The Arab World Online: Trends in Internet Usage in the Arab Region

Over the past 15 years, the Arab region has witnessed major technology-led transformations which changed the norms of doing business, practicing governance and carrying out development efforts in the region.

With more than 125 million individuals using the Internet in the Arab region, and more than 53 million actively using social networking technologies, the DSG Governance and Innovation Program in partnership with Bayt.com conducted a regional survey to examine internet usage trends in the Arab region.

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 social media.

Introduction:

Since its commercialization and institutionalization in the 1990s the internet has transformed the ways in which we learn, socialize, do business and govern. Today, there are an estimated 2.5 billion people connected via the World Wide Web around the world, in addition to 9 billion "things" connected to the Internet. The internet has been described as the single most important invention of the 21st century and as an equalizer that facilitates access to information and resources. Additionally, with more than 125 million Internet users in the region; and more than 53 million of them actively using social media today, social connections have been greatly influenced by the internet. The proliferation of ubiquitous social networking technologies is creating new frontiers for governments, businesses and societies. Once again, the internet is re-shaping societies and economies in the Arab region in new ways[1].

Just as individuals have become dependent on the internet to supplement communications and social activity, the economy has been affected by the internet in nearly every sector. The internet has made "hard-to-find data" accessible and transformed entire industries, as is occurring with media, education, music, entertainment, software and publishing. Business had to develop new ways of working and interacting with customer base which has led to increased efficiency and growth[2]. Online businesses are driving economic growth globally, with the internet accounting for 20% of economic growth from 2006 to 2011[3]. More recently, social media has enabled the creation of new economic opportunities globally and in the Arab region[4].

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1. The Arab Social Media Report series, Governance and Innovation Program, Dubai School of Government: www.ArabSocialMediaReport.com
2. OECD Internet Economy Outlook 2012, OECD Publishing
3. Internet Matters: The Net's sweeping Impact on Growth, Jobs, and Prosperity. 2011, McKinsey Global Institute.
4. Social Media, Employment and Entrepreneurship New Frontiers for the Economic Empowerment of Arab Youth. Governance and Innovation Program, Dubai School of Government, in Partnership with SAP. 2012

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Governments have not been left behind. Many governments all over the world are providing e-government services and devising their service delivery strategies around the internet and the ways in which it can facilitate service design and delivery as well as internal communications and collaboration[5]. The internet has enabled governments to design services around the citizen by treating citizens as customers and providing quick and accessible services that bypass traditional government bureaucracy[6].

Though the internet has wide-ranging benefits, these benefits do not reach large segments of societies in the Arab region. The digital divide remains a significant barrier for many people. In many parts of the Arab world levels of educational attainment, economic activity, standards of living and internet costs still determine a person's access to life-changing technology.

The combination of improved internet infrastructures, wider network coverage and affordable devices and connectivity options, has increased internet penetration world-wide. The Arab region is no exception. Today the Arab region has more than 125 million internet users with a growth rate close to 30% on average annually. In 2012, Countries like the UAE, Bahrain, Qatar and Kuwait achieved penetration rates above 50 percent, while on average regional penetration rates stood around 28 percent. Though countries like Morocco, Sudan and Yemen have some of the lowest penetration rates in the region, they also had some of the highest growth rates in the region[7].

Findings:

Accessing the Internet
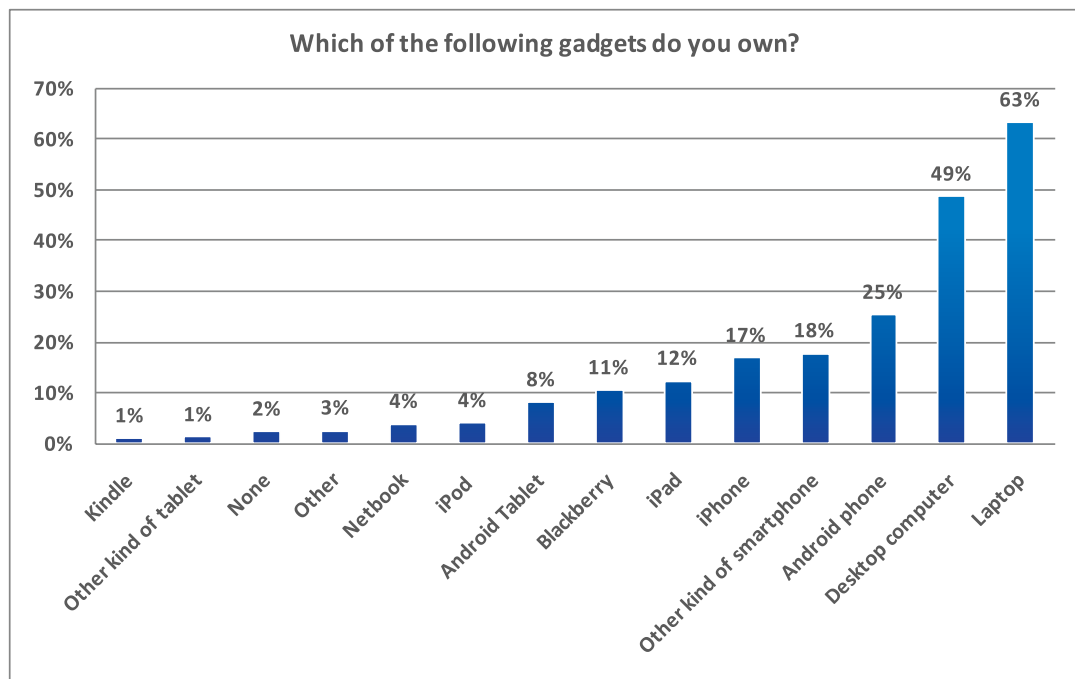
- 63% of respondents indicated owning a laptop, 49% own a desktop
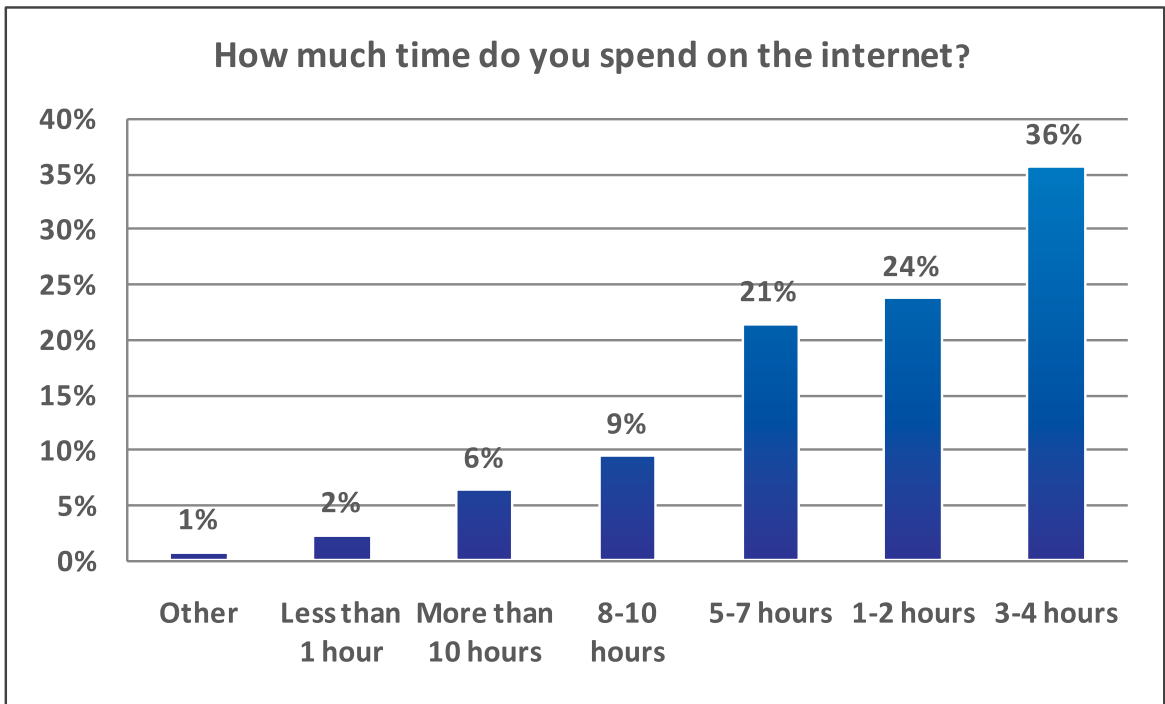- 2% do not own a smartphone, tablet, desktop or laptop
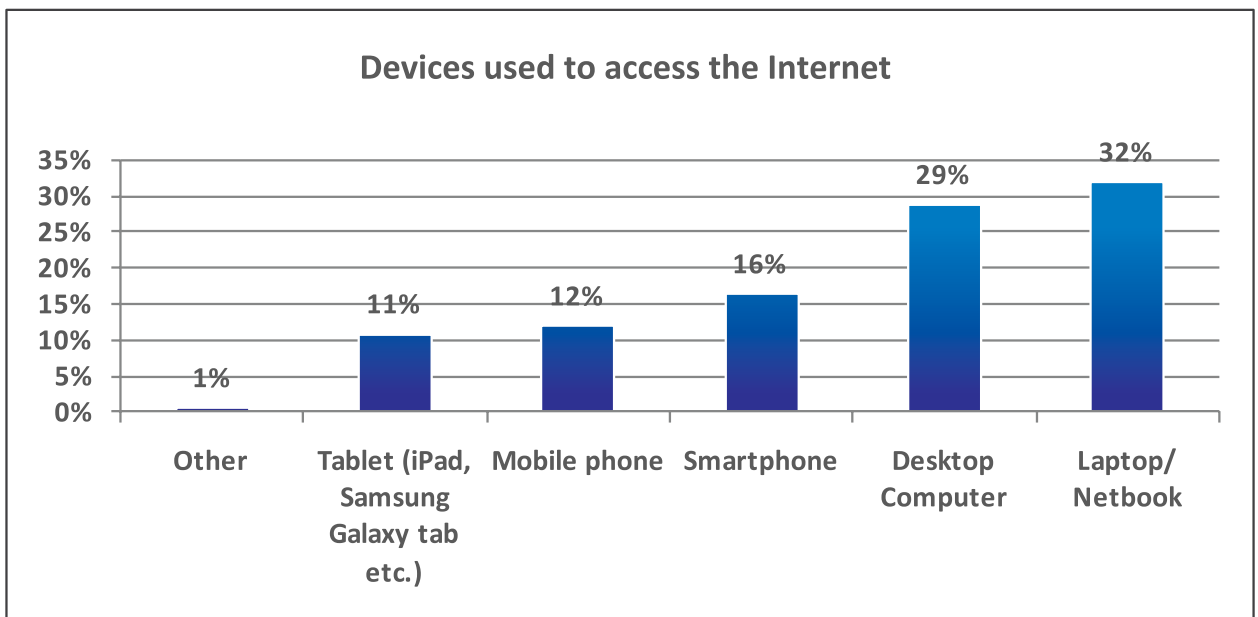
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5. New Frontiers for Citizen Engagement: Impact of Social Media on Public Services in the UAE Federal Government. Governance and Innovation Program, DSG, in Partnership with the UAE PMO. 2013
6. UN e-Government Survey 2012
7. Estimates based on Arab ICT Use Report 2012, MADAR Research and Development.

