

Observatory of digital uses

Edition 2019

Thanks



Béatrice Mandine

Executive Director Communications
and Brand



Technology uses - towards the age of reason?

The digital revolution offers a great opportunity for socio-economic development as it continues to impact our lifestyles and consumer habits.

To better understand the subject and how it affects us, and to share our thinking, Orange produced the first “Observatory of digital uses” in 2018.

The point of the study was not to draw up an exhaustive list of digital uses, but rather to try and put how consumers are using technology into perspective.

This year, we’ve chosen to address the topics that are central to people’s concerns about this profound transformation: trust, dependence and disconnection, e-inclusion, citizenship and environmental impacts.

Highlighting behaviours and motivations, along with the lessons we can draw from them, enables us to improve our commercial offers, innovation and communication as well as continue to develop our strategy.

The Observatory, conducted on our behalf by Opinion Way, was carried out on an unprecedented scale, with more than 11,800 people interviewed in 9 countries around the world, enabling us to pull out different nuances and meanings according to socio-professional categories and geographic locations.

We are seeing ever more intense and personalised uses, particularly in the fields of health, finance and education.

However, users are also becoming more aware of the potential risks: hyper-connection, insecurity around personal data and concerns around undermining social relationships.

Indeed, this might indicate that we’ve finally entered an era of digital

Enjoy reading.

Summary

Methodology	5
Learnings from the Observatory	6
#1 Understanding the risks of using digital technology	8
1.1 Digital tools, essential life companions	
1.2 Benefits and risks of digital: a paradox felt by users	
1.3 The perception that the benefits of digital outweigh the fears	
#2 Towards more responsible uses	12
2.1 A need for disconnection expressed... but difficult in practice	
2.2 Accepted harmful effects of digital	
2.3 Controlling screen time and monitoring children's use	
2.4 Responsible uses including recycling	
#3 Technology and society: digital tools that help us live together	16
3.1 How digital inclusion can overcome technology illiteracy	
3.2 Citizenship and social relationships: contrasting perceptions	
#4 Understanding the risks to personal data	20
4.1 Protecting personal data: a shared and growing concern	
4.2 How trust varies towards different digital players	
4.3 Artificial intelligence: contrasting visions	
#5 Tomorrow's tech: more personalised servicers	24
5.1 Digital learning: enthusiasm and reluctance	
5.2 Connected health: strong development potential	
5.3 "Mobile money" services are now part of daily life	
Digital uses around the world	28
In conclusion	30

Methodology for the 2019 study

Representative sample of people with mobile phones

- **79%** of the population¹ in **Senegal**
- **53%** of the population¹ in **Côte d'Ivoire**

Telephone survey

Representative sample of internet users

- **44%** of the population¹ in **Egypt**
- **90%** of the population¹ in **South Korea**

Self-administered online survey

Representative sample of digital users*

- **75%** of the population in **France**
- **90%** of the population in the **UK**
- **72%** of the population in **Spain**
- **85%** of the population in the **USA**
- **38%** of the population in **Morocco**

Self-administered online survey

- **Total: 11,871 people** interviewed in **9 countries**.
- **Objective:** research in detail the perceptions, motivations and behaviours of individuals in relation to digital tools.

¹ Internet penetration rates and mobile rates: sources external to the Observatory

* According to the profiles chosen for the 2018 Observatory (definition of "digital user" on page 28)

Learnings from the Observatory



#1

Understanding the risks
of using technology

p.8

#2

Towards more
responsible uses

p.12

#3

Technology and society:
digital tools that help us
live together

p.16

#4

Understanding the risks
to personal data

p.20

#5

Tomorrow's tech:
more personalised
services

p.24

#1



Understanding the risks of using digital technology

#1.1 Digital tools, essential life companions

▪ Never without my smartphone! In all the countries covered by the study, a majority of digital users state they are unable to live without a smartphone: around 53% in Western countries (52% in France) and even more in Africa (81% in Côte d'Ivoire) or in South Korea (62%). The smartphone is now more popular than the TV and its sidekick, the internet, is seen as just as "vital" for almost two-thirds of the population surveyed.

▪ Conversely, social networks are seen as less essential: 75% of digital users in France and Spain could do without them, rising to 82% of Americans. It should be noted that African countries are more attached to them, perhaps due to their more recent and useful appearance on the market.

A world where it's impossible to live without your internet or smartphone

Could you live without...?

% of respondents couldn't live without...

67%
without the internet

61%
without a mobile

44%
without a TV

33%
without social media

- Smartphones are seen as real everyday companions, and are consulted at least once an hour by more than half of respondents. This generates a feeling of dependency, which is not so much the case when it comes to other tools such as a PC or tablet. Added to this feeling of addiction is the notion that it's hard to do without a smartphone to get from A to B, communicate, find out information or even work.

- This intense use goes hand in hand with a growing number who gaining confidence when using technology. At least half of all respondents state they are "advanced" compared to the people around them when it comes to using digital tools. This feeling is rising sharply in France (+8 points) and in the UK (+6 points). Technology is becoming second nature, and an integral part of our daily lives.

