

# Internet Usage in the Middle East

November 2009

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## Objective

- ✓ To gauge internet usage habits and attitudes in the Middle East region.

## Demographic Background & Methodology

### Age and Gender:

Adult males and females

Aged 16 plus years

### Country of Residence

GCC: UAE, KSA, Kuwait, Oman, Qatar, Bahrain

Levant: Lebanon, Syria, Jordan

North Africa: Egypt, Morocco, Algeria, Tunisia

Subcontinent: Pakistan

### Methodology:

Online data collection was done between 30th October and 22nd November 2009. The total number of respondents achieved was 13,847.

## Summary 1/2

- Most people access the internet from the home and a sizeable 41% also do it at work
- Usage of internet cafes is higher in Algeria (36%), Morocco and Syria (31% each)
- 16% seem to have at least two computers at home – one which they solely use and another which is shared with family members
- This number rises to 25% in Lebanon and 24% in Tunisia
- Most respondents (59%) tend to use the internet for work related purposes between one and four hours on average in a day while 25% use the net for more than four hours in a day
- The corresponding numbers are 55% and 14% for leisure purposes indicating leisure usage though lower than work related use, is still strong
- Nearly half the respondents feel they are knowledgeable about the internet
- There seems to be a higher level of claimed expertise in Lebanon and Bahrain
- 23% and 17% respectively have their own blog or website. Tunisia (33% and 24%), Algeria (33% and 23%) and Oman (30% and 24%) have a higher incidence of such consumers
- A range of activities are conducted through the net at differing frequencies
- Some of the behaviours that are more frequent are:
  - Email, checking news, job search, social networking, listening to and downloading music and researching/collecting information
- Online purchasing is not a very frequent activity

## Summary 2/2

- Most respondents (38%) visit between 6 and 10 sites in a day and another 26% visit less than 5 sites every day
- Most respondents felt that the internet had replaced their use of print media to some extent for news (business or political) and leisure information
- Egypt and Jordan seemed to be more active on this front
- There was an almost equal split among those who felt comfortable and wary about online payments with Kuwait, UAE, Qatar and Tunisia feeling more at ease
- Some respondents agree with some of the benefits of social networking sites – that they help connect with friends and family and are fun
- In terms of attitudes, most respondents feel virtual contact is sidelining real social activity but the benefit is that the internet has helped networking which may not have been physically possible
- Online communication is thought to be replacing traditional forms like telephone calls and more than half feel that it is difficult to find the required information given the abundance of data
- There was a strong positive inclination towards online education
- Internet is now the second strongest information provider for purchase decisions behind word of mouth with half of the consumers considering web based facts
- 44% use mobile phones for emailing with a higher incidence in Qatar, Bahrain, UAE and Syria

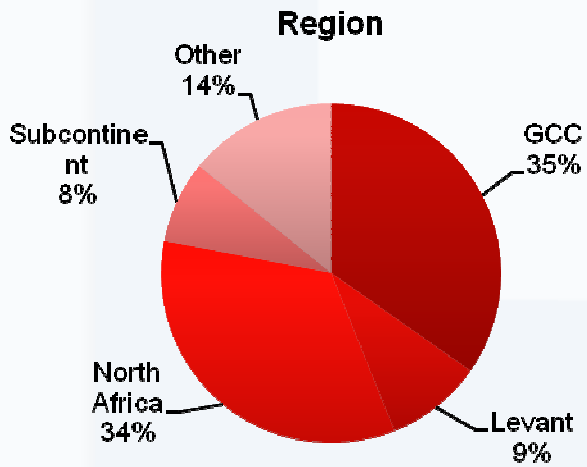
## Respondent Profile

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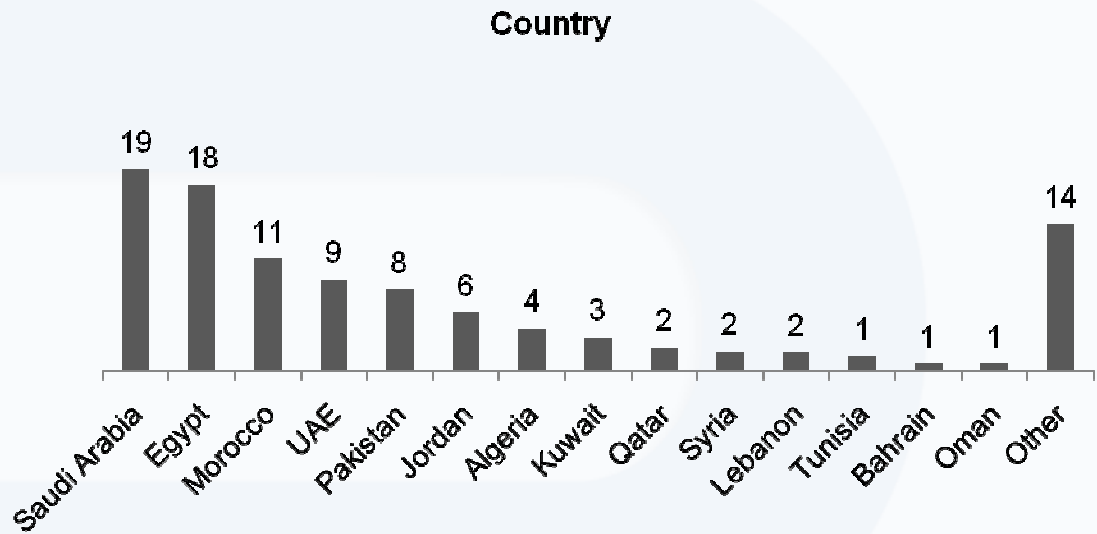
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## Respondent Profile – Personal



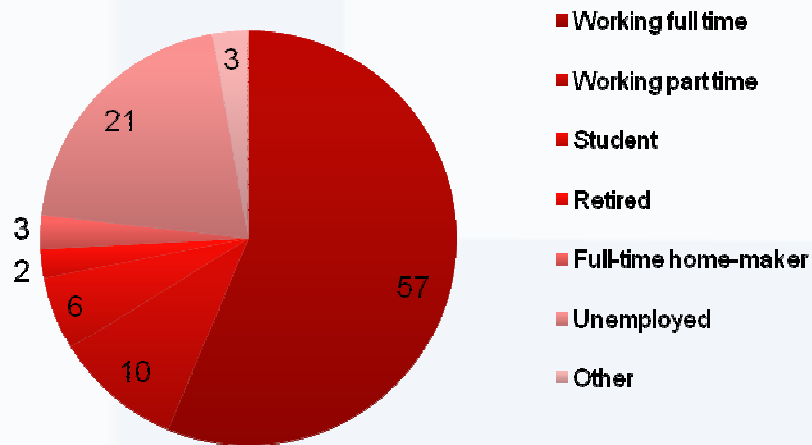
Base: Total Sample – N= 13,847



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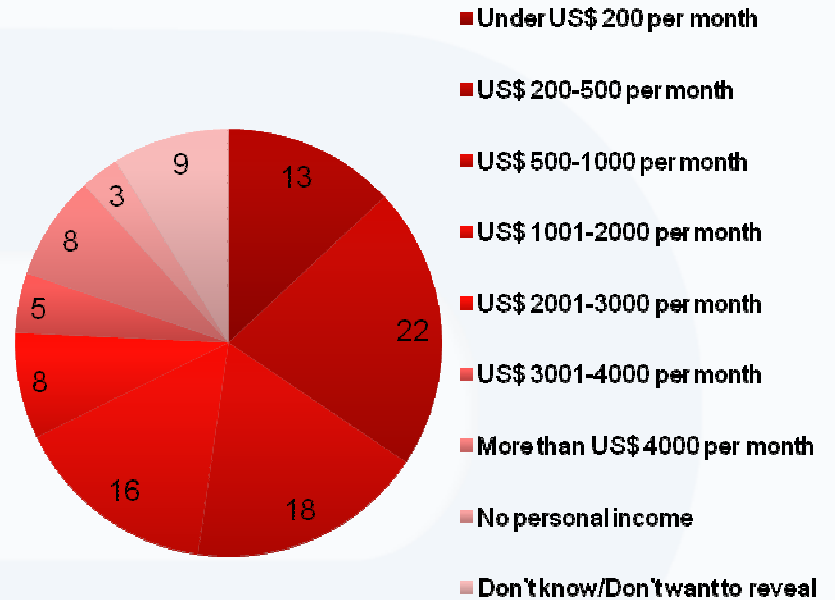
## Respondent Profile

