

# Observatory of digital uses 2021

## The 6 key learnings

3<sup>rd</sup> edition



*“opinionway*


# What is the Observatory of Digital Uses 2021?



**The 3<sup>rd</sup> edition of an international study carried out in 13 countries.**



**16,986 people surveyed between 7 May and 15 October 2021.**



**Measuring the evolution of digital habits, understanding the impact of the pandemic on practices, and studying digital maturity.**



**Sharing the results with interested parties.**

# One study, 13 countries (11 Orange countries), 16,986 interviewed

1

## All population

*Focus on penetration rates and profiles of non-internet users, novice users and more advanced digital users. (digital equality)*



**3 European countries**  
(1,000 respondents per country)



**Telephone interviews**

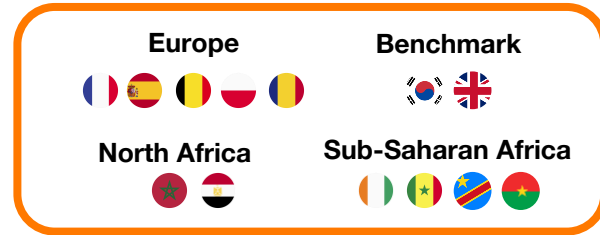
From 7th to 26th May 2021

## Digital users

2

*A deep focus among digital users of digital practices, evolutions and associated attitudes*

**13 countries worldwide**  
(More than 13,000 interviews among digital users aged 15 to 80 years old)



**Online and telephone interviews**



From 16th June to 15th October 2021

## 6 key learnings

- 1 Intensification of digital uses**
- 2 Who are today's digital users?**
- 3 Benefits of digital: the importance of keeping in touch**
- 4 Digital obstacles: data protection a major issue**
- 5 The positive impact of digital technology on the environment**
- 6 The positive impact of digital technology on society**

# The proportion of digital users in the populations has increased since 2019, especially in Spain and Morocco

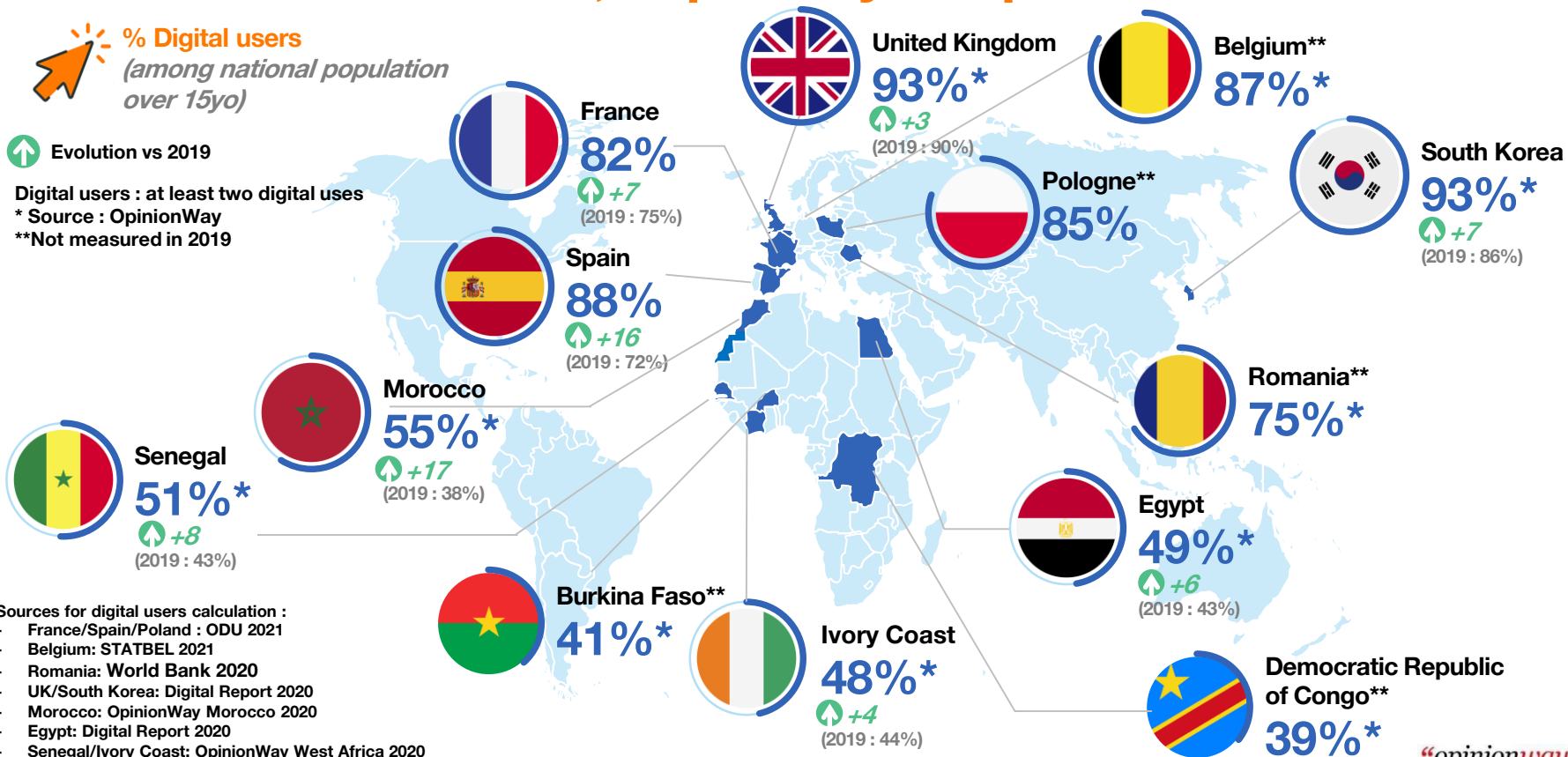
 **% Digital users**  
(among national population over 15yo)

