ICT Market Study
Project

Communications and Information Technology Commission

Individuals Report

ICT Survey Results, 2014

Prepared by

Communications and Information Technology Commission

King Fahd University of Petroleum & Minerals

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هيئة الإتصالات وتقنية المعلومات
Communications and Information Technology Commission

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1.   Executive Summary

The main objective of this report is to describe and analyze the survey data collected for the current state of ICT market development in Saudi Arabia. The report provides both quantitative and qualitative analysis that will help CITC in identifying development and uptake of ICT services, use of technologies and their penetration, and satisfaction with service providers, in terms of service quality, pricing and complaints.

The report is an outcome of the study conducted in the Kingdom for the year 2014. The focus is primarily on the ICT services in the market, and investments, consumer behavior and use of technology, pattern of use of computers and Internet, level of satisfaction with various ICT services, and the barriers which prevent their usage. The principal outputs of the study include:

- ✓ Accurate and reliable data for year 2014, on the ICT services and market in the Kingdom from the users/consumers perspective

- ✓ Key recommendations and their expected impact on the development, diversification and growth of ICT markets

The outcome of the study will help to drive the strategic development of the Kingdom's ICT sector in order to strengthen the innovation and knowledge capital of ICT services, usage, features, and the level of satisfaction with the various services across all demographic and regional sectors of the Kingdom. The report will also support the development of market-driven regulations, policies and ICT initiatives. It provides insights into the adequacy of telecommunications services throughout the country; achievements of services, both in terms of quality and variety; promoting and enhancing the telecommunications sector and, improving and implementing a regulatory and policy framework.

In the present study, CITC and KFUPM have worked together to achieve the above mentioned objectives and goals.

The outcome of the study shows valuable market insights. It is observed that the usage of the three basic ICT services, namely Fixed Telephony, Mobile (Voice) and Internet, is uniform throughout the Kingdom.

Mobile service is the dominant mode for voice communication with nearly 89% of the respondents using the service. Furthermore, nearly 91% of these users use prepaid SIMs while nearly 46% use postpaid SIMs. The total subscription of Mobile (Voice) SIMs is found to be 140% among the users (i.e. 3736 SIMs are subscribed by 2,668 users). The average monthly expenditure on the primary Mobile (Voice) services by a user is estimated at SAR 244/-.

The level of satisfaction of users with respect to pricing of their primary Mobile (Voice) services is found to be below *Acceptable* (i.e., a score of 2.68 on a scale of 5). The quality of various Mobile (Voice) services is observed to be above *Acceptable* (i.e. a score of 3.47 on a scale of 5).

For Fixed Telephony, the average monthly spending is estimated at SAR 259/- per household. The level of satisfaction with Fixed Telephony services at home is *Good* (i.e. a score of 3.78 on a scale of 5).

Internet usage is found to be 91.27% based on the definition[1] (for age-group 12-65). It was also observed that nearly 80% of the Internet users spend 2 or more hours daily on the Internet. Nearly 88% of Internet users use Mobile Internet and half of these (51%) use Internet Data packages over their Voice/Data SIM while around 27% use dedicated Data SIMs.

The average monthly expenditure on Internet Data packages (on Data/Voice SIMs) is estimated to be SAR 209/- and on Dedicated Data SIMs is estimated to be SAR 154/- per user. The average perception of Mobile Internet pricing is found to be below *Acceptable* while the level of satisfaction with regards to services is above *Acceptable* (i.e. a score of 3.3 on a scale of 5).

For users that use Internet at Home, 61.5% access Internet only through 3G/4G technologies while 35.91% access Internet only through DSL/FTTH technologies. The average perception of Internet at home (using DSL, FTTH etc.) pricing is found to be near *Expensive* while the level of satisfaction with regards to services is above *Acceptable* (i.e. a score of 3.18 on a scale of 5).

Computer devices (desktops/laptops/tablets) usage is found to be nearly 77% for the age-range (12-65). Users preferred to use Laptops rather than Desktops. Smartphones usage is increased dramatically. Nearly 67% of users own Smartphones. The average annual spending on the smart phones is estimated to be SAR 1368/- per user as well as users tend to change their mobile handsets in every 1-2 years. The usage of e-Services is around 63% where the Government e-Services are the most widely used (nearly 34%), followed by e-Banking (32%) and e-Learning (27%).

The use of Online Social Networks is found to be nearly 91% among the respondents. YouTube, Facebook, Twitter and Instagram being the most widely used online social media with around 67% of the users spending 2 hours or more daily on Online Social Networks.

The analysis indicated that around 41% of all respondents have faced issues with their Service Providers but only 72% of those registered complaints to the service providers. Furthermore, around 62% of the complainants received the Complaint Reference Number. The overall level of

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[1] See Appendix B: For the Definition Used of Internet User and note that the target respondents are aged between 12 and 65 years.

satisfaction in handling complaint by Service Provider is below *Acceptable* (i.e. a score of 2.90 on a scale of 5).

Nearly 6% of all respondents complained to CITC. It is found that only about 22% of all respondents were aware of the fact that they can register complaint to CITC about the Service Providers if their problems were not resolved within 15 days of initial complaints. The overall level of satisfaction with respect to handling of complaints by CITC is *Acceptable* (i.e. a score of 3.02 on a scale of 5).

2. Background Information

CITC is responsible for regulating the ICT sector in the Kingdom. The Telecom Act, enacted in 2001, and its Bylaws, issued in 2002, provide the basis for the regulatory framework. The Act lists a number of objectives for CITC including: to provide advanced and adequate telecommunications services at affordable prices; to ensure creation of a favorable atmosphere to promote and encourage fair competition; to ensure effective usage of frequencies; to ensure transfer and migration of telecommunications technology to keep pace with its development; to ensure clarity and transparency of procedures; to ensure the principles of equality and non-discrimination; and to safeguard the public interest and the interests of users and investors.

The CITC Ordinance, issued in 2001, was amended in 2003 and defines the mandate, functions, governance, and administrative and financial independence of CITC. The Rules of Procedures detail the steps which operators and CITC must follow for timely resolution of issues that fall within the framework of the relationship among the various parties.

In fulfilling its objectives, the current agenda of CITC includes the enhancement of a fair and equitable competitive environment such that the ICT sector can be further liberalized. This encourages licensed service providers to roll out advanced network infrastructures including broadband, offer new services, provide network redundancy in case of malfunctions and emergencies, and ensure universal availability of ICT services throughout the Kingdom.

In order to monitor the ICT sector in the Kingdom and the performance of the licensees, CITC publishes quarterly reports on performance indicators for the ICT services markets. The indicators are calculated based on data provided by the licensed service providers. The indicators were prepared and published at the end of each quarter.

Expanding the scope of previous market research activities concluded in 2007-2009 and 2009-2011, CITC in 2013 initiated ICT Market Study to gauge the "pulse" of ICT as used by individuals as well as establishments (such as corporates, government and education sector) in

the Kingdom. The aim is to study the current status of ICT in the Kingdom, adoption and usage of IT and Telecom services, usage pattern of Internet and Online Social Networking, and needed regulatory reforms.

3.   Introduction

The analysis results and findings of the Individual/Household survey are presented in this document. The report is divided into various sections. The report briefly discusses the *deployment methodology* that was used for field survey. After that, *Sample Profile* for the respondents is presented. Following these sections, analysis results are reported for different ICT services. Different trends, based on demographics, are also presented in these sections.

4.   Deployment Methodology

A comprehensive deployment plan was prepared to start data collection for Individual/Household survey and to monitor its status on a daily basis until the usable data samples are collected to cover the required margin of error of 1.79 at confidence level of 95%. Based on sampling strategy, respondents from all over the Kingdom were surveyed. Following are the key highlights of the deployment phase:

- Interviews were done using Face-to-Face technique.
- For Individual/Household, over 3,000 usable samples were collected across the Kingdom using stratified sampling.
- Responses were collected using smart devices.
- Electronic survey with built-in advanced branch and skip logic was used to minimize errors during data collection.
- For analysis, only those responses which filled correctly were selected.
- Randomly selected respondents were called-back for Quality Check

The deployment plan comprised of many activities which includes preparation and testing of electronic surveys, recruitment and training of surveyors, preparing a plan of visits, and performing and monitoring of data collection.

The recruitment process of surveyors consisted of two stages. First stage included the collection of their resumes, and short listing them. Secondly, the short listed surveyors were interviewed in-person and selected accordingly. The field surveying team constituted of full-time and part-time male as well as female surveyors. The members of the part-time surveying team comprised of senior students from major universities all over the Kingdom.

The training of the male and female surveyors was organized through workshops and group-sessions, focusing on the following points: (1) Emphasizing/highlighting the purpose of conducting the surveys, (2) Creating awareness of the social and ethical responsibilities during data collection, and (3) Training the surveyors on the questionnaires so that they do not face difficulty while in the field.

A plan to visit all the 13 regions of the Kingdom was prepared by providing a visit schedule with the assignment of surveyors for Individuals/Households. A comprehensive dashboard was implemented for monitoring and to provide the current status of the samples collected at any point of time for all regions. A concentrated effort was exerted to maintain stringent monitoring of the quality of data collected during the survey.

5.   Respondent Profile and Demographics

By using Census of 2010G, a stratified sampling process was utilized for the identification of sample size per region. Stratified sampling involves grouping population on the basis of regions. After selecting the appropriate sample size for each region, respondents were selected within each region based on the following categories:

- Age (12-65 years)

- Gender

- Nationality

Census data for general population from 1431H (2010G) report, published by Central Department of Statistics & Information (CDSI), was considered for establishing a baseline for estimating the samples per region. This census data was chosen because it was the most recent and authentic publication from CDSI and provided information on demographic breakdown of populations in terms of administrative regions, nationality and gender. However, this census data lacked demographic data related to age up to the date of preparing this document. To overcome this shortcoming, population figures from the latest census were used, while retaining age distribution percentages from 1428H data for ages 12-65 years.

For the purposes of this study, random samples were collected from each region based on age, gender, and nationality criteria. Total of 3,000 samples were collected all over the Kingdom. For

the current study, and based on recommendations, a quota of 29% was achieved for the responses from households[2].
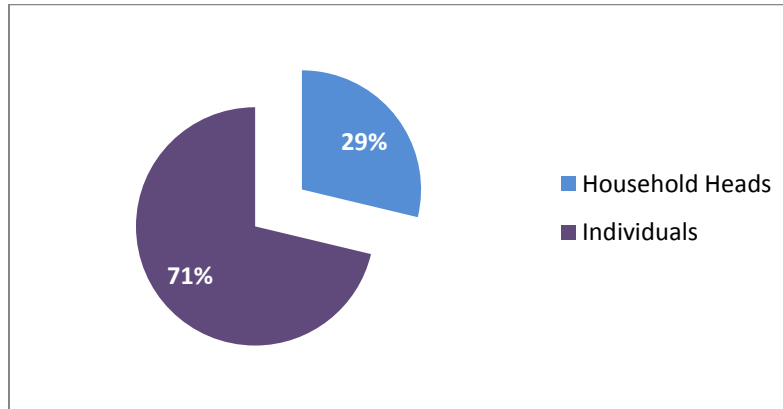
Figure 1:   Individuals and Households Ratio (% of all respondents: Total - 3000)

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[2] Household refers to Head of the house who is a chief earner as well as do decisions related to ICT Services and Technologies.

Table 1.   Sample Composition by Region (% of all respondents: Total - 3000)

Regions	% of Total Samples[3]
Al-Riyadh	26.38%
Makkah Al-Mokarramah	26.09%
Al-Madinah Al-Monawarah	5.97%
Al-Qaseem	3.35%
Eastern Region	16.57%
Aseer	5.87%
Tabouk	2.72%
Hayel	2.45%
Northern Borders	1.03%
Jazan	4.57%
Najran	1.66%
Al-Baha	1.79%
Al- Jouf	1.56%

Table 2.   Sample Composition by Nationality and Gender (% of all respondents: Total - 3000)

Gender / Nationality	Male	Female	Total
Saudi	33.34%	25.17%	61.22%
Expatriates	29.54%	11.95%	38.78%
Total	62.88%	37.12%	100%

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[3] After calculating the total number of population for each region from the National Census carried out in 2010G, based on Kingdom-wide population distribution, samples are selected for each region.
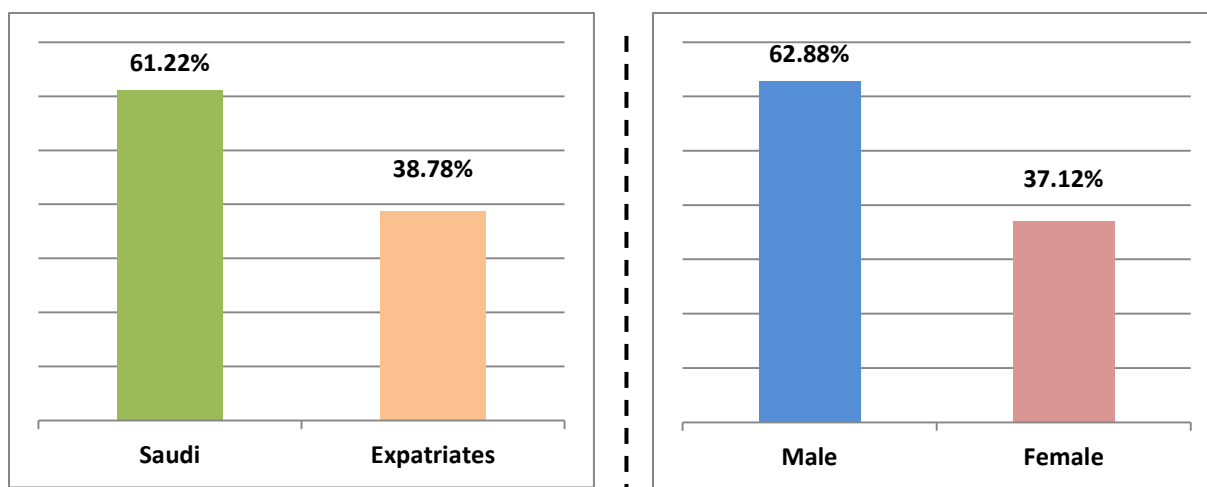
Figure 2: **Sample Composition by Nationality and Gender (% of all respondents: Total - 3000)**

Table 3. **Sample Composition by Age-Group (% of all respondents: Total - 3000)**

Age-Groups	% of Total Samples
12-19 years	15.61
20-29 years	34.74
30-39 years	27.51
40-49 years	14.35
50-65 years	7.79

6. Rating System

The satisfaction levels with respect to the different aspects of services were scored on a scale of 1 to 5 corresponding to the level of user satisfaction as shown in Table 4.

Table 4. **Satisfaction Rating Score Point.[4]**

Level of User Satisfaction		Score Points
Very Good	OR Very Satisfied	5
Good	OR Satisfied	4
Acceptable	OR Neutral	3
Poor	OR Unsatisfied	2
Very Poor	OR Very Unsatisfied	1

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[4] *In questions where 'I don't know' response was an available option, the average is calculated after excluding the ' I don't know' responses*

The satisfaction of the price levels with respect to the different aspects of offered services were scored on a scale of 1 to 5 corresponding to the level of user satisfaction as shown in the Table 5.

Table 5.   Price Rating Score Point[5]

Level of User Satisfaction	Score Points
Very Cheap	5
Cheap	4
Acceptable	3
Expensive	2
Very Expensive	1

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[5] *In questions where 'I don't know' response was an available option, the average is calculated after excluding the ' I don't know' responses*

7. General ICT Usage and Services

Figure 3 shows the percentage of all respondents who use various ICT services and technologies[6,7]. It is to be noted here that the target respondents were aged from 12 to 65 years old.

It is interesting to note that the usage of Mobile (Voice) is more than twice of Fixed Telephony.
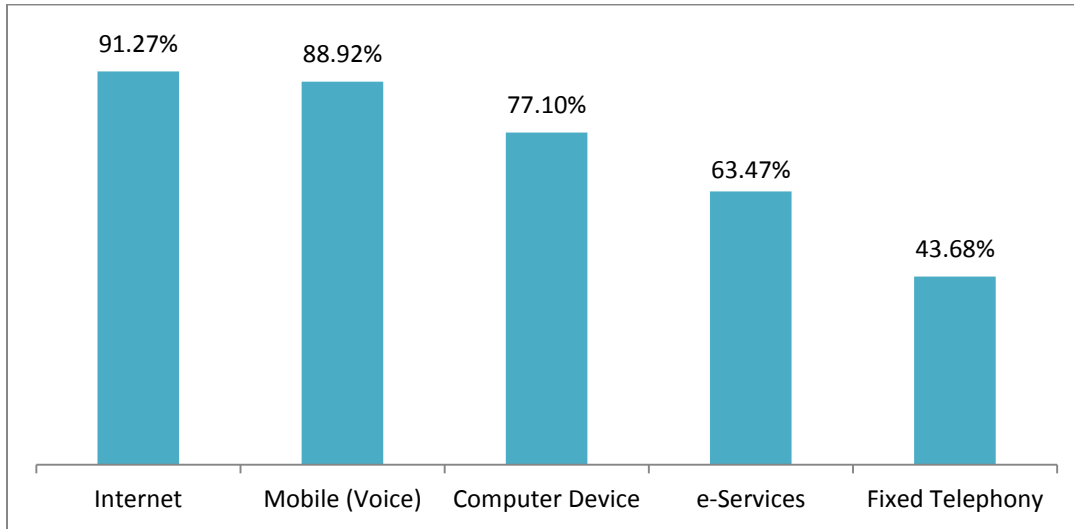
Figure 3: Users of ICT (% of all respondents: Total - 3000)

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[6] Please note that the Internet user is defined as a person who has used Internet at least once in the last six months.
[7] The results in this report are based on the data collected from 3000 respondents who were surveyed all over the Kingdom.

The usage of the main ICT services (Internet, Mobile (Voice) and Fixed Telephony) seems to be uniform across all the 13 regions of the Kingdom as shown in Figure 4. This indicates that the ICT services deployments are uniform throughout the Kingdom.
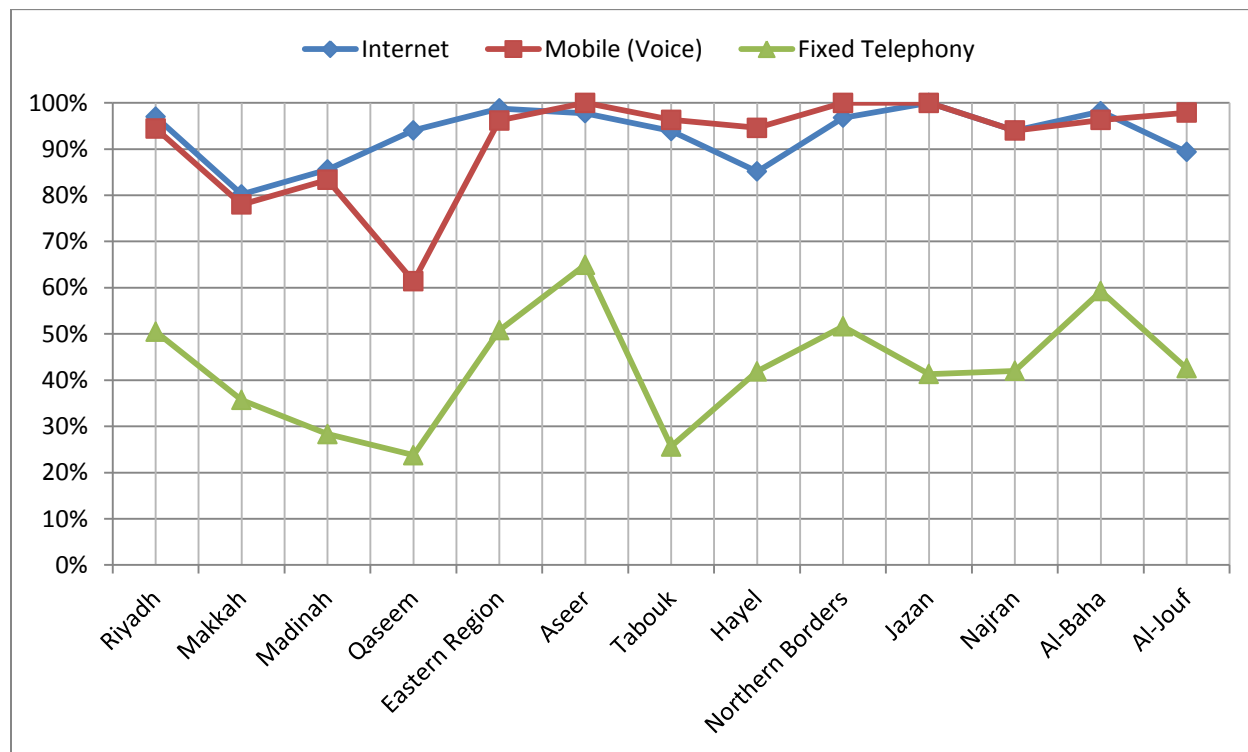
Figure 4:   Users of ICT Services: Region-wise (% of all respondents)

Figure 5 shows the trend of use of ICT among households when compared to Individuals. It is found out that the use of e-Services is higher among households.
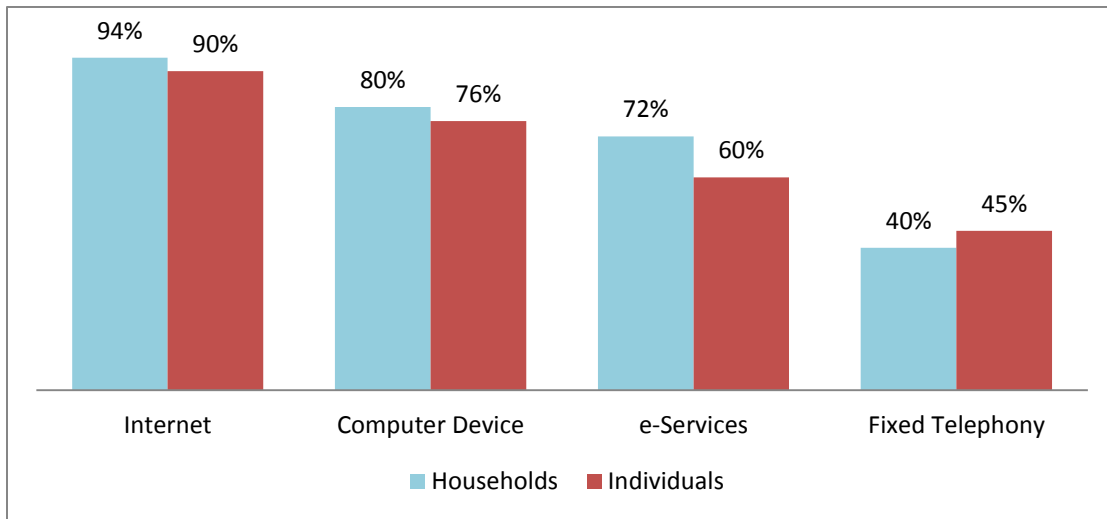
Figure 5: **Comparison of ICT Usage between Households and Individuals**

It is noted that the use of mobile and Internet services is nearly uniform for both males and females, and for both Saudis and Expatriates, as shown in Figure 6 and Figure 7 respectively. The same information is tabulated in Table 6.

Table 6. **ICT Services Usage: Nationality/Gender-wise (% of all respondents)**

	Male	**Female**	**Saudi**	**Expat**
Fixed Telephony	38%	54%	52%	31%
Mobile (Voice)	86%	94%	95%	81%
Internet	89%	96%	96%	85%

From Figure 6, it is clear that the usage of ICT is higher among Saudis as compared to Expatriates. Furthermore, it is interesting to note here that the usage of Fixed Telephony is significantly lower among Expatriates (31%) as compared to Saudi Nationals (52%); as well for Males (38%) as compared to Females (54%).
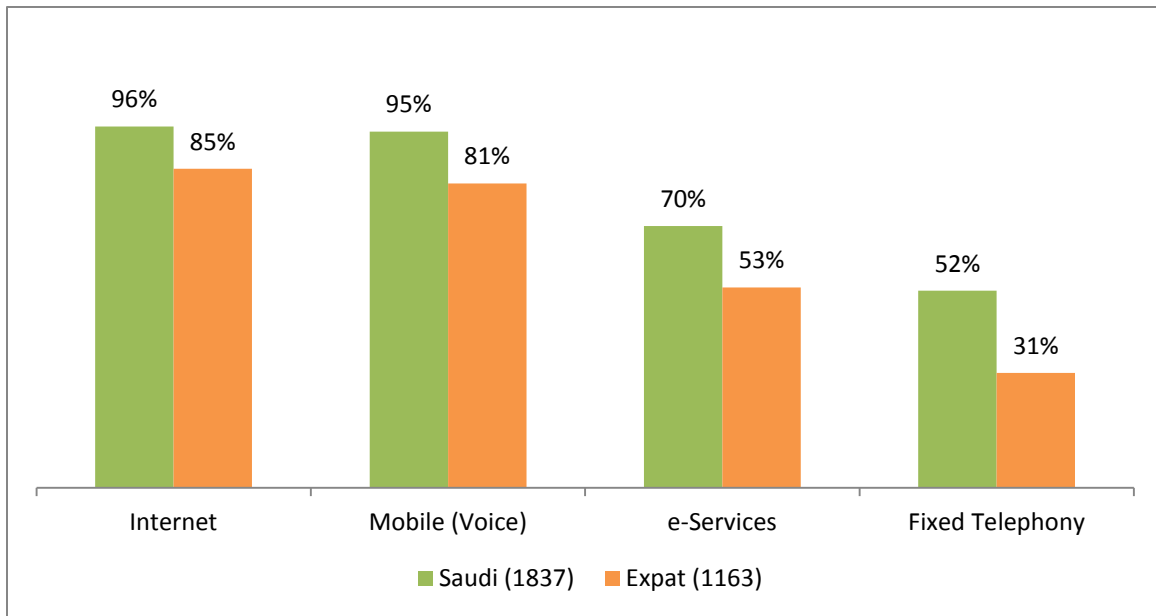
Figure 6: **ICT Usage: Nationality-wise (% of all respondents)**

From Figure 7, it is clear that the usage of ICT is higher among Females as compared to Males, except for the usage of e-Services. This is expected as more males are household heads and chief income earners for the family.
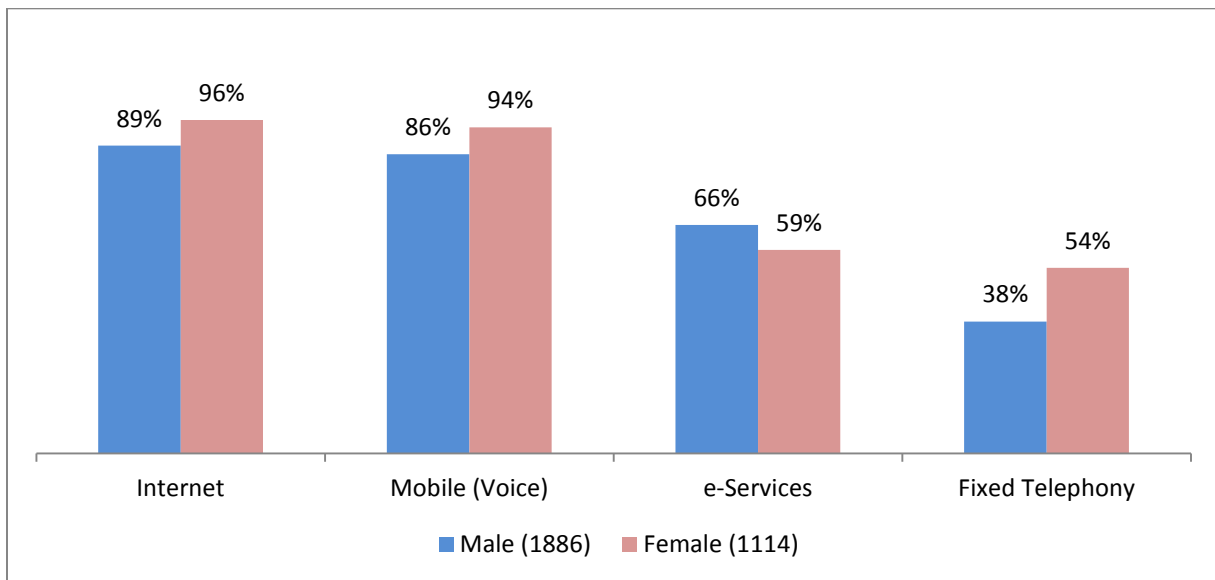
Figure 7: **ICT Usage: Gender-wise (% of all respondents)**

It is observed in Figure 8 that the highest usage of Internet and Computer Device is among respondents aged between 12 and 19 years; whereas the highest usage of Fixed Telephony is among the 50-65 years old.
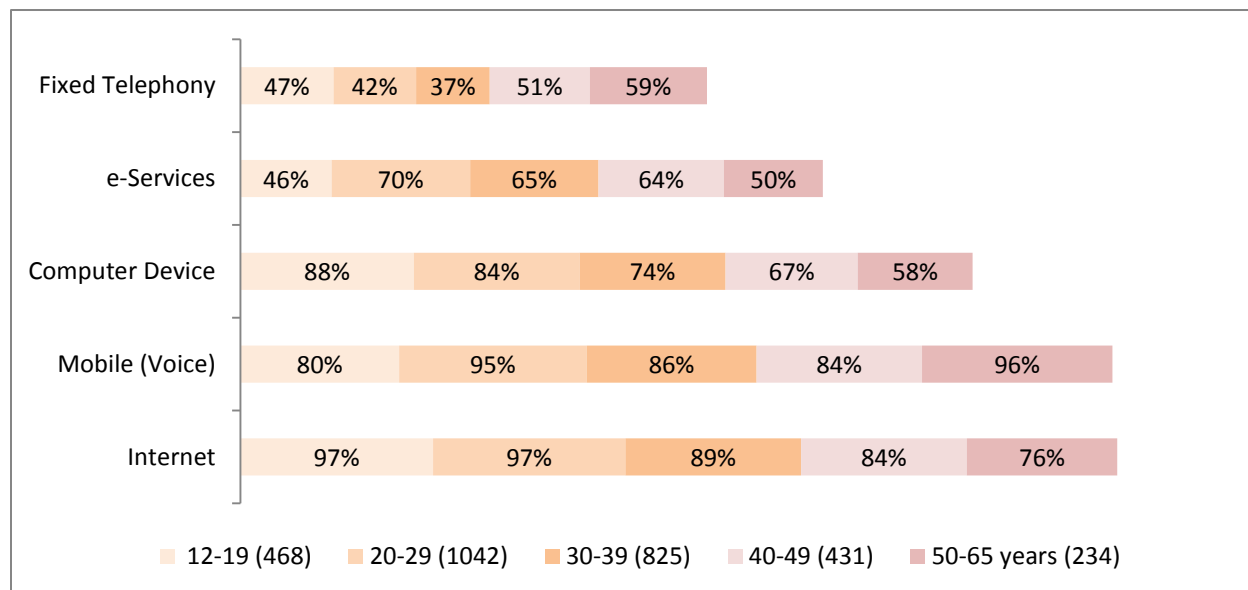
Figure 8:   Trend of ICT Usage: Age-Groups (% of all respondents)

8. Fixed and Mobile Voice Services

8.1 Fixed Telephony Services

8.1.1 Use of Fixed Telephony

Do you use fixed telephony service at home? (Single Choice)

From Figure 9, it is observed that 43.68% of all respondents *use* Fixed Telephony service at home.
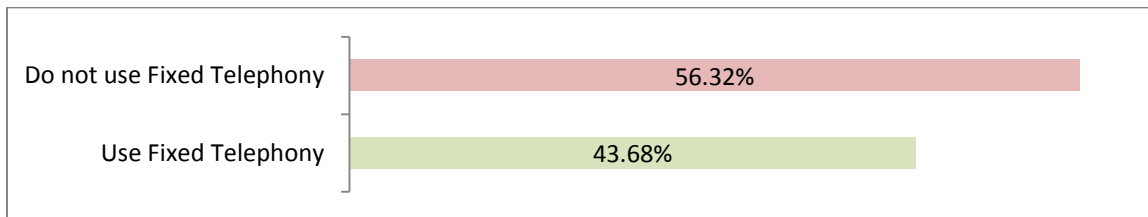
Figure 9:   Users of Fixed Telephony (% of all respondents)

It is also observed that out of all households[8], only 40.21% of households use Fixed Telephony service at home, as shown in Figure 10.
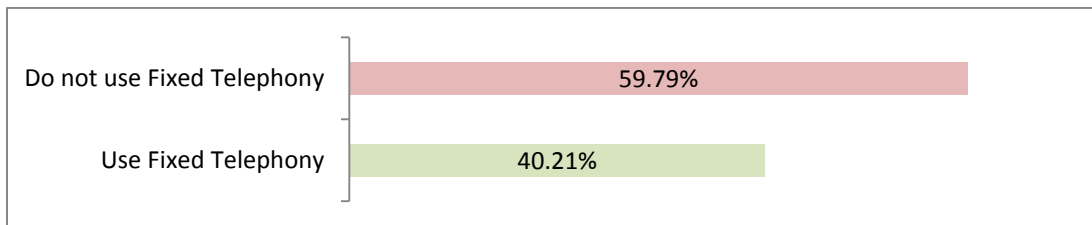
Figure 10:   Users of Fixed Telephony (% of Households: Total - 868)

8.1.2 Reasons for not using Fixed Telephony Services

What are your reasons for not using fixed telephony service? (Multiple Choice)

The majority of those who are not using Fixed Telephony service at home (71.65%) mentioned that they are using Mobile Voice as an alternate service. While only 9.59% of them stated that the service is not available in their residential area.

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[8] Household refers to Head of the house who is a chief earner as well as do decisions related to ICT Services and Technologies.
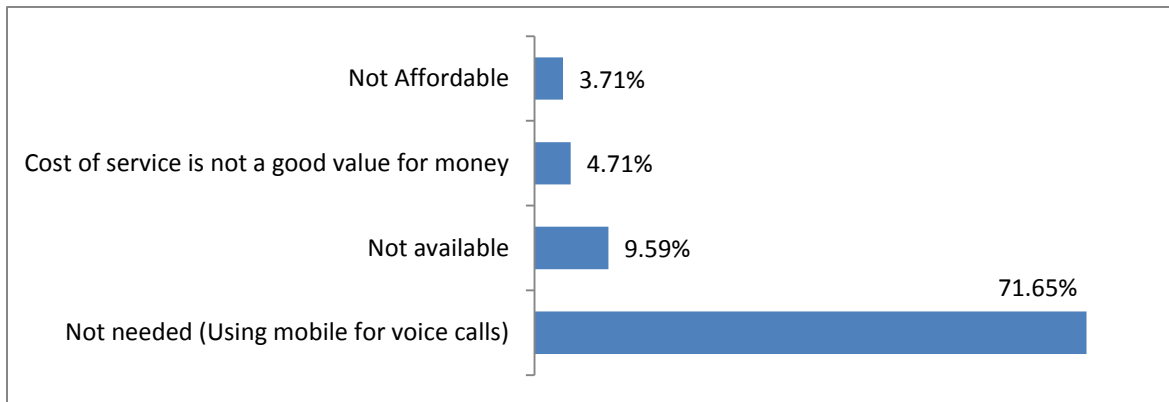
Figure 11: **Reasons for not using Fixed Telephony Services (Non-users of Fixed Telephony: Total - 1690)[9]**

8.1.3   Average Monthly Spending on Fixed Telephony

How much do you spend monthly, on an average, for your fixed telephone service? (Single Choice)

As evident from Figure 12, most of the household users are spending between SAR 51-400 per month on Fixed Telephony service. The average spending per household user on Fixed Telephony service is estimated at SAR 259/-[10] . In calculating this average the numbers of household users who use Fixed Telephony as a part of Bundled Services are not taken into account.

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[9] 17.18% of the non-users also answered 'Others' as reasons for not using fixed telephony service.
[10] 2.89% of the respondents who answered "I don't know" and 2.87% who use service as part of bundled service are not included in calculation of the average.
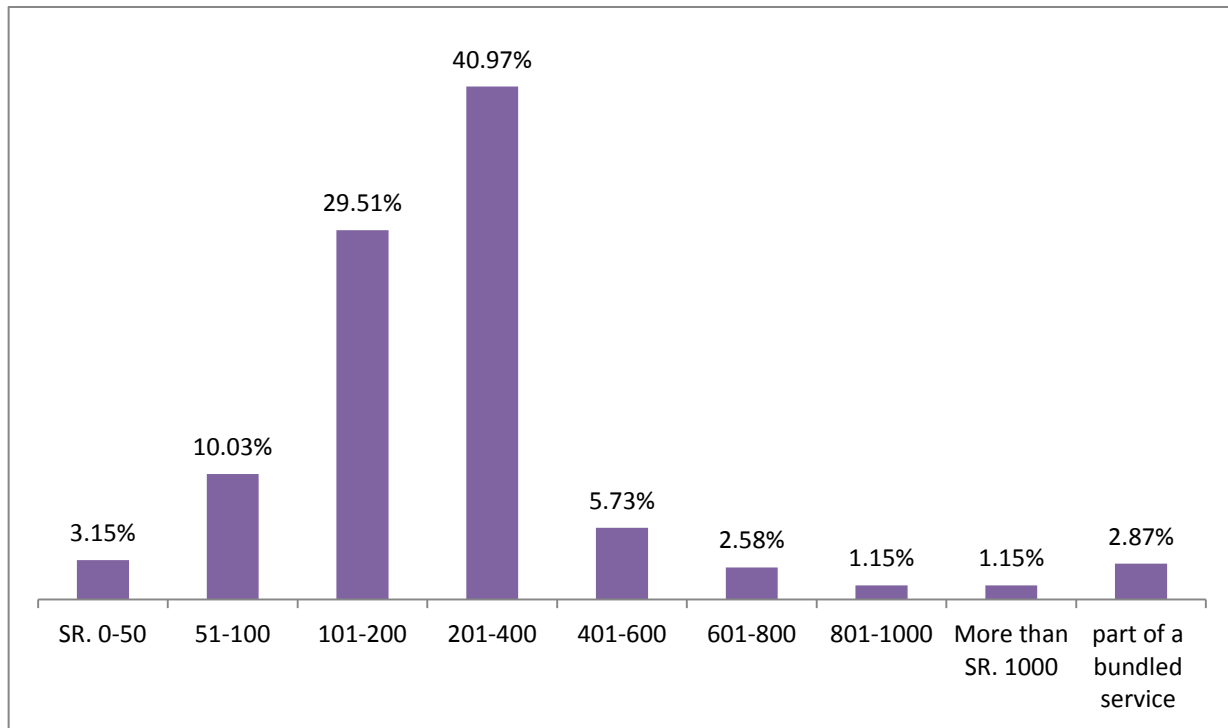
Figure 12: **Average Monthly Spending on Fixed Telephony Users (% of Households Users: Total - 347)[11]**

8.1.4   Satisfaction Rating for Fixed Telephony

Please rate your overall satisfaction with Fixed Telephony services. (Single Choice)

Figure 13 below depicts the percentage of users with various levels of satisfaction with regard to Fixed Telephony Services. Nearly 69% of the users are either 'Satisfied' or 'Very Satisfied' with the service while less than 6% of the users are 'Unsatisfied' or 'Very Unsatisfied'.

The average satisfaction score for Fixed Telephony Service is 3.78 (i.e., from Neutral to nearly Satisfied).

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[11] 2.89% of the respondents who answered "I don't know" not shown.
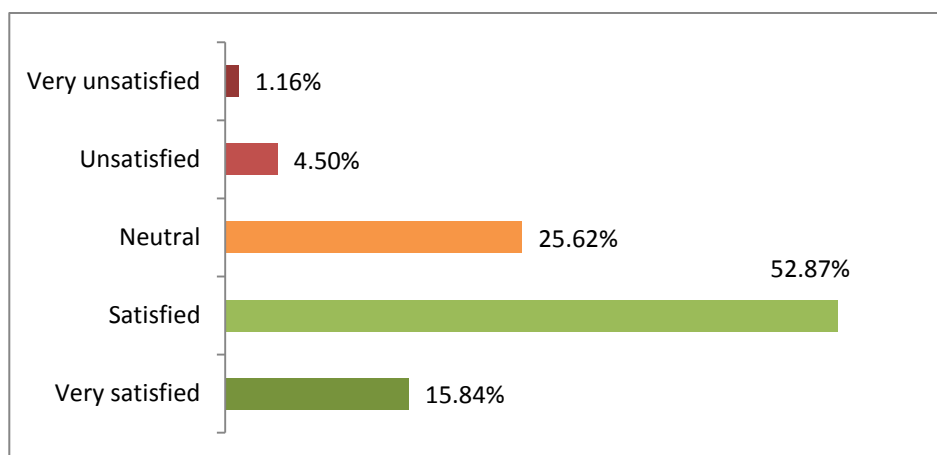
Figure 13: **Overall Satisfaction for Fixed Telephony Services (Total Respondents - 1288)**

8.2 Mobile Voice Services

8.2.1 Use of Mobile Voice

Do you use the mobile services (for voice and messaging)? (Single Choice)

The Figure 14 below depicts that 88.92% of all respondents use Mobile Voice (and messaging) Services.
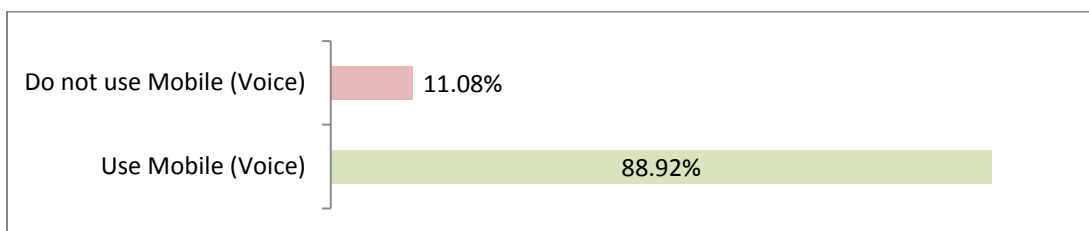
Figure 14: **Users of Mobile Voice (% of all respondents: Total - 3000)**

The Figure below shows the distribution of Mobile (Voice) non-users across the age-groups.
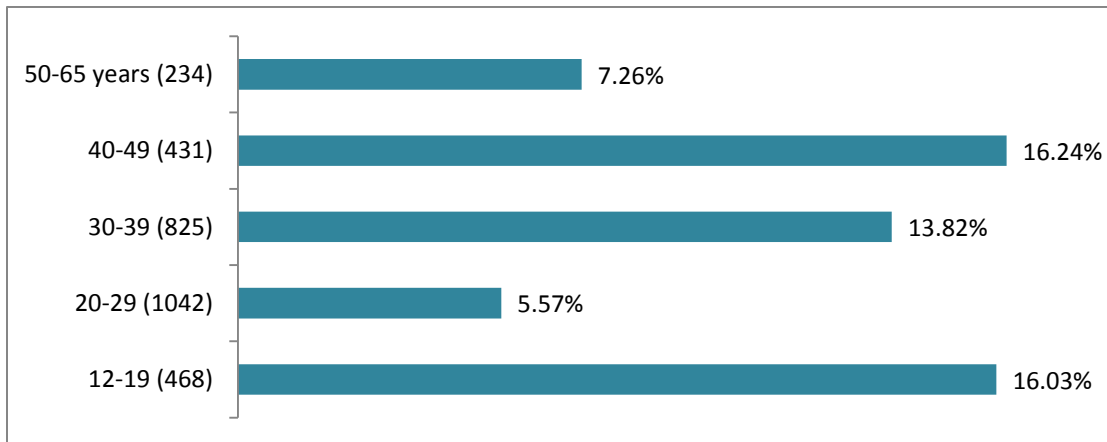
Figure 15:   Non-users of Mobile (Voice): Age-Groups (% of each Age-Group)

8.2.2   Reasons for not using Mobile Voice Services

What are your reasons for not using mobile services (for voice and messaging)? (Multiple Choice)

Among the non-users of Mobile (Voice) services, 16.37% mentioned that their family members do not allow them to use the service, while only 9.82% mentioned that they are not using the service because of privacy concerns.
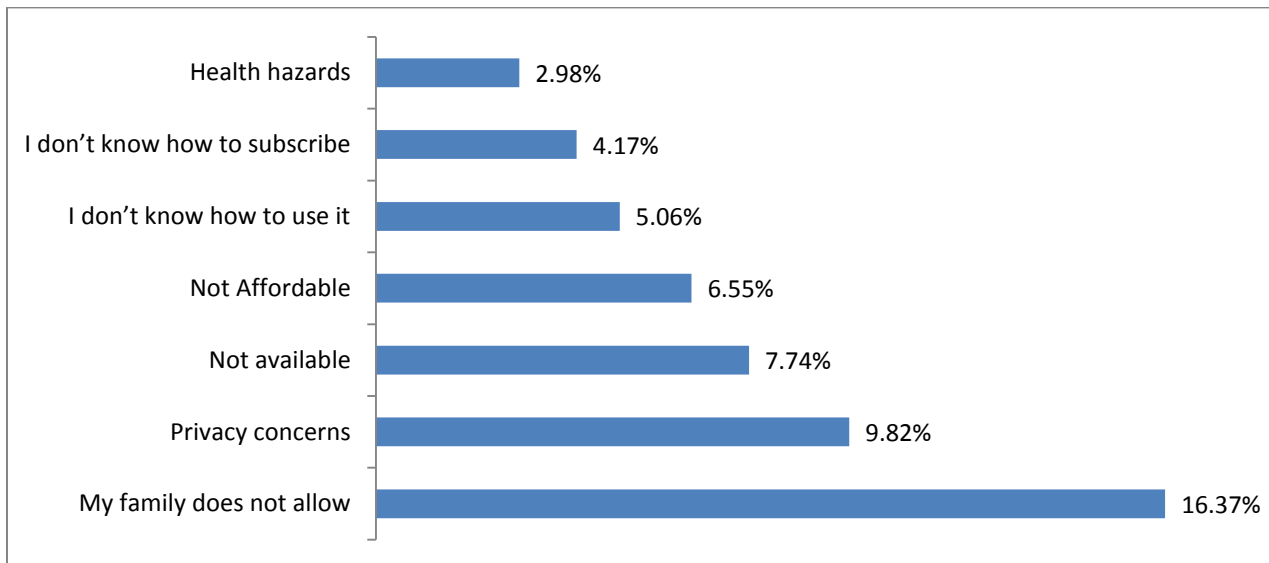
Figure 16:   Reasons for not using Mobile Voice Services (Non-users of Mobile (Voice): Total - 334)[12]

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[12] 61.31% of the respondents also answered 'Others' as reasons for not using Mobile (Voice) service.

