هيئة الاتصالات وتقنية المعلومات
Communications and Information Technology Commission

Communications and Information Technology Commission

Internet Usage in the Kingdom of Saudi Arabia

Individuals

The Second year (2008) Report .

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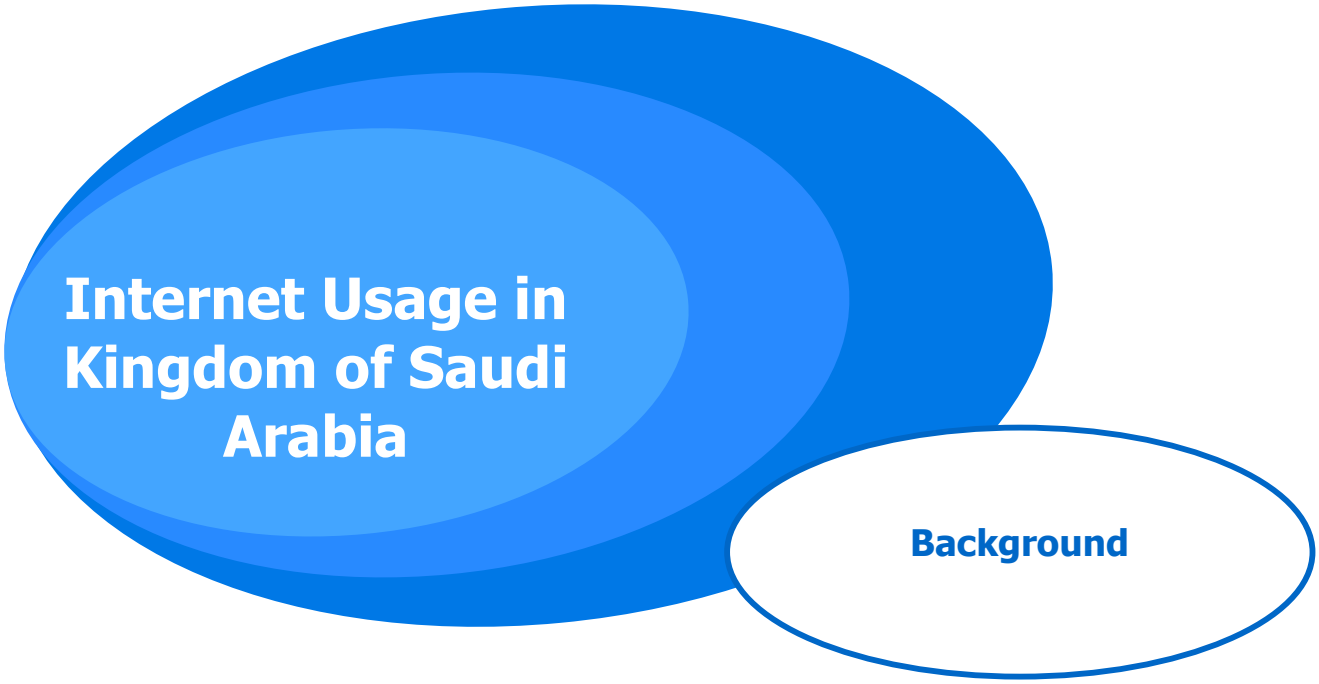

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1.0 Background

Communications and Information Technology Commission (CITC) was established under the name of (Saudi Communications Commission) pursuant to the Council of Ministers Decision No. (74) Dated 5/3/1422H. The Commission was entrusted with new tasks related to information technology to become (Communications and Information Technology Commission) under the Council of Ministers Decision No. (123) dated 21/5/1424H and the name was changed. The Mission Statement of the Commission is to ***"Ensure the provision of high quality universal telecommunications services at affordable prices"***

Internet service was officially made available in the Kingdom of Saudi Arabia in 1997. Internet is becoming an integral part of the Saudi Society and Economy. CITC wants to understand the Internet status and potential growth within the Kingdom. They wanted to outsource consultancy support for performing a comprehensive study covering a wide range of the Internet related indicators in Saudi Arabia, in addition to performing a thorough analysis of the results. Nielsen was entrusted to conduct the study in 2007. This year it has been commissioned to see how levels have changed over the course of one year.

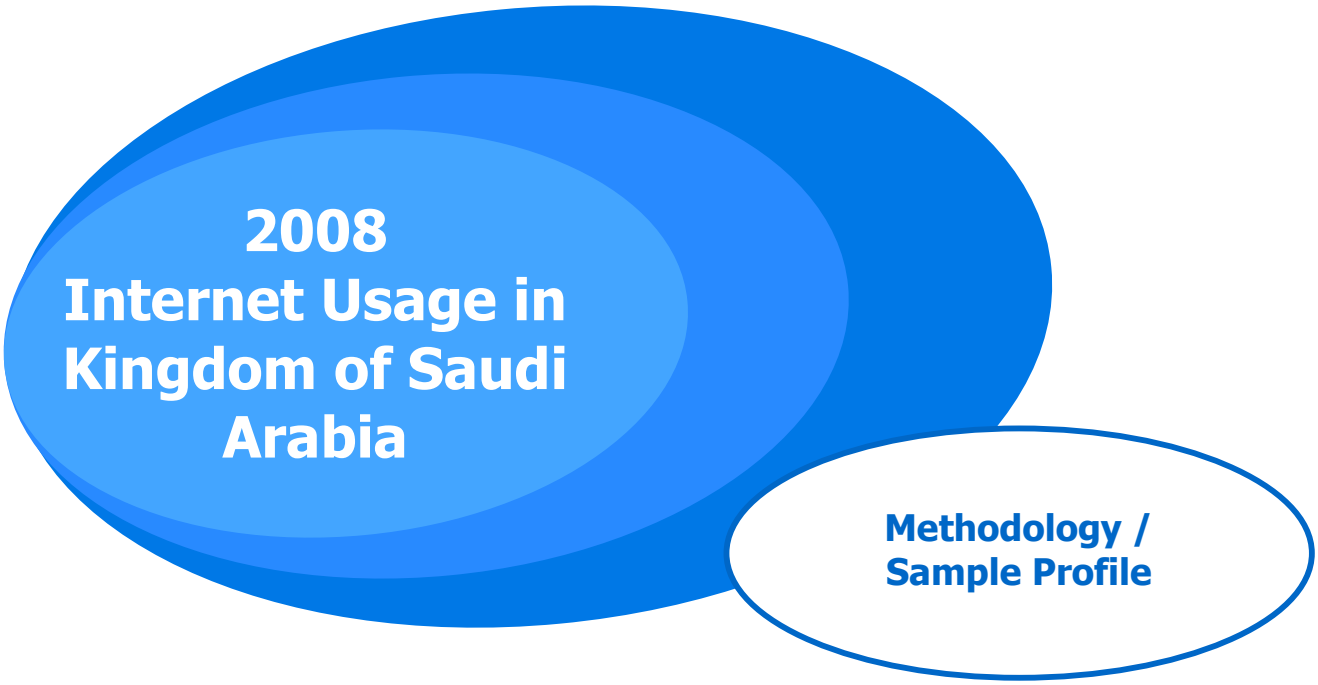
The study evaluates the current situation of Internet in Saudi Arabia. The study aims to identify the penetration levels, habits and usage patterns and the future potential of Internet in Saudi Arabia. It covers a wide range of information areas from infrastructure to satisfaction. It covers different types of users – individual users, home users, government

agencies, educational institutes and corporate users. The research was such designed, to ensure national representation. Further, the study would be repeated annually for a minimum of three times in order to measure progress and growth.

Salient Features of the Research

- **National Representation**
- **Across Customer Types : Consumers, Corporate and Government**
- **Annual Tracking to measure progress**

This document details the findings of the survey carried out among **Individuals** in the Kingdom of Saudi Arabia.


2008
Internet Usage in Kingdom of Saudi Arabia
Methodology / Sample Profile

2.0 Methodology

The detailed methodology report has been highlighted in the appendix of this report.

2.1 Research Design

- A quantitative research exercise was conducted.
- **A total of 8943 interviews were conducted**
- People across the country were interviewed.

2.2 Target Respondents

- Respondents interviewed for the survey were from general population across socio-economic classes, genders and nationalities who were more than 15 years old.
- Interviews were conducted at the place and time as per respondent's convenience.

2.3 Coverage and Sampling

- Interviews were conducted across all the regions urban, semi-urban and rural areas representing the total population of Saudi Arabia.

- Households were contacted using a combination of Stratified Area Sampling and Snowball Sampling. The detailed methodology is explained in the appendix.

2.4 Research Instrument

- Interviews were conducted using a structured questionnaire. The questionnaire was translated into Arabic. Interviews were done in Arabic / English as convenient to the respondent.
- The questionnaires were a mix of close and open-ended questions.
- The length of the listing interview was around 10-15 minutes while the detailed interview was approximately 30-35 minutes long.

2.5 Quality Control

- Rigorous quality controls were followed at both the field and data processing levels. A minimum of 25% of the questionnaire were back checked by the Field Supervisors and Field Managers.
- At the data processing stage, questionnaire which were not filled in properly were rejected and only after ensuring 100% cleaned data were considered for the analysis.
- For details on the Quality Control standards please refer to the CITC Inception Report Section 6 and 7.

3.0 Sample Profile

In total, 8943 people were contacted for the purpose of this research. The following provinces were covered in the sample which is in line with the total population.

Exhibit 3.1 Sample Composition by Provinces

	2007	2008
Base: All respondents	**7570**	**8943**
Riyadh	25%	26%
Qassim	7%	5%
Makkah	24%	27%
Madinah	7%	7%
Eastern	16%	13%
Assir	6%	7%
Baha	2%	2%
Najran	2%	2%
Jizan	4%	2%
Arar	1%	1%
Jouf	1%	1%
Hail	2%	2%
Tabuk	3%	4%

Exhibit 3.2 Sample Composition by Age groups

	2007	2008
Base: All respondents	**7570**	**8943**
Below 15 years	-	16%
15 – 24 years	29%	27%
25 – 34 years	29%	28%
35 – 44 years	21%	17%
45 – 54 years	11%	12%
55 – 60 years	10%	1%

2008 Internet Usage in Kingdom of Saudi Arabia

Detailed Findings

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4.0 Infrastructure & Investments

4.1 Computer Penetration

Computer ownership among individuals currently stands at 77% for 15 to 60 yrs. population. However when we calculate at the total population/household level the ownership stands at 49%, an increase from 43% in 2007.

	2007	2008
Total population of KSA	23,980,834	25,035,000
Population of 15 to 60 years old	15,107,925 (63% of Total population)	15,772,050 (63% of Total population)
Computer owners – 15 to 60 years old	10,273,389 (68% of 15 to 60 year olds)	12,207,567 (77% of 15 to 60 year olds)
Computer owners out of the Total population	43%	49%

(*source: www.cdsi.gov.sa Population and Housing Characteristics in the Kingdom of Saudi Arabia Demographic Survey 1428H 2007)

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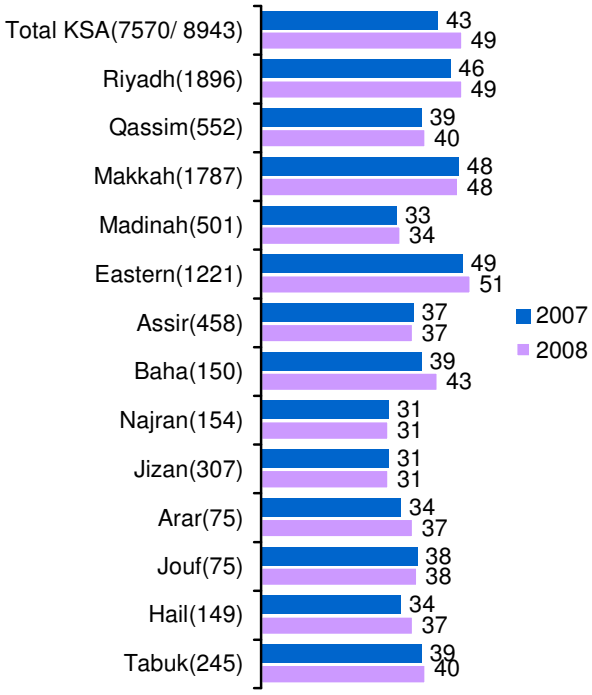
Exhibit 4.1 Computers Penetration by Provinces



Base : All (Including population less than 15 years old)

From 2007, there is a minor increase in levels for 2008 if it is analyzed per province. Computer ownership is higher among the higher social classes, 89% of those in A/B social class own a computer while only 59% of those in D/E.

There is a slight increase in the ownership of computers in the kingdom. But ownership of laptops is increasing, with almost 60% now owning this device.

3 out of 5 households in Saudi Arabia own a computer

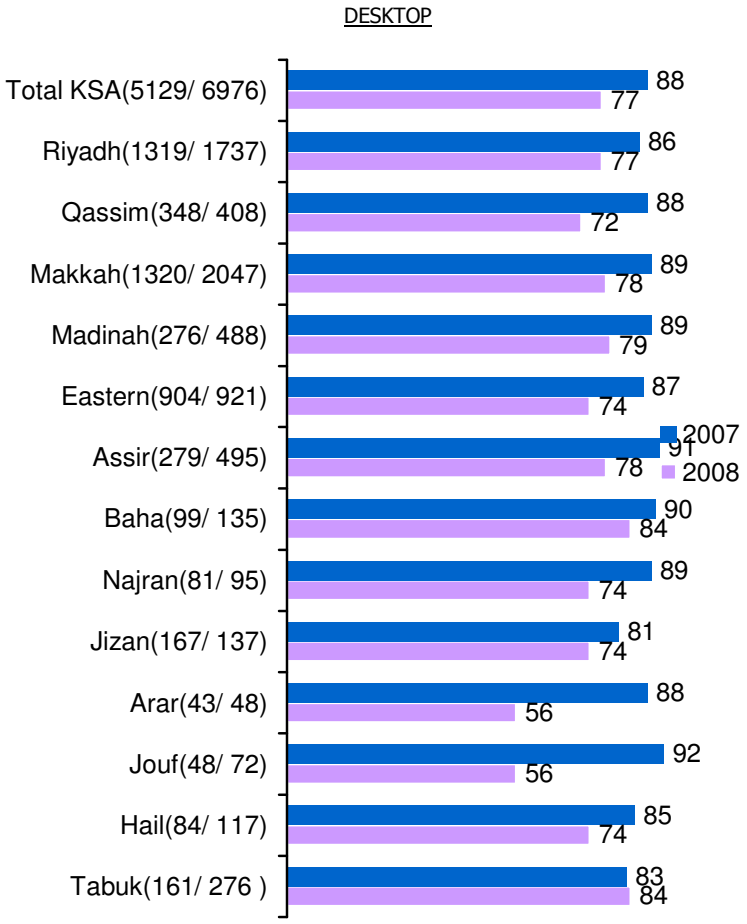
Little less than half the households own a laptop

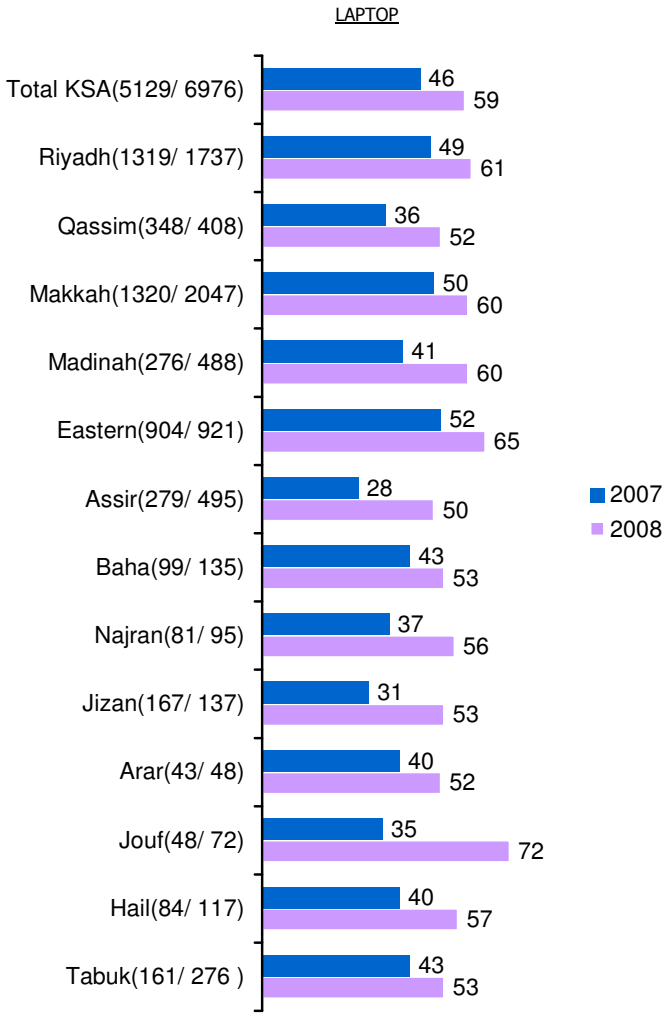
4.2 Devices

In 2007 Saudi was predominantly a desktop market, however, there has been a notable shift in the past year, with more and more Saudi's opting for a laptop over a desktop. Desktop computers have seen a decline from 88% of total population ownership in 2007 to just 77% in 2008.

Laptop penetration has increased from 46% at a total level in 2007 to 59% in 2008. All areas are driving this shift, but most noticeable is the shift in Jouf, Assir, Madinah. In Arar and Jouf are the two key areas where laptop ownership has overtook desktop computer ownership.

Exhibit 4.2 Types of computer devices owned by Provinces





Base : All owners of Computer Devices

Note: PDA ownership is very low and does not show differences by provinces and hence not shown

4.3 Number of Computers owned

The number of desktop computers owned is also decreasing; there are fewer desktop owners who own more than one desktop – less than 10%. While those owning desktops are decreasing, those owning more than one laptop is increasing year on year from 11% to 15%. Those in a higher social class are more likely to own more than one computer device.

