

MEASURING  
DIGITAL MEDIA  
TRENDS  
IN FLANDERS



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# PREFACE

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

This ambition makes it indispensable for more than 850 academic researchers directly connected to iMinds, to keep up to date with trends, habits and practices of the 'demand-side' or the end-users.

Thus, the primary research goal of Digimeter is as follows:

*With the Digimeter project, iMinds Living Labs intend to gather and share data and information regarding the Flemish media and ICT user on a systematic and annual basis, adopting a representative methodology. This provides iMinds researchers with reliable data and information regarding the adoption and diffusion of (new) media and ICT, and the latest trends, habits and practices. This report serves as the public summary of this data<sup>1</sup>. Through its annual frequency, Digimeter also serves as a monitor that can detect and keep track of emerging trends and practices.*

The second research goal is tied to the detailed profiles the Digimeter project delivers:

*By carrying out the Digimeter survey on a yearly basis, including recurring respondents, as well as a substantial amount of new people in each wave, the Digimeter project allows us to build and refresh a database containing detailed profiles of end users who agree to be involved in further innovation and user research (i.e. Living Lab research facilitated by iLab.o). This user database is available for SME's, organizations and companies for research in collaboration with iMinds-Living Labs. The management of this Digimeter user panel is taken care of by the panel management staff of iMinds - Living Labs.<sup>2</sup>*

Following every Digimeter wave, the survey itself and the data gathering is subjected to critical analysis and academic reflection in order to optimize and actualize each next wave.

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

<sup>2</sup> Panel management can be contacted through panel@iminds.be or +32 9 331 48 00

In collaboration with the iMinds Media Innovation Center (MiX), the questionnaire of this wave has been reviewed by experts in the media industry.

- Belgacom
- CIM
- Mediahuis
- Medialaan
- Pebblemedia
- SBS
- Telenet
- UBA
- VRT

To avoid skewed figures in terms of Internet and computer ownership, a great amount of the recruitment of respondents has been carried out offline through trained interviewers.

We set up several recruitment events in the largest cities of Flanders (Ghent, Antwerp, Leuven, Hasselt, Mechelen, Ostend and Genk), where we attempted to capture respondents in public places such as markets, shopping streets and libraries. Even though we recruited more people in larger cities, we made sure there is representation from smaller cities. We held recruitment events in Aarschot, Haacht, Merksem, Bornem and Izegem in swimming pool cafeterias, local markets or cultural centres. We were also present at existing events such as the Boerenrock music festival, the 55+ event by the city of Antwerp and neighbourhood parties like 'Ledeberg Kermis' and the 'Tinekesfeesten' in Heule. We also provided people with the option to take a paper version home and send it to us for free.

To ensure the accuracy of the answers, we took great care with the oldest age group (+65) by assisting them in completing a paper version of the survey on an individual basis or in relatively small groups.

We owe thanks to the following organisations for their support in our recruitment efforts:

- Stad Aarschot
- Stad Antwerpen
- Stad Leuven
- Stad Gent
- Stad Genk
- Stad Hasselt
- Gemeente Haacht
- Cultuurhuis de Leest, Izegem
- Organisatie Tinekesfeesten Heule
- Organisatie Boerenrock Kortenaeken
- +55 Evenement stad Antwerpen
- IGO, Leuven
- Dekenij Ledeberg vzw
- Brasserie Borluut, Gent
- Hotel Ambassador, Oostende
- Bistro Piazza, Leuven
- Taverne Memling, Leuven
- Brasserie De Met, Mechelen
- Stadscafé, Genk
- Taverne De Zwaan, Aarschot
- Playoffs Sports Bar, Aarschot
- Rubens Inn, Antwerpen
- Brasserie Wembley, Hasselt
- Viva Sara Kaffee, Kortrijk
- Brasserie 't Zuid, Gent
- Bib Permeke, Antwerpen

Last but not least, we also want to thank all of the respondents having filled out the Digimeter survey. Without these respondents who openly shared with us their media habits and practices, this report would not have been feasible.

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# DIGIMETER METHODOLOGY

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iMinds' Digimeter is an annual monitoring of a representative set of at least 1.500 inhabitants in Flanders (at least 15 years old) on their usage and possession of (new) media and ICT.

- This is the seventh report of the Digimeter which monitors these evolutions annually.
- To allow for representative results for Flanders, a minimum quota sample of N=1500, based on the most recent federal statistics<sup>1</sup>, is defined by province, gender, age (15+) and education level. The total dataset is weighted based on the last three variables. This is a modification compared to previous waves, where education level was no sampling quatum or weighing variable. In the last two years we saw a rising participation rate of higher educated people. To prevent a bias in the results, education level has been incorporated in the sampling quota and the weighing of the final dataset.
- In the period August 2014 - September 2014 2.028 individuals have completed the survey. 871 were collected 'offline' by means of CAPI-interviews (Computer (tablet) Assisted Personal Interviews) or PAPI (Paper And Pencil Interviews). 1.157 respondents filled out the survey online (CAWI - Computer Assisted Web Interviews).
- The median time for filling out the online survey was 22 minutes 42 seconds.
- The survey consists of eight thematic chapters: TV, computer, tablet, telephony, social media sites, playing games and traditional media (radio, music and following the news) and finally general media use. Depending on their answers, respondents were directed to more questions regarding applications and other information regarding these technologies and media types. This way, Digimeter provides quantitative insights into the adoption diffusion as well as in the use diffusion of (new) media and ICT. The survey was concluded by a list of socio-demographic questions.

<sup>1</sup> The Belgian Federal Institute for statistics: FPS Economy - Statistics and figures  
(Dutch: FOD Economie - Statistieken en analyses)

- Just like every previous wave, the report concludes with a segmentation of the Flemish population. For this analysis, a K-means cluster analysis was used, based on 8 variables measuring the variety of use (TV, Computer, Tablet, Smartphone, Social Network, Games, Music and News) and 6 variables measuring the frequency of use (TV, Computer, Tablet, Social Network, Games and News), to construct 5 segments.
- Digimeter gives a snapshot view of adoption and use of media and ICT. It is also based on the self-reporting of media consumers; as such, the results should be interpreted as the perception respondents have of their media consumption. The methodology does not allow to make assumptions on the effective reach of media.
- The survey investigates the adoption of devices within the household: Who has access to a device or service in her/his household? We do not measure personal ownership of a device (except for mobile phones). Nor do we make assumptions on a pure household level (how many households own a device or subscription to a service). The latter would imply a totally different data gathering method and sampling quota.
- Numbers with a \* added, report the evolution with regard to the previous wave. This evolution is expressed as percentage points (the absolute difference between two percentages). For instance: When adoption increases from 20% to 30%, that is an increase of 10 percentage points; expressed as a (relative) percentage, the same growth is an increase of 50% (because the growth of 10% is 50% of the starting point 20%).
- All respondents had an equal chance of winning vouchers with a total amount of €1.800.

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# GENERAL ADOPTION

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## MEDIA & ICT ADOPTION IN FLANDERS - 2009 TO 2014

Adoption of computers (both laptops or computers) has stabilized at 92,0% (-0,4)\*. The laptop remains the most popular type of computer at an adoption of 79,4% (+0,7)\*, whereas 54,3% (-1,0)\* have access to a desktop in their household. Over 9 in 10 people in Flanders (92,4%) have access to an internet connection in their households.

After the significant drop last year, game consoles have stabilized at 29,4% (+1,5%)\* for TV-connected consoles and 14,5% (+0,4%)\* for handheld consoles. Almost 1 in 3 Flemings has access to a TV-connected game console in their households, and 1 in 7 has a handheld game console in their households.

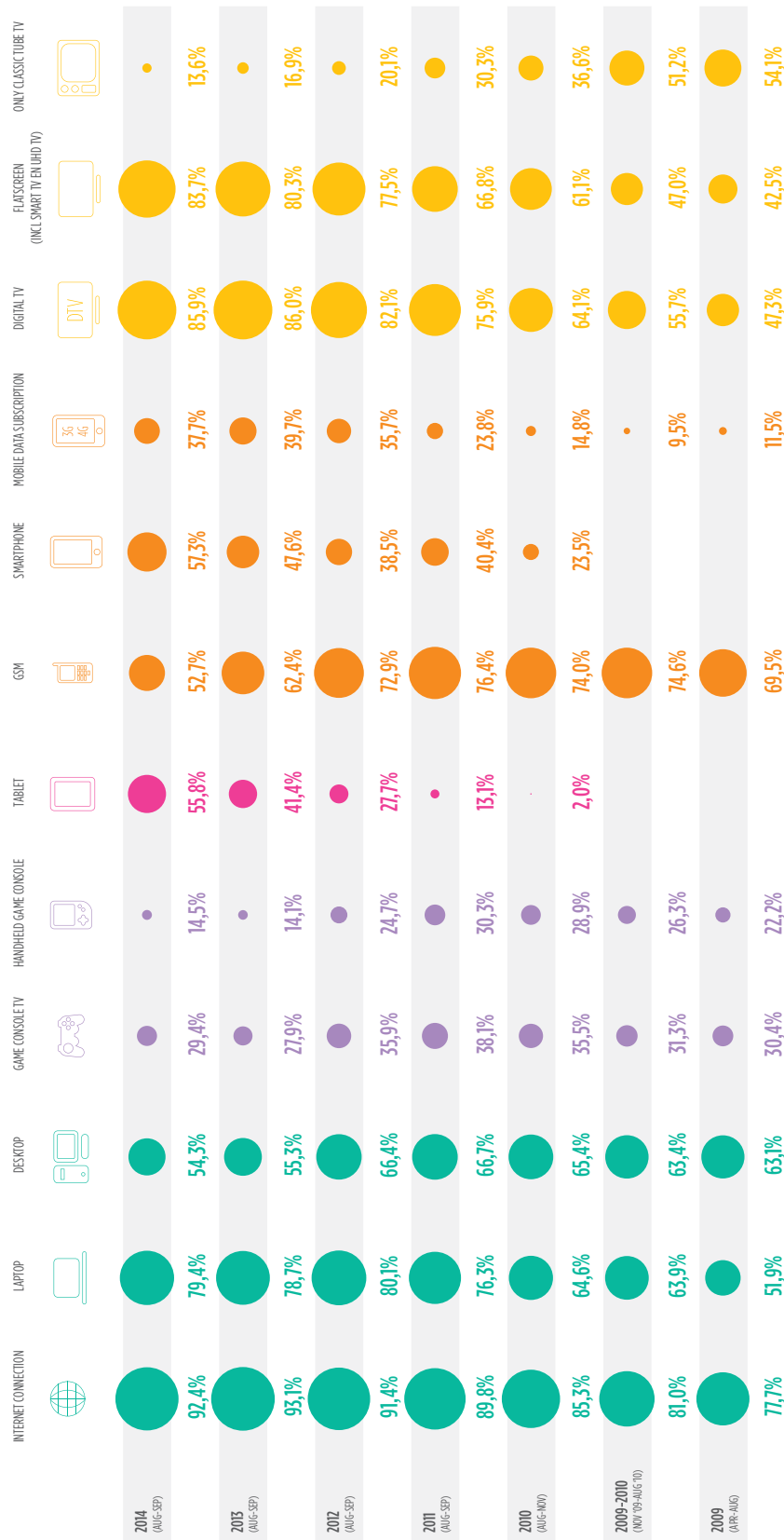
The adoption of tablets is still growing exponentially. Now 55,8% of the Flemish population has access to a tablet in their households. This shows an increase of 14,4 percentage points compared to last year.

Telephony remains widely available in Flanders: 99,6% have access to a fixed or mobile telephony connection. 68,4% of the Flemish population have a fixed telephone at home (-2,9)\*. Mobile telephony stagnates at 96,2%. However, there is a remarkable difference in the evolution of 'normal' mobile phones (GSM) versus smartphones: whereas the adoption of GSM has dropped almost 10 percentage points to 52,7%, the penetration of smartphones has risen at the same rate to 57,3%. It is the first time that adoption of smartphones surpasses the adoption of regular mobile phones.

Adoption of TV screens remains stable, at 97,3%. The adoption of flat screens is still rising: 83,7% (+3,4)\* now own a flat screen in their household. Only 13,6% (-3,3)\* only have a classic TV tube in their households.

The general results of Digimeter 2014 show that the adoption of most devices and technologies, except smartphones and tablets, are reaching a saturation point in Flanders. The absolute difference between this wave and the previous wave should be considered with caution, as the sampling quota of this wave have been reformed with the inclusion of education level, though the results show some emerging trends: with 9/10 having access to the internet and a computer in their households, 1/3 to a gaming console, and 86% having digital TV in their households, the adoption of these technologies seem to stagnate or only show a limited growth. The adoption of smartphones and the access to a tablet in the households are the exception with a significant growth.

## PROPORTION OF FLEMISH PEOPLE HAVING ACCESS TO THE FOLLOWING DEVICES IN THEIR HOUSEHOLD



Infographic 1: Media & ICT adoption in Flanders - 2009 to 2014 (%)

# FACTS

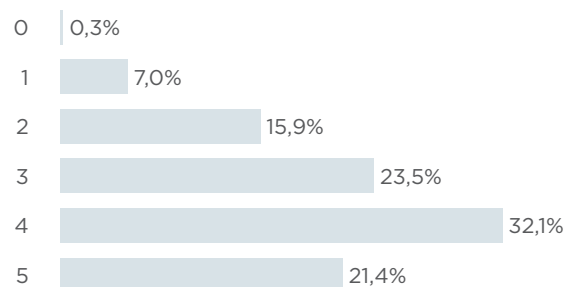
## MULTISCREEN

Having multiple screens in the household has become a reality for three quarters of the Flemish people in 2014: 76,9% have at least 3 screens at home, a significant step forward compared with last year (+7,3)\*.

- 23,5% have a triple screen household (-3,4)\*: they have access to 3 different types of screens at home.
  - Most common triple screen combination: TV, Laptop and Smartphone (7,1%)
  - Second most common triple screen combination: TV, Desktop and Laptop (6,4%)
  - Third most common triple screen combination: TV, Laptop and Tablet (5,6%)
  - Other triple screen combinations (4,4%)
- 32,1% have a quadruple screen household (+5,3)\*: they have four screens at home.
  - Most common quadruple screen combination: TV, Laptop, Tablet and Smartphone (14,8%)
  - Second most common quadruple screen combination: TV, Desktop, Laptop en Smartphone (7,1%)
  - Third most common quadruple screen combination: TV, Desktop, Laptop and Tablet (6,3%)
  - Other quadruple screen combinations (3,8%)
- 21,4% have a quintuple screen household (+5,5)\*: they have access to five types of screens at home: TV, desktop, laptop, smartphone and tablet.

FACTS

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



Graph 1: Multiscreen households: the number of screens (TV, desktop, laptop, smartphone or tablet) the respondents have access to in their household (N=2.028)

# TELEVISION

## DEVICES

- 97,3% own a TV set in their household.
- The classic TV tube is becoming a rarity in the Flemish households. 13,6% of the respondents reported that the only TV set in the household was a TV tube (-3,3)\*. Amongst the people aged 65 and older, the TV tube is the only TV set at home for over one out of three (34,6%).
- The drop in classic TV tubes has been compensated with a growth in adoption of flat screen TV sets. 83,7% have at least one type of flat screen TV at home (+3,4)\*, mainly a normal flat screen (73,2%).
- A striking fact is that in 2014 a quarter of the Flemings (26,1%) reports having a smart TV at home. This results in an increased use of internet functionalities via a television screen, as 13,9% engage in internet activities on their television screen (+5,1%).

## DIGITAL TELEVISION

- The adoption of digital TV subscriptions remains stable at 85,9% (-0,1)\*.
- Electronic Program Guide (EPG) (59,5%), Ad skipping (51,7%) and Recording a program or movie (37,7%) remain the most popular digital TV functionalities on a daily basis.
- The ability to skip ads remains a popular feature of digital television. However, the willingness to pay extra for this functionality is slightly lower than last year. Half of the respondents would rather drop this feature than to pay extra (50,5%), which is 4,6 percentage points higher than last year.
- One in ten Flemings has access to a paid subscription on a sports package, such as Belgacom 11. Almost one in eight has access to a movies or series video on demand service, such as Rex & Rio.

## WATCHING TV CONTENT

- 3,0% of the Flemish population never watches TV content on any device.
- More and more Flemings live in a multiscreen household. This multiscreen reality is translated in their viewing habits. 57,7% have already watched television content on a computer, 43,6% on a tablet, and 37,7% on a smartphone. Due to a modification in the exact formulation of the survey question, any comparisons of the 2013 versus the 2014 figures on this topic should be considered with caution, but nevertheless the advance of using tablets or smartphones to watch television is striking: in 2013 'only' 26,6% occasionally used a tablet to watch television content, and 18,4% used a smartphone.

- In other words, Flemings are fully exploring the possibilities of watching television content on different devices. Moreover, for a substantial amount of Flemings this has surpassed the level of experimenting, and has evolved to a daily routine: 14,8% state to watch television on a computer on a daily basis; for tablet and smartphone this is respectively 9,2% and 7,2%. Some of the Flemings use the alternative screens additionally to a regular television screen (cf. the Media Omnivores segment at the end of the report) while others (especially the younger Online Media Masters) use the alternative screens as a partial substitution of the television screen. However, in general, the television set remains the absolute point of reference for watching television content, since for 78,2% of the Flemings the television set is the daily gateway to television content.
- 46,0% of the Flemish population reports watching 1 to 3 hours of TV daily on a television set. 29,8% watch TV content at least once a week on a laptop, 19,7% on a tablet, and 15,0% on a smartphone.
- The frequency of viewing TV content on alternative devices is clearly an age-related phenomenon. Over half of the respondents aged 15 to 29 years old claims to watch TV content on a laptop/desktop on a weekly basis. 30% of the people aged 30-39 years old says that they watch TV content on a tablet at least once a week, whereas 40,3% of the 15-19 year olds watches TV content on their smartphone at least once a week.
- Watching television is becoming more and more a multiscreen activity, with 'the large television screen in the living room' still as a standard for the average Fleming. Due to the application of a self-administered questionnaire, Digimeter does not allow for drawing conclusions on the shares of the time spent on each of these devices, nor on the time spent watching live/linear programming versus timeshifted viewing. However, when we asked our respondents to what extent live/linear programming and timeshifted viewing are represented in their viewing behavior (regardless of the actual time spent and the device used), we can conclude that live television upholds its weight in the viewing habits of the Flemings. In fact, live viewing is even gaining ground (last year, 55,8% reported that they watch linear television programming every day, whereas this year, it has increased to 63,3%). This can be attributed to the increasing use of internet while watching television content, especially in online activities related to the television program they are watching (+13,7 percentage points). Moreover, 30,3% agree that messages on social network sites about programs can trigger them to actually watch that program (cf. the chapter regarding social media). 31,2% of the Flemings engage in timeshifted viewing as a daily habit.
- The way TV content is consumed is highly dependent on the age of the viewer. Watching live/linear TV remains popular within all age groups. Overall, 78,6% state to watch (at least once) live/linear tv on a weekly basis. However, it is striking to see that timeshifting equals or even tops live viewing among the two youngest age groups. Among the 15-19 year olds respectively 70,1% and 72,9% state to watch live and timeshifted per week. Among the 20-29 year olds, this makes up for 61%. Among the 65+ segment, linear television is by far the most common way to watch TV on a weekly basis (89,0%); less than half of the 65+ years old report watching in timeshifted mode (46,2%), and other types of viewing are rarely done on a weekly basis by the oldest age group (< 6%).

## USING THE INTERNET WHILE WATCHING TV CONTENT

- The usage of the internet while watching TV becomes more and more a common practice. 69,8% say that they have engaged in an online activity while watching TV at least once last month. Last year this was 53,8%. However, comparing both waves should be addressed with caution, as the formulation of the question has been modified. This wave, we asked if the respondents engaged in internet-related activities while watching TV 'during last month', whereas in the previous wave the timeframe was less specific as we asked if they 'occasionally' engaged in internet-activities while watching TV.
- There has been a remarkable shift in reasons to use the internet while watching TV. The most common practice at 61,0% is still to engage in actions not related to the program (such as checking e-mail, checking newsfeed on social media, consuming digital news, playing games,...), but this is remarkably lower than the 84,2% of last year. Program-related internet activities on the other hand have risen to 57,1% (coming from 43,4% last year)<sup>1</sup>. Especially looking for additional information or browsing to the website of the program are popular interactions with the program. The efforts of the broadcasters to stimulate multi-screen (inter)activity seem to pay off.
- Within the program-related activities, the largest increases for information-related activities are attributed to browsing on the program website (+23,3 percentage points)\* and looking for additional info/images/videos of the program (+20,4 percentage points). This year, a quarter of the Flemings indicate to have shared their opinions or engaged in online conversations about the program in the last month (+8,2)\*. Voting or playing along with the program are less frequently done (9,8%) (+1,2)\*.
- The most common device for using the internet while watching TV is the desktop or laptop. The use of mobile devices such as smartphones or tablets depends on the activity. Smartphones are more preferred for giving an opinion about the program, and for engaging in actions not related to the program (e.g. emails). Tablets, on the other hand, are preferred for searching for additional information or for surfing to the program website.
- Performing internet activities while watching TV is related to the age of the viewer: the younger the viewer, the more common the practice is. Nine out of ten people between 15 and 29 years old use internet while watching TV, whereas this is the case for only 36,5% of the people aged 65+.
- A quarter of the Flemings (24,9%) report having shared an opinion or having talked about the program via the internet (+8,2)\*. Facebook is by far the most frequently used channel to express opinions while watching the program (69,6%). The use of a program-specific second screen app is far less common (4,2%).

<sup>1</sup> The formulation of the question has changed compared to the previous wave. Last year we asked if the respondents 'occasionally' engaged in internet activities while watching television, whereas this year we made this more specific by asking if they have done this 'last month'. That way, we want to avoid different interpretations of the intended time frame. Also, an extra item has been added ("To look up information about a commercial I saw on TV"). This means that comparison between both waves on this topic should be addressed with caution.

# COMPUTER

- Having access to a computer (92,0%) and to the internet (92,4%) in the household has reached a saturation point in Flanders. The adoption of desktops (54,3%) and laptops (79,4%) is similar to the situation in the previous wave (resp. -1,0 and +0,7 percentage points).
- Most people who do not have a computer at this moment, never had one in their household. The main reasons for not having a computer, are lack of computer-related skills (45,1%) and lack of interest in computers (32,7%). The perception that computers are too expensive, is less often stated as a reason for not having a computer this wave (6,8%) compared to last year (13,3%). This indicates that the digital (computer) divide is becoming more and more an issue of skills, and less an issue of financial means.
- People not having a computer are generally older than 65 and retired, lower educated, single without children or widow(er)s, and tend to have lower incomes.
- Most people who don't have an internet connection at home at the moment, never had one in the past. Reasons for not having an internet connection at home, are similar to those for not having a computer. More often it is a case of lacking skills and interest in the internet, and less often of a cost-related issue. Moreover, privacy-issues are rarely reported as a reason for not having an internet connection (2,6%, - 1,5 percentage points compared to the previous wave). Similar to the profile of non-adopters of computers, it seems that people not having an internet connection in their household tend to be older than 65 and retired, lower educated, single without children or a widow(er), and with a lower net income.
- Most people use a computer on average 1-5 hours per day (41,7%). Almost a third of the population (31,2%) uses a computer more than 5 hours a day, and 17,6% report using a computer more than 8 hours a day. People using a computer more than 8 hours a day are most likely men between 20 and 49 years old, white-collar workers or higher management or self-employed, married or living together with children, and having a higher net income.
- Over eight in ten uses the computer on a daily basis. The most common daily activities are e-mail (77,6%), searching info (70,8%) and visiting social network sites (52,1%).
- More than half of Flemish music downloaders state that their music downloads are mainly or exclusively done on a legal basis (53,7%), which is slightly down from last year (-3,2)\*. Downloading movies or series is less likely to be done on a legal basis (38,1%) (-4,4)\*. Half of the downloaders state that they only or mainly download movies or series in an illegal manner (49,1%) (+3,1)\*, whereas this is the case for only one third of the music downloaders (33,9%) (+3,4)\*. In short, we see that music is mainly downloaded legally, whereas movies and series are more often downloaded on an illegal basis. However, both for music and for movies/series the proportion of people that claims to legally download content is decreasing, whereas the proportion of illegal downloaders is increasing.

# TABLET

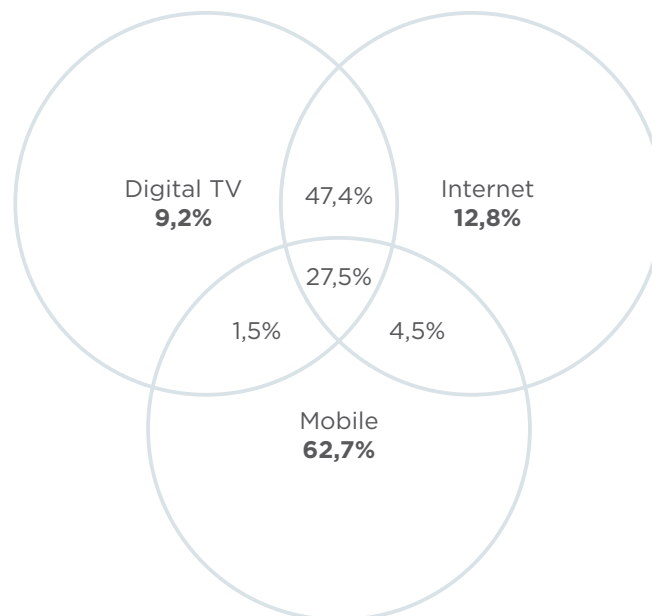
- The adoption of tablets keeps on growing. At this point, 55,8% of the Flemish population has access to at least one tablet in their household. Almost 8% of those having access to a tablet, report that they never use it themselves (in that case, the children are most likely to be the users of the tablet). As such, we can state that 51,5% of the Flemish population has access to at least one tablet in the household, and uses it her-/himself.
- 20,6% of the respondents report having access to multiple tablets, and 2,1% has more than 3 tablets in the household.
- Half of the tablets are iPads (Apple iOS). However, the share of iPads is dropping, as last year 53% of the tablets ran on iOS, and in 2012 this was even 66%. This decrease corresponds with the fact that global sales figures of iPads have decreased. 38,1% of the tablets run on Adroid. Windows tablets have almost doubled their share, from 4,4% in 2013 to 8,5% this year.
- The segment of tablet adopters is slightly more male compared to the total Flemish population, and 65% of tablet owners is younger than 50. Furthermore, tablet adoption is higher among the higher educated, who are either white-collar workers or C-level managers, married or living together with children, and coming from larger family sizes.
- The purchase intention for tablet remains high: 29,0% of the population is considering to buy one in the following 12 months (6,8% is convinced to buy one, 22,2% is still in doubt). The total intention (including those who doubt) is slightly higher for those who don't have a tablet yet (32,4%) than for those who already own one (26,2%). If a significant group of those still in doubt becomes convinced to buy one, then tablet adoption will still be on the rise next year.
- Most people owning a tablet, spend on average 1 to 3 hours a day on a tablet. 8,7% are heavy users of tablets, and spends at least 3 hours a day on their tablet.
- Although tablets can be connected to the internet in various ways, the most common type of internet connection for tablets is the WiFi-network at home or elsewhere (89,1%). 15,4% have a mobile internet connection for their tablet using a SIM card (via subscription or via prepaid card), which is approximately the same as last year (+0,2)\*.
- Emailing (reading 52,1% and sending 38,7%), searching for info (46,3%) visiting social media (40,1%) and reading news sites (37,4%) are the most popular daily activities on a tablet.
- 55,0% of the tablet users has paid for apps in the last 12 months. People paying for tablet apps are most likely males between 30 and 50 years, white-collar workers or C-level managers with higher education and higher income, and living together with their partner and children.

# TELEPHONY

- Fixed telephony has decreased 2,9 percentage points compared to last year, but is still available in the households of almost seven in ten Flemings.
- Mobile phones have saturated at 96,2%, but we see a remarkable difference between smartphones and regular GSM's. Whereas smartphone adoption has risen 9,7 percentage points to 57,3%, the adoption of GSM's has dropped at the same rate to 52,7%. As such, the adoption of smartphones has surpassed the adoption of GSM's for the first time.
- GSM owners tend to be more skewed towards retired women of 65 and older, lower educated and with lower incomes. Smartphone owners are more likely to be men younger than 50, and higher educated. Furthermore they are either white-collar workers/C-level managers, living together and having children, or are students living with both their parents and having no income of their own.
- Android remains the most popular smartphone operating system (53,2%), with iOS in second place (31,1%). Less than 1% reports that their main smartphone is Blackberry (-3,4)\*; the share of Windows phone keeps on growing (+1,8)\*.
- More than half of the smartphone owners use their smartphone for reading emails (65,0%) and checking social media (56,6%) on a daily basis.
- Most smartphone owners still rely on mobile network subscriptions to make phone calls. Only 1 in 5 makes phone calls via web-based apps (eg., Skype, Facetime) on a monthly basis. Messaging is also largely via classic SMS: 70,1% report sending text messages via SMS every day, whereas 46,4% send messages via a web-based messaging app on a daily basis.
- Paying for apps during the last 12 months (buying app, in-app purchases or buying media-content) happened remarkably less often for smartphones (36,6%) than for tablets (55,0%).

# SERVICES

- 78,9% have access to digital television, internet connection and a mobile subscription (pre- or postpaid) at home. 27,5% have those three services as a package from the same operator.
- Digital television is available for 85,9% of the Flemish population. Most commonly this is bundled by the same provider in a package with an internet connection (47,4%). Only 9,2% have a stand-alone digital television subscription with a provider.
- Over nine in ten people (92,4%) have an internet connection at home. For 47,4%, this is bundled together with a subscription for digital television by the same provider. 1 in 8 (12,8%) has an internet connection that is not part of a package.
- 96,2% have a mobile subscription, most commonly not included in a package (62,7%). If they do have a mobile subscription as part of a package at the same provider, it is most commonly in combination with both digital television and an internet connection.



## SOCIAL MEDIA

- The number of Flemish people with an account on a social media site is still rising: 78,7% have a subscription on at least one social media site (+2,0)\*. Facebook (70,9%), YouTube (39,3%) and Google+ (39,1%) remain the top-3 social network sites.
- Having an account doesn't necessarily mean the same as using it often. While 78,7% have an account on at least one social media site, only 75,7% of the population have logged in on a social network site in the last month.
- Those with Facebook accounts seem to be the most active users. 95,6% of those with a Facebook account logged in during the last month.
- Facebook has the highest usage frequency: 39,9% of the people with a Facebook account use it at least one hour a day; for Twitter (11,8%), LinkedIn (1,9%) and Google+ (6,7%) this is far less.

## GAMES

- 62,4% have played at least one game in the last month (+1,0)\*. The most popular devices to play games are computers (37,0%), tablets (31,3%) and mobile phones (30,4%).
- After years of a decreasing trend, the adoption of game consoles has stabilised to 32,5% (+1,7)\*. Almost 3 out of 10 people report having a fixed console (connected to the TV screen), whereas 14,5% have a handheld gameconsole.
- Age is an important determinant for the segment of gamers (48,9% of the gamers is younger than 40, whereas this is only true for 14,5% of the non-gamers).
- Almost half of those who play games, play less than daily.

# TRADITIONAL MEDIA

## RADIO

- 81,0% indicate that they listen to the radio on a daily basis (via any kind of device).
- Over half of the Flemish people reports listening to the radio in their car or at home on a daily basis.

## MUSIC

- 56,3% report that they consumed online music in the last month (-3,2)\*<sup>1</sup>. Men and people in younger age categories are more likely to use online music channels.
- YouTube is by far the most popular online source for music (41,7%).
- Less than 1 in 4 (22,6%) reports paying for online music via the suggested music channels (either buying music or having a paid subscription). If people pay for online music, it is most likely via iTunes (17,5% of the population).

## NEWS

- News consumption habits seem to uphold compared to last year. Reading a newspaper, for instance, is still a daily habit for 37,4% of the respondents (-1,3)\*. However, we do see a significant increase in the use of mobile devices, such as tablets (+8,8)\* and smartphones (+7,6)\*, to consume news.
- Radio (65,8%), national television (60,1%) and the computer (40,8%) are the sources most commonly used on a daily basis to consume news. If we look into detail at the digital news sources, visiting news sites is most popular (74,2% have visited a news website in the last month), mainly by means of a computer.
- Except for newspapers and regional TV news, the sources people use to consume news vary with age. Furthermore, reading newspapers does not differ significantly between men and women. The other sources (such as tablet, mobile phone, computer, TV and radio) are more likely to be used by men than by women.

<sup>1</sup>The formulation of the question has been changed compared to the previous wave. Last year we asked if the respondents consumed online music 'from time to time', whereas this year we made this more specific by asking if they have done this 'last month'. That way, we want to avoid different interpretations of the intended time frame. However, this means that comparison between both waves on this topic should be addressed with caution.

# GENERAL MEDIA USE

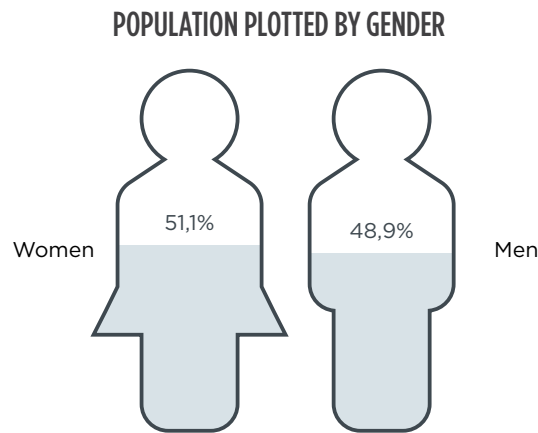
- When asked to make a choice on which media device they would most likely buy in the near future, most people answer they would prefer to buy a laptop (33,1%) or a tablet (28,6%). 14,2% have no preference. However, when looking at the age groups, there is a remarkable difference. Laptops and smartphones are more preferred by the younger age groups, while tablets have the highest preference amongst 30-59 year olds.
- Most people still use physical drives to store data. 73,1% have used their devices' hard drives, and 55,7% have used external devices (eg., USB-stick, external hard disk). Additionally, Dropbox is the most commonly used cloud storage application.
- For most internet-related tasks, computers (laptop or desktop) remain the most commonly used devices on a daily basis. However, when it comes to playing games and social networking, mobile devices are preferred (respectively tablets and smartphones).

