

MEASURING
DIGITAL MEDIA
TRENDS
IN FLANDERS



AUG-OCT 2015 SUMMARY



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PREFACE

digiMeter is a research initiative of iMinds, a digital research center and business incubator with the ambition to stimulate demand-driven and user-centered innovation in the Flemish ICT sector.

This ambition makes it indispensable for the more than 900 academic researchers who are directly connected to iMinds to keep up to date with the trends, habits and practices of the 'demand -side' or the end-users.

The primary research goal of digiMeter is as follows:

With the digiMeter project, iMinds Living Labs intends to gather and share data and information regarding Flemish media and ICT users on a systematic and annual basis, adopting a representative methodology. This provides iMinds researchers with reliable data and information regarding the adoption and diffusion of (new) media and ICT, as well as the latest trends, habits and practices. This report serves as the public summary of this data¹. Because of its annual frequency, digiMeter also serves as a monitor to detect and keep track of emerging trends and practices.

The second research goal is related to the detailed profiles the digiMeter project delivers:

By carrying out the digiMeter survey on a yearly basis and including recurring respondents as well as a substantial amount of new people with each wave, the digiMeter project allows us to build and refresh a database containing detailed user profiles of end users who agree to be involved in further innovation and user research (i.e. Living Lab research facilitated by iMinds Living Labs). This user database is available for SMEs, organizations and companies, for research in collaboration with iMinds Living Labs. Management of the digiMeter user panel is handled by the panel management staff of iMinds Living Labs.²

After each digiMeter wave, the survey and the data gathering methods are subjected to critical analysis and academic reflection in order to optimize and update the following wave.

To avoid skewed figures caused by Internet access and computer ownership, a substantial part of respondent recruitment has been carried out offline by trained interviewers.

¹ For more information regarding the in-depth analysis of these data, please contact Prof. dr. Lieven De Marez (lieven.demarez@ugent.be) or Bart Vanhaelewyn (bart.vanhaelewyn@ugent.be).

² Panel management can be contacted through panel@iminds.be

Over the course of 7 weeks in August and September, we addressed respondents from all over Flanders through recruitment events in large and small cities. Recruitment was accomplished by visiting markets, libraries, public parks, shopping streets, local markets, music festivals, events for people over 55, senior citizens' associations, nursing homes and local pubs.

We organised recruitment events in Ghent, Antwerp, Lokeren, Genk, Tienen, Kortrijk, Hasselt, Ostend, Mechelen, Leuven, Kortenaak, Stekene, Torhout, Kortemark and Diepenbeek.

The respondents could fill out the survey on tablets during recruitment events or take home a paper version and send it to us free of charge. Explanatory dictionaries were available to clarify unknown terms (e.g. NAS, Ultra HD TV, CI+, Feedly, ...). Respondents could also request assistance at any moment from one of our qualified contributors.

To ensure accuracy of the answers, we paid special attention to the oldest age groups (65+) by assisting them in completing a paper version of the survey on an individual basis or in small groups (max. 10 people).

Last but not least, we want to thank all the respondents who filled out the digiMeter survey. Without them openly sharing their media habits and practices, this report would not have been possible.

DIGIMETER METHODOLOGY

Each year, iMinds' digiMeter monitors a representative set of at least 1.500 Flemish inhabitants (aged 15 years or older) on their usage and possession of (new) media and ICT.

- This is the eighth annual edition of the digiMeter report to monitor these evolutions.
- To allow for representative results for Flanders, a minimum quota sample of N=1500 is defined by province, gender, age (15+) and education level, based on the most recent federal statistics¹. The total dataset is weighted based on the last three variables.
- In the period August to September 2015, 2.181 individuals have completed the survey. 1.532 respondents (or 70,2% of the total sample) were collected offline by means of (tablet) computer-assisted personal interviews (CAPI) or paper and pencil interviews (PAPI). 649 respondents (or 29,8%) filled out the survey online (computer-assisted web interview or CAWI).
- The survey consists of eight thematic chapters: TV, computer, tablet, telephony, social media, gaming, traditional media (radio, music and news) and general media use. Depending on their answers, respondents are directed to more questions on applications and other information regarding these technologies and media types. This way, digiMeter provides quantitative insights into the adoption and use diffusion of (new) media and ICT. The survey is concluded by a list of socio-demographic questions.
- Just like with the previous waves, this report concludes with a segmentation of the Flemish population. A K-means cluster analysis was used, based on 8 variables measuring the variety of use and 8 variables measuring the frequency of use (TV, computer, tablet, smartphone, social network, games, music and news) to construct 5 segments.
- digiMeter provides a snapshot view of the adoption and use of media and ICT. It is based on the self-reporting of media consumers. As such, the results should be interpreted as the perception respondents have of their own media consumption. The methodology does not allow for assumptions on the effective media reach.

¹ Statistics Belgium, FPS Economy - Directorate-general Statistics (Dutch: FOD Economie - Algemene Directie Statistiek)

- The survey investigates the adoption of devices within households: who has access to a device or service in their household? It does not measure personal ownership of a device (except for mobile phones), nor does it make assumptions on a household level (how many households own a device or subscription to a service). The latter would imply a completely different data gathering method and quota sampling.
- The evolution with regard to the previous wave is expressed by means of percentage points (the absolute difference between two percentages). For instance: when adoption increases from 20% to 30%, there is an increase of 10 percentage points. Expressed as a (relative) percentage, the same growth represents an increase of 50% (because to get from 20% to 30%, an increase of half the value of the starting point is needed).
- All respondents had an equal chance of winning a voucher, ranging from €10 to €500. The total amount of all vouchers combined was €2.000.

GENERAL ADOPTION

MEDIA & ICT ADOPTION IN FLANDERS - 2009 TO 2015

The adoption of computers (both fixed computers (desktops) and portable computers (laptops, netbooks, hybrid laptop/tablets)) remained stable at around nine out of ten Flemish people (90,1%). The gap between desktop and portable computers continues to grow, however. Ownership of desktops has dropped from 54,3% to 51,1%, whereas the adoption of laptops has remained stable. The number of Flemish people with access to the internet in their homes is more than nine out of ten (91,2%), the same as in previous years.

One third of the Flemish population (33,5%) say they own a game console at home. The fixed game console, which is connected to the TV set, is still the most popular device (30,5%). Portable console ownership is at around half that figure, with 15,8% of the Flemish population now owning a handheld console at home. These adoption figures have remained fairly stable in recent years, and have even increased slightly. In spite of the growing number of other devices on which you can play online games (e.g., tablets or smartphones), game consoles do not seem negatively affected by this in the short term.

The adoption of tablets has continued to increase, with almost six out of ten Flemish people (58,3%) stating that they have a tablet at home. This is an increase of 2,5 percentage points compared with 2014. In 2015, the growth pattern of the three previous years, where tablet ownership increased by 13 to 15 percentage points each year, has clearly come to an end. In other words, growth has slowed considerably. With almost 6 out of 10 Flemish people having access to a tablet at home, the tablet seems to have reached a saturation phase in 2015.

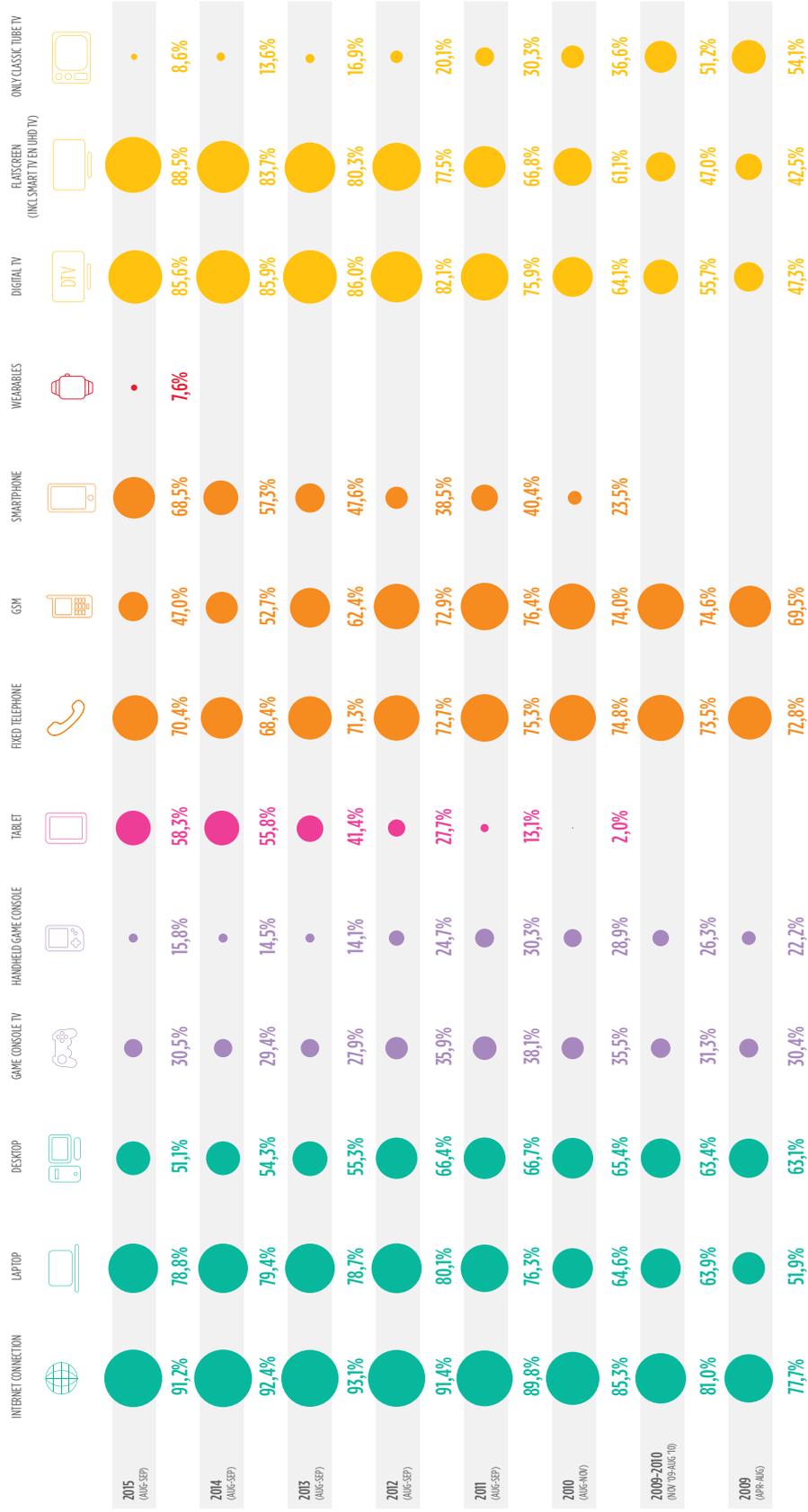
Telephones continue to be a widespread means of communication. Almost every Flemish person (99,2%) has a landline and/or a mobile phone at their disposal. In this mobile age, the use of landlines is stable at around 70%, whereas 97,1% of people have a mobile phone (GSM or smartphone) (+0,9). In 2014, for the first time, the level of adoption of smartphones was greater than the number of Flemish people with a GSM. In 2015, this gap has become even bigger. The adoption of ordinary mobile phones has declined by 5,7 percentage points (47,0%) whereas the ownership of smartphones continues to increase sharply (an increase of 11,2 percentage points to 68,5%).

