



Research methodology

Our research represents more than 4 million consumers in urban Tunisia, 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: Grand Tunis, Jendouba, Nabeul, Sfax and Sousse.

KEY FINDINGS



Technology is viewed as a key enabler of societal modernization

> Tunisian consumers look to technology as a means of obtaining information, facilitating a more flexible work/life balance and creating a sense of belonging within modern society

Electronic public services are expected to have tangible benefits

> The greatest amount of interest is shown for services such as e-health, e-learning, electronic identification and filing certificate requests. Tunisian consumers believe they will offer more convenience and better accuracy and customer service

Secure, reliable, anywhere internet is widely expected

> 72 percent of Tunisian users consider it important to be able to access the internet from wherever they are

Network performance is a key driver of satisfaction with mobile services and app usage

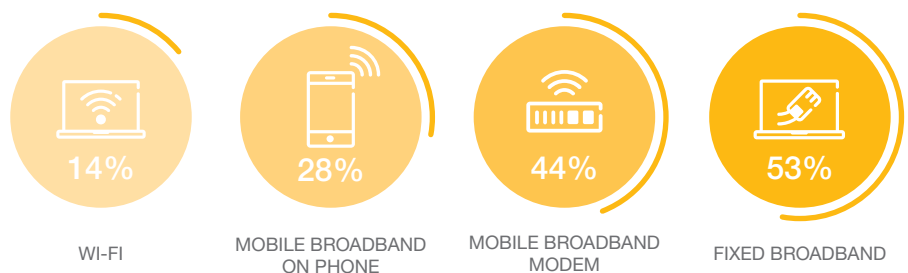
> More than half of smartphone users say they would use more apps and internet services if their mobile data connection was faster and more reliable

Strong potential for mobile commerce uptake

> Consumers look forward to the wide availability of mobile money transfer and payment services, with enhanced security expected to boost adoption

Figure 1: Internet usage and access

Mobile networks are increasingly used in the country to access the internet, nearing levels of fixed broadband. 44 percent of Tunisian internet users now access the web through a mobile modem, with penetration of mobile data services on phones set to double within the next year.



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

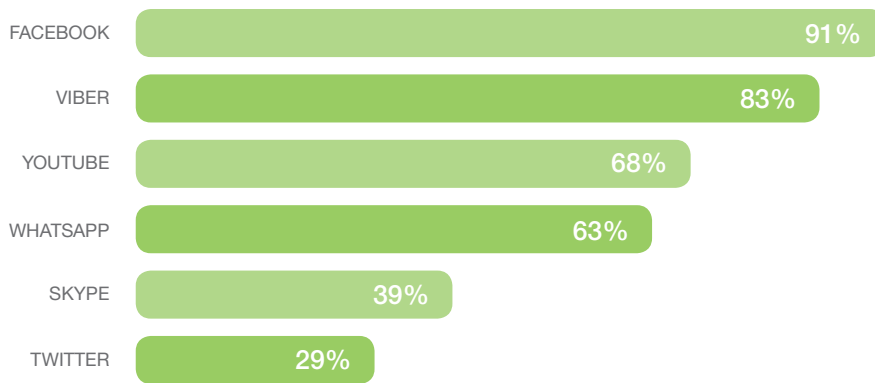


Figure 2: App usage in Tunisia

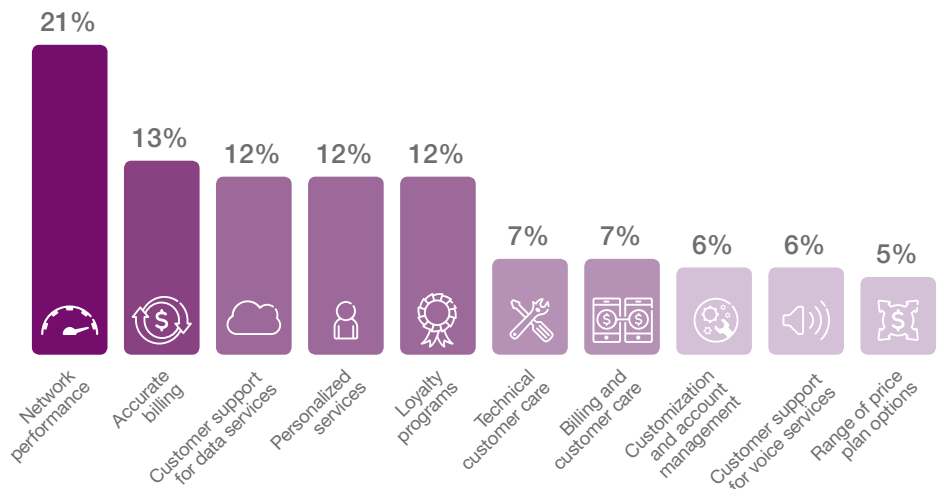
4 out of 5 Tunisian smartphone owners use apps, with Facebook, Viber and YouTube being the most popular. More than half said they would be likely to increase their app and service usage as mobile networks get faster.

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

Figure 3: Drivers of satisfaction with mobile operators

Network performance is the primary driver of satisfaction with mobile networks, followed by accurate billing and customer support for data services.

Users also show an interest in personalization and loyalty programs.



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

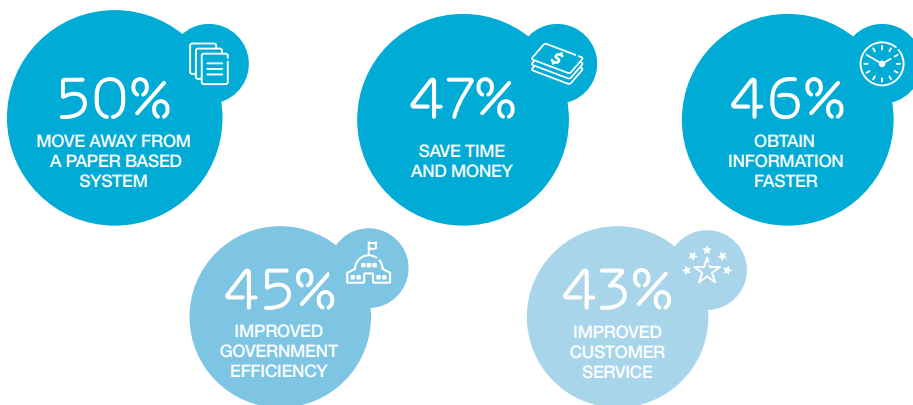


Figure 4: Expected benefits of electronic public services

As well as adopting mobile services for personal use, Tunisian consumers are interested in the future potential of electronic public services. Their effective implementation will allow them to access information faster, and receive a higher level of customer service. Consumers show a particular interest in e-health and e-learning services, allowing them to move away from a paper-based system and save both time and money.

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