# SOCIO-DEMOGRAPHIC

The analysis in this report is based on a representative sample of the Flemish population. During the fieldwork, quota were set on age, gender, education level and region. After data cleaning, the final dataset was again weighted on the first three variables (age, gender and education level).

## GENDER

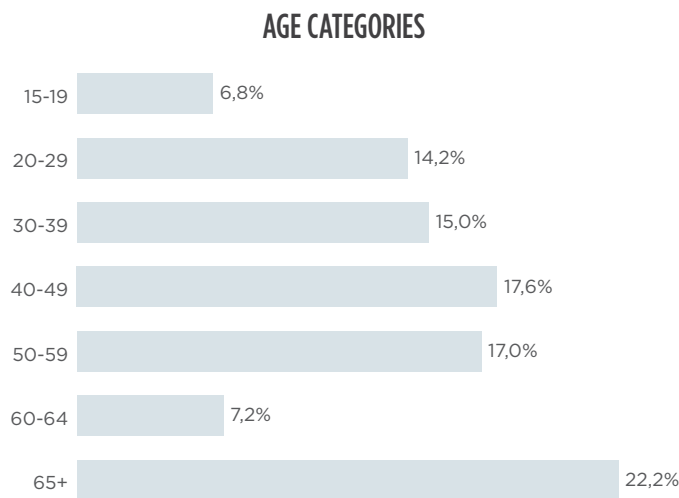
Our sample consists of slightly more women (51,1%) than men (48,9%).



Graph 2: Population plotted by gender (N=2.028)

## AGE CATEGORIES

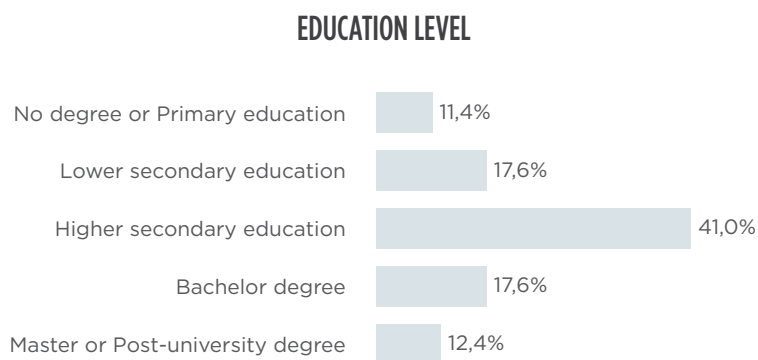
The minimum age to participate in the survey is 15 years old; there is no maximum age limit.



Graph 3: Population plotted by age categories (N=2.028)

## EDUCATION LEVEL

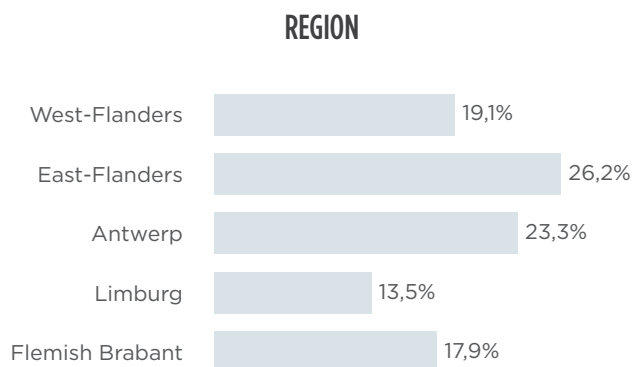
The vast majority of the population (41,0%) has completed secondary education. 30% have a higher degree (Bachelor, Master or post-university), whereas 11,4% only completed primary education or no degree at all.



Graph 4: Population plotted by education level (N=2.028)

## REGION

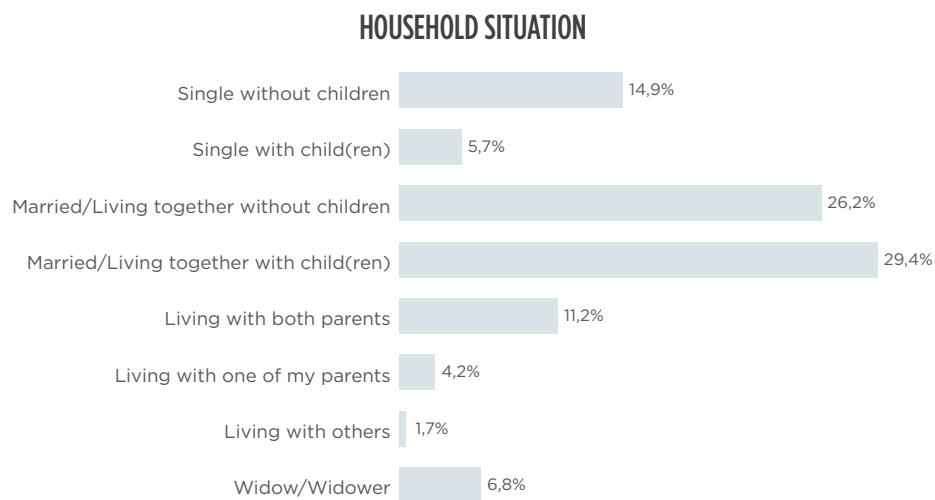
During the data collection, quota were set on region to make sure that a sample representative for the whole of Flanders is guaranteed. However, as we do not hold any hypothesis on the effect of region on the adoption of media and ICT, region was not taken into account when weighing the final dataset.



Graph 5: Population plotted by region (N=2.028)

## HOUSEHOLD SITUATION

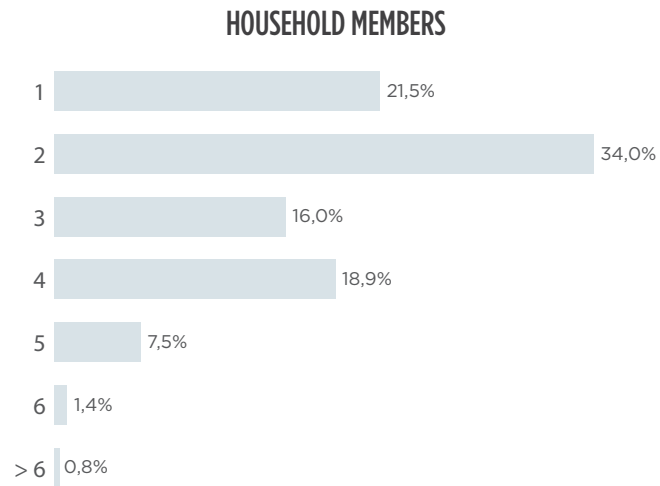
Over half of our sample are married or are living together (26,2% without children, 29,4% with children). The third largest group in the sample are the single individuals without children (14,9%).



Graph 6: Population plotted by household situation (N=2.028)

## HOUSEHOLD MEMBERS

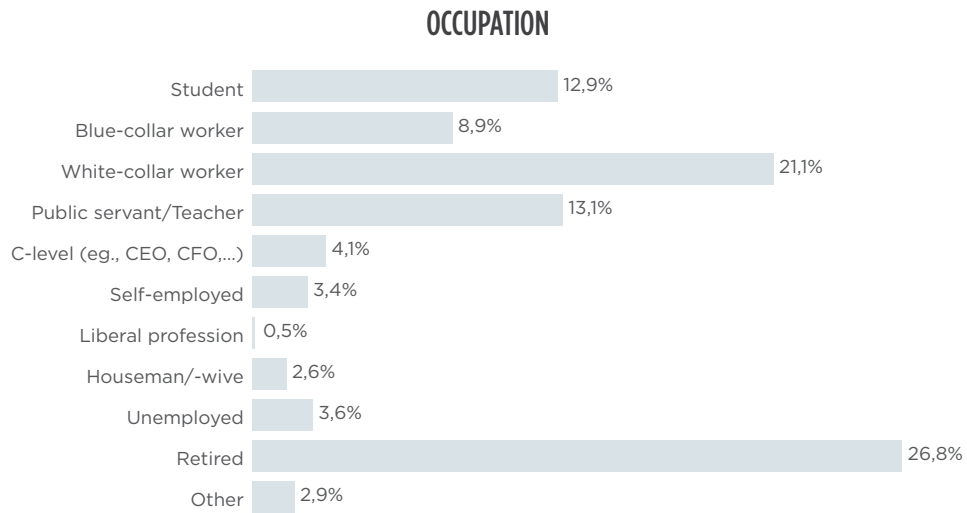
Most households in our sample consist of 2 people (34%). 21,5% live on their own, whereas 28,6% are living in households of at least 4 persons.



Graph 7: Population plotted by number of household members (N=2.028)

## OCCUPATION

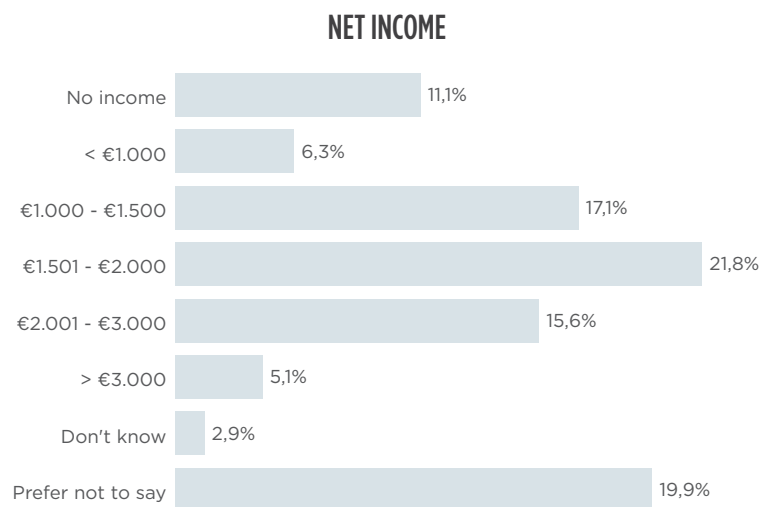
Almost half of the sample are either retired (26,8%) or white-collar workers (21,1%). 12,9% are still students.



Graph 8: Population plotted by occupation (N=2.028)

## NET INCOME

Net income is normally distributed, with the majority (54,5%) having an income between €1.000 and €3.000. 6,3% earns less than €1.000, whereas 5,1% have a net income exceeding €3.000. Reflecting the students and stay-at-home parents in our sample, 11,1% report not having net incomes. Over one out of five in our sample do not know (2,9%) or prefer not to say (19,9%) their net incomes.



Graph 9: Population plotted by net income (N=2.028)





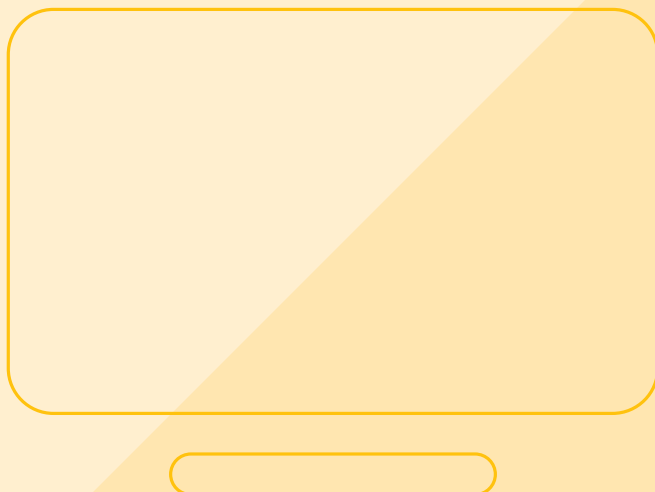
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# CHAPTER 01

TELEVISION

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TV



CHAPTER 01





# GENERAL FACTS & FIGURES (N=2.028)

**97,3%**

own a TV set in their household

**13,6%**

Only classic tube TV

**61,8%**

Only flat screen TV

**21,9%**

Both

83,7% own at least one type of flat screen in their household <sup>1</sup>

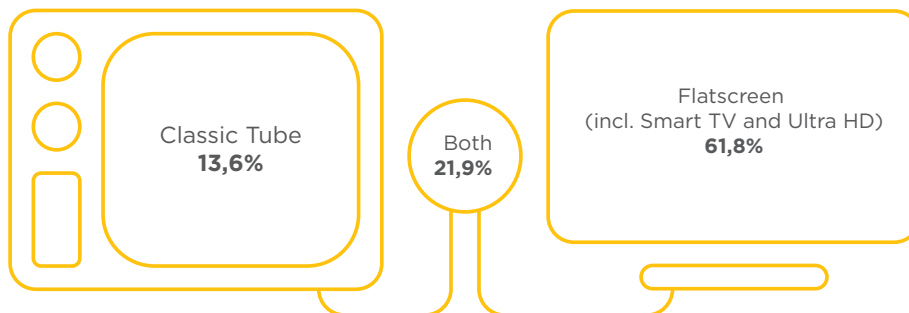
- 73,2% own a normal flat screen TV set
- 26,1% own a Smart TV
- 3,7% own a Ultra HD-screen
- 1,5% own all three types of flat screen in their household

## CLASSIC TUBE TV VS FLAT SCREEN TV

People only having access to a classic tube TV in their household, are becoming more and more rare (13,6%). Last year this was still 16,9%. Especially people in the older age categories still rely on the classic tube TV (43,0% of the people who only have a classic tube TV as TV set, is 60 years and older).

## CLASSIC TUBE TV VS FLAT SCREEN TV

Total adoption TV Screens: **97,3%**



Graph 10: TV equipment: Classic tube TV vs Flat screen (N=2.028)

<sup>1</sup>The results are self-reported. As such, they reflect the perception of the respondents regarding the available screens in their households.

## CLASSIC TUBE TV AS MAIN SCREEN PLOTTED BY AGE

	15-19	20-29	30-39	40-49	50-59	60-64	65+
<b>ONLY CLASSIC TUBE TV</b>	3,8%	8,0%	15,2%	15,0%	15,1%	8,4%	34,6%

Table 1: Breakdown by Age for Having a Classic Tube TV as their Single Television Set (Having No Flat screen Television in their Household) (N= 276)

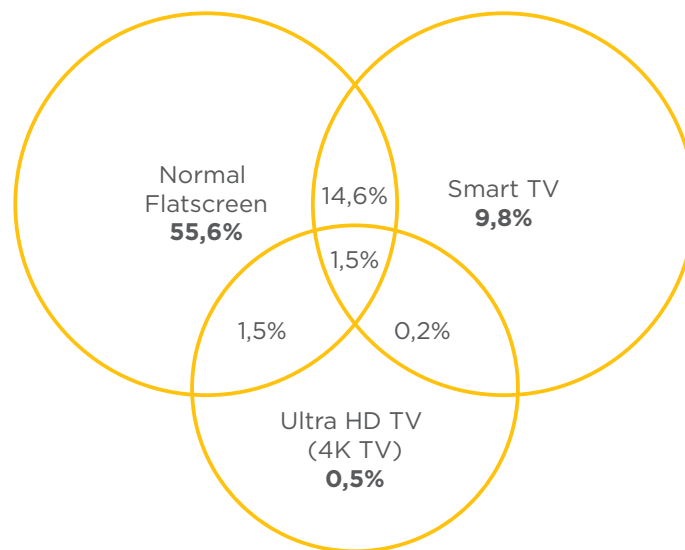
## TYPES OF FLAT SCREEN

83,7% have at least one type of flat screen TV in their households. The normal flat screen is still mostly common (73,2%), while 26,1% states to own a smart TV already. Ultra HD TV is still widely unknown, with only 3,7% stating owning one in their household.

Smart TV tends to be popular among the younger age groups, in households with 3 to 4 members, and with a higher income<sup>2</sup>.

## TYPES OF FLATSCREENS

Total adoption TV Screens: **83,7%**



Graph 11: TV equipment: Types of Flat screen (N=2.028)

<sup>2</sup> Apart from the likelihood that the adoption of smart TV is overrated in this sample due to self-administration, it is interesting to note which profiles state having a smart TV.

## PROFILING SMART TV

	SMART TV (N=528) (26,1%)	NO SMART TV (N=1.500) (73,9%)	TOTAL (N=2.028) (100,0%)
<b>Gender</b>			
Men	62,1%	44,3%	48,9%
Women	37,9%	55,7%	51,1%
<b>Age</b>			
15-19	8,9%	6,0%	6,8%
20-29	16,4%	13,4%	14,2%
30-39	16,7%	14,4%	15,0%
40-49	22,0%	16,1%	17,6%
50-59	16,7%	17,1%	17,0%
60-64	4,1%	8,2%	7,2%
65+	15,0%	24,8%	22,2%
<b>Degree</b>			
No degree or Primary education	8,3%	12,5%	11,4%
Lower secondary education	13,4%	19,1%	17,6%
Higher Secondary Education	45,0%	39,6%	41,0%
Bachelor Degree	19,1%	17,0%	17,6%
Master Or Post-University Degree	14,1%	11,8%	12,4%
<b>Household Situation</b>			
Single Without Children	12,7%	15,7%	14,9%
Single With Child(Ren)	3,4%	6,5%	5,7%
Married/Living Together Without Children	28,2%	25,4%	26,2%
Married/Living Together With Child(Ren)	34,5%	27,7%	29,4%
Living With Both Parents	13,3%	10,4%	11,2%
Living With One Of My Parents	3,9%	4,3%	4,2%
Living With Others	1,0%	1,9%	1,7%
Widow/Widower	3,0%	8,1%	6,8%
<b>Household members</b>			
1	13,9%	24,1%	21,5%
2	33,2%	34,1%	34,0%
3	19,9%	14,5%	16,0%
4	23,7%	17,2%	18,9%
5	6,7%	7,8%	7,5%
6	1,8%	1,2%	1,4%
> 6	0,7%	0,9%	0,8%

	<b>SMART TV</b>	<b>NO SMART TV</b>	<b>TOTAL</b>
	(N=528) (26,1%)	(N=1.500) (73,9%)	(N=2.028) (100,0%)
<b>Occupation</b>			
Student	14,5%	12,3%	<b>12,9%</b>
Blue-collar worker	7,8%	9,3%	<b>8,9%</b>
White-collar worker	26,2%	19,3%	<b>21,1%</b>
Public servant/Teacher	12,1%	13,4%	<b>13,1%</b>
C-level (eg., CEO, CFO,...)	7,0%	3,1%	<b>4,1%</b>
Self-employed	4,8%	2,9%	<b>3,4%</b>
Liberal profession	0,3%	0,6%	<b>0,5%</b>
Houseman/-wive	1,8%	2,9%	<b>2,6%</b>
Unemployed	2,2%	4,1%	<b>3,6%</b>
Retired	20,3%	29,1%	<b>26,8%</b>
Other	3,0%	2,9%	<b>2,9%</b>
<b>Net income</b>			
No income	10,9%	11,2%	<b>11,1%</b>
< €1.000	4,7%	6,9%	<b>6,3%</b>
€1.000 - €1.500	14,8%	17,9%	<b>17,1%</b>
€1.501 - €2.000	24,4%	20,9%	<b>21,8%</b>
€2.001 - €3.000	19,3%	14,4%	<b>15,6%</b>
> €3.000	6,8%	4,6%	<b>5,1%</b>
Don't know	2,5%	3,1%	<b>2,9%</b>
Prefer not to say	16,7%	20,8%	<b>19,9%</b>

Table 2: Profiling of Smart TV adopters versus non-adopters (N=2.028)

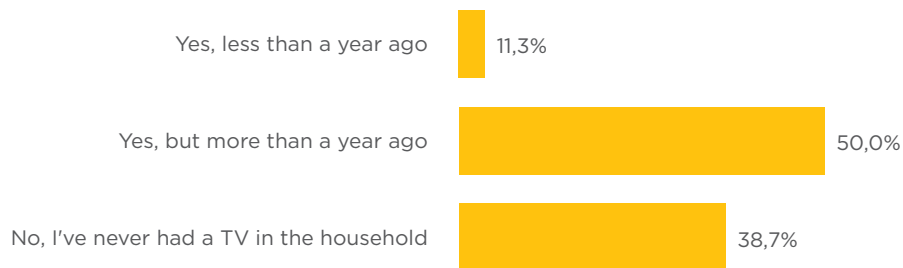
## NOT HAVING TV AT HOME

2,7% do not have a television set at home. Half of the respondents who reported not having a TV in their household, had a TV set more than a year ago. Four in ten claimed that they never had a TV set at home. <sup>2</sup>

The main reason for not having a TV at home is due to a lack of interest or need to watch TV (56,2%). One in five has another device to watch TV content, mainly a laptop. <sup>2</sup>

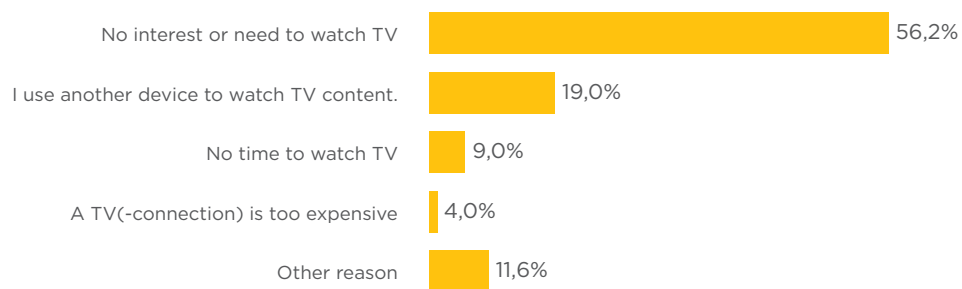
Two age groups are more susceptible for not having a TV at home: 20-39 year olds (having other devices to watch TV content), and 65+ (mainly lack of interest). <sup>2</sup>

### DID YOU USE TO HAVE A TV SET AT HOME?



Graph 12: Did you use to have a TV set at home (on people not having a TV set at home, N=55)

### REASONS FOR NOT HAVING TV AT HOME



Graph 13: Main reasons for not having a TV set at home (on people not having a TV set at home, N=55)

<sup>2</sup> Due to low sample size (N=55), the results should be considered with caution.

## BREAKDOWN BY AGE FOR NOT HAVING A TV SET<sup>2</sup>

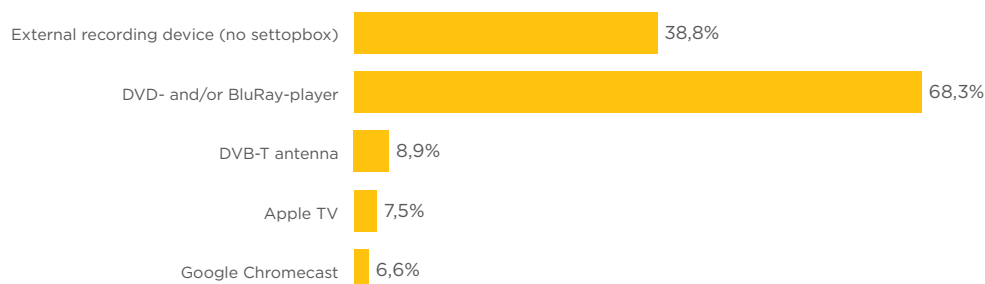
	15-19	20-29	30-39	40-49	50-59	60-64	65+
No TV set at home (N=55)	0,0%	23,6%	20,0%	9,1%	9,1%	7,3%	30,9%
TV set at home (N=1.973)	6,9%	13,9%	14,9%	17,9%	17,2%	7,2%	22,0%

Table 3: Not having a TV set, plotted by age (N=55)

## OTHER DEVICES

While new devices to stream TV content like Apple TV and Google Chromecast are emerging, classic devices like a DVD/BluRay-player or an external recording device are still far more common.

### TV EQUIPMENT: OTHER DEVICES



Graph 14: TV equipment: Other devices (N=2.028)

## PROFILING OF ADOPTERS OF APPLE TV AND GOOGLE CHROMECAST

People having access to media streaming devices (devices to connect your TV to the internet, and to stream internet videos on your TV) in their households are most likely men from younger age groups.

The rather high adoption rates are partly due to the fact that those streaming devices are mainly adopted by larger households. In the total sample, 28,6% live in a household of at least four members. For those who own an Apple TV, 37,5% of them come from a household of at least four members. For Google Chromecast owners, this is 35,0%. Keep in mind that Digimeter reports the number of people having access to technology and media (being potential users of those technologies and media), and does not make any claims on a household level or on a personal ownership level (not shared with anyone else), nor does it make any claims about the actual number of devices sold/used in Flanders. As the streaming devices are mainly available in larger households (with more potential users), the results of Digimeter are bound to be higher than any other reports on a household level, on personal possession, or sales figures of the streaming devices.

<sup>2</sup> Due to low sample size (N=55), the results should be considered with caution.

Customers of Telenet Digital TV are most likely to have access to a media streaming device such as Apple TV and Google Chromecast.

	<b>APPLE TV</b> (N=152) (7,5%)	<b>GOOGLE CHROME-CAST</b> (N=134) (6,6%)	<b>TOTAL</b> (N=2.028) (5,3%)
<b>Gender</b>			
Men	67,5%	63,2%	48,9%
Women	32,5%	36,8%	51,1%
<b>AGE</b>			
15-19	11,4%	16,0%	6,8%
20-29	16,5%	23,2%	14,2%
30-39	17,4%	12,4%	15,0%
40-49	21,7%	15,0%	17,6%
50-59	13,7%	16,6%	17,0%
60-64	4,4%	3,2%	7,2%
65+	14,9%	13,6%	22,2%
<b>Occupation</b>			
Student	16,8%	24,7%	12,9%
Blue-Collar Worker	7,7%	11,5%	8,9%
White-Collar Worker	20,2%	19,1%	21,1%
Public Servant/Teacher	15,8%	5,8%	13,1%
C-Level (Eg., Ceo, Cfo,...)	10,4%	2,7%	4,1%
Self-Employed	6,1%	3,7%	3,4%
Liberal Profession	0,2%	0,7%	0,5%
Houseman/-Wife	2,4%	5,5%	2,6%
Unemployed	3,4%	2,6%	3,6%
Retired	15,2%	18,7%	26,8%
Other	1,9%	5,0%	2,9%
<b>Degree</b>			
No Degree Or Primary Education	8,0%	10,9%	11,4%
Lower Secondary Education	16,2%	24,9%	17,6%
Higher Secondary Education	38,2%	38,2%	41,0%
Bachelor Degree	17,0%	15,2%	17,6%
Master Or Post-University Degree	20,7%	10,9%	12,4%

TV

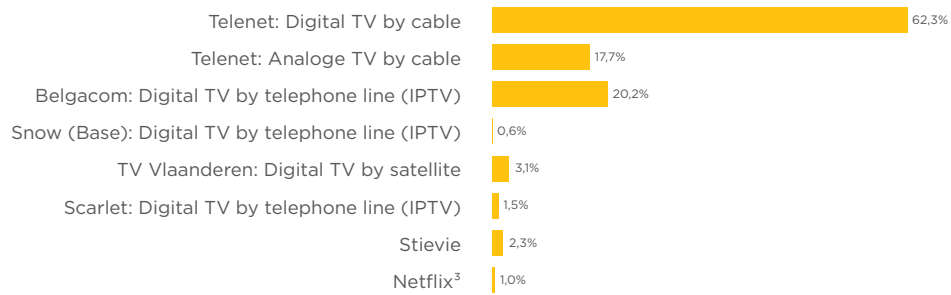
	APPLE TV (N=152) (7,5%)	GOOGLE CHROME- CAST (N=134) (6,6%)	TOTAL (N=2.028) (5,3%)
<b>Household Situation</b>			
Single Without Children	12,8%	15,4%	<b>14,9%</b>
Single With Child(Ren)	6,6%	9,7%	<b>5,7%</b>
Married/Living Together Without Children	17,0%	26,8%	<b>26,2%</b>
Married/Living Together With Child(Ren)	40,7%	20,7%	<b>29,4%</b>
Living With Both Parents	14,9%	15,7%	<b>11,2%</b>
Living With One Of My Parents	3,5%	5,6%	<b>4,2%</b>
Living With Others	1,4%	3,0%	<b>1,7%</b>
Widow/Widower	3,1%	3,0%	<b>6,8%</b>
<b>Household Members</b>			
1	15,7%	13,9%	<b>21,4%</b>
2	28,5%	31,8%	<b>33,9%</b>
3	18,4%	19,3%	<b>15,9%</b>
4	25,5%	27,2%	<b>18,9%</b>
5	7,4%	5,6%	<b>7,5%</b>
6	1,6%	1,7%	<b>1,4%</b>
> 6	3,0%	0,5%	<b>0,8%</b>
<b>Net Income</b>			
No Income	14,1%	17,6%	<b>11,1%</b>
< €1.000	3,8%	8,5%	<b>6,3%</b>
€1.000 - €1.500	17,5%	20,3%	<b>17,1%</b>
€1.501 - €2.000	14,4%	13,0%	<b>21,8%</b>
€2.001 - €3.000	18,7%	15,1%	<b>15,6%</b>
> €3.000	9,0%	6,8%	<b>5,1%</b>
Don't Know	3,0%	5,3%	<b>2,9%</b>
Prefer Not To Say	19,5%	13,5%	<b>19,7%</b>
<b>Digital Tv</b>			
Telenet	72,5%	73,5%	<b>62,3%</b>
Belgacom	12,9%	15,3%	<b>20,2%</b>
No Digital Tv	10,7%	7,3%	<b>14,1%</b>

Table 4: Profiling of adopters of Apple TV, Google Chromecast and Bhaalu (N=2.028)

## TV CONNECTIONS

- The adoption of a digital TV subscription remains stable at 85,9%<sup>2</sup> (-0,1)\*.
- The majority (62,3%) has a digital TV subscription by cable via Telenet.
- 17,7% still own an analogue TV connection.
- Six months after the launch, 2,3% of the Flemish population have access to a Stieve-account. This includes both paying and free (trial) users. Keep also in mind that this does not mean that 2,3% of the households have a Stieve account, as Digimeter does not report findings on a household level.

### TV CONNECTIONS



Graph 15: TV connections (N=2.028)

TV

<sup>2</sup> A small number of the population (1,9%) has more than one digital subscription, which explains why 62,3% + 20,2% + 0,6% + 3,1% + 1,5% does not equal 85,9%.

<sup>3</sup> Survey was taken before launch of Netflix in Belgium.

This percentage thus shows the number of people who were streaming Netflix from an international account (eg., by installing a VPN-connection towards a country where Netflix was already available).

## USE OF DIGITAL TELEVISION FUNCTIONALITIES

- The most popular digital TV functionalities used on a daily basis remain the same as last year: Electronic Program Guide (EPG) (59,5%) (+0,2)\*, Ad skipping (51,7%) (+1,8)\* and Recording a program or movie (37,7%) (-1,6)\*.
- The use of Internet on digital TV on a daily basis has risen from 8,8% last year to 13,9% this year (+5,1)\*. This is largely accounted for by the adoption of smart TV's and media streaming devices such as Apple TV and Google Chromecast: Internet-functionalities are more used on a daily basis by people having access to a smart TV (17,5%) or a streaming device (23,0%).
- Watching a paid preview, retrieving a paying program (pay-per-view) and voting/playing in the framework of a TV program are digital TV functionalities that are still less frequently used.
- The ability to skip ads remains a popular feature of digital television (51,7% reports skipping ads on a daily basis<sup>1</sup>). However, the willingness to pay extra for this functionality is slightly lower than last year. Only 28,3% explicitly state their willingness to pay extra for ad skipping possibilities (which is a decrease of 5,2 percentage points compared to 2013). Half of the respondents would rather drop this feature than to pay extra (50,5%), which is 4,6 percentage points higher than last year.
- Almost one in four people in Flanders has access to an extra paying subscription to consume TV content. Most popular are services for films/series on demand (12,0%) and sports packages (10,6%).

TV

### THE USE OF DIFFERENT FUNCTIONALITIES ON DIGITAL TELEVISION

	EVER	MONTHLY	DAILY
EPG	91,0%	81,1%	<b>59,5%</b>
Ad skipping	84,0%	73,7%	<b>51,7%</b>
Recording program or movie	87,7%	81,6%	<b>37,7%</b>
Internet	35,9%	18,6%	<b>13,9%</b>
Digital radio channel	61,2%	29,4%	<b>8,8%</b>
Reminder	57,6%	25,7%	<b>8,4%</b>
Watching content in a paid subscription	32,0%	15,4%	<b>5,2%</b>
Retrieve free program	63,7%	27,0%	<b>4,3%</b>
Watching pay channel	18,5%	8,4%	<b>3,5%</b>
VOD	53,8%	19,3%	<b>2,3%</b>
Voting/Playing with program (eg., red button)	25,8%	2,9%	<b>0,9%</b>
Retrieve paying program (pay-per-view)	39,2%	7,6%	<b>0,3%</b>
Watching pay preview	13,3%	1,5%	<b>0,2%</b>

Table 5: The use of different functionalities on digital TV (on people having access to Digital TV in their household, N=1.743)

<sup>1</sup> However, this does not mean that 51,7% of the ads are skipped on a daily basis! Digimeter only reports that 51,7% of the Flemings have the perception that they skip at least one commercial on a daily basis.

