

THE PLACE OF **INTERNET** IN THE LIVES OF **STUDENTS IN 2021**

SURVEY



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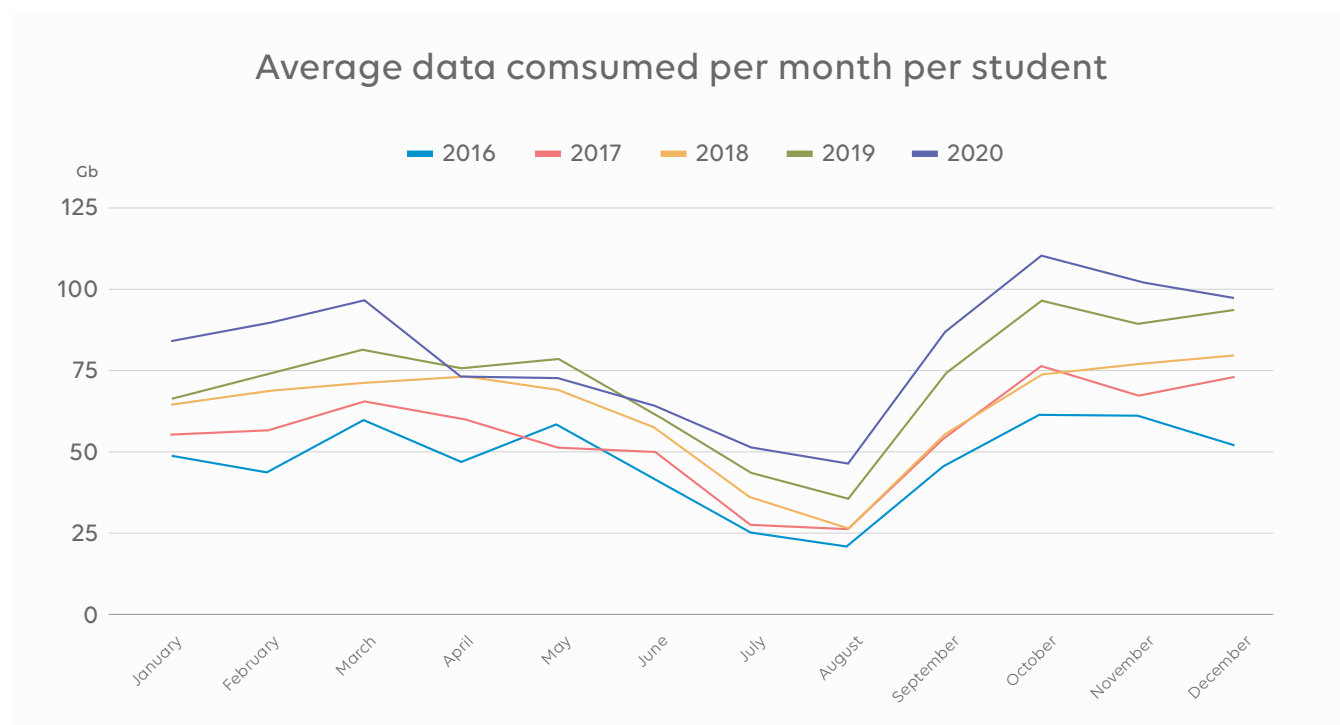
INTRODUCTION

Drawing on its expertise in connectivity and the world of student residences, Wifirst has conducted a survey on the place of the Internet in the lives of students in the midst of an unprecedented health crisis.

For almost 20 years, Wifirst has connected student residences via WiFi. Students' demand for quality of service prompted us to quickly offer a technical solution to meet their needs, in particular to guarantee a high quality of service at peak times.

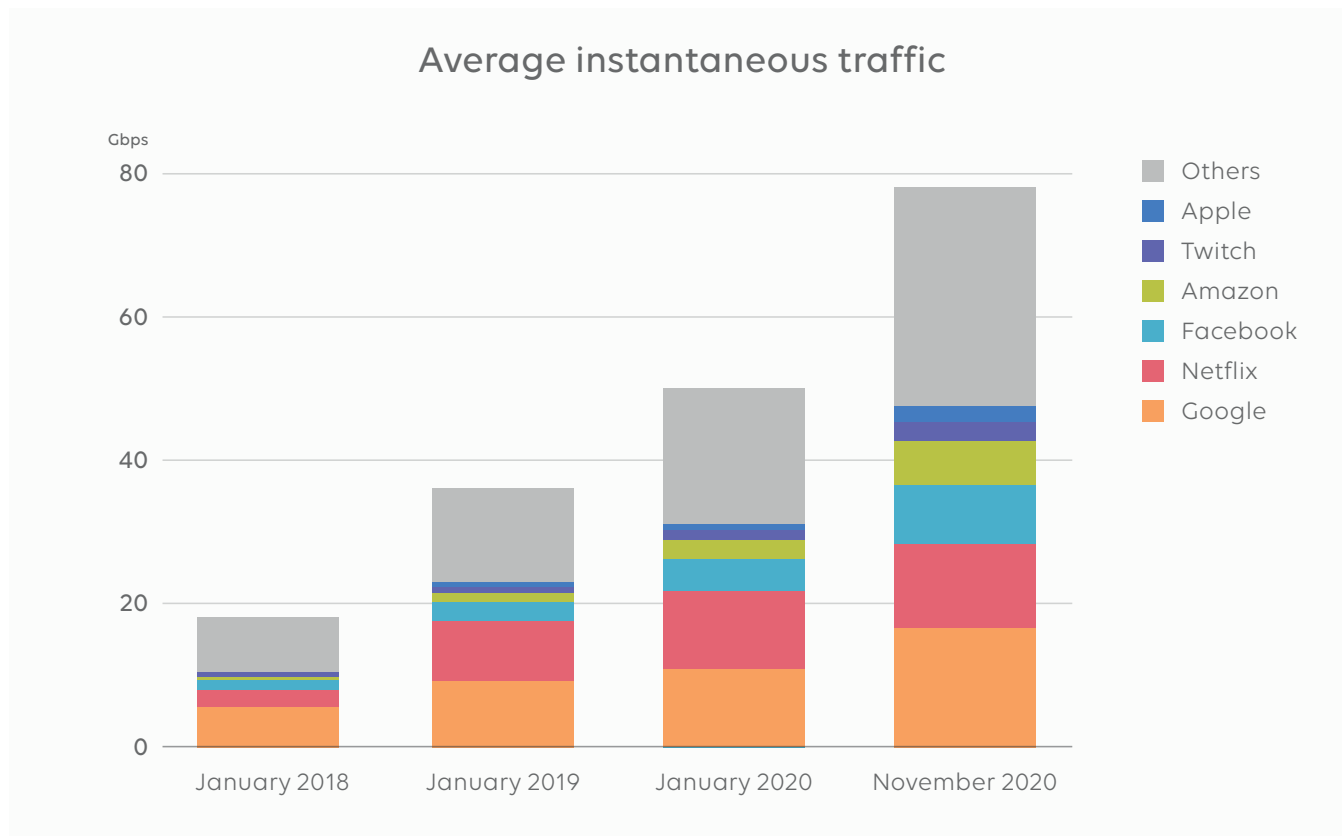
With the explosion of the Internet, we have been at the forefront of the profound transformation in usage, in particular the change in the numbers of pieces of equipment, be they computers, smartphones or tablets, and the phenomenal success of video and audio streaming platforms (Netflix, YouTube, Spotify, Deezer, etc.).

