

Full Report

The attitudes of online users in the MENA region to  
**CYBERSAFETY, SECURITY AND  
DATA PRIVACY**



راصد **Rassed**

استطلاع أثر الرقمية على المجتمع Exploring Digital Impacts on Society

# The attitudes of online users in the MENA region to **Cybersafety, Security and Data Privacy**

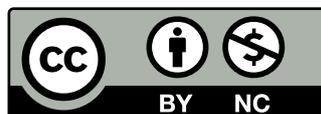
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This report was produced by Rassed.

The Digital Impact and Emerging Technologies Team at the Ministry of Information and Communications Technology (ictQATAR) established Rassed to study the effects of the Internet and Information Communication Technologies (ICT) on society; and the potential of emerging digital technologies.

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## Foreword

In 2012, the Ministry of Information and Communications Technology sponsored research into the Middle East and North Africa (MENA) region as part of the Global Internet Values Project.

The Ministry's involvement followed on from a 2011 study - published initially in the World Economic Forum's Global Information Technology Report 2010-2011 - which explored variations across cultures, in areas such as online freedom of expression, privacy, trust and security. In particular we noted the absence of the Arab world from that report and so we undertook our new research project with the aim of bridging this gap.

As a result, in consultation with the Ministry, the next iteration of this global study - which was led by the Oxford Internet Institute at the University of Oxford, in collaboration with the Samuel Curtis Johnson Graduate School of Management, Cornell University - included 2,793 respondents from across 14 countries in the Middle East.

These conclusions have subsequently been analyzed and contextualized by teams within the Ministry in order to provide a valuable evidence base to help shape our work. In particular, it is worth noting that this document addresses several key Internet topics at a regional level for the first time, providing us with insights that enable us to understand the MENA Internet user as never before.

These five areas of study are:

1. **Access to Technology:** Building a picture of the Arab Digital Household.
2. **Attitudes:** Exploring the views of Internet users in MENA towards the web.
3. **Level of Concern:** Examining the extent to which MENA Internet users are concerned about issues such as the repurposing of their personal online data, or the risk of someone breaking into their Internet account or email.
4. **Trust:** Discovering the levels of trust Internet users invest in different Internet online players and third parties, from Governments to Banks and Internet Service Providers (ISPs); and whether MENA Internet users feel that their data is kept safe by such entities.
5. **Behaviors:** Understanding if user attitudes and concerns are reflected in the online activities undertaken by MENA's Internet population.

The data also enables us to map the attitudes and behaviors of MENA's Internet users against Internet users in other regions; thereby benchmarking for the first time the online experience of users in MENA against other parts of the world. It also shows that although users across the globe have many things in common, MENA Internet users do show distinctive characteristics around issues such as the role of Government in blocking harmful content, and in their behaviors around e-Commerce and cybersafety.

Subsequently, our report offers conclusions which we believe will be of particular relevance to Government agencies, regulators - as well as academic, civil society and industry stakeholders - across the region; and globally.

Because we also recognize that studies such as these provoke many questions, we have also made comments and recommendations for areas of future study which we - or others - may want to address.

Finally, we have also included some links to other interesting reports worth noting, as well as tools and tips to encourage safe Internet usage; building on many of the themes and conclusions which derive from our research.

In producing this paper I am very grateful to Professor William H. Dutton and Ginette Law from the Oxford Internet Institute at the University of Oxford, and Professor Soumitra Dutta from the Samuel Curtis Johnson Graduate School of Management at Cornell University for all of their help; which included presenting preliminary data findings to Ministry staff. We also benefited from guidance provided by Dr. Kaltham Al Ghanim at Qatar University, who kindly reviewed our research findings.

I hope you enjoy this report.

**Dr. Hessa Al-Jaber**

Minister of Information and Communications Technology

## Executive Summary

Our research shows that despite coming from a different cultural context, Internet users in the Middle East share many of the same concerns about online privacy and safety as Internet users in other parts of the world.

Understanding - and addressing - these concerns is essential if take-up of e-Government and e-Commerce is to be encouraged, and to ensure that outreach activity can be targeted to address the particular needs and anxieties of MENA's Internet users.

### 10 key findings:

1. The majority of Internet users in MENA access the web from home.
2. They are considerably less likely to make online purchases or do online banking compared to other regions.
3. MENA Internet users are considerably more likely to agree with the statement that "the Internet is making things better for people like me" – when compared to the world average.
4. They are also more supportive of the idea that Government authorities should block harmful online content than users elsewhere in the world.
5. When compared to the world average, MENA Internet users show similar levels of concern about their online communications being monitored. Nonetheless, a sizeable number are also quite relaxed about this issue.
6. Internet users in North Africa are much more inclined to believe that their personal data is safe online compared to other Internet users in both the Gulf Cooperation Council (GCC) and globally.
7. Amongst different online players; banks and financial institutions in the region enjoy the highest levels of trust, followed by health and medical service providers and Government authorities.
8. Nearly 50% of MENA's Internet users say they are "very careful" about what they say and do on the Internet.
9. Despite this, they are among the most likely to open attachments, documents and emails from senders they do not know; and amongst the least likely to scan their computer or mobile device for viruses and spyware.
10. They are also among the most likely to meet people online that they have not met in person, and are more likely to accept to be "friends" with someone online - or to make "connections" with people they do not personally know - than users in any other region.

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## Introduction: Why this report is important

This report was written in early 2014 against a backdrop of news stories and discussions<sup>3</sup> related to increased levels of cyber warfare<sup>4</sup> and the safety of personal online data.<sup>5</sup>

Prominent recent examples include the hacking of credit and debit card data belonging to 40 million Target shoppers in the USA<sup>6</sup> and the theft - and reselling - of personal details belonging to 20 million South Korean credit card holders<sup>7</sup>, as well as incidents closer to home, such as the hacking of the Qatar Foundation's social media accounts.<sup>8</sup>

Alongside this, 2013 also saw a series of revelations by Edward Snowden, former consultant of the US National Security Agency (NSA), about mass online surveillance programs seemingly countenanced at the highest levels of Government.<sup>9</sup>

Events such as these have helped to keep issues related to data privacy, cybersafety and cybersecurity in the public eye.

Together with these public developments, an emerging research base is beginning to give us a sense of the privacy challenges faced by digital consumers across the globe.

A 2013 survey by the US-based Pew Research Center, for example, found that 21% of participants reported that their email or social networking account had at one time or another been compromised. In the same report, 12% of participants said that they have been stalked or harassed online, whilst 11% reported the theft of important personal information such as social security numbers, bank account and credit card information.<sup>10</sup> For many people these will, understandably, be worrying statistics.

Meanwhile, it isn't too difficult to find instances where individuals have behaved in an irresponsible manner online, with the result potentially impacting them negatively on both a personal and professional level.

A recent CNN article - "Ten People Who Learned Social Media Can Get You Fired" - highlighted a number of examples which demonstrate why individuals need to understand – and manage – their privacy settings in a space which often straddles our private and working lives.<sup>11</sup>

In addition to this, websites such as Failbook<sup>12</sup> and Oversharers<sup>13</sup> show – in a more humorous and usually redacted environment – the lack of boundaries sometimes exhibited by social media users. Despite their jocular nature, these sites nonetheless demonstrate the increasing need for online users to manage their digital identity and apply filters to the information and personal details they share online.

It is against this wider setting that we have produced this report, examining some of the key concerns related to the attitudes of online users in the Middle East and North Africa (MENA) towards the Internet, cybersafety, security and data privacy. Many of these questions, which were asked in fieldwork conducted in late 2012, are being explored at a regional level in this report for the first time.

By providing an opportunity to understand the similarities – and differences – between online users in MENA and the rest of the world, this ground-breaking report potentially offers detailed insights which can inform policy and regulation across the region.

As the Middle East's Internet population continues to grow - and more services migrate to being online only or "digital first" - understanding user attitudes and behaviors becomes ever more important.

This report offers us an evidence base to track changes over time and we hope that it will be the start of a longitudinal study which over time can be of value to industry, Government, civil society organizations and researchers across MENA and beyond.

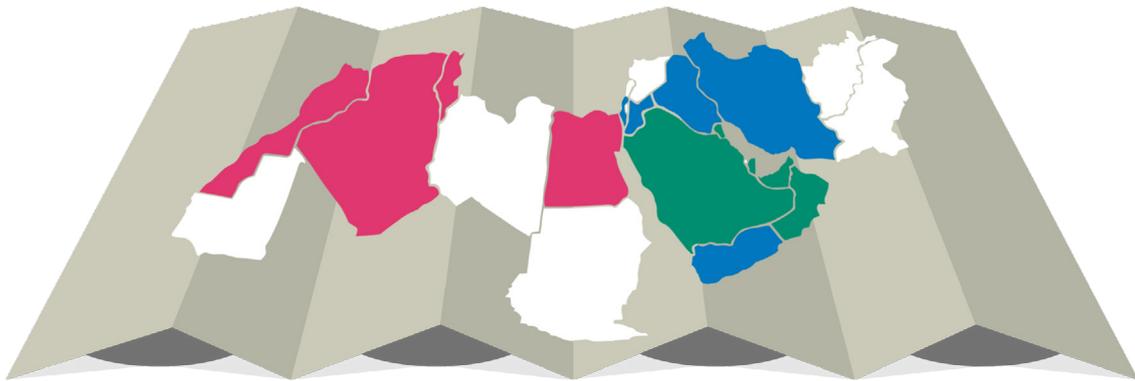
## How to read this report

The charts and tables in this report use data collected through an online survey of 2,793 Internet users in 14 MENA countries between July -September 2012, as well as a further global sample of 8,432 respondents from 44 other countries.

*For more information on our research methodology see Appendix 1.*

## Countries we have surveyed

Algeria	Egypt	Kuwait	Qatar	Oman	Iraq	Iran
Morocco	Tunisia	Saudi Arabia	UAE	Bahrain	Jordan	Yemen



## 1

## Technology and the Internet – The Arab Internet user

In this section we look at access to technology in households and what online users in the Middle East use the Internet for.

The data provides some interesting differences across the MENA region – in particular between GCC and North Africa households in terms of access to technology – and offers some interesting comparisons with global averages.

We also explore where web users go online, as well as what activities they undertake once connected. This enables us to develop a picture of Internet users in the Middle East, and in particular – through the activities they undertake online - develop an understanding of their drivers and motivations for using the Internet.

Although our data does not explore the frequency of online behaviors, we have referenced other recent research that has begun to explore these questions. In doing this, we found that a number of our key observations mirror findings from other datasets, particularly around the popularity of the home environment as the primary location for people to go online.

Understanding the frequency of certain online behaviors in different MENA markets is one area where future research may be beneficial. However, in the first instance, the insights provided in this section allow us to develop a broad picture of online behaviors in MENA in a depth not previously reported.

As with much of this report, this section provides a foundation for future research and helps to pose questions which a range of agencies may seek to explore and address.



### Summary

- MENA households enjoy many forms of domestic technology in line with the world average, with usage of Satellite TV 37% higher than the global figure.
- There are major differences in access to technology between households in GCC and North Africa. This is particularly true for tablets and game machines. Fixed line and webcam ownership enjoys much greater parity.
- The majority of Internet users in MENA access the web from home.
- MENA Internet users are considerably less likely to make online purchases or do online banking compared to Internet users in other regions.
- Adoption of the Internet amongst MENA users - in terms of both years online and time spent online each week – is in line with global averages.

## a. Access to technology

The Middle East is a large and diverse region. This diversity is reflected in the range of languages used to communicate online<sup>14</sup> as well as the access enjoyed by the MENA population to different technologies.

As Northwestern University in Qatar recently noted in their report on Arab media use, there is:

*“...a genuine digital divide, between the four wealthy Gulf states – Bahrain, Qatar, Saudi Arabia and UAE – and those that do not share such abundance – Egypt, Jordan, Lebanon and Tunisia. The digital divide demarcates technological abilities in the Arab world about as starkly as anywhere on earth.”<sup>15</sup>*

However, taken as a whole, the region has access to many forms of domestic technology in line with – and on occasion above – the world average (see Figure 1).

There are the only two types of technology, from the nine reported in Figure 1, where MENA households – both collectively and at a GCC and North Africa level – score below the world average. These two technologies are usage of cable and ownership of MP3 players.

### Television and Fixed Line

Satellite TV has a very high penetration rate across the region (87%), well above the global average (50%). The extent of this variance from the global norm is just one of the reasons why cable penetration is much lower at 36% in MENA compared to a global average of 56%.

As broadband adoption increases across the region it will be interesting to see if satellite usage drops as users move more to Internet Protocol television (IPTV) and other over-the-top content (OTT) solutions,<sup>16</sup> or whether it continues to retain such high levels of penetration.

In other areas of technology usage, such as fixed line phones and e-readers, availability in MENA households is broadly in line with global averages.

### Understanding regional differences within MENA

The most striking element of our data however lies in some of the key differences which can be seen between GCC and North

African Internet users. This demonstrates the importance and value we have seen in being able to split our MENA sample into GCC and North Africa households/Internet users.

The extent of these differences can considerably skew the overall MENA figures, which have been derived at by combing the GCC and North Africa datasets, coupled with additional countries such as Jordan and Yemen.<sup>17</sup>

Although the extent of differences may be less than initially expected; differences do exist. This is particularly true in terms of household access to technology (and less so, in terms of key online attitudes and behaviors).

### Tablets, Game Machines, Digital Cameras and MP3 Players

In our survey this contrast can clearly be seen in areas such as access to tablets (70% in GCC, compared to 33% in North Africa) and game machines/consoles (62% in the Gulf Countries versus a total of 36% of households located in North Africa).

Further differences between GCC and North Africa households can be seen in access to digital cameras and MP3 players.

When looking at the penetration of tablets, the high penetration of this technology in the Gulf – which is 29% higher than the global average, and a staggering 47% higher than the level of availability in North Africa – results in the overall MENA figure coming out as above the global average (49% in MENA versus 41% worldwide). This is despite availability in North African being several percentage points below the worldwide average (33% v 41%).

By the same token, taken in aggregate, the MENA figure for game machines is the same as the world average, at 48%. In reality however, the MENA figure is predominately made up of two very different sets of take-up data (62% penetration in GCC countries versus 36% in North Africa).

## b. Duplication of functionality

In some areas where the penetration of technologies at a household level is below global averages the reasons for this may be the high penetration of other technologies.

For example, the high penetration of Satellite TV is no doubt a reflection of low cable availability and take-up. However, with 39% penetration of cable in MENA and 87% Satellite TV penetration, this suggests that many households have access to both platforms. The reasons for this duplication would be interesting to examine in a future study.

Similarly, the relatively low (when compared to global averages) take-up of digital cameras and MP3 players – particularly in North Africa – may be a product of socio-economic factors and the frequent availability of this functionality on both smartphones and

feature phones. As a result, some MENA users may not feel the need to own additional devices which simply offer applications already provided by their mobile phone.

Alongside potential scenarios around duplication of devices (and the economic costs associated with this), the availability of Arabic digital content may also be a consideration which has shaped the purchase levels of MP3 players in the region.

This has begun to change with the introduction of music download and streaming services such as Deezer, Yala Music and Anghami, but despite the introduction of these new services, this is a market where the breadth of available content – as well as its take-up – is lower than many others.<sup>18</sup>

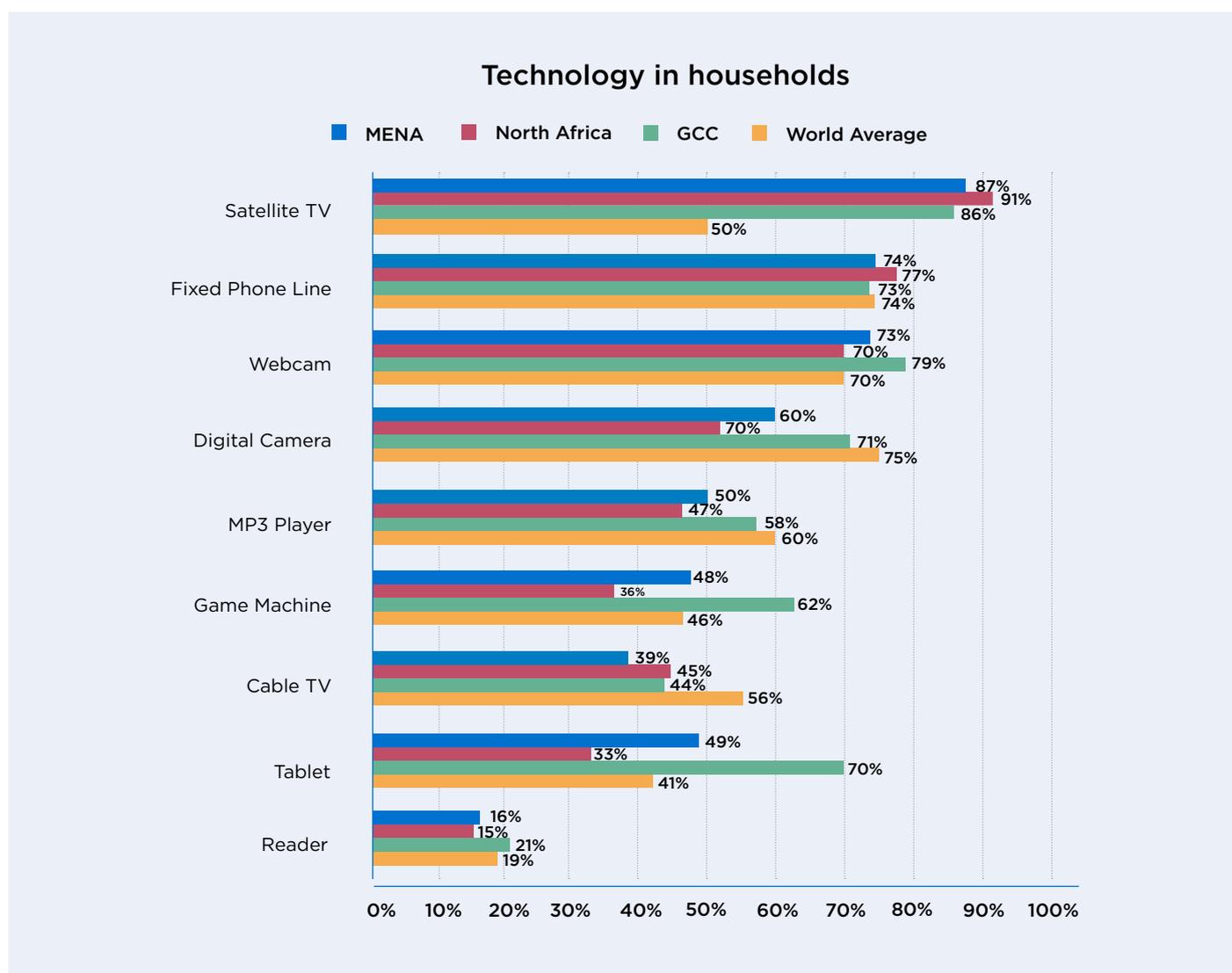


Figure 1: Technology in households

Anecdotally, one way in which this shortage of Arabic digital content has begun to be addressed is through music being uploaded directly by users onto sites such as YouTube. Consumers may not be aware that they can transfer this content onto their MP3 players (although the legality of such behavior is open to debate<sup>19</sup>) and this lack of awareness – coupled with a relative lack of content – may also influence the decision to purchase certain technology types.

There seems to be, however, a small variance in location of Internet usage between Internet users in North Africa and GCC.

Internet users in North Africa are slightly less likely to go online at home compared to their GCC counterparts (92% versus 96%) and collectively MENA Internet users are marginally less likely to go online at home than the global average (93% compared to 96%).

### c. Internet Usage: Where users go online

In regards to where people go online, the majority of Internet usage in MENA – as well as globally – takes place at home (see Figure 2).

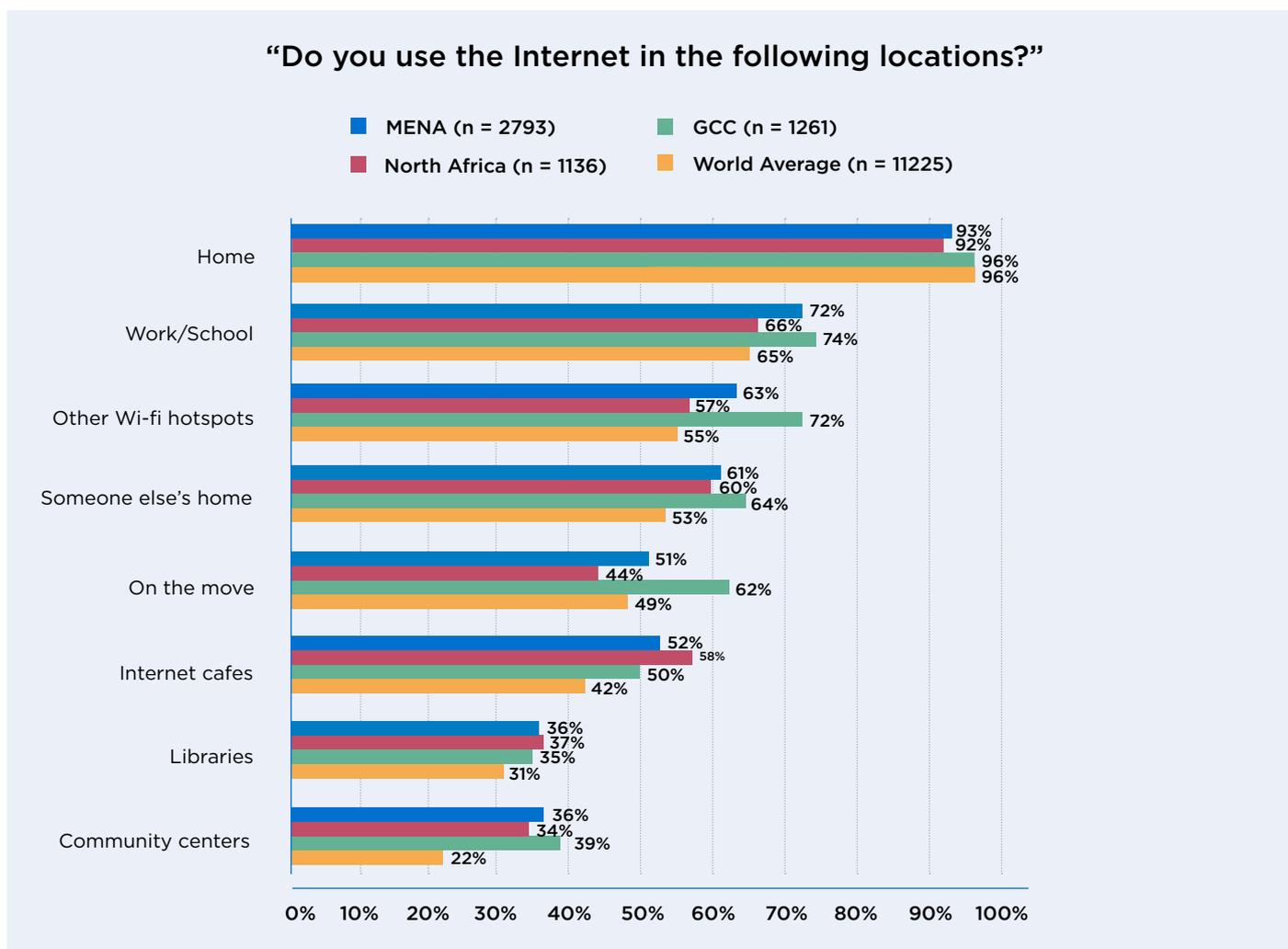


Figure 2: Internet use by location

Additional surveys have reinforced our finding about the predominance of home Internet usage. The research company IPSOS has reported<sup>20</sup> that 87% of MENA Internet users access the web from home<sup>21</sup> whilst Booz and Co – in their research into the Arab Digital Generation (online users aged 15-35) – found that even amongst young people, the home environment was the primary location for Internet access (see Figure 3).

Booz and Co's findings – whilst focused on a smaller demographic – also reinforced our findings (see Figure 2) that Internet users in the GCC are much more likely to access the web in public places and on the move than their counterparts in other parts of the region, and indeed the globe.

