



Egypt Households Telecoms and Media Survey Report 2008

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

April 2008

Analysts:

Issa Goussous
Samer Abbas

**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** as part of the subscription to the **Arab Advisors Group Strategic Research Service** 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

Table of Contents

Section I: Introduction and Survey Background	1
Section II: Survey Results and Analysis	3
General Information on Demographics and Households.....	3
Telecommunications	10
Fixed Line Use	10
Telecommunications Services Usage	15
Fax Usage	15
VoIP Usage.....	16
Prepaid Calling Cards Usage.....	19
Public Payphones Service Usage	21
Cellular Service Use.....	25
Mobile Operators and Plans	25
Usage of respondents' cellular lines by other household members	40
An analysis of Egypt's Mobile Penetration and Effective Mobile Penetration rates	44
Prepaid and Postpaid Plans	46
Cellular Handsets	49
Cellular Data Services.....	57
Bluetooth Usage	57
SMS Usage	60
MMS Usage.....	63
3G services.....	67
Roaming services	73
International Calls.....	74
Perception of Operators	81
Perception of fixed operators	81
Telecom Egypt	81
Subscribing to a new fixed line operator	82
Perception of cellular operators	85
Mobinil.....	85
Vodafone Egypt.....	86
Etisalat Misr.....	87
Changing mobile line	88
Most Important Aspects for Preferred Mobile Operator.....	90
Computer and Internet Usage Patterns in Egypt	92
PC and laptop availability in Urban Egyptian households.....	92
Internet Usage in Egypt.....	93
Internet connections in Urban Egyptian households	103
An analysis of Egypt's ADSL Penetration and Effective ADSL Penetration.....	107
E-commerce adoption in Egypt	109

Media Usage Trends in Egypt.....	110
Satellite TV	119
Pay TV.....	133
Terrestrial TV	136
Radio Listening	139
Radio Listening	139
Movies.....	148

List of Exhibits

Exhibit 1: Nationality of survey respondents	3
Exhibit 2: Gender of survey respondents	4
Exhibit 3: Age groups of survey respondents.....	5
Exhibit 4: Age group by gender	6
Exhibit 5: Education of survey respondents	6
Exhibit 6: Education by gender	7
Exhibit 7: Age group by education	7
Exhibit 8: Governorate of survey respondents	8
Exhibit 9: Household size	9
Exhibit 10: Monthly personal income (EGP) of survey respondents.....	9
Exhibit 11: Fixed line availability at home	10
Exhibit 12: Fixed line availability at home by governorate	11
Exhibit 13: Reasons for not having a fixed line	12
Exhibit 14: Fixed VAS usage	13
Exhibit 15: Fixed VAS usage by gender.....	13
Exhibit 16: Fixed VAS usage by age group	14
Exhibit 17: Fax usage	15
Exhibit 18: VoIP usage	16
Exhibit 19: VoIP usage by gender.....	16
Exhibit 20: VoIP usage by age group.....	16
Exhibit 21: VoIP usage method	17
Exhibit 22: Perception of VoIP.....	18
Exhibit 23: Usage of prepaid calling cards	19
Exhibit 24: Usage of prepaid calling cards by gender	19
Exhibit 25: Usage of prepaid calling cards by age group	20
Exhibit 26: Uses of prepaid calling cards	20
Exhibit 27: Usage of public payphones	21
Exhibit 28: Usage of public payphones by gender	21
Exhibit 29: Usage of public payphones by age group	22
Exhibit 30: Usage of public payphones by governorate	22
Exhibit 31: Uses of public payphones	23
Exhibit 32: Reasons for using public payphones	24
Exhibit 33: Statistics of total mobile lines at household.....	25
Exhibit 34: Mobile lines in household.....	25
Exhibit 35: Statistics of types of mobile subscriptions used in household	26
Exhibit 36: Types of mobile subscriptions used in household.....	26
Exhibit 37: Mobile operators in household.....	27
Exhibit 38: Cellular market shares based on survey findings for operator's presence in households.....	27
Exhibit 39: Mobile line usage by respondents	28
Exhibit 40: Mobile line usage by gender	28
Exhibit 41: Mobile line usage by age group.....	28
Exhibit 42: Reasons for not using a mobile line	29
Exhibit 43: Respondents' mobile operator(s).....	30
Exhibit 44: Cellular market shares based on surveyed respondents' operators	30
Exhibit 45: Respondent's mobile operator by gender	31
Exhibit 46: Respondent's mobile operator by age group	31

