



ICT INDICATORS COLLECTION SURVEY WITHIN HOUSEHOLDS AND INDIVIDUALS AT THE NATIONAL LEVEL FOR 2018

Results

July 2019

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A probabilistic survey targeting more than 5820 households and 5820 individuals



Targeted population

- The populations targeted by the survey are households living in urban and rural areas in the 12 regions of the Kingdom and individuals aged 5 and over.
- **5820** targeted households.
- **5820** targeted individuals.
- **92%** valid questionnaires.



Reference Population

The most recent master sample (MS) developed by the HCP in 2015 based on the results of the 2014 General Population and Housing Census (GPHC) was used for the probabilistic survey.



Timing

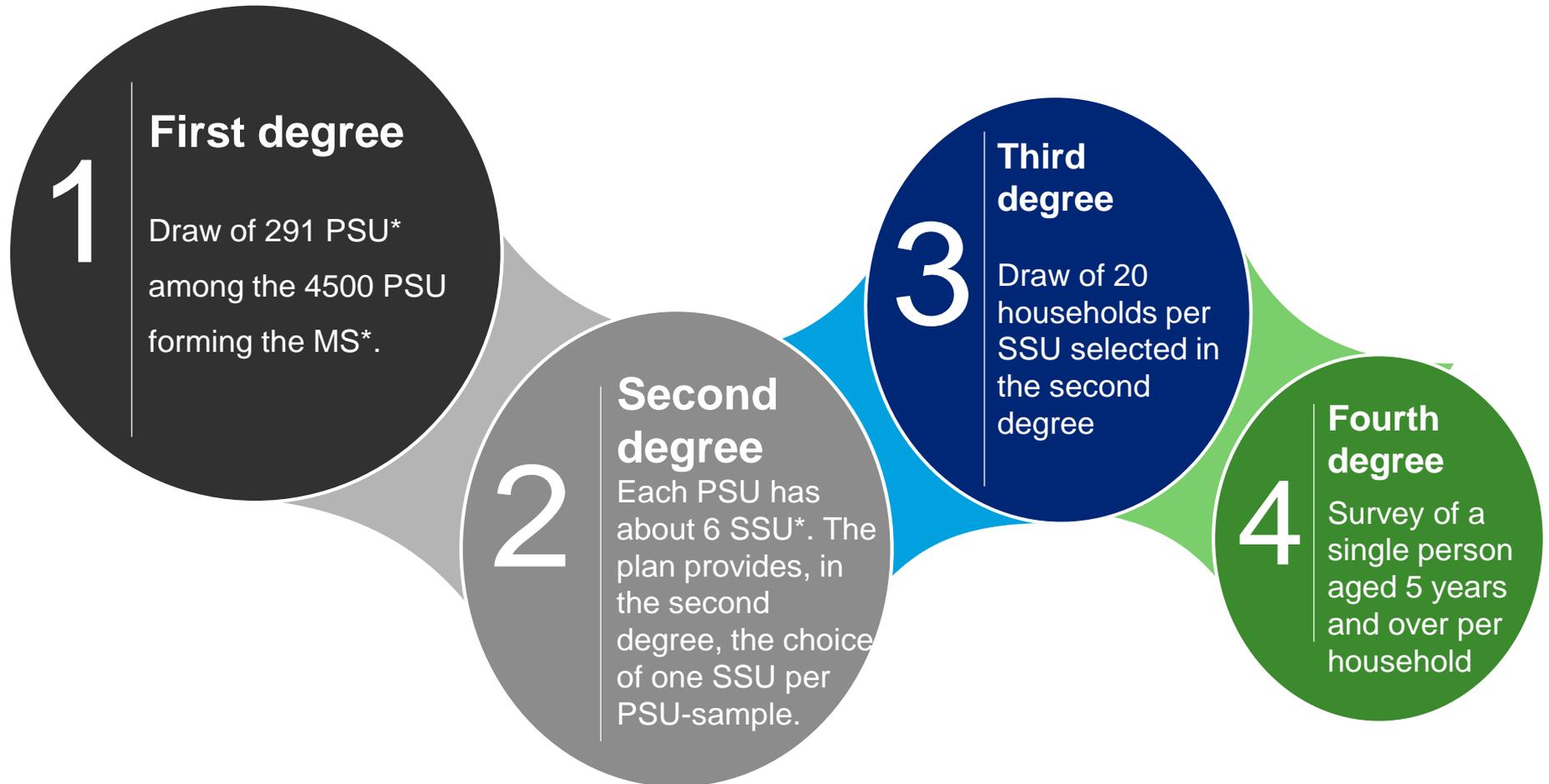
Data collection in the field **from February 18 to March 22, 2019**



Reference Period

- Year 2018 for household equipment and access.
- Last 3 months of the year 2018 for the individuals equipment and usage.

This is a four-stage stratified random draw performed by the HCP (stratification versus habitat strata)



PSU : Primary sampling unit
SSU : Secondary sampling unit
MS : Master Sample

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The observation of the evolution of different ICT indicators within households and individuals reveals a strong adoption of ICTs in the Moroccan society

Two ratios show the significant increase in equipment allowing Internet use, both for households and individuals:

1. Household equipment with Internet access : 14,6% average growth rate (2010-2018) ;
2. Smartphone equipment within individuals: 25,9% average growth rate (2011-2018).



* Compounded Annual Growth Rate

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Most urban and rural households own at least one mobile phone

The number of individuals equipped with all types of telephony devices in the household is stationary compared to 2017.

This phenomenon is the result of two factors of demographic changes :

1. Household size tends to shrink from one year to the next
2. The growth of the urban population is stronger than that of the rural population one year to the next.

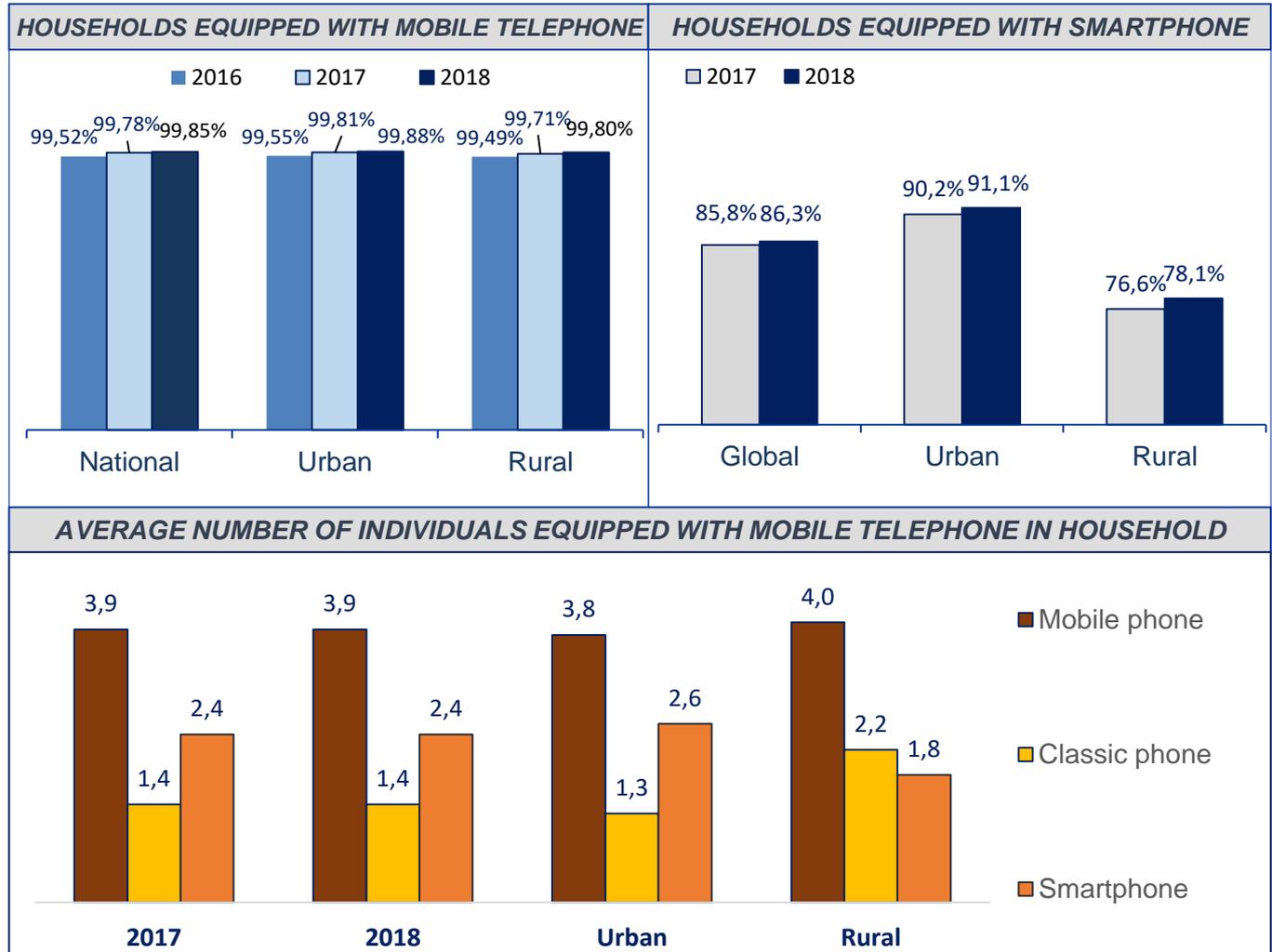


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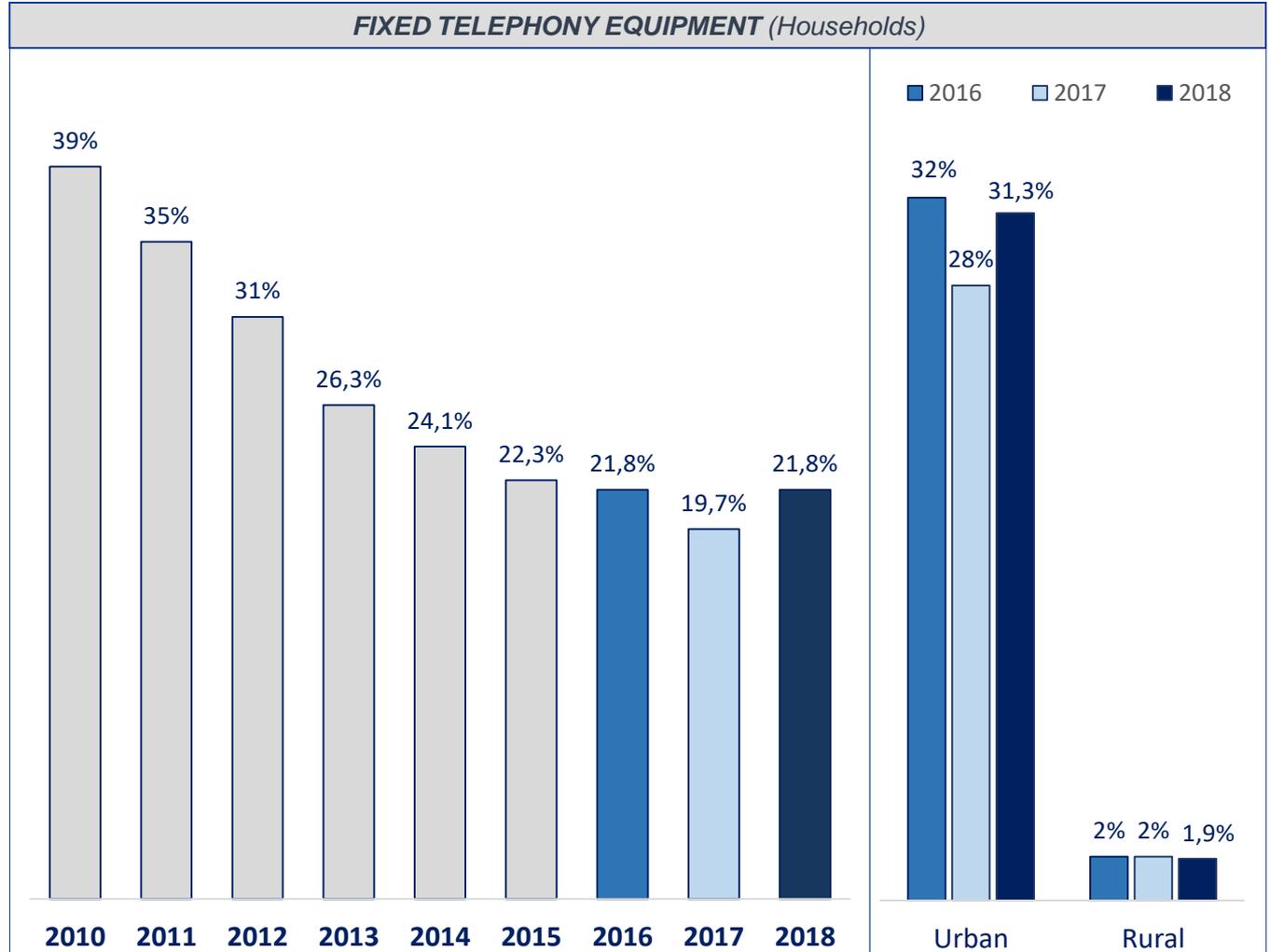
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Fixed telephony equipment within Households

Fixed telephony increased in 2018.



Household equipment with fixed telephone is always motivated by Internet access

Motivations for the equipment with fixed line :

- The connected household is the main feature of fixed line equipment.
- TV access via a digital access is one of the rising uses. The figure increases from 19% in 2017 to 26.7% in 2018.

