



# **Tunisia Internet users and e-commerce survey 2008**

**A Multi Client Project of  
Arab Advisors Group**

**August 2008**

**Analyst:  
Hussam Barhoush**

**Arab Advisors Group  
A member of the Arab Jordan Investment Bank Group**

PO Box 2374  
Amman 11821 - Jordan  
Tel. 962.6.5828849  
Fax. 962.6.5828809  
arabadvisors@arabadvisors.com  
www.arabadvisors.com

This report has been delivered to **Client** to be used exclusively by its employees.

**Copyright notice:** Copyright 2008 by Arab Advisors Group. All rights reserved. No material contained in this report may be reproduced in whole or in part without the prior written permission of the publisher. Any unauthorized use, disclosure, copying, selling, distribution or in any way transfer of any direct or indirect information from this report which is the property of Arab Advisors Group, removing, erasing or hiding from view any copyright, trademark, confidentiality notice, mark or legend appearing on Arab Advisors Group products or any form of output is strictly prohibited, and will be under legal responsibility. The information contained in this report has been obtained from sources we believe to be reliable, but neither its completeness nor accuracy can be guaranteed. Opinions expressed are based on our interpretation of the available information, and are subject to change.

**Feedback:** Our clients' satisfaction is of our utmost concern. We welcome all feedback regarding our research and products. Please send us your notes on this report, what you found useful in it and future research directions that would help you in your business. Send feedback emails to: [arabadvisors@arabadvisors.com](mailto:arabadvisors@arabadvisors.com)

## Table of Contents

<b>Section I: Introduction and survey background</b> .....	
<b>Section II: Survey Results and Analysis</b> .....	
<b>General information on respondents and their households</b> .....	
<b>Telecommunications</b> .....	
<b>Cellular subscription</b> .....	
<b>Internet</b> .....	
<b>Internet subscription</b> .....	
<b>Internet usage</b> .....	
<b>Internet access methods and costs</b> .....	
Internet monthly expenditure.....	
Internet access methods outside home.....	
Internet usage through cellular handsets .....	
Average Internet duration per day .....	
e-mail service .....	
Voice over IP (VoIP) .....	
<b>Internet users interaction on the Internet</b> .....	
<b>e-commerce</b> .....	
e-commerce trends.....	
Local and International e-commerce portals .....	
<b>e-Banking and e-Government services</b> .....	
Online banking .....	
Mobile banking .....	
e-government services.....	

## List of Exhibits

<b>Exhibit 1: Nationality of survey respondents.....</b>	.....
<b>Exhibit 2: Location of Internet users .....</b>	.....
<b>Exhibit 3: Gender of Internet users .....</b>	.....
<b>Exhibit 4: Internet users age groups .....</b>	.....
<b>Exhibit 5: Age Group by gender .....</b>	.....
<b>Exhibit 6: Household size .....</b>	.....
<b>Exhibit 7: Location by household size.....</b>	.....
<b>Exhibit 8: Internet users subscribed to the cellular service .....</b>	.....
<b>Exhibit 9: Number of cellular lines used by respondents.....</b>	.....
<b>Exhibit 10: Number of cellular lines by age group.....</b>	.....
<b>Exhibit 11: Cellular subscription plans.....</b>	.....
<b>Exhibit 12: Whether respondents are aware of 3G services .....</b>	.....
<b>Exhibit 13: Awareness of 3G services by age group .....</b>	.....
<b>Exhibit 14: 3G services respondents will use if available in the market.....</b>	.....
<b>Exhibit 15: 3G services respondents will use if available in the market by age group .....</b>	.....
<b>Exhibit 16: Whether respondents have Internet access at home.....</b>	.....
<b>Exhibit 17: Whether respondents have Internet access at home by age group.....</b>	.....
<b>Exhibit 18: Whether respondents have Internet access at home by location.....</b>	.....
<b>Exhibit 19: Type of Internet connections at home .....</b>	.....
<b>Exhibit 20: Type of Internet connection at home by age group .....</b>	.....
<b>Exhibit 21: ISPs market shares .....</b>	.....
<b>Exhibit 22: Internet uses.....</b>	.....
<b>Exhibit 23: Internet uses by age group.....</b>	.....
<b>Exhibit 24: Whether all family members use the Internet.....</b>	.....
<b>Exhibit 25: Reasons for some family members not using the Internet .....</b>	.....
<b>Exhibit 26: Monthly spending on Internet access (TND) .....</b>	.....
<b>Exhibit 27: Monthly spending on Internet access (TND) by location.....</b>	.....
<b>Exhibit 28: Monthly spending on Internet access (TND) by age group .....</b>	.....
<b>Exhibit 29: Internet access outside home.....</b>	.....
<b>Exhibit 30: Internet access and usage in home and work .....</b>	.....
<b>Exhibit 31: Devices used to access the Internet.....</b>	.....
<b>Exhibit 32: Devices used to access the Internet by age group.....</b>	.....
<b>Exhibit 33: Whether respondents access the Internet through their cellular handset.....</b>	.....
<b>Exhibit 34: Whether respondents access the Internet through their cellular handset by age group.....</b>	.....
<b>Exhibit 35: Whether respondents access the Internet through their cellular handset by gender .....</b>	.....
<b>Exhibit 36: Monthly spending on Internet access through cellular handsets (TND) ..</b>	.....
<b>Exhibit 37: Monthly spending on Internet through cellular handsets (TND) by age group .....</b>	.....
<b>Exhibit 38: Whether respondents download content from the Internet to their cellular handset .....</b>	.....
<b>Exhibit 39: Source of downloaded content from the Internet to cellular handsets.</b>	.....
<b>Exhibit 40: Average duration of daily Internet usage.....</b>	.....

