



Survey on ICT access and usage by households and individuals in Morocco, 2015

April 2016

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- 7. Social networks**
- 8. Mobile applications**

1 | Methodology

Objectives	<ul style="list-style-type: none">• Complete the information collected from operators in the fixed line, mobile and Internet services markets and to process questions on how ICT is used and how users behave in the context of ICT in order to analyze qualitative aspects such as the drivers or the barriers for access to ICT equipment and its usage ;• Promote accurate, quantitative knowledge of the situation and developments in information society in Morocco ;• Provide a communication medium at the national level ;• Feed international databases (in particular ITU databases) to enable Morocco to be included in classifications of ICT indexes which evaluate and compare the level of ICT development in countries on a worldwide scale.
Targeted population	The households living in urban and rural areas which are equipped with electricity (e.a.); it also concerns the individuals aged 5 years and more.
Population of reference	The reference population is established in accordance with the results of the General Census on Population and Housing conducted in 2014 by the HCP (High Commissioner's Office for Planning). The sample is chosen according to geographic criteria and stratification, based on recent and available HCP's publications along with the 2014 Statistical Yearbook.
Timing	February - March 2016

<p>Sample size</p>	<p>1940 individuals and households, with 1269 in urban area and 671 in rural area.</p>																
<p>Sampling type</p>	<p>The survey adopted the quota sampling. Thus the sample follows the same structure as that of the households' population in Morocco. The major concern is to ensure compliance of the sample with all the criterion which define the individuals (aged 5 years and older); especially the structure of distribution of individuals by region, area of residence, age and gender.</p>																
<p>Distribution criterion</p>	<p>The sample was constructed based on the following five levels of stratification:</p> <ul style="list-style-type: none"> Regions Gender Age rages Area of residence Type of housing 																
<p>Population and reference households in 2015 (Source: HCP, Statistical Yearbook 2014, updated data)</p>	<table border="0"> <tr> <td>Total Population:</td> <td>34 141 002</td> </tr> <tr> <td>Urban Population:</td> <td>20 710 719</td> </tr> <tr> <td>Rural Population:</td> <td>13 430 283</td> </tr> <tr> <td>Population 12-65 years :</td> <td>24 515 886</td> </tr> <tr> <td>Population 5 years and older :</td> <td>31 194 904</td> </tr> <tr> <td>Total households :</td> <td>7 378 760</td> </tr> <tr> <td>Urban households :</td> <td>4 873 110</td> </tr> <tr> <td>Rural households :</td> <td>2 505 650</td> </tr> </table>	Total Population:	34 141 002	Urban Population:	20 710 719	Rural Population:	13 430 283	Population 12-65 years :	24 515 886	Population 5 years and older :	31 194 904	Total households :	7 378 760	Urban households :	4 873 110	Rural households :	2 505 650
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2 | Main results

**MOBILE TELEPHONY
EQUIPMENT**

The mobile telephony equipment rate within individual (12 to 65 years) is stagnant in 2015 (94,4% of overall equipment against 94,1% in 2014).
The individuals equipment with smartphone records a notable growth moving from 38,2% in 2014 to 54,7% in 2015.

INTERNET EQUIPMENT

The Internet penetration rate within households continues its positive trend: 66.5% of households are equipped with Internet access in 2015 (against 50.4% in 2014) with a net increase in the mobile Internet equipment which is adopted by 65% of households, whereas 16.3% of households are equipped with fixed internet access.

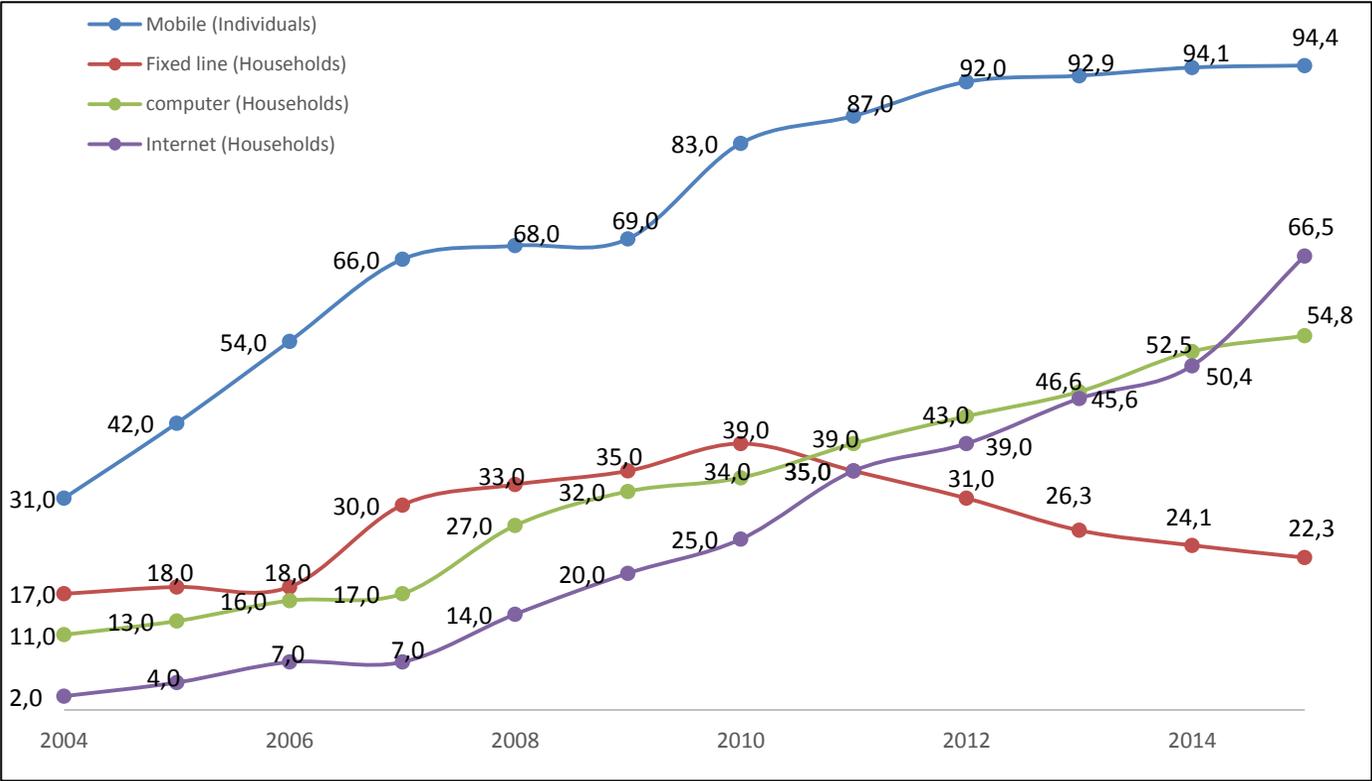
**COMPUTER
EQUIPMENT**

The household's equipment with computer (including tablet) increased to 54.8% in 2015 against 52.5% in 2014. The household's equipment with tablet continued to grow this year by 9 points comparing to 2014 (20.8% in 2015 against 11.8% in 2014).

**FIXED TELEPHNY
EQUIPEMENT**

The fixed telephony equipment within households decreased during 2015 (22.3% in 2015 against 24.1% in 2014). This trend observed during the last five years is explained by the continued decline in the number of subscriptions for fixed telephony with restricted mobility.

Households and individuals' ICT equipment (2004 – 2015)



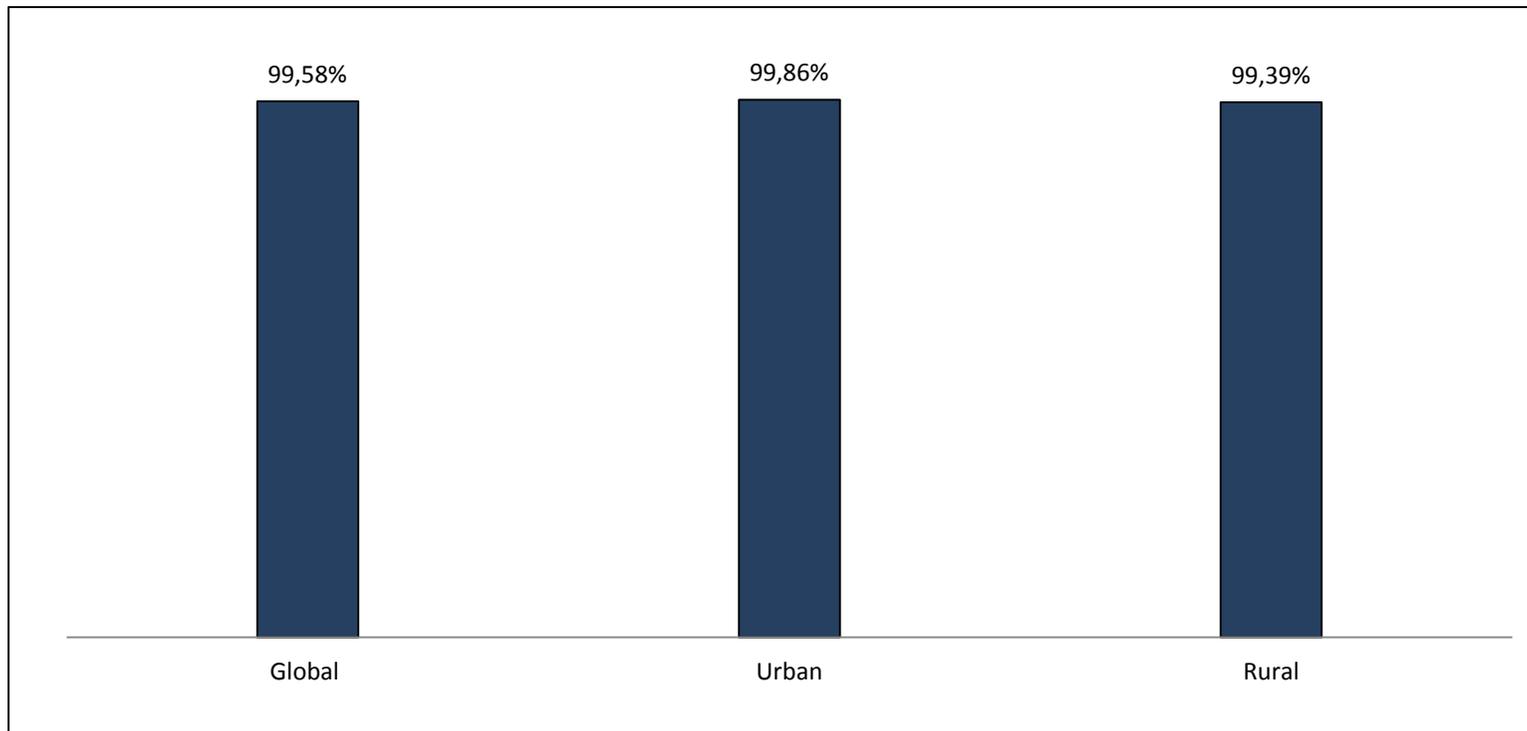
% individuals 12-65 years
 % households in electrified areas

3 | Mobile telephony equipment

Mobile telephony is widespread in almost all the households in both urban and rural areas.

HOUSEHOLDS EQUIPMENT WITH AT LEAST ONE MOBILE PHONE

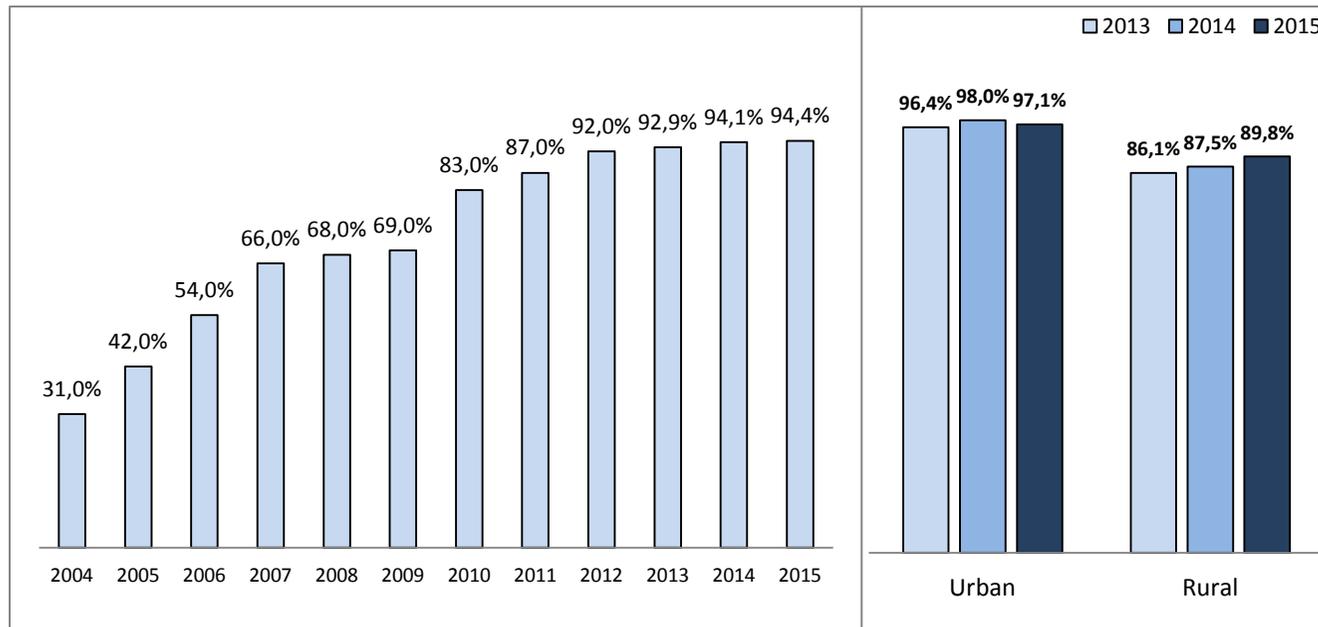
(% of households in e.a.)



- 94.4% of individuals aged 12-65 years are equipped with mobile phones. This rate reached 97.1% in urban and 89.8% in rural areas.
 Globally, the mobile equipment within individuals shows a stagnation in 2015, a slight decrease in urban area and an increase of 2,5 points in rural area which reduces the gap between the two areas.

INDIVIDUALS EQUIPMENT WITH MOBILE TELEPHONY

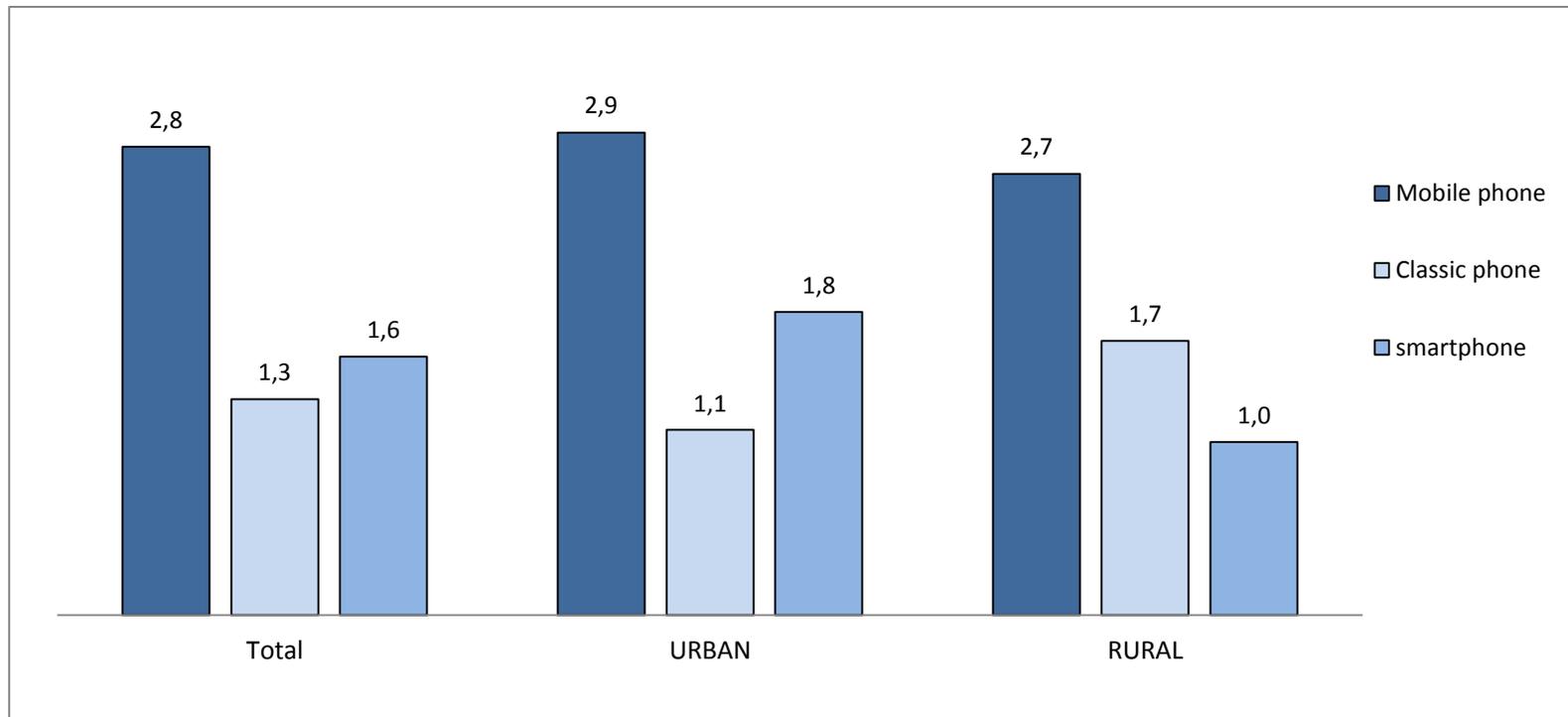
(% of individuals aged 12 to 65 years in e.a.)



- The average number of mobile phones in the household is 2,8 (2,9 in urban household against 2,7 in rural household). This average number is 1,6 for smartphone against 1,3 for the classic mobile phone.

AVERAGE NUMBER OF INDIVIDUALS EQUIPPED WITH MOBILE PHONES IN THE HOUSEHOLD

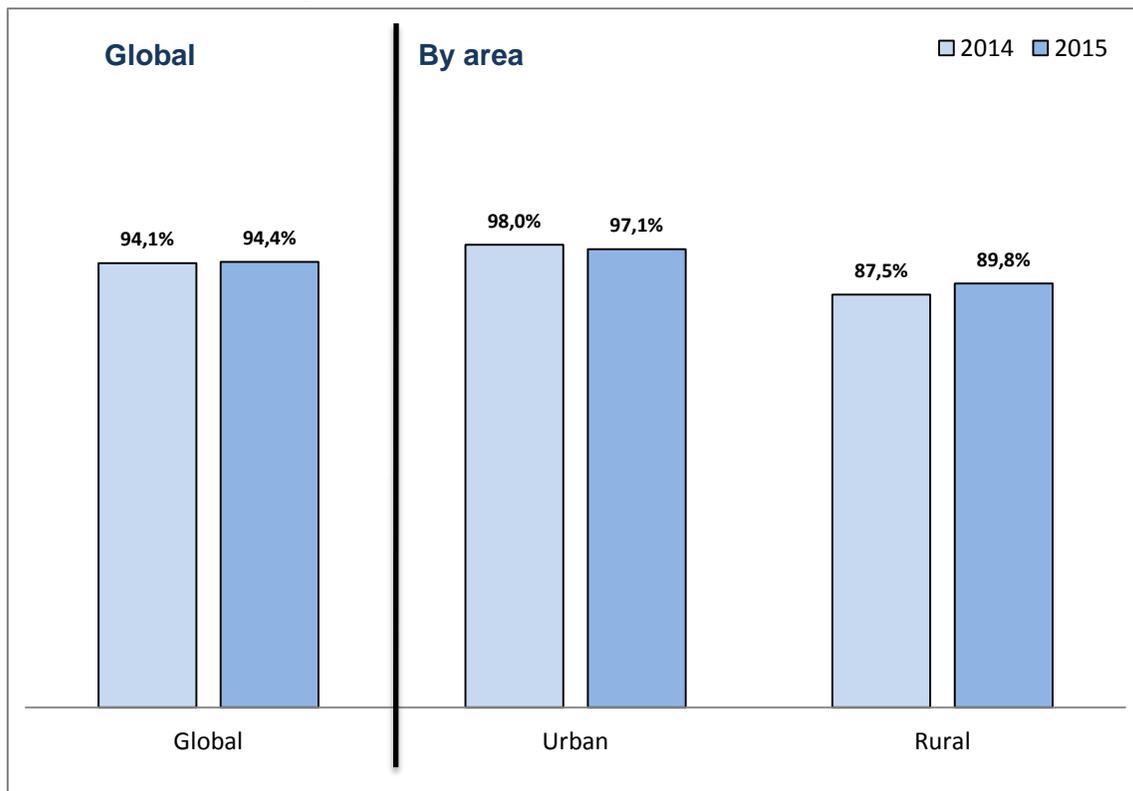
(% of households in e.a.)



- In 2015, the rate of individuals (12-65 years) equipped with more than one SIM card is practically stagnant compared to 2014.
- The average number of SIM cards per individual remains unchanged (1,15).

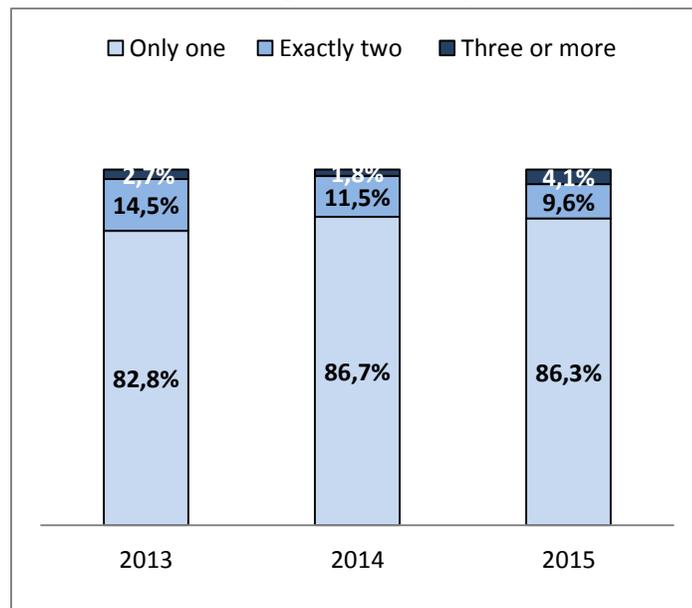
MOBILE PHONE EQUIPMENT

(% of individuals aged 12 to 65 years in e.a.)