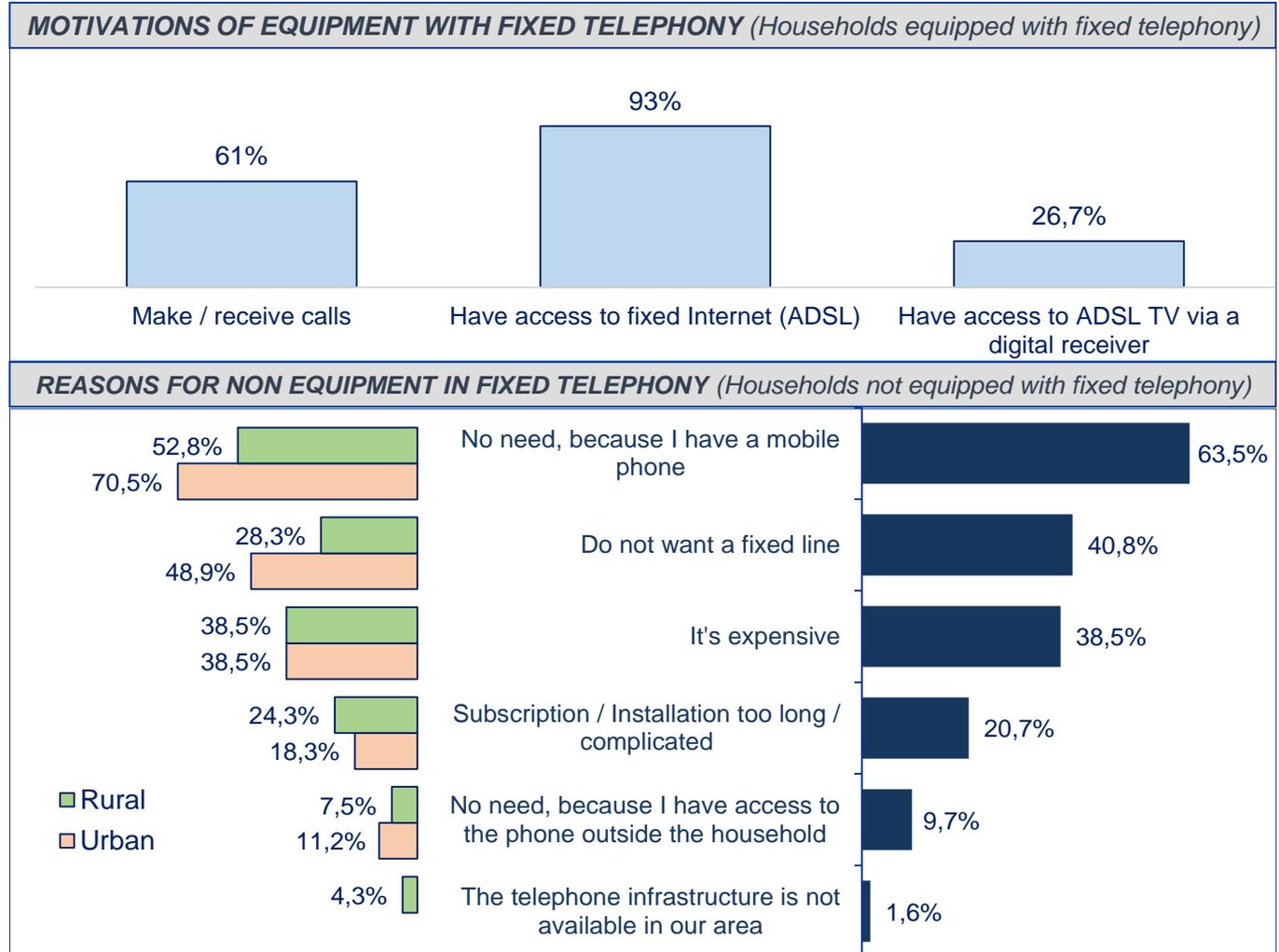


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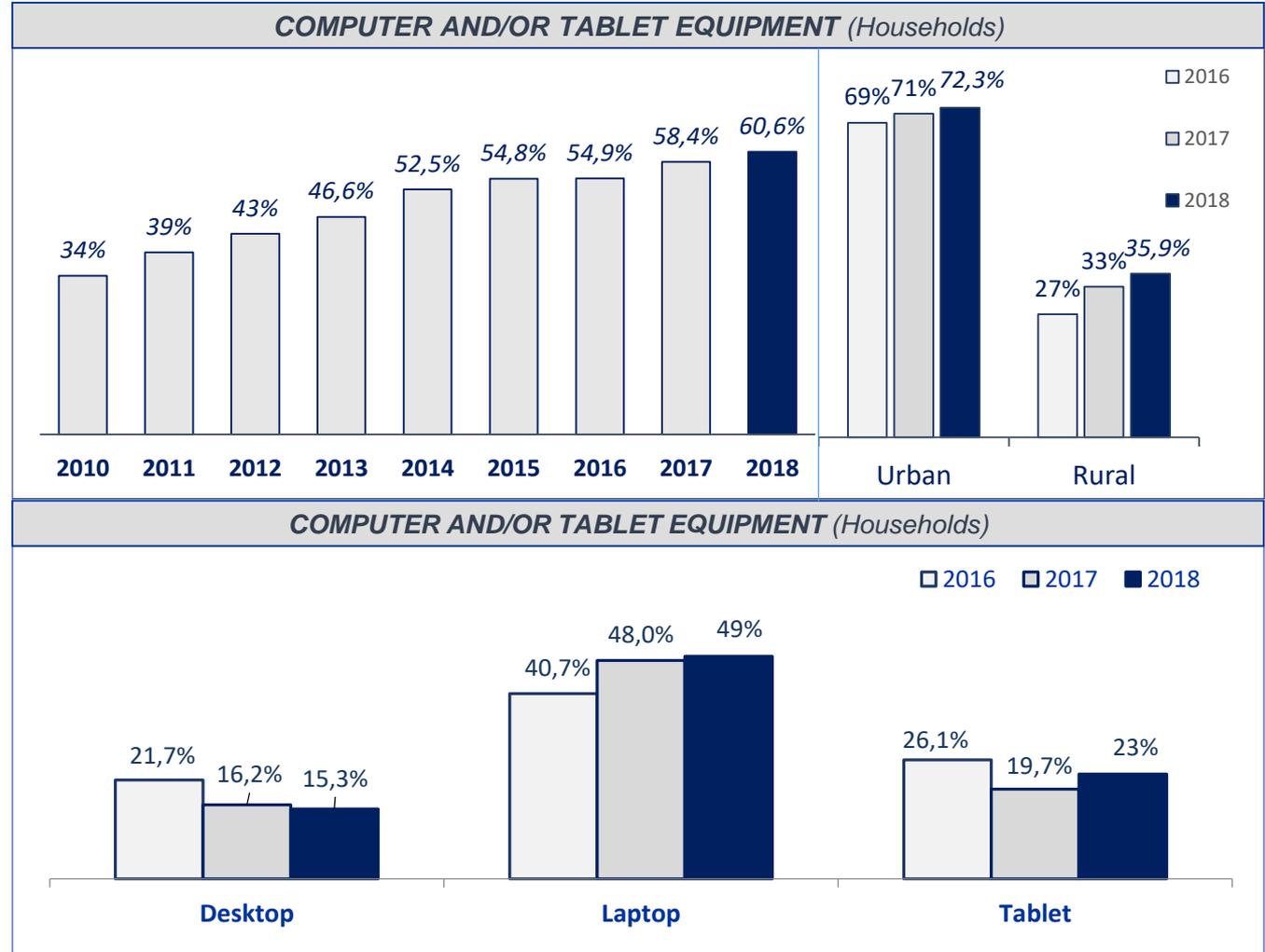
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The household equipment with computer* is increasing and reaches 60.6%

Tablet equipment showed an uptrend after a decline in 2017 (23% vs 19.7%).



* Computer : including desktop, laptop and tablet.

Multi-equipment in computer shows that about 4 out of 10 households own more than one PC or Tablet.

Nearly one out of five households is equipped with three or more PC or Tablet.

The PC and the tablet are part and of the basic equipment of Moroccan households where half of the urban households have more than one device.

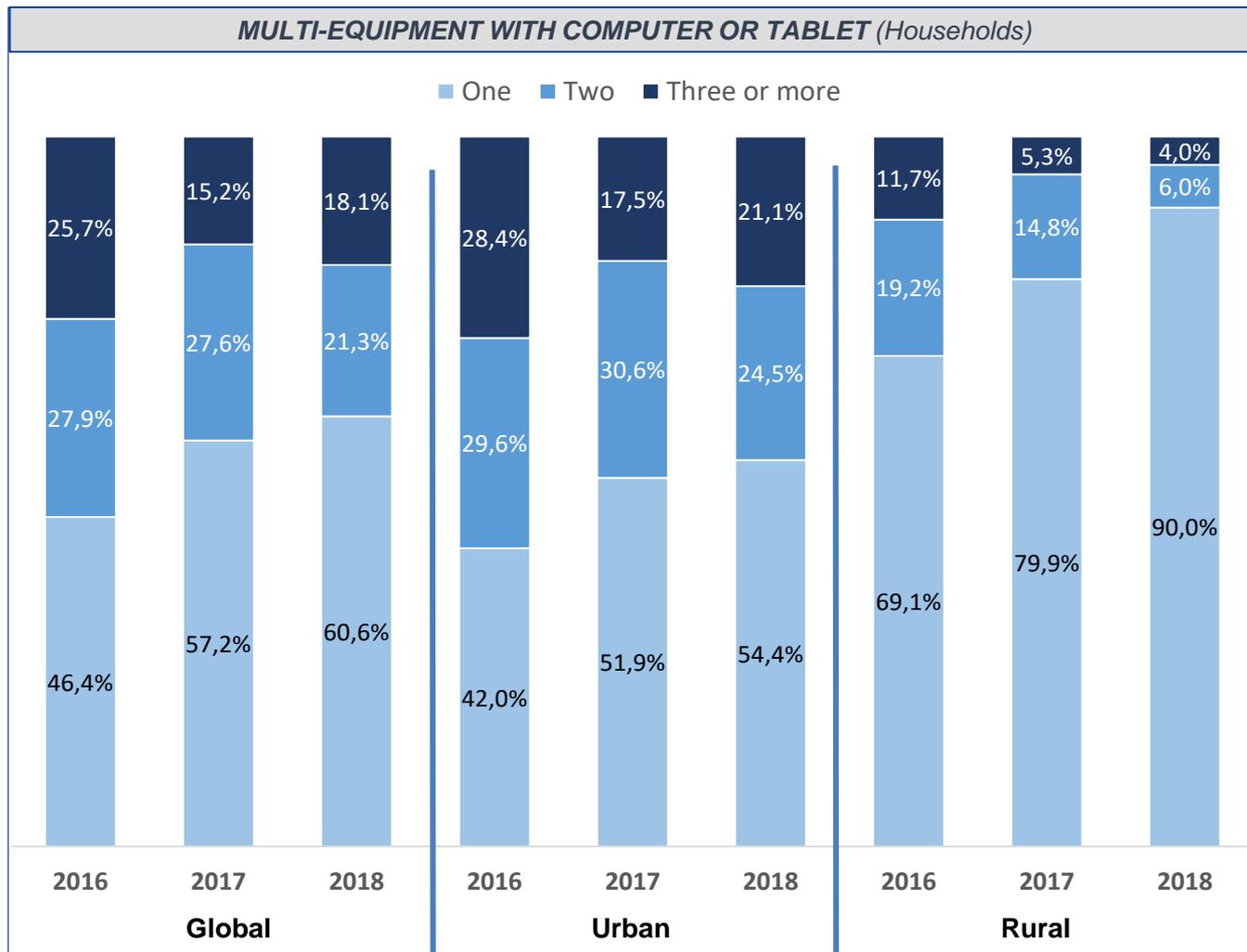


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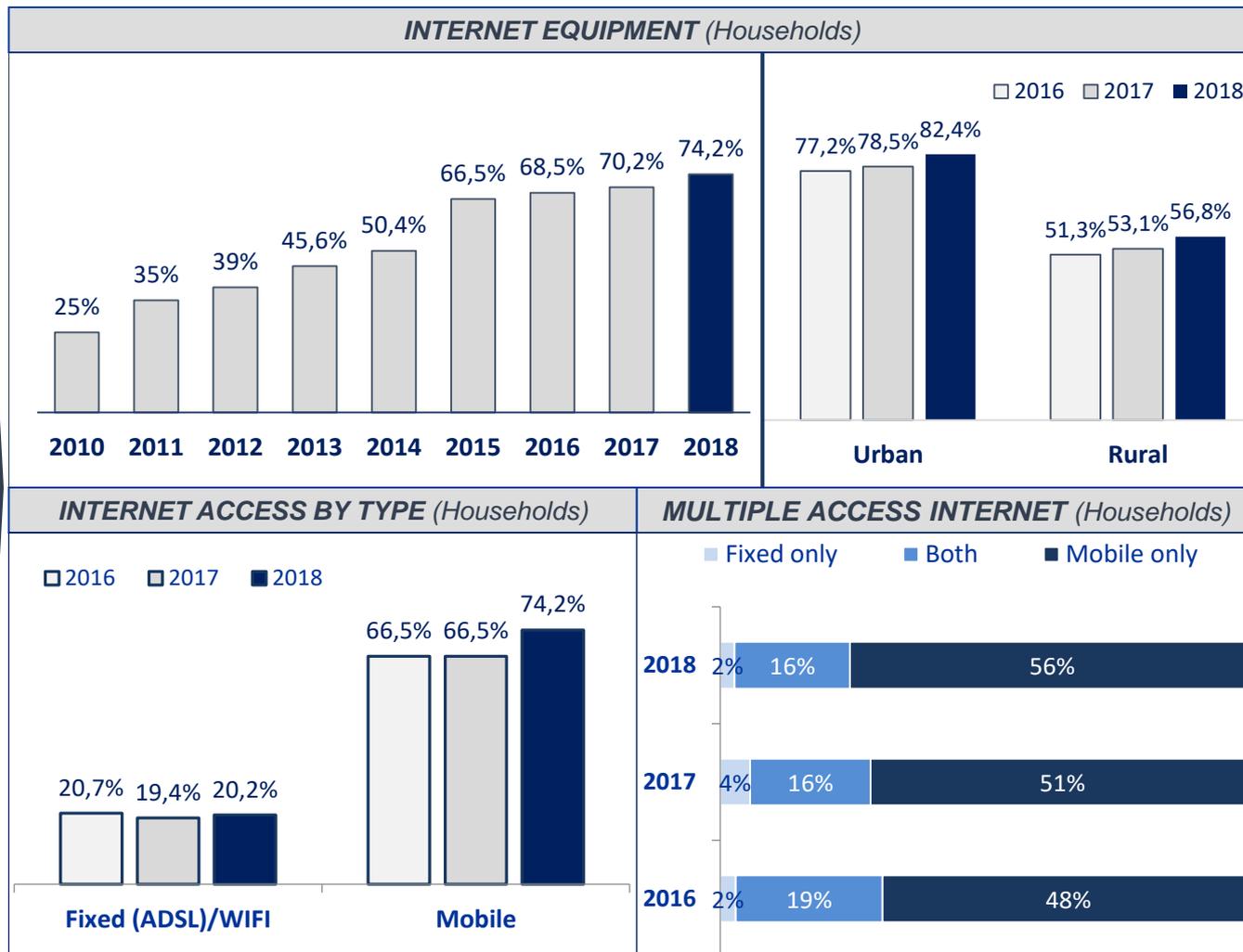
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8 out of 10 households have Internet access in urban areas.

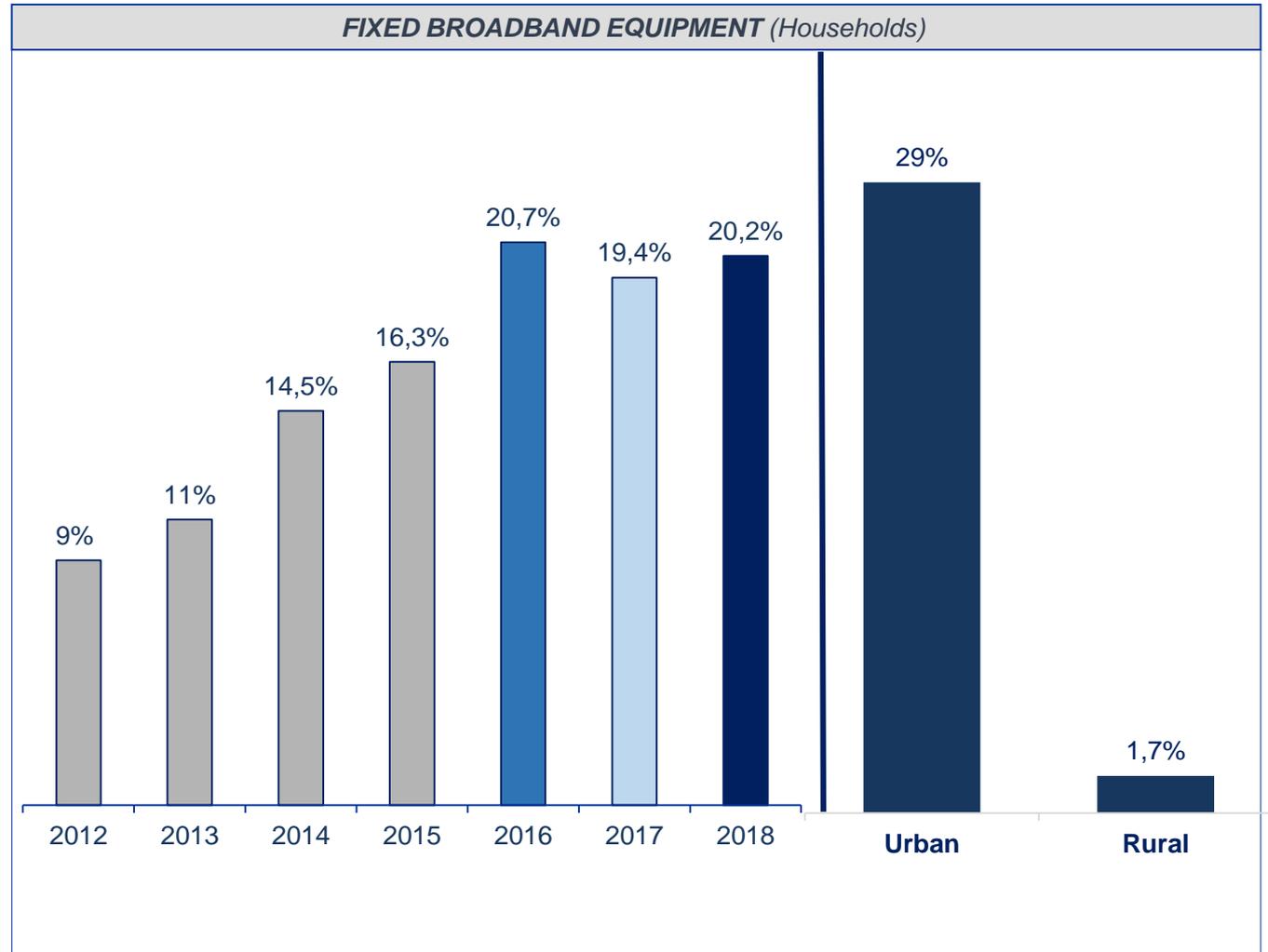
More than 1 out of 2 households in rural areas are equipped with Internet access.

In 8 years, the household equipment with Internet access has been multiplied by 3.



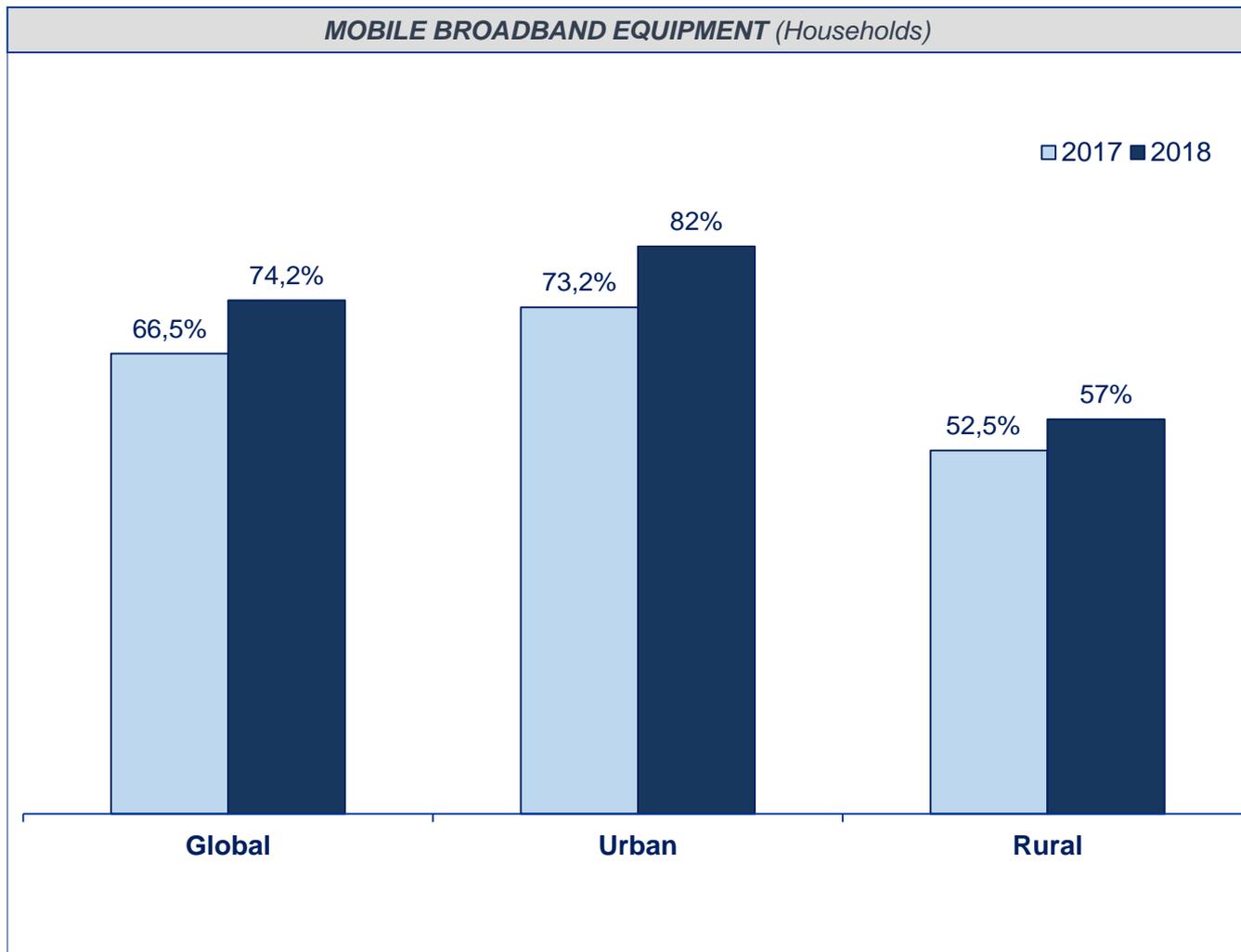
Fixed Broadband is growing slightly within households in 2018

Three out of ten households are equipped with Fixed Broadband



Three out of four households are equipped with mobile broadband, almost all of them through a mobile phone

One out of two rural households accesses to Internet via mobile phone



The motivations of households equipment with Internet access are mainly social media and news

Entertainment and news are the main motivations for household Internet equipment, followed by professional and educational uses.