<b>Internet users in Middle East and North Africa, by Access Location, July 2012</b> % respondents			
	Gulf Cooperation Council*	Levant**	North Africa***
At home	70%	75%	83%
On the move	65%	53%	28%
Public spaces	20%	22%	13%
Internet cafes	9%	9%	17%

*Note: ages 15-35; \*Bahrain, Kuwait, Qatar, Saudi Arabia and the UAE; \*\*Lebanon and Jordan; \*\*\*Egypt and Algeria*  
Source: Booz & Co. and Google, "Understanding the Digital Generation" conducted by YouGov, Oct. 1, 2012

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**Figure 3: Internet use by location<sup>22</sup>**

The high penetration of smartphones in the GCC are likely to account for levels of access on the move.

Data compiled by Statista reported that three in four people in the United Arab Emirates own a smartphone; with the UAE topping the list of countries with the highest smartphone penetration in the world, just ahead of South Korea and Saudi Arabia.<sup>23</sup> Although access to this technology does not necessarily translate into usage of smartphone features such as apps and mobile media,<sup>24</sup> it does nonetheless make it both easier, and more likely.

Conversely lower levels of smartphone penetration are probably a principle reason behind the greater levels of fixed location usage (e.g. home and Internet cafes) which can be found amongst younger North African Internet users (see Figure 3).

As eMarketer notes: "This is a common trend in the developing world, where people first go online at these locations before access is supplanted by home computers and mobile devices."<sup>25</sup>

#### **d. Internet Usage: Time spent online**

In terms of time spent online (see Figure 4), the volume of Internet usage amongst MENA survey participants is in line with global

respondents; with 40% of MENA Internet users saying they access the Internet for over 20 hours a week (compared to 39% globally). At the other end of the scale 13% of MENA Internet users stated that they used the web for between 0-5 hours a week (against a world average of 10%).

This is another area where we saw a negligible variance between GCC and North Africa Internet users. Broadly speaking, Internet users in these two parts of the MENA region access the Internet for a similar number of hours a week.

Within this, there are likely to be some variances, with young people often the most likely to be amongst the heaviest Internet consumers. Research by Booz and Co into the Arab Digital Generation<sup>26</sup> showed that 83% of these Internet users reported using the Internet daily, with 40% doing so for at least five hours a day (see Figure 5).

These statistics suggest the potential value in interrogating our dataset further, but in the first instance, our research shows that despite being an evolving Internet market, MENA Internet users (taken in aggregate) are online for much the same length of time – and in similar proportions – to other parts of the world.

“What is the total number of hours that you spend using the Internet per week?”

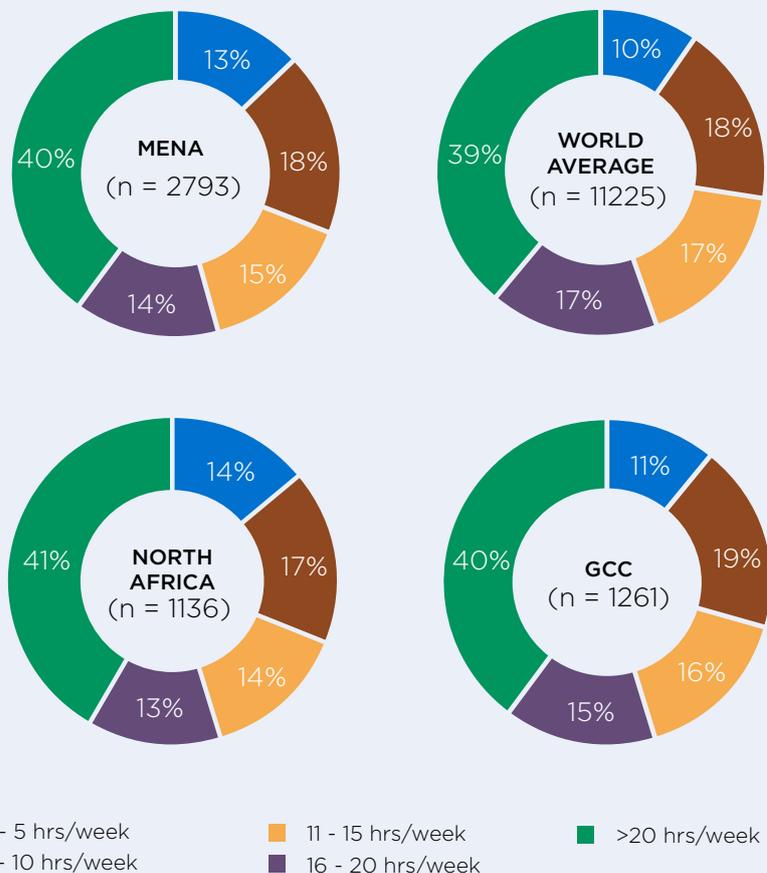


Figure 4: Hours of Internet use per week

Daily Time Spent with Media According to Consumers in the Middle East and North Africa, July 2012			
% total			
	<30 minutes	<30 minutes - 3 hours	3+ hours
Print	10.6%	8.6%	7.6%
Radio	7.4%	5.4%	5.4%
TV	7.8%	6.1%	4.9%
Internet	7.0%	5.4%	4.7%

Note: ages 15-35; \*Bahrain, Kuwait, Qatar, Saudi Arabia and the UAE; \*\*Lebanon and Jordan; \*\*\*Egypt and Algeria  
 Source: Booz & Co. and Google, “Understanding the Digital Generation” conducted by YouGov, Oct. 1, 2012

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Figure 5: Daily time spent with media<sup>27</sup>

### e. Internet Usage: Time spent online by location

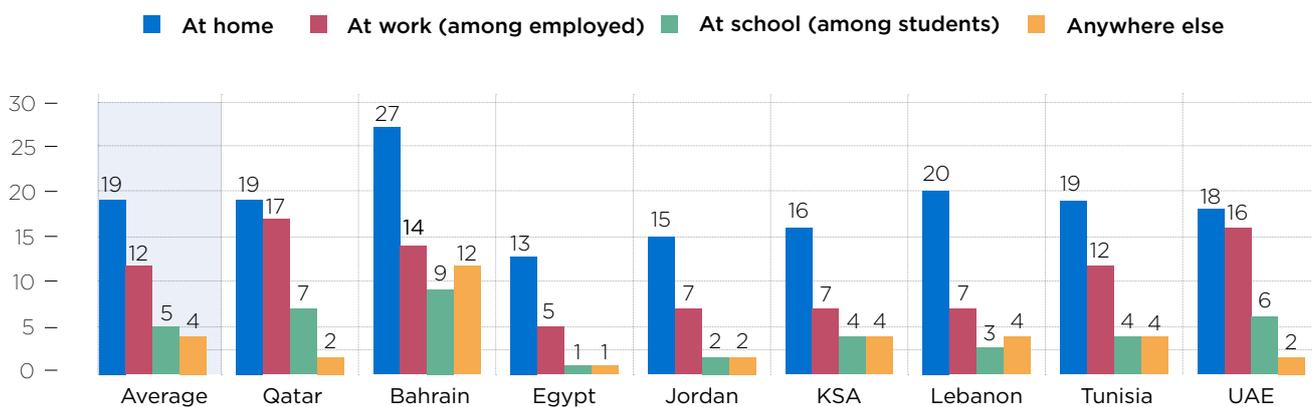
The prevalence of home Internet usage that we saw earlier was reinforced in a 2013 report from Northwestern University in Qatar, which provided a country level breakdown of the differences in location for Internet use (see Figure 6).

In Bahrain, for example, home Internet usage at 27 hours a week is almost twice the number of hours spent online at work, whilst in

UAE and Qatar the difference is minimal; with home usage only being two hours more on a weekly basis than the time spent online at work.

Despite these differences, in all eight countries surveyed by Northwestern “at home” is the location where the most time is spent using the Internet each week.

Time Spent Using the Internet Per Week at Each Location



BASE: INTERNET USERS  
 Q17: On average, about how many hours per week do you use the Internet in the following locations?

Figure 6: Hours per week using Internet - Northwestern University in Qatar<sup>28</sup>

### f. Internet Usage: Years of experience

In line with respondents to the global survey, the participants from the MENA region who took part in our online questionnaire are established Internet users. This is to be expected with an online research instrument.

Well over half of respondents from both the GCC and North Africa stated that they have been using the Internet for more than five years (see Figure 7).

In contrast, new users, or respondents who have been using the Internet for less than two years, constitute just 10% of our MENA base, broadly in line with the global figures for this survey.

In answering the question – “approximately how long have you been using the Internet?” – we saw some differences between Internet users in the GCC and North Africa; notably a larger proportion of GCC Internet users having been online for 6-7 years (60% versus 48%) whilst North Africa Internet users are more likely to have come online for the first time in the last 2-5 years (21% versus 13% of GCC respondents).

We also noted some differences in Internet experience between MENA and the rest of the world. Globally, the number of survey participants who are new Internet users (in this instance meaning anywhere between 6 months and 5 years) is a little higher in MENA than the rest of the world (27% for MENA versus 21%).

The implications of this for our report is that our conclusions typically reflect the attitudes and behaviors of more experienced Internet users.

As the Oxford Internet Institute’s William Dutton and Grant Black noted in their 2011 report; Next Generation Users: The Internet in Britain 2011:

*“The Internet connects a wide array of people, from computer scientists developing new standards, to individual users accessing the Internet from different locations and with different devices. Beyond mere access, however, navigating the Internet also requires certain experience and skills to use the technology and evaluate a variety of online contexts.”<sup>2</sup>*

Often developing these skills takes time (although younger digital natives may be exceptions to this) and as a result we may see some correlation between how long someone has been using the Internet and some of the behaviors and attitudes they portray.

Recognizing this, we have explored, in a few instances, some differences between respondents attitudes and opinions; mapping this against their Internet experience and specifically how long they have been online. Given our initial findings in this space, this is an area we may wish to explore further in future studies.

### g. Internet Usage: What activities MENA Internet users engage in online

We have seen that many MENA Internet users have similar experience levels to other parts of the world, and that typically most of their time online takes place at home. Moreover, the relatively low usage of the Internet at work and at school may influence the type of activities people engage in while online.

We asked respondents to rate the frequency with which they undertook a range of different online activities (see Figures 10-14) ranging from “never” to “less than monthly”, “monthly”, “weekly” or “daily”.

#### Online media consumption

In terms of online media consumption (see Figure 8) MENA Internet users are more likely to watch videos online than Internet users in any other region of the world.

In addition, they are amongst the most frequent downloaders of online content and also “get music” online more frequently than Internet users in Europe, Oceania and North America (although less than users in Asia and Latin America).

MENA Internet users are also more likely to meet new people or make new connections online than Internet users in more established markets like North America and Europe, doing this more frequently than any other region apart from mainland Africa.

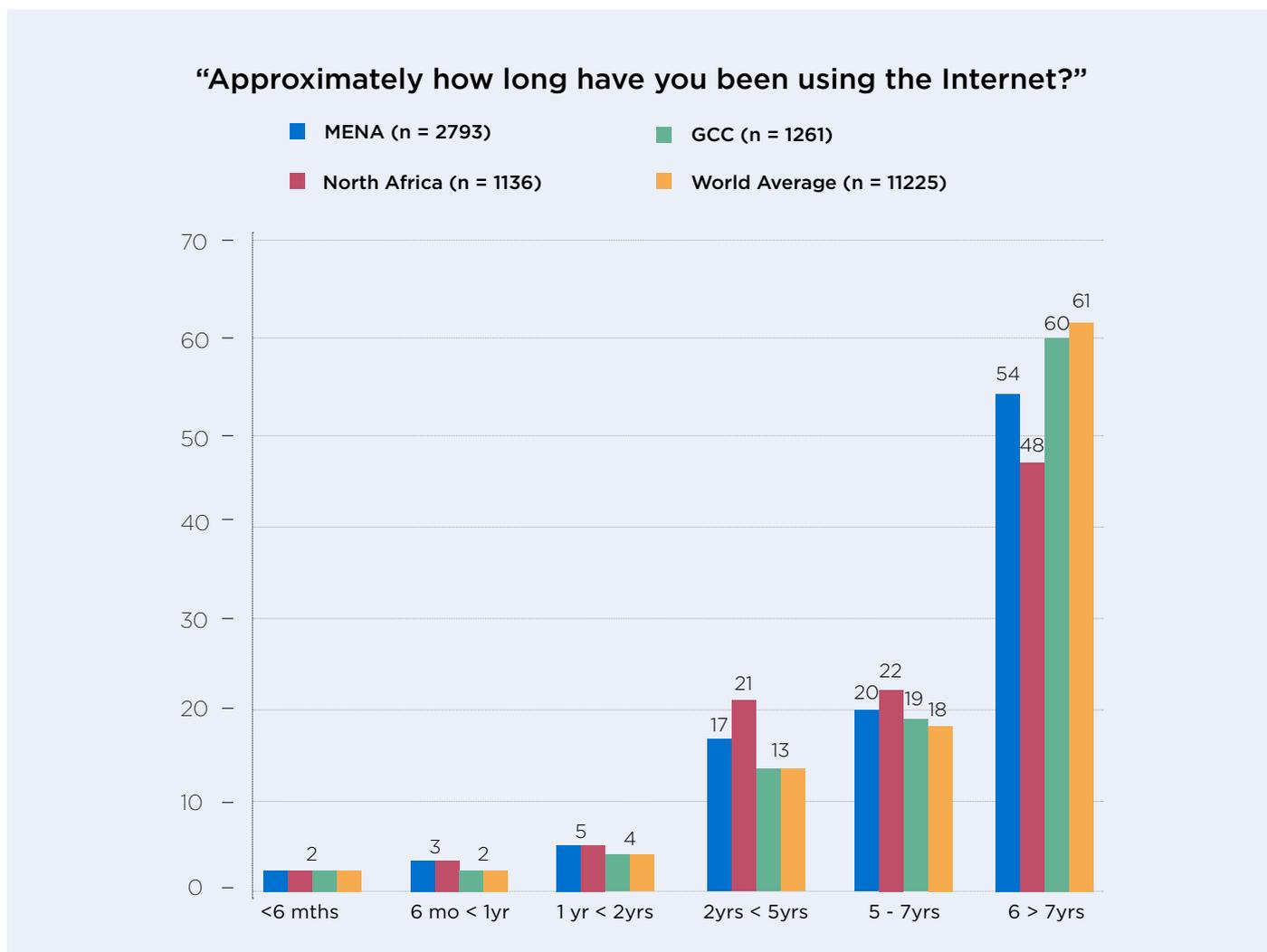


Figure 7: Experience – how long have respondents been using the Internet

### Types of online activity

Looking at types of online activity undertaken by Internet users (see Figure 9) such as checking email or surfing the web for information, then the behavior of MENA Internet users becomes broadly aligned with online consumers in other countries.

MENA Internet users are however more inclined - than Internet users in North America, Oceania and Europe - to use social media

platforms on a regular basis, as well as check the news online, communicate with friends and share pictures of friends, family or colleagues.

Interestingly, all four of these activities are undertaken more regularly in emerging online markets such as MENA, Africa, Latin American and Asia.

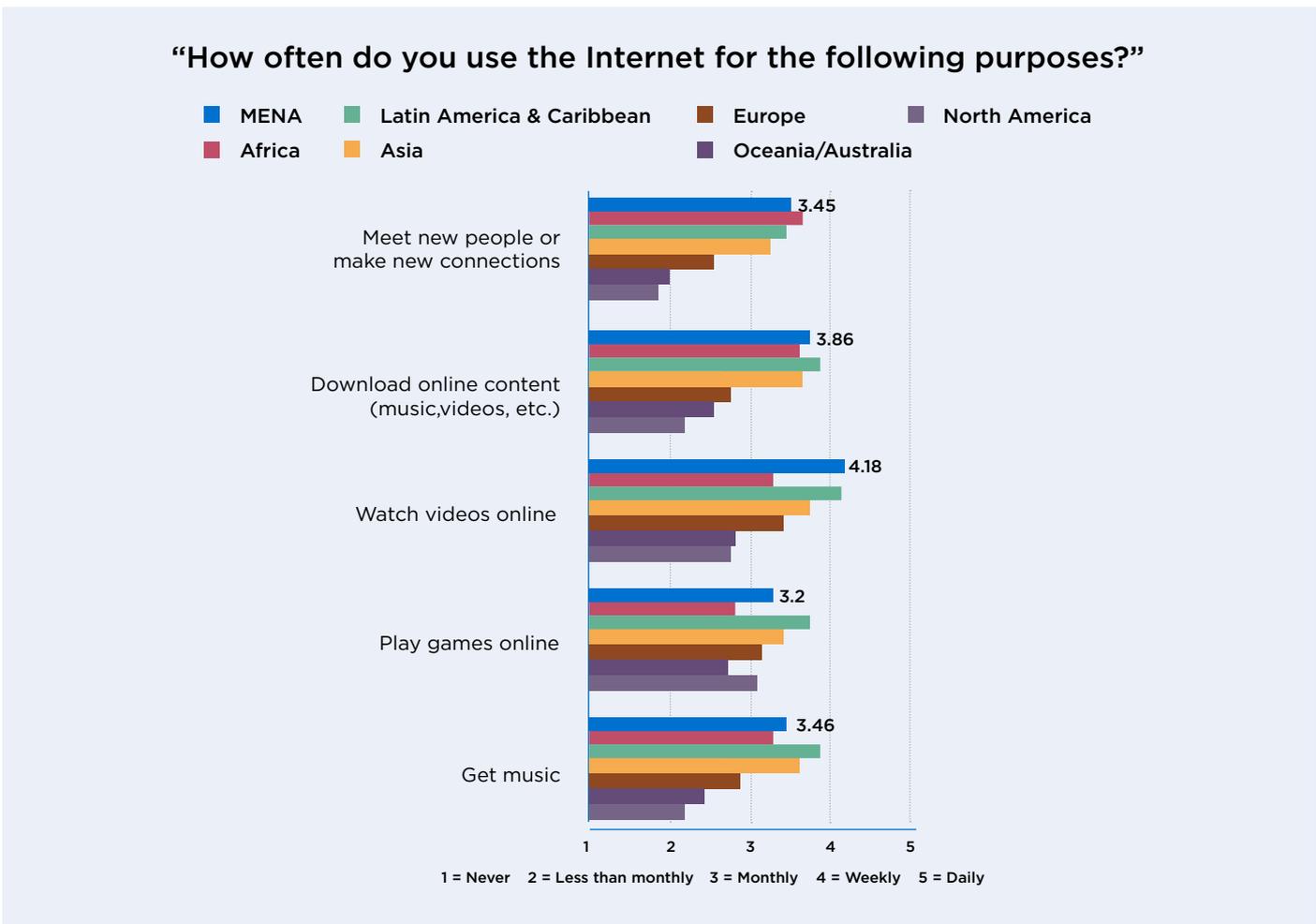


Figure 8: What people use the Internet for – types of media

### “How often do you use the Internet for the following purposes?”

■ MENA    ■ Latin America & Caribbean    ■ Europe    ■ North America  
■ Africa    ■ Asia    ■ Oceania/Australia

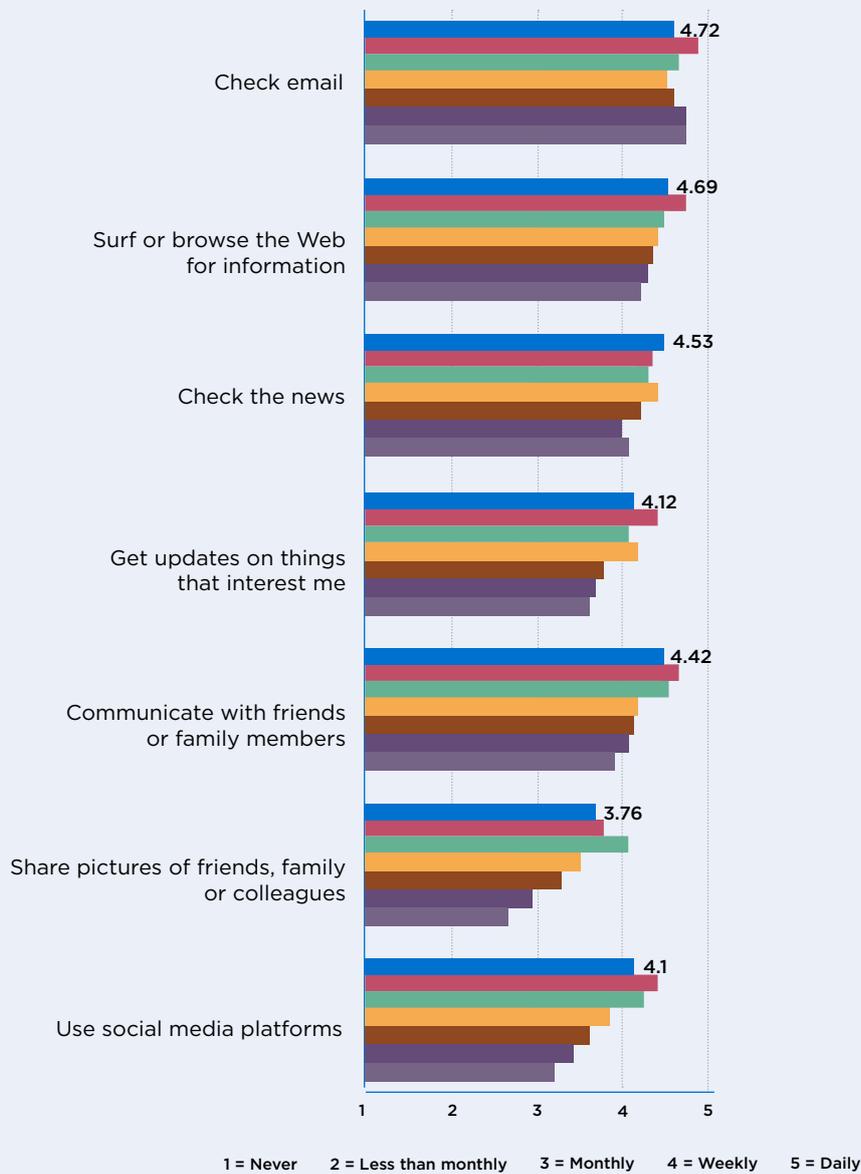


Figure 9: What people use the Internet for – types of online activities

### Usage of online products and services

When examining usage of Internet services (see Figure 10) there are some major differences between the activities undertaken by MENA Internet users and other parts of the world.

Most notably MENA Internet users are considerably less likely to make online purchases or do online banking. However, they are more likely to make video calls on a more regular basis than in any other region.

MENA Internet users are also amongst the least likely to get travel directions online or use the Internet to find a location on a map - perhaps a reflection of the fact that services such as Google Maps are typically less developed in some parts of MENA than in a number of other regions (and that many urban conurbations in MENA are growing and changing very quickly, making this mapping quite challenging).

