

# The Arab World Online 2014: Trends in Internet and Mobile Usage in the Arab Region

Navigating through mounting developmental challenges, the Arab region continues to go through technology-enabled transformations, impacting its economies, societies and governance models. For more than a decade, an increasing number of Arab countries have realized that the 'knowledge economy' fueled by wide adoption and availability of information and communication technologies infrastructure will play an essential role in growth and development. The continued proliferation of Internet connectivity and large-scale adoption of mobile technologies in the Arab region have created new horizons for entrepreneurship and employability in a region suffering from immense economic and developmental challenges.

These ever-changing ICT adoption trends made the 'business case' for delivering services through new mediums. They provided businesses and governments alike, with new channels to reach populations and markets in creative ways. Eventually, these transformations have been coupled with emerging 'smart' models of government-citizen interactions. As such, a critical mass of the population of the Arab world, whether on the scale of individual countries or on a regional level, now has access to services and information in more efficient and cost effective ways, reshaping economic and social models.

Our research indicates that today, there are more than 135 million individuals using the Internet in the 22 Arab countries. This is coupled with a mobile penetration rate of around 110 percent on a regional level; and more than 71 million active users of social networking technologies.

This white paper, in its second edition, is produced by the Governance and Innovation Program at the Mohammed Bin Rashid School of Government in partnership with Bayt.com. It continues to examine Internet and mobile usage trends in the Arab region. The purpose of this series is to provide policy makers, business leaders and development organizations with updated information on the usage trends in an ever-changing 'digital landscape' in the Arab World.

## Introduction:

From less than 1 percent of the world connected to the Internet back in 1995, today the number of Internet users around the world are about to cross the 3 billion users milestone. Meanwhile, the world is about to cross 7 billion mobile subscriptions; almost matching the number of people of the planet. In the Arab region Internet connectivity has transformed the ways in which millions of people do business, learn, socialize and interact with government. While Arab internet users today make up less than 0.5 percent of the global Internet population at best, they have been growing at a faster than average rate in the range of 20 percent annually. Today, our research indicates that the Internet penetration rate in the Arab region as a whole stands at 36 percent. In comparison, around 40 percent of the World's population is connected to the Internet.

With more than 135 million Internet users in the Arab region and more than 71 million of them actively using social media today<sup>1</sup>, many aspects of Arab's lives have been greatly impacted

1. "The Arab Social Media Report" series, Governance and Innovation Program, Mohammed bin Rashid School of Government: [www.ArabSocialMediaReport.com](http://www.ArabSocialMediaReport.com)

by increased internet penetration. Additionally, with around 400 million mobile devices, and millions of other Internet connected 'things' used in the Arab world, the proliferation of ubiquitous digital connectivity is creating new opportunities and challenges for governments, businesses and societies on the economic, social and policy levels<sup>2</sup>. In addition to opening new markets, this critical mass of Internet and mobile users in the Arab region has provided the key foundations for ambitious service delivery initiatives; such as smart government, mobile government, smart cities and technology-enabled citizen engagement initiatives.

It is projected that the Arab World will match the global average of internet connectivity in 2014<sup>3</sup>; a milestone in Internet uptake for the region. While high-income countries in the Arab region have achieved relatively high levels of connectivity and penetration rates, most Arab countries are still lagging behind in terms of accessible broadband connectivity. In the era of 'smart cities' and 'smart government', expanding broadband penetration is becoming one of the pressing developmental frontiers. Increased broadband connectivity promises several developmental opportunities, such as enabling better 'smart' cities infrastructure, driving economic growth, increasing educational and skills development, enhancing job opportunities in particular for youth; and increasing regional trade integrations. In fact, it has been estimated that a 10 percent increase in broadband services penetration can lead to 1.4 percent of GDP growth. However, mobile broadband connectivity in the Arab region is now limited to 25 percent, while fixed broadband subscriptions is only limited to 3 percent, almost half that of even the developing nations ratio of 6 percent<sup>4</sup>.

The economic impact of Internet growth in the Arab region will only increase going forward. For example, in 2020, it is estimated that around 20 percent of the labor market in the Middle East and North Africa region will be related to internet and technology industries<sup>4</sup>. Unlike other mature sectors in Arab economies, these fast-growing industries will provide the majority of the badly needed new jobs.

However, in a region facing mounting social, economic and public service related challenges in terms of access and quality, the barriers ahead are immense<sup>5</sup>. Within most countries in the region, the digital divide is still impacting millions of Arabs<sup>6</sup>, who are deprived of opportunities to access information, jobs, education and services, enabled by Internet connectivity.

Limited availability of relevant Arabic content online is another key barrier facing Arab Internet users. If we take Wikipedia as an example of digital knowledge production, less than 0.9 percent of the 31 million articles created online on that platform in the 285 language, are in Arabic. An insignificant figure, if one considers that the population of the Arab world today is more than 5 percent of the world, not to mention the millions of Arabic language speakers living outside the Arab World<sup>7</sup>. According to our findings in this paper, "accessibility and connectivity", "cost" and "lack of content in my language" were the top three challenges facing internet users in the region.

This white paper aims to complement the picture drawn by international reports and indicators on information and communication technologies. The findings here provide an updated snapshot on the ICT usage trends in the Arab region. If complemented with the hard usage and penetration data compiled by international organizations and local authorities, the full picture can provide a clearer view on the path ahead for policy makers and business leaders.

This white paper examines trends across four dimensions: 1. Access to the internet and internet-enabled devices, 2. Quality and quantity of time spent online, 3. Frequency of internet usage, 4. Attitudes and trends toward internet activities.

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2. Estimates based on "Arab Knowledge Economy 2014", MADAR Research and Development

3. The ITU projects that the Arab region will reach 41 percent penetration in 2014: "The World in 2014: Facts and Figures", The International Telecommunication Union.

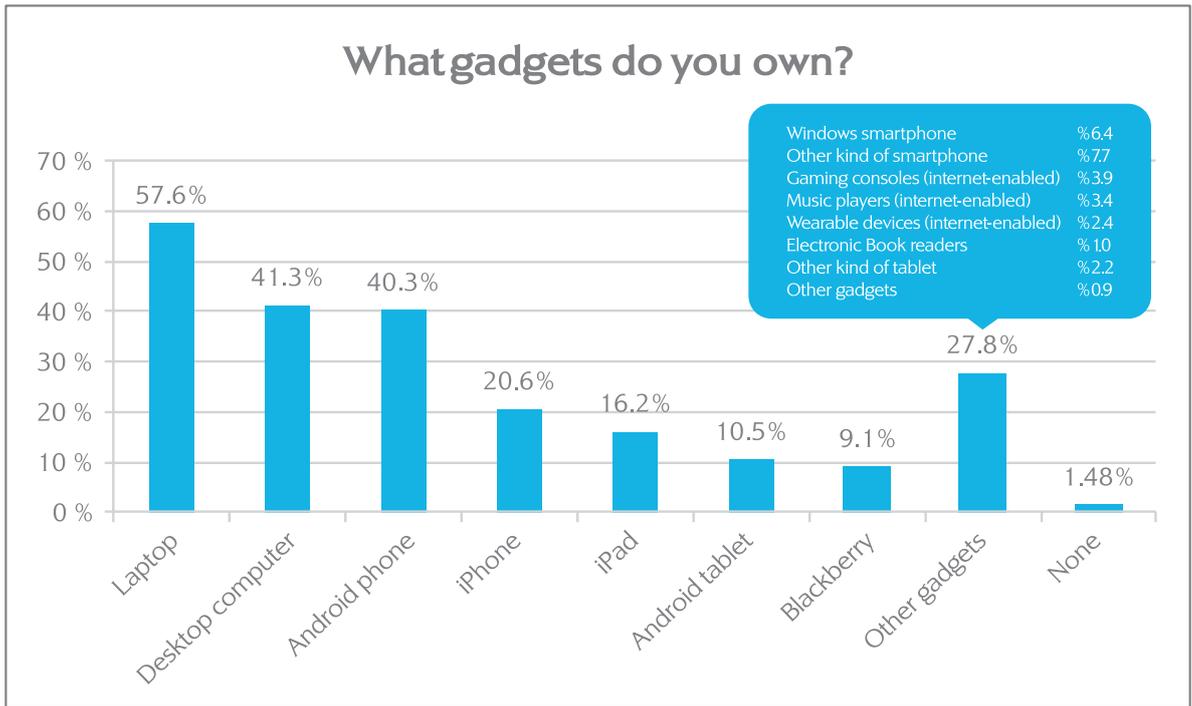
4. "Broadband Networks in the Middle East and North Africa: Accelerating High-Speed Internet Access" The World Bank 2014: <http://www.worldbank.org/en/region/mena/publication/broadband-networks-in-mna>

5. "The Arab Government Services Outlook 2014". *2nd Government Summit*. Dubai: The Governance and Innovation Program, Mohammed Bin Rashid School of Government: <http://bit.ly/1pqvKgX>

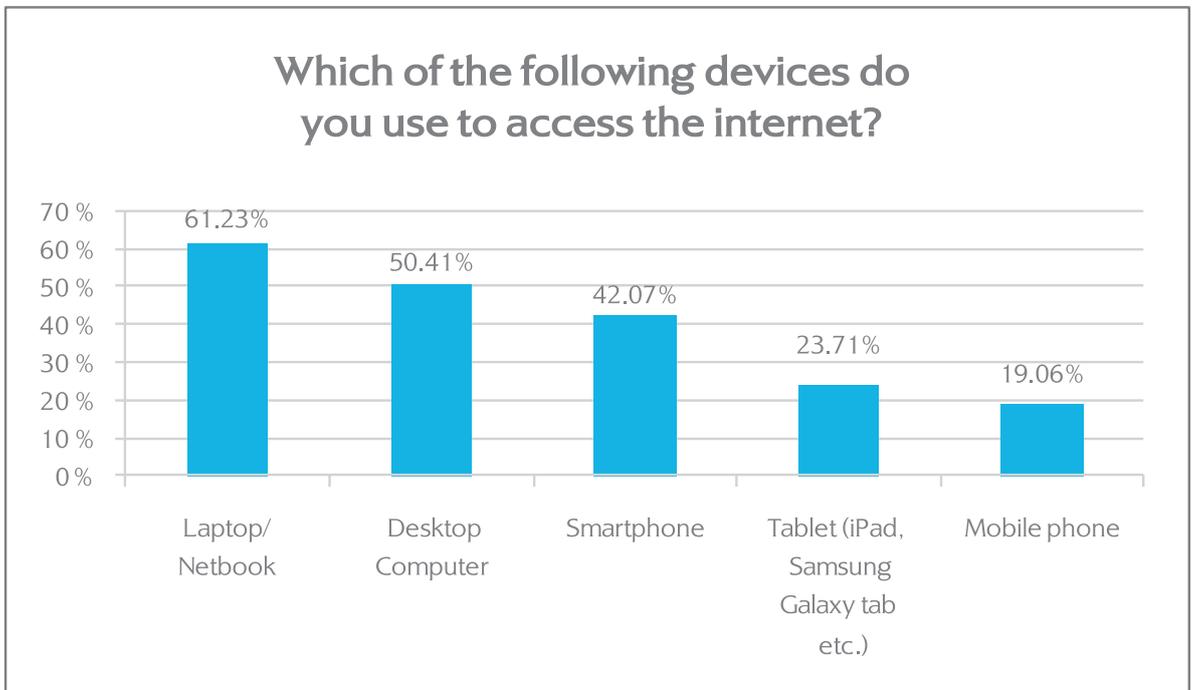
6. "Global Information Technology Report 2014". World Economic Forum: <http://www.weforum.org/issues/global-information-technology>

