Individuals Report  
ICT Survey Results, 2015  
Prepared By:
This work is copyright. Prepared by the Communications and Information Technology Commission (CITC). Apart from any use as permitted under the Saudi Arabia’s Laws and Regulations, no part may be reproduced by any process without prior written permission from the CITC. Requests and inquiries concerning reproduction and rights should be addressed to the Market Studies Director, Communications and Information Technology Commission, PO Box 75606, Riyadh 11588, Saudi Arabia.

All data and information presented in the report represent the views of the various consumer segments and opinions of ICT Stakeholders in Saudi Arabia.
# Table of Contents

1. Executive Summary 7  
2. Background Information 8  
3. Introduction 9  
4. Deployment Methodology 9  
5. Respondent Profile and Demographics 10  
6. Rating System 12  
7. General ICT Usage and Services 13  
8. Fixed and Mobile Voice Services 17  
   8.1 Fixed Telephony Services 17  
      8.1.1 Use of Fixed Telephony 17  
      8.1.2 Reasons for not using Fixed Telephony Services 17  
      8.1.3 Average Monthly Spending on Fixed Telephony 18  
      8.1.4 Satisfaction Rating for Fixed Telephony 19  
   8.2 Mobile Voice Services 20  
      8.2.1 Use of Mobile Voice 20  
      8.2.2 Subscription of Mobile Voice Services 20  
      8.2.3 Users of Mobile Voice Services 22  
      8.2.4 Average Monthly Spending on Mobile Voice Services for Primary Line 24  
      8.2.5 Price Rating for Mobile Voice Services for Primary Line 24  
      8.2.6 Satisfaction Rating for Mobile Voice Services for Primary Line 25  
      8.2.7 Considering Changing Mobile Service Provider (for Voice) 26  
9. Internet Services 28  
   9.1 Internet Usage 28  
      9.1.1 Internet User vs. Non-Users 28  
      9.1.2 Reasons for not using Internet in the last six (6) months 30  
      9.1.3 Place of Internet usage 32  
      9.1.4 Time Spent on Internet 34  
   9.2 Internet Services at Home 37
9.2.1 Use of Internet at Home
9.2.2 Reasons for not using Internet at Home
9.2.3 Internet Activities that users do at Home
9.2.4 Internet at Home using 3G/4G Service
9.2.5 Internet at Home using Other Services (DSL, FTTH, and WiMAX)

9.3 Mobile Internet Services
9.3.1 Use of Mobile Internet
9.3.2 Reasons for not using Mobile Internet Services
9.3.3 Subscription of Mobile Internet Services
9.3.4 Type of Mobile Internet Access being used
9.3.5 Internet Activities using Mobile Internet Services
9.3.6 Average Monthly Spending on Mobile Internet Services for Primary Line
9.3.7 Price Rating for Mobile Internet Services for Primary Line
   (Dedicated Data SIM)
9.3.8 Satisfaction Rating for Mobile Internet Services for Primary Line

10. Services Packages
10.1 Types of Bundled Services
10.2 Reasons for not using Bundled Services
10.3 Average Monthly Spending on Service Packages
   10.3.1 Mobile Voice/Internet Service Packages
10.4 Price Rating for Service Packages
10.5 Satisfaction Rating for Service Packages
10.6 Dissatisfaction with Service Packages

11. Computers, Devices and Gaming Consoles
11.1 Use of Computers {desktop/laptop/tablets}
11.2 Reasons for not using Computers {desktop/laptop/tablets}
11.3 List of Activities done using Computers {desktop/laptop/tablets}
11.4 Frequency of Changing Mobile Handsets
11.5 Average Annual Spending on Mobile Handsets
11.6 Computer and Internet Household Users

12. **Online Social Networks**
   12.1 Use of Online Social Networks
   12.2 Time Spent on Online Social Networks
   12.3 Reasons for not using Online Social Networks

13. **e-Services**
   13.1 Use of e-Services
   13.2 Reasons for not using e-Services
   13.3 Purchasing of Products/Services over the Internet
   13.4 Use of Payment Method(s)
   13.5 e-Banking

14. **Complaints Handling**
   14.1 Service Provider
   14.1.1 Respondents who complained to Service Provider
   14.1.2 Reasons for not complaining to Service Provider
   14.1.3 Means of Registering Complaints
   14.1.4 Satisfaction in handling the complaint by Service Provider
   14.2 CITC
   14.2.1 Respondents who complained to CITC
   14.2.2 Reasons for not complaining to CITC
   14.2.3 Satisfaction in handling the complaint by CITC

15. **Perception and Awareness**
   15.1 Registering a “السعودية” domain name for website
   15.2 Mobile Number Portability Service
   15.3 Perception about CITC involvement in Reducing International Roaming Rates
   15.4 Perception about Internet Content Filtering
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 2015. 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 2015, on the ICT services and market in the Kingdom from 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 will provide 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 99% of the respondents using the service. Furthermore, nearly 78% of these users use prepaid SIMs while 18% use postpaid SIMs. The average monthly expenditure on the primary mobile (voice) services by a user is estimated at SAR 187/-. 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 2.8 on a scale of 5, where 5 means “very cheap”). The quality of various mobile (voice) services is observed to be Above Acceptable (i.e. a score of 3.61 on a scale of 5).

For fixed telephony, the average monthly spending is estimated at SAR 153/- per household. The level of satisfaction with fixed telephony services at home is nearly Satisfied (i.e. a score of 3.84 on a scale of 5).

Internet usage is found to be 91% based on the definition 1 (for age-group 12-65). It was also observed that nearly 86% of the Internet users spend 2 or more hours daily on Internet. Nearly 82% of all respondents use mobile Internet. It is found that 31% mobile Internet subscribers use dedicated data SIM (excluding ones used in 3G/4G router) whereas 50% of the same use data/voice SIM.

The average monthly expenditure on dedicated data SIMs is estimated to be SAR 150/- per user. The average perception of mobile Internet pricing for dedicated data SIM is found to be above Acceptable (3.09) as well as the level of satisfaction with regards to services is also above Acceptable (i.e. a score above Acceptable).

---

1- See Appendix B: For the Definition Used of Internet User and note that the target respondents are aged between 12 and 65 years.
of 3.6 on a scale of 5). On the other hand, the average perception of mobile Internet pricing for data/voice data SIM is found to be Below Acceptable (2.83) whereas the level of satisfaction with regards to services is Above Acceptable (i.e. a score of 3.39 on a scale of 5).

For users that use Internet at home, 58% access Internet through 3G/4G router while 40% access Internet through DSL/FTTH technologies. The average perception of pricing for Internet at home (using DSL, FTTH etc.) is found to be slightly Below Acceptable (2.92), while the level of satisfaction with regards to services is Above Acceptable (3.59). The average perception of Internet at home (using 3G/4G router) pricing is found to be Acceptable (2.99) while the level of satisfaction with regards to services is Above Acceptable (3.46).

Computer devices (desktops/laptops/tablets) usage is found to be nearly 73% for the age-range (12-65). Users preferred to use laptops rather than desktops. Smartphones usage is increased dramatically. Nearly 73% of all respondents own smartphones. The usage of e-Banking is around 33%.

The use of online social networks is found to be nearly 91% among the respondents. WhatsApp, YouTube, Facebook, Twitter, and Instagram being the most widely used online social media with 42% of users always connected and respond as and when needed, while 43% spend 2 or more hours daily on social networking sites.

The analysis indicated that around 30% of all respondents have faced issues with their service providers, and only 71% of those registered complaints to the service providers. Furthermore, around 65% of the complainants received the complaint reference number. The overall level of satisfaction in handling complaint by service provider is Acceptable (i.e. a score of 3.2 on a scale of 5).

4% of all respondents complained to CITC. It is found that only about 19% of all respondents were aware of the fact that they can register complaint to CITC about 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 3.31 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 for 2015 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 for 2015. Wherever applicable, 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, 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 and 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 individual/household. Data collection activity commenced in first week.
of Feb-2015. The duration of data collection was about 3 months. 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.

Assurance of data quality was accomplished in two tiers. Surveyors’ supervisors checked the collected data at the end of the day for quality and consistencies. As a next step, the regional supervisors ensure the quality of the submitted data by checking the completed surveys and identifying data of inferior quality. On top of that, using the electronic tool, all the rules in the electronic questionnaire were embedded in such a way that no irrelevant questions or responses can be answered by respondent. Furthermore, call back technique was used for quality check and quality assurance purposes.

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. 3,000 samples were collected all over the Kingdom. For the current study, and based on recommendations, a quota of approx. 29% was achieved for the responses from households².

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

![Figure 1: Individuals and Households Ratio (Percentage of all respondents)](chart)

- Household Heads
- Individuals

---

29%
71%
Table 1: Sample Composition by Region (Percentage of all respondents)

<table>
<thead>
<tr>
<th>Regions</th>
<th>% of Total Samples³</th>
</tr>
</thead>
<tbody>
<tr>
<td>Al-Riyadh</td>
<td>29.70%</td>
</tr>
<tr>
<td>Makkah Al-Mokarramah</td>
<td>25.93%</td>
</tr>
<tr>
<td>Al-Madinah Al-Monawarah</td>
<td>4.49%</td>
</tr>
<tr>
<td>Al-Qaseem</td>
<td>4.06%</td>
</tr>
<tr>
<td>Eastern Region</td>
<td>16.85%</td>
</tr>
<tr>
<td>Aseer</td>
<td>4.62%</td>
</tr>
<tr>
<td>Tabouk</td>
<td>2.72%</td>
</tr>
<tr>
<td>Hayel</td>
<td>1.54%</td>
</tr>
<tr>
<td>Northern Borders</td>
<td>0.79%</td>
</tr>
<tr>
<td>Jazan</td>
<td>4.59%</td>
</tr>
<tr>
<td>Najran</td>
<td>1.77%</td>
</tr>
<tr>
<td>Al-Baha</td>
<td>1.47%</td>
</tr>
<tr>
<td>Al- Jouf</td>
<td>1.47%</td>
</tr>
</tbody>
</table>

Table 2: Sample Composition by Nationality and Gender (Percentage of all respondents)

<table>
<thead>
<tr>
<th>Gender Nationality</th>
<th>Male</th>
<th>Female</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saudi</td>
<td>34.89%</td>
<td>27.65%</td>
<td>62.54%</td>
</tr>
<tr>
<td>Expatriates</td>
<td>27.89%</td>
<td>9.57%</td>
<td>37.46%</td>
</tr>
<tr>
<td>Total</td>
<td>62.78%</td>
<td>37.22%</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