INDIVIDUALS EQUIPPED WITH SIM CARDS

(% of individuals aged 12 to 65 years in e.a.)

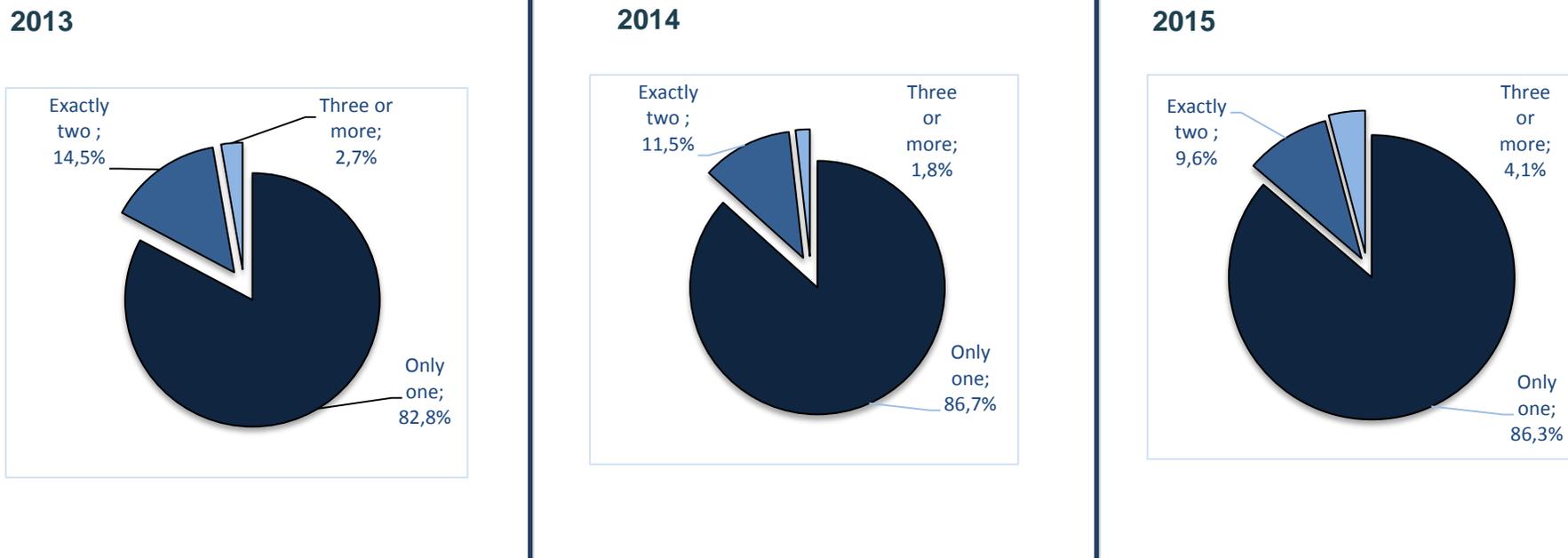


More than one SIM card	13,3%	13,7%
Average number of SIM per ind.	1,15	1,15

- The proportion of individuals (12-65 years) equipped with more than one SIM card reached 13,7% in 2015 (against 13,3% in 2014).

DISTRIBUTION OF INDIVIDUALS REGARDING THE NUMBER OF SIM CARDS

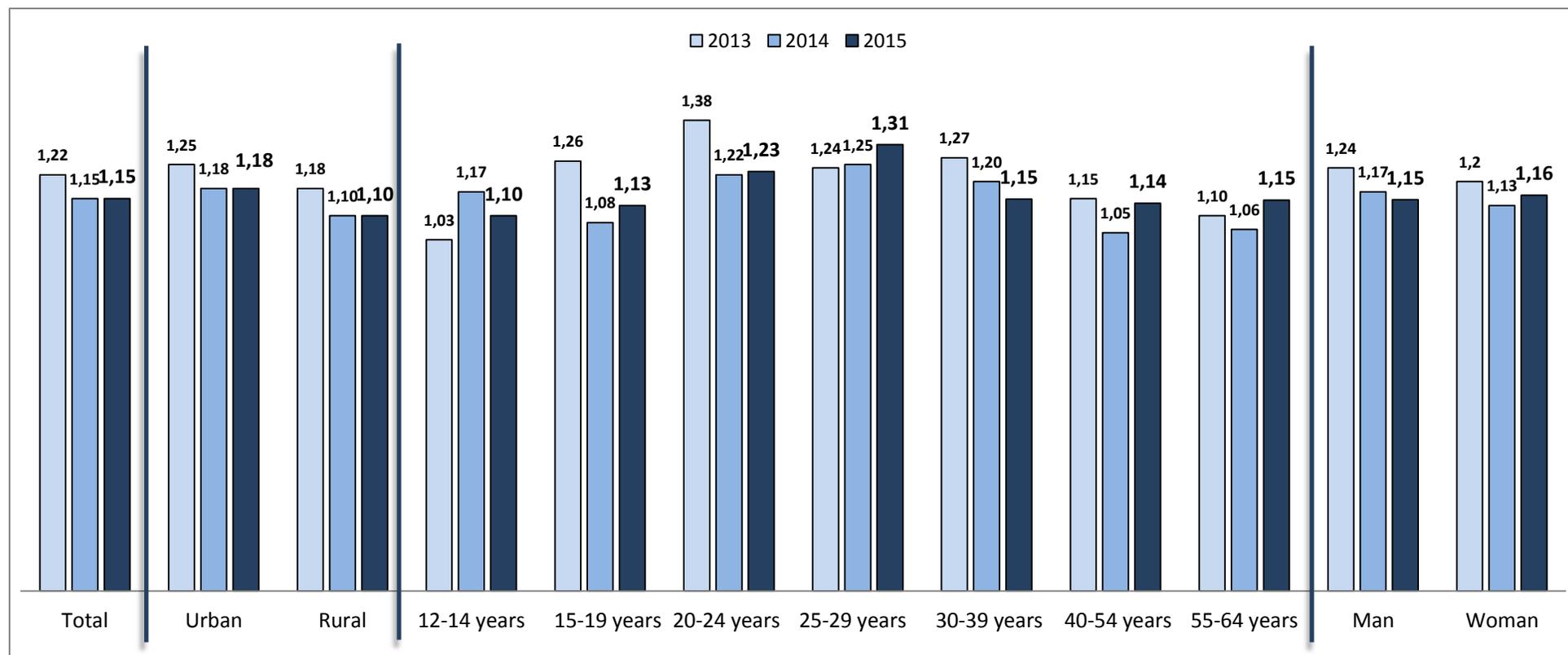
(% of individuals aged 12 to 65 years equipped with SIM card in e.a.)



- Young people (20 – 29 years) have the highest average number of SIM cards in 2015. A difference between urban and rural areas is noticed (1,18 and 1,10 respectively).

AVERAGE NUMBER OF SIM CARD PER INDIVIDUAL

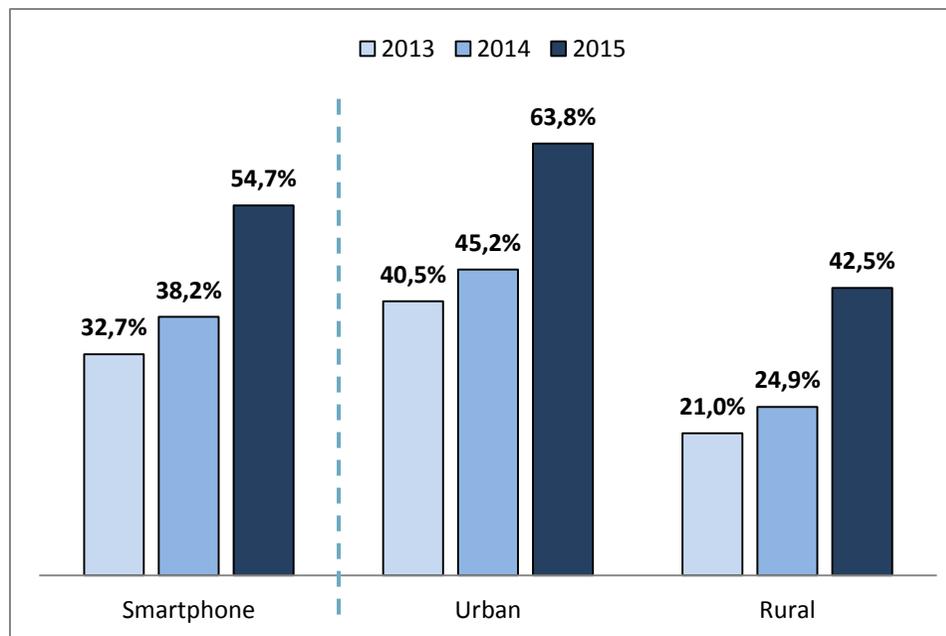
(Individuals aged 12 to 65 years in e.a.)



- 54.7% of individuals (12 - 65 years) equipped with mobile phone own at least one smartphone in 2015, showing a significant growth compared to previous years.
- In rural area, the Smartphone equipment shows a significant increase moving from 24.9% to 42.5% in one year.
- The estimated number of smartphone is 14.7 millions units in 2015, which represents a significant increase of 5.3 millions units compared to 2014.

INDIVIDUALS EQUIPPED WITH SMARTPHONE

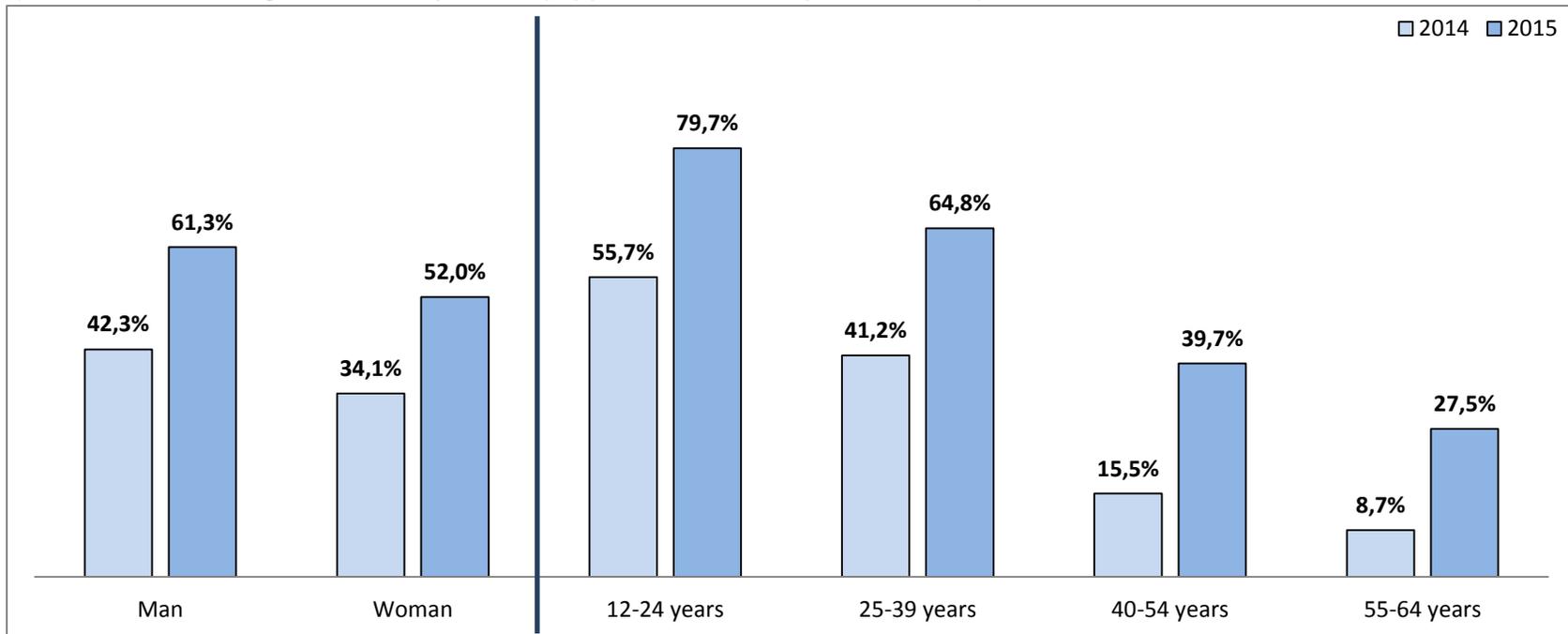
(% of individuals aged 12 to 65 years equipped with mobile phone in e.a.)



- The proportion of individuals equipped with a smartphone among those who own a mobile phone decreases as the age rises. Regarding mobile phone equipped individuals, 80% aged 12 to 24 years have smartphone against only 27,5% for those aged 55 to 64 years.
- A significant increase is shown in all age groups but the strongest growth in smartphone equipment is registered among the 12 -24 years age group.
- According to gender, the smartphone equipment within men is slightly higher than women's smartphone equipment.

INDIVIDUALS EQUIPPED WITH SMARTPHONE

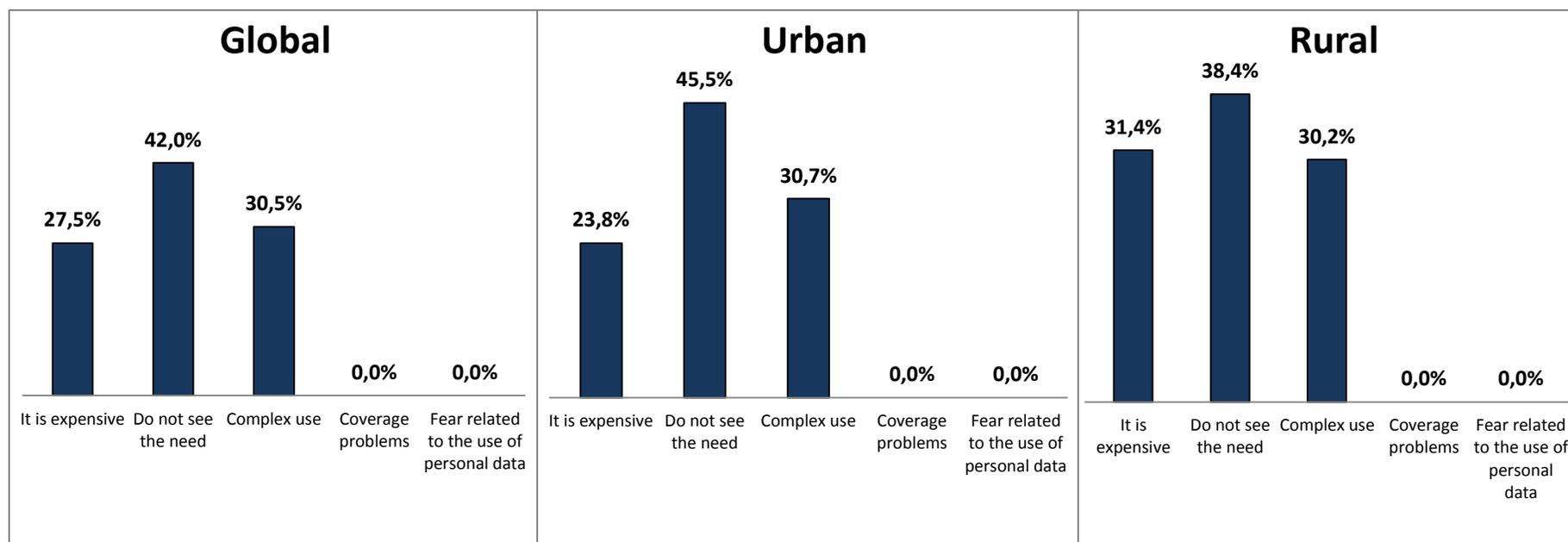
(% of individuals aged 12 to 65 years equipped with mobile phone in e.a.)



- The barriers to smartphone equipment are the lack of usefulness and complexity of usage (respectively 42% and 30,5%). Those rates are almost similar in urban and rural areas.

BARRIERS TO EQUIPEMENT WITH SMARTPHONE

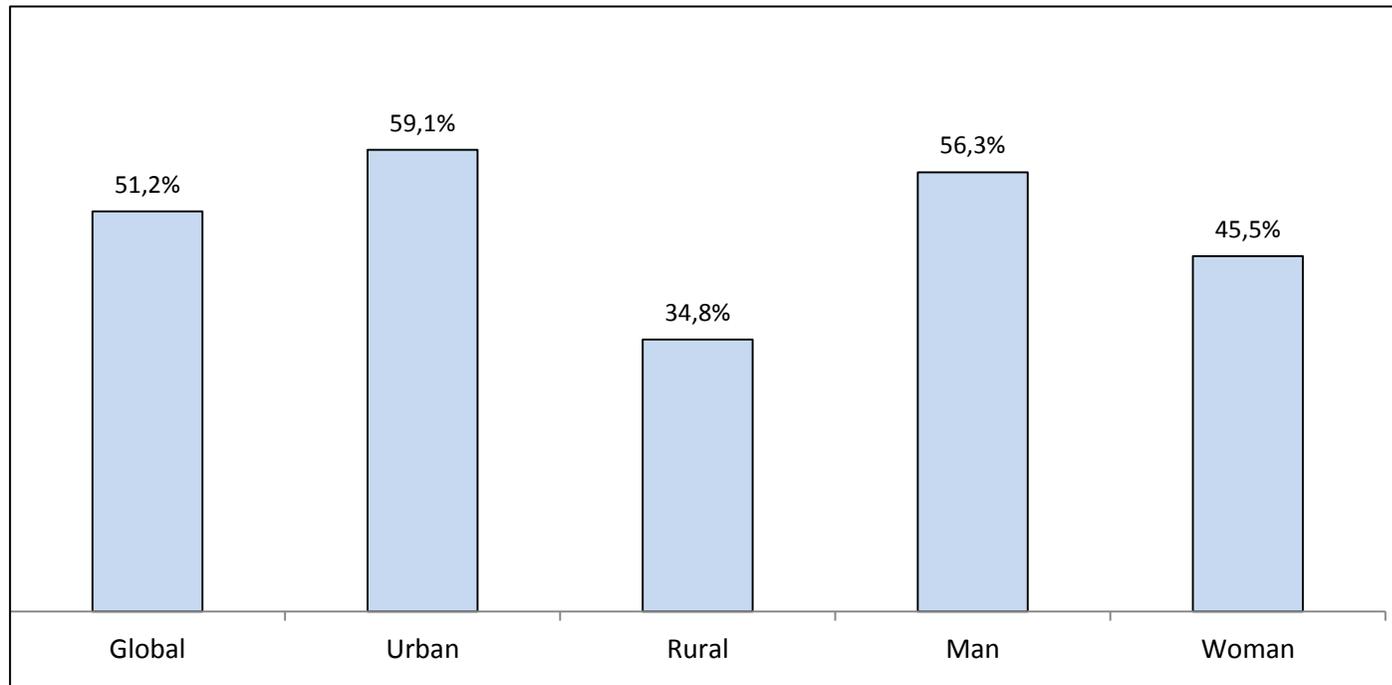
(% of individuals aged 12 to 65 years without smartphone in e.a.)



- More than half of the individuals equipped with mobile phone living in urban area (12-65 years) use their mobile phones to access the Internet (59.1%). This rate is 34,8% in rural area.
- According to gender, the proportion of men user of Internet on the mobile phone (56.3%) is bigger than those of women user (45.5%).

INTERNET USE ON MOBILE PHONE

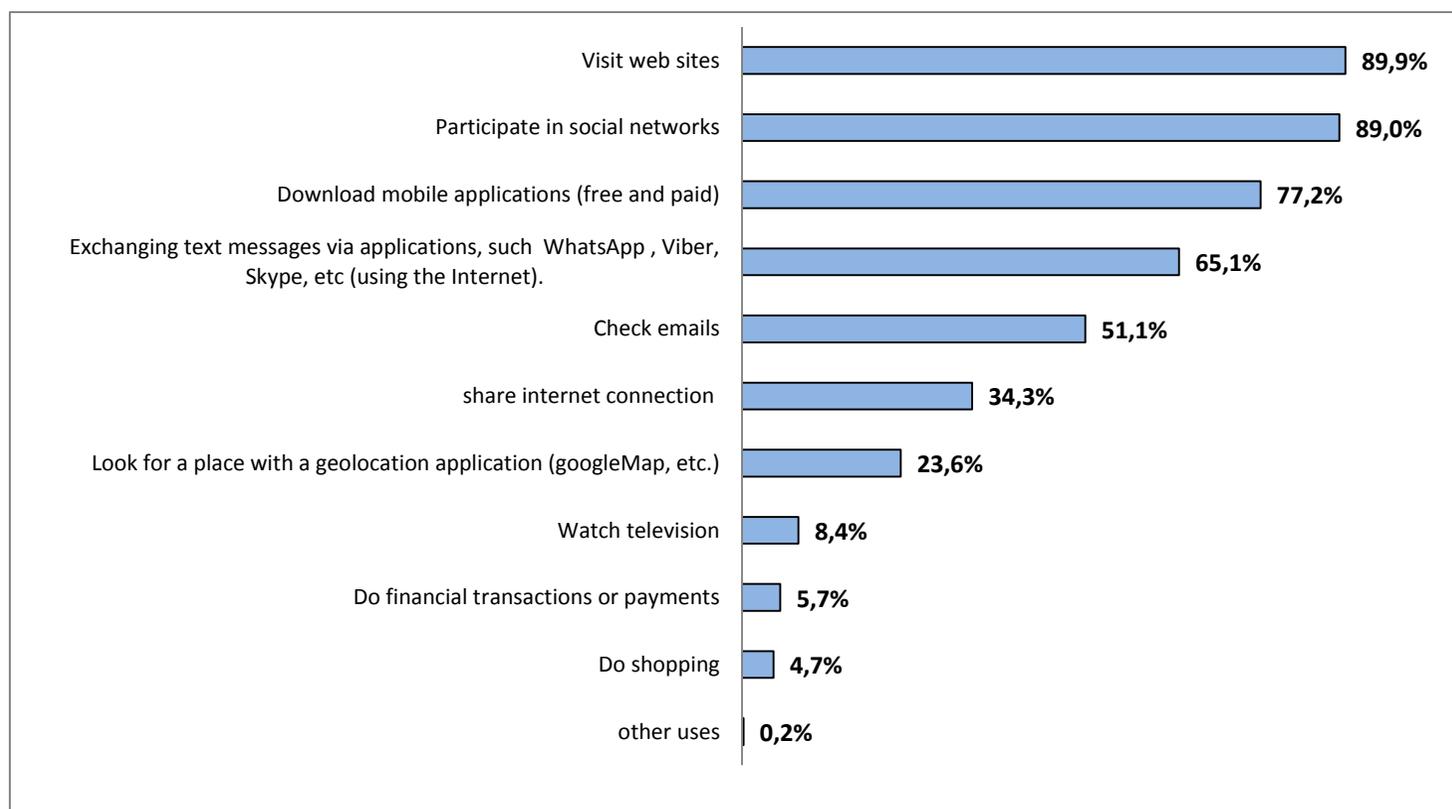
(% Individuals aged 12 to 65 years equipped with mobile phone)



- Individuals do use the Internet on their mobile phones particularly to access websites (9/10), participate in social networks (9/10), download mobile applications (3/4), exchange text messages (2/3), check emails (1/2), share Internet access (1/3) and use a geolocation software (1/4).

