

ICTs Usage in households and by individuals

2017

Results Synthesis

September 2018

Summary

A Context and Methodological Framework

B ICT Usage in Households

C ICT Usage by Individuals

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B ICT Usage in Households

C ICT Usage by Individuals

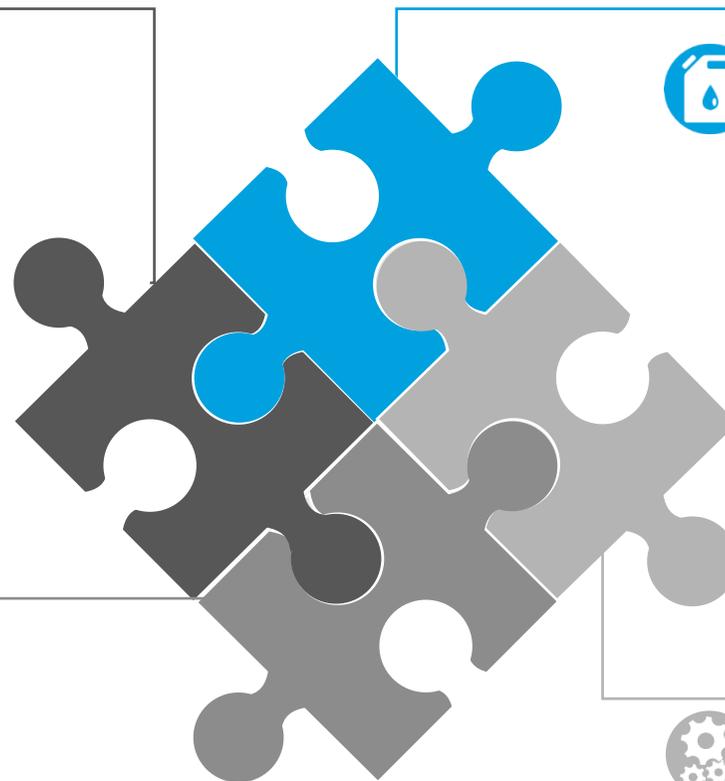
A context characterized by innovation and the strong dissemination of ICTs in society

Institutional innovations, the State of law is strengthened:

- Protection of freedom of speech and rights related to citizenship
- Development of e.gov
- Right to information and public data
- Advanced regionalization
- Reform of Justice: Independence of the judiciary and the prosecution



ICTs are spreading in all spheres of life of households, individuals and businesses.



Demographic and socio-economic societal innovations: A modernizing society:

- Demographic transition: extension of intermediate age groups (15-29 years)
- Reduction of household size
- Emergence of middle classes
 - 66.0% of revenues,
 - 65.5% of consumption spending,
 - 72.0% of savings.



Renovated geo-strategic positioning

- Morocco-Africa cooperation and common development
- Development of the financial hub (Casa City Finance)
- Development of advanced industrial platforms: Aeronautics, Electronics, Automotive



Five major objectives

1

Complete the information collected from operators for the fixed, mobile and Internet segments.

2

Identify ICT usage issues.

3

Analyze certain qualitative aspects.

4

Encourage a quantified knowledge of the condition and evolution of the information society in Morocco.

5

Feed international databases (including ITU databases that assess and compare the level of ICT development in countries at the international level).

A probability survey targeting more than 12,000 households and 12,000 individuals



Target 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.
- 12,000 households.
- 12,000 individuals.



Reference Population

The most recent Master-sample 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.



Period of completion

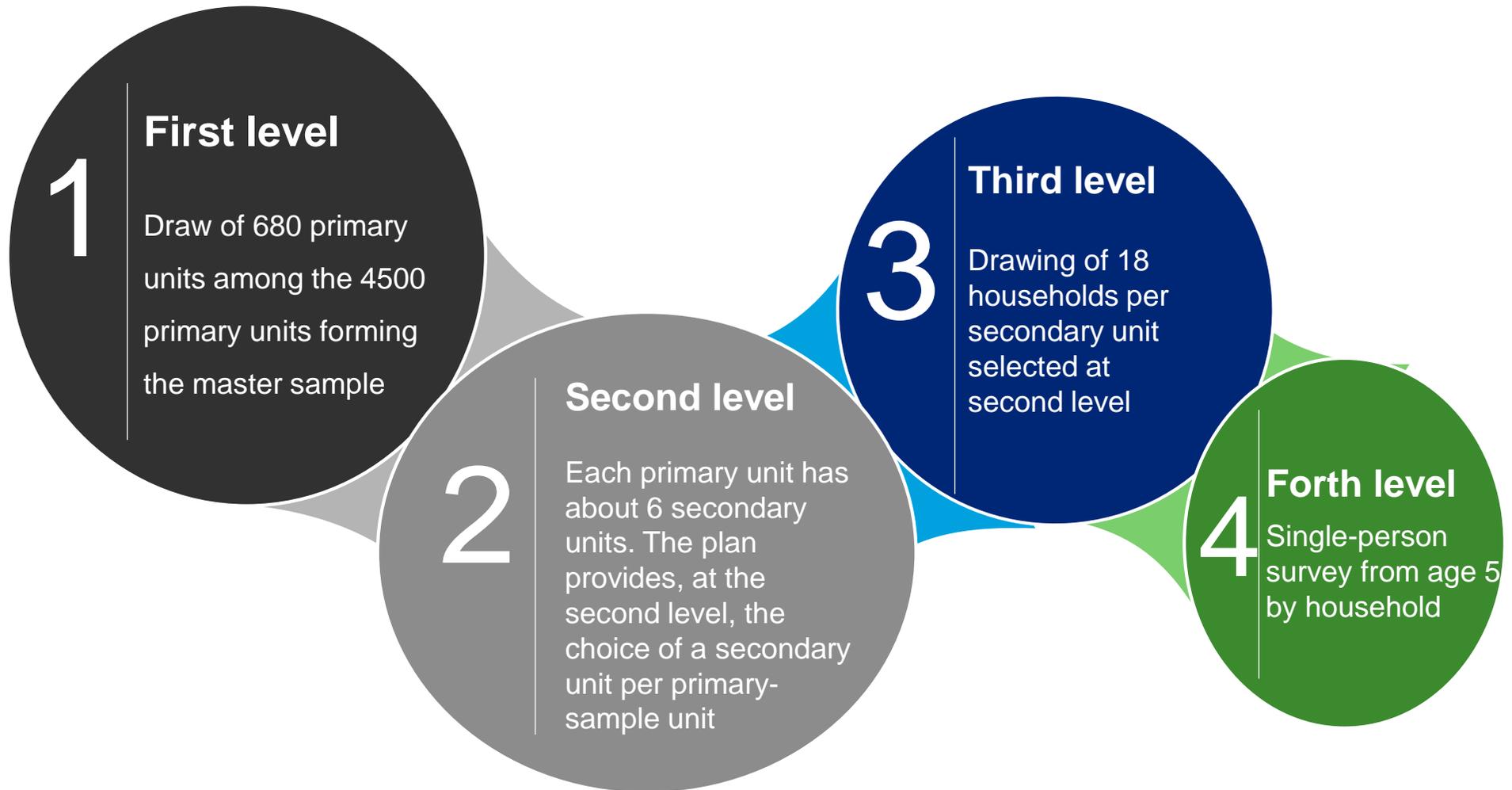
Data field collection from February 12 to March 12, 2018.



Reference Period

- 2017 for households' equipment and access.
- Last 3 months of 2017 for the individuals' equipment and usage.

A four-level stratified random draw performed by the HCP (stratification with respect to habitat strata to represent all socio-professional categories)



The observation of the average annual growth rate (AAGR) reveals the strong integration of ICT equipment in the daily life of Moroccans

Four observations :

1. The growth rate of Internet access in households is growing at a steady pace. It demonstrates a strong entry into the information society. Thus, Internet access in households has increased by 181% between 2010 and 2017.
2. With an increase of 72% between 2010 and 2017, the computer, led by laptops, shows that it is no longer an elite (or luxury) device but a fundamental good.
3. The AAGR is lower for mobile phone within individuals because it has reached saturation levels for many strata.
4. Smartphone equipment has increased by more than 500% from 2011 to 2017.



* Individuals aged 12 to 65 years old.

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2 Fixed Telephony

3 Computer and Tablet

4 Internet

5 Child Protection Online

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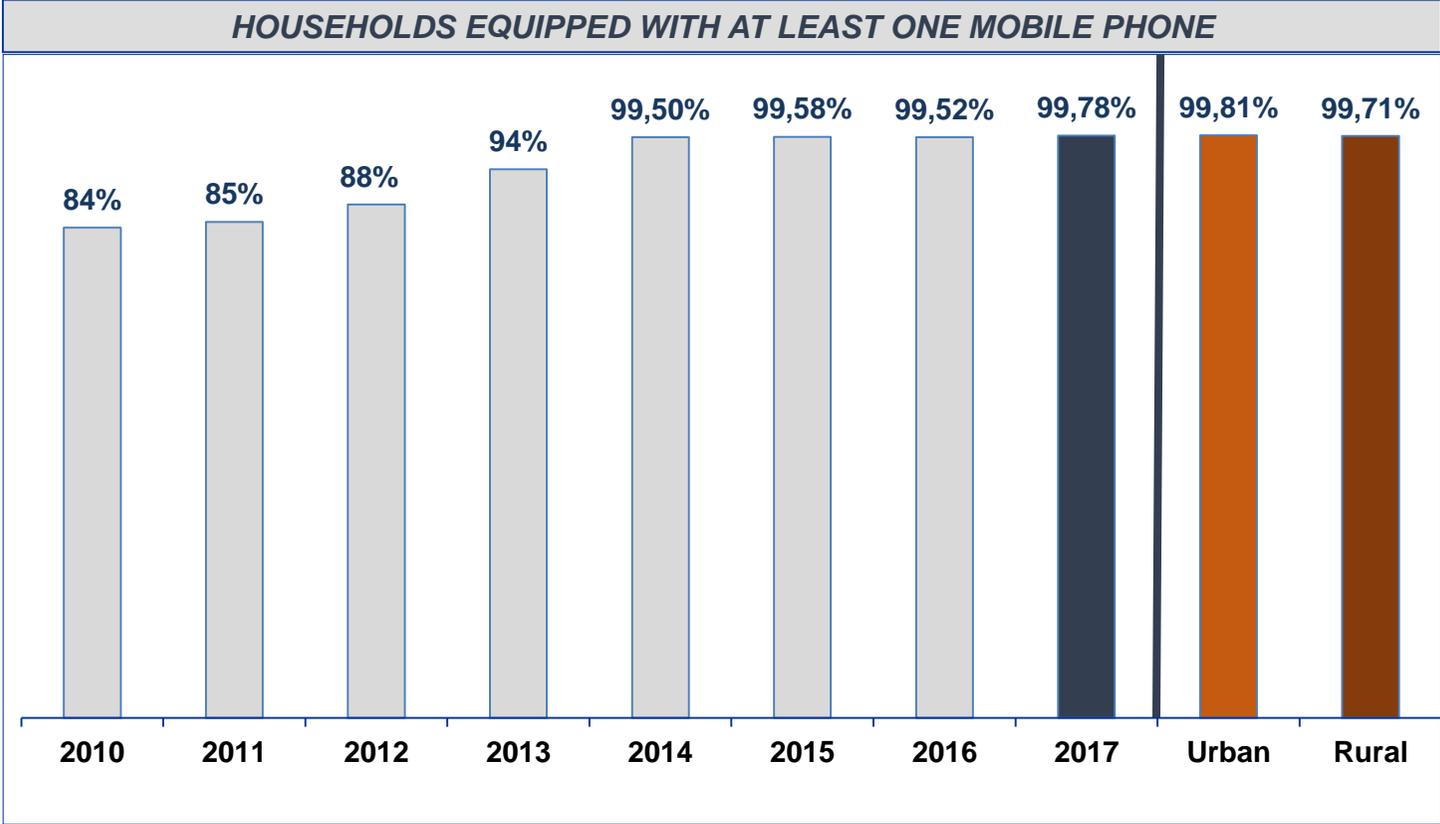
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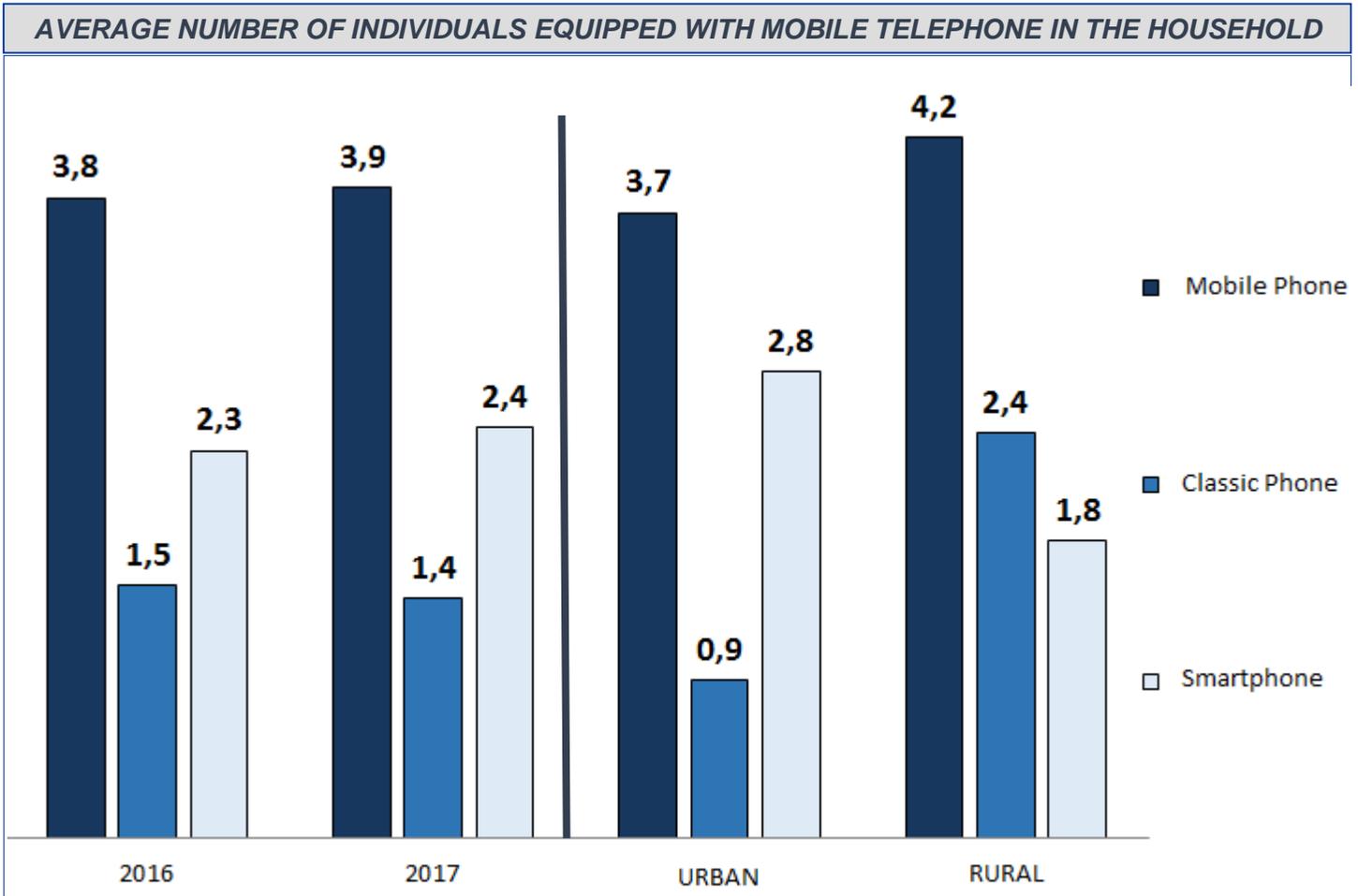
Mobile telephony is widespread for almost all households in both urban and rural areas

- The mobile market has reached maturity.
- In the future, we will be in a sort of technological transition (mobile phone) with a simple reproduction process. Only the numbers will change as a result of demographic change.



The average number of individuals in the household equipped with a mobile phone is 3.9

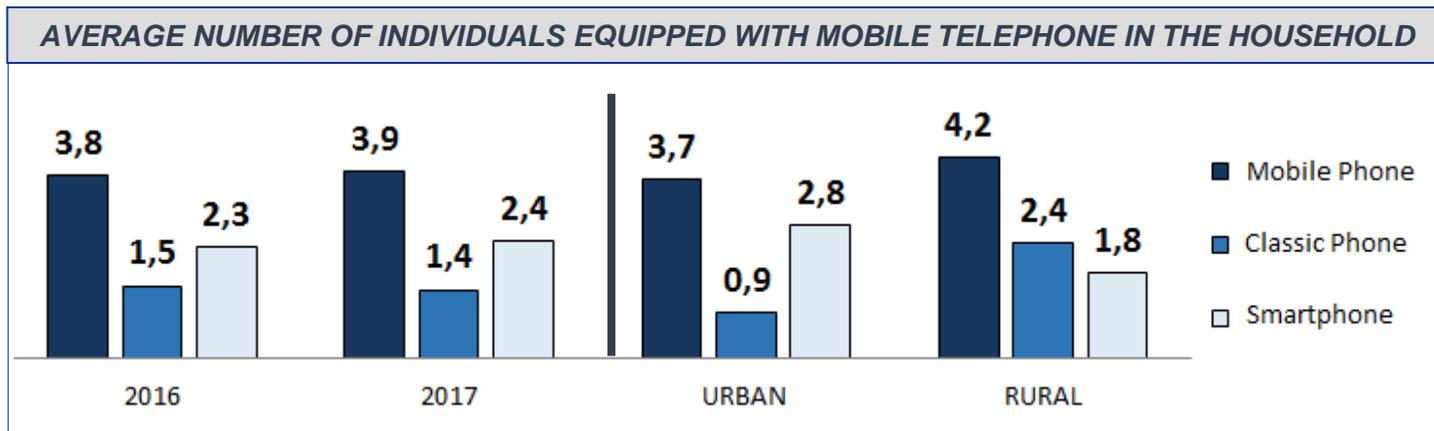
- This indicator should be interpreted by considering the household size.
- Thus, if the household equipment rate (at least one telephone) tends to stabilize, the number of individuals per household is still expected to grow.



The rate of mobile phone equipment in terms of number of individuals is expected to increase in the future, led by rural households

- The household equipment rate in terms of number of individuals in urban areas is 11 points higher than in rural areas.

- The highest number of rural-equipped individuals is explained by the household size of 5.17 in rural versus 4.07 in urban households.



THE POTENTIAL OF EQUIPMENT PER INDIVIDUAL IN THE RURAL AREA

	Equipped Individuals	Household Size	Equipment rate per Household
Urban	3,71	4,07	91%
Rural	4,16	5,17	80%
National	3,87	4,43	87%

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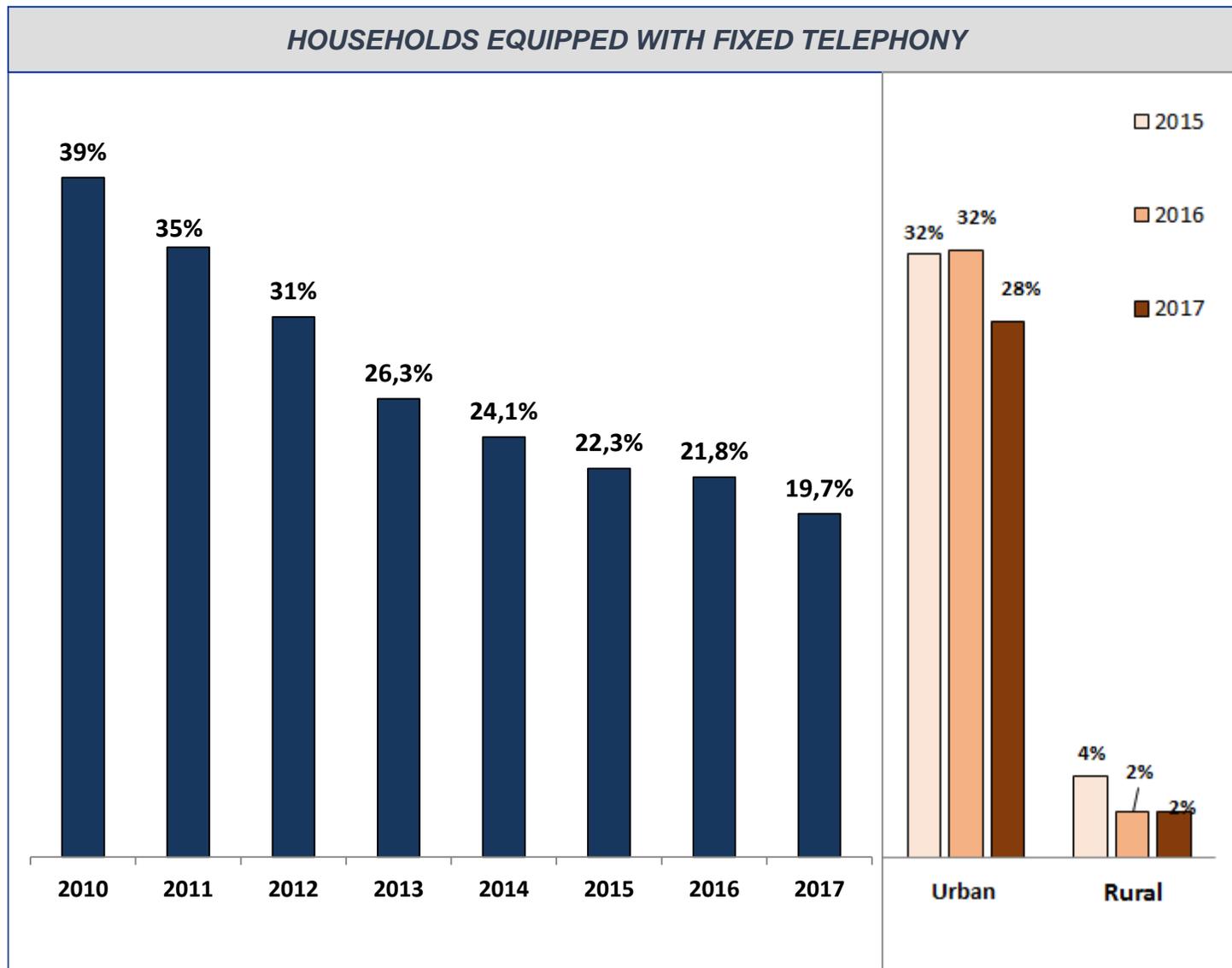
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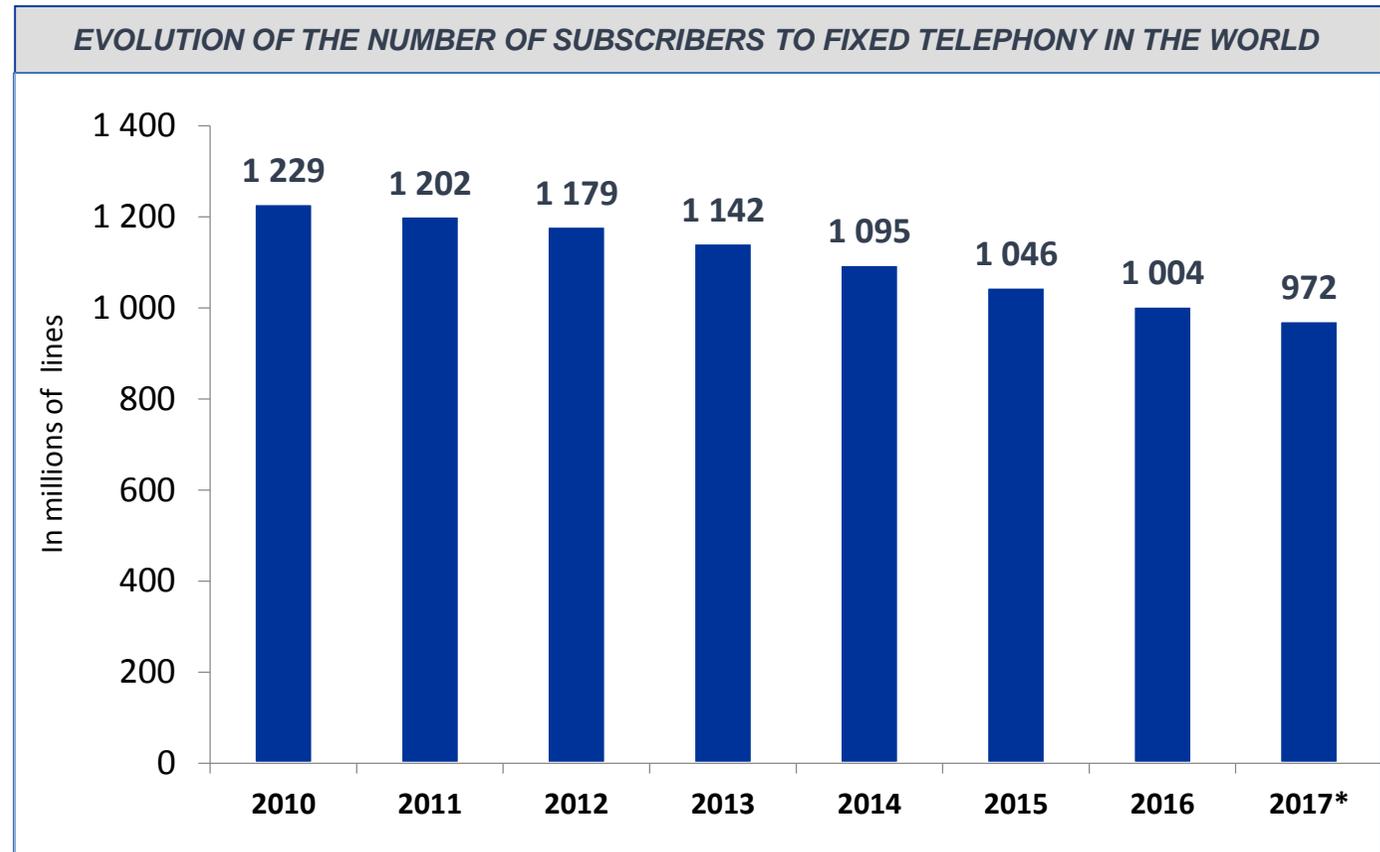
The rate of household equipment with fixed telephony has been declining for the last six years with less than one in five households equipped with it in 2017

The downward trend of fixed telephony is explained by the decline in the need: the mobile phone meets the growing demand of households in telephony.



