



**Research methodology**

Our research represents more than 10 million consumers in urban Morocco, across all socioeconomic clusters, with an age range of 15–59. Fieldwork was

carried out between July and August 2014, using face-to-face interviews. The cities covered include: Agadir, Casablanca, Fez, Marrakech, Oujda and Tangier.

## KEY FINDINGS



**Smartphone penetration has reached a critical mass, driving new behavior**

- > Overall penetration in urban Morocco exceeds 50 percent – 40 percent of new phone purchases in the next 12 months are expected to be smartphones

**Anywhere internet is widely expected**

- > 54 percent of Moroccan users consider it important to be able to access the internet from wherever they are

**The experience should be seamless**

- > Moroccan consumers seek a connection that is secure and dependable, allowing them to enjoy an uninterrupted experience

**Mobile apps are used frequently**

- > 97 percent of Moroccan smartphone owners use mobile apps, with social networking, peer-to-peer communication and YouTube being the most popular

**Network performance is a key driver of satisfaction with mobile services**

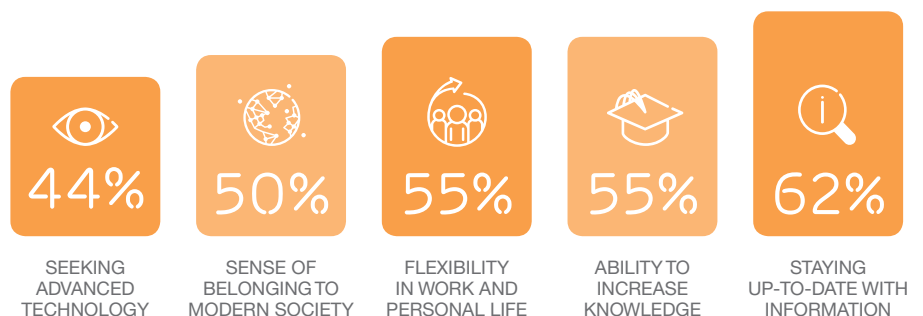
- > 58 percent of smartphone users say they would use more apps and internet services if their mobile data connection was faster and more reliable

**Transformation is expected across other sectors**

- > Consumers look forward to the digitalization of services across television, government and commerce

Figure 1: Drivers of technology uptake

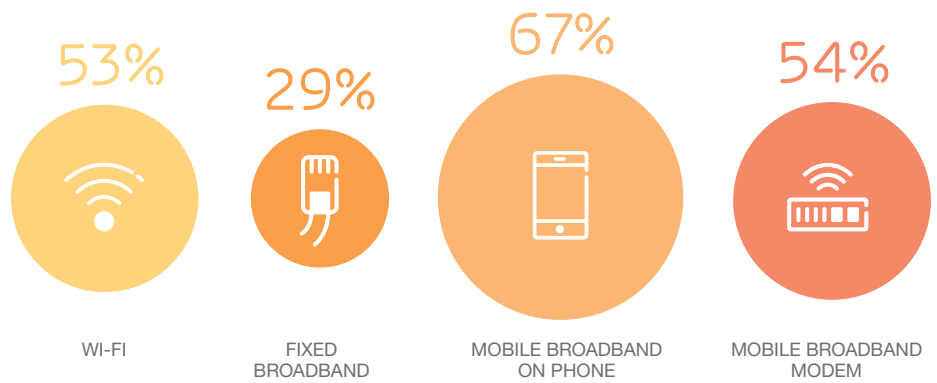
Consumers in urban Morocco aspire to leverage technology for education and knowledge, as it enables them to stay up-to-date with information. Many also feel that being connected brings them a sense of belonging in modern society. Enhanced flexibility in their personal and professional lives are also considered key aspects.



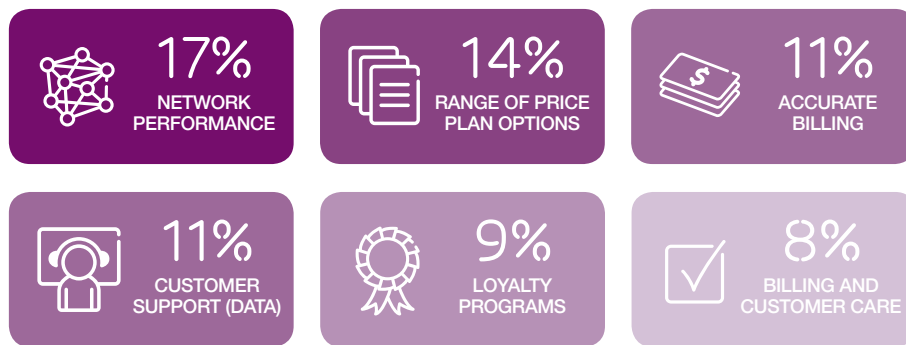
Source: Ericsson ConsumerLab Analytical Platform 2015, Internet goes mobile, Maghreb  
Base: All users, Morocco

Figure 2: Internet usage and access

Internet usage in urban areas is common, with 75 percent overall and 90 percent of the younger population accessing it regularly. Moroccan consumers are set to take full advantage of everywhere connectivity, with two out of three internet users already accessing the web on their phone, and half through a mobile broadband modem. Mobile access is the primary connectivity choice for urban Moroccan consumers.



Source: Ericsson ConsumerLab Analytical Platform 2015, Internet goes mobile, Maghreb  
Base: Internet users, Morocco



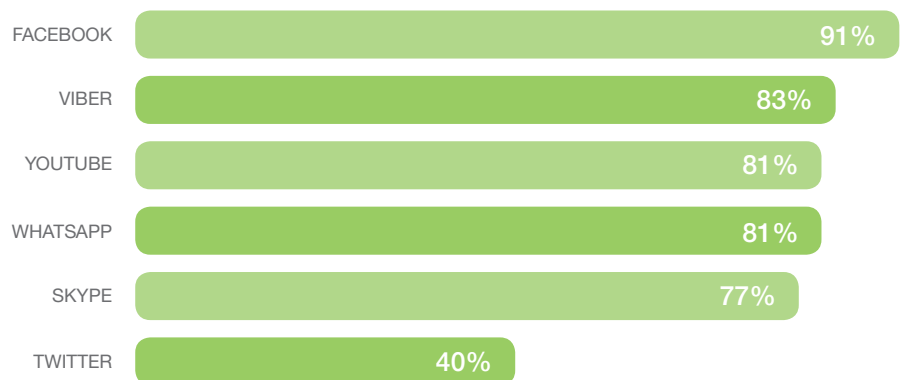
Source: Ericsson ConsumerLab Analytical Platform 2015, Internet goes mobile, Maghreb  
Base: Mobile phone users, Morocco

Figure 3: Drivers of satisfaction with mobile operators

Network performance is the primary driver of satisfaction with mobile operators, and enhanced network speed and quality are considered critical factors in the further usage of advanced mobile services and applications. An adequate range of price plan options, accurate billing and customer support for data services are further important factors in keeping users happy with their mobile operator.

Figure 4: App usage in Morocco

Smartphones encourage widespread adoption of mobile apps. The top applications used are those related to social networking, peer-to-peer communication and video streaming.



Source: Ericsson ConsumerLab Analytical Platform 2015, Internet goes mobile, Maghreb  
Base: Smartphone users, Morocco