At the end of 2020, students were consuming an average of 100GB of data per month on the WiFi network of their residence (twice as much as 2016).



Each year we see a seasonal effect of student residences emptying during the summer. In 2020, the spring lockdown is visible, with a significant drop in traffic from April. On the other hand, statistics for November 2020 indicate that residences were relatively full, despite the 2nd lockdown, and showed very strong usage.

Unsurprisingly (but still equally impressive nonetheless), **the most popular content providers represent more than half of the traffic on our core network.** The most spectacular progression being that of Netflix, who saw a tremendous increase of millions of new subscribers from the UK and throughout Europe.



With the appearance of Covid-19 and the global pandemic that marked 2020, we wanted to go beyond the figures to better understand the role of the Internet in the lives of students.

If new technologies were already an integral part of daily life for 18-25 year olds, the lockdowns of spring and November 2020 (and more generally all the constraints connected to managing the virus) have revealed the essential role that WiFi plays in day to day life, especially for those living in student residences.

The health crisis has accelerated the digitisation of society in a spectacular way, and higher education has not escaped this movement. Remote learning and exams have become commonplace, making access to a high-performance Internet connection essential for successful studying.

Through the means of this survey, we try to understand and measure the impact that Covid-19 has had on the relationship students have with the Internet, and what it means for their immediate future in an increasingly digital society.

METHODOLOGY

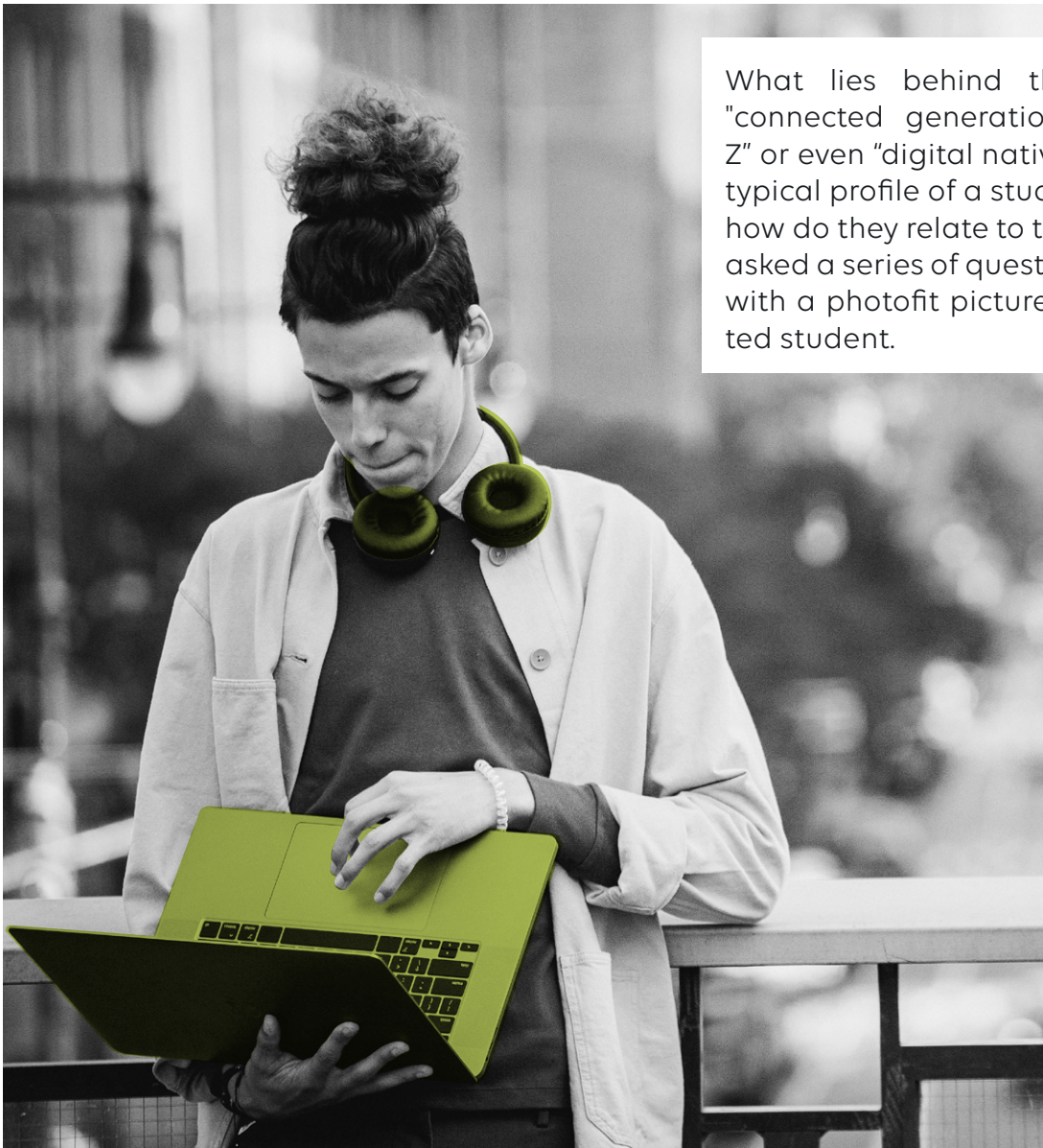
A total of 3,586 students aged between 18 and 25 living in a student residence equipped by Wifirst responded to an online questionnaire containing 38 questions.