7. Wikipedia: [http://meta.wikimedia.org/wiki/List\\_of\\_Wikipedias](http://meta.wikimedia.org/wiki/List_of_Wikipedias) - Accessed: May 2014

# Accessing the Internet

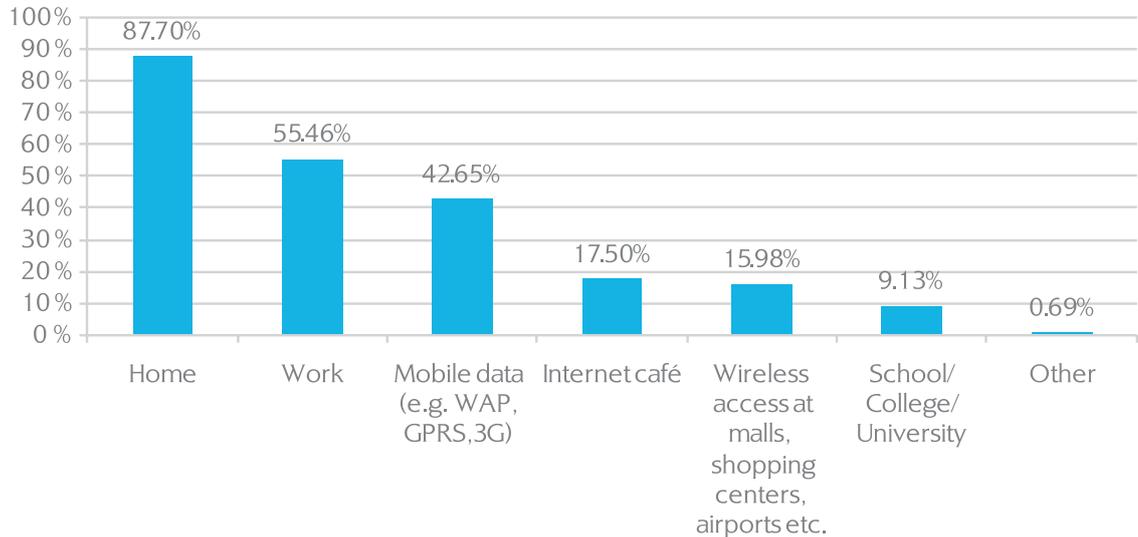


- 99% of respondents indicated owning a laptop or a desktop
- 1.48% do not own a smartphone, tablet, desktop or laptop



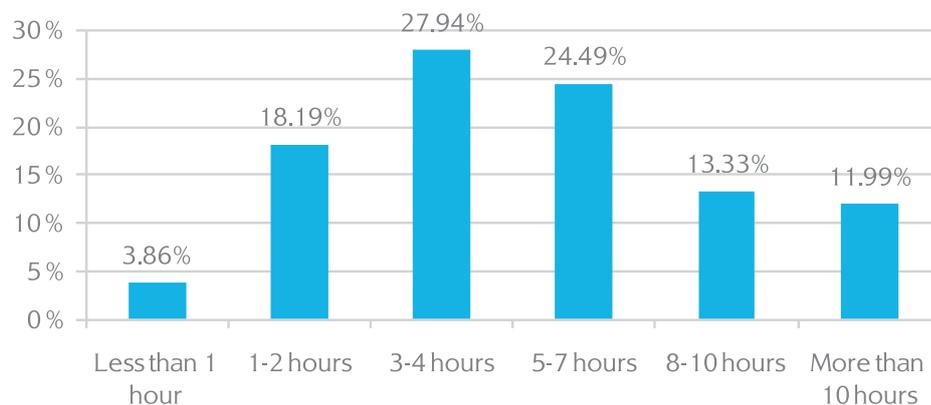
- 61% of respondents access the internet through a laptop and 50% access it through a desktop
- 42% of respondents access the internet through a smartphone and 24% do so through a tablet
- 19% access the internet through a mobile phone

## From which of the following places do you access the internet?



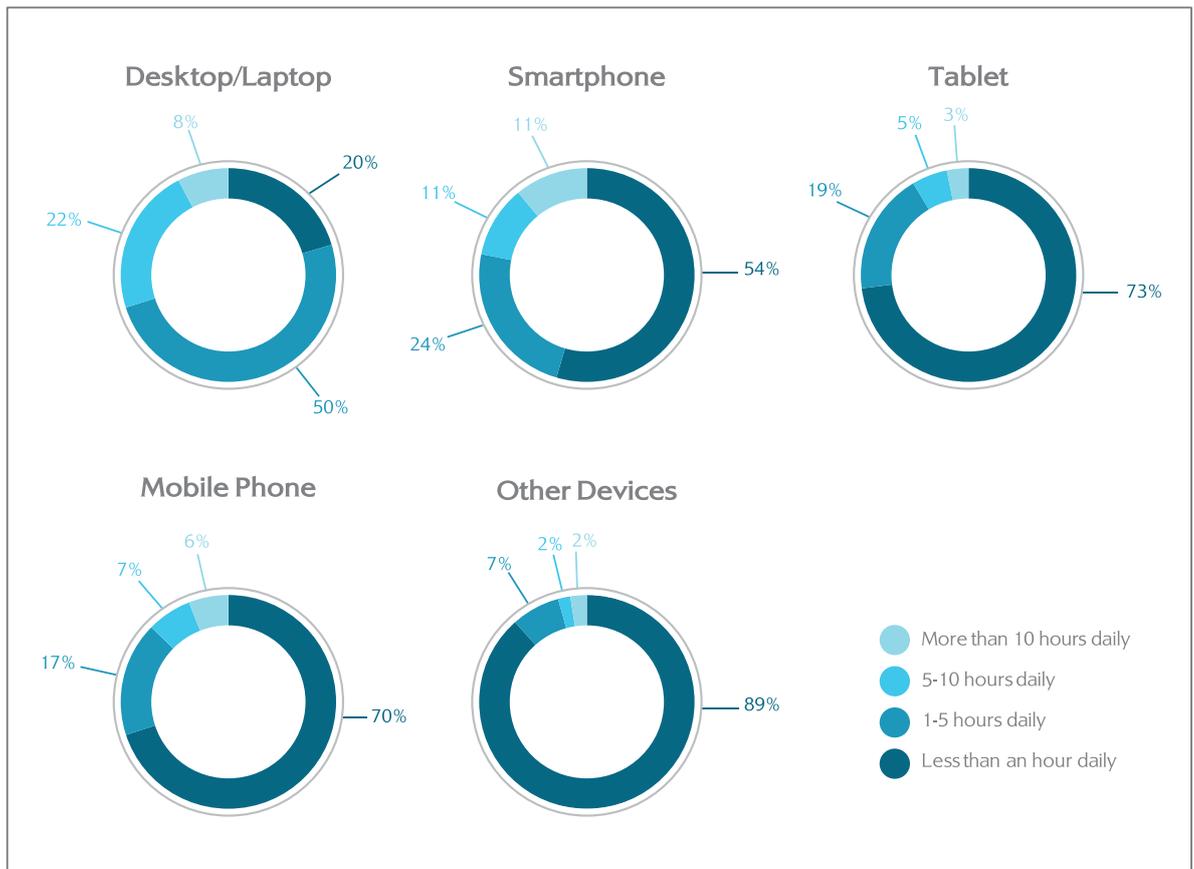
- 88% of respondents indicated that they access the internet from home
- 56% indicated that they access the internet from work
- Only 9% of respondents indicated that they access the internet from school or from university

## How much time do you spend on the internet?

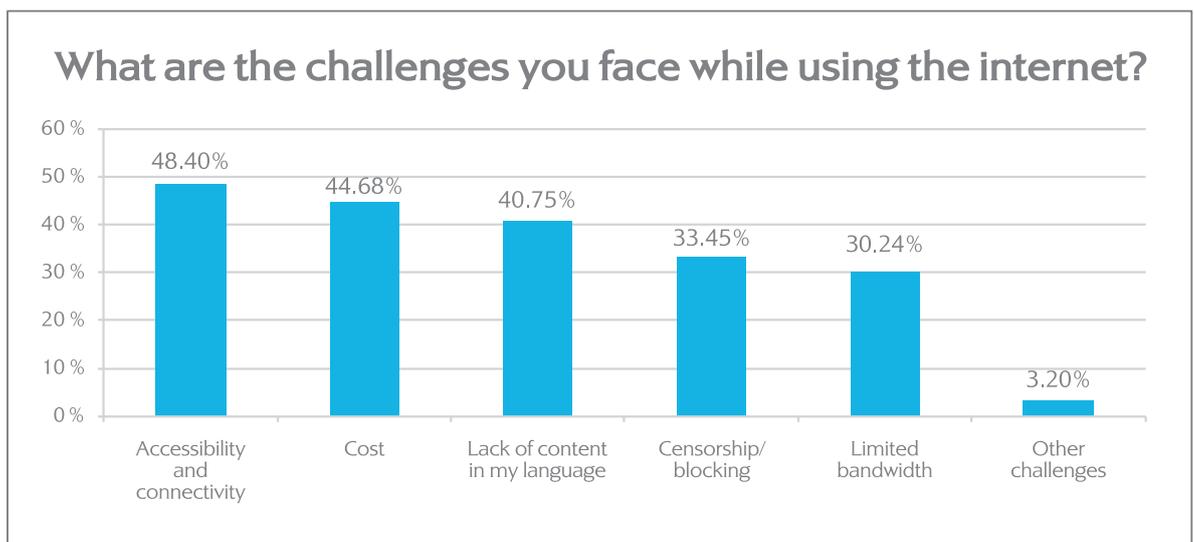


- 28% of respondents indicated spending 3-4 hours on the internet
- Only 12% of respondents spend more than ten hours on the internet
- 4% spend less than one hour on the internet

