



anrt

agence nationale de réglementation
des télécommunications

الوكالة الوطنية لتقنين المواصلات

ⵜⴰⵎⴻⵔⴰⵏⵜ ⵜⴰⵏⴳⴷⴰⵢⵜ ⵜⴰⵖⴻⵔⴰⵏⵜ ⵜⴰⵏⴳⴷⴰⵢⵜ ⵜⴰⵏⴳⴷⴰⵢⵜ

ICT EQUIPMENT AND USES IN 2020

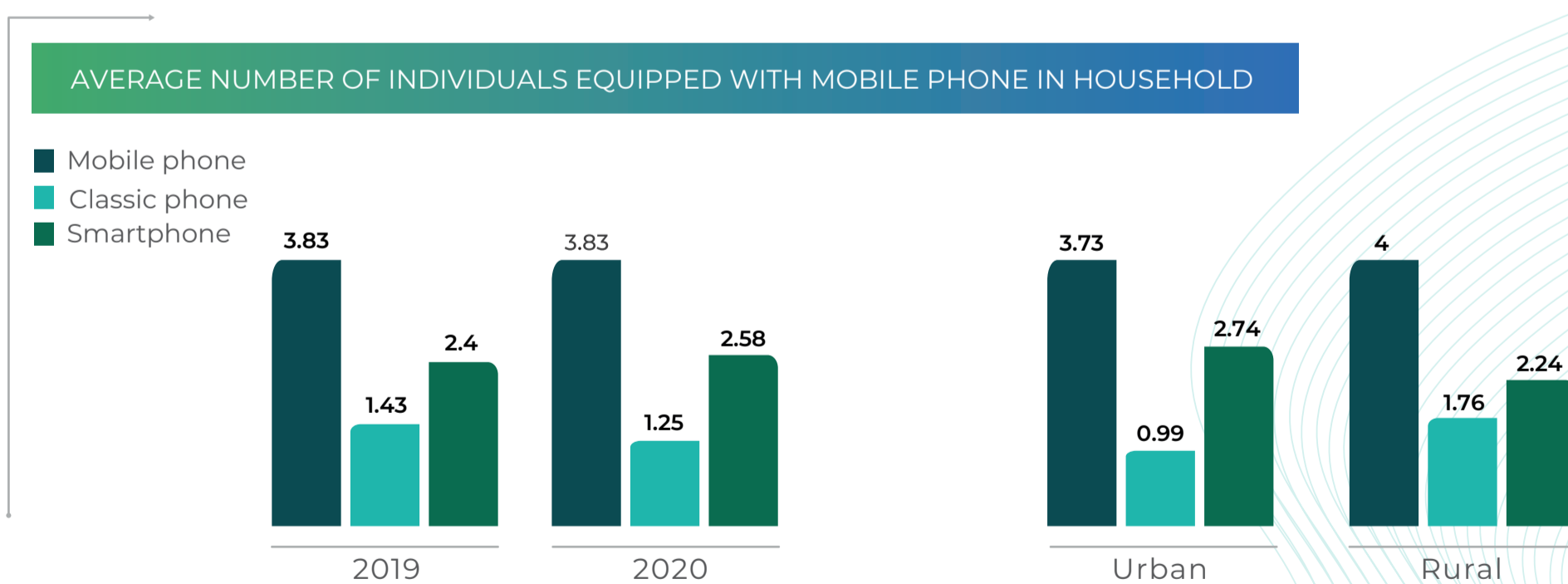
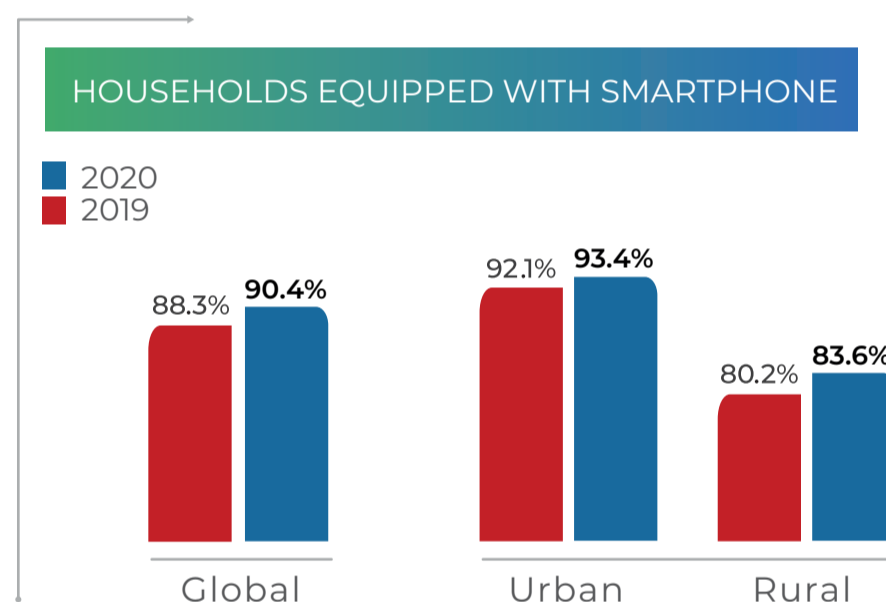
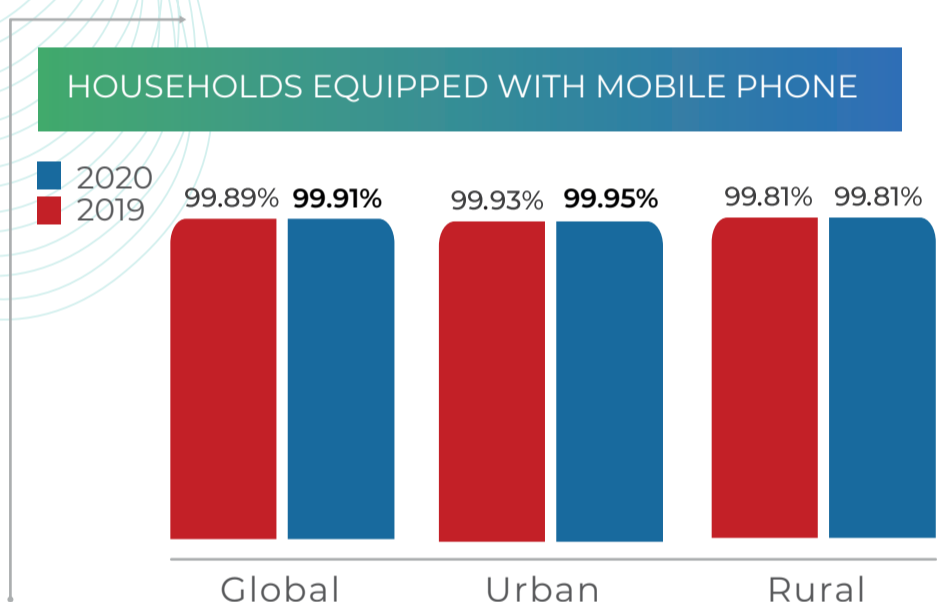
This survey was conducted in partnership with the Ministry of Industry, Commerce and Green and Digital Economy, the High Commission for Planning, the Economic, Social and Environmental Council, the High Authority of Audiovisual Communication, Bank Al-Maghrib, the National Control Commission for the Protection of Personal Data, the Agency of Digital Development and the National Agency for Telecom Regulations.



ICT in Households



Almost all households are equipped with mobile.





While in 2019 **PC** and **Tablet** equipment stabilized, 2020 recorded a substantial increase with 64.2% equipment rate

COVID19 Effect :



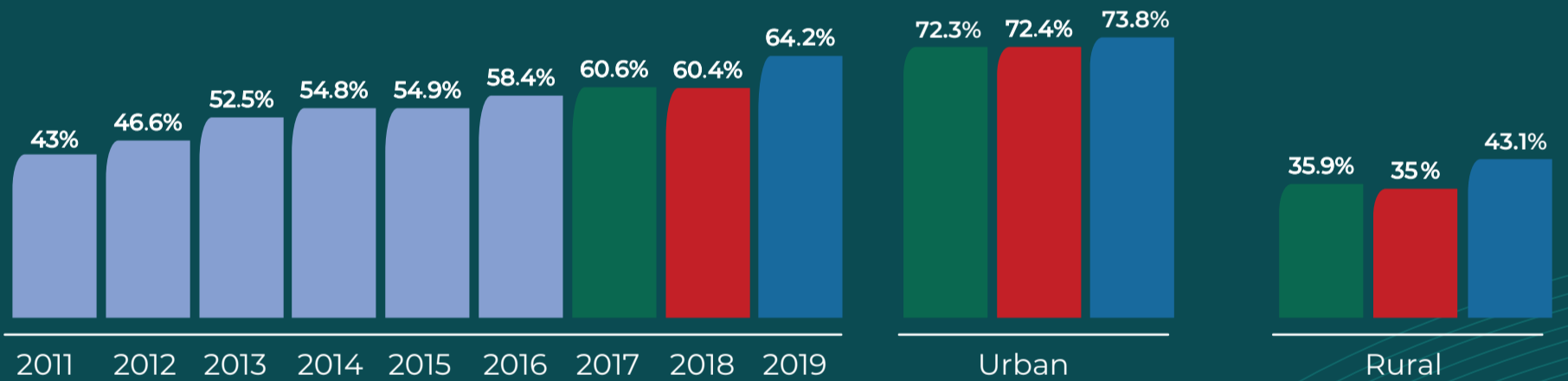
Teleworking, e-learning and e-commerce have resulted in increased demand for laptops and tablets.