#1.3 The perception that the benefits of digital outweigh the fears

- In terms of the efficiency of digital tools, saving time is recognised as a bigger advantage than the risk of distraction or time wasting. This is the case in all countries: a difference of 15 points between the two in Egypt, rising to 58 points in Côte d'Ivoire.
- Of all the uses tested in the Observatory, we find the same positive trend. The greater the concern, the greater the benefit will be.
- This acceptance or awareness of the potential risks, expressed by the people with varied uses, shows a certain balance in behaviour: is it therefore indicative of an aspiration to use technology rationally and responsibly?

#1.2 Benefits and risks of digital: a paradox felt by users

Benefits

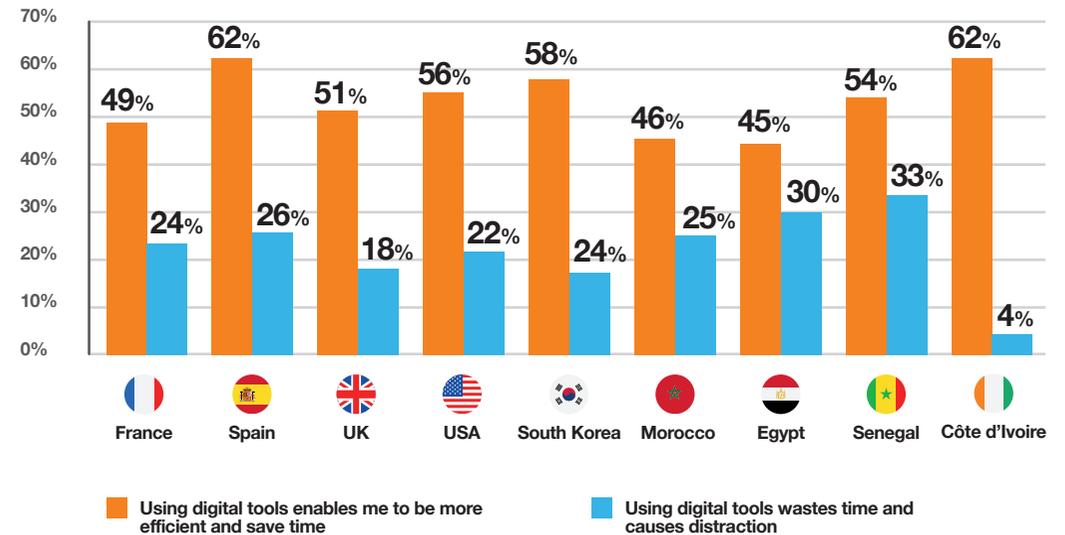
- Time and productivity gains: these functional benefits are obvious and recognised in all countries.
- Benefits are also emotional: communication with loved ones remains a very strong motivating factor for use.
- In the four African countries, being open to the world is ranked among the main advantages, much higher than elsewhere, as cited by 51% of the population in Côte d'Ivoire and 44% in Senegal.

Barriers

- When it comes to the barriers related to digital uses, the primary concern is protecting personal data, which is higher among older people in France. This echoes reservations about artificial intelligence and voice assistants and their impact on privacy.
- In the same way many users confirm (at more than 80%, even more numerous in France and Spain) that they are aware of their own digital footprint. This is a real concern but does not (yet) seem to be slowing down uses.

The balance of benefits to risks falls in favour of digital tools

Do you agree or disagree with the following statements?



The need to protect personal data does not prevent the widespread acknowledgement of the benefits of technology:



- Making everyday life easier
- Staying connected to loved ones
- Gaining time (specific to Europe)
Open to the world (specific to Africa)



- Data protection
- Lack of reliability
- Dependency risks (specific to Europe)
Health risks (specific to Africa)



Recap

- We can't live without the internet or smartphones.
- We can live without social media.
- The benefits of technology outweigh the fears.

67%
can't live without the internet.

61%
can't live without their smartphone.

#2



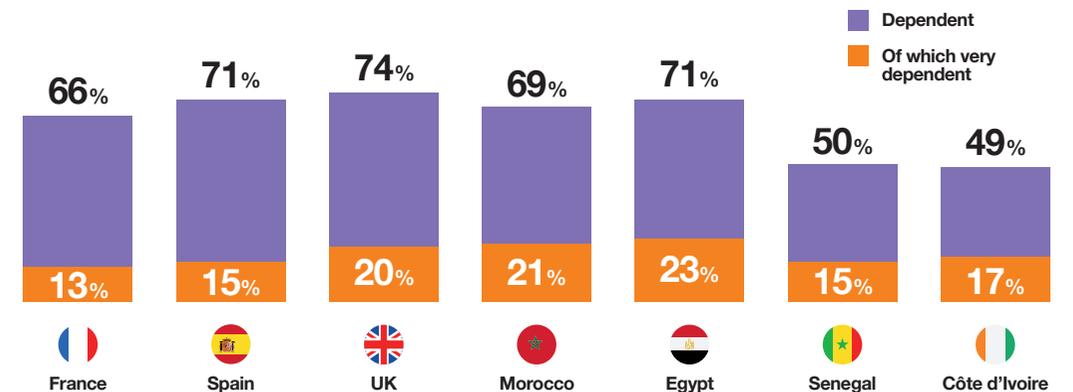
Towards more responsible uses

#2.1 A need for disconnection expressed... but difficult in practice

- In all countries, more than 8 out of 10 users state that they feel the need to disconnect. However, a significant proportion of them (between 20% and 30%) admit they find this very difficult to put into practice.

