

iMinds digiMeter 2015

Digital Research That Matters

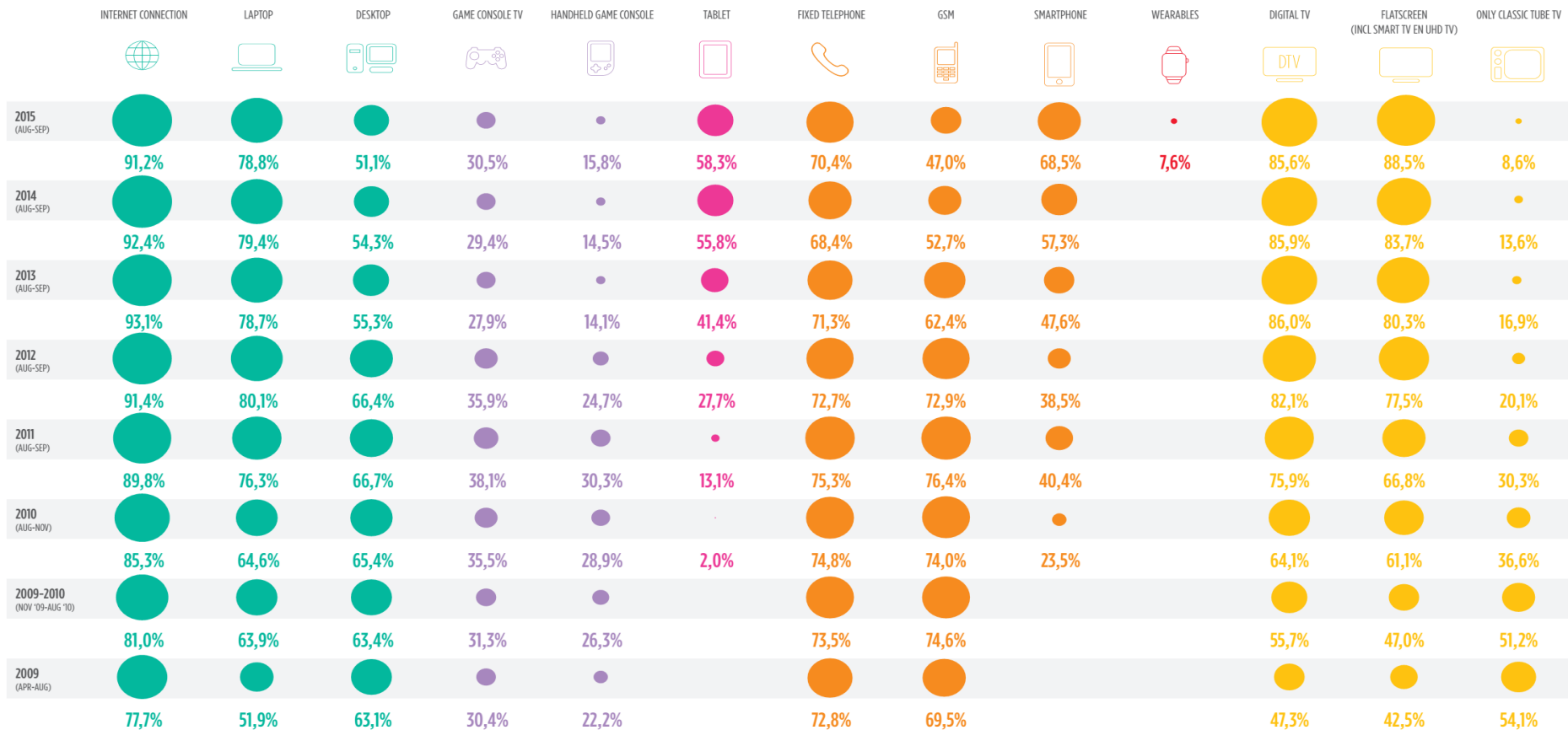
@LievenDeMarez



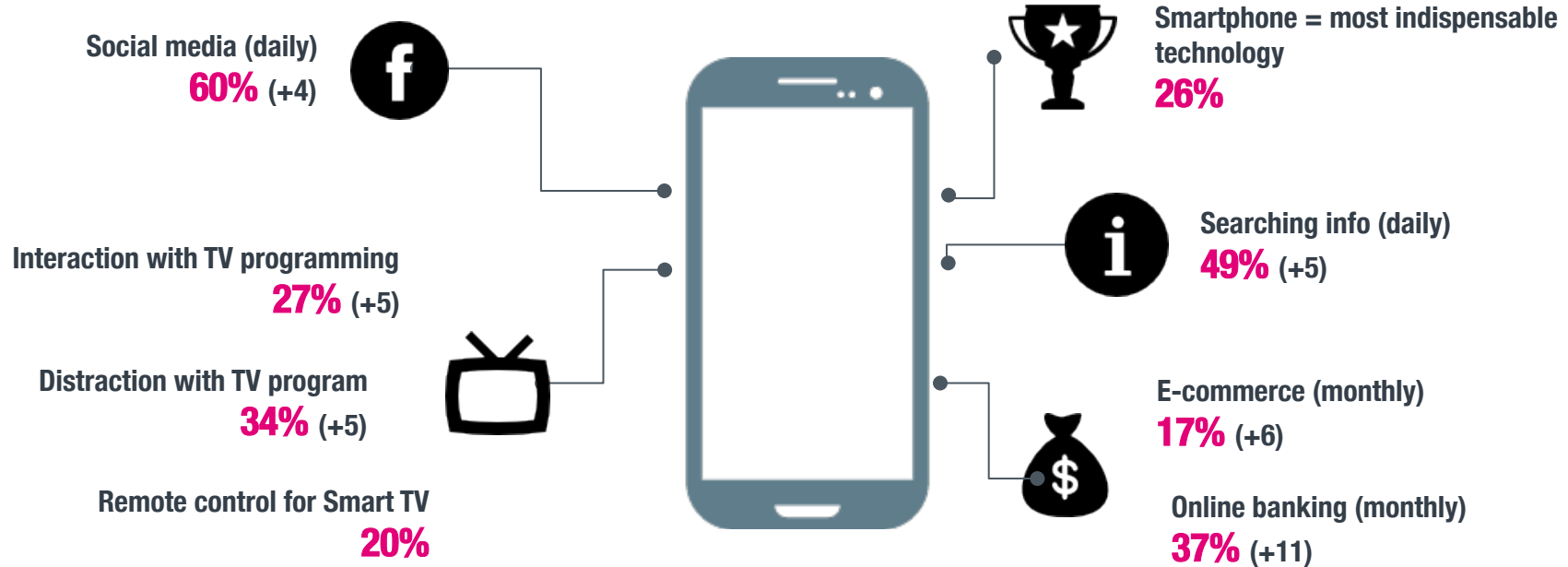
TECHNOLOGY OWNERSHIP

13

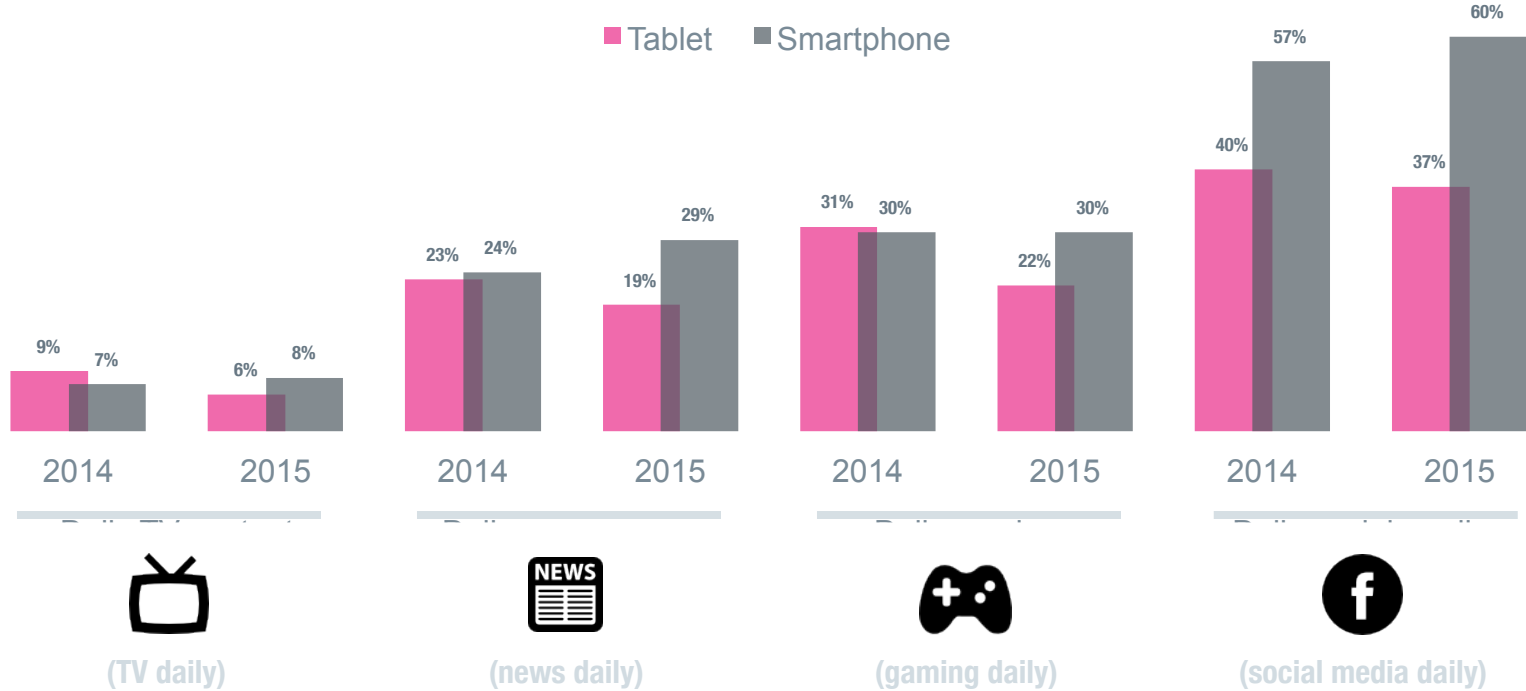
Adoption: Smartphone outpaces the rest



Use: Smartphone catching up

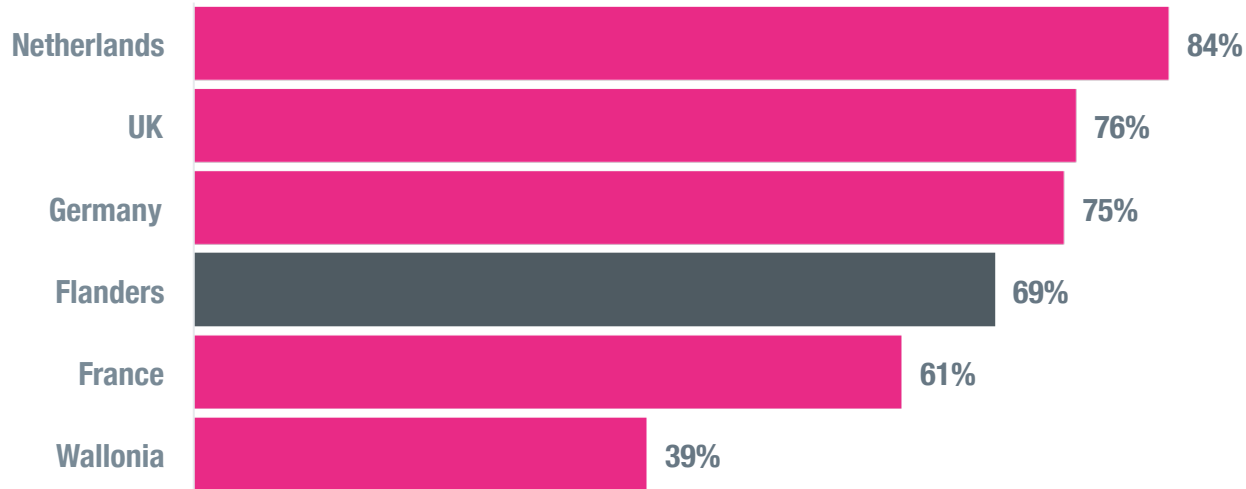