Desktop computers are in sharp decline: this is the corollary of factors related to teleworking. One in three households is equipped with a tablet, thus confirming the trend towards mobility. There is an interesting jump in rural areas with **+8 pts.**

HOUSEHOLDS EQUIPMENT WITH COMPUTERS AND / OR TABLET

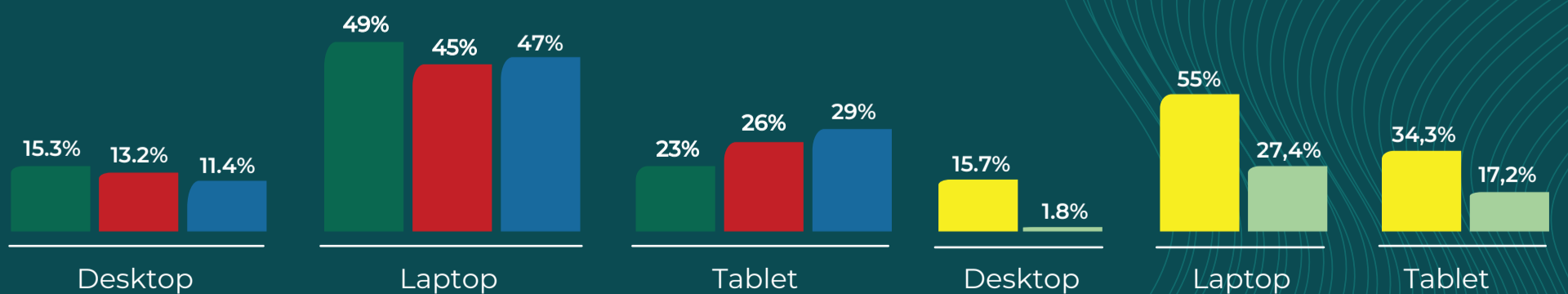
2020
2019
2018



EQUIPMENT BY TYPE (Households)

2020
2019
2018

Urban
Rural

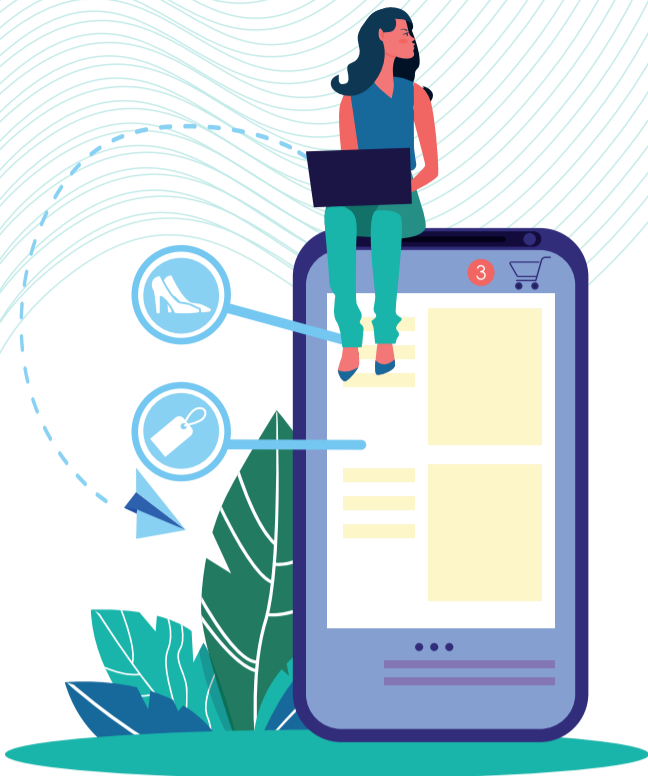


Internet Household Equipment

Internet access equipment increased among Moroccan households in 2020.

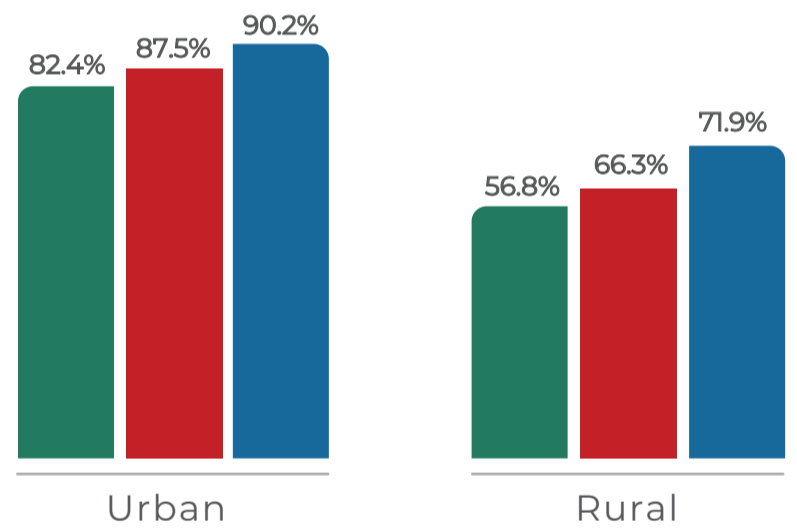
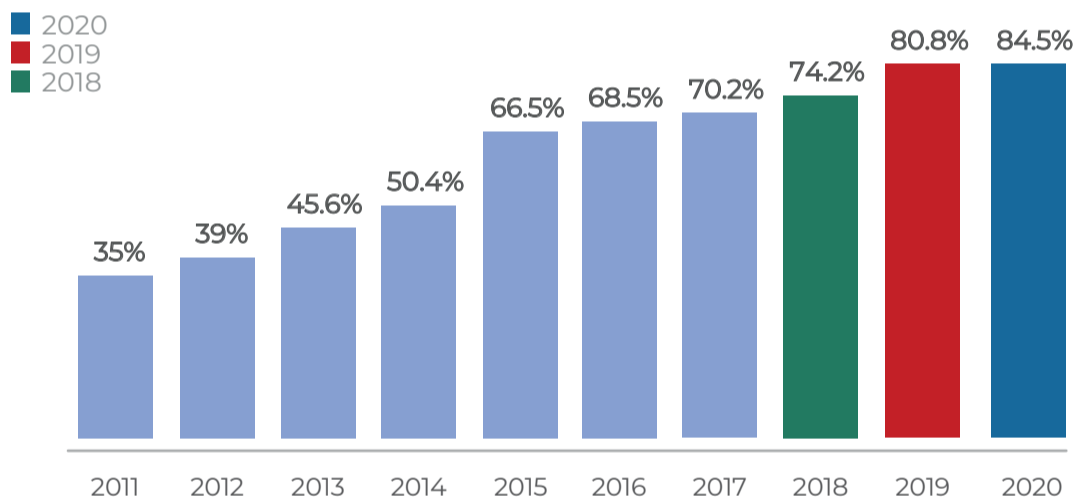
- Household Internet access equipment concerns more than 8 out of 10 equipped households at national level.

- The increase is more important in rural areas.