A qualitative component of the survey: 10 students agreed to comment on the questionnaire results to provide us with a more personal perspective leading to a thorough understanding of the central issue raised from this study.

The survey was conducted between **23 November and 7 December 2020.**

01

THE CONNECTED GENERATION: CURRENT STATE OF PLAY



What lies behind the expressions "connected generation", "Generation Z" or even "digital native"? What is the typical profile of a student in 2021 and how do they relate to the Internet? We asked a series of questions to come up with a photofit picture of the connected student.

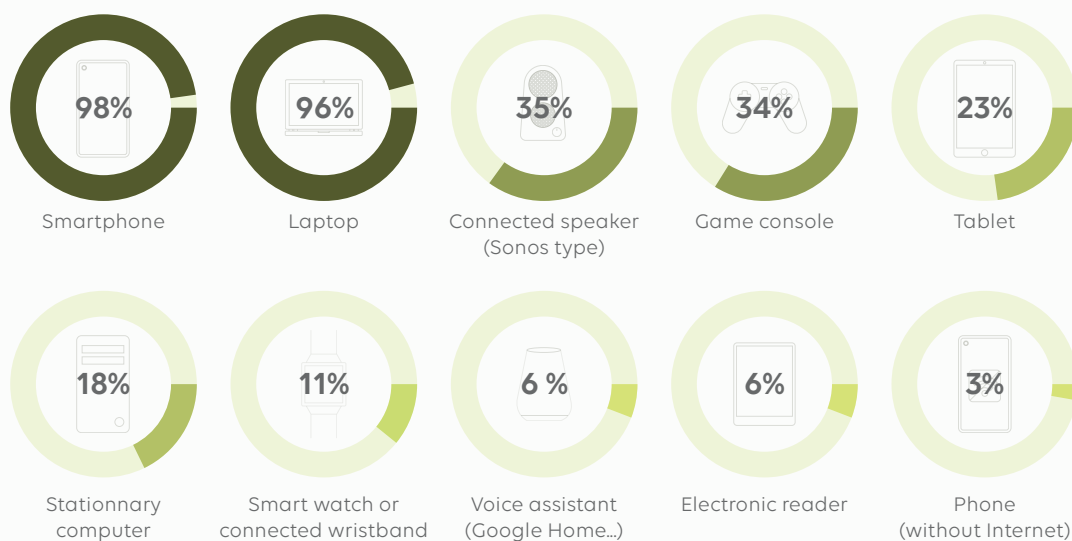
KEY POINTS

- 98% of respondents have a smartphone: it is the essential device with which all of Generation Z (people born between 1997 and 2016) grew up..
- In 2021, it is unthinkable to live without WiFi and for 36% of respondents, it is even more important than heating their home!
- The majority of students in 2021 use the Internet for at least 6 hours a day.
- However, only 37% of them are "very careful" about the protection of their personal data.

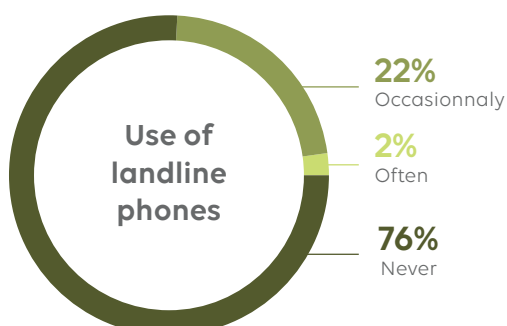
TYPICAL PROFILE OF A STUDENT IN 2021

The average age of respondents to our survey is 20 years, 46% male and 54% female with a homogeneous representation of academic level (from two to five years of higher education). Unsurprisingly, they are well equipped and ultra connected. Almost all the students have a smartphone (98%) and a laptop (96%) and they each own up to 5 electronic devices in total.

Distribution of electronic equipment owner by students



Landlines are no longer really part of the landscape. 76% of students never use them. Smartphones have completely replaced the telephone as we knew it in the mid-2000s. The young people interviewed had their first mobile phone at around the age of 12. The possession of a personal technological device is anchored deep within from a young age. In first position, the smartphone and all of its on-board applications (students tell us they have between 15 and 50 apps on average).

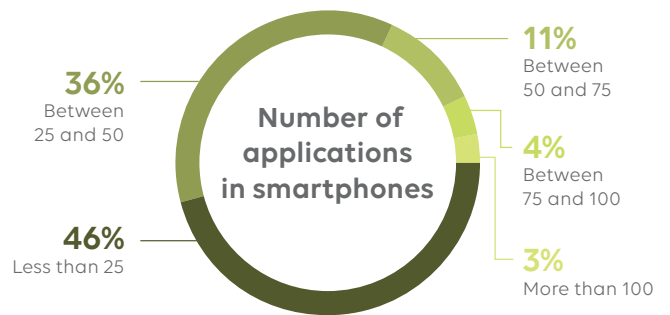


« Landlines? They're just for people trying to sell you things, for salespeople to call you up every day... so no thanks. »

Kevin, 21 years old

« I have about 40 apps on my iPhone. It's pretty simple – mobile phones are used for so many things that the number of apps just keeps going up and up. »

Paul, 23 years old



Students spend a lot of time on the Internet, or at least using the Internet. Why this difference? When listening to music streaming, are we « on the Internet »? Not really, but obviously we're using the Internet. **Over 70% of students use the Internet for more than 6 hours a day.**



Thus, we observe that the **young people of 2021 cannot live without the Internet** (more than 3 out of 4 young people could not imagine living an unconnected life). However, they do retain a certain sense of priorities when it comes to survival, believing that a well-stocked fridge is still more important than a high-speed WiFi connection!