Smartphone beats tablet



But still lagging behind internationally

Smartphone adoption



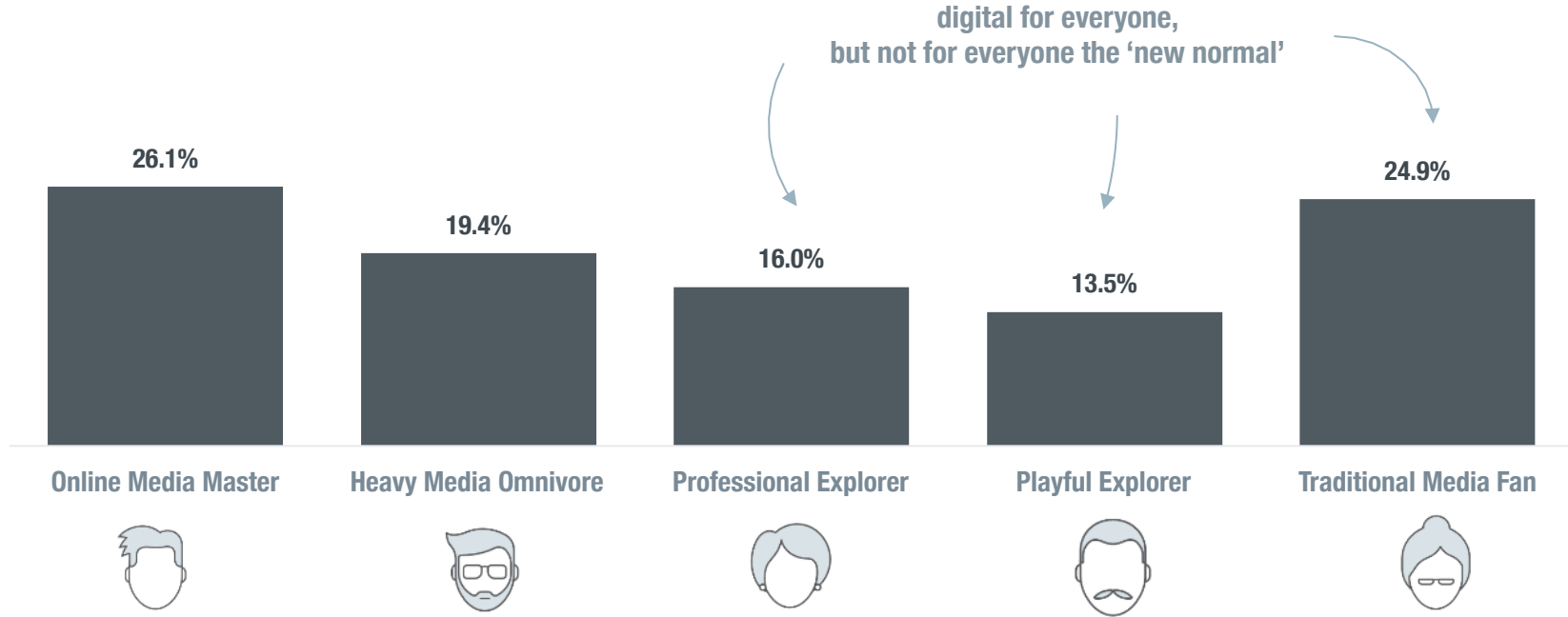
A close-up, artistic photograph of a person's face, focusing on the eyes. The person has dark, well-defined eyebrows and long, dark eyelashes. The left eye (viewer's right) is a natural, light blue color. The right eye (viewer's left) is replaced by a glowing, futuristic blue cybernetic eye with visible internal components. The background is a soft-focus mix of warm skin tones and cool blue tones, overlaid with a pattern of glowing, semi-transparent blue circles and lines, suggesting a digital or data environment.