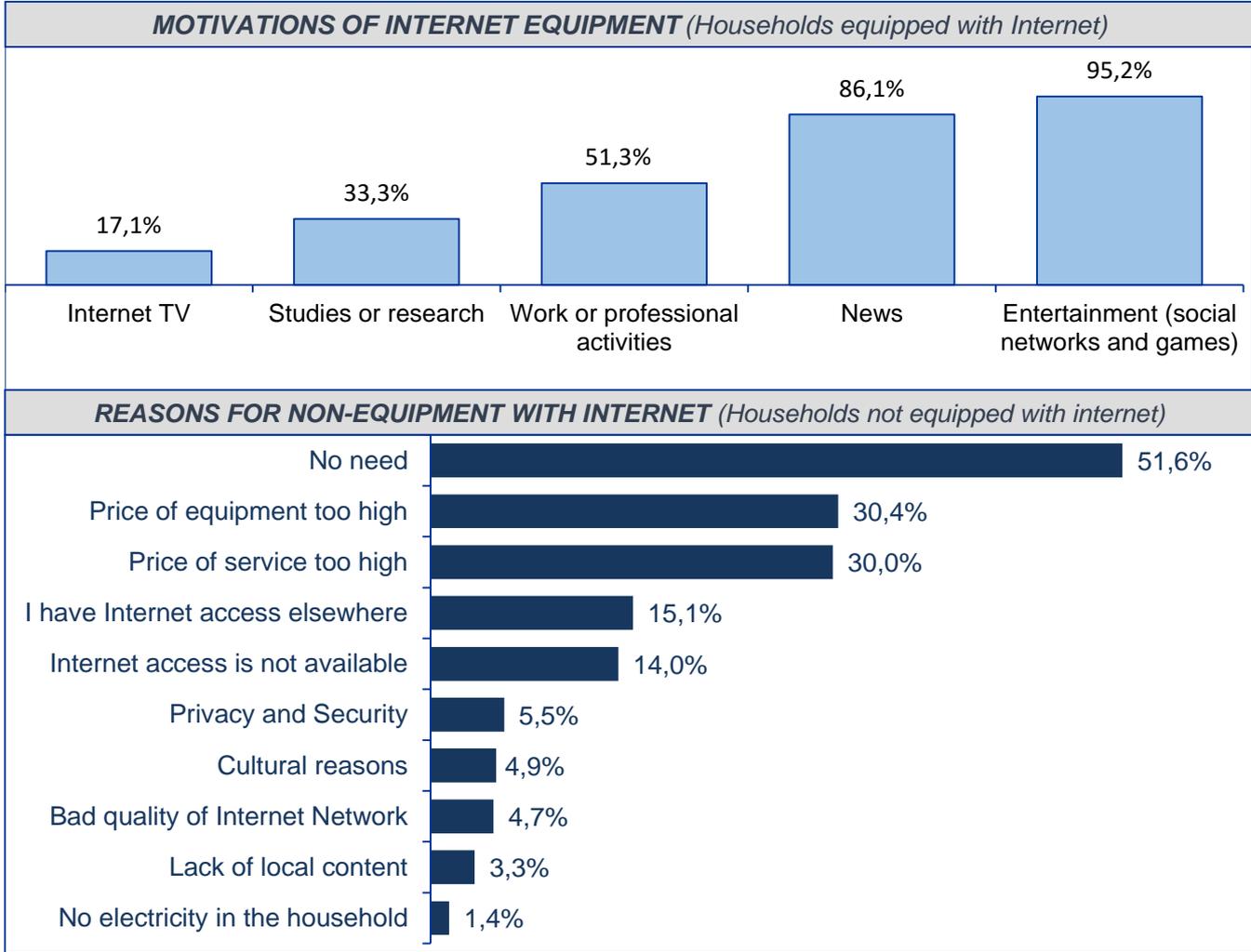


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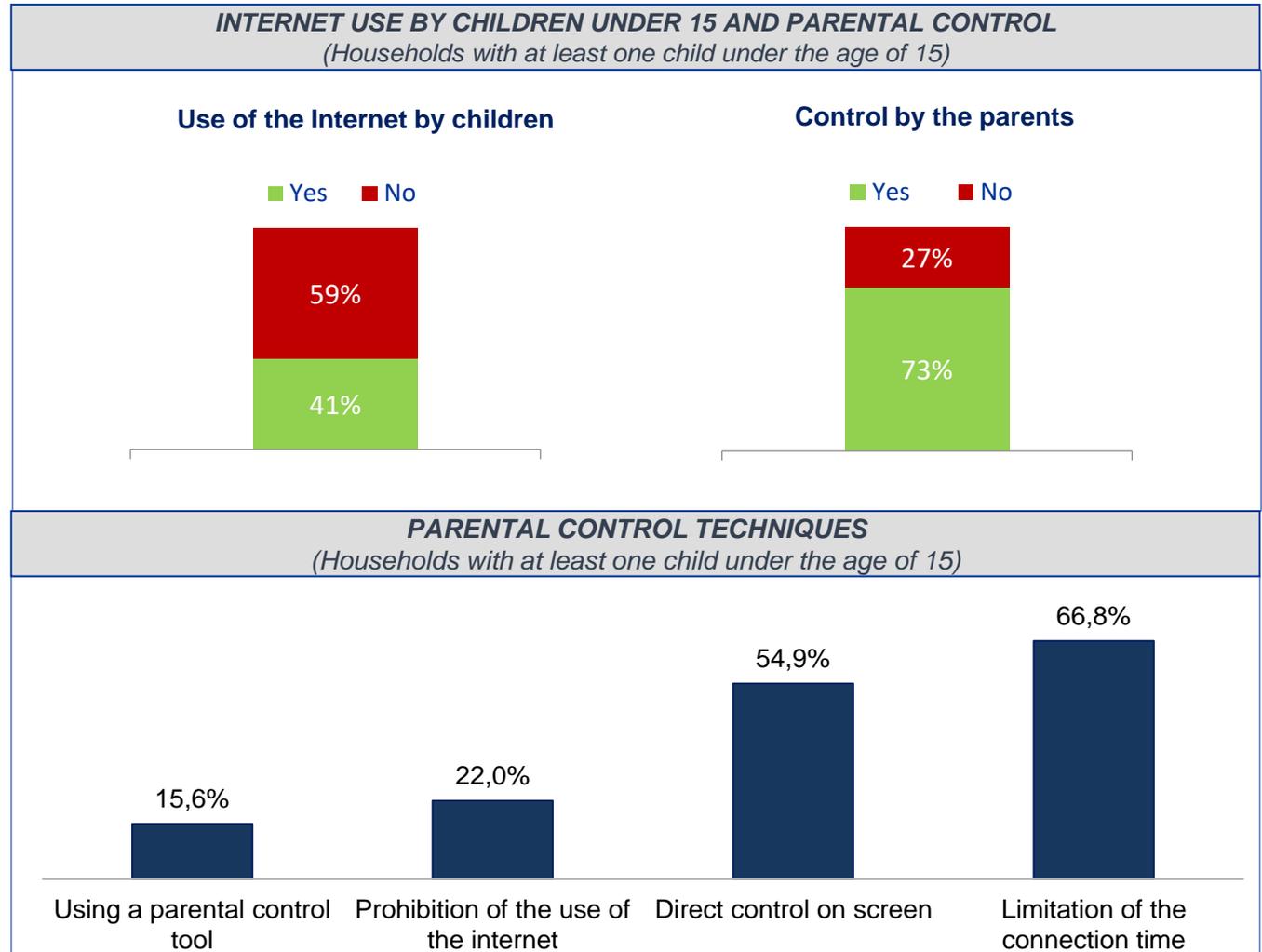
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Children use the Internet in six out of ten households

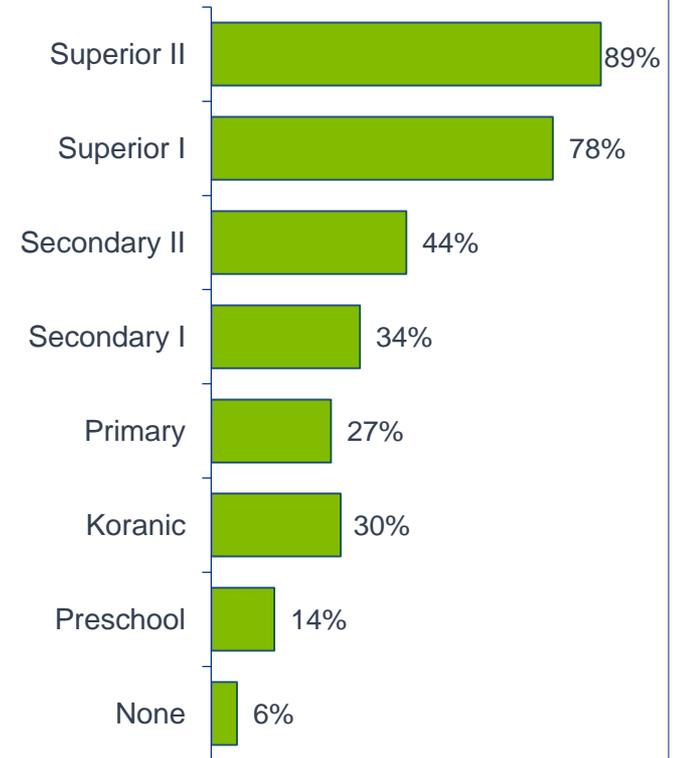
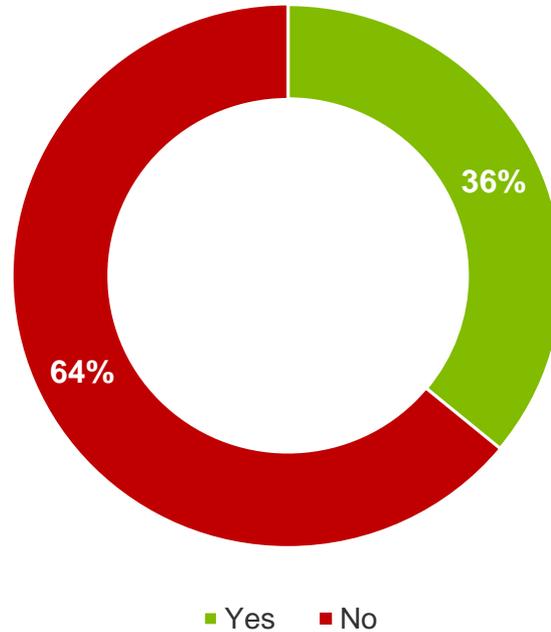
- Parental control is practiced in three quarters of the households surveyed.
- Time limitation of the connection represents 2/3 of ways of controls followed by direct control on the screen in one out of two cases.



One out of three households report that parents know how to guide children's Internet use. The level of competence depends on the educational level of the parents

- The ability of control of Children's Internet use is closely linked to the educational level of parents.
- The higher the level of education, the more likely individuals are to feel competent to guide the use of their children.

PARENT'S COMPETENCE TO INFLUENCE THE USE OF INTERNET BY THEIR CHILDREN
(Households with at least one child under the age of 15)



The households surveyed consider that the responsibility for educating children to use the Internet lies on the school.

For nearly two-thirds of households, the Internet is positive for their children.

