Communications Regulatory Authority
State of Qatar
هيئة تنظيم الاتصالات
دولة قطر

CONFIDENTIAL

CUSTOMER SATISFACTION STUDY, 2018-SURVEY FINDINGS

October 2019

Report Submitted by Memac Ogilvy and Kantar AMRB

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List of Abbreviations

CAPI: Computer Assisted Personal Interviewing

CRA: Communications Regulatory Authority

ICT: Information and Communication Technology

ITU: International Telecom Union

MOTC: Ministry of Transport and Communications

MDPS: Ministry of Development Planning and Statistics

MENA: Middle East & North Africa

QoS: Quality of Services

RIM: Random Iterative Method

SIM: Subscriber Identity Module

VAS: Value Added Services

List of Definition

Overall Population: Includes all residents of the state of Qatar across all ethnicities, age groups (over 15 years), industries employed in, and education levels.

Mainstream Population: Includes all residents of the state of Qatar who do not reside in the labor accommodations.

Transient Population: Includes all residents of the state of Qatar who reside in labor accommodations.

Rate Plan: A rate plan is part of a subscription or an amendment to a subscription, and it comes from a product rate plan. Like a product and its product rate plans, a subscription can have one or more rate plans. Rate plans are sometimes called subscription rate plans.

2. BACKGROUND

The Communications Regulatory Authority (CRA) of Qatar was established by Emiri Decree (42) in 2014, bringing Qatar in line with regional and global countries in having an independent authority to regulate Telecoms, Information Technology, Postal services and digital media access. CRA encourages and supports an open and competitive Information & Communications Technology (ICT) sector, which provides advanced, innovative and reliable communications services for the state of Qatar. Balancing the rights of customers with the needs of service providers is at the heart of the CRA's activities.

CRA will continue to ensure that individuals, businesses, and government have access to a broad range of innovative and reasonably priced communications services. The CRA uses its full range of regulatory powers to ensure that competition in the communications sector thrives and customer rights are protected.

An Emiri decree gives CRA mandate to:

- regulate the communications sector,
- ensure the efficient management and allocation of scarce resources such as radio spectrum, numbering, and domain names
- protect customers from misleading and unfair practices
- set quality of service standards and monitor compliance
- manage a dispute resolution system that is transparent, fair, speedy, and effective

The CRA conducted research in 2014 to understand general customer experience of communication services in the country, the results of which were used to develop policies aimed at improving the customer experience. 2018 saw the CRA commission Memac Ogilvy and Kantar AMRB to conduct a comprehensive Customer Satisfaction Survey involving both qualitative and quantitative methodologies to evaluate telecom service providers and make any further recommendations to improve services. The telecom services covered by the survey and this report are:

- Mobile Voice: Voice accessed through mobile, either feature phones or smartphones
- Mobile Internet: Internet accessed through mobile devices (smartphone, dongle such as Mi-FI etc. or data specific sim in tablets or other devices)
- Fixed Voice: Voice accessed through landline telephones
- Fixed Internet: Internet accessed through fixed broadband by wire or Wi-fi

However, the research done did not include TV or radio services.

2.1. Research Objectives

Key objectives of the research include:

- Understanding customer experience across the full spectrum of services and providers and how these vary among different customer
- Gauging satisfaction levels in terms of:
- Quality of Service (QoS)
- Pricing
- The Retail experience
- The Billing experience

- Complaints handling experiences
- Roaming services
- International calls
- Understanding customer's experience with their communication service provider along their journey across touch points with the view to improve the quality of service;
- Understanding customer perceptions around CRA's core business such as:
- State of competition in the country in terms of both pricing and services.
- Perceived role of CRA in the market.

2.2. Research Methodology

Researchers from Kantar AMRB designed a four-phase approach to seek insights around market requirements and drivers as well as validating the hypothesis through a large sample survey. The four phases were as follows:

- Exploratory phase (among CRA stakeholders and service providers)
- Secondary research phase
- Primary research - Qualitative phase (among customers)
- Primary research - Quantitative phase (among customers)

Exploratory Phase

Research experts began by gauging key stakeholder (internal and external) opinion, perceptions, initiatives, need-gaps and expectations through in-depth-interviews with the following CRA departments: Regulation Affairs & Competition, Consumer Affairs, Legal Affairs Unit, Planning and Quality Unit, Technical Affairs and Spectrum Management. Researchers carried out further interviews with both service providers, Ooredoo and Vodafone, using semi-structured discussion guides moderated over by experts with sound understanding of the sector.

Secondary Research

Well-designed insights projects require robust secondary research work to ensure a complete understanding of the marketplace. To this end, researchers conducted the following works.

- Data collection on: Demographics, service subscribers, CRA legal and policy frameworks and Key ICT projects from various government sources including MDPS and MOTC. which was used to develop: the sampling plan, weighting approach and to inform finding projections.
- International benchmarking research through publicly available government websites around the world in addition to reports from both international and domestic sources.
- Consumer satisfaction international benchmarking data from the following countries:
    - Australia: ACMA – Communications Report 2016-17[1]
    - Bahrain: Consumer Experience Survey Report 2015[2]
    - UAE: Customer Satisfaction Survey - Households - 2016[3]

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1 https://www.acma.gov.au/theACMA/communications-report
2 http://www.tra.org.bh/en/media/consumer-and-business-surveys/
3 https://www.tra.gov.ae/en/open-data/information-and-communication-techinology-surveys.aspx

- UK: Ofcom – Customer-service-tracker-2018[4]

Specialists selected the above countries to give both a regional and global comparison in customer satisfaction levels in conjunction with survey frequency rates from different regulators. The choice of the countries for benchmark is based on multiple factors: regional benchmarking among countries having similar country profile, comparison with advanced economy, frequency of studies conducted by the countries.

UAE and Bahrain were chosen because they are very similar economies and in the region. The profile of the customers is very similar in the markets with high expatriate population. Further, Bahrain regularly conducts customer satisfaction survey across all services and publishes. Australia and UK are chosen for advanced quality of service in communication services and can be used for benchmarking purposes.

Qualitative Phase

To understand the importance of various communication services among customers and to measure customer levels of satisfaction around receipt and delivery of quality of services, perceptions on price and competitiveness of the market, specialists conducted qualitative research through 10 mini focus groups (consisting of 4- 5 members in group) covering different customer segments. Further details of this research phase are included in the Appendix. The inputs from the exploratory phase and qualitative phase were used as base to finalize the scope of the quantitative phase. Further, the inputs from these phases were used as inputs in developing the questionnaire in the quantitative phase.

Quantitative Phase

To quantify customer satisfaction in the country, research experts conducted a large-scale quantitative survey across a sample of 2,362 telecom product users, of which 1,971 from the Mainstream segment and 391 from the transient population. These interviews took place between June 24, 2018 and August 24, 2018 in both English and Arabic depending on the respondents' choice.

The overall confidence level in the sample's findings were 95% with an error margin of +/- 3% across the entire population. Researchers interviewed across different population segments including the transient population. In order to avoid a skew from the transient population, researchers devised a quota based sampling method, thereby ensuring an adequate distribution across categories such as:

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

The sample distribution as per each of the categories is presented in Appendix I.

A 30-minute survey consisting of closed-ended questions and a limited number of open-ended questions was administered using CAPI (Computer Aided Personal Interview) methodology to customers.

Based on the usage of services, the researchers designed the program to obtain feedback from the mainstream population for all four services in the scope of the study: Mobile Voice, Mobile Internet, Fixed Voice and Fixed Internet, while, the feedback from the transient population was obtained for Mobile Voice and Mobile Internet.

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[4] https://www.ofcom.org.uk/__data/assets/pdf_file/0021/112287/Customer-service-tracker-2018-data-tables.pdf

Data Weighing Approach

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
- Nationality (Qatari and Non-Qatari)
- Gender

The weighting factors were obtained from published figures of MDPS. Details of the weighting parameters are included in the Appendix I.

The sampling approach and further data weighing ensure that results of this survey are representative of the overall customer base in Qatar.

Target respondent base

A target respondent is eligible to respond if actively using any of the following communication services as per definitions below:

- Mobile Voice: An active user (accessed the service in the past 3 months) of mobile voice services involved in recharge or bill payment, contacting call center etc. In case the customer has multiple connections, the primary connection (based on customer perception) is considered for the survey.
- Mobile Internet: An active user (accessed the service in the past 3 months) of mobile internet service through various devices, involved in recharging or bill payment, contacting call center etc. In case the customer has multiple connections, the primary connection based on customer perception is considered for the survey.
- Fixed Voice: An active user (accessed the service in the past 3 months) of household fixed line, involved or aware of bill payment, complaint resolution etc. The user should be part of mainstream population.
- Fixed Internet: An active user (accessed the service in the past 3 months) of household fixed internet connection (either through copper or fiber fixed network) involved or aware of bill payment, complaint resolution etc. The user should be part of mainstream population.

2.3. Report Outline

This report presents the findings of the communications services customers' satisfaction survey with communication services in the State of Qatar, including QoS and network quality experience, pricing, provisioning, complaint resolution, billing and payment process, international calling and roaming services. Further, customers' perception on competitiveness among the communication service providers is also presented in this report.

This report presents the findings of customer satisfaction survey at an overall level. Also, wherever relevant, the findings are reported by Mainstream and Transient population, geographical location, nationality, gender, age group, service provider, type of service or any other relevant sub segmentation.

The key findings presented in the report include overall satisfaction levels on:

- QoS of all communication services
- Network related parameters
- Pricing and tariff related parameters

- Purchase and activation process
- Complaint resolution
- Billing and payment process
- Roaming Services
- International calling
- Perception on market competitiveness
- Perception on Postal service

Further, considering various global norms and discussions with telecom experts, the report uses the following grouping and classification

Services with less than 5% dissatisfaction:	Excellent
Services with 6% to 10% dissatisfaction:	Acceptable (Maintain status quo)
Services with 11% to 15% dissatisfaction:	Need minor intervention by the Regulator
Services with more than 15% dissatisfaction:	Need significant intervention by Regulator

3. QATAR DEMOGRAPHICS AND TELECOMMUNICATION MARKET OUTLOOK

3.1. Qatar Demographics outlook

Qatar is the 7th largest economy in MENA, with GDP of 188.3 billion USD. GDP per capita (on a purchasing power parity basis) has also risen rapidly to make Qatar officially the wealthiest country in the world – IMF data for 2018 put GDP per head on a PPP basis at US$128,703.5

In terms of demographics, Qatar is the second least populous country among the Gulf States. The population of Qatar is 2.6741 million in 2018 with more than 60% of the population classified as transient due to their stay at labor camps[6]. Qatar's demographic structure is characterized by the large share of the working age group (85% of population), majority of whom are expatriate workers. The population of Qatar is quite unique with more than 85% expat population and almost 75% male population. Qatar population is considerably younger with 40% of the population in 25-34 age group. These unique demographics has an impact on the access and usage of ICT and is reflected in the trend of mobile phone usage – for example, due to higher share of transient laborers, Qatar has more than 75% usage of prepaid phones among its population.

3.2. Telecom sector in Qatar

Qatar is being positively seen in telecommunication space with a ranking of 27th globally (out of 139 countries) and second among Arab countries in the Global Information Technology Report's (GITR) Networked Readiness Index, 2016. The in-depth analysis of the global landscape conducted by the World Economic Forum indicates that the development of Qatar's telecommunications infrastructure is on par with that of comparable high-income countries.

The communications service providers operating in Qatar are offering a broad range of services to individuals, businesses and the government entities. Currently, there are two network and service providers, Ooredoo Qatar and Vodafone Qatar, providing both mobile and fixed services in the country.

Competition in the mobile market has clearly taken hold in Qatar and both Ooredoo and Vodafone provide national coverage via 2G, 3G, 4G and 5G services. Competition has not yet taken hold in the fixed market. Ooredoo has deployed its fiber-to-the-home (FTTH) network, which now covers 99% of the country. Vodafone is offering broadband services in limited areas like The Pearl Qatar, Lusail city, Barwa city and Westbay[7].

In February 2017, Ooredoo commercially launched 4.5G LTE-Advanced Pro (LTE-A Pro) technology across their networks, followed by Vodafone in May, in partnership with Huawei Technologies and Nokia, respectively, to augment their existing commercial LTE-A 4G+ services.

Qatar has taken an early lead in the roll out of 5G mobile services, with the country's two operators, Ooredoo and Vodafone Qatar, both launching their next generation networks in 2018. Having run initial test services in May, Ooredoo announced at the end of July 2018 that it had successfully launched 5G services at 50 network stations across the country, making it the first company in

5 http://statisticstimes.com/economy/projected-world-gdp-capita-ranking.php

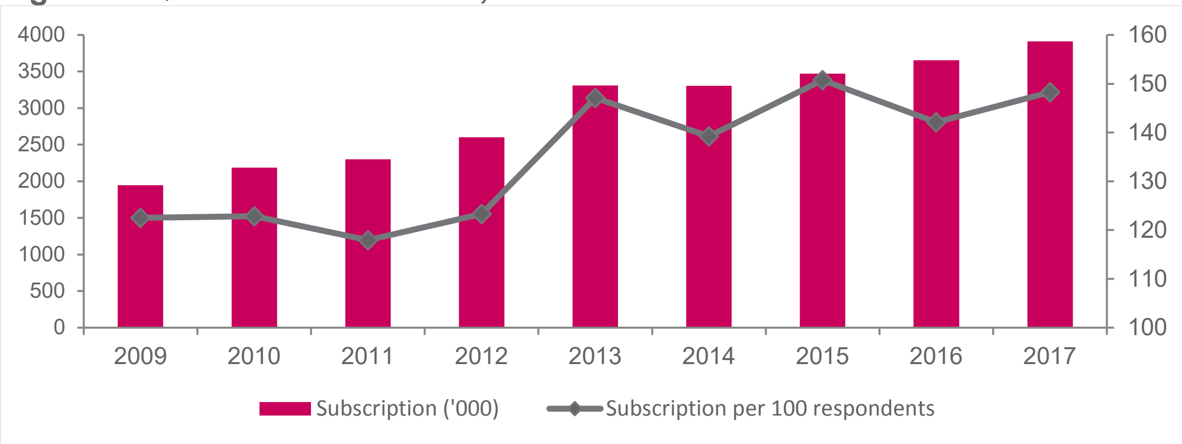
6 Ministry of Development, Planning and Statistics, website and population first section 2016 https://www.mdps.gov.qa/en/statistics1/StatisticsSite/pages/population.aspx

7 https://www.vodafone.qa/en/internet#fixedservices

the world to roll out a commercially available 5G network. In August 2018 Vodafone Qatar switched on its own 5G service, with its first enterprise customer, submarine cable provider Gulf Bridge International, connected two days later at the Qatar Science and Technology Park. The competing 5G services offer rapid connectivity, with download speeds in excess of 1GBps, and ultra-low latency, meaning very short delays for data transmission.

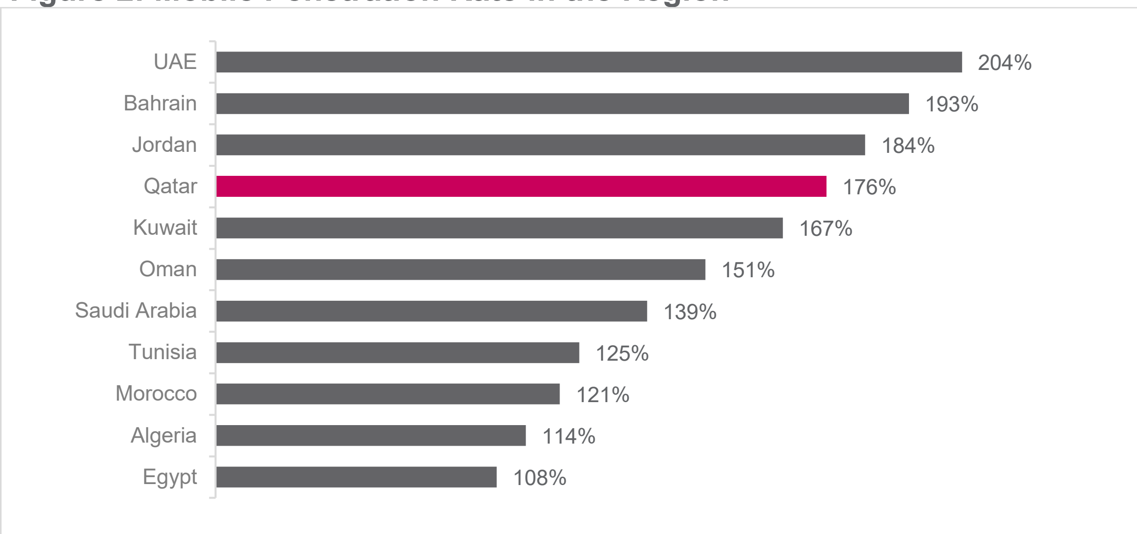
As per the latest International Telecom Union (ITU) statistics (**Figure 1**) reveals Qatar mobile subscriber base has been increasing consistently and is likely to stabilize in the coming years. Further, the mobile subscriber penetration is significantly above the 100% threshold and comparable to most of the GCC countries (**Figure 2**).

Figure 1: Qatar Mobile Services, Subscribers and Penetration Rate



Source: ITU data as published on ITU Website, https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx

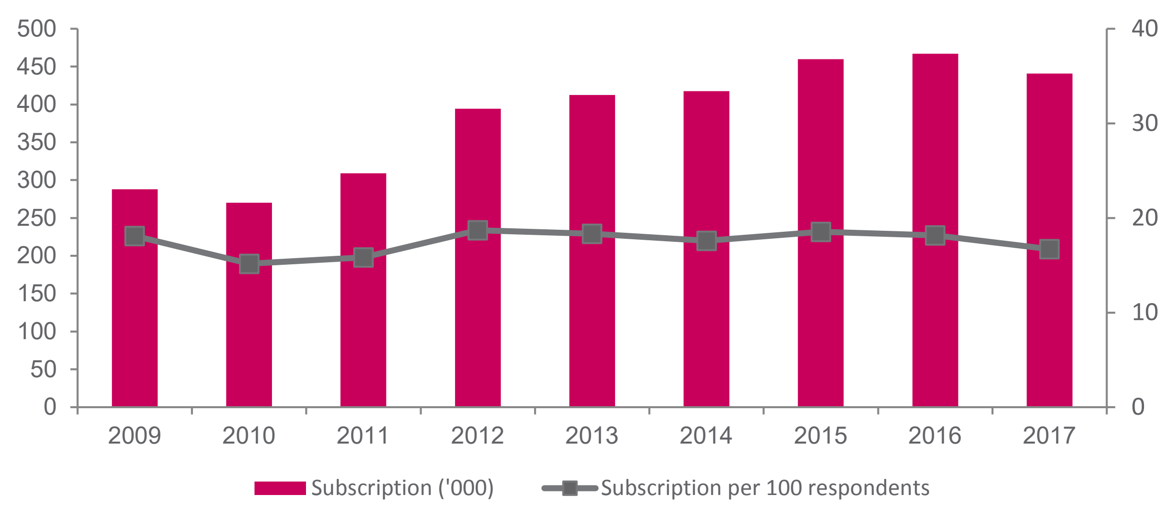
Figure 2: Mobile Penetration Rate in the Region



Source: Q1 2017, Arab Advisors, CRA calculation, CRA Annual Report Data

As revealed in **Figure 3**, the fixed line subscriptions among households in Qatar is also increasing consistently till 2016 but has seen a decline in 2017. However, the penetration rate has been on steady decline and could be due to change in the population structure of Qatar, coupled with the fact of the trend of increasing mobile preference.

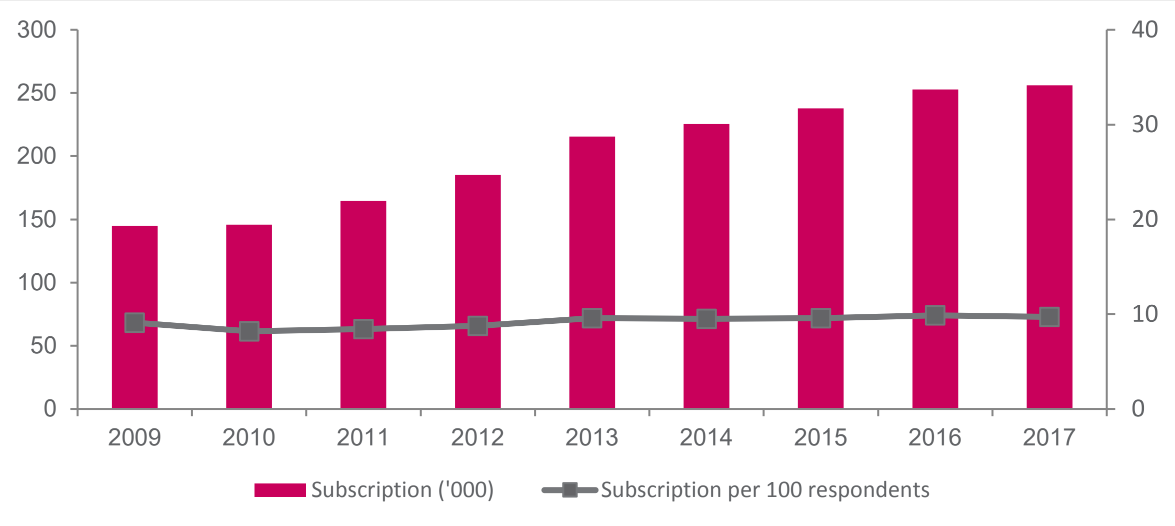
Figure 3: Qatar Fixed Phone Line, Subscribers and Penetration Rate



Source: ITU data as published on ITU Website, https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx

In terms of the Fixed Broadband, subscriptions numbers have consistently increased over time, but the penetration rate is stabilizing, (see **Figure 4**). The reason for stabilization could be the change in the population's makeup with an increasing number transient population in the market as compared to mainstream population, who are the main users of fixed broadband services.

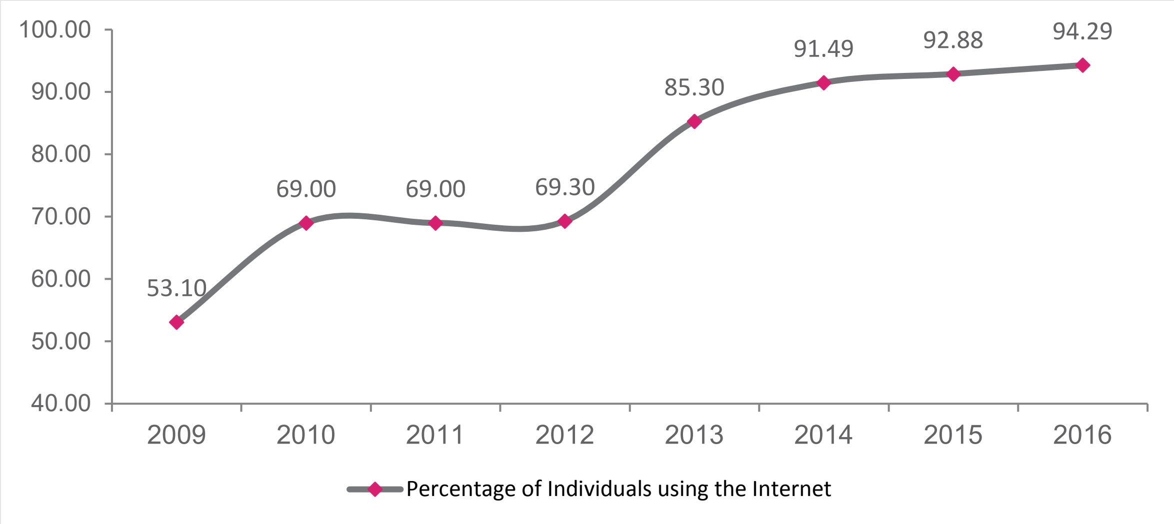
Figure 4: Qatar Fixed Broadband, Subscribers and Penetration Rate



Source: ITU data as published on ITU Website, https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx

Qatar is also characterized with high internet penetration rate at an individual level. As shown in **Figure 5**, the internet access has been steadily growing in Qatar and in 2017 almost 94% of individuals have access to internet through any device.

