



Information and communication technologies take-up in French society

Report produced by CREDOC

on behalf of

***the General Council on Industry, Energy and Technologies
(CGIET)***

and

The Electronic and Postal Regulatory Authority (ARCEP)

Press conference

11 December 2009

Methodology

Main points

Face-to-face survey carried out in June 2009

With a group of 2,220 people representative of the population 12 years of age and over, in two distinct samples:

- 2,008 people, ages 18 and up
- 212 people, ages 12 to 17

Describe individual (and not household) equipment and consumption habits.

This is the ninth year this survey has been performed.

Equipment and connections

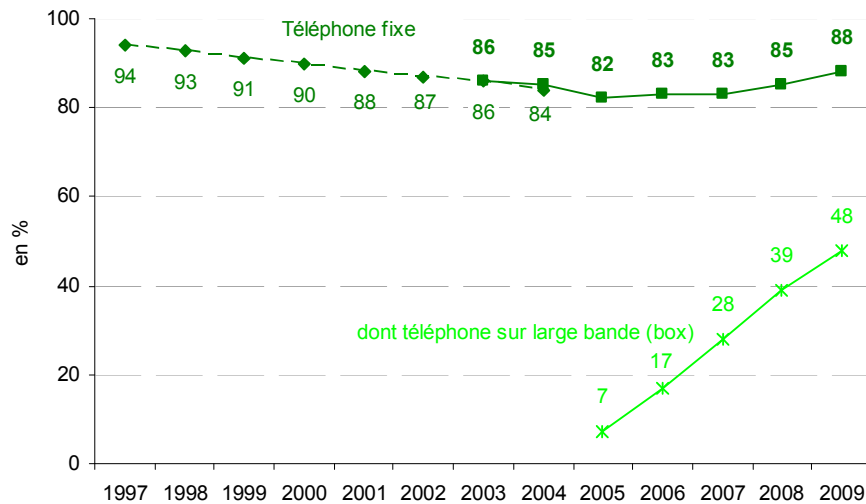
- Once again, a strong increase in connections to fixed and mobile networks
- Dual, fixed and mobile equipment tending to become more commonplace
- Access to VoIP through bundled solutions now a proven success
- Relatively homogeneous rise in mobile equipment levels
- A growing number of people have more than one computer, with laptops increasingly popular
- Internet access in the home has risen sharply once again, and more and more people are using the mobile Internet
- Disparities in Internet access levels are shrinking
- Growing number of ways to access TV at home

Once again, a strong increase in connections to fixed and mobile networks mobiles

Telephone equipment level

- The number of people with both a fixed line at home and a mobile line rose significantly again in 2009: + 3 points for fixed, + 4 points for mobile.
- 48% of people make their calls using an IP box, or 9 points more than last year.
- The fixed calling revival has been spurred by broadband access solutions.

Accès aux services fixes



Equipement en téléphone mobile



Le trait pointillé correspond au champ des 18 ans et plus, le trait plein aux 12 ans et plus

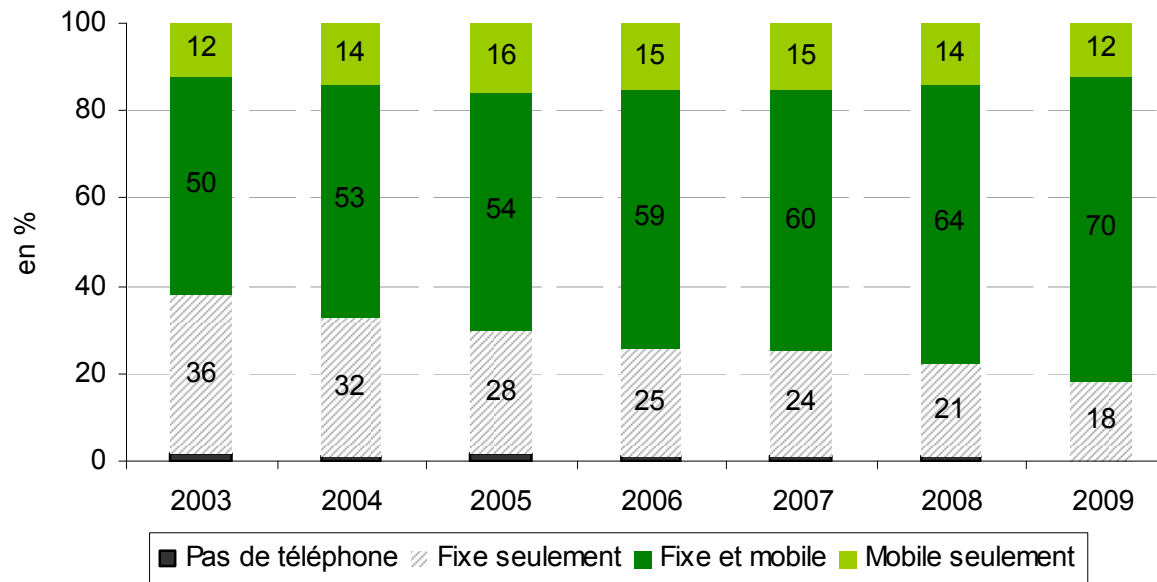
Dual, fixed and mobile equipment tending to become more commonplace

Telephone equipment level

- 70% of people over the age of 12 now have both fixed and mobile equipment.
- Only 12% of people now have only a mobile phone, 2 points less than last year, and back to where it was in 2003.

Equipement en téléphone fixe et mobile

Champ : 12 ans et plus



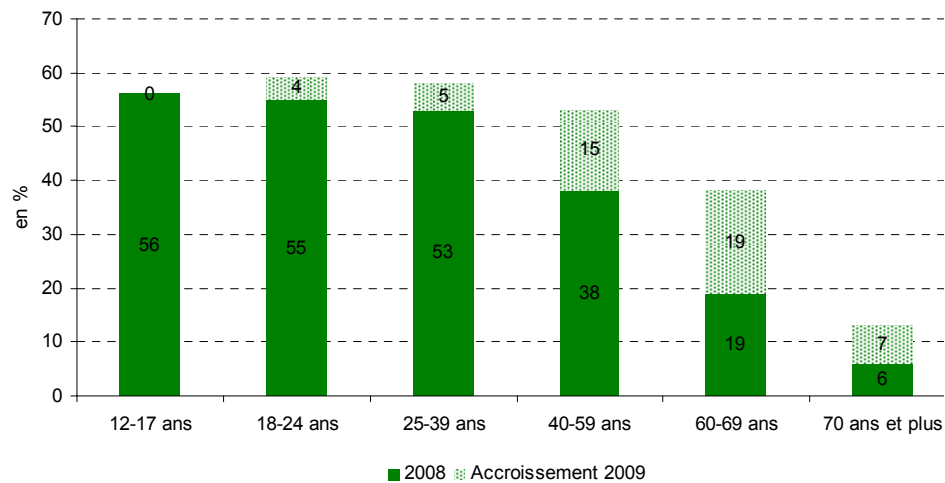
Access to VoIP through bundled solutions now a proven success

