

# Survey on "Access to, and Use of, Information and Communication Technology (ICT) by Households and Individuals" in Oman

- 11,000 randomly selected households across the Sultanate were visited
- 83% of households own at least one computer and 80% of individuals use computers
- 80% of households have Internet access, while 67% of individuals use the Internet

For the first time in the Sultanate, the Information Technology Authority (ITA) conducted its survey on the 'Access to and Use of Information and Communication Technology (ICT) by Households and Individuals 2013'. The survey covered 11,000 randomly selected households across the Sultanate, with the questionnaire having been designed as per the international standards on measuring ICT for development created by the Partnership for Measuring ICT for Development and the International Telecommunication Union – ITU.

The survey aims at achieving the following objectives:

- Measure the access to and use of ICT by the households and individuals to assist key decision makers and strategic planners to formulate initiatives related to ICT in households and individuals.
- Assess the digital divide.
- Provide a benchmark for international comparisons.

The survey was comprised of three main parts. The first part aims to investigate the extent of the usage of Internet, computers, cell phones in the household. The second part focuses on the relationship between the age and the nature of technology a certain user finds best to use and the use of social media. In other words, video games might be preferred by a 6-year-old child, while a teenager might more likely opt for social channels through a cell phone rather than use a personal computer or a laptop.

The third part is mainly to measure how interactive the users are in regard to the eGovernment services, as well as to know their impression about available Internet services in the Sultanate.

The data were collected using smart devices and were sent on a regular basis to the existing database at the headquarters of the company executing the project. The data was then reviewed, cleaned, and then analyzed to extract the below findings.

## Households Indicators

As shown in Graph #1 (Households Indicators), communications within households are essentially based on mobile and smart phones. When investigating the telephone usage at the national level, more than 90% of households possess at least one mobile

**Up to 90% of households possess at least one mobile phone or smart phone**

phone or smart phone, while only one quarter of the households interviewed have a fixed-line phone. The wide use of mobile phones reveals a recent acceleration

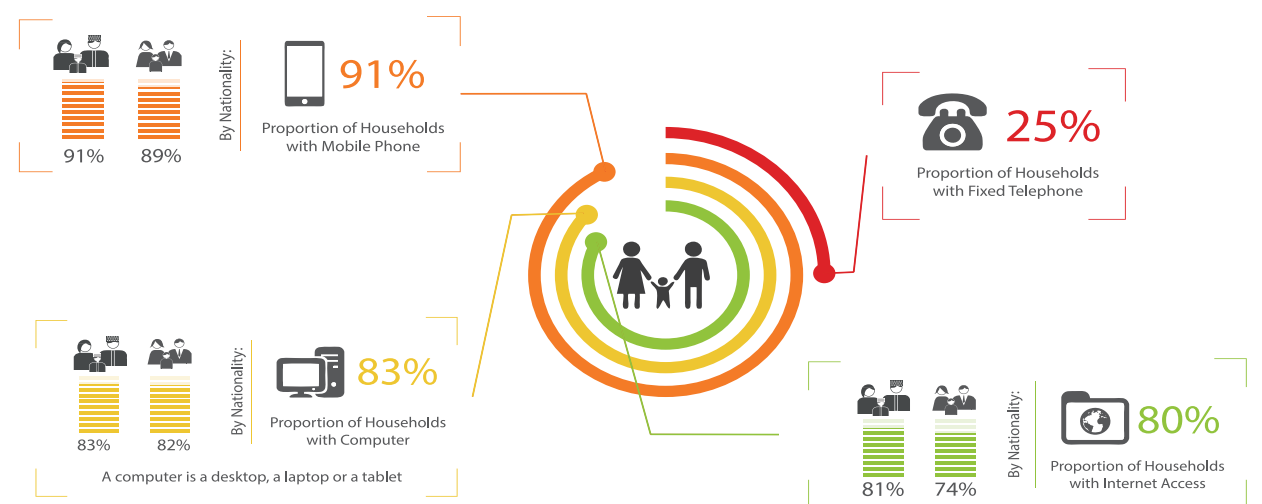
of access to and use of ICT by Oman's population since smart phone technology has been developed in the last decade.