Figure 5: Qatar Individual Internet Access



Source: ITU data as published on ITU Website, https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx

Qatar Telecom Market Stakeholders

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

- Ooredoo, telecom service provider
- Vodafone, telecom service provider
- Communications Regulatory Authority (CRA)

Ooredoo, formerly Qatar Telecom (Qtel), 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 fixed line 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 started offering fixed services in a few areas of Qatar (Mainly Barwa City and the Pearl).

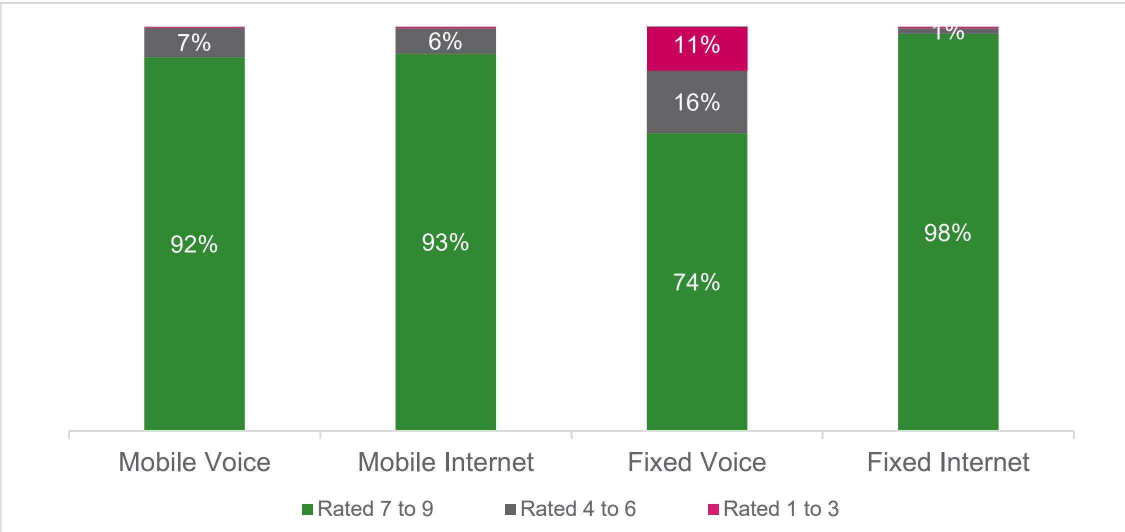
The Communications Regulatory Authority (CRA) is the Communications Regulator in the state of Qatar established by virtue of Emiri Decree (42) in 2014. The CRA regulates the Telecommunications and Information Technology sector, Postal sector and access to digital media. The CRA encourages and supports 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 at the heart of everything the CRA does.

4. CUSTOMERS' PERCEIVED QUALITY OF COMMUNICATION SERVICES IN THE STATE OF QATAR

4.1. Perception on Importance of Communication Services

As per the survey data, customers place a high degree of importance on all communications services. The research shows that mobile voice, mobile internet, fixed voice and fixed internet services are all highly important to this audience, with at least three quarters giving a score of seven or higher, on a scale 1 to 9 with 1 being not at all important and 9 is vital, for each area. Fixed internet, mobile internet and mobile voice are considered most important, being assigned a score of seven or higher by nine out of ten respondents (98%, 92% and 93% respectively). At an overall level, fixed voice services are considered relatively less important.

Figure 6: Importance of Communication Services – Customer Perception



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

The importance of mobile services (voice and internet) and fixed internet services is high across different nationality groups. The importance of fixed voice varies by nationality. While 74% assign importance (seven or higher) at an overall level, it is lower (62%) among Qatari nationals compared to the Non- Qatari population (**Table 1**).

Table 1: Perceived Importance of Communication Services, By Nationality

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**92**	**93**	**74**	**98**
Qatari	95	96	62	98
Non- Qatari	92	93	77	98

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)

Figure represent proportion (%) of customers rating 7 or above on importance scale of 1 to 9, where 1 means is not at all important and 9 means vital

The importance placed on communication services varies by type of population type. Among transient population relatively less respondents (87% for mobile voice and 88% for mobile internet) assign importance score of 7 and above as compared to the respondents from the mainstream population (94% for mobile voice and mobile internet) (See **Table 2**).

Table 2: Importance of Communication Services, By Type of Population

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**92**	**93**	**74**	**98**
Mainstream	94	94	74	98
Transient	87	88	-	-

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figure represent proportion (%) of customers rating 7 or above on importance scale of 1 to 9, where 1 means is not at all important and 9 means vital
Fixed Voice and Fixed Internet service was not part of the scope for transient population

The importance of different communication services is not significantly differentiated by gender, with slightly higher importance rate for females across all services types.

Table 3: Importance of Communication Services, By Gender

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**92**	**93**	**74**	**98**
Male	90	93	71	97
Female	96	94	75	99

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figure represent proportion (%) of customers rating 7 or above on importance scale of 1 to 9, where 1 means is not at all important and 9 means vital

The Fixed voice services are significantly much less important to the younger population (15 – 34 years old) compared to older population groups.

Table 4: Importance of Communication Services, By Age

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**92**	**93**	**74**	**98**
15- 24 years old	92	93	57	98
25- 34 years old	91	94	66	98
35 – 44 years old	93	94	85	99
45- 54 years old	91	90	81	99
55 and more	97	95	85	95

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)

Figure represent proportion (%) of customers rating 7 or above on importance scale of 1 to 9, where 1 means is not at all important and 9 means vital

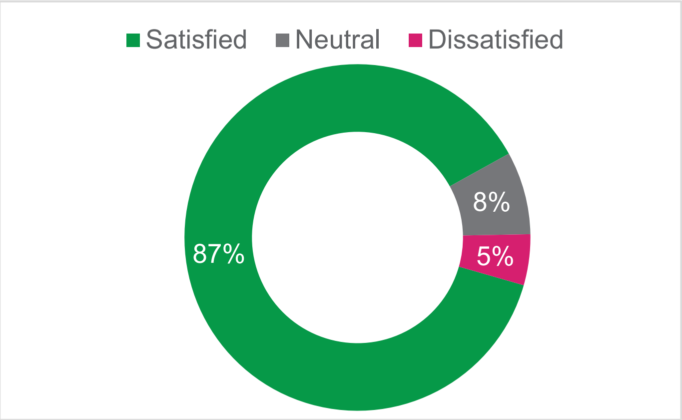
4.2. Quality of Service Perception

Given the mandate of CRA, it is important to understand customers' opinion and level of satisfaction with various touch-points (like purchase, installation, customers service, retail center, complaints handling, billing, payment, recharge etc.) they have with their service providers and with CRA.

One of the key objectives of the CRA mandate is to set quality of service standards and monitor compliance. The perceived overall quality of the service among customers is an important parameter to understand as part of the CRA mandate.

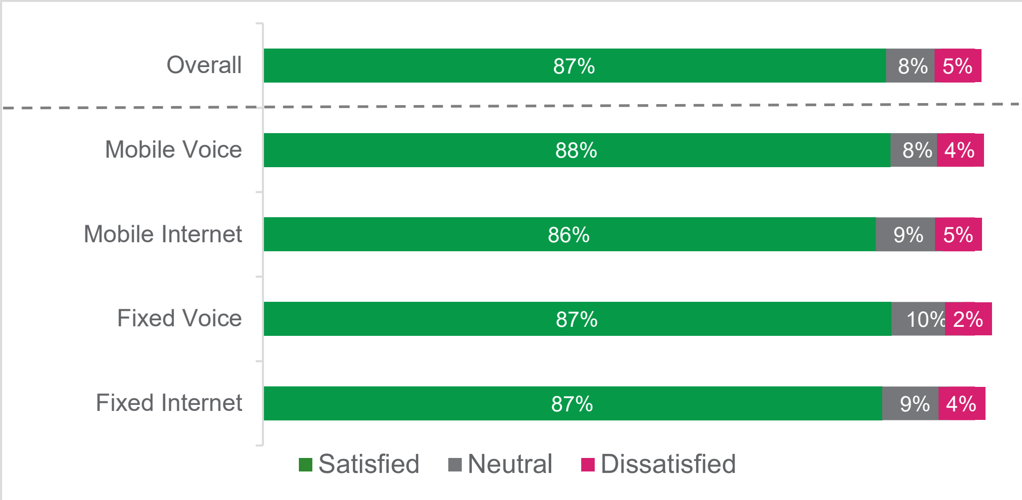
Overall, 87% of customers are satisfied with the Quality of Service (QoS) of telecommunication services (**Figure 7**). The satisfaction with QoS is similar across different communication services used among the customers (**Figure 8**).

Figure 7: Overall Quality of Service Perceptions



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362
Note: Numbers may not add up to 100 percent due to rounding off

Figure 8: Quality of Service Perceptions, Overall and By Type of Service



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

The perceived QoS for mobile voice among Qatar customers (88% customers satisfied) is very similar to Australia, but higher than Bahrain and UAE. However, for the fixed voice service, QoS perception is at par with UK, but better than UAE, Australia and Bahrain. For the fixed internet services, QoS perception among Qatar customers is higher than all benchmarking countries of Australia, Bahrain, UAE and UK.

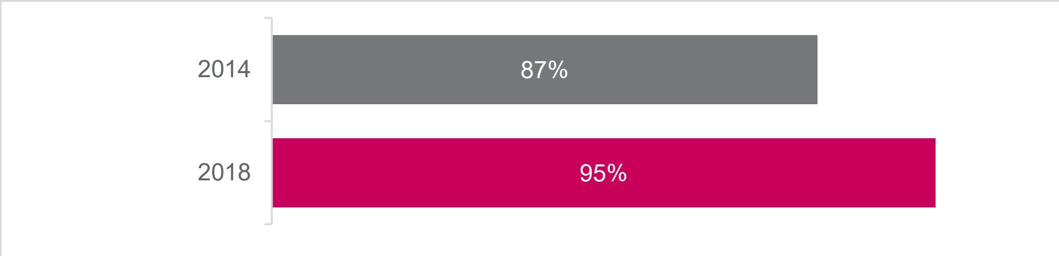
Table 5: Quality of Service Perception- Benchmarking

	Qatar	Australia	Bahrain	UAE	UK
Mobile Voice	88	88	78	83	91
Mobile Internet	86	-	-	-	-
Fixed Voice	87	80	82	78	87
Fixed Internet	87	74	71	83	80

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Australia benchmarks are for 2016 and 2017
Bahrain (2016) benchmarks are rating 7 to 10 on 1 to 10 scales
UAE benchmarks are for 2016 and average of two operators
UK Benchmarks are for 2018

The overall QoS perception has improved from 2014 to 2018 by almost 8%. Improvement of 6% to 8% is visible among Mobile Voice, Mobile Internet and Fixed Voice services, while Fixed Internet QoS perception has remained consistent.

Figure 9: Quality of Service Perception, 2014 vs. 2018



Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138); Customer Satisfaction Survey 2014
Note: For benchmarking purposes, Qatar 2018 figure include proportion of customers rating satisfied and neutral to maintain comparison reporting from 2014 to 2018

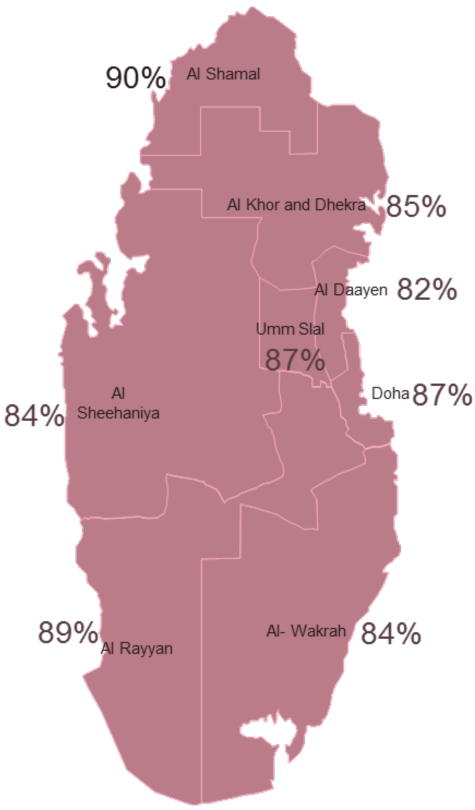
Table 6: Quality of Service Perception, 2014 vs. 2018, Overall and By Type of Service

	2018	2014
Overall	**95**	**87**
Mobile Voice	96	88
Mobile Internet	95	89
Fixed Voice	98	89
Fixed Internet	96	96

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
2014: Mobile Internet is Mobile Broadband and Fixed Internet is Fixed Broadband
Note: For benchmarking purposes, Qatar 2018 figure include proportion of customers rating satisfied and neutral to maintain comparison reporting from 2014 to 2018

An interesting observation from the results is the variation of the overall QoS perception by location. The customers in Al Daayen have lowest (82%) satisfaction with QoS perception, while customers in Al Shamal (90%) have highest QoS perception.

Figure 10: Quality of Service Perception, Overall by Municipality



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of satisfied consumers

The below table reveals that the QoS perception by services also is impacted by location. For mobile voice services, customers in Al Daayen at 78% satisfaction have significantly lower with QoS perception than overall at 88%. Similarly, for mobile internet services, customers in Al Daayen have lower satisfaction (74%) as compared to 88% at overall level. The satisfaction with QoS perception for fixed voice services shows significant variation with location. Customers in Al Daayen (60%), Al Shamal (76%) and Umm Slal (73%) have considerably lower satisfaction as compared to overall at 87%. In terms of the fixed internet services also, the satisfaction with QoS perception is significantly lower among Al Daayen customers (59%) as compared to overall satisfaction at 87%.

Table 7: Quality of Service Perception, By Type of Service and Location

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**88**	**86**	**87**	**87**
Al Daayen	78	74	60	59
Al Khor and Dhekra	87	89	93	85
Al Rayyan	90	89	90	88
Al Shamal	90	90	76	90
Al Sheehaniya	85	81	96	98
Al Wakrah	87	84	80	90
Doha	89	85	88	87
Umm Slal	84	85	73	80

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of satisfied consumers

The QoS perception varies with the type of population. For mobile voice services, QoS perception is significantly higher among mainstream population (88%) as compared to the transient population (78%). Similar trend is observed for mobile internet services also, with QoS perception satisfaction among mainstream population (88%) significantly higher than transient population (74%). The qualitative research revealed that customer expectations among the transient and mainstream customers is quite different, with price being a key driver among the transient customers and not a significant parameter. These different expectations can be potential reason for changes in QoS perceptions.

Table 8: Quality of Service Perception, By Type of Population

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**88**	**86**	**87**	**87**
Mainstream	90	88	87	87
Transient	78	74	-	-

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of satisfied consumers
Note: Perception about Fixed services is obtained only from Mainstream population

Minor variation is observed for QoS perception among different nationalities. On average, Qataris are 5 percentage points more satisfied with QoS perception than Non-Qatari across the four communication services.

Table 9: Quality of Service Perception, By Nationality

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**88**	**86**	**87**	**87**
Qatari	93	91	92	92
Non- Qatari	88	85	86	86

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of satisfied consumers

The QoS perception does not show significant variation across service providers. For mobile voice services, the satisfaction with QoS perception among Ooredoo customers is 89% and 86% among Vodafone customers. Similarly, the satisfaction with QoS perception for mobile internet (Ooredoo customers at 87% and Vodafone customers at 84%) is on the same lines. Despite limited geographical coverage for Vodafone fixed services, the satisfaction with QoS perception among Vodafone customers for fixed internet services (91%) is slightly higher than Ooredoo customers (87%).

Table 10: Quality of Service Perception, By Service Provider

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**88**	**86**	**87**	**87**
Ooredoo	89	87	88	87
Vodafone	86	84	87	91

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of satisfied consumers

In general, the satisfaction with QoS is significantly higher among postpaid customers (95% for both mobile voice and mobile internet) as compared to the prepaid customers (85% for mobile voice and 82% for mobile internet).

Table 11: Quality of Service Perception, By Type of Connection

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**88**	**86**	**87**	**87**
Prepaid	85	82	-	-
Postpaid	95	95	-	-

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of satisfied consumers

QoS perception varies among customers in Qatar across genders. The table below reveals that the satisfaction with QoS is slightly higher among females across all surveyed communication services.

Table 12: Quality of Service Perception, By Gender

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**88**	**86**	**87**	**87**
Male	87	85	83	85
Female	90	87	90	89

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of satisfied consumers

The Quality of Service perception shows gradual variation with age groups. The youngest population group surveyed (15- 24 years old) have significantly higher QoS satisfaction with mobile voice (94% customers satisfied), mobile internet services (90% customers satisfied) as compared to the all other age groups. Another interesting observation is that within the same age group, respondents have higher satisfaction on QoS for mobile services (voice and internet) as compared to their fixed alternatives.

Table 13: Quality of Service, By Age

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	88	86	87	87
15- 24 years old	94	90	92	87
25- 34 years old	86	85	86	84
35 – 44 years old	90	88	90	92
45- 54 years old	86	83	80	87
55 and more	83	80	89	84

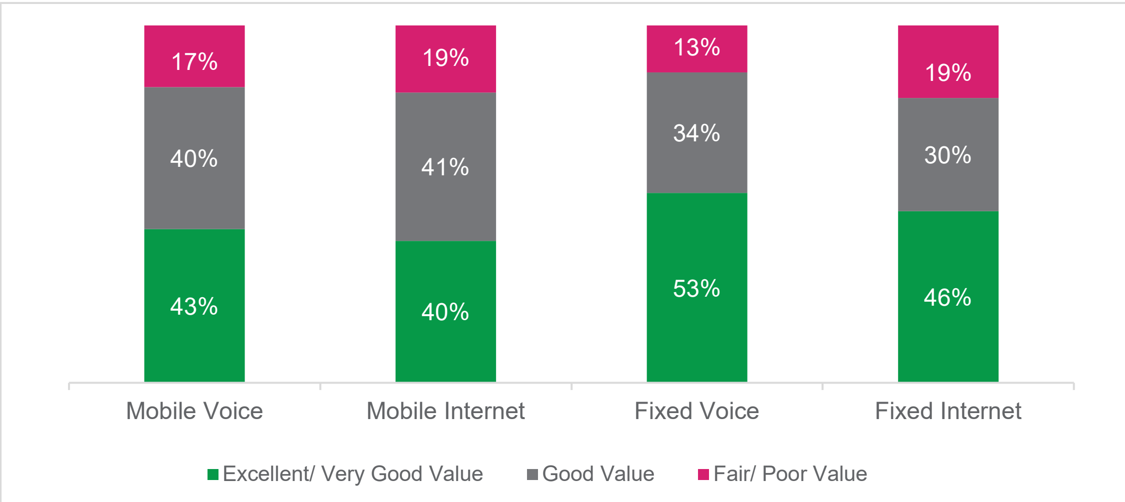
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of satisfied consumers

4.3. Value Perception

Another important parameter under consideration by CRA is the value perception perceived by customers of communication services.

The value perception is highest perception for fixed voice (53% rating excellent or very good value for money) and the lowest for mobile internet services (40%). Further there is significant percentage of customers who have low value perception across all four services. In particular, 19% of the customer perceive to have low or poor value for mobile internet and fixed internet services.

Figure 11: Value Perception, By Type of Service



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

The survey results show that the value perception is relatively higher among the mainstream population as compared to the transient population for both the mobile voice and mobile internet services (**Table 14**). This is very much in line with the expectations that transient population with their limited means may expect relatively higher value for the consumed services.

Table 14: Value Perception, By Type of population

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**43**	**40**	**53**	**46**
Mainstream	44	40	53	46
Transient	37	35	-	-

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating very good or excellent value

Across service providers, the value perception is slightly higher among Ooredoo customers as compared to Vodafone customers and this difference is more pronounced for the voice services (see **Table 15**).

Table 15: Value Perception, By Service Provider

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**43**	**40**	**53**	**46**
Ooredoo	46	40	54	46
Vodafone	38	39	39	47

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating very good or excellent value

The value perceptions vary further across nationality and gender. The value perception tends to be higher among Qataris as compared to Non-Qataris for mobile voice, mobile internet and fixed voice services. However, for fixed internet services, rates are reversed - higher value perception among Non-Qataris. Across genders, value perception is lower for males compared to females for all categories expect fixed internet. (**Table 17**).

Table 16: Value Perception, By Nationality

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**43**	**40**	**53**	**46**
Qatari	50	48	64	39
Non-Qatari	42	39	50	47

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating very good or excellent value

Table 17: Value Perception, By Gender

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**43**	**40**	**53**	**46**
Male	38	34	45	46
Female	50	47	58	45

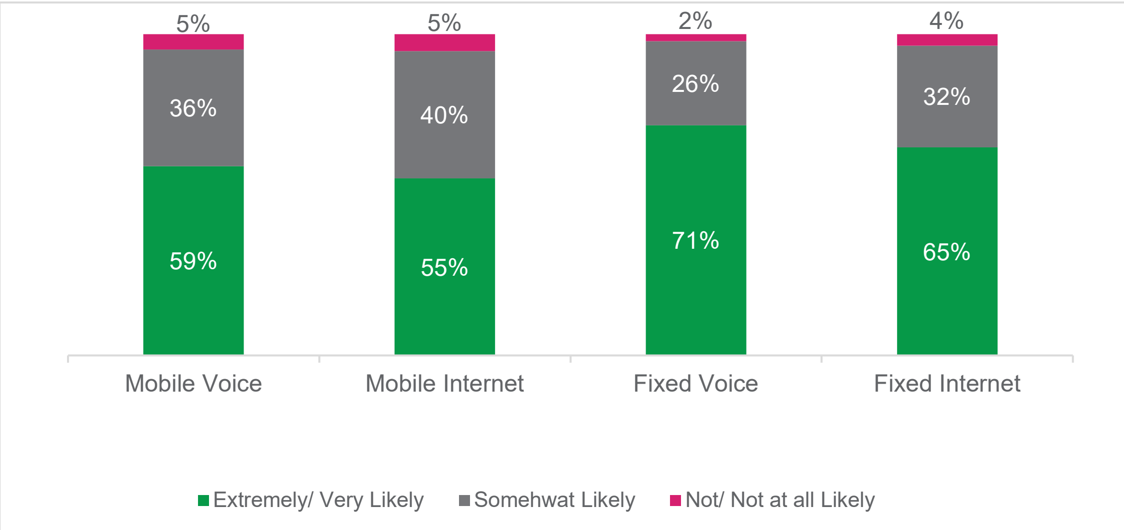
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating very good or excellent value

4.4. Intention to Recommend

The intention to recommend is another proxy parameter to measure customer experience with various communication services. This would provide CRA an indication if the satisfaction with services is translating to behavior changes in terms of intention to recommend among the customers.