## WILLINGNESS TO PAY FOR AD SKIPPING

If you would have to pay to skip ads, which option would you prefer?	2014	2013
Current price without ability to skip ads	50,5%	45,9%
Stop digital TV subscription	21,1%	20,6%
At extra cost with the ability to skip ads	15,6%	18,3%
At a smaller extra cost with limited ability to skip ads	12,7%	15,2%

Table 6: The willingness to pay for ad skipping (on people having access to Digital TV in their household, N=1.743)

## EXTRA PAYING SUBSCRIPTIONS FOR TV CONTENT

	2014
Films/series on demand (eg., Rex & Rio by Telenet)	12,0%
Sports package (eg., Belgacom 11)	10,6%
Package of paychannels	6,1%
Other	1,6%
None of these	74,7%

Table 7: Extra paying subscriptions for TV content (on people having access to Digital TV in their household, N=1.743)

## WATCHING TV CONTENT

- 3,0% of the Flemish population never watches TV content on any device.
- More and more Flemings live in a multiscreen household. This multiscreen reality is translated in their viewing habits. 57,7% have already watched television content on a computer, 43,6% on a tablet, and 37,7% on a smartphone.
- In other words, Flemings are fully exploring the possibilities of watching television content on different devices. Moreover, for a substantial amount of Flemings this has surpassed the level of experimenting, and has evolved to a daily routine: 14,8% state to watch television on a computer on a daily basis; for tablet and smartphone this is respectively 9,2% and 7,2%. For a part of the Flemings the use of alternative screens comes on top of the television consumption on a regular television screen (cf. the Media Omnivores segment at the end of the report). For another part of the population (especially the younger Online Media Masters) the use of alternative screens seems to be a partial substitution of the television screen. However, in general, the television set remains the absolute point of reference for watching television content, since for 78,2% of the Flemings the television set is the daily gateway to television content.

- 46,0% reports watching 1-3 hours of TV on a television set every day.
- 29,8% watch TV content at least once a week on a laptop, 19,7% on a tablet, and 15,0% on a smartphone.
- There is a clear relationship between the frequency of watching TV content on other devices and the age of the respondents. Over half of the respondents aged 15 to 29 report watching TV content on a laptop/desktop on a weekly basis. 30% of the people aged 30-39 years old said that they watched TV content on a tablet at least once a week, whereas 40% of the 15-19 year olds watch TV content on their smartphone at least once a week.
- Watching television is becoming more and more a multiscreen activity, with 'the large television screen in the living room' still as a standard for the average Fleming. Due to the application of a self-administered questionnaire, Digimeter does not allow for drawing conclusions on the shares of the time spent on each of these devices, nor on the time spent watching live/linear programming versus timeshifted viewing. However, when we asked our respondents to what extent live/linear programming and timeshifted viewing are represented in their viewing behavior (regardless of the actual time spent and the device used), we can conclude that live television upholds its weight in the viewing habits of the Flemings. In fact, live viewing is even gaining ground (last year, 55,8% reported that they watch linear television programming every day, whereas this year, it has increased to 63,3%). This can be attributed to the increasing use of internet while watching television content, especially in online activities related to the television program they are watching (+13,7 percentage points). Moreover, 30,3% agree that messages on social network sites about programs can trigger them to actually watch that program (cf. the chapter regarding social media). 31,2% of the Flemings engage in timeshifted viewing as a daily habit.
- The way TV content is consumed is highly dependent on the age of the viewer. Watching live/linear TV remains popular within all age groups. Overall, 78,6% state to watch (at least once) live/linear tv on a weekly basis. However, it is striking to see that timeshifting equals or even tops live viewing among the two youngest age groups. Among the 15-19 year olds respectively 70,1% and 72,9% state to watch live and timeshifted per week. Among the 20-29 year olds, this makes up for 61%<sup>1</sup>. Among the 65+ agment, linear television is by far the most common way to watch TV on a weekly basis (89,0%); less than half of the 65+ years old report watching in timeshifted mode (46,2%), and other types of viewing are rarely done on a weekly basis by the oldest age group (< 6%).

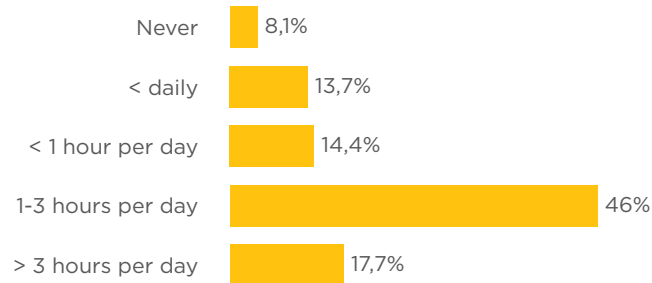
<sup>1</sup> However, we must point out that the figures here merely express the perception of the Flemish people. Our methodology does not allow to make assumptions about the actual amount of time spend per type of TV consumption. The results show how the Flemish perceive their TV content consumption.

## DAILY WATCHING TV CONTENT ON DIFFERENT DEVICES

	DAILY
TV set	78,2%
Laptop/desktop	14,8%
Tablet	9,2%
Smartphone	7,2%

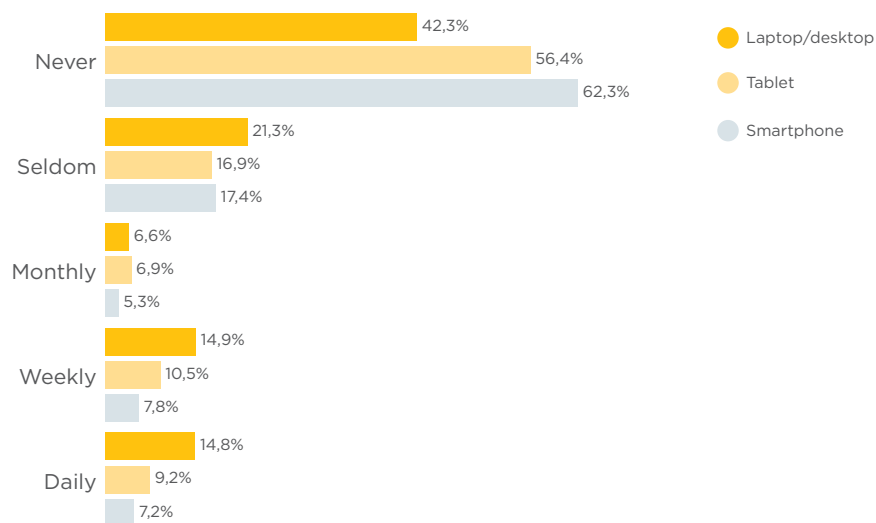
Table 8: Daily watching TV content on different devices (N=2.028)

## FREQUENCY OF WATCHING TV CONTENT ON TV SET



Graph 16: Frequency of watching TV content on a TV set (N=2.028)

## FREQUENCY OF WATCHING TV CONTENT ON OTHER DEVICES



Graph 17: Frequency of watching TV content on other devices (N=2.028)

## BREAKDOWN BY AGE FOR WEEKLY USE OF OTHER DEVICES TO WATCH TV CONTENT

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Laptop/ desktop	50,9%	61,2%	39,1%	29,1%	19,4%	7,4%	12,7%	<b>29,8%</b>
Tablet	22,6%	24,0%	30,0%	25,4%	20,1%	11,3%	7,1%	<b>19,7%</b>
Smartphone	40,3%	30,9%	22,7%	16,3%	7,1%	3,2%	0,9%	<b>15,0%</b>

Table 9: Breakdown by Age for Weekly Use of Other Devices to Watch TV Content (N=2.028)

## WAYS TO WATCH TV CONTENT

	EVER	MONTHLY	DAILY	EVOLUTION DAILY 2014-2013
Live/linear	95,3%	95,3%	<b>63,3%</b>	+7,5
Timeshifted viewing	80,1%	80,1%	<b>31,2%</b>	-2,5
Streaming websites (eg., YouTube, Sporza,...)	58,8%	58,8%	<b>11,9%</b>	-0,5
Online TV-applications (eg., Yelo TV, Stieve,...)	35,1%	35,1%	<b>4,2%</b>	+1,1
DVD of a program, movie, serie,...	63,6%	63,6%	<b>4,0%</b>	NA
VoD	43,6%	43,6%	<b>1,8%</b>	-0,1

Table 10: Ways to watch TV content (on people watching TV content on any device, N=1.967)

## BREAKDOWN BY AGE FOR WAYS TO WATCH TV CONTENT ON A WEEKLY BASIS

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Live/linear	<b>70,1%</b>	<b>61,1%</b>	75,6%	84,7%	81,9%	71,8%	<b>89,0%</b>	<b>78,6%</b>
Timeshifted viewing	72,9%	61,2%	<b>73,0%</b>	<b>76,5%</b>	64,2%	54,7%	46,2%	<b>63,2%</b>
VoD	10,6%	6,3%	10,3%	<b>13,5%</b>	8,7%	8,6%	3,6%	<b>8,4%</b>
Streaming websites	<b>47,8%</b>	<b>59,7%</b>	44,4%	34,8%	20,0%	6,2%	5,3%	<b>29,5%</b>
Online TV applications	19,9%	13,2%	16,8%	15,5%	12,8%	3,6%	2,8%	<b>11,5%</b>
DVD of a program	27,2%	30,2%	19,2%	14,8%	9,2%	8,0%	2,2%	<b>14,2%</b>

Table 11: Breakdown by Age for Ways to Watch TV Content on a Weekly Basis (on people watching TV content on any device, N=1.967)

## USING INTERNET WHILE WATCHING TV

- The usage of the internet while watching TV is becoming a more common practice. 69,8% say that they have engaged in an online activity while watching TV at least once last month. Last year this was 53,8%<sup>1</sup>.
- There has been a remarkable shift in the reasons why Flemings use the internet while watching TV. The most common practice at 61,0% is still to engage in actions not related to the program (like checking e-mail, checking newsfeeds on social media, consuming digital news, playing games,...), but this is remarkably lower than the 84,2% of last year. Program-related internet activities on the other hand have risen to 57,1% (coming from 43,4% last year)<sup>1</sup>, with the majority of the respondents looking for additional information on the program or checking the program website.
- Within the program-related activities<sup>1</sup>, the largest increases for information-related activities are attributed to browsing on the program website (+23,3 percentage points)\* and looking for additional info/images/videos of the program (+20,4 percentage points). This year, a quarter of the Flemings indicate to have shared their opinions or engaged in online conversations about the program in the last month (+8,2)\*. Voting or playing along with the program are less frequently done (9,8%) (+1,2)\*.
- The most common device for using the internet while watching TV is the desktop or laptop. The use of mobile devices such as smartphones or tablets depends on the activity. Smartphones are more preferred for giving an opinion about the program, and for engaging in actions not related to the program (e.g. emails). Tablets, on the other hand, are preferred for searching for additional information or for surfing to the program website.
- Performing internet activities while watching TV is correlated to the viewers' ages: the younger the viewer, the more common the practice is. Nine out of ten people between 15 and 29 years old use the internet while watching TV, whereas this is the case for only 36,5% of the people aged 65+.
- Facebook is by far the most frequently used channel to express opinions while watching the program (69,6%). The use of a program-specific second screen app is far less common (4,2%).

<sup>1</sup> The formulation of the question has been changed compared to the previous wave. Last year we asked if the respondents 'occasionally' engaged in internet activities while watching television, whereas this year we made this more specific by asking if they have done this 'in the last month'. That way, we want to avoid different interpretations of the intended time frame. Also, an extra item has been added ("To look up information about a commercial I saw on TV"). This means that comparison between both waves on this topic should be addressed with caution.

## USE OF THE INTERNET WHILE WATCHING TV: TYPE OF ENGAGEMENT AND DEVICE USED TO PERFORM THE ACTION LAST MONTH

	DESKTOP/ LAPTOP	TABLET	SMART- PHONE	SMART TV	GAME- CONSOLE	TOTAL (ON ANY DEVICE)	EVOLUTION 2014-2013 <sup>2</sup>
To give my opinion or to talk about a program	14,1%	7,3%	11,6%	0,3%	0,3%	24,9%	+8,2
To be able to vote or play along with the program	2,8%	1,7%	2,7%	0,9%	0,3%	9,8%	+1,2
To search for additional footage or information about the program	25,5%	17,1%	13,2%	1,4%	0,2%	42,9%	+20,4
To browse to the site of the program	26,0%	13,5%	8,9%	0,8%	0,1%	40,0%	+23,3
To look up information about a commercial I saw on TV	14,9%	7,6%	6,5%	0,5%	0,2%	26,0%	NA
For a reason not related to the program	42,7%	24,7%	29,1%	1,1%	1,3%	61,0%	-23,2

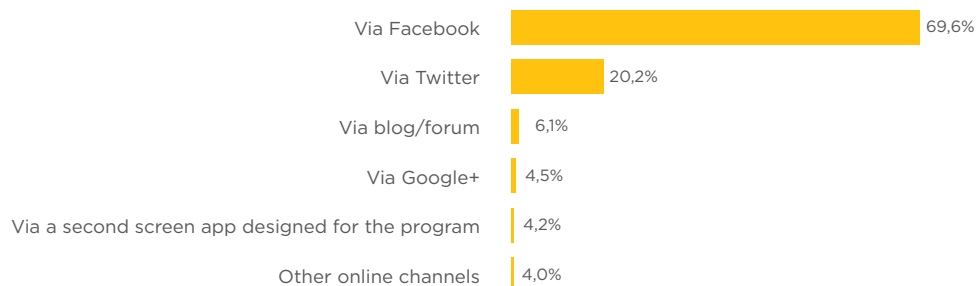
Table 12: Use of the internet while watching TV (N=2.028)

## BREAKDOWN BY AGE FOR USE OF THE INTERNET WHILE WATCHING TV

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Using the internet while watching TV	88,6%	92,0%	86,5%	77,2%	66,8%	63,2%	36,5%	<b>69,8%</b>

Table 13: Breakdown by Age for Use of the Internet while Watching TV (N=2.028)

## CHANNELS TO GIVE AN OPINION OR TO TALK ABOUT THE PROGRAM



Graph 18: Channels to give an opinion or to talk about the program  
(on people who claim to use internet to give opinion or to talk about the program, N=506)

<sup>2</sup> The formulation of the question has been changed compared to the previous wave. Last year we asked if the respondents 'occasionally' engaged in internet activities while watching television, whereas this year we made this more specific by asking if they have done this 'last month'. That way, we want to avoid different interpretations of the intended time frame. Also, an extra item has been added ("To look up information about a commercial I saw on TV"). This means that comparison between both waves on this topic should be addressed with caution.

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# FRAMING THE DATA

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## EMERGING SMART TV'S

According to the results of Digimeter 2014, a quarter of the Flemish people have a smart TV at home. This is not surprising, as 44% of the worldwide TV shipments are smart TV's, and this share is expected to increase to 73% in 2017<sup>1</sup>. Smart TV's are available in over a third of the TV-households in the US (35%)<sup>2</sup> and in Germany (38%)<sup>3</sup>. A study by GfK shows that 32% of the Belgian households had at least one smart TV in their household.<sup>4</sup>

## TV IS EVERYWHERE

The television set remains the most common device to consume TV content in Flanders, but is definitely not the only device. On a weekly basis, 30% of the Flemish people reports watching television content on a computer, 20% on a tablet and 15% on a smartphone. Especially the younger age groups are using those alternative TV screens. This phenomenon is not unique to Flanders. According to a Deloitte report for the US, 71% of the weekly time spent watching TV is consumed on a TV set; the other 29% is spent on watching TV on alternative devices such as a computer (16%), tablet (4%), smartphone (5%) or game console (4%). Amongst the youngest age group (14-24 years old), the so-called 'Trailing Millennials', only 44% of the weekly time spent watching TV content is consumed on a TV screen; 56% is spent on alternative devices such as a computer (32%), tablet (9%), smartphone (7%) or game console (8%).

With the launch of Stievie in December 2013, the arrival of Netflix in September 2014, and the increased efforts on cross media broadcasting of mainly VTM<sup>5</sup>, Vier<sup>6</sup> and Canvas<sup>7</sup>, the use of alternative screens to watch TV content on is only to increase.

<sup>1</sup> BusinessInsider.com, July 2014, "Smart TVs Are On Pace To Take Over The Entire TV Market", retrieved from: <http://www.businessinsider.com/smart-tvs-are-on-pace-to-take-over-the-entire-tv-market-2014-7>

<sup>2</sup> Parks Associates, May 2014, "Smart TV ownership in the US to reach 42 mln by year-end", retrieved from: <http://www.telecompaper.com/news/smart-tv-ownership-in-the-us-to-reach-42-mln-by-year-end-1014604>

<sup>3</sup> VPRT, July 2014, "GfU-Studie: Smart-TV nimmt an Bedeutung zu", retrieved from: <http://www.vprt.de/thema/marktentwicklung/marktdaten/enderger%C3%A4te/content/gfu-studie-smart-tv-nimmt-bedeutung-zu?c=0>

<sup>4</sup> GfK, Dec 2014, "GfK Jaargids 2014: Inzichten en marktontwikkelingen in de Benelux", retrieved from: [http://www.gfk.com/be/Documents/GfK\\_Jaargids%202014.pdf](http://www.gfk.com/be/Documents/GfK_Jaargids%202014.pdf)

<sup>5</sup> As from August 25th 2014, the episodes of most VTM programs can be retrieved for free on VTM.be, up to 4 weeks after broadcasting. The episodes are preceded with an unskippable video-advertisement.

<sup>6</sup> Episodes and fragments of programs like 'De Ideale Wereld', 'Geubels en de Belgen' en 'De Slimste Mens' are available for free on Vier.be.

<sup>7</sup> Canvas has announced that by the end of Spring 2015, the channel will be restyled and more targeted to a younger audience, with an increased focus on digital and mobile platforms.

## TIME SPENT WATCHING LIVE PROGRAMMING VERSUS TIMESHIFTED VIEWING

According to Digimeter, 63% of the Flemings reports watching live/linear television content every day, whereas the portion of Flemings reporting to watch timeshifted content is 31% every day. However, as Digimeter is based on self-reported data, this study can only make assumptions about to what extent live/linear programming and timeshifted viewing are represented in their perceived viewing pattern. To draw conclusions about the actual time spent watching live/linear content versus timeshifted content, another research paradigm and methodology is acquired. The CIM Television Study is based on logged data of content watched on a television set (using Audimeter-methodology by GfK), supplemented with a questionnaire for socio-demographic data<sup>8</sup>. According to the CIM Television Study, 93,5% of the time spent by Flemings (aged 15+) on a TV set on an average day, is spent on live/linear programming, and 6,5% is spent watching timeshifted viewing (maximum six days after broadcasting)<sup>9</sup>. This confirms the Digimeter conclusion that for many Flemings, live television on a TV set is still the standard way of watching TV content. However, the CIM TV study does not include time spent watching television content on another device (such as computers or mobile devices), and does not include Video on Demand.

## INCREASING LIFESPAN OF PROGRAMS

As the adoption of mobile devices is on the rise, media multitasking has become a reality for a majority of the Flemish people. 70% have performed an internet-related activity while watching TV in the last month. An increasing number reported having performed an internet-activity related to the program (mostly visiting the website of the program and looking for additional info on, or footage of the program). Although the laptop is more commonly reported as main device for engaging in media multitasking, the adoption of mobile devices is positively correlated with performing internet-related activities while watching TV. 81% of those having a smartphone or tablet reported having engaged in an internet activity while watching TV at least once in the last month. This is in line with findings in the US, where Nielsen shows that 84% of smartphone and tablet users have performed an internet-related activity while watching TV<sup>10</sup>.

<sup>8</sup> An elaborated view on the methodology of the CIM Television study can be retrieved from the CIM website: <http://www.cim.be/media/televisie/methodologie>

<sup>9</sup> CIM Television Study, Data based on minutes spent watching content on a television set on an average day in period week 1-45 2014. Figures provided by media agencies Space and OMD, and media companies Medialaan and VRT.

<sup>10</sup> Nielsen, Feb 2014, "The Digital Consumer", retrieved from: <http://www.nielsen.com/content/dam/corporate/us/en/reports-downloads/2014%20Reports/the-digital-consumer-report-feb-2014.pdf>





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# CHAPTER 02

## COMPUTER

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COMPUTER



CHAPTER 02





# GENERAL FACTS & FIGURES (N=2.028)

**92,0%**

of the respondents have a computer in their household

**54,3%**

Desktop (-1,0)\*

**79,4%**

Laptop (+0,7)\*

**41,7%**

Both (+0,1)\*

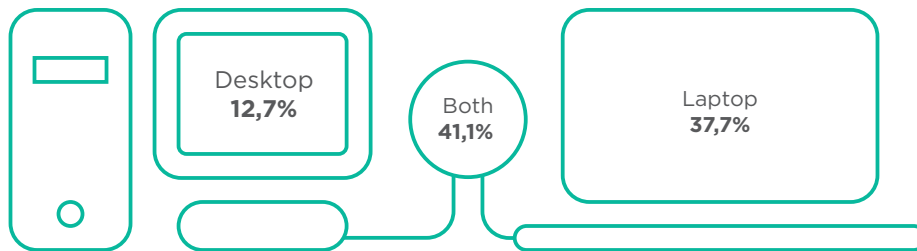
**92,4%**

of the Flemings have an internet connection in their household

## COMPUTER EQUIPMENT

### DESKTOP VS LAPTOP

Total adoption computers: **92,0%**



Graph 19: Computer equipment: Desktop vs Laptop (N=2.028)

COMPUTER

## NOT HAVING A COMPUTER AT HOME

Most of the people who don't have computers in their households at the moment, never had a computer at all (80,5%).

### DID YOU USED TO HAVE A COMPUTER IN YOUR HOUSEHOLD?

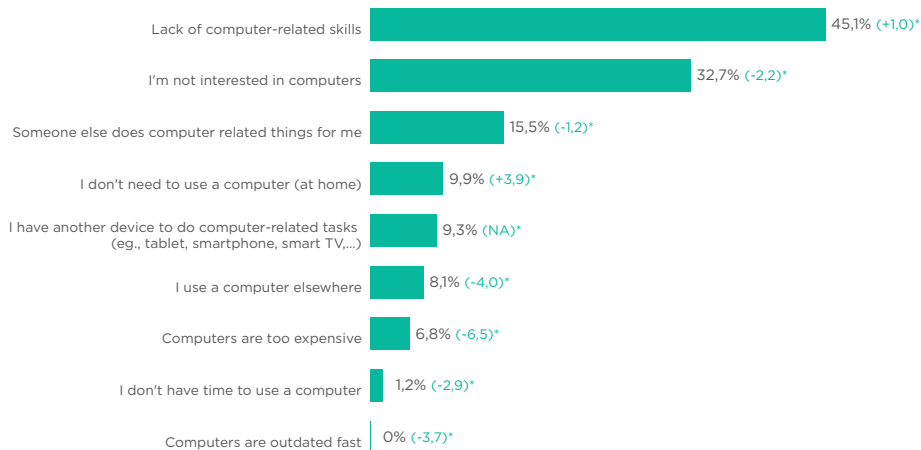


Graph 20: Did you use to have a desktop or laptop in your household?  
(on people who don't own a computer in their household at the moment, N=162)

## REASONS FOR NOT HAVING A COMPUTER AT HOME

Like last year, the two most important reasons for not having a computer in the household are the lack of computer-related skills (45,1%), and the lack of interest (32,7%). It is striking to note that cost (e.g. in buying a computer) is less and less of a barrier for computer adoption (Only 6,8% of the Flemings without a computer attribute cost as a reason, compared to 13,3% last year).

### REASONS FOR NOT HAVING A COMPUTER AT HOME



Graph 21: What are the most important reasons for not having a computer in your household?  
(on people who don't own a computer in their household for the moment, N=162)

## PROFILING OF COMPUTER ADOPTERS VS NON-ADOPTERS

People who do not own computers are generally older than 65 and retired, are lower educated, single without children or widow(er)s, and tend to have lower incomes.

	COMPUTER (N=1.866) (92,0%)	NO COMPUTER (N=162) (8,0%)	TOTAL (N=2.028) (100,0%)
<b>Gender</b>			
Men	50,9%	26,1%	<b>48,9%</b>
Women	49,1%	73,9%	<b>51,1%</b>
<b>Age</b>			
15-19	7,3%	1,1%	<b>6,8%</b>
20-29	15,4%	0,5%	<b>14,2%</b>
30-39	15,8%	5,3%	<b>15,0%</b>
40-49	19,0%	2,5%	<b>17,6%</b>
50-59	17,6%	9,7%	<b>17,0%</b>
60-64	7,0%	8,6%	<b>7,2%</b>
65+	17,9%	72,4%	<b>22,2%</b>
<b>Occupation</b>			
Student	13,9%	0,9%	<b>12,9%</b>
Blue-collar worker	8,7%	11,0%	<b>8,9%</b>
White-collar worker	22,9%	1,3%	<b>21,1%</b>
Public servant/Teacher	14,1%	1,6%	<b>13,1%</b>
C-level (eg., CEO, CFO,...)	4,5%	0,0%	<b>4,1%</b>
Self-employed	3,5%	2,2%	<b>3,4%</b>
Liberal profession	0,6%	0,2%	<b>0,5%</b>
Houseman/-wive	2,8%	0,0%	<b>2,6%</b>
Unemployed	3,4%	6,1%	<b>3,6%</b>
Retired	22,6%	75,6%	<b>26,8%</b>
Other	3,1%	1,2%	<b>2,9%</b>
<b>Degree</b>			
No degree or Primary education	8,7%	42,1%	<b>11,4%</b>
Lower secondary education	16,5%	30,9%	<b>17,6%</b>
Higher secondary education	42,7%	21,5%	<b>41,0%</b>
Bachelor degree	18,8%	4,0%	<b>17,6%</b>
Master or Post-university degree	13,4%	1,5%	<b>12,4%</b>

COMPUTER

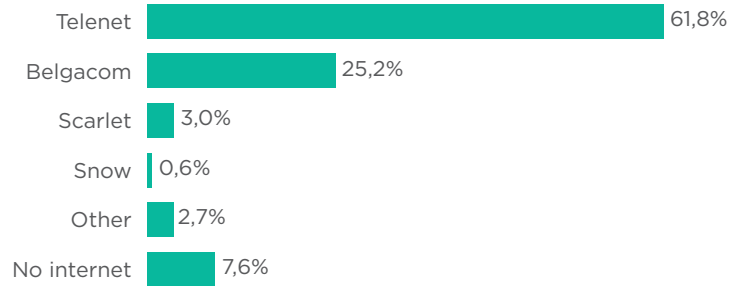
	COMPUTER (N=1.866) (92,0%)	NO COMPUTER (N=162) (8,0%)	TOTAL (N=2.028) (100,0%)
<b>Household situation</b>			
Single without children	13,9%	25,8%	14,9%
Single with child(ren)	6,0%	1,7%	5,7%
Married/living together without children	27,1%	15,6%	26,2%
Married/living together with child(ren)	31,2%	9,2%	29,4%
Living with both parents	12,1%	0,7%	11,2%
Living with one of my parents	4,5%	0,2%	4,2%
Living with others	1,5%	4,6%	1,7%
Widow/widower	3,7%	42,2%	6,8%
<b>Household members</b>			
1	17,4%	67,6%	21,4%
2	34,4%	28,2%	33,9%
3	17,3%	0,6%	15,9%
4	20,4%	1,0%	18,9%
5	8,1%	0,9%	7,5%
6	1,5%	0,5%	1,4%
> 6	0,8%	1,2%	0,8%
<b>Net income</b>			
No income	11,9%	2,2%	11,1%
< €1.000	6,1%	8,7%	6,3%
€1.000 - €1.500	15,4%	36,2%	17,1%
€1.501 - €2.000	23,3%	5,2%	21,8%
€2.001 - €3.000	16,9%	0,9%	15,6%
> €3.000	5,4%	2,2%	5,1%
Don't know	2,7%	5,6%	2,9%
Prefer not to say	18,1%	39,0%	19,7%

Table 14: Profiling of computer adopters versus non-adopters (N=2.028)

## INTERNET-PROVIDER IN THE HOUSEHOLD

92,4% have internet connections in their households. Most of the internet connections are provided by Telenet (61,8%) and Belgacom (25,2%).

### WHAT INTERNET PROVIDER DO YOU HAVE IN YOUR HOUSEHOLD?



Graph 22: Provider of internet connection at your household (N=2.028)

## COMPUTER AND INTERNET POSSESSION AT HOME

- 1,3% have computers at home but without internet connections.
- Inversely, 1,7% report having internet connections but no computers at home.

### COMPUTER AND INTERNET POSSESSION AT HOME

	INTERNET AT HOME	NO INTERNET AT HOME
Computer at home	90,8%	1,3%
No computer at home	1,7%	6,3%

Table 15: Computer and internet possession at home (N=2.028)

## NOT HAVING INTERNET AT HOME

Most people who don't have an internet connection at home at the moment, never had a connection in the past (81,0%).

### NOT HAVING INTERNET AT HOME

#### Did you use to have an internet-connection at home?

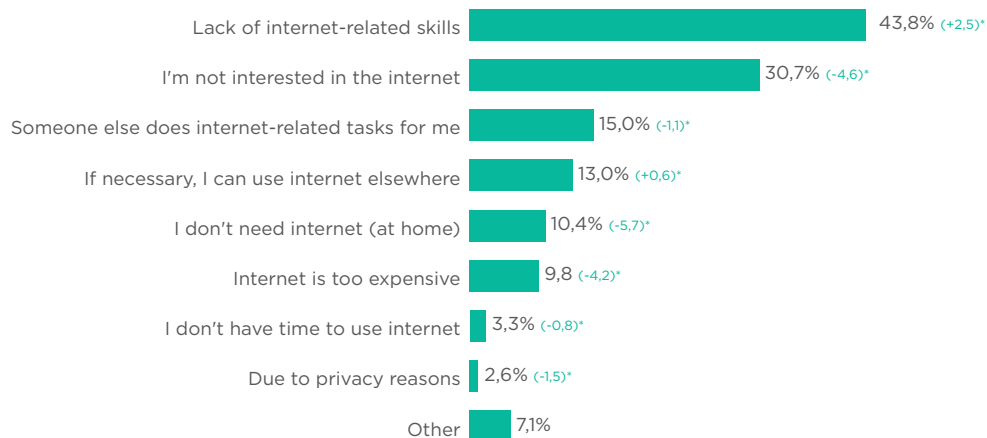
Yes	19,0%
No	81,0%

Table 16: Did you use to have an internet connection in your household? (on people not having internet in their household at the moment, N=153)

## REASONS FOR NOT HAVING INTERNET AT HOME

The most important reasons for not having internet connections at home, is because they lack internet-related skills (43,8%), or interest in the internet (30,7%). Privacy issues (2,6%) and lack of time (3,3%) are not the main reasons for their lack of internet connections. For internet adoption (as for computer adoption), cost is considered less and less of a barrier (Only for 9,8% of the Flemings consider paying for internet connection too expensive, compared to 14% in 2013).

### REASONS FOR NOT HAVING INTERNET AT HOME



Graph 23: What are the most important reasons to not have an internet-connection in your household? (on people not having internet in their household for the moment, N=153)

## PROFILING OF INTERNET ADOPTERS VS NON-ADOPTERS

People who do not have internet connections in their households tend to be older than 65 and retired, lower educated, single without children or widow(er), and have lower net incomes.

	COMPUTER	NO COMPUTER	TOTAL
	(N=1.866) (92,4%)	(N=162) (7,6%)	(N=2.028) (100,0%)
<b>Gender</b>			
Men	51,0%	23,6%	<b>48,9%</b>
Women	49,0%	76,4%	<b>51,1%</b>
<b>Age</b>			
15-19	7,3%	0,3%	<b>6,8%</b>
20-29	15,4%	0,0%	<b>14,2%</b>
30-39	16,1%	2,1%	<b>15,0%</b>
40-49	18,9%	2,5%	<b>17,6%</b>
50-59	17,7%	7,8%	<b>17,0%</b>
60-64	7,1%	8,2%	<b>7,2%</b>
65+	17,6%	79,1%	<b>22,2%</b>
<b>Occupation</b>			
Student	13,9%	0,1%	<b>12,9%</b>
Blue-collar worker	9,0%	7,5%	<b>8,9%</b>
White-collar worker	22,8%	0,5%	<b>21,1%</b>
Public servant/Teacher	14,1%	0,4%	<b>13,1%</b>
C-level (eg., CEO, CFO,...)	4,4%	0,0%	<b>4,1%</b>
Self-employed	3,5%	2,4%	<b>3,4%</b>
Liberal profession	0,6%	0,0%	<b>0,5%</b>
Houseman/-wive	2,7%	1,5%	<b>2,6%</b>
Unemployed	3,6%	4,0%	<b>3,6%</b>
Retired	22,3%	82,3%	<b>26,8%</b>
Other	3,0%	1,3%	<b>2,9%</b>
<b>Degree</b>			
No degree or Primary education	8,9%	42,2%	<b>11,4%</b>
Lower secondary education	16,5%	31,5%	<b>17,6%</b>
Higher secondary education	42,5%	22,0%	<b>41,0%</b>
Bachelor degree	18,8%	3,3%	<b>17,6%</b>
Master or Post-university degree	13,4%	1,1%	<b>12,4%</b>

COMPUTER

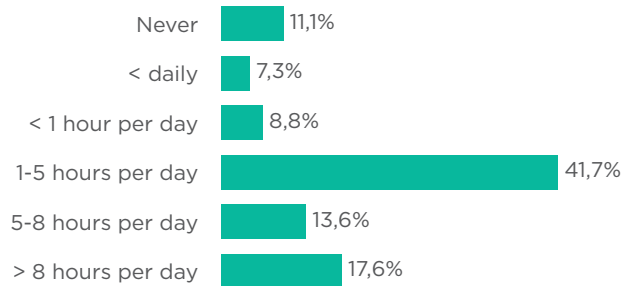
	COMPUTER (N=1.866) (92,4%)	NO COMPUTER (N=162) (7,6%)	TOTAL (N=2.028) (100,0%)
<b>Household situation</b>			
Single without children	14,3%	21,7%	14,9%
Single with child(ren)	5,8%	4,2%	5,7%
Married/Living together without children	27,0%	16,1%	26,2%
Married/Living together with child(ren)	31,1%	9,6%	29,4%
Living with both parents	12,1%	0,1%	11,2%
Living with one of my parents	4,5%	0,0%	4,2%
Living with others	1,6%	2,4%	1,7%
Widow/Widower	3,6%	45,9%	6,8%
<b>Household members</b>			
1	17,6%	68,1%	21,4%
2	34,2%	29,9%	33,9%
3	17,2%	0,0%	15,9%
4	20,4%	0,1%	18,9%
5	8,1%	0,6%	7,5%
6	1,5%	0,0%	1,4%
> 6	0,8%	1,3%	0,8%
<b>Net income</b>			
No income	12,0%	0,1%	11,1%
< €1.000	6,0%	10,7%	6,3%
€1.000 - €1.500	15,7%	33,7%	17,1%
€1.501 - €2.000	23,2%	4,9%	21,8%
€2.001 - €3.000	16,8%	1,7%	15,6%
> €3.000	5,6%	0,0%	5,1%
Don't know	2,5%	7,9%	2,9%
Prefer not to say	18,0%	41,0%	19,7%

Table 17: Profiling of internet adopters versus non-adopters (N=2.028)

## FREQUENCY OF USING A COMPUTER

Most people use a computer on average 1-5 hours per day (41,7%). Almost a third of the population (31,2%) uses a computer more than 5 hours a day.