How much time do you spend on the internet?

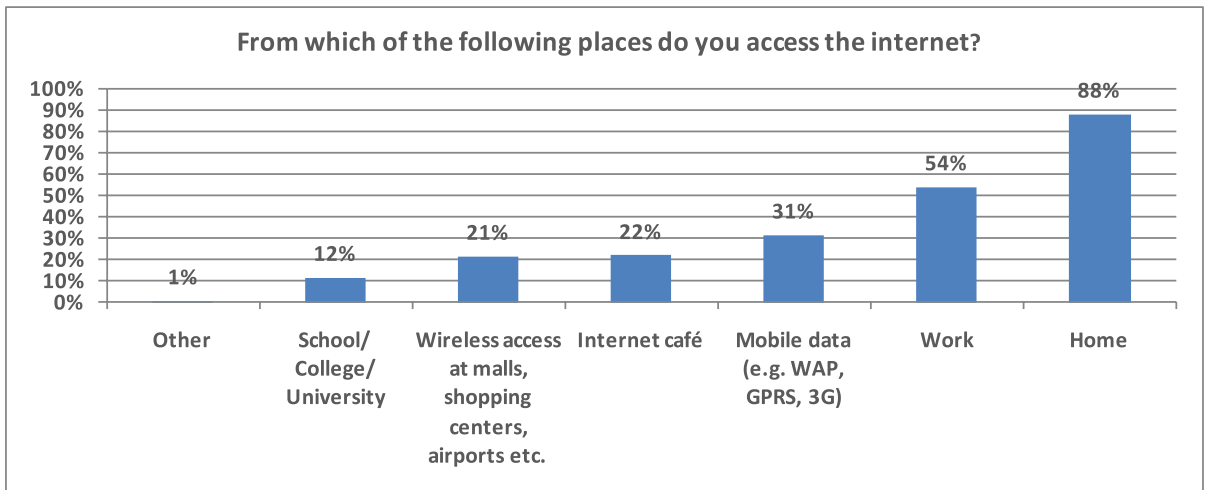| Category	Percentage
Other	1%
Less than 1 hour	2%
More than 10 hours	6%
8-10 hours	9%
5-7 hours	21%
1-2 hours	24%
3-4 hours	36%

- 36% of respondents to this survey spend 3-4 hours on the internet
- Only 6% spend more than ten hours on the internet
- 2% spend less than one hour on the internet

Devices used to access the Internet

Category	Percentage
Other	1%
Tablet (iPad, Samsung Galaxy tab etc.)	11%
Mobile phone	12%
Smartphone	16%
Desktop Computer	29%
Laptop/Netbook	32%

This chart describes the frequency of responses to each of the provided options in a multi-choice question. Here, the devices are ranked based on their relative to one another.

- 61% of the internet through a laptop or desktop
- 16% the internet through a smartphone and 11% do so through a tablet
- 12% the internet through a mobile phone
- In absolute terms, 69% of all respondents to this survey said they used a laptop to access the internet, 62% use a desktop computer, 36% use a smartphone, 25% use mobile phones, 24% tablets and 1% use other technologies to access the internet.

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

Category	Percentage
Other	1%
School/ College/ University	12%
Wireless access at malls, shopping centers, airports etc.	21%
Internet café	22%
Mobile data (e.g. WAP, GPRS, 3G)	31%
Work	54%
Home	88%

- 88% of respondents to this survey indicated that they access the internet from home
- 54% indicated that they access the internet from work
- Only 12% of respondents indicated accessing the internet from school or university.

Do you access social networking sites at work?

Category	Percentage
No, sites are open to access, but not permitted by employer	4%
Other (please specify)	7%
No, sites are blocked by employer	13%
No, I do not have the time	33%
Yes	43%
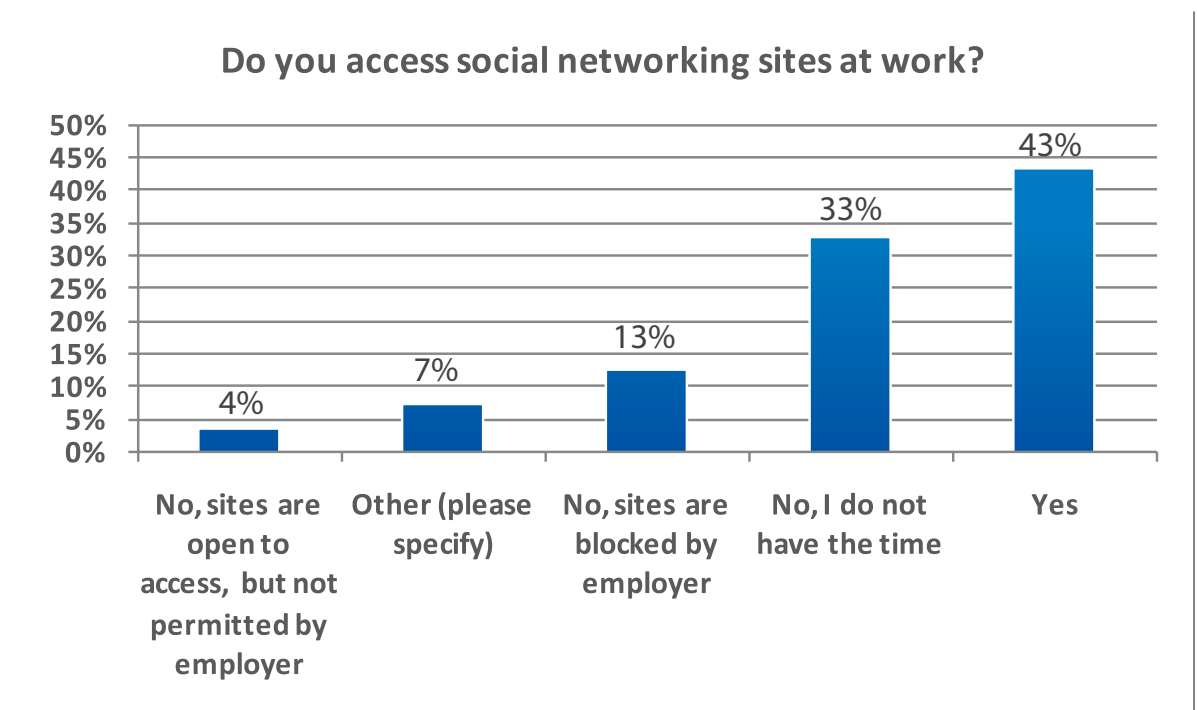
- 43% of respondents accessed social media at work, while 17% of respondents said it was not permitted or blocked.

