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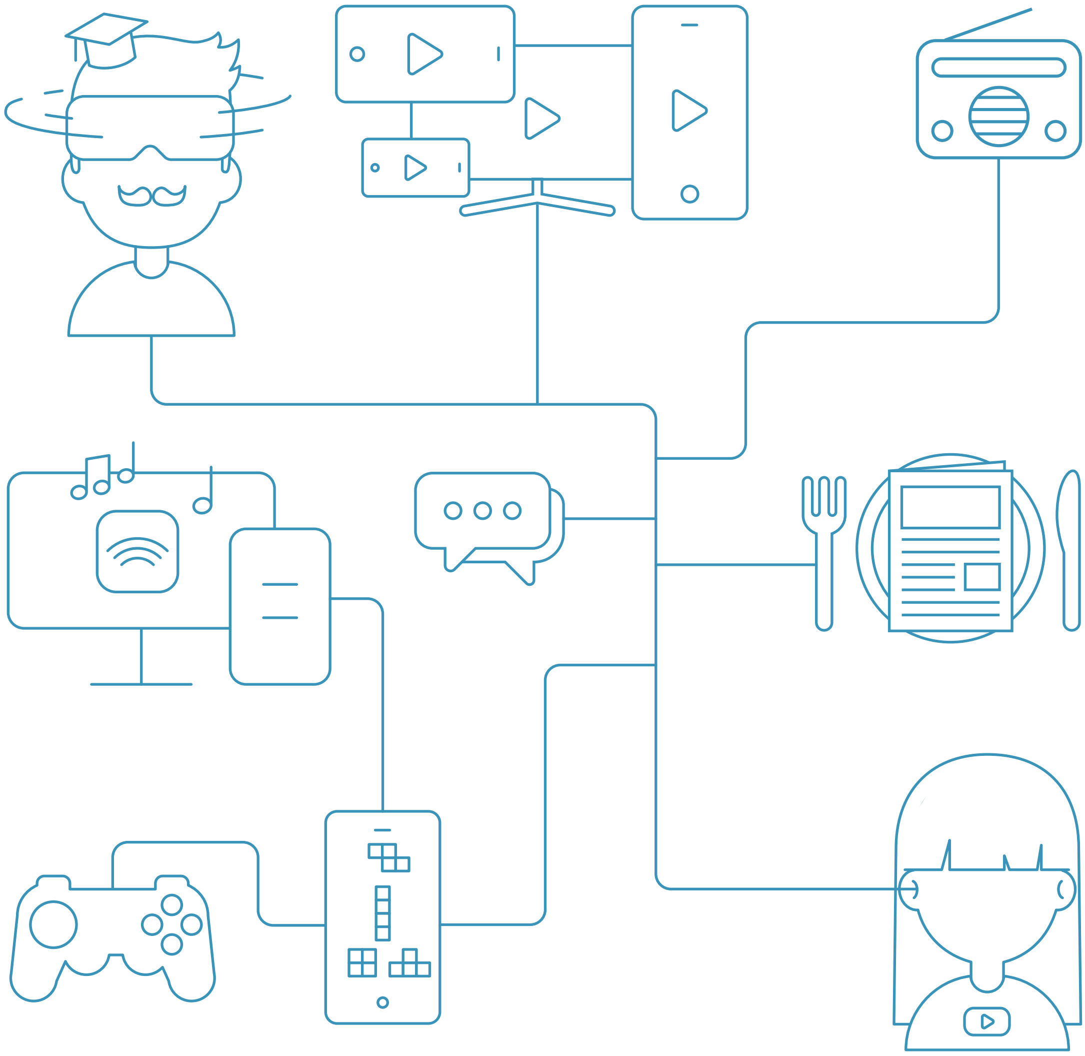
IMEC.DIGIMETER 2017

MEASURING DIGITAL MEDIA TRENDS IN FLANDERS



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PREFACE

Digimeter is a research initiative of imec[1], the world's leading research and innovation hub in nanoelectronics and digital technologies that aims at realizing breakthrough innovations – both in Flanders and the world – in application domains such as smart health(care), smart cities & mobility, smart industries and energy. Striving for economic and societal impact, we feel it is important to have a good understanding of end-user trends and habits.
The primary research goal of imec digimeter is as follows:

> With the digimeter project, imec.livinglabs aims to gather and share data and information about media and ICT usage in Flanders, and to do so systematically and on an annual basis, thereby leveraging a representative methodology. This provides imec researchers with reliable data and insights 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 these data[2]. Because of its annual frequency, imec digimeter also serves as a monitor to detect and keep track of emerging trends and practices.

The second research goal relates to digimeter's detailed profiles:

> By carrying out the digimeter survey on a yearly basis and by including recurring respondents as well as a substantial amount of new people with each wave, the digimeter project allows imec 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 imec.livinglabs). This user database is available to SMEs, organizations and larger companies, for research in collaboration with imec.livinglabs. Management of the digimeter user panel is handled by the user involvement staff of imec.livinglabs[3].

After each digimeter wave, the survey and the data gathering methods are subject 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.

Over the course of 7 weeks in August and September 2017, imec digimeter researchers questioned respondents from all over Flanders through recruitment events in large and small cities. As part of the recruitment exercise, interviewers visited care centers, libraries, public parks, shopping streets, city squares, nursing homes and local pubs.

Recruitment events were set up in Ghent, Antwerp, Kortrijk, Hasselt, Leuven, Genk and Ostend.

The respondents could fill out the survey on tablets during the recruitment events, or take home a paper version and return it free of charge by mail. Explanatory dictionaries were available to clarify unfamiliar terminology (e.g. NAS, Ultra HD TV, CI+, Feedly, ...). At any moment, respondents could also request assistance from our qualified staff.

Paper versions of the imec digimeter survey were displayed in 7 Flemish libraries (Roeselare, Aalst, Vilvoorde, Leuven, Antwerp Nord, Genk & Hasselt) throughout the recruitment period. Respondents could participate by taking a paper version home and return it free of charge by mail, or by filling out a questionnaire at the library and dropping it back into the display.

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).

As a final note, we would like to thank all the respondents who filled out the imec digimeter survey. Without them openly sharing their media and technology practices, creating this report would not have been possible.

1 Until last year, the digimeter research was carried out under the flag of iMinds, the Flemish digital research center and business incubator. As of September 2016, iMinds and imec have joined forces and have merged their activities into one high-tech research and innovation hub for nanoelectronics and digital technologies, under the name imec.

2 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@imec.be).

3 The User Involvement team can be contacted at panel@imec.be

METHODOLOGY

Each year, imec digimeter monitors a representative set of at least 1.500 Flemish inhabitants (aged 15 years or older) on their possession and usage of (new) media and ICT, and their attitudes towards innovation and technology.

- This is the 10th annual edition of the digimeter report since the launch in 2009. The first three waves were set as a biannual survey, but digimeter evolved into an annual study.
- 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 statistics[4]. The total dataset is weighted based on these variables.
- In the period of August to September 2017, 2.345 individuals completed the survey. Responses from 1.323 participants (or 56,4% of the total sample) were collected offline by means of (tablet) computer-assisted personal interviews (516 participants) or paper and pencil interviews (807 participants). 1.022 respondents (or 43,6% of the total sample) filled out the survey online.
- The survey consists of 8 thematic chapters: devices & connections, TV & video, radio & music, news, social media, messaging & communication, gaming and general media. Depending on their answers, respondents are directed to additional questions concerning applications and other information regarding these technologies and media types. In this way, digimeter provides quantitative insights into the adoption and use of (new) media and technology. The survey concludes with a list of socio-demographic questions.
- Just like in previous waves, this report includes a segmentation of the Flemish population. A K-means cluster analysis was performed based on 11 variables measuring the contrast between using traditional media and using digital media, 5 variables indicating the frequency of device use for media consumption and 5 variables on attitudes and opinions on digital media to construct 5 segments.
- Imec digimeter provides a snapshot of the adoption and use of media, ICT and technology. It is based on the self-reporting of media and technology 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 regarding effective media reach.
- The survey investigates the adoption of devices within households: who has access to a device or service within a household? It does not measure personal ownership of a device (except for mobile phones), nor does it make assumptions about household level (how many households own a device or subscription to a service). The latter would imply completely different data gathering and quota sampling methods.
- The evolution regarding 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 would represent 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 in value. The total amount of all vouchers combined was €2.000.

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

GENERAL ADOPTION

MEDIA & ICT ADOPTION IN FLANDERS - 2009 TO 2017

The general trends in media and ICT adoption that have characterized the last few years seem to continue in 2017. In a landscape distinguished by the sluggish adoption of media and ICT devices, the smartphone continues to gain users at a quick pace (77,7%, +3,8 percentage points). Fueled by the increased awareness of health applications, smart wearables are quickly gaining traction in Flanders. 18,6% (+5,4 percentage points) of the Flemish population claims ownership of a smart wearable, with smart sports watches and fitness trackers/smart wristbands being the most popular type of smart wearable (surpassing smartwatches).

The adoption of computers remains stable, with 90,6% of the Flemish population having access to a laptop and/or desktop computer within their households. The gap between portable and desktop computers in terms of adoption is still widening: while the adoption of laptop computers fluctuates at around 80% of the Flemish population since 2012, we see that fewer and fewer Flemings have a desktop computer at home (41,8%, again a decline of 2,4 percentage points compared to last year).

As in previous years, 1 in 3 Flemings claim to have access to a game console (35,0%, -0,3 percentage points). The fixed game console (which is connected to a TV screen) is by far the most popular type of console (32,2%). 1 in 6 Flemings have a portable game console such as Nintendo DS or PlayStation Vita (14,6%). Nintendo Switch, the first hybrid portable-fixed game console, was launched on March 3rd, 2017. Five months after launch, 2,0% of the Flemish population claims to own such a console (see Devices chapter for more details).

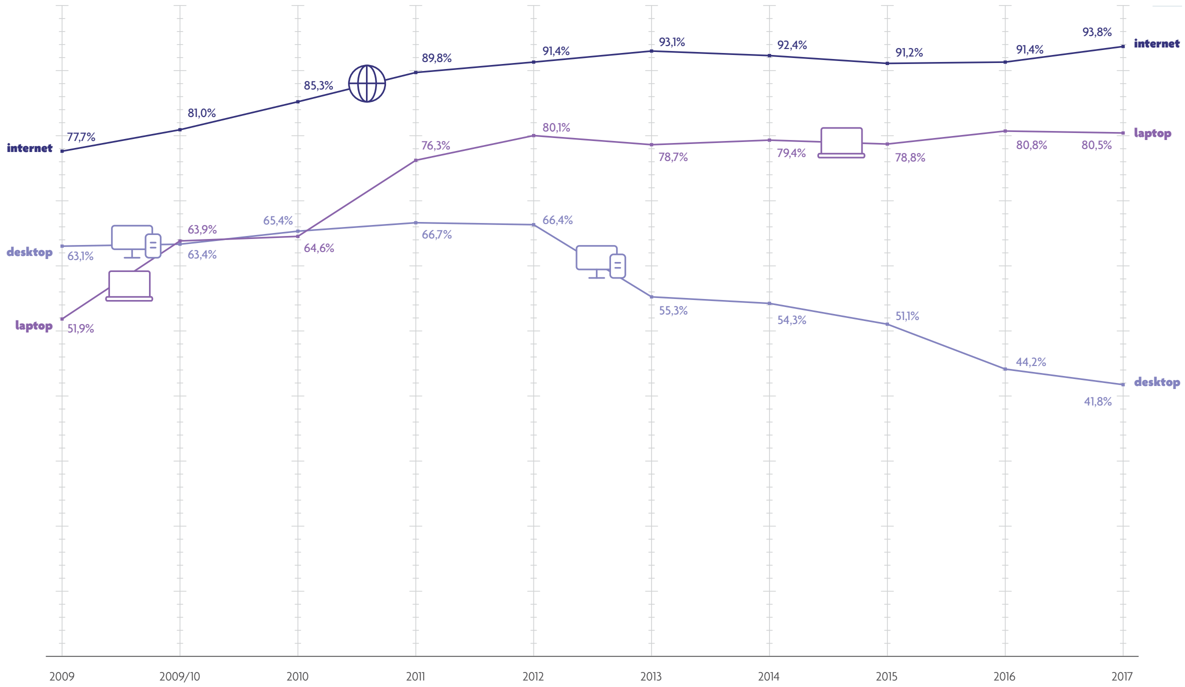
In 2015, we saw the double-digit growth of tablet adoption come to a stop for the first time. Since then, we have observed little change in this trend. With 6 in 10 Flemings having access to a tablet within their household (60,0%), the adoption of tablets did not change significantly compared to last year (+1,4 percentage points).

This is in stark contrast to the ever-increasing adoption of smartphones in Flanders. Today, over 3 in 4 Flemings have a smartphone (77,7%), a significant increase compared to last year (+3,8 percentage points). The discrepancy between the adoption of 'regular' mobile phones (GSMs) vs. smartphones has expanded continuously since 2014. Less than a third of the Flemish population still has a GSM at their disposal (31,3%), which is a significant drop compared to last year (-4,5 percentage points). The adoption of landline telephone connections remains stable, with about 2 out of 3 Flemings (64,6%, -2,2 percentage points) claiming one.

The market of smart wearables is quickly gaining ground in Flanders. Just like last year, we do see significant growth (+5,4 percentage points), with 18,6% of the Flemish population having one or more types of smart wearables at their disposal. This growth is clearly fueled by fitness and health-related motivations (tracking movement, sleeping patterns, and physiological parameters such as heart rate). This is why the most common types of smart wearables are designed for those health tracking purposes, such as a smart sports watches (7,3%) and smart wristbands (also called 'activity trackers') (6,4%). Smartwatches that also support other functions such as communication apps (e.g. sending/receiving messages), agenda reminders and display notifications from news apps come in at third place (5,8%).

The adoption of television screens remains stable at well over 9 in 10 Flemings (94,4%, -2,1 percentage points). The vast majority of the Flemish population has a flat screen TV at home (86,9%). Just like last year, 4 in 10 Flemings claim to have a smart TV (41,9%, +2,3). The number of Flemings who only have a classic tube TV at home seems to have reached a low. For the third year in a row, merely 7% to 9% claim to only have a classic tube TV (7,5%, +0,1). Three years ago, this figure was 13,6%.

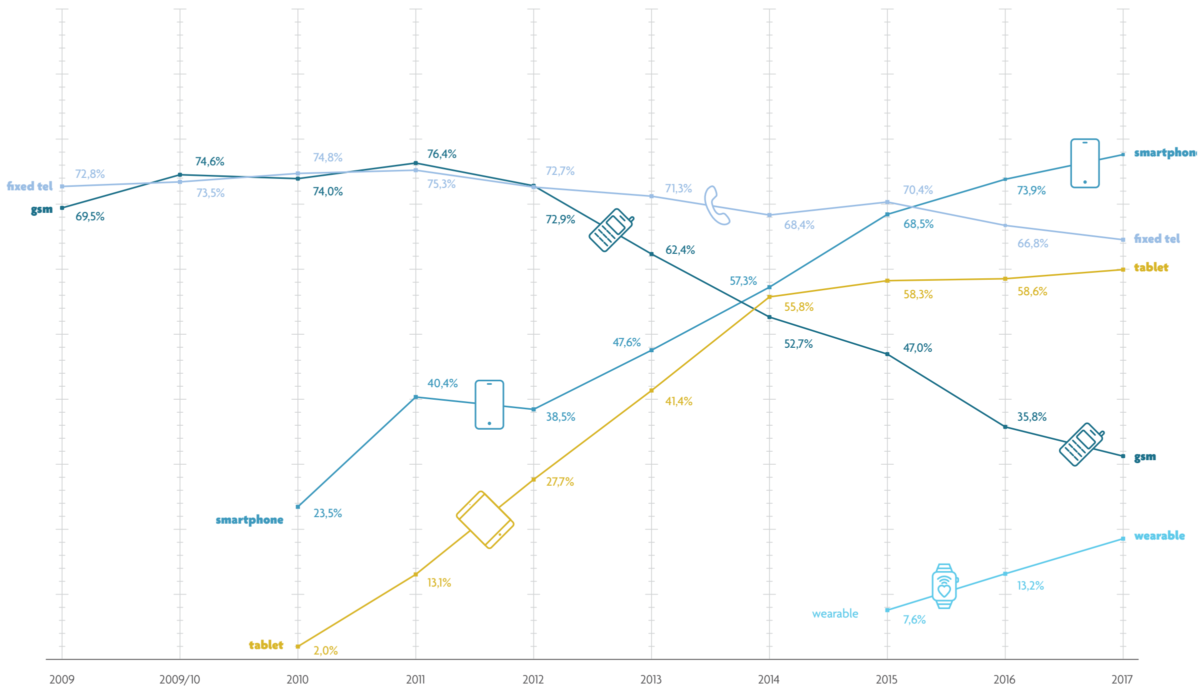
PROPORTION OF FLEMISH PEOPLE WITH ACCESS TO INTERNET & COMPUTER IN THEIR HOUSEHOLD



General adoption graph 1: Adoption of internet connection & computers in Flanders – 2009 to 2017

* Statistically significant change compared to the previous year, based on a chi-square test.

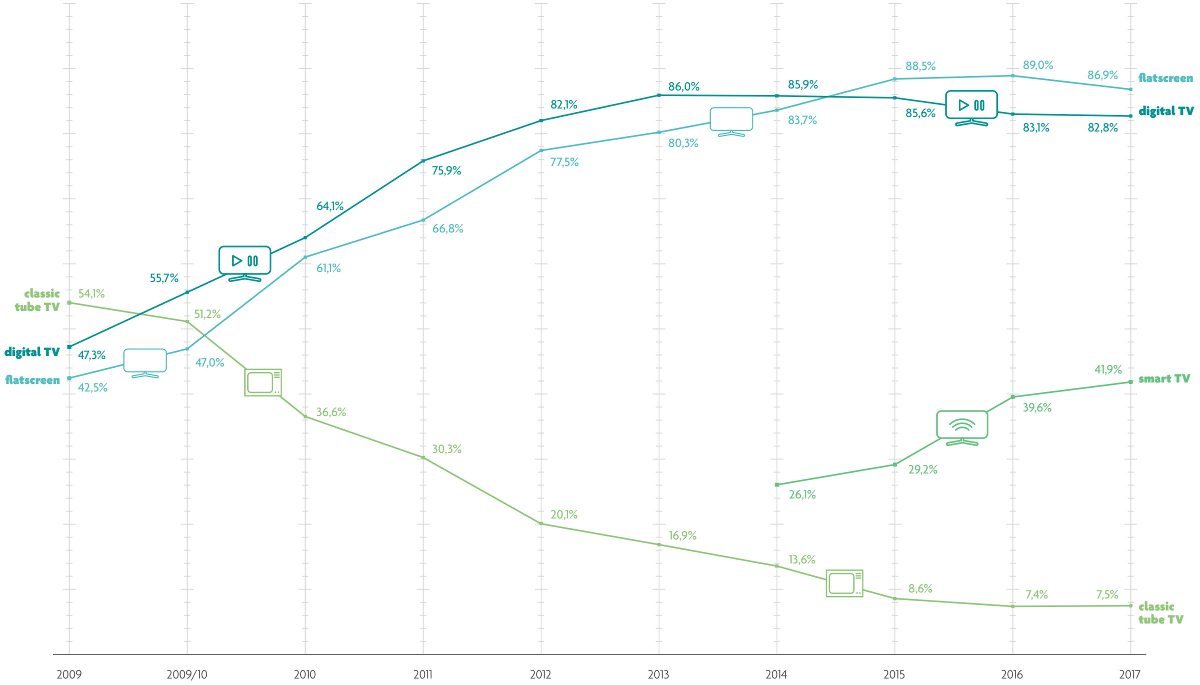
PROPORTION OF FLEMISH PEOPLE WITH ACCESS TO TELEPHONY & MOBILE IN THEIR HOUSEHOLD



General adoption graph 2: Adoption of telephony & mobile in Flanders – 2009 to 2017

* Statistically significant change compared to the previous year, based on a chi-square test.

PROPORTION OF FLEMISH PEOPLE WITH ACCESS TO TV SET & DIGITAL TV SUBSCRIPTION IN THEIR HOUSEHOLD



General adoption graph 3: Adoption of TV sets & digital TV subscriptions in Flanders – 2009 to 2017

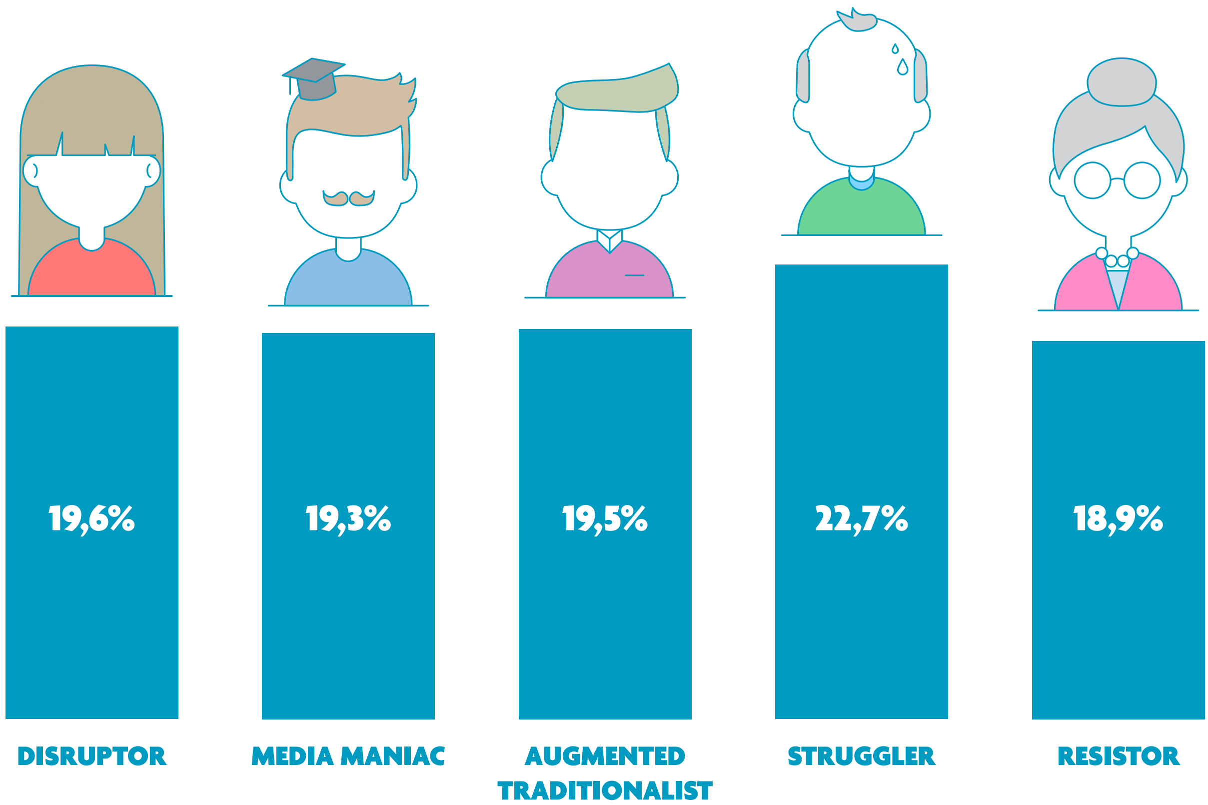
PROPORTION OF FLEMISH PEOPLE WITH ACCESS TO GAME CONSOLE IN THEIR HOUSEHOLD

General adoption graph 4: Adoption of game consoles in Flanders – 2009 to 2017

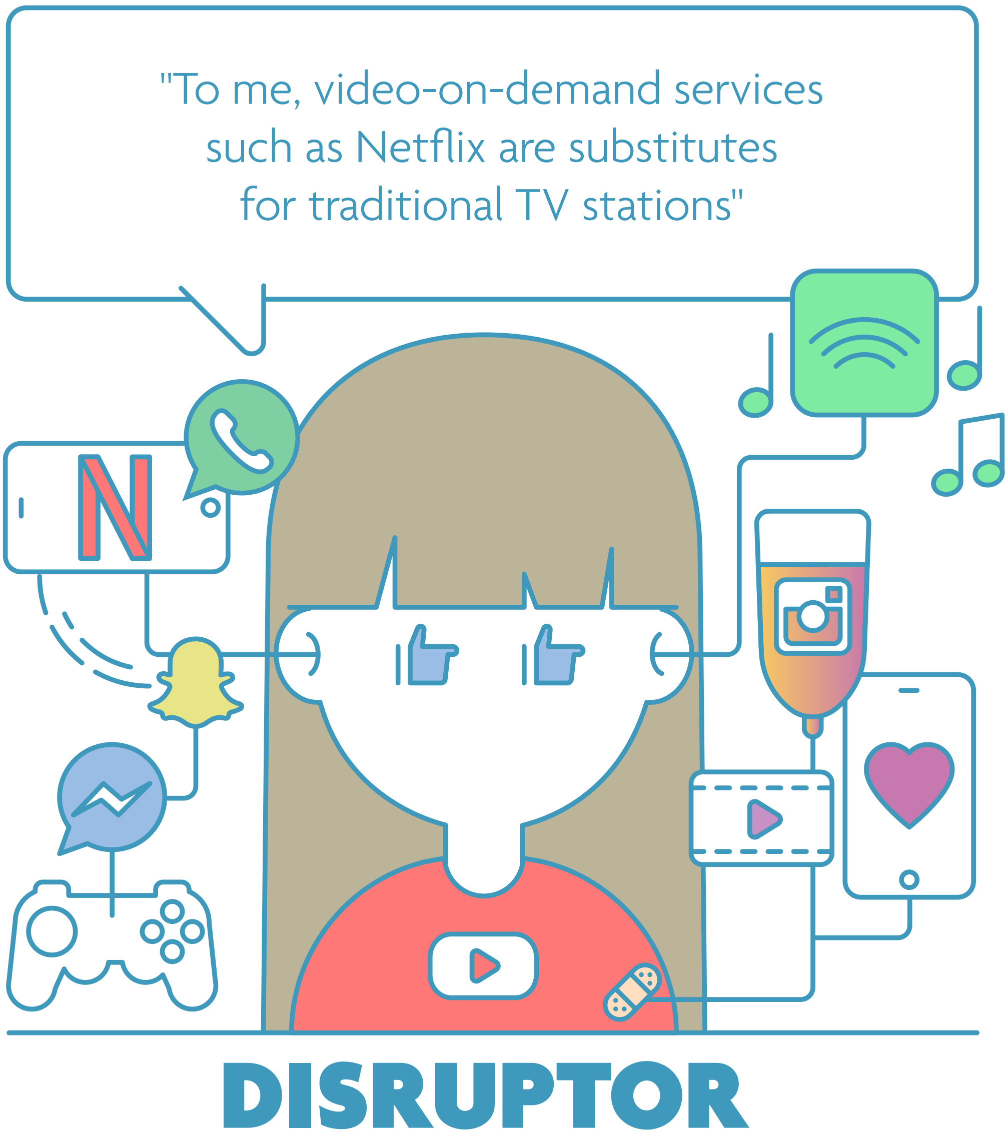
PROFILES

As in previous years, we have grouped Flemish media and technology consumers into segments. As the mere adoption of digital media and technology in Flanders has become less and less of a differentiator between segments, we rely more and more on the use of and the attitude towards (digital) media and technology to segment the Flemish population into profiles. All segments are digital to some extent, but they differ on how often they use digital media, which role it plays in their everyday lives, and how it relates to more traditional forms of media. In practical terms: instead of merely focusing on variety and frequency of media use like the previous years, we based this year's segmentation on the contrast between using traditional and digital media, the frequency of using media devices, and the attitudes and opinions towards the impact of digital innovation.

As a result, comparisons between the 5 segments of this digimeter report with the 4 segments of the previous report should be considered with caution. Some rough parallels are possible, as will be made clear in the introductions to the segments below.



DISRUPTOR (19,6%)

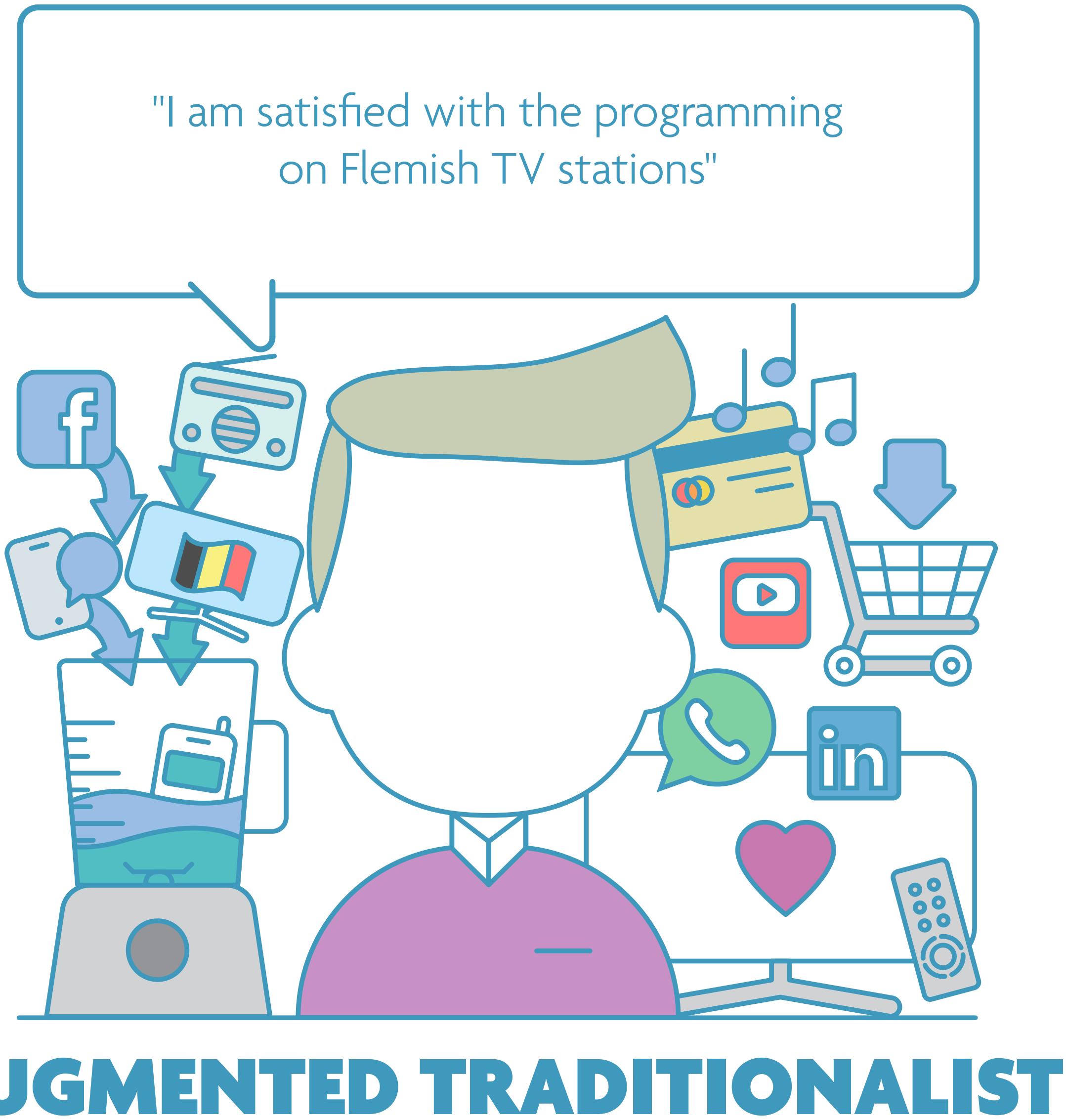


Disruptors account for a fifth of the population (19,6%). This is the youngest segment, as Flemings in their teens, twenties and thirties are prominently present in this segment. For Disruptors, digital media have largely replaced more traditional forms of media. This segment watches online videos more frequently than TV broadcasting, and prefers streaming music online over listening to the radio or a CD. Compared to other segments, Disruptors rely less on phone calls, email and SMS for their everyday communication. Instead, they are frequent users of messaging apps like Facebook Messenger, WhatsApp and Snapchat. Social networks such as Facebook, YouTube and Instagram remain popular among Disruptors. The smartphone is the central device for this segment, both in terms of adoption rate and use frequency, with the laptop as a popular companion device.

MEDIA MANIAC (19,3%)

Media Maniacs are slightly older than Disruptors (while the age of Disruptors seems to be clustered around Flemings in their twenties, Media Maniacs seem to be clustered around Flemings in their thirties). Most commonly, they live together with their partners (with or without children). They are highly educated and have established their professional careers. This segment, can be related to the Cumulators of last year, blends the use of digital media and technology with the use of more traditional forms of media. They are as likely to watch online videos as they are to watch traditional live TV programming. They regularly listen to radio broadcasting, but are also frequent users of online music streaming platforms. What is really typical of this segment is that all these types of media are consumed at a high pace. Digital media has become omnipresent in the lives of Media Maniacs, and constitutes a rich layer on top of more traditional media formats. Although they do blend both digital and traditional media touchpoints, it is the high prevalence of digital media that is particularly striking. It may come as no surprise that this segment seems to experience the highest level of social media and smartphone dependency and agree the most that digital media has invaded their personal lives.

AUGMENTED TRADITIONALIST (19,5%)



Augmented Traditionalists can be regarded as the more traditional (and slightly older) sibling of Media Maniacs. This segment is related to both Cumulators and Strugglers of last year. They consider traditional media formats the cornerstone of their media consumption, but enrich this with a layer of digital consumption. Digital media are less strongly present in the media lives of Augmented Traditionalists compared to the Media Maniacs, but still constitute an important aspect of their lives. Just as with the Strugglers, traditional media still constitute the foundation of their media diet. But in contrast to Strugglers, Augmented Traditionalists do feel comfortable using digital media, and do feel themselves capable and skilled enough to master the use of digital media.

Disruptors, Media Maniacs and Augmented Traditionalists (combined, they account for 58,4% of the Flemish population) are segments that are experienced with the use of digital media and technology. Disruptors mainly see digital media as replacing traditional forms of media, while Media Maniacs and Augmented Traditionalists tend to stack digital media consumption on top of the traditional forms they still use. These segments don't struggle with the technology and digital media as such, but rather struggle with themselves: how can they incorporate the use of digital technology into their personal lives without feeling too dependent on these digital impulses?

The next segments have no digital habits (yet), and are mainly focused on using traditional forms of media.

STRUGGLER (22,7%)

Strugglers still mainly consume traditional forms of media. Compared to last year, this segment experienced an influx of former Resistors, who have become more positive about and less reluctant towards the use of digital media. Strugglers want to explore the possibilities of digital media and technology, but often lack the skills and the experience to really develop digital media habits. They are familiar with using social media, but have concerns about the impact on their online privacy. They are exploring online platforms for video and music, but still have a persistent habit of watching live TV programming and listening to radio broadcasting on a daily basis.

RESISTOR (18,9%)

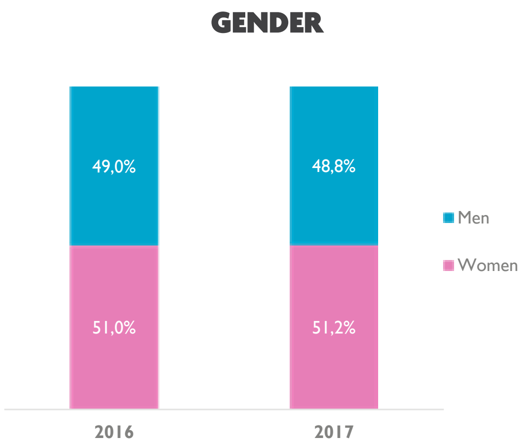
Stability is a key characteristic of the media behavior of Resistors, as innovations are only slowly accepted by this segment. They are the most stubborn in the face of the temptation of digital media, and mainly stick to traditional forms of media and technology. This is illustrated by the low adoption and use rate of internet connections, smartphones, computers and tablets. This segment is the least interested in using digital media and technologies, and is the most skeptical about the beneficial influences that using digital media may have. This segment experienced a substantial migration towards Strugglers, as some former Resistors have developed more positive attitudes towards digital media.

SOCIO-DEMOGRAPHICS

The analyses in this report are based on a representative sample of the Flemish population. During the fieldwork, quotas were set for age, gender, education level and province. After data cleaning was performed, the final dataset was weighted according to these variables.

GENDER

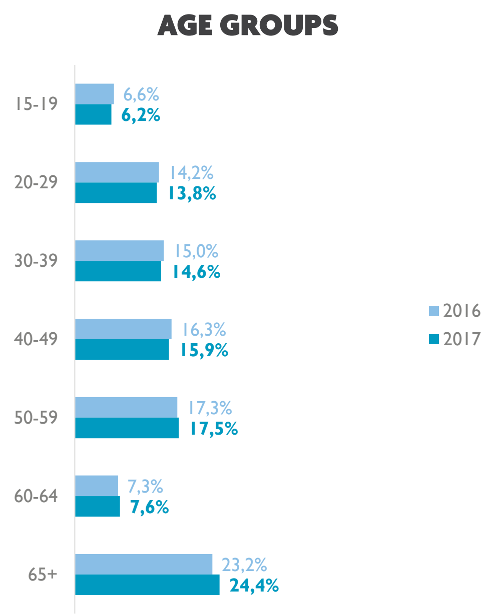
Just like last year, and in accordance tot the distribution in the Flemish population, our sample consists of slightly more women (51,2%) than men (48,8%).



Socio-demographic graph 1: Population plotted by gender (N=2.345)

AGE GROUPS

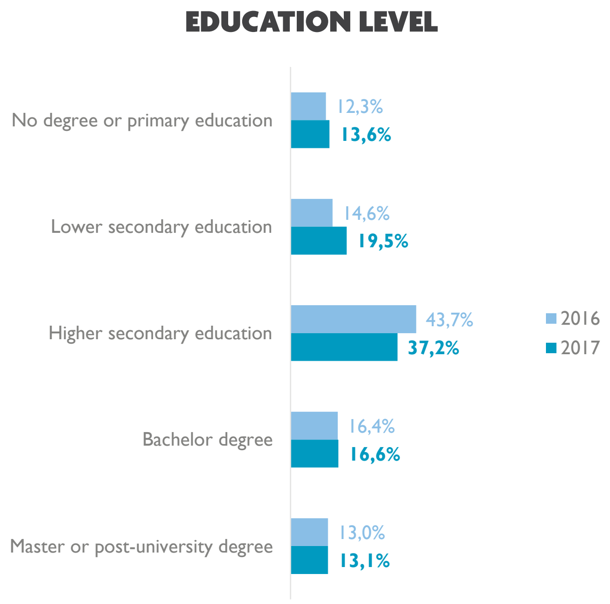
The minimum age to participate in the survey is 15 years old. The sample has been set up according to the age distribution within the Flemish population (based on figures provided by the FPS Economy).



Socio-demographic graph 2: Population plotted by age groups (N=2.345)

EDUCATION LEVEL

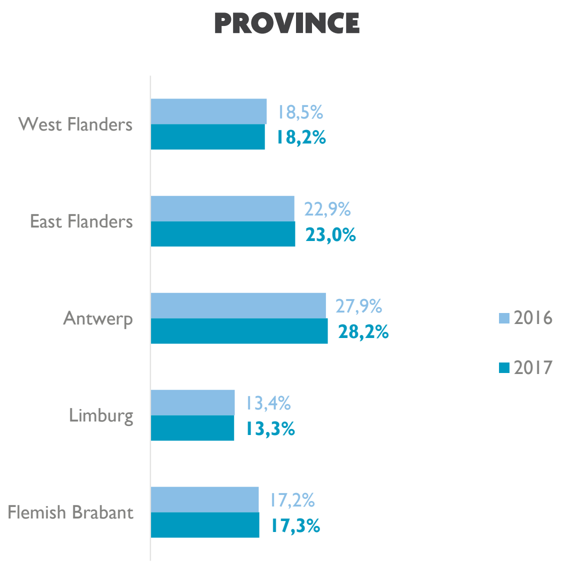
29,7% have a higher degree (16,6% bachelor; 13,1% master or postgraduate degree); 13,6% completed only primary education or hold no degree at all.



Socio-demographic graph 3: Population plotted by education level (N=2.345)

PROVINCE

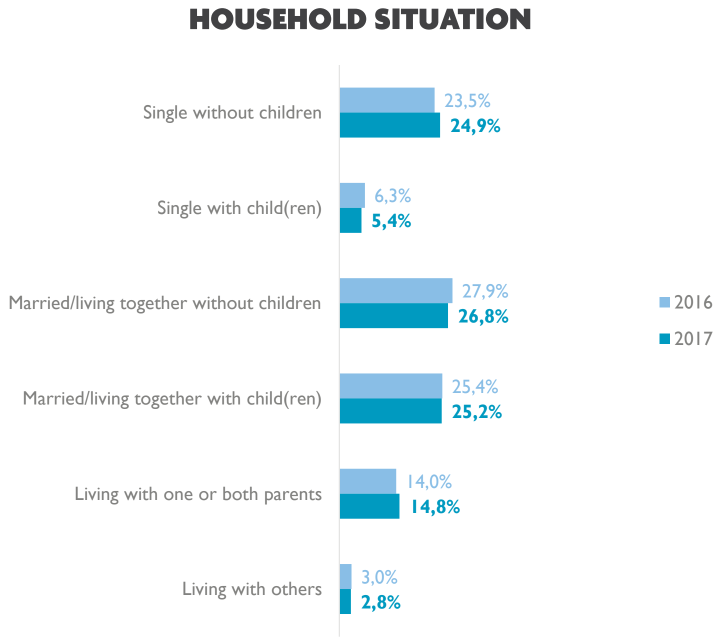
Conforming to the distribution within the total Flemish population (aged 15+), half of the respondents in the sample reside in the provinces of Antwerp (28,2%) or East Flanders (23,0%).



Socio-demographic graph 4: Population plotted by province (N=2.345)

HOUSEHOLD SITUATION

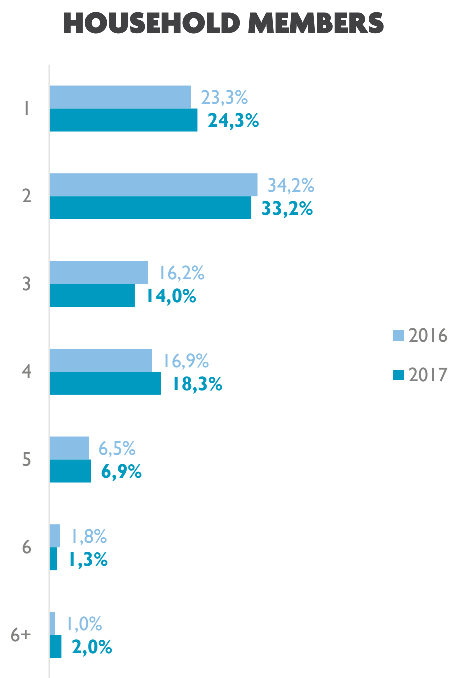
Over half of our sample is married or living together with their partner (26,8% without children, 25,2% with children). The third largest group in the sample is composed of single individuals without children (24,9%).



Socio-demographic graph 5: Population plotted by household situation (N=2.345)

HOUSEHOLD MEMBERS

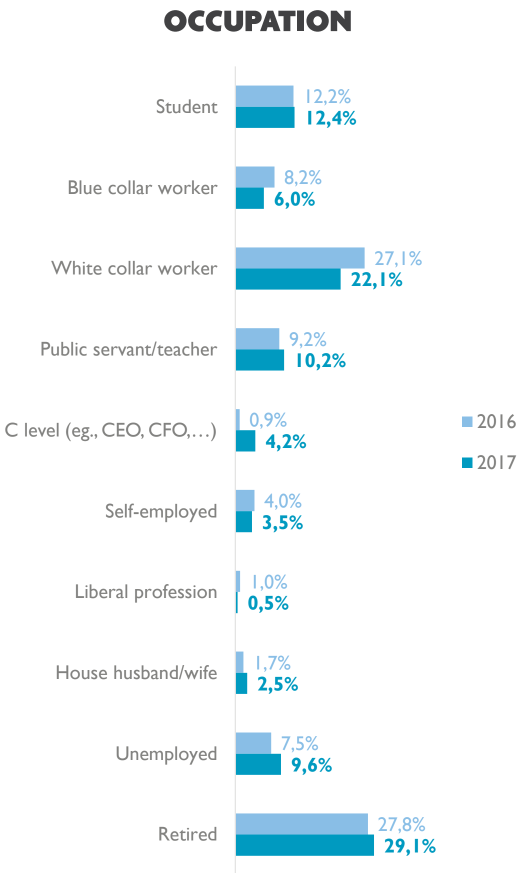
Households consisting of 2 individuals are the most common household constellation in our sample (33,2%). 24,3% of the respondents live on their own, while 28,5% live in households of at least 4 people.



Socio-demographic graph 6: Population plotted by number of household members (N=2.345)

OCCUPATION

The majority of the sample is either retired (29,1%) or working in a white-collar profession (22,1%). 12,4% are students.

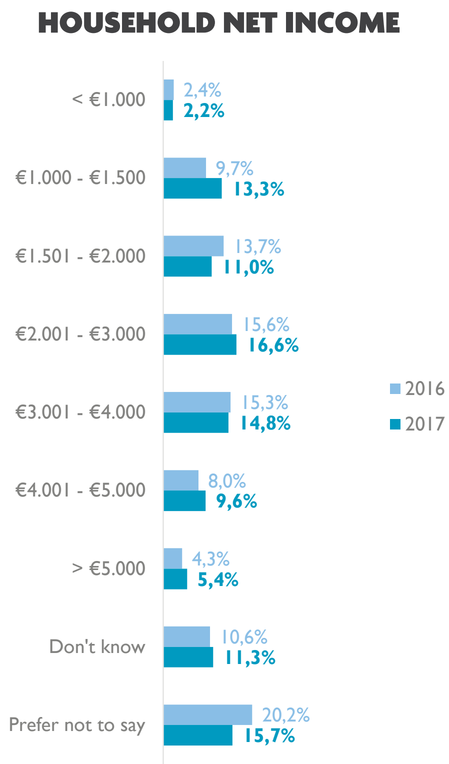


Socio-demographic graph 7: Population plotted by occupation (N=2.345)

HOUSEHOLD NET INCOME

Household net income is distributed normally, with the highest share of the sample (42,4%) having an income between €1.500 and €4.000. 2,2% has a family income of less than €1.000, 5,4% have a net income exceeding €5.000.

Remarkably, a large proportion of the sample does not know what the net income of their family is (11,3%), or prefers not to report their household net income (15,7%).



Socio-demographic graph 8: Population plotted by net household income (N=2.345)

DIGIMETER PROFILES

SOCIO-DEMOGRAPHIC

DISRUPTOR (19,6%)

The Disruptor is the youngest profile. 64% of Disruptors are between 15 and 39 years old, compared to 35% within the total population. Disruptors have the highest share of students among them (27%, compared to 12% within the total population). They tend to live with their parents (27%, compared to 15% within the total population).

MEDIA MANIAC (19,3%)

In general, Media Maniacs tend to be slightly older than Disruptors. 77% of Media Maniacs are between 20 and 49 years old, compared to 66% among Disruptors, and 44% within the total population. Most commonly, they live together with their partners and children (35%) or with their parents (29%). Typical for this segment is the large number of highly educated people (42% have a bachelor or a master's degree, compared to 30% in the total population). Moreover, they tend to have higher household incomes compared to other segments (47% earn at least €3.000 per month, whereas this figure is 30% within the total population).

AUGMENTED TRADITIONALIST (19,5%)

Augmented Traditionalists are slightly older than Media Maniacs. 40% of this segment is between 40 and 59 years old, compared to 34% among Media Maniacs and 33% within the total population. They tend to live together with their partners (58%), with (31%) or without (27%) children. Compared to the total population, Augmented Traditionalists are more likely to be white collar workers (30%, compared to 22% in the total population), public servants or teachers (13%, compared to 10% in the total population). Augmented Traditionalists count less highly educated people (holding a bachelor or master's degree) (37%) compared to the segment of Media Maniacs (42%), but education level is still well above the average in the Flemish population (30%).

STRUGGLER (22,7%)

Strugglers are most commonly aged 50 years and older (80%, compared to 50% within the total population). They tend to live together with their partners without children (42%). 31% of the Strugglers hold a bachelor or master's degree, which is at par with the total population (30%). Almost half of Strugglers are retired (49%, compared to 29% in the total population).

RESISTORS (18,9%)

The Resistor is by far the oldest segment, with 61% being at least 65 years old (compared to 24% within the total population). They most commonly live in small households, either as a single without children at home (50%) or living together with their partners without children at home (27%). They tend to be less educated, as only 7% hold a bachelor or master's degree (compared to 29% within the total population). It may come as no surprise that this segment also counts the highest number of retired people (65%, compared to 29% within the total population).

Gender

	Men	Women
Disruptor	52%	48%
Media Maniac	57%	43%
Augmented Traditionalist	47%	53%
Struggler	50%	50%
Resistor	38%	62%

Age

	15-19	20-29	30-39	40-49	50-59	60-64	65+
Disruptor	13%	26%	25%	15%	13%	4%	4%
Media Maniac	11%	28%	24%	25%	9%	2%	1%
Augmented Traditionalist	5%	14%	19%	19%	21%	6%	16%
Struggler	1%	1%	4%	14%	27%	15%	39%
Resistor	2%	2%	2%	7%	16%	11%	61%

Household situation

	Single without children	Single with child(ren)	Married/ living together without children	Married/ living together with children	Living with one or both parents	Living with others
Disruptor	21%	5%	18%	25%	27%	5%
Media Maniac	11%	5%	17%	35%	29%	3%
Augmented Traditionalist	18%	7%	27%	31%	14%	3%
Struggler	25%	4%	42%	25%	2%	2%
Resistor	50%	7%	27%	10%	3%	2%

Household members

	1	2	3	4	5	6	More than 6
Disruptor	18%	22%	17%	27%	10%	3%	4%
Media Maniac	11%	24%	17%	32%	12%	2%	3%
Augmented Traditionalist	19%	32%	19%	19%	7%	2%	1%
Struggler	25%	48%	10%	12%	4%	0%	1%
Resistor	49%	38%	7%	3%	2%	0%	2%

Occupation

	Student	White collar worker	Blue collar worker	Public servant/ teacher	C level
Disruptor	27%	27%	5%	10%	3%
Media Maniac	24%	32%	5%	14%	8%
Augmented Traditionalist	10%	30%	8%	13%	5%
Struggler	1%	16%	6%	11%	4%
Resistor	2%	6%	6%	2%	1%

Occupation (continuation of table above)

	Self-employed	Liberal profession	Houseman/-wife	Unemployed	Retired
Disruptor	5%	1%	2%	14%	5%
Media Maniac	6%	0%	1%	8%	3%
Augmented Traditionalist	3%	1%	1%	8%	21%
Struggler	3%	1%	5%	4%	49%
Resistor	1%	0%	3%	15%	65%

Education level

	No degree or primary education	Lower secundary	Higher secundary	Bachelor	Master
Disruptor	6%	19%	44%	16%	16%
Media Maniac	2%	16%	41%	22%	20%
Augmented Traditionalist	9%	14%	40%	22%	15%
Struggler	11%	20%	39%	18%	12%
Resistor	42%	29%	23%	5%	2%

Net income

	€ 1.500 or less	€ 1.501 - € 3.000	More than € 3.000	Don't know	Prefer not to say
Disruptor	15%	27%	29%	18%	11%
Media Maniac	6%	21%	47%	16%	10%
Augmented Traditionalist	11%	31%	32%	12%	14%
Struggler	10%	33%	34%	4%	20%
Resistor	37%	25%	7%	8%	24%

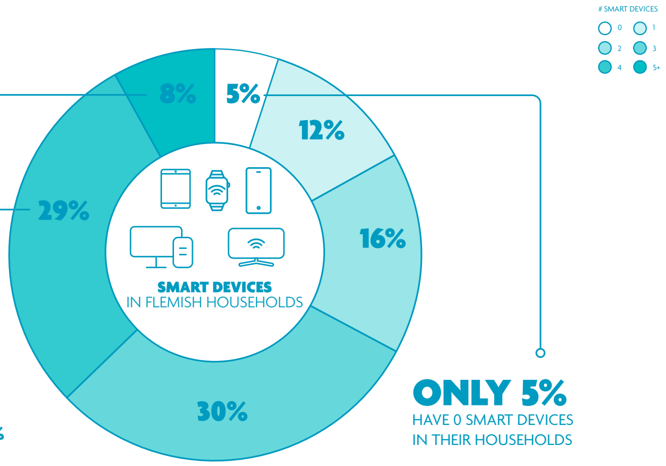
CHAPTER 01

DEVICES & CONNECTIONS

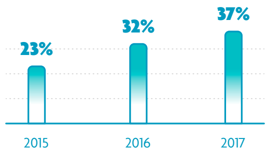
IMEC.DIGIMETER INFOGRAPHIC

DEVICES & CONNECTIONS

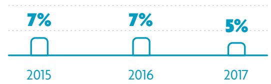
Flemings increasingly hooked on smartphones and Netflix



37%
HAVE 4 OR MORE SMART DEVICES IN THEIR HOUSEHOLDS

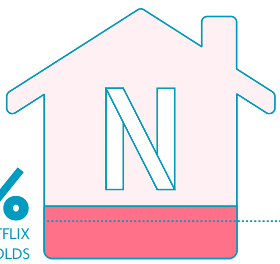


ONLY 5%
HAVE 0 SMART DEVICES IN THEIR HOUSEHOLDS



GROWTH OF NETFLIX

DON'T HAVE NETFLIX · HAVE NETFLIX IN 2016 · HAVE NETFLIX IN 2017



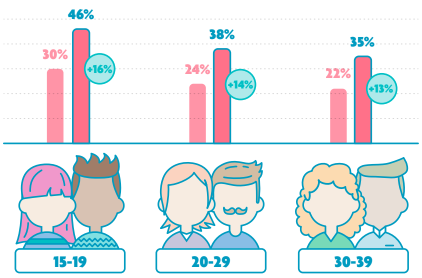
21%
HAVE ACCESS TO NETFLIX IN THEIR HOUSEHOLDS

+6%
COMPARED TO 2016

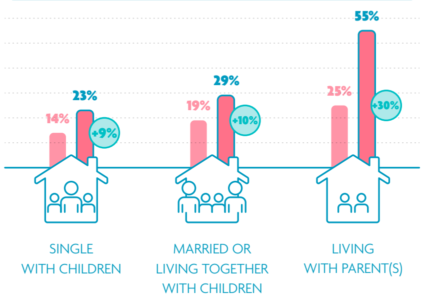
GROWTH
IS MOSTLY SITUATED AMONG

PEOPLE UNDER 40	+14%
HOUSEHOLDS WITH CHILDREN	+9%
DIGITAL TV SUBSCRIBERS	+7%

YOUNGEST AGE SEGMENTS HAVE THE HIGHEST NETFLIX GROWTH

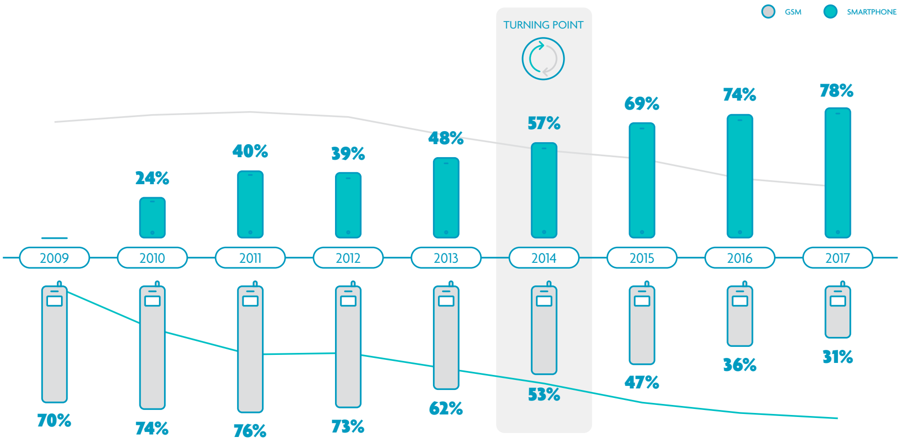


HOUSEHOLDS WITH THE HIGHEST NETFLIX GROWTH



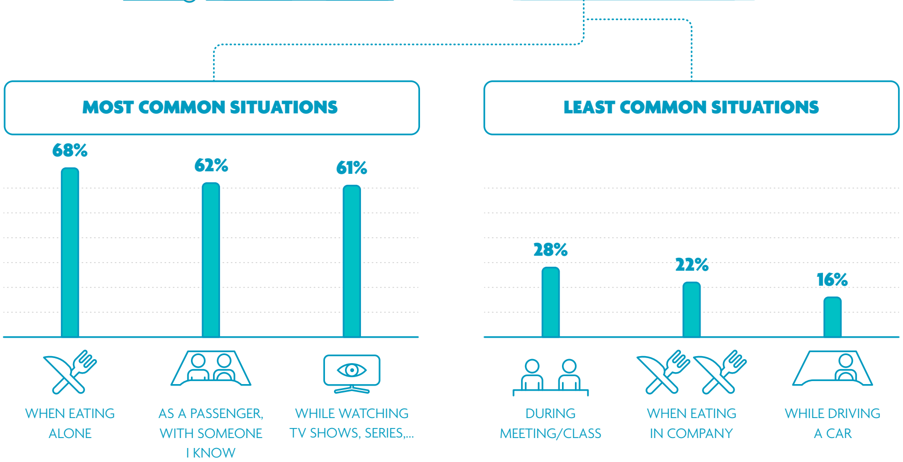
SMARTPHONES VS. GSM

Gap between smartphone adoption vs. GSM adoption keeps expanding



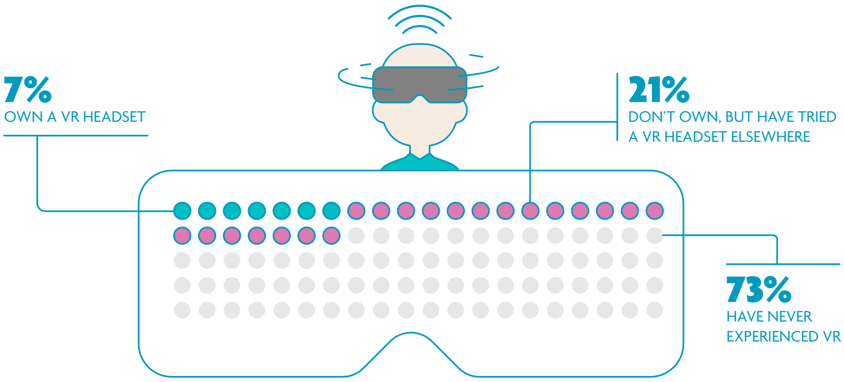
MULTITASKING

Most Flemings claim to multitask



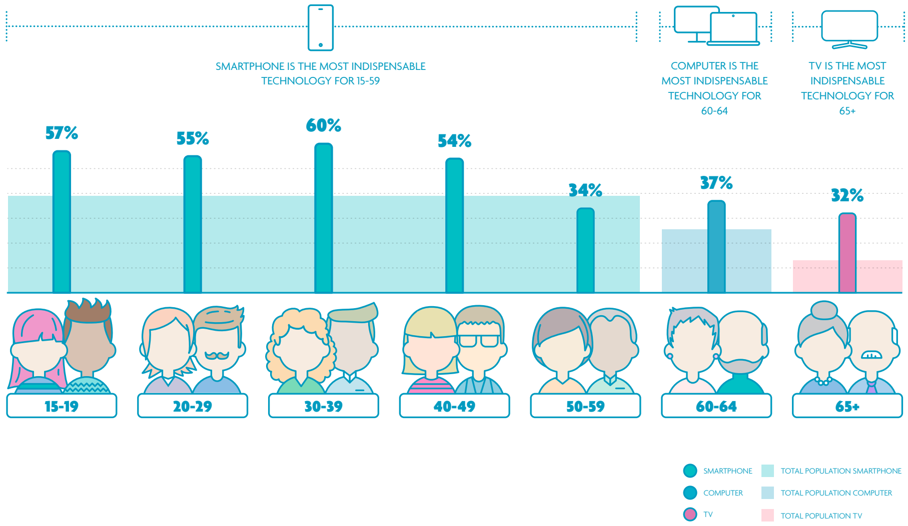
VIRTUAL REALITY

Most Flemings have no experience with VR



MOST INDISPENSABLE TECHNOLOGY

The smartphone is the most indispensable technology for Flemings under 60



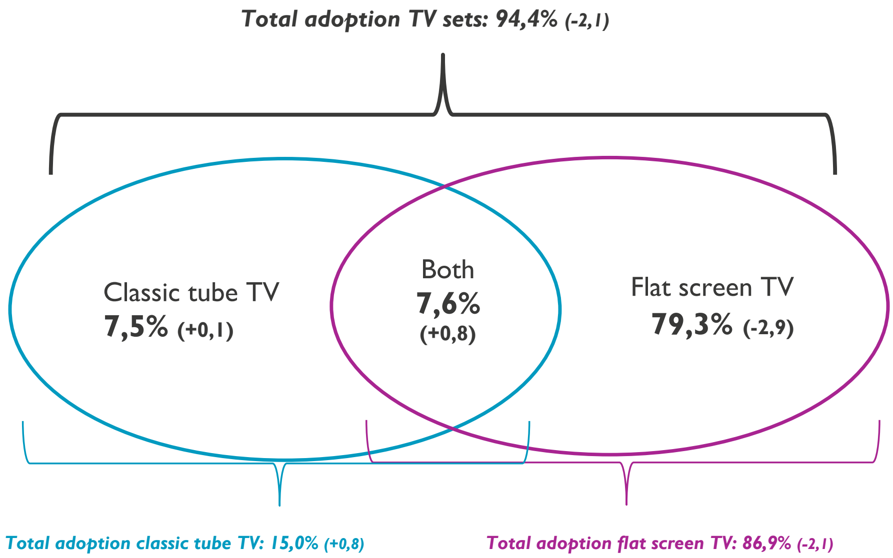
DEVICES & CONNECTIONS

TV EQUIPMENT

TV SETS

For most Flemings, the television screen remains a central device, with 94,4% of the Flemish population having a television set at home. Just like in previous years, the classic tube TV has become an exception. Remarkably, the adoption of flat screen TVs seems to have dropped by 2,1 percentage points to 86,9%. It should be noted, however, that this is not a statistically significant change, and should be considered within the margin of fluctuation peculiar to the survey method.

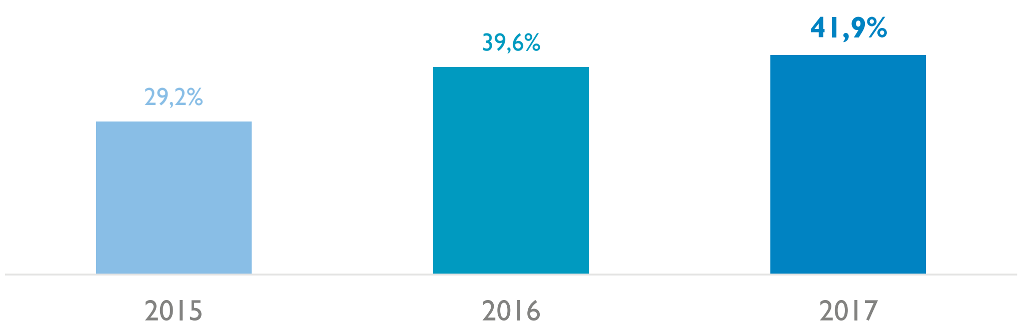
ADOPTION OF TV SETS: CLASSIC TUBE TV VS. FLAT SCREEN TV



Devices graph 1: Adoption television sets (N=2.345)

Just like last year, 4 out of 10 Flemings have a smart TV at home (41,9%, +2,3 percentage points). As such, the adoption of smart TVs in Flanders is at the same level as in other European countries (e.g. the Netherlands: 42%[5]; United Kingdom: 38%[6]).

SMART TV



Devices graph 2: 'Which functionalities does your TV set have? – % smart TV' (N=2.345)

5 https://kijkonderzoek.nl/images/Persberichten_algemeen/170720_Persbericht_TV_in_Nederland_1e_helft_2017.pdf

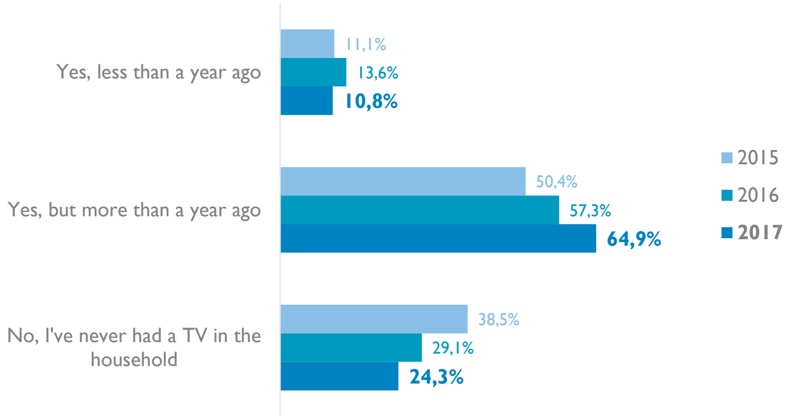
6 https://www.ofcom.org.uk/research-and-data/multi-sector-research/cmr/cmr-2017/uk

NO TV SET AT HOME

Like last year, some 5% of the Flemish population does not have a TV set at home (5,6%, +2,1 percentage points). 3 out of 4 Flemings who don't have a TV set at home have had one in the past (75,7%). For 64,9%, over a year has passed since they last owned a TV set. Only 24,3% of Flemish people without a television set at home have never had one in the past.

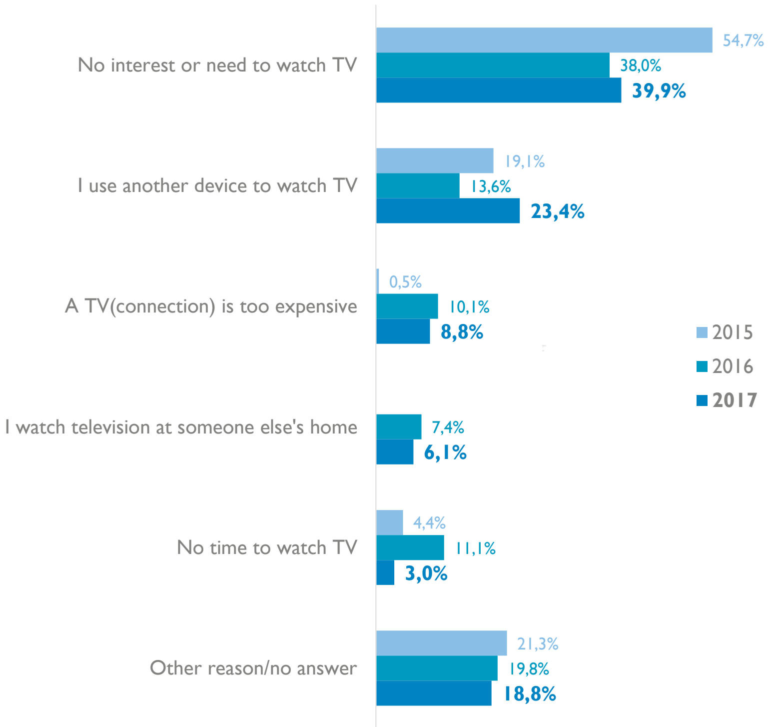
Lack of interest in or need to watch TV is still the main reason for not having a TV set at home (39,9%). Using another device to watch TV, such as a laptop, comes in second place (23,4%).