### Working Status



Base: Total Sample – N= 13,847

### Personal Income



Base: Total Sample – N= 13,847



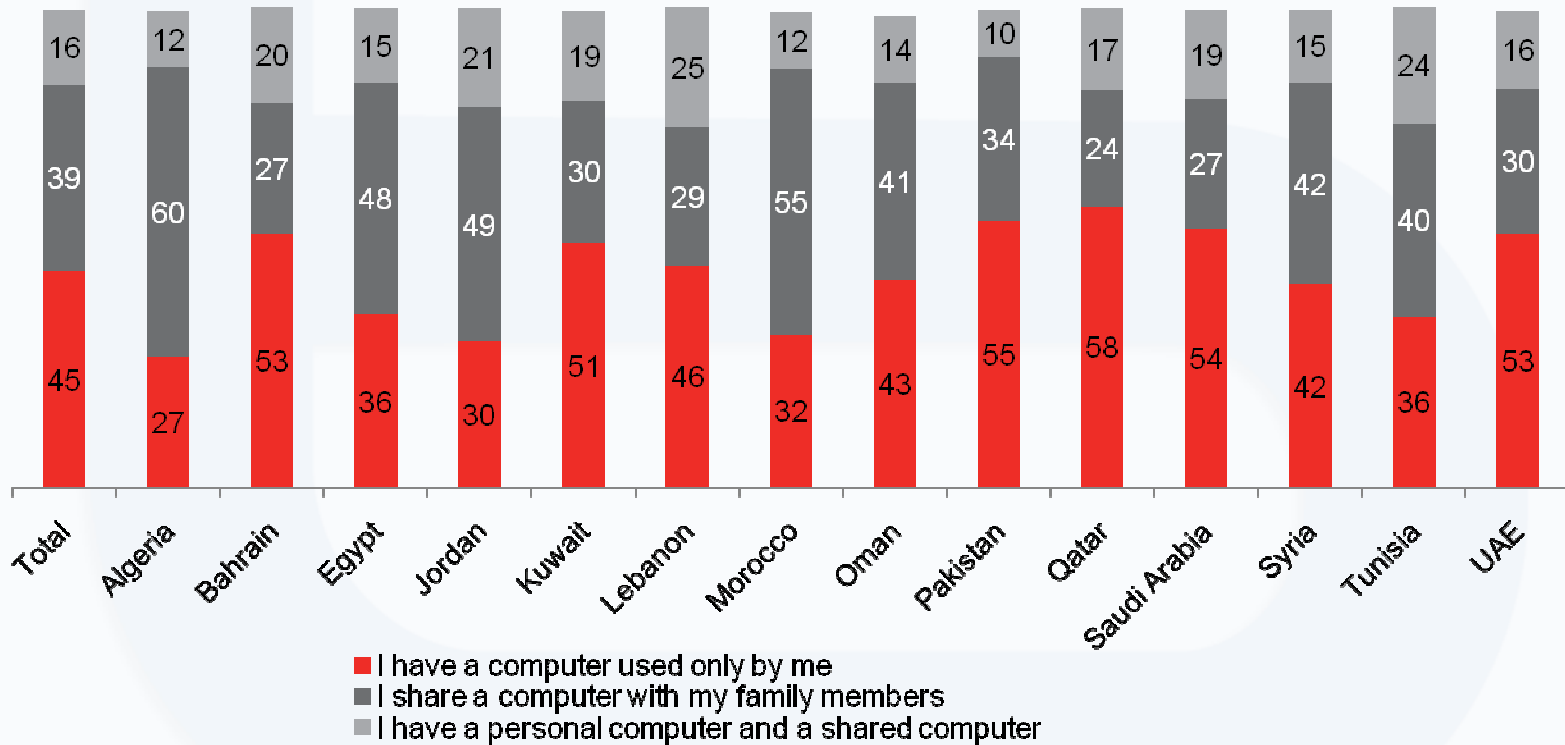
## Place of Accessing the Internet

From which of the following places do you access the internet? (Please select all that apply)

Base:	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Pakistan	Qatar	Saudi Arabia	Syria	Tunisia	UAE
<b>Achieved Sample size</b>	13,847	558	89	2,476	774	443	244	1,496	87	1,084	300	2,693	254	188	1,204
<b>Home</b>	81	63	79	88	80	83	89	73	59	75	87	86	80	79	85
<b>Work</b>	41	28	48	39	40	52	41	24	52	55	55	44	34	40	52
<b>Internet cafe</b>	18	36	21	13	13	16	17	31	29	10	11	16	31	22	14
<b>Mobile phone</b>	15	5	19	18	11	15	20	4	20	17	23	20	21	7	19
<b>University</b>	5	6	6	2	7	3	11	3	15	11	2	3	6	6	3
<b>Other</b>	4	3	4	4	2	4	3	4	7	4	5	4	2	5	4

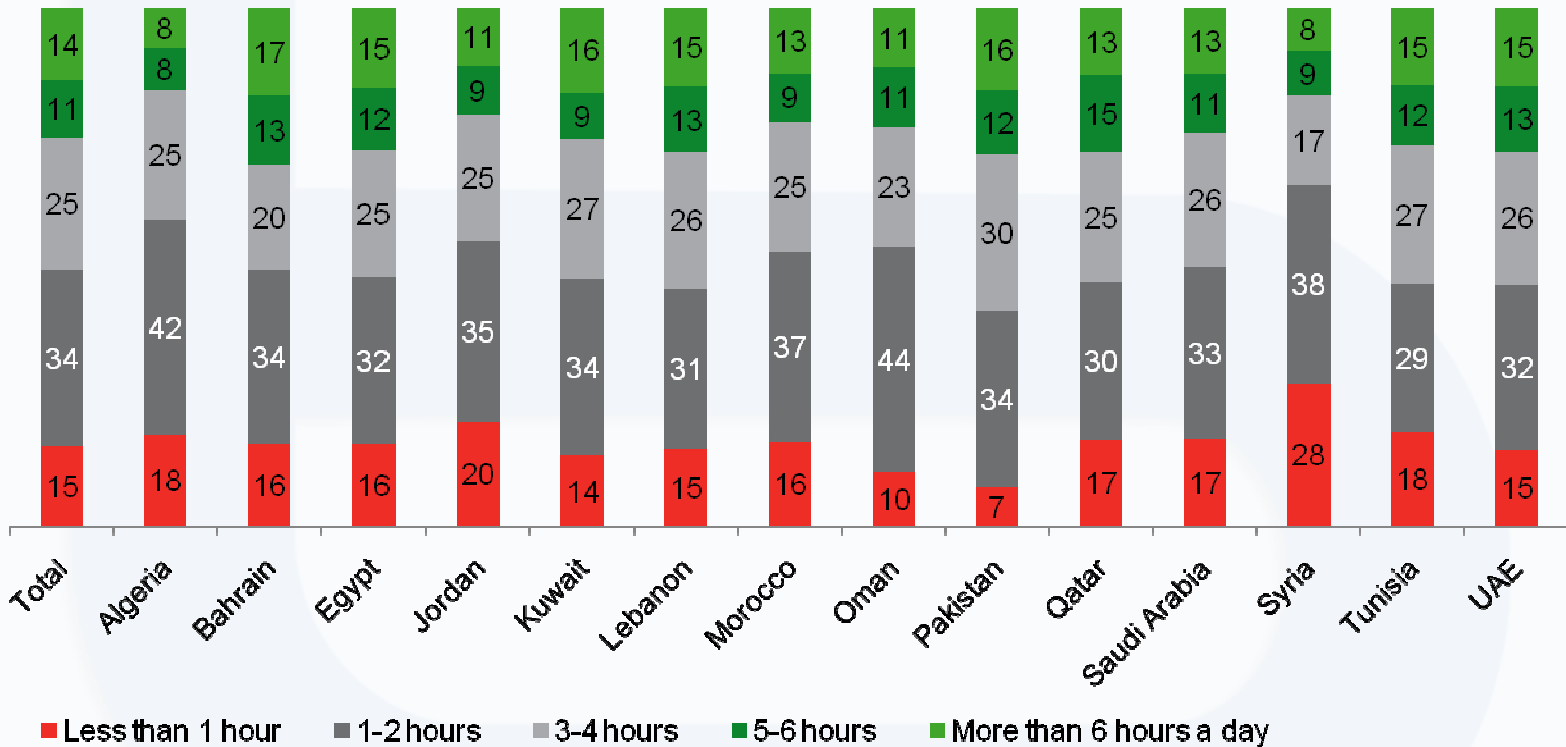
## Own or Shared Computer

Which of the following best describes the computer you have at home?



## Frequency of Using the Internet for Work

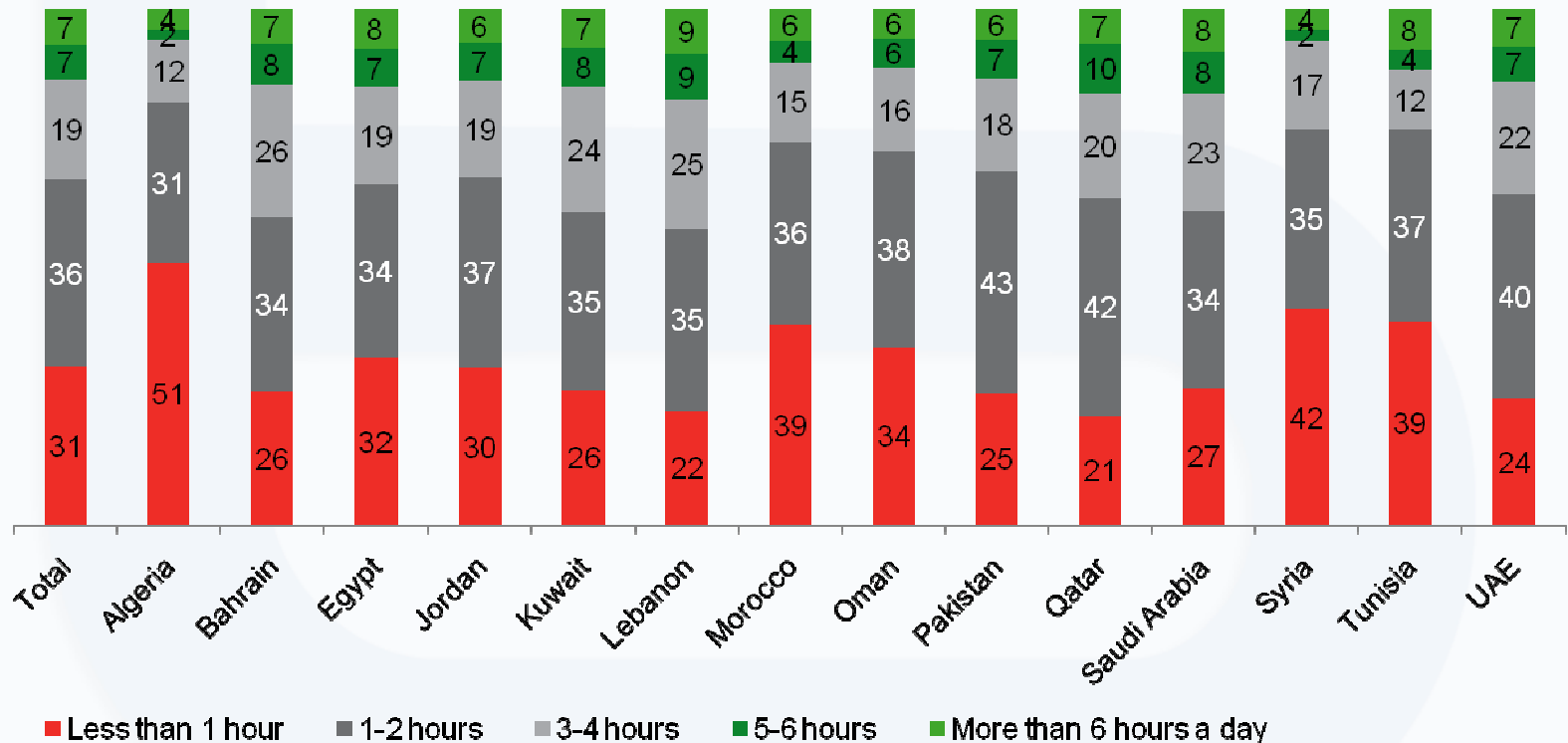
On an average how much time do you spend on the internet for work in a day?