Are all digital users addicted?

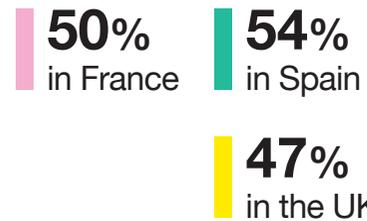
Today, would you say you are personally very, somewhat or not at all dependent on digital tools?



- Some people may feel awkward about wanting to disconnect. A proportion of users are not comfortable being out of touch or are afraid to miss something if they don't respond to messages quickly. This represents 9% of French digital users and 24% of Senegalese. This feeling illustrates the tension between the desire to moderate use and the feeling that staying connected has become a social norm.
- Not having a smartphone can even make people feel anxious (nomophobia). More than half of all users, especially younger users, admit they feel anxious if they don't have their phone on them: 55% in France, 62% in the UK, 70% in Spain and nearly 80% in African and Middle Eastern countries. Therefore, it's not surprising that a large number of users say they return home if they've forgotten their smartphone!
- Today, users are putting various strategies in place to moderate their smartphone use (such as putting their phone on silent, setting up phone-free times or zones and uninstalling certain apps etc). However, they are still waiting for more structured and less empirical approaches to enable them to choose and manage their digital uses to complement real-life experiences.

#2.2 Accepted harmful effects of digital

▪ The sometimes excessive use of technology can provoke ambivalent feelings. Nearly half of respondents say they sometimes feel they're a slave to digital tools:



This feeling of addiction can relate to time wasting and unproductiveness, which is also cited by half of all users in Europe and even more in Morocco and Egypt (70% and 78% respectively).

These harmful effects can have a direct consequence on our health. Symptoms such as nervous fatigue and irritability are recognised by approximately 40% of users in Europe and more than 70% in North Africa.

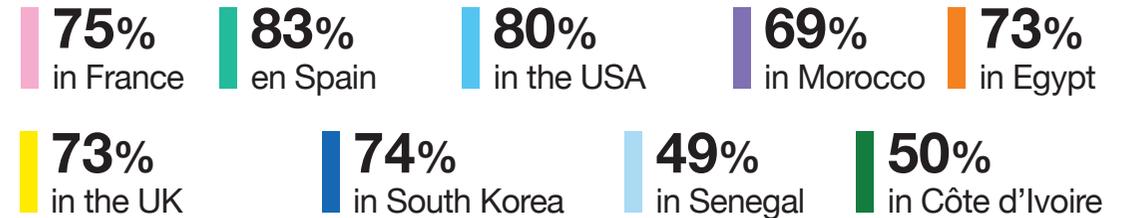
#2.3 Controlling screen time and monitoring children's use

▪ More and more people are starting to adopt applications for controlling screen time on a smartphone: according to the countries surveyed, between 15% and 20% of respondents say they use them and even more say they intend to in the future (20% to 50%). France, meanwhile, is more reluctant, with 67% of respondents saying they don't wish to use them.

▪ When it comes to children's device use, or the content they see on it, one in four parents don't control it (in France and the UK). Those who do, say they control both the content and screen time. In Morocco and Egypt it is primarily content before time that is a concern.

Parents controlling their children's screen time Do you control your children's technology use?

% of yes



#2.4 Responsible uses including recycling

▪ When talking about the issue of digital pollution, there's a major concern about device obsolescence and how frequently they're replaced. Users are less attached to physical devices than the services they can access through them. In France, 29% are "very" ready to upgrade less often, compared to 14% who agree to reduce their use.

▪ Recycling is also starting to become well accepted in Western countries: one in three users claims to already do so. However, this does mean that two out of three people have yet to get into the habit of recycling. This reflects a real opportunity to educate people about the subject.



Recap

- An awareness of the harmful effects.
- A need to disconnect but it's difficult to put in practice.
- A desire to manage technology uses.