Given the core importance of computers in modern societies, unsurprisingly the large majority of households, more than 80%, own at least one computer (e.g. desktop, laptop or tablet), with Omanis and non-

Omanis at the same relative percentile, with no noticeable difference between urban or rural areas. Laptop computers are widely used, with no difference between Omani and non-Omani households; three in four households own at least one.

When focusing on the different types of computers owned by the households, it appears that in average and at the national level that tablets are the preferred choice over desktop computers. When looking at the reasons for not having a computer, the high cost of purchasing a computer is the main explanation given by half of interviewed households. The second main reason is the lack of need to use one, followed by the lack of ICT Skills.

Talking about the Internet statistics within households, about 80% of households in Oman have Internet access. Consistently, with the conclusion regarding the predominance of mobile ICT devices, the Internet is mainly accessed through mobile broadband (43%), followed by fixed wireless broadband (15%) and



narrow band analogue modem (17%). The low percentages of the traditional cable-based Internet access can be partially explained by the lack of pre-existing infrastructures underlined previously, especially in rural areas.

Results showed that no consistent differences exist between Omani and non-Omani households in Internet access. Despite the high percentage

of Internet access within households, there is small percentage of households who do not have Internet access due to the lack of Internet coverage (42%), the high price of services (32%), the lack of knowledge and skills (25%), lack of need and the high cost of the equipment.

Given that the main characteristic of a smart phone is that it allows the user

to browse the Internet, an explanation can be found by cross-checking the data on mobile phones with the data on computer and Internet access indicates that the higher number of smart phones within households can be seen as a compensation of the absence of Internet access through other devices.

## Individuals Indicators

Looking at Graph #2 (Individuals Indicators), a large majority of the population use computers. Only one in five males and one in four females still do not use one. The use of computers varies in the business sector however depending on the degree of qualification required, which shows a strong correlation existing between the levels of education attained and the intensity of computer use.

Computers are more intensively used in the upper levels of education, and a more intensive use by employees of public sector can be underlined, with percentages reaching 90% among females interviewed. Furthermore, the highest rates of computer use are reached by students (92%), which mean that the specific policies of ICT development within the educational system have obtained positive results. The situation of 'access to and use of computers' is quite similar between the native and expatriate populations as the analysis shows that the main location of using computer is in the home.

The main reasons for not using computers are the lack of knowledge (63%), followed by the lack of knowledge about ICT skills (34%) and the high costs associated with not being able to afford one (23%). The lack of ICT knowledge can be overcome by ensuring that teaching ICT skills in the Omani educational system becomes a sustained policy objective, because as individuals grow older, illiteracy represents a serious barrier to the use of computers, in addition to the lack of need.

Some employment policies should be taken into account with job seekers with regard to their use of computers due to the facts that the survey shows:

- Most job seekers do not recognize the need for the use of computers;
- Half of job seekers in the 15-19 age range (compared to one-third of employed individuals) declare they do not use computers due to a lack of skills; and,

- About 40% of the job seekers also consider the high price of equipment as a barrier.

These facts suggest that targeted ICT awareness and training programs should be designed for this segment, in order to increase their employability.

