MEASURING DIGITAL MEDIA TRENDS IN FLANDERS

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iMinds digiMeter

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PREFACE

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

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

The primary research goal of digiMeter is as follows:

With the digiMeter project, iMinds Living Labs intends to gather and share data and information regarding Flemish media and ICT users on a systematic and annual basis, adopting a representative methodology. This provides iMinds researchers with reliable data and information regarding the adoption and diffusion of (new) media and ICT, as well as the latest trends, habits and practices. This report serves as the public summary of this data[1]. Because of its annual frequency, digiMeter also serves as a monitor to detect and keep track of emerging trends and practices.

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

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

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

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

[1] For more information regarding the in-depth analysis of these data, please contact Prof. dr. Lieven De Marez (lieven.demarez@ugent.be) or Bart Vanhaelewyn (bart.vanhaelewyn@ugent.be).
[2] Panel management can be contacted through panel@iminds.be

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

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

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

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

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

DIGIMETER METHODOLOGY

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

- This is the eighth annual edition of the digiMeter report to monitor these evolutions.
- To allow for representative results for Flanders, a minimum quota sample of N=1500 is defined by province, gender, age (15+) and education level, based on the most recent federal statistics[1]. The total dataset is weighted based on the last three variables.
- In the period August to September 2015, 2.181 individuals have completed the survey. 1.532 respondents (or 70,2% of the total sample) were collected offline by means of (tablet) computer-assisted personal interviews (CAPI) or paper and pencil interviews (PAPI). 649 respondents (or 29,8%) filled out the survey online (computer-assisted web interview or CAWI).
- The survey consists of eight thematic chapters: TV, computer, tablet, telephony, social media, gaming, traditional media (radio, music and news) and general media use. Depending on their answers, respondents are directed to more questions on applications and other information regarding these technologies and media types. This way, digiMeter provides quantitative insights into the adoption and use diffusion of (new) media and ICT. The survey is concluded by a list of socio-demographic questions.
- Just like with the previous waves, this report concludes with a segmentation of the Flemish population. A K-means cluster analysis was used, based on 8 variables measuring the variety of use and 8 variables measuring the frequency of use (TV, computer, tablet, smartphone, social network, games, music and news) to construct 5 segments.
- digiMeter provides a snapshot view of the adoption and use of media and ICT. It is based on the self-reporting of media consumers. As such, the results should be interpreted as the perception respondents have of their own media consumption. The methodology does not allow for assumptions on the effective media reach.

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

- The survey investigates the adoption of devices within households: who has access to a device or service in their household? It does not measure personal ownership of a device (except for mobile phones), nor does it make assumptions on a household level (how many households own a device or subscription to a service). The latter would imply a completely different data gathering method and quota sampling.

- The evolution with regard to the previous wave is expressed by means of percentage points (the absolute difference between two percentages). For instance: when adoption increases from 20% to 30%, there is an increase of 10 percentage points. Expressed as a (relative) percentage, the same growth represents an increase of 50% (because to get from 20% to 30%, an increase of half the value of the starting point is needed).

- All respondents had an equal chance of winning a voucher, ranging from €10 to €500. The total amount of all vouchers combined was €2.000.

GENERAL ADOPTION

MEDIA & ICT ADOPTION IN FLANDERS – 2009 TO 2015

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

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

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

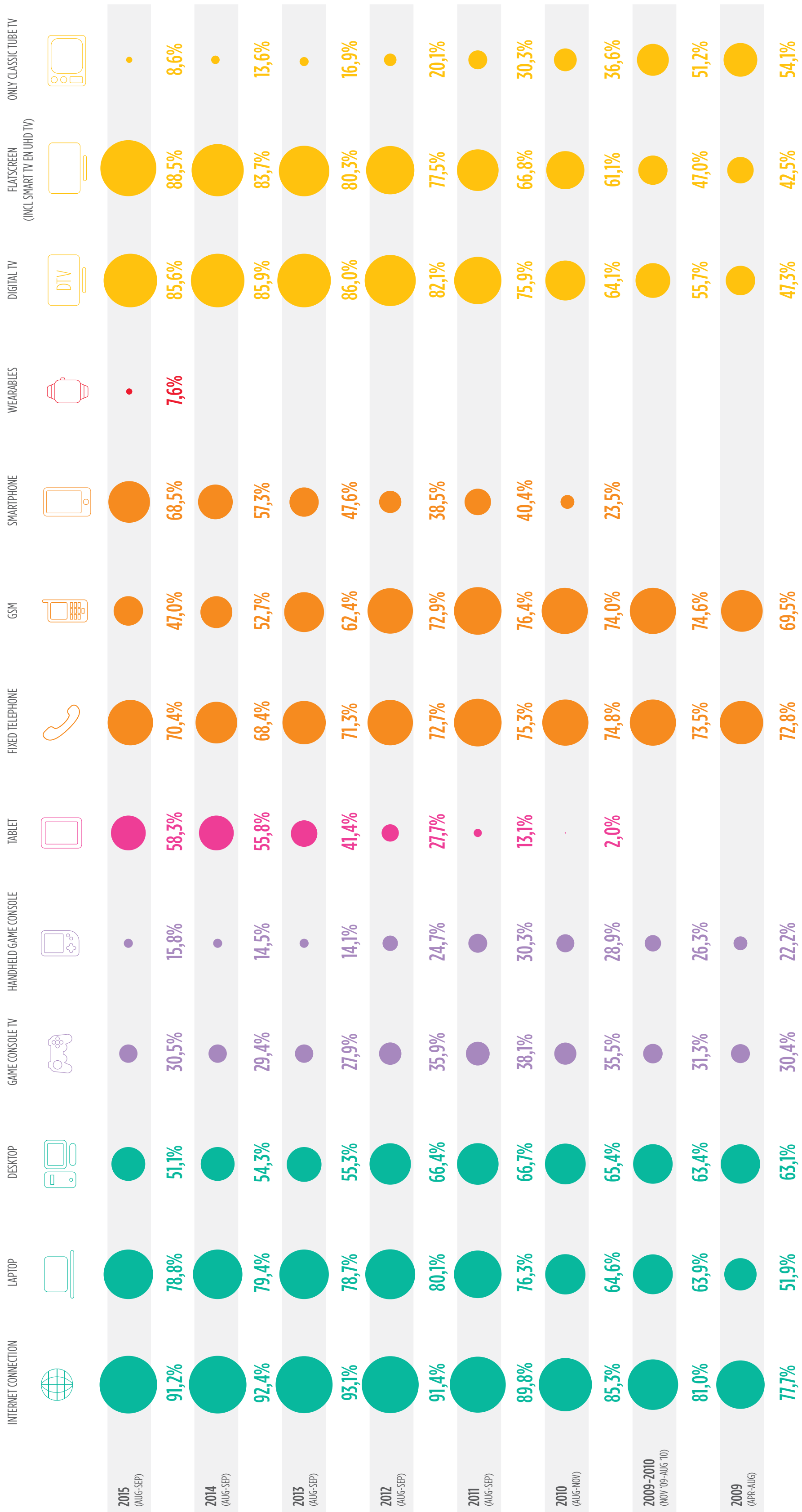
Telephones continue to be a widespread means of communication. Almost every Flemish person (99,2%) has a landline and/or a mobile phone at their disposal. In this mobile age, the use of landlines is stable at around 70%, whereas 97,1% of people have a mobile phone (GSM or smartphone) (+0,9). In 2014,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

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

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

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

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



Infographic 1: Media & ICT adoption in Flanders - 2009 to 2015 (%)

FACTS

MULTISCREEN

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

- 20,0% have a **triple-screen household** (-3,5): they have access to 3 different types of screens at home.