Better to have at home...



Finally, we asked them about their relationship with the protection of personal data on the Internet. Where does our data go? How is it handled? Do we really have to read the small print and all the terms and conditions? Should we blindly accept all cookies?

2 out of 3 students are not at all, or only a little vigilant around the subject of data protection.

Only 37% of students say they are very vigilant.

The Internet, for a digital native, is an essential part of life, and the smartphone has really become an extension of their hands, something that they need for everything they do and almost all of the time, whatever the compromises are that need to be made, remaining connected is the priority.

02

THE INTERNET: STUDENTS' TOP LEISURE ACTIVITY



The Internet is deeply embedded in students' social lives and leisure activities: music, TV, communication, everything goes through the Internet. Has Google permanently replaced the dictionary? Have streaming subscriptions, led by Netflix, fundamentally changed our view of entertainment? Have Snapchat or Instagram filters become the norm? Let's try to understand how technology has become such an integral part of leisure in 2021.

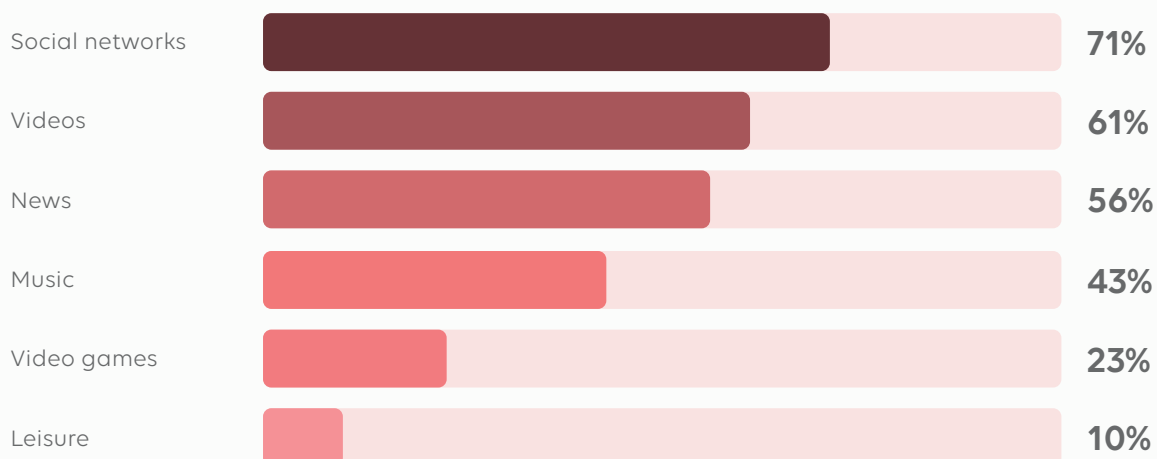
KEY POINTS

- In 2021, the telephone is no longer used for making telephone calls: only 5% of respondents contact their friends by calling.
- Communication takes place through social networks, which is what 71% of respondents admit to spending most of their time on the Internet doing
- On the entertainment side, streaming has become the norm even if for 30% downloading remains the number one way to listen to music.
- As for television, more than 40% of respondents never watch it either live or on demand.

THE INTERNET: STUDENTS' TOP LEISURE ACTIVITY IN 2020

Students spend the majority of their free time on social networks and instant messaging apps: the Internet is their preferred means of communication. **71% of respondents mainly use the Internet for social communication**, pushing the traditional use of the telephone into the background (only 5% claim to contact their friends by calling them). In 2021, the norm - no longer just for teenagers - is definitely to send each other iMessages, Snaps, private Instagram or Whatsapp messages with emojis and filters. **The exchange is dramatised.**

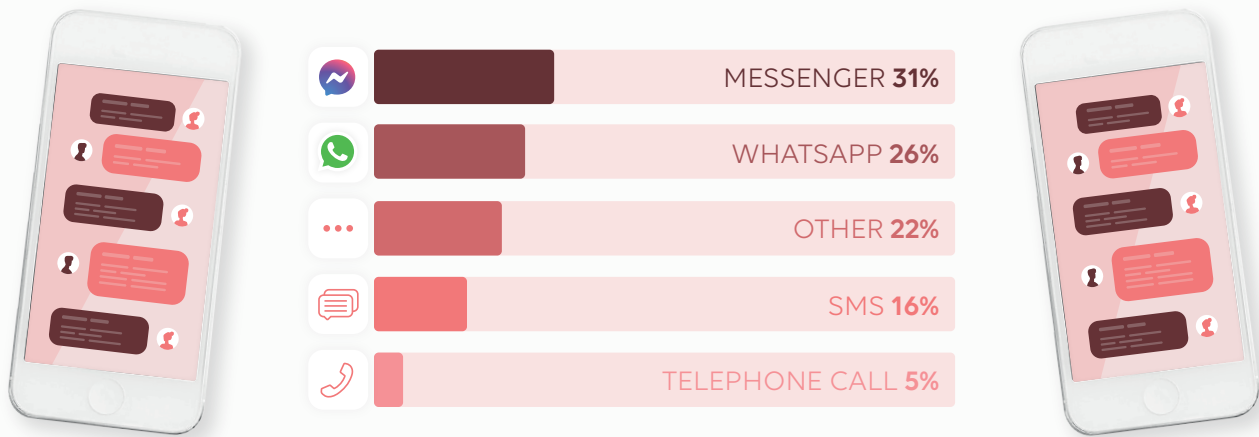
Among these different categories,
what is your main use for the Internet?



« I'm not surprised that social network messaging came top of the poll: I also mostly use my phone to talk to my girlfriends using Snapchat or Instagram. »

Sarah, 21 years old

How do you most often contact your friends?