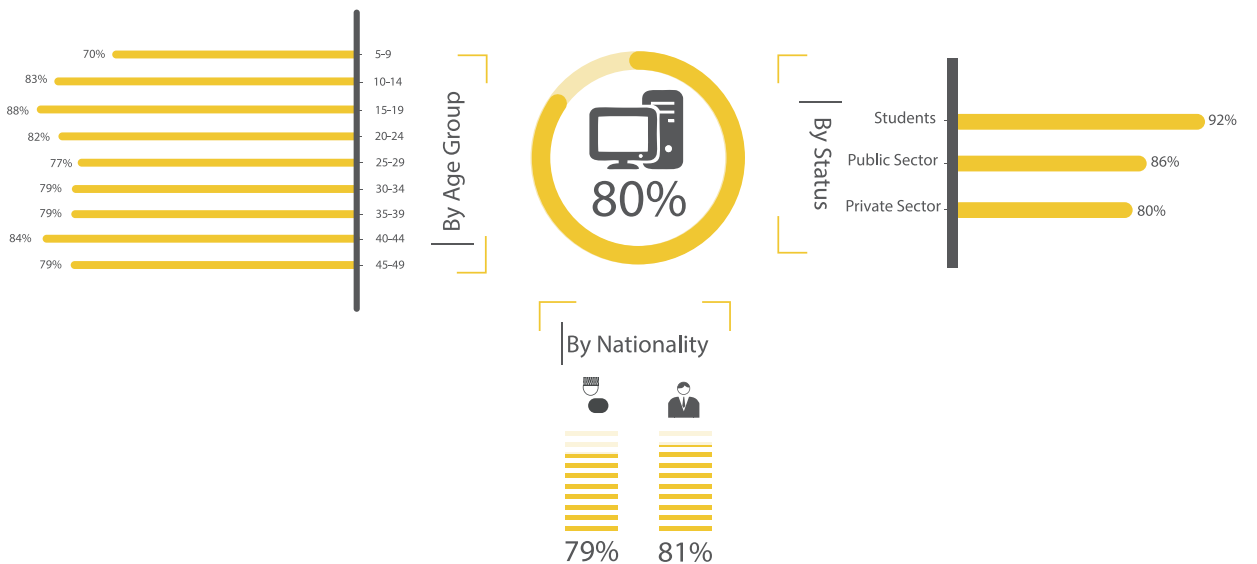
Omani and non-Omani individuals also have similar behaviors concerning mobile communication. Mobile phones are widely used. Of the approximately 90% of individuals interviewed, there was no difference between nationalities. However, the gender gap in the ownership and use of mobile phones is higher within the non-Omani population than within Omani populations.

With regard to Individuals' use of Internet, the Internet is frequently used by three in four individuals who browse the net on a daily basis though no substantial differences exist between Omanis and non-Omanis. The use of computers starts at a very early age, especially among urban youth. In fact, access to Internet increases significantly after the age 15 and the main explanation of this rapid acceleration of 'access to and use of Internet' by young people is the ownership of a smartphone, as shown earlier.

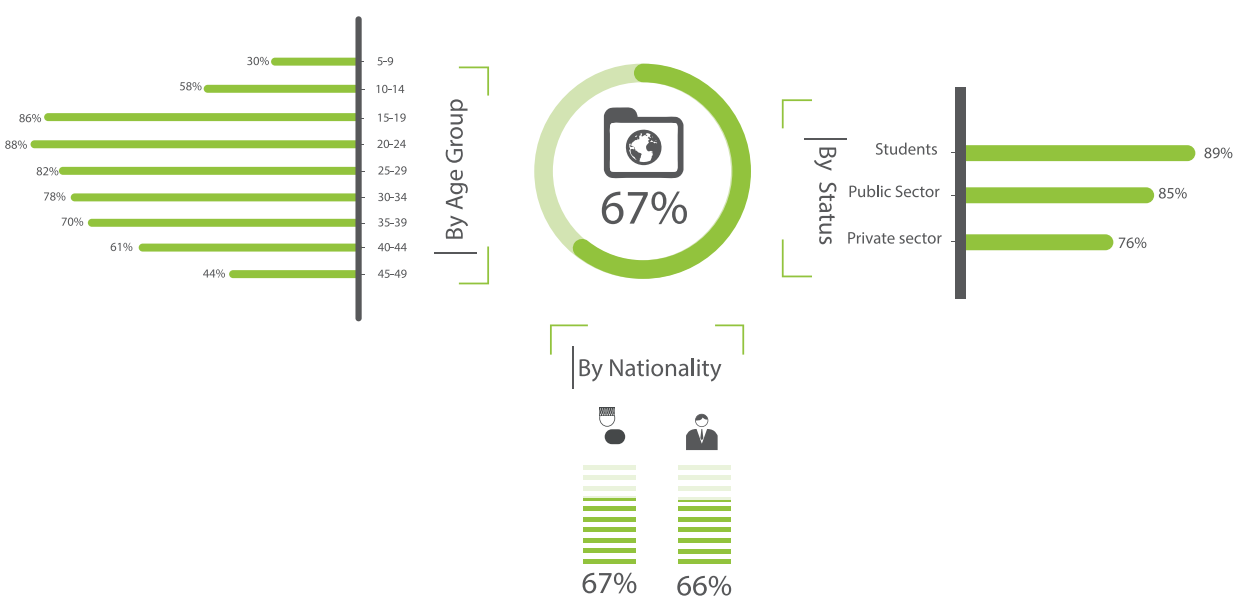
Concerning the use of social media tools, the situation is quite homogeneous throughout the country and as shown in Graph #2, Facebook and YouTube are the most diffused social networks. Only one quarter of individuals interviewed has declared to use Twitter, (22%) use forums and (7%) use blogs compared to (51%) using Facebook and (59%) using YouTube, which are websites essentially used for spare-time and social activities.