INTERNET USE ON THE MOBILE PHONE

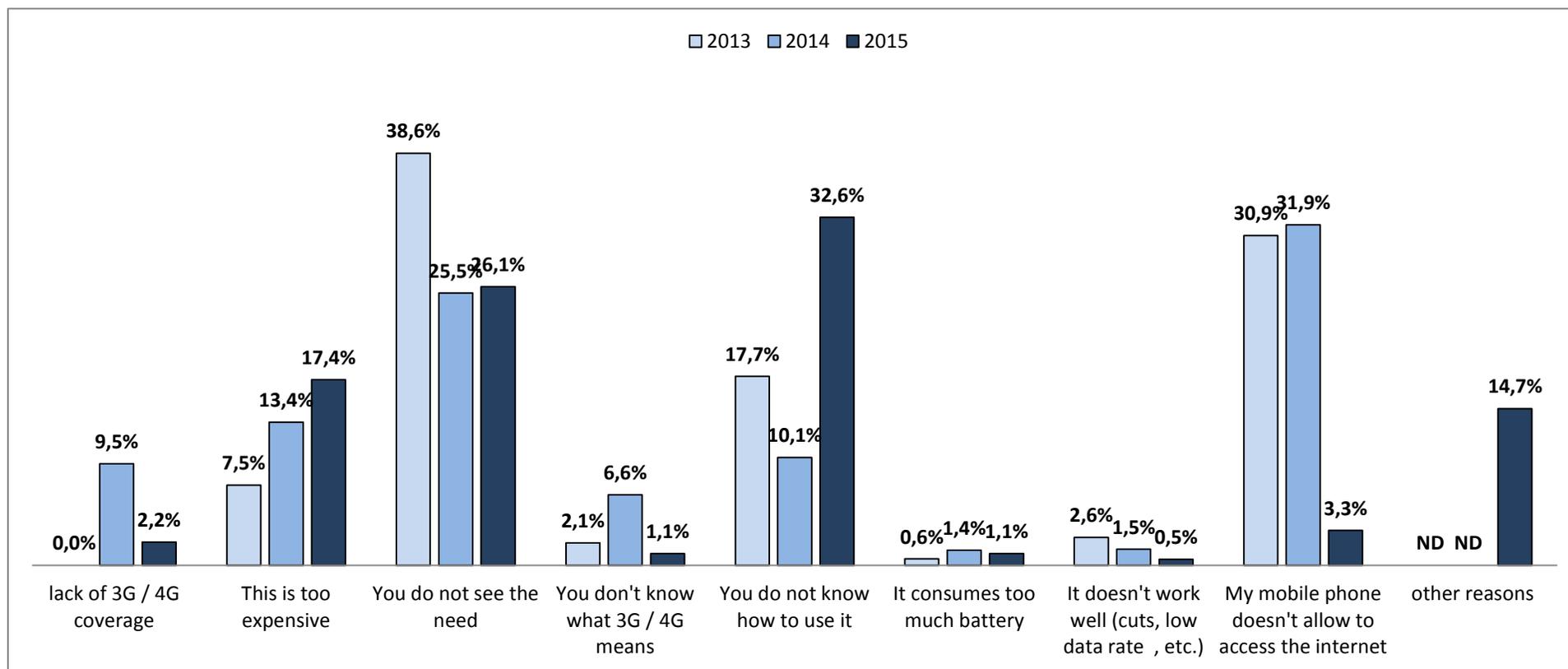
(% of individuals aged 12 to 65 years equipped with mobile phone and use it to access the internet in e.a.)



- Lack of skill is the main barrier to internet use on mobile phones (32.6%), followed by lack of need (26.1%) and the price (17.4%). The lack of coverage is rarely mentioned (2.2%).

MAIN BARRIERS TO INTERNET USE ON MOBILE PHONES

(% of individuals aged 12 to 65 years who don't use mobile phones to access internet)

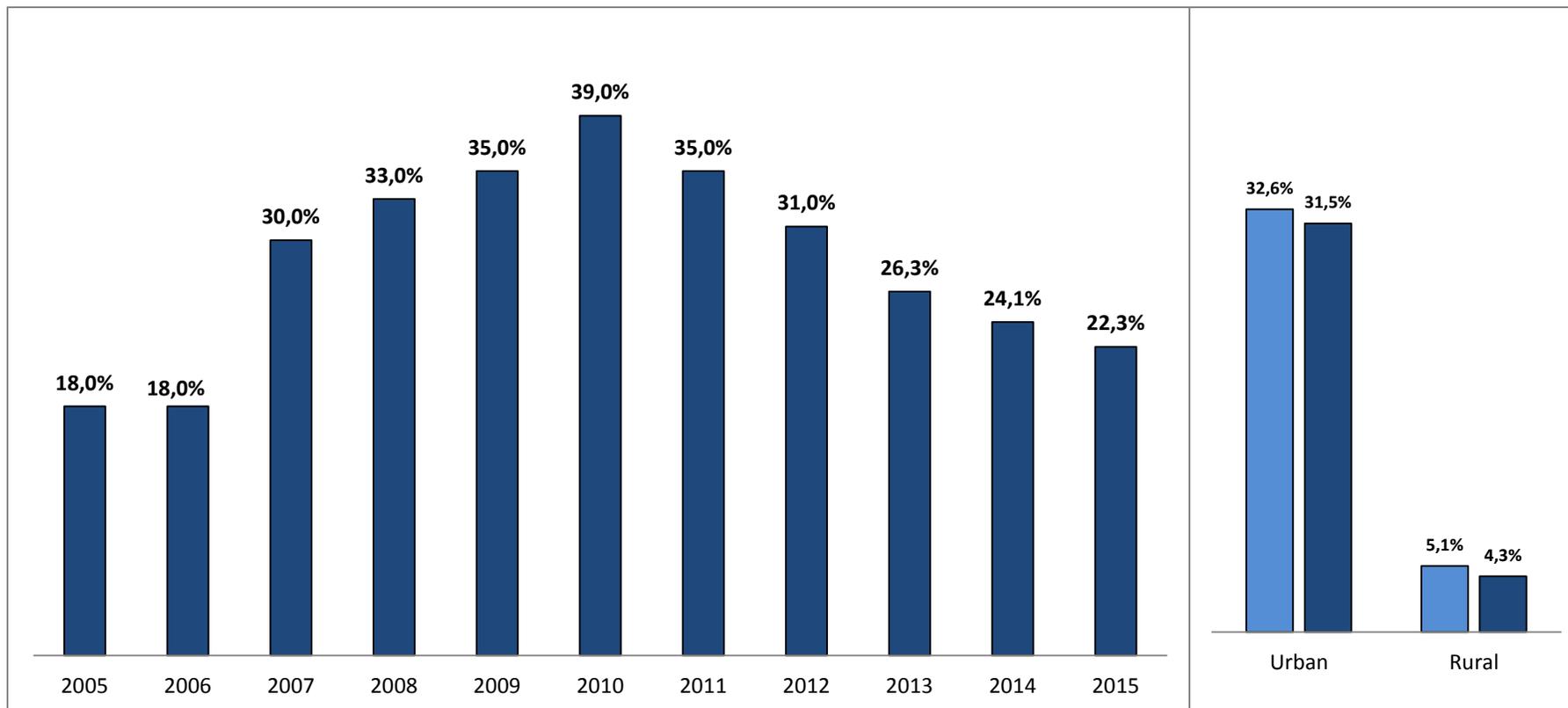


4 | Fixed telephony equipment

- The households equipment rate with fixed lines has been decreasing during the past six years with less than one among four households is equipped (22.3%). In urban area, this proportion is 31.5% against 4.3% in rural area.

HOUSEHOLD'S EQUIPMENT WITH FIXED TELEPHONY

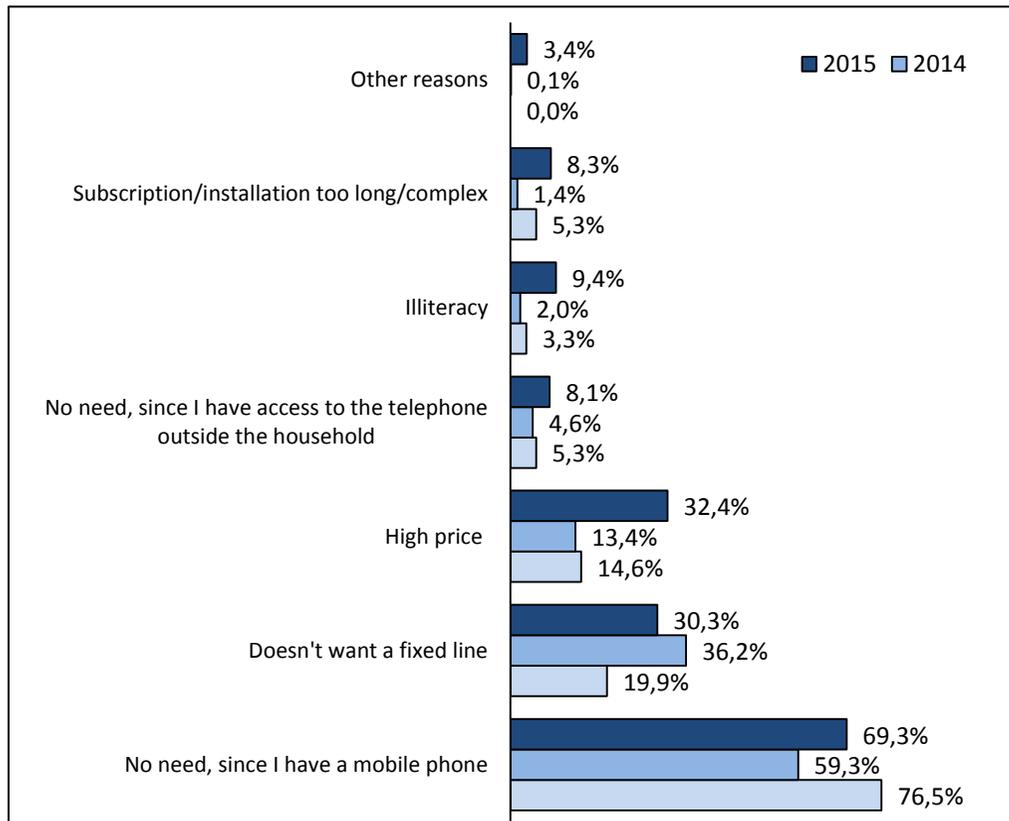
(% of Households in e.a.)



- About 7 out of ten households report that they don't need fixed telephony line because they use mobile telephony.
- Only 7.2% of households which are not equipped with fixed telephony intend to get equipped.

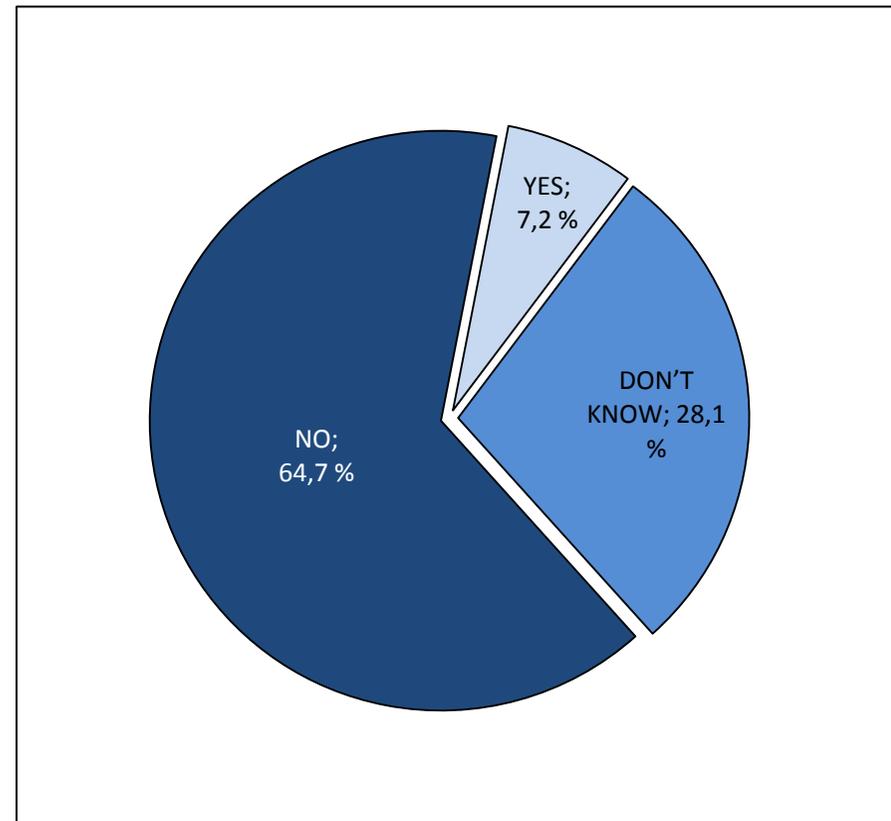
BARRIERS TO THE EQUIPMENT WITH FIXED TELEPHONY

(% of households not equipped with fixed line in e.a.)



INTENTION OF EQUIPMENT WITH FIXED TELEPHONY

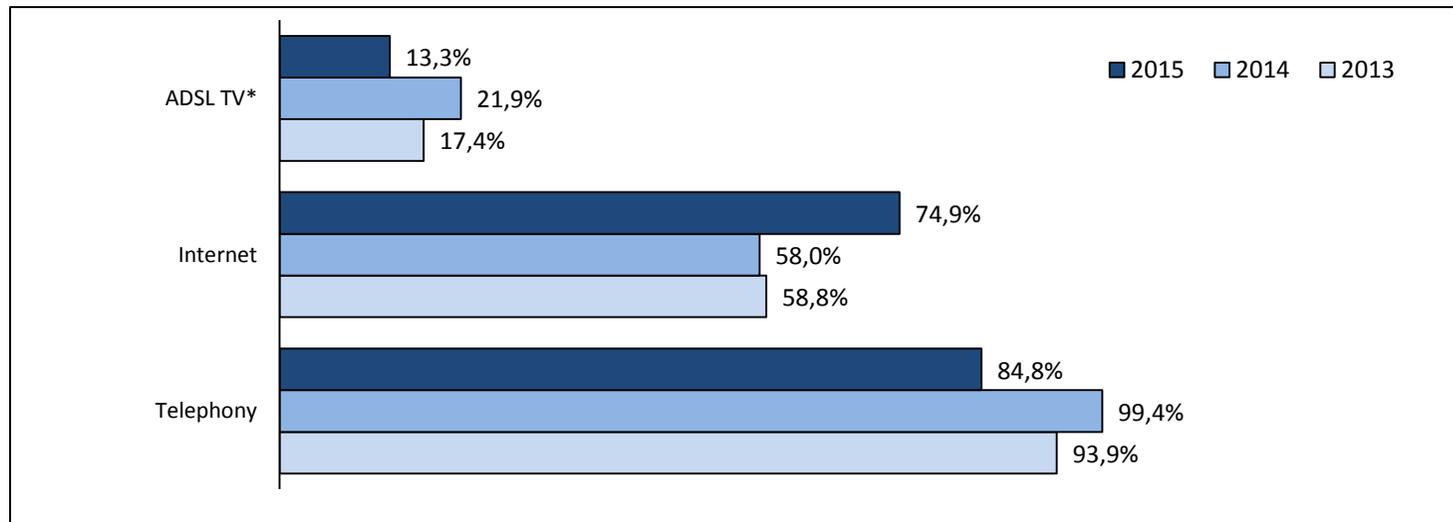
(% of households not equipped with fixed line in e.a.; 2015)



- **Access to Internet ADSL was reported by three quarters of households; Therefore it is one of the main reasons that motivates the equipped households with fixed telephony. This proportion shows a significant increase compared to 2014 and 2013**

MOTIVATIONS FOR EQUIPMENT WITH FIXED TELEPHONY

(% of households equipped with fixe telephony line in e.a.)



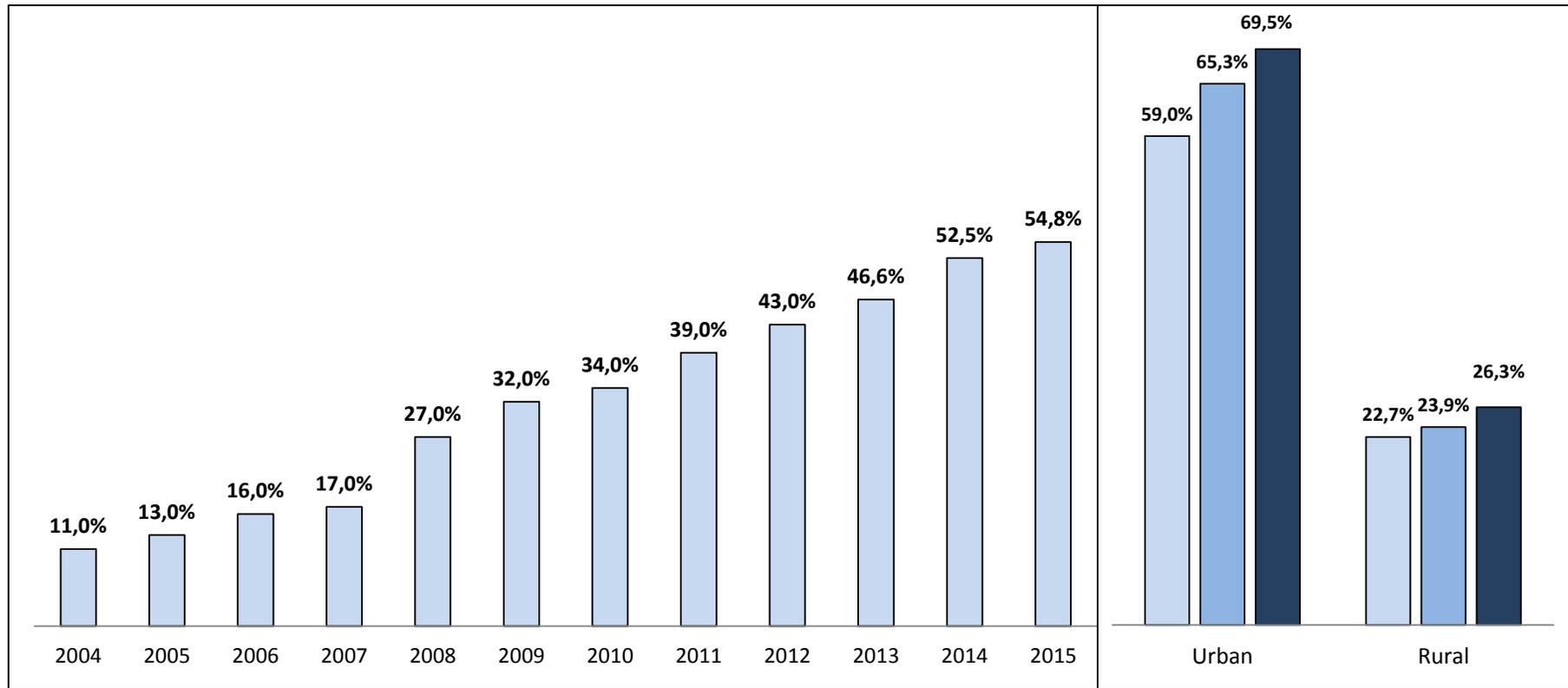
* Including DreamBox

5 | Computer equipment

- 54.8% of households are equipped with computer/tablet.
- This proportion varies according to the area of living with nearly 7 in 10 urban households against over a quarter for rural households.

EQUIPMENT WITH COMPUTER/TABLET

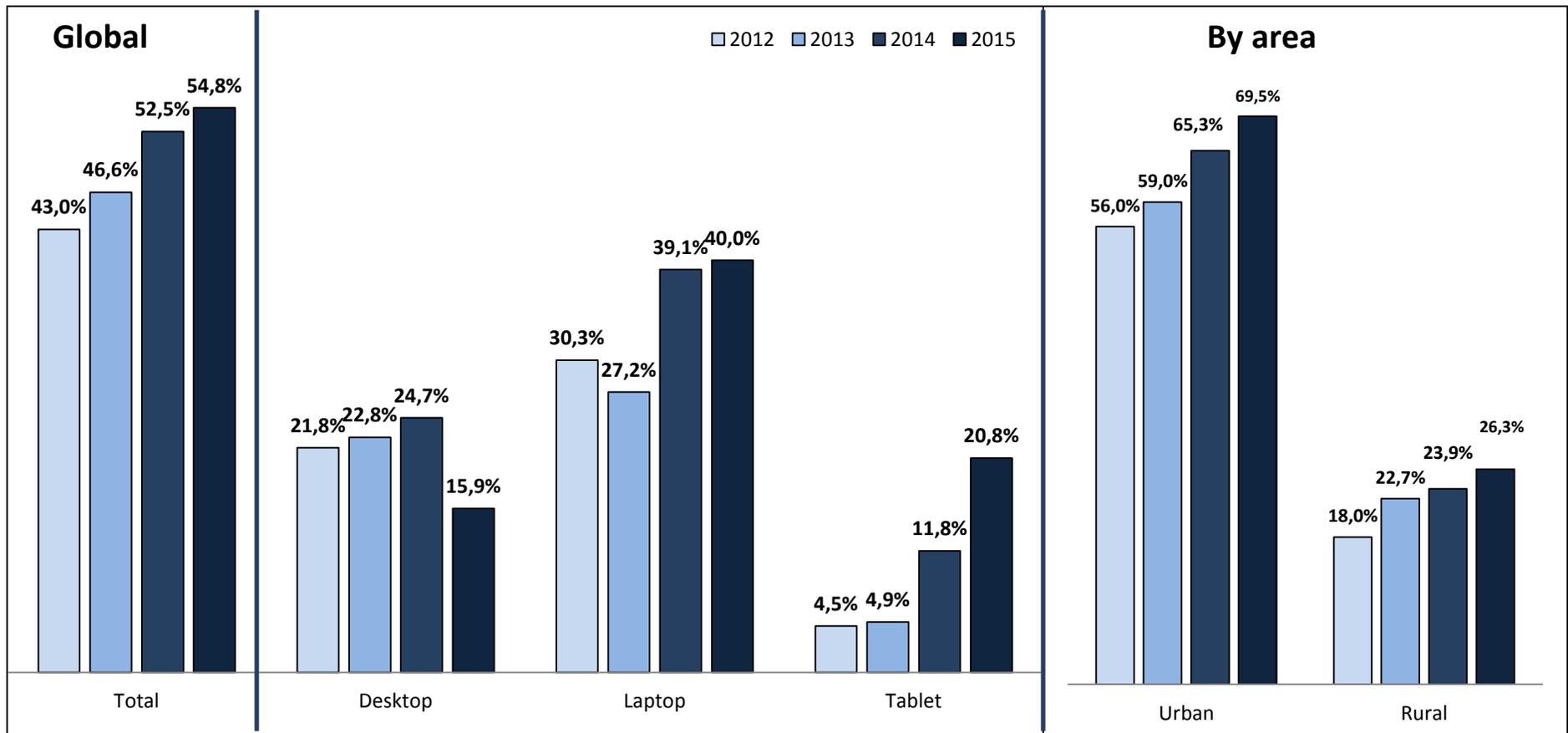
(% of households in e.a.)