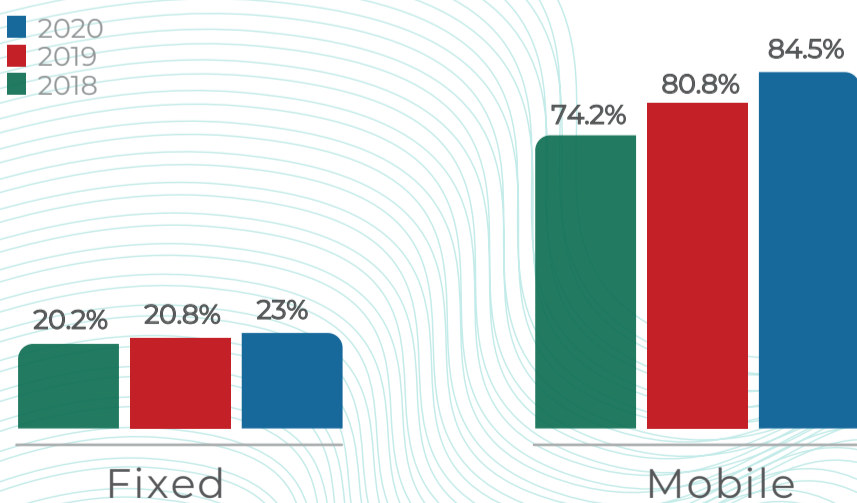
INTERNET EQUIPMENT

(Households)

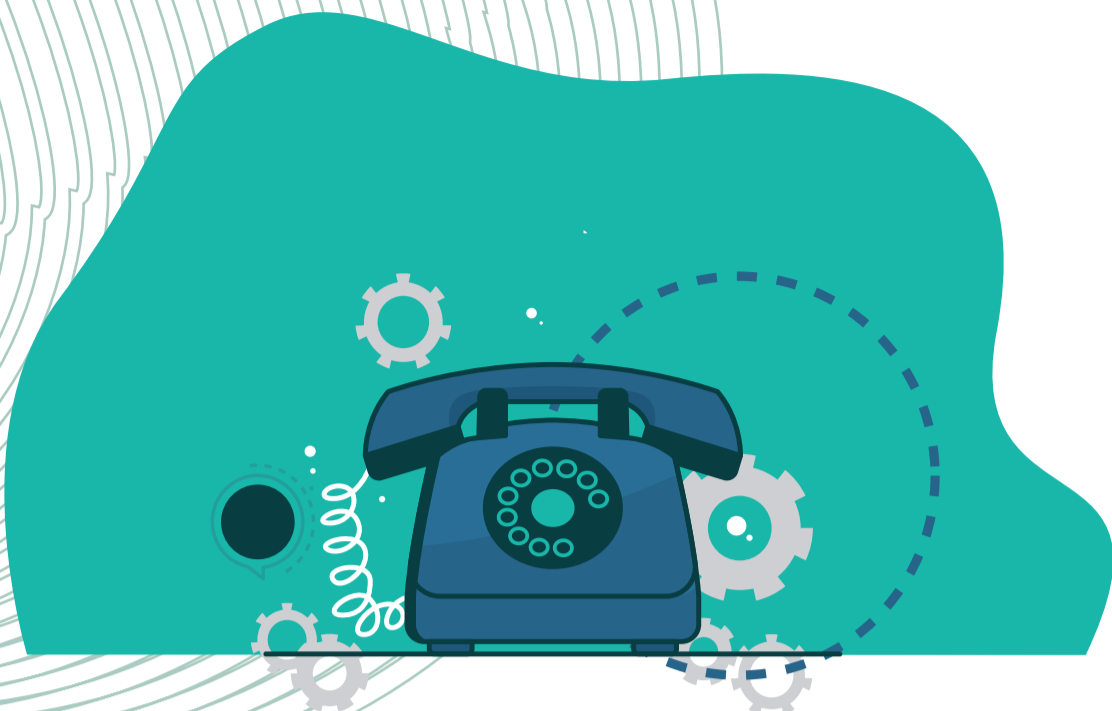


INTERNET ACCESS BY TYPE

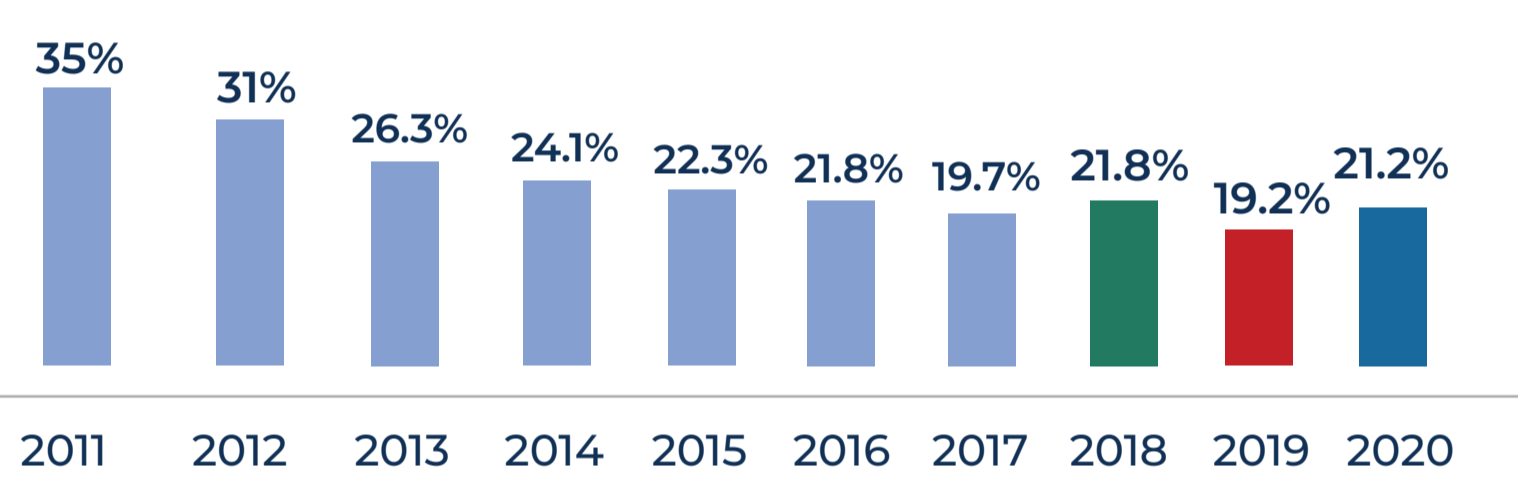
(Households)



In the context of Covid-19, households have equipped themselves with a fixed telephone : + 10% on average. The progression is stronger in rural areas.