**Approximately 60% of individuals use YouTube**

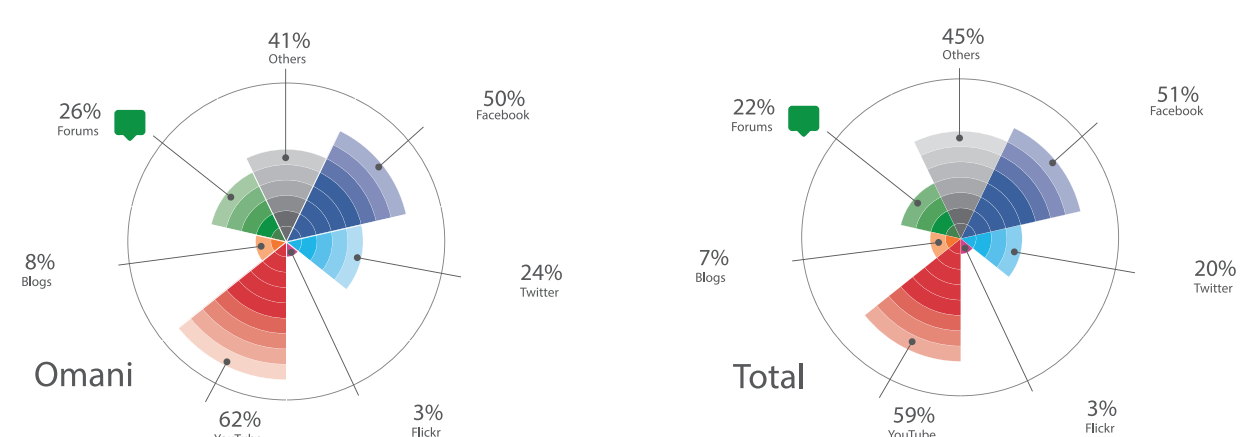
## Proportion of Individuals Using Computer



## Proportion of Individuals Using Internet



## Proportion of Individuals Using the Social Media Networks



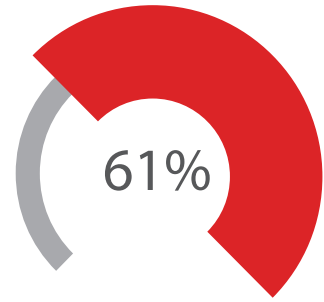
# Survey on "Access to, and Use of, Information and Communication Technology (ICT) by Households and Individuals" in Oman

## eGovernment Services

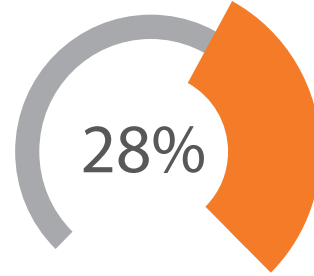
When investigating the use of the eGovernment services, only 8% of individuals interviewed have declared they do not interact with public authorities over the Internet. Of those who indicated interaction with public authorities, the majority of these interactions mainly consist of obtaining information, as is shown in Graph #3.