In 2015, 7,6% of the Flemish population stated that they owned a “wearable”. Wearables are portable, digital devices worn on the body or in clothes to measure personal information (e.g., your heart rate), or for notifications (e.g., breaking news, an incoming call or a notification that an event on your calendar is starting). These are not smartphones or tablets, but smart watches (watches with extended applications, such as managing incoming communications and the use of navigation tools, e.g., Apple Watch), smart sports watches (smart watches that were specifically designed for the monitoring of sports performance, such as Polar), smart wristbands (e.g., FitBit), smart eyewear (e.g., Google Glass), etc. The most frequently used wearables are smart sports watches (3,5%), smart wristbands (2,4%) and smart watches (2,2%).

The adoption of television sets has remained stable at 97,1% (-0,2). Still, there is a noticeable shift in the type of TV sets, with people who only had a classic tube TV set at home (8,6%, drop of 5 percentage points) switching to flat screen TVs (88,5%, increase of 4,8 percentage points).

Generally speaking, we can conclude that, like last year, most technologies seem to have reached their saturation point. More than nine out of ten respondents have an internet connection and a computer (desktop and/or laptop) at home. One in three have a game console. Almost everyone in Flanders has a mobile phone and/or a landline and about 97% have a TV screen at home (with 86% with a digital TV subscription). The tablet is gradually earning a place on this list as well, as it seems to be stagnating somewhat at the moment, reaching 6 out of 10 Flemish people. The smartphone is the only exception to this rule, with a spectacular growth of 11,2 percentage points compared with last year. This was the first year that wearables were included in the digiMeter survey, and we can see that 7,6% of Flemish people already own some kind of wearable.

PROPORTION OF FLEMISH PEOPLE WITH ACCESS TO THE FOLLOWING TECHNOLOGY IN THEIR HOUSEHOLD:

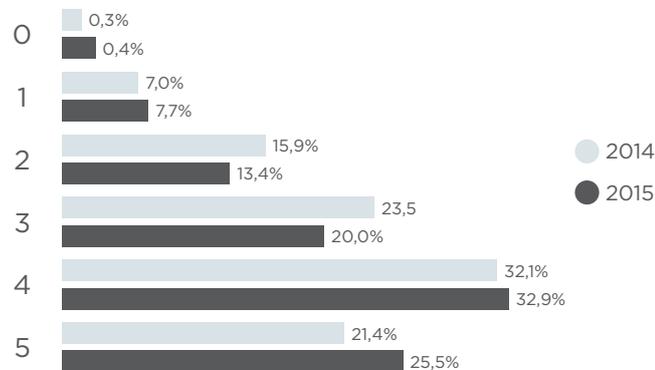


MULTISCREEN

Flanders multiscreen. Having multiple (different) screens in the household is a reality for more and more people in Flanders. More than 3 in 4 members of the Flemish population (78,4%, an increase of 1,4 percentage points in comparison with last year) have at least three screens at home today. Almost 6 in 10 Flemish inhabitants (58,4%) have at least four in the house. That's 4,9 percentage points more than last year. This growth can be almost entirely attributed to an increase in the segment that has access to 5 screens: a quarter of the Flemish population say they now have access to a television screen, a desktop, a laptop, a tablet and a smartphone. This is an increase of 4,1 percentage points in comparison with last year.

- 20,0% have a **triple-screen household** (-3,5): they have access to 3 different types of screens at home.
 - Most common triple-screen combination: TV, laptop and smartphone (8,4%)
 - Second most common triple-screen combination: TV, laptop and tablet (4,1%)
 - Third most common triple-screen combination: TV, desktop and laptop (3,3%)
 - Other triple-screen combinations: 4,2%
- 32,9% have a **quadruple-screen household** (+0,8): they have four screens at home.
 - Most common quadruple-screen combination TV, laptop, tablet and smartphone (18,9%)
 - Second most common quadruple-screen combination: TV, desktop, laptop en smartphone (7,3%)
 - Third most common quadruple-screen combination: TV, desktop, tablet and smartphone (3,3%)
 - Other quadruple-screen combinations: 3,4%
- 25,5% have a **quintuple-screen household** (+4,1): they have access to all five types of screens at home (TV, desktop, laptop, smartphone and tablet).

TO HOW MANY SCREENS DO YOU HAVE ACCESS IN YOUR HOUSEHOLD? (TELEVISION, DESKTOP, LAPTOP, SMARTPHONE OR TABLET)



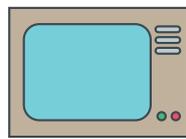
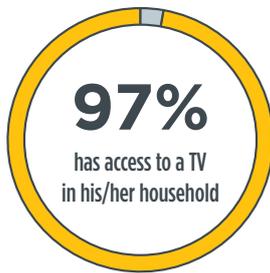
Multiscreen households: the number of screens (TV, desktop, laptop, smartphone or tablet) to which the respondents have access in their household (N=2.181)

TELEVISION

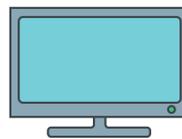


TV: Symbiosis between traditional and new forms of watching TV

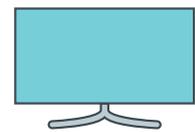
The adoption of TV screens remains stable. However, we do see an evolution in types of TV screens within the Flemish households. The classic tube TV is increasingly displaced by flat screens. Today **almost three out of ten** Flemish people **have a Smart TV at home**.



9%
only classic tube TV

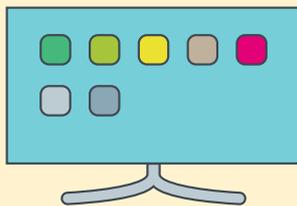


76%
flat screen



29%
Smart TV

Use of Smart TV



25%
of Smart TV owners claims to have **never used an app** on this device.

The most popular apps on Smart TVs are **YouTube** and **Netflix**.



19%
weekly



18%
weekly

Daily watching TV occurs on different devices



TV



LAPTOP



TABLET



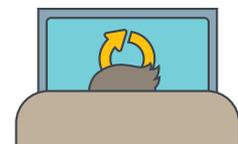
SMARTPHONE

Live versus timeshifted



60%

claims to watch live/linear programming on a daily basis



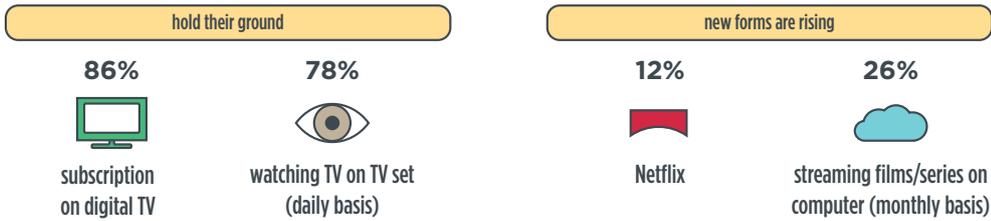
30%

claims to watch timeshifted content on a daily basis

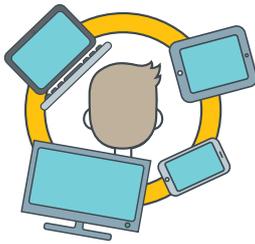
Complementarity of traditional TV and new forms of TV consumption



Despite the rise of new forms of TV consumption such as Netflix, the traditional TV broadcasters seem to hold their ground.



Media multi-tasking



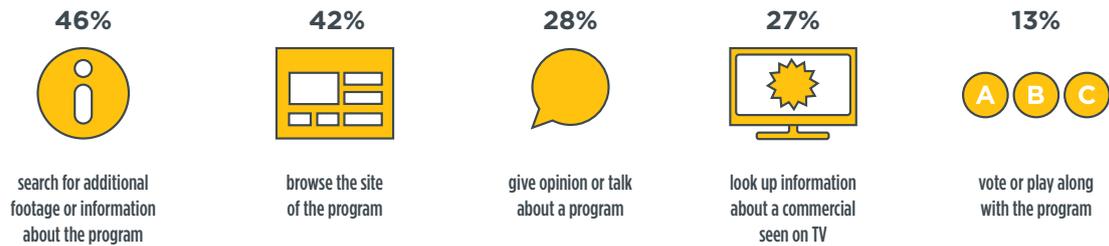
70%

uses the internet on one screen while watching audiovisual content on another screen.

Distraction versus interaction



Types of interaction



TELEVISION

DEVICES

- 97,1% own a TV set in their household.
- **The classic tube TV as an endangered screen type.** A classic tube TV is becoming increasingly rare in Flemish households. For 8,6% of the Flemish population, the classic tube TV is the only television screen in the house; last year this was 13,6%. Almost half of this group is at least 65 years old (47,3%).
- Just like last year, we can see that the decrease in the number of classic tube TV screens (-5,0 percentage points) was compensated for by an increase in the number of flat screen TVs (+4,8 percentage points). 88,5% now have a flat screen TV at home. In most cases, this is a normal flat screen TV (75,5%), whilst for almost 3 in 10 Flemish respondents this is a smart TV (29,2%).
- **Smart TV: in the first instance a flat screen and only in the second a connected (smart) device.** Ownership of a Smart TV in Flanders is increasing (+3,1 percentage points in comparison with last year). However, this does not automatically represent a drastic change in the way the TV screen is used. A quarter of those who have a smart TV at home, have never used an app on it and simply use it like an ordinary television screen. Smart TVs are certainly not always used 'smartly'. If they are, the YouTube (18,7%) and Netflix (17,5%) video apps are far and away the most popular apps based on weekly use. In particular the younger segments (15-29 year olds) who own a Smart TV appear to make regular use of apps on the Smart TV.
- **Rise of streaming devices.** Apart from using a Smart TV, there are other ways to connect a television screen to the internet, or to wirelessly stream files from another device (computer, smartphone or tablet) to the television screen. Around 7,0% of Flemish people own a Google Chromecast and 5,7% have an Apple TV box at home.

DIGITAL TELEVISION AND OTHER SUBSCRIPTIONS

- The adoption of digital TV subscriptions remains stable at 85,6%.
- Electronic Program Guide (EPG) (57,2%), Ad skipping (48,7%) and Recording a program or movie (37,9%) remain the most popular digital TV functionalities on a daily basis.

