

Observatory of digital uses 2021

Focus on digital maturity and usages dynamics

3rd edition



“opinionway

Summary

- 1 Introduction**
- 2 A global increase of digital users during the crisis**
- 3 Stronger usages, and new expectations in terms of connectivity and equipment**
- 4 Along with connectivity, major concerns arise together with stronger usage**
- 5 After this intensive digital immersion, which services with strongest appeal will stand out in the future ?**

1

Introduction

Objectives and methodology


What is the Observatory of Digital Uses 2021?



The 3rd 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 including 11 Orange countries, 16,986 interviews

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

7 to 26 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. 11 countries where Orange operates)



Online and telephone interviews



16 June to 15 October 2021

2

**A global increase of digital users
during the crisis**

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

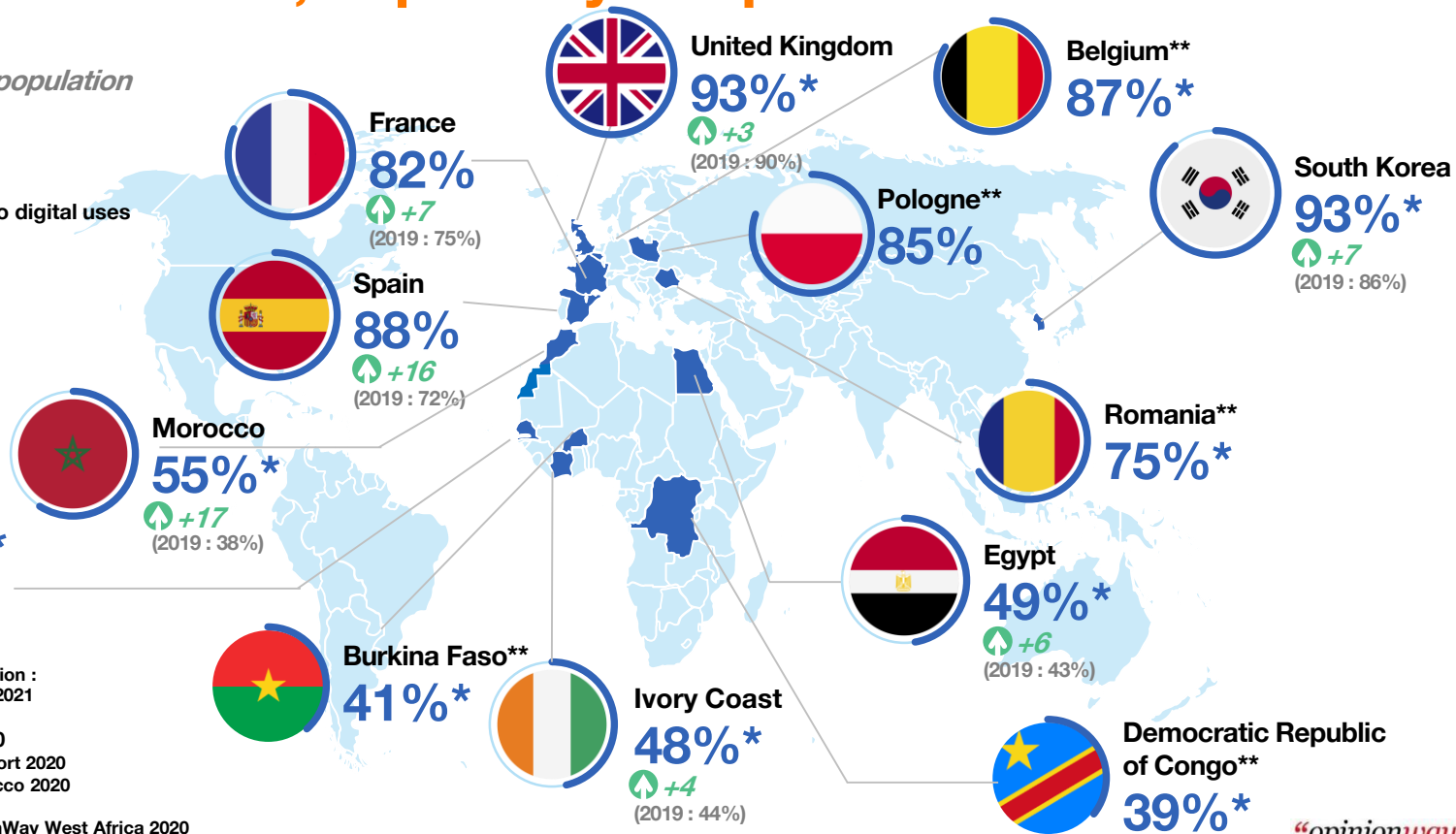
 **% Digital users**
(among national population over 15yo)

 Evolution vs 2019

Digital users : at least two digital uses

* Source : OpinionWay

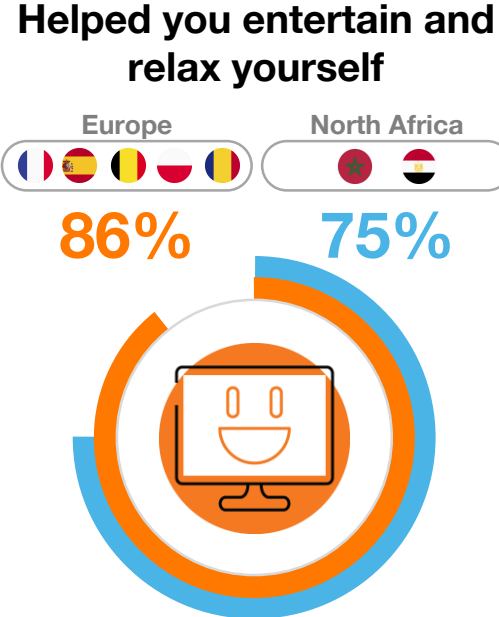
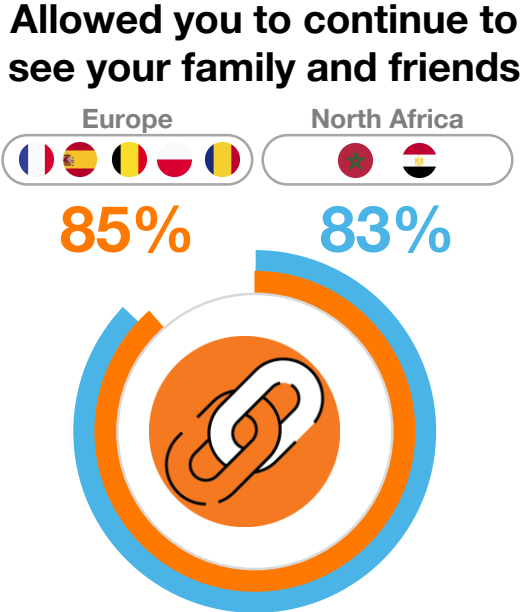
**Not measured in 2019



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

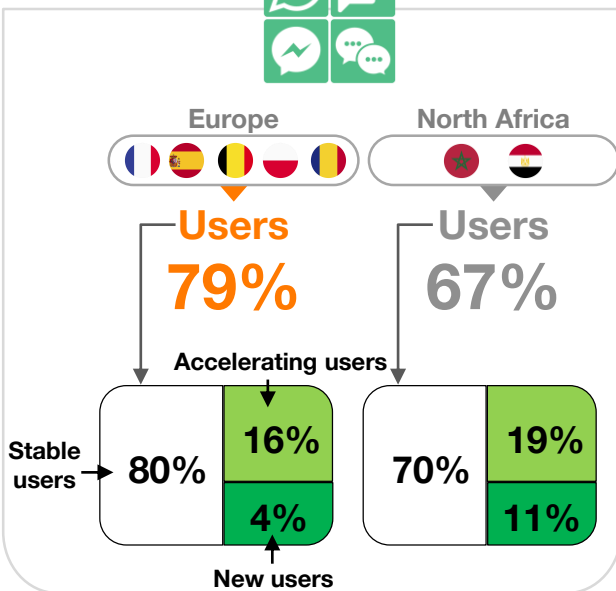
During these periods of confinements, curfews and isolation, digital has fully positioned itself as an essential and positive ally



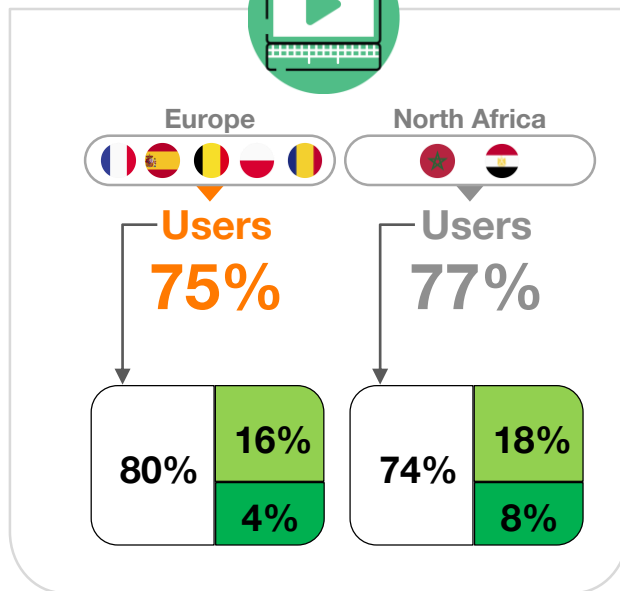
Q8. Would you say that since the start of the Covid-19 health crisis, digital tools.... (Question asked to everyone - Orange euro 5: 5780 / North Africa: 2080)

