

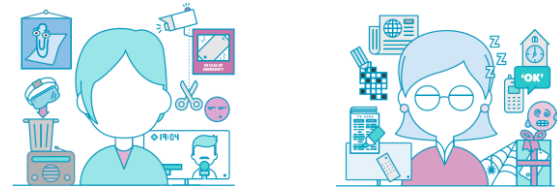
imec.digimeter 2020

Measuring digital trends in Flanders



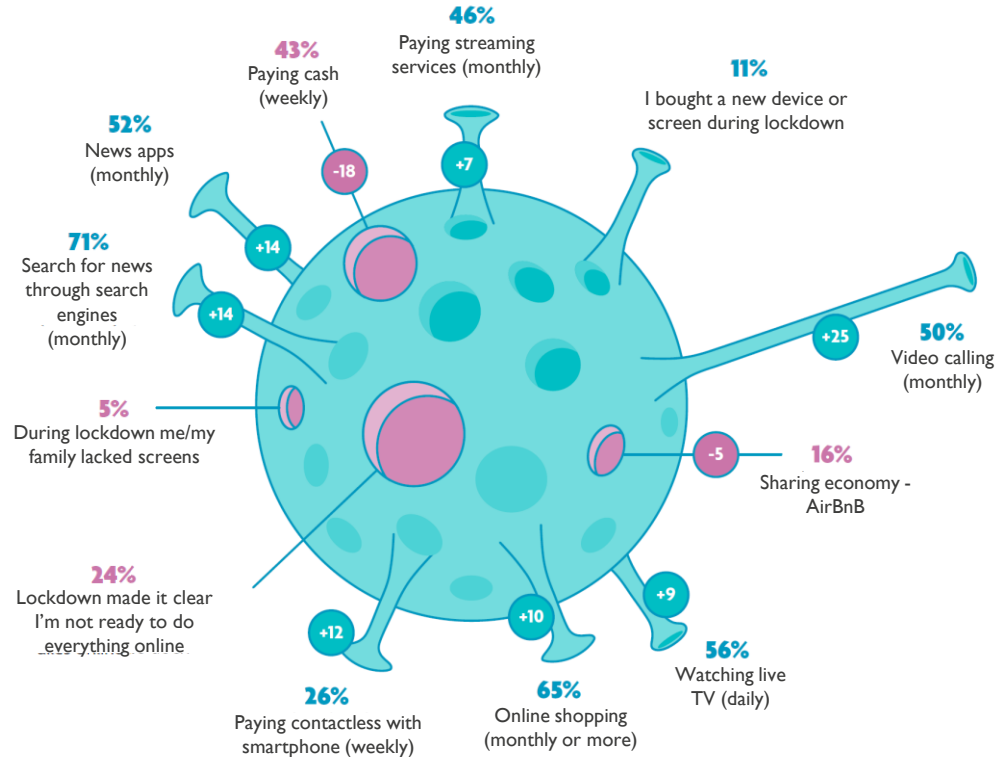
METHODOLOGY

- Since 2009 imec.digimeter has been mapping trends in the **attitudes, adoption** and **use** of media and technology in Flanders.
- 2.981 Flemish citizens (+16) were questioned representative on age, gender, education and province
 - 55% of sample is collected via **national register**
- Data collection from September → December 2020
- 3 types of profiles
- Integration of smartphone log data (MobileDNA)



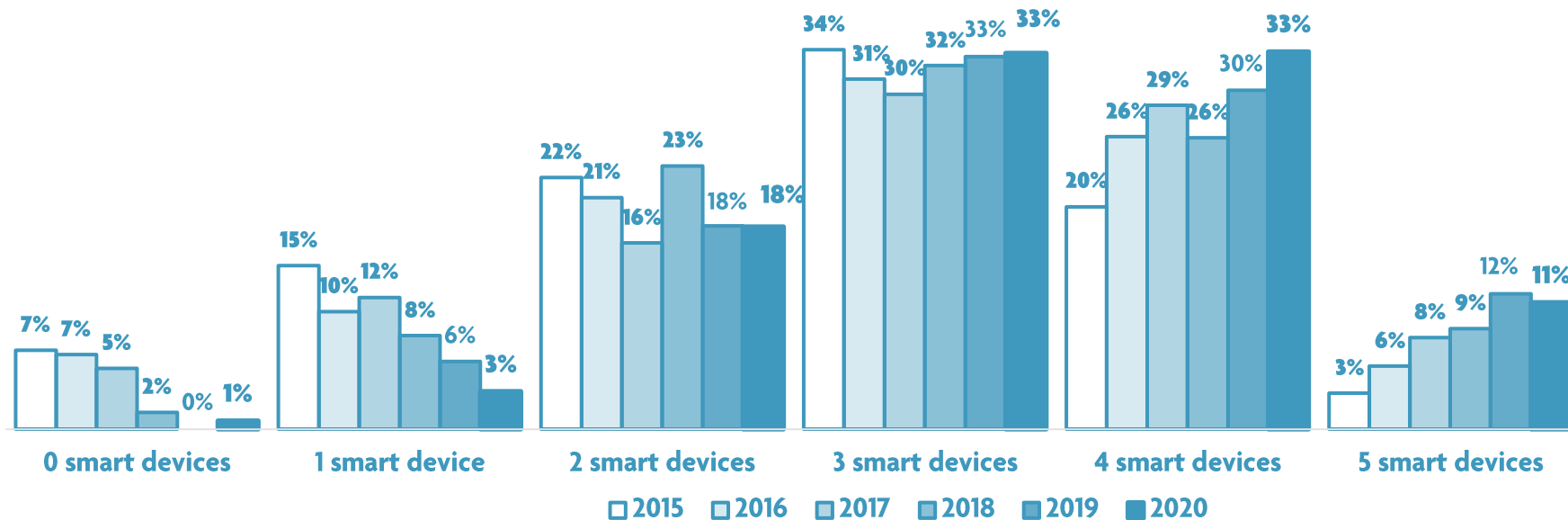
SUMMARY – IMPACT OF CORONAVIRUS

Digital acceleration but with some nuances...



ADOPTION

Smart, connected & multiscreen Flanders.