Telephony over broadband

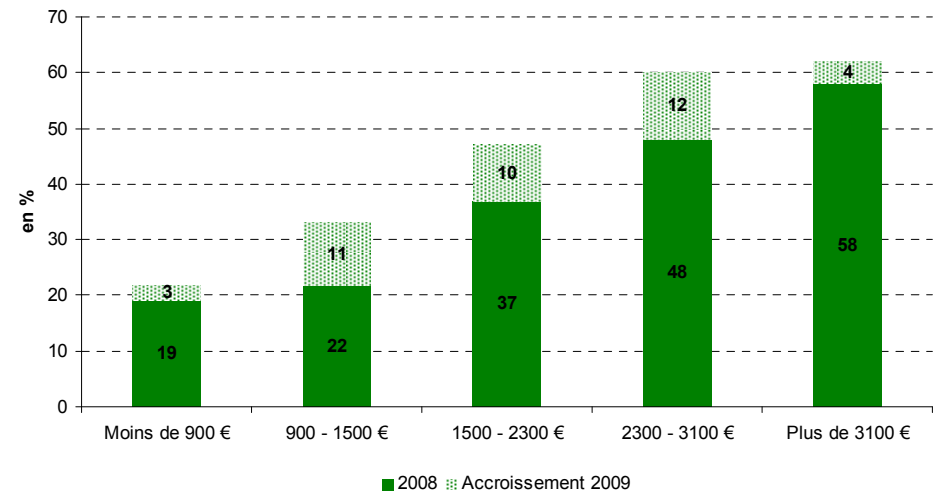
- 48% of people make their calls using an IP box, or 9 points more than last year.
- Telephony over broadband being used more by older generations.
- Increasingly prevalent in high-income households.

Residential access to broadband telephony

selon l'âge



selon le revenu du ménage

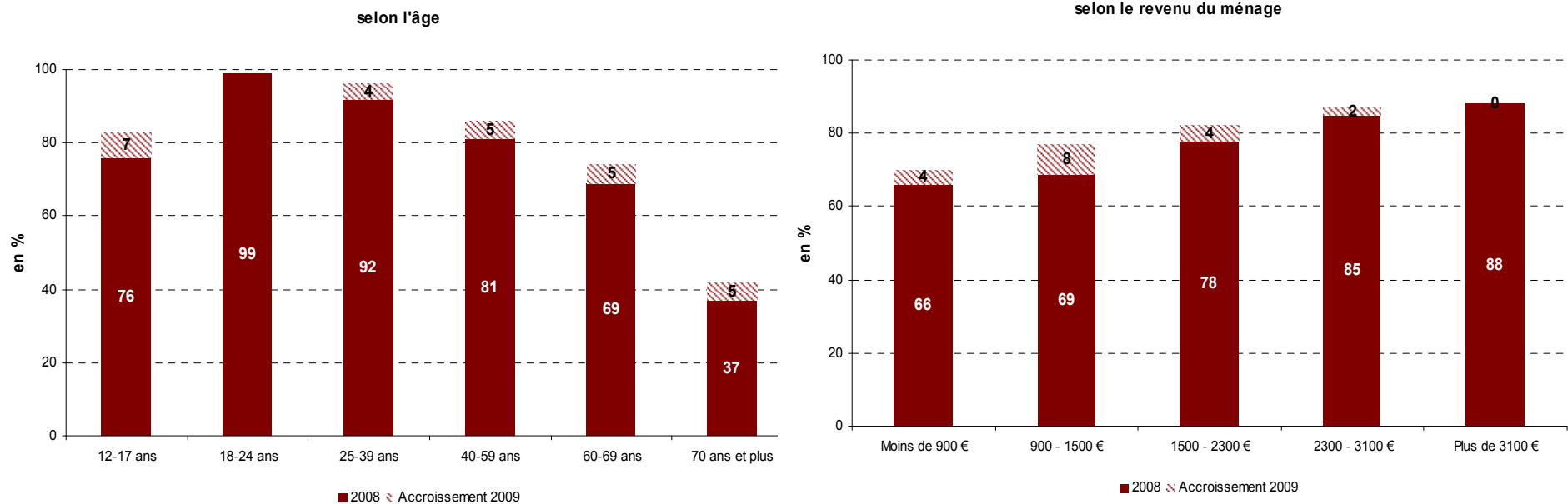


Relatively homogeneous rise in mobile equipment levels

Mobile telephony

- Relatively homogeneous rise in mobile equipment levels in the different age categories.
- As a result, there is still room for growth amongst the oldest generations: "only" 74% of people aged 60 to 69 have a mobile phone, and only 42% for those over the age of 70.

Mobile phone equipment levels



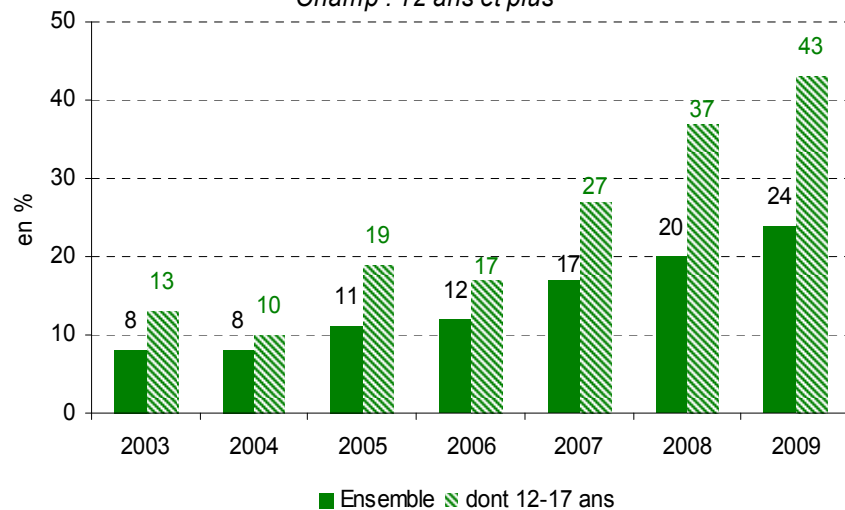
A growing number of people have more than one computer, with laptops increasingly popular

Computers

- 24% of all people age 12 and up live in a household with several computers, and 43% for the youngest among them (ages 12 to 17).
- Moreover, of the 74% of people who have a computer at home, close to half have at least one laptop.
- NB: not included here are Internet-ready micro-computers or smartphones.