DID YOU PREVIOUSLY HAVE A TV SET AT HOME?



Devices graph 3: 'Did you previously have a TV set at home?' (of people with no TV set at home, N=132)

MAIN REASON FOR NOT HAVING A TV SET AT HOME



Devices graph 4: 'Main reason for not having a TV set at home' (of people with no TV set at home, N=132)

TV-RELATED DEVICES

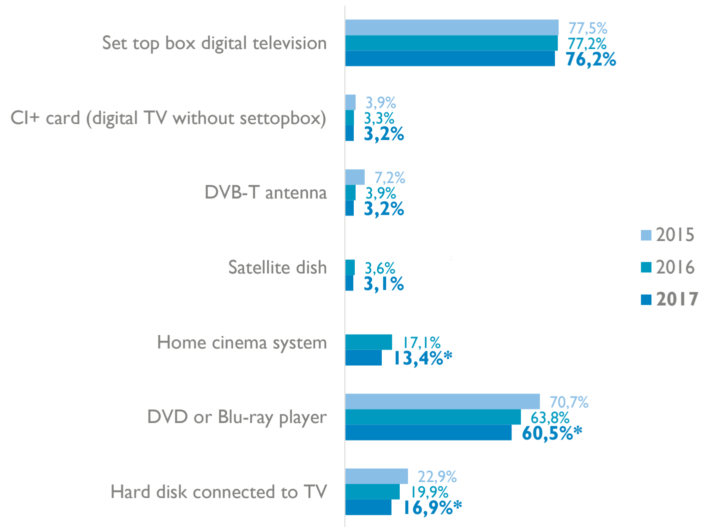
The presence of a set top box (STB) remains stable. More than 3 out of 4 Flemings have a STB such as a Digicorder by Telenet or a Proximus TV decoder (76,2%). Other solutions for connecting to a digital TV network are still rather niche, with merely 3,2% of the Flemish population having a CI+-card, 3,2% having a DVBT antenna and 3,1% having a satellite dish.

A substantial portion of the Flemish population is not satisfied with merely watching TV content (especially films and series); they want to experience it. This desire isn't just evident in the fact that 13,8% of Flemings have an ultra-HD TV screen, but also in the fact that 13,4% of Flemings claim to have a home cinema system. However, it should be noted that the presence of a home cinema system has dropped significantly compared to last year (-3,7 percentage points). The adoption of home cinema systems is strongly related to having a subscription to a video-on-demand (VOD) service (Netflix, Telenet Play/Play More, Proximus Movies & Series Pass or a sports pack), stressing the importance of the quality of the entertainment experience. 22,5% of Flemings with subscriptions to a VOD service have home cinema systems, compared to only 8,9% of Flemings who are not subscribed to a VOD service.

The majority of the Flemish population still has a DVD or Blu-ray player at home (60,5%). However, for the second consecutive year, there is a significant drop compared to last year (-3,3 percentage points).

1 in 6 Flemings (or 16,9%) have a hard disk connected to their TV (either built into a DVD or Blu-ray player or as a standalone hard disk such as a NAS-system). This figure is significantly lower compared to last year, when 19,9% of the Flemish population had a hard disk connected to their TV.

TV-RELATED DEVICES



Devices graph 5: 'Which of the following devices do you have access to within your household?' (N=2.345)
* Statistically significant change compared to the previous year, based on a chi-square test.

HOME CINEMA SYSTEM OWNERSHIP

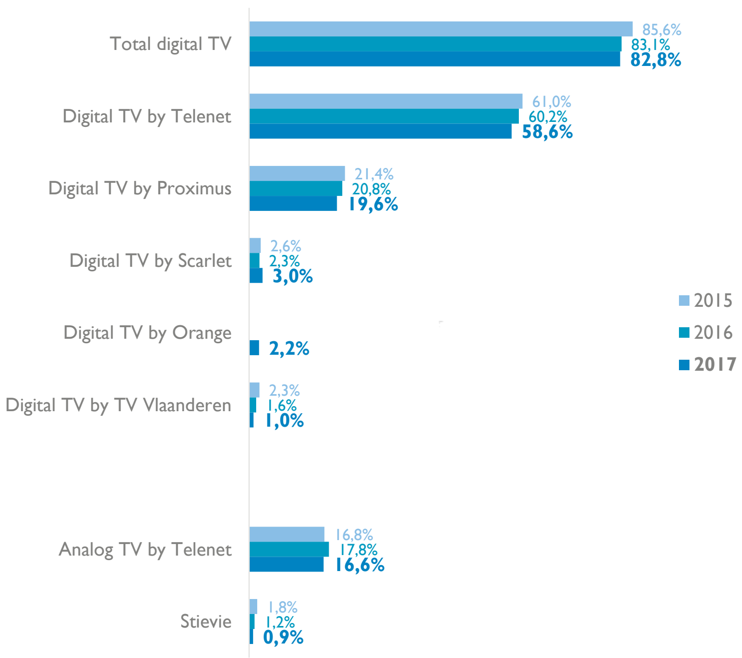
Devices graph 6: 'Owning a home cinema system' - split by having a VOD subscription or not (N=2.345)
* Statistically significant difference between both groups, based on a chi-square test.

TV CONNECTIONS & SUBSCRIPTIONS

TV CONNECTIONS

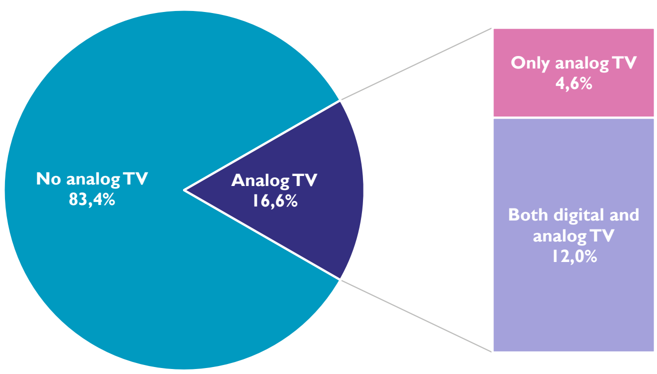
Just as in previous years since 2012, more than 8 in 10 Flemings have a digital TV connection at home (82,8%). The balance of power remains unchanged, with Telenet as the clear market leader (58,6% of Flemings have a digital TV subscription with Telenet) and Proximus as the main challenger (19,6% of the Flemish population has a digital TV subscription with Proximus). Other providers like Scarlet (3,0%) or TV Vlaanderen (1,0%) are lagging behind. Since its launch in March 2016, Base TV has reached 2,2% of Flemings[7]. 0,9% claim to have a subscription to Stievie (not to be confused with the free online service Stievie Free). A remarkable 16,6% claim to still have an analog TV subscription. Note that the majority of those people combine an analog TV connection (for a TV set in the bedroom, for instance) with a digital TV connection for another TV set (for the main TV set in the living room, for instance).

TV CONNECTIONS



Devices graph 7: 'Which of the following TV connections do you have access to within your household?' (N=2.345)

HAVING AN ANALOG TV CONNECTION - SPLIT BY ALSO HAVING A DIGITAL TV CONNECTION OR NOT



Devices graph 8: 'Having an analog TV connection' - split by also having a digital TV connection or not (N=2.345)

7 https://corporate.orange.be/en/news-medias/mobistar-internet-tv-now-available-6-cities-start-extra-channels-are-added-already

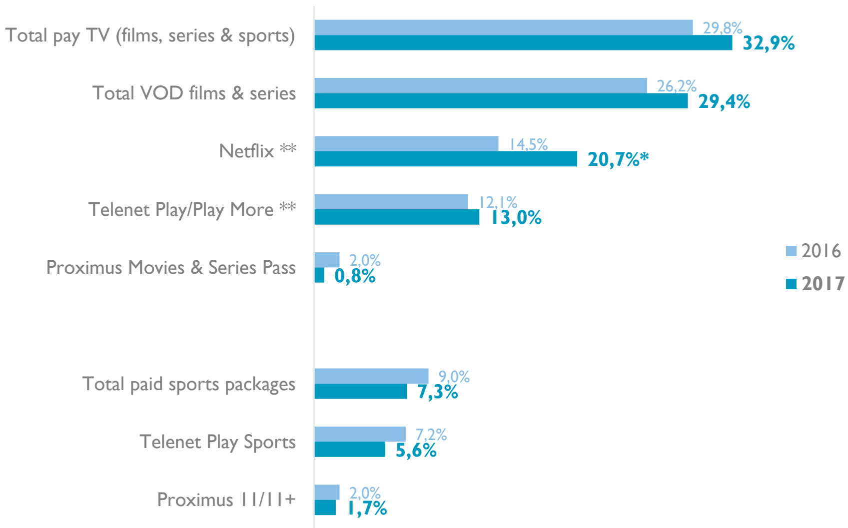
PAY TV PACKAGES

Some 1 in 3 Flemings claim to have access to a pay TV subscription (32,9%). Most commonly, this is a video-on-demand (VOD) service for films and series (29,4% of the Flemish population has access to such a subscription), with Netflix (20,7%) and Telenet Play or Play More (13,0%) the most popular services.

The growth of Netflix (+6,2 percentage points) is remarkable, but as discussed in “A word on Netflix”, Flanders is still lagging behind compared to countries like the Netherlands and the UK. As illustrated in graph 10, Netflix has gained ground especially among the younger age groups (younger than 40 years old) and among families with children. Moreover, Netflix is growing in popularity among men and women alike. Remarkably, the growth of Netflix is not situated among Flemings without a digital TV subscription, but among those who do have a digital TV subscription.

7,3% of Flemings have a subscription to a paid sports package, with Telenet Play Sports (5,6%) being the model sports video service in Flanders.

PAY TV SUBSCRIPTIONS

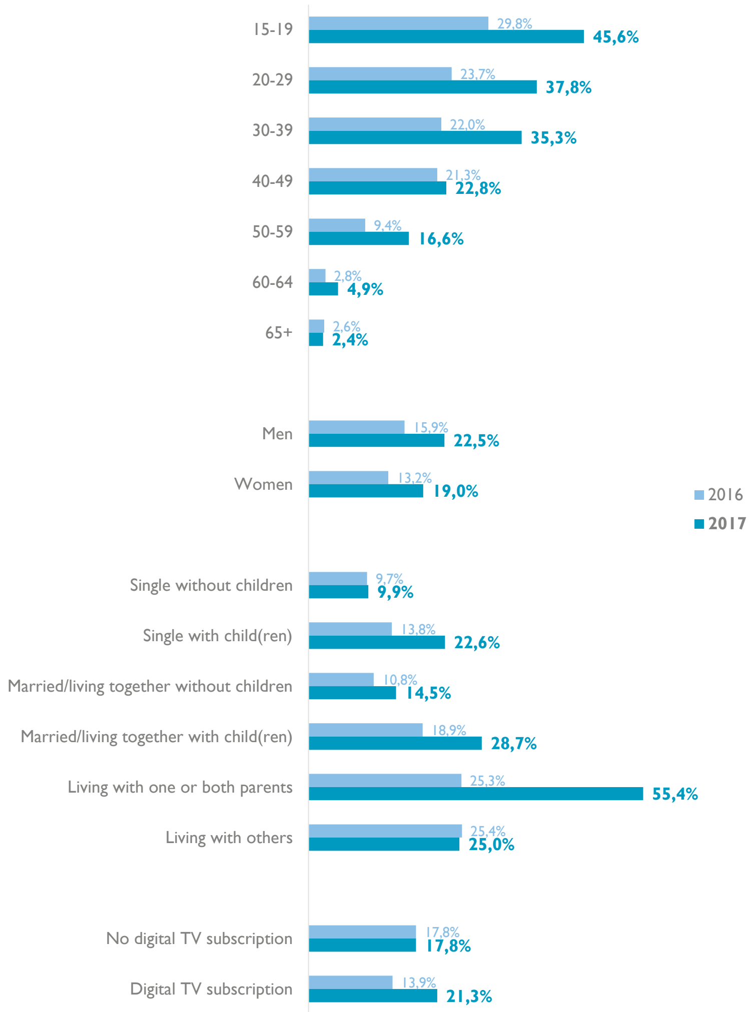


Devices graph 9: ‘Which of the following pay TV services are you subscribed to?’ (N=2.345)

* Statistically significant change compared to the previous year, based on a chi-square test.

** We would like to stress that digimeter only expresses the number of Flemings claiming to have access to a certain VOD service. These figures do not reflect the total number of subscriptions sold in Flanders. Due to the nature of both services, we can assume that a Netflix account is more commonly shared with a larger group of friends or relatives outside of the family compared to Telenet Play and Play More.

NETFLIX GROWTH



Devices graph 10: Having access to Netflix subscription – split by age, gender, family situation and having a digital TV subscription (N=2.345)

A WORD ON NETFLIX

1 in 5 Flemings claim to have access to Netflix within their households (20,7%). Although this is a substantial portion, it is still below the adoption rate in, for instance, The Netherlands (32%)[8] and the UK (31%)[9]. Moreover, the increase compared to last year (+6,2 percentage points, or an increase of 42,8%[10]) is in line with the increase in the number of international streaming subscriptions for Netflix (i.e. the number of subscriptions outside of the US). The number of international streaming subscriptions increased from 36 million in June 2016 to 52 million in June 2017, an increase of 44,3%[11]. So, in other words, although the growth of Netflix in Flanders does seem remarkable in itself, when put in the perspective of the international market, it is not that surprising.

In 2014, a study dedicated to the potential of Netflix in Flanders[12] revealed that content (both in quality and in quantity) was key to convince people to buy Netflix subscriptions and to hold on to it. In the first months after the launch of Netflix in 2014, Flemish subscribers to the service reported to be somewhat dissatisfied with the content available on Netflix, and that this could be a reason to end their subscriptions. Since then, Netflix has made efforts to provide its subscribers with an impressive catalogue of (mainly) series, with a remarkably large share of Netflix original content (i.e., content produced by Netflix). Netflix claims to have invested $5 billion in 2015 on original content, and expects to spend between $7 billion and $8 billion in 2018 on original content[13]. This is also apparent in the nominations and wins at the Emmy awards. Netflix has closed in on HBO in a rapid pace. In 2014, Netflix obtained 31 nominations (versus 99 for HBO), while in 2017, Netflix reached 91 nominations (versus 110 for HBO)[14] and won 20 of them (versus 29 for HBO)[15].

This demonstrates the increased importance of original content on Netflix, a move appreciated by the audience as the number of subscribers is still rising.

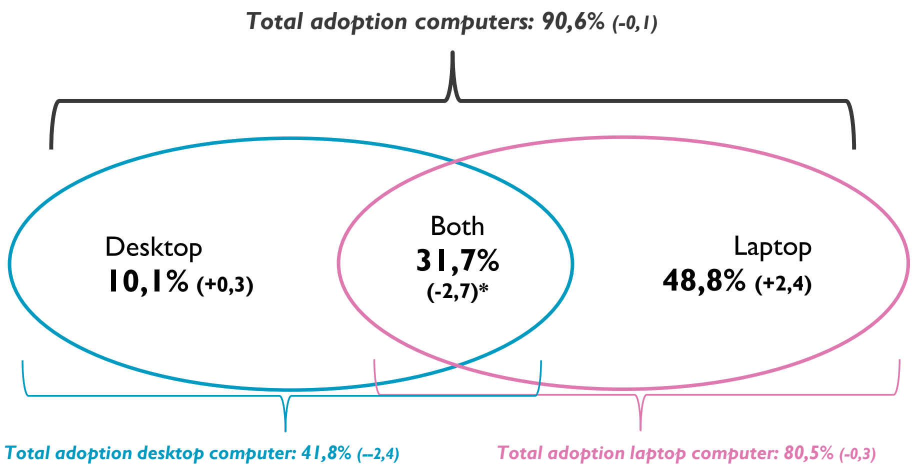
8 https://www.telecompaper.com/nieuws/netflix-blijft-grootste-svod-dienst-in-nl-groei-met-2-procent-gering-in-q3--1216256
9 https://www.ofcom.org.uk/research-and-data/multi-sector-research/cmr/cmr-2017/uk
10 We would like to refer to the difference between evolutions expressed in percentage points versus relative percentages as explained in the section on Methodology of this report. The evolution expressed as percentage points is 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 would represent an increase of 50% (because to get from 20% to 30%, an increase of half the value of the starting point is needed).
11 https://ir.netflix.com/
12 The Netflix study can be downloaded at imec.be/digimeter
13 https://techcrunch.com/2017/10/16/netflixs-original-content-costs-are-ballooning/
14 https://www.theverge.com/2017/7/13/15966802/netflix-hbo-emmy-awards-nominations-streaming-vs-cable
15 https://techcrunch.com/2017/09/18/netflix-and-hbo-cleaned-up-at-last-nights-primetime-emmys/

COMPUTERS & INTERNET

COMPUTERS

Computers remain omnipresent in Flemish households, with 9 in 10 Flemings having a computer at home (90,6%). Most commonly, this is a laptop, which includes notebooks and hybrid laptop-tablet devices with detachable screens (80,5%). The presence of desktop computers is losing ground, as only 41,8% of the Flemish population claims to have one (-2,4 percentage points). In 2017, 31,7% owned both types of computers, down from 34,4% in 2016 and 39,8% in 2015. Since 2015, it seems that people who owned both a desktop and a laptop are disposing of their desktop computers.

ADOPTION OF COMPUTERS: DESKTOP COMPUTERS VS. LAPTOP COMPUTERS



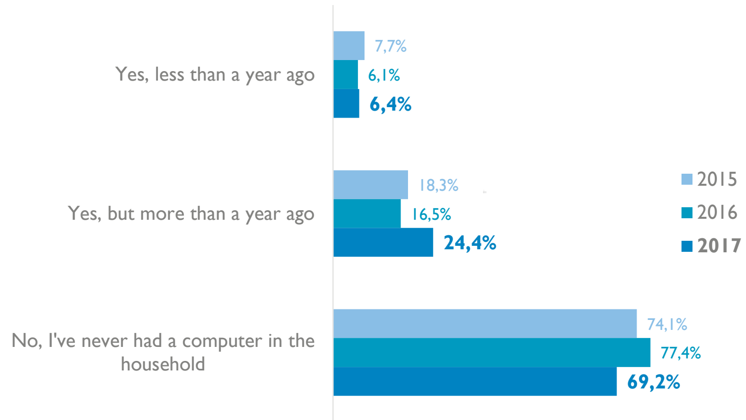
Devices graph 11: 'Adoption of computers' (N=2.345)

* Statistically significant change compared to the previous year, based on a chi-square test.

NOT HAVING A COMPUTER AT HOME

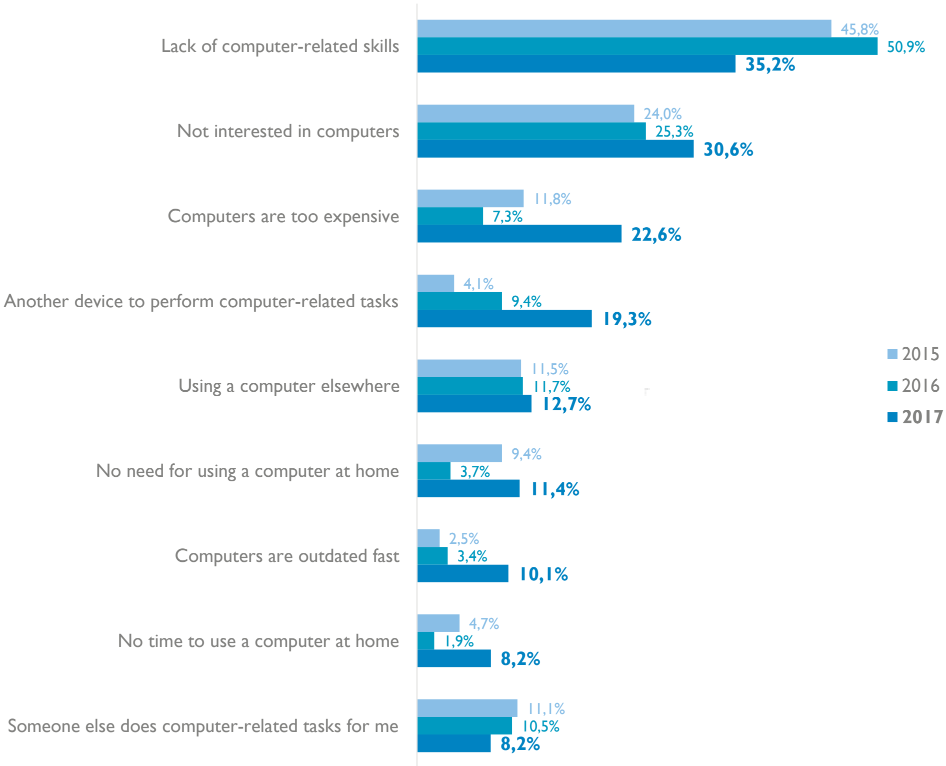
Just like previous years, 1 in 10 Flemings doesn't have a computer (either desktop or laptop) at home (9,4%). Some 7 in 10 Flemings who don't have a computer at home have never had one in the past. This is remarkably lower compared to last year (-8,2 percentage points). The main reason for not having a computer remains lack of skill (35,2%), which is remarkably lower compared to last year (-15,7 percentage points). Lack of interest in computers comes in at second place (30,6%, +5,3). A strikingly larger number state not owning a computer because it is too expensive (22,6%, +15,3 percentage points) or because they have another device (a tablet for instance) to perform computer-related tasks (19,3%, +9,9 percentage points).

DID YOU PREVIOUSLY HAVE A COMPUTER AT HOME?



Devices graph 12: 'Did you previously have a computer at home?' (of people with no computer at home, N=201)

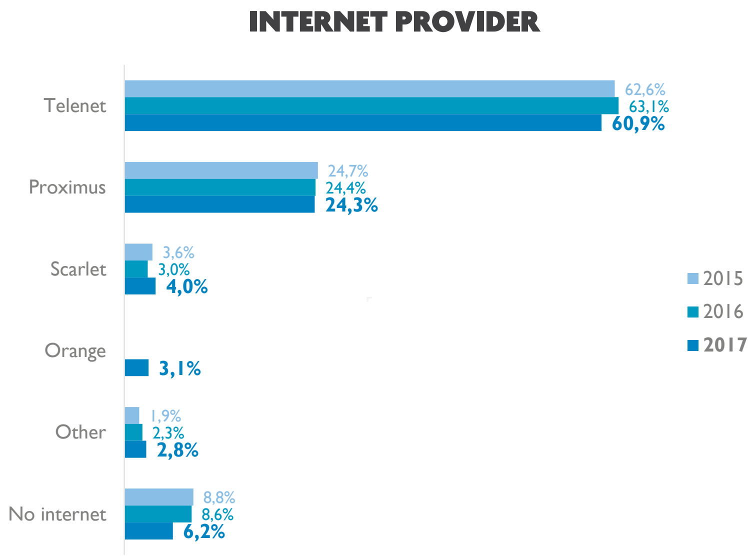
REASONS FOR NOT HAVING A COMPUTER AT HOME



Devices graph 13: 'Reasons for not having a computer at home' (of people with no computer at home, N=211)

INTERNET

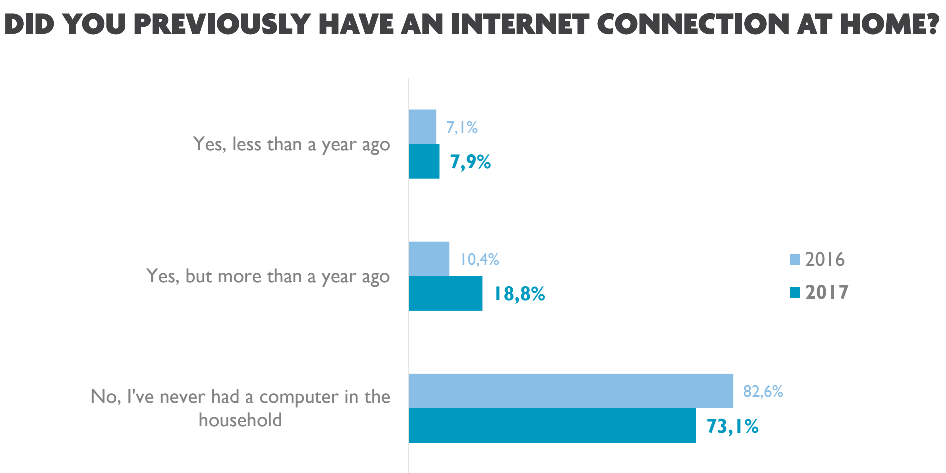
The market shares of internet providers in Flanders seem to be set in stone. Telenet remains the clear market leader, serving 60,9% of the Flemish population, while a quarter of Flemings have an internet connection with Proximus (24,3%). Orange provides services to 3,1% of the market. It seems that Orange is mainly pinching customers from Telenet (-2,2 percentage points). 1 in 16 Flemings claims to have no internet at home (6,2%).



Devices graph 14: 'Internet connection provider in your household' (N=2.345)

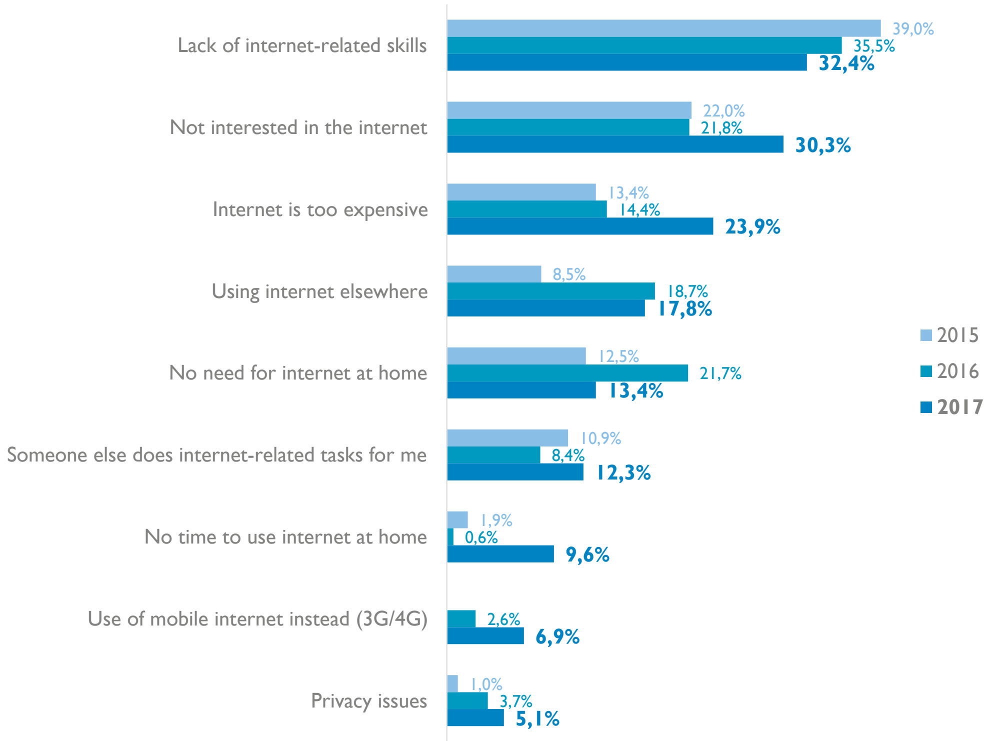
NOT HAVING INTERNET AT HOME

Just as the previous years, fewer than 1 in 10 Flemings claim to have no internet connection at home (6,2%). More than 7 in 10 Flemings who currently have no internet connection have never had one in the past (73,1%). As with computer non-adoption, the main reason for not having an internet connection at home is a perceived lack of skill (32,4%). The most remarkable shift is the fact that a quarter of Flemings with no internet connection at home state that the high costs of having an internet subscription is an important reason for non-adoption (23,9%, +9,5 percentage points).



Devices graph 15: 'Did you previously have an internet connection at home?' (of people with no internet connection at home, N=144)

REASONS FOR NOT HAVING AN INTERNET CONNECTION AT HOME



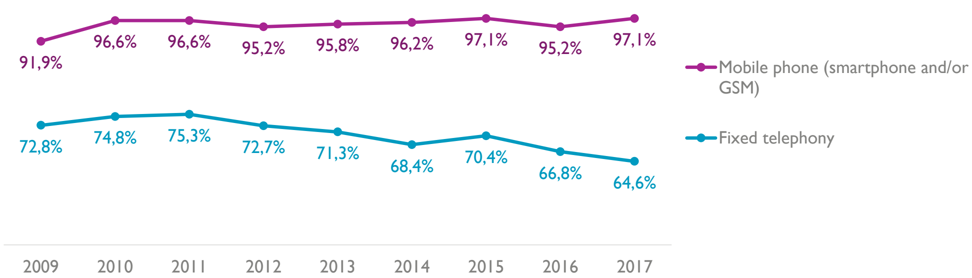
Devices graph 16: 'Reasons for not having an internet connection at home' (of people with no internet connection at home, N=144)

TELEPHONY

FIXED TELEPHONY

Fewer than 2 in 3 Flemings have a subscription to fixed telephony (landline connection), down from 66,8% in 2016 and 70,4% in 2015. In 2011, three quarters of the Flemish population (75,3%) had a landline connection. Meanwhile, the adoption of mobile telephony remains stable and fluctuates between 95% and 97% of the Flemish population having access to either a smartphone or a GSM (or both).

EVOLUTION OF FIXED TELEPHONY (LANDLINE) VS. MOBILE TELEPHONY



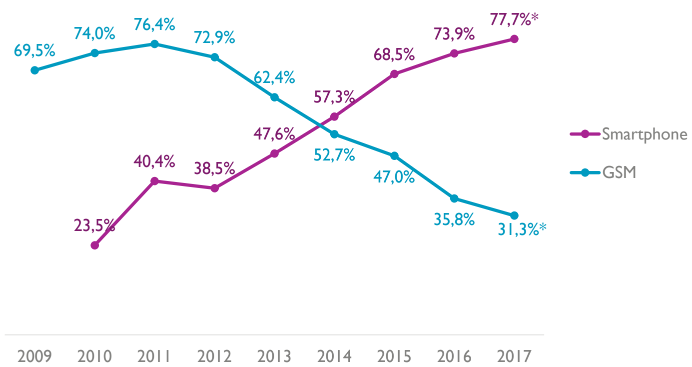
Devices graph 17: Evolution of having a fixed telephone line vs. having a mobile phone (smartphone and/or GSM) at home (N=2.345)

SMARTPHONE VS. GSM

Ever since the adoption of smartphones surpassed the adoption of 'regular' mobile phones (GSMs) in 2014, the divide between both curves has grown progressively. In 2017, over 3 out of 4 Flemings claim to have a smartphone in their pocket (77,7%), a significant increase of 3,8 percentage points compared to the previous year. The smartphone is increasingly finding acceptance across all age segments. Since 2016, the adoption rate of smartphones (55,7%) is higher than the adoption rate of regular GSMs (48,0%) among Flemings aged 50+. This divide has deepened in 2017 (smartphone: 63,0%; regular GSM: 42,4%). Among Flemings aged 65+, the GSM is still slightly more common (53,2%) than the smartphone (48,2%), but we see both curves clearly evolving towards each other even in this segment, and it is expected that within the next couple of years, the smartphone will outpace the regular GSM in this age segment.

Fewer than 1 in 3 Flemings report having a GSM at their disposal (31,3%), a significant decrease compared to 2016, when 35,8% of the Flemish population had a GSM. For 1 in 5 Flemings, the GSM is the only mobile phone they have (19,4%). The Flemings who only have a GSM and no smartphone are mainly less-educated people of 60 years and older.

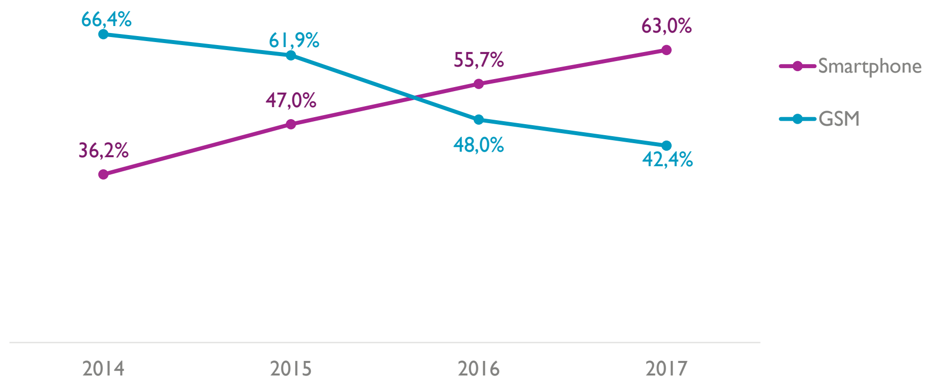
EVOLUTION IN ADOPTION OF SMARTPHONE VS. GSM



Devices graph 18: Evolution in adoption of smartphone vs. GSM (N=2.345)

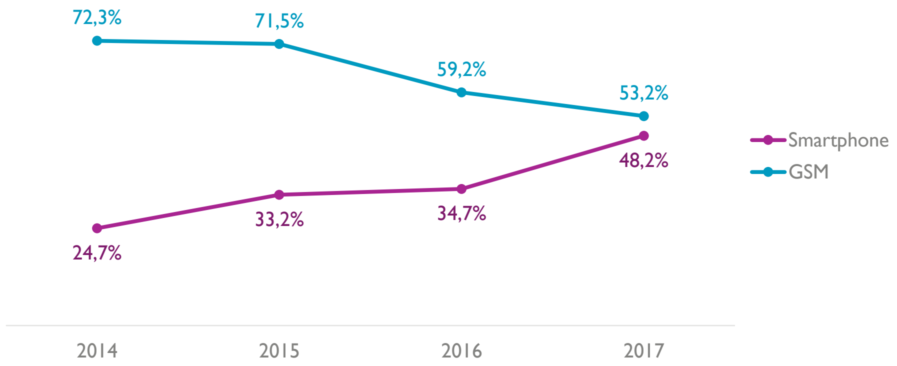
* Statistically significant change compared to the previous year, based on a chi-square test.

EVOLUTION IN ADOPTION OF SMARTPHONE VS. GSM AMONG FLEMINGS AGED 50+



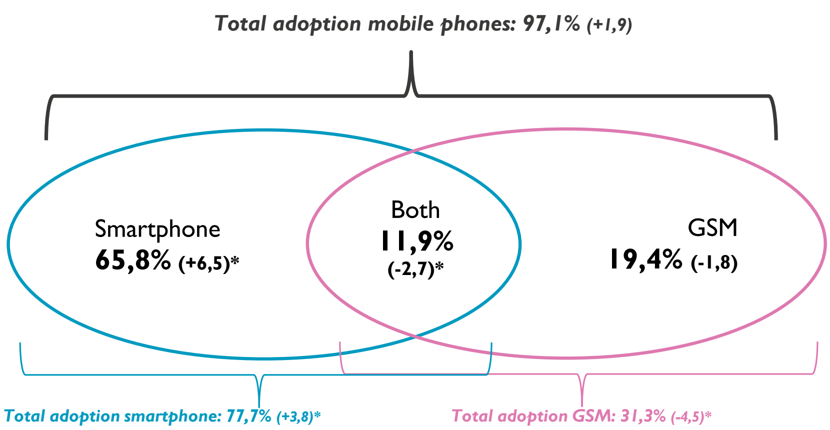
Devices graph 19: Evolution in adoption of smartphone vs. GSM among Flemings aged 50+ (N=1.162)

EVOLUTION IN ADOPTION OF SMARTPHONE VS. GSM AMONG FLEMINGS AGED 65+



Devices graph 20: Evolution in adoption of smartphone vs. GSM among Flemings aged 65+ (N=572)

ADOPTION OF MOBILE PHONES: SMARTPHONES VS. GSMS



Devices graph 21: Adoption of mobile phones (N=2.345)

* Statistically significant change compared to the previous year, based on a chi-square test.

PROFILING SMARTPHONE ADOPTERS (N=1.823)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	81,2%	51,0%	105
Women	74,4%	49,0%	96
Age			
15-19	94,3%	7,5%	121
20-29	93,3%	16,6%	120
30-39	93,9%	17,6%	121
40-49	88,8%	18,2%	114
50-59	81,0%	18,3%	105
60-64	68,7%	6,7%	88
65+	48,2%	15,1%	62
Household members			
1	59,6%	18,6%	77
2	73,9%	31,5%	95
3	86,7%	15,6%	111
4	94,3%	22,2%	121
5	94,7%	8,4%	122
6	95,0%	1,6%	123
6+	81,4%	2,1%	105
Household situation			
Single without children	59,4%	18,9%	76
Single with child(ren)	72,7%	5,1%	94
Married/living together without children	76,4%	26,3%	98
Married/living together with child(ren)	90,3%	29,3%	116
Living with one or both parents	93,3%	17,8%	120
Living with others	73,8%	2,7%	96

Devices table 1: Profiling smartphone adopters (N=1.823)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 7,5% of all smartphone owners are between 15 and 19 years old. That age group only makes up 6,2% of the population of Flanders aged 15 or more. The result is an index of 121, which indicates that the youngest age segment is overrepresented among smartphone owners.

	Level of adoption	Profile	Index profile compared with population*
Degree			
No degree or primary education	49,6%	8,7%	64
Lower secondary	72,3%	18,2%	93
Higher secondary	81,9%	39,3%	106
Bachelor	87,2%	18,7%	113
Master	90,8%	15,3%	117
Occupation			
Student	94,1%	15,0%	121
White-collar worker	91,6%	26,0%	118
Blue-collar worker	79,4%	6,1%	102
Public servant/teacher	89,6%	11,8%	116
C-level	94,9%	5,1%	121
Self-employed	89,3%	4,0%	114
Liberal profession	82,9%	0,5%	100
House husband/wife	70,3%	2,2%	88
Unemployed	74,1%	9,1%	95
Retired	53,4%	20,0%	69
Net income			
€ 999 or less	53,4%	1,5%	68
€ 1.000 - € 1.499	59,1%	10,1%	76
€ 1.500 - € 1.999	71,9%	10,2%	93
€ 2.000 - € 2.999	77,2%	16,5%	99
€ 3.000 - € 3.999	93,4%	17,8%	120
€ 4.000 - € 4.999	94,5%	11,7%	122
€ 5.000 or more	95,0%	6,6%	122
Don't know	82,4%	12,0%	106
Prefer not to say	67,0%	13,6%	87

Devices table 1: Profiling smartphone adopters (N=1.823)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 15,0% of all smartphone owners are students. Students only make up 12,4% of the population of Flanders aged 15 or more. The result is an index of 121, which indicates that students are overrepresented among smartphone owners.

PROFILING GSM-ONLY ADOPTERS (N=455)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	15,6%	39,3%	81
Women	23,0%	60,7%	119
Age			
15-19	3,4%	1,1%	18
20-29	4,7%	3,3%	24
30-39	5,6%	4,2%	29
40-49	9,3%	7,6%	48
50-59	16,8%	15,2%	87
60-64	27,0%	10,6%	139
65+	46,1%	57,9%	237
Household members			
1	34,5%	43,6%	179
2	23,9%	41,0%	123
3	11,1%	8,1%	58
4	4,4%	4,2%	23
5	4,3%	1,5%	22
6	5,0%	0,3%	23
6+	11,9%	1,2%	60
Household situation			
Single without children	34,0%	44,0%	177
Single with child(ren)	24,6%	7,0%	130
Married/living together without children	22,1%	30,9%	115
Married/living together with child(ren)	8,4%	11,0%	44
Living with one or both parents	4,9%	3,8%	26
Living with others	22,2%	3,3%	118

Devices table 2: Profiling GSM only adopters (no smartphone) (N=455)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 57,9% of all Flemings owning a GSM but no smartphone are aged 65 years and older. That age group only makes up 24,4% of the total population of Flanders aged 15 or more. The result is an index of 237, which clearly indicates that the oldest age segment is highly overrepresented among 'GSM only' owners.

	Level of adoption	Profile	Index profile compared with population*
Degree			
No degree or primary education	44,7%	31,2%	229
Lower secondary	22,2%	22,3%	114
Higher secondary	15,8%	30,3%	81
Bachelor	12,1%	10,4%	63
Master	8,6%	5,8%	44
Occupation			
Student	4,2%	2,7%	22
White-collar worker	7,5%	8,5%	38
Blue-collar worker	18,2%	5,6%	93
Public servant/teacher	9,2%	4,8%	47
C-level	3,4%	0,7%	17
Self-employed	6,2%	1,1%	31
Liberal profession	17,1%	0,4%	80
House husband/wife	23,6%	3,0%	120
Unemployed	21,8%	10,8%	113
Retired	41,6%	62,3%	214
Net income			
€ 999 or less	30,1%	3,4%	155
€ 1.000 - € 1.499	33,8%	23,2%	174
€ 1.500 - € 1.999	26,9%	15,2%	138
€ 2.000 - € 2.999	21,0%	18,0%	108
€ 3.000 - € 3.999	5,6%	4,3%	29
€ 4.000 - € 4.999	5,5%	2,7%	28
€ 5.000 or more	2,4%	0,7%	13
Don't know	14,3%	8,3%	73
Prefer not to say	29,9%	24,2%	154

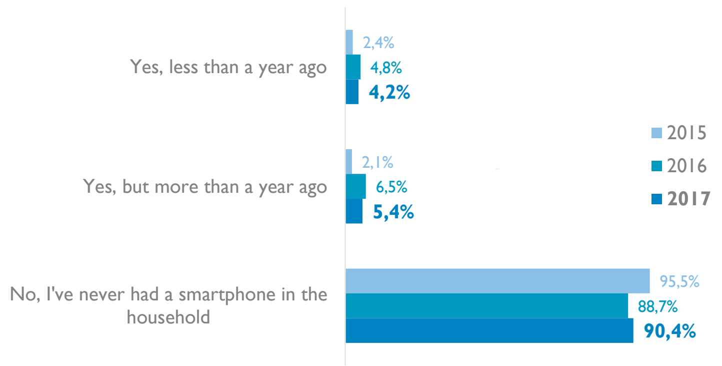
Devices table 2: Profiling GSM only adopters (no smartphone) (N=455)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 31,2% of all Flemings owning a GSM but no smartphone have at most a primary education degree or no degree at all. That segment only makes up 13,6% of the total population of Flanders aged 15 or more. The result is an index of 229, which clearly indicates that the lowest-educated segment is highly overrepresented among 'GSM only' owners.

NO SMARTPHONE

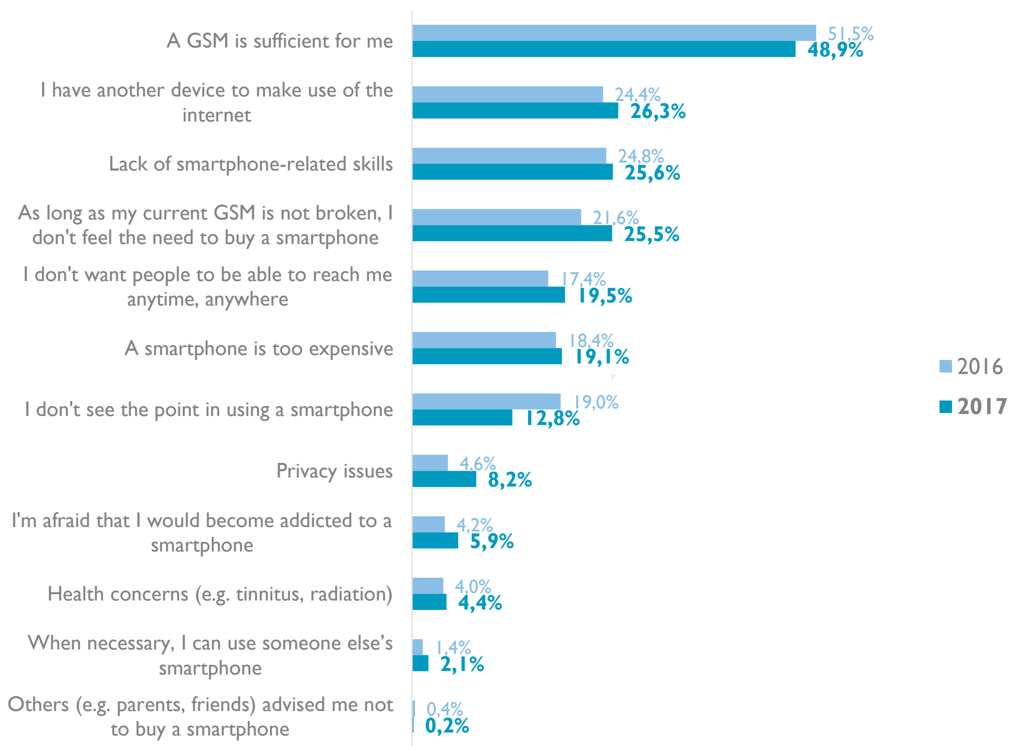
Less than a quarter of Flemings don't have a smartphone (22,3%), which is a significant decrease compared to last year (-3,8 percentage points). Most people who currently don't have a smartphone never had one before (90,4%). 9,6% of Flemings without a smartphone did have a smartphone before (4,2% within a year ago, 5,4% more than a year ago). The main reason for never having owned a smartphone is because they don't see added value compared to GSM use. People who used to have a smartphone[16] report bad experiences as important drivers to discarding the smartphone: they no longer wish to be reached anytime and anywhere, they don't see added value compared to the regular GSM, and they found the smartphone too expensive (both the purchase and the subscription fee). Some respondents even developed an aversion to smartphones.

HAVE YOU EVER HAD A SMARTPHONE BEFORE?



Devices graph 22: 'Have you ever had a smartphone before?' (of people with no smartphone, N=506)

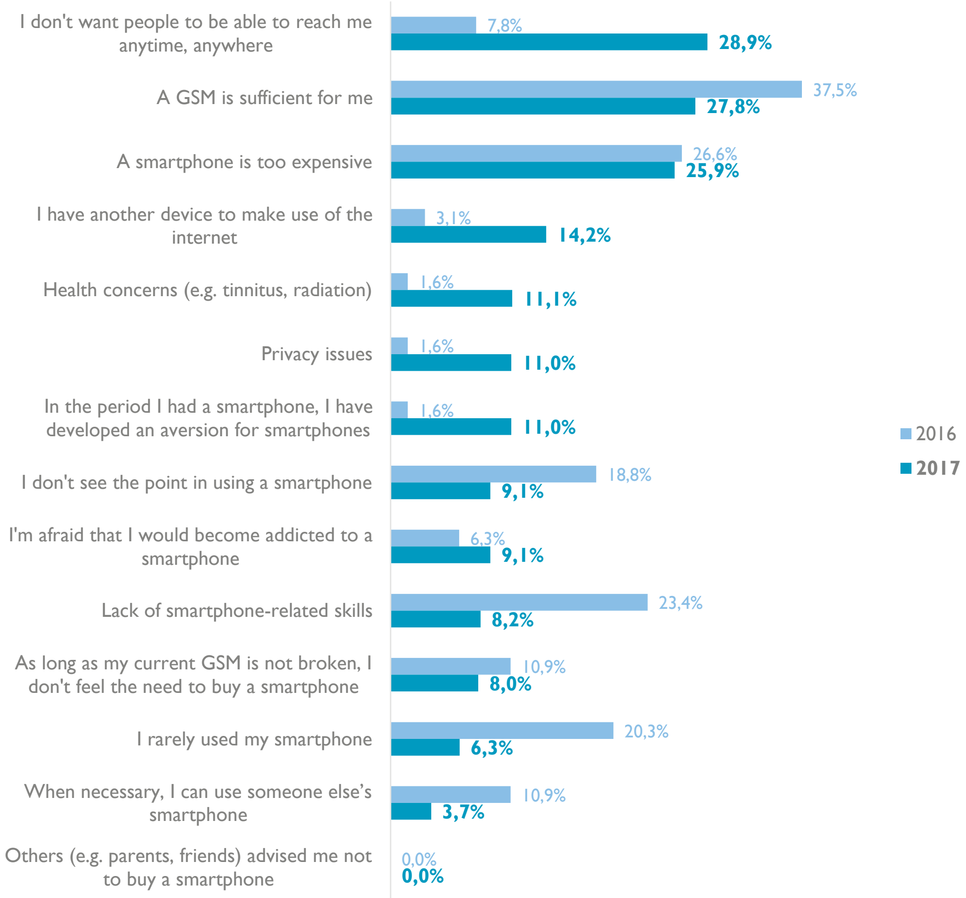
REASONS FOR NOT HAVING A SMARTPHONE: NEVER HAD A SMARTPHONE



Devices graph 23: 'Reasons for not having a smartphone' (of people who never had a smartphone, N=457)

16 Due to the low sample size (N=49), any interpretation and comparison should be considered with caution. The figures serve as an indication of important reasons for having discarded the smartphone.

REASONS FOR NOT HAVING A SMARTPHONE: USED TO HAVE A SMARTPHONE**



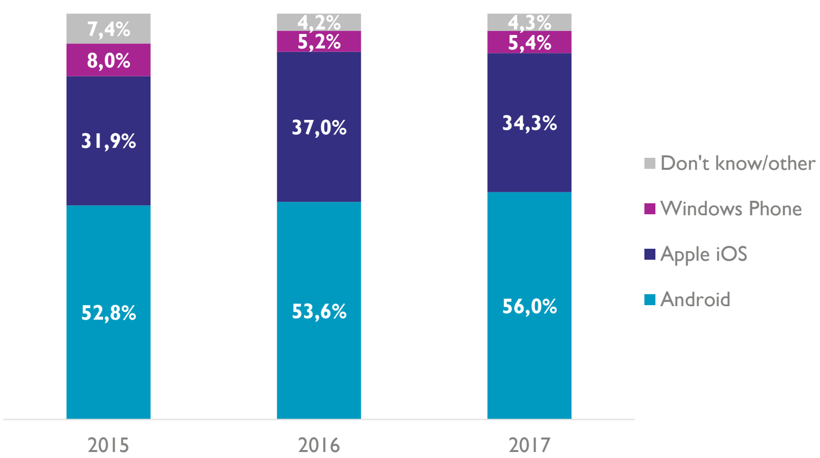
Devices graph 24: 'Reasons for not having a smartphone' (of people who used to have a smartphone, but don't anymore, N=49)

** Due to the low sample size (N=49), any interpretation and comparison should be considered with caution. The graph serves as an indication of important reasons for having discarded the smartphone.

SMARTPHONE: OPERATING SYSTEMS

Android remains the most popular operating system for smartphones in Flanders (56,0%). iOS (iPhone) comes in second place at 34,3%. 1 in 20 Flemings states mainly using a smartphone with a Microsoft Windows operating system (being mainly Windows Phone or Windows 10).

OPERATING SYSTEM OF THE MOST FREQUENTLY USED SMARTPHONE



Devices graph 25: 'Operating system of the most frequently used smartphone' (of people owning a smartphone, N=1.599)

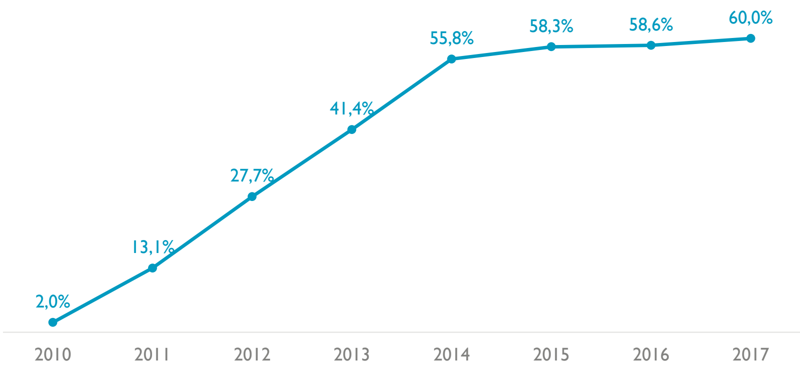
TABLET

TABLET ADOPTION

For the third year in a row, 6 in 10 Flemings claim to have a tablet at home (60,0%). This demonstrates the contrast between the tablet and the smartphone when it comes to adoption growth. Indeed, whereas the number of Flemings owning a smartphone is still increasing to become nearly 8 in 10 Flemings today, tablet adoption seems to have reached its peak in 2015.

Just like in previous years, the profile of tablet adopters is slightly older than, for instance, the profile of smartphone adopters. As we highlighted last year, we see two distinct types of tablet users. The first segment is the young family with children. For this group, the tablet is just another device (next to the smartphone and the laptop), and is shared among the other family members. The second segment is comprised of people aged 40 to 60 years old living together with their partner with no children at home. For them, the tablet is a central device used to gain access to the digital world.

EVOLUTION OF TABLET ADOPTION



Devices graph 26: Evolution of tablet adoption (N=2.345)

PROFILING TABLET ADOPTERS (N=1.408)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	62,1%	50,5%	103
Women	58,0%	49,5%	97
Age			
15-19	75,3%	7,8%	126
20-29	64,4%	14,8%	107
30-39	72,8%	17,7%	121
40-49	73,3%	19,4%	122
50-59	59,9%	17,5%	100
60-64	47,2%	6,0%	79
65+	41,6%	16,9%	69
Household members			
1	35,1%	14,2%	58
2	60,6%	33,3%	100
3	69,5%	16,2%	116
4	79,2%	24,0%	131
5	79,9%	9,1%	132
6	67,8%	1,4%	108
More than 6	54,7%	1,8%	90
Household situation			
Single without children	34,3%	14,2%	57
Single with child(ren)	55,9%	5,1%	94
Married/living together without children	62,9%	28,1%	105
Married/living together with children	77,6%	32,7%	130
Living with one or both parents	72,7%	18,0%	122
Living with others	39,7%	1,9%	68

Devices table 3: Profiling tablet adopters (N=1.408)

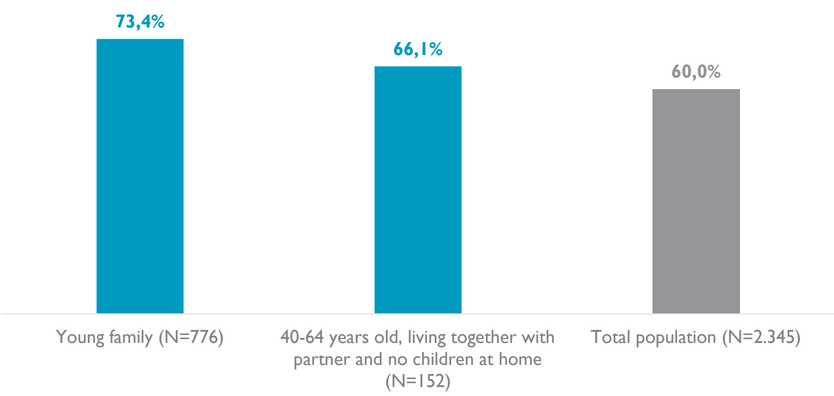
* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 16,9% of all Flemings having access to a tablet at home are at least 65 years old. That age group makes up 24,4% of the total population of Flanders aged 15 or more. The result is an index of 69, which clearly indicates that the oldest age segment is underrepresented among Flemings having a tablet at home.

	Level of adoption	Profile	Index profile compared with population*
Degree			
No degree or primary education	35,8%	8,1%	60
Lower secondary	55,0%	17,9%	92
Higher secondary	62,7%	38,9%	105
Bachelor	72,0%	19,9%	120
Master	69,8%	15,2%	116
Occupation			
Student	71,8%	14,8%	119
White-collar worker	69,5%	25,5%	115
Blue-collar worker	64,5%	6,4%	107
Public servant/teacher	72,6%	12,3%	121
C-level	81,4%	5,7%	136
Self-employed	79,6%	4,6%	131
Liberal profession	53,8%	0,4%	80
House husband/wife	39,0%	1,6%	64
Unemployed	44,2%	7,1%	74
Retired	44,2%	21,4%	74
Net income			
€ 999 or less	22,7%	0,8%	36
€ 1.000 - € 1.499	31,2%	6,9%	52
€ 1.500 - € 1.999	48,0%	8,8%	80
€ 2.000 - € 2.999	64,2%	17,8%	107
€ 3.000 - € 3.999	77,1%	19,0%	128
€ 4.000 - € 4.999	81,1%	13,0%	135
€ 5.000 or more	88,9%	8,0%	148
Don't know	65,3%	12,3%	109
Prefer not to say	51,0%	13,4%	85

Devices table 4: Profiling tablet adopters (N=1.408)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 4,6% of all Flemings having access to a tablet at home are self-employed. That segment makes up 3,5% of the total population of Flanders aged 15 or more. The result is an index of 131, which clearly indicates that self-employed people are overrepresented among Flemings having a tablet at home.

TABLET ADOPTION RATE BY USER TYPE



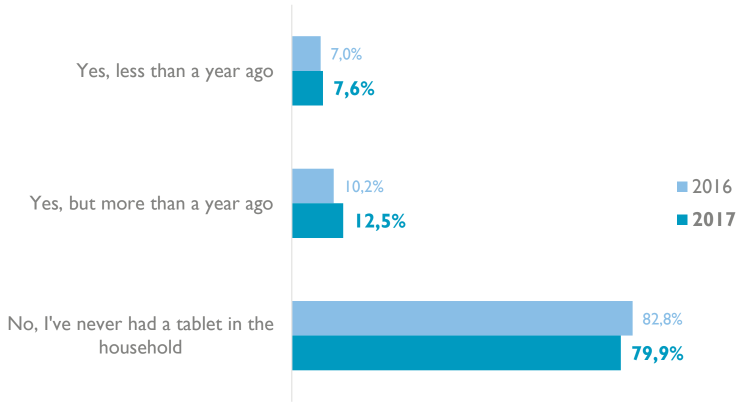
Devices graph 27: Tablet adoption rate by user type

WITHOUT A TABLET

The number of Flemings who don't have access to a tablet has remained stable (40,0%, compared to 41,4% last year). 8 in 10 Flemings who don't have a tablet now have never had one before (79,9%), mainly because they use other devices to connect to the internet (51,1%), and don't see the point in using a tablet (28,2%).

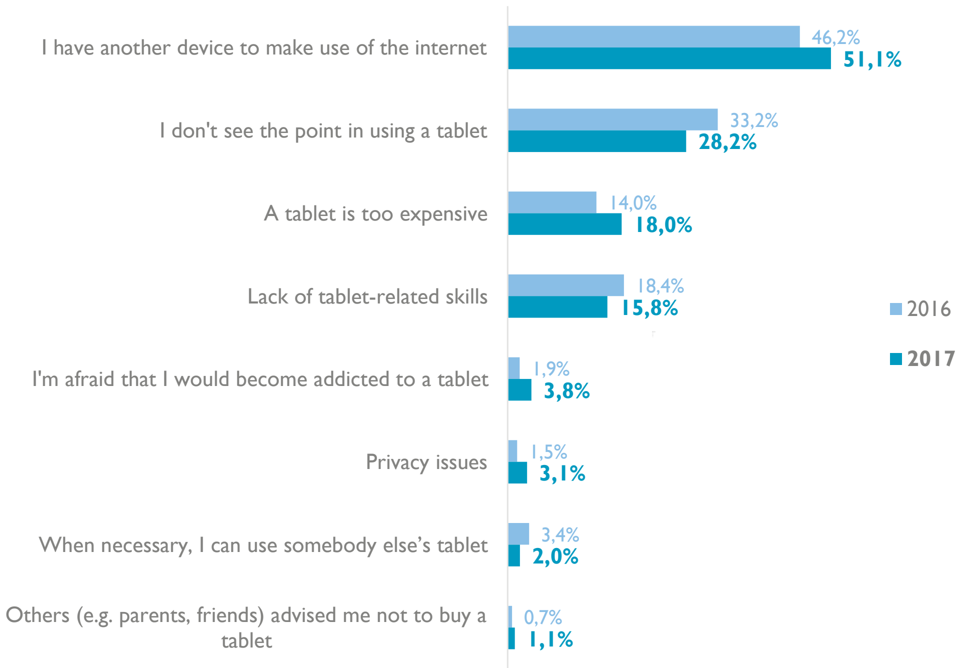
20,1% of the respondents who don't have a tablet now used to have one before. They discarded the tablet mainly because they have other devices that connect to the internet (47,8%) and because they rarely used it (24,5%).

HAVE YOU EVER HAD A TABLET BEFORE?



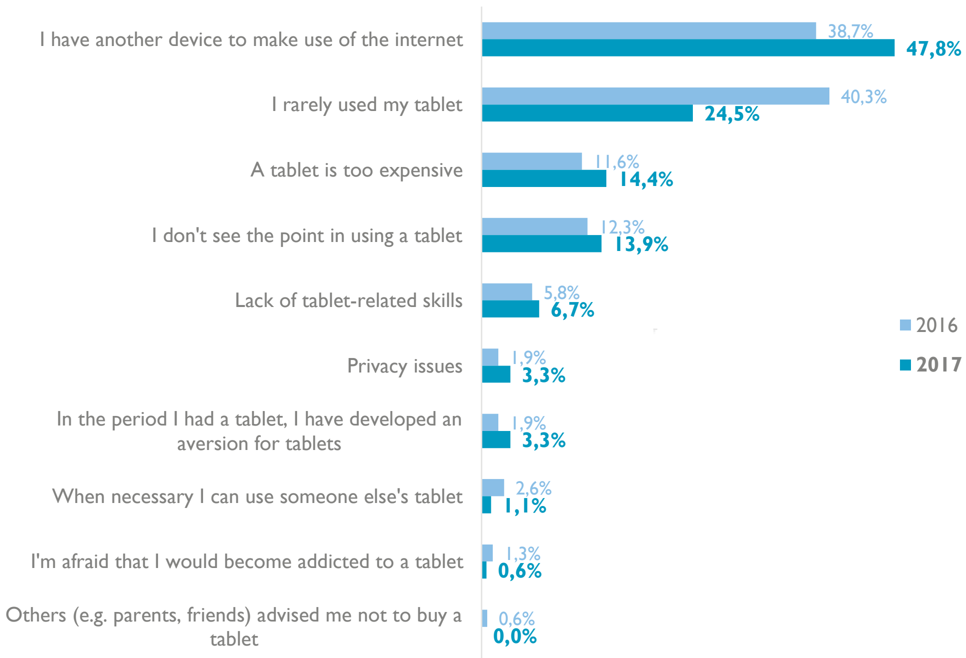
Devices graph 28: 'Have you ever had a tablet before?' (of people with no tablet, N=937)

REASONS FOR NOT HAVING A TABLET: NEVER HAD A TABLET



Devices graph 29: 'Reasons for not having a tablet' (of people who never had access to a tablet in their household before, N=717)

REASONS FOR NOT HAVING A TABLET: USED TO HAVE A TABLET

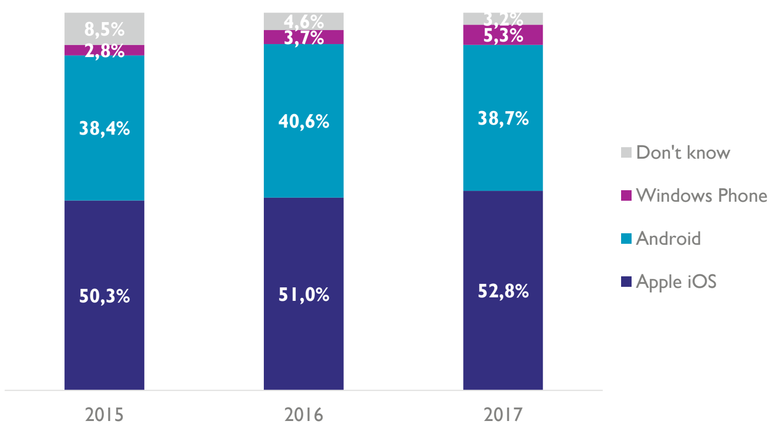


Devices graph 30: 'Reasons for not having a tablet' (of people who used to have access to a tablet in their household before, N=180)

TABLET: OPERATING SYSTEMS

As the tablet market seems to have reached a level of saturation for the last three years, it comes as no surprise that the shares of operating systems are not changing radically. Just over half of tablets are iPads (52,8%). Android-based tablets come in second place, with 38,7% of the market share. 1 in 20 Flemings states having a tablet running the Windows operating system (5,3%), presumably mainly a Microsoft Surface Pro tablet, a premium device targeting a professional audience[17].

OPERATING SYSTEM OF THE MOST FREQUENTLY USED TABLET



Devices graph 31: 'Operating system of the most frequently-used tablet' (of people owning a tablet, N=1.408)

17 http://www.techradar.com/news/mobile-computing/tablets/surface-pro-5-release-date-news-and-rumors-1316294

SMARTPHONE AND TABLET: MULTITASKING

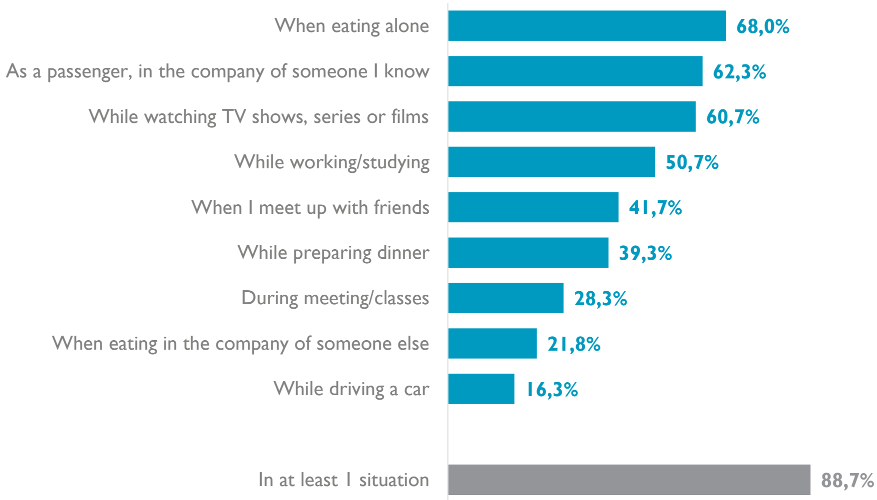
Due to their compact and mobile characteristics, smartphones and tablets are suitable for multitasking purposes in a broad range of contexts and situations. This multitasking can serve as an extension to the primary activity (for instance, looking up an actor's name while discussing a movie with friends), or just to pass time (for instance, when eating alone). But sometimes, this can lead to a feeling of distraction or irritation related to not being able to 'live in the moment' (for instance, when having dinner with friends or during a business meeting).