Exhibit 4.3 Number of PC types owned

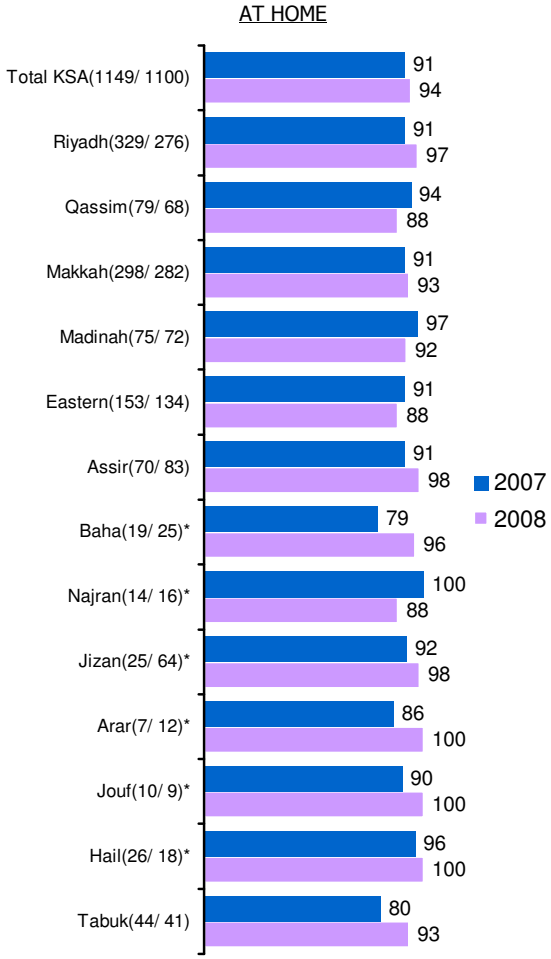
	DESKTOP		LAPTOP		PDA	
	2007	2008	2007	2008	2007	2008
Base: All owning a PC device	4488	5337	2357	4128	48	76
One	91	93	84	78	92	71
Two	7	6	11	15	4	18
Three	1	1	3	4	4	7
More than three	1	1	2	3	-	4

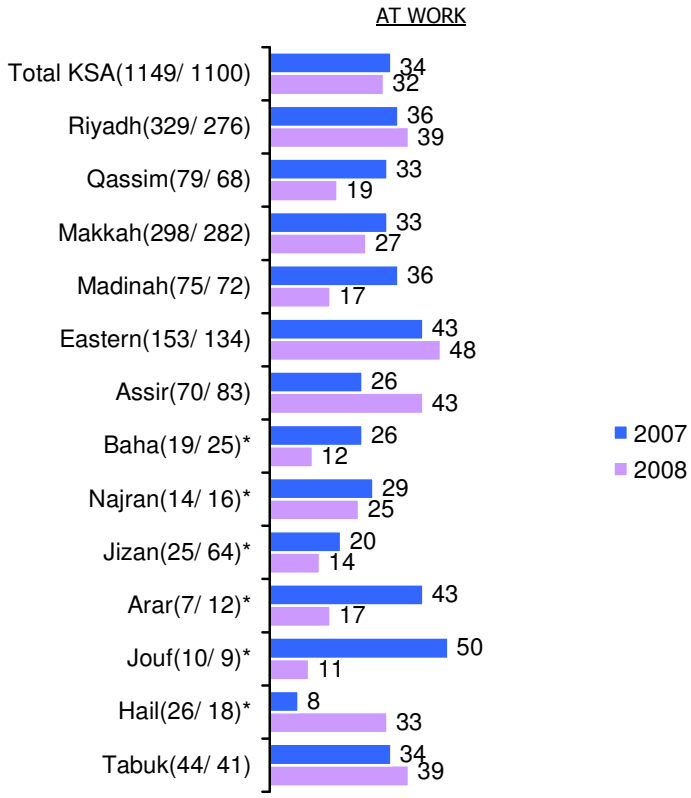
4.4 Location of usage

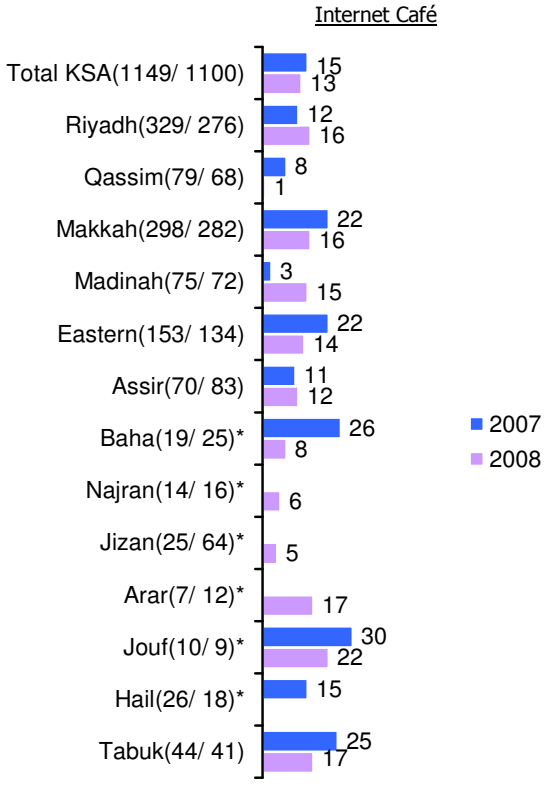
Home use of computers is still the most common; this has increased further since 2007 to 94%. However, there are areas which are decreasing in home use, such as Najran, Qassim and Madinah.

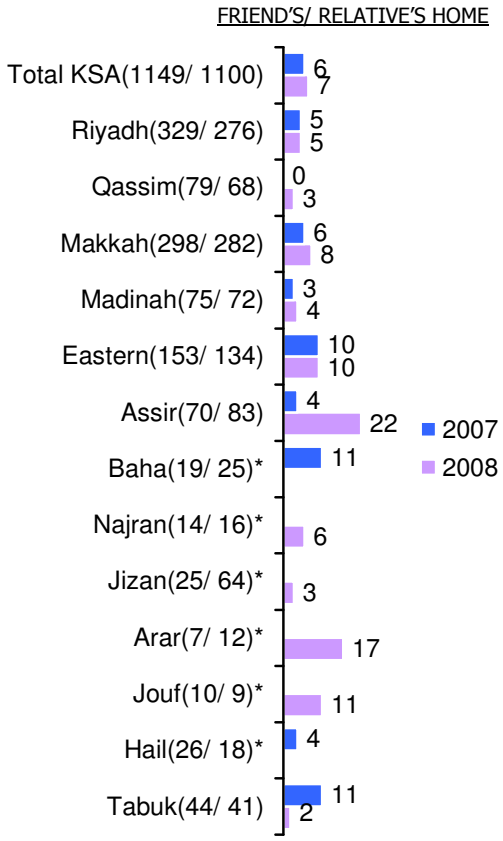
While at home use is increasing this is supported by a marginal decrease in using computers at work (from 34% to 32%) and at internet cafés (15%to 13%).

Exhibit 4.4 Location of usage by Provinces




AT WORK
Total KSA(1149/ 1100)
34
32
Riyadh(329/ 276)
36
39
Qassim(79/ 68)
33
19
Makkah(298/ 282)
33
27
Madinah(75/ 72)
36
17
Eastern(153/ 134)
43
48
Assir(70/ 83)
26
43
Baha(19/ 25)*
26
12
Najran(14/ 16)*
29
25
Jizan(25/ 64)*
20
14
Arar(7/ 12)*
43
17
Jouf(10/ 9)*
50
11
Hail(26/ 18)*
8
33
Tabuk(44/ 41)
34
39
2007
2008


Internet Café
Total KSA(1149/ 1100)
15
13
Riyadh(329/ 276)
12
16
Qassim(79/ 68)
8
1
Makkah(298/ 282)
22
16
Madinah(75/ 72)
3
15
Eastern(153/ 134)
22
14
Assir(70/ 83)
11
12
Baha(19/ 25)*
26
8
Najran(14/ 16)*
6
Jizan(25/ 64)*
5
Arar(7/ 12)*
17
Jouf(10/ 9)*
30
22
Hail(26/ 18)*
15
Tabuk(44/ 41)
25
17
2007
2008



*Note: * Base too small to analyze*

As computer usage moves more into Saudi's homes, the popularity of internet cafes is diminishing. Only 13% of people use internet cafes, the incidence of usage in internet cafes is found to be more among the younger population while it diminishes with the increasing age band, more males use internet cafes compared to females, 24% to 3% respectively.

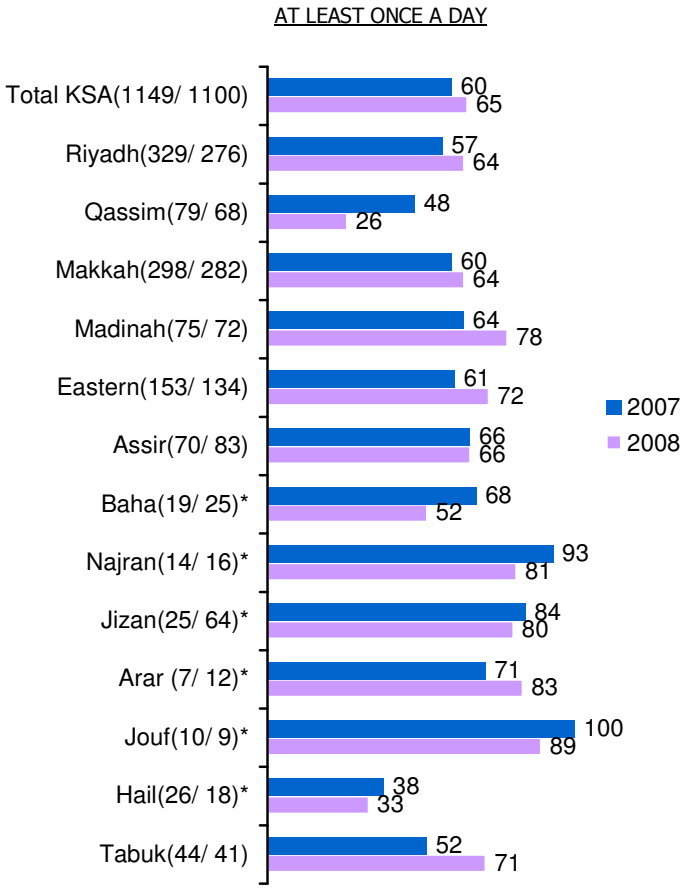
Using computers at friends or relatives house is very low in comparison with in home and at work, where the majority of computer usage takes place. However, in areas such as Assir, Arar and Jouf friends and relatives are much more prevalent.

4.5 Usage Frequency

Frequency of use is also increasing, year on year. 65% of Saudi's now use a computer everyday, compared with 60% in 2007. The increase in frequency is also seen in the decrease of those who use computers at least once a week but not everyday from 35% in 2007 to just 28% in 2008. Only 8% use

it less frequently and these are mainly women. However, to buck this trend, females are using the internet less frequently in 2008 than 2007, those using everyday has fallen from 60% to 54%.

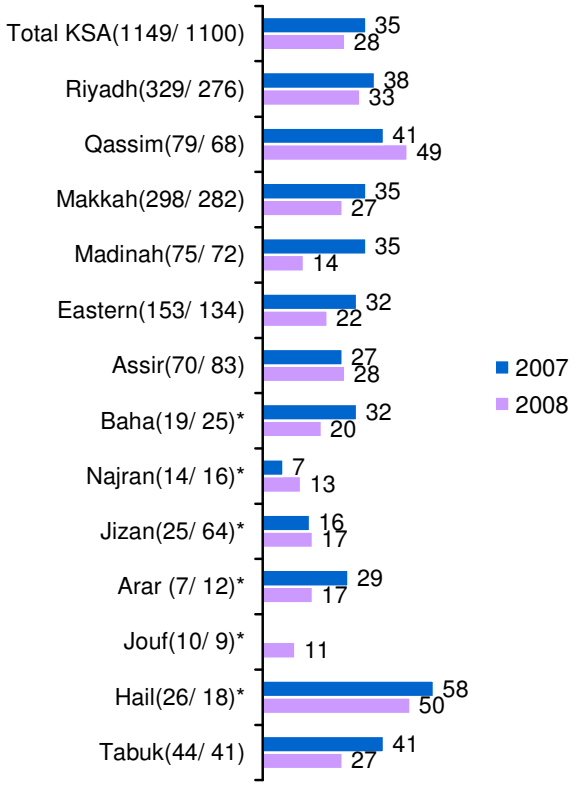
Exhibit 4.5 Frequency of usage by Provinces



Base: All users of Computer Devices

*Note: * Base too small to analyze*

AT LEAST ONCE A WEEK BUT NOT EVERYDAY



Base: All users of Computer Devices

*Note: * Base too small to analyze*

The main daily users of computers are younger in age, primarily from 15 to 34 years old. Frequency of usage of computer diminishes with increasing age group.

4.6 Reasons for using Computers

Internet surfing is the main reason for using computers in Saudi Arabia, and is becoming increasingly popular with a rise from 48% in 2007 to 53% in 2008. Communicating with people via the internet and listening to audio/watching movies are still popular, however, using computers to store documents, playing games and for educational purposes is actually decreasing year on year.

Exhibit 4.6 Main Reason for using Computers

	2007	2008
Base: All computer users	**1149**	**1100**
Surf the internet	48%	53%
Communicate with people via internet	11%	12%
Store documents	12%	7%
Play video and computer games	7%	6%
To do education related work	18%	13%
Listening to audio / watching movies	4%	6%

Among the respondents who have claimed to be non-users of Internet, 'storing personal documents' and 'play video and computer games' emerge as the key reasons to use computer.

Internet is the prime reason for using computers

The younger users (primarily 15-24), other than surfing the Internet, use the computer mainly to 'communicate with people via the internet' the highest of all age groups. They also use their computer 'to do educational work' (11%).

On the contrary, significantly lower proportion of older respondents support these two reasons. The numbers diminish further with increasing age bracket.

Among the 45 –64 years old, there is a significantly higher percentage mentioning 'storing personal documents' and 'doing official work'.

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4.7 Operating System used

Windows XP is the most widely used operating system in Saudi Arabia. In 2007, Windows XP Home was the main operating used in the region, this has decreased its usage from 64% to 56% in 2008. The shift is moving to Windows XP Professional which has grown its usage from 23% to 32%.

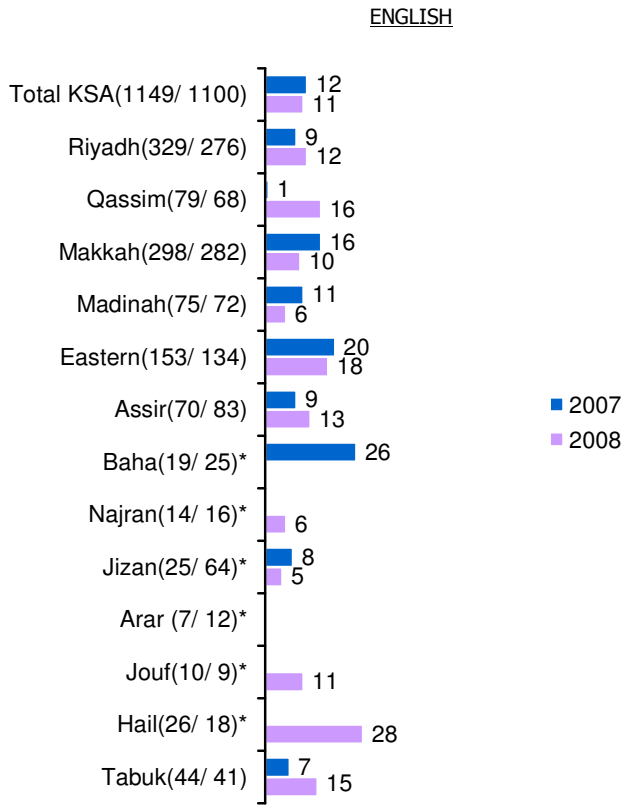
Windows 2000 is the only other significant player, with only 9% using this system, province such as Assir and Jizan have a sizeable amount of users of this system, 13% and 22% respectively.

4.8 Language of the Operating System

Arabic is the main language of operating system in use among PC users, with an increase from 70% in 2007 to 76% in 2008 using Arabic interface. English only is used just by about 11% respondents, down from 12% the previous year, with majority of them being Asians.

However, there is a variation across provinces, while overall there is an increase in owning operating systems in Arabic and a decline in English, in certain areas this is more prominent

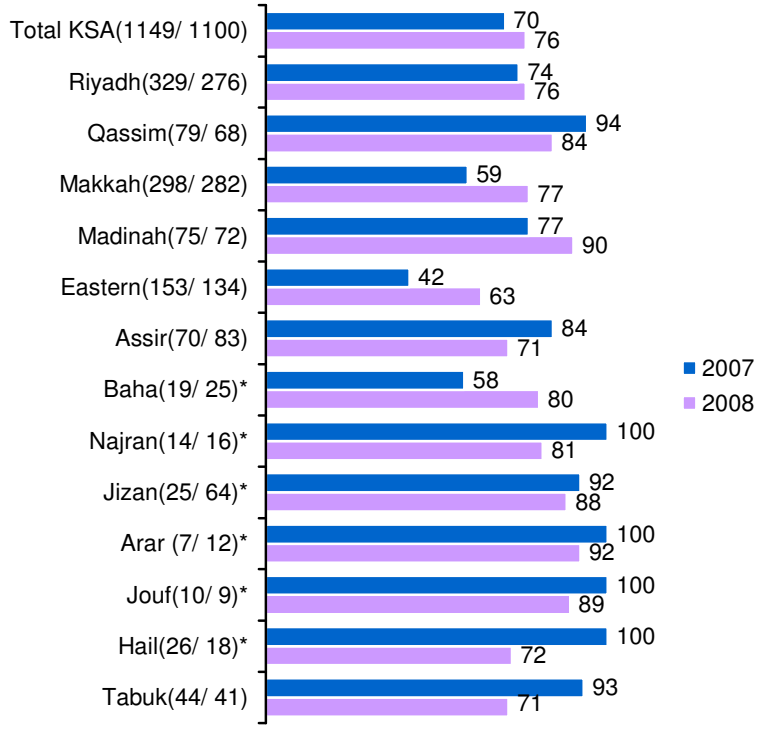
Exhibit 4.8 Operating System Language by Provinces



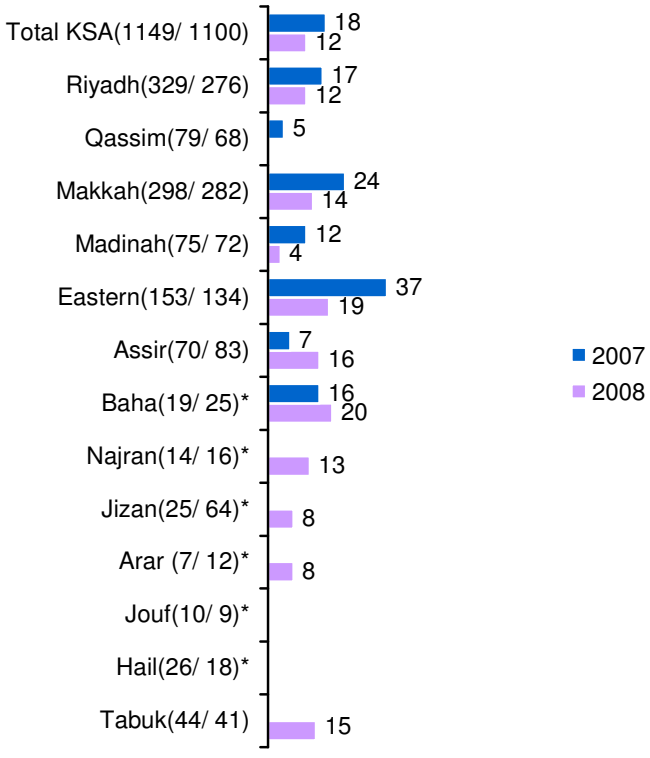
Base : All users of Computer Devices

*Note: * Base too small to analyze*

ARABIC



BOTH ARABIC AND ENGLISH



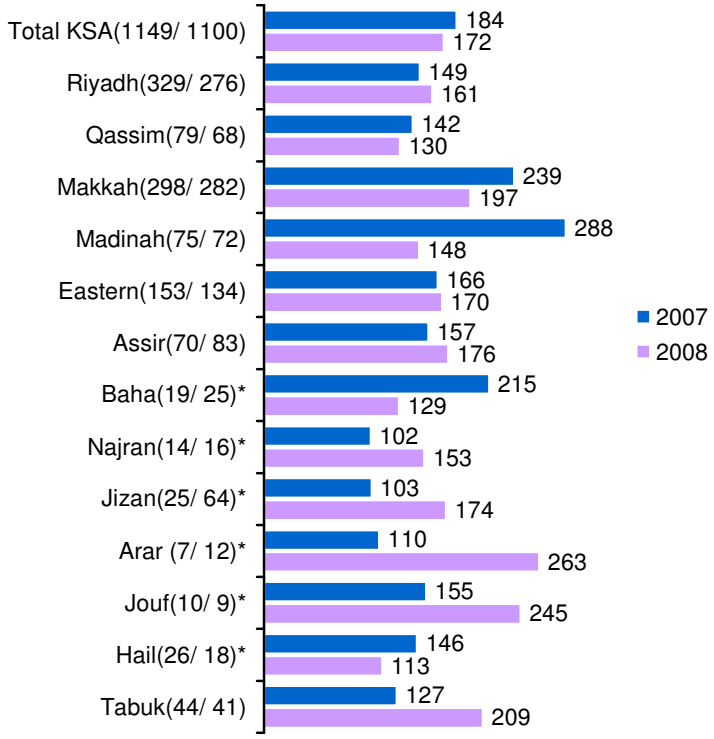
than others. One in four people in Baha use English operating system, While 28% of those in Hali also do. While in 2007 those in Najran, Arar, Jouf and Hail owned Arabic operating systems only, these have now declined by an average of 10%

English is marginally more accepted as the operating system language among males compared to females and among the those aged 45 and younger.