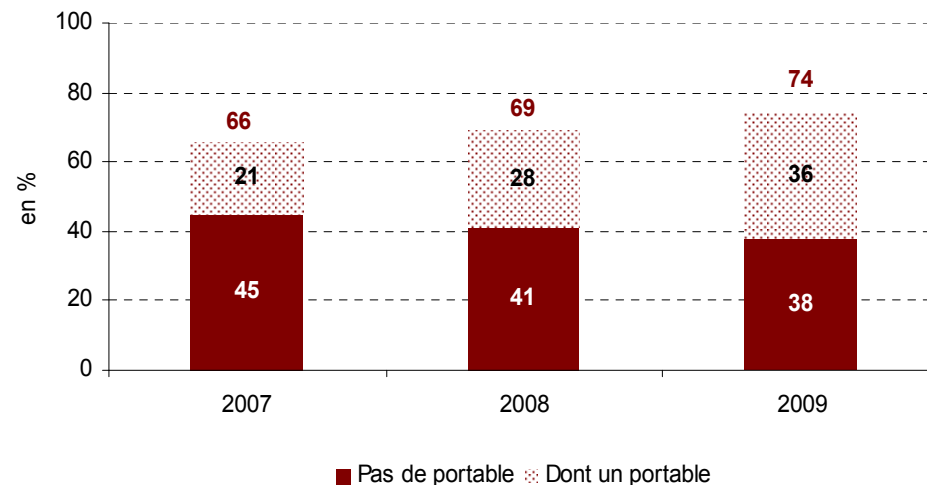
Multi-équipement en ordinateurs à domicile

Champ : 12 ans et plus



Personnes disposant d'un ordinateur à domicile

Champ : 12 ans et plus

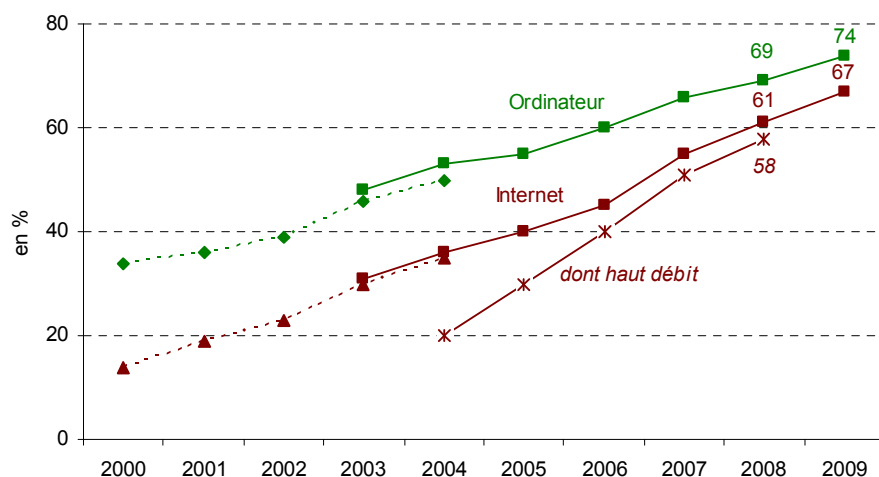


Internet access in the home has risen sharply once again, and more and more people are using the mobile Internet

Internet

- The percentage of "active" Internet users rose by 7 points in 2009.
- Two-thirds of all people age 12 and up have Internet access at home, which marks a substantial increase over the year before (+ 6 points).
- Residential access is the biggest growth driver.
- Mobile Internet use is rising, with growth especially strong amongst young users and business executives.

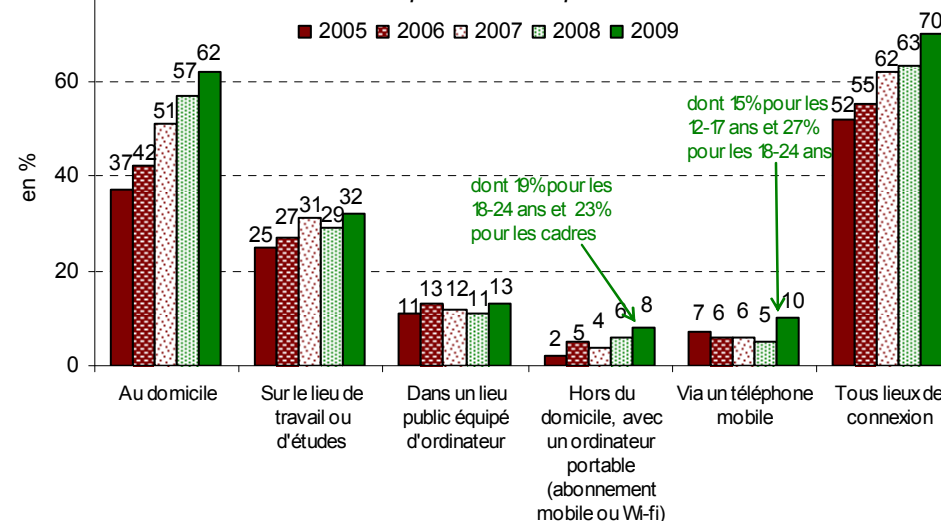
Equipement en micro-ordinateur et accès à internet au domicile sur les réseaux fixes



Le trait pointillé correspond aux 18 ans et plus, le trait continu aux 12 ans et plus