Increase in messaging tools driven by more intensive usage and video calls brought many newcomers

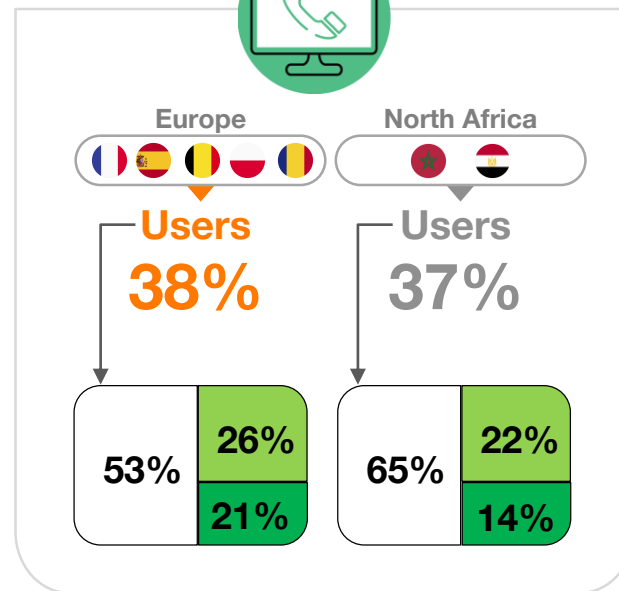
Messaging tools (whatsapp and co)



Watching videos on the internet



Videocall with family and friends

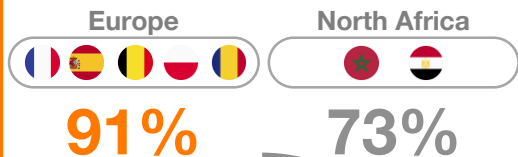


Q1/Q1bis. Which sentence best describes the current situation? (Question asked to everyone - Orange euro 5: 5780 / North Africa: 2080)

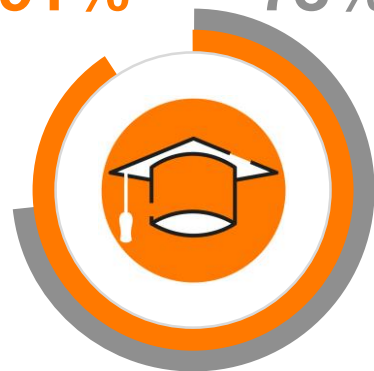
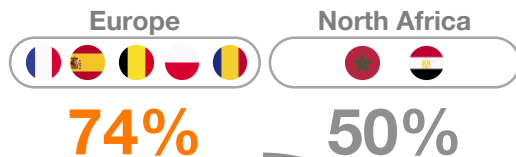
A generalization of remote education and working : an unprecedented situation for workers and families at home

Remote education

Students

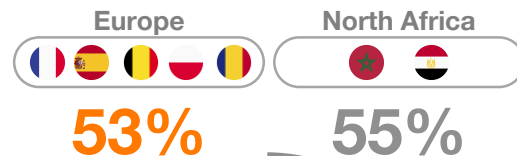


Children in scholarship



Remote working

Workers



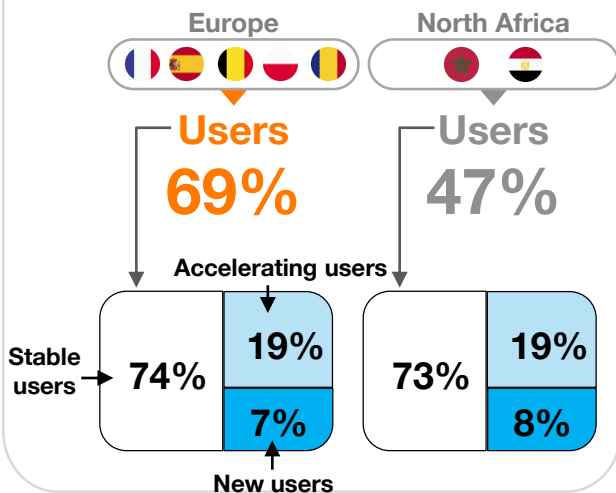
Q18. What is your professional situation since the start of the health crisis? (Question asked to those who work)

Q25. Did you or are you still following remote classes for your course? (Question asked to students)

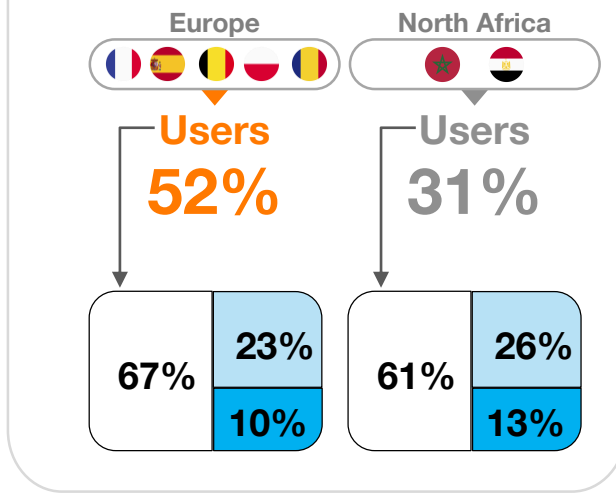
Q22. Did your children or are your children still remote online classes for school? (Question asked to those who have children)

Digital solutions for everyday life : online retail has also strongly reshaped the landscape

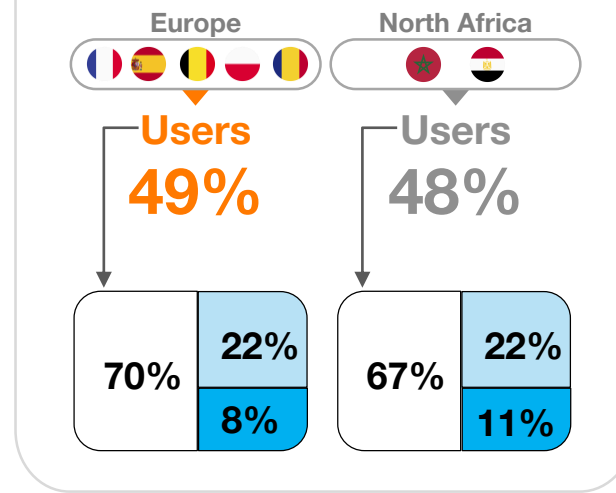
Purchases delivered At home



Click and collect



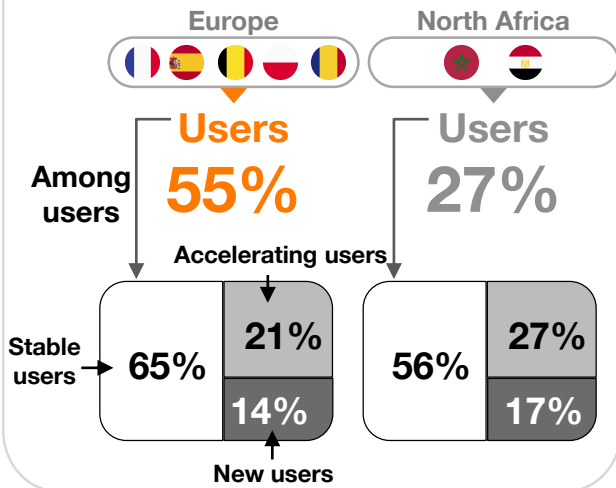
Contacting a store via social media



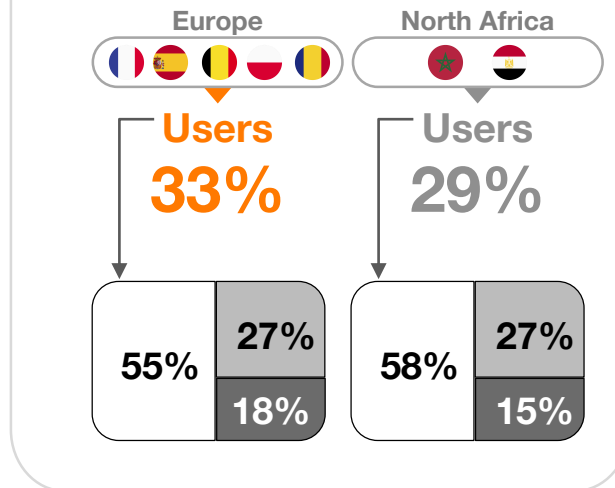
Q1/Q1bis. Which sentence best describes the current situation? (Question asked to everyone - Orange euro 5: 5780 / North Africa: 2080)