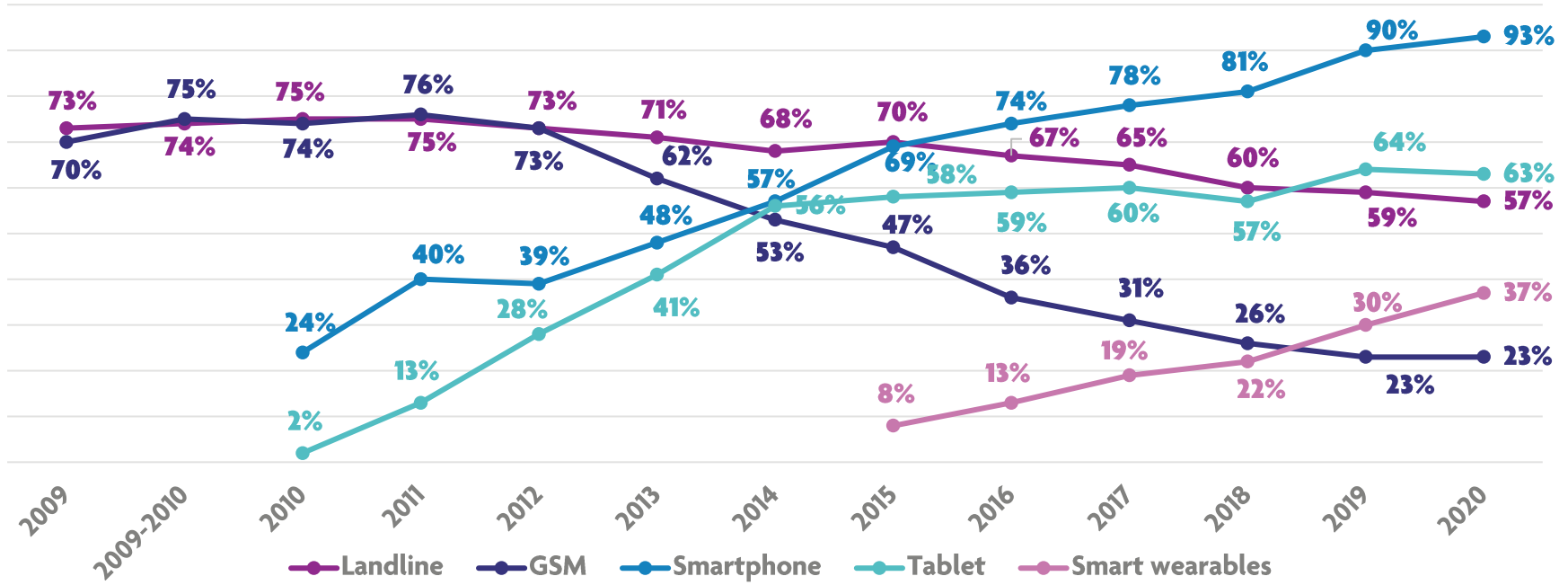


ADOPTION



The smartphone is gradually reaching its plateau. However, wearables and smart home devices continue to grow

