to Fiber)	Prepaid + Postpaid

Table 53: Qualitative Study Details (2)

	Group 6	Group 7	Group 8	Group 9
Location	Al Wakra	Al Wakra	Al Khor and Al Thakhira	Al Khor and Al Thakhira
Gender	Male	Male	Female	Male
Nationality	Expat Westerners	Local Qatari	Local Qatari	Expat Asians
Age	25+ to 35	35 +	35+ to 45	35+ to 45
Product/ Service Usage	Mobile (Voice + Data)	Fixed (Voice + Broadband)	Mobile (Voice + Data)	Mobile (Voice + Data + Broadband)
Service Provider	Ooredoo + Vodafone	Ooredoo+ Vodafone (at-least 1 Vodafone user)	Ooredoo + Vodafone	Vodafone
Type of Connection	Prepaid+ Postpaid	Copper + Fibre (at least 1 user shifted from Copper to Fiber)	Prepaid + Postpaid	Prepaid + Postpaid

Appendix II: Detailed Sample Distribution

Table 54: Sample Distribution by Municipality

Municipality	Sample Size
Al Daayen	7%
Al Khor and Al Thakhira	11%
Al Rayyan	12%
Al Shamal	7%
Al Wakra	11%
Doha	41%
Umm Salal	10%

Base: 2526 respondents

Table 55: Sample Distribution by Age

Age Group	Sample Size
15-24 years	14%
25-34 years	38%
35-44 years	30%
45-54 years	15%
Above 55 years	4%

Base: 2526 respondents

Table 56: Sample Distribution by Gender

Age Group	Sample Size
Male	78%
Female	22%

Base: 2526 respondents

Table 57: Sample Distribution by Nationality

Nationality	Sample Size
Qatari	9%
Non Qatari	91%

Base: 2526 respondents

Table 58: Sample Distribution by Income

Income Group	Sample Size
Above 40,000 QAR	2%
QAR 25,001 – QAR 40,000	4%
QAR 18,001 – QAR 25,000	5%
12,001 – 18,000 QAR	7%
6,001 – 12,000 QAR	15%
4,001 – 6,000 QAR	18%
2,001 – 4,000 QAR	19%
Below 2,000 QAR	12%
Refused	17%

Base: 2526 respondents

Table 59: Sample Distribution by Profession

Profession	Sample Size
Legislators, Senior Officials and Managers	6%
Professionals	17%
Technicians And Associate Professionals	9%
Clerks- typists clerks, book-keepers, accountants etc.	19%
Service Workers And Shop and Market Sales Workers	10%
Skilled Agricultural and Fishery Workers	1%
Craft and Related Trades Workers	8%
Plant and Machine Operators and Assemblers	5%
Elementary Occupations- Watchmen, night guards etc.	15%
Student	5%
Housewife	6%

Base: 2526 respondents

Table60: Sample Distribution by Service and Operator

Profession		Qatar- Overall	Ooredoo	Vodafone
Fixed	Fixed Voice	6%	8%	-
	Internet (Copper)	5%	7%	-
	Fibre Broadband	16%	20%	6%
Mobile	Mobile Voice	23%	21%	26%
	Mobile Voice+ Data	34%	30%	46%
	Data Specific SIM	8%	6%	11%
	Mobile Broadband	8%	7%	10%
Base		***4171***	***3009***	***1162***

** The percentages are calculated on response basis as some respondents answered for multiple services*

Appendix III: Weighting Factors

RIM weighting was conducted with following as universe proportions for weighting purposes.

Table 60: Weighting Factors

Universe	
Population type	% in Population
Transient	54.03%
Mainstream	45.97%
Total	**100.00%**
Transient Population	
Location	**Transient**
	% in Population
Al Daayen	2.92%
Al Khor and Al Thakhira	18.46%
Al Rayyan	17.91%
Al Shamal	0.38%
Al Wakra	9.76%
Doha	48.74%
Umm Salal	1.84%
Total	**100.00%**
Mainstream Population	
Location	**Mainstream**
	% in Population
Al Daayen	2.54%
Al Khor and Al Thakhira	11.41%
Al Rayyan	26.81%
Al Shamal	0.47%
Al Wakra	8.31%
Doha	46.89%
Umm Salal	3.56%
Total	100.00%
Operator and Service	
Ooredoo	% in Population
Mobile Voice	30.16%
Mobile Voice + Mobile Data	19.37%
Data Specific SIM	2.02%
Mobile Broadband (Dongle) /Mi-Fi	2.02%
Fixed Landline	9.17%
Internet Broadband (copper ADSL)	2.08%
Fibre Broadband	3.39%
Vodafone	
Mobile Voice	15.48%
Mobile Voice + Mobile Data	15.46%
Data Specific SIM	0.35%
Mobile Broadband (Dongle) /Mi-Fi	0.35%
Fixed Landline	
Internet Broadband (copper ADSL)	
Fibre Broadband	0.14%
Total	100.00%
Nationality (Y10: NATIONALITY)	
	% in Population
Qatari	10.04%
Non Qatari (Expat Arab, Expat Asian, Expat Westerner, Expat African)	89.96%
Total	100.00%

Appendix IV: Network Experience by Various Segments

Network: Availability and Spread- Perception on Various Parameters

Table 61: Experience With Network Availability And Spread: By Service Provider

Network Availability And Spread	Overall	Ooredoo	Vodafone
Availability of network all the time	93	94	90
Spread/ coverage	97	98	96
Quality of network coverage	96	95	98