Almost 9 in 10 Flemings with a tablet or a smartphone claim to have used a mobile device during at least one of the described situations (88,7%). Most likely this is when eating alone (68,0%), as a passenger, in the company of someone you know (62,3%), or when watching a TV show, series or film (60,7%). Multitasking is least performed while driving a car (16,3%), when eating in the company of someone else (21,8%) or during business meetings/classes (28,3%).

In most situations, multitasking is not perceived as distracting by the majority of 'multitaskers', the only exception being when eating in the company of someone else. In that situation, the use of a smartphone or tablet is perceived as distracting by 53,0% of multitaskers. Over 4 in 10 multitaskers experience feelings of distraction when using a mobile device during meetings/classes (46,6%), while watching audiovisual content (45,7%) or while working/studying (43,8%). The least distraction is experienced while preparing dinner (24,0%), when eating alone (34,0%) and as a passenger in the company of someone you know (35,5%).

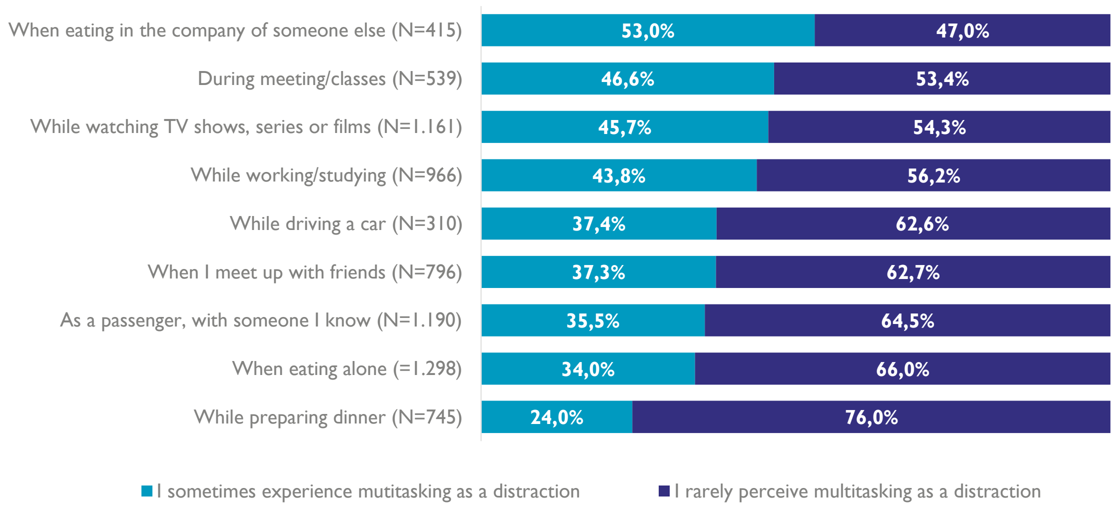
Only 37,3% of Flemings using a smartphone or tablet when meeting with friends perceive this as sometimes distracting. However, there are some remarkable differences between age groups. It seems that Flemings in their twenties (45,4%) and thirties (41,9%) in particular experience feelings of distraction when using a mobile device when meeting friends. Only 26,2% of 15-19 year olds claim to experience feelings of distraction in this situation. This is in line with the finding that people in their twenties and their thirties are struggling more to strike a balance in mobile media use that matches their busy 'offline life' (starting a family, building a career, running their own household, etc.) compared to teens (see General media chapter).

SMARTPHONE AND TABLET: MULTITASKING



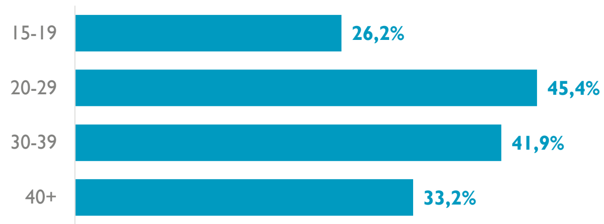
Devices graph 32: 'Do you use a smartphone or tablet in the following situations?' (of people owning a smartphone or tablet, N=1.935)

SMARTPHONE AND TABLET: MULTITASKING AND PERCEIVED DISTRACTION



Devices graph 33: 'Do you use a smartphone or tablet in the following situations?' - perceived distraction (of people multitasking in the given situations)

I SOMETIMES EXPERIENCE MULTITASKING AS A DISTRACTION WHEN I MEET UP WITH FRIENDS - SPLIT BY AGE GROUP



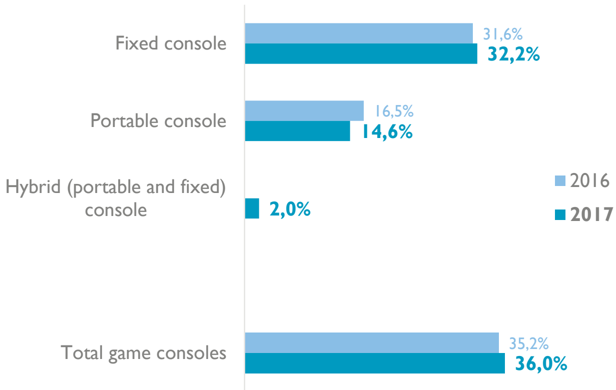
Devices graph 34: 'I sometimes experience multitasking as a distraction when I meet up with friends' - split by age group (among people multitasking when meeting friends, N=796)

GAME CONSOLES

Just like in previous years, the presence of game consoles in Flemish households remains stable. Over 1 in 3 Flemings report having a game console at home (36,0%). The fixed console, which is connected to a TV screen, is the most popular type of console (32,2%). 1 in 7 Flemings has a portable (handheld) game console (14,6%). In the first 4 months after launch, 2,0% of Flemings claim to have a Nintendo Switch at home. This is the first hybrid console, being both a portable and a fixed console connected to the TV.

People having a game console at home tend to be younger than 49 years old (with a culmination point among 15-19 year olds, where 83,5% claim to have a console at home), live in larger households, are most likely students and live in households with an average to high monthly net income (€3.000 or higher).

ADOPTION OF GAME CONSOLES: FIXED VS. HANDHELD CONSOLES



Devices graph 35: Adoption of game consoles (N=2.345)

PROFILING GAME CONSOLE ADOPTERS (N=844)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	37,3%	50,5%	103
Women	34,8%	49,5%	97
Age			
15-19	83,5%	14,3%	231
20-29	57,0%	21,9%	159
30-39	49,2%	19,9%	136
40-49	52,0%	22,9%	144
50-59	25,8%	12,5%	71
60-64	13,4%	2,8%	37
65+	8,2%	5,6%	23
Household members			
1	13,1%	8,8%	36
2	23,0%	21,1%	64
3	52,0%	20,1%	144
4	61,1%	30,9%	169
5	72,7%	13,8%	200
6	70,5%	2,5%	192
6+	50,3%	2,8%	140
Household situation			
Single without children	13,5%	9,3%	37
Single with child(ren)	49,8%	7,5%	139
Married/living together without children	19,6%	14,5%	54
Married/living together with child(ren)	55,0%	38,4%	152
Living with one or both parents	67,6%	27,7%	187
Living with others	33,6%	2,6%	93

Devices table 4: Profiling game console adopters (N=844)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 14,3% of all Flemings having access to a game console at home are between 15 and 19 years old. That age group only makes up 6,2% of the total population of Flanders aged 15 or more. The result is an index of 231, which clearly indicates that the youngest age segment is highly overrepresented among Flemings having a game console at home.

	Level of adoption	Profile	Index profile compared with population*
Degree			
No degree or primary education	19,3%	7,3%	54
Lower secondary	39,8%	21,6%	111
Higher secondary	39,4%	40,7%	109
Bachelor	38,3%	17,7%	107
Master	35,1%	12,7%	97
Occupation			
Student	70,0%	24,1%	194
White-collar worker	47,7%	29,3%	133
Blue-collar worker	39,7%	6,6%	110
Public servant/teacher	39,2%	11,1%	109
C-level	47,3%	5,5%	131
Self-employed	42,8%	4,2%	120
Liberal profession	40,9%	0,6%	120
House husband/wife	28,2%	1,9%	76
Unemployed	32,2%	8,6%	90
Retired	10,1%	8,2%	28
Net income			
€ 999 or less	22,7%	1,4%	64
€ 1.000 - € 1.499	20,6%	7,6%	57
€ 1.500 - € 1.999	24,1%	7,3%	66
€ 2.000 - € 2.999	31,4%	14,5%	87
€ 3.000 - € 3.999	44,5%	18,3%	124
€ 4.000 - € 4.999	47,8%	12,8%	133
€ 5.000 or more	50,4%	7,6%	141
Don't know	57,6%	18,1%	160
Prefer not to say	28,4%	12,4%	79

Devices table 4: Profiling game console adopters (N=844)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 24,0% of all Flemings having access to a game console at home are students. That segment makes up 12,4% of the total population of Flanders aged 15 or more. The result is an index of 194, which clearly indicates that the youngest age segment is highly overrepresented among Flemings having a game console at home.

VR HEADSETS & SMART WEARABLES

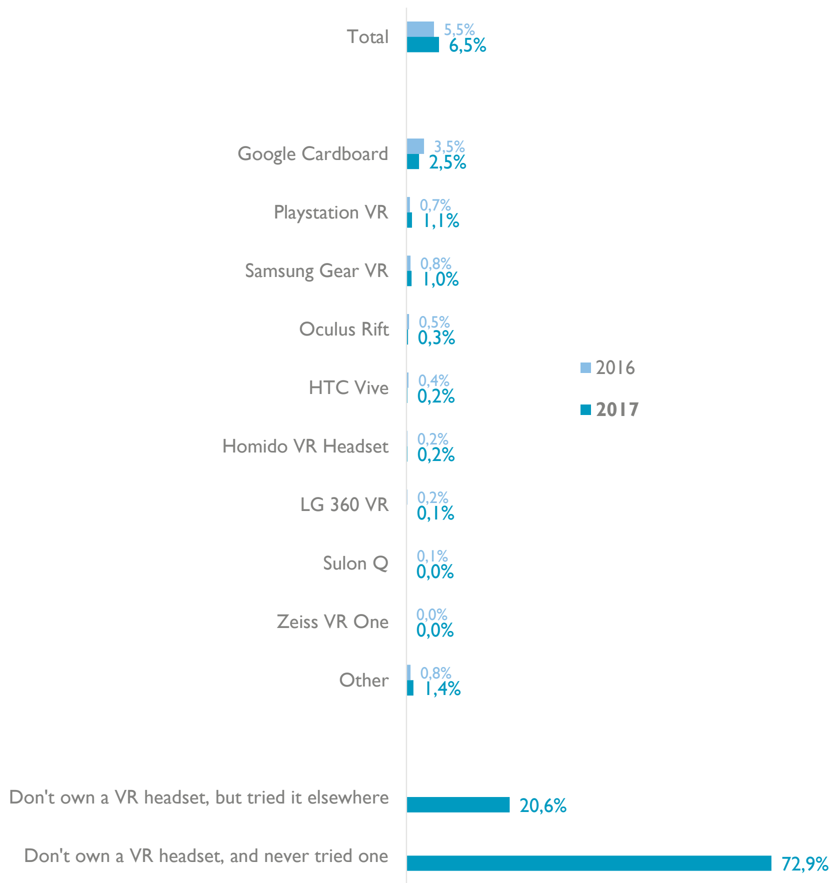
VR HEADSETS

We are still in the early innings when it comes to the uptake of virtual reality (VR) headsets, with 6,5% of the Flemish population having a VR headset at home (+1,0 percentage points). The most common brand of headset is not the much-discussed Oculus Rift or HTC Vive, but Google Cardboard (2,5%). That can be seen as the 'entry model' of VR technology, as it is the cheapest way to experience virtual reality. The user has to fold the cardboard into a headset, and slide a smartphone into it (which acts as both a screen and the processor). As you can obtain Google Cardboard for less than €20, it is also a popular marketing incentive to reward loyal customers or to attract new ones.

Except for Playstation VR (1,1%) and Samsung Gear VR (1,0%), the adoption rate of other brands of headsets has not yet crossed the threshold of 1%.

1 in 5 Flemings do not own a VR headset themselves, but have already experienced Virtual Reality elsewhere (for instance, at a friend's home, or a demonstration of a VR application. For over 7 in 10 Flemings, VR is still completely unknown territory (72,9%).

ADOPTION OF VR HEADSETS



Devices graph 36: 'Do you have a VR headset at home?' (N=2.345)

PROFILING VR HEADSET ADOPTERS (N=151)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	8,5%	64,2%	132
Women	4,5%	35,8%	70
Age			
15-19	10,9%	10,4%	168
20-29	9,7%	20,8%	151
30-39	10,4%	23,4%	160
40-49	8,7%	21,3%	134
50-59	5,1%	13,8%	79
60-64	1,2%	1,4%	18
65+	2,4%	9,1%	37
Household members			
1	4,5%	16,7%	69
2	4,0%	20,3%	61
3	8,6%	18,5%	132
4	9,2%	25,8%	141
5	12,7%	13,3%	193
6	7,0%	1,4%	108
6+	12,9%	4,0%	200
Household situation			
Single without children	4,1%	15,8%	63
Single with child(ren)	6,6%	5,5%	102
Married/living together without children	4,0%	16,7%	62
Married/living together with child(ren)	9,1%	35,4%	140
Living with one or both parents	9,9%	22,7%	153
Living with others	8,8%	3,9%	139

Devices table 5: Profiling VR headset adopters (N=151)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 64,2% of all Flemings with a VR headset at home are men, while only 48,8% of the total population of Flanders aged 15 or more is male. The result is an index of 132, which clearly indicates that men are overrepresented among Flemings having a VR headset at home.

	Level of adoption	Profile	Index profile compared with population*
Degree			
No degree or primary education	6,5%	13,6%	100
Lower secondary	4,9%	14,7%	75
Higher secondary	6,8%	38,9%	105
Bachelor	5,8%	14,9%	90
Master	8,9%	17,9%	137
Occupation			
Student	8,6%	16,5%	133
White-collar worker	6,9%	23,5%	106
Blue-collar worker	6,7%	6,2%	103
Public servant/teacher	6,8%	10,7%	105
C-level	14,7%	9,5%	226
Self-employed	16,0%	8,7%	249
Liberal profession	4,9%	0,4%	80
House husband/wife	0,0%	0,0%	0
Unemployed	8,5%	12,6%	131
Retired	2,6%	11,8%	41
Net income			
€ 999 or less	5,5%	1,9%	86
€ 1.000 - € 1.499	4,5%	9,2%	69
€ 1.500 - € 1.999	5,9%	10,0%	91
€ 2.000 - € 2.999	4,5%	11,5%	69
€ 3.000 - € 3.999	6,8%	15,5%	105
€ 4.000 - € 4.999	9,8%	14,6%	152
€ 5.000 or more	11,2%	9,4%	174
Don't know	9,1%	15,9%	141
Prefer not to say	5,0%	12,2%	78

Devices table 5: Profiling VR headset adopters (N=151)

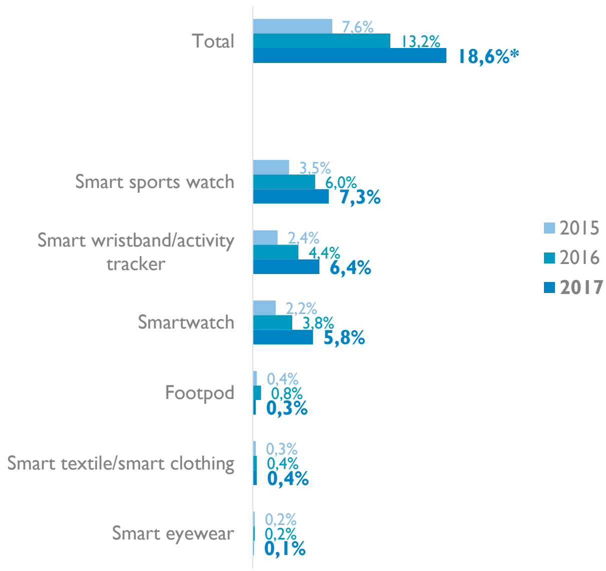
* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 17,9% of all Flemings with a VR headset at home hold a master's degree, while only 13,1% of the total population of Flanders aged 15 or more has a master's degree. The result is an index of 137, which clearly indicates that people with a master's degree are overrepresented among Flemings having a VR headset at home.

SMART WEARABLES

Just as last year, the uptake of smart wearables has increased significantly (+5,4 percentage points), with 18,6% of the Flemish population now owning such a device. It seems that the emergence of health and sports apps is driving the adoption of smart wearables, as smart sports watches (7,3% of the Flemish population, up 1,3 percentage points) and smart wristbands/activity trackers (6,4%, up 2,0 percentage points) remain the most popular types of smart wearables.

Adoption seems to be driven by highly-educated men with higher net incomes. The growth of smart wearables compared to last year seems to be mainly driven by people in their thirties (29,3%, an increase of 11,4 percentage points).

ADOPTION OF SMART WEARABLES



Devices graph 37: 'Do you own one of these types of smart wearables?' (N=2.345)

* Statistically significant change compared to the previous year, based on a chi-square test.

PROFILING SMART WEARABLE ADOPTERS (N=436)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	23,3%	61,2%	125
Women	14,1%	38,8%	76
Age			
15-19	20,4%	6,8%	110
20-29	24,7%	18,4%	133
30-39	29,3%	22,9%	157
40-49	21,5%	18,4%	116
50-59	18,6%	17,5%	100
60-64	14,7%	6,0%	79
65+	7,5%	9,9%	41
Household members			
1	12,6%	16,3%	67
2	15,8%	28,1%	85
3	23,5%	17,7%	126
4	28,2%	27,6%	151
5	19,4%	7,1%	103
6	19,8%	1,4%	108
6+	16,8%	1,8%	90
Household situation			
Single without children	12,4%	16,6%	67
Single with child(ren)	6,3%	1,8%	33
Married/living together without children	17,8%	25,6%	96
Married/living together with child(ren)	26,1%	35,4%	140
Living with one or both parents	23,3%	18,6%	126
Living with others	12,5%	1,9%	68

Devices table 6: Profiling smart wearable adopters (N=436)

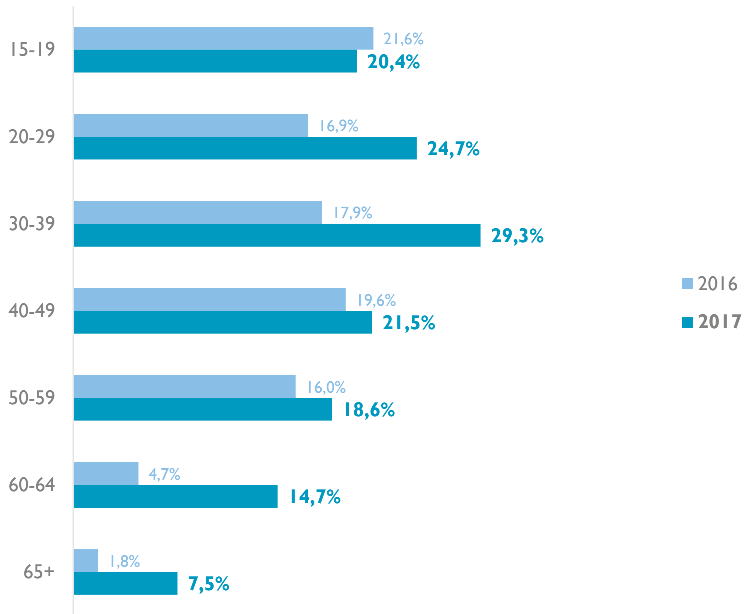
* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 61,2% of all Flemings with access to a smart wearable are men, while only 48,8% of the total population of Flanders aged 15 or more is male. The result is an index of 125, which clearly indicates that men are overrepresented among Flemings having a smart wearable.

	Level of adoption	Profile	Index profile compared with population*
Degree			
No degree or primary education	11,9%	8,7%	64
Lower secondary	12,3%	12,9%	66
Higher secondary	18,3%	36,6%	98
Bachelor	25,2%	22,6%	136
Master	27,4%	19,3%	147
Occupation			
Student	21,1%	14,1%	114
White-collar worker	24,7%	29,4%	133
Blue-collar worker	16,2%	5,2%	87
Public servant/teacher	23,0%	12,6%	124
C-level	44,2%	10,0%	238
Self-employed	34,0%	6,4%	183
Liberal profession	8,8%	0,2%	40
House husband/wife	18,4%	2,5%	100
Unemployed	11,4%	5,9%	61
Retired	8,8%	13,7%	47
Net income			
€ 999 or less	4,5%	0,5%	23
€ 1.000 - € 1.499	9,7%	6,9%	52
€ 1.500 - € 1.999	15,9%	9,4%	85
€ 2.000 - € 2.999	18,3%	16,4%	99
€ 3.000 - € 3.999	24,8%	19,7%	133
€ 4.000 - € 4.999	32,0%	16,6%	173
€ 5.000 or more	32,0%	9,3%	172
Don't know	18,6%	11,3%	100
Prefer not to say	11,6%	9,8%	62

Devices table 6: Profiling smart wearable adopters (N=436)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 19,3% of all Flemings with access to a smart wearable hold a master's degree, while only 13,1% of the total population of Flanders aged 15 or more have a master's degree. The result is an index of 147, which clearly indicates that people holding a master's degree are highly overrepresented among Flemings having a smart wearable.

ADOPTION OF SMART WEARABLES – GROWTH BY AGE GROUP



Devices graph 38: 'Do you own one of these types of smart wearables?' – growth by age group (N=2.345)

FREQUENCY OF DEVICE USE

The computer is still a widely used instrument in Flanders, as 71,4% claim to use a computer every day at home, and 47,6% use it every day at work[18]. 13,7% state to use a computer elsewhere on a daily basis (e.g., in a library, or at someone else's home). People owning a smartphone also tend to use it often. Only 8,7% of smartphone owners claim to use it less than daily for personal use. Almost 3 in 10 smartphone owners report using the smartphone at least 3 hours per day for private use (28,8%). In contrast to private use, the smartphone is still less-commonly established as a professional device compared to a laptop. Over half of smartphone owners claim never to use it for work-related purposes (54,8%). 36,1% use their smartphone on a daily basis for professional reasons.

In line with previous years, it seems that the tablet is a less-frequently used device. 42,2% of tablet owners use their tablets less than daily for private purposes; 28,0% even less than weekly. A tablet is rarely used for work-related tasks, as 87,8% of tablet owners use it less than daily for work, 78,1% claim to never or rarely use their tablet for work-related purposes.

FREQUENCY OF DEVICE USE

	Computer (N=2.345)			Smartphone (N=1.823)		Tablet (N=1.408)	
	At home	*At work*	*Elsewhere*	*Personal*	*Work-related*	*Personal*	*Work-related*
Never or rarely	13,0%	47,7%	65,5%	3,5%	54,8%	15,6%	78,1%
Less than weekly	5,4%	2,3%	12,5%	1,0%	4,0%	12,4%	4,9%
Less than daily	10,2%	2,4%	8,3%	4,2%	5,2%	14,2%	4,8%
Less than 1h/day	15,3%	4,3%	7,7%	26,7%	17,2%	22,9%	6,3%
1-3h/day	33,9%	6,9%	3,9%	35,8%	11,7%	25,0%	2,8%
3-5h/day	14,3%	7,6%	1,2%	15,3%	4,1%	7,2%	1,6%
5-8h/day	5,4%	21,1%	0,5%	6,7%	2,2%	1,1%	0,8%
More than 8h/day	2,4%	7,7%	0,5%	6,8%	0,8%	1,5%	0,8%

Devices graph 39: 'How frequently do you use these devices?'

FREQUENCY OF DEVICE USE - CONDENSED GRAPH

	Computer (N=2.345)			Smartphone (N=1.823)		Tablet (N=1.408)	
	At home	*At work*	*Elsewhere*	*Personal*	*Work-related*	*Personal*	*Work-related*
Less than daily	28,6%	52,4%	86,3%	8,7%	63,9%	42,2%	87,8%
Less than 3h/day	49,2%	11,2%	11,5%	62,5%	28,9%	47,9%	9,0%
More than 3h/day	22,2%	36,4%	2,2%	28,8%	7,1%	9,9%	3,2%

Devices graph 40: 'How frequently do you use these devices?' - condensed graph

18 It is important to note that digimeter data is based on self-reported data. In this way, these figures express the perception of the Flemish people on their use of media and technology. However, these figures give an indication of how important these devices are in the everyday lives of the Flemish population.

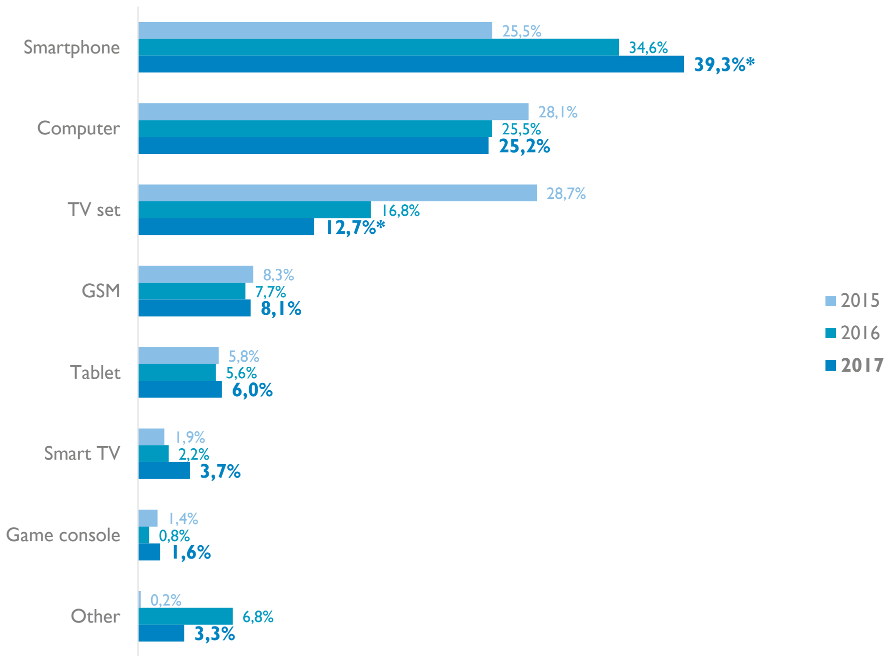
MOST INDISPENSABLE TECHNOLOGY

The smartphone remains, for an increasing number of Flemings, the most indispensable technology used for private purposes. 4 in 10 Flemings claim that they would miss the smartphone the most out of all their devices (39,3%). This is a significant increase compared to last year, when 1 in 3 Flemings indicated the smartphone as most indispensable device (+4,7 percentage points).

The TV set appears to be losing ground as the most indispensable device. Among Flemings aged 65+, the TV set is still the most indispensable device (31,6%), but this figure dropped significantly compared to last year (-11,0 percentage points) even in this age segment.

The computer is still by far the most indispensable device when it comes to work-related purposes. Half of the respondents choose the laptop as the most indispensable professional device, 25,9% preferred the desktop computer. The smartphone comes in at third place with 9,3%.

WHICH TECHNOLOGY WOULD YOU MISS THE MOST FOR PRIVATE PURPOSES?



Devices graph 41: 'Which of the following devices/technologies would you miss the most for private purposes?' (N=2.345)

* Statistically significant change compared to the previous year, based on a chi-square test.

WHICH TECHNOLOGY WOULD YOU MISS THE MOST FOR PRIVATE PURPOSES? TOP 5 SPLIT BY AGE

15-19				20-29			
	2015	2016	2017		2015	2016	2017
Smartphone	54,0%	54,7%	57,2%	Smartphone	42,3%	51,6%	55,4%
Computer	19,7%	21,7%	20,7%	Computer	38,9%	28,2%	27,5%
Tablet	3,1%	3,2%	6,2%	GSM	5,0%	6,5%	5,7%
GSM	5,0%	5,9%	4,8%	TV set	9,0%	3,1%	3,8%
Game console	3,9%	2,7%	4,1%	VR headset		0,5%	2,8%
Other	14,3%	11,8%	6,9%	Other	4,8%	10,1%	4,7%

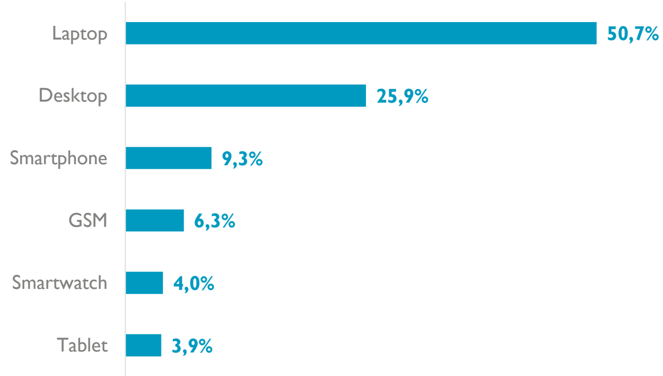
30-39				40-49			
	2015	2016	2017		2015	2016	2017
Smartphone	38,0%	54,2%	60,3%	Smartphone	35,0%	42,9%	53,7%
Computer	31,0%	23,8%	19,7%	Computer	22,5%	27,2%	23,2%
GSM	3,1%	4,5%	4,3%	TV set	21,5%	7,7%	6,2%
Tablet	5,8%	3,9%	4,0%	GSM	6,7%	8,6%	4,8%
TV set	18,7%	5,7%	3,7%	Tablet	11,7%	6,7%	4,5%
Other	3,4%	7,9%	8,0%	Other	2,6%	6,9%	7,6%

50-59				60-64			
	2015	2016	2017		2015	2016	2017
Smartphone	14,4%	28,6%	33,7%	Computer	30,8%	30,9%	37,4%
Computer	28,7%	26,2%	26,6%	Smartphone	10,9%	18,7%	21,9%
TV set	33,9%	14,5%	11,3%	TV set	40,5%	20,1%	14,8%
GSM	10,7%	9,0%	11,3%	GSM	10,2%	8,7%	10,3%
Tablet	9,4%	9,0%	7,3%	Tablet	4,6%	7,2%	7,7%
Other	2,9%	12,7%	9,8%	Other	3,0%	14,4%	7,7%

65+			
	2015	2016	2017
TV set	50,5%	42,6%	31,6%
Computer	24,7%	22,3%	25,0%
GSM	13,3%	9,0%	11,8%
Smartphone	4,8%	9,2%	11,2%
Tablet	2,8%	5,6%	9,7%
Other	3,9%	11,3%	10,7%

Devices table 7: 'Which of the following devices/technology would you miss the most for private purposes?' – top 5 split by age (N=2.345)

WHICH TECHNOLOGY WOULD YOU MISS THE MOST FOR WORK-RELATED PURPOSES?



Devices graph 42: 'Which of the following devices/technologies would you miss the most for work-related purposes?' (of people who did not indicate 'not applicable' on this question) (N=1.450)

COMBINATIONS OF SMART DEVICES

Only 5,4% of the Flemish population does not have any smart device (a device that can access the internet) at home. In fact, people tend to have multiple smart devices. Over 7 in 10 Flemings have a computer and a smartphone at home (75,3%). For 11,2%, these are the only smart devices at home; the other 64,1% also have other smart devices at home (e.g. 19,3% have a computer, a smartphone and a tablet at home).

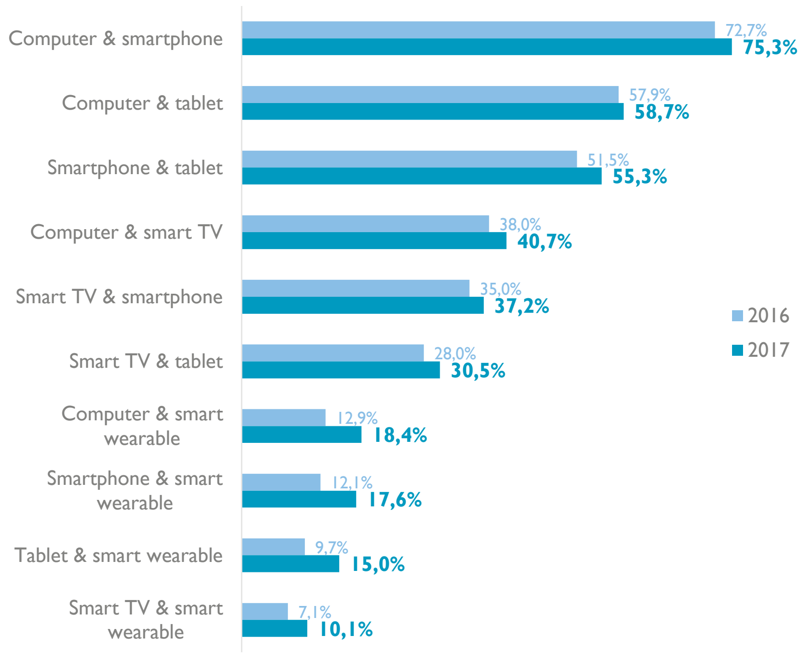
Overall, 29,7% of Flemings have 3 smart devices at home (-1,3 percentage points compared to 2016), with the combination 'computer – smartphone – tablet' as the most popular composition (19,3%). Almost 3 in 10 Flemings (28,7%) have 4 smart devices at home (2,8 percentage points more than in 2016), with the combination 'computer – smart TV – smartphone – tablet' as the most common composition (20,3%). 1 in 12 Flemings even have access to all 5 types of smart devices (8,1%); in 2016 this was 5,6%, and in 2015 this was 3,2%.

COMBINATIONS OF SMART DEVICES - DETAILED OVERVIEW

Computer	Smart TV	Smartphone	Tablet	Smart wearable	Description	%
0	0	0	0	0	None of these	5,4%
0	0	0	0	1	Only smart wearable	0,1%
0	0	0	1	0	Only tablet	0,5%
0	0	1	0	0	Only smartphone	1,5%
0	0	1	1	0	Smartphone and tablet	0,7%
0	1	0	0	0	Only smart TV	0,8%
0	1	1	0	0	Smart TV and smartphone	0,1%
0	1	1	1	0	Smart TV, smartphone and tablet	0,2%
1	0	0	0	0	Only computer	8,8%
1	0	0	0	1	Computer and smart wearable	0,3%
1	0	0	1	0	Computer and tablet	2,4%
1	0	0	1	1	Computer, tablet and smart wearable	0,1%
1	0	1	0	0	Computer and smartphone	11,2%
1	0	1	0	1	Computer, smartphone and smart wearable	1,3%
1	0	1	1	0	Computer, smartphone and tablet	19,3%
1	0	1	1	1	Computer, smartphone, tablet and smart wearable	6,6%
1	1	0	0	0	Computer and smart TV	1,8%
1	1	0	0	1	Computer, smart TV and smartvwearable	0,3%
1	1	0	1	0	Computer, smart TV and tablet	1,7%
1	1	0	1	1	Computer, smart TV, tablet and smart wearable	0,1%
1	1	1	0	0	Computer, smart TV, and smartphone	6,8%
1	1	1	0	1	Computer, smart TV, smartphone and smart wearable	1,6%
1	1	1	1	0	Computer, smart TV, smartphone and tablet	20,3%
1	1	1	1	1	All of these	8,1%

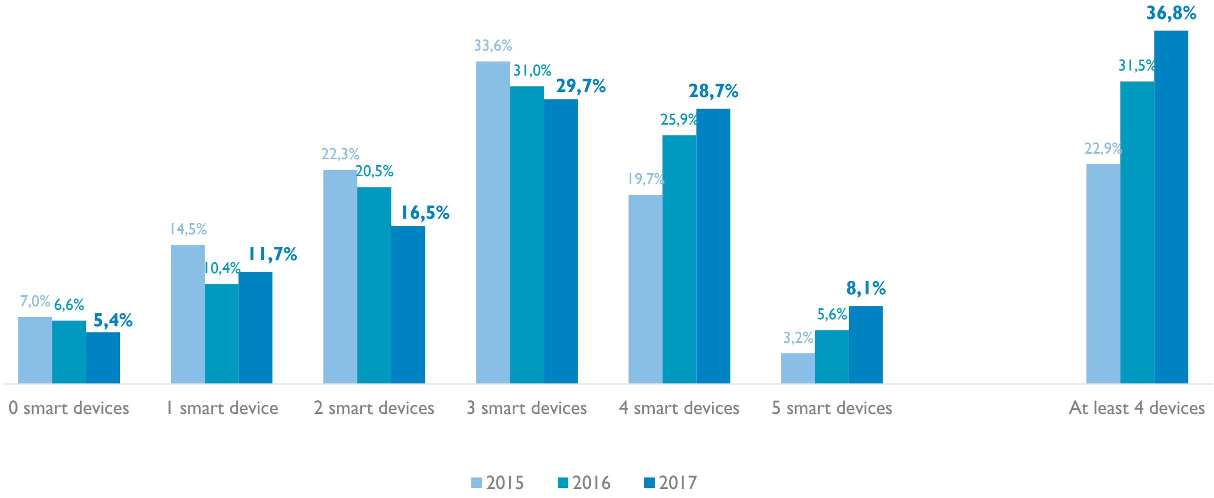
Devices table 8: Overview of combinations of smart devices in households (N=2.345)

COMBINATIONS OF SMART DEVICES



Devices graph 43: Combinations of smart devices (whether or not combined with other smart devices) (N=2.345)

NUMBER OF SMART DEVICES AT HOME



Devices graph 44: Number of smart devices at home (N=2.345)

DIGIMETER PROFILES

DEVICES & CONNECTIONS

DISRUPTOR (19,6%)

The Disruptor is the segment that has shifted the most from traditional media to digital media. They are less likely to have a digital TV subscription (64%, compared to 83% in the total population), but show a high adoption rate of Netflix (34%, compared to 21% in the total population). Disruptors are big fans of smartphones (high adoption rate (92%), most indispensable technology (48%), frequent multitaskers (95%)). Apart from the smartphone, Disruptors consider the laptop as a vital device (high adoption rate (91%), second most indispensable technology (30%)). Game consoles are highly prevalent within this segment (42%, compared to 36% in the total population).

MEDIA MANIAC (19,3%)

Media Maniacs show high adoption rates of both traditional and digital media. They combine digital TV subscriptions (92%) with Netflix accounts (45%). They own smartphones (100%), computers (99%), tablets (87%) and TV sets (99%; with 59% having a smart TV). They show high adoption rates of Apple products, as 51% have iPhones (compared to 34% in the total population) and 61% have iPads (compared to 53% in the total population). They also show the highest adoption rates of game consoles (63%, compared to 36% in the total population), smart wearables (32%, compared to 19% in the total population) and even VR headsets (14%, compared to 6% in the total population). The smartphone is by far the most indispensable device to them (65%).

AUGMENTED TRADITIONALIST (19,5%)

Just like Media Maniacs, Augmented Traditionalists tend to blend the adoption and use of both traditional and digital media. But in contrast to the former segment, the digital layer is more modest, compared to the extensive presence of traditional media. They do own a smartphone (95%), but are also likely to have a landline phone (69%). 92% have a subscription on digital TV, while 21% have access to Netflix. While 21% is at par with the total population, it is well below the availability of Netflix among Media Maniacs (45%) and Disruptors (34%). They are likely to multitask with their smartphones (95%). The smartphone (51%) and the computer (23%) are the most indispensable devices to Augmented Traditionalists.

STRUGGLER (22,7%)

Strugglers are mainly focused on traditional media. They have digital TV subscriptions (90%), but only 4% have access to Netflix. They are more likely to have landline connections (81%) than smartphones (76%). That said, with 3 in 4 having smartphones, 98% having computers and 61% having tablets, it is clear that digital media is present in their media lives (albeit their presence is less pronounced compared with the three previous segments). Computers (35%), smartphones (24%) and TV sets (17%) are choosen as technologies that they cannot do without.

RESISTORS (18,9%)

Digital media are largely unknown territories to Resistors. Only 73% of them claim to have an internet connection at home, which is by far the lowest rate across all segments. The adoption rates of devices such as the smart TV (21%), computer (58%), smartphone (26%), tablet (18%) and game consoles (14%) are significantly lower compared to all other segments. It is the only segment where the regular cell phone (66%) is still more prevalent than the smartphone (26%). To this segment, traditional media are key. The TV set is by far the most indispensable device within their households (32%), with the regular cell phone in second place (22%).

TV

	TV set	Only TV tube	Smart TV	Netflix	Digital TV subscription
Disruptor	85%	7%	42%	34%	64%
Media Maniac	99%	3%	59%	45%	92%
Augmented Traditionalist	99%	4%	47%	21%	92%
Struggler	99%	8%	41%	4%	90%
Resistor	89%	16%	21%	2%	75%

Computer

	Computer (desktop or laptop)	Desktop	Laptop	Internet connection
Disruptor	98%	47%	91%	98%
Media Maniac	99%	47%	96%	100%
Augmented Traditionalist	98%	41%	90%	99%
Struggler	98%	51%	81%	98%
Resistor	58%	22%	43%	73%

Telephony

	Landline	Regular cell phone (GSM)	Smartphone	Smartphone: iOS *(filtered on who owns a smartphone)*	Smartphone: Android *(filtered on who owns a smartphone)*	Multitasking
Disruptor	47%	25%	92%	36%	57%	95%
Media Maniac	61%	12%	100%	51%	46%	98%
Augmented Traditionalist	69%	16%	95%	31%	60%	95%
Struggler	81%	38%	76%	21%	59%	78%
Resistor	62%	66%	26%	16%	67%	57%

Tablet

	Tablet	Tablet: iOS *(filtered on who owns a tablet)*	Tablet: Android *(filtered on who owns a tablet)*
Disruptor	64%	55%	40%
Media Maniac	87%	61%	33%
Augmented Traditionalist	70%	47%	44%
Struggler	61%	47%	41%
Resistor	18%	50%	32%

Game console

	Game console *(Fixed, portable or hybrid)*	Fixed game console *(connected to TV)*	Portable game console	Hybrid game console *(Nintendo Switch)*
Disruptor	47%	42%	20%	3%
Media Maniac	63%	59%	30%	4%
Augmented Traditionalist	41%	38%	17%	2%
Struggler	17%	15%	6%	0%
Resistor	14%	10%	2%	1%

VR Headset and smart wearables

	Owns VR headset	Experienced VR *(no ownership)*	No VR experience	Smart wearable
Disruptor	8%	23%	69%	20%
Media Maniac	14%	32%	54%	32%
Augmented Traditionalist	7%	21%	73%	23%
Struggler	1%	19%	80%	14%
Resistor	4%	9%	88%	5%

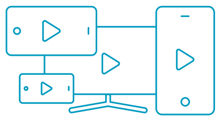
Most indispensable technology

	Smartphone	Regular cell phone (GSM)	Tablet	Computer	TV set
Disruptor	48%	6%	4%	30%	4%
Media Maniac	65%	3%	6%	17%	2%
Augmented Traditionalist	51%	3%	7%	23%	6%
Struggler	24%	5%	8%	35%	17%
Resistor	8%	22%	5%	18%	32%

CHAPTER 02

TV AND VIDEO

IMEC.DIGIMETER INFOGRAPHIC

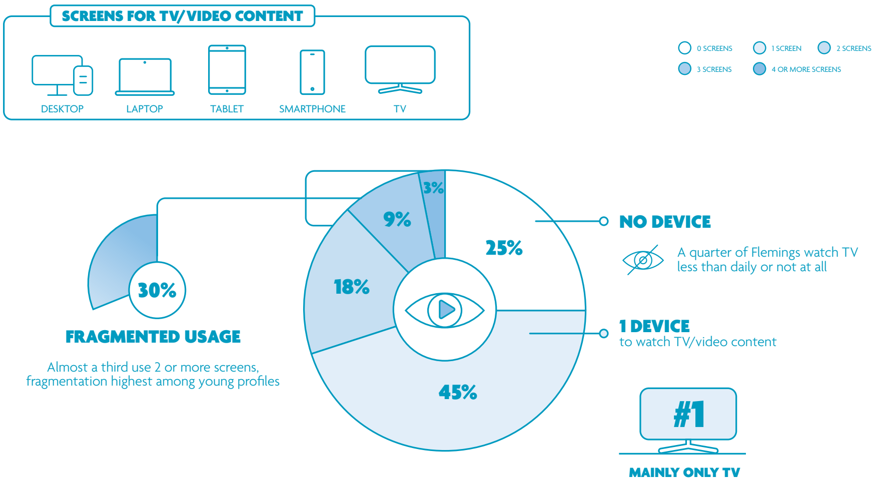


TV & VIDEO

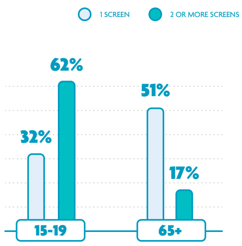
Younger segments: exit TV, enter online video

SCREENS USED TO WATCH DAILY TV/VIDEO CONTENT

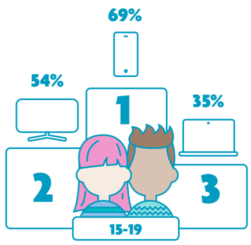
The younger the Fleming, the more screens used



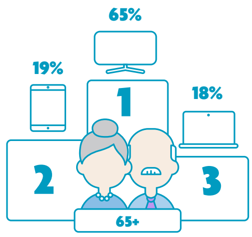
DAILY USAGE OF 2 OR MORE SCREENS DECREASES WITH AGE



TEENAGERS PREFER THE SMARTPHONE AS DAILY SCREEN

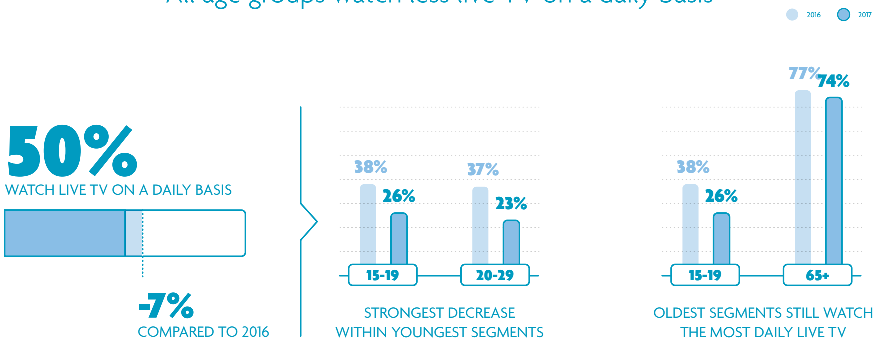


FLEMINGS 65+ MOST DISTINCT FANS OF TV SCREEN

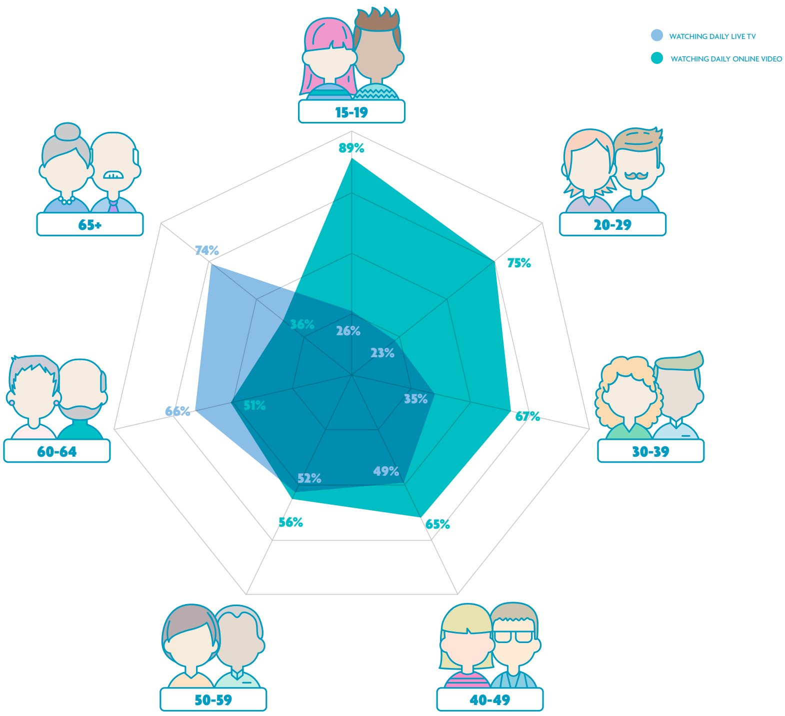


TRADITIONAL LIVE TV LESS POPULAR

All age groups watch less live TV on a daily basis

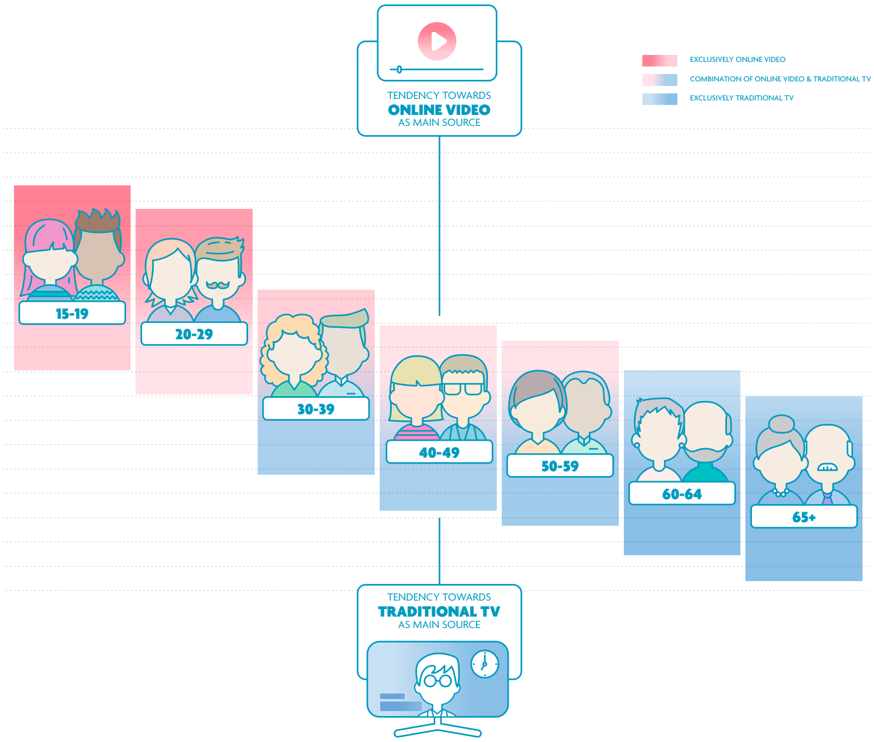


WATCHING TRADITIONAL LIVE TV VS. WATCHING ONLINE VIDEO



ONLINE VIDEO VS. TRADITIONAL TV

Younger age segments more likely to watch online video exclusively

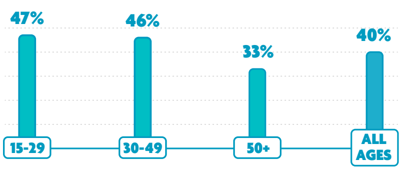


STATEMENTS

Virtual reality, satisfaction & video-on-demand

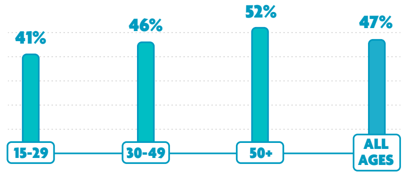
VIRTUAL REALITY

"Within 5 years, VR will be an important type of entertainment"



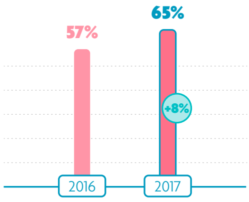
SATISFACTION

"I am satisfied with the programming on Flemish TV stations"



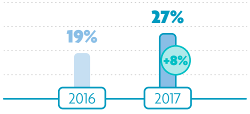
NETFLIX SATISFACTION

I am satisfied with the offering of films and series on Netflix



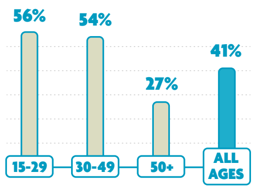
VIDEO-ON-DEMAND

"To me, video-on-demand services such as Netflix are substitutes for traditional TV stations"



WILLING TO PAY

"I am willing to pay for films and series I really like"



TV AND VIDEO

WATCHING TV AND VIDEO CONTENT

SCREENS FOR WATCHING VIDEO CONTENT

The television set remains the most important screen for watching video and television content[19]. 61,2% of Flemings with access to a TV set at home indicate that they use the TV screen on a daily basis to watch video content. However, this is significantly lower compared to last year, when this was 66,4%. Even among older age groups, the daily use of a TV set seems to be regressing. The smartphone comes in at second place, with 30,7% of Flemish smartphone owners watching video content on a daily basis on their mobile phones. Moreover, just as last year, the smartphone seems to have overtaken the TV set within the youngest age segment. 69,3% of 15-19 year old Flemings owning a smartphone watch video content on that device on a daily basis (+10,3 percentage points), which is clearly more than the 54,2% of 15-19 year old Flemings watching video content on the TV screen on a daily basis (-1,5 percentage points). In the other age groups, there is still a clear preference for the TV set. Among Flemings aged 50 years and older, the tablet is as important as the smartphone when it comes to screens for watching video content. Not surprisingly, most Flemings with a smartwatch indicate that they never watch video content on that device (89,5%).

When we take a closer look to the screens most commonly used on a daily basis to watch TV or video content (TV set, smart-phone, laptop, desktop and tablet), we notice that 34,4% of the Flemish population only uses a TV set every day to watch video content. Among Flemings aged 65+, this represents 45,5% of the population segment. We can conclude that among the oldest age groups, the TV set still plays a central role when it comes to watching TV and video content on a daily basis. Among the youngest age group (15-19 years old), only 9,6% claim to be using the TV set as the single screen to watch video content on a daily basis.

As we saw earlier, the smartphone (69,3%) is a more commonly used device for watching video content on a daily basis than the TV set (54,2%) among the youngest age segment. However, that doesn't mean that 15-19 year olds only use the smartphone on a daily basis to watch video. Only 11,0% of 15-19 year old Flemings claim to only use the smartphone every day to watch video content; the other 58,3% use one or more other devices as well on a daily basis to watch video content (for instance, 21,9% use both a smartphone and a TV set on a daily basis to watch video content). In fact, the youngest age groups daily consume video content on multiple screens. This is illustrated in graph 4, where 61,6% of 15-19 year old Flemings use at least 2 screens on a daily basis to watch video content. Within the total population, this is only the case for 29,6%. 1 in 5 15-19 year old Flemings even use at least 3 out of the 5 selected screens to watch video content every day (19,9%, compared to 11,3% of the total population).

FREQUENCY OF WATCHING VIDEO CONTENT (TV PROGRAMS OR OTHER VIDEO) ON THE FOLLOWING SCREENS

	Television set (N=2.213)	Laptop (N=1.887)	Desktop (N=981)	Smartphone (N=1.823)	Tablet (N=1.408)	Smartwatch (N=135)
Never	8,4%	22,8%	39,9%	27,1%	24,9%	89,0%
Rarely	10,3%	24,3%	22,2%	20,5%	28,6%	5,1%
Monthly	3,8%	7,5%	5,7%	5,5%	8,9%	1,5%
Weekly	16,2%	21,7%	15,4%	16,2%	20,9%	1,5%
Daily	61,2%	23,8%	16,8%	30,7%	16,8%	2,9%

Video graph 1: 'How frequently do you watch video content on the following screens?' (filtered by who has access to these screens within their household)

19 In this chapter, the term 'video' refers to the full range of video content: TV programs, series, movies, music videos, user-generated content, news videos, etc.

DAILY USE OF FOLLOWING SCREENS TO WATCH VIDEO CONTENT - SPLIT BY AGE GROUP

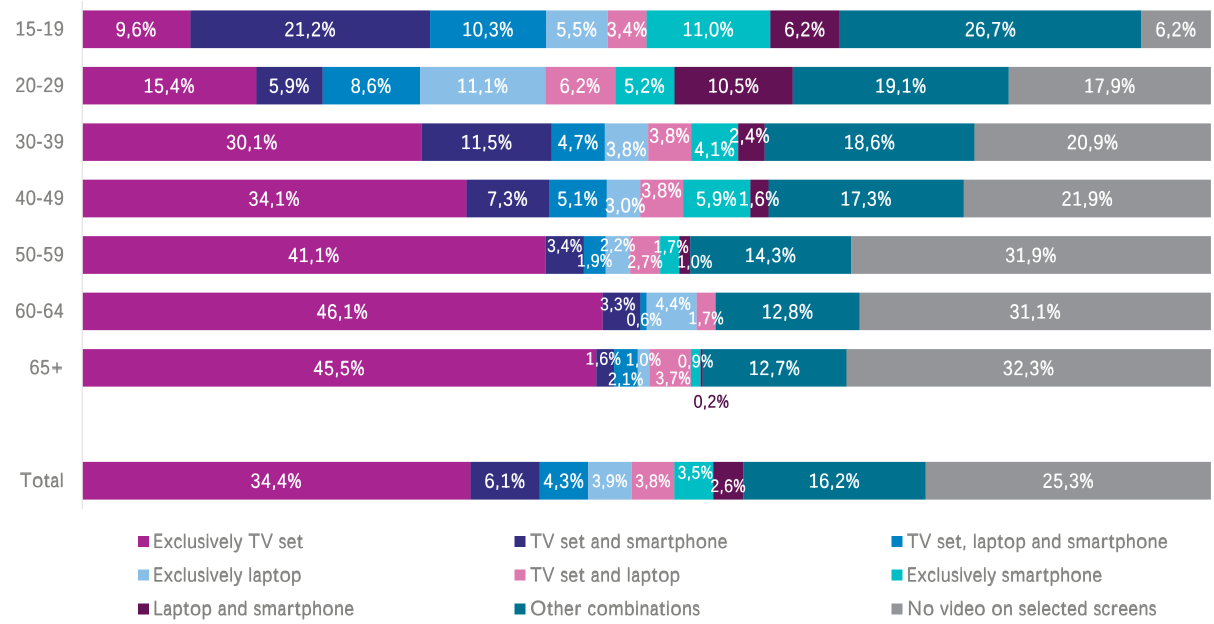
	15-19		20-29		30-39	
	2016	2017	2016	2017	2016	2017
Television set	55,7%	54,2%	62,7%	50,0%	69,4%	65,7%
Laptop	29,5%	34,8%	40,9%	43,8%	26,2%	23,8%
Desktop	14,8%	16,0%	13,7%	24,8%	20,6%	23,9%
Smartphone	59,0%	69,3%	46,9%	42,9%	42,2%	38,0%
Tablet	17,5%	23,9%	13,8%	14,9%	25,5%	16,9%

	40-49		50-59		60-64	
	2016	2017	2016	2017	2016	2017
Television set	62,8%	65,3%	65,7%	59,5%	72,7%	60,5%
Laptop	18,8%	22,2%	16,7%	13,3%	14,3%	12,9%
Desktop	12,9%	19,2%	12,3%	13,4%	11,2%	7,6%
Smartphone	26,8%	31,7%	19,2%	13,5%	12,0%	13,0%
Tablet	24,2%	16,8%	17,5%	13,4%	27,2%	17,9%

	65+		Total	
	2016	2017	2016	2017
Television set	70,9%	65,2%	66,4%	61,2%
Laptop	17,6%	17,8%	23,7%	23,8%
Desktop	15,1%	13,4%	14,3%	16,8%
Smartphone	22,0%	17,0%	33,1%	30,7%
Tablet	15,1%	18,5%	19,8%	16,8%

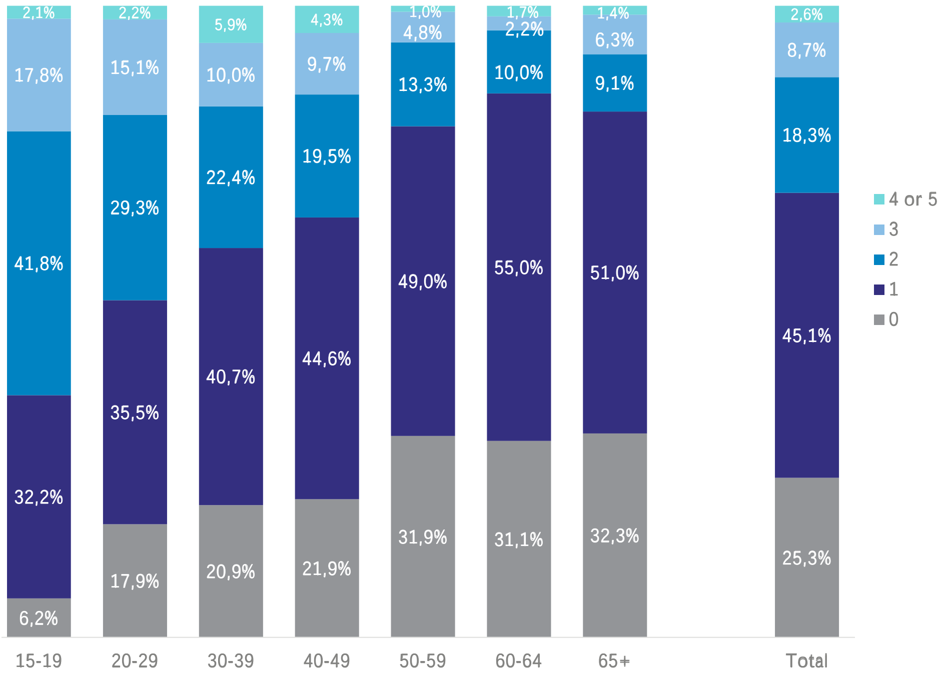
Video graph 2: Daily use of screens to watch video content - split by age group

COMBINATIONS OF SCREENS USED ON A DAILY BASIS TO WATCH VIDEO CONTENT - SPLIT BY AGE GROUP



Video graph 3: Combinations of screens used on a daily basis to watch video content (selected screens: TV set, laptop, desktop, smartphone and tablet) - split by age group (N=2.345)

NUMBER OF SCREENS USED ON A DAILY BASIS TO WATCH VIDEO CONTENT - SPLIT BY AGE GROUP



Video graph 4: Number of screens used on a daily basis to watch video content (selected screens: TV set, laptop, desktop, smartphone and tablet) - split by age group (N=2.345)

WAYS TO WATCH TV CONTENT[20]

The most common way to watch TV content remains linear/live programming (watching the program at the time it is aired). 49,8% of Flemish people watch live programming on a daily basis, which is significantly less than a year ago (56,6%). Moreover, the proportion of the population watching linear programming seems to be positively correlated with ascending age: the older the age group, the larger the proportion that watches live television programming. The largest decrease in watching live TV on a daily basis is situated in the youngest segments (15-19: -11,6 percentage points; 20-29: -13,8 percentage points), and, more remarkably, among people in their fifties (-14,4 percentage points).

Timeshifted viewing (delayed viewing, e.g. watching recorded TV programs) remains stable at about 3 in 10 Flemings watching TV some time after it has been aired (27,0%, -2,4 percentage points). Unlike watching live television, there seems to be no clear relationship with age.

As we concluded in the Devices & Connections chapter, 13,0% of Flemings have access to a Play or Play More account by Telenet. For most people having a subscription to this service, this is not yet a daily habit, as 1 in 5 subscribed Flemings uses it on a daily basis (19,6%).

13,1% of the Flemish population claims to rent series and films per item (pay-per-view) on a monthly basis, while 20,9% watch DVDs every month. People in their thirties in particular seem to frequently enjoy watching content in these modes (pay-per-view: 22,9%; DVD: 32,5%).

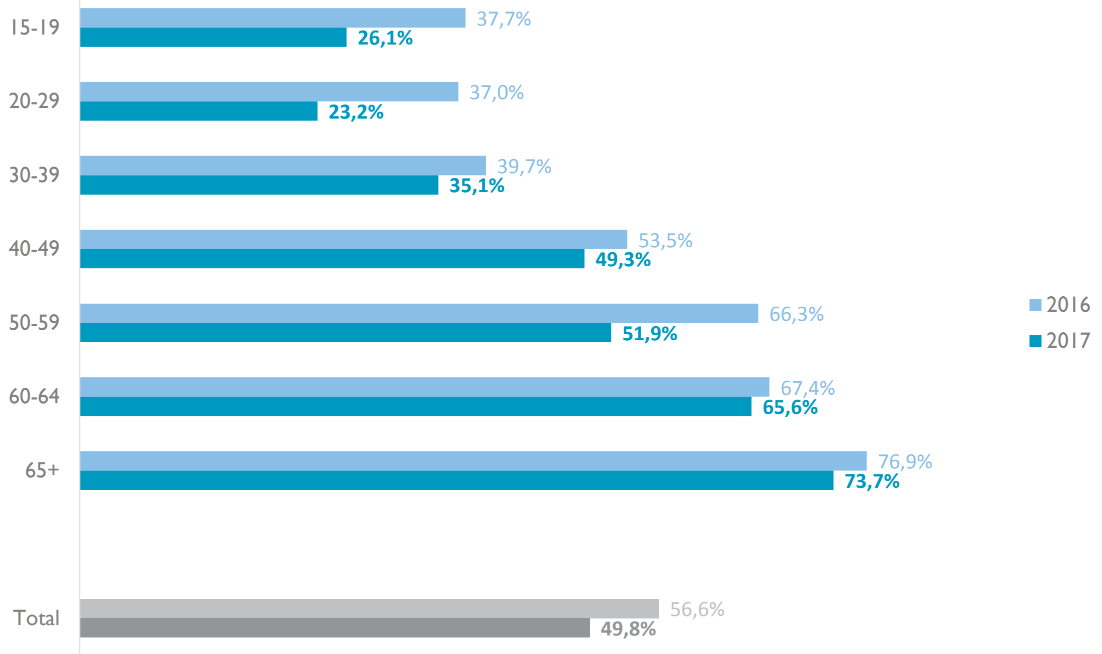
20 As this is self-reported data, this merely reflects the perception of the respondents. Digimeter does not make assumptions about time spent watching TV. Other studies like CIM Audimetrie are designed to address that topic.