 Evolution vs 2019

Digital users : at least two digital uses

\* Source : OpinionWay

\*\*Not measured in 2019



Sources for digital users calculation :

- France/Spain/Poland : ODU 2021
- Belgium: STATBEL 2021
- Romania: World Bank 2020
- UK/South Korea: Digital Report 2020
- Morocco: OpinionWay Morocco 2020
- Egypt: Digital Report 2020
- Senegal/Ivory Coast: OpinionWay West Africa 2020
- Burkina/DRC: Digital report 2021 - Figures based on the population aged 15 and over

# Nevertheless, the proportion of individuals who never go online remains high\*



**Older  
Retired**



**Lower income**



**Problems  
mastering digital  
tools, which  
becomes a  
handicap**



**France**

**11%**



**Spain**

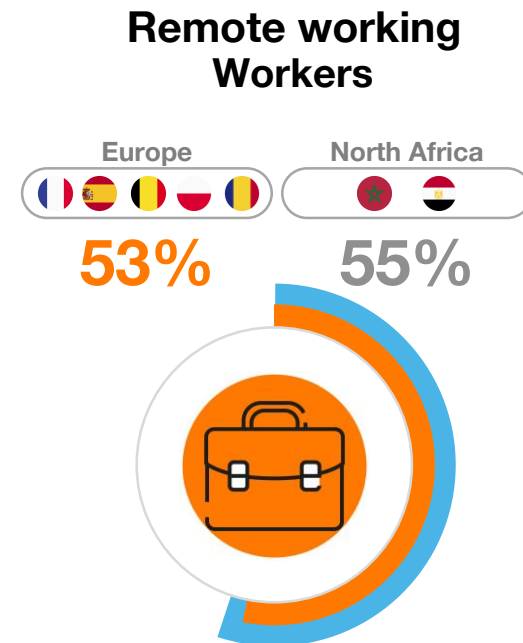
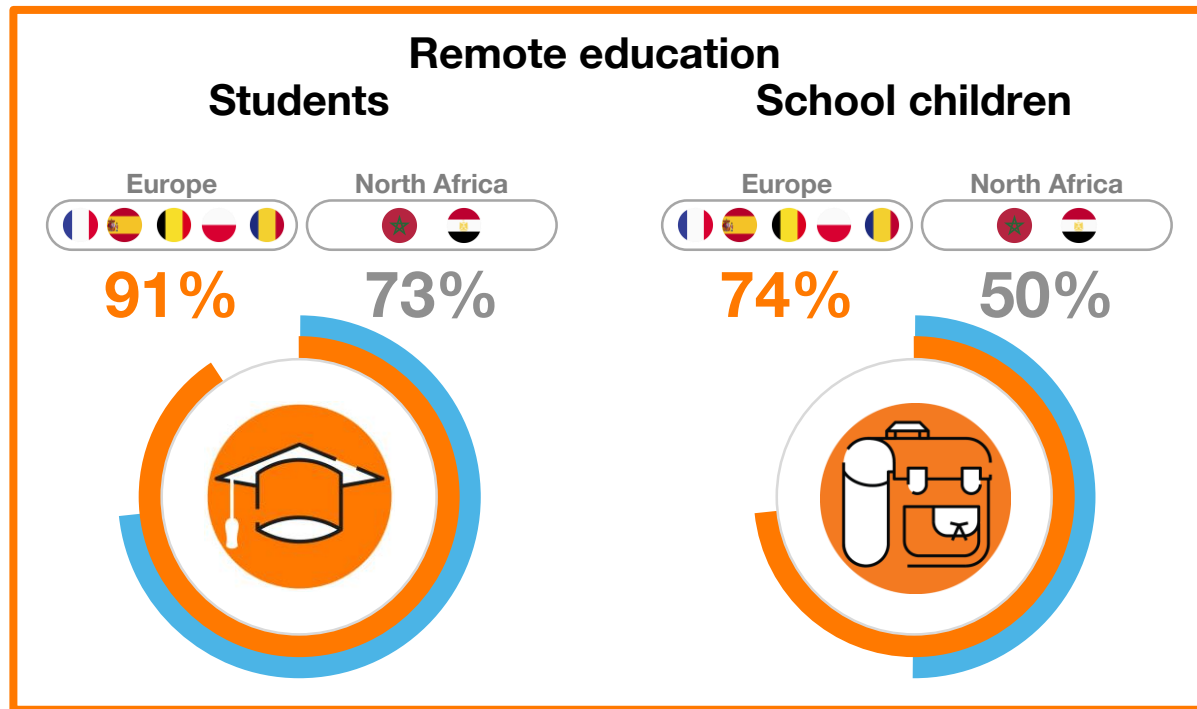
**7%**