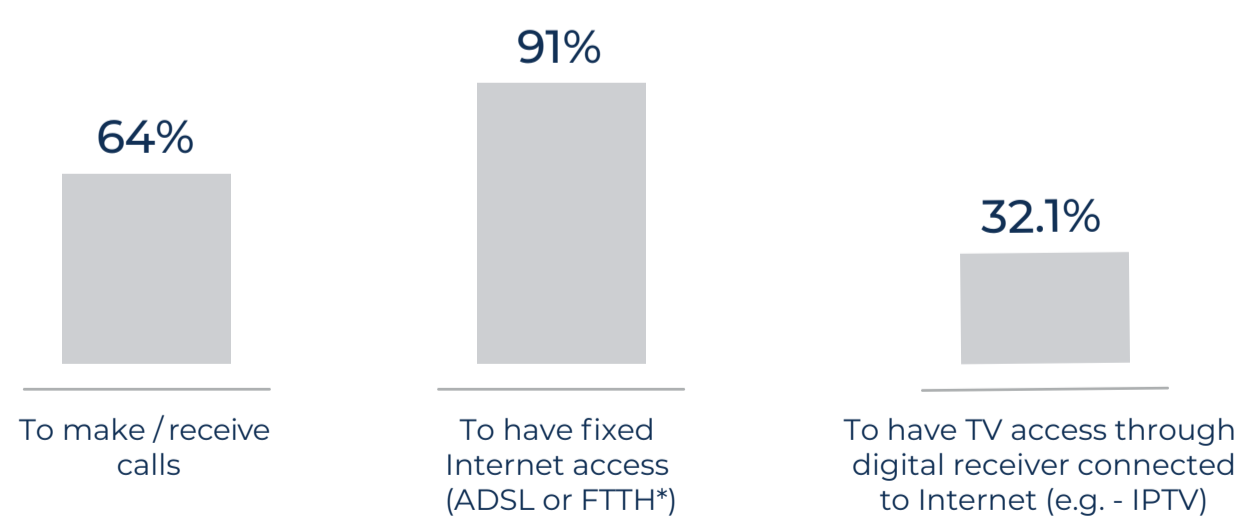


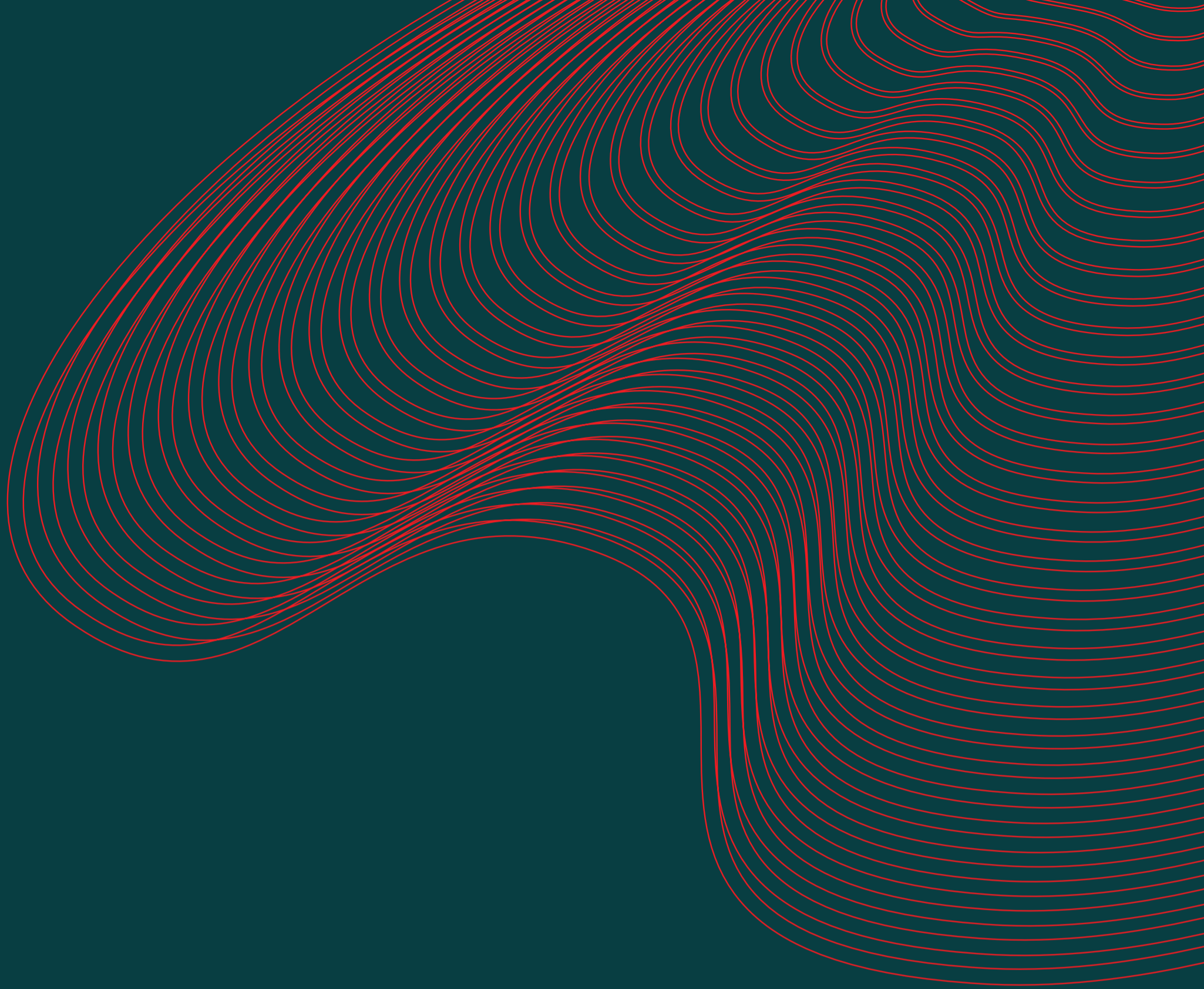
FIXED TELEPHONY EQUIPMENT (Households)



2020
2019
2018

MOTIVATIONS FOR EQUIPMENT IN FIXED TELEPHONY (among households equipped with fixed telephony)





ICT for Individuals

Mobile telephony has reached saturation, which resulted in a slight variation of the equipment rate

The growth of mobile telephone accounts is progressing faster than the demographic growth:

More than 840,000 new people have acquired a mobile phone.

This represents 140% of the population growth between 2019 and 2020 (+365,000).

INDIVIDUALS EQUIPPED WITH MOBILE PHONE

Individuals aged 5 and over

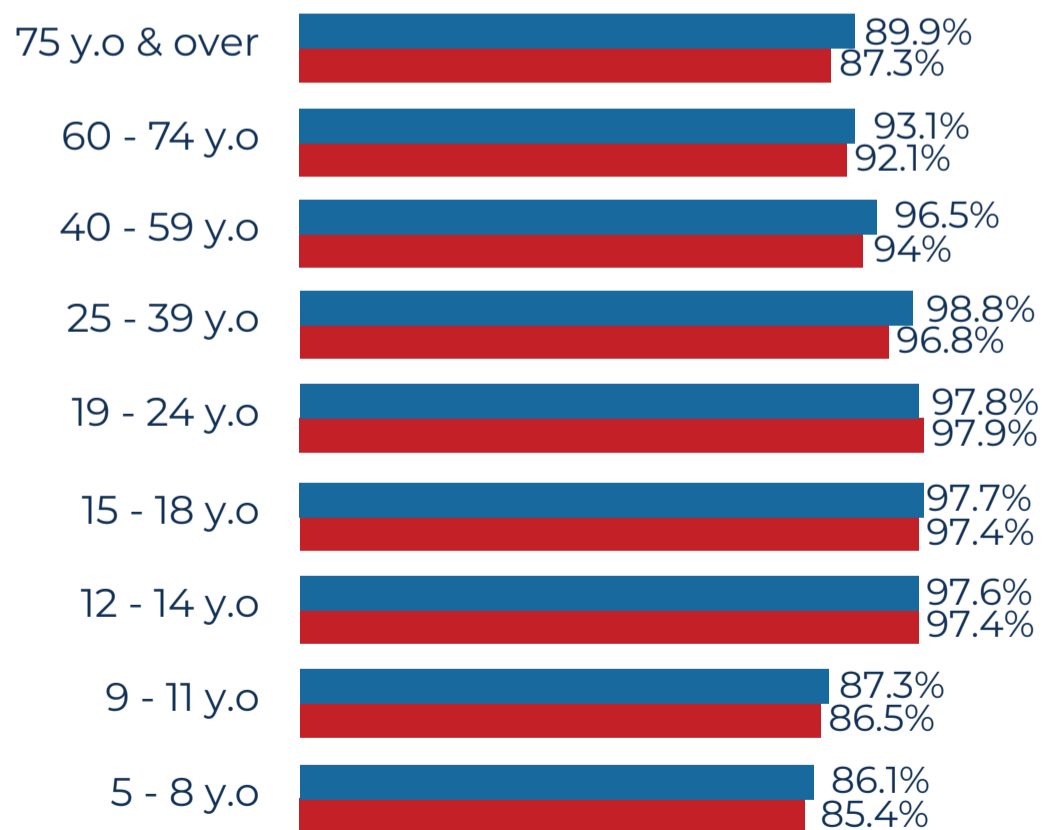
■ 2020
■ 2019



MOBILE PHONE EQUIPMENT BY AGE

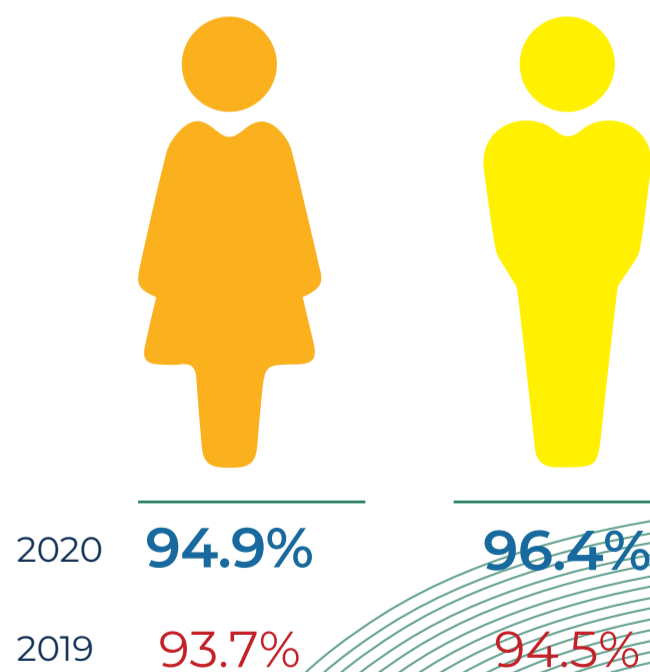
(Individuals aged 5 and over)