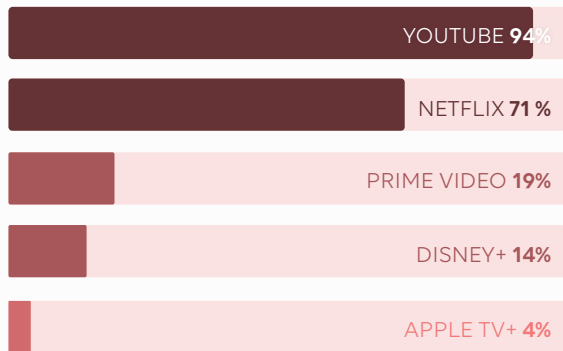
« I usually use Messenger. I find it more visually pleasing and more fluid than WhatsApp. Also, you don't need a phone number to start a conversation. »

Ivan, 22 years old

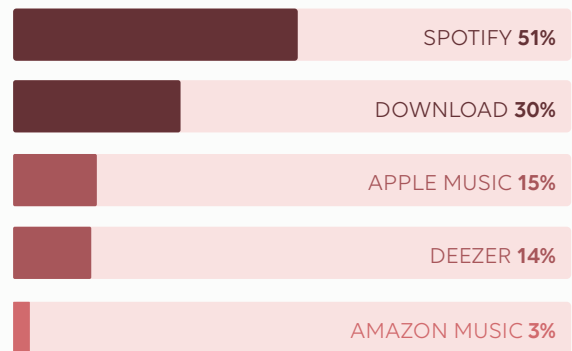
On the entertainment side, **61% of students go online to watch videos**. We also know that streaming has taken an increasingly important place in their daily lives, with YouTube and Netflix in the lead for video. YouTube has been considered by young people as a medium in its own right for a few years now, and **the rise of Netflix is very impressive: 71% of students use it**.

A figure that seems enormous for a paid subscription platform. But beyond the lockdown effect in 2020, which contributed to the global rise of streaming services on offer, we can assume that the platform's investment in the production of original content has also weighed heavily in the balance. Statistic.com estimates that by Q3 2020, the number of UK Netflix subscribers had increased to over 15 million, however, the actual number of users is probably much higher given that it is possible to create several accounts from a single subscription.

What streaming platforms do you most use?



How do you listen to music ?



Much like subscription video on demand, the use of paid audio streaming services is becoming more widespread too, with the number one audio streaming service also dominating the student market: **51% of students use Spotify**, then 15% Apple Music neck and neck with Deezer (14%). Another interesting fact: the «old-fashioned» method (**downloading**) **remains the way to listen to music for 30% of respondents**.



On my phone, I listen to downloaded music 15% of the time, on my PC it's only downloaded music (2000 songs that I listen to very often), but otherwise on my phone it's mostly Spotify. »

Lucas, 22 years old

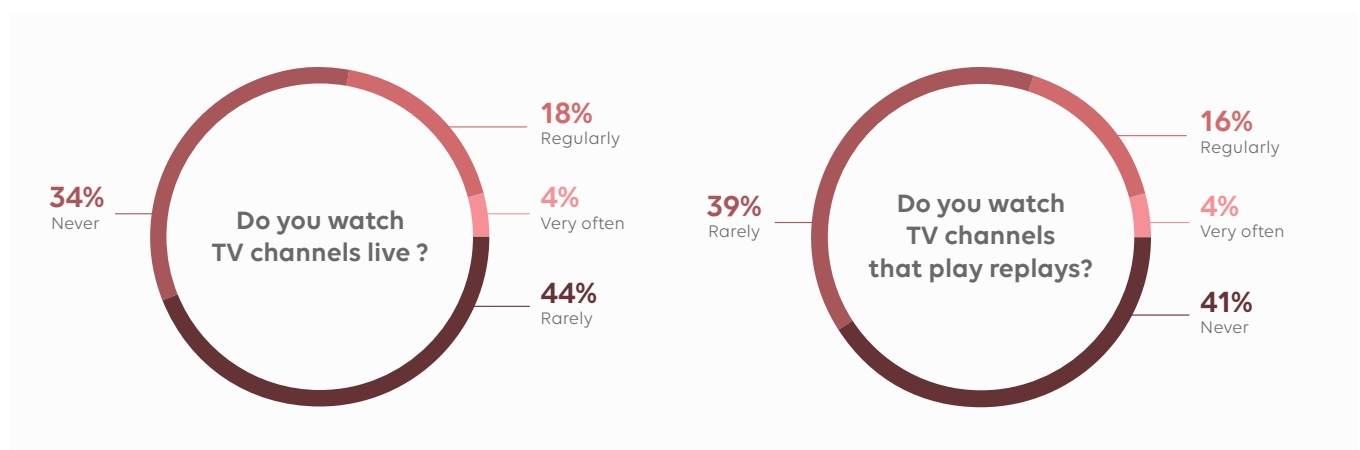
Another observation that emerged: while the consumption of traditional TV remains popular, digital natives hardly ever watch it any more. It is considered out-dated and programmes offered in a linear fashion no longer meet their expectations. They want to choose their content and the moment they wish to consume it.

« What conditions me into not watching TV is that I'm like "Why watch TV if I can watch whatever I like on the Internet?" Also knowing that what I can get on TV is generally not that appealing to me »

Bill, 23 years old



A total of 44% say they rarely watch TV and 34% never watch it. The results are clear and there is a similar amount of interest in channels showing replay content (only 16% watch these regularly).

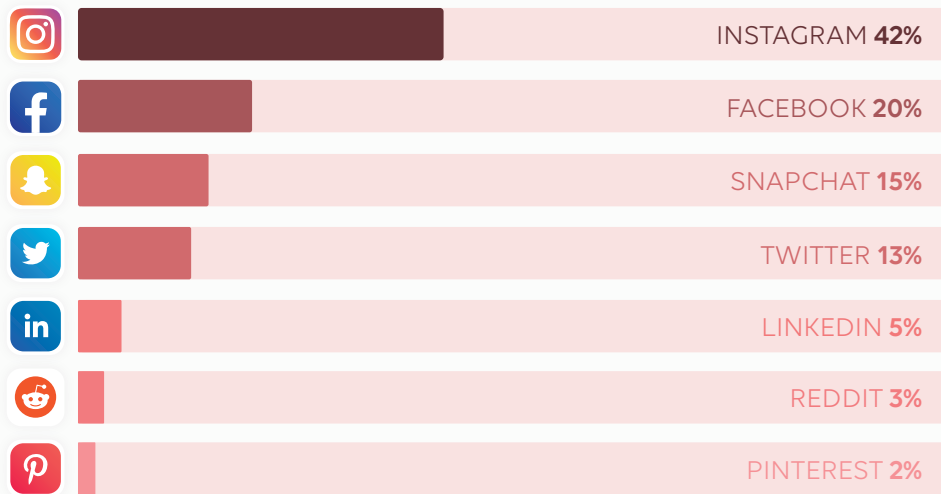


In terms of social networks, **the star is clearly Instagram with 42% of the votes.** We can imagine that features such as IGTV (the app's video sharing function), the many possibilities of Stories (adding your favourite music, interactive games, etc.) or the "Reels" or "Shop" tabs help sustain its appeal.