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Network: Voice and SMS- Perception on Various Parameters

Table 62: Experience With Voice and SMS Services: Type of Service

Network- Voice and SMS	Overall	Fixed Line Mobile Voice	Mobile Voice	Mobile Voice+ Mobile Data
Voice quality & clarity	96	95	97	96
Lack of call drops	94	94	95	89
SMS delivery	96	NA	94	100

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 63: Experience with Voice and SMS Services: By Type of Connection

Network- Voice and SMS	Overall	Prepaid	Postpaid
Voice quality & clarity	96	95	96
Lack of call drops	94	91	96
SMS delivery	96	95	99

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 64: Experience with Voice and SMS Services: By Service Provider

Network- Voice and SMS	Overall	Ooredoo	Vodafone
Voice quality & clarity	96	95	96
Lack of call drops	94	94	91
SMS delivery	96	97	95

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Network: Data Services- Perception on Various Parameters

Table 65: Experience with Data Services Aspects: By Type of Connection

Data Services	Overall	Prepaid	Postpaid
Quality of data services	92	94	87
Data network coverage	94	96	87
Speed of data services	93	95	87
Video access/streaming quality	92	94	86

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 66: Experience With Data Services Aspects: By Service Provider

Data Services	Overall	Ooredoo	Vodafone
Quality of data services	92	90	95
Data network coverage	94	93	95
Speed of data services	93	92	94
Video access/streaming quality	92	90	93

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 67: Experience with Data Services Aspects: By Municipality

Data Services	Overall	Al Daayen	Al Khor & Al Thakhira	Al Rayyan	Al Shamal	Al Wakra	Doha	Umm Salal
Quality of data services	92	*	100	99	67	92	92	93
Data network coverage	94	*	99	98	83	99	94	98
Speed of data services	93	*	99	97	66	99	93	90
Video access/streaming quality	92	*	99	95	65	97	91	85

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers
**Low Base*

Appendix V: Provisioning Experience by Various Segments

Table 68: Experience with Provisioning: By Type of Connection

Provisioning	Overall	Prepaid	Postpaid
Ease of activation/ provisioning	88	86	92
Sales agent interacted with	98	97	96
Ease of purchasing the connection	98	98	99
Initial supply time	96	96	97
Minimum Service period for the product	97	97	97

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 70: Experience with Provisioning Experience: By Service Provider

Provisioning	Overall	Ooredoo	Vodafone
Ease of activation/ provisioning	88	90	85
Sales agent interacted with	98	97	97
Ease of purchasing the connection	98	98	99
Initial supply time	96	97	98
Minimum Service period for the product	97	98	97

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Appendix VI: Experience with Rate Plan/ Tariffs and Promotions by Various Segments

Table 69: Experience with Rate Plan/ Tariff and Promotions: Overall, Mainstream and Transient

Rate Plan/ Tariffs And Promotions	Overall	Mainstream	Transient
Clear Terms and Conditions	90	90	91
Clarity of rate plans	93	94	91
Variety of rate plans to meet your needs	81	86	77
Competitiveness of Tariffs	89	91	89
Tariffs of the different services and offers proposed	96	94	97
Publishing of tariff	91	91	91
Usefulness of benefits of promotions	90	92	89
Attractiveness of Promotion schemes	87	88	83

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 70: Experience with Rate Plan/ Tariff and Promotions: By Type of Connection

Rate Plan/ Tariffs And Promotions	Overall	Prepaid	Postpaid
Clear Terms and Conditions	90	89	91
Clarity of rate plans	93	93	93
Variety of rate plans to meet your needs	81	77	89
Competitiveness of Tariffs	89	89	93
Tariffs of the different services and offers proposed	96	96	93
Publishing of tariff	91	91	91
Usefulness of benefits of promotions	90	89	91
Attractiveness of Promotion schemes	87	85	88

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 71: Experience with Rate Plan/ Tariff and Promotions: By Service Provider

Rate Plan/ Tariffs And Promotions	Overall	Ooredoo	Vodafone
Clear Terms and Conditions	90	91	90
Clarity of rate plans	93	91	93
Variety of rate plans to meet your needs	81	83	80
Competitiveness of Tariffs	89	89	91
Tariffs of the different services and offers proposed	96	95	97
Publishing of tariff	91	90	92
Usefulness of benefits of promotions	90	90	90
Attractiveness of Promotion schemes	87	87	85

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 72: Experience with Rate Plan/ Tariff and Promotions: Type of Service

Rate Plan/ Tariffs And Promotions	Overall	Fixed			Mobile			
		Fixed Line	Internet (copper)	Fibre broadband	Mobile Voice	Mobile Voice+ Mobile Data	Data Specific SIM	Mobile broadband
Clear Terms and Conditions	90	91	56	95	91	92	91	91
Clarity of rate plans	93	91	57	98	93	93	93	97
Variety of rate plans to meet your needs	81	87	55	94	81	83	90	71
Competitiveness of Tariffs	89	89	59	96	91	89	89	95
Tariffs of the different services and offers proposed	96	92	59	97	96	97	94	99
Publishing of tariff	91	89	56	96	90	91	88	96
Usefulness of benefits of promotions	90	90	58	96	90	91	91	89
Attractiveness of Promotion schemes	87	86	56	96	87	87	88	76