### HOW FREQUENTLY DO YOU USE A COMPUTER, AT HOME OR SOMEWHERE ELSE?



Frequency of using a desktop and/or laptop, at home or somewhere else (N=2.028)

## PROFILING OF HEAVY COMPUTER USERS

People using a computer more than 8 hours a day are most likely men between 20-49 years old, white-collar workers or higher management or self-employed, married or living together with children, and have higher net incomes.

	< 8 HOURS A DAY	> 8 HOURS A DAY	TOTAL
	(N=1.672) (82,4%)	(N=356) (17,6%)	(N=2.028) (100,0%)
<b>Gender</b>			
Men	46,7%	60,1%	49,0%
Women	53,4%	40,2%	51,1%
<b>Age</b>			
15-19	7,7%	2,8%	6,8%
20-29	12,0%	24,4%	14,2%
30-39	11,5%	31,2%	15,0%
40-49	16,3%	24,4%	17,7%
50-59	18,0%	11,8%	17,0%
60-64	8,3%	2,0%	7,1%
65+	26,2%	3,7%	22,2%

	< 8 HOURS A DAY	> 8 HOURS A DAY	TOTAL
	(N=1.672) (82,4%)	(N=356) (17,6%)	(N=2.028) (100,0%)
<b>Occupation</b>			
Student	13,6%	9,6%	<b>12,9%</b>
Blue-collar worker	10,5%	2,0%	<b>8,9%</b>
White-collar worker	16,0%	44,9%	<b>21,2%</b>
Public servant/Teacher	12,8%	14,0%	<b>13,1%</b>
C-level (eg., CEO, CFO,...)	2,2%	12,9%	<b>4,1%</b>
Self-employed	2,8%	6,2%	<b>3,5%</b>
Liberal profession	0,4%	1,1%	<b>0,5%</b>
Houseman/-wive	3,0%	0,8%	<b>2,6%</b>
Unemployed	3,9%	1,4%	<b>3,6%</b>
Retired	31,7%	3,9%	<b>26,8%</b>
Other	2,9%	3,1%	<b>2,9%</b>
<b>Degree</b>			
No degree or Primary education	13,4%	2,0%	<b>11,4%</b>
Lower secondary education	19,7%	8,1%	<b>17,6%</b>
Higher secondary education	41,8%	37,1%	<b>41,0%</b>
Bachelor degree	15,6%	27,5%	<b>17,6%</b>
Master or Post-university degree	9,7%	25,3%	<b>12,4%</b>
<b>Household situation</b>			
Single without children	14,5%	16,3%	<b>14,9%</b>
Single with child(ren)	5,9%	4,8%	<b>5,7%</b>
Married/Living together without children	25,9%	27,2%	<b>26,2%</b>
Married/Living together with child(ren)	28,1%	36,0%	<b>29,4%</b>
Living with both parents	11,1%	11,8%	<b>11,2%</b>
Living with one of my parents	4,5%	2,8%	<b>4,2%</b>
Living with others	1,9%	1,1%	<b>1,7%</b>
Widow/Widower	8,2%	0,3%	<b>6,8%</b>
<b>Household members</b>			
1	22,8%	14,3%	<b>21,4%</b>
2	34,1%	32,9%	<b>33,9%</b>
3	15,1%	20,2%	<b>15,9%</b>
4	18,5%	20,5%	<b>18,9%</b>
5	7,2%	9,0%	<b>7,5%</b>
6	1,1%	2,8%	<b>1,4%</b>
> 6	1,0%	0,3%	<b>0,8%</b>

	< 8 HOURS A DAY	> 8 HOURS A DAY	TOTAL
	(N=1.672) (82,4%)	(N=356) (17,6%)	(N=2.028) (100,0%)
<b>Net income</b>			
No income	12,0%	7,3%	<b>11,1%</b>
< €1.000	7,2%	2,0%	<b>6,4%</b>
€1.000 - €1.500	17,8%	13,8%	<b>17,1%</b>
€1.501 - €2.000	20,0%	30,3%	<b>21,8%</b>
€2.001 - €3.000	13,8%	23,6%	<b>15,6%</b>
> €3.000	4,5%	8,1%	<b>5,1%</b>
Don't know	2,9%	3,1%	<b>2,9%</b>
Prefer not to say	21,5%	11,8%	<b>19,7%</b>

Table 18: Profiling of using a computer less than 8 hours a day versus more than 8 hours a day (N=2.028)

## INTERNET ACTIVITIES OF COMPUTER USERS

- The most common daily internet activities on a computer are e-mail (77,6%), browsing information (70,8%), social networking (52,1%) and news consumption (48,5%).
- Three out of four computer users (75,9%) have already engaged in e-commerce (either selling or buying via a website), but this is rather done on a monthly basis (43,0%) than as a daily routine (1,5%).
- Apart from functional activities (looking up information, e-mailing), the engagement in social media sites (52,1%) and news sites (48,5%) have become a daily computer routine.

## INTERNET ACTIVITIES OF COMPUTER USERS

	EVER	MONTHLY	DAILY <sup>1</sup>
E-mail	94,5%	91,0%	<b>77,6%</b>
Searching info	95,9%	91,9%	<b>70,8%</b>
Social network sites	77,9%	68,4%	<b>52,1%</b>
Visiting newssites	87,9%	75,9%	<b>48,5%</b>
Office (eg., Word, Excel, ...)	83,7%	67,8%	<b>35,2%</b>
Chat	60,0%	42,5%	<b>21,7%</b>
Playing games	59,9%	35,2%	<b>13,6%</b>
Streaming music	46,0%	28,0%	<b>10,0%</b>
Online banking	82,7%	77,0%	<b>7,9%</b>
Live internet-radio	58,1%	27,6%	<b>7,5%</b>
Watching live TV-program	44,9%	17,8%	<b>4,7%</b>
Downloading movies or series	38,6%	21,0%	<b>4,6%</b>
Streaming movies or series	41,6%	21,5%	<b>4,5%</b>
Making online phone calls (eg., Skype, Facetime)	56,7%	28,3%	<b>4,1%</b>
Downloading music	50,3%	25,5%	<b>4,1%</b>
E-commerce (buying or selling online)	75,9%	43,0%	<b>1,5%</b>
Podcast (streaming or downloading a previously aired radioshow)	30,2%	8,1%	<b>0,7%</b>

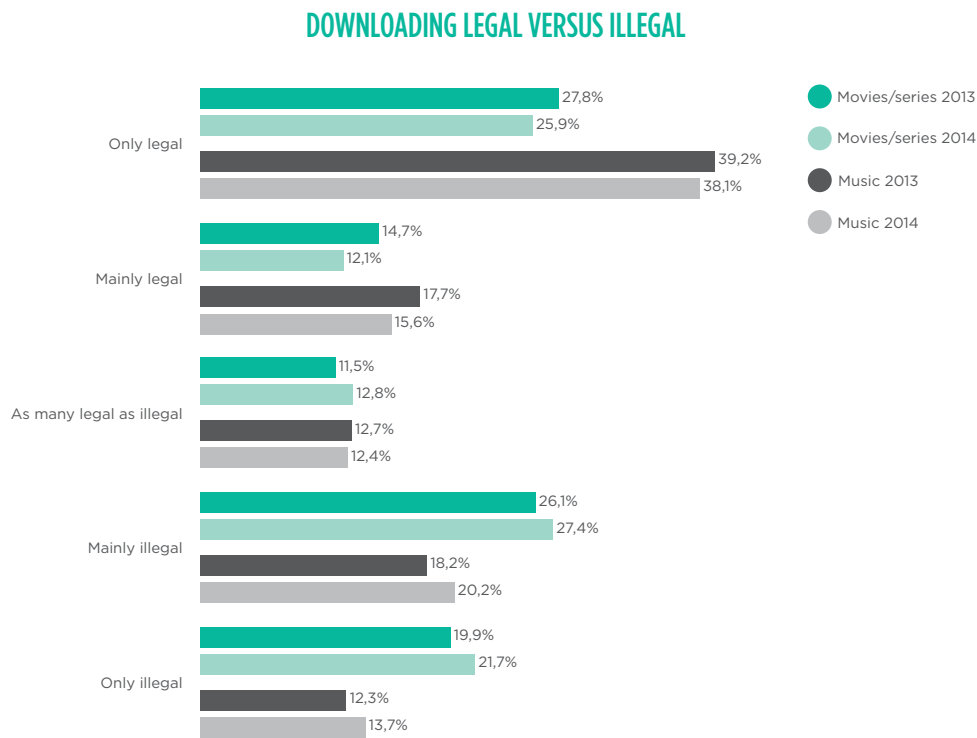
Table 19: Frequency of internet activities on a computer (on people using a computer, N=1.875)

<sup>1</sup> Compared to last year, the context of the questions on the use of computers have changed. Whereas last year we explicitly stated that the respondents should exclude the work-related tasks when filling out the questionnaire, this formulation has been deleted since this wave, to measure the overall use of a computer for internetrelated tasks (including both recreational activities as work-related tasks).

## DOWNLOADING: LEGAL VERSUS ILLEGAL

Half of the Flemish computer owners are experienced with downloading music (50,3%), and almost four out of ten (38,6%) have downloaded audiovisual content (movies/series) on their computers at least once. More than half of Flemish music downloaders state to mainly or only download music on a legal basis (53,7%)(-3,2)\*<sup>2</sup>. This is lower for downloading movies or series (38,1%) (-4,4)\*. Reversely, half of the respondents state to only or mainly download movies or series on a illegal basis (49,1%) (+3,1)\*, whereas this is the case for only one third of the music downloaders (33,9%) (+3,4)\*.

In short, we see that music is mainly downloaded legally, whereas movies and series are more downloaded on an illegal basis. However, for music and movies/ series, the proportion of respondents who claim to legally download content is decreasing, whereas the proportion of illegal downloaders is increasing.



Graph 24: Illegal versus legal downloading series/movies (on people downloading movies/series, N=725) and music (on people downloading music, N=942)

<sup>2</sup> In ensuring accuracy and keeping the threshold of admitting the downloading illegal content as low as possible, we have explicitly stated in the questions that all data are analyzed anonymously. However, we can only report what respondents believe to be legal or illegal sources to download content, not if the downloads are truly legal or illegal. As this is self-reported data, the results should be interpreted as perceptions of the respondents.

# FRAMING THE DATA



## INTERNET

The penetration of internet connection in Flanders has reached a point of stagnation. 92,4% of the Flemish population reports having an internet connection at home. While this figure might seem high, as the division of Statistics and Figures of the FPS Economy reports that only 83% of the Flemish households had an internet connection in 2013 <sup>1</sup>, the difference can be attributed to how the samples and populations are defined. The figures of FPS Economy are based on a household level (e.g. “How many households have access to the internet?”), whereas the results of Digimeter are measured on a personal level (e.g. “How many people have access to the internet in their household?”).

If we take a closer look at the FPS Economy figures, we see that there is a remarkable difference in internet availability by household size: The higher the household size, the higher the internet penetration. Taking into account that internet penetration is higher amongst larger households (i.e. with three or more household members) than amongst smaller or single households, the number of Flemish people with access to internet is expected to be higher than the number of Flemish households with access to internet.

<sup>1</sup> FPS Economy – Statistics and figures (Dutch: FOD Economie – Statistieken en analyses).

“2013 ICT-statistieken bij huishoudens”, retrieved from: [http://economie.fgov.be/nl/binaries/TabHH2013\\_NI\\_2014-01-24\\_tcm325-241523.xls](http://economie.fgov.be/nl/binaries/TabHH2013_NI_2014-01-24_tcm325-241523.xls) (table H0401).

	2006	2007	2008	2009	2010	2011	2012	2013
Total	60%	65%	69%	73%	77%	79%	80%	83%
Households without children	52%	58%	62%	66%	71%	73%	75%	78%
Households with children	80%	84%	88%	91%	95%	94%	95%	96%
One adult without children	37%	43%	47%	48%	55%	57%	61%	67%
One adult with children	59%	72%	-	-	-	-	-	-
Two adults without children	49%	56%	61%	68%	73%	77%	77%	79%
Two adults with children	81%	85%	89%	92%	96%	94%	97%	97%
Three or more adults without children	84%	88%	89%	93%	93%	95%	95%	96%
Three or more adults with children	88%	91%	93%	96%	95%	99%	95%	96%

Table 20: Source: FPS Economy; percentages of Flemish households with an internet-connection.  
Cells with symbol '-' have an insufficient sample size.

Hence, the Digimeter estimates (based on a personal level) are perfectly compatible with the federal statistics (based on a household level).

For 2014 this means that in Flanders, internet penetration on household level can be assumed at ca. 85% (extrapolating the growth rate of the previous years) while, on a personal level, internet penetration among the 15+ population is 92.4%.



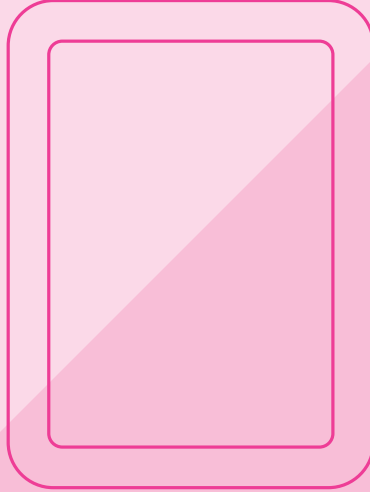
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# CHAPTER 03

TABLET

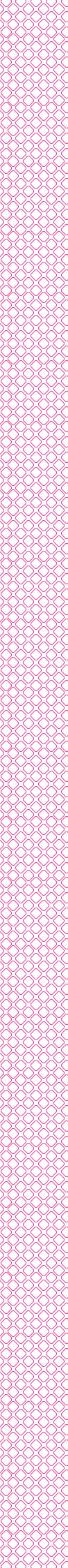
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TABLET



CHAPTER 03





# GENERAL FACTS & FIGURES (N=2.028)

**55,8%**

The adoption of tablets keeps on growing. At this point, 55,8% (+14,4)\* of the Flemish have access to at least 1 tablet in their household.

**49,8%**

of the most used tablets run on Apple iOS (iPads).

**55,0%**

of tablet owners have spent money on apps in the last 12 months.

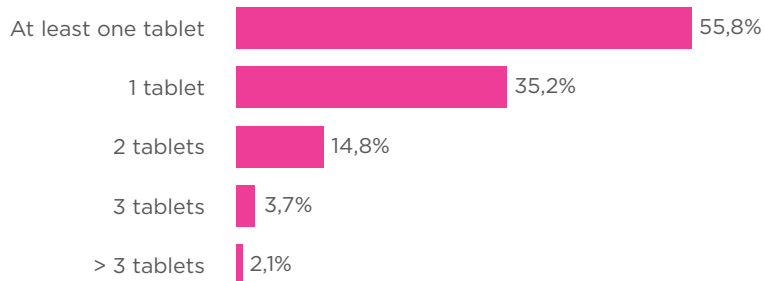
**5,9%**

of the Flemish people have 3 or more tablets in their household.

Owning a tablet does not mean using it: 7,7% of those who have a tablet at their disposal in the household, do not use it themselves.

## TABLET ADOPTION

### TABLET OWNERSHIP IN HOUSEHOLD DO YOU HAVE ACCESS TO ONE OR MORE TABLETS IN YOUR HOUSEHOLD?

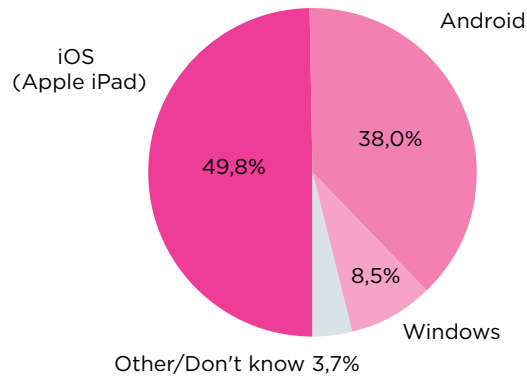


Graph 25: How many tablets do you have access to in your household? (N=2.028)

## OPERATING SYSTEM OF MOST USED TABLET

Half of tablets are iPads (Apple iOS). 38,1% of the tablets run on Adroid. Windows tablets have almost doubled their shares - from 4,4% in 2013 to 8,5% this year.

### OPERATING SYSTEM OF MOST USED TABLET

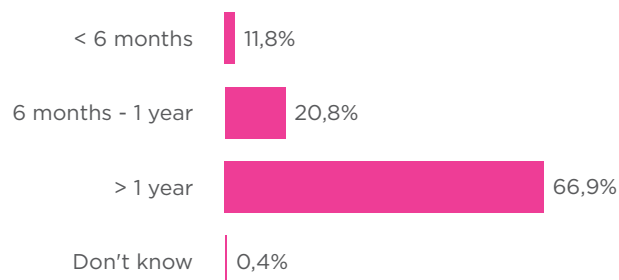


Graph 26: Operating system of most used tablet in household (on people having access to a tablet in their household, N=1.131)

## AGE MOST USED TABLET

1/3 of the tablets are less than 1 year old.

### AGE OF MOST USED TABLET



Graph 27: Age of most used tablet in household (on people having access to a tablet in their household, N=1.131)

## PROFILING OF TABLET ADOPTERS VERSUS NON-ADOPTERS

- The sample of tablet adopters is slightly more male than the total Flemish population.
- 65% of tablet owners are younger than 50 years old. In the total population, only 53,6% is younger than 50.
- Tablet adoption is higher among the higher educated, who are either white-collar workers or C-level managers, married or living together with children, and coming from larger family sizes (54,2% of the tablet owners live in households of at least 3 people, in the total population this is only 44,5%).

	TABLET (N=1.131) (55,8%)	NO TABLET (N=897) (44,2%)	TOTAL (N=2.028) (100,0%)
<b>Gender</b>			
Men	54,9%	41,4%	48,9%
Women	45,1%	58,6%	51,1%
<b>Age</b>			
15-19	7,5%	5,8%	6,8%
20-29	15,1%	13,0%	14,2%
30-39	18,0%	11,3%	15,0%
40-49	24,4%	9,1%	17,6%
50-59	17,1%	16,8%	17,0%
60-64	4,7%	10,3%	7,2%
65+	13,2%	33,6%	22,2%
<b>Occupation</b>			
Student	13,3%	12,4%	12,9%
Blue-collar worker	9,6%	8,1%	8,9%
White-collar worker	25,8%	15,3%	21,1%
Public servant/Teacher	15,4%	10,1%	13,1%
C-level (eg., CEO, CFO,...)	6,9%	0,6%	4,1%
Self-employed	4,4%	2,2%	3,4%
Liberal profession	0,6%	0,4%	0,5%
Houseman/-wife	2,6%	2,6%	2,6%
Unemployed	2,9%	4,5%	3,6%
Retired	16,6%	39,7%	26,8%
Other	2,0%	4,0%	2,9%

TABLET

	<b>TABLET</b>	<b>NO TABLET</b>	<b>TOTAL</b>
	(N=1.131) (55,8%)	(N=897) (44,2%)	(N=2.028) (100,0%)
<b>Degree</b>			
No degree or Primary education	6,0%	18,2%	11,4%
Lower secondary education	14,8%	21,2%	17,6%
Higher secondary education	43,3%	38,0%	41,0%
Bachelor degree	21,0%	13,3%	17,6%
Master or Post-university degree	14,9%	9,3%	12,4%
<b>Household situation</b>			
Single without children	11,2%	19,6%	14,9%
Single with child(ren)	4,9%	6,7%	5,7%
Married/Living together without children	26,5%	25,7%	26,2%
Married/Living together with child(ren)	37,2%	19,6%	29,4%
Living with both parents	12,5%	9,5%	11,2%
Living with one of my parents	3,8%	4,6%	4,2%
Living with others	1,4%	2,1%	1,7%
Widow/Widower	2,5%	12,2%	6,8%
<b>Household members</b>			
1	13,0%	32,0%	21,4%
2	32,8%	35,3%	33,9%
3	18,6%	12,6%	15,9%
4	25,5%	10,5%	18,9%
5	7,9%	7,0%	7,5%
6	1,7%	0,9%	1,4%
> 6	0,5%	1,2%	0,8%
<b>Household members</b>			
No income	11,4%	10,8%	11,1%
< €1.000	3,9%	9,4%	6,3%
€1.000 - €1.500	15,5%	19,1%	17,1%
€1.501 - €2.000	25,3%	17,4%	21,8%
€2.001 - €3.000	18,8%	11,6%	15,6%
> €3.000	7,0%	2,8%	5,1%
Don't know	1,8%	4,3%	2,9%
Prefer not to say	16,1%	24,3%	19,7%

Table 21: Profiling of tablet adopters versus non-adopters (N=2.028)

## PURCHASE INTENTION TO BUY A TABLET IN THE NEXT 12 MONTHS

- The purchase intention for buying a tablet remains high: 29,0% of the population is considering to buy one the following 12 months (6,8% is convinced to buy one, 22,2% is still in doubt). Striking is that this tablet purchase intention is more or less equally distributed over current tablet owners and those who don't have a tablet yet. 7,5% of the current tablet owners state buying an additional tablet in their households during the next 12 months. Additionally, 18,7% are considering doing that.

### PURCHASE INTENTION TO BUY A TABLET IN THE NEXT 12 MONTHS

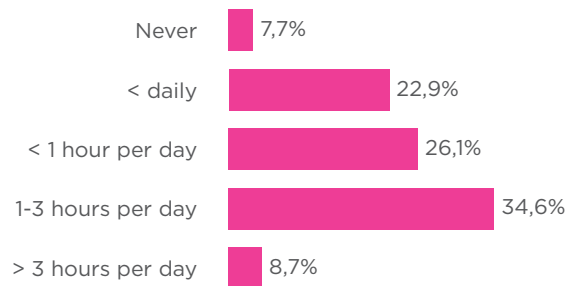
	<b>ALREADY HAS A TABLET</b> (N=1.131)	<b>NO TABLET</b> (N=897)	<b>TOTAL</b> (N=2.028)
<b>Yes</b>	7,5%	5,9%	<b>6,8%</b>
In doubt	18,7%	26,5%	<b>22,2%</b>
No	73,8%	67,6%	<b>71,0%</b>

Table 22: Purchase intention to buy a tablet following 12 months (N=2.028)

## USING A TABLET

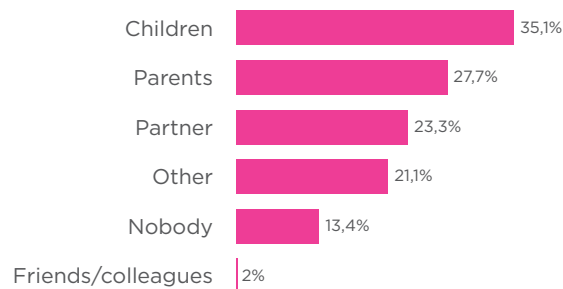
- 8,7% (+1,4)\* are heavy users of tablets, and spend at least 3 hours a day on their tablets.
- Most tablet owners spend an average of 1 to 3 hours daily using their tablets.
- 7,7% of those having access to a tablet in their household report never using the tablets themselves. In those cases, the tablets are used by their children (35,1%), their parents (27,7%) or their partners (23,3%).

### USING A TABLET



Graph 28: Frequency of using a tablet (on people having access to a tablet in their household, N=1.131)

### WHO'S USING THE TABLET IF THE RESPONDENT NEVER DOES?

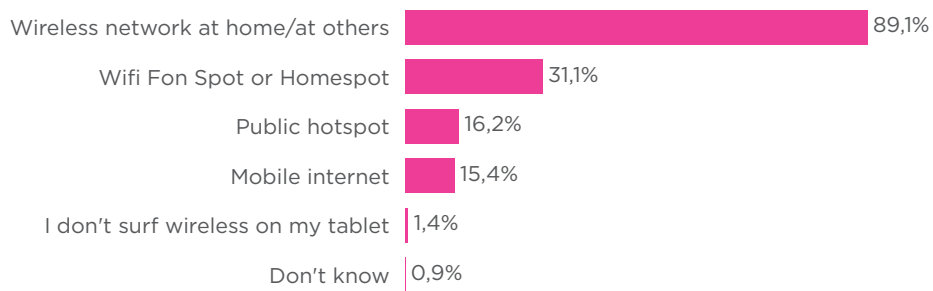


Graph 29: Who is using the tablet if the respondent never uses the tablet? (on people having access to a tablet in their household, but report never using it themselves, N=94)

## CONNECTIVITY

- Nearly all tablet users (98,6%) connect their tablet to a wireless internet connection.
- The most common type of internet connection for tablets is the WiFi-network at home or at others' (89,1%). 15,4% have a mobile internet connection for their tablets using SIM cards (via subscription or via prepaid card).

### SURFING WIRELESS ON TABLETS



Graph 30: Used internet connection for tablet (on people having access to a tablet in their household, N=1.131)

## ACTIVITIES ON THE TABLET

- The most popular daily activities on the tablet include: Emailing (reading 52,1% and sending 38,7%), searching for info (46,3%) social media (40,1%) and visiting newssites (37,4%).
- Activities that are least likely to be done on a tablet (% that replied 'Never' on the activity) are downloading movies/series (86,3%), listening to a podcast (83,9%) and downloading music (77,3%).
- E-commerce is rarely done on a daily basis (only 1,2%), but is ranked five places higher at monthly level, and 6 places higher when asked which activities they've ever done on a tablet. The same goes for making online phone calls (for instance via Skype or Facetime) where half of the respondents have done this at least once on a tablet, but only 2,4% make online phone calls on a daily basis.

## ACTIVITIES ON THE TABLET

TABLET

	EVER	MONTHLY	DAILY
Reading e-mails	90,4%	77,9%	<b>52,1%</b>
Searching info	94,8%	85,8%	<b>46,3%</b>
Social media	79,8%	67,0%	<b>40,1%</b>
Sending e-mails	86,7%	71,9%	<b>38,7%</b>
Visiting newssites	88,5%	71,2%	<b>37,4%</b>
Playing games	74,8%	55,3%	<b>24,3%</b>
Chat	56,2%	34,1%	<b>11,4%</b>
Tablet as e-reader	52,4%	28,9%	<b>9,9%</b>
Taking photos/videos	76,4%	44,3%	<b>8,2%</b>
Tablet as mp3-player	50,0%	31,3%	<b>8,0%</b>
Sharing photos/videos online	59,4%	31,3%	<b>5,7%</b>
Streaming music	38,8%	24,3%	<b>5,6%</b>
Online banking	46,8%	33,4%	<b>4,8%</b>
Live internet radio	40,3%	17,8%	<b>4,7%</b>
Office (Word, Excel,...)	54,9%	25,6%	<b>4,5%</b>
Bluetooth	42,4%	17,7%	<b>4,4%</b>
Streaming movies/series	32,5%	18,0%	<b>2,9%</b>
Making online phone calls (eg., Skype, Facetime)	49,4%	22,8%	<b>2,4%</b>
Downloading music	22,7%	9,6%	<b>2,1%</b>
Downloading movies/series	13,7%	4,7%	<b>1,4%</b>
E-commerce (buying/selling online)	44,0%	19,2%	<b>1,2%</b>
Podcast (streaming or downloading a previously aired radioshow)	16,1%	5,8%	<b>1,1%</b>

Table 23: Internet activities on tablet (on people having access to a tablet in their household, N=1.131)

## PAID APPLICATIONS ON TABLET

- 55,0% of the tablet users have paid for apps in the last 12 months.
- Buying apps is most common (42,5% has paid to buy an app in the last 12 months). Paying for media content in tablet apps (20,1%) and in-app purchases (15,9%) are less common<sup>2</sup>.
- For those who purchase apps, 55,3% have spent less than €10. For media content this is 52,6%, and for in-app purchases 68,3%.
- People paying for apps on a tablet are most likely males between 30 and 50 years old, white-collar workers or C-level managers with higher education and higher incomes, and living together with their partner and children.

### PAYING VERSUS NOT-PAYING FOR APPS

	PAID	NOT PAID
Total paying <sup>3</sup>	55,0%	45,0%
Purchase of apps	42,5%	57,5%
In-app purchases	15,9%	84,1%
Media-content via apps	20,1%	79,9%

Table 24: Have you spent money during last year on apps or content for your tablet? (on people having access to a tablet in their household, N=1131)

### AMOUNT SPENT ON APPS (IN TOTAL FOR LAST 12 MONTHS)

	< €5	€5 - €10	€10 - €20	€20 - €50	> €50	DON'T KNOW / PREFER NOT SAY
Purchase of apps	34,3%	21,0%	22,7%	12,1%	7,7%	2,3%
In-app purchases	45,0%	23,3%	8,3%	5,6%	11,1%	6,7%
Media-content via apps	32,9%	19,7%	14,5%	12,3%	14,5%	6,1%

Table 25: How much have you spent last year in total on apps or content for your tablet? (on people having paid for an app on their tablet, N=622)

<sup>2</sup> However, as these are survey-based results, we can only make assumptions about the perception Flemish tablet owners have regarding their spending behaviour. It is possible that respondents over- or underestimate their annual spending on apps.

<sup>3</sup> 'Total paying' is the net sum of people having paid for apps in the last 12 months, either by purchasing apps, by making in-app purchases, or by buying media-content via apps.

## PROFILING OF PEOPLE PAYING FOR APPS VERSUS NON-PAYERS

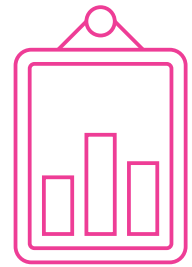
TABLET

	PAID APPS (N=622) (55,0%)	NO PAID APPS (N=509) (45,0%)	TOTAL TABLET (N=1.131) (100,0%)
<b>Gender</b>			
Men	62,5%	48,7%	54,9%
Women	37,5%	51,3%	45,1%
<b>Age</b>			
15-19	5,3%	9,4%	7,5%
20-29	13,5%	16,4%	15,1%
30-39	23,9%	13,1%	18,0%
40-49	28,6%	21,0%	24,4%
50-59	15,9%	18,0%	17,1%
60-64	3,4%	5,7%	4,7%
65+	9,4%	16,4%	13,2%
<b>Occupation</b>			
Student	9,0%	16,8%	13,3%
Blue-collar worker	8,6%	10,4%	9,6%
White-collar worker	30,1%	22,2%	25,8%
Public servant/Teacher	17,8%	13,4%	15,4%
C-level (eg., CEO, CFO,...)	9,8%	4,4%	6,9%
Self-employed	5,3%	3,6%	4,4%
Liberal profession	0,9%	0,4%	0,6%
Houseman/-wife	1,0%	3,9%	2,6%
Unemployed	3,7%	2,1%	2,9%
Retired	11,5%	20,7%	16,6%
Other	2,2%	1,9%	2,0%
<b>Degree</b>			
No degree or Primary education	3,1%	8,4%	6,0%
Lower secondary education	10,8%	18,0%	14,8%
Higher secondary education	41,0%	45,2%	43,3%
Bachelor degree	25,1%	17,6%	21,0%
Master or Post-university degree	19,9%	10,8%	14,9%

	<b>PAID APPS</b> (N=622) (55,0%)	<b>NO PAID APPS</b> (N=509) (45,0%)	<b>TOTAL TABLET</b> (N=1.131) (100,0%)
<b>Household situation</b>			
Single without children	11,3%	11,1%	<b>11,2%</b>
Single with child(ren)	5,8%	4,1%	<b>4,9%</b>
Married/Living together without children	26,0%	26,9%	<b>26,5%</b>
Married/Living together with child(ren)	40,9%	34,1%	<b>37,2%</b>
Living with both parents	10,6%	14,1%	<b>12,5%</b>
Living with one of my parents	3,7%	4,0%	<b>3,8%</b>
Living with others	1,1%	1,6%	<b>1,4%</b>
Widow/Widower	0,6%	4,0%	<b>2,5%</b>
<b>Household members</b>			
1	11,5%	14,2%	<b>13,0%</b>
2	34,3%	31,5%	<b>32,8%</b>
3	18,9%	18,3%	<b>18,6%</b>
4	26,2%	24,9%	<b>25,5%</b>
5	6,3%	9,2%	<b>7,9%</b>
6	2,2%	1,4%	<b>1,7%</b>
> 6	0,5%	0,5%	<b>0,5%</b>
<b>Net income</b>			
No income	7,4%	14,6%	<b>11,4%</b>
< €1.000	4,5%	3,4%	<b>3,9%</b>
€1.000 - €1.500	13,5%	17,1%	<b>15,5%</b>
€1.501 - €2.000	26,4%	24,4%	<b>25,3%</b>
€2.001 - €3.000	22,8%	15,6%	<b>18,8%</b>
> €3.000	9,6%	5,0%	<b>7,0%</b>
Don't know	1,6%	2,0%	<b>1,8%</b>
Prefer not to say	14,1%	17,8%	<b>16,1%</b>

Table 26: Profiling of people paying for apps in the last 12 months (buying apps, in-app purchases and buying media-content)  
(on people having access to a tablet in their household, N=1.131)

# FRAMING THE DATA



## FLEMINGS LOVE TABLETS

The adoption of tablets in Flanders keeps on booming. 56% claim that they have access to at least one tablet in their household and one in five has more than one tablet at home. In the Netherlands, the adoption of tablets seems to be at the same level, as 56% of the households have access to a tablet<sup>1</sup>. However, keep in mind that these results are derived from different population bases. Digimeter makes assumptions on a personal level (e.g. “How many people have access to a tablet in their household?”), while the Telecompaper study measures the adoption of tablets at a household level (e.g. “How many households have a tablet?”). As tablets are mainly adopted by larger households (54% of the Flemish tablet owners live in a household of at least 3 people), it is safe to assume that the adoption of tablets on a personal level in the Netherlands is still slightly higher than in Flanders.