## Frequency of Using the Internet for Leisure

On an average how much time do you spend on the internet for leisure in a day?

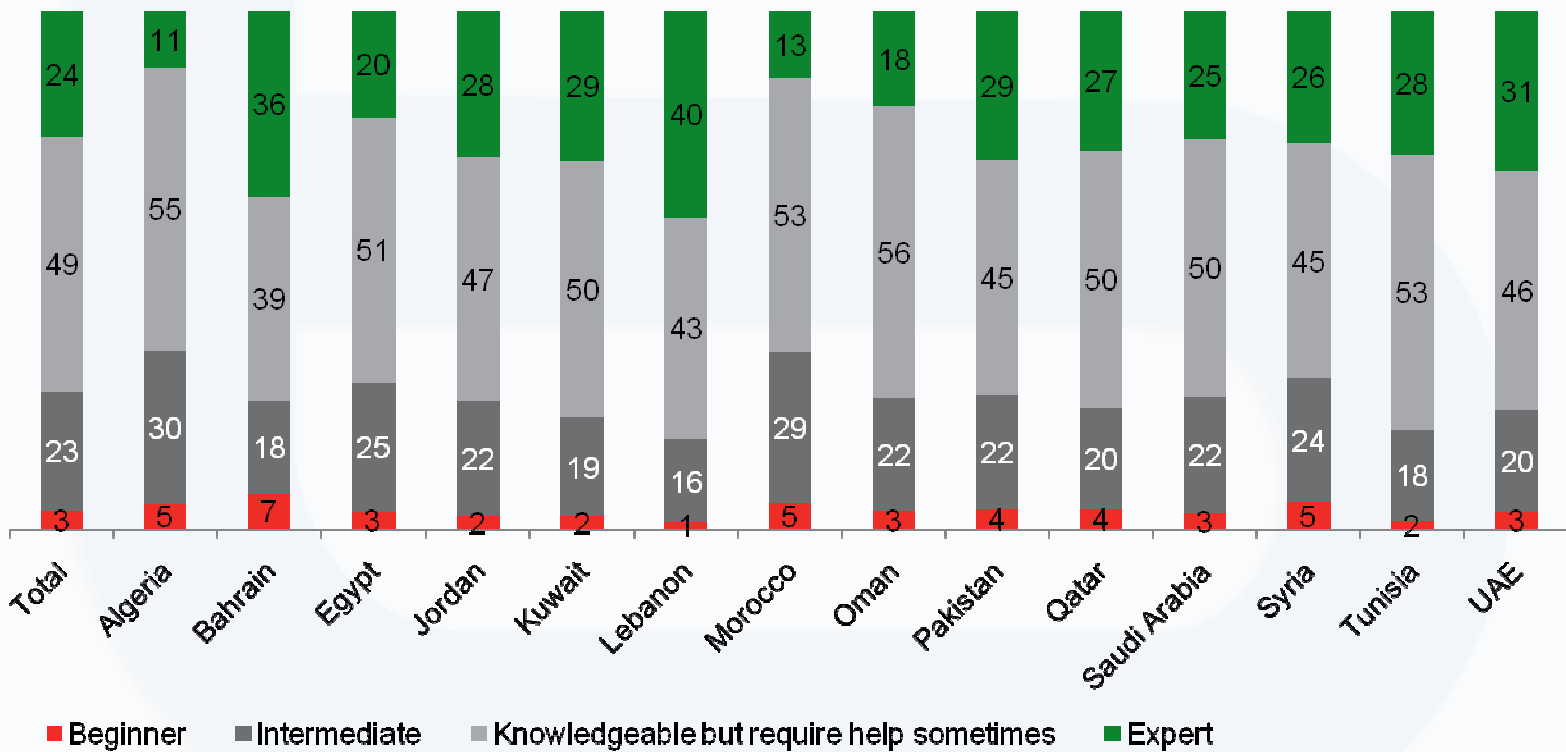
### Usage of internet for leisure is less frequent than for work



## Internet Savviness

How would you rate your Internet capabilities?

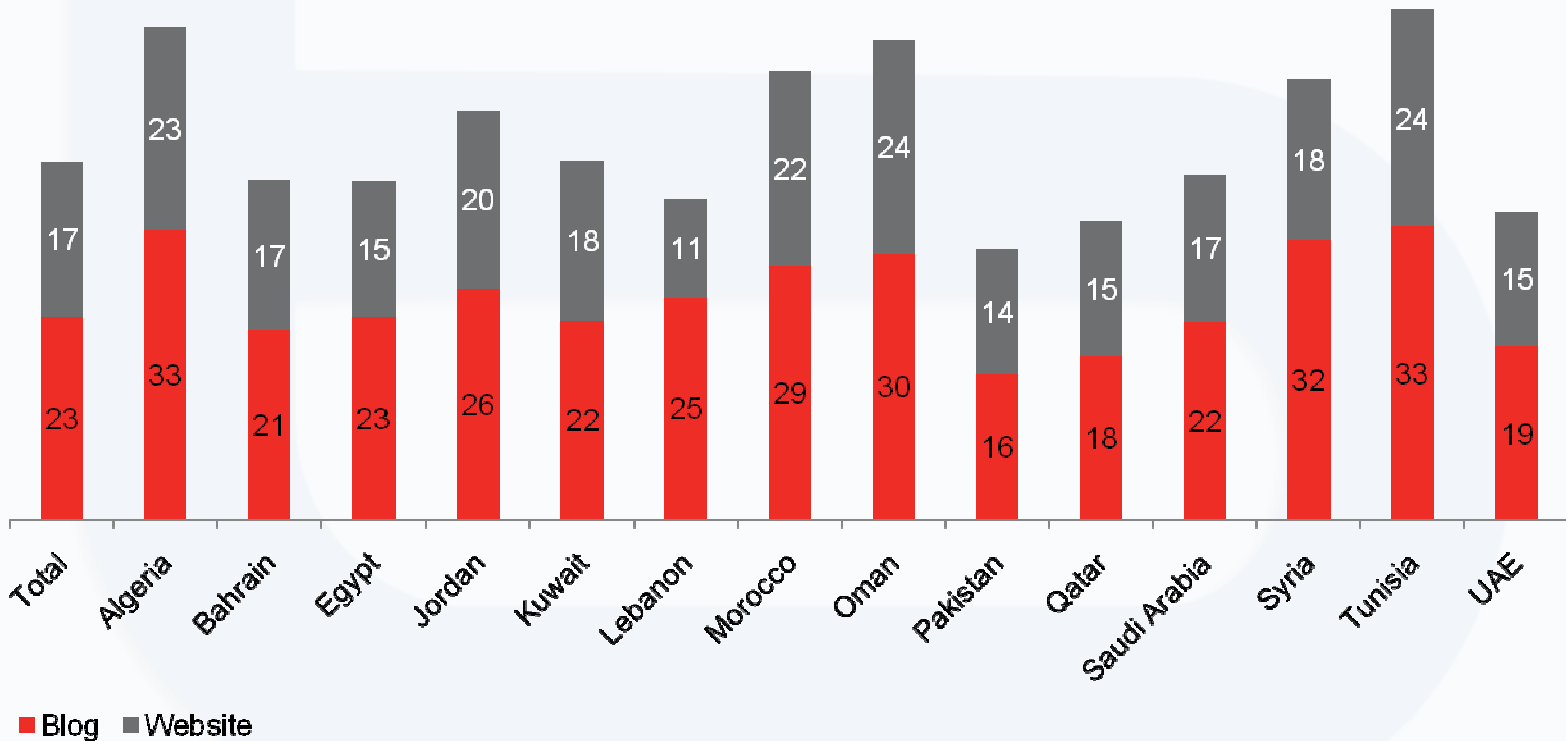
Most respondents are knowledgeable; more expertise in Lebanon and Bahrain



## Incidence of Blogs and Websites

Do you currently have your own website or blog?

Tunisia, Algeria and Oman have a good incidence of consumers with their own blogs and websites



## Internet based Activity 1/2

How frequently do you do the following activities using the internet? (Please select all that apply)

Note: Only frequency of at least once a month has been presented in this slide

Base:	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Pakistan	Qatar	Saudi Arabia	Syria	Tunisia	UAE
<b>Achieved Sample size</b>	<b>13,847</b>	<b>558</b>	<b>89</b>	<b>2,476</b>	<b>774</b>	<b>443</b>	<b>244</b>	<b>1,496</b>	<b>87</b>	<b>1,084</b>	<b>300</b>	<b>2,693</b>	<b>254</b>	<b>188</b>	<b>1,204</b>
Job search	77	72	78	80	82	76	77	74	72	79	72	70	76	87	78
Emailing friends	83	74	83	83	88	88	91	77	79	78	86	85	87	86	88
Social networking sites	57	48	63	55	60	60	74	50	54	56	67	55	50	65	66
Items to purchase	36	27	39	37	33	39	39	29	29	23	35	43	31	41	38
Planning holidays	20	12	26	17	15	20	22	15	23	18	20	24	10	19	23
Researching other matters	51	45	42	53	46	53	48	49	45	46	56	53	46	60	53
Purchasing books	15	16	12	15	10	13	15	11	20	12	14	15	17	17	14
Purchasing airline tickets	12	4	19	6	5	24	8	6	10	9	15	18	7	6	18
Purchasing movie tickets	7	4	10	5	5	14	9	5	10	8	8	5	4	8	11

## Internet based Activity 2/2

How frequently do you do the following activities using the internet? (Please select all that apply)