**Poland**

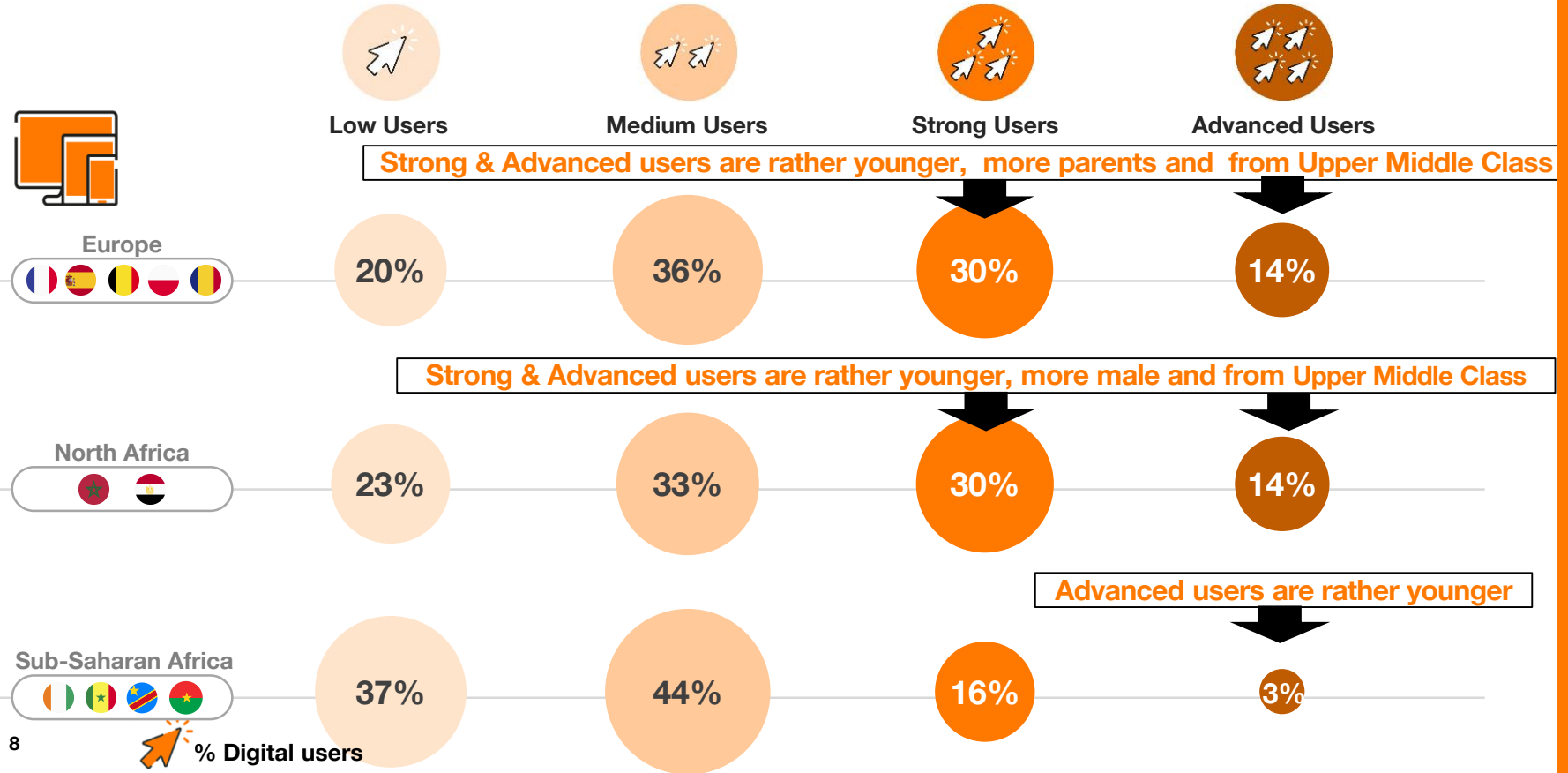
**10%**

# A generalization of remote education and working : an unprecedented situation for workers and families at home



Q18. What is your professional situation since the start of the health crisis? (Question asked to those who work)  
Q25. Did you or are you still following remote classes for your course? (Question asked to students)  
Q22. Did your children or are your children still remote online classes for school? (Question asked to those who have children)

# In Europe and North Africa, the proportion of the 4 profiles of user is relatively similar, contrary to Sub-Saharan Africa



Who are today's digital users?



# The most important benefits of digital tools



All regions

- 1 31% Allow you to keep in touch with friends and family
- 2 27% Allow you to be more open to the world
- 3 26% Make your everyday life easier

Europe



Make your everyday life easier

35%

Keep in touch with friends and family

31%

Allow you to save time

30%

2

1

3

North Africa



Allow you to be more open to the world

30%

Make your everyday life easier

27%

Keep in touch with friends and family

24%

2

1

3

Sub-Saharan Africa



Keep in touch with friends and family

36%

Allow you to be more open to the world

32%

Prevent you from getting bored

32%

2

1

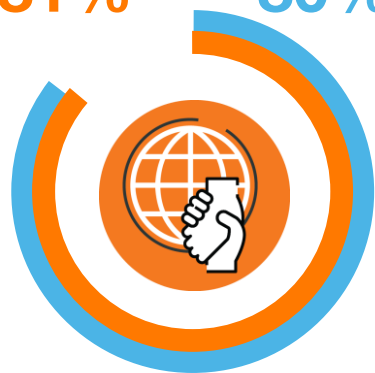
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Q6. Which of the following statements do you feel represent the most important benefits of digital tools?

