

# The Digital Barometer Survey

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## **Abstract:**

The Digital Barometer, a yearly survey on digital equipment and uses in France, has become the reference source for public authorities, firms and others who are interested in digital technology. Our society is a "digital society": 76% of the French use the Internet every day, whereas only 12% are not netizens. Smartphones have proliferated in the past few years, and are now the device (before computers) most frequently for connecting to the Internet. Users are cautious and informed, and the development of digital technology depends on the confidence they have in it: the protection of personal data, the quality and reliability of information, the security of payment systems, etc. The Internet has become a condition for social integration: 76% of respondents are ready to adopt new forms of technology or new digital services.

## The Digital Barometer Survey, created in 2000, now an established reference source

Every year since 2000, the CGE (Conseil G n ral de l' conomie) orders a poll on the diffusion of information and communications technology (ICT) in France. Its partners for this survey are, since 2003, the Regulatory Authority of Electronic Communications and the Post Office (Autorit  de R gulation des Communications  lectroniques et des Postes) and, since 2016, the Digital Agency (Agence Num rique).<sup>1</sup> This survey provides a regular follow-up on electronic devices and their uses while taking notice of new equipment and uses.

Year after year, this survey's publication arouses discussion in newspapers and magazines, as well as in the specialized press. The results are often cited to describe the digital state of France. Since this survey has been repeatedly conducted over 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.<sup>2</sup>

This survey's strong point is its reliability. Face-to-face interviews are conducted with a large sample of persons (2209 in 2017) twelve years old and older who have been selected using the quota sampling method. The results are adjusted to be representative of the French population. Face-to-face questioning provides a better description of the country's sociodemography by level of education or income and an improved quality of responses to questions about ICT.<sup>3</sup> Owing to the data collection method and the sample's size, a detailed analysis can be made 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.

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<sup>1</sup> This article has been translated from French by Noal Mellott (Omaha Beach, France). The translation into English has, with the editor's approval, completed references.

<sup>2</sup> The data on <https://www.data.gouv.fr/en/data.gouv.fr>; and the reports on the CGE's website. The most recent report, *Barom tre du num rique 2017* can be found via:

<https://www.economie.gouv.fr/cge/barometre-numerique-edition-2017>. All graphs come from this report.

<sup>3</sup> CROUTTE P., DAUDEY E., HOIBIAN S., LEGLEYE S. & CHARRANCE G. (2015) "Une approche de l'effet du passage sur Internet d'une enqu te en population g n rale", *Cahier de recherche*, C3213, December, pp. 1-60. Available via: <http://www.credoc.fr/publications/abstract.php?ref=C323>.

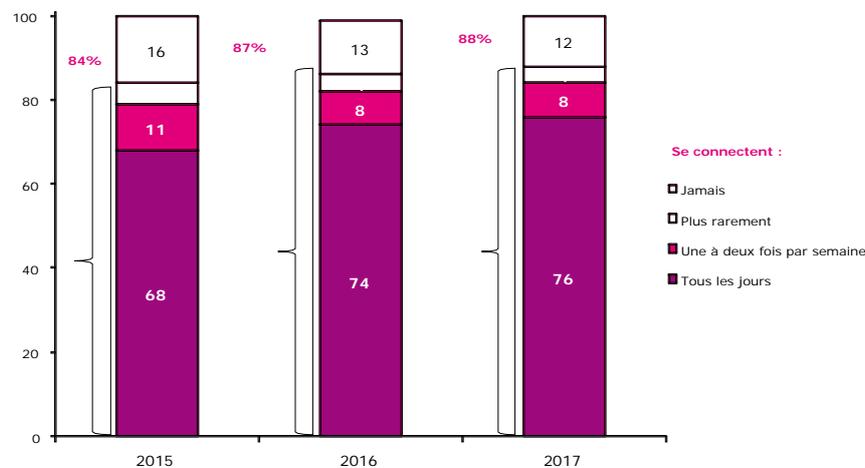
The findings of the 2017 survey are presented herein in the present tense. Some uses of ICT have not been measured every year. In this case, they will be discussed using results from earlier surveys. Unless indicated otherwise, the statistics presented concern persons more than 12 years old.