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	My family does not allow	Privacy concerns	Not available	Not Affordable	I don't know how to use it	I don't know how to subscribe	Health hazards
12-19 (75)	53.33%	6.67%	8.00%	18.67%	4.00%	5.33%	1.33%
20-29 (58)	3.45%	3.45%	10.34%	6.90%	17.24%	8.62%	5.17%
30-39 (114)	5.26%	17.54%	6.14%	0.00%	2.63%	1.75%	1.75%
40-49 (70)	5.71%	7.14%	10.00%	5.71%	0.00%	2.86%	4.29%
50-65 years (17)	17.65%	5.88%	0.00%	0.00%	5.88%	5.88%	5.88%
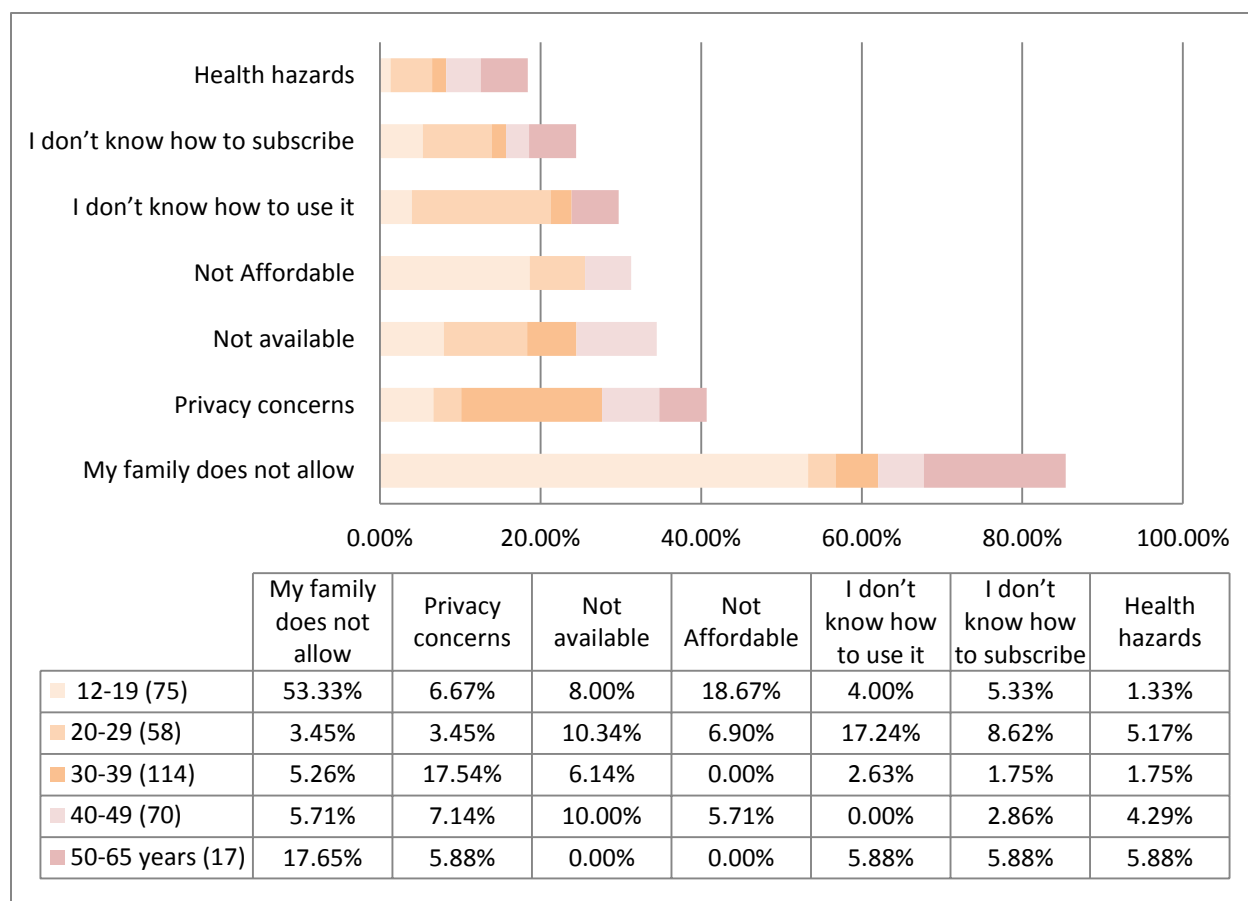
Figure 17:   Reasons for Not Using Mobile (Voice): Age-Groups (% of each Age-Group)

It is noted from above Figure that 53.33% of Mobile (Voice) non-users aged between 12-19 years mentioned that they do not use the service as the family does not allow them, and 18.67% said it is not affordable for them.

8.2.3   Subscription of Mobile Voice Services

How many mobile lines do you <u>subscribe</u> to (for voice) under your own name?

As indicated earlier in Figure 14, out of all respondents, 88.92% (2,668) are *using* Mobile Voice services and from among these users, 82.31% (2,196) users are having one or more Mobile (Voice) *subscriptions* under their own names.

The total *subscription of Mobile (Voice) SIMs* is found to be 140% among the users (i.e. 3736 SIMs are subscribed by 2,668 users) which means on an average each user has subscribed to 1.4 Mobile (Voice) SIMs).

It is noted that among the Mobile (Voice) users, the Prepaid subscribers are 92.20% while Postpaid users are 47.82%.
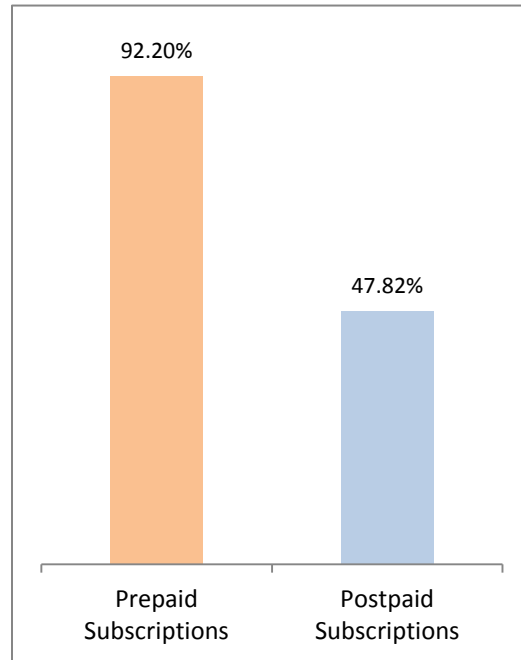
Figure 18:   Mobile (Voice) Subscription: Package-wise (Total – 2668 Users)

It is further noted that the more percentage of Saudis subscribe to Postpaid SIMs (42.95%) than Expats (15.99%); whereas more percentage of Expats (68.10%) subscribe to Prepaid SIMs than Saudis (62.71%), as shown in the Figure below.
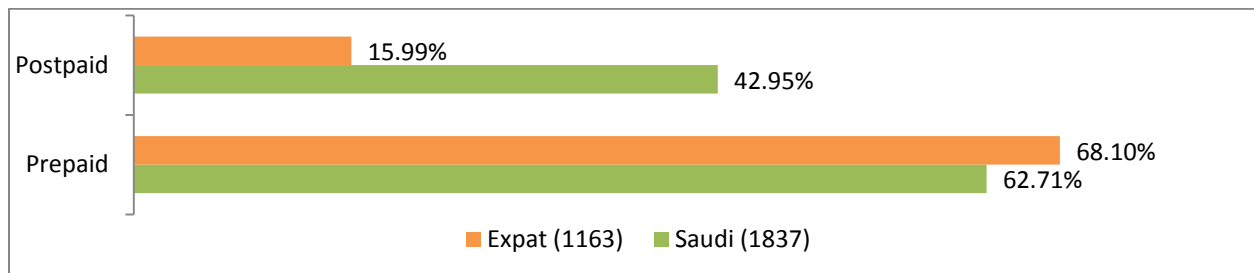
Figure 19:   Nationality-wise Percentage of Mobile (Voice) Subscribers

Why do you subscribe to more than one mobile line (for voice)? (Multiple Choice)

Nearly half of the users (50.13%) who subscribe for multiple Mobile (Voice) services, subscribed for their family members whereas nearly one-thirds (36.90%) subscribe different lines for business and personal uses.
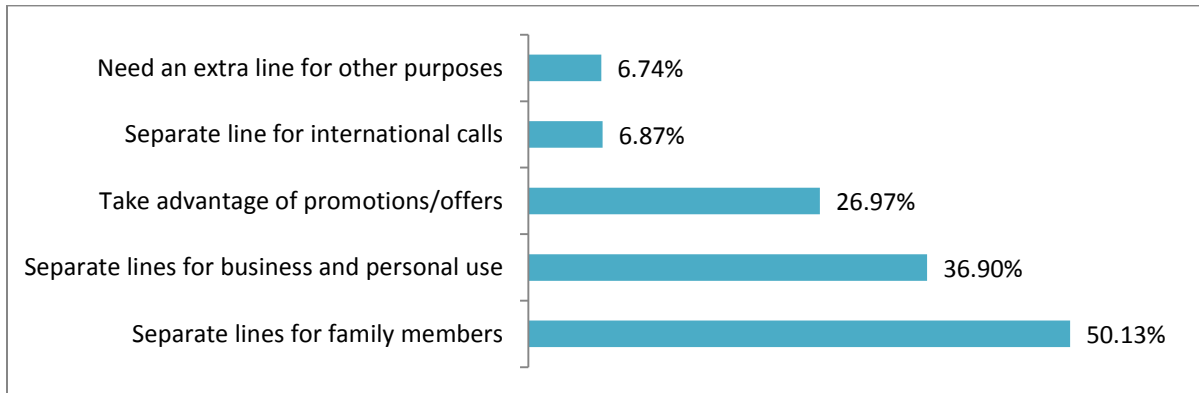
Figure 20: **Reasons for subscribing more than one Mobile Line (Voice) (Total Subscibers of Multiple Lines – 786)** [13]

8.2.4 Users of Mobile Voice Services

How many mobile lines do you use (for voice)? (Single Choice)

It is noted that 90.64% of Mobile (Voice) users use Prepaid SIMs while 45.62% use Postpaid SIMs.

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[13] 10.05% of the respondents who answered "Others" are not shown.
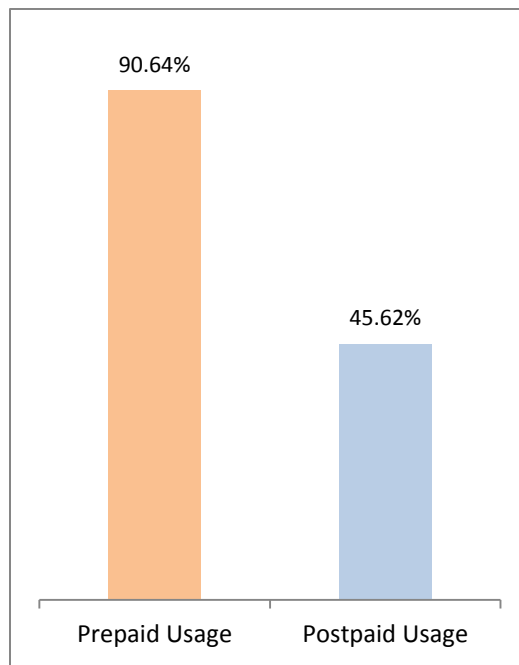
Figure 21:   Mobile (Voice) Usage: Package-wise (Total – 2668 Users)

It is further noted that the more percentage of Saudis use Postpaid SIMs (47.03%) than Expats (17.63%); whereas more percentage of Expats (76.96%) use Prepaid SIMs than Saudis (69.08%), as shown in the Figure below.
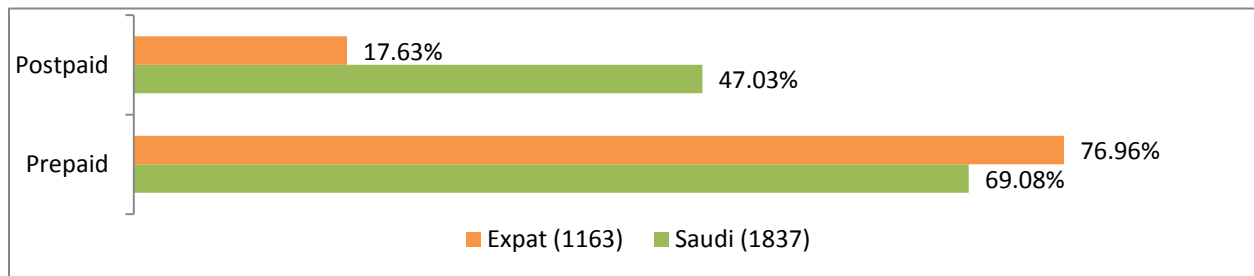
Figure 22:   Mobile (Voice) Usage: Nationality-wise Distribution of No. of SIMs in Use

Why do you use more than one mobile line (for voice)? (Multiple Choice)

Nearly half of the users (51.08%) use multiple Mobile (Voice) lines for business and personal uses while 42.44% use multiple lines to take advantage of promotions/offers.

Need an extra line for other purposes	8.95%
Separate line for international calls	10.96%
Take advantage of promotions/offers	42.44%
Separate lines for business and personal use	51.08%
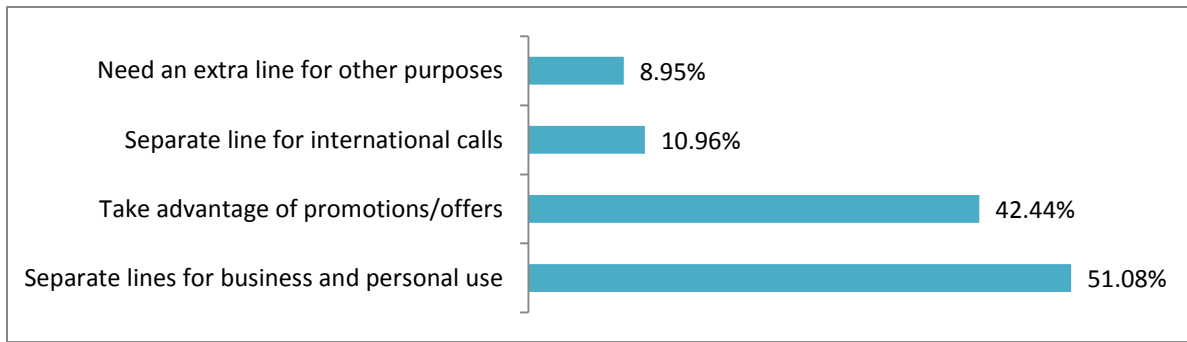
Figure 23:   Reasons for using more than one Mobile Line (Voice) (Total Users of Multiple Lines – 648)[14]

8.2.5   Average Monthly Spending on Mobile Voice Services for Primary Line

How much do you spend monthly, on an average, for your primary mobile services (for voice)? (Single Choice)

On average, most of the respondents (75.89%) spent between SAR. 51-400 per month for Mobile line (Voice and messaging) services. The average monthly spending on Mobile (Voice) services is estimated at SAR 244/-[15]. In calculating this average the numbers of users who use Mobile Voice as a part of Bundled Services are not taken into account.

---

[14] 18.21% of the respondents who answered "Others" are not shown.

[15] 1.27% of the respondents who answered "I don't know" and 0.55% who use service as part of bundled service are not included in calculation of the average.
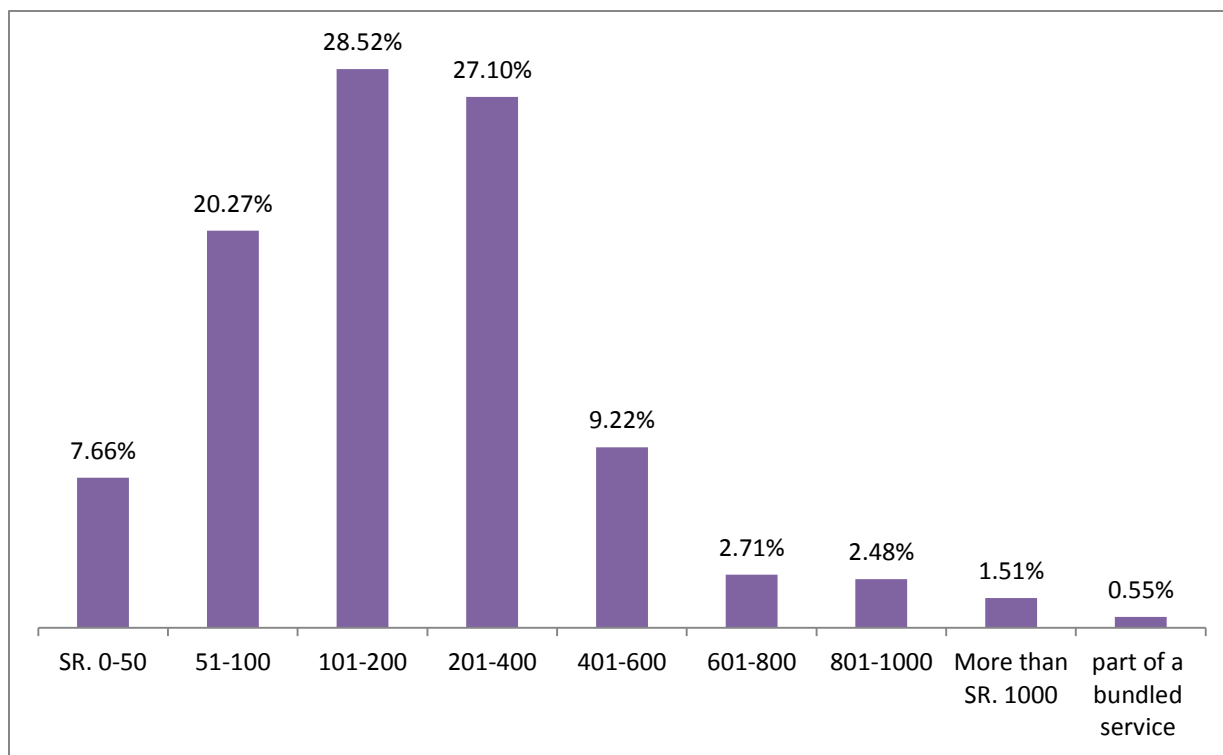
Figure 24:   Average Monthly Spending on Mobile Voice Services for Primary Line[16]

8.2.6   Price Rating for Mobile Voice Services for Primary Line

Please rate the price of the following mobile services (for your primary mobile service provider).

On average, respondents rated the prices of mobile service as below Acceptable (2.68). As depicted in Figure 25, on an average, Mobile calls to international destinations and roaming service received expensive price ratings.

---

[16] 1.27% of the respondents who answered "I don't know" are not included in calculation.
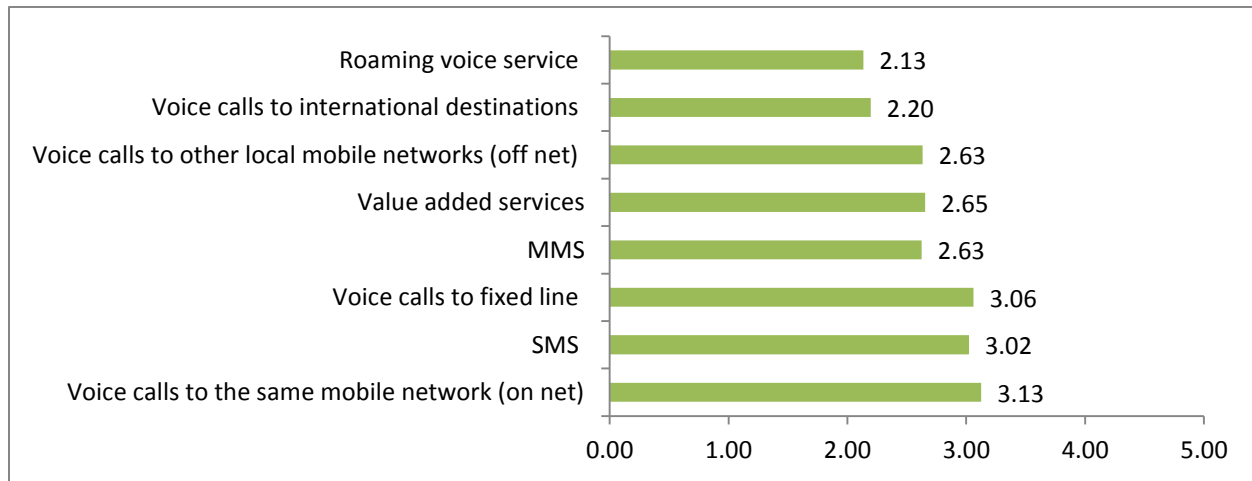
Figure 25: **Price Rating for Mobile Voice Services for Primary Line**[17]

8.2.7 Satisfaction Rating for Mobile Voice Services for Primary Line

Please rate your satisfaction with your primary mobile service provider for the following services.

The overall satisfaction rating for quality of Mobile (Voice) services is near to Good (3.47). It is evident that the level satisfaction of users with respect to cancelling of mobile services subscription and use of mobile number portability is below Acceptable. On the other hand, the level of satisfaction with respect to obtaining mobile services and voice quality of local calls is almost Good.

The average satisfaction levels scores for all Mobile Voice Users are shown in Figure 26.

---

[17] 24.65% of the respondents, answered "I don't know" for Roaming Voice Service, 28.45% for MMS and 44.46% for Value-Added Services, are not included in the calculation.
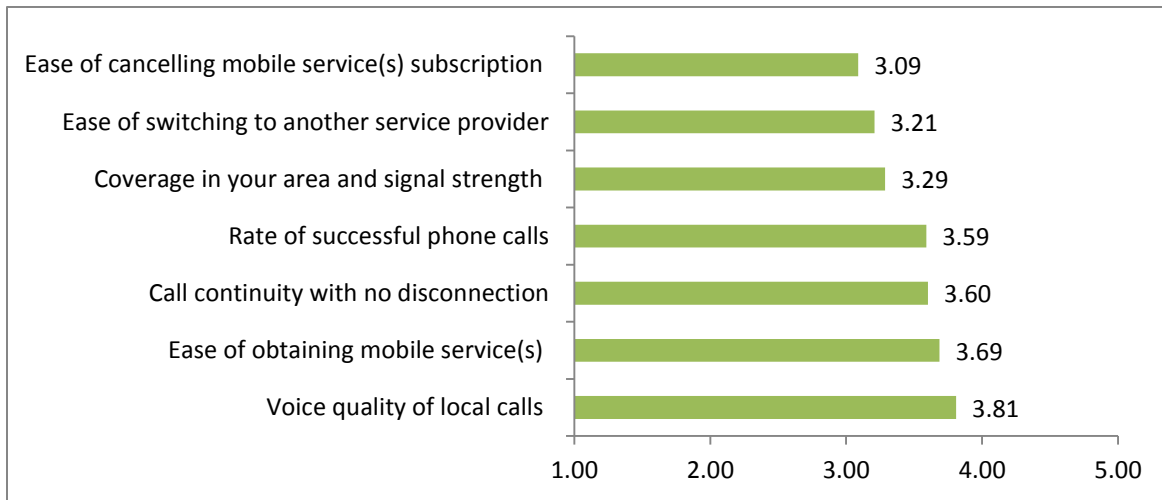
Figure 26:   Satisfaction Rating for Mobile (Voice) Services for Primary Line[18]

8.2.8   Considering Changing Mobile Service Provider (for Voice)

Would you consider switching your mobile service provider (for voice) to any other existing provider in the market during the next twelve (12) months? (Single Choice)

Only about 12.43% of the users are considering to switch their Mobile (Voice) service provider during the next 12 months, and nearly 70% of them want to switch, hoping for lower rates offered by other competing mobile service providers.
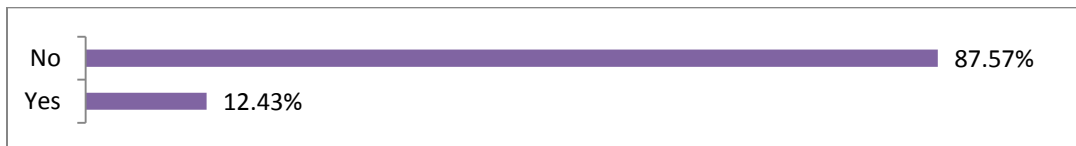
Figure 27:   Users Considering Changing Mobile Service Provider (Voice) (Total – 2668 Users)

Why would you consider changing your mobile service provider (for voice)? (Multiple Choice)

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[18] Respondents who answered "I don't know" are not included in calculation.

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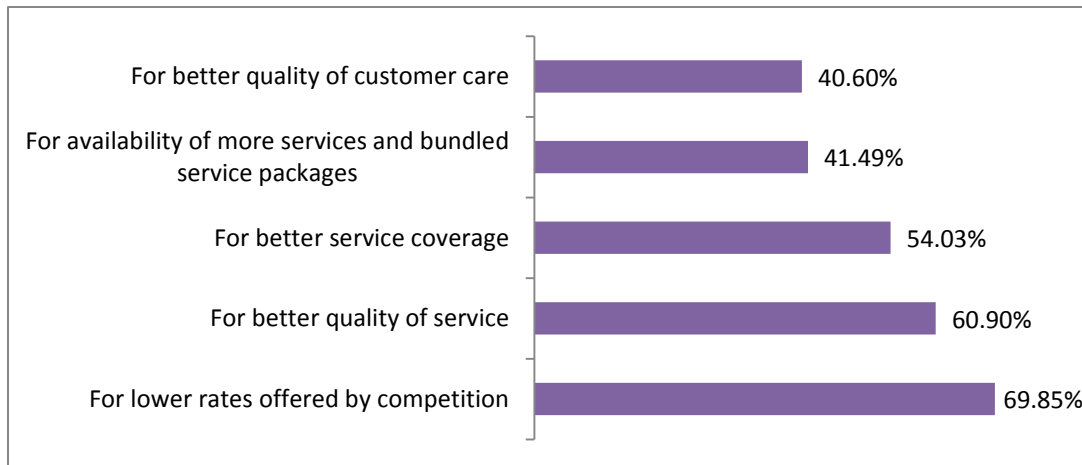
Figure 28: Reasons for Changing Mobile (Voice) Service Provider (Total – 331 Users considering changing Service Provider)[19]

8.3   Comparing Fixed Telephony and Mobile Voice Services

Now we look into the usage of ICT services for voice communications namely, Fixed Telephony and Mobile (Voice) services. Figure 29 shows that only 8.81% of the respondents do not use either of the voice services while 41.46% respondents use both services.

It is interesting that nearly half of the respondents (47.53%) use only Mobile services for voice communication.

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[19] 5.97% of respondents who also answered "Others" are not shown.
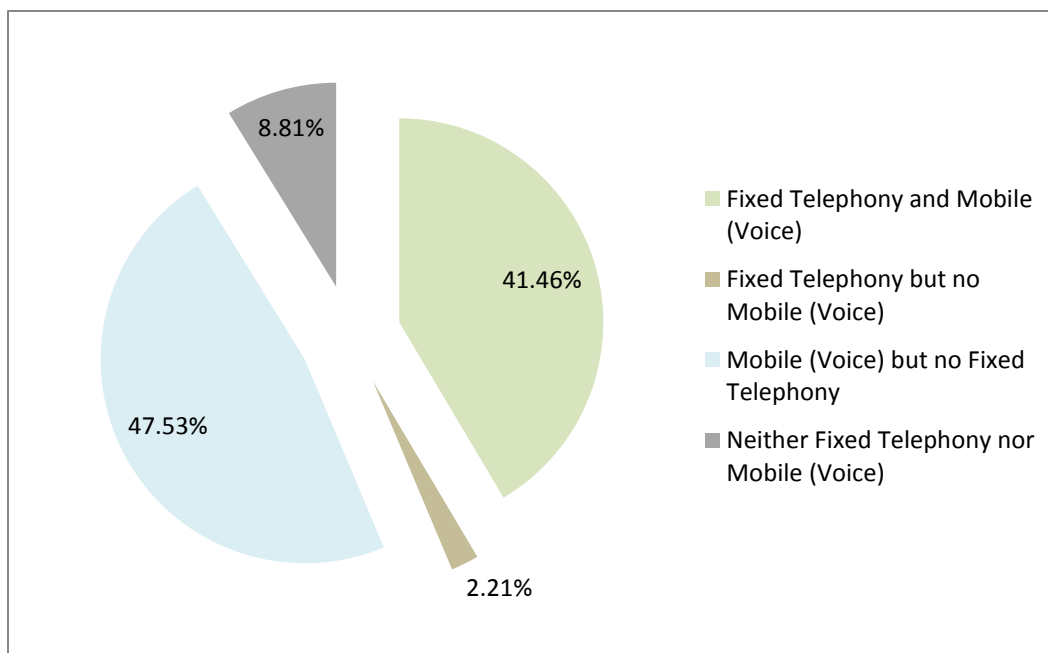
Figure 29: Fixed Telephony vs. Mobile Voice: Usage (% of all 3000 respondents)

Similarly the use of Voice services for Households is shown in the Figure 30. It is noted that more than half (57.51%) of households use only Mobile service for voice while 40.07% use both Fixed Telephony and Mobile services.

Comparison of the usage of both the services for households is shown in the Figure below.
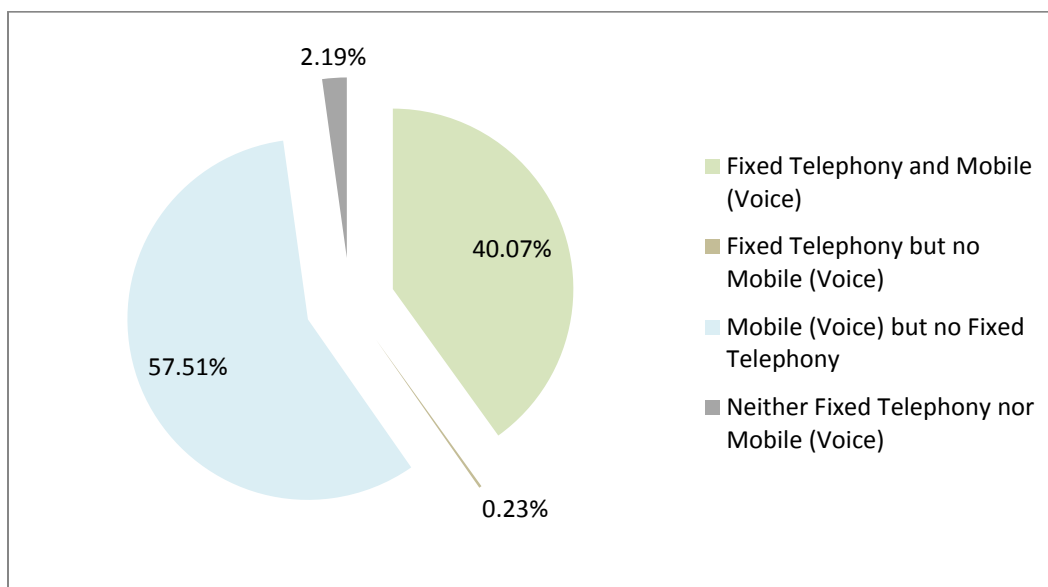
Figure 30: Fixed Telephony vs. Mobile Voice: Usage (% of all households)

The use of Fixed Telephony *at home* is compared with use of Mobile (Voice) service for the different employment types of the users in the Figure below.
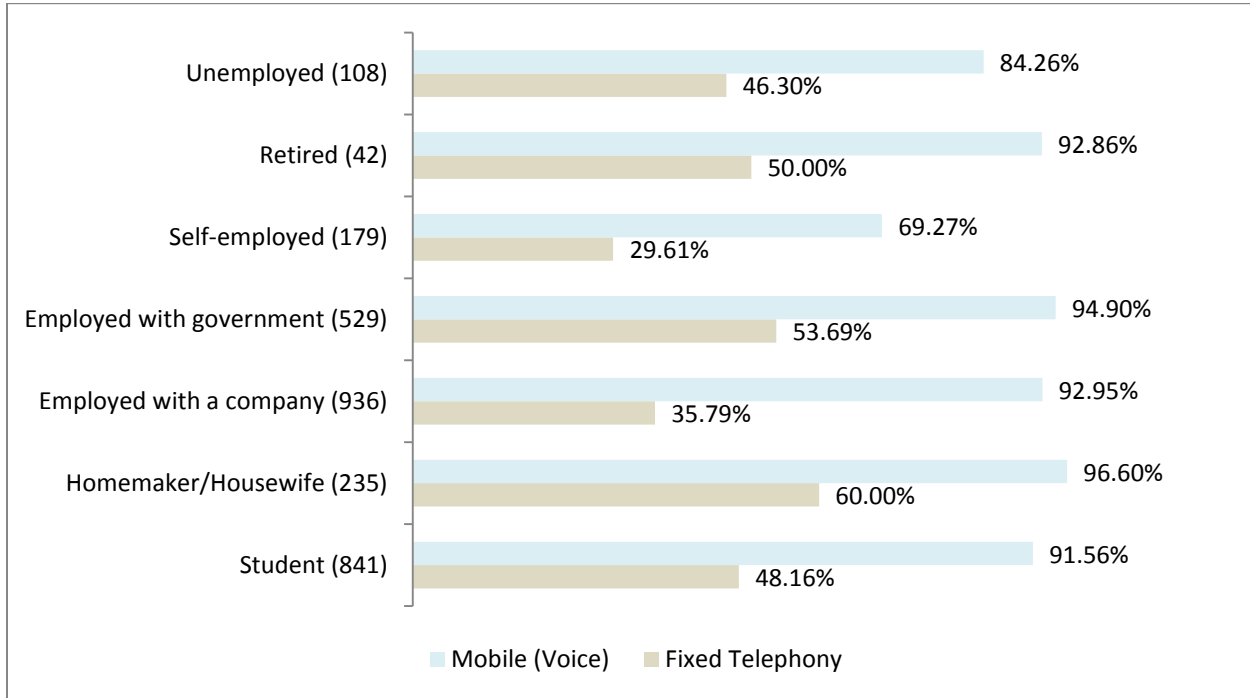
Figure 31:   Fixed Telephony vs. Mobile Voice Usage: Employment-wise

Figure 32 shows the histogram of the average monthly spending for percentage of household heads for Fixed Telephony and Mobile (Voice) services. It is interesting to note that the most of the Fixed Telephony as well as Mobile (Voice) users spend between SAR 51-400 per month.

The average monthly spending per household user for the Fixed Telephony service is SAR. 259/-[20], while Mobile (Voice) user, on average, spend SAR. 296/-[21] per month. In calculating this average the numbers of household users who use Fixed Telephony and the number of user who use Mobile (Voice) service, as part of Bundled Services are not taken into account.

---

[20] Respondents who answered "I don't know" and who use service as part of bundled service are not included in calculation of the average.
[21] Respondents who answered "I don't know" and who use service as part of bundled service are not included in calculation of the average.

	SR. 0-50	51-100	101-200	201-400	401-600	601-800	801-1000	More than SR. 1000	part of a bundled service
Series1	3.15%	10.03%	29.51%	40.97%	5.73%	2.58%	1.15%	1.15%	2.87%
Series2	4.30%	15.11%	27.64%	29.48%	11.30%	4.42%	3.93%	3.07%	0.49%
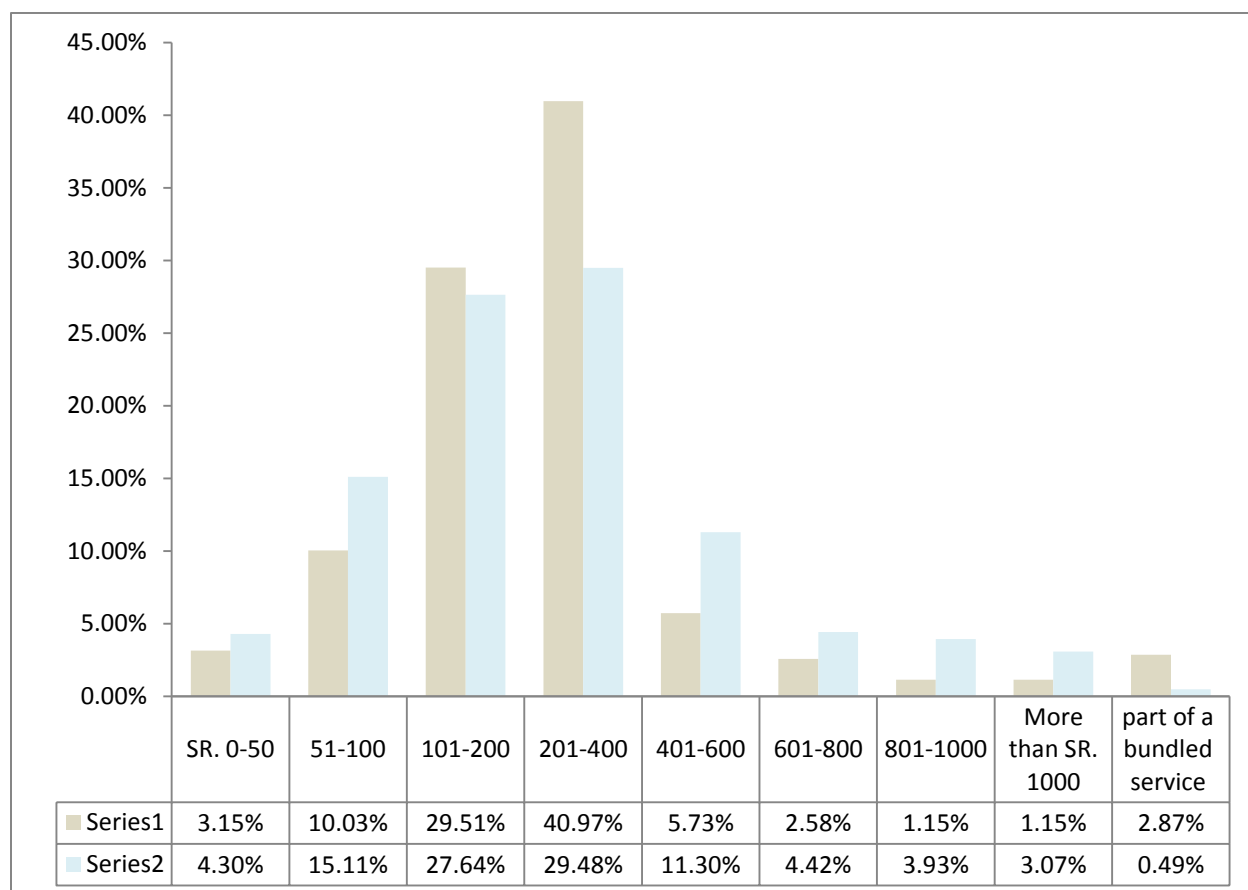
Figure 32: Average Monthly Spending on Voice Services by Households[22,23]

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[22] Spending on Fixed Telephony services is calculated using number of households using the service
[23] Spending on Mobile (Voice) services is calculated using number of households using the service

9. Internet Services

9.1 Internet Usage

9.1.1 Internet User vs. Non-Users

When was the last time you used the Internet? (Single Choice)

For the current study, Internet user is defined as a person who has used Internet at least once in the last six months. Table 7 shows the trend of Internet usage within the past couple of months.

Table 7.   When did the user last use the Internet?

Last Internet Use	% of all Respondents
Within the last month	89.34%
Within the last 3 months	1.13%
Within the last 6 months	0.80%
Within the last 12 months	0.70%
Not used Within the last 12 months	0.76%
Never used Internet	7.27%

Therefore, based on the definition, 91.27% of all the respondents (aged between 12-65 years) used Internet at least once in the last 6 months. Only 8.73% of the respondents are found to be non-users of Internet. It is to be noted here that the target respondents were aged between 12 and 65 years old.
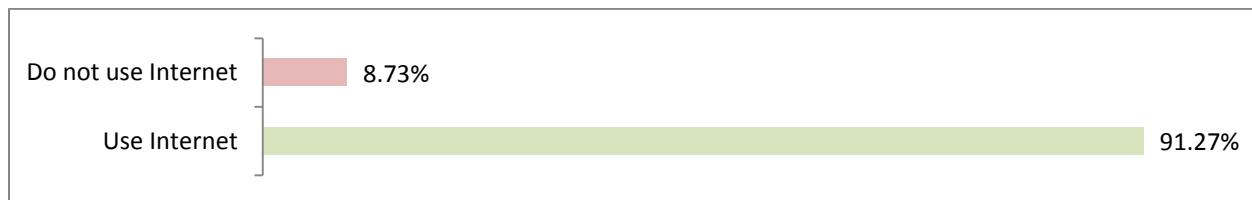
Figure 33:   Internet Users (% of all 3000 respondents)

Figure 34, Figure 35 and Figure 36 show the Internet Usage patterns for respondents from different marital status, employment types and income levels respectively.
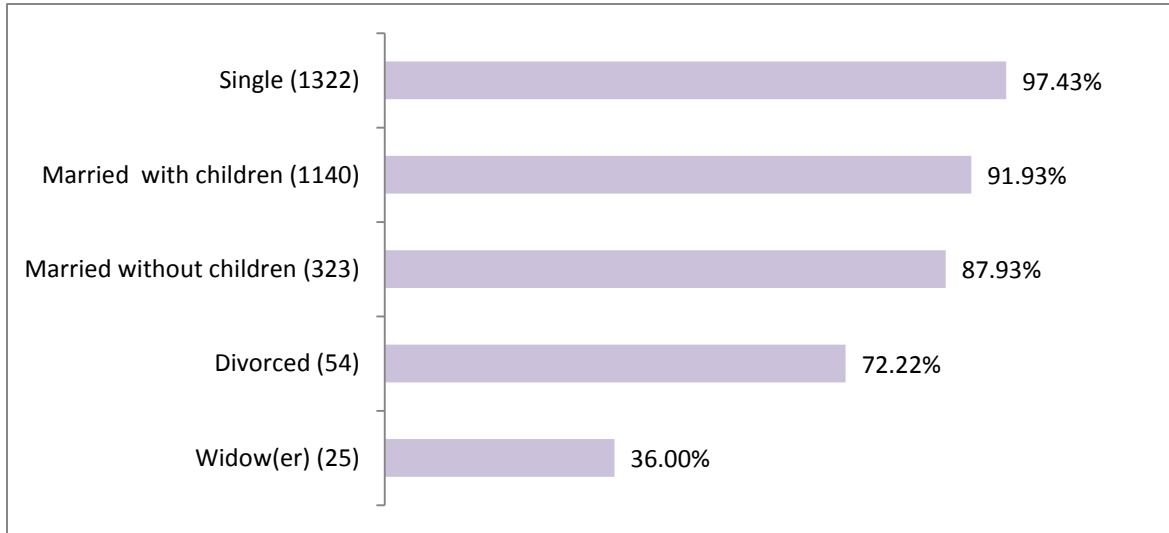
Figure 34:   Internet Users: Marital Status-wise[24]
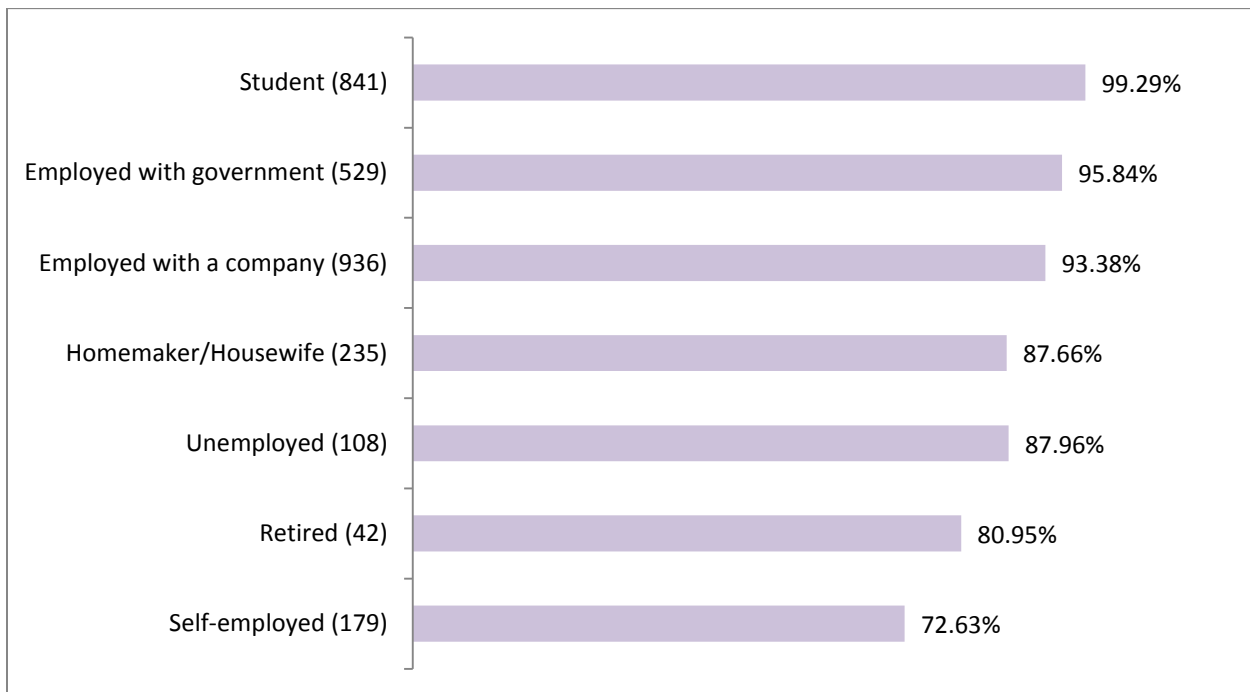
Figure 35:   Internet Users: Employment-wise[25]

[24] 62.75% of the respondents who answered "Prefer not to answer" (153) are also Internet users, not shown.
[25] 57.14% of respondents who answered "Other" (147) are also Internet users, not shown.

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University education: Master's degree (127) — 99.21%
University education: Bachelor's degree (1092) — 97.99%
University education: PhD (63) — 96.83%
Secondary school education (773) — 90.69%
Diploma certification (333) — 88.59%
Intermediate school education (387) — 86.82%
Elementary school education (156) — 82.05%
No formal education but can read and write (61) — 70.49%
No formal education and cannot read and write (25) — 16.00%

Figure 36:   Internet Users: Education-wise

9.1.2 Reasons for not using Internet in the last six (6) months
What are your reasons for not using the Internet in the last six (6) months? (Multiple Choice)

Those who did not use Internet in the past six (6) months, 19.55% of those having primary reason for not using it was lack of knowledge of using it.