# Time Spent Accessing the Internet through Various Devices



- 50% of respondents accessed the internet through a desktop or laptop 1-5 hours a day
- 54% accessed the internet for less than an hour daily through their smartphone
- 73% accessed the internet through a tablet less than an hour a day

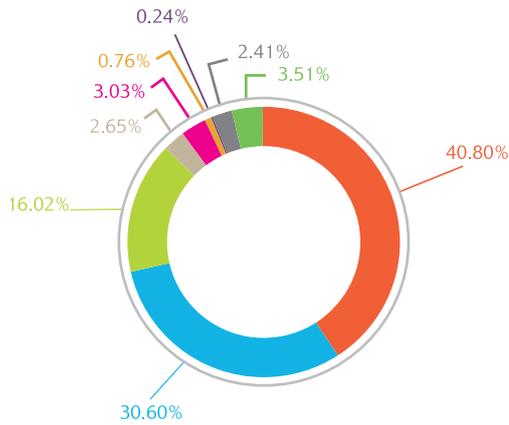


- 48% of respondents indicated that they faced challenges with connectivity and accessibility to the internet
- 45% indicated that cost of internet access was too high
- 41% of respondents indicated that the unavailability of Arabic language content was a challenge for them

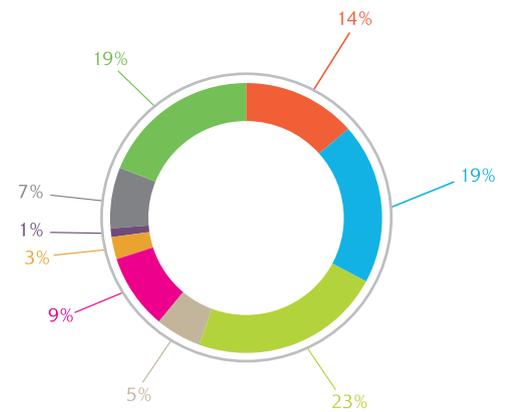
# Time Spent Socializing Online

- 41% of respondents connect with friends on social media several times a day
- 56% connect with friends and family over VoIP (e.g. Skype) several times a week
- 25% of respondents use instant messaging several times a day

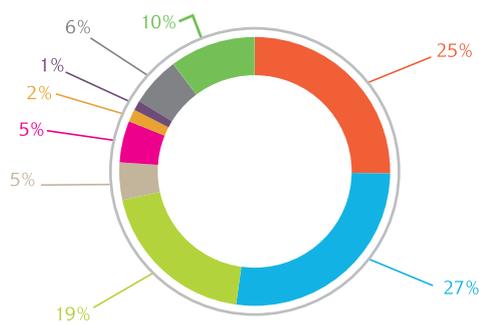
### Connecting with Friends on Social Media



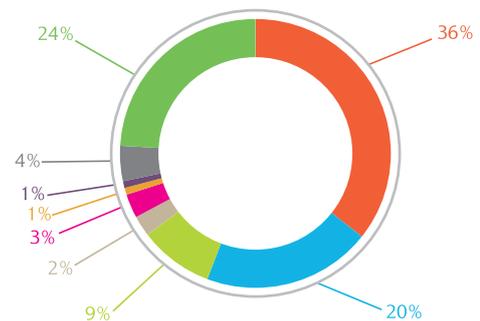
### Communicating with Friends or Family Using VoIP



### Communicating with Friends or Family using Instant Messaging



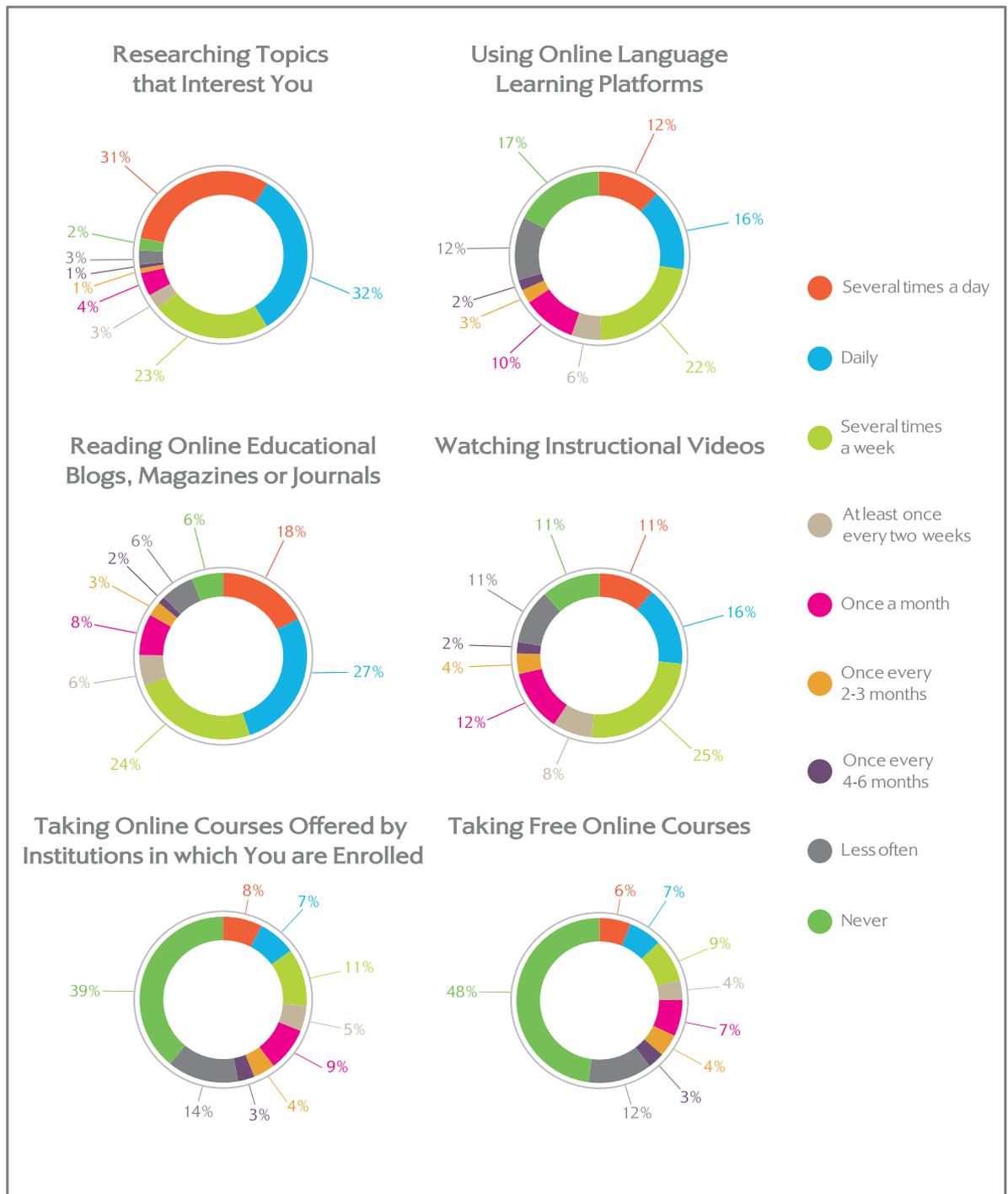
### Communicating with Friends or Family Using Mobile Messaging Apps (Whatsapp, BBM, etc.)



- |  |   |   |
|--|---|---|
| <span style="color: orange;">●</span> Several times a day          | <span style="color: blue;">●</span> Daily           | <span style="color: green;">●</span> Several times a week   |
| <span style="color: brown;">●</span> At least once every two weeks | <span style="color: magenta;">●</span> Once a month | <span style="color: orange;">●</span> Once every 2-3 months |
| <span style="color: purple;">●</span> Once every 4-6 months        | <span style="color: grey;">●</span> Less often      | <span style="color: green;">●</span> Never                  |

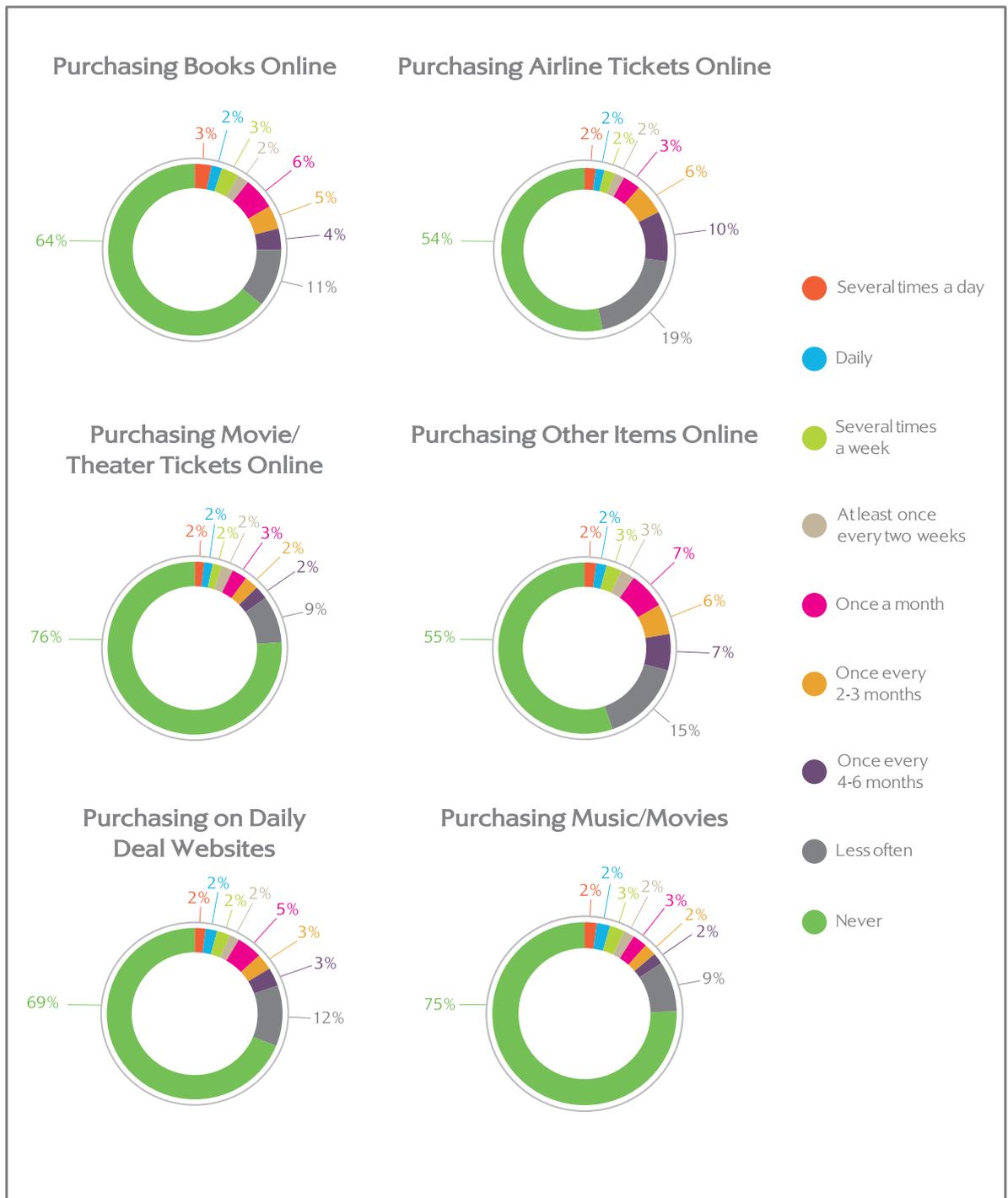
# Time Spent on Online Educational Activities