Exhibit 47: Respondent's mobile operator by monthly personal income.....	32
Exhibit 48: Types of mobile subscriptions of respondent	33
Exhibit 49: Types of mobile subscription of respondent by age group	33
Exhibit 50: Period of owning the mobile line.....	34
Exhibit 51: Period of owning a mobile line by gender	34
Exhibit 52: Period of owning a mobile line by age group.....	35
Exhibit 53: What affects the respondent's choice of mobile operator and plan	35
Exhibit 54: What affects respondent's choice of operator and plan by gender.....	36
Exhibit 55: What affects respondent's choice of operator and plan by age group	36
Exhibit 56: Statistics of number of mobile lines the respondent has	37
Exhibit 57: Number of mobile lines that the respondent owns	
Exhibit 58: Reasons for using more than one mobile line.....	37
Exhibit 59: Potential reason(s) that may encourage respondents to get an additional mobile line in the future.....	38
Exhibit 60: Whether the respondent's mobile line is used by other household members.....	39
Exhibit 61: Whether the respondent's mobile line is used by other household members by age group.....	40
Exhibit 62: Whether the respondent's mobile line is used by other household members by monthly income	40
Exhibit 63: Whether the respondent's mobile line is used by other household members by type of subscription of respondent	41
Exhibit 64: Whether the respondent's mobile line is used by other household members by operator of respondent	41
Exhibit 65: Reasons for using respondent's mobile line by other household members.....	42
Exhibit 66: Reasons for using respondent's mobile line by other household members by operator of respondent	42
Exhibit 67: Number of household members using respondent's mobile line...43	
Exhibit 68: Egypt mobile market penetration by end of 2007.....	44
Exhibit69: Survey findings for the respondent's number of mobile lines.....	44
Exhibit 70: Actual number of mobile subscribers	44
Exhibit 71: Egypt's effective mobile penetration rate.....	45
Exhibit 72: Postpaid plan(s) used by respondent.....	46
Exhibit 73: Prepaid plan(s) used by respondent	47
Exhibit 74: Location of purchasing prepaid recharge cards	48
Exhibit 75: Cellular handset brand(s) used by respondent.....	49
Exhibit 76: Cellular handset brands by gender.....	50
Exhibit 77: Cellular handset brands by age group	50
Exhibit 78: Cellular handset brand by monthly income	51
Exhibit 79: Source of cellular handset	52
Exhibit 80: Source of cellular handset by handset brand.....	53
Exhibit 81: Cost of cellular handset	54
Exhibit 82: Cost of cellular handset by age group	54
Exhibit 83: Whether respondent buys second-hand cellular handsets	55
Exhibit 84: Frequency of changing cellular handset	55
Exhibit 85: Frequency of changing cellular handset by age group.....	56
Exhibit 86: Cellular handset supported features	56
Exhibit 87: Bluetooth usage	57

Exhibit 88: Bluetooth usage by gender	57
Exhibit 89: Bluetooth usage by age group	58
Exhibit 90: Uses of Bluetooth	58
Exhibit 91: Uses of Bluetooth by gender	58
Exhibit 92: Uses of Bluetooth by age group	58
Exhibit 93: Frequency of Bluetooth usage.....	59
Exhibit 94: Frequency of Bluetooth usage by gender	59
Exhibit 95: Frequency of Bluetooth usage by age group.....	59
Exhibit 96: SMS usage	60
Exhibit 97: SMS usage by gender.....	60
Exhibit 98: SMS usage by age group.....	60
Exhibit 99: SMS usage by respondent's type of subscription.....	61
Exhibit 100: Frequency of SMS usage	61
Exhibit 101: Frequency of SMS usage by gender.....	61
Exhibit 102: Frequency of SMS usage by age group	62
Exhibit 103: SMS destinations	62
Exhibit 104: Whether respondent has MMS service activated.....	63
Exhibit 105: MMS usage	64
Exhibit 106: MMS usage by gender	64
Exhibit 107: MMS usage by age group	65
Exhibit 108: MMS usage by respondent's type of subscription.....	65
Exhibit 109: MMS usage by respondent's operator.....	65
Exhibit 110: Uses of MMS	66
Exhibit 111: Uses of MMS by gender	66
Exhibit 112: Uses of MMS by age group	66
Exhibit 113: Awareness of 3G services	67
Exhibit 114: Awareness of 3G by gender	67
Exhibit 115: Awareness of 3G by age group.....	67
Exhibit 116: Awareness of 3G by education	68
Exhibit 117: Awareness of 3G by respondent's operator	68
Exhibit 118: Mobile handset support 3G	68
Exhibit 119: Mobile handset 3G support by gender	69
Exhibit 120: Mobile handset 3G support by age group	69
Exhibit 121: Mobile handset 3G support by handset brand.....	69
Exhibit 122: 3G services usage.....	70
Exhibit 123: 3G services usage by gender	70
Exhibit 124: 3G services usage by age group.....	70
Exhibit 125: 3G services usage by respondent's type of subscription.....	71
Exhibit 126: 3G services used.....	71
Exhibit 127: 3G services used by gender	71
Exhibit 128: 3G services used by age group.....	72
Exhibit 129: Whether respondent uses cellular service while traveling (roaming)	73
Exhibit 130: Whether respondent makes international calls.....	74
Exhibit 131: Whether respondent makes international calls by gender	74
Exhibit 132: Whether respondent makes international calls by age group.....	74
Exhibit 133: Whether respondent makes international calls by monthly income	75
Exhibit 134: Method of making international calls	76
Exhibit 135: Method of making international calls by gender	77