ADOPTION

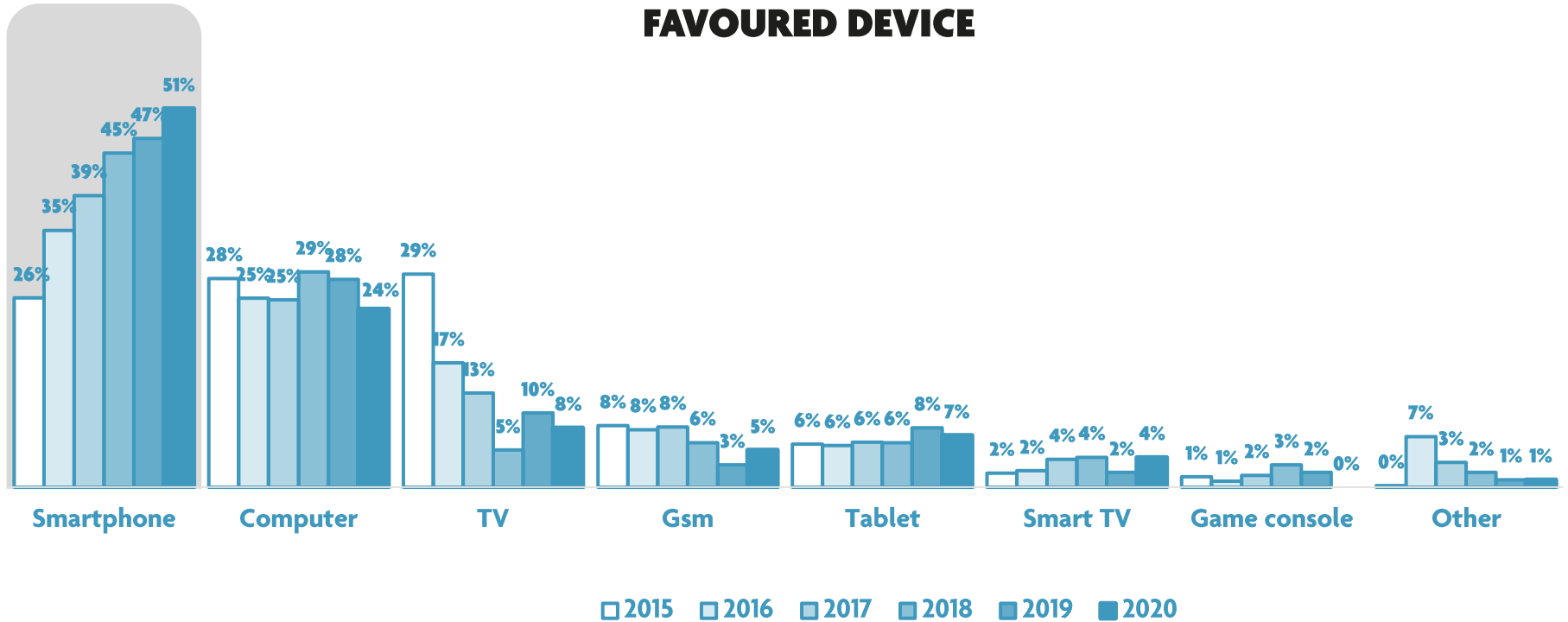


ADOPTION

The smartphone is the most loved device in Flanders



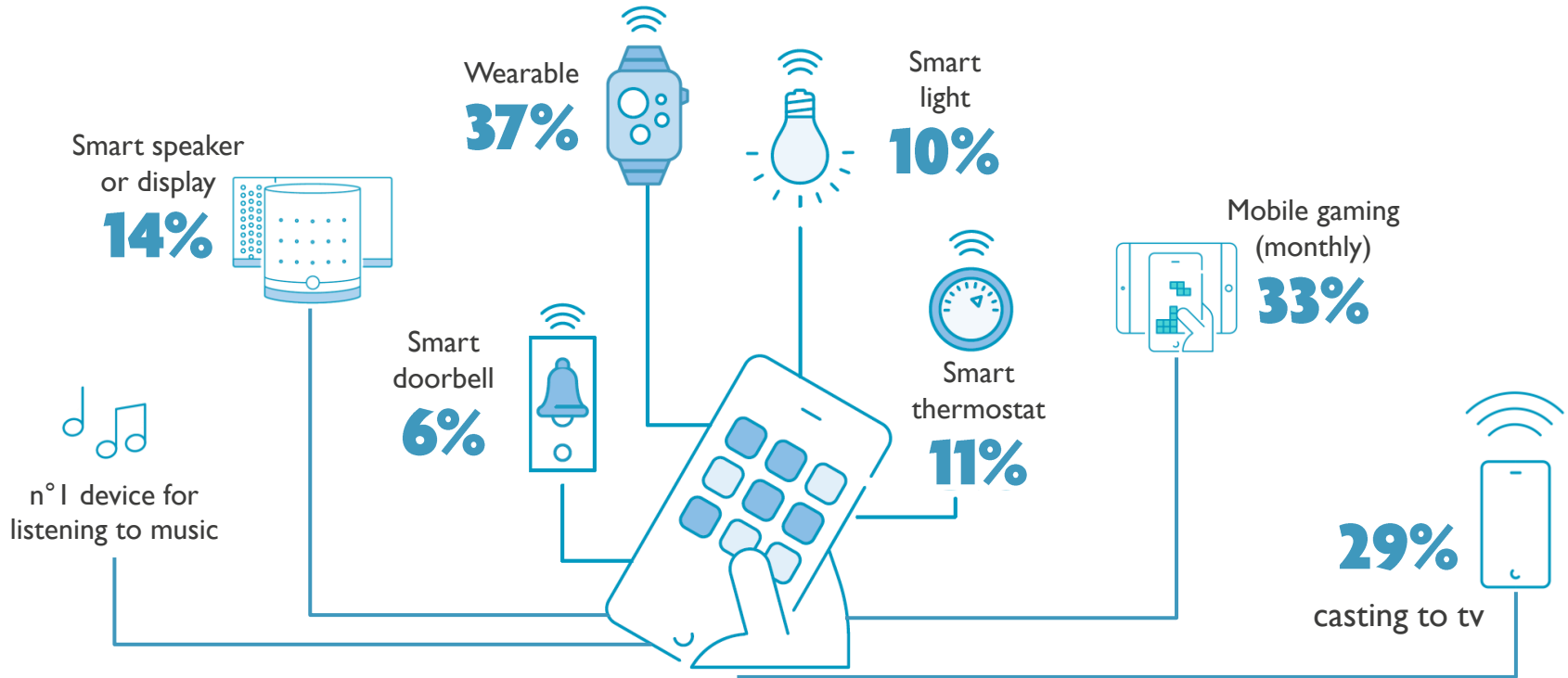
FAVOURERED DEVICE



USE – SMARTPHONE



The smartphone is the quickest rising device but also gains more and more importance as a universal remote



USE – SMARTPHONE



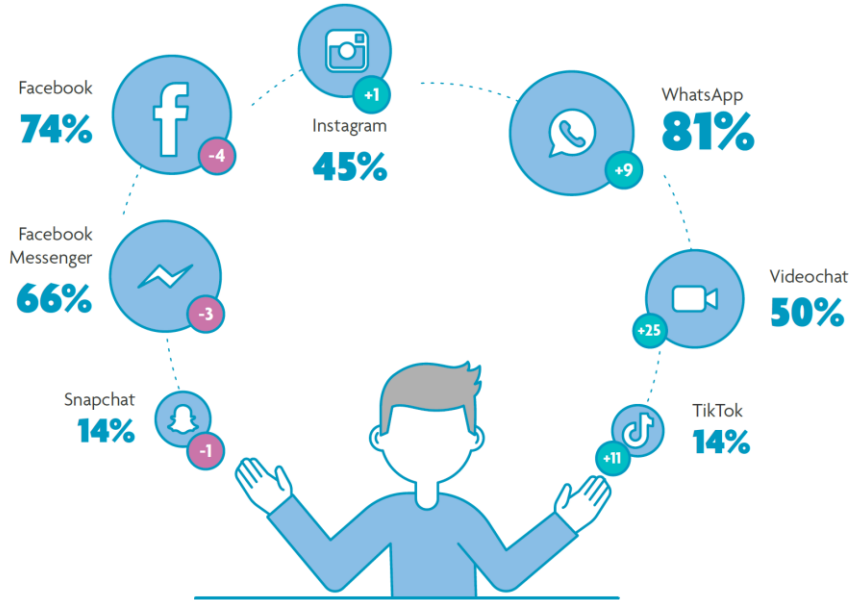
The pandemic caused a spike in smartphone use that has not completely disappeared

MOBILE SCREEN TIME



USE – SOCIAL MEDIA

More time & more platforms



More people are using social media. 84% (+3) of Flanders use it daily, even 67% (+5) of citizens older than 64 years use it daily.



23% use **4 or more social media**/chat services a day. In the youngest age group it's even 60%.