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.
Table 3: Sample Composition by Age-Group (Percentage of all respondents)

<table>
<thead>
<tr>
<th>Age-Groups</th>
<th>of Total Samples %</th>
</tr>
</thead>
<tbody>
<tr>
<td>years 12-19</td>
<td>12.07%</td>
</tr>
<tr>
<td>years 20-29</td>
<td>37.60%</td>
</tr>
<tr>
<td>years 30-39</td>
<td>28.62%</td>
</tr>
<tr>
<td>years 40-49</td>
<td>13.77%</td>
</tr>
<tr>
<td>years 50-65</td>
<td>7.94%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Level of User Satisfaction</th>
<th>Score Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Good OR Very Satisfied</td>
<td>5</td>
</tr>
<tr>
<td>Good OR Satisfied</td>
<td>4</td>
</tr>
<tr>
<td>Acceptable OR Neutral</td>
<td>3</td>
</tr>
<tr>
<td>Poor OR Unsatisfied</td>
<td>2</td>
</tr>
<tr>
<td>Very Poor OR Very Unsatisfied</td>
<td>1</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Level of User Satisfaction</th>
<th>Score Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Cheap</td>
<td>5</td>
</tr>
<tr>
<td>Cheap</td>
<td>4</td>
</tr>
<tr>
<td>Acceptable</td>
<td>3</td>
</tr>
<tr>
<td>Expensive</td>
<td>2</td>
</tr>
<tr>
<td>Very Expensive</td>
<td>1</td>
</tr>
</tbody>
</table>

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
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. 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 nearly thrice that of fixed telephony.

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.

---

6- Please note that the Internet user is defined as a person who has used Internet at least once in the last six months.
Figure 5 shows the trend of use of ICT among households when compared to individuals.

**Figure 5: Comparison of ICT Usage between Households and Individuals**

<table>
<thead>
<tr>
<th>Service</th>
<th>Households</th>
<th>Individuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>87%</td>
<td>93%</td>
</tr>
<tr>
<td>Computer Device</td>
<td>85%</td>
<td>69%</td>
</tr>
<tr>
<td>Fixed Telephony</td>
<td>43%</td>
<td>40%</td>
</tr>
</tbody>
</table>
It is noted that the use of fixed telephony is popular among females, and Saudi nationals prefer to use it more as compared to expat residents. Mobile voice usage is uniform for both males and females and for both Saudis and Expatriates. The information is tabulated in Table 6.

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
<th>Saudi</th>
<th>Expat</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fixed Telephony</strong></td>
<td>37%</td>
<td>50%</td>
<td>53%</td>
<td>23%</td>
</tr>
<tr>
<td><strong>Mobile (Voice)</strong></td>
<td>99%</td>
<td>99%</td>
<td>99%</td>
<td>99%</td>
</tr>
<tr>
<td><strong>Internet</strong></td>
<td>88%</td>
<td>96%</td>
<td>95%</td>
<td>85%</td>
</tr>
</tbody>
</table>

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 as compared to Saudi nationals; as well for males as compared to females.
From Figure 7, it is clear that the usage of ICT is higher among females as compared to males.

**Figure 7: ICT Usage: Gender-wise**

- **Internet**
  - Male (1902): 88%
  - Female (1149): 96%

- **Mobile (Voice)**
  - Male (1902): 99%
  - Female (1149): 99%

- **Fixed Telephony**
  - Male (1902): 37%
  - Female (1149): 50%

**Figure 8: Trend of ICT Usage: Age-Groups**

- **Fixed Telephony**
  - 12-19 (363): 33%
  - 20-29 (1145): 32%
  - 30-39 (890): 40%

- **Mobile (Voice)**
  - 12-19 (363): 99%
  - 20-29 (1145): 99%
  - 30-39 (890): 100%
  - 40-49 (415): 97%

- **Internet**
  - 12-19 (363): 96%
  - 20-29 (1145): 96%
  - 30-39 (890): 95%
  - 40-49 (415): 95%
  - 50-65 Years (238): 45%
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 42% of all respondents use Fixed Telephony service at home.

Do not use Fixed Telephony: 58.00%
Use Fixed Telephony: 42.00%

Figure 9: Users of Fixed Telephony (Percentage of all respondents)

It is also observed that out of all households, 41% of households use fixed telephony service at home, as shown in Figure 10.

Do not use Fixed Telephony: 59.00%
Use Fixed Telephony: 41.00%

Figure 10: Users of Fixed Telephony (Percentage of Households)

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 (86%) mentioned that they are using mobile voice as an alternate service. While only 13% of them stated that the service is not available in their residential area.

---

7- Household refers to Head of the house who is a chief earner as well as do decisions related to ICT Services and Technologies.
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 153/- \(^8\). In calculating this average the numbers of household users who use fixed telephony as a part of bundled services are not taken into account.

---

Figure 11: Reasons for not using Fixed Telephony Services (Percentage of non-users of Fixed Telephony)

- Quality of service is not a good value for money: 1.40%
- Cost of service is not a good value for money: 2.99%
- Not Affordable: 7.39%
- Not Available: 13.42%
- Not Needed (Using mobile for voice calls): 89.23%

Figure 12: Average Monthly Spending on Fixed Telephony Users (Percentage of Households)

8- 29% who use service as part of bundled service are not included in calculation of the average.
8.1.4 **Satisfaction Rating for Fixed Telephony**

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

Below figure depicts the percentage of users with various levels of satisfaction with regard to fixed telephony services. Nearly 74% of the users are either 'satisfied' or 'very satisfied' with the service, while only 2% of the users are 'unsatisfied' or 'very unsatisfied'. The average satisfaction rating for fixed telephony service is nearly satisfied (3.84 out of 5).

![Figure 13: Overall Satisfaction for Fixed Telephony Services (Percentage of Fixed Telephony Users)](image-url)

Very unsatisfied: 0.19%
Unsatisfied: 1.92%
Neutral: 23.77%
Satisfied: 62.27%
Very satisfied: 11.84%

*Figure 13: Overall Satisfaction for Fixed Telephony Services (Percentage of Fixed Telephony Users)*
8.2 Mobile Voice Services

8.2.1 Use of Mobile Voice

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

Figure below depicts that 99% of all respondents use mobile voice (and messaging) services.

![Figure 14: Users of Mobile Voice (Percentage of all respondents)](image)

8.2.2 Subscription of Mobile Voice Services

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

80% of mobile voice users are having one or more mobile (voice) subscriptions under their own names, whereas 20% users are using mobile (voice) SIMs which are not subscribed under their names. It is noted that among the mobile (voice) users, the prepaid subscribers are 78%, whereas postpaid subscribers are 18%. It is further noted that the more percentage of Saudis subscribe to postpaid SIMs (23%) than expatriates (9%); whereas more percentage of expatriates (86%) subscribe to prepaid SIMs than Saudis (73%), as shown in the figure below.

![Figure 15: Mobile (Voice) Subscribers: Package-wise](image)
Following figure shows the distribution of users who subscribe with mobile (voice) service providers with single and multiple SIMs.

Figure 16: Percentage of Mobile (Voice) Subscribers: Nationality-wise

Following figure shows the distribution of users who subscribe with mobile (voice) service providers with single and multiple SIMs.

Figure 17: Mobile (Voice) Subscription: Package-wise
Why do you subscribe to more than one mobile line (for voice)? (Multiple Choice)

43% of those users who subscribe for multiple mobile (voice) services, subscribed for their family members, whereas nearly one-thirds (34%) subscribe different lines for business and personal uses.

![Figure 18: Reasons for subscribing more than one Mobile Line (Voice)
(Percentage of total subscribers of multiple lines)]

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Separate line for international calls</td>
<td>5.31%</td>
</tr>
<tr>
<td>Need an extra line for other purposes</td>
<td>7.19%</td>
</tr>
<tr>
<td>Subscribing for a person who cannot subscribe</td>
<td>10.27%</td>
</tr>
<tr>
<td>Separate lines for business and personal use</td>
<td>34.25%</td>
</tr>
<tr>
<td>Separate lines for family members</td>
<td>42.81%</td>
</tr>
<tr>
<td>Take advantage of promotion/offers</td>
<td>44.86%</td>
</tr>
</tbody>
</table>

8.2.3 Users of Mobile Voice Services

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

It is noted that 95% of mobile (voice) users use prepaid SIMs, while 18% use postpaid SIMs.

![Figure 19: Mobile (Voice) Usage: Package-wise](Prepaid Users: 95.30%, Postpaid Users: 17.64%)
It is further noted that the more percentage of Saudis use postpaid SIMs (23%) than expatriates (9%), whereas more percentage of expatriates (98%) use prepaid SIMs than Saudis (92%), as shown in the figure below.

![Figure 20: Mobile (Voice) Usage: Nationality-wise Distribution of No. of SIMs in Use](image)

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

Nearly half of the users (53%) use multiple mobile (voice) lines for business and personal uses while 60% use multiple lines to take advantage of promotions/offers.

![Figure 21: Reasons for using more than one Mobile Line (Voice) (Percentage of users of multiple lines)](image)
8.2.4 **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 (74%) spent between SAR. 51-400 per month for mobile line (voice and messaging) services. The average monthly spending on mobile (voice) services for 2015 is estimated to be SAR. 187/-. In calculating this average the numbers of users who use mobile voice as a part of bundled services are not taken into account.

![Figure 22: Average Monthly Spending on Mobile Voice Services for Primary Line](image)

8.2.5 **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 (2.8 out of 5). As depicted in figure below, on an average, off-net calls, calls to international destinations, and roaming service received expensive price ratings.
8.2.6 **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 (3.61 out of 5). Figure below shows the results of satisfaction rating for all mobile (voice) services for primary line.

*where 5 being 'Very Cheap' and 1 being 'Very Expensive'*

**Figure 23: Price Rating for Mobile (Voice) Services for Primary Line***
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 11% 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 24: Satisfaction Rating for Mobile (Voice) Services for Primary Line

*where 5 being 'Very Satisfied' and 1 being 'Very Unsatisfied'

Figure 25: Users Considering Changing Mobile Service Provider (Voice) (Percentage of mobile voice users)
Why would you consider changing your mobile service provider (for voice)? (Multiple Choice)

Figure 26: Reasons for Changing Mobile (Voice) Service Provider (Percentage of Users considering changing Service Provider)

- for better quality of customer care: 26.01%
- for availability of more services and bundled service packages: 37.57%
- for better quality of service: 42.20%
- for better service coverage: 46.82%
- for lower rates offered by competition: 69.36%
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 below shows the trend of Internet usage within the past couple of months.