Spending Time Online

When are you most likely to spend the most time online

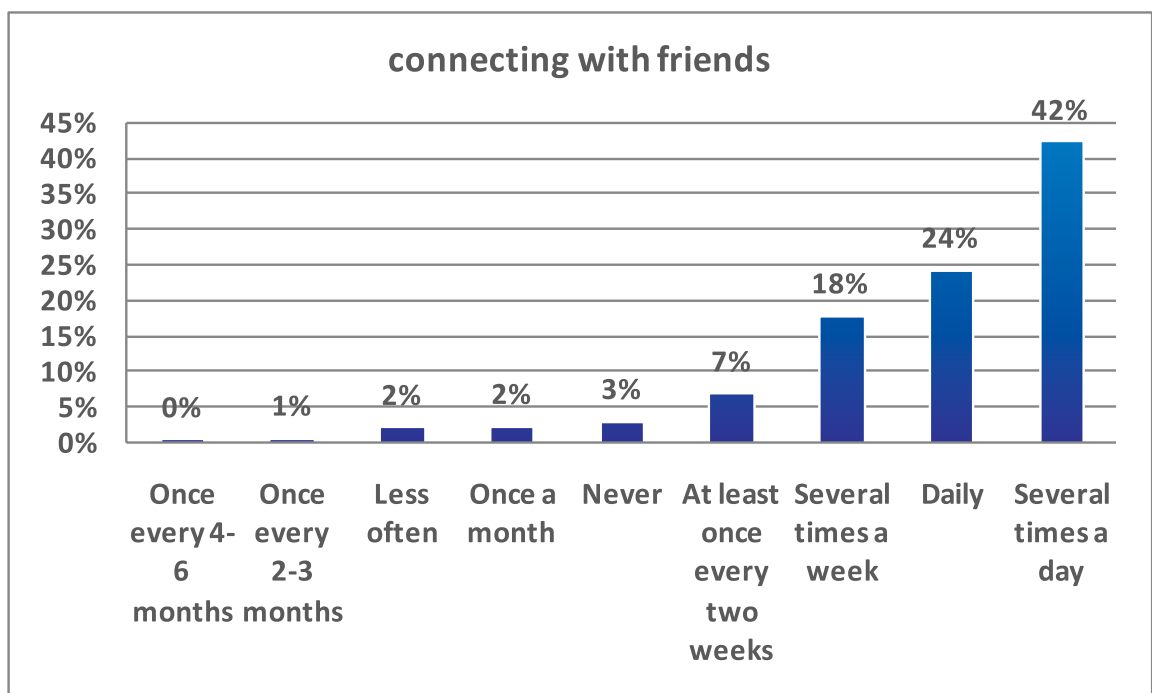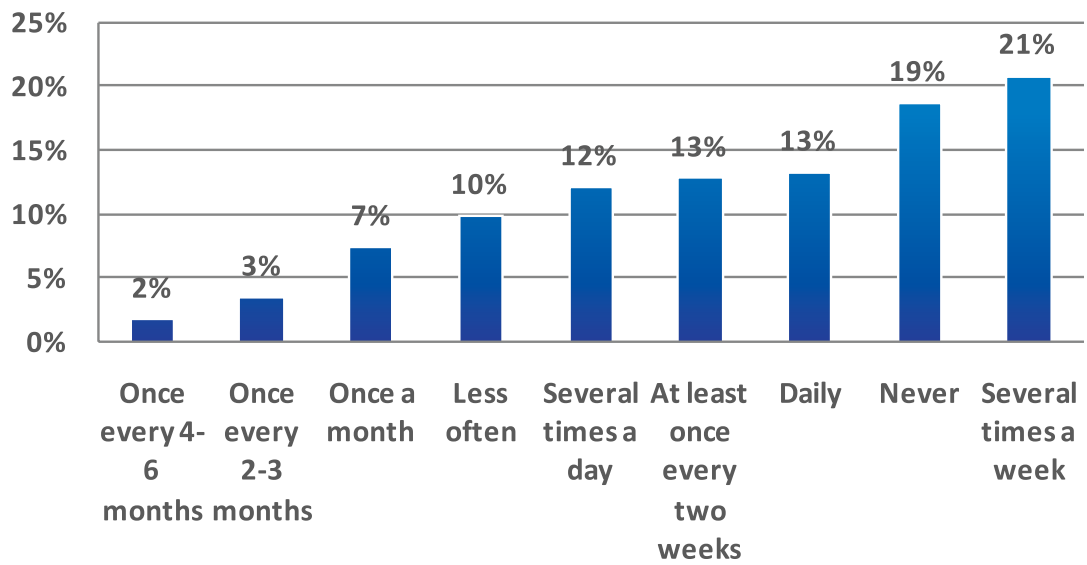| Category	Percentage
During lunch breaks at work	3%
Holidays	6%
Weekends	6%
Other	8%
12PM - 6PM on workdays	13%
8AM - 12PM on workdays	16%
After 10PM on workdays	19%
6PM – 10PM on workdays	30%
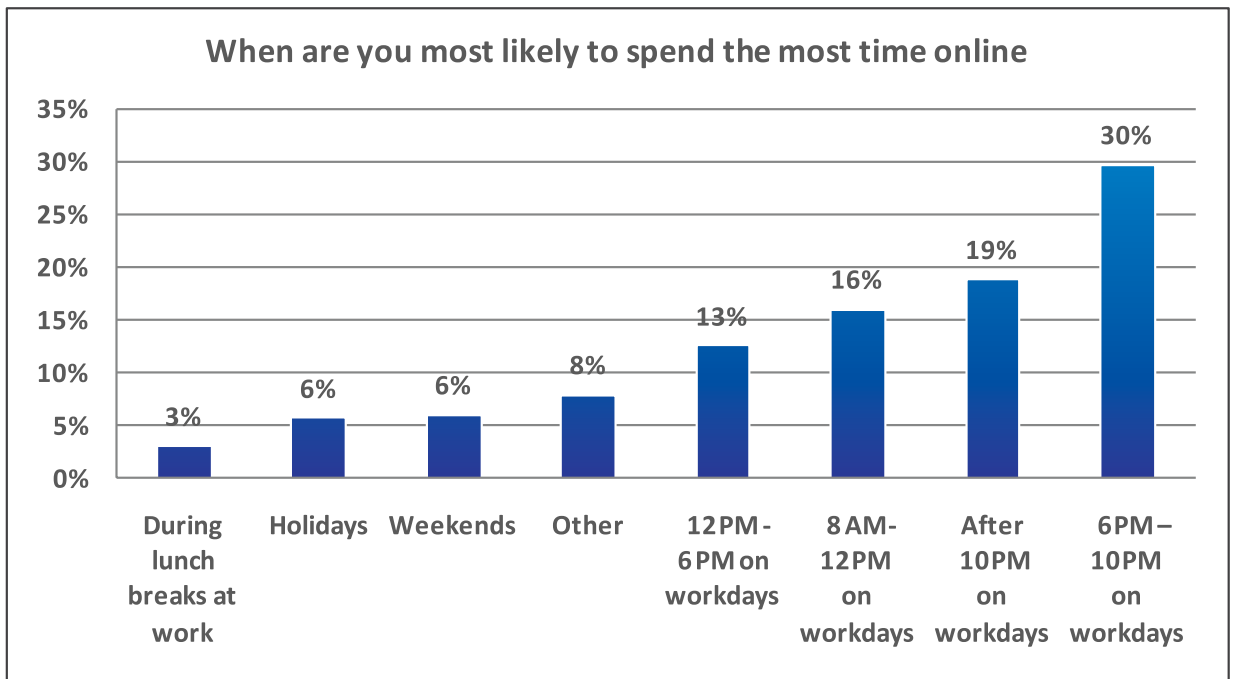
- 49% of respondents spend most of their time on the internet after 6pm on workdays
- 16% spent most of their time on the internet between 8am and 12 pm on workdays
- 13% spend most of their time on the internet between 12pm and 6pm on workdays

Time spent socializing online

- 43% of respondents connect with friends over the web several times a day
- 21% connect with friends and family over VoIP (e.g. skype) several times a week
- 23% of respondents use instant messaging several times a day

connecting with friends

Category	Percentage
Once every 4-6 months	0%
Once every 2-3 months	1%
Less often	2%
Once a month	2%
Never	3%
At least once every two weeks	7%
Several times a week	18%
Daily	24%
Several times a day	42%

communicating over VoIP

Category	Percentage
Once every 4-6 months	2%
Once every 2-3 months	3%
Once a month	7%
Less often	10%
Several times a day	12%
At least once every two weeks	13%
Daily	13%
Never	19%
Several times a week	21%