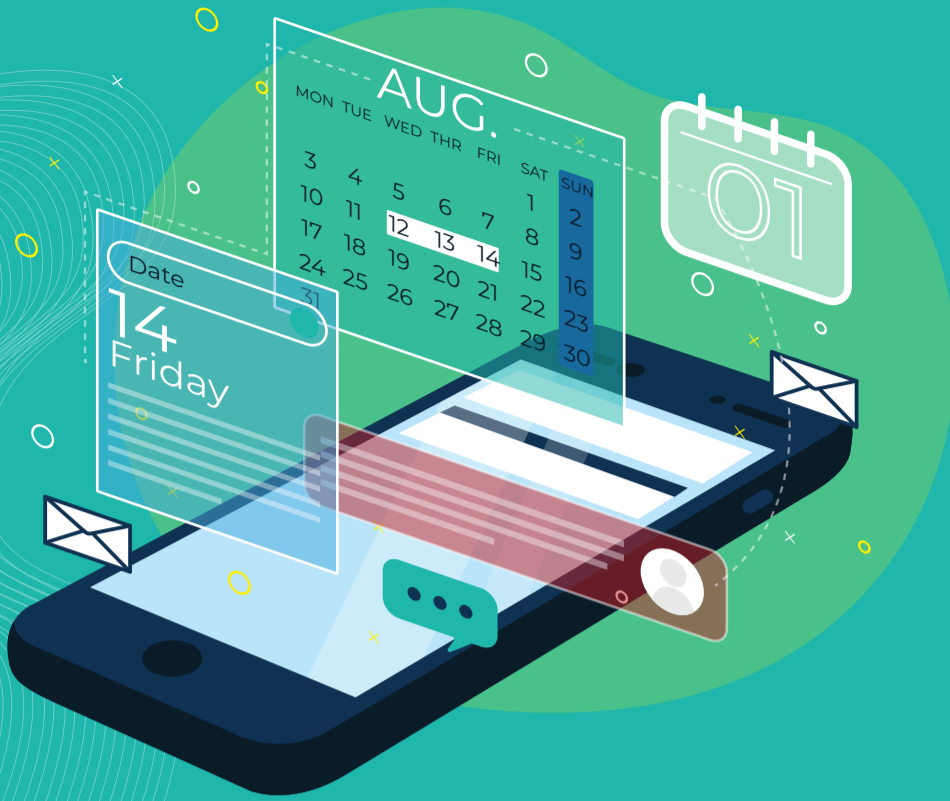
■ 2020
■ 2019



MOBILE PHONE EQUIPMENT BY GENDER

(individuals aged 5 and over)





25.7 million individuals aged 5 years and over are equipped smartphones.

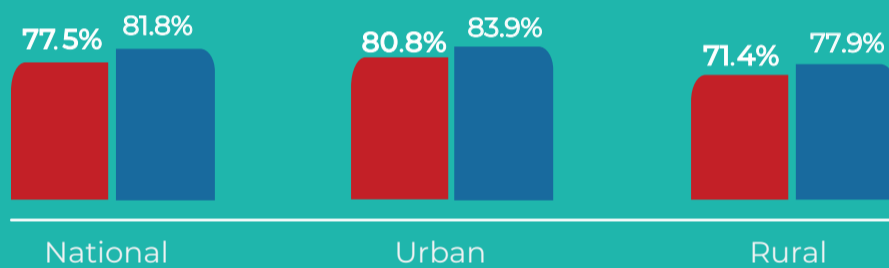


A great increase in smartphone equipment in rural areas.

SMARTPHONE EQUIPMENT

(Individuals aged 5 and over equipped with mobile telephony)

■ 2020
■ 2019



SMARTPHONE EQUIPMENT BY GENDER

(Individuals aged 5 and over equipped with mobile telephony)

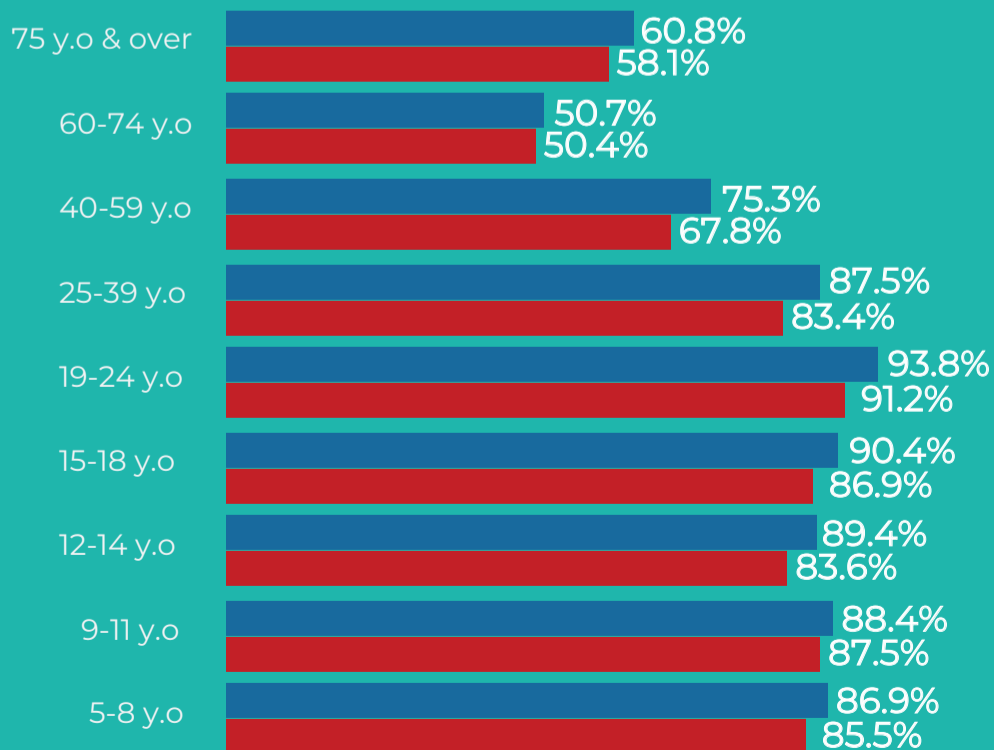


Year	Female	Male
2020	80%	83.5%
2019	73.7%	81.3%

SMARTPHONE EQUIPMENT BY AGE

(Individuals aged 5 and over equipped with mobile telephony)

■ 2020
■ 2019





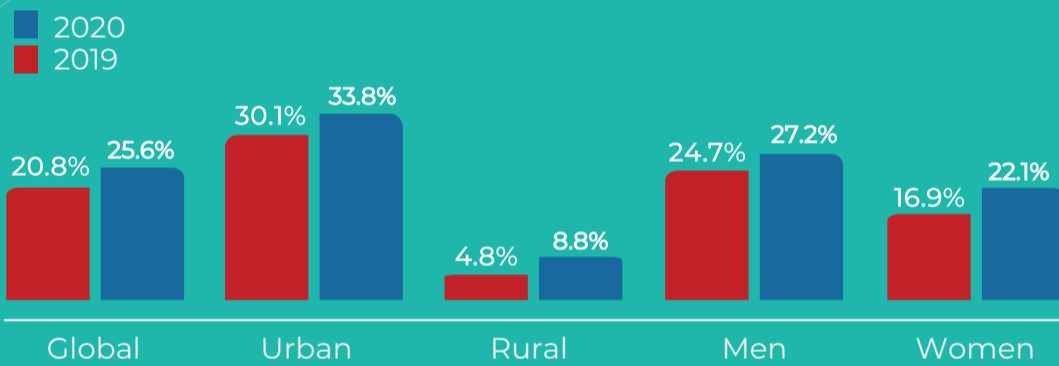
1 out of 4 people own a PC or tablet (smartphone excluded): An increase of 23% compared to 2019

COVID-19 EFFECT :

The rural area is equipped with devices with a growth rate of over 83% against + 12% for the urban area.

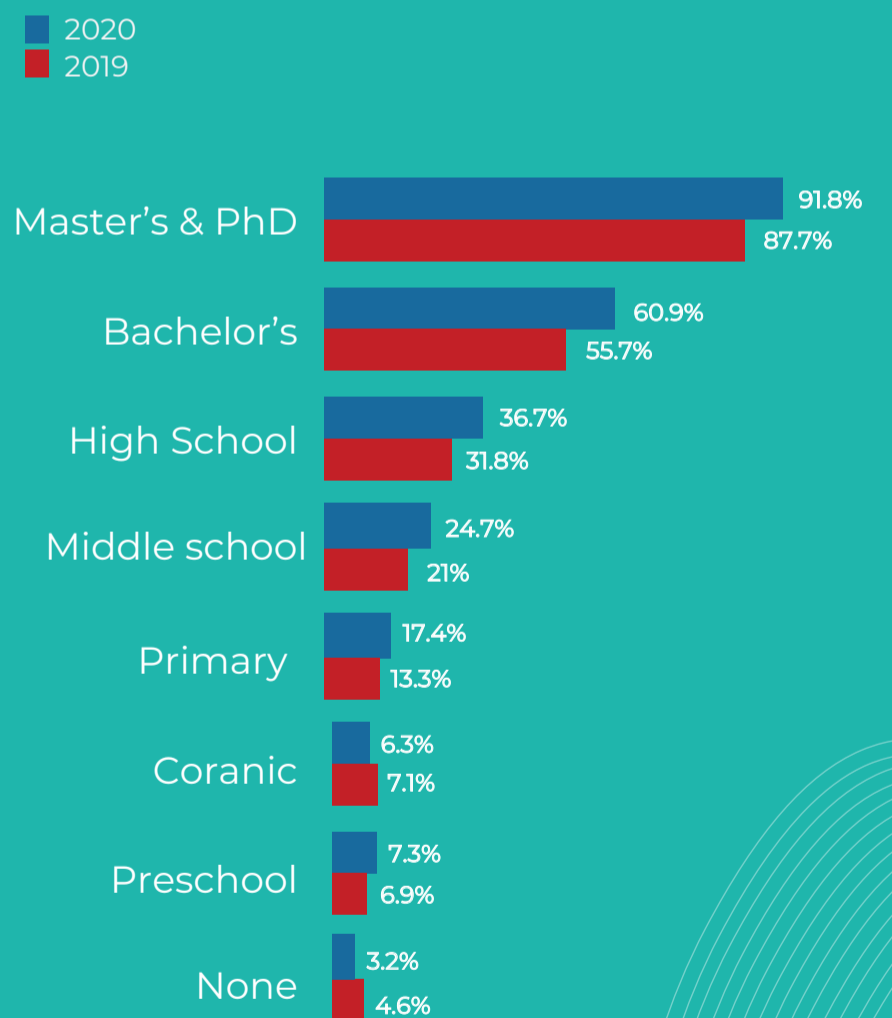
EQUIPMENT WITH COMPUTERS AND / OR TABLETS