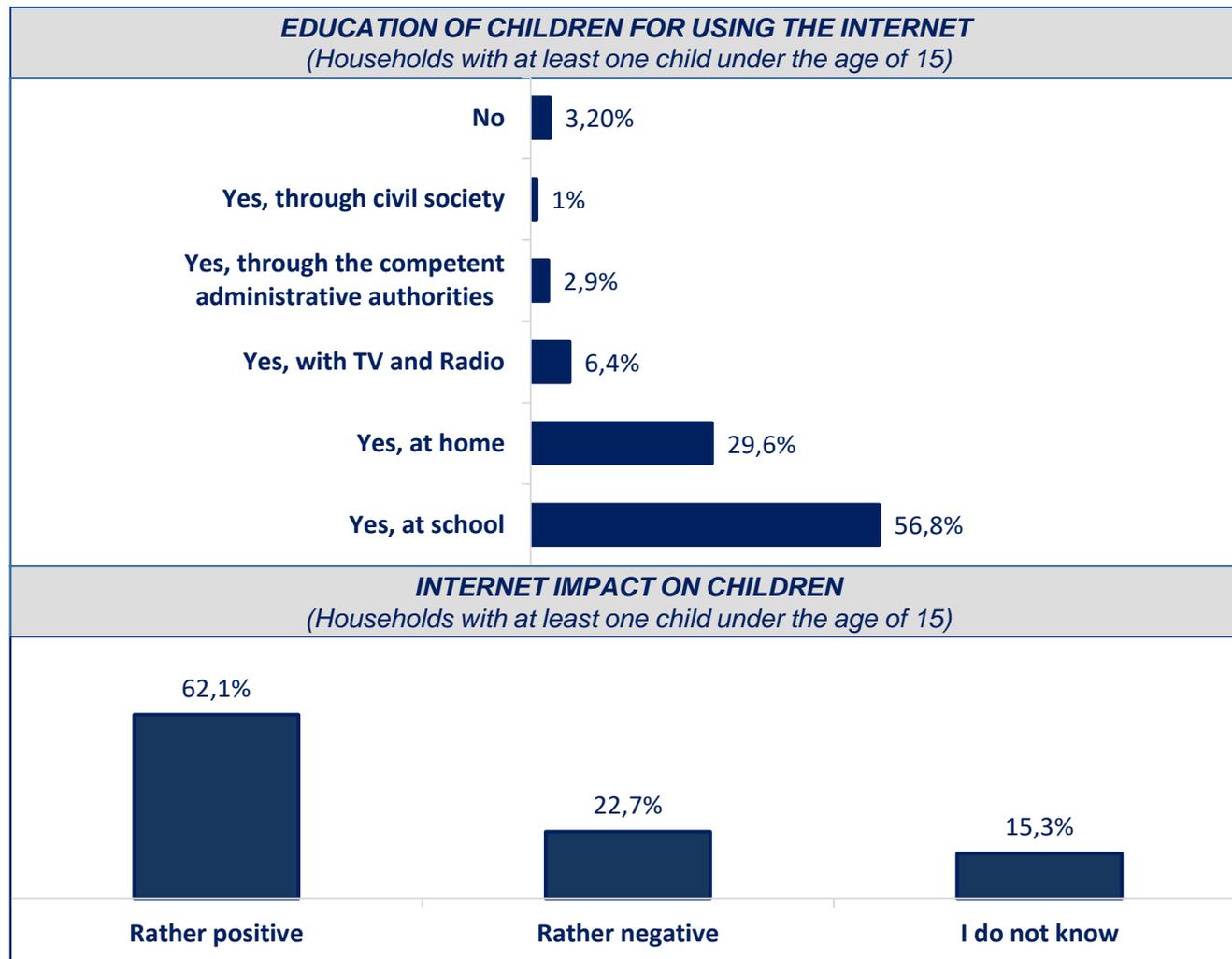


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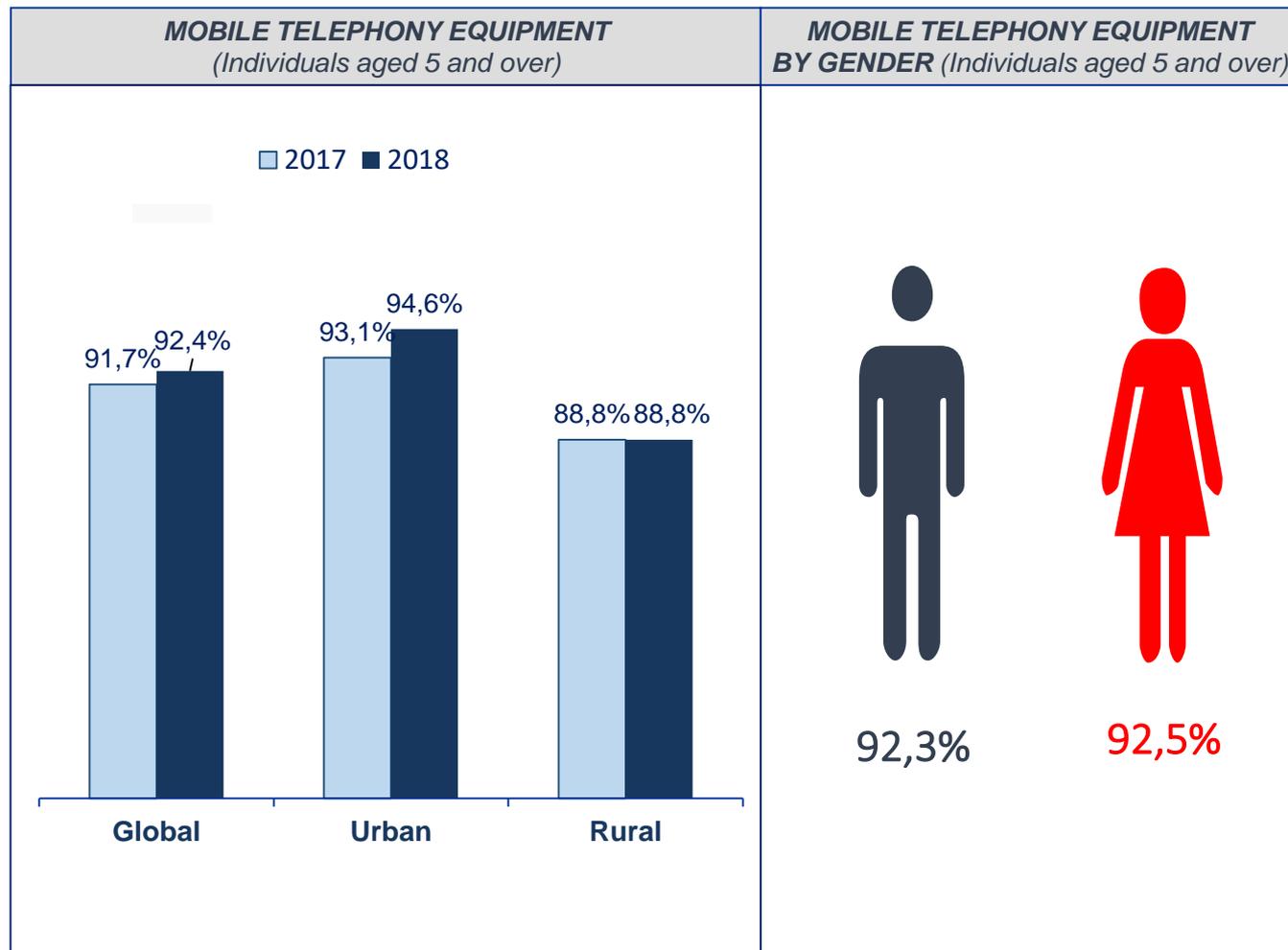
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The growth rate of mobile phone equipment exceeds the growth rate of population over 5 years old.

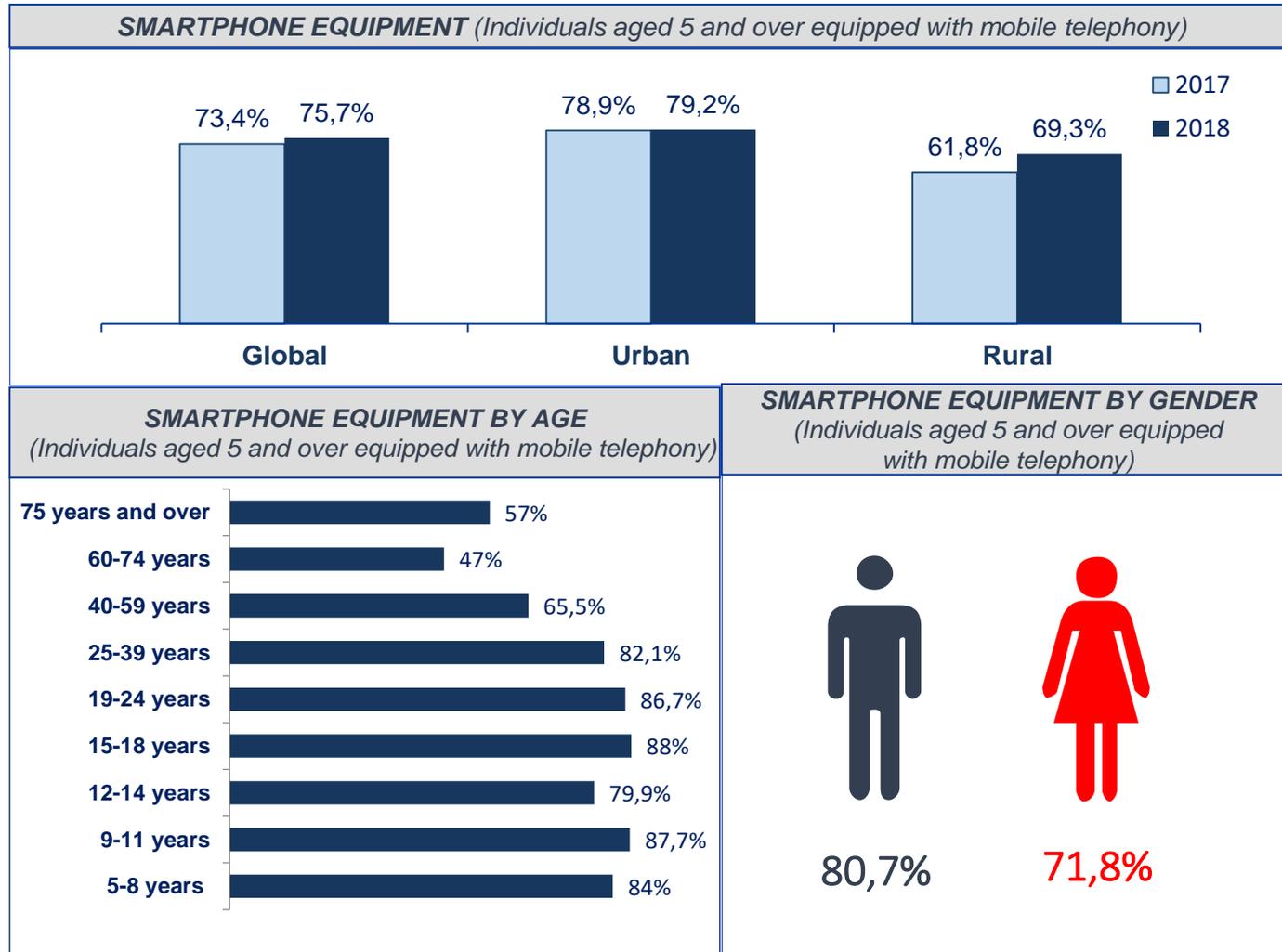
- In 2018, 29.7 million of the population aged 5 and over are equipped with a mobile phone, compared with 29 million in 2017.
- Thus, nearly 690.897 individuals are been equipped a first time with mobile phone.



The smartphone penetration rate is growing faster (3.1%) than the mobile phone (2.3%)

- Among the 29.7 million equipped with a mobile phone, nearly 22.5 million hold a smartphone.

- The number of smartphones around is 23.4 millions.



A big interest for mobile applications in both urban and rural areas

- Mobile applications are particularly used by age groups between 15 and 39 years old.
- Young people between the ages of 12 and 24 are above the overall average.

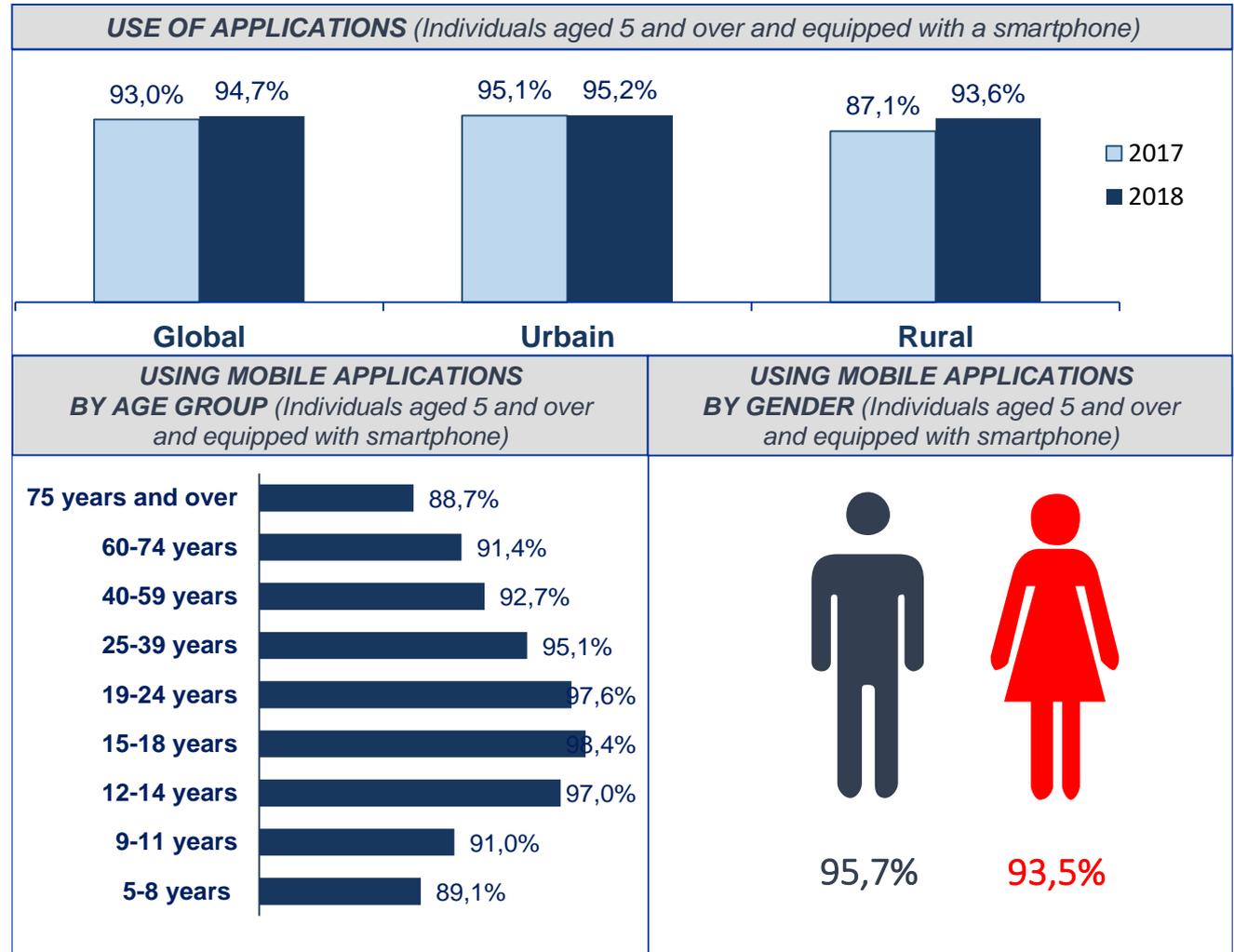


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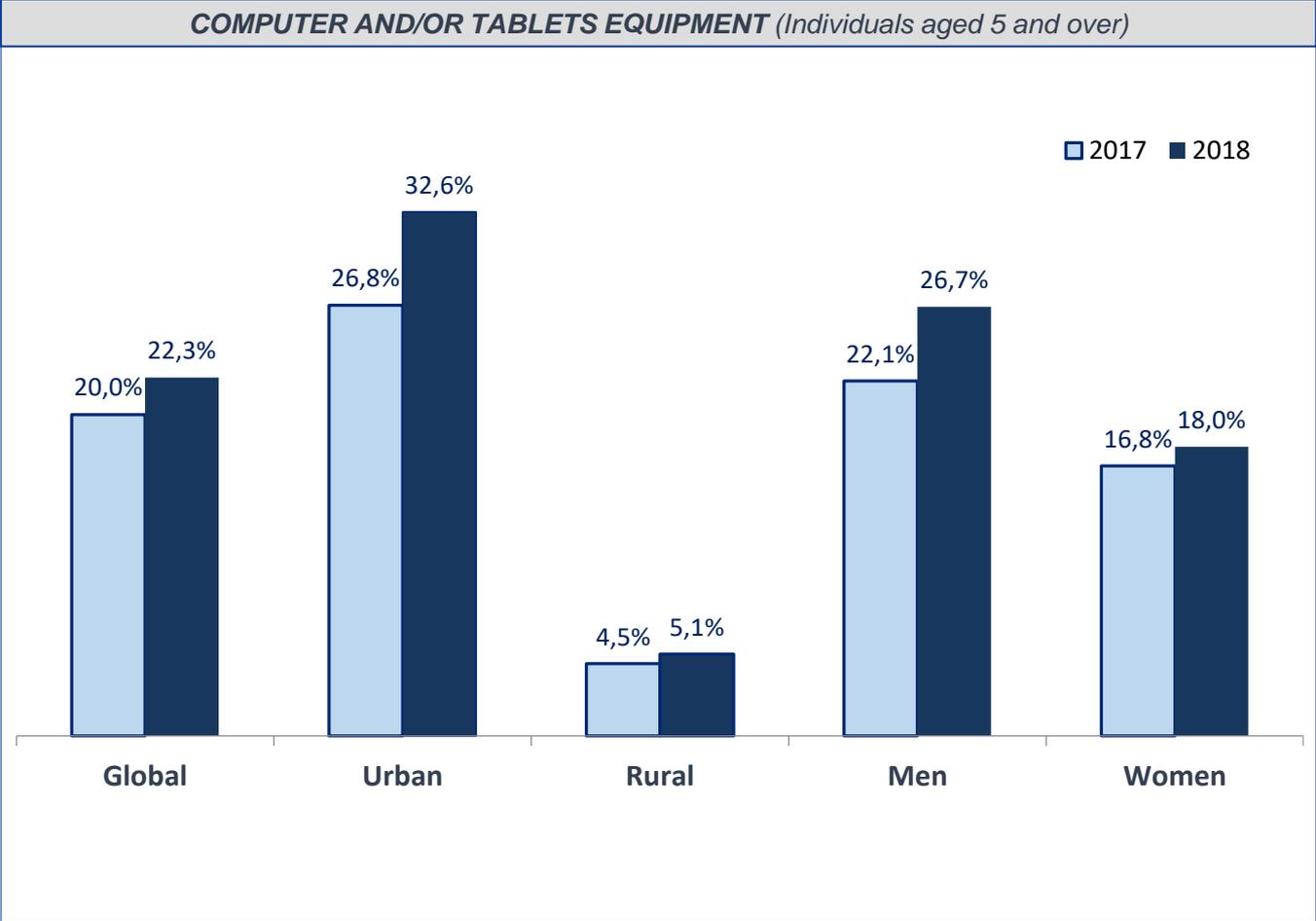
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22.3% of individuals own a computer or tablet

A growth in computer equipment within individuals (2 points) especially in urban areas and among men.



The computer equipment within individuals is correlated with their ages and levels of education

Young people aged 9 to 24 are the most equipped with computers.