The downward trend of the fixed telephony is observed on a worldwide scale

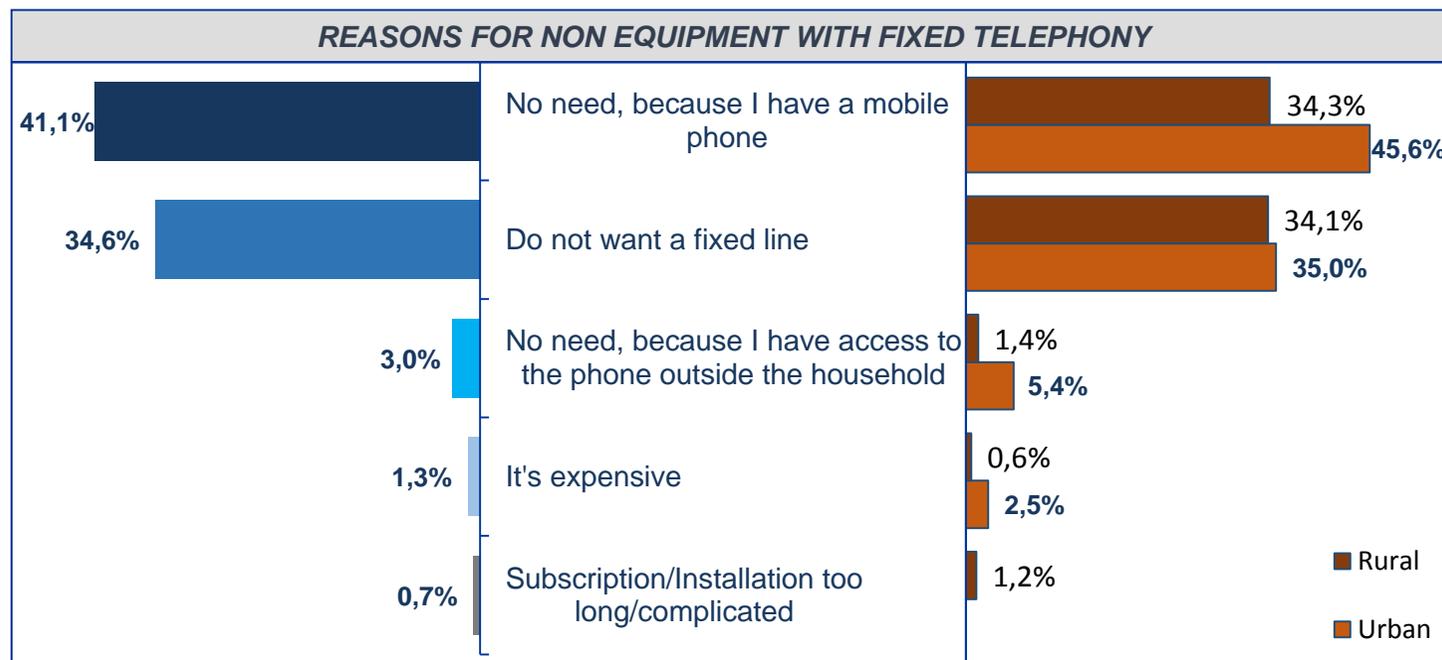
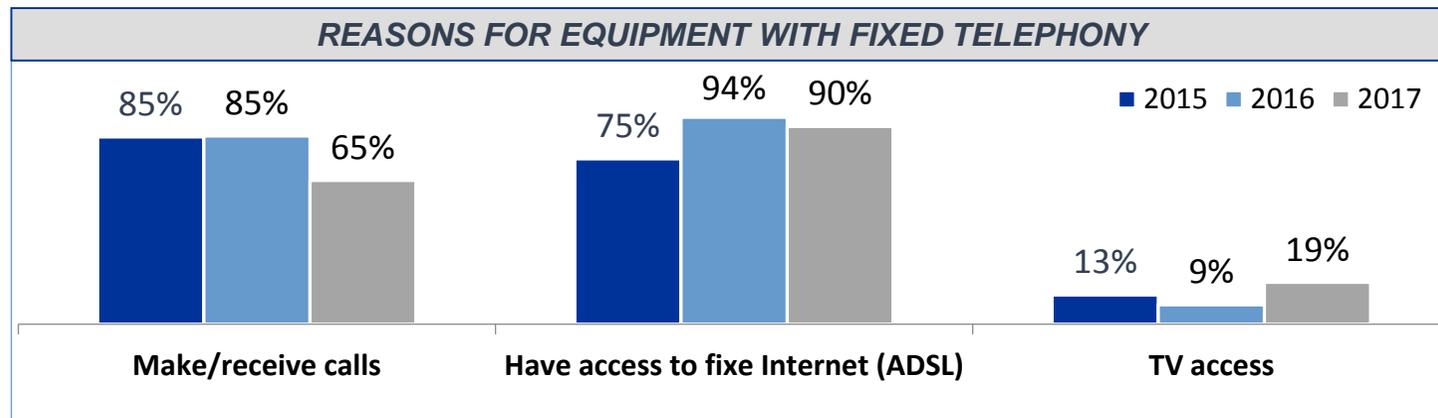
According to the ITU, the global fixed telephone subscribers base recorded an overall decrease of 22% between 2010 and 2017.



Source: ITU.
*: Estimation.

90% of households say they have equipped themselves with fixed telephony to access the Internet via ADSL

- The telephony service (voice) is currently provided mainly by mobile.
- The surveyed population first states that they do not feel the need to have a fixed line since they have a mobile phone.



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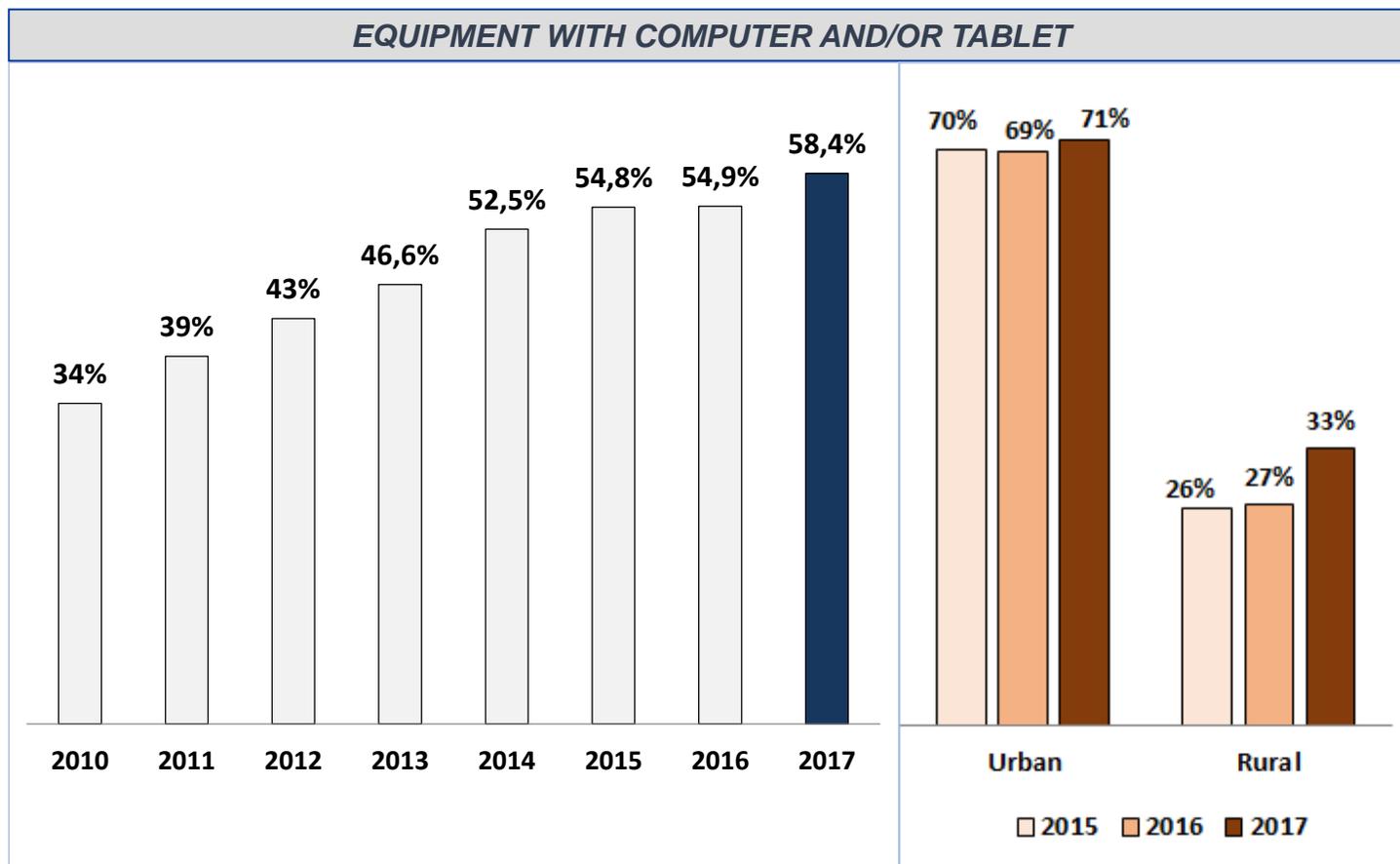
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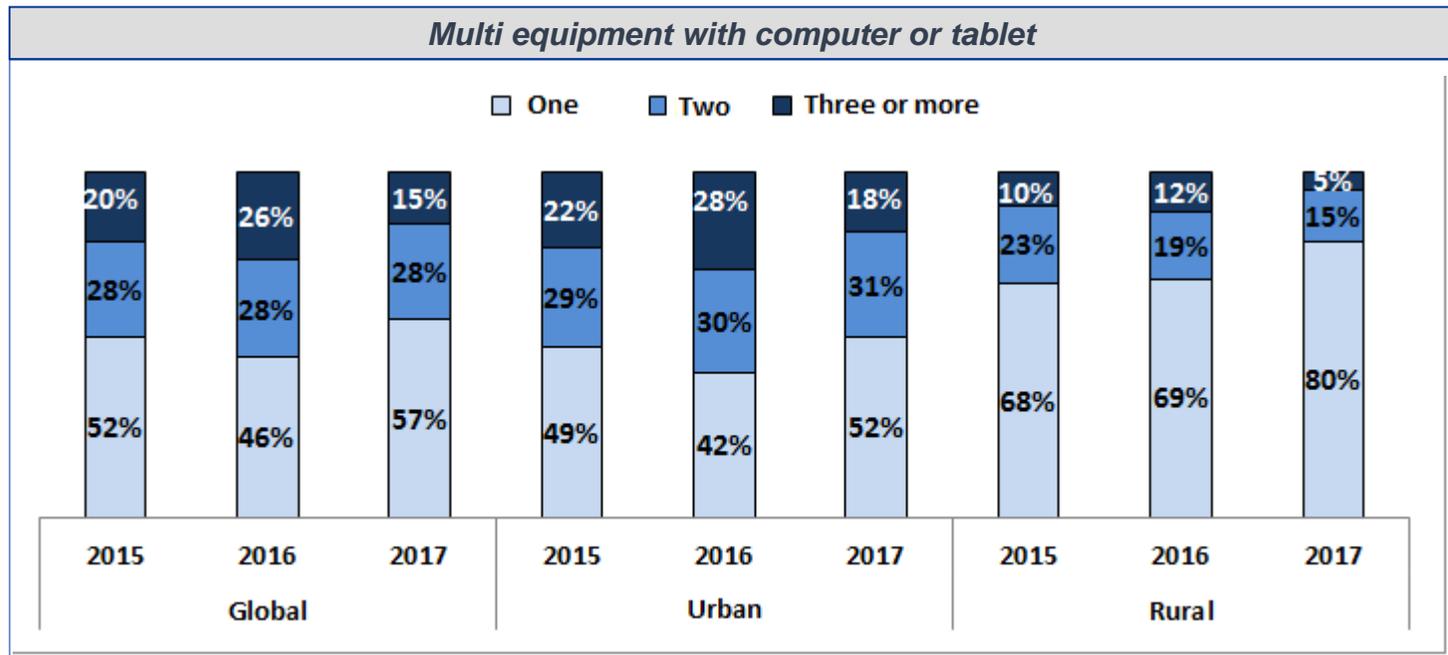
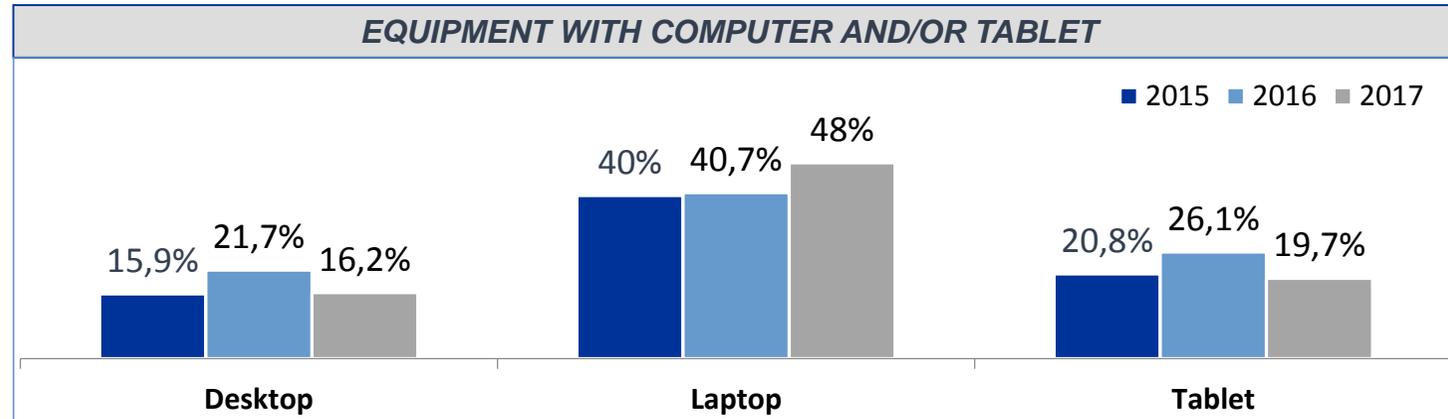
In 2017, 58.4% of households are equipped with computers/tablets, an increase of more than 6% compared to 2016

- A gap is observed between urban and rural areas with respectively 71% and 33%.
- On the other hand, the rate of progression in rural areas is considerable: + 27% in rural areas and + 2.3% in urban areas (2015-2017).



The proportion of households with more than one computer/tablet decreases

The laptop captures the demand for computers at the expense of the desktop and the tablet.



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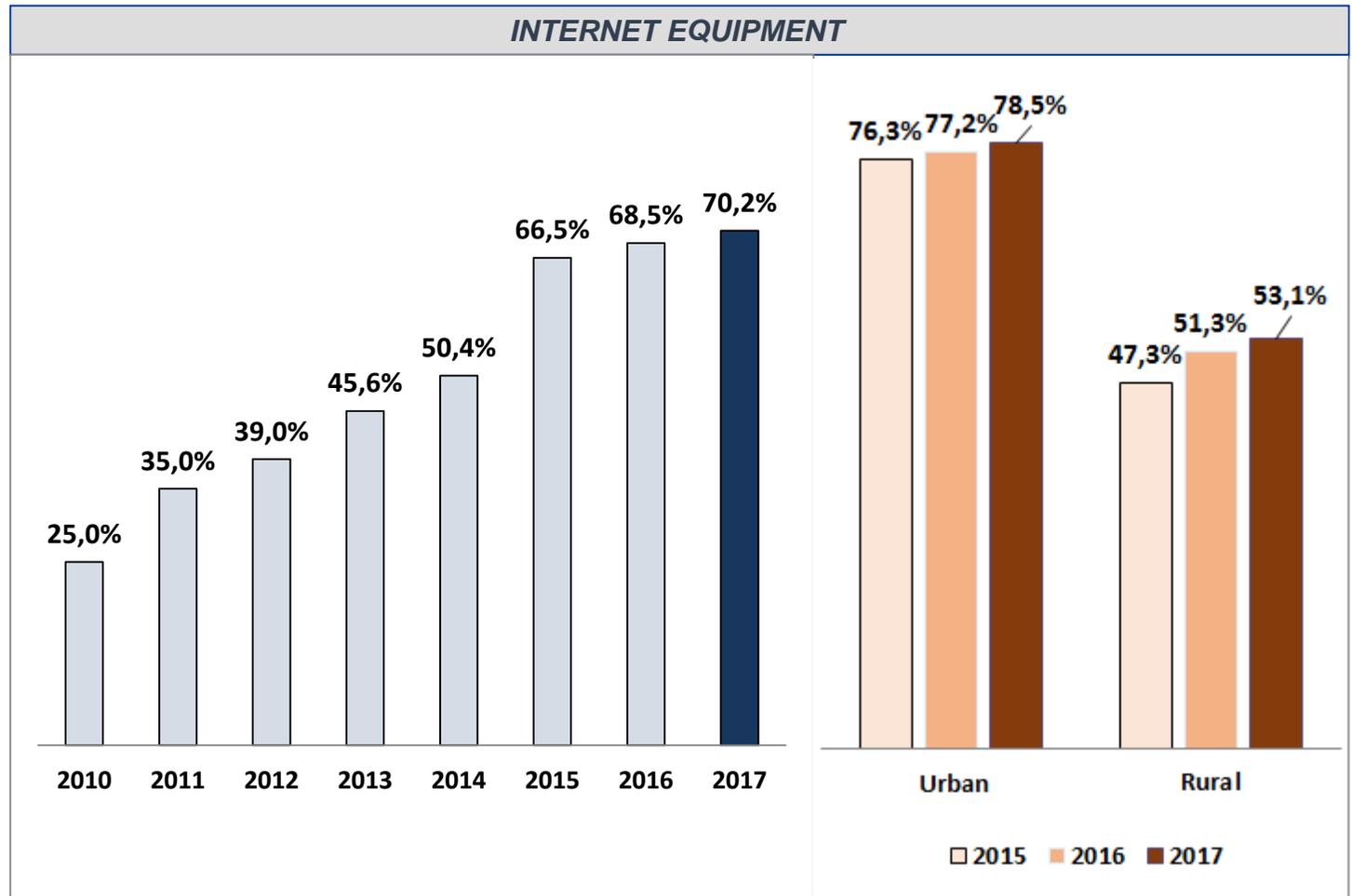
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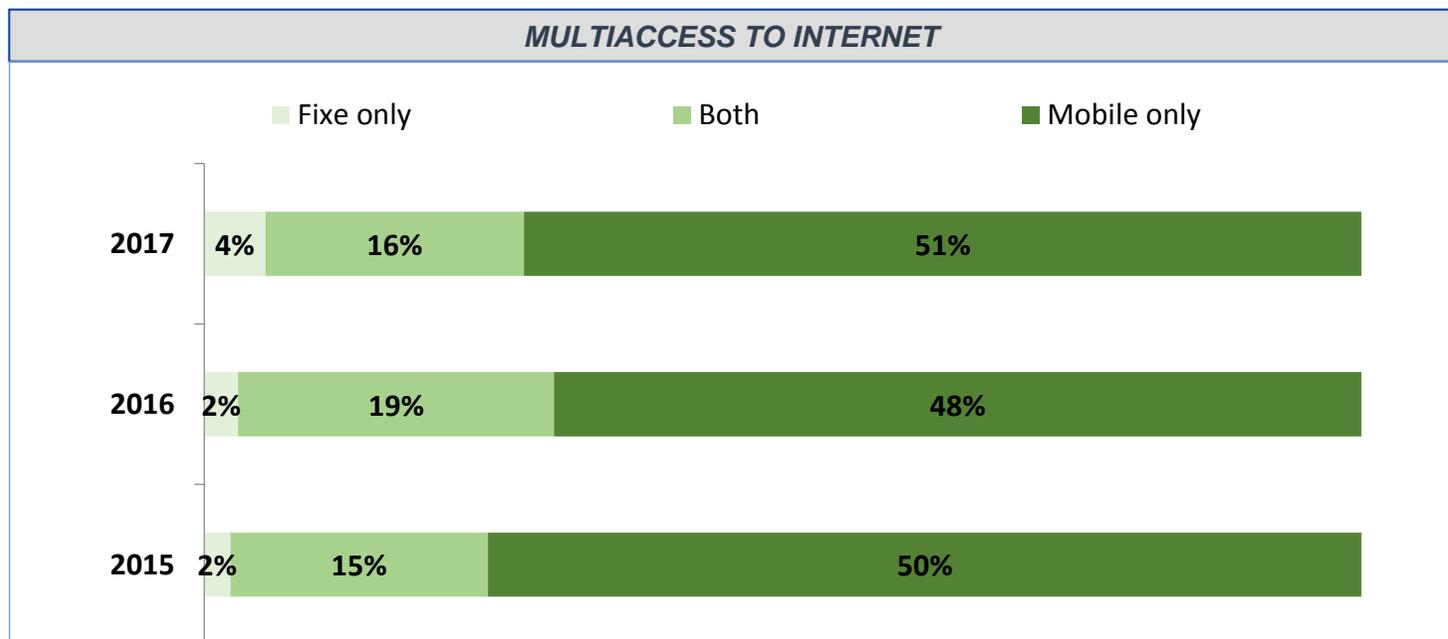
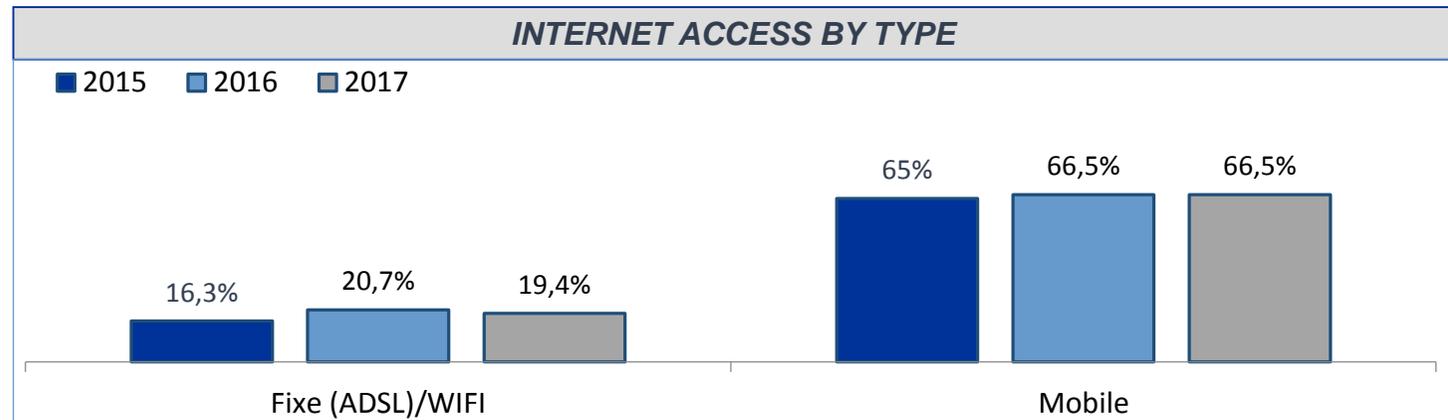
70.2% of households are equipped with Internet with 77.2% of households in urban areas and 51.3% in rural areas

The Internet is becoming popular and is gradually spreading in rural areas.