WAYS TO WATCH TV CONTENT**

	Ever			Monthly			Daily		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
Live / linear	93,9%	94,3%	86,6%*	81,9%	82,6%	73,2%*	60,0%	56,6%	49,8%*
Timeshifted viewing	77,9%	80,6%	75,2%*	69,2%	73,5%	64,6%*	29,6%	29,4%	27,0%
Pay-per-view for series and films		43,6%	38,3%		13,5%	13,1%		1,3%	1,3%
Play / Play More (Telenet) *(of Flemings having access to a Play / Play More account, N=304 or 13,0% of population)*		86,6%	79,5%*		71,4%	67,1%*		17,2%	19,6%
DVDs	60,0%	56,9%	53,0%*	23,2%	21,9%	20,9%	1,3%	2,4%	2,1%
Play Sports (Telenet) *(of Flemings having access to a Play Sports account, N=131 or 5,6% of the population)*		76,9%	72,7%*		72,0%	58,6%*		16,4%	14,6%

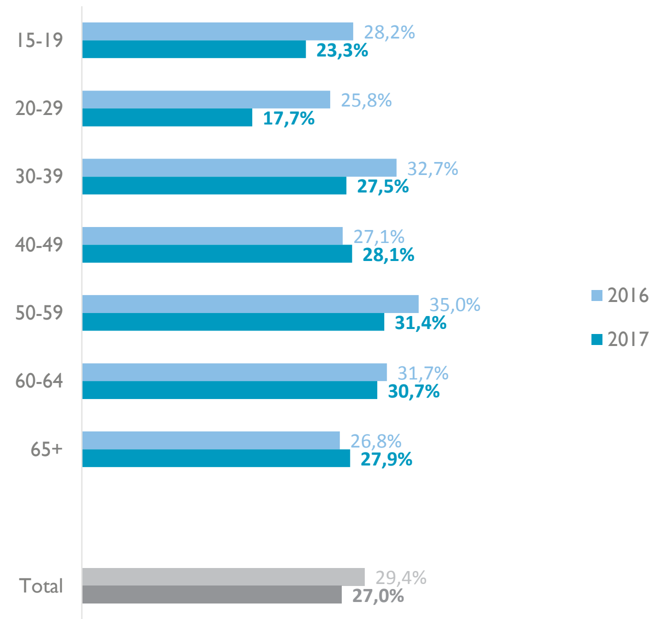
Video table 1: 'How do you watch TV content?' (N=2.345, except where indicated otherwise)
* Statistically significant change compared to the previous year, based on a chi-square test.
** Due to the low sample size, Proximus Movies & Series Pass and Proximus 11/11+ were excluded from analysis.

WATCHING LIVE TV ON A DAILY BASIS - SPLIT BY AGE GROUP



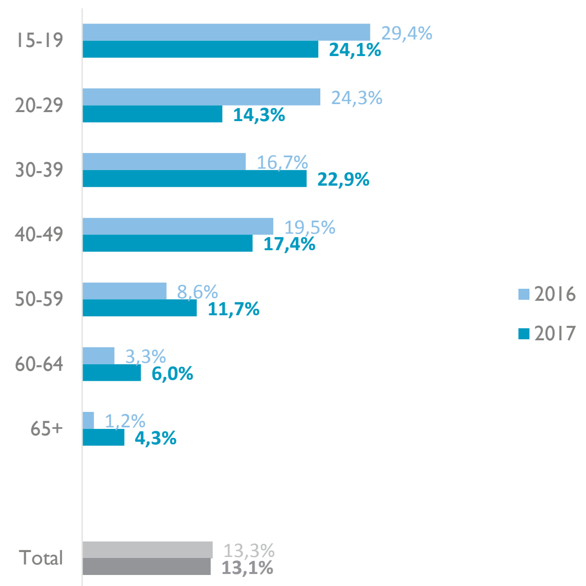
Video graph 5: Watching live TV on a daily basis - split by age group (N=2.345)

WATCHING TIMESHIFTED TV ON A DAILY BASIS - SPLIT BY AGE GROUP

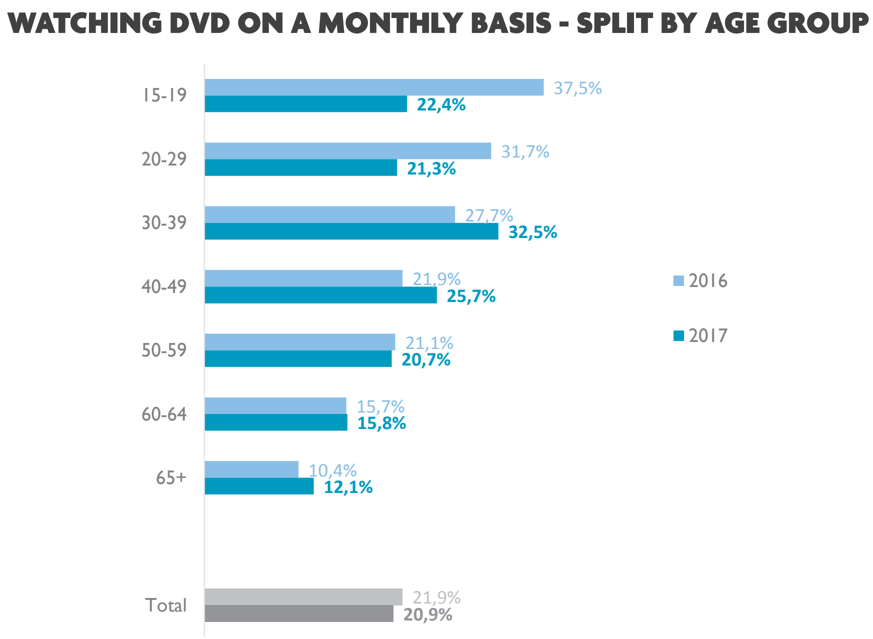


Video graph 6: Watching timeshifted TV on a daily basis - split by age group (N=2.345)

WATCHING PAY-PER-VIEW ON A MONTHLY BASIS - SPLIT BY AGE GROUP



Video graph 7: Watching pay-per-view TV on a monthly basis - split by age group (N=2.345)



Video graph 8: Watching DVD on a monthly basis - split by age group (N=2.345)

FREQUENCY OF WATCHING ONLINE VIDEO

Almost 2 in 3 Flemings watch videos on YouTube on a monthly basis (63,3%). Younger generations in particular are loyal users of this platform, with at least 80% of Flemings younger than 40 years old using YouTube at least once every month.

However, on a daily basis, YouTube is not the most popular online video platform. Social media (37,8%, +3,1 percentage points) and news sites (29,6%, +1,3 percentage points) seem to be daily sources of videos for a larger segment of Flemings than YouTube (20,7%, -1,7 percentage points).

People with Netflix accounts tend to use the service quite often. 1 in 3 Netflix users watch Netflix content on a daily basis (36,6%, +2,4 percentage points), and 90,9% use it at least once a month (+0,7 percentage points). These high figures can be partly explained by the flexible subscription formula of Netflix. Subscribers can easily put their Netflix subscriptions on hold, and just as easily resume subscriptions when intending to (binge) view Netflix content again. When we disregard the filter on having access to a Netflix account, we can conclude that 7,9% of the Flemish population watches Netflix every day (+1,6 percentage points), while 19,9% watches Netflix on a monthly basis (+2,7 percentage points).

The efforts of Flemish broadcasters to invest in online platforms and mobile applications as alternative distribution channels for their content seem to be paying off, as 1 in 3 Flemings use these at least once every month (34,0%, +2,3 percentage points). Younger segments in particular seem to enjoy this, as over 4 in 10 of 15-39 year olds report using those online platforms on a monthly basis.

Despite the wide coverage these platforms generate on news media, illegal distribution platforms such as Popcorn Time and torrent websites seem to remain quite niche. Only 5,9% of the Flemish population uses Popcorn Time at least on a monthly basis, and 9,3% has ever used this platform. One of the reasons for this low uptake of Popcorn Time could be due to the fear of sanctions when one is caught using the platform. Another reason could have a more practical nature: as Popcorn Time is an illegal platform, it has been taken down several times by various governments. As a result, the service has had to change its domain quite a few times to remain in business, making it difficult to keep track of. However, this doesn't appear to deter the youngest generation, as 25,9% of Flemings aged 15-19 years old claim to use Popcorn Time every month (-1,9 percentage points). Torrent sites seem to be popular mainly with the younger age groups. It is remarkable that downloading content from torrent sites seems to be more popular among 20-29 year olds, while 15-19 year olds appear to prefer streaming content via Popcorn Time.

FREQUENCY OF WATCHING ONLINE VIDEO

	Ever		Monthly		Daily	
	2016	2017	2016	2017	2016	2017
YouTube	80,1%	81,3%	64,5%	63,3%	22,4%	20,7%
Vimeo	25,7%	21,9%*	11,4%	8,9%	0,9%	0,6%
Social media	65,2%	66,5%	56,1%	57,4%	34,7%	37,8%*
News sites	69,9%	71,5%	58,2%	59,6%	28,3%	29,6%
Website / app of TV station (e.g. VTM.be) or provider (e.g. Yelo Play app by Telenet)	53,6%	54,4%	31,7%	34,0%	9,0%	10,1%
Twitch (gaming videos)		7,5%		4,0%		1,1%
Stievie Free	9,6%	8,7%	4,3%	4,6%	0,7%	0,8%
Popcorn Time	11,1%	9,3%	5,9%	5,9%	0,8%	1,0%
Stremio	3,5%	2,4%	1,5%	1,6%	0,2%	0,3%
Torrent sites	15,0%	12,7%	9,5%	8,1%	1,4%	1,7%
Netflix *(total population)*	18,3%	22,1%*	17,2%	19,9%*	6,3%	7,9%
Netflix *(filtered by having access to a Netflix subscription, N=485 or 20,7% of the total population)*	96,5%	95,7%	90,2%	90,9%	34,2%	36,6%

Video table 2: Frequency of watching online video via listed platforms (N=2.345, except where indicated otherwise)

WATCHING ONLINE VIDEO (MONTHLY BASIS) - SPLIT BY AGE

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
YouTube	94,8%	89,3%	84,6%	73,4%	59,7%	47,1%	28,8%	63,3%
Vimeo	7,6%	12,7%	15,8%	15,6%	5,4%	8,2%	1,1%	8,9%
Social media	81,5%	83,7%	78,4%	69,6%	52,6%	40,3%	24,8%	57,4%
Newssites	58,6%	70,0%	71,9%	71,2%	63,2%	60,1%	36,4%	59,6%
Website / app of TV station (e.g. VTM.be, Canvas.be,...)	41,5%	45,9%	42,0%	39,3%	37,3%	24,2%	17,7%	34,0%
Twitch (gaming videos)	18,7%	7,4%	6,8%	3,4%	0,7%	0,6%	0,7%	4,0%
Stievie Free	4,2%	5,9%	7,1%	6,9%	4,2%	1,0%	2,6%	4,6%
Popcorn Time	25,9%	14,7%	6,6%	5,0%	2,3%	0,6%	0,3%	5,9%
Stremio	3,6%	5,3%	2,0%	1,2%	0,6%	0,0%	0,3%	1,6%
Torrent sites	13,3%	25,3%	14,7%	6,0%	2,8%	1,2%	0,5%	8,1%
Netflix *(total population)*	47,2%	36,5%	37,2%	21,5%	13,8%	3,7%	1,8%	19,9%
Netflix *(filtered by having Netflix subscription, N=485 or 20,7% of the total population)*	97,9%	94,0%	94,9%	89,2%	79,8%	74,2%	75,1%	90,9%

Video table 3: Watching online video (monthly basis) - split by age (N=2.345, except where indicated otherwise)

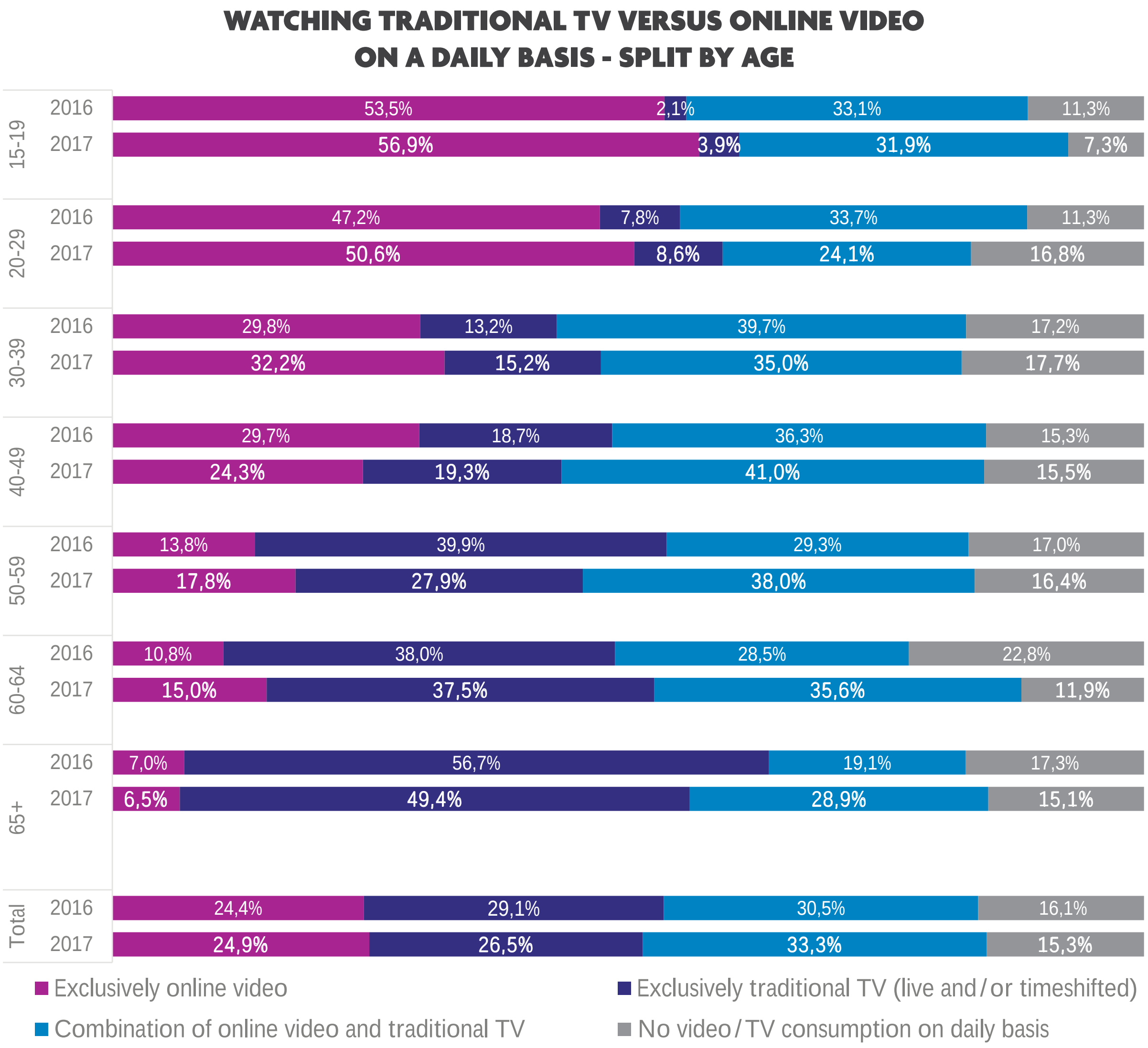
TRADITIONAL TV VERSUS ONLINE VIDEO

84,7% of the Flemish population watches TV or online video content on a daily basis. Just as last year, a quarter of the population does consume video every day, but only online video, not traditional TV (24,9%, +0,5 percentage points). In contrast, 26,5% of Flemings exclusively consume traditional TV content (either through live or timeshifted viewing) on a daily basis, which is 2,6 percentage points fewer compared to last year. 1 in 3 Flemings combines online video with traditional TV every day (33,3%, +2,8 percentage points).

There are some remarkable age differences. The share of people only watching online video on a daily basis is highest among the youngest age groups, and is even increasing slightly (56,9%, +3,4 percentage points among 15-19 year old Flemings and 50,6%, +3,4 percentage points among 20-29 year old Flemings). As such, online video is (even more than last year) the most common way within those segments to watch video content on a daily basis.

Last year, the share of people only watching traditional TV (either live or timeshifted) on a daily basis was highest among Flemings aged 50+. In 2017, this is merely true for Flemings aged 60+ (37,5% among 60-64 year old Flemings, and 49,4% among Flemings aged 65+). For people in their fifties, a higher share now claims to watch a combination of traditional and online video on a daily basis (38,0%, +8,7 percentage points) than exclusively traditional TV (27,9%, -12,0 percentage points). Moreover, even among Flemings aged 65+, the share of Flemings exclusively watching traditional TV is declining (49,4%, -7,3 percentage points).

Flemings aged 30-59 years old are on the intersection of online video and traditional TV. They show the highest share of combining both online video and traditional TV on a daily basis (35,0%, -4,7 percentage points among 30-39 year old Flemings, 41,0%, +4,7 percentage points among 40-49 year olds and 38,0%, +8,7 percentage points among 50-59 year olds).



Video graph 9: Watching traditional TV versus online video on a daily basis - split by age group (N=2.345)

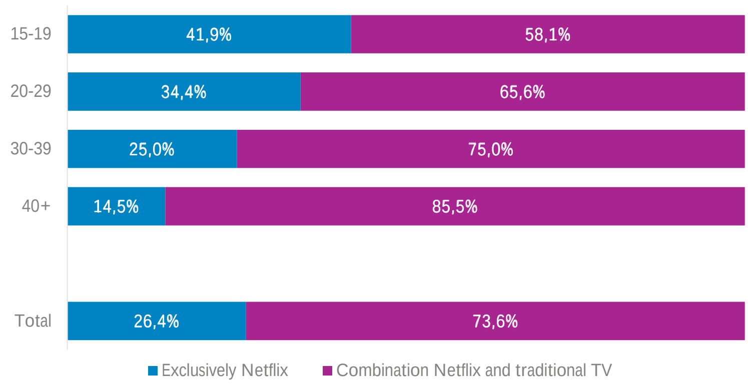
NETFLIX: ON TOP OF OR INSTEAD OF TRADITIONAL TV?

20,7% of Flemings have access to a Netflix account (see Devices & Connections chapter). Among those Netflix users, 84,2% watch Netflix content on a weekly basis (otherwise put: 17,4% of the total Flemish population watches Netflix on a weekly basis). How does this relate to watching traditional TV content (through live TV or timeshifted TV)? Are Netflix users ditching traditional TV in favor of Netflix, or do they combine both Netflix and traditional TV?

In general, 73,6% of the Flemings who use Netflix on a weekly basis also watch TV content every week (either through live TV or timeshifted viewing). To them, Netflix is an addition to the content of TV broadcasters.

However, this means that for a quarter of Flemings who use Netflix every week, Netflix is considered to be more or less a substitute for traditional TV content (26,4%). Among 15-19 year old weekly Netflix users, this share is 41,9%. This can be related to the fact that 41,0% of the youngest age group agrees that Netflix serves as a substitute for traditional TV, compared to 26,6% of the total population (see further on in this chapter).

NETFLIX: SUBSTITUTE FOR OR ADDITION TO WATCHING TV CONTENT (WEEKLY BASIS) - SPLIT BY AGE



Video graph 10: Share of only watching Netflix vs. combining Netflix with traditional TV (either live or timeshifted viewing) (of Flemings watching Netflix on a weekly basis, N=235)

STREAMING/DOWNLOADING FILMS & SERIES

FREQUENCY OF STREAMING/DOWNLOADING FILMS & SERIES

Flemings are downloading movies and series as frequently as they did in 2016. Streaming is still the more popular way to watch online audiovisual content. Almost 3 in 10 Flemings stream movies and series on a monthly basis (28,6%, +2,4 percentage points), while fewer than 1 in 5 Flemings download films and series every month (17,5%, -1,1 percentage points).

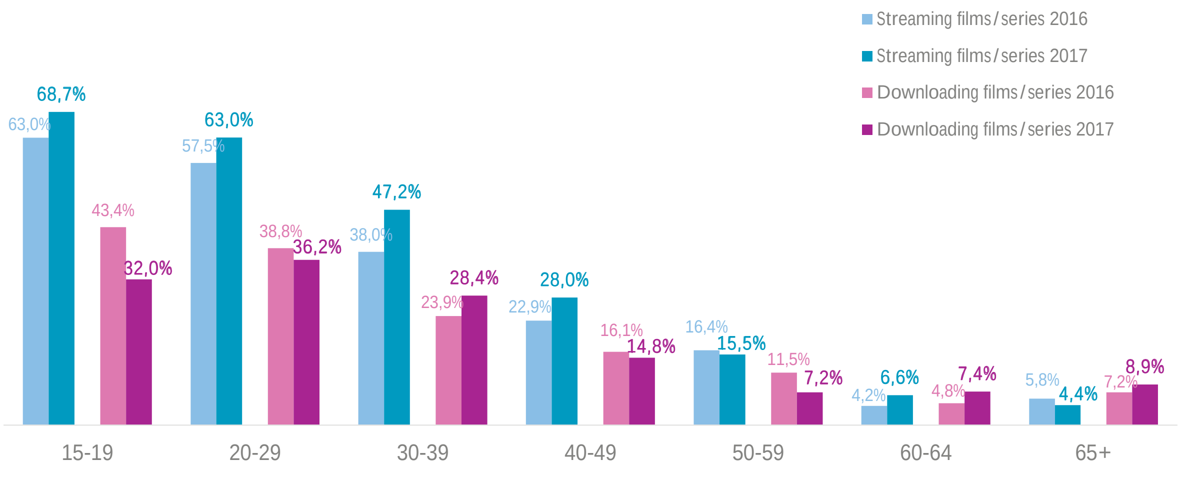
There is a clear relationship with age, as downloading and streaming films and series on a monthly basis decreases with increasing age. Moreover, the divide between streaming on one hand and downloading on the other is much more pronounced within the youngest age groups than within older age groups. For instance, the divide between streaming (68,7%, +5,7 percentage points compared to 2016) and downloading (32,0%, -11,4 percentage points) audiovisual content is 36,7 percentage points (in favor of streaming content) within the youngest age group (15-19 years old), while there is no significant difference between downloading (7,4%) and streaming (6,6%) films and series among 60-64 year olds. Among Flemings aged 65+, it seems that downloading (8,9%) is still slightly more popular than streaming (4,4%).

FREQUENCY OF DOWNLOADING/STREAMING FILMS AND SERIES

	Ever			Monthly			Daily		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
Streaming films/series	37,9%	37,2%	**37,5%**	22,9%	26,2%	**28,6%**	6,2%	7,8%	**9,7%**
Downloading films/series	33,3%	34,8%	**33,1%**	17,5%	18,6%	**17,5%**	3,5%	2,2%	**3,0%**

Video table 4: 'How frequently do you download and/or stream series and movies?' (N=2.345)

STREAMING/DOWNLOADING SERIES AND MOVIES ON MONTHLY BASIS - SPLIT BY AGE GROUP



Video graph 11: Streaming/downloading series and movies on monthly basis - split by age group (N=2.345)

LEGAL VS. ILLEGAL STREAMING/DOWNLOADING SERIES AND MOVIES

Streaming films and series seems to happen more often in a legal way than downloading (according to perception). 63,0% of Flemings who have ever streamed a film or series claim to do this primarily in a legal way, while 48,0% of Flemings who have ever downloaded audiovisual content make the same claim. Compared to last year and the year before, both streaming and downloading films and series seem to have shifted toward legal methods of obtaining that content (according to the perception of the Flemish population).

There is a clear relationship between age and engaging in illegal downloading or streaming of films and series. Flemings between the ages of 15 and 29 years old report to more often (mainly) download and stream illegally compared to the older age groups.

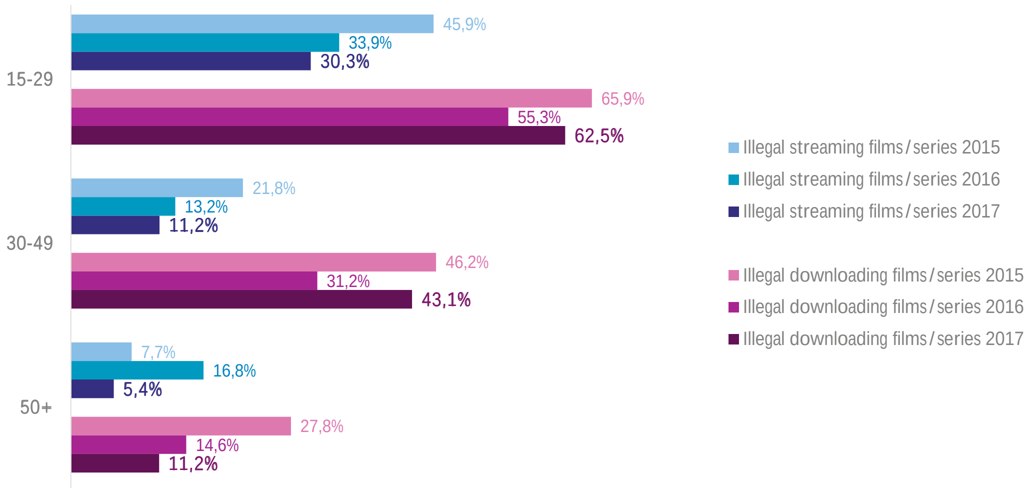
LEGAL VS. ILLEGAL STREAMING/DOWNLOADING SERIES AND MOVIES

	Only/mainly legal			Both legal and illegal			Only/mainly illegal		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
Streaming films/series	51,9%	60,7%	63,0%	17,7%	16,8%	18,0%	30,3%	22,5%	19,0%*
Downloading films/series	31,2%	44,3%	48,0%*	16,4%	17,9%	15,9%	52,4%	37,7%	36,1%

Video table 5: 'To what extent do you download and/or stream series and movies in a legal or an illegal way?' (of people ever streaming (N=879) or downloading (N=776) series and movies)

* Statistically significant change compared to the previous year, based on a chi-square test.

ILLEGAL STREAMING/DOWNLOADING SERIES AND MOVIES - SPLIT BY AGE GROUP



Video graph 12: Proportion only/mainly illegal streaming or downloading films and series (of people ever streaming (N=879) or downloading (N=776) series and movies) - split by age group

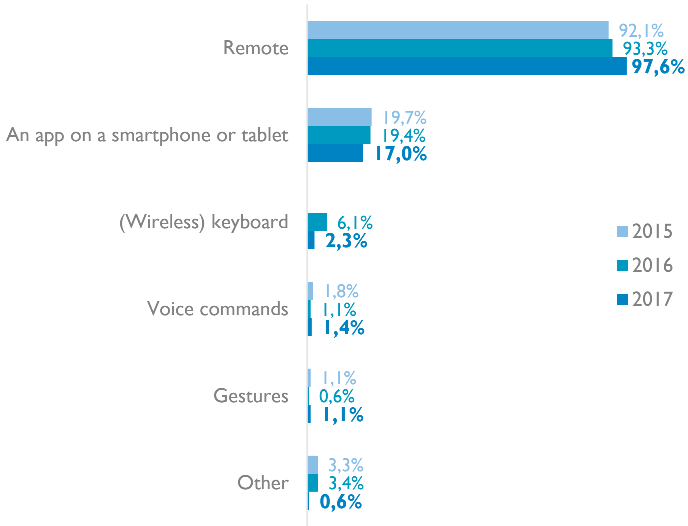
SMART TV: OPERATION AND APP USAGE

41,9% of Flemings have a smart TV at home, +2,3% (see Devices & Connections chapter). But how are they using the smart TV? Are they using the smart TV in a 'smart' (connected) way, or do they merely use it as a regular TV set?

OPERATING SMART TVS

Flemish smart TV owners predominantly use a regular remote control (97,6%, + 3,3 percentage points). Fewer than 1 in 5 Flemings with a smart TV at home state using a smartphone or tablet app to control the smart TV (17,0%, -2,4 percentage points). 2,3% make use of a (wireless) keyboard to use the smart TV (-3,8 percentage points). More advanced features related to smart TV operation such as voice command sensors (1,4%) or gesture-detecting cameras (1,1%) are still far from commonplace.

HOW DO YOU OPERATE YOUR SMART TV?



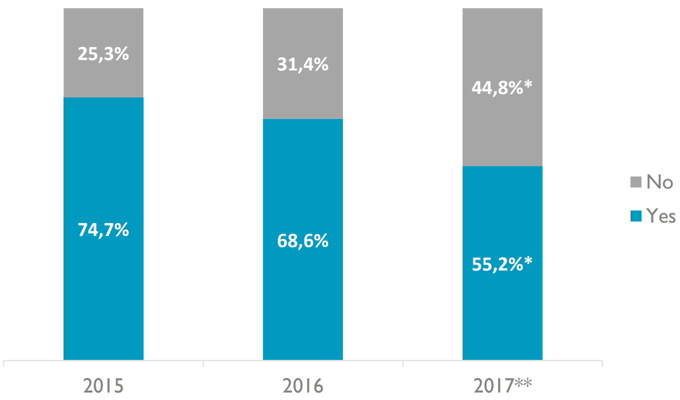
Video graph 13: 'How do you operate your smart TV?' (of people with a smart TV within their household, N=983)

USING APPS ON THE SMART TV

Just over half of Flemings with a smart TV at home state having ever used an app on that device (55,2%). That is a significant decrease compared to 2016, when 68,6% of people with a smart TV at home used a smart TV app; in 2015 this was 74,7%. We should note, however, that due to a change in formulation, comparison with previous years should be approached with caution. Whereas respondents had to indicate the frequency of use per (type of) app in previous years, they now had to report usage frequency for apps in general.

Fewer than 3 in 10 of smart TV owners claim to use apps on that device at least once per month (28,7%). The use of apps on a smart TV is a daily habit for 1 in 10 smart TV owners (9,4%).

EVER USED AN APP ON YOUR SMART TV

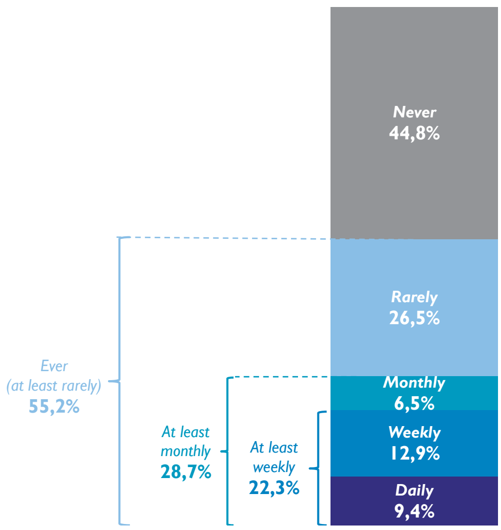


Video graph 14: 'Ever used an app on your smart TV?' (of people with a smart TV within their household, N=983)

* Statistically significant change compared to the previous year, based on a chi-square test.

** The formulation of the question changed in 2017 compared to the previous years. In 2017, the respondents were asked how frequently they used apps (in general) on the smart TV, whereas in previous years, respondents indicated the frequency of use per (type of) app. It is conceivable that by condensing the detailed question of the previous years into a more general format, people are less inclined to respond that they have ever used apps on their smart TVs).

FREQUENCY OF USING APPS ON SMART TV*



Video graph 15: 'How often do you use apps on a smart TV?' (of people with a smart TV within their household, N=983)

* Comparison with the previous year(s) is not possible due to a change in question formulation.

OPINION ON WATCHING TV AND VIDEO CONTENT

A substantial share of the Flemish population agrees that virtual reality has the potential to become an important tool for experiencing media content (39,8%, -0,8 percentage points). Only 15,6% are convinced that VR will not live up to the expectations (or at least not within 5 years). Flemings younger than 50 years old particularly seem to believe in the potential of VR.

Overall, Flemings are satisfied with the offerings of traditional TV stations (47,0%, -1,1 percentage points). Among Flemings aged 15-29, however, we do see decreased satisfaction (40,6%, -7,1 percentage points). Satisfaction with Telenet Play/Play More (49,3%, +3,1 percentage points) and especially Netflix (64,7%, +7,4 percentage points) has increased significantly compared to last year. Flemings still believe that traditional TV stations have their place next to on-demand forms of audiovisual content. In other words, they see services such as Netflix and Telenet Play/Play More as supplements to traditional TV stations, rather than substitutes. This is confirmed by the fifth statement, as 26,6% of Flemings agree that video-on-demand services act as alternatives for traditional TV stations. However, this is a significant increase compared to last year, when only 18,9% agreed on this statement (+7,6 percentage points). Particularly among Flemings aged 15-29, there is a substantial segment that seems to consider video-on-demand services a substitute for traditional TV stations (46,2%, +12,0 percentage points).

Most Flemings don't see added value in collecting physical carriers of audiovisual content (e.g. DVDs, Blu-ray discs, etc.), as only 12,7% agree that they would rather spend money on DVDs than on digital on-demand services. Moreover, this feeling seems to be shared among all age groups.

Over 4 in 10 Flemings state to be willing to pay for films and series they like (41,0%). Among people younger than fifty, this is over half of the population (15-29: 55,7%; 30-49: 53,8%). Among Flemings aged 50+, the willingness to pay is merely 27,2%. This could be due to the fact that this age segment relies mainly on the traditional TV broadcaster to program the series and movies they like to see, and see less added value in paying for extra on-demand services or DVDs.

OPINION ON WATCHING VIDEO AND TV CONTENT

	(Totally) disagree	Neutral	(Totally) agree
Within 5 years, VR will be an important type of entertainment	15,6%	44,6%	39,8%
I am satisfied with the programming on Flemish TV stations	24,0%	29,0%	47,0%
I am satisfied with the offering of films and series on Play/Play More (Telenet) *(of Flemings having access to a Play/Play More account, N=304)*	16,2%	34,6%	49,3%
I am satisfied with the offering of films and series on Netflix *(of Flemings having access to a Netflix account, N=485)*	13,6%	21,8%	64,7%
To me, video-on-demand services such as Netflix are substitutes for traditional TV stations	34,6%	38,9%	26,6%
I would rather spend money on DVDs than on a digital on-demand service such as Netflix	52,6%	34,7%	12,7%
I am willing to pay for films and series I really like	27,6%	31,4%	41,0%

Video table 6: 'To what extent do you agree with the following statements?' (on a 5-point scale) (N=2.345, except where indicated otherwise)

SHARE (TOTALLY) AGREE WITH STATEMENTS – SPLIT BY AGE GROUP

		15-29	30-49	50+	Total
Within 5 years, VR will be an important type of entertainment	2016	49,3%	48,5%	31,6%	40,6%
	2017	47,3%	45,5%	33,2%	39,8%
I am satisfied with the programming on Flemish TV stations	2016	47,7%	45,1%	50,2%	48,1%
	2017	40,6%	46,3%	52,1%	47,0%
I am satisfied with the offering of films and series on Play/Play More (Telenet) *(of Flemings having access to a Play/Play More account, N=304)*	2016	64,4%	44,7%	33,7%	46,2%
	2017	53,2%	40,3%	54,5%	49,3%
I am satisfied with the offering of films and series on Netflix *(of Flemings having access to a Netflix account, N=485)*	2016	51,6%	61,6%	57,1%	57,2%
	2017	62,0%	68,6%	61,3%	64,7%
To me, video-on-demand services such as Netflix are substitutes for traditional TV stations	2016	34,2%	25,4%	8,1%	18,9%
	2017	46,2%	35,8%	13,0%	26,6%
I would rather spend money on DVDs than on a digital on-demand service such as Netflix	2016	15,6%	14,2%	11,1%	13,0%
	2017	9,9%	14,1%	13,0%	12,7%
I am willing to pay for films and series I really like	2016				
	2017	55,7%	53,8%	27,2%	41,0%

Video table 7: Share (totally) agree with the statements (on a 5-point scale) - split by age group (N=2.345, except where indicated otherwise)

DIGIMETER PROFILES

TV & VIDEO

DISRUPTOR (19,6%)

For Disruptors, audiovisual content is mainly consumed in the form of online video. They rarely watch live TV programming, with merely 1,2% doing this on a weekly basis (compared to 70,1% in the total population). It may come as no surprise that, of all segments, Disruptors are the least satisfied with the content shown on Flemish TV stations (29%, compared to 47% in the total population). In fact, they think that video-on-demand services such as Telenet Play More or Netflix serve as substitutes for traditional broadcasting (50%, compared to 27% in the total population). In contrast to the low frequency of watching traditonal TV broadcasting, they do frequently watch online video (73% on a daily basis, compared to 58% in the total population). Social media (47%) and YouTube (34%) are popular platforms for streaming online video daily. Watching videos on news websites (25%) is a less popular practice among Disruptors compared to Media Maniacs (46%), Augmented Traditionalists (41%) and even Strugglers (31%), although this mainly has to do with general low interest in following the news among Disruptors (see chapter News Consumption). Disruptors are more familiar with illegal platforms for downloading or streaming content than all other segments.

MEDIA MANIAC (19,3%)

Typical for Media Maniacs is that they consume a high amount of both digital and traditional media, but with a clear hunger especially for digital media. This is also apparent when it comes to watching audiovisual content. 50% of Media Maniacs watch live TV on a daily basis (which is at par with the total population), while 87% watch online video every day (58% in the total population). Social media in particular are used as a daily source of video content (74%). Remarkably, a higher share of Media Maniacs claim to watch videos on news websites every day (46%) than on YouTube (40%). 47% of Media Maniacs are satisfied with the content on Flemish TV stations, but an almost equal share believes that video-on-demand services are suitable substitutes to the traditional broadcasters (42%). Media Maniacs are the biggest believers of virtual reality, as 54% are convinced that VR will be an important entertainment format within 5 years (total population: 40%). What may come as no surprise, as this is the segment with the highest net income, is that they show the highest willingness to pay for audiovisual content (61%, compared to 41% in the total population).

AUGMENTED TRADITIONALIST (19,5%)

Augmented Traditionalists still have a habit of watching live TV on a daily basis (63%, compared to 50% of Media Maniacs, and 50% in the total population). They supplement this with watching online video (74%, compared to 87% among Media Maniacs and 58% in the total population). Social media (56%) and news websites (41%) are the most common sources for watching online video on a daily basis. With 22% of Augmented Traditionalists watching YouTube videos every day, they are at par with the total population (21%), but well below Media Maniacs (40%) and Disruptors (34%). Over half of Augmented Traditionalists are satisfied with Flemish TV stations (55%, compared to 47% among Media Maniacs and the total population, and 29% among Disruptors).

STRUGGLER (22,7%)

Strugglers show the highest tendency of all segments to watch live programming on a daily basis (71%). Not surprisingly, they also show the highest satisfaction with the content on Flemish TV stations (61%). Although Strugglers are clearly attached to their traditional habit of watching live TV programming, that doesn't mean that they don't explore alternative ways of consuming video. 43% of Strugglers watch online video on a daily basis. While this is well below the average in the Flemish population (58%), this is still a substantial share. Only 8% of the Strugglers consider video-on-demand services as substitutes to traditional TV broadcasters (total population: 27%).

RESISTOR (18,9%)

To Resistors, things are simple: TV content should be watched on a TV set, at the moment the program is aired. 61% of Resistors watch linear TV broadcasting every day (total population: 50%). Watching online video is still a rare activity for Resistors, as only 16% watch online videos on a daily basis (compared to 58% of the total population). Resistors do not agree at all that video-on-demand services could replace traditional TV broadcasting (5%). They are also more skeptical about virtual reality, as only 15% agree that this could become an important form of entertainment within the next 5 years (total population: 40%). They also show the lowest willingness to pay for series and movies they really like (17%, compared to 41% in the total population).

Devices to watch TV/video content (daily basis)

	TV set	Laptop	Desktop	Smartphone	Tablet
Disruptor	31%	31%	15%	31%	11%
Media Maniac	70%	36%	11%	57%	23%
Augmented Traditionalist	73%	16%	7%	22%	8%
Struggler	61%	9%	5%	9%	7%
Resistor	55%	6%	0%	3%	2%

Ways to watch TV content (weekly basis)

	Live/linear TV programming	Timeshifted viewing
Disruptor	0%	13%
Media Maniac	50%	34%
Augmented Traditionalist	63%	37%
Struggler	71%	33%
Resistor	61%	18%

Online video (daily basis)

	Total online video	YouTube	Social media	News websites
Disruptor	73%	34%	47%	25%
Media Maniac	87%	40%	72%	46%
Augmented Traditionalist	74%	22%	56%	41%
Struggler	43%	6%	13%	31%
Resistor	16%	5%	6%	5%

Online films/series

	Streaming (weekly basis)	Downloading (weekly basis)	Streaming (Only/mainly illegal)	Downloading (Only/mainly illegal)
Disruptor	42%	20%	15%	24%
Media Maniac	52%	21%	13%	21%
Augmented Traditionalist	21%	10%	6%	10%
Struggler	4%	5%	1%	4%
Resistor	0%	1%	0%	1%

Statements (% (totally) agree)

	VR = important type of entertainment within 5 years	Satisfied with Flemish TV stations	Rather spend money on DVDs than on online VOD subscription	Willing to pay for films and series you really like	VOD-services (e.g. Netflix) are substitutes for traditional TV stations
Disruptor	48%	29%	14%	53%	50%
Media Maniac	54%	47%	11%	61%	42%
Augmented Traditionalist	44%	55%	13%	48%	29%
Struggler	38%	61%	17%	28%	8%
Resistor	15%	41%	8%	17%	5%

CHAPTER 03

RADIO AND MUSIC

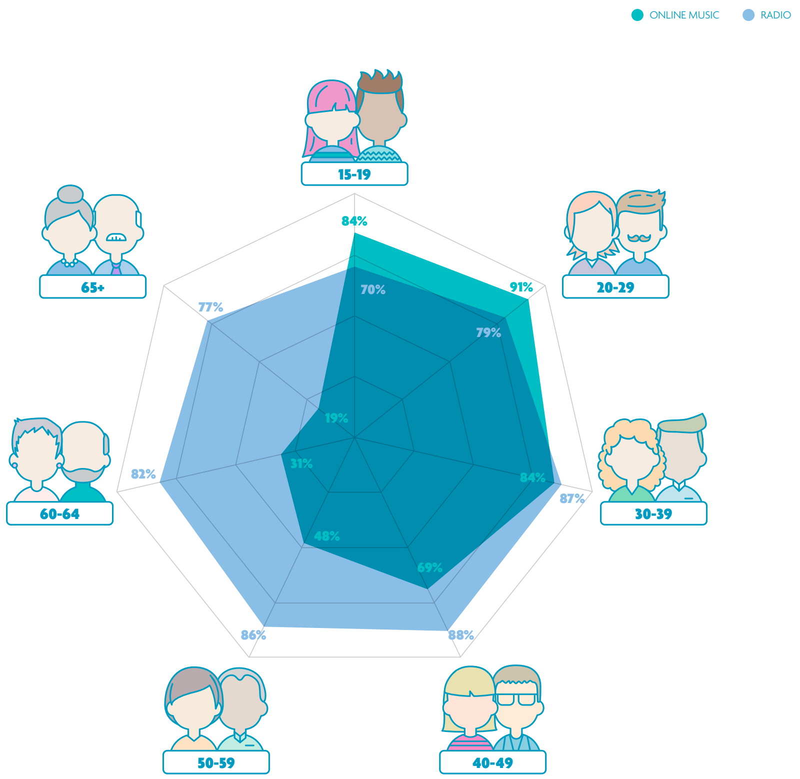
IMEC.DIGIMETER INFOGRAPHIC

RADIO & MUSIC

Online streaming #1 music source

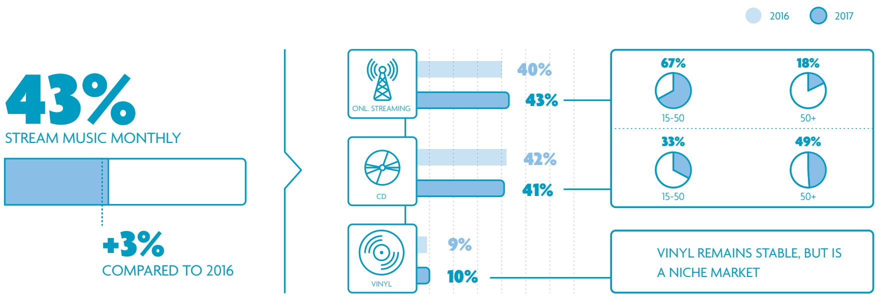
ONLINE MUSIC VS. RADIO

Online music is the most popular within younger segments



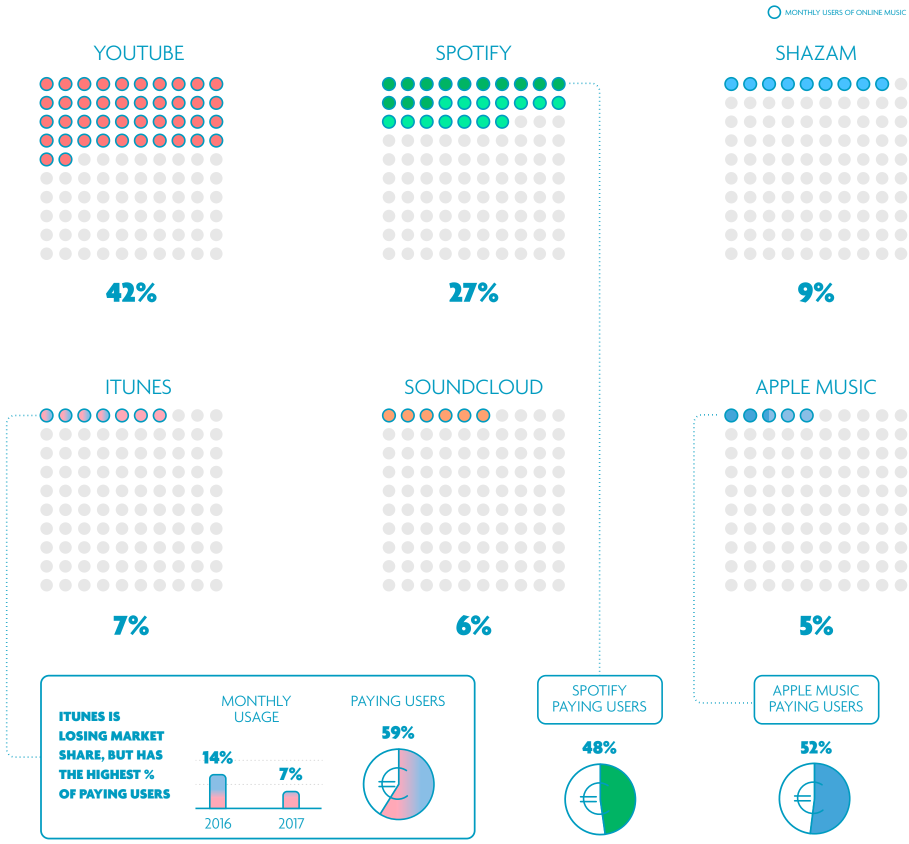
ONLINE STREAMING

Online streaming dethrones the CD



ONLINE MUSIC

YouTube remains the most popular online music platform

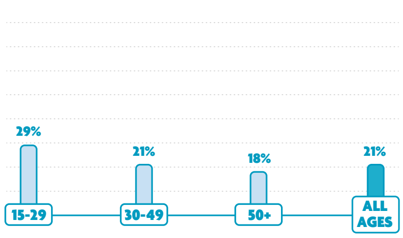


STATEMENTS

Radio fatigue, satisfaction & willingness to pay for music

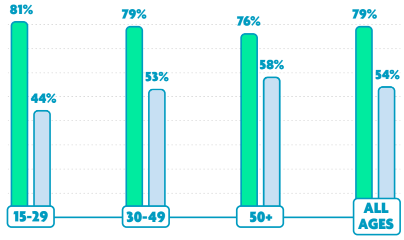
RADIO FATIGUE

"I listen less frequently to radio stations compared to last year"



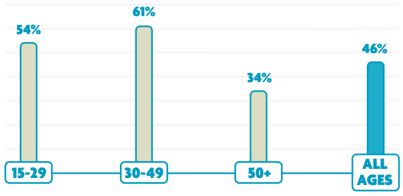
SATISFACTION

"I am satisfied with the programming on Flemish radio/Spotify"



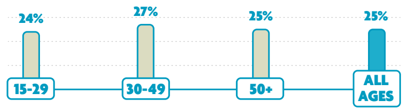
WILLING TO PAY

"I am willing to pay for music I really like"



CDs & LPs

"I would rather spend money on CDs and LPs than on online music"



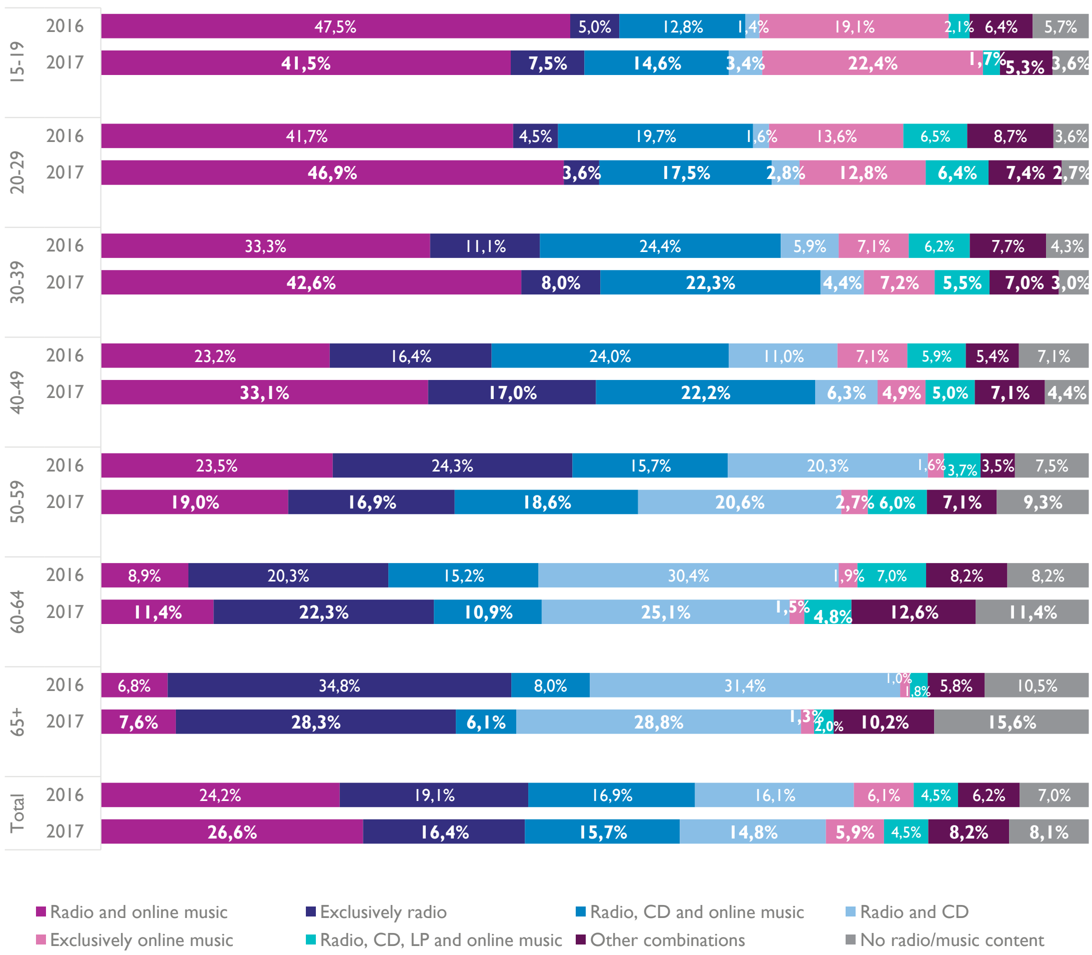
RADIO AND MUSIC

RADIO & MUSIC CONSUMPTION

91,9% of Flemings listen to music and/or radio on a monthly basis (-1,1 percentage points compared to last year). The most common combination remains listening to radio and online music (26,6%, +2,4 percentage points). Remarkably, among 15-19 year olds, this is 41,5% (although this is 6,0 percentage points fewer than last year), while 22,4% use only online music as a monthly source of audio content (+3,3 percentage points). This illustrates the fact that although listening to online music (83,7%, -0,4 percentage points) is more common than listening to the radio (70,4%, -1,5 percentage points) among the youngest age group (see table 2 and graph 2, respectively), that doesn't mean that youngsters only listen to online music. In fact, as 22,4% of 15-19 year old Flemings only listen to online music on a monthly basis, that means that 61,3% of the youngest age group combine online music with other sources on a monthly basis (as 22,4% + 61,3% = 83,7%). The most common combinations with online music within that age group are the combinations 'online music and radio' (41,5%) and 'radio, CD and online music' (14,6%, +1,8 percentage points).

16,4% (-2,7 percentage points) of the Flemish population only listens to radio broadcasting on a monthly basis. There is a clear relationship with age, as this is the case for only 7,5% of 15-19 year old Flemings, compared to 28,3% among the oldest age segment (65+).

RADIO & MUSIC CONSUMPTION ON A MONTHLY BASIS - SPLIT BY AGE GROUP



Radio graph 1: Radio & music consumption on a monthly basis (selected sources: radio, CD, LP and online music) - split by age group (N=2.345)

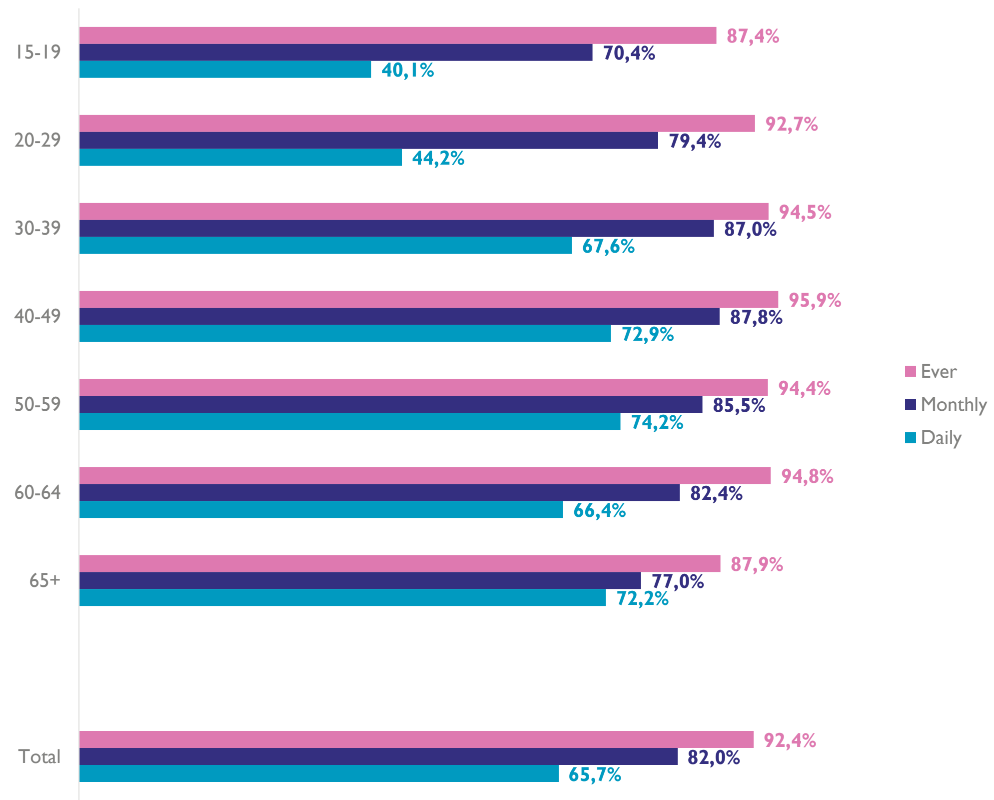
LISTENING TO RADIO BROADCASTING

Radio broadcasting remains a central concept in the media consumption patterns of Flemings. 82,0% listen to radio broadcasting at least once a month, and 7 in 10 Flemings report listening to radio stations on a daily basis (65,7%). There is a clear relationship with age, as 40,1% of 15-19 year olds versus over 72,2% of Flemings aged 50 and older listen to the radio every day. That doesn't mean that the younger generation doesn't listen to the radio anymore, as 70,4% of 15-19 year olds tune in at least once a month to radio stations.

Compared to last year, we observed a slight decrease in daily radio consumption (-2,3 percentage points). The highest decrease was seen among 20-29 year old Flemings (-5,1 percentage points), 60-64 year olds (-13,9% percentage points) and 65+ year olds (-4,0 percentage points)[21].

Traditional radio sets at home (63,1%, +0,6 percentage points) and car radios (46,5%, -5,9 percentage points) remain the most common devices used to listen to the radio. Over 1 in 5 Flemings listen to radio stations through (digital) TV (22,7%, +1,4 percentage points). A similar number use a computer to tune in to radio shows (19,6%, +0,2 percentage points). 15-19 year olds more commonly use a smartphone to listen to radio broadcasting (19,2%) than a computer (13,0%). 5,4% of Flemings claim to use a DAB or DAB+ device to listen to the radio (-0,5 percentage points).

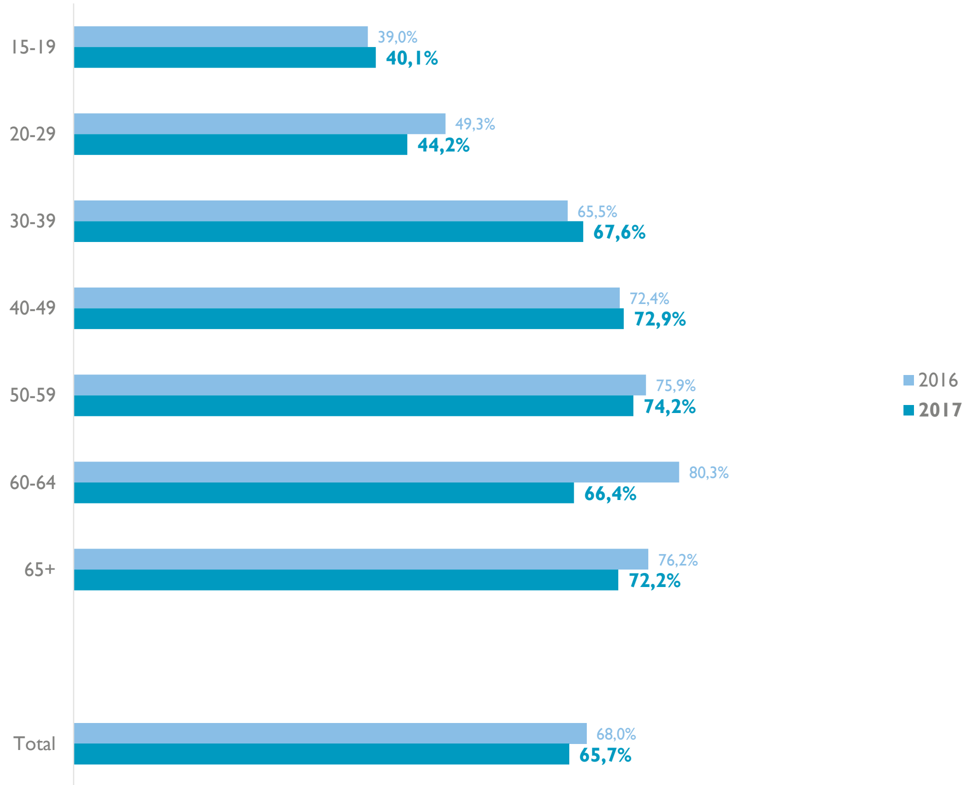
FREQUENCY LISTENING TO RADIO BROADCASTING - SPLIT BY AGE GROUP



Radio graph 2: 'How often do you listen to radio stations on any device?' - split by age group (N=2.345)

21 We must remind readers that these figures only represent respondents' perception of how often they think they listen to radio broadcasting. In other words, we are measuring the perception of radio consumption among Flemings, and not the actual reach of radio.

DAILY LISTENING TO RADIO BROADCASTING - EVOLUTION AND SPLIT BY AGE GROUP



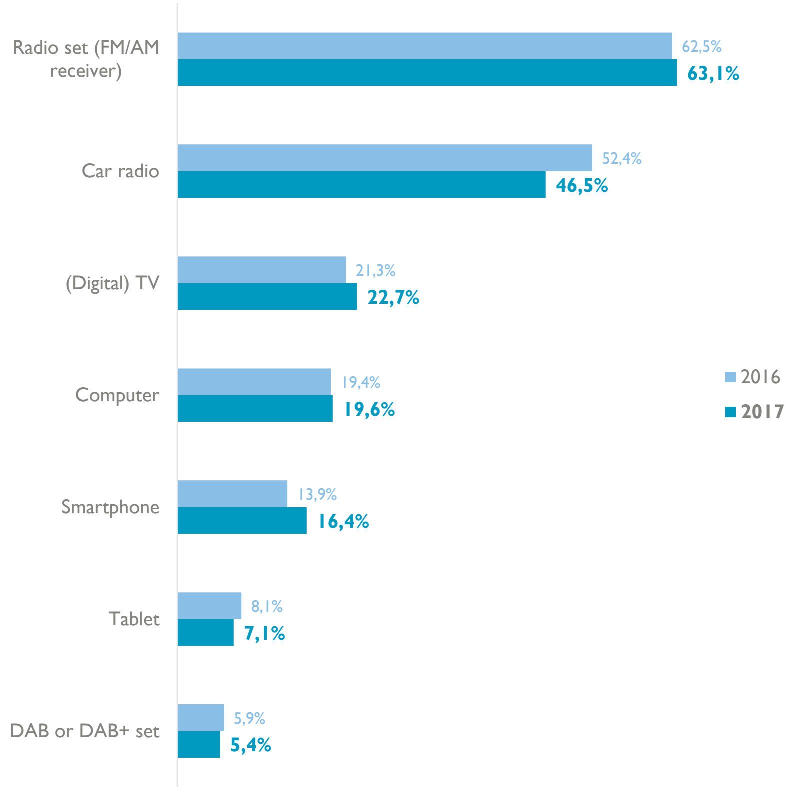
Radio graph 3: Daily listening to radio broadcasting - evolution and split by age group (N=2.345)

DEVICES USED TO LISTEN TO RADIO BROADCASTING (MONTHLY BASIS)

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Radio set (FM/AM receiver)	49,9%	55,5%	57,6%	59,6%	69,5%	68,2%	70,3%	63,1%
Car radio	42,4%	52,0%	54,5%	55,2%	52,0%	37,5%	33,1%	46,5%
(Digital) TV	20,0%	24,0%	26,0%	24,9%	23,1%	24,4%	18,4%	22,7%
Computer	13,0%	26,4%	23,0%	28,5%	20,9%	17,3%	9,5%	19,6%
Smartphone	19,2%	21,9%	25,2%	24,2%	17,4%	5,1%	4,8%	16,4%
Tablet	1,9%	4,6%	9,4%	11,6%	10,2%	4,7%	4,2%	7,1%
DAB or DAB+ set	3,6%	3,7%	9,2%	6,1%	6,9%	1,8%	4,1%	5,4%

Radio table 1: 'Which of the following devices do you use at least once every month to listen to radio broadcasting?' - split by age group (N=2.345)

DEVICES USED TO LISTEN TO RADIO BROADCASTING (MONTHLY BASIS) - EVOLUTION



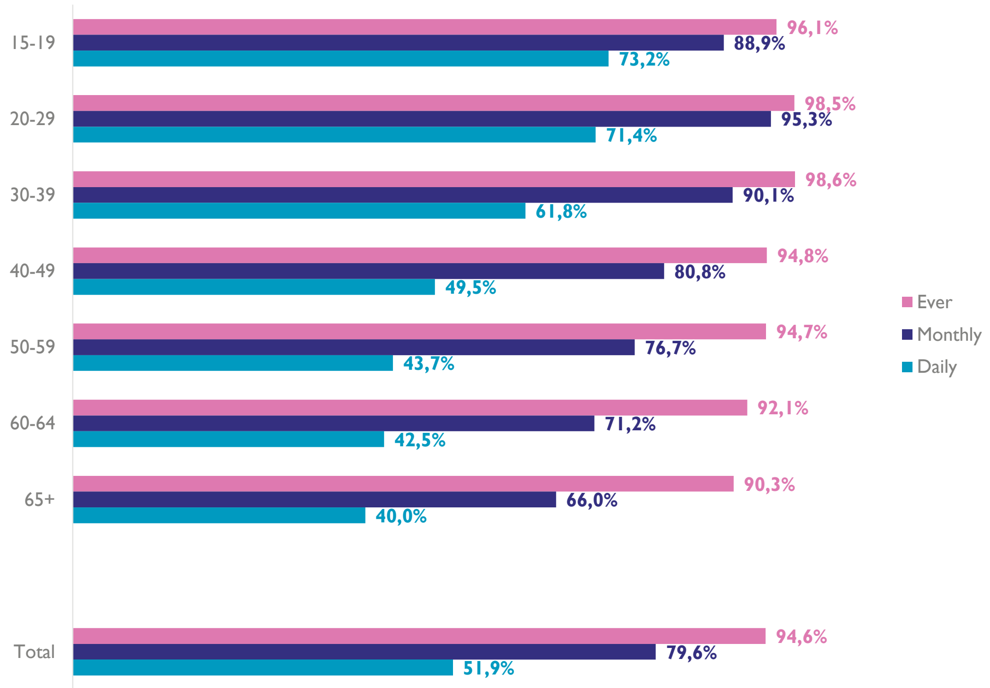
Radio graph 4: 'Which of the following devices do you use at least once every month to listen to radio broadcasting?' - evolution compared to last year (N=2.345)

LISTENING TO MUSIC

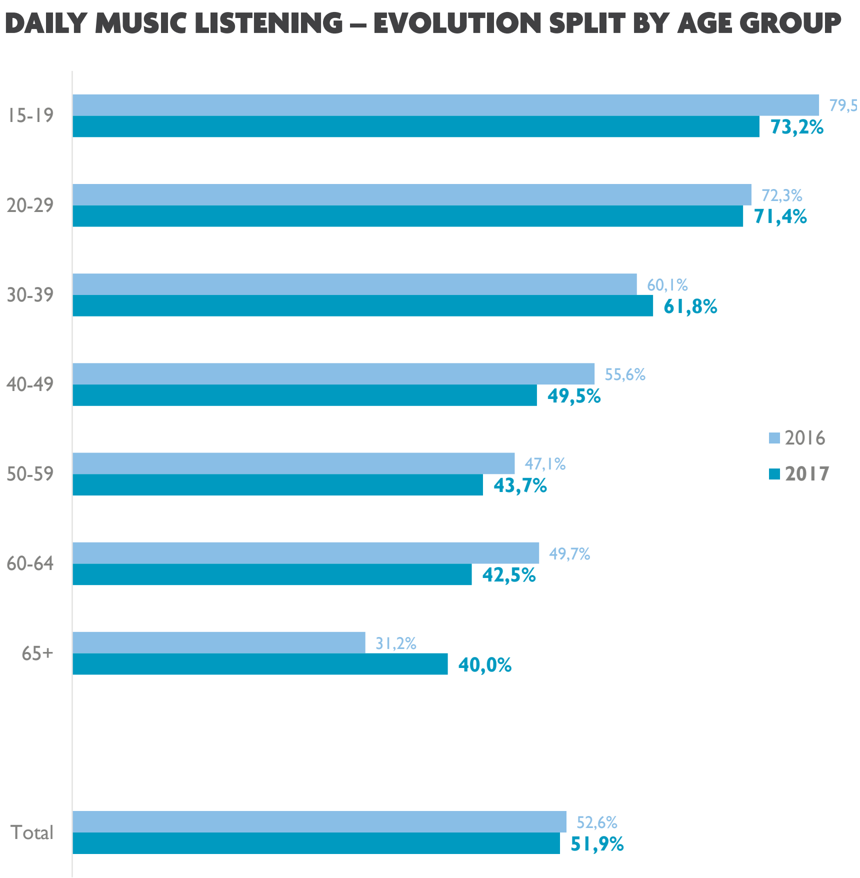
FREQUENCY OF LISTENING TO MUSIC

Listening to music is especially popular among the younger age groups. 73,2% of 15-19 year olds listen to music on a daily basis (-6,3 percentage points compared to last year), and among 20-29 year olds, this figure is 71,4% (-0,9 percentage points). 4 in 10 Flemings aged 65 years and older claim to listen to music (apart from radio broadcasting) on a daily basis (+8,8 percentage points). Overall, more than half of Flemings listen to music on a daily basis (51,9%, -0,7 percentage points).