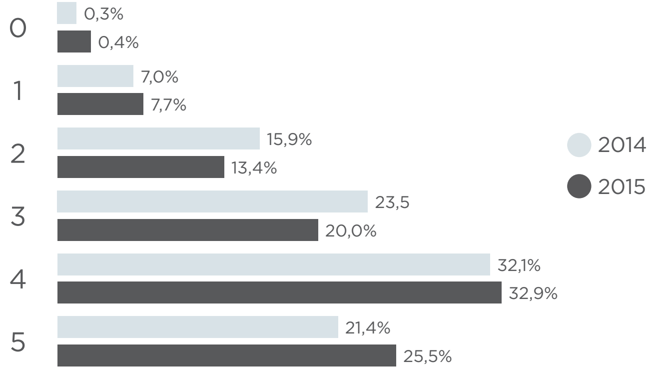
  - Most common triple-screen combination: TV, laptop and smartphone (8,4%)
  - Second most common triple-screen combination: TV, laptop and tablet (4,1%)
  - Third most common triple-screen combination: TV, desktop and laptop (3,3%)
  - Other triple-screen combinations: 4,2%

- 32,9% have a **quadruple-screen household** (+0,8): they have four screens at home.

  - Most common quadruple-screen combination TV, laptop, tablet and smartphone (18,9%)
  - Second most common quadruple-screen combination: TV, desktop, laptop en smartphone (7,3%)
  - Third most common quadruple-screen combination: TV, desktop, tablet and smartphone (3,3%)
  - Other quadruple-screen combinations: 3,4%

- 25,5% have a quintuple-screen household (+4,1): they have access to all five types of screens at home (TV, desktop, laptop, smartphone and tablet).

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



Graph 1: Multiscreen households: the number of screens
(TV, desktop, laptop, smartphone or tablet) to which the respondents have access in their household (N=2.181)

TELEVISION

DEVICES

- 97,1% own a TV set in their household.

- **The classic tube TV as an endangered screen type**. A classic tube TV is becoming increasingly rare in Flemish households. For 8,6% of the Flemish population, the classic tube TV is the only television screen in the house; last year this was 13,6%. Almost half of this group is at least 65 years old (47,3%).

- Just like last year, we can see that the decrease in the number of classic tube TV screens (-5,0 percentage points) was compensated for by an increase in the number of flat screen TVs (+4,8 percentage points). 88,5% now have a flat screen TV at home. In most cases, this is a normal flat screen TV (75,5%), whilst for almost 3 in 10 Flemish respondents this is a smart TV (29,2%).

- **Smart TV: in the first instance a flat screen and only in the second a connected (smart) device.** Ownership of a Smart TV in Flanders is increasing (+3,1 percentage points in comparison with last year). However, this does not automatically represent a drastic change in the way the TV screen is used. A quarter of those who have a smart TV at home, have never used an app on it and simply use it like an ordinary television screen. Smart TVs are certainly not always used ‘smartly’. If they are, the YouTube (18,7%) and Netflix (17,5%) video apps are far and away the most popular apps based on weekly use. In particular the younger segments (15-29 year olds) who own a Smart TV appear to make regular use of apps on the Smart TV.

- **Rise of streaming devices.** Apart from using a Smart TV, there are other ways to connect a television screen to the internet, or to wirelessly stream files from another device (computer, smartphone or tablet) to the television screen. Around 7,0% of Flemish people own a Google Chromecast and 5,7% have an Apple TV box at home.

DIGITAL TELEVISION AND OTHER SUBSCRIPTIONS

- The adoption of digital TV subscriptions remains stable at 85,6%.

- Electronic Program Guide (EPG) (57,2%), Ad skipping (48,7%) and Recording a program or movie (37,9%) remain the most popular digital TV functionalities on a daily basis.

- **Modus vivendi with adverts on TV?** The possibility to fast forward through ads remains a popular feature of digital television. However, for the second year in a row, willingness to pay for this function has dropped significantly. Almost six out of ten respondents would prefer to lose the ability to fast forward through adverts than to pay extra for it (58,1%). That's 7,6 percentage points higher than last year. With only 1 in 5 Flemish people (22%) willing to pay for ad skipping (in 2014 this was 28% and in 2013 even 33%), the Flemish seem increasingly to be reaching a modus vivendi in the variety of 'viewing' alternatives. Ads on television are a necessary evil; when people want to enjoy a film or series without ad breaks, they will choose other (on-demand) platforms.

- **Netflix gains streaming customers.** A year after the launch, 11,5% of the Flemish population report that they have access to a Netflix account. N.B.: access is not equal to unique subscriptions here. Our previous Netflix report[1], among others, revealed that one account can quickly be shared between 4 to 5 people. Not only within a family but often also outside the family. If we take this into account, we estimate that the number of unique subscriptions to Netflix in Flanders is somewhere between 120.000 and 155.000.

WATCHING TV CONTENT

- 3,1% of the Flemish population never watches TV content on any device.

- 44,5% of the Flemish population reports to watch 1 to 3 hours a day of TV on a television set; one in five (20,1%) claims to watch at least 3 hours a day. 27,8% watch TV content at least once a week on a laptop, 14,3% on a tablet, and 15,8% on a smartphone.

- **Mobile screens are increasingly used to view TV content and the smartphone has become more important than the tablet for this.** This is true particularly among young people. There is a clear link between age and watching TV content on other screens. Almost 70% of people under 30 watch TV content on a laptop every week. This is much higher than the 27,8% for the total population. Therefore, the profile of people who watch TV content on a laptop is relatively young, with 52,1% younger than 30. We also note that there is a young profile (51,8% younger than 30) for the weekly use of a smartphone for watching TV. With regard to 15 to 19 year olds, almost half (49,1%) say that they watch TV content via their smartphone every week, whilst for the category aged 20-29 this is 35,0%. This is again significantly higher than the 15,8% for the total population. For tablets, we can see that this is a slightly older profile. Two in three (66,8%) of those who watch TV content via a tablet every week are between 20 and 49 years old.