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

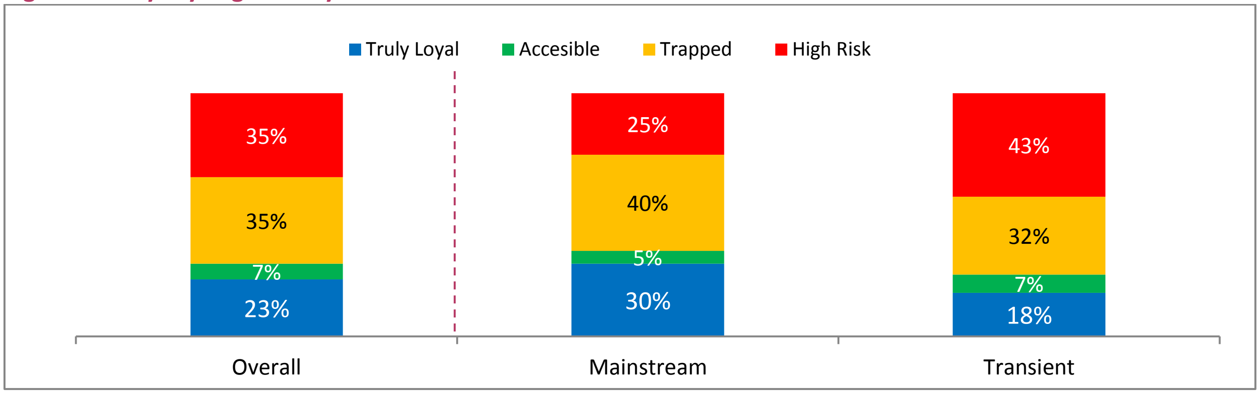
Table 73: Experience with Rate Plan/ Tariff and Promotions: By Age, Gender and Nationality

Rate Plan/ Tariffs And Promotions	Overall	Age			Gender		Nationality	
		15-24 years	25-44 years	45 and beyond	Male	Female	Qatari	Non Qatari
Clear Terms and Conditions	90	82	91	92	91	92	91	90
Clarity of rate plans	93	85	94	95	93	93	91	93
Variety of rate plans to meet your needs	81	82	81	86	81	85	88	81
Competitiveness of Tariffs	89	83	90	92	90	91	90	90
Tariffs of the different services and offers proposed	96	86	97	95	97	93	92	96
Publishing of tariff	91	85	91	92	90	91	90	90
Usefulness of benefits of promotions	90	85	90	94	90	92	90	90
Attractiveness of Promotion schemes	87	85	85	88	86	90	87	86

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

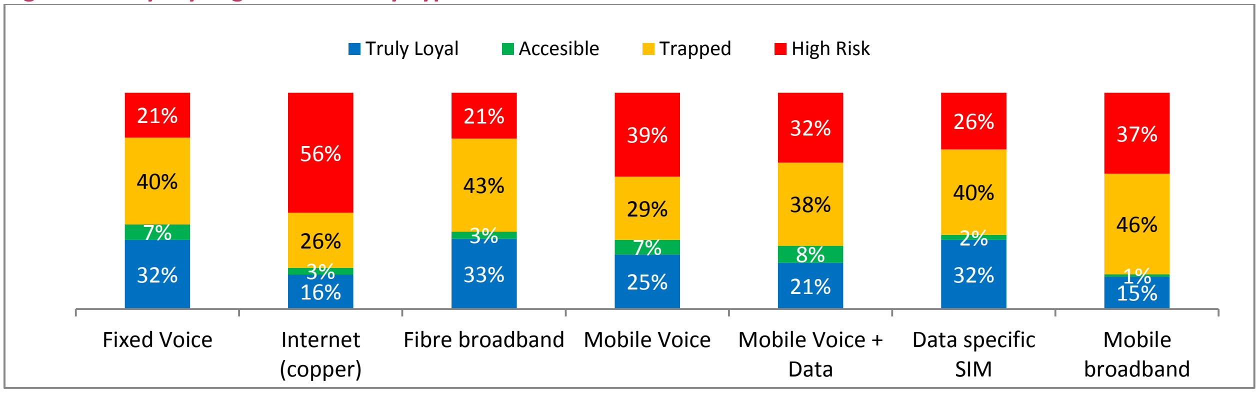
Appendix VII: Loyalty Segmentation by Various Segments

Figure 68: Loyalty Segment by Mainstream and Transient



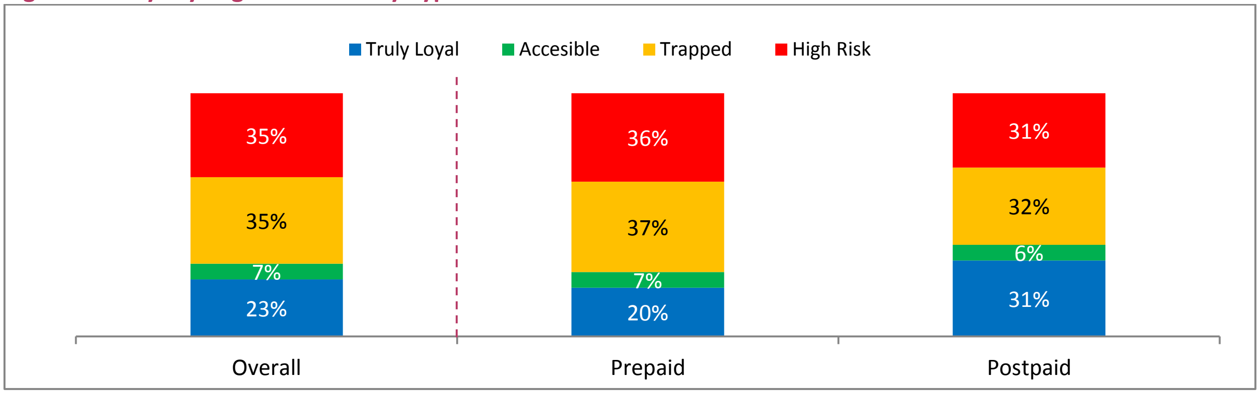
Source: Customer Satisfaction Survey; Overall sample=2526

