

The 2018 Digital Barometer Survey

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Abstract:

The “digital barometer”, a yearly survey on digital equipment and its uses in France, has gradually become the reference source for public authorities, firms and other parties interested in digital technology. In 2018, nearly everyone in France was a cybernaut who used the Internet daily. The penetration rate of devices and their uses have peaked (the social media, on-line commerce) or are even diminishing (computers, tablets). The current momentum comes from new devices and forms of access (smartphones and mobile Internet connections) and new uses (on-line audiovisual and health services, for instance). Although the lack of protection of personal data is the major deterrent to using the Internet, the French are, paradoxically, not ready to put much effort into protecting their personnel data.

“The digital barometer is a yearly appointment that sheds light on electronic devices and citizens’ uses of them. It takes the pulse of our society as it faces technological trends. It tells us about behaviors and the new practices that have become the everyday life of the French people. It provides orientation in relation to expectations and apprehensions. It informs the actions we have to undertake.”

— Mounir Mahjoubi, undersecretary in charge of digital technology.

The Digital Barometer, a reference source on the diffusion of digital technology in France

Since 2000, the Conseil Général de l’Économie (CGE) has ordered a yearly survey on the diffusion of information and communications technology in French society. Its partners for this survey have been: since 2003, the Regulatory Authority of Electronic Communications and the Post Office (ARCEP: Autorité de Régulation des Communications Électroniques et des Postes) and, since 2016, the Digital Agency (Agence Numérique). This survey follows up on electronic devices and their uses while watching out for new tendencies.¹

This survey’s reliability comes from the use of face-to-face interviews with a large sample of persons over the age of twelve, who have been selected using the quota sampling method (2214 persons in 2018).² The results are adjusted to be representative of the French population. Owing to the collection method and the sample’s size, the data can be analyzed in detail as a function of sex, age, occupation, income, educational level, the number of persons in the household, and the size of the agglomeration of residence.

¹ This article has been translated from French by Noal Mellott (Omaha Beach, France). All websites have been consulted in April 2019.

² CROUTTE P., DAUDEY E., HOIBIAN S., LEGLEYE S. & CHARRANCE G. (2015), “Une approche de l’effet du passage sur Internet d’une enquête en population générale”, *Cahier de recherche*, C323, December, 60p. available via <https://www.credoc.fr/download/pdf/Rech/C323.pdf>.

Since this survey has been repeatedly conducted for more than a decade, it has become a reference source, a genuine barometer of digital technology. The data from surveys since 2007 are available as open data; and the reports too.³

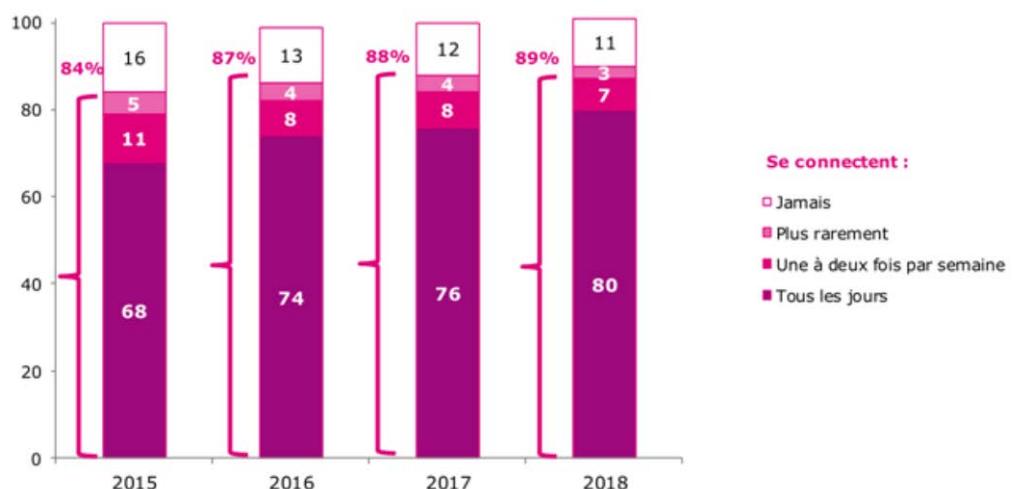
The findings of the 2018 survey are presented herein. Unless indicated otherwise, all graphs come from this report; and the statistics presented concern persons more than 12 years old. Herein, the word “cybernaut” refers to anyone who connects to the Internet, regardless of the place, mode or frequency of connections.