- **Modus vivendi with adverts on TV?** The possibility to fast forward through ads remains a popular feature of digital television. However, for the second year in a row, willingness to pay for this function has dropped significantly. Almost six out of ten respondents would prefer to lose the ability to fast forward through adverts than to pay extra for it (58,1%). That's 7,6 percentage points higher than last year. With only 1 in 5 Flemish people (22%) willing to pay for ad skipping (in 2014 this was 28% and in 2013 even 33%), the Flemish seem increasingly to be reaching a modus vivendi in the variety of 'viewing' alternatives. Ads on television are a necessary evil; when people want to enjoy a film or series without ad breaks, they will choose other (on-demand) platforms.
- **Netflix gains streaming customers.** A year after the launch, 11,5% of the Flemish population report that they have access to a Netflix account. N.B.: access is not equal to unique subscriptions here. Our previous Netflix report¹, among others, revealed that one account can quickly be shared between 4 to 5 people. Not only within a family but often also outside the family. If we take this into account, we estimate that the number of unique subscriptions to Netflix in Flanders is somewhere between 120.000 and 155.000.

WATCHING TV CONTENT

- 3,1% of the Flemish population never watches TV content on any device.
- 44,5% of the Flemish population reports to watch 1 to 3 hours a day of TV on a television set; one in five (20,1%) claims to watch at least 3 hours a day. 27,8% watch TV content at least once a week on a laptop, 14,3% on a tablet, and 15,8% on a smartphone.
- **Mobile screens are increasingly used to view TV content and the smartphone has become more important than the tablet for this.** This is true particularly among young people. There is a clear link between age and watching TV content on other screens. Almost 70% of people under 30 watch TV content on a laptop every week. This is much higher than the 27,8% for the total population. Therefore, the profile of people who watch TV content on a laptop is relatively young, with 52,1% younger than 30. We also note that there is a young profile (51,8% younger than 30) for the weekly use of a smartphone for watching TV. With regard to 15 to 19 year olds, almost half (49,1%) say that they watch TV content via their smartphone every week, whilst for the category aged 20-29 this is 35,0%. This is again significantly higher than the 15,8% for the total population. For tablets, we can see that this is a slightly older profile. Two in three (66,8%) of those who watch TV content via a tablet every week are between 20 and 49 years old.

¹ You can find more information on the digiMeter Netflix study at http://bit.ly/dM_Netflix

- Live (linear) programming upholds its importance, while mobile screens seem to serve as a supplementary alternative rather than a substitute.** Watching television is becoming more and more of a multiscreen activity, while ‘the large television screen in the living room’ remains a standard for the average person in Flanders. Due to the application of a self-administered questionnaire, digiMeter does not allow conclusions to be drawn regarding the portion of time spent on each of these devices, nor the time spent watching live/linear programming versus timeshifted viewing. However, when we asked our respondents to what extent live/linear programming and timeshifted viewing are represented in their viewing behaviour (regardless of the actual time spent and the device used), we can conclude that live television upholds its importance in the viewing habits of the Flemish population, with 60% claiming to watch live content every day. Timeshifted viewing remains stable at about 30%. Alternative forms of watching TV content are still less common on a daily basis.
- The way TV content is consumed is highly dependent on the age of the viewer. Watching live/linear TV remains popular within all age groups. Overall, 74,7% indicated that they watch (at least once) live/linear TV on a weekly basis. However, it is striking to see that timeshifting equals or even tops live viewing among the two youngest age groups. Among the 15-19 year olds 65,5% and 64,9% respectively indicated that they watch live and timeshifted at least once per week. Among the 20-29 year olds, this makes up for 58,8% for live viewing and 61,0% for timeshifted viewing. Among the 65+ segment, linear television is by far the most common way to watch TV on a weekly basis (87,9%). Less than half of those aged 65 or older report watching in time shifted mode (43,3%), and other types of viewing are rarely reported on a weekly basis by the oldest age group (< 7%). Not surprisingly, the youngest profiles (15-19 and 20-29 year olds) are the most familiar with watching TV content via downloads (40,9% and 51,6%, respectively) and via streaming websites (50,2% and 58,6%).

USING THE INTERNET WHILE WATCHING TV CONTENT

- Multiscreen = multitasking in front the main screen.** The usage of the internet while watching TV (‘media multitasking’) has become a common practice. 69,9% (+0,1) say that they have engaged in an online activity on another screen while watching TV at least once last month.
- Last year we saw a shift towards more program-related activities. This year, we have seen a stabilisation, with 64,4% (+3,4) performing an activity that is separate from the TV program and 56,4% (-0,7) who had performed an online activity that was linked to the TV program they were watching at the time last month. So in many cases, multi-device use remains a ‘distraction’ but more than half the Flemish population also engages in ‘interaction’ with TV content. Within these ‘interaction’ activities, we see little change in comparison with last year (see further on).
- This year we have not noticed any major changes in the activities the Flemish perform online whilst watching TV. Last year we saw that visiting the program’s website had risen by 23,3 percentage points, whilst this now seems to have stabilised at 41,5% (+1,5) of Flemish inhabitants regularly visiting the website of a program they are

watching on the large TV screen using a mobile device. Searching for additional image material also rose significantly by 20,4 percentage points last year, whilst the increase this year was “only” 2,6 percentage points. Like last year, voting/playing along in a TV program (e.g. via a second screen app) is a less common activity with 1 in 8 Flemish inhabitants having done this last month. Almost 3 in 10 members of the Flemish population say that they have shared an opinion about a program online last month (27,8%). It is noteworthy that looking up information about a TV ad has remained stable at almost 30% (27,2%).

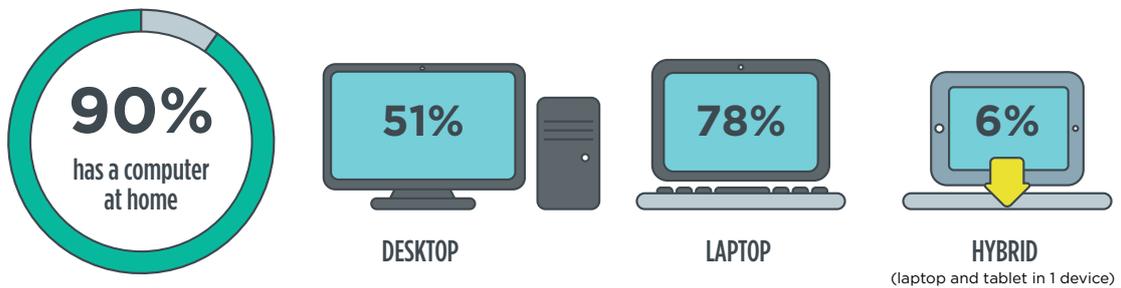
- **Smartphones in particular are becoming more important in a multiscreen TV context.** In general, we can see that the computer (laptop or desktop) is still the most commonly used device to engage in an online activity whilst watching a TV program, although this year we have noticed that the smartphone is gradually reaching the same level (which is of course closely linked to the increasing adoption level for smartphones, whilst ownership of computers is stabilising). With regard to sharing your opinion about a program, the difference has already almost disappeared, whilst with regard to voting/playing along with a program we can see that a few more Flemish people now use their smartphone for this rather than their computer. In line with the generally falling use of the tablet (see chapter Tablet), we also notice for media multitasking that the tablet is becoming less important and the smartphone is increasingly taking over this role. Within the segment of smart TV adopters, it is also worth noting that 1 in 5 people also use their smartphone as a remote control for this smart TV.
- Although we can still see a correlation between age and media multitasking (the younger the profile, the greater the proportion that was engaged in media multitasking last month), this is no longer unknown territory even for the older profiles. More than 4 in 10 (42,6%) of those aged 65+ said that they performed an online activity whilst watching TV last month. Last year this was 36,5%.
- Almost three in ten Flemish people shared their opinion on the TV program they were watching at the time last month (+2,9). Facebook remains by far the most commonly used channel here (69,6%), whilst use of a second screen app specifically for the program remains fairly limited (5,0%).

COMPUTER

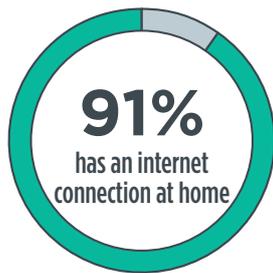
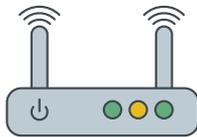


COMPUTER: Music and video streams gaining popularity

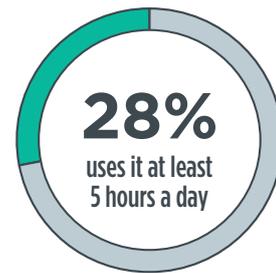
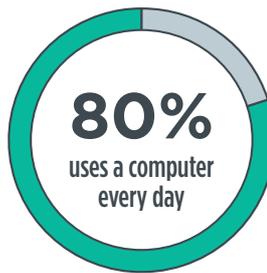
Ownership of computers and internet connections within the households of Flemish people remains stable. The amount of a desktop computer is decreasing, while laptop possession is holding its ground.



How often do you use a computer, at home or elsewhere?

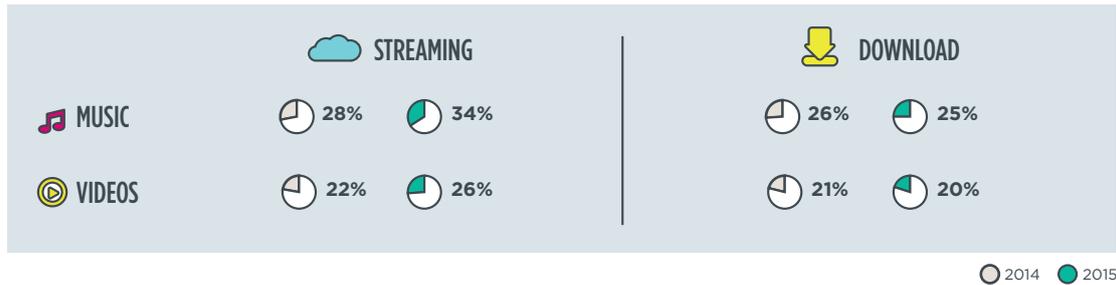


8 out of 10 of the Flemish population use a computer on a daily basis. Almost 3 out of 10 claim to even use a computer at least 5 hours a day.



Streaming vs. download

Streaming of content gains popularity, while downloading remains stable.



While most Flemish people seem to mainly stream on a legal basis, downloading is still largely done on an illegal basis. Movies and series are more likely to be retrieved (downloaded or streamed) on an illegal basis than music.

The rising popularity of (legal) streaming has not yet established a drop in downloading content on an illegal basis.

