

Consumer Satisfaction Study 2022 – Survey Findings

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Executive Summary

The 'Consumer Satisfaction Survey 2022' presents the detailed findings of satisfaction among consumers in Qatar with their telecommunication service providers, Ooredoo Qatar Q.P.S.C and Vodafone Qatar P.Q.S.C. The findings are based on a nationally representative survey of 2,529 individuals of different demographics. This report marks the third wave of research conducted to measure satisfaction levels among consumers in Qatar across all facets of telecommunication services including network coverage, service value, rate plans and tariffs, billing and payment, customer service and complaint resolution. The summary of the survey findings is outlined below.

Usage of telecommunication services

Ooredoo Qatar Q.P.S.C holds the largest market share among the surveyed population of consumers with 54% reporting to be subscribed to Ooredoo Qatar Q.P.S.C services exclusively. Three in ten of the telecom services subscribers report to be exclusively serviced by Vodafone Qatar P.Q.S.C. Some 16% of the surveyed sample use the services of both service providers. Mobile services are the most used services with at least nine in ten consumers reporting to be using mobile voice and mobile internet services). In comparison, four in ten consumers report using fixed internet services and just one in ten consumers report using fixed voice. Most users of fixed services are customers of Ooredoo Qatar Q.P.S.C with at least eight in ten respondents reporting to use fixed services subscription from the service provider while only one in ten people are using Vodafone Qatar P.Q.S.C fixed services. For mobile services, six in ten surveyed users report their service provider is Ooredoo Qatar Q.P.S.C while four in ten users report their service provider is Vodafone Qatar P.Q.S.C. Over half of the mobile services users have a post-paid subscription.

Importance of telecommunication services

The most important telecommunication services according to consumers, in descending order, are mobile voice, mobile internet, fixed internet and fixed voice. 93% of the surveyed consumers rate mobile voice services as highly important and give a score of between '7' and '9' on a 9-point rating scale, followed by mobile internet services (88%) and fixed internet services (67%). Fixed voice services are the least important and the least used services in Qatar with only 28%

of the surveyed residents rating the importance of these services between '7' and '9'.

It is observed that the importance of fixed services has significantly declined since 2018, from 98% down to 67% for fixed internet services, and from 74% down to 28% for fixed voice services.

Overall satisfaction with telecommunication services

Overall satisfaction with telecommunication services among consumers in Qatar is relatively high with 79% of the respondents rating their overall satisfaction between '8' and '10' on a 11-points scale. The findings show strong results for the level of satisfaction across all service categories. Voice services, including mobile and fixed, report to have the highest levels of customer satisfaction (82% and 83% respectively). Overall satisfaction is slightly lower for Internet services but is still relatively high at 78% for fixed internet and 74% for mobile internet. Given the higher usage rates and level of importance placed on mobile internet services, consumers most likely expect a higher service standard.

Customers' intention to recommend telecommunication services

Users of fixed voice services are the most likely among the surveyed consumers to recommend the services they use with 61% of them reporting a rate of '9' or '10' on a recommendation scale of '0 to 10'. Although the proportion of promoters (those who provided a rate of 9 or 10) is relatively high for all telecom services, mobile internet services report the lowest percentage of 44%.

Customer experience with telecommunication network

At least eight in ten customers of fixed services are highly satisfied with the following parameters: availability of services (voice 86%; internet 83%) and quality and clarity of fixed voice services (80%). And at least eight in ten customers of mobile services are highly satisfied with the network coverage of mobile voice services. Overall, telecom consumers in Qatar are slightly more satisfied with the telecommunication network of voice services compared to internet services. For the internet, fixed services seem to be more satisfying than mobile services in terms of internet speed and quality of video access and streaming.

Customers' value perceptions

The surveyed customers were asked about their value perceptions regarding different aspects of telecommunication services. Overall, the value perceptions of telecommunication services are considered average among consumers in Qatar with most aspects of telecommunication

services being rated as 'good value' by less than two thirds of respondents. However, on the overall level, 70% of consumers of fixed services seem to be highly satisfied with the prices and costs of the available fixed services compared to 59% for consumers of mobile services.

International calls via fixed voice and mobile voice, international roaming charges via mobile voice and mobile internet, and data charges via fixed internet and mobile internet (both in and off-package) record the lowest value perceptions among the surveyed sample with less than half of the users rating these services as 'good value'.

Customers' perceptions on rate plans / tariffs

Consumers in Qatar generally have higher satisfaction levels with the rate plans and tariffs associated with fixed services when compared to mobile services. However, at least seven out of ten customers are highly satisfied with all parameters related to rate plans and tariffs, with an exception for the transparency of prices and variety of rate plans offered for mobile internet services (with a satisfaction score of 68% for each). Overall, 76% of customers using fixed services rate their satisfaction with the variety of packages available as '8' or '9' or '10' on a scale of '0 to 10', compared to a proportion of 71% for the users of mobile services.

Tariffs information

Awareness that telecommunication service providers are required to publish their tariffs is low among telecom customers in Qatar with just over a third of surveyed consumers (36%) reporting to be aware that service providers are required to publish tariffs through multiple communication channels including online platforms and newspapers. The surveyed users of telecom services prefer to receive information about tariffs mostly via advertisements (62%), a link to published tariff sent as SMS periodically (46%), publishing via social media accounts of service providers (35%), and at retail stores (35%).

Customers' perceptions on provisioning

Overall, satisfaction levels are high among the surveyed consumers with the initial stages of purchasing telecommunication services. However, the level of satisfaction is slightly higher for fixed services when compared to mobile services. A high 82% of users are satisfied with the ease of purchasing fixed voice services and 80% for fixed internet compared to 78% for mobile voice and 76% for mobile internet.

Satisfaction levels are also higher for the time taken to activate fixed internet services when compared to mobile internet services (85% vs 78% respectively). Satisfaction is also higher in

terms of the time taken for the fixed services to be activated compared to the mobile services.

Customers' Perceptions on Recharge, Billing and Payment

Users of mobile voice and mobile internet prepaid services were asked to rate their satisfaction with different parameters related to the recharge. Overall, among the surveyed sample, satisfaction scores are the highest for the adequacy of recharge options (77% for voice and 72% for internet). And in general, satisfaction scores are higher for mobile voice services across all parameters except for the validity of the recharge (57% for voice vs 58% for internet). The validity of recharge records the lowest satisfaction scores for both mobile voice and mobile internet services.

Most respondents prefer to receive their telecommunication bills via SMS (77%). Almost four in ten consumers prefer to receive bills via the service provider App and over a quarter of the respondents prefer to receive an email. There is a tendency for consumers to prefer online methods of bill payment with 64% of respondents indicating a preference to pay their bills through the service provider mobile App. 45% of respondents also mention preferring to pay their bills through the self-service machines, 42% of respondents also mention online payment through the service provider website or via bank transfer, while 32% mention payment at retail stores using cash, credit card or cheque.

Eight in ten users of mobile services are also highly satisfied with the regularity of receiving bills, ease of understanding the bills, and accuracy of the bills for internet services. Satisfaction with the accuracy of receiving bills for mobile voice services is slightly lower at 78%. For the users of fixed services, at least eight in ten are highly satisfied with the regularity of receiving internet bills and ease of understanding the internet bills.

Satisfaction with customer services

Over one out of five respondents (24%) report having dealt with the customer service team of their main service provider in the past three months. Satisfaction levels with the services provided by the customer service team are moderate with 68% of the respondents who contacted their service provider indicating a satisfaction rate of '8' to '10'. Six in ten respondents confirm having contacted the customers services through a phone call to the call center of their main service provider while 47% have visited a retail store.

Among customers who called the service provider call center, 67% report they were generally satisfied with the quality of services they have received. Staff being friendly and courteous receive the highest satisfaction score of 73%. Providing customers with helpful information and

listening to their needs follows behind at 68% and 67% respectively. The lowest satisfaction score is recorded for the timeliness to respond to their call at 53%.

Among customers who visited the service provider retail store, 75% report they were generally satisfied with the quality of services they have received from the retail store. Staff being friendly and courteous again receive the highest satisfaction level of 78%. Providing customers with helpful information and attending to their enquiry follows behind at 77% and 74% respectively. The lowest satisfaction score is recorded for the waiting time at the retail store to access the personnel at 53%.

Complaint resolution mechanism

Only 10% of the surveyed consumers have made a complaint to their telecommunication service provider in the past twelve months. Most complaints were related to mobile services (42% mobile internet and 31% mobile voice), and to a lesser extent fixed services (25% fixed internet and 2% fixed voice). Complaints related to mobile voice services were mostly about voice quality and clarity (25%), billing (23%), disconnection (21%), and network coverage (21%). Complaints related to mobile internet services were mostly about network coverage (44%), disconnection (28%), and billing (24%). Disconnection (44%) and network coverage (36%) are the main reasons as to why users of fixed internet services registered a complaint with their telecommunication service provider. Overall, customers who made a complaint to their service provider have moderate satisfaction with the complaint resolution process. The highest satisfaction score is recorded for the friendliness of the person they had been in contact with, whilst the lowest satisfaction score is recorded for the time taken to resolve the issue.

Perceptions on the Communications Regulatory Authority

Awareness of the Communications Regularly Authority (CRA) is low among telecom consumers in Qatar with only a quarter of respondents being aware of the CRA when prompted. Awareness levels are highest for the CRA's role in protecting consumers from misleading and unfair practices and managing the complaint escalation process (68% and 66% aware respectively). Six in ten respondents who are also aware of the CRA are also aware of the CRA's roles of setting the quality-of-service standards and monitoring compliance (61%), ensuring Qatar has a competitive and technologically advanced telecommunications market (61%), ensuring the efficient management and allocation of telecommunication resources (60%), and regulating the telecommunications market and communications sector in Qatar (60%).

Escalation of complaints to the CRA is low among the surveyed sample as only 2% of

respondents aware of the CRA complaint escalation process report to have raised a complaint to the CRA.

Consumer rights protection

In general, the surveyed respondents do not feel that telecommunication service providers in Qatar are misleading in their advertising and promotions with only 9% of them claiming that the telecom service providers have misleading advertisements. Half of the respondents who believe there are misleading advertisements about telecommunication services state that those belong to Ooredoo Qatar Q.P.S.C. In comparison, 18% of respondents state that the misleading advertisements they are aware of belong to Vodafone Qatar P.Q.S.C and 31% believe that both service providers have misleading advertisements.

Respondents were asked how satisfied they were with factors related to telecommunication advertising. 70% of respondents indicate a score of '8' to '10' with the clarity of advertising and communication, 67% of respondents record a score of '8' to '10' with the ability to opt out of promotional messages from service providers, and 64% of respondents indicate a score of '8' to '10' with reduced spamming and unwanted promotions.

Market competitiveness

Over half of the respondents (51%) believe there is enough competition in Qatar for telecommunication products and services for consumers and there is a good choice of products and/or services available to them. Most respondents haven't switched from one service provider to another (95%). However, among the 5% of the respondents who have effectively switched service providers, most indicate that the main reason was because of high prices and charges (32%) and offers/packages in general (25%).

In Qatar, telecom consumers are more aware of the mobile number portability than fixed number portability (68% vs 50% respectively). Only 7% of respondents who are aware of the mobile number portability have used the service versus 2% for the fixed number portability. Overall, 74% of those who used the mobile number portability service report to be highly satisfied (rate of '8-10'), compared to 67% for users of fixed number portability service.

Changes due to Covid-19

Respondents were asked if they had noticed any changes in telecommunication services due to the Coronavirus pandemic. Only 12% of them state they noticed changes, mainly related to the

network, variety and range of offers, prices and promotions, quality of internet services, and increase in usage of mobile services and internet services in general. Half of respondents (52%) of respondents believe that the overall performance of the service providers during the pandemic was either good or excellent.

Only 13% of respondents state they have changed their usage habits in terms of telecommunication services due to the pandemic. The changes they have experienced are mostly related to an increase in usage of telecom services both internet and voice.

Over a quarter of the respondents claim that the quality of the mobile services improved since Covid-19 (30% voice; 26% internet) while 21% of respondents believe the quality of fixed internet services has improved versus 17% for fixed voice services. Overall, most respondents believe the quality of the telecommunication services has remained the same as before the pandemic. This is also the case for the value for money of telecommunication services that most respondents believe has also remained the same.

1. Research Background

The Communications Regulatory Authority (CRA) was established by the Emiri Decree no. 42 of 2014 in order to regulate the communications and information technology and the postal sectors, as well as access to digital media, with the aim of providing advanced and reliable telecommunication services across the state. CRA uses its full range of regulatory powers to ensure that competition in the communications sector thrives and consumer rights are protected. The Consumer Affairs Department of the CRA carries out regular monitoring of consumer satisfaction with the two licensed Service Providers, Ooredoo Qatar Q.P.S.C and Vodafone Qatar P.Q.S.C. The CRA conducted a Consumer Satisfaction Survey in 2014 as the baseline measure for the level of satisfaction among consumers with their telecom service providers. A second wave of the survey has been conducted in 2018 to measure shifts in satisfaction with telecommunication providers. In 2022, the CRA conducted the Consumer Satisfaction Survey for the third time. The study involved qualitative and quantitative research that included focus group discussions and a nationally representative satisfaction survey with consumers of telecom services in Qatar. Secondary research was also conducted to provide regional and international benchmarking relating to the performance of telecommunication services and service providers.

1.1 Research methodology

In order to address the desired information outputs, the research approach involved three key components: (1) Benchmark Study; (2) Consumer Insights; and (3) Consumer Satisfaction Survey.

- **Benchmark Study:** this phase involved secondary research to provide the CRA with regional and international benchmarking and comparative data and indicators relating to the performance of telecommunication carriers and carriage service providers, including consumer satisfaction, consumer benefits and quality of service. The findings from the benchmark study were presented in a separate report titled 'Consumer Satisfaction Benchmark Report'. The report provides an overview of the telecommunications ecosystem in Qatar and identifies gaps in service delivery that may impact customer satisfaction with the service providers. The report benchmarks Qatar against six economies including neighboring countries Bahrain and the United Arab Emirates (UAE), as well as leading telecommunication markets Australia, Singapore, Netherlands, and the United Kingdom of Great Britain and Northern Ireland (UK).
- **Consumer Insights:** this component involved qualitative research consisting of ten mini

focus group discussions among consumers to gain insights into their attitudes towards telecommunication service providers and to further understand the customer service experience. The findings from the qualitative research were presented in a separate report titled 'Consumer Satisfaction Study - Qualitative Report'.

- **Consumer Satisfaction Survey:** this phase consisted of a nationally representative survey of 2,529 consumers of telecommunication services in Qatar. The research measured consumers' satisfaction with the following service and product delivery aspects:
 - Sales and Marketing of telecom services
 - Ordering and installation experiences
 - Customer Service and support experience
 - Customer registration experience
 - Retail/Service Center Experience
 - Complaints-handling experience
 - Billing experiences
 - Prices
 - Levels of competition and the impact of competition on service delivery
 - The impact of social media on customer service
 - Bundling of Services and Packaged services
 - Fault restoration, connection of services and the introduction of fiber.
 - Mobile number portability (MNP) where applicable.
 - Fixed number portability (FNP) where applicable.
 - Modes of service interface from advertising and promotions, via point of sale up until delivery of service.

The survey also aimed to measure the consumers' awareness of the CRA and to identify the usage and preferences in terms of products and services available before and after the Covid-19 pandemic.

The survey was conducted using a computer assisted personal interview (CAPI) method of surveying. The data was collected through a questionnaire with an average length of 30 minutes. The questionnaire was developed, translated, scripted, and tested in English and Arabic by the research team prior to fieldwork launch. Sampling quotas were applied by demographic criteria including gender, age group, municipality, and nationality to ensure a nationally representative study of individual consumers in Qatar.

The consumers' satisfaction was measured across the various categories of fixed and mobile

services as outlined below:

International Calls	Mobile Voice	Mobile Internet
Means of use (fixed, mobile)	Importance of the service	Importance of the service
Importance of the service	Voice quality satisfaction	Speed
Quality of service	Network coverage	Service quality satisfaction
satisfaction level	Customer service	Services offered
Customer overall service	satisfaction	Easiness of use
satisfaction	Dropped Call rate	Customer service
Price satisfaction	Price satisfaction	satisfaction
Level of satisfaction with	Level of satisfaction with	Price satisfaction
competition.	competition	Level of satisfaction with
		competition
Fixed Voice	Fixed Internet	Roaming Services
Importance of the service	Importance of the service	Importance of the service
Speed	Throughput quality	Voice quality satisfaction
Service quality satisfaction	satisfaction	Customer service
Services offered	Services offered	satisfaction
Easiness of use	Easiness of use	Impact of Bill shock
Customer service	Price satisfaction	Price satisfaction
satisfaction	Level of satisfaction with	Level of satisfaction with
Price satisfaction	competition	competition
Level of satisfaction with	Customer service	Billing experience
competition	satisfaction	

The detailed methodology for the Consumer Satisfaction Survey is presented in the Appendix of this report.

1.2 Report outline

This report presents the detailed findings from the third component of the study, the 'Consumer Satisfaction Survey'. The findings of the study are organized into three main sections as outlined below:

- **Qatar demographic and telecommunications market outlook:** this section of the report

presents an overview of the Qatar population and telecommunications market.

- **Customers' perceptions on telecommunication services in Qatar:** this section of the report presents the findings related to telecommunication services including usage; level of importance placed on services; value perceptions; satisfaction with services such as the network, tariffs, purchasing/activation, billing, payment, customer services, complaint resolution and overall satisfaction. This section also reports on awareness of consumer rights protection, market competitiveness among individual consumers, awareness of the CRA and its roles, and changes in usage behaviors due to the Coronavirus pandemic.
- **Key takeaways for CRA:** this section of the report presents the observations based on the survey findings including the strengths and improvement areas for the telecommunications market in Qatar.

2. Qatar Demographic and Telecommunications Market Outlook

2.1 Qatar demographic outlook

When compared to the six selected benchmarked countries in the “Benchmark Study” component of the research, Qatar is ranked second on Gross Domestic Product (GDP) per capita (expressed in current international dollars converted by purchasing power parity conversion factor) according to the World Development Indicators database of the World Bank, with a value of \$ 102,018.1¹.

In terms of population, the latest national census (2020) shows that more than 2,846 million people live in Qatar with 84% of them aged above 14 years old. Over 46% of the total population are aged between 25 and 39 years old. Qatar’s population includes mostly non-Qatari residents whereas Qatari nationals constitute only 9% of it. The proportion of males is also considerably higher than females in Qatar’s population (71% vs 29%, respectively). The demographic profile of Qatar’s population is very important to understand the usage behaviors and perceptions of ICT and Telecommunications services.

2.2 Telecommunications market in Qatar

Overview of the telecommunication market in Qatar:

Backed by its 2020 budget of QR210bn (\$60bn), Qatar has one of the highest ICT spending in the MEA region². Qatar has one of the highest internet penetrations in the world and is ranked among the leading countries in terms of ICT adoption. The ICT sector is currently estimated to be worth \$4.4 billion and is expected to grow rapidly in the future³. ICT spending in Qatar is set to grow at a compound annual growth rate (CAGR) of 9.2% during the period 2019-2024, to reach US\$9bn by 2024⁴.

As per the latest ITU Data on Fixed-telephone subscriptions, 16% of Qatar’s population are users of landlines which is very low compared to 132% for users of mobile telephones (with some people using more than one cellular). In 2021, Qatar counted over 144 mobile-cellular

¹ <https://data.worldbank.org/indicator/NY.GDP.PCAP.PP.CD?view=chart>

² [Qatar among highest ICT spending in MEA region, says QFC chief \(gulf-times.com\)](#)

³ [Qatar Information and Communications Technology Sector \(trade.gov\)](#)

⁴ [ICT spending in Qatar will reach US\\$9bn in 2024 - GlobalData](#)

subscriptions per 100 inhabitants. The proportion of broadband subscribers was also higher for mobile compared to fixed wired services (120% vs 10%, respectively)⁵.

Key stakeholders and service providers:

With two service providers currently operating, the telecom market in Qatar is characterized by its duopoly with the Communications Regulatory Authority (CRA) as the market regulator. The three key stakeholders include Ooredoo Qatar Q.P.S.C, Vodafone Qatar P.Q.S.C, and the CRA. Ooredoo Qatar Q.P.S.C, formerly Qtel, was founded in Doha in 1987 initially as a telephone exchange company. The Qtel Group and all its operating companies worldwide were officially unified under Ooredoo Group in February 2013, as part of the company's strategy to combine its assets to form a global business within the telecommunications industry. Ooredoo now operates across the Middle East, North Africa and Southeast Asia and is one of the world's largest mobile telecommunications companies⁶. Ooredoo Qatar Q.P.S.C offers its customers a large range of mobile and fixed services for voice and internet services.

Vodafone Qatar P.Q.S.C officially commenced commercial operations on 1st March 2009⁷. The service provider has grown to serve more than 1.7 million customers in 2021. In the past two years, the company has expanded its network infrastructure to cover key locations in Qatar with fiber connectivity and 5G⁸.

As Qatar's independent communications regulator, the CRA strives to balance the obligations of telecommunication service providers with the rights of consumers, and to ensure the benefits of competition are passed on to consumers. The CRA's mission is to foster sustainable competition to promote a fair marketplace and improve customer experience through the ubiquitous availability of smart, innovative, and high-quality services. The CRA is committed to ensure transparency and efficiency of the telecommunication consumer protection process in Qatar.

⁵ <https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx>

⁶ <https://ipfs.io/ipfs/QmXoyvizjW3WknFiJnKLwHCnL72vedxjQkDDP1mXWo6uco/wiki/Ooredoo.html>

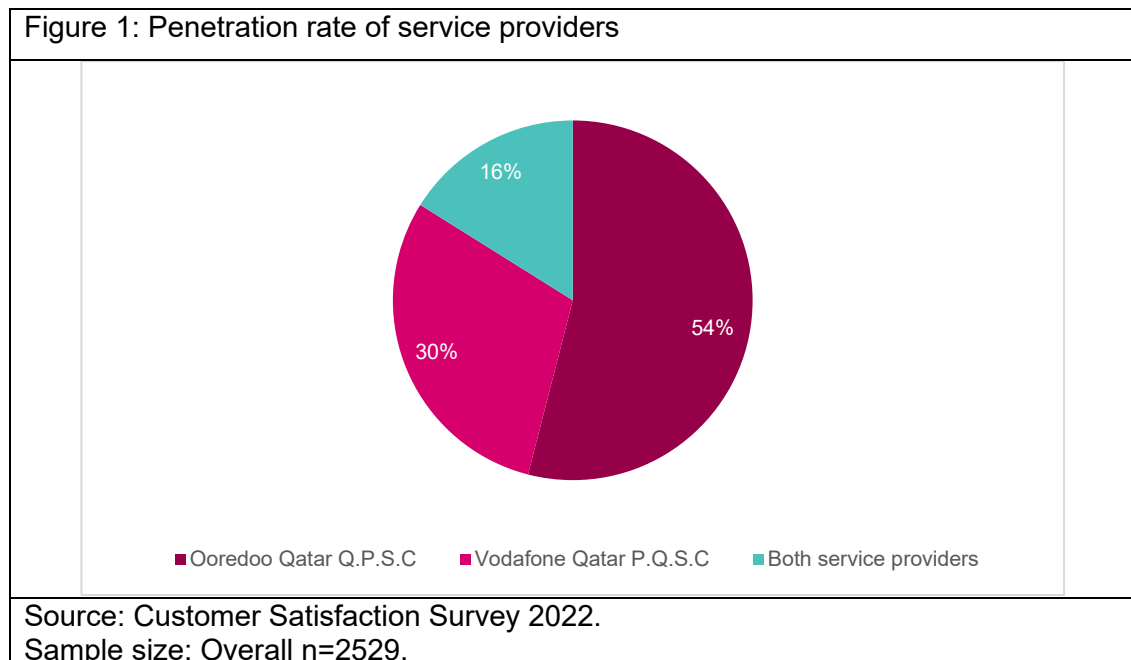
⁷ <https://en.wikipedia.org/wiki/Vodafone>

⁸ [Vodafone Qatar - The 25 Most Valuable Companies In Qatar- Forbes Lists \(forbesmiddleeast.com\)](https://www.forbes.com/lists/2021/01/middle-east-25-most-valuable-companies-in-qatar/)

3. Customers' Perceptions on Telecommunications Services in Qatar

3.1 Usage of telecommunication services

The Customer Satisfaction Survey results show that 54% of the surveyed sample are using the services of Ooredoo Qatar Q.P.S.C only while 30% use services from Vodafone Qatar P.Q.S.C only. Some 16% of the surveyed sample use the services of both service providers. See Figure 1.



Most females surveyed (70%) indicate using Ooredoo Qatar Q.P.S.C, and two in ten women use Vodafone Qatar P.Q.S.C' services. The penetration rate of service providers is somewhat more equally distributed among the males with 49% of them being exclusive customers of Ooredoo Qatar Q.P.S.C and 33% being exclusive customers of Vodafone Qatar P.Q.S.C. Three quarters of Qatari Nationals surveyed report using Ooredoo Qatar Q.P.S.C while only one in ten is using services from the service provider Vodafone Qatar P.Q.S.C. For the non-Qatari residents, 49% are users of Ooredoo Qatar Q.P.S.C' services and 35% are users of Vodafone Qatar P.Q.S.C. Males and non-Qataris residents are more likely than females and Qatari nationals to be customers of both service providers at the same time. See Tables 1 and 2.

Table 1: Penetration rate of service providers by gender			
	Results at the total sample level	Males	Females
Sample	2529	1897	632
Ooredoo Qatar Q.P.S.C	54%	49%	70%
Vodafone Qatar P.Q.S.C	30%	33%	20%
Both service providers	16%	18%	10%

Source: Customer Satisfaction Survey 2022.

Table 2: Penetration rate of service providers by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Sample	2529	506	2023
Ooredoo Qatar Q.P.S.C	54%	75%	49%
Vodafone Qatar P.Q.S.C	30%	10%	35%
Both service providers	16%	14%	17%

Source: Customer Satisfaction Survey 2022.

People aged below 25 years old are the most likely to be exclusive users of Ooredoo Qatar Q.P.S.C with a penetration rate of 65% while people aged between 25 and 34 years old are the most likely to be exclusive users of Vodafone Qatar P.Q.S.C with a penetration rate of 38%. Those aged between 45 and 54 years old are the most likely to be users of both service providers as almost a quarter of this segment report to use both Ooredoo Qatar Q.P.S.C and Vodafone Qatar P.Q.S.C. See Table 3.

Table 3: Penetration rate of service providers by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Sample	2529	326	926	776	351	150
Ooredoo Qatar Q.P.S.C	54%	65%	49%	53%	56%	61%
Vodafone Qatar P.Q.S.C	30%	29%	38%	27%	20%	20%
Both service providers	16%	5%	13%	20%	24%	19%

Source: Customer Satisfaction Survey 2022.

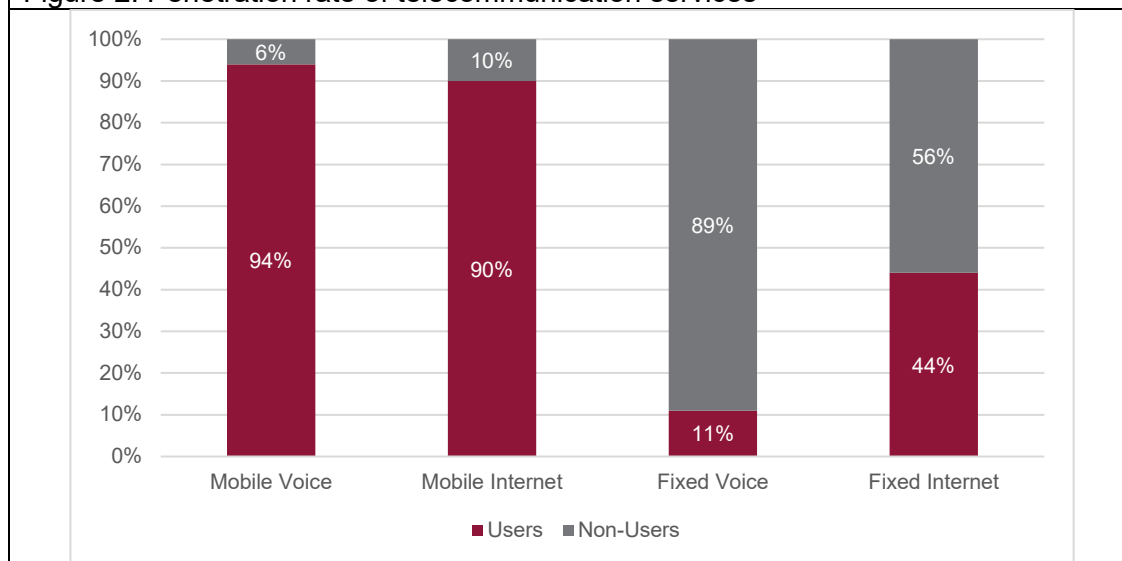
The penetration rate of Ooredoo Qatar Q.P.S.C is above average in the municipalities of Al Shamal (68%), Al Wakra (60%), Al Sheehaniya (59%), Doha (57%), and Umm Slal (56%). And the penetration rate of Vodafone Qatar P.Q.S.C is equal to or above average in Al Doha (33%), Al Rayyan (30%), Al Wakra (30%), and Al Sheehaniya (30%). Residents of Al Khor and Al Thakhira are the most likely among the surveyed sample to use both service providers at the same time. See Table 4.

Table 4: Penetration rate of service providers by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Sample	2529	1052	726	225	125	125	25	100	150
Ooredoo Qatar Q.P.S.C	54%	57%	49%	60%	56%	43%	68%	45%	59%
Vodafone Qatar P.Q.S.C	30%	33%	30%	30%	22%	15%	16%	25%	30%
Both service providers	16%	10%	21%	10%	22%	42%	16%	31%	11%

Source: Customer Satisfaction Survey 2022.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Overall, the majority of the surveyed sample use mobile services with 94% being users of mobile voice services and 90% being users of mobile internet services. In contrast, fewer people use fixed services with 44% being users of fixed internet services and only 11% being users of fixed voice services. See Figure 2.

Figure 2: Penetration rate of telecommunication services



Source: Customer Satisfaction Survey 2022.

Sample size: Overall n=2529.

Among the surveyed sample, males are slightly more likely than females to use mobile voice and fixed internet services, whilst females are more likely to use mobile internet and fixed voice services. Looking at the survey results by nationality, there is also a small difference in terms of usage of mobile services with Qatari nationals being more likely to use mobile internet and non-Qatari residents being more likely to use mobile voice services. However, the findings show a significant difference in the penetration rate for fixed services between Qataris and non-Qataris. Two thirds of the Qatari nationals surveyed report using fixed internet services compared to over a third for non-Qataris. And whilst almost three in ten Qataris are using fixed voice services, only 6% of the non-Qataris sample use this type of services. See Tables 5 and 6.

Table 5: Penetration rate of telecommunication services by gender			
	Results at the total sample level	Males	Females
Sample	2529	1897	632
Mobile Voice	94%	95%	91%
Mobile Internet	90%	89%	91%
Fixed Voice	11%	9%	16%
Fixed Internet	44%	44%	42%

Source: Customer Satisfaction Survey 2022.

	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Sample	2529	506	2023
Mobile Voice	94%	92%	94%
Mobile Internet	90%	96%	88%
Fixed Voice	11%	29%	6%
Fixed Internet	44%	67%	38%

Source: Customer Satisfaction Survey 2022.

Adults aged between 25 and 44 years old are the most likely than other aged groups to use mobile voice services while those aged 45-54 and 25-34 years old are slightly more likely to use mobile internet services. Although there are slight differences between the surveyed age groups for the penetration rate of mobile services as mentioned, the survey results show a more significant difference for the penetration rate of fixed services. In fact, the findings show that older adults aged 45 years old and above are the most likely to use fixed voice services and adults over 34 years old are more likely to use fixed internet services with the highest penetration rate for fixed internet being observed for age group 45-54 years at 58%. See Table 7.

	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Sample	2529	326	926	776	351	150
Mobile Voice	94%	91%	97%	97%	86%	79%
Mobile Internet	90%	87%	91%	88%	92%	89%
Fixed Voice	11%	10%	6%	10%	20%	26%
Fixed Internet	44%	33%	36%	50%	58%	49%

Source: Customer Satisfaction Survey 2022.

Penetration rate for mobile voice services is relatively high in all municipalities of Qatar except for Al Daayen which records the lowest penetration rate of 69%. Penetration rate for mobile internet services is also relatively high in all municipalities of Qatar with one exception which is

the municipality of Al Sheehaniya with a penetration rate of 63% for mobile internet services. Residents of Al Shamal and Al Daayen are the most likely to use fixed voice services with a penetration rate of 28%, whilst the residents of Al Sheehaniya, Doha and Al Rayyan are the least likely to use those services (8%, 9% and 9%, respectively). The municipalities of Al Shamal and Al Khor record the highest penetration rates for fixed internet services (84% and 72%, respectively). The municipalities of Al Daayen, Umm Slal, and Al Rayyan also record higher than average penetration rates for fixed internet services. See Table 8.

	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Sample	2529	1052	726	226	125	125	25	100	150
Mobile Voice	94%	96%	92%	95%	97%	95%	92%	69%	93%
Mobile Internet	90%	91%	89%	91%	95%	97%	96%	95%	63%
Fixed Voice	11%	9%	9%	11%	18%	11%	28%	28%	8%
Fixed Internet	44%	32%	52%	39%	61%	72%	84%	64%	31%

Source: Customer Satisfaction Survey 2022.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Penetration rate of telecommunication services slightly declined over the past four years for all services except for the fixed voice services which recorded a significant drop from 42% in 2018 down to 11% in 2022. The observed decline in the usage of telecommunication services in Qatar might be due to people becoming more likely to use over the top services such as social media apps.

Table 9: Penetration rate of telecommunication services, 2018 vs 2022		
	2018	2022
Sample	2362	2529
Mobile Voice	99%	94%
Mobile Internet	92%	90%
Fixed Voice	42%	11%
Fixed Internet	48%	44%

Source: Customer Satisfaction Survey 2018 and 2022.

Eight in ten users of fixed services are customers of Ooredoo Qatar Q.P.S.C while only a few are using Vodafone Qatar P.Q.S.C fixed services. For mobile services, six in ten surveyed users report their service provider is Ooredoo Qatar Q.P.S.C while four in ten users report their service provider is Vodafone Qatar P.Q.S.C (see Figure 3). Users of both service providers for mobile services were asked about how long they have been using the services. Most of them report having been using their main mobile voice and mobile internet services for over a year. See Table 10.

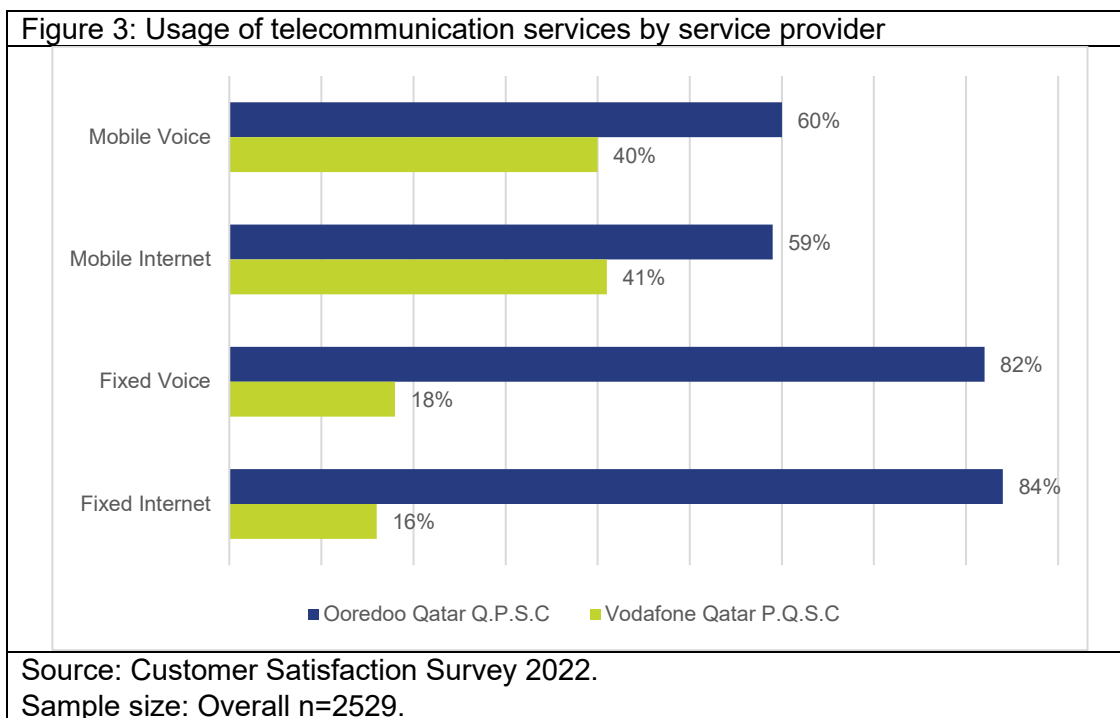


Table 10: Usage duration of main telecommunication services		
	Mobile Voice	Mobile Internet
Sample	136	75
Less than 3 months	2%	0%
3 to 6 months	4%	3%
6 to 12 months	9%	13%
More than 12 months	81%	76%
Not sure/ Don't know	5%	8%

Source: Customer Satisfaction Survey 2022.
Note: this question has been asked only to users of both service providers.

Users of mobile voice services were also asked how many mobile lines they personally use per service provider and per type of line (prepaid vs postpaid). The survey results show that the average number of mobile lines for each service provider is one line for prepaid services and one line for postpaid services. See Table 11.

Table 11: Average number of mobile connections/lines				
	Prepaid Ooredoo Qatar Q.P.S.C	Prepaid Vodafone Qatar P.Q.S.C	Post-paid Ooredoo Qatar Q.P.S.C	Post-paid Vodafone Qatar P.Q.S.C
Sample	939	644	904	590
Mobile Voice	1	1	1	1

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368.

Over half of the surveyed users of mobile voice services report using a post-paid line for their main mobile voice service while four in ten users confirm using a pre-paid line. Six in ten users of mobile internet services report that their main mobile internet services are post-paid while four in ten users use pre-paid services (see Figure 4). Overall, users of mobile services indicate spending an average amount of 275 QAR per month on their main mobile services whilst users of fixed services report spending an average amount of 467 QAR per month on their main fixed services. See Table 12.

Figure 4: Type of the primary mobile services

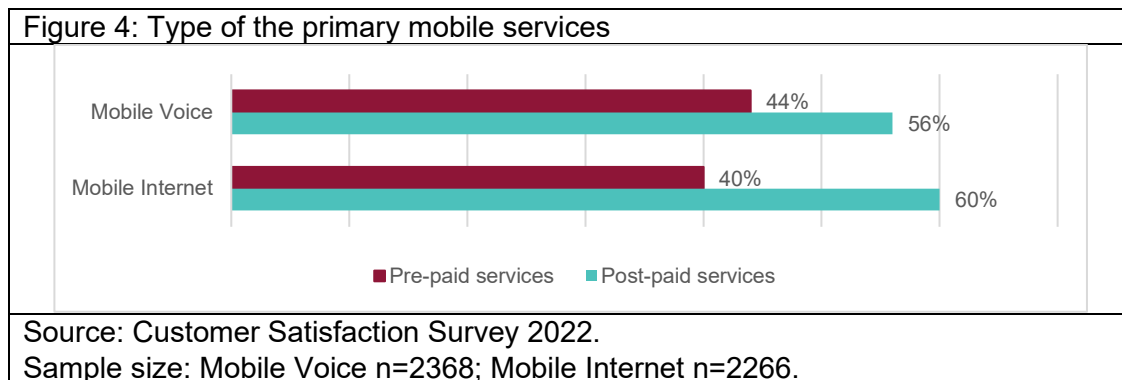


Table 12: Average monthly fees spent on telecommunication services

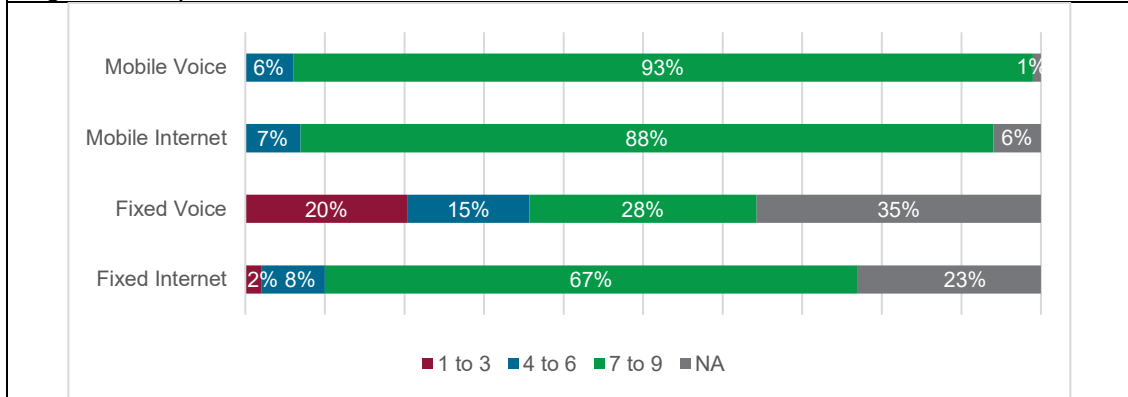
	Mobile Services	Fixed Services
Sample	2498	1111
Average amount spent monthly on main services	275 QAR	467 QAR

Source: Customer Satisfaction Survey 2022.

3.2 Importance of telecommunication services

The surveyed sample were asked to rate the importance level of each of the telecommunication services on a scale of '1 to 9' where '1' means 'not at all important' and '9' means 'extremely important'. For the analysis, the research team considers the answers of between '1 and 3' to be 'low importance', the answers between '4 and 6' to be of 'moderate importance' and the answers between '7 and 9' to be 'high importance'. Overall, mobile voice services are the most important telecom services for Qatar's residents with 93% of the surveyed sample rating the importance of these services between '7' and '9', followed by mobile internet services (88%) and fixed internet services (67%). Fixed voice services are the least important and the least used services in Qatar with only 28% of the surveyed residents rating the importance of these services between '7' and '9'. See Figure 5.