An overwhelming majority of cybernauts

In 2018, 89% of the French population over the age of twelve were cybernauts. This percentage attained 100% among 18-24 year-olds and 97% among 12-59 year-olds. The proportion of cybernauts in the population is now rising more slowly: +1 point in 2018, the same as in 2017.

Persons over 70 were the least connected, but this age-group was also making the most progress. The percentage of cybernauts in this age-group rose by 7 points in 2018, 5 points in 2017 and 10 points in 2016, and from 38% to 60% between 2015 and 2018.

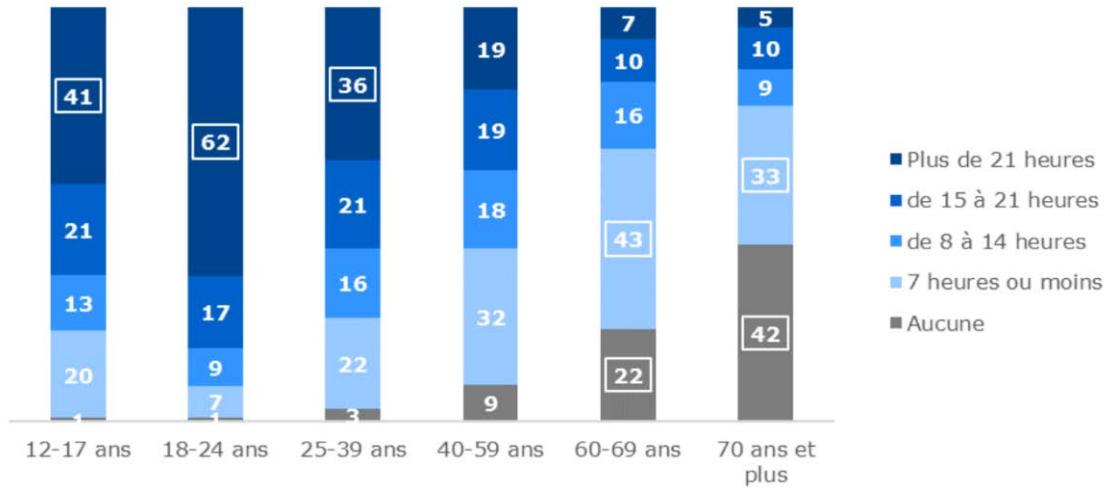
Figure1: “How often do you connect to the Internet (regardless of the place or sort of connection)? Never; seldom; once or twice a week; every day” (% of persons 12 years old and older in 2018).



In 2018, 89% of cybernauts — 80% of the population over 12 years old — connected to the Internet daily whereas only 81% did so in 2015. This growth in daily use has not come along with a significant increase in the time spent on the Internet: on the average, 18.1 hours per week in 2018 (approximately as much as the time spent in front of a television) as compared with 17.5 hours in 2016. The time spent on the Internet varied much more as a function of age: 79% of 18-24 year-olds connected for more than two hours per day but only 15% of persons over 70. In all, 42% of the population used the Internet more than two hours daily.

³ The data on <https://www.data.gouv.fr/en/>; and the reports on the CGE’s website. The most recent report is *Baromètre du numérique – édition 2018*, 256p. available via https://www.economie.gouv.fr/files/files/directions_services/cge/Rapports/Rap2018/Barometre_numerique_2018.pdf.

Figure 2: Time spent on the Internet by age-group (% of persons 12 years old and older in 2018).