FIVE CONSUMER PROFILES

User: 5 types of profiles

[FREQUENCY & VARIETY OF MEDIA USAGE]

[QUID ANALOGUE MEDIA FANS?]



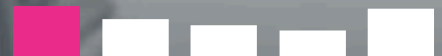


Time, but no money

Digital native (100% digital)

Main devices: Laptop & smartphone

ONLINE MEDIA MASTER – 26.1%





No time, but money

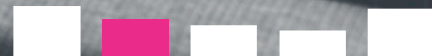
Digital native (100% digital)

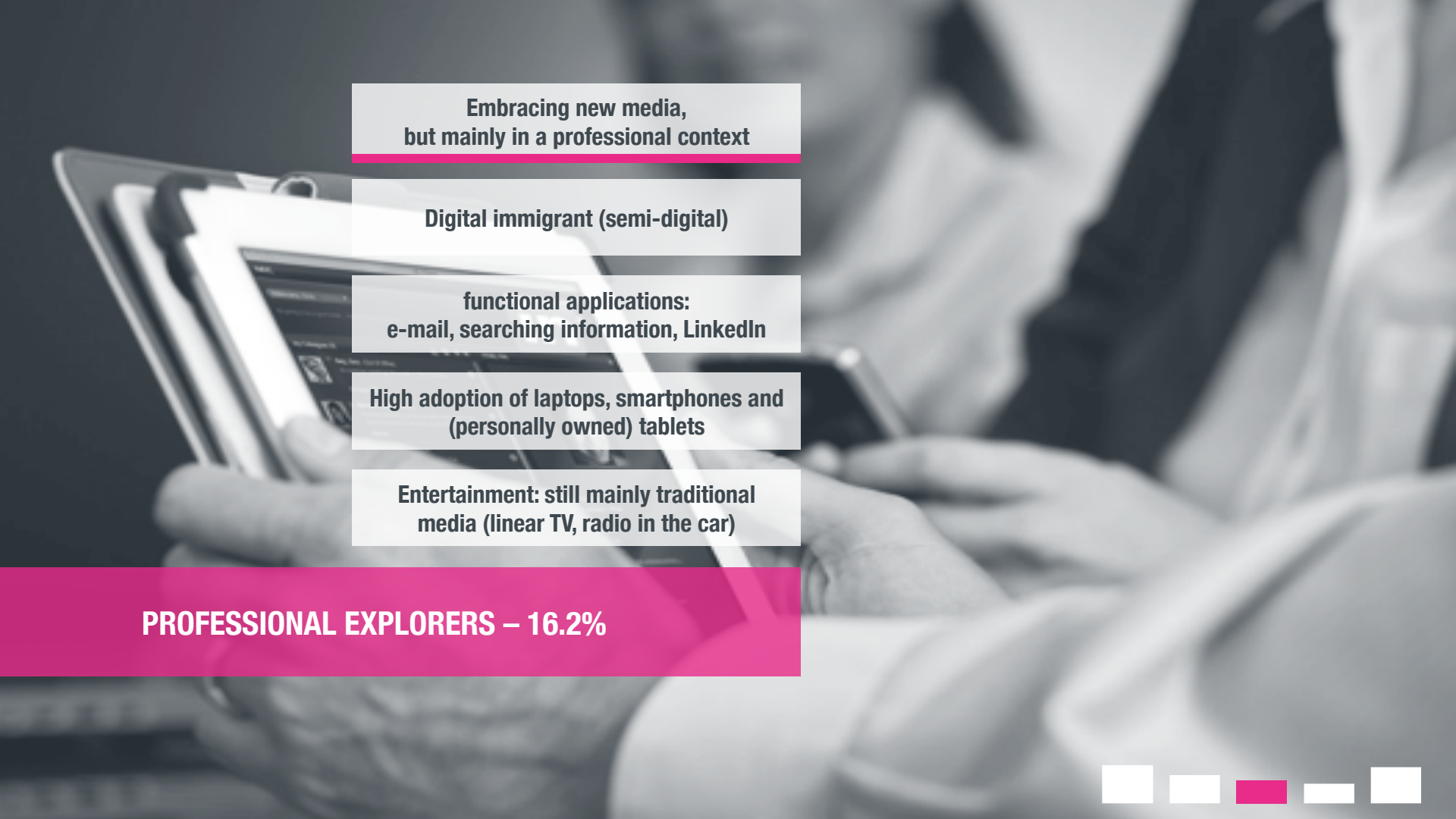
(premium) content and devices

**Traditional + new media
(growing emphasis on new media)**

**High level of media consumption
Both use & possession**

HEAVY MEDIA OMNIVORES – 19.4%





**Embracing new media,
but mainly in a professional context**

Digital immigrant (semi-digital)

**functional applications:
e-mail, searching information, LinkedIn**

**High adoption of laptops, smartphones and
(personally owned) tablets**

**Entertainment: still mainly traditional
media (linear TV, radio in the car)**

PROFESSIONAL EXPLORERS – 16.2%





Tablet as main gateway to the internet

High frequency of use of tablet

**Functional applications:
e-mail, browsing for information**

Mobile gaming

**Entertainment: still has to discover
(streaming/downloading, news, SNS)**

PLAYFUL EXPLORERS – 13.5%





Lowest adoption of new media & ICT ('only when necessary')