Facebook is in second position (20%), probably thanks to its instant messaging app « Messenger » which allows you to communicate on your smartphone without needing the phone number of the person you are communicating with.

Finally, while LinkedIn may be the world's leading professional social network with nearly 64% of the working population (source LinkedIn), we see that students do not necessarily associate the concept of social network with the professional world. Only 5% of them would use it if they had to choose just one.

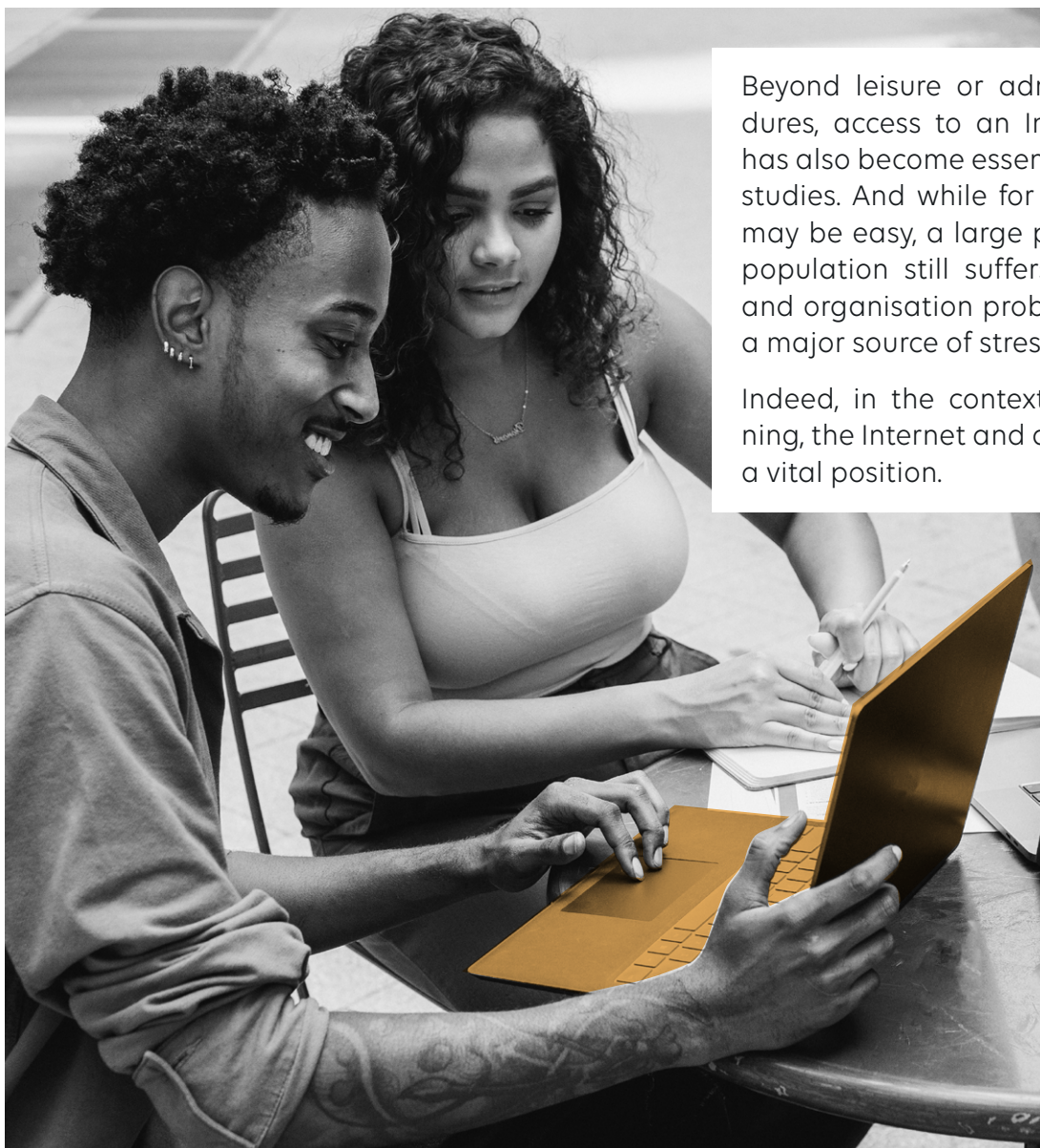
If you had to be kept on one social network, which would it be?



While the Internet is omnipresent in the lives of students, we see that each device is associated with a particular use or even a particular mode of consumption. The smartphone is mainly used for social communication, while computers are used for entertainment: video and audio streaming come out top, but these are not the only uses. Indeed, 56.3% of students also say they use the Internet for research, a figure that can be attributed to the rise in remote learning.

03

THE INTERNET: AN INTEGRAL PART OF ACADEMIC LIFE



Beyond leisure or administrative procedures, access to an Internet connection has also become essential for completing studies. And while for some, teleworking may be easy, a large part of the student population still suffers from connection and organisation problems, representing a major source of stress and uncertainty.

Indeed, in the context of distance learning, the Internet and digital tools occupy a vital position.

KEY POINTS

- The digital age has its limits: 67% of students say they do not have access to replays of their online classes.
- A tool that could be useful for the majority of students who judge the quality of distance learning to be worse than face-to-face (5/10) due, in particular, to technical concerns.
- Finally, 65% of them believe they have a better connection in their residence than in their place of study.
- 10% of students even say they have no WiFi access at their school or university.