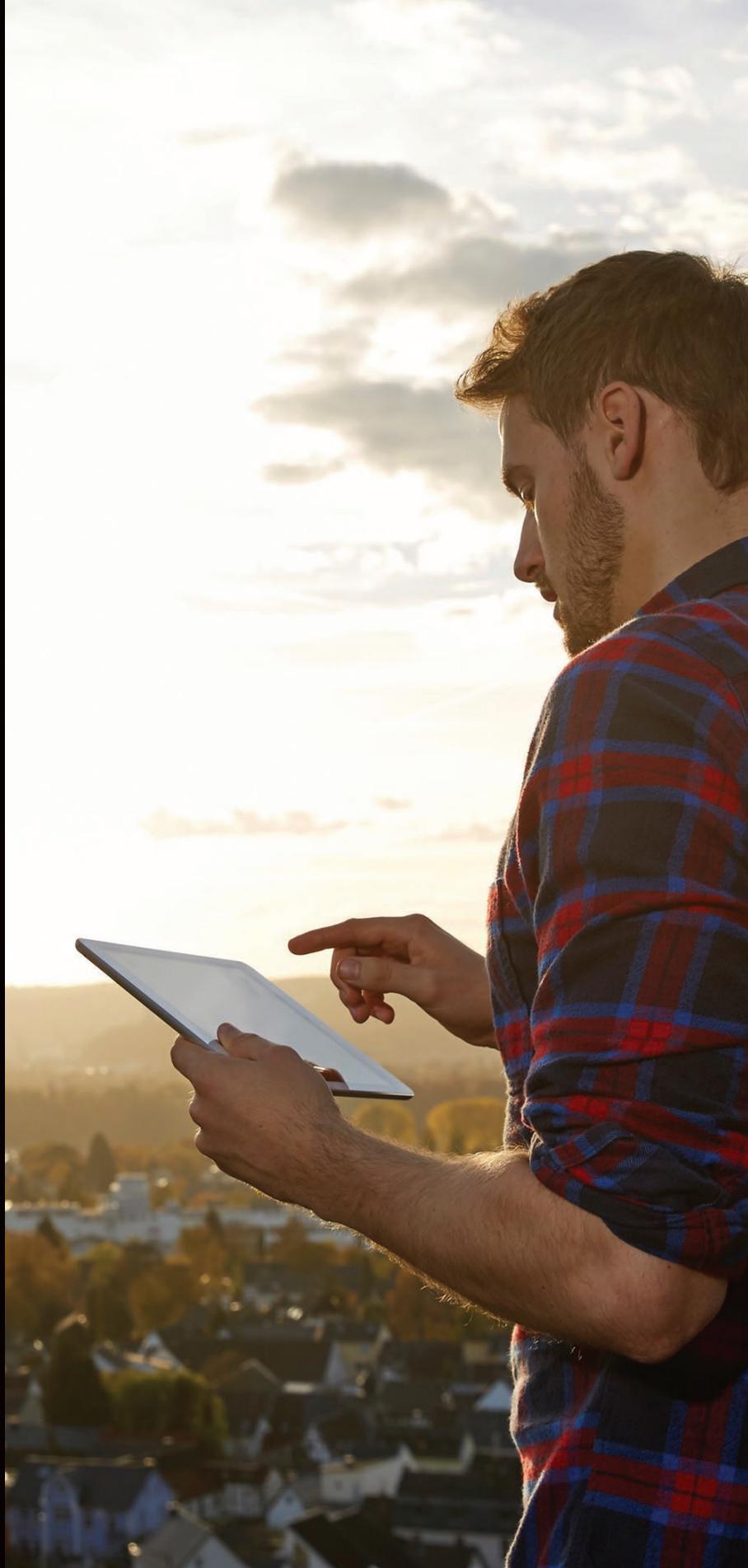


Eight out of ten people feel the need to disconnect.

20%

Only 20% use apps that help them control screen time.

#3



Technology and society: digital tools that help us live together

#3.1 How digital inclusion can overcome technology illiteracy

■ Digital inclusion, or giving everyone access to technology, is a subject that the majority of interviewees felt was important. It should even be a national priority for:

72%
in France

87%
in Spain

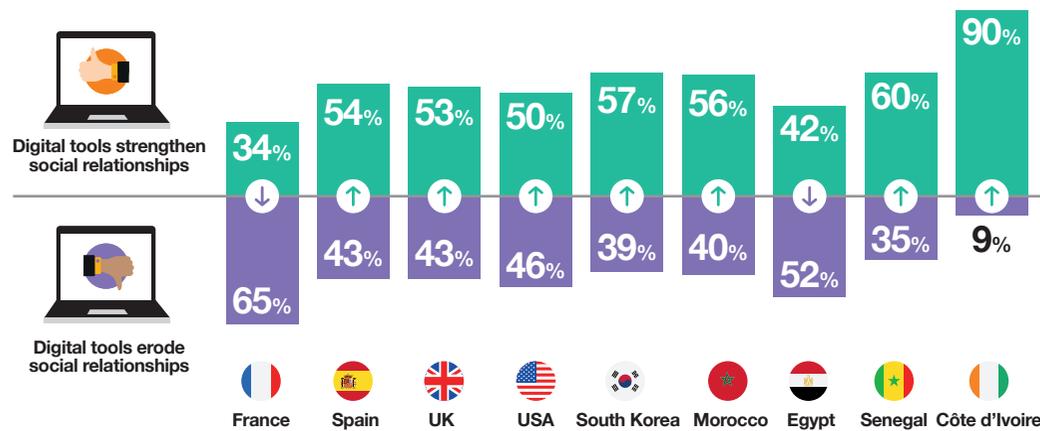
■ Even if digital is “theoretically” accessible to everyone, in practice some users are limited by the cost (16% in France, higher when it comes to young or unemployed people or rural communities, and 57% in Côte d’Ivoire). Difficulty using these tools is another reason cited by 11% of French respondents and up to 19% of over 65s. In the UK, this proportion is 15%, rising to 35% in Côte d’Ivoire. The fringes of society are therefore, if not totally excluded, still playing catch up in their adoption of digital tools.