<table>
<thead>
<tr>
<th>Last Internet Use</th>
<th>of all Respondents %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within the last month</td>
<td>89.77%</td>
</tr>
<tr>
<td>Within the last 3 months</td>
<td>0.98%</td>
</tr>
<tr>
<td>Within the last 6 months</td>
<td>0.36%</td>
</tr>
<tr>
<td>Within the last 12 months</td>
<td>0.13%</td>
</tr>
<tr>
<td>Not used Within the last 12 months</td>
<td>0.49%</td>
</tr>
<tr>
<td>Never used Internet</td>
<td>8.26%</td>
</tr>
</tbody>
</table>

Therefore, based on the definition, 91% of all the respondents (aged between 12-65 years) used Internet at least once in the last 6 months. Only 9% 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.

Do not use Internet 8.88%

Use Internet 91.12%

Figure 27: Internet Users (Percentage of all respondents)
Figures below show the Internet usage patterns for respondents from employment types and education levels.

**Figure 28: Internet Users: Employment-wise**

- Retired (19): 73.68%
- Self-employed (179): 83.11%
- Unemployed (91): 86.96%
- Employed with a company (1196): 87.52%
- Homemaker/ Housewife (383): 92.15%
- Employed with Government (374): 94.59%
- Student (723): 97.96%

**Figure 29: Internet Users: Education-wise**

- University education: PhD [15]: 100.00%
- University education: Master’s degree [145]: 97.93%
- University education: Bachelor’s degree [1214]: 98.87%
- Diploma education [235]: 95.00%
- Secondary school education [704]: 94.14%
- Intermediate school education [358]: 84.64%
- Elementary school education [217]: 67.89%
- No formal education but can read and write [88]: 83.20%
- No formal education and cannot read and write [22]: 4.35%

10% - 57.14% of respondents who answered “Other” (147) are also Internet users, not shown.
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, 53% of those having primary reason for not using it was lack of knowledge of using it.

![Figure 30: Reasons for not using Internet in the last six (6) months (Percentage of non-users of Internet)](image)

Don’t know how to use Internet: 53.14%
Not available: 24.72%
Don’t know what Internet is: 19.56%
Not affordable: 12.18%
Don’t know how to get an Internet connection: 8.49%
My family does not allow: 2.58%

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

Among non-users, only 17% of the respondents are planning to use Internet within the next 6 months.

![Figure 31: Planning to use Internet in the next six (6) months (Percentage of non-users of Internet)](image)

No: 83.00%
Yes: 17.00%
Which of the following service(s)/application(s) do you use? (Multiple Choice)

This question is asked to non-users of Internet to check the unawareness of them. 7% of non-users use the Internet without any knowledge of the Internet technologies. Interestingly, some respondents actually use one or more common online applications/services without being aware that they are using Internet. This came into notice as a result of a validation question where 7% of the non-users mentioned using one or more of these online applications/services: WhatsApp, Facebook, Twitter, YouTube, Google Maps, Dropbox, Google, Skype, TuneIn, Online games and Web TV.
Where do you usually use the Internet? (Multiple Choice)

The most common place to use Internet among the respondents is at home (78%), followed by public places (47%) as shown in Figure 35. Furthermore, Figure 36 and Figure 37 show the results of respondents who use Internet at different places with reference to their gender and age-group.
Figure 36: Place of using Internet: Gender-wise

![Graph showing the place of using Internet by gender.]

Figure 37: Place of using Internet: Age-Group

![Graph showing the place of using Internet by age group.]

![Table showing the place of using Internet by age group.]

<table>
<thead>
<tr>
<th>Place of Education</th>
<th>50-65 (238)</th>
<th>40-49 (415)</th>
<th>30-39 (690)</th>
<th>20-29 (1145)</th>
<th>12-19 (363)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workplace</td>
<td>34.45%</td>
<td>52.29%</td>
<td>50.67%</td>
<td>36.86%</td>
<td>6.06%</td>
</tr>
<tr>
<td>Place of education</td>
<td>2.10%</td>
<td>3.13%</td>
<td>8.31%</td>
<td>22.01%</td>
<td>27.55%</td>
</tr>
<tr>
<td>Another person’s home</td>
<td>11.34%</td>
<td>19.52%</td>
<td>27.75%</td>
<td>35.72%</td>
<td>27.55%</td>
</tr>
<tr>
<td>Public places</td>
<td>17.65%</td>
<td>27.23%</td>
<td>44.38%</td>
<td>51.79%</td>
<td>45.45%</td>
</tr>
<tr>
<td>Restaurants/Coffee Shops</td>
<td>8.40%</td>
<td>13.01%</td>
<td>16.97%</td>
<td>24.80%</td>
<td>23.42%</td>
</tr>
<tr>
<td>Internet Cafes</td>
<td>1.26%</td>
<td>2.17%</td>
<td>3.93%</td>
<td>6.38%</td>
<td>9.64%</td>
</tr>
<tr>
<td>Home</td>
<td>86.55%</td>
<td>83.37%</td>
<td>80.22%</td>
<td>81.05%</td>
<td>87.88%</td>
</tr>
</tbody>
</table>
9.1.4 Time Spent on Internet

How many hours a day, on an average, do you actively use Internet? (Single Choice)

It is observed that 87% of Internet users spend 2 or more hours daily on Internet.

![Figure 38: Time Spent on Internet – Active Usage (Percentage of Internet Users)](image)

Figure 39 and Figure 40 show Internet usage pattern among nationality and gender respectively. It is noted that the Saudis, in general, spend more time daily on Internet than expatriates, while females are more heavy users of Internet than males.

![Figure 39: Time Spent on Internet – Active Usage: Nationality-wise](image)
It is noted in Figure 41 that the highest usage percentage of Internet is among respondents aged between 20 and 29 years.
Below figure shows Internet usage pattern among respondents (employment-wise).

**Figure 42: Time Spent on Internet – Active Usage: Employment-wise**
9.2 Internet Services at Home

9.2.1 Use of Internet at Home

The Internet usage at home is found to be 78% of all users.

Figure 43: Users of Internet at Home (Percentage of all respondents)

<table>
<thead>
<tr>
<th>No</th>
<th>22.00%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>78.00%</td>
</tr>
</tbody>
</table>

Figure 44: Users of Internet at Home (Percentage of Internet Users)

<table>
<thead>
<tr>
<th>No</th>
<th>14.00%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>86.00%</td>
</tr>
</tbody>
</table>

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

Below figure shows the penetration of different types of Internet access methods at home. Mobile Internet (3G/4G) Router is the dominant access type; with 58% of Internet users are using it at Home.

Figure 45: Type of Internet Access Method at Home (Percentage of Internet Users at Home)

- Mobile Internet (3G/4G) Router at Home: 58.39%
- DSL: 34.92%
- Fiber to the home (FTTH): 4.95%
- I don’t know: 3.39%
- Dial-up: 1.25%
- WiMAX: 0.18%
Figure 46 through Figure 49 show the Internet usage at home among different regions, nationalities, genders, and age-groups respectively. It is interesting to note that females (91%) use more Internet at home services than males (75%) whereas Saudis (87%) use Internet at home more than expatriates (75%). It is also found that 88% of people, in age-group 12-19, use Internet at home services more than other age-groups.
9.2.2 Reasons for not using Internet at Home

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

- I don’t need Internet at home, because I use Mobile Internet: 76.58%
- I don’t need Internet at home, because I use Internet at my workplace: 17.84%
- Not available: 6.88%
- Not affordable: 6.88%
- I don’t need Internet at home, because I use Internet at a public Place: 5.20%
- I don’t Know how to have Internet connection: 3.16%
- I don’t use it because of family concerns: 0.56%

Figure 49: Users of Internet at Home: Age-Group

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-19 (362)</td>
<td>87.88%</td>
</tr>
<tr>
<td>20-29 (1127)</td>
<td>81.05%</td>
</tr>
<tr>
<td>30-39 (858)</td>
<td>80.22%</td>
</tr>
<tr>
<td>40-49 (413)</td>
<td>83.37%</td>
</tr>
<tr>
<td>50-65 years (238)</td>
<td>86.55%</td>
</tr>
</tbody>
</table>

Figure 50: Reasons for not using Internet at Home (Percentage of non-users of Internet at home)
9.2.3 Internet Activities that users do at Home

For which of the following activities do you access Internet from home?

- Web browsing: 90.01%
- Visit Social Networking Sites: 85.15%
- Getting information about goods or services: 61.73%
- Sending or receiving e-mail: 53.30%
- Playing or downloading video games and movies etc.: 49.64%
- Reading news and newspaper: 43.13%
- Education or learning activities: 26.05%
- Posting information or instant messaging: 23.15%
- Internet banking: 17.62%
- Purchasing or ordering goods or services: 15.52%
- Video Conferencing: 6.47%

Figure 51: Internet Activities done at Home (Percentage of Internet users at Home)

9.2.4 Internet at Home using 3G/4G Service

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

How much do you spend monthly, on an average, for primary Internet service at home?

The below figure shows 89% of the household heads spend between SAR 100-200 monthly. The average monthly spending on Internet services at Home using 3G/4G services is estimated to be SAR. 157/-.
Price Rating for Internet at Home

Please rate the price of your primary Internet service at home.

The average price rating for Internet at home using 3G/4G Router is acceptable (2.99 out of 5).

Figure 52: Average Monthly Spending on Internet at Home using 3G/4G Router (Percentage of Households using the service) 11

Figure 53: Price Rating for Internet at Home (for 3G/4G service)

11- Respondents who answered “I don’t know” – 10.75% are not included in calculation.
Satisfaction Rating for Internet at Home

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

The average satisfaction score for Internet at home using 3G/4G Router is above acceptable (3.46 out of 5). Below Figure shows the average satisfaction levels scores for different services.

*where 5 being Very Satisfied and 1 being Very Unsatisfied

**Figure 54: Satisfaction Rating for Internet Users at Home (for 3G/4G service)**

9.2.5 **Internet at Home using Other Services (DSL, FTTH, and WiMAX)**

**Figure 55: Distribution of Internet Users at Home using DSL/FTTH/WiMAX (Percentage of Internet users at Home using DSL/FTTH/WiMAX as Primary ISP)**
Type(s) of Internet Access(es) at Home

Please describe the subscribed bandwidth, at home (Connection Bandwidth not Download Limit)

Below figures show the subscribed bandwidth for DSL and FTTH technologies. Figure 56 shows that 26% of users subscribed to 4Mbps speed, whereas Figure 57 shows that the 55% of users of FTTH subscribe to 25Mbps.