Figure 69: Loyalty Segmentation: By Type of Service



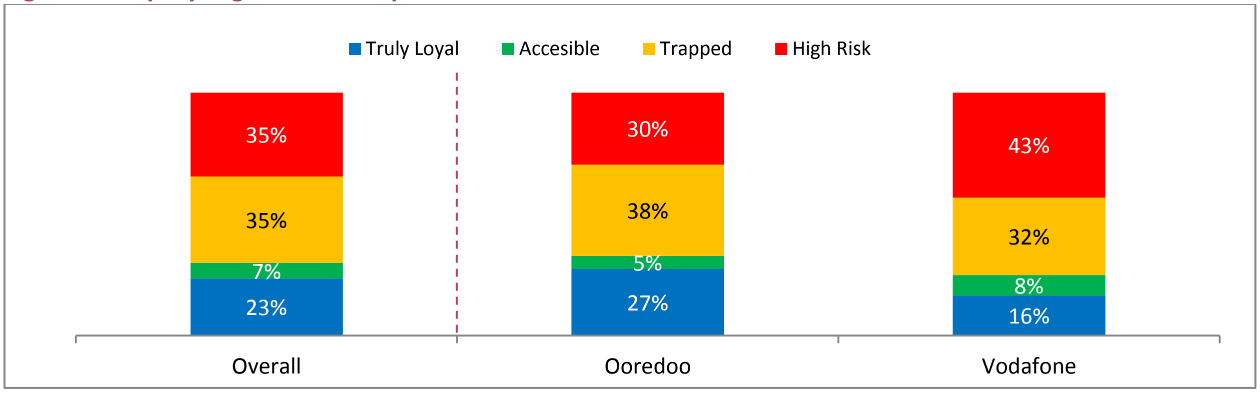
Source: Customer Satisfaction Survey; Overall sample=2526

Figure 70: Loyalty Segmentation: By Type of Connection



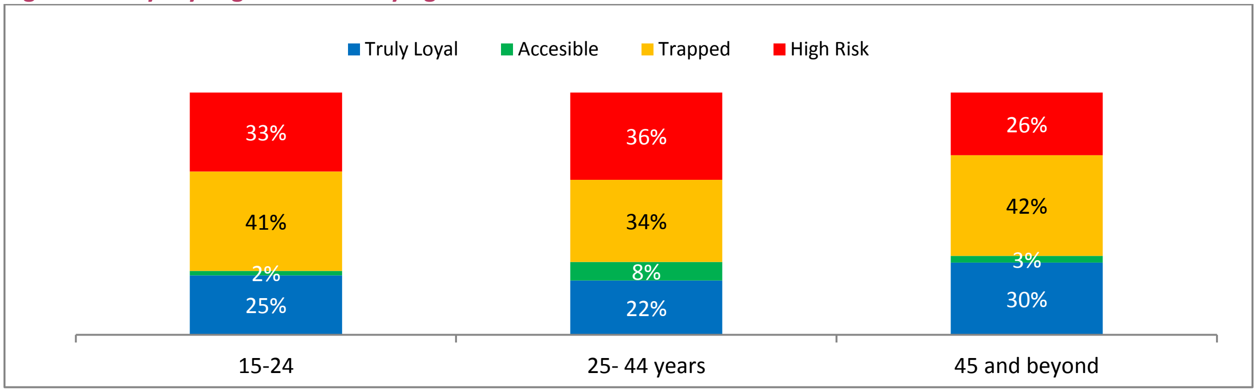
Source: Customer Satisfaction Survey; Overall sample=2526

Figure 71: Loyalty Segmentation: By Service Provider



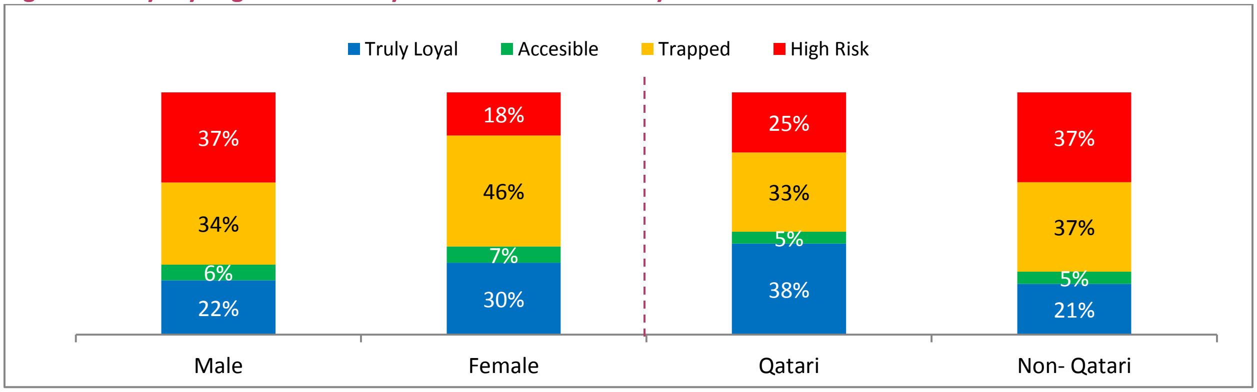
Source: Customer Satisfaction Survey; Overall sample=2526