## France: A “digital society”?

Digital technology soon found a place in the everyday life of the French population. In 2004, 56% of the population thought that the Internet was a tool that made everyday life easier. In 2007, “half of the population were using personal computers every day” (in fact, 49%). By 2010, 75% of people with an at-home Internet connection were using it daily. In 2013, idle periods of time (for waiting or in public transit) were occupied with mobile (cell) telephones (47%), texting or e-mail (49%) and, already, by browsing on the Internet (26%).

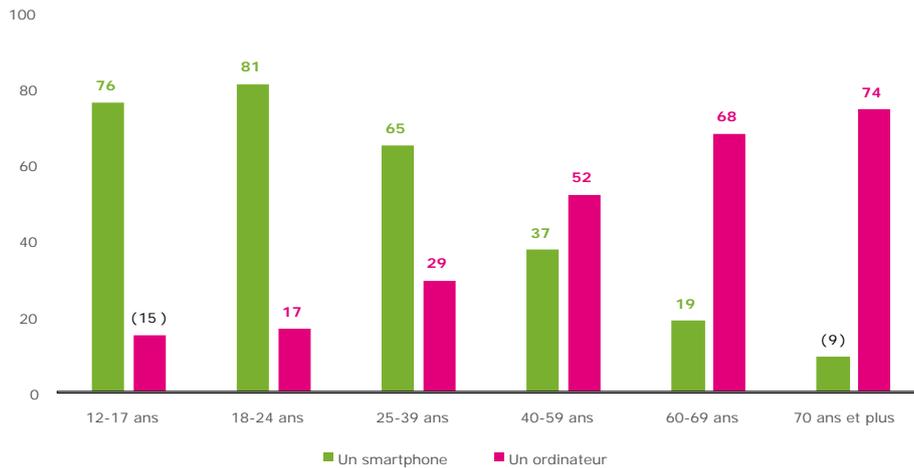
The French see themselves as living in a digital society, since a large majority now (in 2017) own and use digital devices. While the use of the usual ICT equipment, such as personal computers (81%) and landline access to Internet at home (85%), holds steady, we observe a proliferation of tablet computers (44% as compared with 4% in 2011) and smartphones (73% vs. 17% in 2011).

The percentage of netizens has increased regularly, up to 88% in 2017. Nearly all persons under the age of 40 years are connected to the Internet: but only a little more than half of the persons without diplomas (52% as compared with 88% for persons with the BEPC middle school certificate) or of persons over the age of 70 (53% but 81% of 60-69 year-olds). The proportion who connects daily has now reached 76%.



**Graph 1:** How often do you connect to the Internet? (% of persons more than twelve years old in 2017)

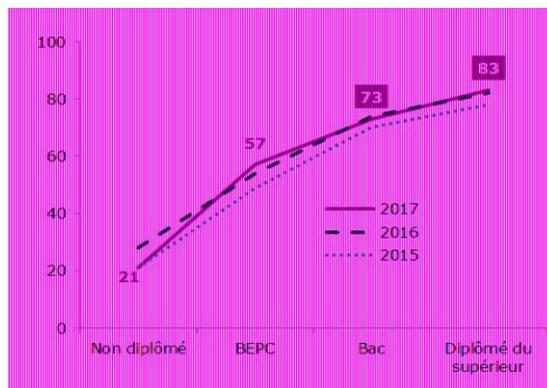
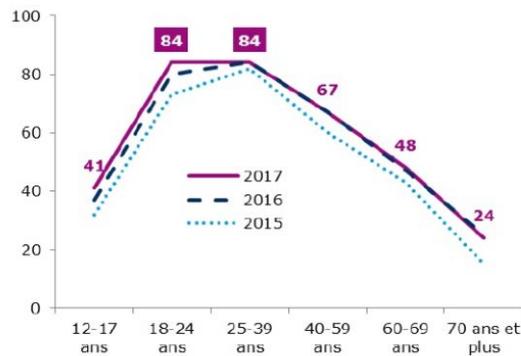
Computers are considered to be somewhat more useful than smartphones: very useful by 60% and useful by 27% as compared with smartphones, respectively 58% and 20%. However smartphones (42%) have become the most frequent means of connection to the Internet, followed by personal computers (38%); but differences by age and by use can be observed. In effect, smartphones are more often used for the social media; and personal computers, for work. The persons who use mobile phone every day represent 79% of the population.