Don't know how to use Internet — 19.55%
I don't know what Internet is — 13.53%
Not available — 8.65%
Not Affordable — 7.14%
Don't know how to get an Internet connection — 5.64%
My family does not allow — 2.63%
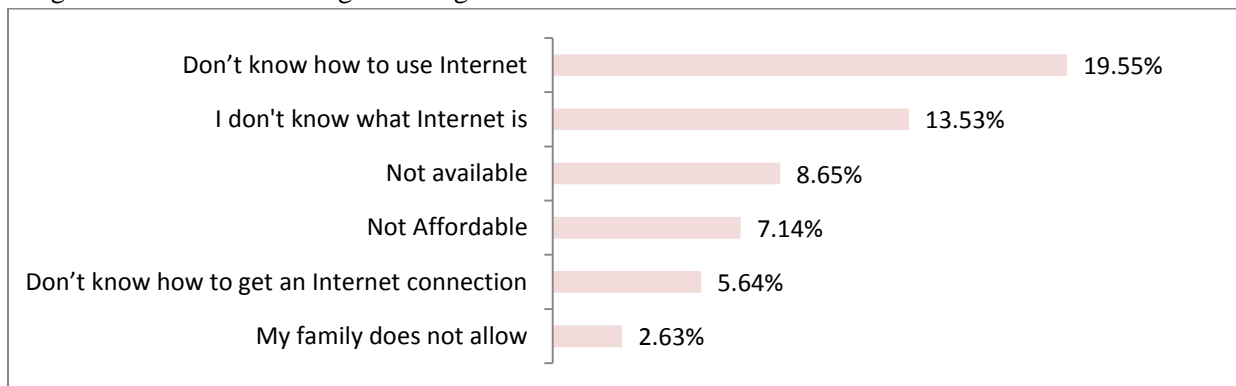
Figure 37:   Reasons for not using Internet in the last six (6) months (Total Non-Users - 261)[26]

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[26] 53.38% of the respondents who answered "Others" not shown.

Are you planning to use the Internet within the next six (6) months? (Single Choice)

Among these non-users, only 12.78% of the respondents are planning to use Internet within the next 6 months.

No   87.22%
Yes   12.78%
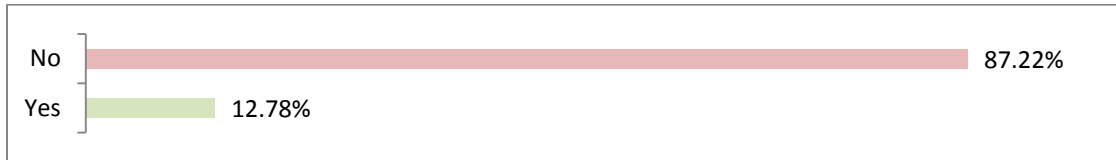
Figure 38: **Planning to use Internet in the next six (6) months (Total Non-Users – 261)**

9.59%	27.66%	17.07%	10.87%
Male (216)	Female (45)	Saudi (80)	Expat (181)
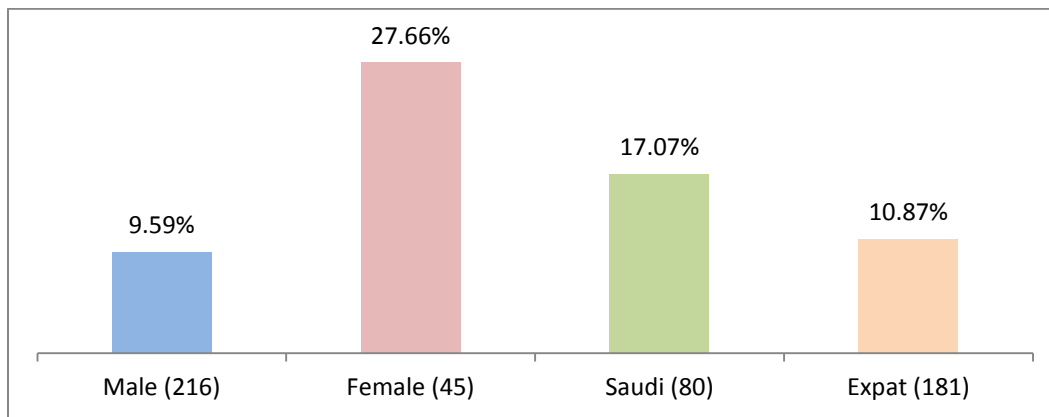
Figure 39: **Non-Users Planning to use Internet in the next six (6) months: Nationality/Gender wise (Percentage of Non-Users)**

37.50%	20.59%	12.22%	9.86%	5.45%
12-19 (16)	20-29 (33)	30-39 (88)	40-49 (69)	50-65 years (55)
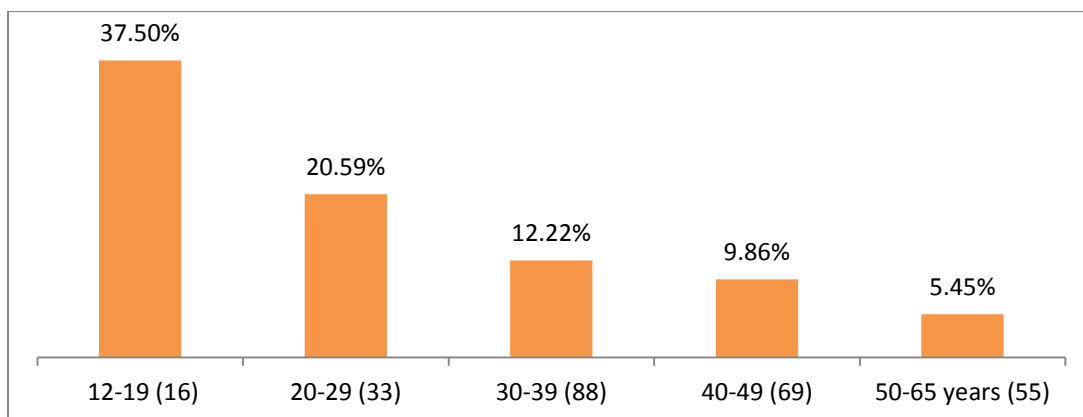
Figure 40: **Non-Users Planning to use Internet in the next six (6) months: Age-wise (Percentage of Non-Users)**

9.1.3 Place of Internet usage

Where do you usually use the Internet? (Multiple Choice)

The most common place to use Internet among the respondents is at home (76.27%), followed by Workplace (65.07%) as shown in Figure 41. Furthermore, Figure 42 and Figure 43 show the results of respondents who use Internet at different places with reference to their gender and age-group.
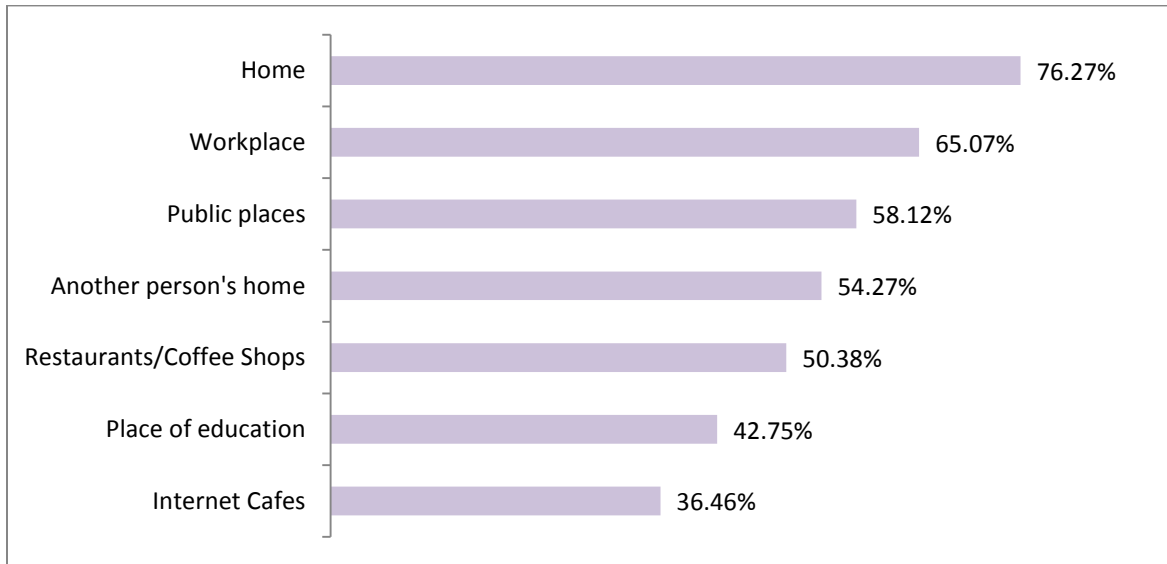
Figure 41:   Place of using Internet (Total Internet Users – 2739)[27]

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[27] 2.36% of the respondents who answered "Others" not shown.
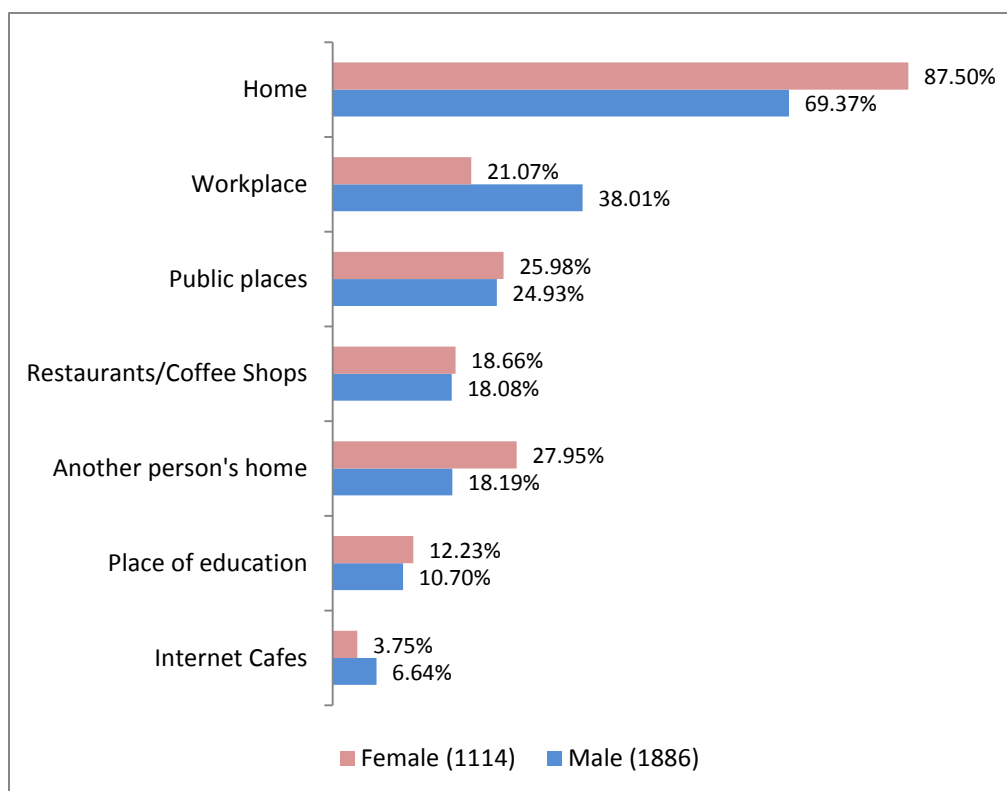
Figure 42:   Place of using Internet: Gender-wise[28]

---

[28] 2.48% males and 1.61% of females who answered "Others" not shown.

	Workplace	Place of education	Another person's home	Public places	Restaurants/Coffee Shops	Internet Cafes	Home
■ 50-65 years (234)	47.01%	17.09%	28.63%	33.33%	21.79%	14.10%	64.68%
■ 40-49 (431)	57.31%	24.13%	34.57%	39.68%	33.18%	21.58%	64.67%
■ 30-39 (825)	69.94%	31.03%	44.73%	48.97%	44.00%	30.79%	70.00%
■ 20-29 (1042)	69.87%	55.37%	62.76%	67.47%	61.13%	46.35%	83.40%
□ 12-19 (468)	29.49%	44.23%	56.20%	53.63%	42.95%	31.62%	87.47%
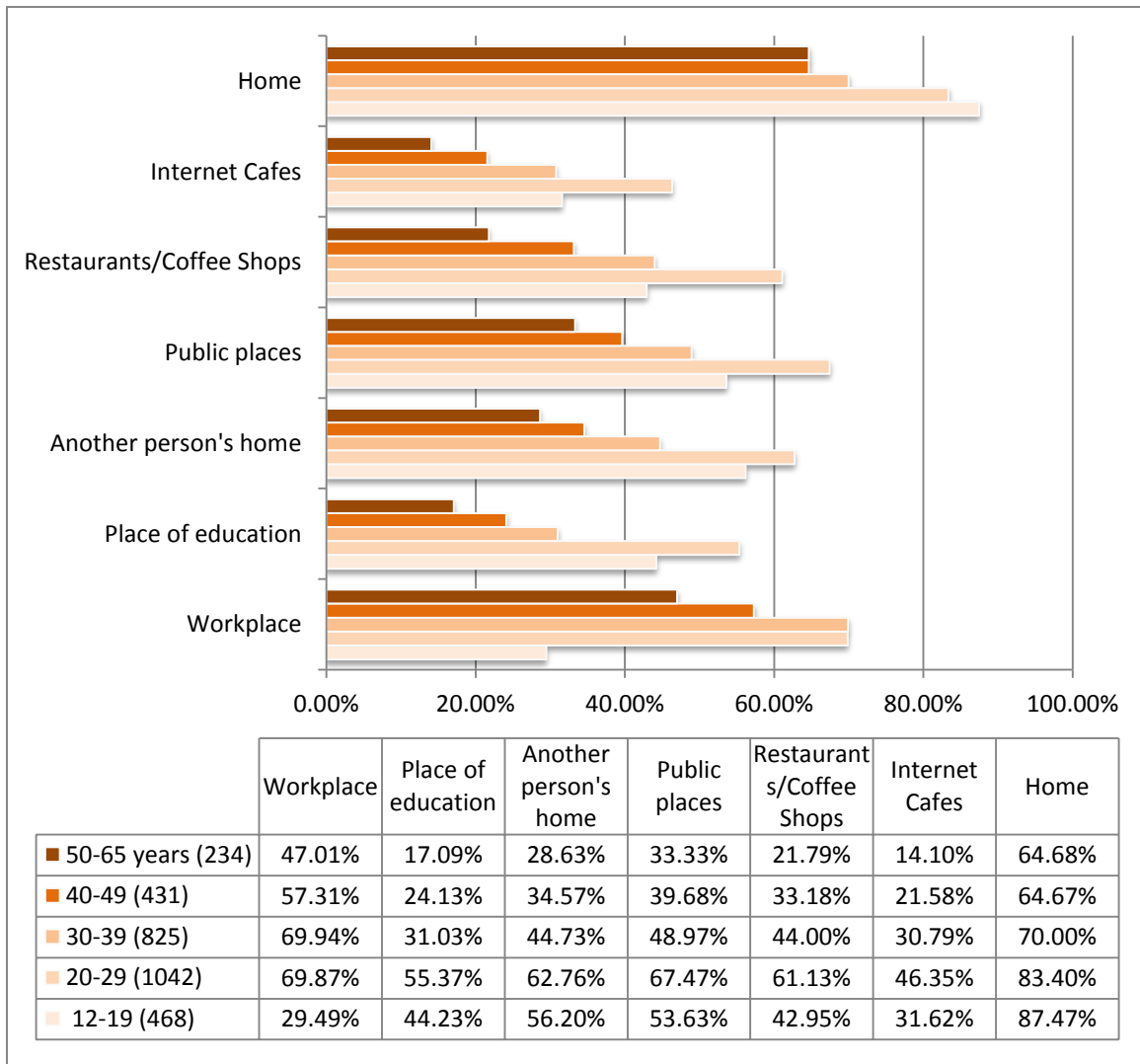
Figure 43: **Place of using Internet: Age-Group**[29]

9.1.4 Frequency of Internet Usage
How often do you use the Internet? (Single Choice)

It is observed that 80.18% of the Internet users spend 2 or more hours daily on the Internet and out of all Internet users 25.75% of the Internet users spend more than 8 hours a day on Internet whereas the largest percentage of Internet users (28.58%) spend between 2 to 4 hours a day on Internet, as shown in figure below. Here it should be noted that getting connected to and staying connected with any Internet based service is considered as usage of Internet.

---

[29] 2.36% of the respondents who answered "Others" not shown.
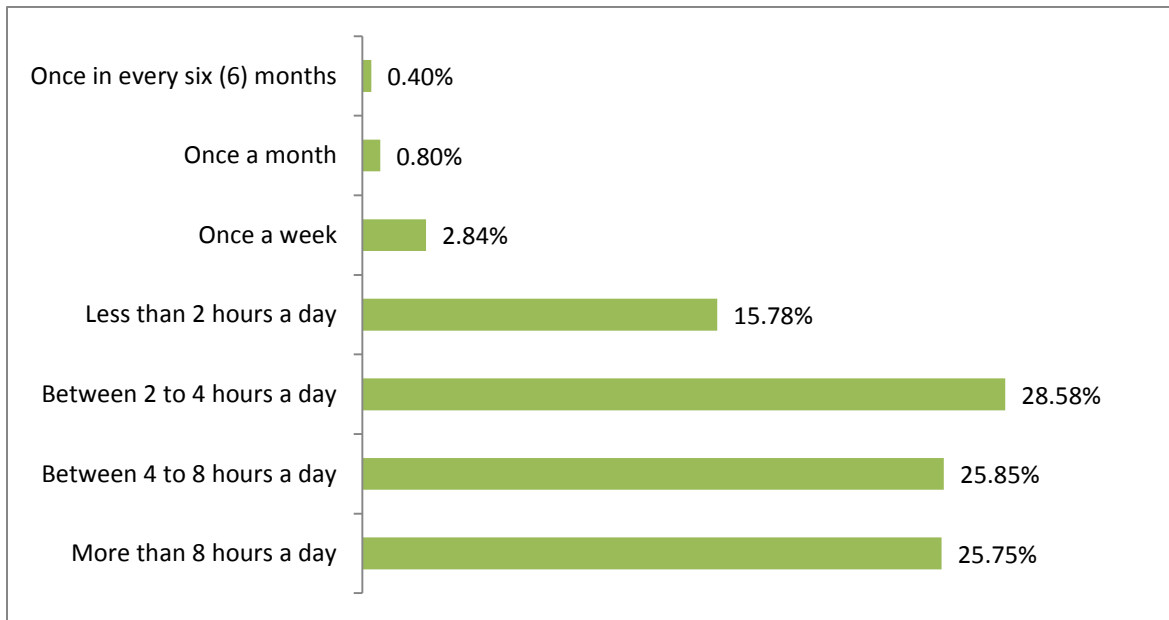
Figure 44:   Frequency of Internet Usage (Total Internet Users – 2739)

Figure 45 and Figure 46 show the Internet usage pattern among respondents (nationality and gender wise respectively). We note that the Saudis, in general, spend more time daily on Internet than Expatriates while on the other hand, females are more heavy users of Internet. Here it should be noted that getting connected to and staying connected with any Internet based service is considered as usage of Internet.
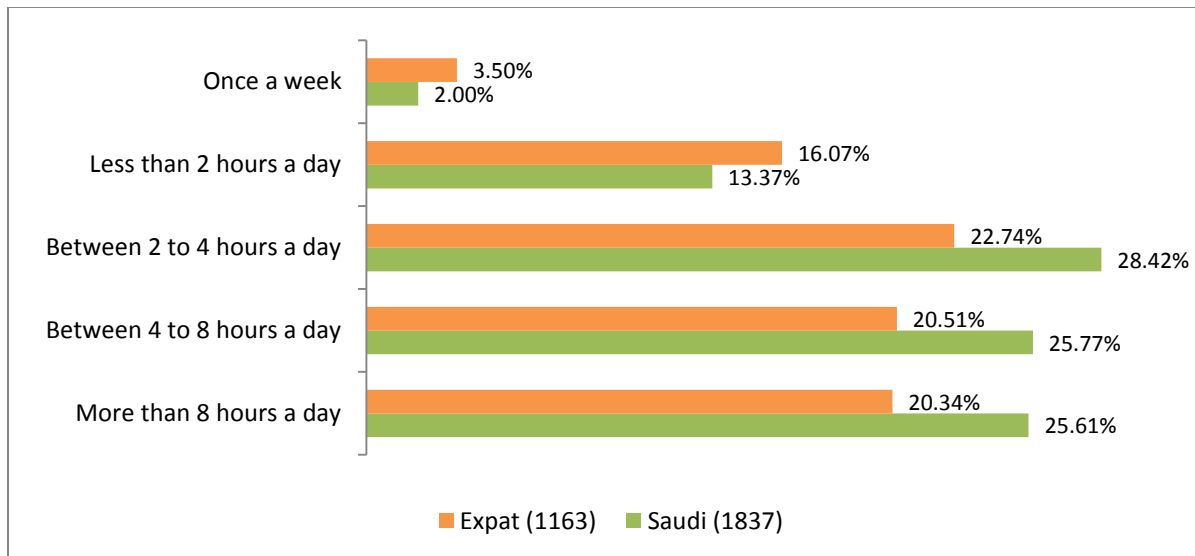
Figure 45:   Frequency of Internet Usage: Nationality-wise
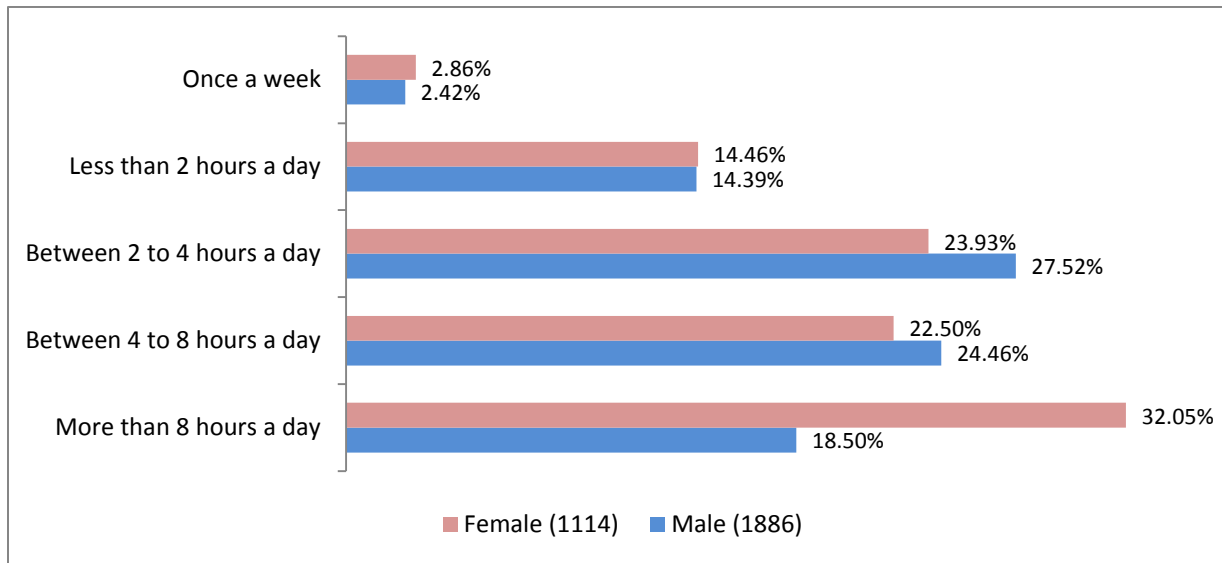
Figure 46: **Frequency of Internet Usage: Gender-wise**

It is noted in Figure 47 that the highest usage percentage of Internet is among respondents aged between 12 and 19 years. Here it should be noted that getting connected to and staying connected with any Internet based service is considered as usage of Internet.

	More than 8 hours a day	Between 4 to 8 hours a day	Between 2 to 4 hours a day	Less than 2 hours a day	Once a week
▇ 50-65 years (234)	8.51%	13.19%	24.26%	27.66%	3.83%
▇ 40-49 (431)	10.16%	17.32%	28.18%	23.33%	3.93%
▇ 30-39 (825)	17.35%	23.61%	29.64%	14.82%	2.05%
▇ 20-29 (1042)	31.87%	28.53%	25.48%	8.30%	2.19%
▇ 12-19 (468)	36.09%	24.20%	20.81%	12.53%	2.55%
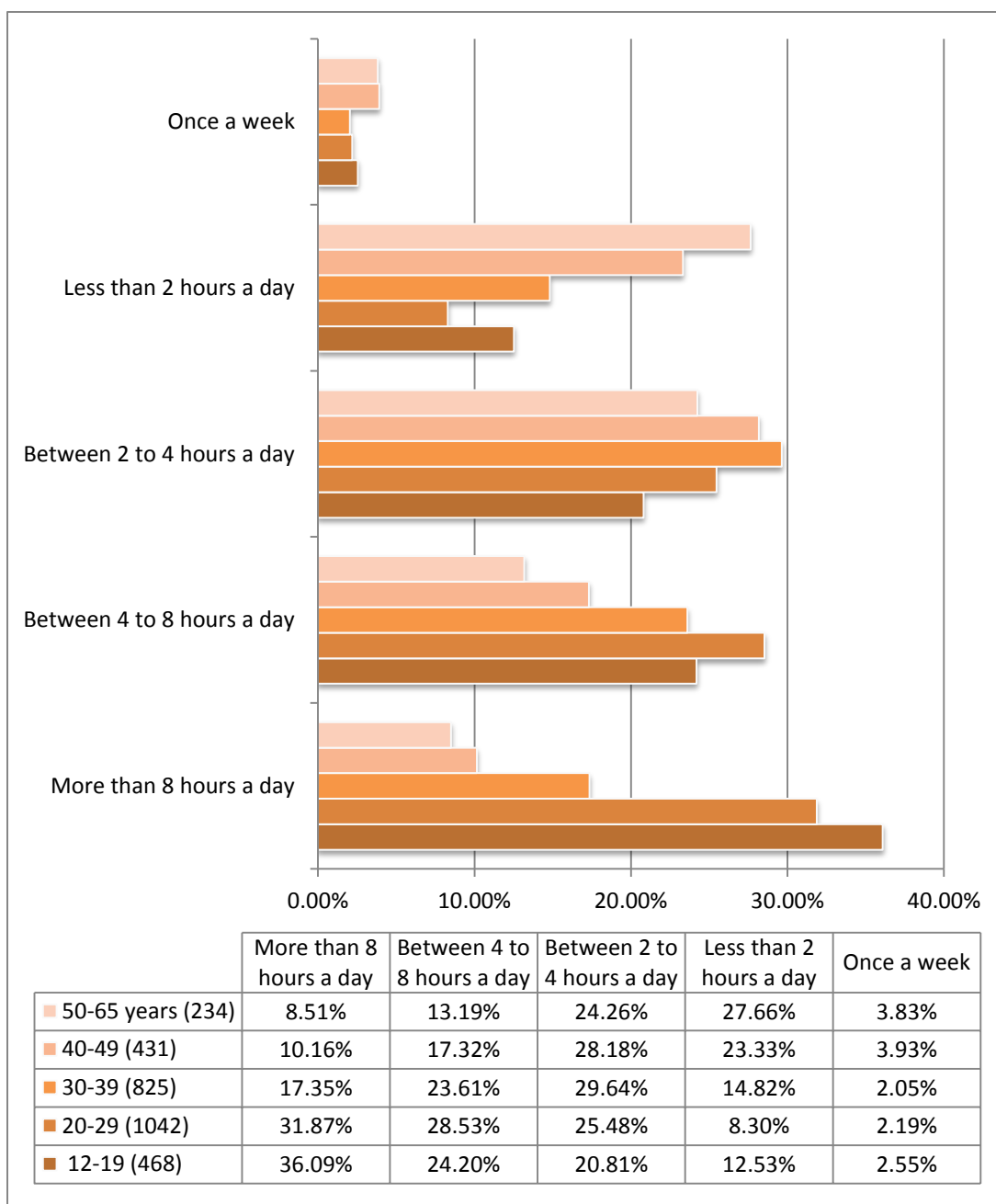
Figure 47:   Frequency of Internet Usage: Age-wise

Figure 48 shows the Internet usage pattern among respondents with reference to marital status.

	More than 8 hours a day	Between 4 to 8 hours a day	Between 2 to 4 hours a day	Less than 2 hours a day	Once a week
Widow(er) (25)	8.00%	4.00%	16.00%	8.00%	0.00%
Divorced (54)	27.78%	24.07%	9.26%	9.26%	1.85%
Married with children (1140)	14.65%	20.96%	30.96%	21.49%	2.89%
Married without children (323)	17.03%	25.08%	31.89%	10.22%	2.48%
Single (1322)	35.02%	27.23%	21.79%	10.21%	2.27%
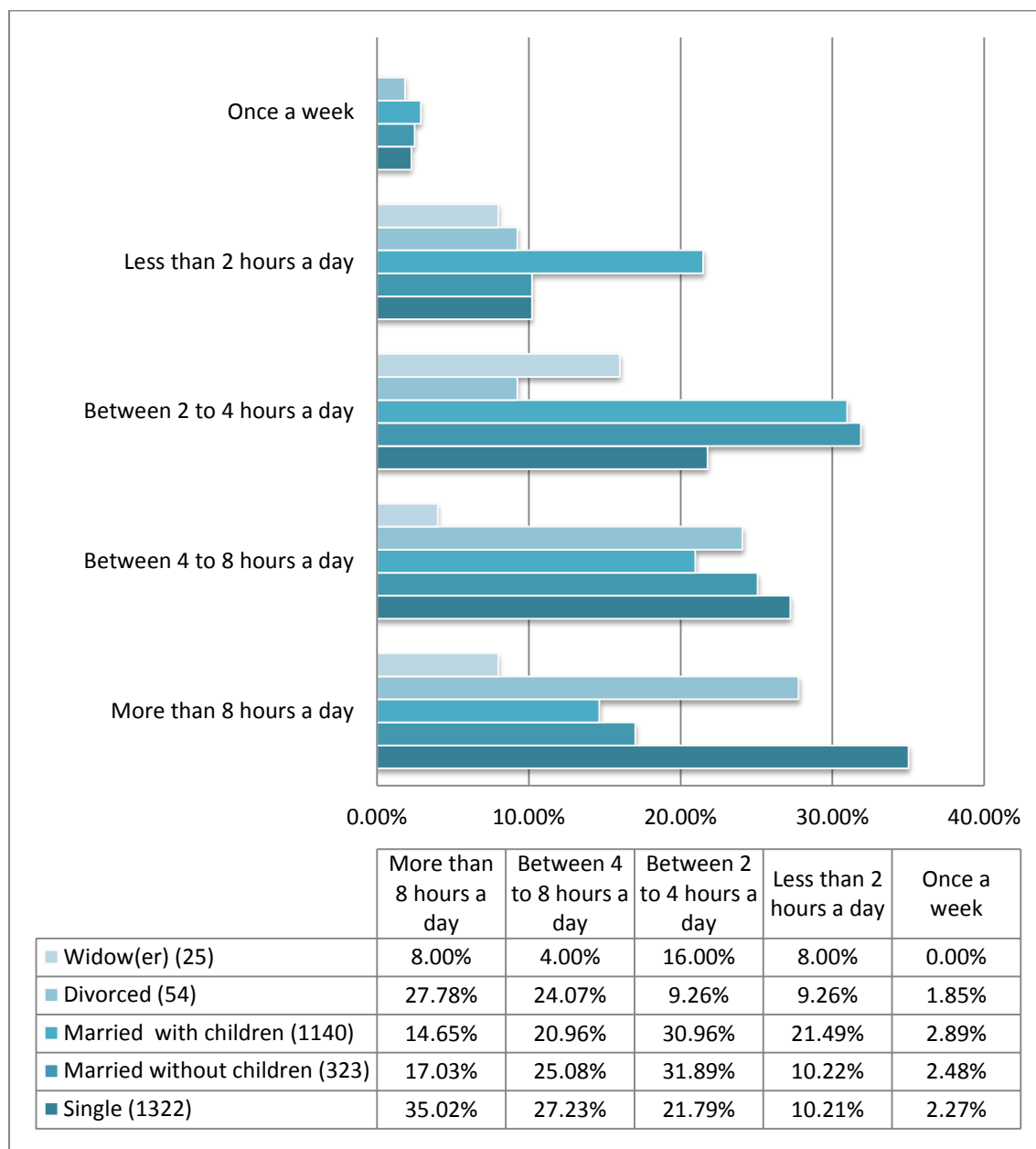
Figure 48:   Frequency of Internet Usage: Marital Status-wise

It is noted in Figure 49 that the highest usage percentage of Internet is among Students.

	More than 8 hours a day	Between 4 to 8 hours a day	Between 2 to 4 hours a day	Less than 2 hours a day	Once a week
Unemployed (108)	24.07%	22.22%	25.00%	9.26%	2.78%
Retired (42)	11.90%	7.14%	28.57%	26.19%	7.14%
Self-employed (179)	18.44%	14.53%	22.35%	9.50%	5.03%
Employed with government (529)	15.88%	28.17%	29.87%	20.60%	1.32%
Employed with a company (936)	19.98%	23.29%	28.85%	17.31%	2.78%
Homemaker/Housewife (235)	15.74%	14.47%	33.19%	20.00%	2.98%
Student (841)	38.17%	29.49%	20.93%	7.97%	1.90%

Figure 49: Frequency of Internet Usage: Employment-wise

9.2   Mobile Internet Services

9.2.1   Use of Mobile Internet

When was the last time you used mobile Internet? (Single Choice)

The Mobile Internet usage is found to be 80.81% in the last six (6) month. Figure 51 and Figure 52 show the Mobile Internet usage among different nationalities and genders respectively. It is to be noted here that the target respondents were aged from 12 to 65 years old.

It is found that mobile Internet deployment all over the Kingdom is same. It is interesting to note that Females use more mobile Interne services than Males whereas Saudis use more Mobile Internet when compared to other nationalities.

Table 8.   When did the user last use the Mobile Internet?

Last Internet Use	% of all Respondents
Within the last month	77.53%
Within the last 3 months	2.29%
Within the last 6 months	0.99%
Within the last 12 months	0.60%
Not used Within the last 12 months	0.86%
Never used Internet	8.82%

Do not use Mobile Internet   19.19%

Use Mobile Internet   80.81%
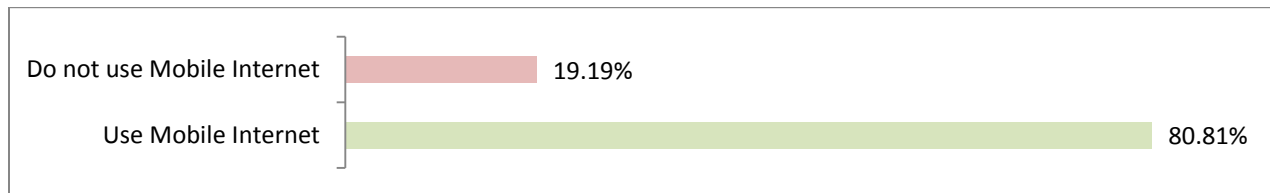
Figure 50:   Users of Mobile Internet (% of all 3000 respondents)[30]

---

[30] Internet users who answered this question were aged from 12 to 65 years old.

Figure 51:   Mobile Internet Usage: Nationality-wise
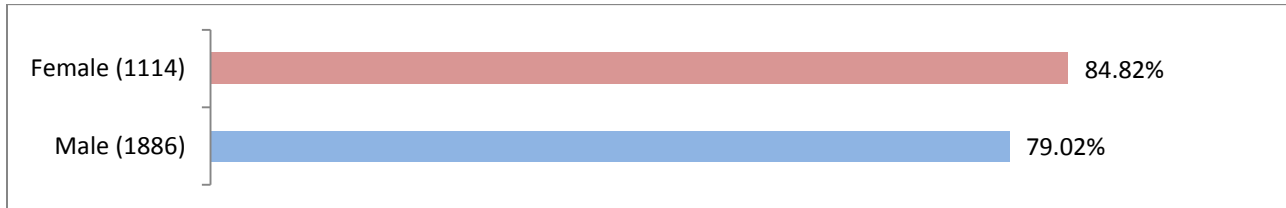
Figure 52:   Mobile Internet Usage: Gender-wise

Figure 53 below shows the usage of Mobile Internet for all the age-groups. It is noted that the usage is higher among the 20-29 years old users and lowest for the eldest aged group of 50-65 years.
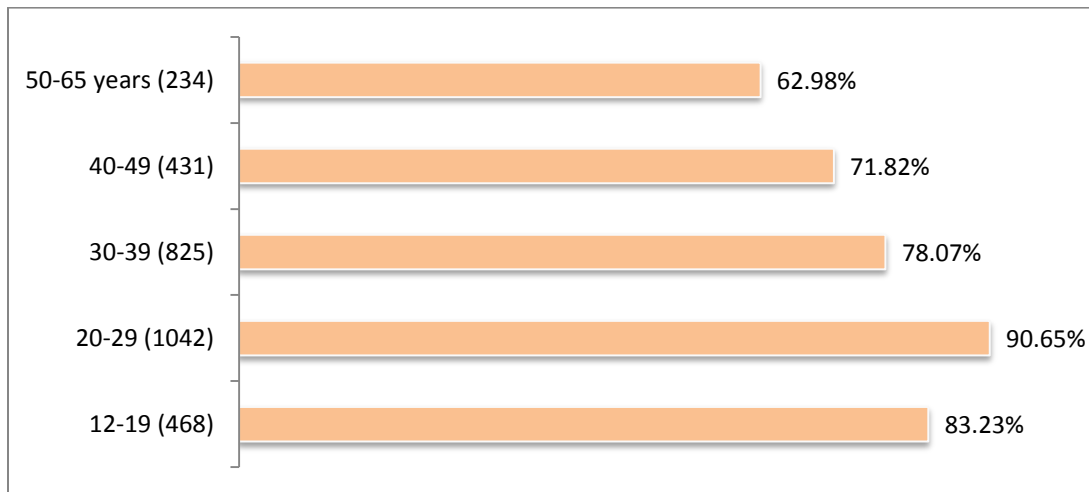
Figure 53:   Mobile Internet Usage: Age-Group

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9.2.2   Reasons for not using Mobile Internet Services

What are your reasons for not using mobile Internet services? (Multiple Choice)

Nearly two-thirds of the non-users of Mobile Internet (61.61%) said that they do not need Mobile Internet services, while 22.58% of them mentioned that the Mobile Internet is not affordable.
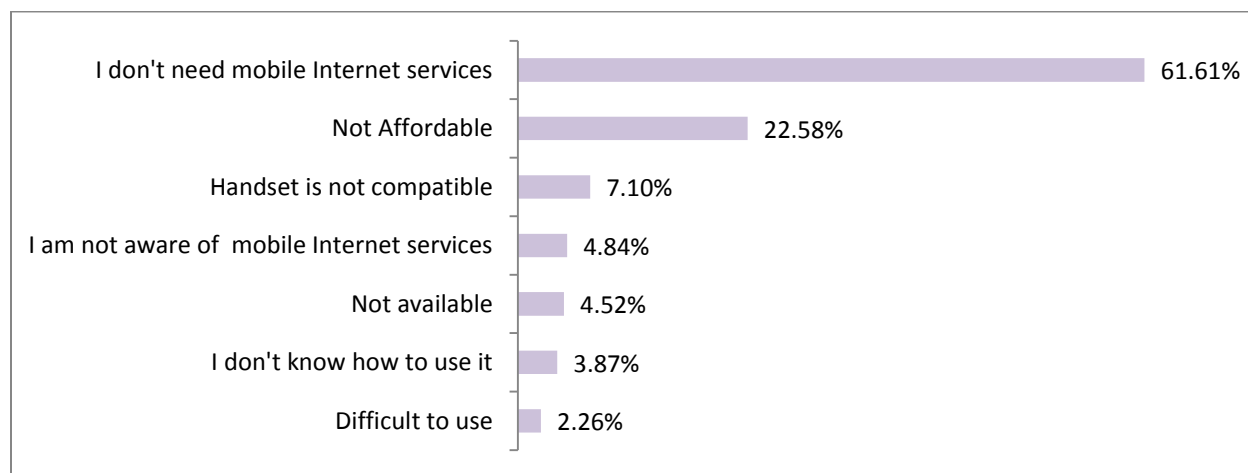
Figure 54:   Reasons for not using Mobile Internet Services (Total non-users – 576) [31]

9.2.3   Subscription of Mobile Internet Services

How many mobile Internet subscription(s) do you have under your own name?

As found, out of all Mobile Internet users, 74.69% (1,811 users) have *subscriptions* under their own names.
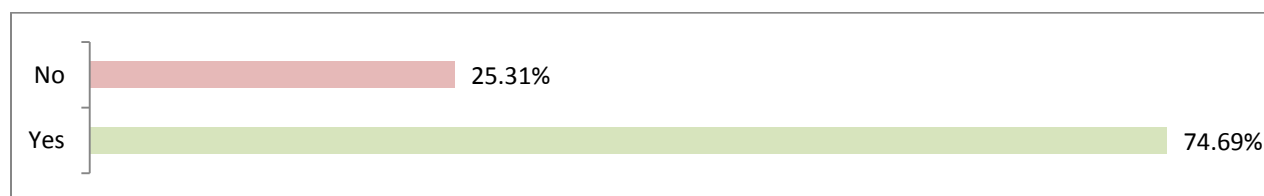
Figure 55:   Mobile Internet Subscribers (Total Mobile Internet Users - 2424)

---

[31] 16.13% respondents who answered "Others" are not shown.

The total *subscription Mobile Internet SIMs* is found to be 103.08% among the users (i.e. 2499 SIMs are subscribed by 2424 users) which means on an average each user has subscribed to 1.03 Mobile Internet SIMs).

9.2.4 Type of Mobile Internet Access being used

What type of mobile Internet access method do you use? (Single Choice)

It is noted that nearly twice as many people use Mobile Internet through Data/Voice SIMs (46.24%) than through (Dedicated) Data Only SIMs (24.49%) as shown in Figure 57.
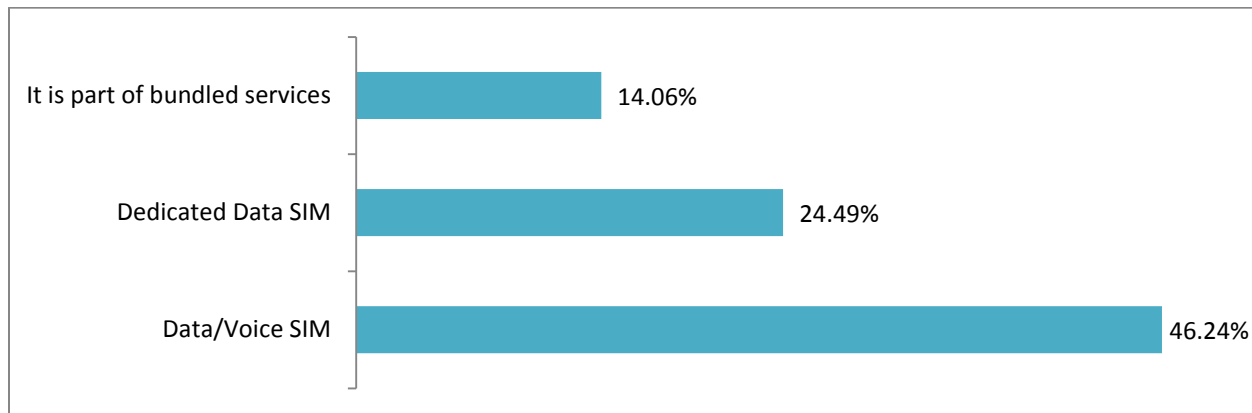
Figure 56:   Type of Mobile Internet SIM Used (Total Mobile Internet Subscribers - 1811) [32]

Figure below shows that most of the users use single Mobile Internet SIM.
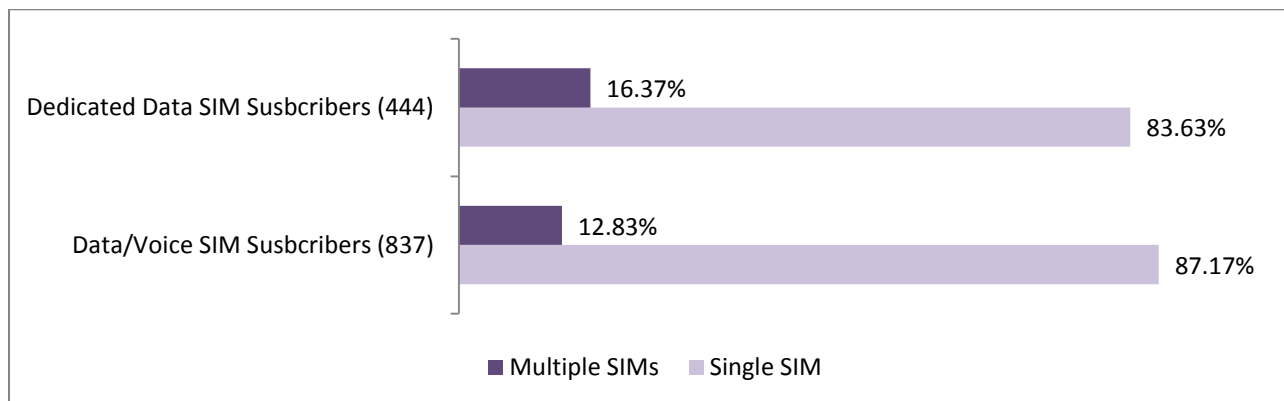
Figure 57:   Mobile Internet SIM(s) used by Mobile Internet Subscribers (Single SIM vs. Multiple SIMs)

---

[32] 23.23% respondents who answered "I don't know" are not shown.

9.2.5 Internet Activities using Mobile Internet Services

For which of the following activities do you access mobile Internet? (Multiple Choice)

Figure below identifies the list of activities which users usually do when using Mobile Internet.

Figure 58:   Internet Activities done using Mobile Internet Services (Total Mobile Internet Users – 2424) [33]

---

[33] 5.45% respondents who answered "Others" are not shown.