- 63% of respondents research their interests at least once a day and only 2% have never done so
- 28% of respondents use language learning platforms at least once a day
- 45% of respondents read educational blogs at least once a day
- 27% of respondents watch instructional videos at least once a day
- 15% of respondents have never taken formal online courses offered by their institution
- 48% of respondents have never taken free online courses and 32% do so at least several times a week (with 13 % of those doing so at least once a day)



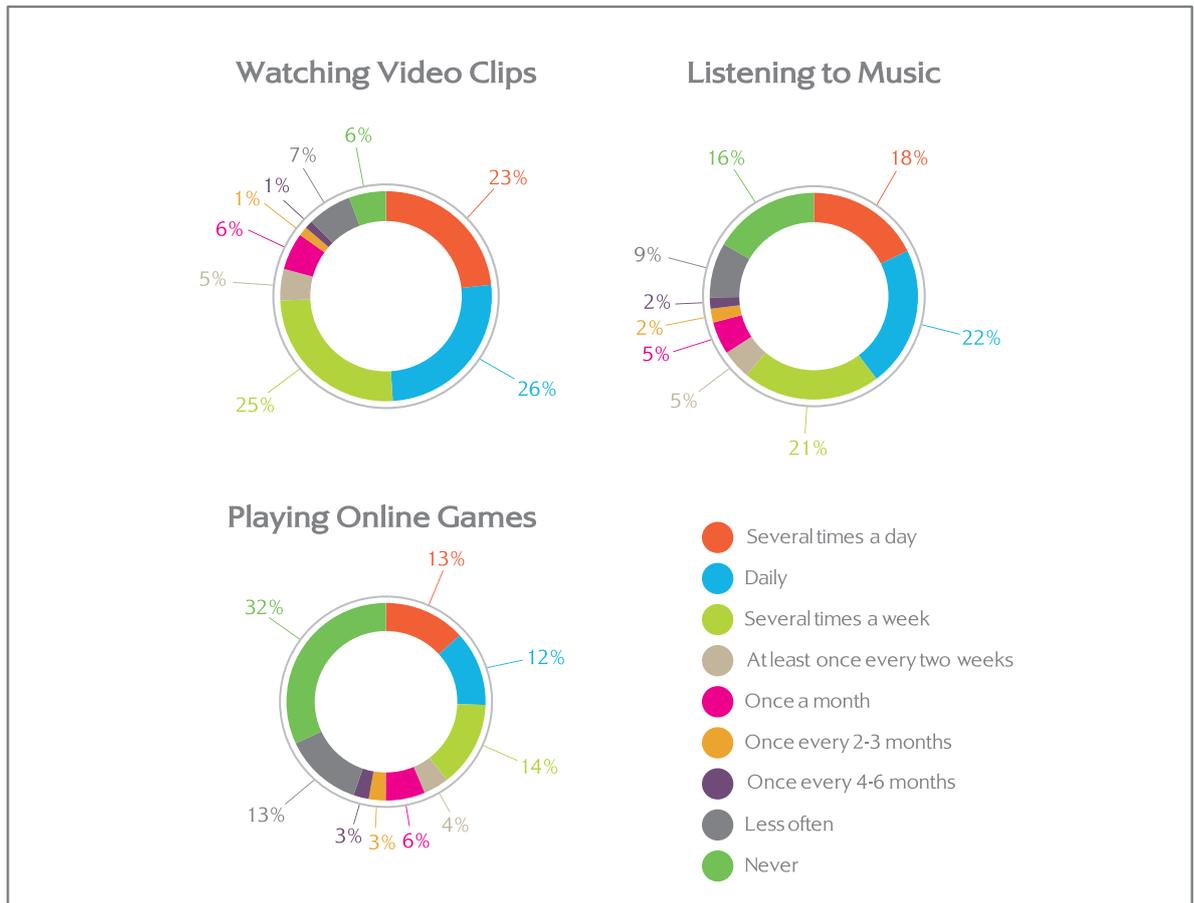
# Time Spent Shopping Online

- Responses to questions regarding online shopping indicate that the majority of respondents to this survey do not shop online.
- 64% of respondents have never purchased books online
- 54% of respondents have never purchased airline tickets online
- 54% of respondents have never purchased movie/theater tickets online
- 76% of respondents have never purchased movie/theater tickets online
- 55% of respondents don't purchase other items online



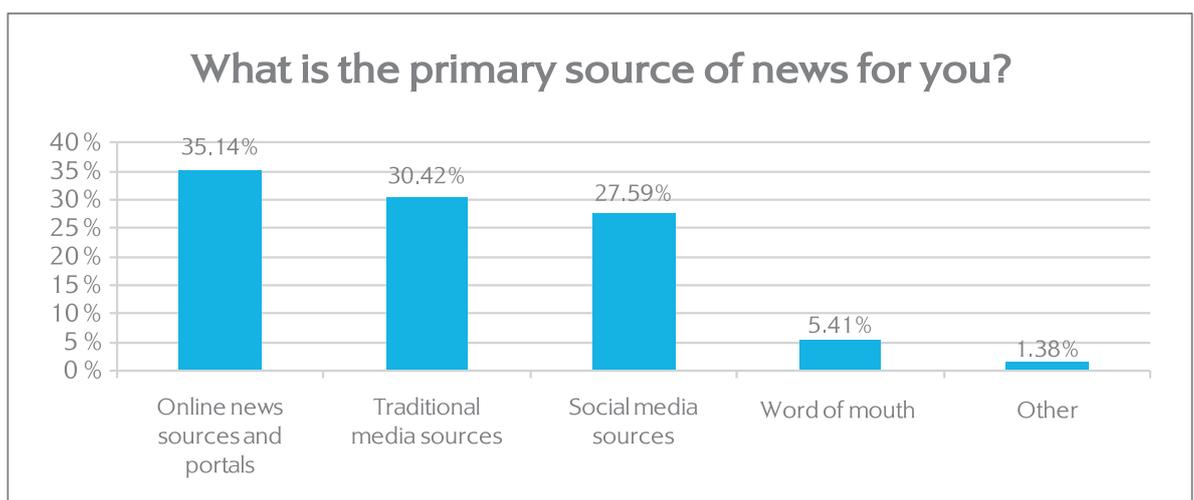
# Time Spent on Online Entertainment

- 49% of respondents watch video clips at least once a day
- 40% of respondents listen to music at least once a day while 16% never listen to music online
- 32% of respondents have never played online games while 25% play online games at least once a day