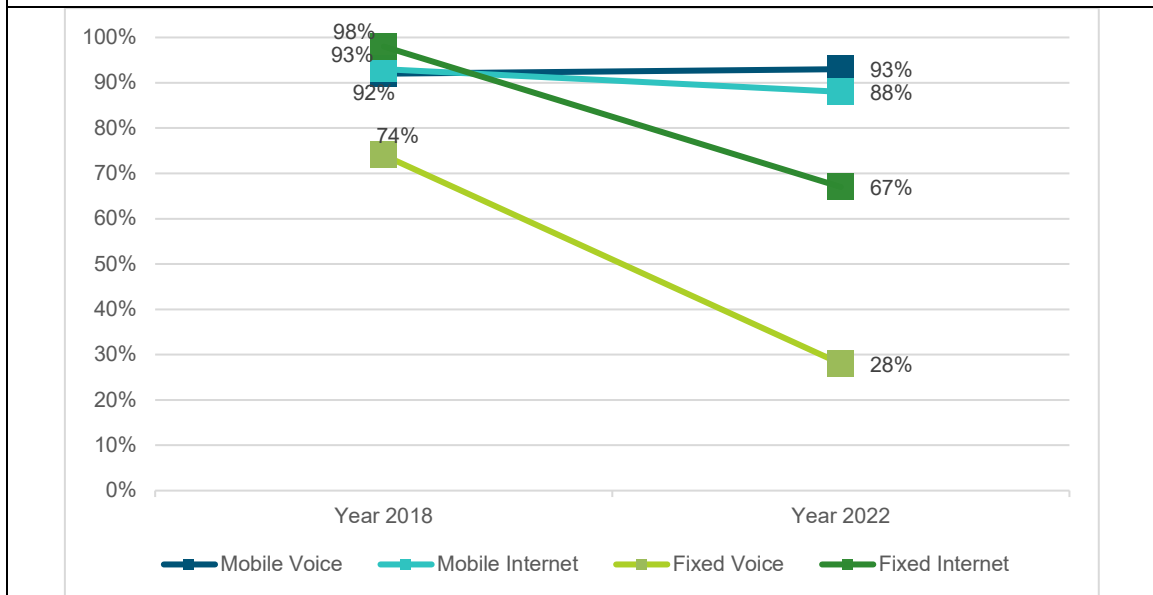
Figure 5: Importance of telecommunication services



Source: Customer Satisfaction Survey 2022.
Sample size: Overall n=2529.

Figure 6 shows the changes in importance levels for telecommunication services between 2018 and 2022. It is observed that the importance of fixed services has significantly declined since 2018, from 98% down to 67% for fixed internet services, and from 74% down to 28% for fixed voice services. The importance level of mobile internet services has also slightly declined from 93% in 2018 down to 88% in 2022. The importance of mobile voice services seems to be relatively stable through the years with a very slight incline in 2022 (from 92% in 2018 up to 93% in 2022).

Figure 6: Importance of telecommunication services: comparison between 2018 and 2022



Source: Customer Satisfaction Survey 2022.
Sample size: Overall n=2529 in 2022 and n=2362 in 2018.
Percentage of respondents who have rated the importance of the services from 7 to 9.

Female customers tend to give a higher importance to fixed services compared to males. Table 13 shows that 77% of the surveyed women rate fixed internet services as highly important and give a score of between '7' and '9' on a 9-point rating scale compared to 64% for males. And 38% of females report fixed voice services are highly important compared to 25% for males. However, the importance of mobile services seems to be high amongst both females and males. Overall, Qatari nationals are more likely to give higher importance rates than non-Qatari residents for all telecommunication services. As shown in Table 14 below, the proportion of Qatari nationals who give a score of between '7' and '9' for the importance of mobile services is slightly higher than for non-Qataris. But the wider difference in scores is observed for the fixed services as 92% of the Qataris sample believe the fixed internet services to be highly important compared to 61% for non-Qataris, and 47% of the Qataris report that fixed voice services are highly important compared to 24% for non-Qataris.

Table 13: Importance of telecommunication services by gender			
	Results at the total sample level	Males	Females
Sample	2529	1897	632
Mobile Voice	93%	93%	91%
Mobile Internet	88%	87%	89%
Fixed Voice	28%	25%	38%
Fixed Internet	67%	64%	77%

Source: Customer Satisfaction Survey 2022.
Percentage of respondents who have rated the importance of the services from 7 to 9.

Table 14: Importance of telecommunication services by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Sample	2529	506	2023
Mobile Voice	93%	96%	92%
Mobile Internet	88%	97%	85%
Fixed Voice	28%	47%	24%
Fixed Internet	67%	92%	61%

Source: Customer Satisfaction Survey 2022.

Percentage of respondents who have rated the importance of the services from 7 to 9.

Nine in ten surveyed customers aged 25 years and older rate the importance of mobile voice services between '7' and '9' compared to eight in ten people for the younger age group (15-24 years). For the mobile internet services, the scores are also high with people aged 45 years and above giving slightly higher importance ratings to these services compared to younger age groups. Overall, fixed voice services record the lowest importance rate for the age group 25-34 years whilst older age group (55 years and above) records the highest score. For the fixed internet services, the highest rate is recorded for the age group 45-54 years old (82%) whilst the lowest rate is recorded for the age group 25-34 years old (59%). See Table 15.

Table 15: Importance of telecommunication services by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Sample	2529	326	926	776	351	150
Mobile Voice	93%	86%	93%	95%	95%	91%
Mobile Internet	88%	86%	87%	86%	91%	92%
Fixed Voice	28%	30%	23%	24%	41%	53%
Fixed Internet	67%	68%	59%	68%	82%	78%

Source: Customer Satisfaction Survey 2022.
Percentage of respondents who have rated the importance of the services from 7 to 9.

The proportion of surveyed sample who consider mobile voice services as highly important with a rating of between '7' and '9' is very high in all municipalities. However, the highest scores are observed for the municipalities of Al Shamal, Al Daayen, Al Khor, and Umm Slal, while the lowest score is recorded for the municipality of Al Wakra. All surveyed residents of Al Daayen reported the mobile internet is a very important service for them while nine in ten residents of Umm Slal, Al Khor and Al Shamal also rate the importance of mobile internet services as highly important. Mobile internet services are less likely to be important for residents of Al Sheehaniya compared to other areas. Residents of Al Daayen record the highest importance rate for fixed voice services at 52%, while residents of Al Khor record the lowest rate of 18%. Fixed internet services seem to be highly important to majority of the resident of Al Daayen, Al Shamal, Al Khor, Umm Slal, Al Wakrah, and Al Rayyan while just over half of the residents of Doha and Al Sheehaniya report that fixed internet services are highly important to them. See Table 16.

Table 16: Importance of telecommunication services by municipality

	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Sample	2529	1052	726	226	125	125	25	100	150
Mobile Voice	93%	91%	92%	88%	98%	98%	100%	98%	95%
Mobile Internet	88%	89%	86%	85%	95%	97%	96%	100%	67%
Fixed Voice	28%	25%	29%	32%	30%	18%	36%	52%	33%
Fixed Internet	67%	59%	71%	73%	74%	86%	88%	92%	54%

Source: Customer Satisfaction Survey 2022.

Percentage of respondents who have rated the importance of the services from 7 to 9.

Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Mobile services are the most important telecom services for customers of Ooredoo Qatar Q.P.S.C and customers of Vodafone Qatar P.Q.S.C whilst the fixed voice services are the least important. Results for the importance of fixed internet services show that customers of Ooredoo Qatar Q.P.S.C are more likely to consider them highly important compared to customers of Vodafone Qatar P.Q.S.C.

Table 17: Importance of telecommunication services by service provider

	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	93%	72%	68%
Mobile Internet	88%	70%	64%
Fixed Voice	28%	31%	33%
Fixed Internet	67%	64%	49%

Source: Customer Satisfaction Survey 2022.

Percentage of respondents who have rated the importance of the services from 7 to 9.

Over the past four years, the importance of mobile voice services for Qatar's residents remains

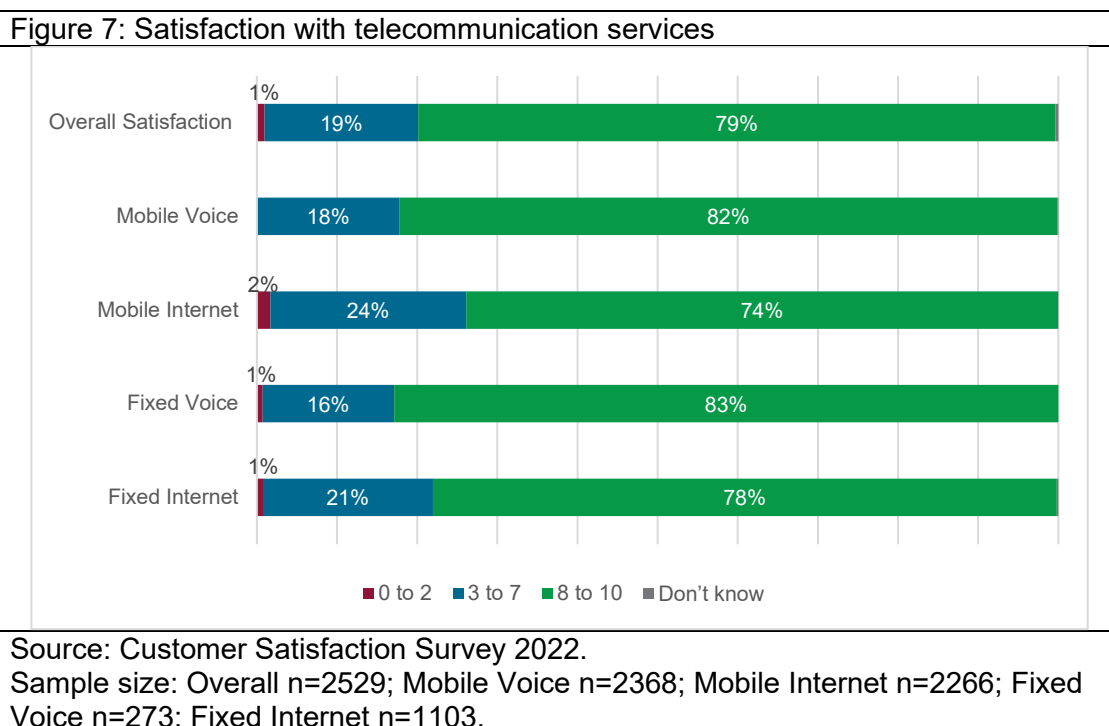
high with a score of 92% in 2018 and 93% in 2022. However, the importance of the mobile internet services declined slightly from 93% in 2018 down to 88% in 2022. Fixed services record the most significant declines since 2018.

Table 18: Importance of telecommunication services, 2018 vs 2022		
	2018	2022
Sample	2362	2529
Mobile Voice	92%	93%
Mobile Internet	93%	88%
Fixed Voice	74%	28%
Fixed Internet	98%	67%

Source: Customer Satisfaction Survey 2018 and 2022.
Percentage of respondents who have rated the importance of the services from 7 to 9.

3.3 Overall satisfaction with telecommunication services

Respondents were asked to rate their satisfaction with each of the telecommunication services on a scale of '0 to 10' where '0' means 'extremely unsatisfied' and '10' means 'extremely satisfied'. For the analysis, the research team considers the answers of between 0-2 to be 'low satisfaction scores', the answers between 3-7 to be 'moderate satisfaction scores', and the answers between 8-10 to be 'high satisfaction scores'. Figure 7 shows that overall, 79% of the respondents are highly satisfied with the telecommunication services provided to them in Qatar. Fixed voice services and mobile voice services record the highest satisfaction scores at 83% and 82% respectively, followed by fixed internet services at 78%, while 74% of the users of mobile internet services report to be highly satisfied with the service. See Figure 7.



The survey results show that females are slightly more likely than males to be highly satisfied with mobile internet services whilst males are more likely to be highly satisfied with fixed services. The results also show that 90% of the Qataris surveyed are satisfied with the telecommunication services provided to them by their service provider compared to 77% for the non-Qataris. Satisfaction scores are lower than average for non-Qatari residents for mobile voice, mobile internet, and fixed voice services. See Tables 19 and 20.

Table 19: Satisfaction with telecommunication services by gender

	Results at the total sample level	Males	Females
Sample	2529	1897	632
Overall Satisfaction	79%	79%	81%
Mobile Voice	82%	82%	81%
Mobile Internet	74%	72%	79%
Fixed Voice	83%	85%	79%
Fixed Internet	78%	79%	74%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 20: Satisfaction with telecommunication services by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Sample	2529	506	2023
Overall Satisfaction	79%	90%	77%
Mobile Voice	82%	91%	80%
Mobile Internet	74%	85%	71%
Fixed Voice	83%	88%	77%
Fixed Internet	78%	75%	79%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Overall, the older adults are the most likely to be highly satisfied with the telecommunication services in the country (see Table 21). Older adults are also more likely than younger age groups to give a score between '8' and '10' for the satisfaction with mobile services. Adults aged above 54 years old are the most satisfied with the fixed voice services whilst they are also the least satisfied with fixed internet services. Adults aged between 25 and 34 years record the lowest satisfaction score for mobile internet services at 69%, while they record the highest score for satisfaction with fixed internet services (82%).

Table 21: Satisfaction with telecommunication services by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Sample	2529	326	926	776	351	150
Overall Satisfaction	79%	76%	77%	81%	83%	86%
Mobile Voice	82%	80%	81%	84%	82%	88%
Mobile Internet	74%	74%	69%	73%	83%	82%
Fixed Voice	83%	73%	86%	78%	83%	95%
Fixed Internet	78%	77%	82%	78%	76%	71%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Overall, all municipalities record high satisfaction scores except for the municipality of Al Wakra with a lower-than-average score of 72%. Al Sheehaniya records the highest satisfaction scores for all telecommunication services (see Table 22). Al Wakra records the lowest satisfaction score for the voice services, both mobile and fixed (73% and 58%, respectively). Umm Slal, Al Shamal, Al Wakra, and Al Daayen record lower than average satisfaction scores for internet services in general.

Table 22: Satisfaction with telecommunication services by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Sample	2529	1052	726	226	125	125	25	100	150
Overall Satisfaction	79%	79%	79%	72%	78%	83%	88%	83%	96%
Mobile Voice	82%	82%	80%	73%	83%	89%	83%	83%	95%
Mobile Internet	74%	74%	74%	67%	65%	78%	67%	72%	93%
Fixed Voice	83%	86%	84%	58%	82%	93%	100%	82%	91%
Fixed Internet	78%	81%	76%	74%	68%	86%	65%	72%	96%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

The survey results show that 81% of Ooredoo Qatar Q.P.S.C customers are overall satisfied with the telecommunication services provided to them compared to 78% for Vodafone Qatar P.Q.S.C customers. Customers of Ooredoo Qatar Q.P.S.C and customers of Vodafone Qatar P.Q.S.C are equally satisfied with the mobile voice services (82%). However, customers of Ooredoo Qatar Q.P.S.C are slightly more satisfied than customer of Vodafone Qatar P.Q.S.C with the internet services (both mobile and fixed). Vodafone Qatar P.Q.S.C records low

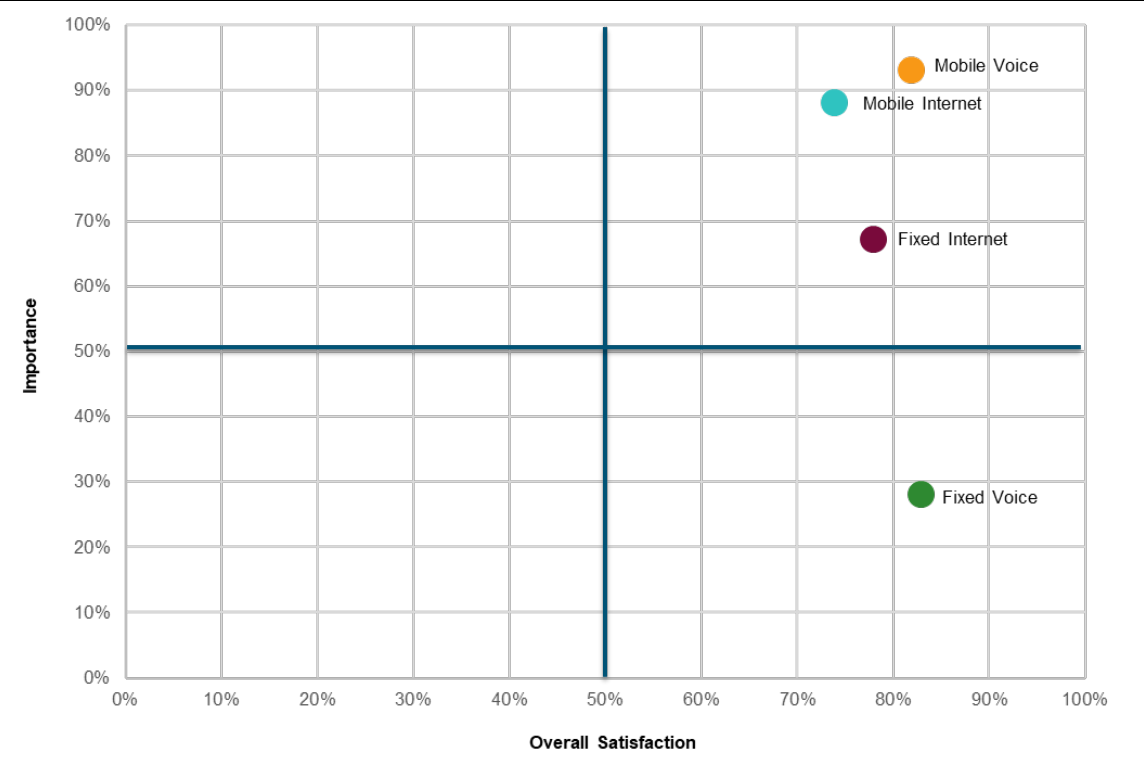
satisfaction score of 67% for fixed voice services against 86% for Ooredoo Qatar Q.P.S.C. See Table 23.

Table 23: Satisfaction with telecommunication services by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Overall Satisfaction	79%	81%	78%
Mobile Voice	82%	82%	82%
Mobile Internet	74%	76%	71%
Fixed Voice	83%	86%	67%
Fixed Internet	78%	79%	71%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

An Importance-Satisfaction analysis was used to measure the level of customers' satisfaction with the various telecommunication services they use. The matrix shown below illustrates the importance of each of the four services and the corresponding level of satisfaction rated by respondents. Mobile Voice and Mobile Internet are two of the most important services to users, but there is still some improvement to be made to increase the customers' satisfaction with those services, especially mobile internet services. Fixed internet services record a higher satisfaction score compared to mobile internet but are less important to customers than mobile services. This suggests that service providers should focus more on further improving mobile services. Although fixed voice services are the least important services for the surveyed sample, it records the highest satisfaction score. See Figure 8.

Figure 8: Importance-Satisfaction Matrix

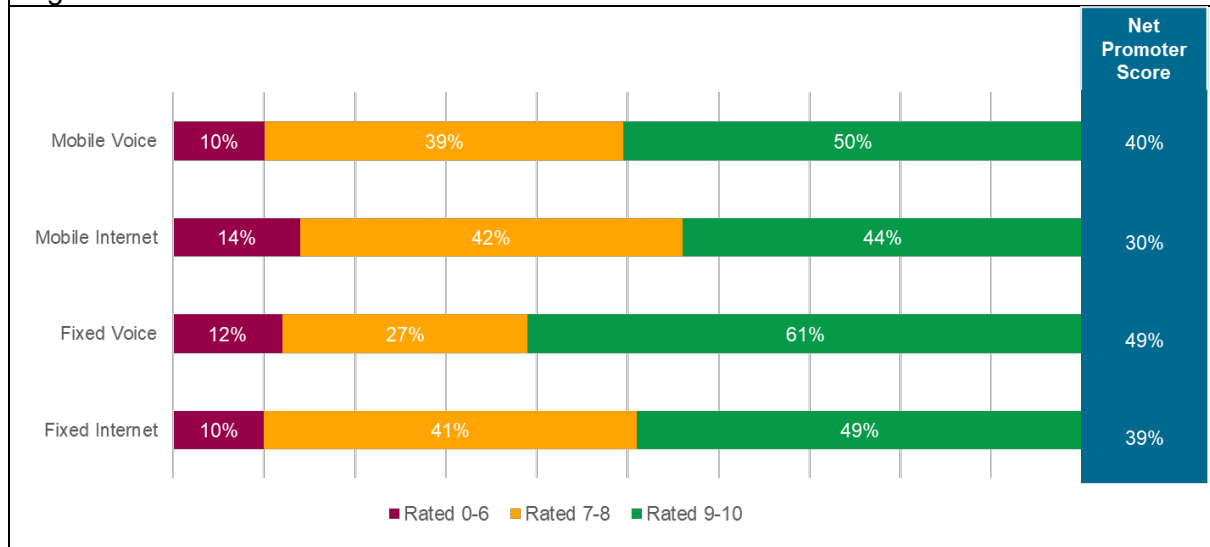


Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

3.4 Customers' intention to recommend telecommunication services

Surveyed telecom customers were asked to indicate how likely they are to recommend each of the telecommunication services they use on a scale of '0 to 10' where '0' means 'do not recommend at all' and '10' means 'strongly recommend'. In research, recommendation scores are analyzed through the Net Promoter Score (NPS) which is a metric that assesses the willingness of customers to recommend a company's products or services to other people. The NPS is determined as the percentage difference between promoters and detractors with promoters being people who rate their recommendation 9-10 and detractors being people who rate their recommendation 0-6. Figure 9 shows the survey results for the intention to recommend telecommunication services. Fixed voice services record the highest NPS and the highest percentage of promoters while mobile internet services record the lowest NPS. However, the NPS is positive and moderately high for across all services.

Figure 9: Intention to recommend telecommunication services



Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Although there are slight to no difference between genders in recommendation scores for fixed services, females seem to be more likely than men to strongly recommend mobile services. Qatari nationals are more likely than non-Qataris to strongly recommend the telecommunication services overall. See Tables 24 and 25.

Table 24: Intention to recommend telecommunication services by gender			
	Results at the total sample level	Males	Females
Sample	2529	1897	632
Mobile Voice	50%	47%	59%
Mobile Internet	44%	40%	54%
Fixed Voice	61%	61%	61%
Fixed Internet	49%	48%	52%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Percentage of respondents who have rated their intention to recommend the services from 9 to 10.

Table 25: Intention to recommend telecommunication services by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Sample	2529	506	2023
Mobile Voice	50%	73%	44%
Mobile Internet	44%	61%	39%
Fixed Voice	61%	76%	43%
Fixed Internet	49%	56%	46%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their intention to recommend the services from 9 to 10.

Table 26 shows that older adults aged above 44 years are more likely than younger adults to strongly recommend mobile services while those aged 25-34 years old are the least likely to be promoters of mobile voice and mobile internet services. However, adults between 25-34 years old record the highest recommendation scores for fixed services with 64% for fixed voice and 52% for fixed internet.

Table 26: Intention to recommend telecommunication services by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Sample	2529	326	926	776	351	150
Mobile Voice	50%	51%	45%	50%	61%	58%
Mobile Internet	44%	48%	37%	44%	54%	55%
Fixed Voice	61%	53%	64%	61%	61%	62%
Fixed Internet	49%	51%	52%	45%	49%	47%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their intention to recommend the services from 9 to 10.

Overall, Al Sheehaniya is the only municipality to record strong recommendation and higher than average scores across mobile voice, mobile internet and fixed internet services (see Table 27). Al Daayen records the lowest percentage of respondents who rated their intention to recommend mobile voice services between '9' and '10' (36%), while Al Khor and Al Shamal record good scores at 58% and 57% respectively. Residents of Umm Slal record the highest promoters' percentage for fixed voice services at 78% while Al Shamal records the lowest percentage of 29%.

Table 27: Intention to recommend telecommunication services by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Sample	2529	1052	726	226	125	125	25	100	150
Mobile Voice	50%	50%	47%	44%	50%	58%	57%	36%	71%
Mobile Internet	44%	44%	41%	41%	45%	43%	43%	47%	61%
Fixed Voice	61%	61%	62%	35%	78%	53%	29%	71%	73%
Fixed Internet	49%	54%	42%	52%	45%	55%	45%	45%	65%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their intention to recommend the services from 9 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Customers of Ooredoo Qatar Q.P.S.C are more likely than customers of Vodafone Qatar P.Q.S.C to strongly recommend the telecommunication services provided to them in general. Table 28 shows that the percentage of surveyed customers of Vodafone Qatar P.Q.S.C who rate their intention to recommend the mobile and fixed services either '9' or '10' is lower than average.

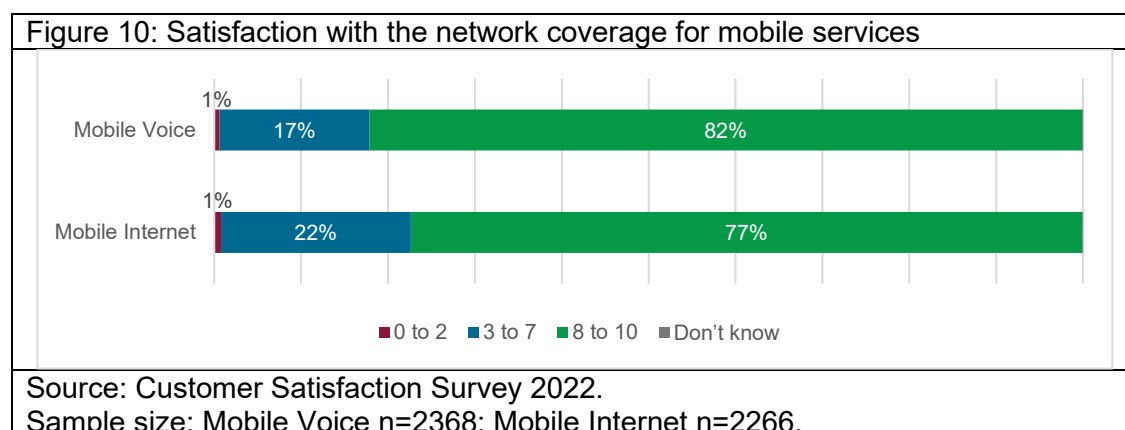
Table 28: Intention to recommend telecommunication services by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	50%	56%	41%
Mobile Internet	44%	48%	38%
Fixed Voice	61%	63%	51%
Fixed Internet	49%	51%	38%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their intention to recommend the services from 9 to 10.

3.5 Customer experience with telecommunication network

3.5.1 Network coverage

The majority of the surveyed users of mobile voice services are highly satisfied with the network coverage as 82% of them gave a rate between '8' and '10' for their satisfaction with this parameter. And 77% of the surveyed users of mobile internet services are highly satisfied with the network coverage of their main service provider. See figure 10.



Overall, male customers are slightly more likely than females to be highly satisfied with the network coverage of the mobile services. Almost nine in ten Qatari nationals are highly satisfied with the network coverage for their mobile voice service compared to eight in ten for non-Qataris.

The proportion of Qataris and non-Qataris respondents who gave a rating of between '8' and '10' for the satisfaction with the network coverage of the mobile internet services is almost the same with 76% for Qataris and 78% for non-Qataris. See Tables 29 and 30.

Table 29: Satisfaction with the network coverage for mobile services by gender			
	Results at the total sample level	Males	Females
Mobile Voice	82%	83%	80%
Mobile Internet	77%	79%	71%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 30: Satisfaction with the network coverage for mobile services by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	82%	88%	81%
Mobile Internet	77%	76%	78%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Satisfaction with mobile voice network coverage is the highest amongst the age group 35-44 years old with 85% of them giving a rate between '8' and '10'. The lowest satisfaction scores are observed for age groups 15-24 years (76%) and 55+ years (78%). The younger respondents also record the lowest satisfaction scores for mobile internet network coverage at 65%. Respondents aged between 45 and 54 years old are the most likely to be highly satisfied with the network coverage of their mobile internet services. See Table 31.

Table 31: Satisfaction with the network coverage for mobile services by age group

	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	82%	76%	82%	85%	82%	78%
Mobile Internet	77%	65%	79%	78%	80%	78%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

The municipalities of Al Khor, Al Daayen, and Al Sheehaniya record the highest satisfaction scores for the network coverage of mobile services while Al Wakra records the lowest scores at 70% for mobile voice and 63% for mobile internet. See Table 32.

Table 32: Satisfaction with the network coverage for mobile services by municipality

	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	82%	80%	82%	70%	88%	93%	82%	93%	91%
Mobile Internet	77%	77%	78%	63%	74%	86%	63%	89%	91%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

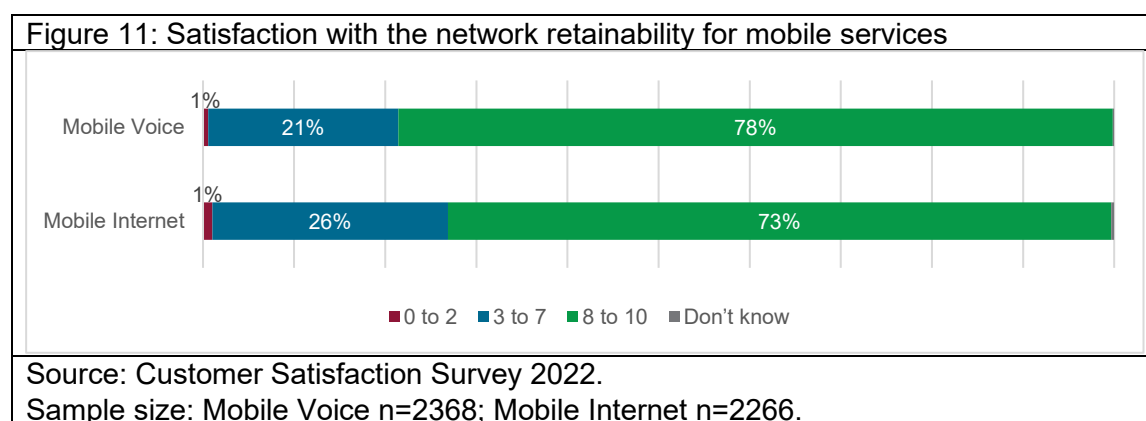
Table 33 shows the proportion of Ooredoo Qatar Q.P.S.C users and Vodafone Qatar P.Q.S.C users who rated their satisfaction with the network coverage of their mobile voice and internet services between '8' and '10'. The results show that both segments are equally satisfied with the mobile internet network coverage while customers of Ooredoo Qatar Q.P.S.C are slightly more satisfied than users of Vodafone Qatar P.Q.S.C. with the Mobile Voice services.

Table 33: Satisfaction with the network coverage for mobile services by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	82%	83%	80%
Mobile Internet	77%	77%	77%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.5.2 Network retainability

Overall, seven in ten users of mobile services gave a rating of '8-10' when asked to rate their satisfaction with the network retainability. However, the proportion of mobile voice users are slightly more satisfied with the network retainability compared to users of mobile internet (78% versus 73%, respectively). See Figure 11.



In general, male respondents are more satisfied than females with the network retainability of mobile services as shown in Table 34. Table 35 shows that the percentage of Qatari nationals who are highly satisfied with the network retainability of the mobile voice services is higher than the non-Qataris.

Table 34: Satisfaction with the network retainability for mobile services by gender

	Results at the total sample level	Males	Females
Mobile Voice	78%	79%	75%
Mobile Internet	73%	74%	68%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 35: Satisfaction with the network retainability for mobile services by nationality

	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	78%	82%	77%
Mobile Internet	73%	72%	73%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Satisfaction with the network retainability of mobile voice services is higher amongst age groups 35-44 years and 45-54 years with eight in ten users giving a rate of '8-10'. Age groups 15-24 years record the lowest satisfaction scores for the network retainability for mobile services, both voice (72%) and internet (65%). See Table 36.

Table 36: Satisfaction with the network retainability for mobile services by age group

	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	78%	72%	79%	81%	80%	73%
Mobile Internet	73%	65%	74%	73%	75%	75%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Al Daayen records the highest satisfaction score for the network retainability for mobile voice services (93%), followed by Al Sheehaniya (90%), Al Khor (89%), Umm Slal (84%), and Al Rayyan (79%). The rest of the municipalities record lower than average satisfaction scores with the lowest scores being 65% for Al Shamal and 66% for Al Wakra. Among users of mobile internet services, the highest satisfaction scores for network retainability are observed for Al Sheehaniya (91%), followed by Al Khor (78%) and Al Rayyan (75%), whilst the lowest scores are also observed for Al Shamal (57%) and Al Wakra (59%). See Table 37.

Table 37: Satisfaction with the network retainability for mobile services by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Dayyan	Al Sheehaniya
Mobile Voice	78%	77%	79%	66%	84%	89%	65%	93%	90%
Mobile Internet	73%	73%	75%	59%	69%	78%	57%	67%	91%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

For the satisfaction with network retainability, users of Ooredoo Qatar Q.P.S.C record the highest levels of satisfaction for mobile voice services at 80% compared to 76% for Vodafone Qatar P.Q.S.C. But the users of Vodafone Qatar P.Q.S.C mobile internet record a slightly higher score for the satisfaction with the network retainability. See Table 38.

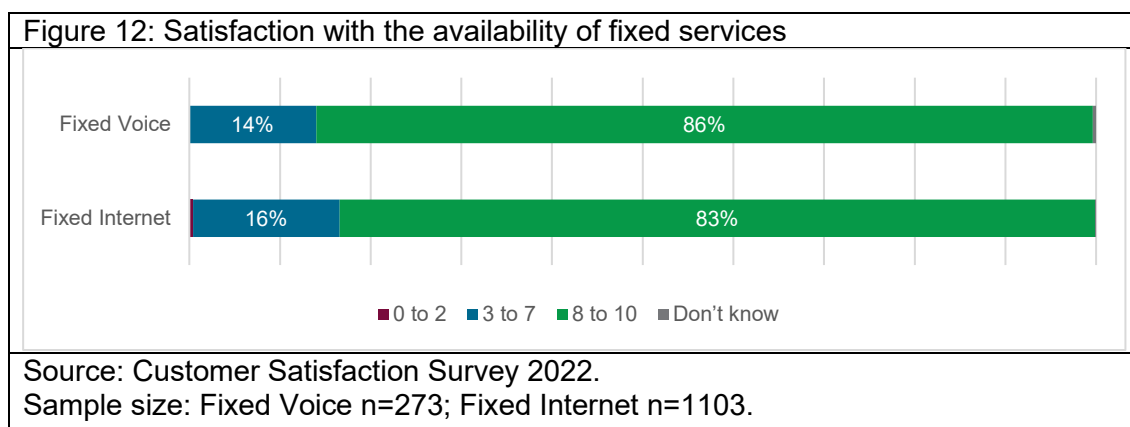
Table 38: Satisfaction with the network retainability for mobile services by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	78%	80%	76%
Mobile Internet	73%	72%	74%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.5.3 Availability of service

Surveyed users of fixed telecommunication services were asked to rate their satisfaction with the availability of the voice and internet services. Overall, eight in ten users gave a rate between '8' and '10' for their satisfaction with the availability of the fixed services with a slightly higher percentage of 86% for voice services compared to 83% for internet services. See Figure 12.



Overall, male respondents are more likely than females to be highly satisfied with the availability of fixed services. Nine in ten Qatari nationals gave a rating of '8 to 10' for the satisfaction with the availability of fixed voice services compared to 79% of non-Qataris. However, non-Qataris are more likely to give higher satisfaction scores for the availability of fixed internet services with a percentage of 85% compared to 79% for Qataris. See Tables 39 and 40.

Table 39: Satisfaction with the availability of fixed services by gender			
	Results at the total sample level	Males	Females
Fixed Voice	86%	88%	81%
Fixed Internet	83%	85%	80%

Source: Customer Satisfaction Survey 2022.
Sample size: Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 40: Satisfaction with the availability of fixed services by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Fixed Voice	86%	91%	79%
Fixed Internet	83%	79%	85%

Source: Customer Satisfaction Survey 2022.
Sample size: Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

The highest satisfaction scores for the availability of fixed voice services are recorded for the older customers aged 45 years and above whilst the lowest score is observed for the age group 35-44 years (74%). In contrast, users aged between 35-44 years old record the highest satisfaction score along with those aged 25-34 years old for the availability of fixed internet services (85%). The lowest satisfaction score for the availability of fixed internet services is recorded for adults aged 55 years old and above (74%). See Table 41.

Table 41: Satisfaction with the availability of fixed services by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Fixed Voice	86%	81%	87%	74%	93%	95%
Fixed Internet	83%	78%	85%	85%	84%	74%

Source: Customer Satisfaction Survey 2022.
Sample size: Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Overall, most municipalities record high satisfaction scores for the availability of fixed voice services with scores that are higher than the average of 86%. However, the municipality of Al Wakra records a very low satisfaction score of 62% when compared to the other areas. Regarding the availability of fixed internet services, the highest satisfaction scores are observed for Al Khor (88%) and Al Sheehaniya (87%) while the lowest scores are recorded for Al Shamal (71%) and Al Wakra (76%). See Table 42.

Table 42: Satisfaction with the availability of fixed services by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Fixed Voice	86%	85%	88%	62%	95%	93%	100%	89%	92%
Fixed Internet	83%	85%	83%	76%	81%	88%	71%	83%	87%

Source: Customer Satisfaction Survey 2022.
Sample size: Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Table 43 shows the satisfaction scores for the availability of fixed services by service provider. The proportion of users of fixed services who rated their level of satisfaction with the availability of the services between '8' and '10' is higher among the customers of Ooredoo Qatar Q.P.S.C.

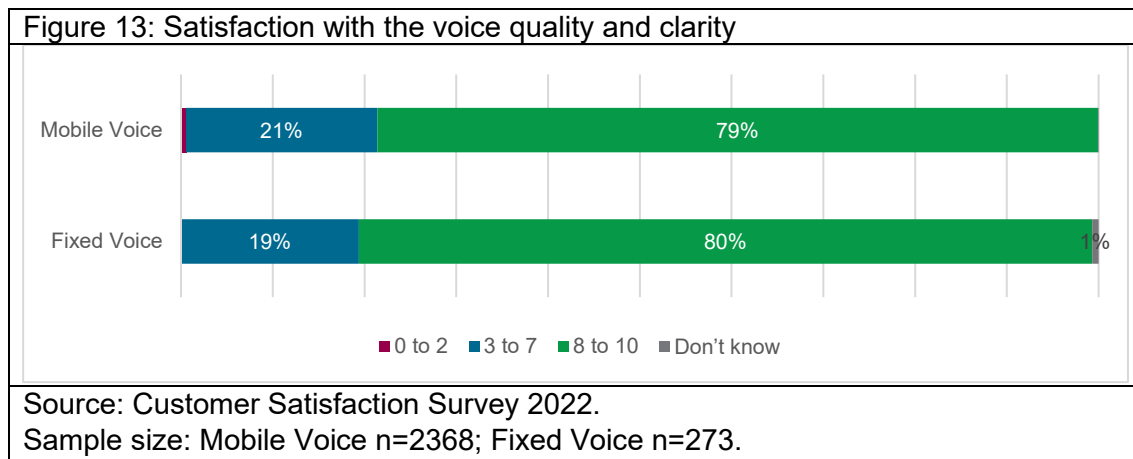
Table 43: Satisfaction with the availability of fixed services by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Fixed Voice	86%	87%	78%
Fixed Internet	83%	85%	77%

Source: Customer Satisfaction Survey 2022.
Sample size: Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.5.4 Voice quality and clarity

Surveyed users of voice services were asked to rate their satisfaction level with voice quality and clarity. Overall, the survey results show that 79% of the mobile voice users gave a rate of between '8' and '10' with 30% of them stating they are extremely satisfied with the mobile voice quality and clarity. The results also show that eight in ten users of fixed voice services gave a satisfaction rate of '8 to 10' with 44% of the respondents saying they are extremely satisfied with

the fixed voice quality and clarity. See Figure 13.



Overall, both genders recorded average satisfaction scores for the quality and clarity of the mobile voice services they use, but the males seem to be more satisfied than the female users with the fixed voice quality and clarity (84% versus 72% respectively). Eight in ten Qataris nationals are highly satisfied with the voice quality and clarity of both mobile and fixed services compared to seven in ten for non-Qataris. See Tables 44 and 45.

Table 44: Satisfaction with the voice quality and clarity by gender

	Results at the total sample level	Males	Females
Mobile Voice	79%	79%	78%
Fixed Voice	80%	84%	72%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Fixed Voice n=273.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 45: Satisfaction with the voice quality and clarity by nationality

	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	79%	85%	77%
Fixed Voice	80%	87%	71%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Fixed Voice n=273.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

The survey results by age groups show that the older customers aged 55 years and above record the highest satisfaction scores (rate between 8 and 10) for both mobile and fixed voice services on the voice quality and clarity parameter. In contrast, the younger age group (15-24 years) records the lowest scores with 74% for mobile voice and 66% for fixed voice. See Table 46.

Table 46: Satisfaction with the voice quality and clarity by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	79%	74%	77%	81%	79%	86%
Fixed Voice	80%	66%	84%	72%	85%	93%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Fixed Voice n=273.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Residents of Al Sheehaniya, Al Khor, Al Shamal, Al Daayen, Umm Slal, and Al Rayyan record higher than average scores for the satisfaction with the voice quality and clarity for both mobile and fixed services. The lowest satisfaction scores are observed for the municipality of Al Wakra with 68% for mobile voice services and 46% for fixed voice services. See Table 47.

Table 47: Satisfaction with the voice quality and clarity by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	79%	77%	79%	68%	79%	90%	82%	81%	93%
Fixed Voice	80%	78%	83%	46%	83%	93%	86%	89%	100%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Fixed Voice n=273.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Users of Vodafone Qatar P.Q.S.C are less likely than users of Ooredoo Qatar Q.P.S.C to give a rate of '8 to 10' for the satisfaction with the voice quality and clarity for both fixed and mobile services. See Table 48.

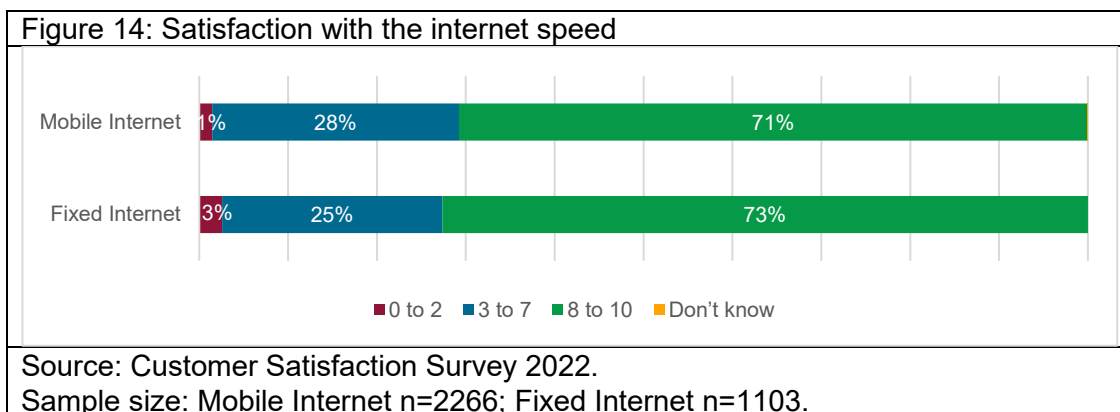
Table 48: Satisfaction with the voice quality and clarity by service provider

	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	79%	82%	74%
Fixed Voice	80%	82%	69%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Fixed Voice n=273.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.5.5 Internet speed

Respondents who use internet services were asked to rate their satisfaction with the internet speed for mobile and fixed services. Overall, seven in ten respondents are highly satisfied with the internet speed of the mobile and fixed services with over a quarter of internet users giving a rate of '8', another quarter giving a rate of '9', and one in ten respondents stating they are extremely satisfied with the internet speed. See Figure 14.