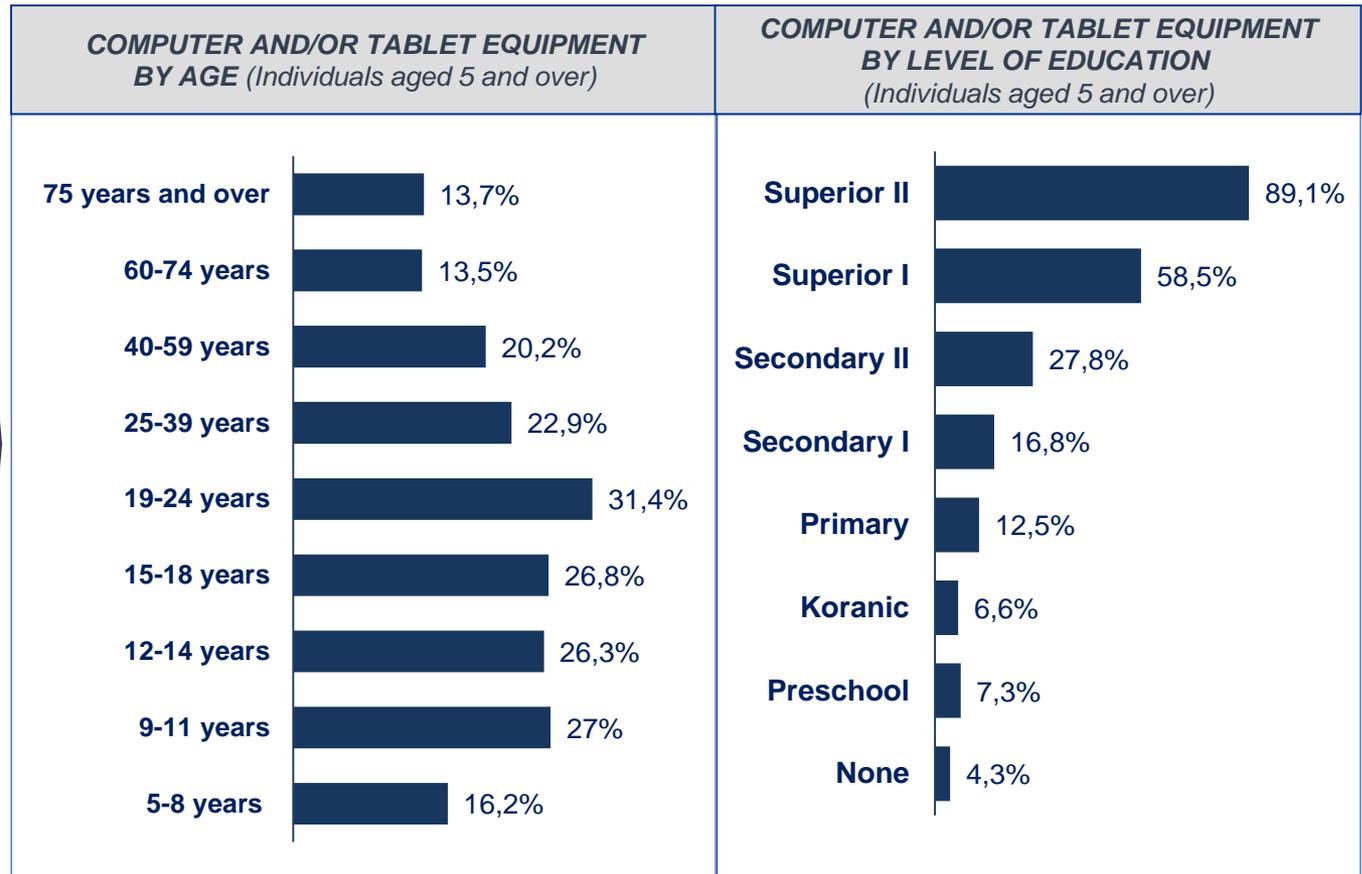


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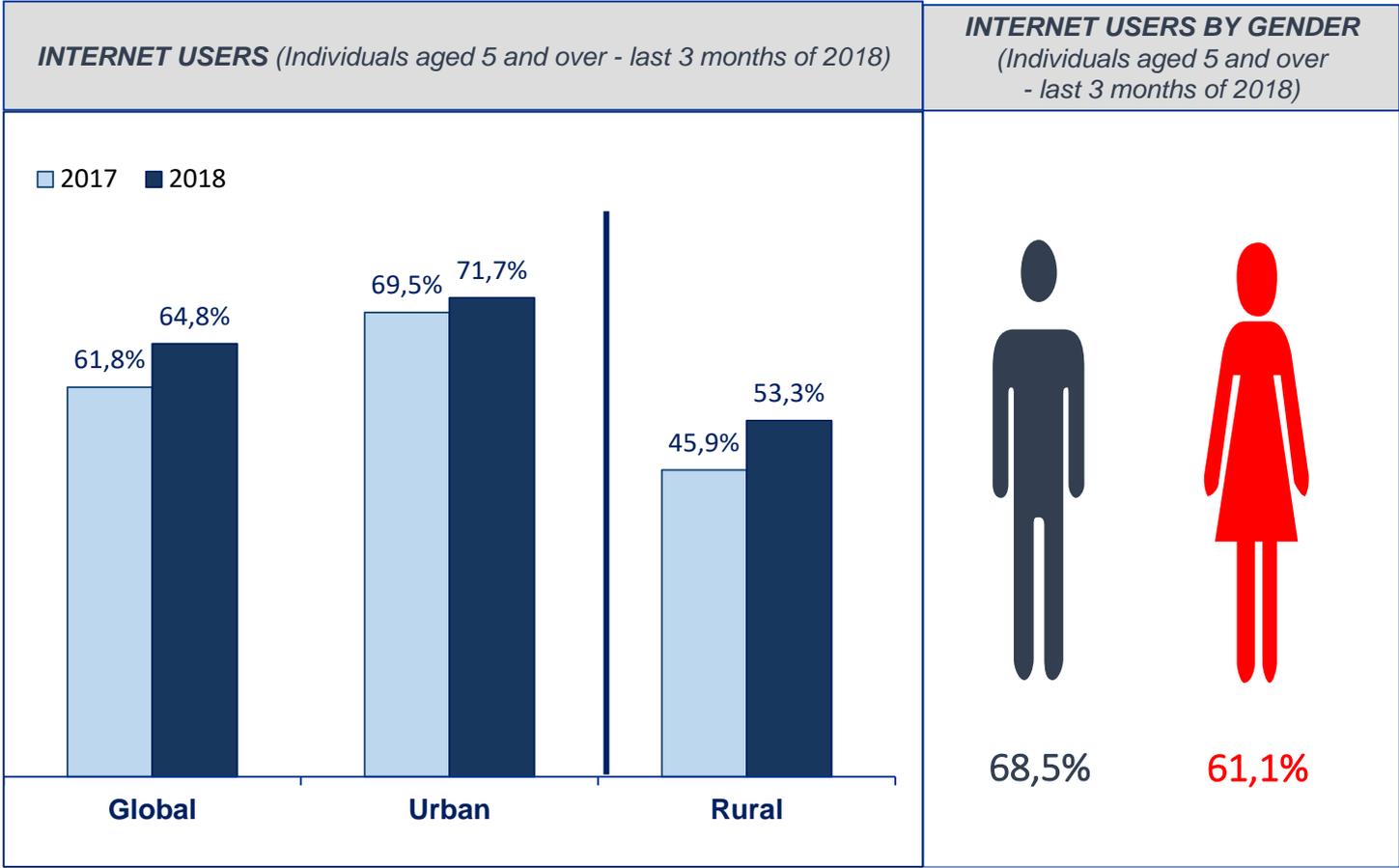
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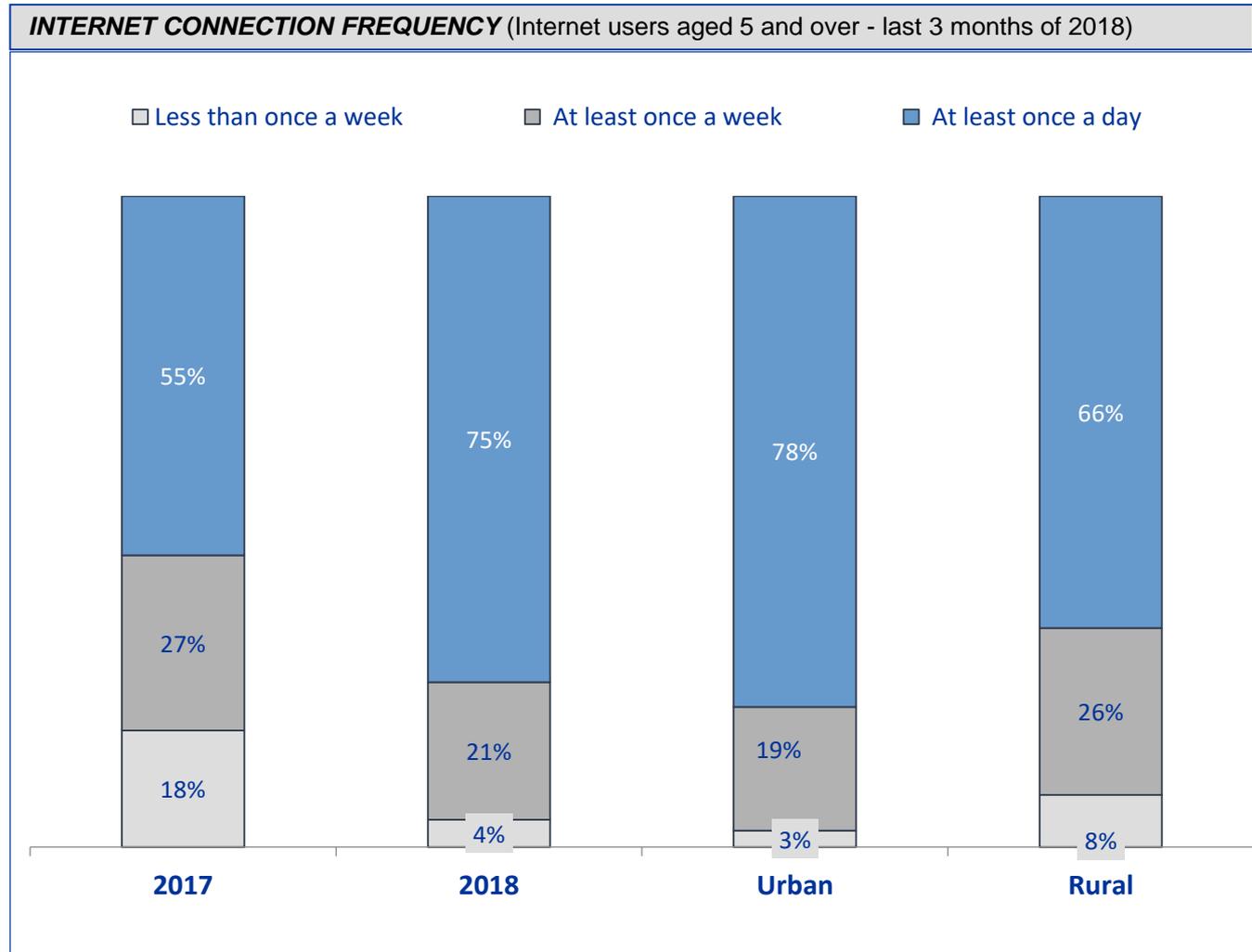
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The Internet penetration rate has increased significantly by 3 points.
An increase of 1.3 million of Internet users.



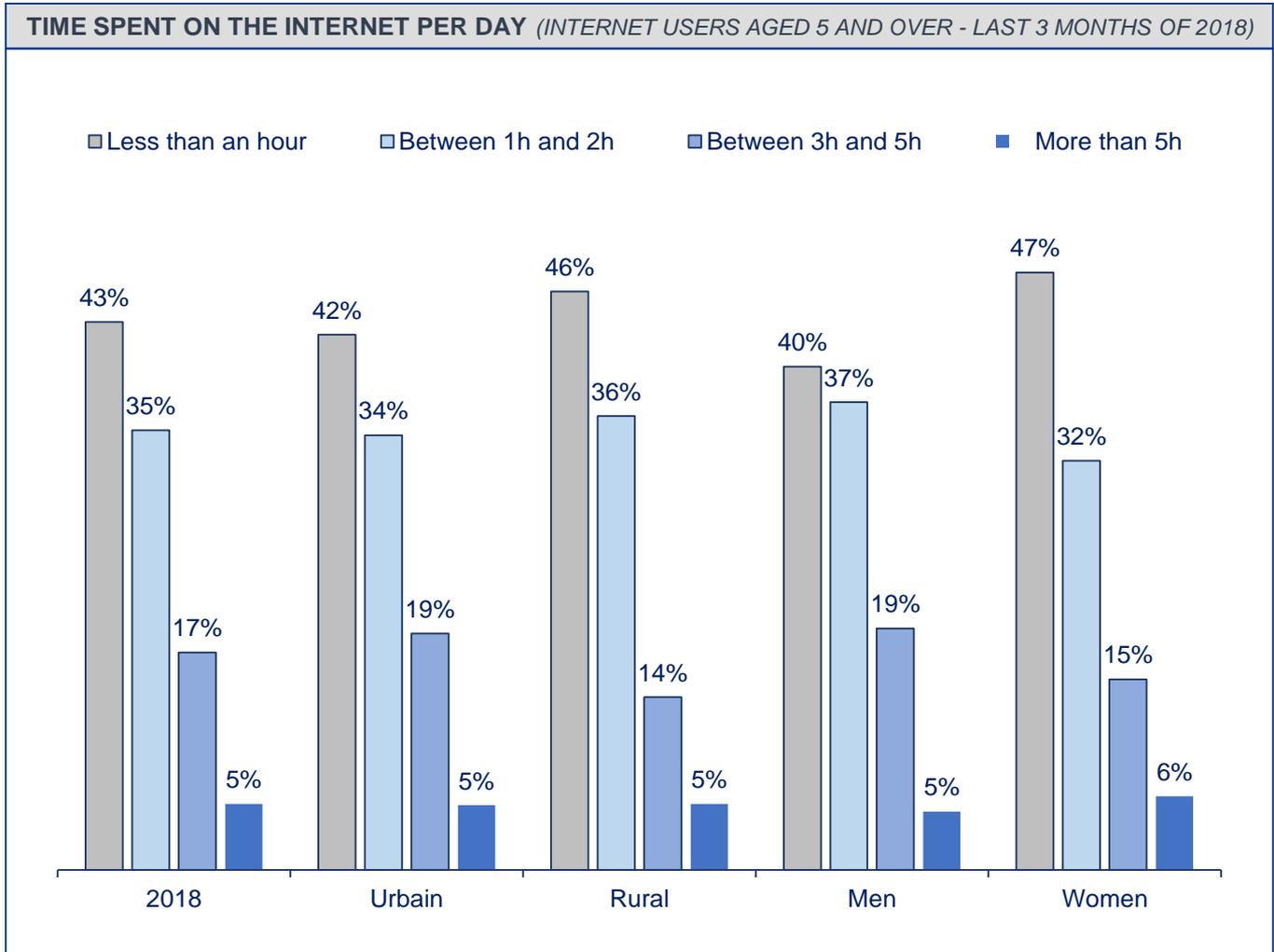
Three out of four Internet users access to Internet at least once a day

At the national level, daily connections account for 75% of the population against 55% a year earlier.



Nearly six out of ten of Internet users spend more than one hour a day on the Internet

- Internet paces the lives of Internet users both urban and rural.
- The most adept, those who spend more than 3 hours on the Internet (22%) are urban men.



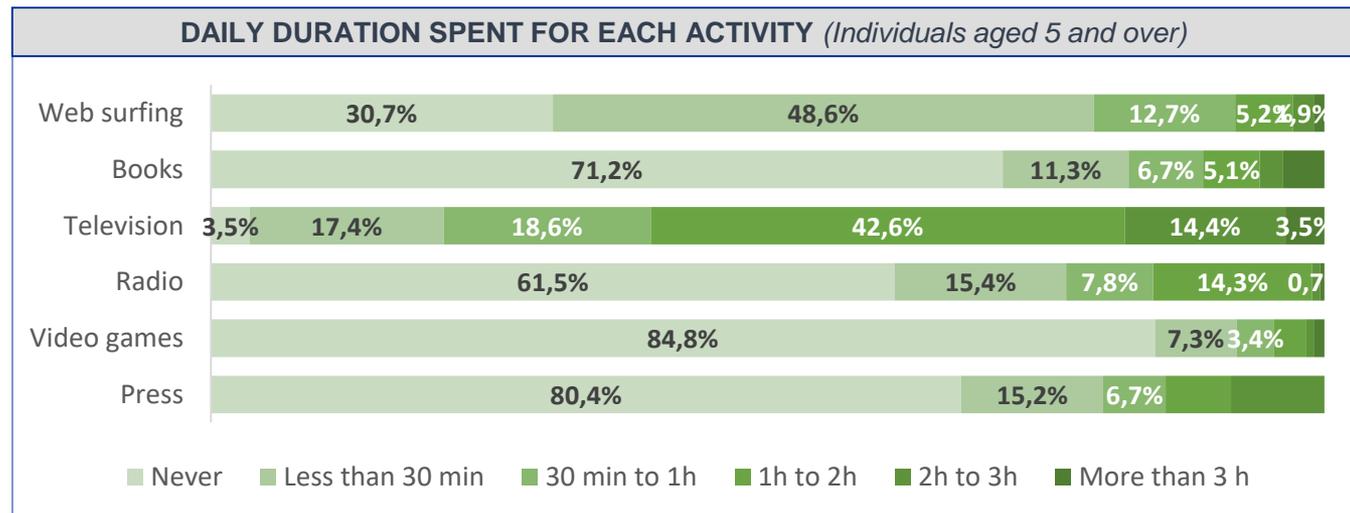
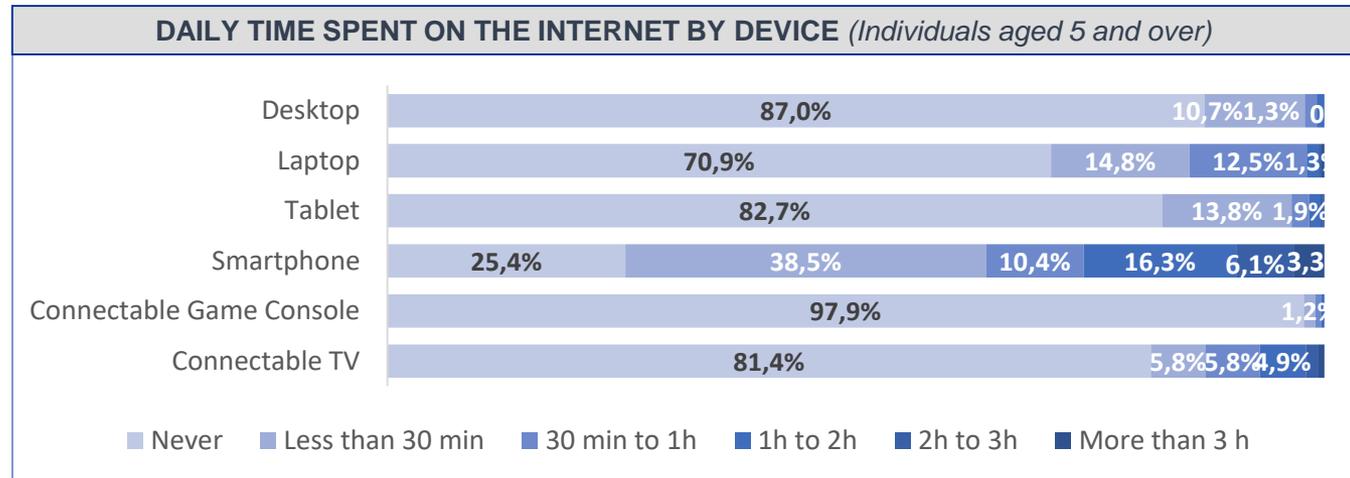
The smartphone dethrones all other media in terms of daily usage time.

75% spend more than 30 minutes a day.

- The distribution of time spent by support shows that Moroccans favor the smartphone.