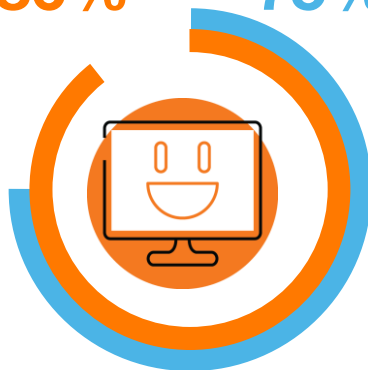
(Question asked to everyone - Orange euro5: 5780 / North Africa: 2080 / SSA: 4041 / UK: 1048 / SK: 1021)

# During this period, digital technology has clearly been a factor in maintaining social life in all its dimensions for the vast majority of individuals

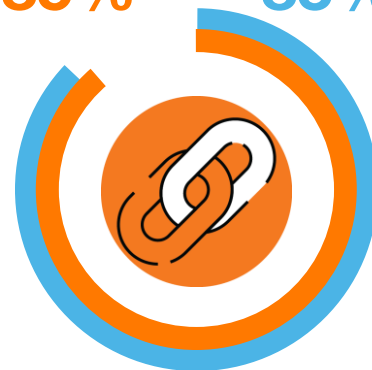
Internet and digital tools helped you to get through the period



Internet and digital tools helped you entertain yourself and relax

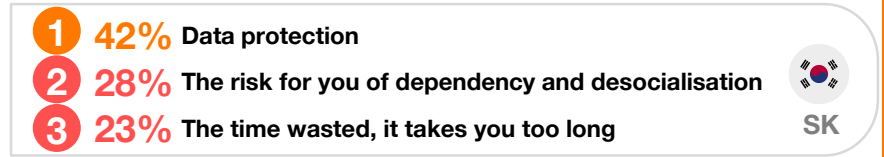
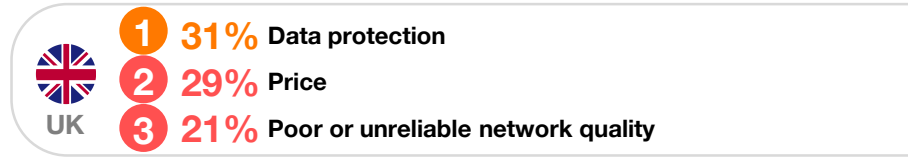
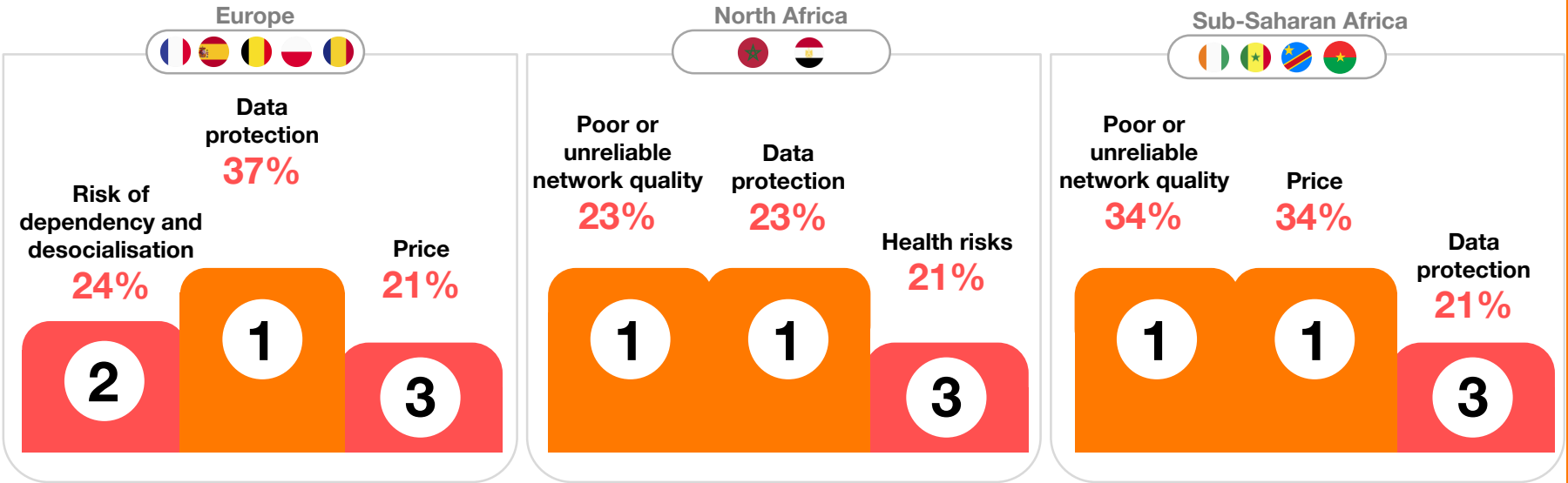