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

- **Live (linear) programming upholds its importance, while mobile screens seem to serve as a supplementary alternative rather than a substitute.** Watching television is becoming more and more of a multiscreen activity, while 'the large television screen in the living room' remains a standard for the average person in Flanders. Due to the application of a self-administered questionnaire, digiMeter does not allow conclusions to be drawn regarding the portion of time spent on each of these devices, nor the time spent watching live/linear programming versus timeshifted viewing. However, when we asked our respondents to what extent live/linear programming and timeshifted viewing are represented in their viewing behaviour (regardless of the actual time spent and the device used), we can conclude that live television upholds its importance in the viewing habits of the Flemish population, with 60% claiming to watch live content every day. Timeshifted viewing remains stable at about 30%. Alternative forms of watching TV content are still less common on a daily basis.

- The way TV content is consumed is highly dependent on the age of the viewer. Watching live/linear TV remains popular within all age groups. Overall, 74,7% indicated that they watch (at least once) live/linear TV on a weekly basis. However, it is striking to see that timeshifting equals or even tops live viewing among the two youngest age groups. Among the 15-19 year olds 65,5% and 64,9% respectively indicated that they watch live and timeshifted at least once per week. Among the 20-29 year olds, this makes up for 58,8% for live viewing and 61,0% for timeshifted viewing. Among the 65+ segment, linear television is by far the most common way to watch TV on a weekly basis (87,9%). Less than half of those aged 65 or older report watching in time shifted mode (43,3%), and other types of viewing are rarely reported on a weekly basis by the oldest age group (< 7%). Not surprisingly, the youngest profiles (15-19 and 20-29 year olds) are the most familiar with watching TV content via downloads (40,9% and 51,6%, respectively) and via streaming websites (50,2% and 58,6%).

USING THE INTERNET WHILE WATCHING TV CONTENT

- **Multiscreen = multitasking in front the main screen.** The usage of the internet while watching TV ('media multitasking') has become a common practice. 69,9% (+0,1) say that they have engaged in an online activity on another screen while watching TV at least once last month.

- Last year we saw a shift towards more program-related activities. This year, we have seen a stabilisation, with 64,4% (+3,4) performing an activity that is separate from the TV program and 56,4% (-0,7) who had performed an online activity that was linked to the TV program they were watching at the time last month. So in many cases, multi-device use remains a 'distraction' but more than half the Flemish population also engages in 'interaction' with TV content. Within these 'interaction' activities, we see little change in comparison with last year (see further on).

- This year we have not noticed any major changes in the activities the Flemish perform online whilst watching TV. Last year we saw that visiting the program's website had risen by 23,3 percentage points, whilst this now seems to have stabilised at 41,5% (+1,5) of Flemish inhabitants regularly visiting the website of a program they are watching on the large TV screen using a mobile device. Searching for additional image material also rose significantly by 20,4 percentage points last year, whilst the increase this year was “only” 2,6 percentage points. Like last year, voting/playing along in a TV program (e.g. via a second screen app) is a less common activity with 1 in 8 Flemish inhabitants having done this last month. Almost 3 in 10 members of the Flemish population say that they have shared an opinion about a program online last month (27,8%). It is noteworthy that looking up information about a TV ad has remained stable at almost 30% (27,2%).

- **Smartphones in particular are becoming more important in a multiscreen TV context.** In general, we can see that the computer (laptop or desktop) is still the most commonly used device to engage in an online activity whilst watching a TV program, although this year we have noticed that the smartphone is gradually reaching the same level (which is of course closely linked to the increasing adoption level for smartphones, whilst ownership of computers is stabilising). With regard to sharing your opinion about a program, the difference has already almost disappeared, whilst with regard to voting/playing along with a program we can see that a few more Flemish people now use their smartphone for this rather than their computer. In line with the generally falling use of the tablet (see chapter Tablet), we also notice for media multitasking that the tablet is becoming less important and the smartphone is increasingly taking over this role. Within the segment of smart TV adopters, it is also worth noting that 1 in 5 people also use their smartphone as a remote control for this smart TV.

- Although we can still see a correlation between age and media multitasking (the younger the profile, the greater the proportion that was engaged in media multitasking last month), this is no longer unknown territory even for the older profiles. More than 4 in 10 (42,6%) of those aged 65+ said that they performed an online activity whilst watching TV last month. Last year this was 36,5%.

- Almost three in ten Flemish people shared their opinion on the TV program they were watching at the time last month (+2,9). Facebook remains by far the most commonly used channel here (69,6%), whilst use of a second screen app specifically for the program remains fairly limited (5,0%).

COMPUTER

- **Computer and internet ownership are saturating.** Having access to a computer (90,1%) and the internet (91,2%) within the family have reached a point of saturation and stabilisation over recent years. The laptop remains the most common type of computer (78,1%). A little over half of Flemish inhabitants have a desktop computer at home (51,1%) whilst 6,3% say they own a hybrid device (a laptop with a touch screen, where the screen can be detached to be used as a tablet).

- **The lack of a computer or an internet connection is still mainly a matter of 'skills', with 'cost' gaining importance as a factor.** Most people who currently do not have a computer (mostly aged 65 years and older) never had one in their household. The main reasons for not having a computer are lack of computer-related skills (45,8%) and lack of interest in computers (24,0%). However, lack of interest has declined as a barrier for computer adoption, as last year 32,7% indicated this to be a major reason for not having a computer at home. The expense of a computer has gained importance as a reason for not having one at home: 11,8% (a growth of 5 percentage points compared to last year) indicate the high cost to be a threshold to buy a computer. Although this is a remarkable increase, it is still a far less frequently selected reason for not having a computer than a perceived lack of skills. This indicates that the digital (or computer) divide is still rather an issue of skills than of financial means.

- Fewer than 1 in 10 (7,5%) have neither a computer nor a tablet nor a smartphone. Almost three quarters of people who do not have access to one of these devices are 65 or older (72,3%). It is notable that half of the Flemish population have access to a computer and a tablet and a smartphone (48,3%). We can also see that where a computer is still the only internet device at home for 15,1% of the Flemish (mainly among those older than 60), only a very small fraction have just a tablet (0,6%) or just a smartphone (0,7%). So a smartphone or tablet is rarely the only gateway to the internet.

- Most people who currently don't have an internet-connection at home never had a connection in the past. Reasons for not having an internet connection at home show a pattern similar to the reasons for not having a computer. It's more a question of lacking skills and interest in the internet, and less of a cost-related issue. Moreover, privacy-issues are rarely reported as a reason for not having an internet connection (1,0%).