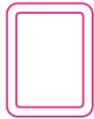


COMPUTER

- **Computer and internet ownership are saturating.** Having access to a computer (90,1%) and the internet (91,2%) within the family have reached a point of saturation and stabilisation over recent years. The laptop remains the most common type of computer (78,1%). A little over half of Flemish inhabitants have a desktop computer at home (51,1%) whilst 6,3% say they own a hybrid device (a laptop with a touch screen, where the screen can be detached to be used as a tablet).
- **The lack of a computer or an internet connection is still mainly a matter of 'skills', with 'cost' gaining importance as a factor.** Most people who currently do not have a computer (mostly aged 65 years and older) never had one in their household. The main reasons for not having a computer are lack of computer-related skills (45,8%) and lack of interest in computers (24,0%). However, lack of interest has declined as a barrier for computer adoption, as last year 32,7% indicated this to be a major reason for not having a computer at home. The expense of a computer has gained importance as a reason for not having one at home: 11,8% (a growth of 5 percentage points compared to last year) indicate the high cost to be a threshold to buy a computer. Although this is a remarkable increase, it is still a far less frequently selected reason for not having a computer than a perceived lack of skills. This indicates that the digital (or computer) divide is still rather an issue of skills than of financial means.
- Fewer than 1 in 10 (7,5%) have neither a computer nor a tablet nor a smartphone. Almost three quarters of people who do not have access to one of these devices are 65 or older (72,3%). It is notable that half of the Flemish population have access to a computer and a tablet and a smartphone (48,3%). We can also see that where a computer is still the only internet device at home for 15,1% of the Flemish (mainly among those older than 60), only a very small fraction have just a tablet (0,6%) or just a smartphone (0,7%). So a smartphone or tablet is rarely the only gateway to the internet.
- Most people who currently don't have an internet-connection at home never had a connection in the past. Reasons for not having an internet connection at home show a pattern similar to the reasons for not having a computer. It's more a question of lacking skills and interest in the internet, and less of a cost-related issue. Moreover, privacy-issues are rarely reported as a reason for not having an internet connection (1,0%).
- Most people spend an average of 1-5 hours per day (40,1%) at the computer. Almost three in ten of the population (28,3%) use a computer more than 5 hours a day, and 14,9% report using a computer more than 8 hours a day.
- Eight in ten use the computer on a daily basis. The most common daily internet activities on a computer remain reading (77,1%) and sending e-mail (65,8%), browsing information (68,0%), social networking (55,0%) and news consumption (50,2%).

- **Rise of streaming on the computer. Both video and music.** Apart from the daily computer habits, one of the most striking developments is the rise of streaming. When it comes to music, half of Flemish computer users (51,0%) have experience with streaming music and a third of these (33,5%) say that they do this on at least a monthly basis. These are increases of 5,0 and 5,5 percentage points respectively in comparison with last year. When it comes to streaming of films and series, we can see an increase of 4,4 percentage points to a quarter of the Flemish population (25,9%) who do this regularly (at least monthly). An increase that we can attribute for a large part to Netflix.
- **More illegal downloads. Compensation for streaming?** Just like last year, we see that music is being downloaded legally more often than films or series. 48,4% of those who have ever downloaded music say that they do this mainly or entirely legally (a reduction of 1,9 percentage points in comparison with last year), while for films and series this is just 31,3% (-5,3). It is noteworthy that the proportion who state that they mainly or only download legally is falling in comparison with last year, both for music and for films and series. It is important to note that we are not making any claims about the number of downloads. A possible explanation could be that fewer films/series and less music are being downloaded because people are streaming more audiovisual content (e.g. through Netflix). And what is downloaded on top of this streaming, is more often illegal. This hypothesis is fuelled by the fact that there is a significant relationship between streaming and downloading of content: the weekly downloading of content is more often seen among those who stream content weekly. digiMeter cannot make any claims on the reasons behind this. Although the following two motivations do seem the most obvious: firstly because the content is not (easy) to find legally and secondly because it feels 'justified' as people have already paid for digital streaming (e.g. by paying for Netflix) and that compensates for these 'few' illegal downloads.
- In streaming, we can also see that music is streamed legally (75,7%) more often than films or series (51,9%). It is noteworthy that both for music and for audiovisual material, the proportion that mainly or only stream legally is higher than the proportion that mainly or only download legally.
- **Streaming mainly takes place legally, downloads mainly illegally.** This appears to be the trend. The rise of paid services like Netflix and Spotify means that people are streaming more. On the other hand, this does seem to cause people to find a 'justification' for downloading more illegally for the rest of their music and video consumption.

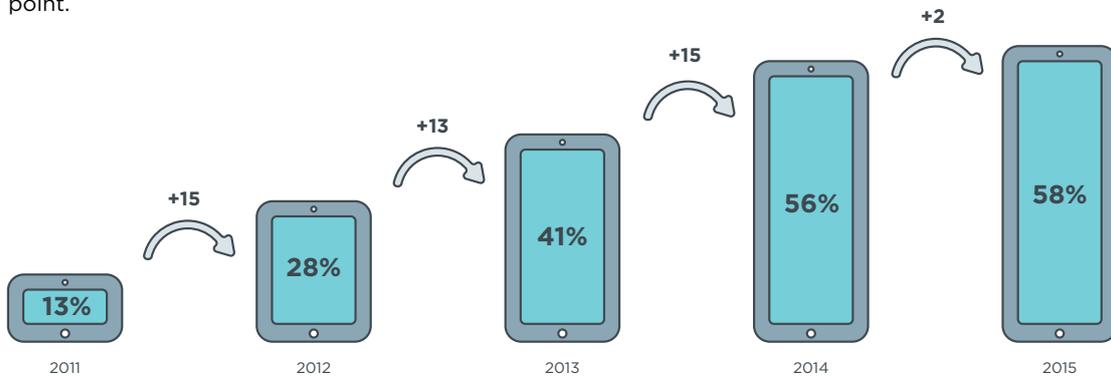
TABLET



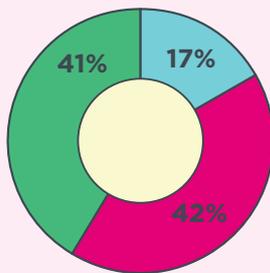
TABLET: Stagnation both in ownership and in use

Adoption of tablets in the past 5 years

After years of strong growth, the adoption of tablets in Flanders seems to have reached a culmination point.



Use of tablets



Who uses the most frequently used tablet within your family?

-  mainly myself
-  both myself and others
-  only others



Two types of tablet users seem to emerge: the tablet as a shared device within the family, and the tablet as a personal device.



Young families

Tablet as a shared device, that is easily passed along the members of the family. For them, the tablet is just one of the many devices available.

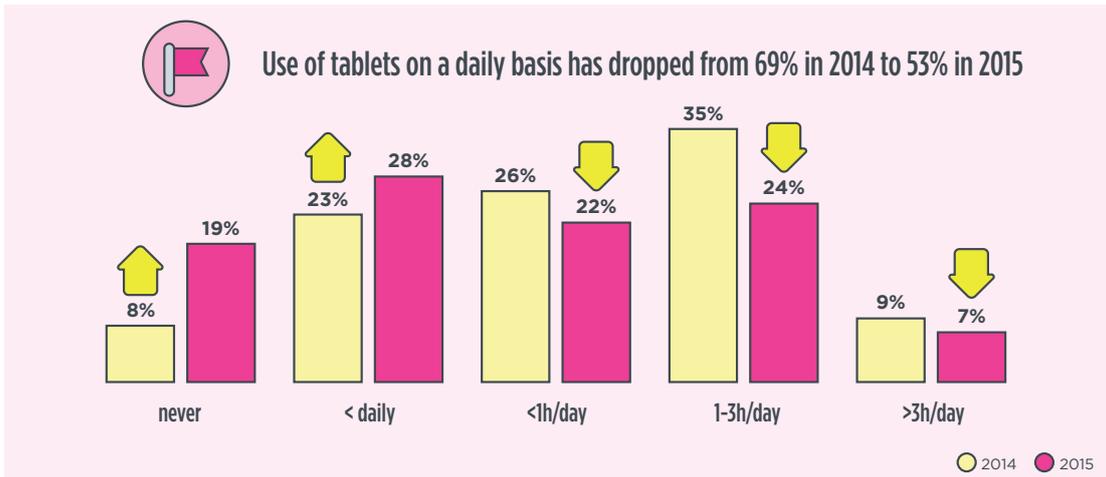


People aged 50+

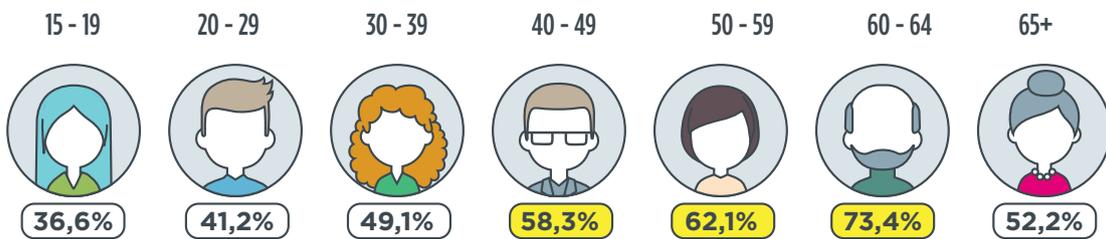
Tablet as a personally owned (and used) device. To them, tablets represent the central gateway towards digital media.

Daily use of tablets

Not only do tablets seem to have reached a level of stagnation in terms of adoption, tablet owners also indicate to use the tablet less frequently compared to last year.



The daily use of tablets reaches its highest level among the 40-64 year olds



TABLET

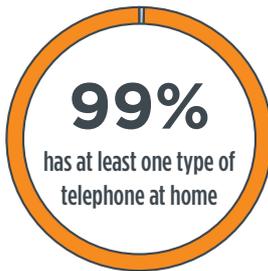
- **Tablet growth falters.** The adoption of tablets seems to have reached a stagnation point. Almost six in ten Flemish people (58,3%) say they now have access to a tablet in the household. This is an increase of 2,5 percentage points in comparison with 2014. Last year, the increase was as much as 14,4 percentage points.
- **Ownership is not the same as use.** 58,3% have access to a table in the household, but only 48,5% of Flemish inhabitants actively use this themselves.
- Half of the most frequently used tablets are iPads (Apple iOS) and 38,4% of all tablets run on Android.
- Tablet adoption is the highest among people under 50, peaking at 15-19 year olds (75,8%) and 40-49 year olds (74,3%). The fact that both age groups are very similar is no surprise. The 15-19 category often still live with their parents, and these parents are often 40-49 years old. Since we are asking about the ownership of tablets within the family, it is not illogical that the two age groups show a similar adoption rate. There is a difference in use between the two groups, however. Of those aged 40-49 who have access to a tablet within the family, 58,3% say they use this daily themselves. Among 15-19 year olds this is only 36,5%.
- **Two groups of tablet users.** The tablet seems, on the one hand, to be mainly something for households with (young) children, in which the tablet is often shared among different members of a family, and on the other hand for slightly older, higher educated people who consider it primarily a personal device. We can also see notable differences in use between the two groups. In those younger than 50, we see higher use of entertainment applications (chatting, taking and sharing photos, consumption of music and audiovisual content). In those older than 50, we see higher use figures for more functional applications (emailing, searching for information, visiting news websites, online banking). We can also identify a clear age difference in the area of connectivity. For those younger than 50, the tablet is used quite sporadically at home on the sofa or in the bedroom. So the Wi-Fi connection at home is sufficient for connection to the internet. For those older than 50, the tablet takes a more central position and the device is also used outside the home. This translates to higher use of Wi-Fi networks at other people's homes, public hotspots and mobile internet.
- **Adoption intention for tablet falls.** The intention to buy a tablet in the coming 12 months fell significantly over the past year. Last year, 29,0% indicated that they were considering buying a tablet within the year, this year it is only 20,6%. The largest decrease is among those who do not yet own a tablet. Within this group, we can see that last year, 32,4% were still considering buying a tablet, while this year it is only 21,2% (a decrease of 11,2 percentage points). Those who have access to a tablet are also less inclined to buy a new tablet in the coming 12 months (a decrease of 6,0 percentage points). This significantly reduced intention to purchase supports the hypothesis that the adoption level for tablets in Flanders is gradually reaching saturation point.