Exhibit 136: Method of making international calls by age group.....	77
Exhibit 137: Method of making international calls by monthly income.....	78
Exhibit 138: Parties called internationally	79
Exhibit 139: Parties called internationally by gender	79
Exhibit 140: Parties called internationally by age group	79
Exhibit 141: International calls destinations	80
Exhibit 142: Preferred time to make international calls	80
Exhibit 143: Perception of Telecom Egypt’s services.....	81
Exhibit 144: Whether respondent considers subscribing or changing fixed line operator if there is a new operator in the market.....	82
Exhibit 145: Considering changing fixed line operator by age group	82
Exhibit 146: Considering changing fixed line operator by monthly personal income	83
Exhibit 147: Reasons for considering changing fixed line operator	84
Exhibit 148: Mobinil subscribers’ level of satisfaction	85
Exhibit 149: Perception of Mobinil’s services	85
Exhibit 150: Vodafone subscribers’ level of satisfaction	86
Exhibit 151: Perception of Vodafone’s services.....	86
Exhibit 152: Etisalat Misr subscribers’ level of satisfaction.....	87
Exhibit 153: Perception of Etisalat Misr’s services	87
Exhibit 154: Whether respondent ever changed mobile line (number).....	88
Exhibit 155: Whether respondent ever changed mobile line by type of subscription of respondent.....	88
Exhibit 156: Whether respondent ever changed mobile line by the current operator of the respondent	88
Exhibit 157: Reasons for changing mobile line (number).....	89
Exhibit 158: Most important aspect of a mobile operator.....	90
Exhibit 159: Which is more important to respondent: price/cost or network coverage	90
Exhibit 160: Which is more important to respondent: price/cost or network coverage by age group	90
Exhibit 161: Which is more important to respondent: price/cost or network connection quality.....	91
Exhibit 162: Which is more important to respondent: price/cost or network connection quality by age group.....	91
Exhibit 163: Which is more important to respondent: price/cost or customer care	91
Exhibit 164: Which is more important to respondent: price/cost or customer care by age group	91
Exhibit 165: Availability of PC or laptop in household	92
Exhibit 166: Statistics of number of PCs/laptops in household.....	92
Exhibit 167: Internet usage.....	93
Exhibit 168: Internet usage by gender	93
Exhibit 169: Internet usage by age group.....	93
Exhibit 170: Internet usage by education	93
Exhibit 171: Reasons for not using the Internet	94
Exhibit 172: Reasons for not using the Internet by gender	94
Exhibit 173: Reasons for not using the Internet by age group.....	94
Exhibit 174: Reasons for not using the Internet by education.....	95
Exhibit 175: Location of accessing the Internet.....	95
Exhibit 176: Location of accessing the Internet by gender.....	96
Exhibit 177: Location of accessing the Internet by age group.....	96