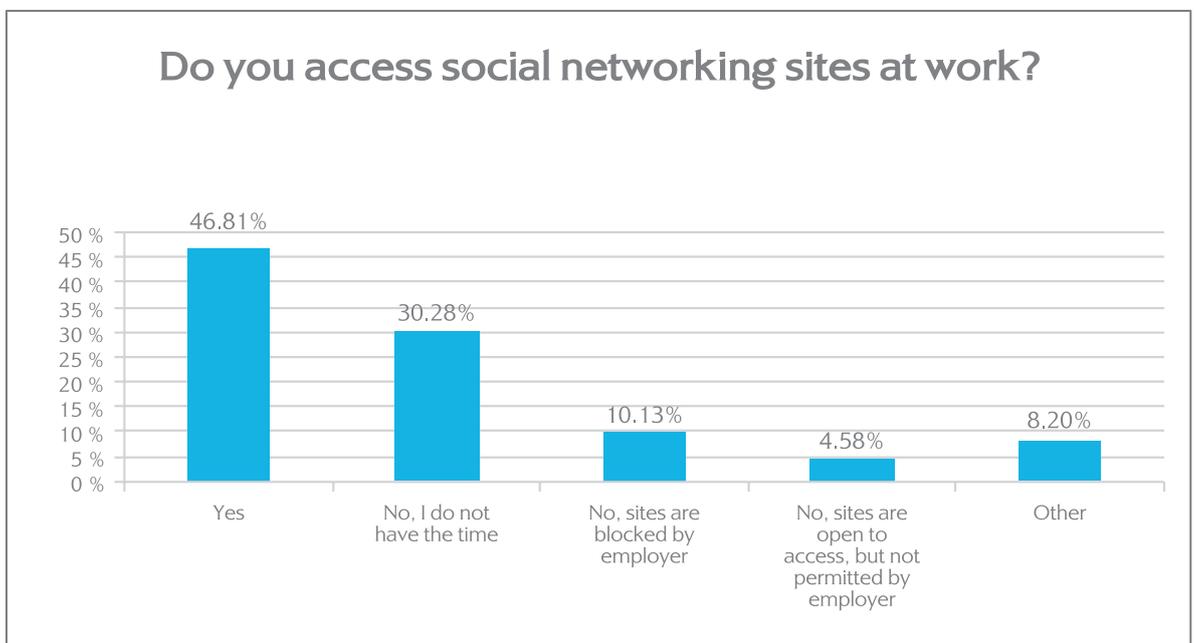
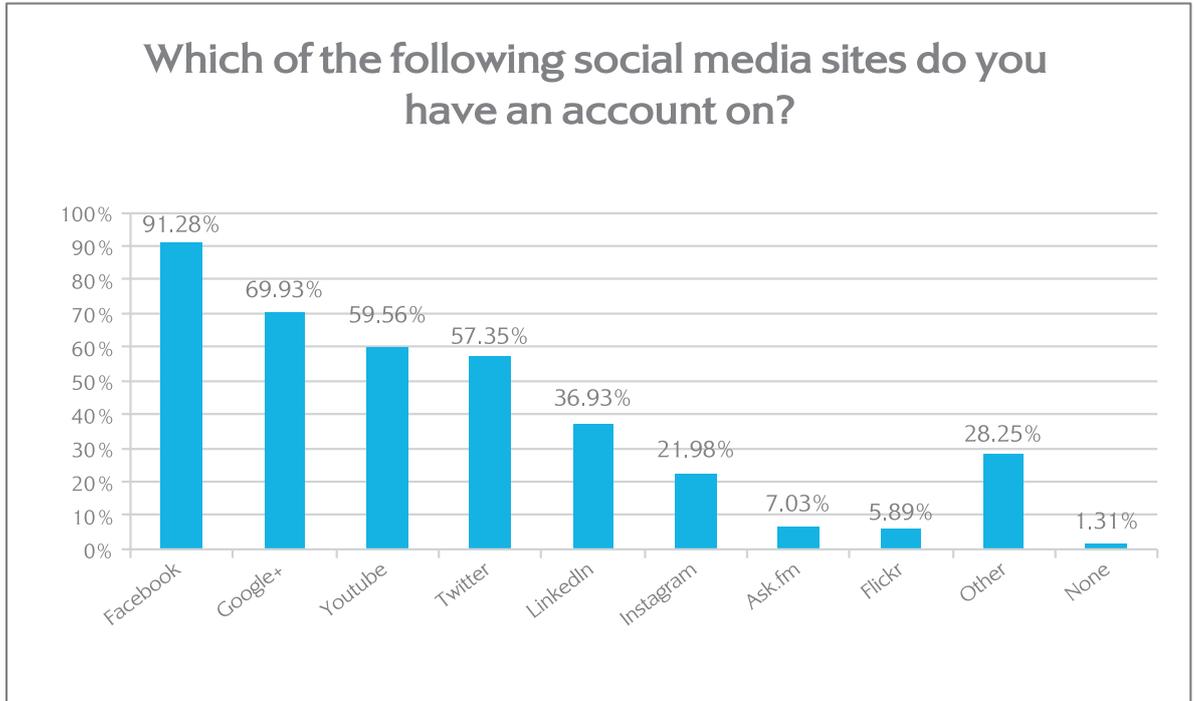
# The Internet as a Source of News on Current Events

- The internet is the primary source of news for 35% of respondents
- 28% get their news from social media while another 30% get it from traditional media sources



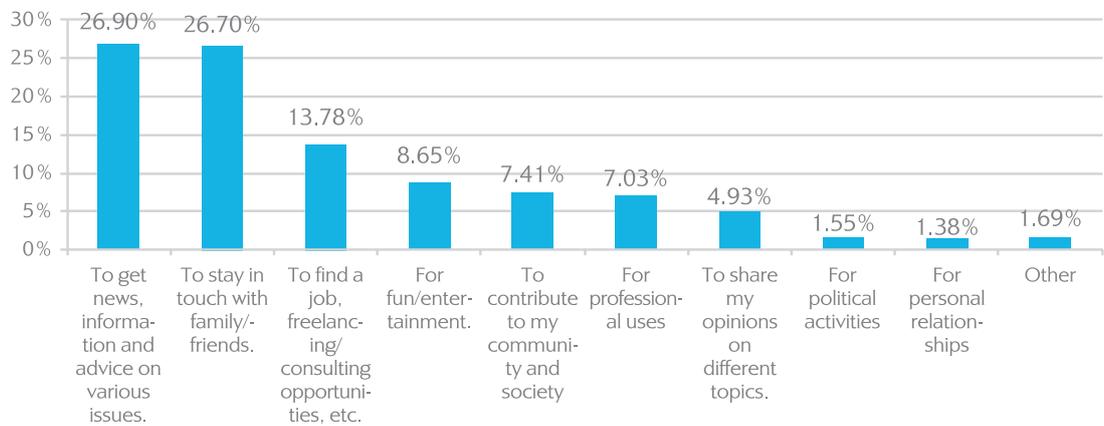
# Social Media Usage Trends

- Facebook (91%) is the most popular social network, followed by Google+, YouTube and then Twitter. Most respondents do not have an account in the other social networks listed.



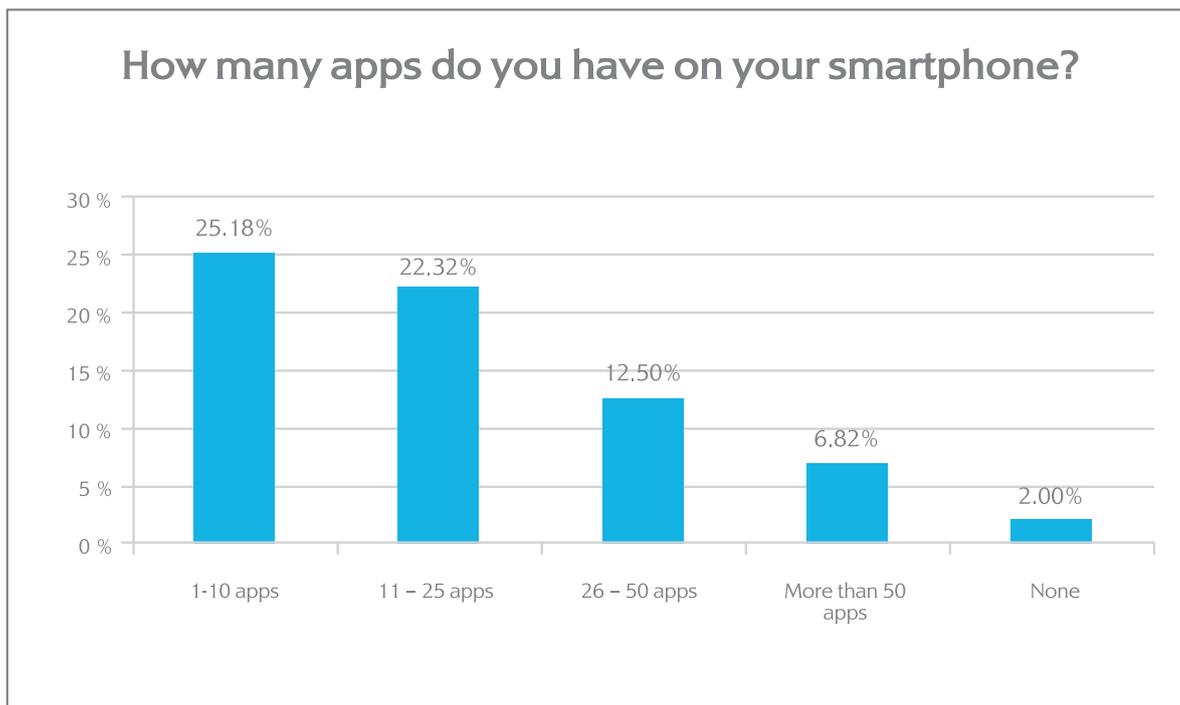
- Almost 50% of respondents access social media sites at work
- 30% indicated that they do not have the time to do so and only 10% indicated that their employers have blocked social media access

## Which of the following statements best describes your use of social networking websites?

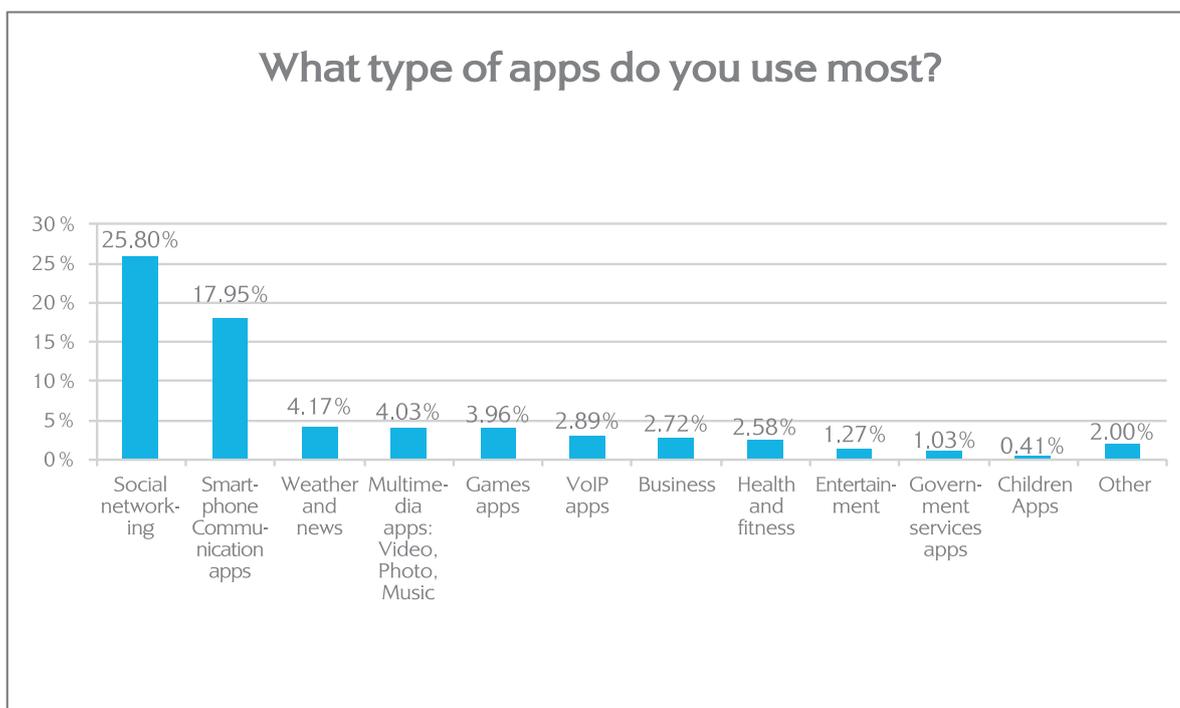


- 27% of respondents use social media to get news and information on various issues
- 27% also indicated that they use social media to stay in touch with friends and family
- Only 7% use it for professional uses and only 14% use it for job hunting or searching
- Less than 5% use it to share opinions or for political activities