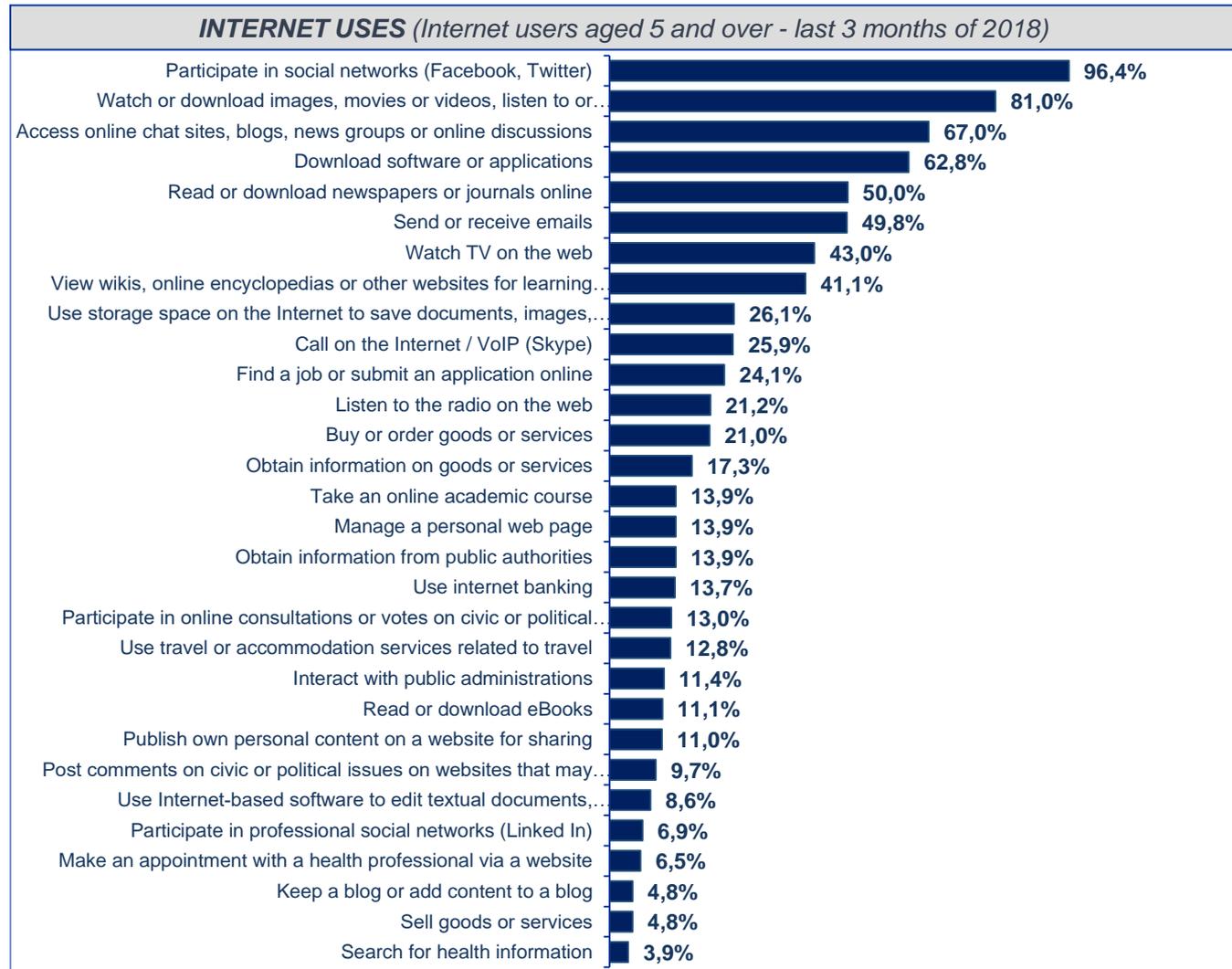
- Moroccans spend 1 to 2 hours a day on the following activities:

- TV : 42,6%
- Radio : 14%
- Press : 7%
- Reading : 5,1%



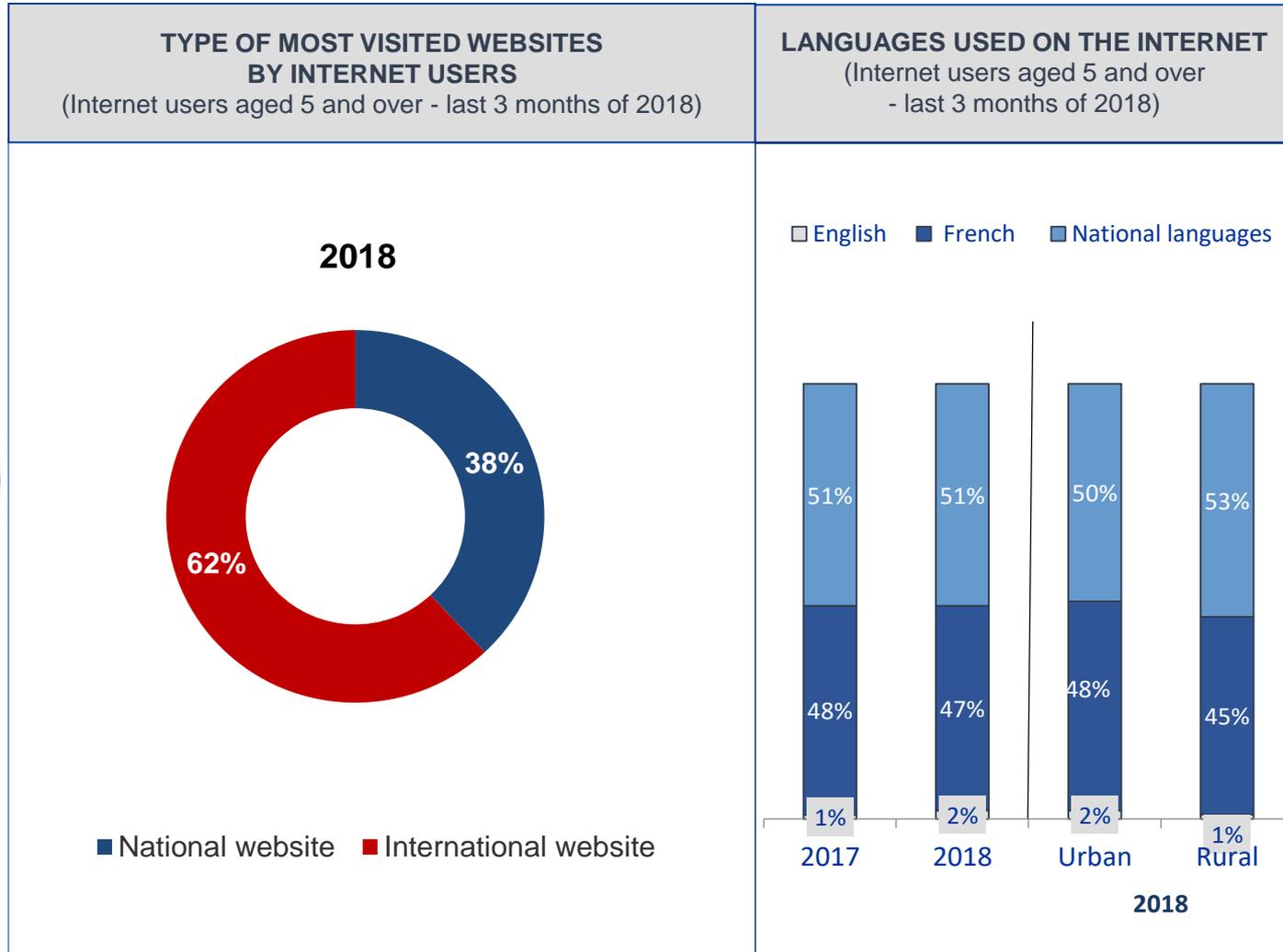
The Internet uses ranking has not changed much from 2017 to 2018

- Usage rates have changed. Social networks are still at the top of the rankings as their access is quite easy and does not require special skills.
- Social networks use continues to evolve.



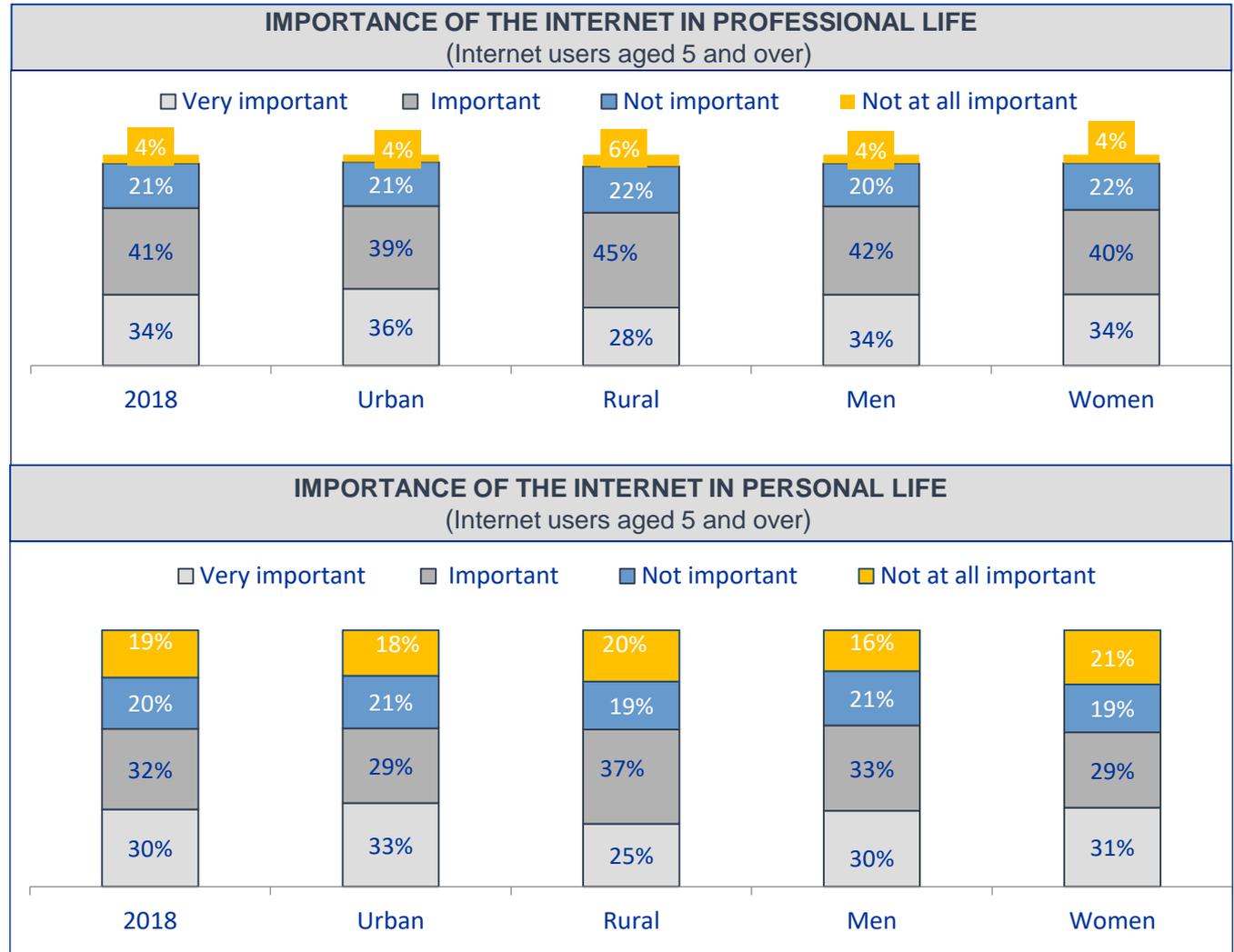
National languages and French are the most used on the Internet

- Web content in French and in national languages is the favorite for Moroccans.
- Access to national sites has increased to 38% in 2018 instead of 16% in 2017.



For a large part of the population, the Internet is of prime importance

Three out of four Internet users recognize the importance of the Internet in their professional lives against four out of five Internet users who believe that the Internet is important in their personal lives.



Internet users' perceptions and attitudes towards the Internet are mixed: positive and negative depending on the purpose

□ The risks (negative aspects) most felt by Internet users are those related to:

- Lack of credibility of information (67%)
- A threat to personal data (54%).
- Incitement to violence (44%).
- A distraction from work or studies (54%).

□ The strongest positive appreciations are :

- Maintaining the social relationship (88%).
- Improving skills (71%)