- The frequency with which a tablet is used, appears to be falling. Last year, 69,4% of people with access to a tablet, stated that they used this daily themselves. This year it is only 53,0%. The proportion of 'heavy users' (more than 3 hours on the tablet per day) has also fallen slightly by 1,9 percentage points (from 8,7% in 2014 to 6,8% in 2015).
- Although tablets can be connected to the internet in various ways, the most common type of internet connection for tablets is the Wi-Fi network at home (88,3%). 9,6% have a mobile internet connection for their tablet using a sim card (via a subscription or a prepaid card).
- E-mail (reading 41,9% and sending 34,1%), searching for information (39,8%), social media (37,4%) and visiting news sites (29,14%) are the most popular daily activities on a tablet.
- **Overall, we can say that the tablet is stagnating, both in terms of adoption and in the area of (frequent) use of the tablet.** Adoption is still growing, but the growth has decelerated significantly in comparison with previous years. Daily use of the tablet is falling sharply and this is also apparent in the activities carried out daily. For many people, the tablet no longer seems to be the first device they reach for to consume digital content or perform an online activity. An exception to this rule are the older segments, for whom the tablet is more often used as a personal device (that is not shared with other people within the family) and is more central in their media consumption pattern. Where the tablet is losing ground, this is mainly picked up by smartphones (with larger and larger screens).

TELEPHONY



TELEPHONE: Smartphone on the rise in Flanders



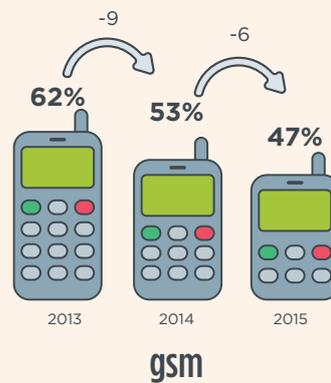
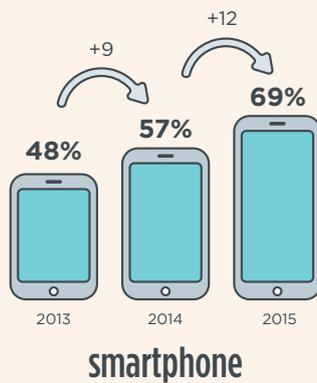
70%
has a fixed telephone line
(landline)



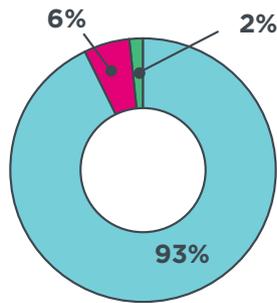
97%
has a mobile phone
(GSM or smartphone)

Evolution smartphone versus GSM

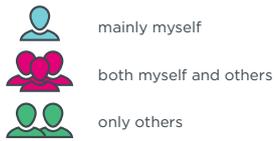
While the adoption of smartphones increases at high pace, the adoption of GSMs decreases year by year.



Smartphone is mainly a personal device

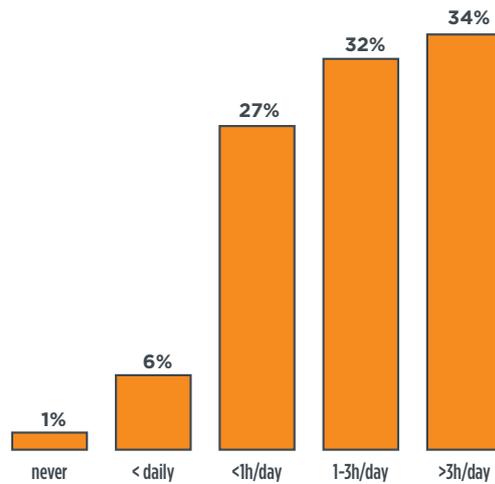


Who uses the most frequently used smartphone within your family?



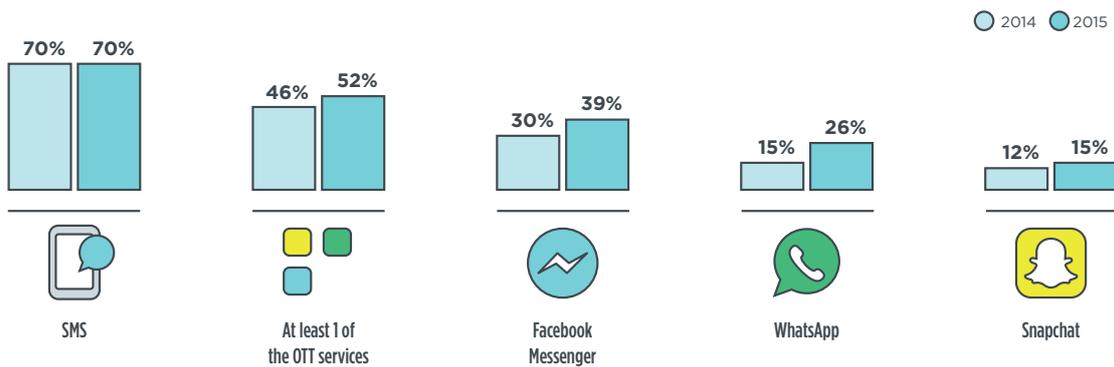
Use of smartphones

Over one out of three smartphone owners (34%) claim to use the smartphone at least 3 hours a day



Mobile messaging

The use of 'Over The Top' services (OTT) like Facebook Messenger, WhatsApp and Snapchat on a daily basis has increased, but that doesn't seem to infect the use of the traditional SMS.



TELEPHONY

- Amid the 'mobile force', landline telephony is holding its ground at around 70%, whilst 97,1% have a mobile phone (whether or not a smartphone).
- **Smartphone on top. Almost 7 in 10 have a smartphone and also use this 'smartly'.** Last year, we saw that the adoption of smartphones (57,3%) was higher than the adoption of GSM (52,7%) for the first time. In 2015, this difference increased rapidly: it is now at 21,6 percentage points. The adoption of smartphones rose by 11,2 percentage points to 68,5%, whilst the adoption of GSM fell by 5,7 percentage points to 47,0%. In 2015, the smartphone was the only device that showed growth in comparison with last year.
- **1 in 3 senior citizens also has a smartphone today.** Ownership of a GSM is highest among the oldest age groups (50+), lower educated people, smaller households (maximum of 2 family members) and those with a lower family income. With almost 7 in 10 members of the Flemish population owning a smartphone, the smartphone has become a device for all sections of society. Even among those aged 65+, we can see that 1 in 3 now own a smartphone. This does not mean that there is not still a clear difference between adopters of smartphones and adopters of GSM. We can see that smartphones have the highest adoption rate among those younger than 50, with a higher education level, living in a medium to large family and with a medium to high family income.
- **In the margin, we can also identify a (temporary?) small but growing group of people who are consciously moving away from the smartphone.** The main reason for not (or no longer) having a smartphone is the lack of added value in comparison with a GSM. Among those who previously did own a smartphone, but have now stepped back from this (around 4,5% of those who do not currently own a smartphone, which represents 1,5% of the population of Flanders), the experience with a smartphone has led to them deciding that it does not work for them, to developing a dislike for it (for privacy reasons or because of dependency/health reasons) or to finding they use it too little.
- Android remains the most popular smartphone operating system at 52,8%, with iOS in second place at 31,9%.
- **Smartphone use: 'smart', but most importantly 'often'.** Almost everyone who owns a smartphone also uses this daily (92,5%). Around one in three (34,0%) say that they spend more than three hours on their smartphone daily.
- Over half of all smartphone owners use their smartphone for reading e-mail (63,0%) and checking social media (60,4%) on a daily basis.
- We previously saw that one in three people aged 65+ now have a smartphone. However, daily use of their smartphone is significantly lower than in other age groups. Only the daily use of online banking on the smartphone is higher among those aged 65+ (12,5%) than in the total population (7,0%).

- OTT communication is booming. SMS vs. OTT: accumulation rather than cannibalisation.**

On smartphones, people still most often make calls via the traditional mobile network (42,6% daily). However we do see that almost 3 in 10 smartphone users (29,4%) say they use a web application such as Skype or Facetime on the smartphone for a telephone conversation. When it comes to sending messages, we have found that classic text messages are comfortably holding their position in Flanders, with 70% of smartphone users sending a text message daily. Use of so-called 'over the top' services² is increasing, with 51,8% making daily use of one of the listed OTT services. This is an increase of 5,2 percentage points in comparison with last year. The most popular messaging apps are Facebook Messenger (39,3%) and WhatsApp (25,7%). Both have also seen the biggest increase in comparison with last year (+9,6 and +10,7 percentage points, respectively).
- If we split the figures for daily use of messaging services by age group, we can see that both daily sending of text messages and sending messages via web application is very popular among young smartphone owners (aged 15-29). So (in the short term), the increasing popularity of OTT messaging services has not had a cannibalising effect on text messages via the classic mobile network; both seem to be used alongside each other. Among the applications we can see a number of notable age differences. Snapchat, for example, remains a very popular medium among young people: 66,5% of smartphone owners between 15 and 19 say that they use Snapchat every day, among 20-29 year olds this drops to 32,1%, and in the older segments it is below 8%. WhatsApp on the other hand, has a slightly more level profile (37,0% in the youngest segment compared with 11,3% in the oldest segments). Facebook Messenger remains the most popular online messaging service within every age group, however, with the exception of those aged 65+, where WhatsApp has a higher daily adoption.

² Content and services are offered through "over the top" services, which cut out traditional providers. Netflix offers films and series online without the need for a cable subscription, for example. There are over the top players in telephony too, such as Skype or Facetime for spoken communication and Facebook Messenger or WhatsApp for over the top messaging services. These providers are causing a shift among traditional mobile operators such as Proximus, Base and Mobistar. You no longer need calltime or SMS volume, an internet connection is enough.

SOCIAL MEDIA



SOCIAL MEDIA: User profiles and main figures



FACEBOOK

By far the most popular social network in all layers of the Flemish population.