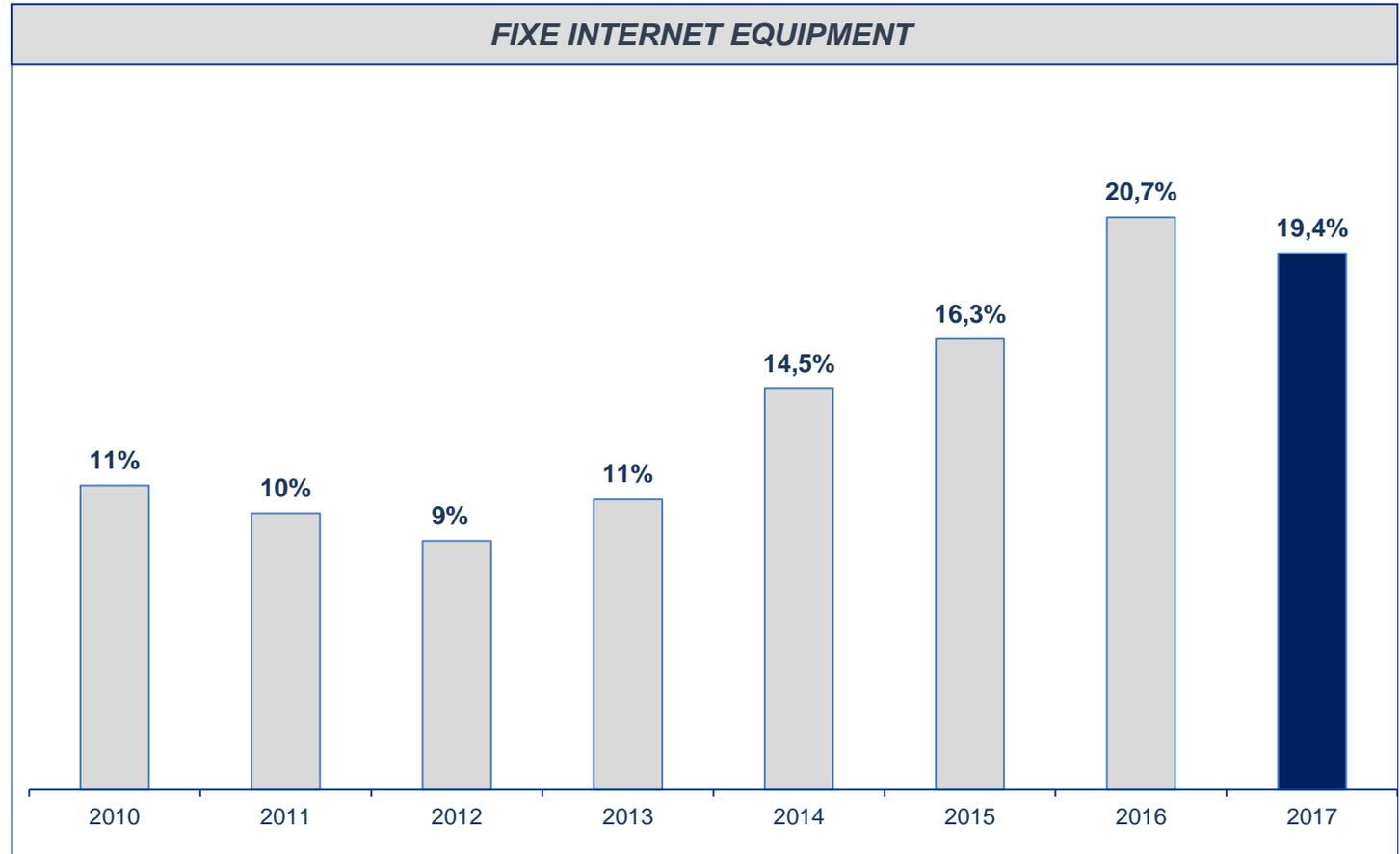
Mobile Internet is the main access mode to Internet among Moroccan households

The Internet access mix reveals that nearly two out of 10 households are doubly equipped : fixe and mobile access.



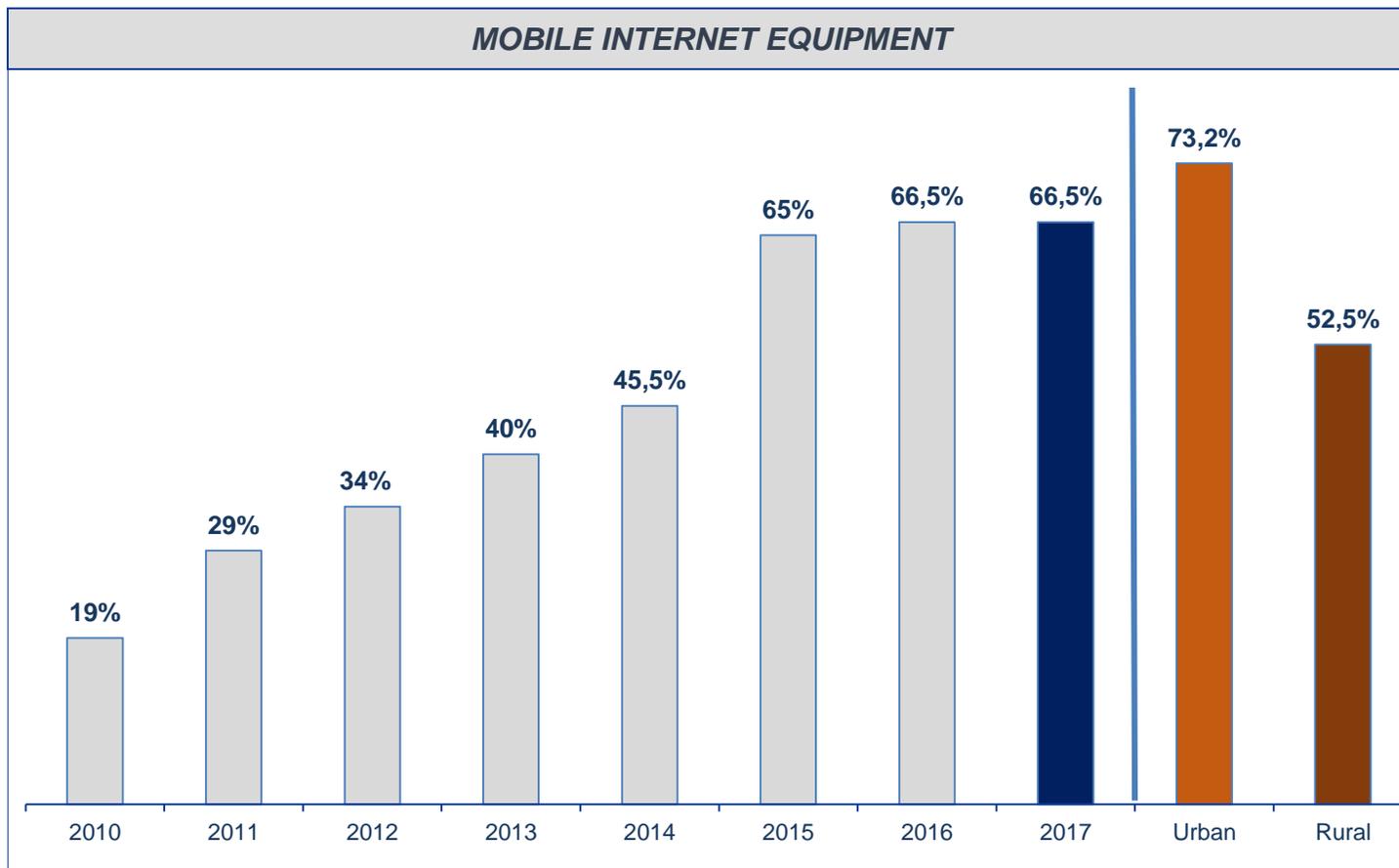
A strong urban-rural disparity in terms of equipment with fixed Internet access

19.4% of households are equipped with fixed Internet access, 27.7% of which are in urban areas.



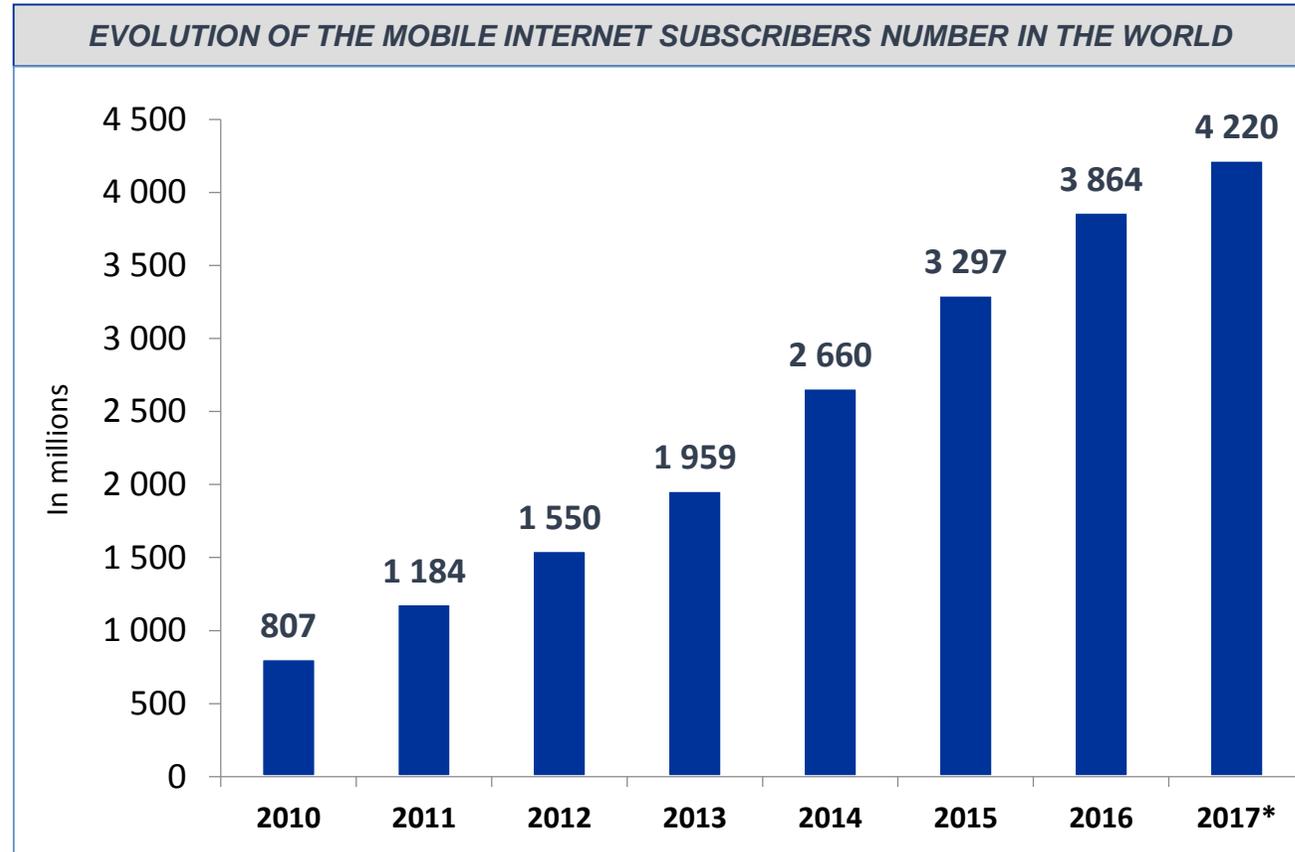
7 urban households and 5 rural households out of 10 are equipped with mobile Internet access

66.5% of households are equipped with mobile Internet access, 73% of them in urban areas and 52.5% in rural areas.



Mobile Internet is booming globally

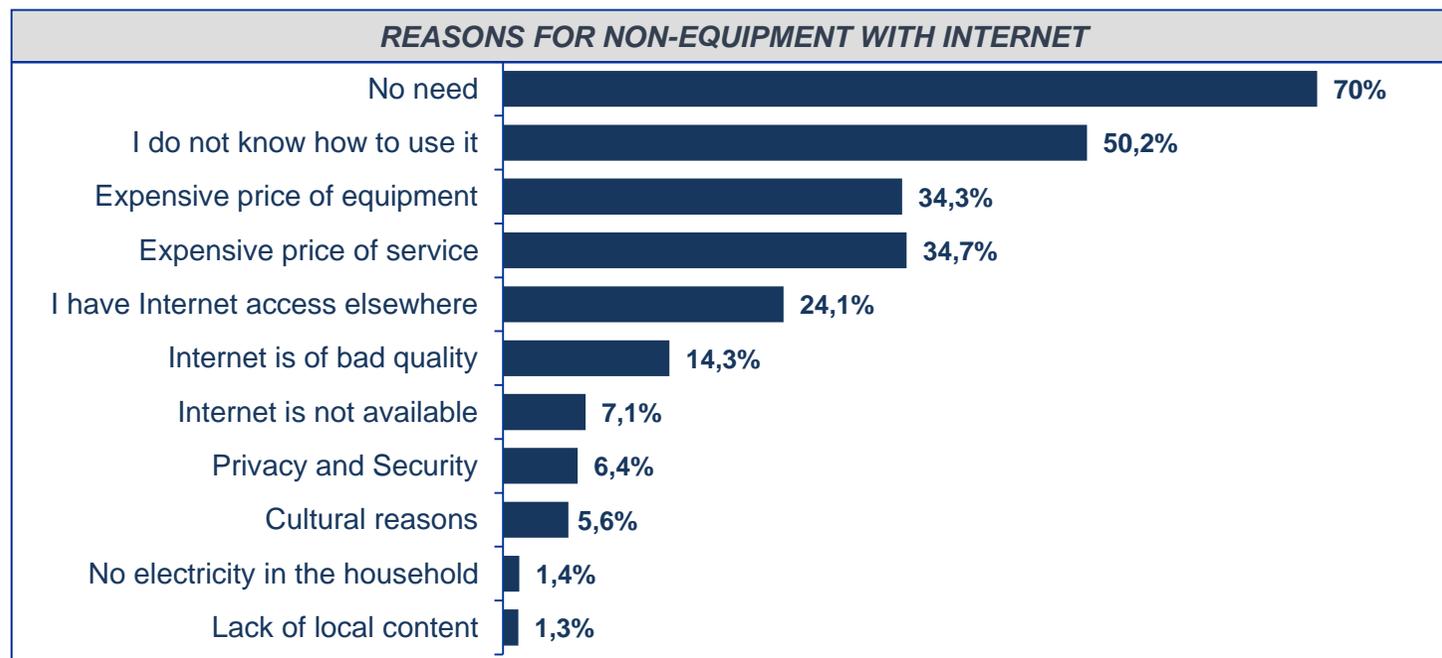
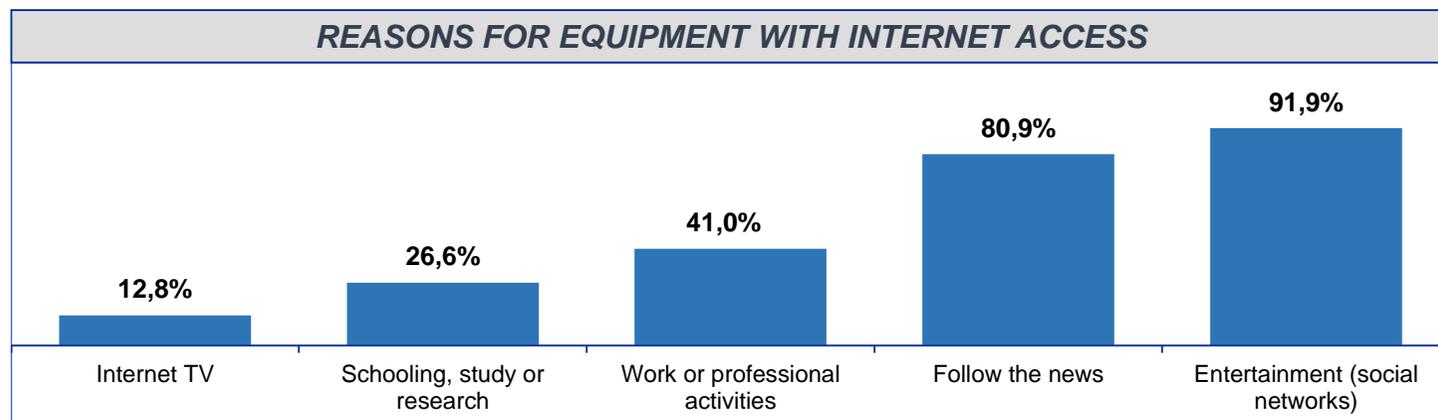
The mobile Internet subscribers number in the world has grown more than 5 times between 2010 and 2017.



Source: ITU.
*: Estimation.

Entertainment (social networks) and news are the most frequently cited reasons for Internet access equipment

- Entertainment is leading the way for Internet access at home, followed by the need for information.
- Professional activities are a reason for 4 out of 10 households.
- The lack of need comes at the top of the restrictions to equipment with Internet access.



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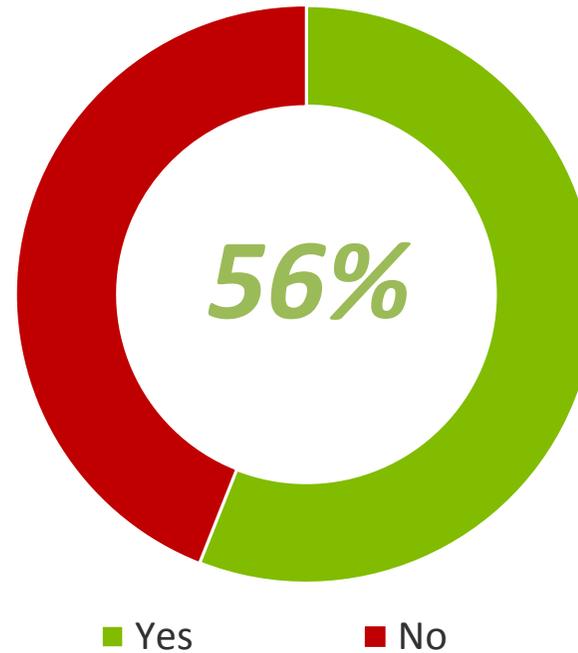
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In one out of two households, children under 15 years old use the Internet

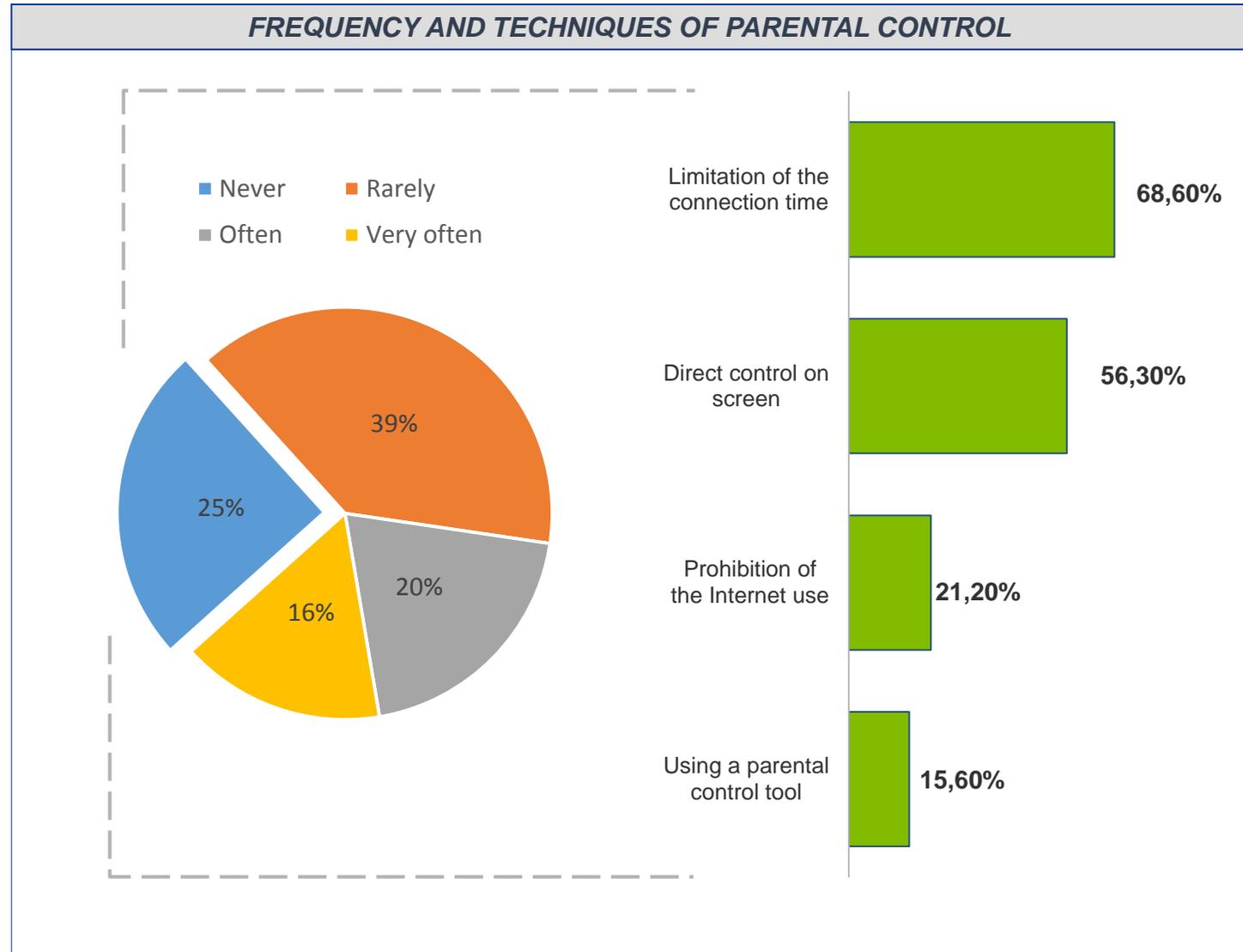
The level of the Internet use by children under 15 years (56% of households) is supported by the reason for Internet equipment (Education and Studies) cited by nearly one out of four households.