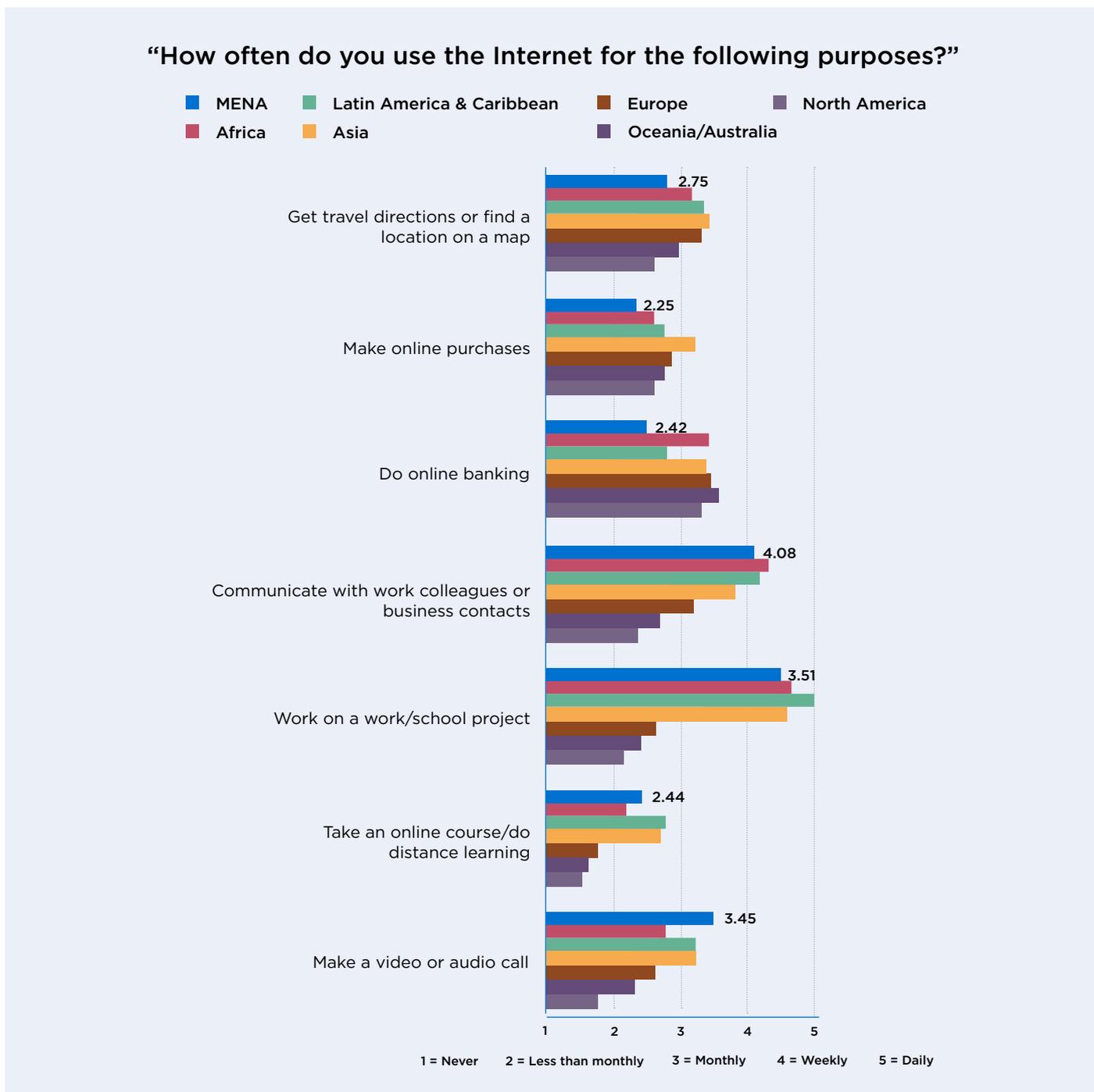


Figure 10: What people use the Internet for – online products and services

### Web 2.0 activities

When it comes to social media and Web 2.0 activities - such as posting pictures and photos or updating their social network profile - MENA Internet users are more active than online users in North America and Oceania, and typically more active than users in Europe (See Figure 11).

MENA Internet users report that they are amongst the most active in terms of posting messages on social networks and forums, as

well as posting pictures and photos – with many doing so on a monthly basis.

However, Internet users in Africa and Latin America post messages on social media platforms or forums with an even greater frequency than their Middle Eastern counterparts.

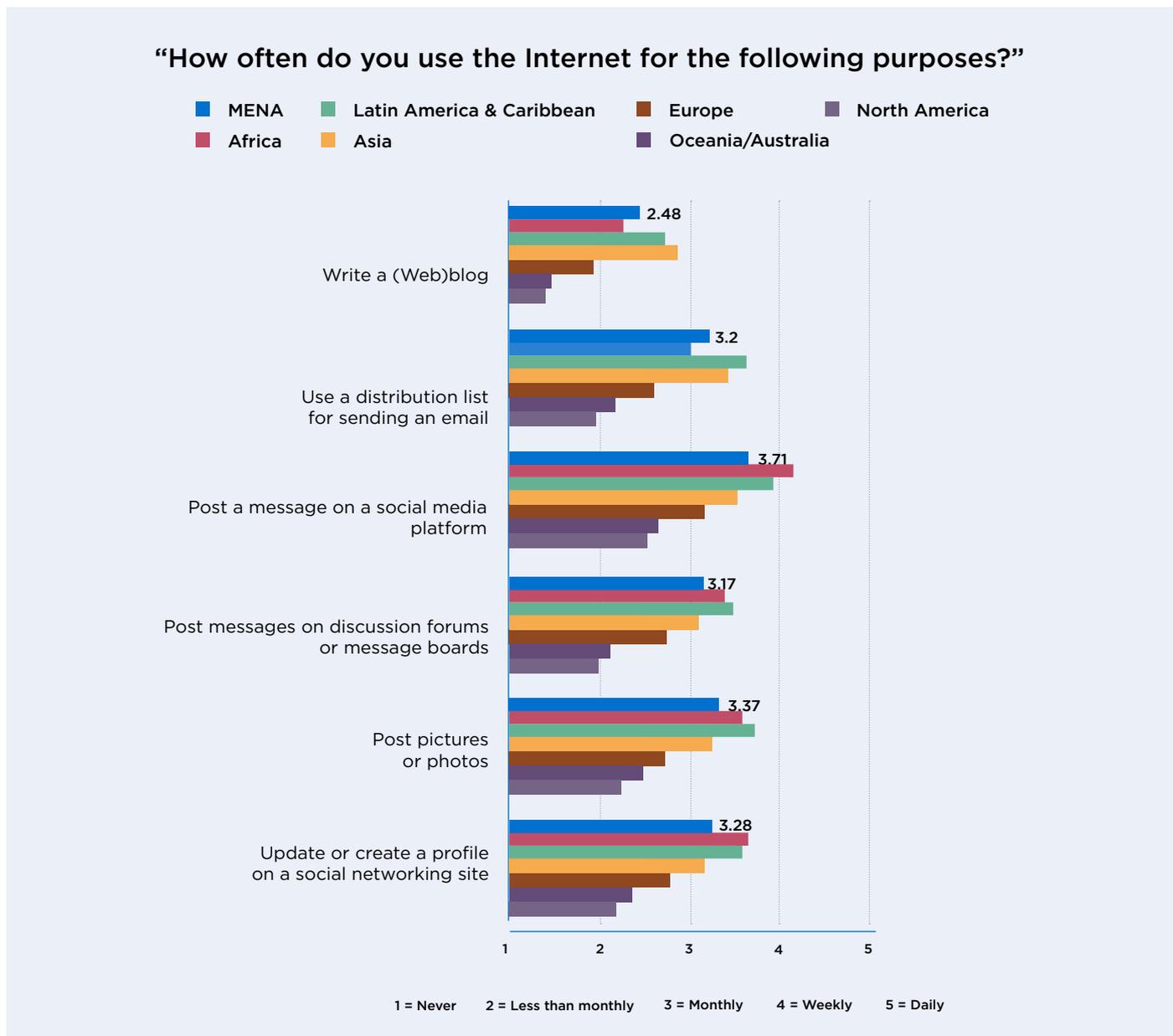


Figure 11: What people use the Internet for – Web 2.0

### Online and creative expression

Finally in this section we also asked online users about a number of different ways in which they expressed themselves online. This included creative processes such as posting videos and podcasts, through to more politically orientated activities such as signing online petitions or commenting about politics.

Our research showed that whilst Latin American Internet users are also the most likely to post videos or sign online petitions (see Figure 12), MENA Internet users claim to be the most likely to express an opinion about politics online.

They're also the second most likely to maintain a personal website - behind online users in Latin America and the Caribbean.

It is interesting to note that, again, these opportunities for online expression appear to be most enthusiastically embraced in emerging online markets.

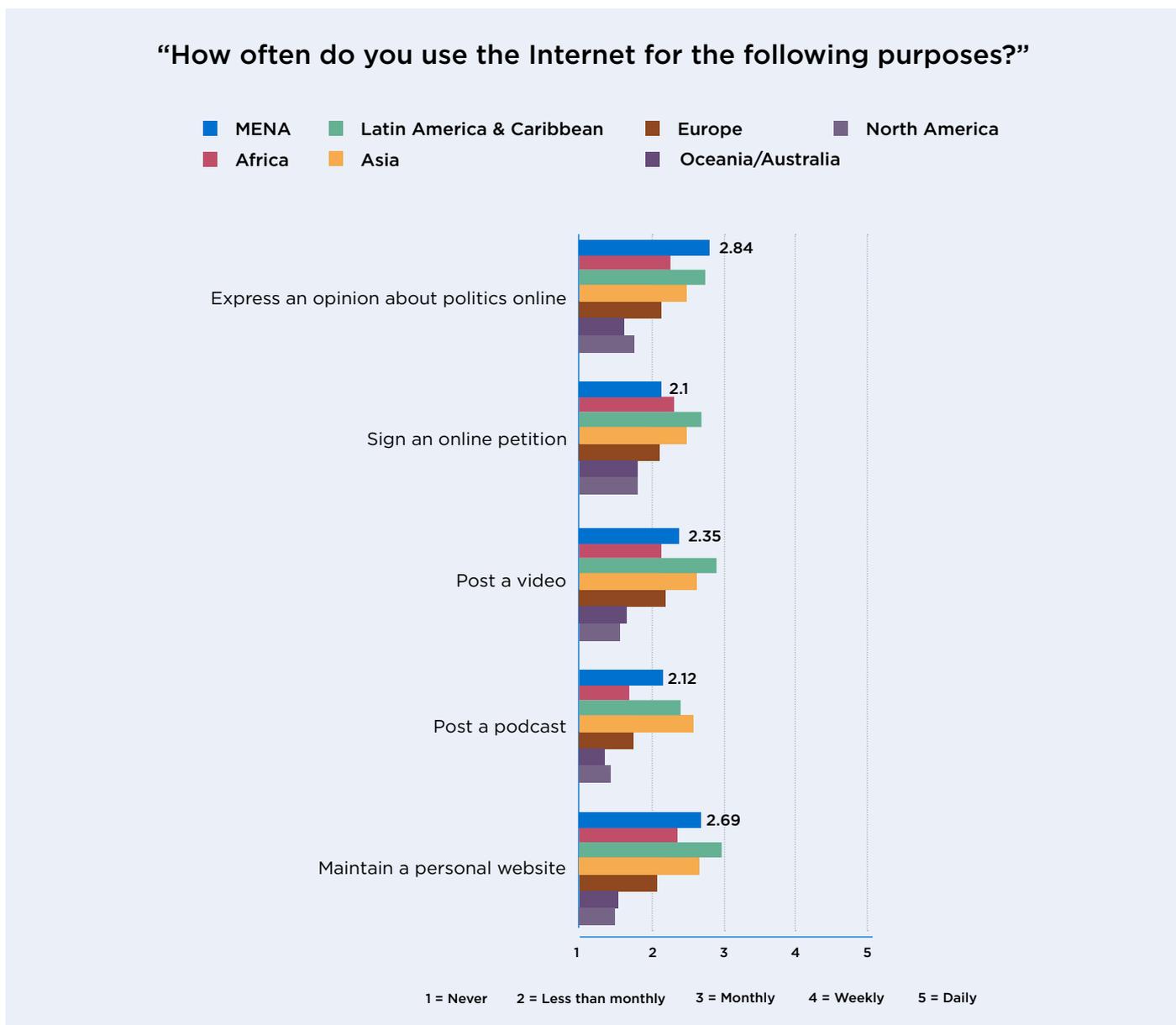
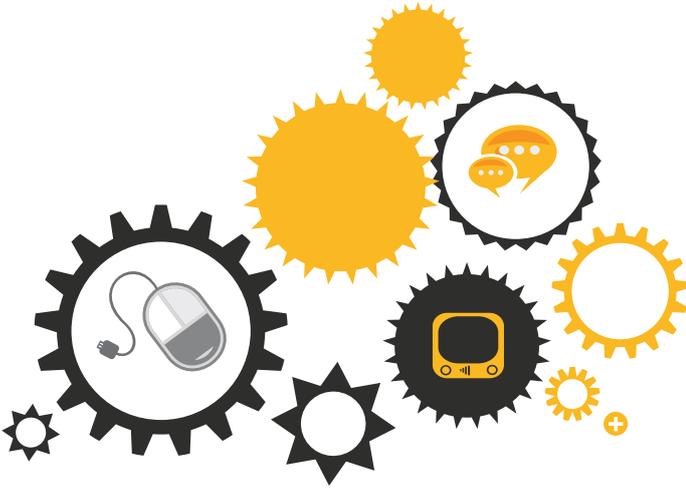


Figure 12: What people use the Internet for – tools for online creative expression

## 2

## Attitudes towards the Internet



In this part of our report we look at online user attitudes to the Internet.

Like other aspects of our study, this is an area where the volume of similar research at a MENA level is scant; although we note that the Dubai School of Government recently explored attitudes towards technology in the classroom in their latest Social Media Report,<sup>30</sup> whilst Northwestern University in Qatar examined attitudes towards media usage in a 2013 study.<sup>31</sup> That said, an exploration of general attitudes towards the Internet – as covered by this section – is an aspect we have not seen covered elsewhere.

This contrasts starkly with some other regions where a number of programs allow for the tracking and evolution of Internet attitudes over time.

The Pew Research Center's Internet & American Life Project, for example, produces regular reports "exploring the impact of the Internet on families, communities, work and home, daily life, education, health care, and civic and political life."<sup>32</sup>

Similarly, Ofcom – the UK Communications Regulator – undertakes regular research work "to understand UK adults usage habits and attitudes across TV, radio, Internet, mobile phones and games"<sup>33</sup> and map changes that occur over time.

This report offers us the opportunity to begin building a similar program and evidence base in the Middle East.

### Summary

- MENA Internet users are much more likely to agree with the statement "the Internet is making things better for people like me" – compared to the world average.
- Older online users (those aged 55+), particularly those with lower levels of Internet experience and online skills, tend to have the most negative views about the benefits of the Internet.
- There is also a strong correlation between negative views of the Internet and educational qualifications; as well as the amount of time people spend online each week.
- MENA Internet users are often quite polarized in their attitudes towards the Internet. Whilst many of them view the web as a safe place to express opinions, a significant number of them also take the opposite view.
- MENA Internet users are more supportive of Government authorities blocking online content such as pornography - or material that is 'discriminatory' or 'racist' - than in other regions.
- They are also much more inclined to argue that these bodies should censor Internet content to protect children, with the MENA average sitting 12% higher than the combined world dataset on this subject.

## a. Attitudes towards the benefits of the Internet

In this first instance we asked respondents for their overall attitude towards the Internet and whether it played a beneficial role in their lives (see Figure 13).

Not surprisingly, given that our report derives from an online survey of existing Internet users, respondents were strongly inclined to agree with the statement that “the Internet is making things better for people like me.”

In MENA nearly half of respondents (49%) scored this question with a seven – the highest number which could be recorded for this statement.

The difference in this view between Internet users in North Africa and the GCC was negligible (49% versus 48%).

Less negligible however is the discrepancy between the enthusiasm for the Internet shown by MENA respondents and the world average. The ten percentage points between these figures is quite substantial (49% versus 39%) and may reflect the value MENA Internet users

attribute to some of the functionality we saw in Section 2.

Opportunities to watch videos online, meet new people and check the news are all popular Internet activities in the Middle East; and experiences which are not necessarily replicable offline in the same way. This may help to explain the overwhelmingly positive view of the Internet shown by Middle Eastern users.

At the same time, it is also noticeable that MENA Internet users are marginally more likely to say that they “totally disagree” with the view that “the Internet is making things better for people like me” than other regions (globally Internet users are bunched much more in the middle of these statements).

To explore the potential rationale for these attitudes we broke down further the response of those who were least enthusiastic about the benefits of the Internet (see Figure 14).

This showed no real difference in attitudes across the genders, but it did show that those with a more negative view of the Internet

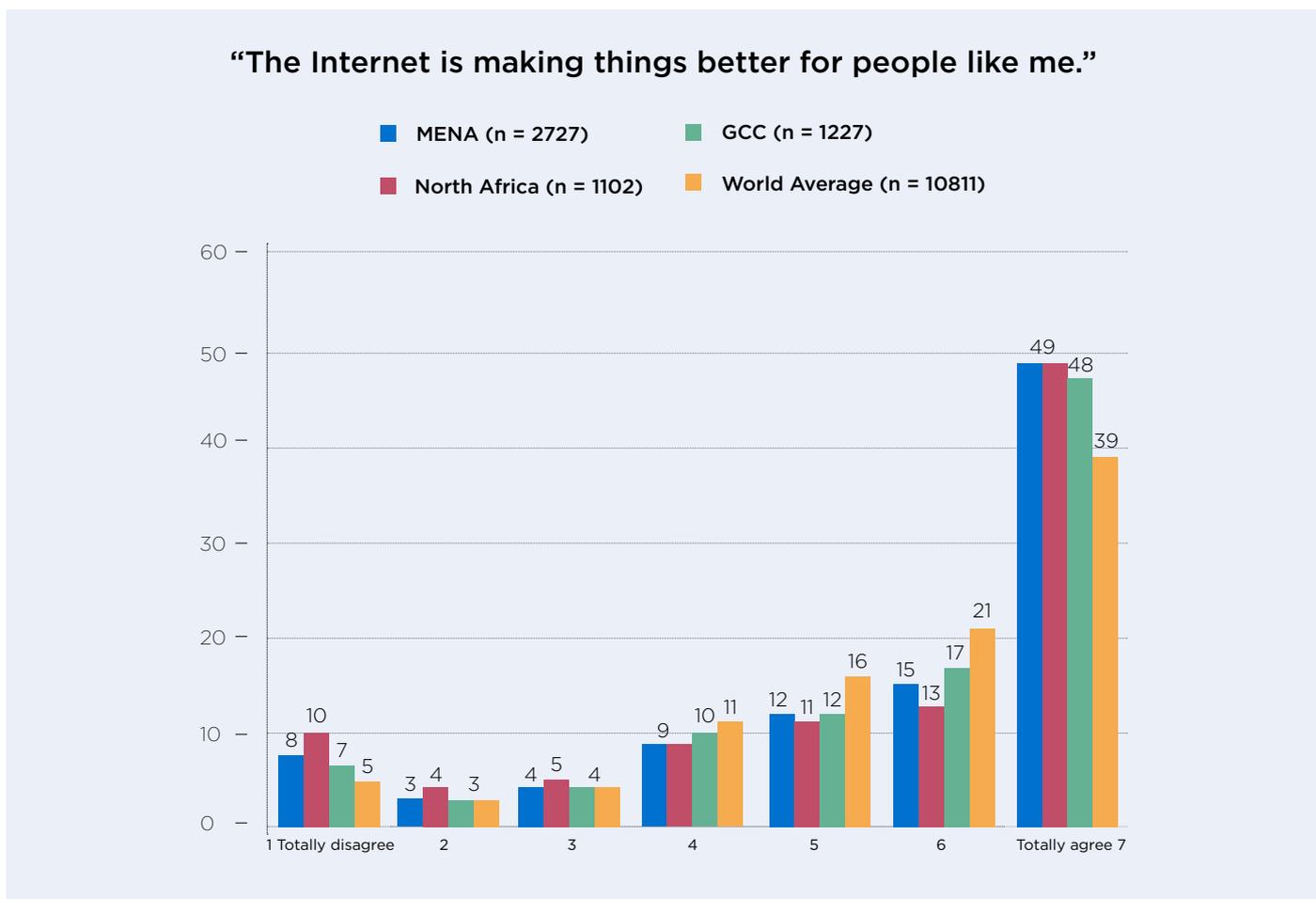


Figure 13: “The Internet is making things better for people like me.”

tend to be older (30% are aged 55+) and are relatively new to the Internet, with 32% having used the web for under a year, and 26% for less than 6 months.

Similarly, negative attitudes towards the benefit of the Internet are also higher amongst those who rate their online skills as “poor” and who spent little time online – with 13% being online for less than 5 hours a week.

In addition, there seems to be a strong correlation with respondent’s level of education.

This hints that better general education and awareness of the

Internet can foster more positive attitudes towards Internet adoption, especially when coupled with more time spent online and users increasing their confidence in their online skills.

There also appears to be a correlation between age and attitudes towards Internet adoption, with older people more likely to hold negative views about the impact of Internet on their lives. This is especially true for the 65+ age group.

These conclusions are perhaps not altogether surprising. The Internet is very much an experiential medium; and as a result low levels of experience, skills and time spent online are unlikely to change perceptions of the value of the Internet.

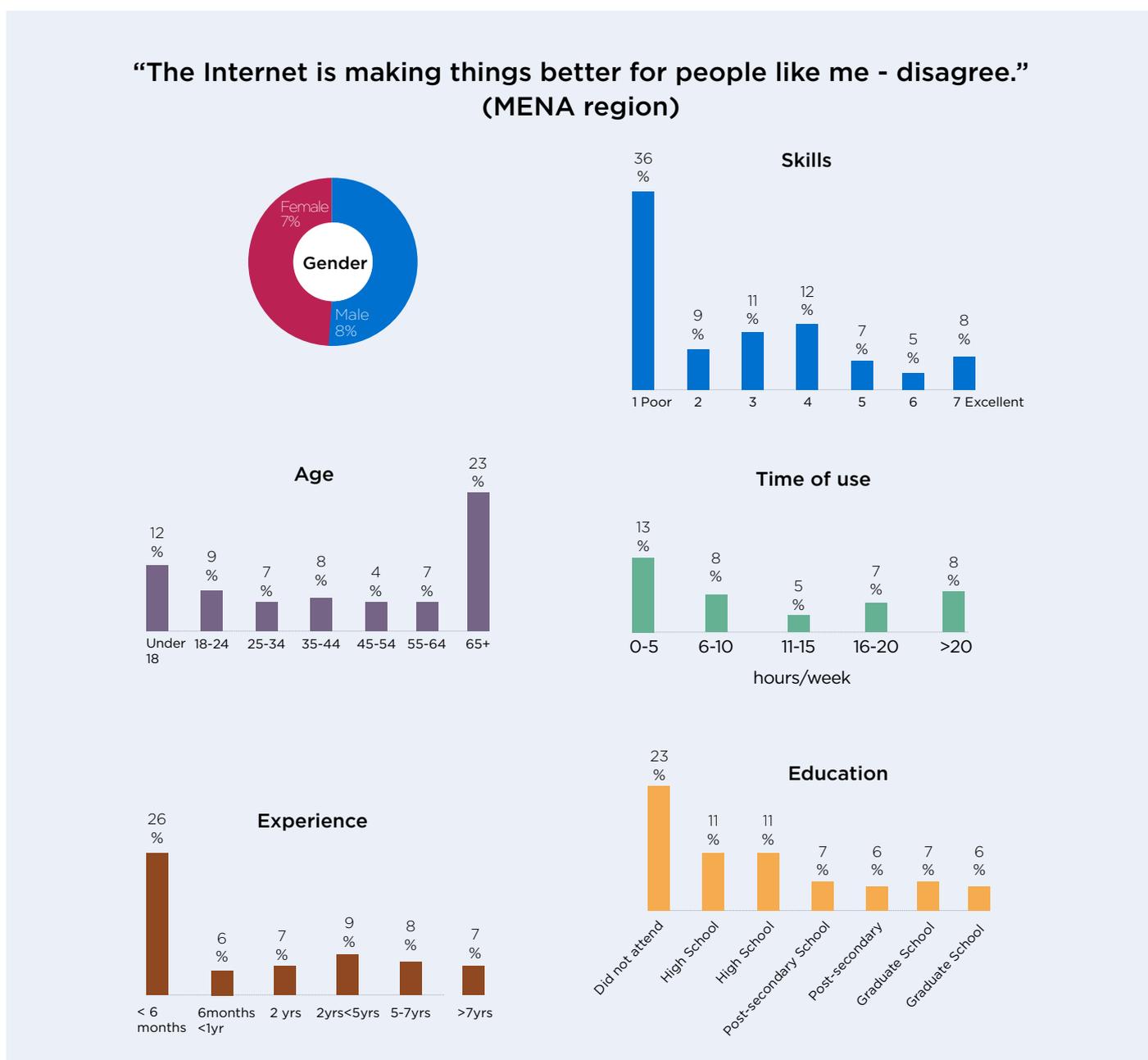


Figure 14: Users who disagree with the statement “the Internet is making things better for people like me.”