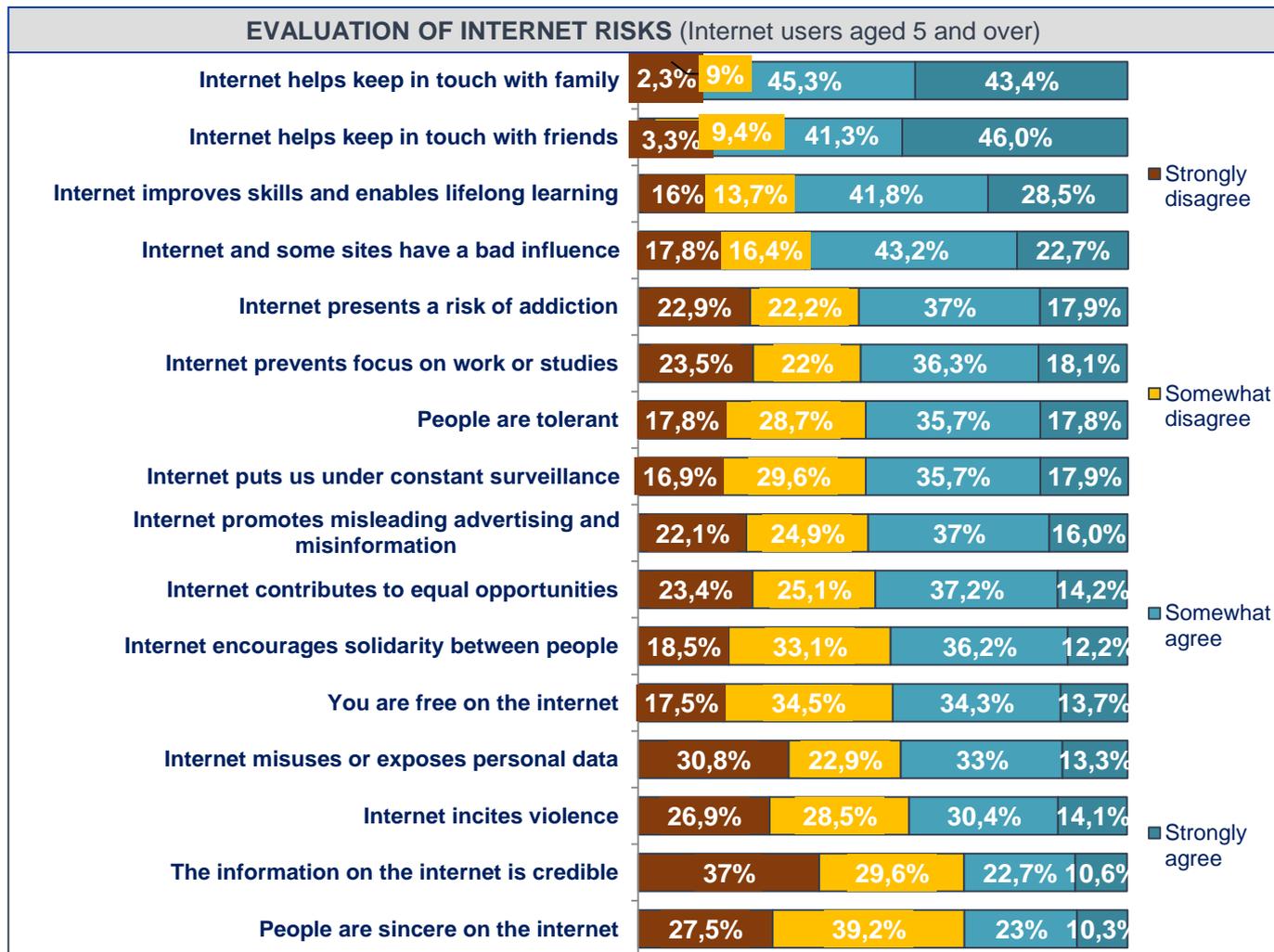


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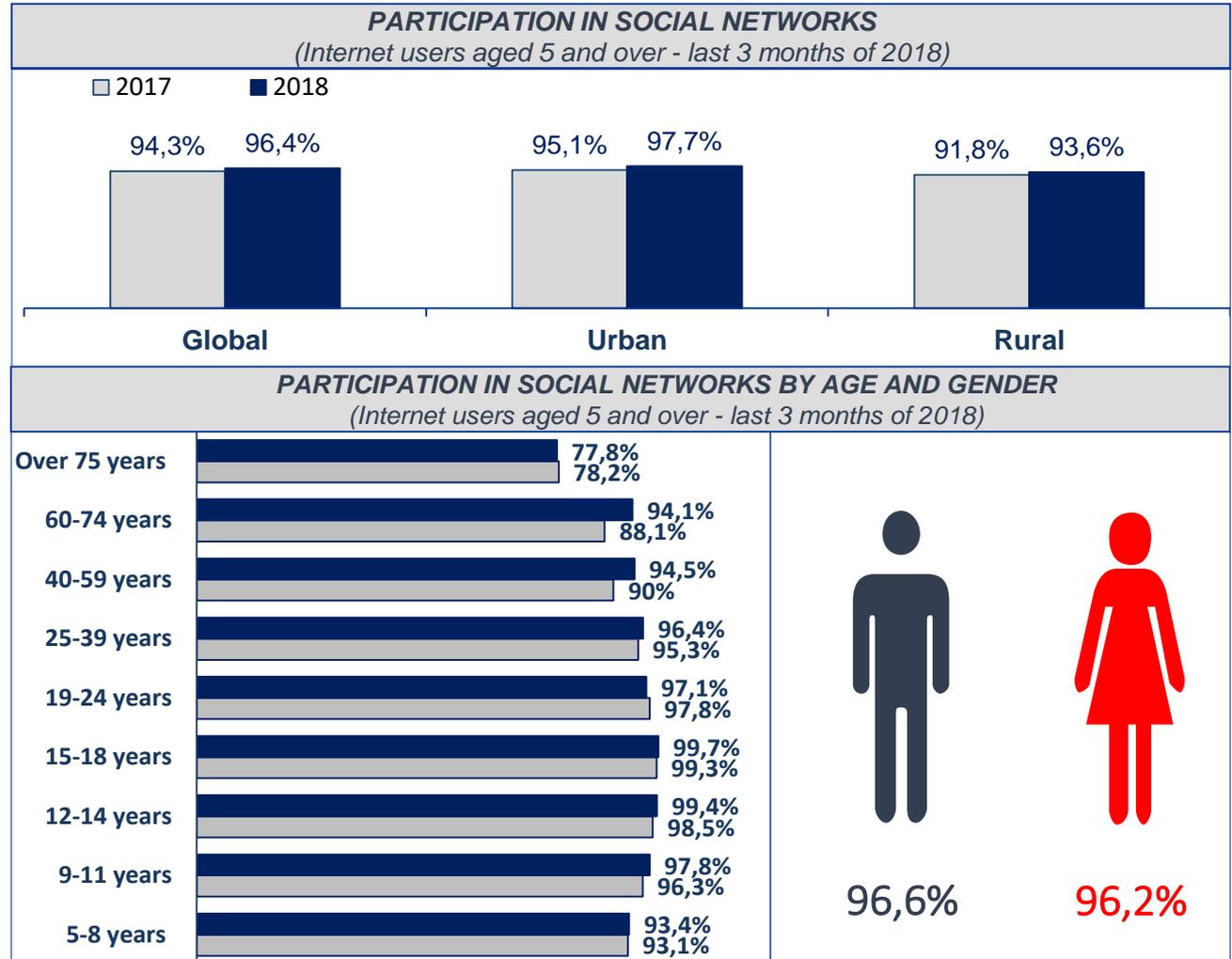
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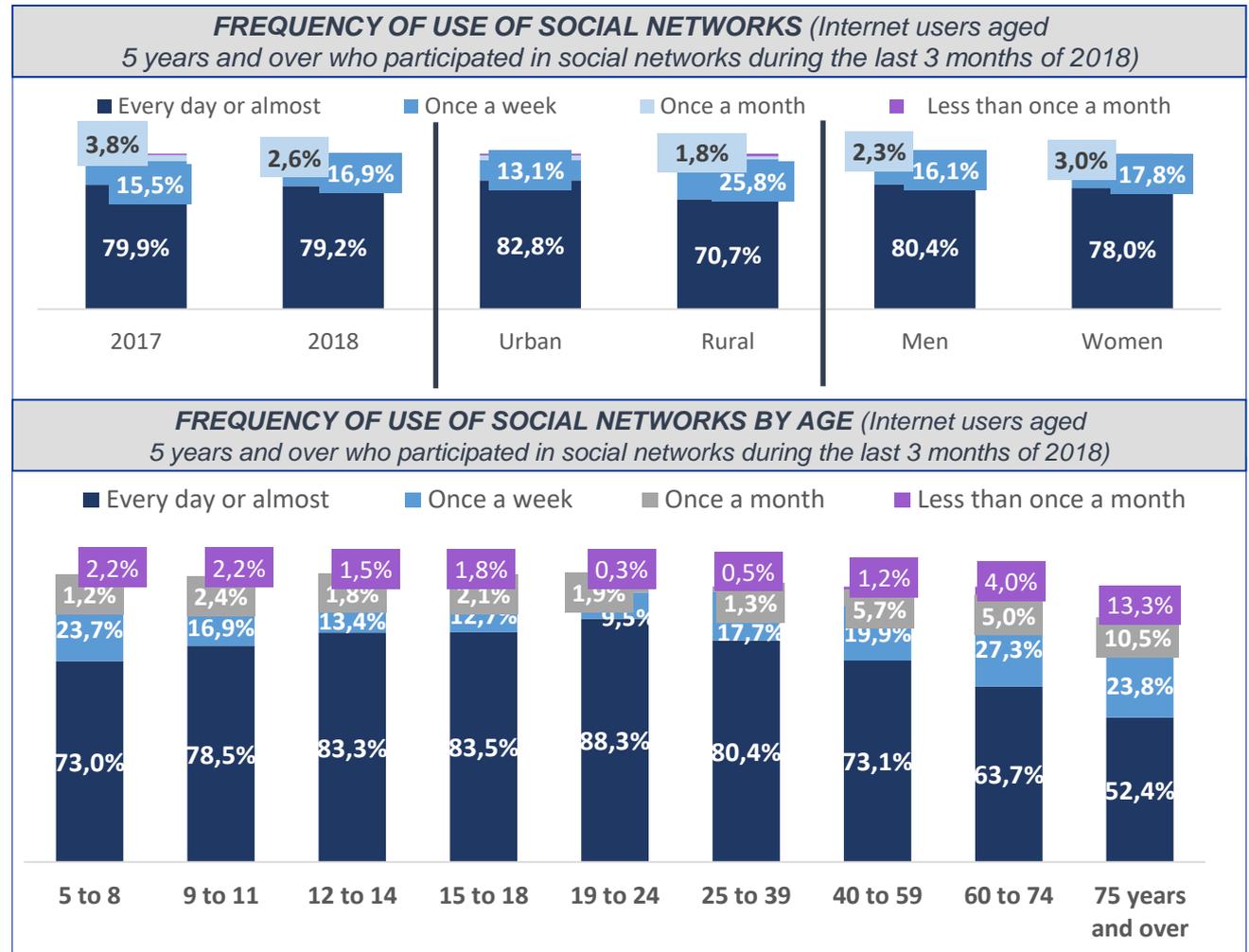
Participation to social networks is evolving and becoming more widespread in all areas

- The so-called Z generation (12-18 years) have a level of social networks participation close to 100%.
- Social networks are widely used regardless of age and gender.



Nearly eight out of ten Internet users use social networks daily

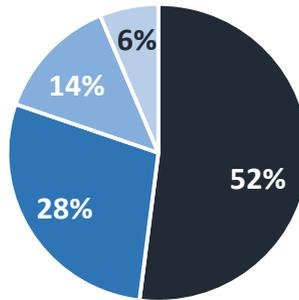
Young people between the ages of 12 and 24 are the ones who massively access social networks on a daily basis.



Half of Internet users spend more that one hour per day on social networks

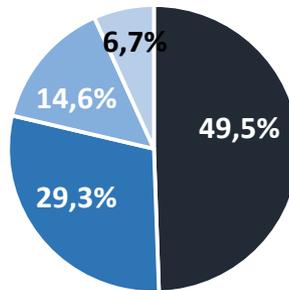
DURATION OF USE OF SOCIAL NETWORKS (Internet users aged 5 and over having participated to social networks during the last 3 months of 2018)

Duration of daily use of social networks

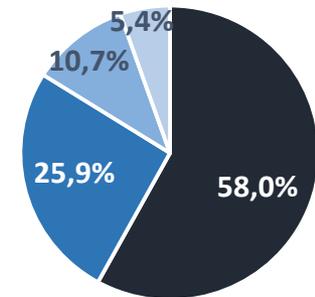


- Less than one hour
- 1 to 2 hours
- 2 to 4 hours
- More than 4 hours

Duration of use of social networks in urban area



Duration of use of social networks in rural area



Almost half of Internet users spend more than one hour a day on social networks.

WhatsApp is at the top of the list of social networks

The top 10 of social networks in the world

- **Facebook** : 2,3 billion
- **Youtube** : 1,9 billion
- **What'sApp** : 1,5 billion
- **FB Messenger** : 1,3 billion
- **We chat** : 1,1 billion
- **Instagram** : 1 billion
- **QQ** : 803 millions
- **Qzone** : 531 millions
- **Tik Tok** : 500 millions
- **Sina Weibo** : 446 millions

Source : Hoot Suite & We are social (Jan. 2019)

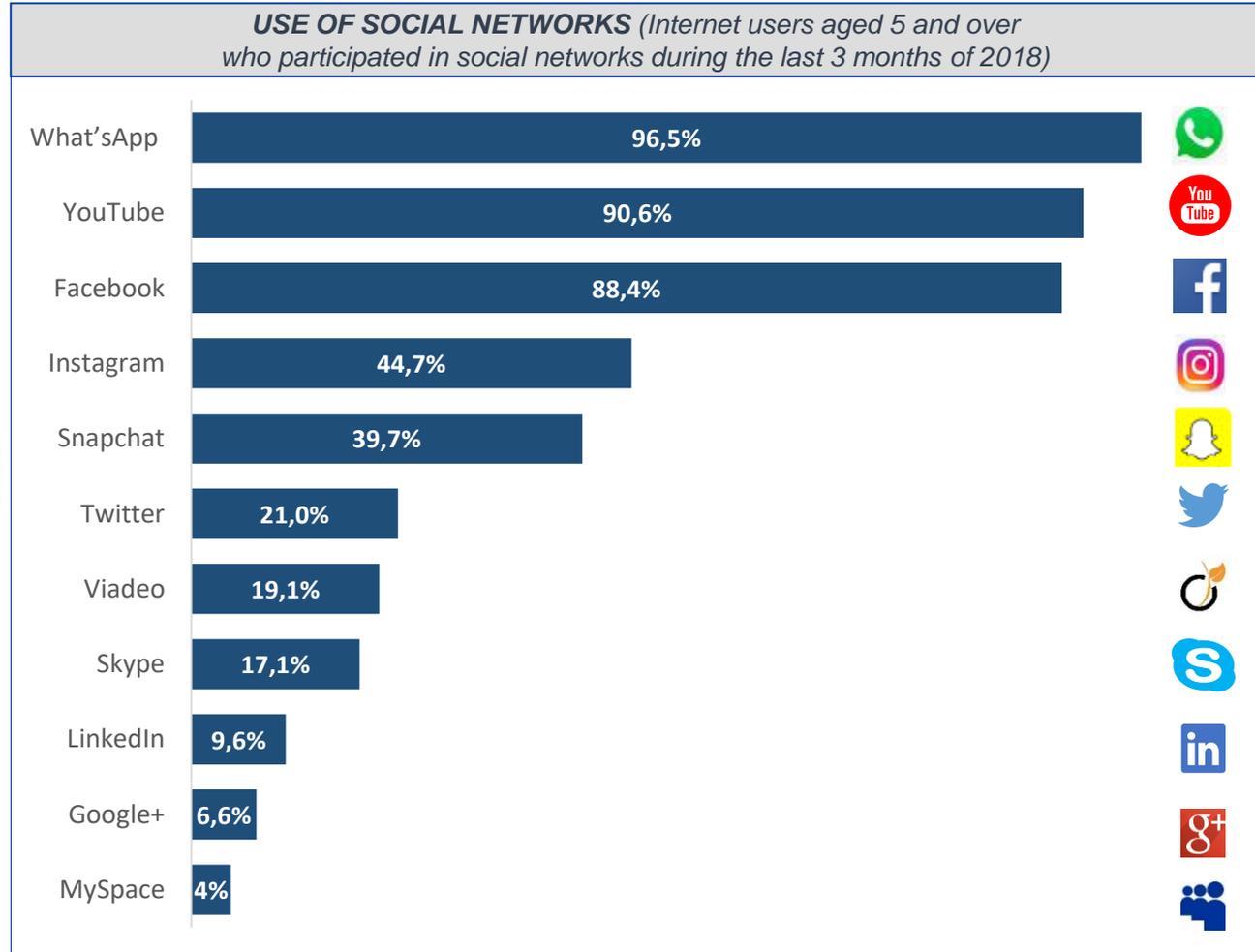


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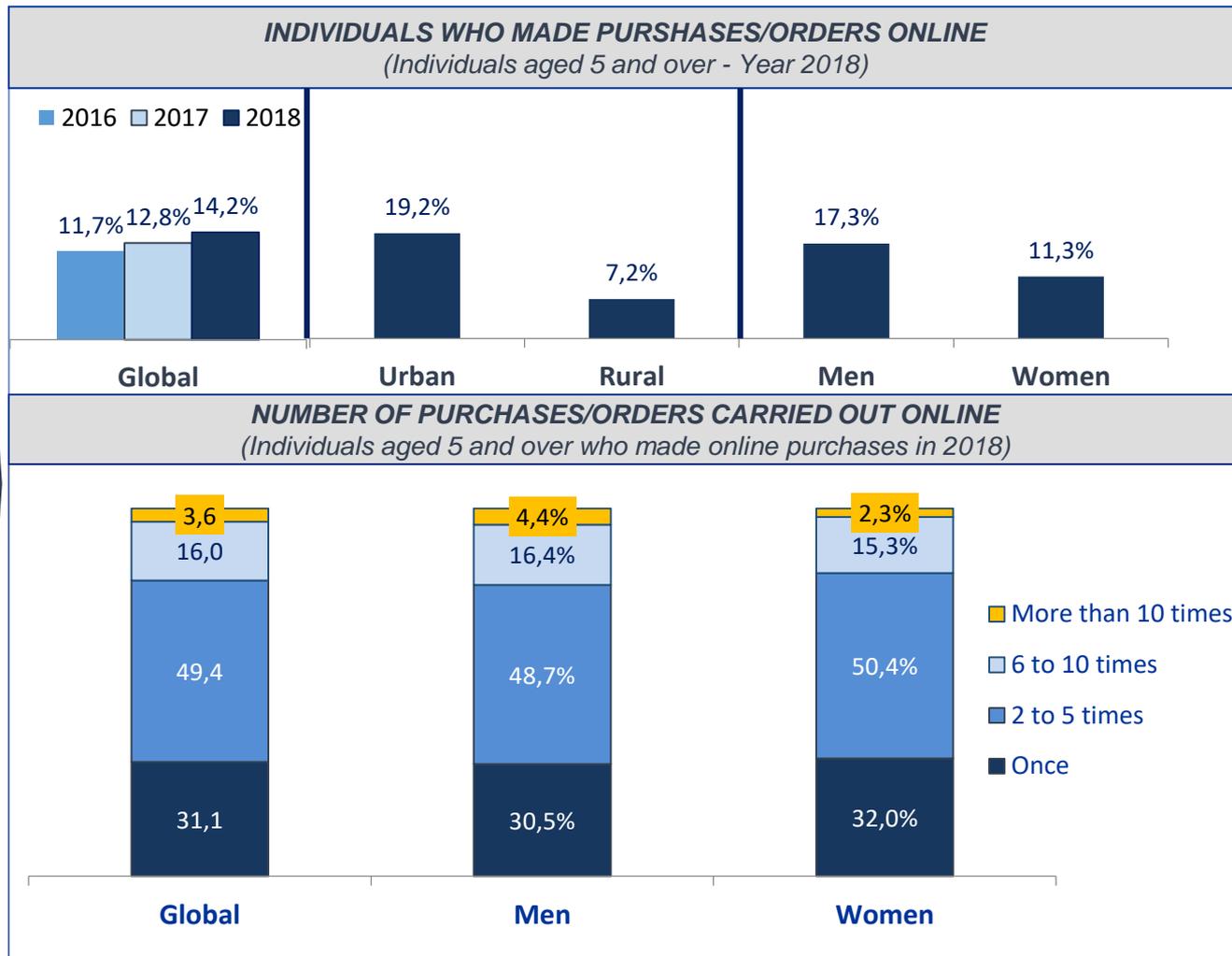
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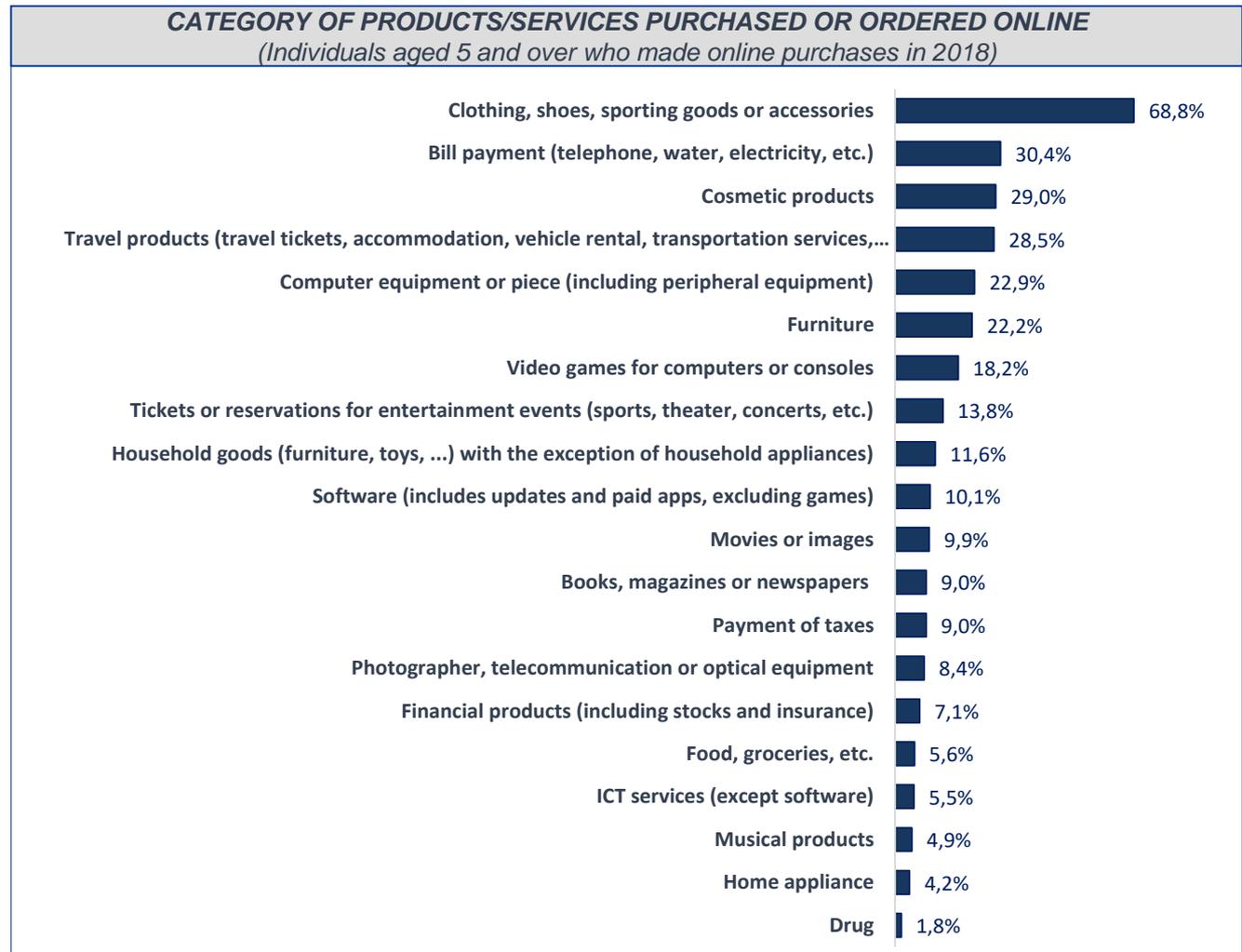
E-commerce continues to grow, increasing by almost 21.3% between 2016 and 2018. Nearly one out of five people use e-commerce in urban areas

- The practice of e-commerce is changing and has more interest in urban than in rural areas.
- Men use e-commerce more than women.
- Nearly half of those who shop online made it 2 to 5 times in 2018.