Satisfaction with the internet speed seem to be higher amongst the male sample and the non-Qataris sample. Seven in ten males are highly satisfied with the internet speed compared to six in ten females, and seven in ten non-Qataris are highly satisfied with the internet speed compared to six in ten Qataris. However, there is a wider difference in results between nationalities in satisfaction scores for the fixed internet services. See Tables 49 and 50.

Table 49: Satisfaction with the internet speed by gender			
	Results at the total sample level	Males	Females
Mobile Internet	71%	72%	68%
Fixed Internet	73%	75%	65%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 50: Satisfaction with the internet speed by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Internet	71%	67%	72%
Fixed Internet	73%	59%	79%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Looking at the findings by age group, the highest satisfaction scores for internet speed are recorded for the age group 25-34 years with 74% for mobile internet and 77% for fixed internet. In opposite, the lowest scores are recorded by the younger respondents (15-24 years) for mobile internet and the older age group (55+ years) for fixed internet. See Table 51.

Table 51: Satisfaction with the internet speed by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years

Mobile Internet	71%	63%	74%	70%	72%	68%
Fixed Internet	73%	68%	77%	73%	70%	64%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Overall, the municipality of Al Sheehaniya records the highest percentage of respondents who rated their satisfaction with the internet speed '8', '9', or '10' whilst Al Shamal records the lowest scores. Umm Slal, Al Wakra, and Al Daayen also record lower than average satisfaction scores for both mobile and fixed internet speed. See Table 52.

Table 52: Satisfaction with the internet speed by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Internet	71%	73%	69%	64%	62%	70%	58%	65%	85%
Fixed Internet	73%	73%	76%	65%	61%	77%	33%	69%	91%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

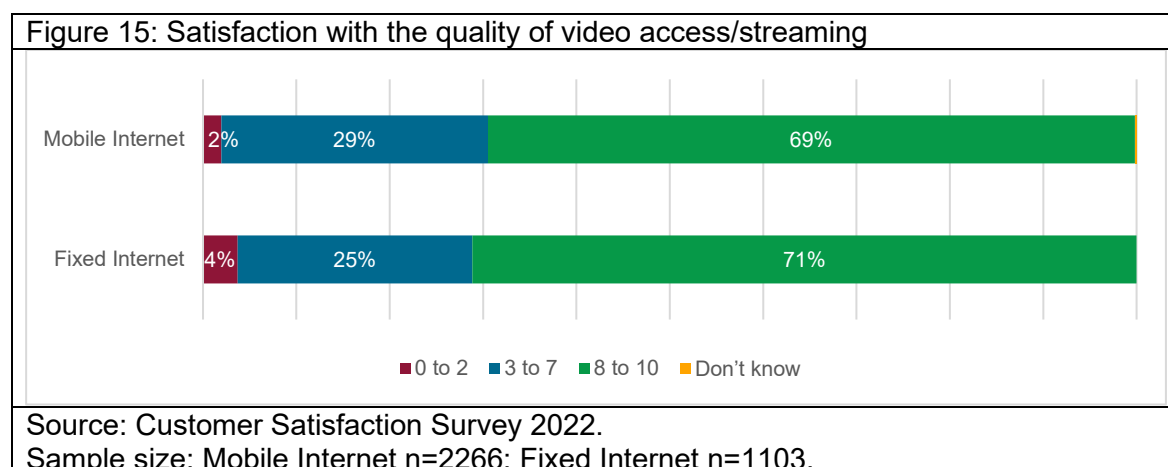
The results for the satisfaction with the internet speed by service provider show that customers of Ooredoo Qatar Q.P.S.C and customers of Vodafone Qatar P.Q.S.C are equally satisfied with mobile internet speed with 71% of customers of each provider giving a satisfaction rate of between '8' and '10'. For fixed services, 74% of customers of Ooredoo Qatar Q.P.S.C are highly satisfied with the internet speed versus 68% of customers of Vodafone Qatar P.Q.S.C. See Table 53.

Table 53: Satisfaction with the internet speed by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Internet	71%	71%	71%
Fixed Internet	73%	74%	68%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.5.6 Quality of video access/streaming

Users of internet services were also asked to rate their satisfaction with the quality of video access and streaming. Overall, the results show that 70% of the respondents are highly satisfied with the quality of video access/streaming for mobile internet services and provided a rate between '8' and '10'. Seven in ten users of fixed internet gave a rate of '8 to 10' for the satisfaction with the quality of video access and streaming. See Figure 15.



Male customers are more likely than female customers to give satisfaction rates from '8' to '10' for the quality of video access and streaming. Females record a relatively low score for the satisfaction with quality of video access and streaming for both mobile and fixed internet services with a percentage of 65%. Qatari nationals also record lower than average satisfaction scores for this parameter and the lowest score is recorded for the fixed internet services at 57%. Non-Qatari respondents record satisfaction scores that are higher than the average scores. See

Tables 54 and 55.

Table 54: Satisfaction with the quality of video access/streaming by gender			
	Results at the total sample level	Males	Females
Mobile Internet	70%	71%	65%
Fixed Internet	71%	73%	65%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 55: Satisfaction with the quality of video access/streaming by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Internet	70%	64%	71%
Fixed Internet	71%	57%	77%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Overall, all age groups above 24 years report higher than average satisfaction scores for the quality of video access and streaming for mobile internet, with those aged 45-54 years recording the highest percentage of people rating their satisfaction between '8' and '10'. Respondents aged 25-34 years record the highest satisfaction score for fixed internet on this parameter, followed by the age group 45-54 years. Adults aged 55 years old and above record the lowest percentage of those rating their satisfaction with the quality of video access/streaming of fixed internet between '8' and '10'. See Table 56.

Table 56: Satisfaction with the quality of video access/streaming by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Internet	70%	60%	71%	69%	75%	68%
Fixed Internet	71%	69%	77%	68%	72%	61%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

The majority of the surveyed residents of Al Sheehaniya (eight in ten respondents) rated their satisfaction with the quality of video access and streaming from '8' to '10' for both mobile and fixed internet services. Umm Slal and AL Shamal record low satisfaction scores for both fixed and mobile internet on this parameter. Al Daayen and Al Wakra also record lower than average satisfaction scores for mobile internet quality of video access and streaming. See Table 57.

Table 57: Satisfaction with the quality of video access/streaming by municipality

	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Internet	70%	72%	70%	60%	52%	71%	57%	58%	87%
Fixed Internet	71%	72%	73%	72%	53%	72%	33%	71%	89%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Observing the findings for the satisfaction with the quality of video access and streaming by service provider, both Ooredoo Qatar Q.P.S.C and Vodafone Qatar P.Q.S.C seem to perform well for mobile and fixed services. But Vodafone Qatar P.Q.S.C records slightly higher percentages than Ooredoo Qatar Q.P.S.C for respondents who rate their satisfaction between '8' and '10'. See Table 58.

Table 58: Satisfaction with the quality of video access/streaming by service provider

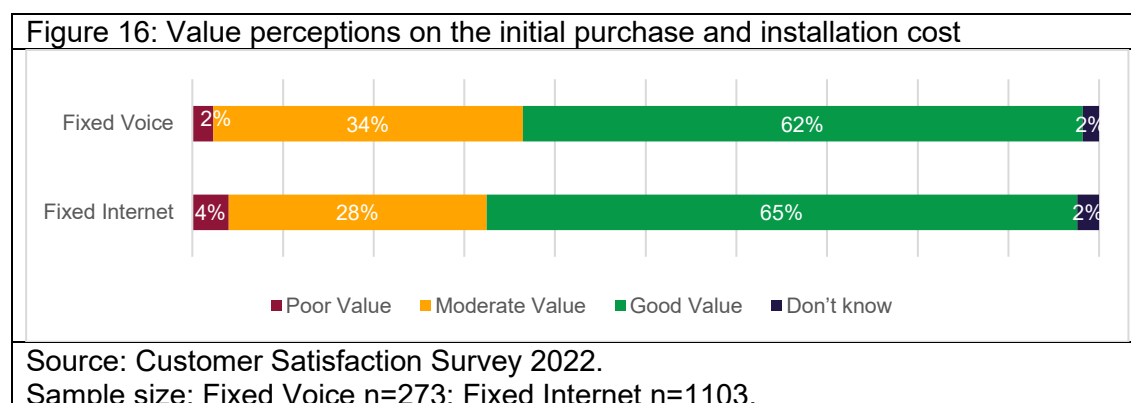
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Internet	70%	68%	71%
Fixed Internet	71%	71%	72%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.6 Customers' perceptions on pricing

3.6.1 Initial purchase and installation cost

Customers of fixed services were asked about their value perceptions on the initial purchase and installation cost for both voice and internet services. Overall, six in ten respondents have good value perceptions for both voice and internet. A third of the users of fixed voice services have moderate value perceptions on the initial purchase and installation cost compared to almost three in ten users of fixed internet services. See Figure 16.



Female customers are more likely than males to have good value perceptions on the initial purchase and installation cost of fixed voice services (65% versus 60%, respectively). Qatari nationals record higher than average percentages for respondents who have good value perceptions on the initial purchase and installation cost for both voice and internet services. See Tables 59 and 60.

Table 59: Value perceptions on the initial purchase and installation cost by gender

	Results at the total sample level	Males	Females
Fixed Voice	62%	60%	65%
Fixed Internet	65%	65%	64%

Source: Customer Satisfaction Survey 2022.
Sample size: Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.

Table 60: Value perceptions on the initial purchase and installation cost by nationality

	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Fixed Voice	62%	73%	49%
Fixed Internet	65%	76%	60%

Source: Customer Satisfaction Survey 2022.
Sample size: Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.

Overall, fixed services users aged between 25 and 34 years old are the least likely to have good value perceptions on the initial purchase and installation costs of the fixed internet services. And fixed voice users aged 55 years old and above are the least likely to have good perceptions on the initial purchase and installation costs. Respondents aged 25-34 years old also record a low value perception score of 58% for fixed voice services. See Table 61.

Table 61: Value perceptions on the initial purchase and installation cost by age group

	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Fixed Voice	62%	61%	58%	64%	65%	56%
Fixed Internet	65%	66%	62%	66%	67%	69%

Source: Customer Satisfaction Survey 2022.
Sample size: Fixed Voice n=273; Fixed Internet n=1103.

Percentage of respondents who have good value perceptions on the costs of the services.

Umm Slal report the highest percentage of residents who have good value perceptions on the initial purchase and installation cost of the fixed services (87% for mobile, and 78% for internet). Al Khor, Al Sheehaniya, and Al Rayyan also record good scores for voice services, with at least seven in ten users in each municipality having a good value perception on this parameter. These municipalities, in addition to Al Shamal, also record good value perceptions scores for fixed internet services on the same parameter. The lowest value perception scores for the initial purchase and installation cost are recorded for Al Wakra (36% for voice and 53% for internet), Al Daayen (44% for voice and 59% for internet). Al Shamal also records a low value perception score of 43% for the fixed voice services. See Table 62.

Table 62: Value perceptions on the initial purchase and installation cost by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Fixed Voice	62%	59%	71%	36%	87%	79%	43%	44%	73%
Fixed Internet	65%	62%	65%	53%	78%	77%	76%	59%	74%

Source: Customer Satisfaction Survey 2022.
Sample size: Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Table 63 shows the survey results for the value perceptions on the initial purchase and installation cost per service provider. It is observed that customers of Ooredoo Qatar Q.P.S.C are more likely than customers of Vodafone Qatar P.Q.S.C to have good value perceptions on the initial purchase and installation cost of fixed services.

Table 63: Value perceptions on the initial purchase and installation cost by service provider

	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Fixed Voice	62%	64%	50%
Fixed Internet	65%	68%	53%

Source: Customer Satisfaction Survey 2022.
Sample size: Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.

3.6.2 The monthly rental charge (including packages)

Users of fixed and mobile services were asked to indicate whether they have poor, moderate, or good value perceptions on the monthly rental charges for each of the services they use, including voice and internet. Overall, fixed voice services record the highest percentage of users who have good value perceptions on the monthly rental changes at 61%. Over half of the users of mobile services and fixed internet also have good value perceptions on the monthly rental charges. Four in ten users of internet services have moderate value perceptions on the monthly rental changes compared to over a third for users of voice services. See Figure 17.

Figure 17: Value perceptions on the monthly rental charges



Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Overall, female respondents record higher percentages than males for the proportion of people who have good value perceptions on the monthly rental changes. Qatari nationals also record

higher percentages compared to non-Qataris. The proportion of non-Qataris who have good value perceptions on the monthly rental charges of telecommunication services is relatively low across all services, with the lowest score recorded for fixed voice at 42%. See Tables 64 and 65.

Table 64: Value perceptions on the monthly rental charges by gender			
	Results at the total sample level	Males	Females
Mobile Voice	56%	54%	63%
Mobile Internet	54%	51%	65%
Fixed Voice	61%	60%	62%
Fixed Internet	53%	51%	61%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.

Table 65: Value perceptions on the monthly rental charges by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	56%	77%	51%
Mobile Internet	54%	77%	48%
Fixed Voice	61%	77%	42%
Fixed Internet	53%	70%	46%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.

Surveyed adults aged over 44 years are the most likely to have good value perceptions on the monthly rental charges for mobile services in general while the age group 25-34 years are the least likely to have good value perceptions. In opposite, users aged 25-34 years old are the most likely to have good value perceptions on the monthly rental charges of fixed voice services (69%) while adults aged 55 years old and above are the least likely to report good value perceptions

on this matter. For the value perceptions on the monthly rental charges of fixed internet services, the highest percentage is recorded for the youngest age group (15-24 years) and the lowest percentage is recorded for the 25-34 years old group (50%). See Table 66.

	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	56%	58%	45%	60%	72%	64%
Mobile Internet	54%	57%	43%	59%	66%	69%
Fixed Voice	61%	58%	69%	59%	59%	56%
Fixed Internet	53%	64%	50%	51%	54%	59%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.

Overall, Umm Slal, Al Khor, Al Daayen, Al Shamal, and Al Rayyan have higher than average scores for good value perceptions on the monthly rental charges for mobile voice services. Umm Slal, Al Khor, and Al Daayen also score higher than average for mobile internet and fixed voice services in addition to Al Sheehaniya. Doha records the lowest proportion of people who have good value perceptions of monthly rental charges for mobile services and a lower-than-average score for fixed voice services. Al Wakra also records low proportions across all services. See Table 67.

	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Dayyan	Al Sheehaniya
Mobile Voice	56%	49%	59%	49%	82%	81%	70%	74%	54%
Mobile Internet	54%	48%	54%	51%	75%	67%	79%	63%	72%

Fixed Voice	61%	56%	60%	38%	83%	67%	57%	70%	73%
Fixed Internet	53%	57%	49%	49%	62%	48%	62%	37%	85%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Customers of Ooredoo Qatar Q.P.S.C are more likely than customers of Vodafone Qatar P.Q.S.C to have good value perceptions on the monthly rental changes for both mobile and fixed services. See Table 68.

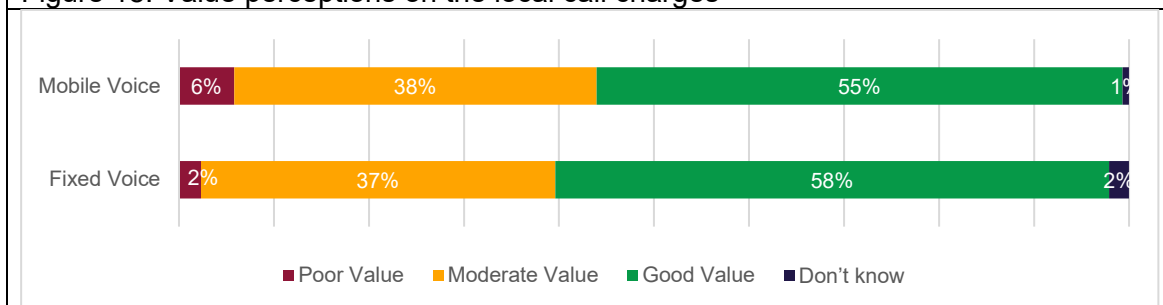
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	56%	58%	52%
Mobile Internet	54%	58%	49%
Fixed Voice	61%	64%	48%
Fixed Internet	53%	55%	45%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.

3.6.3 Local call charges

Users of voice services, either mobile or fixed, were asked to indicate their value perceptions on the local call charges. The results show that over half of the surveyed sample for each of the services have good value perceptions on the local call charges (55% for mobile voice and 58% for fixed voice). Another third of the respondents have moderate value perceptions on the local call charges (38% for mobile voice and 37% for fixed voice). See Figure 18.

Figure 18: Value perceptions on the local call charges



Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Fixed Voice n=273.

Overall, female respondents have more positive perceptions on the local call charges for both mobile and fixed services. Table 70 shows that there is a wide difference in the value perceptions on the local call charges between Qataris and non-Qataris. Eight in ten Qataris have good value perceptions on the local call charges of the mobile voice services compared to 49% of non-Qataris. And three quarters of Qataris have good value perceptions on the local call charges of fixed voice services against 39% of non-Qataris.

Table 69: Value perceptions on the local call charges by gender

	Results at the total sample level	Males	Females
Mobile Voice	55%	53%	62%
Fixed Voice	58%	56%	62%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Fixed Voice n=273.

Percentage of respondents who have good value perceptions on the costs of the services.

Table 70: Value perceptions on the local call charges by nationality

	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	55%	80%	49%
Fixed Voice	58%	75%	39%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Fixed Voice n=273.

Percentage of respondents who have good value perceptions on the costs of the services.

For the mobile voice services, older age groups (45 years and over) seem to record higher proportions of respondents who have good value perceptions on the local call charges, while the surveyed group of 25-34 years record the lowest proportion of 47%. For the fixed voice services, respondents aged 25-34 years old are the most likely to have good value perceptions on the local call charges while the youngest age group (15-24 years) are the least likely to have positive perceptions on the local call charges. See Table 71.

Table 71: Value perceptions on the local call charges by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	55%	57%	47%	57%	71%	64%
Fixed Voice	58%	48%	66%	61%	52%	62%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Fixed Voice n=273.
Percentage of respondents who have good value perceptions on the costs of the services.

Looking at the survey results by municipality, Al Khor and Umm Slal record the highest proportions of respondents who have good value perceptions on the local call charges for both mobile and fixed voice services. Al Shamal, Al Daayen, and Al Rayyan also record good scores for mobile voice services while Doha and Al Sheehaniya record good scores for the fixed voice services.

Table 72: Value perceptions on the local call charges by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Dayyan	Al Sheehaniya
Mobile Voice	55%	50%	55%	51%	78%	82%	74%	61%	54%
Fixed Voice	58%	62%	54%	32%	77%	80%	43%	46%	73%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Fixed Voice n=273.
Percentage of respondents who have good value perceptions on the costs of the services.

Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

In general, the survey results show that customers of Ooredoo Qatar Q.P.S.C are more likely than customers of Vodafone Qatar P.Q.S.C to have good value perceptions on the local call charges for both mobile and fixed voice services. See Table 73.

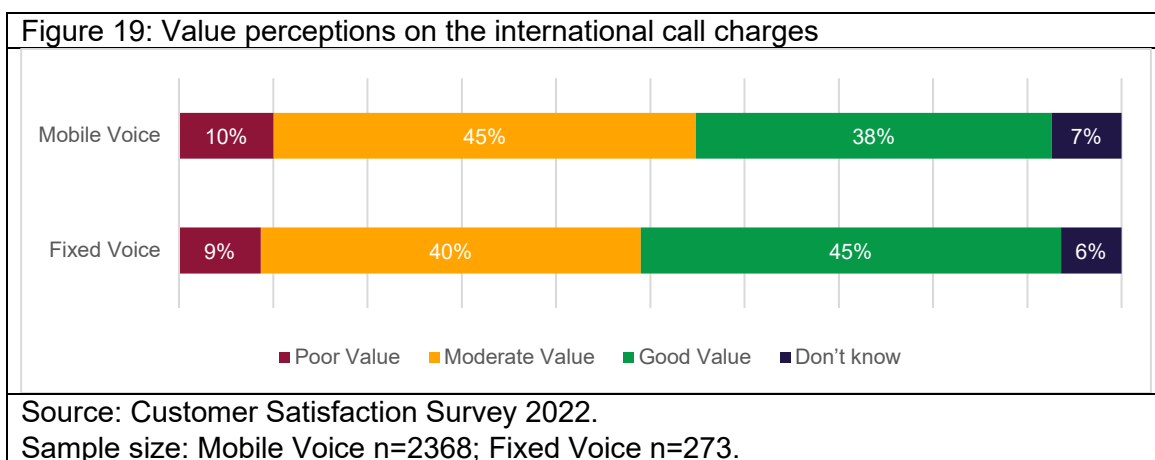
Table 73: Value perceptions on the local call charges by service provider

	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	55%	60%	49%
Fixed Voice	58%	61%	47%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Fixed Voice n=273.
Percentage of respondents who have good value perceptions on the costs of the services.

3.6.4 International call charges

Users of voice services were also asked to indicate their value perceptions on the international call charges. The results show that over a third of the mobile voice users have good value perceptions on international call charges compared to four in ten users for fixed voice services. In addition, four in ten users of mobile and fixed voice services have moderate value perceptions on international call charges. See Figure 19.



Overall, female respondents have more positive perceptions on the international call charges for

mobile voice services while males have slightly more positive perceptions on international call charges for fixed voice services. Table 75 shows that there is a wide difference in the value perceptions on the international call charges between Qataris and non-Qataris. Over half of the Qataris surveyed have good value perceptions on the international call charges of both mobile and fixed voice services compared to three in ten respondents for the non-Qataris segment.

Table 74: Value perceptions on the international call charges by gender			
	Results at the total sample level	Males	Females
Mobile Voice	38%	35%	47%
Fixed Voice	45%	45%	43%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Fixed Voice n=273.
Percentage of respondents who have good value perceptions on the costs of the services.

Table 75: Value perceptions on the international call charges by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	38%	58%	33%
Fixed Voice	45%	55%	32%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Fixed Voice n=273.
Percentage of respondents who have good value perceptions on the costs of the services.

For the mobile voice services, older age groups (45 years and over) and the youngest age group (15-24 years) seem to record higher-than-average proportions of respondents who have good value perceptions on the international call charges, while the surveyed group of 25-34 years record the lowest proportion of 31%. For the fixed voice services, respondents aged 25-34 years old are the most likely to have good value perceptions on the international call charges while the youngest age group (15-24 years) are the least likely to have positive perceptions. See Table 76.

Table 76: Value perceptions on the international call charges by age group

	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	38%	42%	31%	38%	50%	46%
Fixed Voice	45%	36%	51%	45%	46%	40%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Fixed Voice n=273.

Percentage of respondents who have good value perceptions on the costs of the services.

Looking at the survey results by municipality, Al Shamal, Al Khor, Al Rayyan, Umm Slal, Al Sheehaniya, and Al Wakra record higher than average proportions of respondents who have good value perceptions on the international call charges for mobile voice services while the municipality of AL Daayen records the lowest percentage of 25%. Al Sheehaniya and Umm Slal record the highest proportions for people who have good value perceptions of international call charges for fixed voice at 64% and 61% respectively. See Table 77.

Table 77: Value perceptions on the international call charges by municipality

	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	38%	35%	40%	39%	40%	43%	48%	25%	41%
Fixed Voice	45%	44%	44%	32%	61%	36%	43%	43%	64%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Fixed Voice n=273.

Percentage of respondents who have good value perceptions on the costs of the services.

Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Overall, the survey results show that customers of Ooredoo Qatar Q.P.S.C are more likely than customers of Vodafone Qatar P.Q.S.C to have good value perceptions on the international call charges for both mobile and fixed voice services. See Table 78.

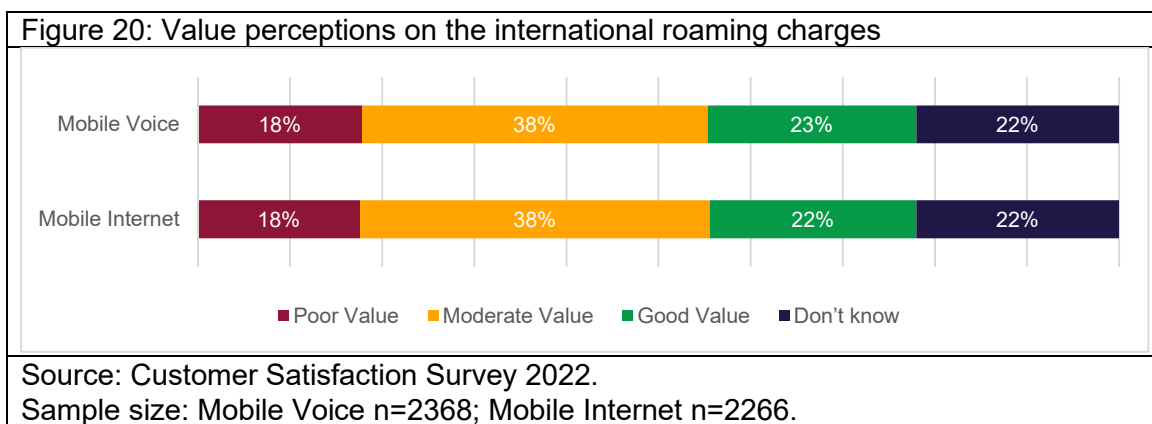
Table 78: Value perceptions on the international call charges by service provider

	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	38%	42%	32%
Fixed Voice	45%	46%	38%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Fixed Voice n=273.
Percentage of respondents who have good value perceptions on the costs of the services.

3.6.5 International roaming charges

Respondents who use mobile services were also asked to indicate their value perceptions on the international roaming charges. One in five respondents has good value perception on the international roaming charges for both voice and internet services while almost four in ten respondents have moderate perceptions. See Figure 20.



Overall, females using mobile services are more likely than men to have good value perceptions on the international roaming charges. The proportion of respondents who have a good value perception on international roaming charges is also higher amongst Qatari nationals when compared to the non-Qataris. See Tables 79 and 80.

Table 79: Value perceptions on the international roaming charges by gender			
	Results at the total sample level	Males	Females
Mobile Voice	23%	19%	34%
Mobile Internet	22%	20%	30%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have good value perceptions on the costs of the services.

Table 80: Value perceptions on the international roaming charges by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	23%	34%	20%
Mobile Internet	22%	29%	21%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have good value perceptions on the costs of the services.

The results by age group show that people aged above 44 years old, and the younger age group (15-24 years) are the most likely to have good value perceptions on the international roaming charges while the adults aged between 25 and 34 years are the least likely to have good value perceptions (17% for mobile voice and 16% for mobile internet). See Table 81.

Table 81: Value perceptions on the international roaming charges by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	23%	32%	17%	22%	31%	28%
Mobile Internet	22%	29%	16%	22%	29%	31%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have good value perceptions on the costs of the services.

Al Wakra records the highest proportion of residents who have good value perceptions on international roaming charges for mobile voice services at 32%, followed by Al Sheehaniya (24%), and Al Rayyan (23%), while Al Shamal records the lowest proportion of 9%. Al Daayen records the highest proportion of residents who have good value perceptions on international roaming charges for mobile internet services at 32%, followed by Al Wakra (29%), and Al Sheehaniya (28%), while Al Shamal records the lowest proportion of 13%.

Table 82: Value perceptions on the international roaming charges by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	23%	22%	23%	32%	17%	18%	9%	14%	24%
Mobile Internet	22%	22%	21%	29%	16%	17%	13%	32%	28%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have good value perceptions on the costs of the services.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Table 83 shows the proportion of users of mobile services who have good value perceptions on international roaming charges for each service provider. It is observed that there is only a slight difference between the two service providers with slightly higher proportions for Ooredoo Qatar Q.P.S.C.

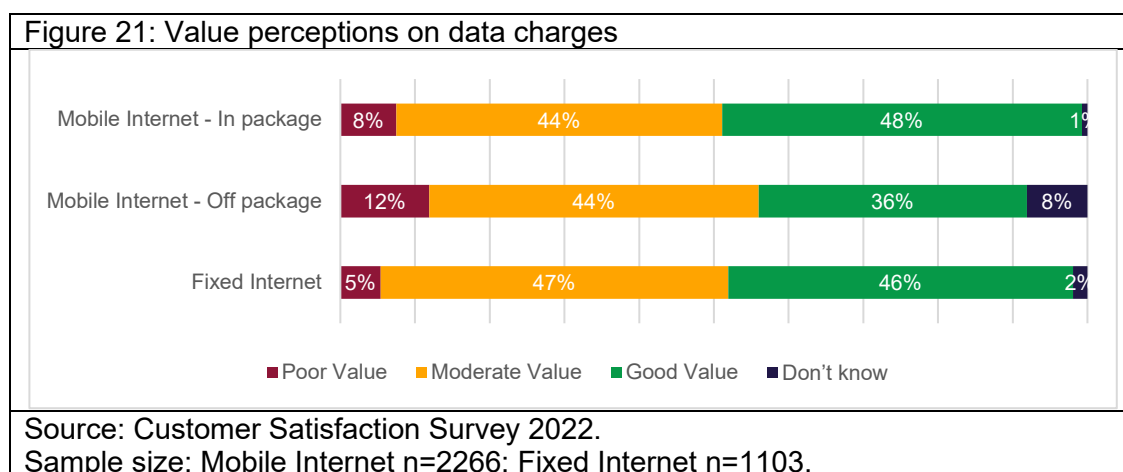
Table 83: Value perceptions on the international roaming charges by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	23%	24%	21%
Mobile Internet	22%	23%	22%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have good value perceptions on the costs of the services.

3.6.6 Data charges

Users of internet services, both mobile and fixed, were asked to rate their value perceptions on data charges. The results show that 48% of the users of mobile internet packages have good value perceptions on data charges while 36% of users of mobile internet off package services have good value perceptions. For the fixed internet users, 46% of them have good perceptions on data charges. Four in ten users of internet services have moderate value perceptions on data charges in general. See Figure 21.



Female respondents have more positive perceptions on data charges compared to men and the highest proportion is observed for females who use mobile internet services in packages. The proportion of Qatari nationals who have good value perceptions on data charges is also higher than the proportion of non-Qataris for all internet services. See Tables 84 and 85.

Table 84: Value perceptions on data charges by gender			
	Results at the total sample level	Males	Females
Mobile Internet – In package	48%	45%	58%
Mobile Internet – Off package	36%	32%	47%
Fixed Internet	46%	43%	56%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.

Table 85: Value perceptions on data charges by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Internet – In package	48%	69%	42%
Mobile Internet – Off package	36%	52%	31%
Fixed Internet	46%	65%	38%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.

Overall, surveyed adults aged between 25 and 34 years old are the least likely to have good value perceptions on data charges for any type of internet services with the lowest proportion recorded for mobile internet off package services at 28%. See Table 86.

Table 86: Value perceptions on data charges by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Internet – In package	48%	55%	40%	51%	56%	50%
Mobile Internet – Off package	36%	45%	28%	35%	44%	53%
Fixed Internet	46%	61%	41%	44%	48%	51%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.

Al Sheehaniya records the highest proportions of internet users who have good value perceptions on data charges with the highest score recorded for the fixed internet services (74%), followed by mobile internet in-package services (61%), then the mobile internet off-package services (49%). Al Daayen records the lowest proportions for fixed internet and mobile

internet in-package services while Doha records the lowest proportion for mobile internet off-package services.

Table 87: Value perceptions on data charges by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Internet – In package	48%	46%	48%	48%	56%	57%	50%	38%	61%
Mobile Internet – Off package	36%	32%	37%	40%	35%	36%	33%	39%	49%
Fixed Internet	46%	49%	43%	46%	47%	39%	60%	37%	74%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Overall, Ooredoo Qatar Q.P.S.C customers have more positive value perceptions on data charges when compared to customers of Vodafone Qatar P.Q.S.C. The largest difference between the two service providers is observed for the mobile internet in-package services. See Table 88.

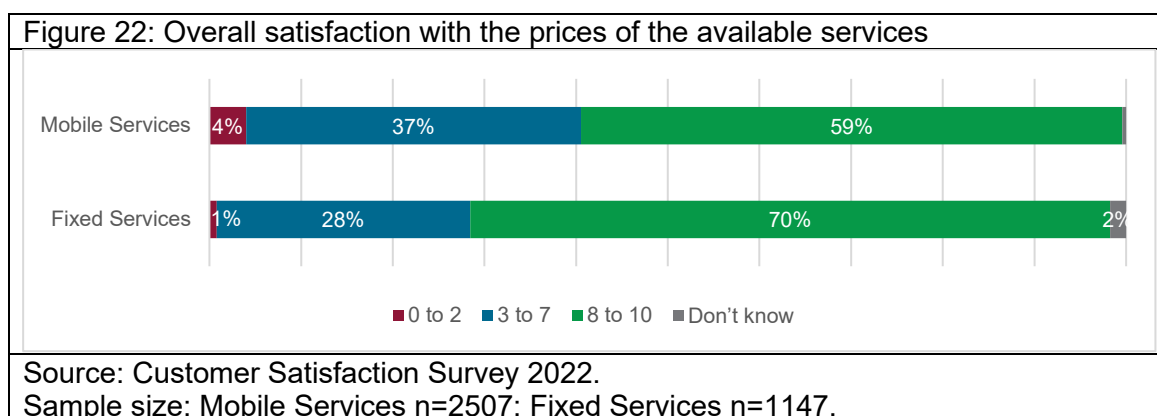
Table 88: Value perceptions on data charges by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Internet – In package	48%	53%	42%
Mobile Internet – Off package	36%	38%	33%
Fixed Internet	46%	47%	42%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Internet n=2266; Fixed Internet n=1103.
Percentage of respondents who have good value perceptions on the costs of the services.

3.6.7 The prices / costs of the available services overall

All users of fixed and or mobile services (including voice and internet) were asked to rate their satisfaction with the prices of the available services. Overall, respondents are more satisfied with fixed services than with mobile services as seven in ten of them rated their satisfaction with the prices of the available fixed services between '8' and '10' compared to over a half for users of mobile services. See Figure 22.



Two thirds of the surveyed women are highly satisfied with the prices of the available mobile services compared to over a half of males. Satisfaction with prices of available fixed services seem to be more balanced between the genders with 73% for females and 69% for males. In general, Qatari nationals seem to be more satisfied with the prices of both mobile and fixed services as shown in Table 90.

Table 89: Overall satisfaction with the prices of the available services by gender

	Results at the total sample level	Males	Females
Mobile Services	59%	56%	67%
Fixed Services	70%	69%	73%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Services n=2507; Fixed Services n=1147.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 90: Overall satisfaction with the prices of the available services by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Services	59%	74%	55%
Fixed Services	70%	78%	66%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Services n=2507; Fixed Services n=1147.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Age group 25-34 years record the lowest proportion for respondents who rate their satisfaction with the prices of mobile services from '8' to '10' (51%). And age group 45-54 years records the highest proportion for respondents who rate their satisfaction with the prices of both mobile and fixed services from '8' to '10' (71% and 76% respectively). See Table 91.

Table 91: Overall satisfaction with the prices of the available services by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Services	59%	62%	51%	60%	71%	66%
Fixed Services	70%	71%	68%	68%	76%	70%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Services n=2507; Fixed Services n=1147.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

The municipality of Al Khor records the highest proportion of respondents who rate their satisfaction with the prices of mobile services between '8' and '10' (73%), followed by Al Sheehaniya (69%), Al Shamal (67%), Al Daayen (61%), Al Wakra (61%), and Umm Slal (60%). For the satisfaction with the prices of the fixed services, the municipality of Al Sheehaniya records the highest score at 94%, followed by Al Khor (84%) and Al Shamal (76%). See Table 92.

Table 92: Overall satisfaction with the prices of the available services by municipality

	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Services	59%	56%	58%	61%	60%	73%	67%	61%	69%
Fixed Services	70%	71%	67%	62%	67%	84%	76%	60%	94%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Services n=2507; Fixed Services n=1147.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

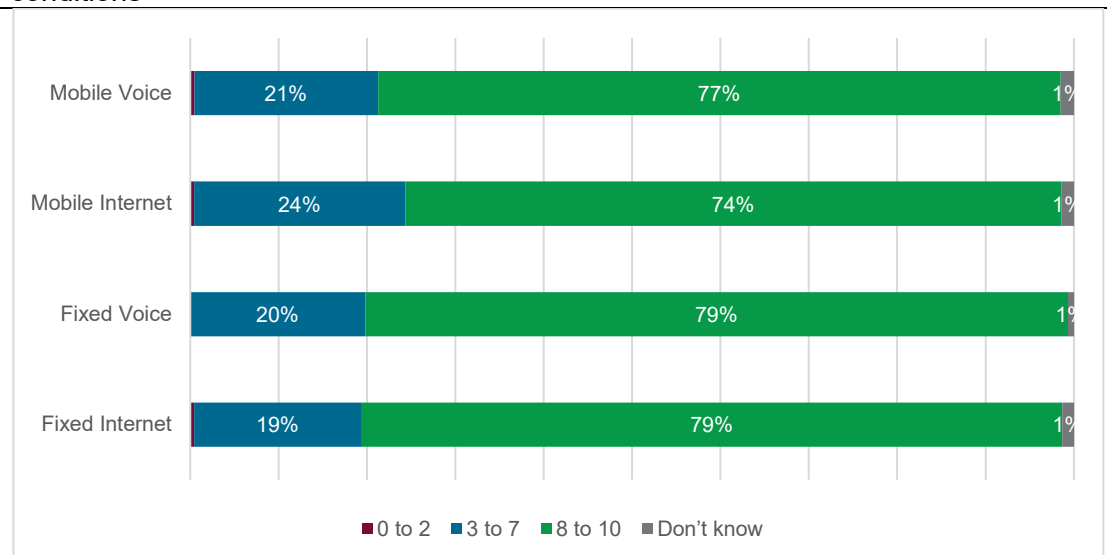
3.7 Customers' perceptions on rate plans and tariffs

3.7.1 Ease of understanding the service terms and conditions

Respondents were asked about their satisfaction with the ease of understanding the service terms and conditions of their providers. Satisfaction score on the ease of understanding the service terms and conditions for their mobile voice is at 77%. 35% of which have a rating of 10. Meanwhile, satisfaction on ease of understanding the service terms and conditions for mobile internet is slightly lower at 74% with 30% giving a rating of 10. See Figure 23.

Fixed services show higher satisfaction ratings over mobile services on ease of understanding the service terms and conditions with each fixed voice and fixed internet having a satisfaction score of 79%. However, in terms of extreme satisfaction scores, fixed services show a wide gap between fixed voice and fixed internet. While 43% have given a rating of 10 on how easy it is to understand the service conditions of their fixed voice service, only 27% have the same rating for their fixed internet.

Figure 23: Satisfaction with the ease of understanding the service terms and conditions



Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Males generally show higher satisfaction on the ease of understanding the service terms and conditions versus females. The same goes true for Qatari nationals who have significantly higher satisfaction scores than non-Qatari nationals. See Tables 93 and 94.

Females and Non-Qatari Nationals show slightly lower than the overall satisfaction score (75% vs. 77%) on the ease of understanding the terms and conditions of their mobile voice. The same observation could also be found about their satisfaction with ease of understanding for their mobile internet. While males (75% vs. 74%) and Qatari nationals (83% vs. 74%) show higher than the overall scores on the mobile internet, their counterparts show otherwise (females 72% vs. 74%; non-Qatari nationals 72% vs. 74%).

The same trend is followed for the fixed voice and fixed internet services. Males and Qatari nationals show higher satisfaction scores than the overall while females and non-Qatari nationals have generally lower satisfactions compared with the overall. Non-Qatari nationals are the least satisfied on the ease of understanding the terms and conditions of their fixed voice (71%) while females are least satisfied with their fixed internet (75%).

Table 93: Satisfaction with the ease of understanding the service terms and conditions by gender

	Results at the total sample level	Males	Females
Mobile Voice	77%	78%	75%
Mobile Internet	74%	75%	72%
Fixed Voice	79%	83%	73%
Fixed Internet	79%	81%	75%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 94: Satisfaction with the ease of understanding the service terms and conditions by nationality

	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	77%	86%	75%
Mobile Internet	74%	83%	72%
Fixed Voice	79%	86%	71%
Fixed Internet	79%	83%	78%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

By age group, older respondents (45 years and above) tend to show higher than the overall satisfaction scores while the youngest age group (15-24 years) show relatively lower scores across all services except the fixed internet (80% vs. 79%). See Table 95.

Satisfaction on the ease of understanding the terms and conditions of the mobile voice is highest among the 55+ years (81%) but lowest among the 15-24 years (70%) while satisfaction on the ease of understanding for the mobile internet is highest among the 45-54 years (82%) and lowest among the 15-24 years (65%). Meanwhile, for the fixed voice, satisfaction on ease of understanding the terms and conditions is highest among the 55+ years (90%) followed by the 45-54 years (86%). However, the 15-24 years are the least satisfied (66%) followed by the 34-

44 years (70%) when it comes to the fixed voice service. On the other hand, most consumers in each age group are satisfied with the ease of understanding the terms and conditions of their fixed internet as most age groups show higher than the overall satisfaction score (15-24 – 80%; 25-34 – 83%; 45-54 – 80%; 55+ - 82% vs. 79%) except the 35-44 years (75% vs. 80%).

Table 95: Satisfaction with the ease of understanding the service terms and conditions by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	77%	70%	76%	80%	78%	81%
Mobile Internet	74%	65%	73%	74%	82%	80%
Fixed Voice	79%	66%	84%	70%	86%	90%
Fixed Internet	79%	80%	83%	75%	80%	82%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

In terms of satisfaction with the ease of understanding the service terms and conditions by municipality, most municipalities would have parity or above the overall satisfaction rating on their mobile voice except in Al Wakra where satisfaction is lowest at 61%. See Table 96.