USE – SOCIAL MEDIA

More time & more platforms



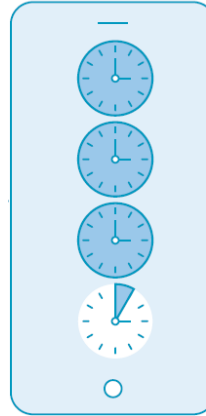
~60 min

83% ⁺⁴

Uses a **Facebook app** daily

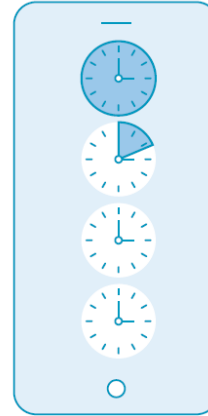


100%
total daily screen time



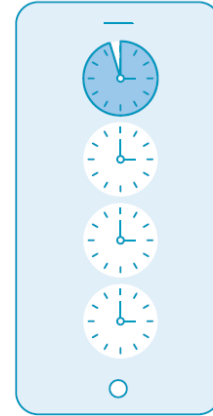
185
minutes

39% ⁺⁶
of total time goes to
social media



73
minutes

31% ⁺⁹
of total time goes to
Facebook owned
apps



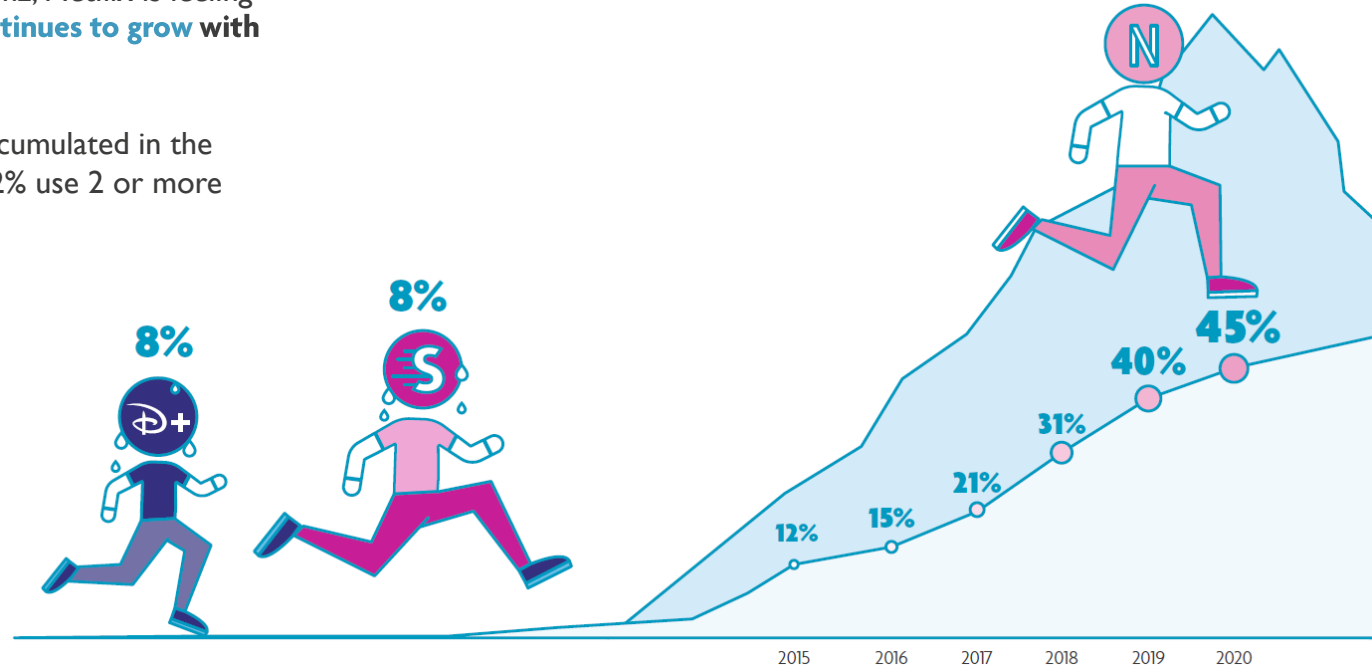
57
minutes

USE – VIDEO

Flanders is more multiplatform

With the arrival of Disney+ and Streamz, Netflix is feeling the competition. However, Netflix **continues to grow with an increase to 45% (+5) adoption.**

To what extent these services will be cumulated in the future remains to be seen, however, 12% use 2 or more paid streaming services a month.





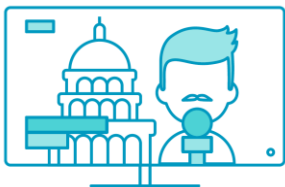
USE – LOCAL MEDIA

Classic media sources became more popular due to the pandemic

During this pandemic, many also fell back on TV channel content for entertainment. Giving this industry another opportunity to create a bond with viewers who seemed to be quietly shifting to watching entirely online. Among young people, however, this did not seem to succeed.

56% **+9**

watches live **television daily**
(no increase in youngest group)

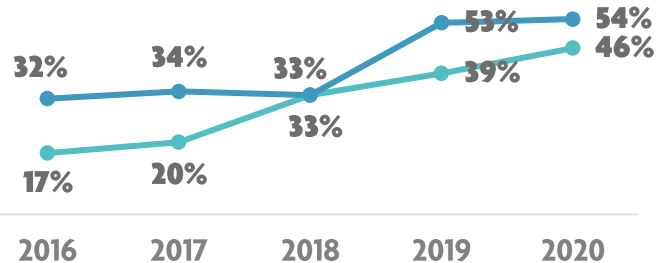


39%

watches **websites/apps of
broadcasters/providers weekly**



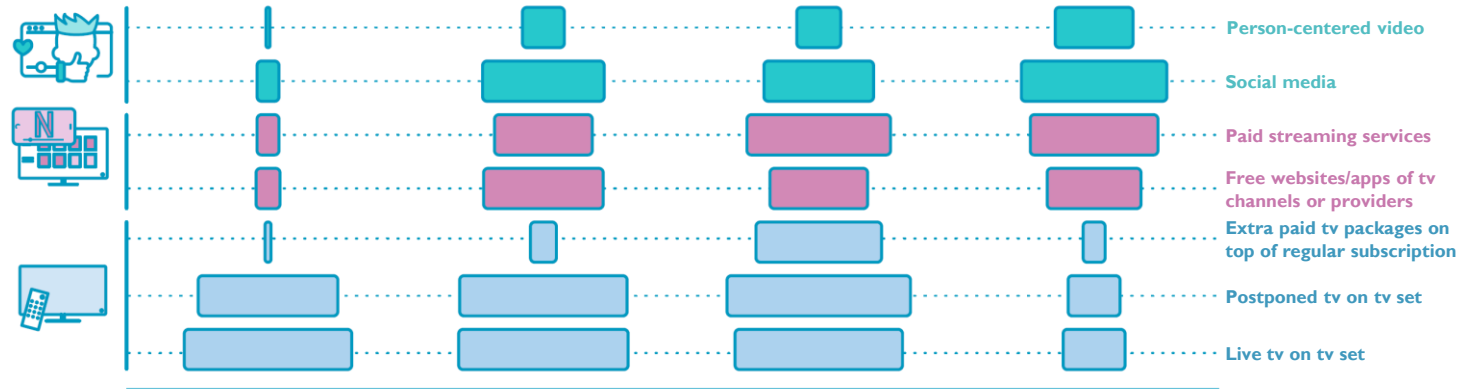
MONTHLY VIDEO ONLINE



- Video streaming platforms (ex. Netflix)
- Websites or apps of a tv-channel or tv-provider

USE – CROSSMEDIA VIDEO

We combine different video sources. 44% has a tv subscription and a streaming subscription.