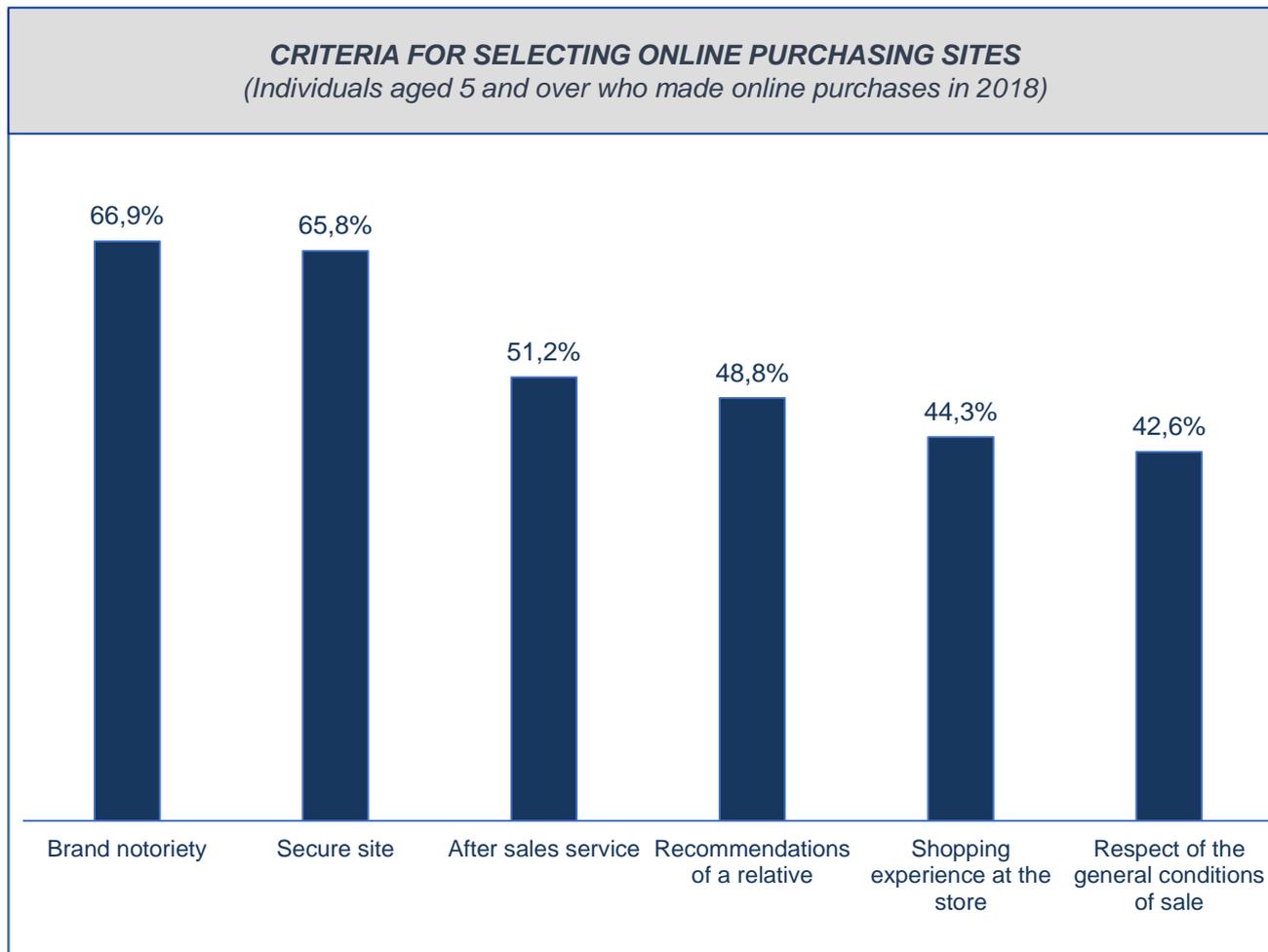
Clothes are at the top list of products purchased online with nearly 70%

Clothes are at the top list of products purchased online with nearly 70% and far surpass other products and services such as bill payments, cosmetics, travel products and computer equipment.



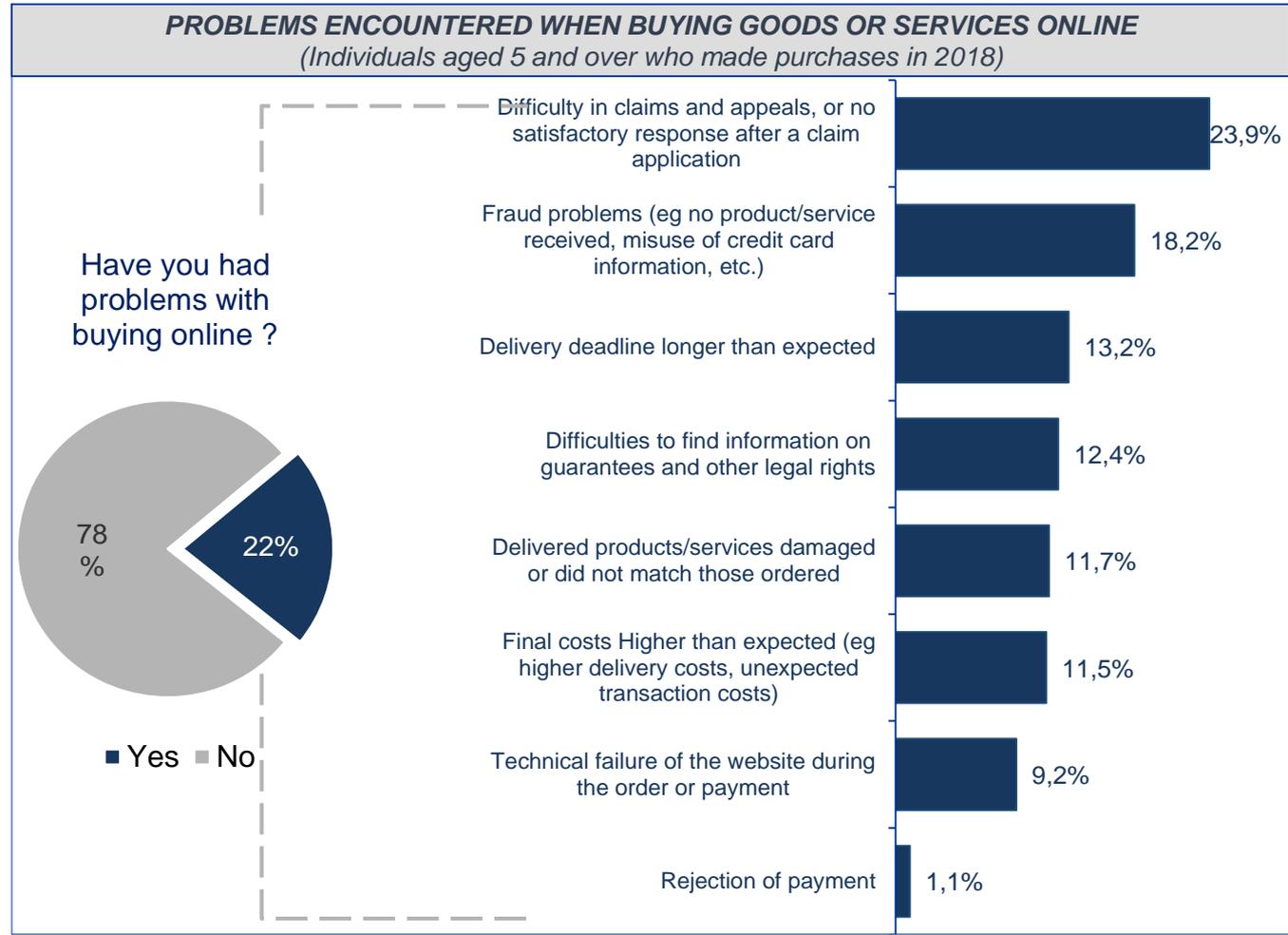
The criteria for selecting an e-commerce site covers a large number of requirements

The reputation of the brand and the security of the commercial site top the criteria for choosing online shopping sites.



Claims concerns and fraud are major issues of online purchasing

The proportion of individuals who have encountered a problem when buying online is low (22%).



Six out of ten people choose store purchase to online one

Preference for direct commerce, lack of trust and skills, and lack of interest are the main obstacles to the use of e-commerce.

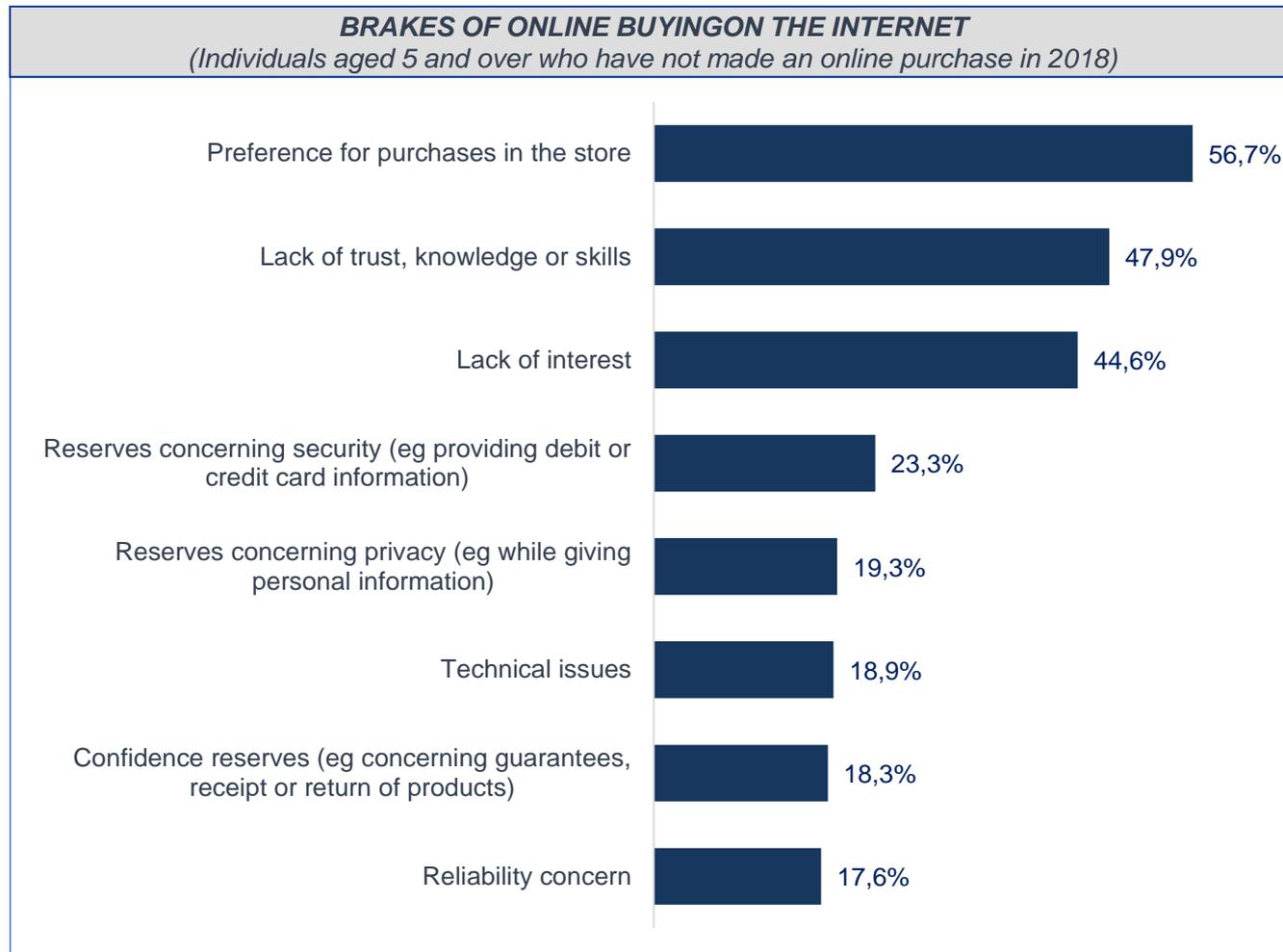


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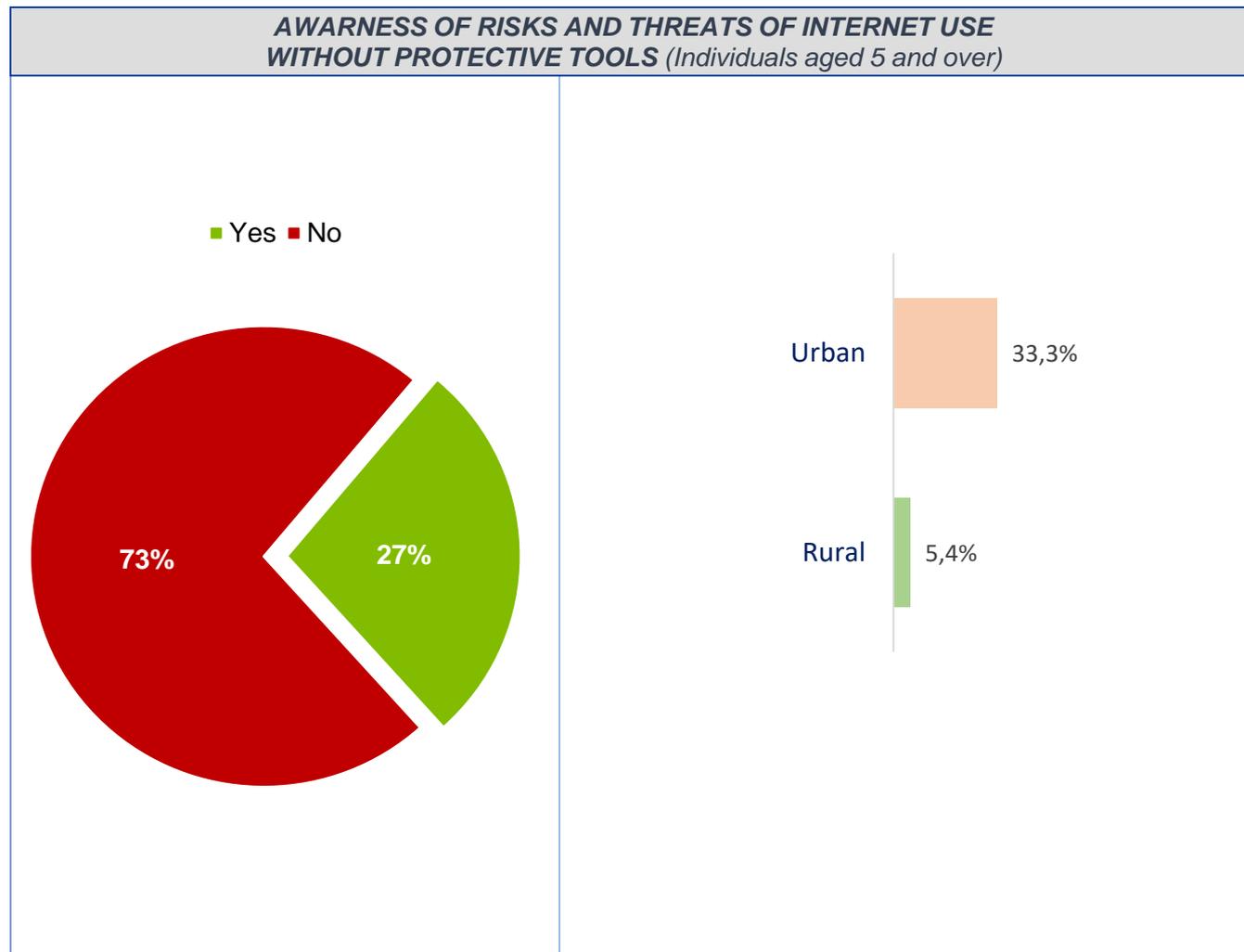
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Three quarters of the population do not measure the risk of lack of online protection

Urban people are six times more aware of the risks of the Internet than rural people.



The antivirus is the preferred security tool (9 out of 10 people)

People who do not use any means of protection justify it by the lack of knowledge of the means to do so.