Using instant messaging

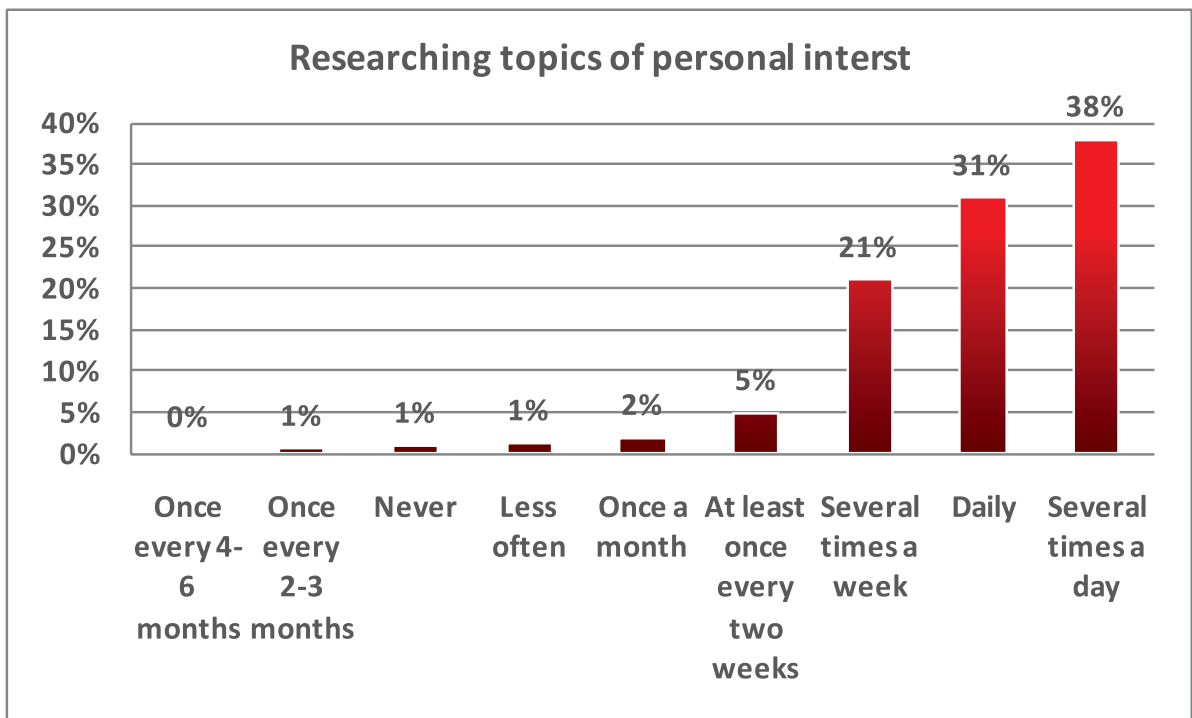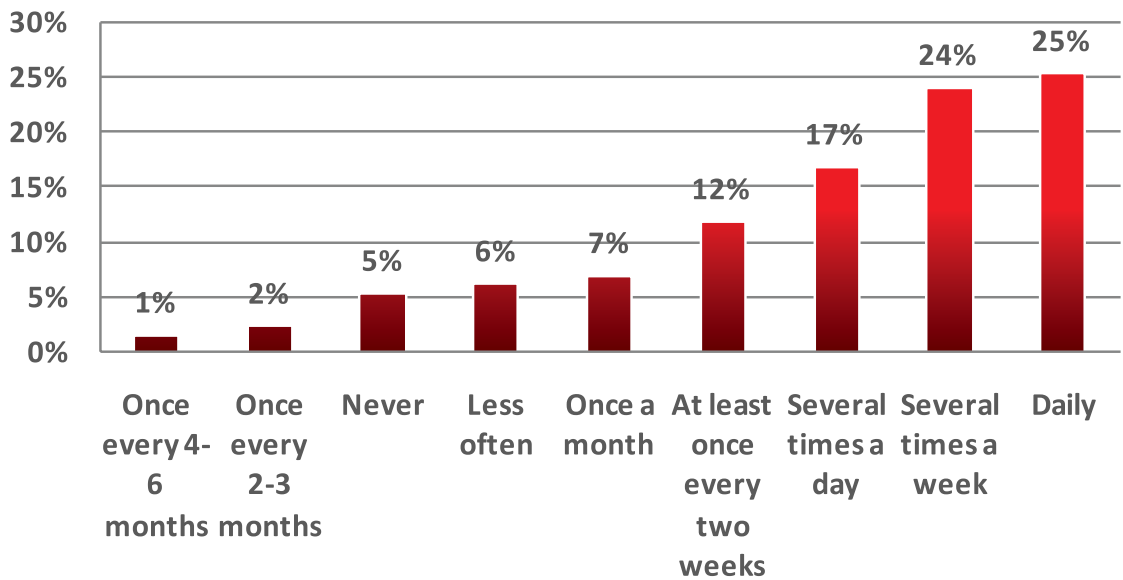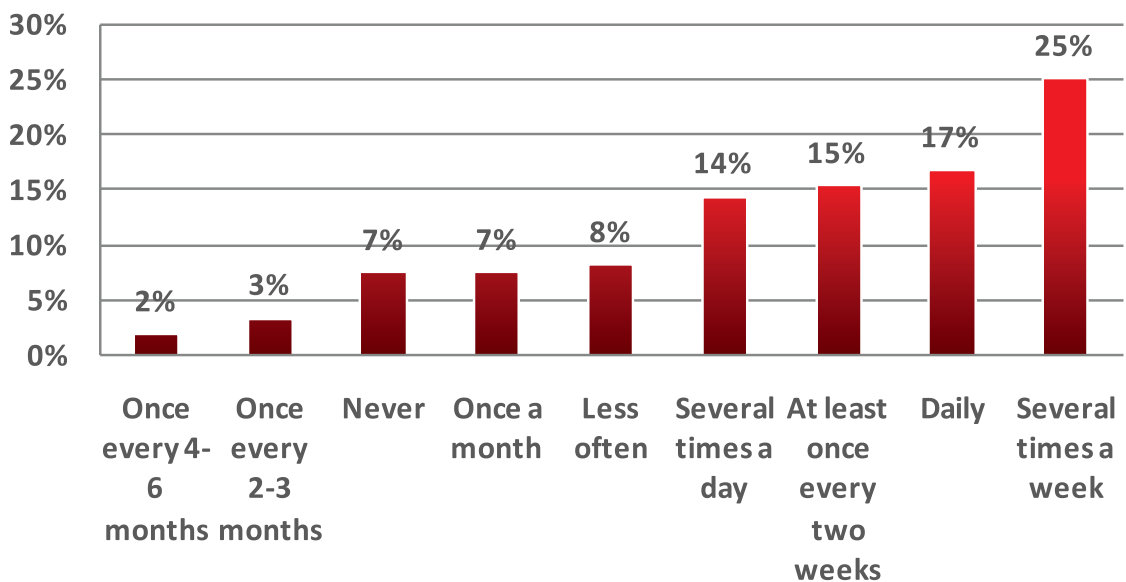| Category	Percentage
Once every 4-6 months	1%
Once every 2-3 months	3%
Once a month	5%
Less often	9%
At least once every two weeks	9%
Never	11%
Daily	18%
Several times a week	19%
Several times a day	24%
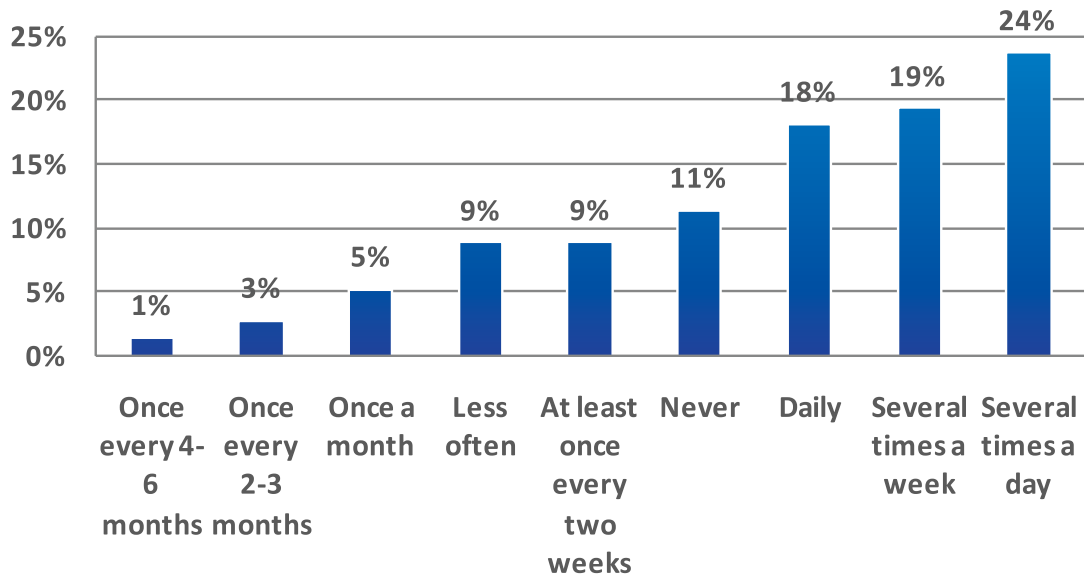
Time spent on online educational activities

- 69% of respondents research their interests at least once a day and only 1% have never done so
- 32% of respondents use language learning platforms at least once a day
- 41% of respondents read educational blogs at least once a day
- 31% of respondents watch instructional videos at least once a day
- 33% of respondents have never taken formal online courses offered by their institution
- 27% take formal online courses several times a week (of those 8% take them on a daily basis)
- 42% of respondents have never taken free online courses and 22% do so at least several times a week (with14% of those doing so at least once a day)

Researching topics of personal interst

Category	Value
Once every 4-6 months	0%
Once every 2-3 months	1%
Never	1%
Less often	1%
Once a month	2%
At least once every two weeks	5%
Several times a week	21%
Daily	31%
Several times a day	38%

Using language learning platforms

Category	Value
Once every 4-6 months	2%
Once every 2-3 months	3%
Once a month	7%
Less often	11%
Never	12%
At least once every two weeks	12%
Several times a day	15%
Daily	17%
Several times a week	21%

Reading online educational blogs and magazines

Category	Percentage
Once every 4-6 months	1%
Once every 2-3 months	2%
Never	5%
Less often	6%
Once a month	7%
At least once every two weeks	12%
Several times a day	17%
Several times a week	24%
Daily	25%

Watching instructional videos

Category	Percentage
Once every 4-6 months	2%
Once every 2-3 months	3%
Never	7%
Once a month	7%
Less often	8%
Several times a day	14%
At least once every two weeks	15%
Daily	17%
Several times a week	25%

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Taking online courses offered by my insitution

Category	Value
Once every 4-6 months	3%
Once every 2-3 months	5%
Several times a day	7%
Once a month	8%
Daily	8%
At least once every two weeks	9%
Several times a week	12%
Less often	15%
Never	33%
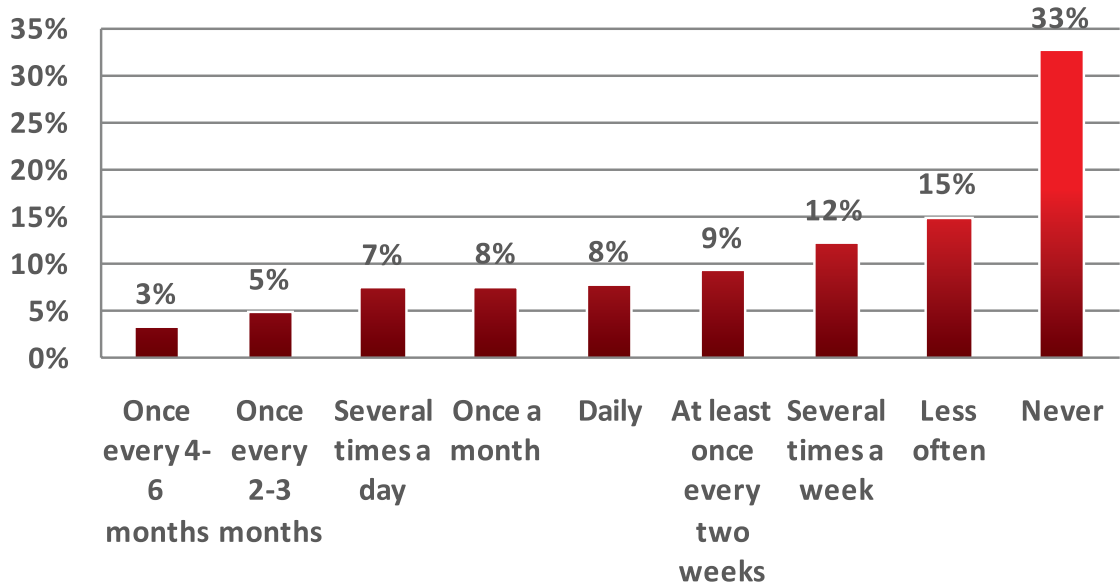
Taking free online courses