Meanwhile, varying satisfaction scores could be observed for the mobile internet. Higher than overall score can be noted in areas like Doha (77%), Al Khor & Al Thakhira (83%) and Al Sheehaniya (94%) while areas like Al Rayyan (72%), Al Wakra (59%), Umm Slal (73%) and Al Daayen (67%) show lower satisfactions than the overall. Al Wakra (59%) and Al Daayen (67%) show the lowest satisfactions scores when it comes to the ease of understanding the service terms and conditions of their mobile internet.

For fixed voice services, satisfaction ratings on the ease of understanding the service terms and conditions are higher than overall in Doha (82%), Umm Slal (87%), A Khor & Al Thakira (93%), Al Daayen (89%) and Al Sheehaniya (92%). However, it is the opposite case in areas like Al Wakra (59%) and Al Daayen (67%) where satisfaction scores are relatively lower than the overall (74%). Similarly, satisfaction scores on the ease of understanding the service terms and conditions for fixed internet vary by area. Al Sheehaniya (93%), Al Khor & Al Thakhira (86%),

Doha (81%) and Al Shamal (80%) show higher scores than the overall (79%) while Al Rayyan (78%), Umm Slal (77%), Al Daayen (76%) and Al Wakra (69%) show lower scores with the latter having the least satisfaction rating.

Table 96: Satisfaction with the ease of understanding the service terms and conditions by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	77%	77%	77%	61%	86%	86%	87%	77%	92%
Mobile Internet	74%	77%	72%	59%	73%	83%	74%	67%	94%
Fixed Voice	79%	82%	76%	50%	87%	93%	57%	89%	92%
Fixed Internet	79%	81%	78%	69%	77%	86%	80%	76%	93%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Looking at consumers' satisfaction with the ease of understanding the service terms and conditions by service provider, Ooredoo Qatar Q.P.S.C outperforms Vodafone Qatar P.Q.S.C as it rates above the overall satisfaction scores across all services. The widest gap between the two service providers can be seen on the fixed internet (81% vs. 71%). See Table 97.

Table 97: Satisfaction with the ease of understanding the service terms and conditions by service provider

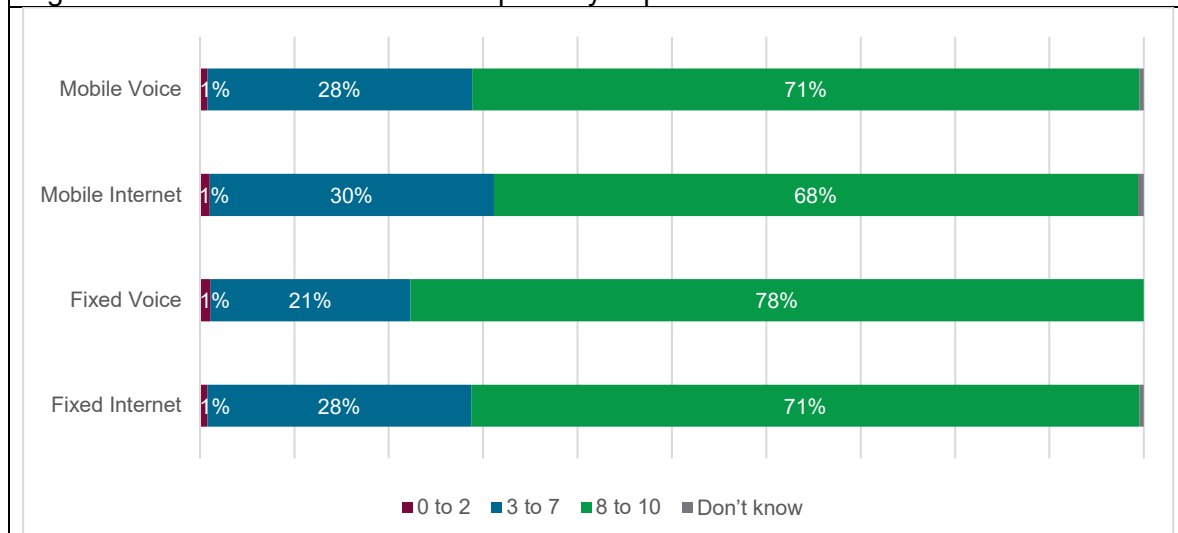
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	77%	78%	76%
Mobile Internet	74%	75%	73%
Fixed Voice	79%	80%	78%
Fixed Internet	79%	81%	71%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.7.2 Transparency of prices

Respondents were asked about their satisfaction with the transparency of prices of their service providers. Satisfaction score is highest on the fixed voice service at 78% with 37% giving a score of 10. Following behind are mobile voice (71%) and fixed internet (71%). The lowest satisfaction score is on mobile internet where only 68% claim they are satisfied with the transparency of prices for this service.

Figure 24: Satisfaction with the transparency of prices



Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Satisfaction with the transparency of prices by gender shows mostly favorable scores among

the females vs. the males except for the fixed voice service (76% vs. 79%). Females also show above than average on mobile voice (74% vs. 71%), mobile internet (70% vs. 68%) and fixed internet (75% vs. 71%). Meanwhile, males have lower than the overall scores in services like mobile voice (70% vs. 71%) and fixed internet (69% vs. 71%). See Table 98.

Across all services, Qatari nationals show higher ratings than overall satisfaction scores. Highest satisfaction scores among Qatari nationals are on the fixed service at 86% (vs. 78% overall score) and mobile voice at 84% (vs. 71% overall score). On the other hand, non-Qatar nationals show generally lower satisfaction scores. Satisfaction on the transparency of prices for mobile internet is lowest at 65% followed by fixed internet (67%), mobile voice (68%) and fixed voice (69%).

Table 98: Satisfaction with the transparency of prices by gender			
	Results at the total sample level	Males	Females
Mobile Voice	71%	70%	74%
Mobile Internet	68%	68%	70%
Fixed Voice	78%	79%	76%
Fixed Internet	71%	69%	75%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 99: Satisfaction with the transparency of prices by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	71%	84%	68%
Mobile Internet	68%	79%	65%
Fixed Voice	78%	86%	69%
Fixed Internet	71%	79%	67%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

In terms of satisfaction with the transparency of prices by age group, mobile voice tends to get a boost from the 15-24 years (72%), 35-44 years (72%) and the 45-54 years (77%) as they show higher ratings than the overall scores. However, satisfaction on mobile voice shows lower scores among the 25-35 (67%) and the 55+ years (69%). See Table 100.

Meanwhile, for the mobile internet, the older respondents show higher ratings than the overall satisfaction scores (45-54 years, 78%; 55+ years, 75%) while the younger age groups either show parity or lower scores than the overall. The lowest satisfaction on the mobile internet can be noted among the 25-34 years (65%) followed by the 34-44 years (66%). For fixed voice, except among the 45-54 years (83%), all other age groups show lower satisfaction ratings vs. the overall scores with the 15-24 years showing the lowest satisfaction at only 66%. Satisfaction with the transparency of prices on the fixed internet is highest among the 15-24 years (81%) but lowest among the 35-44 years (66%).

Table 100: Satisfaction with the transparency of prices by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	71%	72%	67%	72%	77%	69%
Mobile Internet	68%	68%	65%	66%	78%	75%
Fixed Voice	78%	66%	77%	77%	83%	77%
Fixed Internet	71%	81%	71%	66%	72%	76%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Satisfaction score with the transparency of prices by municipality is lowest in Al Wakra across all services with fixed voice having the least satisfaction score at only 46%. See Table 101.

In terms of mobile voice, satisfaction is highest in Al Sheehaniya (90%) followed by Al Shamal (83%) and Al Khor & Al Thakhira (79%) but is low in Al Daayen (52%). Umm Slal (62%) and Al Wakra (64%) and Al Rayyan. For mobile internet, consumers are most satisfied in areas like Al Sheehaniya (83%) and Doha (71%). However, consumers from areas such as Al Shamal (57%), Al Wakra (59%), Umm Slal (59%), Al Daayen (63%) and Al Rayyan (67%) show lower satisfactions scores compared with the overall satisfaction score for mobile internet. For fixed

voice, most areas have higher than the overall score except Al Wakra (46%), Al Shamal (57%) and Doha (75%). Meanwhile, it is a different story for fixed internet. Apart from Al Sheehaniya (91%), Doha (78%) and Al Khor & Al Thakhira (74%), all other areas perform lower than the overall score for the fixed voice service.

Table 101: Satisfaction with the transparency of prices by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	71%	71%	69%	64%	62%	79%	83%	52%	90%
Mobile Internet	68%	71%	67%	59%	59%	69%	57%	63%	83%
Fixed Voice	78%	75%	88%	46%	87%	86%	57%	79%	91%
Fixed Internet	71%	78%	69%	61%	55%	74%	60%	59%	91%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

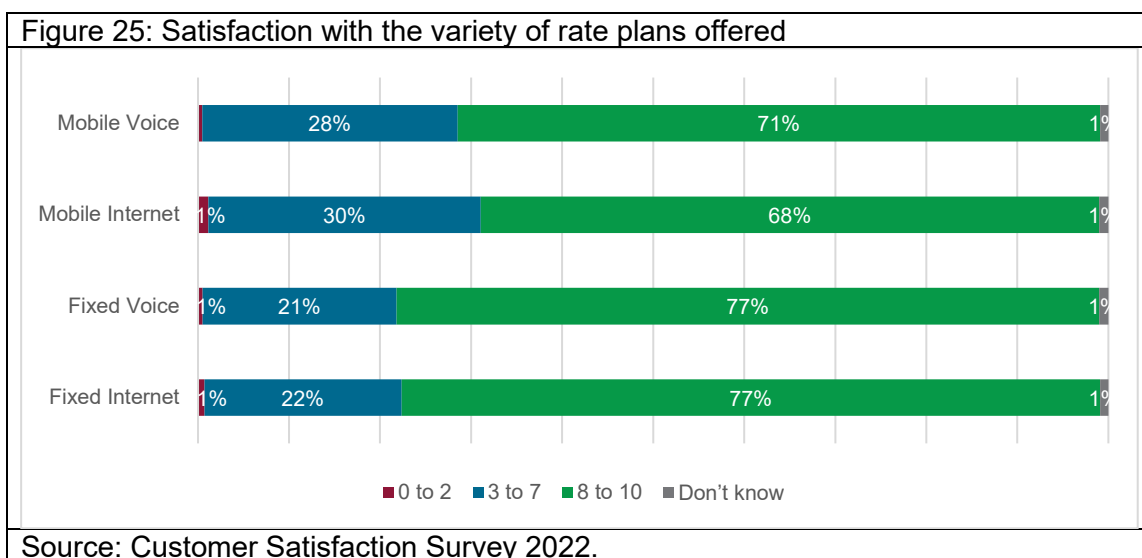
When asked about their satisfaction with the transparency of prices by service provider, consumers claim higher satisfaction on Ooredoo Qatar Q.P.S.C vs. Vodafone Qatar P.Q.S.C on mobile voice (74% vs. 67%), mobile internet (69% vs. 67%) and fixed internet which shows the highest gap between the two (73% vs. 59%). However, when it comes to fixed voice, both service providers show equal level of satisfaction at 78%.

Table 102: Satisfaction with the transparency of prices by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	71%	74%	67%
Mobile Internet	68%	69%	67%
Fixed Voice	78%	78%	78%
Fixed Internet	71%	73%	59%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.7.3 Variety of rate plans offered

Respondents were asked about their satisfaction with the variety of rate plans offered by their service providers. Consumers are generally more satisfied with the fixed services compared with the mobile services. Satisfaction with fixed voice services is at 77%. Fixed internet also shows a satisfaction rating of 77%. However, satisfaction with the variety of rate plans offered for mobile voice is lower at 71%. Mobile internet even has a lower score at 68%. Fixed voice receives the highest score for Extreme Satisfaction with the variety of rate plans offered at 39% followed by mobile voice at 27% and fixed internet at 26%. See Figure 25.



Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Satisfaction with the variety of rate plans offered by gender show higher scores among males vs. females across all services except the mobile internet (67% vs. 70%). Males also have higher satisfaction scores on fixed services vs. mobile services. Meanwhile, between Qatari nationals and non-Qatari nationals, the former is likely to show significantly higher scores vs. the latter and even against the overall scores across all services. Mobile voice (83% vs. 67%) and fixed voice (83% vs. 63%) have the biggest gaps against non-nationals. See Tables 103 and 104.

Table 103: Satisfaction with the variety of rate plans offered by gender			
	Results at the total sample level	Males	Females
Mobile Voice	71%	71%	69%
Mobile Internet	68%	67%	70%
Fixed Voice	77%	78%	75%
Fixed Internet	77%	77%	76%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 104: Satisfaction with the variety of rate plans offered by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	71%	83%	67%
Mobile Internet	68%	79%	65%
Fixed Voice	77%	83%	70%
Fixed Internet	77%	81%	75%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

When it comes to satisfaction with the variety of rate plans offered by age group, the 45-54 years segment show above average scores across services compared with the other age groups. See Table 105.

For mobile voice, satisfaction is highest among the 45-54 years (76%) followed by the 35-44 years (74%). However, lower than the overall score can be noted among the 15-24 years (68%), 25-34 years (67%) and the 55+ years (69%). On the other hand, satisfaction for mobile internet is highest among the older age groups (45-54, 75% and 55+ years 76%) but lowest among the 25-34 years. For fixed voice, the 55+ years (85%), 44-54 years (80%) and the 25-34 years (80%) show higher than overall satisfaction score compared with the 15-24 years (61%) and 34-44 years (74%) who tend to score lower across other age groups. For fixed internet, most age groups show parity or higher than overall scores except for the 45-54 years with 76% satisfaction score.

Table 105: Satisfaction with the variety of rate plans offered by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	71%	68%	67%	74%	76%	69%
Mobile Internet	68%	68%	64%	68%	75%	76%
Fixed Voice	77%	61%	80%	74%	80%	85%
Fixed Internet	77%	77%	78%	75%	76%	81%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Looking at the Satisfaction with the variety of rate plans offered by municipality, consumers in Al Sheehaniya and Al Khor & Al Thakhira show the highest satisfaction on mobile voice (91% and 83% respectively) and mobile internet (92% and 73% respectively). However, lower satisfaction on the mobile voice can be noted among consumers in Al Wakra (56%) and Doha (68%). Satisfaction with the variety of rate plans offered is also lower in areas like Al Wakra (56%), Al Daayen (60%), Al Shamal (65%) and Umm Slal (66%). For fixed voice higher scores can be observed among consumers in Al Sheehaniya (92%), Al Daayen (85%), Umm Slal (83%), Al Rayyan (82%) and Doha (80%) while consumers in Al Wakra show the lowest satisfaction at

42%. For fixed internet, consumers in Al Khor & Al Thakhira show the highest satisfaction at 86% while consumers in Al Wakra (66%) and Al Shamal (67%) have the lowest satisfaction scores compared with other consumers in other areas. See Table 106.

Table 106: Satisfaction with the variety of rate plans offered by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	71%	68%	72%	56%	72%	83%	74%	71%	91%
Mobile Internet	68%	69%	68%	56%	66%	73%	65%	60%	92%
Fixed Voice	77%	80%	82%	42%	83%	71%	57%	85%	92%
Fixed Internet	77%	81%	73%	66%	82%	86%	67%	71%	85%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

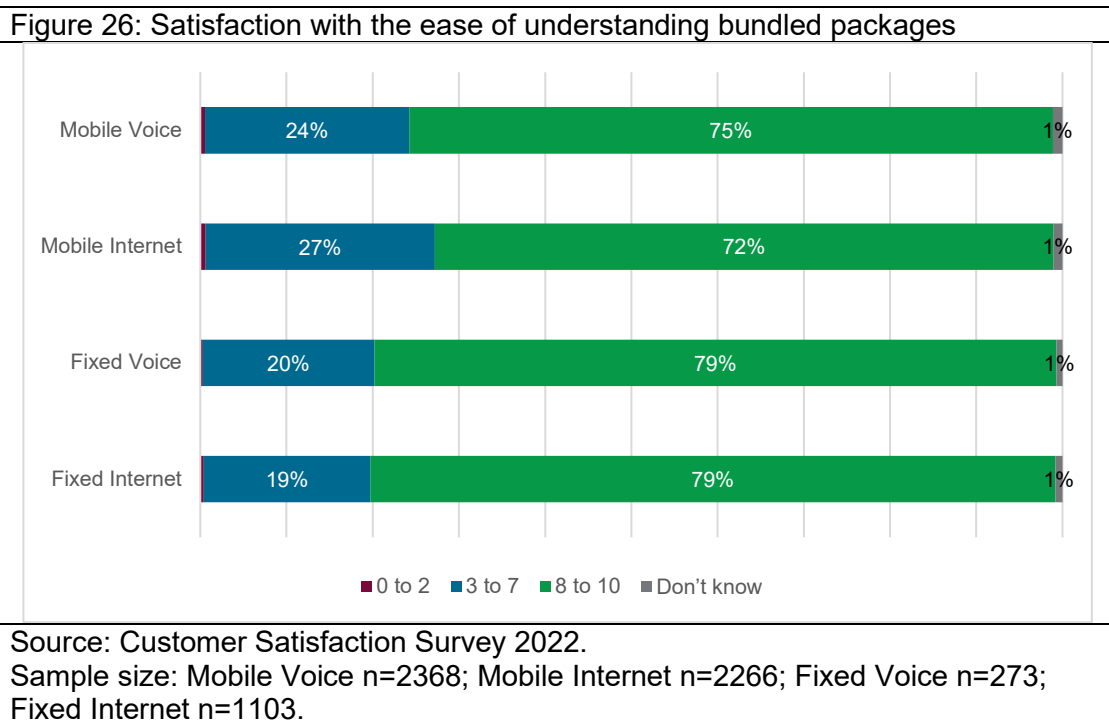
When asked about their satisfaction with the variety of rate plans offered by service provider, consumers generally show more favorable satisfaction scores for Ooredoo Qatar Q.P.S.C vs. Vodafone Qatar P.Q.S.C across all services. The biggest gap in satisfaction scores can be noted in the fixed internet (79% vs. 66%) followed by fixed voice (79% vs. 71%) and mobile voice (73% vs. 66%). See Table 107.

Table 107: Satisfaction with the variety of rate plans offered by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	71%	73%	66%
Mobile Internet	68%	70%	66%
Fixed Voice	77%	79%	71%
Fixed Internet	77%	79%	66%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.7.4 Ease of understanding bundled packages

Respondents were asked about their satisfaction with the ease of understanding the bundled packages of their service providers. Overall, consumers show higher satisfaction with the ease of understanding the bundled packages of fixed services. Fixed voice and fixed internet both received a satisfaction rating of 79% while mobile voice followed behind at 75% and mobile internet at 72%. The survey results show that 41% of consumers pose Extreme Satisfaction with the ease of understanding the bundled packages of fixed voice services while only 25% claim the same for mobile internet services. See Figure 26.



In terms of satisfaction with the ease of understanding bundled packages by gender, males generally show higher satisfaction than females except for mobile internet (71% vs. 73%). Highest satisfaction among males can be noted in both fixed voice (80%) and fixed internet (80%). However, the biggest gap in satisfaction rating between males and females is in the fixed voice service (80% vs. 76%). Looking at satisfaction with the ease of understanding bundled packages by nationality, Qatari nationals provide higher than the overall satisfaction scores across all services. They also tend to show significant gaps in satisfaction levels vs. non-Qatari nationals. Highest satisfaction among Qatari nationals is seen in the fixed voice service at 86%. However, versus non-Qatari nationals, the widest variance between the two segments can be noted in the mobile internet service (84% vs. only 68%). See Tables 108 and 109.

Table 108: Satisfaction with the ease of understanding bundled packages by gender			
	Results at the total sample level	Males	Females
Mobile Voice	75%	75%	72%
Mobile Internet	72%	71%	73%
Fixed Voice	79%	80%	76%

Fixed Internet	79%	80%	78%
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Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 109: Satisfaction with the ease of understanding bundled packages by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	75%	84%	72%
Mobile Internet	72%	84%	68%
Fixed Voice	79%	86%	71%
Fixed Internet	79%	85%	77%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Meanwhile, satisfaction with the ease of understanding bundled packages by age group show generally better scores among the older age groups. Oppositely, lower satisfaction ratings can be observed among the 15-24 years in almost all services except in the fixed internet service (81%). The segment noted its lowest satisfaction score in the fixed voice (56%) followed by the mobile internet (67%). See Table 110.

Table 110: Satisfaction with the ease of understanding bundled packages by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	75%	70%	73%	76%	80%	74%
Mobile Internet	72%	67%	70%	71%	80%	80%
Fixed Voice	79%	56%	82%	77%	82%	90%
Fixed Internet	79%	81%	81%	78%	78%	81%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Comparison of satisfaction with the ease of understanding bundled packages by municipality show better scores than the average in areas like Al Sheehaniya (94% vs. 75%), Al Khor & Ak Thakhira (88% vs. 75%) and Umm Slal (82% vs. 75%) for the mobile service. However, the municipality of Doha shows the lowest satisfaction on mobile voice at only 72%. For mobile internet, highest satisfaction scores on the ease of understanding bundled packages can be observed in areas like Al Sheehaniya (86%), Al Khor & Ak Thakhira (79%) and Al Shamal (78%). On the other hand, areas such as Al Daayen (66%) and Al Wakra (62%) show the lowest satisfaction scores. For fixed voice, most areas show above average scores except for Umm Slal (78%), Al Shamal (71%) and Al Wakra (38%) which has the lowest score for this service. Meanwhile, for fixed internet, only Al Rayyan (77%), Al Daayen (70%) and Al Wakra (62%) show below average satisfaction scores for the service. See Table 111.

Table 111: Satisfaction with the ease of understanding bundled packages by municipality

	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	75%	72%	75%	62%	82%	88%	74%	74%	94%
Mobile Internet	72%	72%	71%	61%	76%	79%	78%	66%	86%
Fixed Voice	79%	82%	81%	38%	78%	93%	71%	89%	91%
Fixed Internet	79%	83%	77%	62%	86%	87%	85%	70%	89%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

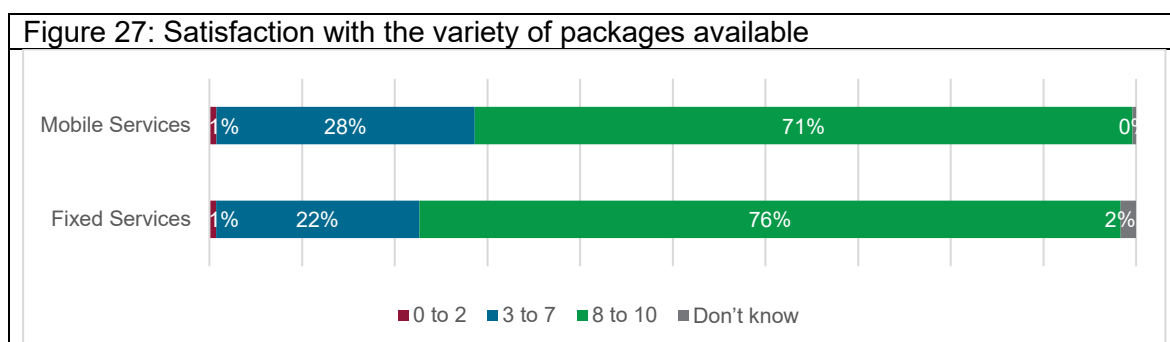
When asked about their satisfaction with the ease of understanding bundled packages by service provider, consumers generally appreciate Ooredoo Qatar Q.P.S.C better than Vodafone Qatar P.Q.S.C across all services. The biggest gap on satisfaction scores can be noted in the fixed internet where Ooredoo Qatar Q.P.S.C has higher than overall score (83% vs. 79%) while Vodafone Qatar P.Q.S.C only has a satisfaction score of 61%. See Table 112.

Table 112: Satisfaction with the ease of understanding bundled packages by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	75%	77%	72%
Mobile Internet	72%	74%	69%
Fixed Voice	79%	80%	73%
Fixed Internet	79%	83%	61%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.7.5 Variety of packages available overall

Respondents were asked about their satisfaction with the variety of packages available on the overall. Consumers generally favor the variety of packages available for fixed services vs. mobile services (76% vs. 71%). Nonetheless, Extreme Satisfaction between the two services is not too far apart (25% vs. 24%). See Figure 27.



Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Services n=2507; Fixed Services n=1147.

Satisfaction with the variety of packages available by gender show slightly higher than average score for mobile services among females (72% vs. 71%). Males, in the meantime, show a slightly lower score at 70%. However, for fixed services, males show parity satisfaction vis-à-vis the overall while females have slightly lower satisfaction at 74%. By nationality, Qatari nationals again show significantly higher satisfaction scores vs. non-Qatari nationals on both mobile services (82% vs. 68%) and fixed services (83% vs. 72%). Meanwhile, non-Qatari nationals show lower than the overall scores on mobile services (68% vs. 71%) and fixed services (72% vs. 76%). See Tables 113 and 114.

Table 113: Satisfaction with the variety of packages available by gender			
	Results at the total sample level	Males	Females
Mobile Services	71%	70%	72%
Fixed Services	76%	76%	74%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Services n=2507; Fixed Services n=1147.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 114: Satisfaction with the variety of packages available by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Services	71%	82%	68%
Fixed Services	76%	83%	72%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Services n=2507; Fixed Services n=1147.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Looking at the satisfaction with the variety of packages available by age group, younger age groups show lower satisfaction scores on mobile services vs. the overall and other age groups (15-24 years – 66%; 25-34 years – 66%). Meanwhile, for fixed services, only the 15-24 years (72% vs. 76%) and 35-44 years (74% vs. 76%) segments show lower satisfaction scores versus

the average. Other age segments perform slightly above the overall score. See Table 115.

Table 115: Satisfaction with the variety of packages available by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Services	71%	66%	66%	74%	80%	78%
Fixed Services	76%	72%	77%	74%	78%	77%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Services n=2507; Fixed Services n=1147.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

On the other hand, except for Doha (67%) and Al Wakra (68%), all other municipalities perform above average in terms of satisfaction with the variety of packages available for mobile services. Highest satisfaction for mobile services is noted in Al Sheehaniya (93%) followed by Al Khor & Al Thakhira (85%) and Al Daayen (79%). For fixed services, only Al Wakra (62%) and Al Rayyan (75%) show lower satisfaction scores vs. the overall. All other municipalities have mostly better scores than average with Al Shamal showing the highest satisfaction at 90% followed by Al Sheehaniya (88%) and Al Khor & Al Thakhira (87%). See Table 116.

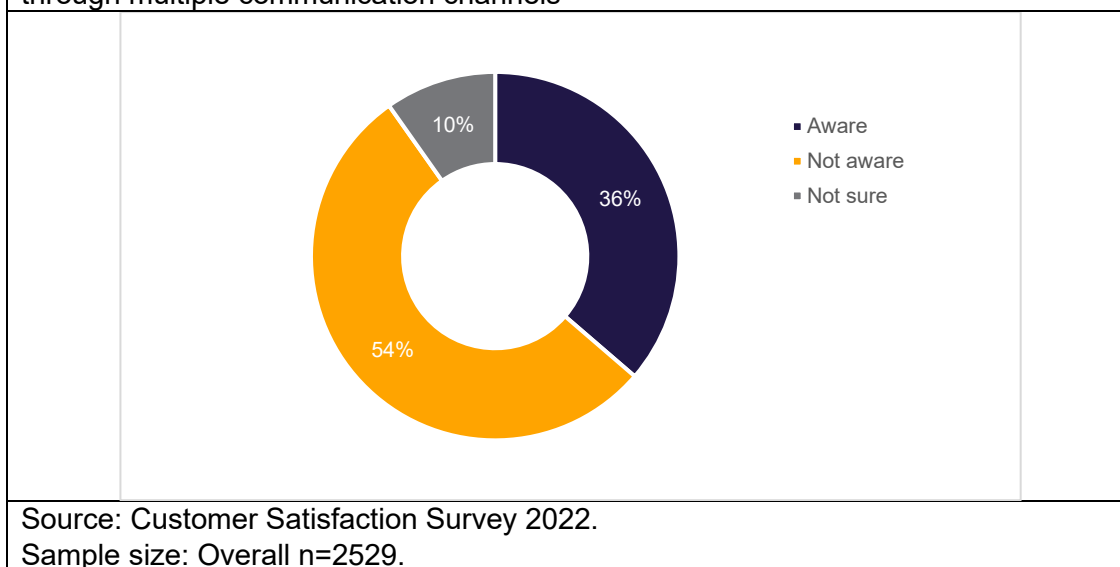
Table 116: Satisfaction with the variety of packages available by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Services	71%	67%	71%	62%	76%	85%	78%	79%	93%
Fixed Services	76%	76%	75%	62%	79%	87%	90%	65%	88%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Services n=2507; Fixed Services n=1147.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

3.7.6 Tariffs information

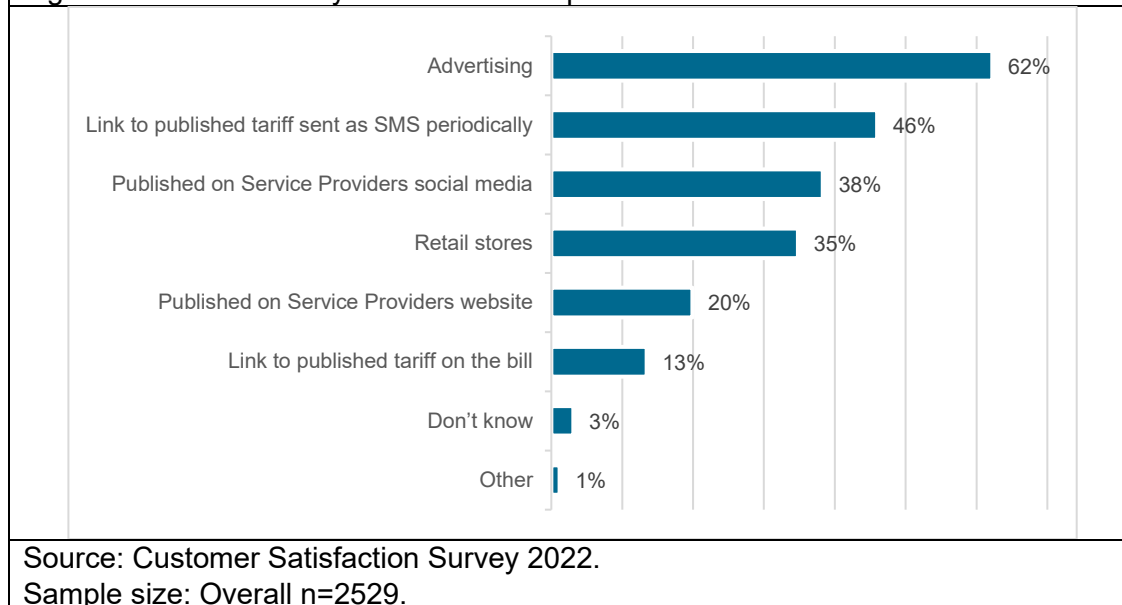
Respondents were asked if they were aware of service providers being required to publish their tariffs through multiple communication channels. Only 36% of consumers claim to be aware while more than half (54%) remain unaware of this requirement. Meanwhile, 10% say they are not sure of this requirement. See Figure 28.

Figure 28: Awareness of the service providers being required to publish their tariffs through multiple communication channels



In terms of preferred channels to access tariff plans, the majority of consumers favor advertising (62%) following far behind is a link to published tariff sent as SMS periodically (46%). Publishing via social media accounts of service providers is also a common access mode to 38% of consumers while 35% prefer the retail stores. Only 20% prefer the tariff plans to be published on the service providers website while the link to published tariff on the bill is even lower at 13%. See Figure 29.

Figure 29: Preferred ways to access tariff plans

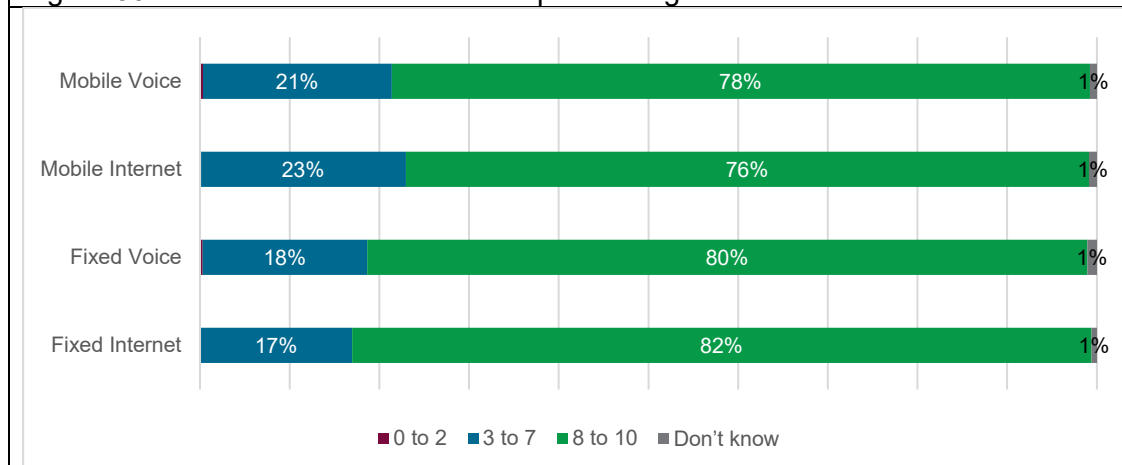


3.8 Customers' perceptions on provisioning

3.8.1 Ease of purchasing the services

Respondents were asked about their satisfaction with the ease of purchasing services from their providers. The highest satisfaction is noted for the fixed internet services (82%) followed by fixed voice at 80% and mobile voice at 78%. Lowest satisfaction on the mobile internet services at 76%. The results show that 42% of consumers gave a rating of 10 (Extremely Satisfied) on their satisfaction with the ease of purchasing fixed voice services while 32% of consumers said the same for their purchase experience on mobile internet services. See Figure 30.

Figure 30: Satisfaction with the ease of purchasing the services



Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273;
Fixed Internet n=1103.

Satisfaction with the ease of purchasing the services by gender show almost parity scores between males and females with only mobile voice showing a larger gap (79% vs. 75%). Consistently, Qatari nationals have higher satisfaction scores across all services vs. non-Qatari nationals. The biggest variance on satisfaction scores between locals and expatriates can be noted in the mobile internet services (87% vs. 73%) followed by fixed voice (86% vs. 74%). See Tables 117 and 118.

Table 117: Satisfaction with the ease of purchasing the services by gender			
	Results at the total sample level	Males	Females
Mobile Voice	78%	79%	75%
Mobile Internet	76%	76%	77%
Fixed Voice	80%	80%	79%
Fixed Internet	82%	83%	82%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 118: Satisfaction with the ease of purchasing the services by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	78%	87%	76%
Mobile Internet	76%	87%	73%
Fixed Voice	80%	86%	74%
Fixed Internet	82%	86%	81%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

In terms of satisfaction with the ease of purchasing the services by age group, the 45-54 years segment is the most satisfied across other age groups in the mobile services while the 55+ years segment tends to show the highest satisfaction ratings on fixed services. The 15-24 years segment has the lowest satisfaction on mobile voice (73%), mobile internet (73%), and fixed voice at only 63%. Meanwhile, the 35-44 years segment shows the lowest satisfaction with the fixed internet (79%). See Table 119.

Table 119: Satisfaction with the ease of purchasing the services by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	78%	73%	76%	80%	82%	76%
Mobile Internet	76%	73%	76%	75%	83%	76%
Fixed Voice	80%	63%	77%	77%	85%	97%
Fixed Internet	82%	80%	84%	79%	84%	89%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Looking at consumers' satisfaction with the ease of purchasing the services by municipality, consumers in Al Sheehaniya (91%), Al Khor & Al Thakhira (88%) and Al Shamal (83%) show above average satisfaction ratings on the mobile voice services while consumers in areas like Al Rayyan (76%) and Al Wakra (65%) end up with the lowest satisfaction scores, even showing below average scores. For the mobile internet services, higher than overall score can be noted in areas like Al Sheehaniya (90% vs. 76%), Doha (80% vs. 76%), Al Khor & Al Thakhira (79%) and Umm Slal (77% vs. 76%). However, low scores are registered in Al Wakra (68%) and Al Daayen (64%). Meanwhile, areas like Al Sheehaniya (100%), Al Khor & Al Thakhira (100%) and Al Daayen (100%) are highly satisfied with the fixed voice services. High satisfaction scores are also observed among consumers in Al Sheehaniya (100%), Al Shamal (95%) and Umm Slal (87%) for the fixed internet services. See Table 120.

Table 120: Satisfaction with the ease of purchasing the services by municipality

	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	78%	78%	76%	65%	81%	88%	83%	74%	91%
Mobile Internet	76%	80%	72%	68%	77%	79%	78%	64%	90%
Fixed Voice	80%	79%	76%	50%	78%	100%	86%	100%	100%
Fixed Internet	82%	84%	80%	75%	87%	86%	95%	67%	100%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Narrower gaps can be noted on the satisfaction of consumers with the ease of purchasing mobile services between Ooredoo Qatar Q.P.S.C and Vodafone Qatar P.Q.S.C (mobile voice – 79% vs. 76%; mobile internet – 78% vs. 73%). However, wider gaps are apparent between the fixed services of Ooredoo Qatar Q.P.S.C and Vodafone Qatar P.Q.S.C (fixed voice – 82% vs. 71%; fixed internet – 85% vs. 71%). See Table 121.

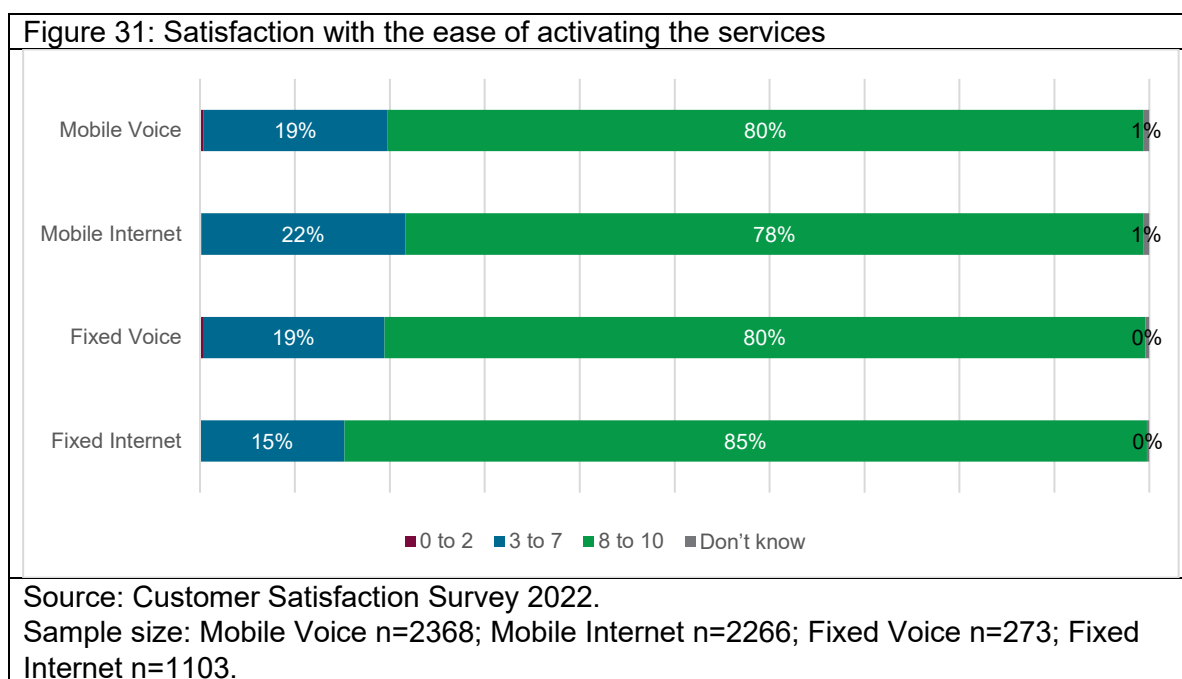
Table 121: Satisfaction with the ease of purchasing the services by service provider

	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	78%	79%	76%
Mobile Internet	76%	78%	73%
Fixed Voice	80%	82%	71%
Fixed Internet	82%	85%	71%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.8.2 Ease of activating the services

Respondents were asked about their satisfaction towards the ease of activating services from their providers. Consumers are satisfied most with the ease of activating the fixed internet services (85%) followed by mobile voice (80%) and fixed voice (80%). Satisfaction with the ease of activating mobile internet services is at 78%. See Figure 31.



Satisfaction on the ease of activating the services by gender show wider variance between males and females on the fixed voice service (83% vs. 76%) while Qatari nationals persistently show significantly higher satisfaction scores versus expatriates. The highest gap between nationalities can be noted in fixed voice (87% vs. 73%) and mobile internet (86% vs. 75%). See Tables 122 and 123.

Table 122: Satisfaction with the ease of activating the services by gender			
	Results at the total sample level	Males	Females
Mobile Voice	80%	80%	78%
Mobile Internet	78%	77%	79%
Fixed Voice	80%	83%	76%
Fixed Internet	85%	84%	85%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 123: Satisfaction with the ease of activating the services by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	80%	87%	78%
Mobile Internet	78%	86%	75%
Fixed Voice	80%	87%	73%
Fixed Internet	85%	91%	82%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

The 45-54 years (85%) and 35-44 years (82%) are the most satisfied with the ease of activating their mobile voice service while the 15-24 years are the least satisfied at 71%. In terms of ease of activating their mobile internet service, the 45-54 years are the most satisfied (84%) while the 15-24 years are the least happy. For fixed voice services, the highest satisfaction with ease of activating the service is noted among the 55+ years (97%) and the lowest is among the 15-24 years at only 66%. Meanwhile, the ease of activating the fixed internet is significantly highest among the 55+ years (91%) and lowest among the 35-44 years (81%). See Table 124.

Table 124: Satisfaction with the ease of activating the services by age group

	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	80%	71%	79%	82%	85%	78%
Mobile Internet	78%	73%	78%	76%	84%	81%
Fixed Voice	80%	66%	78%	77%	83%	97%
Fixed Internet	85%	82%	86%	81%	88%	91%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Generally, consumers in Al Sheehaniya show highest satisfaction with the ease of activating mobile voice (91%), mobile internet (88%) and fixed internet (93%) services. Meanwhile, ease of activating fixed voice is highly appreciated by consumers in Al Shamal (100%) and Al Daayen (93%). On the other hand, consumers in Al Wakra have consistently shown low satisfaction scores on the ease of activating their mobile voice (67%), mobile internet (69%), and fixed voice (50%) services. Consumers in Al Daayen have also noted the lowest satisfaction score in fixed internet (78%). See Table 125.