INTERNET USE BY CHILDREN UNDER 15 YEARS



75% of parents say they control their children's use of Internet

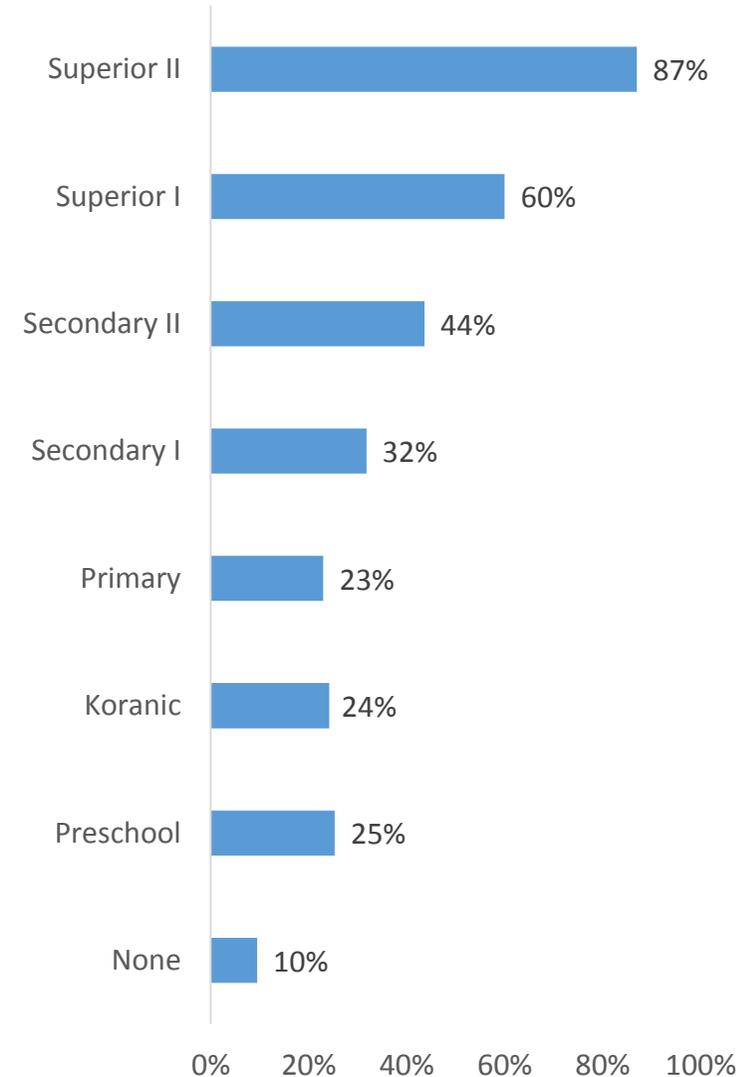
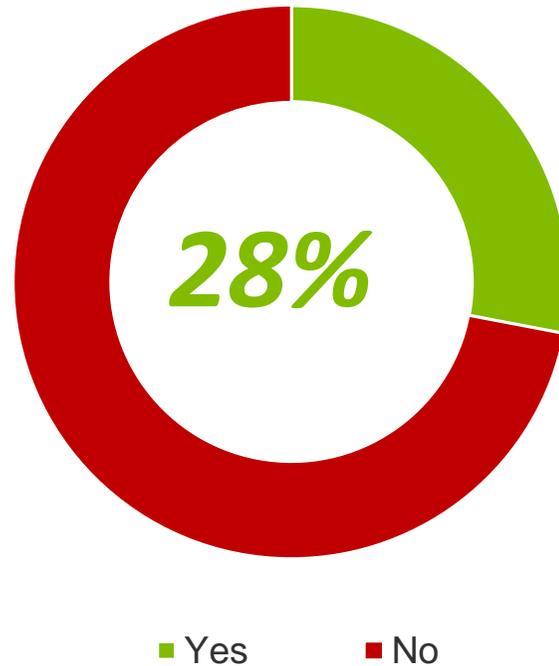
- The most common parental control technique is the limitation of the connection time on the Internet, followed by direct control on the screen.
- Few parents (15.6%) use specialized control tools.



More than 7 out of 10 parents say they do not have the tools to support and steer their children's use of the Internet

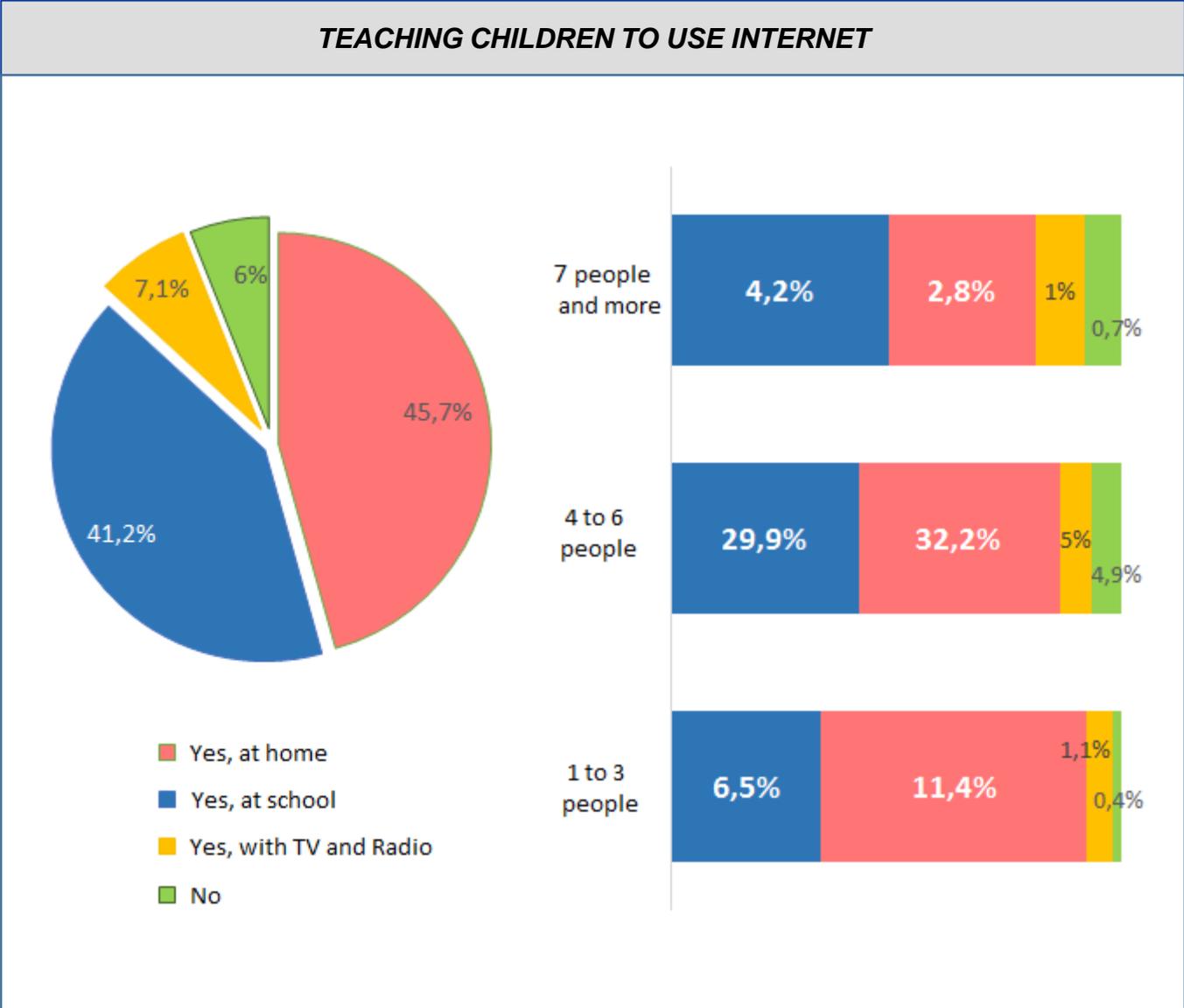
- Only 28% of parents have the skills to guide their children's Internet use.
- The higher the level of education of parents, the more able they are to guide and support their children in using the Internet.

PARENTS' SKILLS IN GUIDING THEIR CHILDREN'S INTERNET USE



41% of parents think their children should be taught to use Internet at school

In large families, parents tend to view school as an alternative and/or supplement to their children's teaching of the Internet use.



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4 Social Networks

5 Online shopping

6 Risks related to Online Security

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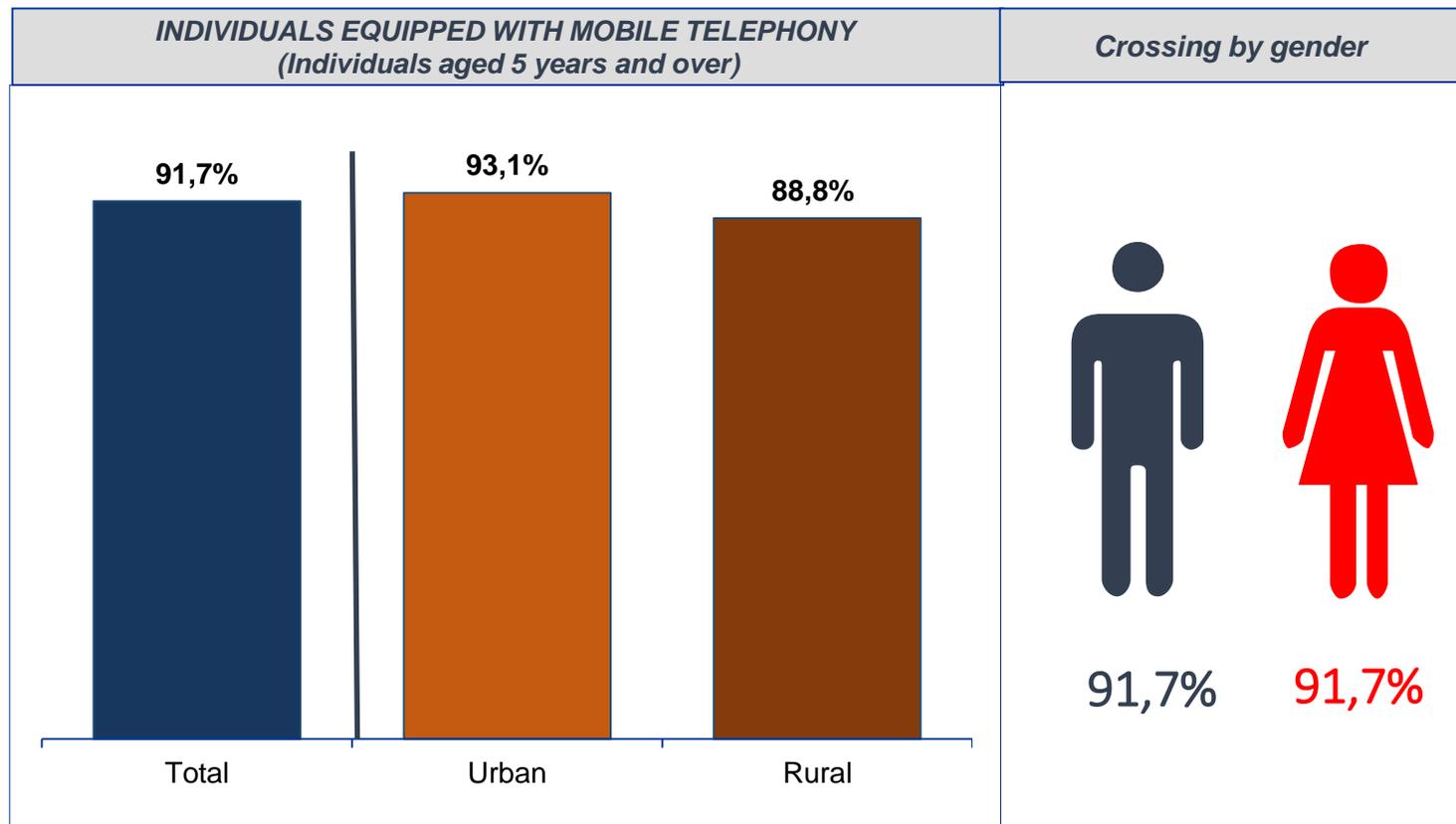
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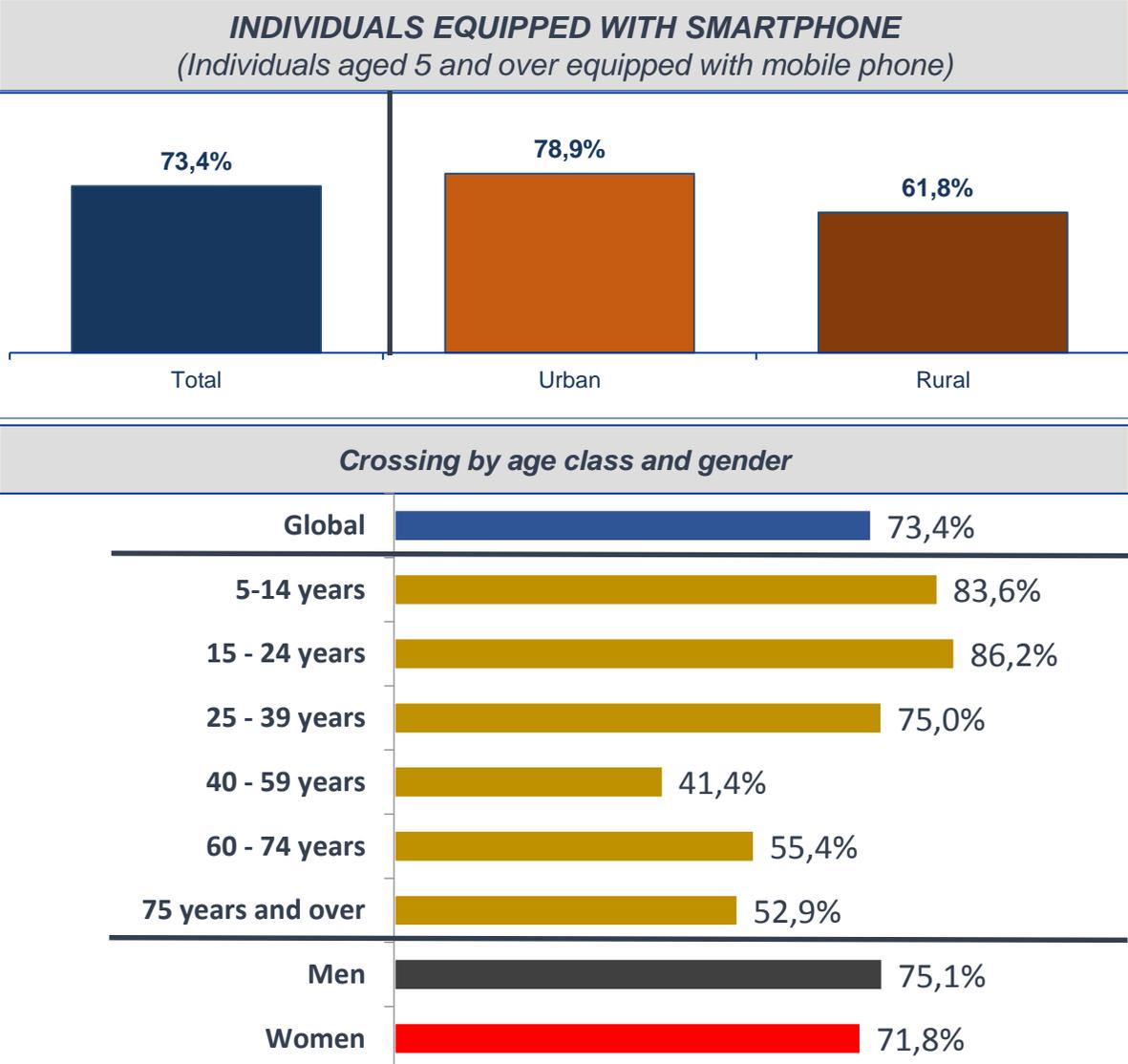
91.7% of individuals aged 5 and over are equipped with mobile telephony

Equality between women and men



73.4% of individuals aged 5 years and over equipped with a mobile phone have a smartphone

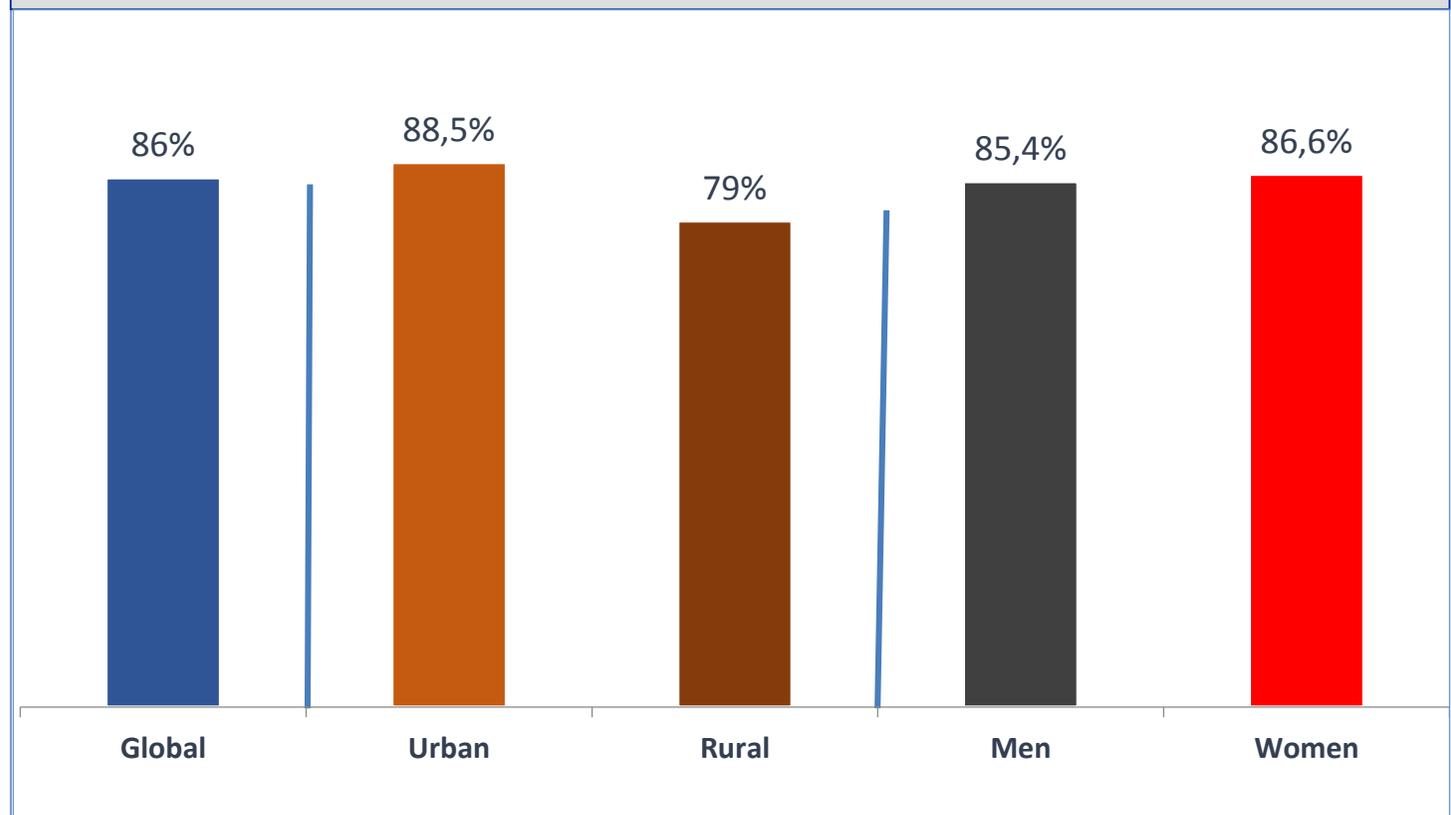
- 73.4% of individuals equipped with a mobile phone own a smartphone
- The youngest age groups (from 5 to 39 years) being the most equipped with rates of almost 80%
- The total number of smartphone handsets is estimated at nearly 22,640,986



86% of individuals (5 years old and over) equipped with smartphone use it to access the Internet

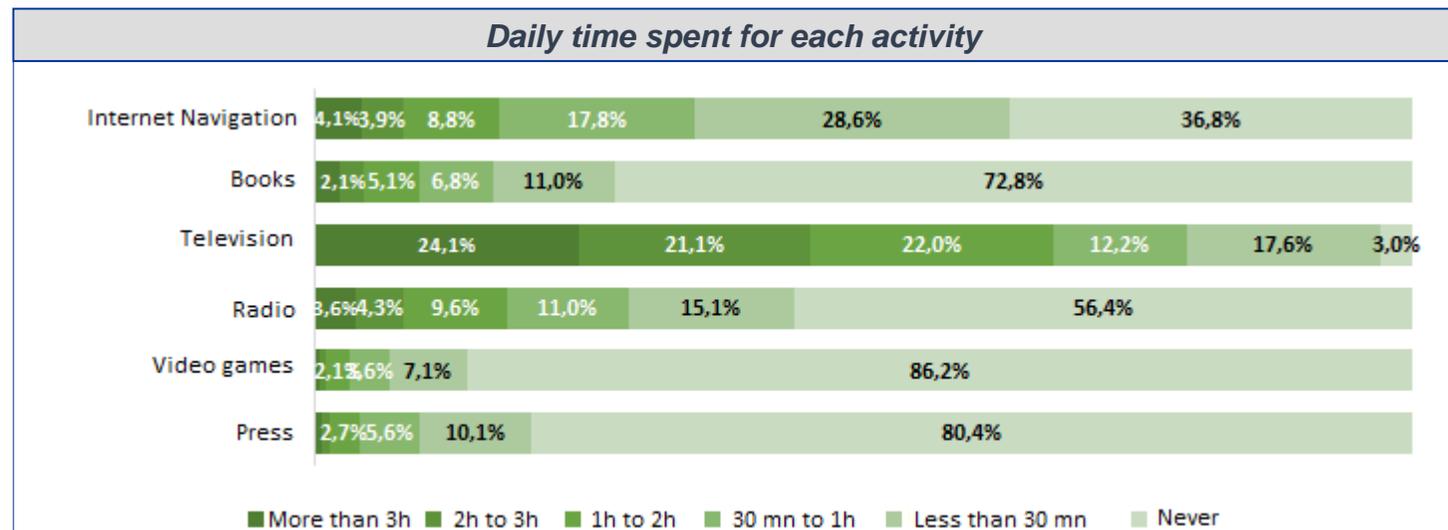
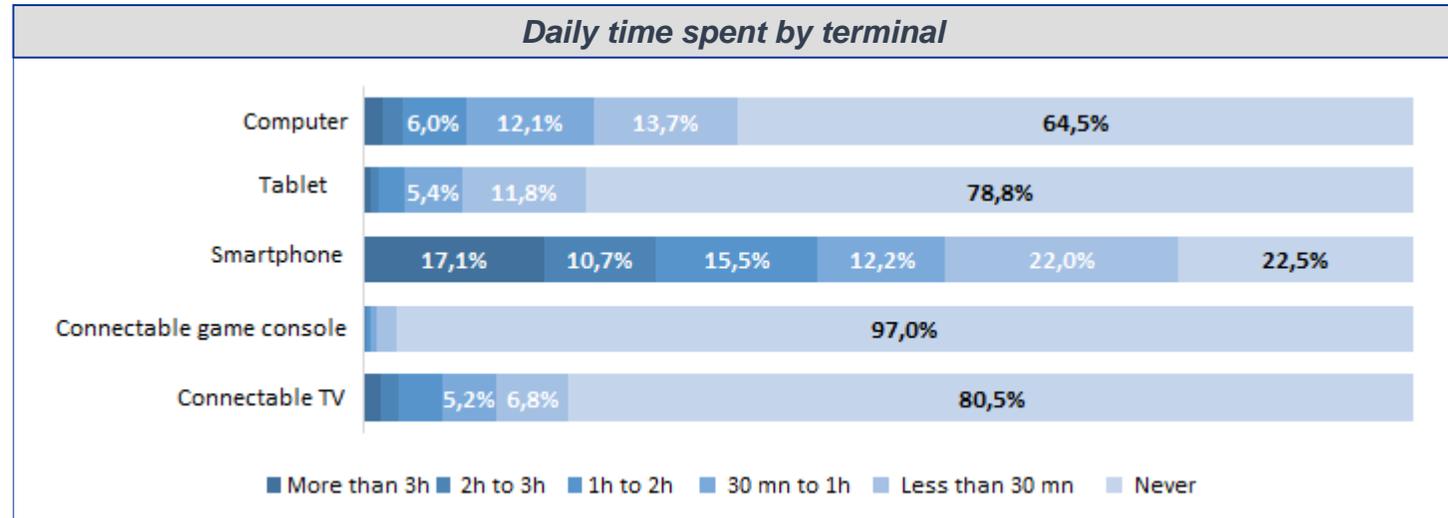
86% of individuals equipped with smartphone use it to access the Internet, which is nearly 19.6 million people.