- The tablet recorded a significant increase, the desktop registered a sharp decrease while the laptop equipment remained almost stagnant.

EQUIPMENT WITH DESKTOP/LAPTOP/TABLET

(% of Households in e.a.)

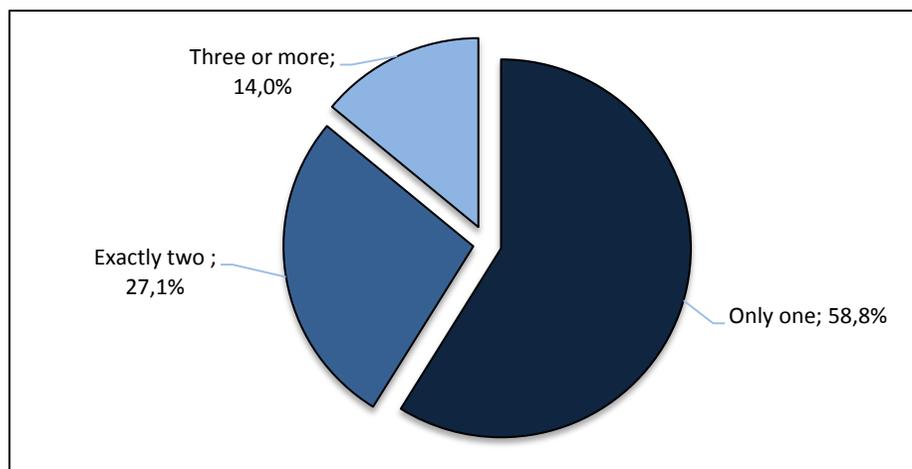


- Nearly half of households equipped with computers have two computers/tablets or more (47.8%). This proportion has increased between 2014 and 2015.
- The increase is especially important for households with three computers/tablets. This proportion rises from 14% to 20.1%.

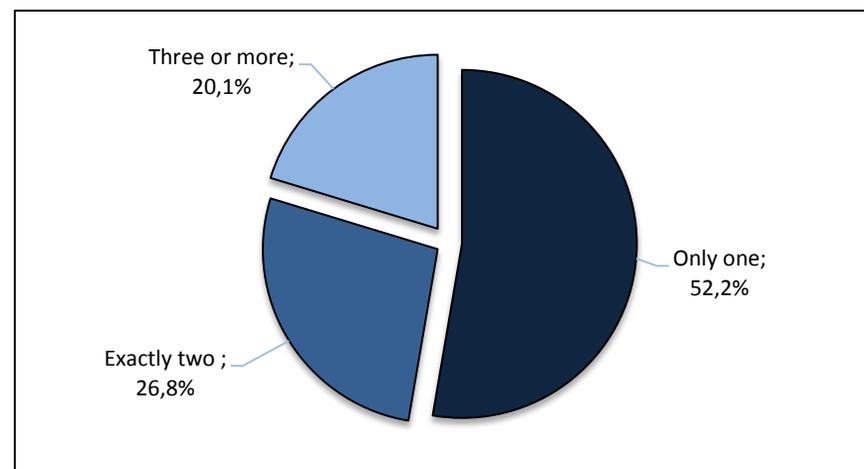
HOUSEHOLDS DISTRIBUTION BY THEIR EQUIPMENT WITH COMPUTER / TABLET

(% of Households equipped with computer/tablet)

2014



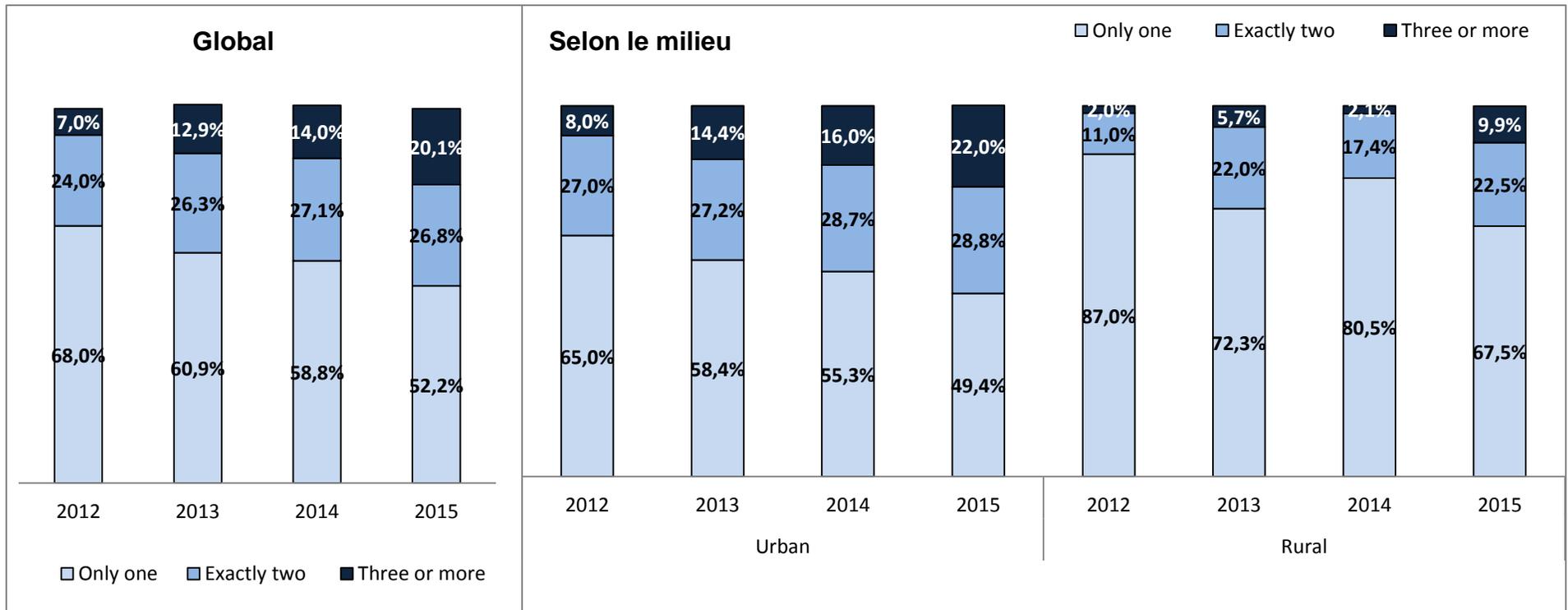
2015



- Households equipped with only one computer/tablet decreases from 58.8% to 52.2% between 2014 and 2015 ;
- One of two households in urban area and two of three households in rural area are equipped with one single computer/tablet ;
- The proportion of households equipped with more than one computer/tablet increased in both urban and rural area.

HOUSEHOLDS' EQUIPMENT WITH COMPUTER/TABLET

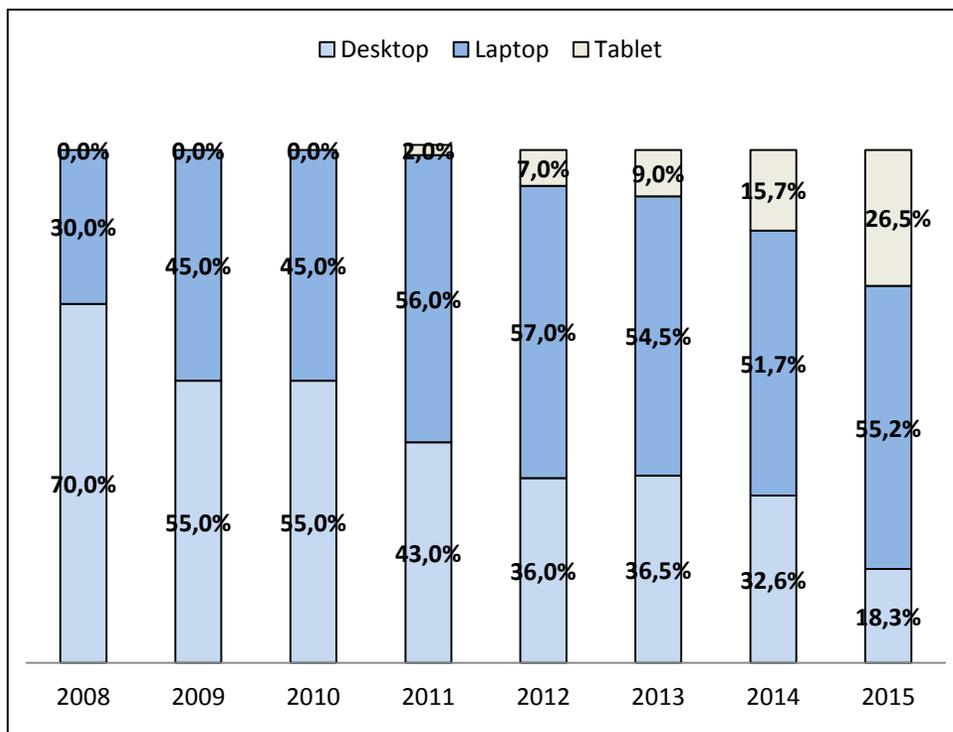
(% of households equipped with computer/tablet in e.a.)



- The tablets are continuing their positive trend and represent more than a quarter of the total computers / tablets owned.
- This desktops experienced a significant regression.

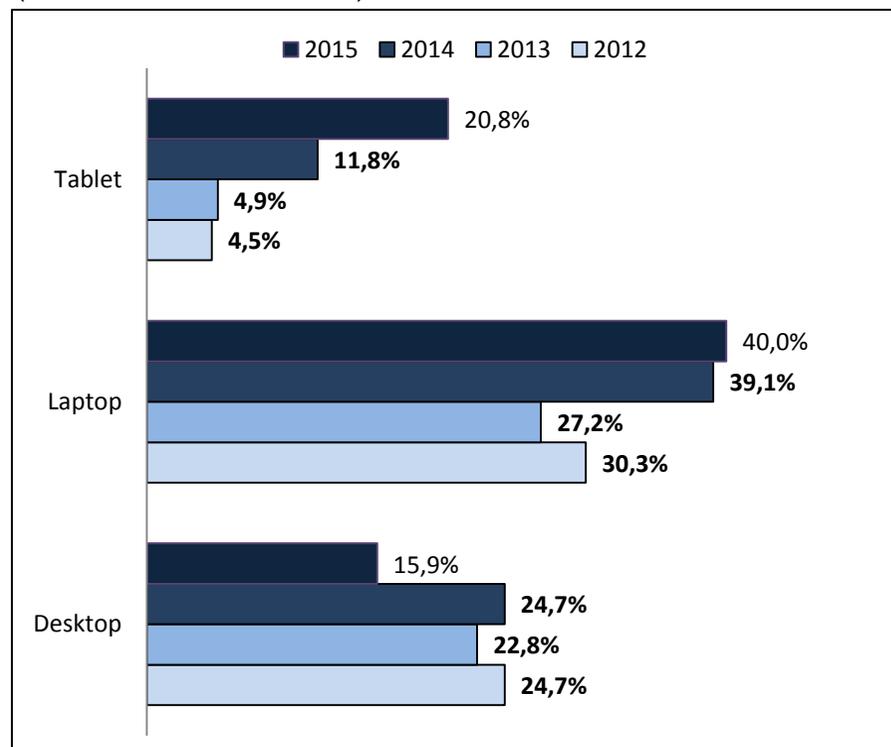
TYPES OF COMPUTER

(% Computers in the households)



TYPES OF COMPUTER

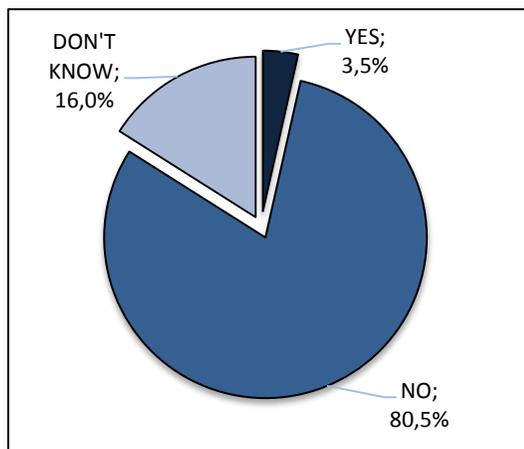
(% of households in e.a.)



- The intentions to replace or buy a laptop (9.1%) or tablet (7.7%) are more important than those to buy / replace a desktop (3.5%).

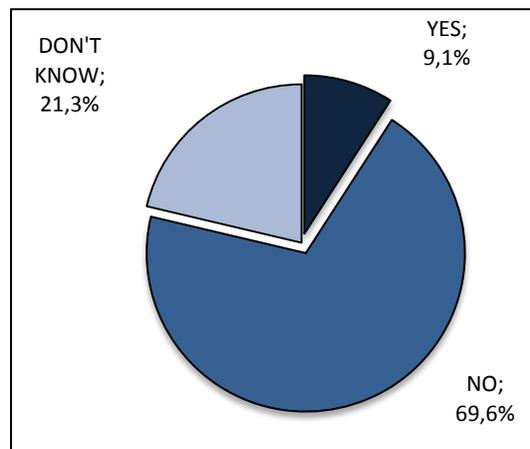
INTENTION TO REPLACE OR BUY A DESKTOP

(% of households ; 2015)



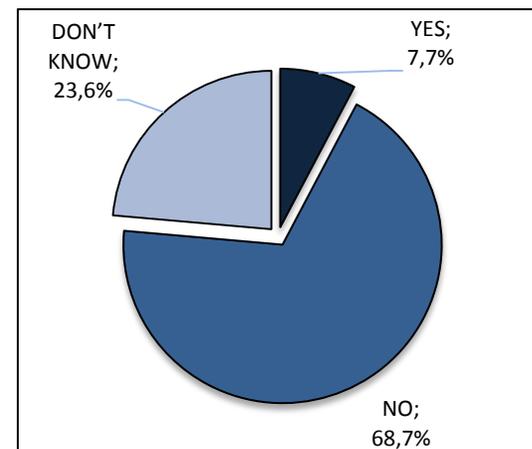
INTENTION TO REPLACE OR BUY A LAPTOP

(% of households ; 2015)



INTENTION TO REPLACE OR BUY A TABLET

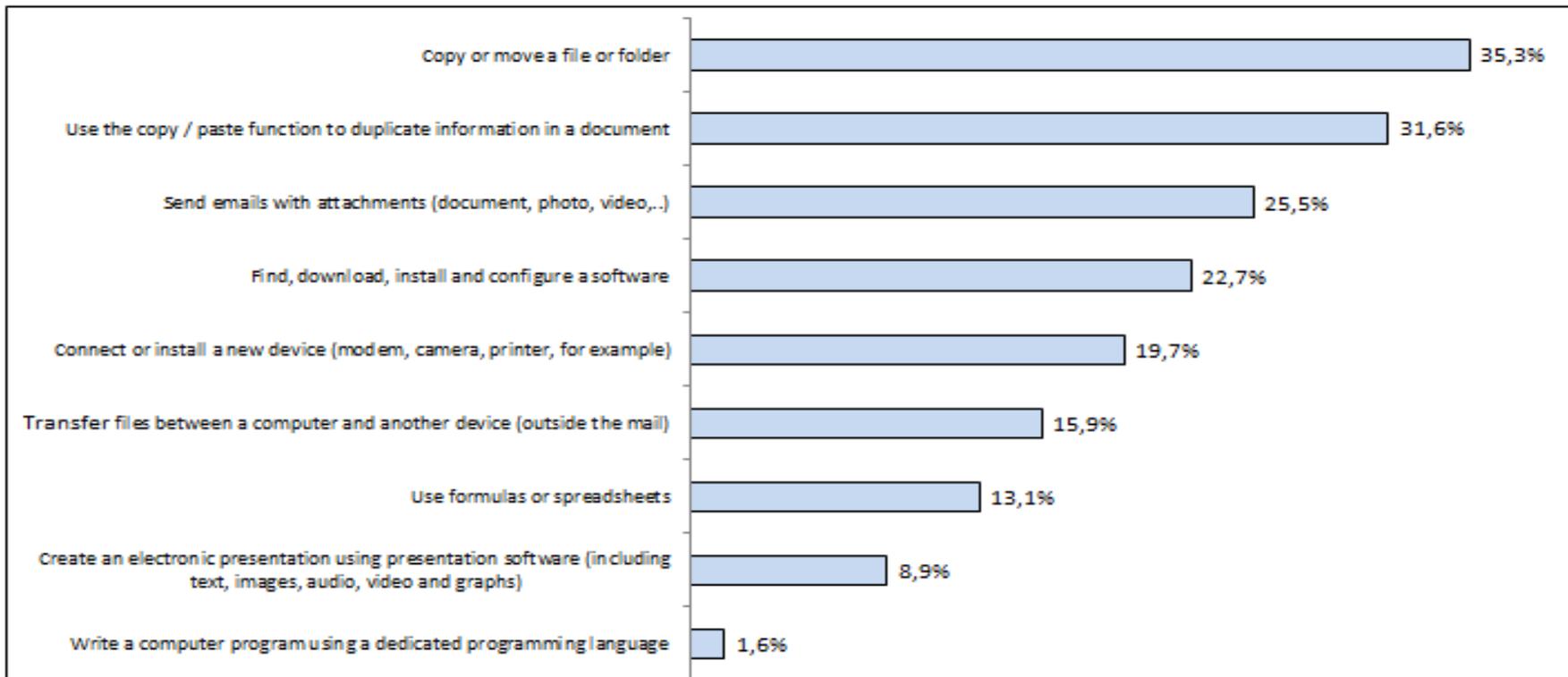
(% of households ; 2015)



- Copy and move files, use the copy/paste functions and send emails are the most mastered skills by users of computers/tablets with respectively 35,3%, 31,6% and 25,5%.

COMPUTER SKILLS

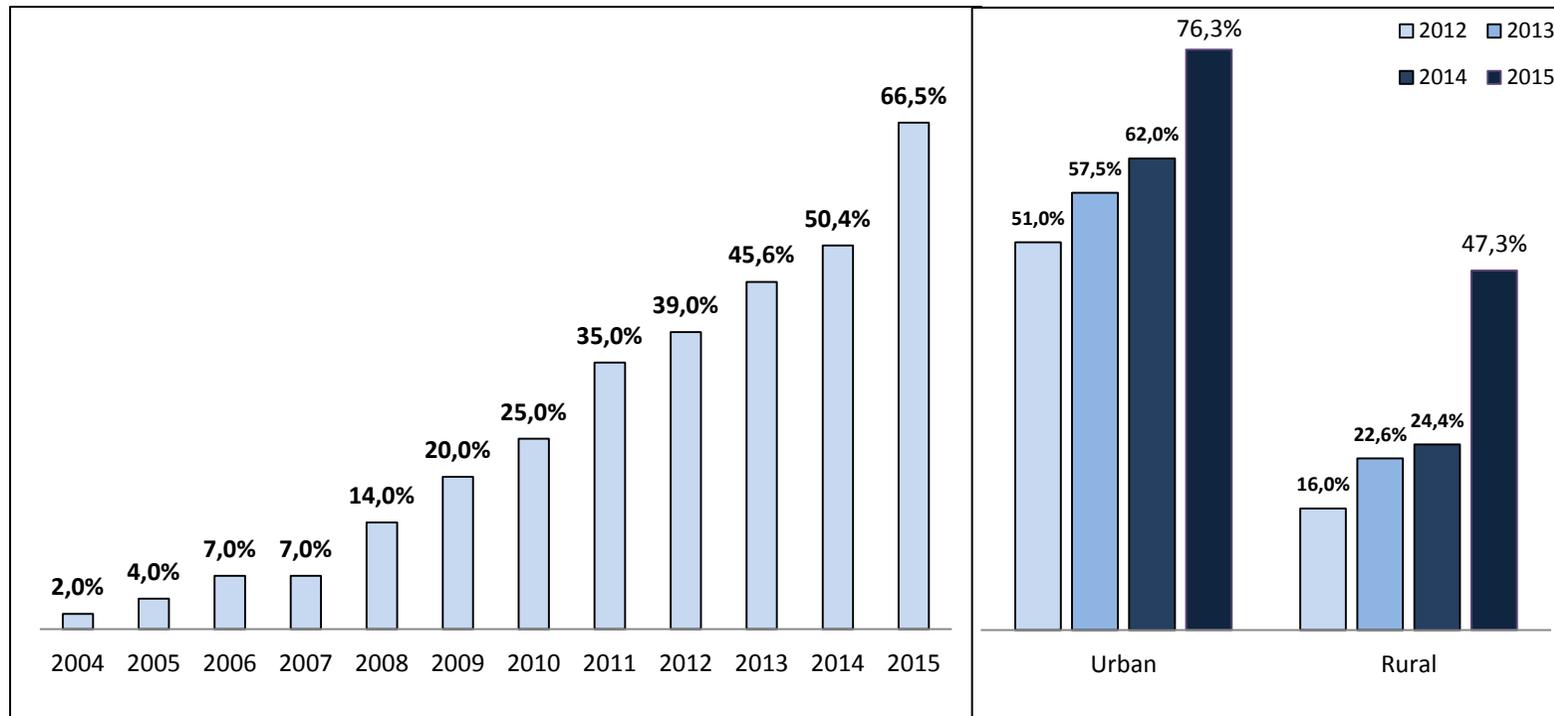
(% of individuals aged 5 years and older in e.a. ; 2015)



6 | INTERNET EQUIPMENT AND USAGE

- 66,5% of households have Internet access. More than three-quarters of urban households are equipped with Internet access (76,3%) against 47,3% for households in rural area. Internet equipment shows a considerable increase in both areas between 2014 and 2015.