### Figure 56: Subscribed Bandwidth for DSL. (Percentage of DSL Users)

- 4 Mbps: 25.61%
- 2 Mbps: 7.77%
- 20 Mbps: 11.31%
- 10 Mbps: 17.71%

### Figure 57: Subscribed Bandwidth for FTTH (Percentage of FTTH Users)

- 50 Mbps: 1.89%
- 25 Mbps: 54.72%
- 20 Mbps: 24.53%
- 40 Mbps: 2.83%
- 200 Mbps: 4.72%
- 100 Mbps: 8.49%
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 on Internet services at home using DSL, FTTH, and WiMAX services is estimated to be SAR. 219/-.

![Figure 58: Average Monthly Spending on Internet at Home using DSL/FTTH/WiMAX (Percentage of Households using the service)](image)

Price Rating for Internet at Home

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

Figure 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 DSL/FTTH/WiMAX service as slightly below acceptable (2.92 out of 5).

![Figure 59: Price Rating for Internet at Home (for DSL/FTTH/WiMAX)](image)

12% respondents answered "I don't know" are not shown.
Satisfaction Rating for Internet at Home

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

The average satisfaction score for Internet at Home using DSL/FTTH/WiMAX service is above acceptable (3.59 out of 5). Below Figure shows the average satisfaction levels scores for different services.

![Bar chart showing satisfaction ratings for different services](image)

*where 5 being Very Satisfied and 1 being Very Unsatisfied

**Figure 60: Satisfaction Rating for Internet Users at Home (for DSL/FTTH/WiMAX)**

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

![Bar chart showing plans for Internet upgrades](image)

**Figure 61: Planning to increase Internet Speed in the next 12 months (Percentage of Internet users at Home)**
9.3 Mobile Internet Services

9.3.1 Use of Mobile Internet

When was the last time you used mobile Internet? (Excluding Mobile Internet (3G/4G) Router at Home) (Single Choice)

Mobile Internet usage from smart devices having data/voice or dedicated data SIM is found to be 82% in the last six (6) months. Respondents who access Internet through 3G/4G Router at Home are not included here. It is found that mobile Internet deployment all over the Kingdom is same.

Table 8: Last Use of Mobile Internet (excluding 3G/4G Router)

<table>
<thead>
<tr>
<th>Last Internet Use</th>
<th>of all Respondents %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within the last month</td>
<td>78.81%</td>
</tr>
<tr>
<td>Within the last 3 months</td>
<td>2.75%</td>
</tr>
<tr>
<td>Within the last 6 months</td>
<td>0.44%</td>
</tr>
<tr>
<td>Within the last 12 months</td>
<td>0.10%</td>
</tr>
<tr>
<td>Not used Within the last 12 months</td>
<td>0.46%</td>
</tr>
<tr>
<td>Never used Internet</td>
<td>17.44%</td>
</tr>
</tbody>
</table>

Below figures show the mobile Internet usage among different nationalities, gender and age-groups. It is to be noted here that the target respondents were aged from 12 to 65 years old. It is interesting to note that Females (78%) use more mobile Internet services than Males (72%) whereas Saudis (80%) use more Mobile Internet when compared to expatriates (66%).

13- Internet users who answered this question were aged from 12 to 65 years old.
Figure 63: Mobile Internet Usage (Excluding Mobile Internet 3G/4G Router): Nationality-wise

- Expat (11123): 65.70%
- Saudi (1875): 80.10%

Figure 64: Mobile Internet Usage (Excluding Mobile Internet 3G/4G Router): Gender-wise

- Female (1116): 78.36%
- Male (1882): 72.48%

Figure 65: Mobile Internet Usage (Excluding Mobile Internet 3G/4G Router): Age-Group

- 20-29 (1127): 76.42%
- 30-39 (858): 71.01%
- 40-49 (413): 65.30%
- 50-65 years (238): 47.90%
- 12-19 (362): 61.71%

Figure 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.
9.3.2 Reasons for not using Mobile Internet Services

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Affordable</td>
<td>3.01%</td>
</tr>
<tr>
<td>Handset is not compatible</td>
<td>1.96%</td>
</tr>
<tr>
<td>I am not aware of Mobile Internet services</td>
<td>6.02%</td>
</tr>
<tr>
<td>Difficult to use</td>
<td>0.75%</td>
</tr>
<tr>
<td>I don’t know how to use it</td>
<td>6.78%</td>
</tr>
<tr>
<td>I don’t need mobile Internet services</td>
<td>87.95%</td>
</tr>
</tbody>
</table>

Figure 66: Reasons for not using Mobile Internet Services (Percentage of non-users of Mobile Internet)

9.3.3 Subscription of Mobile Internet Services

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

Subscribers: 60.00%
Non-Subscribers: 40.00%

Figure 67: Mobile Internet Subscribers (Excluding Mobile Internet 3G/4G Router) (Percentage of mobile Internet users)
9.3.4  **Type of Mobile Internet Access being used**

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

![Type of Mobile Internet SIM Used](Percentage of mobile Internet subscribers)

Figure below shows that most of the users use single mobile Internet SIM.

![Internet Activities using Mobile Internet Services](Single SIM vs. Multiple SIMs)

9.3.5  **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.
9.3.6 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 (Dedicated Data SIM)? (Single Choice)

The average monthly spending on mobile Internet services for Dedicated Data SIMs (Excluding Mobile Internet 3G/4G Router) is estimated to be SAR. 150/-.

Visit Social Networking Sites: 82.23%
Web browsing: 66%
Getting information about goods or services: 37%
Sending or receiving e-mail: 46%
Reading news and newspaper: 29.73%
Education or learning activities: 15.22%
Internet banking: 20%
Purchasing or ordering good or services: 9.69%
Video Conferencing: 4.30%

Figure 71: Average Monthly Spending on Mobile Internet Services (Excluding Mobile Internet 3G/4G Router) (Dedicated Data SIM)
9.3.7 **Price Rating for Mobile Internet Services for Primary Line (Dedicated Data SIM)**

Please rate the price of your primary mobile Internet services subscription for following (Dedicated Data SIM).

The average price rating for mobile Internet services for Dedicated Data SIMs is above acceptable (3.09 out of 5).

![Price Rating Chart](chart.png)

**Figure 72:** Price Rating for Mobile Internet Services (Dedicated Data SIM) (Excluding Mobile Internet 3G/4G Router)
9.3.8 **Satisfaction Rating for Mobile Internet Services for Primary Line**

Please rate your satisfaction with your primary mobile Internet services subscription for the following (Dedicated Data SIM).

The average satisfaction score for mobile Internet services for Dedicated Data SIM is above acceptable (3.6 out of 5). Below figure shows the average satisfaction levels scores for different services.

*where 5 being ‘Very Satisfied’ and 1 being ‘Very Unsatisfied’

<table>
<thead>
<tr>
<th>Service</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Services support</td>
<td>3.528</td>
</tr>
<tr>
<td>Coverage in your area</td>
<td>3.558</td>
</tr>
<tr>
<td>Ease of cancelling mobile service(s)</td>
<td>3.585</td>
</tr>
<tr>
<td>Ease of obtaining mobile service(s)</td>
<td>3.646</td>
</tr>
<tr>
<td>Internet speed and response</td>
<td>3.653</td>
</tr>
</tbody>
</table>

**Figure 73: Overall Satisfaction Rating for different Mobile Internet Services (Excluding Mobile Internet 3G/4G Router)**
10. **Services Packages**

10.1 **Types of Bundled Services**

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

It is found that 7% of bundled services users subscribed to fixed Telephony with fixed Internet packages while 67% of them are subscribed to mobile voice with mobile Internet packages.

![Figure 74: Types of Bundled Services use (Percentage of Users)](image)

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile Voice with Mobile Internet subscription</td>
<td>67.30%</td>
</tr>
<tr>
<td>Fixed Telephony with Fixed Internet subscription</td>
<td>6.63%</td>
</tr>
<tr>
<td>Smartphone device with Mobile Voice and/or Mobile</td>
<td>1.63%</td>
</tr>
<tr>
<td>Fixed Telephony with IPTV and Fixed Internet subscription</td>
<td>1.54%</td>
</tr>
</tbody>
</table>

10.2 **Reasons for not using Bundled Services**

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

Nearly 58% of respondents who don’t use bundles services indicate that they don’t need bundled services while 28% of respondents are not aware of bundled services.

![Figure 75: Reasons for not using Bundled Services (Percentage of non-users of bundled services)](image)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weak customer support</td>
<td>4.15%</td>
</tr>
<tr>
<td>Difficult to use</td>
<td>4.25%</td>
</tr>
<tr>
<td>Not affordable</td>
<td>7.08%</td>
</tr>
<tr>
<td>Difficult to understand/choose</td>
<td>7.13%</td>
</tr>
<tr>
<td>I don’t know how to obtain bundled services</td>
<td>15.53%</td>
</tr>
<tr>
<td>I am not aware of package deals offered (bundled services)</td>
<td>27.62%</td>
</tr>
<tr>
<td>I don’t need bundled services</td>
<td>58.22%</td>
</tr>
</tbody>
</table>

14- For Fixed Telephony, spending question was asked to Household heads only.
15- For Mobile Voice with Mobile Internet and smartphone package questions were asked to mobile voice and Internet users.
10.3 Average Monthly Spending on Service Packages

10.3.1 Mobile Voice/Internet Service Packages

How much do you spend monthly, on an average, for Mobile Voice with Mobile Internet subscription bundled services? (Single Choice)

![Figure 76: Average Monthly Spending on Mobile Voice with Mobile Internet subscription](image)

10.4 Price Rating for Service Packages

Please rate the price of the following services:

Price satisfaction for smartphone device with subscription(s) is below acceptable (2.688 out of 5), mobile voice with Internet is as well below acceptable (2.825 out of 5), fixed telephony with fixed Internet is acceptable (3.027 out of 5), and fixed telephony with IPTV and fixed Internet is nearly acceptable (2.941 out of 5).