INDIVIDUALS HAVING A SMARTPHONE AND ACCESSING THE INTERNET (5 years and over)



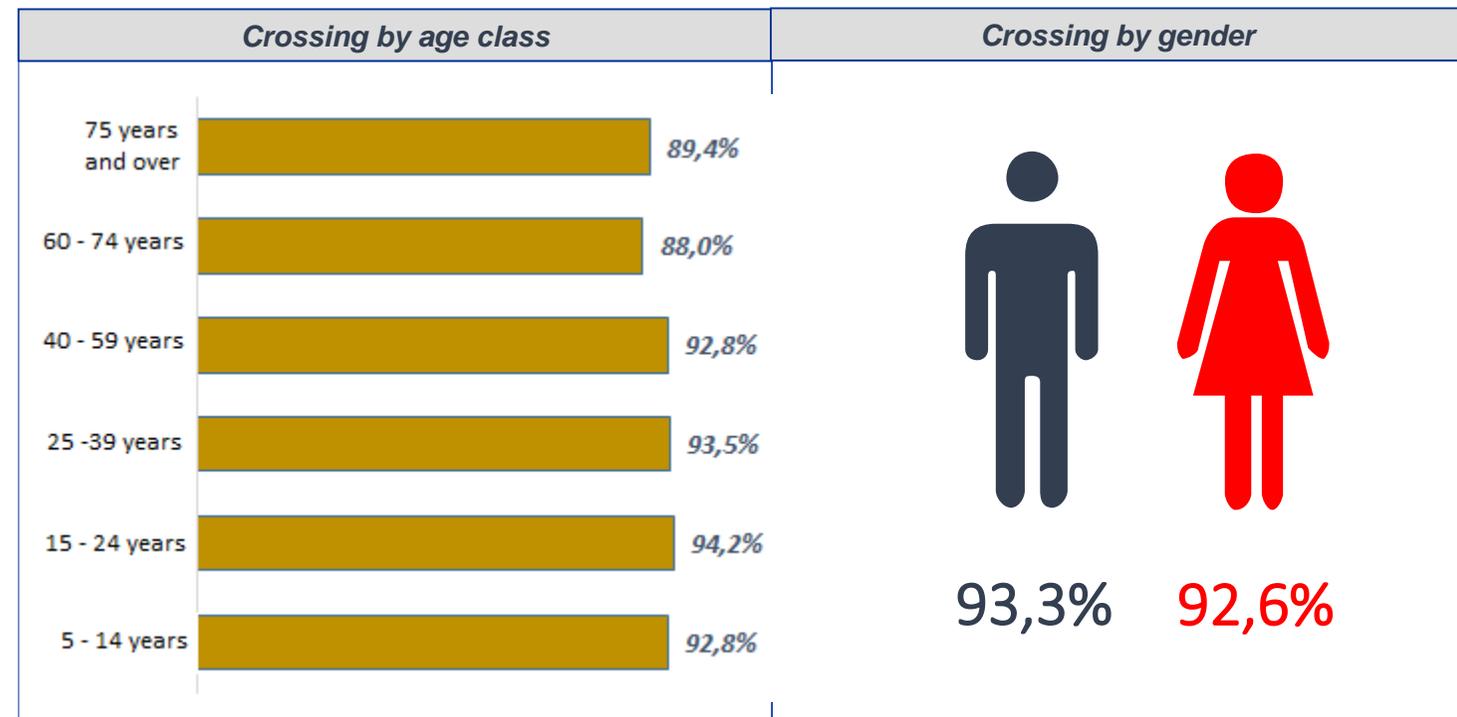
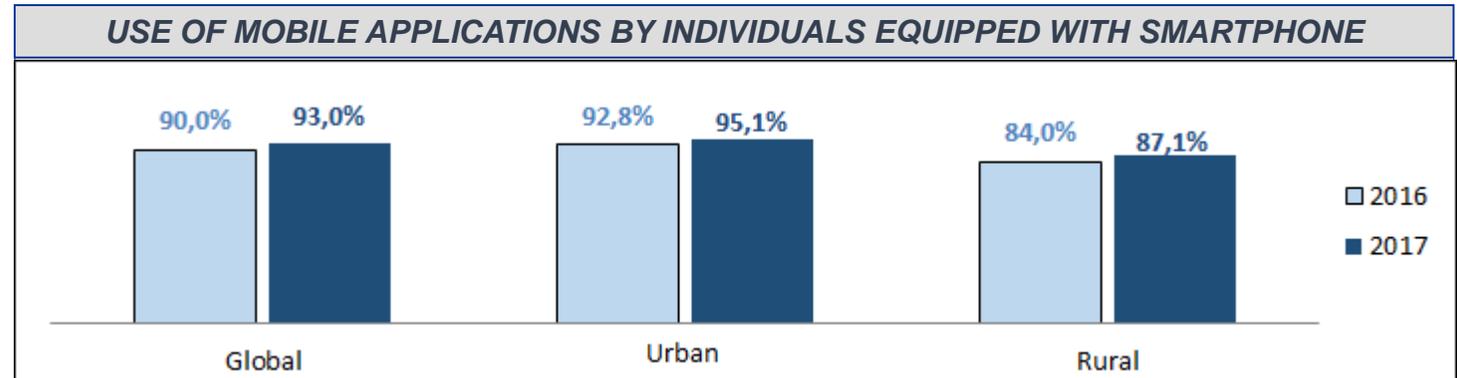
The smartphone is the screen in front of which people spend the most time (more than 3 hours a day for 20% of them)

- Video games do not interest lot of Moroccan individuals (9/10 do not do it).
- On the other hand, navigation is the second activity on which one out of five users spend between 30 and 60 minutes.
- Individuals devote more time to reading books than the press.
- 16% of individuals spend some time consulting books (5% from 1 to 2 hours).



The use of mobile applications is a common practice in both areas

- A rise of 3% was recorded from 2016 to 2017. This increase affected both urban and rural residents equally.
- No differentiation in the use of mobile applications by age and gender.



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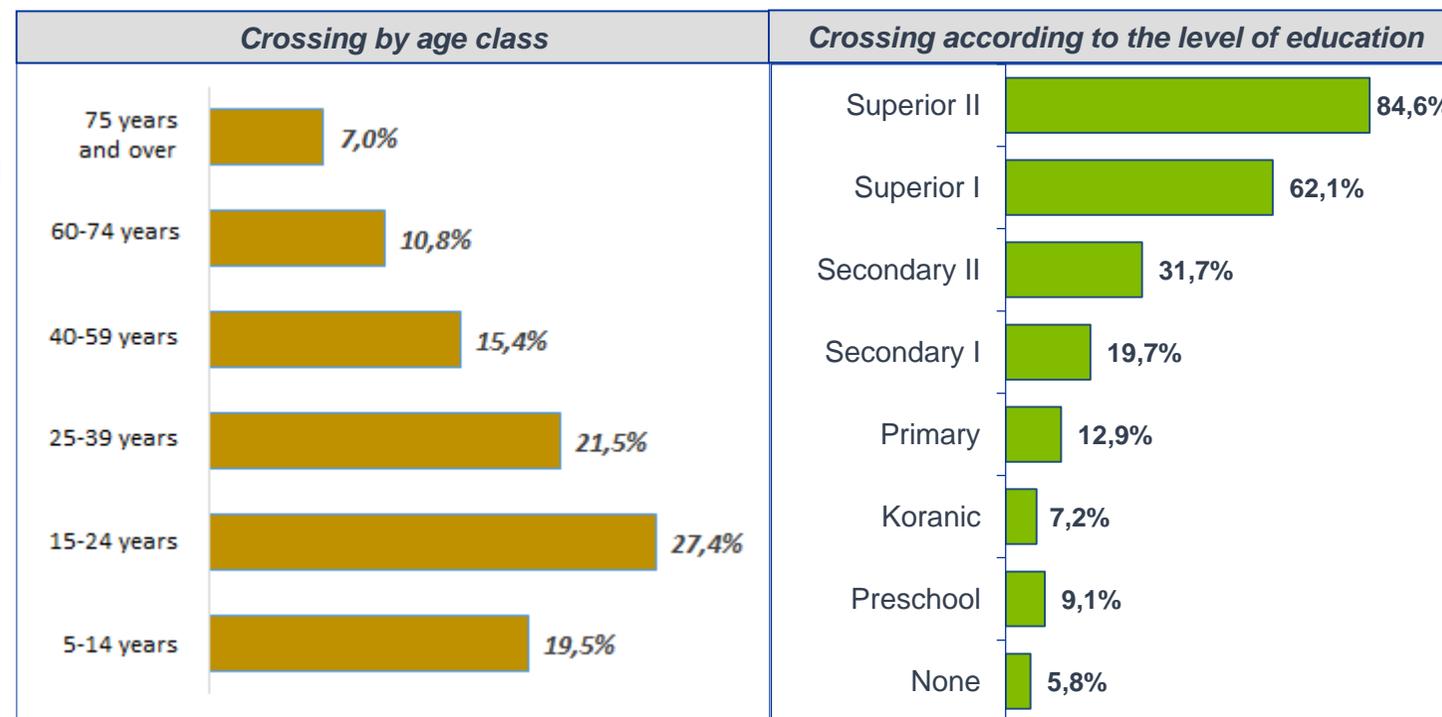
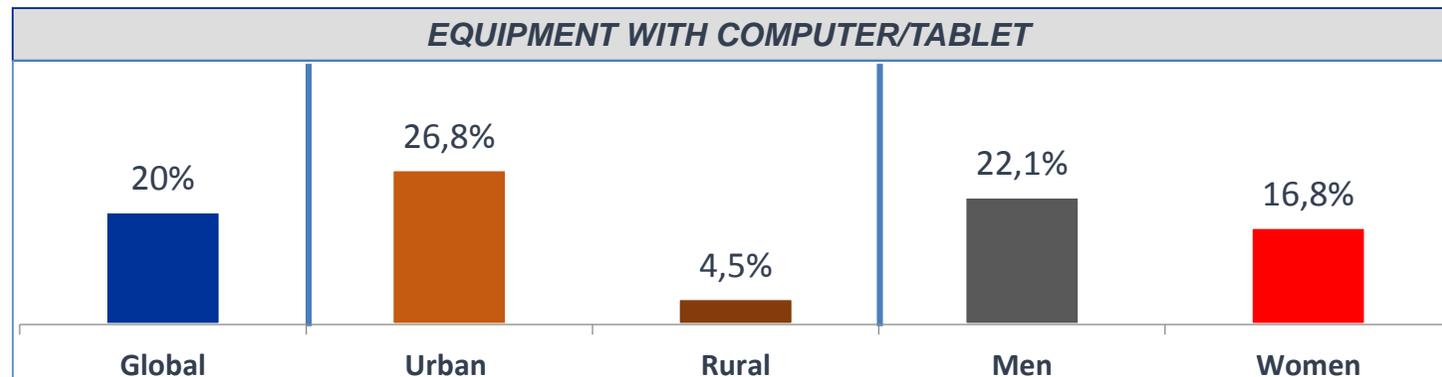
5 Online Shopping

6 Risks related to Online Security

One out of five individuals owns a computer or tablet

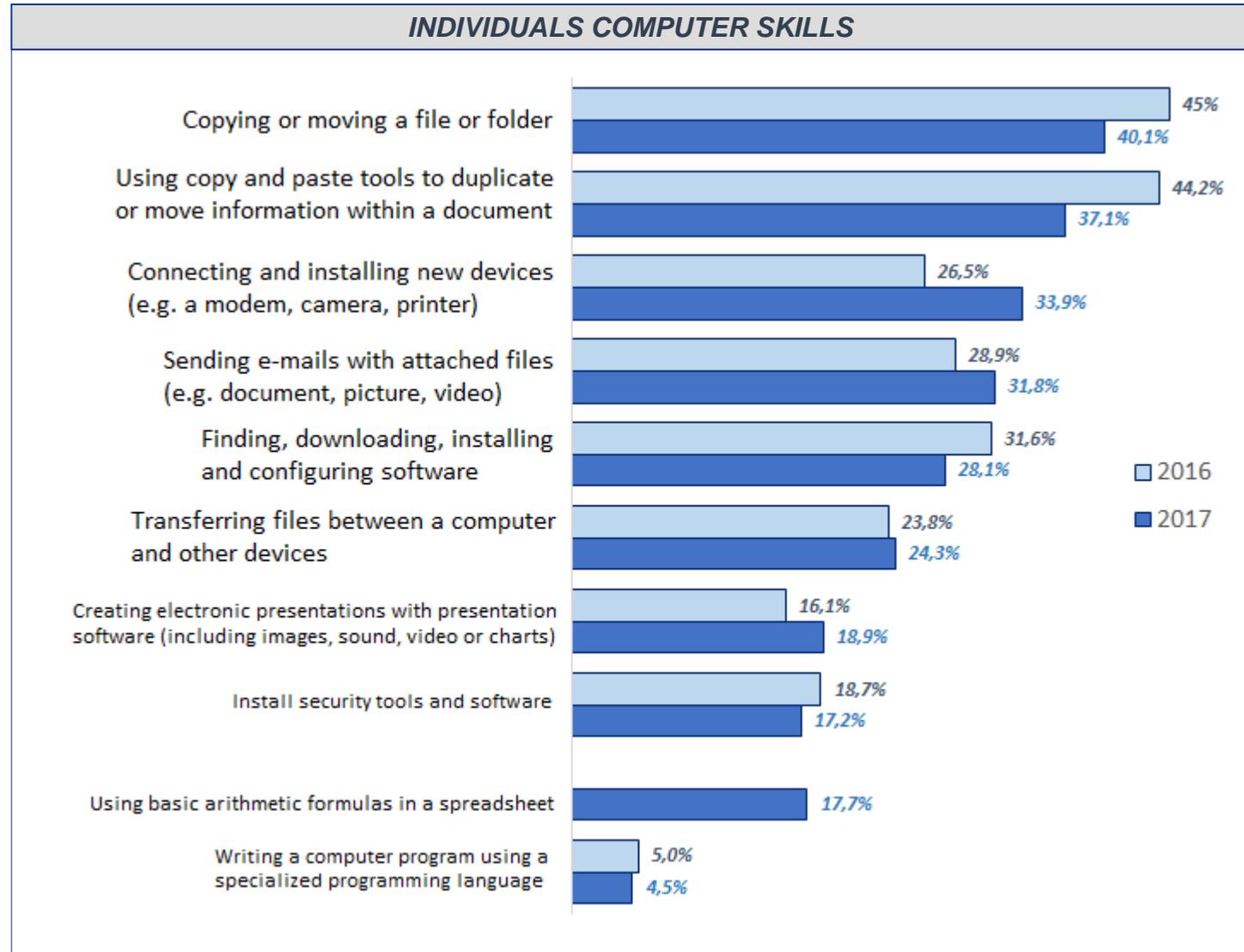
- The poor performance of the rural area can have several causes : illiteracy, the nature of the productive activities (agricultural) that do not require computer equipment and finally the cost.

- Young people aged 15 to 39 are the most equipped with a computer/tablet.



Four out of 10 Moroccans master office/computer tools

The IT skills that have registered greater improvement are those related to the installation of a new device and the sending of e-mails.



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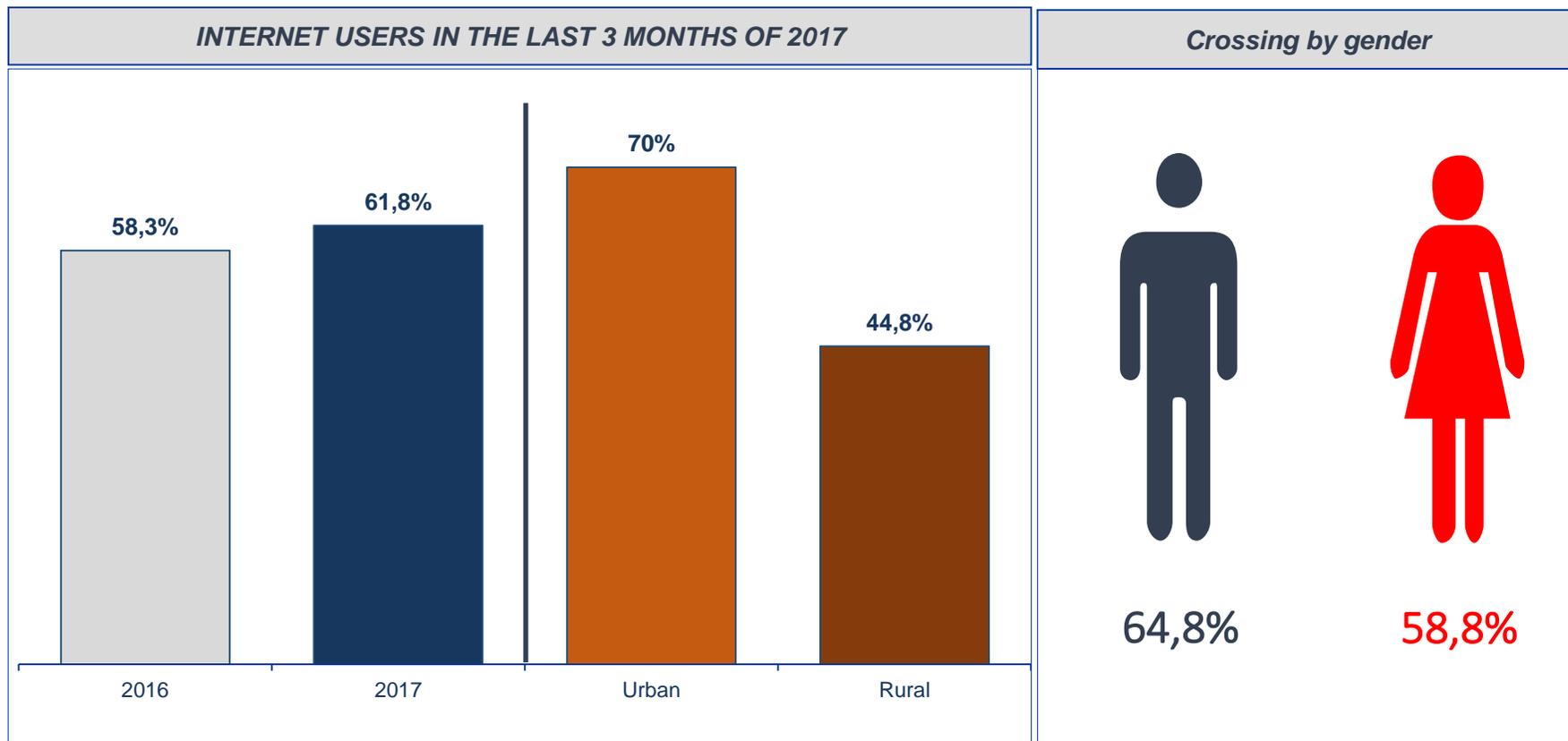
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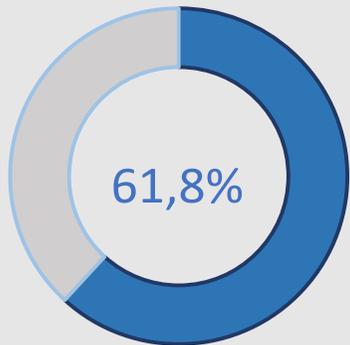
6 Risks related to Online Security

61.8% of individuals aged 5 and over used the Internet in the last 3 months of 2017

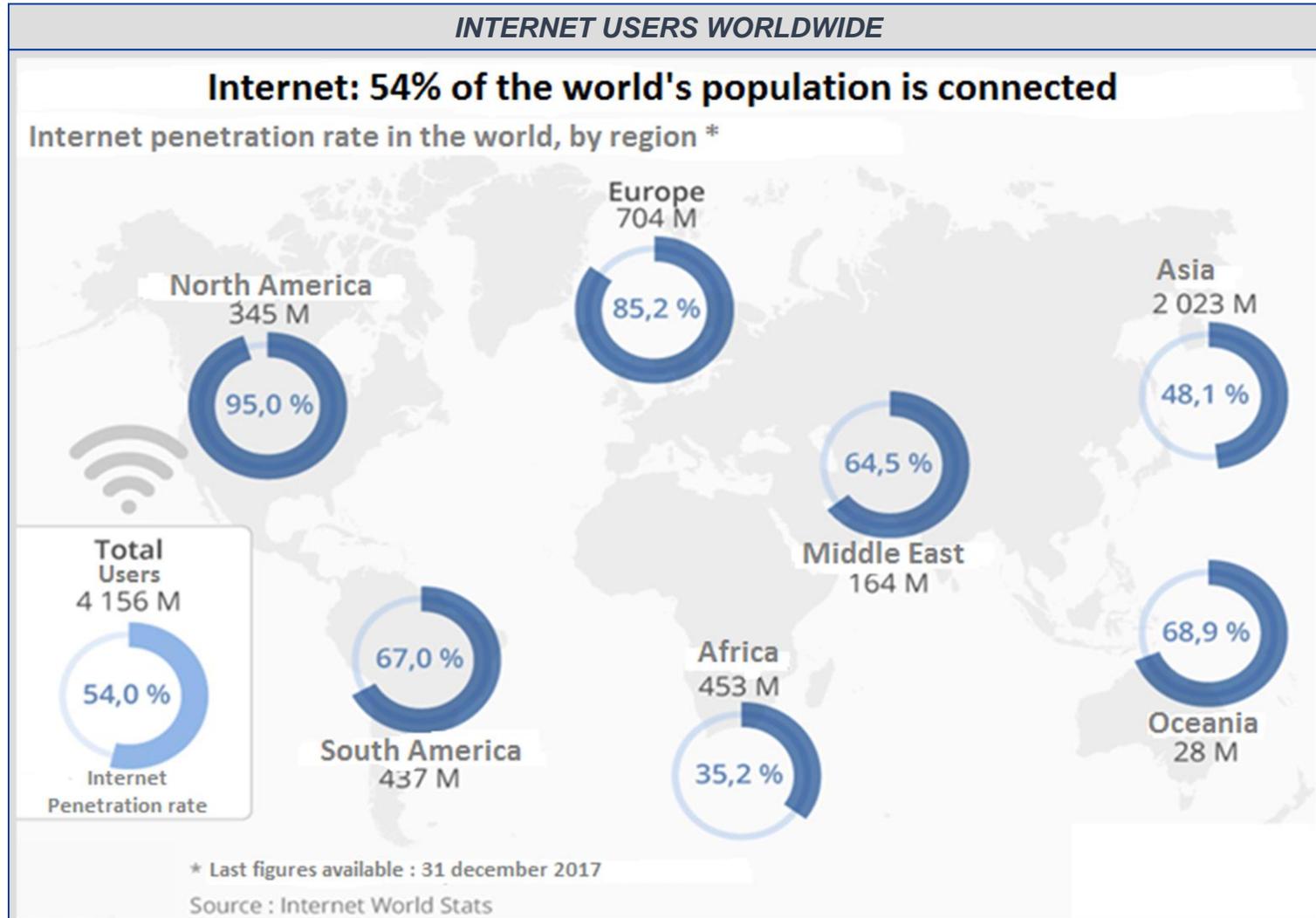


Morocco's Internet penetration rate lifts Africa's rate

- Morocco is above the world average by more than 7 points.