Digital tools allowed you to continue to see your family and friends



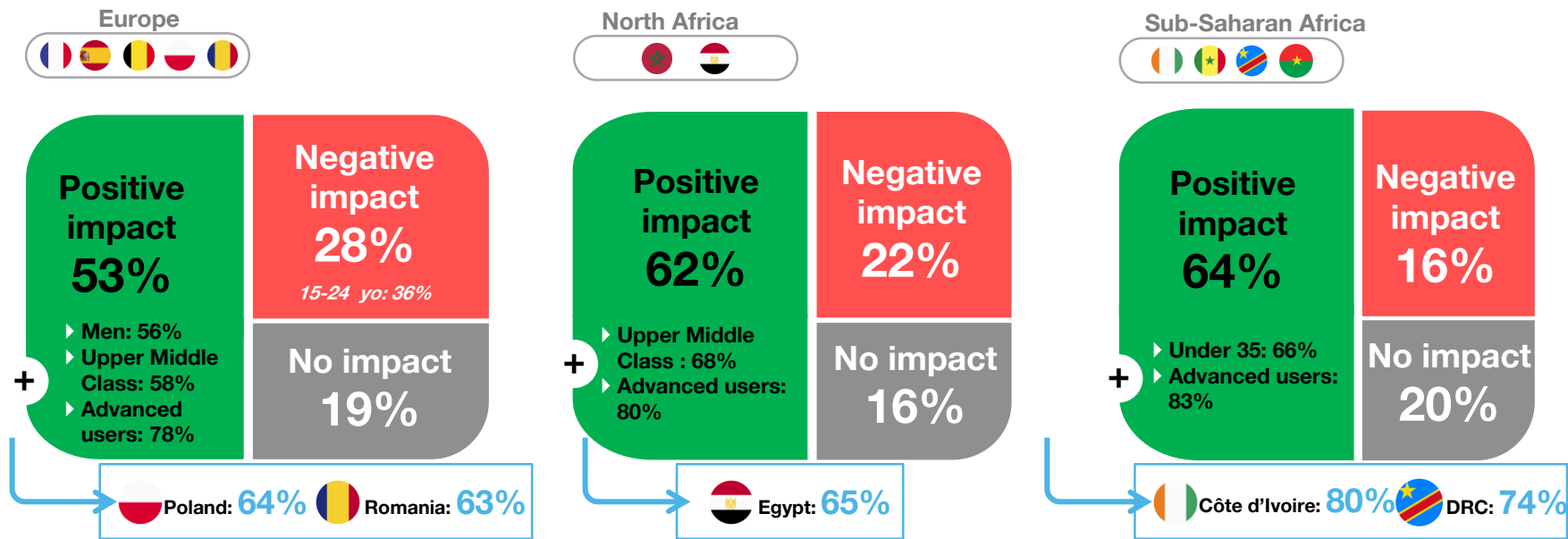
Q8. Would you say that since the start of the Covid-19 health crisis ...? (Question asked to all respondents)

# Among main obstacles to digital usage, data protection comes ahead in the Europe



Q7. For you, which of the following elements represent the greatest obstacles to using digital tools? (Question asked to all respondents – Up to 3 answers)

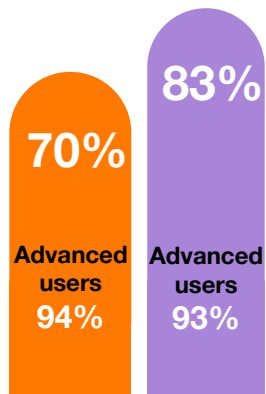
# A majority of people sees a positive impact of digital on the environment. However, the younger generation in Europe is more doubtful