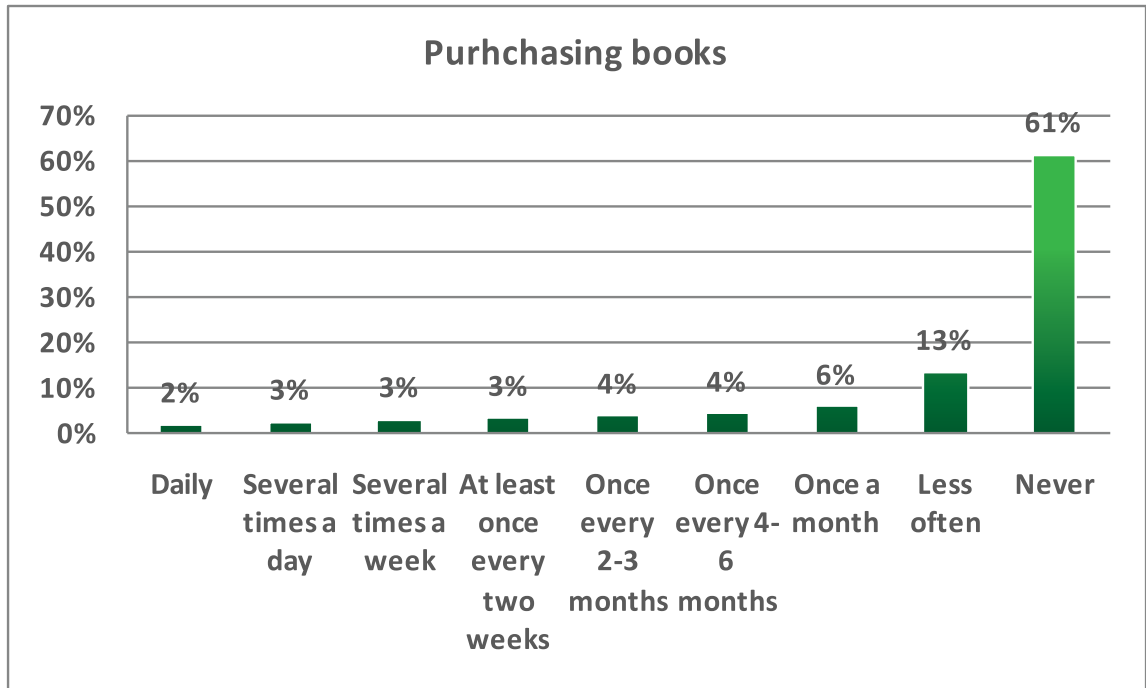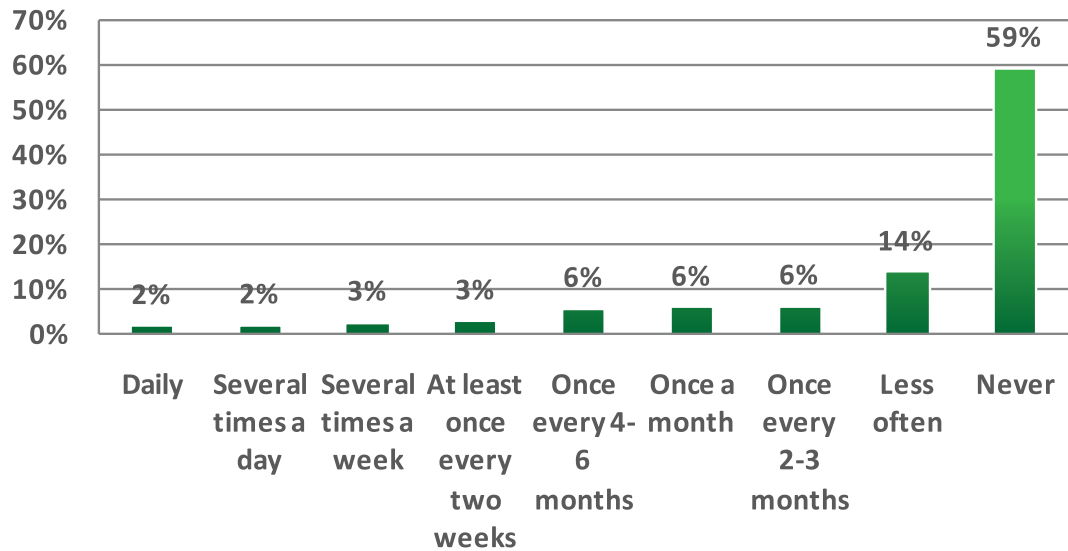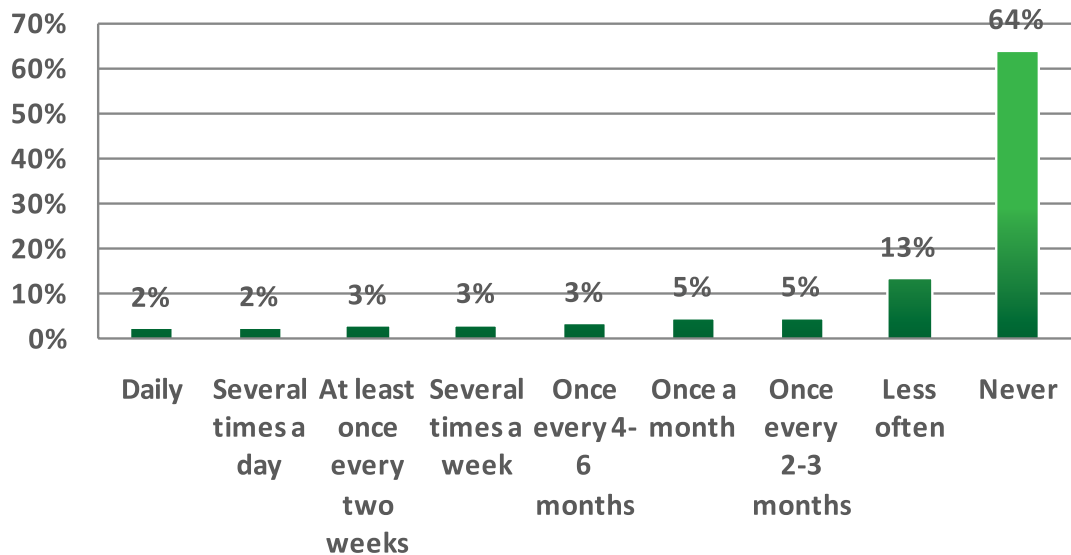| Category	Value
Once every 4-6 months	4%
Once every 2-3 months	5%
Daily	6%
At least once every two weeks	7%
Once a month	7%
Several times a day	7%
Several times a week	9%
Less often	14%
Never	41%
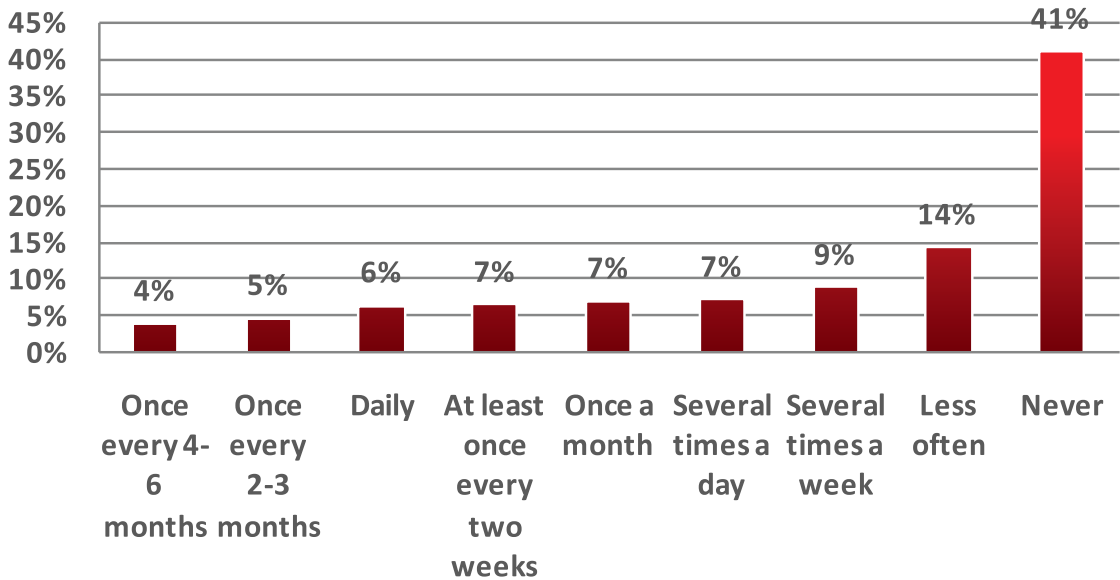
Time spent shopping online

- Responses to questions regarding online shopping indicate that the majority of respondents to this survey do not shop online.
- 61% of respondents have never purchased books online
- 56% of respondents have never purchased airline tickets online
- 59% of respondents don't purchase other items online

Purhchasing books

Daily	Several times a day	Several times a week	At least once every two weeks	Once every 2-3 months	Once every 4-6 months	Once a month	Less often	Never
2%	3%	3%	3%	4%	4%	6%	13%	61%

Purchasing airline tickets

Daily	Several times a week	At least once every two weeks	Several times a day	Once a month	Once every 2-3 months	Once every 4-6 months	Less often	Never
1%	2%	2%	2%	3%	5%	10%	18%	56%

Purchasing other items

70%								
60%								59%
50%								
40%								
30%								
20%							14%	
10%	2%	2%	3%	3%	6%	6%	6%	
0%	Daily	Several times a day	Several times a week	At least once every two weeks	Once every 4-6 months	Once a month	Once every 2-3 months	Less often	Never