Modes de connexion à Internet

Champ : 12 ans et plus



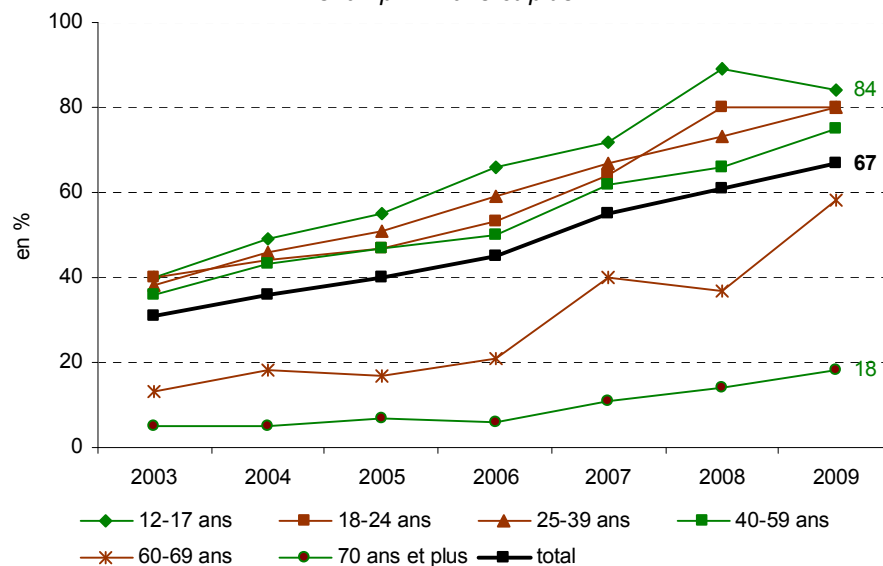
Disparities in Internet access levels are shrinking

Internet

- Disparities in Internet access levels at home are gradually diminishing.
- In terms of age group, household equipment levels amongst people ages 60 to 69 are close to the average.
- In terms of income level, there are still inequalities, but they are decreasing. Close to 40% of the lowest income people now have Internet access at home, and 7% of people living in household with a monthly income of under €900.

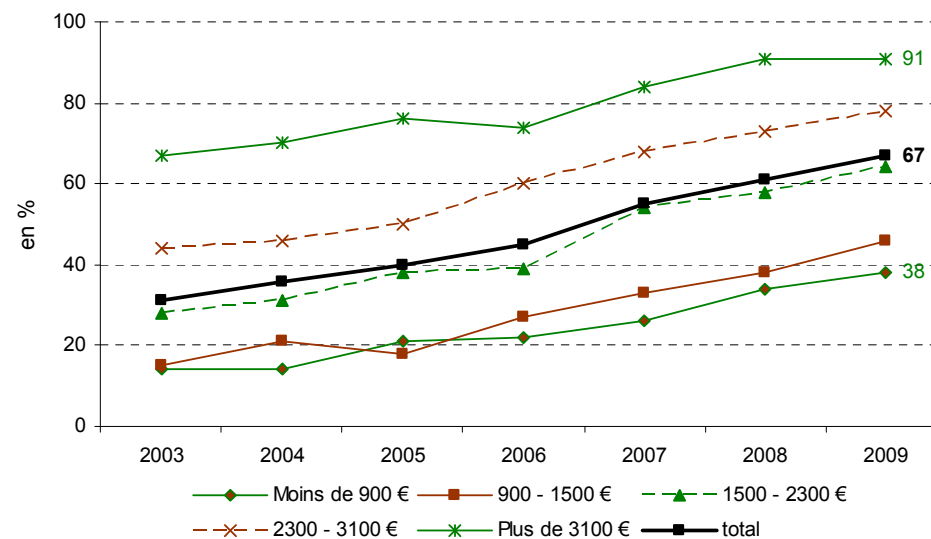
Accès à Internet au domicile selon l'âge

Champ : 12 ans et plus



Accès à Internet à domicile selon le revenu mensuel du foyer

Champ : 12 ans et plus

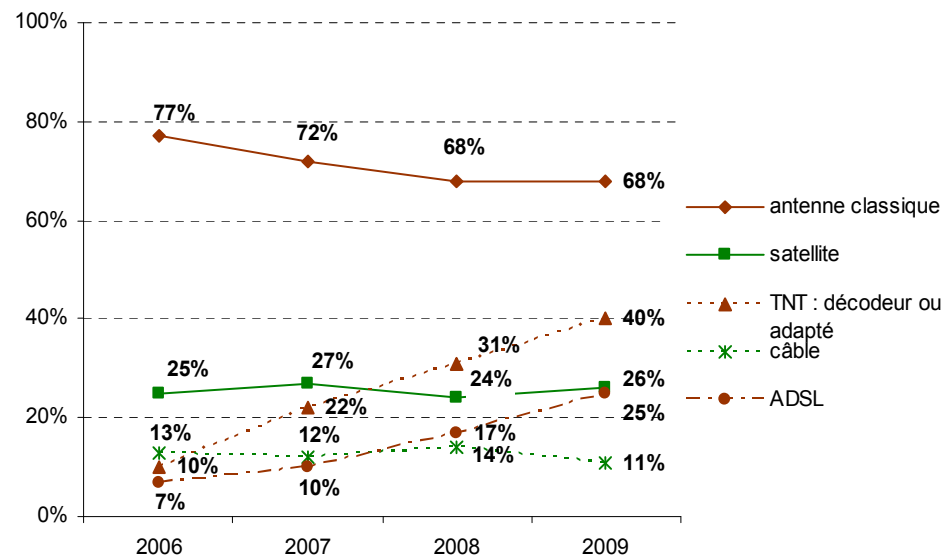


Growing number of ways to access TV at home

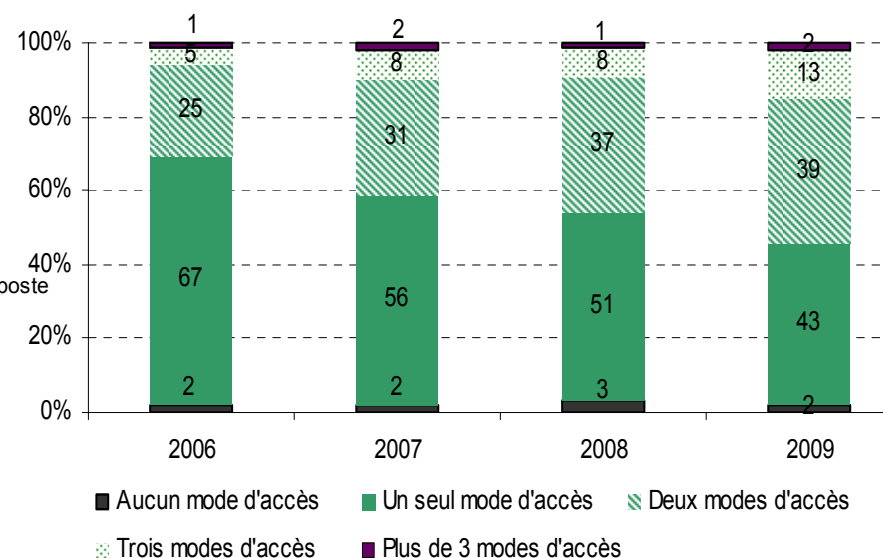
Television

- Increasing diversity in the means of accessing TV at home.
- DTT (digital terrestrial, either through an STB or a DTT-ready set) continues to spread: accessible by 40% of people, compared to only 10% three years ago.
- Another sizeable rise in the IPTV customer base: 25%, compared to 17% in 2008.
- A growing number of people are using more than one way to access TV programmes, with the average number of access modes increasing. People who watch TV using only one medium (aside from mobiles or the Web) are now the minority (43%).