#3.2 Citizenship and social relationships: contrasting perceptions

The countries surveyed have very diverse opinions when it comes to the impact of digital on social relationships. The Egyptians and French are the most pessimistic. For 65% of French people, technology weakens social bonds rather than strengthens them.

Young people, however, are more positive: for 42% of 15-24 year olds, digital strengthens these bonds. Côte d'Ivoire stands out on the subject: 90% of respondents see it as strengthening social relationships.

Digital: does it accelerate or destroy social relationships? Which of the following two statements do you agree with the most?



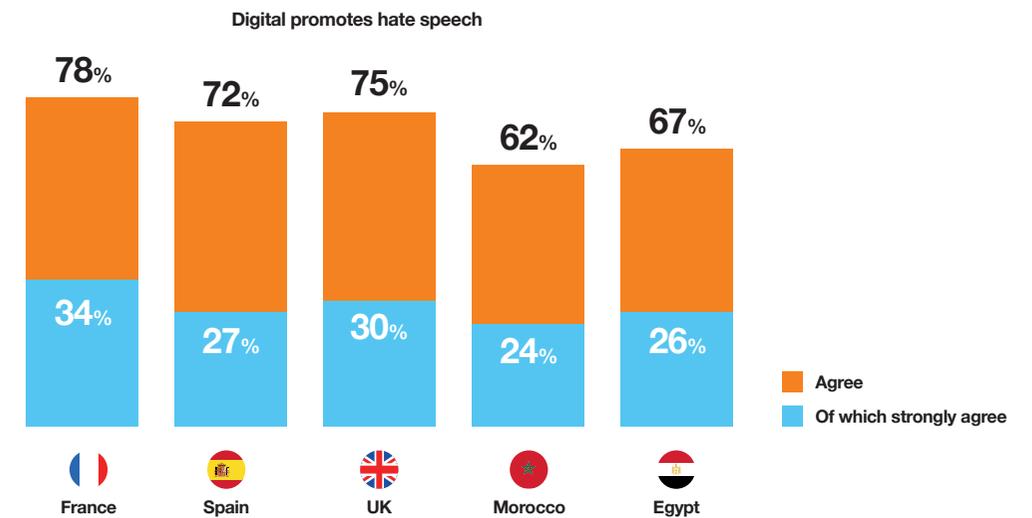
Although it can reinforce social relationships, technology is guilty of creating or accentuating isolation. This feeling is shared by almost three quarters of users, with the exception of Côte

d'Ivoire, which again stands out in terms of its optimism (only 24% recognise the risk of social isolation).

Hate speech, distribution of fake news, abuse... the internet and especially social networks can encourage behaviour that's even more violent than in real life. These risks, recognised by the majority of respondents, appear a little more strongly in France: 36% "strongly agree" (and even more among seniors) that digital can lead to abusive interaction and 34% to hate speech.

But there are also some positive aspects. Digital can, for example, encourage deeper debate and broader discussion in Morocco and Egypt, which is less the case in France and the UK.

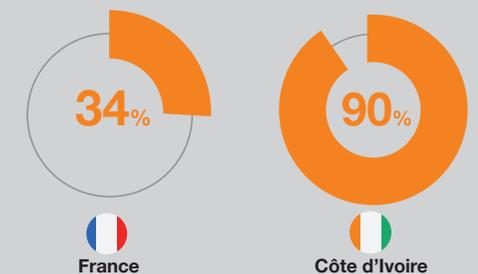
Digital is seen to drive and amplify hate speech Do you agree or disagree with the following statement?



Recap

- Fighting e-exclusion is a national priority for 72% of French people.
- Cost and difficulty of use are the two major reasons for e-exclusion.
- Digital is a platform for hate speech but also for deeper discussion.
- Opinions are polarised between whether digital creates social relationships or isolation.

Digital strengthens social bonds for:



#4



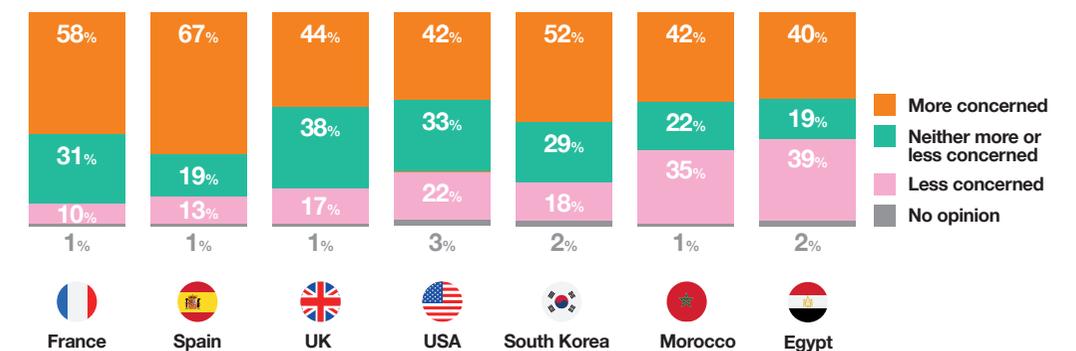
Understanding the risks to personal data

#4.1 Protecting personal data: a shared and growing concern

- Since GDPR* entered into force in Europe in 2018, coupled with various scandals affecting web giants, digital users are becoming more and more concerned about how their personal data is protected. The issue, shared in all countries, is one of the main barriers to adopting digital tools.
- Concerns about personal data hacks have intensified in recent years: the majority of French and Spanish people are more worried than five years ago (58% and 67% respectively).