- Most people spend an average of 1-5 hours per day (40,1%) at the computer. Almost three in ten of the population (28,3%) use a computer more than 5 hours a day, and 14,9% report using a computer more than 8 hours a day.

- Eight in ten use the computer on a daily basis. The most common daily internet activities on a computer remain reading (77,1%) and sending e-mail (65,8%), browsing information (68,0%), social networking (55,0%) and news consumption (50,2%).

- **Rise of streaming on the computer. Both video and music.** Apart from the daily computer habits, one of the most striking developments is the rise of streaming. When it comes to music, half of Flemish computer users (51,0%) have experience with streaming music and a third of these (33,5%) say that they do this on at least a monthly basis. These are increases of 5,0 and 5,5 percentage points respectively in comparison with last year. When it comes to streaming of films and series, we can see an increase of 4,4 percentage points to a quarter of the Flemish population (25,9%) who do this regularly (at least monthly). An increase that we can attribute for a large part to Netflix.

- **More illegal downloads. Compensation for streaming?** Just like last year, we see that music is being downloaded legally more often than films or series. 48,4% of those who have ever downloaded music say that they do this mainly or entirely legally (a reduction of 1,9 percentage points in comparison with last year), while for films and series this is just 31,3% (-5,3). It is noteworthy that the proportion who state that they mainly or only download legally is falling in comparison with last year, both for music and for films and series. It is important to note that we are not making any claims about the number of downloads. A possible explanation could be that fewer films/series and less music are being downloaded because people are streaming more audiovisual content (e.g. through Netflix). And what is downloaded on top of this streaming, is more often illegal. This hypothesis is fuelled by the fact that there is a significant relationship between streaming and downloading of content: the weekly downloading of content is more often seen among those who stream content weekly. digiMeter cannot make any claims on the reasons behind this. Although the following two motivations do seem the most obvious: firstly because the content is not (easy) to find legally and secondly because it feels 'justified' as people have already paid for digital streaming (e.g. by paying for Netflix) and that compensates for these 'few' illegal downloads.

- In streaming, we can also see that music is streamed legally (75,7%) more often than films or series (51,9%). It is noteworthy that both for music and for audiovisual material, the proportion that mainly or only stream legally is higher than the proportion that mainly or only download legally.

- **Streaming mainly takes place legally, downloads mainly illegally.** This appears to be the trend. The rise of paid services like Netflix and Spotify means that people are streaming more. On the other hand, this does seem to cause people to find a 'justification' for downloading more illegally for the rest of their music and video consumption.

TABLET

- **Tablet growth falters.** The adoption of tablets seems to have reached a stagnation point. Almost six in ten Flemish people (58,3%) say they now have access to a tablet in the household. This is an increase of 2,5 percentage points in comparison with 2014. Last year, the increase was as much as 14,4 percentage points.

- **Ownership is not the same as use.** 58,3% have access to a table in the household, but only 48,5% of Flemish inhabitants actively use this themselves.

- Half of the most frequently used tablets are iPads (Apple iOS) and 38,4% of all tablets run on Android.

- Tablet adoption is the highest among people under 50, peaking at 15-19 year olds (75,8%) and 40-49 year olds (74,3%). The fact that both age groups are very similar is no surprise. The 15-19 category often still live with their parents, and these parents are often 40-49 years old. Since we are asking about the ownership of tablets within the family, it is not illogical that the two age groups show a similar adoption rate. There is a difference in use between the two groups, however. Of those aged 40-49 who have access to a tablet within the family, 58,3% say they use this daily themselves. Among 15-19 year olds this is only 36,5%.

- **Two groups of tablet users. The tablet seems, on the one hand, to be mainly something for households with (young) children, in which the tablet is often shared among different members of a family, and on the other hand for slightly older, higher educated people who consider it primarily a personal device.** We can also see notable differences in use between the two groups. In those younger than 50, we see higher use of entertainment applications (chatting, taking and sharing photos, consumption of music and audiovisual content). In those older than 50, we see higher use figures for more functional applications (emailing, searching for information, visiting news websites, online banking). We can also identify a clear age difference in the area of connectivity. For those younger than 50, the tablet is used quite sporadically at home on the sofa or in the bedroom. So the Wi-Fi connection at home is sufficient for connection to the internet. For those older than 50, the tablet takes a more central position and the device is also used outside the home. This translates to higher use of Wi-Fi networks at other people's homes, public hotspots and mobile internet.

- **Adoption intention for tablet falls.** The intention to buy a tablet in the coming 12 months fell significantly over the past year. Last year, 29,0% indicated that they were considering buying a tablet within the year, this year it is only 20,6%. The largest decrease is among those who do not yet own a tablet. Within this group, we can see that last year, 32,4% were still considering buying a tablet, while this year it is only 21,2% (a decrease of 11,2 percentage points). Those who have access to a tablet are also less inclined to buy a new tablet in the coming 12 months (a decrease of 6,0 percentage points). This significantly reduced intention to purchase supports the hypothesis that the adoption level for tablets in Flanders is gradually reaching saturation point.

- The frequency with which a tablet is used, appears to be falling. Last year, 69,4% of people with access to a tablet, stated that they used this daily themselves. This year it is only 53,0%. The proportion of ‘heavy users’ (more than 3 hours on the tablet per day) has also fallen slightly by 1,9 percentage points (from 8,7% in 2014 to 6,8% in 2015).

- Although tablets can be connected to the internet in various ways, the most common type of internet connection for tablets is the Wi-Fi network at home (88,3%). 9,6% have a mobile internet connection for their tablet using a sim card (via a subscription or a prepaid card).

- E-mail (reading 41,9% and sending 34,1%), searching for information (39,8%), social media (37,4%) and visiting news sites (29,14%) are the most popular daily activities on a tablet.

- **Overall, we can say that the tablet is stagnating, both in terms of adoption and in the area of (frequent) use of the tablet.** Adoption is still growing, but the growth has decelerated significantly in comparison with previous years. Daily use of the tablet is falling sharply and this is also apparent in the activities carried out daily. For many people, the tablet no longer seems to be the first device they reach for to consume digital content or perform an online activity. An exception to this rule are the older segments, for whom the tablet is more often used as a personal device (that is not shared with other people within the family) and is more central in their media consumption pattern. Where the tablet is losing ground, this is mainly picked up by smartphones (with larger and larger screens).

TELEPHONY

- Amid the ‘mobile force’, landline telephony is holding its ground at around 70%, whilst 97,1% have a mobile phone (whether or not a smartphone).