![Figure 77: Price Satisfaction for Types of Service Packages](image)

*where 5 being 'Very Cheap' and 1 being 'Very Expensive'

16- 8.77% respondents who answered “I don’t know” are not included in calculation.
10.5 **Satisfaction Rating for Service Packages**

Please rate your overall satisfaction with each of the following services:

Overall satisfaction for smartphone device with subscription(s) is above acceptable (3.25 out of 5), mobile voice with Internet is above acceptable (3.389 out of 5), fixed telephony with fixed Internet is near to satisfied (3.676 out of 5), and fixed telephony with IPTV and fixed Internet is acceptable (3.176 out of 5).

*where 5 being ‘Very Satisfied’ and 1 being ‘Very Unsatisfied’*

![Figure 78: Overall Satisfaction for Types of Service Packages](image)

10.6 **Dissatisfaction with Service Packages**

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

Below figure shows reasons for dissatisfaction with the different types of bundled services. Those users who are dissatisfied with the fixed telephony with fixed Internet subscription, 63% of them mentioned that the service has no value for money. While for fixed telephony with IPTV and fixed Internet subscription, 67% mentioned that they are not utilizing all services.

![Figure 79: Reasons for dissatisfaction with the bundled services (Percentage of unsatisfied users)](image)
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 Figure 80 that 73% of the respondents use computer devices such as desktop, laptop or tablet. Figure 81 through Figure 83 show results of computer usage for demographic factors such as nationality, gender, and age respectively.

It is found that Saudis use more computer devices than Expatriates. On the other hand, males use them more than females. Respondents between ages 12-29 use the computer devices more than any other age-group.

![Figure 80: Users of Computers (desktop/laptop/tablets) (Percentage of all respondents)](image1)

![Figure 81: Users of Computers (desktop/laptop/tablets): Nationality-wise](image2)

![Figure 82: Users of Computers (desktop/laptop/tablets): Gender-wise](image3)
Figure 83: Users of Computers (desktop/laptop/tablets): Age-Group

Do you own or use any of the following devices?

- **Smartphone(s):** 73%
- **Tablet(s):** 30%
- **Laptop(s):** 55%
- **Desktop PC(s):** 15%

Figure 84: Owner of Computers (desktop/laptop/tablets) (Percentage of all respondents)

- **Smartphone(s):** 80%
- **Tablet(s):** 31%
- **Laptop(s):** 59%
- **Desktop PC(s):** 20%

Figure 85: Users of Devices (Percentage of all 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 86: Users' Preferred Languages (Percentage of computer users)](image)

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 66% of respondents who don’t use computers mentioned that they don’t need computer devices (desktop/laptop/tablets).

![Figure 87: Reasons for not using Computers (desktop/laptop/tablets) (Percentage of non-users of computers)](image)

17- Less than 0.5% 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)

Following figure identifies the list of activities which users usually do when using computer devices (desktop, laptop, and tablet).

**Figure 88:** List of Activities done using Computers (Percentage of computer users)

Figures below show the activity patterns according to nationality, gender, age-group, employment type, and education level.

**Figure 89:** List of Activities done using Computers: Nationality-wise
<table>
<thead>
<tr>
<th>Activity</th>
<th>Male (1902)</th>
<th>Female (1149)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surf the Internet</td>
<td>42.82%</td>
<td>49.42%</td>
</tr>
<tr>
<td>Stare personal documents</td>
<td>36.55%</td>
<td>45.58%</td>
</tr>
<tr>
<td>Listening to audio or for watching movies</td>
<td>34.64%</td>
<td>42.85%</td>
</tr>
<tr>
<td>Communicate with people via internet Email/Instant</td>
<td>35.49%</td>
<td>40.80%</td>
</tr>
<tr>
<td>Office/education related work</td>
<td>29.42%</td>
<td>39.27%</td>
</tr>
<tr>
<td>Play games</td>
<td>16.45%</td>
<td>27.87%</td>
</tr>
</tbody>
</table>

Figure 90: List of Activities done using Computers: Gender-wise
Figure 91: List of Activities done using Computers: Age-Group

<table>
<thead>
<tr>
<th>Age-Group</th>
<th>Play games</th>
<th>Office/education related work</th>
<th>Communicate with people via Internet (Email/Instant Messaging)</th>
<th>Listening to audio or for watching movies</th>
<th>Store personal documents</th>
<th>Surf the Internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>50-65 Years (238)</td>
<td>4.88%</td>
<td>21.12%</td>
<td>23.84%</td>
<td>13.34%</td>
<td>22.60%</td>
<td>26.09%</td>
</tr>
<tr>
<td>40-49 (415)</td>
<td>13.88%</td>
<td>37.06%</td>
<td>38.60%</td>
<td>30.06%</td>
<td>41.04%</td>
<td>44.96%</td>
</tr>
<tr>
<td>30-39 (890)</td>
<td>19.11%</td>
<td>33.96%</td>
<td>36.47%</td>
<td>35.36%</td>
<td>40.56%</td>
<td>43.90%</td>
</tr>
<tr>
<td>20-29 (1145)</td>
<td>27.64%</td>
<td>38.15%</td>
<td>45.38%</td>
<td>48.87%</td>
<td>47.35%</td>
<td>53.14%</td>
</tr>
<tr>
<td>12-19 (363)</td>
<td>53.11%</td>
<td>37.38%</td>
<td>31.46%</td>
<td>53.90%</td>
<td>43.38%</td>
<td>49.51%</td>
</tr>
</tbody>
</table>
Figure 92: List of Activities done using Computers: Employment-use
Figure 93: List of Activities done using Computers: Education-wise

<table>
<thead>
<tr>
<th>Education</th>
<th>Play games</th>
<th>Office/education related work</th>
<th>Communicate with people via Internet/Email/Instant Messaging</th>
<th>Listening to audio or for watching movies</th>
<th>Store personal documents</th>
<th>Surf the Internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>University education: PhD (15)</td>
<td>6.67%</td>
<td>86.67%</td>
<td>73.33%</td>
<td>20.00%</td>
<td>80.00%</td>
<td>80.00%</td>
</tr>
<tr>
<td>University education: Master’s degree (145)</td>
<td>40.00%</td>
<td>76.55%</td>
<td>81.38%</td>
<td>71.03%</td>
<td>84.14%</td>
<td>83.45%</td>
</tr>
<tr>
<td>University education: Bachelor’s degree (1236)</td>
<td>28.16%</td>
<td>49.19%</td>
<td>51.05%</td>
<td>48.95%</td>
<td>53.72%</td>
<td>59.87%</td>
</tr>
<tr>
<td>Diploma certification (250)</td>
<td>16.00%</td>
<td>32.00%</td>
<td>38.80%</td>
<td>33.20%</td>
<td>42.00%</td>
<td>42.00%</td>
</tr>
<tr>
<td>Secondary school education (717)</td>
<td>21.34%</td>
<td>26.08%</td>
<td>31.10%</td>
<td>35.43%</td>
<td>34.59%</td>
<td>41.56%</td>
</tr>
<tr>
<td>Intermediate school education (358)</td>
<td>21.79%</td>
<td>17.04%</td>
<td>23.74%</td>
<td>31.56%</td>
<td>27.65%</td>
<td>31.28%</td>
</tr>
<tr>
<td>Elementary school education (218)</td>
<td>17.43%</td>
<td>11.01%</td>
<td>10.09%</td>
<td>20.18%</td>
<td>15.14%</td>
<td>16.97%</td>
</tr>
<tr>
<td>No formal education but can read and write (89)</td>
<td>3.37%</td>
<td>1.12%</td>
<td>2.25%</td>
<td>7.87%</td>
<td>4.49%</td>
<td>7.87%</td>
</tr>
<tr>
<td>No formal education and cannot read and write (23)</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>4.35%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
</tbody>
</table>
11.4 Frequency of Changing Mobile Handsets

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

Nearly 30% of users who owned mobile handsets including smartphones change their handsets in 1-2 years.

![Figure 94: Frequency of changing Mobile Handsets (Percentage of users)](image)

Below figures show the trends of users changing mobile handsets over the period of time according to nationality, gender, and age-group respectively.

![Figure 95: Frequency of changing Mobile Handsets: Nationality-wise](image)
Figure 96: Frequency of changing Mobile Handsets: Gender-wise

Figure 97: Frequency of changing Mobile Handsets: Age-wise
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.

![Figure 98: Average Annual Spending on Mobile Handsets](image)

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 99: Computer and Internet Household Users](image)

18 - 20.84% respondents who answered “I don’t know” are not included in calculation.
12. Online Social Networks

12.1 Use of Online Social Networks

It is found that 91% of all respondents use online social networks.

![Figure 100](image_url)

**Figure 100:** Users of online Social Networking (Percentage of all respondents)

Below figure depicts that 99% of all Internet users use online social networks.

![Figure 101](image_url)

**Figure 101:** Users of online Social Networking (Percentage of Internet Users)

Below figure 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.

![Figure 102](image_url)

**Figure 102:** Users of online Social Networks: Nationality-wise
Below figure shows the users of online social networking according to the genders. It is revealed that both males and females use online social networks similarly.

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

It is observed that the top online social networking services/applications among the respondents are Whatsapp (89.21%), Youtube (75.79%), Facebook (59.50%), Twitter (47.48%) and Instagram (43.06%).

**Figure 104: Users distribution by Social Networks Sites (Percentage of online social networks’ Users)**
Below figure shows the users of Online Social Networking according to the nationalities.

**Figure 105: Users distribution of Online Social Networks (sites): Nationality-wise**

Below figure shows the users of Online Social Networking according to the genders.

**Figure 106: Users distribution of Online Social Networks (sites): Gender-wise**
[Figure 107: Users distribution by Online Social Networks (sites): Age-Group]

The diagram illustrates the percentage distribution of users across various online social networks and sites, categorized by age groups. The age groups represented are 50-65 years, 40-49, 30-39, 20-29, and 12-19.

- **Whatsapp**
- **Youtube**
- **Facebook**
- **Twitter**
- **Instagram**
- **Google+**
- **Snapchat**
- **Keek**
- **LinkedIn**
- **Telegram**
- **Path**

The data is presented in a bar chart format, showing the percentage of users in each age group for each social network. The chart indicates the popularity and usage trends across different age demographics for each platform.