**Graph 2:** How do you usually connect to the Internet? (% of persons connected in 2017).

## Increasing uses: Administrative procedures, the social media, e-business

Accomplishing administrative formalities on line has risen to 67% (from 62% in 2016). This concerns 90% of persons with a higher education and of 25-39 year-olds. E-business involves 61% (60% in 2016), and “sharing” rose from 19% in 2015 to 28% in 2017. Three sorts of actions are considered to be procedures accomplished with the public administration on line: obtaining information, downloading or filling in forms, and filing tax declarations.



**Graph 3:** Proportion of individuals (twelve years old and older in 2017) who have made purchases on line by age and by diploma

Age is a differentiating factor: young people are forerunners and “prescribers” in matters of digital technology. For instance, the proportion of interviewees who made purchases on line decreases with age (except in the 12-17 age-group). Level of education is a major factor.



**Graph 4:** The longer the time since people started using the Internet, the more often they accomplish administrative formalities on line (% of persons 18 years old and older in 2017). Three sorts of actions are considered to be procedures accomplished with the public administration on line: obtaining information, downloading or filling in forms, and filing tax declarations.

The longer the time since gaining access to the Internet, the more diversified and intense the uses. In 2016 for instance, 72% of persons with at-home access to the Internet for more than ten years had accomplished at least one administrative formality on line, as compared with 17% of persons without access.

The participation in social media is now 59% (56% in 2016). This increase can largely be set down to persons over the age of 40. Among those who used the social media in 2015, 71% also used the social media as a source of news (compared with 54% in 2012).

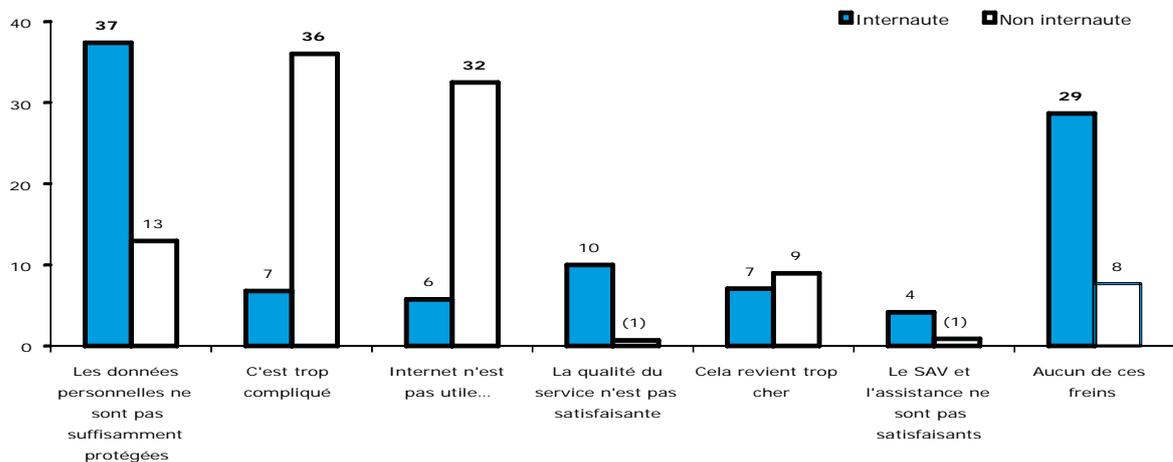
## The growth of the digital economy depends on the confidence of users, cautious and informed

Although people are increasingly using the Internet, they are still wary. For example, 49% have refrained from posting a message or have deleted a message on the social media in order to protect their privacy. Confidence in the information relayed over the social media is limited: 44% have little confidence; and 29%, none. According to the Standard Eurobarometer in 2016, the French ranked second in Europe with respect to wariness toward the social media:<sup>4</sup> 74% tended to not have confidence in these media, a percentage that, just behind the Swedes (75%), compares with an EU average of 59%.