Overall, more than half of customers would extremely or very likely recommend the services they use. The recommendation is highest for the fixed voice services (65% recommending) and lowest for the mobile internet services (55% recommending). The research reveals that there is less than 5% are not recommending (rating not likely or not at likely) across all the services.

Figure 12: Intention to Recommend, By Type of Service



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

Slightly above half of respondents from both mainstream and transient population would recommend both mobile voice and mobile internet services.

Table 18: Intention to Recommend, By Type of Population

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**59**	**55**	**71**	**65**
Mainstream	59	55	71	65
Transient	59	54	-	-

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating Extremely/ Very Likely

Further, the intention to recommend is noticeably lower among the Vodafone customers as compared to Ooredoo customers. This is much more pronounced for voices services - mobile (52% have intention to recommend Vodafone as compared to 64% for

Ooredoo), fixed voice (41% for Vodafone as compared to 73% for Ooredoo), as well as for the fixed internet (48% would recommend Vodafone as compared to 66% for Ooredoo). The limited geographical availability of fixed services from Vodafone may be one of the reasons for the lower Vodafone rates for fixed services.

Table 19: Intention to Recommend - By Service Provider

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**59**	**55**	**71**	**65**
Ooredoo	64	57	73	66
Vodafone	52	52	41	48

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating Extremely/ Very Likely

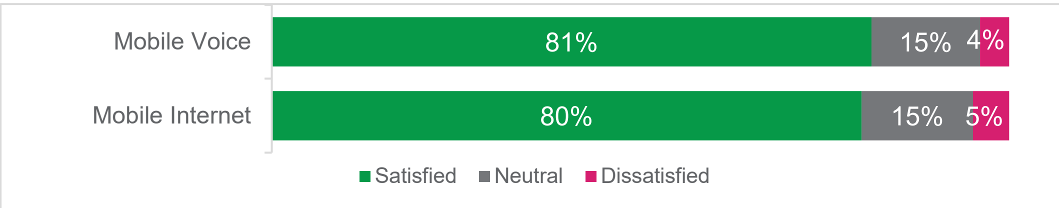
4.5. Customer Experience with Communication Network

Another key element of the study was to measure customer experience on network related parameters such as coverage, availability, reliability, voice quality and data services. The observations in the following sections are drawn at an overall level, as well as a segment level, wherever relevant deviations for the overall average rate was observed.

Network Coverage

The majority of the customers (4 out 5 people) are satisfied with network coverage (81% of customers of mobile voice and 80% of the customers of mobile internet) (**Figure 13**). Further, the variation in satisfaction with network coverage from 2014 to 2018 is 4% or less with satisfaction on mobile internet reducing by 4%, while the reduction is 1% in mobile voice services (**Table 20**).

Figure 13: Satisfaction with Mobile Network Coverage, By Type of Service



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176)
Note: Numbers may not add up to 100 percent due to rounding off

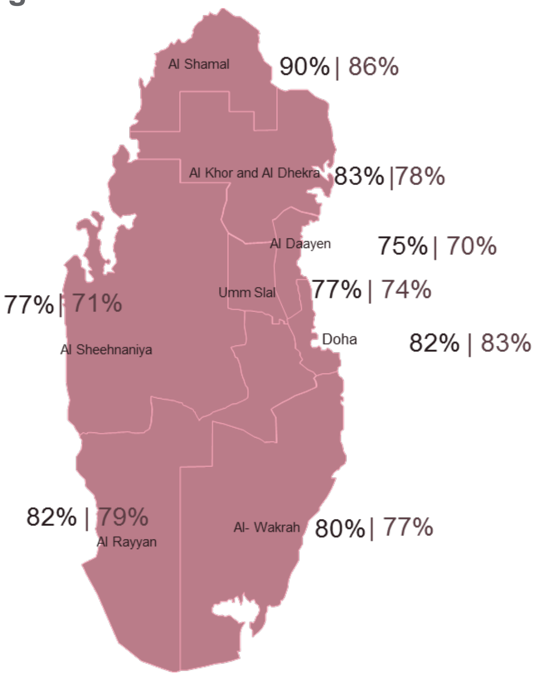
Table 20: Satisfaction with Network coverage, By Type of Service, 2014-2018

	2018	2014
Mobile Voice	96	97
Mobile Internet	95	99

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
2014: Mobile Internet is Mobile Broadband
Note: For benchmarking purposes, Qatar 2018 figure include proportion of customers rating satisfied and neutral to maintain comparison reporting from 2014 to 2018

The satisfaction with network coverage varies with geography; customers located in Al Daayen, Al Sheehaniya and Umm Slal have lower satisfaction as compared to other municipalities. While this is clearly observed for mobile voice services, it is similar for the mobile internet services also. In addition, the customers in Al Khor & Dhekra, Al Wakrah and Al Rayyan have the lowest satisfaction with mobile internet coverage among municipalities.

Figure 14: Satisfaction with Mobile Network Coverage: By Location



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176)
Figures above represent proportion (%) of customers satisfied
Figures in Red is for Mobile Voice and figures in Blue is for Mobile Internet

Across service providers, clearly customers of Ooredoo have higher satisfaction compared to Vodafone ones. This is observed among both mobile voice and mobile internet services. On further exploring the subject, Vodafone customers had referred to major network outage in July 2017, resulting in service disruption and may have been reflected in the lower satisfaction rates.

Table 21: Satisfaction with Network Coverage: By Service Provider

	Mobile Voice	Mobile Internet
Overall	81	80
Ooredoo	86	85
Vodafone	74	71

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176)
Figures above represent proportion (%) of customers satisfied

Across nationalities, satisfaction with network coverage is slightly lower among Non-Qatari respondents for both the mobile voice and mobile internet services. The gap is wider for mobile voice, where the satisfaction among Non-Qataris at 81% is 5 percentage points lower compared to Qataris. The difference in satisfaction for mobile internet among Qatari and Non- Qatari is only 3%.

Table 22: Satisfaction with Mobile Network Coverage: By Nationality

	Mobile Voice	Mobile Internet
Overall	**81**	**80**
Qatari	86	82
Non- Qatari	81	79

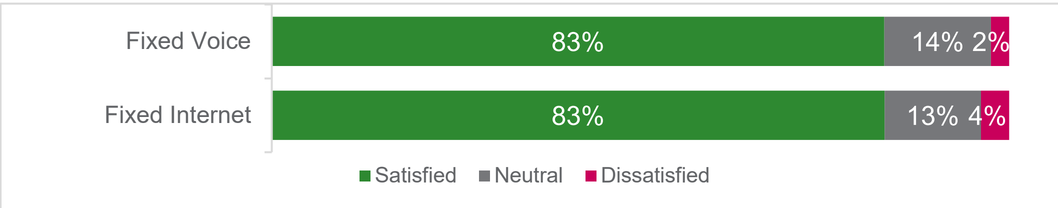
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176)
Figures above represent proportion (%) of customers satisfied

Other important network-related parameters are fixed service (voice and internet) availability and mobile services (voice and internet) reliability.

Service Availability

4 out of 5 people are satisfied with the geographic availability of both fixed voice and fixed internet services.

Figure 15: Satisfaction with Fixed Services Geographic Availability



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

Satisfaction further varies with location. The rate is lowest in Al Daayen for both fixed voice and fixed internet services and highest among customers in Al Sheehaniya.

Table 23: Satisfaction with Fixed Services Geographic Availability: By Location

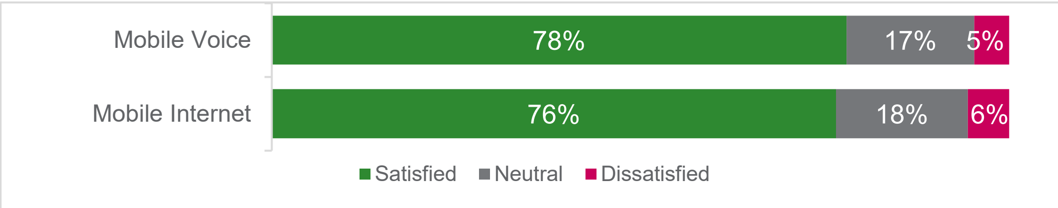
	Fixed Voice	Fixed Internet
Overall	83	83
Al Daayen	58	61
Al Khor and Dhekra	88	87
Al Rayyan	81	81
Al Shamal	86	88
Al Sheehaniya	95	92
Al Wakrah	80	81
Doha	86	86
Umm Slal	80	78

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176)
Figures above represent proportion (%) of customers satisfied

Service Reliability

Satisfaction with service reliability was surveyed among customers of mobile voice and mobile internet services. Customers are in general satisfied with service reliability for both mobile voice and mobile internet services (**Figure 16**), with rates a bit lower than the fixed service availability. The dissatisfaction with reliability of connection is only 5% and 6% respectively for mobile voice and mobile internet customers.

Figure 16: Satisfaction with Mobile Services Reliability



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176)
Note: Numbers may not add up to 100 percent due to rounding off

Like other quality parameters presented earlier, satisfaction with mobile service reliability varies with location. For mobile voice, the satisfaction rate is lowest among customers in Umm Slal (72% satisfied), while it is highest among customers in Al Rayyan (80%). Similarly, for mobile internet, customers in Umm Slal have lowest satisfaction (68% satisfied) while is it highest among customers of Al Shamal, Al Rayyan, Al Khor & Dhekra and Doha (**Table 24**).

Table 24: Satisfaction with Mobile Services Reliability, By Location

	Mobile Voice	Mobile Internet
Overall	**78**	**76**
Al Daayen	77	70
Al Khor and Dhekra	78	78
Al Rayyan	80	78
Al Shamal	74	79
Al Sheehaniya	74	73
Al Wakrah	74	75
Doha	78	77
Umm Slal	72	68

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176)
Figures above represent proportion (%) of customers satisfied

The service reliability varies with the service provider - Ooredoo customers have higher satisfaction compared to Vodafone ones for both Mobile Voice and Mobile Internet services (**Table 25**), with respectively 13 percentage points gap for mobile voice and 10 percentage points difference for mobile internet services.

Table 25: Satisfaction with Mobile Services Reliability, By Service Provider

	Mobile Voice	Mobile Internet
Overall	**78**	**76**
Ooredoo	83	80
Vodafone	70	70

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176)
Figures above represent proportion (%) of customers satisfied

In addition, the mobile service reliability perception is also impacted by the type of connection, with postpaid customers having higher satisfaction on both mobile voice and mobile internet services reliability compared to the prepaid customers (**Table 26**).

Table 26: Satisfaction with Reliability of Connection, By Type of Connection

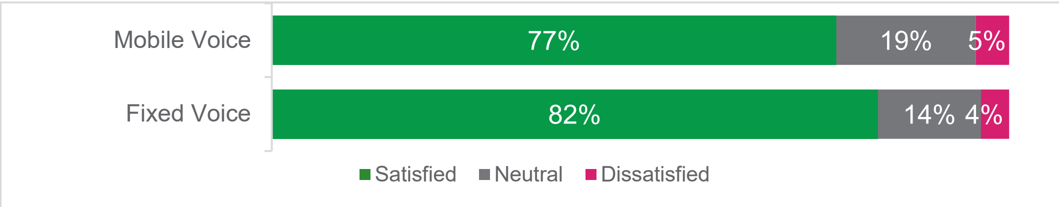
	Mobile Voice	Mobile Internet
Overall	**78**	**76**
Prepaid	75	76
Postpaid	85	83

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176)
Figures above represent proportion (%) of customers satisfied

Voice Quality and Clarity

More than 75% of the customers are satisfied with voice quality and clarity for both mobile voice and fixed voice services, and only less than 5% of them expressed dissatisfaction.

Figure 17: Satisfaction with Voice Quality and Clarity



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Fixed Voice: 992)
Note: Numbers may not add up to 100 percent due to rounding off

In 2018, the satisfaction rate has remained unchanged compared to 2014 for both services (**Table 27**).

Table 27: Satisfaction with Voice Quality and Clarity, 2014 vs. 2018

	2018	2014
Mobile Voice	95	95
Fixed Voice	96	97

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: For benchmarking purposes, Qatar 2018 figure include proportion of customers rating satisfied and neutral to maintain comparison reporting from 2014 to 2018

In terms of benchmarking, satisfaction with voice clarity and quality is higher among Qatar customers as compared to Australian customers for mobile voice. Similarly, the satisfaction with voice quality and clarity is higher among customers of Qatar as compared to UK for the fixed voice service.

Table 28: Satisfaction with Voice Quality and Clarity, Benchmarking

	Qatar	Australia	UK
Mobile Voice	95	89	-
Fixed Voice	96	-	89

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Fixed Voice: 993)
Note: For benchmarking purposes, Qatar 2018 figure include proportion of customers rating satisfied and neutral to maintain comparison reporting from 2014 to 2018
Australia benchmarks are for 2016 and 2017
UK Benchmarks are for 2018

The table below suggest that there is considerable satisfaction variation across locations, when it comes to fixed voice services. Customers in Al Daayen have significantly lower satisfaction (56%) compared to the overall average satisfaction rate of 82%. Overall, satisfaction with mobile voice quality and clarity is lower compared to the fixed one and across locations highest in Al Rayyan (79%) and lowest in Umm Slal (72%).

Table 29: Satisfaction with Voice Quality and Clarity, By Location

	Mobile Voice	Fixed Voice
Overall	**77**	**82**
Al Daayen	74	56
Al Khor and Dhekra	76	89
Al Rayyan	79	80
Al Shamal	75	88
Al Sheehaniya	77	89
Al Wakrah	73	78
Doha	76	85
Umm Slal	72	79

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Fixed Voice: 992)
Figures above represent proportion (%) of customers satisfied

Similar to the network coverage and network reliability, satisfaction rates on voice quality and clarity are higher among Ooredoo customers compared to Vodafone customers for both the mobile and fixed voice. A difference of 12% points for mobile voice and 10% points for fixed voice service is observed.

Table 30: Satisfaction with Voice Quality and Clarity, By Service Provider

	Mobile Voice	Fixed Voice
Overall	**77**	**82**
Ooredoo	81	82
Vodafone	69	72

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Fixed Voice: 992)
Figures above represent proportion (%) of customers satisfied

In addition, satisfaction rate with voice quality and clarity for mobiles services is significantly higher among postpaid customers as compared to prepaid customers (see **Table 31**).

Table 31: Satisfaction with Mobile Voice Quality and Clarity, By Type of Connection

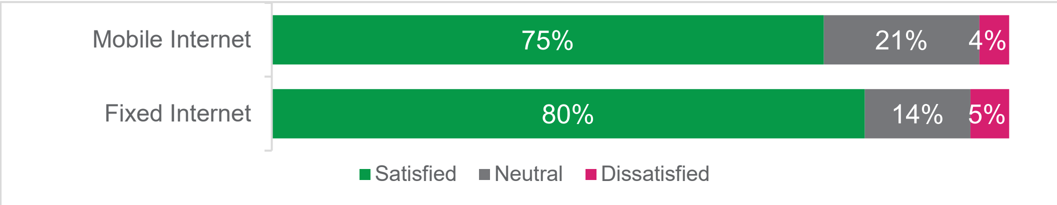
	Mobile Voice
Overall	**77**
Prepaid	73
Postpaid	85

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Fixed Voice:992)
Figures above represent proportion (%) of customers satisfied

Speed of Data Services

Based on survey response, customers are mostly satisfied with speed of data services for both mobile and fixed services, with less than 5% of customers dissatisfied for both services. Relatively higher satisfaction is observed for Fixed Internet (80%) compared to Mobile Internet (75%).

Figure 18: Satisfaction with Speed of Data Services



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Internet: 2172; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

The same indicator has remained unchanged for both mobile internet and fixed internet services compared to 2014 (See **Table 32**).

Table 32: Satisfaction with Speed of Data Services, 2014 to 2018

	2018	2014
Mobile Internet	96	96
Fixed Internet	95	95

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: For benchmarking purposes, Qatar 2018 figure include proportion of customers rating satisfied and neutral to maintain comparison reporting from 2014 to 2018

When compared to relevant peers, satisfaction on speed of data services is significantly higher among Qatar customers for both mobile internet and fixed internet services.

Table 33: Satisfaction with Speed of Data Services, Benchmarking

	Qatar	Australia	Bahrain
Mobile Internet	96	80	-
Fixed Internet	95	58	67

Figures above represent proportion (%) of satisfied consumers

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: For benchmarking purposes, Qatar 2018 figure include proportion of customers rating satisfied and neutral to maintain comparison reporting from 2014 to 2018
Australia benchmarks are for 2016 and 2017
Bahrain (2016) benchmarks are rating 7 to 10 on 1 to 10 scales

There is variation observed in speed satisfaction rates across locations for both mobile and fixed internet services. While variation for mobile Internet is 9% points (Al Khor & Dhekra lowest at 69% and Al Shamal highest at 78%), there is 20% points variation for the fixed internet service (Al Daayeen lowest at 69% and Al Sheehaniya highest at 89%).

Table 34: Satisfaction with Speed of Data Services, By Location

	Mobile Internet	Fixed Internet
Overall	**75**	**80**
Al Daayen	72	69
Al Khor and Dhekra	69	76
Al Rayyan	75	78
Al Shamal	78	78
Al Sheehaniya	75	89
Al Wakrah	72	82
Doha	76	83
Umm Slal	74	80

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Internet: 2172; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied

When further comparing services providers, satisfaction with speed of mobile data services is higher among Ooredoo customers (77%) as compared to Vodafone customers (71%). In contrast, fixed internet speed is rated by Vodafone customers at 83% vs. 80% rate by Ooredoo customers.

Table 35: Satisfaction with Speed of Data Services, By Service Provider

	Mobile Internet	Fixed Internet
Overall	**75**	**80**
Ooredoo	77	80
Vodafone	71	83

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Internet: 2172; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied

In terms of age breakdown, satisfaction with speed of mobile data services shows 5 percentage points variation among different age groups. However, variation is higher for the fixed internet services across age groups. Mostly satisfied (with 85%) are the 25 – 44 year old ones, while rest of the age groups are in the 74-75% range.

Interestingly, within the 25 – 44-year age bracket, the satisfaction is significantly higher for fixed internet (85-86%) compared to mobile internet (73-75%).

Table 36: Satisfaction with Speed of Data Services, By Age

	Mobile Internet	Fixed Internet

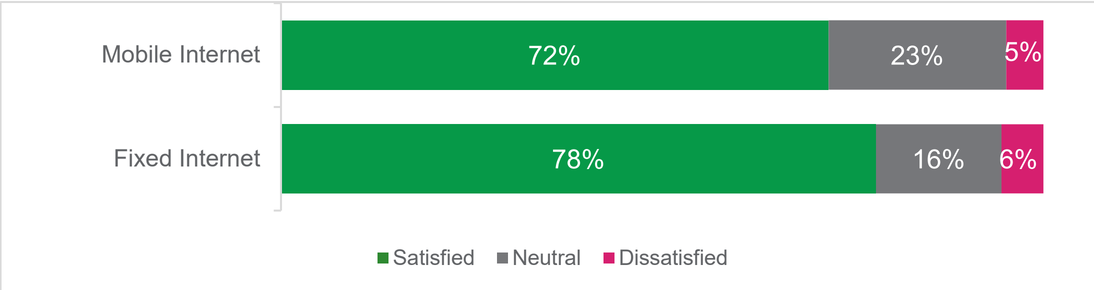
Overall	**75**	**80**
15- 24 years old	76	75
25- 34 years old	73	85
35 – 44 years old	75	86
45- 54 years old	77	75
55 and more	72	74

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2172; Fixed Voice:1138)
Figures above represent proportion (%) of customers satisfied

Video Access or Streaming Quality

Customer satisfaction with video access or streaming quality is high for both mobile and fixed internet services. Relatively, customers of fixed internet services have higher satisfaction (78% satisfied) as compared to mobile internet customers (72% satisfied).

Figure 19: Satisfaction with Video Access or Streaming Quality



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Internet: 2172; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

There is minimal variation of the overall satisfaction rates for video and streaming quality from 2014 to 2018, with slightly lower rates for 2018 for both mobile and fixed internet.

Table 37: Satisfaction with Video Access or Streaming Quality; 2014 to 2018

	2018	2014
Mobile Internet	95	97
Fixed Internet	94	96

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Percentage reporting for 2018 is those rating satisfied and neutral for similar comparison to 2014

Level of satisfaction varies with location for fixed internet, the satisfaction is lowest among customers in Al Daayen (61% satisfied) and the highest among customers in Al Sheehaniya (89% satisfied)

Table 38: Satisfaction with Video Access or Streaming Quality, By Location

	Mobile Internet	Fixed Internet
Overall	**72**	**78**
Al Daayen	69	61
Al Khor and Dhekra	75	81
Al Rayyan	74	72
Al Shamal	73	84
Al Sheehaniya	66	89
Al Wakrah	67	79
Doha	71	84
Umm Slal	73	77

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Internet: 2172; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied

The satisfaction with video access or streaming quality is observed to be lower among Vodafone customers for mobile internet services (67% as compared to 74% for Ooredoo).