In November 2013, Deloitte reported in a study that Belgium has one of the highest tablet adoption rates among the developed countries<sup>2</sup>. Deloitte even predicted that in 2014, at least 50% of the Belgians would own at least one tablet.

Comparing this with the Digimeter results, two things should be kept in mind. First of all, Digimeter makes assumptions based on the Flemish population, while the scope of the Deloitte study is the Belgian population. As ownership of tablets per household is higher in Flanders than in Wallonia<sup>3</sup>, it can be assumed that the adoption of tablets on a personal level is also higher in Flanders than in Belgium as a whole. Secondly, Deloitte reported the number of people owning a tablet, whereas Digimeter depicts the number of people with access to a tablet in their household. Therefore, it is more relevant to compare the Deloitte forecast for 2014 (50%) with the Digimeter headcount of Flemings currently using a tablet (51,5%).

<sup>1</sup> Telecompaper, Aug 2014, “Dutch Tablet User - Q2 2014”, retrieved from: <http://www.marketingfacts.nl/berichten/56-procent-van-nederlandse-huishoudens-beschikt-over-tablet>

<sup>2</sup> Deloitte, Nov 2013, “Global Mobile Consumer Survey 2013”, retrieved from: [http://www2.deloitte.com/content/dam/Deloitte/be/Documents/about-deloitte/Persbericht\\_Deloitte%20Global%20Mobile%20Consumer%20Survey%202013\\_NL.pdf](http://www2.deloitte.com/content/dam/Deloitte/be/Documents/about-deloitte/Persbericht_Deloitte%20Global%20Mobile%20Consumer%20Survey%202013_NL.pdf)

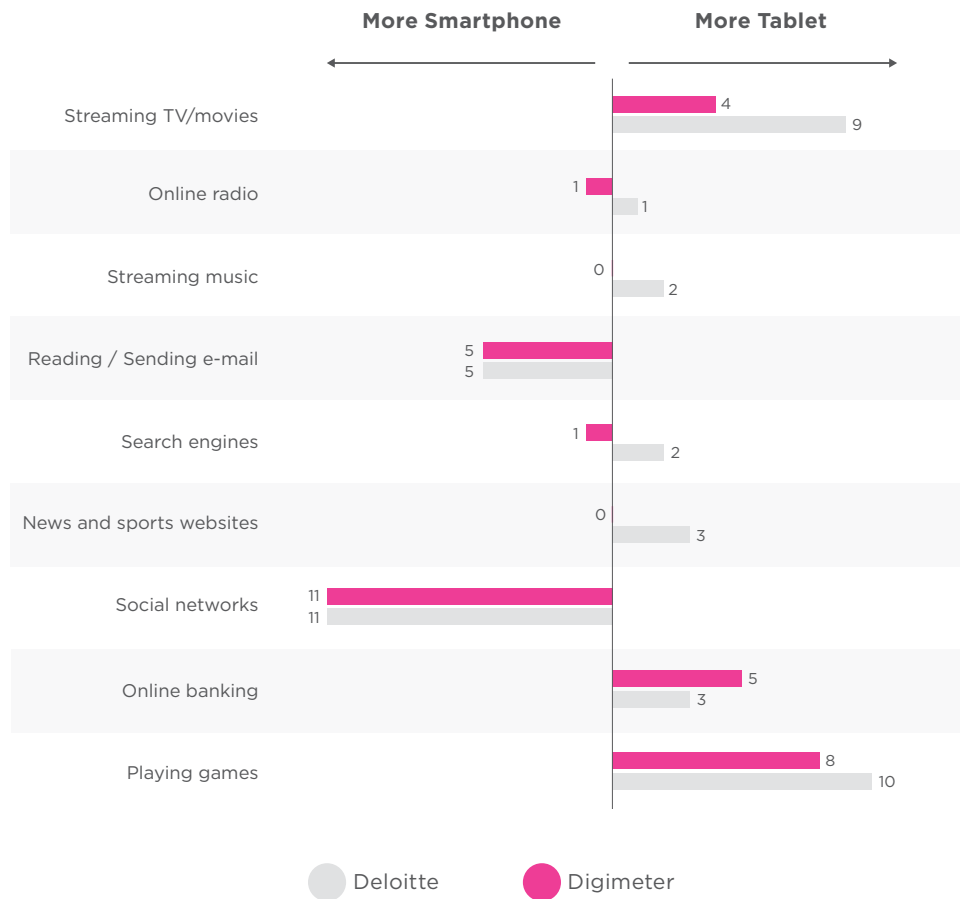
<sup>3</sup> FPS Economy - Statistics and figures (Dutch: FOD Economie - Statistieken en analyses), “2013 ICT-statistieken bij huishoudens”, retrieved from: [http://economie.fgov.be/nl/binaries/TabHH2013\\_Ni\\_2014-01-24\\_tcm325-241523.xls](http://economie.fgov.be/nl/binaries/TabHH2013_Ni_2014-01-24_tcm325-241523.xls) (table H0603).

## PREFERENCE FOR TABLET VS SMARTPHONE

Both Deloitte<sup>4</sup> and Digimeter have investigated which mobile device (tablet vs. smartphone) is more preferred for several online activities. The graph below shows the difference (in percentage points) between the number of tablet owners performing a certain activity on their tablets and the number of smartphone owners performing a similar activity on their smartphones (both on a weekly basis). A stronger skew to the left of the horizontal axis indicates a stronger preference towards smartphones, while a stronger skew to the right indicates a more pronounced preference towards tablets.

In both reports, tablets are more preferred by users for gaming, online banking and TV/movie streaming, while people tend to use their smartphones more frequently for social media and emailing. However, there is no preferred device when it comes to streaming music, listening to online radio and searching for information.

### PREFERENCE FOR TABLET VS SMARTPHONE FOR INTERNET ACTIVITIES ON A WEEKLY BASIS



TABLET

Graph 31: Preference for smartphones (skewed to the left on the graph) versus preference for tablets (skewed to the right on the graph) for performing internet related tasks. Comparing Digimeter 2014 (Flanders) with Deloitte Global Mobile Consumer Survey 2013 (Belgium).

<sup>4</sup> Deloitte, Nov 2013, "Global Mobile Consumer Survey 2013 - Top 10 Belgian mobile consumer facts (infographic)", retrieved from: [http://www2.deloitte.com/content/dam/Deloitte/be/Documents/technology-media-telecommunications/Global\\_mobile\\_consumer\\_survey\\_2013\\_-\\_infographic\\_complete\\_12\\_11\\_2013\\_15\\_58\\_15.pdf](http://www2.deloitte.com/content/dam/Deloitte/be/Documents/technology-media-telecommunications/Global_mobile_consumer_survey_2013_-_infographic_complete_12_11_2013_15_58_15.pdf)



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# CHAPTER 04

TELEPHONY

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TELEPHONY



CHAPTER 04





# GENERAL FACTS & FIGURES (N=2.028)

**99,6%**

Telephony is available to almost everyone in Flanders

**96,2%**

Mobile phone  
(+0,4)\*

**68,4%**

Fixed  
telephone  
line (-2,9)\*

**65,0%**

Both (-2,8)\*

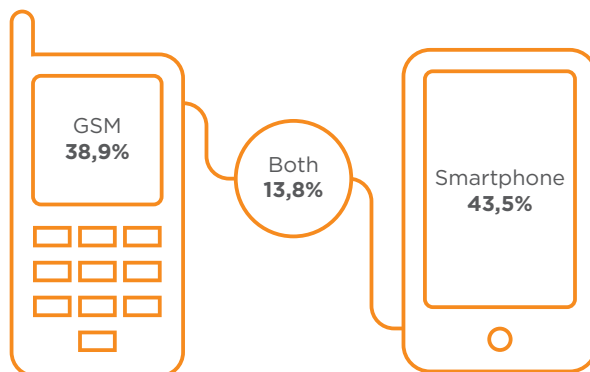
Smartphone adoption (57,3%) has surpassed GSM adoption (52,7%).

## SMARTPHONE ADOPTION

- For the first time, the adoption of smartphones (57,3%) has surpassed the adoption of GSM (52,7%).
- The adoption of smartphone has risen 9,7 percentage points in report to last year; GSM-adoption has lowered at the same rate.
- 13,8% have both smartphone and GSM (-0,4)\*.
- GSM owners tend to be more skewed towards retired women of 65 and older, lower educated and with lower incomes.
- Smartphone owners are more likely to be men younger than 50, and higher educated. Furthermore they are either white-collar workers/C-level managers, living together and having children, or are students living with both their parents and having no own income.

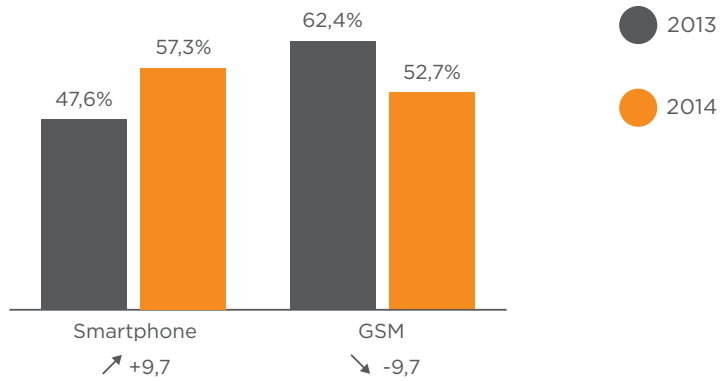
## ADOPTION SMARTPHONE VS GSM

Total adoption mobile phones: **96,2%**



Graph 32: Adoption smartphone vs GSM (N=2.028)

## ADOPTION SMARTPHONE VS GSM



Graph 33: Evolution adoption smartphone vs GSM (2013: N=3.519; 2014:N=2.028)

## PROFILING OF GSM-OWNERS VERSUS SMARTPHONE-OWNERS

	GSM (N=1.069) (52,7%)	SMART- PHONE (N=1.163) (57,3%)	TOTAL POPULATION (N=2.028) (100,0%)
<b>Gender</b>			
Men	43,7%	56,6%	48,9%
Women	56,3%	43,4%	51,1%
<b>Age</b>			
15-19	5,9%	9,0%	6,8%
20-29	9,9%	19,8%	14,2%
30-39	9,4%	21,1%	15,0%
40-49	16,3%	20,7%	17,6%
50-59	18,6%	14,9%	17,0%
60-64	9,4%	4,8%	7,2%
65+	30,5%	9,6%	22,2%
<b>Occupation</b>			
Student	10,7%	17,4%	12,9%
Blue-collar worker	9,6%	8,9%	8,9%
White-collar worker	16,6%	27,6%	21,1%
Public servant/Teacher	11,7%	14,8%	13,1%
C-level (eg., CEO, CFO,...)	1,7%	6,5%	4,1%
Self-employed	3,0%	3,9%	3,4%
Liberal profession	0,2%	0,8%	0,5%
Houseman/-wife	3,7%	1,2%	2,6%
Unemployed	3,2%	3,9%	3,6%
Retired	36,4%	12,7%	26,8%
Other	3,2%	2,3%	2,9%

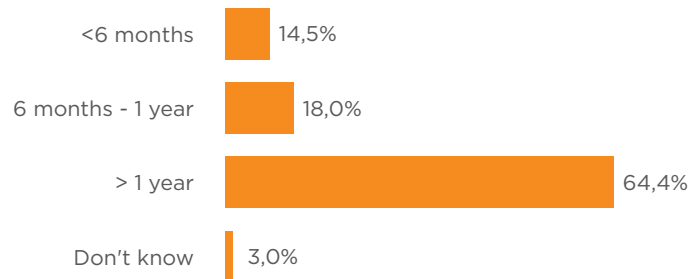
	<b>GSM</b> (N=1.069) (52,7%)	<b>SMART- PHONE</b> (N=1.163) (57,3%)	<b>TOTAL POPULATION</b> (N=2.028) (100,0%)
<b>Degree</b>			
No degree or Primary education	13,4%	4,9%	11,4%
Lower secondary education	21,2%	14,5%	17,6%
Higher secondary education	41,5%	42,6%	41,0%
Bachelor degree	14,7%	22,0%	17,6%
Master or Post-university degree	9,3%	16,0%	12,4%
<b>Household situation</b>			
Single without children	13,5%	15,1%	14,9%
Single with child(ren)	5,8%	5,4%	5,7%
Married/Living together without children	28,2%	23,8%	26,2%
Married/Living together with child(ren)	29,2%	32,9%	29,4%
Living with both parents	9,6%	14,4%	11,2%
Living with one of my parents	3,5%	5,4%	4,2%
Living with others	1,5%	1,4%	1,7%
Widow/Widower	8,7%	1,5%	6,8%
<b>Household members</b>			
1	23,0%	15,0%	21,4%
2	36,3%	30,7%	33,9%
3	14,1%	19,2%	15,9%
4	17,1%	24,0%	18,9%
5	6,8%	8,5%	7,5%
6	1,7%	1,8%	1,4%
> 6	0,9%	0,7%	0,8%
<b>Net income</b>			
No income	10,8%	13,5%	11,1%
< €1.000	6,1%	5,8%	6,3%
€1.000 - €1.500	21,1%	12,6%	17,1%
€1.501 - €2.000	17,8%	25,1%	21,8%
€2.001 - €3.000	13,5%	19,8%	15,6%
> €3.000	4,2%	7,2%	5,1%
Don't know	2,9%	2,4%	2,9%
Prefer not to say	23,4%	13,6%	19,7%

Table 27: Profiling of GSM-owners versus smartphone owners (N=2.028)

## AGE OF MOST USED MOBILE PHONE

Most mobile phones are older than one year (64,4%).

### AGE OF MOST USED MOBILE PHONE (GSM OR SMARTPHONE)

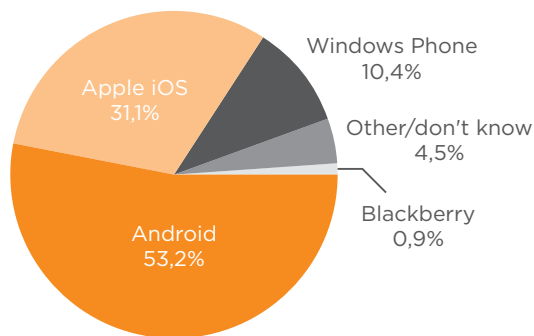


Graph 34: Age of most used mobile phone (on people owning a GSM or smartphone, N=1.953)

## OPERATING SYSTEM MOST USED SMARTPHONE

- Android remains the most popular smartphone operating system (53,2%), with iOS in second place (31,1%).
- Less than 1% report that their main smartphone is Blackberry (-3,4)\*; Additionally, the share of Windows phone users is growing (+1,8)\*.

### OPERATING SYSTEM MOST USED SMARTPHONE

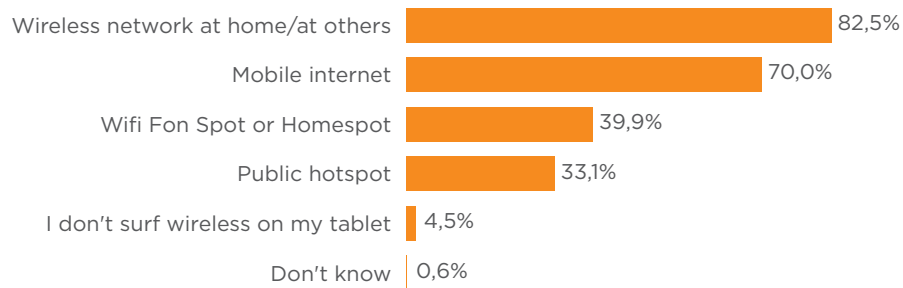


Graph 35: Operating system most used smartphone (on people owning a smartphone, N=1.163)

## CONNECTIVITY

- Surfing on a smartphone is mainly done via wifi at home/elsewhere (82,5%) or via mobile internet (70,0%). This indicates a difference in use between tablets and smartphones: Mobile internet subscription is only used by 15,4% of tablet users, assuming that tablets are used more at a fixed place (with a WiFi-connection), whereas smartphones are mostly used on-the-go, making a mobile internet connection more useful.
- A minority of 4,5% do not use their smartphones to surf on the Internet.

### SURFING WIRELESS ON SMARTPHONE



Graph 36: Used internet connection on smartphone (on people owning a smartphone, N=1.163)

## ACTIVITIES ON SMARTPHONE

- More than half of the smartphone owners use their smartphones for reading emails (65,0%) and checking social media (56,6%) on a daily basis.
- Activities that are least likely to be done on a smartphone (% that replied 'Never' on the activity) are downloading movies/series (95,1%), listening to a podcast (86,5%) and streaming movies/series.

## INTERNET ACTIVITIES ON SMARTPHONE

	EVER	MONTHLY	DAILY
Reading e-mails	91,7%	82,2%	<b>65,0%</b>
Social media	83,3%	74,1%	<b>56,6%</b>
Searching info	95,6%	86,2%	<b>44,3%</b>
Sending e-mails	87,8%	73,3%	<b>44,0%</b>
Visiting newssites	86,5%	70,0%	<b>37,1%</b>
Bluetooth	66,5%	39,7%	<b>21,8%</b>
Smartphone as mp3-player	67,3%	50,8%	<b>20,2%</b>
Playing games	67,2%	46,6%	<b>17,2%</b>
Taking photos/videos	88,6%	76,4%	<b>15,3%</b>
GPS	81,7%	53,2%	<b>8,2%</b>
Streaming music	37,5%	23,0%	<b>7,1%</b>
Sharing photos/videos online	62,8%	45,4%	<b>6,0%</b>
Live internet-radio	45,1%	19,3%	<b>4,6%</b>
Online banking	34,6%	25,9%	<b>4,1%</b>
Smartphone as e-reader	29,9%	11,7%	<b>3,1%</b>
Streaming movies/series	19,9%	10,5%	<b>2,3%</b>
Downloading music	21,3%	10,9%	<b>1,7%</b>
Podcast (streaming or downloading a previously aired radioshow)	13,5%	3,5%	<b>1,2%</b>
E-commerce (buying/selling online)	28,8%	10,8%	<b>0,9%</b>
Downloading movies/series	4,9%	1,7%	<b>0,3%</b>

Table 28: Internet activities on smartphone (on people owning a smartphone, N=1.163)

## TRADITIONAL VERSUS WEB-BASED COMMUNICATION

- Most smartphone owners still rely on mobile network subscriptions to make phone calls. Only one in five makes phone calls via web-based apps (eg., Skype, Facetime) on a monthly basis.
- Even more than making phone calls, texting is a daily routine for Flemings. Whereas less than half of the respondents claim to make phone calls every day, seven in ten report sending SMS on a daily basis. With 46,6%<sup>1</sup> using Facebook Messenger, WhatsApp, Google Hangout/Talk, Snapchat or iMessage on a daily basis, OTT-messaging is up and coming in Flanders<sup>2</sup>.

### TRADITIONAL VS OVER THE TOP COMMUNICATION

	EVER	MONTHLY	DAILY
Phone call via classic mobile network	96,7%	90,3%	<b>46,9%</b>
Phone call via web-based app	47,2%	20,8%	<b>2,6%</b>
SMS	98,3%	94,6%	<b>70,1%</b>
Facebook Messenger	60,6%	51,1%	<b>29,7%</b>
WhatsApp	41,1%	31,1%	<b>15,0%</b>
Google Hangout/Talk	17,4%	9,3%	<b>4,2%</b>
Snapchat	24,6%	20,2%	<b>12,4%</b>
iMessage (iPhone)	26,1%	23,4%	<b>16,3%</b>

Table 29: Traditional vs Over the Top Communication (on people owning a smartphone, N=1.163)

<sup>1</sup> Due to overlap in possession of web-based messaging apps (using more than one app on a daily basis), the sum of the percentages of people using web-based messaging apps everyday (29,7% + 15,0% + 4,2% + 12,4% + 16,3% = 77,5%) is higher than the net number of people using any web-based app on a daily basis (46,4%).

<sup>2</sup> A BIPT report on the economical situation in 2013 of the telecom industry in Belgium (<http://www.ibpt.be/nl/operatoren/telecom/statistieken/publicaties/economische-situatie-van-de-telecomsector-2013>) states the increased use of mobile data does not cannibalize on the use of SMS (in contrast to findings in for instance the Netherlands).

## PAID APPLICATIONS ON SMARTPHONE

- The willingness to pay for apps (buying app, in-app purchases or buying media content) is remarkably lower for smartphones (36,6%) than for tablets (55,0%).
- As with tablets, the purchase of apps for smartphone is most common (34,7% reports having paid to buy apps in the last 12 months). Making in-app purchases (13,2%) and buying media content for apps (11,9%) are not established amongst the Flemish smartphone users<sup>2</sup>.
- The amount spent on apps seems to be lower for smartphones versus tablets. 41,6% of people who have paid for smartphone apps, report spending less than €5 during the last 12 months (tablet: 34,3%). For in-app purchases this is 49,7% (tablet: 45,0%) and for media content this is 42,0% (tablet: 32,9%).

### PAID APPLICATIONS ON SMARTPHONE

	PAID	NOT PAID
Total paying <sup>3</sup>	36,6%	63,4%
Purchase of apps	34,7%	65,3%
In-app purchases	13,2%	86,8%
Media-content via apps	11,9%	88,1%

Table 30: Have you spent money during last year on smartphone apps last 12 months? (on people owning a smartphone, N=1.163)

### AMOUNT SPENT ON APPS (IN TOTAL FOR LAST 12 MONTHS)

	< €5	€5 - €10	€10 - €20	€20 - €50	> €50	DON'T KNOW / PREFER NOT SAY
Purchase of apps	41,6%	25,0%	14,6%	10,1%	5,9%	2,7%
In-app purchases	49,7%	22,9%	9,8%	5,9%	7,8%	3,9%
Media-content via apps	42,0%	18,8%	10,1%	10,1%	12,3%	6,5%

Table 31: How much have you spent in total on smartphone apps in the last 12 months? (on people having paid for smartphone apps, N=426)

<sup>2</sup> However, as these are survey-based results, we can only make assumptions about the perception Flemish smartphone-owners have regarding their spending behaviour. It is possible that respondents over- or underestimate their annual spending on apps.

<sup>3</sup> 'Total paying' is the net sum of people having paid for apps in the last 12 months, either by purchasing apps, by making in-app purchases, or by buying media content via apps.

## PROFILING OF PEOPLE PAYING FOR APPS VERSUS NON-PAYERS

	PAID FOR APPS (N=622) (55,0%)	NOT PAID FOR APPS (N=509) (45,0%)	TOTAL SMART-PHONE (N=1.131) (100,0%)
<b>Gender</b>			
Men	70,3%	48,7%	56,6%
Women	29,7%	51,3%	43,4%
<b>Age</b>			
15-19	6,6%	10,4%	9,0%
20-29	18,1%	20,8%	19,8%
30-39	24,4%	19,2%	21,1%
40-49	27,7%	16,7%	20,7%
50-59	13,7%	15,6%	14,9%
60-64	3,9%	5,3%	4,8%
65+	5,5%	12,0%	9,6%
<b>Occupation</b>			
Student	12,2%	20,4%	17,4%
Blue-collar worker	8,0%	9,4%	8,9%
White-collar worker	32,7%	24,7%	27,6%
Public servant/Teacher	15,5%	14,3%	14,8%
C-level (eg., CEO, CFO,...)	10,0%	4,5%	6,5%
Self-employed	5,6%	3,0%	3,9%
Liberal profession	1,0%	0,7%	0,8%
Houseman/-wife	0,4%	1,6%	1,2%
Unemployed	4,0%	3,8%	3,9%
Retired	7,9%	15,5%	12,7%
Other	2,7%	2,0%	2,3%
<b>Degree</b>			
No degree or Primary education	4,2%	5,3%	4,9%
Lower secondary education	10,5%	16,8%	14,5%
Higher secondary education	40,3%	43,8%	42,6%
Bachelor degree	24,0%	20,9%	22,0%
Master or Post-university degree	21,0%	13,1%	16,0%

	PAID FOR APPS (N=622) (55,0%)	NOT PAID FOR APPS (N=509) (45,0%)	TOTAL SMARTPHONE (N=1.131) (100,0%)
<b>Household situation</b>			
Single without children	13,7%	15,9%	<b>15,1%</b>
Single with child(ren)	5,9%	5,2%	<b>5,4%</b>
Married/Living together without children	26,7%	22,2%	<b>23,8%</b>
Married/Living together with child(ren)	36,6%	30,8%	<b>32,9%</b>
Living with both parents	11,7%	16,0%	<b>14,4%</b>
Living with one of my parents	4,0%	6,1%	<b>5,4%</b>
Living with others	1,1%	1,6%	<b>1,4%</b>
Widow/Widower	0,2%	2,2%	<b>1,5%</b>
<b>Household members</b>			
1	13,3%	16,1%	<b>15,0%</b>
2	34,9%	28,2%	<b>30,7%</b>
3	19,0%	19,3%	<b>19,2%</b>
4	24,0%	24,0%	<b>24,0%</b>
5	6,9%	9,5%	<b>8,5%</b>
6	1,4%	2,1%	<b>1,8%</b>
> 6	0,5%	0,8%	<b>0,7%</b>
<b>Net income</b>			
No income	8,7%	16,2%	<b>13,5%</b>
< €1.000	4,7%	6,4%	<b>5,8%</b>
€1.000 - €1.500	12,2%	12,8%	<b>12,6%</b>
€1.501 - €2.000	25,5%	24,8%	<b>25,1%</b>
€2.001 - €3.000	23,4%	17,7%	<b>19,8%</b>
> €3.000	10,0%	5,6%	<b>7,2%</b>
Don't know	2,1%	2,6%	<b>2,4%</b>
Prefer not to say	13,4%	13,7%	<b>13,6%</b>

Table 32: Profiling of people paying for apps in the last 12 months (buying apps, in-app purchases and buying media content)  
(on people owning a smartphone, N=1.163)



# FRAMING THE DATA

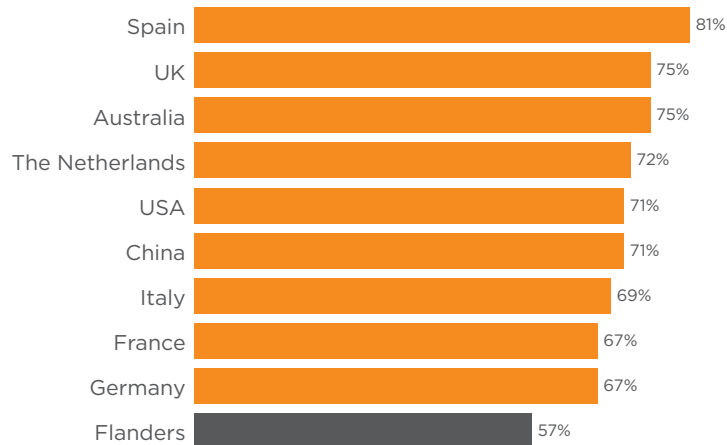


## SMARTPHONES ON THE RISE

In 2014, 57% of the Flemish population (15+) owns a smartphone – for the first time surpassing the number of GSM owners (53%).

While the adoption of smartphones has risen almost 10 percentage points compared to last year, this number remains low in comparison to other regions and countries in the world. In France, Germany and Italy<sup>1</sup>, smartphone adoption reaches between 65% and 70%. In the Netherlands<sup>2</sup>, the US<sup>3</sup>, China, Australia<sup>4</sup>, the UK and Spain, smartphone adoption is at least 70%.

### SMARTPHONE



Graph 37: Smartphone adoption per country, compared to Flanders (Digimeter 2014). Figures for Spain, UK, Italy, France and Germany based on "ComScore's New Study Examines the Growth of M-Commerce in the EU5". Figures for the Netherlands based on "Insight 2014 Q1: Digital adoption by the elderly" by Telecompaper. Figures for the USA based on "Mobile Millennials: Over 85% of Generation Y owns smartphones" by Nielsen. Figures for Australia and China based on "The Asian Mobile Consumer Decoded" by Nielsen.

<sup>1</sup> MarketingDigest, May 2014, "ComScore's New Study Examines the Growth of M-Commerce in the EU5", retrieved from: <http://marketingdigest.com/comscores-new-study-examines-the-growth-of-m-commerce-in-the-eu5/>

<sup>2</sup> Telecompaper, May 2014, "Insight 2014 Q1: Digital adoption by the elderly", retrieved from: <http://www.telecompaper.com/nieuws/smartphone-penetratie-bij-65-plussers-groei-82-1014189>

<sup>3</sup> Nielsen, May 2014, "Mobile Millennials: Over 85% of Generation Y owns smartphones", retrieved from: <http://www.nielsen.com/us/en/insights/news/2014/mobile-millennials-over-85-percent-of-generation-y-owns-smartphones.html>

<sup>4</sup> Nielsen, Jan 2014, "The Asian Mobile Consumer Decoded", retrieved from: <http://www.nielsen.com/ph/en/insights/news/2014/asian-mobile-consumers.html>

## A QUARTER OF ONLINE VISITS COMES FROM MOBILE DEVICES

A recent study by agency Wijs, analyzed the online traffic on the websites of about 100 of their clients (a combined reach of about 10 million visits per month)<sup>5</sup>. The report states that in Belgium, a quarter of all internet traffic comes from mobile devices (up from 17% a year ago); the most popular device being an iPad (37% of all mobile traffic). Last year's growth in smartphone adoption, clearly goes hand in hand with a similar growth in mobile internet use.

These findings are in line with the KPCB Internet Trends 2014 report by analyst Mary Meeker, declaring that worldwide a quarter of all internet page views are mobile (up from 14% a year ago)<sup>6</sup>.

<sup>5</sup> Wijs, Nov 2014, "Mobiel internetgebruik in België anno 2014", retrieved from: <https://wijs.be/nl/trends-inzichten/blog/detail/mobiel-internetgebruik-in-belgie%C3%AB-anno-2014>

<sup>6</sup> KPCB, May 2014, "Internet Trends 2014", retrieved from: [http://s3.amazonaws.com/kpcbweb/files/85/Internet\\_Trends\\_2014\\_vFINAL\\_-\\_05\\_28\\_14\\_-\\_PDF.pdf?1401286773](http://s3.amazonaws.com/kpcbweb/files/85/Internet_Trends_2014_vFINAL_-_05_28_14_-_PDF.pdf?1401286773)



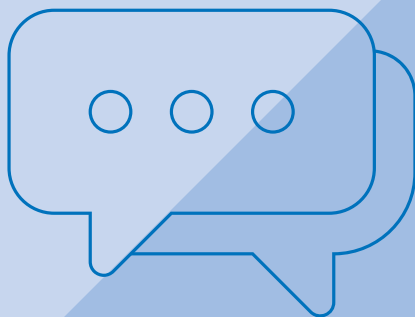
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# CHAPTER 05

SOCIAL MEDIA

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SOCIAL MEDIA



CHAPTER 05





# GENERAL FACTS & FIGURES (N=2.028)

**78,7%**

has a subscription on at least one social media site (+2,0)\*.