Digital health services : a new experience for many

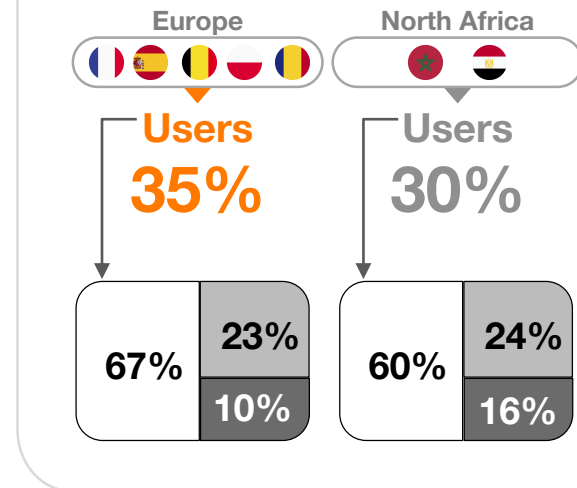
Appointment online with healthcare professional



Remote consultation

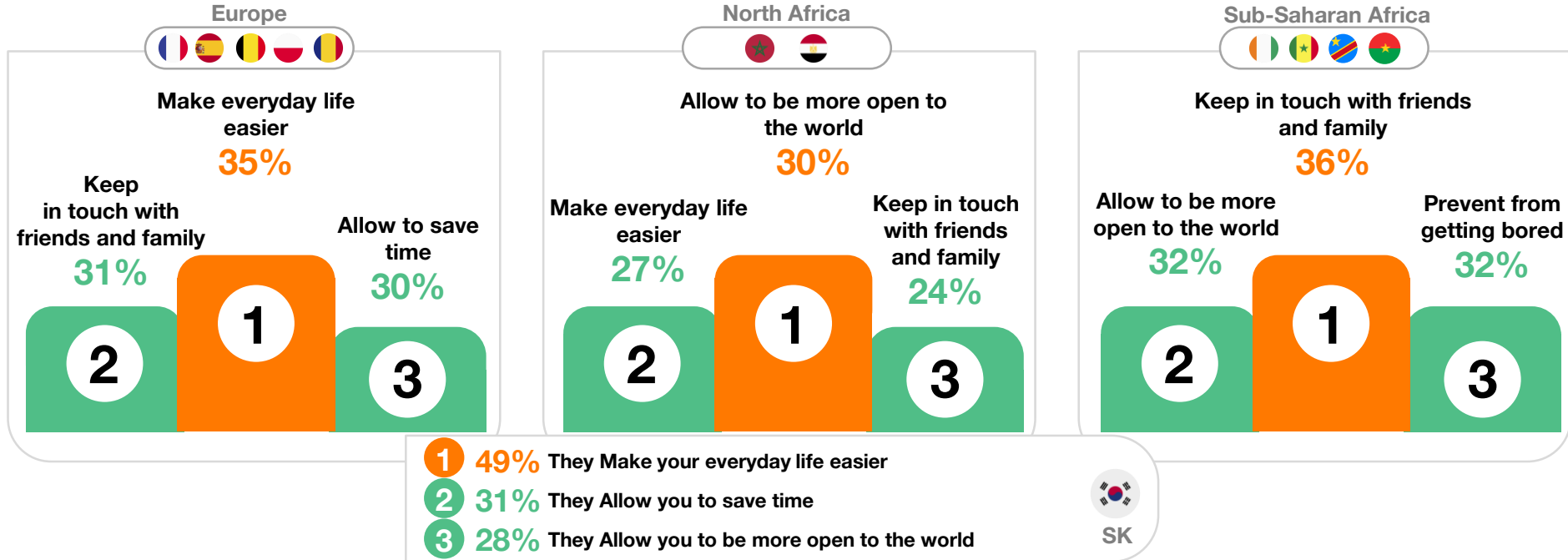


Healthcare app or website



Q1/Q1bis. Which sentence best describes the current situation? (Question asked to everyone - Orange euro 5: 5780 / North Africa: 2080)

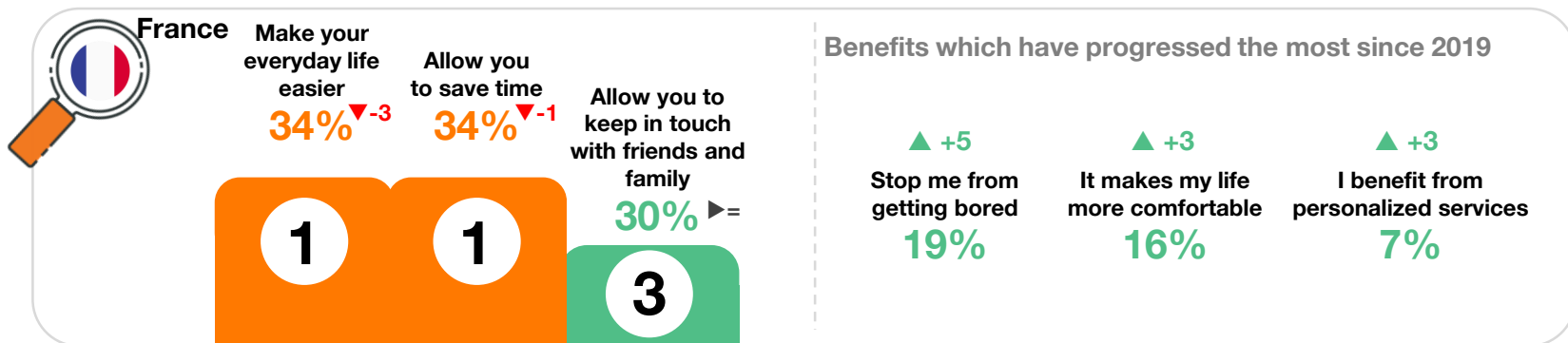
Main benefits perceived : remaining connected to the world and each other, using digital services which facilitate everyday life



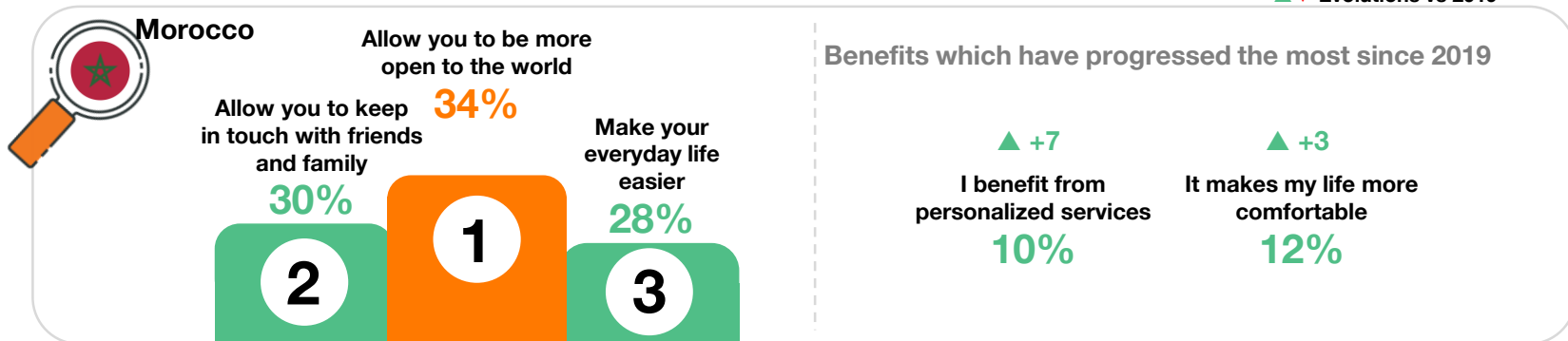
Q6. Which of the following statements do you feel represent the most important benefits of digital tools?

(Question asked to everyone - Orange euro 5: 5780 / North Africa: 2080 / SSA: 4041)