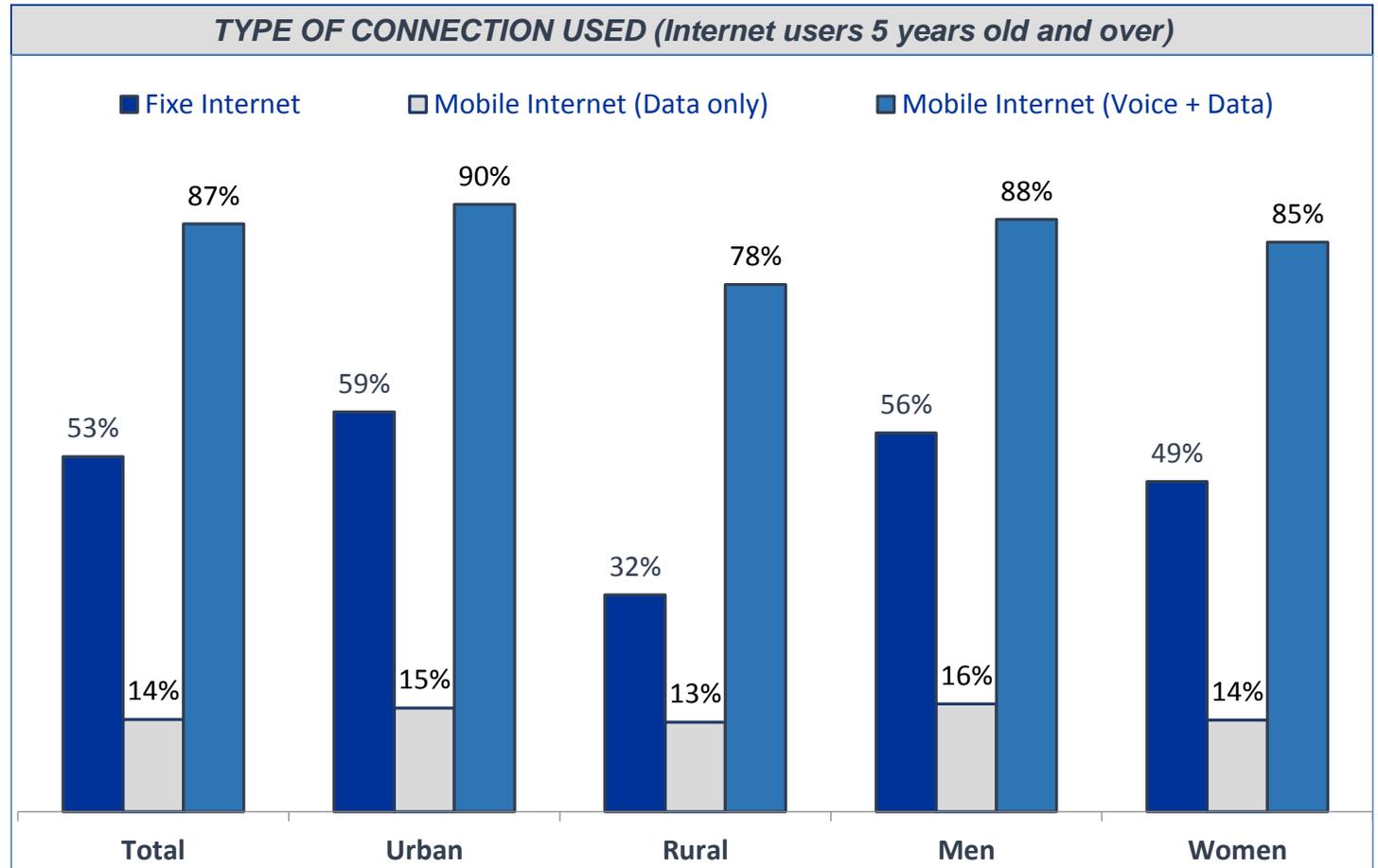


Morocco
19,6M



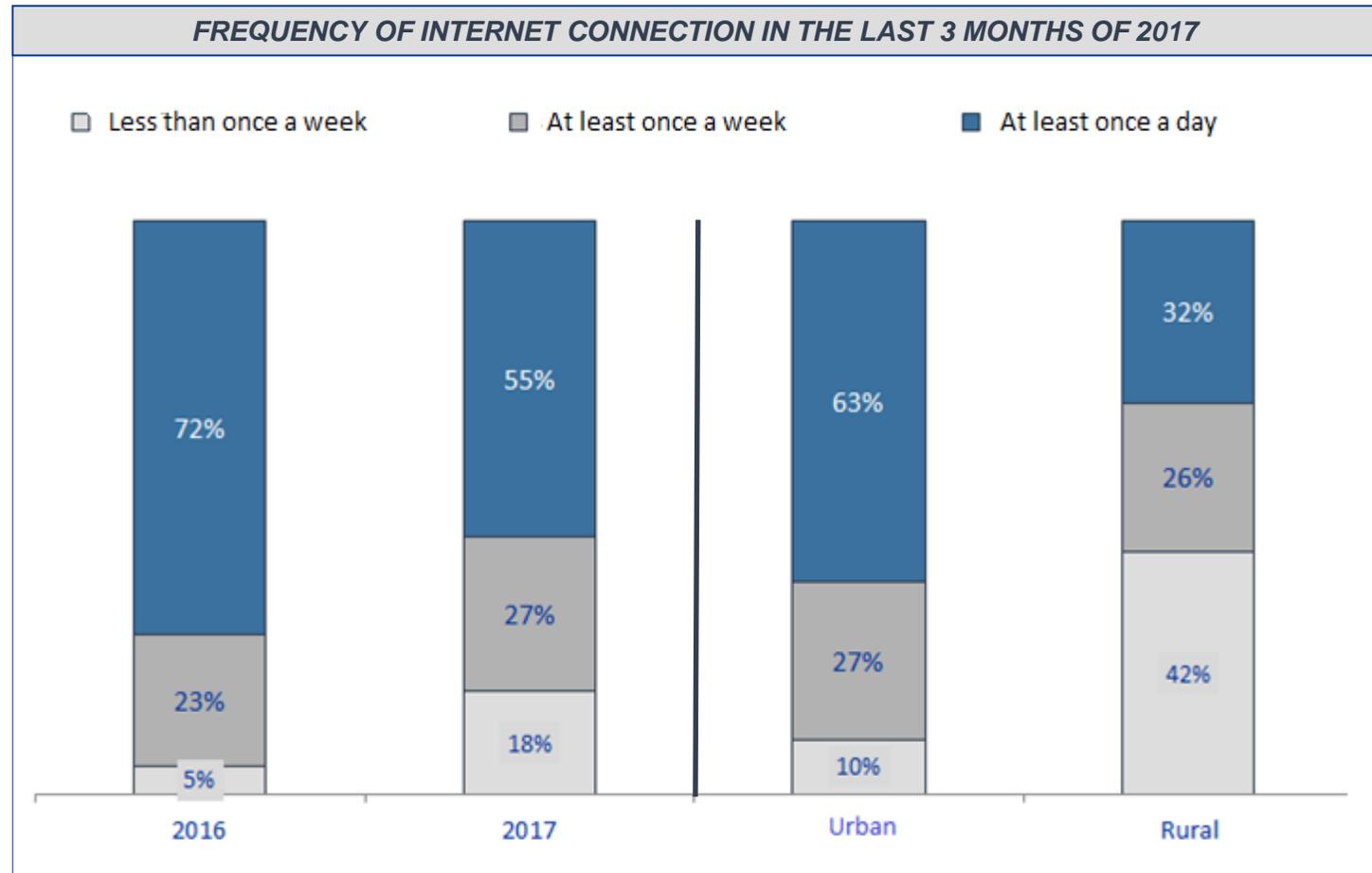
The vast majority of Internet users prefer using mobile connections to access the Internet

Rural areas benefit
from Mobile
Internet.



55% of Internet users accessed the Internet at least once a day during the last three months of 2017, 27% accessed at least once a week

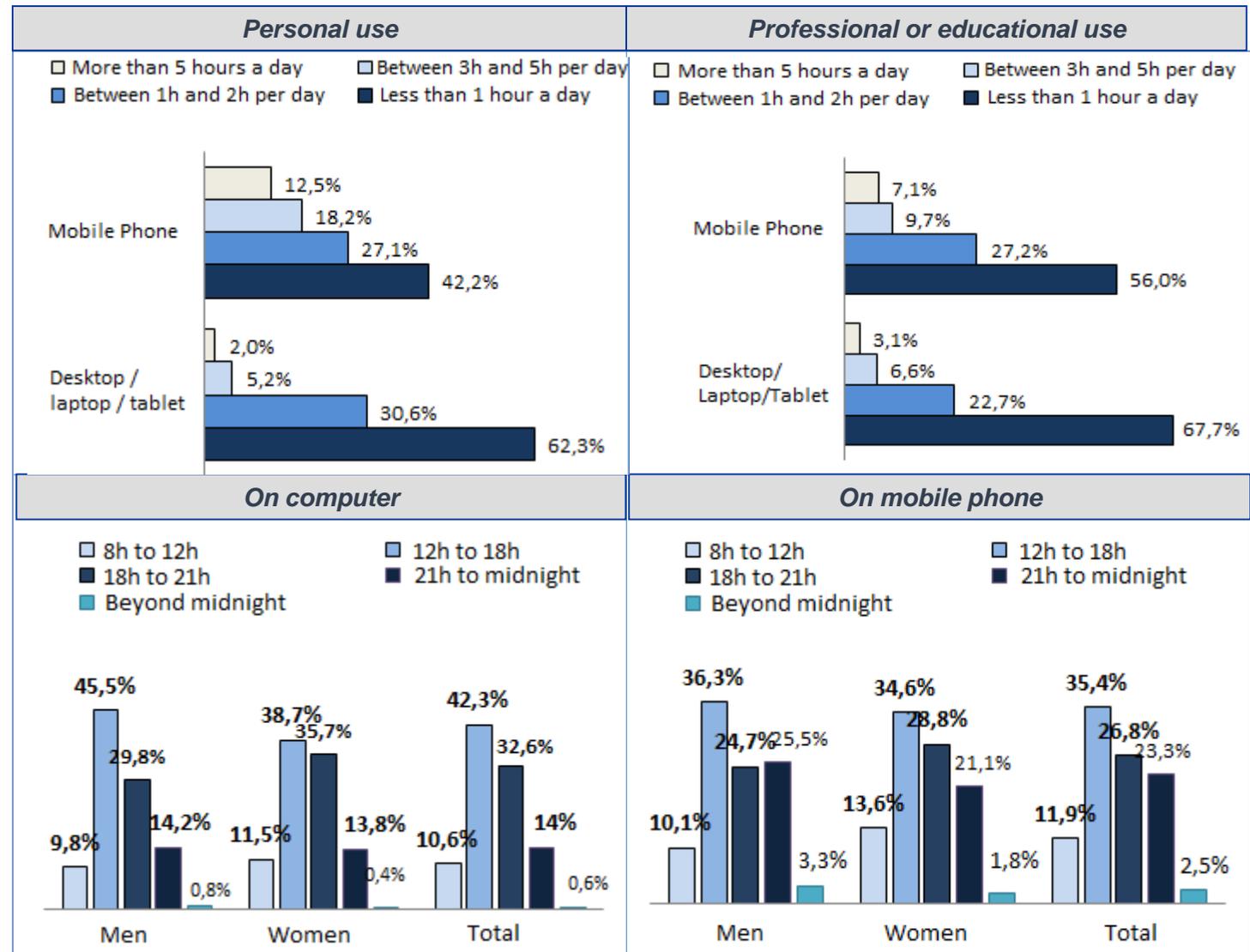
Internet use is daily for more than half of Internet users.



Almost half of Internet users spend over an hour on the Internet

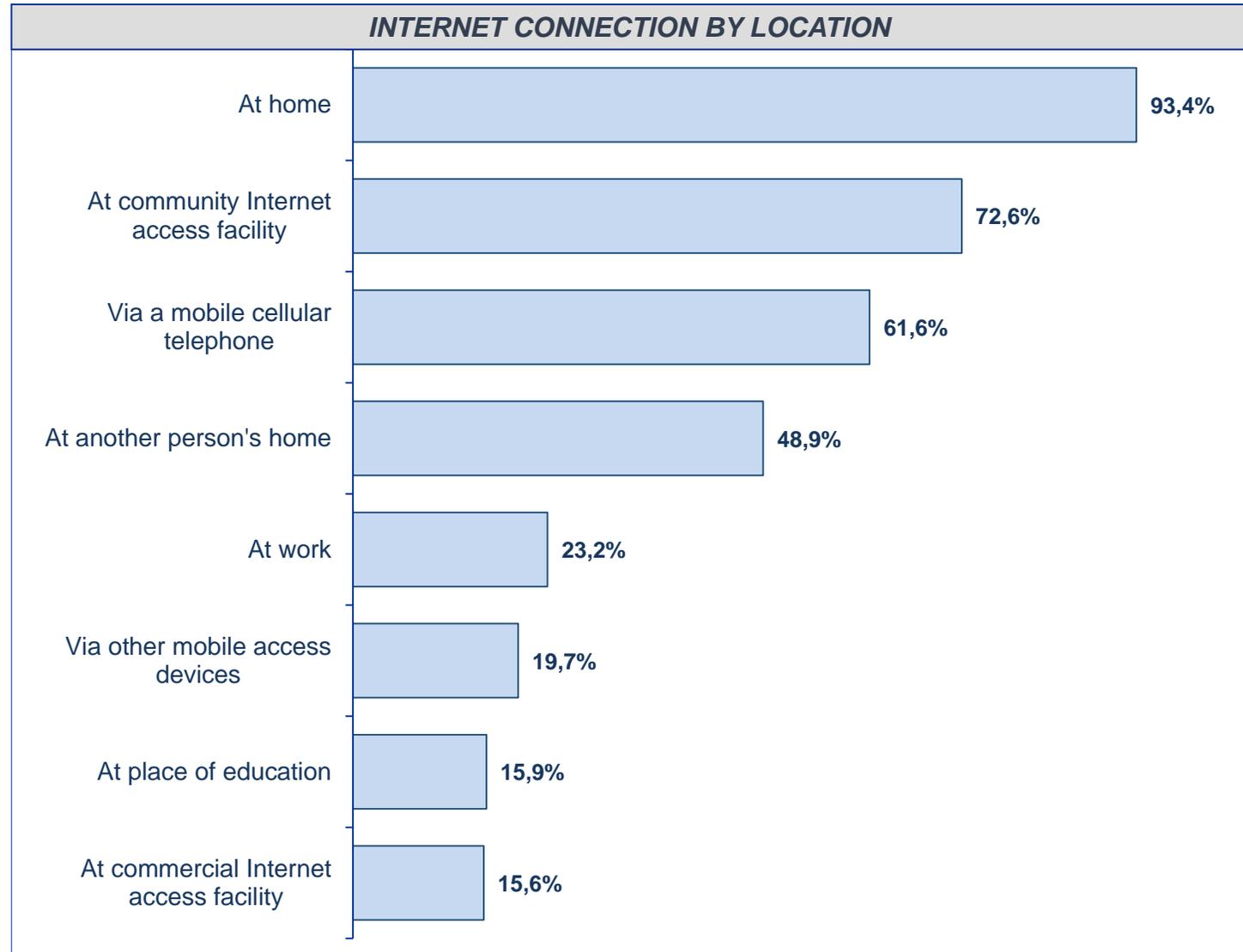
- Almost half of Internet users spend over an hour on the Internet via a mobile phone : 57.8% for personal use and 44% for professional or educational use.

- Daily Internet connection times are longer for personal use than for professional and educational purposes.



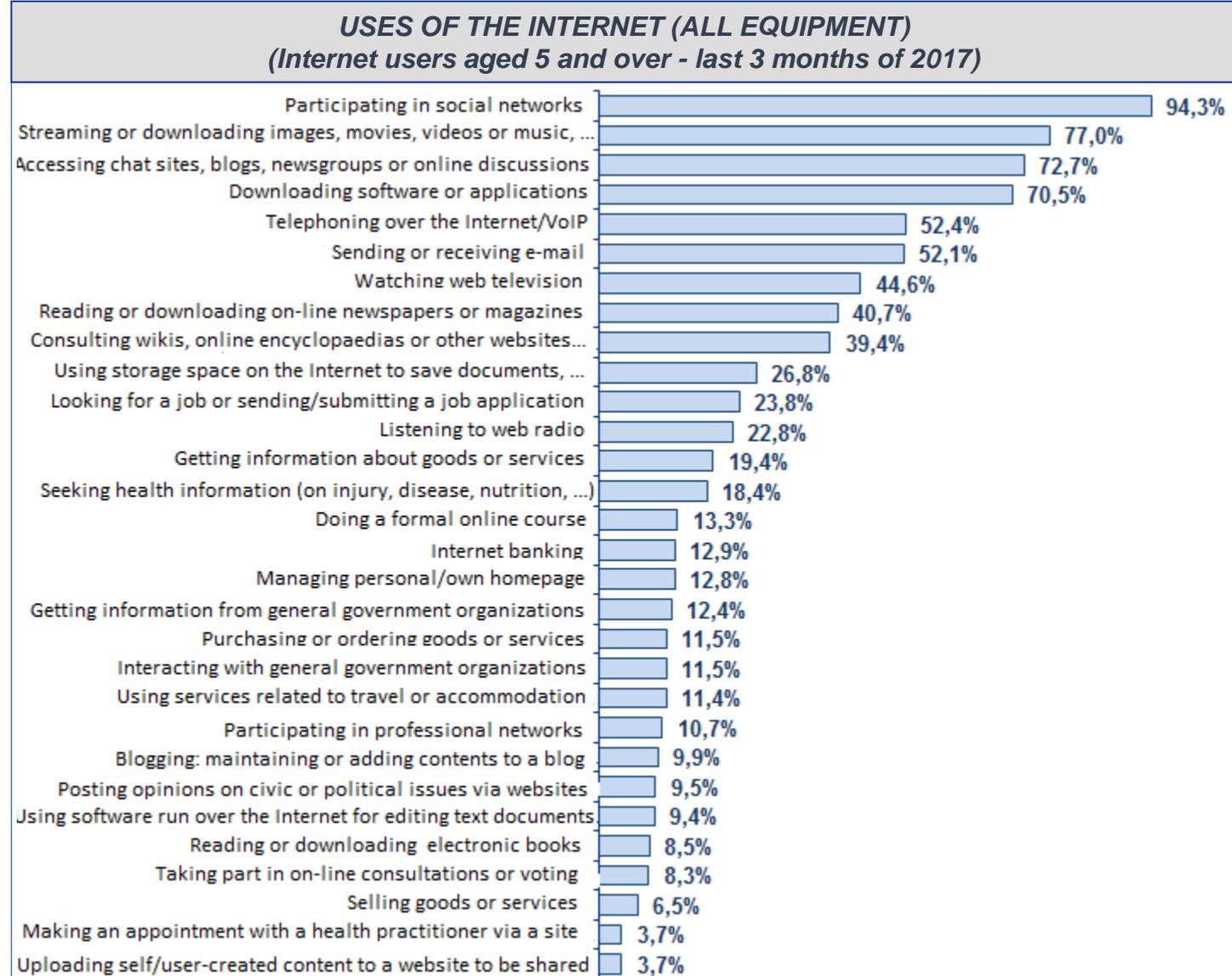
The home comes at the top of the connection locations, followed by the free access centers

93.4% of Internet users say they access the Internet from home.



Uses that have rates of practice that range between 1 out of 10 Internet users (publish personal content) and 9 out of 10 Internet users (participate in social networks)

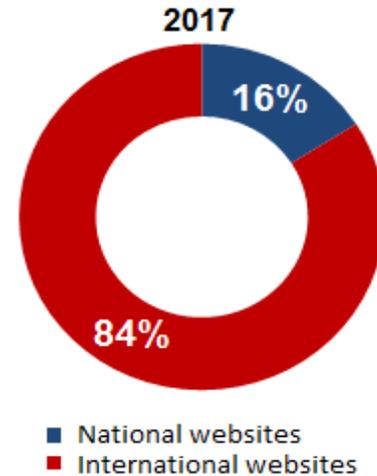
- The uses are growing as they are available at will (social networks, downloads, sites of chat, ... etc.).
- It is different when the uses require a service availability (appointment with the doctor) or a particular skill (keep a blog).