This data suggests there may be a value in focusing efforts to work with new netizens to ensure they have the skills, time and confidence they need to become proficient online users.

Testing attitudes in the early stages – and then following interventions such as training programs or proxy usage (where online activity is undertaken by someone else such as a family member) – would provide a valuable evidence base to test the effectiveness of this support in changing perceptions and attitudes towards the Internet. This is *not* a hypothesis that we are able to explore with this dataset, but it may be an area that is worthy of further investigation.

### b. Attitudes towards being safe online

We asked respondents if they felt safe to express opinions online (see Figure 15) as well as whether there were times when people should be able to be anonymous online (see Figure 16).

These questions are of particular interest given the political changes which have taken place in parts of the region over the past couple of years, and the frequency with which MENA Internet users express opinions online about politics (see Section 2g).

In addressing these questions about feeling safe online, MENA Internet users tend to be more polarized in their attitudes compared to the world average.

For example, 22% of Internet users in North Africa totally agreed (see Figure 15) with the statement that “the Internet is a safe place to express my opinions.” This figure sits comfortably above the global average of 15% and higher than the GCC average of 17%.

By the same token, MENA Internet users in both North Africa and the GCC are also slightly more inclined to take the opposing view – compared to the world average - namely that the Internet is not a safe place to express opinions online.

It would be interesting to map these differences by country as well as other variables such as age and Internet experience, to see if such variables can account for these dissimilarities. This segmentation may form part of any further analysis of our data.

We also saw a similar polarization when we explored the right of people to be anonymous online (see Figure 16).

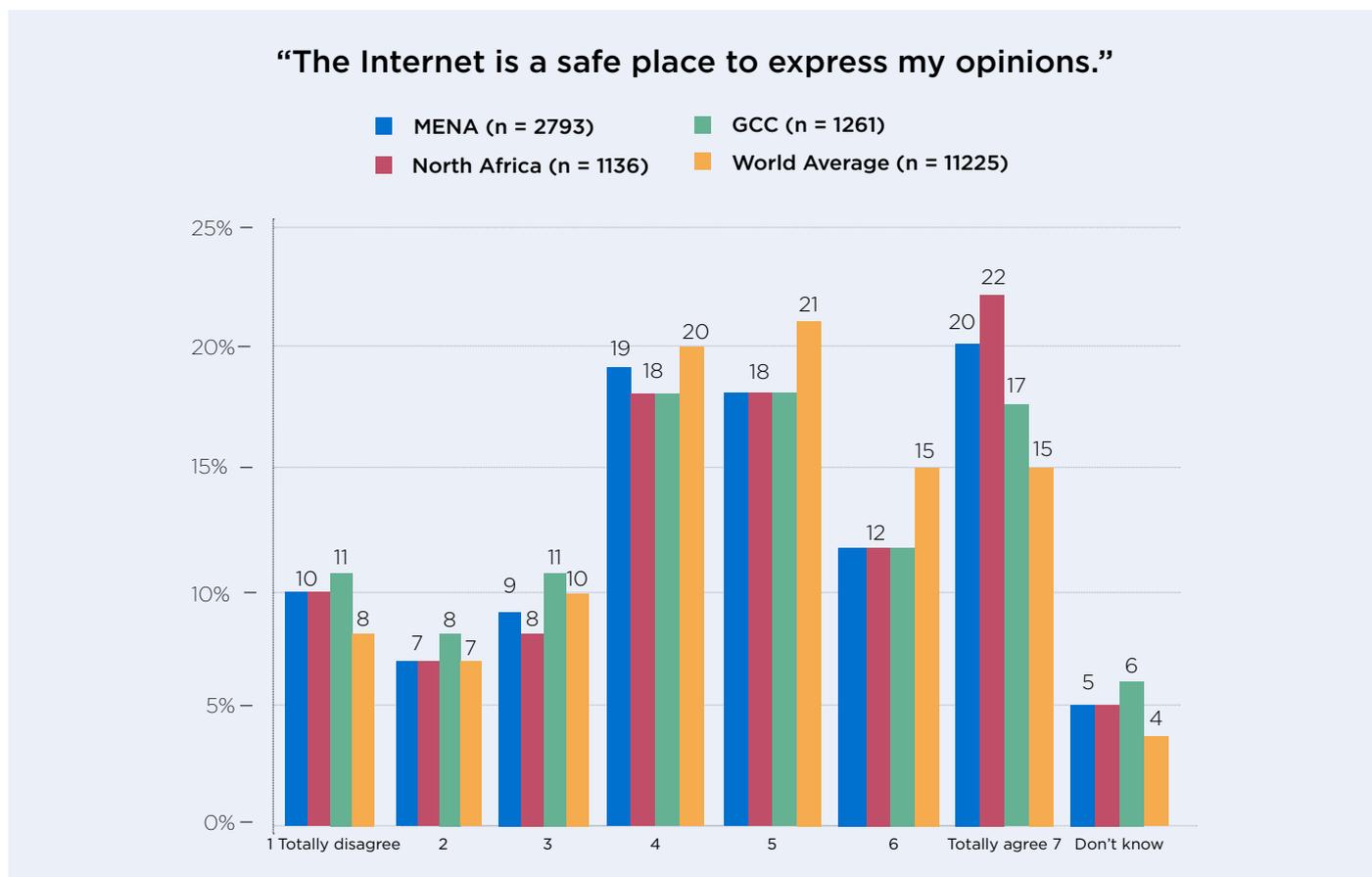


Figure 15: Is the Internet a safe place to express opinions?

When addressing this question MENA Internet users were more inclined – but only by 3% - to “totally agree” to the right to occasional anonymity online; and again we saw that North African Internet users were slightly more supportive of this principle than their GCC counterparts; with GCC Internet users more in step with the global view.

However North African Internet users were also the group who disagreed the most with this idea, in this instance 15% of North Africa based respondents totally disagreed with the right to intermittent online anonymity. This is compared to a world average of 10% and a GCC average of 12%.

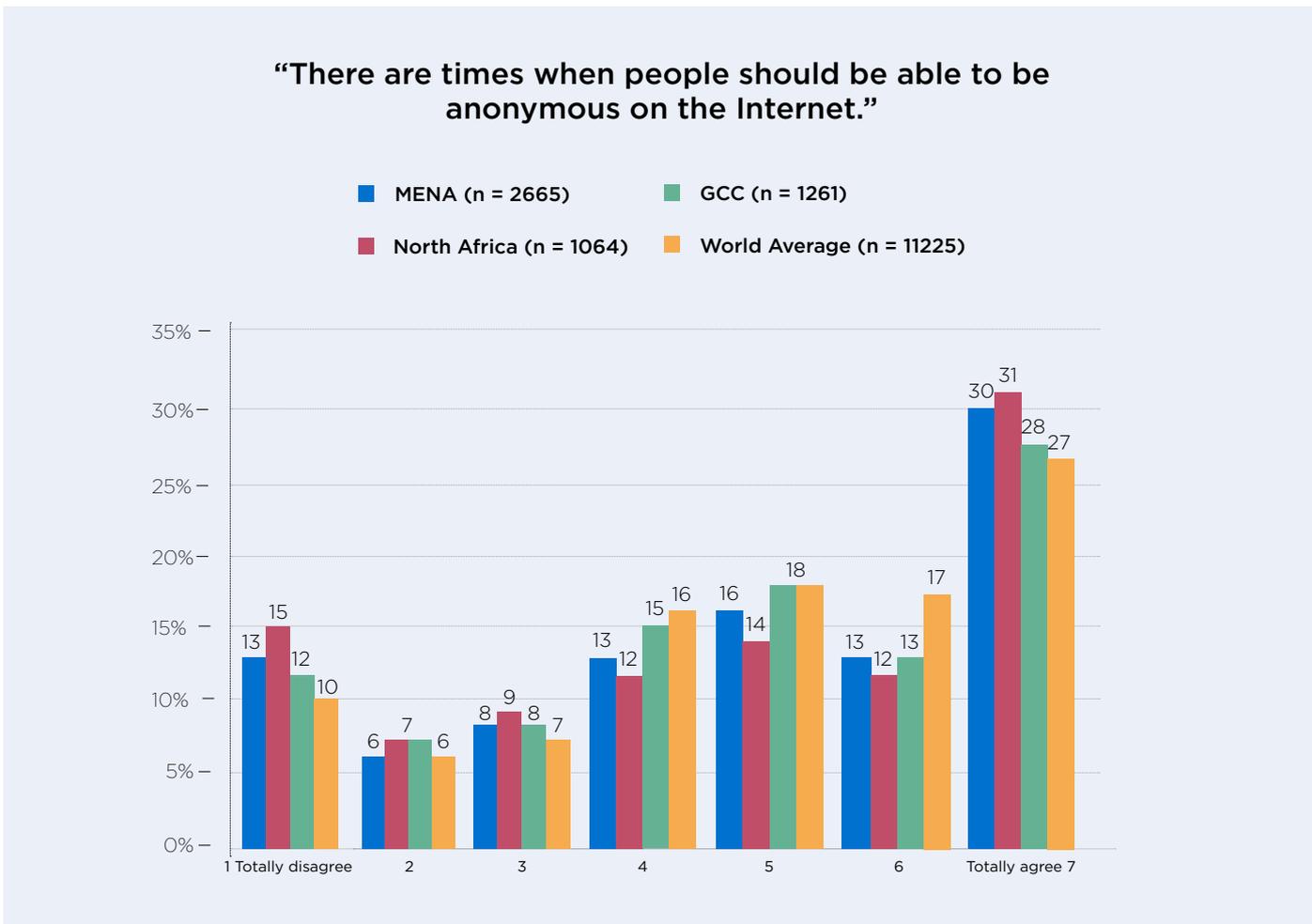


Figure 16: Attitudes towards anonymity online

### c. Attitudes towards the role of Government authorities

Alongside more general questions about the benefits of the Internet and the rights of Internet users to freedom of expression and anonymity, we asked respondents about their attitudes towards Government authorities and their role in managing “harmful” content such as pornography, racism and censoring material in order to protect children.

This was one area where MENA Internet users had overwhelmingly different attitudes from their global counterparts (Figures 17-19).

People in the Middle East overwhelmingly expressed the view that they want Government authorities to protect them from content which is inappropriate and threatens cultural values.

When it comes to censoring online content in order to protect children, 59% of MENA respondents “totally agree” with the view that this is a role Government bodies should undertake (see Figure 17).

GCC and North Africa Internet users were unified in this view, and although 47% of global respondents shared this opinion, the world average was 12% behind the MENA figure.

One reason for this difference may be the more prominent role being played (or proposed) by content filters<sup>34</sup> and the level of effort being invested into children’s media literacy<sup>35</sup> in some regions. Combined, technical mechanisms and self-regulation can be used to play a role in protecting children from harmful online content.

MENA Internet users are also very clear in their view about the role of Government authorities in censoring content that is ‘discriminatory’ or ‘racist’ (see Figure 18). Again online audiences in MENA are strongly in favour of this being the responsibility of Governments.

Across the region, 41% of Internet users “totally agree” with the view that this is the role of Government authorities – compared to a world average of 33%.

Respondents in North Africa are even more inclined to agree with this view, with 43% of those answering our survey expressing this opinion, compared to 38% in the GCC. The North Africa figure – which is 10% above the global aggregate – demonstrates how strongly this opinion is felt.

Finally, in addressing access to – and distribution of – pornography, MENA Internet users again expressed attitudes which were much more in favour of Government bodies blocking of this content than the world average (see Figure 19).

Across the MENA region, 58% of respondents were inclined to “totally agree” with the view that “Government authorities should block distribution of pornography” – compared to a global figure of 44% of respondents.

The 14% difference between the aggregated figure from MENA and the world average once again makes clear the strong attitudes of MENA Internet users to this important question.

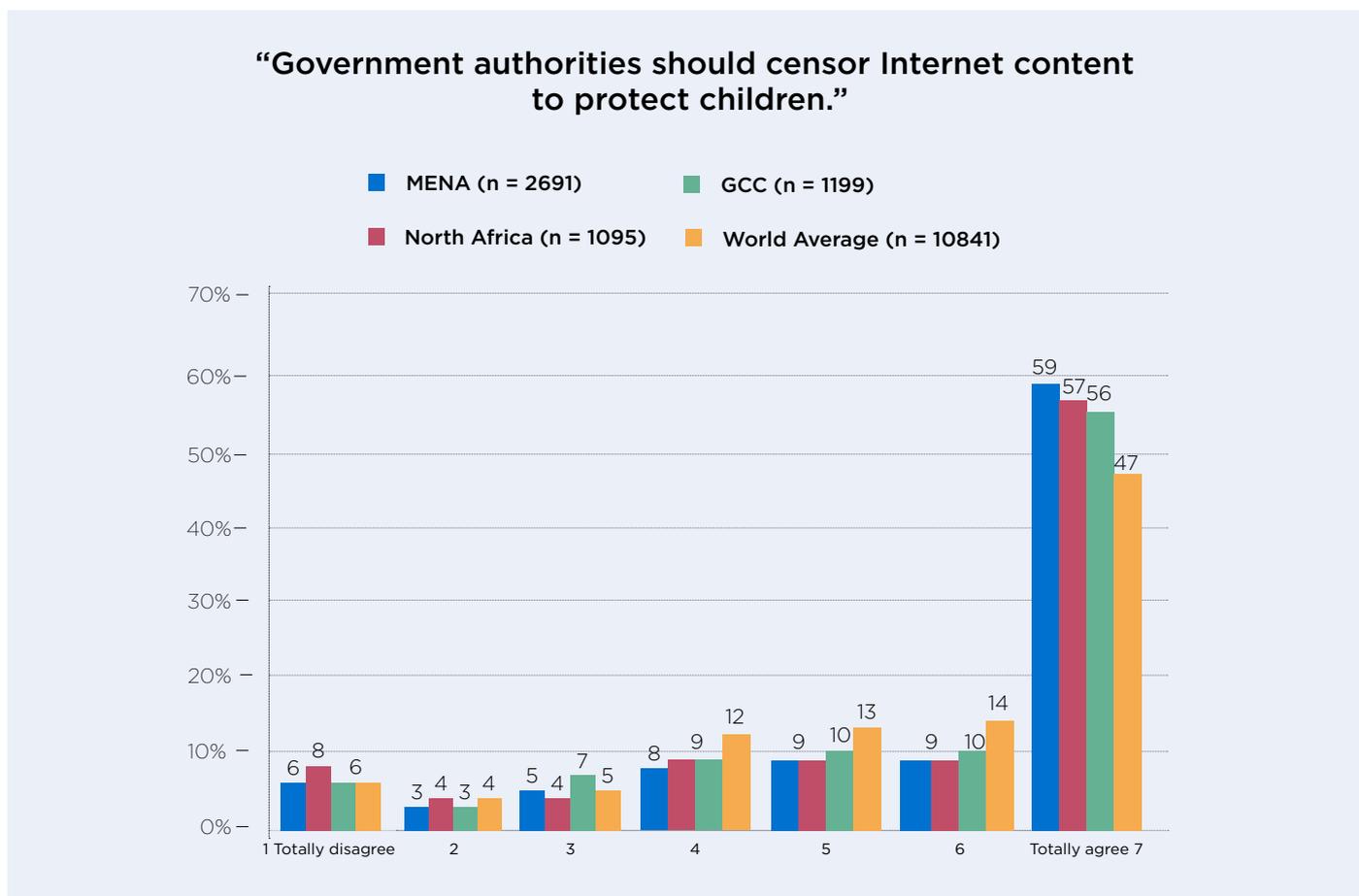


Figure 17: Role of Government authorities — censoring content to protect children

### “Government authorities should censor content that is ‘discriminatory’ or ‘racist.’”

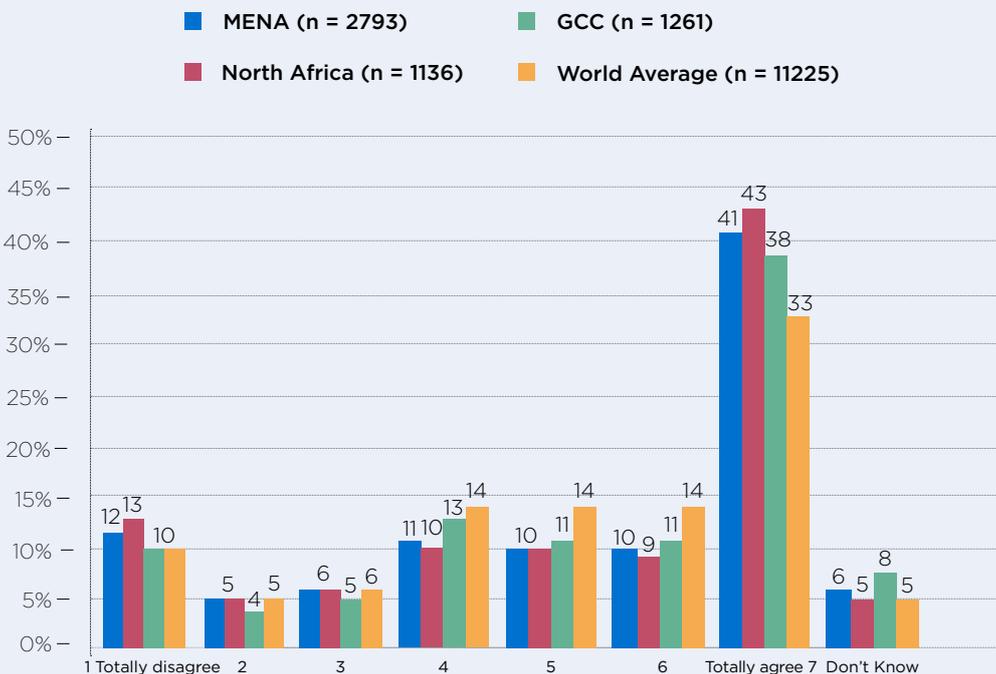


Figure 18: Role of Government authorities – censoring discriminatory and racist content

### “Government authorities should block the distribution of pornography.”

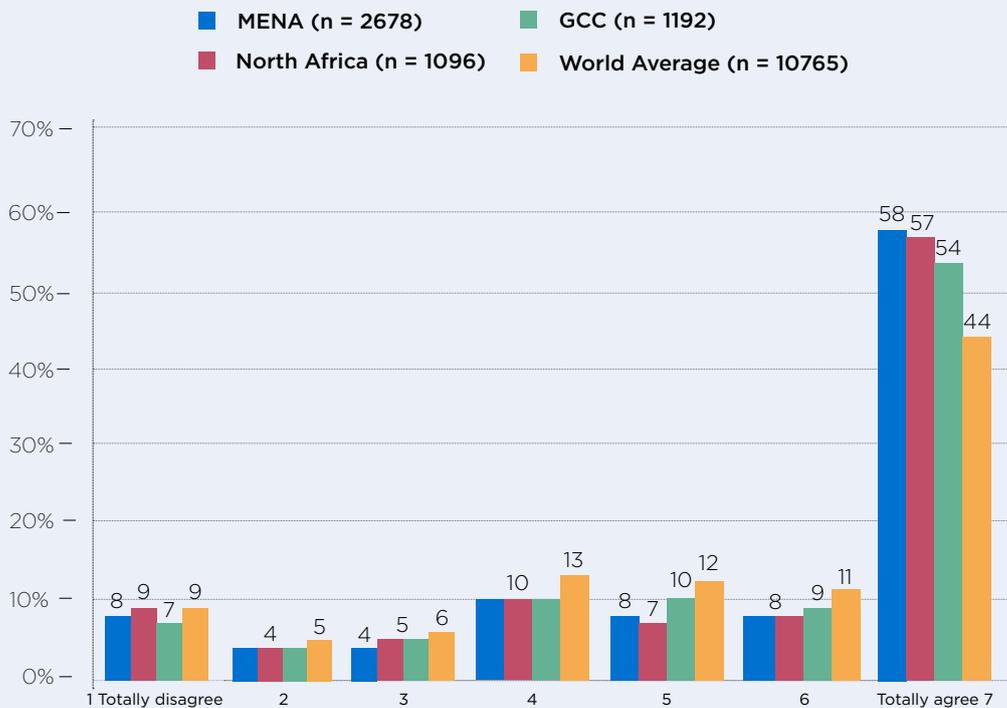


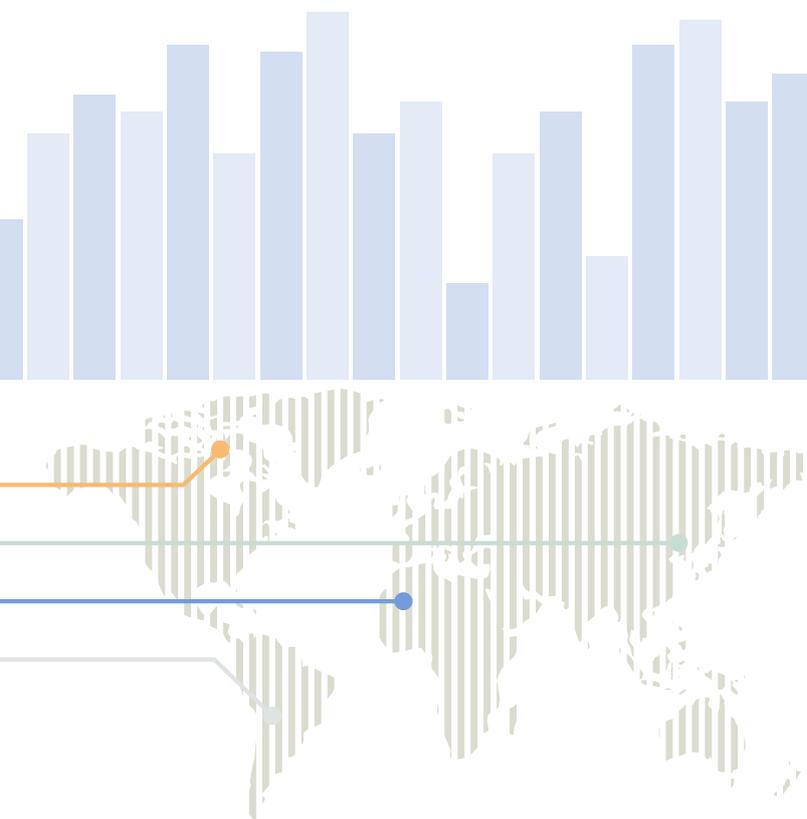
Figure 19: Role of Government authorities — blocking pornography

## 3

## Levels of Concern

This chapter explores the levels of concern expressed by Internet users to issues such as the safety of their email, information they have provided in one context being used for another, and the risk of their reputation being damaged by what people say about them online.

As we saw in Section 2, where we explored the attitudes towards the Internet shown by MENA Internet users, opinions across the region are often highly polarized; and often more so than global average.