- **Smartphone on top. Almost 7 in 10 have a smartphone and also use this ‘smartly’.** Last year, we saw that the adoption of smartphones (57,3%) was higher than the adoption of GSM (52,7%) for the first time. In 2015, this difference increased rapidly: it is now at 21,6 percentage points. The adoption of smartphones rose by 11,2 percentage points to 68,5%, whilst the adoption of GSM fell by 5,7 percentage points to 47,0%. In 2015, the smartphone was the only device that showed growth in comparison with last year.

- **1 in 3 senior citizens also has a smartphone today.** Ownership of a GSM is highest among the oldest age groups (50+), lower educated people, smaller households (maximum of 2 family members) and those with a lower family income. With almost 7 in 10 members of the Flemish population owning a smartphone, the smartphone has become a device for all sections of society. Even among those aged 65+, we can see that 1 in 3 now own a smartphone. This does not mean that there is not still a clear difference between adopters of smartphones and adopters of GSM. We can see that smartphones have the highest adoption rate among those younger than 50, with a higher education level, living in a medium to large family and with a medium to high family income.

- **In the margin, we can also identify a (temporary?) small but growing group of people who are consciously moving away from the smartphone.** The main reason for not (or no longer) having a smartphone is the lack of added value in comparison with a GSM. Among those who previously did own a smartphone, but have now stepped back from this (around 4,5% of those who do not currently own a smartphone, which represents 1,5% of the population of Flanders), the experience with a smartphone has led to them deciding that it does not work for them, to developing a dislike for it (for privacy reasons or because of dependency/health reasons) or to finding they use it too little.

- Android remains the most popular smartphone operating system at 52,8%, with iOS in second place at 31,9%.

- **Smartphone use: ‘smart’, but most importantly ‘often’.** Almost everyone who owns a smartphone also uses this daily (92,5%). Around one in three (34,0%) say that they spend more than three hours on their smartphone daily.

- Over half of all smartphone owners use their smartphone for reading e-mail (63,0%) and checking social media (60,4%) on a daily basis.

- We previously saw that one in three people aged 65+ now have a smartphone. However, daily use of their smartphone is significantly lower than in other age groups. Only the daily use of online banking on the smartphone is higher among those aged 65+ (12,5%) than in the total population (7,0%).

- **OTT communication is booming. SMS vs. OTT: accumulation rather than cannibalisation.** On smartphones, people still most often make calls via the traditional mobile network (42,6% daily). However we do see that almost 3 in 10 smartphone users (29,4%) say they use a web application such as Skype or Facetime on the smartphone for a telephone conversation. When it comes to sending messages, we have found that classic text messages are comfortably holding their position in Flanders, with 70% of smartphone users sending a text message daily. Use of so-called 'over the top' services[2] is increasing, with 51,8% making daily use of one of the listed OTT services. This is an increase of 5,2 percentage points in comparison with last year. The most popular messaging apps are Facebook Messenger (39,3%) and WhatsApp (25,7%). Both have also seen the biggest increase in comparison with last year (+9,6 and +10,7 percentage points, respectively).

- If we split the figures for daily use of messaging services by age group, we can see that both daily sending of text messages and sending messages via web application is very popular among young smartphone owners (aged 15-29). So (in the short term), the increasing popularity of OTT messaging services has not had a cannibalising effect on text messages via the classic mobile network; both seem to be used alongside each other. Among the applications we can see a number of notable age differences. Snapchat, for example, remains a very popular medium among young people: 66,5% of smartphone owners between 15 and 19 say that they use Snapchat every day, among 20-29 year olds this drops to 32,1%, and in the older segments it is below 8%. WhatsApp on the other hand, has a slightly more level profile (37,0% in the youngest segment compared with 11,3% in the oldest segments). Facebook Messenger remains the most popular online messaging service within every age group, however, with the exception of those aged 65+, where WhatsApp has a higher daily adoption.

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

SOCIAL MEDIA

- The number of Flemish residents with a social media account is stagnating. In 2015, 77,0% of the Flemish population has an account on at least one social media site.

- Having an account doesn't necessarily mean using it often. While 77,0% of the respondents have an account on at least one social media site, only 72,4% of the population has logged in on a social network site in the last month.

- **7 in 10 are active social media users in Flanders. Facebook rules.** When asked about the social networks on which the Flemish have an account, Facebook (70,4%), Google+ (45,0%) and YouTube (41,7%) are the most cited names. If we look at which social network sites respondents logged into last month, we also see the same three but in a different order. Facebook remains authoritative in first place (66,9%), but YouTube (29,9%) now beats Google+ (23,4%) to second place.

- **Facebook: stagnation in active users?** Facebook is still on top in social media land, but there no longer seems to be much margin in the 'net growth'. This doesn't mean that we are looking at a real standstill. New Facebook users are still being added, but this growth is being largely offset by people who are consciously taking a step back (as much as around 2,5% of the Flemish population). After the small group of Flemish people who seem to be consciously stepping back from the smartphone (1,5%) we can also see a small group who are turning their backs on Facebook (for privacy reasons or because of lack of time and 'relaxation'). It is still too soon to make far-reaching conclusions, but we will definitely be watching to see whether this trend continues over the coming years.

- Those with a Facebook account seem to be the most active users: 95,0% of the Flemish population who have a Facebook account, have logged in to their account in the last month. With seven in ten account owners having logged in during the last month, Instagram and YouTube (both 71,7%) share a second place when it comes to 'active use'. Google+ has largest number of 'sleeping accounts'. Pinterest and Instagram are gaining most in active users.

- Facebook has the highest usage frequency: 43,8% of the Facebook account owners use it at least one hour a day (+3,9). Instagram also has a loyal and active fanbase, with one in five (20,6%) using it at least one hour a day. For Twitter (12,1%), LinkedIn (2,6%) and Google+ (7,4%) this is far less.

- **Privacy paradox.** Amidst all this, we can see that the Flemish are increasingly struggling with the privacy paradox. In stark contrast to the minority of people who are distancing themselves from devices like laptops, smartphones or tablets for privacy reasons (see chapters Computer, Telephony and Tablet, respectively), a growing number of Flemish people are worried about their privacy on social media (41,2%; +5,5 percentage points), but at the same time admit that they are disclosing more and more on social media (28,4%; +3,0 percentage points).

GAMES

- 55,1% of the Flemish population played a digital game in the past month. The most common devices to play games on are the computer (31,2%), the mobile phone (30,4%) and the tablet (22,3%). The significant drop for tablets (-9,0 percentage points in comparison with last year) is noteworthy. This change fits with the overall decreasing popularity of the tablet. Not only is growth in adoption falling sharply, the daily use has also fallen significantly (see chapter Tablet).

- A third of the Flemish population (33,5%) say that they have a games console at home. The most popular remains the fixed games console, which is connected to a television set (30,5%). Portable consoles stand at around half of that figure, with 15,8% of the Flemish now having a handheld console at home. These adoption figures have remained fairly stable over recent years and have even risen slightly. Despite the growing number of other devices on which digital games can be played (think of the tablet and smartphone), games consoles do not seem to be suffering in the short term.