Increasing anxiety about personal data hacks

Would you say you're more or less concerned about personal data hacks than five years ago?



* General Data Protection Regulation

- In the Latin countries surveyed, a large majority of users are aware that they leave a digital footprint: 85% in France and 87% in Spain. In the English-speaking countries, this figure is a little lower but still reaches 61% in the UK and 67% in the USA. This is a cause for concern for nearly 72% of users in France and Spain, but also Morocco and Egypt. The English-speaking countries are a little less worried (61% in the UK and 59% in the USA).

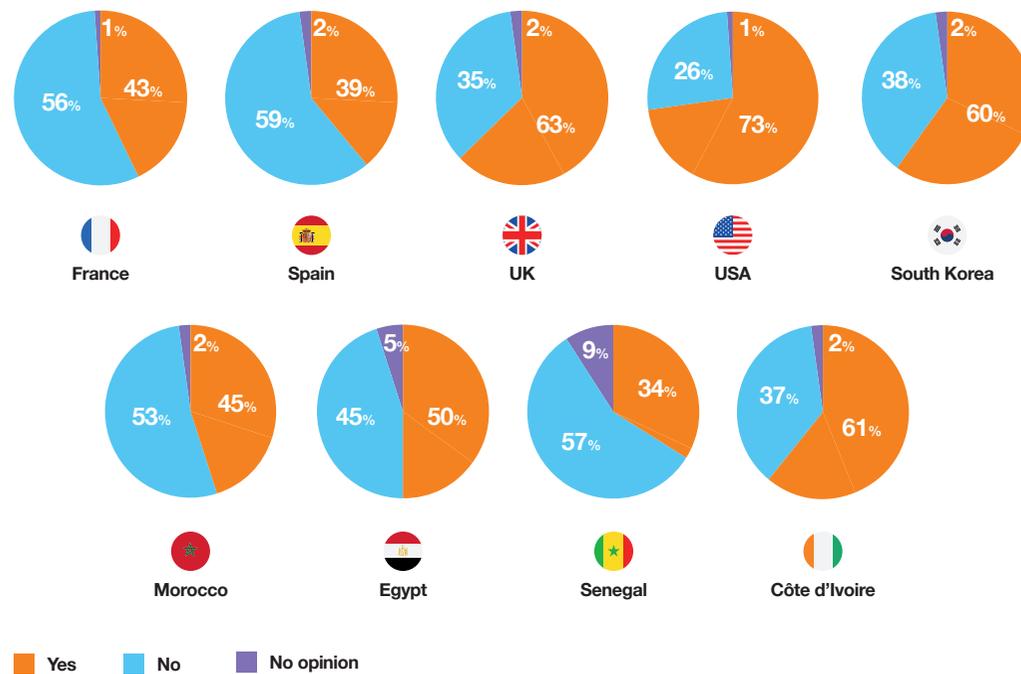
- Parents are also worried about the risks for their children: their level of worry about their children’s digital footprint is similar to what they feel about their own.
- Online behaviour is paradoxical. Despite their concerns, some parents share photos of their children online. Again, there is a cultural difference between Latin and English-speaking countries: English and American parents are much more likely to share photos of their children online, while the French and Spanish are more reserved.

#4.2 How trust varies towards different digital players

- Social networks have a low level of trust: 31% in France and 41% in Spain. Even in the English-speaking countries surveyed, trust only remains moderate: 51% in the UK and 50% in the USA. On the African continent, trust is higher in North Africa than in sub-Saharan Africa.
- Websites managed by mobile operators also enjoy higher levels of trust: two thirds of respondents in all countries. This is even higher in Senegal and Côte d’Ivoire, where “very confident” rises from 40 to 51%. In both of these countries, there is also a high level of trust in “mobile money” services.
- Online public services, such as government-run websites, are more trusted by users.

A significant proportion of parents publish photos of their children online

Do you share or post photos of your children on the internet?



#4.3 Artificial intelligence: contrasting visions

- Artificial intelligence is said to be well known in Europe and a little less so in Morocco and Egypt: its awareness rating is 91% among French internet users, of which 53% say they have a good level of knowledge. This reaches 92% in the UK (46% “good”) and 89% in Spain (48% “good”), against 79% in Morocco and 83% in Egypt.
- Today, the perception of artificial intelligence carries more risks than opportunities. The medical field is an exception, where perceived opportunities are much higher. For the other sectors tested, people are more worried: especially when it comes to employment but also in terms of democracy, security and the economy... note that North African countries (Morocco and Egypt) express much less reticence.



Recap

- Personal data is the biggest digital risk.
- Parents may be anxious but they still share photos of their children online.
- Artificial intelligence poses more risks than opportunities.