Figure 72: Loyalty Segmentation: By Age



Source: Customer Satisfaction Survey; Overall sample=2526

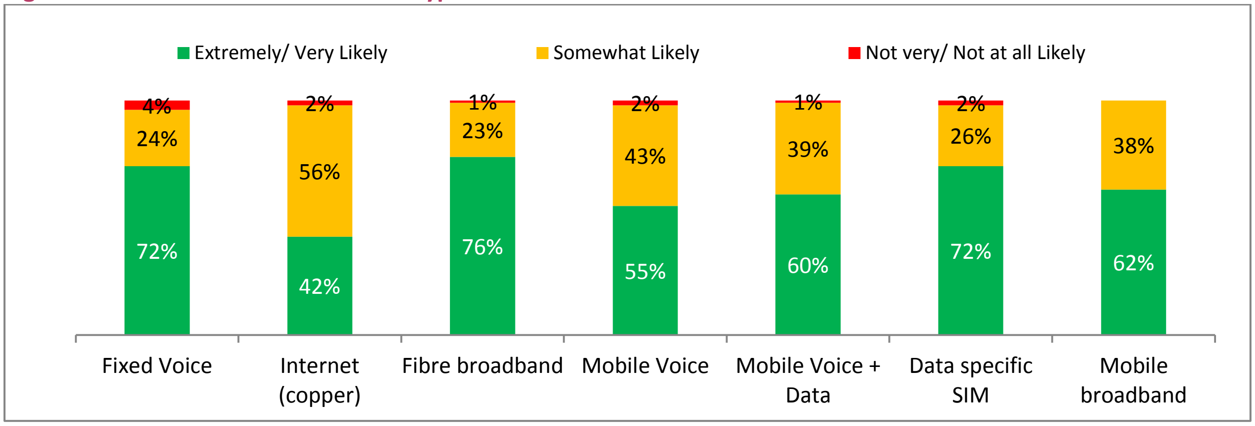
Figure 73: Loyalty Segmentation: By Gender and Nationality



Source: Customer Satisfaction Survey; Overall sample=2526

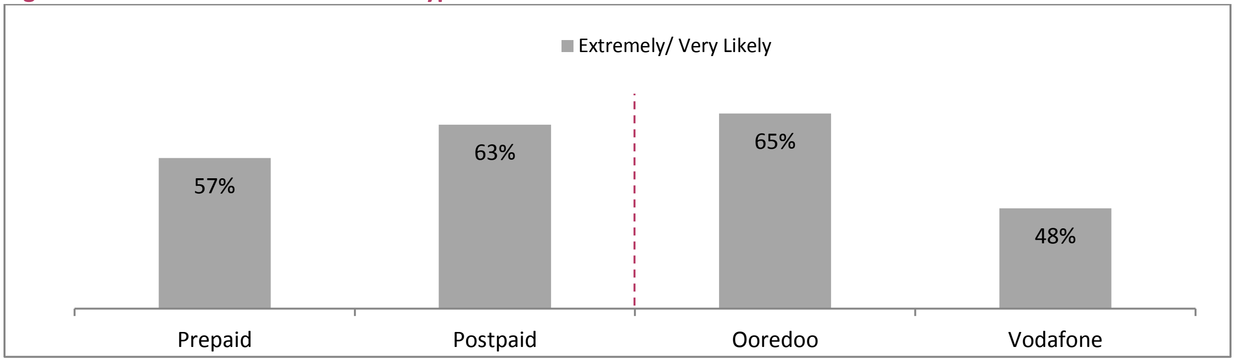
Appendix VIII: Intention to Recommend by Various Segments

Figure 74: Intention to Recommend: Type of Service



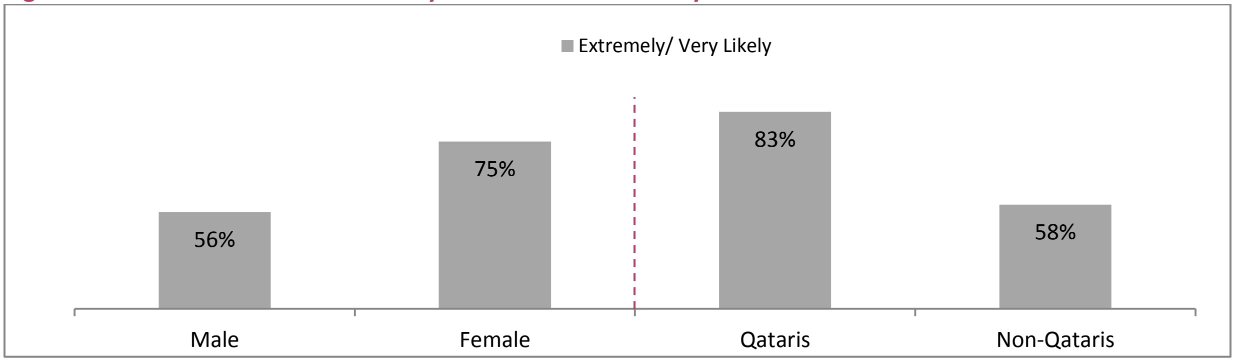
Source: Customer Satisfaction Survey; Overall sample n=2526