Oldest segment

Traditional media highly preferred

**linear TV on television set, radio set,
reading the newspaper**

TRADITIONAL MEDIA FANS – 24.9%

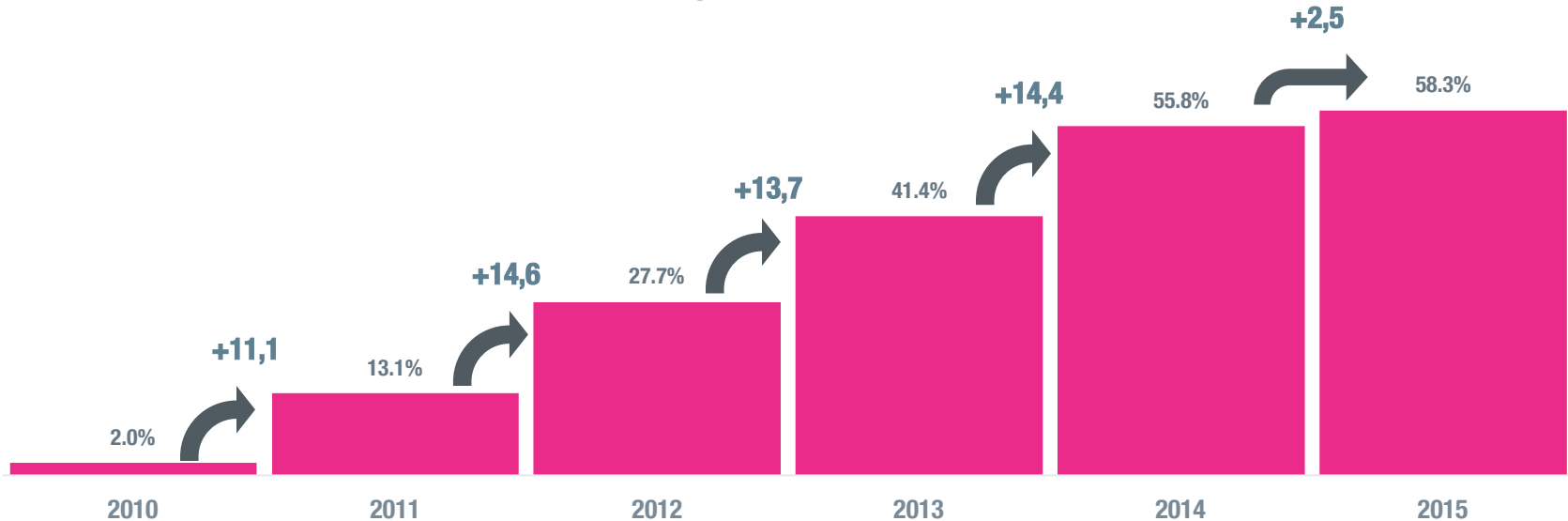




2015 TAKE-AWAYS

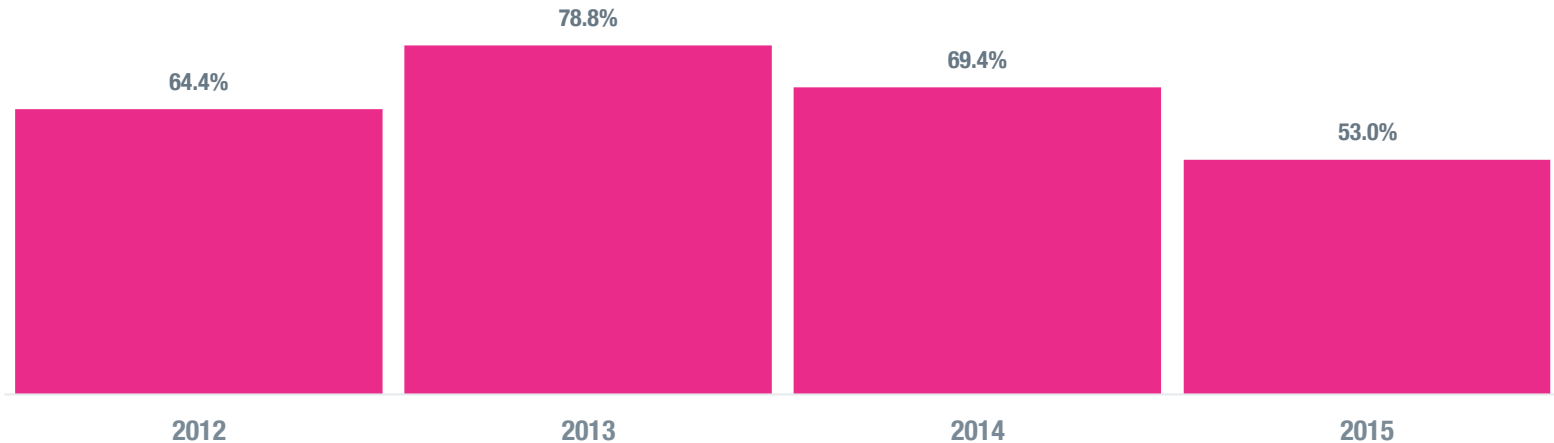
Tablet stagnates – in adoption...