9.2.6 Average Monthly Spending on Mobile Internet Services for Primary Line

How much do you spend monthly, on an average, on your primary mobile Internet services subscription under your own name? (Single Choice)

Figure below shows the spending trends among users having Data/Voice SIMs and Dedicated Data SIMs. It is interesting to note that on average, subscribers having Data/Voice SIMs spend SAR 209/- per month while Dedicated Data SIMs subscribers spend SAR 154/- per month.
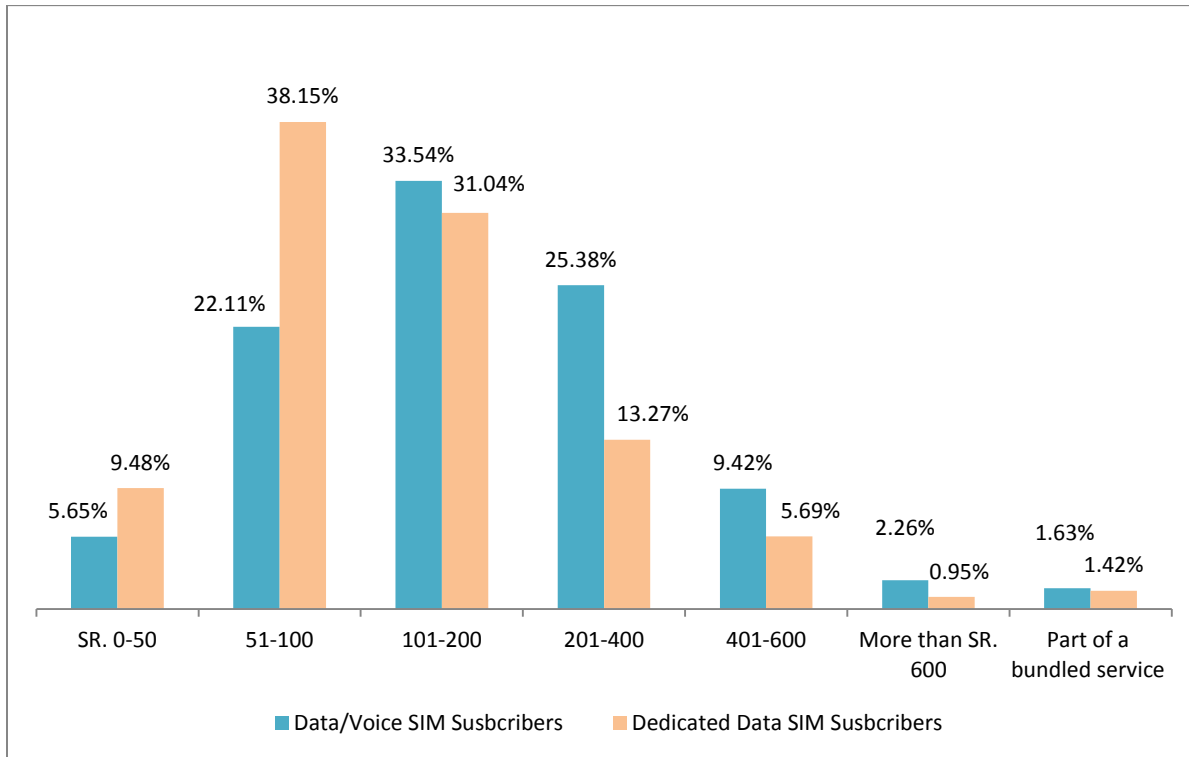
Figure 59:   Average Monthly Spending on Mobile Internet Services[34]

9.2.7 Price Rating for Mobile Internet Services for Primary Line

Please rate the price of your primary mobile Internet services subscription for following.

On average, subscribers rated the prices of mobile Internet services as moderate to expensive (2.75). Below figure shows the price rating for different mobile Internet services.

---

[34] 6.16% of respondents who answered "I don't know" are not included in calculation.

Other value added services (e.g. ring back video etc.)	2.83
Mobile Internet Subscription	2.67
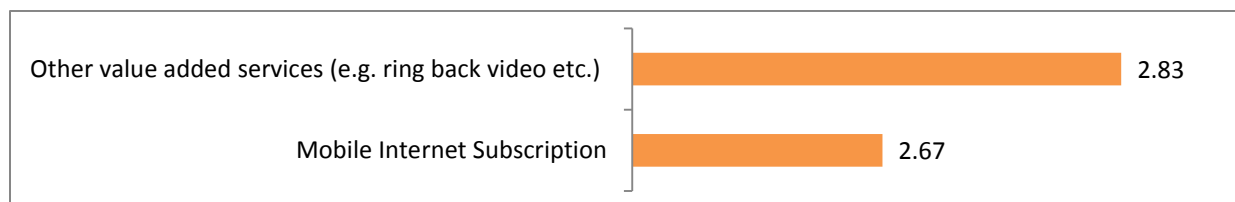
Figure 60:   Price Rating for Mobile Internet Services

9.2.8   Satisfaction Rating for Mobile Internet Services for Primary Line

Please rate your satisfaction with your primary mobile Internet services subscription for the following.

On average, respondents rated the quality of mobile Internet services as above Acceptable (3.33) i.e. near to Good. Below figure shows the average satisfaction rating of different mobile Internet services.

Ease of obtaining mobile Internet service(s)	3.62
Other value added services	3.55
Internet speed and response	3.28
Coverage in your area	3.23
Service support	3.14
Ease of cancelling mobile Internet service(s) subscription	3.14
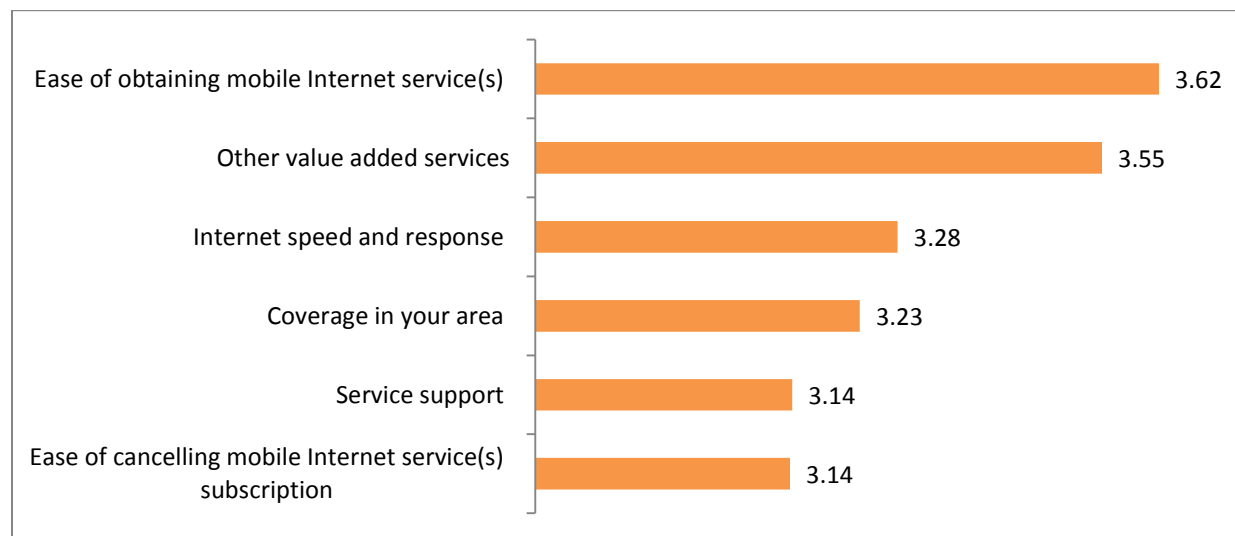
Figure 61:   Satisfaction Rating for Mobile Internet Services

9.3   Internet Usage at Home

9.3.1   Use of Internet at Home

Do you use Internet service(s) at home? (Single Choice)

The Internet usage at home is found to be 76.27% of all Internet Users. Figure 64 through Figure 66 show the Internet usage at home among different nationalities, genders and age-groups respectively. It is interesting to note that Females use more Internet at home services than Males whereas Saudis use Internet at home more than other nationalities.
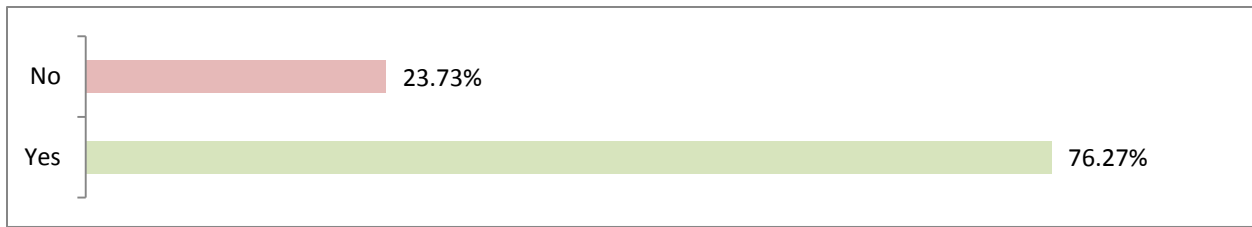
Figure 62: **Users of Internet at Home (% of all 3000 respondents)**
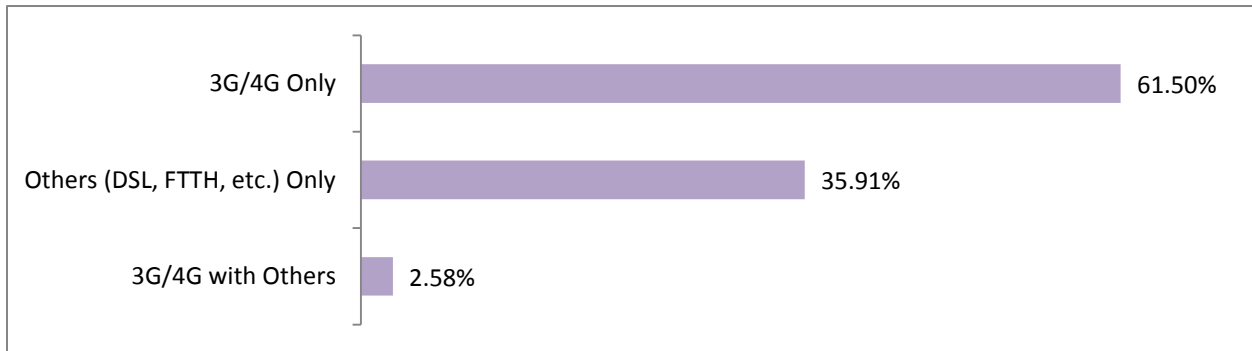
Figure 63: **Type of Internet Access Method at Home (Total Internet Users at Home – 2288)**
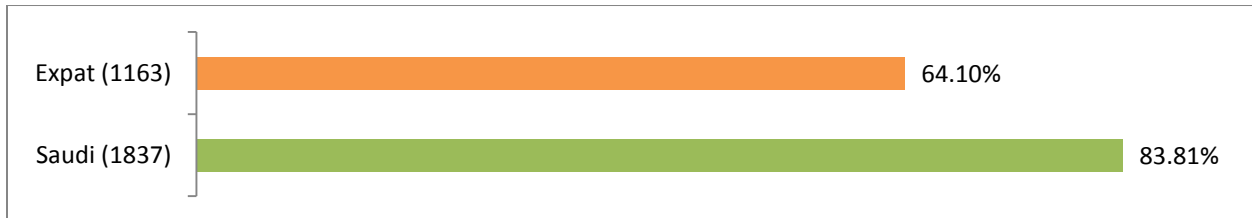
Figure 64: **Users of Internet at Home: Nationality-wise**
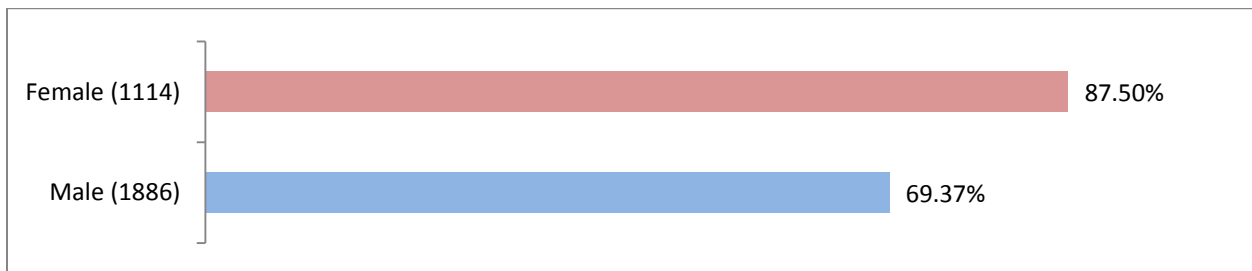
Figure 65: **Users of Internet at Home: Gender-wise**
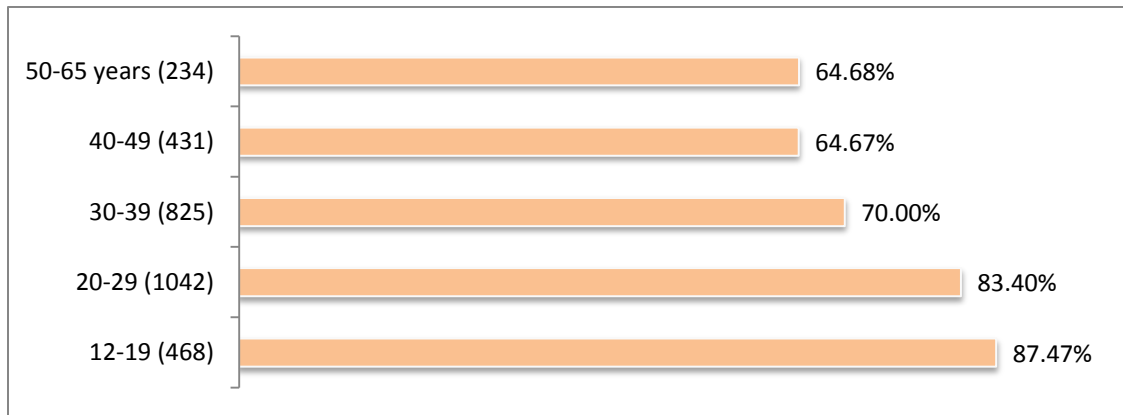
Figure 66:   Users of Internet at Home: Age-Group

9.3.2   Reasons for not using Internet at Home

What are your reasons for not using Internet services at home? (Multiple Choice)

38.28% of the non-users said they do not use Internet at home because they use Mobile Internet while 12.69% of them mentioned that they do not need Internet at home because they use Internet at workplace.
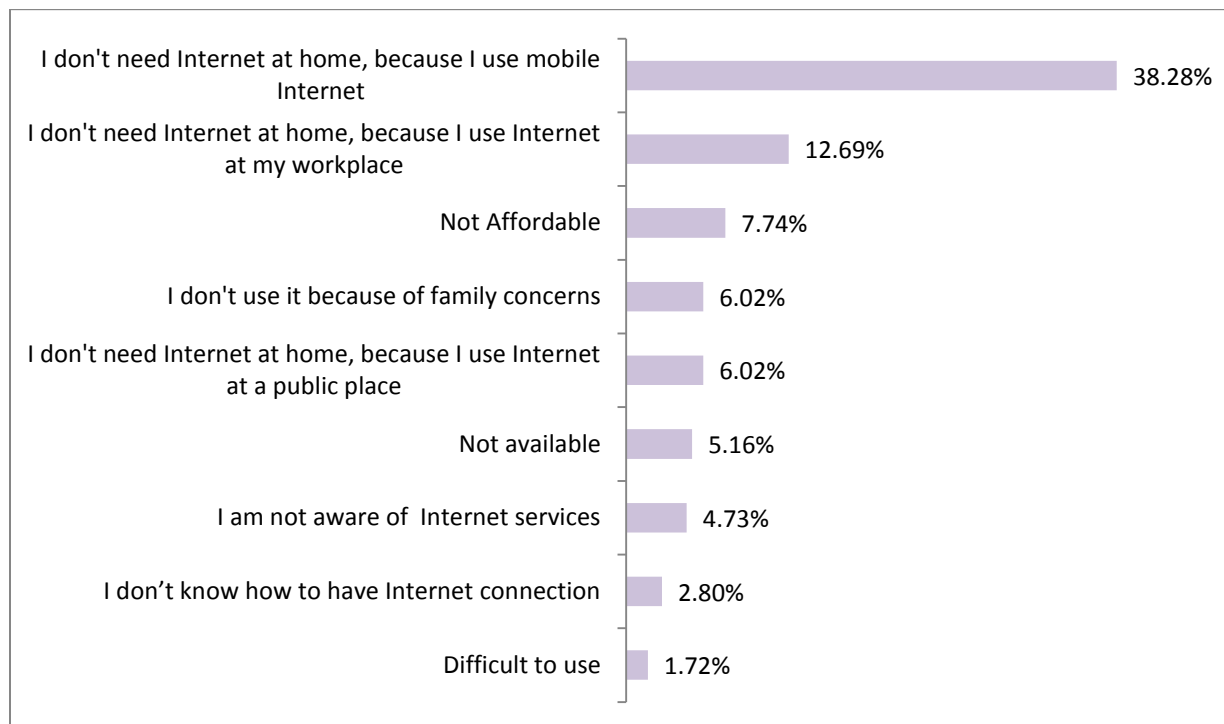
Figure 67:   Reasons for not using Internet at Home (Internet non-users at Home – 712) [35]

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[35] 39.35% of respondents who answered "Others" are not shown.

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9.3.3   Internet at Home using 3G/4G Service

Internet Activities that users do at Home

Below Figure indicates the list of Internet activities which usually users do when use Internet at Home using 3G/4G service.
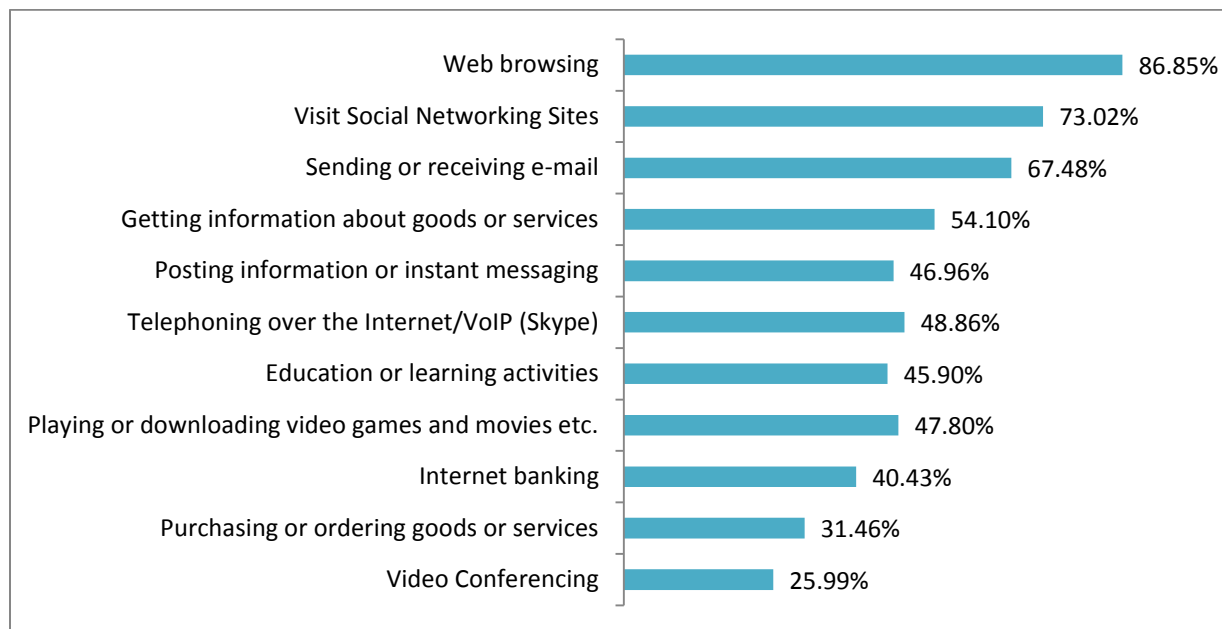
Figure 68:   Internet Activities done at Home (Total Internet users at Home using 3G/4G Internet Only - 1407)

Average Monthly Spending for Internet at Home (3G/4G)

On average, most of the respondents spent between SAR. 51-200 per month for Internet at Home using 3G/4G Dedicated Data SIM. The average monthly spending on for the same is estimated at SAR 160/- .

On average, most of the respondents spent between SAR. 51-400 per month for Internet at Home using 3G/4G Data/Voice SIM. The average monthly spending on for the same is estimated at SAR 333/- .
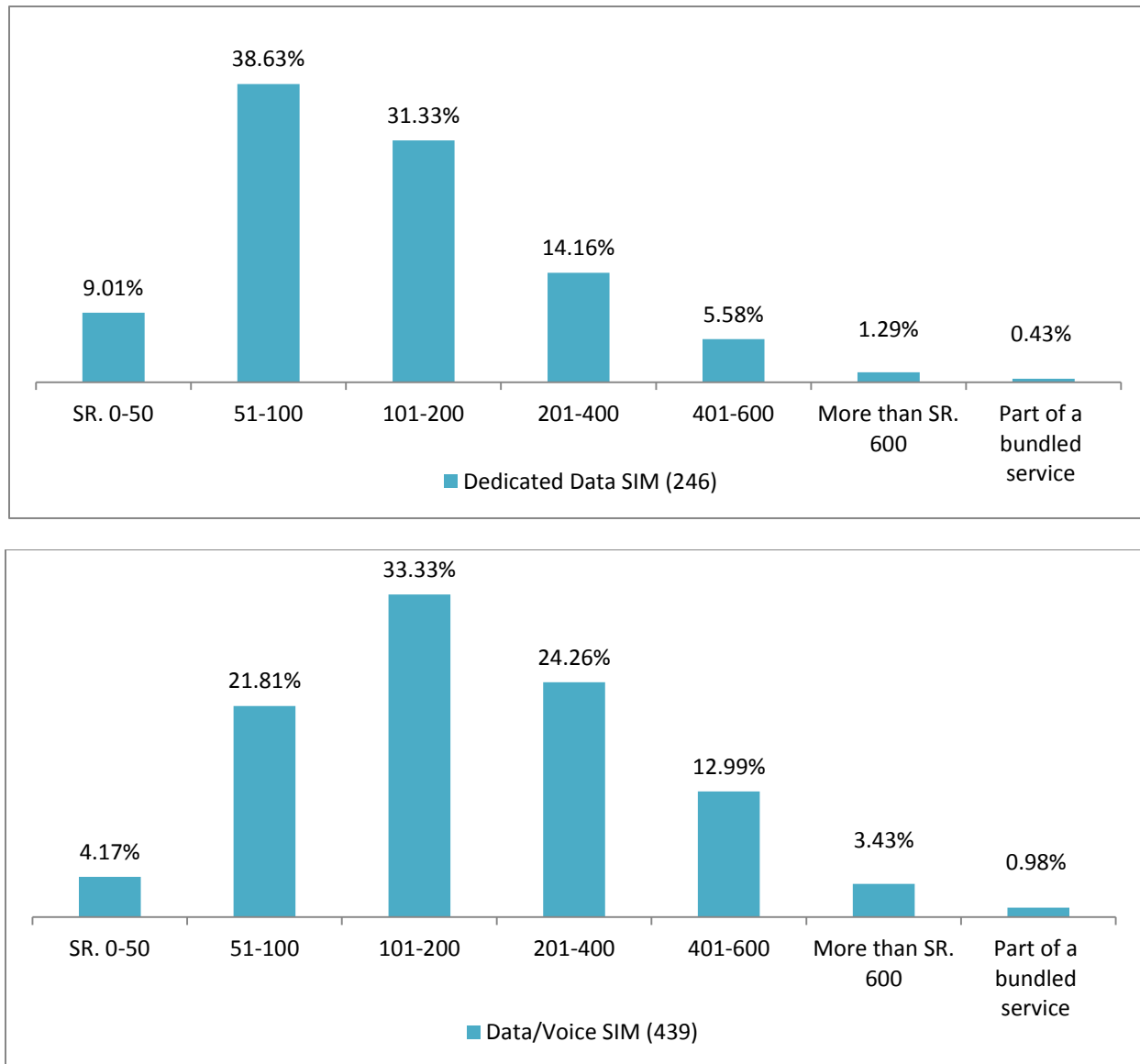
Figure 69:   Average Monthly Spending on Internet at Home (Total Internet users at Home using 3G/4G Internet Only) [36]

Price Rating for Internet at Home

The average price rating for Internet at Home using 3G/4G service is 2.62 (Below Acceptable). Below Figure shows the average price rating for different services.

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[36] Respondents who answered "I don't know" are not included in calculation.
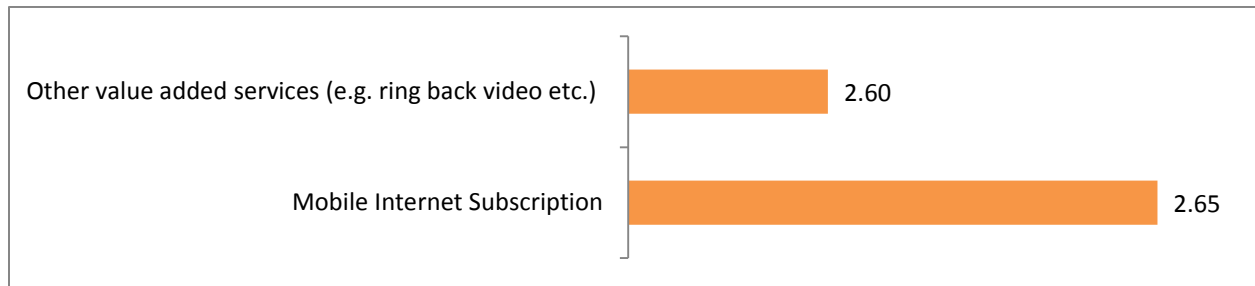
Figure 70: **Price Rating for Internet at Home (Total Internet users at Home using 3G/4G Internet Only)**

Satisfaction Rating for Internet at Home

The average satisfaction score for Internet at Home using 3G/4G service is 3.29 (Above Acceptable). Below Figure shows the average satisfaction levels scores for different services.
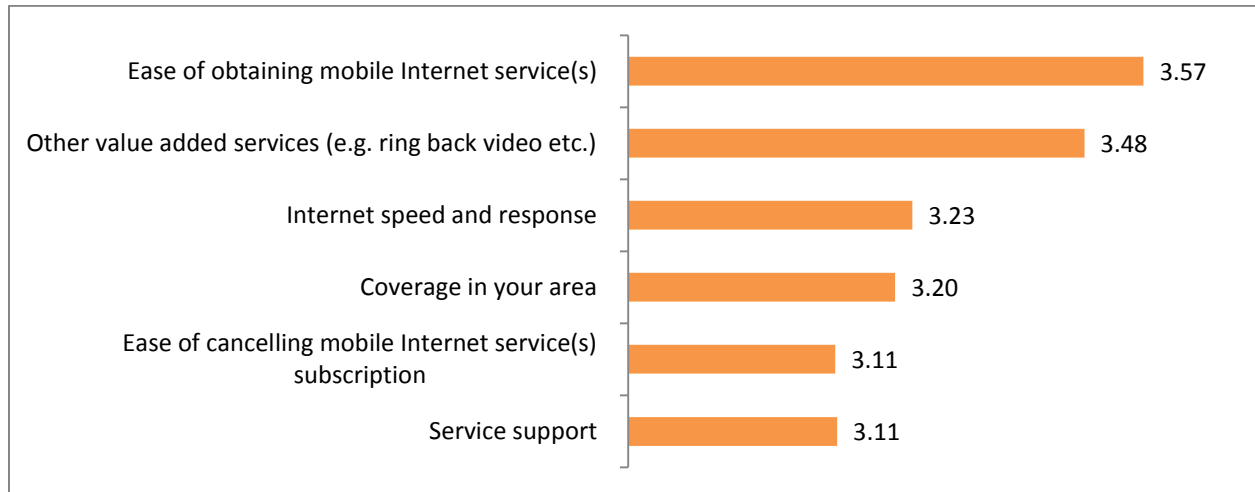
Figure 71: **Satisfaction Rating for Internet Users at Home (Total Internet users at Home using 3G/4G Internet Only)**

9.3.4　Internet at Home using Other Services (DSL, FTTH and Others)

Internet Activities that users do at Home

For which of the following activities do you access Internet from home? (Multiple Choice)

Figure below identifies the list of Internet activities which users usually do at home.

Web browsing — 93.41%
Visit Social Networking Sites — 80.45%
Sending or receiving e-mail — 72.16%
Getting information about goods or services — 64.09%
Telephoning over the Internet/VoIP (Skype) — 60.00%
Posting information or instant messaging — 55.11%
Education or learning activities — 54.55%
Playing or downloading video games and movies etc. — 54.09%
Internet banking — 43.86%
Purchasing or ordering goods or services — 39.20%
Video Conferencing — 31.93%

Figure 72:　Internet Activities done at Home (Total Internet Users at Home Other than 3G/4G Internet Services – 822)

Type(s) of Internet Access(es) at Home
Please describe

a) your Internet access services and

Below Figure reveals an observation that nearly 76% of the respondents access Internet from home by using (DSL).
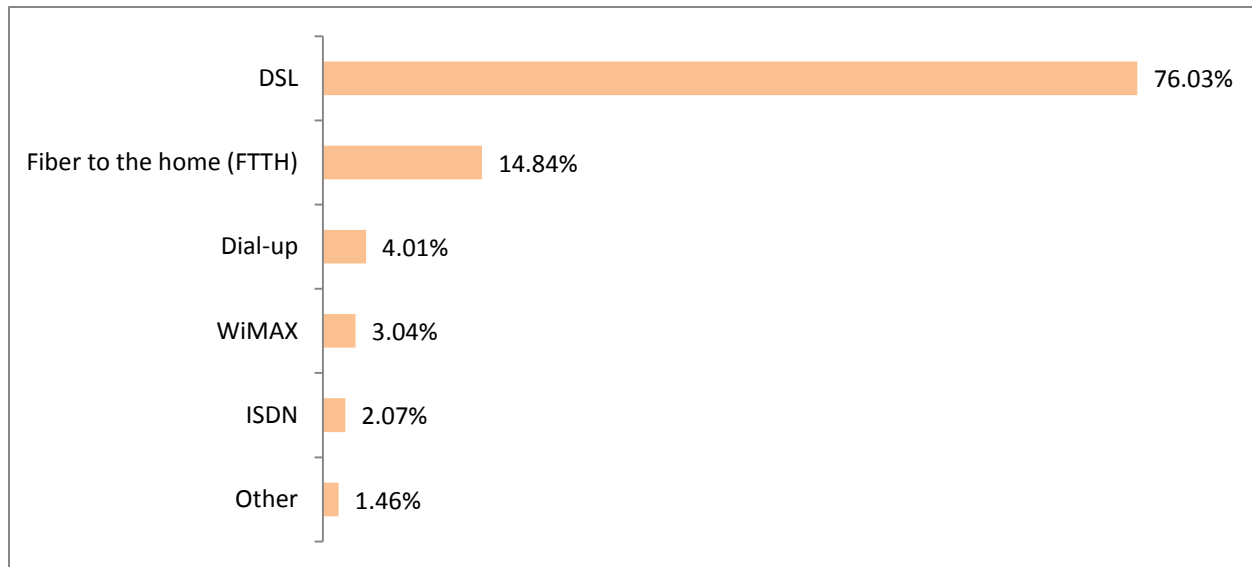
Figure 73: Type(s) of Internet Access at Home (Total Internet Users at Home Other than 3G/4G Internet Services – 822)

b) subscribed bandwidth, at home (Connection Bandwidth not Download Limit)
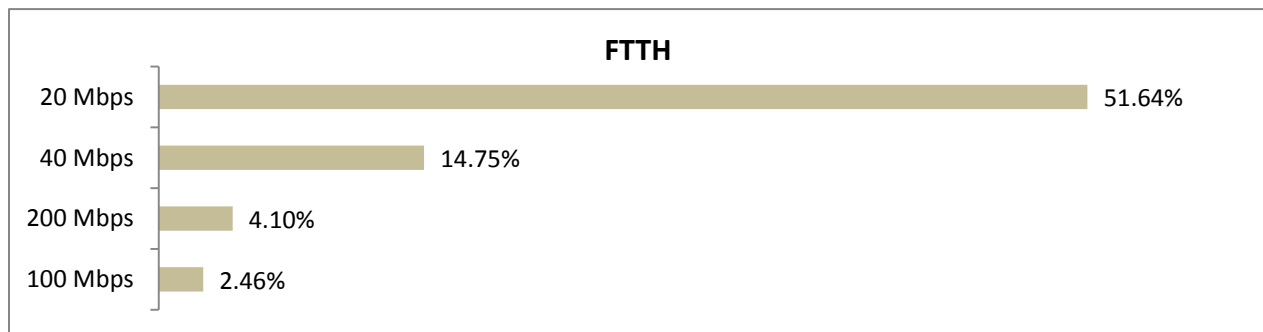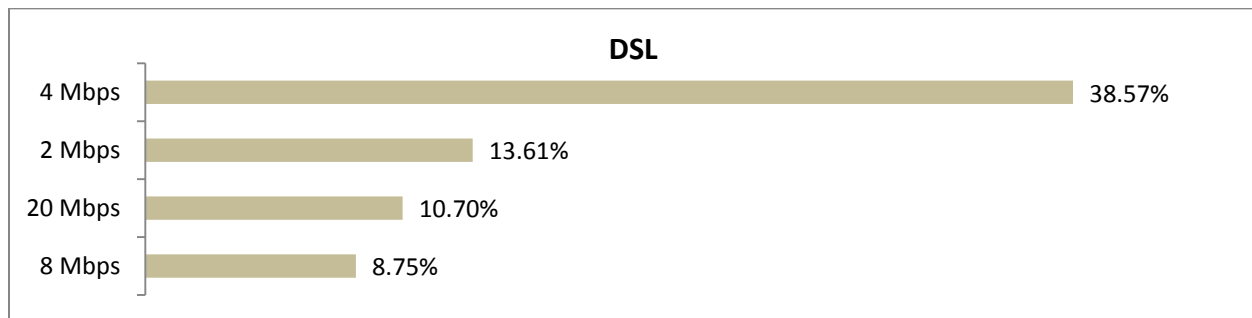
Figure 74: Speed(s) of Types of Internet Access at Home (DSL - 625 users and FTTH – 122 users at Home)

Are you planning to upgrade the Internet bandwidth at your home to any of the following in the next 12 months?

Of the users of DSL/FTTH/Others (excluding 3G/4G) access types at Home, it is observed that 28.98% of the household heads users do not want any increase in the Internet bandwidth at their home and around half (49.12%) have not yet decided.
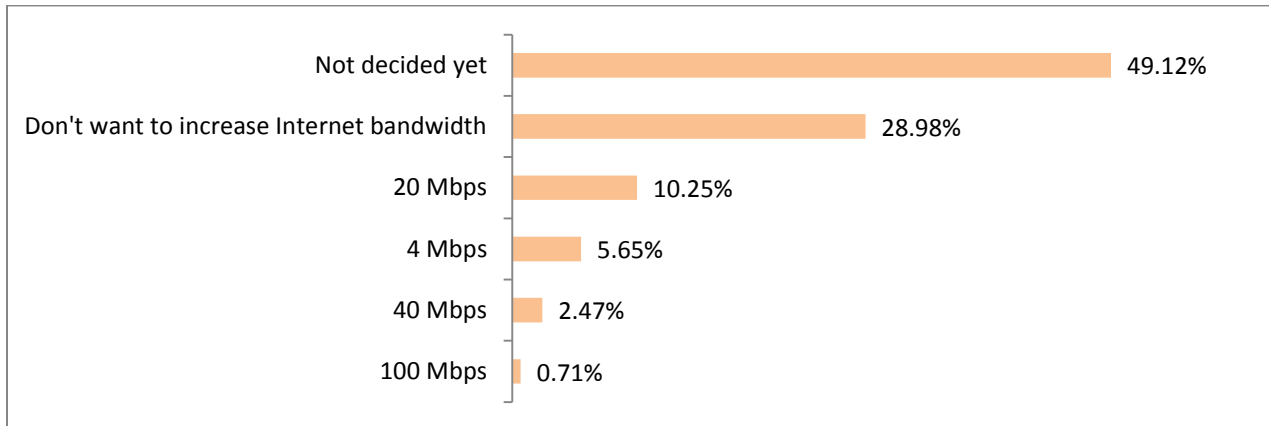
Figure 75:   Planning to increase Internet Speed in the next 12 months (Total Households using Internet at Home Users at Home Other than 3G/4G Internet Services - 283)

Average Monthly Spending for Internet at Home

How much do you spend monthly, on an average, for Internet services at home? (Single Choice)

The average monthly spending for Internet users at home is shown in Figure 76 as users of Other Services (DSL, FTTH, etc.) at home. It is noted that for Internet users at home spend between SR 100 and SR 400 per month. The average monthly spending on Internet at home using other services is estimated at SAR 269/- . In calculating this average the numbers of household users who use Internet Services at Home as a part of Bundled Services (who represent about 3.24%) are not taken into account.
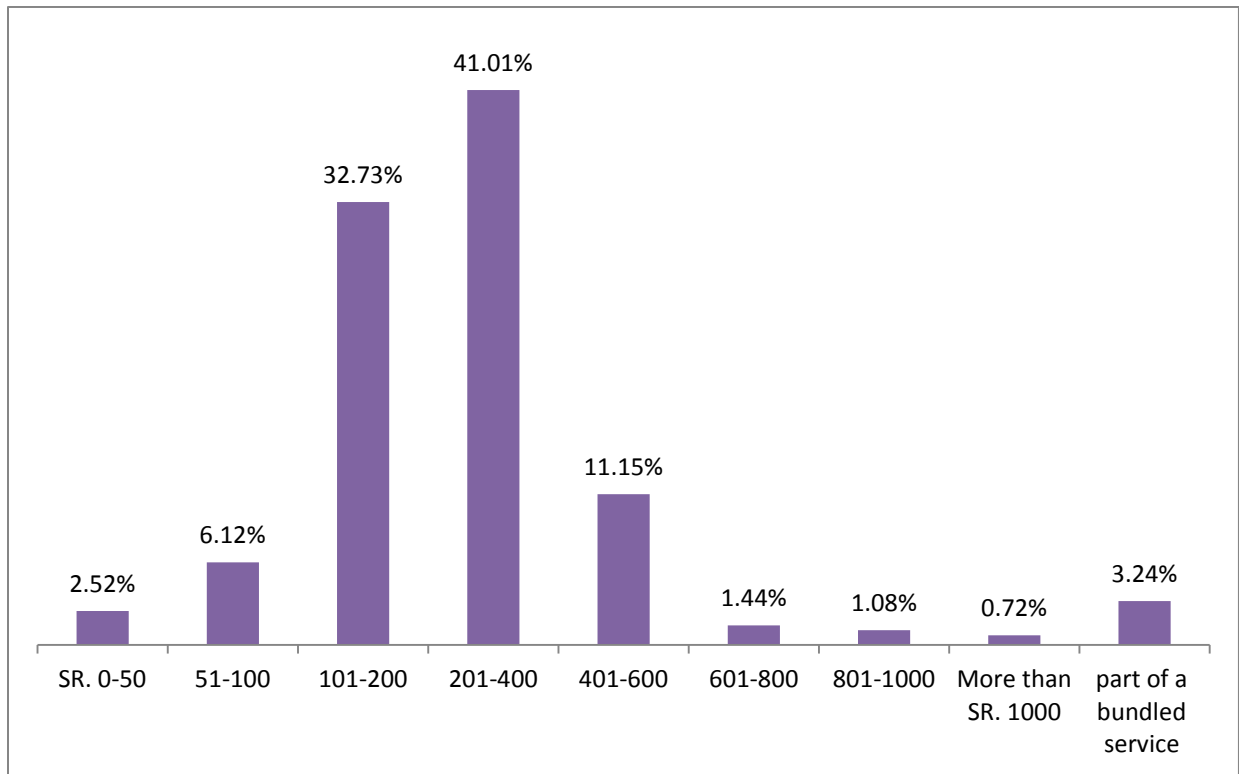
Figure 76: Average Monthly Spending on Internet at Home (Total Households using Internet at Home Users at Home Other than 3G/4G Internet Services - 283) [37]

Price Rating for Internet at Home

Please rate the price of your Internet services at home. (Single Choice)

Figure 77 below shows the level of user satisfaction with the price of Internet services at home. On average, respondents rated the prices of Internet services at home using other services as moderate to expensive (2.54).

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[37] 4.79% respondents answered "I don't know" are not shown.
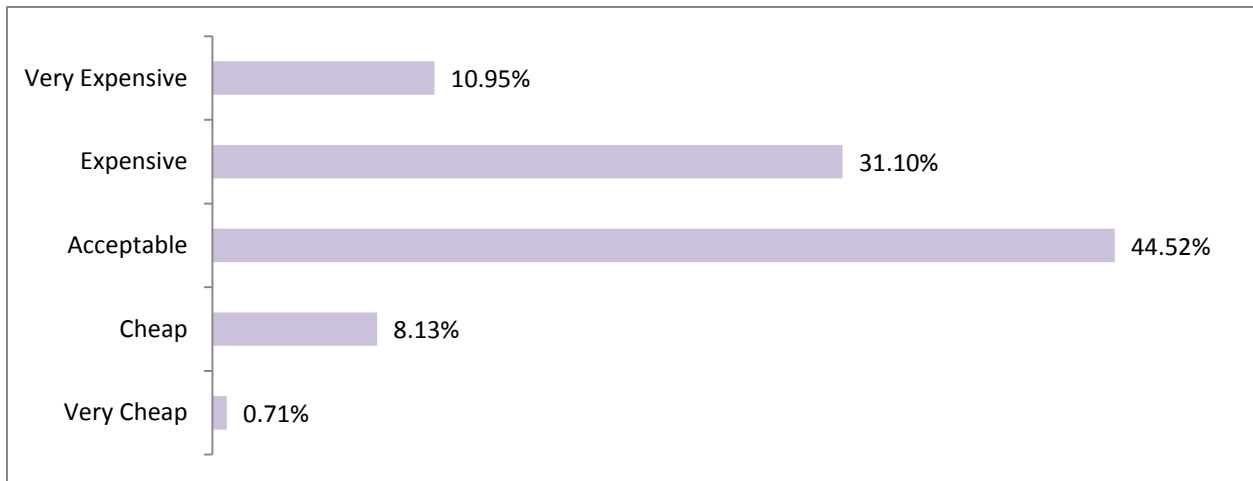
Figure 77: **Price Rating for Internet at Home (Total Households using Internet at Home Users at Home Other than 3G/4G Internet Services - 283)**

Satisfaction Rating for Internet at Home

Please rate your satisfaction with the Internet services at home, for the following:

The overall satisfaction for Internet at Home using Other Services (DSL, FTTH, etc.) is above acceptable (3.18). Below Figure shows the average satisfaction levels scores for different services.
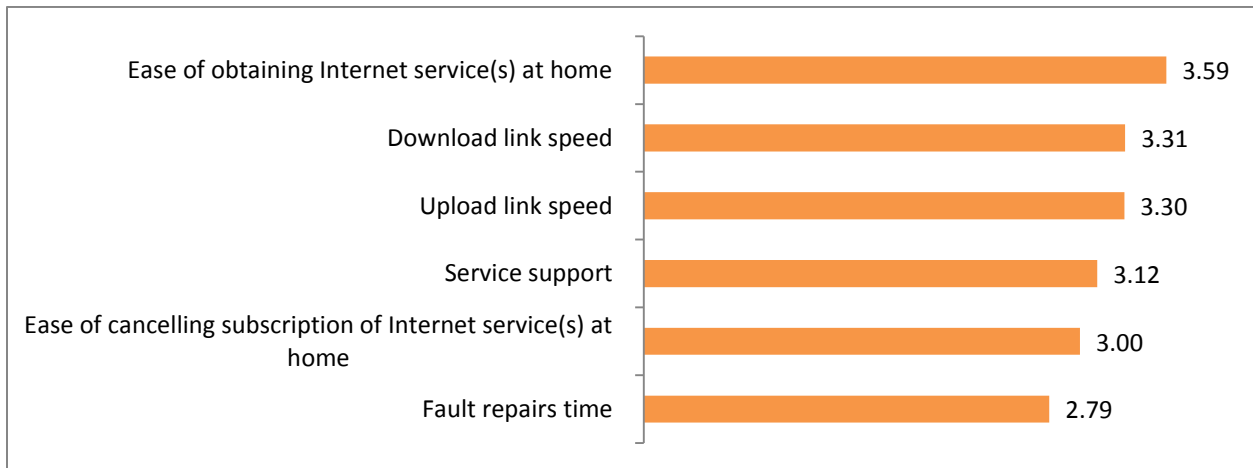
Figure 78: **Satisfaction Rating for Internet Users at Home (Households using Internet at Home Users at Home Other than 3G/4G Internet Services)**

10. Bundled Services

10.1   Use of Bundled Services

Do you use bundled services? (Single Choice)

Figure 79 indicates that around 29.87% of all respondents responded that they use bundled services in one form or another for ICT Services which may include one or more of the services such as Fixed Telephony, Mobile Services (both Voice and Internet), and buying smart devices with Internet packages. Bundled offers include those which combine several services (e.g. Fixed Telephony, Mobile Internet, IPTV, etc.) in one bill.
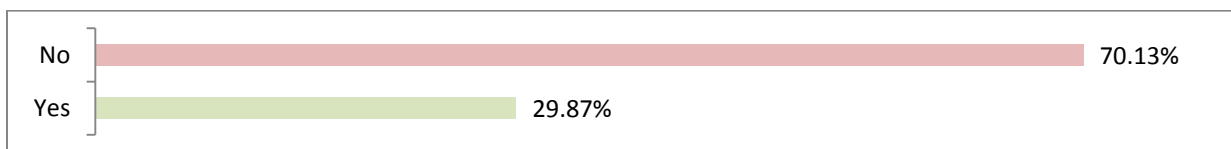
Figure 79:   Users of Bundled Services (% of all 3000 respondents)

10.2   Reasons for not using Bundled Services

What are your reasons for not using bundled services? (Multiple Choice)

Nearly 41.69% of respondents who don't use bundles services indicate that they don't need bundled services while 29.98% of respondents are not aware of bundled services.
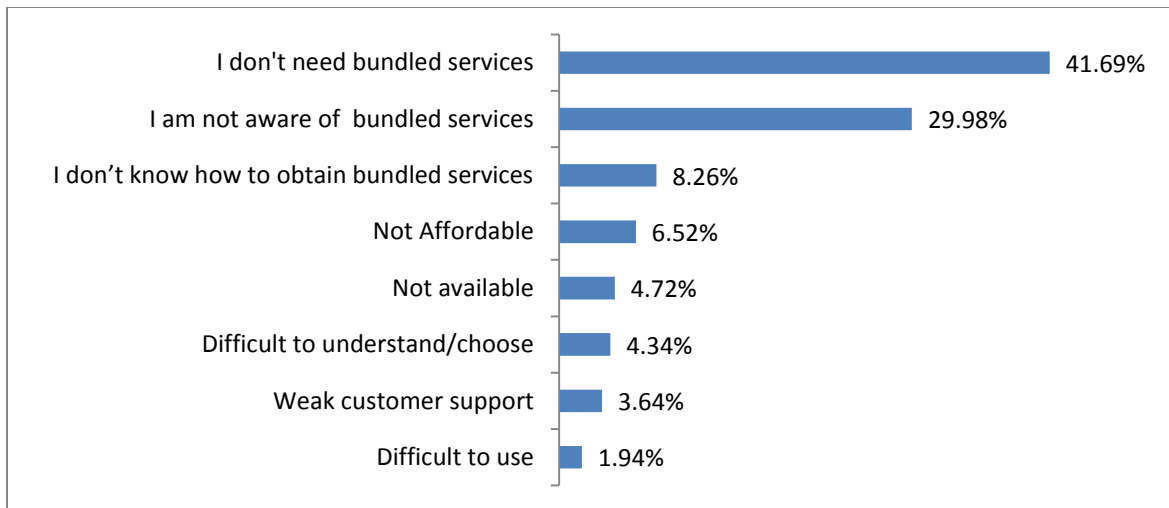
Figure 80:   Reasons for not using Bundled Services (Total non-users – 2104)[38]

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[38] 19.74% respondents who answered "Others" not shown.