(Individuals aged 5 and over)



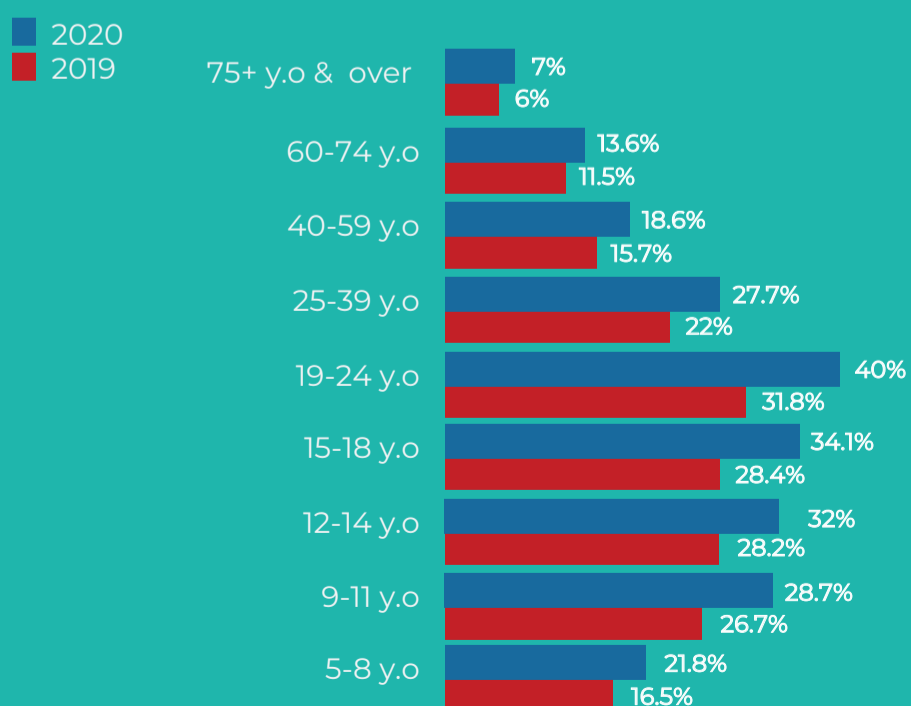
EQUIPMENT IN COMPUTER AND / OR TABLETS BY LEVEL OF EDUCATION

(Individuals aged 5 and over)



EQUIPMENT IN COMPUTER AND / OR TABLETS BY AGE

(Individuals aged 5 and over)



Internet use records a remarkable jump with a rate of 14.4% between 2019 and 2020.



The context of the pandemic and what it entailed in terms of teleworking, e-learning and e-commerce has broadened the Internet users base.

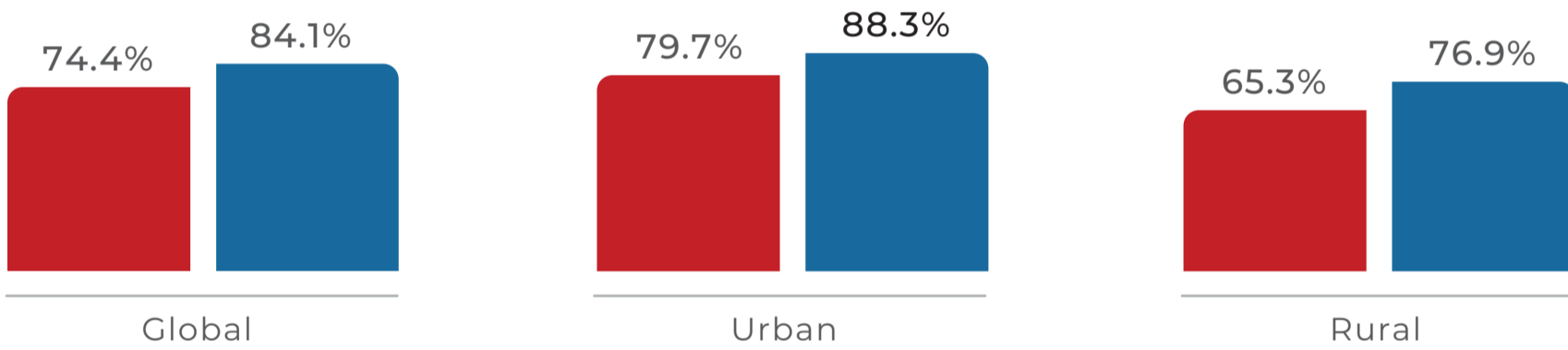
3.5 M more

joined the community of Internet users in 2020.

PROPORTION OF INTERNET USERS

(Individuals aged 5 and over)

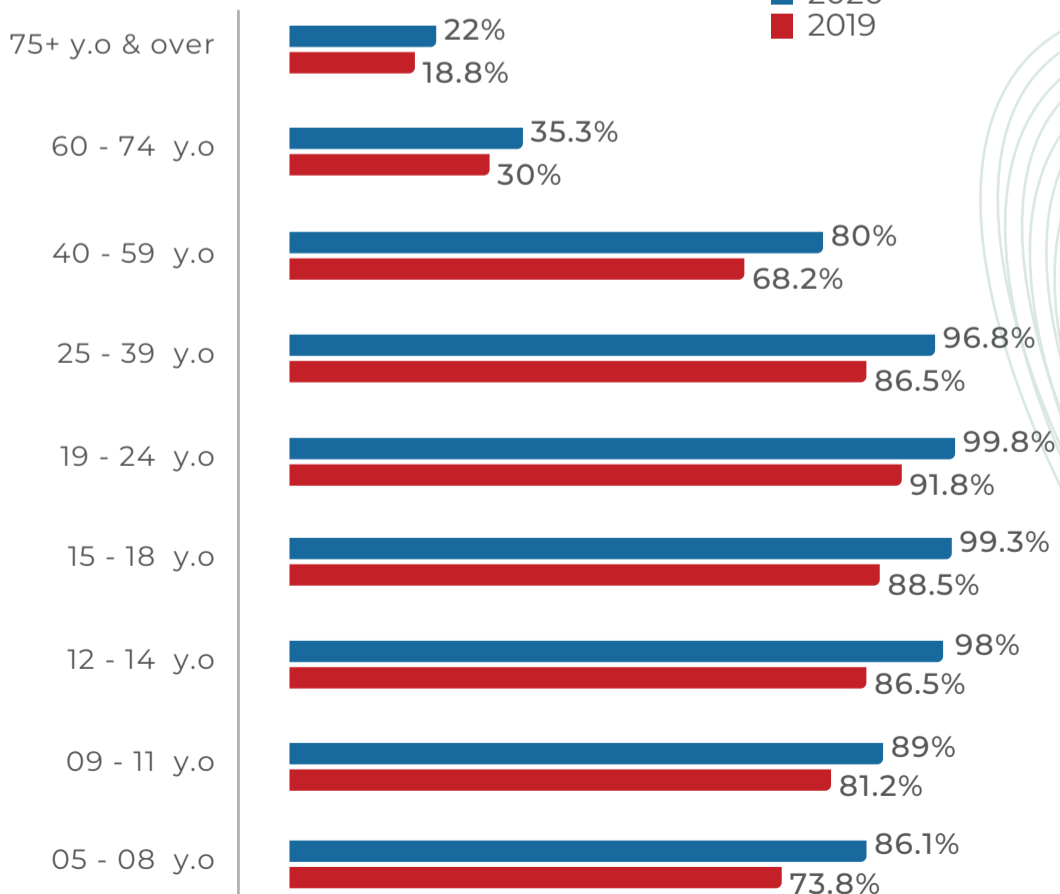
■ 2020
■ 2019



INTERNET USERS BY AGE GROUP

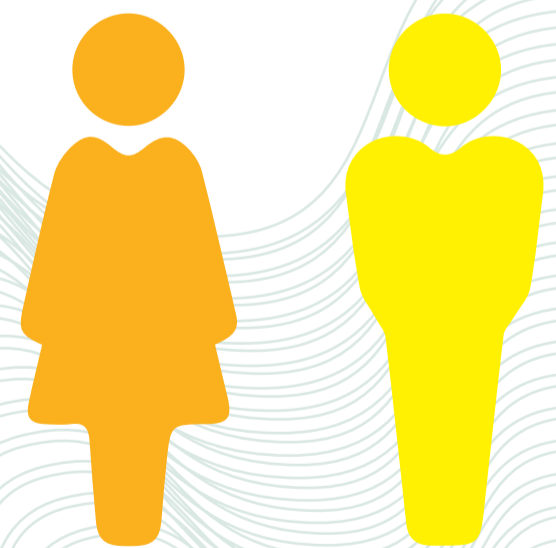
(Individuals aged 5 and over)