Note: Only frequency of at least once a month has been presented in this slide

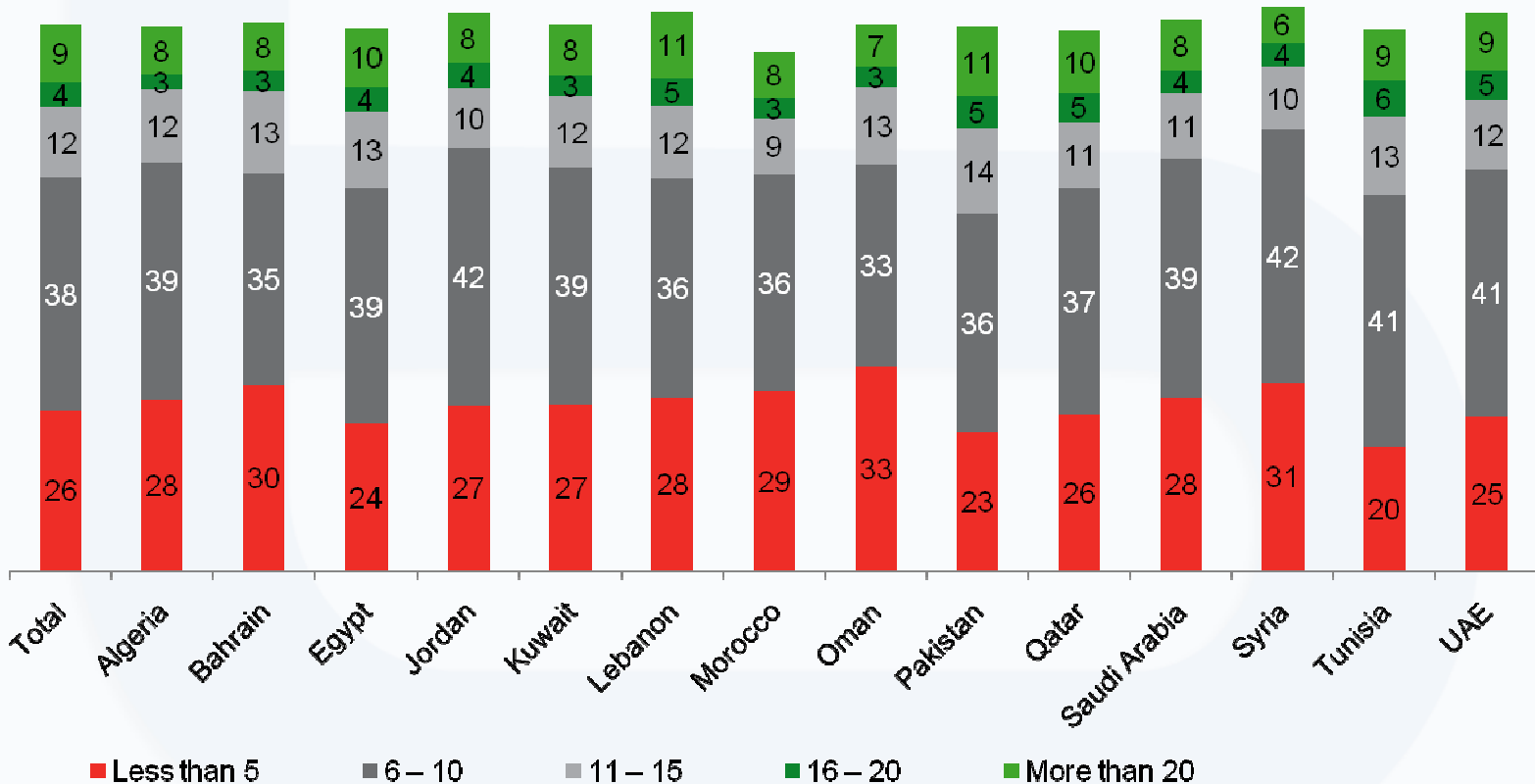
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Achieved Sample size	13,847	558	89	2,476	774	443	244	1,496	87	1,084	300	2,693	254	188	1,204
Purchasing on auction sites	8	6	11	5	6	8	9	6	8	9	9	9	6	10	10
Purchasing other items	12	8	12	11	7	13	11	10	14	12	13	13	7	14	15
Bloggng	20	20	26	22	22	18	19	20	18	16	17	21	28	22	16
Reading news	78	81	78	80	82	75	77	76	78	74	79	76	74	78	81
Online courses	25	29	27	27	25	21	22	31	21	25	24	20	26	30	20
Listening to music	57	45	62	58	63	53	63	68	49	52	60	53	37	55	59
Downloading music	51	36	57	58	56	51	55	51	40	50	50	49	36	47	53
Playing games	35	23	38	39	39	33	45	33	32	32	33	35	12	26	37
Downloading ringtones	21	15	26	25	19	20	18	19	28	24	18	21	16	13	20



## Number of Websites Visited

On an average how many websites do you visit in a single day?

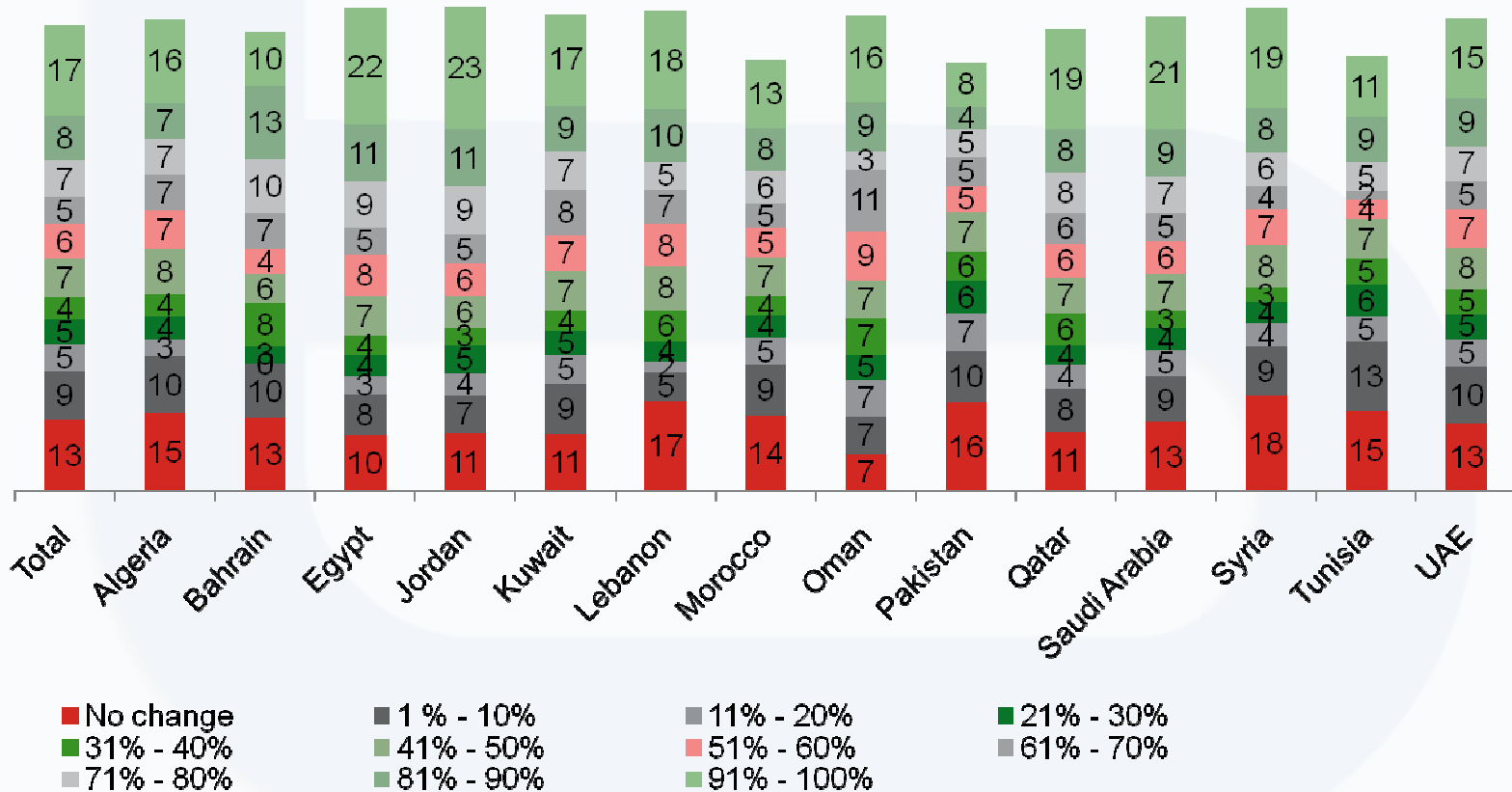
**Majority of users visit between 6 and 10 sites in a day**  
**Similar pattern across countries**



## The Internet as an Information Provider 1/3

Please indicate to what extent has the internet replaced print as your main source for each of the following:  
Political News coverage