FREQUENCY OF LISTENING TO MUSIC - SPLIT BY AGE GROUP



Radio graph 5: 'How often do you listen to music (excluding listening to radio broadcasting)?' - split by age group (N=2.345)



Radio graph 6: Daily music listening (excluding listening to radio broadcasting) – evolution split by age group (N=2.345)

SOURCES OF MUSIC

For the first time, more Flemings claim to stream music online at least once per month (42,7%, +2,5 percentage points) than to listen to a CD (41,2%, -0,8 percentage points). However, we do see remarkable differences between age groups. Online streaming is clearly more favored (compared to the CD) by 15-49 year olds. For Flemings aged 50 years and older, the CD is clearly the preferred source of music.

That online music (both streaming and downloading music) is more popular among younger age groups comes as no surprise. 83,7% of Flemings aged 15-19 years old claim to listen to online music on a monthly basis. Among 20-29 year olds, this is 90,6%. Fewer than half of Flemings in their fifties listen to online music every month (47,9%), whereas this is true for merely 1 in 5 Flemings aged 65+ (19,4%). In total, 56,3% of the total population states to listen to online music on a monthly basis (+1,7 percentage points).

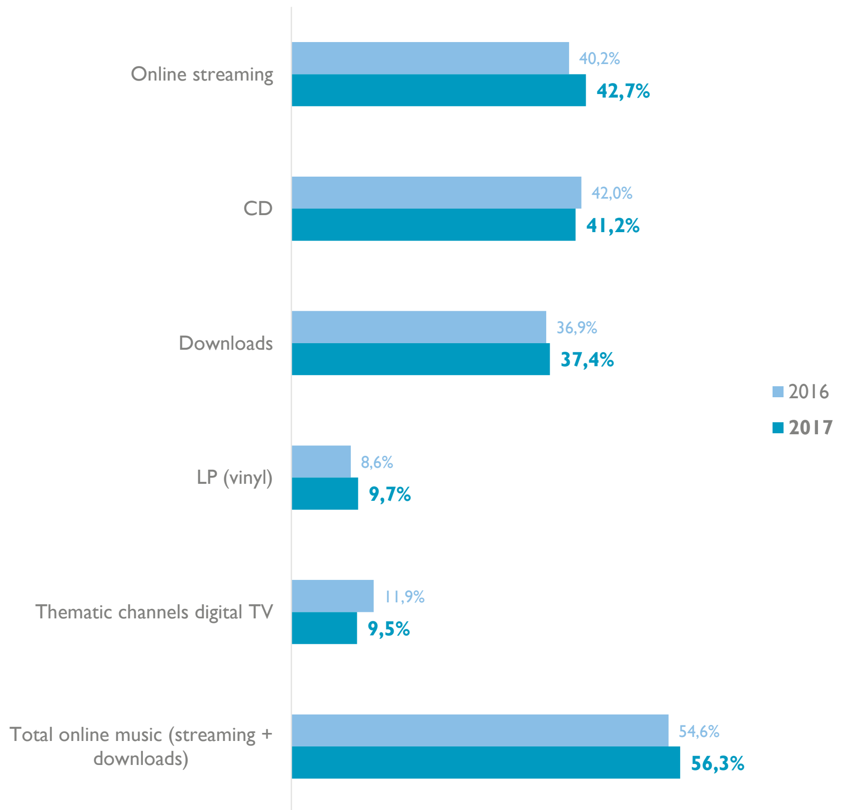
The LP may have experienced a revival in the last couple of years, but merely 1 in 10 Flemings claims to listen to long-playing records on a turntable (9,7%, +1,1 percentage points). 9,5% of Flemings claim to listen once a month to thematic channels via digital TV (e.g. jazz channel, rock channel, 70s channel, etc.) (-2,4 percentage points).

SOURCES OF MUSIC - SPLIT BY AGE GROUP

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Online streaming	74,9%	78,1%	66,4%	54,6%	31,3%	15,9%	9,0%	42,7%
CD	22,8%	30,9%	34,7%	38,4%	50,6%	53,4%	46,7%	41,2%
Downloads	58,5%	62,8%	54,4%	43,8%	30,0%	21,3%	13,8%	37,4%
LP (vinyl)	4,0%	10,5%	11,2%	9,9%	11,9%	13,9%	6,7%	9,7%
Thematic channels digital TV	6,4%	10,4%	9,7%	9,9%	12,5%	9,5%	7,3%	9,5%
Total online music (streaming + downloads)	83,7%	90,6%	83,9%	68,5%	47,9%	30,8%	19,4%	56,3%

Radio table 2: 'Which of the following sources do you use at least once every month to listen to music?' (excluding radio broadcasting) - split by age group (N=2.345)

SOURCES OF MUSIC - EVOLUTION

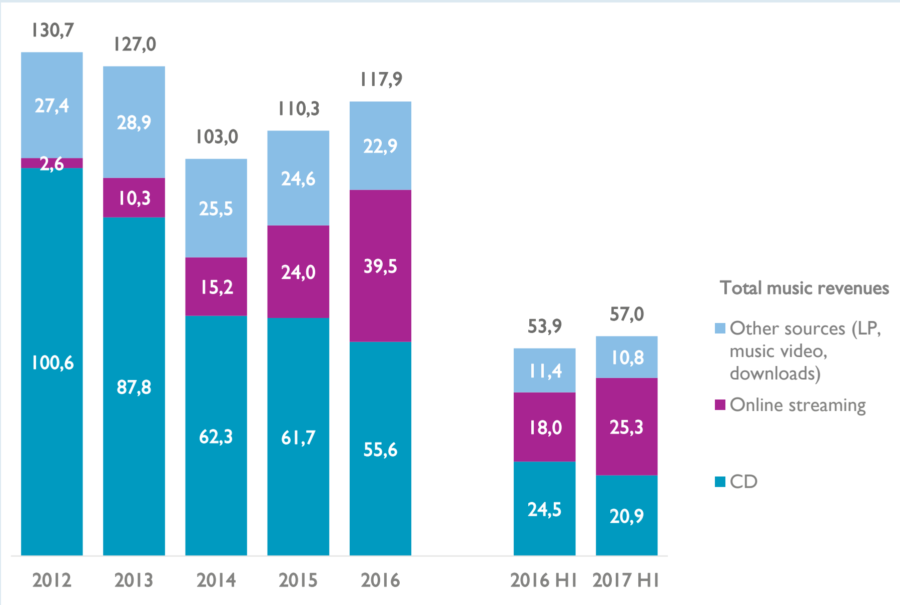


Radio graph 7: Sources of music - Evolution (N=2.345)

A WORD ON THE BELGIAN MUSIC INDUSTRY

According to imec digimeter, streaming music online (42,7%) has surpassed listening to CDs (41,2%) for the first time. This is in line with findings of biannual report on music sales in Belgium by the Belgian Entertainment Association and in cooperation with GfK[22]. Until 2016, revenue originating from CDs still had the upper hand in total music sales. However, the divide between CD sales and online streaming revenues has decreased strongly over the last five years. In the first six months of 2017, the order of rank has finally shifted, with online streaming generating more revenue than CDs.

REVENUE BELGIAN MUSIC INDUSTRY (IN MILLIONS OF EURO)



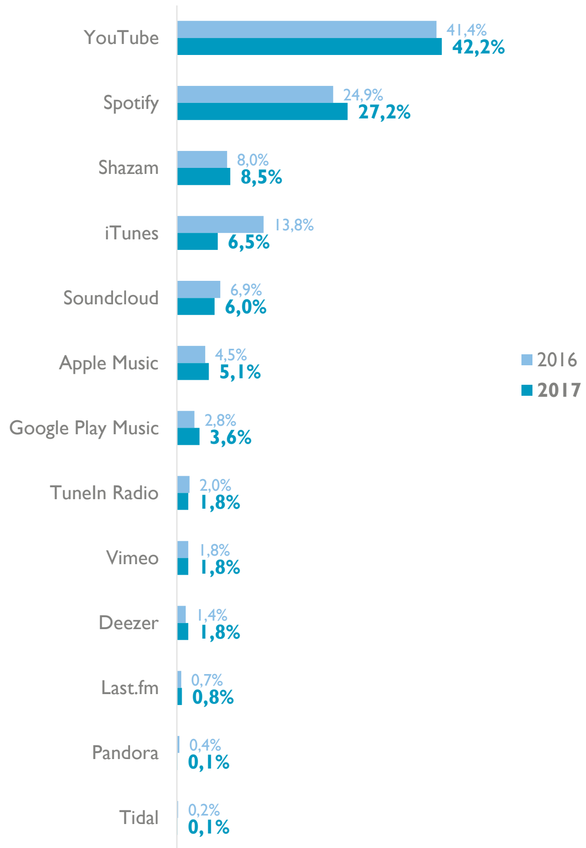
Framing graph 1: Revenue of Belgian music industry, expressed in millions of euro. Source: GfK – Belgian Entertainment Association.

22 http://www.belgianentertainment.be/en/paid-music-streaming-overtakes-cd/

ONLINE SOURCES OF MUSIC

YouTube remains the most popular platform for streaming online music. Over 4 in 10 Flemings use YouTube as a music catalog at least once per month (42,2%), which is roughly the same compared to last year (+0,8 percentage points). Spotify stands firmly in second place, with 27,2% of Flemings making use of this service (+2,3 percentage points). 6,5% of Flemings use iTunes at least once per month, which is a significant decrease compared to last year (-7,3 percentage points). The streaming service of Apple on the other hand, Apple Music, remains stable at 5,1% (+0,6 percentage points).

ONLINE SOURCES FOR MUSIC (STREAMING OR DOWNLOADING)



Radio graph 8: 'What online sources do you use at least once a month to listen to music?' (N=2.345)

PAYING FOR ONLINE MUSIC

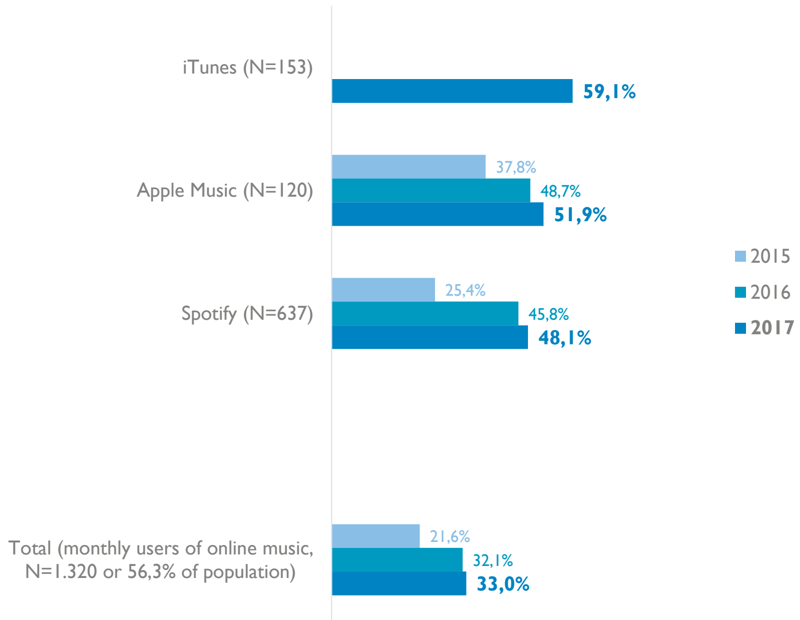
In a previous paragraph, we introduced the fact that that 56,3% of Flemings listen to music via online platforms at least once a month. Within that group of online music consumers, 1 in 3 report having paid for music within the last year (33,0%, +0,9 percentage points).

iTunes has the highest share of paid users. 6 in 10 iTunes users have paid for music in the past 12 months (59,1%).

Apple Music offers 3 free trial months, after which people have to pay €9,99 per month for a regular account, or €14,99 for a family account (maximum 6 people). Half of Apple Music users state paying for the service (51,9%, +3,2 percentage points), which means that half of users are still in their free trial periods, or share an account without paying for it themselves.

Spotify has both a free service (financed by advertisements) and a premium service (at the same pricing as Apple music: €9,99 for a single account, and €14,99 for a family account). 48,1% of Spotify users claim to have paid for the service in the past 12 months (+2,3 percentage points).

PAYING TO STREAM ONLINE MUSIC



Radio graph 9: 'On which of the following streaming platforms have you ever paid for music?' (of Flemings using the particular platform on a monthly basis)

LEGAL VS. ILLEGAL MUSIC STREAMING/DOWNLOADING

Just as with downloading movies and series (see TV & Video chapter), we note a continued shift towards more (perceived) legal alternatives for downloading music. In 2015, 35,1% of music downloaders state mainly or even only downloading illegally. This figure dropped to 26,6% in 2016, and to 24,5% in 2017. However, we stress that this only reflects the perceptions of the respondents.

Streaming music is almost exclusively done in a legal way (according to the perception of Flemish music streamers). Merely 1 in 20 music streamers claims to stream mainly via illegal platforms (5,1%, -1,9 percentage points compared to 2016, and -3,7 percentage points compared to 2015).

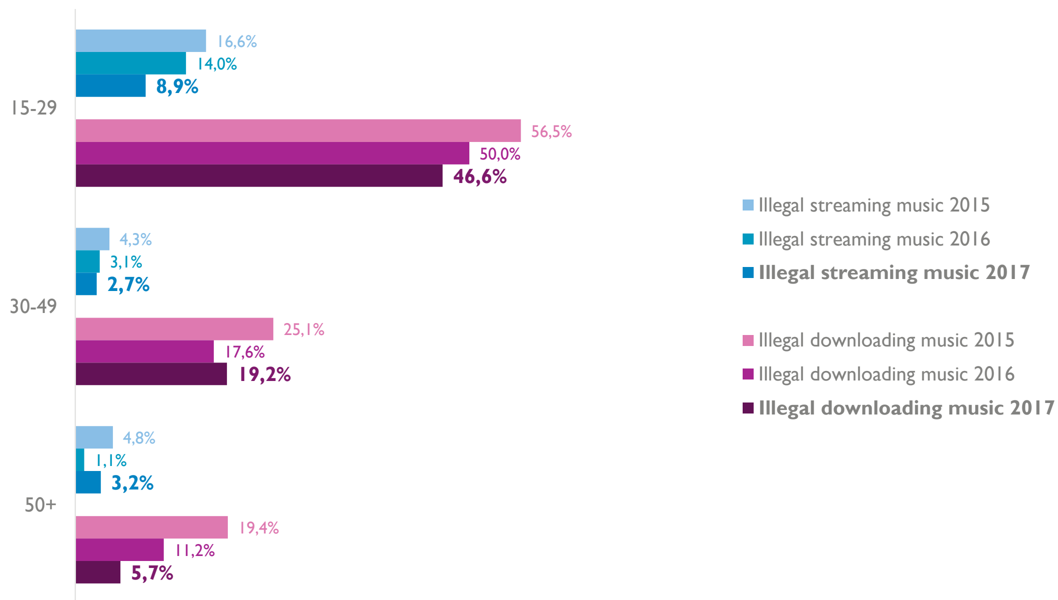
The use of illegal forms of downloading or streaming is most popular within the youngest segment. Nearly half of music downloaders aged 15-29 years old do so in a mainly illegal way (46,6%); for streaming music, this is 8,9% within music streamers of the same age segment. However, it should be noted that even within this segment, the trend towards more legal ways of consuming online music is clearly present. In 2016, half of music streamers aged 15-29 mainly streamed in an illegal way; in 2015, this was 56,5%. As for illegally downloading music, the figures dropped from 16,6% in 2015 to 14,0% in 2016 and further to 8,9% in 2017.

LEGAL VS. ILLEGAL MUSIC STREAMING/DOWNLOADING

	Only/mainly legal			Both legal and illegal			Only/mainly illegal		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
Streaming music	75,7%	79,8%	**83,2%**	15,7%	13,2%	**11,8%**	8,8%	7,0%	**5,1%**
Downloading music	48,4%	53,8%	**56,0%**	16,5%	19,6%	**19,3%**	35,1%	26,6%	**24,5%**

Radio table 3: 'To what extent do you download and/or stream music in a legal or an illegal way?' (of people ever streaming (N=1.000) or downloading (N=878) music).

ILLEGAL MUSIC STREAMING/DOWNLOADING - SPLIT BY AGE GROUP



Radio graph 10: Proportion only/mainly illegal music streaming or downloading (of people ever streaming (N=1.000) or downloading (N=878) music - split by age group

OPINION ON RADIO AND MUSIC CONSUMPTION

1 in 5 Flemings claims to listen less frequently to radio broadcasting compared to last year (21,1%, +0,3 percentage points). It seems that the youngest age segment in particular agrees with that statement (29,1%, -0,7 percentage points).

Despite a substantial number of Flemings who report listening less frequently to the radio, a clear majority of Flemings is still satisfied with the content on Flemish music stations (53,8%, -1,9 percentage points). Flemings aged 15-29 seem to be less satisfied with the programming on Flemish radio stations, as the share agreeing to this statement dropped from 48,0% in 2016 to 44,0% in 2017 (-4,0 percentage points).

Flemings using Spotify are predominantly positive about the music offered in the Spotify catalog (79,4%, -4,5 percentage points). Although the decrease of 4,5 percentage points compared to last year is statistically significant, with still 8 in 10 Spotify users claiming to be satisfied with the service, one can hardly speak of a user satisfaction problem.

Almost half of the respondents claim to be willing to pay for music they really like (46,0%), which is roughly the same compared to last year (-0,6 percentage points). 3 in 10 Flemings disagree with this item, and are thus not willing at all to pay for music (29,8%). Despite prejudices on this subject, it is not the youngest age segment that shows the least willingness to pay. In fact, it is the oldest age segment (50 years and older) that reports the lowest willingness to pay (33,6%), compared to 15-29 year olds (53,8%) and 30-49 year olds (61,2%). Moreover, the willingness to pay for music has increased compared to last year among Flemings aged 15-29 (+3,4 percentage points).

A quarter of Flemings state preferring to spend money on physical music formats (CD and LP, for instance) than on online music (downloading or streaming music) (25,2%). Over 4 in 10 (totally) disagree with this statement.

OPINION ON RADIO AND MUSIC CONSUMPTION

	(Totally) disagree	Neutral	(Totally) agree
I listen less frequently to radio stations compared to last year	55,7%	23,2%	21,1%
I am satisfied with the content on Flemish radio stations	16,5%	29,7%	53,8%
I am satisfied with the content on Spotify *(of people using Spotify, N=637)*	3,2%	17,4%	79,4%
I am willing to pay for music I really like	29,8%	24,1%	46,0%
I would rather spend money on CDs and LPs than on online music	43,3%	31,5%	25,2%

Radio table 4: 'To what extent do you agree with the following statements?' (on a 5-point scale) (N=2.345, except where indicated otherwise)

SHARE (TOTALLY) AGREEING WITH STATEMENTS – SPLIT BY AGE GROUP

		15-29	30-49	50+	Total
I listen less frequently to radio stations compared to last year	2016	29,8%	20,5%	17,2%	20,8%
	2017	**29,1%**	**21,0%**	**18,0%**	**21,1%**
I am satisfied with the content on Flemish radio stations	2016	48,0%	54,2%	60,0%	55,7%
	2017	**44,0%**	**53,1%**	**58,2%**	**53,8%**
I am satisfied with the content on Spotify *(of people using Spotify, N=637)*	2016	86,5%	85,2%	75,5%	83,9%
	2017	**80,9%**	**79,4%**	**75,9%**	**79,4%**
I am willing to pay for music I really like	2016	50,4%	60,5%	35,8%	46,6%
	2017	**53,8%**	**61,2%**	**33,6%**	**46,0%**
I would rather spend money on CDs and LPs than on online music	2016				
	2017	**23,8%**	**27,1%**	**24,7%**	**25,2%**

Radio table 5: Share (totally) agree with the statements (on a 5-point scale) - split by age group (N=2.345, except where indicated otherwise)

DIGIMETER PROFILES

RADIO & MUSIC

DISRUPTOR (19,6%)

Disruptors are big music fans (63% listen to music every day, compared to 52% in the total population), but that does not mean that they regularly listen to radio broadcasting (47% listen to the radio on a daily basis, compared to 66% in the total population). 29% agree that they listen less frequently to the radio compared to the previous year, which is the highest share among all segments. Moreover, only 38% are satisfied with the programming on Flemish radio stations (total population: 54%). Disruptors mainly consume music through online streaming (63%; total population: 43%) and through downloads (54%; total population: 37%). Disruptors are the least likely segment to listen to CDs (32%). Streaming happens mainly via YouTube (65%) and Spotify (47%). Disruptors are not averse to paying for music streaming services. Half of the Disruptors with Spotify accounts have paid for the service (49%). Moreover, 58% of Disruptors agree that they are willing to pay for music they really like (total population: 46%).

MEDIA MANIAC (19,3%)

Just as with other types of media content, Media Maniacs tend to rely on both traditional and digital sources to listen to radio broadcasting and music. 69% of Media Maniacs listen every day to radio broadcasting (total population: 66%). This happens mainly through the use of more traditional devices such as a radio set (FM/AM receiver) at home (64%; total population: 63%) or a car radio (65%; total population: 47%). But this segment also shows the highest use of internet radio, with 37% listening via computer (total population: 20%), 37% via smartphone (total population: 16%) and 18% via the tablet (total population: 7%). Overall, they are satisfied with the content broadcasted by Flemish radio stations (54%; total population: 53%)).
71% of Media Maniacs listen to music on a daily basis, in addition to radio broadcasting (total population: 52%). They use a mix of online streaming (84%; total population: 43%), downloads (66%; total population: 37%) and CDs (37%; total population: 41%) to consume music. Just as with paying for movies and series (see TV & Video chapter), they show the highest willingness to pay for music they really like (66%, compared to 46% in the total population).

AUGMENTED TRADITIONALIST (19,5%)

Radio broadcasting is still an important aspect of the media lives of Augmented Traditionalists, as 72% listen to the radio on a daily basis (total population: 66%). In contrast to the 72% who listen to the radio on a daily basis, 52% listen to music through other sources. This is at par with the total population (52%), but well below Media Maniacs (71%) and Disruptors (63%). Consuming music mainly happens through online streaming (48%; total population: 43%), downloads (42%; total population: 37%) and CDs (42%; total population: 41%). Augmented Traditionalists are satisfied with Flemish radio stations (58%, compared to 54% in the total population).

STRUGGLER (22,7%)

Despite the fact that Strugglers seem to be discovering alternative forms of watching TV and video content (see earlier chapters), they are still predominantly traditional in the way they consume radio and music content. 76% listen to radio every day (total population: 66%). This is mainly done using traditional devices such as a radio set (FM/AM receiver) at home (75%; total population: 63%) and a car radio (54%; total population: 47%). Overall, Strugglers are more satisfied with Flemish radio stations than any other segment (66%; total population: 54%).
With only 39% of the Strugglers listening to music on a daily basis apart from radio broadcasting, music consumption is relatively low in this segment (total population: 52%). However, they do listen to CDs more frequently than any other segment (54%; total population: 41%). The use of online streaming (16%; total population: 43%) and downloads (21%; total population: 37%) is a less common practice among Strugglers. Moreover, this is the only segment in which downloading music is still more prevalent than streaming music. Only 38% of Strugglers claim to be willing to pay for music they really like (compared to 46% in the total population). Moreover, they show the highest agreement that they would rather pay for CDs or LPs than for online music (34%; total population: 25%).

RESISTOR (18,9%)

Resistors stick by the traditional method of listening to radio stations. 64% listen to the radio every day (total population: 66%), mainly through a traditional radio set at home (63%) or a car radio (16%). Other devices are seldom used to listen to radio broadcasting.

Apart from listening to the radio, Resistors listen less frequently to music compared to other segments (36% listen every day to music, compared to 52% within the total population). When they do listen to music, this is most commonly by playing a CD (40%; total population: 41%). They are less familiar with online music platforms, as only 6% have listened to music via online music streaming (total population: 43%) and 7% downloaded music files at least once per month (total population: 37%). As they mainly consume music through radio broadcasting, their willingness to pay for music they really like is relatively low (21%, compared to 46% in the total population).

Listening to radio broadcasting/music (daily basis)

	Radio stations	Music *(apart from radio boadcasting)*
Disruptor	47%	63%
Media Maniac	69%	71%
Augmented Traditionalist	72%	52%
Struggler	76%	39%
Resistor	64%	36%

Devices for listening to radio (monthly basis)

	Radio set *(FM/AM receiver)*	Computer	Smartphone	Tablet	Car radio	DAB/DAB+ set	TV set *(e.g. radio channels on digital TV)*
Disruptor	47%	20%	19%	5%	39%	4%	12%
Media Maniac	64%	37%	37%	18%	65%	8%	34%
Augmented Traditionalist	65%	23%	20%	6%	57%	7%	28%
Struggler	75%	15%	7%	6%	54%	6%	27%
Resistor	63%	4%	1%	2%	16%	1%	13%

Sources for listening to music (apart from radio broadcasting) on a monthly basis

	CD	LP	Downloads	Thematic channels on digital TV *(e.g. Jazz channel, 70's channel)*	Online streaming	Total online music *(streaming + downloading)*
Disruptor	32%	12%	54%	4%	63%	80%
Media Maniac	37%	10%	66%	16%	84%	95%
Augmented Traditionalist	42%	11%	42%	13%	48%	67%
Struggler	54%	9%	21%	10%	16%	30%
Resistor	40%	7%	7%	6%	6%	13%

Platforms used for online music *(within those who consume music online)* on a monthly basis

	YouTube	Spotify	Apple Music	Soundcloud	Shazam	iTunes
Disruptor	65%	42%	7%	11%	10%	7%
Media Maniac	77%	62%	13%	15%	25%	15%
Augmented Traditionalist	47%	27%	4%	4%	8%	8%
Struggler	17%	7%	2%	1%	1%	3%
Resistor	9%	1%	0%	0%	0%	0%

Statements (% (totally) agree)

	I listen less frequently to radio stations compared to last year	I am willing to pay for music I really like	Satisfied with the Flemish radio stations	Rather spend money on CDs and LPs than on online music
Disruptor	29%	58%	38%	26%
Media Maniac	24%	66%	54%	22%
Augmented Traditionalist	18%	49%	58%	25%
Struggler	15%	38%	66%	34%
Resistor	20%	21%	51%	19%

CHAPTER 04

NEWS CONSUMPTION

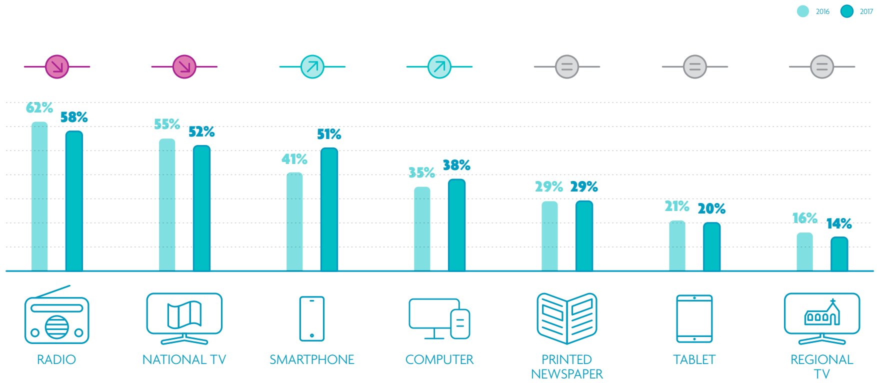
IMEC.DIGIMETER INFOGRAPHIC

NEWS CONSUMPTION

News sources and attitudes towards news strongly dependent on age

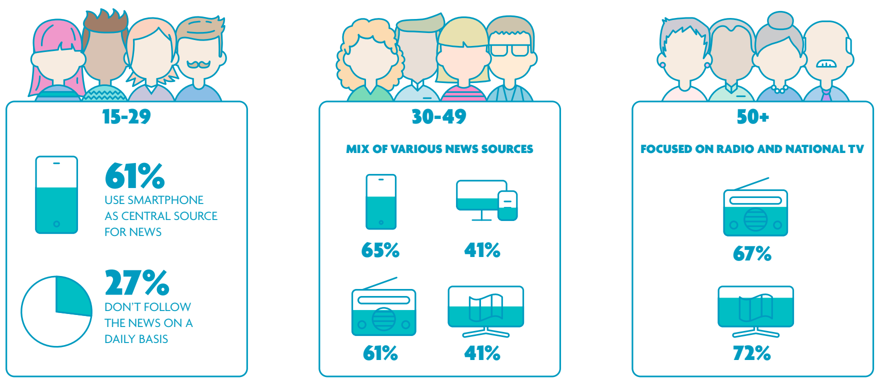
DAILY NEWS CONSUMPTION

Strong growth in the smartphone as daily news source



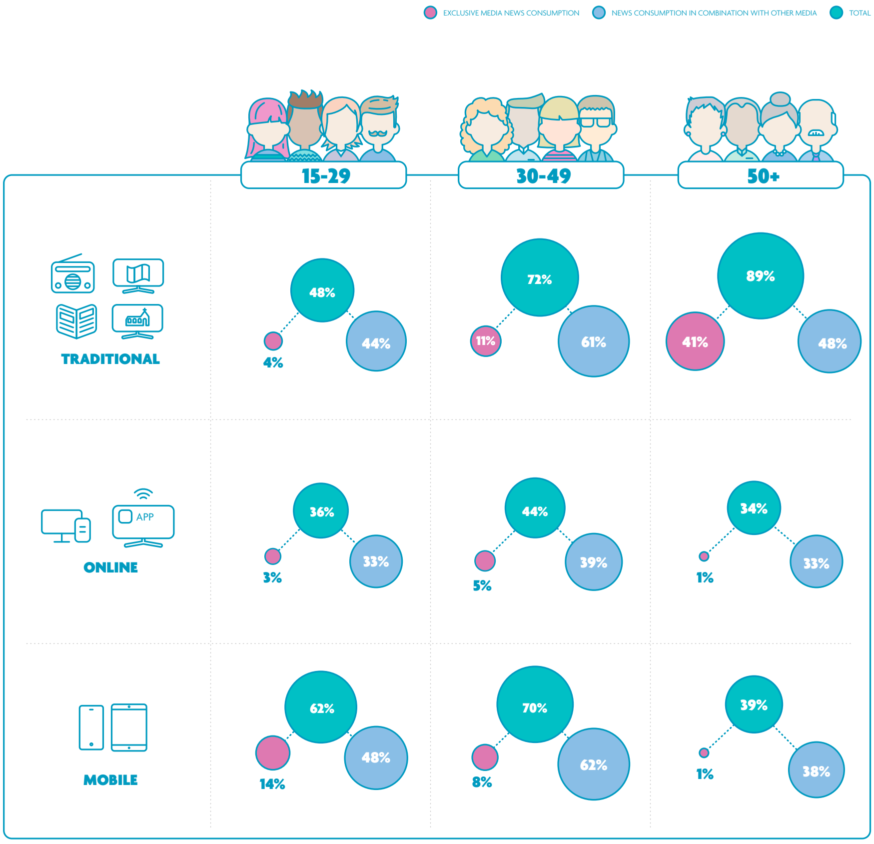
NEWS CONSUMPTION BY AGE SEGMENT

Sources used for news consumption depend on age



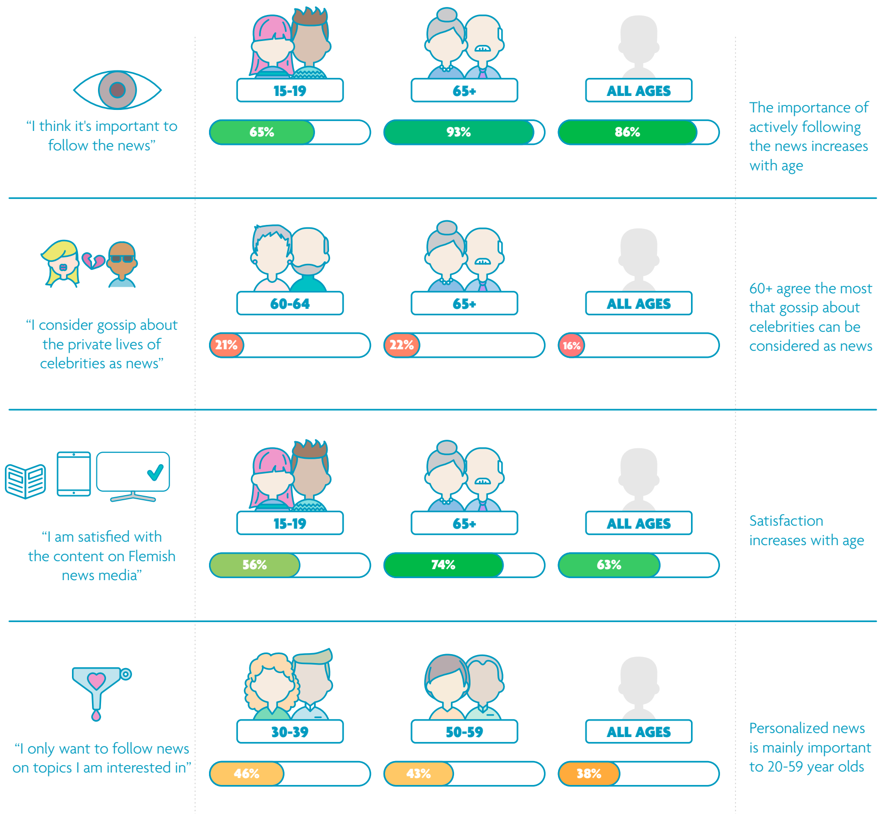
TRADITIONAL VS. ONLINE VS. MOBILE NEWS CONSUMPTION

Popularity of traditional media is higher for older age categories



STATEMENTS

News consumption, satisfaction & topics



NEWS CONSUMPTION

SOURCES FOR FOLLOWING THE NEWS

CARRIERS/DEVICES FOR FOLLOWING THE NEWS

The carriers and devices used to monitor the news have shifted towards more mobile news. Half of the Flemish population uses a smartphone to monitor the news on a daily basis (50,6%), which is a significant increase compared to 2016 (+9,5 percentage points). As such, just as last year, the smartphone remains a daily gateway to news for more Flemings than the computer (38,2%, +3,0 percentage points). As a result of the remarkable increased daily use of the smartphone for news consumption, the smartphone is gaining on traditional news sources such as radio (58,3%, -3,3 percentage points) and national TV stations (52,2%, -2,3 percentage points). Reading newspapers on a daily basis remains stable at about 3 in 10 Flemings (29,0%, -0,2 percentage points) claiming to do so.

The smartphone has become the main news source for Flemings younger than 49 years old. For 40-49 year old Flemings, the smartphone shares first place with the radio as a daily news source (smartphone: 65,3%, +12,8 percentage points; radio: 65,1%, -1,3 percentage points). News programming on national TV stations reaches over 7 in 10 of Flemings aged 60 years and older on a daily basis. However, traditional news carriers, particularly radio and national TV broadcasting, are a daily source of news for a decreasing share of Flemings aged 60+ (radio: -16,6 percentage points among 60-64 year olds and -5,7 percentage points among 65+; national TV: -2,5 percentage points among 60-64 year olds and -8,5 percentage points among 65+). The printed newspaper is a daily source of news updates for over 4 in 10 Flemings aged 60 years and older. Overall, 87,8% of Flemings use at least one of the listed news carriers on a daily basis (-1,7 percentage points). This is lowest among 15-19 year old Flemings, where only 58,9% follow the news on a daily basis (-6,1 percentage points). This can be linked to the fact that the youngest age group also attaches the least importance to (actively) following the news (see table 5).

3 in 4 Flemings use a traditional news source (radio, TV, printed press) on a daily basis (73,7%, -4,2 percentage points). It is remarkable that the share of Flemings that use traditional news media as their sole news source has decreased significantly in the last three years (from 33,3% in 2015 to 27,7% in 2016 and to 22,6% in 2017). It seems that, within all age groups, there is a shift from exclusively using traditional news media towards combinations of traditional news media and online and/or mobile news carriers.

The use of online news sources on a daily basis has increased slightly from 37,1% in 2016 to 39,0% in 2017 (+1,9 percentage points). However, among 15-29 year olds, the daily use of online news media has decreased by 2,6 percentage points to 35,9%. Only a small percentage exclusively uses online news sources on a daily basis (4,0%). Most people who use online news sources on a daily basis also use a mix of traditional and mobile news sources on a daily basis (22,8%, +1,9 percentage points).
The use of mobile news sources has increased by 2,9 percentage points (from 50,2% in 2016 to 53,1% in 2017). All age groups experienced an increased use of mobile news sources. The largest share of people using mobile news sources as the single gateway to news on a daily basis is found among 15-29 year old Flemings (13,7%, up from 11,9% in 2016).

CARRIERS/DEVICES FOR FOLLOWING THE NEWS

	Ever			Monthly			Daily		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
Radio	85,0%	87,0%	**85,2%**	74,6%	79,3%	**76,2%***	58,9%	61,6%	**58,3%***
National TV stations	85,1%	87,0%	**83,5%**	77,5%	79,5%	**75,9%***	56,8%	54,5%	**52,2%**
Smartphone	54,3%	64,5%	**74,7%***	44,5%	55,8%	**60,5%***	29,3%	41,1%	**50,6%***
Computer	69,6%	70,8%	**74,0%***	58,6%	60,2%	**67,1%***	35,2%	35,2%	**38,2%***
Printed newspaper	77,9%	74,6%	**75,6%**	55,1%	53,5%	**53,7%**	31,5%	29,2%	**29,0%**
Tablet	45,9%	47,7%	**55,7%***	35,3%	37,7%	**40,8%***	19,3%	21,2%	**20,2%**
Regional TV stations	70,3%	61,8%	**57,6%***	43,8%	40,8%	**34,1%***	21,1%	16,2%	**13,7%***
Apps on smart TV		13,5%	**20,3%***		8,3%	**12,4%***		4,4%	**7,5%***
Printed magazine		69,0%	**70,3%**		39,7%	**40,1%**		3,9%	**3,9%**
Smartwatch		1,3%	**4,3%***		0,7%	**2,1%**		0,2%	**0,8%**

News table 1: 'How frequently do you use the following carriers/devices to follow the news?' (N=2.345)

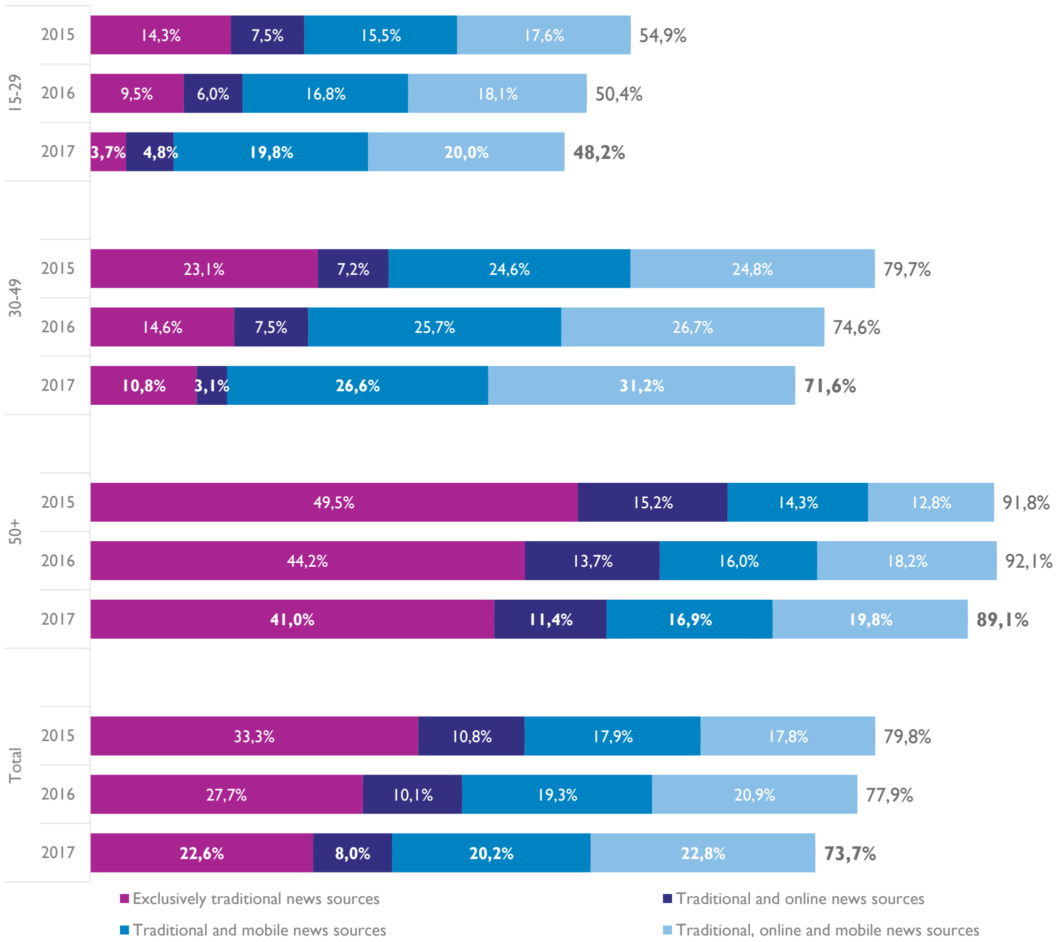
* Statistically significant change compared to the previous year, based on a chi-square test.

CARRIERS/DEVICES FOR FOLLOWING THE NEWS ON A DAILY BASIS - SPLIT BY AGE GROUP

		15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Radio	2016	32,1%	39,5%	59,9%	66,4%	65,3%	78,5%	73,2%	61,6%
	2017	**30,2%**	**36,3%**	**55,5%**	**65,1%**	**67,3%**	**61,9%**	**67,5%**	**58,3%**
National TV stations	2016	19,2%	27,8%	35,4%	52,9%	60,9%	74,2%	83,4%	54,5%
	2017	**19,9%**	**19,3%**	**31,2%**	**50,8%**	**67,8%**	**71,7%**	**75,0%**	**52,2%**
Smartphone	2016	49,7%	60,1%	62,0%	52,5%	39,0%	22,3%	13,0%	41,1%
	2017	**55,3%**	**62,4%**	**64,9%**	**65,3%**	**43,5%**	**30,1%**	**21,3%**	**50,6%**
Computer	2016	21,5%	42,5%	43,5%	36,3%	36,6%	32,9%	28,2%	35,2%
	2017	**19,8%**	**41,2%**	**41,5%**	**41,0%**	**39,1%**	**41,1%**	**35,4%**	**38,2%**
Printed newspaper	2016	13,6%	11,0%	13,4%	25,1%	39,0%	44,4%	45,7%	29,2%
	2017	**4,7%**	**11,3%**	**13,5%**	**18,6%**	**40,8%**	**42,1%**	**48,6%**	**29,0%**
Tablet	2016	6,4%	13,9%	20,2%	28,3%	29,5%	29,1%	16,8%	21,2%
	2017	**17,7%**	**10,3%**	**23,5%**	**25,8%**	**27,6%**	**22,6%**	**13,9%**	**20,2%**
Regional TV stations	2016	1,0%	3,6%	6,9%	13,6%	13,0%	20,5%	37,3%	16,2%
	2017	**0,9%**	**1,3%**	**6,3%**	**8,5%**	**17,2%**	**24,9%**	**25,8%**	**13,7%**
App on smart TV	2016	7,2%	6,1%	4,9%	5,6%	3,8%	0,4%	3,0%	4,4%
	2017	**7,8%**	**5,1%**	**10,5%**	**8,5%**	**7,9%**	**8,6%**	**5,7%**	**7,5%**
Printed magazine	2016	0,7%	1,0%	1,9%	1,7%	5,7%	10,7%	5,9%	3,9%
	2017	**1,8%**	**0,5%**	**0,3%**	**1,5%**	**4,8%**	**8,9%**	**7,7%**	**3,9%**
Smartwatch	2016	0,4%	0,7%	0,4%	0,0%	0,2%	0,0%	0,0%	0,2%
	2017	**0,0%**	**0,0%**	**1,1%**	**1,2%**	**0,0%**	**0,0%**	**1,8%**	**0,8%**
Any news source	2016	65,0%	82,2%	88,3%	89,2%	93,1%	98,7%	96,4%	89,5%
	2017	**58,9%**	**79,4%**	**86,4%**	**90,8%**	**91,4%**	**95,3%**	**93,7%**	**87,8%**

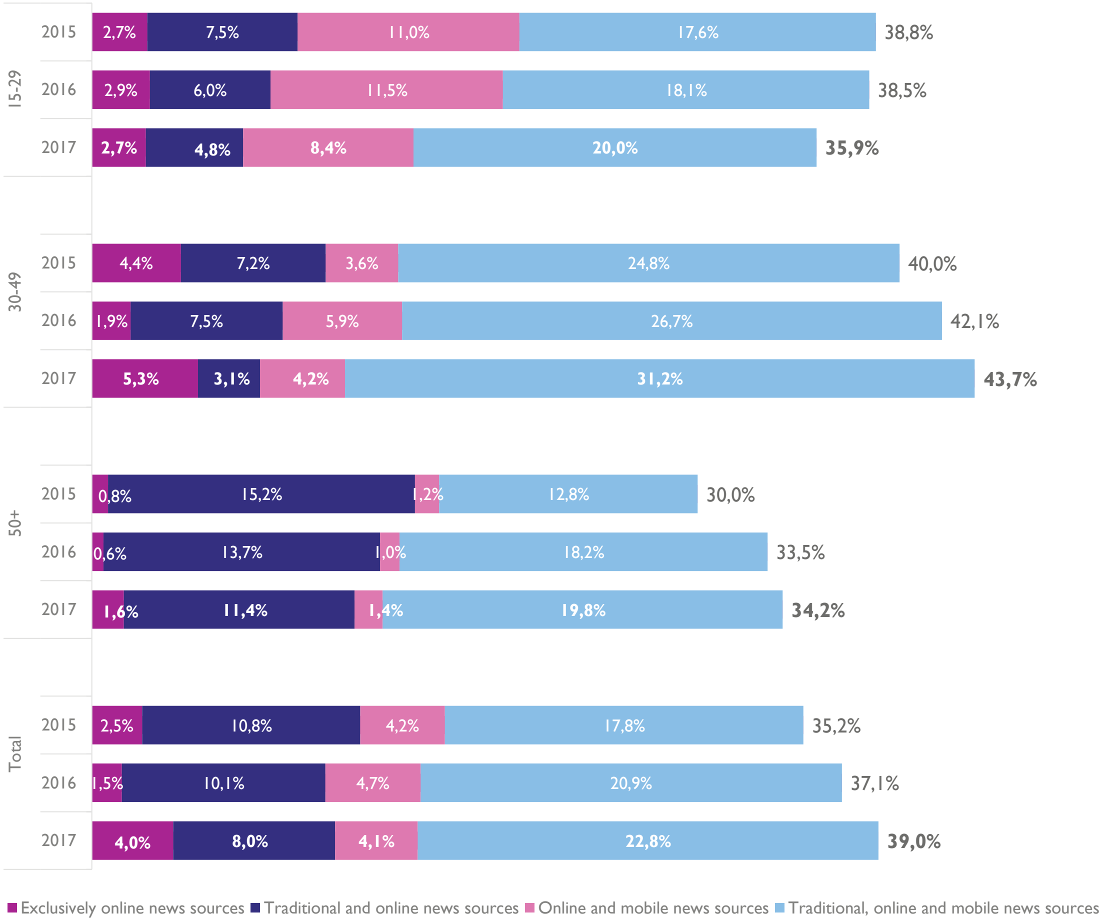
News table 2: 'How frequently do you use the following carriers/devices to follow the news?' (% on daily basis) - split by age group (N=2.345)

TRADITIONAL NEWS CARRIERS AS SOLE NEWS SOURCE VS. IN COMBINATION WITH ONLINE/MOBILE CARRIERS ON A DAILY BASIS - SPLIT BY AGE GROUP



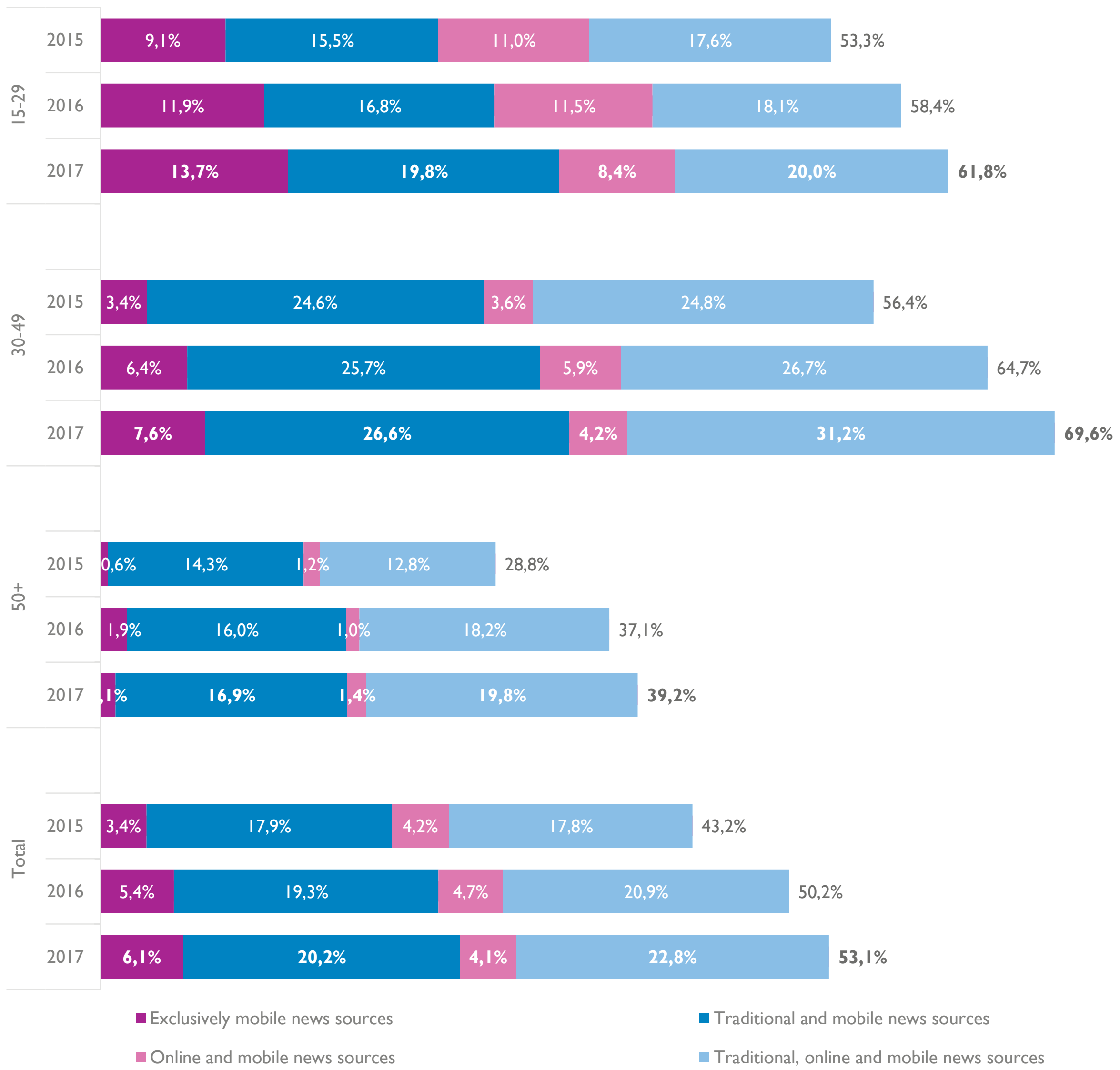
News graph 1: Consumption of traditional news carriers on a daily basis - split by traditional news sources as sole news source vs. in combination with online/ mobile news carriers (traditional news carriers: printed newspaper and news magazine, TV broadcasting, radio broadcasting; online news carriers: computer and app on smart TV; mobile news consumption: smartphone, tablet and smartwatch) - split by age group (N=2.345)

ONLINE NEWS CARRIERS AS SOLE NEWS SOURCE VS. IN COMBINATION WITH TRADITIONAL/MOBILE SOURCES ON A DAILY BASIS - SPLIT BY AGE GROUP



News graph 2: Consumption of online news carriers on a daily basis - split by online news sources as sole news source vs. in combination with traditional/mobile news sources (traditional news carriers: printed newspaper and news magazine, TV broadcasting, radio broadcasting; online news carriers: computer and app on smart TV; mobile news consumption: smartphone, tablet and smartwatch) - split by age group (N=2.345)

MOBILE NEWS CARRIERS AS SOLE NEWS SOURCE VS. IN COMBINATION WITH TRADITIONAL/ONLINE CARRIERS ON A DAILY BASIS - SPLIT BY AGE GROUP



News graph 3: Consumption of mobile news carriers on a daily basis - split by mobile news carriers as sole news source vs. in combination with traditional/online news carriers (traditional news sources: printed newspaper and news magazine, TV broadcasting, radio broadcasting; online news carriers: computer and app on smart TV; mobile news consumption: smartphone, tablet and smartwatch) - split by age group (N=2.345)

DIGITAL NEWS SOURCES

Almost 3 in 4 Flemings claim to have used a digital device[23] to consult news (73,5%). For the sake of convenience, we will refer to this subgroup of the population as 'digital news consumers' in this section.

86,6% of digital news consumers visit a news website at least once per month, a decrease of 2,7 percentage points compared to 2016. Over 6 in 10 digital news consumers use a computer (62,0%, +10,0 percentage points), over 4 in 10 use a smartphone (42,7%, -1,6 percentage points) to reach a news website. In 2016, a quarter of Flemish digital news consumers visited news sites with a tablet (24,5%). In 2017, this figure has dropped to 1 in 6 (15,6%, -8,9 percentage points).

Fewer than 4 in 10 digital news consumers read a digital, downloadable version of a newspaper (36,7%, -2,2 percentage points compared to last year). The use of a computer (21,5%, +5,0 percentage points) or a smartphone (13,6%, +2,9 percentage points) has increased, while reading a downloadable version of a newspaper on a tablet attracts fewer people compared to 2016 (8,2%, 14,6 percentage points).

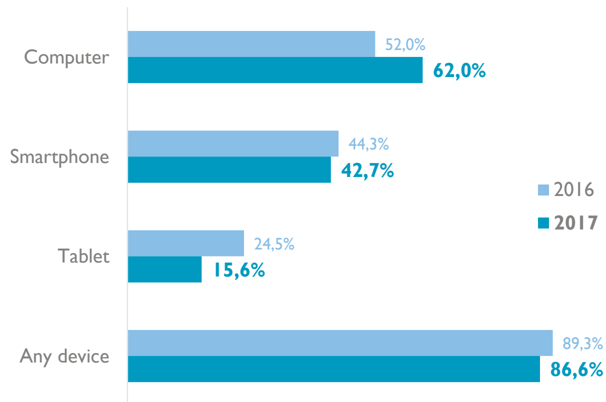
Almost 7 in 10 digital news consumers state that they consider social media a news source (68,7%). This figure has not changed significantly compared to 2016 (-1,1 percentage points). 4 in 10 digital news consumers monitor the news on social media through a smartphone (41,0%, +0,6 percentage points), while 47,4% use a computer to do so (+4,5 percentage points).

Search engines (e.g. Google, Bing) remain important sources of news on a specific subject. 3 in 4 of Flemish digital news consumers search for news via search engines on a monthly basis (74,4%, -1,9 percentage points). Most commonly, this is done on a computer (59,5%, a non-significant decrease of 1,8 percentage points compared to 2016). The use of a smartphone remains stable (36,4%, +1,9 percentage points), while the use of a tablet decreased by 6,9 percentage points to 15,1%.

Personalized news apps still seem to have trouble reaching a substantial amount of users in Flanders. 8,4% of Flemish digital news consumers report having used an app with a personalized selection of news (e.g. Flipboard) (-0,8 percentage points).

Actively monitoring the news through digital sources has hit a low among 15-19 year olds, with a remarkable decrease in visiting news websites (-9,8 percentage points), digital newspapers (-13,7 percentage points), social media (-11,2 percentage points) and search engines (-10,7 percentage points). Using social media for news consumption is highest among digital news consumers in their twenties (90,8%), while visiting news websites is highest among Flemish digital news consumers aged 30-39 years old (93,4%).

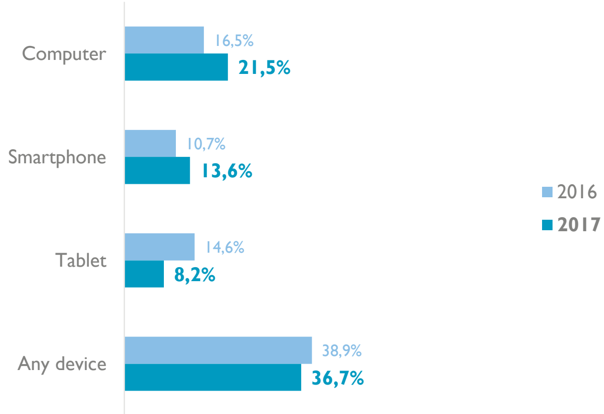
DIGITAL NEWS SOURCES USED IN THE LAST MONTH – NEWS WEBSITES



News graph 4: 'Which devices did you use to follow digital news sources during the past month?' - news websites (of people who have used at least 1 digital device to consult the news in the past month; N=1.723)

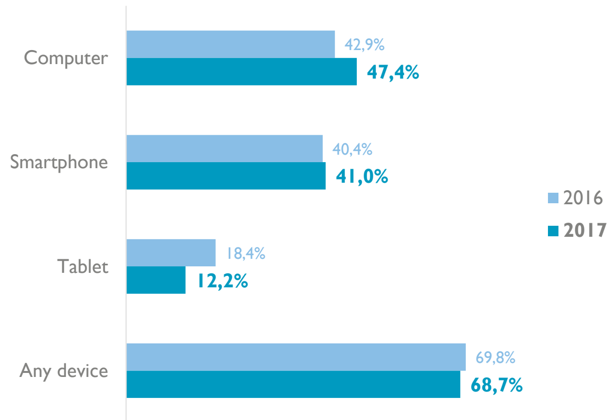
23 Computer (desktop or laptop), smartphone, tablet, app on smart TV or smartwatch.

DIGITAL NEWS SOURCES USED IN THE LAST MONTH – DOWNLOADABLE DIGITAL NEWSPAPER



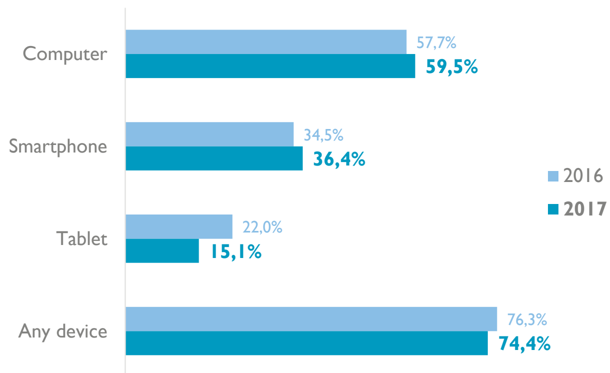
News graph 5: 'Which devices did you use to follow digital news sources during the past month?' - downloadable digital newspaper, e.g. PDF-version (of people who have used at least 1 digital device to consult the news in the past month; N=1.723)

DIGITAL NEWS SOURCES USED IN THE LAST MONTH – SOCIAL MEDIA



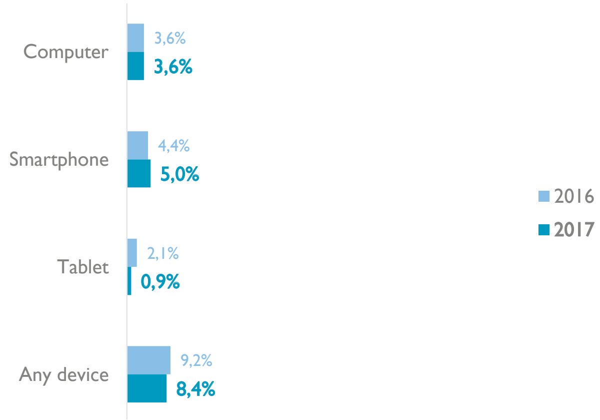
News graph 6: 'Which devices did you use to follow digital news sources during the past month?' - social media (of people who have used at least 1 digital device to consult the news in the past month; N=1.723)

DIGITAL NEWS SOURCES USED IN THE LAST MONTH – SEARCH ENGINE



News graph 7: 'Which devices did you use to follow digital news sources during the past month?' - search engine, e.g. Google (of people who have used at least 1 digital device to consult the news in the past month; N=1.723)

DIGITAL NEWS SOURCES USED IN THE LAST MONTH – PERSONALIZED NEWS APP



News graph 8: 'Which devices did you use to follow digital news sources during the past month?' - personalized news app, e.g. Flipboard, Zite (of people who have used at least 1 digital device to consult the news in the past month; N=1.723)

DIGITAL NEWS SOURCES USED IN THE LAST MONTH (ANY DEVICE) - SPLIT BY AGE GROUP

		15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
News websites	2016	88,3%	93,2%	95,2%	89,6%	89,3%	83,3%	80,2%	89,3%
	2017	**78,5%**	**89,1%**	**93,4%**	**89,4%**	**88,3%**	**86,6%**	**74,9%**	**86,6%**
Downloadable, digital newspaper	2016	36,1%	31,2%	38,4%	40,4%	42,5%	44,2%	48,6%	38,9%
	2017	**22,4%**	**25,2%**	**34,6%**	**39,8%**	**44,4%**	**41,3%**	**43,7%**	**36,7%**
Social media	2016	88,5%	92,0%	82,3%	68,8%	63,5%	53,0%	33,7%	69,8%
	2017	**77,3%**	**90,8%**	**82,8%**	**72,5%**	**56,9%**	**45,4%**	**43,7%**	**68,7%**
Search engine *(e.g. Google)*	2016	80,8%	78,8%	77,8%	78,4%	75,4%	76,0%	67,5%	76,3%
	2017	**70,1%**	**73,9%**	**78,4%**	**74,8%**	**76,9%**	**75,5%**	**68,4%**	**74,4%**
Personalised news app *(e.g. Flipboard)*	2016	15,0%	12,8%	10,1%	12,4%	4,6%	3,0%	5,0%	9,2%
	2017	**15,2%**	**8,3%**	**12,7%**	**9,1%**	**6,9%**	**4,8%**	**3,4%**	**8,4%**

News table 3: 'Which devices did you use to follow digital news sources during the past month?' (% any device) - split by age group (of people who have used at least 1 digital device to consult the news in the past month; N=1.723)

OPINION ON NEWS CONSUMPTION

A large majority of Flemings still attach high importance to following the news. 86,0% of the Flemish population agrees that following the news is important. However, we do see a remarkable relationship with age. Following the news seems to gain importance with increasing age. 'Only' 65,3% of Flemings aged 15-19 years old think it is important to follow the news; among Flemings aged 50 years and older, this is at least 9 in 10. This could indicate that a substantial portion of the youngest generation merely considers following the news a 'by-product' of their general (social) media consumption, pointing to a more passive approach to following the news.

1 in 6 Flemings consider gossip about the private lives of celebrities as news (16,2%). It is interesting to note that this figure seems to peak within the oldest age segments (60-64: 20,8%; 65+: 21,5%). Among Flemings aged 15-19 years old, this figure has dropped 5,0 percentage points compared to last year. But with still 18,9% of teens agreeing to this statement, gossip is still more accepted as news among 15-19 year olds than among 20-59 year olds.

Overall, Flemings seem to appreciate the news coverage by Flemish news media. 62,5% of Flemings indicate satisfaction with the content on Flemish news media. This figure seems to persist across all age groups.

Over 1 in 3 Flemings say that they only want to follow news on topics in which they are interested (37,6%). Remarkably, while last year we saw a that particularly the youngest age segments agreed with this statement, we now see that this is more level across the different age groups. Among the youngest age segments, the need for personalized news based on their interests dropped by 16,0 percentage points among 15-19 year olds and by 6,4 percentage points among 20-29 year olds. Among the oldest age groups, on the other hand, we see the opposite evolution, with an increase of 11,6 percentage points among 60-64 year olds and 9,9% among 65+.

OPINION ON NEWS CONSUMPTION

	(Totally) disagree	Neutral	(Totally) agree
I think it's important to follow the news	5,6%	8,4%	86,0%
I consider gossip about the private lives of celebrities as news	57,4%	26,4%	16,2%
I am satisfied with the content on Flemish news media	11,2%	26,3%	62,5%
I only want to follow news on topics I am interested in	32,0%	30,4%	37,6%

News table 4: 'To what extent do you agree with the following statements?' (on a 5-point scale) (N=2.345)

SHARE (TOTALLY) AGREE WITH STATEMENTS – SPLIT BY AGE GROUP

		15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
I think it's important to follow the news	2016	65,4%	79,5%	81,6%	89,0%	85,2%	90,5%	93,6%	85,5%
	2017	**65,3%**	**79,4%**	**81,0%**	**84,3%**	**90,6%**	**95,7%**	**92,7%**	**86,0%**
I consider gossip about the private lives of celebrities as news	2016	23,9%	12,5%	14,3%	15,1%	17,0%	12,7%	21,2%	16,8%
	2017	**18,9%**	**13,2%**	**15,6%**	**12,5%**	**12,3%**	**20,8%**	**21,5%**	**16,2%**
I am satisfied with the content on Flemish news media	2016	56,7%	52,3%	56,6%	63,7%	63,5%	64,7%	61,8%	60,2%
	2017	**56,1%**	**53,5%**	**56,1%**	**59,9%**	**68,7%**	**62,4%**	**70,4%**	**62,5%**
I only want to follow news on topics I am interested in	2016	50,4%	45,9%	47,0%	36,8%	38,0%	22,3%	20,2%	35,8%
	2017	**34,4%**	**39,5%**	**45,8%**	**36,8%**	**42,9%**	**33,9%**	**30,1%**	**37,6%**

News table 5: Share (totally) agree with the statements (on a 5-point scale) - split by age group (N=2.345)

DIGIMETER PROFILES

NEWS CONSUMPTION

DISRUPTOR (19,6%)

Disruptors are not the biggest fans of actively following the news. 72% of Disruptors think following the news is important, which is the lowest proportion of all segments (total population: 86%). Traditional news media platforms in particular, such as the printed newspaper (11%; total population: 29%), national TV stations (15%; total population: 52%) and radio stations (34%; total population 58%), are not likely to be used on a daily basis. If they do follow the news on a daily basis, this is most commonly done on a smartphone (54%; total population: 51%). Disruptors rely as much on social media for news consumption (78%; total population: 69%) as on news websites (82%; total population: 87%). This segment is the least satisfied with the content on Flemish news media (47%, compared to 63% in the total population).