THE INTERNET, AN INTEGRAL PART OF ACADEMIC LIFE

Students have found in recent months, the Internet is no longer only used for leisure activities but has become a working tool in its own right. Distance learning and even remote exams have become widespread, making access to a high-performance Internet connection essential for successful studies.

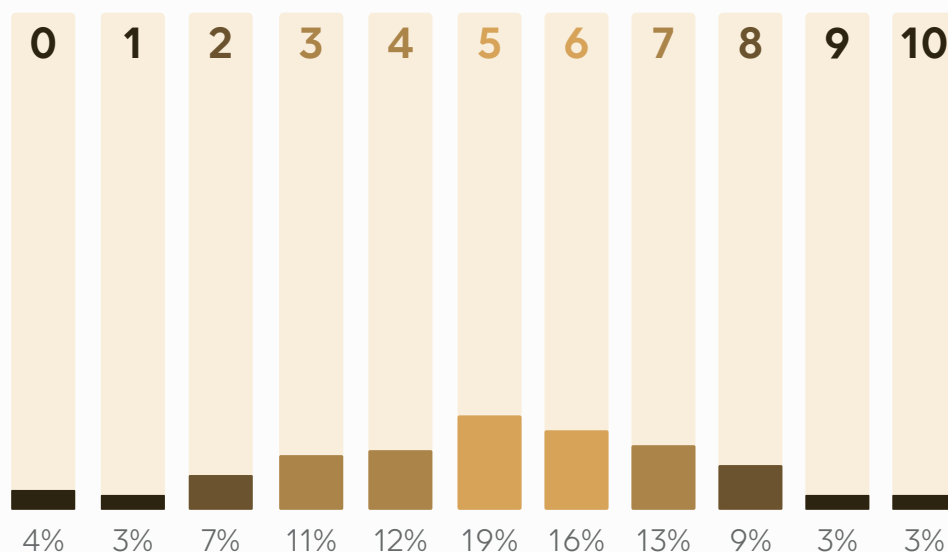
However, our survey shows us that despite the widespread shift to distance learning, we are still far from being 100% digital.



« There are technical issues and the teaching staff aren't always comfortable with the tools. Even so, I would rate it higher than a 5/10 as we do a lot of group work that helps to make the classes slightly more fun. »

Paul, 23 years old

How do you rate the quality of the online courses compared to the face-to-face format? (10 being very satisfactory)



Unlike a professional who might participate in a webinar, students are not necessarily able to view a catch-up of the classes taken remotely: **only one in three students has access to their classes with a replay option.** In this regard, state education is ahead of private. A good number of universities have set up access to remote classes from a secure dedicated platform offering both live classes and access to «deferred» recorded classes to ensure «high availability» (despite potential technical problems) of this critical service for remote learning.

« As far as I'm concerned, I know that in my school and other schools that aren't faculties, classes are never available on catch-up. On the other hand, for all my friends who are at uni, they have a replay option. »

Jonathan, 21 years old

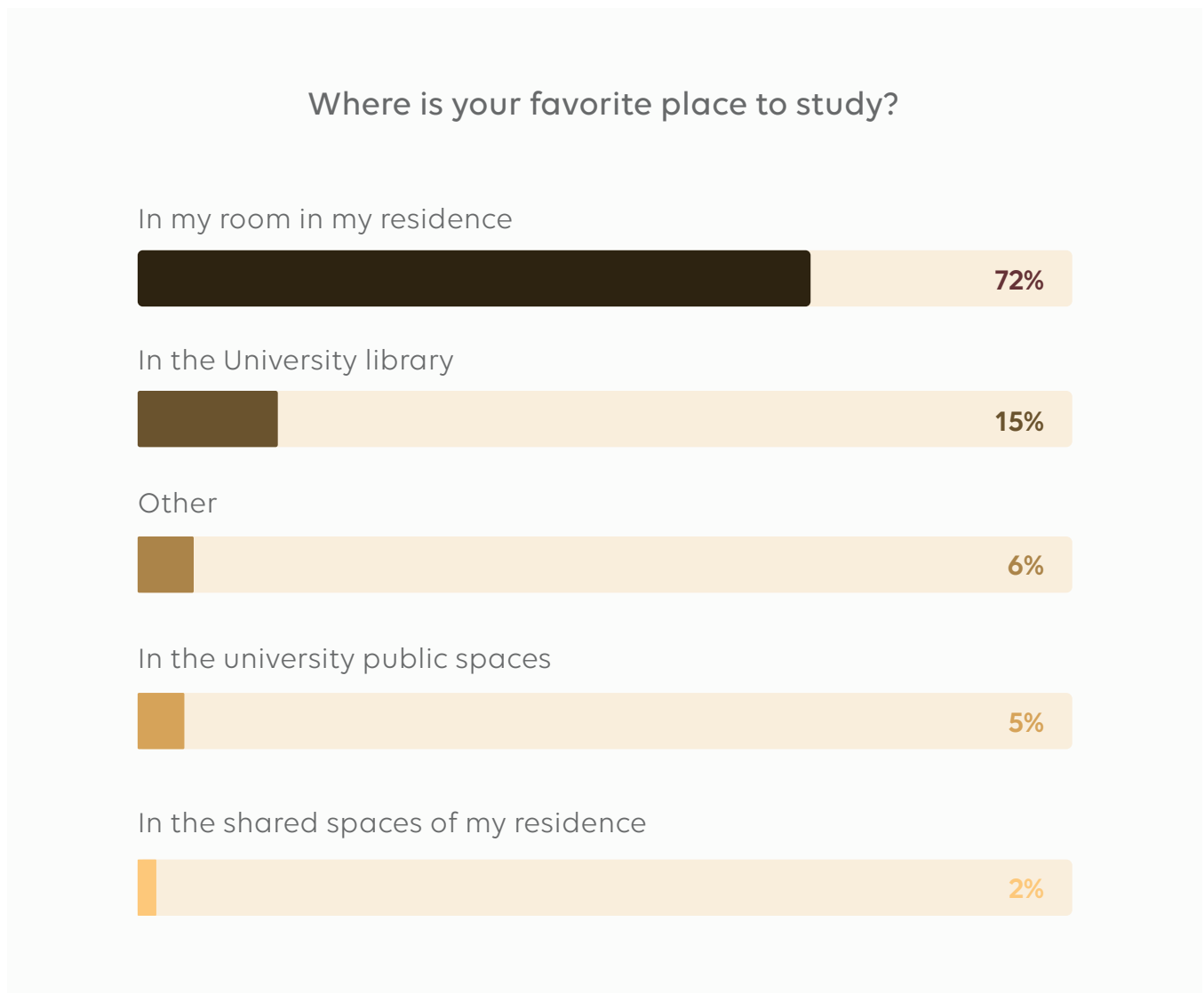
In terms of remote group meetings, the use of Zoom or Teams type platforms is widespread, with 26% using them regularly and 35% always. Students are clearly familiar with the tools and software that make working online easier.