Accès à la télévision à domicile
champ : 12 ans et plus



Nombre de modes d'accès à la télévision
Champ : 12 ans et plus



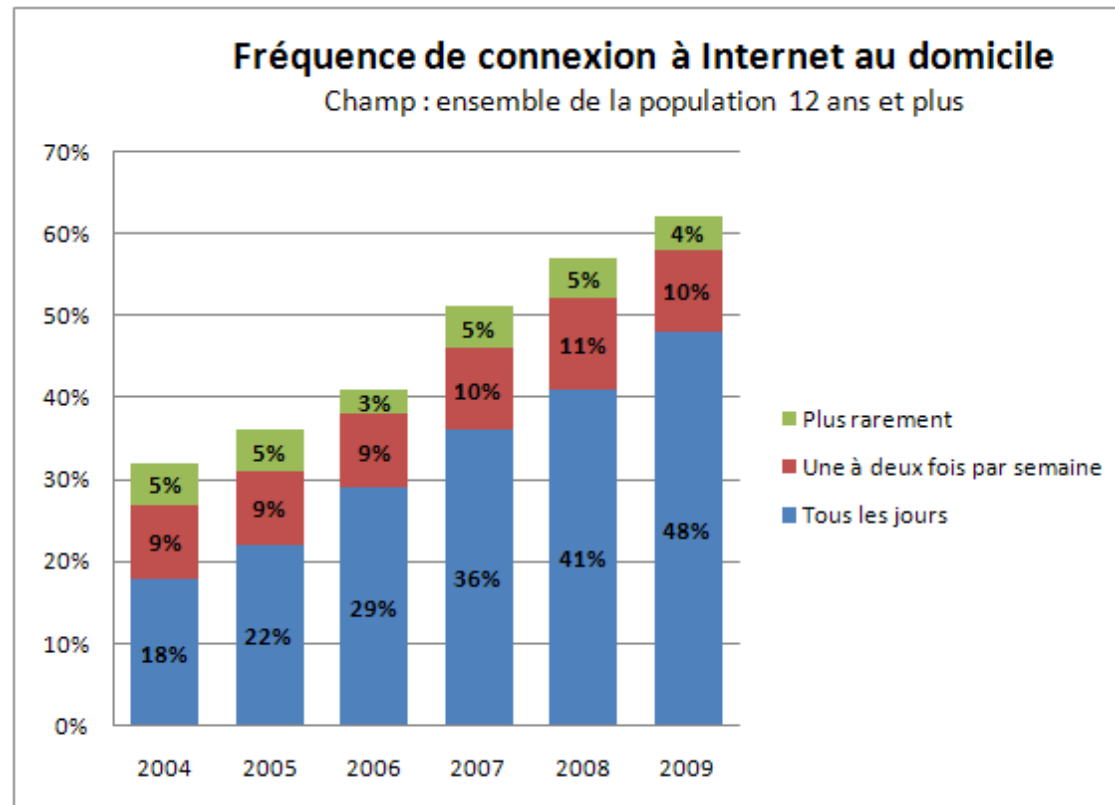
Consumption

- Accessing the Web becoming a daily habit
- Mobile Internet finally taking off
- Mobile TV making strides
- Young people driving the success of text messaging
- Music and film downloads on pause
- e-government being used more and more
- Online shopping increasingly popular
- Established social networking practices raising concerns

Accessing the Web becoming a daily habit

Internet; daily

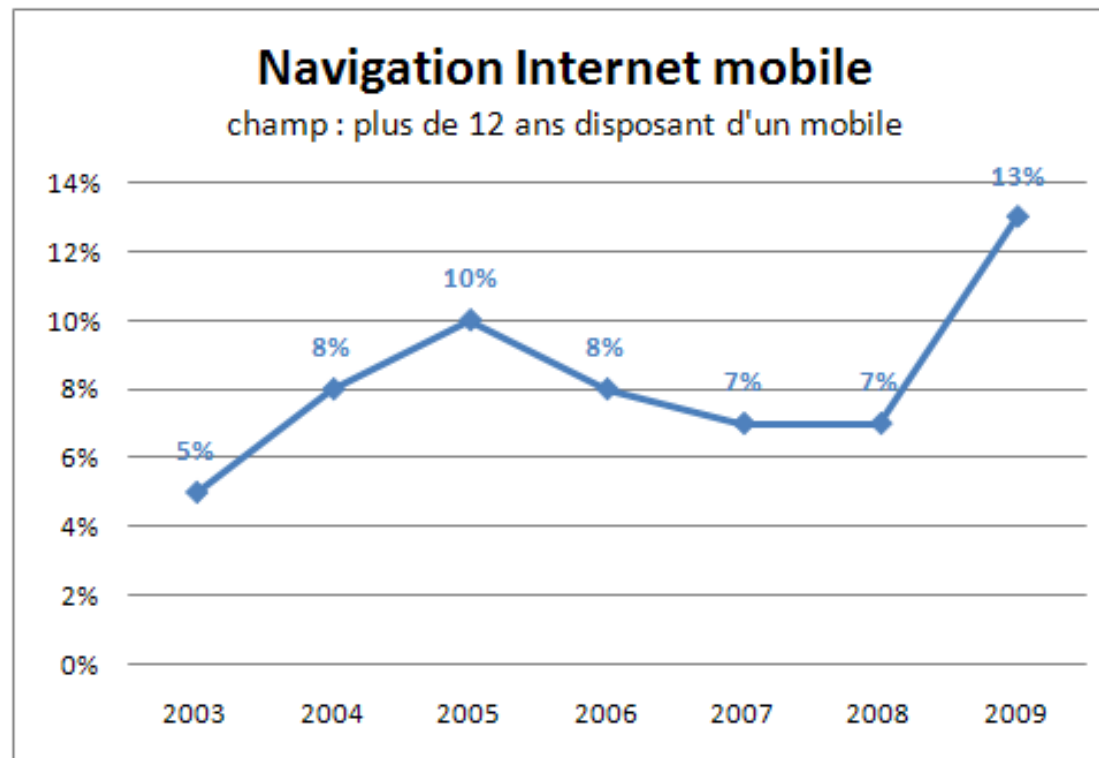
- 48% of people age 12 and over go online every day, a substantial increase over the previous year.
- Among all Internet users, 71% of people age 12 and over go online every day at home, or 5 points more than last year