Classic TV viewer

38%

Loyal to local brands
Trust in local gatekeepers for content and programming



Cross-medial TV viewer

33%

Mix of tv and online video
Stays loyal to local online brand



Cross-medial convenience viewer

9%

Mix of tv and online video
High willingness to pay for additional packages and/or streaming platforms



Self-determined streamer

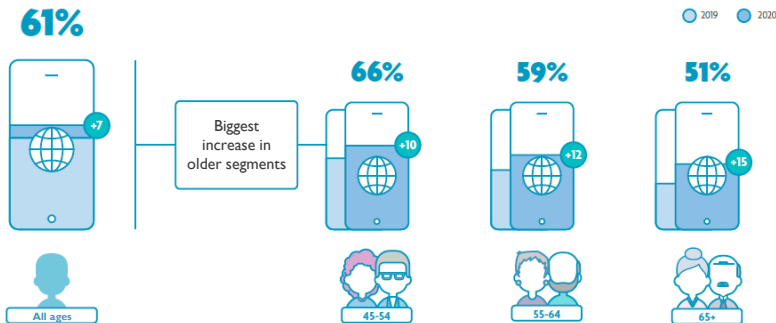
20%

Leans on social media and influencers as gatekeepers
TV is no longer their reference for consuming video

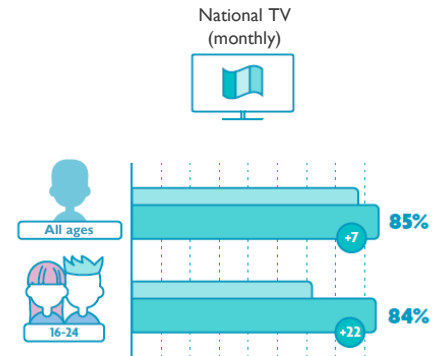
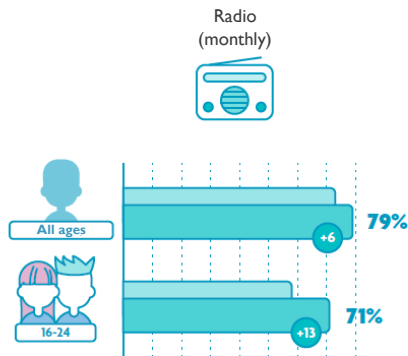


USE – DIGITAL NEWS

Digital news did well in 2020, especially apps of news brand (52%, +14).



The pandemic heightened the need for reliable news, which led to an increase in traditional news sources, especially among young people



Legend: 2019 (light blue), 2020 (dark blue)



USE – NEWS CUMULATION

Like video, news is also consumed by combining different kinds of news sources. This becomes clear through these 5 profiles.



13%

The herding shepherd

- Smartphone is the main gateway to news
- Consumes mainly online news sources
- Often checks reliability of sources



17%

The classic church owl

- Not really active news consumer, sticks to classic habits and familiar brands
- Classic trio of physical newspaper, radio and news on television
- No digital or online news



24%

The devouring eagle

- Relies mainly on (physical) newspaper and television news
- Supplements this with digital version of the newspaper, news websites and apps from the classic news brands
- High willingness to pay for news



30%

The social meerkat

- Gets most news through social media
- In addition to social media, TV is also an important source
- Doesn't usually pay for online articles, or read beyond the headline



15%

The cool frog

- Little interest in news
- Only sporadically consumes news online, based on personal interests
- Stumbles upon news through social media

USE – ONLINE SHOPPING & PAYMENT METHODS

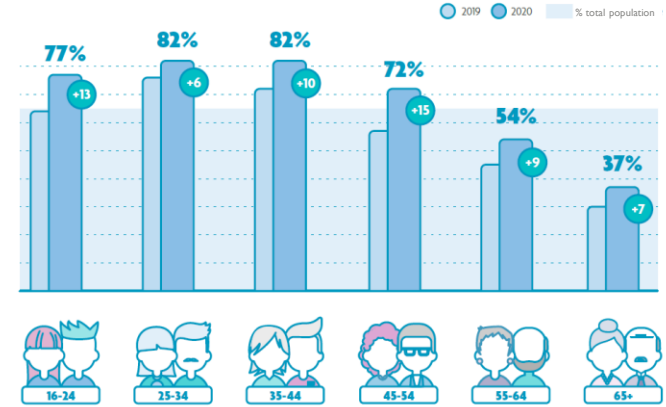


Online shopping is becoming a habit & the importance of the smartphone as a new payment method

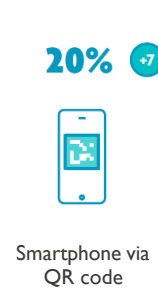
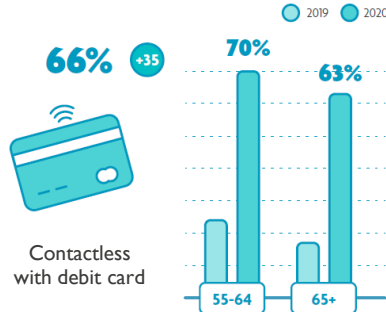
In 2019, new payment methods were on the rise. This year has meant another major acceleration, because after all nobody wanted to pay cash anymore.



65% ⁺¹⁰
buys something
online at least
monthly



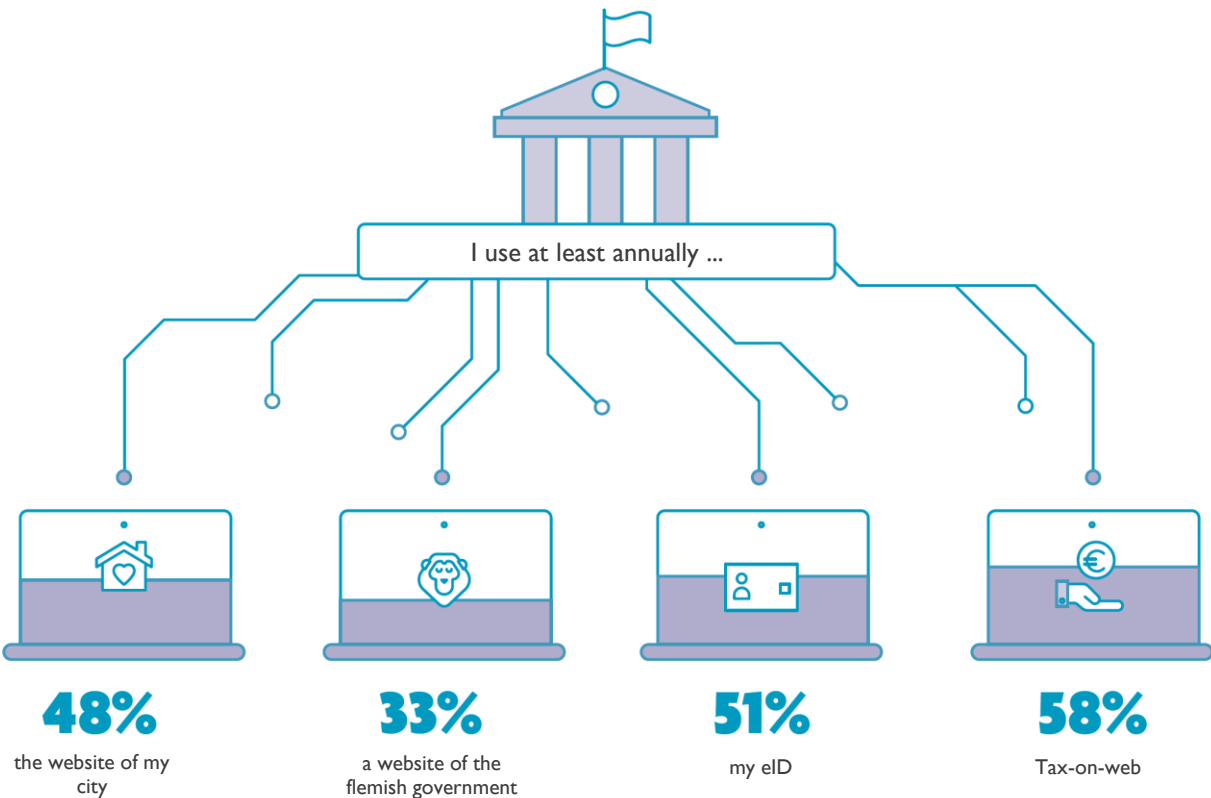
Do you use these payment methods on a weekly basis?