Purchasing on daily deal websites

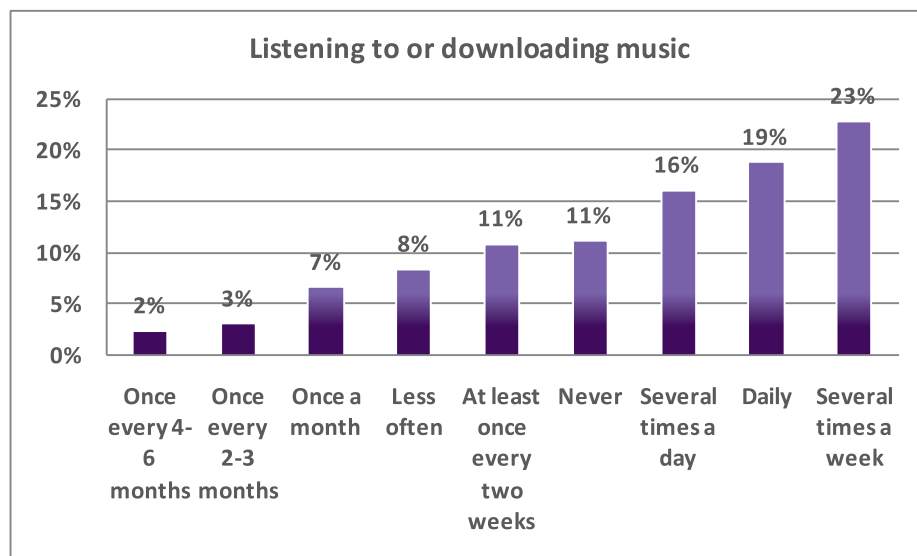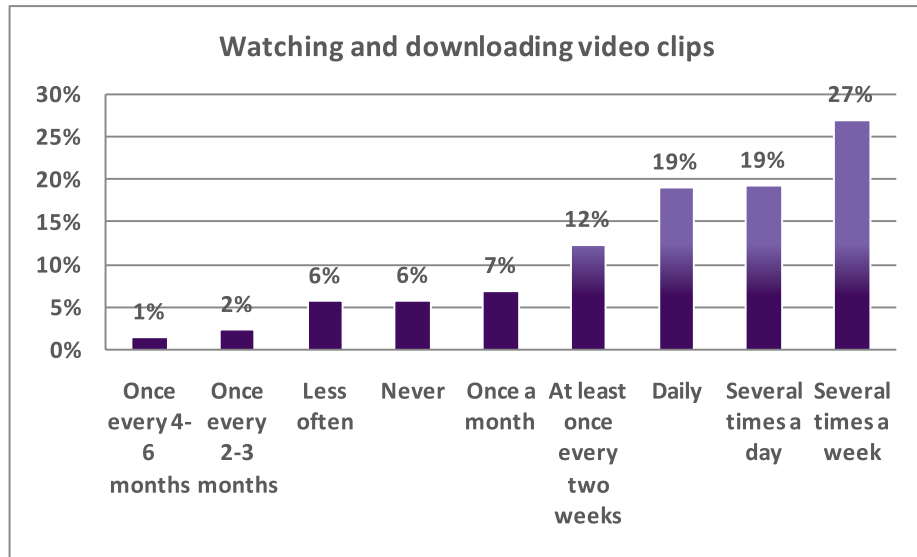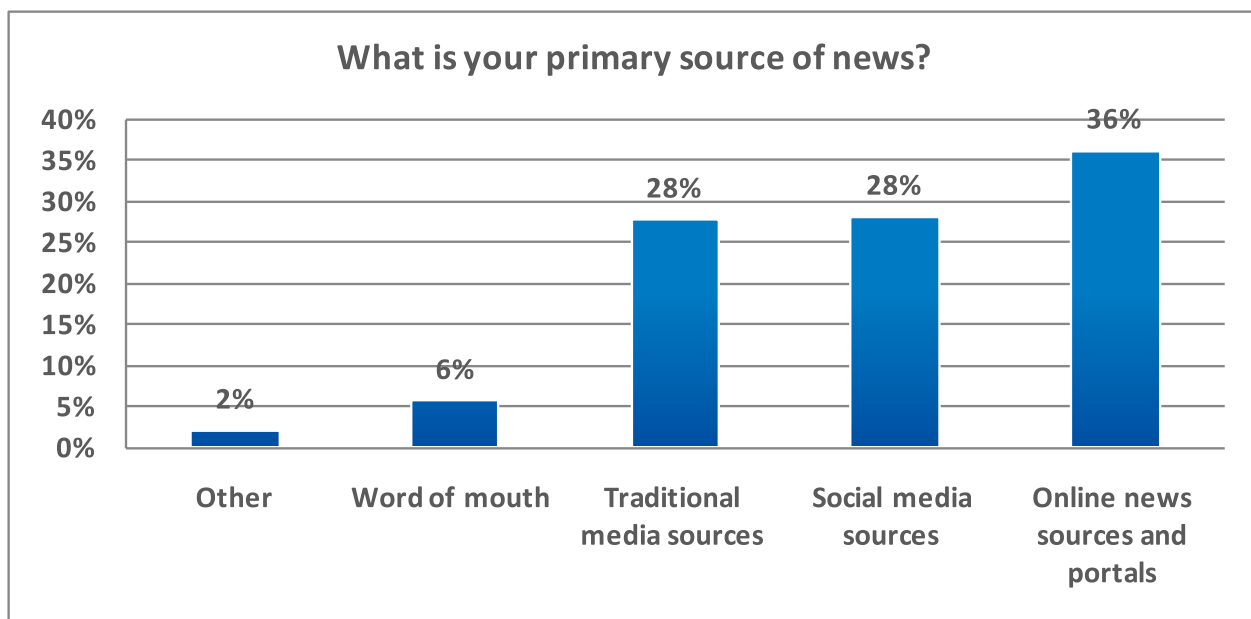|								
70%								
60%								64%
50%								
40%								
30%								
20%							13%	
10%	2%	2%	3%	3%	3%	5%	5%	
0%	Daily	Several times a day	At least once every two weeks	Several times a week	Once every 4-6 months	Once a month	Once every 2-3 months	Less often	Never

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Time spent on online entertainment

- 38% of respondents watch and download video clips at least once a day
- 35% or respondents download music at least once a day while 11% never listen to or download music online
- 30% of respondents have never played online games while 21% play online games at least once a day

Watching and downloading video clips

Category	Value
Once every 4-6 months	1%
Once every 2-3 months	2%
Less often	6%
Never	6%
Once a month	7%
At least once every two weeks	12%
Daily	19%
Several times a day	19%
Several times a week	27%

Listening to or downloading music

Category	Value
Once every 4-6 months	2%
Once every 2-3 months	3%
Once a month	7%
Less often	8%
At least once every two weeks	11%
Never	11%
Several times a day	16%
Daily	19%
Several times a week	23%

Playing online games

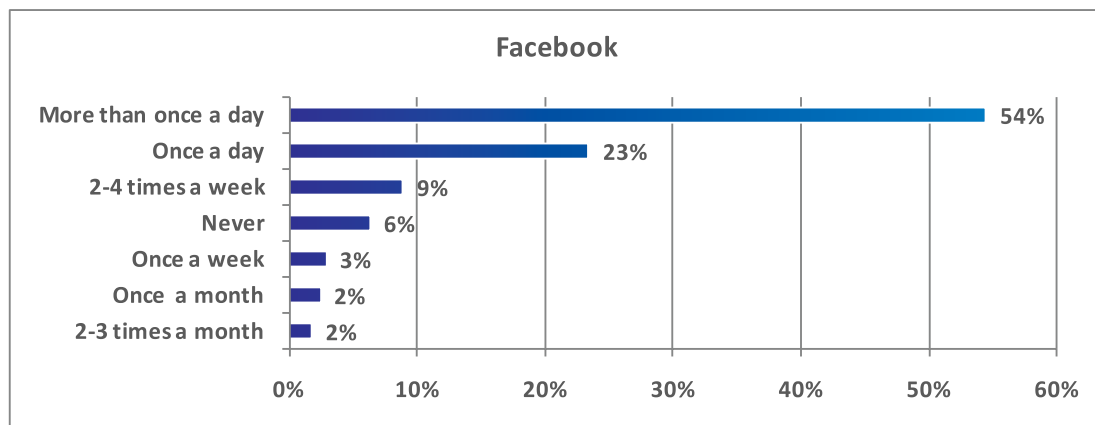| Category	Value
Once every 4-6 months	3%
Once every 2-3 months	3%
Once a month	7%
At least once every two weeks	9%
Several times a day	10%
Daily	11%
Several times a week	13%
Less often	14%
Never	30%

The internet as a source of current events

- The internet is the primary source of news for 36% of respondents
- 29% get their news from social media while another 28% get it from traditional media sources
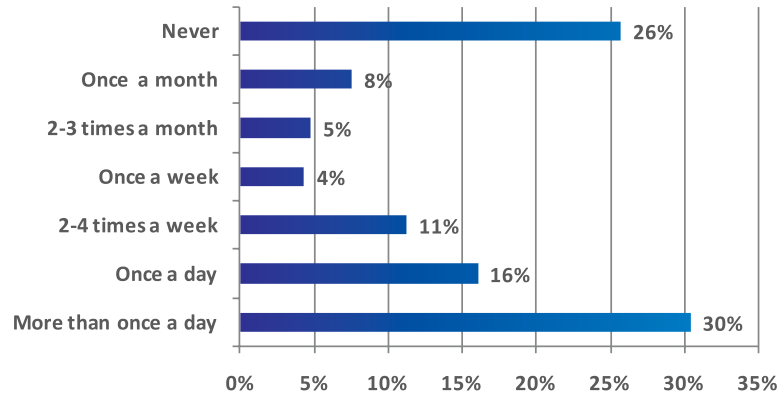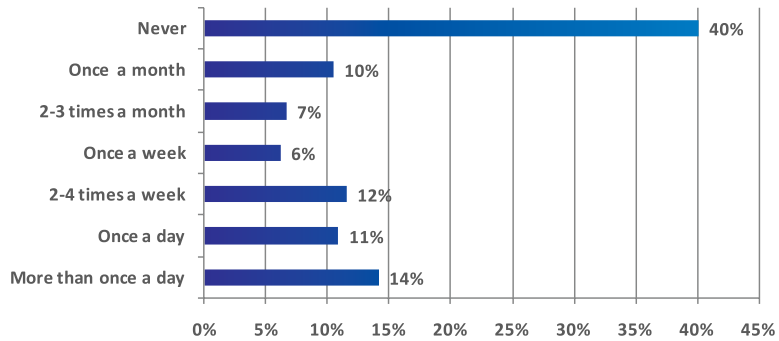
What is your primary source of news?