Table 125: Satisfaction with the ease of activating the services by municipality

	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	80%	80%	79%	67%	84%	88%	83%	77%	91%
Mobile Internet	78%	82%	75%	69%	76%	78%	83%	65%	88%
Fixed Voice	80%	82%	78%	50%	83%	86%	100%	93%	91%
Fixed Internet	85%	86%	82%	80%	88%	88%	95%	78%	93%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Similarly, consumers show higher satisfaction for Ooredoo Qatar Q.P.S.C vis-a-vis Vodafone Qatar P.Q.S.C across all services. Highest gaps can be noted in the ease of activating fixed voice services (83% vs. 67%) and fixed internet (87% vs. 71%). See Table 126.

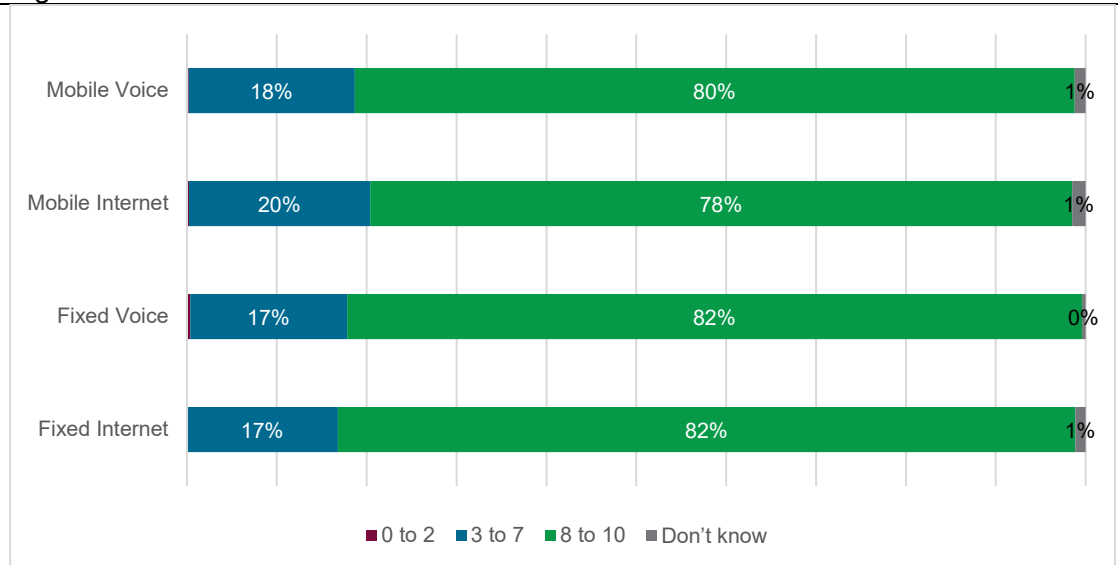
Table 126: Satisfaction with the ease of activating the services by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	80%	81%	78%
Mobile Internet	78%	80%	75%
Fixed Voice	80%	83%	67%
Fixed Internet	85%	87%	71%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.8.3 Time taken for the service to be activated

Respondents were asked about their satisfaction with the time taken for the service to be activated. Fixed services tend to show higher satisfaction scores compared with mobile services – fixed voice (82%) vs. mobile notes (80%); fixed internet (82%) vs. mobile internet (78%). See Figure 32.

Figure 32: Satisfaction with the time taken for the service to be activated



Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Satisfaction with the time taken for the service to be activated show minimal differences between males and females except for the fixed voice service where satisfaction scores have slightly wider gaps between the gender segments (83% vs. 79%). Wider gaps on satisfaction scores between Qatari nationals and non-Qatari nationals can be noted in the fixed services – fixed voice 90% vs. 72% and fixed internet 90% vs. 79%. See Tables 127 and 128.

Table 127: Satisfaction with the time taken for the service to be activated by gender			
	Results at the total sample level	Males	Females
Mobile Voice	80%	80%	79%
Mobile Internet	78%	78%	78%
Fixed Voice	82%	83%	79%
Fixed Internet	82%	82%	83%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 128: Satisfaction with the time taken for the service to be activated by nationality

	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	80%	88%	78%
Mobile Internet	78%	86%	76%
Fixed Voice	82%	90%	72%
Fixed Internet	82%	90%	79%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

The 45-54 years are the most satisfied with the time taken for their mobile voice service to be activated (86%) while the least satisfied are the 15-24 years (71%). For the mobile internet, the 45-54 years again show the highest satisfaction at 84% as the 15-24 years show the lowest satisfaction at 67%. For fixed services, the 55+ years show the highest appreciation for the time taken for the service to be activated (98%) while the youngest age group show the least satisfaction at only 66%. For the fixed internet, the 55+ years consistently show the highest rating at 89% while the 35-44 years show the lowest rating at only 79%. See Table 129.

Table 129: Satisfaction with the time taken for the service to be activated by age group

	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	80%	71%	81%	80%	86%	83%
Mobile Internet	78%	67%	80%	76%	84%	83%
Fixed Voice	82%	66%	79%	77%	87%	98%
Fixed Internet	82%	80%	84%	79%	84%	89%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Looking at the satisfaction with the time taken for the service to be activated by municipality, Al Sheehaniya (96%), Al Shamal (91%), and Al Khor & Al Thakhira (90%) show the best scores for the mobile voice services, but the lowest ones are noted in Al Daayen (62%) and Al Wakra (69%). For mobile internet services, the highest scores mirror the same areas such as Al Sheehaniya (93%) and Al Shamal (92%) while the lowest scores are also reflected in Al Daayen (63%) and Al Wakra (66%). Meanwhile, for fixed voice services, consumers in Al Shamal (100%), Al Khor & Al Thakhira (100%) and Umm Slal (91%) have high scores on their satisfaction. Fixed internet is also mostly appreciated by consumers in Al Shamal (100%) and Al Sheehaniya (91%). See Table 130.

Table 130: Satisfaction with the time taken for the service to be activated by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	80%	82%	77%	69%	81%	90%	91%	62%	96%
Mobile Internet	78%	82%	76%	66%	78%	79%	92%	63%	93%
Fixed Voice	82%	81%	81%	56%	91%	100%	100%	89%	82%
Fixed Internet	82%	86%	76%	83%	86%	83%	100%	73%	91%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

On the other hand, when it comes to satisfaction with the time taken for the service to be activated, gaps between Ooredoo Qatar Q.P.S.C and Vodafone Qatar P.Q.S.C are not big except in the fixed internet service where Ooredoo Qatar Q.P.S.C significantly outperformed Vodafone Qatar P.Q.S.C (85% vs. 66%). See Table 131.

Table 131: Satisfaction with the time taken for the service to be activated by service provider

	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	80%	83%	76%
Mobile Internet	78%	79%	76%
Fixed Voice	82%	82%	79%
Fixed Internet	82%	85%	66%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

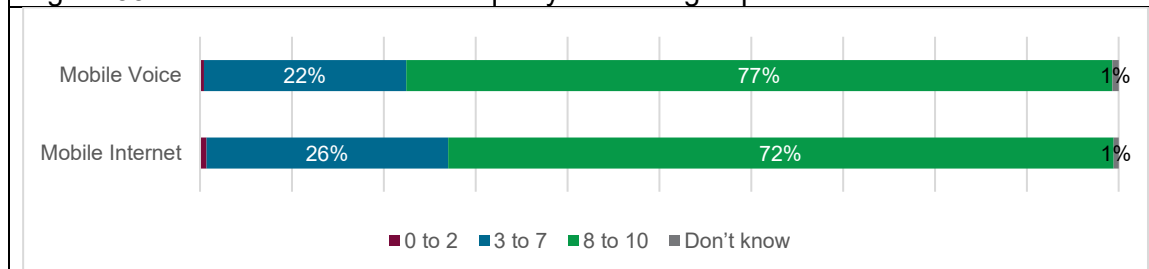
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.9 Customers' perceptions on recharge, billing and payment

3.9.1 Adequacy of recharge options

Respondents were asked about their satisfaction with the adequacy of recharge options from their providers. Although not much significant difference can be found between mobile voice and mobile internet on the accumulated scores that range from rating 8 to 10 (77% vs. 73%), it is found that those who are extremely satisfied with the adequacy of recharge options for mobile voice is significantly higher than those who are satisfied with mobile internet.

Figure 33: Satisfaction with the adequacy of recharge options



Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266.

Satisfaction with the adequacy of recharge options by gender show that males are generally more satisfied than females showing a 10% and 9% gap for mobile voice and mobile internet respectively. By nationality, Qatari nationals have higher satisfaction score on the adequacy of

recharge options for mobile voice compared to non-Qatari nationals (86% vs. 75%), whereas the opposite is observed for mobile internet (68% vs. 73%). See Tables 132 and 133.

Table 132: Satisfaction with the adequacy of recharge options by gender			
	Results at the total sample level	Males	Females
Mobile Voice	77%	79%	69%
Mobile Internet	72%	74%	65%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 133: Satisfaction with the adequacy of recharge options by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	77%	86%	75%
Mobile Internet	72%	68%	73%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

In terms of satisfaction with the adequacy of recharge options by age group, the 35-44 years segment is the most satisfied across other age groups in the mobile voice service, whereas the 45-54 years segment tends to show the highest satisfaction ratings on mobile internet. The 15-24 years segment has the lowest satisfaction on both mobile voice and mobile internet at only 66% and 70% respectively. See Table 134.

Table 134: Satisfaction with the adequacy of recharge options by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	77%	66%	78%	79%	76%	83%
Mobile Internet	72%	70%	72%	71%	79%	86%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Looking at consumers' satisfaction with the adequacy of recharge options by municipality, consumers in Al Shamal (92%), Al Daayen (92%), Al Sheehaniya (92%), Umm Slal (86%), Al Khor & Al Thakhira (83%) and Al Rayyan (78%) show above average satisfaction ratings on the mobile voice services while consumers in areas like Doha (73%) and Al Wakra (61%) end up with the lowest satisfaction scores, even showing below average scores. For the mobile internet services, higher than overall score can be noted in areas like Umm Slal (89% vs. 72%), Al Sheehaniya (84% vs. 72%), Al Khor & Al Thakhira (83% vs. 72%) and Al Daayen (76% vs. 72%). However, low scores are registered in Doha (72%), Al Rayyan (71%), Al Shamal (67%) and Al Wakra (59%). See Table 135.

Table 135: Satisfaction with the adequacy of recharge options by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	77%	73%	78%	61%	86%	83%	92%	92%	92%
Mobile Internet	72%	72%	71%	59%	89%	83%	67%	76%	84%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

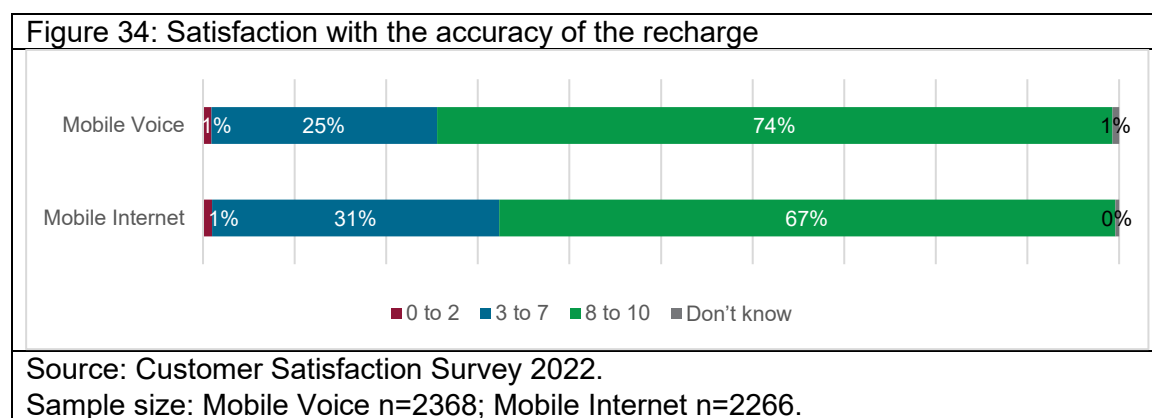
In terms of the satisfaction level with the adequacy of recharge options by service provider, Vodafone Qatar P.Q.S.C receives a higher score compared to Ooredoo Qatar Q.P.S.C in both its mobile voice (78% vs. 76%) and mobile internet services (73% vs. 72%). See Table 136.

Table 136: Satisfaction with the adequacy of recharge options by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	77%	76%	78%
Mobile Internet	72%	72%	73%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.9.2 Accuracy of the recharge

Respondents were asked about their satisfaction with the accuracy of the recharge from their providers. Consumers are more satisfied with the accuracy of the recharge from the mobile voice services than the mobile internet services (74% vs. 67%). See Figure 34.



Satisfaction on the accuracy of the recharge by gender show higher score for males than females in both mobile voice (76% vs. 67%) and mobile internet (69% vs. 61%) services while Qatari nationals persistently show significantly higher satisfaction score in mobile voice (85% vs. 72%) compared to the expatriates. However, the opposite is observed for mobile internet where non-Qatari nationals are more satisfied for its accuracy of the recharge when compared to Qatari nationals (68% vs. 61%). See Tables 137 and 138.

Table 137: Satisfaction with the accuracy of the recharge by gender			
	Results at the total sample level	Males	Females
Mobile Voice	74%	76%	67%
Mobile Internet	67%	69%	61%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 138: Satisfaction with the accuracy of the recharge by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	74%	85%	72%
Mobile Internet	67%	61%	68%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Those aged 35-44 years old (77%) and those aged 45-54 years old (77%) are the most satisfied with the accuracy of the recharge for their mobile voice service while the 15-24-year-old age group are the least satisfied at 63%. In terms of the accuracy of the recharge for their mobile internet service, the 45-54-year age group are the most satisfied (76%) while the 15-24-year age group (61%) and 55+ year age group (61%) are the least happy. See Table 139.

Table 139: Satisfaction with the accuracy of the recharge by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	74%	63%	73%	77%	77%	74%
Mobile Internet	67%	61%	70%	63%	76%	61%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Generally, consumers in Al Sheehaniya show highest satisfaction with the accuracy of the recharge for their mobile voice (93%) and mobile internet (80%) services. Moreover, accuracy of the recharge of the mobile voice services is highly appreciated by consumers in Umm Slal (85%), Al Khor & Al Thakhira (81%), Al Shamal (77%) and Al Rayyan (75%). The positive evaluation is also shown in Umm Slal (78%), Doha (71%) and Al Khor & Al Thakhira (69%) for mobile internet services as well. On the other hand, consumers in Al Wakra have consistently shown low satisfaction scores on the accuracy of the recharge for their mobile voice (60%) and mobile internet (54%) services respectively. Consumers in Al Daayen have also noted the lowest satisfaction score in mobile internet (43%). See Table 140.

Table 140: Satisfaction with the accuracy of the recharge by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	74%	71%	75%	60%	85%	81%	77%	69%	93%
Mobile Internet	67%	71%	66%	54%	78%	69%	67%	43%	80%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

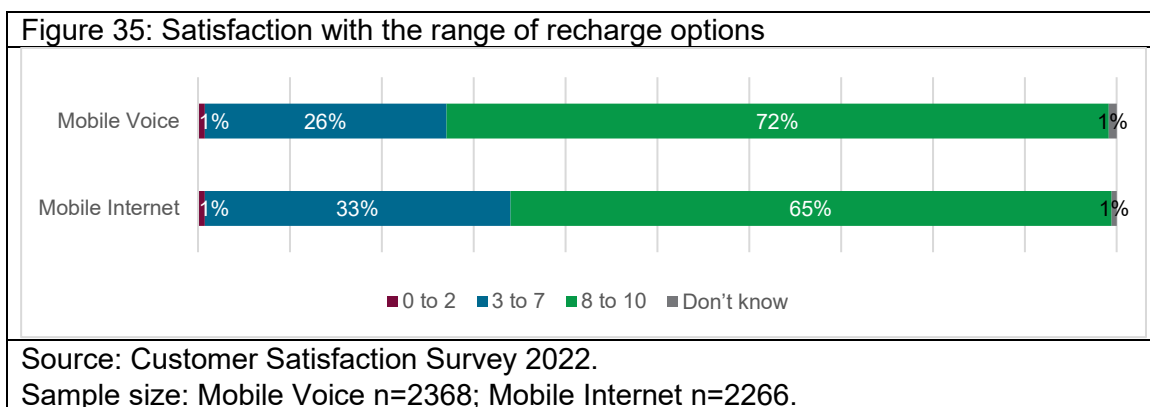
In terms of the satisfaction level with the accuracy of the recharge by service provider, Ooredoo Qatar Q.P.S.C and Vodafone Qatar P.Q.S.C are found to be on a similar level for both the mobile voice (74% vs. 73%) and mobile internet (67% vs. 67%) services. See Table 141.

Table 141: Satisfaction with the accuracy of the recharge by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	74%	74%	73%
Mobile Internet	67%	67%	67%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.9.3 Range of recharge options

Respondents were asked about their satisfaction with the range of recharge options provided. Mobile voice tends to show higher satisfaction score compared to mobile internet services (72% vs. 66%). See Figure 35.



Satisfaction with the range of recharge options show higher level of appreciation by males than females (74% vs. 66% for mobile voice and 67% vs. 60% for mobile internet). Again, Qatari nationals show significantly higher satisfaction score in mobile voice (84% vs. 70%) compared to the expatriates. However, the opposite is observed for mobile internet where non-Qatari nationals are more satisfied with the range of recharge options when compared to Qatari nationals (66% vs. 61%). See Tables 142 and 143.

Table 142: Satisfaction with the range of recharge options by gender			
	Results at the total sample level	Males	Females
Mobile Voice	72%	74%	66%
Mobile Internet	65%	67%	60%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 143: Satisfaction with the range of recharge options by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	72%	84%	70%
Mobile Internet	65%	61%	66%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

The 45-54 years are the most satisfied with the range of recharge options for their mobile voice service (76%) while the least satisfied are the 15-24 years (63%). For the mobile internet, the 45-54 years again show the highest satisfaction at 71% as the 15-24 years show the lowest satisfaction at 63%. See Table 144.

Table 144: Satisfaction with the range of recharge options by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	72%	63%	71%	75%	76%	72%
Mobile Internet	65%	63%	69%	59%	71%	68%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Looking at the satisfaction with the range of the recharge options by municipality, Al Sheehaniya (91%), Umm Slal (82%), Al Khor & Al Thakhira (77%) and Al Daayen (73%) show the best scores for the mobile voice services, but the lowest ones are noted in Al Wakra (56%) and Al Shamal (69%). For mobile internet services, the highest scores are found in areas such as Doha (71%), Al Khor & Al Thakhira (71%) and Umm Slal (69%) while the lowest scores are reflected in Al Shamal (33%) and Al Daayen (41%). See Table 145.

Table 145: Satisfaction with the range of recharge options by municipality

	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	72%	71%	72%	56%	82%	77%	69%	73%	91%
Mobile Internet	65%	71%	62%	63%	69%	71%	33%	41%	65%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

In terms of the satisfaction level with the range of recharge options offered by service providers, Ooredoo Qatar Q.P.S.C and Vodafone Qatar P.Q.S.C are found to be on a similar level for both the mobile voice (72% vs. 73%) and mobile internet (66% vs. 64%) services. See Table 146.

Table 146: Satisfaction with the range of recharge options by service provider

	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	72%	72%	73%
Mobile Internet	65%	66%	64%

Source: Customer Satisfaction Survey 2022.

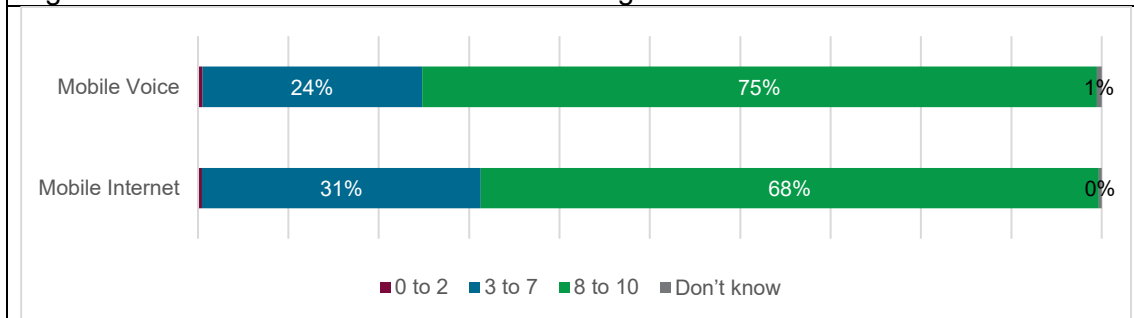
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.9.4 Ease of recharge

Respondents were asked about their satisfaction with the ease of recharge of their providers. Satisfaction score on the ease of recharge for their mobile voice is at 75%. 32% of which have a rating of 10. Meanwhile, satisfaction with mobile internet is slightly lower at 68% with 22% giving a rating of 10. See Figure 36.

Figure 36: Satisfaction with the ease of recharge



Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266.

Males generally show higher satisfaction on the ease of recharge versus females (78% vs. 64% for mobile voice and 71% vs. 56% for mobile internet). The same goes true for Qatari nationals who have significantly higher satisfaction scores than non-Qatari nationals in mobile voice (84% vs. 73%). However, the opposite is observed for the satisfaction with mobile internet service where the expatriates are more satisfied for the ease of recharge at 69%.

See Tables 147 and 148.

Table 147: Satisfaction with the ease of recharge by gender

	Results at the total sample level	Males	Females
Mobile Voice	75%	78%	64%
Mobile Internet	68%	71%	56%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 148: Satisfaction with the ease of recharge by nationality

	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	75%	84%	73%
Mobile Internet	68%	55%	69%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

In terms of satisfaction with the ease of recharge by age group, the 45-54 years segment is the most satisfied across other age groups in both the mobile voice and mobile internet services. The 15-24 years segment has the lowest satisfaction on mobile voice (61%) and mobile internet (64%), with the 55+ years age group joining the low-end group at 64% for mobile internet service. See Table 149.

Table 149: Satisfaction with the ease of recharge by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	75%	61%	76%	77%	80%	76%
Mobile Internet	68%	64%	70%	65%	76%	64%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Looking at consumers' satisfaction with the ease of recharge by municipality, consumers in Al Sheehaniya (95%), Al Khor & Al Thakhira (83%), Al Shamal (83%), Umm Slal (77%) and Al Rayyan (76%) show above average satisfaction ratings on the mobile voice services while consumers in areas like Doha (75%), Al Wakra (56%) and al Daayen (49%) end up with the lowest satisfaction scores, showing on par or below the overall average score. For the mobile internet services, higher than overall average score can be noted in areas like Al Sheehaniya (84%), Al Khor & Al Thakhira (75%), Doha (74%) and Umm Slal (72%). However, low scores are registered in Al Shamal (67%), Al Rayyan (66%), Al Wakra (56%) and Al Daayen (34%). See Table 150.

Table 150: Satisfaction with the ease of recharge by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	75%	75%	76%	56%	77%	83%	83%	49%	95%

Mobile Internet	68%	74%	66%	56%	72%	75%	67%	34%	84%
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Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

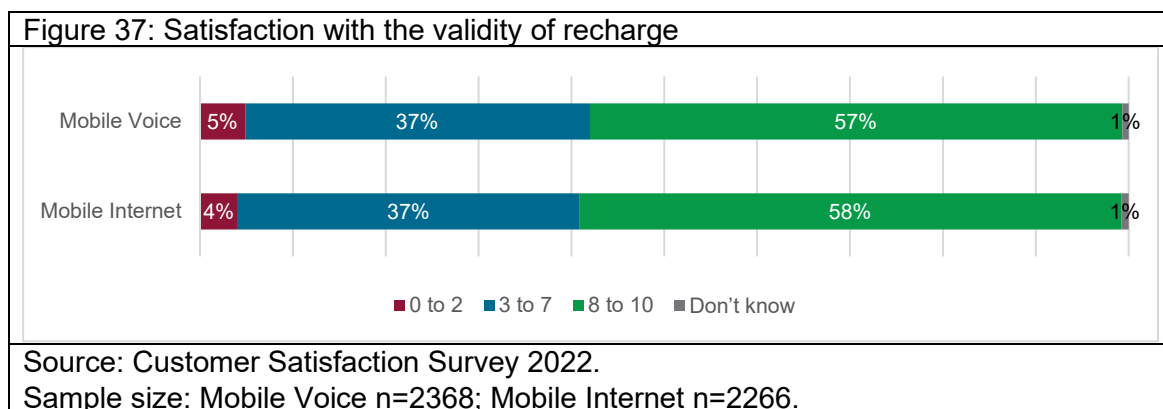
In terms of the satisfaction level with the ease of recharge by service providers, Ooredoo Qatar Q.P.S.C and Vodafone Qatar P.Q.S.C are found to be on a similar level for both the mobile voice (75% vs. 74%) and mobile internet (68% vs. 69%) services. See Table 151.

Table 151: Satisfaction with the ease of recharge by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	75%	75%	74%
Mobile Internet	68%	68%	69%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.9.5 Validity of recharge

Respondents were asked about their satisfaction towards the validity of recharge from their providers. Consumers are equivalently satisfied with the validity of recharge for both mobile voice and mobile internet at 58%. See Figure 37.



Satisfaction with the validity of recharge is comparatively higher amongst males than females by gender (59% vs. 52% for mobile voice, 60% vs. 54% for mobile internet) while Qatari nationals constantly show significantly higher satisfaction scores versus expatriates for both mobile voice (59% vs. 57%) and mobile internet (61% vs. 58%). See Tables 152 and 153.

Table 152: Satisfaction with the validity of recharge by gender			
	Results at the total sample level	Males	Females
Mobile Voice	57%	59%	52%
Mobile Internet	58%	60%	54%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 153: Satisfaction with the validity of recharge by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	57%	59%	57%
Mobile Internet	58%	61%	58%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

The 35-44 years segment (60%) and 45-54 years segment (58%) are the most satisfied with the validity of recharge for their mobile voice service while those aged 15-24 years and 25-34 years are the least satisfied at 55%. In terms of the validity of recharge for their mobile internet service, the 55+ years segment is the most satisfied (79%) while the 35-44 years segment are the least happy at 54%. See Table 154.

Table 154: Satisfaction with the validity of recharge by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	57%	55%	55%	60%	58%	57%
Mobile Internet	58%	55%	58%	54%	70%	79%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Generally, consumers in Al Khor & Al Thakhira show highest satisfaction with the validity of recharge for mobile voice (73%), followed behind by Umm Slal (68%), Al Sheehaniya (68%) and Al Rayyan (59%). On the other hand, validity of recharge for mobile voice is lowly appreciated by consumers in Al Shamal (38%) and Al Wakra (48%) which are significantly under the overall average level of 57%. For mobile internet, Al Khor & Al Thakhira again shows the highest satisfaction level at 69% with Umm Slal (67%) and Al Shamal (67%) following behind respectively. Consumers in Al Daayen note the lowest satisfaction score at 41%. See Table 155.

Table 155: Satisfaction with the validity of recharge by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	57%	54%	59%	48%	68%	73%	38%	52%	68%
Mobile Internet	58%	60%	57%	49%	67%	69%	67%	41%	61%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

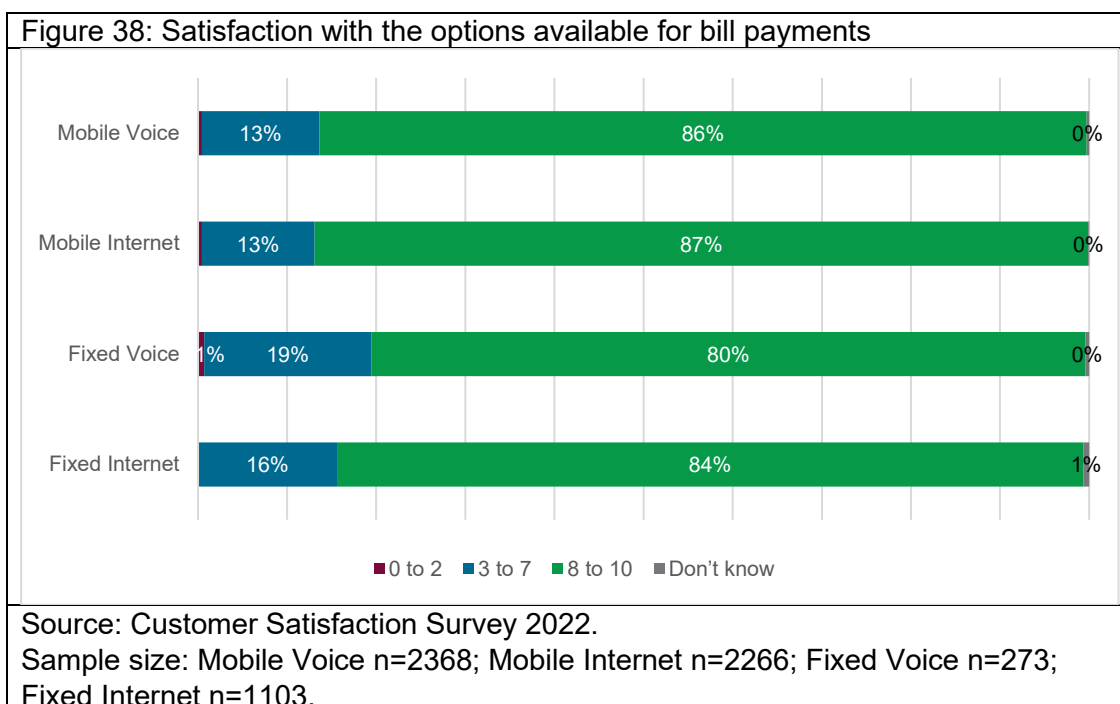
It is found that Vodafone Qatar P.Q.S.C users are more satisfied in terms of the validity of recharge when compared to Ooredoo Qatar Q.P.S.C for both mobile voice (60% vs. 56%) and mobile internet (60% vs. 57%) respectively. See Table 156.

Table 156: Satisfaction with the validity of recharge by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	57%	56%	60%
Mobile Internet	58%	57%	60%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.9.6 Options available for bill payments

Respondents were asked about their satisfaction with the options available for bill payments. Mobile services tend to show higher satisfaction scores when compared with fixed services – mobile voice (86%) vs. fixed voice (80%); mobile internet (87%) vs. fixed internet (84%). See Figure 38.



Satisfaction with the options available for bill payments show minimal differences between males and females except for the fixed voice service where satisfaction scores have slightly wider gaps between the gender segments (83% vs. 75%). Wider gaps on satisfaction scores between Qatari

nationals and non-Qatari nationals can be noted in the fixed services – fixed internet 91% vs. 80% and fixed voice 85% vs. 76%. See Tables 157 and 158.

Table 157: Satisfaction with the options available for bill payments by gender			
	Results at the total sample level	Males	Females
Mobile Voice	86%	86%	88%
Mobile Internet	87%	87%	87%
Fixed Voice	80%	83%	75%
Fixed Internet	84%	83%	85%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 158: Satisfaction with the options available for bill payments by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	86%	93%	83%
Mobile Internet	87%	91%	85%
Fixed Voice	80%	85%	76%
Fixed Internet	84%	91%	80%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

The 25-34 years segment and 45-54 years segment are the most satisfied with the options available for bill payments for their mobile voice service (87%) while the least satisfied are the 55+ years segment (81%). For the mobile internet, those aged 45-54 years again show the highest satisfaction at 91% whereas the 15-24 years segment shows the lowest satisfaction at 82%. For fixed voice, the 55+ years segment shows the highest appreciation for the options available for bill payments (92%), while the youngest age group shows the least satisfaction at only 59%. For fixed internet, the 55+ years segment consistently shows the highest rating at

95% while the 15-24 years segment again show the lowest rating at only 79%. See Table 159.

Table 159: Satisfaction with the options available for bill payments by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	86%	83%	87%	86%	87%	81%
Mobile Internet	87%	82%	86%	87%	91%	88%
Fixed Voice	80%	59%	69%	81%	89%	92%
Fixed Internet	84%	79%	86%	83%	82%	95%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Looking at the satisfaction with the options available for bill payments by municipality, Al Shamal (100%), Al Sheehaniya (97%), Al Khor & Al Thakhira (96%) and Umm Slal (91%) show the best scores for the mobile voice services, but the lowest ones are noted in Al Rayyan (84%) and Al Wakra (80%). For mobile internet services, the highest scores mirror the same areas such as Al Sheehaniya (97%), Al Shamal (95%) and Al Khor & Al Thakhira (91%) while the lowest score is also reflected in Al Wakra (73%). Meanwhile, for fixed voice services, consumers in Al Daayen (96%), Al Shamal (86%) and Al Rayyan (83%) have high scores on their satisfaction. Fixed internet is also mostly appreciated by consumers in Al Sheehaniya (91%) and Al Shamal (90%). See Table 160.

Table 160: Satisfaction with the options available for bill payments by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	86%	86%	84%	80%	91%	96%	100%	85%	97%
Mobile Internet	87%	88%	87%	73%	86%	91%	95%	87%	97%

Fixed Voice	80%	82%	83%	54%	78%	71%	86%	96%	82%
Fixed Internet	84%	87%	82%	75%	88%	89%	90%	71%	91%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

When it comes to the satisfaction with the options available for bill payments by service providers, wider gap is found in fixed services than mobile services with higher level of satisfaction found for Ooredoo Qatar Q.P.S.C (82% vs. 71% for fixed voice, 86% vs. 72% for fixed internet, 87% vs. 85% for mobile voice and 88% vs. 85% for mobile internet). See Table 161.

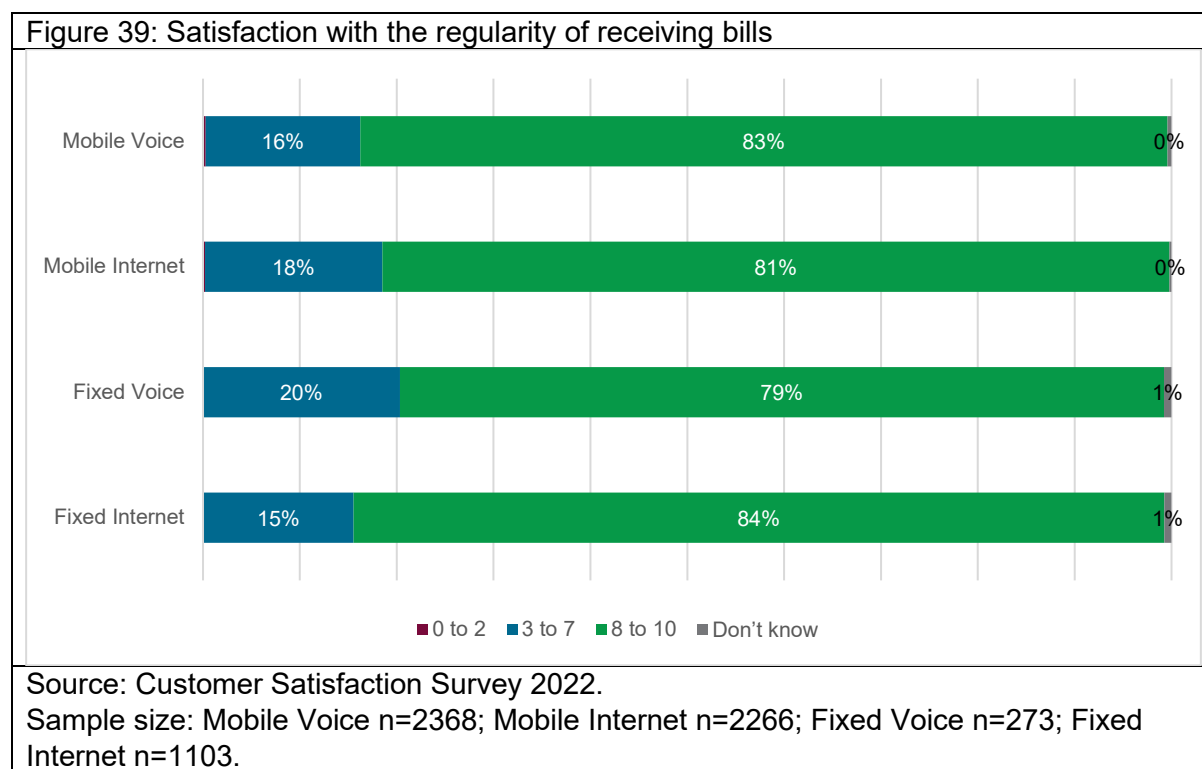
Table 161: Satisfaction with the options available for bill payments by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	86%	87%	85%
Mobile Internet	87%	88%	85%
Fixed Voice	80%	82%	71%
Fixed Internet	84%	86%	72%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.9.7 Regularity of receiving bills

Respondents were asked about their satisfaction with the regularity of receiving bills of their providers. Satisfaction with the regularity of receiving bills for their mobile voice is at 83%. 41% of which have a rating of 10. Meanwhile, satisfaction with mobile internet is slightly lower at 81% with 41% giving a rating of 10. Fixed voice shows the lowest satisfaction ratings with the

regularity of receiving bills at 79%, despite the highest rating of 10 at 43%. On the other hand, fixed internet is evaluated to be the most satisfied service at 84%, although it shows the lowest rating of 10 at 35%. See Figure 39.



Males generally show higher satisfaction on the regularity of receiving bills versus females on voice related services, whereas the opposite is observed for internet services. For nationality group comparison, Qatari nationals are generally more satisfied than the expatriates for all mobile and fixed services. See Tables 162 and 163.

Table 162: Satisfaction with the regularity of receiving bills by gender

	Results at the total sample level	Males	Females
Mobile Voice	83%	84%	83%
Mobile Internet	81%	81%	83%
Fixed Voice	79%	81%	76%
Fixed Internet	84%	83%	85%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 163: Satisfaction with the regularity of receiving bills by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	83%	90%	80%
Mobile Internet	81%	89%	78%
Fixed Voice	79%	86%	71%
Fixed Internet	84%	88%	82%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

By age group, older respondents (45 years and above) tend to show higher than the overall satisfaction scores while the youngest age group (15-24 years) show relatively lower scores across all services, particularly in fixed voice compared to the overall average score (52% vs. 79%). Satisfaction with the regularity of receiving bills for mobile voice and mobile internet is highest among the 55+ years segment (87%) and lowest among the 15-24 years segment (77% and 79% respectively). A similar trend is shown for fixed voice and fixed internet where satisfaction is the highest amongst 55+ years segment at 92% and 93%. Again, the lowest satisfaction is shown by 15-24 years segment at 52% and 80% respectively. See Table 164.

Table 164: Satisfaction with the regularity of receiving bills by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	83%	77%	83%	85%	84%	87%
Mobile Internet	81%	79%	79%	82%	85%	87%
Fixed Voice	79%	52%	77%	78%	86%	92%
Fixed Internet	84%	80%	85%	81%	86%	93%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

In terms of satisfaction with the regularity of receiving bills by municipality, most municipalities are above the overall satisfaction rating on their mobile voice except in Al Rayyan (81% vs. 83%) and Al Wakra (73% vs. 83%). Similar trend is observed for mobile internet as well.

See Table 165.

For fixed voice services, satisfaction ratings on the regularity of receiving bills are higher than overall in Umm Slal (91%), Al Sheehaniya (91%), Al Daayen (89%), Al Khor & Al Thakira (87%) and Al Shamal (86%). However, it is the opposite case in areas like Doha (79%), Al Rayyan (80%) and Al Wakra (48%) where satisfaction scores are either at par or relatively lower than the overall (79%). Similarly, satisfaction scores on the regularity of receiving bills for fixed internet vary by area. Al Shamal (95%), Al Sheehaniya(93%), Doha (88%), Al Khor & Al Thakhira (86%) show higher scores than the overall (84%) while Umm Slal (84%), Al Rayyan (80%), Al Wakra (78%) and Al Daayen (73%) show lower scores with the latter having the least satisfaction rating.

Table 165: Satisfaction with the regularity of receiving bills by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	83%	84%	81%	73%	84%	90%	90%	90%	94%
Mobile Internet	81%	83%	78%	70%	80%	91%	90%	85%	95%
Fixed Voice	79%	79%	78%	48%	91%	87%	86%	89%	91%
Fixed Internet	84%	88%	80%	78%	84%	86%	95%	73%	93%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

Looking at consumers' satisfaction with the regularity of receiving bills by service provider, Ooredoo Qatar Q.P.S.C outperforms Vodafone Qatar P.Q.S.C as it rates above the overall satisfaction scores across all services. The widest gap between the two service providers can be seen for the fixed voice (82% vs. 65%). See Table 166.

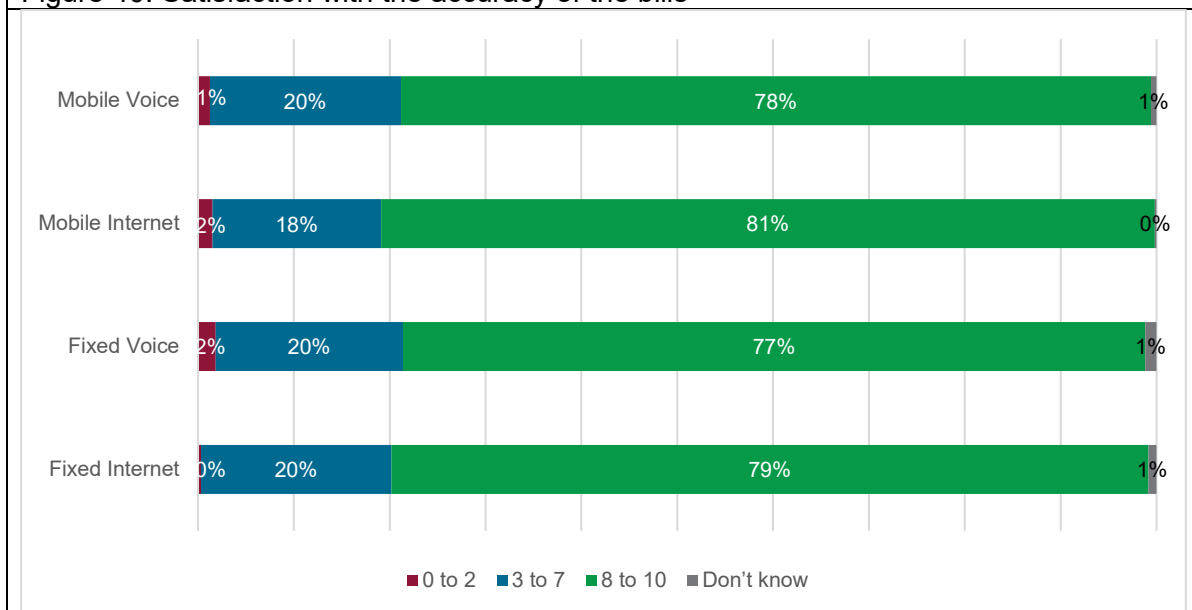
Table 166: Satisfaction with the regularity of receiving bills by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	83%	85%	81%
Mobile Internet	81%	83%	78%
Fixed Voice	79%	82%	65%
Fixed Internet	84%	86%	74%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.9.8 Accuracy of the bills

Respondents were asked about their satisfaction with the accuracy of the bills of their service providers. Satisfaction score is highest on mobile internet service at 80% with 35% giving a score of 10. Following behind are fixed internet (79%) and mobile voice (78%). The lowest satisfaction score is on fixed voice where only 77% claim they are satisfied with the accuracy of the bills for this service.