4.9 Average IT expenses in a month

Spending on computer usage has decreased year on year in Saudi Arabia, from 184 Saudi Rials to 172 per month. This varies across location with those in Arar, Jouf and Tabuk spending more in 2008 than 2007, but considerably more than those in other locations.

Exhibit 4.9 Average IT expenses in a month



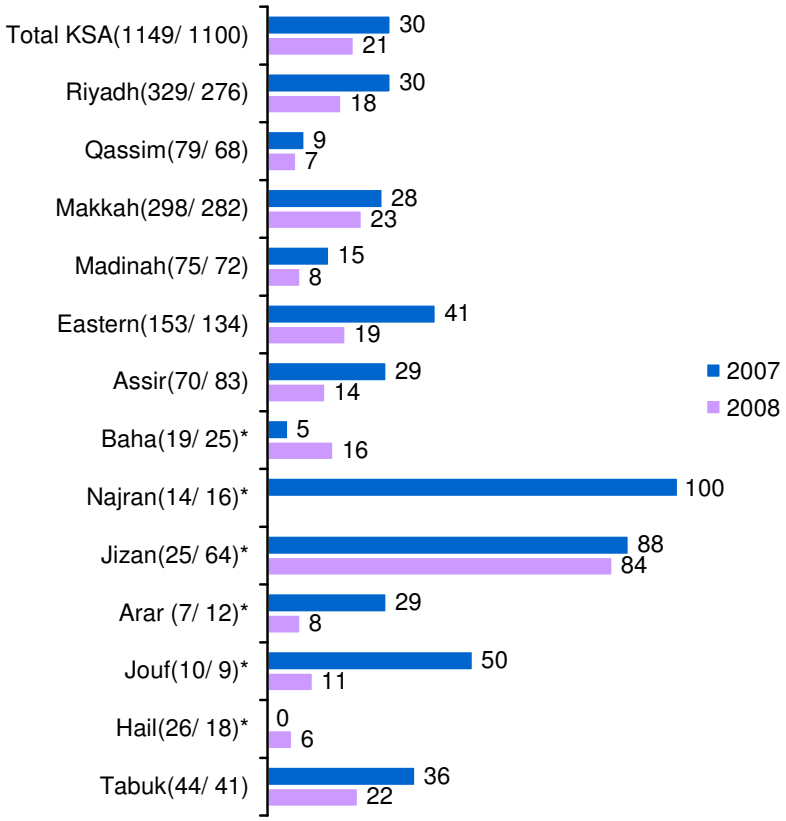
Base : All users of Computer Devices

4.10 IT related training taken

Vast majority of computer users in Saudi are untrained in IT related programs, and decreased year on year from 30% to just 21% in 2008. Incidence of IT training is slightly more among the younger respondents.

Findings indicate that people residing in Jizan and Tabuk are relatively more trained in IT related programs, however, this has also decreased. 40% of those residing in Najran have taken up education in Accounting packages, while 25% of those in Jizan have completed the same. It is also worthwhile to note that only 24% of females are IT trained as against 27% males.

Exhibit 4.9 Proportion that has under gone IT Training



Base : All users of Computer Devices

*Note: * Base too small to analyze*

5.0 Internet Usage Habits

5.1 Internet penetration

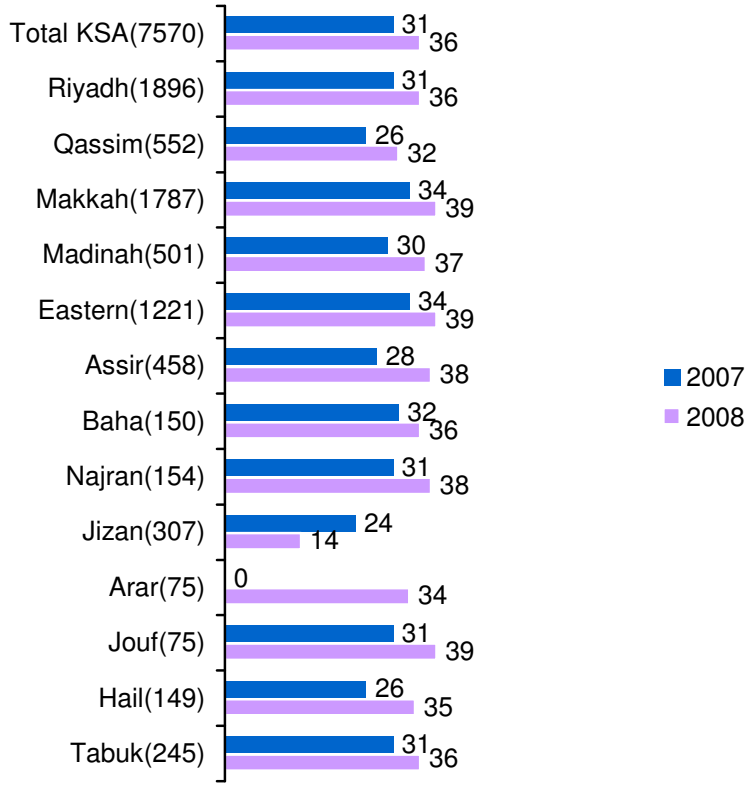
Internet penetration has grown from 2007 to 2008 from 30.5% to 36% for the total population.

	2007	2008
Total population of KSA	23,980,834	25,035,000
Population of 15 to 60 years old	15,107,925 (63% of Total population)	15,772,050 (63% of Total population)
Internet usage among 15 to 60 year olds	7,705,042 (51% of 15 to 60 year olds)	9,605,178 (61% of 15 to 60 year olds)
Internet accessed in the last 2 weeks+	7,319,790 (95% of 15 to 60 year old Internet users)	9,124,920 (95% of 15 to 60 year old Internet users)
Internet users out of the Total population	30.5%	36%

(*source: www.cdsi.gov.sa Population and Housing Characteristics in the Kingdom of Saudi Arabia Demographic Survey 1428H 2007)

Penetration varies across provinces; Internet usage is highest in Makkah (39%), Eastern Province (39%) and Jouf (39%).

Exhibit 5.1a Internet usage by Provinces



Base: All respondents (total population)

**Source: 2007 & 2008 population – year end projected numbers*

Those in higher social class are more likely to have an internet connection at home, 77% of those in social class A/B have an internet connection while only 36% of those in social class D/E.

Male respondents are more likely to use the internet everyday also, 72% compared to just 50% of females. Also, the younger age groups are more likely to use the internet everyday vis-à-vis older age groups.

Exhibit 5.1b Share of Internet by Province

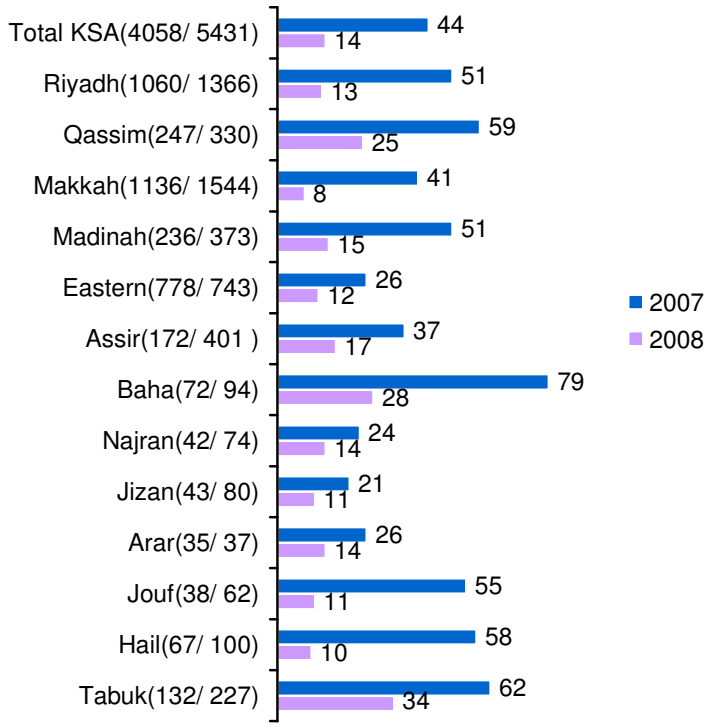
	2008
Total KSA	100%
Riyadh	24.6%
Qassim	3.9%
Makkah	27.5%
Madinah	7.0%
Eastern	15.8%
Assir	7.6%
Baha	1.6%
Najran	2.0%
Jizan	2.0%
Arar	1.1%
Jouf	1.7%
Hail	2.2%
Tabuk	3.0%

5.2 Type of connection

There has been a clear shift from dial up to broadband connection between 2007 and 2008. Three quarters of those aware of what type of internet connection are now using DSL/Broadband connection compared to just 47% the previous year.

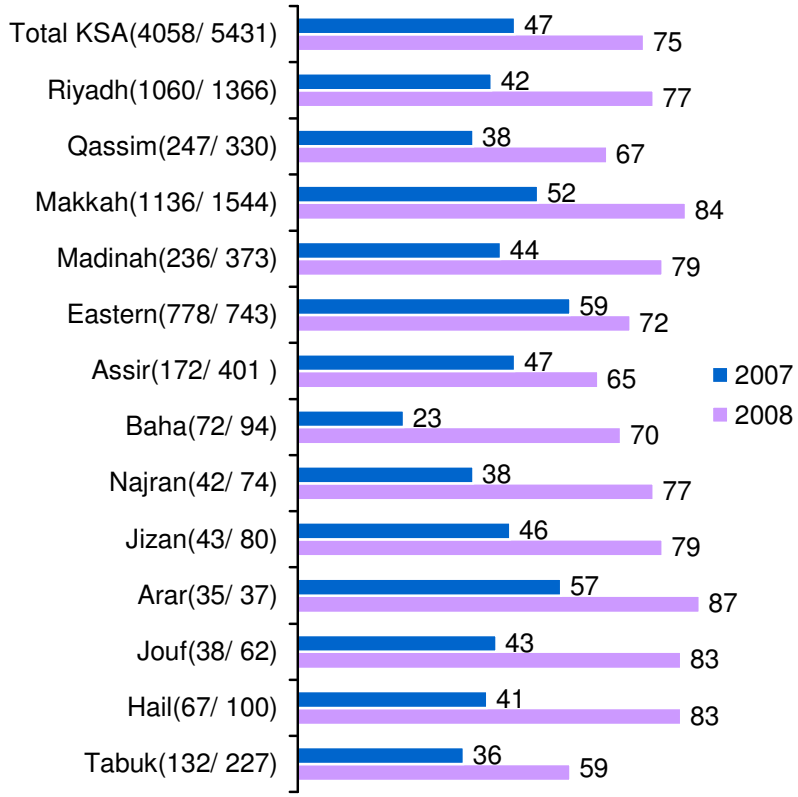
Exhibit 5.2 Type of connection by Provinces

DIAL-UP



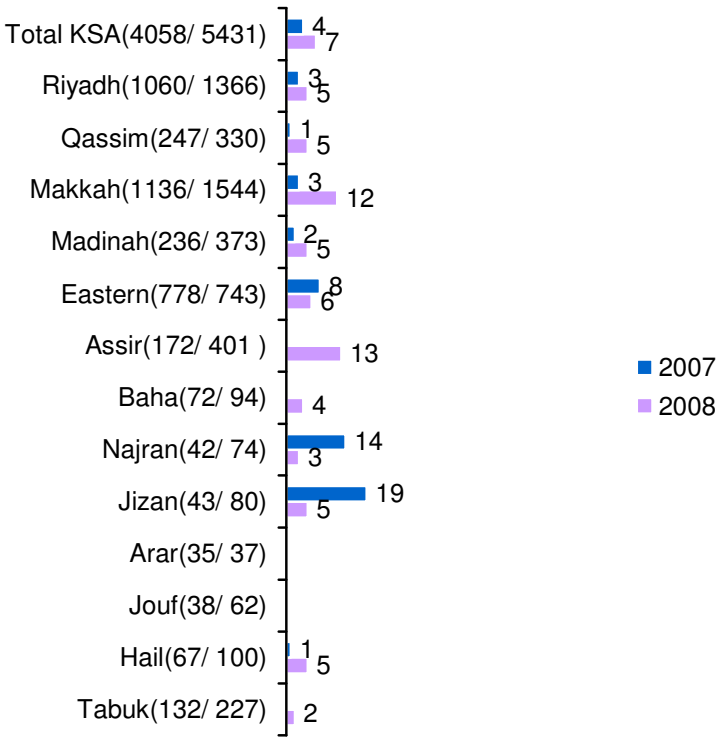
Base : All having internet connection

DSL/ BROADBAND



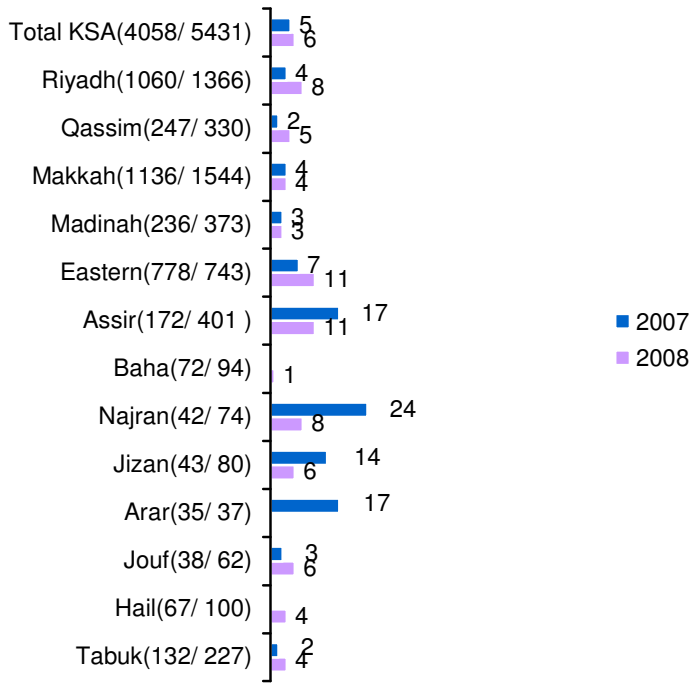
Base : All having internet connection

OTHER TYPES OF INTERNET CONNECTION



Base : All having internet connection

DON'T KNOW



Base : All having internet connection

Dial up has seen the sharpest decline for those residing in Baha, Hail, Jouf, Madinah and Makkah.

Other types of internet connection are insignificant.

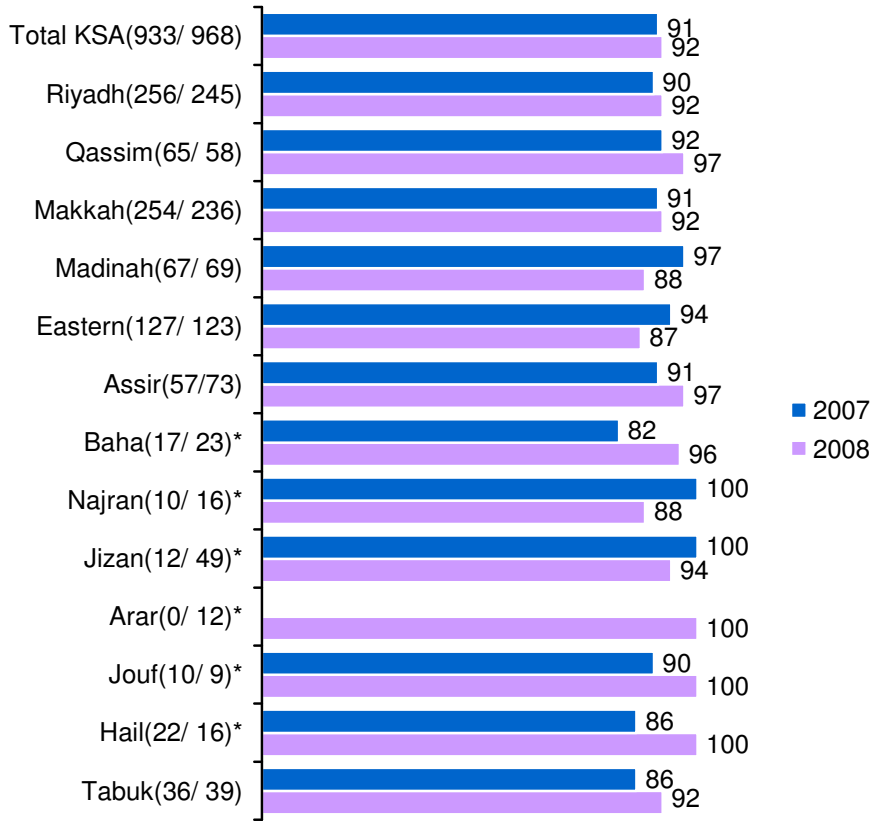
Dial up connection is slightly more popular within the lower social classes.

5.3 Location of usage

The majority of internet usage occurs at home (92%), while using the internet at work is second most popular (29%). Internet cafes is the third most popular location with 16% using this service.