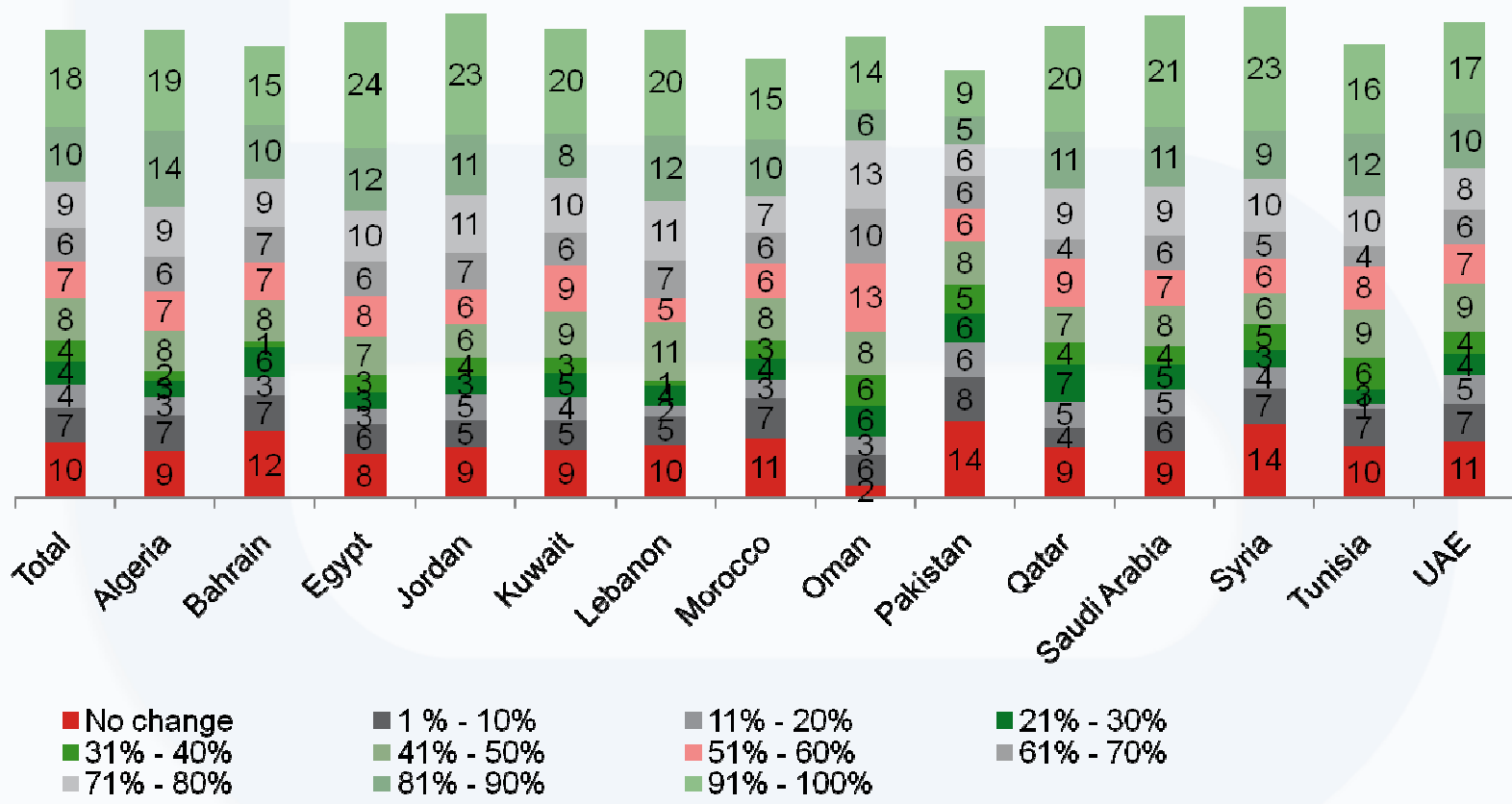
### Relatively greater usage of the internet as a political news provider in Egypt and Jordan



### The Internet as an Information Provider 2/3

Please indicate to what extent has the internet replaced print as your main source for each of the following:  
Business News coverage

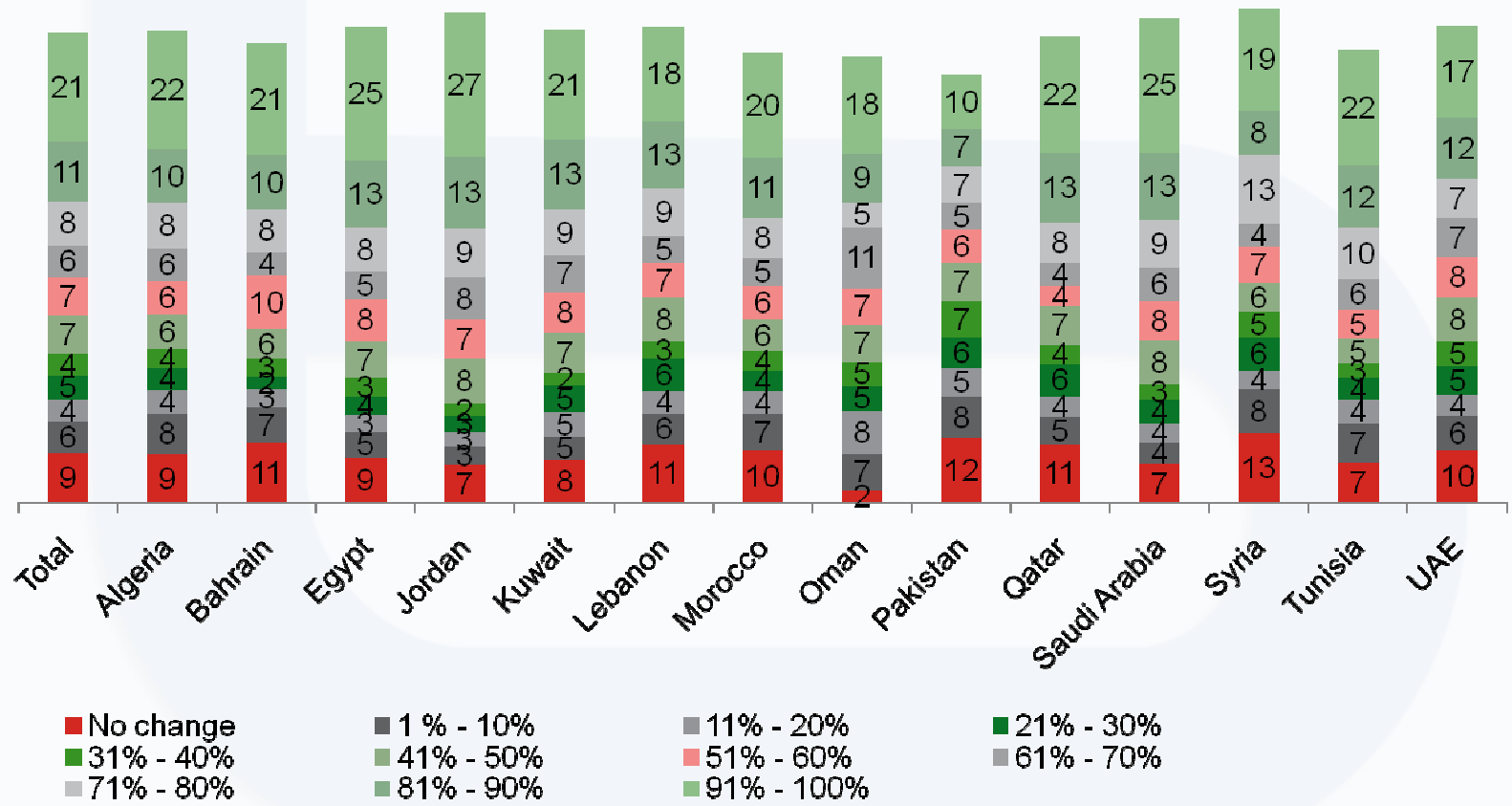
Again, Egypt and Jordan display greater usage. Other countries with heavy usage are Syria, Saudi Arabia, Lebanon and Algeria



### The Internet as an Information Provider 3/3

Please indicate to what extent has the internet replaced print as your main source for each of the following:  
Lifestyle/ leisure literature

**Users in Egypt, Jordan and Saudi Arabia seem to follow the internet for leisure updates more than those in other countries**