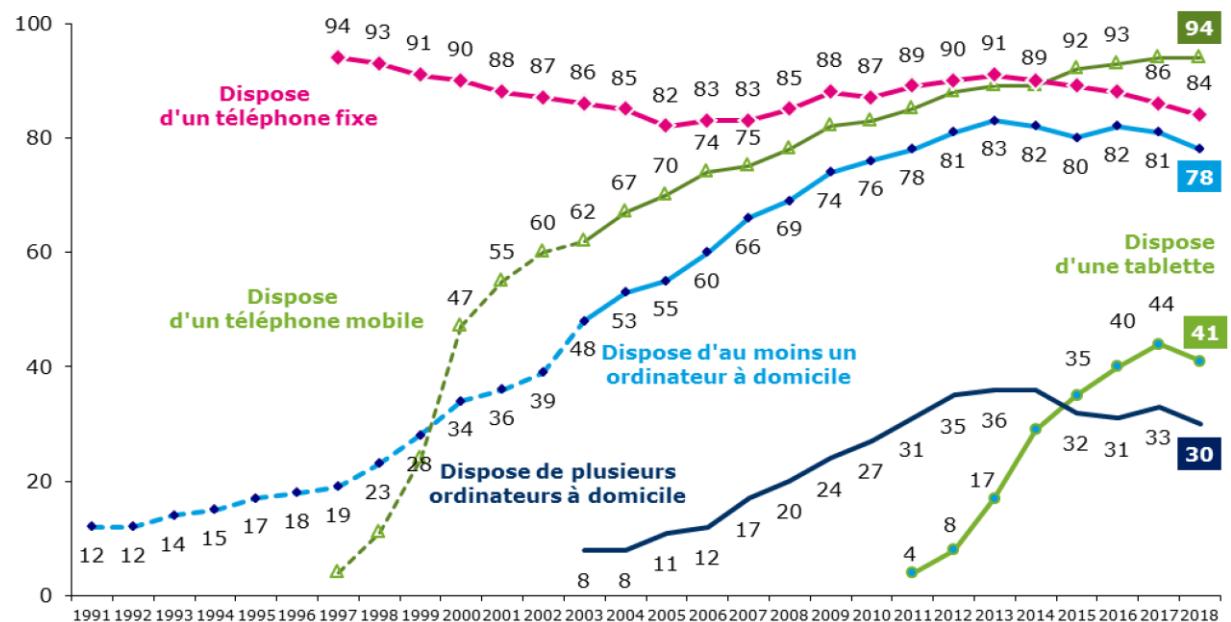


In 2018, the French used a variety of terminals for hooking up to the Internet: 93% had at least one computer, smartphone or tablet; 33% had all three of these devices; and 42% had two out of the three.

Household equipment rates have fallen for some devices

Except for smart- and mobile phones, household equipment rates have declined: one computer per household, from 81% to 78%; more than one computer per household, from 33% to 30%; and tablets, down to 41% (after having exploded from 4% to 44% between 2011 and 2017).

Figure 3: Internet terminals per household: landline telephone; mobile telephone; at least one computer; more than one computer; a tablet (% of persons 12 years old and older in 2018).