Mobile Internet finally taking off

Mobile Internet

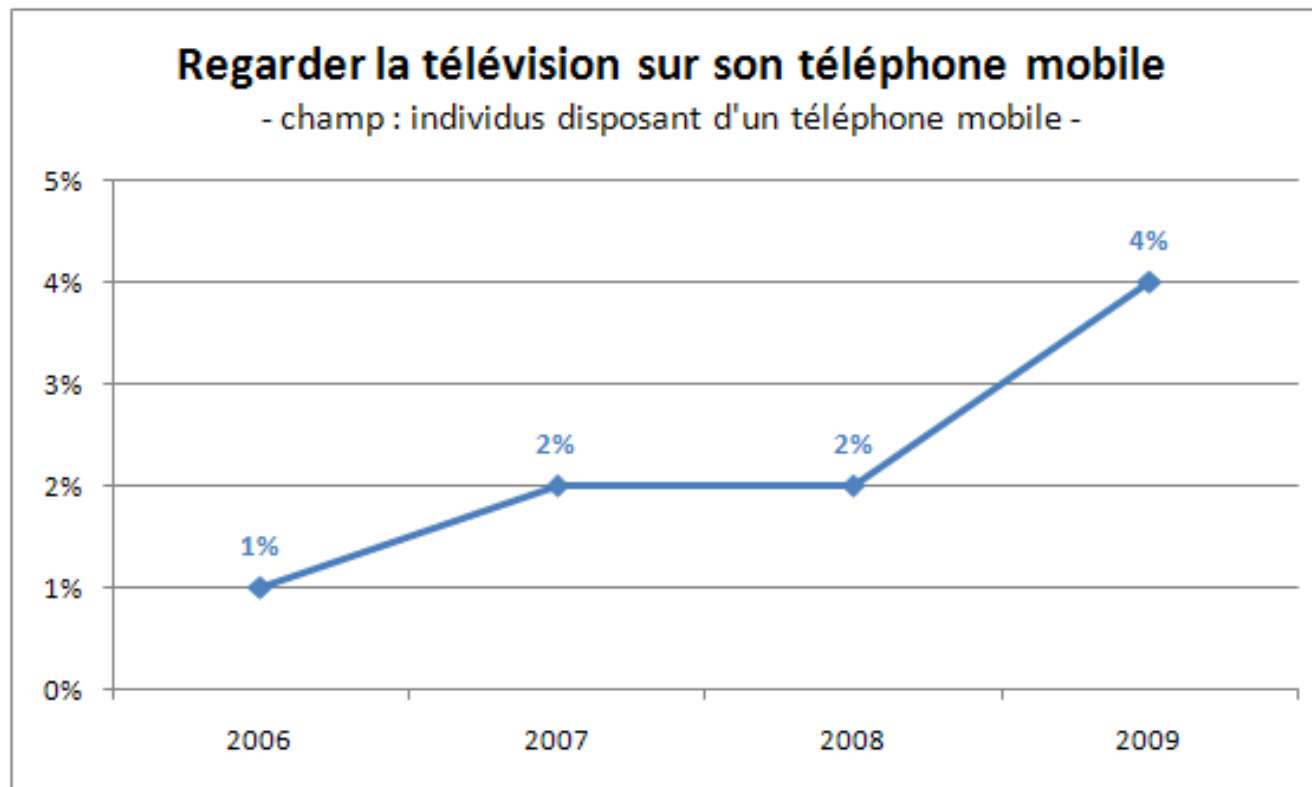
- The number of people who use their mobile phone to access the Internet doubled in one year, to 13%. Between 2008 and 2009, this percentage rose from 12% to 19% amongst teenagers, and from 12% to 27% amongst people between the ages of 18 and 24. A total of around 5 million people are connected to the mobile Internet in France.



Mobile TV making strides

Mobile TV

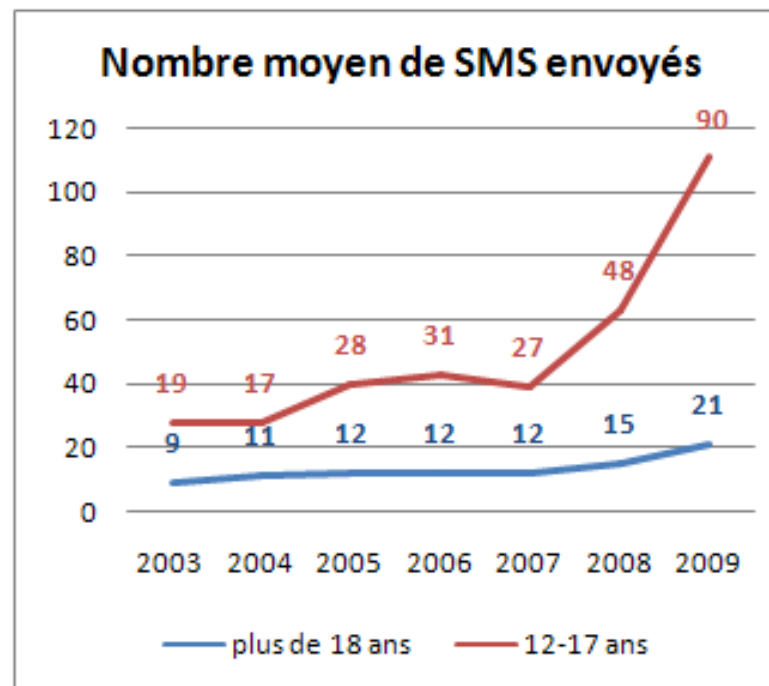
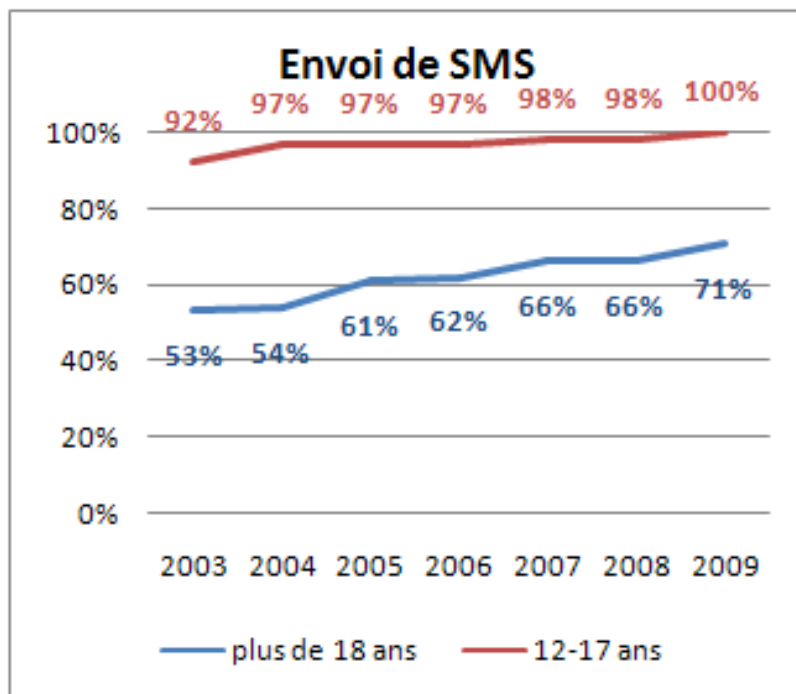
- The proportion of people who watch TV on their mobile phone rose from 2% to 4%. Next year's results will be crucial to properly assessing this new trend.