« When I'm in class and we're put in groups, we use Zoom, but if for example I have a group work assignment to hand in the next day, I'll use WhatsApp to do a video call that evening. »

Henry, 24 years old

As for studying time outside of class, and despite the two lockdowns in 2020, a students favourite place to study is still their room!



This confirms the importance of having a highly available private WiFi connection within a student residence.

Indeed, the Internet in 2021 is an essential virtual social tool but also an essential tool for academic success. Two aspects that the arrival of Covid-19 has only amplified.

04

THE INTERNET AND COVID-19, THE ACCELERATION OF DIGITAL



The lockdowns of spring and last autumn and living with Covid-19 have revealed the essential role of WiFi, some going so far as to put it on the same footing as a physiological need. Exaggeration or reality?

KEY POINTS

- Unsurprisingly, there was a marked difference between the first and the second lockdowns of 2020: 80% of students left their residences in the spring, fewer than 20% in the autumn.
- 63% of students claim that virtual sociability was already ingrained in their daily lives before the onset of Covid-19.
- 88% of students say the Internet has helped improve their daily lives during the 2020 lockdowns.
- If the Internet was essential during the crisis, lockdown measures have in reality simply accelerated an already very real phenomenon: Internet dependency.

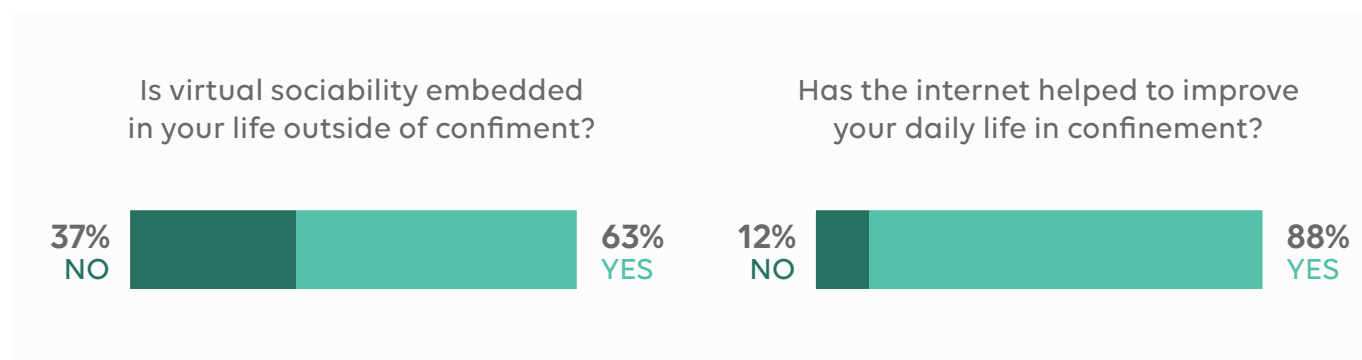
THE INTERNET AND COVID-19, THE ACCELERATION OF DIGITAL

When young people were in lockdown far from their loved ones in March 2020, they were able to keep in touch with their friends and family thanks to their WiFi connection. Online meetings with friends or family were quite common, as 32% of students held them occasionally and 30% regularly. This is to be expected, when we know that social communication was already mainly virtual for the majority of them before the health crisis.

We also noticed that students were much more likely to stay put in their student residence during the second lockdown. In the spring of 2020, only 36% stayed, **compared to 83% who chose not to leave their residence last autumn.**

This phenomenon is certainly due to a lockdown that turned out to be less severe, when for example going to work or simply going for a walk in the open air became permitted.

Then comes the inevitable finding that during the 2020 lockdowns, a good internet connection proved extremely important in overcoming the sense of isolation brought about by a solitary life, cut off from the real world as we had known it until then. Indeed, **88% of students say that the Internet improved their daily life during lockdown!**



It's true! I really think we're moving closer to needing the term "essential" to talk about the Internet.»

Henry, 24 years old

CONCLUSION

This survey has allowed us to understand how essential the Internet is for the student of 2021. Not only because it helps to alleviate the loss of a “physical” social life destroyed by the health crisis, but simply because in their lifestyles everything depends on the digital world: communication, leisure and even studies require an Internet connection.

Yet does this mean that the desires of these future young professionals are only geared towards the virtual?

You might think so. Indeed, for 62% of students, the overriding expectation in terms of connectivity is unsurprisingly the need for greater speed and a smoother connection. This confirms the constant need for immediacy among young people, but does it mean that they aspire to a 100% digital future?

Not necessarily. Indeed, **58% of respondents do not plan to continue teleworking once the health situation is under control.** It seems face-to-face work and the human relations that go with it may well still have a bright future ahead.

It is as if their future needs as active workers were an extension of those of student life: virtual sociability in private but **a need to anchor one's professional life in reality.**

Finally, we note that students care as much or even more about our environment than the rest of the population. **The fact that streaming and Data Centres are energy intensive could change the consumption habits of 61% of these young people,** who nevertheless state in the first part of our survey that they cannot envisage life without WiFi.



If Data Centres become increasingly removed from a socially responsible, ecological approach, that could well make me change my habits. »

Mary, 21 years old

For 91.9% of our respondents, it is players from the digital world who have a role to play in our ecological future.

While the students of 2021 live their lives connected to the Internet everywhere, using it for (almost) everything, all the time, this is also the generation that has grown up with an ecological awareness. The difficulty lies in knowing whether continued Internet use can go hand in hand with an overall reduction in our environmental impact.