Source	Percentage
Other	2%
Word of mouth	6%
Traditional media sources	28%
Social media sources	28%
Online news sources and portals	36%

Frequency of social media usage

- Facebook is the most popular social network, followed by Google+ and then twitter. Most respondents have never used the other social networks listed.
- 54% of respondents to this survey indicated using Facebook more than once a day, while 30% used Google+ at the same frequency. Only 14% of respondents used twitter more than once a day.
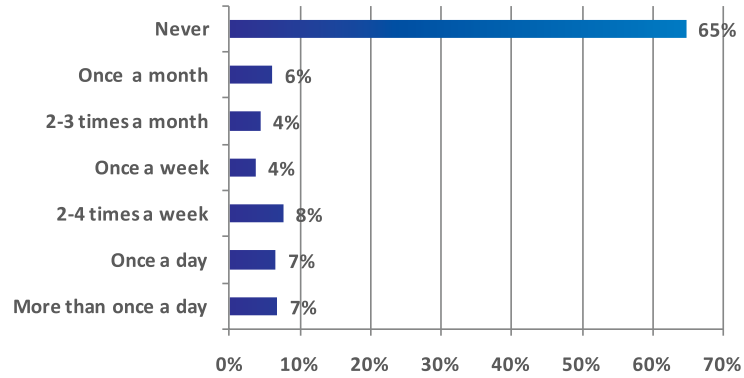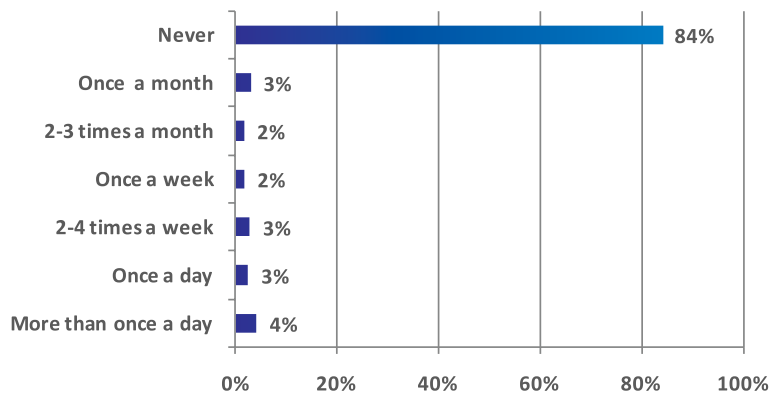
Facebook

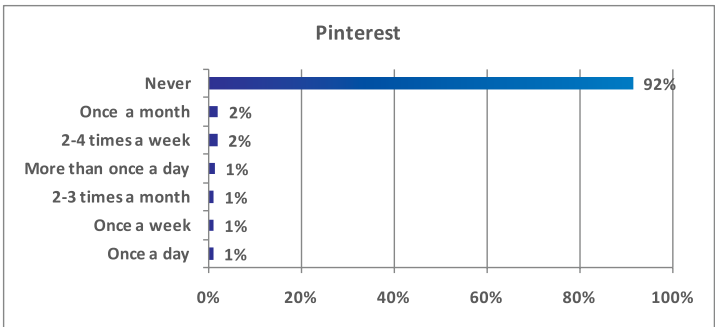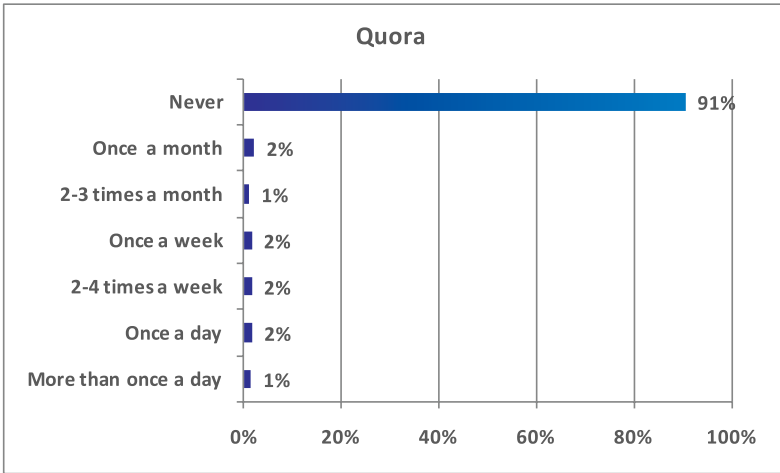
Frequency	Percentage
More than once a day	54%
Once a day	23%
2-4 times a week	9%
Never	6%
Once a week	3%
Once a month	2%
2-3 times a month	2%

Google+

Frequency	Percentage
Never	26%
Once a month	8%
2-3 times a month	5%
Once a week	4%
2-4 times a week	11%
Once a day	16%
More than once a day	30%

Twitter

Frequency	Percentage
Never	40%
Once a month	10%
2-3 times a month	7%
Once a week	6%
2-4 times a week	12%
Once a day	11%
More than once a day	14%

LinkedIn

Frequency	Percentage
Never	65%
Once a month	6%
2-3 times a month	4%
Once a week	4%
2-4 times a week	8%
Once a day	7%
More than once a day	7%

InstaGram

Frequency	Percentage
Never	84%
Once a month	3%
2-3 times a month	2%
Once a week	2%
2-4 times a week	3%
Once a day	3%
More than once a day	4%

MySpace

Frequency	Percentage
Never	84%
Once a month	5%
2-3 times a month	2%
Once a week	2%
2-4 times a week	2%
Once a day	2%
More than once a day	2%

Flickr

Frequency	Percentage
Never	87%
Once a month	4%
2-4 times a week	2%
2-3 times a month	2%
Once a day	1%
More than once a day	1%
Once a week	1%

Quora

Frequency	Percentage
Never	91%
Once a month	2%
2-3 times a month	1%
Once a week	2%
2-4 times a week	2%
Once a day	2%
More than once a day	1%

Pinterest

Frequency	Percentage
Never	92%
Once a month	2%
2-4 times a week	2%
More than once a day	1%
2-3 times a month	1%
Once a week	1%
Once a day	1%

DeviantArt

Frequency	Percentage
Never	92%
Once a month	2%
2-3 times a month	1%
Once a week	1%
2-4 times a week	1%
Once a day	1%
More than once a day	1%

Foursquare

Frequency	Percentage
Never	92%
Once a month	2%
2-3 times a month	1%
Once a week	1%
2-4 times a week	2%
Once a day	1%
More than once a day	2%

Other social networks

Frequency	Percentage
Never	55%
Once a month	7%
2-3 times a month	4%
Once a week	4%
2-4 times a week	8%
Once a day	10%
More than once a day	13%

Attitudes Towards the Internet and Social Media
Social interaction

Social media has enabled better social activity for me

Category	Percentage
Strongly Disagree	1%
Disagree	3%
Neutral	11%
Agree	41%
Strongly Agree	44%
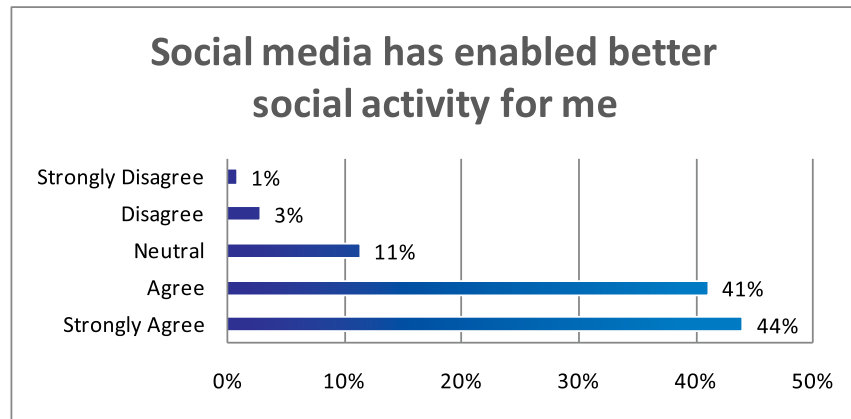
- Most respondents agree that social media has enabled their social activity

Online communication replaced traditional communication

Category	Percentage
Agree	45%
Strongly Agree	26%
Neutral	20%
Disagree	7%
Strongly Disagree	1%
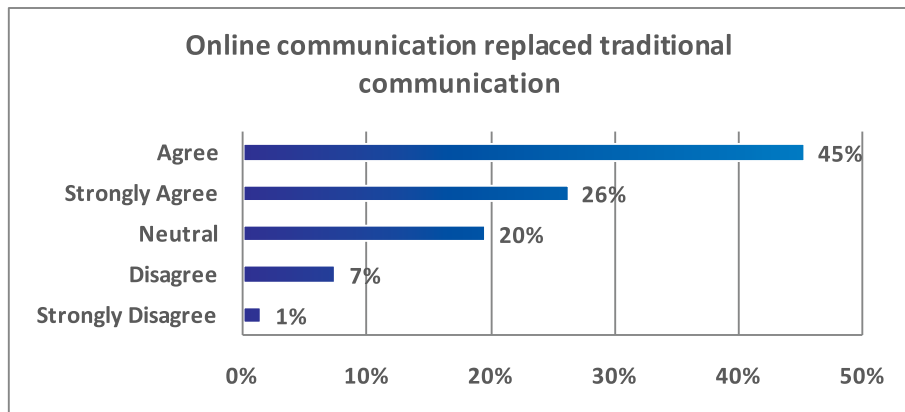
- 71% of respondents agree that online communication has replaced traditional communication

Most social activity is now virtual

Category	Percentage
Strongly Agree	19%
Agree	37%
Neutral	28%
Disagree	13%
Strongly Disagree	3%
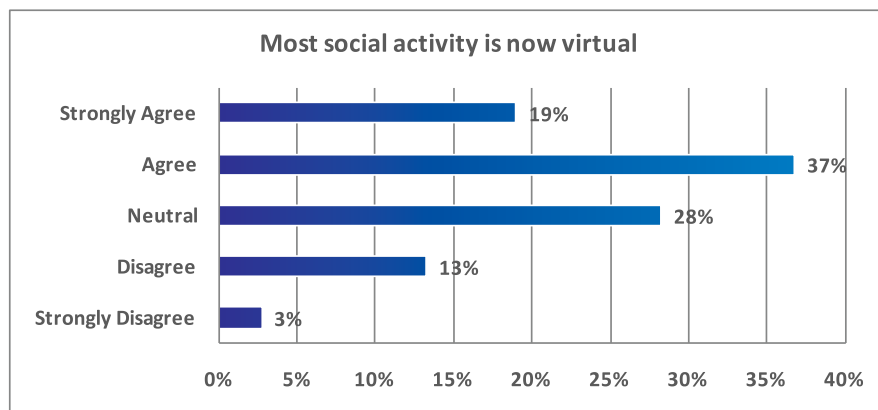
- 56% of respondents believe that most social activity is now virtual