■ 2020
■ 2019



INTERNET USERS BY GENDER

(Individuals aged 5 and over)



2020 **81 %** **87.3 %**
2019 **70.2 %** **78.6 %**

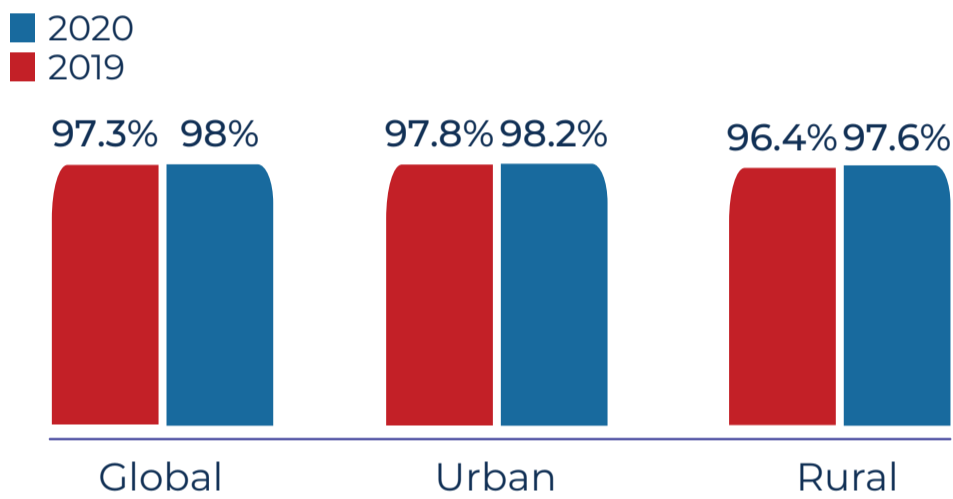


Social networks are a new place of sociability: they attract more Internet users in both urban and rural areas and as many men as women.

With the exception of Internet users aged 75 and over, all age groups exceed the 95% threshold for social media attendance.

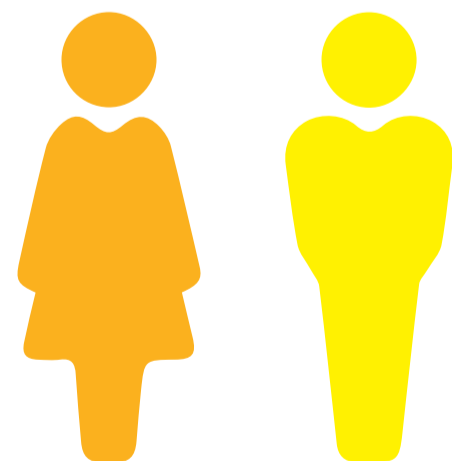
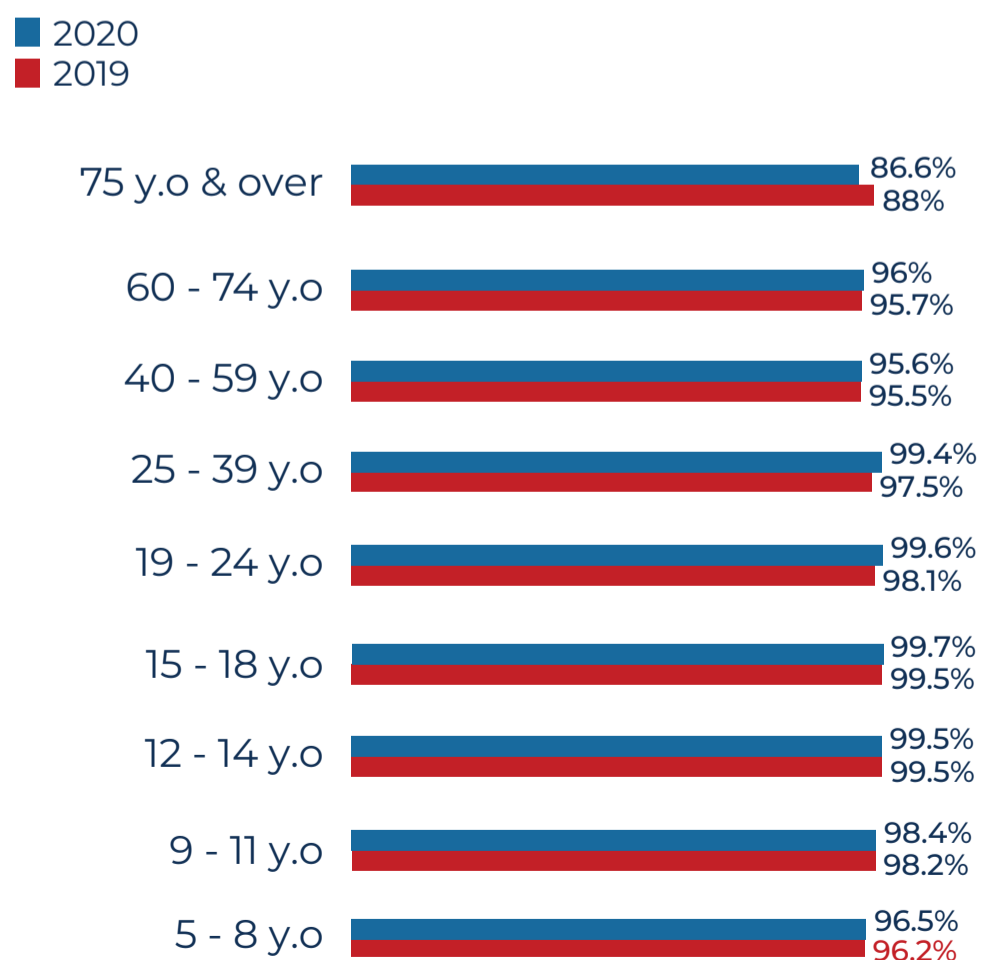
PARTICIPATION IN SOCIAL MEDIA

(Internet users aged 5 and over)



PARTICIPATION IN SOCIAL MEDIA BY AGE AND GENDER

(Internet users aged 5 and over)



2020	98%	97.9%
2019	97.4%	97.3%



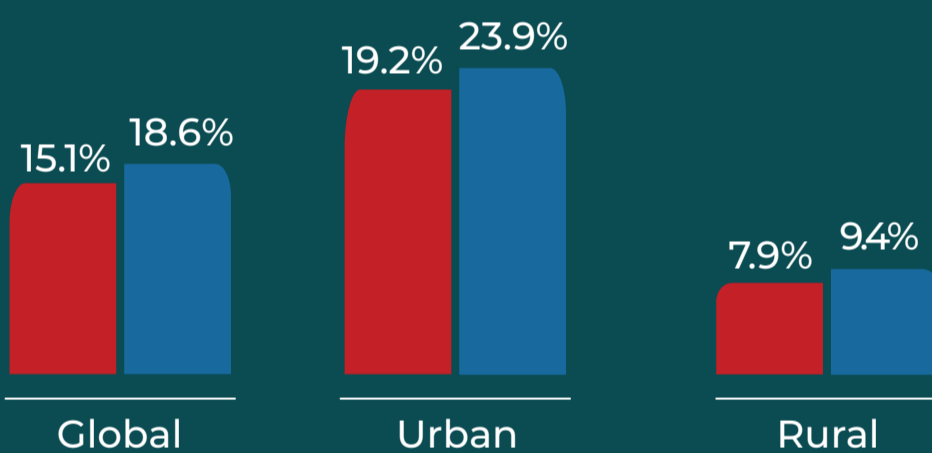
Online shopping has increased by more than **3 points**. In the urban area : **1 out of 4 people** made an online purchase in 2020

The most remarkable phenomenon in 2020 is the frequency of online shopping which is **2 to 5 times** for more than three quarters of the population

INDIVIDUALS WHO HAVE MADE ONLINE PURCHASES/ORDERS

(Individuals aged 5 and over - Year 2019)