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10.3   Types of Bundled Services

Which of the following bundled services do you use? (Multiple Choice)

It is found that nearly 48.28% of bundled services users subscribed to Fixed Telephony with Fixed Internet packages while around 35.37% of them are subscribed to Mobile Voice with Mobile Internet packages.
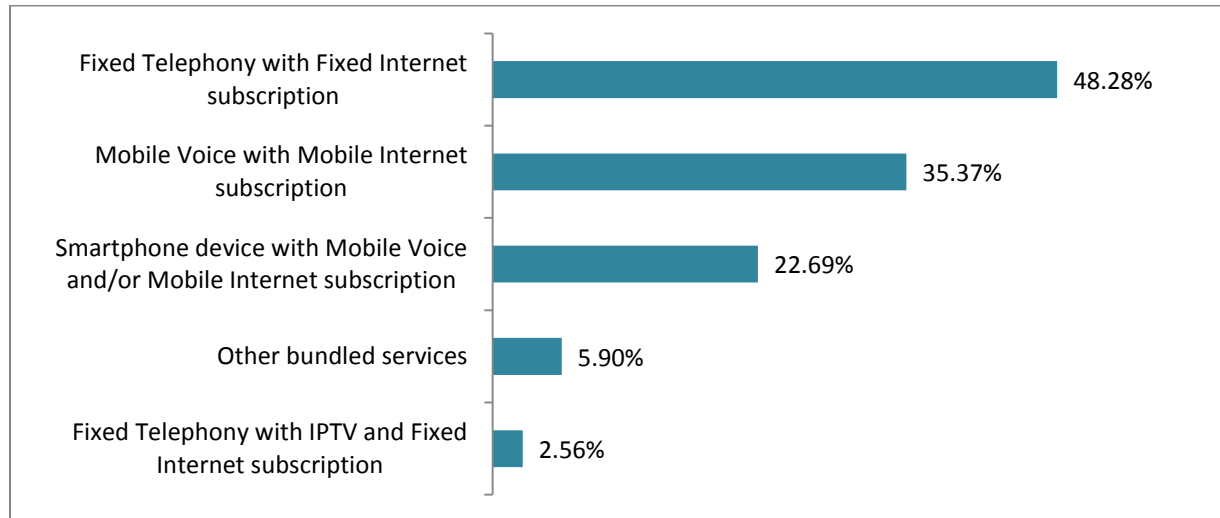
Figure 81:   Types of Bundled Services use (Total Users – 896)

10.4   Average Monthly Spending on Bundled Services

How much do you spend monthly, on an average, for bundled services? (Single Choice)

As evident from Figure 82, most of the household users are spending between SAR 51-400 per month on bundled services. The average spending per user on bundled services is estimated at SAR 249/- .
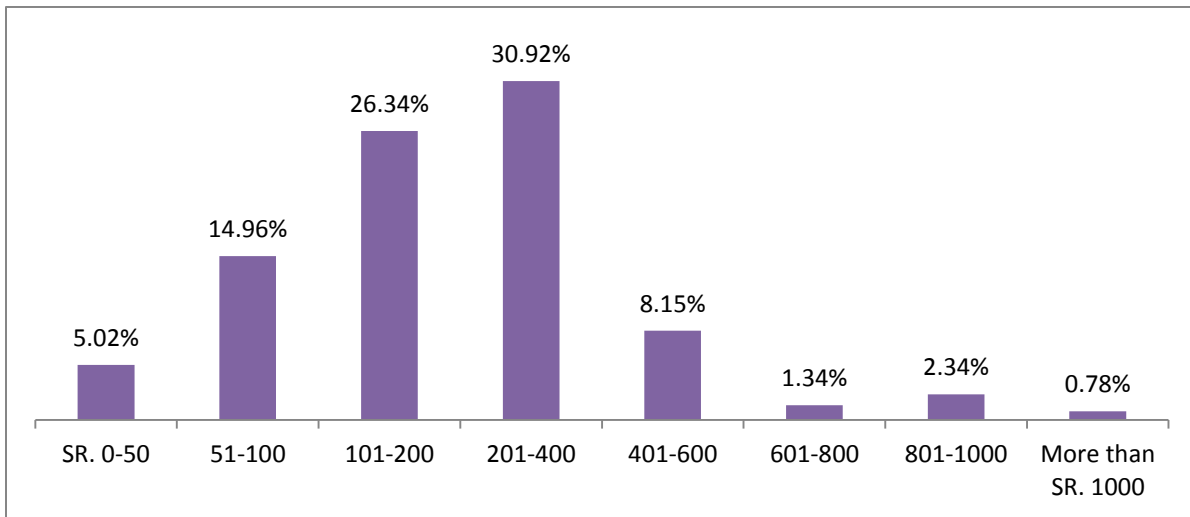
Figure 82:   Average Monthly Spending on Bundled Services (Total Users – 805)[39]

10.5   Satisfaction Rating for Bundled Services

Please rate your overall satisfaction with Bundled Services:

The overall satisfaction rating for Bundled Services is Neutral to Satisfied (3.43).
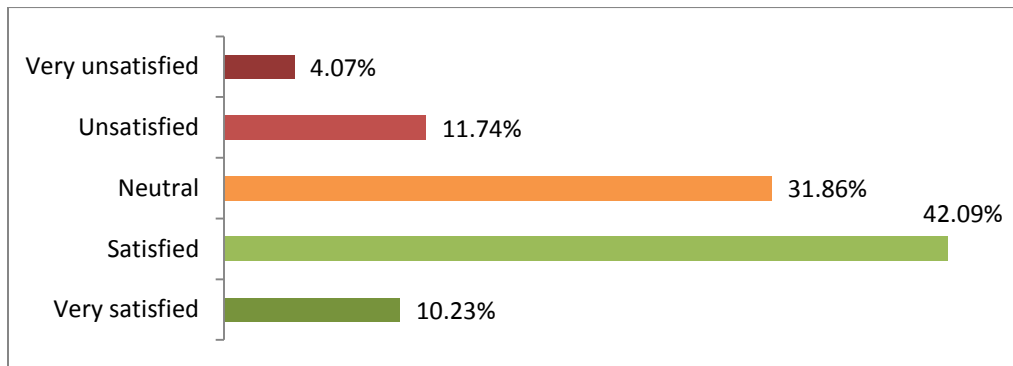
Figure 83:   Overall Satisfaction with Bundled Services[40]

What are your reasons for dissatisfaction with the bundled services? (Multiple Choice)

Those users who are dissatisfied with the bundled services, 70.59% of them mentioned that the service has no value for money.

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[39] 10.16% respondents who answered "I don't know" are not included in calculation.
[40] 4.34% respondents who answered "I don't know" are not included in calculation.

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No value for money	70.59%
Not utilizing all services	30.88%
Forced to subscribe to a bundle	25.74%
No variety of services	19.85%
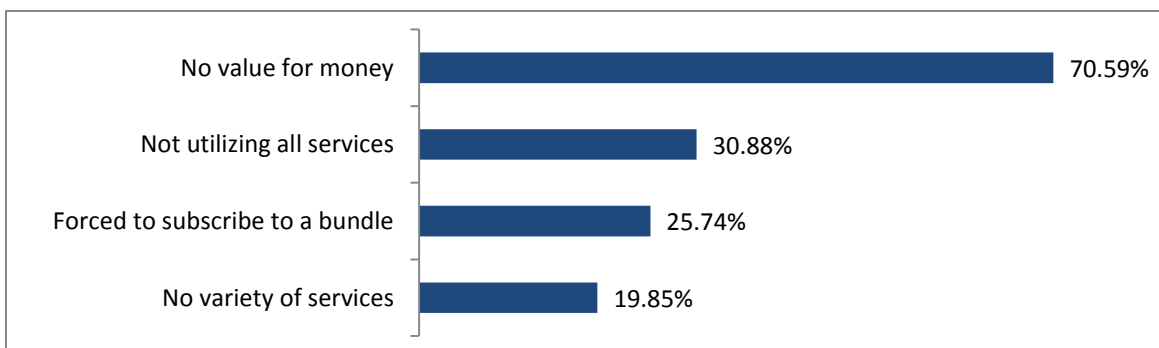
Figure 84:   Reasons for dissatisfaction with the bundled services (Total Unsatisfied Users – 136)[41]

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[41] 12.50% respondents who answered "Others" not shown.

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11. Computers, Devices and Gaming Consoles

11.1 Use of Computers {desktop/laptop/tablets}

Do you use a computer device {desktop/laptop/tablets}? (Single Choice)

It is evident from the following figure that 77.10% of the respondents use computer devices such as desktop, laptop or tablet. It is also found that Saudis use more computer devices than Expatriates. On the other hand, females use them more than males. Respondents between ages 12-29 use the computer devices more than any other age-group.
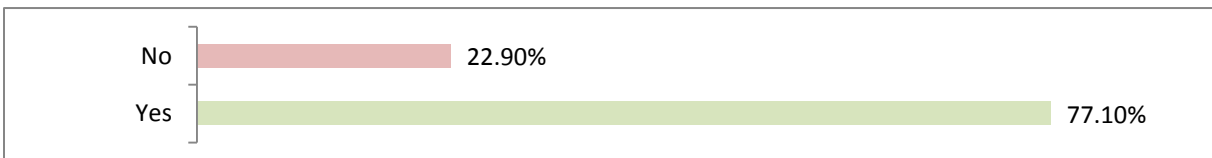
Figure 85:   Users of Computers {desktop/laptop/tablets} (% of all 3000 respondents)

Figure 86:   Users of Computers {desktop/laptop/tablets}: Nationality-wise
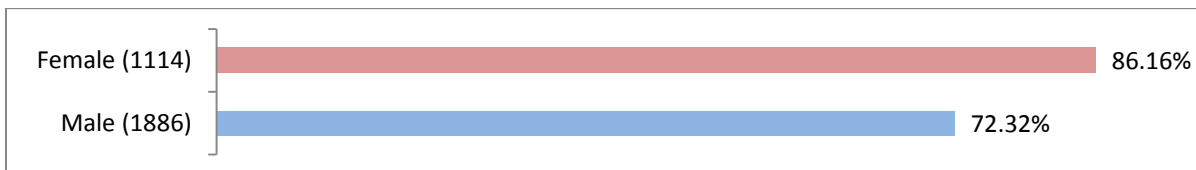
Figure 87:   Users of Computers {desktop/laptop/tablets}: Gender-wise
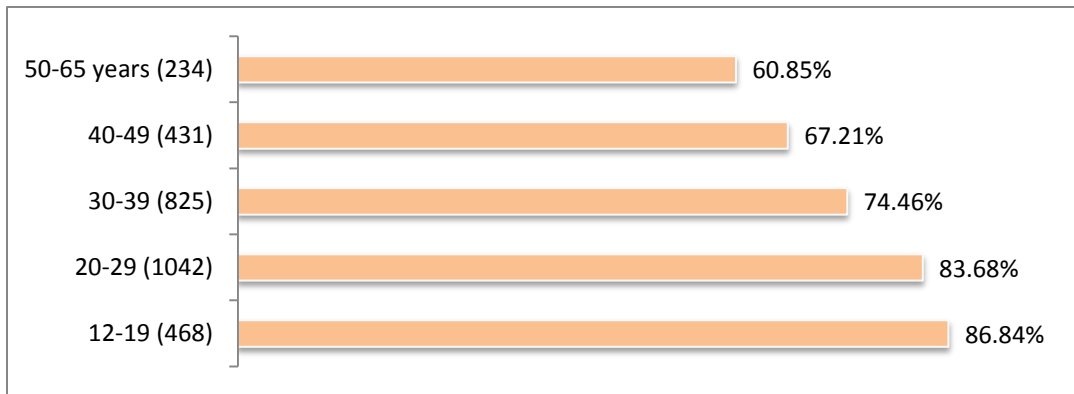
Figure 88:   Users of Computers {desktop/laptop/tablets}: Age-Group
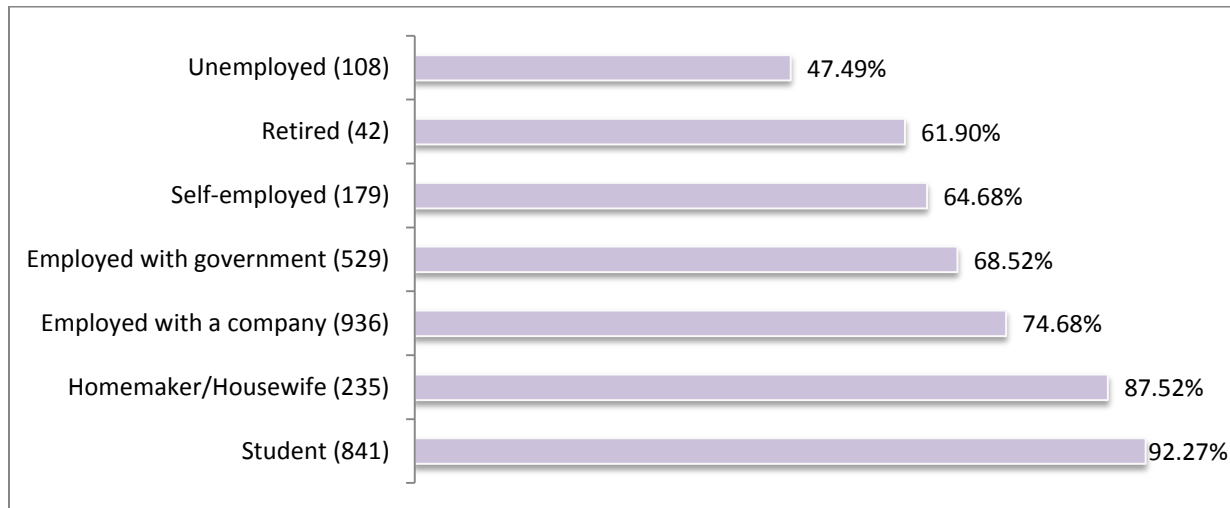
Figure 89:   Users of Computers {desktop/laptop/tablets}: Employment-wise
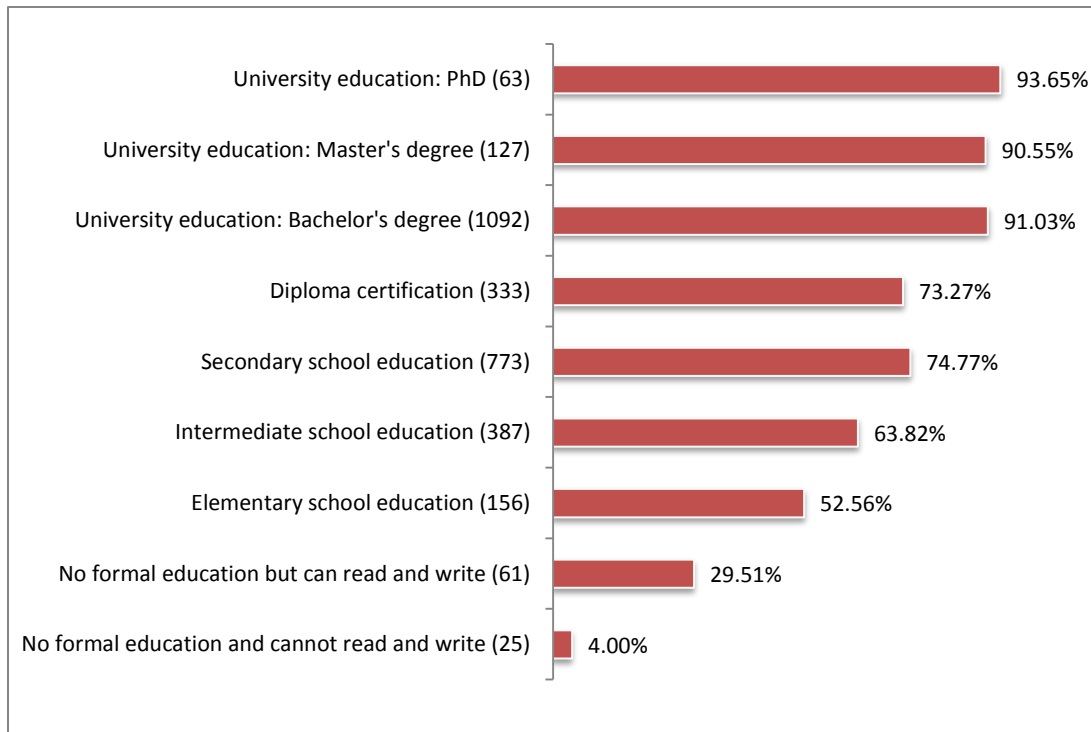
Figure 90:   Users of Computers {desktop/laptop/tablets}: Education-wise

Do you own or use any of the following devices?

Figure 91 depicts the percentages of users who own or use the electronic devices such as desktop, laptop and tablet while Figure 92 shows the similar results for smartphone, gaming consoles and other devices (e.g. SmartTV). Figure 93 and Figure 94 show the information on users who own or use 1 or more tablets and smartphones respectively.
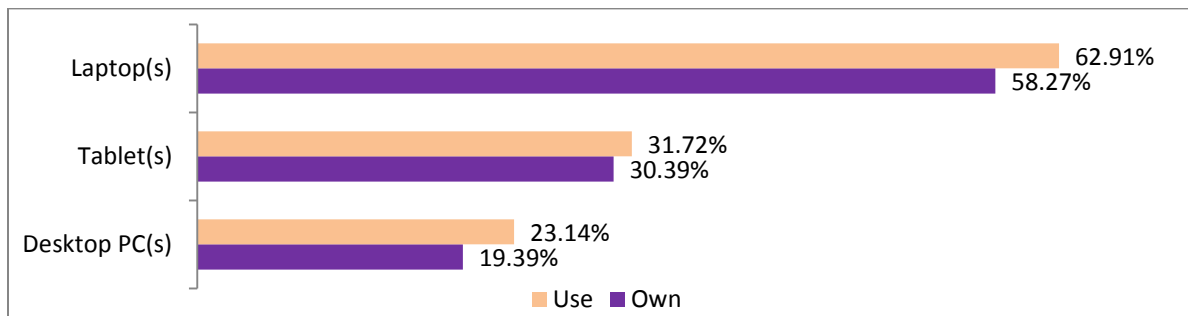
Figure 91:   Owner vs. Users of Computers {desktop/laptop/tablets} (% of all 3000 respondents)

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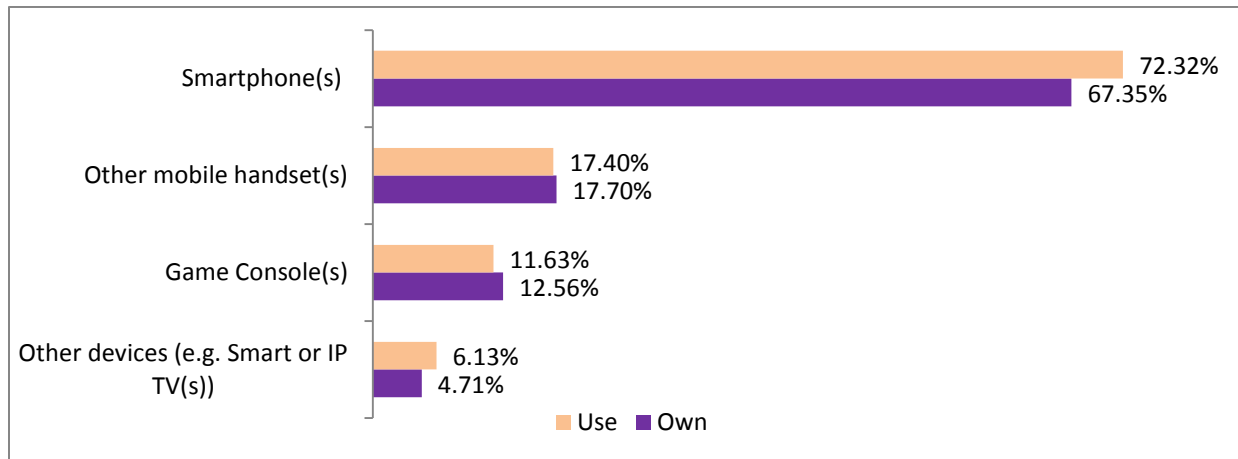
Figure 92: **Owner vs. Users of Devices (% of all 3000 respondents)**
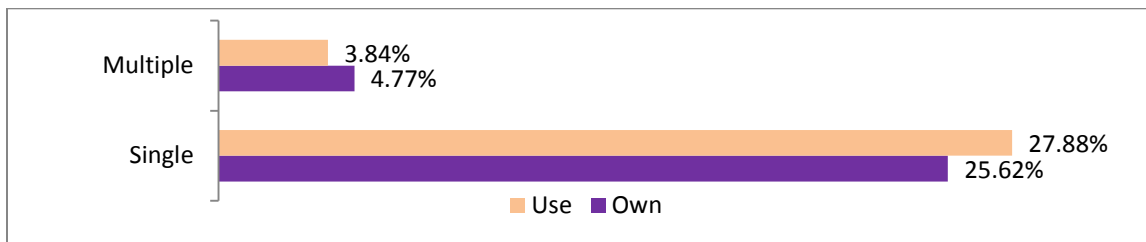
Figure 93: **Number of Tablets Owned or Used (% of all 3000 respondents)**
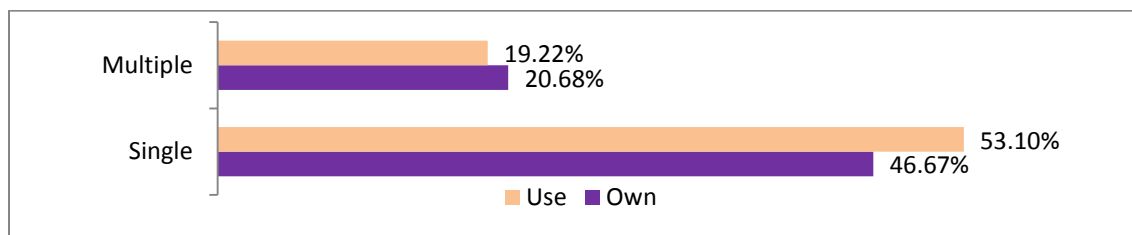
Figure 94: **Number of Smartphones Owned or Used (% of all 3000 respondents)**

Which is your preferred language for the following?

Figures below show the users preferences regarding the use of language for OS, Web, and other contents (such as Files etc.).
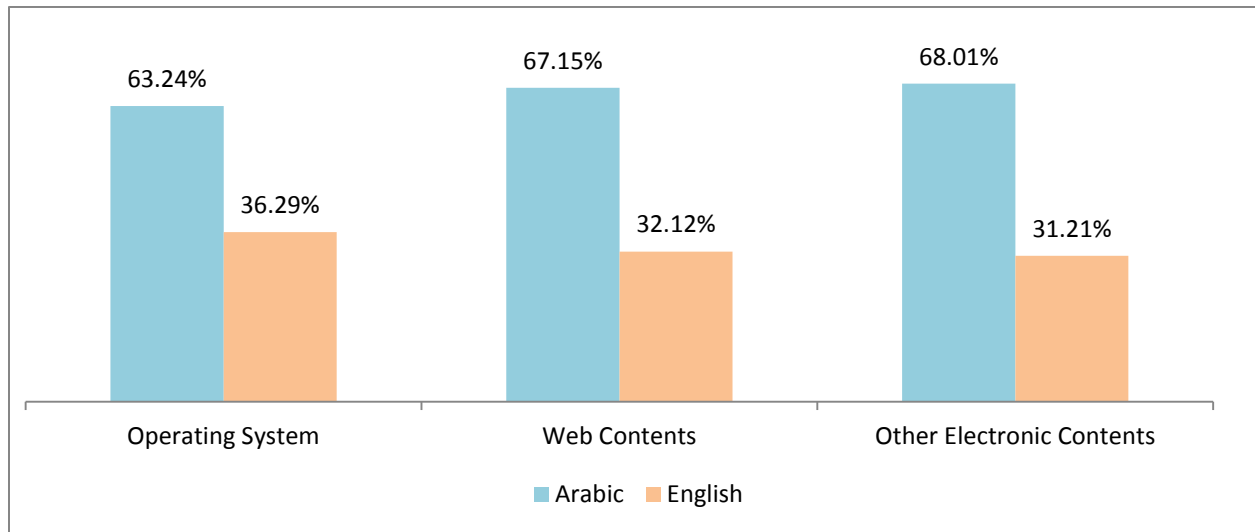
Figure 95: **Users' Preferred Languages (Total Users – 2313)**[42]
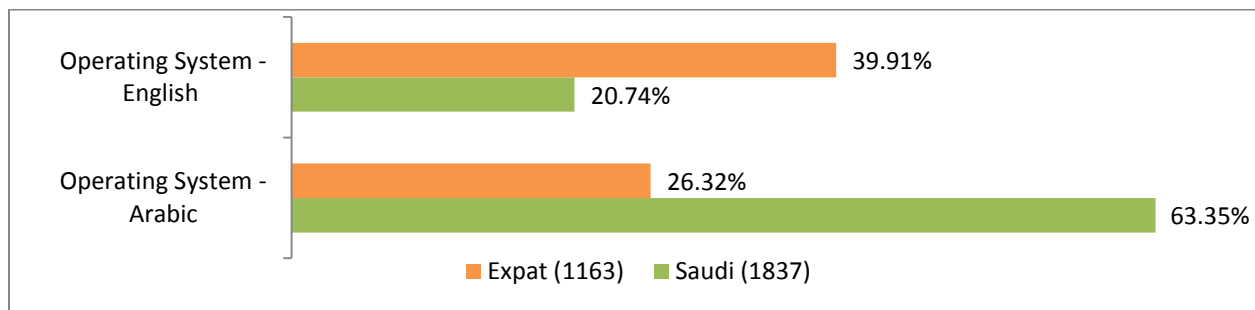
Figure 96: **Users' Preferred Languages for Operating System: Nationality-wise**[43]
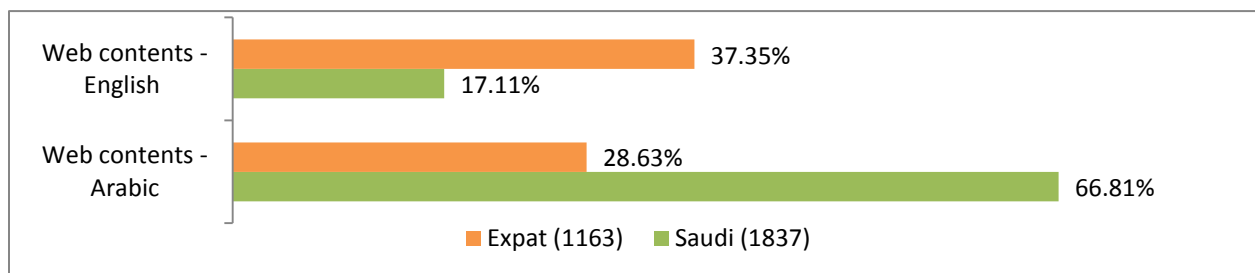
Figure 97: **Users' Preferred Languages for Web contents: Nationality-wise**[44]

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[42] Less than 1% respondents answered "Other Languages" not shown.

[43] Less than 1% respondents answered "Other Languages" not shown.

[44] Less than 1% respondents answered "Other Languages" not shown.
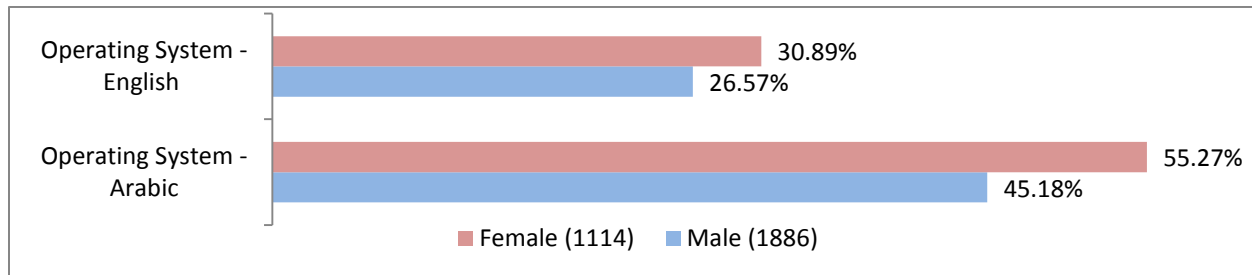
Figure 98:   Users' Preferred Languages for Operating System: Gender-wise[45]
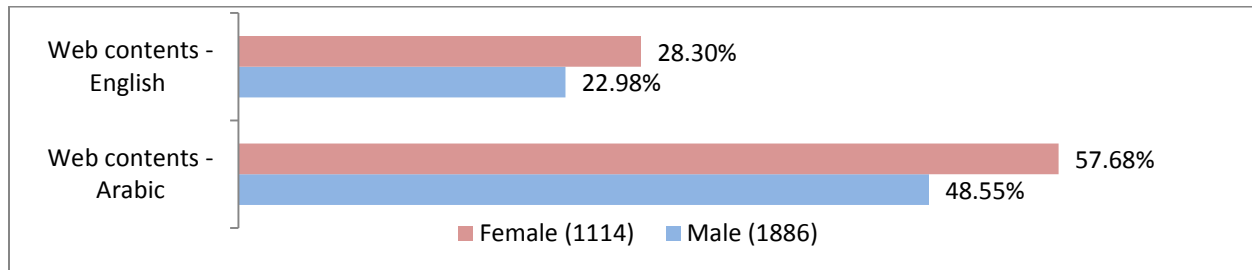
Figure 99:   Users' Preferred Languages for Web contents: Gender-wise[46]

11.2   Reasons for not using Computers {desktop/laptop/tablets}

What are your reasons for not using computer device {desktop/laptop/tablets}? (Multiple Choice)

Nearly 47% of respondents who don't use computers mentioned that they don't need computer devices (desktop/laptop/tablets).
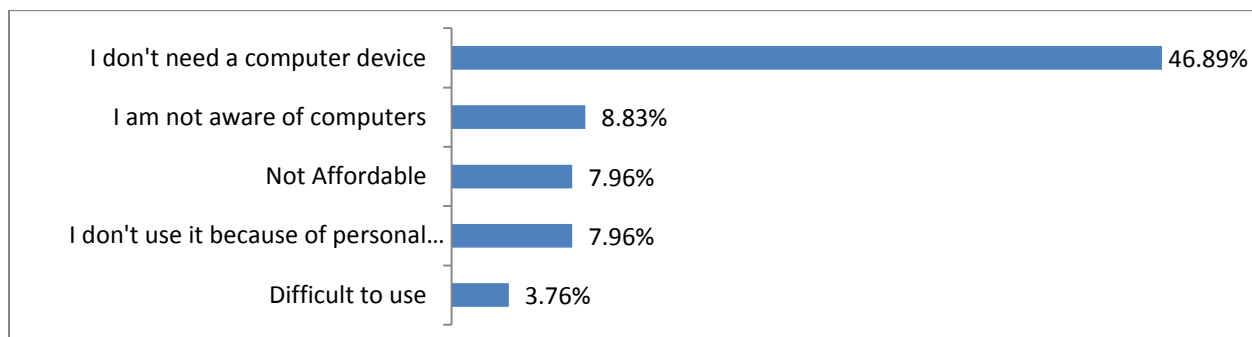
Figure 100:   Reasons for not using Computers {desktop/laptop/tablets} (Total non-users – 687)[47]

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[45] Less than 1% respondents answered "Other Languages" not shown.
[46] Less than 1% respondents answered "Other Languages" not shown.

11.3 List of Activities done using Computers {desktop/laptop/tablets}

For which of the following activities do you use computer device(s) {desktop/laptop/tablets}? (Multiple Choice)

Figure 101 identifies the list of activities which users usually do when using Computer Devices (Desktop, Laptop and Tablet). Figure 102 through Figure 107 show the activity patterns according to nationality, gender, age-group, employment type, education level and marital status respectively.

Figure 101:   List of Activities done using Computers (Total Users – 2313)
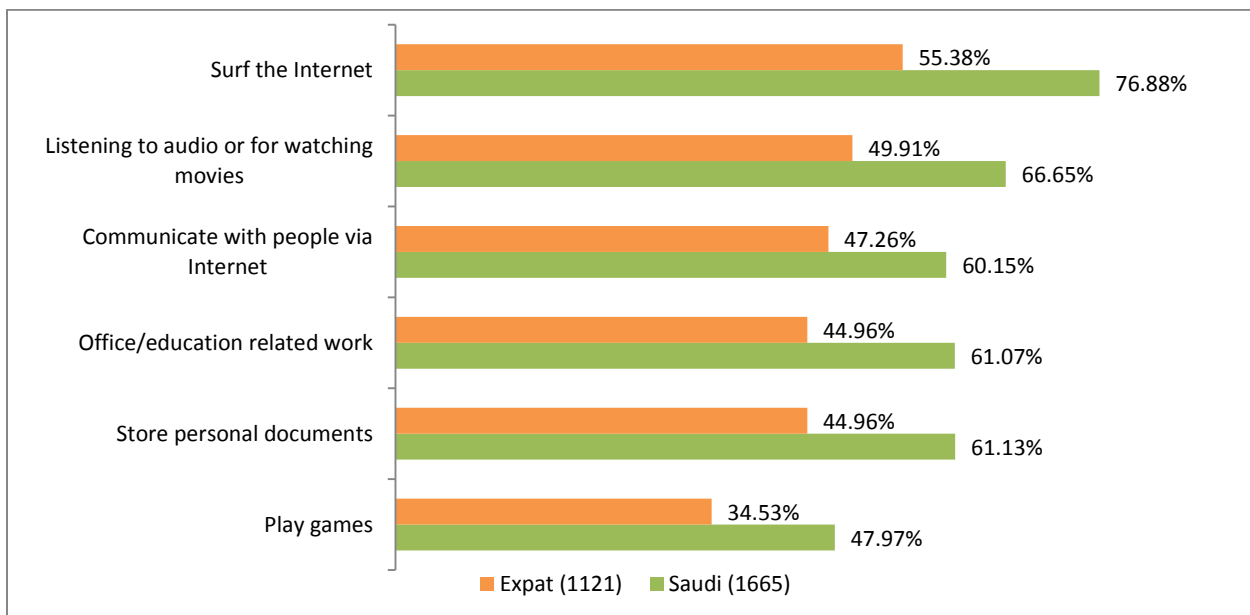
Figure 102:   List of Activities done using Computers: Nationality-wise

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[47] 37.34% of the respondents who answered "Others" not shown.

Figure 103: **List of Activities done using Computers: Gender-wise**

	Play games	Store personal documents	Office/education related work	Communicate with people via Internet	Listening to audio or for watching movies	Surf the Internet
50-65 years (216)	17.87%	41.70%	35.74%	33.62%	34.47%	45.96%
40-49 (391)	27.25%	46.19%	42.26%	43.65%	44.57%	56.12%
30-39 (753)	37.11%	53.49%	53.01%	53.49%	56.14%	66.51%
20-29 (969)	49.52%	66.32%	63.74%	66.60%	69.85%	77.58%
12-19 (456)	64.54%	46.71%	59.24%	53.72%	73.04%	74.52%
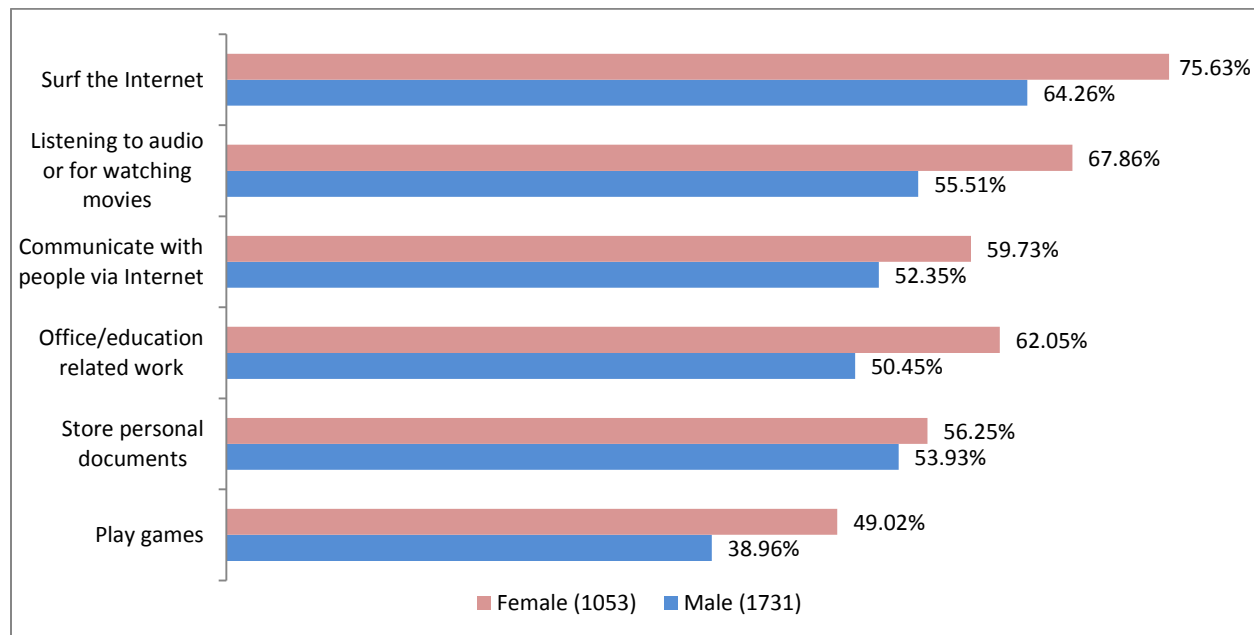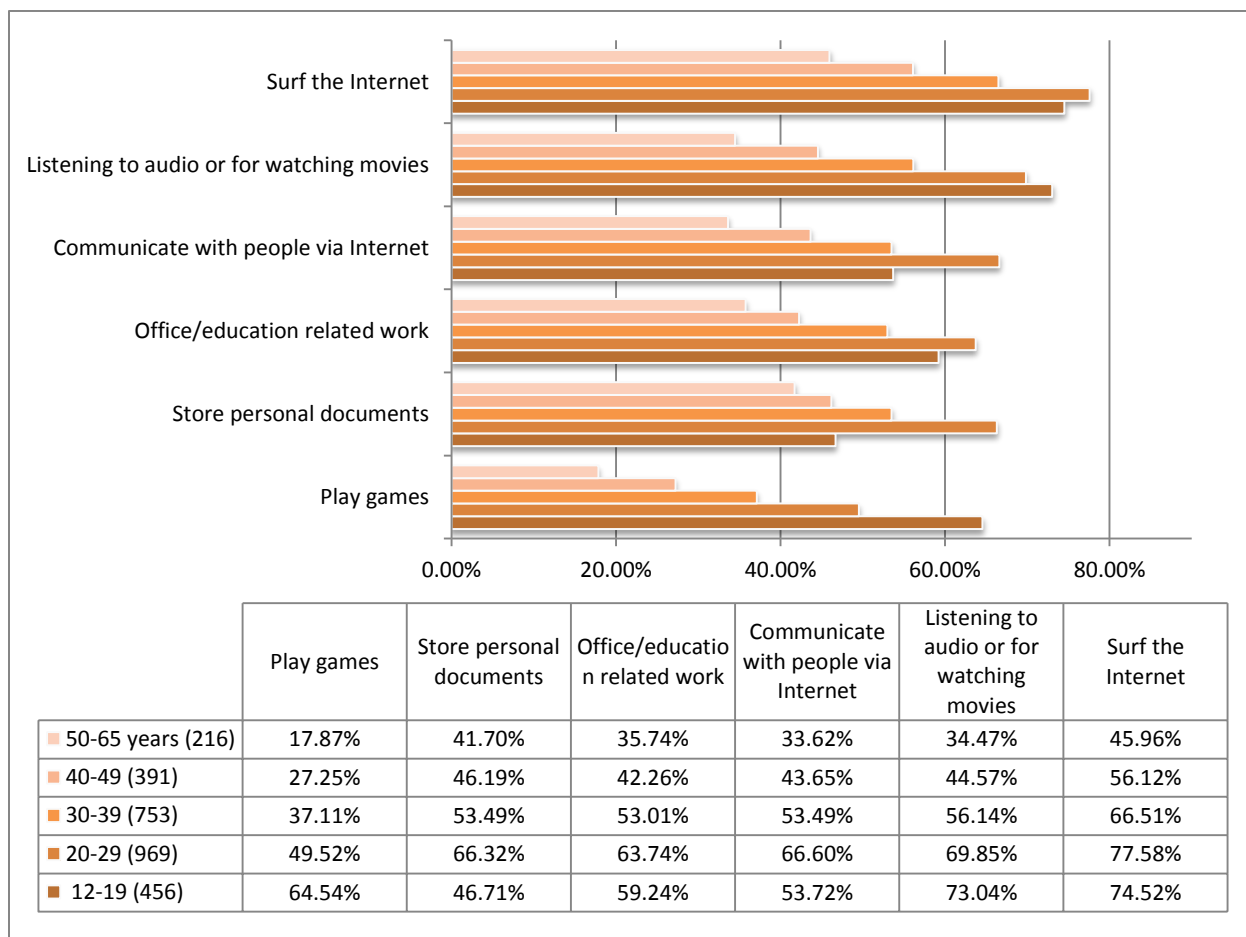
Figure 104:   List of Activities done using Computers: Age-Group

	Play games	Store personal documents	Office/educ ation related work	Communica te with people via Internet	Listening to audio or for watching movies	Surf the Internet
▪ Unemployed (86)	40.74%	47.22%	43.52%	44.44%	53.70%	60.19%
▪ Retired (42)	11.90%	40.48%	28.57%	30.95%	40.48%	42.86%
▪ Self-employed (151)	18.99%	30.73%	26.82%	19.55%	27.37%	41.90%
▪ Employed with government (520)	33.84%	70.13%	62.95%	64.65%	65.97%	78.64%
▪ Employed with a company (820)	41.99%	54.70%	52.56%	55.98%	56.09%	65.92%
▪ Homemaker/Housewife (224)	26.81%	34.89%	35.32%	38.72%	46.38%	49.79%
▪ Student (812)	63.38%	62.07%	70.51%	67.06%	79.07%	83.71%

Figure 105:   List of Activities done using Computers: Employment-use

	Play games	Store personal documents	Office/edu cation related work	Communic ate with people via Internet	Listening to audio or for watching movies	Surf the Internet
■ University education: PhD (63)	26.98%	79.37%	71.43%	77.78%	66.67%	79.37%
■ University education: Master's degree (128)	43.31%	76.38%	71.65%	77.95%	63.78%	84.25%
■ University education: Bachelor's degree (1073)	45.33%	69.96%	71.98%	71.70%	73.17%	82.51%
■ Diploma certification (290)	42.04%	55.26%	48.05%	52.55%	55.56%	67.57%
■ Secondary school education (667)	45.28%	48.64%	45.80%	49.29%	57.57%	65.98%
■ Intermediate school education (340)	41.34%	36.43%	39.28%	34.11%	48.84%	51.94%
■ Elementary school education (142)	37.82%	17.95%	32.05%	21.15%	37.82%	35.90%
■ No formal education but can read and write (58)	22.95%	22.95%	22.95%	18.03%	22.95%	26.23%
■ No formal education and cannot read and write (24)	4.00%	4.00%	4.00%	4.00%	4.00%	4.00%

Figure 106:   List of Activities done using Computers: Education-wise
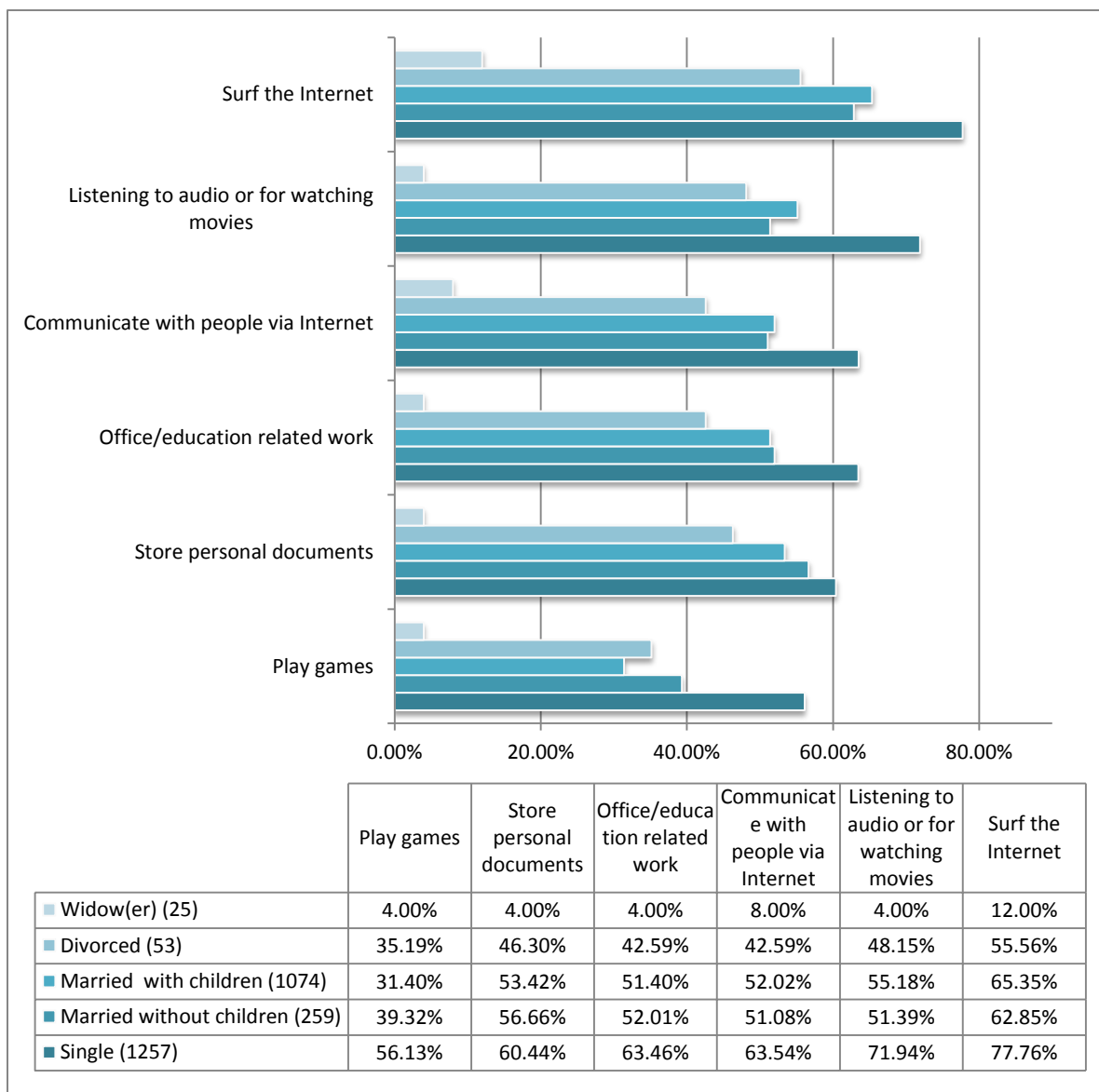
Figure 107:   List of Activities done using Computers: Marital-wise