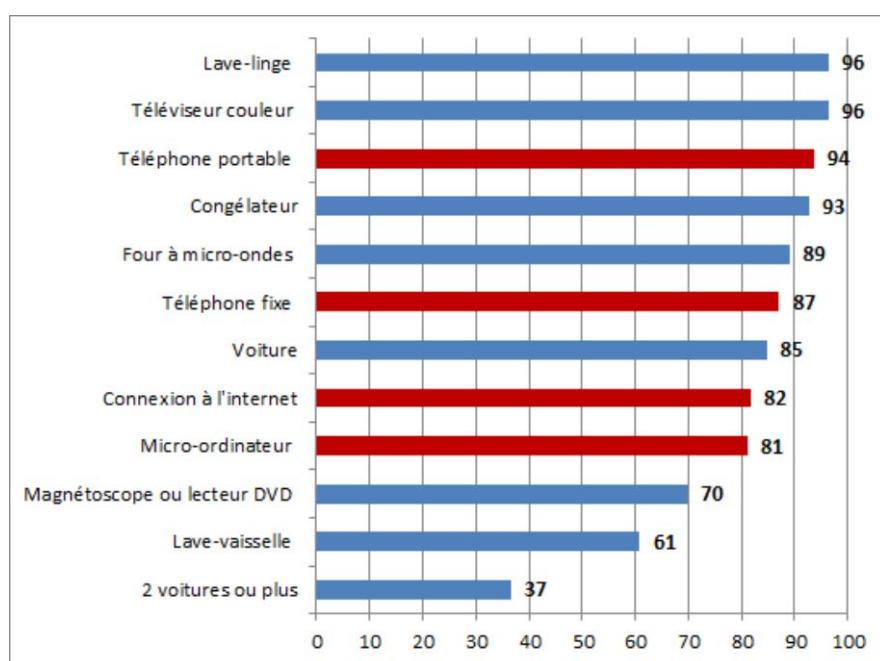


Since the Internet bubble burst in 2000, “new technologies” have become goods and services of mass consumption. In 1997, landline telephones peaked at 94%, and mobile telephones were an insignificant 4%. Mobile phones then advanced fast, moving past landlines in 2014. The equipment rate is now 94% as compared with 84% for landline telephones.

Many digital devices have spread to the point of being a full part of the population’s way of life. As regards household equipment rates, the mobile telephone now lies between the washing machine and freezer; and connection to the Internet, between the car and the dish washer.

Figure 4: Household equipment rates: washing machine; color TV; mobile telephone; deep-freezer; microwave oven; landline telephone; car; connection to the Internet; laptop computer; videocassette recorder or DVD player; dishwasher; two or more cars.

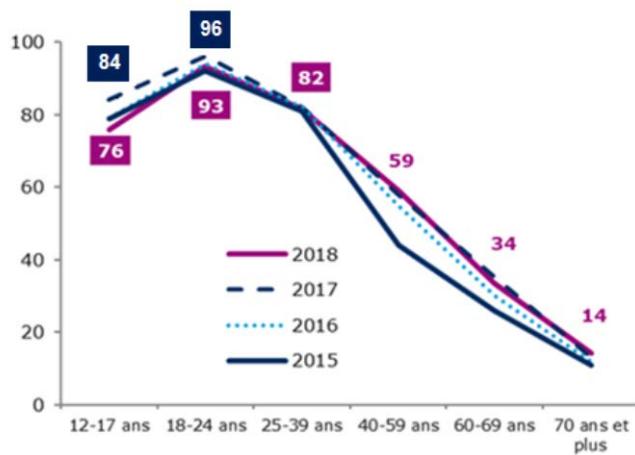
Source: INSEE/SRCV Silc (2016) Équipement des ménages en biens durables.



Established uses have hit a ceiling

The uses of electronic devices have stalled. While the rate of participation on the social media remained stable at 59%, these media have been losing their youngest participants. Participation dropped 8 points among 12-17 year-olds (from 84% to 76%) and 3 points among 18-24 year-olds (from 96% to 93%). Since young people are the future and influence the market, the Net giants are massively investing to retain them by providing services that are not necessarily seen as related to the social media.

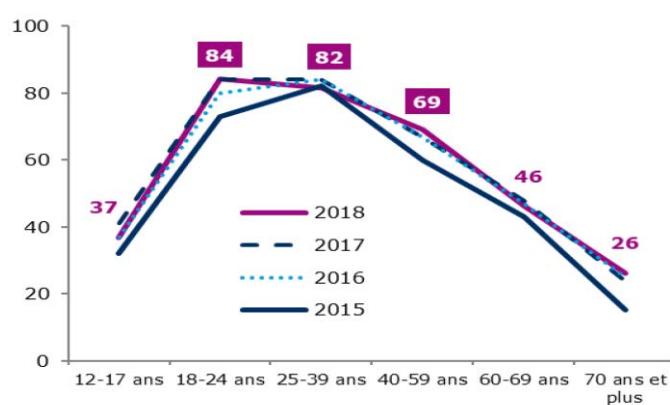
Figure 5: Percentage of respondents by age-group who used the social media during the past twelve months (% of persons 12 years old and older in 2018).