More or less than half of the population surveyed has demonstrated interest for a wide number of new eServices foreseen to be implemented. Only 14% (from a multiple choice selection) declared to have more complex on-line based interactions like fulfilling downloaded official forms or using online public services. The main issue of eGovernment development still remains, which is to ensure good quality of Internet connection throughout the country.

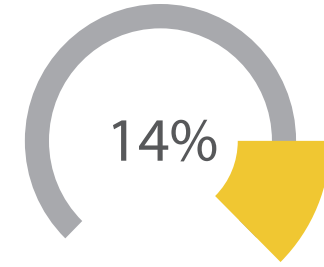
### Interaction with Public Authorities or Public Services over the Internet in the Last 12 Months



Obtaining Information from Government-related Web Sites



Downloading Official Forms



Submitting Completed Forms and/or Using Online Services (e.g. Electricity Bill, Requesting Land)

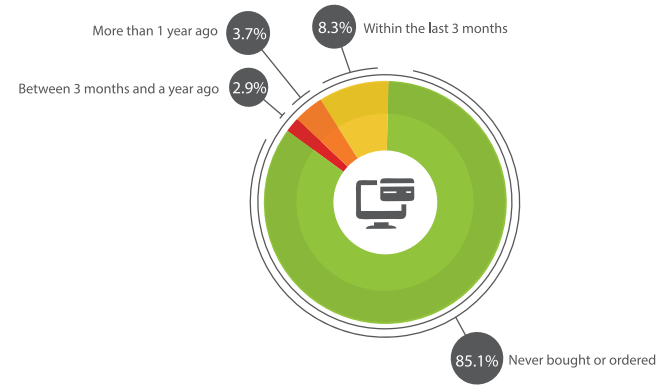


No

## eCommerce

Regarding the eCommerce, results show that the society does not seem to be interested in eCommerce-related services. Raising awareness

of online shopping is very important as 85% of those interviewed indicated they have never bought or ordered anything over the internet.



Proportion of Users Purchasing or Ordering Goods or Services over the Internet

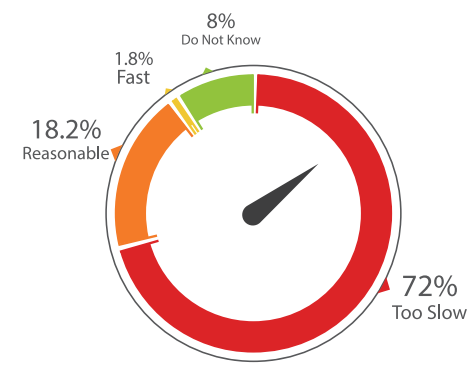
## Feedback on Internet Speed & Price

An explanation to some facts mentioned above can be found in Graph #5 which

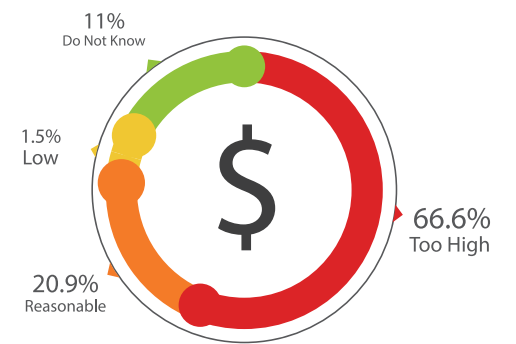
shows the feedback on internet speed and price. More than two in three Internet

users declare that the Internet speed is too slow and that the price is too high.

### FEEDBACK ON INTERNET SPEED AND PRICE



Internet Speed



Internet Price