Figure 40: Satisfaction with the accuracy of the bills



Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Satisfaction with the accuracy of the bills by gender shows mostly favorable scores among the females vs. the males except for the fixed voice service (73% vs. 81%). Females show above than average on mobile voice (81% vs. 78%), mobile internet (84% vs. 81%) and fixed internet (80% vs. 79%). Meanwhile, males have lower than the overall scores in services like mobile voice (77% vs. 78%) and mobile internet (79% vs. 81%). See Table 167.

Across all services, Qatari nationals show higher ratings than overall satisfaction scores. Highest satisfaction scores among Qatari nationals are on mobile internet at 89% (vs. 81% overall score) and mobile voice at 87% (vs. 78% overall score). On the other hand, non-Qatar nationals show generally lower satisfaction scores. Satisfaction on the accuracy of the bills for fixed voice is lowest at 70% followed by mobile voice (74%), fixed internet (76%) and mobile internet (77%). See Table 168.

Table 167: Satisfaction with the accuracy of the bills by gender			
	Results at the total sample level	Males	Females
Mobile Voice	78%	77%	81%
Mobile Internet	81%	79%	84%

Fixed Voice	77%	81%	73%
Fixed Internet	79%	79%	80%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 168: Satisfaction with the accuracy of the bills by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	78%	87%	74%
Mobile Internet	81%	89%	77%
Fixed Voice	77%	85%	70%
Fixed Internet	79%	86%	76%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

In terms of satisfaction with the accuracy of the bills by age group, mobile voice tends to get a boost from the older groups such as 45-54 years (82%) and 55+ years (80%) segments as they show higher ratings than the overall average score. However, satisfaction on mobile voice shows lower scores among the 15-24 (74%) and the 25-34 years segments (77%). See Table 169.

A similar trend is observed in mobile internet and fixed voice where the older respondents show higher ratings than the overall satisfaction score (mobile internet: 55+ years (88%), 45-54 years (83%) / fixed voice: 55+ years (90%), 45-54 years (83%)), while the younger age groups either show parity or lower scores than the overall. The lowest satisfaction on mobile internet can be noted amongst the 25-34 years (77%) and 15-24 years segments (59%) for fixed voice.

For fixed internet, except for the 25-34 years segment (80%) and 45-54 years segment (82%), all other age groups show lower satisfaction ratings vs. the overall score with the 35-44 years segment showing the lowest satisfaction at only 77%.

Table 169: Satisfaction with the accuracy of the bills by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	78%	74%	77%	79%	82%	80%
Mobile Internet	81%	80%	77%	82%	83%	88%
Fixed Voice	77%	59%	72%	77%	83%	90%
Fixed Internet	79%	79%	80%	77%	82%	75%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Satisfaction score with the accuracy of the bills by municipality is lowest in Al Wakra across all services with fixed voice having the least satisfaction score at only 54%. See Table 170.

In terms of mobile voice, satisfaction is highest in Al Khor & Al Thakhira (96%) followed by Al Sheehaniya (89%) and Umm Slal (82%) but is low in Al Wakra (72%), Doha (77%) and Al Rayyan (77%). For mobile internet, consumers are most satisfied in areas like Al Sheehaniya (94%), Al Khor & Al Thakhira (93%) and Al Shamal (90%). However, consumers from areas such as Al Wakra (72%), Umm Slal (77%) and Al Rayyan (78%) show lower satisfactions scores compared with the overall satisfaction score for mobile internet. For fixed voice, most areas have higher than the overall score except Al Wakra (54%) and Doha (73%). Meanwhile, for fixed internet, some of the low scores can be found in areas such as Al Wakra (67%), Al Daayen (69%) and Al Rayyan (76%).

Table 170: Satisfaction with the accuracy of the bills by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	78%	77%	77%	72%	82%	96%	79%	79%	89%
Mobile Internet	81%	81%	78%	72%	77%	93%	90%	80%	94%

Fixed Voice	77%	73%	84%	54%	86%	86%	86%	85%	82%
Fixed Internet	79%	83%	76%	67%	86%	81%	90%	69%	89%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

When asked about their satisfaction with the accuracy of the bills by service provider, consumers claim higher satisfaction on Ooredoo Qatar Q.P.S.C vs. Vodafone Qatar P.Q.S.C on mobile voice (80% vs. 74%), mobile internet (83% vs. 77%), fixed voice (78% vs. 75%) and fixed internet which shows the highest gap between the two (81% vs. 68%).

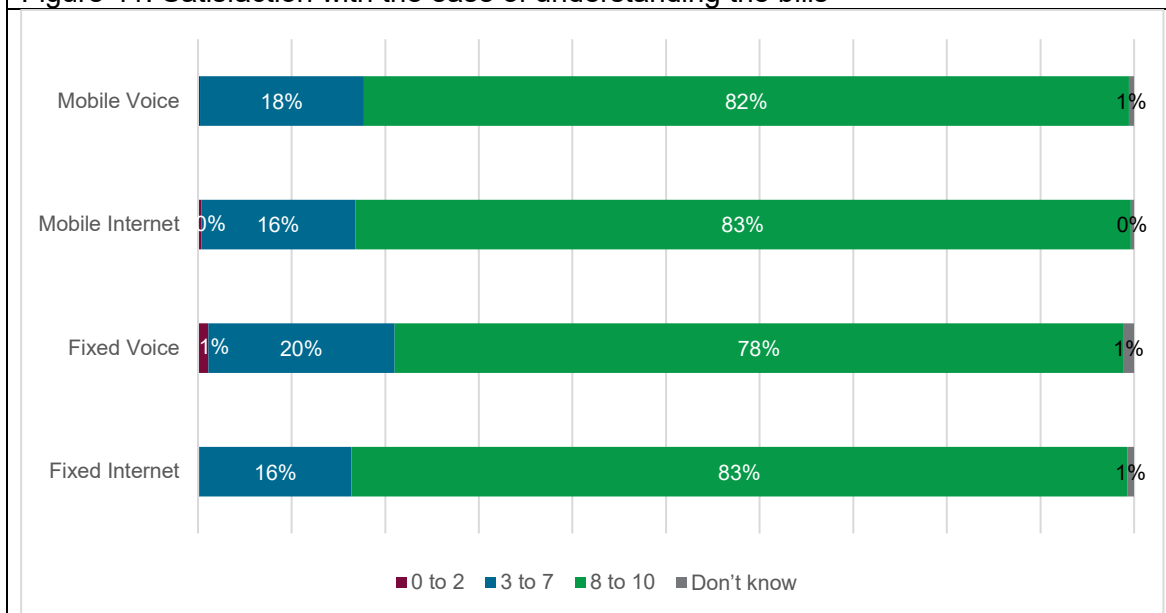
Table 171: Satisfaction with the accuracy of the bills by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	78%	80%	74%
Mobile Internet	81%	83%	77%
Fixed Voice	77%	78%	75%
Fixed Internet	79%	81%	68%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.9.9 Ease of understanding the bills

Respondents were asked about their satisfaction with the ease of understanding the bills offered by their service providers. Consumers are generally more satisfied with internet related services compared with the voice services. Satisfaction with mobile internet and fixed internet are at both 83%. However, the satisfaction rating for mobile voice and fixed voice are found to be at 81% and 78% respectively. See Figure 41.

Figure 41: Satisfaction with the ease of understanding the bills



Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Satisfaction with the ease of understanding the bills by gender generally show higher scores among males vs. females across all services except for mobile internet and fixed internet which are at parity. Meanwhile, between Qatari nationals and non-Qatari nationals, the former is likely to show significantly higher scores vs. the latter and even against the overall scores across all services. Mobile voice (89% vs. 78%) and fixed voice (83% vs. 72%) have the biggest gaps against non-Qatari nationals. See Tables 172 and 173.

Table 172: Satisfaction with the ease of understanding the bills by gender

	Results at the total sample level	Males	Females
Mobile Voice	82%	83%	79%
Mobile Internet	83%	83%	83%
Fixed Voice	78%	81%	72%
Fixed Internet	83%	83%	83%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 173: Satisfaction with the ease of understanding the bills by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Mobile Voice	82%	89%	78%
Mobile Internet	83%	89%	80%
Fixed Voice	78%	83%	72%
Fixed Internet	83%	90%	80%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

When it comes to satisfaction with the ease of understanding the bills by age group, 45-54 years segment tend to show above average scores across all services compared with the other age groups. See Table 174.

For mobile voice, satisfaction is highest among the 45-54 years segment (85%) followed by the 25-34 years (82%) and 35-44 years (82%) segments. However, lower than the overall score can be noted among the 55+ years (78%) and 15-24 years (79%) segments. On the other hand, satisfaction for mobile internet is highest among the older age groups (55+ years, 90% and 45-54 years 84%) but lowest among the 15-24 years (80%).

For fixed voice, the 55+ years (92%) and the 45-54 years (82%) show higher than overall satisfaction score compared with the 15-24 years (64%), 25-34 years (73%) and 35-44 years (77%) who tend to score lower across other age groups. For fixed internet, the 25-34 years (86%) and the 45-54 years (86%) group record higher than the overall score of 83%.

Table 174: Satisfaction with the ease of understanding the bills by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Mobile Voice	82%	79%	82%	82%	85%	78%
Mobile Internet	83%	80%	81%	83%	84%	90%
Fixed Voice	78%	64%	73%	77%	82%	92%
Fixed Internet	83%	81%	86%	80%	86%	78%

Source: Customer Satisfaction Survey 2022.

Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Looking at the satisfaction with the ease of understanding the bills by municipality, consumers in Al Sheehaniya and Al Khor & Al Thakhira show the highest satisfaction on mobile voice (96% and 92% respectively). For mobile internet, Al Khor & Al Thakhira (94%), Al Daayen (92%), Al Sheehaniya (92%) and Al Shamal (90%) show the highest satisfaction rate. However, lower satisfaction on the mobile voice can be noted among consumers in Al Wakra (72%) and Al Rayyan (79%). Satisfaction with the ease of understanding the bills for mobile internet is also lower in areas like Al Wakra (73%) and Umm Slal (79%).

For fixed voice, higher scores can be observed among consumers in Al Khor & Al Thakhira (100%), Al Sheehaniya (91%), Al Shamal (86%), Umm Slal (82%) and Al Rayyan (81%) while consumers in Al Wakra show the lowest satisfaction at 42%.

For fixed internet, consumers in Al Shamal show the highest satisfaction at 100% while consumers in Al Daayen (68%) and Al Wakra (71%) have the lowest satisfaction scores compared with other consumers in other areas. See Table 175.

Table 175: Satisfaction with the ease of understanding the bills by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Mobile Voice	82%	82%	79%	72%	84%	92%	85%	85%	96%
Mobile Internet	83%	82%	82%	73%	79%	94%	90%	92%	92%
Fixed Voice	78%	79%	81%	42%	82%	100%	86%	79%	91%
Fixed Internet	83%	87%	80%	71%	92%	87%	100%	68%	94%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.

Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

When asked about their satisfaction with the ease of understanding the bills offered by service provider, consumers generally show more favorable satisfaction scores for Ooredoo Qatar Q.P.S.C vs. Vodafone Qatar P.Q.S.C across all services. The biggest gap in satisfaction scores can be noted in fixed voice (82% vs. 61%) followed by fixed internet (85% vs. 72%). See Table 176.

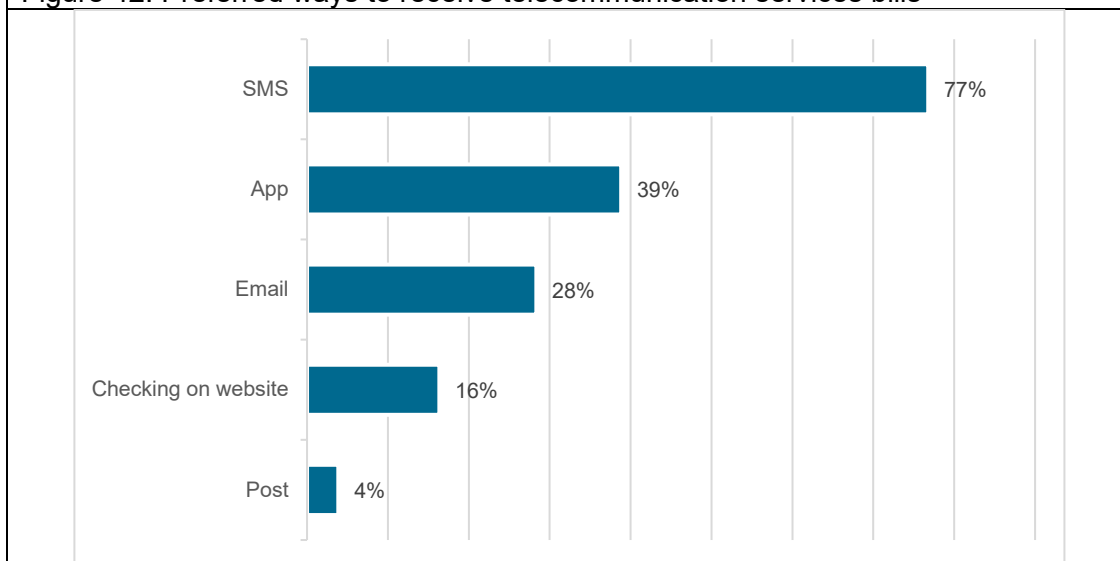
Table 176: Satisfaction with the ease of understanding the bills by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Mobile Voice	82%	83%	79%
Mobile Internet	83%	84%	80%
Fixed Voice	78%	82%	61%
Fixed Internet	83%	85%	72%

Source: Customer Satisfaction Survey 2022.
Sample size: Mobile Voice n=2368; Mobile Internet n=2266; Fixed Voice n=273; Fixed Internet n=1103.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.9.10 Bill payment

Respondents who use post-paid and/or fixed services were asked about their preferred ways to receive telecommunication services bills. Consumers responded that SMS (77%) is their most favorable method to receive telecommunication services bills followed by application (39%) and email (28%). Checking on website and post are found to be the least preferred channels recording only 16% and 4% respectively. See Figure 42.

Figure 42: Preferred ways to receive telecommunication services bills



Source: Customer Satisfaction Survey 2022.

Sample size: respondents who use post-paid and or fixed services n=1794.

Preferences have changed in the past four years when it comes to channels for receiving the telecommunication services bills. In 2022, majority of users prefer receiving their bills through SMS while the most preferred channel in 2018 was emails. Apps are also a new channel mentioned by consumers in 2022 while the proportion of those preferring receiving emails or checking on websites has significantly declined since 2018.

Table 177: Preferred ways to receive telecommunication services bills, 2018 vs 2022

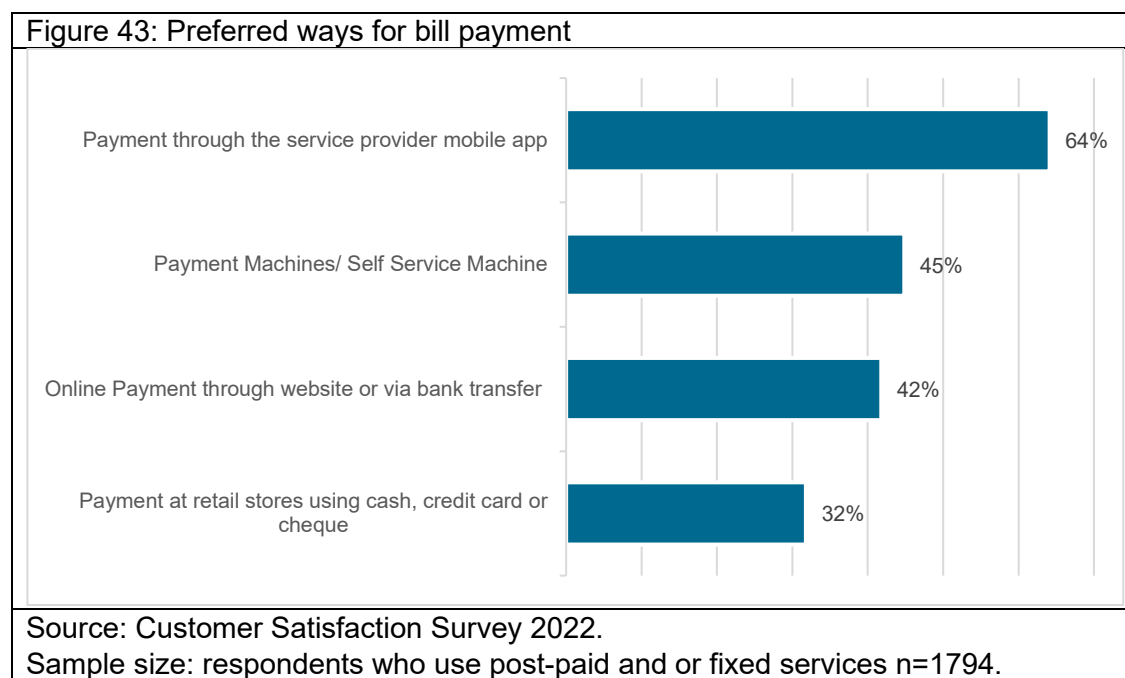
	2018	2022
Sample	1476	1794
SMS	0%	77%
App	0%	39%
Email	59%	28%
Checking on website	36%	16%
Post	5%	4%

Source: Customer Satisfaction Survey 2018 and 2022.

Base of respondents who use post-paid and or fixed services.

Payment through the service provider mobile app is found to be the most preferred ways for bill payment at 64%. Following behind includes payment machines/ self-service machine and online

payment through website or via bank transfer at 45% and 42% respectively. Payment at retail stores is found to be the least preferred way for bill payment at 32%. See Figure 43.



Consistent with the incline in preference for the apps as way for receiving the bills, the results show an increase in the proportion of consumers who prefer to pay their bills through the service provider mobile app (from 25% in 2018 up to 64% in 2022).

Table 178: Preferred ways for bill payment, 2018 vs 2022		
	2018	2022
Sample	1476	1794
Payment through the service provider mobile app	25%	64%
Payment Machines/ Self Service Machine	34%	45%
Online Payment through website or via bank transfer	14%	42%
Payment at retail stores using cash, credit card or cheque	20%	32%

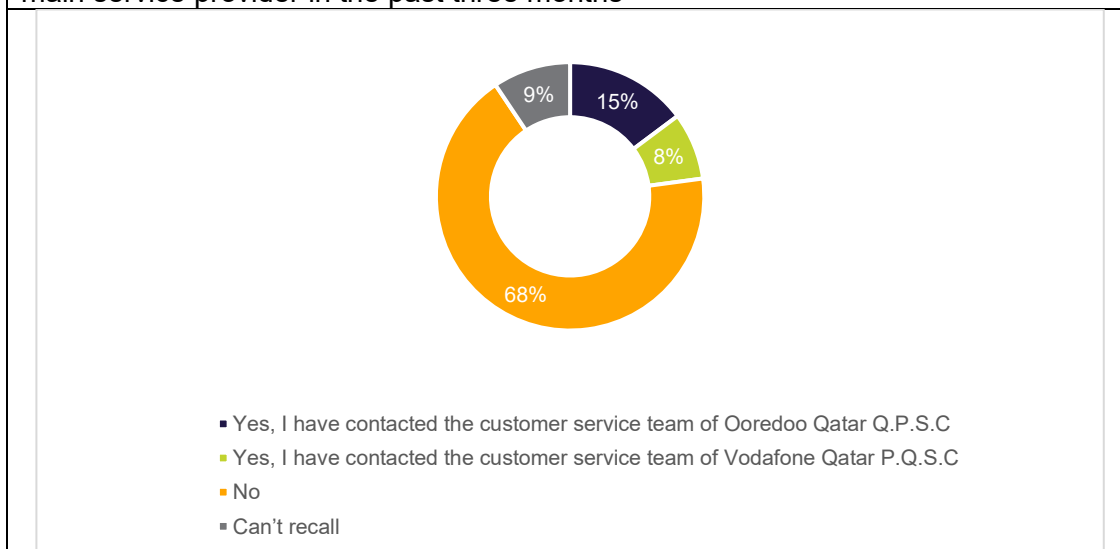
Source: Customer Satisfaction Survey 2018 and 2022.
Base of respondents who use post-paid and or fixed services.

3.10 Satisfaction with customer services

68% of the respondents have specified that they have not contacted the customer services of

their main service provider in the past three months. This is reflected on the small percentage of consumers who have contacted their main service provider’s customer services (Ooredoo Qatar Q.P.S.C: 15% / Vodafone Qatar P.Q.S.C: 8%). Out of those who have contacted the customer services of their main service provider in the past three months, 64% of them made a phone call to the call center of the service provider. Following behind was a visit to the retail store at 47%. Channels such as email (2%), service provider’s social media channel (6%) and website (8%) were found to be relatively less important. See Figures 44 and 45.

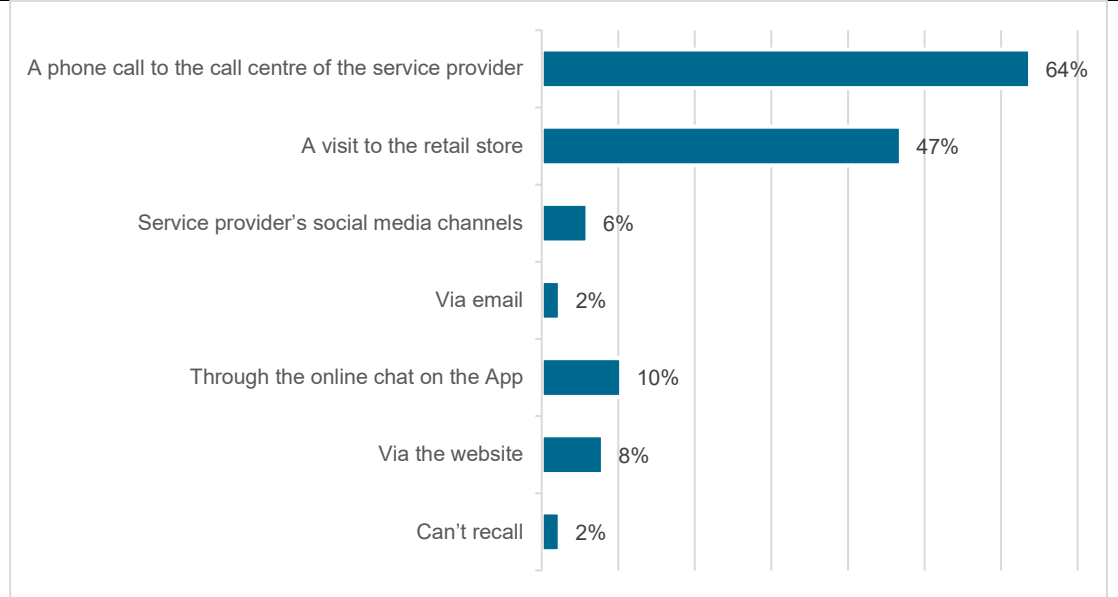
Figure 44: Proportion of residents having contacted the customer services of their main service provider in the past three months



Source: Customer Satisfaction Survey 2022.

Sample size: Overall n=2529.

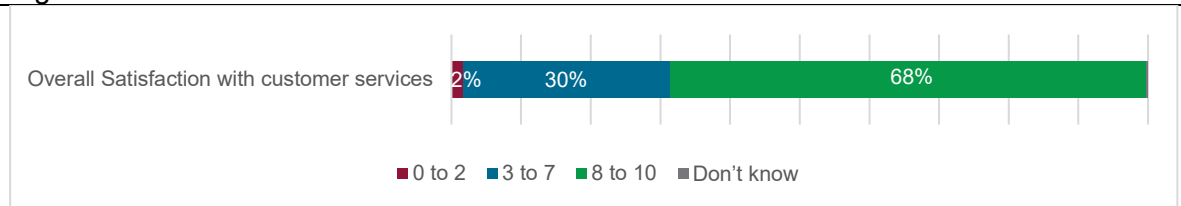
Figure 45: Channels used to contact the customer services



Source: Customer Satisfaction Survey 2022.
Sample size: respondents who have contacted the customers services of their main service provider in the past three months n=578.

It is found that 68% (rating of 8 to 10) of the respondents who have contacted the customers services of their main service provider in the past three months are satisfied with the quality of service that they have received upon contact. See Figure 46.

Figure 46: Overall satisfaction with customer services

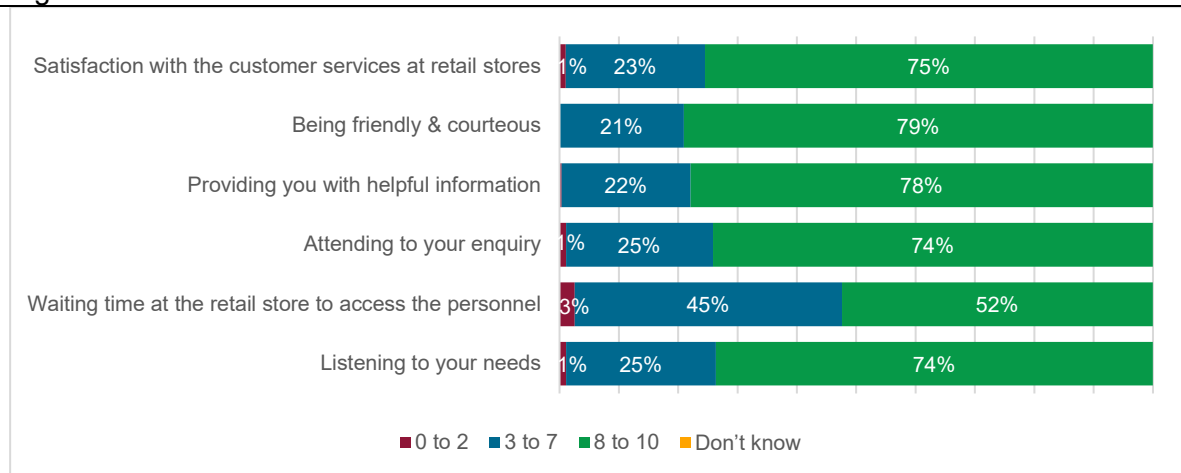


Source: Customer Satisfaction Survey 2022.
Sample size: respondents who have contacted the customers services of their main service provider in the past three months n=578.

For those who have contacted the customer services at a retail store, 75% of them were generally satisfied with the quality of services they have received from the retail store. Among the evaluated factors that contribute to the overall satisfaction score, staff being friendly & courteous received the highest satisfaction level of 78%. Providing customers with helpful information and attending to their enquiry follows behind at 77% and 74% respectively. The lowest satisfaction score was recorded for the waiting time at the retail store to access the

personnel at 53%. See Figure 47.

Figure 47: Overall satisfaction with customer services at retail stores

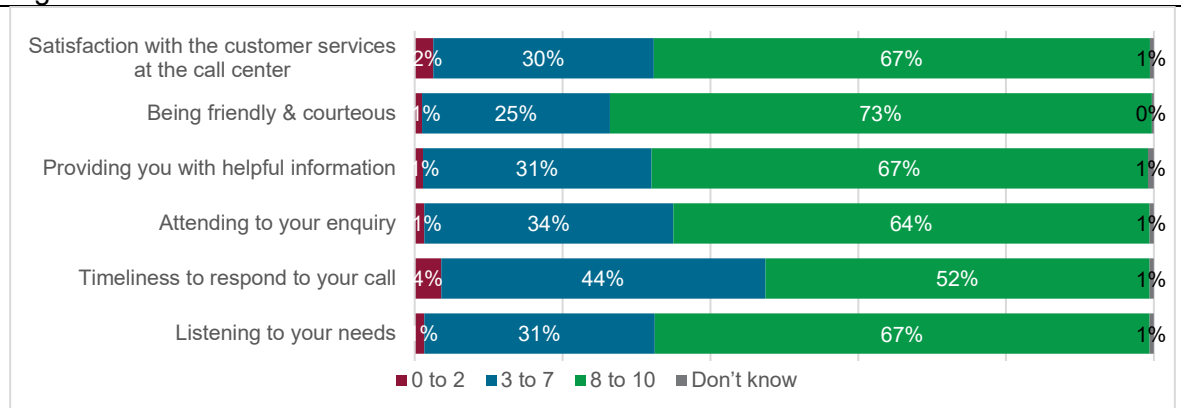


Source: Customer Satisfaction Survey 2022.

Sample size: respondents who have contacted the customer services at a retail store n=271.

For those who have contacted the customer services at the call center, 67% of them were generally satisfied with the quality of services they have received from the call center. Among the evaluated factors that contribute to the overall satisfaction score, staff being friendly & courteous again received the highest satisfaction score of 73%. Providing customers with helpful information and listening to their needs follows behind at 68% and 67% respectively. The lowest satisfaction score was recorded for the timeliness to respond to their call at 53%. See Figure 48.

Figure 48: Overall satisfaction with customer services at the call center



Source: Customer Satisfaction Survey 2022.

Sample size: respondents who have contacted the customer services via the call center n=369.

Looking into the satisfaction with the customer services by gender, males are generally more satisfied than females for both retail store (79% vs. 66%) and call center (70% vs. 60%). Likewise, Qatari nationals show significantly higher satisfaction score compared to the expatriates (83% vs. 63%). This is also portrayed on the satisfaction score for retail store and call center. See Tables 179 and 180.

Table 179: Satisfaction with the customer services by gender			
	Results at the total sample level	Males	Females
Overall Satisfaction	68%	70%	64%
Retail store	75%	79%	66%
Call center	67%	70%	60%

Source: Customer Satisfaction Survey 2022.
Sample size: Overall n=578; Retail store n=271; Call center n=369.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Table 180: Satisfaction with the customer services by nationality			
	Results at the total sample level	Qatari Nationals	Non-Qatari Nationals
Overall Satisfaction	68%	83%	63%
Retail store	75%	88%	65%
Call center	67%	75%	65%

Source: Customer Satisfaction Survey 2022.
Sample size: Overall n=578; Retail store n=271; Call center n=369.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

The 45-54 years age group (77%) and 35-44 years segments (76%) are the most satisfied age group with customer services, while the 15-24 years segment are the least satisfied at 62%. In terms of the retail store, those aged 55+ years show the highest satisfaction level of 82%, whereas those aged 45-54 years show the highest satisfaction score of 79% for call center. See Table 181.

Table 181: Satisfaction with the customer services by age group						
	Results at the total sample level	15-24 years	25-34 years	35-44 years	45-54 years	55+ years
Overall Satisfaction	68%	62%	63%	76%	77%	71%
Retail store	75%	67%	71%	79%	81%	82%
Call center	67%	59%	63%	72%	79%	73%

Source: Customer Satisfaction Survey 2022.
Sample size: Overall n=578; Retail store n=271; Call center n=369.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

Consumers in Al Daayen show the highest satisfaction with customer services at 92%. This is also reflected in the satisfaction score for retail store, achieving 100%. The highest satisfaction score for call center is found in the area of Al Khor & Al Thakhira at 93% which is significantly higher than the overall average score of 67%. See Table 182.

Table 182: Satisfaction with the customer services by municipality									
	Results at the total sample level	Doha	Al Rayyan	Al Wakra	Umm Slal	Al Khor & Al Thakhira	Al Shamal	Al Daayen	Al Sheehaniya
Overall Satisfaction	68%	63%	76%	56%	80%	85%	78%	92%	84%
Retail store	75%	69%	84%	56%	86%	91%	71%	100%	88%
Call center	67%	63%	77%	54%	73%	93%	50%	89%	83%

Source: Customer Satisfaction Survey 2022.
Sample size: Overall n=578; Retail store n=271; Call center n=369.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.
Note: the results for Al Shamal are to be considered as indicative findings only as the sample size is below n=30.

In terms of the satisfaction level with the customer services by service provider, Ooredoo Qatar Q.P.S.C outperforms Vodafone Qatar P.Q.S.C in its overall satisfaction (73% vs. 60%) and call center (71% vs. 58%), but scores lower in the satisfaction score for the retail store (75% vs. 76%). See Table 183.

Table 183: Satisfaction with the customer services by service provider			
	Results at the total sample level	Ooredoo Qatar Q.P.S.C	Vodafone Qatar P.Q.S.C
Overall Satisfaction	68%	73%	60%
Retail store	75%	75%	76%
Call center	67%	71%	58%

Source: Customer Satisfaction Survey 2022.
Sample size: Overall n=578; Retail store n=271; Call center n=369.
Percentage of respondents who have rated their level of satisfaction with the services from 8 to 10.

3.11 Complaint resolution

Respondents were asked about whether or not they had raised a complaint to their telecommunication provider in the past year. Only 10% of respondents have raised a complaint in the past 12 months. See Figure 49.

The services that those customers had raised a complaint about in the past 12 months are Mobile Internet (42%), Mobile Voice (31%), Fixed Internet (25%) and Fixed Voice (2%). See Figure 50.

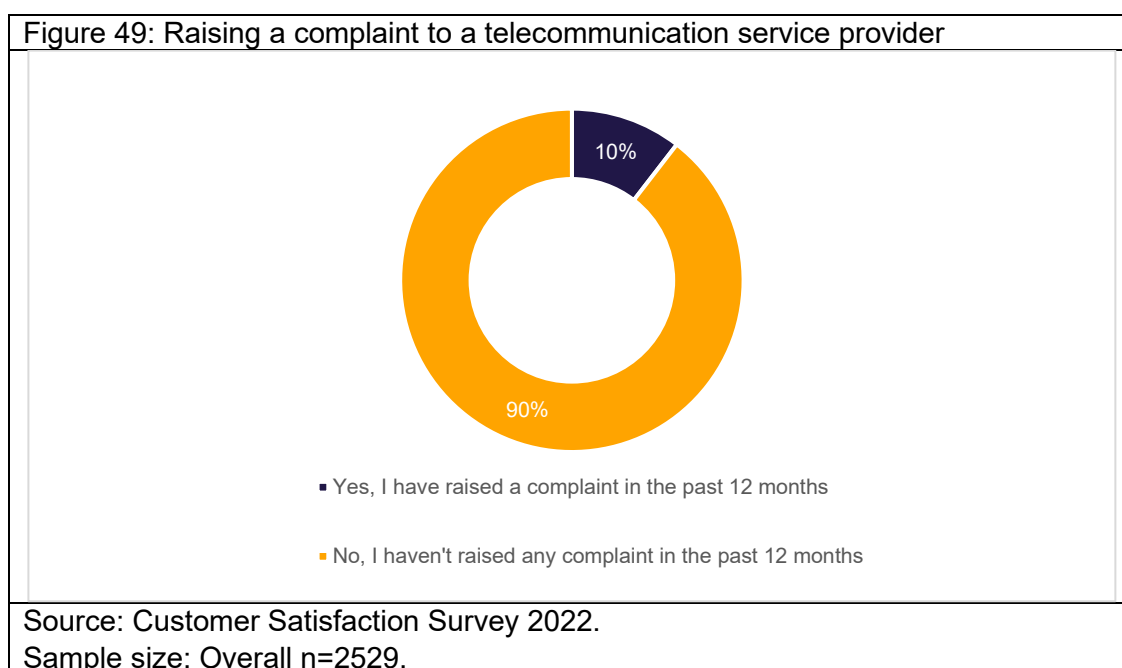
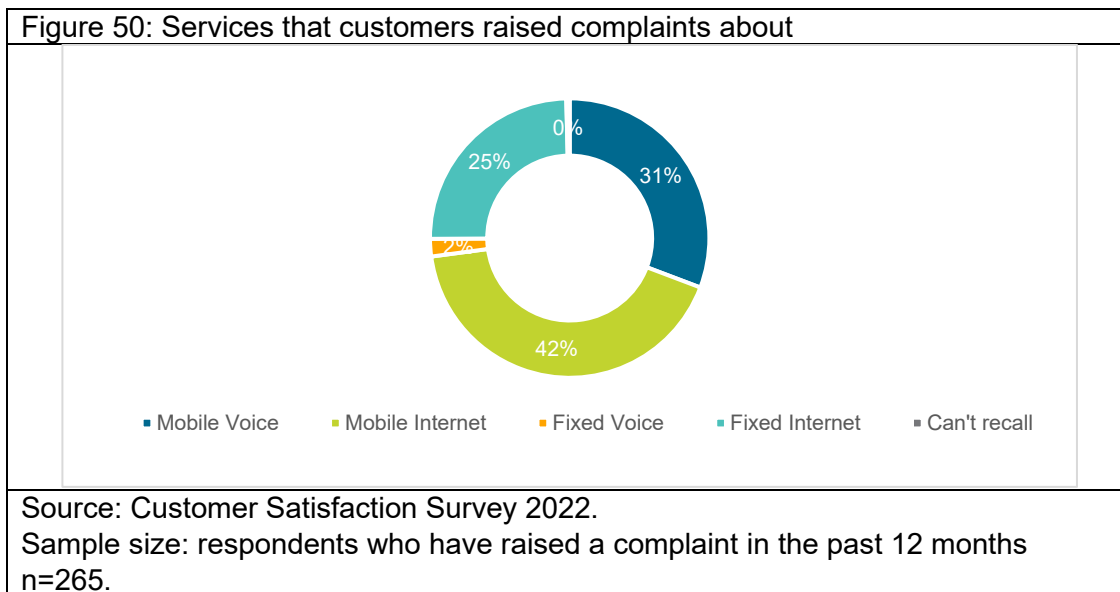


Figure 50: Services that customers raised complaints about



Overall, the proportion of consumers who have raised a complaint to their main service provider has dropped over the past four years from 21% in 2018 down to 10% in 2022. Comparison between 2018 and 2022 results show that complaints about mobile voice services decreased while complaints about internet services increased (both mobile and fixed).

Table 184: Raising a complaint to a telecommunication service provider, 2018 vs 2022

	2018	2022
Sample	2362	2529
Yes, I have raised a complaint in the past 12 months	21%	10%
No, I haven't raised any complaint in the past 12 months	79%	90%

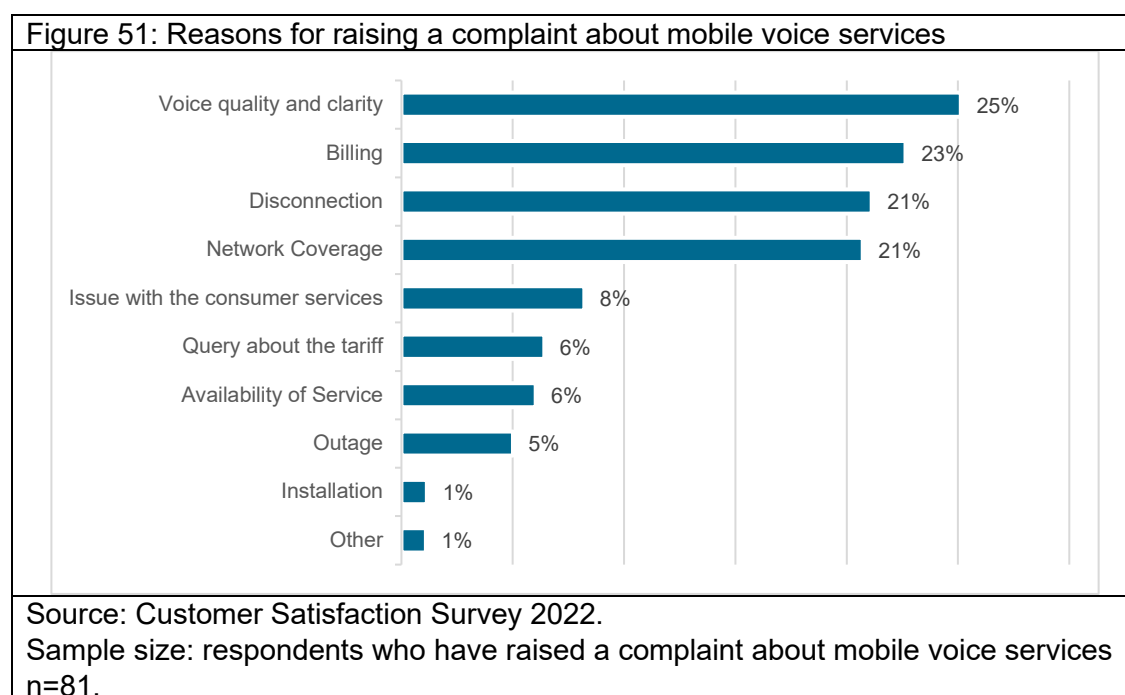
Source: Customer Satisfaction Survey 2018 and 2022.

Table 185: Services that customers raised complaints about, 2018 vs 2022

	2018	2022
Sample	496	265
Mobile Voice	47%	31%
Mobile Internet	31%	42%
Fixed Voice	4%	2%
Fixed Internet	18%	25%

Source: Customer Satisfaction Survey 2018 and 2022.
Base of respondents who have raised a complaint in the past 12 months.

Three in ten of those who raised a complaint in the past 12 months, raised the complaint about Mobile Voice services. Of these, a quarter of respondents raised a complaint about the voice quality and clarity the call, 23% raised a complaint about billing, 21% raised a complaint about disconnection, and a further 21% raised a complaint about network coverage. Other complaints raised related to issues with customer service, queries about tariffs, availability of service, outage, and installation. See figure 51.