Table 39: Satisfaction with Video Access or Streaming Quality: By Service Provider

	Mobile Internet	Fixed Internet
Overall	**72**	**78**
Ooredoo	74	78
Vodafone	67	76

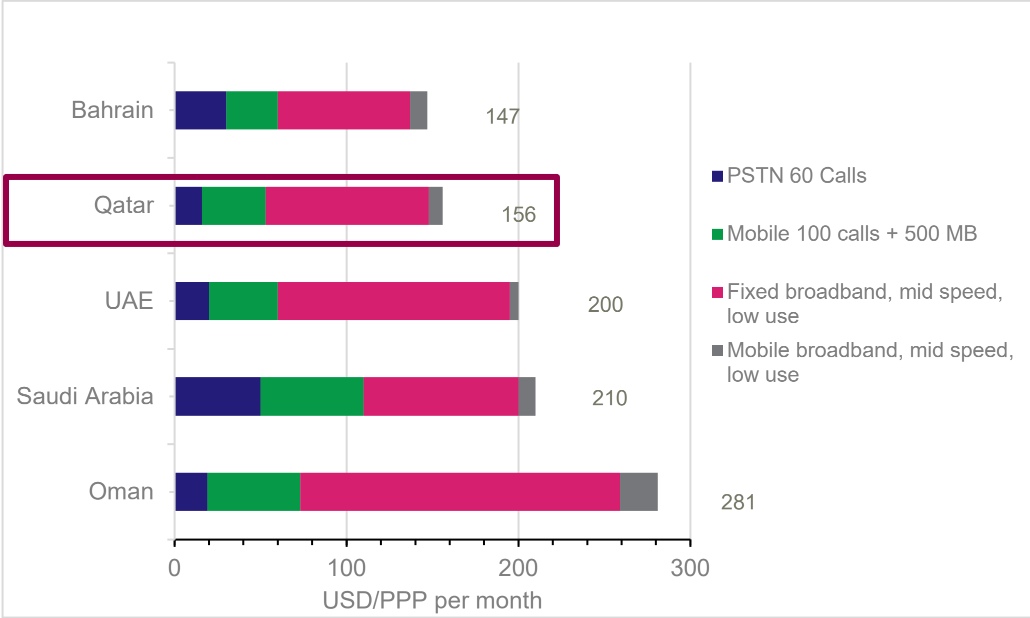
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Internet: 2172; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied

4.6. Customers' Perceptions on Pricing

According to the CRA mandate, customers should have access to communication services at affordable prices. Thus, CRA deems it important to understand the customers' perception on the pricing of communication services in Qatar and take necessary steps to ensure customers have access to affordable and impeccable communication services.

As part of a study conducted by the CRA - Qatar Telecom Pricing 2016. Benchmarking for medium residential usage of communication services shows Qatar competitive among GCC countries. The below figure compares a medium residential aggregate bracket across different countries in the region and Qatar is very competitively priced.

Figure 20: Qatar Residential Prices Benchmarking

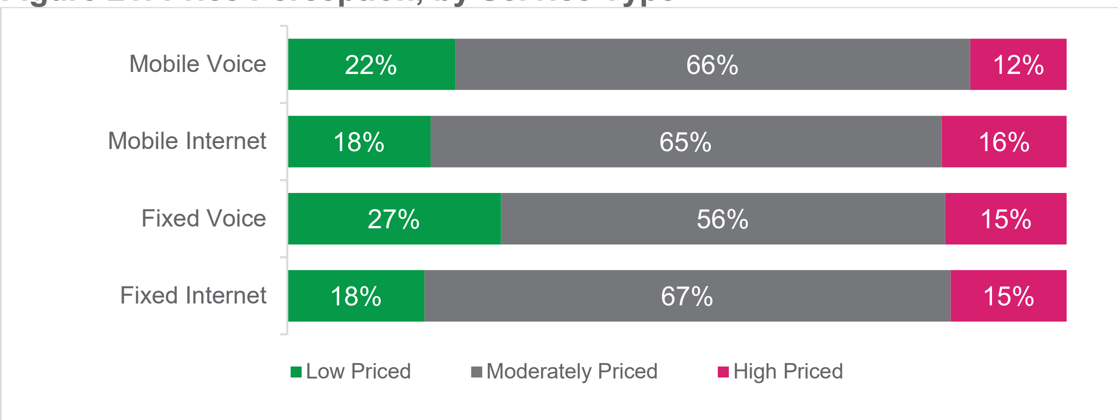


Source: International Retail Price Benchmarking Report 2016, published by CRA[8]

Keeping this in perspective, the survey also studied at customers' perception on pricing of communication services in Qatar.

Overall, majority of customers in Qatar have a moderate perception on prices of surveyed communication services. (see **Figure 21**). However, a range of 12% - 16% of the customers across services categories perceive the prices of communication services in Qatar to be high. The price perception is relatively better for fixed voice services.

Figure 21: Price Perception, by Service Type



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

Comparison over time shows that the price perception has improved for fixed voice services, while there was small decline for the fixed internet services. Interestingly, the qualitative research revealed that customers are of the opinion that the both the service

8 http://www.cra.gov.qa/en/document/international-retail-price-benchmarking-report

providers are encouraging and actively offering customers to upgrade to higher offer, effectively increasing the prices for fixed services.

Table 40:Perception on Pricing, 2014 to 2018

	2018	2014
Mobile Voice	88	88
Mobile Internet	86	88
Fixed Voice	85	76
Fixed Internet	85	96

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Percentage reporting for 2018 is Low price and moderately priced for similar comparison

The satisfaction with prices varies significantly with nationality and is higher among Qatari nationals as compared to Non-Qatari residents. This gap is highest for fixed voice services (96% for Qataris vs. 80% for Non-Qataris) and the lowest for mobile voice services (95% for Qatari vs. 87% for Non-Qatari).

Table 41: Customer Price Perception, By Nationality

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**88**	**84**	**83**	**85**
Qatari	95	92	96	93
Non-Qatari	87	83	80	83

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

The satisfaction with prices is higher among younger population (15-24 year old) as compared to 25- 44 year old population for mobile voice, fixed voice and fixed internet services. Another interesting observation is that among the younger population (15-24 year old), the satisfaction with the prices is relatively higher for voice services (mobile and fixed) as compared to internet services (mobile and fixed).

Table 42: Customer Price Perception, By Age Groups

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**88**	**84**	**83**	**85**
15- 24 years old	91	84	92	87
25- 34 years old	88	85	85	80
35 – 44 years old	90	87	79	85
45- 54 years old	83	81	85	90
55 and more	82	77	73	88

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)

Figures above represent proportion (%) of customers rating moderate/low/ very low priced

The satisfaction with prices varies also significantly by service provider. Overall, satisfaction with price rates are higher for Vodafone, but the degree of difference varies by the service.

Table 43: Customer Price Perception, By Service Provider

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**88**	**84**	**83**	**85**
Ooredoo	84	80	83	84
Vodafone	93	92	88	100

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

Surprisingly, satisfaction with prices is significantly higher among postpaid customers for both mobile voice (96% for postpaid vs. 84% for prepaid) and mobile internet services (90% for postpaid vs. 81% for prepaid). This could be due to the fact that postpaid customers find value in the prices with the additional services and value adds provided for postpaid connections.

Table 44: Customer Price Perception, By Type of Connection

	Mobile Voice	Mobile Internet
Overall	**88**	**84**
Prepaid	84	81
Postpaid	96	90

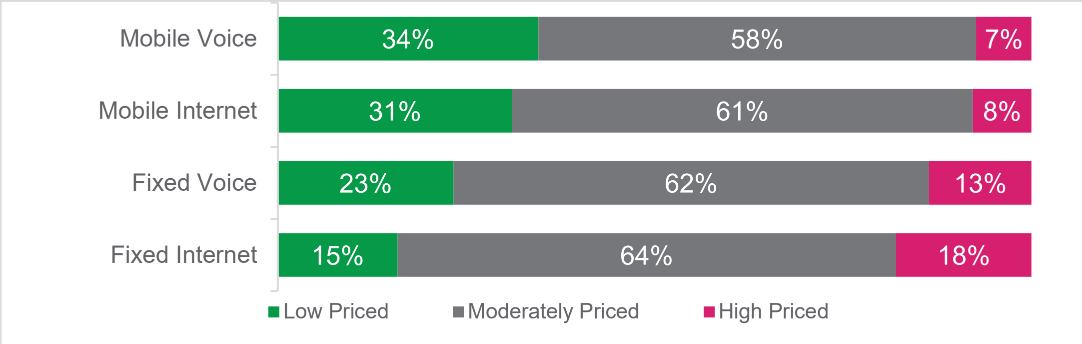
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

Perception on Initial Purchase and Installation Cost[9]

Overall, the initial purchase and installation cost are perceived as moderate by the customers in Qatar. Majority of the customers perceive the initial purchase and installation to be moderate (58% for mobile voice, 61% for mobile internet, 62% for fixed voice and 64% for fixed internet). However, compared to mobile services, there is considerable proportion of customers dissatisfied with the initial purchase and installation cost for fixed services -13% for fixed voice and 18% for fixed internet perceive the initial purchase and installation purchase to be high.

[9] For mobile services (voice and data) it is initial purchase cost only, while for fixed services (voice and internet) it includes both purchase and installation cost if applicable

Figure 22: Purchase and Installation Price Perception



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

The results suggest that satisfaction with purchase and installation price is better among Qataris as compared to Non-Qataris, across all services. The difference is particularly high for fixed internet services (91% among Qataris vs. 77% among Non-Qataris).

Table 45: Purchase and Installation Price Perception, By Nationality

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**93**	**92**	**87**	**82**
Qatari	99	99	95	91
Non- Qatari	91	91	82	77

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

Additionally, results suggest that the satisfaction with price of purchase and installation is much better among Vodafone customers across different services. While the difference in the mobile services between Vodafone and Ooredoo is about 8 percentage points, it is significantly higher at 12 percentage points for fixed voice and 14 percentage points for fixed internet services in favor of Vodafone. One must keep in mind that Vodafone fixed services are at present available only in limited locations.

Table 46: Purchase and Installation Price Perception, By Service Provider

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**93**	**92**	**87**	**82**
Ooredoo	89	89	84	79
Vodafone	97	97	96	93

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

The table below suggests that, the satisfaction with purchase and installation price is better among postpaid mobile customers as compared to prepaid customers.

Table 47: Purchase Price Perception, By Type of Connection

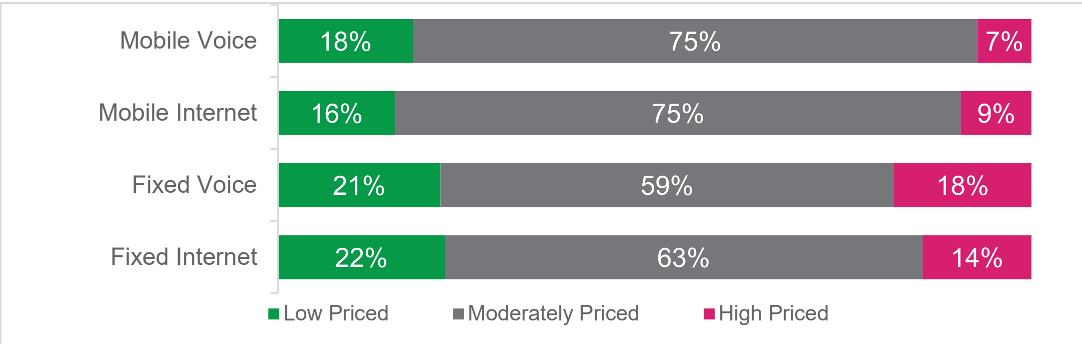
	Mobile Voice	Mobile Internet
Overall	**93**	**92**
Prepaid	91	90
Postpaid	96	97

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

Perception on Monthly Rental

Across services, majority of the customers perceive the monthly rental prices to be moderate or low. However, a substantial percentage of the customers of fixed voice (18%) and fixed internet (14%) perceive monthly rental charges to be high. The monthly rental perceived least pricy as per the survey is for mobile voice, followed by the one for mobile Internet.

Figure 23: Monthly Rental Perception



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Postpaid Mobile Voice: 733; Postpaid Mobile Internet: 819; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

The perception on monthly rental shows different variation from 2014 to 2018 across services. While the perception on mobile voice has seen a small decline of 2 percentage points, fixed voice monthly rental perception has remained steady and there was an increase of 3 percentage points for fixed internet services.

Table 48: Perception on Monthly Rental, 2014-2018

	2018	2014
Mobile Voice	93	95
Mobile Internet	91	-
Fixed Voice	82	82
Fixed Internet	86	83

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Percentage reporting for 2018 is Top3 for similar comparison

The monthly rental is perceived lower by Vodafone customers across all surveyed services. The difference is in the range of 8-15 percentage points across services and highest for fixed voice (Vodafone at 96% vs. Ooredoo at 79%).

Table 49: Perception on Monthly Rental, By Service Provider

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**93**	**91**	**82**	**86**
Ooredoo	89	87	79	85
Vodafone	97	97	96	95

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Postpaid Mobile Voice: 733; Postpaid Mobile Internet: 819; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

In terms of nationality, the satisfaction on monthly rental is higher for Qatari across all the services. The difference in is most pronounced for fixed voice (95% for Qatari vs. 73% for Non- Qatari), followed by fixed internet services (96% for Qatari and 82% for Non- Qatari).

Table 50: Perception on Monthly Rental, By Nationality

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**93**	**91**	**82**	**86**
Qatari	94	94	95	96
Non- Qatari	92	89	73	82

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Postpaid Mobile Voice: 733; Postpaid Mobile Internet: 819; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

Perception on Mobile Local Call Charges

The local call charges perception is moderate among mobile voice customers with 59% of respondents rating the prices as moderate. 30% of the customers perceive the monthly local call charges to be low priced.

Figure 24: Mobile Local Call Charges Perception

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Fixed Voice: 993)
Note: Numbers may not add up to 100 percent due to rounding off

Across nationalities, perception for mobile local charges is better among Qataris (96%) as compared to Non-Qatari (88%). The difference in the average disposable income level of Qatari and Non-Qatari could be contributing to this perception.

Table 51: Perception on Mobile Local Call Charges, By Nationality

	Mobile Voice
Overall	**89**
Qatari	96
Non- Qatari	88

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Fixed Voice: 993)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

Further, the local call charges are perceived relatively cheaper among Vodafone customers (93%) compared to Ooredoo ones (86%). The satisfaction with local call charges is significantly higher for postpaid customers as compared to prepaid customers for mobile voice service.

Table 52: Perception on Mobile Local Call Charges, By Service Provider

	Mobile Voice
Overall	**89**
Ooredoo	86
Vodafone	93

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Fixed Voice: 993)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

Table 53: Perception on Mobile Local Call Charges, By Type of Connection

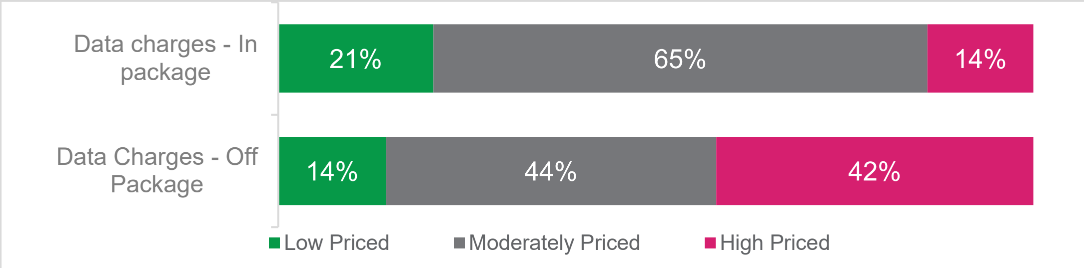
	Mobile Voice
Overall	**89**
Prepaid	86
Postpaid	97

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Fixed Voice: 993)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

Perception on Mobile Data Charges

While majority of the customers perceive the in-package mobile data charges to be moderate (65%) or low (21%), the relevant rates for both categories are lower for the off-package mobile data charges. Further, a significant proportion (42%) of customers perceive the off-package data charges as highly priced.

Figure 25: Mobile Data Charges Perception



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Internet: 2176)
Note: Numbers may not add up to 100 percent due to rounding off

While the satisfaction with in-data mobile data charges is higher among Qatari, the off- package mobile data charges are similarly perceived by both Qataris and Non-Qataris. The satisfaction with mobile data charges is higher among Vodafone customers for both in-package and off- package services. Postpaid users (in-package 93% and 62% off- package services) are also more likely to say that they are satisfied with the mobile data charges as compared to pre-paid customers (in-package 83% and 57% off-package services).

Table 54: Perception on Mobile Data Charges, By Nationality

	In Package	Off Package
Overall	**86**	**58**
Qatari	92	58
Non- Qatari	85	58

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Internet: 2176)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

Table 55: Perception on Mobile Data Charges, By Service Provider

	In Package	**Off Package**
Overall	**86**	**58**
Ooredoo	82	52
Vodafone	92	68

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Internet: 2176)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

Table 56: Perception on Mobile Data Charges, By Type of Connection

	In Package	**Off Package**
Overall	**86**	**58**
Prepaid	83	57
Postpaid	93	62

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Internet: 2176)
Figures above represent proportion (%) of customers rating moderate/low/ very low priced

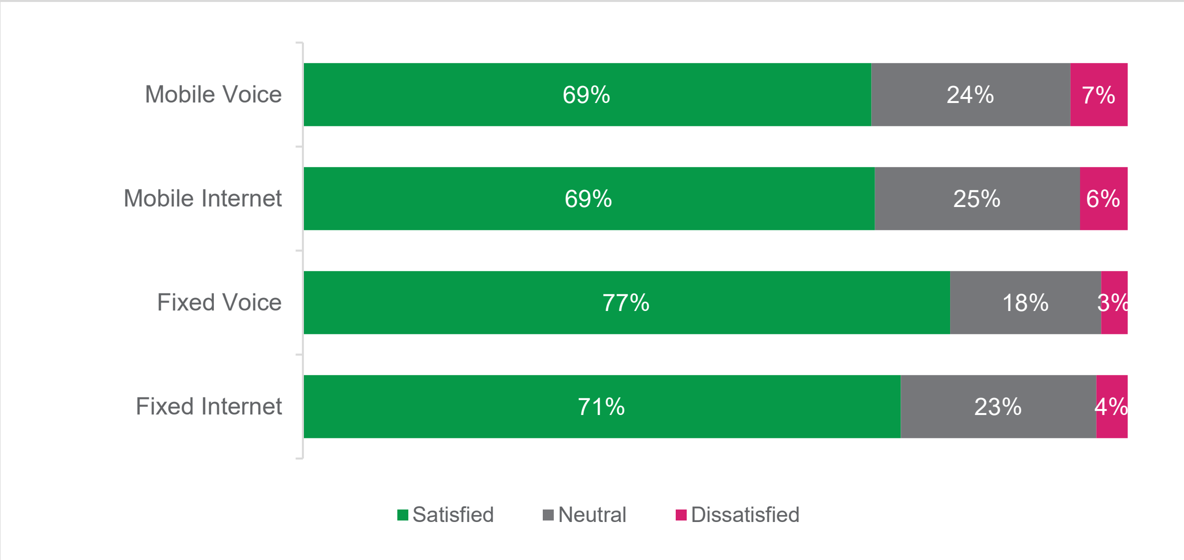
4.7. Customer Perceptions on Rate Plans/ Tariffs

Customer perception on rate plans and tariffs has an impact on the overall satisfaction with the services – therefore, this chapter of the report presents in detail survey findings related to terms & conditions, transparency of prices, variety of plans and ease of understanding of bundled packages.

Perception on Terms and Conditions

Almost seven in ten customers are satisfied with clear terms and conditions of rate plans across all the services. The satisfaction on clear terms and conditions is highest among fixed voice (77%), followed by fixed internet (71%). Consequently, the dissatisfaction is highest for mobile voice (7%), followed by mobile internet (6%).

Figure 26: Satisfaction with Clear Terms and Conditions



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

The satisfaction related terms and conditions varies with nationality. For mobile voice, the rate is significantly higher among Qatari (80%) as compared to Non-Qatari (67%). Similarly, the satisfaction is also higher among Qataris for mobile internet and fixed voice. For fixed internet, the satisfaction remains similar for Qataris and non-Qataris.

Table 57: Satisfaction with Terms and Conditions, By Nationality

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**69**	**69**	**77**	**71**
Qatari	80	77	82	71
Non- Qatari	67	67	76	71

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied

The satisfaction with clear terms and conditions of rate plans is quite similar for both Ooredoo and Vodafone customers across services.

Table 58: Satisfaction with Clear Terms and Conditions, By Service Provider

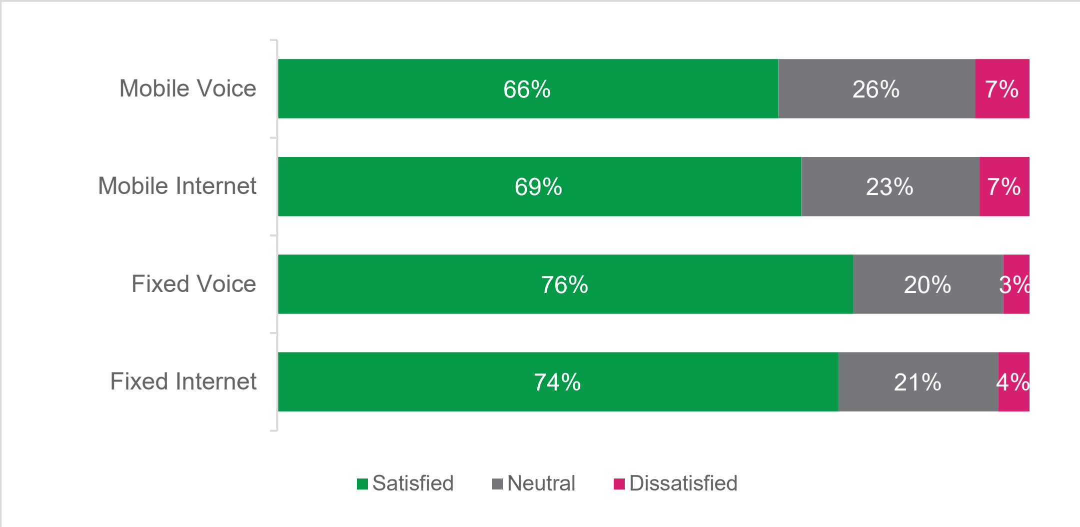
	Mobile Voice	Mobile Internet
Overall	**69**	**69**
Ooredoo	69	68
Vodafone	68	69

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176)
Figures above represent proportion (%) of customers satisfied
Note: The sample for fixed service customers is not statistically enough to report by service providers

Perception on Transparency of Prices

Customers are mostly satisfied with the transparency of prices across different services. The satisfaction is highest for fixed voice (76%) and lowest for mobile voice service (66%). The dissatisfaction with price transparency is highest for mobile voice and mobile internet (7% for both categories).

Figure 27: Satisfaction with Transparency of prices



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

The satisfaction with price transparency is relatively higher among Qataris for mobile voice, mobile internet and fixed voice compared to non-Qataris (see **Table 59**). However, for fixed internet services, the satisfaction rate is relatively higher among Non-Qataris (74%) as compared to Qatari (70%).

Table 59: Satisfaction with Transparency of prices, By Nationality

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**66**	**69**	**76**	**74**
Qatari	73	78	81	70
Non- Qatari	65	68	74	74

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied

In terms of transparency of prices, there is no significant difference between service providers for both mobile voice and mobile internet services.