The percentage of online shoppers was stable in 2018: 61%, the same as in 2017. However more than 80% of 18-39 year-olds made online purchases. Furthermore, the number of transactions rose. The proportion of persons making an online purchase once a week rose from 29% to 35% between 2016 and 2018.

The drawbacks to e-commerce have also changed: concerns about the safety of online payment fell from 38% to 29% in one year, while, during the same period, criticisms about not being able to see or touch products rose from 24% to 28%.

Figure 6: Percentage of persons by age-group who made an online purchase during the past twelve months (% of 12 year-olds and older in 2018).



Internet connections via smartphones

The change since the start of the century is tremendous. In 2001 (the now forgotten era of WAP: Wireless Application Protocol), 13% of the French thought that they would be using a mobile telephone to browse on the Internet within the coming two years; and less than 5%, that a mobile telephone was the best way to connect. In 2009, mobile access to the Internet took off, rising from 7% to 13% of the persons who had a mobile telephone, even though, at the time, 45% of the persons with mobile phones did not feel any need to connect to the Internet.

The situation has changed significantly since then. In 2017, the smartphone was thought to be useful or very useful by 78% of respondents; and mobile access to the Internet, to be useful or very useful by 76%. In 2018, 64% of the population used mobile telephones to browse on the Internet; and 61% of the persons who did so connected using 4G. In fact, 42% of the French felt that their mobile connection to the Internet was faster than their landline. Even at home, 55% of respondents connected to the Internet via a mobile network: +4 points compared with 2017.

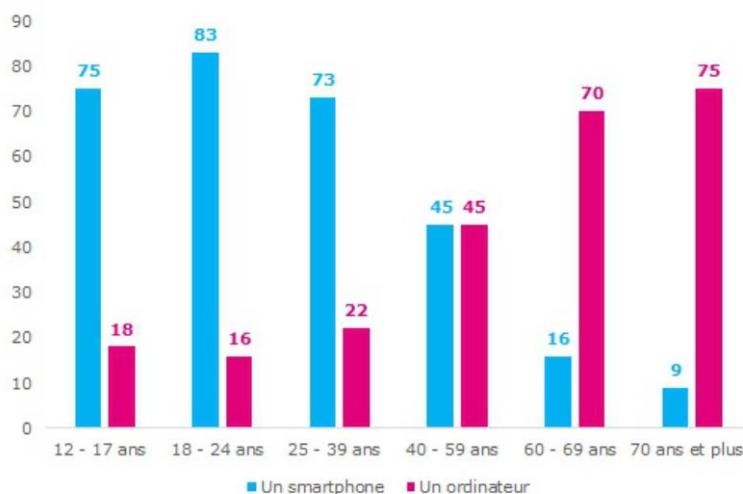
Unlike other, now classical devices, the smartphone equipment rate is still advancing: 75% in 2018 (+2 points). Smartphones are gradually taking the place of “simple” mobile phones. The cohorts the least equipped with smartphones are the age-groups where the equipment rate has been rising fastest: the equipment rate of persons over 70 by 4 points.

Figure 7: Equipment rates: no mobile telephone; classical mobile telephones; smartphones (% of persons 12 years old and older in 2018).



In 2018, smartphones became the most frequent means of access to the Internet: 46% of the population (+4 points) ahead of computers (35%, -3 points) and tablets (steady at 7%). Opinions varied widely by age: the oldest still preferred computers, but the 40-59 age-group, who, in 2017 were still using computers more often than smartphones (52% vs. 37%), were, in 2018, evenly split (45%) as to the best means for connection. In 2017, opinions varied depending on the use: computers were more used at work or for online shopping.

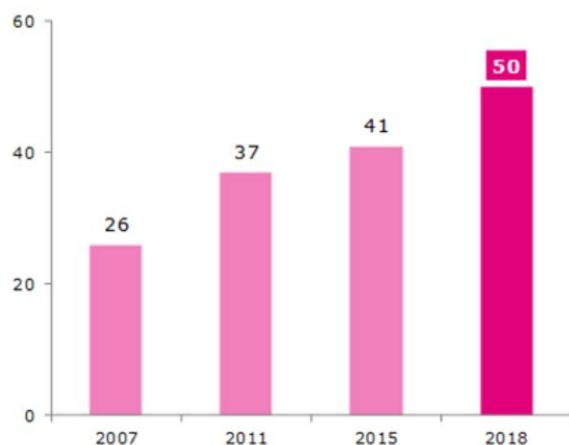
Figure 8: “How do you usually connect to the Internet? By smartphone; by computer” (% of all persons by age-group who connect to the Internet).