Major benefits remain broadly stable compared to 2019



▲ ▼ Evolutions vs 2019



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

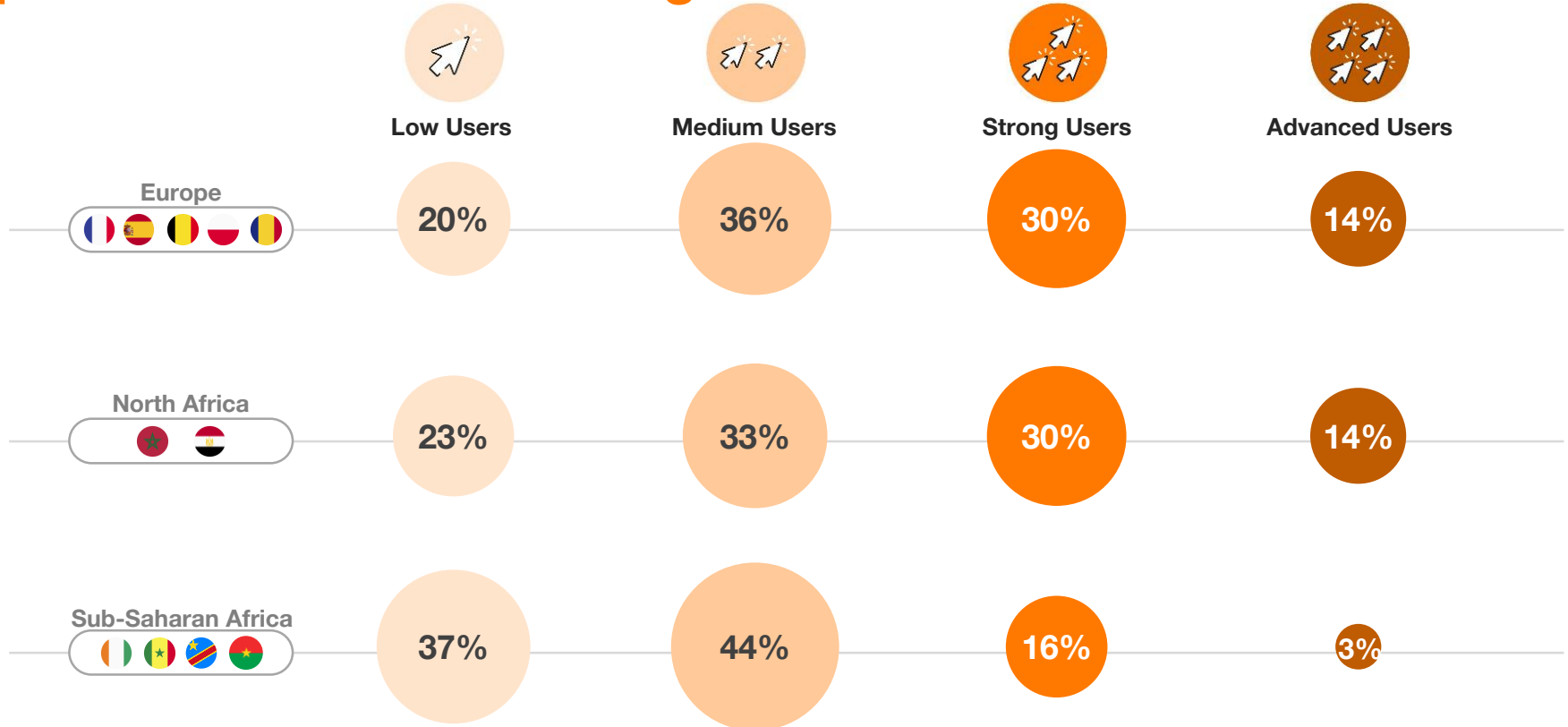
(Question asked to everyone - France: 1146 / Morocco: 1073)

Different groups of digital users according to uses number and digital skills.

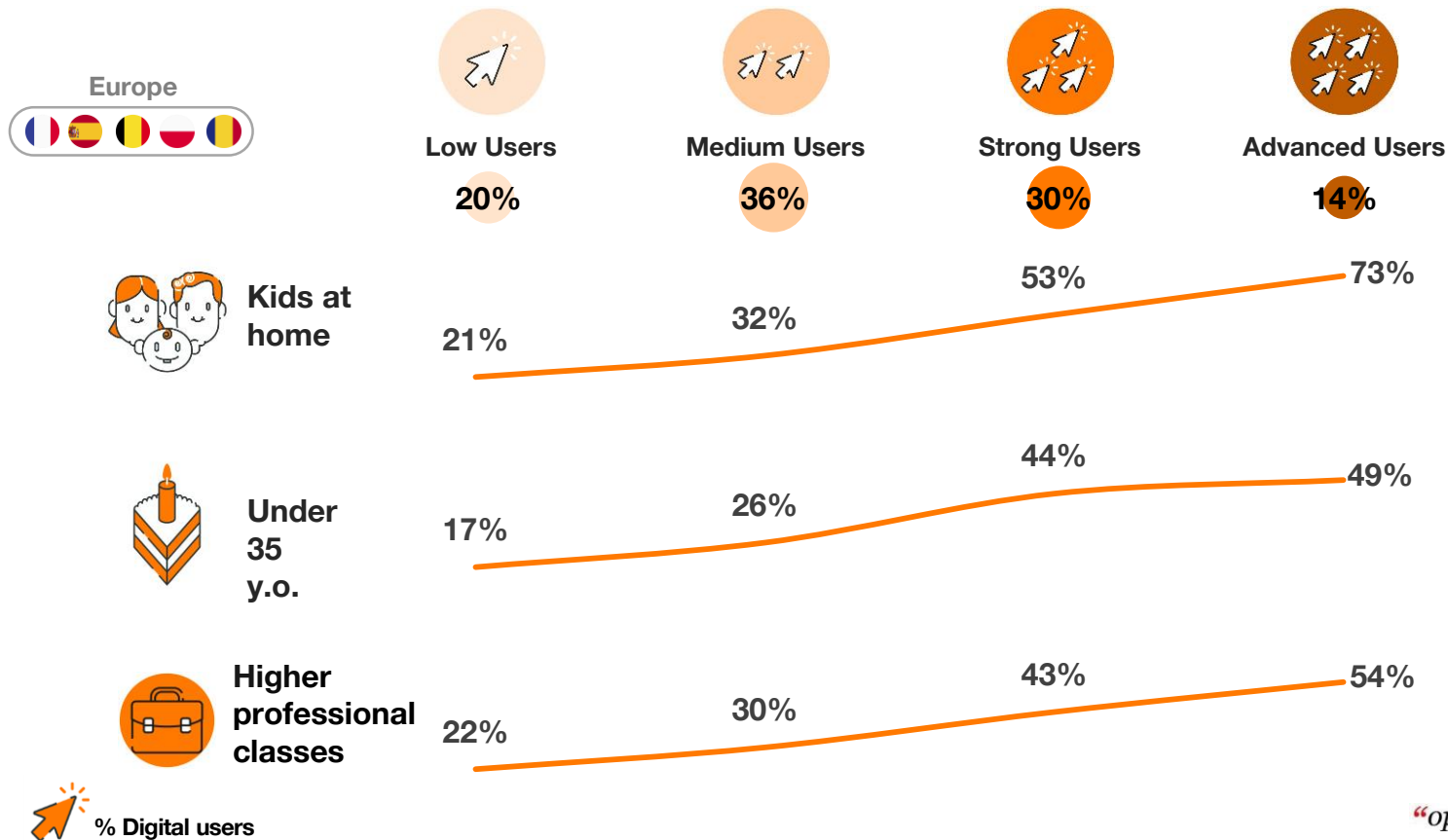
A digital evolution along with a positive perception of digital technology.

But different dynamics of appropriation revealing strong digital inequality.

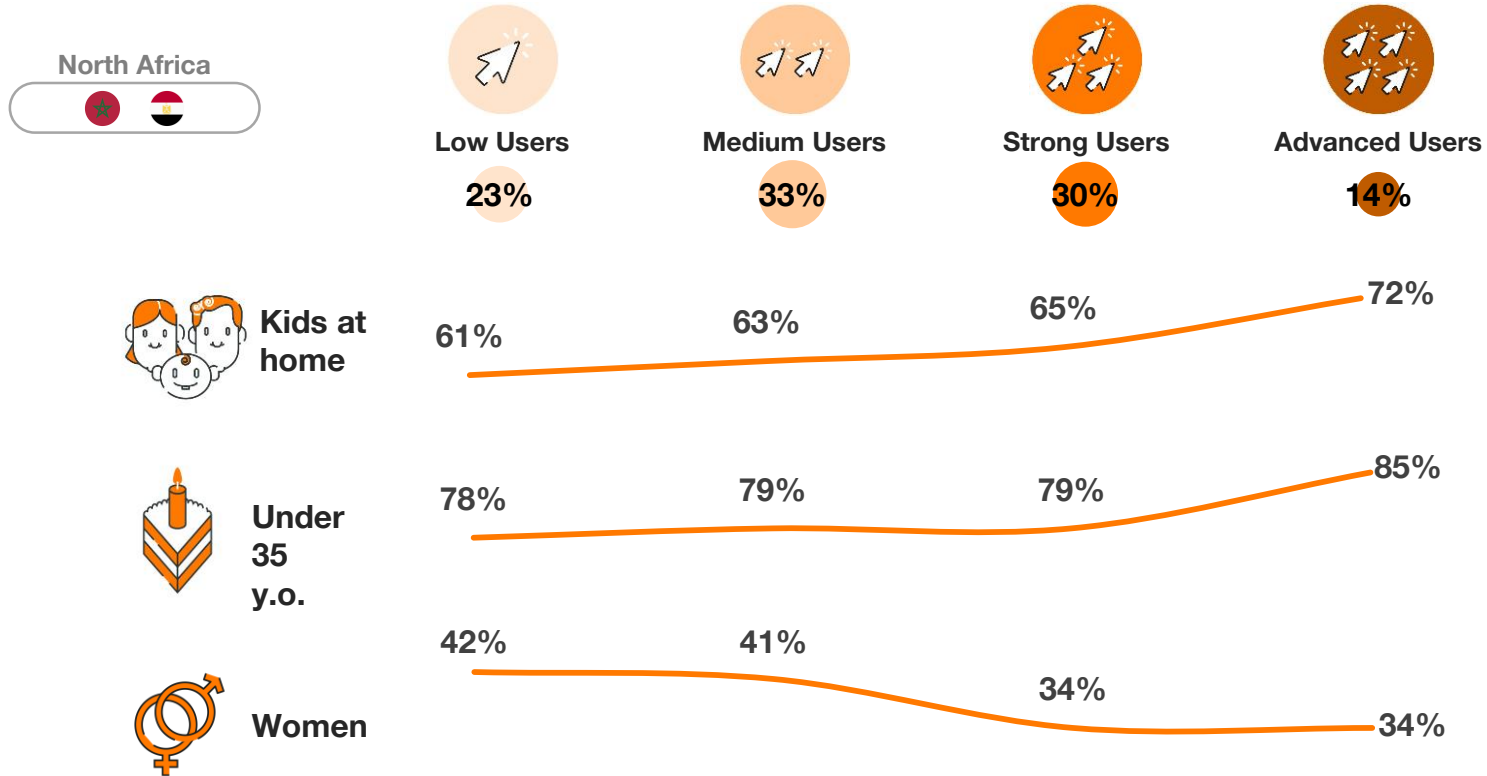
4 distinctive groups of digital users, with specific profiles and relation to digital