## Summary

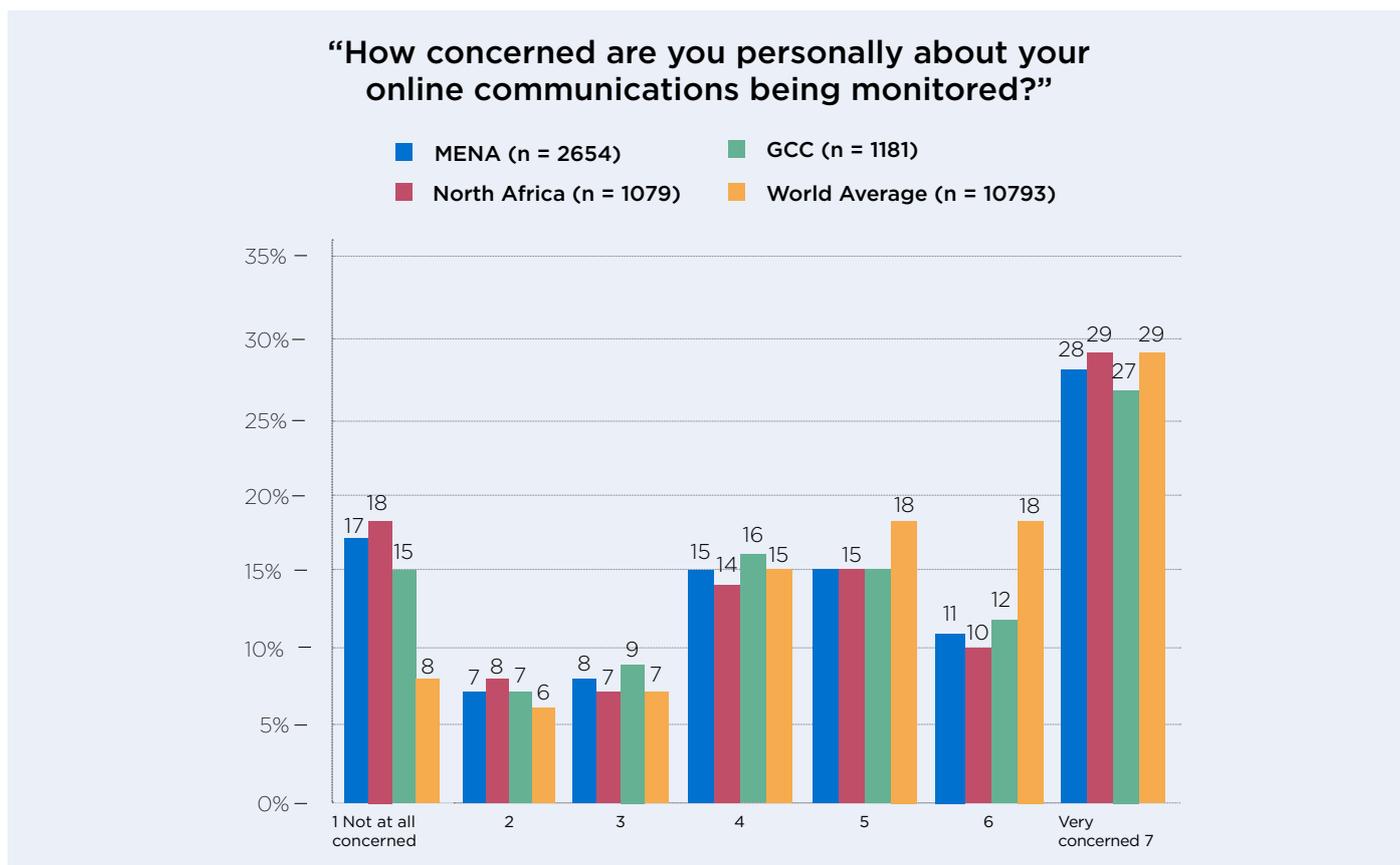
- MENA Internet users enjoy similar levels of concern around their online communications being monitored in comparison to their global counterparts (28% versus 29%).
- However a sizeable sample – 32% of MENA respondents, compared to 21% as the global average – is also much more relaxed about this issue. They rated their concern at the lowest end of this spectrum (scoring this 1-3).
- MENA Internet users have similar levels of concern related to their email or online accounts being hacked. But 10% remain “not at all concerned”.
- Some MENA users are also considerably less likely to be concerned than their global counterparts about data they have provided online being used for a different purpose than it was provided for (12% versus 6%).
- Broadly speaking MENA’s online population is less concerned about damage to their reputation as a result of what someone posts online. Nonetheless, a third of North Africa based respondents took a different view and said they were “very concerned”. This figure is above the global average and perhaps reflects the political climate at the time in which this survey was conducted.

## a. Concerns about monitoring and the collection of personal data

In addressing concerns around their online content being monitored, over a quarter of MENA Internet users reported that they were “very concerned”.

Their response, which was almost identical across the GCC and North Africa, also mirrored the level of concern being expressed at a global level, where 29% of respondents expressed the view that they were “very concerned” about their online communication being monitored.

At the other end of the scale however, a significant number of MENA Internet users took the view that they were “not at all concerned” about such monitoring. Across the region 17% of respondents held this view, significantly more than the world average of 8% (see Figure 20).



**Figure 20: Concerns around monitoring of online communication**

Given that our survey took place before the publication of top-secret documents by NSA whistle-blower Edward Snowden (which revealed details about mass surveillance of electronic communications by the American Government) it will be interesting to see if these levels of concern have risen as a result of these revelations.<sup>36</sup>

We also asked respondents to comment on the view that: “there is personal information about me that is collected on the Internet by people I do not know” (see Figure 21).

Very similar numbers of people in MENA (18%) “totally disagreed” with this statement; broadly in line with the numbers who expressed that they were “not at all concerned” about their online communication being monitored. It’s likely that many of these are the same respondents, although we would need to cross-reference

these responses (which we might do in the next iteration of this study,) in order to verify this assumption.

Looking at the global picture, there is a rising level of concern about this sort of data collection, which is significantly greater than the level of concern shown in MENA. The world average for those who scored this concern 5-7 (with 7 being the highest level which can be attributed) was 48%; whereas the MENA figure for this question was 37%.

Interestingly at both a world and MENA level there is a sizeable online population (10% globally and 12% in MENA) who answered “Don’t Know” to this question, reflecting the need for digital literacy efforts in this space.

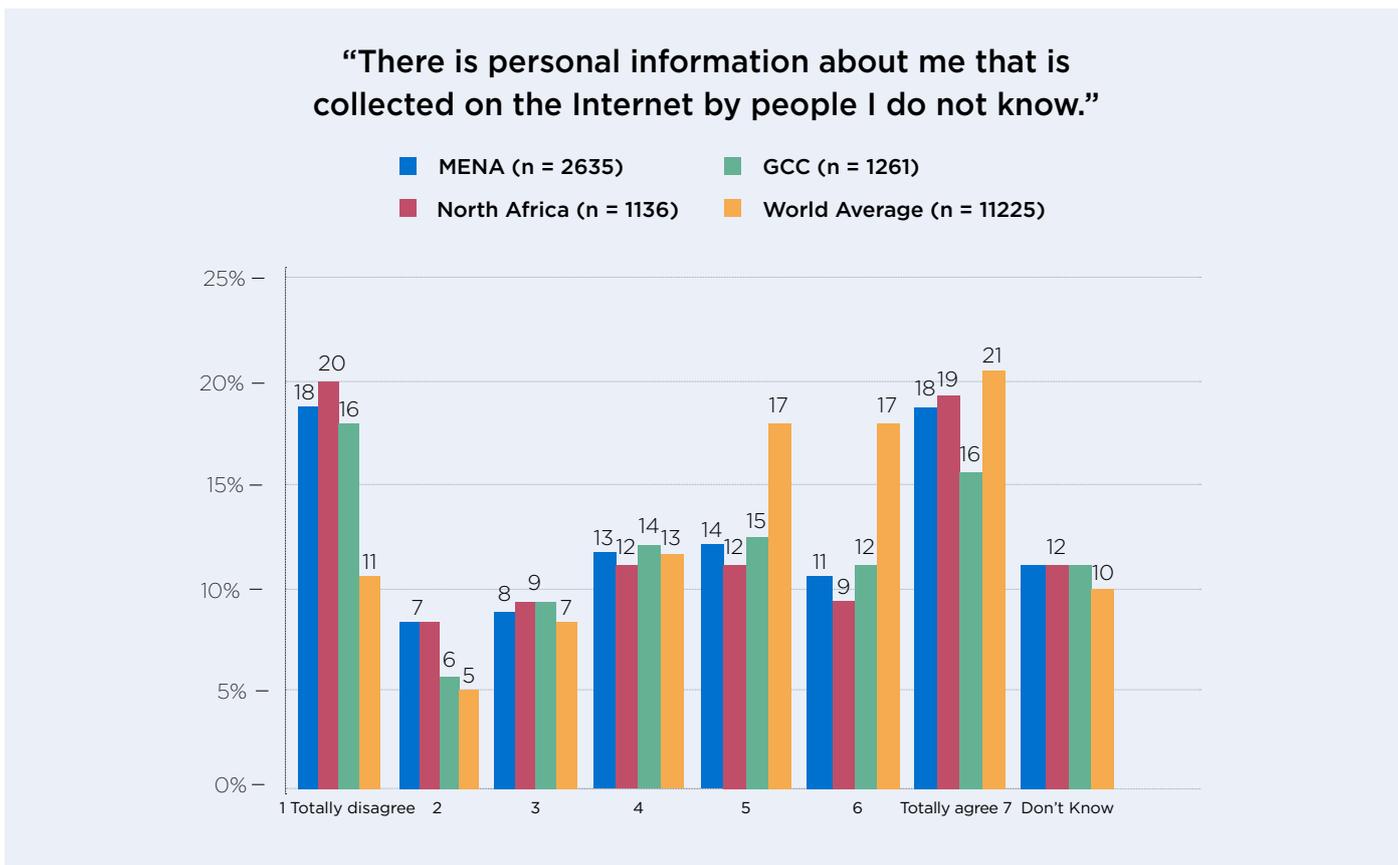


Figure 21: Concerns about personal information being collected by others

### b. Concerns around the repurposing of personal data

Once again this is another area where MENA Internet users are quite polarized, although on this occasion MENA respondents are less concerned about this issue than Internet users in other parts of the world (see Figure 22).

Globally, 30% of respondents stated that they were “very concerned” about information they have provided for one purpose being used for another. With nearly a third of all respondents expressing the highest level of concern, this is clearly a source of contention for Internet users.

In MENA however, this concern is less pronounced, particularly amongst Internet users in the GCC, who are 5% behind the global average. Users in North Africa were much more aligned with this world figure (29% versus 30%).

Amongst respondents who were “not at all concerned” or expressed similarly low levels of concern (by grading their concern between 1-3 on a 7 point scale) MENA Internet users seem much more relaxed about this issue than their worldwide equivalents.

A quarter (25%) of MENA respondents scored their concern 1-3, compared to a world average of 16%. This may reflect the state of markets such as e-Commerce in the region, or a lack of understanding about how data can be manipulated; with data from social networks for example being used by online marketers – or sold on to other interested parties.<sup>37</sup>

These concerns are not unique to the online world. We note, for example, that in a non-online setting there are concerns in Qatar about SMS spam<sup>38</sup> and of phone numbers being used for different purposes, or purposes which the user does not feel that they have consented to. These SMS based concerns (aligned in many cases with actions to combat and address email spam) are global.<sup>39</sup>

As MENA Internet users broaden the breadth and depth of their Internet experience it is possible that we will see these levels of concern rising, and so there will be pressure on Internet actors, Government authorities and individuals to address the concerns of users accordingly.

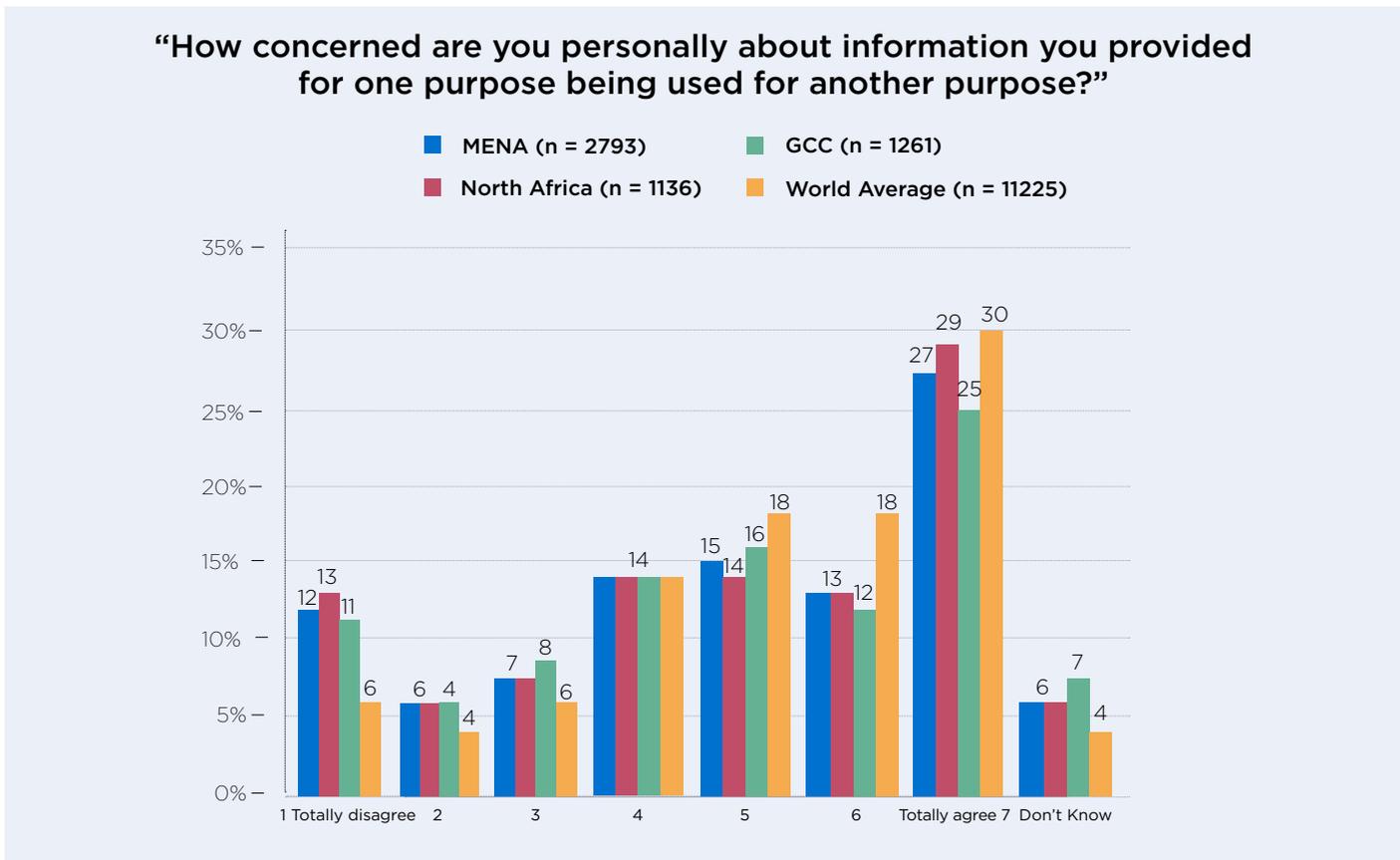


Figure 22: Concerns around personal data being repurposed

### c. Concerns about the safety of online accounts

Once again we see that the concerns of many MENA Internet users related to their email or other Internet accounts being hacked into are broadly in line with the concerns of their global peers (see Figure 23).

In this instance, the percentage of respondents across the world who expressed the view that they are “very concerned” about this stood at 41%. In MENA the figure was only fractionally higher at 44%.

Conversely, MENA Internet users are marginally more likely to state that they are “not at all concerned” with this issue. 11% of Internet users in North Africa expressed the lowest level of concern – some 5% above the global figure.

### d. Concerns about being misled online

When it comes to being misled by information they find on the Internet, respondents in North Africa were more concerned about this than online users in the GCC (27% versus 22%). But as a region, amongst Internet users who are “very concerned” about this issue, the levels of concern being expressed were broadly in keeping with the global average (see Figure 24).

Where we do see a small difference however is in those who stated that they are “not at all concerned,” with MENA internet users – across both the GCC and North Africa – more inclined to agree with this statement than others around the globe.

### “How concerned are you personally about someone breaking into your Internet account or email?”

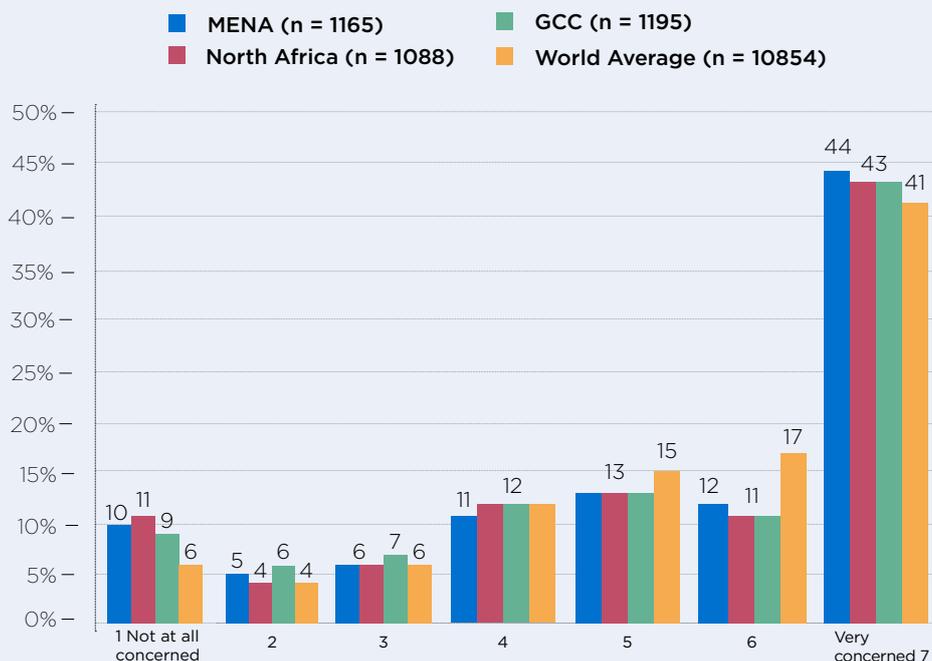


Figure 23: Concerns about Internet accounts and email being broken into

### “How concerned are you about being misled by information posted on the Internet?”

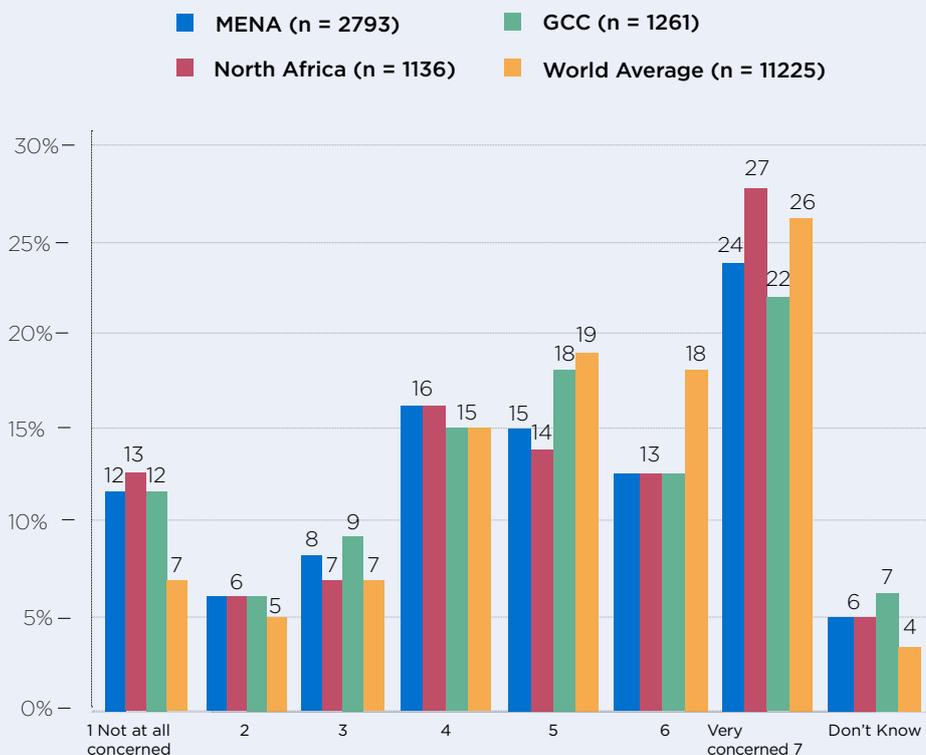


Figure 24: Concern about being misled by false information

## e. Online reputation and reputation management

This is an area where MENA Internet users are amongst the most - and the least - concerned of our global sample.

As a result, it would be interesting to examine these differences in more detail, perhaps mapped against years of Internet experience and the confidence and skills of users. Those who are more confident online may be less concerned about issues related to their online reputation, as they may be more adept at managing this themselves. This is an area to potentially explore further in future studies.

For now however, we will have to confine our conclusions to the top-line data around this question (see Figure 25).

A substantive number of MENA Internet users (14%) expressed the view that they are “not at all” concerned about their reputation being damaged by what someone posts online.

When expanded to include the lowest three levels of concern (1-3 on the scale) then 30% of MENA Internet users share this view. This is compared to a world average of 23%.

That said, at the other end of the scale there are a significant number of MENA respondents who stated that they were “very concerned” about their reputation being damaged by what someone posts online. This is particularly true amongst our North African sample, who expressed this concern more than other region.

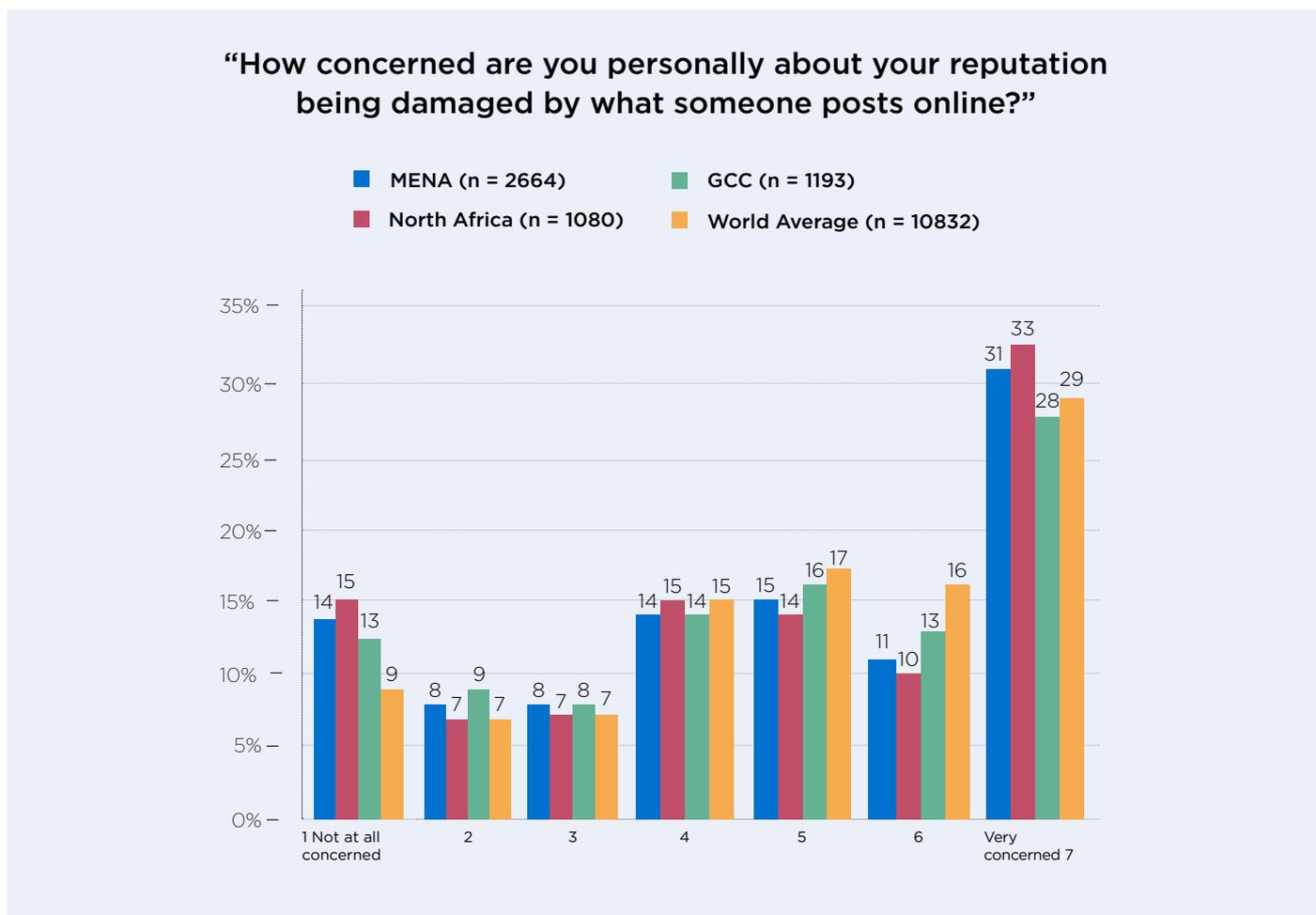
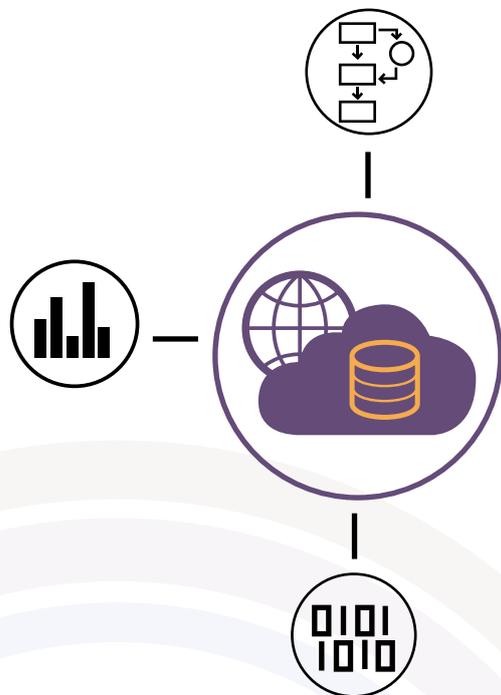


Figure 25 : Level of concern related to personal reputation

## 4

## Trust



This section of our report looks at the relationship between Internet users and various online players such as businesses, Government authorities and search engine providers. It also examines attitudes of online users towards the data they post online – and how safe they think it is.