New uses driven by the smartphone

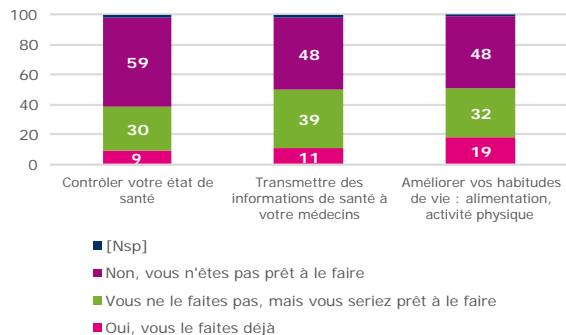
In 2018, 25% of the French population had a video-on-demand subscription (+5 points since 2016), 27% were watching television and 33% other audiovisual contents on a mobile terminal, a tablet or a computer. The average time spent per week watching videos on the Internet reached five hours (ten hours if the base is limited to persons who watch videos).

Figure 9: Percentage of respondents using the Internet for information on health (their own or that of someone close) (% of persons 12 years old and older in 2018).



More searches were also being made for information on health: 66% of 25-39 year-olds did so, 63% of the most educated. Women (53%) did this somewhat more than men (45%). People used the Internet and digital technology to control their state of health (9%), send information to their doctor (11%) and improve their habits with regard to food and physical activity (19%). Overall, 26% of the French have performed one of these three actions, and the potential for further development is high: 37% of the population were ready to adopt one of the three, and 18-24 year-olds were the most inclined to do so (46%). At the same time however, 36% of the population was not ready to do so, a percentage that fell to 20% among 18-24 year-olds.

Figure 10: “Are you personally ready to use the Internet and digital technology for...: Controlling your state of health; transmitting health information to your doctor; improving your habits (food, physical activity). No response; No, not ready to do that; No, I do not do that but might be ready to do so; Yes I have already done that” (% of persons 12 years old and older in 2018).



A paradox: The protection of personal data

For several years now, the insufficient protection of personal data has been said to be the major drawback to using the Internet. In 2018 — the year when the EU’s General Data Protection Regulation (GDPR) went into effect and when the Cambridge Analytica affair broke out — this concern increased by 6 points to reach 40% of the population and 43% of cybernauts.

The GDPR reassured only 23% of the population, while 64% thought that it would not change things very much. Concluding that the population is lucid or pessimistic about the usefulness of this regulation is a matter of opinion. On the contrary, the issue of confidence in the Internet is related to the protection of personal data and definitely consequential for digital technology’s future.

For all that, the population does not seem ready to make an effort to protect personal data. Only 40% were willing to pay for a service that would provide this protection or to accept more limited services. On the contrary, 30% were willing to share personal data (geolocation, likes and preferences) in order to obtain services for free.

The Internet’s was felt to be too complicated mainly by those who did not use it, but the perception of this drawback to using the Internet has decreased sharply: -10 points since 2008).

Figure 11: “What is the main drawback to using the Internet? Insufficiently protected personal data; too complicated to use; unsatisfactory after-sales services and assistance; too expensive; the Internet is not useful; none of these drawbacks; do not know.” (% of persons 12 years old and older, whether or not cybernauts, in 2018).