Adoption rate tablets



Tablet stagnates – ... and in use

Daily use of tablet (within tablet owners)



Tablet stagnates – 2 types of users

Young families



Sharing the tablet
Tablet = just one of the many devices
in house, + entertainment

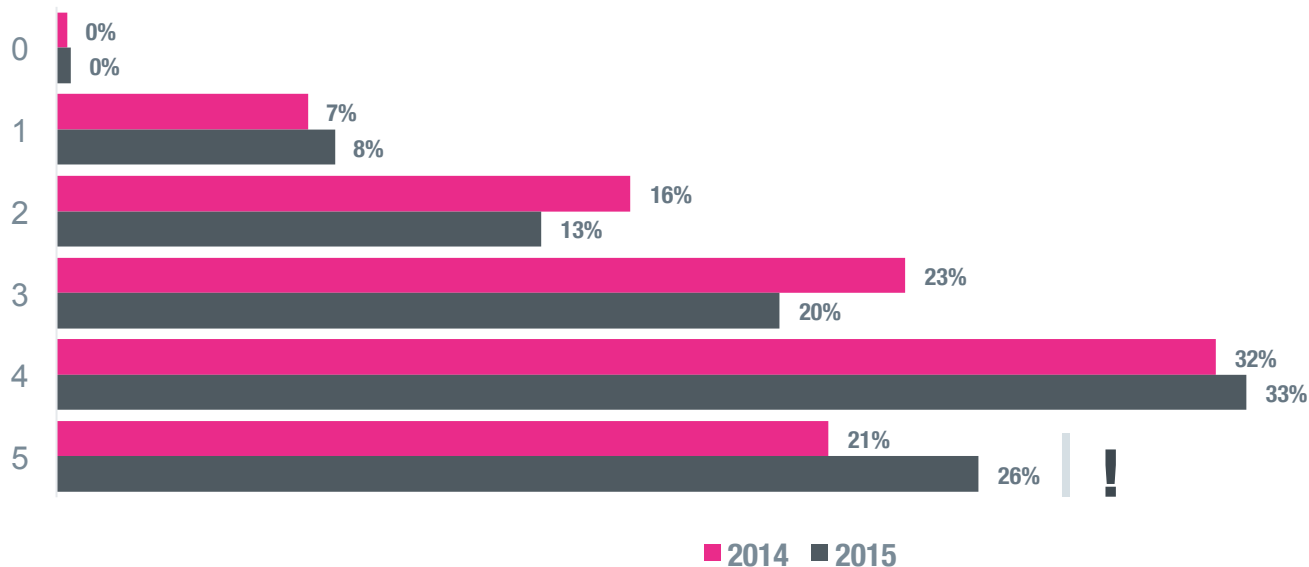
+ 45



Tablet = **personal** possession
Tablet as main gateway to the online world
also outdoor, + functional

More multiscreen households

screens in the household?
(television, desktop, laptop, smartphone or tablet)



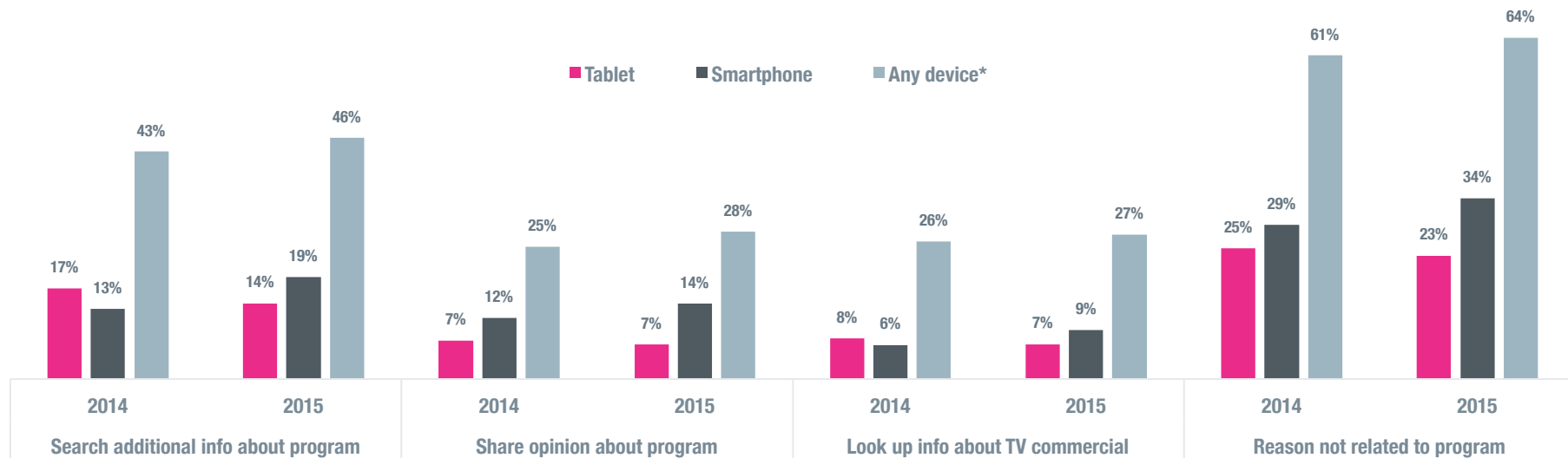
8/10 (78,4%, +1,4) multiscreen (>3) household

6/10 (58,4%, +4,9) >4 screens

7/10 internet on other device during TV



Distraction (64%) vs Interaction (56%)



* Any device = computer, tablet, smartphone, Smart TV or game console

TV: Cumulation vs Cannibalisation?

Over the top = on top

Traditional TV remains stable...