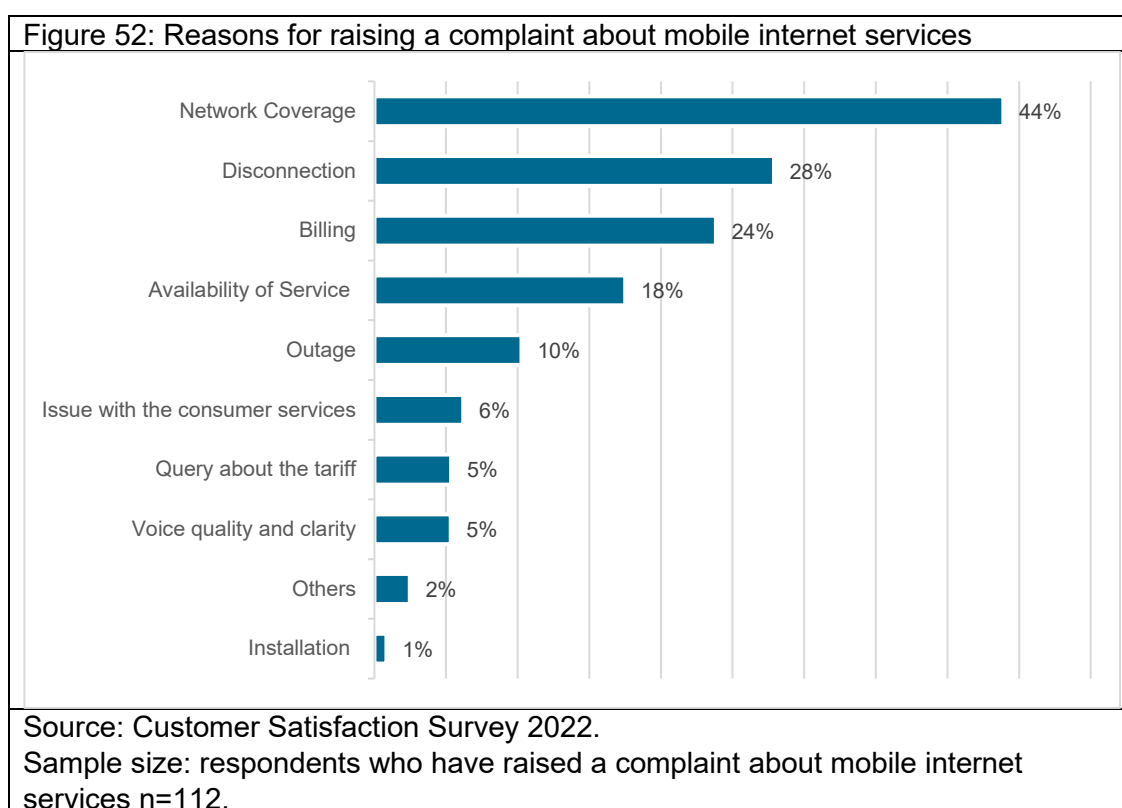
The main reasons for raising a complaint about the mobile voice services have slightly changed since 2018. Complaints about the network coverage, installation and activation issues, and recharge problems have significantly declined while results show inclines for issues with voice quality and clarity, billing, and disconnection.

Table 186: Reasons for raising a complaint about mobile voice services, 2018 vs 2022		
	2018	2022
Sample	233	81
Voice quality and clarity	18%	25%
Billing	17%	23%
Disconnection	15%	21%
Network Coverage	27%	21%

Issue with the consumer services	0%	8%
Query about the tariff	0%	6%
Availability of Service	0%	6%
Outage	0%	5%
Installation/Activation issues	11%	1%
Recharge problems	19%	0%
Additional services added and charged	17%	0%

Source: Customer Satisfaction Survey 2018 and 2022.
Base of respondents who have raised a complaint about mobile voice services.

Four in ten of those who raised a complaint in the past 12 months, raised the complaint about Mobile Internet services. Of these, the biggest complaint related to network coverage (44%). Just over a quarter of respondents (28%) had raised a complaint about disconnection, 24% had raised a complaint about billing, 18% had raised a complaint about availability of service, and a further 10% had raised a complaint about outage. Other complaints related to issues with customer service, queries about the tariff, voice quality and clarity and installation. See Figure 52.



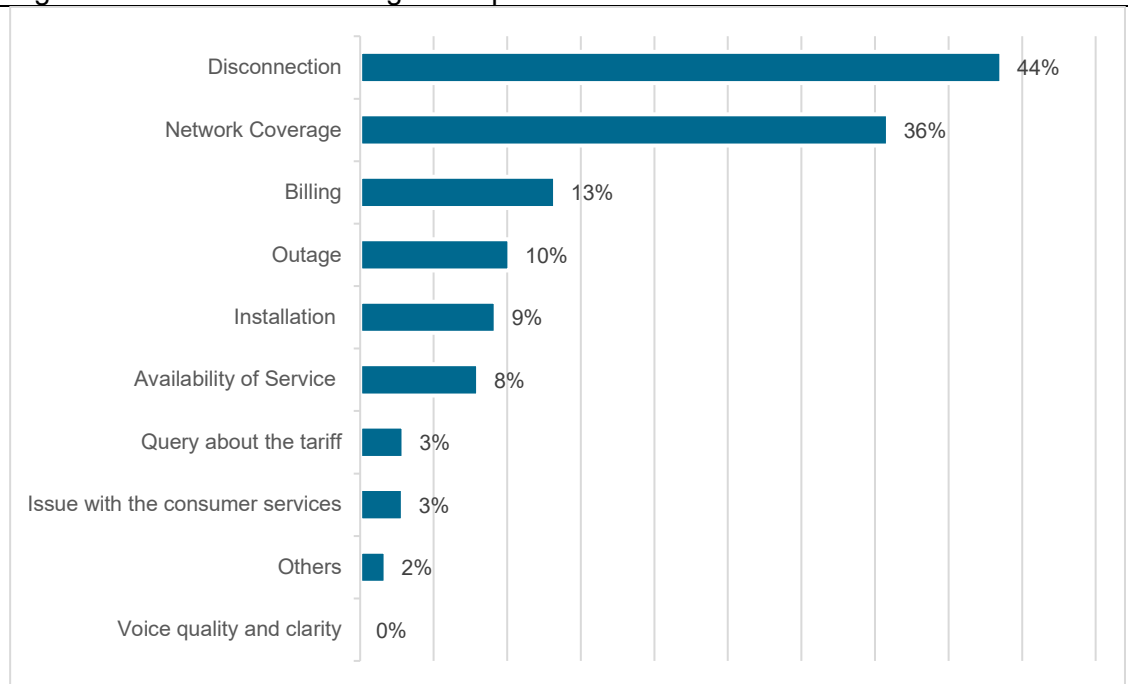
The main reasons for raising a complaint about mobile internet services also have changed over

the past four years with a significant incline for issues with network coverage, disconnection, billing, availability of service, and outage. There has also been a decline in terms of complaints about data speed.

Table 187: Reasons for raising a complaint about mobile internet services, 2018 vs 2022		
	2018	2022
Sample	152	112
Network Coverage	20%	44%
Disconnection	11%	28%
Billing	10%	24%
Availability of Service	0%	18%
Outage	0%	10%
Issue with the consumer services	0%	6%
Query about the tariff	0%	5%
Voice quality and clarity	0%	5%
Installation / Activation	9%	1%
Data Speed	28%	0%
Recharge problems	8%	0%
Additional services added and charged	7%	0%
Source: Customer Satisfaction Survey 2018 and 2022. Base of respondents who have raised a complaint about mobile internet services.		

A quarter of those who had raised a complaint with a telecommunication provide in the past 12 months had raised the complaint about fixed internet services. 44% of these complaints related to disconnection, 36% related to network coverage, 13% related to billing and 10% related to outages. Other complaints were regarding installation, availability of service, queries about the tariff, and issues with customer service. See figure 53.

Figure 53: Reasons for raising a complaint about fixed internet services



Source: Customer Satisfaction Survey 2022.

Sample size: respondents who have raised a complaint about fixed internet services n=65.

Consistent with 2018 results, the main reason for raising a complaint about fixed internet services in 2022 remains disconnection issues with a rise from 31% up to 44%. However, the comparison between 2018 and 2022 also show significant change when it comes to other reasons for the complaints. The biggest change is observed for the incline for network coverage from 0% in 2018 up to 36% in 2022.

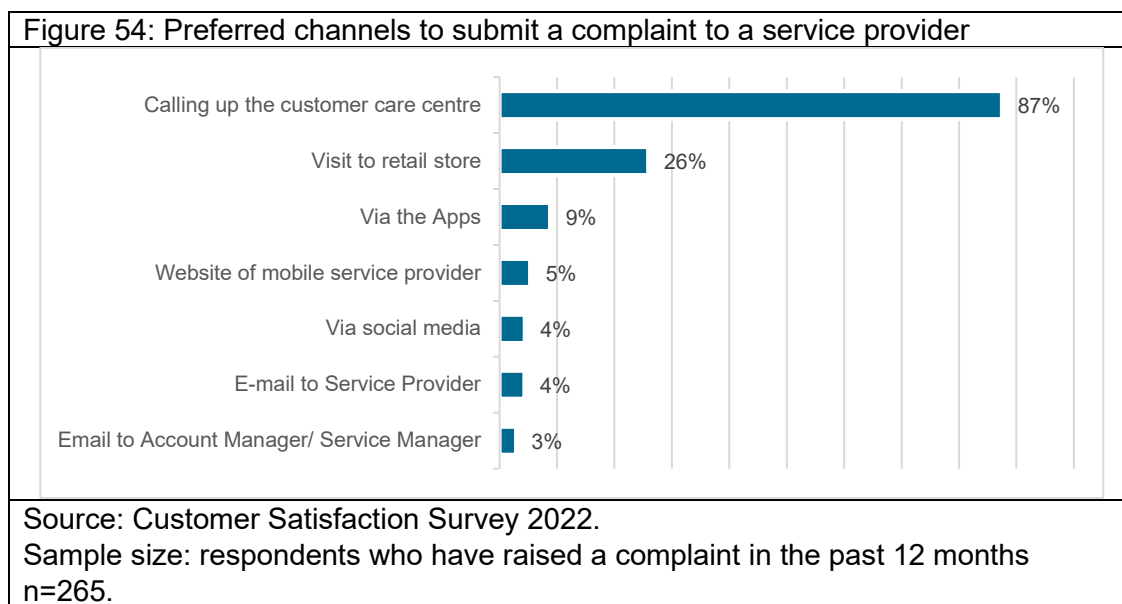
Table 188: Reasons for raising a complaint about fixed internet services, 2018 vs 2022

	2018	2022
Sample	95	65
Disconnection	31%	44%
Network Coverage	0%	36%
Billing	16%	13%
Outage	15%	10%
Installation issues	19%	9%
Availability of Service	0%	8%
Query about the tariff	0%	3%

Issue with the consumer services	0%	3%
Data speed	29%	0%
Activation issues	21%	0%

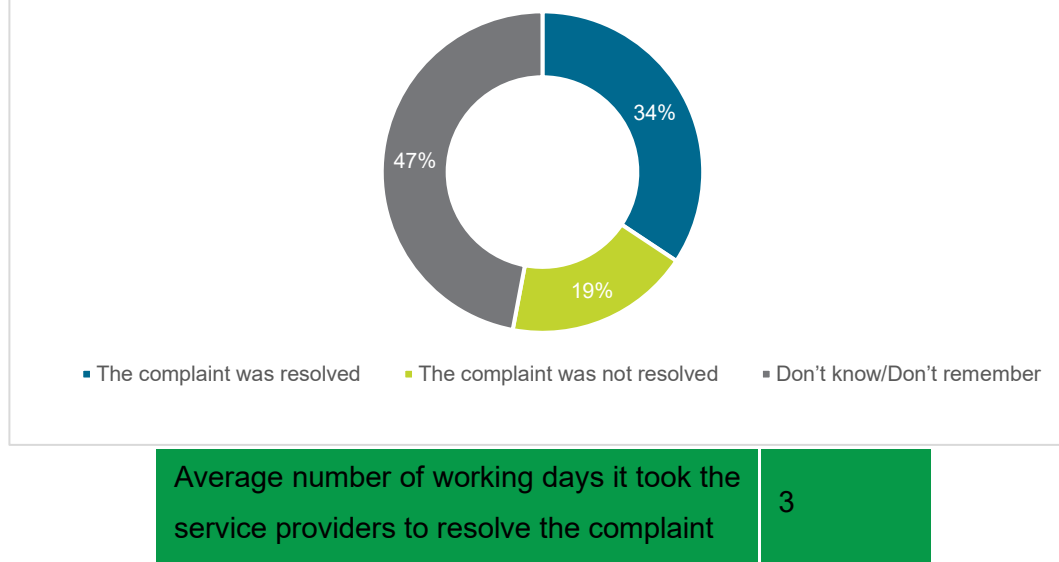
Source: Customer Satisfaction Survey 2018 and 2022.
Base of respondents who have raised a complaint about fixed internet services.

Respondents who had raised a complaint in the past 12 months were asked what their preferred channels to submit a complaint to a service provider were. 87% of respondents said that their preferred channel to submit a complaint to a service provider was by calling the customer care center. A quarter of respondents (26%) said that their preferred channel to submit a complaint was by visiting the retail store, and 9% said that it was via the apps. A few 5% or less said that their preferred channels to submit a complaint to a service provider was via the website of the service provider, via social media, via an email to the service provider or by emailing their account manager/service manager. See Figure 54.



Respondents who had raised a complaint to a service provider in the past 12 months were asked whether or not the complaint was resolved. A large majority (47%) could not remember whether the complaint was resolved or not. 34% stated that the complaint was resolved, compared to 19% who stated that the complaint was not resolved. The average amount of time it took to resolve complaints was 3 days. See Figure 55.

Figure 55: Complaint resolution by service providers

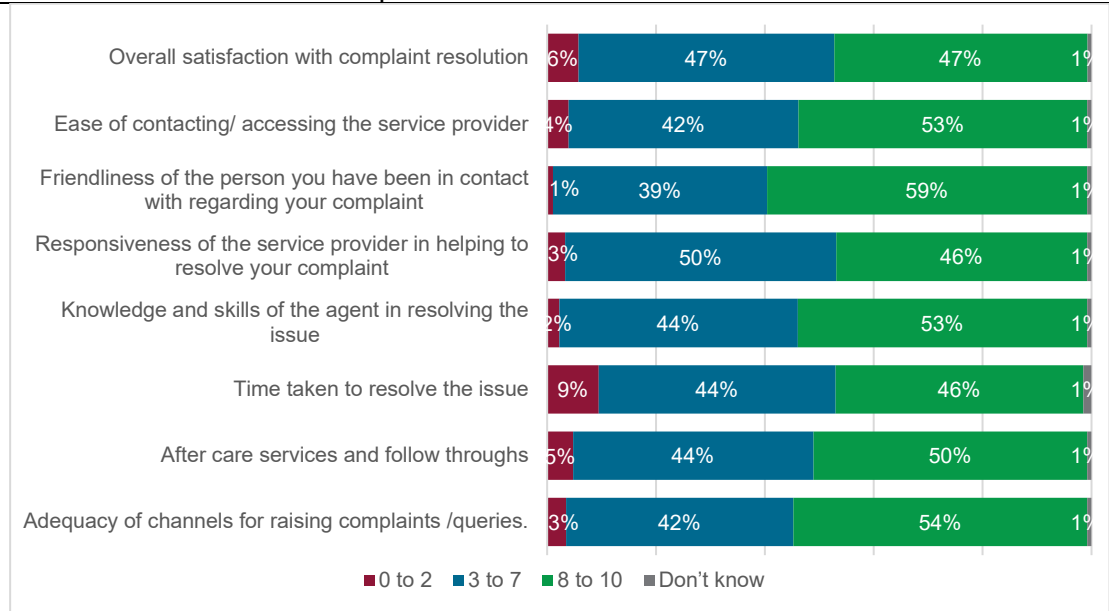


Source: Customer Satisfaction Survey 2022.

Sample size: respondents who have raised a complaint in the past 12 months n=265.

Respondents who had raised a complaint in the past 12 months were asked how satisfied they were with the complaint resolution mechanism of telecommunications service providers. The largest area of satisfaction (a score of 9 or 10) was regarding the friendliness of the person they had been in contact with regarding their complaint (36%). The lowest area of satisfaction (a score of 1 or 2) was with the time taken to resolve the issue (18%). See Figure 56.

Figure 56: Satisfaction with the complaint resolution mechanism of telecommunications service providers



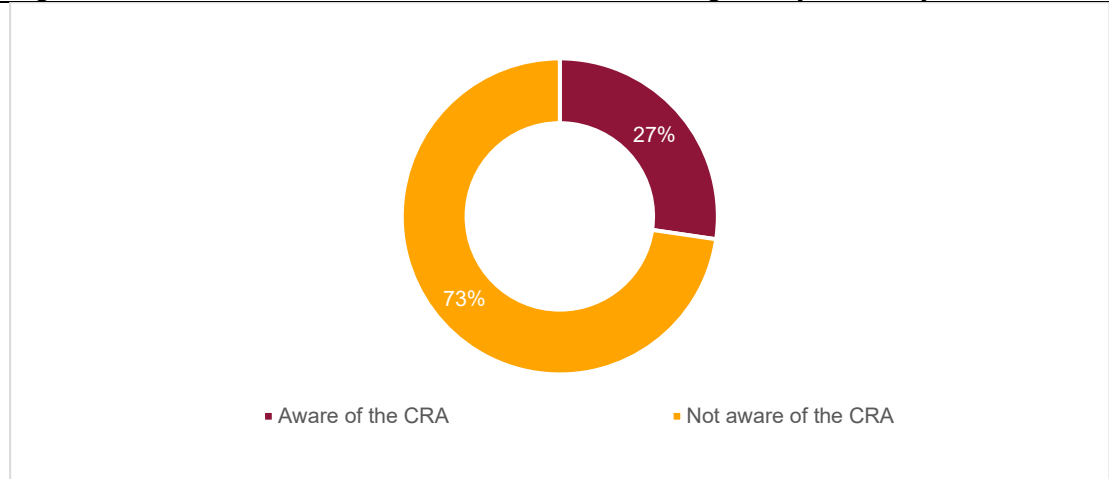
Source: Customer Satisfaction Survey 2022.

Sample size: respondents who have raised a complaint in the past 12 months n=265.

3.12 Perceptions on the Communications and Regulatory Authority

Respondents were asked whether or not they were aware of the Communications and Regulatory Authority. A large majority (73%) indicated that they were not aware of the CRA. See Figure 57.

Figure 57: Awareness of the Communications and Regulatory Authority

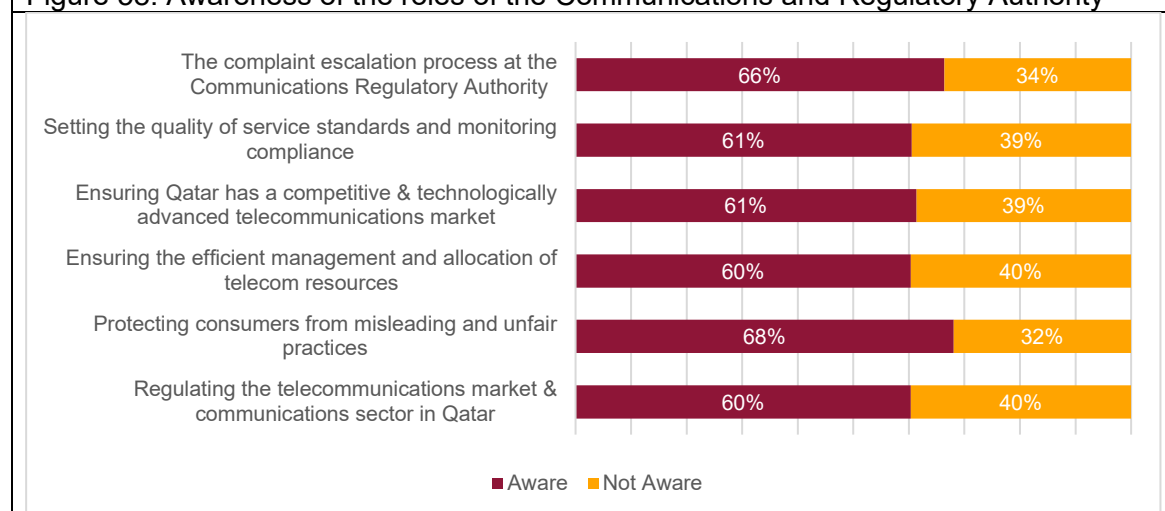


Source: Customer Satisfaction Survey 2022.

Sample size: Overall n=2529.

A quarter of respondents (27%) stated that they were aware of the CRA. Of these, 68% were aware that one of the roles of the CRA is to protect consumers from misleading and unfair practices, and 61% were aware that the CRA was responsible for setting the quality of services standards and monitoring compliance, as well as ensuring Qatar has a competitive and technologically advanced telecommunications market. 40% of these respondents stated that they were not aware that one of the CRA's roles was to ensure the efficient management and allocation of telecom resources, or to regulate the telecommunications market and communications sector in Qatar. See Figure 58.

Figure 58: Awareness of the roles of the Communications and Regulatory Authority



Source: Customer Satisfaction Survey 2022.

Sample size: respondents who are aware of the CRA n=265.

Awareness of the CRA improved over the past four years from 14% in 2018 up to 27% in 2022. In addition, the comparison between 2018 and 2022 results shows that the awareness of the roles of the CRA has also improved as shown in the table below.

Table 189: Awareness of the Communications and Regulatory Authority and its roles, 2018 vs 2022

	2018	2022
Sample	2362	2529
Awareness of the CRA	14%	27%

Regulating the telecommunications market & communications sector in Qatar	54%	60%
Protecting consumers from misleading and unfair practices	67%	68%
Ensuring the efficient management and allocation of telecom resources	41%	60%
Ensuring Qatar has a competitive & technologically advanced telecommunications market	21%	61%
Setting the quality of service standards and monitoring compliance	40%	61%
The complaint escalation process at the Communications Regulatory Authority	33%	66%

Source: Customer Satisfaction Survey 2018 and 2022.
Base respondents for the awareness of CRA's roles: respondents who are aware of the CRA: n=342 for 2018 and n=265 for 2022.

Of those respondents who were aware of the complaint escalation process, a large majority (98%) had not raised a complaint to the CRA. See Figure 59.

Of those who had raised a complaint to the CRA, 25% scored the CRA with either a 9 or a 10 (extremely satisfied) on the complaint resolution process. However, the base for this score is very low and should not be considered for the development of any recommendations or action plan. See Figure 60.

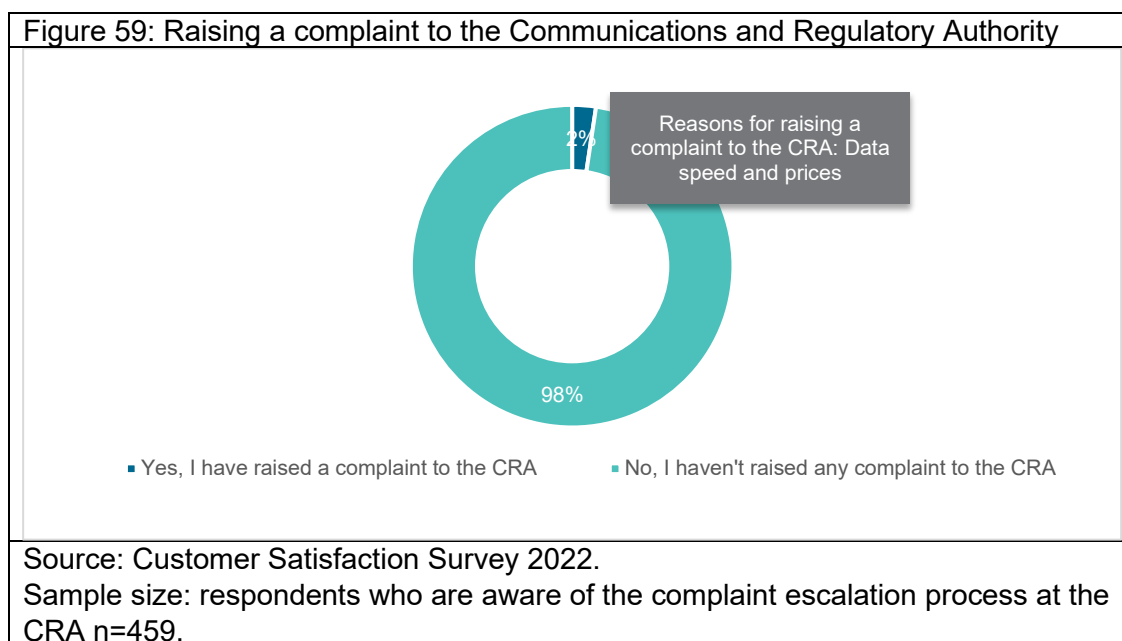
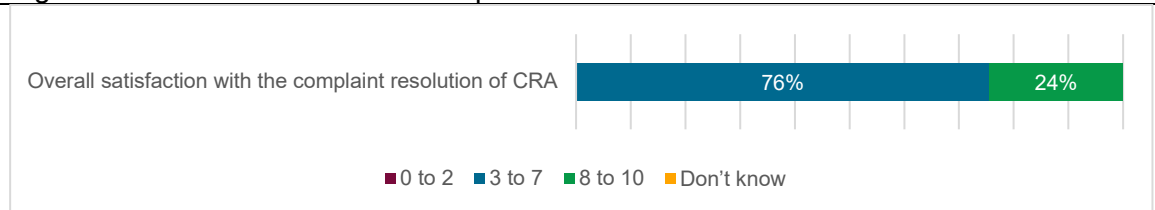


Figure 60: Satisfaction with the complaint resolution mechanism of the CRA



Source: Customer Satisfaction Survey 2022.
 Sample size: respondents who have raised a complaint to the CRA n=11.
 Note: The sample size is very small and therefore the results should not be considered for the development of recommendations or any action plan.

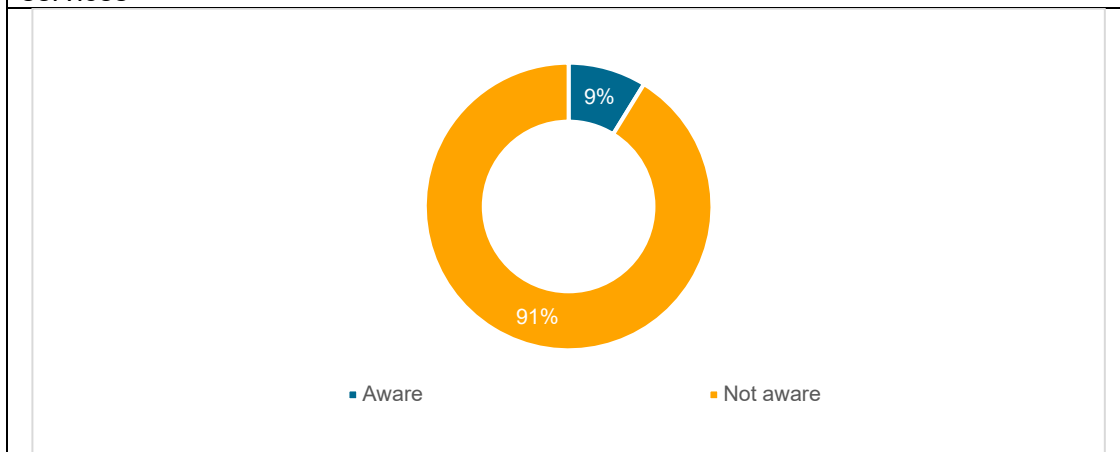
3.13 Consumer rights protection

Respondents were asked if they were aware of any misleading advertisements related to telecommunication services. 91% of respondents stated that they were not aware of any such advertisements. See Figure 61.

Of those who stated that they were aware of misleading advertisements related to telecommunication (9%) the reasons to believe the advertisements were misleading were related to an offer being misleadingly described as free (54%), a false claim that an offer would be available for an unlimited amount of time (38%), a price that was not displayed (37%), a description of a service that was misleading (32%), a service or a product that was purchased that did not reflect the quality that was promised (20%), and a service or a product that was purchase that did not reflect the quality indicated by the price (17%). See Figure 62.

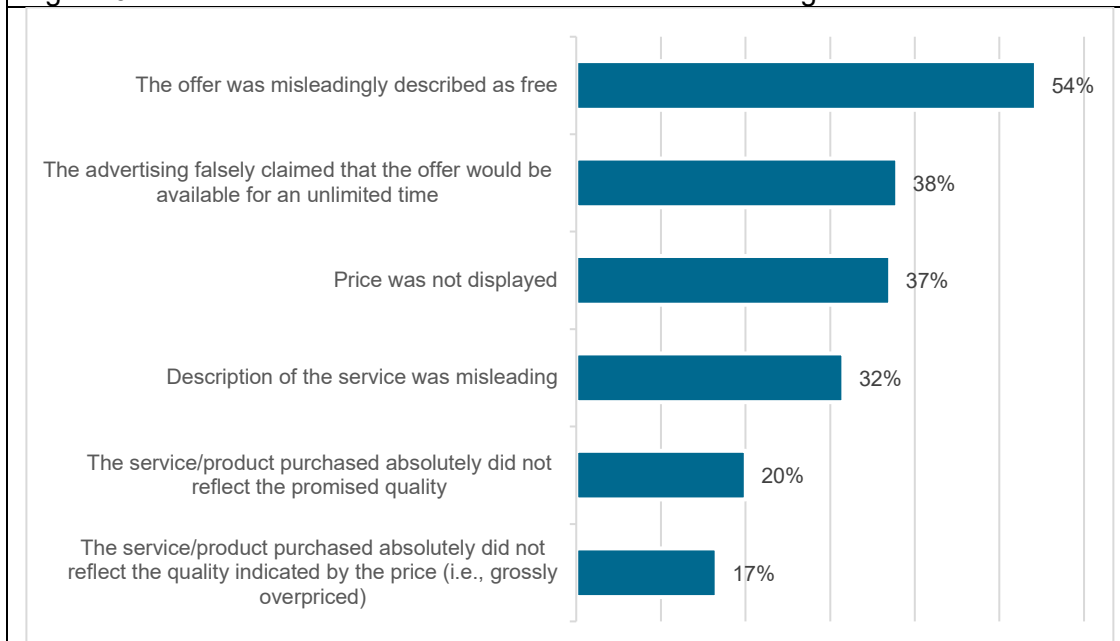
Of those respondents who were aware of misleading advertisements, 51% claimed that misleading advertisements came from Ooredoo Qatar Q.P.S.C, 18% claimed that they came from Vodafone Qatar P.Q.S.C, and 31% said that both service providers had been responsible for the misleading advertisement. See Figure 63.

Figure 61: Awareness of any misleading advertisement related to telecommunication services



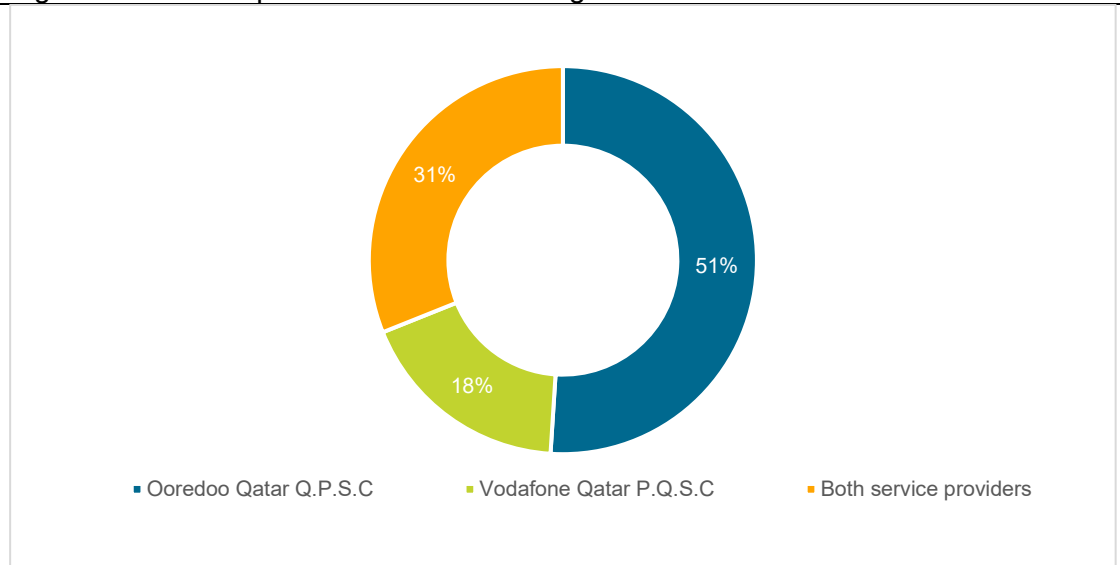
Source: Customer Satisfaction Survey 2022.
Sample size: Overall n=2529.

Figure 62: Reasons to believe advertisements are misleading



Source: Customer Satisfaction Survey 2022.
Sample size: respondents who are aware of misleading advertisements related to telecommunication services n=222.

Figure 63: Service providers with misleading advertisements



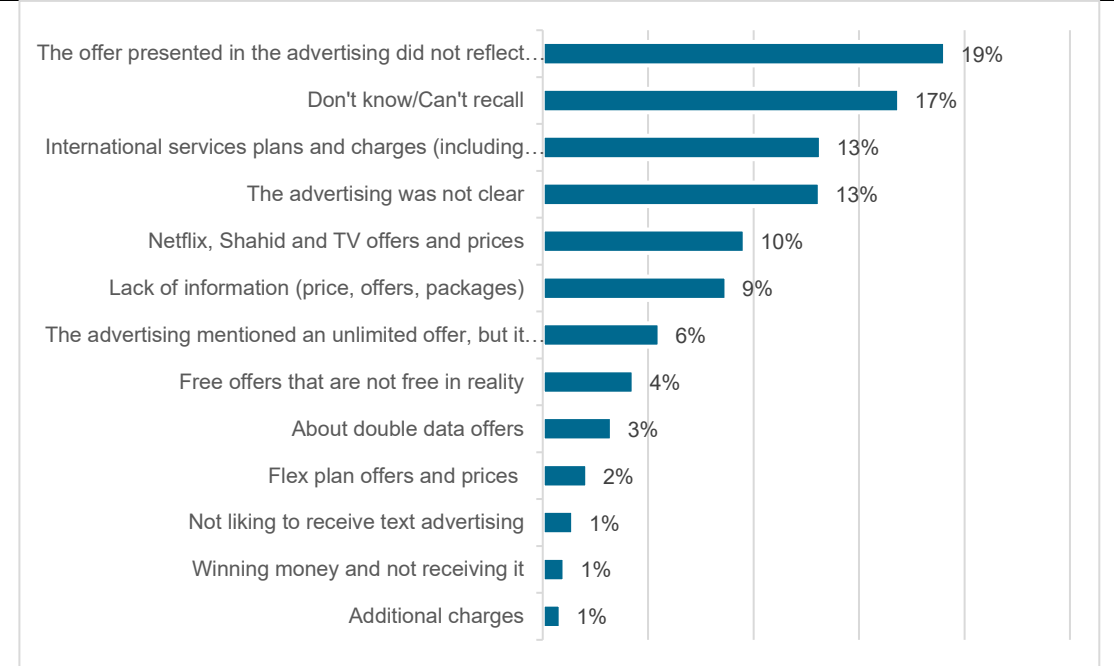
Source: Customer Satisfaction Survey 2022.
Sample size: respondents who are aware of misleading advertisements related to telecommunication services n=222.

Proportion of the respondents who are aware of any misleading advertisement has very slightly increased in 2022 when compared to 2018. However, the results show a significant increase in the proportion of consumers who believe Ooredoo Qatar P.Q.S.C has a misleading advertisement, from 16% in 2018 up to 51% in 2022.

Table 190: Awareness of misleading advertisement related to telecommunication services, 2018 vs 2022		
	2018	2022
Sample	2362	2529
Proportion of respondents who are aware of any misleading advertisement	5%	9%
Proportion of respondents who believe Ooredoo Qatar Q.P.S.C has a misleading advertisement	16%	51%
Proportion of respondents who believe Vodafone Qatar P.Q.S.C has a misleading advertisement	16%	18%
Proportion of respondents who believe both service providers have misleading advertisements	68%	31%

Source: Customer Satisfaction Survey 2018 and 2022.
Base of respondents who are aware of misleading advertisement related to telecom services: n=103 for 2018 and n=222 for 2022.

Figure 64: Latest misleading advertisement and reasons to believe it is misleading

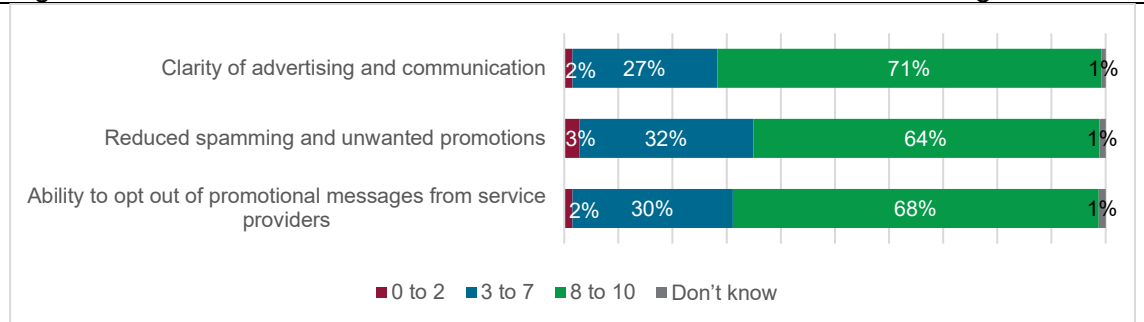


Source: Customer Satisfaction Survey 2022.

Sample size: respondents who are aware of misleading advertisements related to telecommunication services n=222.

Respondents were asked how satisfied they were with factors related to telecommunication advertising. 48% of respondents gave a score of either 9 or 10 (extremely satisfied) with the clarity of advertising and communication. 37% of respondents gave a score of 9 or 10 (extremely satisfied) with reduced spamming and unwanted promotions, and 45% gave a score of 9 or 10 (extremely satisfied) with the ability to opt out of promotional messages from service providers. See Figure 65.

Figure 65: Satisfaction with factors related to telecommunication advertising

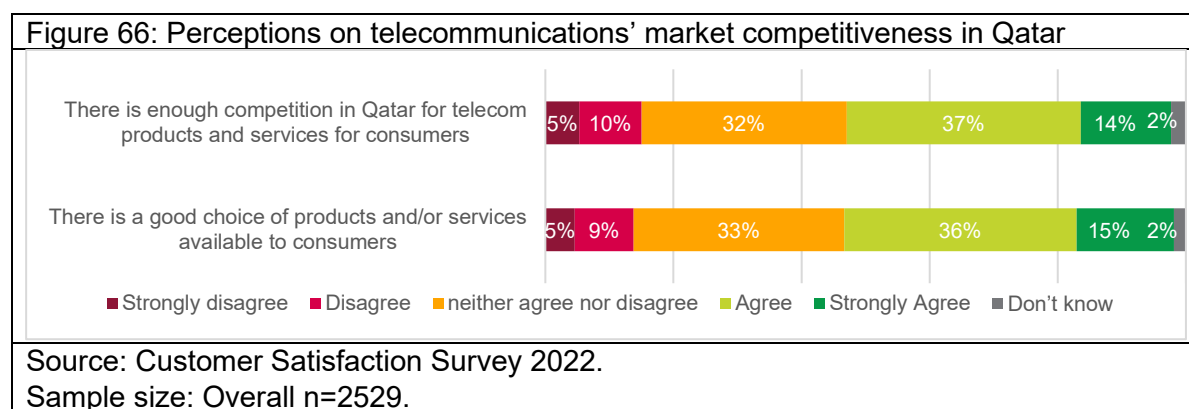


Source: Customer Satisfaction Survey 2022.

Sample size: Overall n=2529.

3.14 Market competitiveness

Respondents were asked their perceptions on the telecommunications market competitiveness in Qatar. 51% of respondents either agreed or strongly agreed with the statement that ‘there is enough competition in Qatar for telecom products and services for consumers’, while 15% either disagreed or strongly disagreed with the statement. Likewise, 51% of respondents agreed with the statement ‘there is a good choice of products and/or services available to consumers, while 14% either disagreed or strongly disagreed with the statement. See Figure 66.



Overall, perceptions on telecommunications’ market competitiveness are consistent when comparing 2018 and 2022 results. However, a decline is observed for the proportion of consumers who believe there is a good choice of products and/or services available in Qatar.

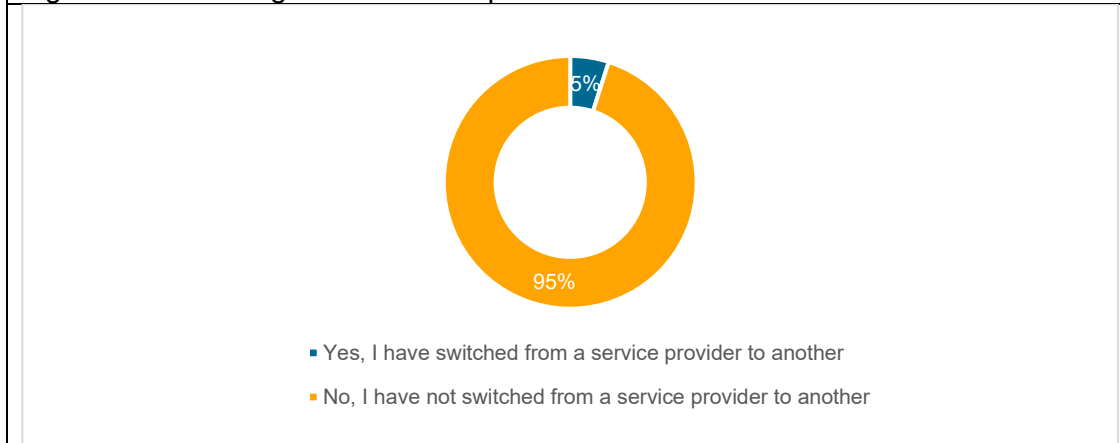
Table 191: Perceptions on telecommunications’ market competitiveness in Qatar, 2018 vs 2022		
	2018	2022
Sample	2362	2529
There is enough competition in Qatar for telecom products and services for consumers	50%	51%
There is a good choice of products and/or services available to consumers	58%	51%

Source: Customer Satisfaction Survey 2018 and 2022.
Proportion of respondents who have responded either ‘Agree’ or ‘Strongly Agree’ to the statements.

Respondents were asked whether they had switched from one service provider to another. 95% claimed that they had not switched from one service provider to another. See Figure 67.

Of those who had switched service providers (5%), the reasons for switching service provider were prices and charges (32%), offers/packages in general (25%) and network related issues (13%). See Figure 68.