The top 3 social network sites are the same as last year:

**70,9%**

Facebook

**39,3%**

YouTube

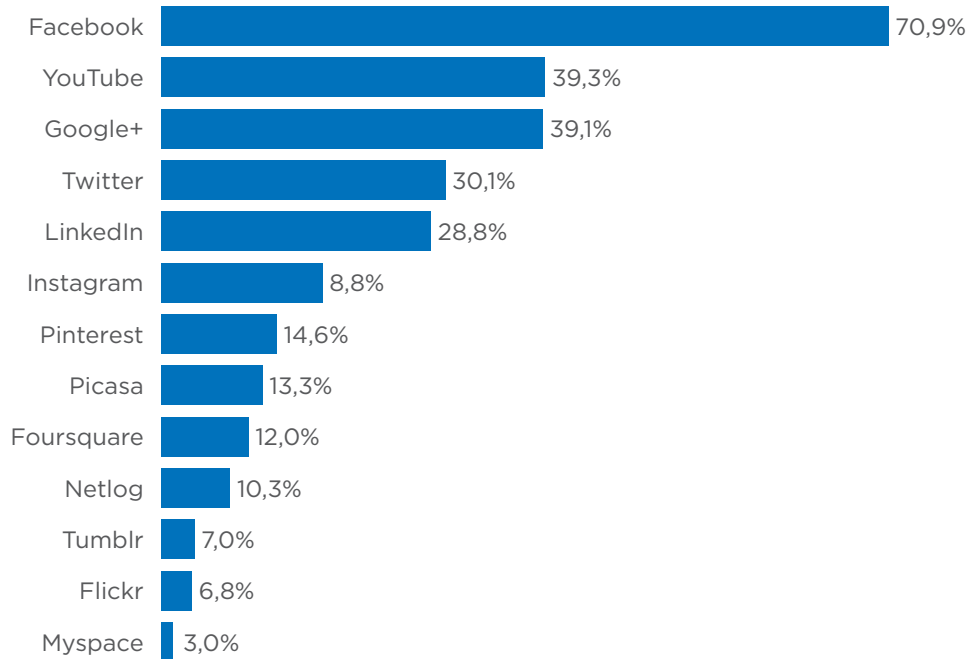
**39,1%**

Google+

The number of Flemings with a social media account is rising. In 2014, 78,7% has an account on at least one social media site (+2,0)\*.

Having an account doesn't necessarily mean using it often. While 78,7% have an account on at least one social media site, only 75,7% of the population have logged in on a social network site in the last month.

## ACCOUNTS ON SOCIAL NETWORK SITES



Graph 38: Having an account on a social network site (N=2.028)

## LOGGED IN LAST MONTH (% OF ACCOUNT OWNERS THAT LOGGED IN TO THAT ACCOUNT DURING LAST MONTH)

- Considering that having logged in to an account during the last month is an indication of 'actively using' that account, it is striking that Facebook by far has the highest share of active users in Flanders (95,6% of the Flemings that have a Facebook account, have logged in to their account in the last month). With seven in ten account owners having logged in during the last month, LinkedIn, Instagram, Twitter and YouTube share a second place when it comes to 'active use'.
- Myspace (19,7%) and Netlog (21,4%) have the least active users.

### USE OF SOCIAL MEDIA LAST MONTH

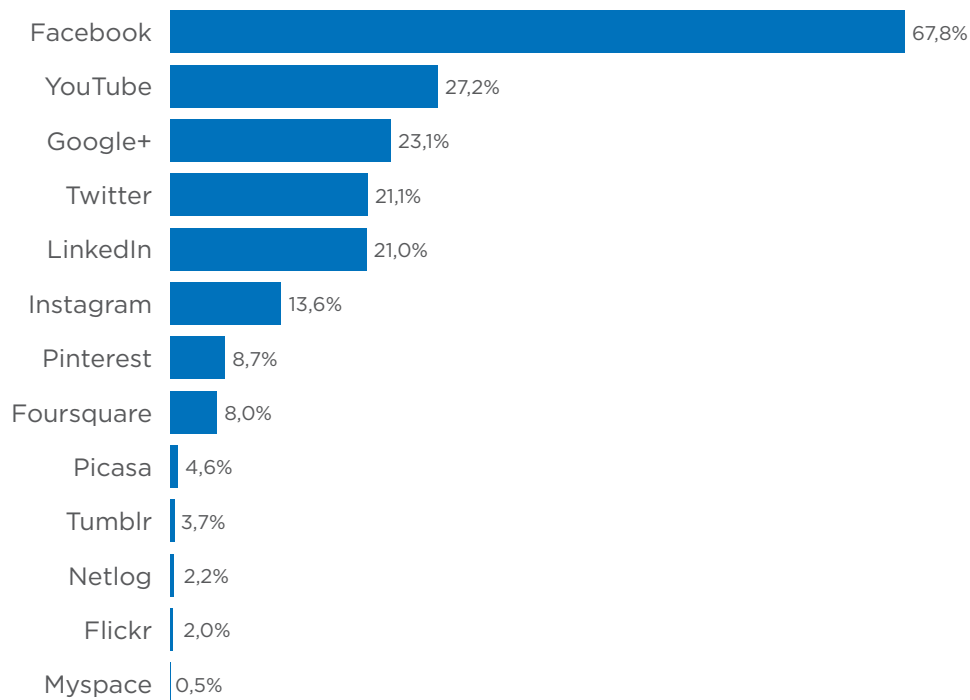
Facebook (N=1.439)	95,6%
LinkedIn (N=584)	73,1%
Instagram (N=382)	72,3%
Twitter (N=610)	70,2%
YouTube (N=796)	69,3%
Foursquare (N=244)	66,4%
Pinterest (N=297)	59,6%
Google+ (N=793)	59,1%
Tumblr (N=142)	52,8%
Picasa (N=269)	35,3%
Flickr (N=137)	29,2%
Netlog (N=210)	21,4%
Myspace (N=61)	19,7%

Table 33: On which of those social network sites have you logged in last month? (on those having an account on that social network site)

## HAVING AN ACCOUNT AND LOGGED IN LAST MONTH<sup>1</sup>

- Combining having an account on a social network site with actively using that account (having logged in during the last month), we can conclude that 67,8% Flemings are active Facebook users. Approximately one out of four Flemings have an active account on YouTube (27,2%) and Google+ (23,1%). Twitter (21,1%) and LinkedIn (21,0%) complete the top-5 social network sites based on active accounts in Flanders.
- MySpace (0,5%), Flickr (2,0%) and Netlog (2,2%) count the least active accounts.

### HAVING AN ACCOUNT AND LOGGED IN LAST MONTH



Graph 39: Having an account and logged in last month on a social network site (N=2.028)

<sup>1</sup> This is the combination of the first question (having an account on a social network site) and the second question (having logged in on that social media account during the last month). For instance, 70,9% of the Flemings have an account on Facebook. Of those having an account on Facebook, 95,6% have logged in on Facebook. So in total, 67,8% have an account on Facebook and has logged in on that site during the last month (95,6% of 70,9%). In that way, we get a view of which social network sites Flemings use the most. This figure is also most comparable to the Monthly Average Users (MAU's) that social network sites tend to communicate in their financial reports.

## BREAKDOWN BY GENDER FOR SOCIAL MEDIA USAGE DURING LAST MONTH

- Instagram, Picasa, Tumblr and MySpace are equally popular amongst men and women.
- Pinterest is the only social network which is significantly more adopted by Flemish women.
- The other social networks have a mainly male audience.

## USE OF SOCIAL MEDIA LAST MONTH PLOTTED BY GENDER

	MEN	WOMEN	TOTAL
Facebook (p=.015)	70,4%	65,3%	<b>67,8%</b>
YouTube (p=.000)	37,7%	17,2%	<b>27,2%</b>
Google+ (p=.000)	28,0%	18,4%	<b>23,1%</b>
Twitter (p=.000)	27,3%	15,2%	<b>21,1%</b>
LinkedIn (p=.000)	27,1%	15,3%	<b>21,0%</b>
Instagram (p=.712)	13,3%	13,9%	<b>13,6%</b>
Pinterest (p=.000)	4,9%	12,3%	<b>8,7%</b>
Foursquare (p=.006)	9,7%	6,4%	<b>8,0%</b>
Picasa (p=.383)	5,0%	4,3%	<b>4,6%</b>
Tumblr (p=.130)	3,0%	4,3%	<b>3,7%</b>
Netlog (p=.000)	3,6%	0,9%	<b>2,2%</b>
Flickr (p=.001)	3,1%	0,9%	<b>2,0%</b>
Myspace (p=.772)	0,5%	0,6%	<b>0,5%</b>

Table 34: Having an account and logged in last month on a social network site, breakdown by gender (N=2.028).  
A p-value of less than .05 indicates a statistically significant difference, in this case between men and women.

## BREAKDOWN BY AGE FOR SOCIAL MEDIA USAGE DURING LAST MONTH

- Age is clearly negatively correlated to having an active account on social media.
- Google+ and LinkedIn are mainly popular among the 20-49 year olds.
- Twitter, Pinterest and Foursquare are mostly used by 20-39 year olds.
- Flickr is most likely used by 30-49 year olds, whereas Picasa is used more by the 40-64 age group.
- Other social media sites such as Facebook, YouTube, Instagram and Tumblr have a younger profile (mainly popular by the less than 30 years old).

### USE OF SOCIAL MEDIA LAST MONTH PLOTTED BY AGE

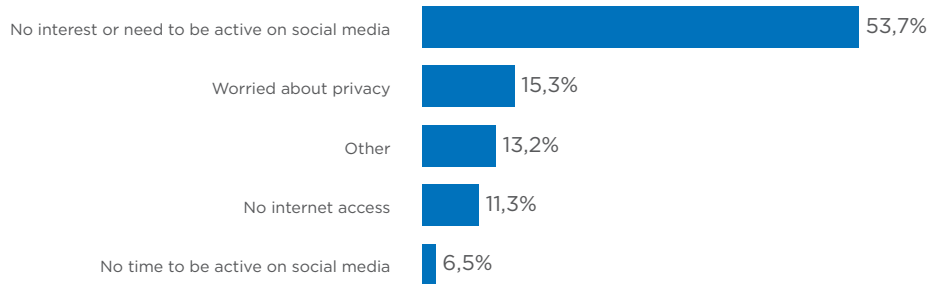
	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Facebook (p=.000)	94,7%	93,1%	82,1%	76,0%	67,6%	59,4%	30,4%	<b>67,8%</b>
YouTube (p=.000)	55,7%	59,0%	32,7%	23,3%	18,3%	8,1%	10,5%	<b>27,2%</b>
Google+ (p=.000)	20,7%	30,4%	24,1%	28,3%	22,4%	18,8%	16,5%	<b>23,1%</b>
Twitter (P=.000)	21,6%	40,0%	37,1%	25,5%	14,3%	9,9%	3,4%	<b>21,1%</b>
LinkedIn (P=.000)	2,4%	30,5%	39,3%	35,0%	18,5%	7,5%	3,6%	<b>21,0%</b>
Instagram (P=.000)	44,7%	34,4%	22,8%	8,7%	1,5%	5,5%	0,4%	<b>13,6%</b>
Pinterest (P=.000)	3,3%	20,4%	15,0%	13,1%	5,2%	1,3%	0,3%	<b>8,7%</b>
Foursquare (P=.000)	11,3%	21,0%	14,8%	8,6%	2,6%	0,7%	0,0%	<b>8,0%</b>
Picasa (P=.013)	0,4%	3,8%	2,9%	5,0%	6,8%	8,8%	4,5%	<b>4,6%</b>
Tumblr (P=.000)	13,9%	10,0%	6,0%	1,3%	0,8%	0,3%	0,3%	<b>3,7%</b>
Netlog (P=.614)	2,3%	1,0%	1,3%	4,1%	2,7%	1,0%	2,2%	<b>2,2%</b>
Flickr (P=.003)	0,8%	2,7%	3,3%	4,3%	1,4%	0,7%	0,0%	<b>2,0%</b>
Myspace (P=.068)	0,0%	0,4%	2,2%	0,7%	0,4%	0,0%	0,0%	<b>0,5%</b>

Table 35: Having an account and logged in last month on a social network site, breakdown by age (N=2.028).  
A p-value of less than .05 indicates a statistically significant difference, in this case between age groups.

## MAIN REASON FOR NOT HAVING AN ACCOUNT ON SOCIAL MEDIA

The main reason for not having a social media account is a lack of interest or the need to be active on social media (53,7%).

### MAIN REASON FOR NOT HAVING AN ACCOUNT ON SOCIAL MEDIA

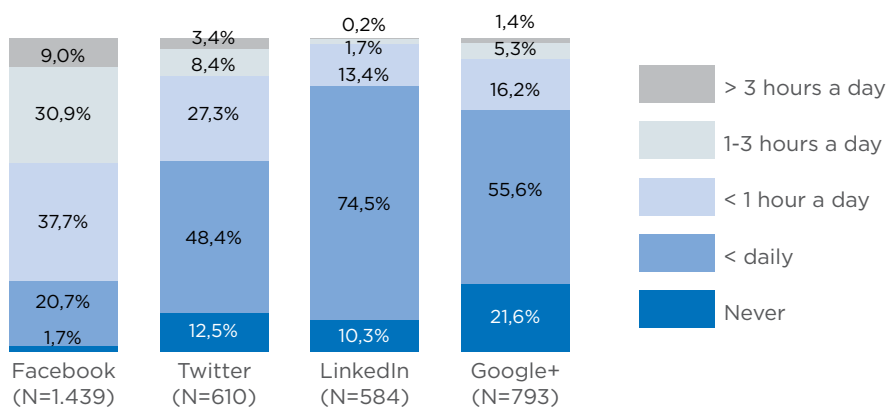


Graph 40: Main reason for not having an account on social media (on people who don't have an account on social media, N=432)

## FREQUENCY OF USING SOCIAL MEDIA

Facebook has the highest usage frequency: 39,9% of the Facebook account owners use it at least one hour a day; for Twitter (11,8%), LinkedIn (1,9%) and Google+ (6,7%) this is far less.

### FREQUENCY OF USING SOCIAL MEDIA



Graph 41: How frequently do you log in with following accounts? (on those having an account on that social network site)

## MAIN MOTIVES FOR VISITING SOCIAL MEDIA SITES

- The diversity of social media sites is also reflected in the users' main motives for visiting them.
- Facebook is mostly used to to pass time and to maintain/set up personal contacts. On the other hand, job hunting and setting up/maintaining business contacts is most likely done on other network sites than Facebook.
- Twitter is used more for sharing opinions/thoughts, following persons, activities and news sources, and commenting on TV programs. Setting up personal contacts and job hunting are most likely done on other social network sites.
- LinkedIn remains the main business network: it is the preferred network for online visibility, setting up or maintaining business contacts, and searching for a job. LinkedIn is not used for passing time, sharing opinions/thoughts, keeping up to date with news, consuming/sharing content or commenting on TV programs.
- Google+ seems to have the least pronounced motivational profile. Consuming and sharing content are slightly higher for Google+ than for Facebook or Twitter. Google+ is not likely to be chosen to search for a job or to comment on a TV program.

## MAIN MOTIVES FOR VISITING SOCIAL MEDIA SITES

	FACEBOOK (N=1.439)	TWITTER (N=610)	LINKEDIN (N=584)	GOOGLE+ (N=793)
Online visibility	9,5%	9,0%	13,8%	10,0%
To pass time	11,7%	9,2%	1,1%	5,3%
To share opinion or thought	7,3%	13,5%	2,4%	6,0%
To maintain or set up personal contacts	21,9%	5,6%	10,6%	14,3%
To maintain or set up business contacts	2,2%	5,2%	32,9%	8,7%
To follow other persons/activities	14,8%	18,7%	15,8%	14,6%
News sources	10,0%	17,0%	4,1%	12,6%
To look for a job	0,6%	1,2%	16,8%	2,2%
Consuming content (photo, video,...)	11,8%	7,8%	1,4%	14,5%
Sharing content (photo, video,...)	8,3%	6,8%	1,1%	10,7%
Comment on/follow TV programs	2,0%	6,0%	0,0%	1,0%

Table 36: What are the main motives to visit following social media sites? (on those having an account on that social network site)

## OPINION ON SOCIAL MEDIA

- Over one in five Flemings agree that they can't pass a day without social media (+3,6)\*.
- Most people agree that social media are time-consuming (+0,7)\* and that it gives them the opportunity to keep in contact with people they would otherwise lose contact with (+1,2)\*.
- Three out of ten Flemings say that a reason for having a social media account is because others also have one (+2,2)\*.
- Most people stay neutral when asked if social media sites violate their privacy (+3,1)\*. 35,7% indicate that they agree with the statement (+3,2)\*.
- One out of four agrees that they are sharing more now than before (-0,9)\*.
- 30,3% says that they can be triggered to watch a TV program when they see messages about that program on a social network site.

### OPINION ON SOCIAL MEDIA

	(TOTAL) DISAGREE	NEUTRAL	(TOTAL) AGREE
I can't pass a day without social media	60,6%	17,6%	<b>21,8%</b>
Social media are time-consuming	12,1%	26,1%	<b>61,8%</b>
Social media give me the opportunity to keep in touch with people I would otherwise lose contact with	15,0%	19,8%	<b>65,3%</b>
I have an account on social media because others also have an account	40,4%	29,0%	<b>30,7%</b>
Social media violate my privacy	23,8%	40,5%	<b>35,7%</b>
I'm sharing more now on social media than before	50,4%	24,2%	<b>25,4%</b>
Messages on social media about TV programs can trigger me to watch that program	42,0%	27,7%	<b>30,3%</b>

Table 37: Opinion on social media (on people having an account on at least one social media site, N=1.596)



# FRAMING THE DATA



## FACEBOOK: THE MOST POPULAR, BUT ALSO MOST CONTESTED SOCIAL NETWORK

According to Digimeter, 68% of the Flemish population has a Facebook account and has logged in during the past month.

It is by far the most used social network in Flanders, but does this mean that this is the most trusted social network? An IWT-SBO EMSOC-project survey revealed that this is not the case! 53% are worried about their privacy on Facebook, while only 16% are concerned about their privacy on Twitter.

The two other major drawbacks are the overload of irrelevant information (Facebook: 43%; Twitter: 20%) and the abundance of advertisements (Facebook: 37%; Twitter: 6%). Remarkable is that more Twitter users feel that they don't get out of it what they want (15%), compared to only 8% of the Facebook users.

### WHAT BOTHERS YOU? (%)

	FACEBOOK	TWITTER
I am worried about my privacy	53%	16%
There is too much useless information	43%	20%
There are too many advertisements	37%	6%
It takes too much time	25%	14%
It is addictive	22%	8%
It is anti-social	14%	7%
I cannot get out of it what I want	8%	15%
I had bad experiences with it	3%	1%
People of my age do not use it	3%	5%
Too few friends are using it	3%	22%

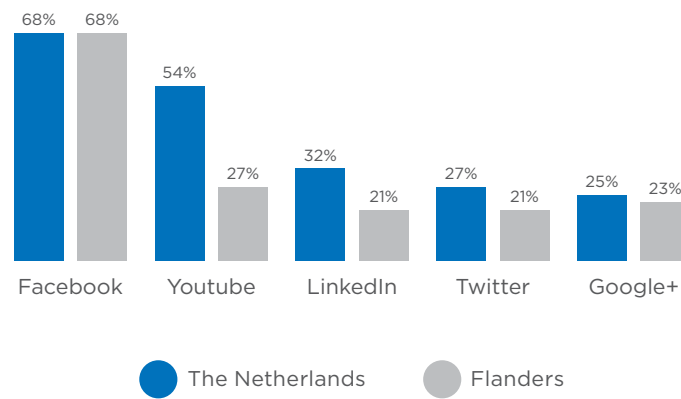
Table 38: What bothers you on Facebook/Twitter?  
("Emsoc Survey Report 2014 Social Media use and experience of the Flemish population", Nov 2014)

<sup>1</sup> IWT-SBO Emsoc, "Emsoc Survey Report 2014 - Social Media use and experience of the Flemish population"; for more information: Pieter.verdegem@ugent.be

## SOCIAL MEDIA IN THE NETHERLANDS

According to the National Social Media Survey 2014 carried out by Newcom Research & Consultancy on the Dutch population, the usage rate of social media in the Netherlands is at par with Flanders . However, there is a higher proportion of YouTube and LinkedIn users in the Netherlands compared to Flanders.

### USE OF SOCIAL MEDIA IN THE NETHERLANDS VERSUS FLANDERS



Graph 42: Use of social media in the Netherlands versus Flanders  
 (data on the Netherlands retrieved from "Nationale Social Media Onderzoek 2014" by Newcom Research & Consultancy, Jan 2014;  
 data on Flanders retrieved from Digimeter 2014)

<sup>2</sup> Newcom Research & Consultancy, Jan 2014, "Nationale Social Media Onderzoek 2014", retrieved from: <http://www.newcom.nl/social-media-onderzoek2014>



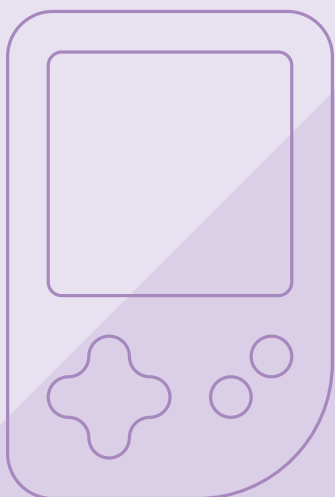
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# CHAPTER 06

GAMES

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GAMES



CHAPTER 06





# GENERAL FACTS & FIGURES (N=2.028)

**62,4%**

62,4% have played at least one game in the last month (+1,0)\*, with the most popular devices being

**37,0%**

Computer

**31,3%**

Tablet

**30,4%**

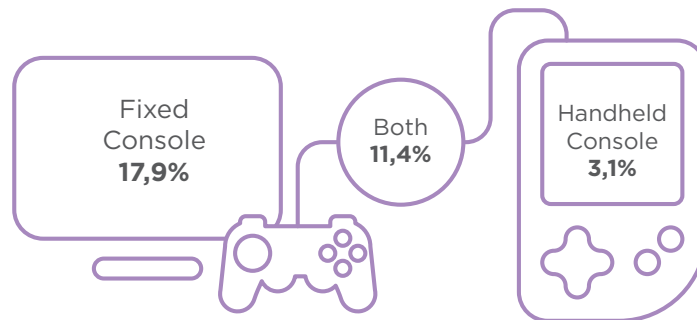
Mobile phone

There seems to be a turning point in the adoption of game consoles: After years of a decreasing trend, the adoption of game consoles has stabilized to 32,5% (+1,7)\*.

- Fixed console (connected to TV-screen): 29,4% (+1,5)\*
- Handheld console: 14,5% (+0,4)\*

## FIXED CONSOLES VERSUS HANDHELD CONSOLES

Total adoption game consoles: **32,5%**

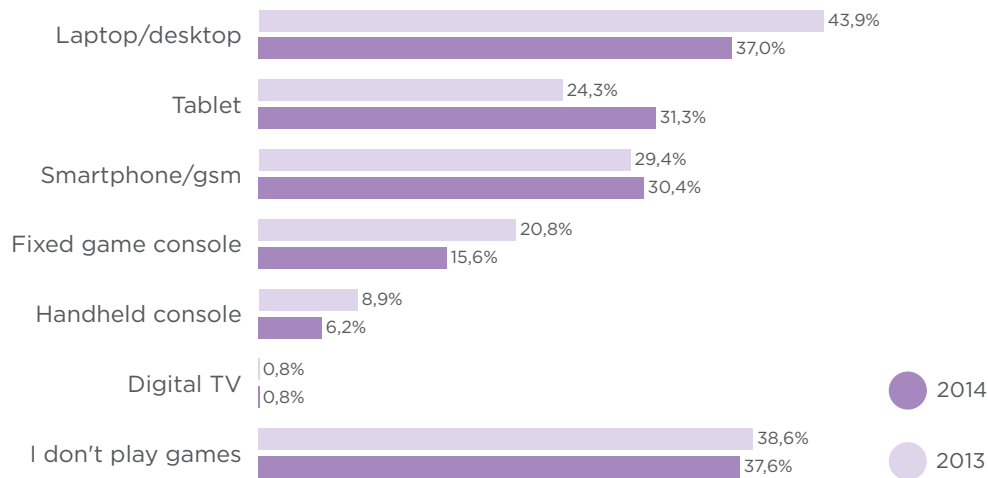


Graph 43: Adoption of fixed consoles versus handheld consoles (N=2.028)

## PLAYING GAMES ON DIFFERENT DEVICES

- Although comparing to last year's figures should be considered with caution<sup>2</sup>, it is striking that mobile gaming is gaining ground in Flanders. Three in ten Flemings have played mobile games in the last month (31,3% on tablet, 30,4% on smartphone), indicating that mobile gaming clearly took the lead compared to game consoles (15,6% have played a game on a game console in the same period, and only 6,2% on a handheld console). Moreover, mobile gaming is catching up with computer gaming (37% have played a game on a computer in the same period). Tablet gaming clearly shows the highest increase (+7,0)\*.

### PLAYING GAMES ON DIFFERENT DEVICES<sup>2</sup>

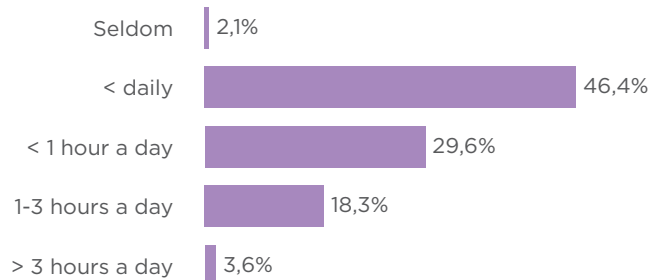


Graph 44: On which devices did you play a game during the last month?<sup>2</sup> (N=2.028)

## FREQUENCY OF PLAYING GAMES

- Almost half of those who play games, play less than daily.
- 21,9% play at least one hour a day.

### FREQUENCY OF PLAYING GAMES (ON THOSE WHO HAVE PLAYED GAMES IN LAST MONTH)



Graph 45: Frequency of playing games (on people who have played games last month, N=1.266)

<sup>2</sup> The formulation of the question has changed compared to the previous wave. Last year, we asked the respondents if they 'occasionally' played games on the listed devices, whereas this year we asked if they have played games 'during the last month' on those devices. That way, we want to avoid different interpretations of the intended time frame. However, this means that comparison between both waves on this topic should be addressed with caution.

## PROFILE OF GAMERS VS NON-GAMERS

- Age is an important determinant for the segment of gamers (48,9% of the gamers are younger than 40, whereas this is only true for 14,5% of the non-gamers).
- There are slightly more male gamers. Students living together with both parents are typical profiles for the gamers segment.

	<b>GAMERS</b> (N=1.266) (62,4%)	<b>NON-GAMERS</b> (N=762) (37,6%)	<b>TOTAL POPULATION</b> (N=2.028) (100,0%)
<b>Gender</b>			
Men	52,5%	43,1%	<b>48,9%</b>
Women	47,5%	56,9%	<b>51,1%</b>
<b>Age</b>			
15-19	9,6%	2,0%	<b>6,8%</b>
20-29	19,7%	5,1%	<b>14,2%</b>
30-39	19,6%	7,4%	<b>15,0%</b>
40-49	18,6%	16,0%	<b>17,6%</b>
50-59	13,7%	22,4%	<b>17,0%</b>
60-64	5,8%	9,4%	<b>7,2%</b>
65+	12,9%	37,7%	<b>22,2%</b>
<b>Occupation</b>			
Student	17,9%	4,5%	<b>12,9%</b>
Blue-collar worker	9,4%	8,1%	<b>8,9%</b>
White-collar worker	25,1%	14,5%	<b>21,1%</b>
Public servant/Teacher	12,5%	14,0%	<b>13,1%</b>
C-level (eg., CEO, CFO,...)	4,6%	3,2%	<b>4,1%</b>
Self-employed	2,7%	4,6%	<b>3,4%</b>
Liberal profession	0,6%	0,4%	<b>0,5%</b>
Houseman/-wive	3,0%	2,0%	<b>2,6%</b>
Unemployed	4,0%	2,9%	<b>3,6%</b>
Retired	16,9%	43,3%	<b>26,8%</b>
Other	3,1%	2,5%	<b>2,9%</b>
<b>Degree</b>			
No degree or Primary education	5,9%	20,5%	<b>11,4%</b>
Lower secondary education	18,2%	16,6%	<b>17,6%</b>
Higher secondary education	44,8%	34,7%	<b>41,0%</b>
Bachelor degree	19,0%	15,2%	<b>17,6%</b>
Master or Post-university degree	12,1%	13,0%	<b>12,4%</b>

	<b>GAMERS</b> (N=1.266) (62,4%)	<b>NON-GAMERS</b> (N=762) (37,6%)	<b>TOTAL POPULATION</b> (N=2.028) (100,0%)
<b>Household situation</b>			
Single without children	13,6%	17,0%	<b>14,9%</b>
Single with child(ren)	5,4%	6,2%	<b>5,7%</b>
Married/Living together without children	25,3%	27,7%	<b>26,2%</b>
Married/Living together with child(ren)	29,5%	29,3%	<b>29,4%</b>
Living with both parents	16,1%	3,0%	<b>11,2%</b>
Living with one of my parents	5,9%	1,4%	<b>4,2%</b>
Living with others	1,5%	2,1%	<b>1,7%</b>
Widow/Widower	2,8%	13,4%	<b>6,8%</b>
<b>Household members</b>			
1	15,5%	31,3%	<b>21,4%</b>
2	31,6%	37,8%	<b>33,9%</b>
3	18,1%	12,4%	<b>15,9%</b>
4	22,7%	12,5%	<b>18,9%</b>
5	9,0%	5,0%	<b>7,5%</b>
6	1,9%	0,5%	<b>1,4%</b>
> 6	1,0%	0,5%	<b>0,8%</b>
<b>Net income</b>			
No income	15,0%	4,6%	<b>11,1%</b>
< €1.000	6,3%	6,4%	<b>6,3%</b>
€1.000 - €1.500	15,4%	19,8%	<b>17,1%</b>
€1.501 - €2.000	26,1%	14,7%	<b>21,8%</b>
€2.001 - €3.000	15,3%	16,1%	<b>15,6%</b>
> €3.000	4,4%	6,4%	<b>5,1%</b>
Don't know	2,0%	4,3%	<b>2,9%</b>
Prefer not to say	15,0%	27,6%	<b>19,7%</b>

Table 39: Profiling of gamers versus non-gamers (N=2.028)



# FRAMING THE DATA



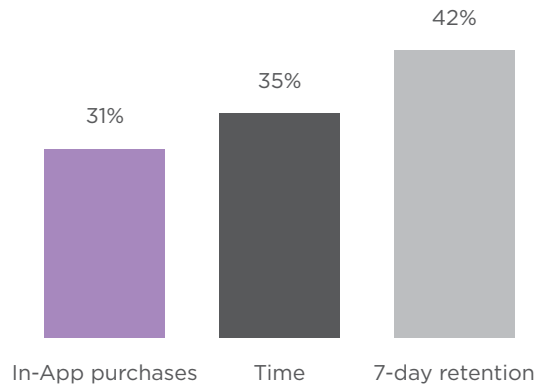
## GAMING, A MEN'S WORLD?

The cliché of the typical gamer as a teenage boy hooked on his game console playing shooter games is outdated. The availability of various types of games, which are available on multiple devices, has given rise to a diverse gaming audience. This trend shift is apparent in the Digimeter study: in 2011, 40% of the gamers were women, whereas in 2014, women now account for 48% of the gamers. A similar transition can be seen when it comes to age, with 27% of gamers being older than 50 in 2011 versus 32% in 2014.

A 2014 research by Flurry also shows that women play more mobile games than men<sup>1</sup>. Not only are women making 31% more in-app purchases, they spend 35% more time playing mobile games and are more loyal to their games (as evidenced in the higher 7-day retention rate: the extent to which games are still played seven days after the game is played for the first time).

GAMES

### FEMALE GAMERS OVER-INDEX VS MALES ON TIME, MONEY AND LOYALTY



Graph 46: Over-index female versus male gamers on in-app purchases, time and 7-day retention ("Mobile Gaming: Females Beat Males on Money, Time and Loyalty" by Flurry (Yahoo!), Aug 2014)

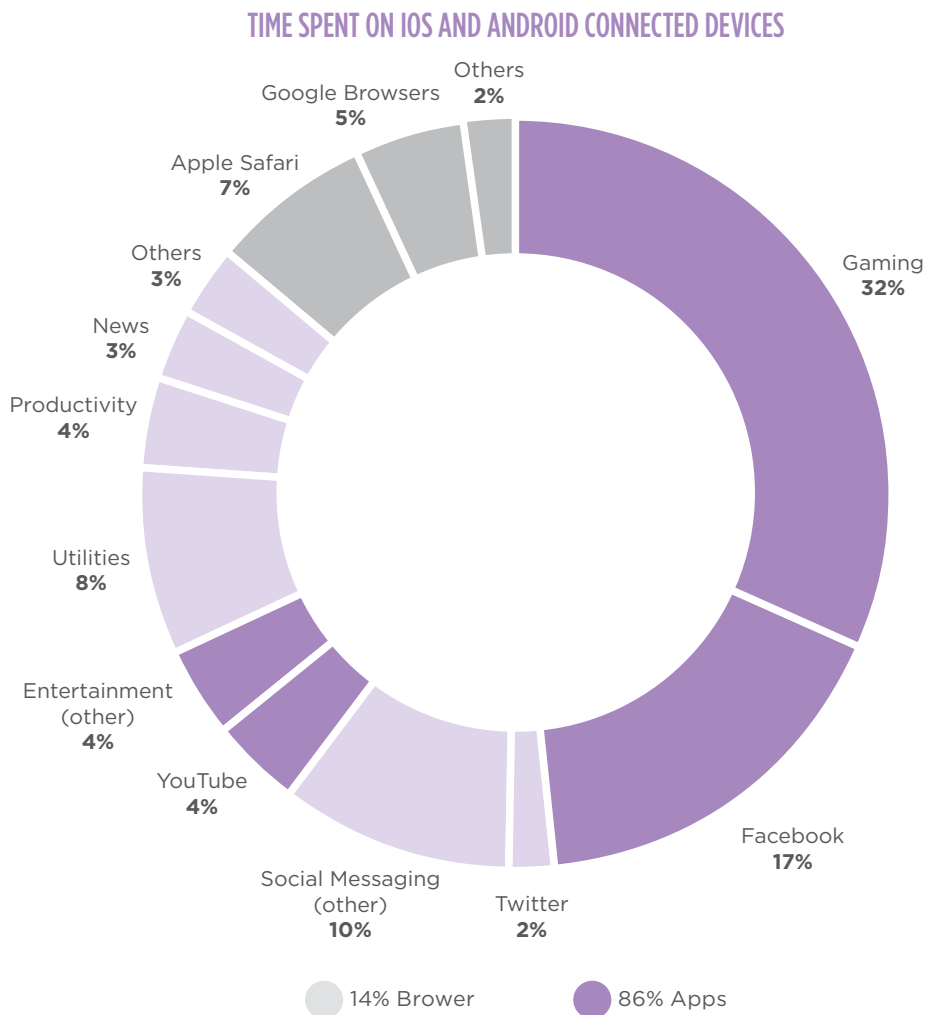
<sup>1</sup> Flurry (Yahoo!), Aug 2014, "Mobile Gaming: Females Beat Males on Money, Time and Loyalty", retrieved from: <http://www.flurry.com/blog/flurry-insights/mobile-gaming-females-beat-males-money-time-and-loyalty#VGMrsvnF98E>

The same study also shows that the dominance of female versus male gamers depends on the genre of games. Of the 19 genres included in the survey, 9 genres are more played by female gamers (especially simulation games, solitaire, casino games, bubble shooters and social turn-based games), 6 are more played by male gamers (battle games, action/role playing games, shooters, strategy games and sports games), and 4 are gender-neutral (puzzles, racing, platform-games and arcade games).