These findings are valuable because they offer some interesting insights into the role that different online actors can play in promoting an active, healthy and safe Internet economy.

### Summary

- Internet users in North Africa are much more inclined to believe that their personal data is safe online compared with Internet users in both the GCC and globally.
- MENA Internet users are often quite polarized in their attitudes towards sharing identifiable and highly personal information online such as their name, address and date of birth. At both ends of the spectrum MENA audiences recorded their levels of trust as either significantly higher – or lower – than the global average.
- The reuse of their public data is not something MENA Internet users are comfortable with. They are much more strongly against this than our global sample.
- Banks and financial institutions enjoy high levels of trust in the region, followed by health and medical service providers and Government authorities.
- Trust levels for predominantly digital service providers – such as social networks, search engines and online content providers – are lower than the more traditional, predominantly offline, bodies that we also asked respondents to assess.

## a. Attitudes towards personal data online

When examining attitudes to personal data (see Figures 26-28), MENA Internet users reflect different opinions to the wider Internet population.

Taken in aggregate, MENA Internet users, for example, are much more likely to “totally agree” with the statement that the personal data they put online is kept safe (see Figure 26). Mapped against a world average of 13% of respondents, MENA’s 19% is significantly higher.

However, this aggregated figure overlooks the extent of the variance in the region to this question.

Amongst online users in North Africa, 22% of respondents held this view, compared to 15% of people in the GCC. The GCC’s figure is much more aligned with the global average.

On the other hand, a small number of GCC users are also more concerned about this issue too; with 14% totally disagreeing with the view that their data was safe online, compared to 12% in North Africa and 11% globally.

Building on this question we also asked a specific control question which observed whether users feel safe sharing highly personal information online such as their name, birthdate or phone number (see Figure 27).

Although smaller numbers replied by saying that they felt totally safe sharing this information online, the number of people expressing this sentiment in MENA was higher than the world average, although again this figure is skewed to some extent by the attitudes of North African respondents. 17% of the 1,090 respondents from North Africa communicated that they were as comfortable doing this as our scale permitted (by clicking “Totally Agree”).

In the GCC the views of Internet users – where 11% voted for this option – were akin to the world average of 12%. However, nearly a quarter of GCC Internet users – and one in five in North Africa - also totally disagreed with this view; indicating that they do not feel safe sharing this sort of personal information online. This shows again how attitudes of online users in the Middle East are often more polarized than other regions on a number of these questions.

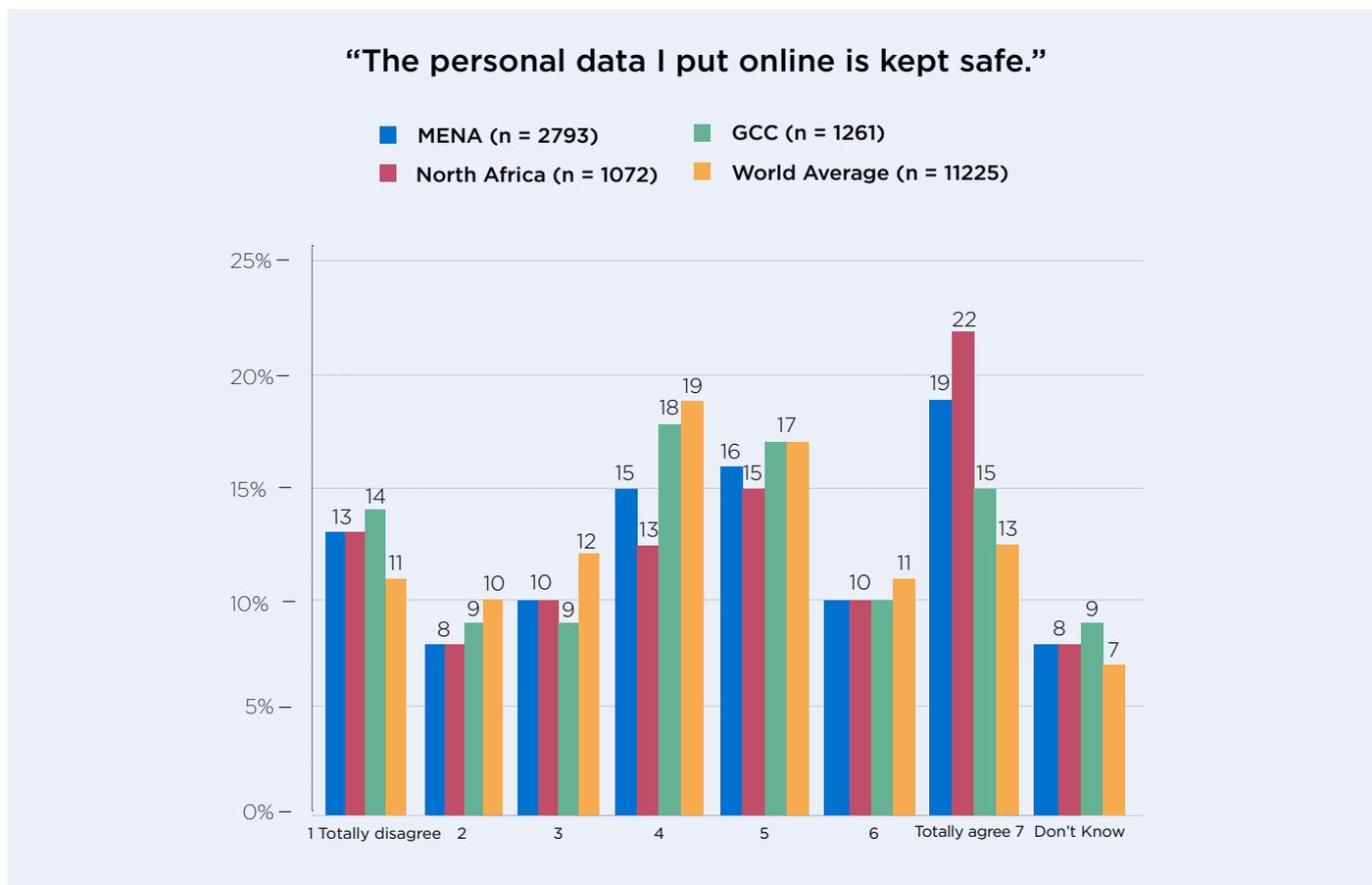


Figure 26: Attitudes towards the safety of personal data online

### “I feel safe providing some personal information such as my name, birth date, or phone number on the Internet.”

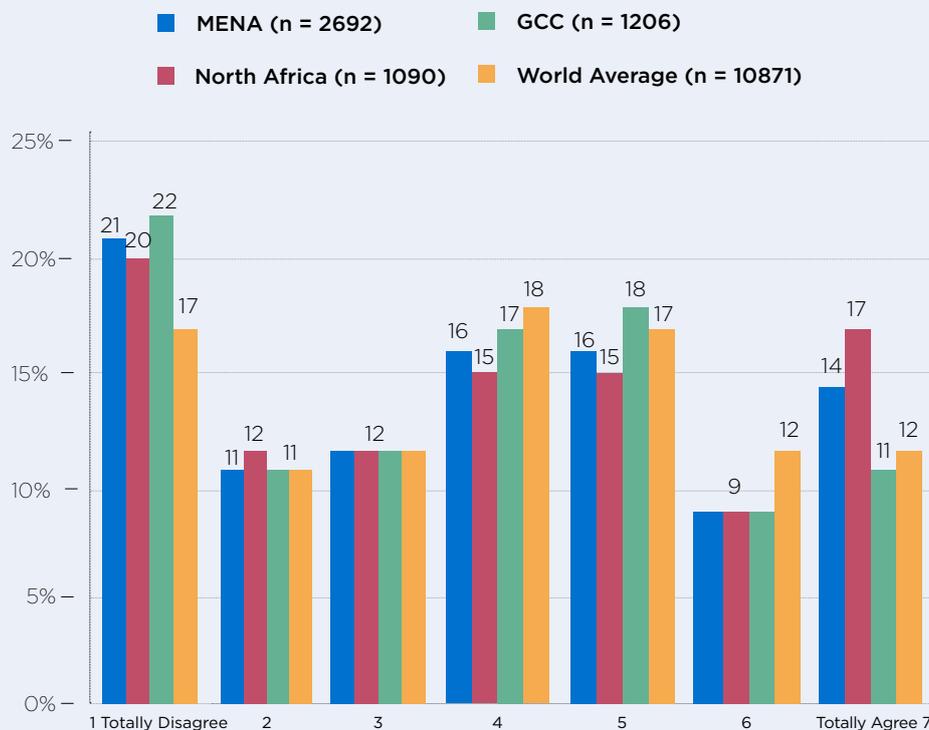


Figure 27: Attitudes towards sharing identifiable data online

### b. Trust in what happens to data that is placed in the public domain

Following on from the question around online data and information being repurposed (which we addressed in Section 3b, see Figure 22) we also asked if information is being made public then “it is okay for anyone to use that data” (see Figure 28).

These questions are similar, but contain an important difference, in that this second question explores a tacit consent to public data being repurposed. In contrast, our earlier question had the implication of data (which could be both private and/or public) being reused without consent and an awareness that this was happening.

Either way, inside MENA, our respondents were overwhelmingly against public data being repurposed. 41% of online consumers

in the Middle East “totally disagreed” with this concept. This view is substantially divergent from global aggregates where only 27% felt as strongly.

Within MENA, North African users once again felt more strongly about this issue than their GCC equivalents – between the two parts of the region we saw a 7% variance on this question.

Of those who were more comfortable with this concept, we found that 18% of our survey users in MENA totally agreed with this option, in tune with the world average of 17%. This suggests that a significant number of MENA Internet users have a view in step with other global Internet users, although a significant percentage does not.

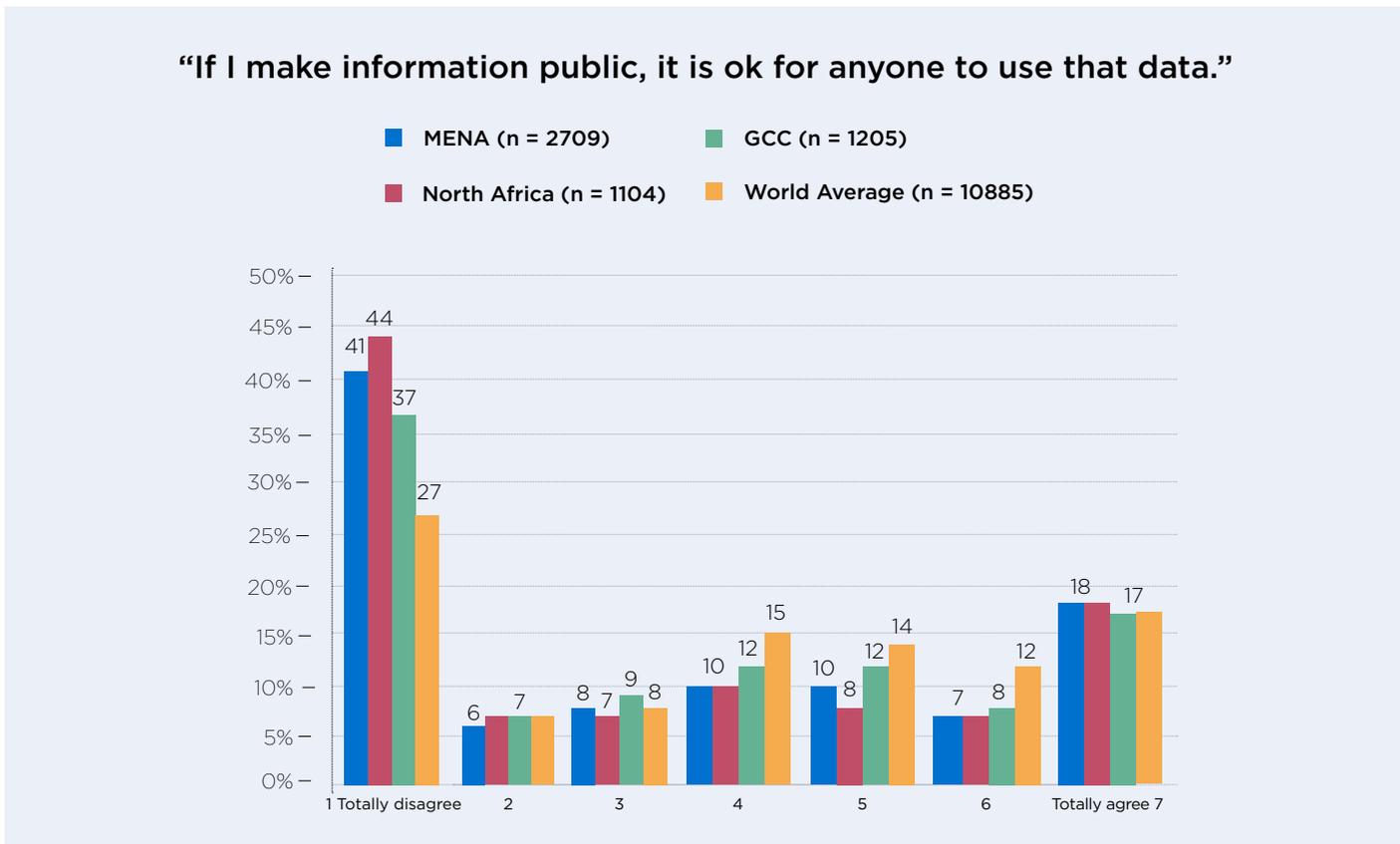


Figure 28: Attitudes towards sharing identifiable data online

### c. Trust in different online players

Attitudes of online users to the data they post and share online are, in part, influenced by their views of different Internet online players – the businesses and institutions which all play a role in the Internet ecosystem.

We asked audiences to rate the levels of trust that they had in these different entities. Looking at ISPs, the mean score for MENA was broadly in line with other regions, with ISPs in Africa and Asia being viewed slightly more favourably (see Figure 29).

Trust scores were marginally higher than ISPs for both mobile phone operators and telephone companies, with trust levels in these online players in MENA and Asia the highest of any region.

In the same way, when we studied responses to trust in businesses, and offline service providers – such as banks and financial institutions as well as healthcare providers and Government, trust levels in MENA were generally in the top percentile when mapped against other regions.

Although, that said, it is noteworthy that trust levels in MENA for shops and department stores were considerably lower than for other online players in this category, and that MENA’s trust in

this group of online players was amongst the lowest in the world. This may be one contributing factor to the relatively low levels of e-Commerce in the region (see Figure 30).

The flip side to this is that banks and financial institutions in the region enjoy high levels of trust. Across MENA these bodies scored the highest (4.91 out of 7) of all of the 11 Internet online players, we asked people to rank.

This was followed by health and medical service providers (4.71) and Government authorities (4.6). These trust levels are typically higher than found in Europe and North America, but not necessarily higher than other regions.

Given the strong desire that we previously noted (see Section 2c) for Government authorities to regulate and manage harmful content it is perhaps surprising that the ranking attributed to Government authorities in MENA is not higher.

Be that as it may, for countries looking to drive a digital economy – and promote both ICT adoption and digital inclusion – the high levels of trust to be found in many of these establishments may provide a good foundation on which to build.

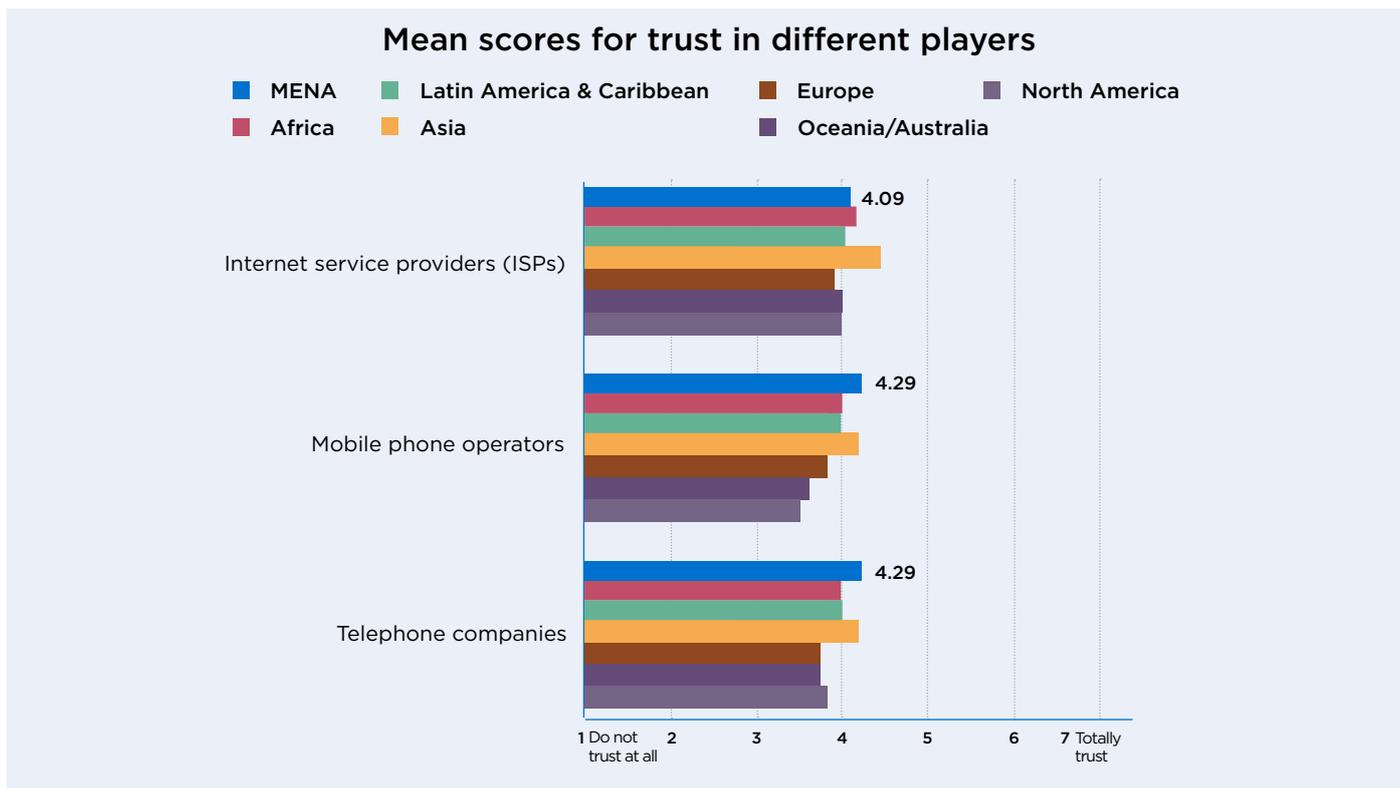


Figure 29: Trust in online players – Telecoms providers

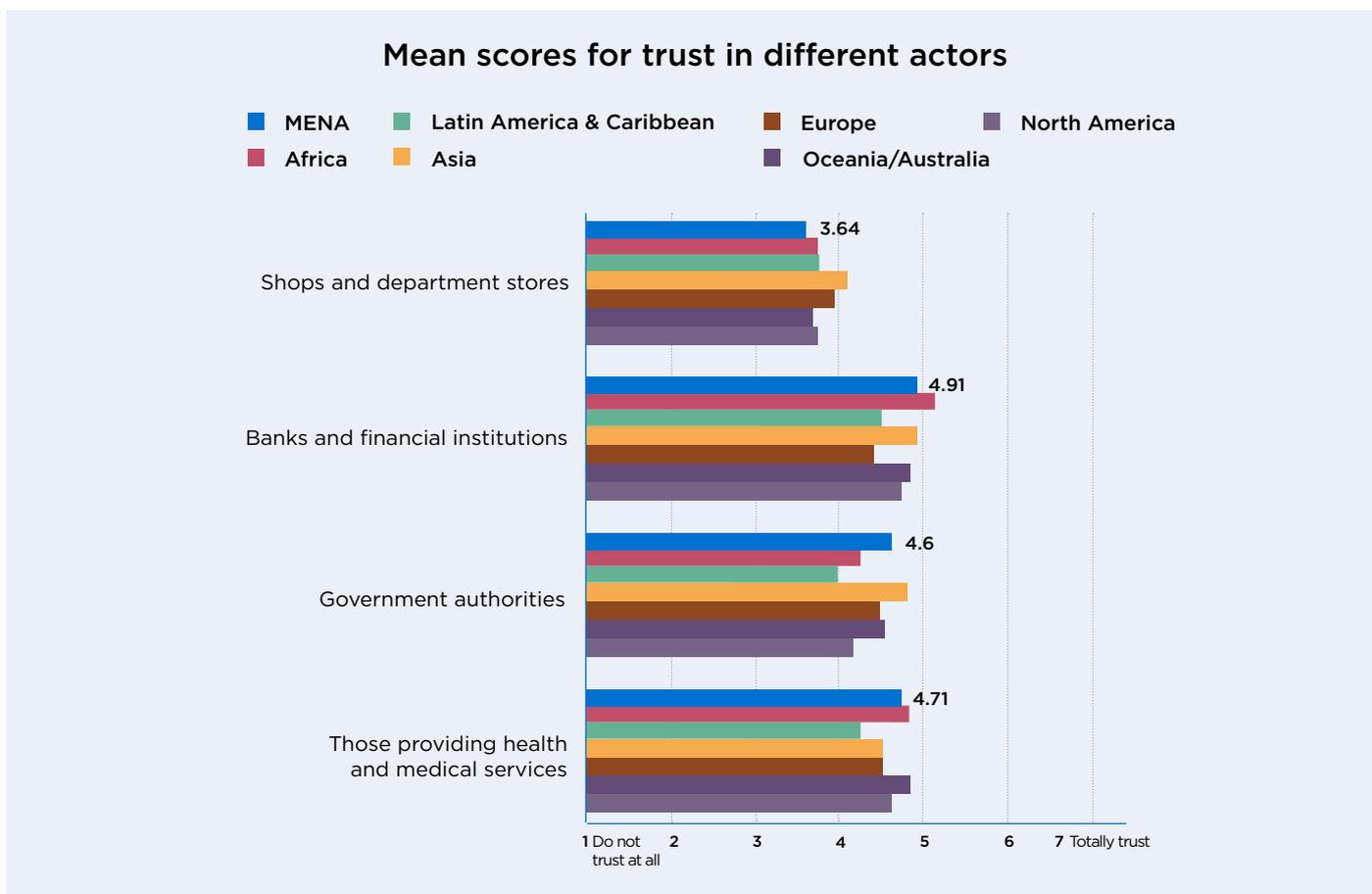


Figure 30: Trust in online players – businesses, offline service providers and Government

Finally we asked people to rate their levels of trust in digital actors such as companies providing social networking services, digital content and online search (see Figure 31).