# Smartphone Usage Trends

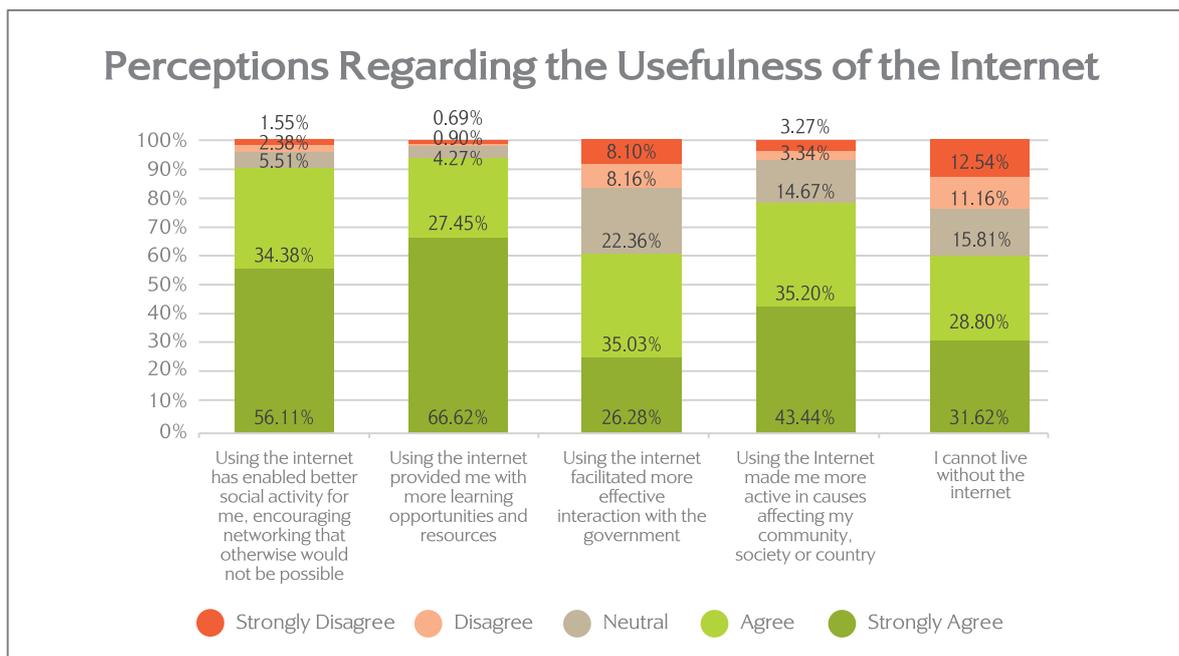


- 25% of respondents indicated having 1-10 applications on their smartphone
- 22% indicated having 11-25 applications on their smartphone and only 2% indicated having no applications on their smartphone

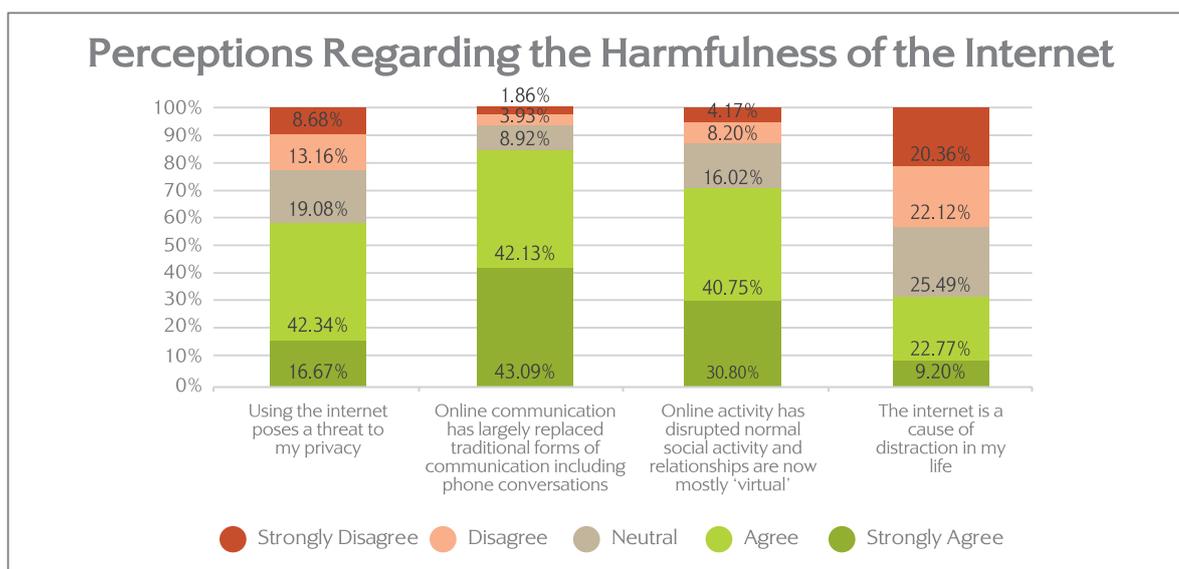


- 26% of respondents indicated that they use social networking applications most frequently
- 18% of respondents indicated using smartphone communication applications most frequently
- Less than 5% of all respondents indicated using weather, news, multimedia, gaming or government applications most frequently.

# Perceptions regarding the Internet

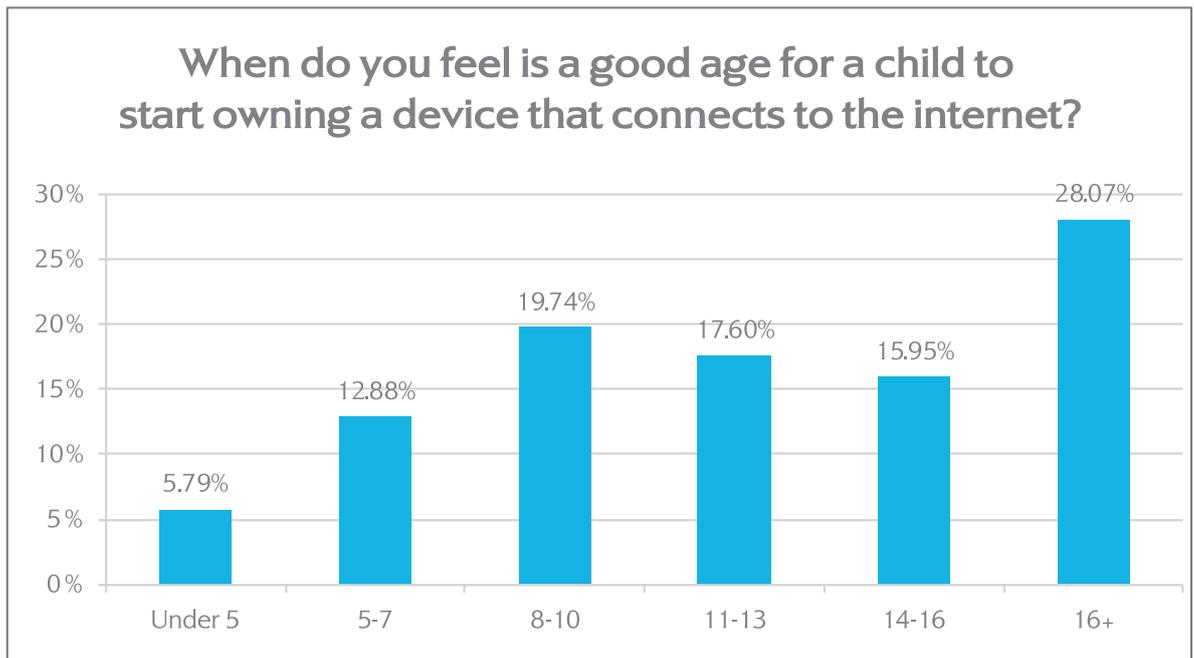


- 94% of respondents indicated that using the internet has improved their social activity
- 94% of respondents agreed that the internet has provided them with more learning opportunities and resources
- 61% of respondents agreed that the internet has facilitated their interactions with government
- 79% of respondents indicated that the internet has made them more involved in their communities
- 61% of respondents agreed that they could not live without the internet

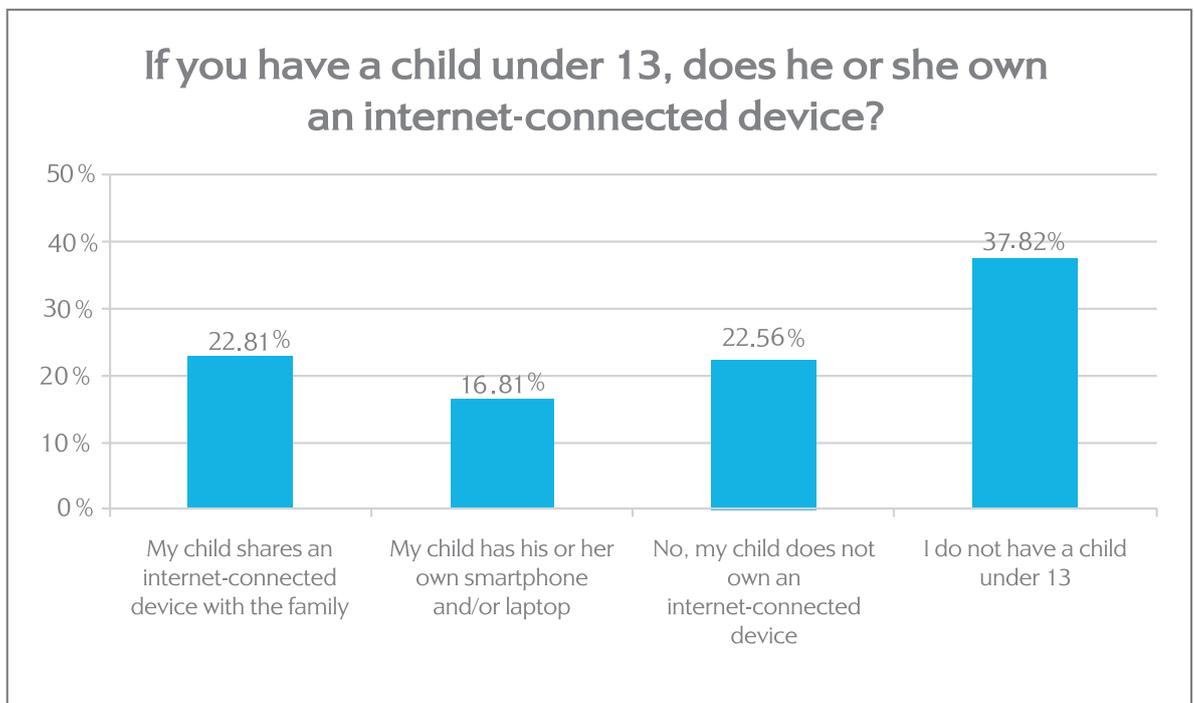


- 59% of respondents agreed that the internet poses a threat to their privacy
- 85% of respondents agreed that online communication has replaced traditional forms of communication
- 72% of respondents agreed that online activity has disrupted normal social activity
- 32% of respondents indicated that the internet is a source of distraction in their lives