Young people driving the success of text messaging

Texting

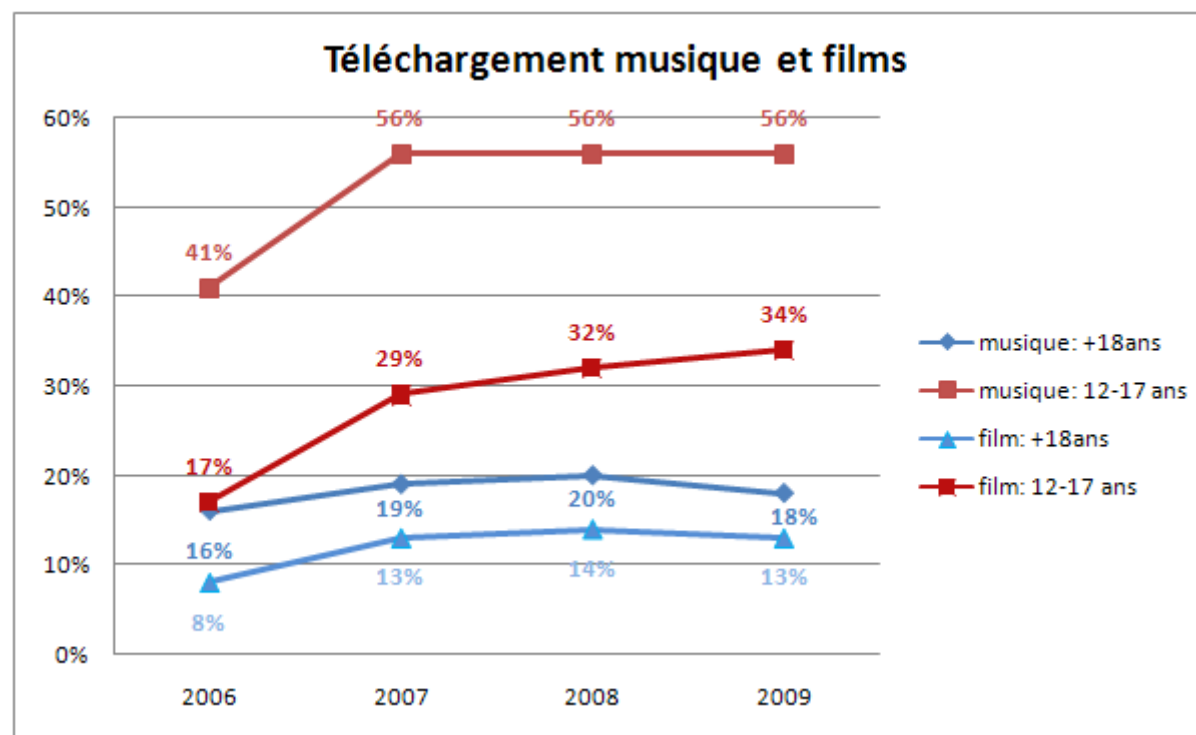
- In June 2009, 71% of adults (+ 5 points from last year) and 100% of adolescents (+ 2 points) equipped with a mobile use text messaging on a regular basis.
- The average number of SMS sent each week is also increasing: from 15 to 21 amongst adults, and virtually doubling amongst teenagers (from 48 to 90). It is entirely likely that the introduction of unlimited SMS offers has had a large hand in this phenomenon.



Music and film downloads on pause

Downloads

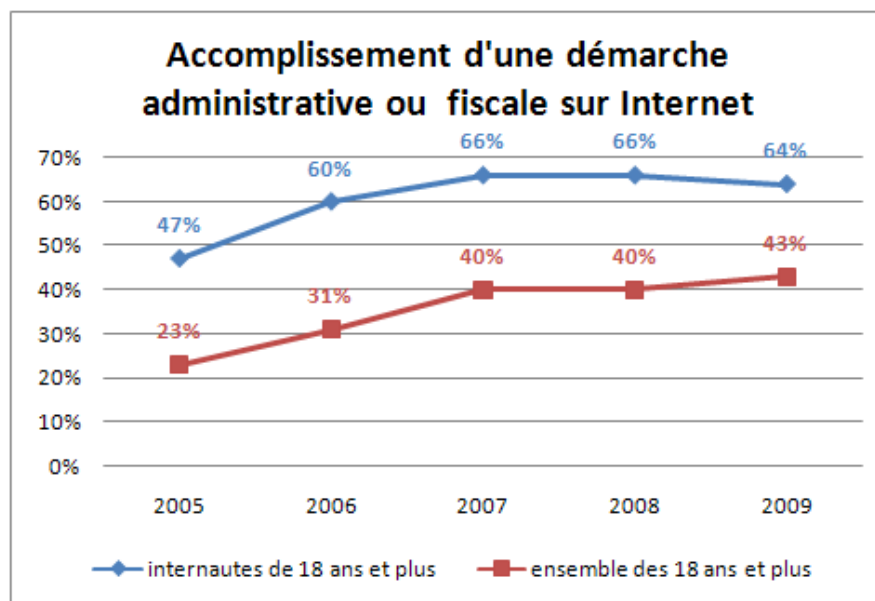
- Downloading by those between the ages of 18 and 24 has dropped considerably: between 2008 and 2009, the number of people in that age group (traditionally the heaviest practitioners) who download decreased from 59% to 53% for music, from 47% to 36% for films and from 56% to 50% for software.