Table 60: Satisfaction with Transparency of prices, By Service Provider

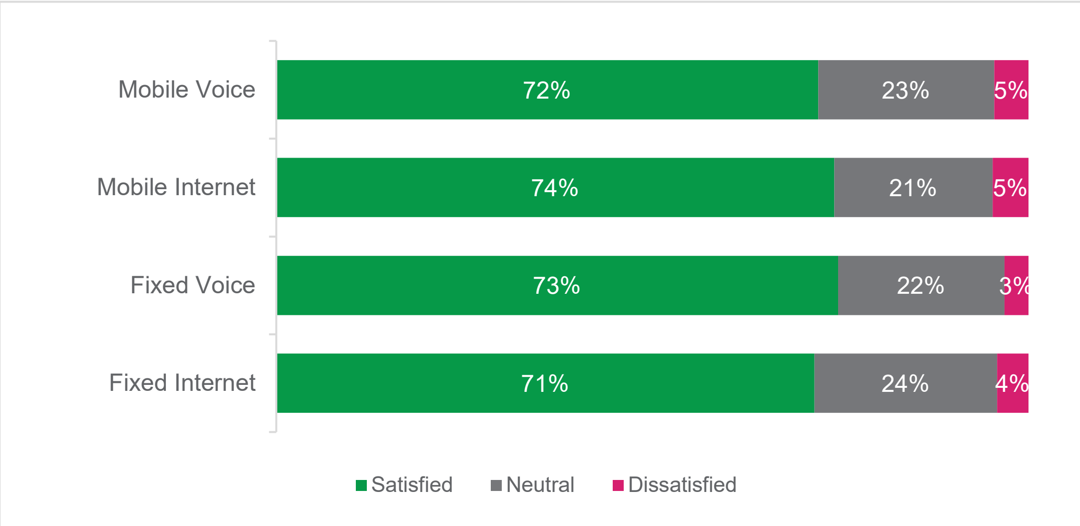
	Mobile Voice	Mobile Internet
Overall	**66**	**69**
Ooredoo	67	69
Vodafone	66	69

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied

Perception on Variety of Rate Plans

With seven out of ten customers satisfied, customers have overall positive perception in terms of variety of rate plans across difference services. Further the dissatisfaction is also low (5% or less) across all four services.

Figure 28: Satisfaction with Variety of Rate Plans



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

The findings suggest that variety of rate plans satisfaction rate is higher among Qataris for all service categories apparat from fixed Internet.

Table 61: Satisfaction with Variety of Rate Plans, By Nationality

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**72**	**74**	**73**	**71**
Qatari	77	78	79	72
Non- Qatari	71	73	72	70

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied

Further, the satisfaction with variety of rate plans is in the same range for Ooredoo and Vodafone customers across mobile voice and mobile internet services.

Table 62: Satisfaction with Variety of Rate Plans, By Service Provider

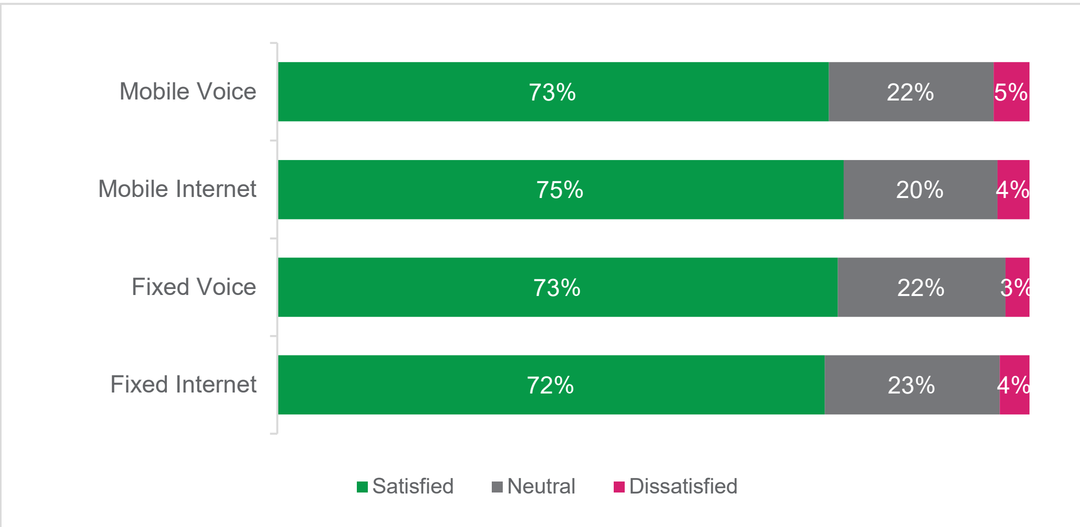
	Mobile Voice	Mobile Internet
Overall	**72**	**74**
Ooredoo	72	74
Vodafone	71	72

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied
Note: The sample for fixed service customers is not statistically enough to report by service providers

Perception on Ease of understanding for Bundled Packages

Majority of the customers are satisfied with the ease of understanding for bundled packages across different services. The satisfaction is highest among mobile internet users (75%) and lowest among fixed internet (72%) suggesting minimal variation in terms of satisfaction across services.

Figure 29: Satisfaction with Ease of Understanding for Bundled Packages



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

The research further reveals that the satisfaction with ease of understanding for bundled packages is higher among Qataris compared to other nationalities for mobile voice, with similar satisfaction rates across nationalities for fixed services.

Table 63: Satisfaction with Ease of Understanding for Bundled Packages, By Nationality

	Mobile Voice	Mobile Internet	Fixed Voice	Fixed Internet
Overall	**73**	**75**	**73**	**72**
Qatari	85	84	71	74
Non- Qatari	72	74	73	71

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied

Satisfaction with ease of understanding for bundled packages does not show much variation with service providers. While are the same for mobile voice services, there is small variation of 3% for mobile internet with Ooredoo being the positive party.

Table 64: Satisfaction with Ease of Understanding Bundled Packages, By Service Provider

	Mobile Voice	Mobile Internet
Overall	**73**	**75**
Ooredoo	73	76
Vodafone	73	73

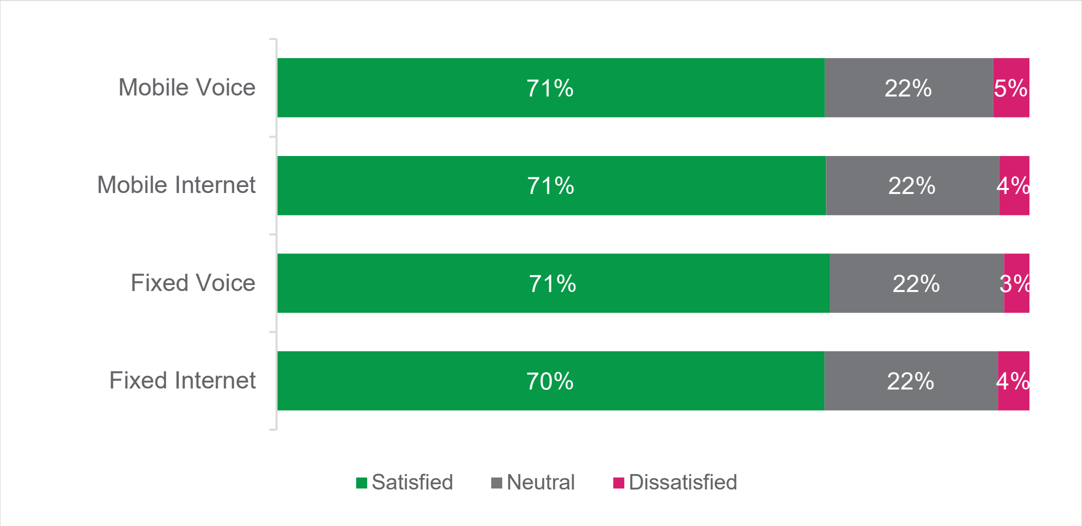
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied
Note: The sample for fixed service customers is not statistically enough to report by service providers

Perception on Tariffs Publishing

The CRA mandate requires the service providers to publish all tariff plans and make them accessible to customer through multiple channels such as print, website, stores, etc. This is to ensure fairness and transparency on ‘access to information’.

With seven in ten satisfied, customers in general are satisfied with tariffs publishing across different services. The satisfaction rate is similar across services and the dissatisfaction is also low (5% or less) for all services categories.

Figure 30: Satisfaction with Tariffs Publishing



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

The satisfaction with tariffs publishing shows minimum variation by service provider, relatively lower rates for Vodafone (see **Table 65**).

Table 65: Satisfaction with Publishing of Tariff, By Service Provider

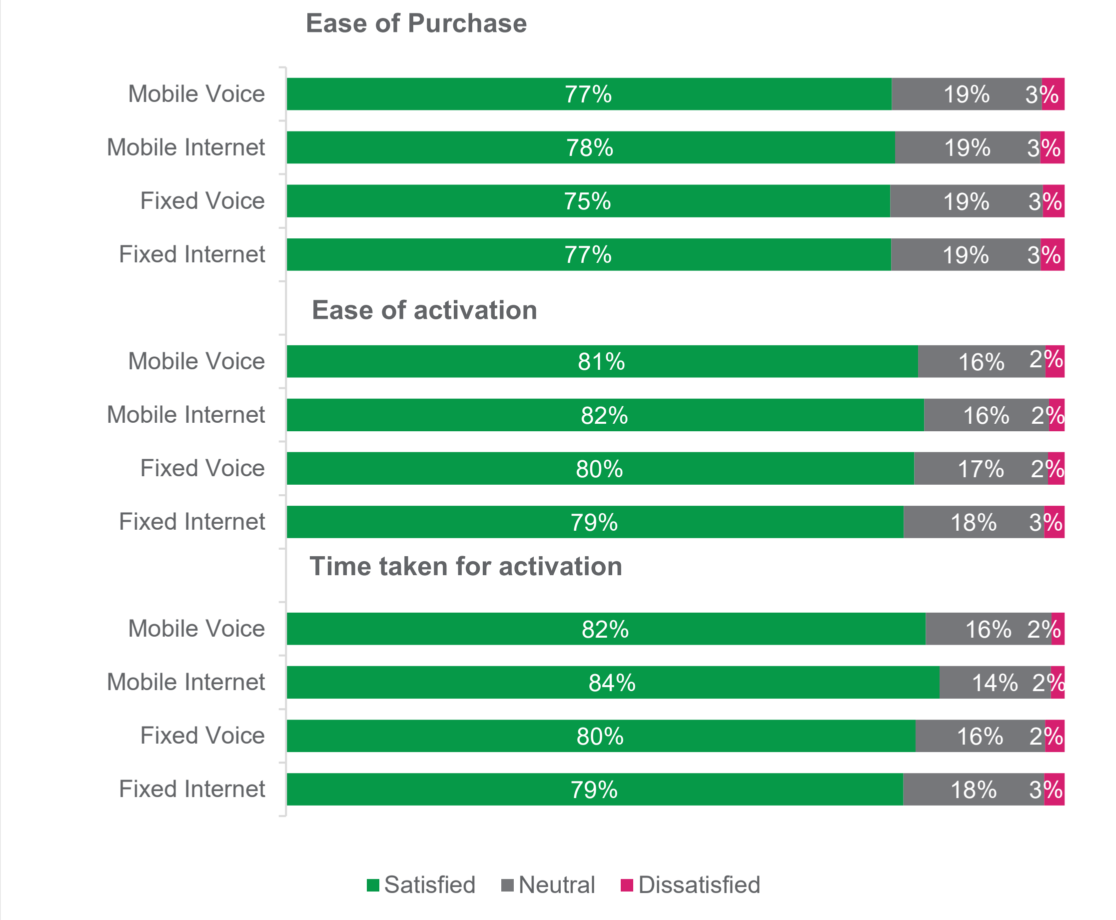
	Mobile Voice	Mobile Internet
Overall	**71**	**71**
Ooredoo	72	72
Vodafone	70	69

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied
Note: The sample for fixed service customers is not statistically enough to report by service providers

4.8. Customer Perceptions on Provisioning (Purchase and Activation process)

Based on the survey results, customers of communications services in Qatar are in general satisfied with the provision related aspects such as ease of purchase, ease of activation and time taken for activation across all surveyed communication services. Ease of time for activation have slightly better satisfaction rates compared to the mobile voice / internet services.

Figure 31: Satisfaction with provisioning parameters



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

Over time, the perception on ease of purchase has remained steady, while the satisfaction rates for ease of activation for mobile voice, mobile internet and fixed internet services have improved.

Table 66: Satisfaction with Provisioning Parameters, 2014 to 2018

	Ease of Purchase		Ease of Activation	
	2018	2014	2018	2014
Mobile Voice	97	98	98	85
Mobile Internet	97	100	98	77
Fixed Voice	97	97	98	93
Fixed Internet	97	99	97	89

Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Percentage reporting for 2018 is Top3 for similar comparison

When comparing service providers, Ooredoo is better rated compared to Vodafone across all categories for both mobile voice and mobile Internet services.

Table 67: Satisfaction with Provisioning Parameters, By Service Providers

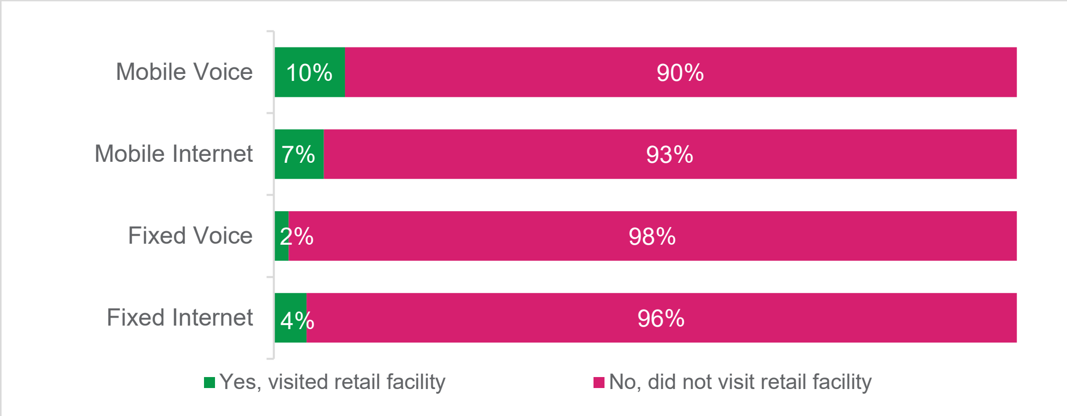
	Mobile Voice	Mobile Internet
Ease of Purchase		
Overall	**77**	**78**
Ooredoo	80	79
Vodafone	74	75
Ease of Activation		
Overall	**81**	**82**
Ooredoo	84	84
Vodafone	77	79
Time for Activation		
Overall	**82**	**84**
Ooredoo	83	85
Vodafone	81	82

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Figures above represent proportion (%) of customers satisfied
Note: The sample for fixed service customers is not statistically enough to report by service provider

4.9. Customer Perceptions on Retail Facilites

As per the survey results, the percentage of customers visiting the retail facilities for different services is very limited - 10% of mobile voice customers and only 2% of customers of fixed voice have visited retail facilities in the last 6 months.

Figure 32: Visit of Retail Facility



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

Satisfaction with retail stores sufficiency is highest among fixed internet customers (78%), while it is relatively lower for both mobile voice (66%) and mobile internet (68%) customers. Further, no significant variation is observed in terms of ease of access to retail stores for different services. The satisfaction with knowledge of personnel and ability of personnel to resolve queries is relatively lower among mobile internet customers. (59% and 54% respectively). In terms of the service providers, Vodafone customers have relatively lower satisfaction on aspects of knowledge of personnel and ability of personnel to resolve queries for mobile internet services. (**Table 68**).

Table 68: Satisfaction with Retail Facilities Parameters

	Mobile Voice	Mobile Internet
Overall	**66**	**68**
Ooredoo	68	66
Vodafone	64	71
Overall	**65**	**65**
Ooredoo	68	67
Vodafone	63	63
Overall	**65**	**59**
Ooredoo	66	62
Vodafone	64	56
Overall	**63**	**54**
Ooredoo	62	57

Vodafone	64	53

Source: Customer Satisfaction Survey 2018; Overall Sample n=231, Visited Retail facility (Mobile Voice: 2335; Mobile Internet: 140; Fixed Voice: 19; Fixed Internet: 46)
Figures above represent proportion (%) of customers satisfied
Note: The sample for fixed service customers is not statistically enough to report by service providers

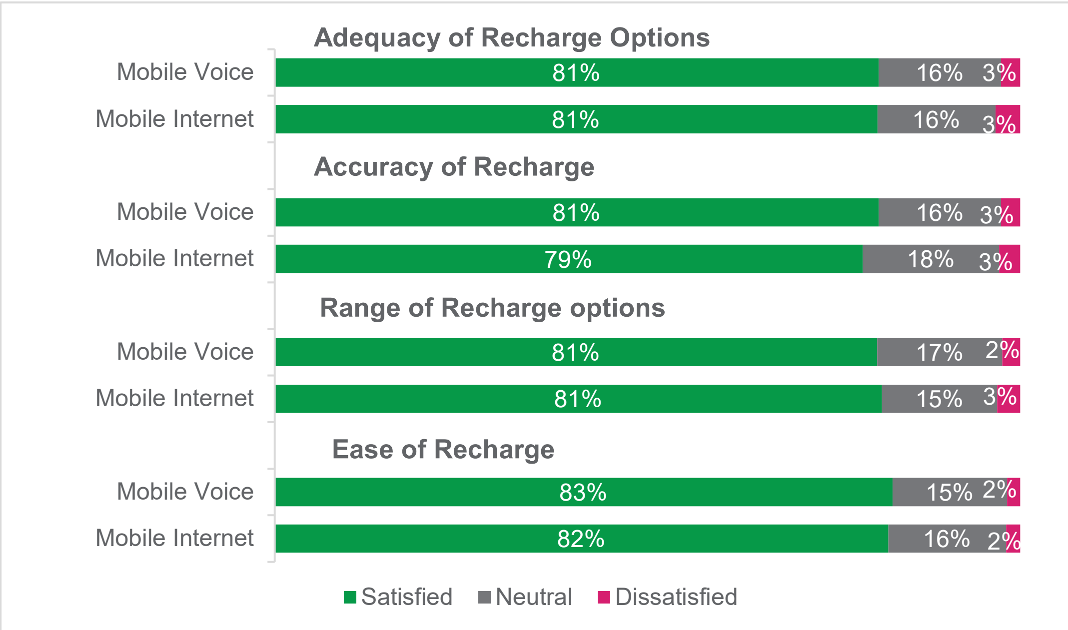
4.10. Customer Perceptions on Recharge, Billing and Payment

Perceptions on recharge for prepaid and billing, payment process for postpaid is part of mandate of CRA to protecting customers from misleading and unfair practices. The following sections looks at customer perception on recharge, billing and payment process.

Perception on Mobile Pre-paid Service Recharge

Customers are in general satisfied (4 out of 5 respondents are satisfied) with the different aspects of recharge, such as adequacy of recharge options, accuracy of recharge, range of recharge options and ease of recharge.

Figure 33: Perception on Mobile Pre-paid Service Recharge



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176)
Note: Numbers may not add up to 100 percent due to rounding off

Customer satisfaction with recharge is slightly lower among Vodafone customers as compared to Ooredoo customers across all parameters and both mobile voice and mobile internet services. The difference in satisfaction is on average 5 percentage points lower for Vodafone across all categories.

Table 69: Satisfaction with Prepaid Parameters, By Service Providers

	Mobile Voice	Mobile Internet
Adequacy of Recharge options		
Overall	**81**	**81**

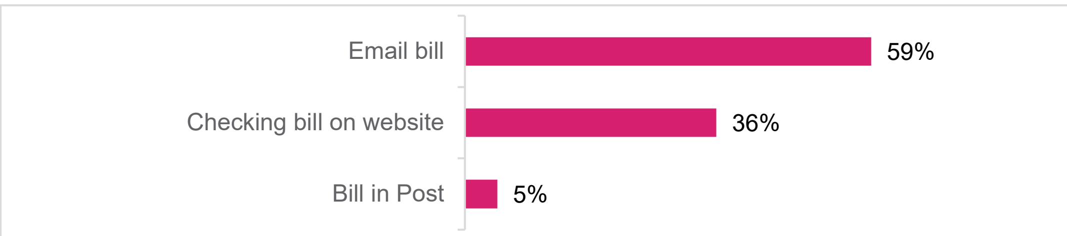
Ooredoo	83	83
Vodafone	78	77
Accuracy of recharge		
Overall	**81**	**79**
Ooredoo	84	80
Vodafone	76	76
Range of recharge options		
Overall	**81**	**81**
Ooredoo	84	84
Vodafone	75	77
Ease of Recharge		
Overall	**83**	**82**
Ooredoo	86	84
Vodafone	78	79

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176)
Figures above represent proportion (%) of customers satisfied

Perception on Postpaid Mobile Services

When looking at the post-paid mobile services, in terms of preference for the mode of receiving bill, customers seem to be very much in alignment with the green billing concept - 59% among postpaid customers opt for email billing and 36% check their bills on the website. Only 5% prefer bill sent by post (**Figure 34**).

Figure 34: Preferred Mode for Receiving Bill

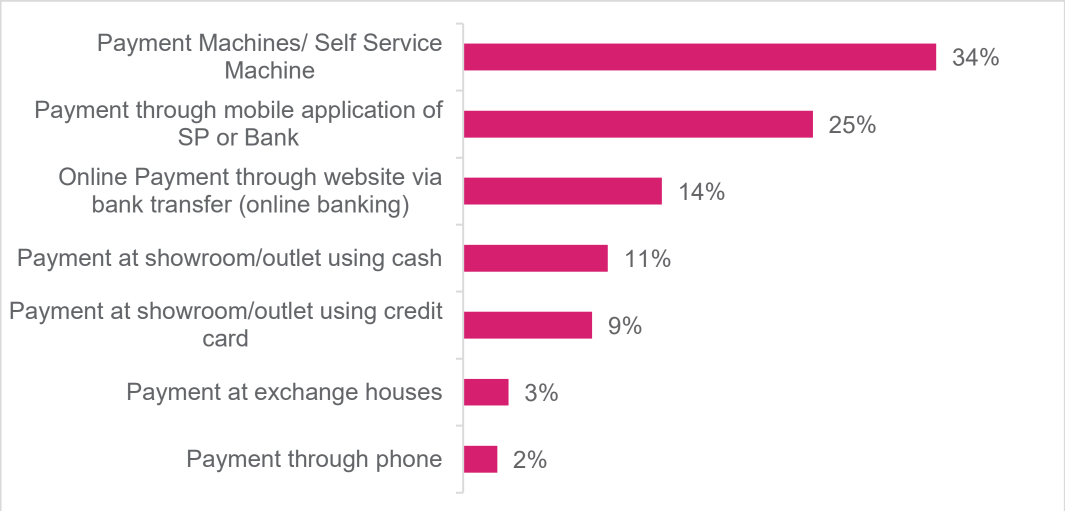


Source: Customer Satisfaction Survey 2018; Postpaid Customers n= 1476

Payment machines or self-service machines are the most preferred mode of payment among customers (34% of respondents), followed by mobile applications (25%) and online banking (14%). Payment at showroom either through cash (11%) or card (9%)

are less popular modes for bill payment among customers (**Figure 35**).