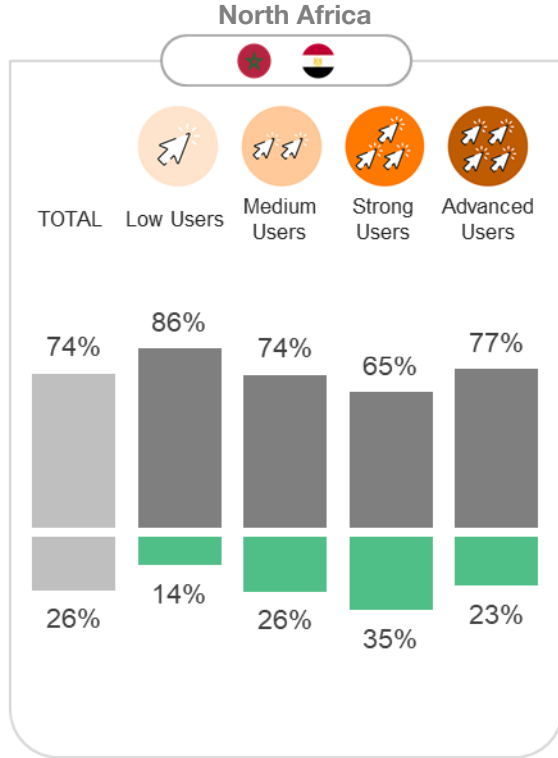
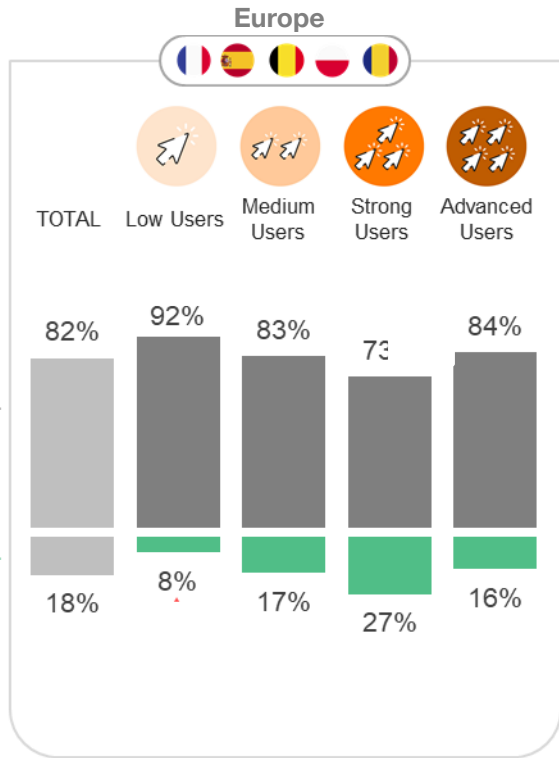
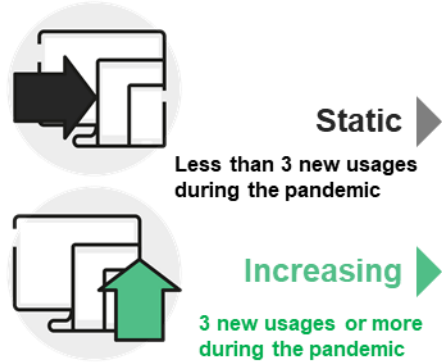
Kids at home the strongest digital accelerator for adults beside being young (and wealthy)!



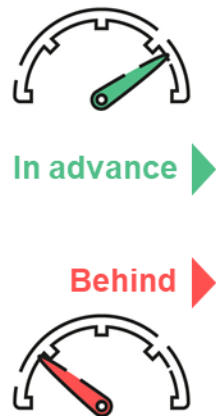
Woman are strongly behind men in terms of digital maturity in North Africa



During the 2020-2021 pandemic, low users were few to widen their scope of digital usages

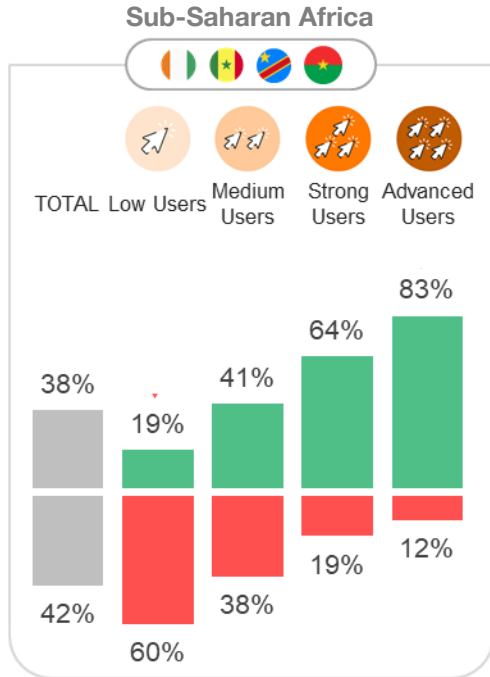
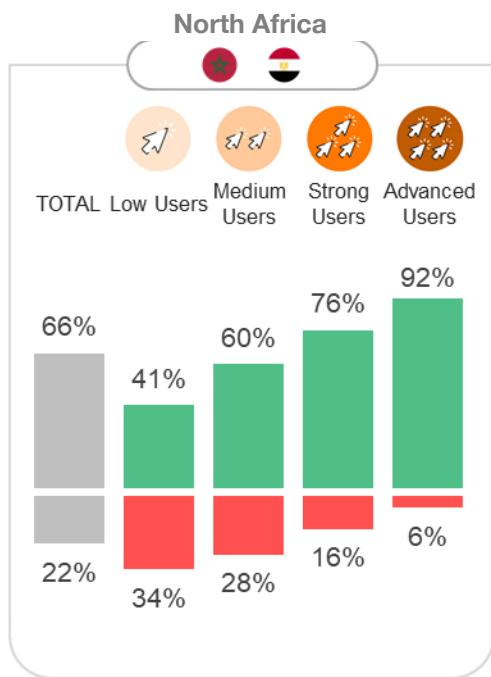
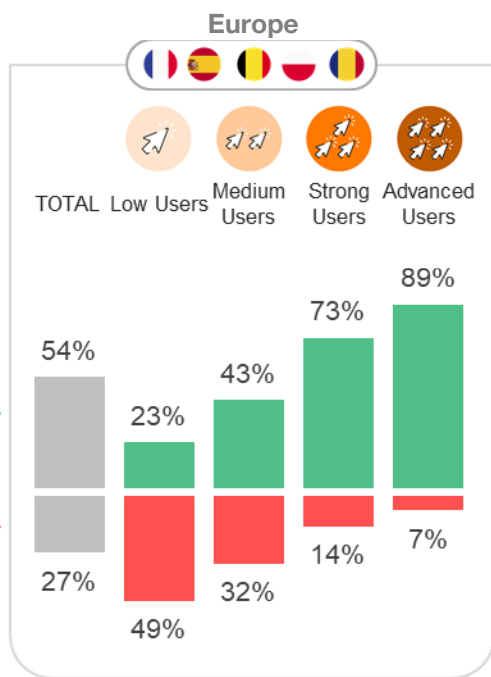