MEDIA MANIAC (19,3%)

Media Maniacs are news junkies. Although they rely on a mix of traditional and digital sources to keep up to date, they do have a preference for digital news sources. The radio (63%, compared to 58% in the total population), the computer (55%; total population: 38%) and national TV broadcasting (48%; total population: 52%) are substantial ingredients in the daily news diet of this segment. However, the main device for following the news is the smartphone, with 84% of the Media Maniacs using this device on a daily basis for news consumption (compared to 51% of the total population). Social media (91%; total population: 69%) and news websites (96%; total population 87%) are used by over 9 in 10 Media Maniacs on a monthly basis. They do attach high importance to following the news, as 91% agree that following the news is important (total population: 86%). Flemish news media offer high-quality content, according to the majority of Media Maniacs (63%, at par with the total population).

AUGMENTED TRADITIONALIST (19,5%)

Augmented Traditionalists do use smartphones (52%; total population: 51%) and computers (41%; total population: 38%) on a daily basis to monitor the news, but traditional formats such as national TV stations (59%; total population: 52%) and radio stations (64%; total population: 58%) are still more prevalent. 88% of the Augmented Traditionalists state to be satisfied with the quality of Flemish news media (total population: 86%). The most common digital media sources are news websites (88%; total population: 87%), social media (81%; total population: 69%) and search engines (76%; total population: 74%).

STRUGGLER (22,7%)

Strugglers keep very close track of daily news, more than any other segment. 94% agree that it is important to follow the news, which is higher than any other segment (total population: 86%). Strugglers are also the most satisfied with Flemish news media (76%; total population: 63%). Traditional news sources are more popular among Strugglers than any other segment. 82% follow the news on national TV broadcasting every day (total population: 52%), and 74% do so through the radio (total population: 58%). 45% of Strugglers read the newspaper every day (total population: 29%). The daily use of a computer (47%) and tablet (28%) is also more prevalent among Strugglers than within the total population (38% and 20%, respectively), but less prevalent than among Media Maniacs (55% and 36%, respectively). Although the smartphone is less of a daily gateway to news for Strugglers (37%) compared to the average in the total population (51%), it is still a more likely gateway to news than a tablet (28%) or regional TV stations (28%, total population: 14%).

RESISTOR (18,9%)

Resistors are less fanatic when it comes to following the news. With 83% of Resistors agreeing that following the news is important, this segment scores below average (86%). In fact, it is the second lowest score of all segments, with only Disruptors scoring lower (72%). The news diet of Resistors consists solely of traditional news formats. They rely on radio (54%; total population: 58%), national TV broadcasting (52%, which is the same as within the total population) and printed newspapers (44%; total population 29%). Online and mobile news sources are disregarded, as merely 6% use a smartphone every day to follow the news (total population: 51%), 6% use a computer (total population: 38%) and 1% use a tablet (total population: 20%). Furthermore, only 28% are interested only in receiving updates on topics they are interested in, which is lower than any other segment (total population: 38%). This is also the segment that agrees the most that gossip about the private lives of celebrities is newsworthy (21%, compared to 16% in the total population).

Sources/devices to follow the news (daily basis)

	National TV broadcasting	Regional TV broadcasting	Radio	Printed newspaper	Computer	Smartphone	Tablet
Disruptor	15%	2%	34%	11%	36%	54%	14%
Media Maniac	48%	9%	63%	17%	55%	84%	36%
Augmented Traditionalist	59%	14%	64%	25%	41%	52%	22%
Struggler	82%	28%	74%	45%	47%	37%	28%
Resistor	52%	14%	54%	44%	6%	6%	1%

Digital news sources

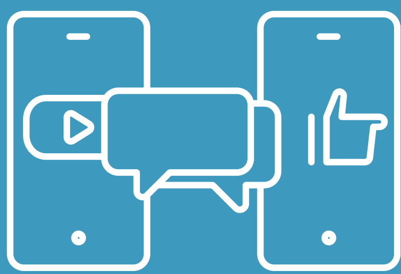
	News websites	Digital, downloadable newspaper	Social media	Search engine	Personalized news app
Disruptor	82%	27%	78%	71%	10%
Media Maniac	96%	46%	91%	84%	14%
Augmented Traditionalist	88%	37%	81%	76%	7%
Struggler	84%	40%	35%	72%	4%
Resistor	65%	17%	20%	46%	2%

Statements (% (totally) agree)

	I think it's important to follow the news	I consider gossip about the private life of celebrities as news	Satisfied with the Flemish news media	I only want to follow news on topics I am interested in
Disruptor	72%	11%	47%	42%
Media Maniac	91%	16%	63%	42%
Augmented Traditionalist	88%	19%	66%	40%
Struggler	94%	15%	76%	37%
Resistor	83%	21%	59%	28%

CHAPTER 05

SOCIAL MEDIA



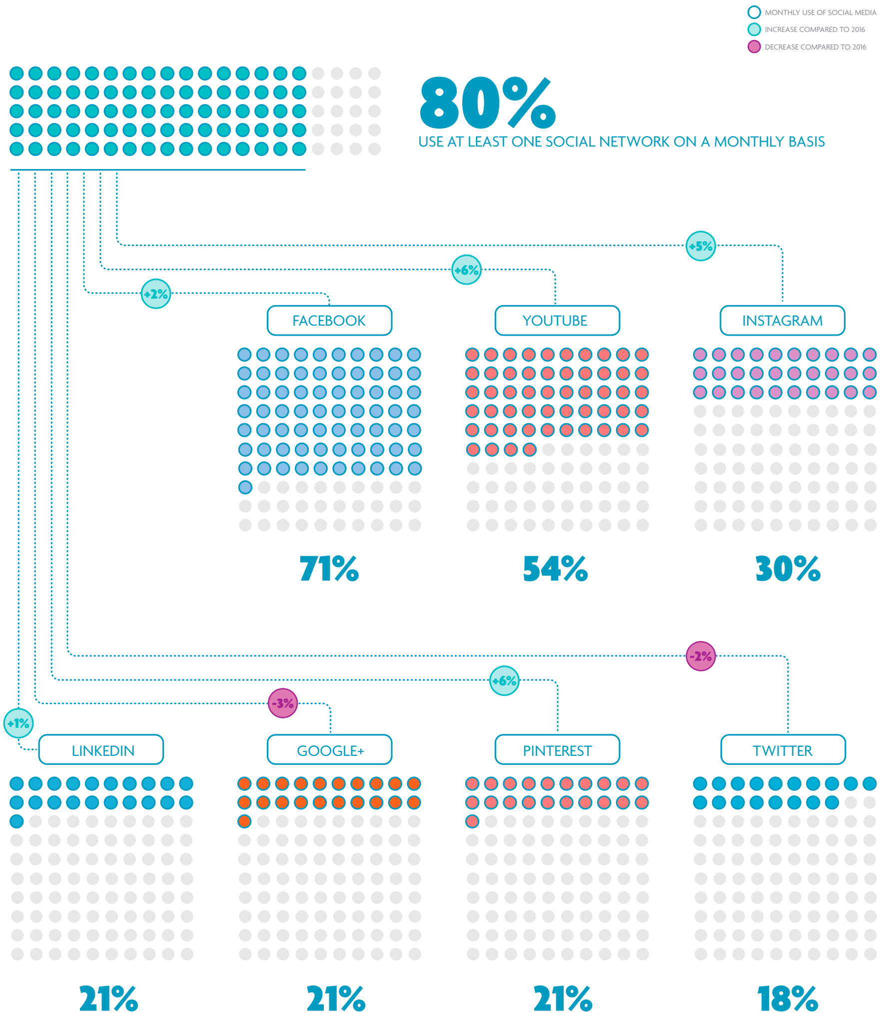
IMEC.DIGIMETER INFOGRAPHIC

SOCIAL MEDIA

YouTube surpasses Facebook among teens

SOCIAL MEDIA USE

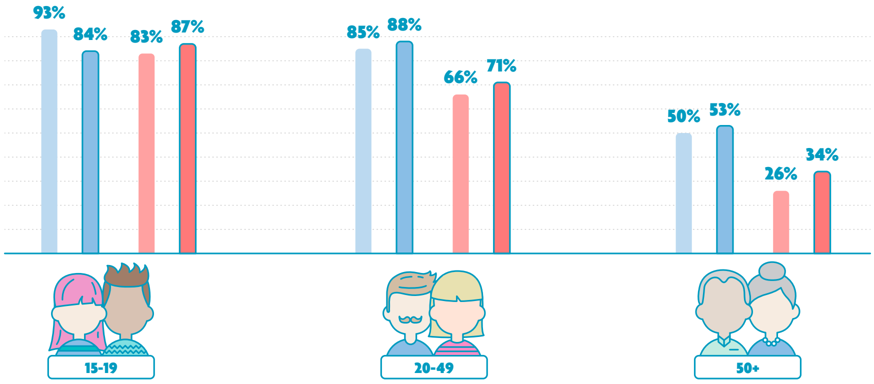
Social media used on a monthly basis



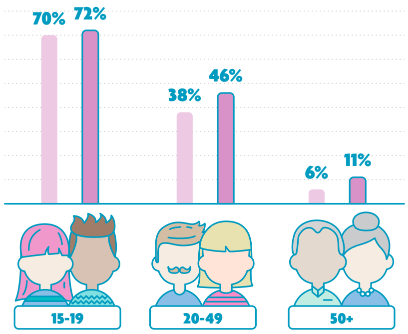
USE BY AGE

YouTube becomes #1 for teenagers

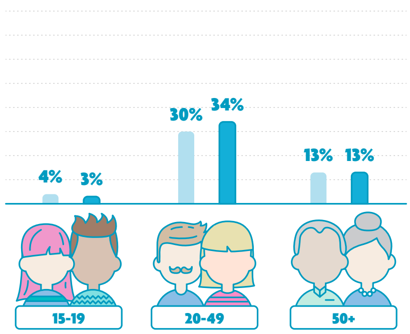
Facebook rapidly drops in popularity among teens, losing its #1 position to YouTube



Strong growth of Instagram in 20-49 segment

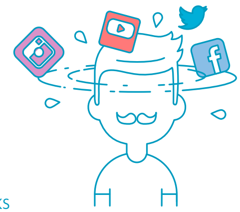


LinkedIn most popular among workers



MULTIPLE SOCIAL MEDIA NETWORKS

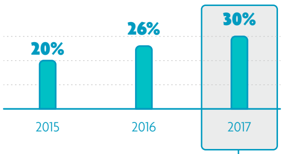
Evolution of using at least 4 social media networks per month

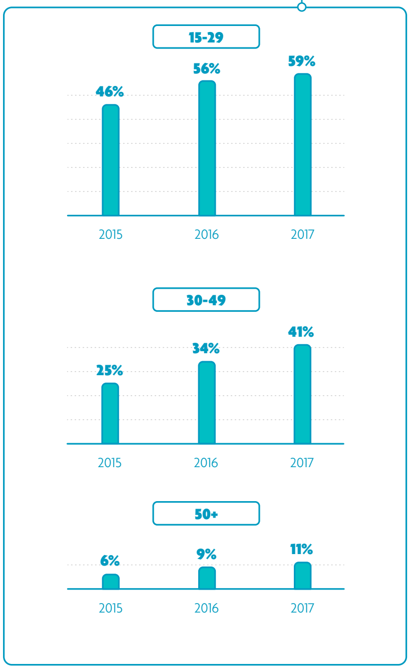


30%
USE AT LEAST 4 SOCIAL NETWORKS PER MONTH

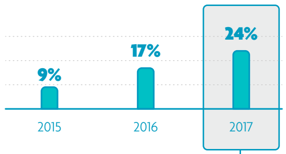
24%
HAVE DELETED AT LEAST 1 ACCOUNT ON SOCIAL MEDIA

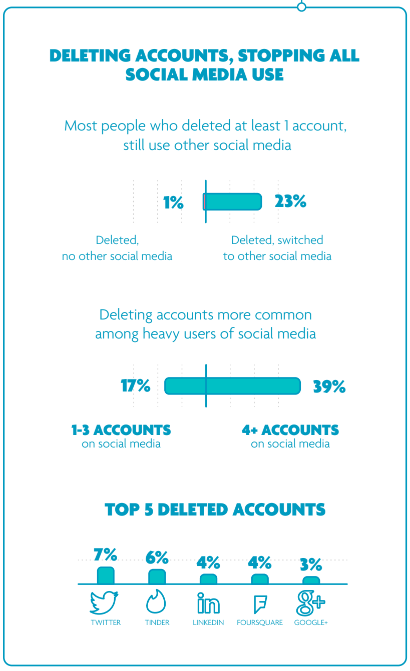
AT LEAST 4 SOCIAL NETWORKS PER MONTH





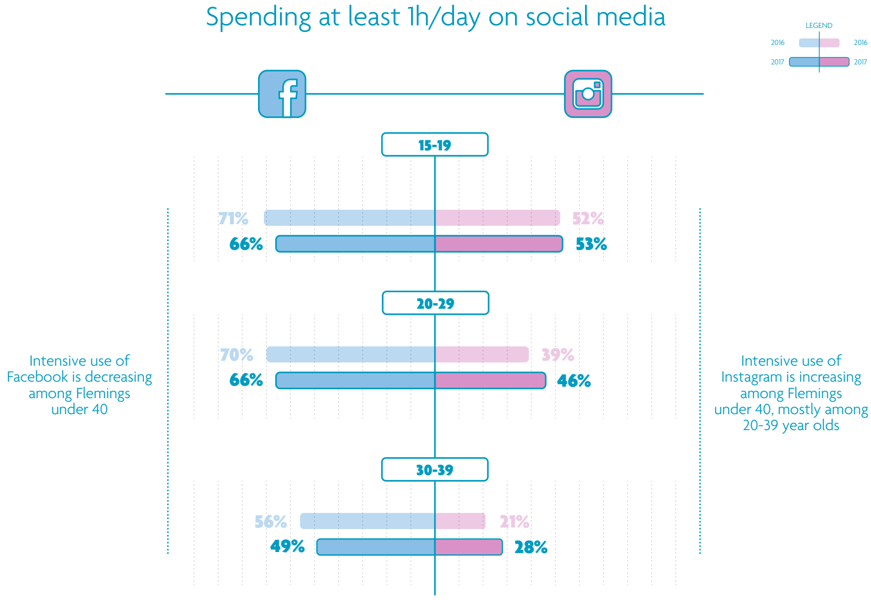
% OF DELETED ACCOUNTS IS INCREASING





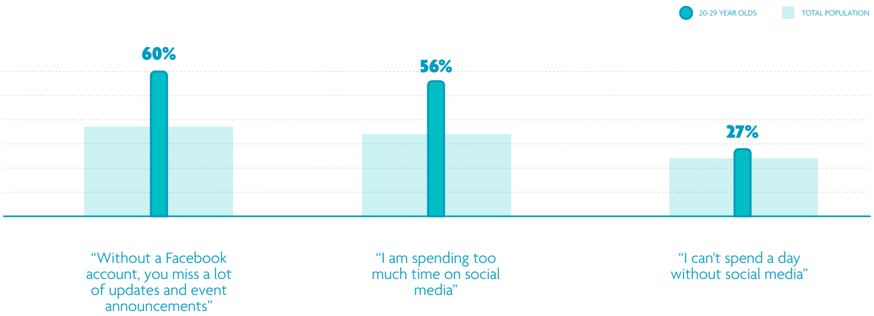
INTENSIVE USE

Spending at least 1h/day on social media



STATEMENTS

Flemings in their twenties seem to be more dependent on social media



SOCIAL MEDIA

ACCOUNT OWNERSHIP

Facebook remains the social network with the most accounts in Flanders. 70,4% of the Flemish population has a personal account (+1,1 percentage points), and 1,7% shares an account with someone else (-0,5 percentage points). Adding the 2,6% of the Flemish population claiming to have deleted their Facebook accounts (-0,6 percentage points), we can conclude that 3 in 4 Flemings have had an account on Facebook at one point in time (74,7%, +0,0 percentage points).

1 in 4 Flemings claim to use YouTube without (consciously) logging into a personal account (25,2%). It must be noted that we can only report the perceptions of the respondents. It is likely that a number of those unregistered users are automatically signed in through their Google accounts. Google+ also has a substantial amount of users claiming to use the network without logging in (6,9%).

The number of Flemings who have ever had an account on Instagram has increased significantly by 4,4 percentage points to 37,4% of the Flemish population. Pinterest (+4,5 percentage points to 31,7%) also experienced significant growth in the number of Flemings who have had an account. On the other hand, Google+ (-6,0 percentage points to 37,4%), Foursquare (-2,9 percentage points to 10,6%) and Swarm (-2,6 percentage points to 9,3%) were associated with a decreased number of Flemings claiming to have ever had an account.

Like last year, Twitter has the highest number of former users who have deleted their accounts (6,8%, +2,1 percentage points), followed by Tinder (6,2%), LinkedIn (4,2%, +0,8 percentage points), and Foursquare (3,9%, +0,9 percentage points). In total, almost 1 in 4 Flemings claims to have deleted an account on at least one of the listed social media (23,7%, + 6,5 percentage points). However, this does not mean that a quarter of Flemings do not use any social network anymore. A large majority of Flemings who have deleted accounts on (at least) one social network still use another (set of) social network(s). Only 0,5% of Flemings have deleted all of their social media accounts and use no social media anymore. The remaining 23,5% have deleted (at least) 1 account, but continue to use other social networks. Moreover, there seems to be a relationship between having deleted (at least) one social media account and using at least four social networks per month. Half of those who have deleted at least one account still use at least four social media sites per month (49,2%). Among those who have never deleted an account, only 24,2% use at least four social network sites per month. In conclusion, it seems that people who have deleted a social media account don't turn their backs on social media in general, but shift their attention to other social media.

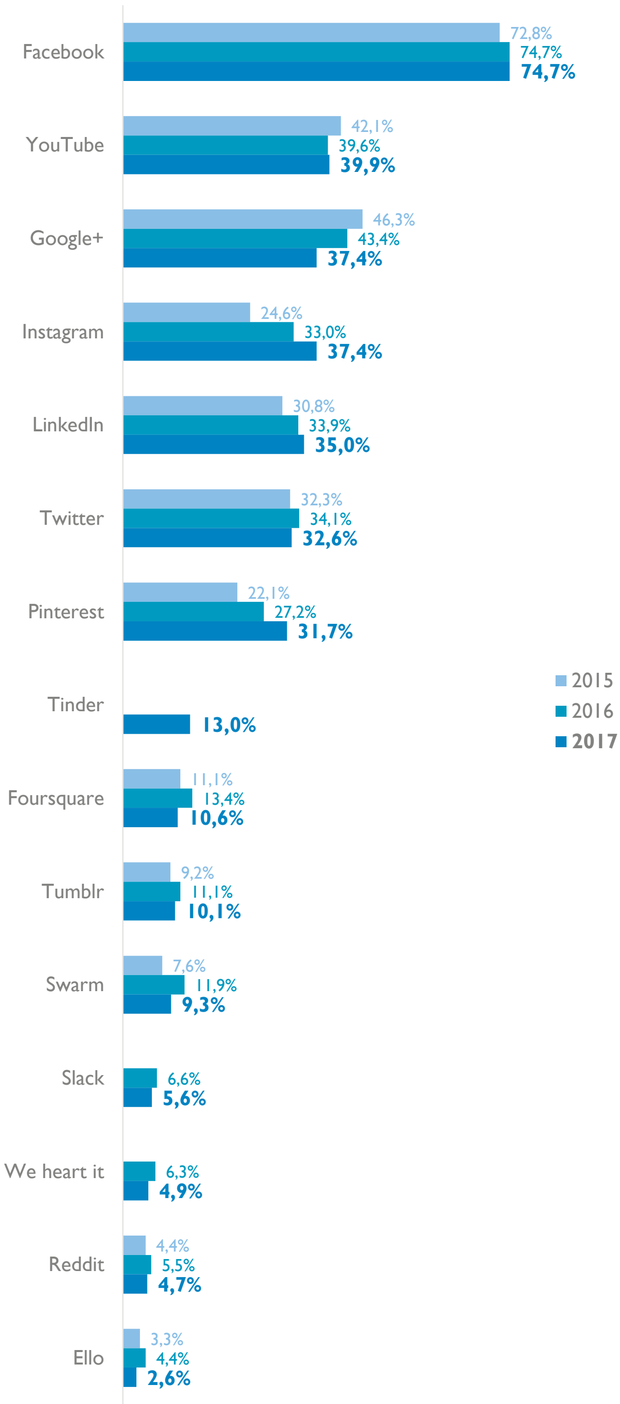
ACCOUNT HOLDERS ON LISTED SOCIAL MEDIA

	Ever had an account	Own/ personal account	Shared account	Deleted account	Use without logging in
Facebook	74,7%	70,4%	1,7%	2,6%	2,1%
YouTube	39,9%	36,9%	1,8%	1,2%	25,2%
Google+**	37,4%	33,3%	1,1%	3,0%	6,9%
Instagram	37,4%	34,4%	0,7%	2,3%	2,9%
LinkedIn	35,0%	30,5%	0,3%	4,2%	1,9%
Twitter	32,6%	24,9%	0,9%	6,8%	2,4%
Pinterest	31,7%	27,9%	0,8%	3,0%	4,3%
Tinder	13,0%	6,6%	0,2%	6,2%	0,4%
Foursquare	10,6%	6,4%	0,3%	3,9%	1,0%
Tumblr	10,1%	7,1%	0,3%	2,7%	2,6%
Swarm	9,3%	6,9%	0,2%	2,2%	0,4%
Slack	5,6%	4,7%	0,2%	0,7%	0,2%
We heart it	4,9%	3,2%	0,1%	1,6%	0,5%
Reddit	4,7%	3,9%	0,3%	0,5%	3,3%
Ello	2,6%	1,5%	0,2%	0,9%	0,3%

Social media table 1: 'Do you have an account with the following social media?' (N=2.345)

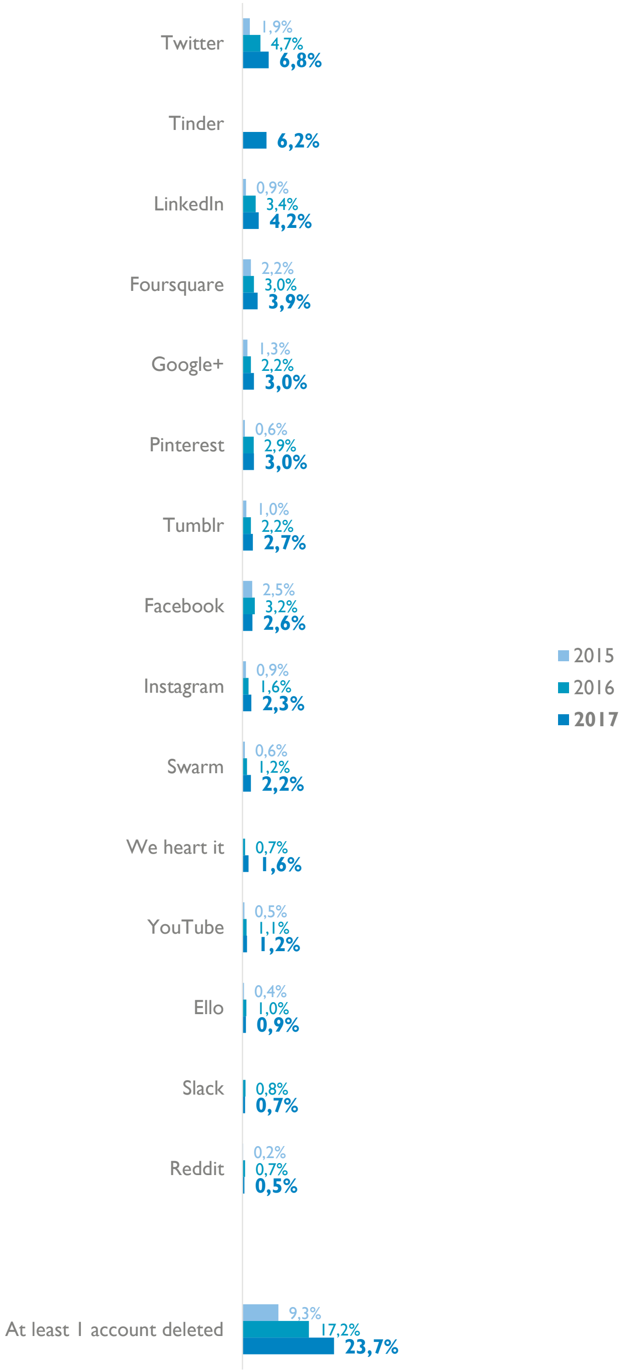
** Despite the effort made in the questionnaire to explain that Google+ is not the same as the popular search engine Google, we cannot rule out that a number of respondents were misled by the well-known name 'Google', and claim to use Google+ while, in fact, they mean that they use Google.

EVER HAD AN ACCOUNT ON SOCIAL MEDIA



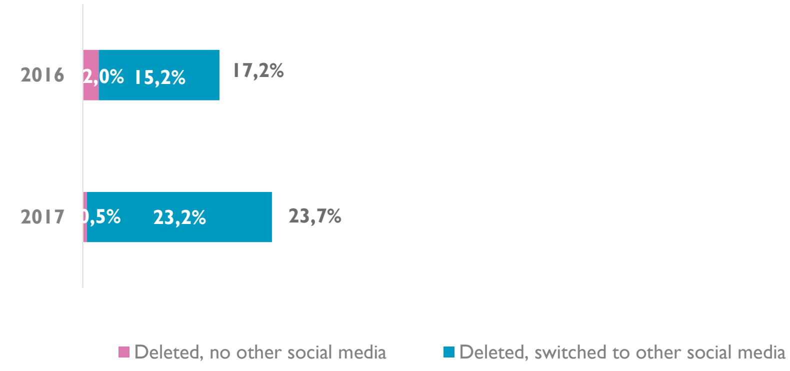
Social media graph 1: 'Ever had an account on the listed social media?' (N=2.345)

SOCIAL MEDIA ACCOUNT DELETED



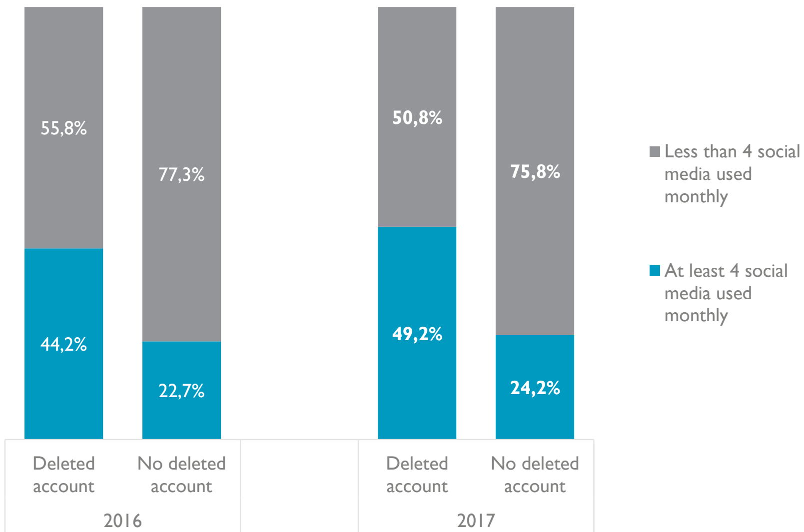
Social media graph 2: At least 1 social media account deleted (N=2.345)

SOCIAL MEDIA ACCOUNT DELETED – SPLIT BY HAVING NO OTHER ACTIVE SOCIAL MEDIA ANYMORE VERSUS SWITCHED TO ANOTHER (SET OF) SOCIAL MEDIA



Social media graph 3: At least 1 social media account deleted – split by having no other active social media anymore versus switched to another (set of) social media (N=2.345)

SOCIAL MEDIA ACCOUNT DELETED IN RELATION TO HAVING AT LEAST 4 ACTIVE SOCIAL MEDIA ACCOUNTS



Social media graph 4: Social media account deleted in relation to having at least 4 active social media accounts (N=2.345)

USE OF SOCIAL MEDIA

MONTHLY USE OF SOCIAL MEDIA

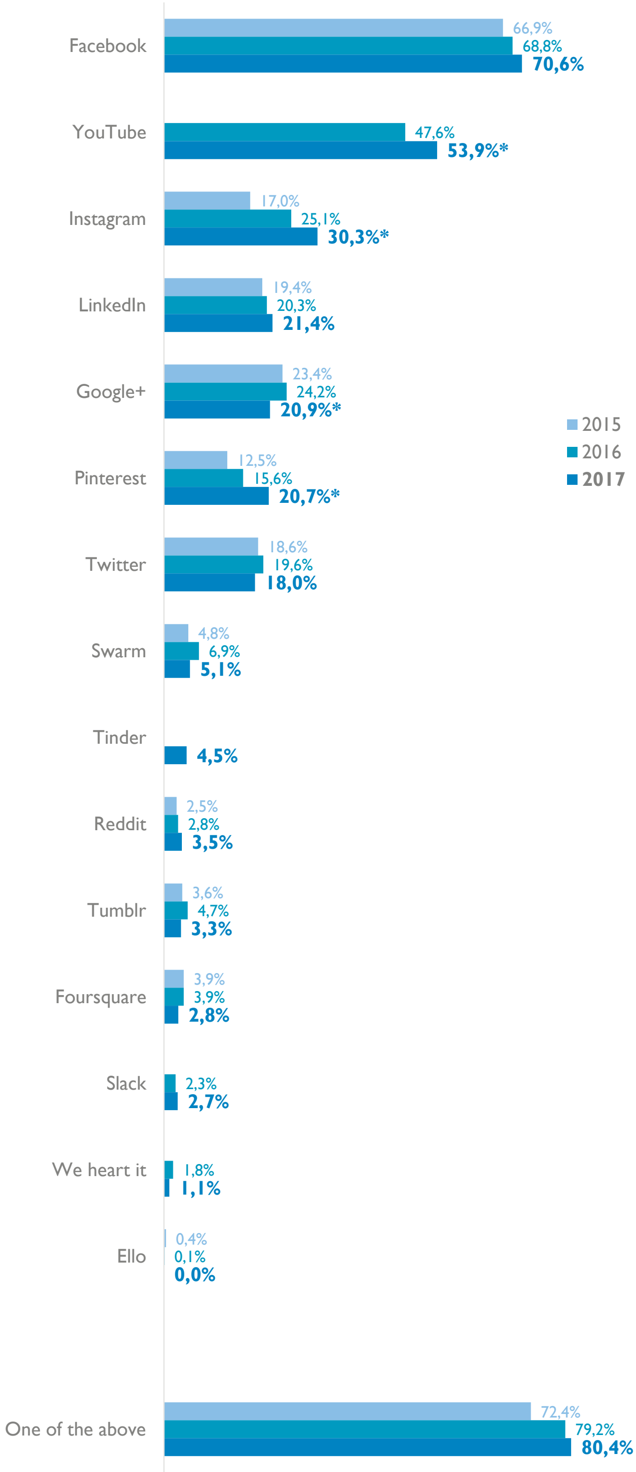
Just as last year, 8 in 10 Flemings have used a social network within the past month (80,4, +1,2 percentage points). Facebook remains the most popular social network in Flanders, with 7 in 10 Flemings having accessed this network in the past month (70,6%, +1,8 percentage points). YouTube remains in second place, with 53,9% of Flemings having used this network at least once per month (+6,3 percentage points).

Next to YouTube, Instagram (+5,2 percentage points) and Pinterest (+5,1 percentage points) are the only other social networks that have experienced significant increases in number of monthly users. Instagram reaches 30,3% of the Flemish population, while Pinterest reaches 20,7%. Google+ experienced a significant drop in active monthly users (-3,3 percentage points to 20,9 percentage points).

Just as in previous years, Facebook is the network with the most monthly users across all age groups of Flemings aged 20 and older. However, for the first time, we see that Facebook is no longer 'king of the hill' among teens. 84,4% of 15-19 year olds use Facebook on a monthly basis, a significant drop of -8,7 percentage points. YouTube has now surpassed Facebook as most popular social network among teens (87,1%). Instagram still mainly attracts users from younger age segments. As a network for professional relationships, it comes as no surprise that LinkedIn is mainly popular within the 20-49 age range.

When comparing the evolution of monthly users of Facebook to the evolution of the Instagram user base, we see that Facebook is only growing among Flemings aged 30+, while the user base of Instagram is growing across all age groups.

MONTHLY USE OF SOCIAL MEDIA



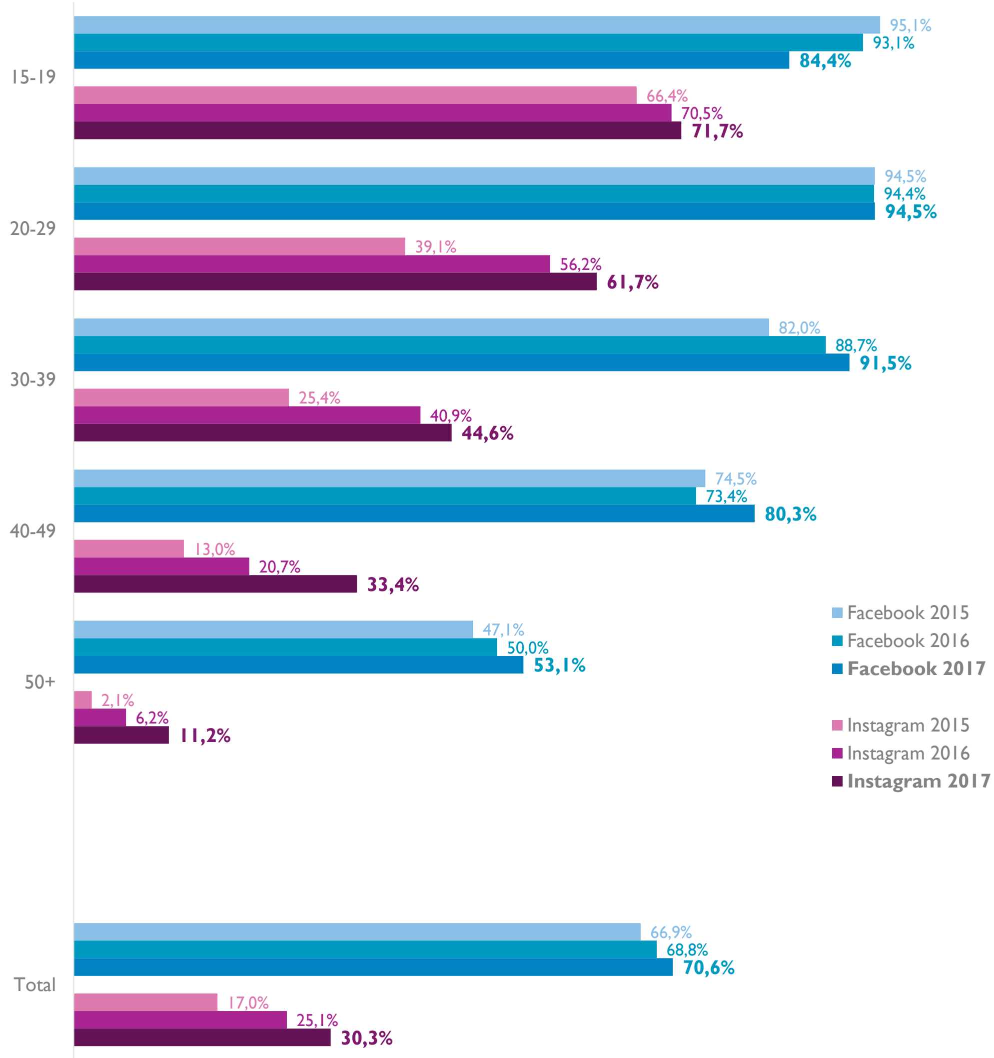
Social media graph 5: 'Which of the listed social media platforms have you used during the past month?' (N=2.345)
* Statistically significant change compared to the previous year, based on a chi-square test.

MONTHLY USE OF SOCIAL MEDIA - SPLIT BY AGE GROUP

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Facebook	84,4%	94,5%	91,5%	80,3%	65,3%	63,1%	41,1%	70,6%
YouTube	87,1%	83,5%	72,3%	59,3%	41,9%	43,4%	26,1%	53,9%
Instagram	71,7%	61,7%	44,6%	33,4%	19,2%	10,8%	5,6%	30,3%
LinkedIn	2,7%	29,9%	33,7%	36,7%	21,0%	16,1%	6,1%	21,4%
Google+	24,8%	23,2%	28,9%	25,2%	19,0%	23,4%	11,7%	20,9%
Pinterest	21,9%	29,8%	32,1%	27,4%	21,1%	9,9%	7,0%	20,7%
Twitter	31,0%	28,5%	24,6%	23,0%	16,6%	7,3%	5,7%	18,0%
Swarm	12,3%	18,3%	5,7%	2,7%	3,2%	0,0%	0,1%	5,1%
Tinder	8,6%	15,0%	8,0%	3,4%	0,9%	0,0%	0,0%	4,5%
Reddit	12,0%	11,4%	5,4%	2,4%	0,2%	0,0%	0,1%	3,5%
Tumblr	15,9%	6,6%	4,1%	2,6%	1,8%	0,3%	0,4%	3,3%
Foursquare	3,3%	8,5%	4,8%	1,6%	2,9%	0,0%	0,0%	2,8%
Slack	0,0%	7,1%	6,8%	3,8%	0,5%	0,6%	0,1%	2,7%
We heart it	10,0%	2,5%	0,1%	0,0%	0,5%	0,0%	0,0%	1,1%
Ello	0,0%	0,0%	0,0%	0,2%	0,0%	0,2%	0,0%	0,0%

Social media table 2: 'Which of the listed social media platforms have you used during the past month?' - split by age group (N=2.345)

FACEBOOK VS. INSTAGRAM - EVOLUTION SPLIT BY AGE GROUP



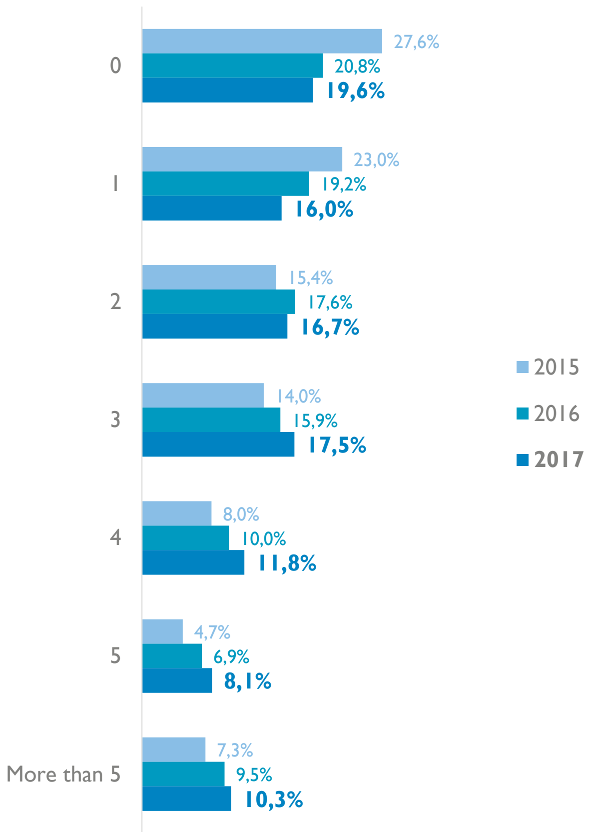
Social media graph 6: Facebook vs. Instagram - evolution split by age group (N=2.345)

NUMBER OF SOCIAL MEDIA USED ON MONTHLY BASIS

Flemings are increasingly using multiple social media on a monthly basis. Whereas the number of Flemings only using one social network has decreased from 23,0% in 2015 and 19,2% in 2016 to 16,0% in 2017, the number of Flemings using at least four social networks on a monthly basis has increased from 20,0% (2015) and 26,4% (2016) to 30,1% (2017).

Over half of 15-29 year old Flemings use at least four social networks per month (54,4%, -3,5 percentage points). The number of 20-29 year olds using at least four social media increased significantly from 55,7% to 61,2%. The largest year-on-year increase is to be found within the 40-49 age range. In that segment, the number of Flemings using at least four social networks increased from 25,6% to 36,1% (+10,5 percentage points).

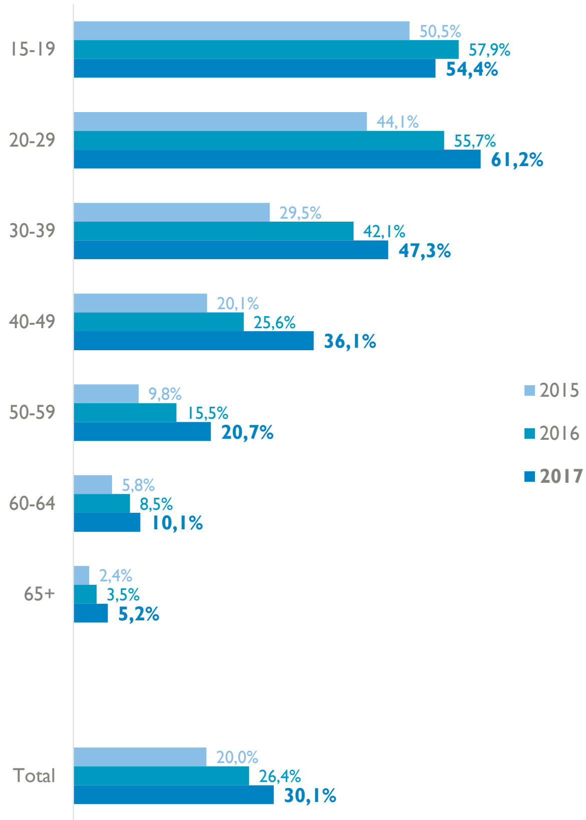
NUMBER OF SOCIAL MEDIA USED DURING THE LAST MONTH



Social media graph 7: 'Which of the listed social media platforms have you used during the past month?' (N=2.345)

* Statistically significant change compared to the previous year, based on a chi-square test.

AT LEAST 4 SOCIAL NETWORKS USED IN PAST MONTH - SPLIT BY AGE GROUP



Social media graph 8: At least 4 social networks selected for question 'Which of the listed social media platforms have you used during the past month?' (N=2.345)

FREQUENCY OF USING SOCIAL MEDIA

Just as in previous years, Facebook has the highest usage frequency. Almost half of Facebook users spend at least one hour per day (47,0%) on the social network. However, this share has decreased compared to 2016 (-2,6 percentage points). 11,3% of Flemish Facebook users claim to spend over three hours a day on the social network.

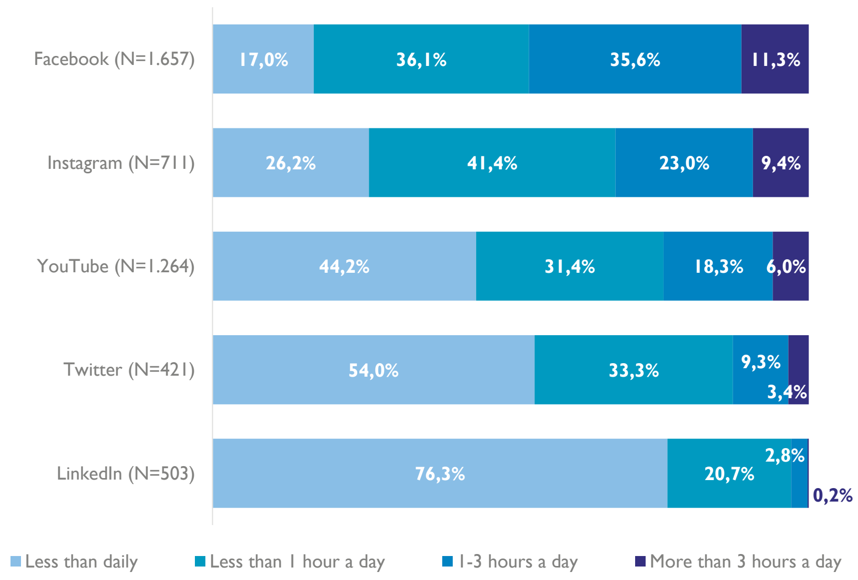
Instagram seems to be the only social network that can measure up to the usage frequency of Facebook. 32,4% of Instagram users use this service for at least one hour every day (+0,3 percentage points). 9,4% of Instagram users spend more than three hours per day using this network.

When we take a closer look at the evolution of Instagram compared to Facebook, we notice that the number of Facebook users that spend at least one hour per day on Facebook is only slightly increasing among Flemings older than 40 (+1,8 percentage points). Within the other age groups, the share of Facebook users spending at least one hour a day on Facebook decreased significantly (15-19: -5,1 percentage points; 20-29: -4,9 percentage points; 30-39: -6,8 percentage points). The share of Instagram users spending at least one hour per day on Instagram is increasing mainly among users aged 20-29 (from 38,7% in 2016 to 46,1% in 2017) and among users aged 30-39 (from 21,2% in 2016 to 27,6% in 2017), and has slightly increased among 15-19 year olds (from 52,0% in 2016 to 53,5% in 2017).

A quarter of YouTube users spend at least an hour a day on the platform (24,4%, -1,2 percentage points), and 6,0% use this social network for at least three hours a day.

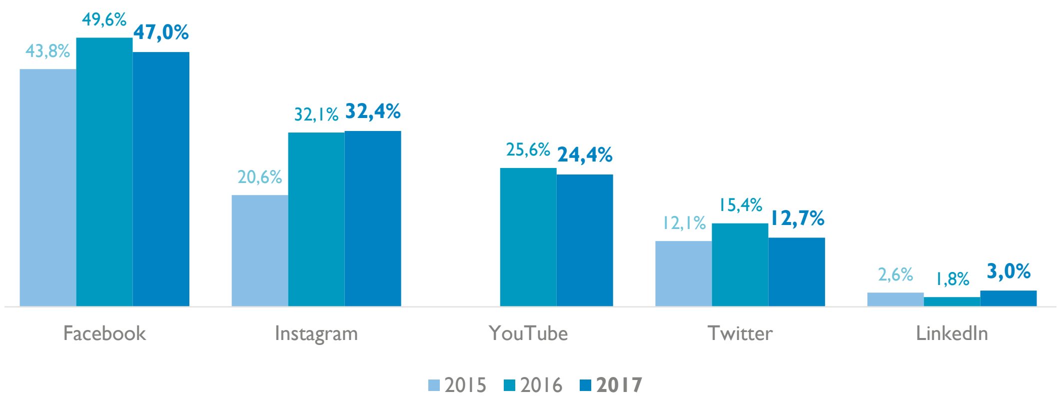
Other social media seem to experience lower usage. 12,7% of Twitter users (-2,7 percentage points) and 3,0% of LinkedIn users (+1,2 percentage points) tend to use the service for at least one hour a day. 3 in 4 of LinkedIn users (76,3%) and over half of Twitter users (54,0%) state using the service less than daily.

FREQUENCY OF SOCIAL MEDIA USE



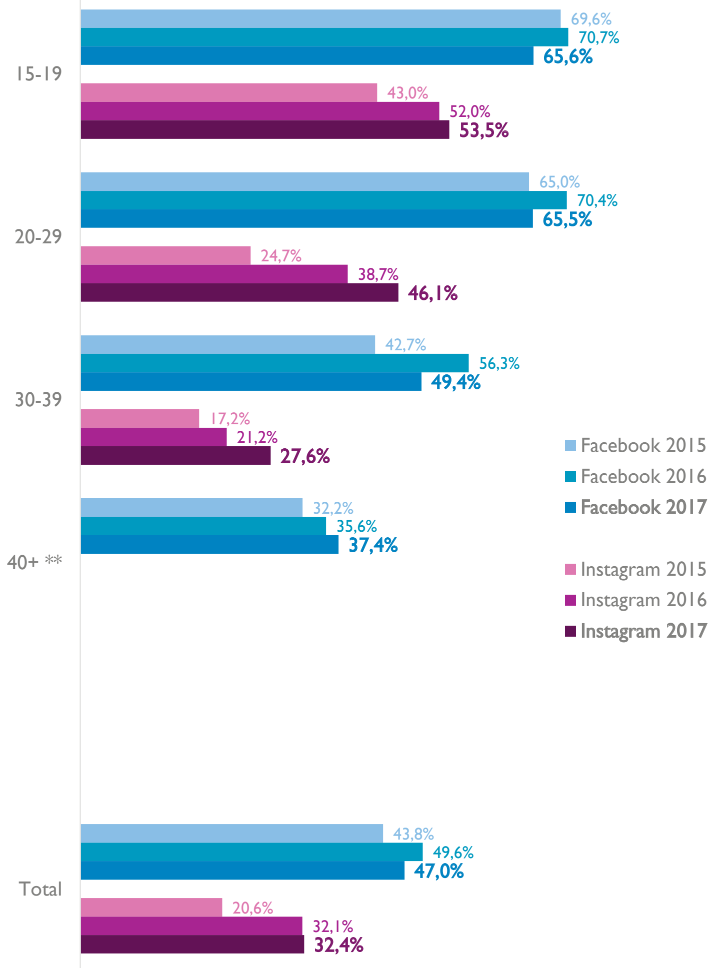
Social media graph 9: 'How often do you use this social network?' (of those who have used that specific social network during the past month)

USING SOCIAL MEDIA FOR AT LEAST 1 HOUR A DAY - EVOLUTION 2015-2017



Social media graph 10: Using social media for at least 1 hour a day - evolution 2015-2017 (of those who have used that specific social network during the past month)

USING FACEBOOK VS. INSTAGRAM FOR AT LEAST 1 HOUR A DAY - EVOLUTION SPLIT BY AGE GROUPS



Social media graph 11: Using Facebook vs. Instagram for at least 1 hour a day - evolution split by age groups (of those who have used the specific social network during the past month).
** Instagram excluded from analysis for age category 40+ due to low sample size (N = 41).

ACTIVITIES ON SOCIAL MEDIA

ACTIVITIES ON FACEBOOK

As was apparent in the previous section, the share of Facebook users claiming to spend at least one hour per day on Facebook has decreased, especially among the younger age segments. This could indicate that Facebook is less intensively used compared to the previous years. This seems to be confirmed when we monitor the frequency of activities on Facebook. Overall, the frequency of activity on Facebook has decreased.

Just as last year, liking someone else's post (36,6%, -5,6 percentage points) and posting a reaction to someone else's post (17,7%, -5,1 percentage points) are the most-performed daily activities on Facebook.

It seems that the strongest decrease in performing activities weekly on Facebook is situated among Flemings aged 20-29. However, when interpreting the activities done on a weekly basis among 15-19 year olds, one should bear in mind that the share of Facebook users has dropped significantly in this segment (84,4% of 15-19 year olds use Facebook at least once per month, a decrease of -8,7 percentage points compared to last year). This could imply that the teens who were the least active on Facebook have left the social network. As such, the share of active Facebook users has gained weight among the network's monthly users. In addition, it is remarkable that among 15-29 year olds, there is a higher preference for sharing content (update, photo, video) in a private Facebook group than on the public Facebook wall. Among Facebook users aged 30+, the public Facebook wall is still a prominent place to share content and updates.

ACTIVITIES ON FACEBOOK

	Ever		Monthly		Daily	
	2016	2017	2016	2017	2016	2017
Liking someone else's post	92,4%	**91,3%**	79,8%	**77,0%**	42,2%	**36,6%**
Posting a reaction to someone else's post	91,1%	**88,0%**	70,8%	**64,4%**	22,8%	**17,7%**
Sharing someone else's post	81,3%	**79,1%**	49,1%	**44,8%**	9,3%	**7,5%**
Posting a status update	81,1%	**77,2%**	37,4%	**34,2%**	7,1%	**6,5%**
Posting content *(text, photo or video)* in a private Facebook group		**77,0%**		**41,7%**		**5,8%**
Publicly posting photos/videos	86,3%	**80,3%**	43,0%	**38,4%**	4,5%	**4,2%**
Sharing a link to a news article	68,2%	**67,3%**	30,3%	**29,7%**	3,5%	**3,5%**
Indicating whether you'll attend an event or not	74,6%	**69,8%**	40,5%	**38,4%**	2,5%	**2,5%**
Announcing an event	64,6%	**59,7%**	21,2%	**17,4%**	1,8%	**1,5%**
Adapting my privacy settings	79,4%	**78,6%**	22,8%	**22,9%**	2,8%	**1,2%**
Defriending someone *(disconnecting from a specific contact)*		**74,9%**		**14,2%**		**1,0%**

Social media table 3: 'How often do you engage in following activities on Facebook?' (of those using Facebook in the past month, N= 1.657)

ACTIVITIES ON FACEBOOK (WEEKLY BASIS) - SPLIT BY AGE GROUP

		15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Liking someone else's post	2016	78,1%	80,2%	76,4%	67,4%	66,8%	63,8%	47,2%	70,1%
	2017	**76,8%**	**77,0%**	**70,5%**	**63,8%**	**63,3%**	**41,2%**	**47,2%**	**64,5%**
Posting a reaction to someone else's post	2016	53,1%	56,7%	57,1%	54,5%	56,3%	43,0%	37,1%	53,0%
	2017	**46,5%**	**49,0%**	**49,4%**	**48,6%**	**43,7%**	**33,9%**	**41,7%**	**45,9%**
Sharing someone else's post	2016	5,5%	17,0%	36,9%	36,0%	37,9%	37,1%	28,8%	29,4%
	2017	**15,0%**	**14,0%**	**27,7%**	**33,6%**	**31,7%**	**18,6%**	**31,0%**	**25,8%**
Posting a status update	2016	6,6%	20,9%	30,7%	26,6%	20,3%	23,6%	17,2%	22,2%
	2017	**9,0%**	**10,2%**	**26,3%**	**24,9%**	**22,9%**	**26,4%**	**29,6%**	**21,7%**
Posting content *(text, photo or video)* in a private Facebook group	2016								
	2017	**24,3%**	**23,5%**	**25,1%**	**18,7%**	**19,4%**	**12,5%**	**19,1%**	**21,0%**
Publicly posting photos/videos	2016	11,0%	19,8%	29,5%	22,2%	16,2%	16,9%	10,3%	19,5%
	2017	**8,9%**	**10,6%**	**24,7%**	**26,5%**	**19,4%**	**13,5%**	**18,8%**	**18,8%**
Indicating whether you'll attend an event or not	2016	38,6%	34,0%	18,6%	13,7%	12,1%	7,5%	3,4%	19,1%
	2017	**29,3%**	**28,8%**	**19,5%**	**13,7%**	**8,6%**	**5,0%**	**5,7%**	**16,2%**
Sharing a link to a news article	2016	10,8%	10,2%	16,4%	22,1%	19,3%	8,3%	12,9%	15,3%
	2017	**9,2%**	**7,4%**	**17,8%**	**18,2%**	**19,5%**	**12,5%**	**13,8%**	**14,7%**
Announcing an event	2016	3,8%	5,9%	5,4%	7,6%	10,8%	3,2%	4,0%	6,4%
	2017	**8,3%**	**4,7%**	**6,7%**	**6,4%**	**3,9%**	**6,2%**	**6,6%**	**5,9%**
Adapting my privacy settings	2016	10,3%	7,8%	6,5%	5,3%	6,3%	4,6%	2,0%	6,2%
	2017	**5,5%**	**4,2%**	**5,9%**	**5,9%**	**2,6%**	**7,7%**	**6,6%**	**5,2%**
Defriending someone *(disconnecting from a specific contact)*	2016								
	2017	**7,8%**	**3,1%**	**2,1%**	**2,6%**	**1,7%**	**3,3%**	**1,9%**	**2,8%**

Social media table 4: 'How often do you engage in following activities on Facebook?' (weekly basis) - split by age group (of those using Facebook in the past month, N= 1.657)

ACTIVITIES ON INSTAGRAM

46,2% of Flemish Instagram users state liking photos on Instagram on a daily basis (+3,0 percentage points). Posting a photo is a daily habit for only 5,6% of Instagram users (-3,1 percentage points). Over 6 in 10 users do, however, claim to post at least one photo per month (65,5%, +4,6 percentage points).

Just as last year, we can still conclude that the youngest age segment is clearly the most productive generation on Instagram: 85,3% of 15-19 year old Instagram users like a photo on a weekly basis, 53,2% react to someone else's photo every week, and almost half send private messages through Instagram at least once a week (46,0%).

However, it seems that teens have implemented an alternative way of using Instagram. In August 2016, Instagram launched Instagram Stories[24], a way of sharing 'moments' throughout the day (through text, photo or video). In contrast to content posted on the profile, Stories are only available for 24 hours (comparable to the Snapchat way of communicating). In that way, users can distinguish between sharing ephemeral updates of what they are experiencing/doing (through Instagram Stories), and displaying a permanent collection of their most beautiful pictures or videos on their profile. It seems that teens have adopted this way of using Instagram, as they seem to less frequently share pictures directly on their profiles (34,0% weekly, a drop of 12,3 percentge points), shifting towards sharing Stories (32,9% weekly).

ACTIVITIES ON INSTAGRAM

	Ever		Monthly		Daily	
	2016	2017	2016	2017	2016	2017
Liking someone else's photo	91,2%	**92,3%**	80,6%	**81,3%**	43,2%	**46,2%**
Reacting to someone else's photo	88,0%	**87,7%**	62,9%	**61,4%**	15,0%	**16,3%**
Posting a photo	85,7%	**86,8%**	60,9%	**65,5%**	8,7%	**5,6%**
Sending a private message	60,8%	**67,6%**	28,5%	**35,7%**	7,7%	**9,3%**
Sharing content via Instagram Stories		**54,6%**		**31,2%**		**8,3%**
Posting a video	59,0%	**64,4%**	21,8%	**23,5%**	2,5%	**2,2%**

Social media table 5: 'How often do you engage in following activities on Instagram?' (of those using Instagram in the past month, N= 711)

ACTIVITIES ON INSTAGRAM (WEEKLY BASIS) - SPLIT BY AGE GROUP

		15-19	20-29	30-39	40-49	50+	Total
Liking someone else's photo	2016	89,1%	76,8%	57,2%	59,8%	52,3%	69,1%
	2017	**85,3%**	**79,9%**	**65,2%**	**68,8%**	**52,7%**	**70,6%**
Reacting to someone else's photo	2016	60,3%	35,5%	36,4%	44,3%	35,9%	41,5%
	2017	**53,2%**	**32,8%**	**39,0%**	**49,8%**	**43,5%**	**42,1%**
Posting a photo	2016	46,3%	32,8%	33,1%	39,8%	27,7%	35,6%
	2017	**34,0%**	**30,6%**	**37,1%**	**36,2%**	**23,9%**	**32,2%**
Sending a private message	2016	30,5%	13,5%	6,6%	16,3%	14,1%	15,5%
	2017	**46,0%**	**30,6%**	**12,8%**	**17,9%**	**17,0%**	**24,3%**
Sharing content via Instagram Stories	2016						
	2017	**32,9%**	**26,1%**	**16,7%**	**12,0%**	**14,6%**	**20,5%**
Posting a video	2016	9,3%	7,6%	7,6%	18,4%	12,3%	9,8%
	2017	**11,0%**	**6,3%**	**10,6%**	**9,3%**	**6,9%**	**8,6%**

Social media table 6: 'How often do you engage in following activities on Instagram?' (weekly basis) - split by age group (of those using Instagram during the past month, N= 711)

24 http://blog.instagram.com/post/148348940287/160802-stories

OPINION ON SOCIAL MEDIA

Over half of Flemings do worry about the impact of social media on their privacy (55,1%, +3,7 percentage points). Interestingly, this concern has increased the most among 15-19 year olds (+16,3 percentage points). This could be linked to the observation that teens seem to share less on public parts of social networks, preferring more private and personal ways of sharing updates (e.g. through private Facebook groups or Instagram Stories, see previous sections in this chapter).

'Fomo' ('The Fear Of Missing Out') is not a rare phenomenon when it comes to Facebook. 37,1% of Flemings fear that they would miss important updates and events without a Facebook account (+0,9 percentage points). This seems especially true within the 15-39 year old age range.

Social media can be time-consuming and even addicting. 33,5% of social media users in Flanders think they spend too much time on social media (+3,1 percentage points). Among 15-29 year olds, this is over half of social media users (15-19: 51,9%; 20-29: 56,5%). Remarkably, this conviction has increased by 7,9 percentage points among 15-19 year olds. Over 1 in 5 of social media users in Flanders can't imagine a day without social media (22,7%, +0,2 percentage points). This figure has decreased among 15-39 year olds, while it has increased among Flemish social media users aged 40+ (except for Flemings aged 60-64, where compared to last year, fewer people agree that they can't spend a day without social media).

27,0% of social media users claim that they share more on social media than ever before (-3,3 percentage points). However, 75,5% of social media users state that they are well aware of what they are sharing and with whom (+1,8 percentage points).

Social media can be a gateway through which to 'lure' people to other media. Over 1 in 3 social media users in Flanders agree that they can be triggered to watch a TV program by a message on social media (36,6%, +1,6 percentage points). 15-29 year old Flemings in particular seem to recognize themselves in that statement.

OPINION ON SOCIAL MEDIA

	(Totally) disagree	Neutral	(Totally) agree
I am worried that social media violate my privacy	17,4%	27,5%	55,1%
You miss a lot of updates and event announcements without a Facebook account	38,8%	24,1%	37,1%
I am spending too much time on social media**	38,6%	27,8%	33,5%
I can't spend a day without social media **	58,1%	19,2%	22,7%
I am sharing more now on social media than before **	51,9%	21,1%	27,0%
Messages on social media about TV programs can trigger me to watch that program **	32,0%	31,4%	36,6%
I always consciously reflect on what to share on social media with who **	5,8%	18,7%	75,5%

Social media table 7: 'To what extent do you agree with the following statements?' (on a 5-point scale) (N=2.345, except where indicated otherwise)
** Filtered by those who have visited at least one social network during the past month (N=1.885)

SHARE (TOTALLY) AGREE WITH STATEMENTS – SPLIT BY AGE GROUP

Statement	Year	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
I am worried that social media violate my privacy	2016	28,9%	46,7%	51,0%	52,4%	59,8%	56,8%	52,2%	51,4%
	2017	**45,2%**	**51,4%**	**49,2%**	**52,0%**	**65,0%**	**66,0%**	**54,8%**	**55,1%**
You miss a lot of updates and event announcements without a Facebook account	2016	46,7%	64,0%	54,8%	37,4%	26,6%	21,4%	15,5%	36,2%
	2017	**50,2%**	**60,4%**	**53,3%**	**42,8%**	**31,2%**	**22,2%**	**16,1%**	**37,1%**
I am spending too much time on social media**	2016	44,0%	54,4%	38,8%	23,2%	19,6%	14,0%	10,5%	30,4%
	2017	**51,9%**	**56,5%**	**41,8%**	**32,8%**	**21,0%**	**18,3%**	**12,8%**	**33,5%**
I can't spend a day without social media **	2016	32,9%	30,1%	30,4%	14,9%	16,0%	26,3%	11,9%	22,5%
	2017	**23,6%**	**26,7%**	**26,2%**	**23,6%**	**18,6%**	**16,6%**	**20,5%**	**22,7%**
I am sharing more now on social media than before **	2016	37,1%	28,3%	36,4%	31,7%	29,1%	27,5%	20,7%	30,3%
	2017	**30,6%**	**21,9%**	**33,2%**	**28,9%**	**26,1%**	**17,2%**	**27,2%**	**27,0%**
Messages on social media about TV programs can trigger me to watch that program **	2016	47,6%	49,8%	43,3%	30,3%	24,8%	22,9%	22,3%	35,0%
	2017	**54,5%**	**50,9%**	**44,5%**	**33,4%**	**25,4%**	**29,9%**	**23,0%**	**36,6%**
I always consciously reflect on what to share on social media with who **	2016	73,0%	75,5%	78,7%	73,3%	76,5%	71,2%	62,7%	73,7%
	2017	**67,8%**	**77,4%**	**79,7%**	**76,6%**	**74,8%**	**76,7%**	**71,2%**	**75,5%**

Social media table 8: Share that (totally) agree with the statements (on a 5-point scale) - split by age group (N=2.345, except where indicated otherwise)
** Filtered by those who have visited at least one social network during the past month (N=1.885)

DIGIMETER PROFILES

SOCIAL MEDIA

DISRUPTOR (19,6%)

Disruptors and Media Maniacs are the biggest users of social media. 98% of Disruptors use at least 1 social network on a monthly basis (compared to 100% among Media Maniacs, and 80% in the total population). Facebook (89%; total population: 71%), YouTube (74%; total population: 54%) and Instagram (44%; total population: 30%) are the most popular social networks for this segment. 45% of the Disruptors use at least 4 social networks per month, which is well above the average in the total population (30%), but well below the average among Media Maniacs (71%).

One of the reasons for their intensive use of social media is that they fear missing events and updates without social media (46%, compared to 37% in the total population). 45% agree that they spend too much time on social media (total population: 34%). This does not mean that they are more occupied by online privacy compared to other segments. 52% of Disruptors agree to be worried about the impact of social media on online privacy (total population: 55%). 76% claim to reflect thoroughly about what content they share with whom on social media (which is at par with the total population: 76%).

MEDIA MANIAC (19,3%)

Every Media Maniac uses at least 1 social network on a monthly basis. Moreover, 71% claim to be using at least 4 social networks every month, which is by far the highest share among all segments (total population: 30%). Media Maniacs show the highest use rates of every single social network. Facebook (95%; total population: 71%), YouTube (86%; total population: 54%) and Instagram (67%; total population: 30%) are the networks that are most likely used on a monthly basis. As they are the most extensive users, Media Maniacs are also the most likely to have already deleted an account on a social network site (42% have ever deleted an account on any of the listed social networks, compared to 24% in the total population).