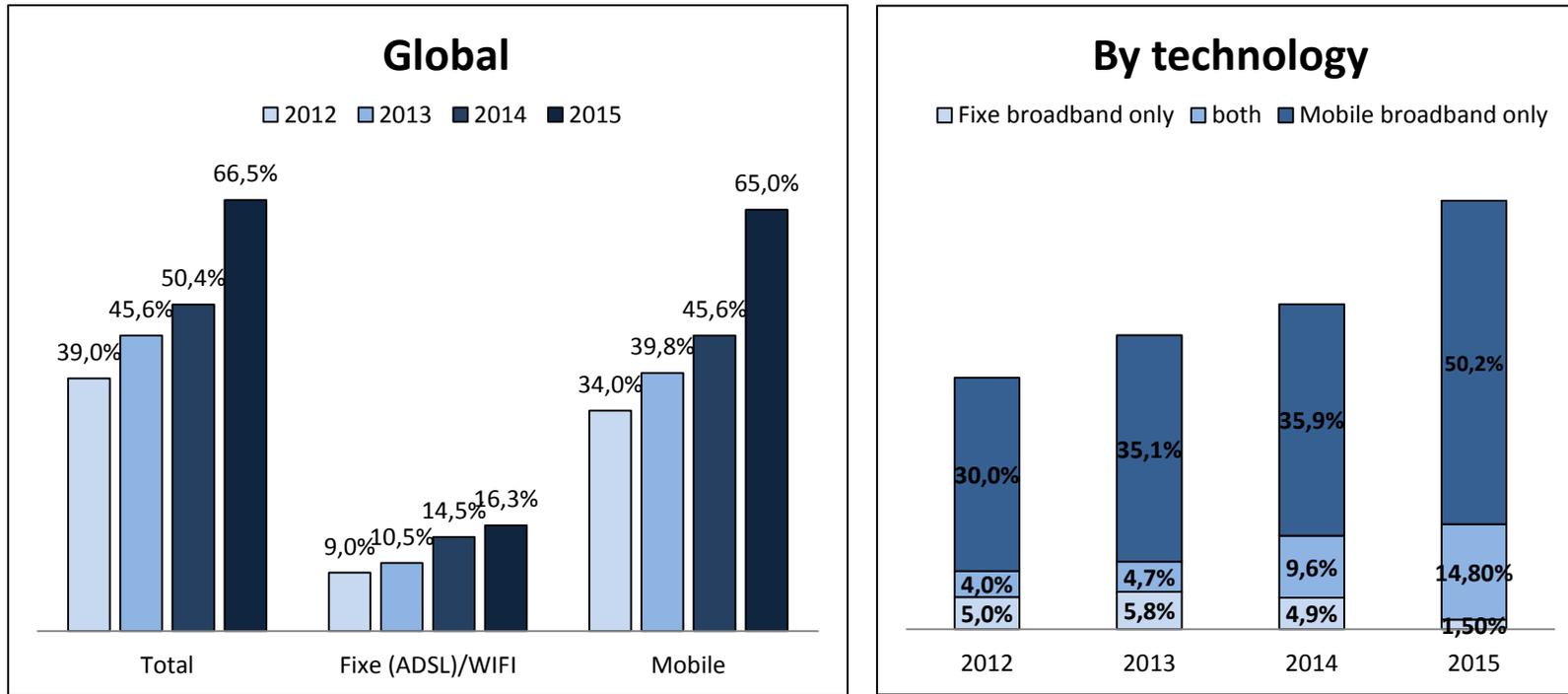
INTERNET EQUIPEMENT (% of Households in e.a.)



- Mobile Internet access increased from 45,6% in 2014 to 65,0% in 2015 while fixed Internet access (ADSL)/WiFi increased from 14,5% to 16,3% during the same period.

INTERNET EQUIPMENT

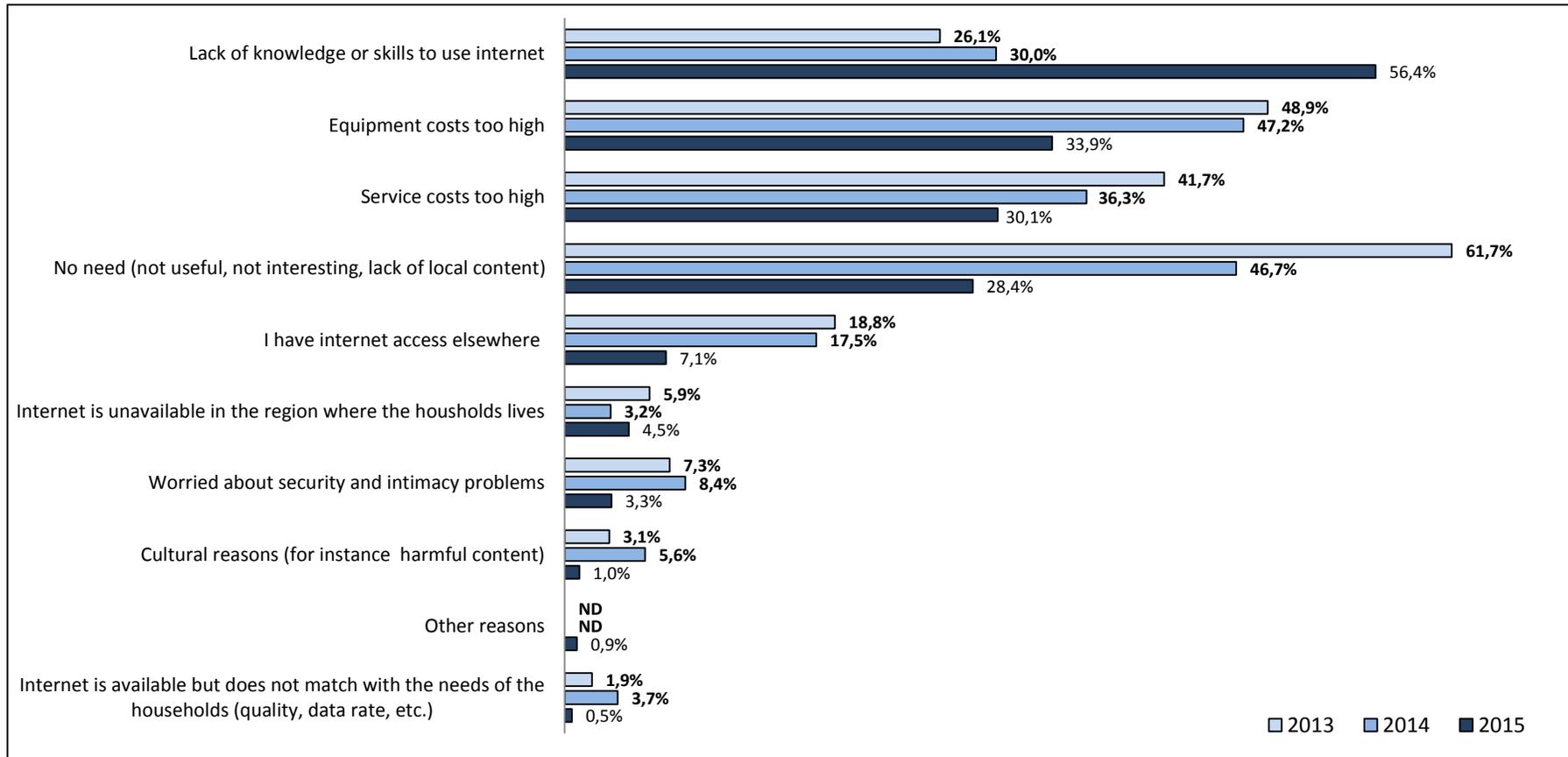
(% of Households in e.a.)



- The lack of knowledge or skill, the cost of equipment or service and the lack of need are the main barriers for households equipment with Internet access.

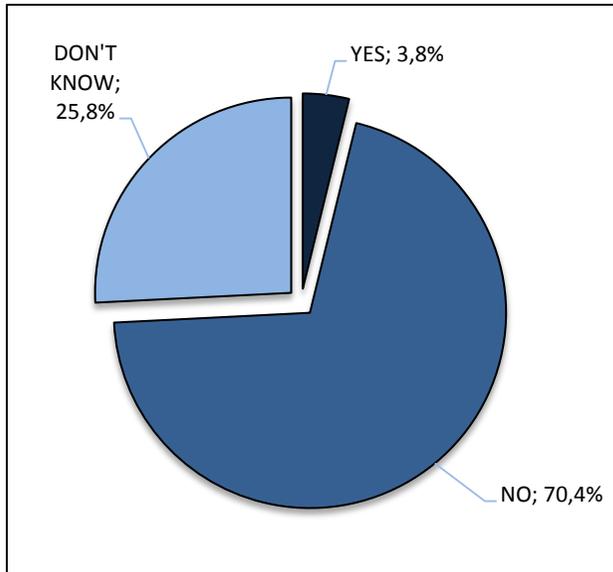
BARRIERS FOR INTERNET EQUIPMENT IN HOUSEHOLDS

(% of Households not equipped with Internet)

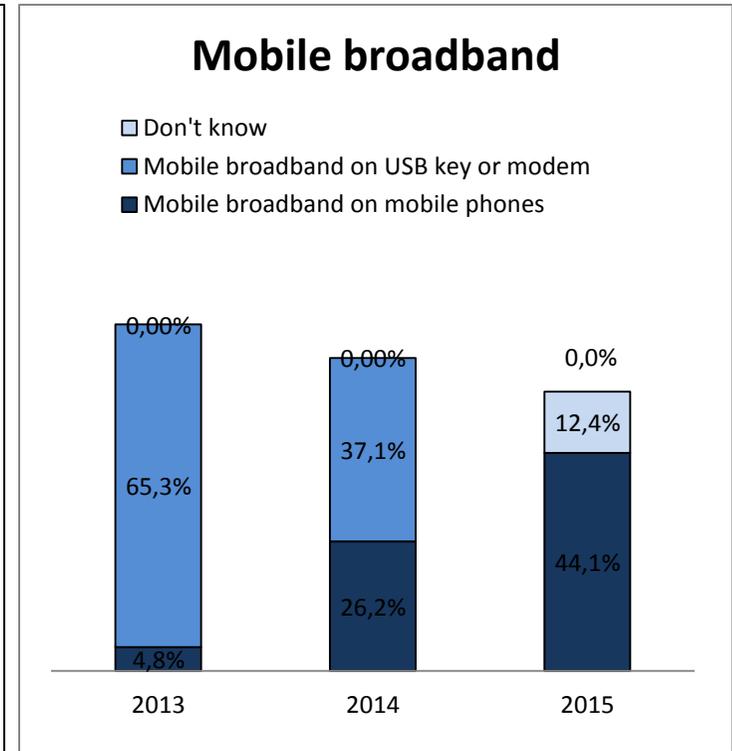
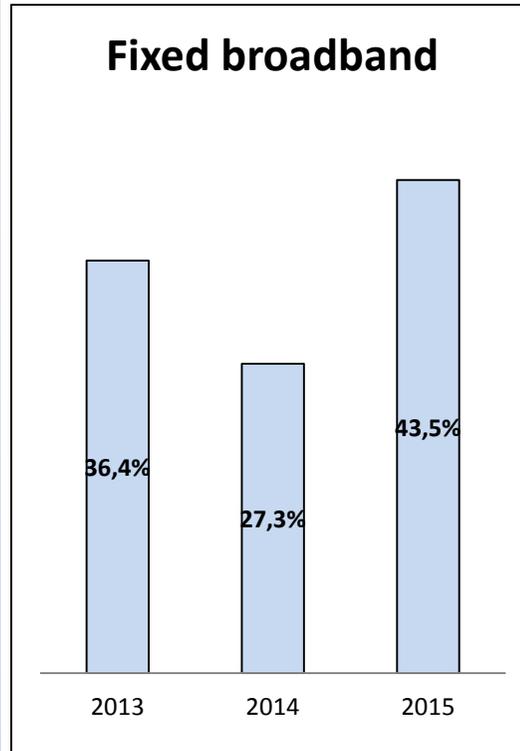


- 3,8% of non-equipped households with Internet access intend to get equipped within the next 12 months. 43.5% among them intend to get equipped with fixed internet access and 44.1% of them with mobile internet access on mobile phones.

INTENTION OF INTERNET EQUIPEMENT
(% of households not equipped with internet)



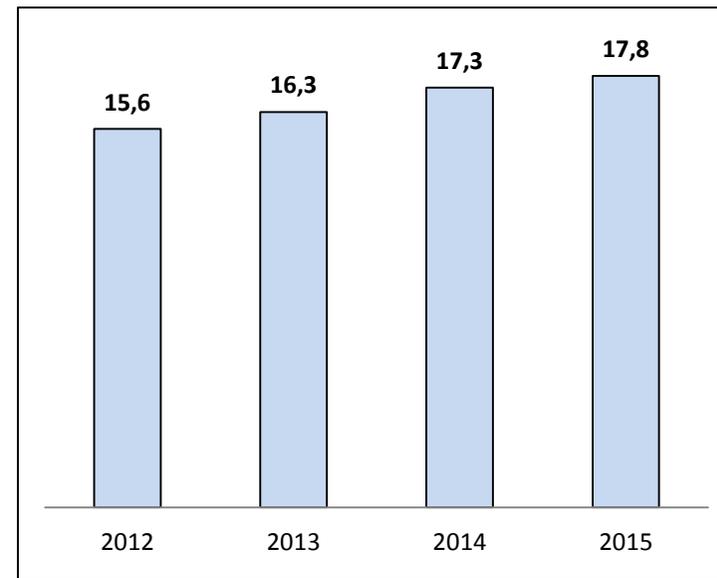
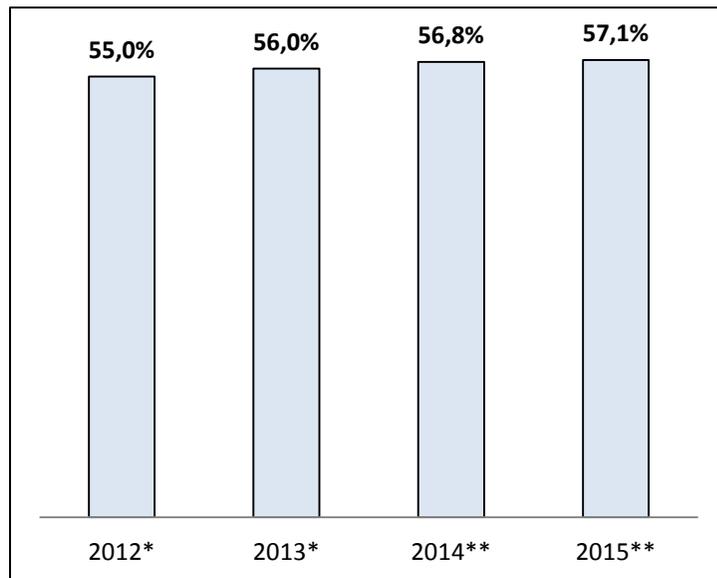
INTENTION OF EQUIPEMENT IN THE NEXT 12 MONTHS BY TYPE OF EQUIPMENT
(% of households not equipped with internet who intend to get equipped)



- 17.8 millions of Moroccan aged 5 years and older have got connected to the Internet in the last three months of 2015. The proportion of Internet users has increased compared to 2014 rising from 56.8% to 57.1% in 2015.

INTERNET USERS

(% of individuals aged 5 years and older in e.a.)

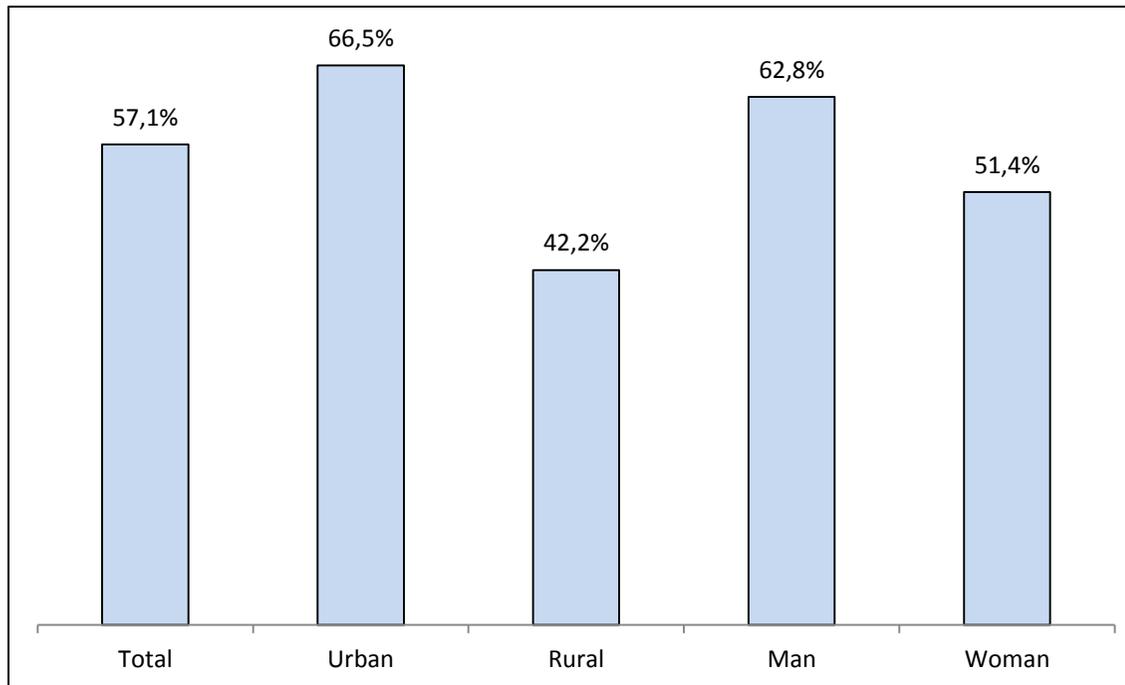


* Internet users during the 12 last months ** Internet users during the 3 last months

- Two of three individuals in urban area and four of ten in rural area have accessed the Internet during the last three months of 2015. According to gender, 62.8% of men and 51.4% of women have accessed the Internet during the same period.

INTERNET USERS DURING THE THREE PAST MONTHS IN 2015

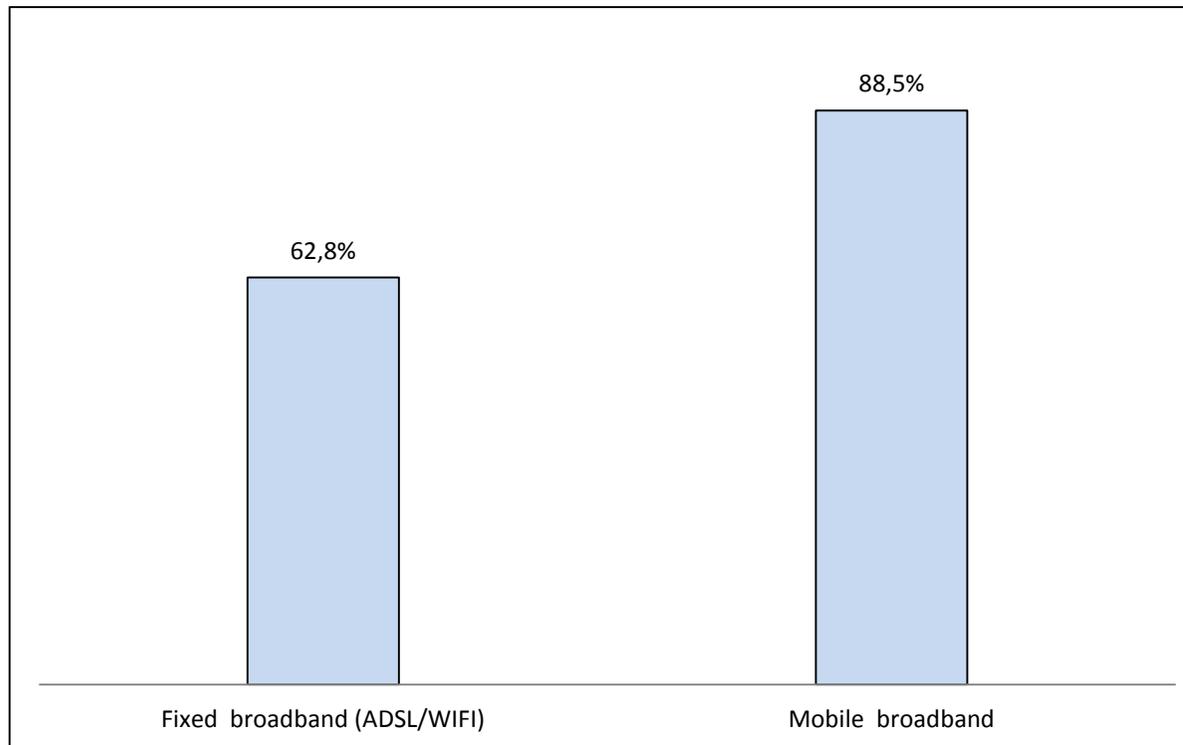
(% Of individuals aged 5 years and older in e.a.)