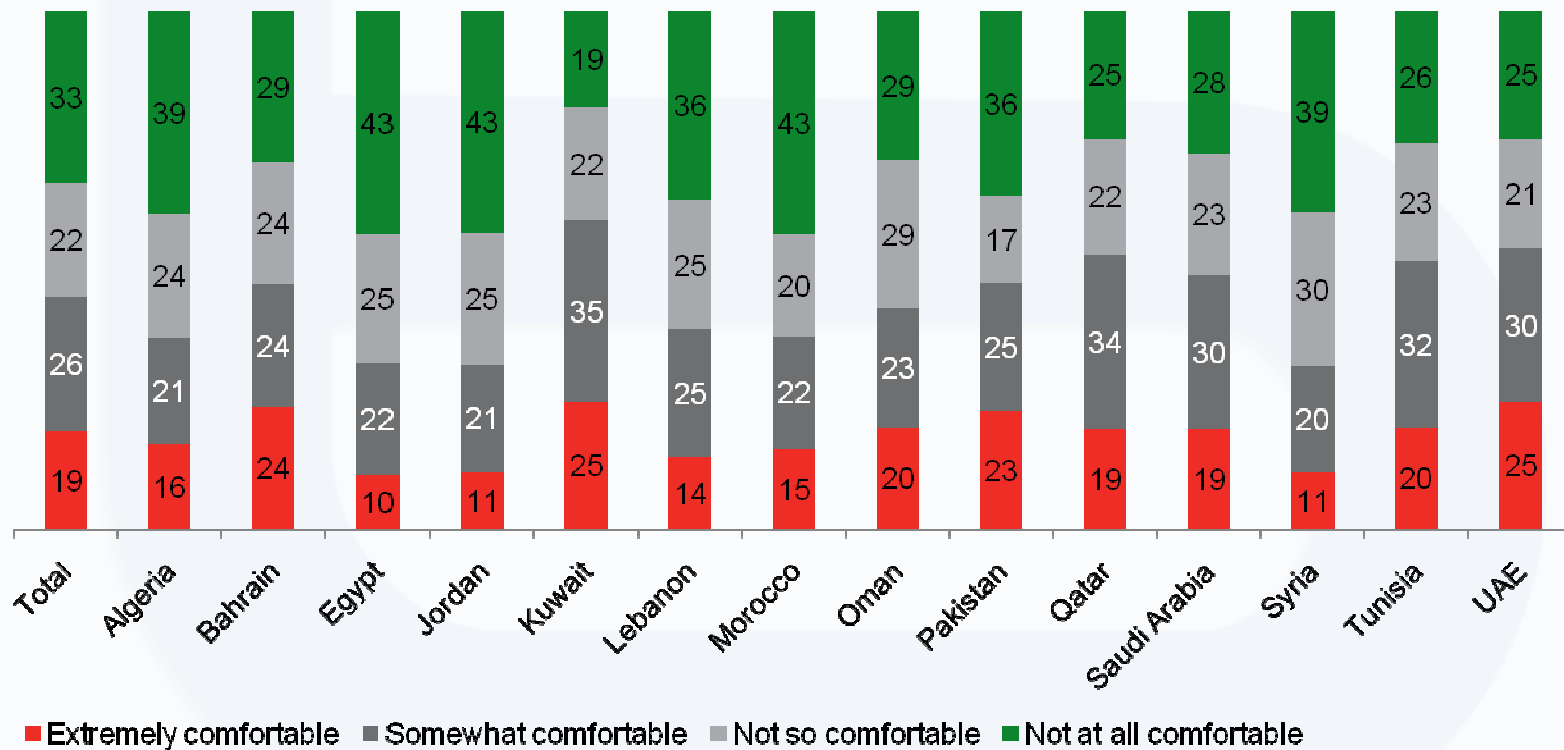


Base: Total Sample – N= 13,847

## Level of Comfort with Online Payments 1/2

What is your degree of comfort making online payments for : Personal matters

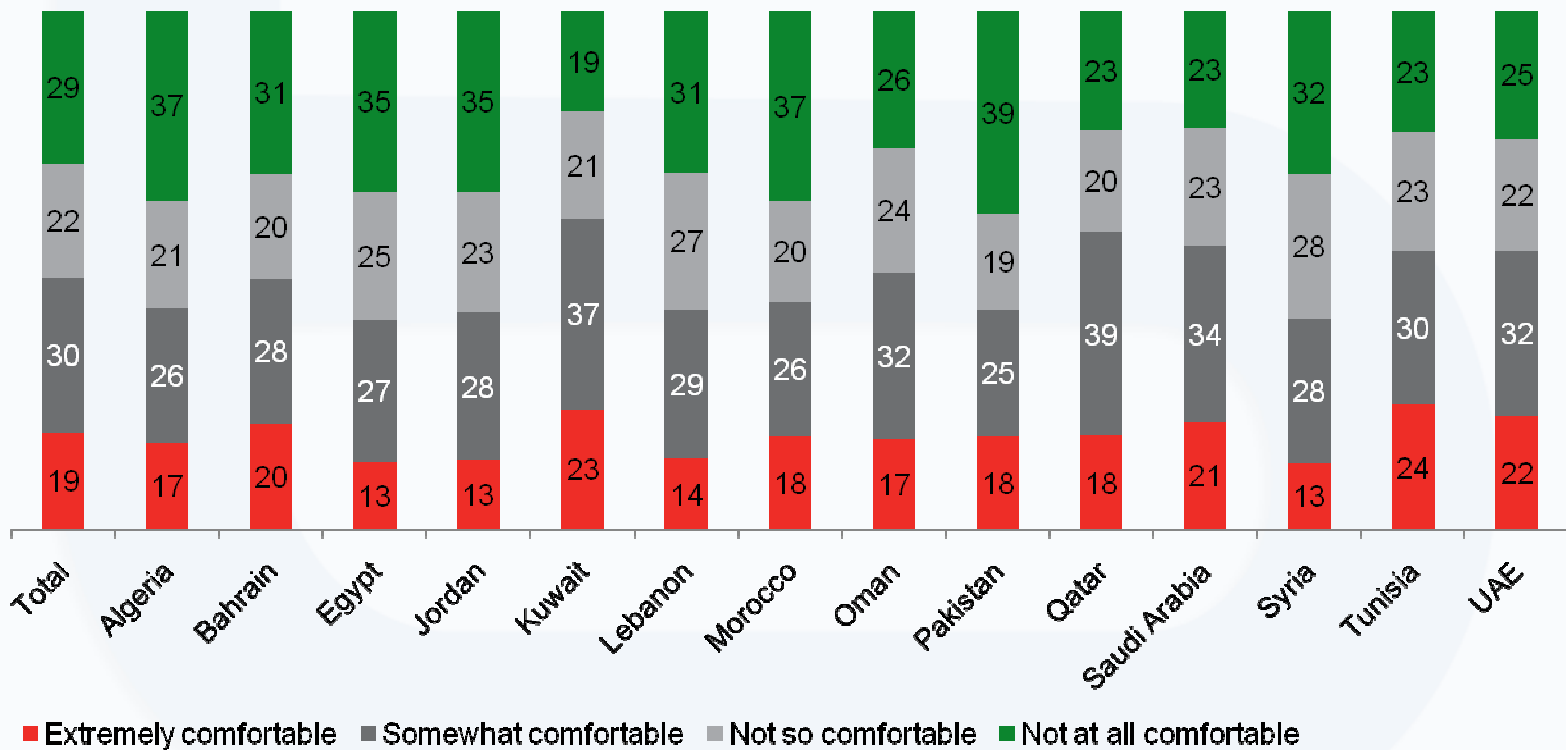
**Kuwait, UAE, Qatar and Tunisia have stronger comfort level**



## Level of Comfort with Online Payments 2/2

What is your degree of comfort making online payments for : Business matters.

### Kuwait, Qatar, Saudi Arabia, UAE and Tunisia more comfortable



## Social Networking Sites

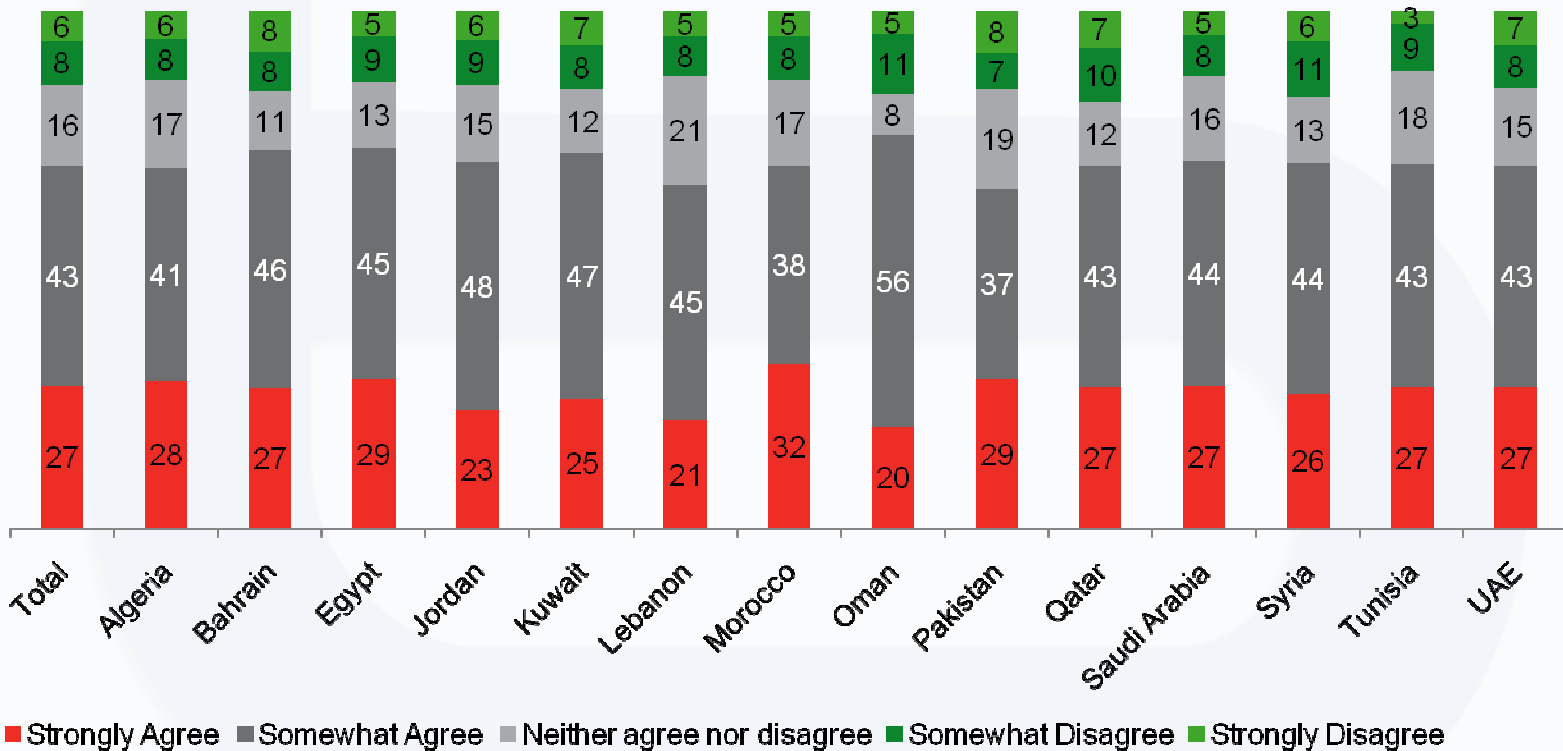
Which one of the following best describes social networking websites (like facebook, orkut, myspace etc)

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<b>Achieved Sample size</b>	<b>13,847</b>	<b>558</b>	<b>89</b>	<b>2,476</b>	<b>774</b>	<b>443</b>	<b>244</b>	<b>1,496</b>	<b>87</b>	<b>1,084</b>	<b>300</b>	<b>2,693</b>	<b>254</b>	<b>188</b>	<b>1,204</b>
Connecting friends and family	31	34	38	30	27	30	25	35	33	29	36	28	22	35	33
I can't afford not to be a member in this day and age	6	4	8	7	6	4	7	6	1	6	6	6	6	4	5
Invasion of privacy	8	9	6	7	13	10	8	8	3	5	7	9	9	11	8
Business networking and they work	6	8	7	6	5	5	7	6	10	8	4	4	6	12	5
Business networking but they haven't helped me so far	8	13	7	11	7	6	8	12	7	4	5	5	9	9	5
They're great fun	22	9	21	22	22	26	31	13	25	28	26	22	18	21	26
None of the above	20	24	13	18	19	19	14	20	20	19	16	25	30	9	18

## Attitudes towards the Internet 1/4

Given below are some attitudinal statements. Could you please tell us to what extent do you agree with each of them: Online activity has disrupted normal social activity, relationships are now mostly "virtual"