2014

2015



Connection digital TV

86%

86%

Watching TV on TV set (daily basis)

78%

78%

... While new forms are emerging ON TOP

2014

2015

NETFLIX

Netflix

NA

12%

Streaming films/series on computer (monthly basis)

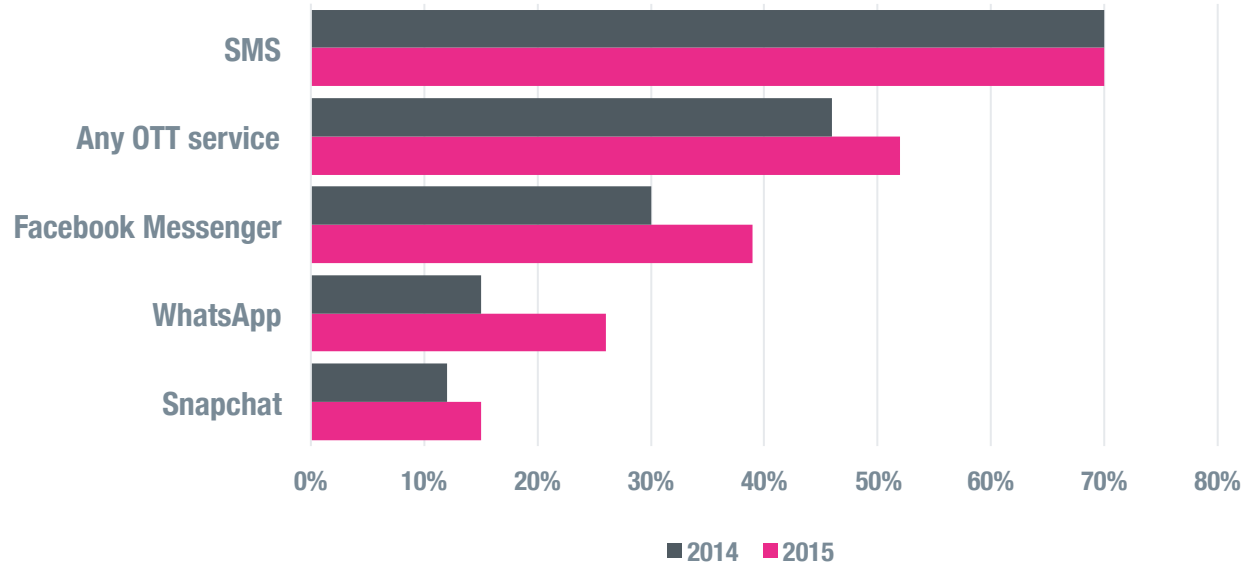
22%

26%

Mobile: Cumulation vs Cannibalisation?

Over the top = on top

Communication services used on daily basis



Mobile: Cumulation vs Cannibalisation?

Over the top = on top

SMS & OTT-messaging on people owning a smartphone

	Smartphone adoption	Sms daily basis	OTT message daily basis	Facebook Messenger daily basis	WhatsApp daily basis	Google Hangouts/ Talk daily basis	Snapchat daily basis
15-19	93,7%	82,1%	88,5%	78,5%	37,0%	7,9%	66,5%
20-29	90,4%	78,5%	75,0%	61,5%	36,4%	7,5%	32,1%
30-39	89,5%	64,4%	58,6%	39,3%	30,6%	6,1%	7,1%
40-49	81,6%	82,1%	49,4%	33,5%	20,6%	3,2%	4,1%
50-59	61,9%	64,7%	33,7%	21,1%	18,5%	2,6%	1,5%
60-64	55,4%	48,3%	22,8%	13,2%	10,5%	2,6%	0,0%
65+	33,2%	53,3%	15,7%	7,1%	11,3%	0,0%	0,0%
Total	68,5%	70,0%	51,8%	39,3%	25,7%	4,7%	15,3%

TRADITIONAL VERSUS WEB-BASED COMMUNICATION

	EVER	MONTHLY	DAILY	EVOLUTION DAILY 2015-2014
Phone call via classic mobile network	93,7%	86,6%	42,6%	-4,3
Phone call via web-based app	56,2%	29,4%	5,0%	+2,4
Text message	98,4%	95,5%	70,0%	-0,1
Facebook Messenger	70,4%	62,0%	39,3%	+9,6
WhatsApp	58,6%	49,3%	25,7%	+10,7
Google Hangout/Talk	19,7%	10,8%	4,7%	+0,5
Snapchat	31,7%	25,5%	15,3%	+2,9
iMessage (iPhone) ⁵	81,3%	70,2%	50,6%	N/A
Any of the enlisted OTT messaging services			51,8%	+5,2

Classic versus web-based communication (on people owning a smartphone, N=1.494)

CLASSIC VERSUS WEB-BASED MESSAGING, BREAKDOWN BY AGE

	SMART- PHONE ADOPTION	DAILY TEXT MESSAGE	OTT MESSAGE DAILY	FACEBOOK MESSENGER DAILY	WHATSAPP DAILY	GOOGLE HANGOUTS/ TALK DAILY	SNAPCHAT DAILY	IMESSAGE DAILY
15-19	93,7%	82,1%	88,5%	78,5%	37,0%	7,9%	66,5%	68,4%
20-29	90,4%	78,5%	75,0%	61,5%	36,4%	7,5%	32,1%	57,2%
30-39	89,5%	64,4%	58,6%	39,3%	30,6%	6,1%	7,1%	49,4%
40-49	81,6%	82,1%	49,4%	33,5%	20,6%	3,2%	4,1%	59,3%
50-59	61,9%	64,7%	33,7%	21,1%	18,5%	2,6%	1,5%	22,8%
60-64	55,4%	48,3%	22,8%	13,2%	10,5%	2,6%	0,0%	15,3%
65+	33,2%	53,3%	15,7%	7,1%	11,3%	0,0%	0,0%	46,8%
TOTAL	68,5%	70,0%	51,8%	39,3%	25,7%	4,7%	15,3%	50,6%

Classic versus web-based messaging, breakdown by age (on people owning a smartphone, N=1.494)

Increasing (mobile) interaction & distraction

> Digibesitas?