- **88,5% of Internet users accessed the internet through the mobile broadband network and 62.8% through the fixed broadband network (ADSL/WiFi).**

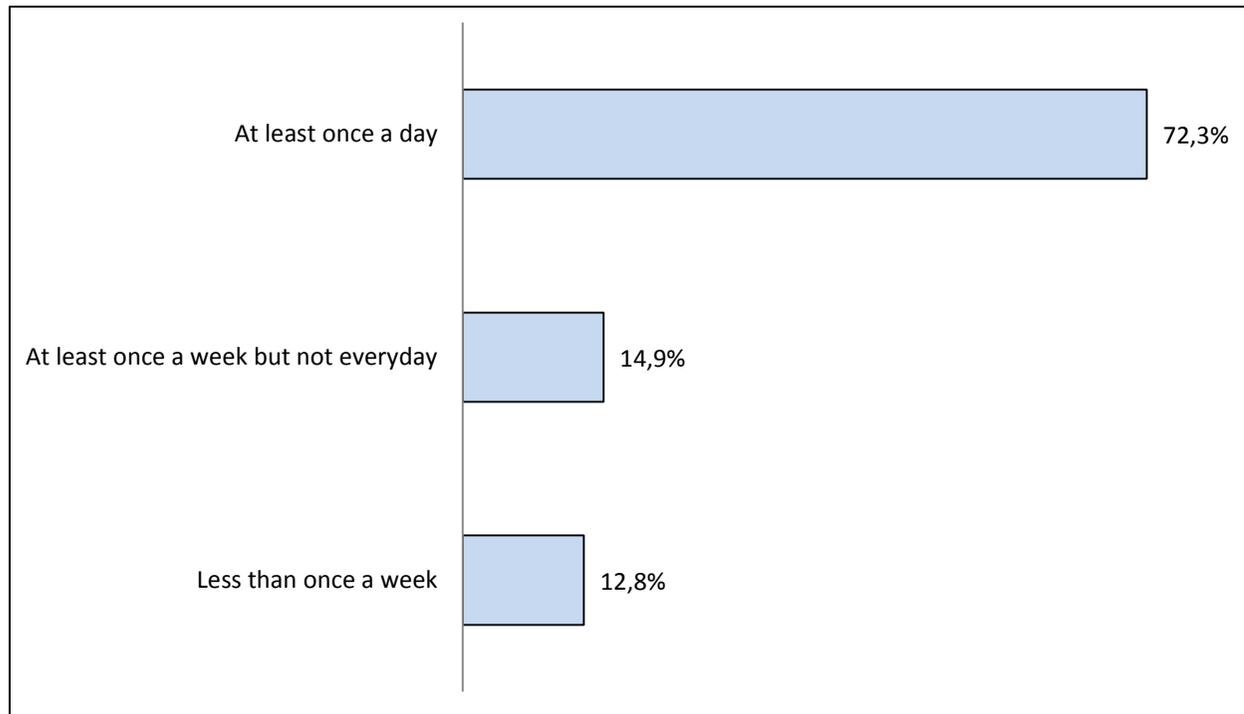
TYPE OF CONNEXION USED IN THE LAST THREE MONTHS

(% Internet users aged 5 years and older in 2015)



- 72,3% of Internet users accessed the Internet at least once a day, while 14,9% accessed the Internet at least once a week but not every day and 12,8% less than once a week.

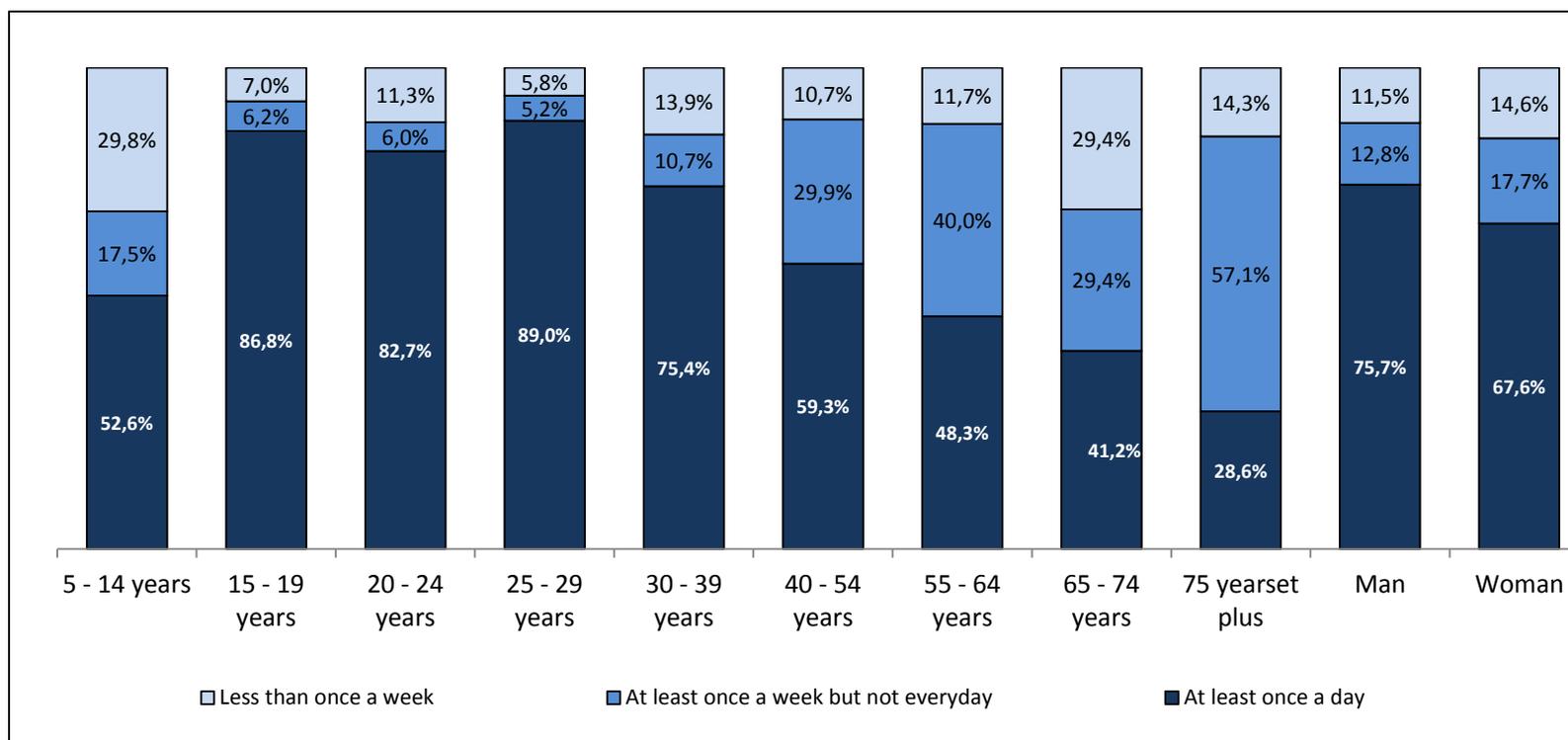
INTERNET CONNECTION FREQUENCY DURING THE LAST 3 MONTHS IN 2015
(% Internet users 5 years and older)



- The daily internet access is high among all age groups from 5 to 54 years and the highest rates are registered among internet users aged from 15 to 29 years. This frequency of internet use decreases as the age increases. Men connect more frequently than women (respectively 3/4 and 2/3).

INTERNET CONNECTION FREQUENCY DURING THE LAST 3 MONTHS IN 2015

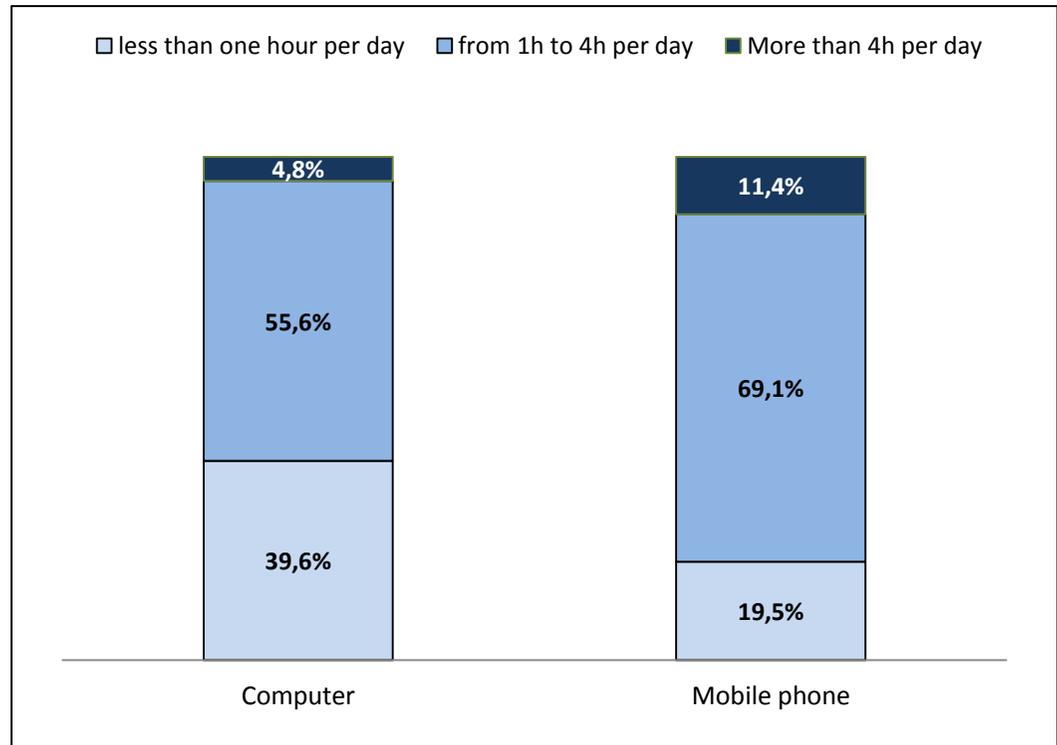
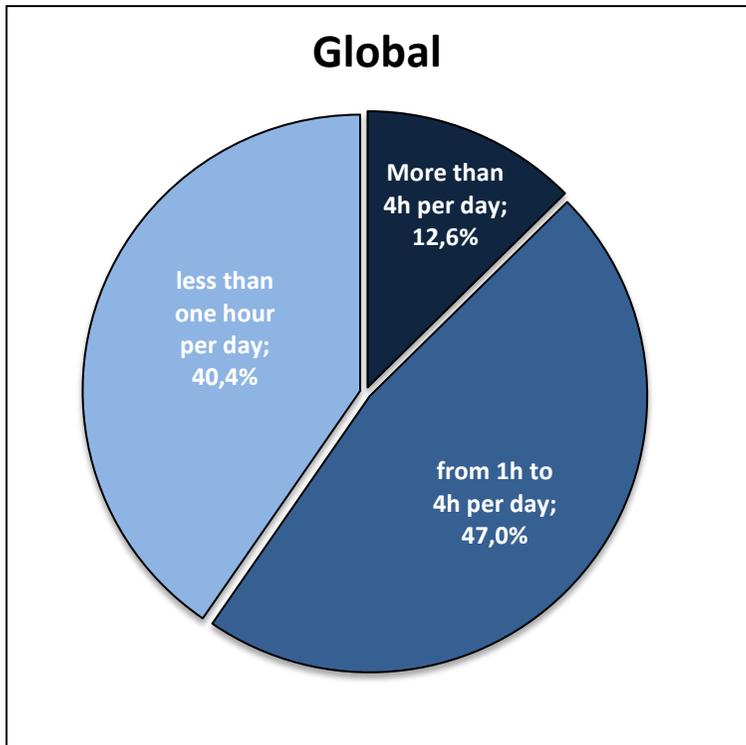
(% Internet users 5 years and older in 2015)



- Nearly half of Internet users spend between 1 and 4 hours per day on the Internet, while 40% of users log in for less than one hour a day. Only 13% spend more than 4 hours on the internet. 8 of 10 internet users spend over an hour connected to the Internet on the mobile phone. This proportion becomes 6 of 10 for computer / tablet.

DAILY CONNEXION TIME ON THE INTERNET

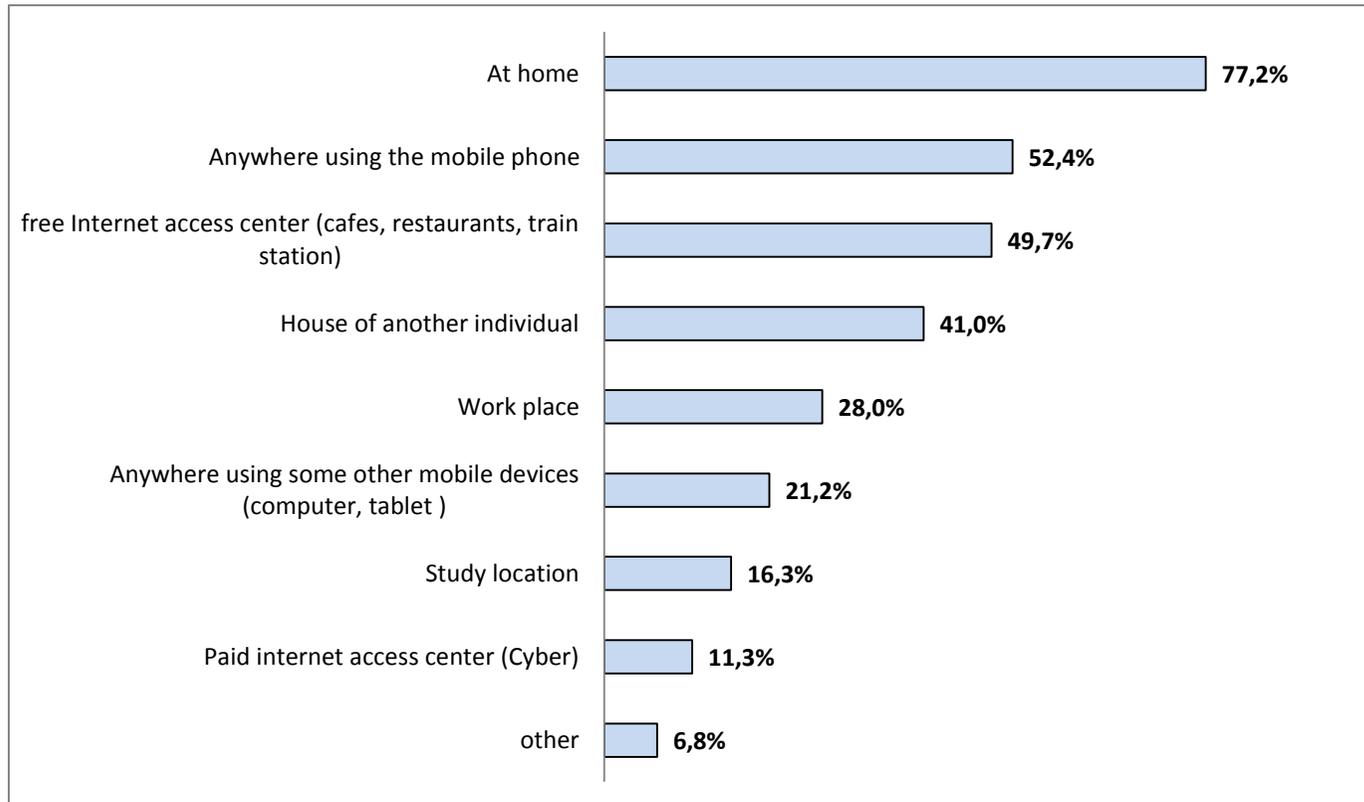
(% of Internet users aged 5 years and older during the last three months; 2015)



- 77.2% of internet users accessed the Internet from home, and to a lesser extent, from any location via a mobile phone, from a free Internet access center or the house of another individual.

INTERNET CONNECTION LOCATION

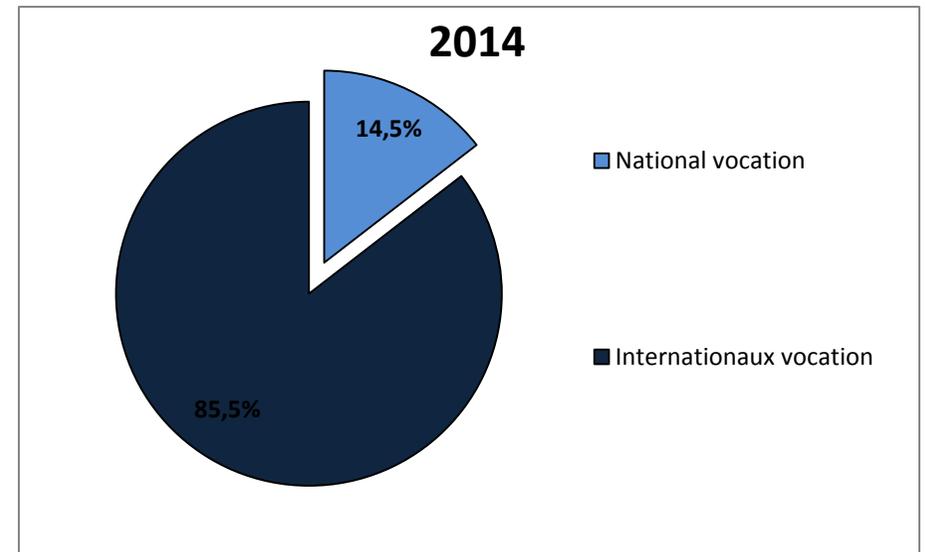
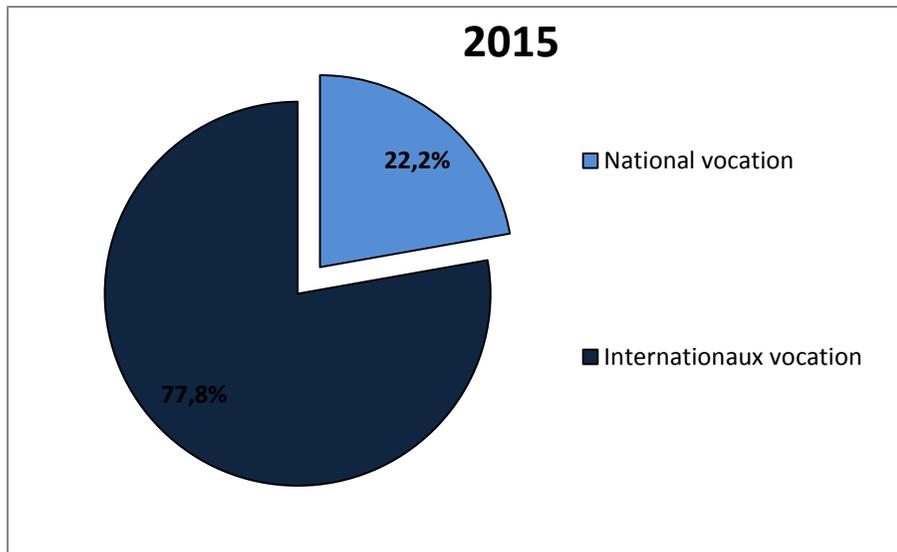
(% of Internet users aged 5 years and older during the last three months; 2015)



- Internet users accessed international websites (77.8%) more than national ones (22.2%).
- The proportion of Internet users visiting the national sites has increased compared to 2014.

THE MOST WEB SITES VISITED BY INTERNET USERS

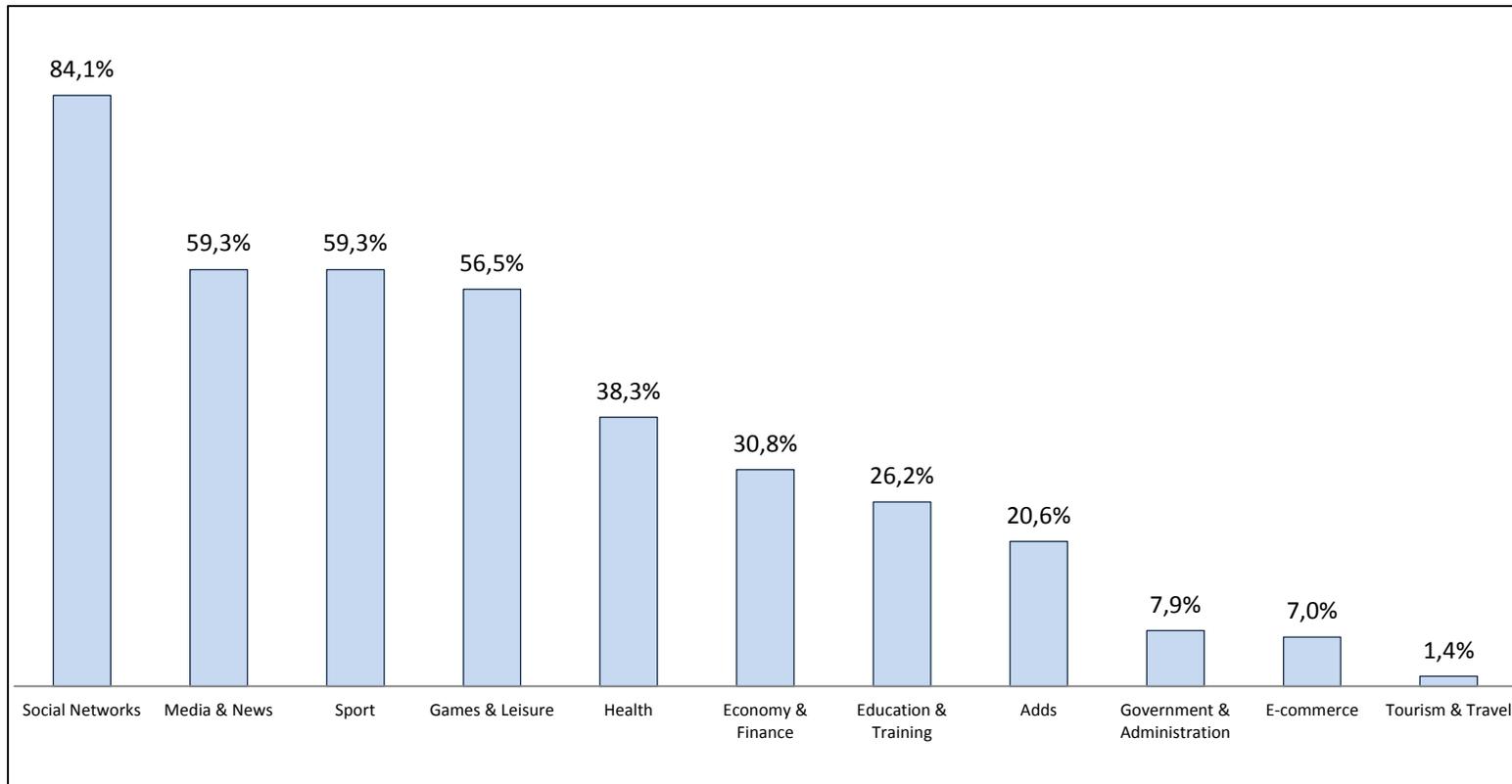
(% internet users aged 5 years and older in e.a.)