- Where the gender difference between gamers and non-gamers has gradually disappeared, we do still see that age has a major impact. Among 15-29 year olds, over 8 in 10 have played a game last month, whilst among those in the 30-49 age category this figure is more than 6 in 10 and among those aged 65+ it is 3 in 10.

- There is a clear difference in profile if we look for each type of device at who has played games on that device in the past month. The fixed games console still sees the most stereotypical image of the typical gamer: mainly men and mainly younger than 30 (with a peak between 15 and 19 years old). With regard to gaming on the computer, the profile is more level, with an almost equal proportion of men and women who have played a game on the computer last month. The age difference is also less pronounced than for the fixed games console, but we do still see that gaming on the computer is more common among 15-19 year olds (50,8%) than those aged 65+ (23,6%). With regard to gaming on a mobile phone, we can see a strong age difference, but an even distribution in terms of gender. Gaming on the tablet bucks the trend. Not only are women represented slightly more than men, we can also see that a quarter of those who play a game on the tablet monthly are between 40 to 49 years old (so there is a slightly older profile than for gaming on other devices).

- Almost half of those who played a game last month, say that they play less than daily (48,5%). It is interesting that the group of heavy gamers who play for at least one hour per day is growing. Last year, 21,9% played for at least one hour a day, this year it was 24,0% (+2,1 percentage points).

- Heavy gamers not only spend more time gaming (at least 1 hour a day) but also demonstrate greater diversity in the devices used. More than 7 in 10 heavy gamers have played on at least two different devices last month (most often computer and smartphone). Among those who play for less than 1 hour per day, this is only 47,7%. If we look at each separate device, use is always higher among the heavy gamers. An exception to this is the tablet. Use of the tablet as a gaming platform is as high for light gamers as for heavy gamers (both 40,5%).

TRADITIONAL MEDIA

RADIO

- Half the Flemish population listen to the radio in the car or at home via a radio set.

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

MUSIC

- 59,5% (+3,2%) of the Flemish population reports to have consumed online music in the last month. Men and people in younger age categories are more likely to use online music channels.

- YouTube remains by far the most popular online source for music (45,3%).

- Less than one in four (22,1%) reports that they also pay for online music via the suggested music channels (either buying music or having a paid subscription). When people pay for online music. it is most likely via iTunes (15,9% of the population).

NEWS

- Radio (58,9%), national television (56,8%) and the computer (35,2%) are the sources most commonly used to consume news on an everyday basis.

- Following news through more traditional channels such as radio, national television, computer and the printed newspaper is a daily routine for an increasingly small number of respondents. The majority of Flemish inhabitants say that they still use these channels on a monthly basis to consult the news.

- **The smartphone is the only climber when it comes to news consumption.** The classic radio and television channels continue to dominate, although they are losing some ground, just like the tablet. The smartphone, on the other hand, has increased by 5,0 percentage points as a daily news source. This has become a daily news source for three in ten members of the Flemish population making it as important as the printed paper on a daily basis. In contrast to many other emerging mobile habits, it seems that news consumption is not limited to young people. The rise of mobile news consumption on smartphones manifests itself in all age groups under 50. People seem to read news mainly on a personal device and less on a shared device. The use of a shared printed newspaper is falling, but shared digital media such as tablets are also starting to be used less. Only the group for whom the tablet is a personal device (the 40-65 year olds, see chapter Tablet) have developed a very clear habit of following the news daily on a tablet. In families with children, this happens much less frequently.

- If we look into detail at the digital news sources, visiting news sites is most popular (68,9% have visited a news website last month), mainly by means of a computer. With the exception of reading a digital newspaper, the smartphone has a higher user base than the tablet. Personalized news apps (such as Flipboard, Feedly, Zite) are not that common yet, as only 8,8% have used one during the last month.

- If we ask about the preferred medium for following the news, it is primarily the more traditional channels, such as television (25,2%) and printed paper (22,2%) that come out on top. We do see clear differences between the age groups, however. With regard to the 15 to 19 year olds, the smartphone is by far the preferred device (31,1%). Among those aged 20-29, the computer (19,8%) and the printed newspaper (18,9%) receive the highest scores. From the age of 40, the television screen and printed newspaper represent the media chosen most often to follow the news.

GENERAL MEDIA USE

- **Churn for mobile, upgrade for internet.** Almost 8 in 10 people said they did not make any changes to any of the listed subscriptions last year (79,4%). The most common change was switching network provider (10,2%). 8,0% of the Flemish population say they took out a larger internet subscription in the past year. This is connected to the higher level of video consumption via the internet. Within this group, a quarter say they have a subscription to Netflix (25,4%). This is much higher than the total population (11,5%, see chapter TV). This finding seems to confirm a proposition from the digiMeter Netflix study[3]: the arrival of Netflix is causing a lot of people in Flanders to exceed the data limits within their internet subscriptions for the first time, meaning that an upgrade to a larger subscription is desirable or even unavoidable.

- With 7,6% owning wearable tech, we can't yet talk about a wide-spread adoption of these devices. At present, those who own wearable tech are mainly men (68,9%) between the ages of 30 and 49 (49,9%) and almost all people adopting wearable tech are almost entirely (92%) also to be found in the segment of smartphone owners (the device for/to which the wearable tech is often an extension). The most popular wearable tech items are smart sports watches (3,5%), smart wristbands (2,4%) and smart watches (2,2%).

- When asked about the intention to buy a device in the near future, 21,0% say they would choose a laptop and 19,9% say they would choose a tablet. We can see some notable differences between age groups, however. Those younger than 30 would mainly prefer to purchase a smartphone or laptop. For those aged between 30 and 59 we notice an increased preference for purchasing a tablet. The option 'no preference' received the highest score among those older than 60.

- The television set (28,7%) and smartphone (25,5%) are now an intrinsic part of life for most Flemish people. At least, that's what we find when we ask which technology they would least be able to do without. There are in fact large differences within age groups here too. Those aged between 15 and 19, mainly couldn't be without their smartphone (54,0%). Those between 20-39 would also find it difficult to be without their smartphone, but here we see a higher score for the laptop. The highest score for the tablet as an indispensable device is among those aged 40-49 (11,7%), although the scores for the smartphone (35,0%) and television set (21,6%), for example, are higher again. From age 50 onwards, the television set is by far the most indispensible media device.