Exhibit 5.3 Location of usage by Provinces

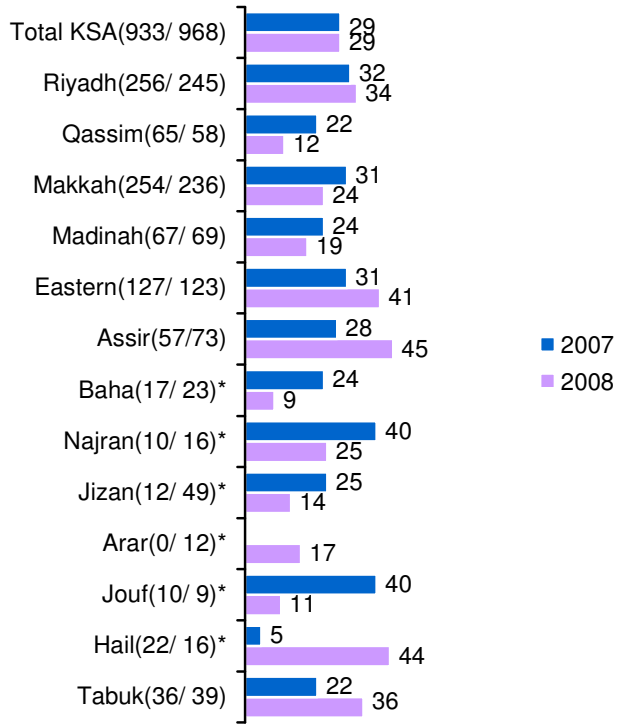
AT HOME



Base : All users of Internet

*Note: * Base too small to analyze*

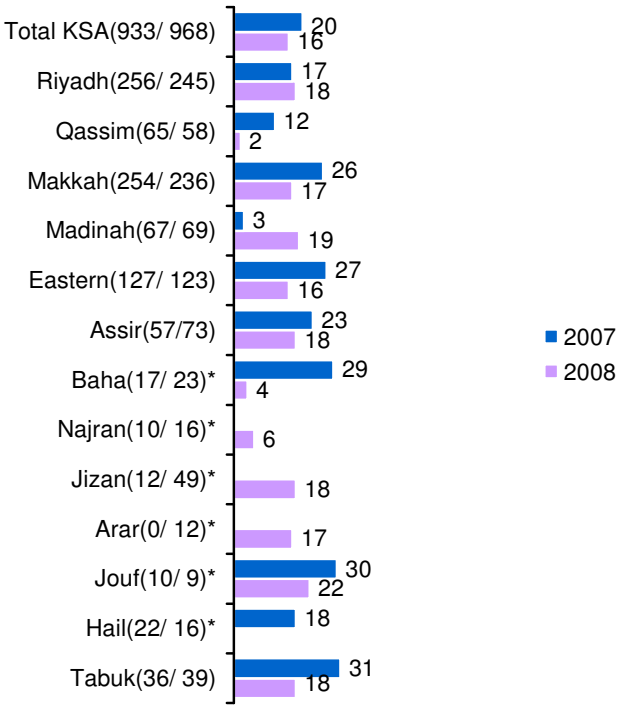
AT WORK



Base : All users of Internet

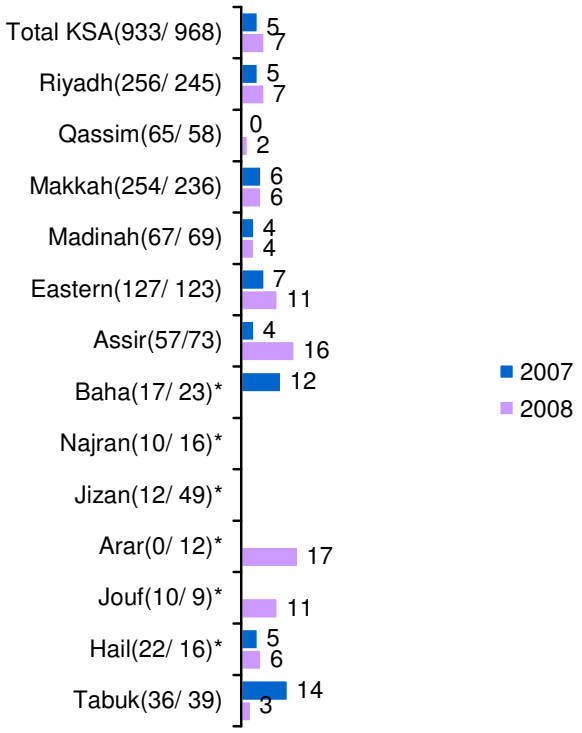
*Note: * Base too small to analyze*

INTERNET CAFÉ



*Base : All users of Internet. Note: * Base too small to analyze*

FRIEND'S/ RELATIVE'S HOME



Base : All users of Internet

*Note: * Base too small to analyze*

100% of internet users residing in Arar use the internet at home, while in Assir using the internet at work is the more popular amongst all locations (38%). Internet cafes are more popular in Jouf, Tabuk and Makkah. Males are more likely to frequent internet cafes compared to females. Younger age groups tend to use internet cafes vis-à-vis older age groups.

Females are more likely to use the internet at home 98% use this source compared to 88% of males, while males use the internet at work, 41% compared to 13% of females.

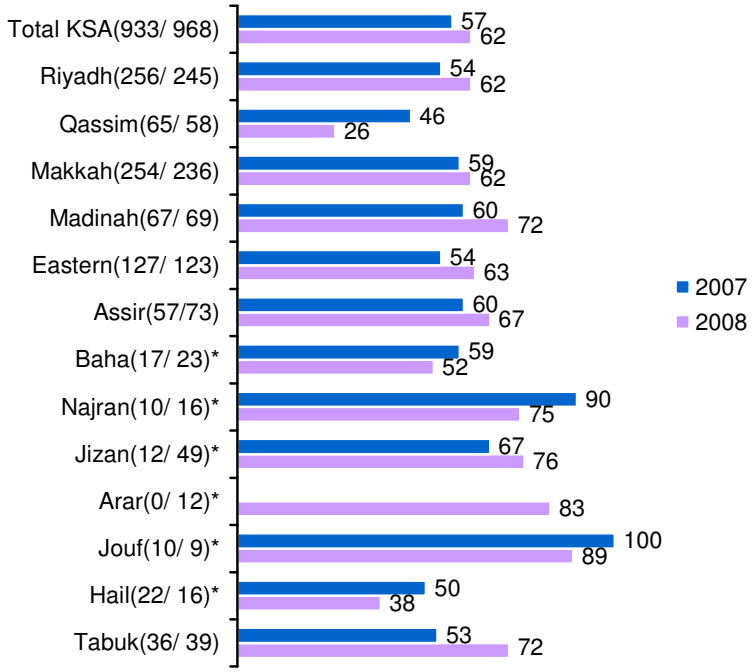
5.4 Usage frequency

The majority of internet users use the internet at least once a week, with 62% using it every day.

Males and those in the younger age groups use the internet more frequently.

Exhibit 5.4 Frequency of usage by Provinces

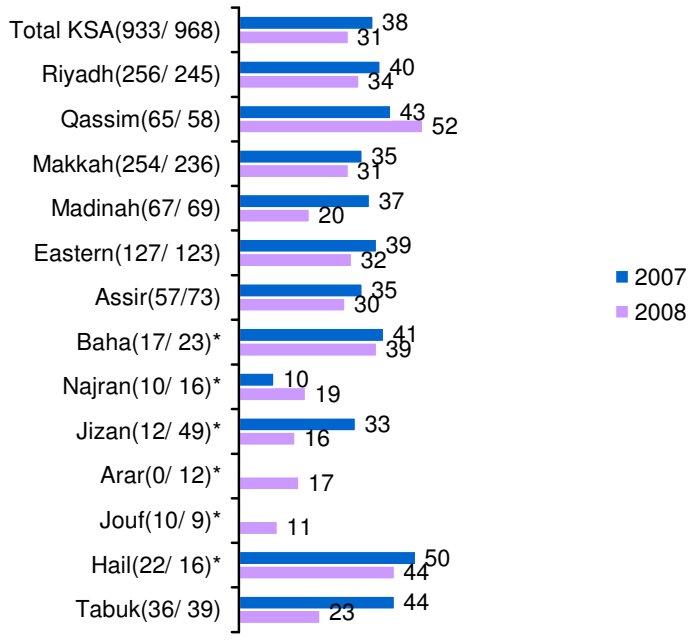
AT LEAST ONCE A DAY



Base : All users of Internet

*Note: * Base too small to analyze*

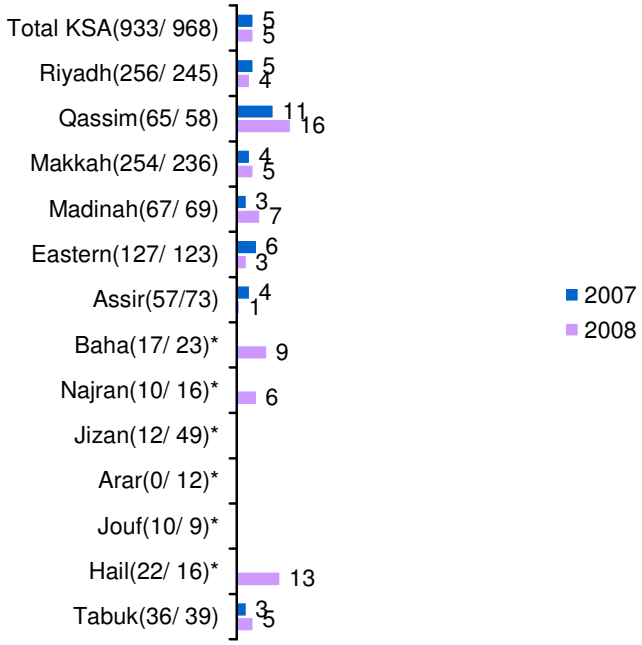
AT LEAST ONCE A WEEK BUT NOT EVERYDAY



Base : All users of Internet

*Note: * Base too small to analyze*

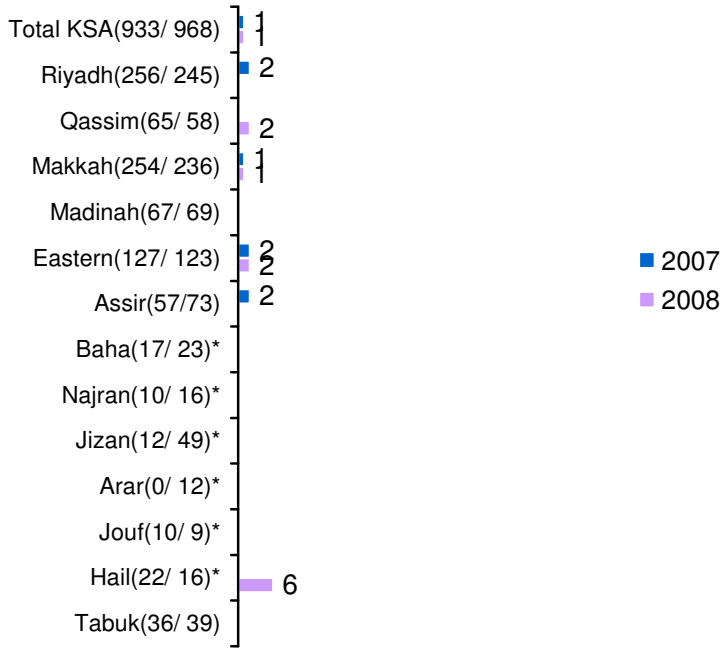
AT LEAST ONCE A MONTH BUT NOT EVERY WEEK



Base : All users of Internet

*Note: * Base too small to analyze*

LESS THAN ONCE A MONTH



Base : All users of Internet

*Note: * Base too small to analyze*

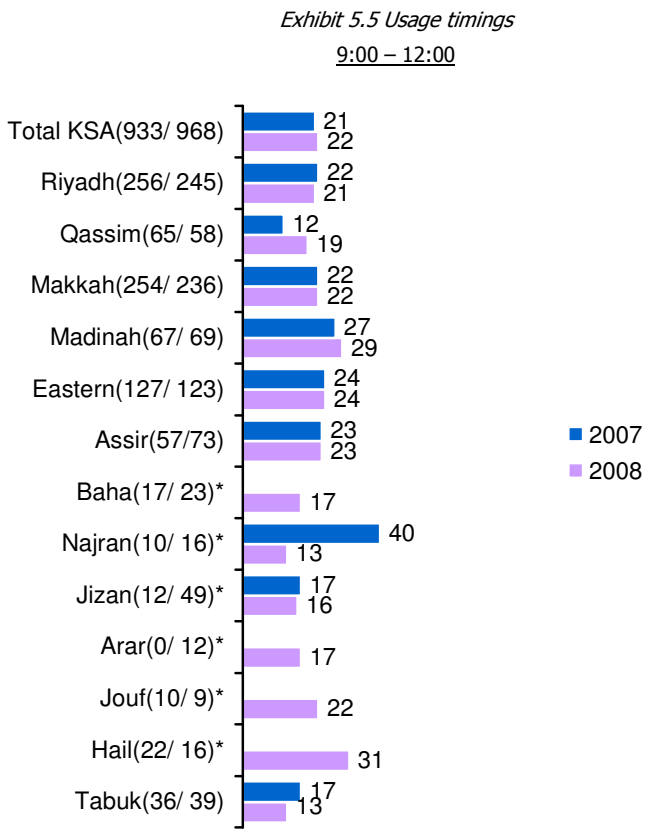
5.5 Usage timings

On an average, internet users in Saudi spend about three hours surfing the net at a time. People mostly use internet in the evening after 4:00 pm up till midnight, 86% doing so (an increase from 84% in 2007).

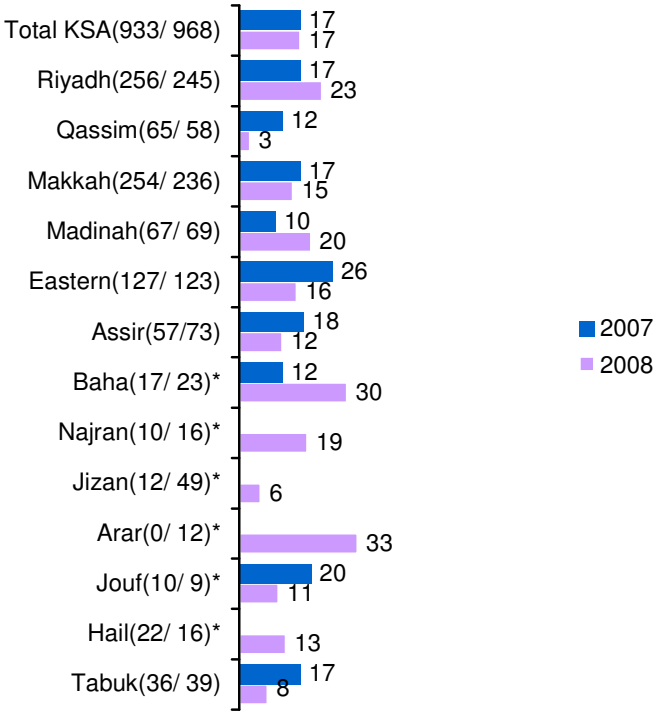
Internet usage time is seen to be directly related to age. Youngsters (15 to 24 years old) are found to be spending more time surfing the net. However, the difference between the lengths of time spent surfing the internet between age groups in 2007 has closed slightly, with 15-24 year olds spending an average of 3.23 hours compared to 35-44 year olds spending an average of 2.63 hours.

In fact, 25% of 15 to 35 year olds spend more than 4 hours on the internet each time they use it. These youngsters usually prefer to surf the net after 8:00 pm. About half of them use internet in the 8:00 pm to midnight slot, while the older users prefer the 4:00 pm to 8:00 pm timing more.

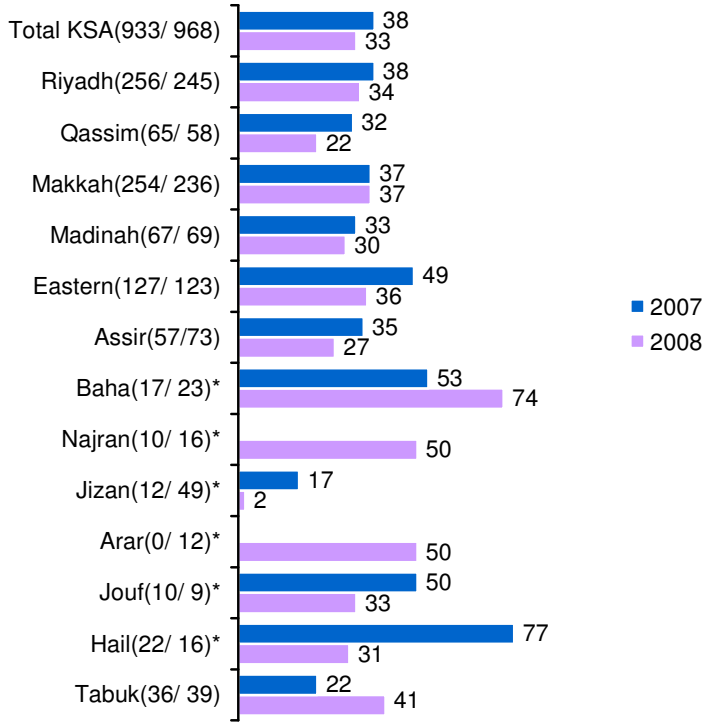
Exhibit 5.5 Usage timings

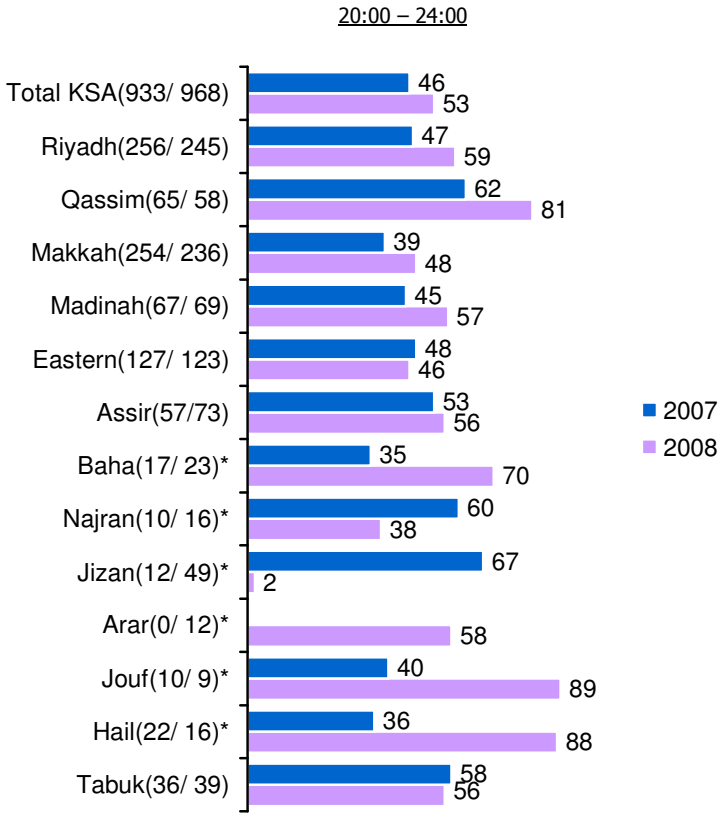


12:00 – 16:00



16:00 – 20:00





5.6 Reasons for using Internet

Browsing and communication, that is, e-mails, chatting, participating in blogs and forums etc. emerge as the two main reasons for using Internet in Saudi, with browsing increasing from 41% in 2007 to almost half of internet users (47%) in 2008. Other uses of the internet are cited at information gathering, education, entertainment and Business, however, very few use the internet as their main purpose.

Browsing the internet is becoming more popular for those residing in Qassim, Madinah, Baha, Arar and Jouf.

While overall using the internet to communicate is declining it is becoming increasingly important for those residing in Riyadh.