USE – DIGITAL GOVERNMENT

About 1 in 2 Flemings claim to use digital government at least annually



32%

I prefer to go to the counter to settle things rather than do it online



77%

I want one central place online where I can manage all my documents from the government.



61%

I want to proactively receive digital information about life events relevant to me.



FEELINGS – DIGITAL STRUGGLE

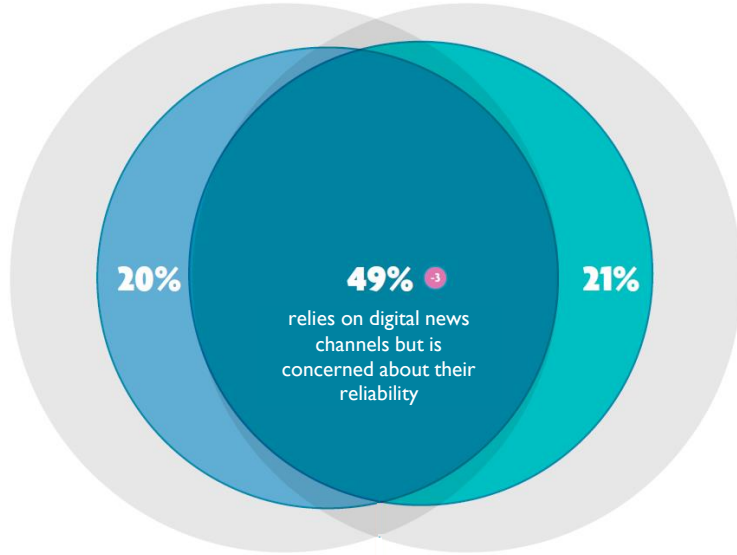
Past digital developments have left people with uncertain feelings and attitudes. We identify some dual feelings in Flanders

69%

feels better informed thanks to the internet

70%

is worried about the impact of fake news on society

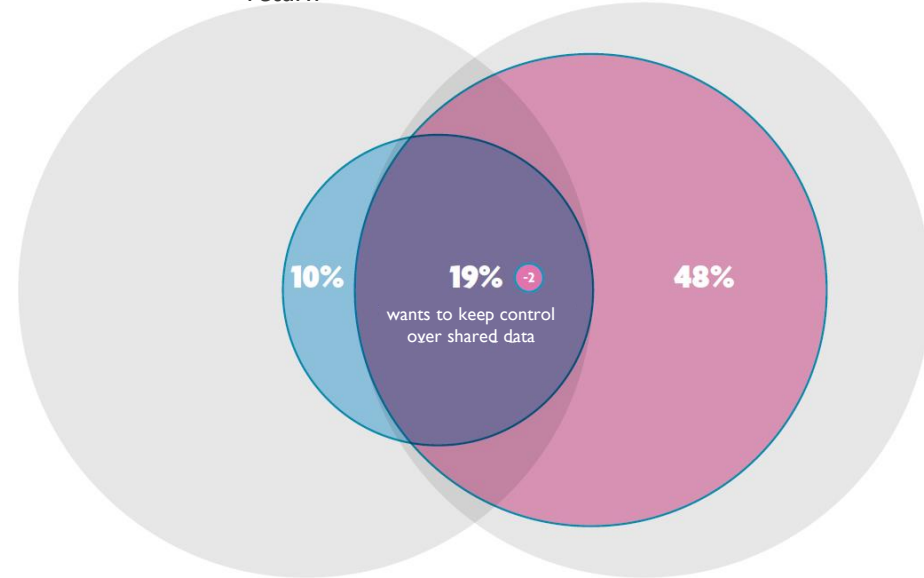


29%

I'm okay with sharing personal information as long as I get something in return

67%

companies are not transparent about what data they collect about me



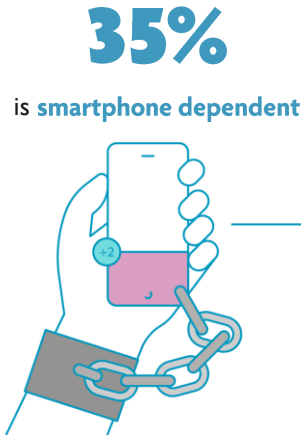
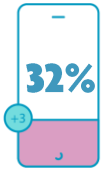


FEELINGS – DIGITAL STRUGGLE

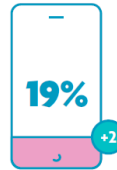
Past digital developments have left people with certain feelings and attitudes. A great deal of Flanders feels dependent on their smartphone and social media



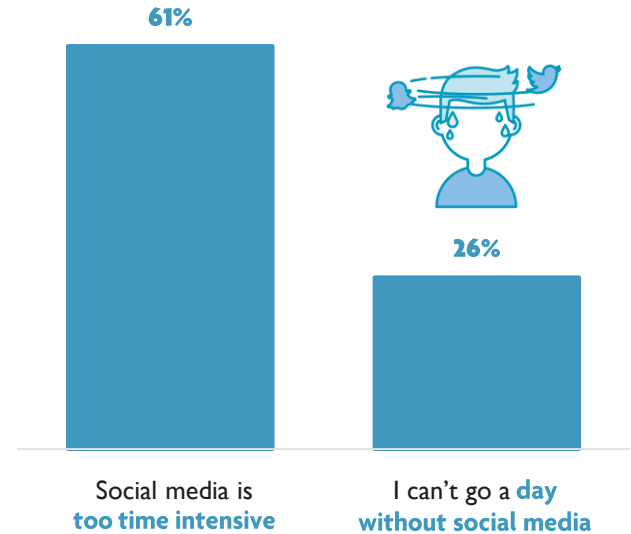
"I think I spend **too much time** on my smartphone"



"I feel **addicted** to my smartphone"