- Use of cloud services to store date is certainly no longer a niche product, with 49,1% having used at least one of the listed storage locations (Dropbox, Google Drive/Google Docs, iCloud, One Drive, Amazon Cloud Drive or as an attachment in an email you send yourself) in the past month. Physical storage locations are still more widely used, however, with the device's internal memory (e.g. the internal hard disk of a computer) in particular as a popular storage location (67,1%). With 25,1% of the Flemish population having used it last month, Dropbox is the most popular online storage service. It is interesting that more than 1 in 5 people emailed a file to themselves in order to make it available online last month (21,6%). Despite the increasing number of (free) online storage services, emailing files to yourself is still a very popular way to store data online. The storage service from Google, such as Google Drive and Google Docs were used by 17,0% of the Flemish population last month.

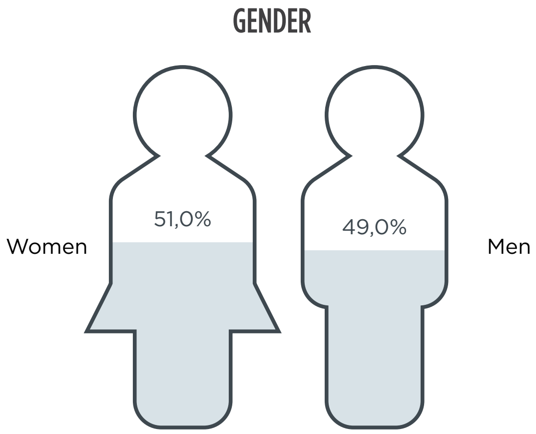
[3] You can find more information on the digiMeter Netflix study at http://bit.ly/dM_Netflix

SOCIO-DEMOGRAPHIC

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

GENDER

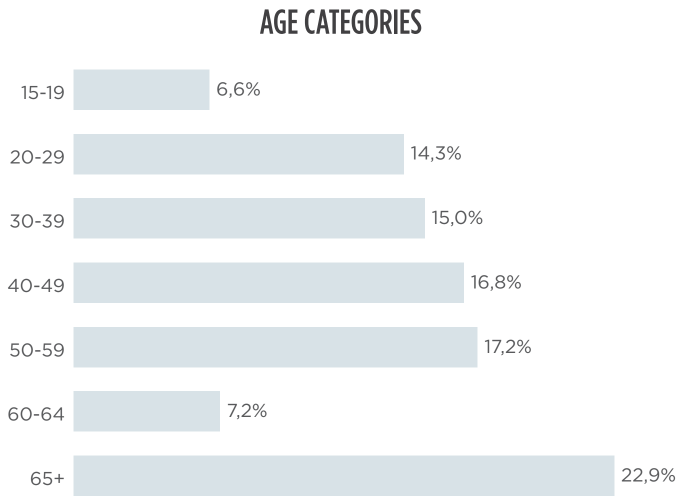
Our sample consists of slightly more women (51,0%) than men (49,0%).



Graph 2: Population plotted by gender (N=2.181)

AGE CATEGORIES

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

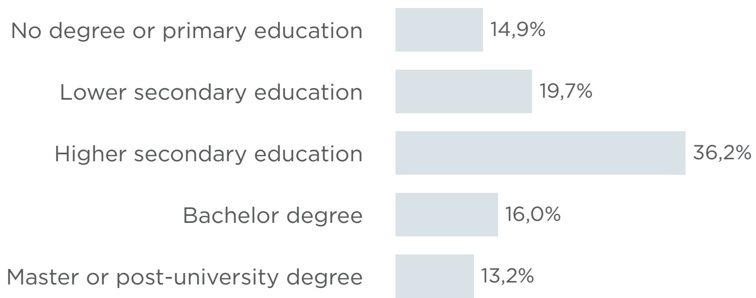


Graph 3: Population plotted by age categories (N=2.181)

EDUCATION LEVEL

29,2% has a higher degree (16,0% Bachelor, 13,2% Master or Postgraduate degree); 14,9% completed only primary education or hold no degree at all.

EDUCATION LEVEL

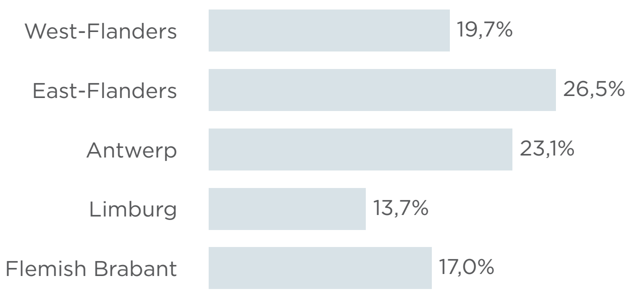


Graph 4: Population plotted by education level (N=2.181)

PROVINCE

During the data collection, quotas were set on region to guarantee a sample representative for the whole of Flanders. However, as we do not hold any hypotheses on the effect of region on the adoption of media and ICT, region was not taken into account when weighing the final dataset.

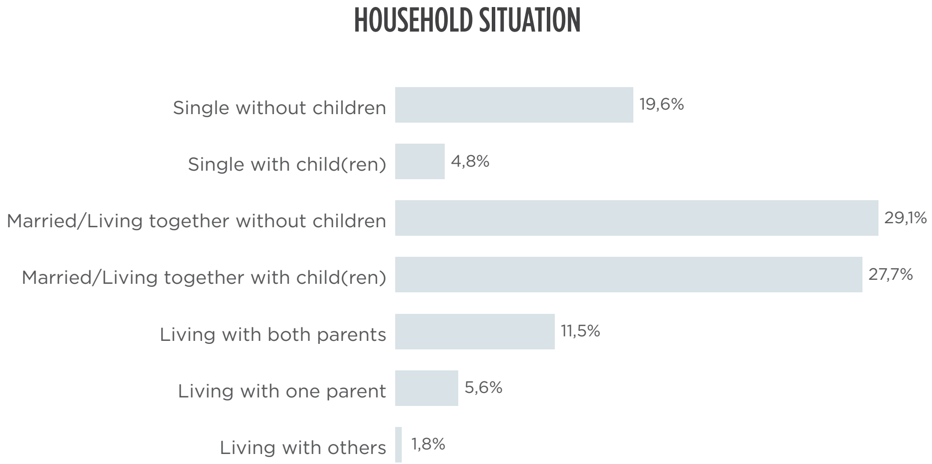
PROVINCE



Graph 5: Population plotted by region (N=2.181)

HOUSEHOLD SITUATION

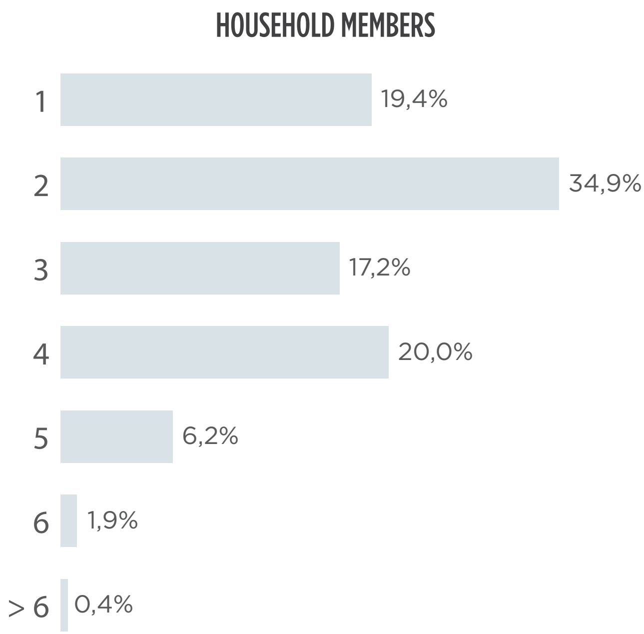
Over half our sample is married or living together with their partner (29,1% without children, 27,7% with children). The third-largest group in the sample is single individuals without children (19,6%).