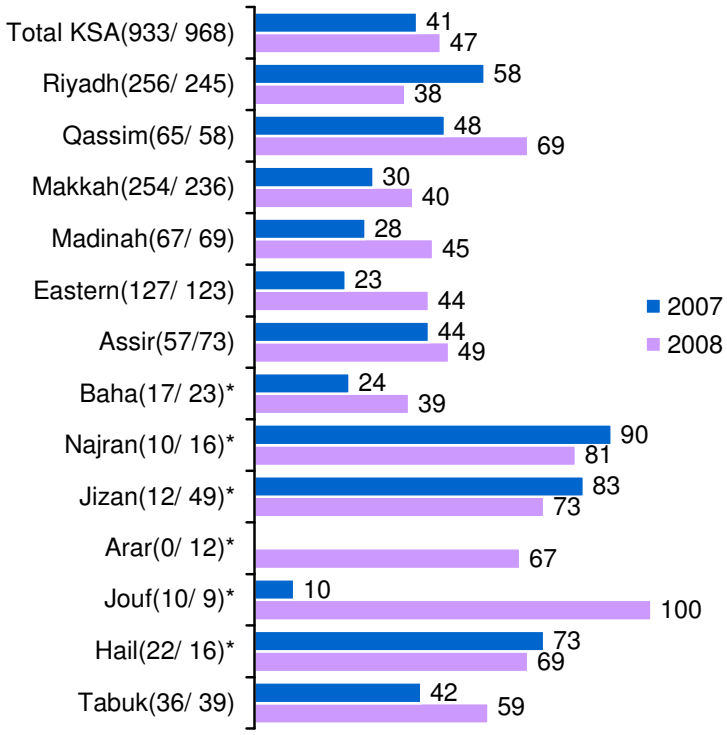
Information seeking is relatively less important for most Saudi's, with little variation across locations.

Exhibit 5.5 Main Reason for using Internet

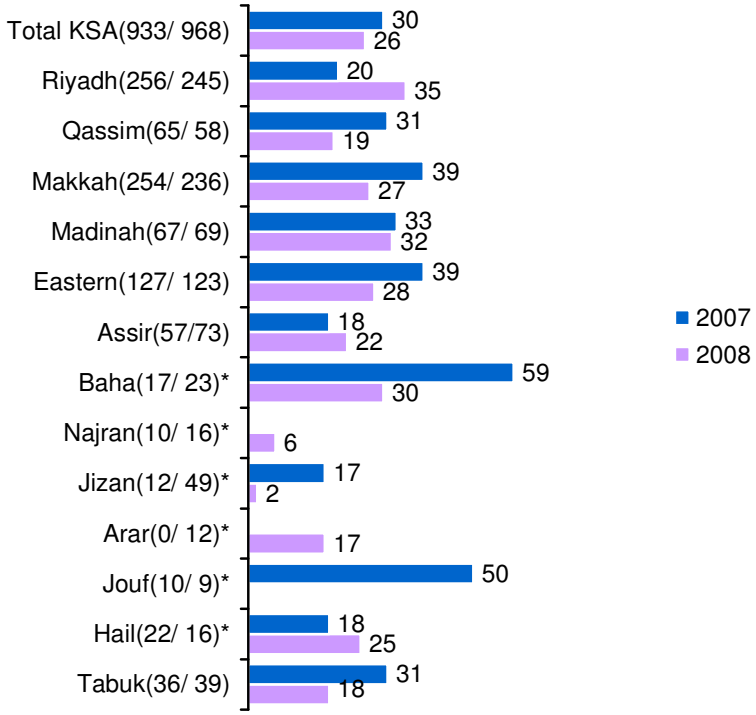
	2007	2008
Base: All Internet users	**933**	**968**
Browsing	41%	47%
Communication	30%	26%
Information	10%	10%
Education	5%	4%
Entertainment	4%	5%
Business	4%	3%
Downloading	3%	2%
Others	3%	3%

Exhibit 5.6 Main Reason for Use by Provinces

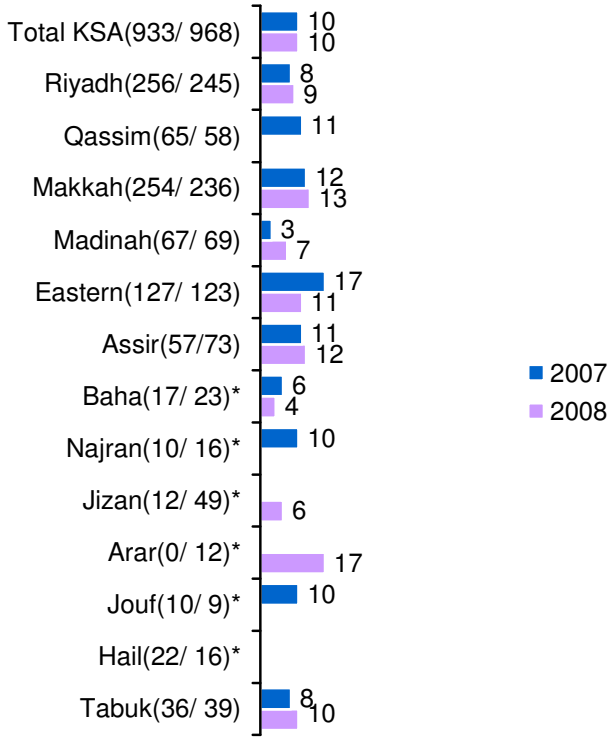
BROWSING



COMMUNICATION



INFORMATION



Reasons for using internet among males as well as females are almost the same. However, females are more likely to look to the internet for information (15%) compared to males (6%).
Males use the internet for communication more so than females, 31% vs. 20%. Younger age groups are more likely to use the internet for communication vis-à-vis older age groups. While, older age groups are more likely use the internet for business purposes.

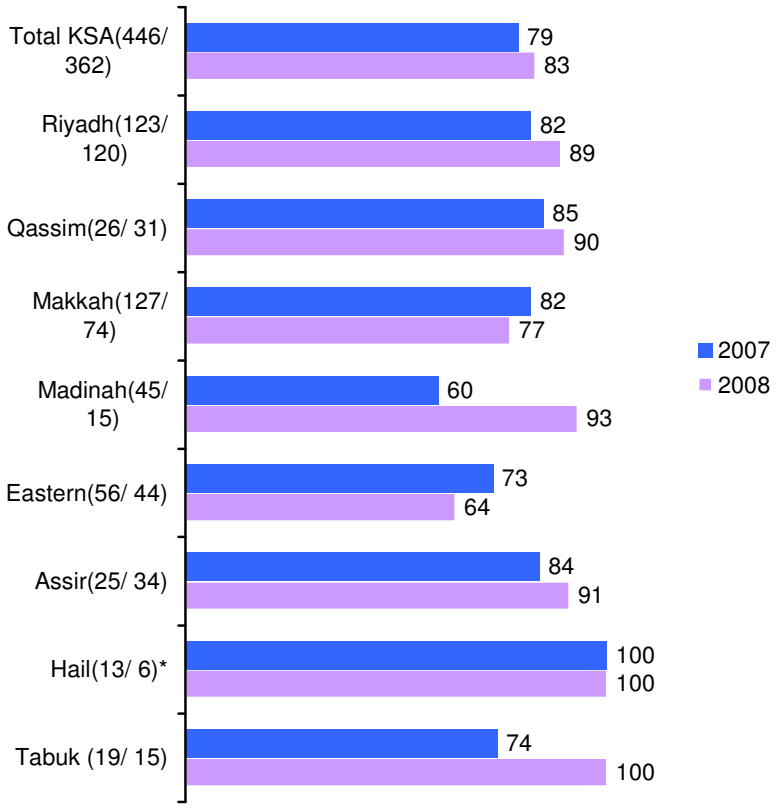
The younger group's key interests, besides browsing, are predominantly chatting, e-mailing and participating in blogs. On the other hand, older people do more of browsing and carry out business related activities and banking, as well as derive information mostly on health services.

5.7 Downloading habits

Downloading from specialist websites is on the increase from 79% of those who claim downloading as one of the key reasons for using internet, to 83% in 2008. it is found that four of every five of these people download from specialized websites, like audio media, movies, games, etc. following this trend peer to peer softwares are decreasing, from 14% to just 7% in 2008.

Exhibit 5.7 Downloading habits amongst those who download

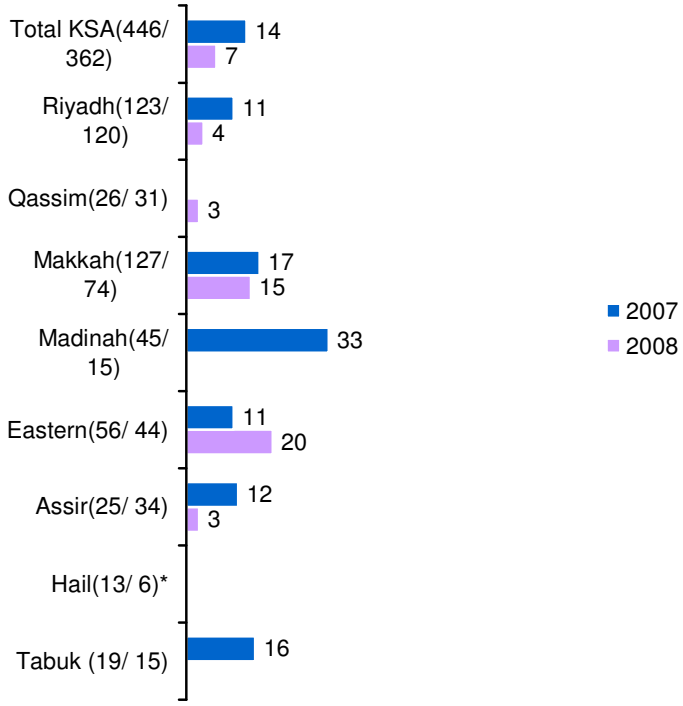
SPECIALIZED WEBSITES (audio, media, movies, games, etc)



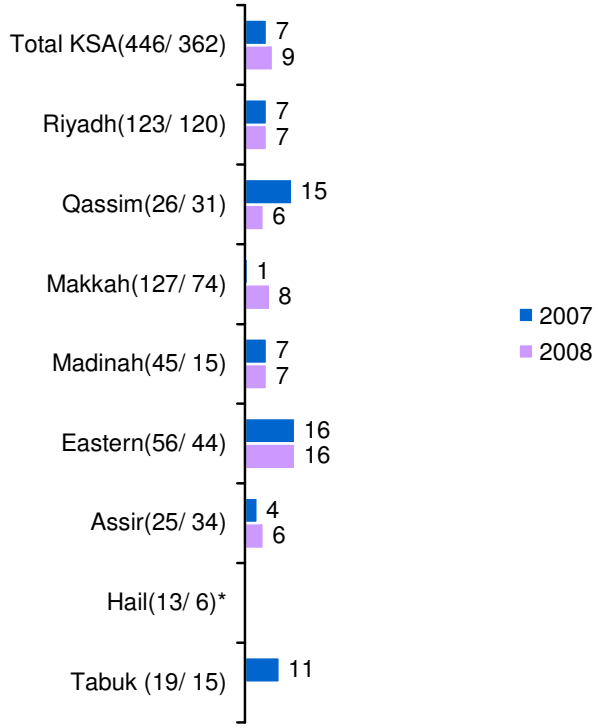
Base : All those who download

*Note: * Base too small to analyze (Baha, Arar, Nazran, Jizan and Jouf has not been included in the above chart due to the small base (less than 5)*

PEER TO PEER SOFTWARE



DID NOT ANSWER



5.8 Popular search engine

Google is still the universal favorite (unchanged at 83% using it most often) there are no variations across male and females across provinces and age-groups. 12% use Yahoo only. Yahoo is slightly more popular among the older group compared to the youngsters.

Google is most popular in Arar, Jouf and Madinah where almost all internet users use Google. While, 38% of the internet users in Najran use Yahoo.

5.9 Popular personal e-mail host

Hotmail is the main e-mail host in Saudi with about 46% using it for their personal e-mail. Other than this, one in ten people in Saudi are also found using Yahoo for their personal e-mails (more so among the older people). Yahoo is more popular as an e-mail host in Makkah, Eastern province and Assir. In Madinah a good two-third majority (64%) uses Hotmail. Very small set of users also use Google mail and MSN (just about 3% and 1% respectively).

Another observation is that that the incidence of having an e-mail id is inversely related to the age of the person with more among the younger age groups having an e-mail id.

5.10 Web browser users

Since 2007, there has been a slight decrease in usage of Internet Explorer, although the clear favorite, with 84% opting for this service. However this has declined from 89% in 2007, with an increase in usage of Netscape from 5% to 9%.

Internet Explorer is most popular in Arar, Jouf, and Hail where all uses take up their services.

Users of Opera have decreased year on year, from 4% to just 1% and has now been banned within the Kingdom.

5.11 Preferred languages for websites

There has been a decline in Saudi's visiting English only websites, from 19% in 2007, to just 11% in 2008. Three quarters of internet users mostly visit sites in Arabic. Those residing in Jouf (100%) and Hail (100%) visit sites in Arabic only.

There is no significant difference in language preference between younger and older people nor with males and females.

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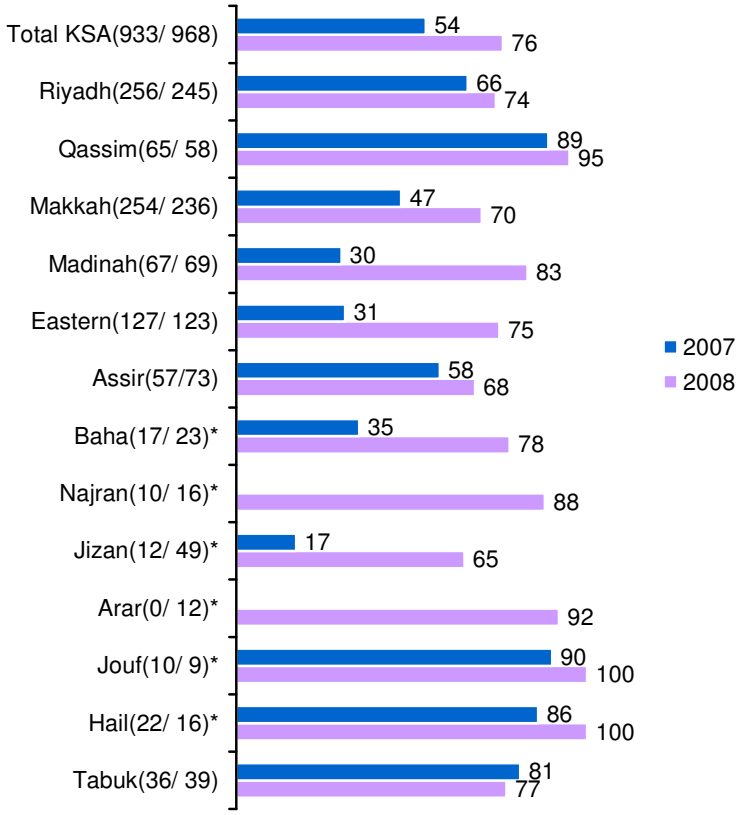
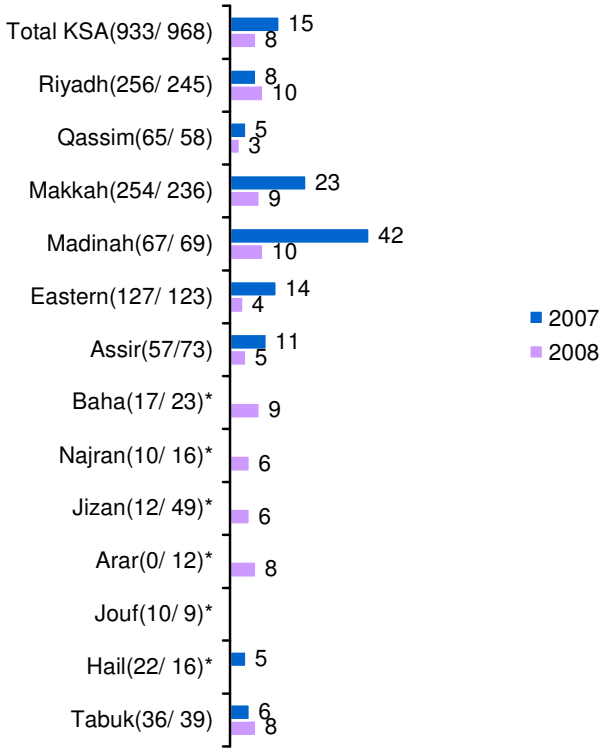
Exhibit 5.7 English vs. Arabic sites visited