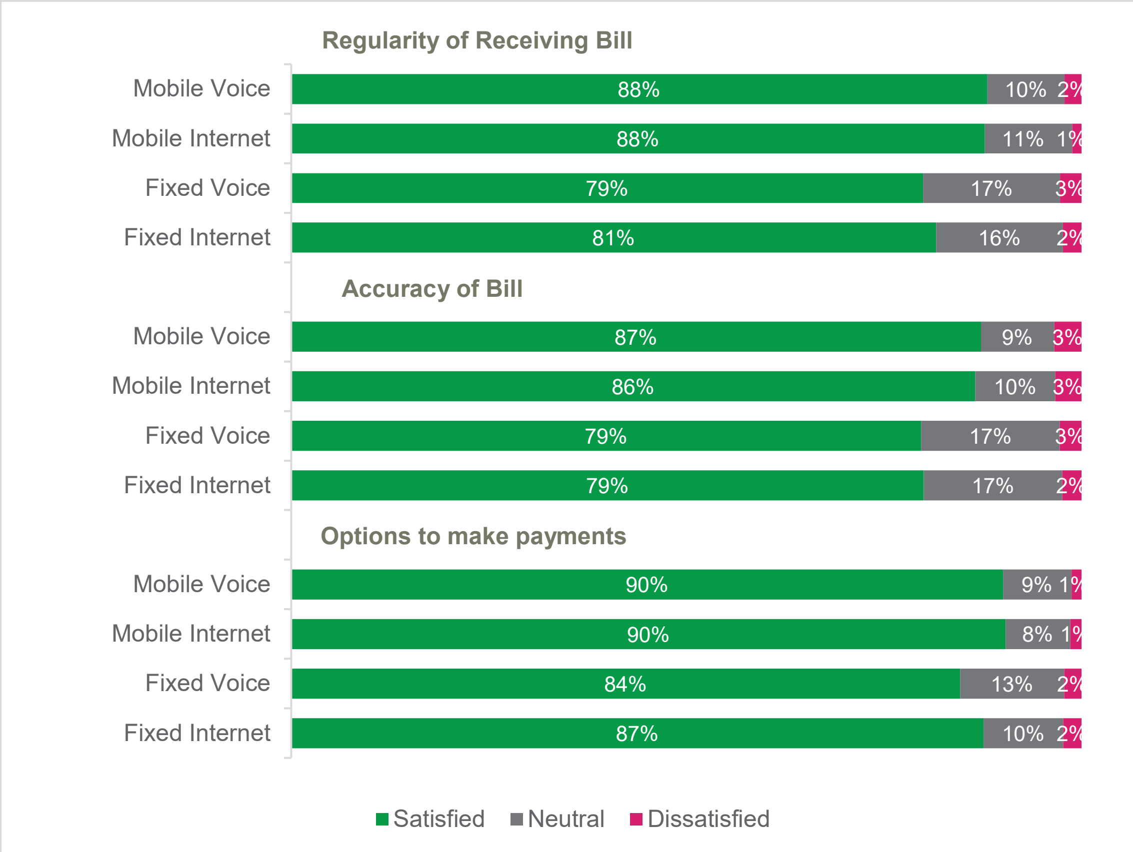
Figure 35: Preferred Mode for Bill Payment



Source: Customer Satisfaction Survey 2018; Postpaid Customers n= 1476

Majority of the customers remain satisfied with payment related aspects, with dissatisfaction between 1% to 3% across different services. Satisfaction rates are relatively higher for mobile services (voice and internet) compared to fixed services (voice and fixed) across all categories – bill regularity, accuracy and payment options.

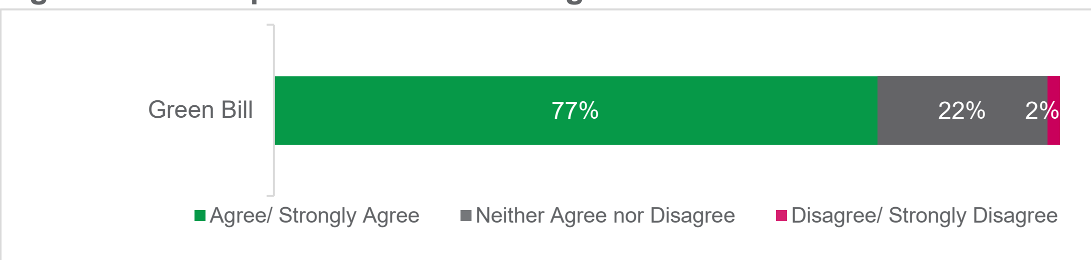
Figure 36: Perception on Payment Parameters



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Postpaid Mobile Voice: 733; Postpaid Mobile Internet: 819; Fixed Voice: 992; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

In addition, customers have highly positive perception on the Green Bill initiative with 77% of customers showing agreement with it (**Figure 37**).

Figure 37: Perception on Green Billing



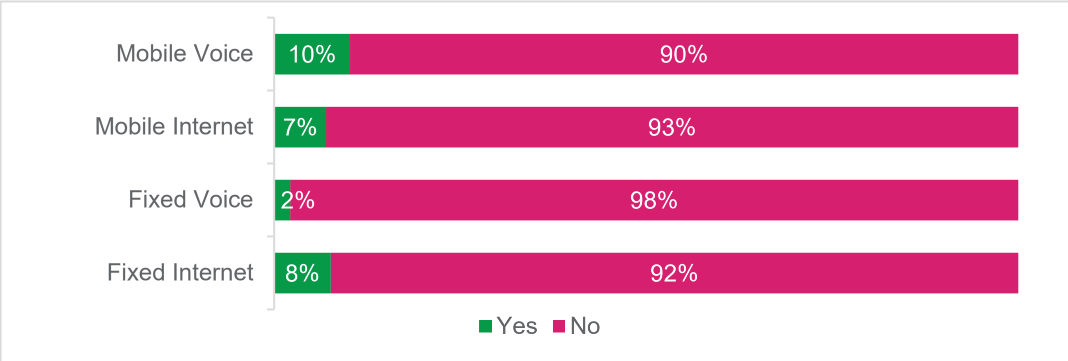
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Billing customer n= 1452)
Note: Numbers may not add up to 100 percent due to rounding off

4.11. Complaint Resolution Mechanism

Another key mandate for the CRA is to manage customer complaints and resolve disputes in a manner that is transparent, fair and effective. In this context, it is critical to understand the complaint resolution mechanism for customers, channels used, actual complaints, satisfaction with complaint resolutions, awareness and usage of complaint escalation processes.

The research suggests that the incidence of lodging complaints is highest among mobile voice users (10% of the customers have raised a complaint) is highest and lowest among fixed voice users (only 2% of them). (see **Figure 38**).

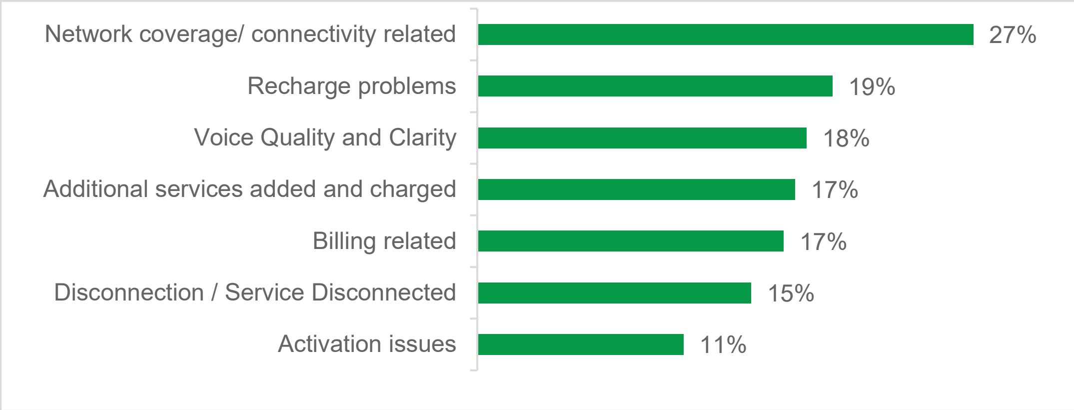
Figure 38: Raised a compliant



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice:2332; Mobile Internet: 2172; Fixed Voice: 992; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

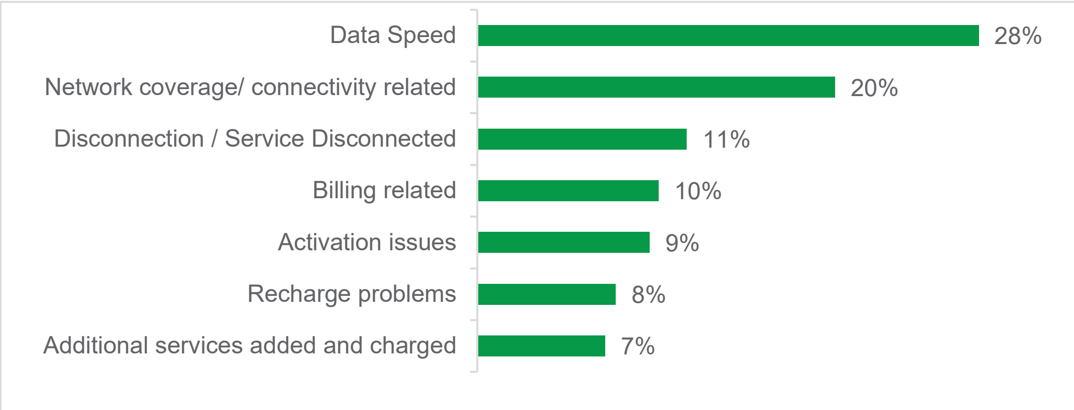
Reasons for complaints vary across communication services. The research reveals that network coverage or connectivity related (27% of customers who have raised complaint) is the main reason for raising a complaint for mobile voice service (see **Figure 39**); while data speed (28%) and network coverage or connectivity (20%) are the main reasons for raising complaints for mobile Internet (see **Figure 40**). Disconnection of service (31%) and data speed (29%) are the main reasons for raising complaint for the Fixed Internet Services (see **Figure 41**).

Figure 39: Reasons for Complaint for Mobile Voice



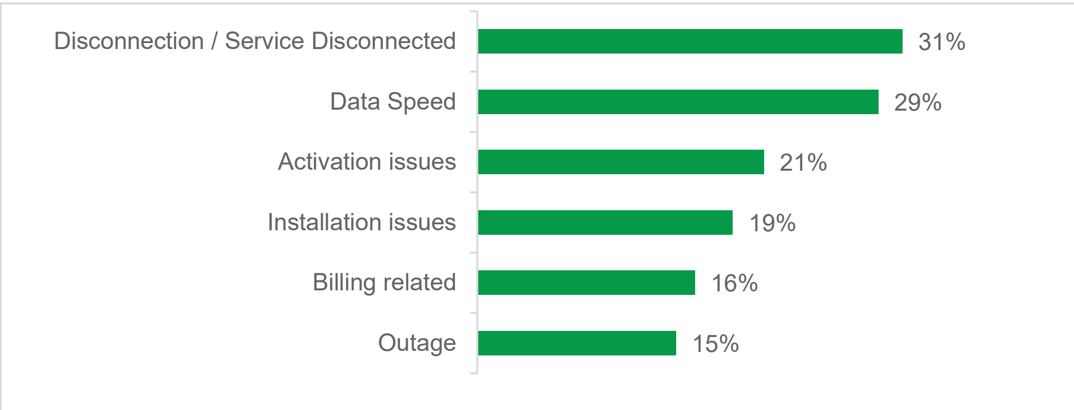
Source: Customer Satisfaction Survey 2018; Sample of those who said yes to raise complaints for Mobile Voice n= 233

Figure 40: Reasons for Complaint for Mobile Internet



Source: Customer Satisfaction Survey 2018; Sample of those who said yes to raise complaints for Mobile Internet n= 152

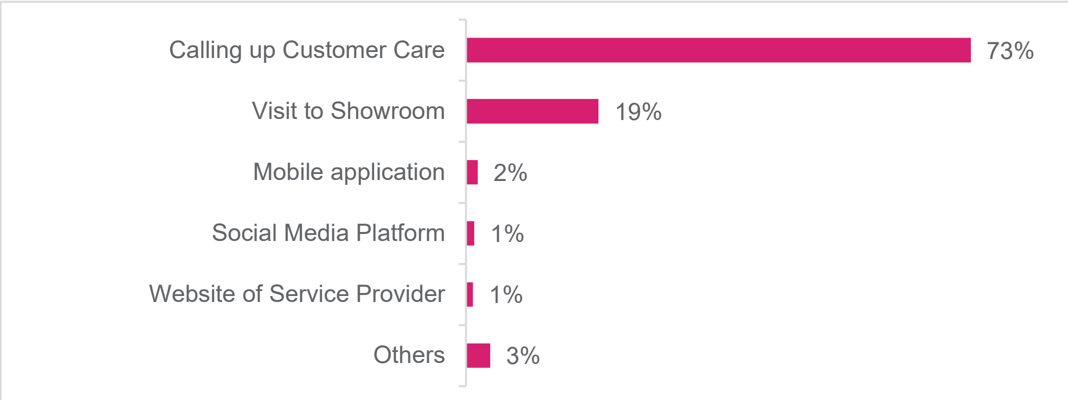
Figure 41: Reasons for Complaint for Fixed Internet



Source: Customer Satisfaction Survey 2018; Sample of those who said yes to raise complaints for Fixed Internet n= 95

Majority of the customers prefer to contact call center to raise a complaint (73% of respondents) prefer to call the customer care, while 19% of them prefer to visit a showroom. (see **Figure 42**). The fact that customers highly rely on call center raises the need for service providers to ensure available infrastructure and other resources can handle the traffic.

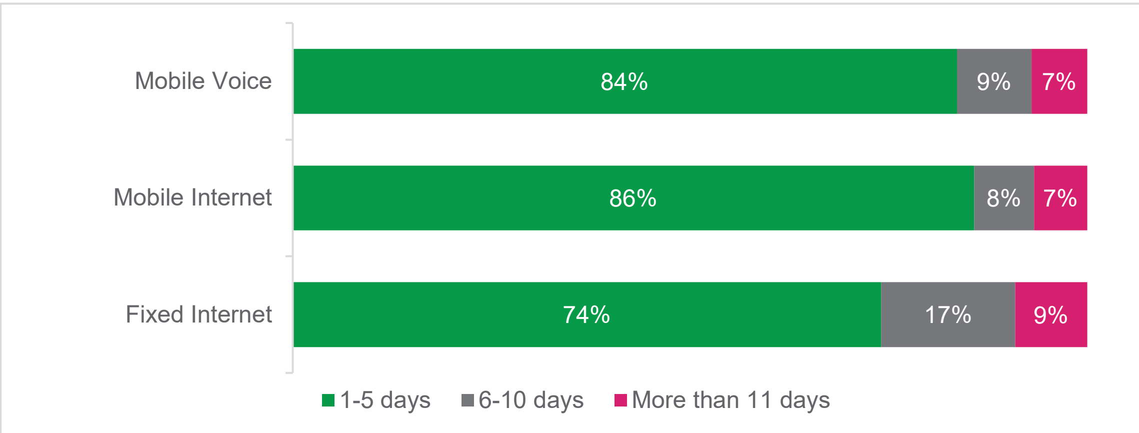
Figure 42: Most used mode for raising a complaint



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362

Most of the customers across different surveyed services claim that the average time taken for the resolution of queries or complaints should be 1-5 days. The expectation is higher for mobile voice (84% expect resolution in 1- 5 days) and mobile internet (86% of respondents) (see **Figure 43**).

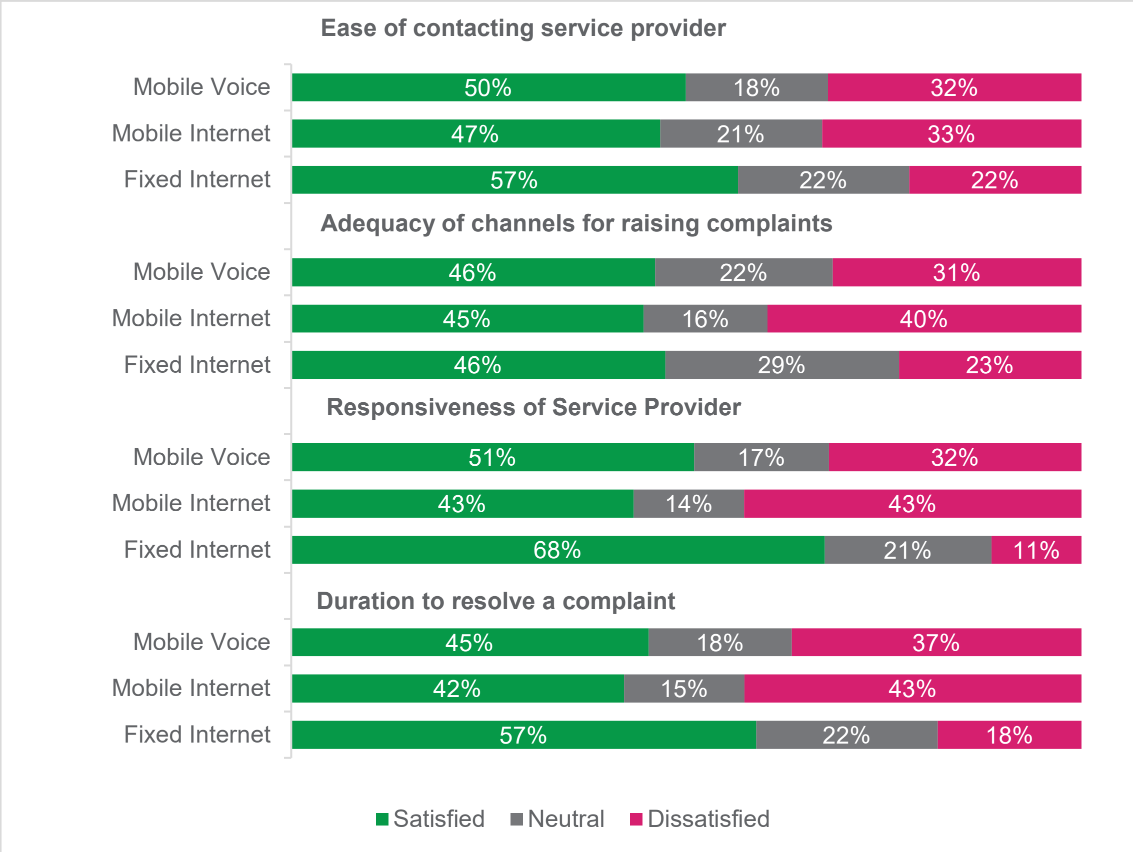
Figure 43: Time expectation for resolution of query



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Internet: 1138)
Note: Numbers may not add up to 100 percent due to rounding off

The survey results further show high customer dissatisfaction with compliant resolution. The ease of contacting the service provider registered a high dissatisfaction rate - 32% of those raising complaint for mobile voice, 33% among those raising complaint for mobile internet and 22% among those raising complaint for fixed internet. The dissatisfaction is also considerably higher on adequacy of channels for raising complaints for all services. Across services, the dissatisfaction is highest for mobile voice. Compared across services and categories, the dissatisfaction for responsiveness of the service provider and duration for resolution is lowest among customers raising complaints for fixed internet services.

Figure 44: Satisfaction with Complaint Resolution parameters



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Raised Complaint - Mobile Voice: 233; Mobile Internet: 152; Fixed Internet: 92)
Note: Numbers may not add up to 100 percent due to rounding off

The satisfaction with complaint resolution parameters is low across service providers for both mobile voice and mobile Internet services. For mobile voice, ease of contacting service provider satisfaction is slightly higher among Vodafone customers (52%) as compared to Ooredoo (47%), while the adequacy of channels satisfaction is slightly higher for Ooredoo (49%) as compared to Vodafone (43%). In terms of satisfaction with responsiveness of service provider and duration to resolve, no significant variation is observed between the service providers.

Table 70: Satisfaction with Complaint Resolution Parameters - By Service Provider

	Mobile Voice	Mobile Internet
Ease of contacting service provider		
Overall	**50**	**47**
Ooredoo	47	46
Vodafone	52	48
Adequacy of channels for raising complaints		

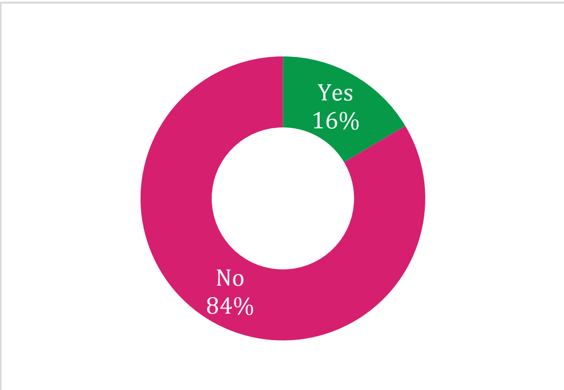
Overall	**46**	**45**
Ooredoo	49	42
Vodafone	43	48
Responsiveness of Service Provider		
Overall	**51**	**43**
Ooredoo	50	47
Vodafone	52	38
Duration to resolve a complaint		
Overall	**45**	**42**
Ooredoo	46	45
Vodafone	44	39

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Raised Complaint - Mobile Voice: 233; Mobile Internet: 152; Fixed Internet: 92)
Figures above represent proportion (%) of customers satisfied

In terms of Mobile Internet, the customer satisfaction varies widely with the service providers for different parameters of complaint resolution. Satisfaction with ease to contact the providers and adequacy of channels is lower for Ooredoo (46% and 42% respectively compared to 48% across both categories for Vodafone), while satisfaction with responsiveness of service provider is lower for Vodafone customers (38% vs. 47% for Ooredoo). Similarly, for duration to resolve a complaint satisfaction is lower among Vodafone customers (39% for Vodafone and 45% for Ooredoo). (see **Table 70**).

The CRA has established a complaint escalation process, where all customers of communication services in Qatar can escalate their complaints to the CRA in case of non-resolution by the provider. According to the survey, only 16% of the surveyed customers are aware of this complaint escalation process. This necessitates the need for the CRA to implement further steps to increase the awareness and educate the customers on availability of different channels and processes for raising and resolving a complaint and its escalation with the CRA.

Figure 45: Awareness of Complaint Escalation Process

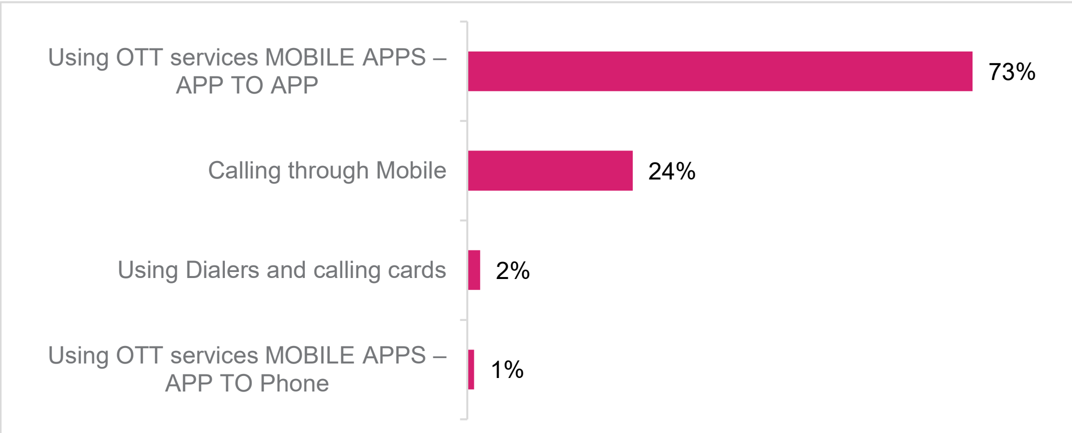


Source: Customer Satisfaction Survey 2018; Overall Sample n=2362
Note: Numbers may not add up to 100 percent due to rounding off

4.12. Perception on International Calling

Due to Qatar's specific demographics and high share of expat population, high use of international calling services may be expected. The survey findings suggest that the customers use different methods to keep in touch with their family members and friends in their home countries, with OTT services being the most popular among customers for international calling. The usage of OTT services consisting of calls from Apps to Apps like WhatsApp, Skype, IMO, etc. is very high, with 73% of customers preferring them for over other modes (see **Figure 46**).