**Table 1:** Users distribution by Online Social Networks (sites): Age-Group

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Path</th>
<th>Telegram</th>
<th>LinkedIn</th>
<th>Keek</th>
<th>Snapchat</th>
<th>Google+</th>
<th>Instagram</th>
<th>Twitter</th>
<th>Facebook</th>
<th>Youtube</th>
<th>Whatsapp</th>
</tr>
</thead>
<tbody>
<tr>
<td>50-65 years (238)</td>
<td>0.00%</td>
<td>0.84%</td>
<td>3.78%</td>
<td>1.26%</td>
<td>2.10%</td>
<td>15.55%</td>
<td>8.82%</td>
<td>16.39%</td>
<td>29.38%</td>
<td>32.77%</td>
<td>50.00%</td>
</tr>
<tr>
<td>40-49 (415)</td>
<td>0.72%</td>
<td>3.13%</td>
<td>6.75%</td>
<td>2.89%</td>
<td>7.47%</td>
<td>24.34%</td>
<td>20.00%</td>
<td>34.46%</td>
<td>45.06%</td>
<td>55.90%</td>
<td>70.60%</td>
</tr>
<tr>
<td>30-39 (890)</td>
<td>1.69%</td>
<td>10.00%</td>
<td>8.54%</td>
<td>6.18%</td>
<td>14.83%</td>
<td>27.19%</td>
<td>32.92%</td>
<td>40.90%</td>
<td>54.72%</td>
<td>72.02%</td>
<td>83.82%</td>
</tr>
<tr>
<td>20-29 (1145)</td>
<td>4.72%</td>
<td>9.52%</td>
<td>9.96%</td>
<td>10.83%</td>
<td>30.04%</td>
<td>28.91%</td>
<td>50.13%</td>
<td>51.62%</td>
<td>60.44%</td>
<td>78.60%</td>
<td>88.30%</td>
</tr>
<tr>
<td>12-19 (363)</td>
<td>5.51%</td>
<td>6.34%</td>
<td>2.75%</td>
<td>19.56%</td>
<td>33.33%</td>
<td>34.99%</td>
<td>62.26%</td>
<td>50.41%</td>
<td>59.78%</td>
<td>70.52%</td>
<td>85.57%</td>
</tr>
</tbody>
</table>

**Figure 107:** Users distribution by Online Social Networks (sites): Age-Group
Below figure shows the users of Online Social Networking according to the employment type.

**Figure 108: Users distribution by Online Social Networks (sites): Employment-wise**

<table>
<thead>
<tr>
<th>Path</th>
<th>Telegram</th>
<th>LinkedIn</th>
<th>Keek</th>
<th>Snapshot</th>
<th>Google+</th>
<th>Instagram</th>
<th>Twitter</th>
<th>Facebook</th>
</tr>
</thead>
<tbody>
<tr>
<td>30.000-50.000 (5)</td>
<td>4.35%</td>
<td>9.78%</td>
<td>7.61%</td>
<td>9.78%</td>
<td>27.17%</td>
<td>19.57%</td>
<td>53.26%</td>
<td>44.57%</td>
</tr>
<tr>
<td>20.001-30.000 (23)</td>
<td>0.00%</td>
<td>0.00%</td>
<td>5.26%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>5.26%</td>
<td>15.79%</td>
<td>36.84%</td>
</tr>
<tr>
<td>15.001-20.000 (66)</td>
<td>0.91%</td>
<td>8.68%</td>
<td>5.94%</td>
<td>3.65%</td>
<td>10.50%</td>
<td>14.61%</td>
<td>21.46%</td>
<td>31.96%</td>
</tr>
<tr>
<td>11.001-15.000 (143)</td>
<td>1.80%</td>
<td>6.70%</td>
<td>7.73%</td>
<td>10.82%</td>
<td>21.39%</td>
<td>31.70%</td>
<td>45.36%</td>
<td>62.11%</td>
</tr>
<tr>
<td>7.001-11.000 (326)</td>
<td>2.00%</td>
<td>3.58%</td>
<td>11.23%</td>
<td>7.15%</td>
<td>13.56%</td>
<td>36.52%</td>
<td>31.36%</td>
<td>35.77%</td>
</tr>
<tr>
<td>3.001-7.000 (753)</td>
<td>1.01%</td>
<td>11.14%</td>
<td>1.01%</td>
<td>2.03%</td>
<td>15.70%</td>
<td>10.13%</td>
<td>27.85%</td>
<td>30.89%</td>
</tr>
<tr>
<td>Less than SAR 3.000 (779)</td>
<td>6.93%</td>
<td>12.91%</td>
<td>6.39%</td>
<td>15.22%</td>
<td>37.64%</td>
<td>25.14%</td>
<td>59.10%</td>
<td>55.57%</td>
</tr>
</tbody>
</table>

52.17% | 50.52% | 64.39% | 52.66% | 32.66%
12.2 **Time Spent on Online Social Networks**

*How often do you use actively online social networks? (Single Choice)*

It is observed that 42% of users always connected and respond as and when needed, while 43% spend 2 or more hours daily on social networking sites.

**Figure 109: Time Spent on Online Social Networks**

Below figure shows the usage pattern of different nationalities on social networking sites.

**Figure 110: Time Spent on Online Social Networks: Nationality-wise**
Below figure shows the usage pattern of different genders on social networking sites.

**Figure 111: Time Spent on Online Social Networks: Gender-wise**

Below figure shows the usage pattern of respondents of different ages on social networking sites.

**Figure 112: Time Spent on Online Social Networks: Age-Group**
Below figure shows the usage pattern of respondents of different employment types on social networking sites.

![Time Spent on Online Social Networks: Employment-wise](image)

**Figure 113:** Time Spent on Online Social Networks: Employment-wise
Below figure shows the usage pattern of respondents of different education background on social networking sites.

![Figure 114: Time Spent on Online Social Networks: Education-wise](image-url)
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 Internet users who do not use online social networking have either no interest or lost interest in using online social networks.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No interest/Lost interest</td>
<td>64.21%</td>
</tr>
<tr>
<td>They are not useful</td>
<td>21.05%</td>
</tr>
<tr>
<td>They are not useful</td>
<td>21.05%</td>
</tr>
<tr>
<td>Lack of time</td>
<td>20.00%</td>
</tr>
<tr>
<td>Takes too much time to learn</td>
<td>13.68%</td>
</tr>
<tr>
<td>Concerns about privacy</td>
<td>9.47%</td>
</tr>
</tbody>
</table>

**Figure 115:** Reasons for not using Online Social Networks
13. **e-Services**

13.1 **Use of e-Services**

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

Below figure shows the distribution of users who use different e-Services. It is found that the most widely used e-Service is e-Banking.

![Bar Chart](image1)

**Figure 116: Users of different e-Services (Percentage of all respondents)**

Following figures show the trends of use of e-Service among different nationalities and gender. As indicated, the use of most of the listed e-Services is found to be more prevalent among Saudis than expatriates.

![Bar Chart](image2)

**Figure 117: Users of e-Services: Nationality-wise**
13.2 Reasons for not using e-Services

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

As shown in the below figure, 55% of non-users said that they don’t need to use any e-Service, while nearly 26% do not know how to use them.
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)

Following figure shows that 22% of users either purchase or place orders online to buy products and/or services.

**Figure 120: Users who purchase or place orders online (Percentage of all respondents)**

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

**Figure 121: Reasons for not Purchasing Products/Services over the Internet (Percentage of non-users of online-shopping)**
What types of purchases do you make over the Internet? (Multiple Choice)

Below figures show percentages of users who purchase tangible and non-tangible items over the Internet.

**Figure 122: Tangible Items purchased over the Internet (Percentage of online purchasers)**

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cloths, footwear and related accessories</td>
<td>62.11%</td>
</tr>
<tr>
<td>Computer, Smart devices and related accessories</td>
<td>59.19%</td>
</tr>
<tr>
<td>Cosmetics</td>
<td>17.11%</td>
</tr>
<tr>
<td>Books, Magazines or newspaper</td>
<td>6.80%</td>
</tr>
<tr>
<td>Appliances and furniture</td>
<td>15.61%</td>
</tr>
<tr>
<td>Food stuff</td>
<td>8.13%</td>
</tr>
</tbody>
</table>

**Figure 123: Non-tangible Items purchased over the Internet (Percentage of online purchasers)**

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flight or hotel booking and reservation</td>
<td>50.08%</td>
</tr>
<tr>
<td>Computer Software and Games</td>
<td>24.88%</td>
</tr>
<tr>
<td>Movies, TV shows, etc</td>
<td>15.61%</td>
</tr>
</tbody>
</table>
Below figures show percentages of users (nationality-wise) who purchase tangible and non-tangible items over the Internet.

Figure 124: Tangible Items purchased over the Internet: Nationality-wise

- Flight or hotel booking and reservation: 4.21% (Expat 0.79%, Saudi 3.42%)
- Computer, smart devices and related accessories: 4.91% (Expat 1.75%, Saudi 3.16%)
- Cosmetics: 1.75% (Expat 1.23%, Saudi 0.52%)
- Books, magazine or newspaper: 1.23% (Expat 0.79%, Saudi 0.44%)
- Appliances and furniture: 0.79% (Expat 0.79%, Saudi 0.00%)
- Food stuff: 2.15% (Expat 0.00%, Saudi 2.15%)
- Expats (1141) vs. Saudis (1910)

Figure 125: Non-tangible Items purchased over the Internet: Nationality-wise

- Flight or hotel booking and reservation: 4.21% (Expat 13.61%, Saudi 0.00%)
- Computer Software and Games: 1.31% (Expat 7.23%, Saudi 0.00%)
- Movies, TV shows, etc: 1.05% (Expat 4.40%, Saudi 0.00%)

Expats (1141) vs. Saudis (1910)
Following figures show percentages of users (gender-wise) who purchase tangible and non-tangible items over the Internet.

**Figure 126: Tangible Items purchased over the Internet: Gender-wise**

- **Cloths, footwear and related accessories**: Male (1902) - 15.32%, Female (1149) - 10.83%
- **Computer, smart devices and related accessories**: Male (1902) - 15.83%, Female (1149) - 5.48%
- **Cosmetics**: Male (1902) - 1.84%, Female (1149) - 13.05%
- **Books, magazines or newspaper**: Male (1902) - 3.39%, Female (1149) - 4.99%
- **Appliances and furniture**: Male (1902) - 2.09%, Female (1149) - 3.79%
- **Food stuff**: Male (1902) - 1.83%, Female (1149) - 1.52%

**Figure 127: Non-tangible Items purchased over the Internet: Gender-wise**

- **Flight or hotel booking and reservation**: Male (1902) - 11.99%, Female (1149) - 6.96%
- **Computer Software and Games**: Male (1902) - 6.89%, Female (1149) - 1.91%
- **Movies, TV shows, etc.**: Male (1902) - 4.00%, Female (1149) - 1.74%
### Use of Payment Method(s)

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

Below figure shows the percentage of respondents who use the various listed modes of online payment.