- **Social networks, media and news, sports and gaming and leisure represent the favorite content for Internet users. Follows successively health, economy and finance, education and training and Ads.**

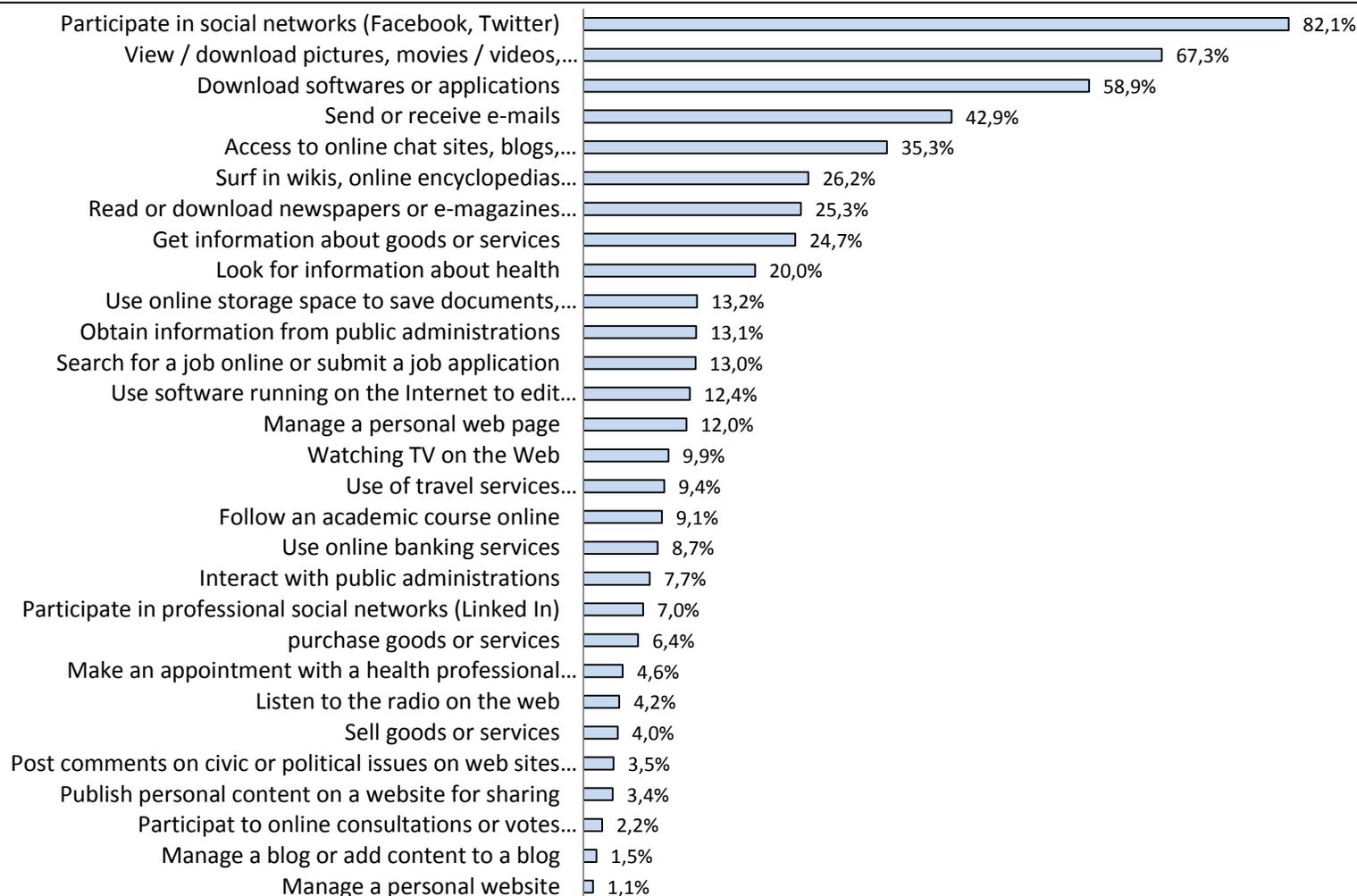
INTERNET USERS' FAVORITE CONTENTS BY TYPE

(% of Internet users aged 5 years and older during the last three months; 2015)



- Mainly, 82.1% of Internet users accessed the Internet to participate in social networks, 67.3% to watch and download multimedia content, 58.9% to download software and applications and 42.9% to use electronic messaging.

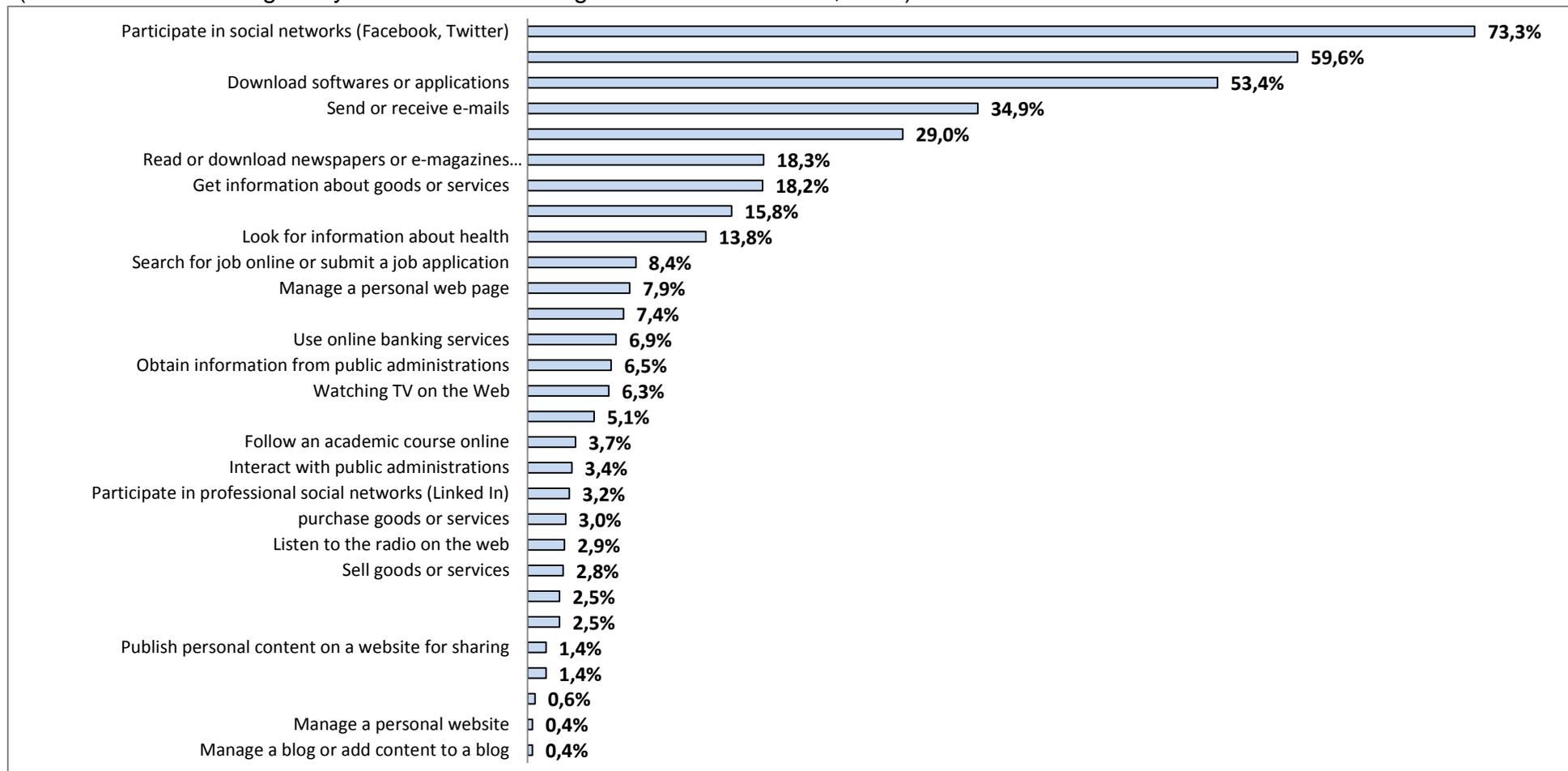
INTERNET USES (% of internet users aged 5 years and older during the last three months; 2015)



- **Social networks (73.3%), multimedia content (59.6%) are the most important content accessed on the Internet from the mobile phone. Follows in the third and the fourth positions software and applications downloading (53.4%) and emails exchange (34.9%).**

INTERNET USES ON MOBILE PHONE

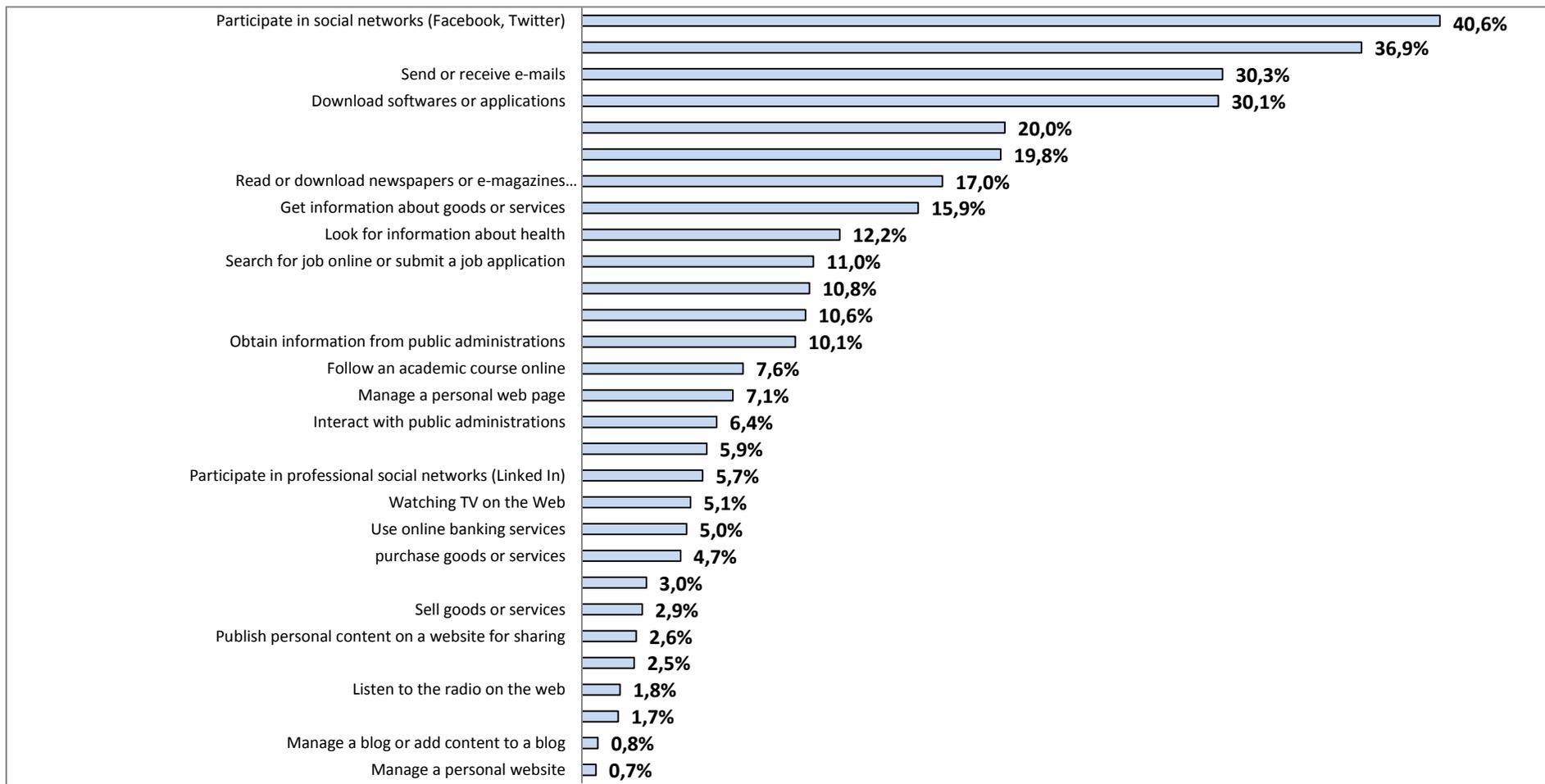
(% of Internet users aged 5 years and older during the last three months; 2015)



- **Social networks, multimedia contents and software are the most important uses of the internet on the computer/tablet with 40.6% and 36.9% respectively. E-mail exchange or software and applications downloading have similar proportions (30%).**

INTERNET USES FROM COMPUTER / TABLET

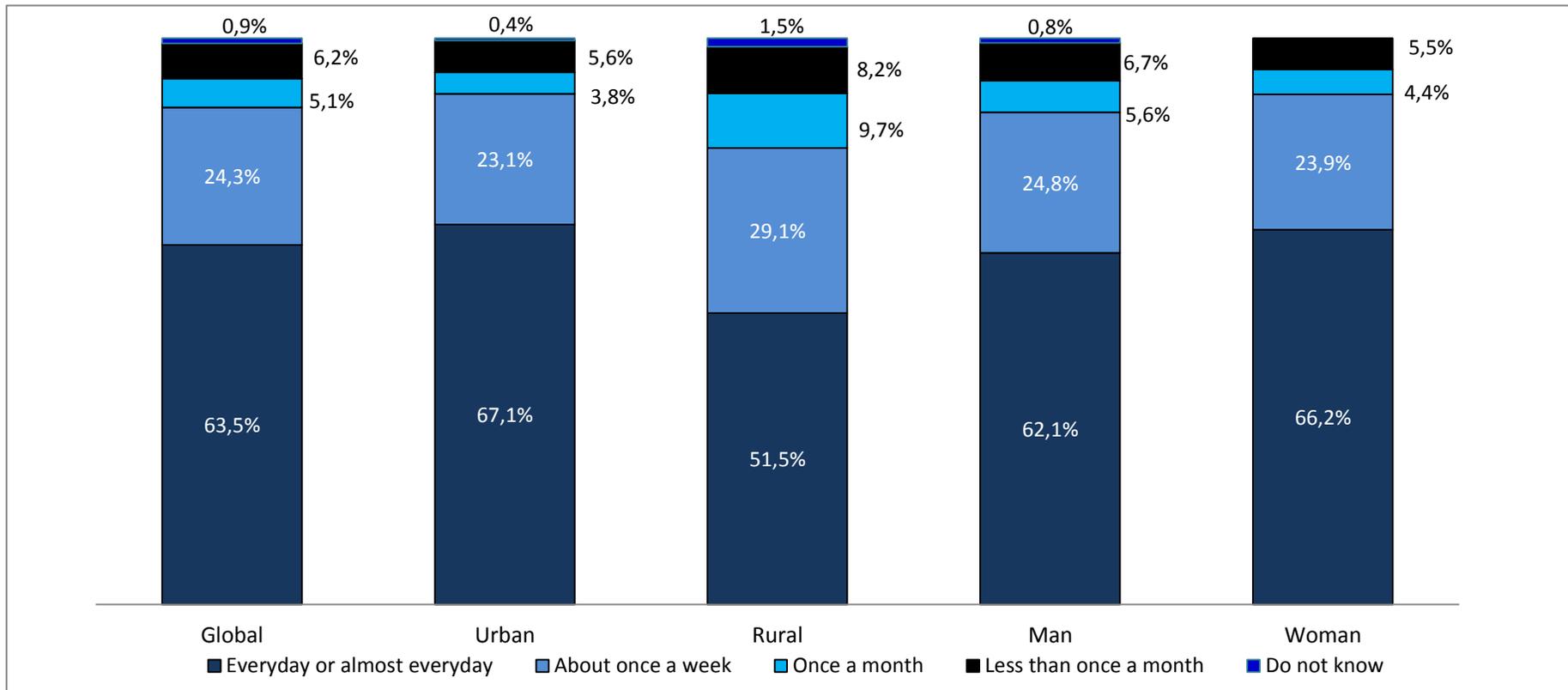
(% of internet users aged 5 years and older during the last three months; 2015)



7 | SOCIAL NETWORKS

- Nearly two of three social networks users surf daily on social networks. In urban area, this proportion is slightly above two thirds (67.1%).
- In rural area, this proportion is slightly more than half of social networks users (51.5%).
- According to gender, it is revealed that women access social networks daily relatively more than men.

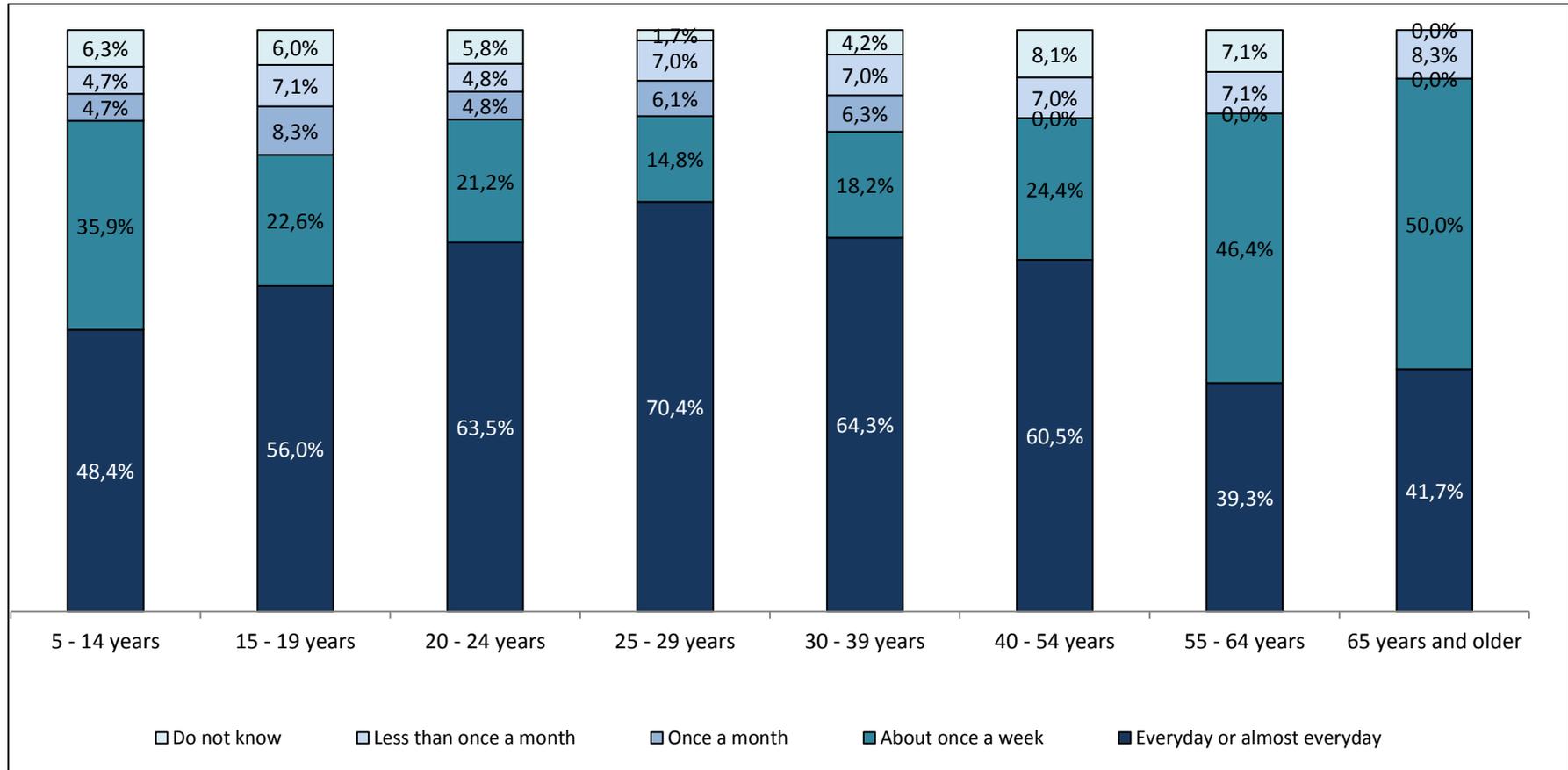
Frequency of social network use during the last three months
(Social networks users 5-75 years)



- Daily access to social networks is greater for the young people aged from 15 to 29 years and it is less for individuals aged 40 years and older.

SOCIAL NETWORK'S FREQUENCY OF USE

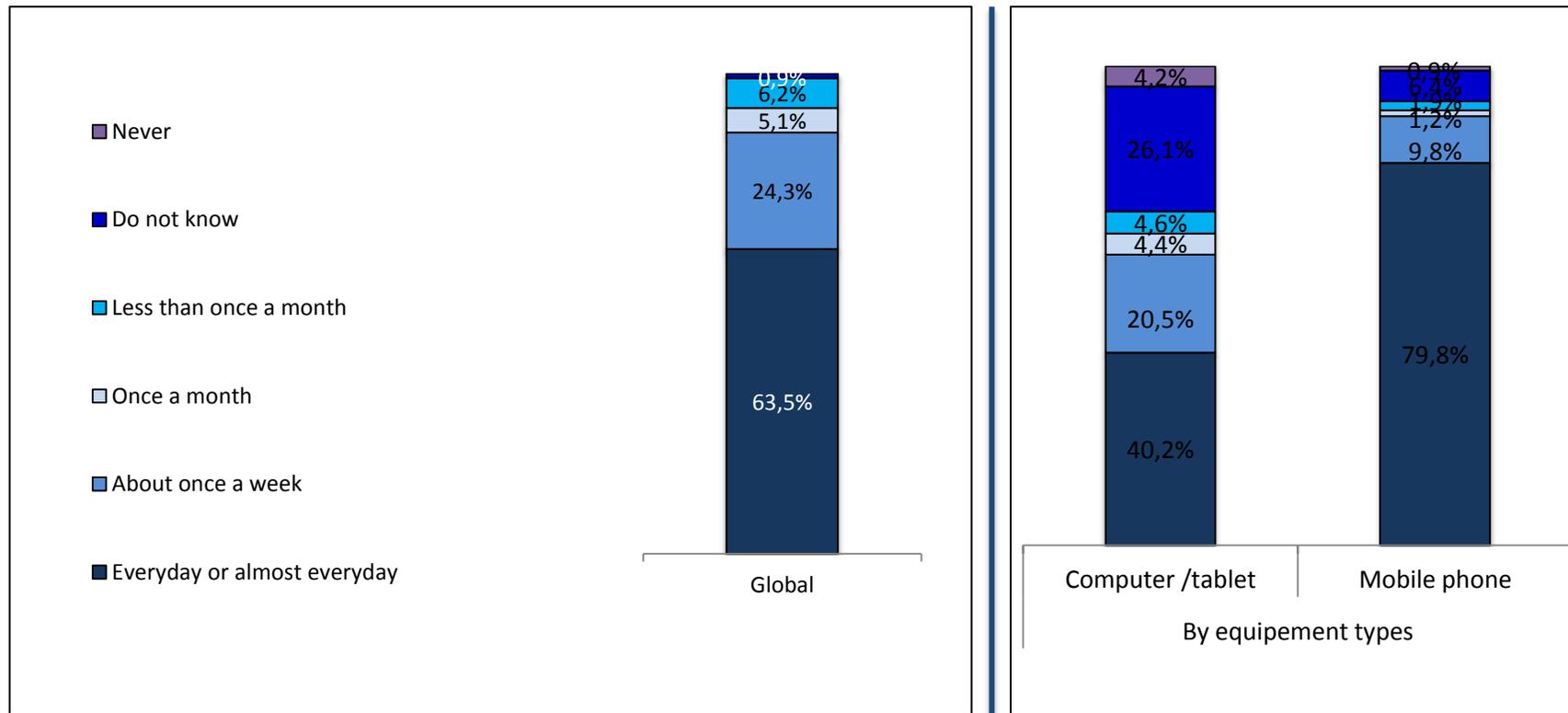
(Social networks users 5 years and older during the last three months 2015, in e.a.).