Low and Medium users, feeling left well behind



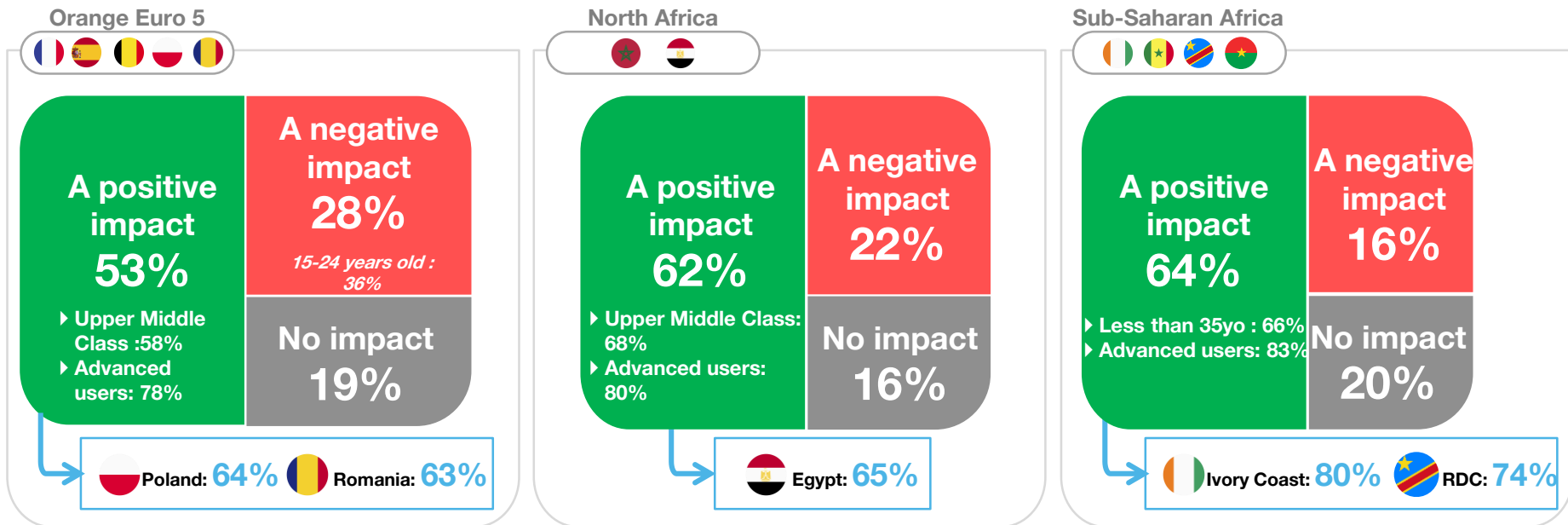
In advance

Behind



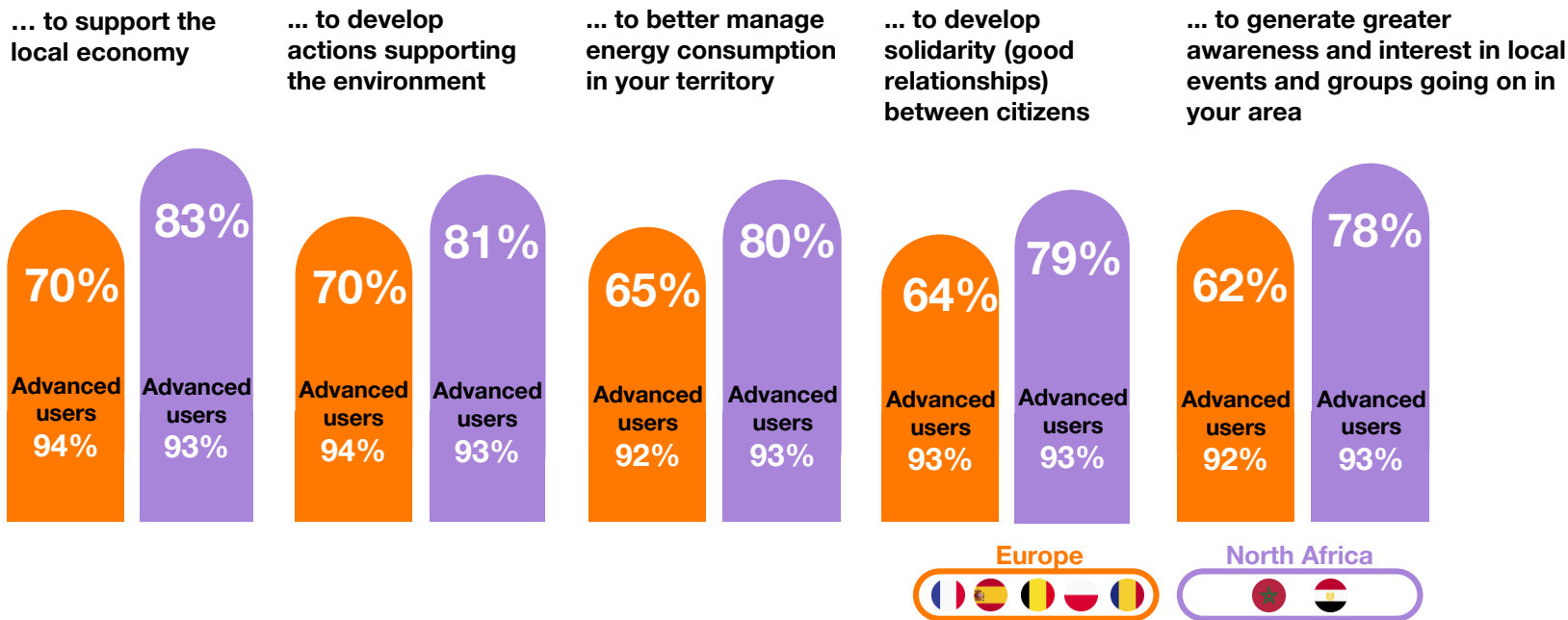
Q3. Concerning the use of digital tools, namely all the practices we have just mentioned, do you personally feel advanced or behind compared to your family and friends? (Question asked to everyone - Orange euro 5: 5780 / North Africa: 2080 / SSA: 4041)

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



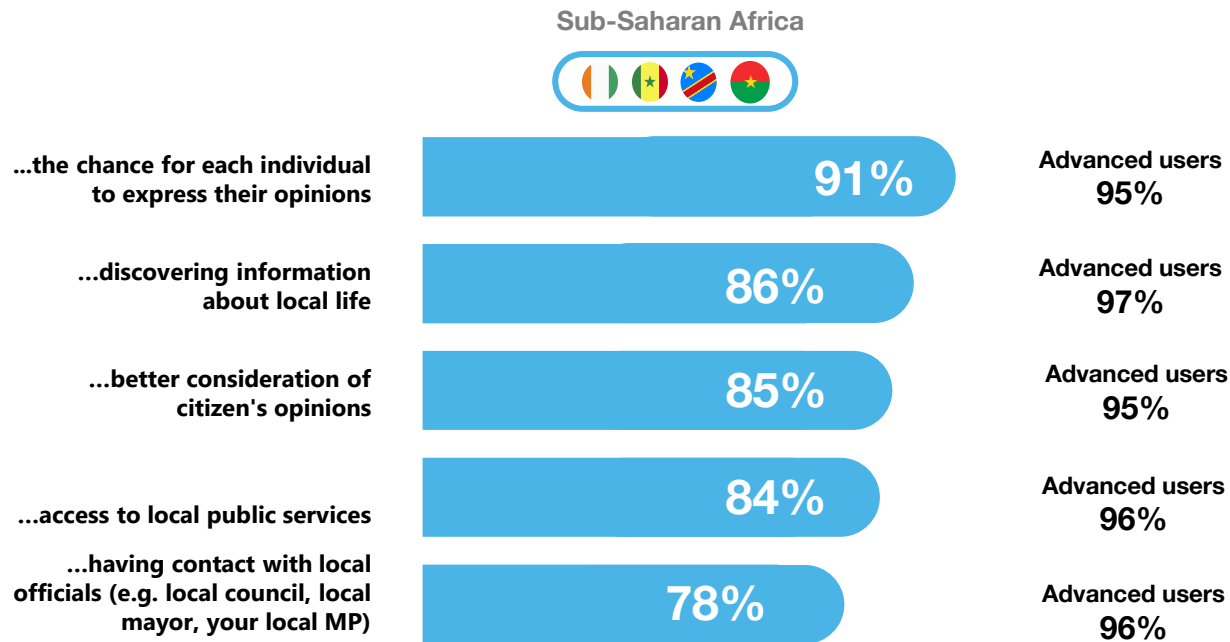
Q32. In general, would you say that, today, digital technology has a positive, negative or no impact on the environment? (Question asked to everyone - Orange euro 5: 5780 / North Africa: 2080 / SSA: 4041)

Very positive impact of digital on social issues : the more advanced the user, the more their perception is positive



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

In Sub-Saharan countries, 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)

3

Stronger usages, and new expectations for digital users in terms of connectivity and equipment

Connection difficulties during the period and shared use were often a source of conflict, especially with children



34% → Families with kids at home: 47%

have experienced a **slow Internet connection** at home



43% → Families with kids at home: 51%

have experienced **tensions between family members** directly caused by connection issues



66%



46% → Families with kids at home: 49%

Q14. Did you ever experience a slow Internet connection because several people in the household were connecting devices at the same time? (all respondents)

Q15. Did this create tensions between the members of your household? (Question asked to those who experienced slow Internet connection)

Experiencing working remotely has also crystallised need for optimized connectivity

Strong expectations from remote workers for a better Internet connection



Q21. What do you need to work better at home? (Question asked to those who work remotely)

Usage intensification within households during the pandemic let to numerous actions for optimizations...