Figure 75: Intention to Recommend: Type of Connection and Service Provider



Source: Customer Satisfaction Survey; Overall sample n=2526

Figure 76: Intention to Recommend: By Gender and Nationality



Source: Customer Satisfaction Survey; Overall sample n=2526

Appendix IX: Experience with Company Outlet by Various Segments

Table 74: Experience with Company Outlet: By Type of Connection

Company Outlet	Overall	Prepaid	Postpaid
Politeness and courtesy shown by the executives	92	89	96
Ability to resolve query / problem	95	94	96
Time taken to resolve query / problem	96	97	98
Time taken to assist you	96	96	95
Knowledge of personnel	98	98	99

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 75: Experience With Company Outlet: By Service

Company Outlet	Overall	Fixed			Mobile			
		Fixed Line	Internet (copper)	Fibre broadband	Mobile Voice	Mobile Voice+ Mobile Data	Data Specific SIM	Mobile broadband
Politeness and courtesy shown by the executives	92	94	94	98	90	95	97	85
Ability to resolve query / problem	95	93	94	92	95	94	95	97
Time taken to resolve query / problem	96	95	95	98	98	97	94	97
Time taken to assist you	96	92	93	91	99	95	91	96
Knowledge of personnel	98	96	97	99	98	99	97	97

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 76: Experience with Company Outlet: By Age, Gender and Nationality

Company Outlet	Overall	Age			Gender		Nationality	
		15-24 years	25-44 years	45 and beyond	Male	Female	Qatari	Non Qatari
Politeness and courtesy shown by the executives	92	93	91	91	92	92	96	92
Ability to resolve query / problem	95	92	95	95	95	94	91	95
Time taken to resolve query / problem	96	91	97	96	97	96	88	97
Time taken to assist you	96	91	97	96	96	95	91	97
Knowledge of personnel	98	94	100	99	98	97	95	98

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Appendix X: Experience with Customer Care/ Call Center by Various Segments

Table 77: Experience with Customer Care: By Age, Gender and Nationality

Customer Care Call Center	Overall	Age			Gender		Nationality	
		15-24 years	25-44 years	45 and beyond	Male	Female	Qatari	Non Qatari
Time taken to solve query/problem	88	76	90	94	88	83	78	88

Figures above represent proportion (%) of satisfied consumers

Source: Customer Satisfaction Survey; Overall sample n=2526

Question asked specifically to those calling in last 6 months (n=1089)

Appendix XI: Experience with Billing by Various Segments

Table 80: Experience with Billing: Type of Service

Billing Process	Overall	Fixed Line	Internet (copper)	Fibre broadband	Mobile Voice	Mobile Voice+ Mobile Data	Data Specific SIM	Mobile broadband
Regularity of receiving bills i.e. every month	99	98	99	99	99	100	97	100
Ease of understanding the bill statement	99	99	99	99	99	100	98	100
Accuracy of the bill amount	97	96	96	99	94	99	98	99

Figures above represent proportion (%) of satisfied consumers

Source: Customer Satisfaction Survey; Overall sample n=2526

Parameters are arranged in order of importance to consumers

Table 78: Experience with Billing: By Age, Gender and Nationality

Billing Process	Overall	Age			Gender		Nationality	
		15-24 years	25-44 years	45 and beyond	Male	Female	Qatari	Non Qatari
Regularity of receiving bills i.e. every month	99	97	99	99	98	99	96	100
Ease of understanding the bill statement	99	97	99	98	99	98	97	99
Accuracy of the bill amount	97	96	97	95	98	95	95	97

Figures above represent proportion (%) of satisfied consumers

Source: Customer Satisfaction Survey; Overall sample n=2526

Parameters are arranged in order of importance to consumers

Appendix XII: Experience with Payment by Various Segments

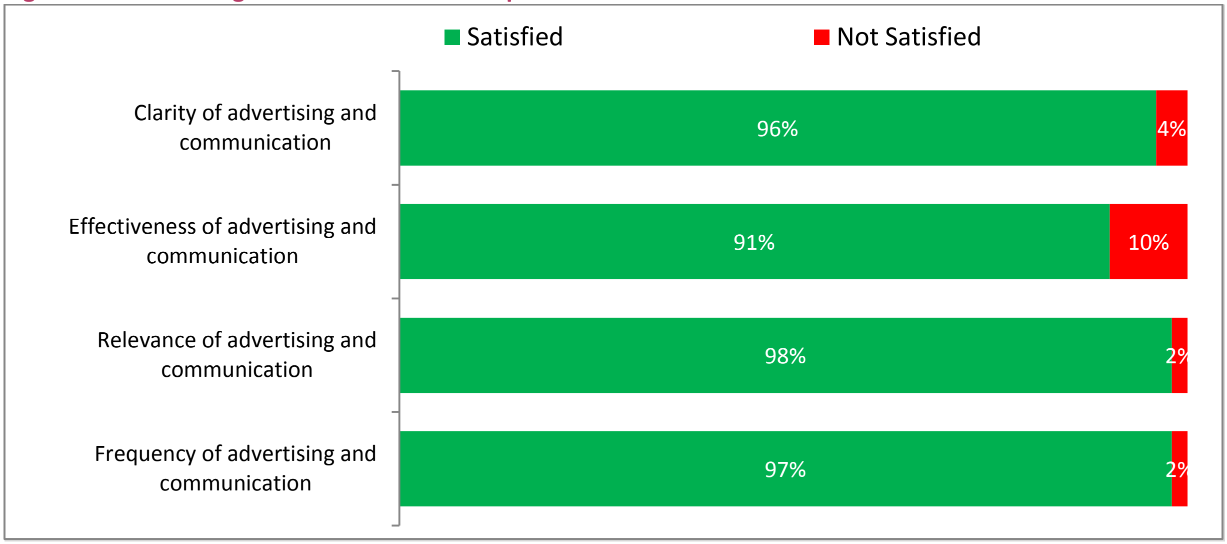
Table 79: Experience with Payment: By Age, Gender and Nationality