- The mobile phone is largely the most used device for accessing social networks, with 79,8% users who access them every day or almost. Only four of ten Internet users access social networks through a computer/tablet.

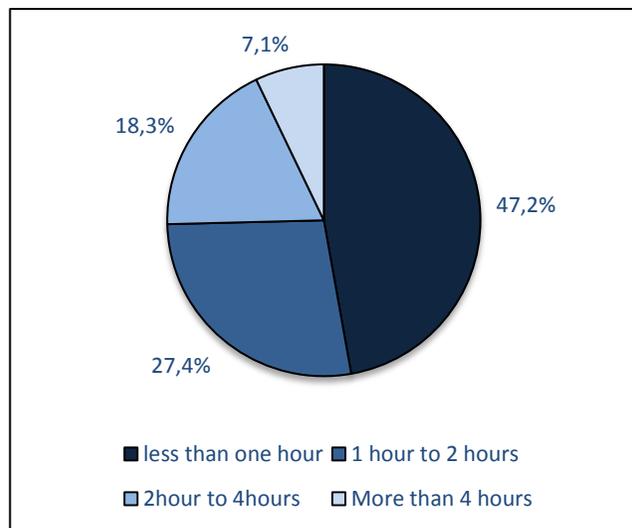
SOCIAL NETWORK'S FREQUENCY OF USE BY TYPE OF EQUIPEMENT

(Social networks users 5 years and older during the last three months 2015, in e.a.).

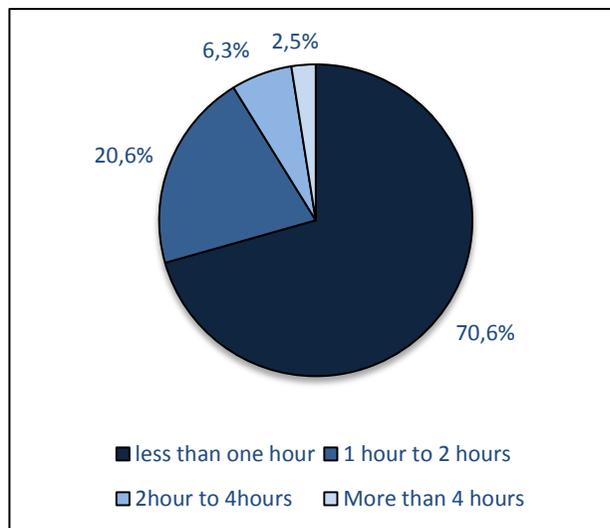


- 52.8% of Internet users spend more than an hour on social networks. Nearly three-quarters of Internet users spend less than two hours each time they access social networks regardless the access device.
- 70.6% of social networks users spend an average duration of less than one hour through the computer/tablet, while a little more than half of Internet users spend more than one hour on their mobile phones.

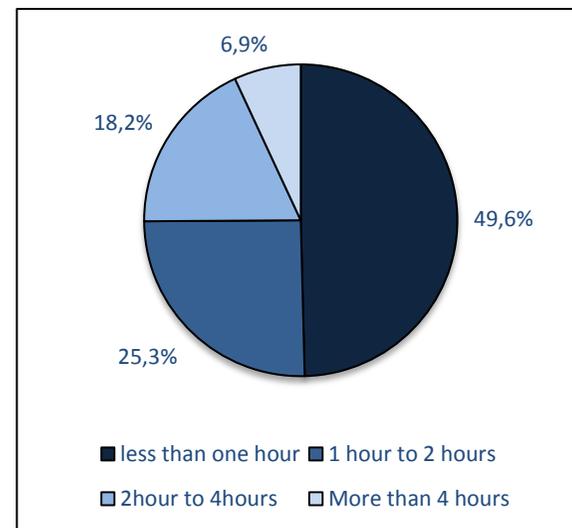
TOTAL TIME OF SOCIAL NETWORK USE
(Social networks' users 5 years and older)



TOTAL TIME OF SOCIAL NETWORK USE FROM COMPUTER / TABLET
(Social networks' users 5 years and older)



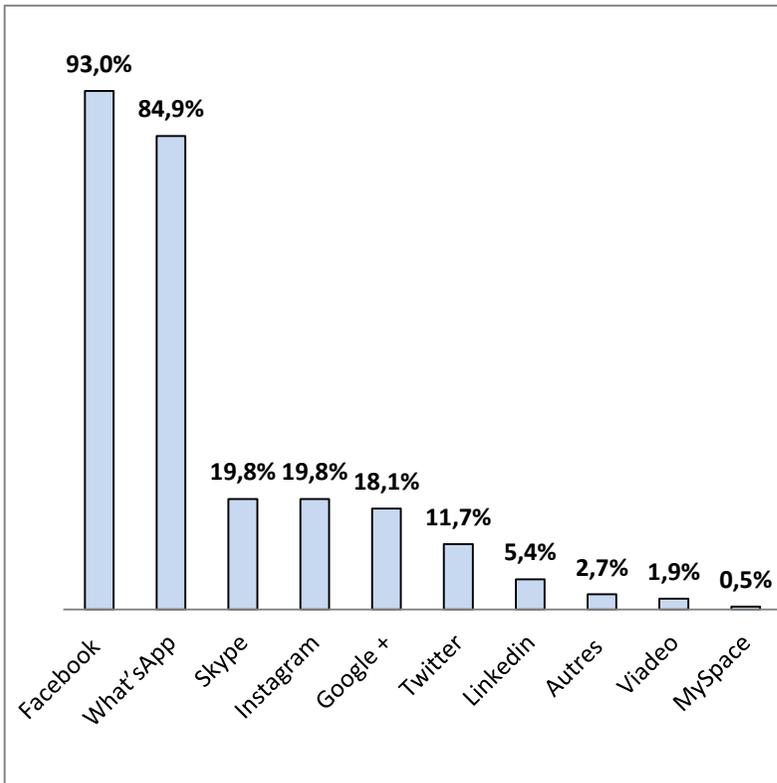
TOTAL TIME OF SOCIAL NETWORK USE FROM MOBILE PHONE
(Social networks' users 5 years and older)



- **Nine of ten social networks regular users connect to Facebook and nearly 85% to What'sApp.**
- **About six of ten social networks users get connected in order to keep in touch with friends or family, learn, share, or view pictures or videos and make comments.**

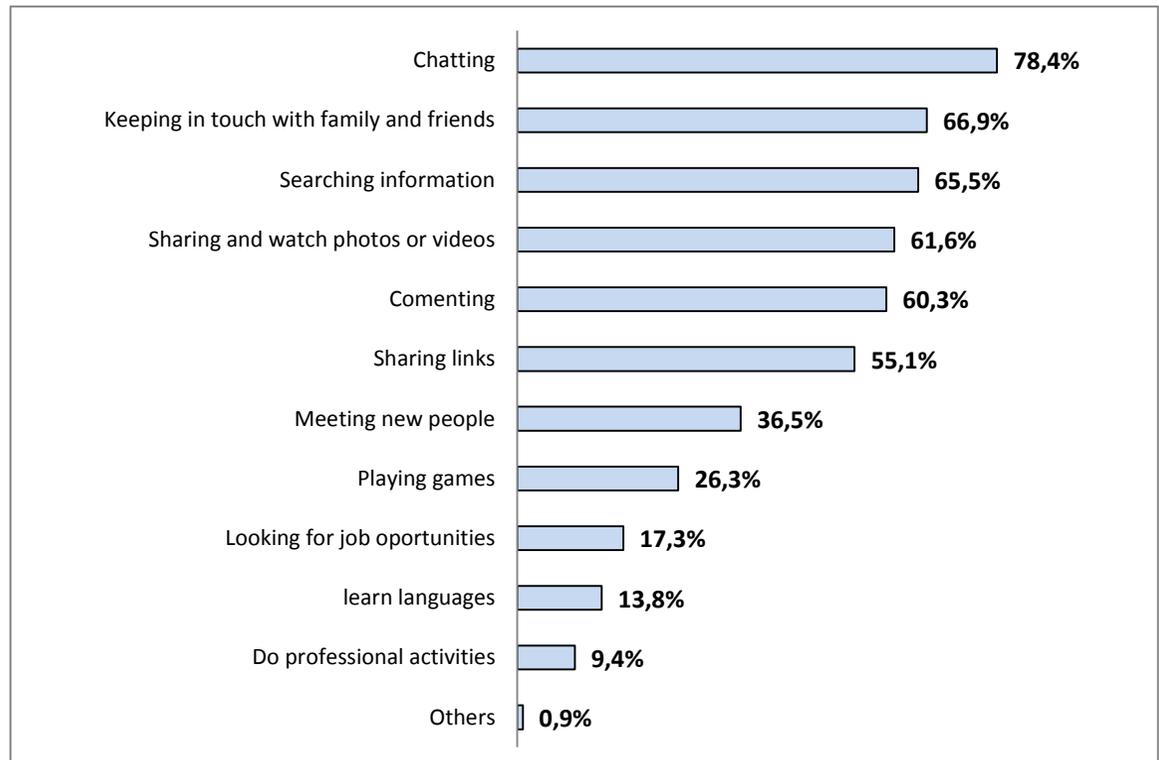
MOST USED SOCIAL NETWORKS

(Social networks users 5 years and older 2015, in e.a.).



MAIN USES OF SOCIAL NETWORKS

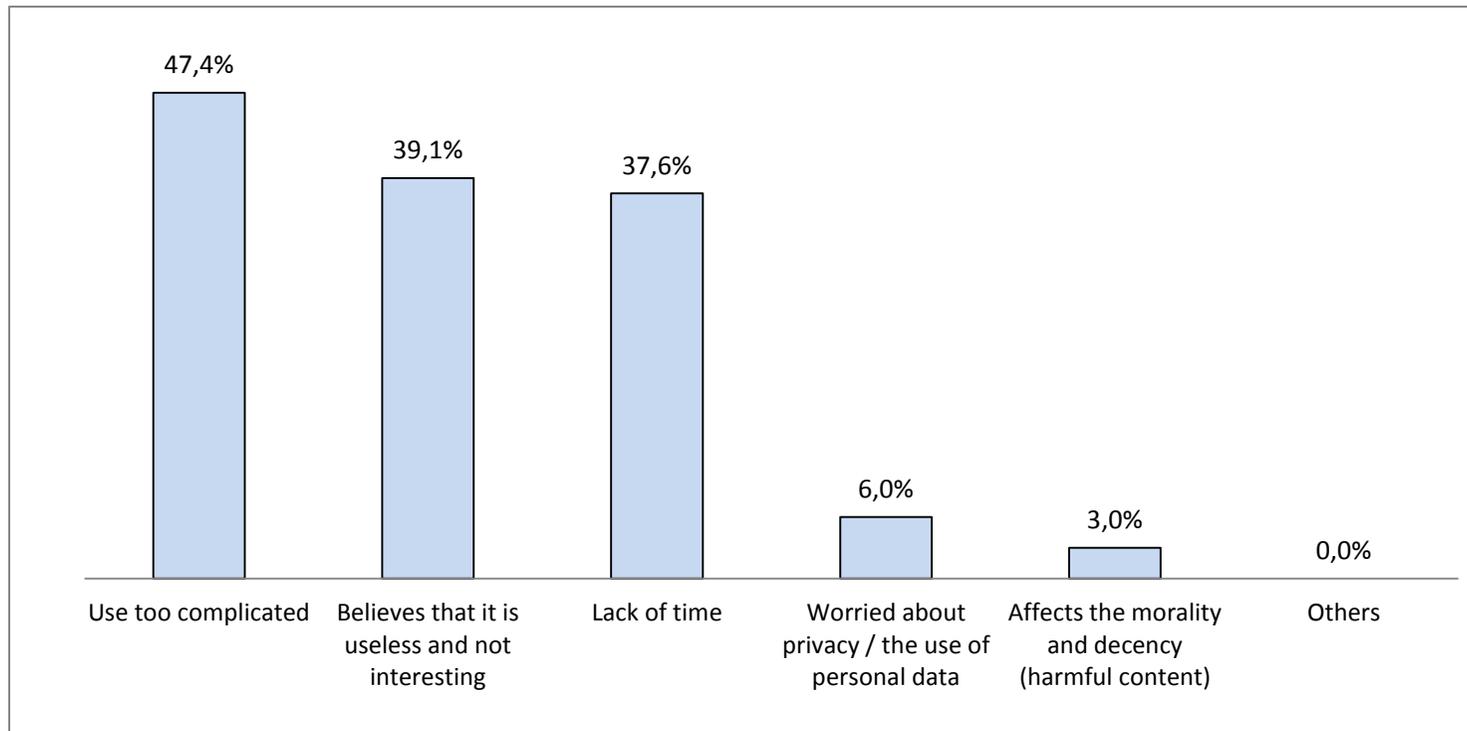
(Social networks users 5 years and older 2015, in e.a.).



- The main reported barriers to social networks use are the complicated use (47.4%) and the lack of interest (39.1%). Follows the lack of time (37.6%) and the other barriers were reported with low proportions.

MAIN BARRIERS TO SOCIAL NETWORKS USE

(% Internet users who don't access social networks aged five and older)

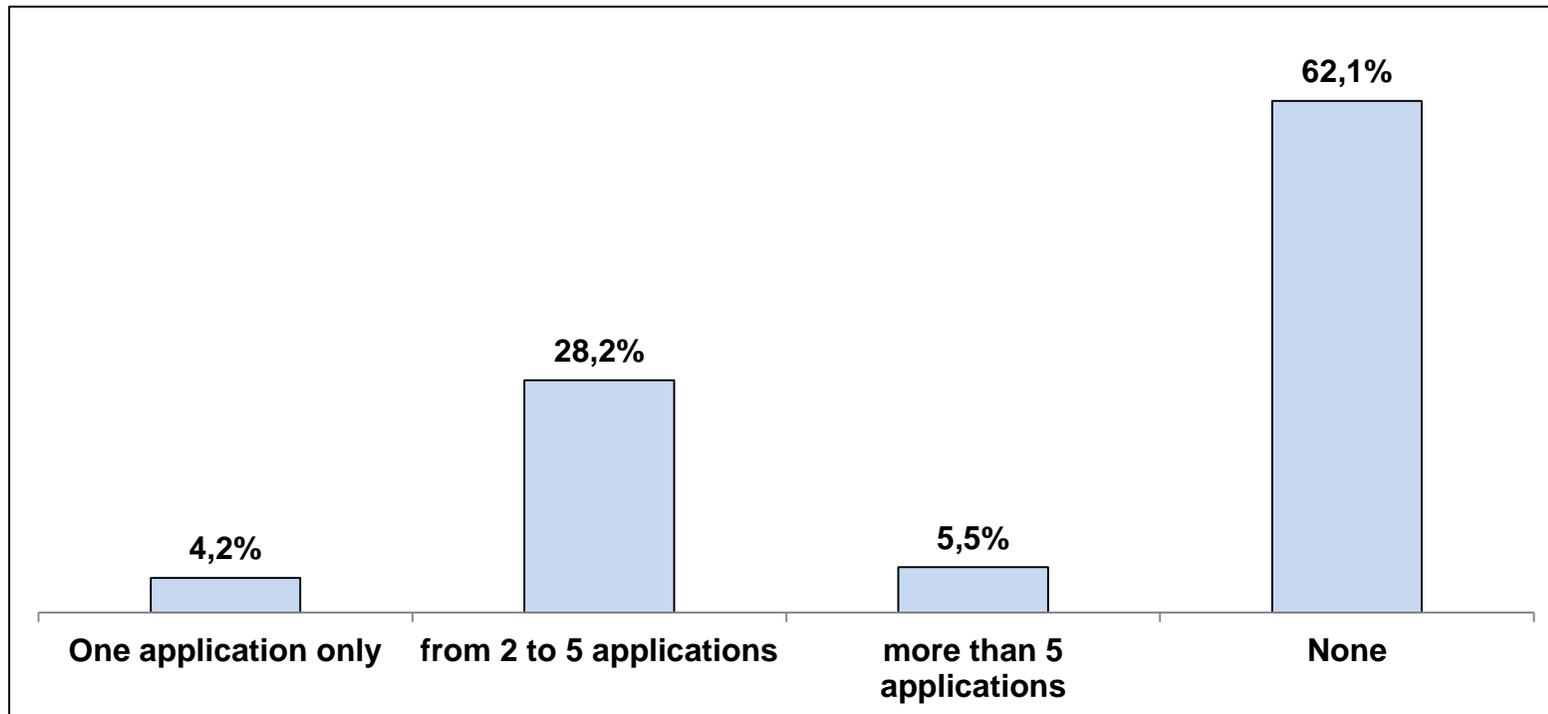


8 | MOBILE APPLICATIONS

- One of three individuals is accustomed to frequent use of mobile applications per week.
- Nearly 3 of 10 individuals use 2 to 5 mobile applications and 62,1% have no frequent use of mobile applications per week.

NUMBER OF FREQUENTLY USED MOBILE APPLICATIONS PER WEEK

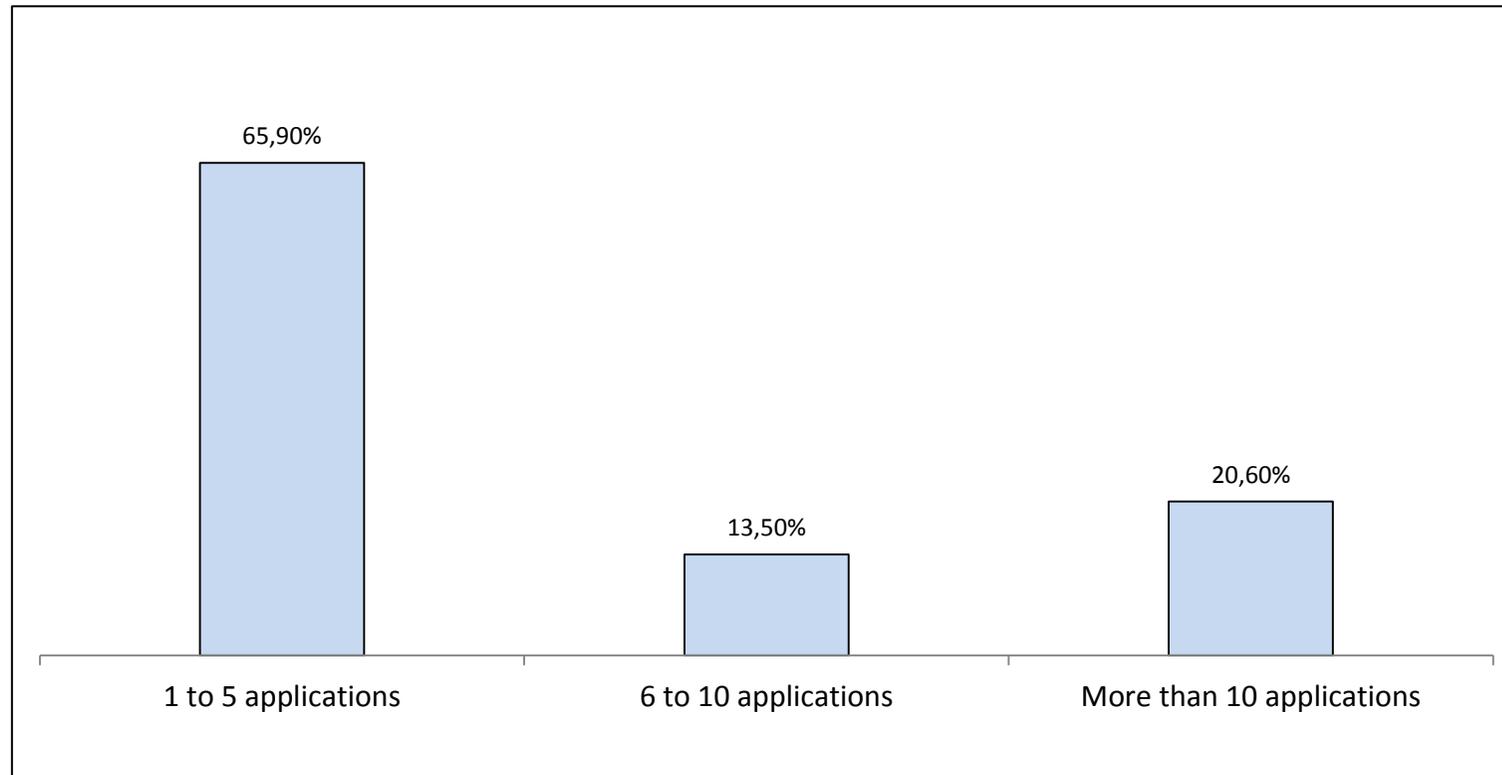
(Individuals 12-65 years)



- 65,9% of the mobile applications users have a download frequency of one to five applications, 13,5% has six to ten applications, and in one out of five cases more than ten applications.

NUMBER OF MOBILE APPLICATION DOWNLOADED DURING THE LAST THREE MONTHS 2015

(Mobile application users 12-65 years)



- 7 of 10 mobile applications users use it to access social networks. Follows the games and entertainment applications (14%), health applications (6.9%) and education and studies mobile applications (4.2%).

TYPE OF USED MOBILE APPLICATION

(Mobile application users 12-65 years)