Of all segments, Media Maniacs attach the highest importance to social media. They are convinced that they would miss important events and updates without Facebook accounts (61%, compared to 37% in the total population). 54% claim that messages on social media sometimes trigger them to watch a TV program (total population: 37%). However, there is a downside to this story. A substantial portion of Media Maniacs claims to spend too much time on social media (51%, compared to 34% in the total population), while a third can't imagine spending a day without social media (32%; total population: 23%). 52% are worried about the impact of social media on their online privacy, which is at par with Disruptors and somewhat below the total population (55%). 82% always critically reflect on what content they share on social media with whom (total population: 76%).

AUGMENTED TRADITIONALIST (19,5%)

Social media are omnipresent in the lives of Augmented Traditionalists, as 97% use at least one social network per month (total population: 80%). 35% use at least 4 social networks per month (total population: 30%). Facebook (92%; total population: 71%), YouTube (68%; total population: 54%) and Instagram (37%; total population: 30%) are the most likely to be used on a monthly basis. They do attach importance to social media, as 52% are convinced that they would miss important events and updates without Facebook accounts (compared to 37% in the total population). 43% claim that messages on social media sometimes trigger them to watch a TV program (total population: 37%). Moreover, Augmented Traditionalists agree more than other segments that they are more than ever sharing content on social media (36%, compared to 27% in the total population).

A substantial portion of Augmented Traditionalists experience the downside of being intensive users of social media, as 36% state spending too much time on social media (total population: 34%) and 27% can't imagine a day without social media (total population: 23%). Half of Augmented Traditionalists admit to worrying about the impact of social media on their privacy (50%; total population: 55%). On the other hand, however, 82% claim to always critically reflect on what content they share on social media and with whom. This latter figure is well above the average in the total population (76%), and at par with Media Maniacs as the highest score among all segments.

STRUGGLER (22,7%)

Strugglers are not unfamiliar with social media, but nevertheless seem to be anxious about getting too involved with social media. 70% of the Strugglers have used at least one social network within the past month. Although this is a substantial part of the segment, it is well below the average in the total population (80%). Facebook (51%; total population: 71%) and YouTube (30%; total population: 54%) are the only networks to reach a substantial share of Strugglers. Moreover, they don't bother combining different social networks, as only 3% have used at least 4 social media within the past month (compared to 30% in the total population).

Strugglers worry more than other segments about the impact of social media on their online privacy (70%; total population: 55%). However, as they are less extensive users of social media, they experience less dependence on social media. 11% can't imagine a day without social media (total population: 23%), while 9% state to spend too much time on social media (total population: 34%).

RESISTOR (18,9%)

Social media play a less central role in the lives of Resistors compared to other segments. Only 37% have used at least 1 social network during the past month (total population: 80%), most likely Facebook (30%; total population: 71%). It may come as no surprise that this segment worries the least that, without a Facebook account, they would miss important events or updates (13%; total population: 37%). Among the Resistors that use at least 1 social network per month, only 6% claim to spend too much time on social media (total population: 34%).

Social media *(monthly use)*

	At least 1 social network	At least 4 social networks
Disruptor	98%	45%
Media Maniac	100%	71%
Augmented Traditionalist	97%	35%
Struggler	70%	3%
Resistor	37%	2%

Social media *(monthly use)*

	Facebook	Twitter	LinkedIn	YouTube	Google+	Instagram	Pinterest
Disruptor	89%	23%	27%	74%	27%	44%	25%
Media Maniac	95%	42%	44%	86%	37%	67%	39%
Augmented Traditionalist	92%	20%	25%	68%	24%	37%	30%
Struggler	51%	4%	10%	30%	10%	3%	9%
Resistor	30%	2%	2%	15%	9%	5%	2%

Statements (% (totally) agree)

	I am worried that social media violate my privacy	Without a Facebook account you miss a lot of updates and events	Spending too much time on social media *(filtered on who use at least 1 social network per month)*	I can't spend a day without social media *(filtered on who use at least 1 social network per month)*
Disruptor	52%	46%	45%	21%
Media Maniac	52%	61%	51%	32%
Augmented Traditionalist	50%	52%	36%	27%
Struggler	70%	18%	9%	11%
Resistor	49%	13%	6%	20%

Statements (% (totally) agree)

	I am sharing more now on social media than before *(filtered on who use at least 1 social network per month)*	Messages on social media about TV programs can trigger me to watch that program *(filtered on who use at least 1 social network per month)*	I always consciously reflect on what to share on social media with who *(filtered on who use at least 1 social network per month)*
Disruptor	30%	36%	76%
Media Maniac	33%	54%	82%
Augmented Traditionalist	36%	43%	82%
Struggler	13%	23%	75%
Resistor	15%	12%	57%

CHAPTER 06

MESSAGING & COMMUNICATION

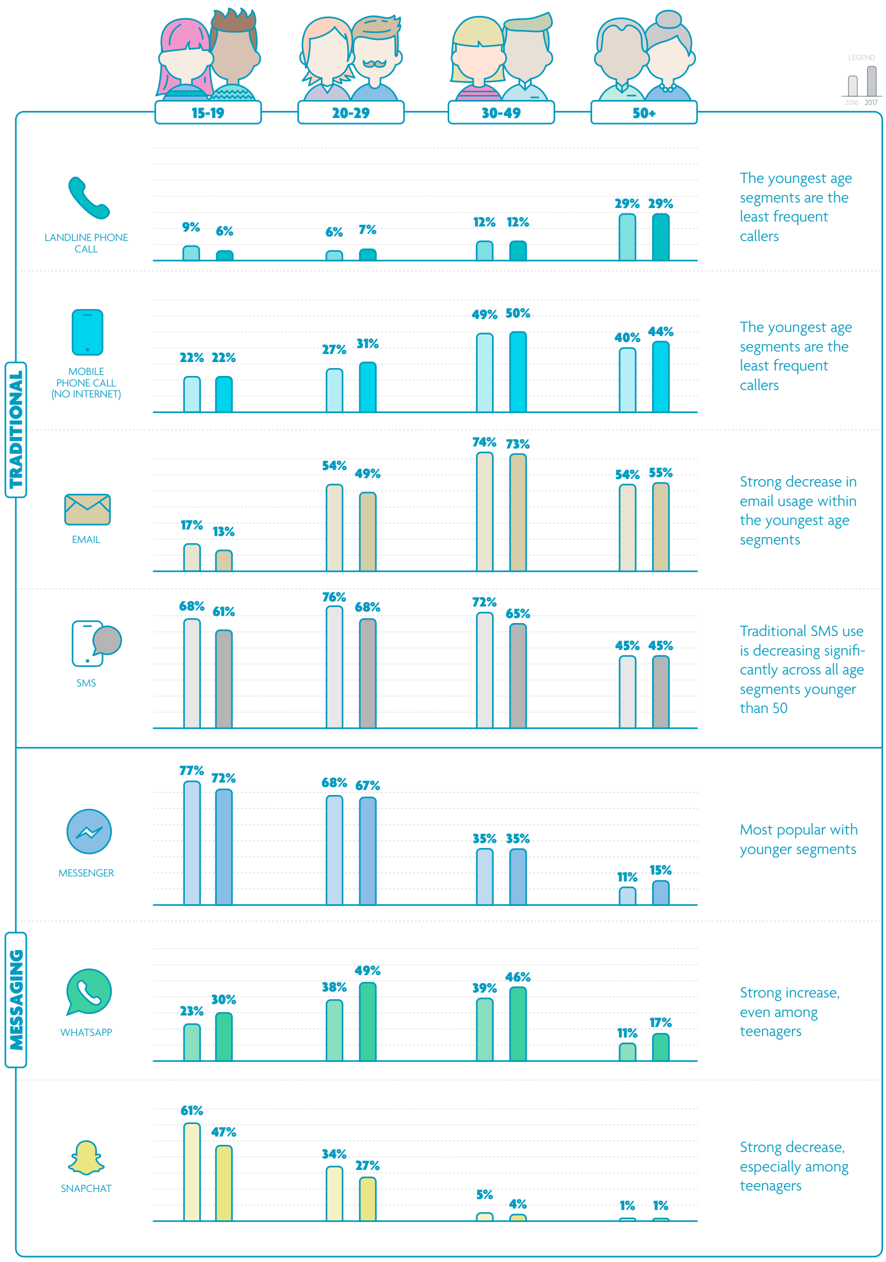
IMEC.DIGIMETER INFOGRAPHIC

COMMUNICATION & MESSAGING

Teens: Snapchat use falls dramatically

TRADITIONAL COMMUNICATION & MESSAGING

Daily use of communication and messaging services



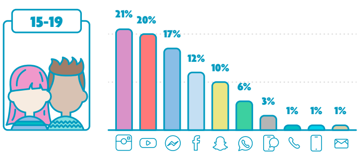
ANIMATED GIF & LIVE VIDEO

Sharing GIFs and live video

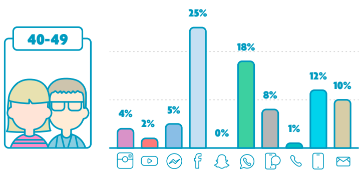
	15-29	30-49	50+	ALL AGES
Animated GIF retrieved from a platform such as Giphy	56%	29%	8%	24%
A self-made animated GIF	22%	13%	4%	10%
A self-made live video	14%	15%	6%	10%

SOCIAL NETWORK OR COMMUNICATION SERVICE

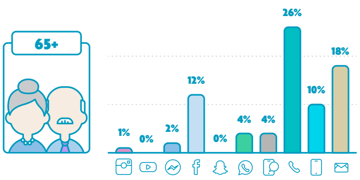
Which one is preferred most?



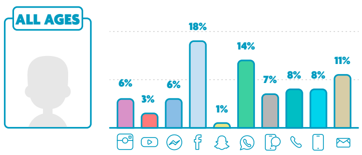
Facebook only ranks 4th for teenagers, after Instagram, YouTube and Facebook Messenger



40-49 year olds have a strong preference for Facebook and Whatsapp, followed by traditional communication



Strong preference for traditional communication, remarkable 3rd place for Facebook



Overall preference for Facebook and WhatsApp, followed by email

MESSAGING & COMMUNICATION

USING COMMUNICATION SERVICES AND APPLICATIONS

Across all age groups of Flemings making phone calls on a daily basis, more use the mobile network (42,5%, +2,6 percentage points) than the landline network (19,0%, +0,2 percentage points). The share of Flemings making mobile phone calls on a daily basis has not changed significantly over the years, except in the case of Flemings aged 60+ and Flemings in their thirties.

Using email as a means of communication is a daily habit for over half of the Flemish population (56,7%, -1,2 percentage points). However, we do see a remarkable difference among age groups. Only 12,6% (-4,2 percentage points) of 15-19 year old Flemings report managing their emails on a daily basis, while among Flemings aged 30-49, some 7 to 8 in 10 claim to use email every day. SMS remains the most popular messaging platform, with 55,5% of Flemings using SMS on a daily basis. The daily use of SMS has, however, decreased by 4,0 percentage points compared to last year. In fact, the daily use of SMS has decreased across all age groups, except among Flemings aged 60+. Just as last year, SMS is not the most-used daily messaging service within the youngest age segment. There seem to be more 15-19 year olds using Facebook Messenger (72,0%) on a daily basis than using SMS (61,4%).

Daily Facebook Messenger use remains relatively stable (31,8%, +0,7 percentage points). Although the service remains the most popular one among 15-19 year olds, we do see a significant drop of 5,1 percentage points compared to last year. WhatsApp, on the other hand, experienced a remarkable boost in daily usage (30,9%, +6,4 percentage points). Even among teens, which was a hard-to-reach audience for WhatsApp in previous years, the daily use of WhatsApp increased by 7,9 percentage points to 30,4%. Arguably the most remarkable outcome in the domain of messaging is the decreased use of Snapchat (8,1%, -3,0 percentage points). The most striking is the drop of 13,4 percentage points among teens, the target audience of the service. Less than half of 15-19 year olds claim to use Snapchat every day (47,4%), whereas this was 60,8% in 2016. A possible explanation is the fact that other communication platforms, especially Instagram, have copied some of the distinctive features of Snapchat. Instagram Stories, for instance, proved to be a popular addition for teens (see Social Media chapter).

Google has trouble finding acceptance in the field of messaging. Google Hangouts seems to further lose ground (1,1% daily use, -0,8 percentage points), while the newer services Google Allo (messaging service) and Google Duo (video call service) have yet to cross the 1% threshold of daily users. What is even more striking is that over 6 in 10 Flemings have never heard of Google Allo (64,0%) or Google Duo (64,2%) a year after the launch of both apps on August 16th, 2016[25].

Platforms such as Viber, Triing, Telegram[26] and Voxer are reaching a niche audience in Flanders, as half of the Flemish population has never heard of those apps. Only a small fraction of the Flemish population has ever used one of those apps (Viber: 4,1%; Triing: 7,3%; Telegram: 2,7% and Voxer: 0,6%).

25 https://www.blog.google/products/allo/allo-duo-apps-messaging-video/

26 Telegram is an online messaging app known as a pioneer in full encryption messaging. This should not be confused with ‘telegram’ as the general term for transmission of written messages by signal, wire or broadcast.

FREQUENCY OF USING COMMUNICATION SERVICES

	Never heard of		Stopped using it		Ever		Monthly		Daily	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Phone call via landline	1,5%	**1,3%**		**10,3%**	73,5%	**70,3%***	52,9%	**52,3%**	18,8%	**19,0%**
Phone call via mobile network *(not via internet)*	1,0%	**1,0%**		**0,4%**	89,5%	**91,6%**	80,2%	**81,5%**	39,9%	**42,5%***
Email	1,0%	**0,7%**		**0,3%**	88,1%	**89,2%**	80,9%	**83,7%***	57,9%	**56,7%**
SMS	0,5%	**0,9%**		**0,2%**	91,2%	**91,9%**	85,2%	**85,2%**	59,5%	**55,5%***
Facebook Messenger	9,6%	**6,3%***		**1,4%**	60,4%	**64,7%***	52,0%	**56,4%***	31,1%	**31,8%**
WhatsApp	12,4%	**8,9%***		**2,4%**	51,5%	**58,8%***	44,4%	**52,8%***	24,5%	**30,9%***
Google Allo		**64,0%**		**1,4%**		**2,4%**		**1,1%**		**0,7%**
Google Duo		**64,2%**		**1,3%**		**2,1%**		**0,8%**		**0,3%**
Google Hangouts	32,8%	**38,0%***		**2,6%**	14,2%	**6,4%***	6,2%	**2,3%***	1,9%	**1,1%**
Snapchat	21,3%	**26,6%***		**4,7%**	25,1%	**19,3%***	19,0%	**14,1%***	11,1%	**8,1%***
Skype	10,6%	**10,8%**		**7,4%**	46,7%	**45,0%**	18,3%	**15,7%***	3,1%	**3,1%**
iMessage	26,4%	**35,8%***		**2,2%**	23,5%	**20,2%***	19,1%	**16,1%***	11,0%	**9,9%**
Facetime	23,4%	**26,4%***		**2,7%**	25,6%	**26,2%**	12,2%	**12,2%**	2,0%	**1,6%**
Viber	39,5%	**49,4%***		**4,6%**	7,0%	**4,1%***	2,8%	**1,8%**	0,9%	**0,8%**
Triing	40,3%	**48,3%***		**3,5%**	9,0%	**7,3%**	4,0%	**3,1%**	0,7%	**0,6%**
Telegram *(online message service)*	43,3%	**51,4%***		**2,1%**	4,2%	**2,7%**	2,4%	**1,7%**	1,0%	**1,0%**
Voxer	49,6%	**60,8%***		**1,2%**	2,7%	**0,6%**	1,4%	**0,4%**	0,3%	**0,2%**

Messaging table 1: 'How often do you use the following communication services and applications?' (N=2.345)

* Statistically significant change compared to the previous year, based on a chi-square test.

DAILY USE OF COMMUNICATION SERVICES - SPLIT BY AGE GROUP

	Phone call via landline		Phone call via mobile network (not via internet)		Email	
	2016	2017	2016	2017	2016	2017
15-19	8,8%	**5,4%**	22,4%	**22,4%**	16,8%	**12,6%**
20-29	5,7%	**7,4%**	26,8%	**30,6%**	53,5%	**49,3%**
30-39	8,1%	**12,3%**	46,1%	**52,1%**	75,2%	**74,9%**
40-49	14,8%	**10,8%**	50,9%	**47,2%**	73,4%	**70,4%**
50-59	15,8%	**15,3%**	56,8%	**53,8%**	65,7%	**64,4%**
60-64	24,7%	**19,0%**	40,6%	**45,1%**	58,9%	**60,2%**
65+	39,7%	**41,1%**	28,2%	**36,5%**	44,0%	**45,6%**
Total	18,8%	**19,0%**	39,9%	**42,5%**	57,9%	**56,7%**

	SMS		Facebook Messenger		WhatsApp	
	2016	2017	2016	2017	2016	2017
15-19	68,2%	**61,4%**	77,1%	**72,0%**	22,5%	**30,4%**
20-29	76,1%	**68,3%**	67,9%	**67,0%**	37,7%	**49,1%**
30-39	69,3%	**64,8%**	43,0%	**41,6%**	51,8%	**56,3%**
40-49	74,7%	**64,6%**	27,3%	**28,7%**	27,3%	**35,8%**
50-59	64,2%	**63,4%**	19,3%	**21,2%**	17,5%	**23,8%**
60-64	45,3%	**47,3%**	11,3%	**14,4%**	14,9%	**20,2%**
65+	30,9%	**32,0%**	5,3%	**11,0%**	5,5%	**11,0%**
Total	59,5%	**55,5%**	31,1%	**31,8%**	24,5%	**30,9%**

	Snapchat		iMessage	
	2016	2017	2016	2017
15-19	60,8%	**47,4%**	18,1%	**16,5%**
20-29	34,2%	**27,3%**	22,5%	**19,3%**
30-39	6,7%	**6,2%**	21,0%	**16,2%**
40-49	2,6%	**1,2%**	13,9%	**10,9%**
50-59	0,7%	**1,0%**	4,1%	**7,3%**
60-64	1,0%	**1,0%**	4,8%	**4,6%**
65+	0,2%	**0,0%**	0,7%	**2,0%**
Total	11,1%	**8,1%**	11,0%	**9,9%**

Messaging table 2: 'How often do you use the following communication services and applications?' (% daily use) - split by age group (N=2.345)

SHARING ANIMATED GIFS AND LIVE VIDEO

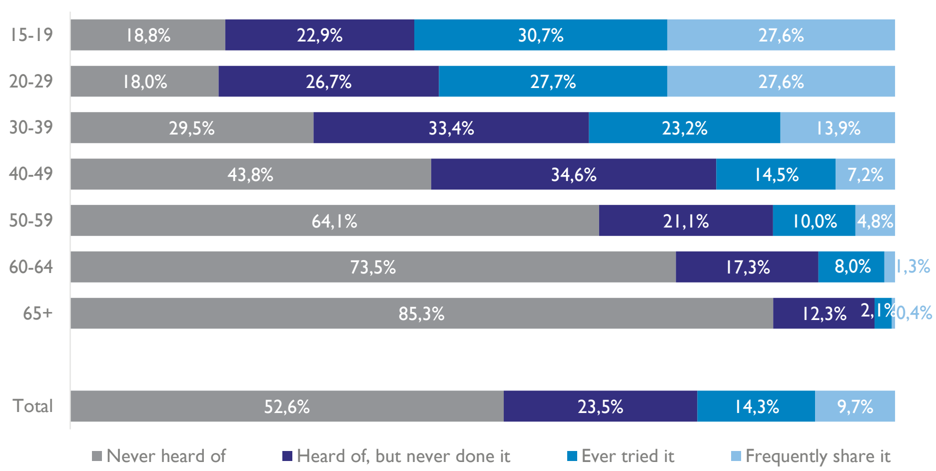
Sharing content on social media or messaging services is not limited to posting textual updates or sharing images or videos. More creative content formats such as animated GIF[27] and live video[28] have emerged and have become easily accesible to all users. However, the awareness and use of these content formats are still highly related to age.

Half of the Flemish population has never heard of animated GIFs (52,6%); among 65+, this is 85,3%. 15-29 year old Flemings are the most active users of animated GIFs retrieved from platforms such as Giphy; over half of them have at least tried it, and 27,6% claim to share GIFs frequently.

Users can also make their own GIFs. This can be done using photo editing software such as Photoshop, or dedicated apps such as Gif.me, Instagram Boomerang or Giphy Cam. 56,8% of Flemings are not aware of this possibility. Only 10,3% of Flemings have ever shared a self-made animated GIF. Among 15-29 year olds, over 1 in 5 have shared a self-made animated GIF (15-19 year olds: 22,1%; 20-29 year olds: 21,3%). But even in this age segment, sharing self-made GIFs is not a common practice, as less than 5% claim to share self-made GIFs on a frequent basis (15-19: 3,7%; 20-29: 3,5%).

Meerkat and Periscope were arguably the pioneers in making self-made live videos easy to create and to share, but Facebook Live made the feature more widespread. In Flanders, 45,3% have never heard of streaming self-made live video, and almost the same amount are aware of it, but have never tried it themselves (44,4%). As with animated GIFs, there is a clear relation with age. More than other age groups, Flemings in their thirties state that they have shared a live video at least once (17,8%); 5,8% state to frequently do so. Among Flemings aged 65+, 78,8% have never heard of sharing live video, and merely 1,6% have ever tried it themselves.

SHARING ANIMATED GIF RETRIEVED FROM A PLATFORM SUCH AS GIPHY - SPLIT BY AGE GROUP

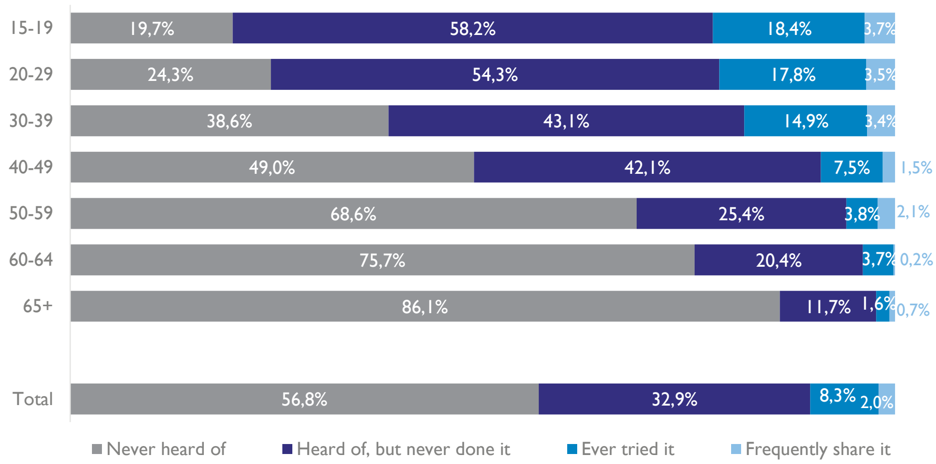


Messaging graph 1: 'How familiar are you with sharing the listed content formats through social media or messaging services?' – animated GIF retrieved from a platform such as Giphy, split by age group (N=2.345)

27 Animated GIFs consist of a string of images combined in one image file (with extension '.gif'), giving the impression of a short, soundless video played in a loop. Animated GIFs can be retrieved from platforms such as Giphy.com, and social media platforms such as Facebook and messaging services such as WhatsApp provide plugins to easily retrieve and share animated GIFs. Editing software such as Photoshop or dedicated apps such as GIF.me, Instagram Boomerang or Giphy Cam allow users to make their own animated GIFs.

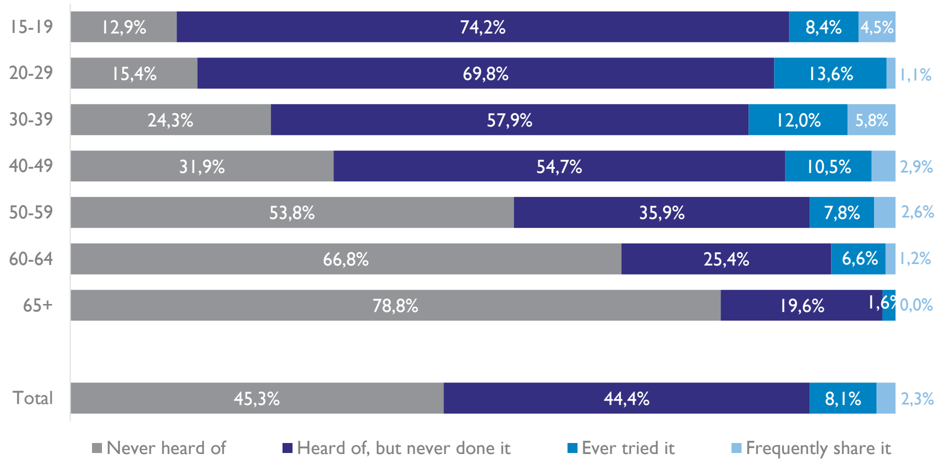
28 A live video is a video shared directly as it is filmed. In that way, viewers are 'live witnesses' of the action. Some services allow for replay after the video was broadcasted, while other services only allow users to stream live videos. Some examples of live video services are Facebook Live and Periscope.

SHARING A SELF-MADE ANIMATED GIF - SPLIT BY AGE GROUP



Messaging graph 2: 'How familiar are you with sharing the listed content formats through social media or messaging services?' – a self-made animated GIF (e.g. using Photoshop or apps like Gif.Me, Instagram Boomerang or Giphy Cam), split by age group (N=2.345)

SHARING A SELF-MADE LIVE VIDEO - SPLIT BY AGE GROUP



Messaging graph 3: 'How familiar are you with sharing the listed content formats through social media or messaging services?' – a self-made live video, split by age group (N=2.345)

FAVORITE SOCIAL NETWORK OR COMMUNICATION SERVICE

Overall, Facebook is chosen by 1 in 5 Flemings as their favorite social network or communication service (18,4%). WhatsApp (13,5%) and email (11,1%) come in second and third place. The top 3 are followed by mobile network phone calls (8,4%) and landline phone calls (8,2%).

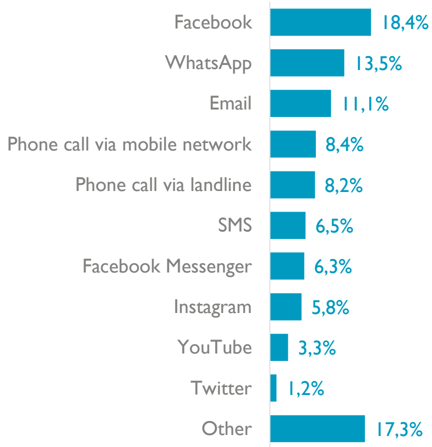
Although Facebook is not the number one service within all age groups, it is the only service that appears in the top 5 of every age group. Among Flemings in their twenties, forties and fifties, Facebook is the favorite service. The 15-19 year-old segment is the only age group in which Facebook does not appear in the top 3.

Email is still an important communication tool, as it appears in the top 5 of all age groups of Flemings aged 30+. Email is even one of the two most-preferred tools among Flemings aged 50+.

Among teens, Instagram (20,5%) and YouTube (20,4%) are the favorite networks, followed by Facebook Messenger (17,2%). Although Facebook itself only appears in fourth place (12,1%), the Facebook group is well-represented in the preferred communication flow of teens, as two of the top three services belong to the Facebook empire (Instagram and Facebook Messenger). Among Flemings in their thirties and forties, the dominance of the Facebook group is even more apparent, as the top 3 services in those segments are Facebook, Instagram and WhatsApp.

Among Flemings aged 65+, landline phone calls (26,2%) and email (17,5%) are the most-used communication services.

FAVORITE SOCIAL NETWORK OR COMMUNICATION SERVICE



Messaging graph 4: 'What is your favorite social network or communication service? In other words, which network or service do you like the most?' (N=2.345)

FAVORITE SOCIAL NETWORK OR COMMUNICATION SERVICE - SPLIT BY AGE GROUP

15-19		20-29	
	2017		2017
Instagram	20,5%	Facebook	21,2%
YouTube	20,4%	Instagram	16,6%
Facebook Messenger	17,2%	WhatsApp	15,4%
Facebook	12,1%	Facebook Messenger	14,0%
Snapchat	10,1%	SMS	6,4%
Other	19,8%	Other	26,5%

30-39		40-49	
	2017		2017
WhatsApp	29,2%	Facebook	25,4%
Facebook	21,4%	WhatsApp	18,3%
Instagram	7,4%	Phone call via mobile network	12,3%
Facebook Messenger	6,8%	Email	10,4%
Email	4,2%	SMS	8,0%
Other	31,0%	Other	25,6%

50-59		60-64	
	2017		2017
Facebook	19,5%	Email	19,9%
Email	16,1%	Facebook	17,1%
WhatsApp	12,8%	Phone call via mobile network	15,1%
SMS	11,1%	SMS	9,1%
Phone call via mobile network	10,0%	WhatsApp	8,8%
Other	30,5%	Other	30,0%

65+		Total	
	2017		2017
Phone call via landline	26,2%	Facebook	18,4%
Email	17,5%	WhatsApp	13,5%
Facebook	11,6%	Email	11,1%
Phone call via mobile network	10,2%	Phone call via mobile network	8,4%
SMS	4,0%	Phone call via landline	8,2%
Other	30,5%	Other	40,4%

Messaging table 3: 'What is your favorite social network or communication service? In other words, which network or service do you like the most?' - split by age group (N=2.345)

OPINION ON MESSAGING

3 in 10 of the Flemish population claim to only use SMS when other messaging apps are not available (e.g., due to lack of internet connection, or because the receiver only uses SMS) (30,7%). This is a remarkable increase compared to last year (+7,2 percentage points). 20-39 year old Flemings in particular seem to agree with this statement (20-29: 41,4%, +8,2 percentage points; 30-39: 48,2%; +11,1 percentage points).

A third of the population can imagine switching completely from SMS to internet-based messaging apps such as Facebook Messenger and WhatsApp (34,8%, +2,0 percentage points). Surprisingly, it is not within the youngest age segment that this belief is most widespread. In fact, it seems that 30-39 year old Flemings particularly agree with this statement (53,0%, compared to 34,8% of the total population, and 31,9% among 15-19 year olds).

When they don't immediately receive a reply, a quarter of Flemings state doing something else on their smartphone while waiting (e.g. checking Facebook, playing a game) instead of putting away their mobile phone (25,1%, +2,3 percentage points). This is a common practice for a substantial part of Flemings younger than 30 (15-19: 42,4%; 20-29: 41,3%).

Web applications like Skype, Facetime, WhatsApp and Facebook Messenger allow users to make video calls. These apps allow users to both hear and see each other through video. Only 15,5% of the Flemish population claims to enjoy video calls more than traditional phone calls (-0,5 percentage points). There are no remarkable differences between age segments concerning this topic. The youngest generation (15-19 years old) seems to agree the most with this statement (23,0%, -1,1 percentage points).

In practice, Snapchat remains a platform for young people. However, only a fifth of Flemings think that Snapchat is only intended for youngsters (19,4%, +2,4 percentage points). An increasing number of Flemings aged 15-39 agree with this statement (15-19: 28,9%, +3,8 percentage points; 20-29: 24,4%, +7,2 percentage points; 30-39: 25,9%, +6,2 percentage points).

OPINION ON MESSAGING

	(Totally) disagree	Neutral	(Totally) agree
I only use SMS when other messaging apps are not available	44,6%	24,7%	30,7%
I can imagine that I won't be using SMS anymore within 5 years	33,3%	31,9%	34,8%
When I don't immediately receive a reply to a message, I'll do something else on my mobile phone while waiting	44,9%	30,0%	25,1%
I enjoy phone calls more when you can see each other through video	45,2%	39,3%	15,5%
Snapchat is only intended for youngsters	27,4%	53,2%	19,4%

Messaging table 4: 'To what extent do you agree with the following statements?' (on a 5-point scale) (N=2.345)

SHARE (TOTALLY) AGREE WITH STATEMENTS – SPLIT BY AGE GROUP

		15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
I only use SMS when other messaging apps are not available	2016	33,5%	33,2%	37,1%	24,3%	19,6%	18,9%	10,0%	23,5%
	2017	**35,8%**	**41,4%**	**48,2%**	**33,1%**	**26,7%**	**22,8%**	**16,8%**	**30,7%**
I can imagine that I won't be using SMS anymore within 5 years	2016	23,9%	38,5%	48,9%	36,8%	26,9%	32,4%	23,1%	32,8%
	2017	**31,9%**	**43,4%**	**53,0%**	**41,9%**	**31,6%**	**30,3%**	**18,7%**	**34,8%**
When I don't immediately receive a reply to a message, I'll do something else on my mobile phone while waiting	2016	46,2%	36,3%	33,1%	22,5%	14,8%	19,0%	8,4%	22,8%
	2017	**42,4%**	**41,3%**	**32,4%**	**21,4%**	**24,2%**	**15,4%**	**13,3%**	**25,1%**
I enjoy phone calls more when you can see each other through video	2016	24,1%	19,5%	15,9%	13,4%	12,2%	12,6%	17,6%	16,0%
	2017	**23,0%**	**17,8%**	**15,5%**	**15,3%**	**13,4%**	**18,1%**	**13,0%**	**15,5%**
Snapchat is only intended for youngsters	2016	25,1%	17,2%	19,7%	20,5%	16,8%	10,9%	12,7%	17,0%
	2017	**28,9%**	**24,4%**	**25,9%**	**18,2%**	**17,8%**	**12,2%**	**14,5%**	**19,4%**

Messaging table 5: Share (totally) agree with the statements (on a 5-point scale) - split by age group (N=2.345)

DIGIMETER PROFILES

MESSAGING & COMMUNICATION

DISRUPTOR (19,6%)

Disruptors show the lowest daily use of landline phone (7%; total population: 19%), and the second lowest daily use rate of mobile phone (35%, compared to 28% among Resistors and 43% in the total population) and email (58%; Resistors: 14%; total population: 57%). The daily use of SMS (56%) is also less common compared to Media Maniacs (75%) and Augmented Traditionalists (64%). Messaging apps such as Facebook Messenger (48%; total population: 32%), WhatsApp (39%; total population: 31%) and Snapchat (13%; total population: 8%), on the other hand, are more popular means of daily communication compared to the total population. When asked to pick out one communication tool they like the most, they most commonly choose Facebook (24%; total population: 20%), WhatsApp (15%; total population: 15%), Instagram (10%; total population: 6%) and Facebook Messenger (10%; total population: 7%).

Together with Media Maniacs, they agree the most to avoiding the use of SMS unless the use of other messaging apps is not possible (43%; total population: 31%). Moreover, 43% agree that within five years, they won't be using SMS at all (total population: 35%). 30% of Disruptors admit that they use other apps (e.g. visiting social media, playing games, etc.) while waiting for a response to a message they have sent instead of putting the smartphone away (total population: 25%).

MEDIA MANIAC (19,3%)

Half of Media Maniacs make mobile phone calls every day (49%; total population: 43%), while only 11% make use of a landline phone on a daily basis (total population: 19%). Managing emails (69%; total population: 57%) and sending SMS messages (75%; total population: 56%) are common daily habits. These more traditional forms of (online/mobile) communication are supplemented with the extensive use of messaging apps. They use Facebook Messenger (60%; total population: 32%), WhatsApp (56%; total population: 31%) and Snapchat (22%; total population: 8%) on a daily basis more than any other segment. When forced to pick out one communication tool they like the most, they most commonly choose Facebook (25%; total population: 20%), WhatsApp (23%; total population: 15%), Instagram (14%; total population: 6%) and Facebook Messenger (11%; total population: 7%).

Although they seem to use messaging apps on top of SMS, 54% think that they won't be using SMS in the future due to the increased usage of messaging apps, which is the highest rate of all segments (total population: 35%). 43% state only using SMS when the use of other messaging apps is not possible (total population: 31%). More than any other segment, Media Maniacs admit that they use other apps (e.g. visiting social media, playing games, etc.) while waiting for a response to a message they have sent instead of putting the smartphone away (41%; total population: 25%).

AUGMENTED TRADITIONALIST (19,5%)

Augmented Traditionalists use a mix of traditional communication tools and messaging apps. 47% make mobile phone calls every day (total population: 43%), while 19% make daily use of a landline phone (total population: 19%). These are supplemented with more classic digital communication tools such as email (66%; total population: 57%) and SMS (64%; total population: 56%). Facebook Messenger (40%; total population: 32%) and WhatsApp (38%; total population: 31%) are commonly used messaging apps. When they have to choose one favorite networking or communication tool, they most likely pick Facebook (27%; total population: 20%), WhatsApp (19%; total population: 10%), email (10%; total population: 12%) and Facebook Messenger (10%; total population: 7%).

42% think that they won't be using SMS in the future due to the increased usage of messaging apps. This being well above the average in the total population (35%), but less pronounced compared to Media Maniacs (54%). 36% state to use SMS only in situations where the use of messaging apps is not possible (total population: 31%). 32% of Augmented Traditionalists admit that they use other apps (e.g. visiting social media, playing games, etc.) while waiting for a response to a message they have sent instead of putting the smartphone away (total population: 25%).

STRUGGLER (22,7%)

Phone calls and email are an important means of communication to Strugglers, more than among any other segment. 29% make daily use of a landline connection to make phone calls (total population: 19%), while 52% make mobile phone calls every day (total population: 43%). Almost 3 in 4 Strugglers claim to manage emails on a daily basis (73%; total population: 57%). This is also reflected in their choices of most preferred communication tools, as email (29%; total population: 12%) and mobile phone calls (17%; total population: 9%) are the most frequently chosen communication tools. 56% state using SMS every day, which is at par with the average in the total population (56%). However, when it comes to using messaging apps, Strugglers score well below average. Only 16% claim to use WhatsApp on a daily basis (total population: 31%), and 9% use Facebook Messenger every day (total population: 32%).

20% of Strugglers claim to only use SMS when other messaging apps are not applicable (total population: 31%). Furthermore, only 27% agree that they could imagine stopping using SMS in favor of messaging apps within the next 5 years (compared to 35% in the total population). 18% of Strugglers admit that they use other apps (e.g. visiting social media, playing games, etc.) while waiting for a response to a message they have sent instead of putting the smartphone away (total population: 25%).

RESISTOR (18,9%)

Resistors rely predominantly on traditional means of communication, and have little experience with digital alternatives. The most common daily communication tools for Resistors are landline phone calls (28%; total population: 19%), mobile phone calls (28%; total population: 43%) and SMS (25%; total population: 56%). Only a few Resistors use WhatsApp (7%; total population: 31%) or Facebook Messenger (6%; total population: 32%) on a daily basis. This leaning towards more traditional communication formats is also apparent in their top choices of most preferred communication tools: landline phone calls (36%; total population: 9%) and mobile phone calls (19%; total population: 9%). As they are less frequent users of messaging apps, they can't imagine that in five years time, messaging apps will have made SMS completely redundant (9%; total population: 35%).

Communication services on a daily basis

	Phone call via landline	Phone call via mobile network	E-mail	SMS
Disruptor	7%	35%	58%	56%
Media Maniac	11%	49%	69%	75%
Augmented Traditionalist	19%	47%	66%	64%
Struggler	29%	52%	73%	56%
Resistor	28%	28%	14%	25%

Communication services on a daily basis

	Facebook Messenger	WhatsApp	Snapchat
Disruptor	48%	39%	13%
Media Maniac	60%	56%	22%
Augmented Traditionalist	40%	38%	6%
Struggler	9%	16%	0%
Resistor	6%	7%	0%

Preferred communication service

	Facebook	WhatsApp	E-mail	Phone call via mobile network	Phone call via landline
Disruptor	24%	15%	7%	5%	0%
Media Maniac	25%	23%	4%	3%	1%
Augmented Traditionalist	27%	19%	10%	4%	4%
Struggler	11%	12%	29%	17%	11%
Resistor	13%	4%	9%	19%	36%

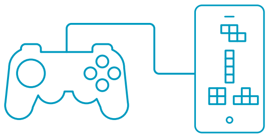
Statements (% (totally) agree)

	I only use SMS when other messaging apps are not available	I can imagine that I won't be using SMS anymore within 5 years	When I don't immediately receive a reply to a message, I'll do something else on my mobile phone while waiting	I enjoy phone calls more when you can see each other through video	Snapchat is only intended for youngsters
Disruptor	43%	43%	30%	18%	22%
Media Maniac	43%	54%	41%	19%	28%
Augmented Traditionalist	36%	42%	32%	17%	18%
Struggler	20%	27%	18%	15%	18%
Resistor	14%	9%	6%	8%	11%

CHAPTER 07

GAMING

IMEC.DIGIMETER INFOGRAPHIC



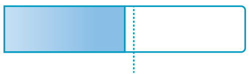
GAMING

Mobile phone remains #1 gaming device

MONTHLY GAMING

Mobile remains #1, but is decreasing

50%
PLAY A GAME ≥ MONTHLY
ON ANY DEVICE



-4%
COMPARED
TO 2016

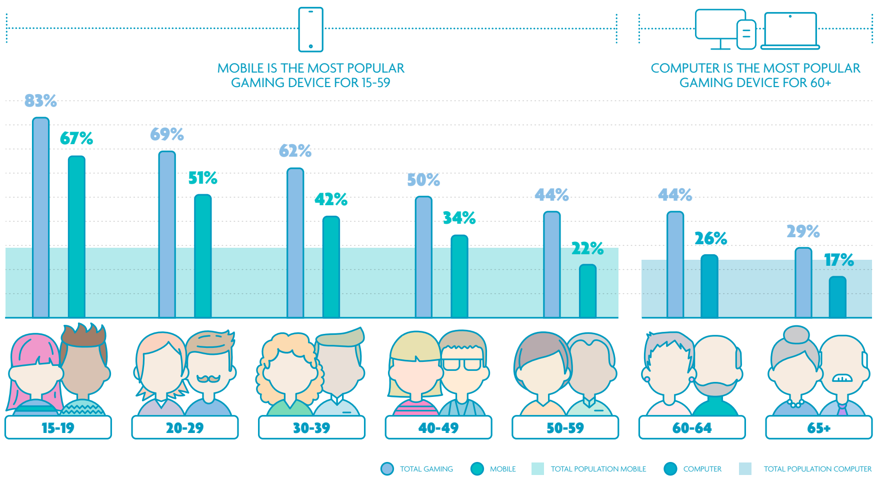
EVOLUTION OF DEVICES USED FOR GAMING

	2013	2014	2015	2016	2017
TOTAL GAMING	61	62	55	54	50
COMPUTER	44	37	31	24	24
MOBILE	29	30	30	33	29
TABLET	24	31	22	20	18
FIXED CONSOLE	21	16	15	11	13
PORTABLE CONSOLE	9	6	4	4	4
HYBRID CONSOLE	—	—	—	—	1

% OF MONTHLY GAMING

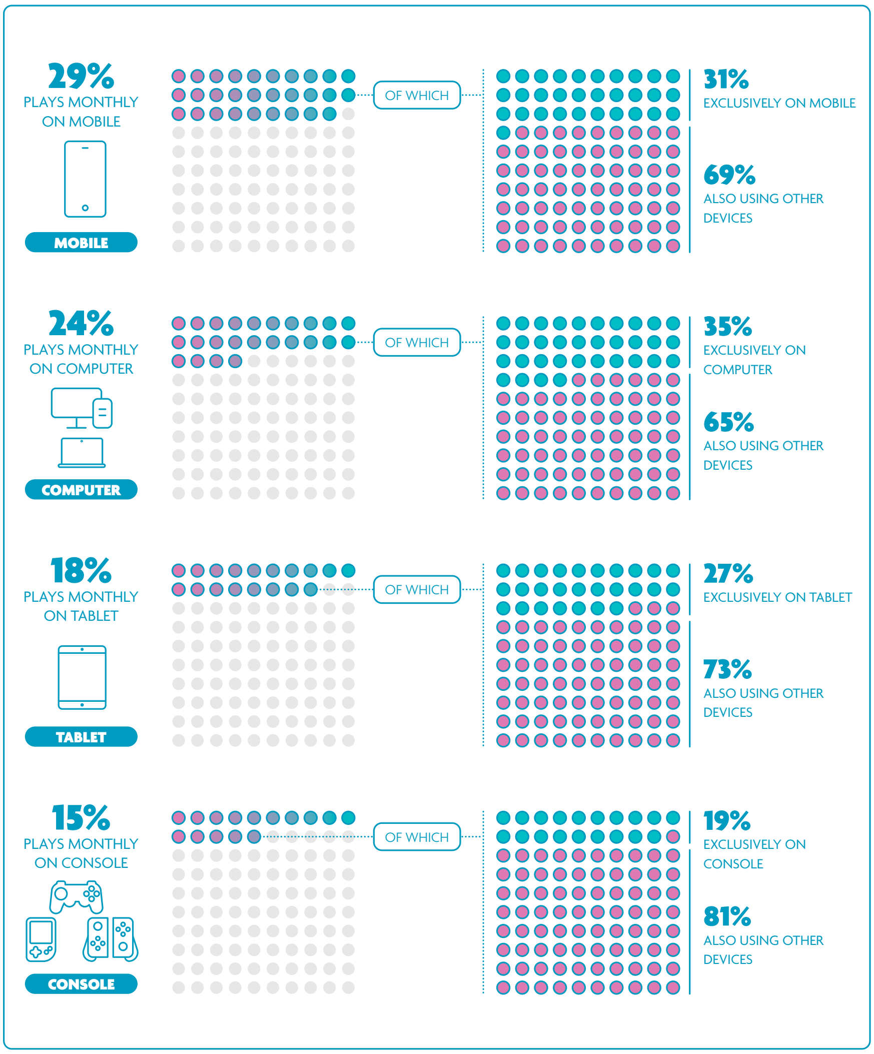
GAMING PER AGE SEGMENT

Popularity of gaming strongly dependent on age



GAMING DEVICES

Exclusive use vs. combined use



GAMING

GAMING DEVICES

DEVICES USED FOR GAMING

Half of the Flemish population reports playing digital games at least once per month on any device (49,7%), which is considerably lower compared to 2016 (-4,2 percentage points). In fact, it seems that in the long term, fewer people report playing games on a monthly basis. In 2014, over 6 in 10 Flemings claimed to game at least once per month (62,4%).

Gaming is still more prevalent among the younger generations. 83,3% of 15-19 year olds indicate having played video games during the past month on any device (+2,3 percentage points). Two age groups display a remarkable decrease in monthly gaming: Flemings in their twenties (68,5%, -7,3 percentage points) and Flemings aged 65+ (28,9%, -8,7 percentage points). Playing video games is still slightly more common among men (55,1%) than among women (44,5%). Moreover, it seems that the divide between male and female gamers has widened compared to last year, as the share of gamers among men remained stable (-1,4 percentage points) while the share of gamers among women dropped by 6,8 percentage points.

Last year we noticed that, for the first time, the mobile phone had overtaken the computer as the most common gaming device. In 2017, this statement is still valid, but the divide has narrowed. 3 in 10 Flemings report playing a game on a mobile phone during the last month (29,1%), which is a significant decrease compared to 2016 (-4,1 percentage points), while gaming on a computer remained stable at about a quarter of the population (23,5%, -0,9 percentage points).

Playing games on a mobile phone is most habitual among 15-19 year old Flemings, as 2 in 3 have played a game on a mobile phone within the past month (66,9%, +1,2 percentage points). The decrease in monthly gaming is mainly situated among Flemings aged 20-59 years old, with the highest decrease among Flemings aged 20-29 years old (50,6%, -9,0 percentage points). The mobile phone is, among both men and women, the most commonly used device for gaming. However, the percentage of people who have played a game on a mobile phone within the past month is higher among men (32,1%, -4,0 percentage points) than among women (26,2%, -4,3 percentage points).

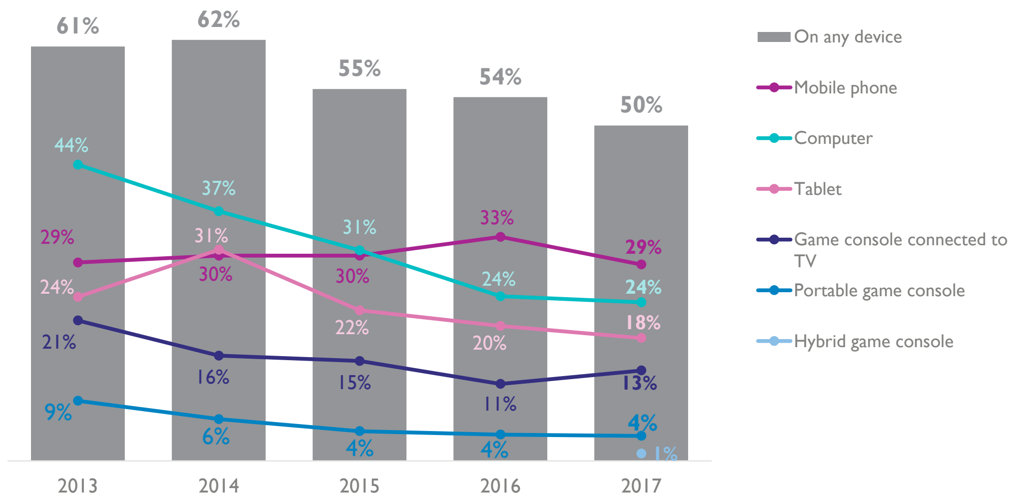
The use of a computer to play games had decreased year by year, but in 2017, this figure seems to have stabilized at about a quarter of the Flemish population (23,5%, -0,9 percentage points). Playing games on a computer is more common among 15-19 year old Flemings, with about 4 in 10 having played a game on a computer during the past month (39,8%, -1,4 percentage points). There is still a distinct difference between men and women on this point. 31,0% of Flemish men have played a game on a computer within the last month (+0,1 percentage points), compared to only 16,4% of Flemish women (-1,7 percentage points).
The tablet is used as a gaming device for slightly fewer than 1 in 5 Flemings (18,2%, -1,8 percentage points). Age and gender are no differentiators in the extent to which playing games on a tablet is a common practice. However, it is remarkable to note that gaming on a tablet seems to have increased among 15-19 year olds by 6,5 percentage points to 25,4%.

Playing games on a game console connected to a TV has increased slightly by 2,0 percentage points compared to last year. 13,4% of Flemings play games on a fixed game console at least once a month, with game consoles mainly popular within the youngest age segments (15-29 years old) and among men.

Gaming on a portable game console remains an activity for a niche audience, as only 3,7% of the Flemish population has played a game on a portable game console (-0,2 percentage points). The youngest age group (15-19 years old) plays games more often on this type of device (12,5%, -3,3 percentage points). The percentage of Flemings that have played a game on a portable game console is about evenly distributed among men (4,0%) and among women (3,4%).

In March 2017, Nintendo launched Nintendo Switch, the first hybrid console. It is 'hybrid' in the sense that you can both connect the console to the screen and use it 'on the go' as a portable game console. Some 6 months after the launch, 1,1% of Flemings claim to game on a monthly basis on such a hybrid console.

DEVICES USED FOR GAMING



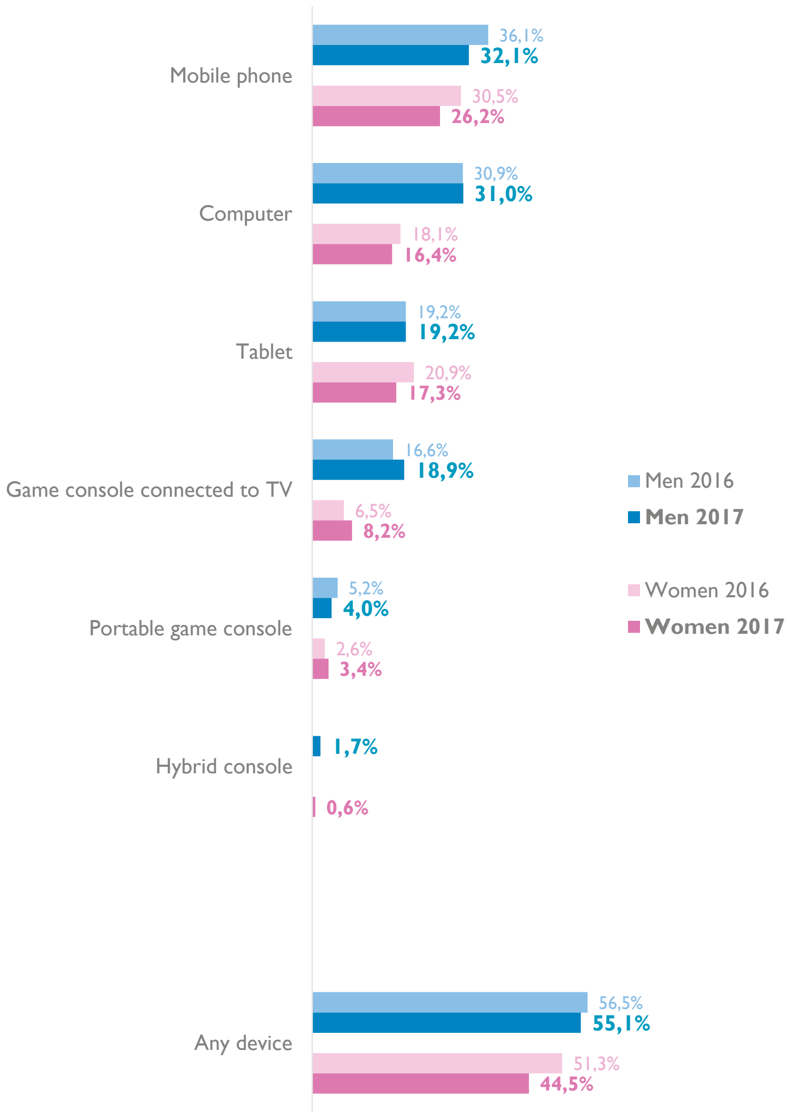
Gaming graph 1: 'On which devices have you played a digital game during the past month?' (N=2.345)

DEVICES USED FOR GAMING - SPLIT BY AGE GROUP

		15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Mobile phone	2016	65,7%	59,6%	49,4%	37,6%	25,6%	12,7%	6,4%	33,2%
	2017	**66,9%**	**50,6%**	**42,3%**	**34,4%**	**21,8%**	**13,5%**	**6,1%**	**29,1%**
Computer	2016	41,2%	38,8%	22,0%	23,1%	17,0%	22,1%	19,2%	24,4%
	2017	**39,8%**	**33,7%**	**25,2%**	**21,1%**	**18,3%**	**26,2%**	**17,0%**	**23,5%**
Tablet	2016	18,9%	22,2%	24,4%	23,0%	20,7%	20,2%	13,7%	20,0%
	2017	**25,4%**	**16,7%**	**20,3%**	**22,6%**	**16,3%**	**19,4%**	**14,1%**	**18,2%**
Game console connected to TV	2016	21,2%	30,9%	17,7%	9,7%	6,4%	1,9%	0,8%	11,4%
	2017	**42,0%**	**27,0%**	**21,6%**	**13,1%**	**4,8%**	**9,0%**	**1,3%**	**13,4%**
Portable game console	2016	15,8%	9,8%	5,7%	1,7%	0,9%	0,0%	0,6%	3,9%
	2017	**12,5%**	**8,4%**	**4,4%**	**2,6%**	**0,9%**	**4,2%**	**0,9%**	**3,7%**
Hybrid game console	2016								
	2017	**2,8%**	**2,2%**	**1,6%**	**1,3%**	**0,4%**	**1,9%**	**0,0%**	**1,1%**
Any device	2016	81,0%	75,8%	64,9%	56,1%	42,0%	38,7%	37,6%	53,9%
	2017	**83,3%**	**68,5%**	**62,0%**	**49,6%**	**44,1%**	**44,2%**	**28,9%**	**49,7%**

Gaming table 1: 'On which devices have you played a digital game during the past month?' - split by age group (N=2.345)

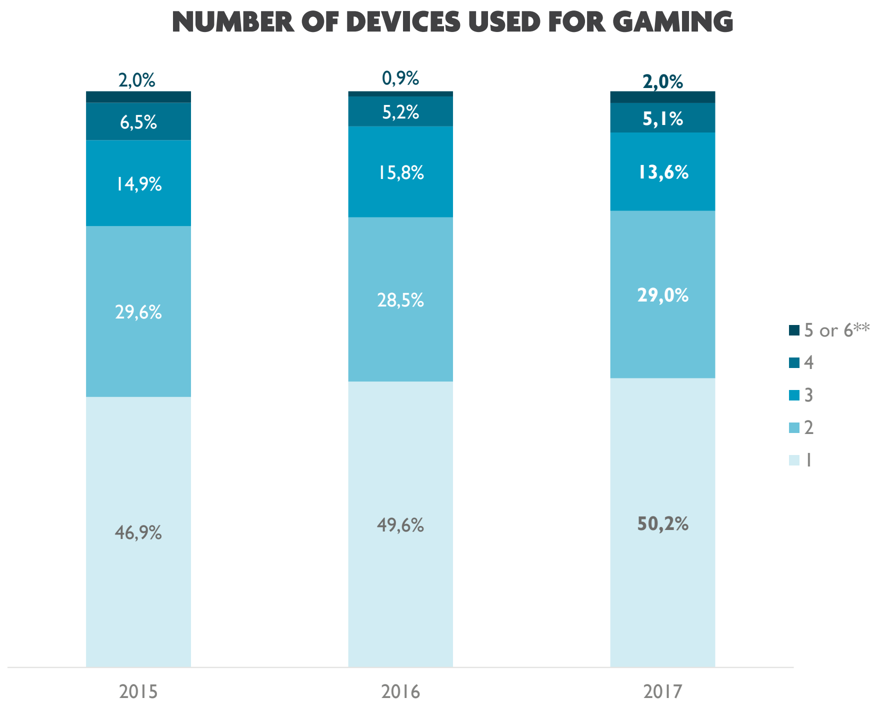
DEVICES USED FOR GAMING - SPLIT BY GENDER



Gaming graph 2: 'On which devices have you played a digital game during the past month?' - split by gender (N=2.345)

NUMBER OF DEVICES USED FOR GAMING

There is no significant shift in the number of different types of devices used for gaming on a monthly basis. Half of Flemish gamers state to have played games on only one device (50,2%, +0,6 percentage points), while 3 in 10 gamers tend to use two types of devices (29,0%, +0,5 percentage points). Some 1 in 5 have played games on at least 3 different types of devices during the past month (20,8%, -1,1 percentage points).



Gaming graph 3: 'On which devices have you played a digital game during the past month?' - count (of those playing games in the past month, N=1.160)
** In 2017, the hybrid game console has been added to the list of game devices, for a sum of 6 instead of 5.

COMBINATIONS OF DEVICES USED FOR GAMING

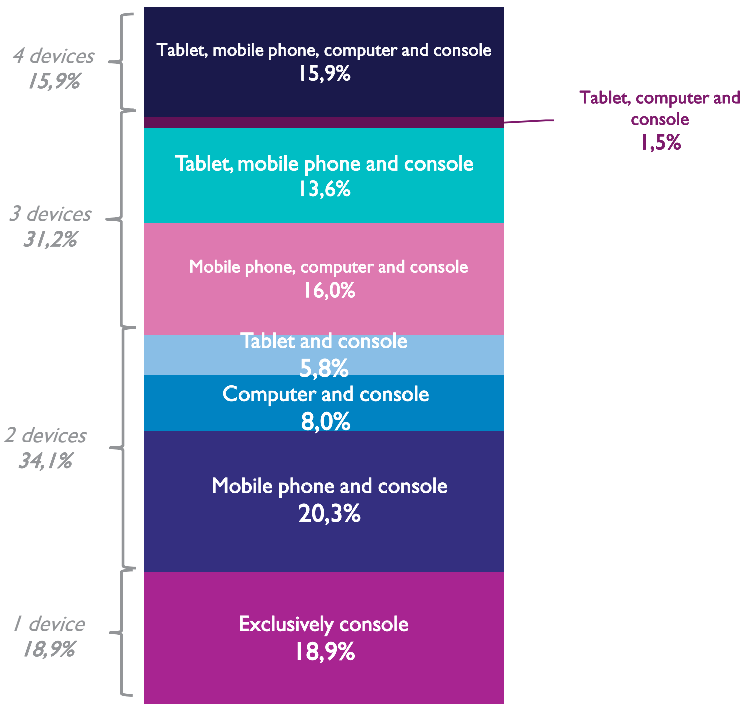
15,2% of Flemings report playing at least once per month on a game console (fixed console, portable console or a hybrid console). Only 1 in 5 of them indicate the game console as their sole gaming device (18,9%). 34,1% of console gamers state that they also game once a month on another device; this is most likely a mobile phone (20,3%). 31,2% of console gamers combine gaming on a console with gaming on two other devices (mainly mobile phone and computer; 16,0%). 1 in 6 console gamers play every month on a mix of console, mobile phone, computer and tablet (15,9%).

23,5% of Flemings play at least once per month on a computer. 1 in 3 of them claim that the computer is the only device they use for gaming that frequently (34,9%). Another 1 in 3 computer gamers state to combine playing on a computer with one other device (33,3%), mainly a mobile phone (18,9%). Over 1 in 5 computer gamers play games on two other devices in addition to the computer (21,6%). 10,2% of computer gamers play every month on computer, tablet, mobile phone and console.

3 in 10 Flemings play games on a mobile phone at least once per month (29,1%). For 31,1% of them, the mobile phone is the only device they use for gaming that frequently. 36,8% combine gaming on a mobile phone with one other device (most likely a computer; 15,2%). A quarter of mobile phone gamers combine two other devices to play games on once a month (23,8%), while 8,3% play games on all of the devices included in the analysis (mobile phone, console, tablet and computer).

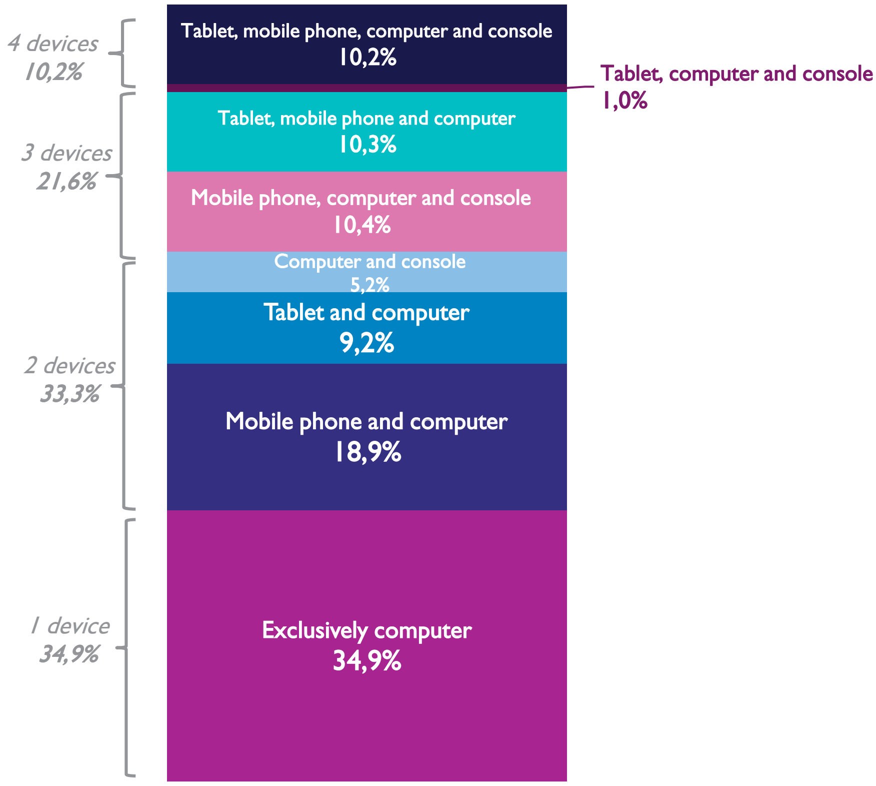
18,2% of Flemings play games on a tablet on a monthly basis. A quarter of them only play games on the tablet (26,5%). A third of tablet gamers also play on another device on a monthly basis (34,5%), in most cases this is a mobile phone (17,7%). 25,9% of tablet gamers play on two other devices, apart from the tablet, at least once per month, while 13,2% play games on all of the listed devices (tablet, computer, mobile phone and console).