Find solutions to improve your WiFi connection at home

Europe



31%

North Africa



56%

Increase the bandwidth of your home Internet connection

Europe



27%

North Africa



53%

Increase the amount of data in your mobile subscription

Europe



29%

North Africa



54%

Take out a new mobile subscription for yourself or someone in your household

Europe



26%

North Africa



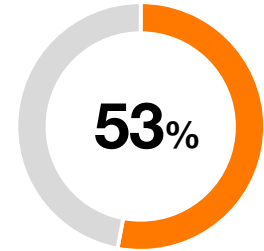
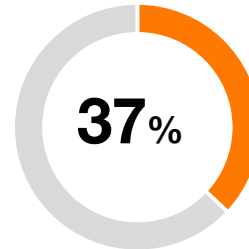
45%

Q12. Because of the health crisis have you had to ...? (Question asked to everyone - Orange euro 5: 5780 / North Africa: 2080)

...Furthermore, the level of equipment and re-equipment during the pandemic was high, especially among digital users in North Africa



Purchase of a new device, whether a computer, a tablet, or a telephone during the Covid crisis



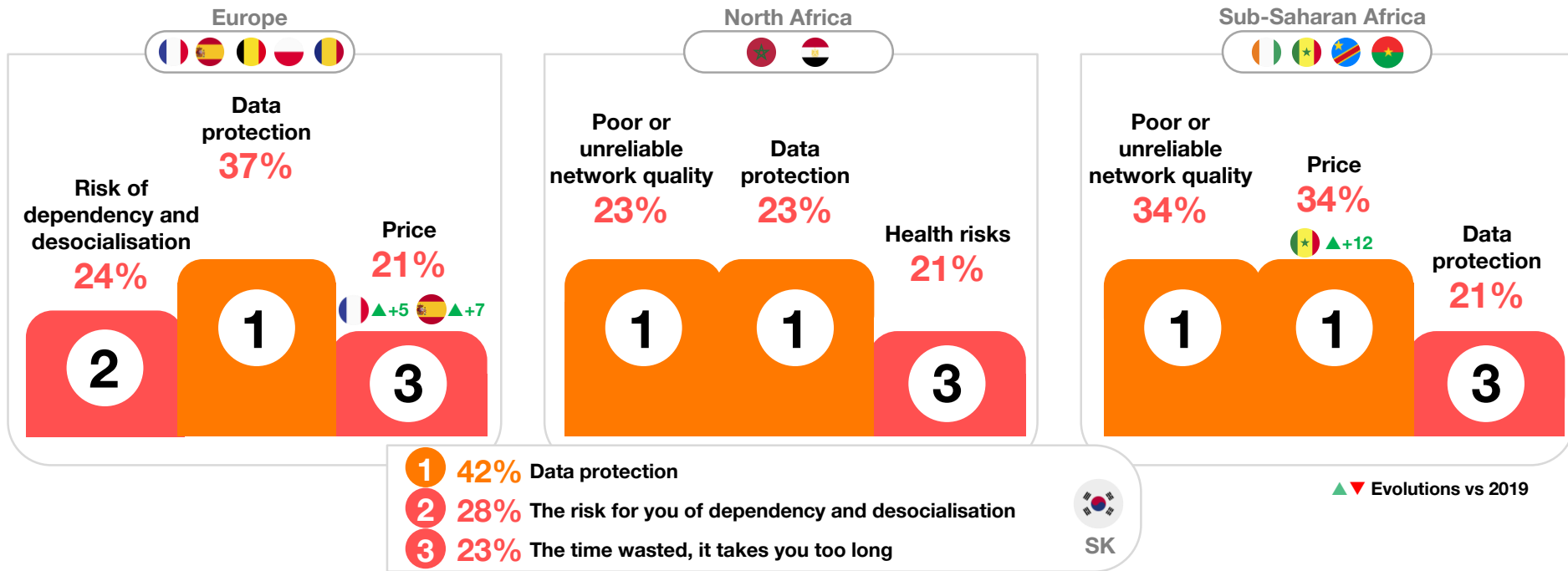
→ Families with kids at home: 51%

Q12. Because of the health crisis have you had to ...?

4

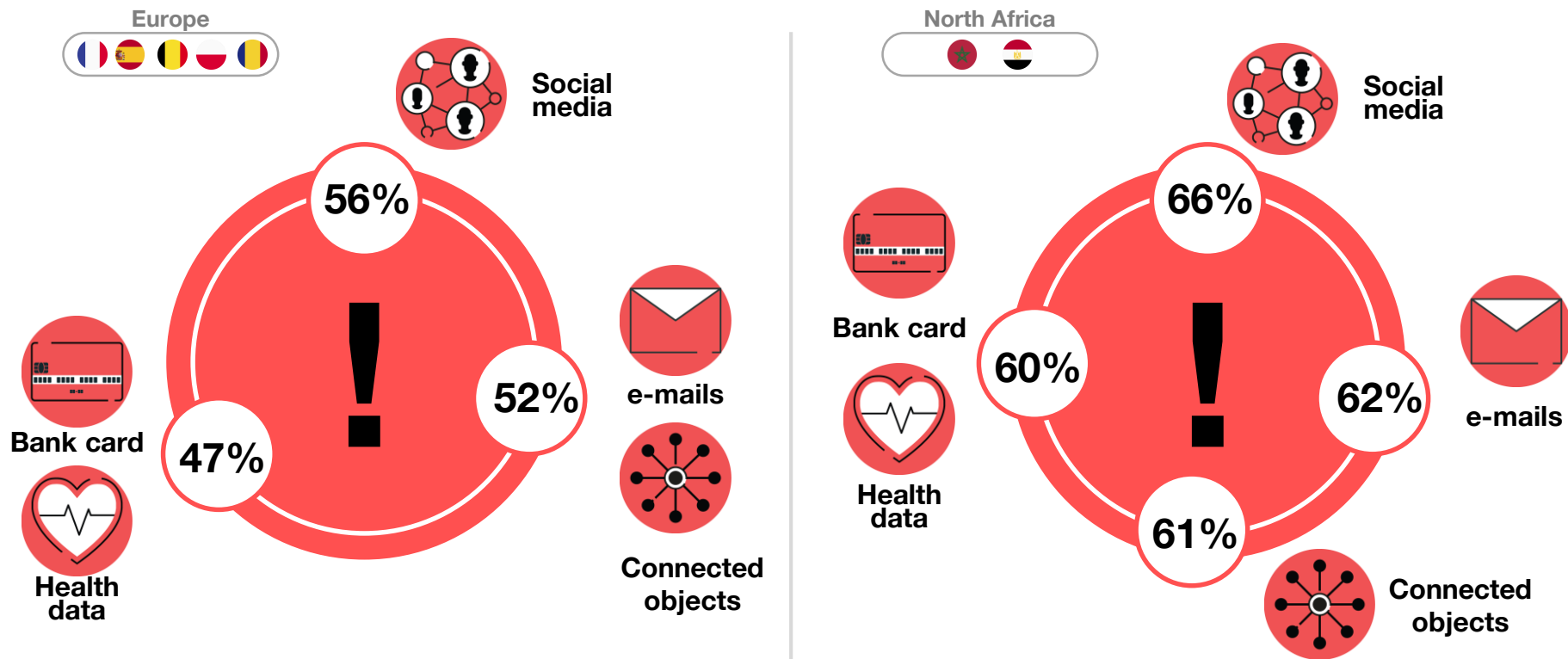
Along with connectivity of digital users, major concerns arise together with stronger usage

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



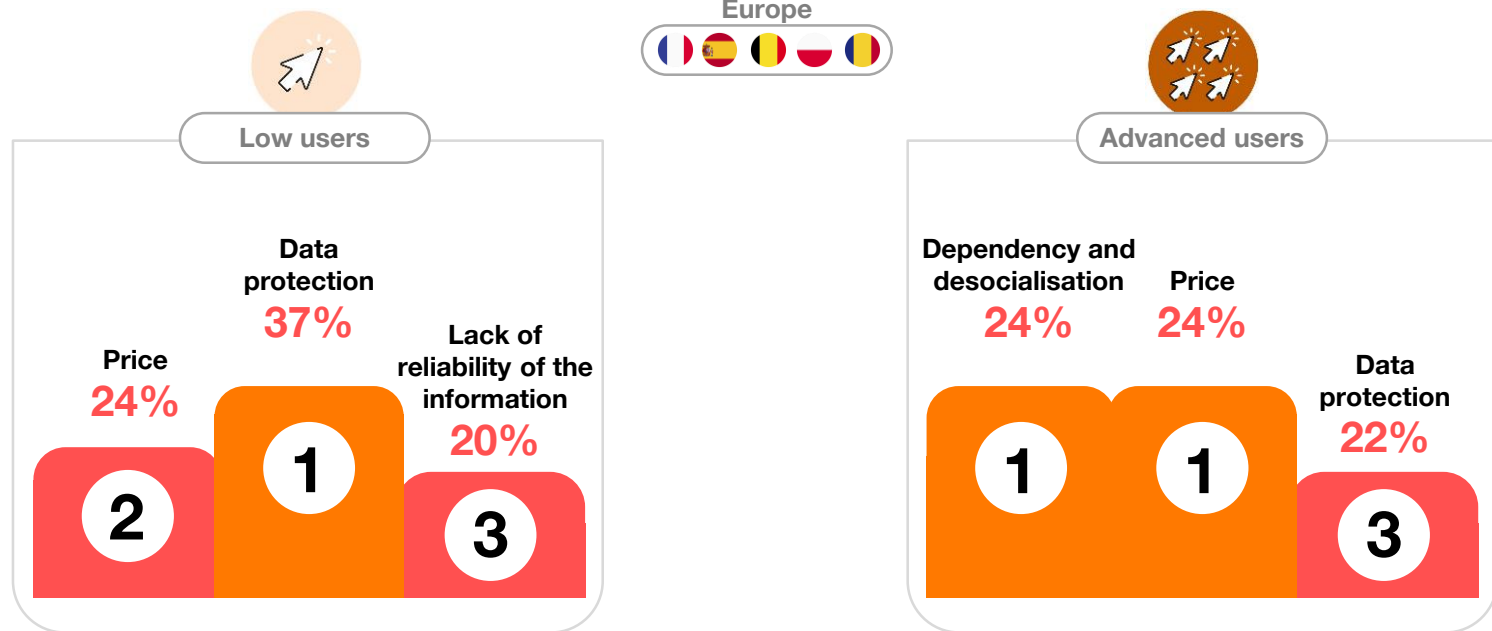
Q7. For you, which of the following elements represent the greatest obstacles to using digital tools?
 (Question asked to everyone - Orange euro 5: 5780 / North Africa: 2080 / SSA: 4041 / SK: 1021)