This trend reaches back in time, even though confidence is the very basis for the development of digital technology. Already in 2003, the Digital Barometer stated that “more than six million people have already made purchases via the Internet, but the question of the security of payments is a problem: it is the first cause of reluctance.” In 2008, “77% of persons who own a

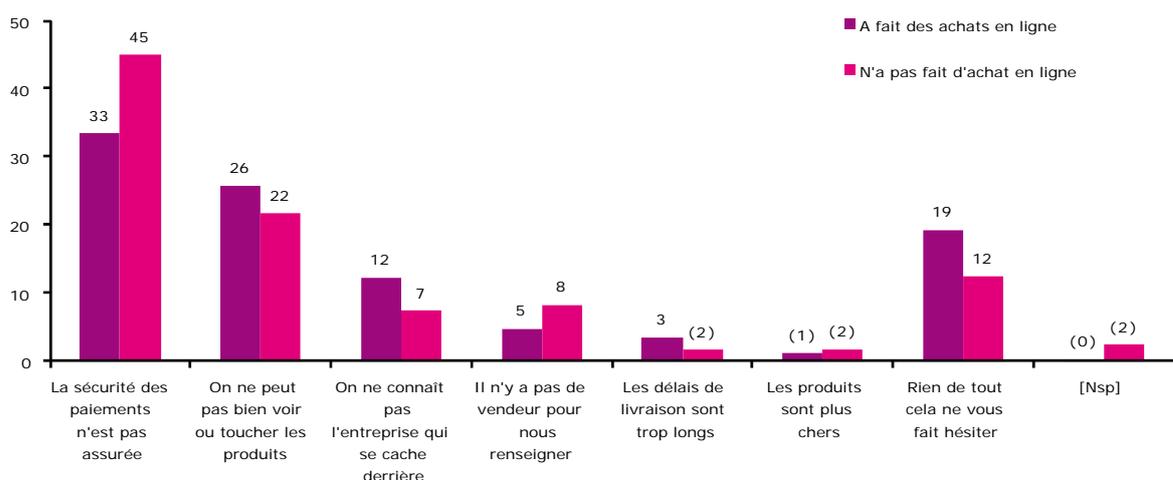
<sup>4</sup> European Commission (November 2016), *Standard Eurobarometer 86: Public Opinion in the European Union*, 214p. Available via: [http://data.europa.eu/euodp/en/data/dataset/S2137\\_86\\_2\\_STD86\\_ENG](http://data.europa.eu/euodp/en/data/dataset/S2137_86_2_STD86_ENG).

mobile phone and are informed of the possibility [of tracking someone via his/her cell phone] would like to be able to keep this localization from being transmitted to businesses.” In 2014, “47% of cybernauts are persuaded they have been the victim of an unwanted access to their personal data, either by a direct intrusion via the Internet (on their computer, tablet or smartphone) or indirectly at their company (Internet operators, e-business websites, etc.) which has data on them.” In 2014, 33% of the population and 37% of cybernauts thought that the main drawback to using the Internet was insufficient protection of personal data.



**Graph 5:** Main drawbacks to using the Internet (% of persons 12 years old and older in 2014): insufficient protection of personal data, too complicated, not useful, unsatisfactory service, too expensive, unsatisfactory help and after-sale services, none of these.

People are taking precautions with digital technology: 17% have turned their mobile phones off to avoid being tracked; 46% have tried to erase traces of browsing on the Web (for example, by deleting cookies); 58% have abandoned browsing an unsafe web page (warning from the browser, or the absence of “https” or the lock icon); 63% have refused to be geolocated when opening a web page or an application; 66% have, in order to protect their personal data (address book, photos, agenda), forgone installing an application. In all, 81% of the population has taken at least one precaution; but the average of precautions taken is four. This holds even more for 18-39 year-olds.