In each instance all of these online players typically scored lower in MENA than the other online players that we asked them to rate. Only shops and department stores had a lower score.

These scores may also be a reflection of concerns such as the relatively low levels of digital Arabic content available online,<sup>40</sup> and

the fact that many of the other online players we asked respondents to rate (e.g. banks and telephone providers) have a longer standing offline presence and reputation.

In fact, relative to other regions, these digital entities scored more highly in MENA than in many other parts of the world. Trust in social networking companies and search engine providers, for example, is second highest in MENA (and highest in Asia) whilst online content providers ranked third (out of six regions).

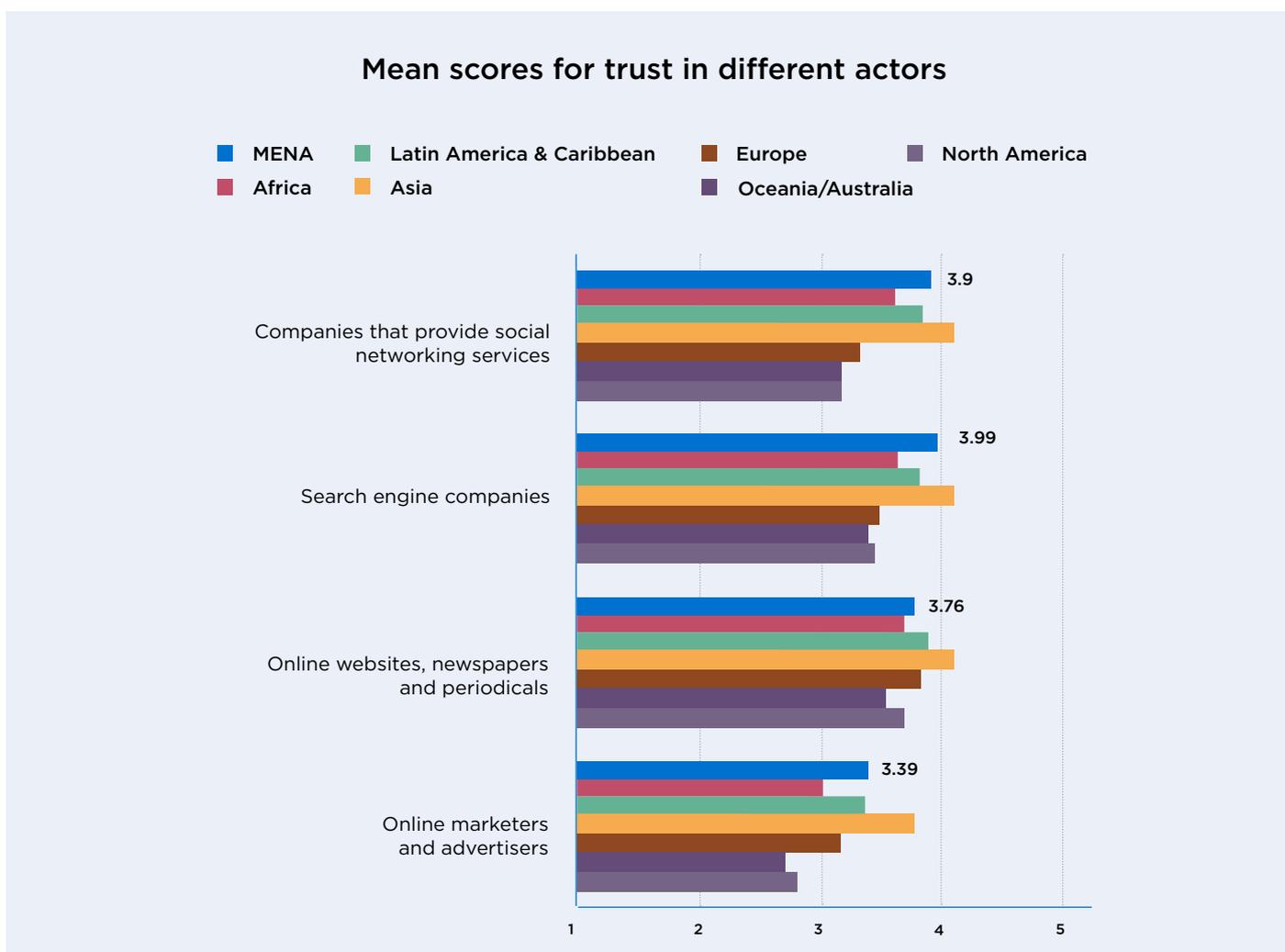


Figure 31: Trust in “digital first” online players

## 5

## Behavior

In the final section we look at the behaviors displayed by Internet users in MENA, particularly with regard to online safety.

One of the reasons why this topic is of interest to policy makers and researchers is that attitudes and behaviors do not always correlate.



### Summary

- MENA Internet users state that they are amongst the most careful online, with nearly 50% of consumers saying they are very careful about what they say and do on the Internet.
- But compared to other regions, MENA's Internet users are among the most likely to open attachments, documents and emails from senders they do not know.
- MENA's online population is also among the least likely to scan their computer or mobile for viruses or spyware. Only users in Asia do this less often.
- That said, they are also amongst the most likely to check their privacy settings.
- Internet users in MENA are amongst the most likely to meet people online that they have not met in person. They are more likely to accept to be "friends" with someone online - or to make "connections" with people they do not personally know - than any other region.

### a. A brief international context

Looking at social networks, for example, a study in the Journal of Computer Mediated Communication addressed users’ attitudes towards privacy and security on social media websites, specifically Facebook. The researchers concluded that amongst US based students, Facebook users were aware of the privacy risks that using the website can entail, but they continued to use the website because of the perceived benefits and gratification that they expect to gain from its use.<sup>41</sup>

Ofcom, the independent communications regulator in the UK has similarly noted that at an international level:

*“Over 60% of consumers [in the UK, France, Germany, Italy, USA and Australia] have concerns about their personal privacy online and how their personal data are used by social networking websites.”<sup>42</sup>*

Yet at the same time, many of them continue to use these sites,

actively engaging in activities which often directly challenges their concerns about privacy – for example by posting photographs or other personal information online.

What this suggests therefore is that some consumers are aware of the risks that they are taking, and that they believe these risks are offset by the benefits of accessing this content.

This conclusion was seemingly reinforced by a 2009 UK study (see Figure 32) which identified that consumers will not only put their concerns to one side for the purposes of social networking, but they will also do so if they wish to access particular products and services (as in the case with e-Commerce).

As a result, 63% of respondents in this study reported concerns about entering their home address online, but only 15% said they “would never” do this.

	Personal privacy concerns	Security/fraud concerns	Agree-people are at risk if buy online	All Internet users
<b>Attitudes</b>				
Confident judging whether a website is truthful	71%	71%	65%	70%
Some search engines will be accurate/unbiased and some won't	52%	56%	57%	54%
Confident as Internet user	88%	88%	84%	87%
Have some concerns about entering home address	63% ↑	62% ↑	54%	50%
Interest in/have installed security features	84%	85%	82%	81%
<b>Behaviours</b>				
Would never enter home address details online	15%	15%	20%	17%
Any checks when visiting new websites	71%	80%	73%	75%
Ever buy or sell online	75%	77%	67% ↓	73%
Ever bank or pay bills online	55%	63% ↑	48%	54%
Narrow use	32%	29%	29%	28%
Broad use	34%	41%	33%	38%

Base: Internet users with personal privacy concerns (159), security/fraud concerns (299), those who agree people put their privacy at risk if they buy online (425); all Internet users (1282)

Source: Ofcom research, fieldwork carried out by Saville Rossiler-Base in April to May and September to October 2009  
Arrows indicate whether percentage is statistically significantly different to “all Internet users”

**Figure 32: Relationship between concerns about privacy/security and attitudes/behavior relating to trust and privacy issues**

Such behaviors are not just found in more mature online markets like the UK and the USA; UNICEF reached similar conclusions in its 2013 study into the digital habits of Kenyan teens.<sup>43</sup>

Although users in these different studies have often made a conscious choice to overlook some of their privacy concerns, we must not forget that there will be others who do not understand the

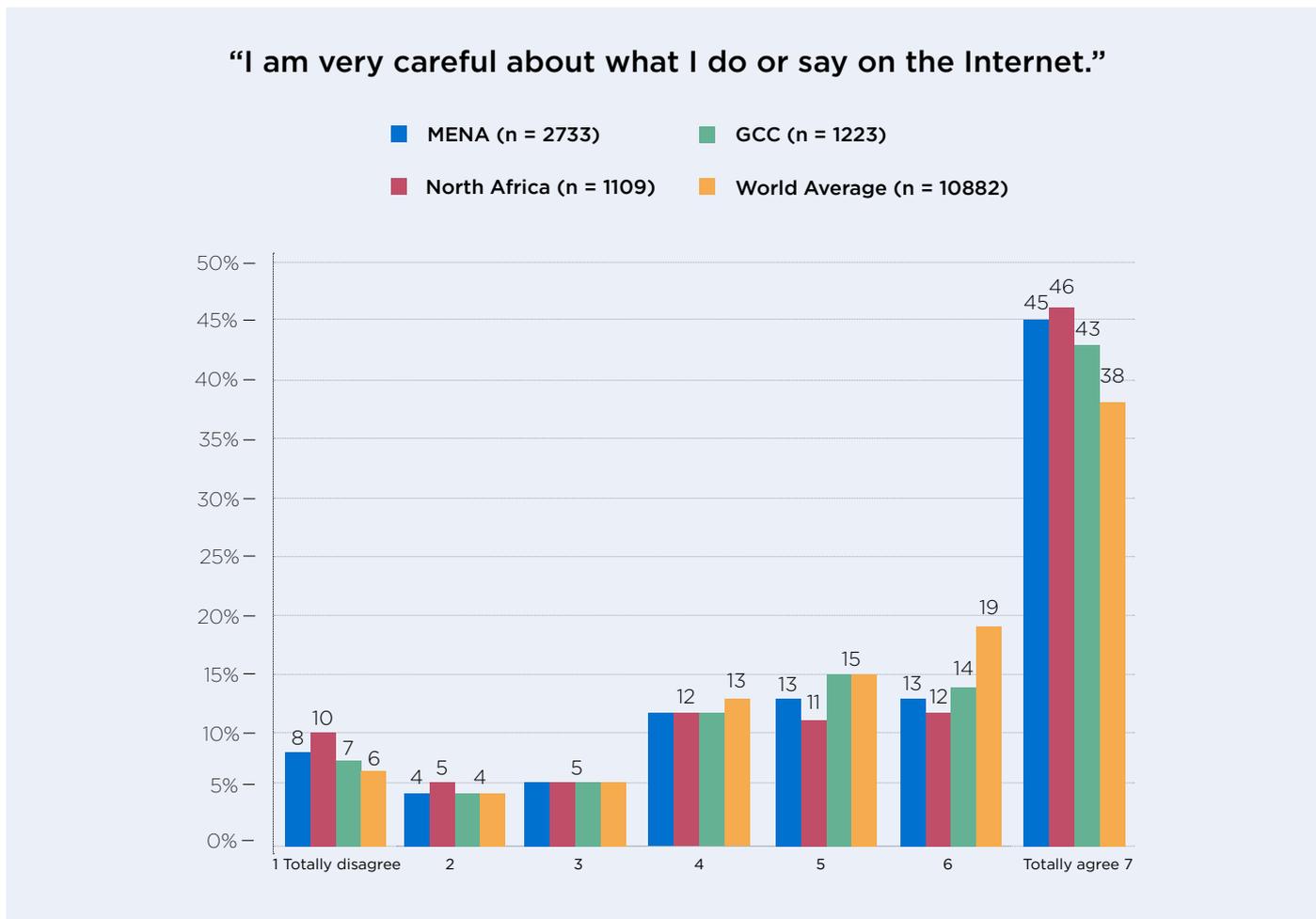
potential consequences of their actions. This may be because they are not aware of their privacy settings or due to the fact that they lack the skills and knowledge to change them.

Because of this, the digital literacy work undertaken by service providers, regulators and other bodies, continues to remain important and of value to Internet users.

## b. Being careful online

MENA Internet users admit to being amongst the most careful online, with 45% saying that they “totally agree” with the statement “I am very careful about what I do or say on the Internet.” The world average for this question is 38% (see Figure 33).

Of those who disagree with the above statement – and who are thus amongst the least careful online – we again see some correlation between skills and years of experience online (see Figure 34).



**Figure 33: Extent to which Internet users are careful online**

15% of those who disagreed with the view “I am very careful about what I do or say on the Internet,” have been online users for less than six months, whilst 27% gave themselves the lowest possible rating for their Internet skills. 11% also only use the Internet for 0-5 hours a week, the lowest total available.

This suggests that new Internet users, as well as those with low skills who are casual Internet users (and thus not online that often) are amongst the least careful online. This is a particularly easy conclusion to jump to given that a third of this group of users is over 55 years old.

However, 28% are under 24, an age group likely to be amongst the most active of online users. This is also a group who are more likely to experiment with their online identity. And with 16% of this total group being online for more than 16 hours a week – and 18% reporting that they have more than five years of online experience – we cannot assume that the least careful online are the least experienced and the least engaged. Instead, the data suggests that for some MENA Internet users, this “uncareful” approach is a deliberate choice.

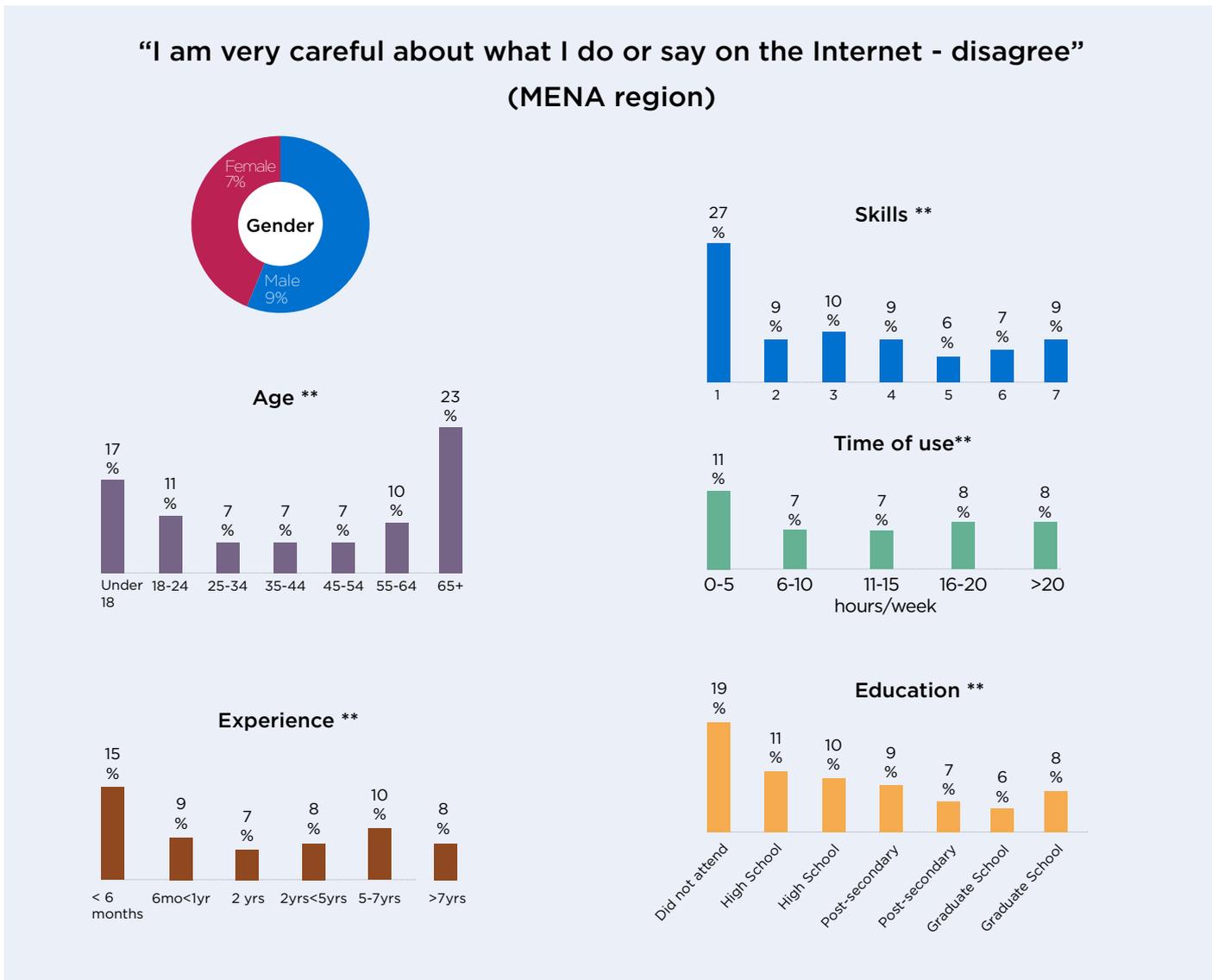


Figure 34: Users who disagreed with the statement “I am very careful about what I do or say online”

### c. Individual cybersecurity

In our final few charts we asked online audiences how often they undertook certain online behaviors.

From a cybersecurity perspective, this included the frequency with which they opened attachments or emails from senders they didn't know, through to how often they scanned their computer for viruses or checked their privacy and security settings (see Figure 35).

Compared to other regions, MENA's Internet users are among the most likely to open attachments, documents and emails from senders they do not know. Users in North America and Oceania are much less likely to undertake this sort of risky behavior.

MENA's online population is also among the least likely to scan their computer or mobile for viruses or spyware. Only users in Asia do this less often.

This suggests there may be a need to raise awareness amongst Middle Eastern Internet users about the risks of such behavior and how they can better protect themselves online from viruses and spyware. For employers the merits of this are even more acute given the rise of people using their personal devices for work purposes. <sup>44</sup>

On the positive side, MENA Internet users do check their online privacy and security settings more frequently than in most other regions, perhaps reflecting the concerns mentioned earlier in this report about data being repurposed without permission; and the general care shown by MENA's Internet users about their online behaviors and activities.

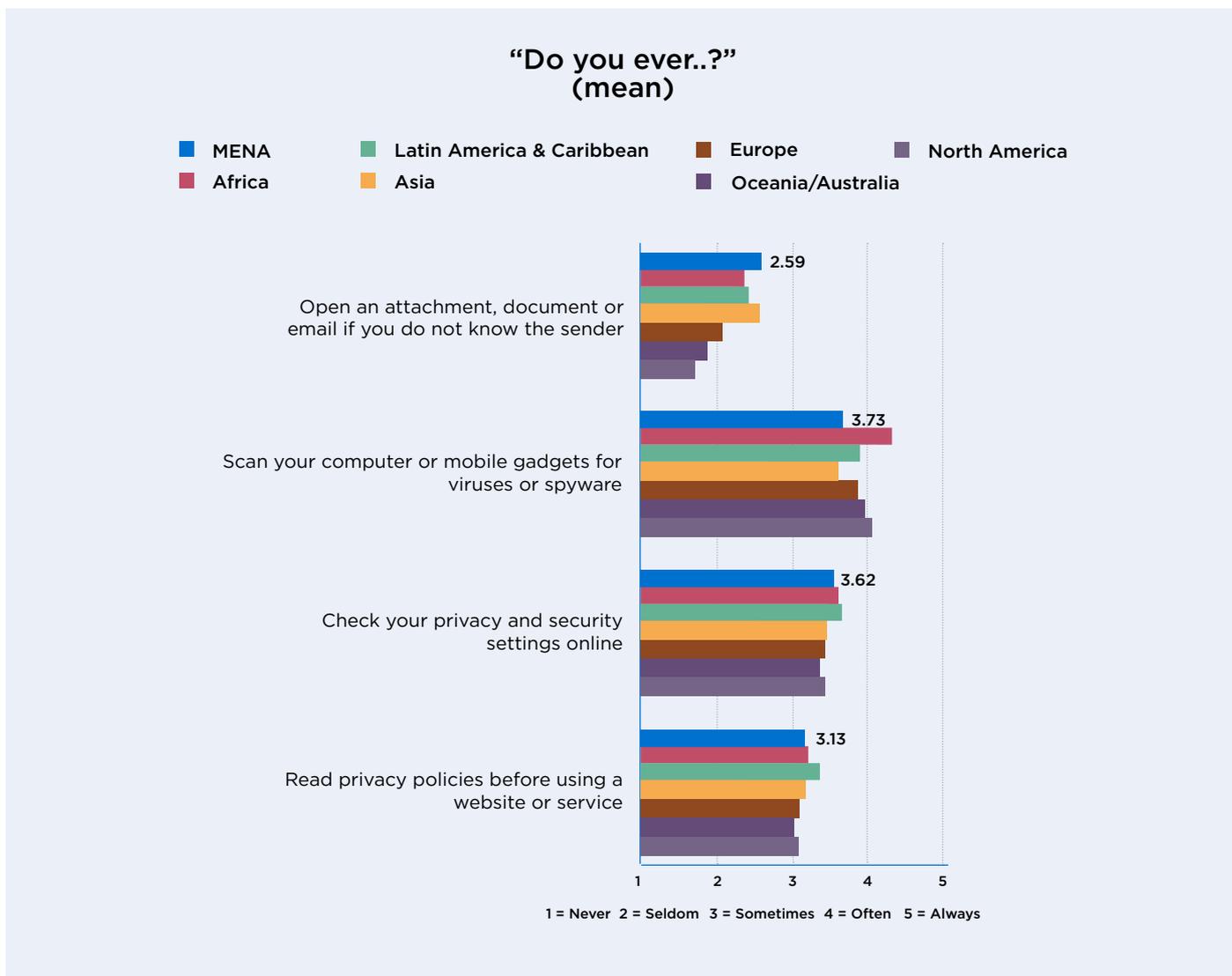


Figure 35: Attitudes towards individual cybersecurity

### d. Cybersafety

When it comes to cybersafety – notably meeting people in person that they met first online – MENA Internet users are surprisingly relaxed about this (see Figure 36).

They are also amongst the most likely to meet people online that they have not met in person and are more likely to accept to be “friends” with someone online – or to make “connections” with them (e.g. on LinkedIn or other social networks) – that they do not personally know.

These conclusions may be surprising given the conservative nature of much of the MENA region, as well as previously expressed

concerns about being careful about what they say and do online. But perhaps it also shows that in certain situations MENA Internet users are keen to use the web as a means to broaden their social circle. Given some of the cultural challenges which may make it difficult to undertake elements of these behaviors “in real life,” it is perhaps not surprising that social networks and messaging apps are being used to this end.<sup>45</sup>

This is a further area where a more detailed analysis – particularly one which maps these findings against age and years of online experience – may offer some interesting conclusions, and is another area which may merit further study in the future.