"Ik ben Jolien en ik ben verslaafd aan mijn smartphone"

Ergert u zich wel eens aan uw vrienden als ze op hun smartphone dan met u? Enkele Gentse studenten van smartphone-etiquette.

Bekijk de volledige aflevering

HET JOURNAAL 7 - 18/02/15 wo 18/02/2015 -

LOOK UP



2015

1,5% smartphone > basic feature phone

I don't want to be accessible anytime
anywhere (8%)

Aversion (6%)

Privacy infringements (3%)

2,5% abandoned Facebook

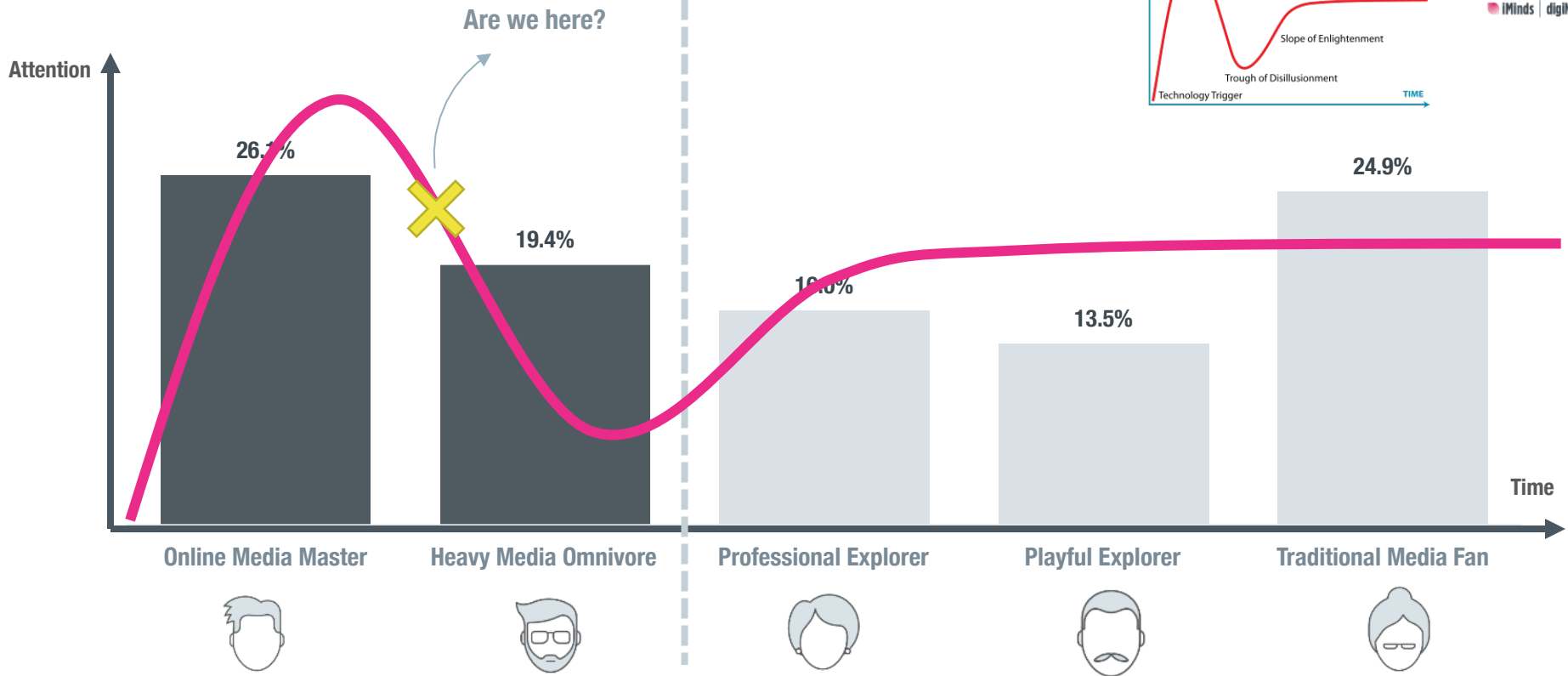
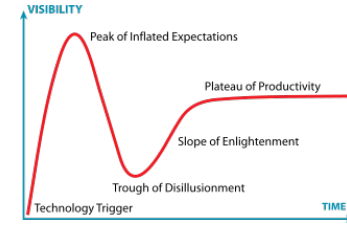
Time consuming (69%)

Privacy issues (41%)

can't pass a day without SNS (25%)



Digibesitas?



2015 TAKE-AWAYS

Smartphone beats tablet

Tablet stagnates

Multiscreen households

Interaction catching up with Distraction

Over The Top = On Top

Digibesitas

Privacy vs Dependency Paradox

THANK YOU FOR YOUR TIME

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