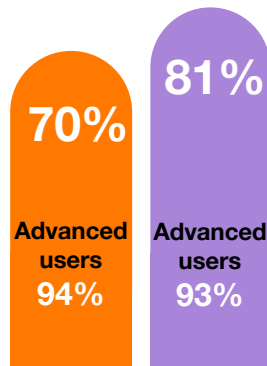
Q32 In general, would you say digital technology had a positive, negative or no impact on the environment? (Question asked to respondents)

# Very positive impact of digital on social issues and observation that the more advanced the user, the more their perception is positive

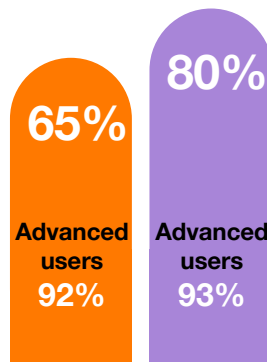
... to support the local economy



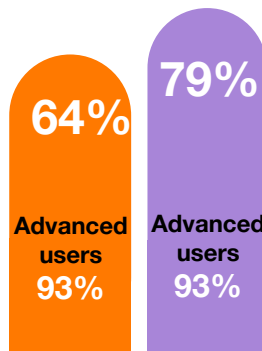
... to develop actions supporting the environment



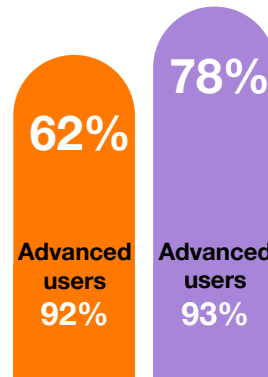
... to better manage energy consumption in your territory



... to develop solidarity (good relationships) between citizens

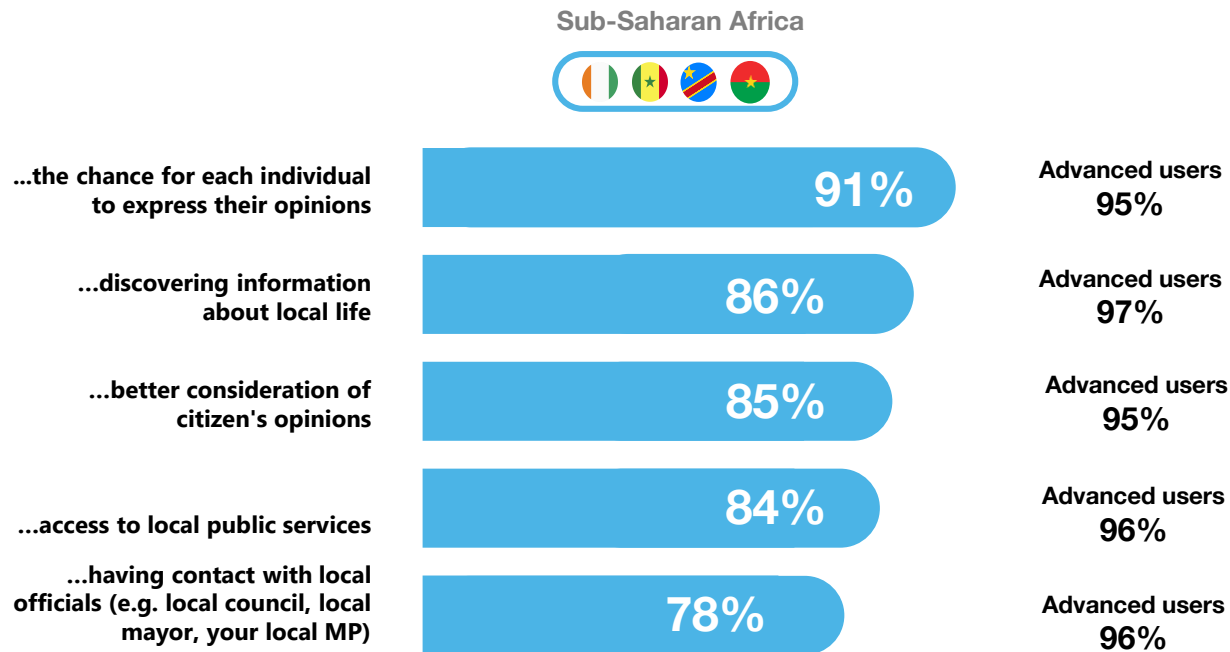


... to get more involved in the life of your area or neighbourhood (through local initiatives, via an association or an elected mandate...)