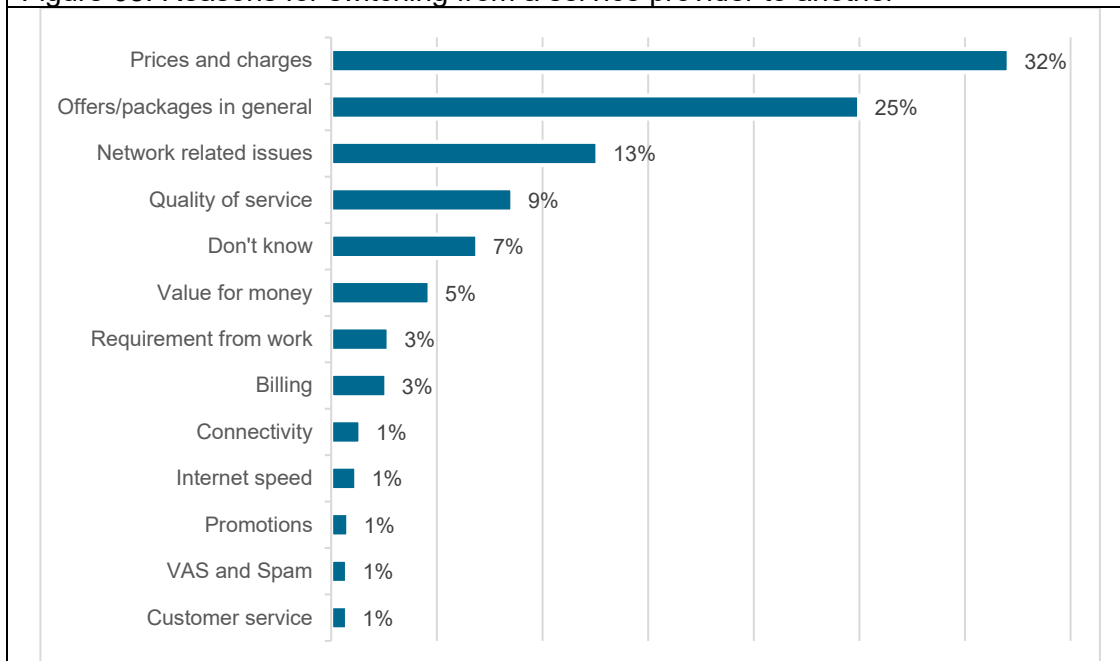
Figure 67: Switching from a service provider to another



Source: Customer Satisfaction Survey 2022.

Sample size: Overall n=2529.

Figure 68: Reasons for switching from a service provider to another

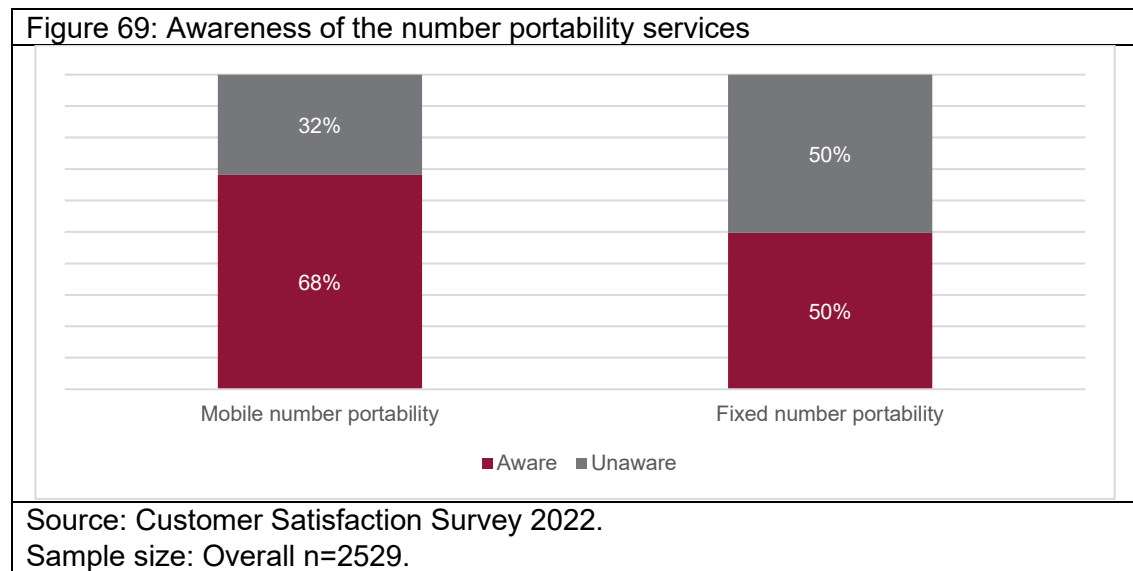


Source: Customer Satisfaction Survey 2022.

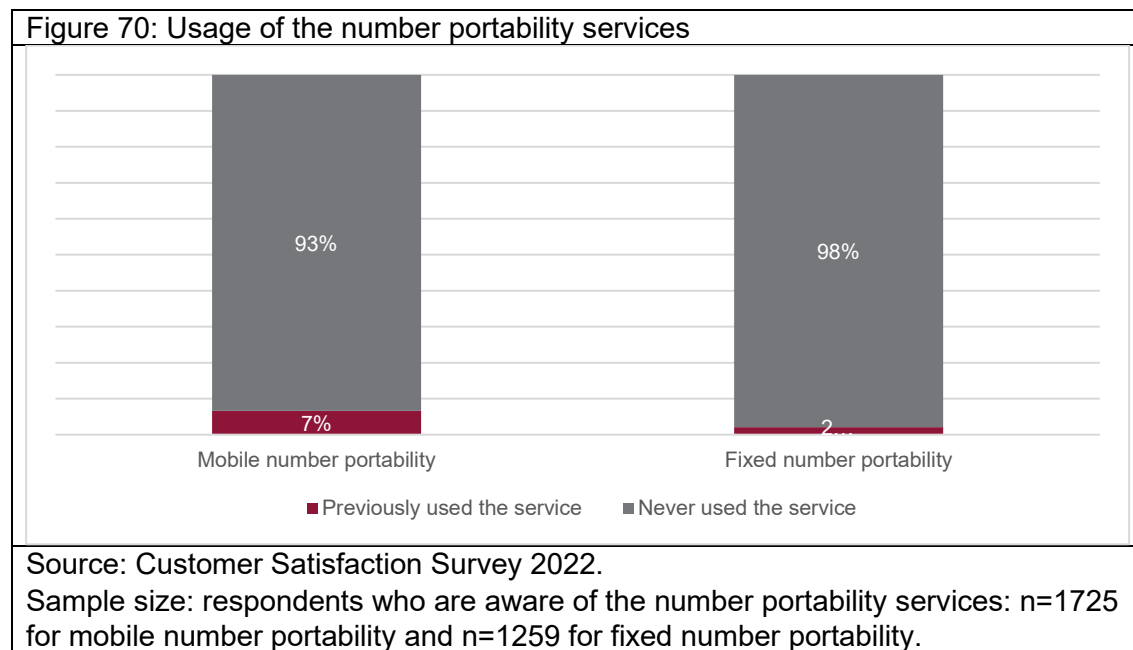
Sample size: respondents who have switched from a service provider to another n=125.

Respondents were asked whether or not they were aware of the number portability services.

68% of respondents claimed that they were aware of number portability services in mobile numbers, and 50% claimed that they were aware of number portability services in fixed numbers. See Figure 69.



Of those aware of the number portability services, only 7% had ever used previously used this service for their mobile number, and only 2% had previously ever used this service for their fixed number. See Figure 70.

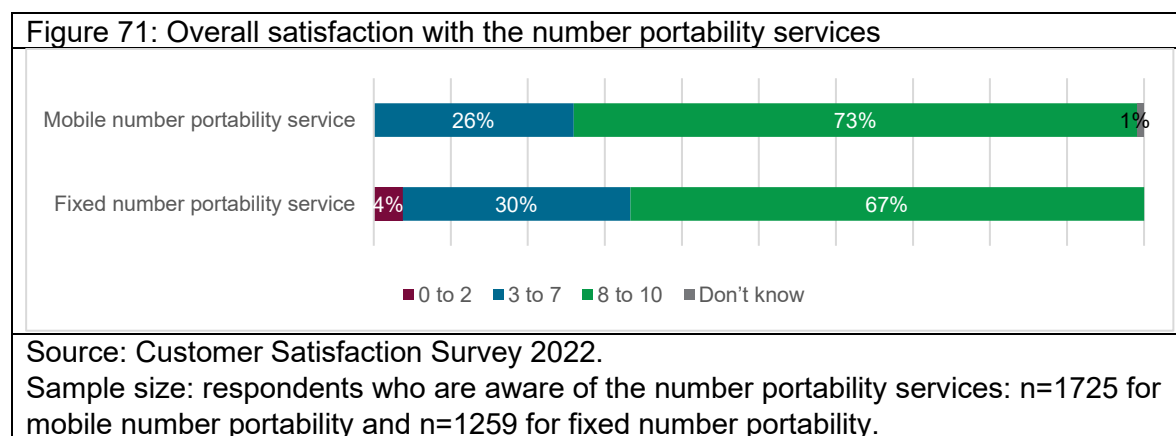


The proportion of users of mobile number portability services remains consistent over the past four years as shown in the table below.

	2018	2022
Sample	2362	1725
Proportion of respondents who have used the mobile number portability services	6%	7%

Source: Customer Satisfaction Survey 2018 and 2022.
Base of respondents for 2022: respondents who are aware of the mobile number portability services.

Respondents who were aware of the mobile portability services were also asked about their satisfaction with these services. 53% of respondents who were aware of mobile portability services gave a satisfaction score of 9 or 10 (extremely satisfied) with these services. 35% of respondents who were aware of fixed portability services gave a satisfaction score of 9 or 10 (extremely satisfied) with these services. See Figure 71.

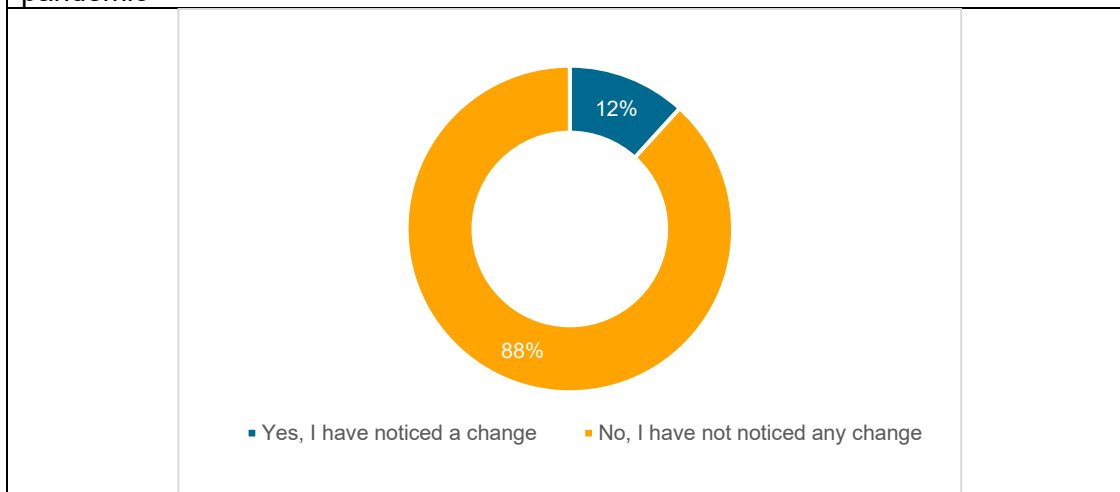


3.15 Changes due to COVID-19

Respondents were asked if they had noticed any changes in telecommunication services due to the Coronavirus pandemic. 88% state that they have not noticed any changes in telecommunication services due to the pandemic. See Figure 72. Those who have noticed a change in telecommunication services due to the pandemic (12%) state that this change relates to changes in network (20%), changes in offers, competitive offers and promotions (19%), changes in internet quality overall and internet speed (16%) and changes in usage of services

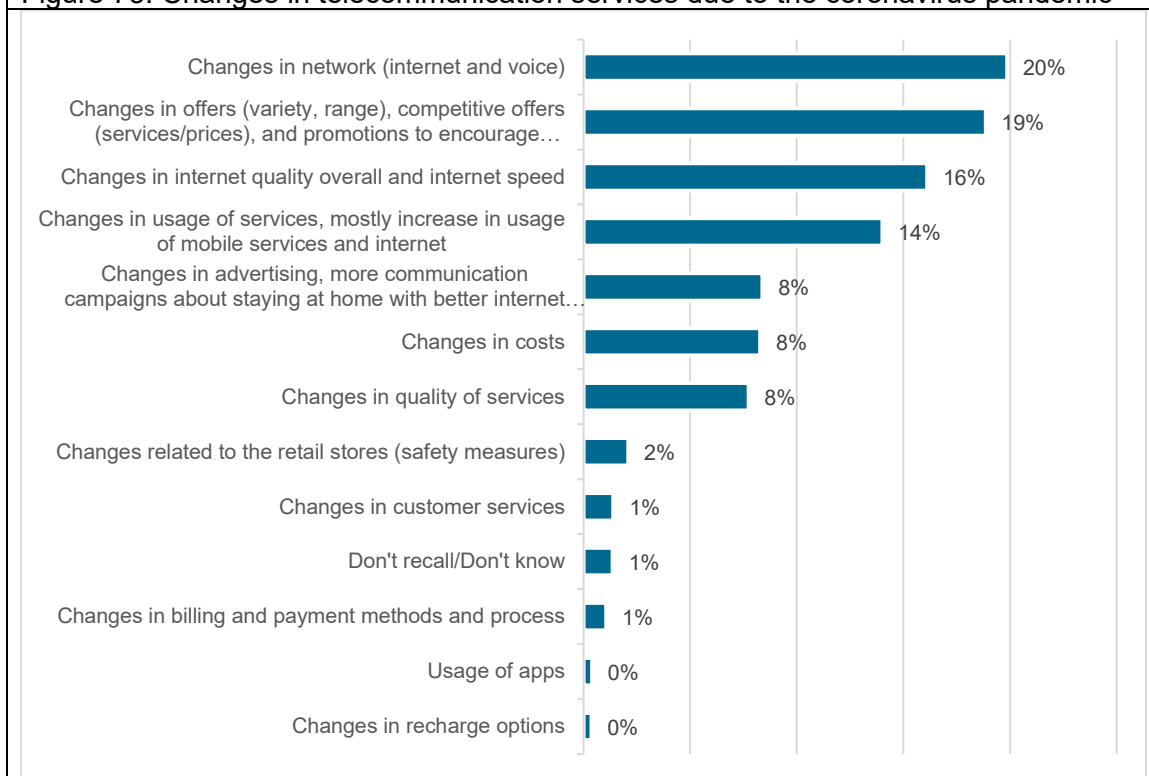
(14%). See Figure 73.

Figure 72: Noticing changes in telecommunication services due to the coronavirus pandemic



Source: Customer Satisfaction Survey 2022.
Sample size: Overall n=2529.

Figure 73: Changes in telecommunication services due to the coronavirus pandemic

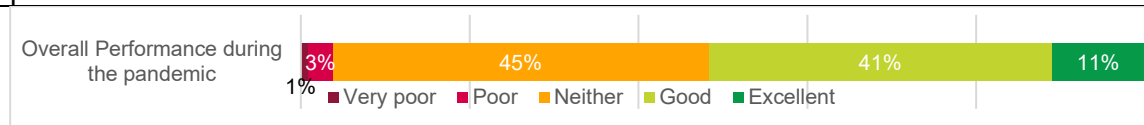


Source: Customer Satisfaction Survey 2022.

Sample size: respondents who have noticed a change in telecommunication services due to the pandemic n=297.

Respondents were asked about their perceptions on the overall performance of the service providers during the pandemic. 52% of respondents claim that the overall performance of the service providers during the pandemic was either Good or Excellent. See Figure 74.

Figure 74: Perceptions on the overall performance of the service providers during the pandemic



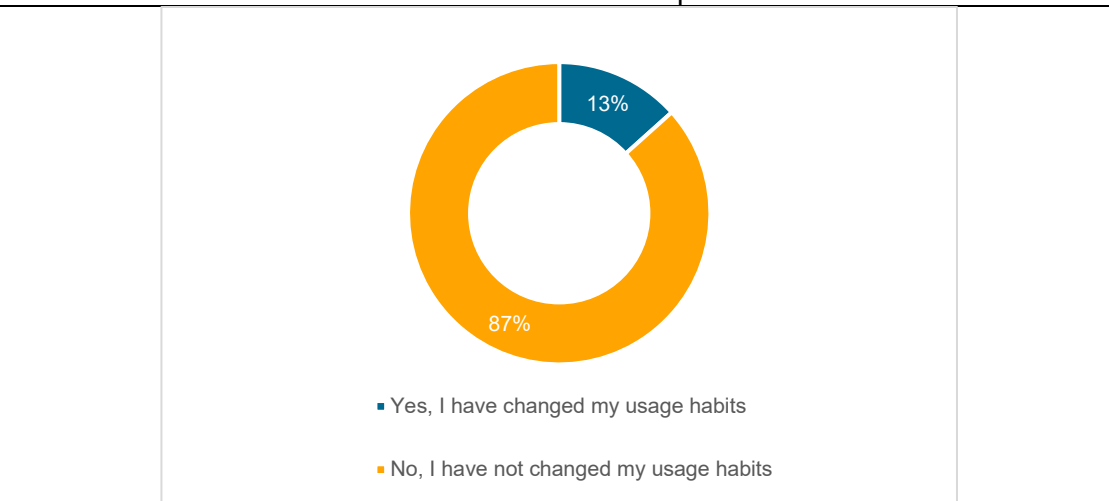
Source: Customer Satisfaction Survey 2022.

Sample size: Overall n=2529.

Respondents were asked if they had changed their usage habits in terms of telecommunication services due to the coronavirus pandemic. 87% of respondents state that they have not changed their usage habits due to the pandemic. See Figure 75.

Those respondents who had changed their habits due to the pandemic (13%) did so by increasing their usage of internet and calls (80%). See Figure 76.

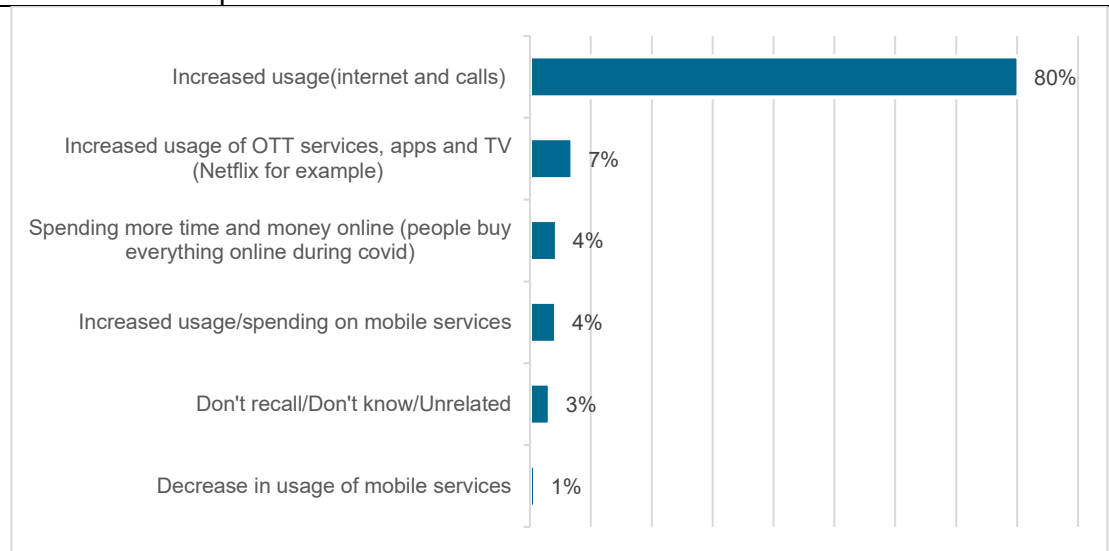
Figure 75: Proportion of residents who have changed their usage habits in terms of telecommunication services due to the coronavirus pandemic



Source: Customer Satisfaction Survey 2022.

Sample size: Overall n=2529.

Figure 76: Changes in usage habits in terms of telecommunication services due to the coronavirus pandemic

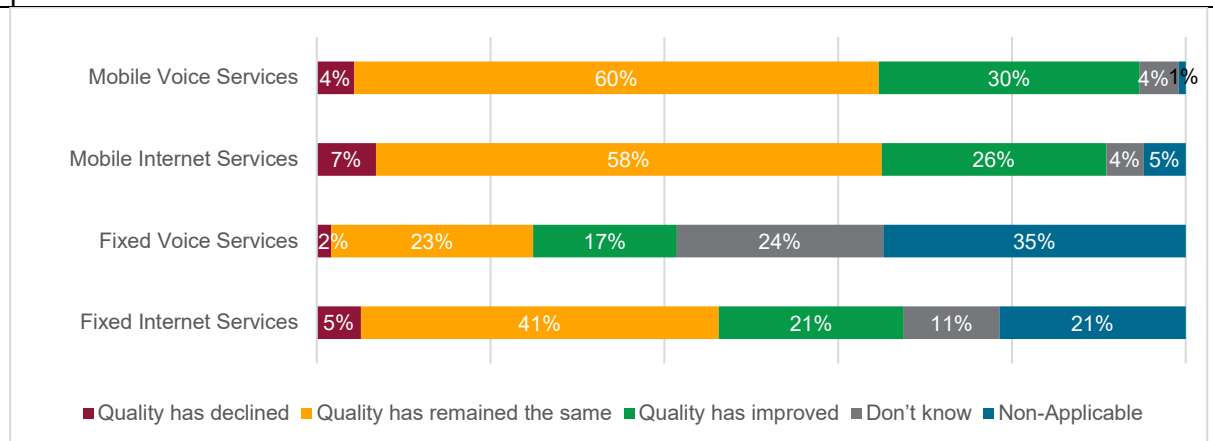


Source: Customer Satisfaction Survey 2022.

Sample size: respondents who have changed their usage habits of telecommunication services due to the pandemic n=338.

Respondents were asked their perceptions on the quality of telecommunication services amid the coronavirus pandemic. For mobile voice services, 30% stated that the quality had improved, while 60% stated that the quality had stayed the same. For mobile internet services, 26% said that the quality had improved, whereas 58% claimed that the quality had stayed the same. See Figure 77.

Figure 77: Perceptions on the quality of telecommunication services amid the coronavirus pandemic

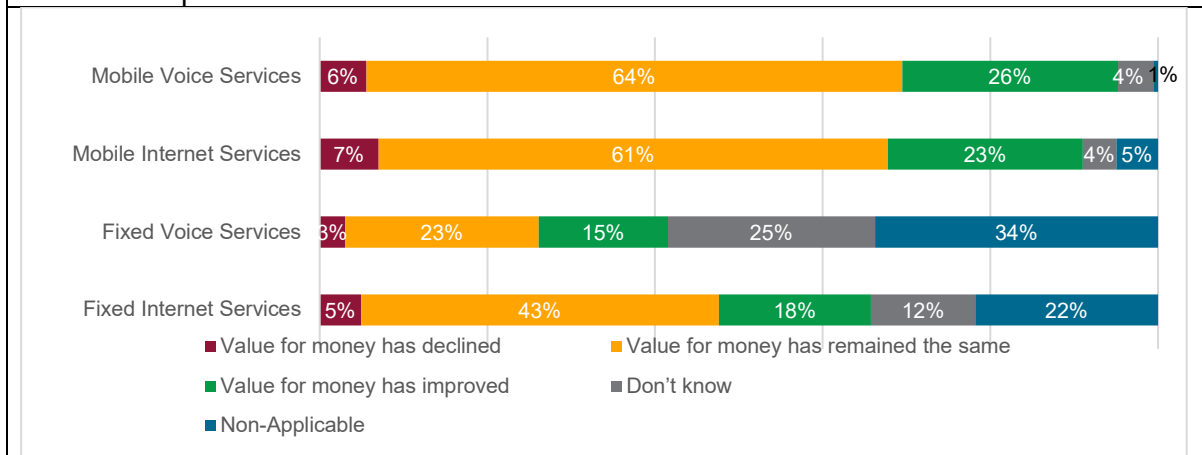


Source: Customer Satisfaction Survey 2022.

Sample size: Overall n=2529.

Respondents were also asked about their perceptions on the value for money of telecommunication services amid the coronavirus pandemic. For mobile voice services, 26% of respondents stated that value for money has improved, while 64% stated that it has stayed the same. For Mobile internet services, 23% stated the value for money had improved, while 61% claimed that it had stayed the same. See Figure 78.

Figure 78: Perceptions on the value for money of telecommunication services amid the coronavirus pandemic



Source: Customer Satisfaction Survey 2022.
Sample size: Overall n=2529.

4. Key Takeaways for CRA

The Consumer Satisfaction Survey has provided some key insights into the strengths and weakness of the telecommunication market in Qatar. The following table shows the classification of key customer interaction aspects based on the percentage of consumers who rate their satisfaction from '8' to '10' on a 11-points scale. Indicators with a satisfaction score of 75% or higher are to be considered as key leveraging strength for the market while indicators with a satisfaction score of less than 75% are key improvement areas with those scoring less than 50% needing to be prioritized.

Product	Overall Experience Area	Customer Interaction Aspect		
		Less than 50%	Between 50% and 75%	75% and higher
Mobile Voice	Network			Network coverage Network Retainability Voice quality and clarity
	Pricing	International call charges International roaming charges	The monthly rental charge (including packages) Local call charges	
	Tariffs		Transparency of prices Variety of rate plans offered	Ease of understanding the service terms and conditions Ease of understanding bundled packages
	Provisioning			Ease of purchasing the services Ease of activating the services Time taken for the service to be activated
	Recharge, billing and payment		Accuracy of the recharge Range of recharge options Validity of recharge	Adequacy of recharge options Ease of recharge options available for bill payments Regularity of receiving bills Accuracy of the bills

				Ease of understanding the bills
Mobile Internet	Network		Network Retainability Internet speed Quality of video access/ streaming	Network Coverage
	Pricing	International roaming charges Data charges (in and off-package)	The monthly rental charge (including packages)	
	Tariffs		Ease of understanding the service terms and conditions Transparency of prices Variety of rate plans offered Ease of understanding bundled packages	
	Provisioning			Ease of purchasing the services Ease of activating the services Time taken for the service to be activated
	Recharge, billing and payment		Adequacy of recharge options Accuracy of the recharge Range of recharge options Ease of recharge Validity of recharge	Options available for bill payments Regularity of receiving bills Accuracy of the bills Ease of understanding the bills
Fixed Voice	Network			Availability of service Voice quality and clarity
	Pricing	International call charges	Initial purchase and installation cost The monthly rental charge (including packages) Local call charges	

	Tariffs			Ease of understanding the service terms and conditions Transparency of prices Variety of rate plans offered Ease of understanding bundled packages
	Provisioning			Ease of purchasing the services Ease of activating the services Time taken for the service to be activated
	Recharge, billing and payment			Options available for bill payments Regularity of receiving bills Accuracy of the bills Ease of understanding the bills
Fixed Internet	Network		Internet speed Quality of video access/streaming	Availability of service
	Pricing	Data charges	Initial purchase and installation cost The monthly rental charge (including packages)	
	Tariffs		Transparency of prices	Ease of understanding the service terms and conditions Variety of rate plans offered Ease of understanding bundled packages
	Provisioning			Ease of purchasing the services Ease of activating the services Time taken for the service to be activated

	Recharge, billing and payment			Options available for bill payments Regularity of receiving bills Accuracy of the bills Ease of understanding the bills
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The study results also lead to the following key observations:

- Mobile Internet is one of the most important services to users with 88% of the respondents rating the importance of these services from '7' to '9' on a 9-points scale. The penetration rate for mobile internet services is also very high as 90% of the surveyed consumers use these services. However, less than three quarters of the users of mobile internet services are highly satisfied with the services provided to them. This suggests that there is room for improvement in terms of the quality of the mobile internet services offered in the Qatar market. The survey results show that the satisfaction scores are lower among the males' segment, the non-Qataris segment, and the adults aged 25-34 years old. Residents of Al Wakra and Umm Slal also record the lowest results.
- Satisfaction levels with the services provided by the customer service team are moderate with 68% of the respondents who contacted their service provider indicating a satisfaction rate of '8' to '10'. Improvements can be made in terms of services provided by the call center of the service providers including timeliness to respond to the customer's call, listening to the customer's needs, and providing customers with helpful information. Improvement can also be made in terms of the waiting time at the retail store of the service provider to access the personnel. The survey findings show that females are the least satisfied with the customer services. It is also the case for the non-Qatari respondents compared to the Qatari nationals. The results also highlight that age groups 15-24 and 25-34 years record lowest than average satisfaction scores and that Doha and Al Wakra residents are the least satisfied customers. Key actions should focus on these consumer segments.
- Disconnection, billing, network, voice quality and clarity are the main subjects of the customers' complaints to their service providers. Most complaints were related to mobile services (42% Mobile Internet and 31% Mobile Voice), and to a lesser extent fixed internet services (25%). These results should be taken into consideration for key recommendations about each of the mentioned services.

- Less than half of the customers who made a complaint to their service provider have rated their satisfaction with the complaint resolution process between '8' and '10' (high satisfaction). Actions should be developed and implemented to improve the complaint resolution process of the service providers with a focus on the indicators of responsiveness of the service provider in helping to resolve the complaint and the time taken to resolve the complaint.
- Awareness of the Communications Regulatory Authority (CRA) is low among telecom consumers in Qatar with only a quarter of respondents being aware of the CRA. And among those who are aware of the CRA, six in ten are aware of its roles. Communication about the CRA and its roles would help raise the awareness levels among Qatar's population.
- There is a moderate satisfaction with the factors related to telecommunication advertising as less than three quarters of the surveyed sample are highly satisfied with the clarity of advertising and communication, the ability to opt out of promotional messages from service providers, and reduced spamming and unwanted promotions. The CRA should take actions with regards to regulations about communication and advertising of telecommunication services.
- Only half of the surveyed sample believe there is enough competition in Qatar for telecommunication products and services for consumers and there is a good choice of products and/or services available to them. A wider range of products/services and a larger variety of offers with more competitive prices should be provided on the market for telecom consumers.
- Awareness of mobile and fixed number portability services is moderate in Qatar (68% mobile vs 50% fixed), and less than three quarters of those who have used those services report to be highly satisfied (rate of '8-10'). Improvements can be made to raise awareness about the mobile and fixed number portability services and offering better quality. Further research may be needed to further understand the main reasons for customers' dissatisfaction.

The tables below present the key recommendations for the CRA:

Action areas	Recommendations	CRA Departments involved
Awareness of CRA and its roles	Develop and implement communication campaigns about the CRA and its roles. Communication campaigns should also aim to raise people' awareness about the complaint resolution process of CRA.	Public Relations and Communications Unit Consumers Affairs Department
Market Competitiveness	A wider range of products/services and a larger variety of offers with more competitive prices should be provided on the market for telecom consumers.	Regulation Affairs and Competition Department
Overall quality of service provided by service providers	Overall, there is a need to improve the quality of the mobile internet services offered in the Qatar market. The improvements should focus on the following segments: the male consumers, the non-Qataris, the adults aged 25-34 years old, and mainly residents of Al Wakra and Umm Slal. Satisfaction scores are lower for Vodafone Qatar P.Q.S.C than for Ooredoo Qatar Q.P.S.C which suggests that the former should be implementing more efforts to raise their customer satisfaction levels with their services.	Spectrum Management Department Consumers Affairs Department
Networks of the service providers	Network constitutes an improvement area for both mobile and fixed internet services with internet speed and quality of video access/streaming as the main aspects that CRA and the service providers need to focus on. Actions should be taken to raise the level of satisfaction of consumers residing in Umm Slal and Al Wakra for both mobile and fixed internet services. Vodafone Qatar P.Q.S.C customers are slightly less satisfied with the internet speed of the fixed	Spectrum Management Department Technical Affairs Department Consumers Affairs Department

	<p>internet services while Ooredoo Qatar P.Q.S.C customers are slightly less satisfied with the quality of video access/streaming of mobile internet services.</p> <p>Network retainability is also an improvement area for mobile internet services. Key stakeholders should focus their efforts into providing a better network retainability to residents of Al Wakra.</p>	
Pricing of telecom services	<p>Value perceptions of the pricing of telecom services are low to moderate overall. There is a need to review the prices offered in the telecom market to raise the consumers' satisfaction levels. The key market players should mostly focus their efforts on the aspects which received a low value perception score including international call charges (mobile and fixed voice), international roaming charges (mobile voice and internet), and data charges (mobile and fixed internet).</p> <p>Both service providers have low value perceptions on the pricing of international call charges, international roaming charges, and data charges. They both should focus on providing better services to mostly non-Qataris consumers and those aged between 25-34 years old.</p> <p>Other areas of improvement include the monthly rental charges (for all services), local call charges (mobile and fixed voice), and initial purchase and installation costs (fixed services). Vodafone Qatar P.Q.S.C records lower than average value perception scores for all three pricing aspects and therefore this service provider needs to develop an action plan on how to improve those aspects by targeting mostly non-Qataris.</p>	<p>Regulation Affairs and Competition Department Consumers Affairs Department</p>

<p>Tariff plans and fees of telecom services</p>	<p>Transparency of prices seem to be the biggest improvement area for mobile voice, mobile internet, and fixed internet services in Qatar. Vodafone Qatar P.Q.S.C records lower satisfaction scores across all three services, with the lowest score recorded for fixed internet. Another important factor to improve is the variety of rate plans offered for mobile services (both voice and internet). Consumers who are the least satisfied with this aspect of the services are mainly non-Qataris and younger consumers (below 35 years old). Both service providers need to be more transparent about the prices of the products/services they offer. Users of mobile internet services score moderate satisfaction levels for the ease of understanding the service terms and conditions and the ease of understanding the bundled packages. Better communication about the services through advertising and staff at the retail store would permit the consumer to understand the terms and conditions and the bundles packages in a better way. This mostly applies for the mobile internet service of Vodafone Qatar P.Q.S.C. Communications should target mainly residents of Al Wakra and non-Qataris.</p>	<p>Regulation Affairs and Competition Department Consumers Affairs Department</p>
<p>Recharge for pre-paid services</p>	<p>Accuracy of recharge, range of recharge, and validity of recharge are improvements areas for mobile services, both internet and voice. It is highly recommended to clarify the recharge terms and conditions and process for female consumers, non-Qataris residents, and those aged 15-24 years old.</p>	<p>Regulation Affairs and Competition Department Consumers Affairs Department</p>

	<p>Satisfaction with validity of recharge is also lower for customers of Ooredoo Qatar Q.P.S.C.</p> <p>There are also other areas for improvement for mobile internet services in terms of recharge which include the adequacy of recharge options and the ease of recharge. The least satisfied segments for these aspects are Qatari nationals and female consumers in general.</p>	
Complaint resolution	<p>There is a need to develop and implement actions to improve the complaint resolution process of the service providers with a focus on the indicators of responsiveness of the service provider in helping to resolve the complaint and the time taken to resolve the complaint.</p> <p>Actions should also be taken to implement a follow-up procedure for complaints to identify recurrent issues and work on solutions to fix them.</p>	Consumers Affairs Department
Customer services	<p>Improvement areas in terms of services provided by the customers services at the service providers call centers include the timeliness to respond to customer's call, listening to the customer's needs, and providing customers with helpful information.</p> <p>Improvement can also be made in terms of the waiting time at the retail store of the service provider to access the personnel.</p> <p>Key improvement actions should focus on the following segments: female consumers, non-Qatari consumers, age groups 15-24 and 25-34 years, and residents of Doha and Al Wakra.</p> <p>Overall, customers of Vodafone Qatar P.Q.S.C are less likely to be highly satisfied with the customer services and that is mostly due to a low satisfaction with the call center services.</p>	Consumers Affairs Department

Consumers' rights protection	<p>There is a moderate satisfaction with all factors related to telecommunication advertising: clarity of advertising and communication, ability to opt out of promotional messages from service providers, reduced spamming, and unwanted promotions. This suggests that the CRA should act with regards to regulations about communication and advertising of telecommunication services. CRA to take into consideration the facts that half of the consumers who believe there are misleading advertisements mention that the advertisement was describing the offer as free and that over a third of consumers indicate that the advertising falsely claimed that the offer would be available for an unlimited time or that the price was not displayed at all. Half of the consumers also indicate that the misleading advertising belongs to Ooredoo Qatar Q.P.S.C.</p>	Consumers Affairs Department
Number portability services	<p>Improvements can be made to raise awareness about the mobile and fixed number portability services and offering better quality. Further research may be needed to further understand the main reasons for customers' unsatisfaction.</p>	<p>Technical Affairs Department Public Relations and Communications Unit</p>

Appendix: Research details

Data Collection Instrument

Data was collected through a questionnaire of an average length of 30 minutes. The questionnaire was developed, translated, scripted and tested in English and Arabic prior to the fieldwork launch. Upon discussions between the CRA and Intelligence Qatar, the 2022 questionnaire used a 0 -10 rating scale to measure consumers' satisfaction instead of the 5-points scale that was used in the baseline of the 2018 studies. A 0-10 rating scale provides greater sensitivity in the results. With a 30-minutes survey and somewhat similar questions about satisfaction of telecom services, there was a need to make the satisfaction scale clearer to the respondents in terms of which point is negative/positive. Including '0' as an anchor point in the scale enables a better understanding of the scale and people are less confused. A 11-points scale also enables a better data diversity and a much broader spread of the results yielding better predictive analysis. Using a 5-points or 7-points scale won't allow for more advanced analysis such as the driver analysis. With a 0-10 scale, there is also a clear mid-point at '5'.

Data Collection Mode

Face-to-face interviews were conducted with eligible respondents using CAPI (Computer Assisted Personal Interviewing) methodology. The interview's average duration was 30 minutes. Fieldwork was conducted from August 2022 to September 2022. The interviews were conducted at public places such as parks, outside malls and parking lots. Participation in the survey was never an obligation and all people who have been approached by the field team were asked whether they agreed to participate in the study prior to starting the survey. People were also allowed to withdraw from completing the survey at any time. To conduct the face-to-face survey, the CRA provided a formal letter endorsing Intelligence Qatar to conduct the study on its behalf.

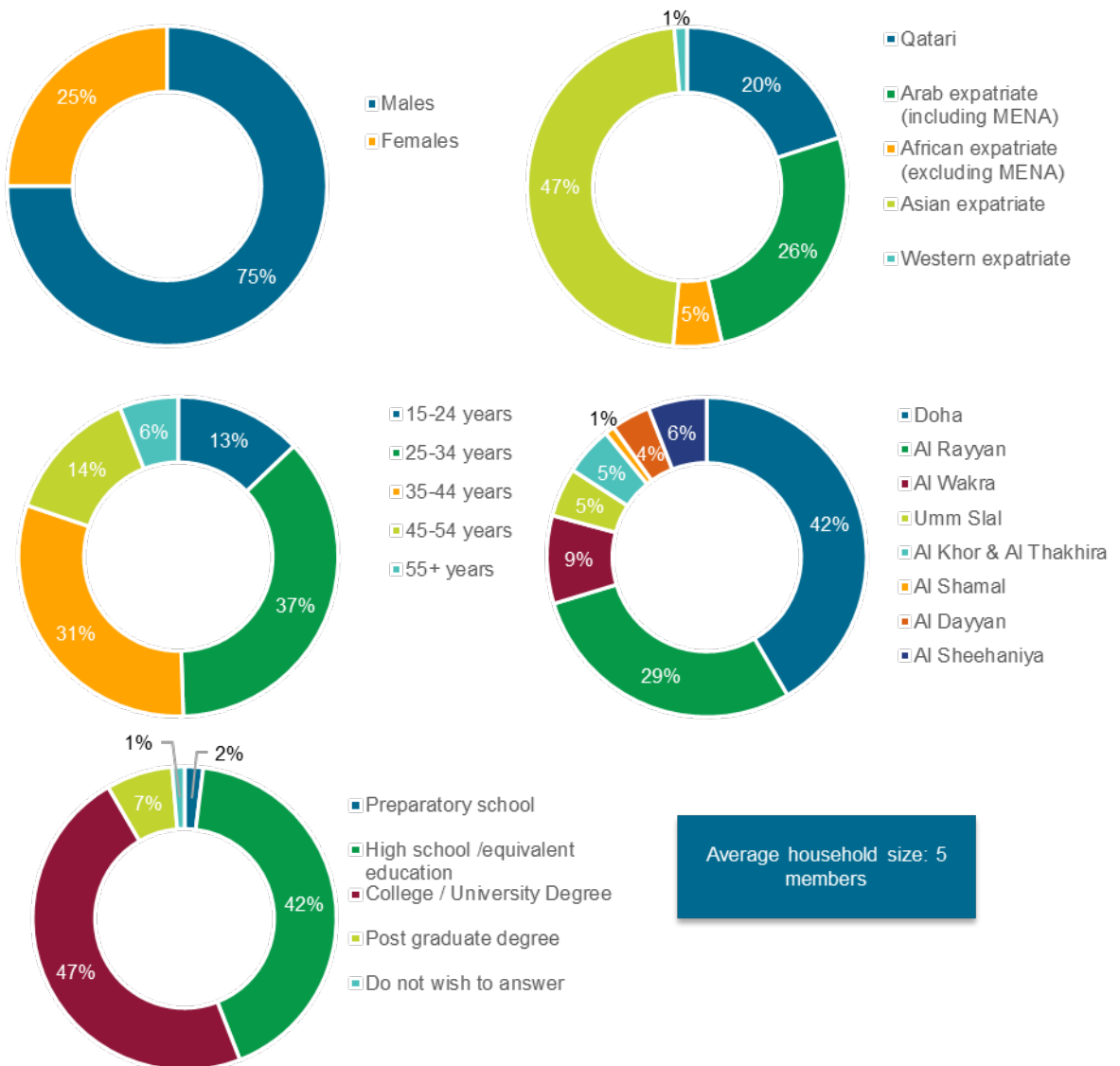
Sample Distribution

The Consumer Satisfaction Survey was conducted with a total sample size of n=2,529 consumers. Based on the latest available Census Data (2020), this sample size allows a margin of error of $\pm 2\%$ on a 95% confidence level which meets best practice standards of $\pm 5\%$. Quotas were applied during the data collection based on the 2020 Census data on the following demographic criteria:

- Gender: Male, Female
- Nationality: Qatar Nationals, Non-Qatari residents

- Age Group: 15-24, 25-34, 35-44, 45-54, 55+
- Municipality: Doha, Al Rayan, Al Wakra, Umm Slal, Al Khor & Al Thakhira, Al Daayen, Al Shamal, Al Sheehaniya

The figures below show the sample distribution for the consumer satisfaction survey.



Weighting Approach

The collected data was weighted to represent the population of Qatar. The surveyed sample was weighted considering the quotas criteria of gender, age, nationality, and municipality. The raking method was used to weight the achieved sample.

Abbreviations

CRA	Communications Regulatory Authority
GNI	Gross National Income
GDP	Gross Domestic Product
CAPI	Computer Assisted Personal Interview
ICT	Information and Communication Technology

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