	Play games	Store personal documents	Office/education related work	Communicate with people via Internet	Listening to audio or for watching movies	Surf the Internet
Widow(er) (25)	4.00%	4.00%	4.00%	8.00%	4.00%	12.00%
Divorced (53)	35.19%	46.30%	42.59%	42.59%	48.15%	55.56%
Married with children (1074)	31.40%	53.42%	51.40%	52.02%	55.18%	65.35%
Married without children (259)	39.32%	56.66%	52.01%	51.08%	51.39%	62.85%
Single (1257)	56.13%	60.44%	63.46%	63.54%	71.94%	77.76%

11.4 Frequency of Changing Mobile Handsets

How often do you change your mobile handset(s) (including smartphone(s))? (Single Choice)

Nearly 32.71% of users who owned mobile handsets including smartphones change their handsets in 1-2 years.
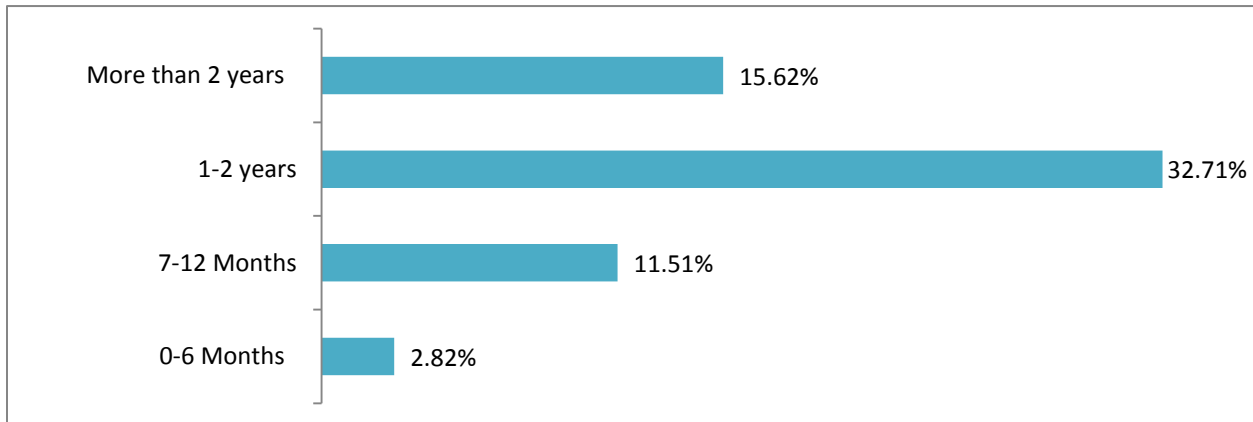
Figure 108:   Frequency of changing Mobile Handsets (Total Users 2313) [48]

Figure 109 through Figure 112 show the trends of users changing mobile handsets over the period of time according to nationality, gender, age and income level respectively.
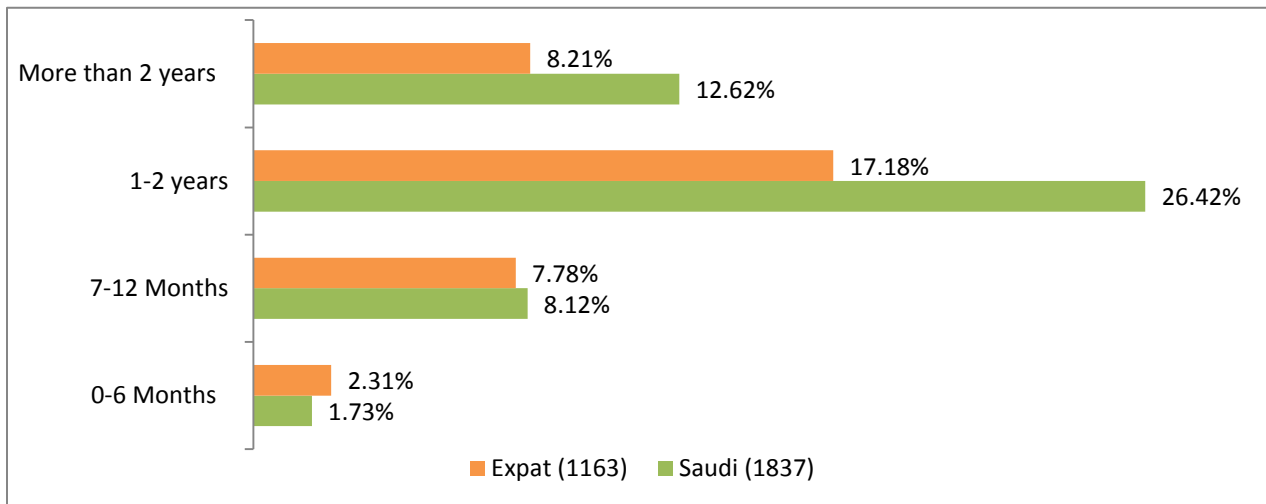
Figure 109:   Frequency of changing Mobile Handsets: Nationality-wise49

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[48] 37.34% users who answered 'I don't change unless necessary' not shown.
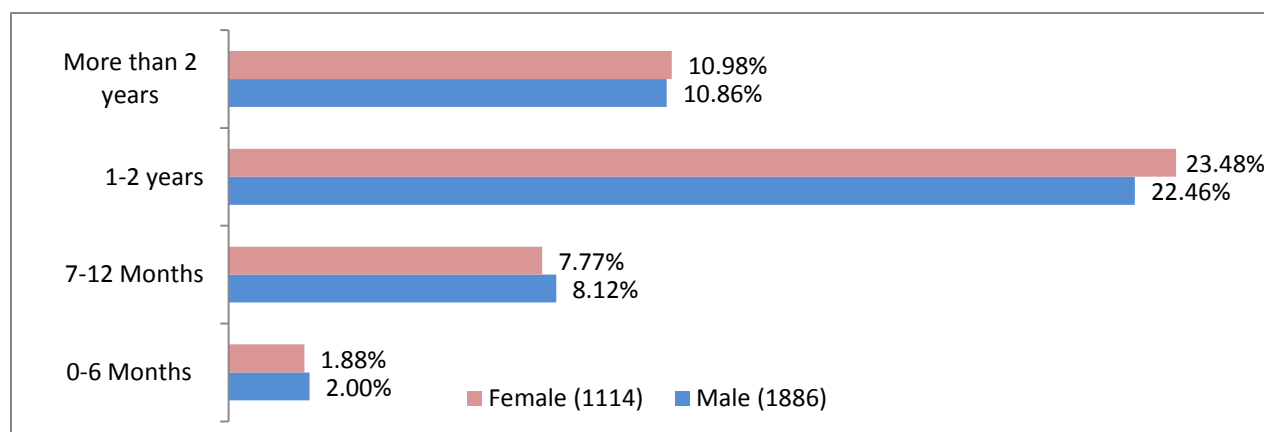
Figure 110:   Frequency of changing Mobile Handsets: Gender-wise[50]

	0-6 Months	7-12 Months	1-2 years	More than 2 years
50-65 years (234)	0.85%	3.83%	12.77%	8.94%
40-49 (431)	1.15%	4.85%	16.17%	10.62%
30-39 (825)	1.81%	7.59%	19.28%	13.61%
20-29 (1042)	2.86%	10.31%	29.96%	10.97%
12-19 (468)	1.49%	8.70%	24.42%	7.01%
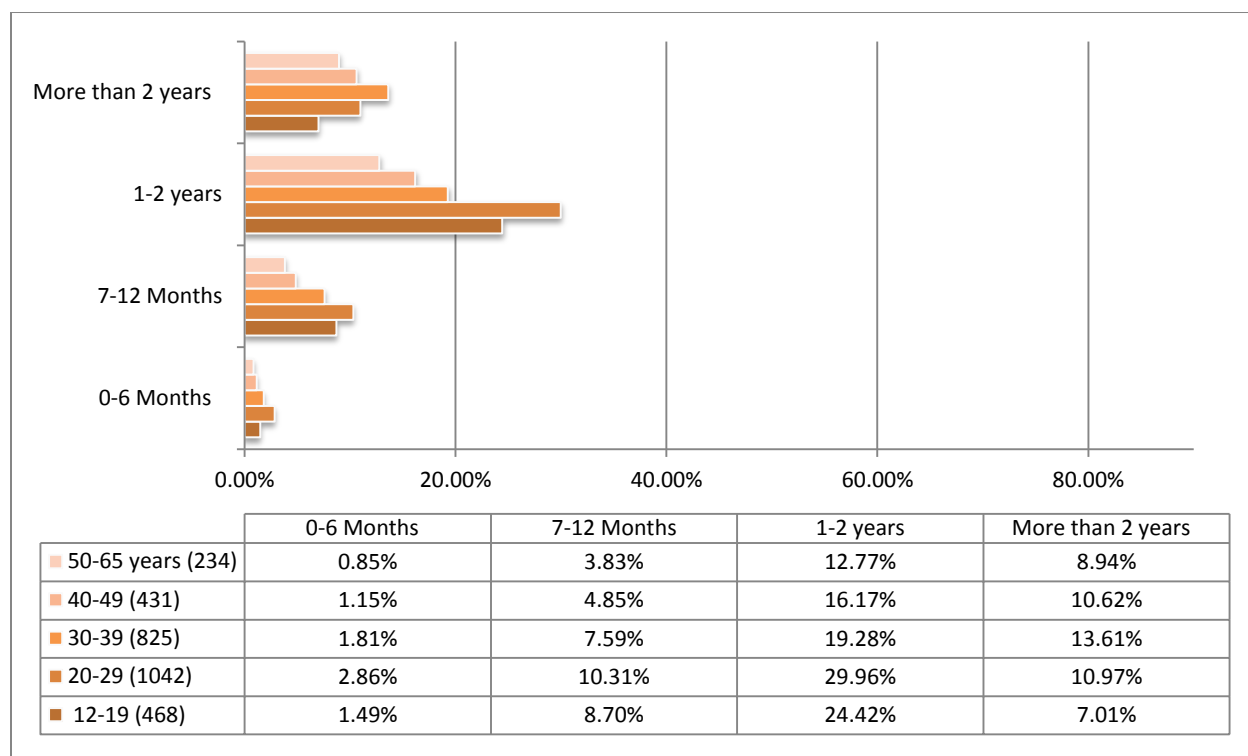
Figure 111:   Frequency of changing Mobile Handsets: Age-wise[51]

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[49] 27.50% of Saudis and 23.93% of Expats who answered 'I don't change unless necessary' not shown.

[50] 21.45% of males and 33.84% of females who answered 'I don't change unless necessary' not shown.

[51] Respondents who answered 'I don't change unless necessary' not shown.

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	0-6 Months	7-12 Months	1-2 years	More than 2 years
50,001 and above (13)	0.00%	7.69%	23.08%	38.46%
30,001-50,000 (13)	7.69%	0.00%	38.46%	15.38%
20,001-30,000 (39)	2.56%	5.13%	23.08%	10.26%
15,001-20,000 (110)	3.64%	12.73%	34.55%	14.55%
11,001-15,000 (205)	1.46%	10.24%	25.37%	21.95%
7,001-11,000 (345)	1.45%	9.28%	25.22%	13.62%
3,001-7,000 (636)	2.67%	10.22%	19.03%	8.96%
Less than SAR 3,000 (779)	1.80%	7.96%	25.80%	7.57%
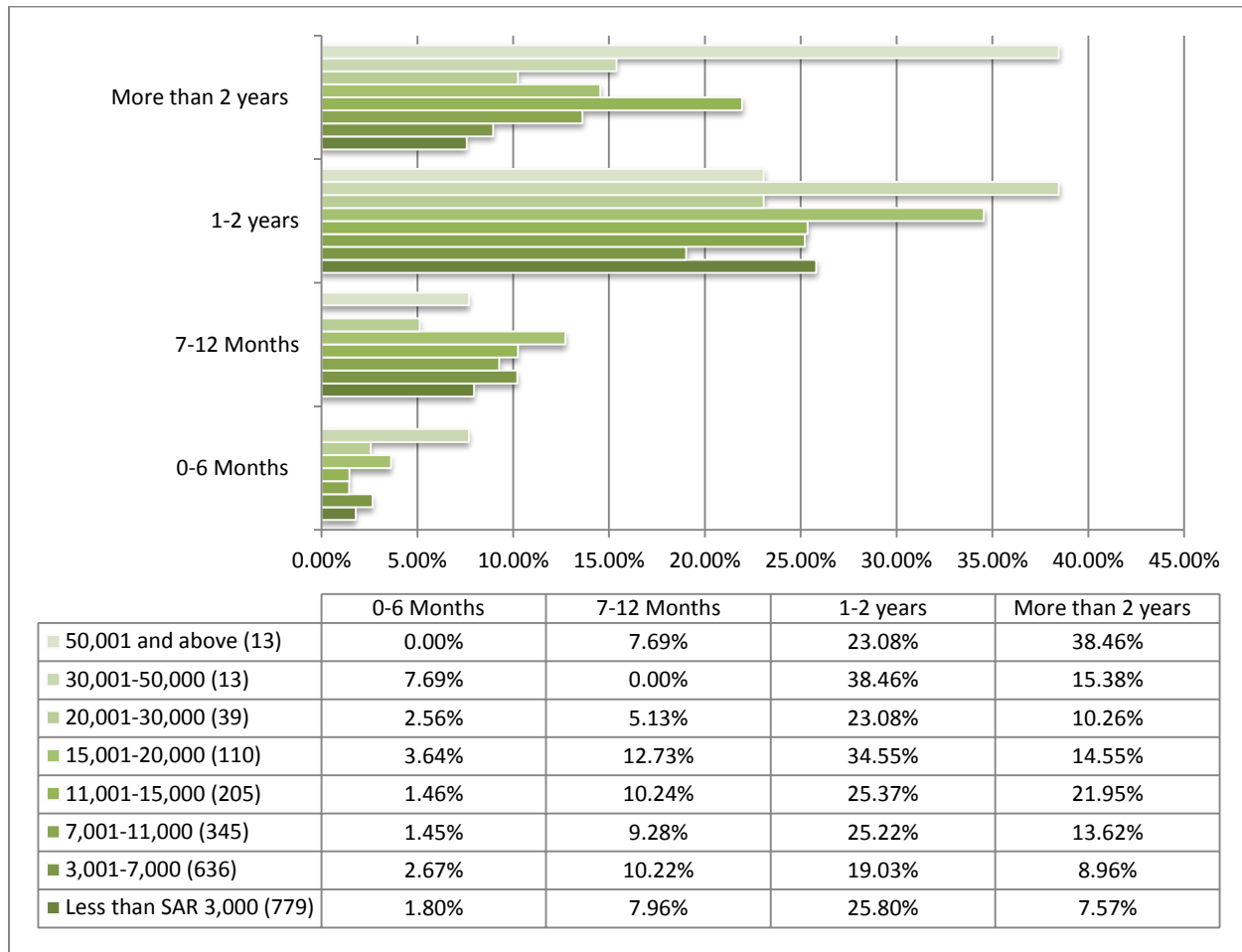
Figure 112: Frequency of changing Mobile Handsets: Monthly Income-wise[52]

11.5 Average Annual Spending on Mobile Handsets

How much do you spend yearly, on an average, on your mobile handset(s) (including smartphone(s))? (Single Choice)

Below figure shows the average annual spending of users on their mobile handsets including smartphone. It is found that on an average, users spend nearly SAR 1368/- on their mobile phones.

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[52] Respondents who answered 'I don't change unless necessary' not shown.
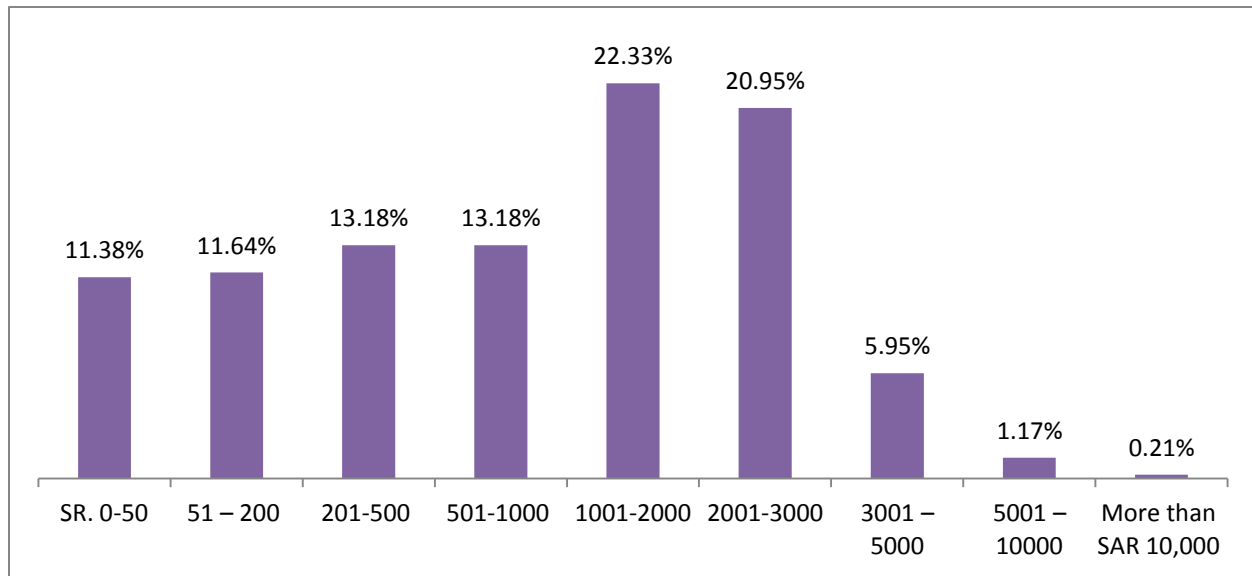
Figure 113: **Average Annual Spending on Mobile Handsets**[53]

11.6 Computer and Internet Household Users

Who in your family, currently living with you, uses a Computer device (desktop/laptop/tablet) and Internet? (Excluding servants/guests/members not living with you permanently)

Household heads were surveyed to provide information on Internet and Computer (desktop/laptop/tablet) usage for their household members for all age-ranges (including 0-12 and 65+). This was done to identify the Internet and Computer usage penetration per household.
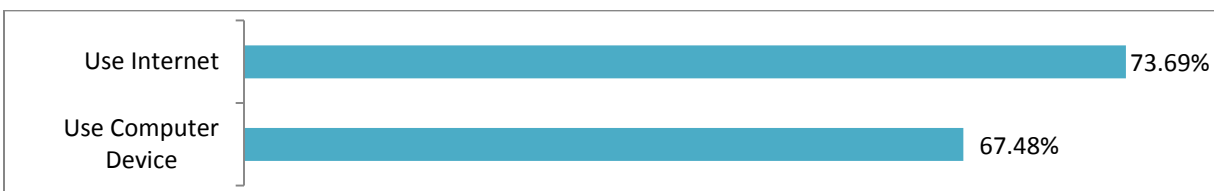
Figure 114: **Computer and Internet Household Users (% of 2125 household members excluding the Household Heads)**

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[53] 10.17% respondents who answered "I don't know" are not included in calculation.

12. Online Social Networking

12.1 Use of Online Social Networks

Figure 115 depicts that 90.79% of all respondents use online social networks.

| No | 9.21% |
| Yes | 90.79% |
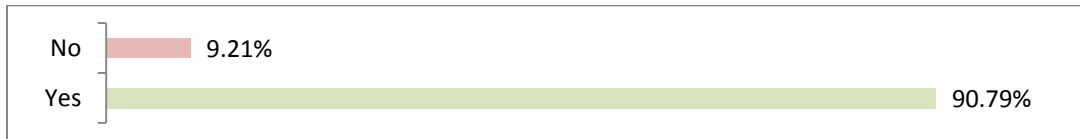
Figure 115: Users of online Social Networking (% of all 3000 respondents)

Figure 116 shows the usage of online social networks for Saudis and Expatriates. It is noted that more percentage of Saudis use online social networks than Expatriates.

No — 11.79% / 7.63%
Yes — 88.21% / 92.37%

■ Expat (1163)   ■ Saudi (1837)
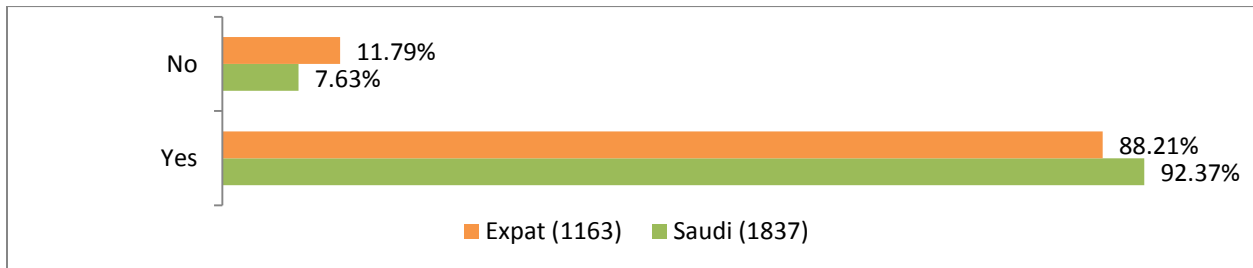
Figure 116: Users of online Social Networks: Nationality-wise

Figure 117 shows the users of online social networking according to the genders. It is revealed that both males and females use online social networks similarly.

No — 10.00% / 8.80%
Yes — 90.00% / 91.20%

■ Female (1114)   ■ Male (1886)
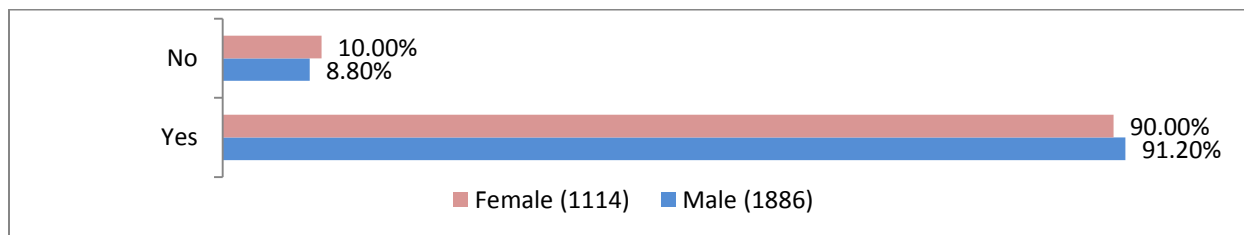
Figure 117: Users of online Social Networks: Gender-wise

Did you use any of the following online social networks in the last six (6) months? (Multiple Choice)

Only 9.21% of respondents do not use online social networking services/applications. It is observed that the top online social networking services/applications among the respondents are Youtube (69.77%), Facebook (59.40%), Twitter (53%) and Instagram (41.30%).
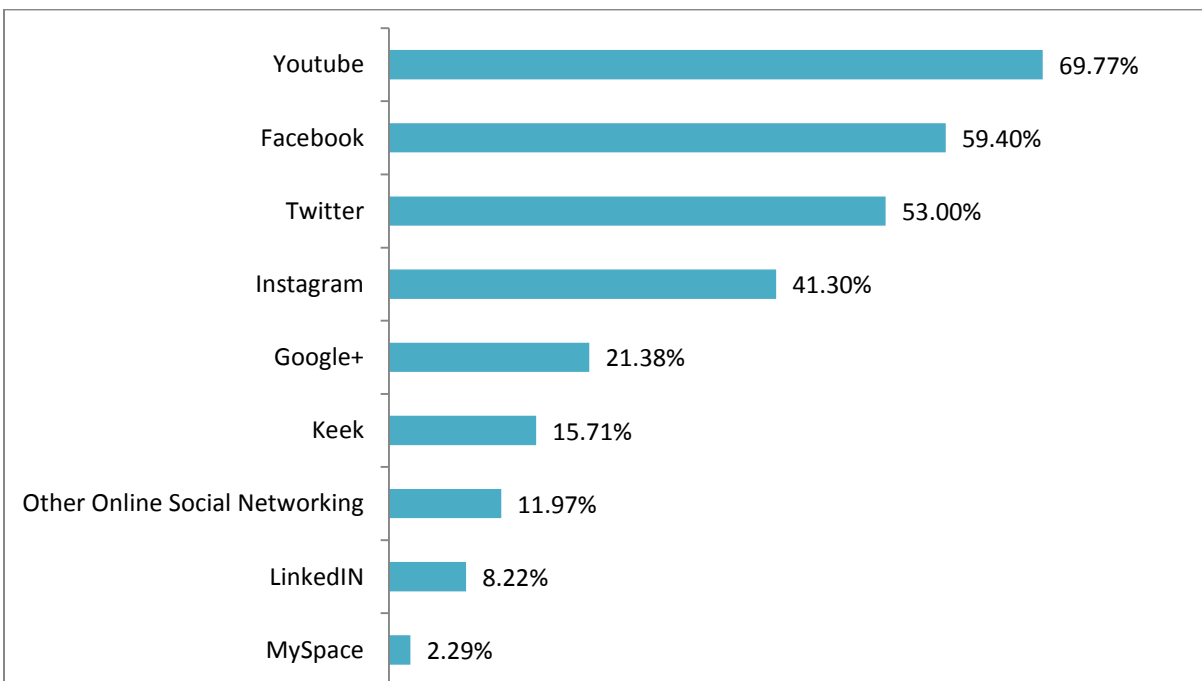
Figure 118:   Users distribution by Social Networks Sites (% of all 3000 respondents)

Figure 119 shows the users of Online Social Networking according to the nationalities.
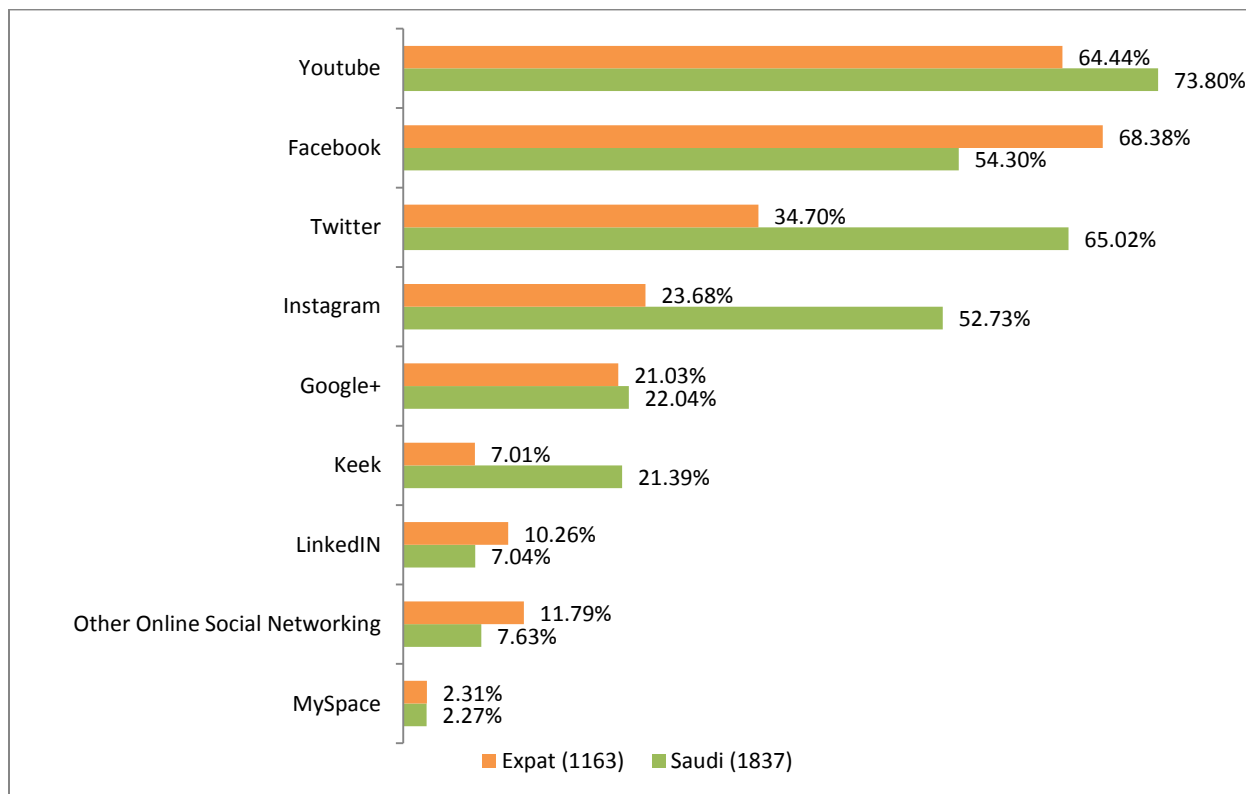
Figure 119:   Users distribution of Online Social Networks (sites): Nationality-wise

Figure 120 shows the users of Online Social Networking according to the genders.
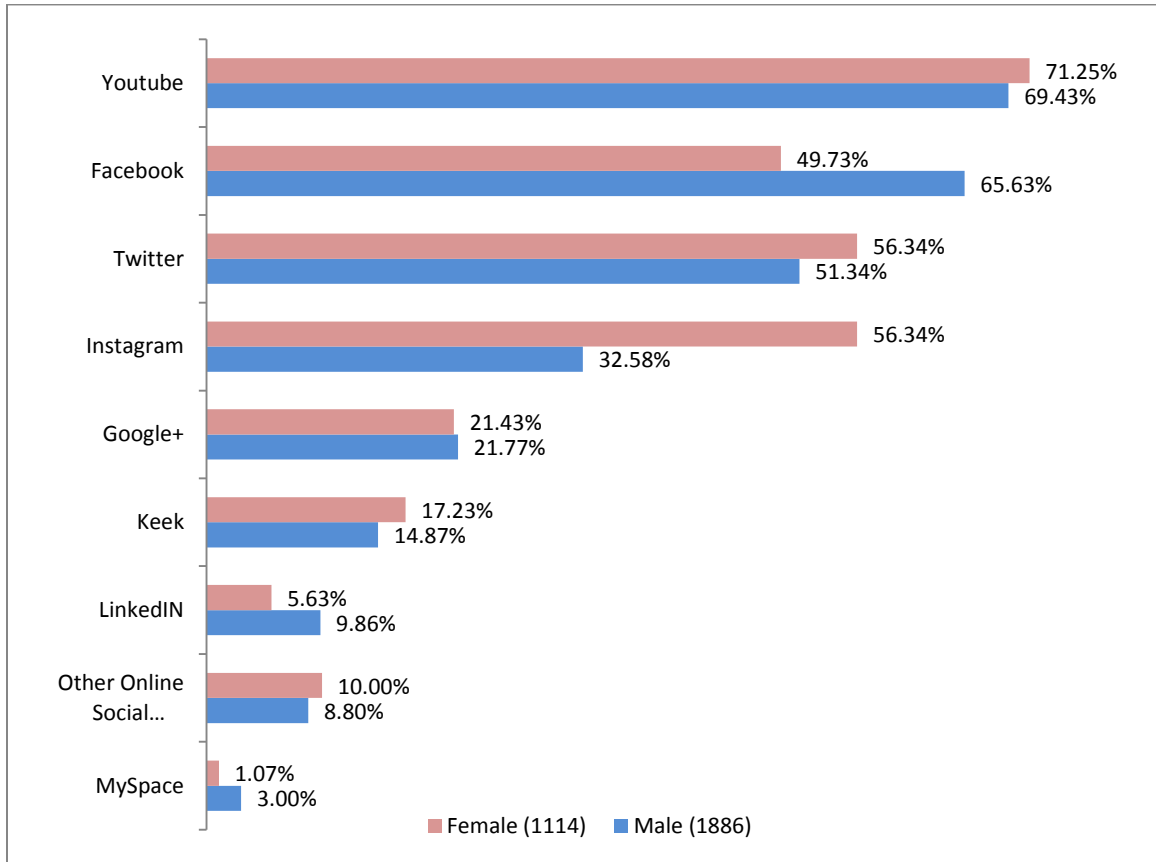
Figure 120:   Users distribution of Online Social Networks (sites): Gender-wise

Figure 121 shows the users of Online Social Networking according to the ages. It is interesting to note that users aged between 12-29 years use YouTube, Instagram and Keek more than any other users' age-group while those aged between 20-29 years use Facebook, Twitter, Google+ and LinkedIn more than any other age-group.

	MySpace	Other Online Social Networking	LinkedIN	Keek	Google+	Instagram	Twitter	Facebook	Youtube
50-65 years (234)	2.12%	26.98%	6.35%	2.65%	12.17%	14.81%	32.28%	43.39%	50.26%
40-49 (431)	2.77%	15.24%	6.47%	8.08%	18.48%	24.02%	39.95%	52.19%	56.81%
30-39 (825)	1.57%	7.71%	8.55%	12.29%	22.77%	32.89%	48.31%	63.25%	66.27%
20-29 (1042)	3.05%	5.15%	12.02%	20.42%	25.67%	53.53%	64.22%	66.03%	79.58%
12-19 (468)	1.70%	4.25%	2.55%	25.90%	19.11%	60.30%	62.42%	57.54%	80.25%
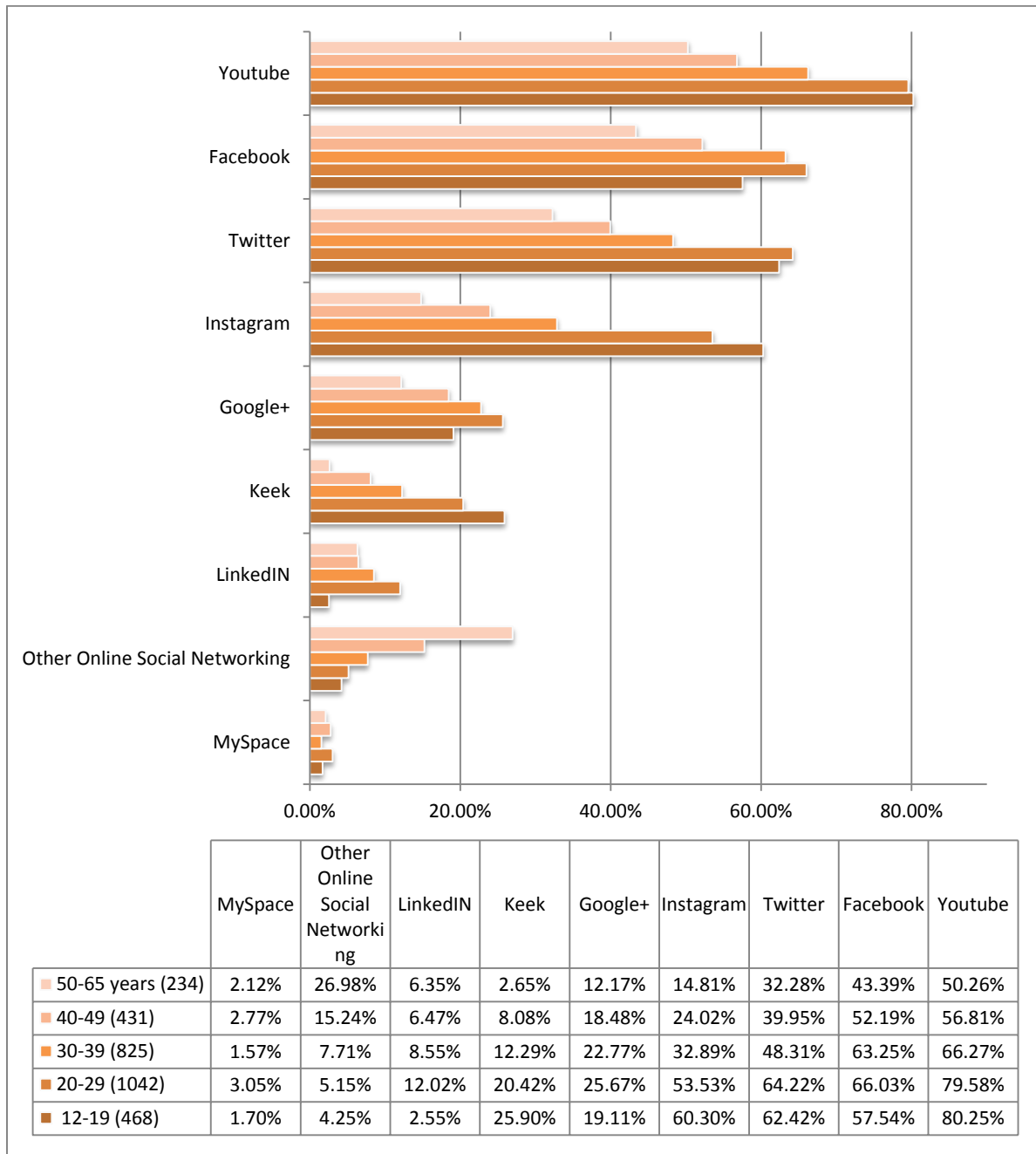
Figure 121:   Users distribution by Online Social Networks (sites): Age-Group

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Figure 122 shows the users of Online Social Networking according to the employment type.

	MySpace	Other Online Social Networking	LinkedIN	Keek	Google+	Instagram	Twitter	Facebook	Youtube
Unemployed (108)	0.93%	18.52%	7.41%	13.89%	18.52%	37.96%	50.93%	46.30%	52.78%
Retired (42)	0.00%	28.57%	0.00%	7.14%	4.76%	19.05%	28.57%	28.57%	40.48%
Self-employed (179)	4.47%	15.64%	7.26%	4.47%	12.29%	22.35%	33.52%	47.49%	41.90%
Employed with government (529)	2.08%	6.81%	6.81%	17.20%	25.52%	36.86%	59.55%	53.88%	74.29%
Employed with a company (936)	2.88%	9.83%	13.68%	11.22%	23.61%	30.02%	47.01%	75.21%	71.90%
Homemaker/Housewife (235)	1.28%	23.83%	1.70%	10.21%	14.47%	40.85%	35.32%	40.43%	61.70%
Student (841)	1.66%	3.33%	6.66%	26.63%	23.42%	66.47%	69.68%	60.05%	83.12%

Figure 122:   Users distribution by Online Social Networks (sites):: Employment-wise

12.2   Frequency of Use of Online Social Networking
How often do you use online social networking? (Single Choice)

It is observed that 65.74% of users spend 2 or more hours daily on social networking sites, and out of all social networking users nearly 16.17% of them spend more than 8 hours a day on these sites. Here it should be noted that getting connected to and staying connected with any Online Social Network is considered as usage of Online Social Networking.
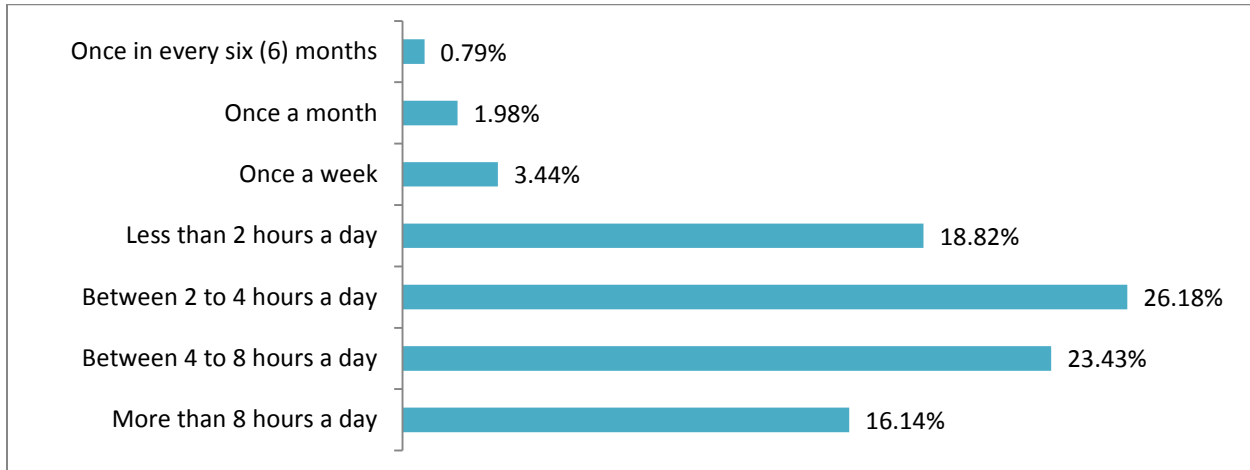
Figure 123:   Frequency of use of Online Social Networks (% of all 3000 respondents)

Figure 124 shows the usage pattern of different nationalities on social networking sites.
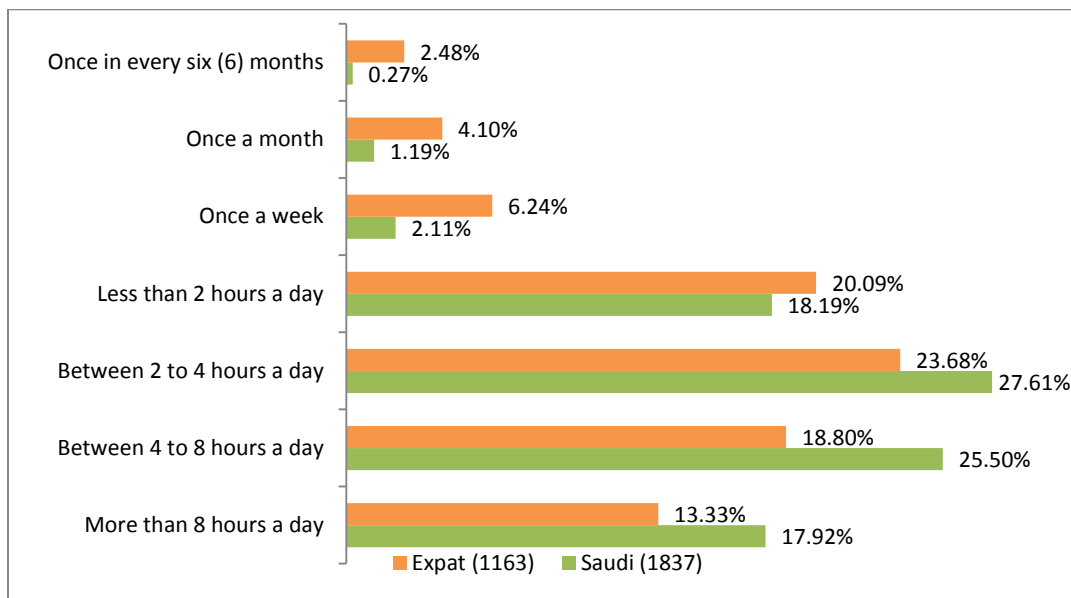
Figure 124:   Frequency of use of Online Social Networks: Nationality-wise

Figure 125 shows the usage pattern of different genders on social networking sites.

Frequency	Female (1114)	Male (1886)
Once in every six (6) months	0.18%	1.69%
Once a month	0.45%	3.43%
Once a week	1.79%	4.85%
Less than 2 hours a day	16.70%	20.24%
Between 2 to 4 hours a day	23.48%	27.57%
Between 4 to 8 hours a day	23.66%	22.46%
More than 8 hours a day	24.20%	11.33%
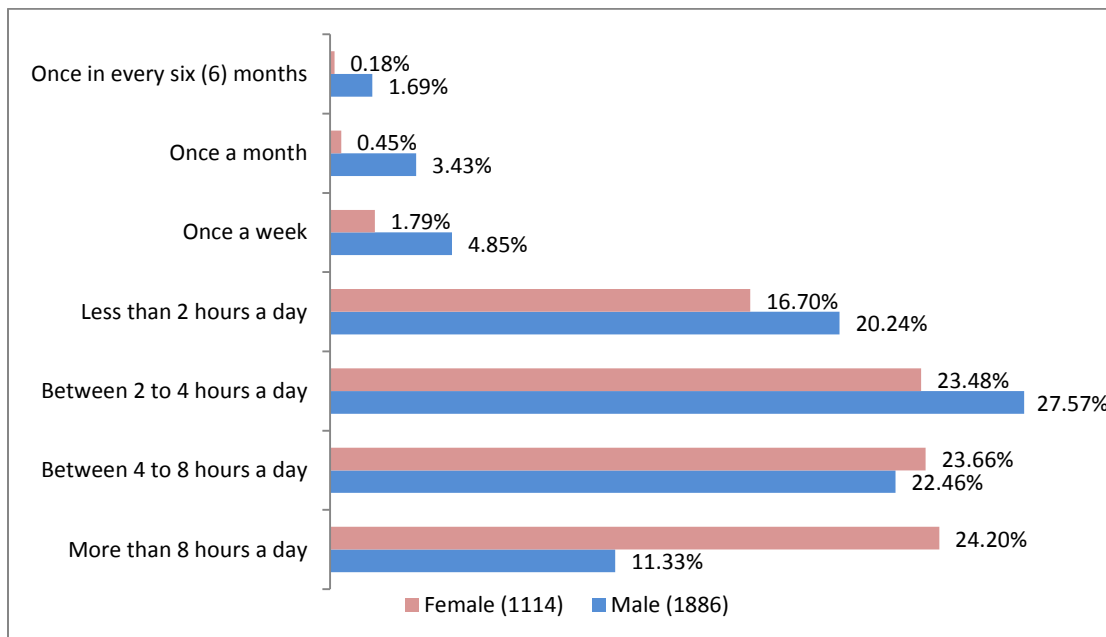
Figure 125:   Frequency of use of Online Social Networks: Gender-wise

Figure 126 shows the usage pattern of respondents of different ages on social networking sites.