<table>
<thead>
<tr>
<th>Payment Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>e-Banking/SADAD</td>
<td>32.75%</td>
</tr>
<tr>
<td>e-Vouchers (e.g. Qitaf, One Card)</td>
<td>13.20%</td>
</tr>
<tr>
<td>Credit/Debit Card online</td>
<td>7.37%</td>
</tr>
<tr>
<td>e-Payment (e.g. Paypal)</td>
<td>2.42%</td>
</tr>
</tbody>
</table>

**Figure 128: Use of Online Payment Methods (Percentage of all respondents)**

On the other hand, following figure 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 (not shown), while e-Banking/SADAD is the most widely used mode.

<table>
<thead>
<tr>
<th>Payment Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit/Debit Card on Point of Sale (PoS)</td>
<td>28.66%</td>
</tr>
<tr>
<td>Cash on Delivery (CoD)</td>
<td>27.87%</td>
</tr>
<tr>
<td>Phone/SMS Banking</td>
<td>6.13%</td>
</tr>
</tbody>
</table>

**Figure 129: Use of Other Payment Methods (Percentage of all respondents)**
Below Figures show users (income-wise) who use online and other payment methods respectively.

**Figure 130:** Use of Online Payment Methods: Monthly Income-wise (Percentage of all respondents)

<table>
<thead>
<tr>
<th>e-Banking/SADAD</th>
<th>e-Payment (e.g. Paypal)</th>
<th>Credit/Debit Card online</th>
<th>e-Vouchers (e.g. Qitaf, One-Card)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00%</td>
<td>20.00%</td>
<td>40.00%</td>
<td>60.00%</td>
</tr>
<tr>
<td>8.70%</td>
<td>36.35%</td>
<td>20.28%</td>
<td>0.00%</td>
</tr>
<tr>
<td>43.1%</td>
<td>48.48%</td>
<td>34.27%</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

**Figure 131:** Use of Other Payment Methods: Monthly Income-wise (Percentage of all respondents)

<table>
<thead>
<tr>
<th>Credit/Debit Card on Point of Sale (PoS)</th>
<th>Cash on Delivery (CoD)</th>
<th>Phone/SMS Banking</th>
</tr>
</thead>
<tbody>
<tr>
<td>30.001-50.000 (5)</td>
<td>60.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>20.001-30.000 (23)</td>
<td>39.13%</td>
<td>34.78%</td>
</tr>
<tr>
<td>15.001-20.000 (66)</td>
<td>31.82%</td>
<td>56.06%</td>
</tr>
<tr>
<td>11.001-15.000 (143)</td>
<td>15.38%</td>
<td>44.06%</td>
</tr>
<tr>
<td>7.001-11.000 (326)</td>
<td>13.19%</td>
<td>46.32%</td>
</tr>
<tr>
<td>3.001-7.000 (753)</td>
<td>4.25%</td>
<td>22.44%</td>
</tr>
<tr>
<td>Less than SAR 3.000 (779)</td>
<td>3.21%</td>
<td>23.23%</td>
</tr>
</tbody>
</table>
Please rate your satisfaction with e-banking, for the following?

It is found that 33% of the respondents use e-Banking services. Below figure summarizes the level of satisfaction of e-Banking users. The other figure shows the overall satisfaction of e-banking users.

**Figure 132: e-Banking Satisfaction.**

**Figure 133: Overall Satisfaction for e-Banking services**
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)

Below figure indicates that 30% of all respondents faced some problem(s) with their service provider(s) for ICT services.

![Bar Chart: Respondents who Faced Problems with Service Provider](image)

**Figure 134: Respondents who Faced Problems with Service Provider (Percentage of all respondents)**

- No: 69.96%
- Yes: 30.04%

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

Following figure indicates that 71% of those respondents who faced issues have also complained to their service providers.

![Bar Chart: Fraction of Users who complained to Service Provider](image)

**Figure 135: Fraction of Users who complained to Service Provider (Percentage of respondents who faced problem with Service Provider)**

- No: 29.00%
- Yes: 71.00%
14.1.2 Reasons for not complaining to Service Provider

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

Below figure shows the reasons due to which users are not complaining to the service provider.

![Figure 136: Reasons for not complaining to Service Provider (Percentage of non-complainants)]

- No need to complain as the problem is small: 35.04%
- Not sure that the complaint will be addressed: 29.06%
- Don’t know how to complain: 27.35%
- Unsatisfied with previous complaints: 21.3%

14.1.3 Means of Registering Complaints

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

Following figure shows the information about the customer care channels through which the users complained to the service provider.

![Figure 137: Means of Registering Complaints to Service Provider (Percentage of complainants)]

- Calling its customer care center: 86.68%
- Visiting customer care center: 21.96%
- Visiting service provider’s website: 3.37%
- Visiting CITC website: 1.02%
When you registered your complaint(s) to the service provider, did they provide you with a reference number? (Single Choice)

Below figure depicts that 65% of users, who complained to the service provider, have received the complaint reference number.

Figure 138: Complainants who received Complaint Reference Number from Service Provider (Percentage of complainants)

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

Following figure depicts that 45% of respondents who faced issues with their service provider got their problem resolved within 15 days after registering their complaints with their service provider.

Figure 139: Complaints addressed by Service Provider (Percentage of complainants)
Below figure shows how the complaints are addressed by service providers for complainants who submitted their complaints through various channels. It is found that around 44% of the users, who complained to the service providers by calling to the customer care center and 45% of those who visited the customer care center for registering the complaint, got their complaint fully addressed within 15 days.

**Figure 140: 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 acceptable (3.2 out of 5).

*where 5 being ‘Very Satisfied’ and 1 being ‘Very Unsatisfied’*
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 4% of all respondents have complained to CITC irrespective of the fact that whether they have complained to the service provider or not.

![Figure 142: Respondents who complained to CITC (Percentage of all respondents)](96.00%)

Yes 4.00%

No 96.00%

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 19% 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 143: Users’ Awareness regarding Complain of Service Provider to CITC (Percentage of all respondents)](81.00%)

No 81.00%

Yes 19.00%
Figures below show nationality-wise and gender-wise percentage of the complainants.

**Figure 144: Respondents who registered complaints to CITC and Service Provider: Nationality-wise**

<table>
<thead>
<tr>
<th>Nationality</th>
<th>Complained to CITC</th>
<th>Complained to SP</th>
<th>Faced any problem with SP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saudi (1910)</td>
<td>6%</td>
<td>21%</td>
<td>29%</td>
</tr>
<tr>
<td>Expat (1141)</td>
<td>3%</td>
<td>28%</td>
<td>39%</td>
</tr>
</tbody>
</table>

**Figure 145: Respondents who registered complaints to CITC and Service Provider: Gender-wise**

<table>
<thead>
<tr>
<th>Gender</th>
<th>Complained to CITC</th>
<th>Complained to SP</th>
<th>Faced any problem with SP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male (1902)</td>
<td>5%</td>
<td>24%</td>
<td>36%</td>
</tr>
<tr>
<td>Female (1149)</td>
<td>5%</td>
<td>32%</td>
<td>35%</td>
</tr>
</tbody>
</table>

**14.2.2 Reasons for not complaining to CITC**

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

As indicated earlier, only 4% of all respondents have complaint to CITC. Out of the 96% of respondents who did not complain to CITC, 58% had never faced any problem. A considerable number of respondents (26%) did not know how to complain to CITC.

**Figure 146: Reasons for not complaining to CITC (Percentage of non-complainants)**

- Never Faced a problem: 58.10%
- Don’t know how to complain to CITC: 25.57%
- No need to complain to CITC as the problem was resolved by the service provider: 8.40%
- No need to complain as the problem is small: 8.20%
- Not sure that the complaint will be addressed by CITC: 5.95%
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 above acceptable (3.31 out of 5). Following figure shows the satisfaction of users, who registered complaints to CITC, with CITC in handling the complaints.

**Figure 147: Overall Satisfaction in handling the complaint by CITC (Percentage of complainants)**

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.

**Figure 148: Satisfaction rating with respect to various aspects of complaining to CITC**

*where 5 being ‘Very Satisfied’ and 1 being ‘Very Unsatisfied’*
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"? (Single Choice)

It is found that only 27% of all respondents are aware of the fact that they can register an Arabic domain name for website ending with "السعودية".

![Figure 149: Awareness of users for registering "السعودية" domain name for website (Percentage of all respondents)](chart)

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 52% 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.

![Figure 150: Awareness of users for Mobile Number Portability Service (Percentage of all respondents)](chart)
15.3 Perception about CITC involvement in Reducing International Roaming Rates

Are you aware that CITC is playing a major role in reducing International Roaming Rates?

Below figure depicts the awareness of respondents about CITC involvement in reducing international roaming rates.

![Figure 151: Perception about CITC involvement in Reducing International Roaming Rates (Percentage of all respondents)](image)

15.4 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, while the other figure shows the users’ opinions from different regions for the same.

![Figure 152: Users’ opinion regarding Internet Content Filtering (Percentage of all respondents)](image)
Figure 153: Users’ opinion regarding Internet Content Filtering: Region-wise

Below figures show the users’ opinion about Internet Content Filtering from the viewpoint of nationalities and gender respectively.