Exhibit 178: Preferred language for accessing the Internet	97
Exhibit 179: Average time spent accessing the Internet per day.....	97
Exhibit 180: Average time spent accessing the Internet per day by gender.....	98
Exhibit 181: Average time spent accessing the Internet per day by age group	98
Exhibit 182: Reasons for using the Internet	98
Exhibit 183: Reasons for using the Internet by gender	99
Exhibit 184: Reasons for using the Internet by age group	99
Exhibit 185: Uses of the Internet	100
Exhibit 186: Email service provider	101
Exhibit 187: Type of content downloaded from Internet	102
Exhibit 188: Internet connection in the household	103
Exhibit 189: Type of Internet connection in the household.....	104
Exhibit 190: DSL connection speed at household	105
Exhibit 191: Presence of DSL sharing for households with DSL connection.....	106
Exhibit 192: Number of households with which DSL connection is shared.....	106
Exhibit 193: Egypt's residential ADSL lines penetration by end of 2007...107	
Exhibit 194: Survey findings for the number of households sharing one DSL connection with the respondent's household.....	107
Exhibit 195: Estimated number of households with ADSL connections.....	108
Exhibit 196: Egypt's effective ADSL penetration rate	108
Exhibit 197: E-commerce use by respondents who use the Internet.....	109
Exhibit 198: Television viewing	110
Exhibit 199: Types of TV programs watched	110
Exhibit 200: Types of television programs watched by age group.....	112
Exhibit 201: Types of television programs watched by gender.....	113
Exhibit 202: Types of television programs watched by education	114
Exhibit 203: Hours of TV viewing.....	115
Exhibit 204: Hours of TV viewing by age group.....	116
Exhibit 205: Hours of TV viewing by gender	116
Exhibit 206: Time of TV viewing	117
Exhibit 207: Language preference	117
Exhibit 208: Language preference by age group	118
Exhibit 209: Language preference by gender.....	118
Exhibit 210: Satellite dish availability.....	119
Exhibit 211: Satellite system used.....	120
Exhibit 212: Name up to five channels you watch most	121
Exhibit 213: Use of SMS for TV voting.....	123
Exhibit 214: SMS for ordering mobile content from TV.....	124
Exhibit 215: SMS for TV chatting	125
Exhibit 216: Music channels usually watched	126
Exhibit 217: General/Movies and series usually watched	127
Exhibit 218: Sports channels usually watched	129
Exhibit 219: Religious channels usually watched	130
Exhibit 220: News and current affairs channels usually watched	131
Exhibit 221: Trustworthiness of satellite news channels.....	132
Exhibit 222: Pay TV availability	133
Exhibit 223: Pay TV provider	134
Exhibit 224: ART packages	134
Exhibit 225: Orbit packages	134
Exhibit 226: Showtime packages	134

Exhibit 227: Usage of pay TV satellite Internet.....	135
Exhibit 228: Terrestrial TV viewing.....	136
Exhibit 229: Terrestrial TV viewing by age group	136
Exhibit 230: Terrestrial TV viewing by gender	136
Exhibit 231: Terrestrial TV channels	137
Exhibit 232: Terrestrial TV channels viewed by age group	138
Exhibit 233: Terrestrial TV channels viewed by gender.....	138
Exhibit 234: Radio listening.....	139
Exhibit 235: Radio listening by age group.....	139
Exhibit 236: Radio listening by gender	139
Exhibit 237: Frequency of radio listening.....	140
Exhibit 238: Type of Radio Stations	141
Exhibit 239: Types of radio programs	142
Exhibit 240: Types of radio programs by age group	143
Exhibit 241: Types of radio programs by gender.....	143
Exhibit 242: Location of radio listening	144
Exhibit 243: Location of radio listening by gender	145
Exhibit 244: Location of radio listening by age group	145
Exhibit 245: Satellite radio	146
Exhibit 246: Internet radio.....	147
Exhibit 247: Movies at home	148
Exhibit 248: Movies at home by age group	148
Exhibit 249: Movies at home by gender	148
Exhibit 250: Medium of movies.....	149
Exhibit 251: Going to the movie theatres.....	150
Exhibit 252: Going to the movie theatres by age group.....	150
Exhibit 253: Going to the Movie Theatres by Gender.....	150
Exhibit 254: Frequency of going to movie theaters	151
Exhibit 255: Movie theatres.....	151
Exhibit 256: Movie theaters by age group.....	153
Exhibit 257: Types of movies watched.....	154
Exhibit 258: Daily news updates.....	156
Exhibit 259: Most effective type of ads	157
Exhibit 260: Most effective types of ads by age group	158
Exhibit 261: Most effective type of ads by gender.....	158
Exhibit 262: Satisfaction level of media	159