Account and logged in over the past month	70%
Account but not logged in over the past month	4%
I have deleted my account	3%
I never had an account	27%



44% spends at least 1h a day on Facebook



50%

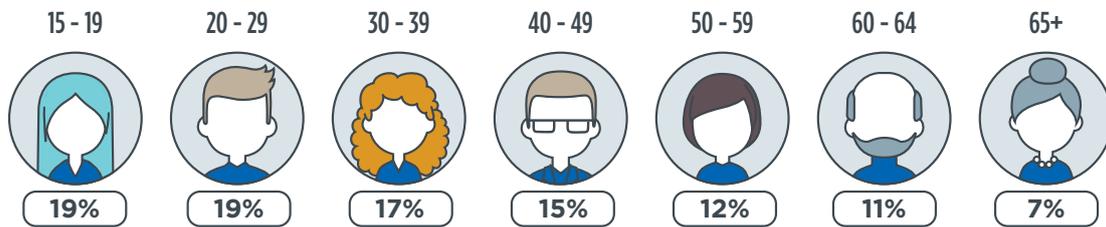


50%



30% is older than 50

Age distribution of Facebook users



Main motivations in use

67% maintaining personal contacts

43% online visibility

30% passing time



GOOGLE+
 High number of accounts, low effective use.
 Indeterminate position in the world of social media.

Account and logged in over the past month	23%
Account but not logged in over the past month	22%
I have deleted my account	1%
I never had an account	54%



7%
 spends at least 1h a day
 on Google+

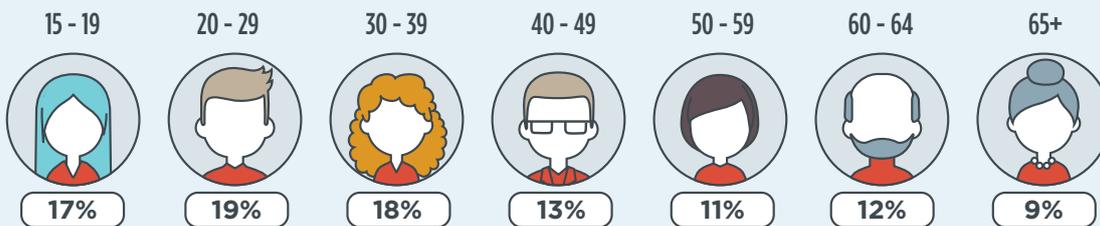


57%



43%

Age distribution of Google+ users



Main motivations in use

No remarkable strengths compared to other networks

27%
 online visibility is most cited as the main reason to use Google+



LINKEDIN

Remains n°1 social network for professional purposes in Flanders.

Account and logged in over the past month	19%
Account but not logged in over the past month	10%
I have deleted my account	1%
I never had an account	69%



3% spends at least 1h a day on LinkedIn



65%

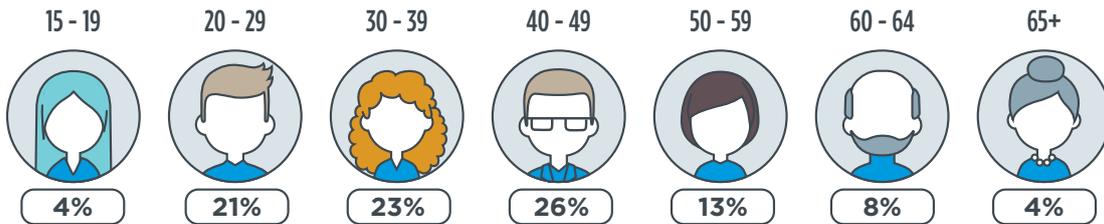


35%



Mostly men in active professional career

Age distribution of LinkedIn users



Main motivations in use

67% set up and maintain professional contacts

30% job search



TWITTER

Despite the fact that Twitter has become an important source of news, the network is still overshadowed by Facebook in terms of use.

Account and logged in over the past month	19%
Account but not logged in over the past month	12%
I have deleted my account	2%
I never had an account	68%



12% spends at least 1h a day on Twitter



65%

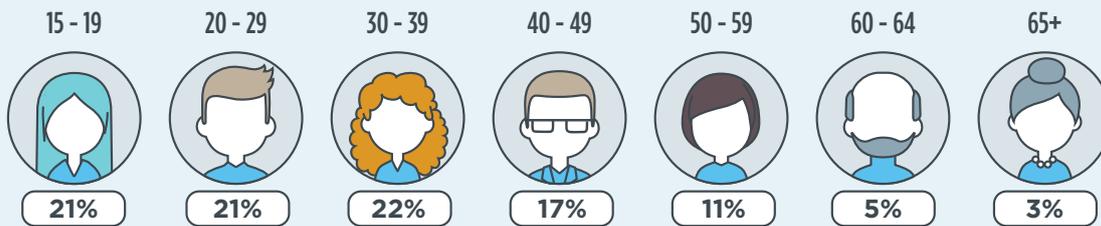


35%



Mostly men between 15 and 39 years old

Age distribution of Twitter users



Main motivations in use

39% following other persons or organizations

34% news monitoring

25% opinion sharing



INSTAGRAM

Browsing and sharing pictures on Instagram is mainly within the youngest segments a popular activity.

Account and logged in over the past month	17%
Account but not logged in over the past month	7%
I have deleted my account	1%
I never had an account	75%



21% spends at least 1h a day on Instagram



49%

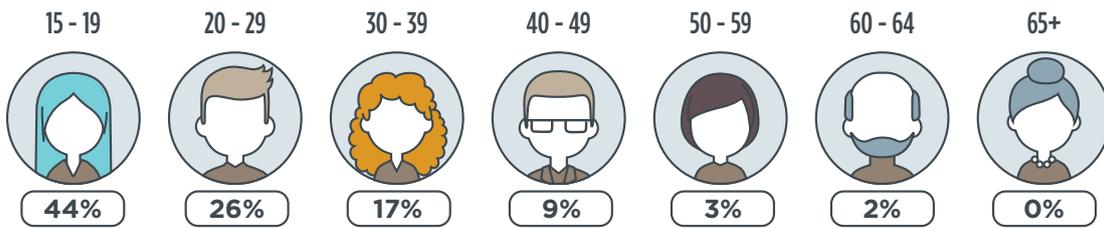


51%



Mostly young people (15-19 years old)

Age distribution of Instagram users



Main motivations in use

38% consuming and sharing visual content

30% passing time

SOCIAL MEDIA

- The number of Flemish residents with a social media account is stagnating. In 2015, 77,0% of the Flemish population has an account on at least one social media site.
- Having an account doesn't necessarily mean using it often. While 77,0% of the respondents have an account on at least one social media site, only 72,4% of the population has logged in on a social network site in the last month.
- **7 in 10 are active social media users in Flanders. Facebook rules.** When asked about the social networks on which the Flemish have an account, Facebook (70,4%), Google+ (45,0%) and YouTube (41,7%) are the most cited names. If we look at which social network sites respondents logged into last month, we also see the same three but in a different order. Facebook remains authoritative in first place (66,9%), but YouTube (29,9%) now beats Google+ (23,4%) to second place.
- **Facebook: stagnation in active users?** Facebook is still on top in social media land, but there no longer seems to be much margin in the 'net growth'. This doesn't mean that we are looking at a real standstill. New Facebook users are still being added, but this growth is being largely offset by people who are consciously taking a step back (as much as around 2,5% of the Flemish population). After the small group of Flemish people who seem to be consciously stepping back from the smartphone (1,5%) we can also see a small group who are turning their backs on Facebook (for privacy reasons or because of lack of time and 'relaxation'). It is still too soon to make far-reaching conclusions, but we will definitely be watching to see whether this trend continues over the coming years.
- Those with a Facebook account seem to be the most active users: 95,0% of the Flemish population who have a Facebook account, have logged in to their account in the last month. With seven in ten account owners having logged in during the last month, Instagram and YouTube (both 71,7%) share a second place when it comes to 'active use'. Google+ has largest number of 'sleeping accounts'. Pinterest and Instagram are gaining most in active users.
- Facebook has the highest usage frequency: 43,8% of the Facebook account owners use it at least one hour a day (+3,9). Instagram also has a loyal and active fanbase, with one in five (20,6%) using it at least one hour a day. For Twitter (12,1%), LinkedIn (2,6%) and Google+ (7,4%) this is far less.
- **Privacy paradox.** Amidst all this, we can see that the Flemish are increasingly struggling with the privacy paradox. In stark contrast to the minority of people who are distancing themselves from devices like laptops, smartphones or tablets for privacy reasons (see chapters Computer, Telephony and Tablet in the full report, respectively), a growing number of Flemish people are worried about their privacy on social media (41,2%; +5,5 percentage points), but at the same time admit that they are disclosing more and more on social media (28,4%; +3,0 percentage points).

GAMES



GAMING: Adoption of game consoles remains stable

Despite the rising adoption and use of mobile devices (especially smartphones), the adoption of game consoles remains stable in Flanders.



31%
FIXED GAME CONSOLE

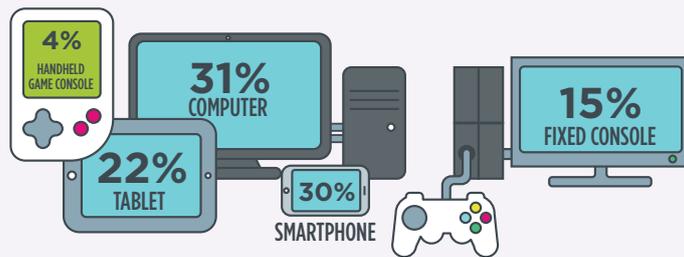


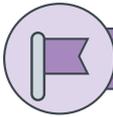
16%
HANDHELD GAME CONSOLE

Frequency of gaming

55%

More than half of the Flemish population has **played a digital game in the past month**, mainly on a computer, smartphone or tablet.





Gamer profile depends on used platform

The profile of the Flemish gamer depends on the device on which the game is played: Consoles are mainly used by men younger than 30, computers are more evenly distributed on gender and age, mobile phones are mainly used by people younger than 50, and tablets mainly by 30-49 year olds.

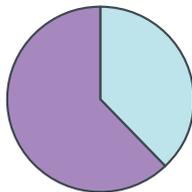
	♂	♀	15-29	30-49	50+
Fixed game console	67%	33%	51%	40%	9%
Handheld game console	60%	40%	56%	29%	16%
Computer	53%	47%	32%	31%	38%
Smartphone/GSM	49%	51%	41%	42%	17%
Tablet	47%	53%	24%	42%	34%



24%

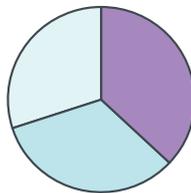
of the Flemish gamers claims to **play at least 1h every day**. Most likely they are male gamers who use multiple devices.