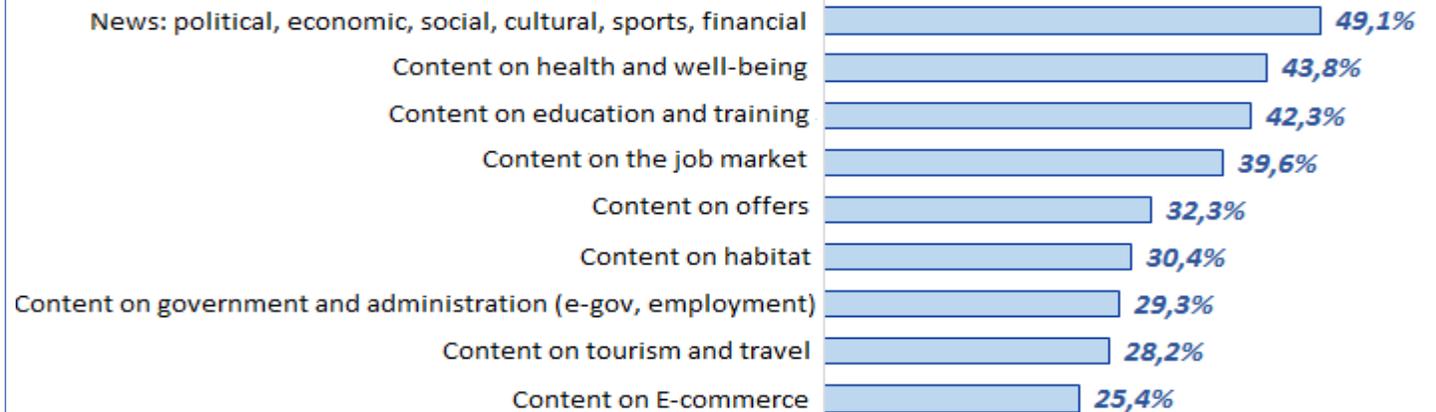
84% of web sites viewed by Internet users are international

The international sites being the most numerous and the richest in contents are cited as sites of high traffic.

TYPE OF THE MOST VISITED WEBSITES BY INTERNET USERS

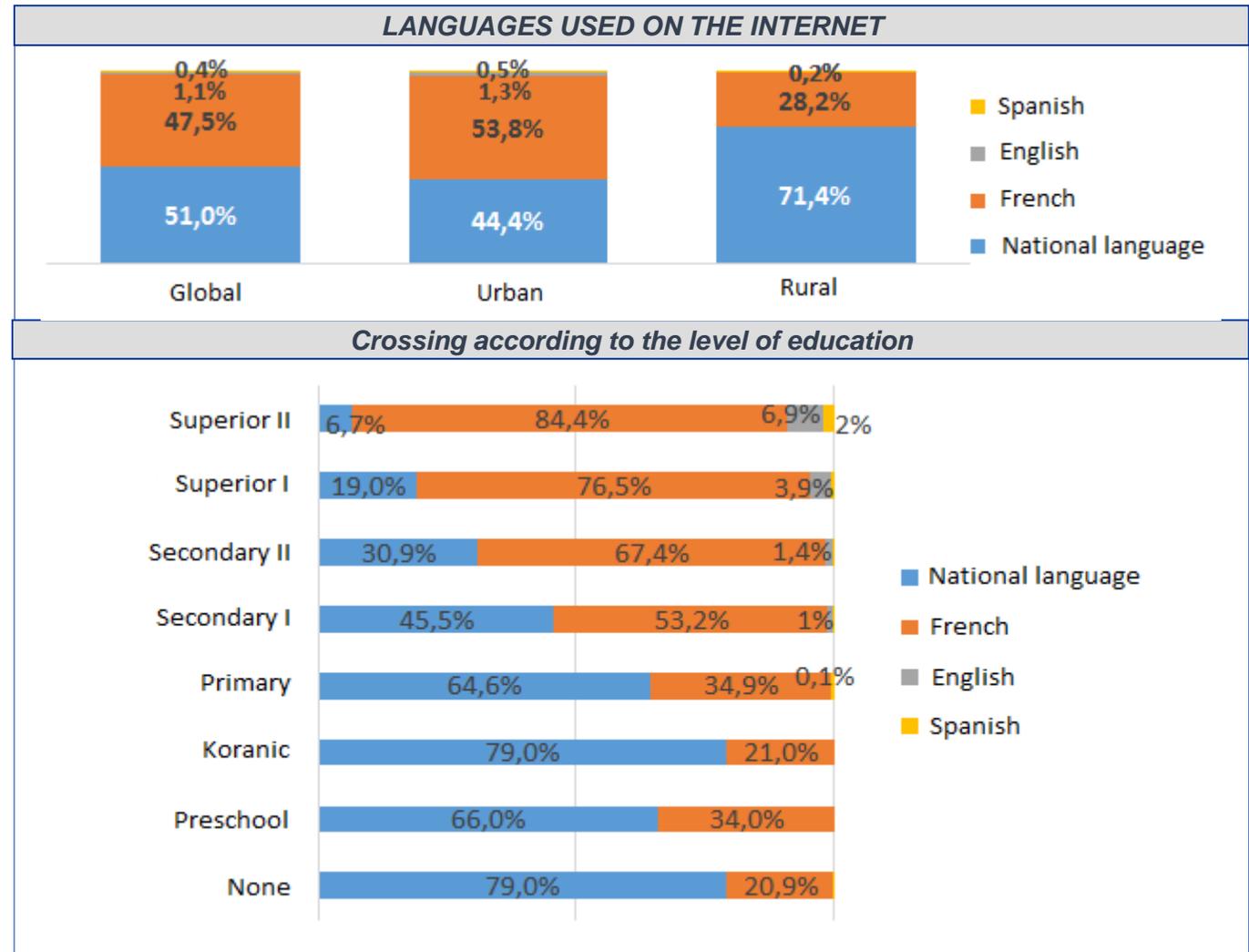


DESIRED CONTENT ON NATIONAL WEBSITES



Moroccan Internet users use both the national language and the French language

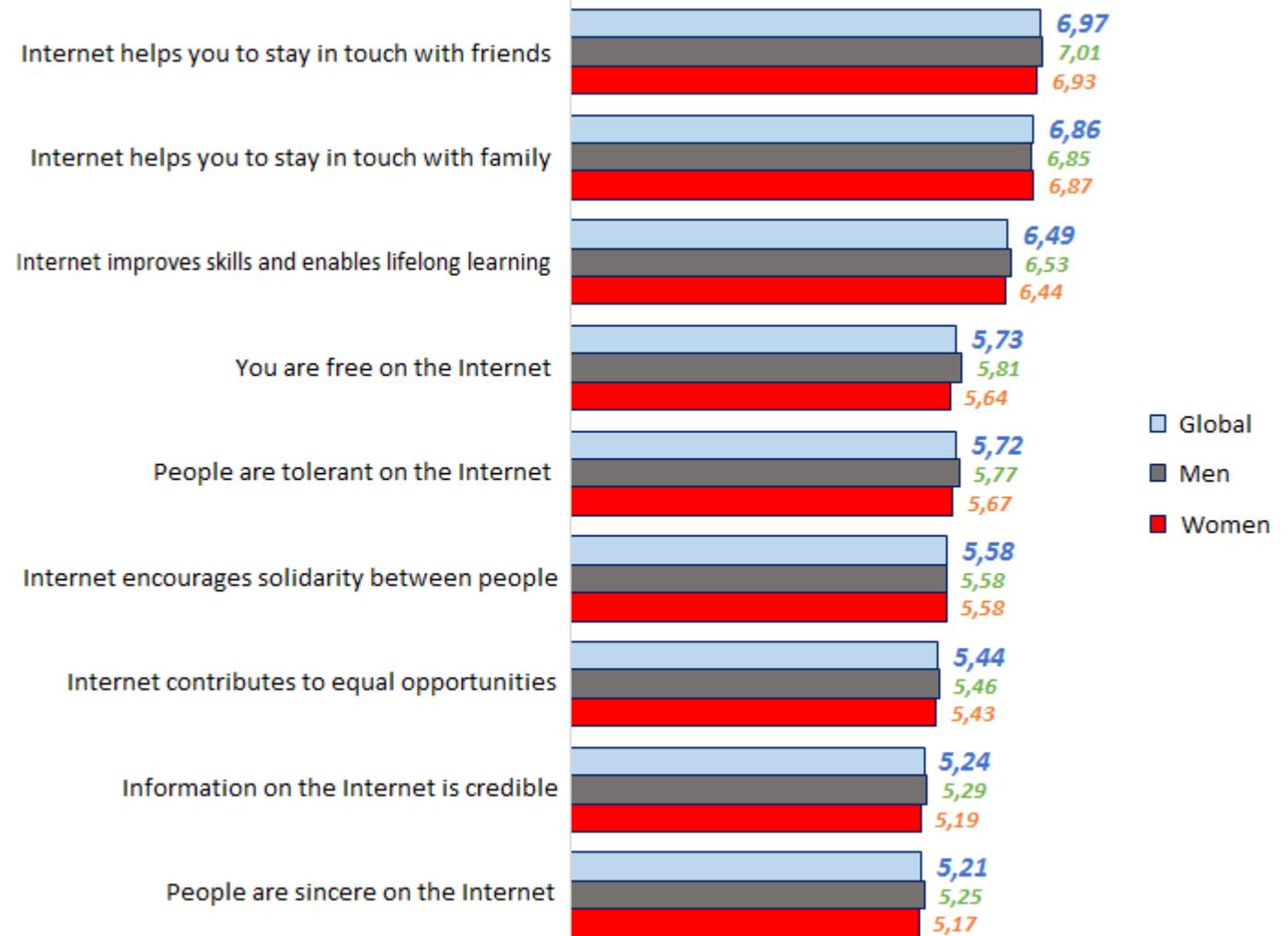
- In rural areas, 71.4% of Internet users use the national language.
- English and Spanish languages are only used by individuals with higher education.



Mixed attitudes of Internet users toward the benefits of the Internet

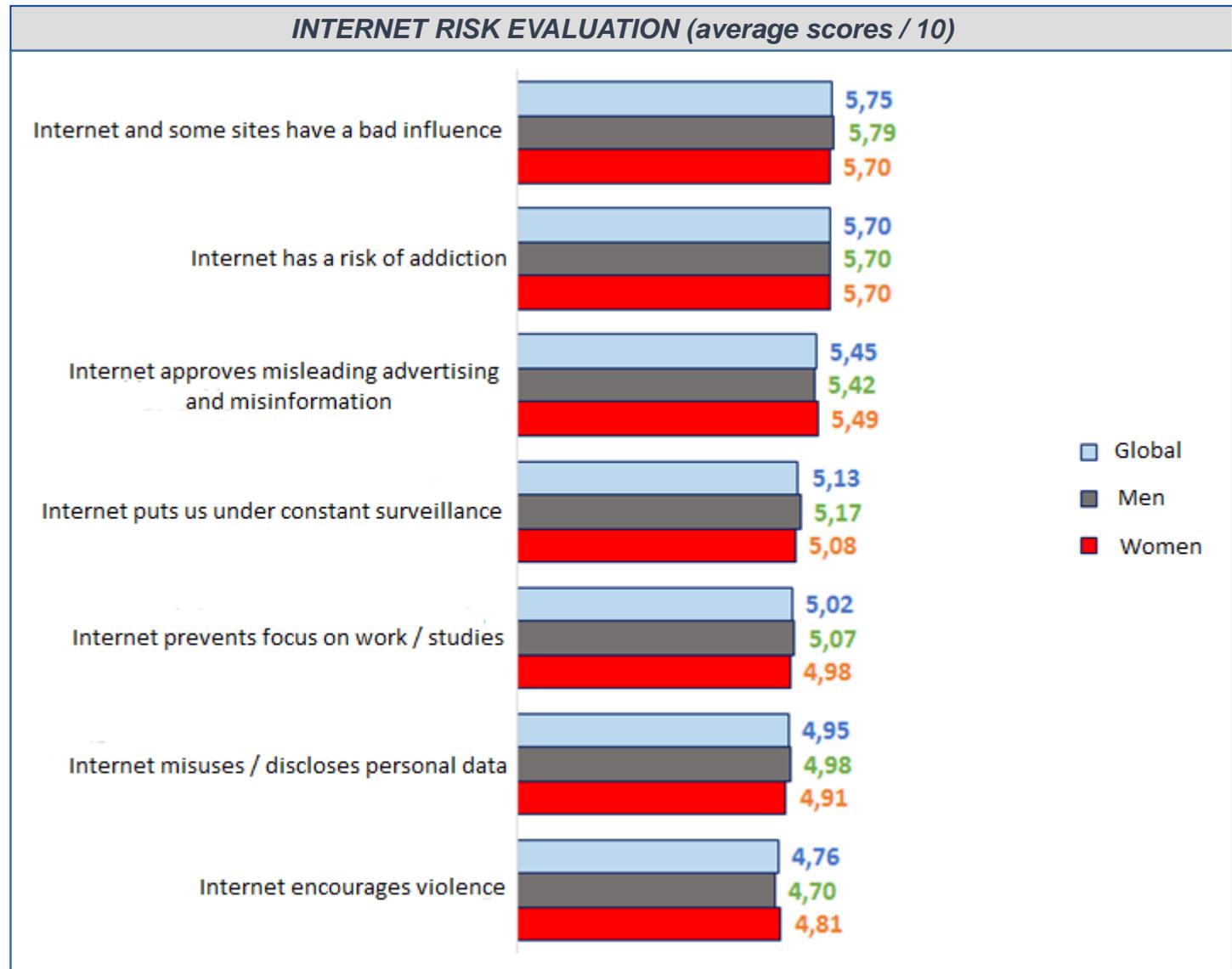
- Internet users position social utility at the forefront of the benefits of the Internet. They consider it has a good contribution in terms of skills building and learning.
- On the other hand, they are skeptical about the credibility of the information that is disseminated on the Internet.

INTERNET USERS EVALUATION OF INTERNET BENEFITS (average scores /10)



Internet users keep an equal distance vis-à-vis the potential risks of Internet

- Internet users do not fully aware of the risks of using the Internet.
- According to Internet users, the highest risks of the Internet would be the bad influence of some websites and the risk of addiction.



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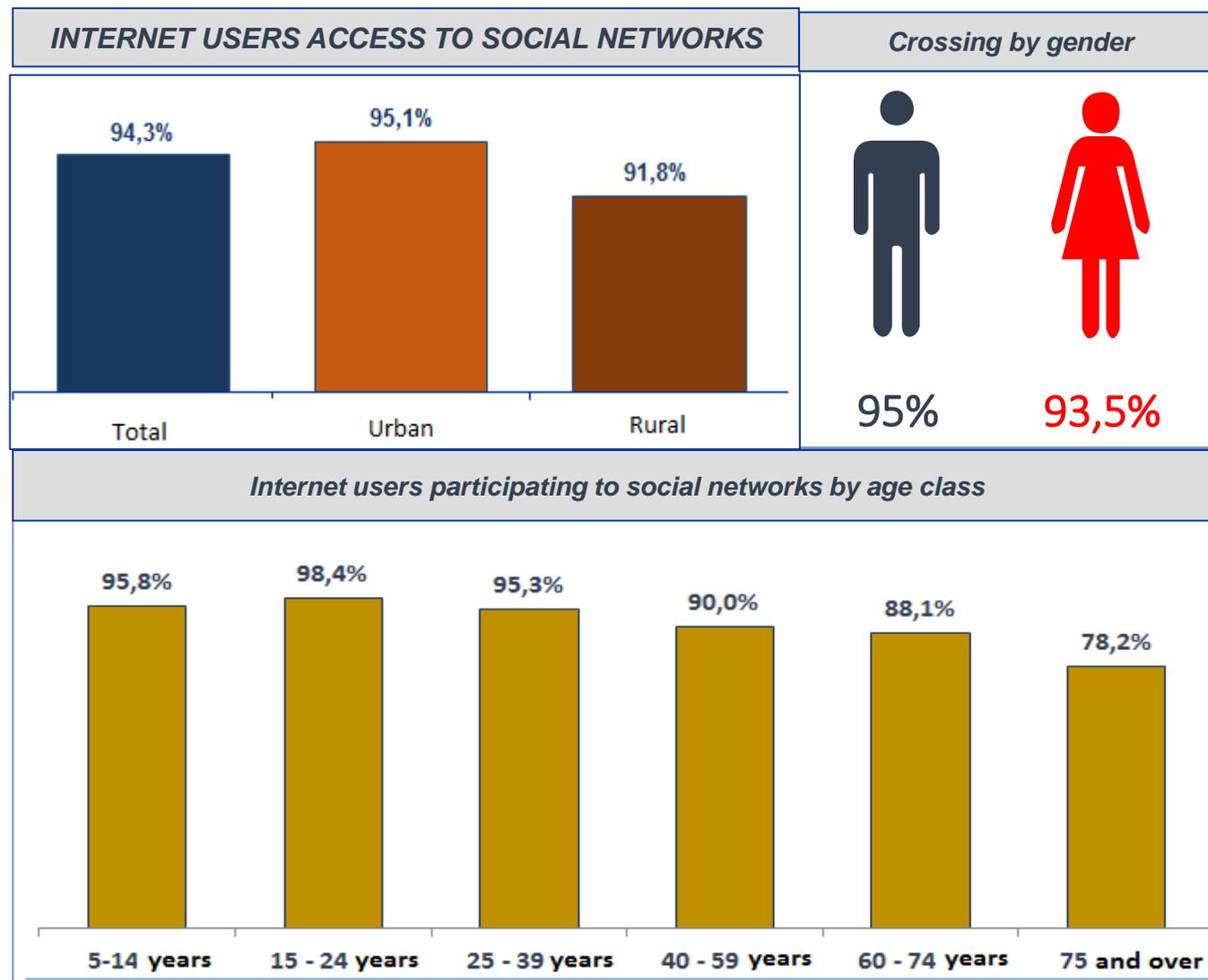
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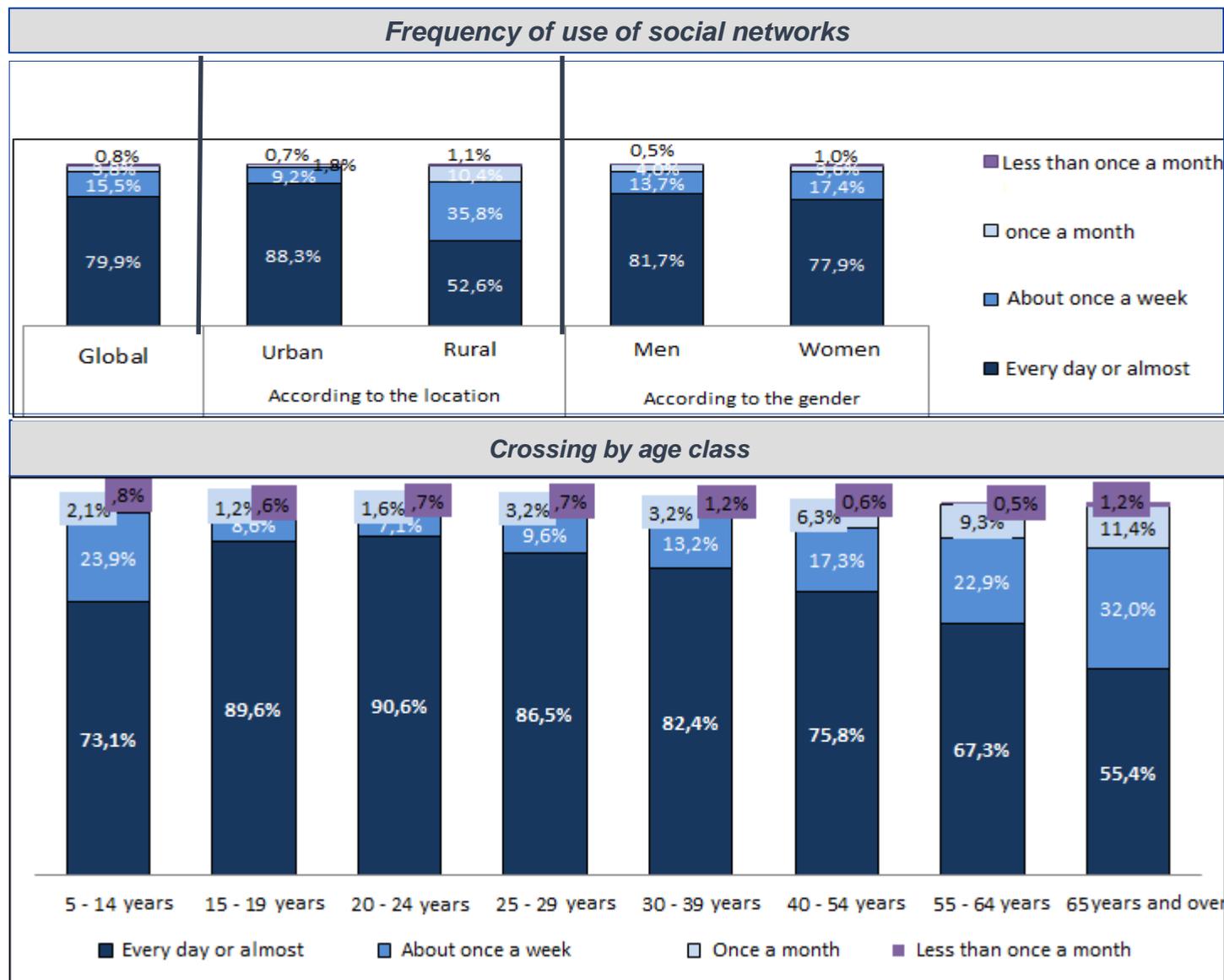
**94.3% of Internet users aged 5 and over accessed social networks in the last three months.
98.4% of young Internet users aged 15 to 24 access social networks**

- The practices for social networks are not very disparate depending on the gender and the habitat environment.
- 9 out of 10 children are accessing social networks. As much for 25-39 year olds.
- No age group is excluded since 8 out of 10 people among Internet users aged 75 and over are using social networks.