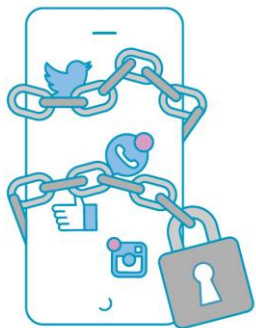
SOCIAL MEDIA





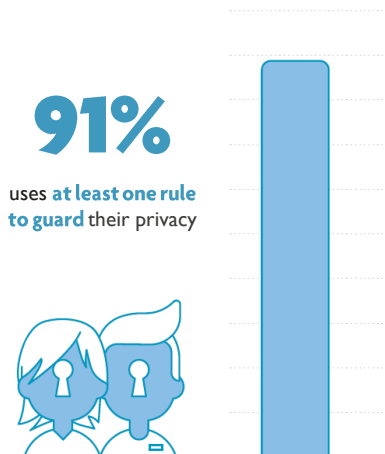
FEELINGS – TAKING CONTROL

Past digital waves have left people with certain feelings and attitudes. Some negative, and for these feelings a lot of people are taking back control



87%

imposes **rules** to control their smartphone usage



When I read a news article I think it's important the article is from a **known source**

72%



I sometimes **check** how reliable a news article is

48%

FEELINGS – ATTITUDES SEGMENTATION

5 profiles in Flanders



19%

Passionate Lover

Ready for the next step in digital transformation (AI, data economy ...)



23%

Close Friend

Struggles with their own mix of paradoxes
Empowering to take control of technology of today will be crucial to the path to technology of tomorrow



18%

Protective Companion



21%

Happy Single



18%

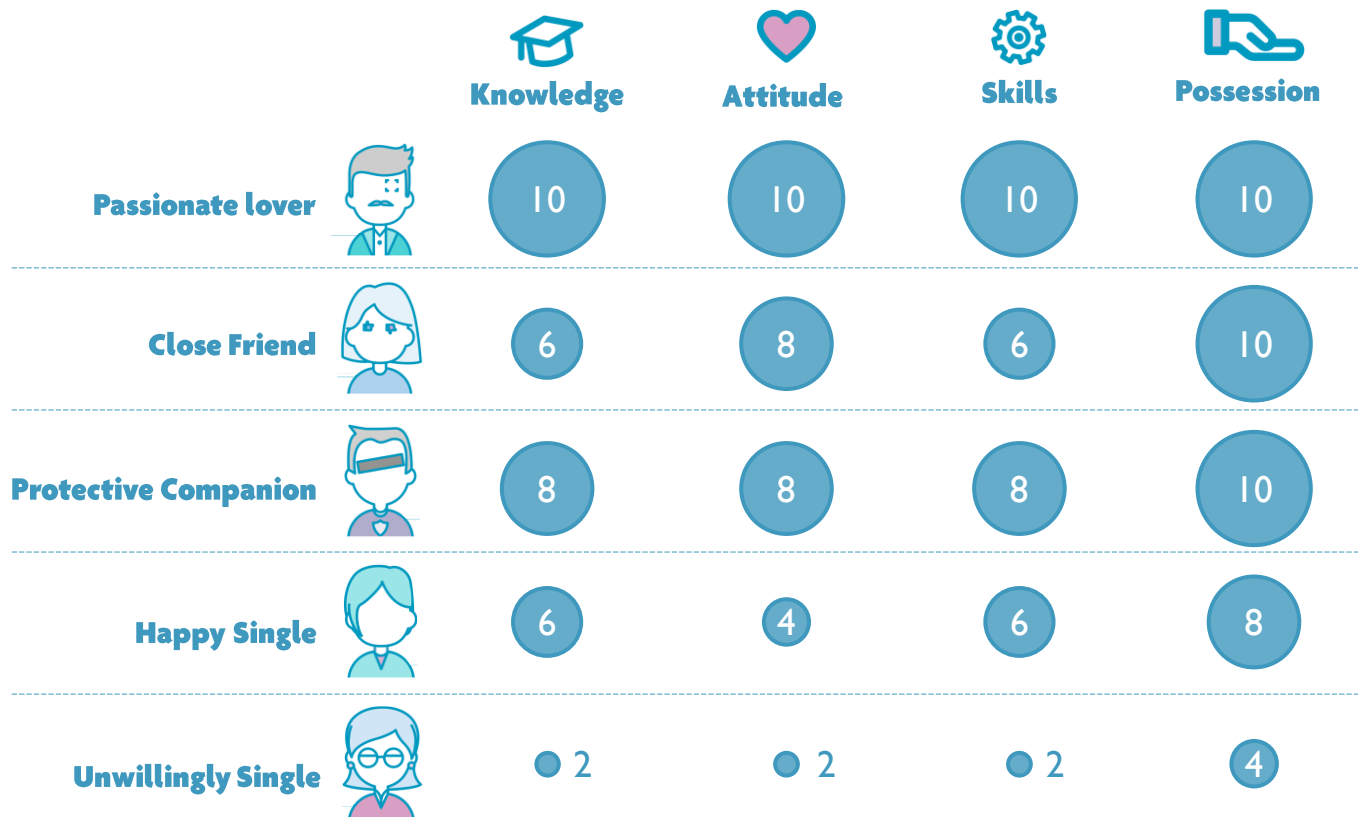
Unwillingly single

Digital Divide
Young people too!



FEELINGS – ATTITUDES SEGMENTATION

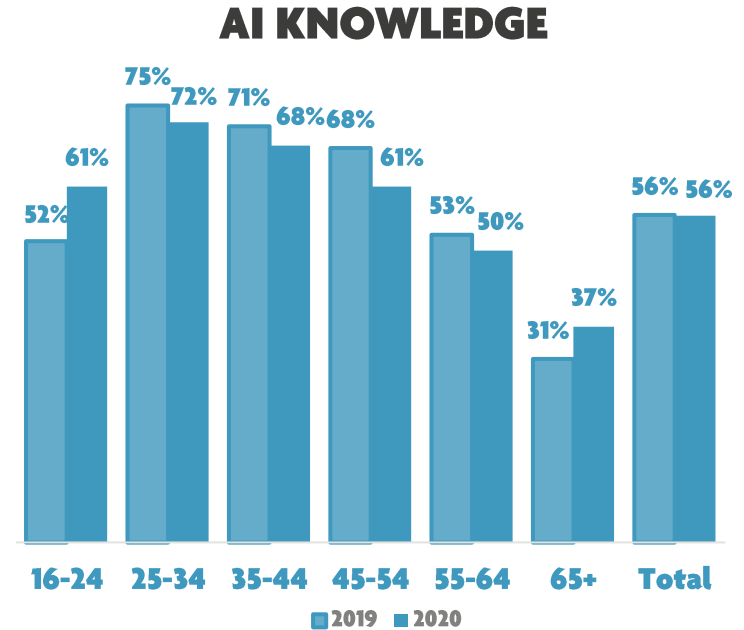
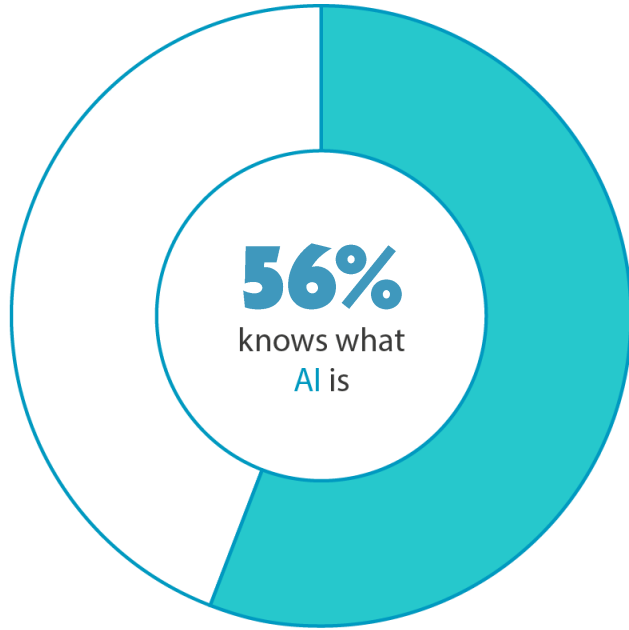
5 profiles and their knowledge, attitudes, skills and possession of digital technology