**Expatriates and Saudis**

I don’t Know

- Expatriates: 36.20%
- Saudis: 18.74%

It is fairly satisfactory

- Expatriates: 49.74%
- Saudis: 81.07%

Extent of filtering is more than required

- Expatriates: 12.01%
- Saudis: 20.16%

Extent of filtering is less than required

- Expatriates: 6.92%
- Saudis: 11.36%

Figure 154: Users’ opinion regarding Internet Content Filtering: Nationality-wise
Figure 155: Users’ opinion regarding Internet Content: Gender-wise
APPENDIX A

DEFINITIONS OF IMPORTANT TERMS
A.1 Household
For the purpose of this ICT Market study, the following definition for Household is used:

- A chief wage earner who is a resident person or living with a group of resident persons who co-reside in, or occupy, a dwelling,
- Responsible to take care of expenses of ICT goods and services related to the household
- This may include e.g. goods and services related to any voice and/or data services (including Internet), TV and radio

A.2 (ICT) User
For the purpose of this ICT Market study, the following definition is used:

- A natural or juridical person who uses the telecommunications services

A.3 (ICT) Non-User
For the purpose of this study, the following definition is used:

- A natural or juridical person who does not use the telecommunications services

A.4 Internet User
Based on analysis and recommendation from benchmarked study, following definition is used:

- A natural or juridical person who has used the Internet at-least once within the last 6 months

A.5 Internet Non-User
Based on analysis and recommendation from benchmarked study, following definition is used:

- A natural or juridical person who has not used the Internet in the last 6 months
A.6 Smart Phones

Based on analysis and recommendation from benchmarked study, following definition is used:

- A smartphone is a mobile phone that has the following features in excess of a basic mobile phone capability (voice and SMS):
  - Advanced Operating System (iOS, Android, Symbian, BlackBerry OS, and Windows OS etc.)
  - QWERTY keyboard (hard keys or software based)
  - Web Access using high Internet speed (3G/4G) and Wi-Fi
  - Email messaging using app
  - Mobile Apps
  - GPS navigation
  - Camera

A.7 Mobile Internet

Mobile Internet which refers to Internet, using ANY mobile SIM (either dedicated data SIMs or add-on data package to voice SIMs) through 3G/4G mobile telecom operators (STC, Mobily or Zain), using ANY Mobile Device (mobile/smartphone, tablet, dongle, 3G/4G router, etc.) and from ANY location. Mobile Internet within the project scope refers to only 3G/4G Internet. It does not include WiMAX Internet services provided by Mobily, ITC and Atheeb (GO).
List of Tables

Table 1: Sample Composition by Region (Percentage of all respondents) .......................................11
Table 2: Sample Composition by Nationality and Gender (Percentage of all respondents) 11
Table 3: Sample Composition by Age-Group (Percentage of all respondents) ..........................12
Table 4: Satisfaction Rating Score Point. ............................................................................................12
Table 5: Price Rating Score Point ..........................................................................................................12
Table 6: ICT Services Usage: Nationality/Gender-wise (Percentage of all respondents) 15
Table 7: When did the user last use the Internet? .............................................................................28
Table 8: Last Use of Mobile Internet (excluding 3G/4G Router) ...............................................................46
List of Figures

Figure 1: Individuals and Households Ratio (Percentage of all respondents) 10
Figure 2: Sample Composition by Nationality and Gender (Percentage of all respondents) 11
Figure 3: Users of ICT (Percentage of all respondents) 13
Figure 4: Users of ICT Services: Region-wise (Percentage of all respondents) 13
Figure 5: Comparison of ICT Usage between Households and Individuals 14
Figure 6: ICT Usage: Nationality-wise 15
Figure 7: ICT Usage: Gender-wise 16
Figure 8: Trend of ICT Usage: Age-Groups 16
Figure 9: Users of Fixed Telephony (Percentage of all respondents) 17
Figure 10: Users of Fixed Telephony (Percentage of Households) 17
Figure 11: Reasons for not using Fixed Telephony Services (Percentage of non-users of Fixed Telephony) 18
Figure 12: Average Monthly Spending on Fixed Telephony Users (Percentage of Households) 18
Figure 13: Overall Satisfaction for Fixed Telephony Services (Percentage of Fixed Telephony Users) 19
Figure 14: Users of Mobile Voice (Percentage of all respondents) 20
Figure 15: Mobile (Voice) Subscribers: Package-wise 20
Figure 16: Percentage of Mobile (Voice) Subscribers: Nationality-wise 21
Figure 17: Mobile (Voice) Subscription: Package-wise 21
Figure 18: Reasons for subscribing more than one Mobile Line (Voice) (Percentage of total subscribers of multiple lines) 22
Figure 19: Mobile (Voice) Usage: Package-wise 22
Figure 20: Mobile (Voice) Usage: Nationality-wise Distribution of No. of SIMs in Use 23
Figure 21: Reasons for using more than one Mobile Line (Voice) (Percentage of users of multiple lines) 23
Figure 22: Average Monthly Spending on Mobile Voice Services for Primary Line 24
Figure 23: Price Rating for Mobile (Voice) Services for Primary Line 25
Figure 24: Satisfaction Rating for Mobile (Voice) Services for Primary Line 26
Figure 25: Users Considering Changing Mobile Service Provider (Voice) (Percentage of mobile voice users) 26
Figure 26: Reasons for Changing Mobile (Voice) Service Provider (Percentage of Users considering changing Service Provider) 27
Figure 27: Internet Users (Percentage of all respondents) 28
Figure 28: Internet Users: Employment-wise 29
Figure 29: Internet Users: Education-wise 29
Figure 30: Reasons for not using Internet in the last six (6) months (Percentage of non-users of Internet) 30
Figure 31: Planning to use Internet in the next six (6) months (Percentage of non-users of Internet) 30
Figure 32: Non-Users Planning to use Internet in the next six (6) months: Nationality/Gender wise 31
Figure 33: Non-Users Planning to use Internet in the next six (6) months: Age-wise 31
Figure 34: Unaware Use of Internet (Percentage of non-users of Internet) 32
Figure 35: Place of using Internet (Percentage of Internet Users) 32
Figure 36: Place of using Internet: Gender-wise 33
Figure 37: Place of using Internet: Age-Group 33
Figure 38: Time Spent on Internet – Active Usage (Percentage of Internet Users) 34
Figure 39: Time Spent on Internet – Active Usage: Nationality-wise 34
Figure 40: Time Spent on Internet – Active Usage: Gender-wise 35
Figure 41: Time Spent on Internet – Active Usage: Age-wise 35
Figure 42: Time Spent on Internet – Active Usage: Employment-wise 36
Figure 43: Users of Internet at Home (Percentage of all respondents) 37
Figure 44: Users of Internet at Home (Percentage of Internet Users) 37
Figure 45: Type of Internet Access Method at Home (Percentage of Internet Users at Home) 37
Figure 46: Users of Internet at Home: Region-wise 38
Figure 47: Users of Internet at Home: Nationality-wise 38
Figure 48: Users of Internet at Home: Gender-wise 38
Figure 49: Users of Internet at Home: Age-Group 39
Figure 50: Reasons for not using Internet at Home (Percentage of non-users of Internet at home) 39
Figure 51: Internet Activities done at Home (Percentage of Internet users at Home) 40
Figure 52: Average Monthly Spending on Internet at Home using 3G/4G Router (Percentage of Households using the service) 41
Figure 53: Price Rating for Internet at Home (for 3G/4G service) 41
Figure 54: Satisfaction Rating for Internet Users at Home (for 3G/4G service) 42
Figure 55: Distribution of Internet Users at Home using DSL/FTTH/WiMAX (Percentage of Internet users at Home using DSL/FTTH/WiMAX as Primary ISP) 42
Figure 56: Subscribed Bandwidth for DSL. (Percentage of DSL Users) 43
Figure 57: Subscribed Bandwidth for FTTH (Percentage of FTTH Users) 43
Figure 58: Average Monthly Spending on Internet at Home using DSL/FTTH/WiMAX (Percentage of Households using the service) 44
Figure 59: Price Rating for Internet at Home (for DSL/FTTH/WiMAX) 44
Figure 60: Satisfaction Rating for Internet Users at Home (for DSL/FTTH/WiMAX) 45
Figure 61: Planning to increase Internet Speed in the next 12 months (Percentage of Internet users at Home) 45
Figure 121: Reasons for not Purchasing Products/Services over the Internet (Percentage of non-users of online-shopping) 79

Figure 122: Tangible Items purchased over the Internet (Percentage of online purchasers) 80

Figure 123: Non-tangible Items purchased over the Internet (Percentage of online purchasers) 80

Figure 124: Tangible Items purchased over the Internet: Nationality-wise 81

Figure 125: Non-tangible Items purchased over the Internet: Nationality-wise 81

Figure 126: Tangible Items purchased over the Internet: Gender-wise 82

Figure 127: Non-tangible Items purchased over the Internet: Gender-wise 82

Figure 128: Use of Online Payment Methods (Percentage of all respondents) 83

Figure 129: Use of Other Payment Methods (Percentage of all respondents) 83

Figure 130: Use of Online Payment Methods: Income-wise (Percentage of all respondents) 84

Figure 131: Use of Other Payment Methods: Income-wise (Percentage of all respondents) 84

Figure 132: e-Banking Satisfaction. 85

Figure 133: Overall Satisfaction for e-Banking services 85

Figure 134: Respondents who Faced Problems with Service Provider (Percentage of all respondents) 86

Figure 135: Fraction of Users who complained to Service Provider (Percentage of respondents who faced problem with Service Provider) 86

Figure 136: Reasons for not complaining to Service Provider (Percentage of non-complainants) 87

Figure 137: Means of Registering Complaints to Service Provider (Percentage of complainants) 87

Figure 138: Complainants who received Complaint Reference Number from Service Provider (Percentage of complainants) 88

Figure 139: Complaints addressed by Service Provider (Percentage of complainants) 88

Figure 140: Complaints Registered through various channels addressed by Service Providers 89

Figure 141: Satisfaction rating in handling the complaint by Service Provider 89

Figure 142: Respondents who complained to CITC (Percentage of all respondents) 90

Figure 143: Users’ Awareness regarding Complain of Service Provider to CITC (Percentage of all respondents) 90

Figure 144: Respondents who registered complaints to CITC and Service Provider: Nationality-wise 91

Figure 145: Respondents who registered complaints to CITC and Service Provider: Gender-wise 91

Figure 146: Reasons for not complaining to CITC (Percentage of non-complainants) 91

Figure 147: Overall Satisfaction in handling the complaint by CITC (Percentage of complainants) 92

Figure 148: Satisfaction rating with respect to various aspects of complaining to CITC 92

Figure 149: Awareness of users for registering “السعودية” domain name for website (Percentage of all respondents) 93
Figure 150: Awareness of users for Mobile Number Portability Service (Percentage of all respondents) 93
Figure 151: Perception about CITC involvement in Reducing International Roaming Rates (Percentage of all respondents) 94
Figure 152: Users’ opinion regarding Internet Content Filtering (Percentage of all respondents) 94
Figure 153: Users’ opinion regarding Internet Content Filtering: Region-wise 95
Figure 154: Users’ opinion regarding Internet Content Filtering: Nationality-wise 95
Figure 155: Users’ opinion regarding Internet Content: Gender-wise 96

(Footnotes)

1. 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.