One in two people are concerned about personal data hacks.



More than one in two people do not trust social networks.

#5



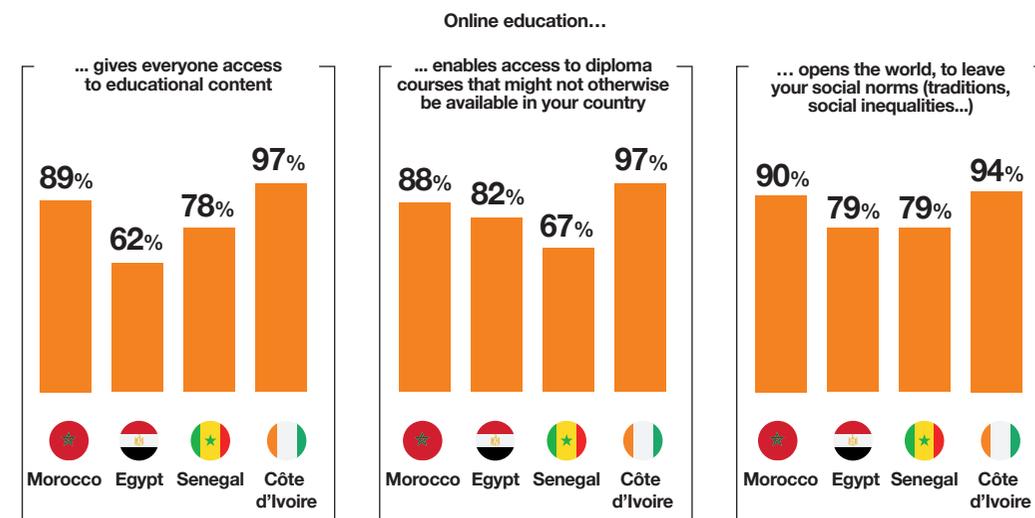
Tomorrow's tech: more personalised services

#5.1 Digital learning: enthusiasm for adults and reluctance for children

Online training has a very good reputation, especially in African countries, where it is seen as a way to give as many people as possible access to high quality training. Here we can see the perceived benefit of being

open to the world associated with online training (94% in Côte d'Ivoire, 90% in Morocco, 79% in Egypt and Senegal). Notably, the Spanish are also in favour of it.

For countries in Africa, online education is seen as synonymous with enabling greater access to knowledge and being more open to the world
Do you agree with the following statements?



- In comparison, the UK, USA and France express greater reservations when it comes to online courses and MOOCs, with less of a gap between the benefits and perceived risks.
- Use of technology resources in schools is already widespread across Europe and the USA. France is an exception, and is playing catch up (only 22% of parents say their children have access to digital media).

In a context where screen exposure is at the heart of many debates and worries, the usage of technology in school could raise a level of additional concerns and considerations, no matter what is the current level of digital equipment in the different countries. This is particularly noticeable in the UK and France.

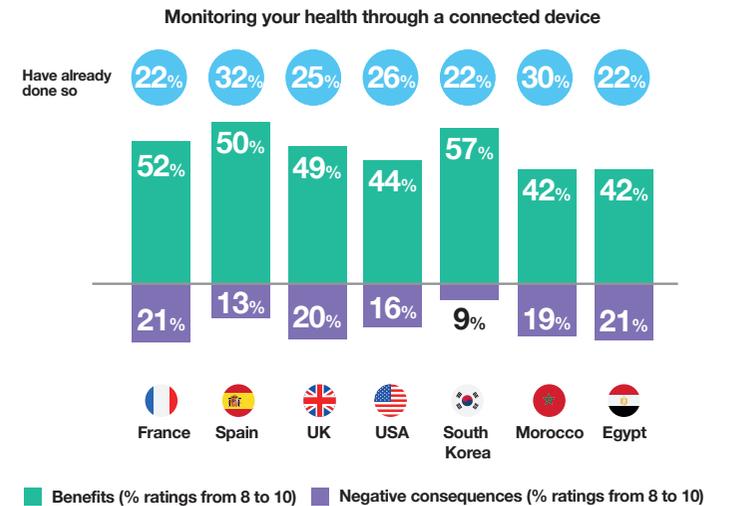
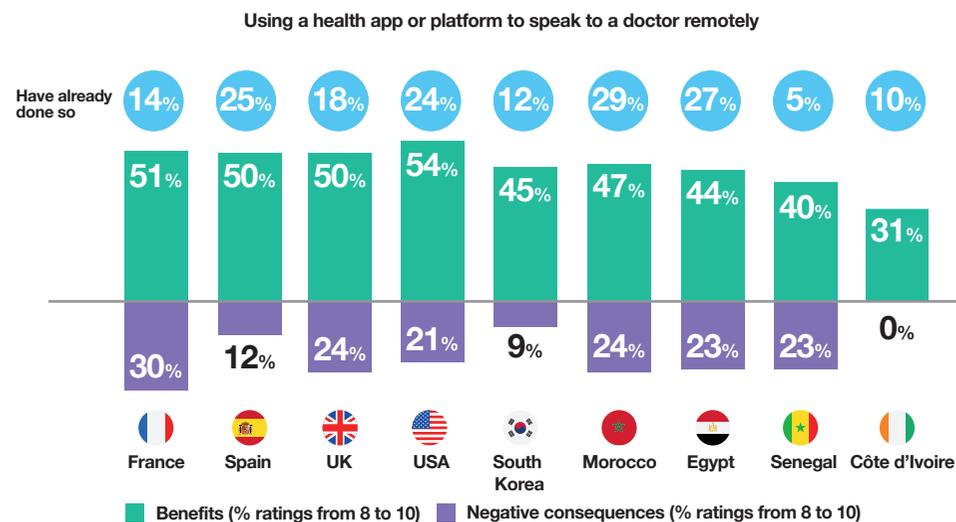
#5.2 Connected health: strong development potential