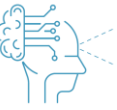


AI & DIGITAL TRANSFORMATION READINESS

Knowledge gap: 56% (thinks to) knows what AI is, but there is a surprising difference between age groups

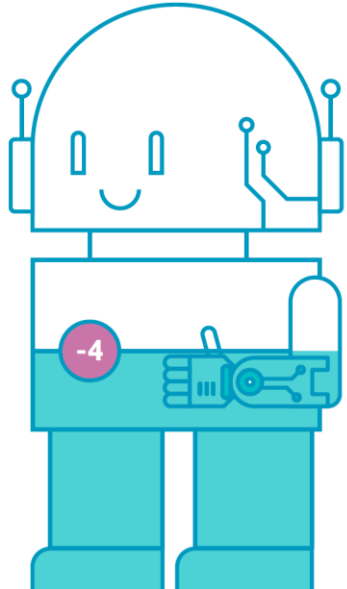


AI & DIGITAL TRANSFORMATION READINESS



41% is positive about AI, but the largest group of citizens is still doubtful

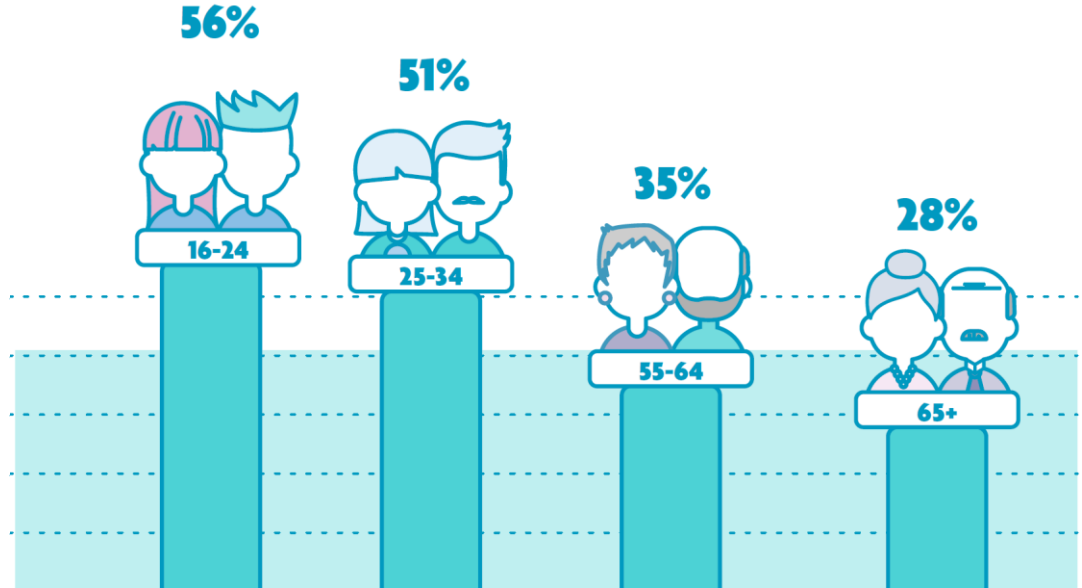
● 2020 ■ % total population



41%

is positive about AI

Youth is more positive about AI



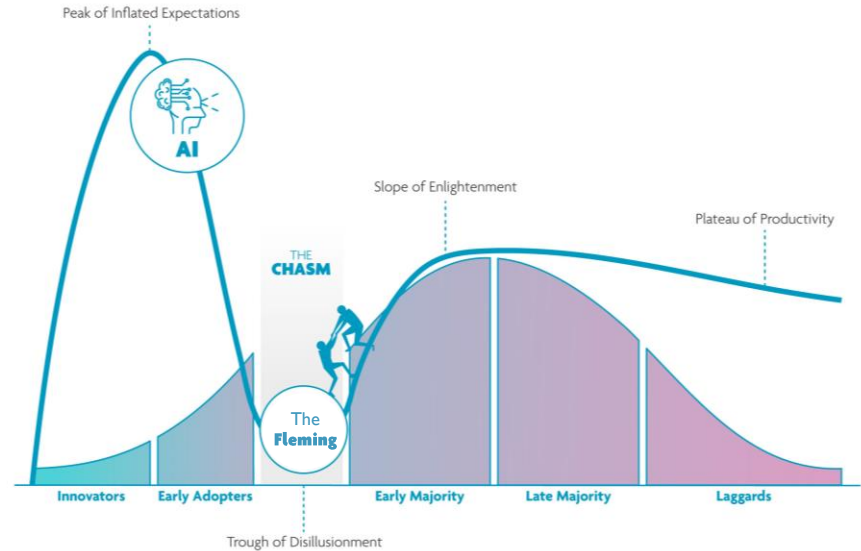
AI & DIGITAL TRANSFORMATION READINESS

The attitude profiles can be a tools to see how new technologies will be used and adopted by the Flemish people.

Flanders is ready to see new innovations. The Diffusion of Innovations theory* states that Flanders has a big enough group of people (Passionate Lovers, 19%) to adopt new technology and convince the doubting mass to do so as well.

However, we must be careful because this flow is not an automatic flow. There is a risk of 'falling into the chasm'. Therefore, innovations must be introduced in a gentle way.

To achieve this it, and to enter the next digital waves as an inclusive society, it is important that both market, policy and citizens have the same pace to cross the chasm. For instance, it is important not only to follow the pace of technology and innovators, but also to look at the pace of the general public.



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