CONSOLE GAMING: USED EXCLUSIVELY VS. IN COMBINATION WITH OTHER DEVICES



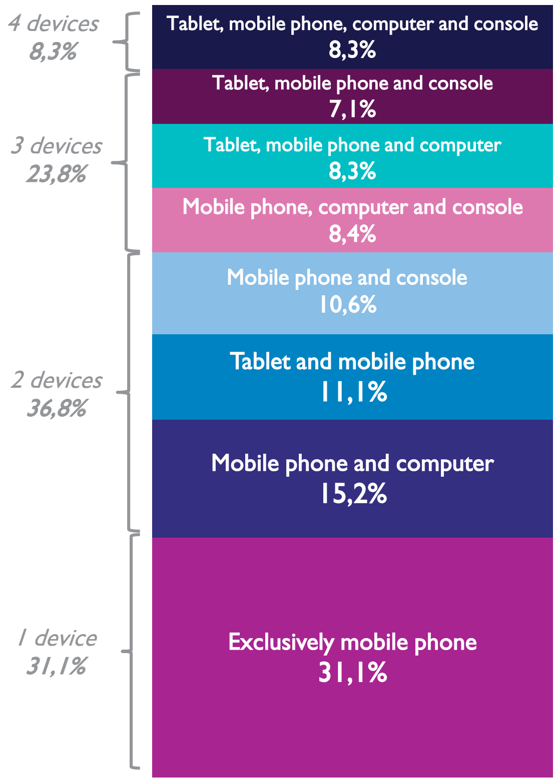
Gaming graph 4: Console gaming: used exclusively on a monthly basis vs. in combination with other devices (of those playing games on a console on a monthly basis, N=356)

COMPUTER GAMING: USED EXCLUSIVELY VS. IN COMBINATION WITH OTHER DEVICES



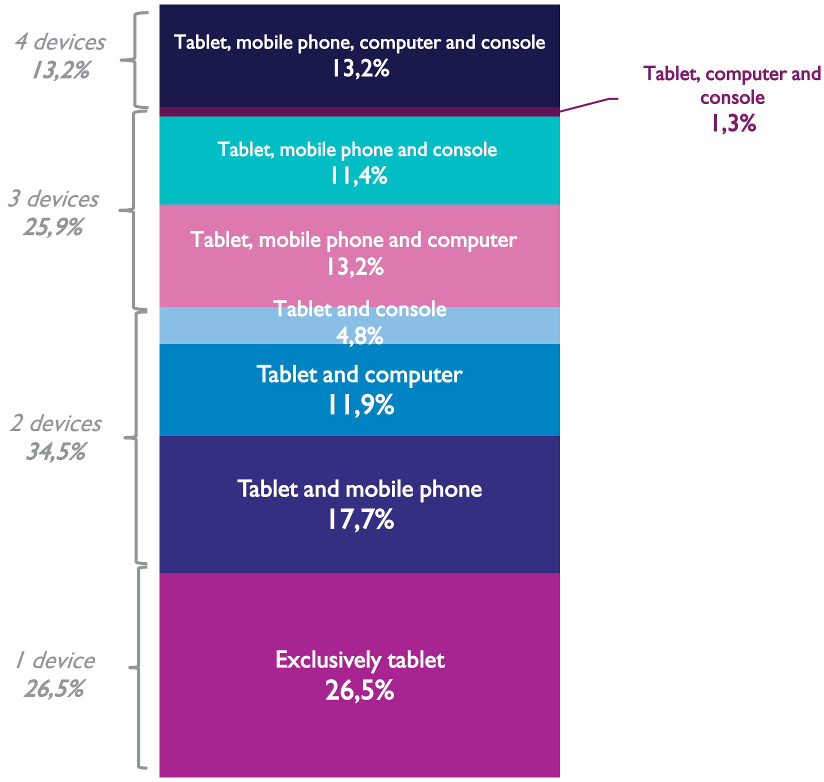
Gaming graph 5: Computer gaming: used exclusively on a monthly basis vs. in combination with other devices (of those playing games on a computer on a monthly basis, N=551)

GAMING ON MOBILE PHONE: USED EXCLUSIVELY VS. IN COMBINATION WITH OTHER DEVICES



Gaming graph 6: Gaming on mobile phone: used exclusively on a monthly basis vs. in combination with other devices (of those playing games on a mobile phone on a monthly basis, N=682)

GAMING ON TABLET: USED EXCLUSIVELY VS. IN COMBINATION WITH OTHER DEVICES



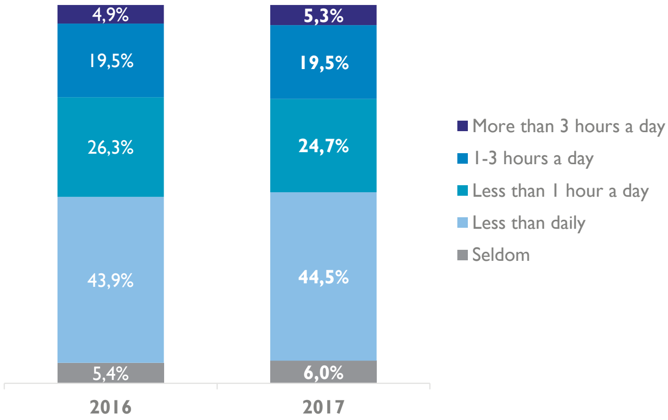
Gaming graph 7: Gaming on tablet: used exclusively on a monthly basis vs. in combination with other devices (of those playing games on a tablet on a monthly basis, N=427)

GAMING FREQUENCY

FREQUENCY OF PLAYING GAMES

Just as last year, half of Flemish gamers report not gaming on a daily basis (6,0% seldom game, and 44,5% game less than daily). A quarter of gamers in Flanders claim to game on a daily basis, but for less than 1 hour per day (24,7%). Another quarter of Flemish gamers can be called 'frequent gamers', as they report gaming for at least 1 hour a day (24,8%, with 19,5% gaming for between 1 and 3 hours a day, and 5,3% gaming for more than 3 hours a day).

FREQUENCY OF PLAYING GAMES



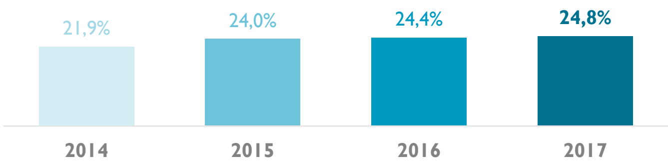
Gaming graph 8: 'How often do you play video games?' (of those playing games in the past month, N=1.160)

FREQUENT GAMERS

The share of 'frequent gamers' (i.e. gamers who game for at least 1 hour a day) remains stable at about a quarter of Flemish gamers (24,8%, +0,4 percentage points). Frequent gamers tend to prefer gaming on a computer (57,7%, compared to 43,9% of less-frequent gamers), a tablet (43,7%, compared to 34,3% among less-frequent gamers), a game console connected to a TV (38,1%, compared to 23,3% of less-frequent gamers) or a portable game console (13,4%, compared to 5,4% of less-frequent gamers). The use of a mobile phone or a hybrid game console seems to not differ significantly between both types of gamers. Note that within the frequent gamers group, the computer (57,7%) and the mobile phone (59,9%) are more or less at the same level as a gaming platform.

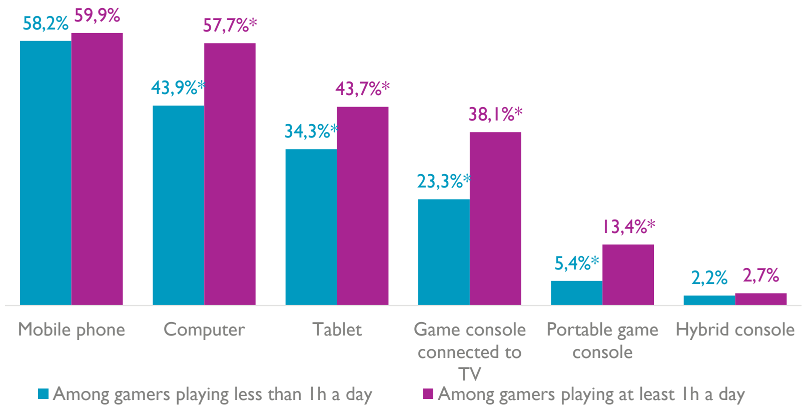
Frequent gamers tend to use a more varied mix of devices to play games on compared to the gamers who play less regularly. Over half of gamers who play for less than 1 hour a day state only using 1 device on a monthly basis to play games on (55,3%). Among frequent gamers, this is only 1 in 3 (35,0%). Moreover, 32,3% of frequent gamers play on at least 3 different types of devices, while this is only true for 16,9% of the gamers who play less frequently.

GAMING AT LEAST 1 HOUR A DAY



Gaming graph 9: 'How often do you play video games?' - % at least 1 hour a day (of those playing games in the past month, N=1.160)

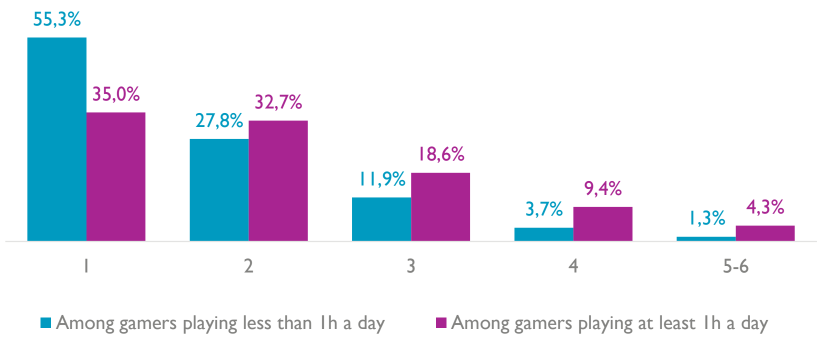
DEVICES USED FOR GAMING - SPLIT BY GAMING FREQUENCY



Gaming graph 10: 'On which devices have you played a digital game during the past month?' - split by gaming less than 1 hour per day vs. gaming at least 1 hour per day (of those playing games in the past month, N=1.160)

* Statistically significant difference between both segments.

NUMBER OF DEVICES USED FOR GAMING - SPLIT BY GAMING FREQUENCY



Gaming graph 11: Count of 'On which devices have you played a digital game during the past month?' - split by gaming less than 1 hour per day vs. gaming at least 1 hour per day (of those playing games in the past month, N=1.160)

DIGIMETER PROFILES

GAMING

DISRUPTOR (19,6%)

Gaming is a popular activity among Disruptors. 61% have played a game on at least one device during the past month (total population: 50%). Most popular devices for gaming are the smartphone (38%; total population: 29%) and the computer (35%; total population: 24%). 22% play at least once a month games on a fixed, portable or hybrid game console (total population: 15%). 16% of Disruptors state to play games for at least one hour every day (total population: 12%).

MEDIA MANIAC (19,3%)

As with all types of media, Media Maniacs are king of the hill when it comes to gaming. Almost 3 in 4 Media Maniacs state to play digital games at least once per month (73%; total population: 50%), which is by far the highest share of all segments. Most common gaming devices on monthly basis are the smartphone (59%; total population: 29%), tablet (35%; total population: 18%), computer (31%; total population: 24%) and game console (30%; total population: 15%). Moreover, 25% of Media Maniacs play games on at least 3 devices on a monthly basis, which is by far the highest share of all segments (total population: 10%). However, this does not mean that Media Maniacs are all excessive gamers, as 16% claim to play at least one hour a day (at par with Disruptors (16%) and Augmented Traditionalists (17%).

AUGMENTED TRADITIONALIST (19,5%)

54% of Augmented Traditionalists play digital games at least once a month (total population: 50%). This is mainly done on a smartphone (33%; total population: 29%), computer (22%; total population: 24%) or a tablet (21%; total population: 18%). 14% of Disruptors play games on a console, which is at par with the average in the total population (15%). Together with Disruptors and Media Maniacs (both 16%), Augmented Traditionalists count the highest share of frequent gamers, gaming at least one hour every day (17%).

STRUGGLER (22,7%)

Strugglers are not the biggest gamers. 38% play digital games at least once per month (total population: 50%), most commonly on a computer (20%; total population: 24%), a tablet (14%; total population: 18%) or smartphone (11%; total population: 29%). 5% of Strugglers play games on a game console on a monthly basis (total population: 15%). 1 in 12 Strugglers state to game at least one hour every day (8%; total population: 12%).

RESISTOR (18,9%)

Only 24% of Resistors claim to play videogames on a monthly basis, which is less than any other segment (total population: 50%). Moreover, the gamers within this segment tend to be more casual players. Only 7% of the Resistors play games at least one hour a day (compared to 12% among gamers within the total Flemish population), and only 6% use at least 2 devices to play games on a monthly basis (total population: 25%). When they do play games, this is mainly done on on a computer (10%; total popultion: 24%), a tablet (8%; total population: 18%) or smartphone (7%; total population: 29%). 6% play games on a game console on a monthly basis (total population: 15%).

Devices used for gaming *(monthly basis)*

	Game console connected to TV	Portable game console	Computer	Mobile phone	Tablet	Any device	Used at least 2 devices
Disruptor	18%	6%	35%	38%	14%	61%	33%
Media Maniac	28%	7%	31%	59%	35%	73%	51%
Augmented Traditionalist	13%	3%	22%	33%	21%	54%	26%
Struggler	5%	1%	20%	11%	14%	38%	9%
Resistor	5%	2%	10%	7%	8%	24%	6%

Time spent on gaming per day

	At least 1 hour a day
Disruptor	16%
Media Maniac	16%
Augmented Traditionalist	17%
Struggler	8%
Resistor	7%

CHAPTER 08

GENERAL MEDIA

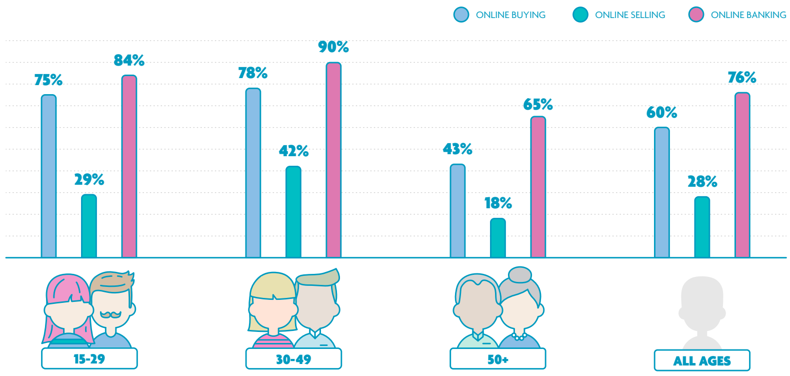
IMEC.DIGIMETER INFOGRAPHIC

GENERAL MEDIA

Perception of digital invasion mainly among youngsters

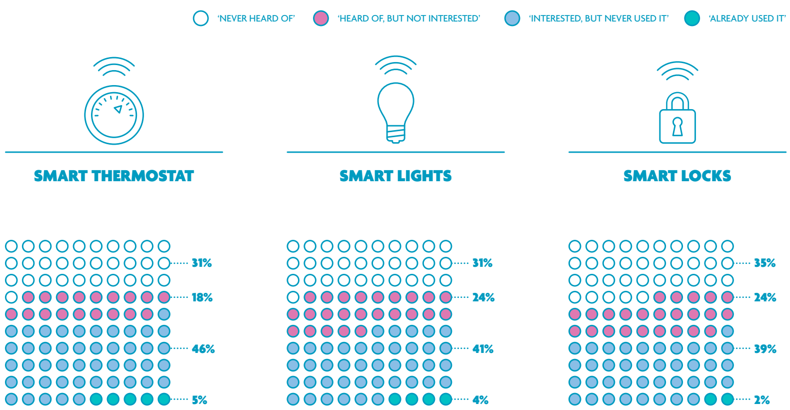
ONLINE TRANSACTIONS & BANKING

Mostly popular among 30-49 year olds



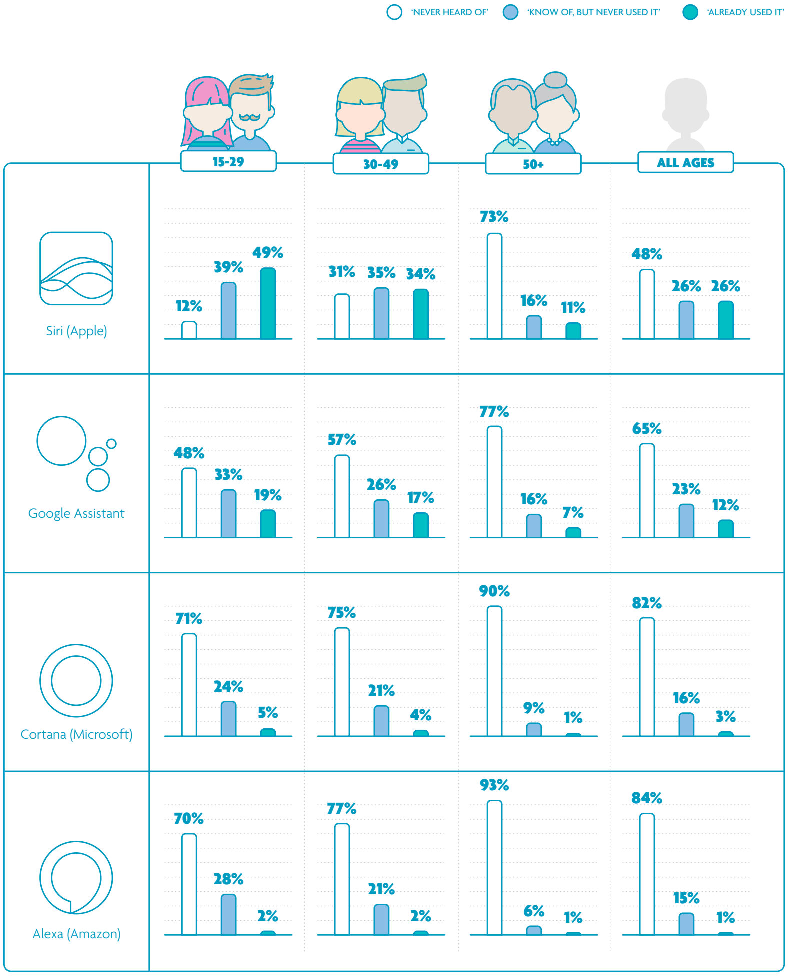
SMART HOME APPLICATIONS

High untapped potential



VOICE CONTROLLED VIRTUAL ASSISTANTS

Siri and Google Assistant most known



PERCEPTION OF DIGITAL INVASION

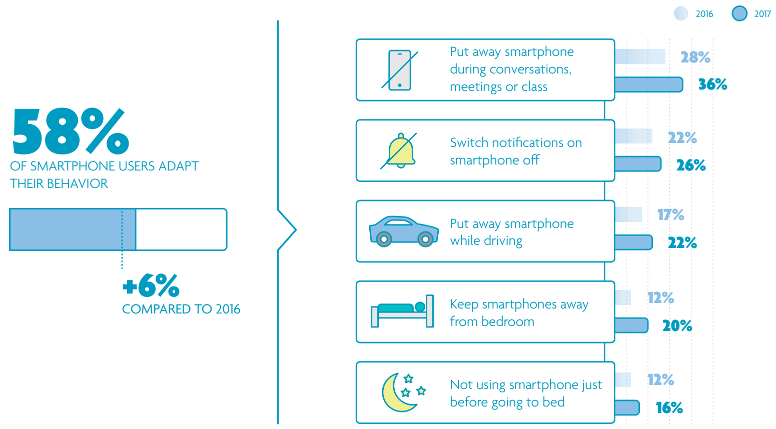
Teenagers perceive less time spent on family due to digital media

	15-19	20-29	30-49	50+	ALL AGES
"I spend less time with my family due to digital applications"	34%	24%	16%	9%	15%
"I have to be in touch with my work even during my vacation due to digital applications"	27%	31%	30%	12%	21%
"I feel my personal life is being invaded by digital applications"	38%	51%	45%	35%	41%

HIGHEST PERCEPTION OF DIGITAL INVASION

ADAPTING SMARTPHONE BEHAVIOR

Growing number of smartphone users try to keep their use under control



STATEMENTS

Perceived anxiety to engage in digital behavior

	15-19	65+
"I have difficulty understanding most technological matters"	9%	43%
"Technological terminology sounds confusing to me"	10%	41%
"I have avoided technology because it is unfamiliar to me"	11%	41%
"I hesitate to use technology for fear of making mistakes I cannot correct"	7%	36%

GENERAL MEDIA

E-COMMERCE AND INTERNET BANKING

2 in 3 Flemings claim to have ever bought items online via a computer (65,0%); 29,3% do so at least once per month. Other devices such as the smartphone or tablet are still less-commonly used for online purchases. 26,0% of Flemings have bought items online by means of a smartphone, and 20,2% via a tablet. In total, 1 in 3 Flemings claim to make online purchases at least once a month (32,3%). Among Flemings in their twenties (43,1%) and in their forties (45,3%) this is over 4 in 10, and among 30-39 year old Flemings, this is more than 50% (55,1%).

Selling items online is a less-common practice for Flemings, but 4 in 10 claim to have sold something on an online platform using a computer (39,1%). Selling items online is a monthly practice on a computer for only 5,6% of the Flemish population. Similarly to buying items online, the use of other devices is still limited. Only 15,2% have sold something using a smartphone, and only 10,4% have sold items online using a tablet. 15,9% of 30-39 year olds state to sell items on online platforms at least once per month.

Online banking is a common practice in Flanders, as 3 in 4 claim to manage their banking affairs at least once per month via an online or mobile service on any device (74,9%). The computer is still the most-commonly used device for online banking. 7 in 10 Flemings have used an online banking service by means of a computer (69,3%). 60,8% do so on a monthly basis, and 40,7% state using banking tools via a computer every week. Over 4 in 10 Flemings have used a smartphone for banking affairs (41,4%). For most of them, this is a monthly (39,4%) or a weekly (33,5%) practice. Online banking is most popular among 20-49 year old Flemings, as over 8 in 10 of 40-49 year olds (85,1%) and over 9 in 10 of 20-39 year olds (20-29: 90,7%; 30-39: 93,0%) use an online or mobile banking application on any device at least once every month.

BUYING ITEMS ONLINE

	Computer	Smartphone	Tablet	Smart TV
Never	35,0%	74,0%	79,8%	98,7%
Less than annually	9,5%	5,2%	4,3%	0,8%
Annually	7,2%	2,7%	2,0%	0,2%
Every 6 months	19,1%	6,7%	6,2%	0,1%
Monthly	25,3%	9,1%	6,3%	0,0%
Weekly	3,5%	2,0%	1,4%	0,1%
Daily	0,5%	0,4%	0,0%	0,0%

General media table 1: 'How frequently do you buy items online using the devices below? (e.g. on 2ehands.be, Bol.com, Zalando)' - split by age group (N=2.345)

SELLING ITEMS ONLINE

	Computer	Smartphone	Tablet	Smart TV
Never	60,9%	84,8%	89,6%	98,7%
Less than annually	14,3%	6,0%	4,1%	0,8%
Annually	8,2%	2,1%	1,5%	0,0%
Every 6 months	10,9%	4,3%	2,9%	0,0%
Monthly	4,3%	2,1%	1,5%	0,2%
Weekly	0,9%	0,5%	0,1%	0,0%
Daily	0,4%	0,3%	0,4%	0,2%

General media table 2: 'How frequently do you sell items online using the devices below? (e.g. via your own webshop, on Kapaza, on eBay)' - split by age group (N=2.345)

ONLINE/MOBILE BANKING

	Computer	Smartphone	Tablet	Smart TV
Never	30,7%	58,6%	79,1%	99,3%
Less than annually	2,7%	0,8%	1,2%	0,3%
Annually	1,4%	0,4%	0,4%	0,1%
Every 6 months	4,3%	0,9%	1,7%	0,0%
Monthly	20,2%	5,9%	4,7%	0,1%
Weekly	34,1%	22,5%	11,0%	0,1%
Daily	6,6%	10,9%	2,1%	0,2%

General media table 3: 'How frequently do you manage your banking affairs online using the devices below? (e.g. via website or mobile app of a bank)' - split by age group (N=2.345)

E-COMMERCE AND ONLINE BANKING ON A MONTHLY BASIS ON ANY DEVICE - SPLIT BY AGE GROUP

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Buy online	29,5%	**43,1%**	**55,1%**	**45,3%**	29,5%	17,6%	11,5%	32,3%
Sell online	2,9%	**7,4%**	**15,9%**	**9,4%**	6,4%	3,1%	2,2%	6,9%
Online banking	58,8%	**90,7%**	**93,0%**	**85,1%**	73,9%	67,3%	55,5%	74,9%

General media table 4: E-commerce and online banking on a monthly basis on any device - split by age group (N=2.345)

SMART HOME APPLICATIONS

AWARENESS AND INTEREST

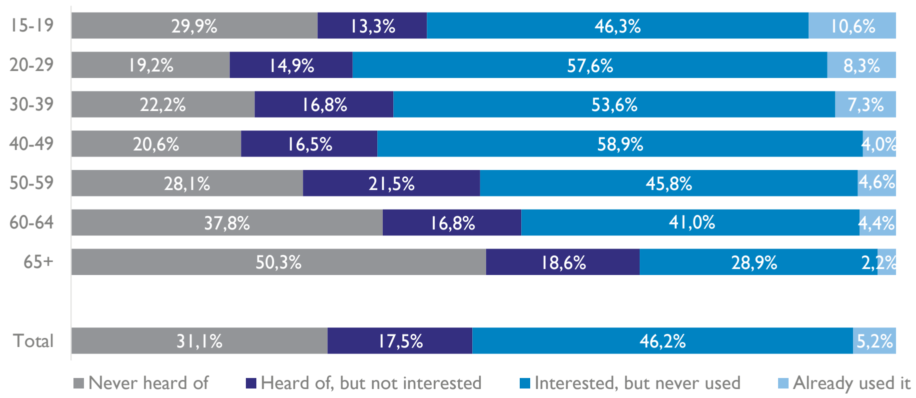
Overall, it seems that smart home applications have substantial untapped potential. Smart applications such as smart thermostats, smart lights and smart locks generate interest in a large portion of the Flemish population, but only a small fraction has ever used one of these applications. It seems that 20-49 year old Flemings in particular have a pronounced opinion on the added value of smart home applications, as this age range features both a large share that is interested but has never used it, and a large share that is not interested in the listed smart applications.

In the imec digimeter questionnaire, a smart thermostat was described as a thermostat that manages the heating in the most efficient and economical way, and which can be controlled and monitored through an app on a mobile device. Examples include Nest thermostat, Boxx (Engie Electrabel) and Anna (Eni). 3 in 10 of the Flemish population have never heard of a smart thermostat (31,1%). Among Flemings aged 65+, this is 50,3%. Of the 7 in 10 Flemings who are aware of the existence of smart thermostats, only 17,5% are not interested in the functionality of a smart thermostat. That means that over half of the Flemish population is aware of and interested in smart thermostats (51,6%): 46,2% is interested, but has never had one themselves, while only 5,2% has used a smart thermostat. Although there is a negative correlation with age (the older the Fleming, the less likely they will be interested in smart thermostats), we can see that 3 in 10 of 65+ year old Flemings are interested in (but have never tried) a smart thermostat (28,9%).

Smart lights (such as the Philips Hue) were described as (a set of) lights that can be controlled through an app on a smartphone or tablet. Most smart lights include the possibility of not only switching the lights on and off, but also creating an atmospheric lighting ambiance by adjusting the luminosity and the color of the lights. Just as with smart thermostats, only 3 in 10 Flemings have never heard of smart lights (30,9%). Among 65+ year olds, this is 49,4%. But it seems that smart lights are considered in general as a less-interesting product compared to smart thermostats, as a quarter of Flemings state knowing that smart lights exist, but not being interested in them (23,7%, compared to 17,5% for smart thermostats). However, even smart lights still have substantial untapped potential, as over 4 in 10 Flemings claim to be interested in smart lighting, but have never used it. Only 4,1% report to have ever used a smart light.

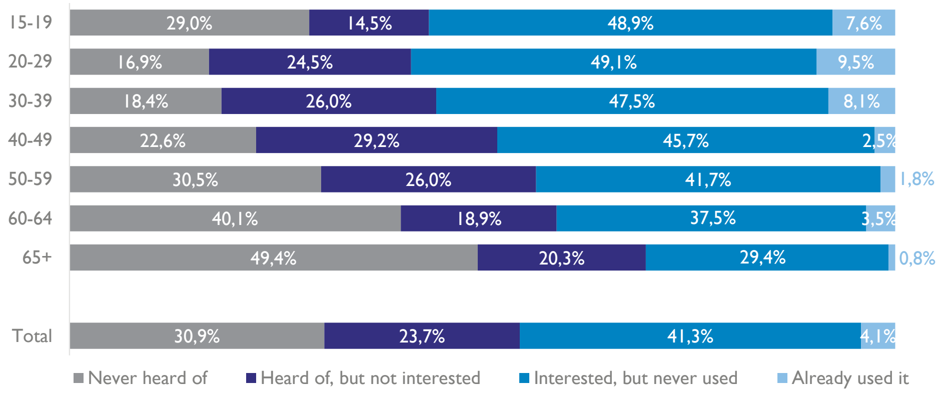
Smart locks can be controlled from a distance (e.g. by means of an app), and allow access to be granted to specific people. This is a slightly less-common smart application compared to smart thermostats and smart lighting, as 35,0% have never heard of smart locks. A quarter of Flemings know of smart locks, but are not interested (24,2%). 38,8% of Flemings are interested in smart locks, but have never used them. Merely 1,9% claim to have already used smart locks.

A SMART THERMOSTAT: INTEREST AND AWARENESS



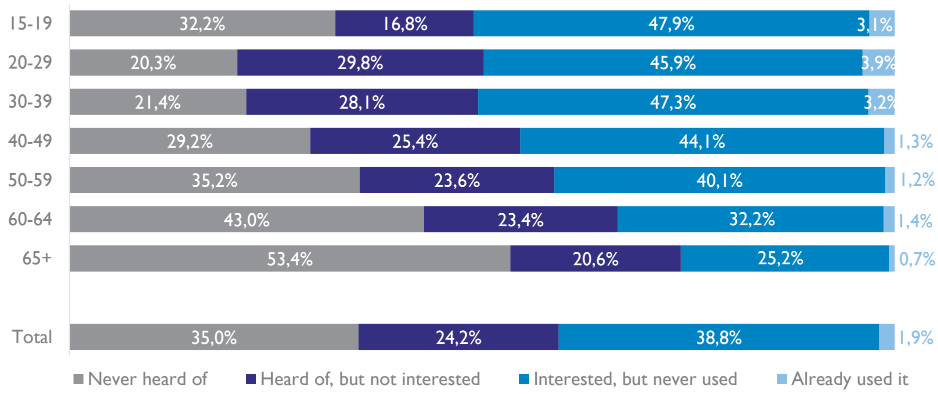
General media graph 1: 'How interested are you in the listed smart home applications, and which have you already used?' – smart thermostat (N= 2.345)

SMART LIGHTS: INTEREST AND AWARENESS



General media graph 2: 'How interested are you in the listed smart home applications, and which have you already used?' – smart lights (N= 2.345)

SMART LOCKS ON DOORS AND WINDOWS: INTEREST AND AWARENESS



General media graph 3: 'How interested are you in the listed smart home applications, and which have you already used?' – smart locks on doors and windows (N= 2.345)

FUTURE INTERFACES OF HOME APPLIANCES

We asked respondents how they think they will operate and interact with home appliances 10 years from now. In general, Flemings don't think that the interfaces will change a lot, as buttons on the appliances are still considered to be an important operating interface for most appliances. Flemings (at least 58%) imagine that washing machines and kitchen appliances in particular will still be operated by pressing or turning buttons on the appliance. A substantial portion of Flemings are convinced that mobile apps will also be a way to operate washing machines (25,1%) and coffee machines (21,1%). For dampers and cooking ranges, the use of sensors to automatically manage the appliances are considered more of an alternative to physical buttons on the appliance (18,0% and 11,8%, respectively).

Flemings think that using a mobile app to control heating, lighting and roll-down shutters will be as common as simply using buttons. About a fifth to a quarter of the population believe that the heating, lights and shutters will be automatically controlled by sensors.

Opening and closing the garage door and operating entertainment devices are most likely to be (still) done by a remote control specifically designed for that purpose. Using a mobile app comes in second place.

More advanced interfaces such as voice commands or gestures are not expected to be commonplace in 10 years. Entertainment devices seem to be the first applications where those operating modes will find acceptance, as a quarter of Flemings believe that 10 years from now, they will use spoken commands to control the TV or sound system (23,7%), while 8,0% believe that they will operate the TV or other entertainment devices through gestures.

FUTURE INTERFACES AND OPERATING MODES OF HOME APPLIANCES

	Buttons on appliance	Mobile app	Specific remote control	Voice commands	Gestures	Automatic through sensors	Not applicable
Washing machine	59,9%	25,1%	9,7%	13,2%	1,7%	11,0%	5,0%
Damper	59,6%	10,4%	11,6%	10,1%	3,8%	18,0%	7,2%
Cooking range	68,6%	10,4%	7,7%	10,3%	3,6%	11,8%	5,7%
Coffee machine	58,4%	21,1%	8,7%	12,7%	2,9%	8,7%	10,9%
Heating	35,5%	41,6%	20,0%	10,6%	2,1%	23,2%	5,7%
Lighting	42,3%	37,1%	19,3%	14,4%	6,9%	25,9%	5,0%
Roll-down shutters	28,9%	30,7%	23,5%	10,2%	3,7%	20,3%	21,1%
Garage door	23,5%	29,4%	33,7%	7,9%	2,8%	19,7%	21,1%
Entertainment devices *(e.g. TV, radio)*	29,8%	38,8%	42,5%	23,7%	8,0%	8,5%	5,6%

General media table 5: 'How do you think you will operate the following appliances 10 years from now?' (N=2.345)

VOICE-CONTROLLED VIRTUAL ASSISTANTS

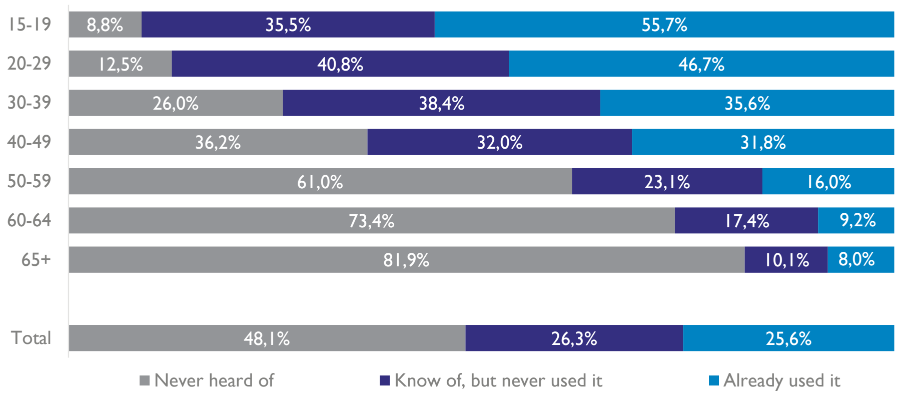
The common way to operate a smartphone or other 'smart' devices is by physical contact (e.g. tapping/clicking, swiping, etc.) or with textual input. Another type of interface is by 'talking' to the device. In the early days of speech technology, users had to utter specific commands in order for the 'machine' to understand what it had to do. Thanks to the rise of artificial intelligence, it is now possible to simply ask a question or give an instruction in a more natural, 'conversational' way. Those voice-controlled, virtual 'assistants' can be integrated into smartphones, and other devices such as smart speakers (i.e. speakers with integrated microphones that can capture voice commands and return a spoken reply or play the song requensted by the user, for instance). Amazon (Echo), Apple (Homepod) and Google (Home) are arguably the most prominent players in the field of smart speakers (and voice assistants in general).

In Flanders, however, virtual assistants controlled by voice are not that common. Half of the Flemish population has never heard of Siri, the smart assistant incorporated into Apple devices and one of the first voice-controlled assistants active in Flanders (48,1%). A quarter of Flemings have already used Siri (25,6%), while another quarter know of Siri, but have never tried it themselves (26,3%). There is a clear link with age, as familiarity with Siri decreases with age. For instance, 55,7% of 15-19 year old Flemings have already used Siri, while 81,9% of Flemings aged 65 and older have never even heard of Siri. And, not surprisingly, there is a clear relationship between using Siri and using Apple products in general (and iPhone in particular). Over 6 in 10 of Flemings who own an iPhone have used Siri, in comparison with only 12,4% of Flemings who don't have an iPhone and 25,6% within the total Flemish population.

Alexa, the voice-controlled assistant of Amazon, and Cortana (the smart assistant of Microsoft) are still only known by a small niche of the Flemish population, as over 8 in 10 Flemings have never heard of them. Just as with Siri, there is a clear relationship with age. But some 7 in 10 of Flemings younger than 40 years old have never heard of Alexa or Cortana.

2 in 3 Flemings have never heard of Google Assistant, the smart assistant of Google (65,2%), and 1 in 8 have already used it (12,3%). We should note that Google Assistant can be confused with Google Now, a smart assistant developed earlier by Google. Google Assistant and Google Now are similar in many ways. The main difference is that Google Assistant is considered to be 'smarter' (it is more capable of filtering the most relevant answers, and it offers a more 'personal' approach)[29].

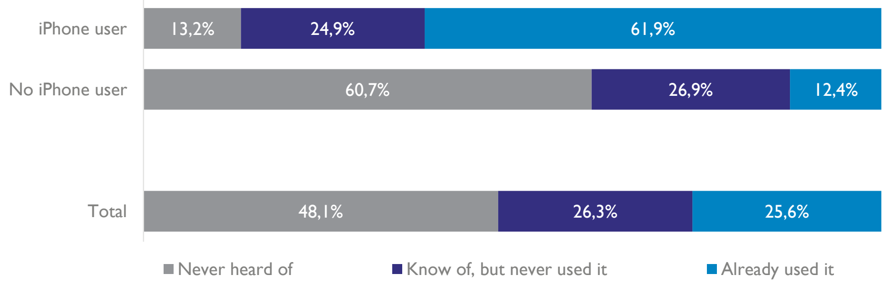
SIRI (APPLE) – SPLIT BY AGE GROUP



General media graph 4: 'How familiar are you with the listed voice-controlled virtual assistants, and which have you already used?' – Siri (Apple). Split by age group (N= 2.345)

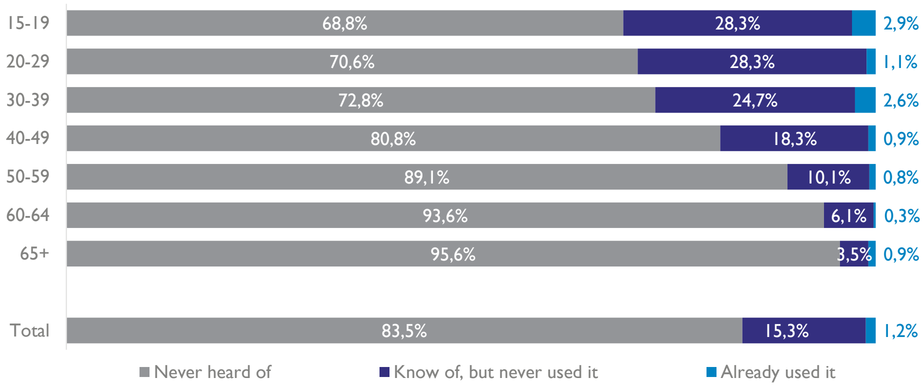
29 https://www.cnet.com/how-to/the-difference-between-google-now-and-google-assistant/

SIRI (APPLE) – SPLIT BY IPHONE POSSESSION



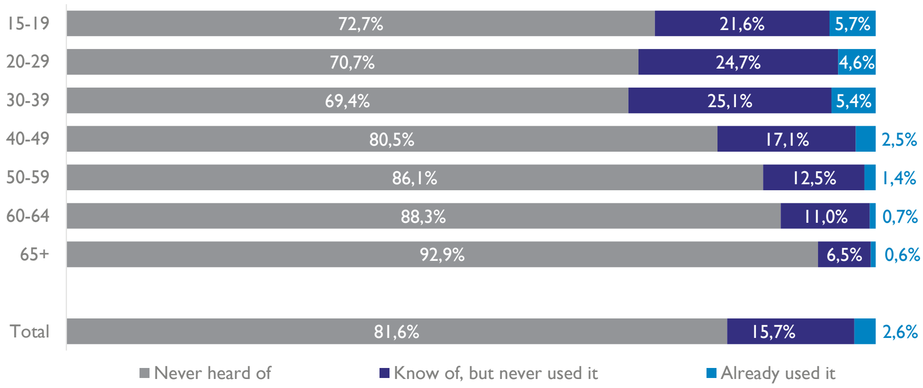
General media graph 5: 'How familiar are you with the listed voice-controlled virtual assistants, and which have you already used?' – Siri (Apple), split by owning an iPhone or not (N= 2.345)

ALEXA (AMAZON) – SPLIT BY AGE GROUP



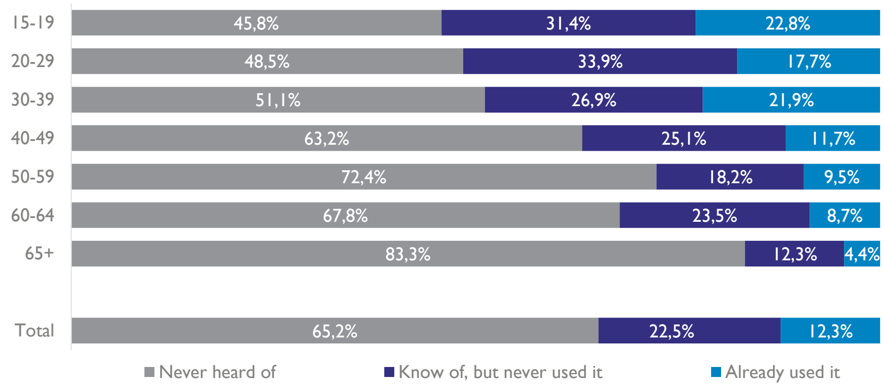
General media graph 6: 'How familiar are you with the listed voice-controlled virtual assistants, and which have you already used?' – Alexa (Amazon), split by age group (N= 2.345)

CORTANA (MICROSOFT) – SPLIT BY AGE GROUP



General media graph 7: 'How familiar are you with the listed voice-controlled virtual assistants, and which have you already used?' – Cortana (Microsoft), split by age group (N= 2.345)

GOOGLE ASSISTANT – SPLIT BY AGE GROUP



General media graph 8: 'How familiar are you with the listed voice-controlled virtual assistants, and which have you already used?' – Google Assistant, split by age group (N= 2.345)

ATTITUDES AND PERCEPTIONS ON DIGITAL MEDIA

PERCEPTION OF DIGITAL INVASION

14,8% of Flemings are convinced that they spend less time with their families due to the use of digital applications. This is especially true among 15-19 year olds, of which 33,5% agree with this statement.

Some 1 in 5 Flemings state feeling that they constantly need to be in touch with their work due to the presence of digital applications (21,1%). This is mainly true for Flemings younger than 50, with a peak among Flemings in their twenties (31,1%) and thirties (31,3%).

4 in 10 of the Flemish population have the feeling that digital applications have invaded their personal lives (40,5%). Among Flemings in their twenties and thirties, this is 5 in 10.

Taken together, over 1 in 5 Flemings have the feeling that digital applications have an impact on their (personal) lives. This feeling is the strongest among Flemings younger than 50 (at least 26%), with a peak among 20-29 (33,3%) and 30-39 year olds (31,7%).

PERCEPTION OF DIGITAL INVASION

	(Totally) disagree	Neutral	(Totally) agree
I spend less time with my family due to digital applications	70,7%	14,6%	14,8%
I have to be in touch with my work even during my vacation due to digital applications	53,6%	25,3%	21,1%
I feel my personal life is being invaded by digital applications	37,3%	22,2%	40,5%

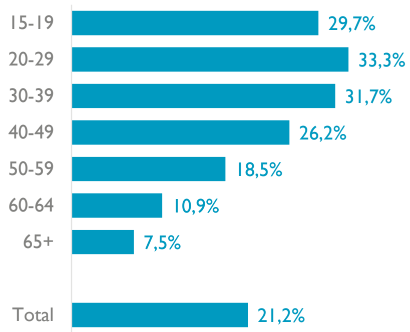
General media table 6: 'To what extent do you agree with the following statements' – Perception of digital invasion (on a 7-point scale) (N=2.345)

SHARE (TOTALLY) AGREE WITH STATEMENTS ON PERCEPTION OF DIGITAL INVASION – SPLIT BY AGE GROUP

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
I spend less time with my family due to digital applications	33,5%	23,6%	18,8%	14,0%	8,6%	14,0%	7,5%	**14,8%**
I have to be in touch with my work even during my vacation due to digital applications	27,2%	31,1%	31,3%	28,9%	21,5%	6,8%	6,8%	**21,1%**
I feel my personal life is being invaded by digital applications	38,2%	51,0%	50,4%	40,5%	40,7%	35,2%	31,0%	**40,5%**

General media table 7: Share (totally) agree with the statements on perception of digital invasion (on a 7-point scale) - split by age group (N=2.345)

PERCEPTION OF DIGITAL INVASION – SPLIT BY AGE GROUP

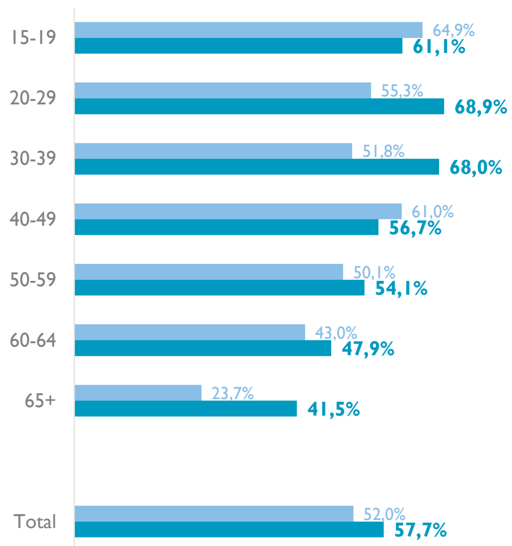


General media graph 9: Share (totally) agree with at least 2 of the 3 items on perception of digital invasion - split by age group (N= 2.345)

ADAPTING SMARTPHONE BEHAVIOR

Almost 6 in 10 smartphone owners claim that they try to manage their smartphone use by imposing rules on their smartphone behavior (57,7%, +5,7 percentage points). Among 20-39 year old Flemish smartphone owners, this is almost 7 in 10 (20-29: 68,9%, +13,6 percentage points; 30-39: 68,0%, +6,2 percentage points). Most commonly, this is done by actually putting the smartphone away at times when it can have a negative impact, for instance, during conversations or meetings (36,1%, +7,7 percentage points) or while driving (21,8%, +5,0 percentage points). The management of notifications is also an often-cited way to optimize the use of smartphones (26,3%, +4,4 percentage points). Flemings aged 20-39 years old in particular state using these rules.

ADAPTING SMARTPHONE BEHAVIOR BY IMPOSING RULES



General media graph 10: 'Do you impose rules on your smartphone behavior to regulate your use of a smartphone?' (of people with access to a smartphone, N= 1.823)

ADAPTING SMARTPHONE BEHAVIOR BY IMPOSING RULES - SPLIT BY AGE GROUP

		15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Putting away the smartphone during conversations, during meetings or during class	2016	33,7%	34,6%	33,2%	32,0%	20,0%	2,9%	14,5%	28,4%
	2017	**40,8%**	**47,7%**	**49,3%**	**36,3%**	**29,6%**	**20,8%**	**20,2%**	**36,1%**
Switching notifications on smartphone off	2016	16,5%	30,1%	27,5%	19,7%	17,0%	19,1%	7,6%	21,9%
	2017	**40,1%**	**42,9%**	**40,2%**	**26,6%**	**15,7%**	**9,2%**	**4,8%**	**26,3%**
Putting away smartphone (e.g. in the trunk of the car) while driving	2016	12,6%	25,6%	18,3%	15,1%	14,1%	10,7%	7,2%	16,8%
	2017	**14,2%**	**32,4%**	**25,9%**	**19,7%**	**18,3%**	**27,0%**	**14,0%**	**21,8%**
Keeping smartphones away from bedroom	2016	14,3%	1,7%	11,3%	14,3%	21,8%	20,9%	14,8%	12,4%
	2017	**4,7%**	**5,4%**	**14,0%**	**21,7%**	**33,7%**	**24,8%**	**26,8%**	**19,5%**
Not using smartphone just before going to bed	2016	6,8%	9,9%	11,3%	16,2%	17,1%	17,8%	2,4%	11,8%
	2017	**12,3%**	**13,2%**	**17,2%**	**16,3%**	**19,6%**	**15,4%**	**14,9%**	**16,0%**
Turning smartphone off more often	2016	8,6%	7,0%	4,1%	15,6%	1,8%	0,0%	10,2%	7,1%
	2017	**15,6%**	**7,5%**	**9,7%**	**9,7%**	**9,7%**	**8,9%**	**8,9%**	**9,6%**
Using a regular cell phone (GSM) instead of a smartphone now and then	2016	3,9%	2,5%	1,5%	2,7%	2,0%	1,7%	7,6%	3,1%
	2017	**1,0%**	**2,0%**	**0,7%**	**0,4%**	**8,3%**	**2,9%**	**2,7%**	**2,4%**
Tracking the time spent on smartphone	2016	7,3%	2,0%	2,3%	0,0%	2,5%	0,0%	1,3%	2,1%
	2017	**4,7%**	**1,3%**	**1,7%**	**0,8%**	**1,0%**	**0,5%**	**1,3%**	**1,4%**

General media table 8: 'Do you impose rules on your smartphone behavior to regulate the use of a smartphone?' - split by age group (of people with access to a smartphone, N= 1.823)

PERCEIVED ANXIETY ABOUT ENGAGING IN DIGITAL BEHAVIOR

Not everyone feels comfortable using digital applications. In fact, a considerable part of the population claims to feel anxious about using digital technology. 3 in 10 are worried about using technology, 26,2% have avoided the use of digital applications because they are not familiar with the technology, and 24,4% experience difficulties in understanding technological matters.

There is a clear relationship with age: the older the person, the more likely it is that they will experience anxiety related to the use of digital applications. Some 4 in 10 of Flemings aged 65+ have difficulties understanding technological matters (42,6%), have avoided technology because they don't feel familiar with it (41,1%) and find technological terminology confusing (40,8%).
Taken together, 1 out of 5 Flemings feel anxious about some aspects of digital technologies (19,5%). Among Flemings aged 65+, this is 1 in 3 (34,6%).

PERCEIVED ANXIETY ABOUT ENGAGING IN DIGITAL BEHAVIOR

	(Totally) disagree	Neutral	(Totally) agree
I feel worried about using technology	44,4%	26,0%	29,5%
I have avoided technology because it is unfamiliar to me	56,4%	17,5%	26,2%
Technological terminology sounds confusing to me	52,4%	23,0%	24,7%
I have difficulty understanding most technological matters	57,5%	18,2%	24,4%
I hesitate to use technology for fear of making mistakes I cannot correct	60,0%	19,1%	20,9%
I can't keep up with important technological advances	56,4%	23,2%	20,3%
When given the opportunity to use technology, I fear I might damage it in some way	68,5%	18,2%	13,3%
I lack confidence that I can learn technology-related skills	72,4%	16,6%	11,1%

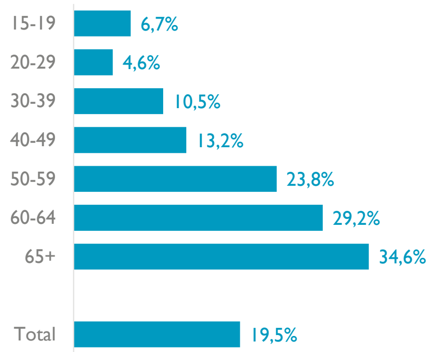
General media table 9: 'To what extent do you agree with the following statements?' – Perceived anxiety about engaging in digital behavior (on a 7-point scale) (N= 2.345)

SHARE (TOTALLY) AGREE WITH STATEMENTS ON PERCEIVED ANXIETY ABOUT ENGAGING IN DIGITAL BEHAVIOR – SPLIT BY AGE GROUP

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
I feel worried about using technology	16,7%	26,1%	30,4%	26,6%	35,1%	28,8%	32,2%	**29,5%**
I have avoided technology because it is unfamiliar to me	13,2%	9,4%	16,3%	21,8%	30,2%	37,9%	41,1%	**26,2%**
Technological terminology sounds confusing to me	10,5%	10,0%	15,7%	15,6%	29,7%	34,4%	40,8%	**24,7%**
I have difficulty understanding most technological matters	13,5%	6,4%	14,1%	14,4%	28,1%	39,0%	42,6%	**24,4%**
I hesitate to use technology for fear of making mistakes I cannot correct	7,1%	6,6%	11,8%	15,0%	25,0%	30,6%	36,1%	**20,9%**
I can't keep up with important technological advances	10,2%	11,8%	12,7%	21,7%	24,5%	19,4%	28,6%	**20,3%**
When given the opportunity to use technology, I fear I might damage it in some way	8,8%	4,4%	8,7%	7,6%	14,2%	19,0%	23,5%	**13,3%**
I lack confidence that I can learn technology-related skills	9,6%	2,4%	2,7%	8,9%	13,3%	9,7%	21,9%	**11,1%**

General media table 10: Share (totally) agree with the statements about perceived anxiety about engaging in digital behavior (on a 7-point scale) - split by age group (N= 2.345)

PERCEIVED ANXIETY ABOUT ENGAGING IN DIGITAL BEHAVIOR – SPLIT BY AGE GROUP



General media graph 11: Share (totally) agree with at least 4 of the 8 items on perceived anxiety on engaging in digital behavior - split by age group (N= 2.345)

DIGIMETER PROFILES

GENERAL MEDIA

DISRUPTOR (19,6%)

Buying or selling items via online platforms are common practices among Disruptors. 40% buy items online at least once a month (total population: 32%), 10% sell items online every month (total population: 7%). Online and mobile banking are monthly practices to 85% of Disruptors (total population: 75%).

Disruptors have generally positive attitudes towards smart home applications. 53% are interested in smart thermostats, or have even used one (total population: 51%). 49% are interested in or have already used smart lights (total population: 45%), while 43% are interested in or have already used smart locks (total population: 41%).

Awareness of voice-controlled smart assistants is high among Disruptors. Siri (Apple) is the most familiar one, with 33% having already used Siri (total population: 26%) and another 38% knowing about Siri, but not having used it yet (total population: 26%). Google Assistant comes in second place, with 20% having already used it (total population: 12%) and another 25% knowing about Google Assistant, but never having tried it (total population: 23%). Alexa (Amazon) and Cortana (Microsoft) are less familiar smart assistants, as 76% of Disruptors have never heard of Alexa (total population: 84%) and 74% have never heard of Cortana (total population: 82%).

Disruptors have the feeling that digital media can be invasive. In fact, only Media Maniacs show higher rates. 44% are convinced that digital media have invaded our personal lives (Media Maniacs: 51%; total population: 41%). 28% agree that digital media force them to stay constantly connected to work (Media Maniacs: 35%; total population: 21%). 22% claim to spend less time with their family due to digital media (Media Maniacs: 23%; total population: 15%).

As they share relatively high feelings of digital intrusiveness, they do try to regulate their digital (and mainly smartphone) behavior. 63% have imposed rules on their smartphone usage (total population: 58%), with the principal ones being putting away the smartphone during conversations, during meetings or during class (45%; total population: 36%) and turning off notifications (36%; total population: 26%).

Disruptors do feel comfortable using technology, and are not anxious at all about getting involved with digital media. Only 6% of Disruptors show overall anxiety about using digital media (total population: 15%).

MEDIA MANIAC (19,3%)

Media Maniacs are more familiar with buying and selling items through online platforms than any other segment. Likewise, online banking seems to be more popular among Media Maniacs than in any other profile. 57% buy at least once a month items online (total population: 32%), 13% sell items online every month (total population: 7%). Online or mobile banking is a monthly practice to 94% of the Disruptors (total population: 75%).

Media Maniacs have generally positive attitudes towards smart home applications. They even show the highest use rates of smart thermostats and smart lighting. 63% are interested in smart thermostats but have never used one themselves (total population: 46%), 10% have used one (total population: 5%). 57% are interested in (but have not yet used) smart lights (total population: 41%), while 12% have used smart lights (total population: 4%). 59% are interested in (but have not yet used) smart locks (total population: 39%), while 3% state to have already used smart locks (total population: 2%).

Awareness and usage of voice-controlled smart assistants is high among Media Maniacs. Siri (Apple) is the most familiar one, with 58% having already used Siri (total population: 26%) and another 29% knowing of Siri, but not having used it yet (total population: 26%). Google Assistant comes in second place, with 21% having already used it (total population: 12%) and another 38% knowing about Google Assistant, but never having tried it (total population: 23%). Alexa (Amazon) and Cortana (Microsoft) are less familiar smart assistants, as 68% of Media Maniacs have never heard of Alexa (total population: 84%) and 66% have never heard of Cortana (total population: 82%).

Media Maniacs have the strongest conviction of all segments that digital media can be invasive. 51% are convinced that digital media have invaded our personal lives (total population: 41%). 35% agree that digital media force them to stay constantly connected to work (total population: 21%). 23% claim to spend less time with their family due to digital media (total population: 15%).

Media Maniacs are aware of the intrusiveness of digital (and mainly smartphone) behavior. As such, they do show more than any other segment the tendency to try to regulate their smartphone usage. 71% have imposed rules on their smartphone usage (total population: 58%), with the principal ones being putting away the smartphone during conversations, during meetings or during class (46%; total population: 36%), turning off notifications (44%; total population: 26%) and putting away the smartphone while driving (34%; total population: 22%).

Media Maniacs do feel comfortable using technology, and are convinced that they have the skills to engage with digital media. Only 2% of Media Maniacs show overall anxiety about using digital media (total population: 15%).

AUGMENTED TRADITIONALIST (19,5%)

Buying or selling items via online platforms are common practices among Augmented Traditionalists, and is at the same level as among Disruptors. 39% buy items online at least once a month (total population: 32%), 8% sell items online every month (total population: 7%). Online or mobile banking is a monthly practice to 87% of the Augmented Traditionalists (total population: 75%). Augmented Traditionalists generally have positive attitudes towards smart home applications. 56% are interested in smart thermostats, or have even used one (total population: 51%). 48% are interested in (or have already used) smart lights (total population: 45%), while 44% are interested in (or have already used) smart locks (total population: 41%).

Awareness of voice-controlled smart assistants is lower among Augmented Traditionalists than among Disruptors or Media Maniacs, but at par with the average in the total population. Siri (Apple) is the most familiar one, with 60% having heard of or used Siri (Disruptors: 71%; Media Maniacs: 87%; total population: 52%). Google Assistant comes in second place, with 37% knowing about or having used Google Assistant (Disruptors: 45%; Media Maniacs: 58%; total population: 35%). Alexa (Amazon) and Cortana (Microsoft) are less familiar smart assistants, as 85% of Augmented Traditionalists have never heard of Alexa (total population: 84%) and 82% have never heard of Cortana (at par with total population: 82%).

Digital media form a more modest part of the media lives of Augmented Traditionalists compared to Disruptors or Media Maniacs. As such, it is no surprise that they perceive digital media as being less invasive. 42% are convinced that digital media have invaded our personal lives (Disruptors: 44%; Media Maniacs: 51%; total population: 41%). 20% agree that digital media force them to stay constantly connected to work (Disruptors: 28%; Media Maniacs: 35%; total population: 21%). 14% claim to spend less time with their family due to digital media (Disruptors: 22%; Media Maniacs: 23%; total population: 15%).

As they share lower feelings of digital intrusiveness compared to the first two segments, the share of people who have imposed rules upon themselves to manage their smartphone behavior is also smaller compared to among Disruptors and Media Maniacs. 57% have imposed rules on their smartphone usage (Disruptors: 63%; Media Maniacs: 71%; total population: 58%), with the principal ones being putting away the smartphone during conversations, during meetings or during class (35%; total population: 36%), turning off notifications (21%; total population: 26%), keeping smartphones out of the bedroom (21%; total population: 20%) and putting the smartphone away while driving (21%; total population: 22%).

Augmented Traditionalists may not be as fully digital as Disruptors or Media Maniacs, they do feel comfortable using technology, and are not anxious about getting involved with digital media. Only 7% of Disruptors show overall anxiety about using digital media (total population: 15%).

STRUGGLER (22,7%)

While online or mobile banking is a common practice among Strugglers (78%; total population: 75%), they are less familiar with buying or selling items via online platforms. 24% buy items online at least once a month (total population: 32%), 3% sell items online every month (total population: 7%).

Strugglers have generally positive attitudes towards smart home applications, albeit less positive compared to the more digitally savvy profiles (Disruptors, Media Maniacs and Augmented Traditionalists). 49% are interested in smart thermostats, or have used one (Disruptors: 53%; Media Maniacs: 73%; Augmented Traditionalists: 56%; total population: 51%). 39% are interested in (or have already used) smart lights (Disruptors: 49%; Media Maniacs: 68%; Augmented Traditionalists: 48%; total population: 45%), while

37% are interested in (or have already used) smart locks (Disruptors: 43%; Media Maniacs: 62%; Augmented Traditionalists: 44%; total population: 41%).

Awareness of voice-controlled smart assistants is low among Strugglers. Siri (Apple) is the most familiar one, with 34% having heard of or used Siri (total population: 52%). Google Assistant comes in second place, with 26% knowing of or having used Google Assistant (total population: 35%). Alexa (Amazon) and Cortana (Microsoft) are even less familiar smart assistants, as 91% of Strugglers have never heard of Alexa (total population: 84%) and 89% have never heard of Cortana (total population: 82%).
Strugglers still rely more on traditional media than on digital alternatives. As such, it is no surprise that they perceive digital media as being less invasive. 38% are convinced that digital media have invaded our personal lives (total population: 41%). 16% agree that digital media force them to stay constantly connected to work (total population: 21%). 6% claim to spend less time with their family due to digital media (total population: 15%).

As they share lower feelings of digital intrusiveness, the share of people who have imposed rules upon themselves to manage their smartphone behavior is also smaller. 47% have imposed rules on their smartphone usage (total population: 58%), with the principle ones being keeping smartphones out of the bedroom (30%; total population: 20%) and putting the smartphone away during conversations, during meetings or during class (24%; total population: 36%).

Strugglers do feel anxious about using digital media, as they are convinced that they lack the skills necessary to make use of technology and digital applications (20%; total population: 15%). 37% experience difficulties in understanding most issues concerning digital media (total population: 24%), while 36% find the terminology linked to digital applications confusing (total population: 25%). 36% of Strugglers claim to avoiding digital applications because they are not familiar with it (total population: 26%), and 31% hesitate to use digital applications because they fear to make mistakes they can't undo (total population: 21%).

RESISTOR (18,9%)

Resistors are reluctant to use digital applications. As expected, they show by far the lowest use rates of online banking applications (28%; total population: 75%), and they are not familiar with buying or selling items via online platforms. Merely 3% buy items online at least once a month (total population: 32%), and 1% sell items online every month (total population: 7%).

Resistors are generally unaware of smart home applications. 59% have never heard of smart thermostats (total population: 31%). 60% have never heard of smart lights (total population: 31%), while 63% have never heard of smart locks (total population: 35%). Awareness of voice-controlled smart assistants is also lower among Resistors compared to any other segment. 89% have never heard of Siri (Apple) (total population: 48%). 91% have never heard of Google Assistant (total population: 65%). Alexa (Amazon) and Cortana (Microsoft) are even less familiar smart assistants, as 97% of Strugglers have never heard of Alexa (total population: 84%) and 96% have never heard of Cortana (total population: 82%).

Strugglers still rely mainly on traditional media. As such, it is no surprise that they perceive digital media as being less invasive. 27% are convinced that digital media have invaded our personal lives (total population: 41%). 8% agree that digital media force them to stay constantly connected to work (total population: 21%). 10% claim to spend less time with their family due to digital media (total population: 15%).

As they experience low feelings of digital intrusiveness and show low usage of digital media, the share of people who have imposed themselves rules to manage their smartphone behavior is also small. Only 27% have imposed rules on their smartphone usage (total population: 58%), with the principal ones being putting the smartphone away during conversations, during meetings or during class (14%; total population: 36%) and keeping smartphones out of the bedroom (10%; total population: 20%).

Resistors do feel anxious about using digital media, as they are convinced that they lack the skills necessary to make use of technology and digital applications (36%; total population: 15%). 46% experience difficulties in understanding most issues concerning digital media (total population: 24%), while 45% find the terminology linked to digital applications confusing (total population: 25%). 48% of Resistors claim avoiding digital applications because they are not familiar with it (total population: 26%), and 38% hesitate to use digital applications because they fear to make mistakes they can't undo (total population: 21%).

E-commerce and online banking *(monthly basis)*

	Buy online	Sell online	Online banking
Disruptor	40%	10%	85%
Media Maniac	57%	13%	94%
Augmented Traditionalist	39%	8%	87%
Struggler	24%	3%	78%
Resistor	3%	1%	28%

Smart home: smart thermostat

	Never heard of	Not interested	Interested	Already used it
Disruptor	28%	19%	44%	9%
Media Maniac	14%	13%	63%	10%
Augmented Traditionalist	25%	19%	52%	4%
Struggler	30%	20%	47%	3%
Resistor	59%	15%	25%	1%

Smart home: smart lighting

	Never heard of	Not interested	Interested	Already used it
Disruptor	24%	27%	44%	5%
Media Maniac	13%	19%	57%	12%
Augmented Traditionalist	26%	26%	46%	3%
Struggler	31%	30%	39%	1%
Resistor	60%	17%	22%	1%

Smart home: smart locks

	Never heard of	Not interested	Interested	Already used it
Disruptor	28%	30%	39%	4%
Media Maniac	17%	20%	59%	3%
Augmented Traditionalist	31%	25%	43%	2%
Struggler	37%	26%	37%	1%
Resistor	63%	21%	17%	0%

Virtual assistants: Siri (Apple)

	Never heard of	Heard of, but never used it	Already used it
Disruptor	29%	38%	33%
Media Maniac	13%	29%	58%
Augmented Traditionalist	40%	36%	23%
Struggler	66%	21%	13%
Resistor	89%	7%	4%

Virtual assistants: Google Assistant

	Never heard of	Heard of, but never used it	Already used it
Disruptor	55%	25%	20%
Media Maniac	42%	38%	21%
Augmented Traditionalist	63%	25%	12%
Struggler	74%	19%	7%
Resistor	91%	6%	3%

Virtual assistants: Cortana (Microsoft)

	Never heard of	Heard of, but never used it	Already used it
Disruptor	74%	22%	4%
Media Maniac	66%	28%	6%
Augmented Traditionalist	82%	16%	2%
Struggler	89%	11%	0%
Resistor	96%	3%	1%

Virtual assistants: Alexa (Amazon)

	Never heard of	Heard of, but never used it	Already used it
Disruptor	76%	23%	1%
Media Maniac	68%	30%	2%
Augmented Traditionalist	85%	14%	1%
Struggler	91%	9%	1%
Resistor	97%	2%	1%

Regulating smartphone behavior *(filtered on smartphone owners)*

	At least 1 rule	Put away smartphone during conversation, meeting or class	Switch notifications off	Put away smartphone while driving *(e.g. in the trunk of the car)*	Keep smartphone away from bedroom	Not using smartphone just before going to bed
Disruptor	63%	45%	36%	18%	18%	18%
Media Maniac	71%	46%	44%	34%	12%	15%
Augmented Traditionalist	57%	35%	21%	21%	21%	15%
Struggler	47%	24%	9%	18%	30%	18%
Resistor	27%	14%	3%	9%	10%	9%

Perception of digital invasion

	Spending less time with family due to digital applications	Being constantly connected to work due to digital applications	Feeling that personal lives are invaded by digital applications	Total 'perception of digital invasion'
Disruptor	22%	28%	44%	17%
Media Maniac	23%	35%	51%	24%
Augmented Traditionalist	14%	20%	42%	14%
Struggler	6%	16%	38%	7%
Resistor	10%	8%	27%	9%

Perceived anxiety about engaging in digital behavior

	I have difficulty understanding most technological matters	Technological terminology sounds confusing to me	I have avoided technology because it is unfamiliar to me	I hesitate to use technology for fear of making mistakes I cannot correct	Total 'perceived anxiety about engaging in digital behavior'
Disruptor	13%	13%	16%	13%	6%
Media Maniac	9%	10%	10%	8%	2%
Augmented Traditionalist	16%	18%	20%	13%	7%
Struggler	37%	36%	36%	31%	20%
Resistor	46%	45%	48%	38%	36%

What is Flanders' favorite social network? How familiar are Flemish people with online video and music? And how important have smartphones become in our daily lives?

The imec.digimeter report 2017 sheds a light on Flanders' media consumption habits, the use of media devices and its attitude towards digital media and technology. The findings and results are based on an annual survey amongst 2.345 Flemings aged 15 and older.

www.imec.be/digimeter

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