Gender



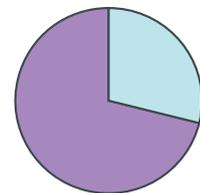
♂ 62%
♀ 38%

Age



15-29 37%
30-49 33%
50+ 30%

Number of devices



+1 device 71%
1 device 29%

GAMES

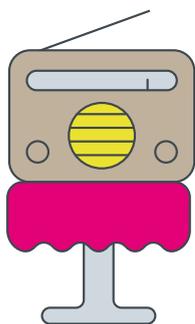
- 55,1% of the Flemish population played a digital game in the past month. The most common devices to play games on are the computer (31,2%), the mobile phone (30,4%) and the tablet (22,3%). The significant drop for tablets (-9,0 percentage points in comparison with last year) is noteworthy. This change fits with the overall decreasing popularity of the tablet. Not only is growth in adoption falling sharply, the daily use has also fallen significantly (see chapter Tablet).
- A third of the Flemish population (33,5%) say that they have a games console at home. The most popular remains the fixed games console, which is connected to a television set (30,5%). Portable consoles stand at around half of that figure, with 15,8% of the Flemish now having a handheld console at home. These adoption figures have remained fairly stable over recent years and have even risen slightly. Despite the growing number of other devices on which digital games can be played (think of the tablet and smartphone), games consoles do not seem to be suffering in the short term.
- Where the gender difference between gamers and non-gamers has gradually disappeared, we do still see that age has a major impact. Among 15-29 year olds, over 8 in 10 have played a game last month, whilst among those in the 30-49 age category this figure is more than 6 in 10 and among those aged 65+ it is 3 in 10.
- There is a clear difference in profile if we look for each type of device at who has played games on that device in the past month. The fixed games console still sees the most stereotypical image of the typical gamer: mainly men and mainly younger than 30 (with a peak between 15 and 19 years old). With regard to gaming on the computer, the profile is more level, with an almost equal proportion of men and women who have played a game on the computer last month. The age difference is also less pronounced than for the fixed games console, but we do still see that gaming on the computer is more common among 15-19 year olds (50,8%) than those aged 65+ (23,6%). With regard to gaming on a mobile phone, we can see a strong age difference, but an even distribution in terms of gender. Gaming on the tablet bucks the trend. Not only are women represented slightly more than men, we can also see that a quarter of those who play a game on the tablet monthly are between 40 to 49 years old (so there is a slightly older profile than for gaming on other devices).
- Almost half of those who played a game last month, say that they play less than daily (48,5%). It is interesting that the group of heavy gamers who play for at least one hour per day is growing. Last year, 21,9% played for at least one hour a day, this year it was 24,0% (+2,1 percentage points).
- Heavy gamers not only spend more time gaming (at least 1 hour a day) but also demonstrate greater diversity in the devices used. More than 7 in 10 heavy gamers have played on at least two different devices last month (most often computer and smartphone). Among those who play for less than 1 hour per day, this is only 47,7%. If we look at each separate device, use is always higher among the heavy gamers. An exception to this is the tablet. Use of the tablet as a gaming platform is as high for light gamers as for heavy gamers (both 40,5%).

TRADITIONAL MEDIA



TRADITIONAL MEDIA: Radio, music and news

Radio



Listening to the radio still most frequently occurs in the car or at home via a traditional radio set.

Car radio



51%
daily

Radio set at home



50%
daily

Internet radio



10%
daily

DAB radio set



3%
daily

Online music

YouTube remains the most popular channel to listen to online music. One out of four users of Spotify has a paid account, while two out of three users of iTunes have paid for music on iTunes. Within 3 months after the launch of Apple Music, 4% of the Flemish people claims to try out this music streaming service.

YouTube



45%

of the Flemish population
uses YouTube to stream
music

Spotify



25%

of the Flemish population
uses Spotify



25% of those users
has a paid account

iTunes



24%

of the Flemish people
uses iTunes



66% of those users
has paid for music
on this platform

Apple Music

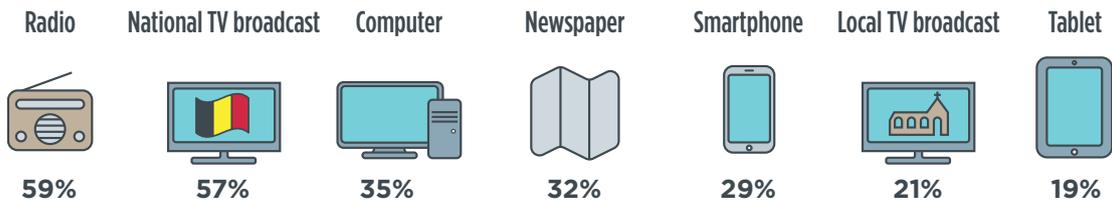


4%

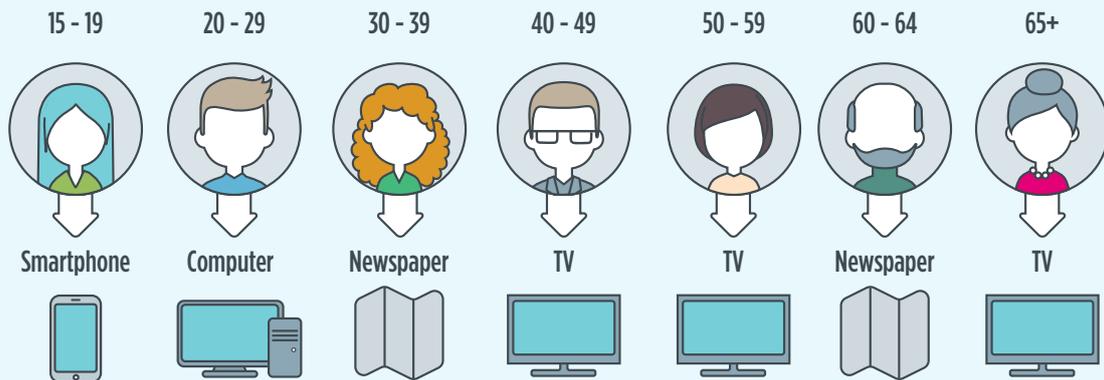
of the Flemish population
uses Apple Music

News

Over half of the Flemish population monitors the news on radio and television on a daily basis. The smartphone has established itself as a daily gateway to news for three out of ten Flemish people.



What device do you prefer to monitor the news?



TRADITIONAL MEDIA

RADIO

- Half the Flemish population listen to the radio in the car or at home via a radio set.
- In total, around 3 in 4 Flemish people say they listen to the radio daily through at least one of the listed channels (car radio, radio set at home, internet radio or DAB radio). Almost 9 in 10 (88,2%) of respondents claim that they listen to the radio on at least a monthly basis.

MUSIC

- 59,5% (+3,2%) of the Flemish population reports to have consumed online music in the last month. Men and people in younger age categories are more likely to use online music channels.
- YouTube remains by far the most popular online source for music (45,3%).
- Less than one in four (22,1%) reports that they also pay for online music via the suggested music channels (either buying music or having a paid subscription). When people pay for online music, it is most likely via iTunes (15,9% of the population).

NEWS

- Radio (58,9%), national television (56,8%) and the computer (35,2%) are the sources most commonly used to consume news on an everyday basis.
- Following news through more traditional channels such as radio, national television, computer and the printed newspaper is a daily routine for an increasingly small number of respondents. The majority of Flemish inhabitants say that they still use these channels on a monthly basis to consult the news.

- **The smartphone is the only climber when it comes to news consumption.** The classic radio and television channels continue to dominate, although they are losing some ground, just like the tablet. The smartphone, on the other hand, has increased by 5,0 percentage points as a daily news source. This has become a daily news source for three in ten members of the Flemish population making it as important as the printed paper on a daily basis. In contrast to many other emerging mobile habits, it seems that news consumption is not limited to young people. The rise of mobile news consumption on smartphones manifests itself in all age groups under 50. People seem to read news mainly on a personal device and less on a shared device. The use of a shared printed newspaper is falling, but shared digital media such as tablets are also starting to be used less. Only the group for whom the tablet is a personal device (the 40-65 year olds, see chapter Tablet) have developed a very clear habit of following the news daily on a tablet. In families with children, this happens much less frequently.
- If we look into detail at the digital news sources, visiting news sites is most popular (68,9% have visited a news website last month), mainly by means of a computer. With the exception of reading a digital newspaper, the smartphone has a higher user base than the tablet. Personalized news apps (such as Flipboard, Feedly, Zite) are not that common yet, as only 8,8% have used one during the last month.
- If we ask about the preferred medium for following the news, it is primarily the more traditional channels, such as television (25,2%) and printed paper (22,2%) that come out on top. We do see clear differences between the age groups, however. With regard to the 15 to 19 year olds, the smartphone is by far the preferred device (31,1%). Among those aged 20-29, the computer (19,8%) and the printed newspaper (18,9%) receive the highest scores. From the age of 40, the television screen and printed newspaper represent the media chosen most often to follow the news.

GENERAL MEDIA USE



GENERAL MEDIA USE:

Telecoms, wearables, data storage and most indispensable devices

Changes in telecoms subscriptions



When people do make changes regarding their telecoms subscriptions, they are mainly making the shift to another mobile provider. The other most common modifications are upscaling the internet subscription and changing to another internet provider.

Switch of mobile provider (Telenet, Mobistar, Proximus, Mobile Vikings, Base,...)	10%
Upscaling of internet subscription	8%
Switch of internet provider (Telenet, Proximus, Scarlet,...)	6%

Wearables



8% of the Flemish population claims to have access to a wearable. Most common types are smart sports watches, smart wristbands and smart watches.

Smart sports watch



4%

Smart wristband



2%

Smart watch



2%

At least 1 type



8%

Data storage



Flemish people are still more familiar with data storage on physical devices than with online data storage (cloud). A remarkable outcome is that, besides Dropbox, mailing files to yourself is the most common practice of online data storage.

Internal memory
of device



67%

External, physical
storage location



51%

At least 1 of
the following:



49%



25%
Dropbox

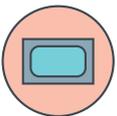


21%
Mailed to yourself
as an attachment

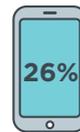
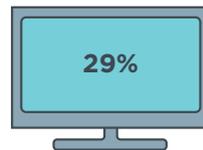


17%
Google drive or
Google docs

Most indispensable technology



Television sets, smartphones and laptops are the most indispensable technologies for Flemish people.