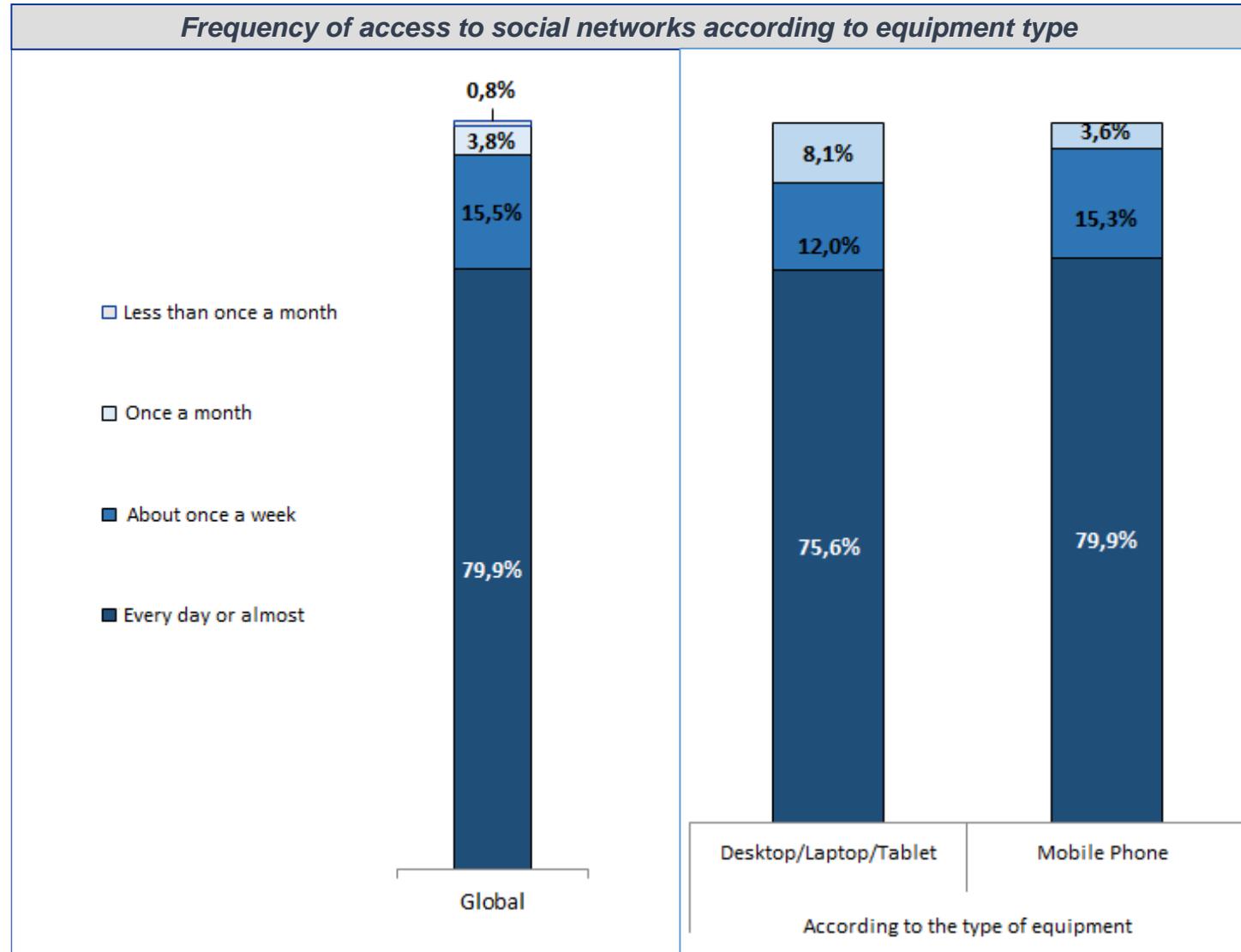
Social networks are visited every day by 90.6% of young Internet users aged 20 to 24

Young people aged 20 to 39 years access social networks every day for more than 80% of them.



Access to social networks is daily for 8 out of 10 Internet users

- Internet users use the mobile phone more than the computer or tablet to access social networks on a daily basis.
- However, nearly 95% access to social networks every day or at least once a week.

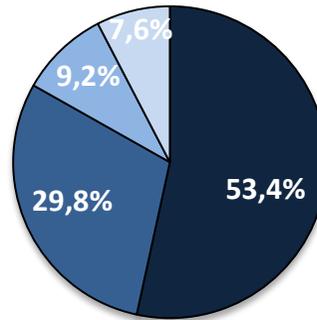


More than half of the daily users of social networks spend less than an hour

One out of 10 Internet users access social networks between 2 to 4 hours per day.

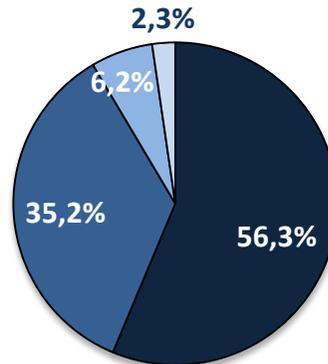
DURATION OF USE OF SOCIAL NETWORKS

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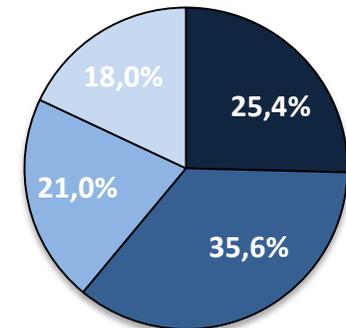


- Less than an hour
- 1 hour to 2 hours
- 2 hours to 4 hours
- More than 4 hours

DURATION OF USE OF SOCIAL NETWORKS ON THE MOBILE PHONE

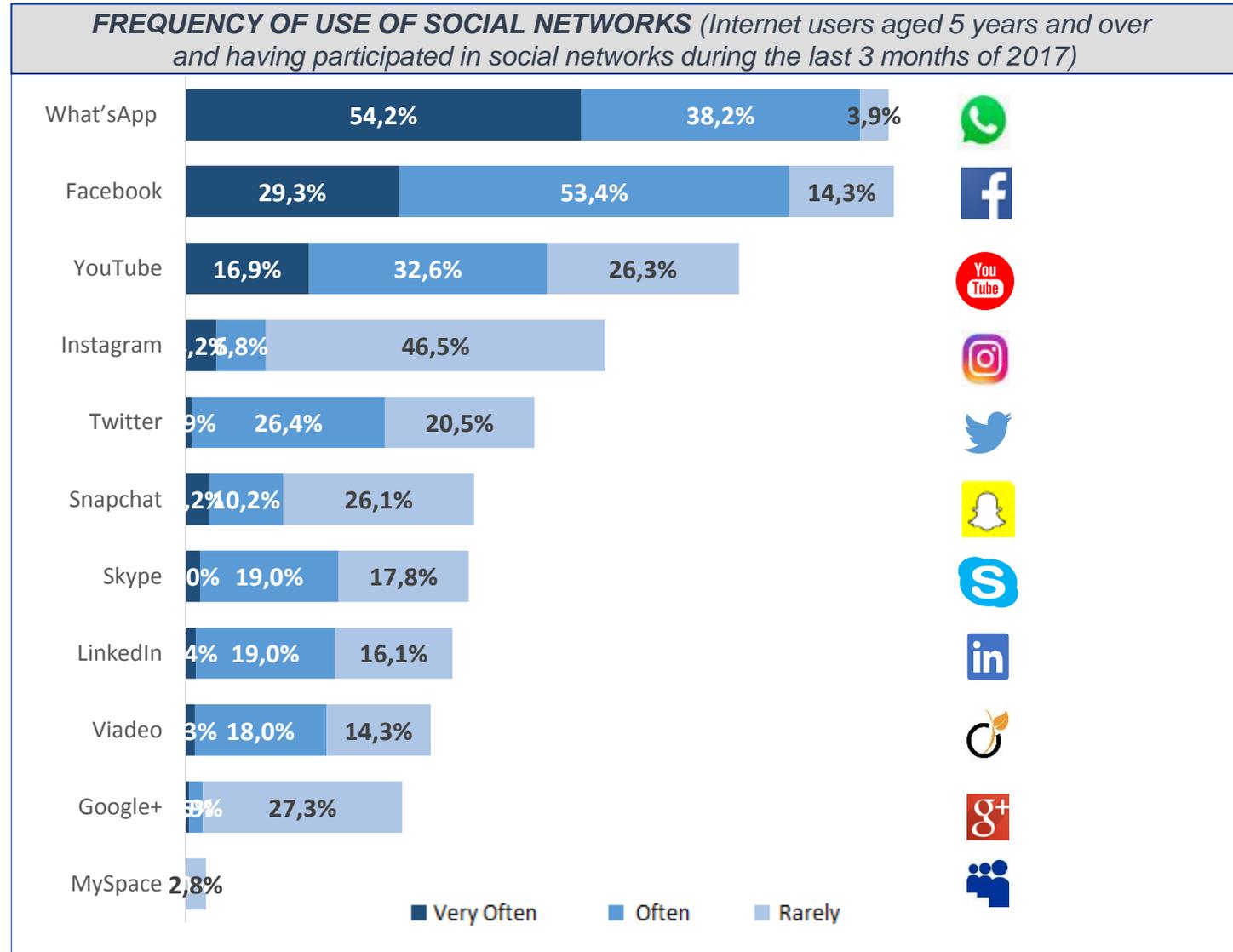


DURATION OF USE OF SOCIAL NETWORKS ON DESKTOP/LAPTOP/TABLET



The highest usage frequency is on What's App : 54.2% of Internet users say they access it very often

- What's App, Facebook and YouTube are the most accessed networks by Internet users.
- Professional social networks are frequently accessed by more than one out of five users.



Summary

C ICT Usage by Individuals

1 Mobile Telephony

2 Computer and Tablet

3 Internet

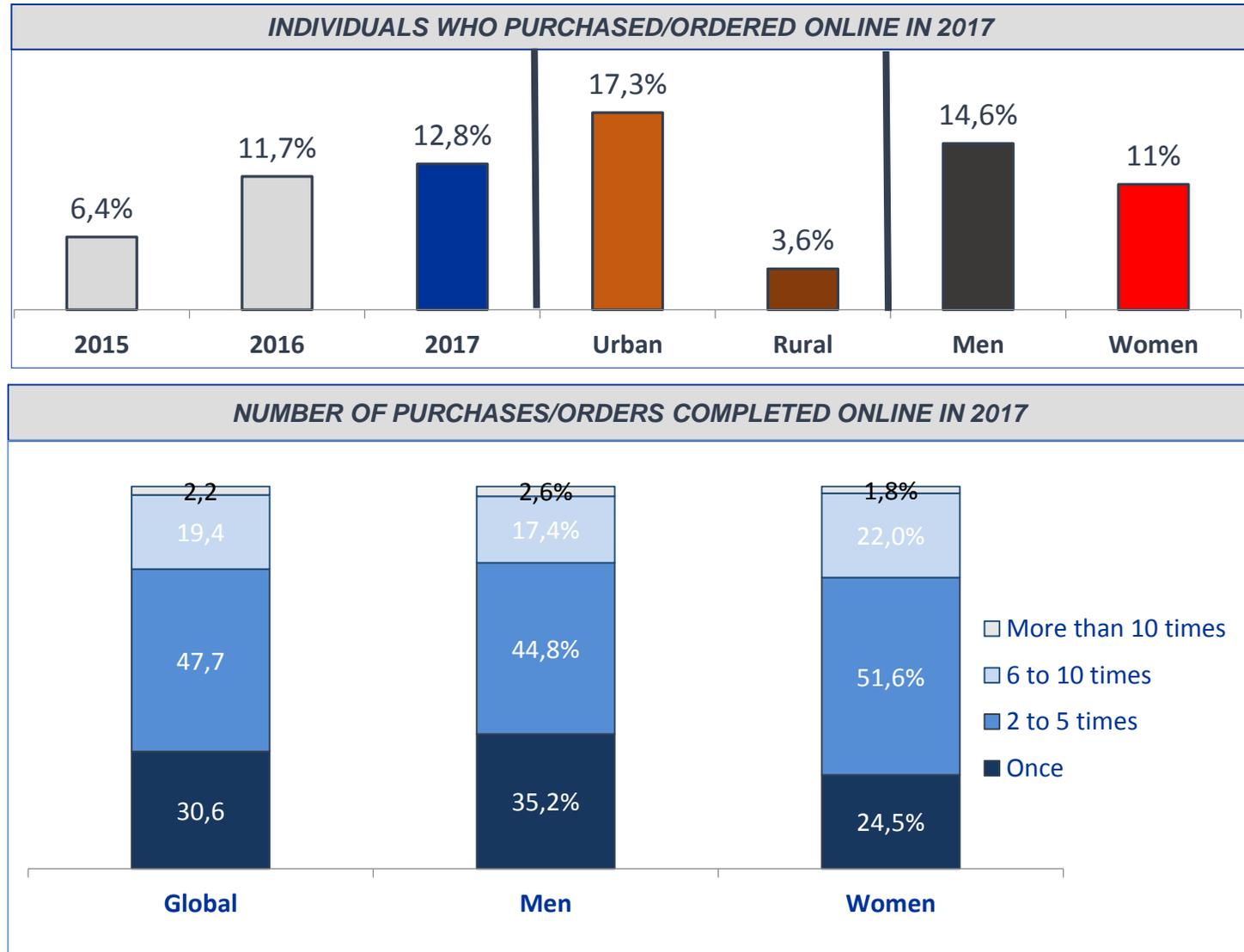
4 Social Networks

5 **Online Shopping**

6 Risks related to Online Security

Online shopping gradually enters the practices

The proliferation of e-commerce sites as well as the resort to sellers with special offers (via sites) promotes the online purchase .

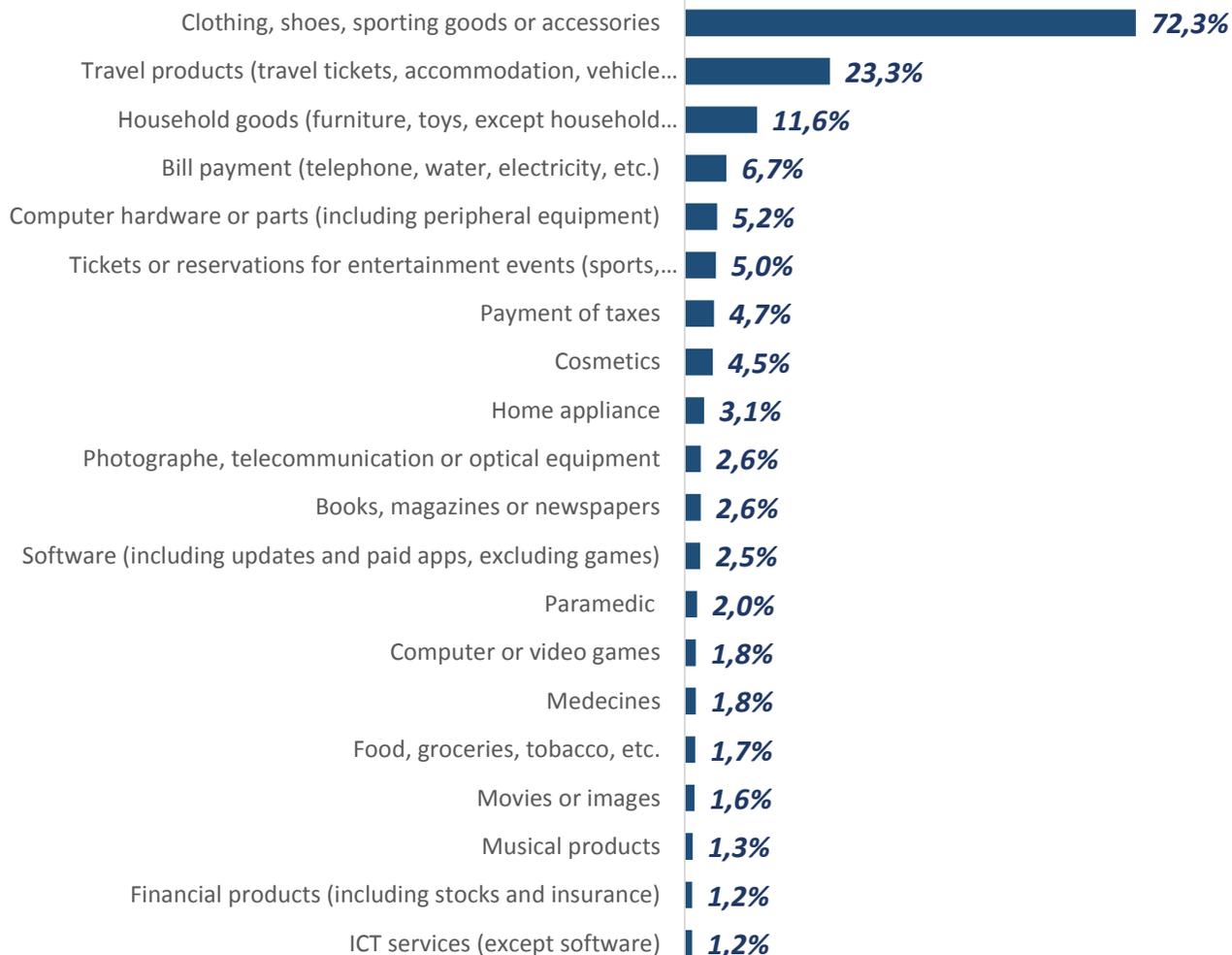


Clothing leads the way in online shopping (72.3%) followed by travel products (23.8%) and household goods (11.9%)

- Personal uses characterizes almost all the purchases.
- Purchases are quite weak when they compete with local sources of supply (groceries) or a decision based on the differentiation of products according to the quality or the technical specificities (household appliances).

CATEGORY OF PRODUCT/SERVICE PURCHASED OR ORDERED ONLINE

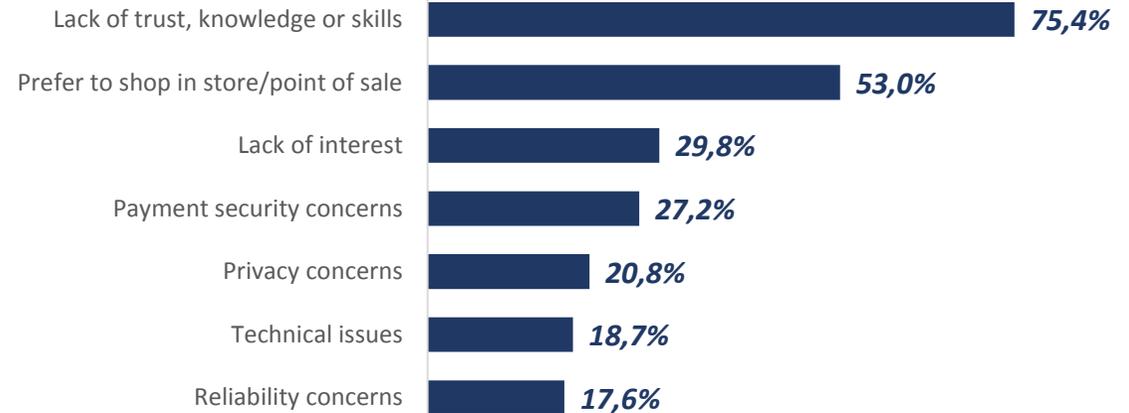
(Individuals aged 5 and over who purchased online in 2017)



Reasons and brakes to online shopping

- For more than three quarters of Internet users who do not purchase on the Internet, the lack of trust or knowledge is a major obstacle.
- Saving time is the main motivation to buy online.

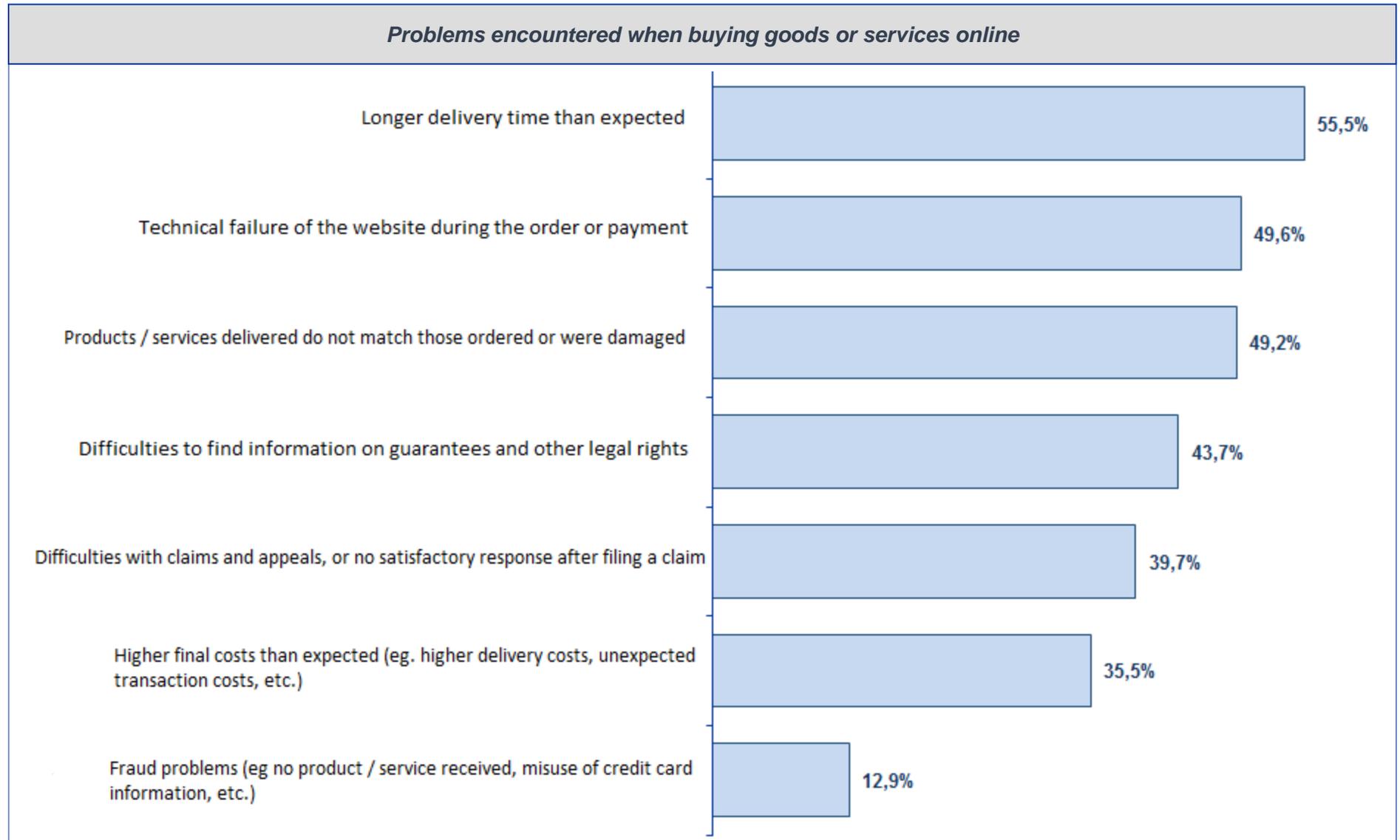
BRAKES WHICH PREVENT BUYING ONLINE



MOTIVATION TO PURCHASE ONLINE



Problems encountered when buying goods or services online



Summary

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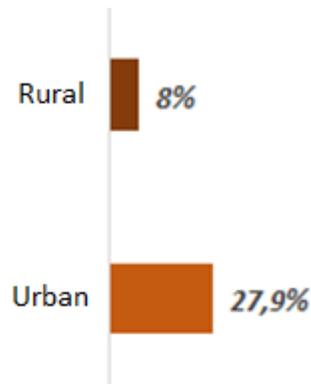
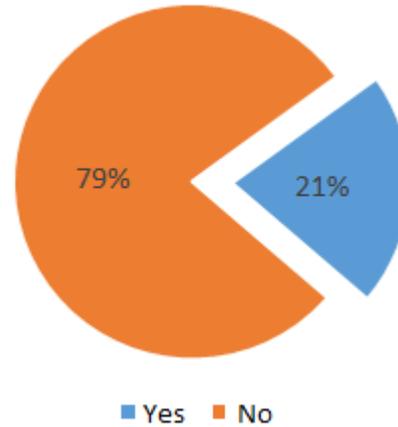
5 Online Shopping

6 Risks related to Online Security

21.4% of individuals are aware of the risks and threats of using the Internet without protection tools

- Moroccan Internet users still do not feel concerned about the security of computer systems and data protection.

CONSCIOUSNESS OF RISKS AND THREATS OF INTERNET USE WITHOUT PROTECTIVE TOOLS



26,1%



16,6%

Individuals are more familiar with antivirus as a surety tool

- Individuals opt more for antivirus.
- 75.8% of individuals do not protect themselves against the risks of the Internet because they do not have information on existing tools.