Payment Process	Overall	Age			Gender		Nationality	
		15-24 years	25-44 years	45 and beyond	Male	Female	Qatari	Non Qatari
Experience with payment modes	99	98	100	100	100	98	98	100
Adequacy of the locations at which payment can be made	98	97	98	99	99	98	94	100

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Appendix XIII: Advertising and Communication Experience

Figure 77: Advertising and Communication Experience: Overall



Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Table 80: Experience with Advertising & Communication: By Operator

Advertising & Communication	Overall	Ooredoo	Vodafone
Clarity of advertising and communication	95	96	95
Effectiveness of advertising and communication	91	91	89
Relevance of advertising and communication	97	97	98
Frequency of advertising and communication	97	97	97

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey; Overall sample n=2526
Parameters are arranged in order of importance to consumers

Appendix XIV: Complaint Resolution Process- Analysis of Complaints/Feedbacks through Arsel and Hukoomi

Table 81: Feedback through Arsel on Network Issues: By Service Provider

Complaint on Network Issues	Ooredoo	Vodafone
Poor Coverage Indoor	47%	34%
Poor 4G Coverage	22%	10%
No 4G Coverage	7%	5%
Poor Coverage Outdoor	7%	13%
Dropped Calls	5%	5%
Poor 3G Coverage	5%	24%
No Signal	4%	6%
Others	4%	2%
Total Number of Network Related Complaints/feedbacks	**83**	**82**

Source: Arsel data provided by CRA

Table 82: Complaints through Hukoomi on ADSL for Ooredoo

ADSL Related Complaints	Ooredoo
ADSL Installation/ Activation	42%
Land line	15%
Fixed Line/ADSL Transfer	13%
ADSL Internet	12%
All Services	8%
Mozaic TV+	8%
Hardware Problems	2%
Total Number of ADSL Complaints	**193**

Source: Hukoomi data provided by CRA

Table 83: Complaints through Hukoomi on Mobile for Ooredoo

Mobile Related Complaints	Ooredoo
Postpaid Billing	30%
Unauthorized disconnection	21%
Network	14%
Broadband (Data)	7%
Promotions	7%
Others	21%
Total Number of Mobile Complaints	**182**

Source: Hukoomi data provided by CRA

Table 84: Complaints through Hukoomi on Mobile for Vodafone

Mobile Related Complaints	Vodafone
Unauthorized disconnection	52%
Postpaid Billing	22%
Network	7%
Others	19%
Total Number of Mobile Related Complaints	**459**

Source: Hukoomi data provided by CRA

Appendix XV: References

- Qatar's ICT Landscape 2014 Report (Households and Individuals)
- Qatar Telecommunications Report Q2 2014- BMI
- Walker Stakeholder Research Database
- Consumer Awareness and Satisfaction Survey 2014 – iDA Singapore
- Ofcom – The Communication Market Report, 7th August 2014
- ACMA – Communication Report 2014
- ICT in the UAE Household Survey, 2014
- Labor Force Survey: The Third quarter (July – September) 2014 – Ministry of Development Planning and Statistics
- Population, Housing & Establishments Census April 2010- – Ministry of Development Planning and Statistics
- Subscription numbers for Ooredoo and Vodafone from CRA
- Media Use in the Middle East An Eight-Nation Survey conducted by Northwestern University in Qatar in association with Harris Interactive
- The state of Broadband 2013: Broadband Commission, September 2013, ITU
- http://www.ictqatar.qa/sites/default/files/web_infographic.pdf
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- Website: Rollout of MNP http://www.ictqatar.qa/en/news-events/news/mobile-number-portability-services-rollout-qatar

Appendix XVI: How to Read the Report

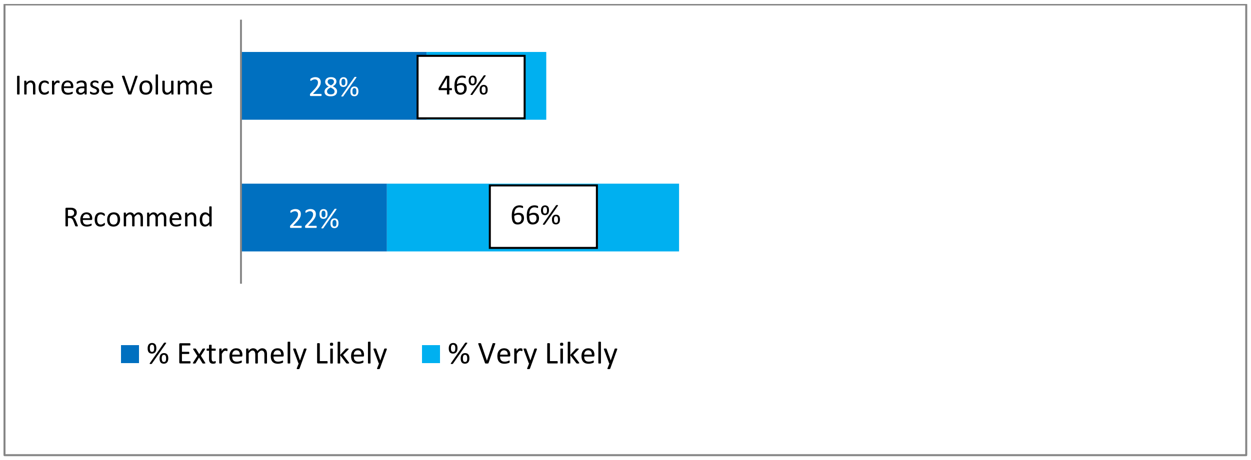
Table 85: Rating Scales Used for the Study