Figure 46: Preferred Mode for International Calling



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362

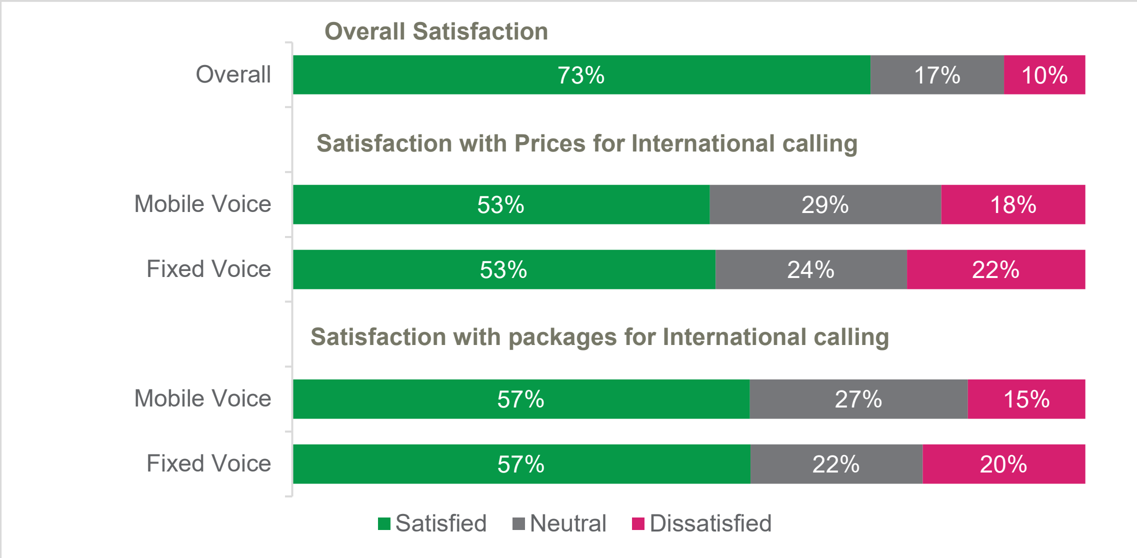
Overall, 73% of the customers are satisfied with their international calling experience from Qatar. However, about 10% of customers are not satisfied with overall international calling and this needs to be further analyzed an addressed (see **Figure 47**).

Customer satisfaction with prices for international calling is low with only 53% of the customers satisfied with the prices for both mobile and fixed voice services. Further, dissatisfaction is also high with 18% and 22% of customers dissatisfied with the prices for international calling for mobile voice and fixed voice services respectively.

Similarly, satisfaction is also low on packages for international calling for both mobile voice and fixed voice services. In addition, there is considerable level of dissatisfaction with 15% and 20% of customers dissatisfied with the package available for international calling for mobile voice and fixed voice services respectively.

CRA would need to coordinate with service providers to improve overall customer experience with international calling and provide packages and prices to meet the demand.

Figure 47: Customer Experience with International Calling

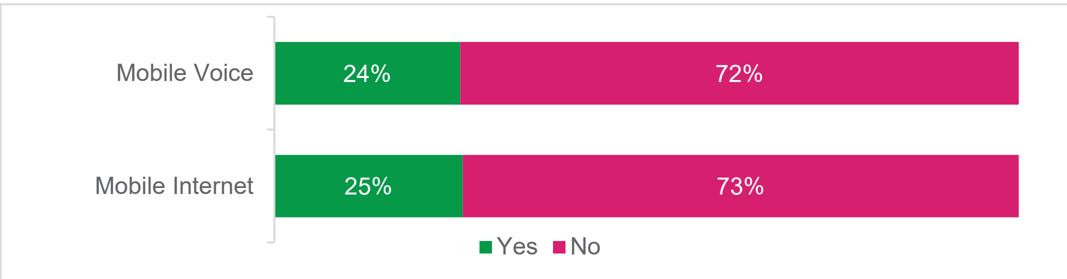


Source: Customer Satisfaction Survey 2018; Overall Sample n=2362
Note: Numbers may not add up to 100 percent due to rounding off

4.13. Perception on Roaming Services

Qatar population is quite mobile suggesting high need for roaming services. The research reveals that 24% of the customers have used mobile voice roaming, while 25% of them claim to have used mobile internet in roaming (see **Figure 48**).

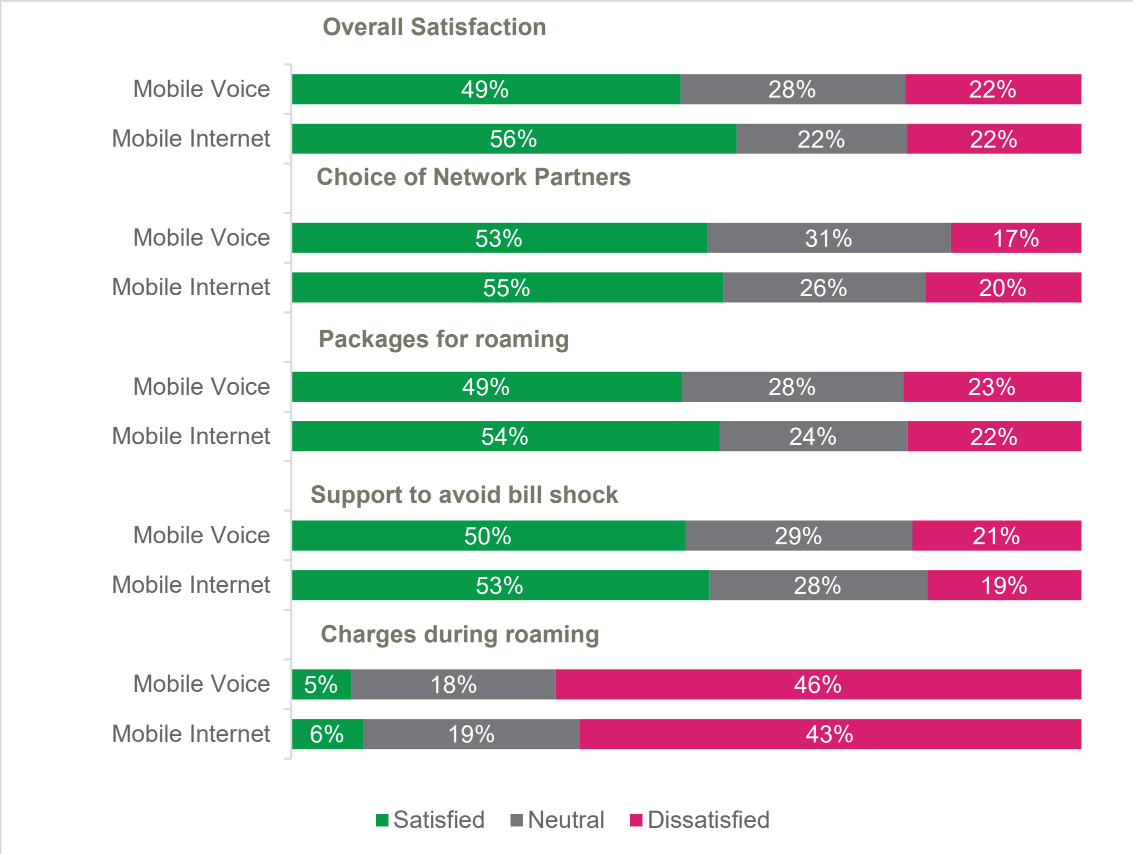
Figure 48: Availed Roaming Services



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice:2332; Mobile Internet: 2172)
Note: Numbers may not add up to 100 percent due to rounding off

The overall customer satisfaction with roaming is low, with only 49% of respondents satisfied with for mobile voice roaming and 56% satisfied with mobile internet in roaming. Further almost 22% of customers dissatisfied across both categories (see **Figure 49**).

Figure 49: Satisfaction with Roaming Services



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Availed roaming - Mobile Voice: 604; Mobile Internet: 572)
Note: Numbers may not add up to 100 percent due to rounding off

The customer satisfaction is low across all parameters for both mobile voice and internet. Roaming charges are with the highest dissatisfaction rates of 46% for mobile voice and 43% and mobile internet services respectively. This high level of dissatisfaction suggests that CRA needs to initiate steps to address the concerns of customers towards roaming services (see **Figure 49**).

The service providers have launched bill protection and bill manager services to help avoid bill shock[10] while in roaming, but the satisfaction on support for bill shock is limited at 50% for mobile voice and 53% for mobile internet suggesting there is need to educate the customers on the offers.

Compared over time, the overall satisfaction with voice roaming has maintained its level from 2014, while the satisfaction with mobile internet roaming has seen an improvement of 4 percentage points.

10 https://www.ooredoo.qa/portal/OoredooQatar/b2b-business-roaming
https://www.vodafone.qa/pressrelease/avoid-bill-shocks-exclusively-with-the-all-new-bill-manager-service-by-vodafone

Table 71: Satisfaction with Roaming Services, 2014 to 2018

	2018	2014
Mobile Voice Roaming	78	78
Mobile Internet Roaming	78	74

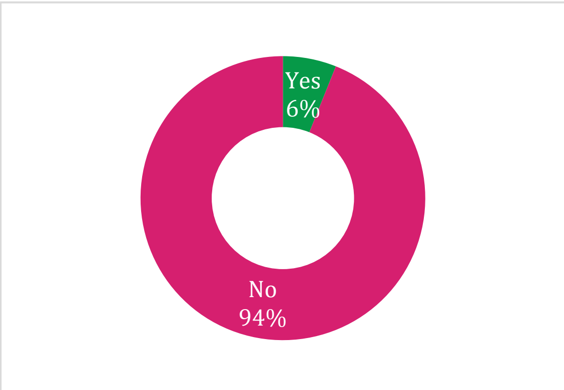
Figures above represent proportion (%) of satisfied consumers
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Mobile Voice: 2335; Mobile Internet: 2176; Fixed Voice: 993; Fixed Internet: 1138)
Note: Percentage reporting for 2018 is Top3 for similar comparison

4.14. Mobile Number Portability

Mobile Number Portability (MNP) has been launched in Qatar in the year 2013 (effective launch on 31st January 2013)[11]. It allows mobile customers of Ooredoo and Vodafone Qatar to retain their existing mobile number when switching between service providers. This service has been launched in Qatar to induce further competition and help liberalize the telecommunications sector.

The survey results show that 6% of the respondents have availed MNP services to port the number from one operator to another (see **Figure 50**).

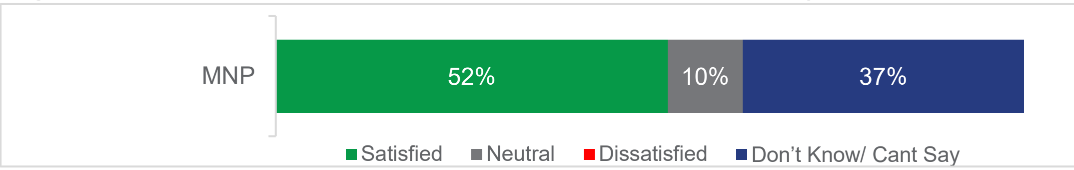
Figure 50: Availed Mobile Number Portability



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362
Note: Numbers may not add up to 100 percent due to rounding off

Customers who have used MNP services have positive experience, with more than 52% satisfied with the process. Further, there are no customers dissatisfied among customers who have availed MNP services.

Figure 51: Satisfaction with Mobile Number Portability



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Those who availed service n= 127)
Note: Numbers may not add up to 100 percent due to rounding off

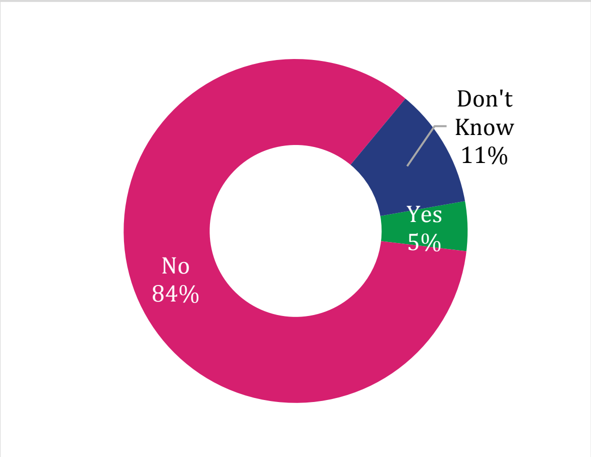
[11] http://www.cra.gov.qa/en/news/mobile-number-portability-services-rollout-qatar

4.15. Consumer Rights Protection

The CRA is also mandated to protect telecom customers from being misled by unfair practices. Hence, other important parameters are related to monitoring the impact of service providers advertising and tracking their campaigns for misleading advertising or marketing.

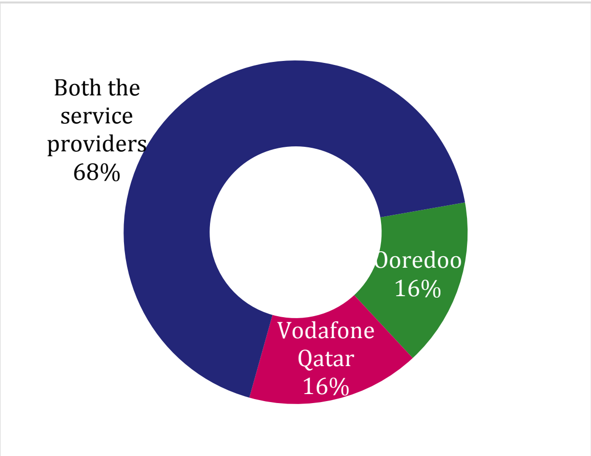
The research reveals that only 5% of the customers believe that the advertisements of service providers are misleading (see **Figure 52**). Among the customers who believe that there are misleading advertisements, majority are of the opinion such advertisements come from both service providers (see **Figure 53**). In addition (not shown in the graph below), customers believe that the misleading advertisements are mainly on price variations, offer applicability and terms and conditions associated with the offer, but not being reported.

Figure 52: Misleading Advertisements



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362
Note: Numbers may not add up to 100 percent due to rounding off

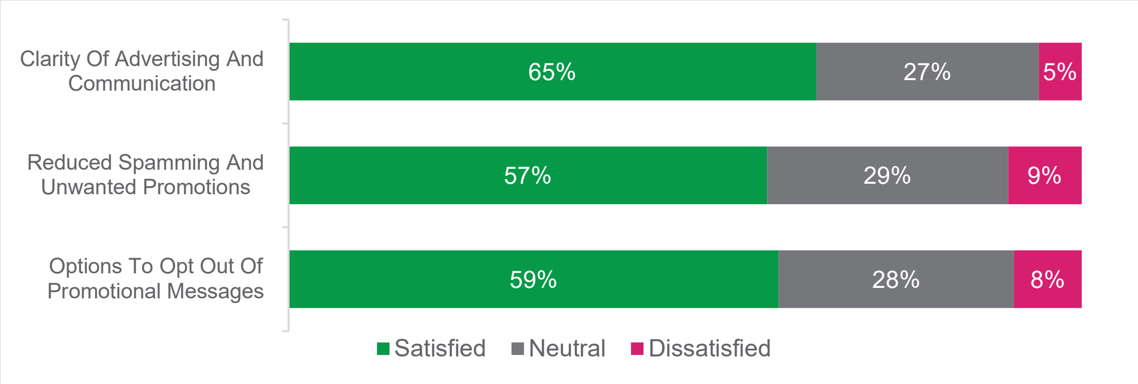
Figure 53: Operator with Misleading Advertisements



Source: Customer Satisfaction Survey 2018; Sample n=103, those who have answered Yes to misleading advertisements
Note: Numbers may not add up to 100 percent due to rounding off

Customers are quite satisfied with clarity of advertising and communication, reduced spamming and unwanted promotions and options to opt out of promotional messages, with dissatisfaction rates on these parameters in the range of 5-9 % respectively (see **Figure 54**).

Figure 54: Perception on Advertising and Promotional Messaging



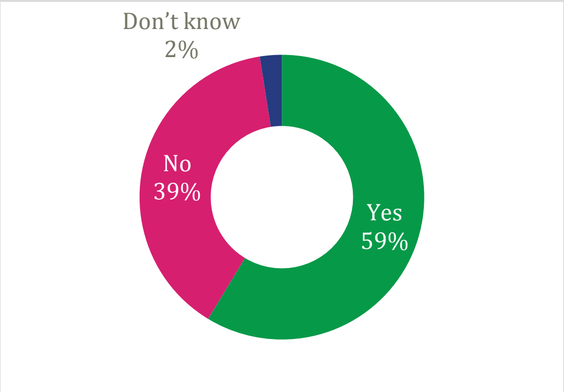
Source: Customer Satisfaction Survey 2018; Overall Sample n=2362
Note: Numbers may not add up to 100 percent due to rounding off

4.16. Public Wi-Fi

Qatar offers limited public WI-FI access to residents and visitors in various locations. The Ministry of Transport and Communication (MOTC) in collaboration with service providers offers public Wi-Fi in public parks through the iPark initiative. Further, some malls and public spaces also provide public Wi-Fi facilities. In addition, coffee shops and some retail establishments also have public Wi-Fi services for their visitors and customers.

The survey results show that 59% of the customers have availed some sort of public Wi-Fi services. This could be across different Wi-Fi access locations provided by various entities.

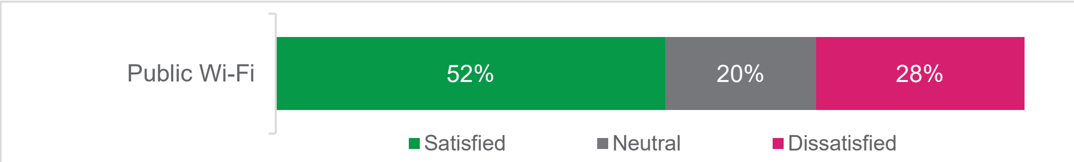
Figure 55: Availed Public Wi-Fi



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362
Note: Numbers may not add up to 100 percent due to rounding off

Overall, 52% of customers are satisfied with the available public Wi-Fi services. However, 28% of the customers are also highly dissatisfied. Since the entities offering the public Wi-Fi services are various, the experience is bound to be different and inconsistent across different facilities. CRA can educate customers in terms of usage of public Wi-Fi and the pitfalls of connecting to public Wi-Fi services.

Figure 56: Satisfaction with Public Wi-Fi



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Those who availed service n= 1526)
Note: Numbers may not add up to 100 percent due to rounding off

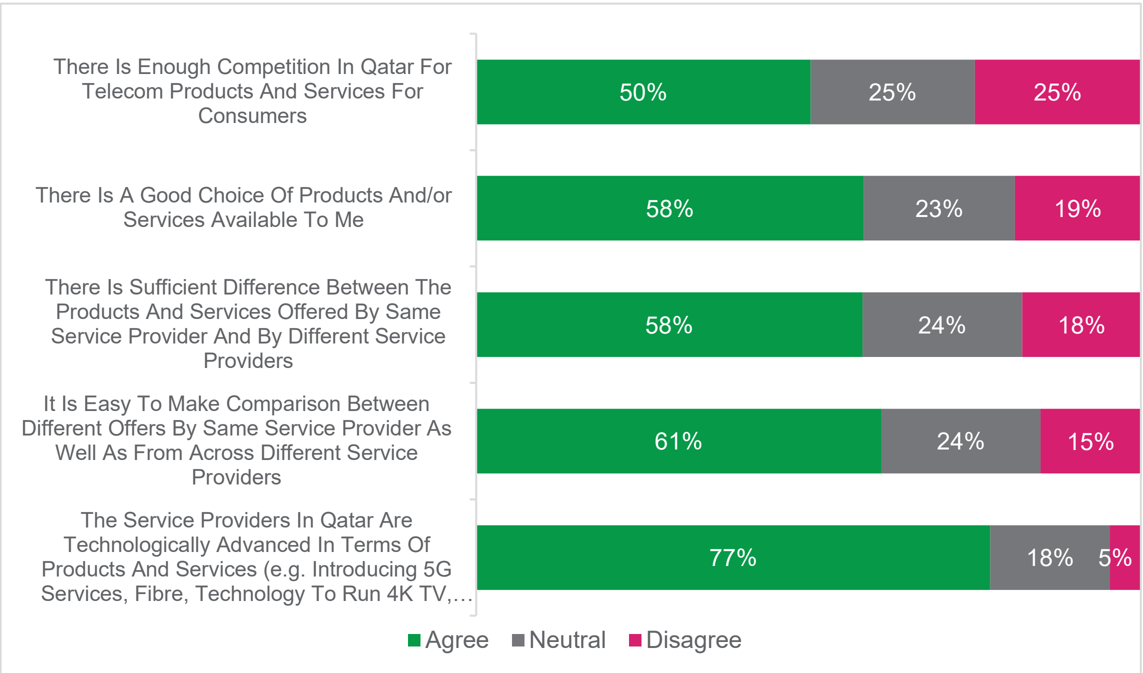
4.17. Market Competitiveness

As part of its mandate, CRA shall promote sustainable competition for the communication services market in Qatar. The research also tried to understand the perception of competitiveness in the communication market among customers.

One half (50%) of the survey respondents agree with the statement that, *'there is enough competition in Qatar for telecom products and services in Qatar'*. Further, 25% of the customers completely disagree with the statement indicating there is scope for improvement in terms of market competitiveness. In addition, the overall agreement at 58% to the statement *'there is good choice of products available to organization'* indicates that there is definitely room for improvement.

Customers are positively disposed to the notion that Qatar service providers introduce technologically advanced products, with more than 77% agreeing on this aspect.

Figure 57:Perception on Market Competitiveness



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362
Note: Numbers may not add up to 100 percent due to rounding off

Qataris have better perceptions on market competitiveness and this is evident with higher agreement on all parameters related to competition. Qataris agree to significantly higher extent that there is sufficient competition for telecom products and services (73% of them compared to 48% of non-Qataris). Similarly, they also highly agree on the availability of good choice of products (80% vs. only 56% of non-Qataris). The same trend is observed on other aspects of competitiveness like sufficient differentiation of products, ease of comparing products and service providers in Qatar considered technologically advanced.