	More than 8 hours a day	Between 4 to 8 hours a day	Between 2 to 4 hours a day	Less than 2 hours a day	Once a week	Once a month	Once in every six (6) months
50-65 years (234)	6.38%	8.51%	19.15%	28.51%	3.40%	2.55%	1.28%
40-49 (431)	5.08%	15.24%	24.94%	26.10%	7.16%	3.70%	2.77%
30-39 (825)	10.84%	18.19%	30.84%	21.33%	5.06%	4.58%	1.57%
20-29 (1042)	21.56%	31.30%	25.76%	13.65%	1.91%	0.67%	0.57%
12-19 (468)	28.66%	26.96%	22.51%	15.07%	2.34%	0.64%	0.00%

Figure 126:   Frequency of use of Online Social Networks: Age-Group

Figure 127 shows the usage pattern of respondents of different employment types on social networking sites.

	More than 8 hours a day	Between 4 to 8 hours a day	Between 2 to 4 hours a day	Less than 2 hours a day	Once a week	Once a month	Once in every six (6) months
Unemployed (108)	13.89%	23.15%	25.93%	10.19%	3.70%	3.70%	1.85%
Retired (42)	9.52%	4.76%	14.29%	28.57%	4.76%	4.76%	4.76%
Self-employed (179)	17.88%	15.64%	16.20%	12.85%	8.94%	8.38%	4.47%
Employed with government (529)	7.18%	20.79%	29.87%	30.62%	2.84%	1.89%	0.38%
Employed with a company (936)	13.14%	22.12%	30.56%	18.80%	3.85%	1.39%	0.75%
Homemaker/Housewife (235)	9.36%	16.60%	22.98%	24.68%	1.28%	1.70%	0.00%
Student (841)	28.78%	30.08%	23.54%	12.49%	2.02%	0.24%	0.24%

Figure 127:   Frequency of use of Online Social Networks: Employment-wise

Figure 128 shows the usage pattern of respondents of different education background on social networking sites.

	More than 8 hours a day	Between 4 to 8 hours a day	Between 2 to 4 hours a day	Less than 2 hours a day	Once a week	Once a month	Once in every six (6) months
University education: PhD (63)	6.35%	12.70%	19.05%	46.03%	7.94%	1.59%	0.00%
University education: Master's degree (127)	9.45%	21.26%	33.86%	28.35%	1.57%	0.00%	0.00%
University education: Bachelor's degree (1092)	18.32%	25.18%	27.84%	20.15%	2.20%	1.01%	0.64%
Diploma certification (333)	11.41%	24.62%	26.13%	19.22%	5.71%	5.71%	0.90%
Secondary school education (773)	19.02%	25.49%	25.49%	14.23%	3.88%	2.07%	1.55%
Intermediate school education (387)	17.05%	19.12%	22.48%	19.38%	5.43%	3.88%	2.58%
Elementary school education (156)	11.54%	16.67%	21.79%	17.95%	4.49%	4.49%	1.28%
No formal education but can read and write (61)	3.28%	4.92%	31.15%	16.39%	4.92%	1.64%	0.00%
No formal education and cannot read and write (25)	0.00%	0.00%	8.00%	0.00%	4.00%	0.00%	0.00%

Figure 128:   Frequency of use of Online Social Networks: Education-wise

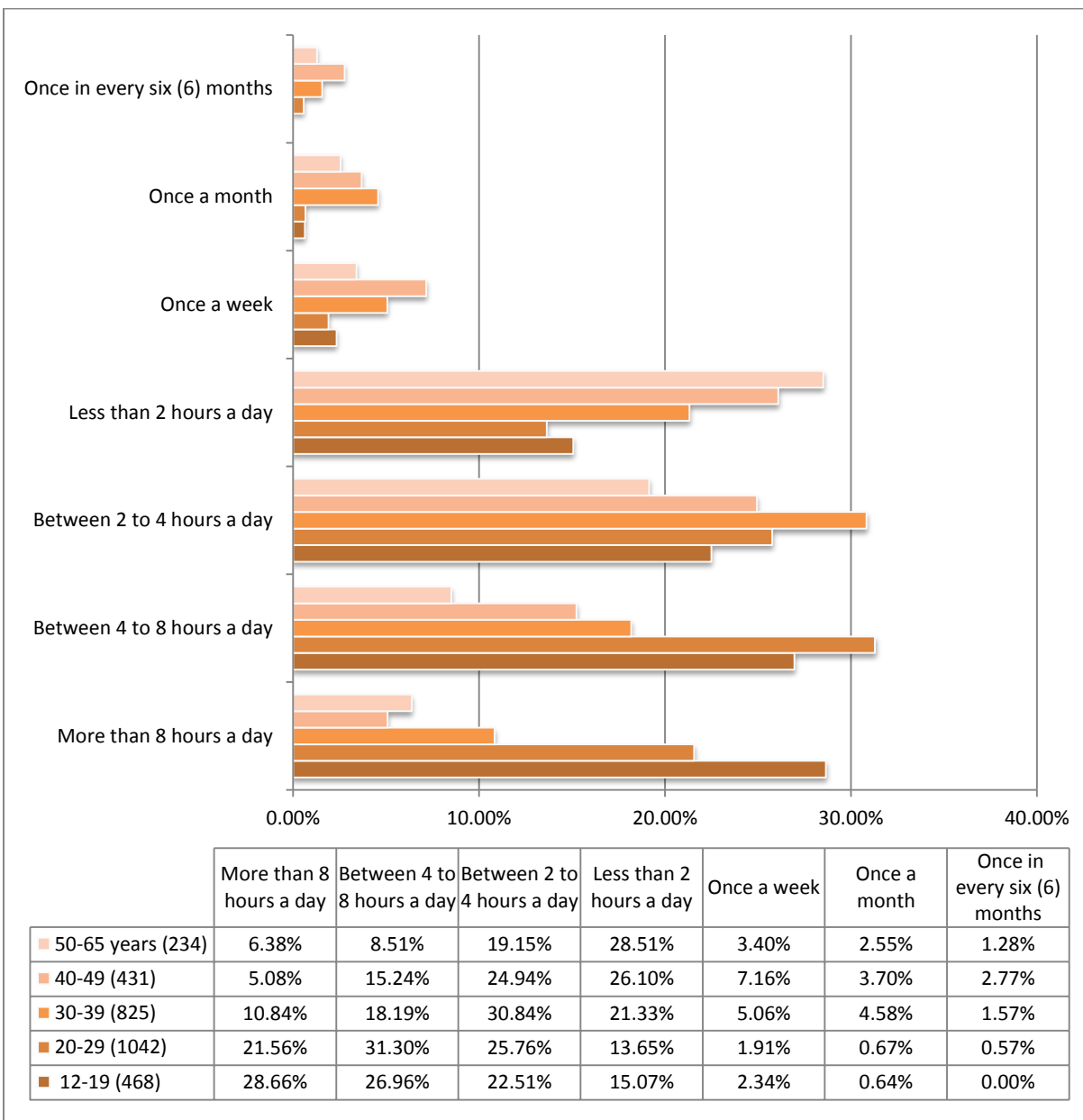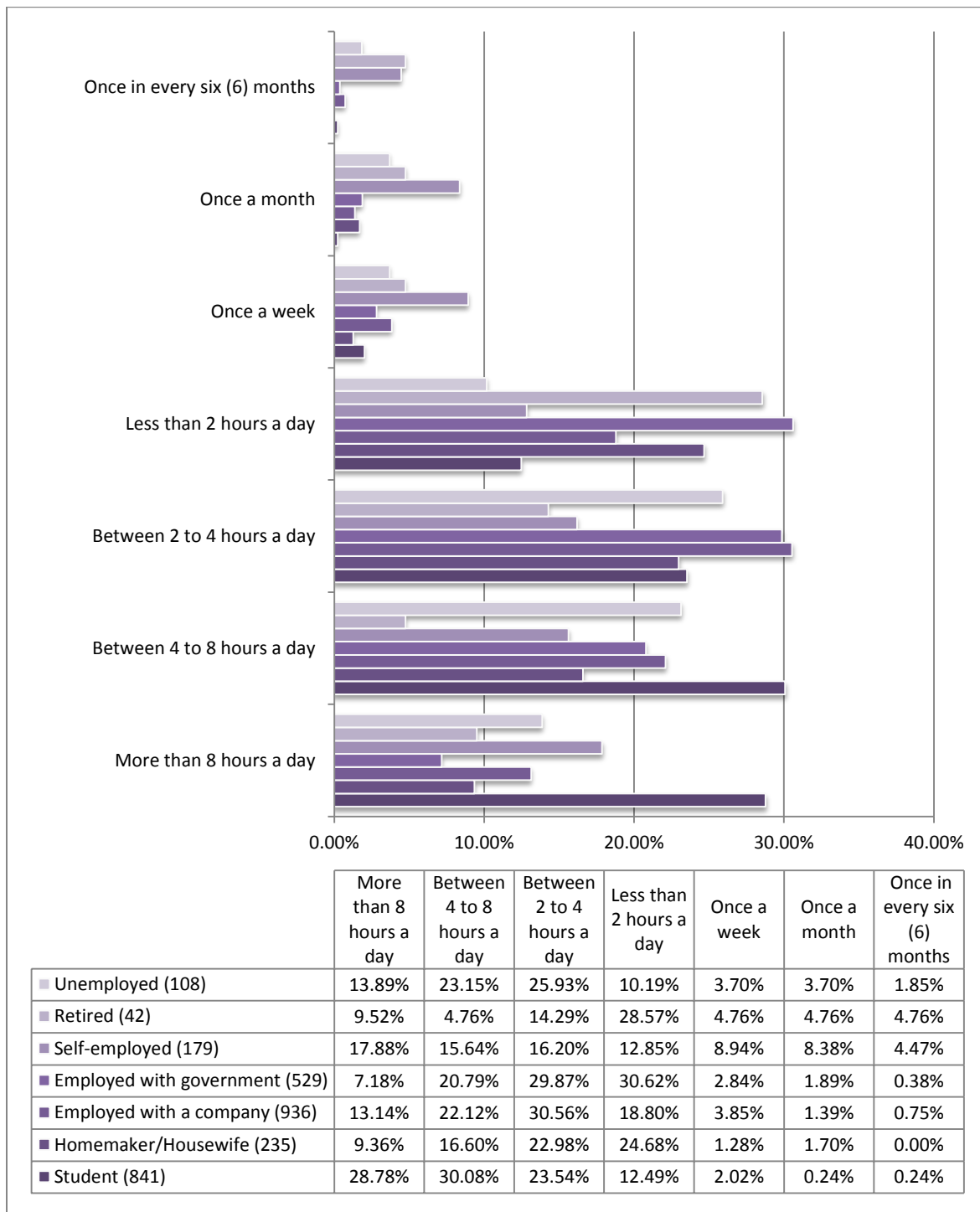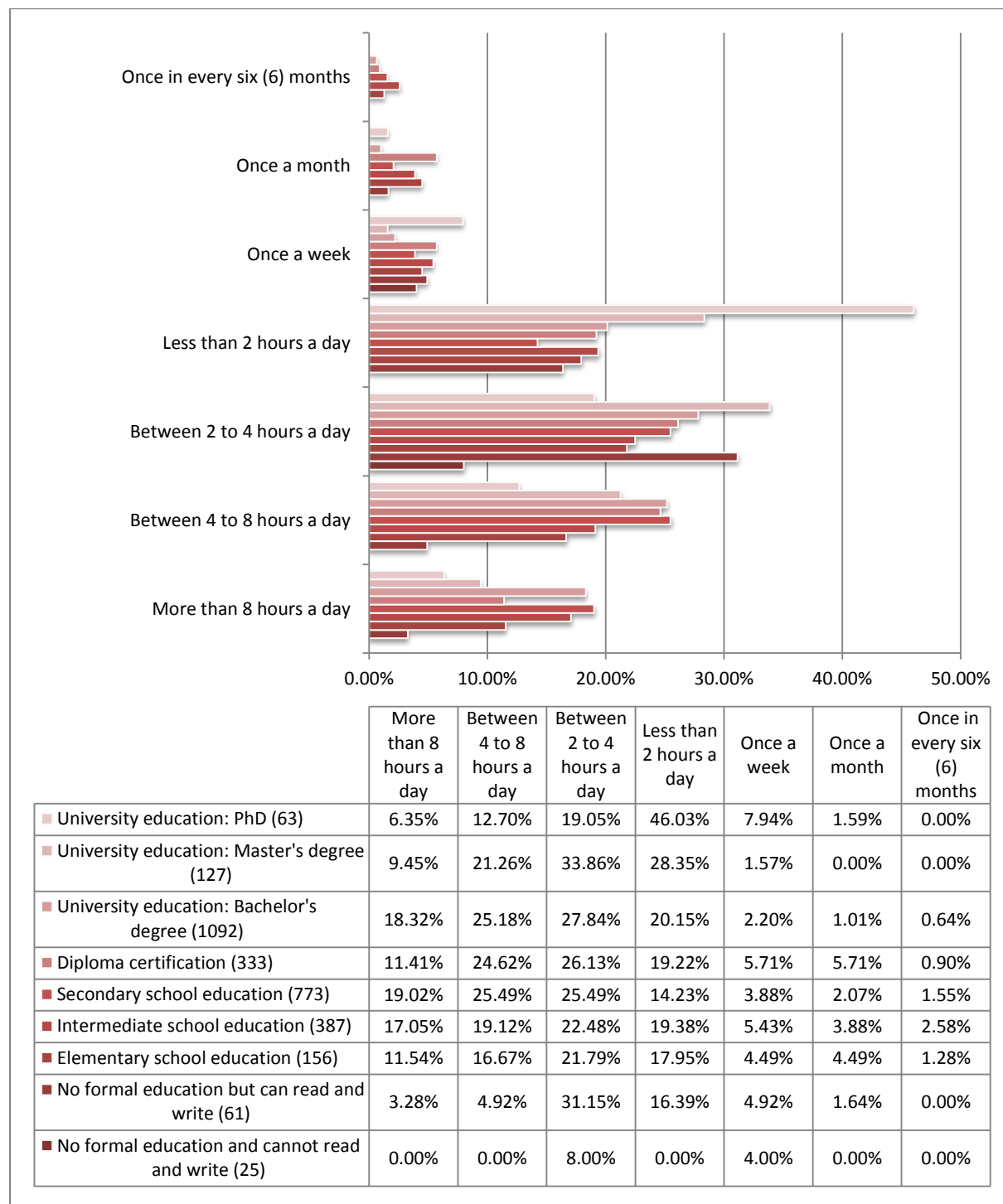Figure 129 shows the usage pattern of respondents of different marital status on social networking sites.

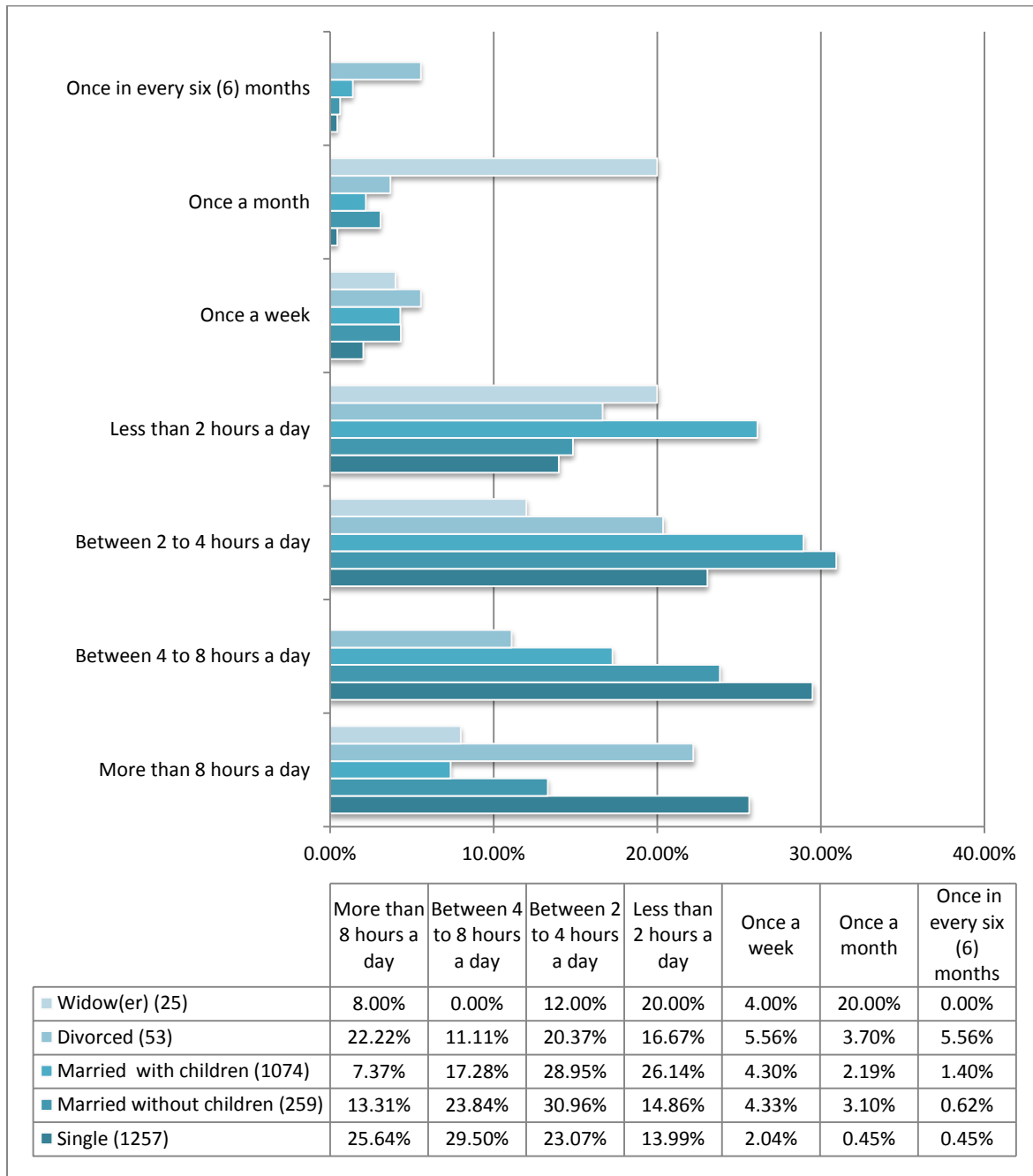|	More than 8 hours a day	Between 4 to 8 hours a day	Between 2 to 4 hours a day	Less than 2 hours a day	Once a week	Once a month	Once in every six (6) months
Widow(er) (25)	8.00%	0.00%	12.00%	20.00%	4.00%	20.00%	0.00%
Divorced (53)	22.22%	11.11%	20.37%	16.67%	5.56%	3.70%	5.56%
Married with children (1074)	7.37%	17.28%	28.95%	26.14%	4.30%	2.19%	1.40%
Married without children (259)	13.31%	23.84%	30.96%	14.86%	4.33%	3.10%	0.62%
Single (1257)	25.64%	29.50%	23.07%	13.99%	2.04%	0.45%	0.45%

Figure 129:   Frequency of use of Online Social Networks: Marital Status-wise

12.3   Reasons for not using Online Social Networks

What are your reasons for not using online social networks? (Multiple Choice)

As depicted in the figure below, most of the non-users have either no interest or lost interest in using online social networks.
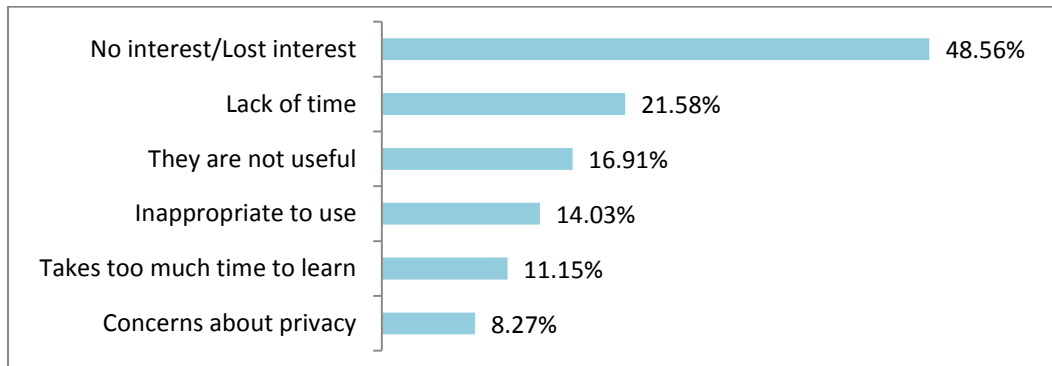

Figure 130:   Reasons for not using Online Social Networks (Total non-Users – 276)[54]

13.   e-Services

13.1   Use of e-Services

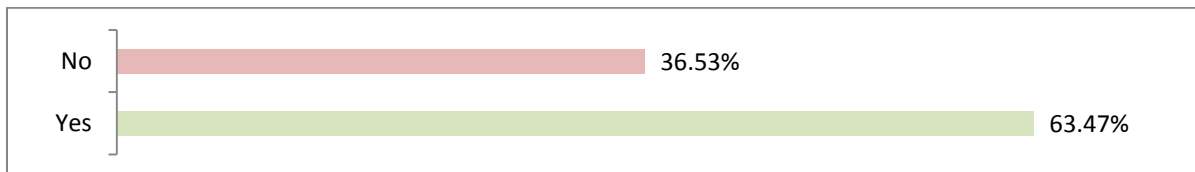Figure 131 depicts that nearly 63.47% of all respondents use e-Services.
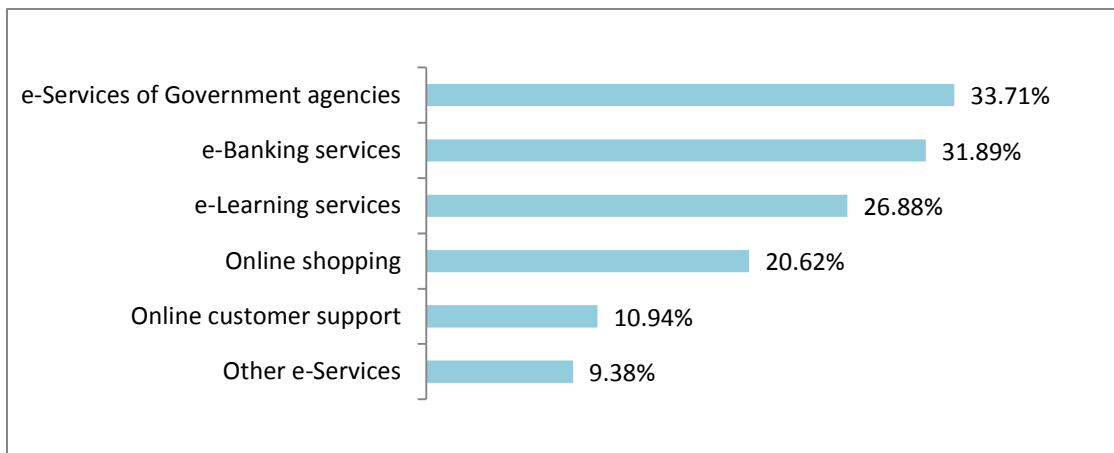

**Figure 131:   Users of e-Services (% of all 3000 respondents)**

Which of the following e-Services do you use? (Multiple Choice)

Figure 132 shows the distribution of users who use different e-Services. It is found that the most widely used e-Services are Government Services and e-Banking.

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[54] 19.42% of the respondents who answered "Others" not shown.

Figure 132:   Users of different e-Services (% of all 3000 respondents)
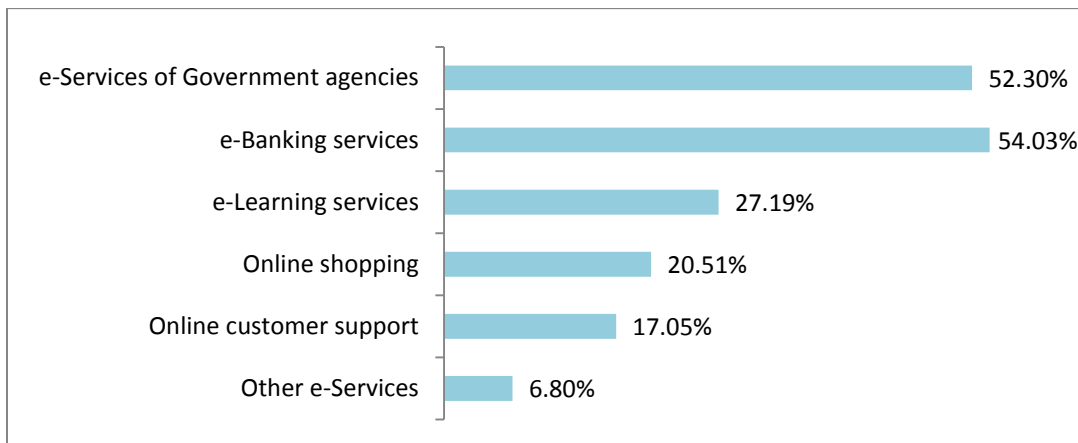
Figure 133:   Users of different e-Services (% of Household Heads)

Figure 134 and Figure 135 show the trends of use of e-Service among different nationalities and gender respectively. The use of most of the listed e-Services is found to be more prevalent among Saudis than expatriates as the Figure 134 reveals. It is noted that more percentage of female respondents use e-Learning and Online Shopping services than males as shown in Figure 135.
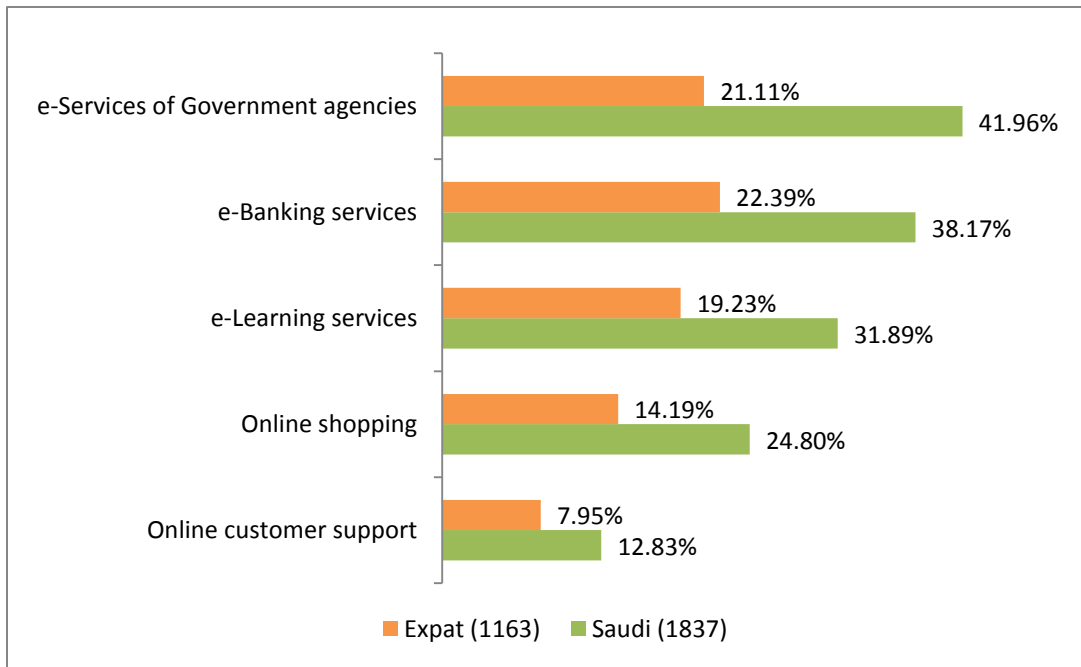
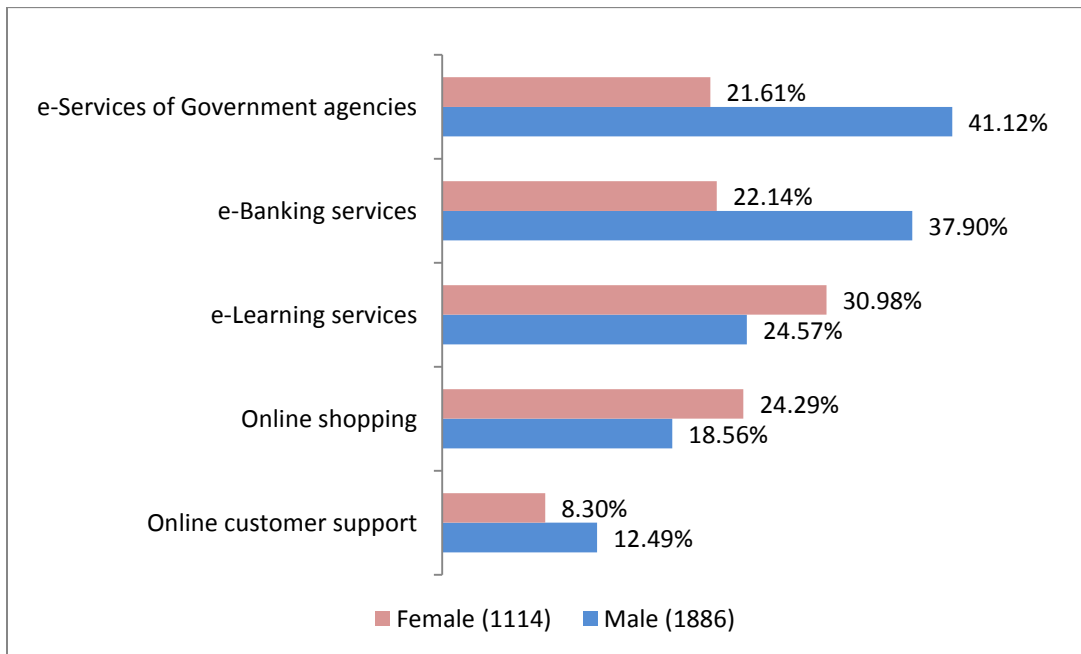**Figure 134:   Users of e-Services: Nationality-wise**

Figure 135:   Users of e-Services: Gender-wise

13.2 Reasons for not using e-Services

What are your reasons for not using e-Services? (Multiple Choice)

As shown in Figure 136, almost 51.27% of non-users said that they don't need to use any e-Service while nearly 26.68% do not know how to use them.
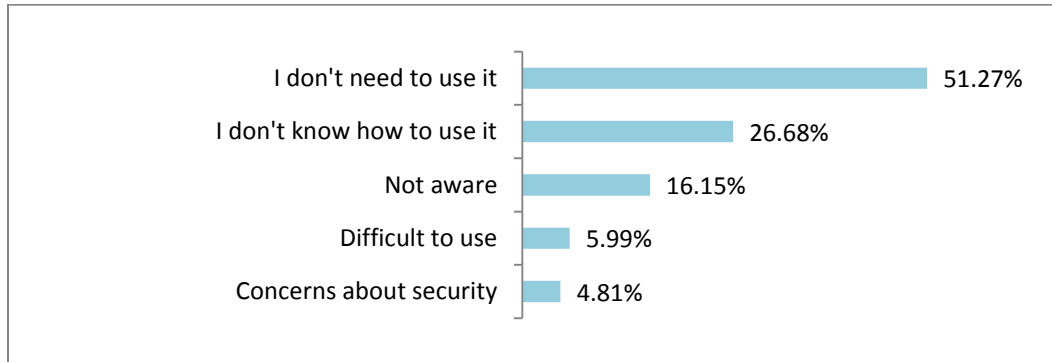

Figure 136:   Reasons for not using e-Services (Total Non-Users – 1096)

13.3 Purchasing of Products/Services over the Internet

Do you purchase or place orders for product(s) and/or service(s) over the Internet? (Single Choice)

Figure 137 shows that 25% of users either purchase or place orders online to buy products and/or services.

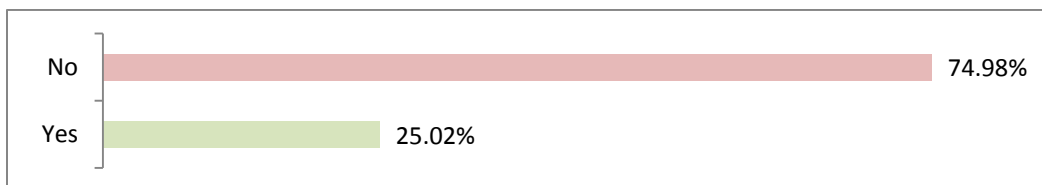**Figure 137:   Users who purchase or place orders online (% of all 3000 respondents)**

What are your reasons for not purchasing or placing orders for product(s) and/or service(s) over the Internet? (Multiple Choice)

Figure 138 depicts that nearly 26% of respondents, who do not purchase or place order online, don't know how to buy over the Internet while about 36% doesn't find any products or services that are useful.
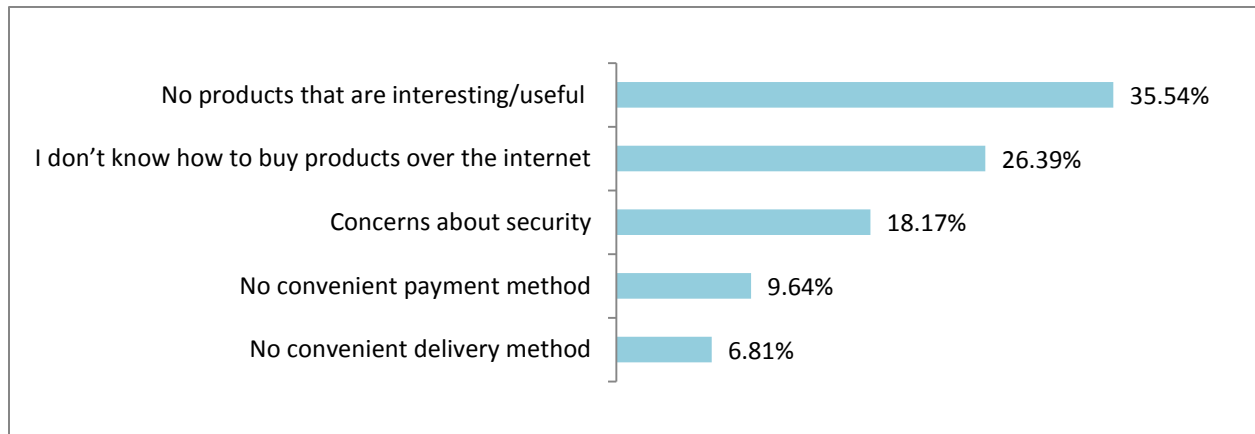
Figure 138:   Reasons for not Purchasing Products/Services over the Internet (Total non-users – 2249)

What types of purchases do you make over the Internet? (Multiple Choice)

Figure 139 and Figure 140 show percentages of users who purchase tangible and non-tangible items over the Internet.
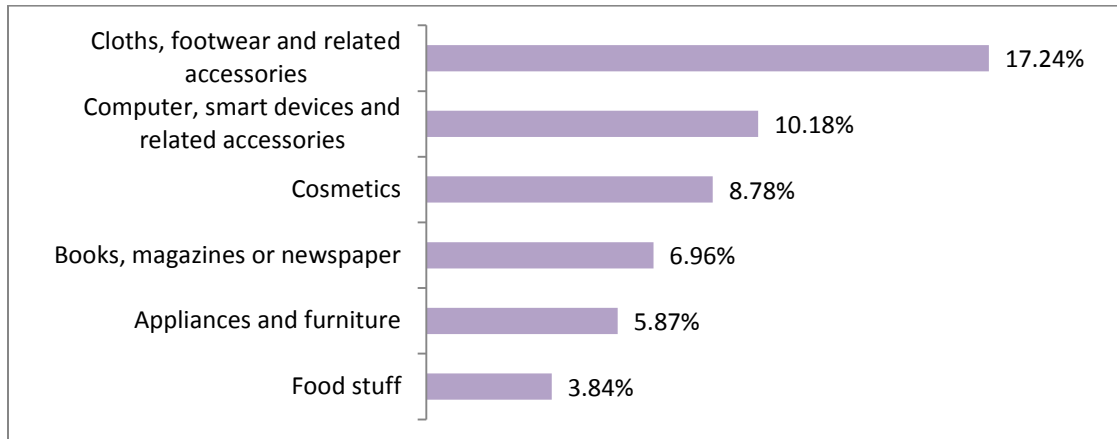
Figure 139:   Tangible Items purchased over the Internet (% of all 3000 respondents)
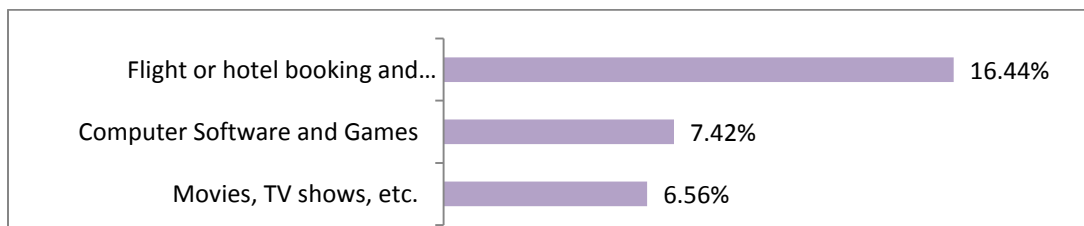
Figure 140:   Non-tangible Items purchased over the Internet (% of all 3000 respondents)

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Figure 141 and Figure 142 show percentages of users (nationality-wise) who purchase tangible and non-tangible items over the Internet.

Figure 141: **Tangible Items purchased over the Internet: Nationality-wise**

Figure 142: **Non-tangible Items purchased over the Internet: Nationality-wise**

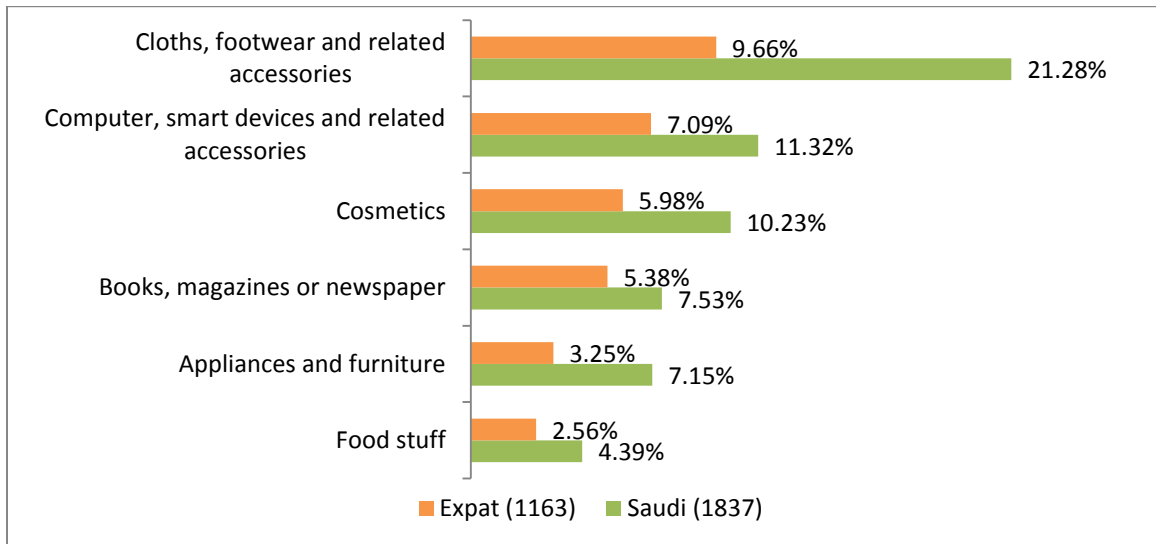Figure 143 and Figure 144 show percentages of users (gender- wise) who purchase tangible and non-tangible items over the Internet.
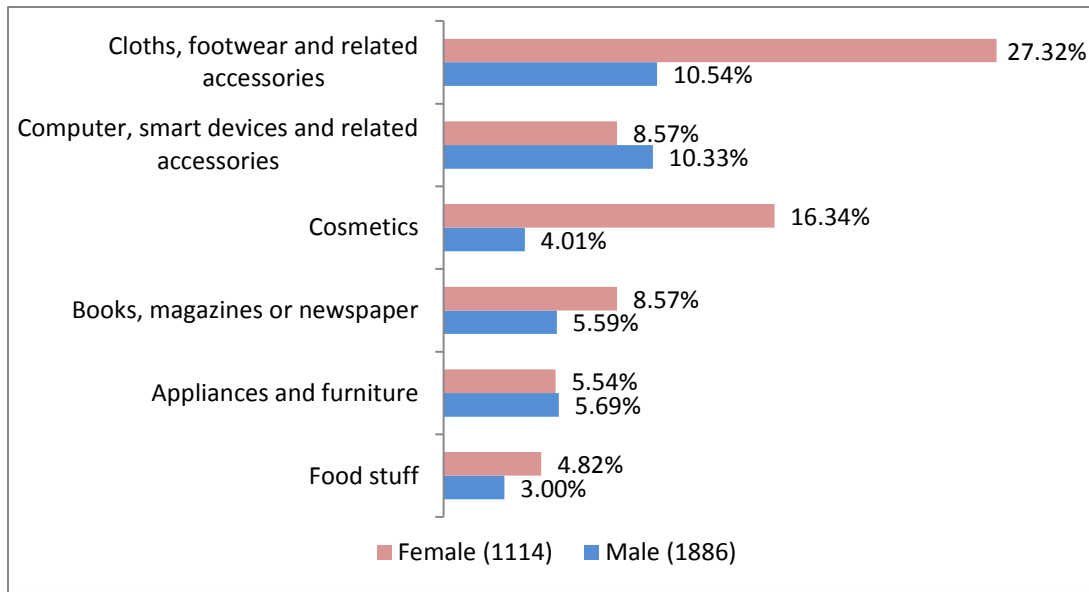
Figure 143: Tangible Items purchased over the Internet: Gender-wise

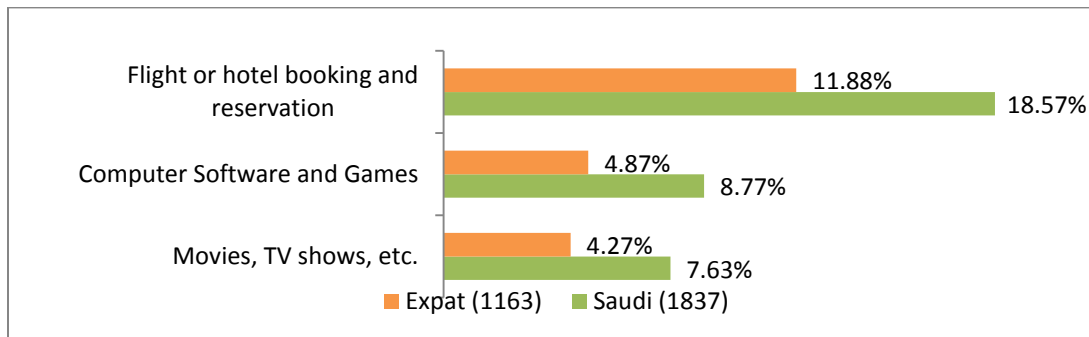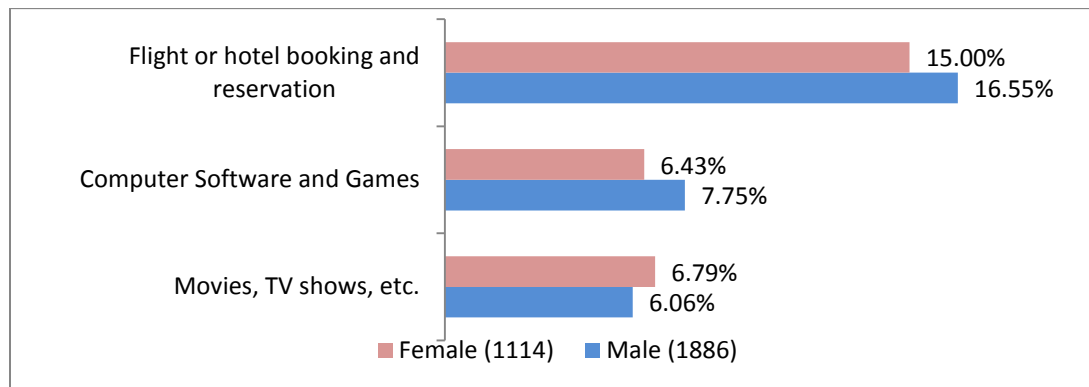**Figure 144: Non-tangible Items purchased over the Internet: Gender-wise**

13.4   Use of Payment Method(s)

Which of the following payment method(s) do you use? (Multiple Choice)

Figure 145 shows the percentage of respondents who use the various listed modes of online payment. On the other hand, Figure 146 shows other payment methods (e.g. Cash on Delivery) used by respondent to buy goods and services.

We observe for all the payment methods that more male use them than females and more Saudis use them than expatriates, while SADAD is the most widely used mode.