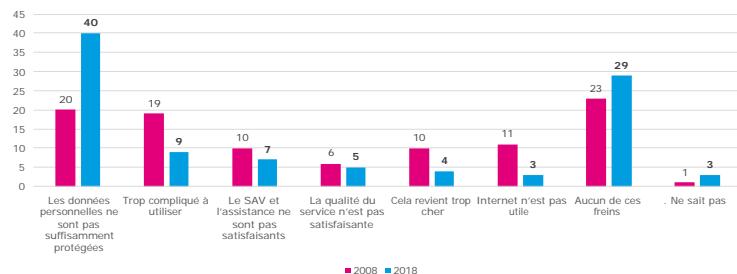


Figure 12: “Many services on the Internet (such as the social media, search engines, the press, etc.) are for free. Operators bring in income by exploiting users’ data. In exchange for the guarantee that your personal data will not be used, would you be ready to...: Pay for these services; have access to more limited services. No response; no; yes” (% of persons 12 years old and older in 2018).

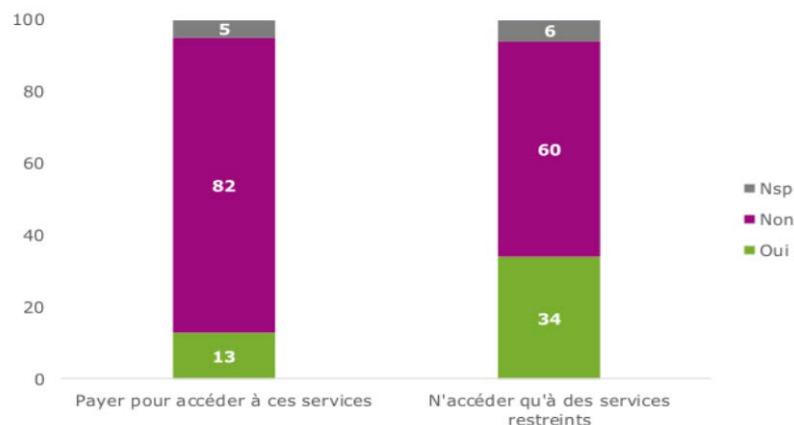
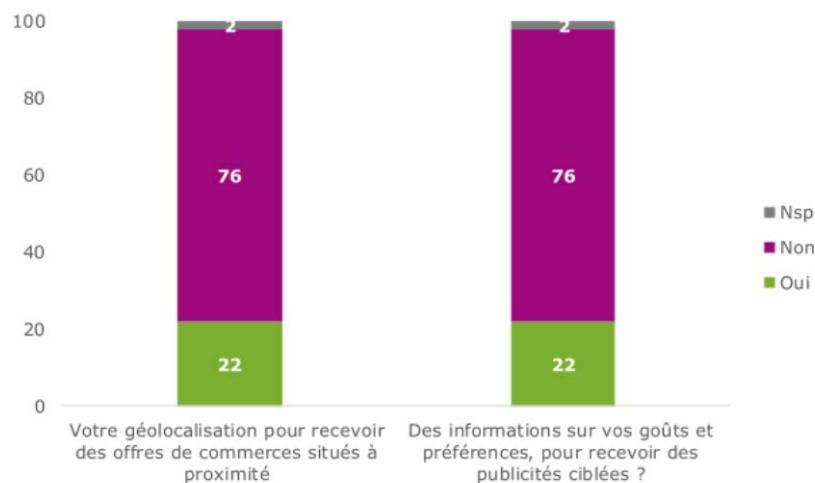


Figure 13: “To avoid paying for an Internet service that used to be for free, would you be ready to share...: Your geolocation in order to receive commercial offers from nearby businesses; information about your tastes and preferences in order to receive targeted advertising. No response; no; yes” (% of persons 12 years old and older in 2018).



French society in the digital era

The digital revolution is over. Nearly the whole French population has become cybernauts. They have, on the average, two terminals (a smartphone, tablet or computer) for accessing the Internet, which they use daily to make purchases or contact friends. Meanwhile, the digital realm's boundary is constantly expanding into new fields, such as health. Digital technology is destined to eventually cover all aspects of life and society.

Digital technology is now part of the way of life. However rules in the digital realm are not on par with ethical requirements or with expectations about the protection of personal data. An effort is, therefore, necessary to break with the law of the jungle on the Internet. The future will tell whether the GDPR and proposals about an e-privacy regulation will manage to make this break.