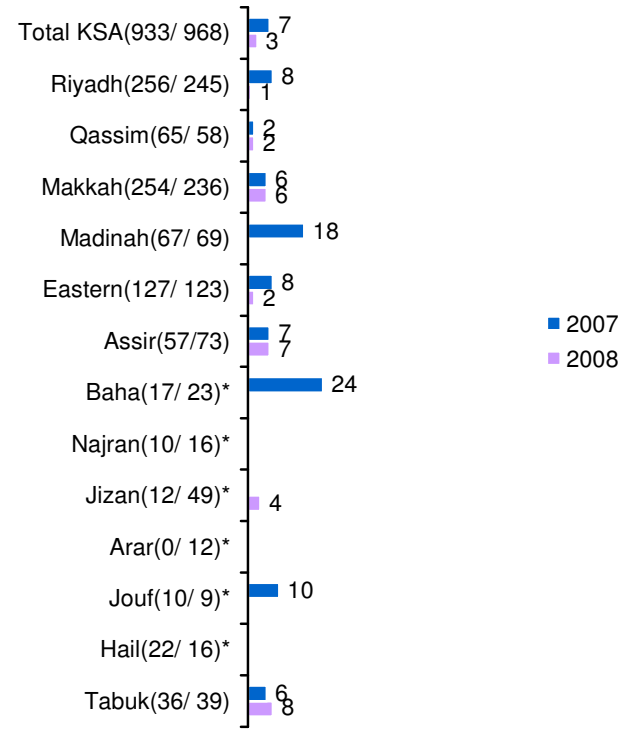
76% to 100% are Arabic



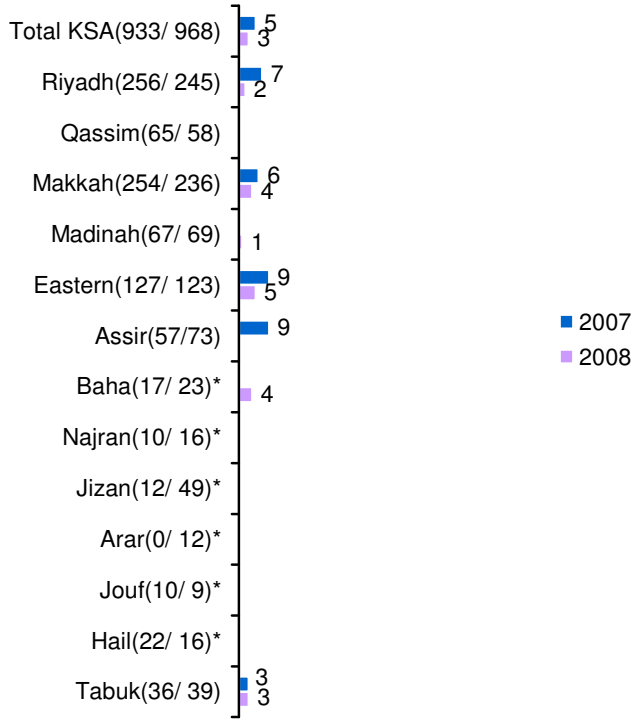
51% to 75% are Arabic



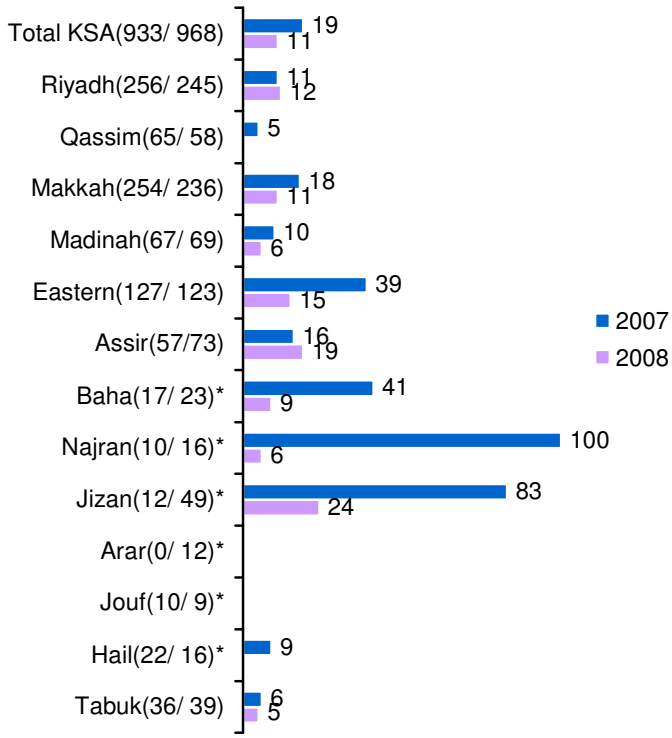
26% to 50% are Arabic



10% to 25% are Arabic



All are English website



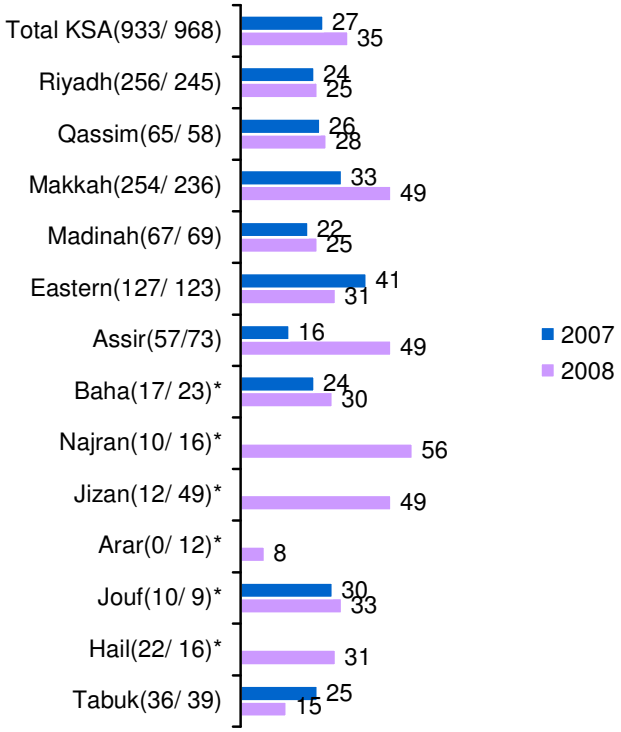
6.0 Internet Satisfaction and Concerns

6.1 Satisfaction

While there has been a migration to broadband, Saudi's are becoming increasingly more satisfied with the internet service they receive. Those in residing in Assin are increasingly extremely satisfied year on year. Very few are dissatisfied with the service they receive, with overall percentage decreasing year on year.

Exhibit 6.1 Satisfaction with Internet Service

EXTREMELY SATISFIED



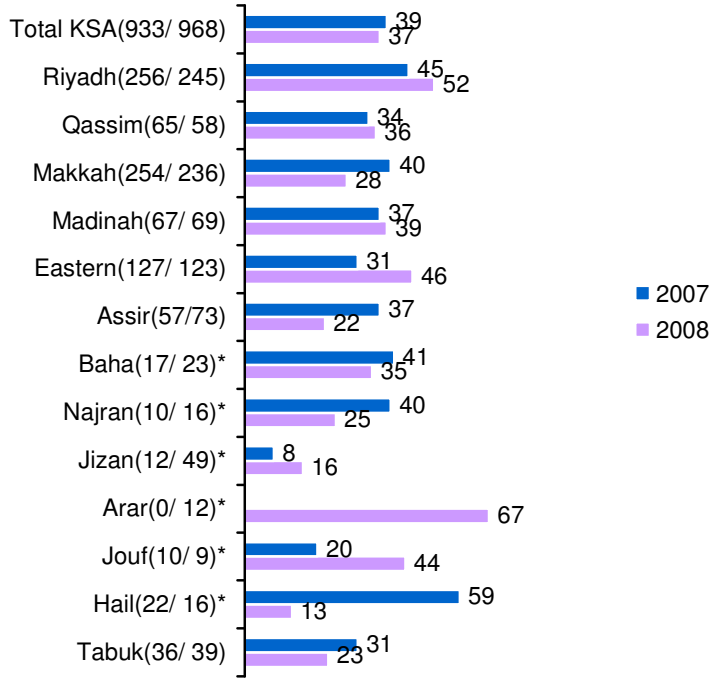
Base : All users of Internet

*Note: * Base too small to analyze*

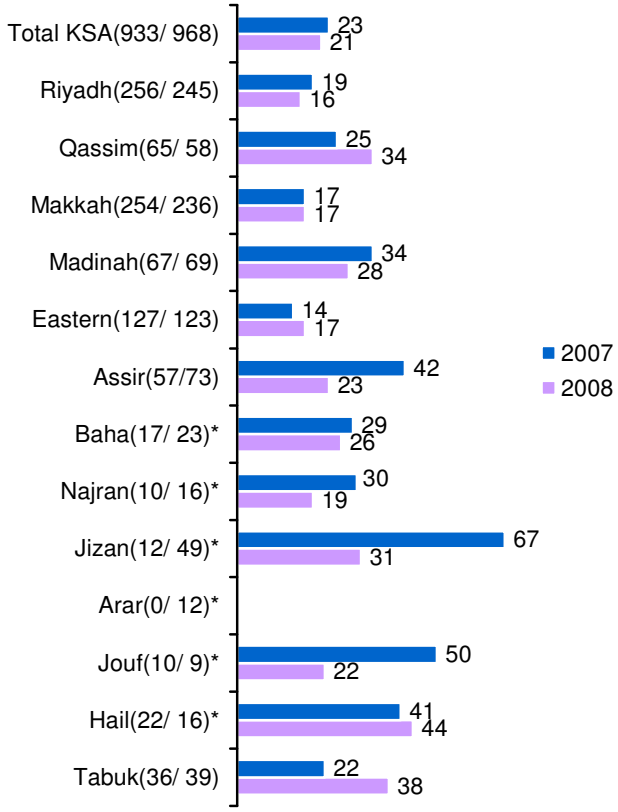
**The norm for top 2 box score (extremely satisfied + somewhat satisfied) in Saudi Arabia is 70% as the acquiescence bias in the kingdom is high due to gratitude factor (cultural reasons).*

Source: Nielsen Studies conducted in KSA.

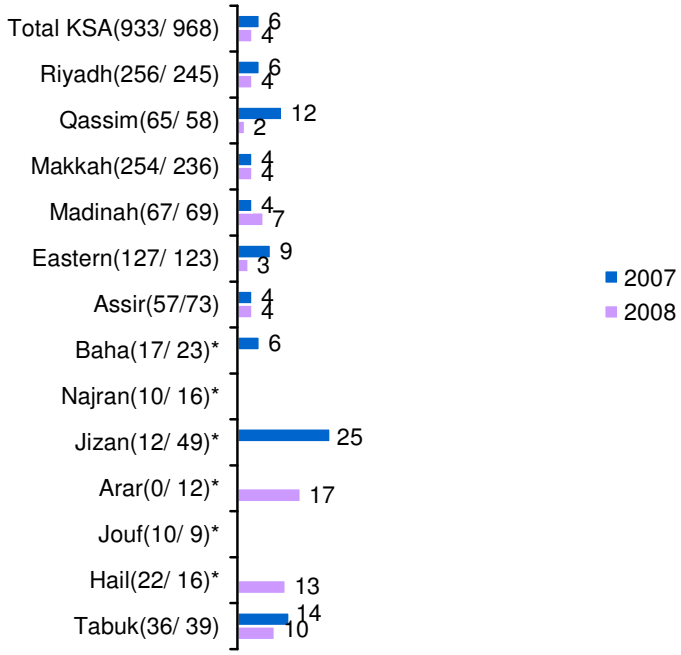
SATISFIED



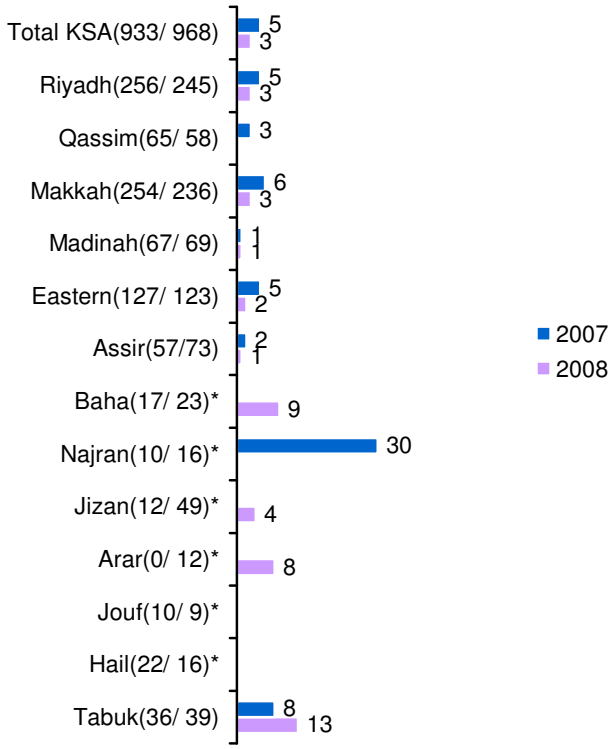
NEITHER NOR



DISSATISFIED



EXTREMELY DISSATISFIED



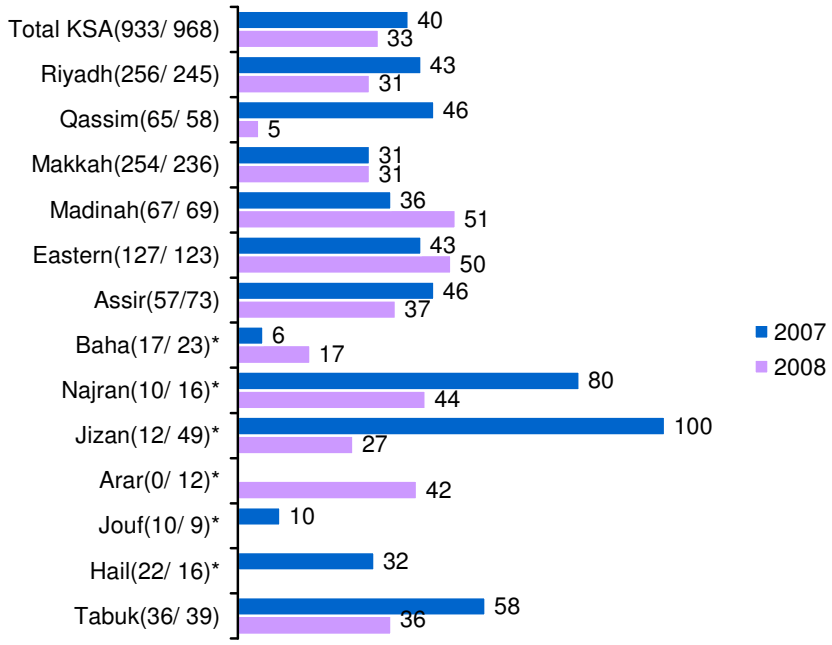
The most satisfied users of internet connection in Saudi are those using DSL/Broadband – 128KB/sec connection vis-à-vis dial up users.

Speed of the connection is the biggest factor driving satisfaction levels of respondents across users of all types of connections.

6.2 Concerns on filtering

The concern of information filtering is declining, while a third still sees this as a concern, it has declined from 40%. Males are more likely to be concerned with filtering than women.

Exhibit 6.2 Proportion finding filtering a concern



Base : All users of Internet

*Note: * Base too small to analyze*

Younger age groups are more concerned with filtering of websites than older age groups.

The main reason for this concern is that some sites are prohibited 31%.

Almost three quarters of internet users feel the current filtering is more than required.

Exhibit 6.3 Extent of filtering a concern

	2007
Base: All Internet users	**372**
A major concern	24%
Somewhat of a concern	22%
Of very little concern	54%

Base : All internet users who found filtering an area of concern (372)

	2008
Base: All Internet users	**316**
Extent of filtering is more than required	73%
Extent of filtering is less than required	27%

Base : All internet users who found filtering an area of concern (316)

6.3 Experience of SPAM mails

Spam emails are becoming more of a problem for Saudi's with an increase from 32% in 2007 to 42% receiving them in 2008. Spam emails are more of an issue for the younger age groups vis-a-vis older age groups.

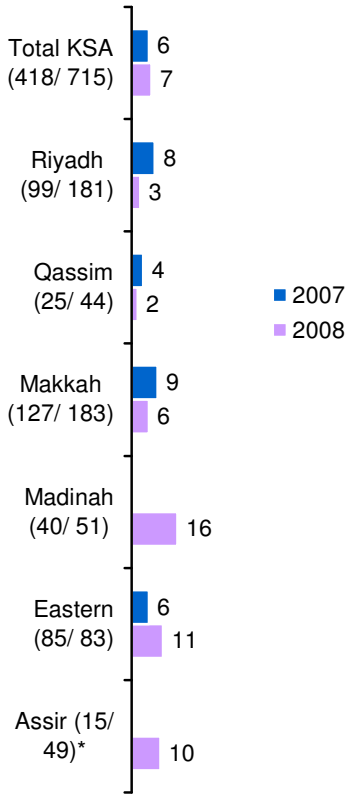
Men (46%) face more of this problem more than women (37%), although the gap is decreasing year on year.

6.4 Perception of internet cost

Perceptions of internet costs are stagnant year on year, with the majority of internet users claiming it to be neither expensive nor affordable, this is also apparent across all locations.

Exhibit 6.4 Perception of internet cost

EXTREMELY EXPENSIVE

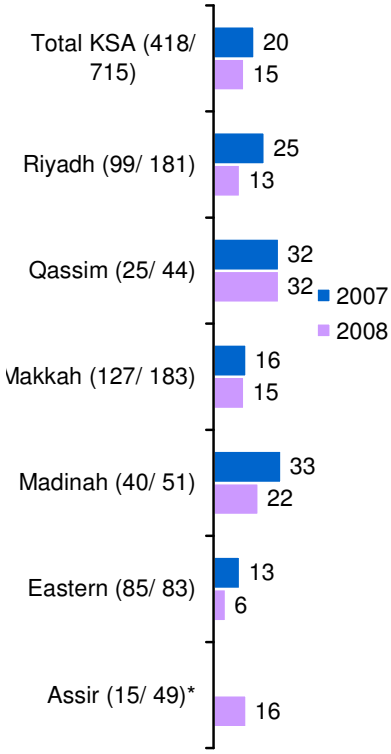


Base : All users of Internet who have DSL/ Broadband

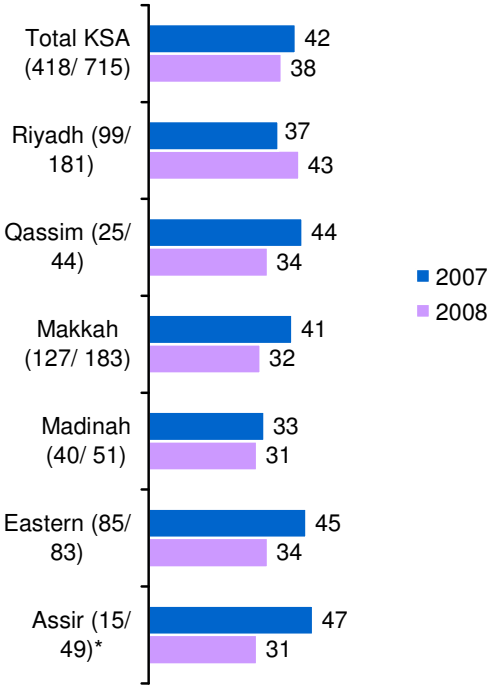
*Note: * Base too small to analyze*

Baha, Arar, Nazran, Jizan, Jouf, Hail and Tabuk has not been included in the above chart due to the small base (less than 10)

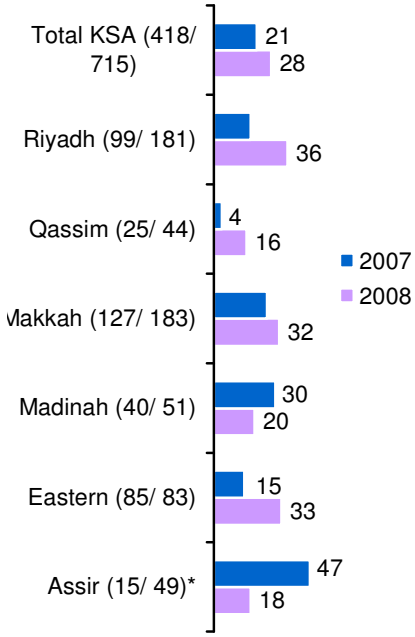
EXPENSIVE



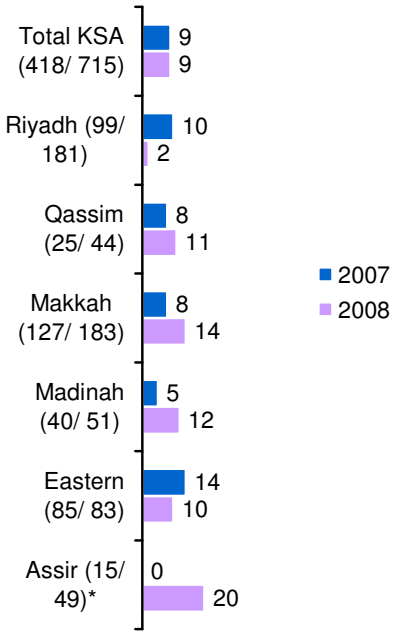
NEITHER NOR



AFFORDABLE



EXTREMELY AFFORDABLE

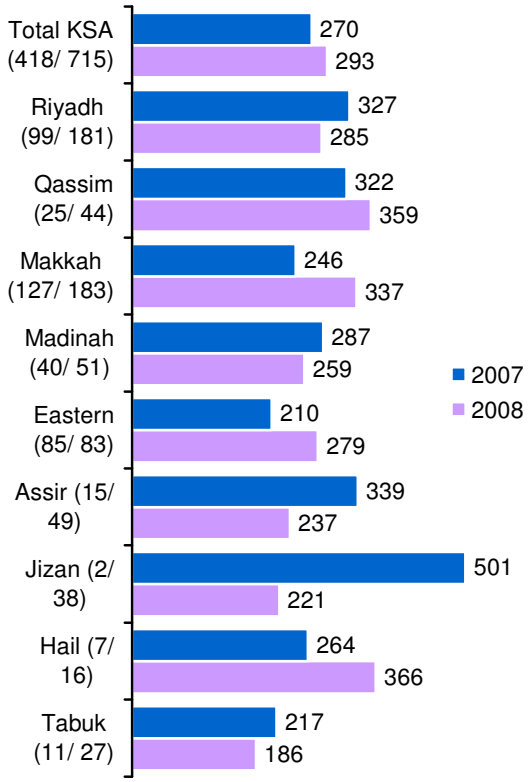


6.5 Average connection expense in a month

On an average, Saudi's are spending more on DSL/Broadband connections each month, a rise from 270 SR to 293 SR.