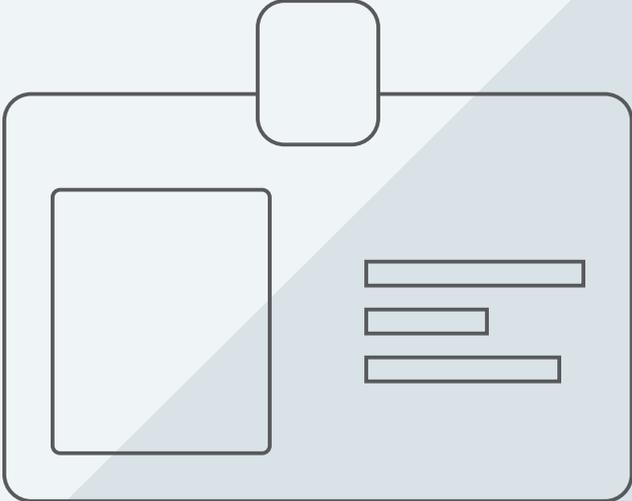
GENERAL MEDIA USE

- **Churn for mobile, upgrade for internet.** Almost 8 in 10 people said they did not make any changes to any of the listed subscriptions last year (79,4%). The most common change was switching network provider (10,2%). 8,0% of the Flemish population say they took out a larger internet subscription in the past year. This is connected to the higher level of video consumption via the internet. Within this group, a quarter say they have a subscription to Netflix (25,4%). This is much higher than the total population (11,5%, see chapter TV). This finding seems to confirm a proposition from the digiMeter Netflix study³: the arrival of Netflix is causing a lot of people in Flanders to exceed the data limits within their internet subscriptions for the first time, meaning that an upgrade to a larger subscription is desirable or even unavoidable.
- With 7,6% owning wearable tech, we can't yet talk about a wide-spread adoption of these devices. At present, those who own wearable tech are mainly men (68,9%) between the ages of 30 and 49 (49,9%) and almost all people adopting wearable tech are almost entirely (92%) also to be found in the segment of smartphone owners (the device for/to which the wearable tech is often an extension). The most popular wearable tech items are smart sports watches (3,5%), smart wristbands (2,4%) and smart watches (2,2%).
- When asked about the intention to buy a device in the near future, 21,0% say they would choose a laptop and 19,9% say they would choose a tablet. We can see some notable differences between age groups, however. Those younger than 30 would mainly prefer to purchase a smartphone or laptop. For those aged between 30 and 59 we notice an increased preference for purchasing a tablet. The option 'no preference' received the highest score among those older than 60.
- The television set (28,7%) and smartphone (25,5%) are now an intrinsic part of life for most Flemish people. At least, that's what we find when we ask which technology they would least be able to do without. There are in fact large differences within age groups here too. Those aged between 15 and 19, mainly couldn't be without their smartphone (54,0%). Those between 20-39 would also find it difficult to be without their smartphone, but here we see a higher score for the laptop. The highest score for the tablet as an indispensable device is among those aged 40-49 (11,7%), although the scores for the smartphone (35,0%) and television set (21,6%), for example, are higher again. From age 50 onwards, the television set is by far the most indispensable media device.
- Use of cloud services to store data is certainly no longer a niche product, with 49,1% having used at least one of the listed storage locations (Dropbox, Google Drive/Google Docs, iCloud, One Drive, Amazon Cloud Drive or as an attachment in an email you send yourself) in the past month. Physical storage locations are still more widely used, however, with the device's internal memory (e.g. the internal hard disk of a computer) in particular as a popular storage location (67,1%). With 25,1% of the Flemish population having used it last month, Dropbox is the most popular online storage service. It is interesting that more than 1 in 5 people emailed a file to themselves in order to make it available online last month (21,6%). Despite the increasing number of (free) online storage services, emailing files to yourself is still a very popular way to store data online. The storage service from Google, such as Google Drive and Google Docs were used by 17,0% of the Flemish population last month.

³ You can find more information on the digiMeter Netflix study at http://bit.ly/dM_Netflix

PROFILES

PROFILES



PROFILES

As in previous years, we conclude this report with a segmentation of the Flemish media and technology consumers. This segmentation is based on two factors assessing the use of the following technologies, devices and media: television, computers, tablets, smartphones, social network sites, games, radio, music and news:

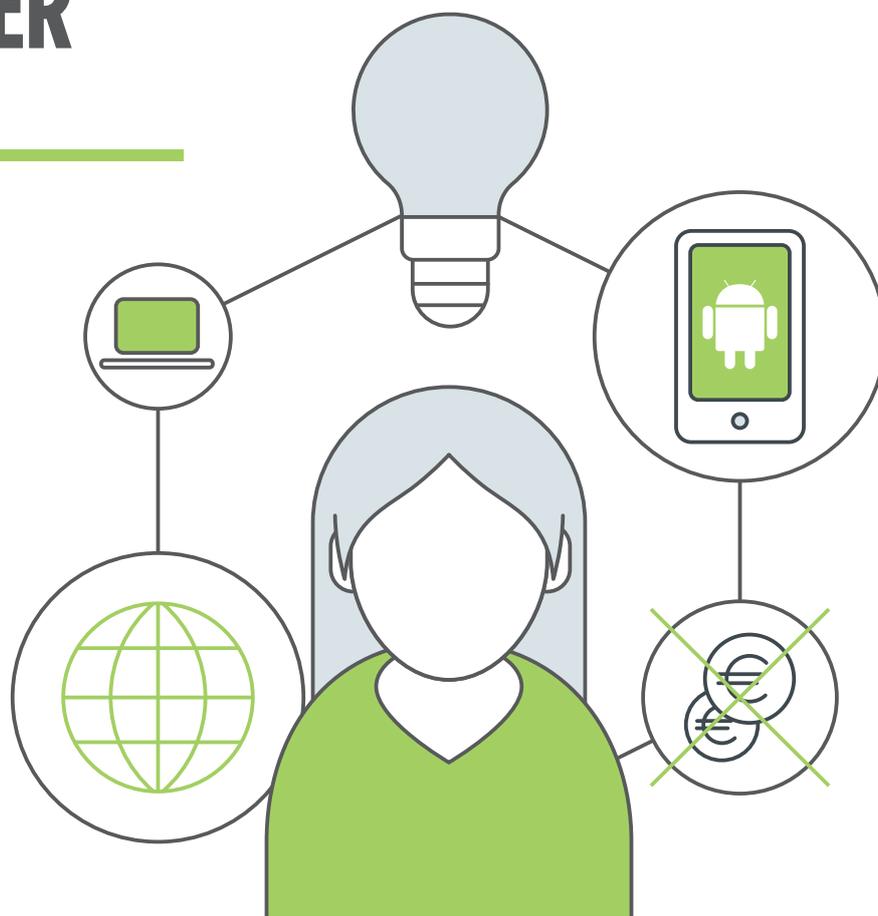
1. **Variety of Use** – based on the reported number of used functionalities
2. **Frequency of Use** – based on the reported number of hours a device or medium is used

The cluster analysis¹ resulted in five segments. While we see a clear link with the segments from digiMeter 2014, there are a number of remarkable shifts.

¹ This analysis is based on a K-means cluster analysis, based on 8 variables that measure the 'variety of use' and 8 variables that measure the 'frequency of use'. This resulted in the five segments we present in this chapter.

ONLINE MEDIA MASTER

(26,1%)



ONLINE MEDIA MASTER

The Online Media Master segment is the only one unchanged in terms of profile, ownership and use of technology compared to last year's report. We do however see a strong increase in size. In 2014, this segment accounted for 21,0% of the Flemish population. One year later, this has risen to 26,1%. It is characteristic for this segment, which contains lots of young people and students, that almost every form of media and communication comes with a very substantial form of online use, and that the 'new' media consumption in terms of devices, is geared mainly towards laptops and smartphones. Like last year, we notice that this segment is not big on paying for media. Illegal downloading is still popular and budgetary constraints force Online Media Masters to make informed choices with regard to their devices. In short, Online Media Masters have fully embraced digital media and technology, both for functional and entertainment purposes. They are more restricted in budget than in time, focusing their spectrum of new devices on smartphones and laptops, while their willingness and ability to pay for content and services remains limited.

PROFESSIONAL EXPLORER

(16,2%)

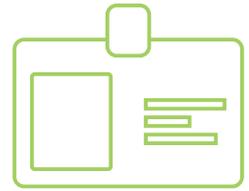


PROFESSIONAL EXPLORER

While the tablet seems to have reached a point of stagnation in Flanders, it has developed into an important media instrument for certain segments. Last year, we saw the rise of the Digital Explorers, who explored the digital world by tablet and formed the biggest segment (24,5%). In 2015, we find the segment has further evolved and split up into two: the Professional Explorers (16,2%) and the Playful Explorers (13,5%). Combined, we see that the number of Flemings for whom the tablet plays an important part in their online consumption pattern (29,7%) has increased by 5,2 percentage points. Besides a clear influx from last year's Digital Explorers, the Professional Explorers also show some traces of Media Omnivores. Professional Explorers are mainly from the higher-educated, active population (30-59 years old, relatively high representation of white-collar workers, civil servants, management and the self-employed). They come into contact with digital media through their jobs. This explains the relatively high frequency of use of office applications across devices and the remarkably high popularity of LinkedIn within this segment. Professional Explorers also bring their workplace habits into their leisure time. They often use mobile devices to follow the news and frequently make use of online music channels (paying or free). Traditional media are still present within this profile, with a higher score for daily radio listening (mainly in the car, for example when commuting to work, which fits the professional character of the profile) and a rather traditional approach to television (mainly linear watching on a TV screen). Professional Explorers have clearly embraced digital technology and media, but primarily use them for functional (professional) purposes. For entertainment, Professional Explorers still revert to back to their old habits with traditional media.

PLAYFUL EXPLORER

(13,5%)



PLAYFUL EXPLORER



Just like the Professional Explorers (16,2%), the Playful Explorers (13,5%) seem to emerge mainly from last year's Digital Explorers. Playful Explorers are usually a bit older and lower educated. They emphasize traditional media but have high adoption rates for tablets and laptops. They use these for functional purposes (email and information) and for gaming. Other forms of tablet or laptop entertainment (downloading/streaming content, news consumption, social media, ...) are yet to be discovered by the Playful Explorers.

TRADITIONAL MEDIA FAN

(24,9%)



TRADITIONAL MEDIA FAN

The Analogue Media Fans and Functional Media Users from digiMeter 2014 have merged into one segment: the Traditional Media Fans. People avoiding all things digital have become increasingly rare in 2015. Everybody has at least some form of digital technology and/or media consumption at home, but for this segment, the traditional forms of media consumption remain the true point of reference. The segment can be characterized as a mix of the Analogue Media Fans (highly focused on traditional, analogue, offline media) and the Functional Media Users (who do have Internet and a computer at home but only use these when necessary). The Traditional Media Fan segment is the eldest and least familiar with new media. They prefer to watch (linear) television or listen to the radio. Any ownership of a computer and Internet at home is purely functional (for purposes like email or finding information) and rarely as a source of entertainment or recreation. Last year, the Analogue Media Fans and Functional Media Users combined, accounted for 32,4% of the Flemish population. The Traditional Media Fans this year represent 24,9%. We can therefore say that the number of Flemings living (almost) without digital media continues to decline (-7,5 percentage points this year).

PROFILES

DIGIMETER PROFILES