A majority of European and northern African say they don't feel enough protected when using...



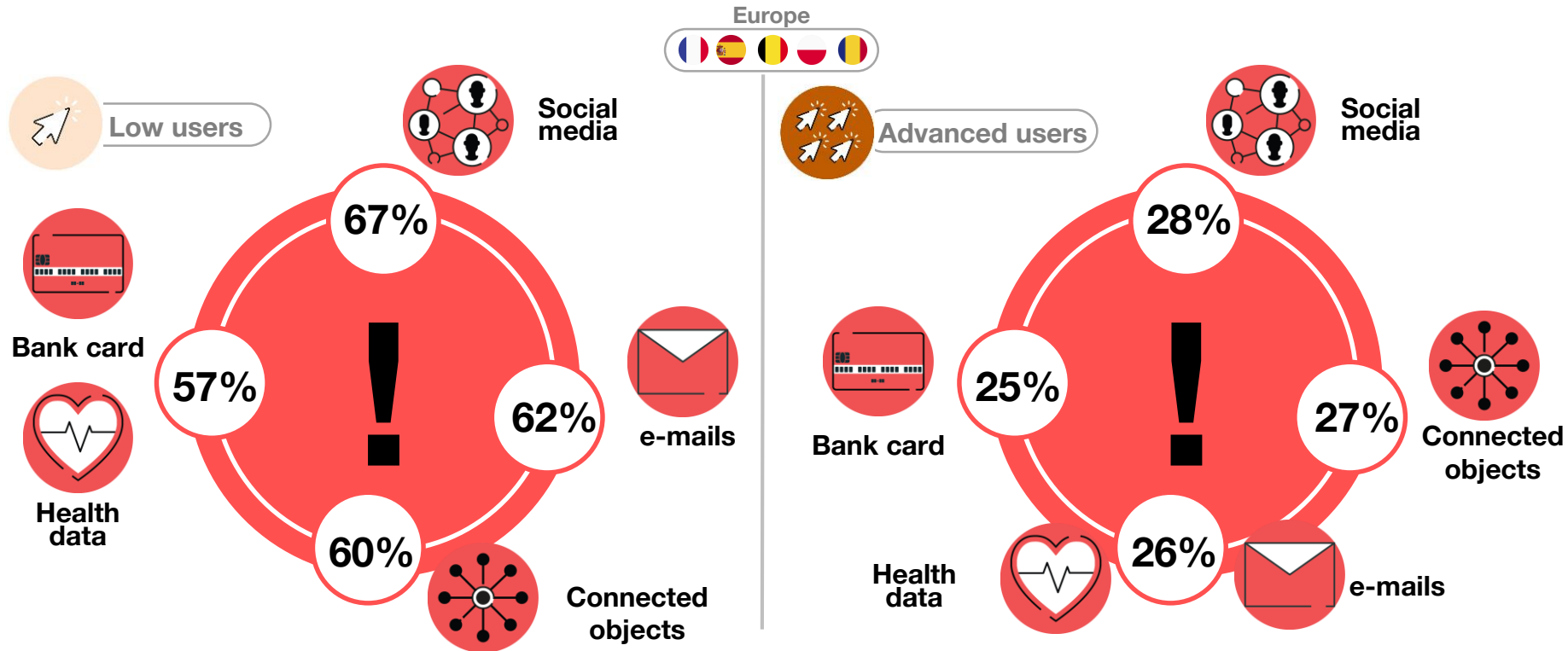
Q38. Do you feel sufficiently protected or not against each of the following situations? (Question asked to all respondents)

In Europe, data protection is an important barrier for low users, as dependency and price are for the advanced



Q7. For you, which of the following elements represent the greatest obstacles to using digital tools?
(Question asked to everyone - Orange euro 5: 5780)

In Europe, low users are generally more anxious, especially when it comes to social networks



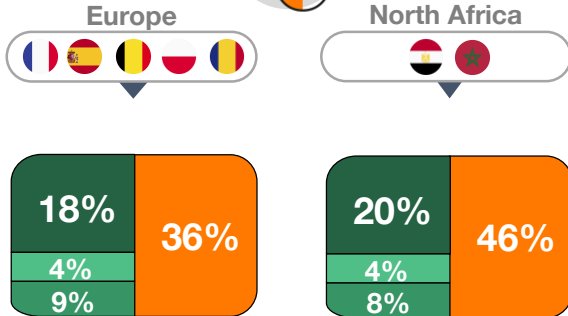
Q38. Do you feel sufficiently protected or not against each of the following situations? (Question asked to all respondents)

5

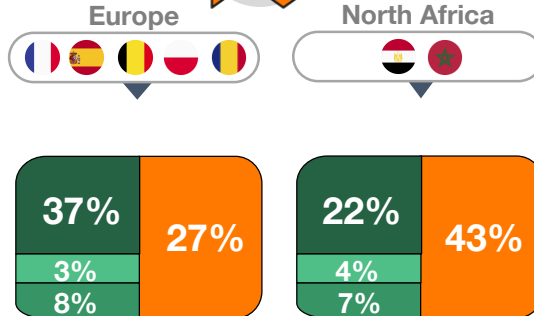
**And opens up future prospects for
some digital services.**

Smart cities: numerous services with high adoption potentials

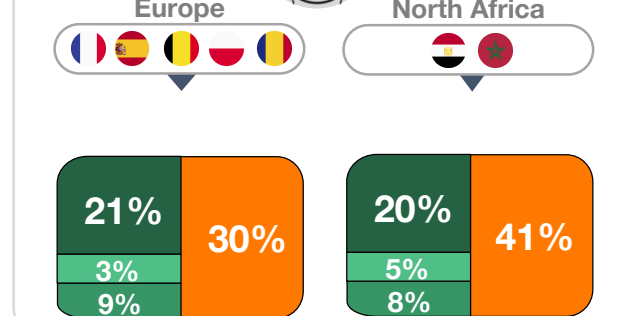
Making virtual cultural visits



Using an app for traffic updates, e.g. delays and roadworks



Exchanging or sharing between private individuals, without remuneration, of goods or a service via the Internet



- Stable usage since the pandemic
- Usage acquired with the pandemic

- More intense usage since the pandemic
- Interested but non user

Q2. For each of the following uses, tell me if you were already doing it before the Covid health crisis or if you were not doing it? (Question asked to all users, recalculated on total sample)

In a nutshell

Intensive digital usages generating higher needs in connectivity

Significant pressure on connectivity within households, especially those with children.

Increased use of video and remote activities, which here again saturates the home network,

A high level of equipment and re-equipment during the pandemic, increasing needs of high connectivity and data

Increasing needs but increasing pressure on the cost of service.

A situation under constraint, which acted as a strong accelerator

Digital technology at the service of individuals during the pandemic, a lifesaver recognized as such,

Massive intensification of videocalls, remote educational and work solutions, e-retail , entertainment & sociability during the pandemic

A development of uses among novice and low users which requires strong digital support in order for them to gain confidence.

An innovative future with promising opportunities

E-health services have benefited from a strong boost, and people see these solutions as the most promising in the future

Smart city services also rank among strongest potentials, embracing citizens to interact with their environment

Augmented experience (virtual visits, augmented reality)

Enhanced conversational modes (chatbot, voice assistants).

Thank you



“*opinion*way”

Definitions & conventions in this Observatory



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

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

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

 France
  Spain
  Belgium
  Poland
  Romania
  UK
  South Korea

Internet users ODU 2021*	89%	93%	88%	90%	78%	96%	96%
Internet users ODU 18/19	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>

 France
  Spain
  Belgium
  Poland
  Romania
  UK
  South Korea

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

 Morocco
  Egypt
  Senegal
  Ivory Coast
  DRC
  Burkina Faso

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>

 Morocco
  Egypt
  Senegal
  Ivory Coast
  DRC
  Burkina Faso

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
- 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