Time spent per user per week on the Flurry platform (“Mobile Gaming: Females Beat Males on Money, Time and Loyalty” by Flurry (Yahoo!), Aug 2014)

The broader audience that mobile games are attracting (compared to classic console games) presents an opportunity for advertisers.

The Digimeter study highlights this opportunity by zooming in on the frequency of the target market’s usage. 45% of the Flemings played a game on their mobile phones or tablets in the last month. Moreover, making an extrapolation from a US-based study by Flurry, 32% of the time spent on mobile devices is dedicated to gaming<sup>2</sup>.



Graph 47: Time spent on iOS and Android Connected Devices  
 (“Apps Solidify Leadership Six Years into the Mobile Revolution”, by Flurry (Yahoo!), April 2014)

GAMES

<sup>2</sup> Flurry (Yahoo!), April 2014, “Apps Solidify Leadership Six Years into the Mobile Revolution”,  
 retrieved from: [http://www.flurry.com/bid/109749/Apps-Solidify-Leadership-Six-Years-into-the-Mobile-Revolution#.VGMag\\_nF98F](http://www.flurry.com/bid/109749/Apps-Solidify-Leadership-Six-Years-into-the-Mobile-Revolution#.VGMag_nF98F)



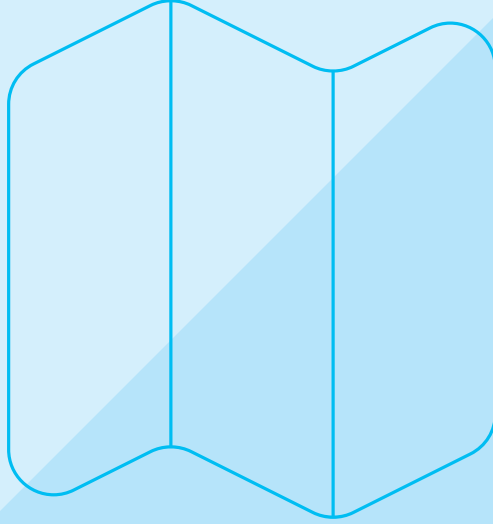
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# CHAPTER 07

TRADITIONAL MEDIA

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TRADITIONAL MEDIA



CHAPTER 07

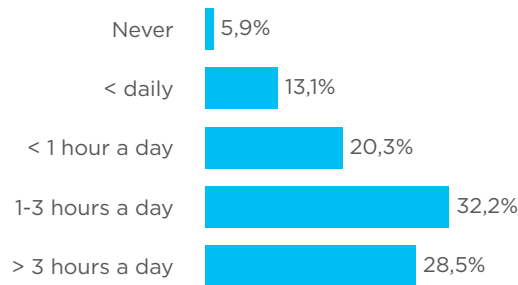




# RADIO

- 81,0% indicate that they listen to the radio on a daily basis (via any kind of device).
- Over half of the Flemings report listening to the radio in their car or at home on a daily basis.
- Internet radio is for one out of ten Flemings a daily recurring habit.

## FREQUENCY OF LISTENING TO THE RADIO



Graph 48: Frequency of listening to radio (N=2.028)

## LISTENING TO RADIO THROUGH DIFFERENT DEVICES

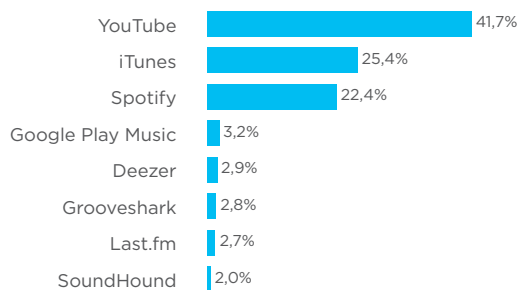
	EVER	MONTHLY	DAILY	EVOLUTION DAILY 2014-2013
Car radio	83,3%	76,4%	53,5%	+1,2
Radio at home	81,7%	68,8%	51,1%	-4,0
Internetradio	49,0%	29,4%	10,1%	+1,1
MP3 player	36,5%	22,9%	9,3%	+0,9

Table 40: Frequency of using different devices to listen to radio (N=2.028)

# MUSIC

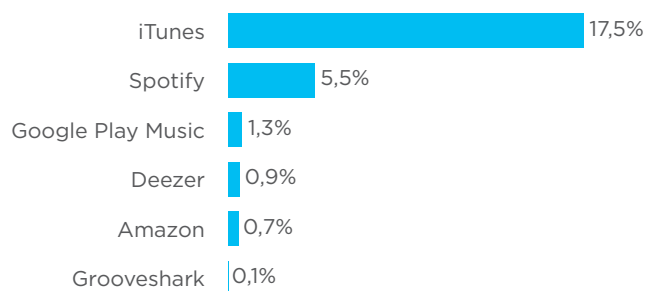
- 56,3% of the Flemish population reports that they consumed online music in the last month.
- YouTube is by far the most popular online source for music (41,7%).
- Men and people in younger age categories are more likely to use online music channels.
- Less than one in four Flemings (22,6%) report that they also pay for online music via the suggested music channels (either buying music or having a paid subscription).
- If people pay for online music, it is most likely via iTunes (17,5% of the population).
- Spotify grew in terms of use, as 22,4% of the Flemings have used Spotify in the last month (+3,3)\*. The willingness to pay is also higher, with 5,5% claiming to pay for music via Spotify (+0,8)\*.

## USING DIFFERENT ONLINE MUSIC CHANNELS



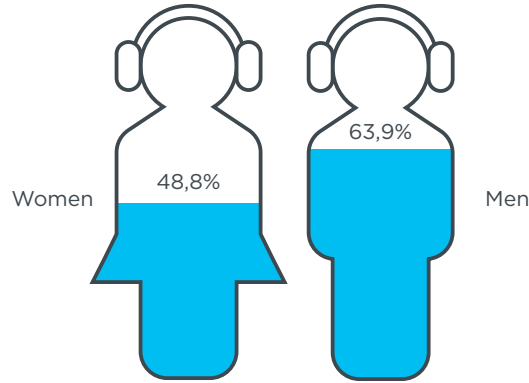
Graph 49: Use of using different online music channels in last month (N=2.028)

## PAYING FOR MUSIC ON DIFFERENT ONLINE MUSIC CHANNELS



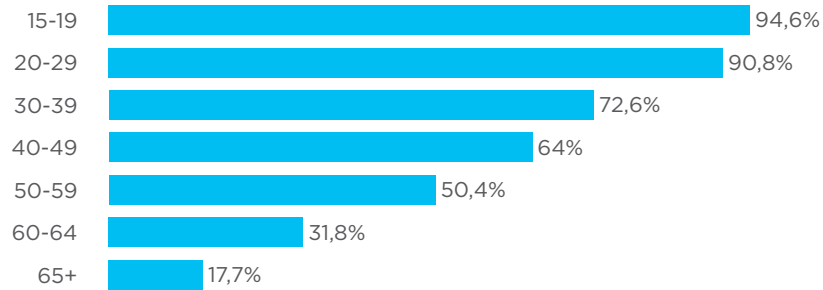
Graph 50: Frequency of paying for music on different online music channels (N=2.028)

### BREAKDOWN BY GENDER FOR ONLINE MUSIC CHANNEL USAGE (P=.000)



Graph 51: Breakdown by Gender for Online Music Channel Usage (N=2.028).  
A p-value of less than .05 indicates a statistically significant difference, in this case between men and women.

### BREAKDOWN BY AGE FOR ONLINE MUSIC CHANNEL USAGE (P=.000)



Graph 52: Breakdown by Age for Online Music Channel Usage (N=2.028).  
A p-value of less than .05 indicates a statistically significant difference, in this case between age groups.

# NEWS

- Radio (65,8%), national television (60,1%) and computer (40,8%) are the sources most commonly used on a daily basis to consume news.
- News consumption habits seem to uphold compared to last year. Reading a newspaper, for instance, is still a daily habit for 37,4% of the respondents (-1,3)\*. However, we do see a significant increase in the use of mobile devices, such as tablets (+8,8)\* and smartphones (+7,6)\*, to consume news.
- Reading newspapers and watching regional TV news is not age-related. For other news channels, news consumption is correlated to the following age categories:
  - News on tablet: age 30-49
  - News on mobile phone: younger than 39
  - News on computer: age 20-39
  - News on national TV: age 30-64
  - News on radio: age 20-64
- Reading newspapers does not differ significantly between men and women. The other sources (such as tablet, mobile phone, computer, TV and radio) are more likely used by men than by women.
- If we look into detail at the digital newssources, visiting newssites is most popular (74,2% have visited a news website last month), mainly by means of a computer.

## DIFFERENT SOURCES FOR FOLLOWING THE NEWS

	EVER	MONTHLY	DAILY	EVOLUTION DAILY (2014-2013) <sup>1</sup>
Radio	89,7%	79,4%	<b>65,8%</b>	-0,2
National television	87,2%	79,9%	<b>60,1%</b>	+1,2
Desktop/laptop	76,0%	63,0%	<b>40,8%</b>	-1,7
Newspaper	81,7%	58,9%	<b>37,4%</b>	-1,3
GSM/Smartphone	52,6%	39,7%	<b>24,3%</b>	+7,6
Tablet	52,5%	40,3%	<b>23,3%</b>	+8,8
Regional television	73,9%	46,2%	<b>20,8%</b>	-0,3

Table 41: Different sources for following the news (N=2.028).

<sup>1</sup> The formulation of this question has been adapted compared to last year. Therefore, the comparison between the figures of 2014 versus 2013 for this topic should be considered with caution.

## BREAKDOWN BY AGE FOR THE USAGE OF DIFFERENT NEWS SOURCES

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Newspaper (p=.644)	81,8%	82,1%	75,6%	84,8%	83,6%	86,5%	80,2%	<b>81,7%</b>
Tablet (p=.000)	58,6%	60,1%	66,1%	71,3%	51,2%	36,9%	28,3%	<b>52,6%</b>
GSM/ Smartphone (p=.000)	76,5%	79,0%	76,9%	63,6%	44,2%	35,0%	15,3%	<b>52,6%</b>
Desktop/laptop (p=.000)	84,2%	93,7%	92,0%	87,2%	75,8%	72,3%	43,7%	<b>76,0%</b>
Desktop/laptop (p=.004)	86,2%	86,3%	90,3%	91,4%	90,2%	90,5%	79,7%	<b>87,3%</b>
Regional television (p=.126)	72,4%	66,0%	72,9%	76,9%	79,3%	80,8%	71,2%	<b>73,9%</b>
Radio (p=.000)	84,0%	92,5%	92,4%	96,2%	90,9%	91,3%	81,4%	<b>89,7%</b>

Table 42: Breakdown by Age for the Usage of Different News Sources (N=2.028).  
A p-value of less than .05 indicates a statistically significant difference, in this case between age groups.

## BREAKDOWN BY GENDER FOR THE USAGE OF DIFFERENT NEWS SOURCES

	MEN	WOMEN	TOTAL
Newspaper (p=.085)	83,2%	80,3%	<b>81,7%</b>
Tablet (p=.000)	61,4%	44,2%	<b>52,6%</b>
GSM/Smartphone (p=.000)	62,5%	43,1%	<b>52,6%</b>
Desktop/laptop (p=.000)	84,2%	68,1%	<b>76,0%</b>
National television (p=.000)	92,6%	82,2%	<b>87,3%</b>
Regional television (p=.001)	77,3%	70,5%	<b>73,9%</b>
Radio (p=.000)	92,7%	86,9%	<b>89,7%</b>

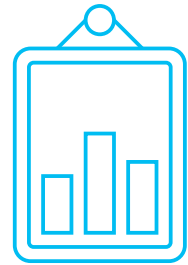
Table 43: Breakdown by Gender for the Usage of Different News Sources (N=2.028).  
A p-value of less than .05 indicates a statistically significant difference, in this case between men and women.

## DIGITAL NEWS SOURCES USED DURING THE LAST MONTH

	COMPUTER	SMART-PHONE	TABLET	NOT USED
Newssite	60,9%	31,2%	30,1%	25,8%
Digital newspaper (eg., PDF-version)	19,2%	8,5%	18,3%	63,8%
Social media	43,1%	30,8%	22,5%	44,1%
Search engine (eg., Google)	55,3%	27,4%	27,2%	36,8%

Table 44: Digital news sources used on different devices during the last month (N=2.028)

# FRAMING THE DATA



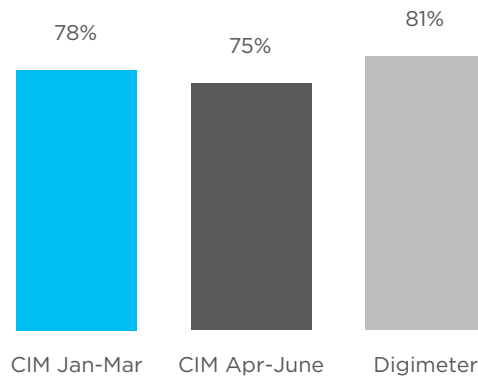
## RADIO

In the Digimeter report, 81% of the respondents claimed to listen on a daily basis to the radio. In an analysis of VAR (the advertising sales house of VRT), based on the CIM Radio survey of April-June 2014, radio reaches 75% of the Flemings each day<sup>1</sup>. This is 3 percentage points lower than the previous wave (January-March 2014).

According to both Digimeter and the CIM Radio Survey, 51% of the Flemings listen on a daily basis to the radio at home. However, regarding the proportion listening to the radio in the car per day, there is a difference between both studies. Digimeter reports that 54% of the Flemings listen to the car radio every day, whereas CIM reports that only 40% listens to the car radio on a daily basis. This difference is not only due to methodological differences (the CIM survey is based on a diary study), but probably also to the definition of the population (the VAR analysis on the CIM data is based on Flemish population aged 12+, the Digimeter survey is based on the Flemish population aged 15+), as the lowest frequency for listening to the radio in the car is found amongst the youngest age group.

TRADITIONAL MEDIA

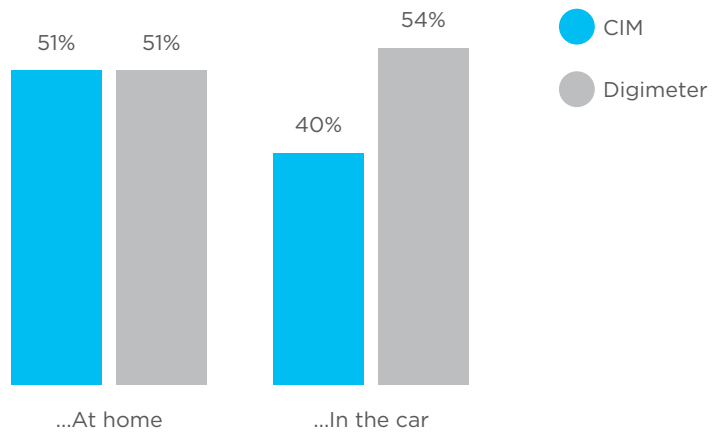
### DAILY LISTENING TO THE RADIO



Graph 53: % of Flemings listening to the radio on a daily basis (CIM Radio study Jan-Mar 2014 and Apr-June 2014, versus Digimeter 2014). Figures of CIM Radio Study provided by VAR.

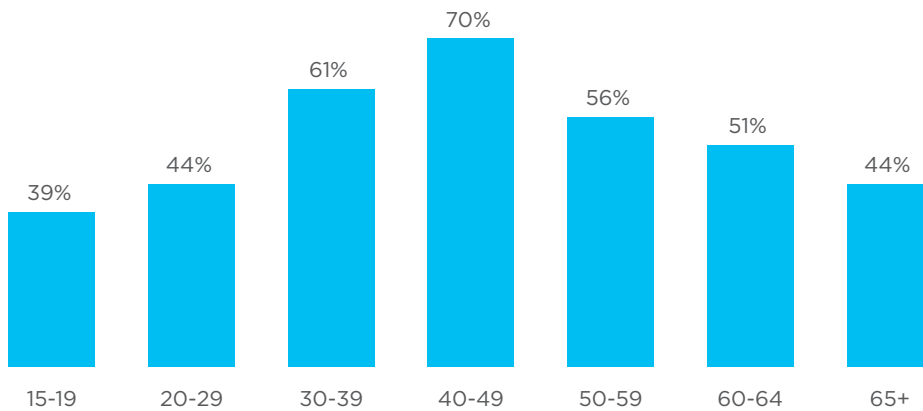
<sup>1</sup>VAR, Aug 2014, "CIM Radio 2014 W2 - CIM luistercijfers april-juni 2014", retrieved from: [http://www.var.be/files/Docs/Publicaties/e-Varia/e-Varia\\_FlashCIM\\_2014\\_2c/CIM\\_analyse\\_2014W2\\_NL.pdf?download=true](http://www.var.be/files/Docs/Publicaties/e-Varia/e-Varia_FlashCIM_2014_2c/CIM_analyse_2014W2_NL.pdf?download=true)

## DAILY LISTENING TO THE RADIO



Graph 54: % of Flemings listening to the radio on a daily basis at home versus in the car (CIM Radio study Apr-June 2014, versus Digimeter 2014). Figures of CIM Radio Study provided by VAR.

## DAILY LISTENING TO CAR RADIO (DIGIMETER 2014) PLOTTED BY AGE



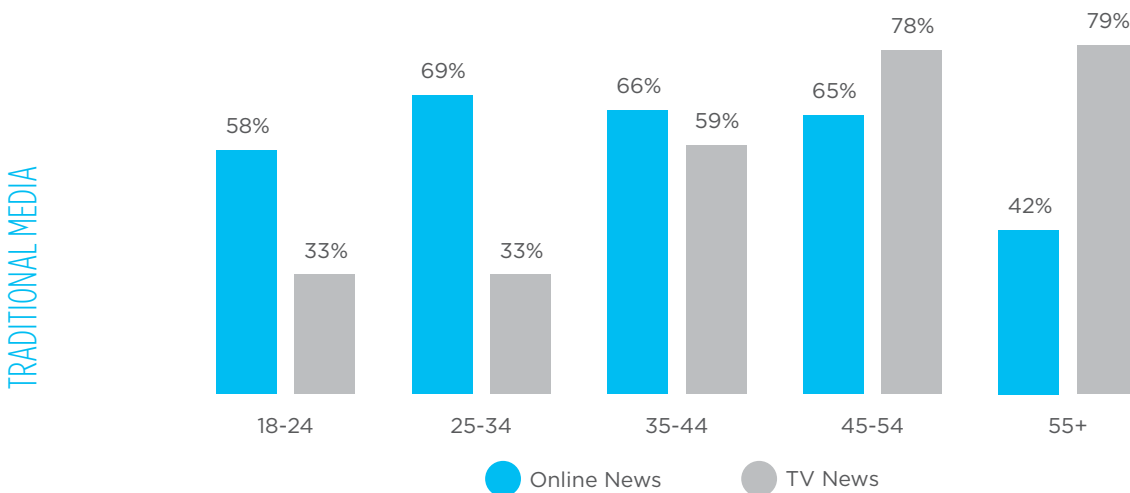
Graph 55: Breakdown by age of listening to the car radio on a daily basis (Digimeter 2014).

## NEWS

The type of news source people use varies with the age of the consumer. Online news is more likely to be consumed by 25-54 year old individuals, whereas TV news reaches its peak among the older segments (45+). The same trend appeared in the Digital News Report 2014 of the Reuters Institute for the Study of Journalism at Oxford University<sup>2</sup> which surveyed the digital news habits of ten countries: USA, UK, Germany, France, Denmark, Finland, Spain, Italy, Brazil and Japan.

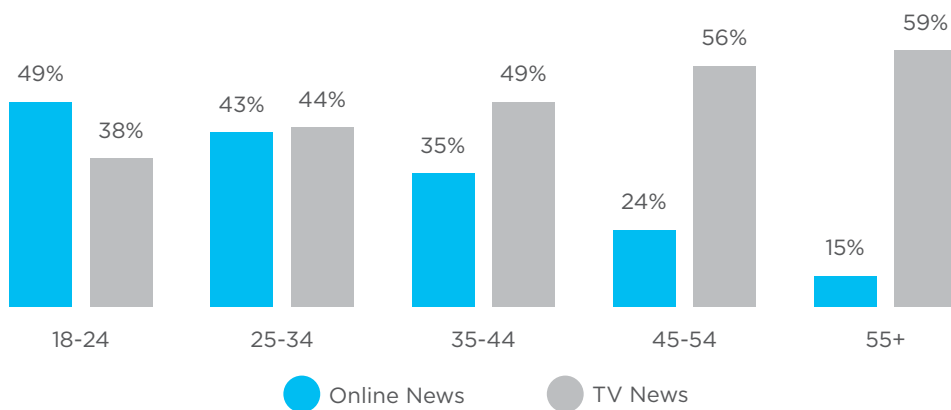
There is however a remarkable difference between the Digimeter Study and the Reuters Digital News Report 2014. In the latter, the older segments (45+) have a stronger preference towards TV news over online news, especially in comparison with the younger categories. In the Digimeter study the preference is less pronounced among older segments but in the younger age categories there is a stronger preference towards online news. This indicates that online news has a wider audience in Flanders compared with other countries.

### DIGIMETER 2014: DAILY USE OF ONLINE NEWS VERSUS TV NEWS PLOTTED BY AGE



Graph 56: Breakdown by age on consuming online news versus TV news on a daily basis in Flanders (Digimeter 2014).

### REUTERS 2014: WEEKLY MAIN SOURCE OF NEWS (ONLINE VERSUS TV) PLOTTED BY AGE

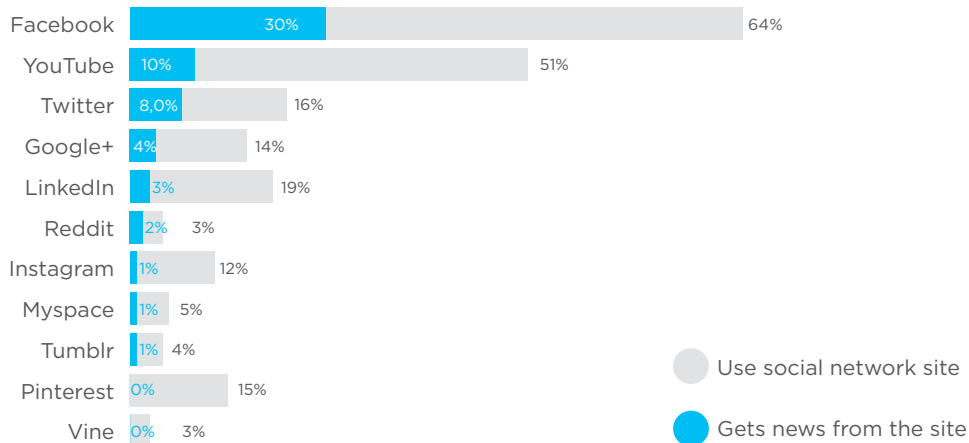


Graph 57: Breakdown by age on consuming online news versus TV news on a weekly basis in ten countries (USA, UK, Germany, France, Denmark, Finland, Spain, Italy, Brazil and Japan) (Reuters Digital News Report 2014).

Reuters Institute for the Study of Journalism at Oxford University, June 2014, "Digital News Report 2014", retrieved from: <http://www.digitalnewsreport.org/>

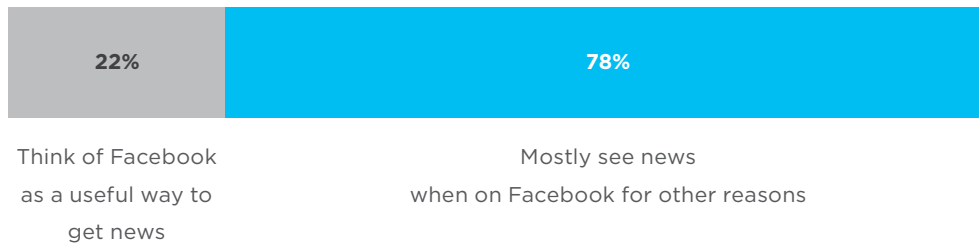
56% of the Flemings reported that they have used a social network to consume news during the last month, an increase of almost 12 percentage points compared to last year. The Pew Research Center provided a breakdown per social network for the US<sup>3</sup>. Half of the Facebook and Twitter users get news from these networks; for YouTube this is only one in five. Interesting to note is that of those 30% who gets news from Facebook, only 22% intended to find news updates. The other 78% ‘accidentally’ encountered news updates while visiting the site for other purposes. Serendipity is still an important factor in social media as news distributors.

### PERCENT OF US ADULTS WHO USE EACH SOCIAL NETWORKING SITE AND PERCENT OF US ADULTS WHO GET NEWS FROM EACH SOCIAL NETWORKING SITE



Graph 58: Note: The percent of US adults who get news on Pinterest and Vine each account to less than one percent. Facebook News Survey, Aug. 21-Sept. 2, 2013 (N=5,173)

### OF THE 30% OF US ADULTS WHO CONSUME NEWS ON FACEBOOK...



Graph 59: Percent of US adults who use each social networking site and percent of US adults who get news from each social networking site (“8 Key Takeaways about Social Media and News”, Pew Research Center, March 2014).

TRADITIONAL MEDIA

<sup>3</sup>Pew Research Center, March 2014, “8 Key Takeaways about Social Media and News”, retrieved from: <http://www.journalism.org/2014/03/26/8-key-takeaways-about-social-media-and-news/>



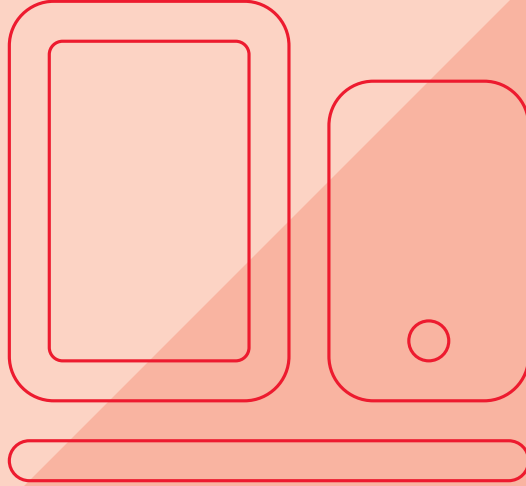
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# CHAPTER 08

GENERAL MEDIA USE

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GENERAL MEDIA USE



CHAPTER 08



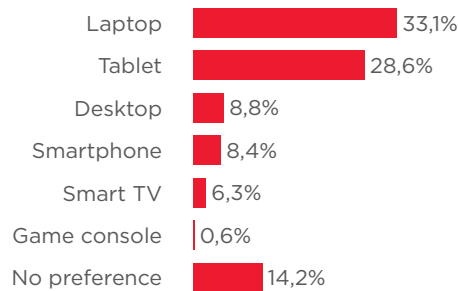


# GENERAL MEDIA USE

## INTENTION TO BUY MEDIA DEVICE

- When asked to make a choice on which media device they would most likely buy in the near future, most people answer they would prefer to buy a laptop (33,1%) or a tablet (28,6%). 14,2% has no preference.
- Laptops and smartphones are more preferred by the younger age groups, while tablets have the highest preference amongst 30-59 year olds.

### INTENTION TO BUY MEDIA DEVICE



Graph 60: Suppose you would buy a media device in the near future, which device would you prefer? (N=2.028)

### BREAKDOWN BY AGE FOR INTENTION TO BUY MEDIA DEVICE

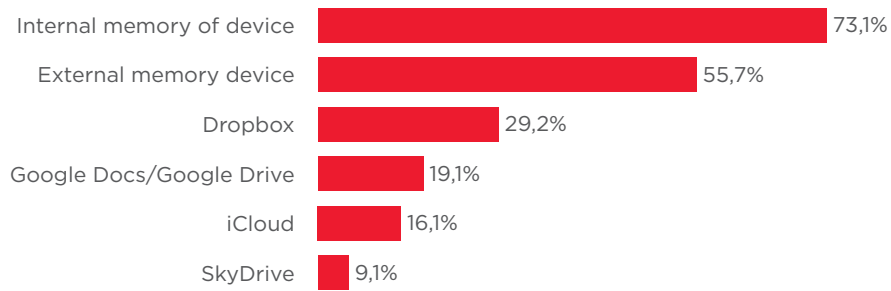
	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Laptop	46,7%	42,9%	34,5%	27,6%	32,9%	36,3%	25,1%	<b>33,1%</b>
Tablet	15,7%	22,4%	35,5%	37,6%	33,5%	27,5%	21,4%	<b>28,6%</b>
Desktop	3,4%	8,5%	8,4%	8,9%	9,7%	9,9%	9,8%	<b>8,8%</b>
Smartphone	21,1%	17,2%	7,6%	9,0%	5,5%	3,7%	2,6%	<b>8,4%</b>
Smart TV	6,9%	4,4%	4,9%	5,8%	5,6%	6,0%	9,5%	<b>6,3%</b>
Game console	0,5%	1,6%	1,4%	0,7%	0,0%	0,3%	0,0%	<b>0,6%</b>
No preference	5,7%	3,0%	7,7%	10,4%	12,9%	16,1%	31,6%	<b>14,2%</b>

Table 45: Suppose you would buy a media device in the near future, which device would you prefer? Breakdown by age (N=2.028)

## STORAGE OF DATA: PHYSICAL STORAGE VERSUS CLOUD APPLICATIONS

Most people still use physical drives to store data. 73,1% have used their devices' hard drives, and 55,7% have used external devices (eg., USB-stick, external hard disk). Additionally, Dropbox is the most commonly used cloud storage application.

### STORAGE OF DATA: PHYSICAL STORAGE VERSUS CLOUD APPLICATIONS



Graph 61: Which of the following data storage locations have you used last month?(N=2.028)

## PREFERRED DEVICE FOR DAILY INTERNET ACTIVITIES

For most internet-related tasks, computers (laptop or desktop) remain the most commonly used devices on a daily basis. However, when it comes to playing games and social networking, mobile devices are preferred (respectively tablets and smartphones).

### PREFERRED DEVICE FOR DAILY INTERNET ACTIVITIES

	<b>COMPUTER</b> (N=1.875)	<b>TABLET</b> (N=1.131)	<b>SMART- PHONE</b> (N=1.163)
Reading/sending e-mails	77,6%	52,5%	65,0%
Searching info	70,8%	46,3%	44,3%
Social network sites	52,1%	40,1%	56,6%
Visiting newssites	48,5%	37,4%	37,1%
Playing games	13,6%	24,3%	17,2%
Streaming music	10,0%	5,6%	7,1%
Online banking	7,9%	4,8%	4,1%
Live internet-radio	7,5%	4,7%	4,6%
Downloading movies or series	4,6%	1,4%	0,3%
Streaming movies or series	4,5%	2,9%	2,3%
Making online phone calls (eg., Skype, Facetime)	4,1%	2,4%	2,6%
Downloading music	4,1%	2,1%	1,7%
E-commerce (buying or selling online)	1,5%	1,2%	0,9%
Podcast (streaming or downloading a previously aired radioshow)	0,7%	1,1%	1,2%

Table 46: Daily use of computer vs tablet vs smartphone on different activities (on people owning the devices)

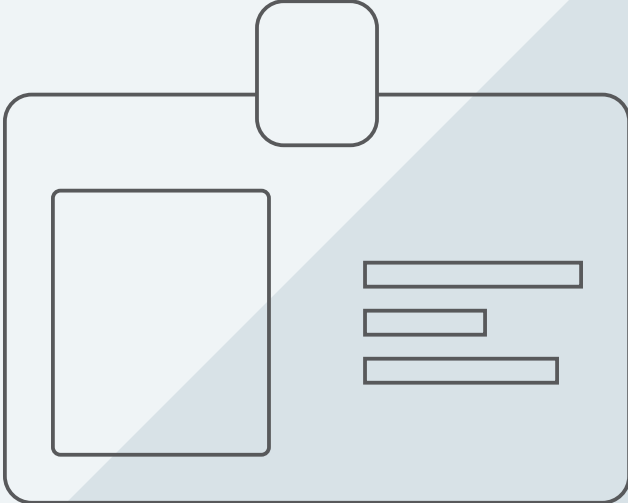


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# PROFILES

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PROFILES



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# PROFILES

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Like previous waves, we conclude this report with an overall segmentation of the Flemish media consumer. This segmentation is based on two factors pertaining to the consumers' usage of the following technologies and devices: TV, computer, internet, tablet, smartphones, social network sites, games, radio, music and news.