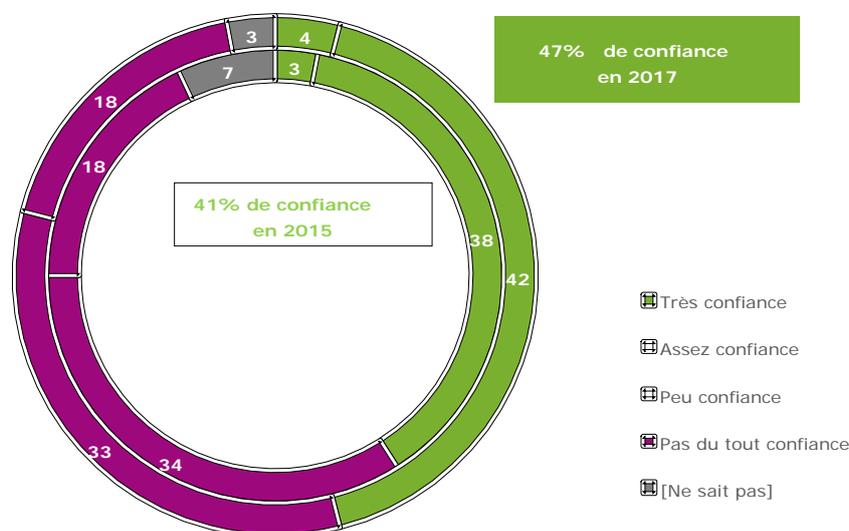


**Graph 6:** Among the following reasons, which is now the most important when you hesitate about making a purchase on line? (% of persons more than 12 years old in 2017): insecure payment system, not able to see or touch the products, do not know the company behind the product, no salesperson for information, delivery dates are too long, the products are expensive, none of these.

Whether or not to make an on-line purchase heavily depends on confidence: confidence in the scores, comments and assessments that are posted on the Internet (79% of persons very confident make on-line purchases compared with 35% of those who have no confidence at all) and, too, confidence in other persons (71% vs. 58%). The first drawback to making a purchase online, in particular for those who do not make on-line purchases, is doubts about the security of online payment systems (38% in 2017 as compared with 36% in 2016). Likewise, 59% have already given up on making a purchase because they confidence faltered at the time of payment.

“Sharing” practices depend just as much on confidence, since 40% of the persons very confident in the scores, comments and assessments made on the Internet also participate in exchanges of goods or services among private persons, as compared with 13% of those who have no confidence. It also depends on confidence in other persons: 40% of those who have confidence in others are involved in such exchanges compared with 25% of those who lack confidence.

Confidence in the scores, comments and assessments made on line increased six points between 2015 and 2017. But much more progress is yet to be made since the majority of the population still lacks confidence.



**Graph 7:** Confidence in the scores, comments, assessments made of hotels, restaurants and products that can be lent, bought or rented on line (% of persons more than 12 years old in 2017)

## Digital technology increasingly affects the world of work

A quarter of the population (26%), on the average, has used the Internet for job searches. This percentage is 48% among blue-collar workers, 70% among 18-24 year-olds and 79% among the unemployed. In 2016, the Internet was thought to be a useful tool for job offers: 72% as compared with 61% in 2001 — the proportion of negative opinions fell from 31% to 22% during the same period. Among those who searched for job offers on line, 92% found the Internet useful, as compared with 65% of those who did not search on line.

The daily use of a computer at work rose from 46% to 54% from 2013 to 2017. A small majority of those who work feel that ongoing job training is a good preparation for using the new technology: 21% have very favorable opinions and 30% favorable opinions. In fact, 34% of those working bring their own “devices” (smartphones or tablets) to use at work; and a majority (54% vs. 42% in 2013) consider that the new technology makes it easier to balance one’s occupational and private lives. This holds especially for those who consult their electronic messages on their mobile phones (59%) and those who bring their own devices to work every day (62%).

The preference for telework (e-work at home) increased eight points between 2009 and 2017 to reach 39%: 13% are ready to work full-time in telework, and 26% now and then.

## The digital groundswell

The digital tidal wave has unfurled over the whole country. In 2011, 41% of netizens declared that it was hard to do without the Internet for more than three days; and 46% of the persons equipped with a laptop or tablet with a touchscreen took it on vacation. By 2016, one out of two declared that they could not do without the Internet for more than two or three days (an increase by 9% in five years); and 14% of them even set the time at a few hours; and another 14%, at one day. Also in 2016, two out of three persons thought that having access to the Internet was important for a feeling of belonging in society (specifically 65% compared with 54% in 2009); and 40% of those who were not cybernauts were, nonetheless, persuaded of the importance of the Internet (+12 points from 2009 to 2016); and 50% of those over the age of 70.

This digital groundswell does not isolate individuals in a virtual realm. Contrary to what is assumed, digital activities and an active social life go hand in hand. In 2014, 40% of the persons surveyed had found old acquaintances via the Internet; 27% established relations with new persons, and 10% had a romantic encounter. In all, nearly one out of two persons (47%) augmented their circle of relationships thanks to the Internet. The 2014 survey found that the time spent on the Internet was correlated with an active social life. Those persons who had friends come to their home every day spent 19 hours per week on the Internet, whereas those who never had company in their homes spent 9 hours.

As the 2017 survey shows, the French population is ready to plunge even farther into the digital realm: 76% of persons are ready to adopt new digital services or devices.