■ 2020
■ 2019



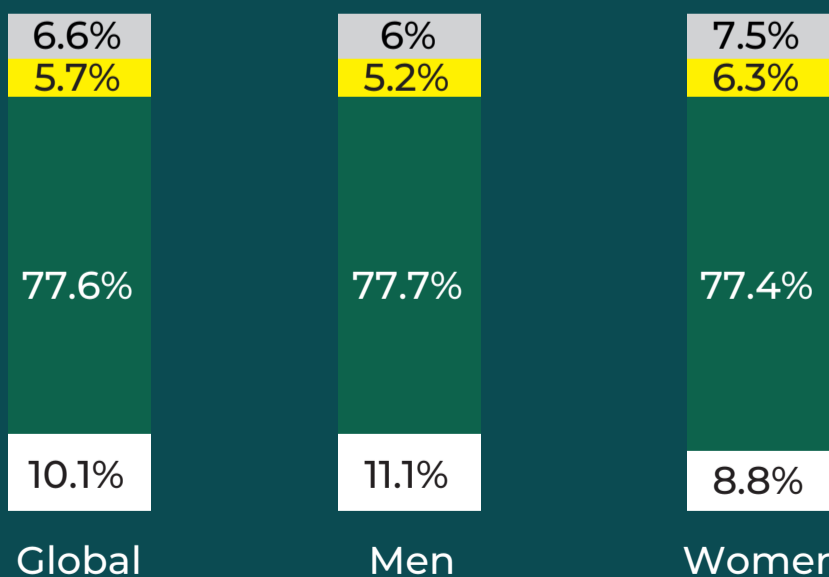
2020 **17.4%**
2019 **12.4%**

2020 **19.9%**
2019 **17.8%**

NUMBER OF PURCHASES / ORDERS CARRIED OUT ONLINE

(Individuals aged 5 and over who made online purchases in 2020)

■ Over 10 times
■ 6 to 10 times
■ 2 to 5 times
■ Once



The pandemic has had a notable impact on the use and perception of digital technology



3 out of 4 people note that their phone use greatly increased during the lockdown.



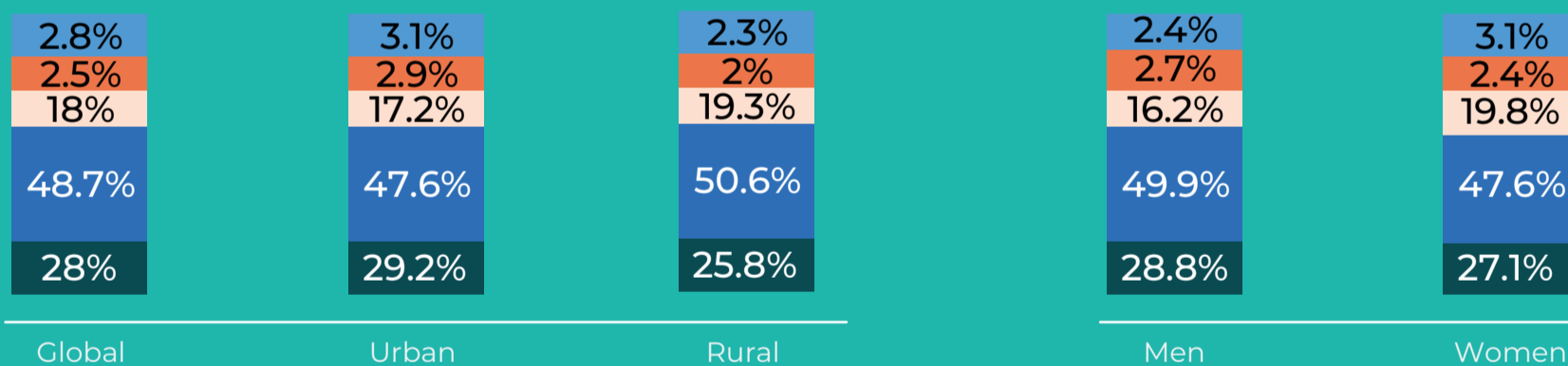
8 out of 10 people note that their internet use increased during lockdown.

Almost 2 out of 3 people have increased their consumption of traditional media.

PHONE USAGE DURING LOCKDOWN

(Internet users aged 5 and over and owning at least a mobile phone)

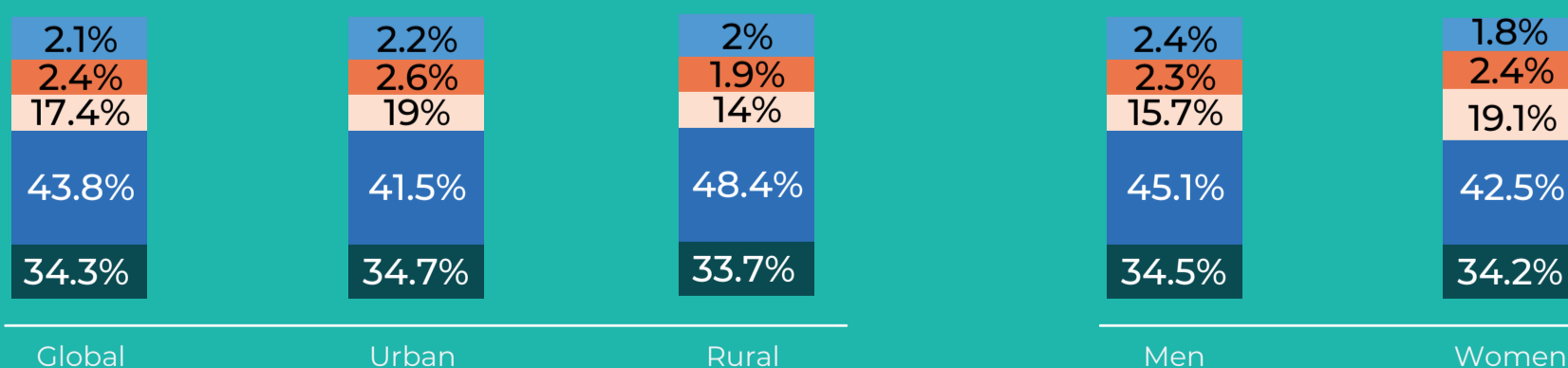
■ Much more important ■ More important ■ Same ■ Less important ■ Much less important



INTERNET USAGE DURING LOCKDOWN

(Internet users aged 5 and over)

■ Much more important ■ More important ■ Same ■ Less important ■ Much less important





8 out of 10 people believe that the pandemic has accelerated the use of digital tools in Morocco and that these changes will last

Whether according to urban/rural area or to the respondent's gender, a large majority of Moroccans have realised that the pandemic has served as a catalyst for the use of digital tools.

In urban area, more than 84% of individuals believe that the changes induced by the pandemic will be maintained.

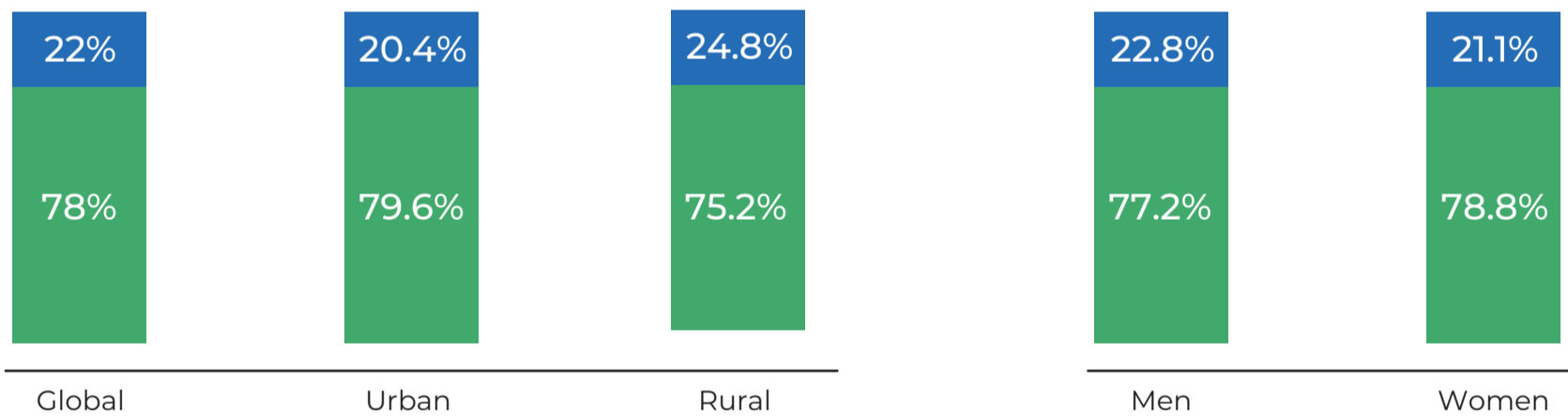


Moroccans have realised that the resulting changes will be lasting.

DO YOU THINK THE PANDEMIC HAS ACCELERATED THE USE OF DIGITAL TOOLS?

(Internet users aged 5 and over)

Yes No



WILL THESE CHANGES INDUCED BY THE PANDEMIC BE SUSTAINED?

(Internet users aged 5 and over)

Yes No