Government interaction

- Most respondents agree that the internet has made their interaction with government easier
- 51% of respondents use online e-services to access information on offline services
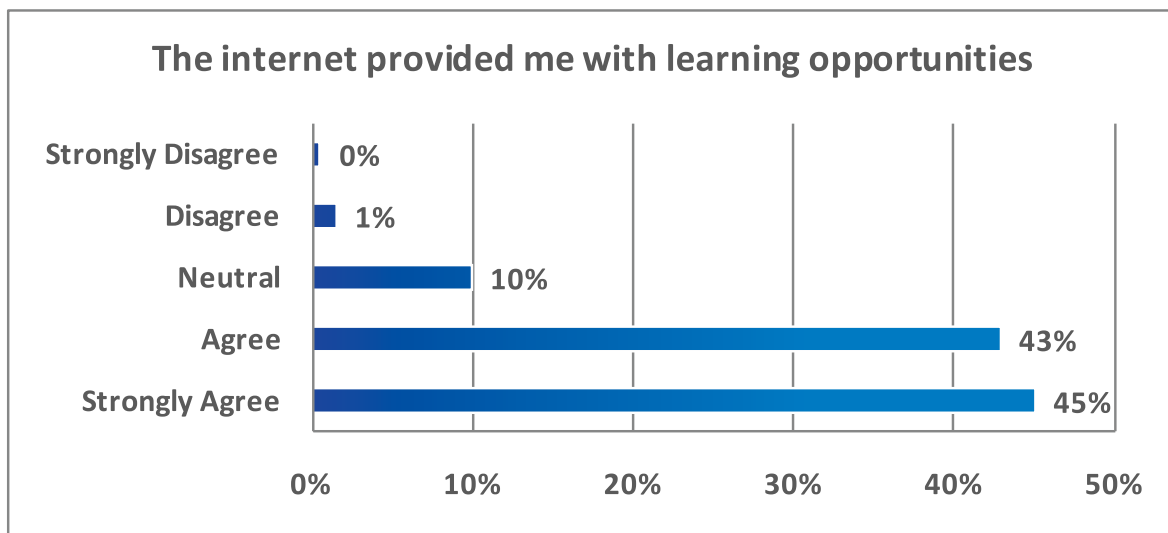- 29% use interactive government services while another 29 % never used e-services

The internet facilitated effective interaction with government

Category	Value
Strongly Disagree	5%
Disagree	12%
Neutral	31%
Agree	29%
Strongly Agree	23%

How do you use e-government services?

Category	Value
I only use government websites or portals to access information on offline government services	51%
I use interactive government services	29%
I never use e-government services	29%
I use basic one-way online services	28%
I make payments online to the government	20%
Other	1%

Privacy risks

- 35% of respondents believe that the internet poses a threat to their privacy

The internet poses a threat to my privay

Category	Value
Disagree	27%
Neutral	34%
Agree	25%
Strongly Agree	10%

Learning opportunities

The internet provided me with learning opportunities

Strongly Disagree	0%
Disagree	1%
Neutral	10%
Agree	43%
Strongly Agree	45%
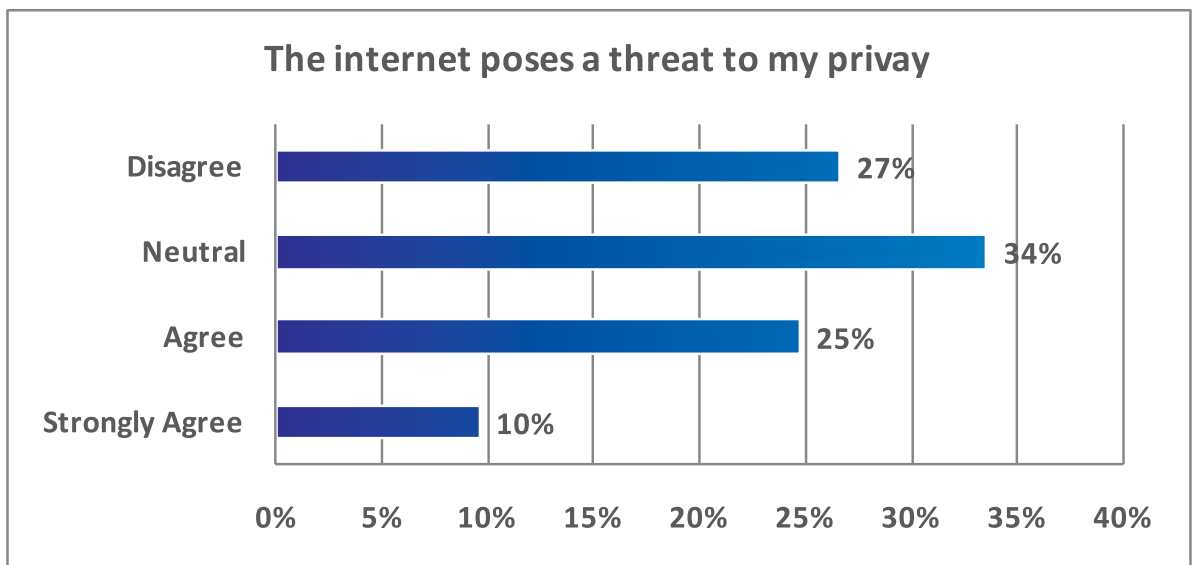
- 88% of respondents agree that the internet has provided them with learning opportunities. Only 1% disagree.
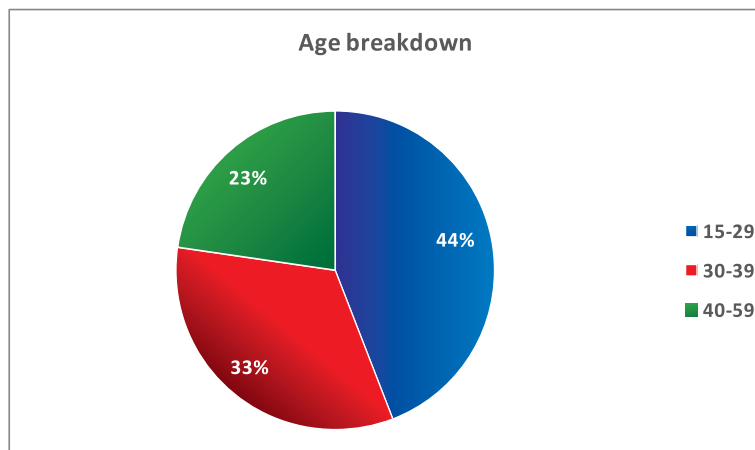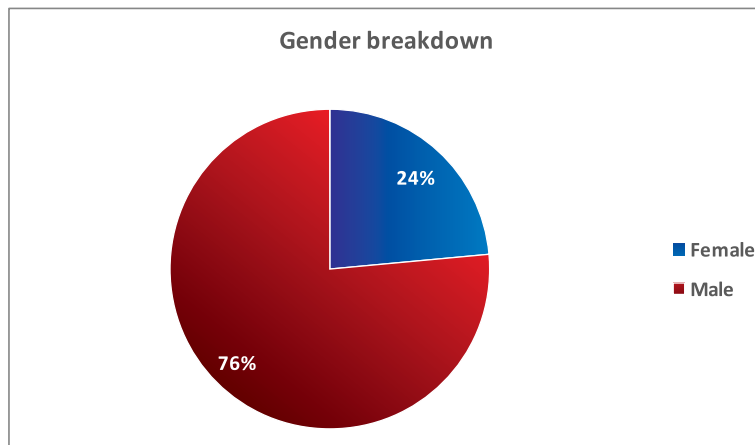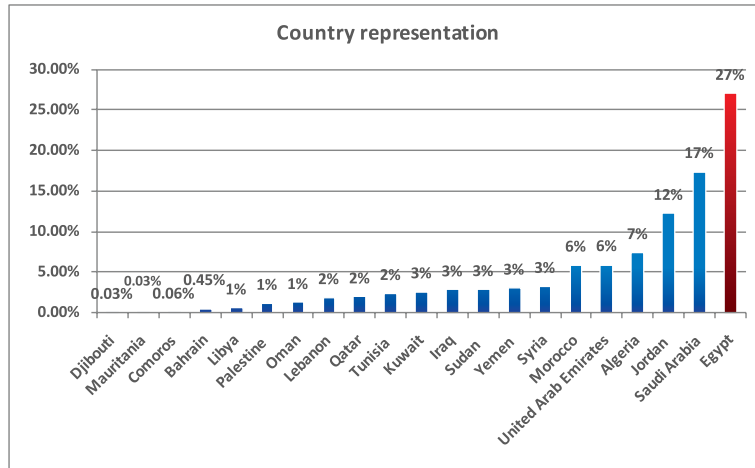
Survey sample and approach

The results reported in this white paper are based on a regional survey administered by the Governance and Innovation Program in collaboration with Bayt.com, targeting residents of 22 Arab countries. The survey fielding was conducted in March 2013 with respondents numbered at 3373. 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, Yemen). The sample consisted primarily of internet users as it was administered via an online survey. 76% of the sample was male and 48% of the sample was between the age of 15-29. 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 50.4% with 6694 people having started the survey at the time of cut off.

The chart describing "devices used to access the internet" reflects the responses to each option as a percentage of the total responses. This indicates the frequency of each device relative to the others and is not in absolute terms.

Demographics

Country representation

Country	%
Djibouti	0.03%
Mauritania	0.03%
Comoros	0.06%
Bahrain	0.45%
Libya	1%
Palestine	1%
Oman	1%
Lebanon	2%
Qatar	2%
Tunisia	2%
Kuwait	3%
Iraq	3%
Sudan	3%
Yemen	3%
Syria	3%
Morocco	6%
United Arab Emirates	6%
Algeria	7%
Jordan	12%
Saudi Arabia	17%
Egypt	27%

Gender breakdown

- Female: 24%
- Male: 76%

Age breakdown

- 15-29: 44%
- 30-39: 33%
- 40-59: 23%

Marital status

- Single: 46%
- Married: 50%
- Divorced: 2%
- Separated: 1%
- Widowed: 0%
- Other: 1%

About the Authors

The White Paper is produced by Dubai School of Government's Governance and Innovation Program, and co-authored by **Sara Alshaer and Fadi Salem:**

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The views expressed in this report are those of the author and do not necessarily reflect those of the trustees, officers and other staff of the Dubai School of Government.

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Acknowledgements

The Governance and Innovation Program

The Governance and Innovation Program at DSG 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 Dubai School of Government

كليــة دبــي للإدارة الحكوميــة
DUBAI SCHOOL OF GOVERNMENT

The Dubai School of Government (DSG) 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, in cooperation with the Harvard Kennedy School, DSG aims to promote good governance through enhancing the region's capacity for effective public policy.

Toward this goal, the Dubai School of Government also collaborates with regional and global institutions in 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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