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.


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.

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. Online businesses are driving economic growth globally, with the internet accounting for 20% of economic growth from 2006 to 2011. More recently, social media has enabled the creation of new economic opportunities globally and in the Arab region.

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

In Partnership with:
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. 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.

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 worldwide. 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.

**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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6. UN e-Government Survey 2012
• 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

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.
• 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.

• 43% of respondents accessed social media at work, while 17% of respondents said it was not permitted or blocked.
Spending Time Online

- 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
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 (with 14% of those doing so at least once a day)
Taking online courses offered by my institution

Taking free online courses
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

Purchasing books

- 61% never
- 13% less often
- 6% once a month
- 4% once every 4-6 months
- 4% once every 2-3 months
- 3% at least once every two weeks
- 3% several times a week
- 3% several times a day
- 2% daily

Purchasing airline tickets

- 56% never
- 18% less often
- 10% once every 4-6 months
- 5% once every 2-3 months
- 3% at least once every two weeks
- 2% several times a week
- 2% several times a day
- 2% daily
Time spent on online entertainment

- 38% of respondents watch and download video clips at least once a day
- 35% of 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
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

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.
Attitudes Towards the Internet and Social Media

Social interaction

- Most respondents agree that social media has enabled their social activity

- 71% of respondents agree that online communication has replaced traditional communication

- 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]

- Strongly Disagree: 5%
- Disagree: 12%
- Neutral: 31%
- Agree: 23%
- Strongly Agree: 29%

How do you use e-government services?

- 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 privacy]

- Disagree: 27%
- Neutral: 34%
- Agree: 25%
- Strongly Agree: 10%
Learning opportunities

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.
About the Authors

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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

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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