<b>Exhibit 41: Average duration of daily Internet usage by age Group .....</b>	
<b>Exhibit 42: E-mail service provider .....</b>	
<b>Exhibit 43: whether respondents make phone calls through the Internet (VoIP) .....</b>	
<b>Exhibit 44: whether respondents make phone calls through the Internet (VoIP) by age group .....</b>	
<b>Exhibit 45: Means by which respondents make calls through the Internet .....</b>	
<b>Exhibit 46: Whether respondents socialize through the Internet .....</b>	
<b>Exhibit 47: Whether respondents socialize through the Internet by age group....</b>	
<b>Exhibit 48: Whether respondents own or manage a website.....</b>	
<b>Exhibit 49: Content of owned/managed websites.....</b>	
<b>Exhibit 50: Whether respondents shop online or through their cellular line .....</b>	
<b>Exhibit 51: Whether respondents shop online or through their cellular line by age group.....</b>	
<b>Exhibit 52: Whether respondents shop online or through their cellular line by gender. ....</b>	
<b>Exhibit 53: Internet and e-commerce users in the Tunisia .....</b>	
<b>Exhibit 54: e-commerce methods of payment.....</b>	
<b>Exhibit 55: Reported hurdles facing more use of e-commerce.....</b>	
<b>Exhibit 56: e-commerce products and services .....</b>	
<b>Exhibit 57: Frequency of e-commerce use .....</b>	
<b>Exhibit 58: e-commerce expenditure during the past 12 months (TND).....</b>	
<b>Exhibit 59: e-commerce total expenditure calculations for the past 12 months.....</b>	
<b>Exhibit 60: e-commerce expenditure during the past year (TND) during by age group .....</b>	
<b>Exhibit 61: e-commerce expenditure during the past year by location .....</b>	
<b>Exhibit 62: Whether e-commerce users shop from local websites.....</b>	
<b>Exhibit 63: Perception of local e-commerce websites .....</b>	
<b>Exhibit 64: Comparison of local and international e-commerce companies .....</b>	
<b>Exhibit 65: Whether it is important to have local e-commerce companies.....</b>	
<b>Exhibit 66: Products and services respondents believe local e-commerce companies should provide.....</b>	
<b>Exhibit 67: Perception of e-commerce in terms of security .....</b>	
<b>Exhibit 68: Whether respondents have bank accounts.....</b>	
<b>Exhibit 69: bank accounts availability by Age group .....</b>	
<b>Exhibit 70: Whether respondents' banks provides online banking services .....</b>	
<b>Exhibit 71: Whether respondents use online banking services.....</b>	
<b>Exhibit 72: Online banking uses .....</b>	
<b>Exhibit 73: Online banking perception .....</b>	
<b>Exhibit 74: Whether respondents' banks provides mobile banking services .....</b>	
<b>Exhibit 75: Whether respondents use mobile banking services .....</b>	
<b>Exhibit 76: Mobile banking uses .....</b>	
<b>Exhibit 77: Mobile banking perception.....</b>	
<b>Exhibit 78: Whether respondents use e-government services.....</b>	
<b>Exhibit 79: e-government uses.....</b>	
<b>Exhibit 80: e-government perception .....</b>	