- Medical teleconsultations are an emerging practice that continues to develop: 14% of digital users have already experienced one in France, 8 points more than in 2018. This use is also increasing in other countries, reaching up to

29% of respondents in Morocco. The perceived benefits are high, especially in the USA and Europe. If, for some, there are some risks, the balance remains largely positive.

Enthusiasm for health apps in Europe, Morocco and the USA

How would you rate the effect of this use on your daily life, in terms of positive or negative consequences?



- Uses of connected devices to monitor different aspects of our daily health are also growing: between 22% and 32% of digital users in the various countries surveyed. This rate is increasing everywhere except in the USA. Again, there are very strong benefits seen in all countries surveyed which far outweigh the potential risks.

#5.3 "Mobile money" services are now part of daily life

- In Côte d'Ivoire and Senegal there has been a mass adoption of mobile money services, whether to pay for items or transfer funds. The differences between the benefits and perceived risks exceeds 50 points in both countries: the positive aspects clearly dominate.
- These services, launched several years ago and now widespread among mobile users, have also gained a lot of trust: 83% in Senegal (53% of whom are "very confident"), 82% in Côte d'Ivoire (52% "very confident").

Wide adoption of "mobile money"

Which statement best matches your current situation?

Transfer or receive money via your mobile phone through "mobile money"

86% in Senegal | **94%** in Côte d'Ivoire

Using a "mobile money" service to pay for items:

72% in Senegal | **73%** in Côte d'Ivoire



Recap

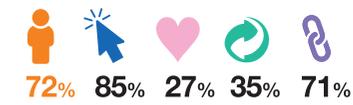
Opportunities for development in:

- Education: giving as many people as possible access to high quality training.
- Health: growing uses.
- "Mobile money": a service that has gained a lot of trust.

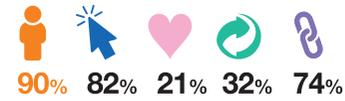
Medical teleconsultations:

18% already use it. | **46%** see the benefits.

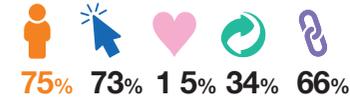
Digital uses*



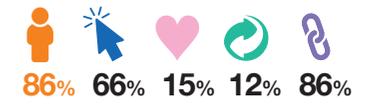
Spain



UK



France

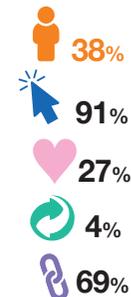


South Korea

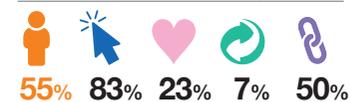
USA



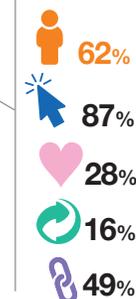
Morocco



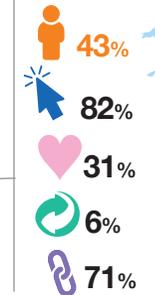
Senegal



Côte d'Ivoire



Egypt



*Definition "Digital user"

A digital user is, in this study, defined as an individual who regularly carries out two of the following online activities: instant messaging, shopping, banking, consulting online media, social networking, streaming or downloading content, administration, exchanging goods or services between individuals. Individuals who only use email or search engines are not defined as a digital user for this study.

USA, South Korea and Morocco: figures recalculated for the whole population using internet penetration data (from external sources) and data from digital practices from this survey.

Profile of digital users



Interested in digital



Passionate about digital



Recycle their devices



Dependent on digital

In conclusion

the keys outcomes from the study

———— Digital has become part of daily life in all geographies. This goes hand in hand with higher levels of interest and a more widespread feeling of understanding about the subject and its tools.

———— This level of maturity is translating into an increased awareness of the risks, in particular dependency and isolation, unreliability and personal data security. However, digital brings so many benefits to users that are seen to outweigh the risks.

———— Intense digital use is resulting in a growing need for disconnection, even sporadic: paradoxically, individuals find it hard to put this into practice. In fact, users are adopting a wide range of pragmatic strategies to achieve it, but there is a perceivable expectation for greater support and more responsible and protected online experience.

———— Tomorrow, digital technology will continue to grow, firstly by offering ever more personalised services (especially in health, education and financial services) and secondly by increasing access and understanding for everyone.