### Most respondents feel that real social activity is being sidelined by virtual contact

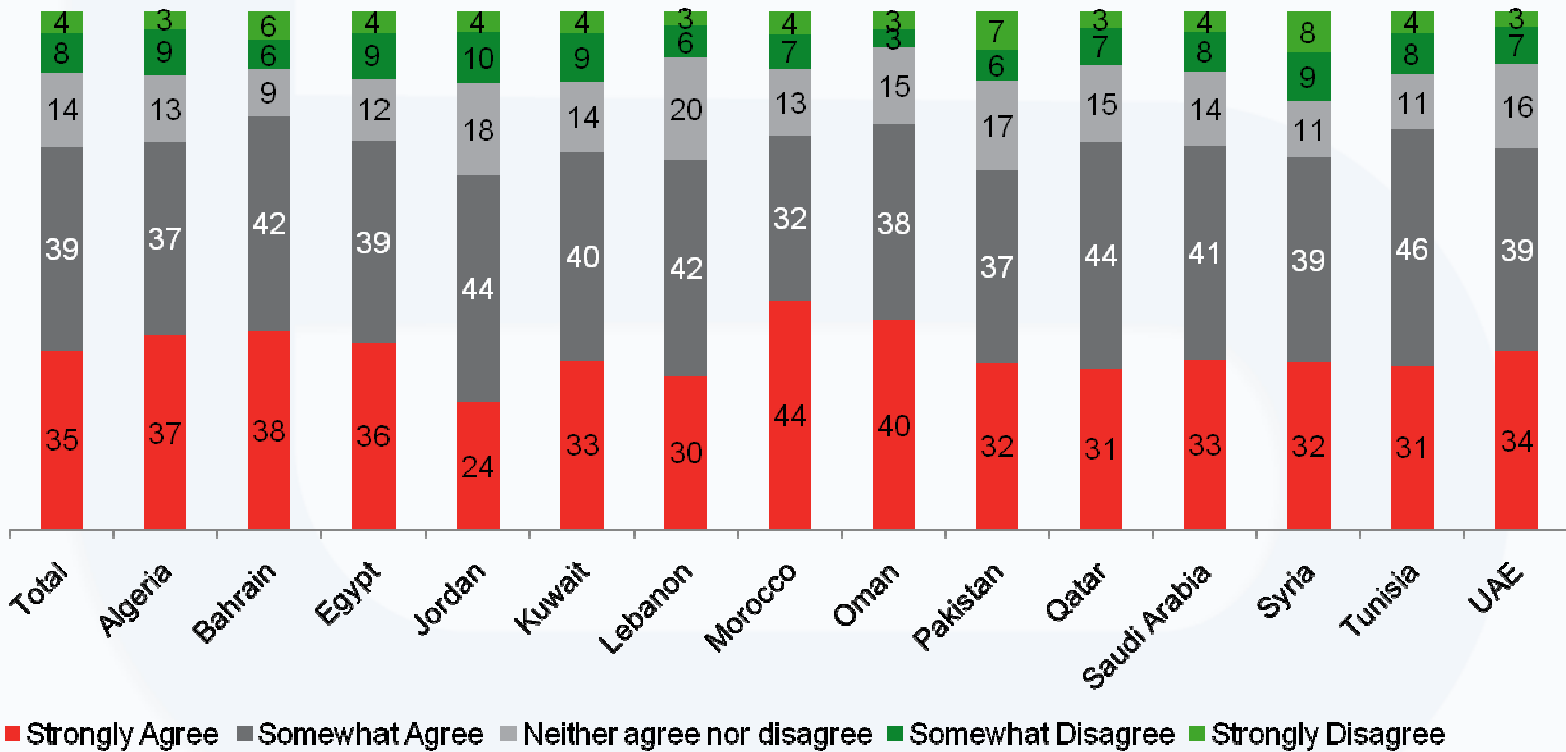




## Attitudes towards the Internet 2/4

Given below are some attitudinal statements. Could you please tell us to what extent do you agree with each of them: The web has been great for social activity encouraging networking otherwise not possible

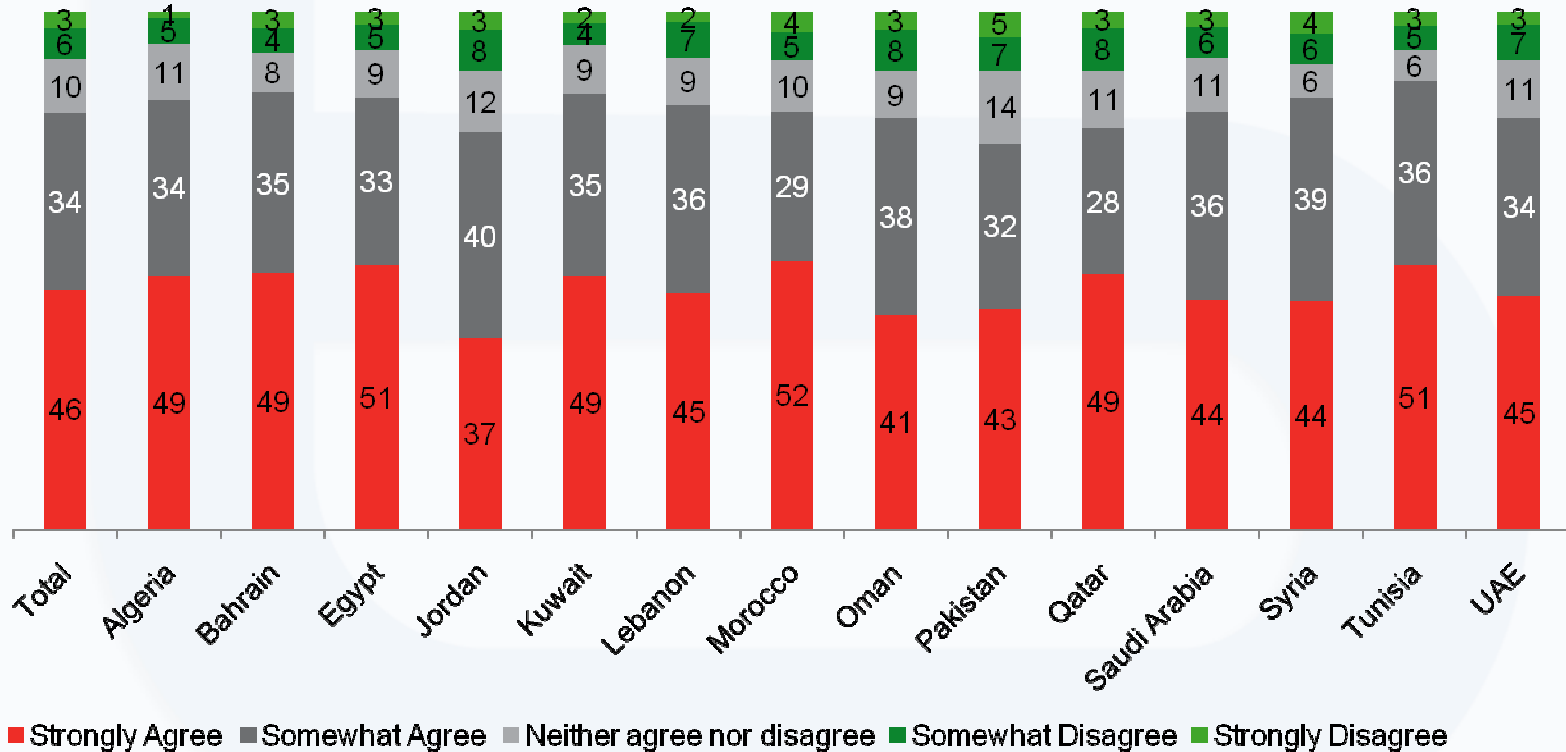
**They also agree that the internet has helped networking which may not have been physically possible**



### Attitudes towards the Internet 3/4

Given below are some attitudinal statements. Could you please tell us to what extent do you agree with each of them: Online communications have largely replaced traditional forms of communication including phone conversations

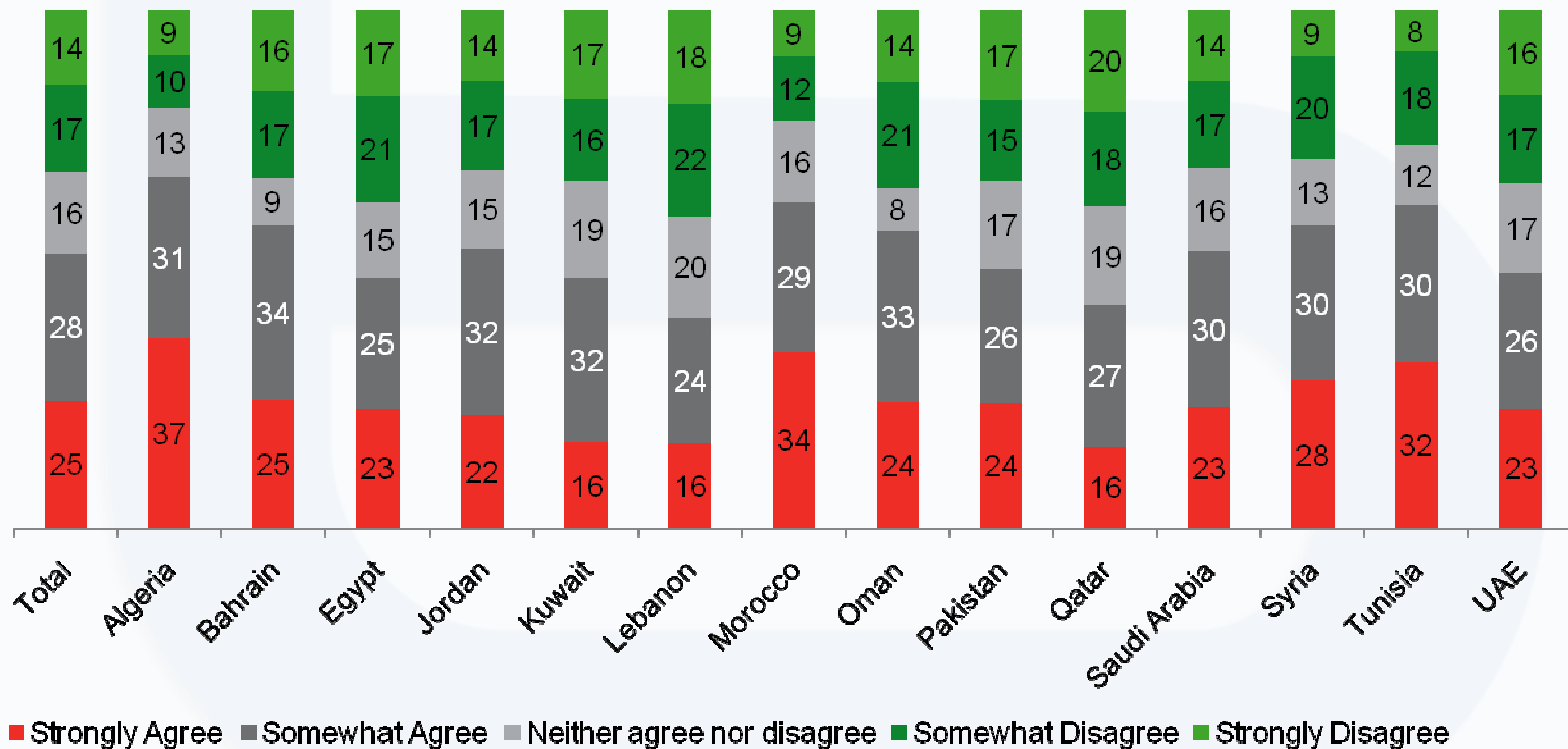
#### Online communication (chatting, email) is felt to be replacing traditional forms like telephone calls