Satisfied			Not Satisfied	
Excellent	Very Good	Good	Fair	Poor
Very High Priced	High Priced	Moderately Priced	Low Priced	Very Low Priced
Excellent Value for Money	Very Good value for Money	Good Value for Money	Fair Value for Money	Poor Value for Money
Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
Not at all likely	Not very likely	Somewhat likely	Very likely	Extremely Likely

Performance Scores

- Walker Information uses a five-point verbally labeled rating scale when asking customers to respond to a particular question
- Walker Information examines the distribution of responses (i.e., the percentage of customers giving a response to each scale point) to draw conclusions about the performance from the customer's point of view
- Besides the percentages associated with each scale point, several other summary statistics are computed. Top-2 Box scores (e.g., percentage extremely and very likely) are a commonly reported statistic
- The graph below shows performance scores for two measures including *Likelihood to Recommend* and *Increase Volume*
    - The Top-2 Box score for recommend is 66%

Looking at each box separately, 22% of customers are extremely likely to recommend and 44% (i.e., 66%–22%) are very likely.



Statistics Used

- Significance testing: A tool used to determine if significant differences exist between two sample measures (e.g., top-two-box scores or means).
- Statistical testing is important because it shows whether differences observed in the measures are truly different, or if they may be attributable to chance. Significance tests tell us whether it can be assumed if differences really exist. It cannot be used to establish whether the difference is *meaningful*.
- Confidence Level: An interval, in the form of a percent, which shows the probability of the results not occurring randomly. A confidence level is determined prior to a statistical test being performed, and is normally defined as 90 or 95%.
- The confidence level indicates how confident it is that a true difference exists between two measures. The higher the confidence level is, the less chance there is of drawing an incorrect conclusion. The error, or significance level, is 1-confidence level. So, if tests are run with a 95% confidence level, there is a 5% chance that an incorrect conclusion will be drawn.
- If a test is performed at a 95% confidence level, it means that if 100 pairs of similar samples were taken, 95 of them would have the same the result. Five of them (5%) would not, thus the 5% error.
- Precision: The discrepancy, attributable to random sampling error, between the sample outcome and its expected value. The greater the discrepancy, the lower the precision.
- Correlation Analysis:
    - Correlation analysis is conducted when the sample size is too small for regression (less than 40 responses) or when there is only one independent variable.
    - Measures the degree of association between two variables.
    - Correlation coefficients can be interpreted similarly to regression coefficients. Correlation coefficients tend to be larger in magnitude than regression coefficients.
    - Unlike regression, there is no statistical control for the inter-relationships among the independent variables.
    - Coefficients range in value from negative one to positive one. A zero indicates no relationship and a one indicates a perfect positive relationship between the two variables, meaning as the independent variable increases or decreases, the dependent variable will move the same direction.
- Factor Analysis:

- Used for data reduction and summarization. Looks at the inter-relationships among several variables and identifies a smaller number of common underlying dimensions or factors

- In the example below, six image questions can be represented with three factors or dimensions. The first three questions represent a customer-oriented factor, the next two questions represent a leadership factor, and the last question represents an environmentally responsible factor. These three factors can be used to accurately represent the six questions

- Key Driver Analysis:
  - Multiple regression analysis is used to quantify the relationship between a single dependent measure and one or more independent measures
  - A weight is calculated for each independent variable to indicate the "unique" impact a particular variable has in predicting the dependent measure
  - The weight (i.e., regression coefficient) represents the expected change in the dependent variable for a one unit change in a given predictor, all else constant
  - Multiple regression analysis statistically controls for the inter-relationships among the explanatory variables
  - All variables are standardized to control for scale and dispersion differences. The end result is a set of impact coefficients which can be ranked and compared to one another
- Total Effects
  - Total effects analysis simplifies interpretation of the model by summarizing the effects of the overall measures, processes, and attributes on customer loyalty.
  - An arrow between any two boxes in the model indicates a direct relationship or path between a predictor and a dependent measure.
  - Variables can also have indirect relationships with other variables in a causal model. For instance, *Quality* can also impact customer loyalty indirectly through *Value*.
  - The **sum** of the direct relationship and all indirect relationships is referred to as the total effect of one variable on another

Walker's Stakeholder Relationship Database (SRD)

- Walker Information has over 60 years of market research experience of which about 30 years is in conducting customer satisfaction related research for many clients around the world. This wealth of experience has been recorded in the Stakeholder Relationship Database (SRD). The SRD contains "normative" data of customer behaviors, attitudes and experiences with company products and services.

- The SRD allows one to understand the high and low norms in their industry or simply, the "world class" customer satisfaction and loyalty numbers achieved by some of the best companies around the world.