Spends are similar across age groups but there are differences across provinces. Spends are highest in Baha (SR 425) and Qassim (SR 346) while they are lower in Tabuk (SR 194) and Arar (SR 217)

Exhibit 6.5 Average monthly spend on Internet



Base : All users of Internet that have DSL/ Broadband

*Note: * Base too small to analyze*

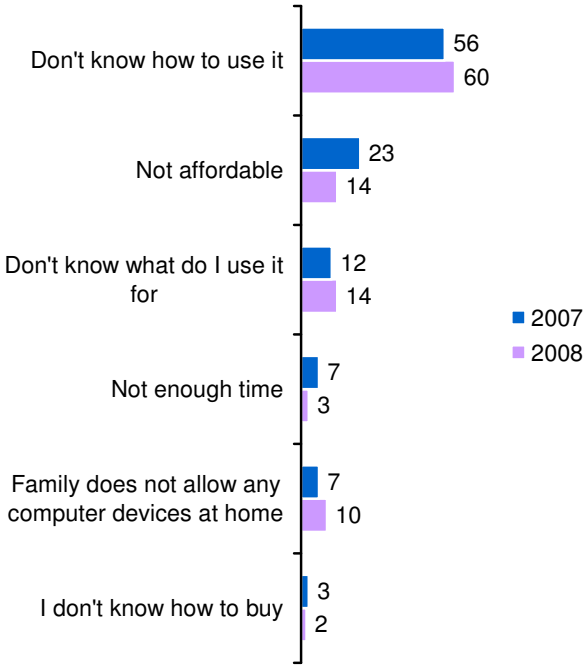
Baha, Arar, Nazran and Jouf has not been included in the above chart due to the small base (less than 15)

7.0 Non-users Section

7.1 Reasons for not using computer / internet

Those from the higher social classes are more likely to have an internet connection at home. "I don't know how to use it" is the reason given by a good majority of people for not using either a computing device or Internet and this is actually on the increase year on year, from 56% to 60% in 2008. This barrier to usage is more so among the older people.

Exhibit 7.1 Reasons for not using computers

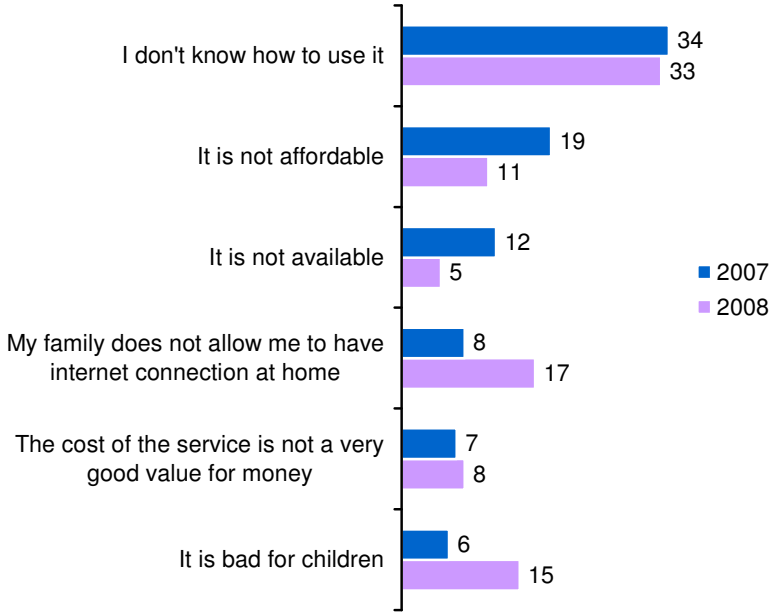


Base : All non-users of Computers (394/ 445)

Affordability is becoming less of an issue for the non-use of computers and the internet. Just 14% feel affordability is a barrier to computer use compared to 23% in 2007. While 11% compared to 19% in 2007 feel affordability is a barrier to using the internet.

Families allowing computer access at home has become more acceptable, with less respondents citing this as a reason for non-use, however, this is more prevalent in younger age groups.

Exhibit 7.2 Reasons for not using internet



Base : All non-users of Internet (216/ 131)

7.2 Intend to buy in next 12 months

Among non-users of computers almost a third are planning to buy a computer device and connect to the internet in the next 12 months. The main reason for buying a computer is to use for education purposes and as they are seen as a necessity. While the main reason for getting an internet connection is to learn from the internet and to keep abreast of the news.

8.0 e-Commerce and e-Learning

8.1 Awareness of e-commerce

Almost half of the respondents (46%) claim that they have heard of e-commerce. There is little variation across age, gender or location.

However, among these claimants, the understanding of the term is found to be quite varied with regards to mode of payment. 34% feel that e-commerce means 'display of items for sale on website that can be ordered and cash paid on delivery', while 23% know that the items displayed on e-commerce site can be bought online using a regular credit card. 25% even mention that in e-commerce, items are displayed for sale on website, which can be bought by personally visiting the shop. Another 13% think that the items can be seen online and an internet credit card has to be used for that.

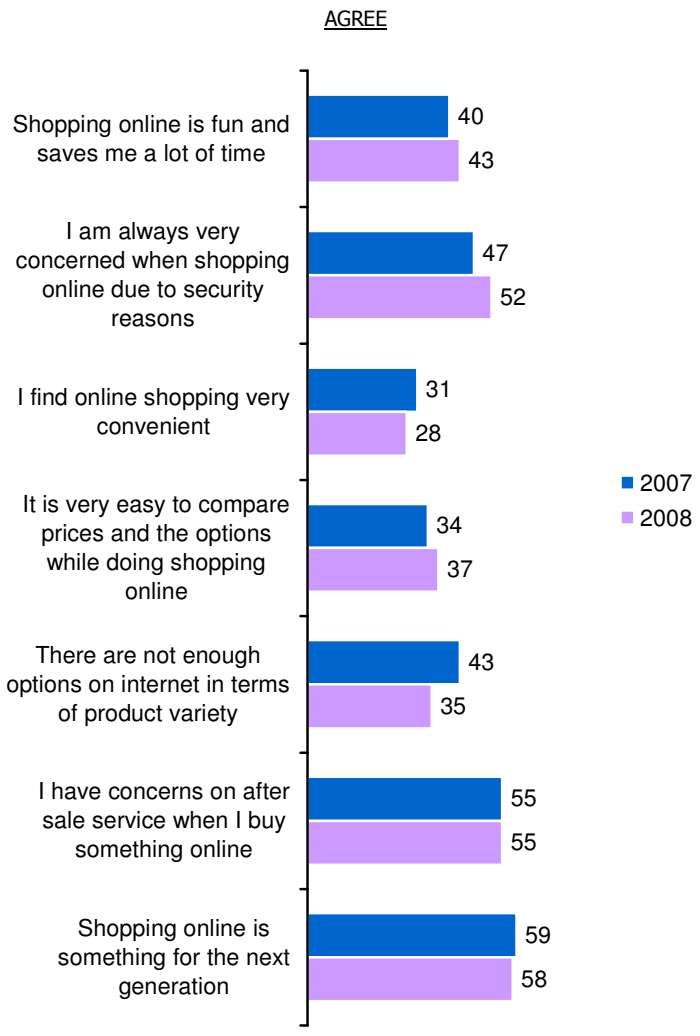
The proportion of people across the board claiming that they are aware of e-commerce concept increased to just 52% when they were prompted with the definition of e-commerce, that is, 'E-commerce is a concept which helps you buying and selling of goods and services on the internet.

8.2 Usage of e-commerce

79% respondents have never ever visited an e-commerce site, a slight decrease from 83% in 2007. Even the 17% people who do visit e-commerce site, do not do so more than 3 out of the 10 times that they log on to internet. The behavior with regards to e-commerce usage in Saudi is uniform with respect to provinces, gender and age.

Only 5% people have ever bought or sold anything on the internet - mainly, airlines tickets, perfume, and consumer electronics.

Exhibit 8.1 Opinion about e-Commerce



Base : All respondents (1543/ 1546)

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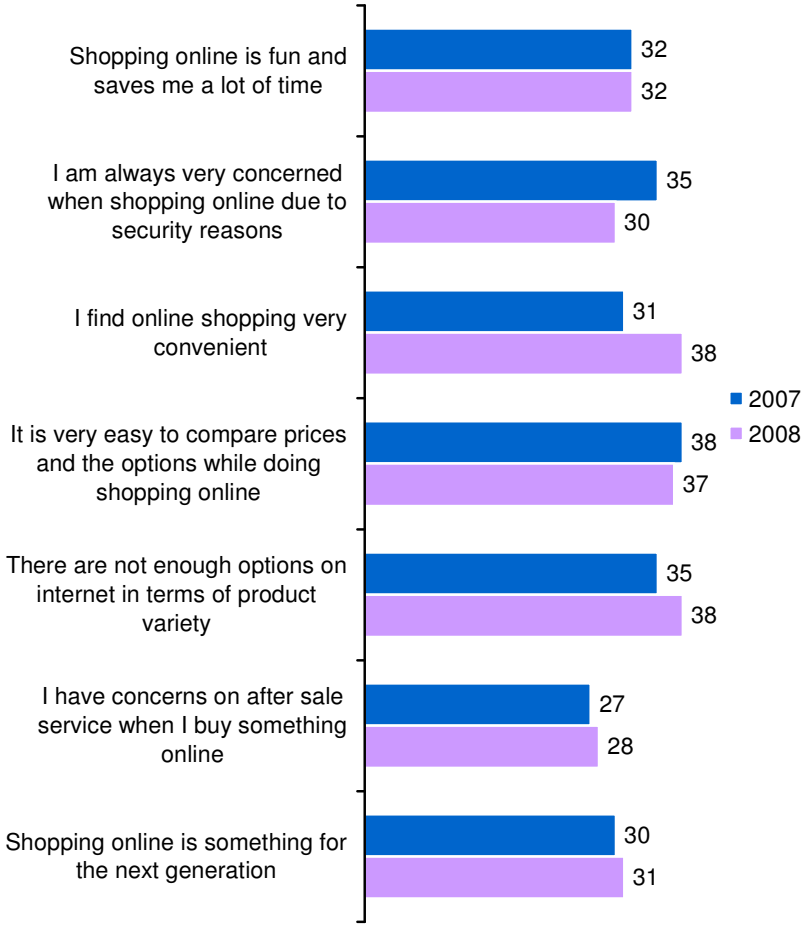
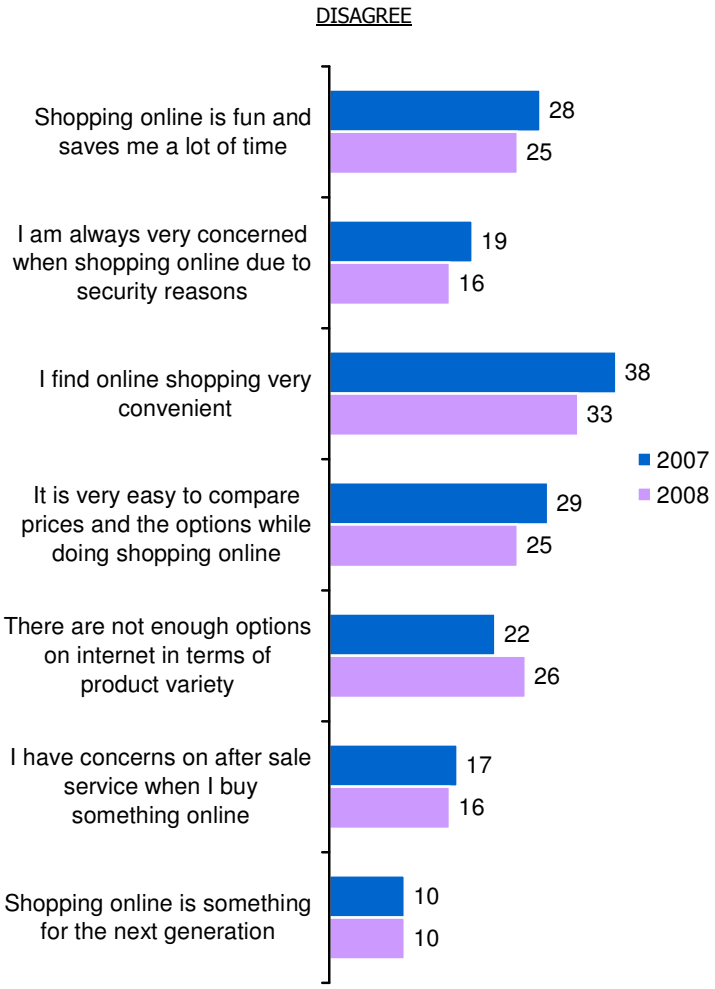


Base : All respondents (1543/ 1546)



Base : All respondents (1543/ 1546)

This not so favorable behavior towards the use of e-commerce in Saudi is either because people they don't consider it safe to buy through internet (52%) or they don't need to buy through internet since everything they need is available otherwise (35%). 36% of the people also overtly express dislike towards the idea of buying through internet.

8.3 Awareness & usage of e-learning

Unlike e-commerce, 48% of the respondents surveyed are aware of e-learning and are fairly confident about its concept. However, only 4% have availed this service. There is low awareness of e-learning in Najran, just 29% while higher awareness in Arir 71%. The younger age groups are more likely to be aware of e-learning vis-à-vis older age groups.

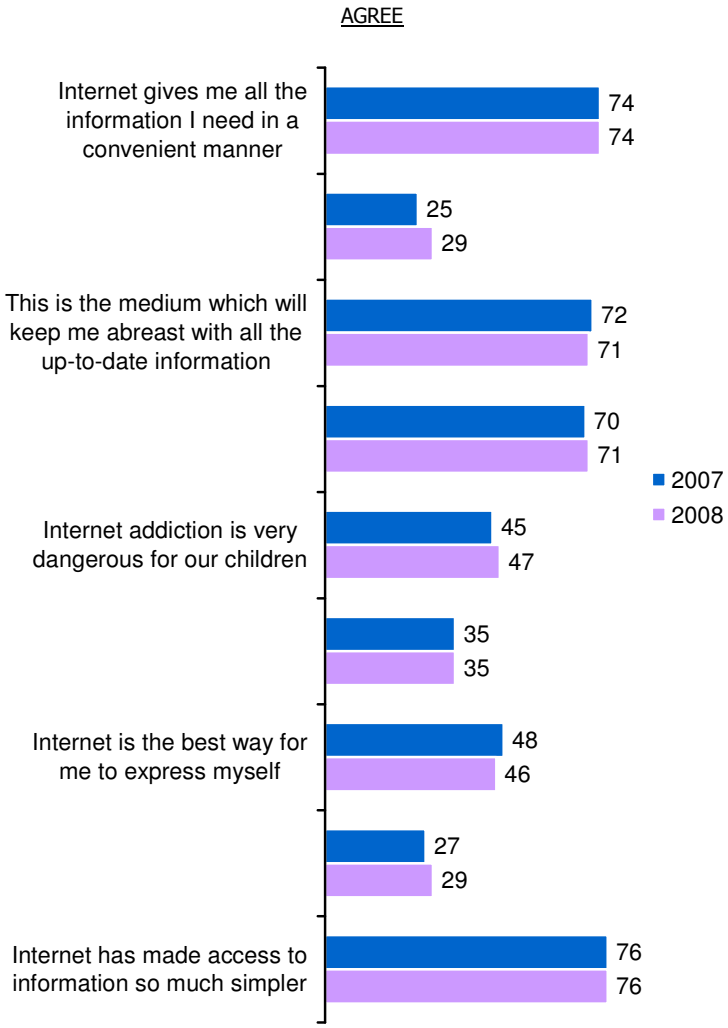
E-learning is a very well accepted concept by most people across Saudi Arabia. 74% feel the internet gives them all the information they need in a convenient manner, 71% feel this medium will keep them

abreast with all up to date information, 71% believe it is critical to have access to the internet as this is the medium of today's generation, 48% believe the internet is the best way to express oneself, 76% believe the internet.

However, a third believe the internet is not good as it has a lot of immoral content, almost half believe the internet is an addiction and is very dangerous for our children, over a third believe the internet makes people less sociable, a third believe the internet embeds wrong ideas and concepts into the mind of the new generation and almost a half of respondents believe the internet to be dangerous for young children.

These concerns about internet are more among the older people.

Exhibit 8.2 Opinion about e-learning



Base : All respondents (1543/ 1546)