SADAD		31.32%
Credit/Debit Card online		14.09%
e-Vouchers (e.g. Qitaf, One-Card)		8.19%
e-Payment (e.g. Paypal)		4.41%
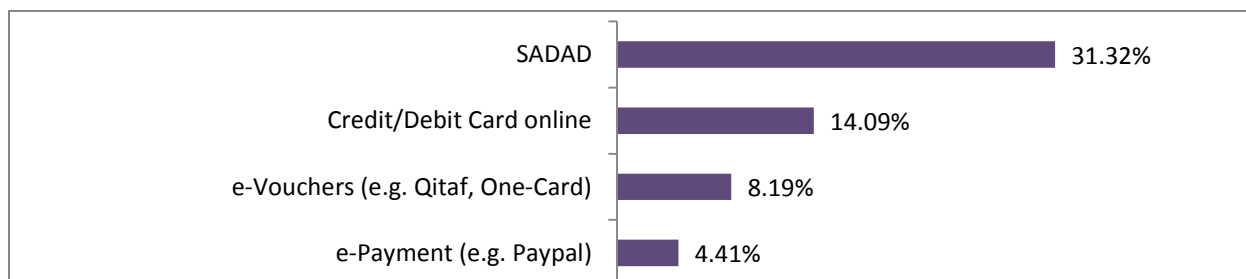
Figure 145:   Use of Online Payment Methods (% of all 3000 respondents)

Credit/Debit Card on Point of Sale (PoS)		24.43%
Phone Banking		13.62%
Cash on Delivery (CoD)		13.23%
SMS Banking		8.82%
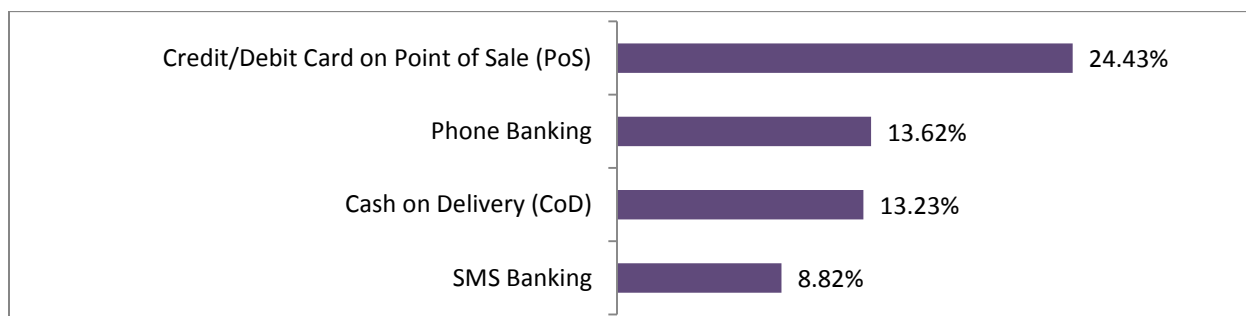
Figure 146:   Use of Other Payment Methods (% of all 3000 respondents)

Below Figures show users (income- wise) who use online and other payment methods respectively.

	e-Vouchers (e.g. Qitaf, One-Card)	e-Payment (e.g. Paypal)	Credit/Debit Card online	SADAD
50,001 and above (13)	7.69%	23.08%	53.85%	76.92%
30,001-50,000 (13)	30.77%	30.77%	46.15%	69.23%
20,001-30,000 (39)	7.69%	15.38%	46.15%	56.41%
15,001-20,000 (110)	9.09%	7.27%	40.91%	65.45%
11,001-15,000 (205)	10.24%	9.76%	34.15%	56.10%
7,001-11,000 (345)	13.33%	8.70%	28.70%	54.78%
3,001-7,000 (636)	14.94%	2.83%	10.22%	35.06%
Less than SAR 3,000 (779)	4.49%	4.36%	8.22%	17.07%
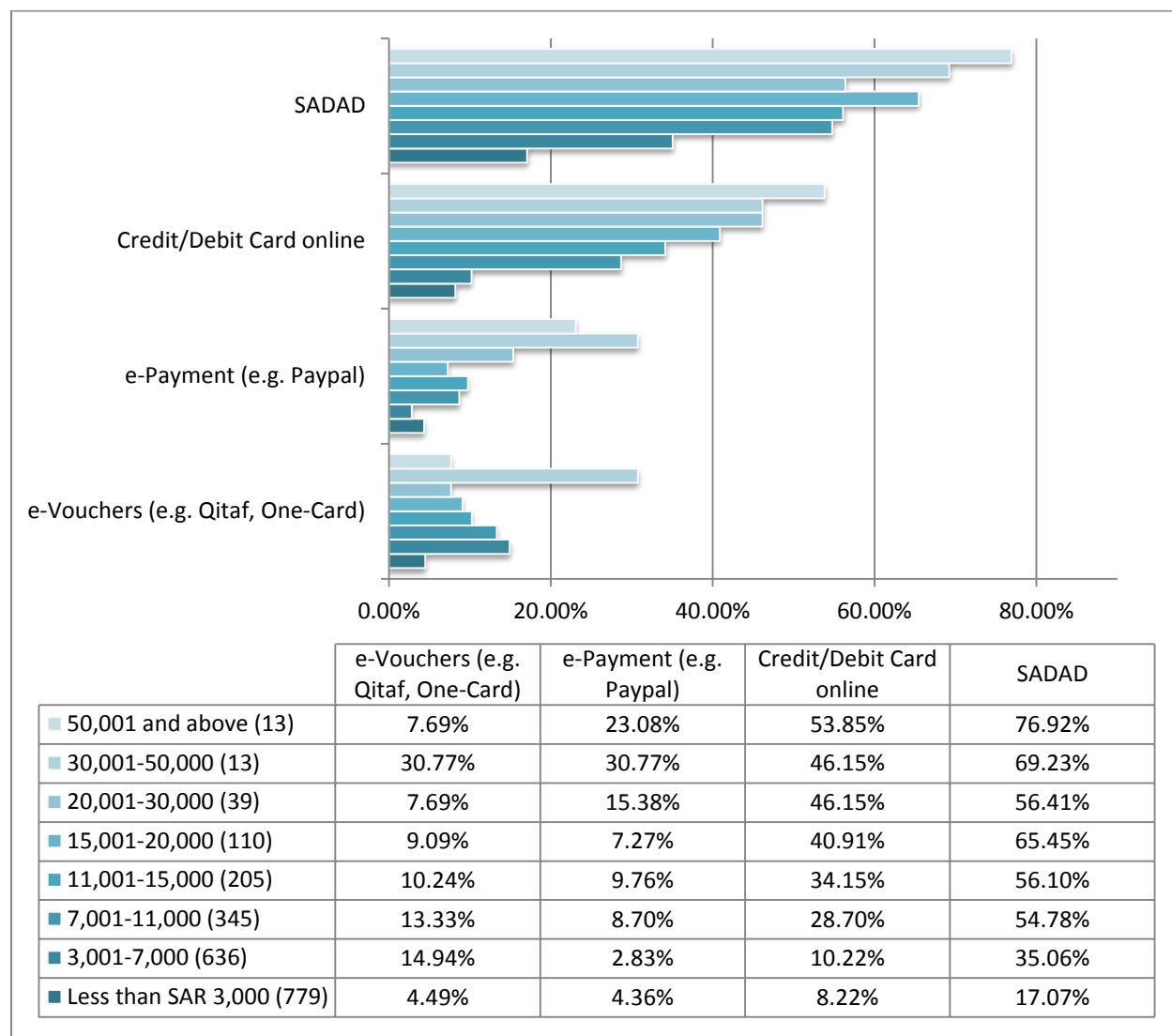
Figure 147:   Use of Online Payment Methods: Income-wise (% of all respondents)

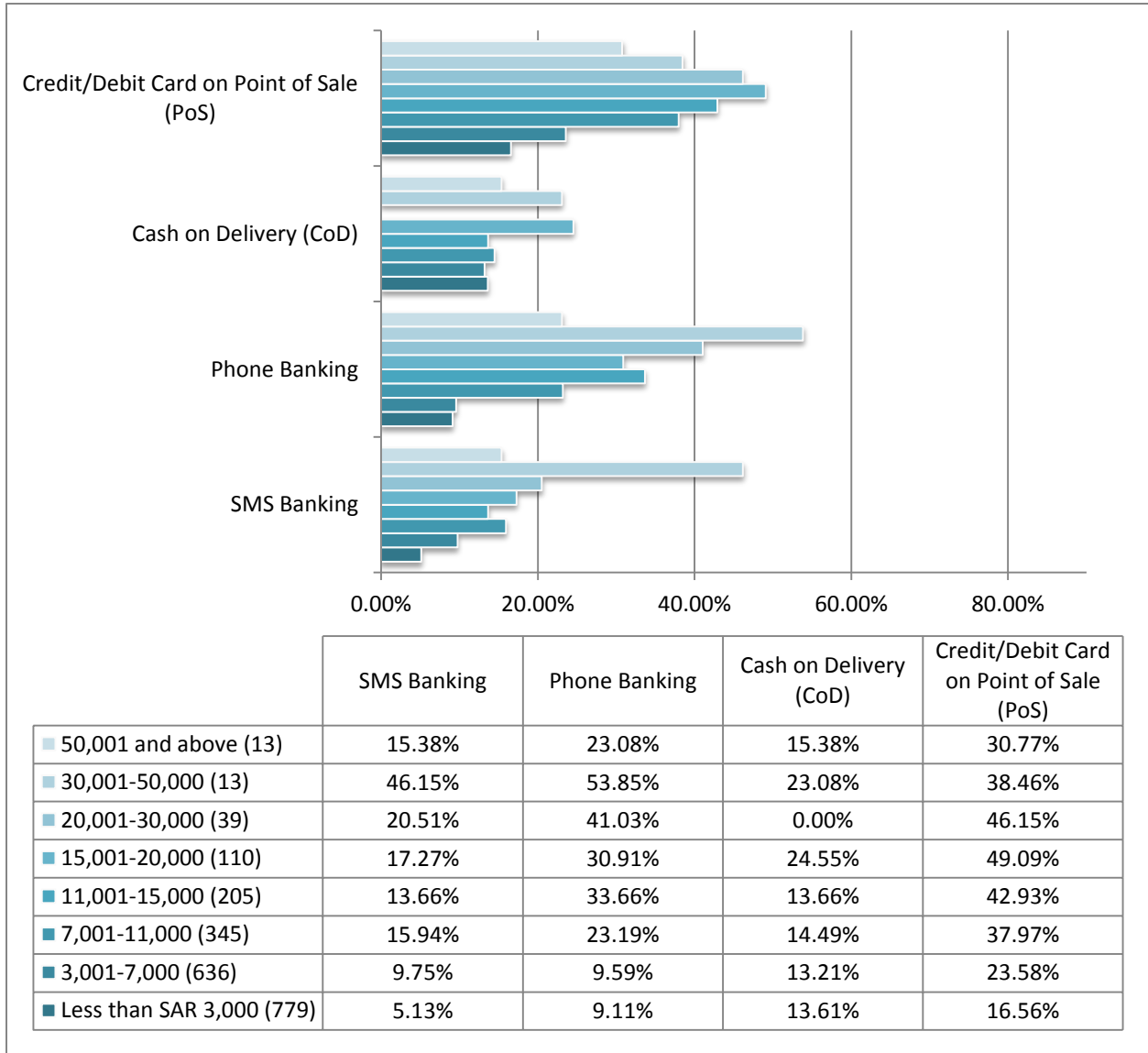|	SMS Banking	Phone Banking	Cash on Delivery (CoD)	Credit/Debit Card on Point of Sale (PoS)
■ 50,001 and above (13)	15.38%	23.08%	15.38%	30.77%
■ 30,001-50,000 (13)	46.15%	53.85%	23.08%	38.46%
■ 20,001-30,000 (39)	20.51%	41.03%	0.00%	46.15%
■ 15,001-20,000 (110)	17.27%	30.91%	24.55%	49.09%
■ 11,001-15,000 (205)	13.66%	33.66%	13.66%	42.93%
■ 7,001-11,000 (345)	15.94%	23.19%	14.49%	37.97%
■ 3,001-7,000 (636)	9.75%	9.59%	13.21%	23.58%
■ Less than SAR 3,000 (779)	5.13%	9.11%	13.61%	16.56%

**Figure 148:   Use of Other Payment Methods: Income-wise (% of all respondents)**

13.5   e-Banking

Please rate your satisfaction with e-banking, for the following?

It is found that around 31.89% of the respondents use e-Banking services. Table 9 summarizes the level of satisfaction of e-Banking users. The average satisfaction score is 3.82 (near to Good). Figure 149 shows the overall satisfaction of e-banking users.

Table 9.   e-Banking Satisfaction.

e-Banking Service	Avg. Satisfaction Score
Ease of service	3.90
Availability	3.88
Variety of offered services	3.70
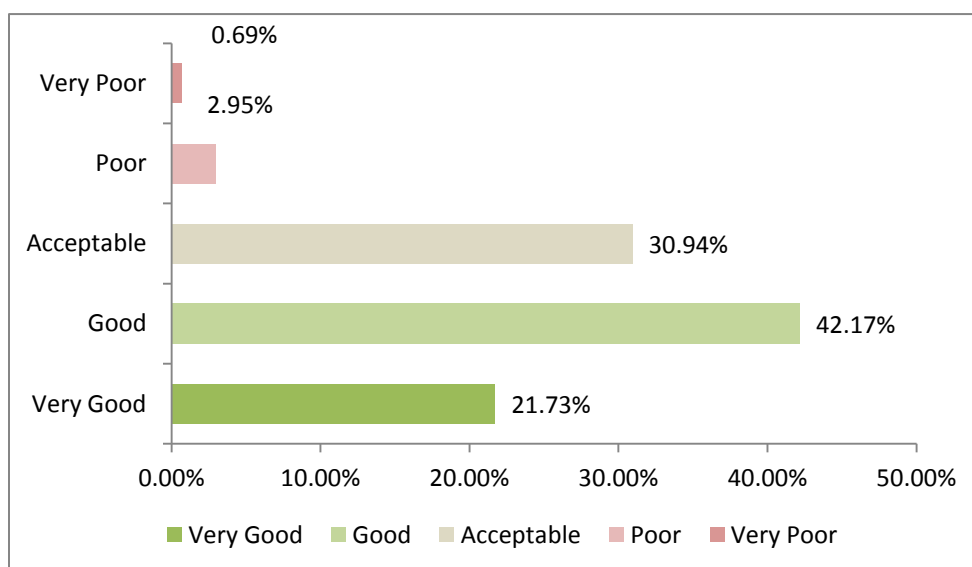
**Figure 149:   Overall Satisfaction for e-Banking services (Total e-Banking Users – 962)**

14. Complaints Handling

14.1 Service Provider

14.1.1 Respondents who complained to Service Provider

Have you ever faced any problem (for fixed-line, data, mobile, Internet, bundled services etc.) with your service providers? (Single Choice)

Figure 150 indicates that around 41.42% of all respondents faced some problem(s) with their Service Provider(s) for ICT services.
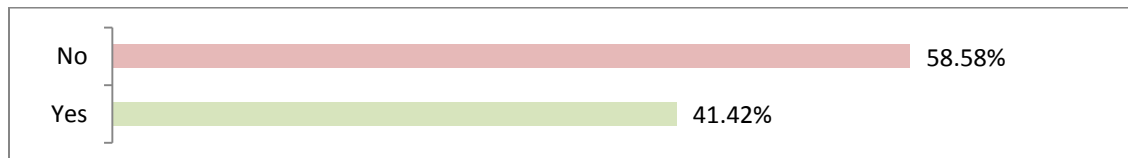
Figure 150:   Respondents who Faced Problems with Service Provider (% of all 3000 respondents)

Have you lodged a complaint with your service provider, regarding your service problem? (Single Choice)

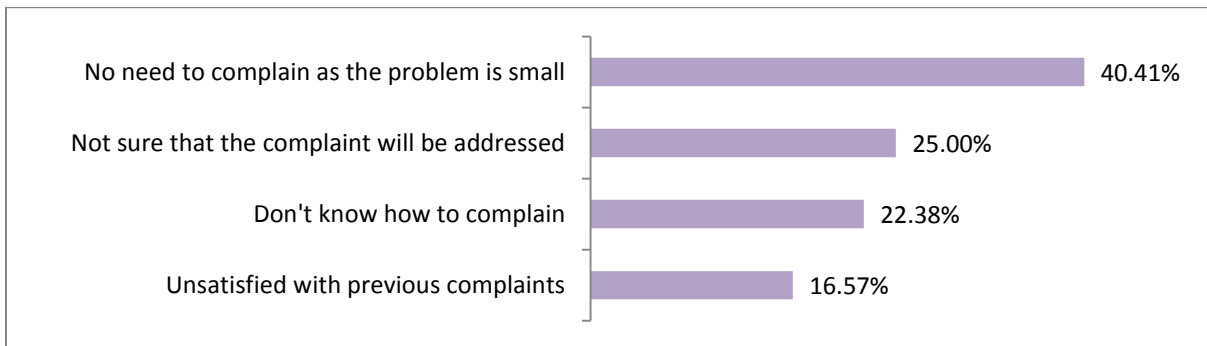Figure 151 indicates that 72.52% of users(1243) who faced issues have also complained to their Service Providers.
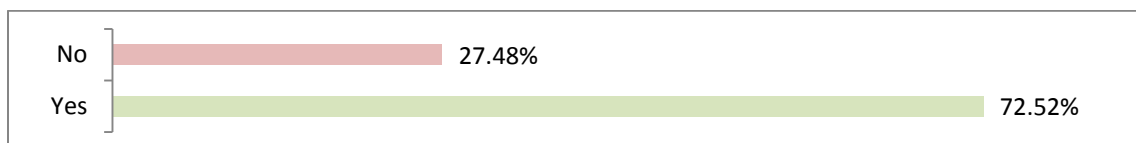
Figure 151:   Fraction of Users who complained to Service Provider (Total Respondents who Faced Problem with Service Provider - 1243)

14.1.2 Reasons for not complaining to Service Provider

What are your reasons for not complaining to your service provider? (Multiple Choice)

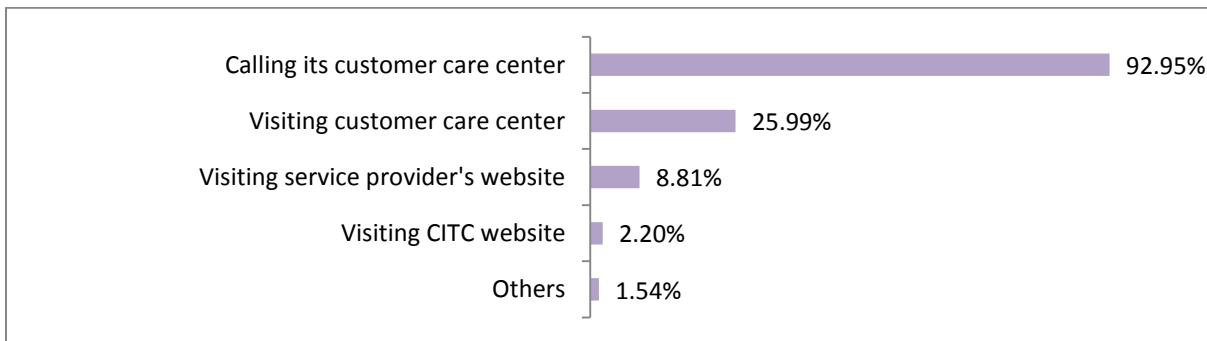Figure 152 shows the reasons due to which users are not complaining to the Service Provider.

No need to complain as the problem is small — 40.41%
Not sure that the complaint will be addressed — 25.00%
Don't know how to complain — 22.38%
Unsatisfied with previous complaints — 16.57%

Figure 152:   Reasons for not complaining to Service Provider (Total Non-Complainants - 341)[55]

14.1.3 Means of Registering Complaints

How did you register your complaint to your service provider? (Multiple Choice)

Figure 153 shows the information about the Customer Care Channels through which the users complained to the Service Provider.


Calling its customer care center — 92.95%
Visiting customer care center — 25.99%
Visiting service provider's website — 8.81%
Visiting CITC website — 2.20%
Others — 1.54%

Figure 153:   Means of Registering Complaints to Service Provider (Total Complainants - 902)

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[55] 11.63% of the respondents who answered "Others" not shown.

When you registered your complaint(s) to the service provider, did they provide you with a reference number? (Single Choice)

Figure 154 depicts that only 62% of users, who complained to the Service Provider, have received the complaint reference number.
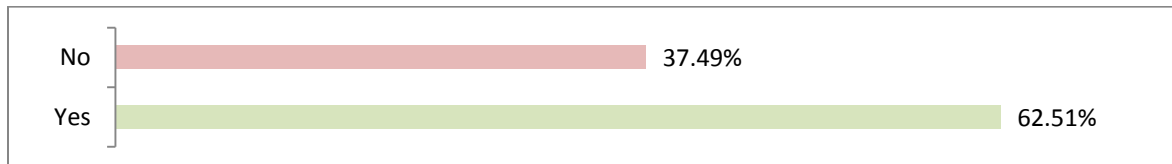
Figure 154:   Percentage of complainants who received Complaint Reference Number from Service Provider (Total Complainants - 902)

Was your complaint addressed by the service provider? (Single Choice)

Figure 155 depicts that only 46% of users, who faced issues with their Service Provider, got their problem resolved within 15 days after registering their complaints with their Service Provider.
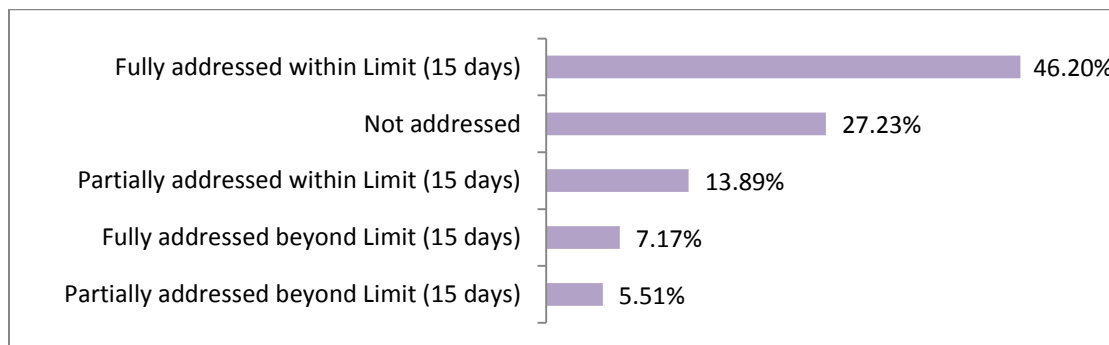
Figure 155:   Complaints addressed by Service Provider (Total Complainants – 902)

Figure 156 shows how the complaints are addressed by Service Providers for complainants who submitted their complaints through various channels. It is found that around 47.11% of the users, who complained to the Service Providers by Calling to the Customer Care Center and 30% of those who visited the Customer Care Center for registering the complaint, got their complaint fully addressed within 15 days.
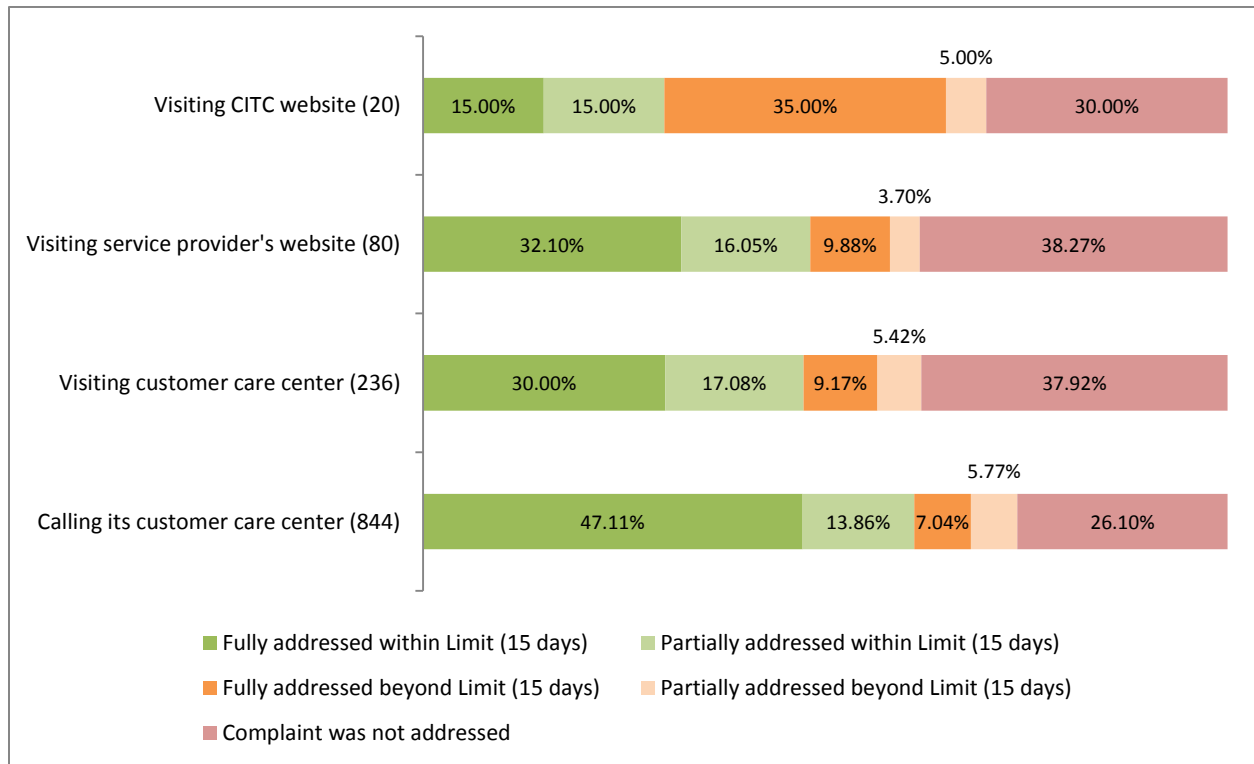
Individuals Report 2014
ICT Market Study Project   © CITC 2014

Figure 156:   Complaints Registered through various channels addressed by Service Providers

14.1.4   Satisfaction in handling the complaint by Service Provider

Please rate your satisfaction with your service provider in handling your complaint(s).

The overall Satisfaction in handling complaint by Service Provider is below Acceptable (2.90).
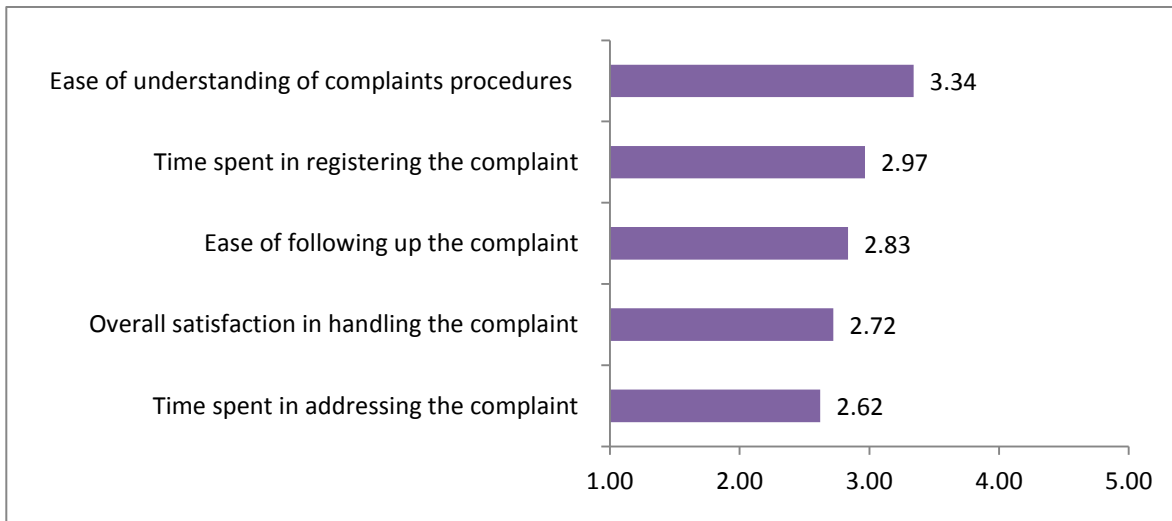
Figure 157:   Satisfaction rating in handling the complaint by Service Provider
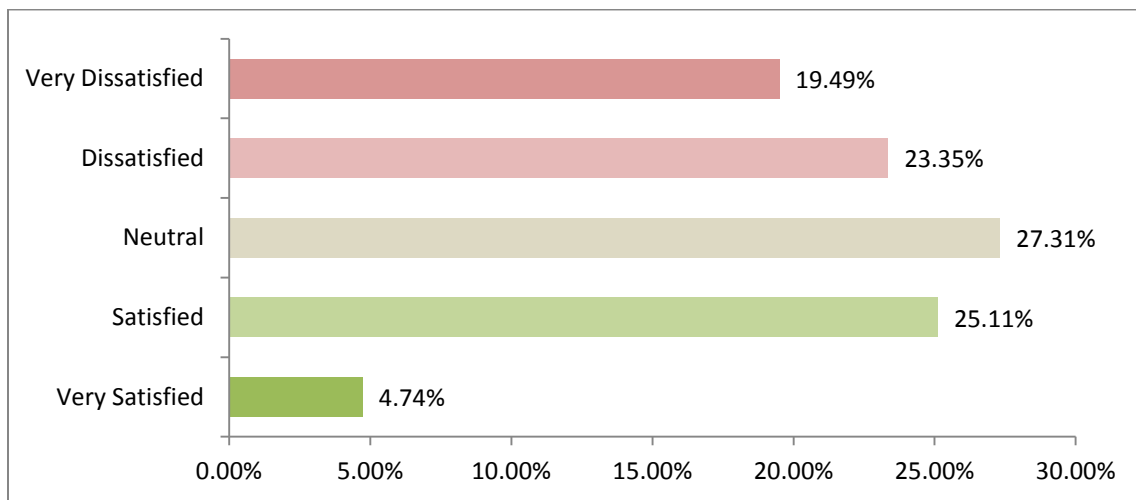

Figure 158:   Overall Satisfaction in handling the complaint by Service Provider (Total Complainants – 902)

14.2   CITC

14.2.1   Respondents who complained to CITC

Have you ever lodged a complaint to CITC, regarding your problem with the service provider, or for any other reason? (Single Choice)

Below Figure indicates that only 5.54% of all respondents have complained to CITC irrespective of the fact that whether they have complained to the Service Provider or not.
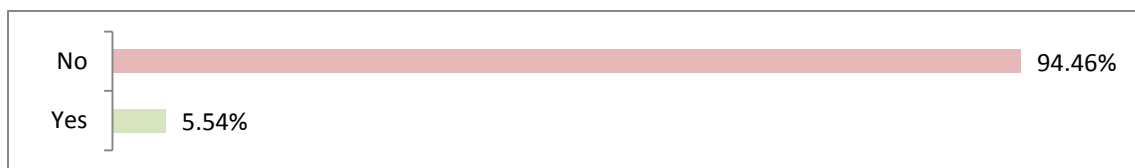
Figure 159: Respondents who complained to CITC (% of all 3000 respondents)

Are you aware that you can register a complaint regarding your service providers with CITC if the problem was not resolved by the service provider within 15 days of your initial complaint? (Single Choice)

It is evident from the following figure that only 21.80% of all the respondents were aware of the fact that they can register complaint to CITC about the Service Providers if their problems were not resolved within 15 days of initial complaints.
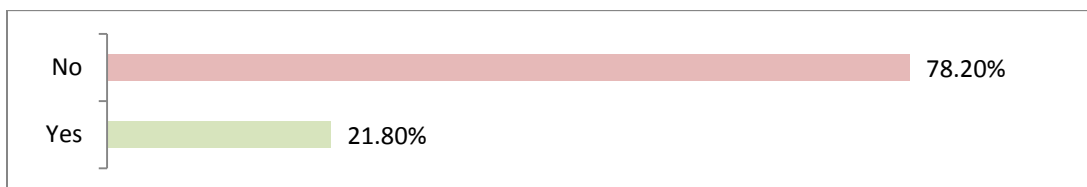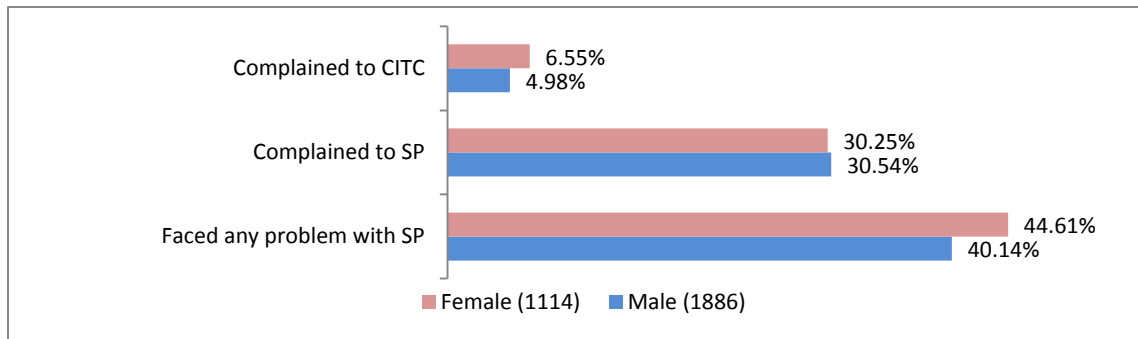

Figure 160: Users' Awareness regarding Complain of Service Provider to CITC (% of all 3000 respondents)

Below figures show nationality-wise and gender-wise percentage of the complainants.
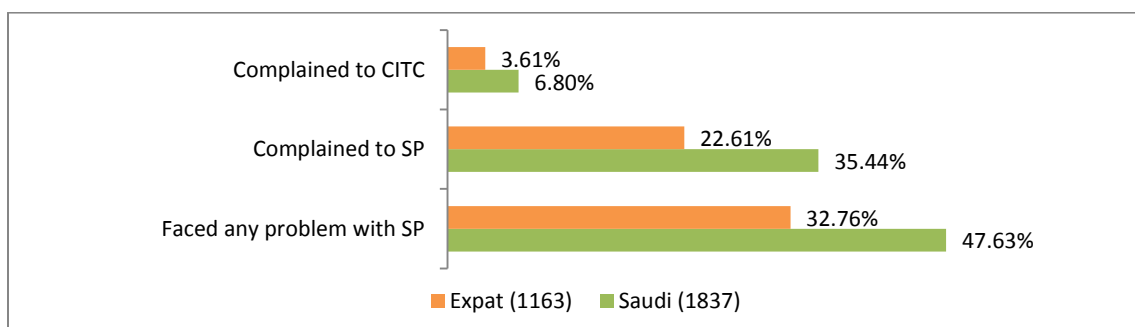
Figure 161: Respondents who registered complaints to CITC and Service Provider: Nationality-wise
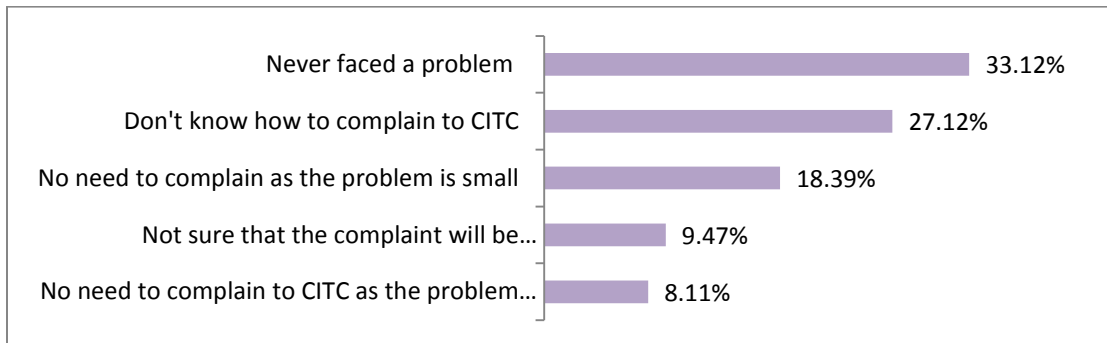
Figure 162:   Respondents who registered complaints to CITC and Service Provider: Gender-wise

14.2.2   Reasons for not complaining to CITC

What are your reasons for not complaining to CITC? (Multiple Choice)

As indicated earlier, only 5.54% of all respondents have complaint to CITC. Out of the 94.46% of respondents who did not complain to CITC, nearly one-third (33.12%) had never faced any problem. A considerable number of respondents (27.12%) did not know how to complain to CITC.


Figure 163:   Reasons for not complaining to CITC (Total Non-Complainants – 2834)[56]

14.2.3   Satisfaction in handling the complaint by CITC

Please rate your satisfaction with CITC in handling your complaint(s). (Single Choice)

The overall satisfaction score with respect to handling of complaints by CITC is found to be Acceptable (3.02). Following figure shows the satisfaction of users, who registered complaints to CITC, with CITC in handling the complaints.

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[56] 15.54% of the respondents who answered "Others" not shown.
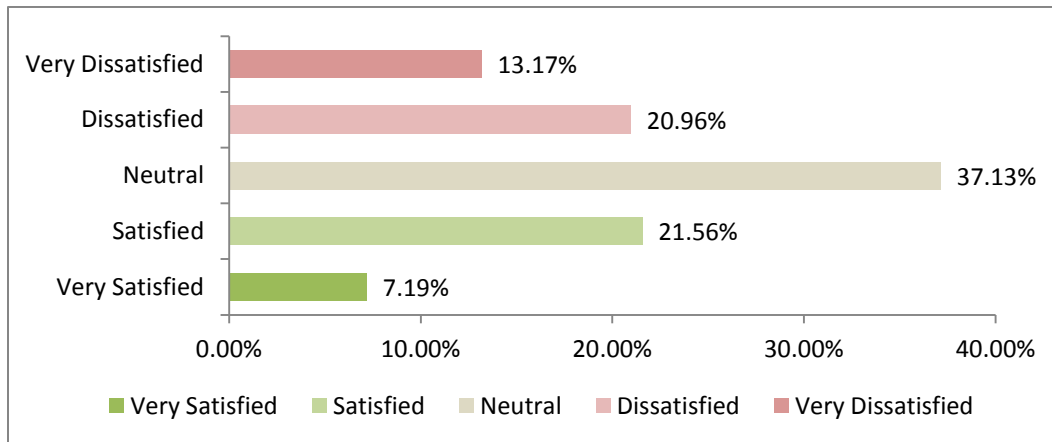
Figure 164:   Overall Satisfaction in handling the complaint by CITC (Total Complainants – 166)

Following figure depicts the satisfaction of users with respect to various aspects of complaining procedures. It is found that users' satisfaction regarding the ease of understanding of CITC complaints procedures is above Acceptable while the time spent by CITC in addressing the complaint is below Acceptable.
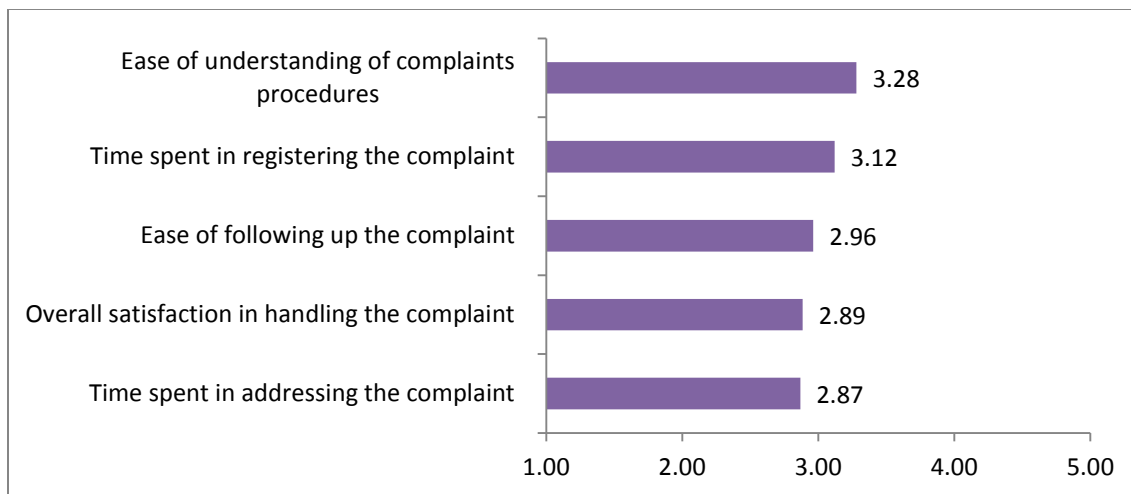
Figure 165:   Satisfaction rating with respect to various aspects of complaining to CITC

15. Perception and Awareness

15.1 Registering a "السعودية." domain name for website

Are you aware that you can register an Arabic domain name for your website ending with "السعودية."? (e.g: السعودية.سجل) (Single Choice)

It is found that only 20.68% of all respondents are aware of the fact that they can register an Arabic domain name for website ending with "السعودية.".
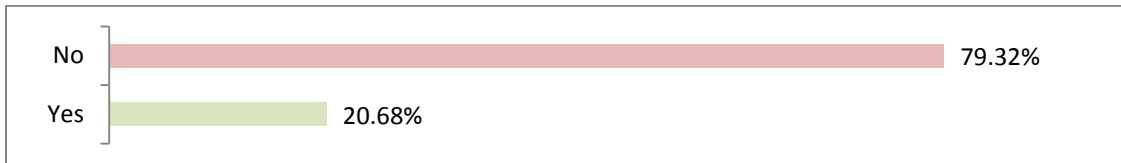
No ▬▬▬▬▬▬▬▬▬▬▬ 79.32%
Yes ▬▬▬ 20.68%

Figure 166: Awareness of users for registering "السعودية." domain name for website (% of all 3000 respondents)

15.2 Mobile Number Portability Service

Are you aware that you can now change your mobile operator in Saudi Arabia for free without changing your phone number (Mobile Number Portability Service)? (Single Choice)

It is found that nearly half of all the respondents are aware of the fact that they can change their mobile operator in Saudi Arabia for free without changing the phone number.
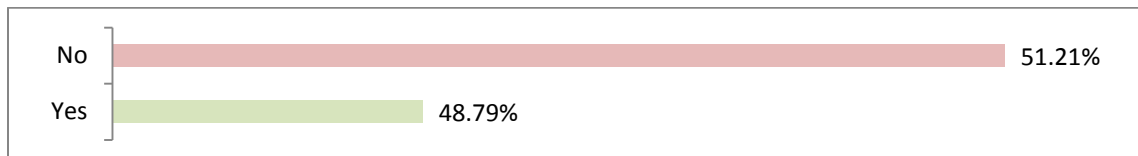
No ▬▬▬▬▬▬▬▬ 51.21%
Yes ▬▬▬▬▬▬ 48.79%

Figure 167: Awareness of users for Mobile Number Portability Service (% of all 3000 respondents)

## 15.3   Perception about Internet Content Filtering

Which of the following best describes your opinion about Internet content filtering? (Single Choice)

Below figure depicts the perception of respondents about the implementation of Internet Content Filtering by the authorities.
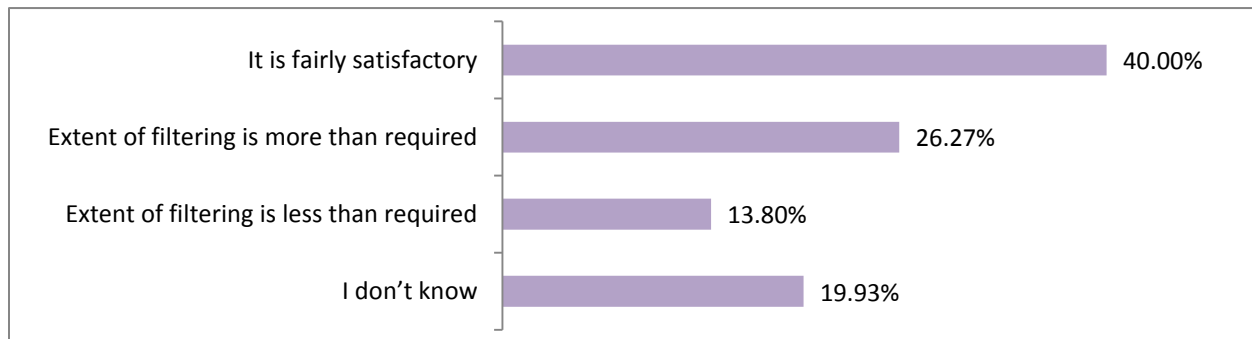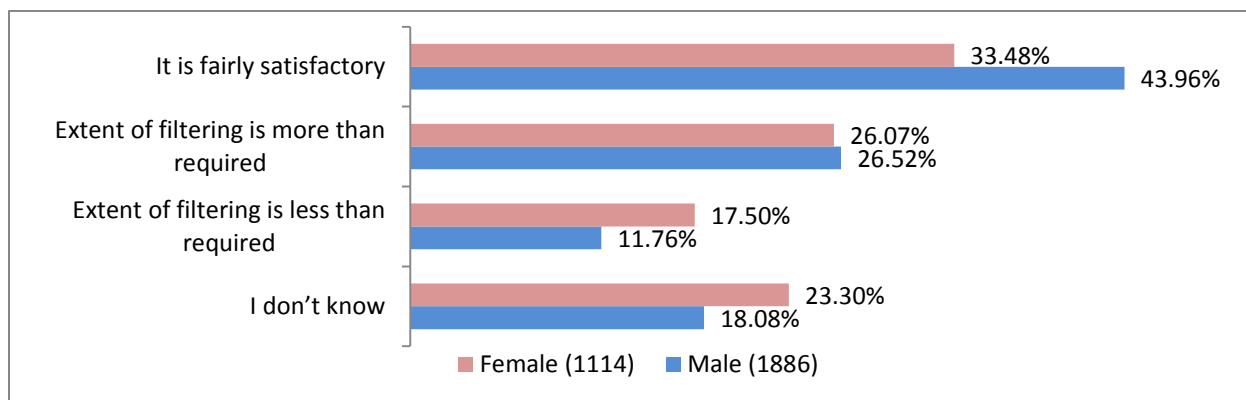

Figure 168:   Users' opinion regarding Internet Content Filtering (% of all 3000 respondents)

Figure 169 and Figure 170 show the users' opinion about Internet Content Filtering from the viewpoint of nationalities and gender respectively.
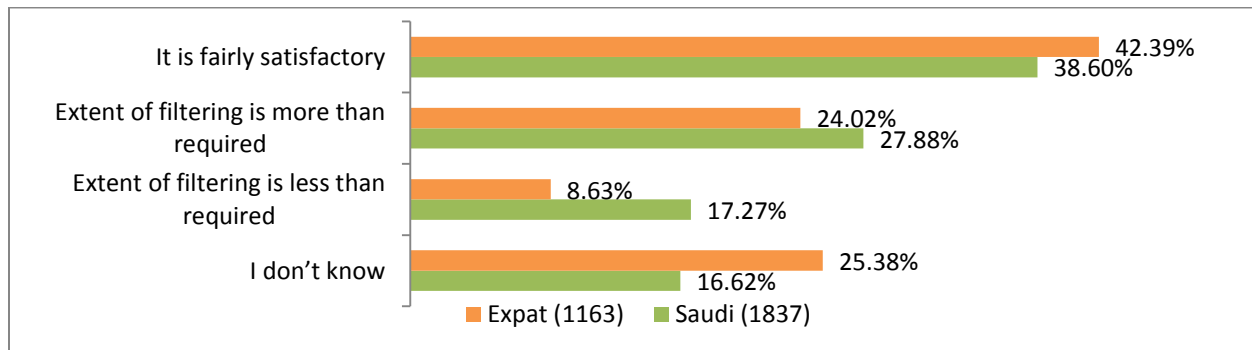
Figure 169:   Users' opinion regarding Internet Content Filtering: Nationality-wise

Figure 170:   Users' opinion regarding Internet Content: Gender-wise