Q30. Would you say digital services help... ? (Question asked to all respondents)

# In Sub-Saharan countries, beyond the personal benefits, they acknowledge the positive impact of digital on society and even more for the most advanced users



Q31. Do you agree or disagree with each of the following statements? Digital technology is good for... (Question asked to all respondents)

**In short...**

**The intensification of uses has also led to a strong perception of the advantages of digital technology and its positive role in our societies**

# Thanks



*“opinionway*



# Definitions & conventions in this Observatory



**Digital users:** a digital user is defined, for that survey as individual who regularly practices at least....

<p>France, Spain, Belgium, Poland, Romania, United Kingdom, South Korea, Morocco, Egypt</p> <p><b>... 3 activities among these activities tested below</b></p>	<p>Ivory Coast, Senegal, Democratic Republic of Congo, Burkina Faso</p> <p><b>... 2 activities among these activities tested below</b></p>
<p>Making one or more purchases on the Internet</p>	
<p>Consulting a news or online media site (independent media, podcast), excluding social media</p>	
<p>Consulting social media</p>	
<p>Completing an administrative procedure on the Internet</p>	
<p>Using or purchasing an item or a service from another private individual over the Internet in exchange for payment</p>	
<p>Watching or downloading a film or a series</p>	
<p>Playing or downloading music</p>	
<p>Using specific videoconferencing services in a professional context such as Google Meet, Teams, Zoom, Skype, Webex, etc.</p>	
<p>Using a health app or site to participate in a remote consultation with a doctor</p>	
<p>Exchanging or sharing between private individuals, without remuneration, of goods or a service via the Internet</p>	
<p>Posting videos on a platform such as YouTube, Daylimotion, Twitch</p>	
<p>Booking a vaccination appointment online (via the NHS online or via your local doctor)</p>	
<p>Using a service such as WhatsApp, Skype, Hangouts, Viber, FaceTime, Messenger, etc.</p>	
<p>Watching videos on the Internet (Youtube, Dailymotion, Twitch, etc.)</p>	
<p>Playing or downloading a video game on the Internet or streaming platforms (free or paying)</p>	
<p>Consulting your bank account or completed a bank transaction on the Internet (via a mobile, a tablet, or a computer)</p>	
<p>Making a contactless payment with the Smartphone at stores</p>	
<p>Consulting a result of a medical examination online</p>	
<p>Making an appointment online with a doctor/healthcare professional</p>	

# Penetration rates of internet users and digital users are increasing in all countries



<b>Internet users ODU 2021*</b>	89%	93%	88%	90%	78%	96%	96%
<b>Internet users ODU 18/19</b>	86% <i>(2018)</i>	84% <i>(2018)</i>	<i>Not measured</i>	<i>Not measured</i>	<i>Not measured</i>	94% <i>(2018)</i>	90% <i>(2019)</i>



<b>Digital users ODU 2021</b>	82%	88%	87%	85%	75%	93%	93%
<b>Digital users ODU 18/19</b>	75%	72%	<i>Not measured</i>	<i>Not measured</i>	<i>Not measured</i>	90%	86%



62%	54%	62%	56%	40%	44%
58% <i>(2018)</i>	44% <i>(2019)</i>	62% <i>(2019)</i>	47% <i>(2019)</i>	<i>Not measured</i>	<i>Not measured</i>



55%	49%	51%	48%	39%	41%
38%	43%	43%	44%	<i>Not measured</i>	<i>Not measured</i>

**\*Sources :**

- France/Spain/Poland : ODU 2021
- Belgium: STATBEL 2021
- Romania: World Bank 2020
- 18. UK/South Korea: Digital Report 2020

- Morocco: OpinionWay Morocco 2020
- Egypt: Digital Report 2020
- Senegal/Ivory Coast: OpinionWay West Africa 2020
- Burkina/DRC: Digital report 2021 - Figures based on the population aged 15 years and over