## Attitudes towards Children's Use of the Internet



- 28% of respondents believe that children should be allowed to own devices that connect to the internet only after they have reached 16 years of age
- 16% believe that children between the ages of 14-16 should be allowed to do so , 17% believe that children between the ages of 11-13 should be allowed and 20% believe children between the ages of 8-10 should be
- Only 6% of respondents believe children under the age of 5 should be allowed to own devices that connect to the internet



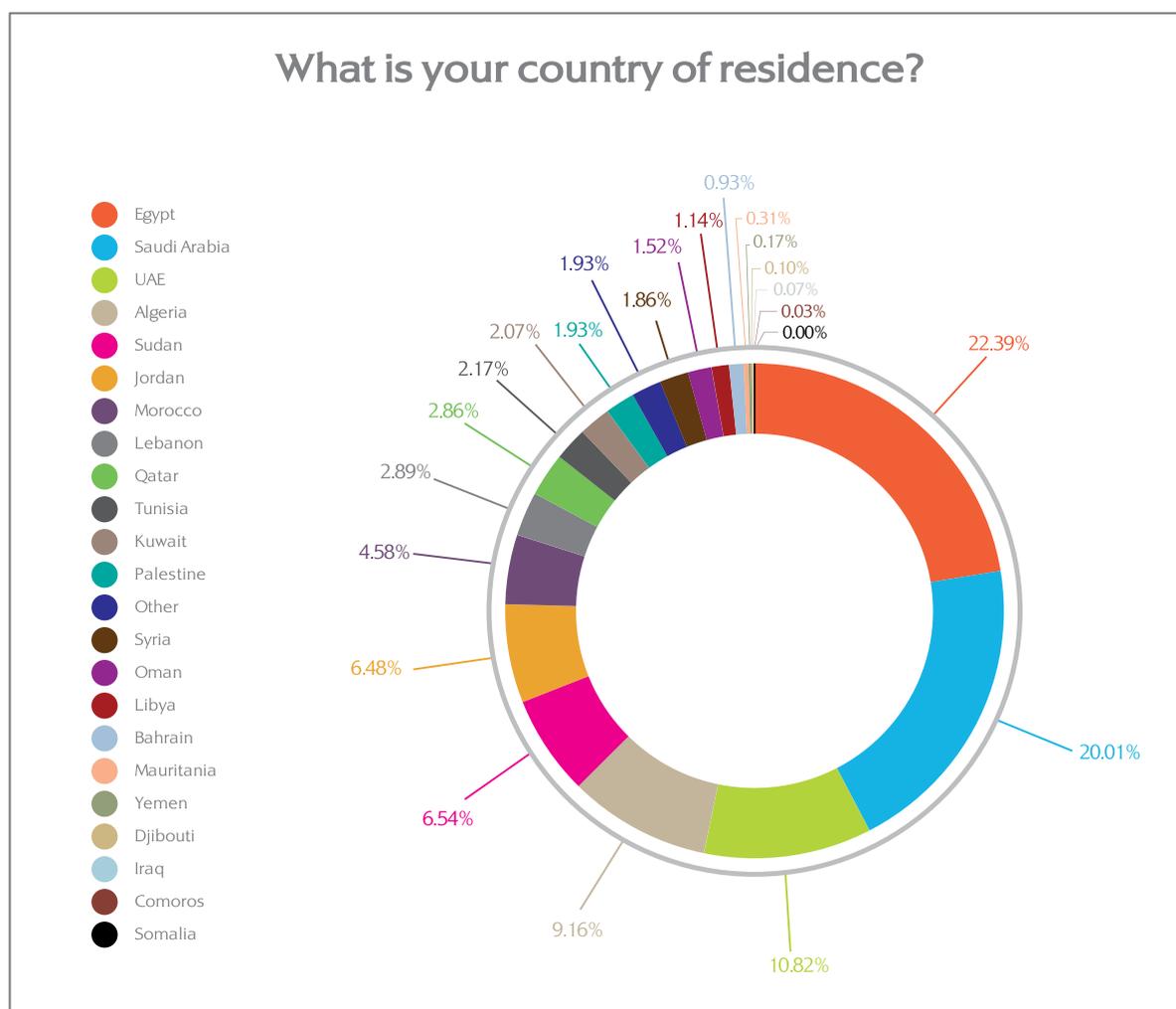
- 23% of respondents who have a child under 13 have not given their child a device that connects to the internet
- 17% of respondents with children under the age of 13 have provided their child with a smartphone or laptop and 23% allow their child to share a family owned internet connecting device

## Survey sample and approach

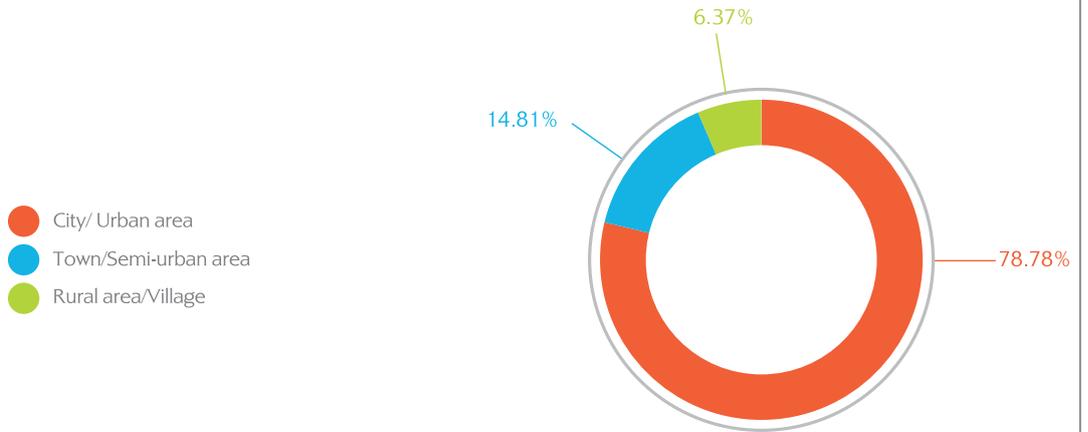
The results reported in this white paper are based on a regional survey administered by the MBRSG's Governance and Innovation Program in collaboration with Bayt.com, targeting residents of 22 Arab countries. The survey fielding was conducted between March and April 2014 with respondents numbered at almost 3000. Responses were received from all countries in the Arab region (Algeria, Bahrain, Comoros, Djibouti, Egypt, Iraq, Jordan, Kuwait, Lebanon, Libya, Mauritania, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Sudan, Syria, Tunisia, UAE and Yemen). The sample consisted primarily of internet users as it was administered via an online survey. 75% of the sample was male and 14% of the sample was between the ages of 15-24 and 44% were between the ages of 25-34. Countries most represented in the sample size are Egypt, Saudi Arabia, Jordan, Algeria, the UAE and Morocco.

This white paper reports the answers from a selected number of questions which are part of a larger survey. The response rate to this survey was 26% with 10985 people having started the survey at the time of cut off.