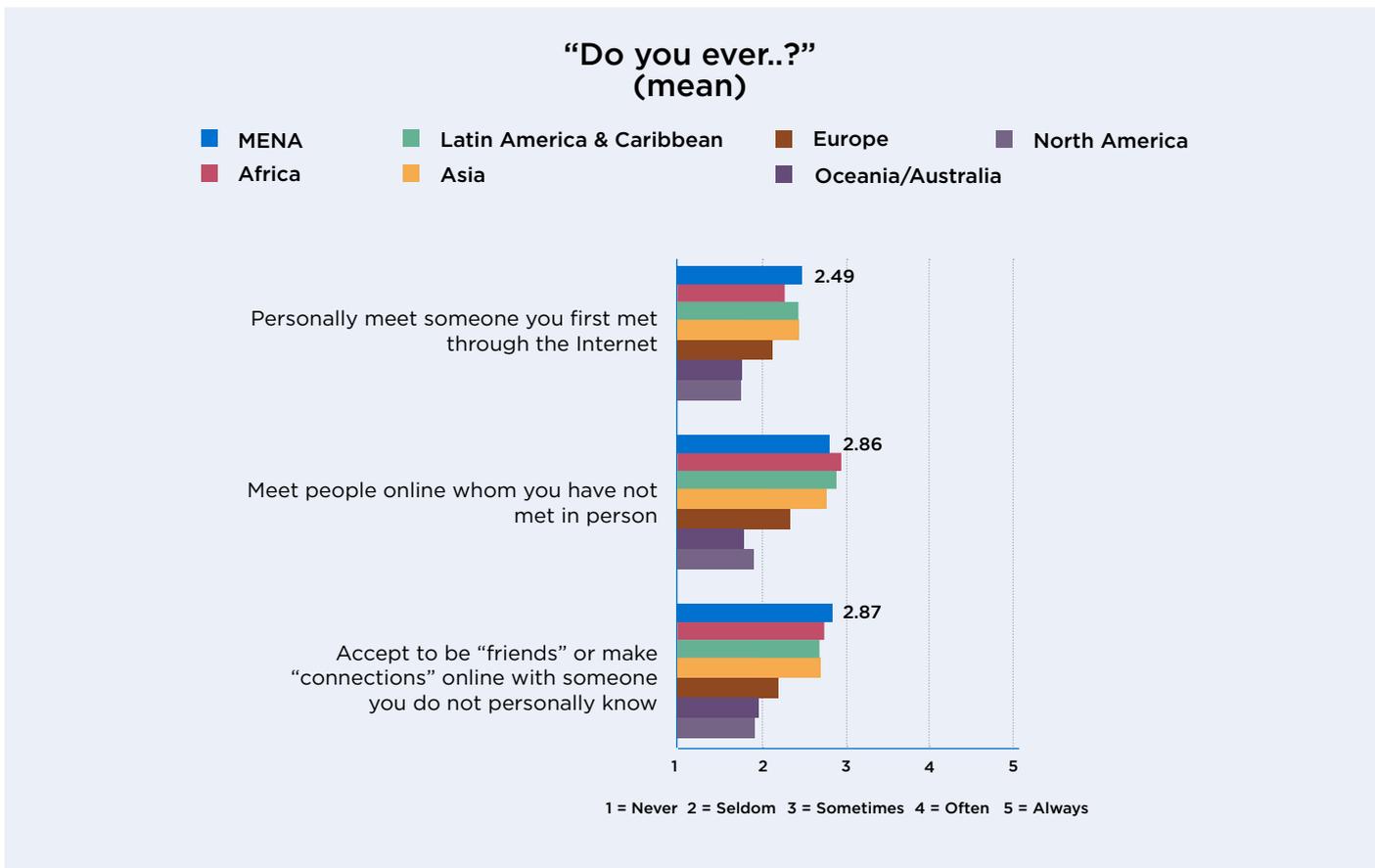


Figure 36 : Attitudes towards individual cybersafety

### e. Data Privacy

Finally we also asked Internet users about the extent to which they used their real name on the Internet, used multiple email accounts or sought to be anonymous online.

The question of anonymity is interesting given that – as we saw in Section 2b (See Figure 16) there is a strong part of MENA’s online population who support the principle of being able to be anonymous on the Internet at certain times – a figure slightly above the world average.

Equally, we also saw in Section 1f (see Figure 12) that MENA Internet users are also the most likely to express an opinion about politics online.

Interestingly, despite these two earlier data points, MENA Internet users are not the most likely to want to go online anonymously to

express an opinion. Internet users in Asia and Latin America are more likely to exhibit this behavior.

Likewise we also saw that MENA users are very careful about what they say and do on the Internet (see Section 5b and Figures 33 and 34). Given this, it is perhaps surprising that MENA users are amongst the top percentile for using their real name on the Internet, although they are also amongst the most likely users to have created multiple email accounts with different names (see Figure 37).

These examples suggest that just as we have seen in other markets (see Section 5a) the connection between attitudes and behaviors is not necessarily a simple one, but rather a dynamic relationship which is often highly nuanced depending on the purposes, sites and individuals concerned.

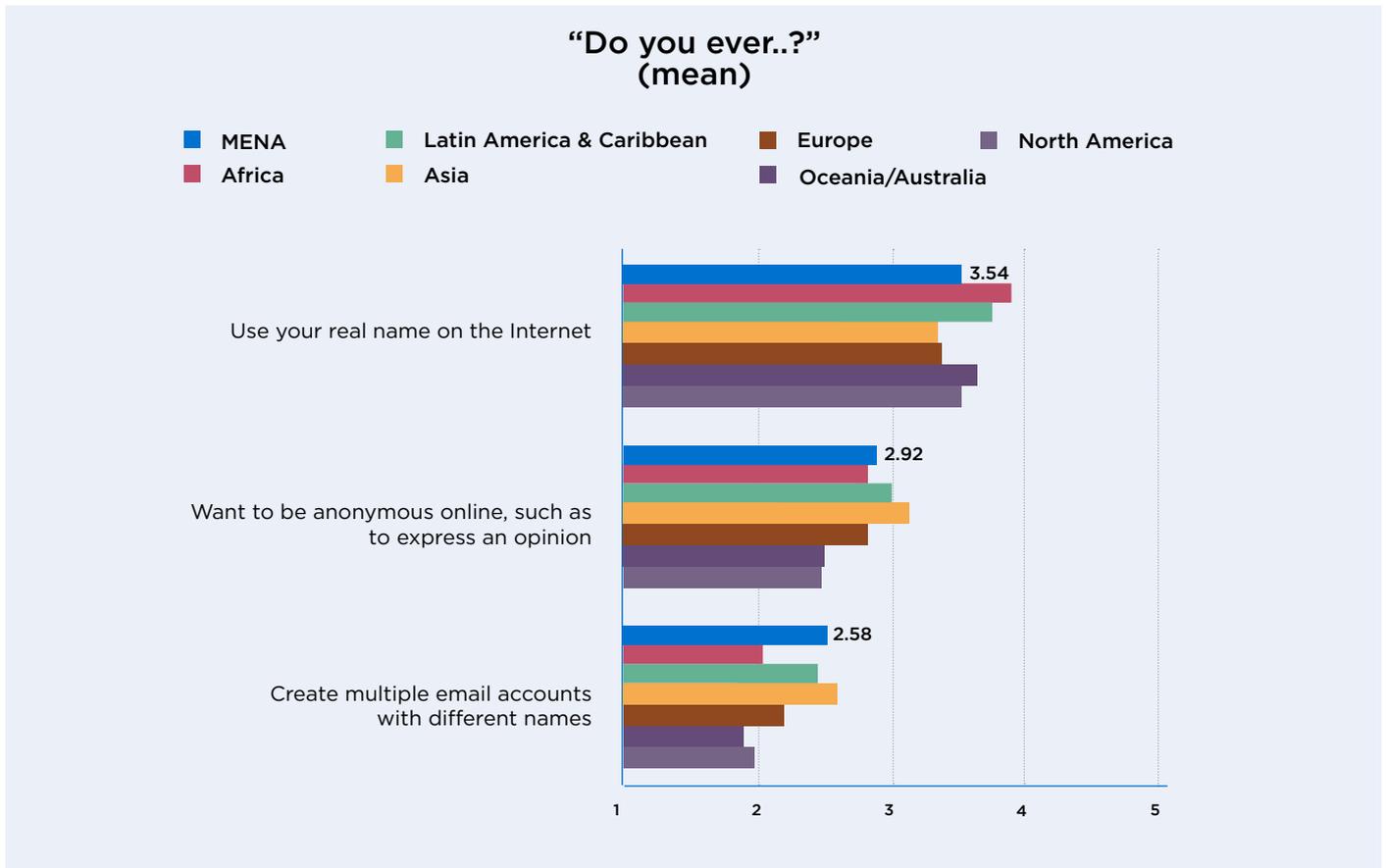


Figure 37: Protection of personal identity online

## Concluding remarks

This report provides an initial insight into the views of Internet users in the MENA region to questions around online behaviors and attitudes, as well as allowing us to build up a picture of the Arab digital household.

What this shows us is that the MENA region is not an outlier. Substantial numbers of MENA Internet users display attitudes and behaviors in line with other Internet users across the globe.

Nonetheless, differences do exist, particularly around the role that online citizens feel that their Government's should play to protect them from harmful content; and the levels of trust that they place in different Internet online players.

MENA's Internet population is typically more cautious about what it says and does online too. Yet at the same time they're also amongst

the most likely to go online to meet new people and make new connections too, and overwhelmingly they feel that the Internet is a positive force in their lives.

These potential contradictions reflect the challenges of understanding Internet diffusion, challenges which will become more pronounced as young and populous regions such as MENA, Asia-Pacific and Latin America find themselves at the forefront of the next billion going online.

The role of MENA in this space will be an interesting one. According to some sources, the MENA region will see the largest percentage growth of Internet users over the next couple of years (see Figure 38).

<b>Internet Users Growth Worldwide, by Region, 2011-2016</b>						
<b>% change</b>						
	2011	2012	2013	2014	2015	2016
Middle East & Africa	19.1%	17.8%	13.2%	10.6%	8.6%	7.6%
Asia-Pacific	14.0%	12.4%	10.3%	7.4%	5.4%	5.4%
Latin America	12.6%	12.3%	9.1%	7.8%	6.1%	4.9%
Eastern Europe	10.6%	9.8%	8.7%	7.0%	5.4%	4.7%
Western Europe	4.1%	2.9%	2.8%	2.3%	1.8%	1.3%
North America	3.4%	2.9%	2.5%	2.3%	2.3%	1.8%
<b>Worldwide</b>	<b>11.2%</b>	<b>10.2%</b>	<b>8.5%</b>	<b>6.6%</b>	<b>5.1%</b>	<b>4.7%</b>

*Note: ages Individuals of any age who use the Internet from any location via any device at least once per month*  
*Source: eMarketer, Feb 2012*

**Figure 38: Internet user growth worldwide, by region, 2011-16<sup>46</sup>**

MENA's "youth bulge" – a term which refers to the fact that nearly 30 percent of the region's population now between the ages of 15 and 29<sup>47</sup> and 60% of the total population is under 30<sup>48</sup> - may mean that the dynamics of the Middle East's Internet will change substantially in the future.

We do not know, for example, if new users of the web will share the same views of the Internet as existing users. Or indeed if the views of existing users will evolve over time.

This report – and the dataset behind it – potentially provides a starting point for us to be able to track that evolution. It is going to be an interesting journey.

## Recommendations

Below we have outlined a number of recommendations based on the conclusions of this research. They include areas for potential further study and analysis, as well as other activities related to the conclusions derived from this data. Below are twelve suggestions we think merit further consideration:

### General

1. **Repeating the field work to test change over time; and to observe any potential changes in Internet attitudes and behaviors.** To allow for a greater possibility of change, this probably needs a 2-3 year gap, This would mean conducting new research in either 2014 or 2015, given that data in this report derives from late 2012.
2. **More detailed demographic analysis:** Further scrutiny of this data by gender and age - as well as level of Internet experience and formal education - could all shed new light on our research findings and potentially suggest where interventions (in the form of policy, practice and outreach) may be most effectively targeted/needed.

### Access to Technology

3. **Frequency of ICT access and Internet behaviors:** this is not covered in our current dataset and would allow us to understand the popularity of certain technologies and online activities, beyond top-level penetration.
4. **Understanding the overlap between cable and satellite households:** our data suggests that some households enjoy both of these technologies. It would be interesting to explore why in these households both platforms are used; and also to see if this overlap (along with the penetration levels of these services) changes over time as a result of IPTV and 4G technologies becoming more mainstream.
5. **Time spent on different devices:** technology penetration is high in many parts of the region, but we would also benefit from deepening this insight through understanding the length of time spent with devices, and where they are used. By ascertaining this, and tracking it over time, we would also gain a comprehension of how emerging behaviors - such as mobility - are also impacting on MENA's Internet users.

### Attitudes

6. **Understanding what Internet users want from Government authorities:** MENA Internet users are overwhelmingly more supportive of Government authorities blocking online content such as pornography, or material which is 'discriminatory' or 'racist', than other regions. Probing how users want Government authorities to address these issues could yield some useful, and potentially actionable, insights.

We could examine this through qualitative research. This approach would also allow us to understand the extent to which users are aware of current activities undertaken by Government agencies and ISPs in this space; and whether these efforts need to be communicated more effectively, or in different ways, to end users.

7. **Perceptions of the Internet:** older users, as well as those with lower levels of Internet experience and skill levels, tend to have more negative views of the Internet. Given the experiential nature of the web, these attitudes may change over time, as experience and skill levels increase. Testing this hypothesis with a 'control' group could be valuable.

### **Levels of Concern /Trust**

8. **The reuse of their public data is not something MENA Internet users are comfortable with.** Qualitative research which investigates these attitudes would enable us to understand the reasons for the variance between MENA users and global averages.
9. **“The Snowden Effect”:** the impact of revelations about online monitoring may have a bearing on the trust levels that users have towards various Internet players. However, this status – and any possible impact – is currently unknown in the Middle East.

### **Behavior**

10. **e-Commerce and Online Banking:** MENA Internet users are considerably less likely to make online purchases or do online banking, when compared to other regions. Further research can help us identify the reasons for this; which may include service availability, consumer attitudes towards the safety of this activity, or other considerations.

Given that banks and financial institutions were the highest rated Internet “actors” amongst our sample, this is an area which could be particularly interesting to study.

It also suggests that this popularity and trust could potentially be leveraged by these online players to encourage their customers to enjoy a greater breadth and depth of Internet experience; alongside also being used to promote safer Internet behaviors.

11. **Being safe online:** there is a disconnect between how careful users say they are online and their declared behaviors. Qualitative studies could enable us to determine if deliberate choices are being exercised.

Similarly there may be a value in testing the effectiveness of existing cybersafety messages to see if these are reaching the wider population and those audiences who admit to being less careful online.

12. **Making new friends / connections online:** understanding the popularity of this behavior across all age groups – and genders - may also be worthy of additional exploration.

## Appendix 1: Methodology

### a. About MENA

The MENA region is a wide and diverse one. This diversity includes language and wider economic factors. The World Bank notes:

***“The Middle East and North Africa (MENA) is an economically diverse region that includes both the oil-rich economies in the Gulf and countries that are resource-scarce in relation to population, such as Egypt, Morocco, and Yemen...”<sup>49</sup>***

The impact of this diversity is also reflected in access to – and usage of – technology. These differences are not as explicit as might be expected in this report, especially given data from the World Bank’s which notes that “about 23 percent of the 300 million people in the Middle East and North Africa [are] living on less than \$2 a day.”

Nonetheless, as cited in Section 2a of this report, Northwestern University in Qatar has noted there is:

***“...a genuine digital divide, between the four wealthy Gulf states – Bahrain, Qatar, Saudi Arabia and UAE – and those that do not share such abundance – Egypt, Jordan, Lebanon and Tunisia. The digital divide demarcates technological abilities in the Arab world about as starkly as anywhere on earth.”<sup>50</sup>***

Often these differences can be found in access to next generation technologies. Mobile penetration, for example, is high across the region and over 100% in many countries. Mobile connections over the past 10 years, have grown from 19 million connections in 2002 to 391 million in 2012.<sup>51</sup> However, access to 3G and 4G – which includes both service availability and the affordability of such services – varies substantially.

***“...there are substantial differences in national markets across the region. For example, eight MENA countries enjoy mobile broadband penetration levels above 50 percent of the population – rising to more than 70 percent in Bahrain – while 3G and 4G services are not currently available in Algeria, the West Bank and Gaza.***

***Meanwhile, in Iraq and Iran – despite the fact that these services are nominally available – limited availability (in Iraq, for example the only 3G operator is currently confined to the Kurdish Region,) has resulted in mobile broadband penetration levels of less than one percent.”<sup>52</sup>***

The implication of these differences may lie more therefore in the breadth and depth of usage of these technologies – and the possibilities afforded by next generation technologies and “always on” connections, rather than the basic technology per se.

## b. Defining MENA

There is no agreed definition of what constitutes the MENA region. For the purposes of this report, we have used the following classification.

MENA Region		
GCC	North Africa	Other MENA
Bahrain	Algeria	Iran
Kuwait	Egypt	Iraq
Oman	Morocco	Jordan
Qatar	Tunisia	Yemen
Saudi Arabia		
UAE		

Figure 39: MENA region by country

## c. Data collection

In consultation with Qatar's Ministry of Information and Communications Technology, this research was conducted by the Oxford Internet Institute, University of Oxford, in collaboration with the Samuel Curtis Johnson Graduate School of Management, Cornell University.

An online survey of Internet users in 14 nations across the Middle East and North Africa was conducted in two phases, from July through September 2012, fielded by the market research company Toluna (with a break during Ramadan).

The survey was conducted in collaboration with the World Economic Forum (WEF) and the digital analytics company comScore, as part of a wider global survey into the attitudes and media behaviors of Internet users.

This data was then merged with an online survey of Internet users fielded by comScore in selected nations worldwide from July through September 2012.

The sample for this research targeted the total online population in each of the selected countries. Targeted samples were generated by the system based on specific quotas and sampling requirements.

The overall sample was stratified to the quota targets that were agreed by the research team. In instances where general demographics in a given quota cell did not reflect the natural online population, sample weighting was applied.

### Survey Samples

Panel	Size
Toluna Sample (MENA only)	2,039 respondents
comScore Sample (Global - including MENA)	9,166 respondents

<b>Total MENA sample:</b>	<b>2,793 respondents, from 14 countries</b>
<b>Total Global sample:</b>	<b>11,225 respondents, from 58 countries</b>
<b>Total non-MENA sample:</b>	<b>8,432 respondents, from 44 countries</b>

## d. Breakdown by country

Where MENA figures are provided in our report these are a combination of the GCC and North Africa samples, as well as data from other countries in the region which do not sit clearly under the “GCC” and “North Africa” labels (See Figure 39).

From our MENA sample of 2,793, a total of 396 respondents (14%) come from these additional countries. Of these only the samples for Jordan and Yemen feature more than 10 respondents, (with 392 of the additional 406 respondents).

MENA Region	Number of Respondents	Percentage of Sample
Algeria	229	8.1%
Bahrain	11	0.39%
Egypt	529	18.8%
Iran	3	0.1%
Iraq	1	0.03%
Jordan	243	8.6%
Kuwait	197	7%
Morocco	270	9.6%
Oman	141	5%
Qatar	156	5.5%
Saudi Arabia	511	18%
Tunisia	108	3.8%
UAE	245	8.7%
Yemen	149	5.3%
<b>GCC</b>	<b>1,261</b>	<b>45.1%</b>
<b>North Africa</b>	<b>1,136</b>	<b>40.5%</b>
<b>Additional MENA Countries</b>	<b>396</b>	<b>14.1%</b>
<b>Total</b>	<b>2,793</b>	<b>100%</b>

Figure 40: MENA sample breakdown by country

## e. Breakdown by age group and country

MENA Region	Under 25		25 - 34		35 - 44		45 +	
	#	%	#	%	#	%	#	%
Algeria	56	2.00%	104	3.71%	44	1.57%	25	0.89%
Bahrain	1	0.04%	5	0.18%	2	0.07%	3	0.11%
Egypt	229	8.17%	188	6.71%	76	2.71%	36	1.28%
Iran	0	0.00%	0	0.00%	3	0.11%	0	0.00%
Iraq	0	0.00%	1	0.04%	0	0.00%	0	0.00%
Jordan	35	1.25%	90	3.21%	60	2.14%	58	2.07%
Kuwait	15	0.54%	74	2.64%	72	2.57%	36	1.28%
Morocco	69	2.46%	115	4.10%	49	1.75%	37	1.32%

MENA Region	Under 25		25 - 34		35 - 44		45 +	
	#	%	#	%	#	%	#	%
Oman	25	0.89%	58	2.07%	40	1.43%	18	0.64%
Qatar	23	0.82%	47	1.68%	54	1.93%	32	1.14%
Saudi Arabia	218	7.78%	188	6.71%	81	2.89%	24	0.86%
Tunisia	13	0.46%	29	1.03%	35	1.25%	31	1.11%
UAE	33	1.18%	118	4.21%	70	2.50%	24	0.86%
Yemen	23	0.82%	80	2.85%	30	1.07%	16	0.57%
	<b>740</b>	<b>26.40%</b>	<b>1,097</b>	<b>39.14%</b>	<b>616</b>	<b>21.97%</b>	<b>340</b>	<b>12.13%</b>

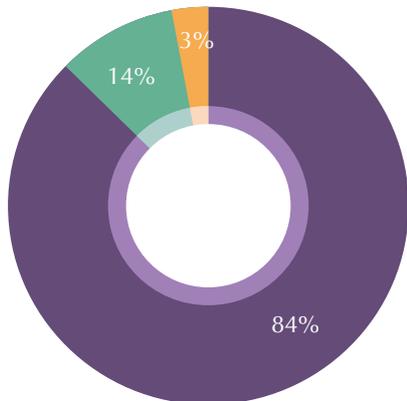
Figure 41: MENA sample breakdown by age

## f. Breakdown by gender and country

Country	Male		Female		Total
	#	%	#	%	#
Algeria	176	77%	53	23%	229
Bahrain	7	64%	4	36%	11
Egypt	435	82%	94	18%	529
Iran	3	100%	0	0%	1
Iraq	1	100%	0	0	1
Jordan	181	74%	62	26%	243
Kuwait	154	78%	43	22%	197
Morocco	195	72%	75	28%	270
Oman	107	76%	34	24%	141
Qatar	116	74%	40	26%	156
Saudi Arabia	396	77%	115	23%	511
Tunisia	80	74%	28	26%	108
UAE	162	66%	83	34%	245
Yemen	126	85%	23	15%	149
<b>Total</b>	<b>2,139</b>	<b>77%</b>	<b>654</b>	<b>23%</b>	<b>2,793</b>

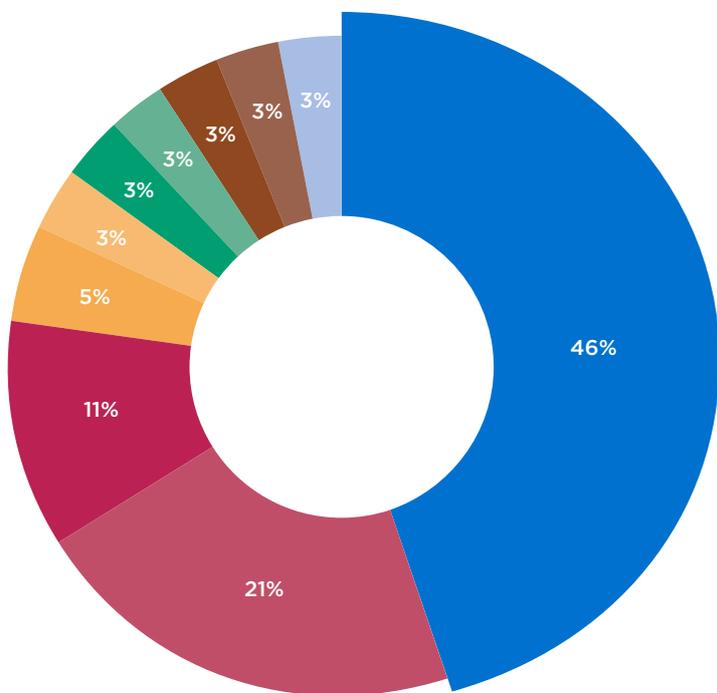
Figure 42: MENA sample breakdown by gender

**g. Breakdown of responses by language**



**Survey languages - MENA region**

- Arabic
- English
- French



**Survey languages - Global sample**

- English
- Arabic
- LatAm Span.
- Chinese
- French
- German
- Japanese
- Spanish
- Italian
- Korean

Figure 43: Sample breakdown by language used to complete online survey

## Appendix 2: Tools, tips and online learning resources

Alongside the articles and content referenced throughout this report, below we have included links to a number of articles, research reports and learning tools which allow readers to explore some of the key topics featured in this report in more detail.

### a. Research reports

1. Being online: an investigation of people's habits and attitudes, Ofcom (2013).  
<http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/being-online.pdf>
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