## Attitudes towards the Internet 4/4

Given below are some attitudinal statements. Could you please tell us to what extent do you agree with each of them: Information on the web is so abundant it is very hard to find what you're looking for

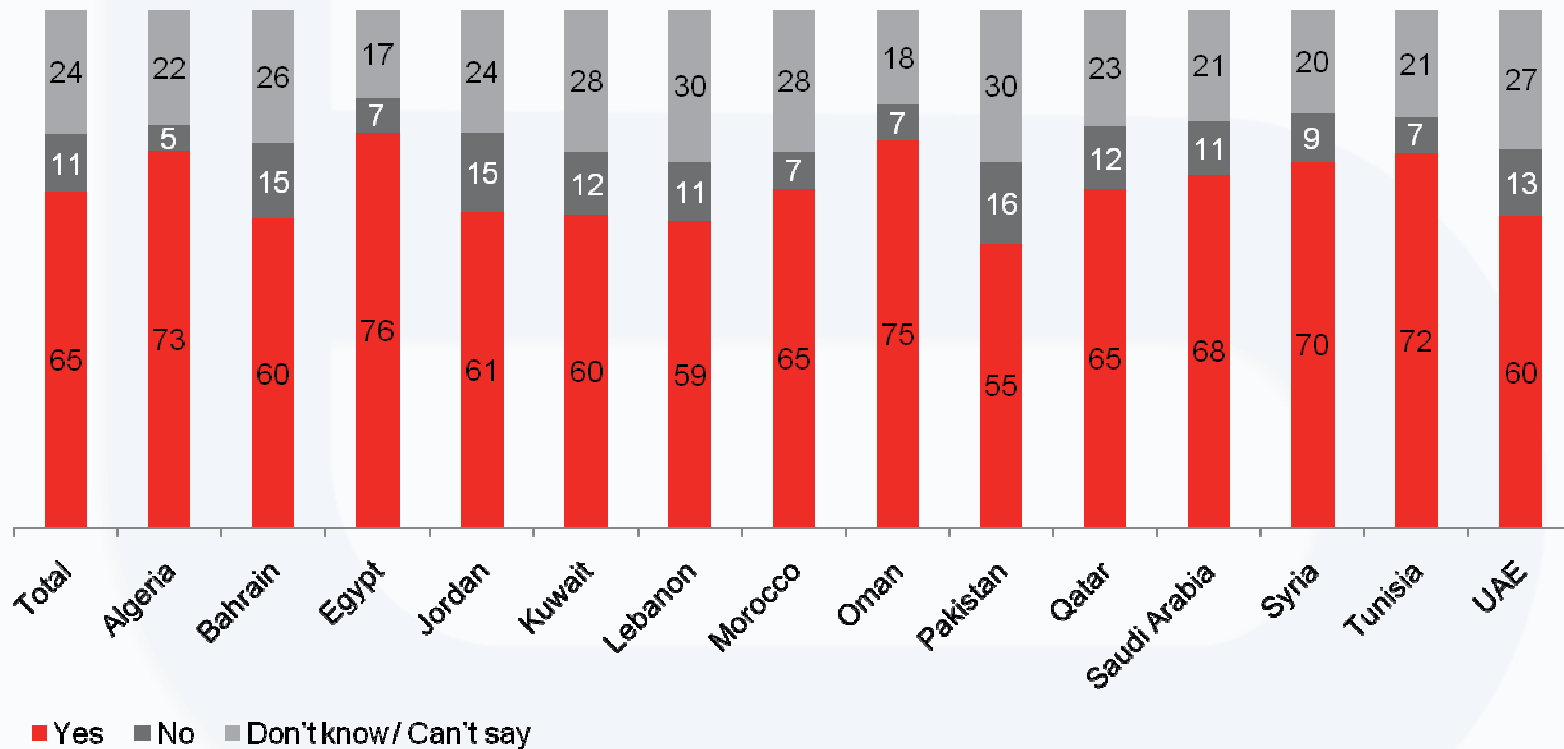
**More than half feel that it is difficult to find the required information given the abundance of data**



## Potential for Online Education

Would you consider taking courses online/ completing an online degree in the future?

Nearly two thirds express an inclination for online education and another quarter are undecided. Egypt and Oman more positively disposed



## The Role of Internet in Purchase Decisions

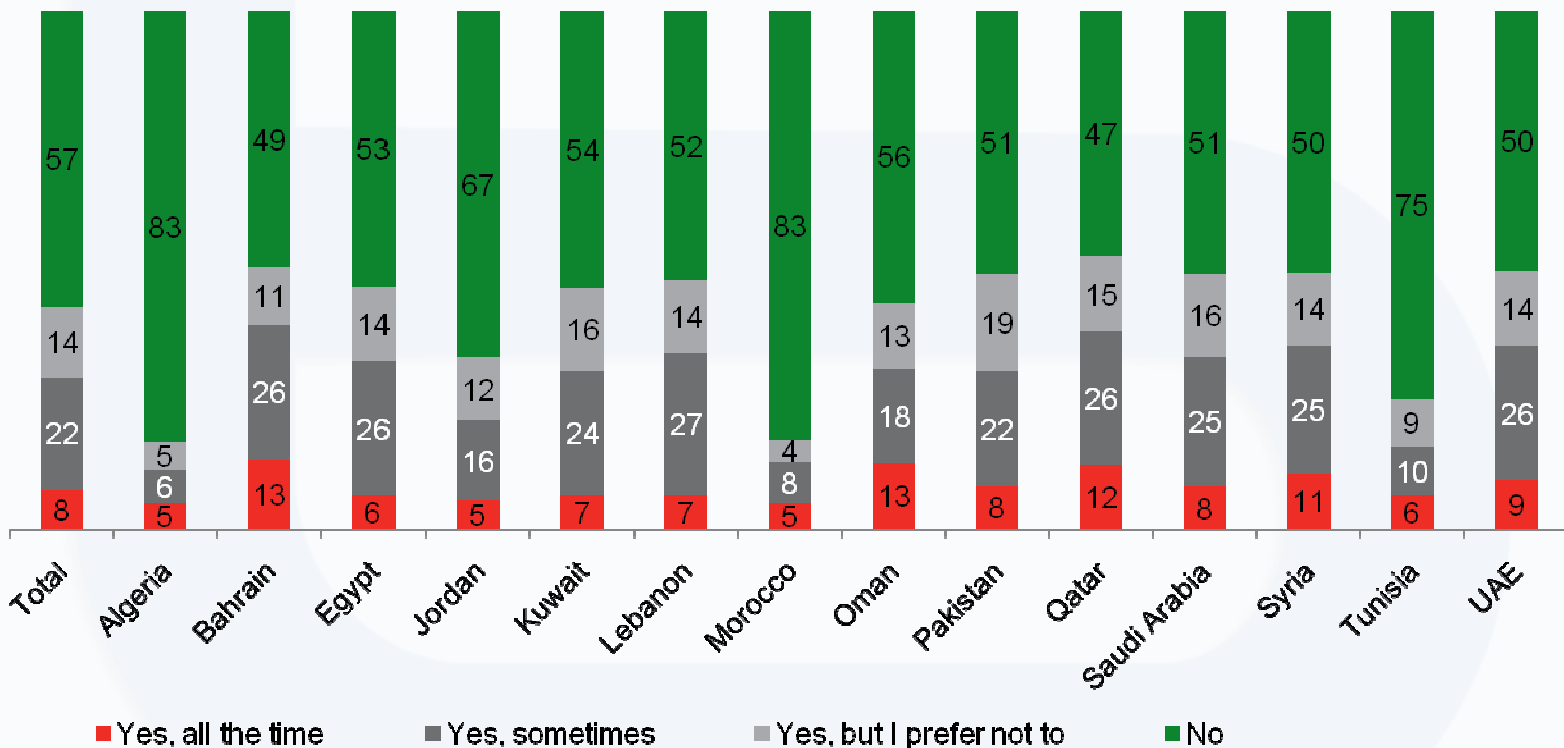
What are the sources of information that you consider before deciding which product or brand to purchase?  
(Please tick all that apply)

Base:	Total	Algeria	Bahrain	Egypt	Jordan	Kuwait	Lebanon	Morocco	Oman	Pakistan	Qatar	Saudi Arabia	Syria	Tunisia	UAE
Achieved Sample size	13,847	558	89	2,476	774	443	244	1,496	87	1,084	300	2,693	254	188	1,204
Recommendations	54	47	62	61	57	60	60	51	51	37	48	59	57	53	57
Websites	50	36	51	53	47	53	56	35	51	52	53	54	44	54	55
Search engine	38	30	44	40	37	40	39	31	41	37	42	40	30	43	41
Newspaper	36	33	33	33	39	40	27	20	40	46	40	35	22	21	42
Televisions	34	28	39	34	31	34	34	25	34	45	37	33	27	31	35
Product demonstration	31	23	36	36	32	34	34	19	29	24	28	34	30	28	35
Salesperson	31	27	33	34	29	33	32	31	32	24	28	34	33	35	32
In-store displays	30	20	31	36	34	32	27	26	28	25	26	31	27	28	35
Email	30	22	38	21	28	33	29	19	39	43	34	32	22	27	35
Magazines	27	18	36	22	21	27	25	20	36	34	32	25	18	29	34
Other sources	25	29	27	25	25	22	24	26	31	26	26	23	29	21	23
Product brochures	24	13	27	21	20	28	24	12	26	24	29	27	26	20	31
Outdoor ads	21	14	24	22	21	22	16	14	20	17	21	25	23	14	21
Radio	13	13	18	12	15	10	12	12	18	12	15	10	10	16	18
Telemarketing	9	5	8	6	8	10	11	4	16	17	9	8	7	6	11

## Incidence of Using Mobile Phones for Email

Do you access email from a mobile device?

Higher incidence in Qatar, Bahrain, UAE, Syria



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