e-government being used more and more

E-government

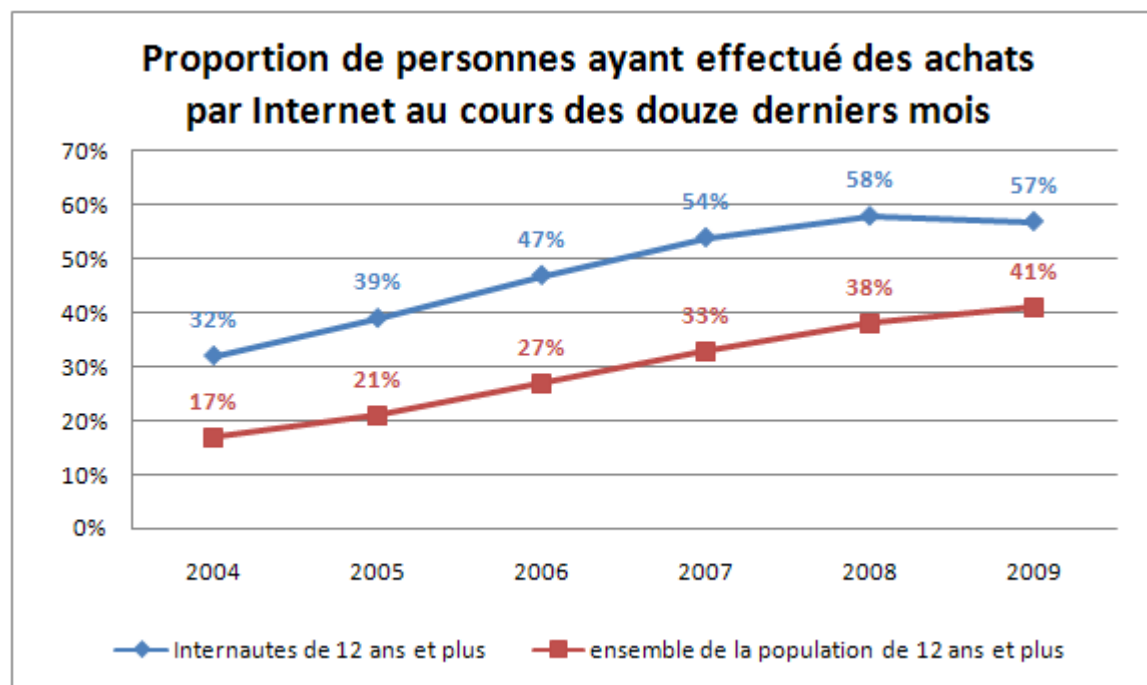
- The number of people who use e-government services or file their taxes online increased by 3 points in 2009: 40% of the population, or 21 million people used an e-government or an online tax service: 67% of those between the ages 25 to 39, but only 29% of people between 60 and 69 years of age. Education level also plays a role, with 73% of university graduates, compared to only 13% with no post-secondary degree, taking advantage of these services.
- Efforts to streamline tax procedures have been fruitful: close to 10 million people (9,700,000) filed their return online this year, or 30% more than in 2008.



Online shopping increasingly popular

E-commerce

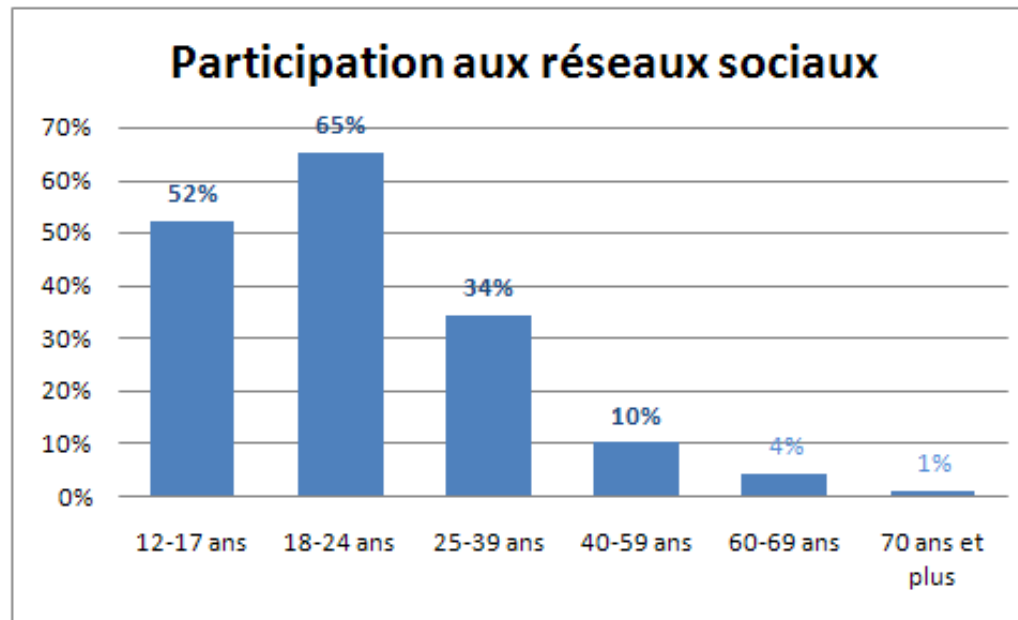
- E-commerce continues to make strides, with 41% of the population, compared to 38% the year before, or 22 million people, now shopping on the Web. Also worth noting is that fewer people have reasons not to shop online (concerns diminishing).



Established social networking practices raising concerns

Social networking and personal data

- 23% of people ages 12 and over are now a member of a social networking site such as Facebook, MySpace or Linked in, or a total of 12 million people in France.
- 82% of the population nevertheless believe that the social networks should make more of an effort to protect their members' privacy, and 93% feel that users should be careful of the information they divulge on social networking sites.



Questions/Answers

- The General Council on Industry, Energy and Technologies, CGIET (*Conseil général de l'industrie, de l'énergie et des technologies*):

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