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

The cluster analysis<sup>1</sup> resulted in five different profiles, which are comparable to the profiles that appeared in the study last year. However, we do see some remarkable shifts in sizes:



## ONLINE MEDIA MASTER (21,0%).

This segment is identical to the Online Media Masters in the previous wave (13,7%). This is the youngest profile, 'omnidigital' in terms of the amount and diversity of digital media content they consume, but rather limited in monetary content expenditures and in the number of screens they use – due to limited resources. This segment displays the potentially most disruptive tendencies, since the lion's share of their overall media consumption is shifting online, and gets concentrated on laptops and smartphones. This segment has grown significantly compared to last year.



## MEDIA OMNIVORE (22,1%).

This profile is comparable to the Media Innovators in the previous wave (19,0%). Like the Online Media Masters, they are equally or even more 'omnidigital' in terms of a broad experience with and interest in digital media consumption. Contrary to Online Media Masters they own a much broader diversity of devices and technologies as they have more financial resources and they display the highest willingness to pay for digital media content. However, their digital consumption is not necessarily cannibalizing traditional ways of consuming media. Their digital consumption of news, television, music, etc. is just an extra layer that adds flexibility on top of their consumption of traditional broadcasting, newspapers, radio, etc. Compared to last year, this group has slightly grown, probably due to inflow from other segments like the Online Media Masters.

<sup>1</sup> For this analysis, a K-means cluster analysis was used, based on 8 variables measuring the variety of use and 6 variables measuring the frequency of use, to construct 5 segments.



### **DIGITAL EXPLORERS (24,5%)**

show similarities with the Digital Gentlemen in the previous wave (16,7%). This segment has access to a broad diversity of digital media devices and technologies, but has not developed strong digital media consumption habits yet. They are fully exploring and experimenting with digital media consumption. Compared to last year this segment grew significantly, mainly due to a group of elderly people that started to explore digital news consumption on top of traditional media consumption (which is still the reference point for them). The tablet is triggering the highest degree of exploration among this segment.



### **FUNCTIONAL MEDIA USER (18,8%)**

This profile is similar to the Instrumental Media Users in the previous wave (27,6%). Just as with the 'Digital Explorers', traditional media consumption is still the reference point for them, but contrary to the latter, they are less triggered by digital media and they don't feel the need to explore. Access to digital technologies is not the issue, but they will only use them if necessary. Their digital media consumption mainly consists of office-applications and e-mailing, but rarely will they use technologies for media and entertainment purposes. This segment declined by 8.8 percentage points compared to last year.



### **ANALOGUE MEDIA FANS (13,6%)**

are comparable to the Traditional Media Fans in the previous wave (23,0%). However, the Analogue Media Fans tend to be even more reluctant towards anything related to new media and technologies. Just like last year, this is the oldest of the five segments, but remarkably decreasing in 'size', which indicates that even in the eldest segments, people start exploring and adopting digital ways to consume media (mainly news consumption), and evolving to Digital Explorers or Functional Media Users.

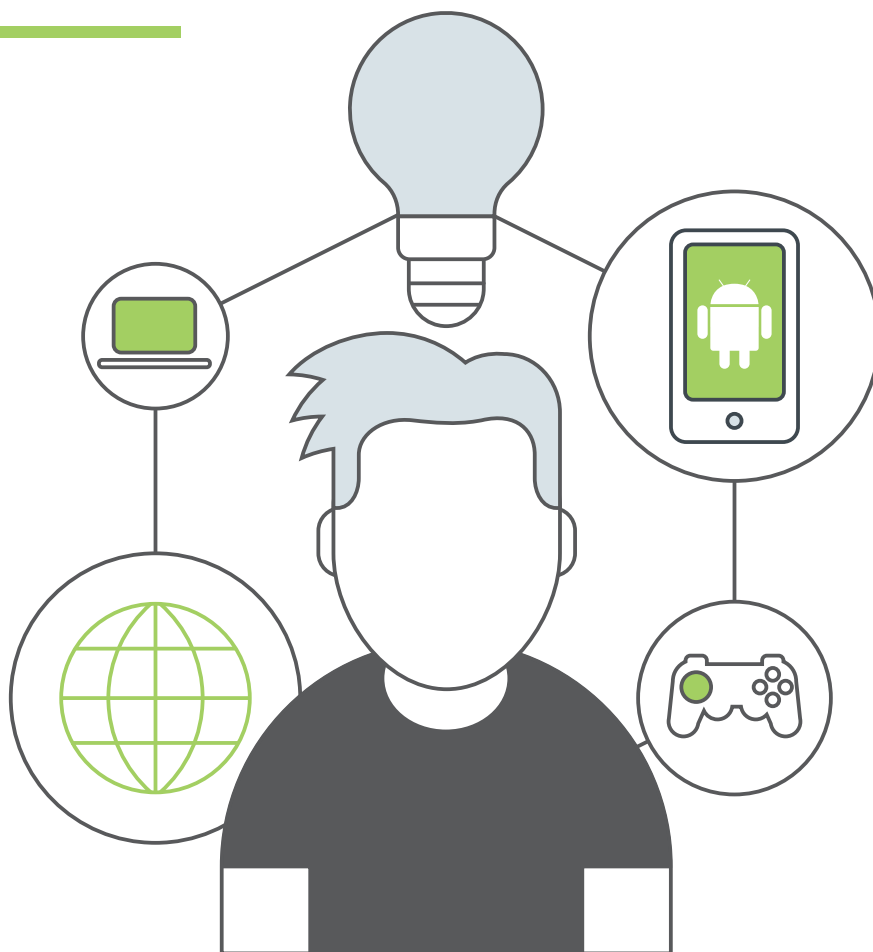
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# ONLINE MEDIA MASTER

(21,0%)

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ONLINE MEDIA MASTER



This is the segment that has made the switch from analogue media to digital media the most. A group of youngsters of which a large part of their media consumption is clearly switching to an online environment on mobile devices as laptop and smartphone. Compared to last year this group grew significantly from 14% to 21%. As Online Media Masters are mainly students with no income, or junior white-collar workers with lower to average income, -more than other segments- they have to consider on what devices and services they want to spend their money. Therefore, they focus on a couple of devices (mainly a laptop and a smartphone), and they show a lower willingness to pay for content and for apps. Despite the lower expenditures and the smaller diversity of devices, they consume huge amounts of diverse media (functionalities).

## SOCIO-DEMOGRAPHIC

Online Media Masters are mostly younger than thirty. Men and women are equally represented within this group. This segment has the highest proportion of students, still living with their parents, and having no own income. Another important subgroup are the freshly-graduated people, who have just moved out of their parental house and live together with their partner, and earn a low to average wage as a white-collar worker.

## DEVICES

Online Media Masters tend to have three devices, mainly a TV, laptop and smartphone. A tablet is a device less commonly possessed. However, when asked which device they would prefer to buy in the next couple of months, a tablet is the second-most reported device (with a laptop on the first place).

## TV

The adoption of Smart TV's and streaming devices like Apple TV or Bhaalu are lower than within Digital Explorers or Media Omnivores. Even though the device that is most frequently used to consume TV content is still the television set, there is a remarkable shift from the TV-set towards the laptop. Whereas the daily use of a TV set to watch television is amongst the lowest of all profile segments, the daily use of a laptop to watch TV is clearly amongst the highest. This is reflected in a high frequency of watching streamed content online.

Eén and VTM are the favorite television channels, but this profile also has the highest scores on Vier (a shared first place with Media Omnivores).

Over 8 out of 10 Online Media Masters engage in internet activities while watching TV, mainly on their laptops. When they share opinions about a program, this is most likely done on Facebook. When they engage in actions not related to the program, they also tend to use their smartphones, albeit still to a lower extent than the use of laptops.

Compared to Digital Explorers and Media Omnivores, the adoption of Smart TV's and streaming devices (e.g. Apple TV or Bhaalu) are lower for Online Media Masters.



## COMPUTER AND INTERNET

The computer (especially the laptop) is by far the most favorite device of the Online Media Masters. Everyone has an internet connection at home, and they use their computers for a high diversity of tasks. Social media, chatting, visiting news sites and gaming are activities that are most typical for this profile. Downloading films/series and music are common activities for Online Media Masters and, typically for this segment, those are mainly illegal downloads.

## TABLET

The adoption of tablets is remarkably low, with only 1 in 5 having a tablet in their household. If they do own a tablet in their household, it is most likely an Android device and used by their parents.

## TELEPHONY

A smartphone is a common device for an Online Media Master to own, with 7 in 10 in possession of one. As they don't have a lot of money to spend, providers that are generally perceived as cheaper such as Base and Mobile Vikings tend to be very popular. Most smartphones within this segment are Android-based and WiFi is the most common internet connection. They use their smartphones for a variety of internet-related tasks - the most typical being social media, gaming and news. SMS is still the most frequently used texting method, but web-based messaging apps are also often used (especially Facebook Messenger and Snapchat).

1 in 5 has paid for apps in the last twelve months, and compared to Digital Explorers, they tend to spend slightly more on in-app purchases. This is not at all surprising, knowing that the so-called freemium business model is a popular model within game apps (where the installation of the app and playing the game is free, but you can unlock some features by in-app purchases).

## SOCIAL MEDIA

Social media is an important aspect of the digital life of Online Media Masters. They tend to actively use two or three social network sites (Facebook, YouTube and Twitter or Google+), with 3 in 4 using Facebook on a daily basis. Instagram is also a typical social network for this profile.

## GAMES

This segment contains the highest number of heavy gamers, with 6 in 10 playing games every day. Gaming is mainly done on a computer or a smartphone, but they also have high adoption rates of fixed game consoles (42%) and portable consoles (23%).

## TRADITIONAL MEDIA

Compared to other profiles, Online Media Masters are moderate radio consumers. If they do listen, Studio Brussel and Q-Music are their favorite radio stations. YouTube is by far the most popular online music source for Online Media Masters. They show a low willingness to pay for digital music.

News consumption is mainly performed on a computer, mostly by visiting news websites (HLN.be is the most popular one), using general search engines like Google or Bing, and via social media.

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# MEDIA OMNIVORE

(22,1%)

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MEDIA OMNIVORE



Media Omnivores are the most dominant users of all types of media. As this segment reports the highest income, they also have the most money to spend on digital technologies and content. This is apparent in the devices they own as well as in their willingness to pay for apps or services. They also master every device and service they own, as reflected in the functionalities they use.

## SOCIO-DEMOGRAPHIC

Media Omnivores are mostly men between 20 and 50 years old. They are highly educated (Bachelor, Master or Post-university level), and have average to high incomes.

This segment has the highest proportion of C-level managers and they mostly live in relatively large households, together with their partners and one to three children.

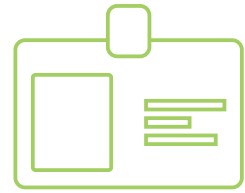
## DEVICES

Media Omnivores have at least 4 screens in their household (5 if they still own a desktop). They have the highest adoption rates for new media devices such as Smart TV, streaming devices (Apple TV, Google Chromecast, Bhaalu), tablets, smartphones and game consoles. While a new tablet or laptop is most likely the next device they will purchase, they also show the highest preference towards purchasing smartphones – illustrating their desires to always have the newest models available in the market.

## TV

Over 40% of the Media Omnivores own a Smart TV at home, which is the highest adoption rate among all segments. Like the Digital Explorers, they display a diversified daily use of digital TV functionalities such as the usage of the Electronic Program Guide, skipping commercials and recording programs. Compared to the Digital Explorers, the practice of setting reminders is less common among the Media Omnivores. This can be attributed to their differences in viewing habits. Digital Explorers prefer watching live television (making reminders useful), whereas Media Omnivores most frequently use alternative ways for consuming TV content such as time-shifted viewing or online streaming (via websites or via apps).

The favorite TV stations of Media Omnivores are Eén and Canvas, but interestingly they also have the highest preference for 2BE and Vier, with the latter being highly-watched among Online Media Masters, as well. Media Omnivores enjoy watching TV content, as evidenced in their consumption of TV content on multiple devices (e.g. TV set, computer, tablet and smartphone). Additionally, almost everyone engages in internet activities while watching TV. They like to share their opinion about TV programs, mainly via Facebook or Twitter. Searching for extra information about the program is mainly done on a tablet, and browsing to the website of the program is done both on a tablet and a computer. For other internet activities not related to the programs they're watching, Media Omnivores tend to use their smartphones.



## COMPUTER AND INTERNET

All Media Omnivores have an internet connection at home, and display the highest frequency of use on every computer-related activity, except for gaming, which is more frequently done by Online Media Masters. Downloading films/TV series and music are both common practices amongst Media Omnivores. However, there is a remarkable difference in how they source the content. Whereas music is mainly downloaded on a legal basis, films or series are downloaded illegally.

## TABLET

All Media Omnivores have access to at least one tablet in the household, most commonly the iPad which they use frequently. They are also most likely to own more than one tablet. In addition, Media Omnivores, among all profiles, demonstrate the highest willingness to pay for apps with 6 in 10 claiming to have spent money on apps in the last twelve months.

## TELEPHONY

Practically all Media Omnivores have a smartphone which, in contrast to the other segments, is almost just as likely to be an iPhone as an Android device. Proximus is the main provider for this segment, but Mobile Vikings is also popular in this segment, more so than with the other profiles, as Mobile Vikings' offering meets the mobile data needs of the Media Omnivores.

In connecting to the Internet, Media Omnivores regularly switch between the different possibilities to do so, depending on the situation and the location. They also display the highest variety of use - with e-mail and social media as the most frequently performed activities.

The most common form of texting remains SMS, but Media Omnivores also frequently use web-based messaging apps. Their willingness to pay for apps is slightly lower for smartphone apps than for tablet apps, but still more than 50% of the Media Omnivores have paid for apps in the last twelve months.

## SOCIAL MEDIA

Everyone in the Media Omnivore segment has an account on at least one social network. On average, they frequently use 3 to 4 social media, mainly Facebook, Twitter, YouTube and LinkedIn. Facebook is very frequently used, with 86% visiting Facebook on a daily basis. 1 in 3 also uses Twitter on a daily basis, whereas LinkedIn and Google+ are typically less frequently used (only 1 in 8 reports visiting these social network sites on a daily basis). Not surprisingly, this segment agrees the most with the statement that they can't live a day without social media. Among all profiles, Media Omnivores also agree the most that they share more on social network sites than they did before, and that messages on social media could persuade them to watch or switch to a TV program.

## GAMES

Media Omnivores are medium to heavy gamers, with 50% playing games every day (Online Media Masters is the only other segment that plays even more games). They have a diverse set of devices on which they play games, but they mainly prefer playing on their tablets, smartphones and computers. Nonetheless, they are also more likely to possess a game console than any other profile, with over 50% owning a fixed game console, and a quarter of the segment owning a portable game console.

## TRADITIONAL MEDIA

Contrary to the 'regular radio device' being less popular within this segment, this is the segment with the highest frequency of listening to internet radio. Listening in the car is also popular within this segment. Their favorite radio station is by far Studio Brussel, followed by Radio 1 and Q-Music. However, this segment does not only rely on traditional radio stations to consume music. In fact, among all profiles, Media Omnivores have the highest frequency of using online music channels, most commonly YouTube, iTunes and Spotify. iTunes is the most preferred channel to pay for digital music.

News is important for this segment, and is consumed across different devices (mainly tablets, smartphones, computers and radios). The source of digital news is dependent on the device being used. The computer is the main device for using general search engines like Google or Bing to look up information about (trending) topics, or for visiting a news website (typical for this segment are the high preference scores for Standaard.be, DeMorgen.be and Tijd.be, and also for deredactie.be). Tablets are preferred for reading the online versions of a newspaper (being a pdf-version or a tablet-optimized version), and smartphones for accessing news via social media.

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# DIGITAL EXPLORER

(24,5%)

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DIGITAL EXPLORER



Digital Explorers are fond of their tablets and digital TVs. This segment displays a broader use of media than the Online Media Masters (who focus their media consumption on their computers), but is less all-round than the Media Omnivores. They do like digital media, but have less money to spend than the Media Omnivores.

## SOCIO-DEMOGRAPHIC

Digital Explorers are mainly between 40 and 60 years old. Men and women are equally represented in this group. Most of them have low to average incomes, and have jobs as blue-collar or white-collar workers, or as civil servants or teachers. They typically have obtained Higher Secondary or Bachelor degrees. They also tend to live together with their partners, and have either one or no children.

## DEVICES

Most Digital Explorers live in a quadruple screen household, mainly with access to a tablet, TV, laptop and smartphone. All Digital Explorers have a tablet in their household; and just as the Media Omnivores, this segment has a remarkable higher adoption rate of Smart TV's and streaming devices such as Apple TV, Google Chromecast or Bhaalu. Adoption of computers is more or less similar to the Media Omnivores and Online Media Masters (60% desktop and 85% laptop), but in terms of ownership of smartphones (6 out of 10) and game consoles (1 out of 8), they are still surpassed by Media Omnivores and Online Media Masters. A new tablet or laptop is most likely the next device they will purchase, and compared to the other segments, Digital Explorers report the highest preference for buying a Smart TV.

## TV

Watching TV is highly appreciated by the Digital Explorers. Almost everyone has a digital TV subscription, and they tend to use a high variety of digital TV functionalities. More than 50% of the Digital Explorers use the Electronic Program Guide and engage in ad skipping on a daily basis. More than the other segments, Digital Explorers use features such as setting reminders, listening to digital radio channels, and using internet applications on their digital television. 8 out of 10 watches television on a television set on a daily basis, mainly live or via time-shifted viewing. Majority report that their favorite TV channel is Eén. Compared to other segments, Digital Explorers are more likely to watch TV content on a tablet on a daily basis. Additionally, 7 out of 10 regularly use the internet while watching TV content - mostly through their tablets. Their internet activities center around visiting the program website and searching for additional information or footage about the program. They rarely participate in sharing their opinions about a TV program.



## COMPUTER AND INTERNET

Majority of the Digital Explorers have an internet connection at home. Their use of the computer is less varied than their use of digital TV and tablets. They rarely download films or TV series, but they are more familiar with downloading music. When they download media via the Internet, it is almost exclusively done on a legal basis.

## TABLET

Every Digital Explorer has a tablet in her/his household mainly an iPad. They really love their tablets, and use these more frequently than the Media Omnivores. The functionalities they use on a daily basis are diverse, but they mostly use their tablets for emailing and looking up information. It is also the profile with the highest frequency of playing games on a tablet. While 4 in 10 have paid for apps in the last 12 months, it is still lower compared to the Media Omnivores, where 6 in 10 have spent money on apps for tablet in the same period.

## TELEPHONY

Compared to tablets, smartphones are less popular amongst Digital Explorers, as 'only' 6 in 10 owns a smartphone in this segment (a number that is surpassed by Media Omnivores and Online Media Masters). While their tablets are most likely to run on iOS, Android is the preferred system for their smartphones. The segment connects to the internet mainly through WiFi. Digital Explorers are light users of smartphones and they show little variation in their daily activities. Their mobile subscription is most commonly part of a bundle at Telenet or Proximus. Messaging for example is almost exclusively done via SMS. Paying for smartphone apps is a less common practice than paying for tablet apps, as only 1 in 5 has paid for smartphone apps in the last twelve months. This is far less compared to Media Omnivores with more than 50% of the segment spending money on apps in the same period.

## SOCIAL MEDIA

Digital Explorers display a moderate use of social media. Less than 20% of the Digital Explorers have no account on any social network site - either because they are not interested in social media or they don't see the necessity of having an account. The Digital Explorers that are on social media, have logged in on at least one or two social media sites in the past month, most commonly Facebook and Google+. Their social media frequency remains low, with less than 50% visiting Facebook on a daily basis. In terms of privacy, 4 out of 10 agree that social media poses a threat to their privacy, making this segment the most concerned about privacy issues amongst all profiles together with the Functional Media Users.

## GAMES

Digital Explorers are also moderate gamers. 3 out of 10 play games on a daily basis mainly using their tablets. 1 in 4 owns a fixed game console that is connected to the TV and 1 in 8 has a portable game console.

## TRADITIONAL MEDIA

Digital Explorers are very keen on listening to the radio, especially in their cars or in their homes. Radio 2 and Radio 1 are the most popular radio stations for this group. Digital explorers also display a moderate use of online music channels, mainly YouTube and iTunes. Moreover, Digital Explorers show a willingness to pay for music on iTunes. Digital explorers consume news on a high frequency and use multiple sources, mainly radio, national TV, tablet and newspaper. On tablet, they mainly surf to news websites (especially HLN.be and Nieuwsblad.be are popular sites), or they use a general search engine like Google.

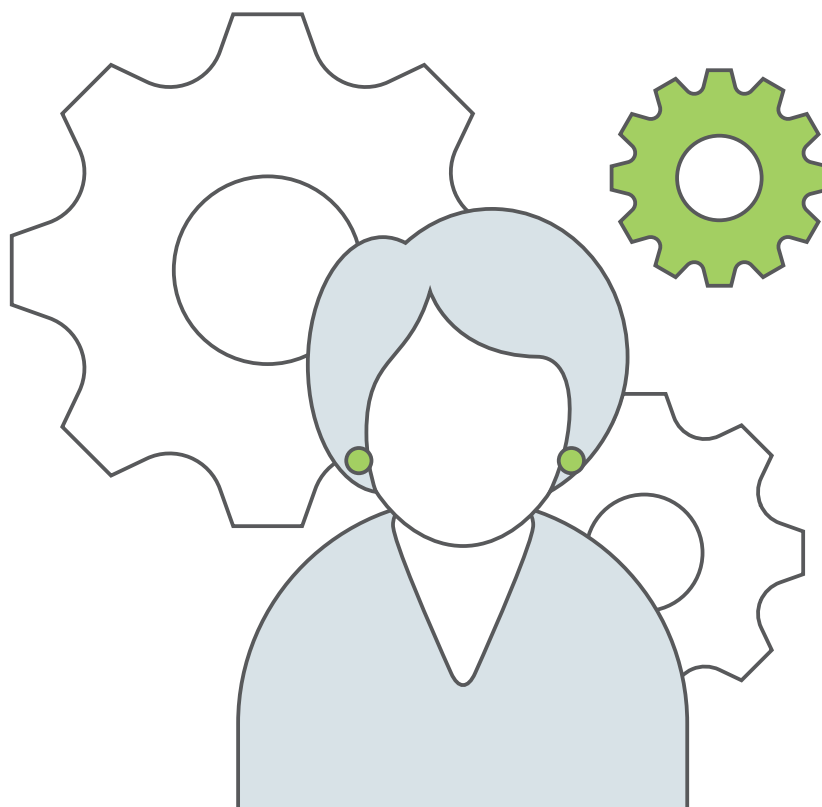
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# FUNCTIONAL MEDIA USER

(18,8%)

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FUNCTIONAL MEDIA USER



Functional Media Users are strict in the use of their devices and services. They use them only for a limited set of tasks ('digital if necessary'). Computers, for instance, are mainly used for office applications and e-mails, but rarely for entertainment purposes. This profile is also very unlikely to go on Facebook just to kill time. Functional Media users tend to be higher educated, which is reflected in their favorite TV channels, radio stations and news websites of choice.

## SOCIO-DEMOGRAPHIC

Functional Media Users are typically between 50 and 65 years old and the composition includes slightly more women. Civil servants, teachers and white-collar workers are highly represented within this group. They tend to be higher educated (having Bachelors or Master degrees), and have higher incomes. They generally live together with their partners, and either have one or no children.

## DEVICES

Functional Media Users most commonly have two to three devices – mainly a TV, laptop and desktop. Adoption of Smart TVs and streaming devices is low. Almost everyone has an internet connection at home, and adoption of laptops or desktops is high. A quarter of this segment owns a tablet, and 4 in 10 are smartphone owners. When thinking about what device they would most likely buy in the near future, Functional Media Users are generally looking to get a new laptop.

## TV

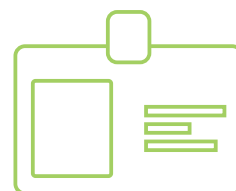
Functional Media Users are moderate TV viewers, and they consume TV mainly in the traditional way (live programming on a TV set). The most popular TV station is Eén, but Canvas is also most-viewed among Functional Media Users more than any other segment. Engaging in internet activities while watching TV is not that common, and is mainly done by browsing to the program website on their computers.

## COMPUTER AND INTERNET

Among the Functional Media Users, computers are mainly seen as functional instruments – with heavy usage on office and email applications and low usage for entertainment purposes (e.g. gaming and watching online videos). They rarely download films or series, but downloading music is slightly more common, and is mainly done on a legal basis.

## TABLET

Adoption of tablets is moderate in this segment, with 1 in 4 owning one in their households, which is most likely Android-based. They are not addicted to their tablets as Digital Explorers or Media Omnivores are, and state that their partners or their children are mainly the ones using these.



## TELEPHONY

Functional Media Users still have a high adoption of fixed telephone subscriptions and regular GSM's. As 4 in 10 own a smartphone (mainly an Android-based device), the intake of this device is moderate. Functional Media users tend to choose one of the classic mobile operators (Proximus, Mobistar or Base). WiFi is the main internet connection for their smartphone. Their frequency of mobile use is moderate to low and paying for apps remains a curiosity within this segment.

## SOCIAL MEDIA

Functional Media Users only subscribe to social media sites if they see an added value. They seldom use a social networks just to kill time. 1 in 4 doesn't have an account on any social network site. Facebook is by far the most popular social network site, but with only 4 in 10 visiting Facebook on a daily basis. As such, their frequency of use is rather moderate to low. Additionally, 4 in 10 agree that social media pose a threat to their privacy.

## GAMES

Gaming is not the reason Functional Media Users use their media devices for. Frequency of gaming on any kind of device is very low within this segment.

## TRADITIONAL MEDIA

Functional Media Users like listening to the radio, especially in their cars or homes via a traditional radio device. . Similar as with Digital Explorers, the favorite radio stations are Radio 2 and Radio 1, the difference being that Digital Explorers report higher scores on Q-Music, while Functional Media Users report higher scores on Klara. This segment rarely listens to internet radio and they are moderate users of online music channels, with YouTube being the only source they somewhat regularly use.

News is mainly consumed via traditional media such as radio and national/regional television. If they do use their computers to consume news, it's mainly to surf to news websites. As with the Digital Explorers, the most popular news websites for the Functional Media Users are HLN.be and Nieuwsblad.be. The difference between both segments is that Digital Explorers tend to report higher scores on HLN.be, whereas Functional Media Users score higher on Tijd.be.



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# ANALOGUE MEDIA FAN

(13,6%)

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ANALOGUE MEDIA FAN



Analogue media fans are very reluctant towards anything that has to do with digital media. Only 48% have an internet connection at home, and the adoption of internet-connected devices is extremely low. They do like watching live television, listening to the radio, and consuming news on traditional media.

## SOCIO-DEMOGRAPHIC

Analogue Media Fans are most likely women aged 65 years and older, and are generally lower educated. Remarkably, this segment is most reluctant in reporting their incomes, as almost 4 in 10 said they would rather not state their monthly net incomes. However, as they are retired, they tend to have lower incomes. They live in single households, being widowers or single without children.

## DEVICES

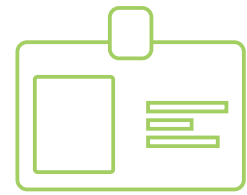
Analogue Media Fans are reluctant towards every type of new media, and therefore only own one screen in their households: a TV set (with 3 in 10 still exclusively owning a TV tube, by far the highest number amongst all profiles). Smart TV's and streaming devices are practically non-existent in the households of Analogue Media Fans. Over 50% do not possess any type of computer in their households. Moreover, only 48% have an internet connection at home – making this segment the least connected profile by far since the internet connection penetration within other profiles varies between 98% and 100%. These households are most likely to have fixed telephone subscriptions, and if they do possess mobile phones, these are most likely GSM phones (78%), and very rarely, smartphones (5%). They also clearly state that they are not interested in buying a new media device in the near future.

## TV

When Analogue Media Fans watch television, they consume live content, most likely on VTM or Eén. They still watch television in the traditional way, on classic TV sets (either a TV tube or a regular flat screen TV). They rarely use digital TV functionalities. Since internet connectivity remains low among this segment, the use of internet during a TV program remains a curiosity,

## COMPUTER AND INTERNET

Linked to the low adoption of desktops or laptops, over 50% of the Analogue Media Fans do not have an internet connection at home. The reason for not having computers or internet connections at home is mainly the lack of interest and skills. Privacy or financial cost is rarely an issue. As a result, Analogue Media Fans are not at all familiar with downloading media content like music or films/series.



## **TABLET**

As with other types of digital devices, adoption of tablets is extremely low. If they do report ownership of tablets in their households, their children are the ones mainly using these.

## **TELEPHONY**

Analogue Media Fans have the highest adoption of fixed telephone subscriptions and regular GSM's. They are unlikely to possess smartphones, and if they do own one, they use it just as a regular GSM (making no connection to the internet). The mobile phones of Analogue Media Fans are most likely over a year old, and the most popular provider is Proximus, the oldest mobile operator in Belgium. Analogue Media Fans rarely send text messages, and if they do, they send these almost exclusively via SMS. Additionally, they do not have apps on their phones, and as a result – do not pay for them. As they don't use apps on their phones, they also seldom pay for them.

## **SOCIAL MEDIA**

Only 1 in 5 Analogue Media Fans have a social media account. The ones who own a social media account are most likely on Facebook, and they certainly do not check their accounts on a daily basis. The main reason for not having an account is lack of interest and necessity.

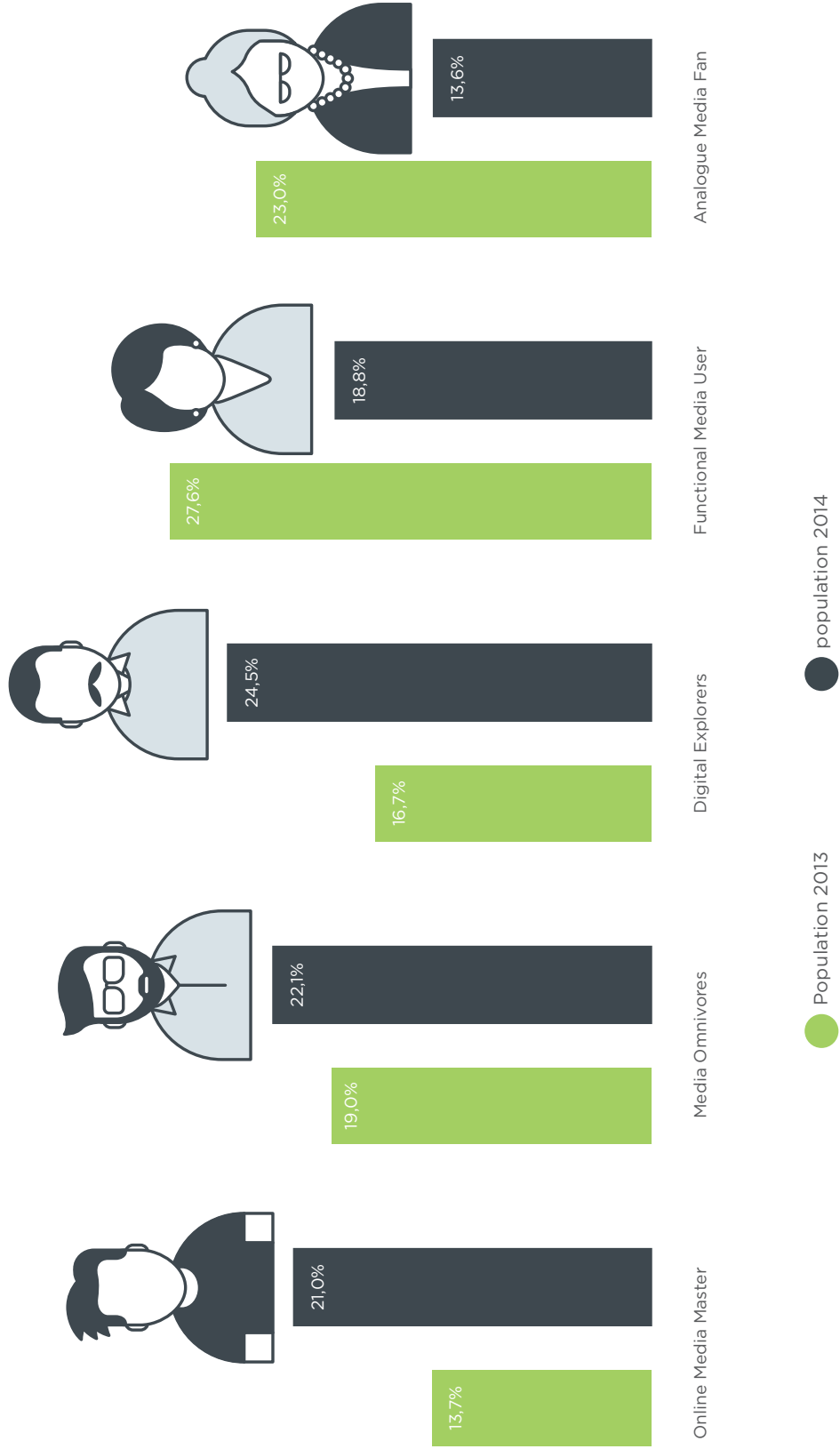
## **GAMES**

As the adoption of digital devices is extremely low, the frequency of playing digital games is also very low, if not non-existent.

## **TRADITIONAL MEDIA**

Analogue Media Fans enjoy listening to the radio, but only on a regular radio device at home (with a clear preference for Radio 2). As they rarely have internet-connected devices, they scarcely ever consult online music channels. Additionally, Analogue Media Fans rely on traditional media to be informed about the news (national or regional TV, newspapers and radio). Needless to say, they do not consult digital news sources.

## DIGIMETER PROFILES



## PROFILES