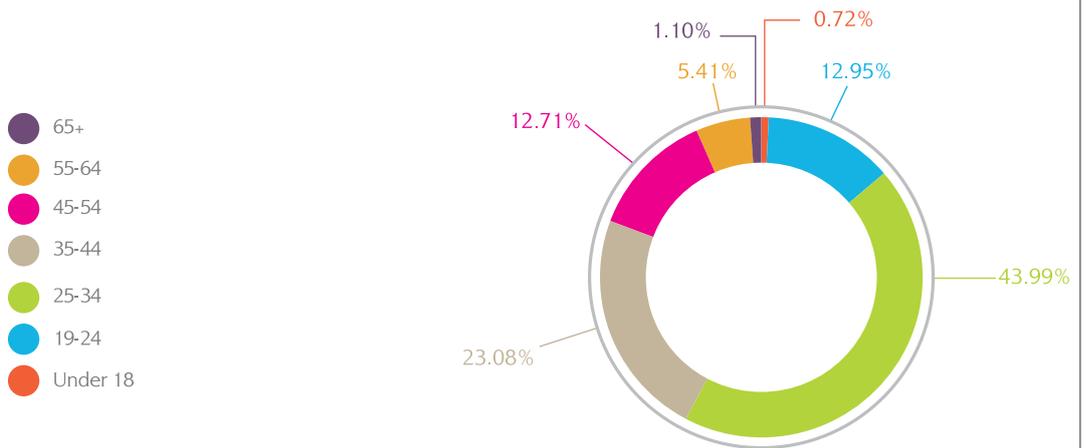
## Demographics



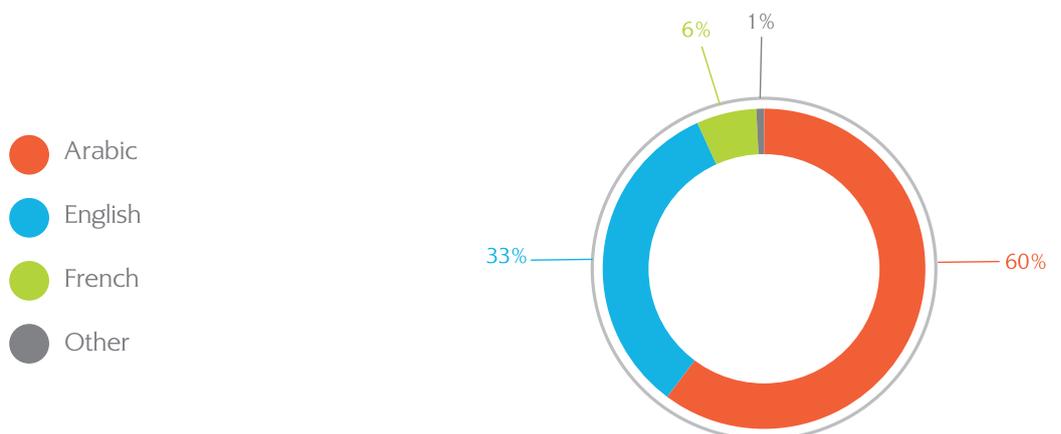
## Urban/Rural Breakdown of Respondents



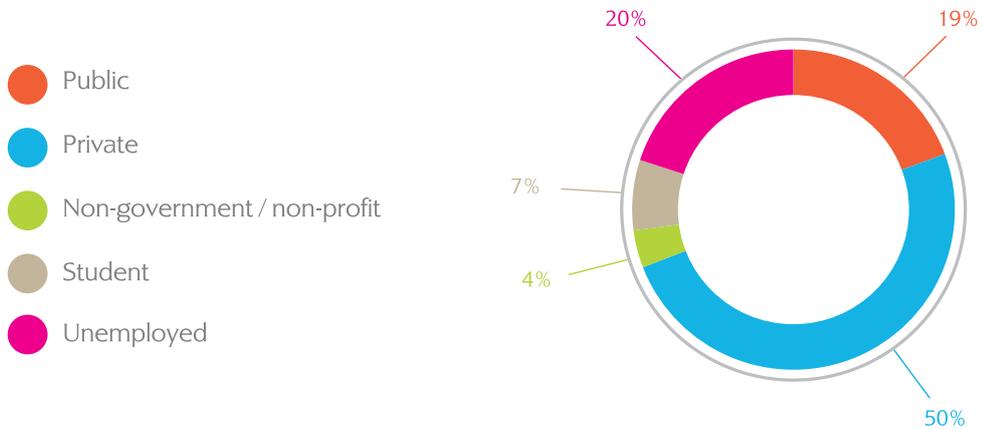
## Age Breakdown of Respondents



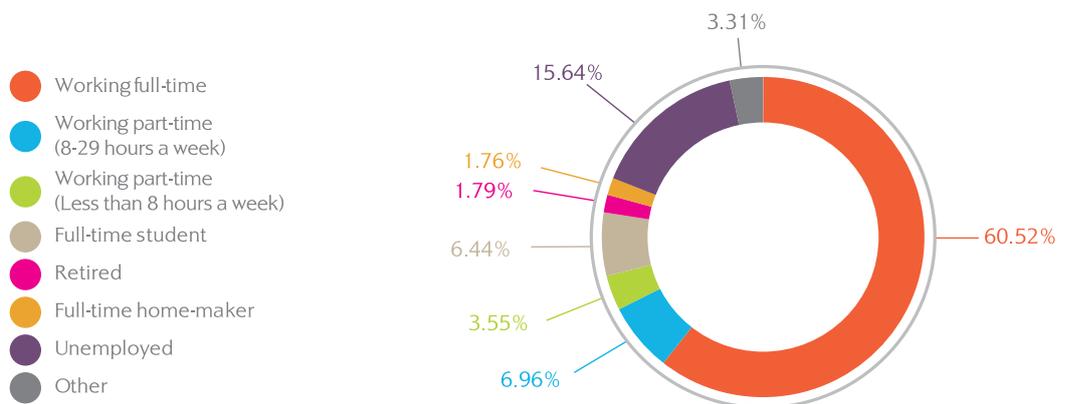
## What is your language of preference while using the internet



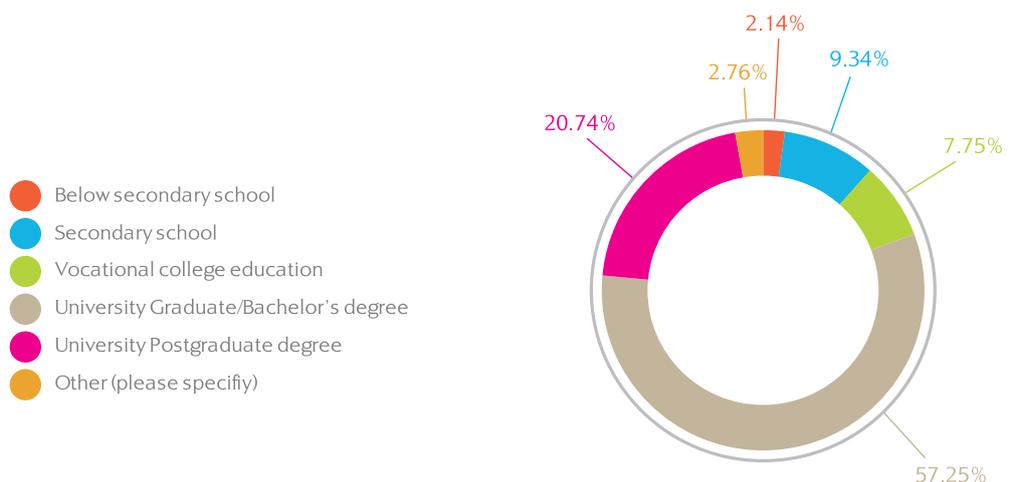
## Sector Representation Among Respondents



## Employment Status of Respondents

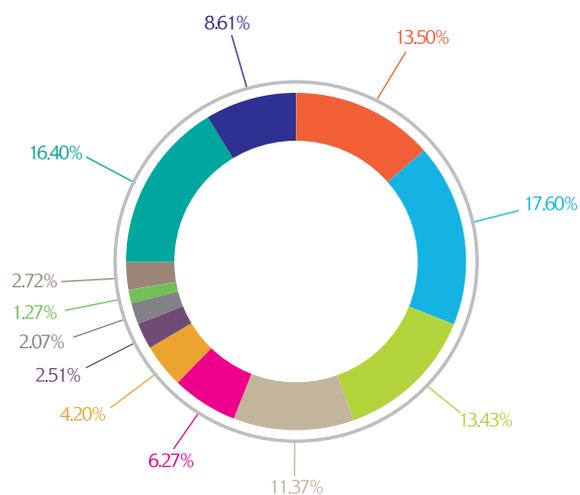


## Respondents' Levels of Educational Attainment



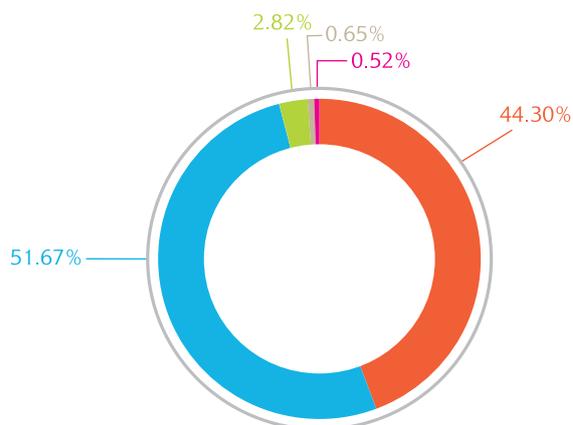
## Respondents' Income Distribution

- Under US\$ 200 per month
- US\$ 200-500 per month
- US\$ 500-1000 per month
- US\$ 1001-2000 per month
- US\$ 2001-3000 per month
- US\$ 3001-4000 per month
- US\$ 4001-5000 per month
- US\$ 5001-6000 per month
- US\$ 6001-7000 per month
- US\$ 7001 or more
- No personal income
- Don't know/Can't say/Don't want to reveal



## Respondents' Marital Status

- Single
- Married
- Divorced
- Separated
- Widowed

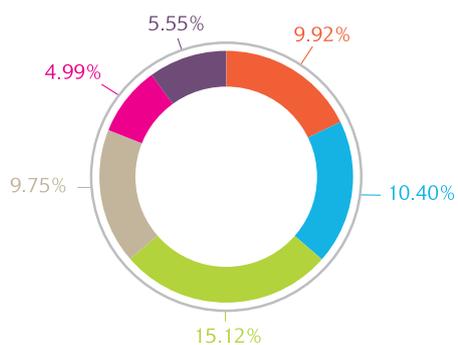


## Gender Breakdown of Respondents



- Female
- Male

## Number of Children Respondents Have



- None
- One
- Two
- Three
- Four
- More than four





## About the Authors

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- **Heba Shaaban**



## The Governance and Innovation Program

The Governance and Innovation Program at Mohammed Bin Rashid School of Government (MBRSG) conducts research and programmatic activities focusing on policies for government innovation and development through information technologies in the Arab states. The objectives of the program are aligned with regional objectives towards nurturing a culture of innovation in society, promoting participatory, inclusive and transparent government models; and enabling more responsive and efficient governance through effective adoption of information technologies. The program works on three tracks:

- **Policy and Scholarly Research:** Conducting research focusing on government policies and societal transformation through technological innovation in the Arab region.
- **Policy Advisory:** The ultimate objective of the Program is to inform present and future Arab policy makers in assessing the impact of the ongoing transformations in their societies and governments; and to help develop locally fitting policies for future governance initiatives.
- **Regional Development Activities:** The Program brings together regional and international networks of practitioners and scholars working in related areas through programmatic and educational activities, in order to encourage proactive regional knowledge sharing and bridge the gap between policy and research.

## The Mohammed Bin Rashid School of Government



كلية محمد بن راشد  
للإدارة الحكومية  
MOHAMMED BIN RASHID  
SCHOOL OF GOVERNMENT

The Mohammed Bin Rashid School of Government (MBRSG) is a research and teaching institution focusing on public policy in the Arab world. Established in 2005 under the patronage of HH Sheikh Mohammed Bin Rashid Al Maktoum, Vice President and Prime Minister of the United Arab Emirates and Ruler of Dubai, MBRSG aims to promote good governance through enhancing the region's capacity for effective public policy.

Toward this goal, the Mohammed Bin Rashid School of Government also collaborates with regional and global institutions in delivering its research and training programs. In addition, the School organizes policy forums and international conferences to facilitate the exchange of ideas and promote critical debate on public policy in the Arab world.

The School is committed to the creation of knowledge, the dissemination of best practice and the training of policy makers in the Arab world. To achieve this mission, the School is developing strong capabilities to support research and teaching programs, including:

- Applied research in public policy and management;
- Master's degrees in public policy and public administration;
- Executive education for senior officials and executives; and,
- Knowledge forums for scholars and policy makers.

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