Table 72: Market Competitiveness – By Nationality

Market Competitiveness	Overall	Qatari	Non - Qatari
There Is Enough Competition in Qatar For Telecom Products and Services for Consumers	50	73	48
There Is A Good Choice of Products And/or Services Available to Me	58	80	56
There Is Sufficient Difference between the Products and Services Offered by Same Service Provider and By Different Service Providers	58	75	56
It Is Easy to Make Comparison Between Different Offers by Same Service Provider as well as From Across Different Service Providers	61	73	59
The Service Providers in Qatar Are Technologically Advanced in Terms of Products and Services	77	88	76

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362
Figures above represent proportion (%) of customers satisfied

The competition perception is slightly higher among males on '*there is enough competition in Qatar for telecom products and services in Qatar'* compared to females (see **Table 73**). Further, perceptions on easiness to make comparisons among offers and availability of technologically advanced products and services by local providers are also rate higher by males compared to females.

Table 73: Market Competitiveness – By Gender

Market Competitiveness	Overall	Male	Female
There Is Enough Competition in Qatar For Telecom Products and Services for Consumers	50	52	49
There Is A Good Choice of Products And/or Services Available to Me	58	58	58
There Is Sufficient Difference between the Products and Services Offered by Same Service Provider and By Different Service Providers	58	58	57
It Is Easy to Make Comparison Between Different Offers by Same Service Provider as well as From Across Different Service Providers	61	64	57
The Service Providers in Qatar Are Technologically Advanced in Terms of Products and Services	77	80	78

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362

Figures above represent proportion (%) of customers satisfied

4.18. Perceptions on Communications Regulatory Authority (CRA) role and mandate

The Communication Regulatory Authority was established with the main objective of regulating the communications sector in Qatar.

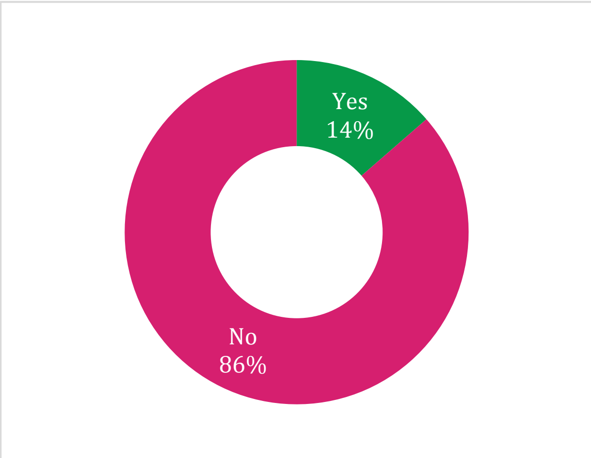
As the telecom regulator in the State of Qatar, CRA's mandate is to:

- 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 customers from misleading and unfair practices
- Manage a dispute resolution system that is transparent, fair, speedy, and effective

To achieve the objectives of CRA, one of the key requirements is to understand the awareness of CRA among the general customers, which was addressed in the survey.

As per the survey results, the overall awareness of the CRA among customers is 14% (see **Figure 58**) which is lower than 19% awareness in 2014 suggesting that awareness has declined among the general customers. However, the quality of awareness is in different trend. A significant decrease in percentage of customers who have just heard of the name of CRA but are not aware of the activities of CRA (from 41% in Customer Satisfaction Survey 2014 to 14% in 2018) suggests that the role of CRA is becoming clearer among the customers who are aware of CRA (see **Figure 59**).

Figure 58: Customers awareness of the CRA[12]

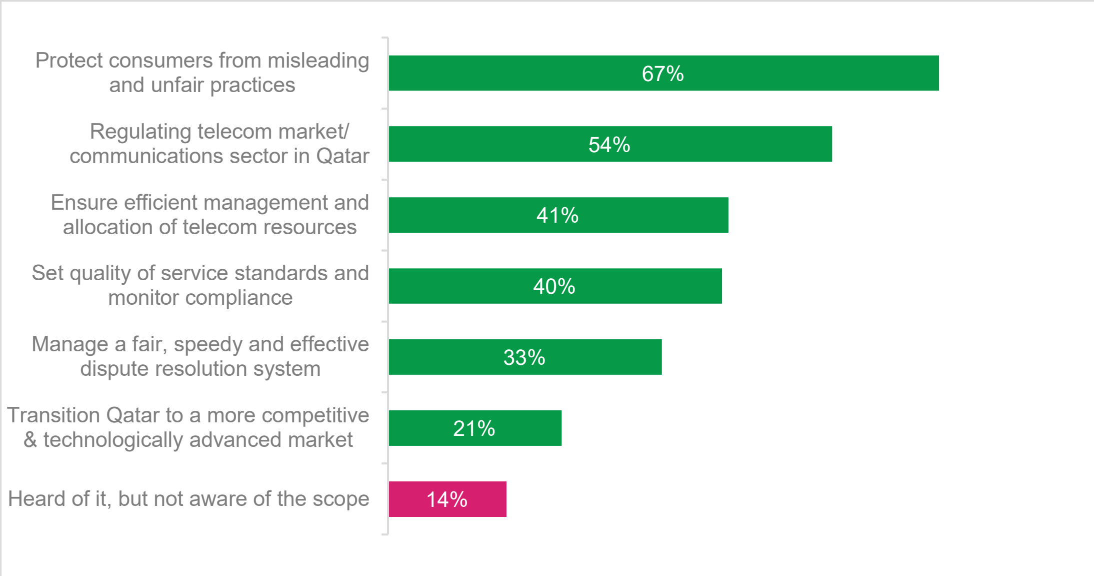


Source: Customer Satisfaction Survey 2018; Overall population n=2362

The chart below suggests that most of the customers aware of the CRA, understand the scope of CRA's role and functions. The majority of respondents (67%) have identified consumer protection among other recognized core CRA functions.

[12] Awareness measured as response to this question: Have you heard of an organization called Communications Regulatory Authority or CRA in Qatar?

Figure 59: Awareness of Scope of CRA responsibilities among consumers



Source: Customer Satisfaction Survey 2018; Overall population n=2362
Question specifically asked to those who are aware of CRA (n=342)

As per the survey, the customers do have many suggestions for CRA to improve the telecom services in Qatar. These suggestions include a wide range of topics including need for improved quality of services and better prices, improving competition and allowing for OTT services to work in Qatar.

> *"I have only one suggestion they have to improve and taking some action for connection price and promotion. Here is 2 telecommunication company but voice call and internet rate are very high, so I think CRA can concentrate this matter."* **(Arab male, 35-45 years)**

> *"I have only one suggestion as I know CRA can control telecommunication service market, so they should focus on high price of call and data rate. Cyber security solution and digital transformation. I think these two areas should be improved."* **(Western Male, 25-34 years)**

> *"if possible, as soon as possible build up more telecommunication market service so people can get more options to choose which is the best service. I think they should be concerned about the network quality because few didn't get proper network signal."* **(Expat Asian Male, 35-45 years)**

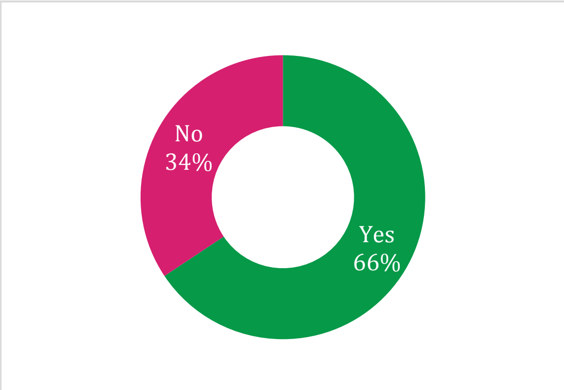
> *"Transparency and lower cost. Both Ooredoo and Vodafone should be more transparent with the actual consumption of internet data and mobile data"* **(Expat Far East Asian Male, 25-34 years)**

4.19. Satisfaction with Postal Services

Part of the CRA mandate is to regulate the postal services in Qatar. The postal services in the scope include QPost, courier service providers and includes local, international, parcel services, individual PO Box, express mail etc. The following report section presents the report findings on the satisfaction with postal services.

The research reveals that 66% of the customers have used any form of postal service from Q Post or courier services in Qatar (see **Figure 60**).

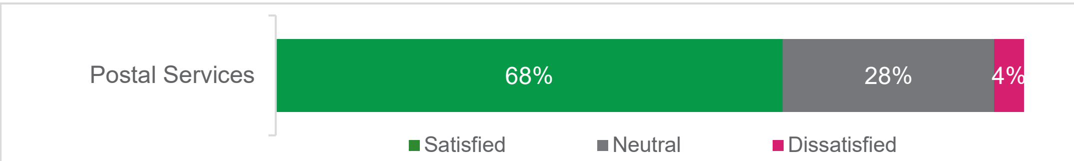
Figure 60: Availed Postal Services



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362
Note: Numbers may not add up to 100 percent due to rounding off

Overall, customers are satisfied with postal services, with 3 out 5 customers expressing satisfaction with postal services. The share of people dissatisfied is 4%.

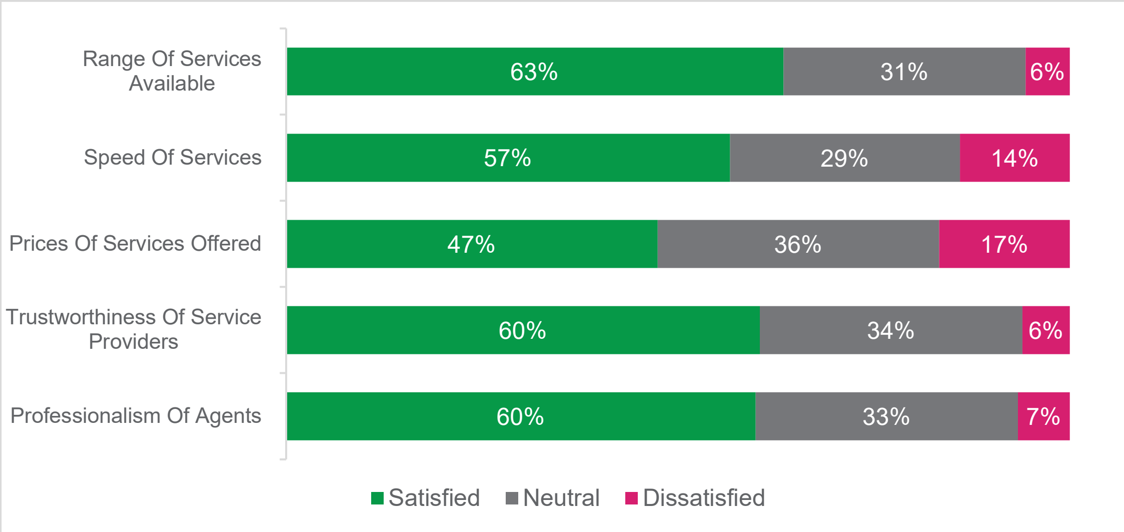
Figure 61: Satisfaction with Postal Services



Source: Customer Satisfaction Survey 2018; Overall Sample n=2362 (Those who availed service n= 1559)
Note: Numbers may not add up to 100 percent due to rounding off

Across services, the satisfaction is highest for range of services (63%), followed by trustworthiness of service providers (60%) and professionalism of agents (60%). The satisfaction with prices of services offered is lower with only 47% of the customers satisfied on this aspect. Further, there is considerable proportion of customers (17%) who are dissatisfied with the prices for different postal services.

Figure 62: Satisfaction on Postal Services Parameters



Source: Customer Satisfaction Survey 2018; Overall Sample n=1559

5. STRENGTHS AND IMPROVEMENT AREAS

The customer satisfaction survey has provided some key insights into the strengths and weakness of Qatar communication services from customers' point of view. The following criteria was used to arrive at the strengths and weakness for each of the product line.

Services with less than 5% dissatisfaction:	**Excellent**
Services with 6% to 10% dissatisfaction:	**Acceptable (Maintain status quo)**
Services with 11% to 15% dissatisfaction:	**Need minor intervention by the Regulator**
Services with more than 15% dissatisfaction:	**Need significant intervention by Regulator**

The following tables outline the leveraging strengths and the key improvement areas

Table 74: Key Leveraging Strengths

Product	Overall Experience Area	Customer Interaction Aspect
Mobile Voice	Quality of Strength	• Overall QoS experience
	Network	• Network Coverage
	Provisioning	• Ease of activation • Time taken for activation
	Recharging	• Adequacy of recharge • Accuracy of recharge • Range of recharge options • Ease of recharge
	Billing	• Regularity of receiving bills • Accuracy of bills • Options to make payments
Mobile Internet	Quality of Strength	• Overall QoS experience
	Network	• Network Coverage
	Provisioning	• Ease of activation • Time taken for activation
		•
Fixed Voice	Quality of Strength	• Overall QoS experience
	Network	• Voice Quality and Clarity • Geographical availability
	Provisioning	• Ease of activation • Time taken for activation
	Billing	• Regularity of receiving bills • Accuracy of bills • Options to make payments
		•
Fixed Internet	Quality of Service	• Overall QoS
	Network	• Speed of data services • Geographical availability
	Billing	• Regularity of receiving bills • Options to make payments

Table 75: Key Improvement Areas

Product	Overall Experience Area	Customer Interaction Aspect
Mobile Voice	Price Perception	• Local Call Charges
	Rate Plan and Tariff	• Clear Terms and Conditions • Transparency of prices
	Retail Facilities	• Adequacy of stores • Ease of access to retail stores • Knowledge of Personnel at retail facilities • Ability of personnel to resolve queries or issues at retail facilities
	Complaint Resolution	• Ease of contacting service provider • Adequacy of channels for raising complaints • Responsiveness of service provider • Duration to resolve complaints
	Value Perception	• Overall Value Perception
Mobile Internet	Network	• Video access or streaming quality
	Price Perception	• Mobile data charge: In-package • Mobile data charge: Off- package
	Rate Plan and Tariff	• Clear Terms and Conditions • Transparency of prices
	Complaint Resolution	• Ease of contacting service provider • Adequacy of channels for raising complaints • Responsiveness of service provider • Duration to resolve complaints
	Value Perception	• Value Perception
Fixed Voice	Price Perception	• Overall price perception • Initial Purchase and installation cost • Monthly rental
Fixed Internet	Price Perception	• Overall price perception • Initial Purchase and installation cost • Monthly rental
	Rate Plan and Tariff	• Clear Terms and Conditions • Variety of Rate plans
	Retail Facilities	• Ease of access to retail stores • Knowledge of Personnel at retail facilities • Ability of personnel to resolve queries or issues at retail facilities
	Complaint Resolution	• Ease of contacting service provider • Adequacy of channels for raising complaints • Responsiveness of service provider • Duration to resolve complaints
International Calling	Mobile Voice: Price and Packages	• Prices for International calling • Packages for International calling
	Mobile Internet: Price and Packages	• Prices for International data roaming • Packages for International data roaming

Roaming Services	Mobile Voice Roaming	• Overall satisfaction • Packages for roaming • Charges during roaming • Support to avoid bill shock
	Mobile Internet roaming	• Overall satisfaction • Packages for roaming • Charges during roaming • Support to avoid bill shock

6. KEY TAKEOUTS FOR CRA

Based on the mandate of CRA and the results of customers satisfaction survey, some key take-outs for CRA can be summarized:

Observations	What CRA can do/ facilitate
Market Competitiveness **Presently 50% of the customers believe that there is enough competition in the market for customer services. In addition, the overall agreement to the statement 'there is good choice of products available to organization' is at 58%. The agreement on ability to distinguish offers and make comparison between different offers is also limited**	• The competition in fixed services is limited at this point and this potentially induces the perception of lack of competition. CRA can explore the feasibility of multiple service providers for fixed services

Observations	What CRA can do/ facilitate
International Calling **More than 70% of the customers presently use OTT services for international calling. Further the satisfaction for international calling is low on prices and on the availability of suitable packages for international calling**	• CRA needs to ensure that International calling packages are widely available at different price points. • The packages for international calling should be competitively priced. • CRA can frequently publish and publicize the findings of pricing benchmarking study.

Observations	What CRA can do/ facilitate
International Roaming **Presently almost 25% of customers claim that they use roaming services for both voice and data**	• The awareness of bill shock introduced by the service operators can be improved.

services. The customer satisfaction with roaming services is low at an overall level and on parameters like packages for roaming, charges during roaming and on bill shock support.	• CRA can conduct a benchmarking exercise on roaming charges in the region and use the results to educate the customers on competitive pricing for roaming services

Observations	What CRA can do/ facilitate
Complaint Resolution **There is considerable dissatisfaction in terms of complaint resolution on parameters like ease of contacting service provider, responsiveness of service provider and duration to resolve a complaint.**	• CRA can reduce the time of auto escalation of complaints not resolved to CRA from the existing 30-day period. • Service providers to file a summary report of queries and complaints registered and resolved to CRA monthly

Observations	What CRA can do/ facilitate
CRA Awareness **The awareness on CRA is low at 14%, but quality of awareness has improved as compared to 2014.** **Further, the awareness of complaint escalation is also only 16%**	• The SP's also should be encouraged to have the onus to increase the awareness of CRA among customers. • CRA can ask service providers to include CRA contact details on monthly bills and service recharge vouchers to improve awareness.

7. APPENDIX I: RESEARCH DETAILS

A four-phase research design was adopted to generate insights into the market needs and drivers as well as validating the hypothesis through a large sample survey. The four phases were as follows:

- Exploratory phase (among CRA stakeholders and service providers)
- Secondary research phase (from credible sources)
- Qualitative phase (among customers)
- Quantitative phase (among customers)

7.1. Qualitatitive Phase

The following mini groups (consisting of 4 to 5 members) were conducted as part of the qualitative phase

Table 76: Mini focus Group Details

	Group 1	Group 2	Group 3	Group 4	Group 5
Location	Doha	Doha (Blue collared workers location)	Doha	Doha	Al Rayyan
Gender	Male	Male	Female	Female	Male
Nationality	Local Qatari	Expat Asians	Expat Asians	Local Qatari	Expat Arabs
Age	15 to 25	25+ to 35	25+ to 35	15 to 25	35+ to 45
Product/ Service Usage	Mobile (Voice + Data)	Mobile (Voice + Broadband)	Fixed (Voice + Broadband)	Mobile (Voice + Data)	Fixed (Voice + Broadband)
Number of participants	4	5	4	5	5

Table 77:Mini focus Group Details -2

	Group 6	Group 7	Group 8	Group 9	Group 10
Location	Al Rayyan	Al Wakra	Al Wakra	Al Khor	Al Khor
Gender	Female	Male	Male	Female	Male
Nationality	Expat Arabs	Expat Westerners	Local Qatari	Local Qatari	Expat Asians
Age	25+ to 35	25+ to 35	35+ to 55	35+ to 55	35+ to 55
Product/ Service Usage	Mobile (Voice + Data)	Mobile (Voice + Data)	Fixed (Voice + Broadband)	Mobile (Voice + Data)	Mobile (Voice + Data)
Number of participants	5	4	5	5	4

7.2. Quantitative Phase

In the quantitative phase, 2362 customers were interviewed to understand their experience with communication services in Qatar. The customers were spread across different demographics to have a fair representation of the population of Qatar. The details of the customers interviewed are as follows

Table 78: Sample Distribution- By Type of Population

Municipality	Sample Proportion	Sample
Mainstream	17%	1971
Transient	83%	391

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362

Table 79: Sample Distribution - By Nationality

Nationality	Sample Proportion	Sample
Qatari	13%	315
Non-Qatari	87%	2047

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362

Table 80: Sample Distribution - By Municipality

Municipality	Sample Proportion	Sample
Al Daayen	4%	106
Al Khor and Dhekra	9%	204
Al Rayyan	22%	515
Al Shamal	4%	105
Al Sheehaniya	9%	205
Al Wakrah	14%	321
Doha	34%	803
Umm Slal	4%	103

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362

Table 81: Sample Distribution - By Age

Age Range	Sample Proportion	Sample
15-24 years	15%	352
25-34 years	28%	667
35-44 years	30%	712
45-54 years	17%	394
Above 55 years	10%	237

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362

Table 82: Sample Distribution - By Gender

Gender	Sample Proportion	Sample
Male	72%	1710
Female	28%	652

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362

Table 83: Sample Distribution - By Profession

Profession	Sample Proportion	
Legislators, Senior Officials and Managers	5.2%	123
Professionals	9.2%	217
Technicians and Associate Professionals- mechanics, commercial artists and designers	2.3%	54
Clerks- typists clerks, book-keepers, accountants, telephonists, bank employees, cashiers, lower grade civil servants	6.8%	161
Service Workers and Shop and Market Sales Workers	5.6%	133
Skilled Agricultural and Fishery Workers	2.4%	56
Craft and Related Trades Workers	14.4%	341
Plant and Machine Operators and Assemblers	7.3%	172
Elementary Occupations- Watchmen, night guards, door keepers, messengers, office boys, street vendors, farmhands, unskilled workers, servants/ maids, unemployed	26.5%	625
Seeking work for the first time	3.1%	73
Unemployed with previous employment	3.1%	73
Student	4.9%	116
Housewife	6.7%	159
Retired	2.2%	52
Not Working due to disability	0.0%	
Not working	0.3%	7

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362

Table 84: Sample Distribution - By Education

Education	Sample Proportion	Sample
Illiterate	4%	84
Read and Write	7%	169
Primary	4%	87
Preparatory	7%	160
Secondary	26%	603
Pre- University Diploma	21%	485
University and above	33%	774

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362

Table 85: Sample Distribution - By Type of Service

Service	Overall Sample	Ooredoo	Vodafone

Mobile Voice	2332	1341	991
Mobile Internet	2172	1293	879
Fixed Voice	992	927	65
Fixed Internet	1138	1071	67

Source: Customer Satisfaction Survey 2018; Overall Sample n=2362

Weighting Approach

The sample was weighted to represent the proportion of the universe and the following weights were used for RIM Methodology. The parameters of municipality, gender and nationality were used for weighting for both mainstream and transient populations.

Table 86: Weighting Factors

Parameters	Mainstream Universe proportion	Transient Universe Proportion
Municipality		
Al Daayen	3.13%	1.68%
Al Khor and Dhekra	3.54%	11.65%
Al Rayyan	37.59%	16.92%
Al Shamal	0.43%	0.33%
Al Sheehaniya	2.51%	11.33%
Al Wakrah	8.33%	15.17%
Doha	39.20%	40.15%
Umm Slal	5.28%	2.77%
Gender		
Male	48.86%	93.36%
Female	51.14%	6.64%
Nationality		
Qatari	12.68%	
Non- Qatari	87.33%	100.00%

Source: Ministry of Transport and Communication

Target Group

Some of the key criteria for identifying eligible respondents were:

- USAGE: Should be an active user of communication service product (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)
- MULTIPLE PRODUCT USAGE: The customer has been interviewed for all the services that they are using.

Data Collection Instrument

Post the exploratory and qualitative phase, detailed discussions were held between CRA and Kantar 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 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 June 2018 to August 2018. 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.

8. TABLE OF TABLES

9. TABLE OF FIGURES