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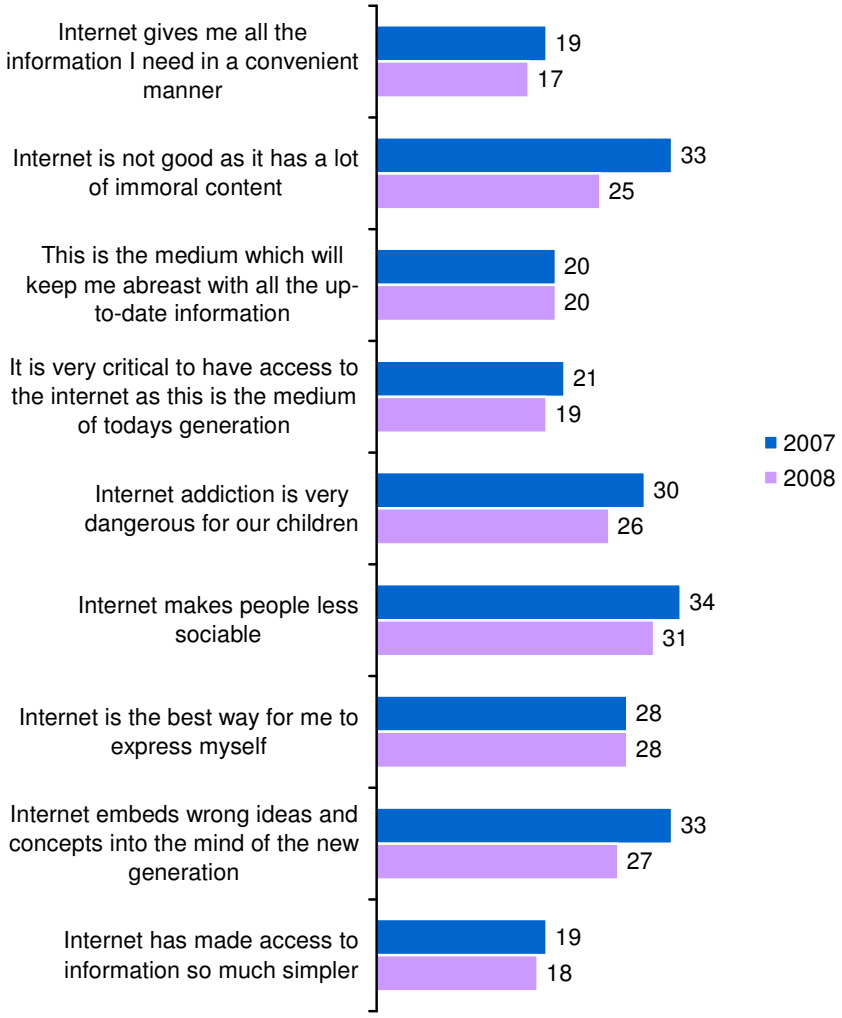
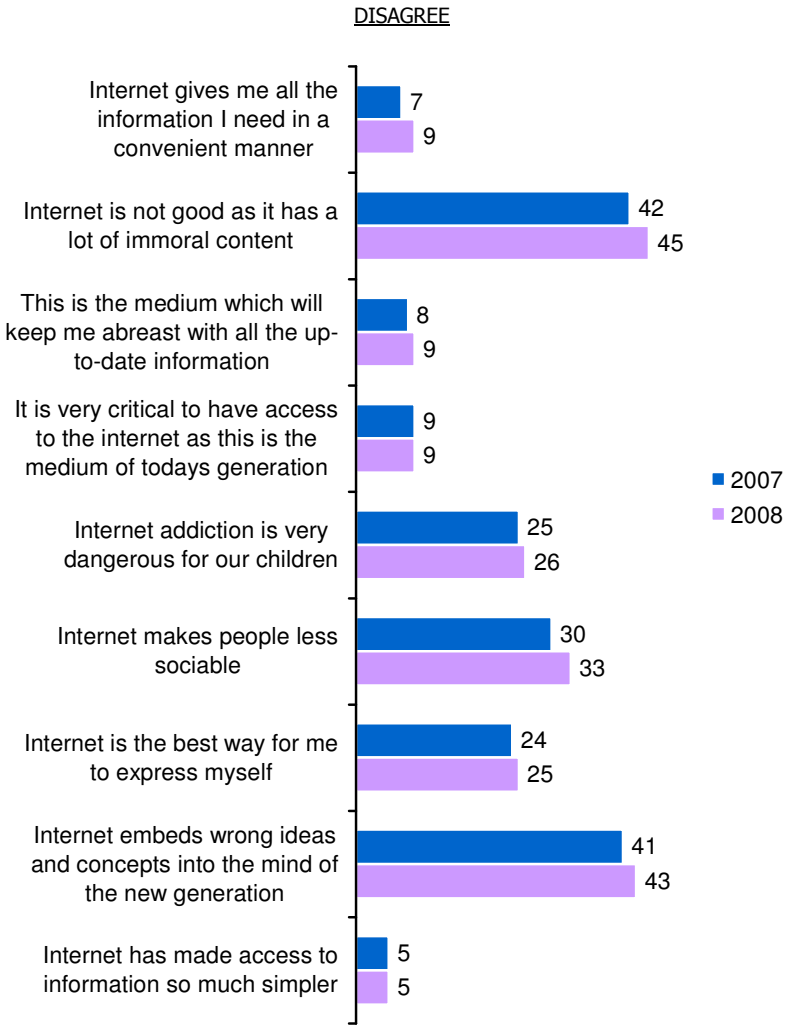
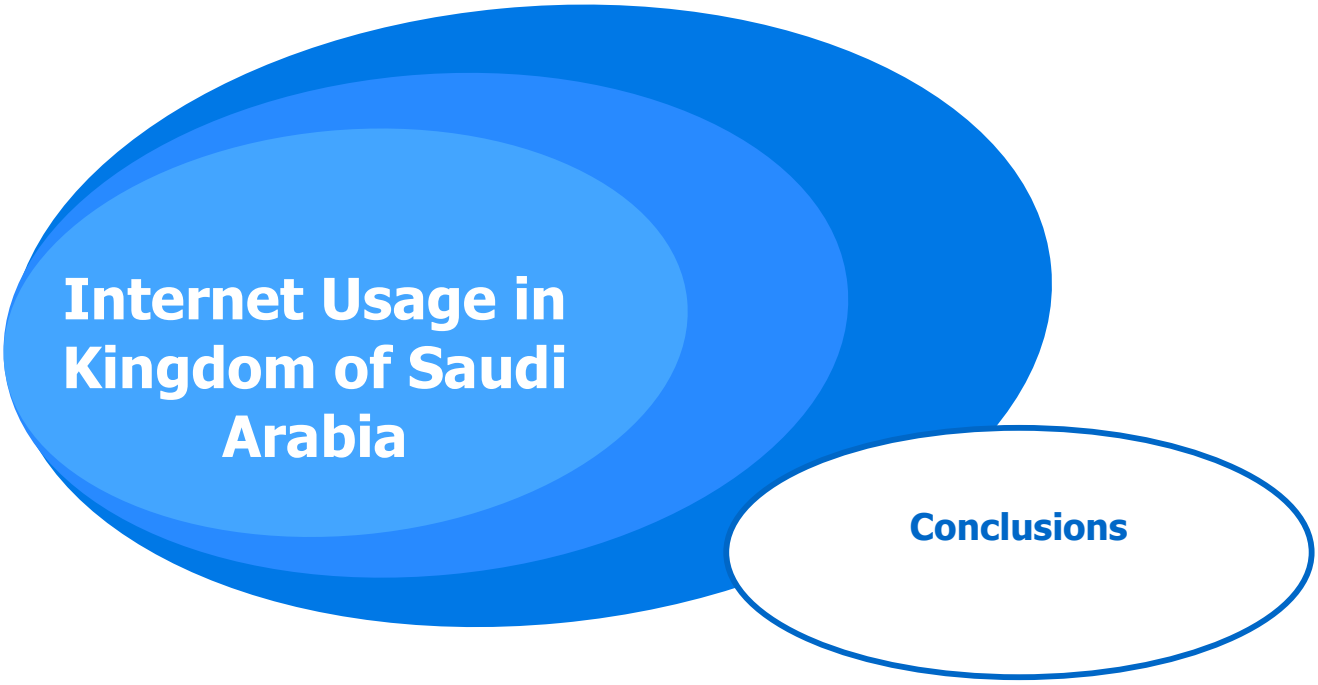


Base : All respondents (1543/ 1546)



Base : All respondents (1543/ 1546)


Internet Usage in Kingdom of Saudi Arabia
Conclusions

9.0 Conclusions

The level of PC penetration in Saudi Arabia is good with about two-third of the population claming to own a Desktop, a Laptop or a PDA. Desktop dominates the PC owners market with more than 90% owning a desktop. Laptops are owned by a little less than half of the PC owners. PDAs, however, have a long way to go – barely 1% own a PDA currently. The key reason among the remaining one-third population for not using a PC is ignorance regarding its use, more so among the relatively older people. However, it is seen that about one-fourth of these non-users intend to buy a PC within the next year. This offers a great opportunity for the sellers of personal computing devices to educate the people regarding the uses and advantages of the devices.

Saudi predominantly is a single device market, with the majority owning one device, be it a desktop or a laptop. Given that the majority owner population comprises of desktop owners, most common place of use is at home with only one-third using at work. Besides, almost everybody in Saudi using a PC does so at least once in a week. The objective is mainly to surf and communicate on the internet and doing educational or office related work. Youngsters are relatively more frequent users, and they are the ones who use internet more, mostly for browsing as well as for e-mailing, chatting, etc.

As far as the operating system is concerned, Windows XP dominates the market. The only exception is Assir where one-fifth of the users have still not moved to Windows XP.

Furthermore, findings indicate that, majority of the users have their operating system in Arabic.

On an average, a PC user in Saudi spends about SR184 in a month. 70% of the PC users use a computer without any IT related training. Among the remaining 30%, majority are trained in MS Office and others in Programming Languages, Accounting Packages, and Database Management. A very small proportion of users is also trained in Autocad and Networking.

About 54% people in Saudi have subscribed to an internet connection. There is variation across provinces with provinces like Eastern province and Makkah having close to two-third of the people with internet connection while in Najran and Jizan, not even one-third of the residents have subscribed to the internet as yet. Currently, the type of internet connection is almost equally split between Dial-up and broadband.

The main reason for not having internet connection among the remaining half of the population is "ignorance". Two-third of these people still wish to subscribe to internet within the next year.

Majority of the users do browsing and chatting or e-mailing on the net. Other than this, youngster are more interested in participating in forums and blogs, while the older respondents carry out banking activities and derive information on health services, etc.

Google is the universal favorite of Saudi browsers with regard to search engines. Other than this, a small segment, majority coming form the older respondents, uses Yahoo as well. About one-third of the user population does not have an e-mail id. Among those who have, majority have it in Hotmail, and the remaining in Yahoo. Internet Explorer is used by nine out of every ten users as their web browser and Arabic is the preferred language of sites browsed – not even one-fifth visit purely English sites.

Broadband owners are generally found to be slightly more satisfied with their ISP connection as compared to the Dial up connection owners. Dial up users not only find it relatively slow, but also slightly more expensive.

A good number of people (40%) in Saudi are concerned about information filtering while surfing the net, more so among youngsters. They feel that this way they miss out on some crucial information and they should get full freedom to surf. Besides this, another issue that almost one third of the internet users in Saudi face is SPAM mails. In fact, the majority of the 15 to 24 years old have more than 10% mails in their in-box as SPAM mails.

E-commerce, as a concept, is not very clear in the minds of respondents, though close to half of them claim to be aware of it. Due to this, and perhaps because they think it is a thing for the next generation, not even one-fifth of the people have ever tried visiting and using any e-commerce. The present users, majority of who have never bought anything online, consider it unsafe to buy on the internet and also do not feel the need to do so. Besides, majority also think there might be concerns regarding the after sales service if they buy goods online.

Unlike e-commerce, awareness about it is better. There are close to half of the people who are aware of it. However, only 6% have ever done e-learning, that is, they have actually ever studied over the internet.

The views on e-learning are much more positive. Majority of people feel that internet not only makes information access easier and convenient, it also is a medium to get the most up-to-date information. Furthermore, they consider internet as the "medium of today's generation".

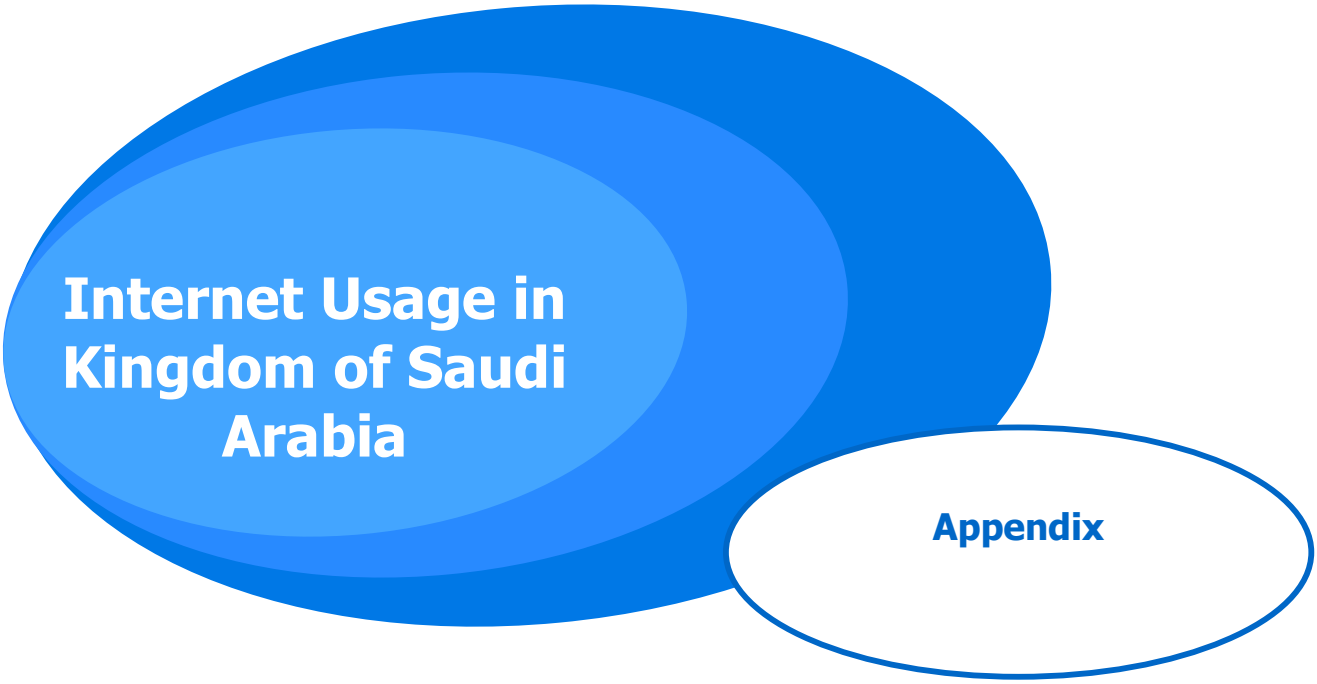
10.0 Summary - Key figures

Related to Computers

		2007	2008
Ownership of a computer in the household		43%	49%
Type of PC *(among PC owners)*	Desktop	88%	77%
	Laptop	46%	59%
	PDA	1%	1%
Operating system usage *(among PC owners)*	Windows XP Home	64%	56%
	Windows XP Professional	23%	32%
	Windows 2000	11%	9%
	Windows Vista	3%	7%
	Windows ME	2%	3%
	Macintosh	1%	1%
Language of the operating system *(among PC owners)*	Arabic	70%	76%
	English	12%	11%
	Both	18%	12%
IT Related Trainings for Individuals *(among PC owners)*	MS Office	15%	5%
	Programming languages	7%	5%
	Accounting packages	7%	4%
	Database management	7%	6%
	Web designing	5%	4%
	No training	70%	79%
Location of computer usage *(among computer owners)*	At home	91%	94%
	At work	34%	32%
	Internet café	15%	13%
	Friend/relative home	6%	7%
	Place of education	5%	7%
Reasons for not using computers *(among non users of computers)*	Don't know how to use it	56%	60%
	Not affordable	23%	14%
	Don't know what to use it for	12%	14%

Related to Internet

		2007	2008
Proportion of individuals who used the internet		30.5%	36%
Type of internet connection (out of total population)	Broadband	15%	27%
	Cable modem	0.3%	0.36%
	ISDN	0.03%	-
	Dial-up	14%	5%
	Wireless	-	0.72%
% female internet users		41%	45%
Frequency of internet usage *(among internet users)*	At least once a day	57%	62%
	At least once a week but not every day	38%	31%
	At least once a month but not every week	5%	5%
	Less than once a month	1%	1%
Web browser usage *(among internet users)*	Internet Explorer	90%	84%
	Netscape	5%	9%
	Mozilla Firefox	-	2%
	Opera	5%	1%
Visiting Arabic web sites *(among internet users)*	10% - 25% Arabic	5%	3%
	26% - 50% Arabic	7%	3%
	51% - 75% Arabic	15%	8%
	76% - 100% Arabic	54%	76%
	All English	19%	11%
Satisfaction with Internet Services *(among internet users)*	Satisfied	66%	72%
	Dissatisfied	11%	7%
Perception on Internet cost	Expensive	26%	22%
	Affordable	30%	37%
Concerns on internet filtering **(***(among internet users)*		40%	33%
Receiving spam emails *(among internet users)*		32%	42%
Reasons for not using internet *(based on non users of internet)*	Don't know how to use it	34%	33%
	Not affordable	19%	11%
	Not available	12%	5%
E-Commerce	Awareness	43%	46%
	Ever bought or sold products online	6%	5%
E-learning	Awareness	49%	55%
	Used e-learning *(among those aware of e-learning)*	4%	5%



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Indicators

Indicator	Definition
Type of Internet connection	Internet connection types currently used ((Dial-Up, DSL, Wireless, Satellite)
Type of PC	Desktop, portable or handheld computer (e.g. a personal digital assistant
Ownership of a Computer	Ownership of a Computer Device (desktop, portable or handheld computer (e.g. a personal digital assistant)
Operating system usage	An operating system (OS) is a set of computer programs that manage the hardware and software resources of a computer. An operating system rationally processes electronic devices in response to approved commands i.e. Windows95, Windows NT, Mac OS etc.
Language of the operating system	Operating system of the computer can be available in different languages relevant to users (Arabic, English etc.)
IT Related Trainings	Trainings taken by the respondents within past 6 months (MS office, programming languages, networking, accounting packages, web designing, AutoCAD, database management etc.)
PC penetration	Proportion of people who have personal computer (Desktop computer / Laptop computer / PDA (portable / handheld computer)
Proportion of households with a computer	Proportion of households who have personal computer (Desktop computer / Laptop computer / PDA (portable / handheld computer)
Subscription to the Internet	Households who subscribe to the internet via (Dial-up (prepaid), DSL / Broad Band, Satellite, Wireless, 3G, GPRS, ISDN, Cable modem
Internet penetration by size class	Internet penetration by SEC
Proportion of individuals who used the Internet	Personal internet usage penetration
Proportion of households with Internet access at home	Whether or not the household is subscribed to the Internet regardless of use (The Internet is a world-wide public computer network. It provides access to a number of communication services including the World Wide Web and carries email, news, entertainment and data files. Access is not assumed to be only via a computer - it may also be by mobile phone, games machine, digital TV etc.)
Household members using Computers	Number of household members using a computer (A computer includes: a desktop, portable or handheld computer (e.g. a personal digital assistant). It does not include equipment with some embedded computing abilities: such as mobile phones or TV sets)
Household members using Internet	Number of household members using the Internet (The Internet is a world-wide public computer network. It provides access to a number of communication services including the World Wide Web and carries email, news, entertainment and data files. Individuals may have accessed the Internet by any means including a computer, mobile phone, games machine, digital TV etc.)
% female Internet users	Proportion of female who use internet

Frequency of internet usage	How many times does the Respondent use the Internet (Frequency of use can be: at least once a day, at least once a week but not every day, at least once a month but not every week, or less than once a month.)
Location of computer usage	Where do people use internet (home, work, place of education, libraries, Internet cafés, shopping malls)
Percentage of the population with access to a PIAC	Where do people use computer (home, work, place of education, libraries, Internet cafés, shopping malls)
Number of (Arabic Search Engines, including those in other countries; number of translation engines, etc.)	Proportion of search engines provide Arabic service
Downloading Habits	Preferred ways of downloading files from internet (Specialized websites (audio media, movies, games, etc), Peer to Peer Software etc.)
Most used internet sites for different occasions	The names of the most used Search Engine, Personal e-mail site, Forum Site, Entertainment Site.
Web browser usage	Web browser is a software application that enables a user to display and interact with text, images, and other information typically located on a Web page at a website on the World Wide Web or a local area network (Windows Explorer, Netscape, Opera etc.).
Visiting Arabic web sites	Percentage the of the Arabic web sites users visit among all the web sites they visit
Concerns on internet filtering	How big of a concern users feel the filtering of the information that can be searched via internet causes (Of very little concern, somewhat of a concern, A major concern)
Receiving SPAM emails	The percentage of SPAM e-mails among all mails received on a day

Diagnostics Information

Indicator	Definition
Reasons of internet usage	Reasons for Respondents personal use of the Internet (Internet activities are: use of the Internet for getting information (several response categories per the model question below), for communicating, for purchasing or ordering goods or services, for Internet banking, for education or learning activities, for dealing with government organizations and for leisure activities. Note that these activities are restricted to private purposes)
Reason of Household Internet Usage	Reasons of household members using internet (getting Information, entertainment, communication, business, downloading, dealing with government organizations/public authorities, education or learning activities)
Reasons for not using, Intent to use in the next 12 months	Reactions internet usage, whether people tend to subscribe internet within the next 12 months
Attitude towards e – commerce	Evaluation of the attributes on e-commerce: – Shopping online saves me a lot of time – I am always very concerned when shopping online due to security reasons – I find online shopping very convenient – It is very easy to compare prices and the options while doing shopping online – There are not enough options on internet in terms of product variety – I have concerns on after sale service when I buy something online – Shopping online is something for the next generation
e-education	Providing and receiving e-education
Non users perception of the internet	Non users' reactions to internet
Investments in training	IT related trainings provided: – MS Office – Programming languages – Networking – Accounting packages – Web designing – Autocad – Database management