Graph 6: Population plotted by household situation (N=2.181)

HOUSEHOLD MEMBERS

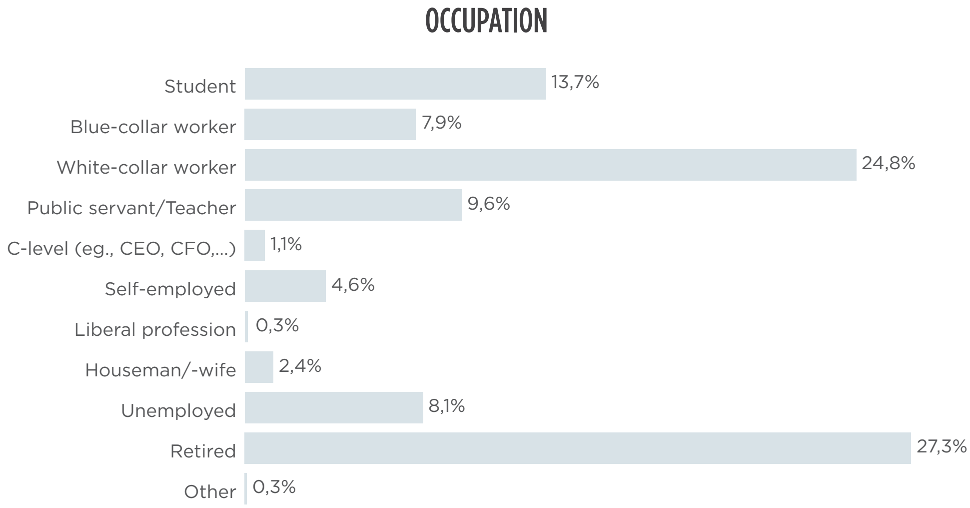
Most households in our sample consist of 2 people (34,9%). 19,4% lives on their own, 28,5% lives in households of at least 4 people.



Graph 7: Population plotted by number of household members (N=2.181)

OCCUPATION

The majority of the sample is either retired (27,3%) or white-collar worker (24,8%). 13,7% is a student.

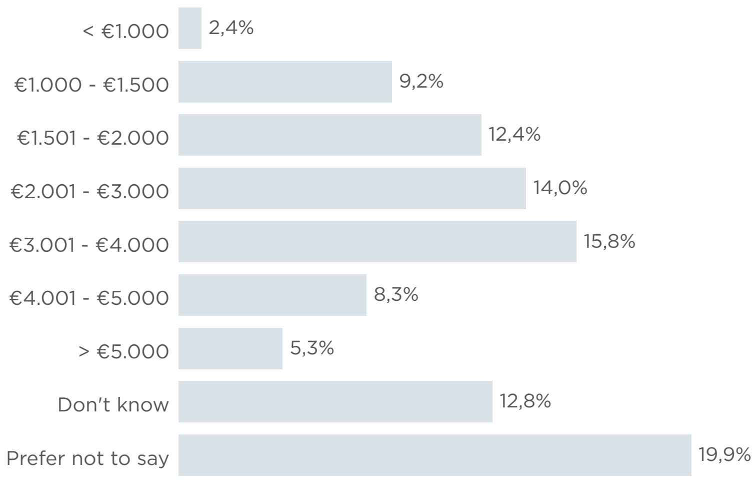


Graph 8: Population plotted by occupation (N=2.181)

HOUSEHOLD NET INCOME

Household net income is distributed normally, with most people (42,2%) having an income between €1.500 and €4.000. 2,4% has a family income of less than €1.000, 53% have a net income exceeding €5.000.
Remarkably, a large proportion of the sample does not know what the net income of their family is (12,8%), or prefers not to report their household net income (19,9%).

HOUSEHOLD NET INCOME



Graph 9: Population plotted by net income (N=2.181)

CHAPTER 01

TELEVISION

TV

CHAPTER 01

INFOGRAPHIC

TV:

Symbiosis between traditional and new forms of watching TV

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

97%
has access to a TV in his/her household

9%
only classic tube TV

76%
flat screen

29%
Smart TV

Use of Smart TV

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

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

19%
weekly

18%
weekly

Daily watching TV occurs on different devices

78%
TV

13%
LAPTOP

6%
TABLET

8%
SMARTPHONE

Live versus timeshifted

60%
claims to watch live/linear programming on a daily basis

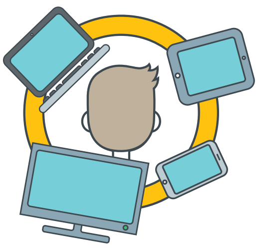
30%
claims to watch timeshifted content on a daily basis

Complementarity of traditional TV and new forms of TV consumption

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

hold their ground		new forms are rising	
86%	**78%**	**12%**	**26%**
subscription on digital TV	watching TV on TV set (daily basis)	Netflix	streaming films/series on computer (monthly basis)

Media multi-tasking



70%
uses the internet on one screen while watching audiovisual content on another screen.

Distraction versus interaction

64% distraction
(activity on second screen not related to TV program)

56% interaction
(activity on second screen related to TV program)

Types of interaction

46%	42%	28%	27%	13%
search for additional footage or information about the program	browse the site of the program	give opinion or talk about a program	look up information about a commercial seen on TV	vote or play along with the program

GENERAL FACTS & FIGURES
(N=2.181)

97,1%
have a TV in their household (-0,2 percentage points compared with last year)

8,6%
Only a classic tube TV (-5,0)

69,5%
Only a flat screen TV (+7,7)

19,1%
Both (-2,8)

88,5% own at least one type of flat screen in their household [1] (+4,8):

- 75,5% own a normal flat screen TV set (+2,3)
- 29,2% own a Smart TV (+3,1)
- 16,2% own both types of flat screen in their household (-0,1)

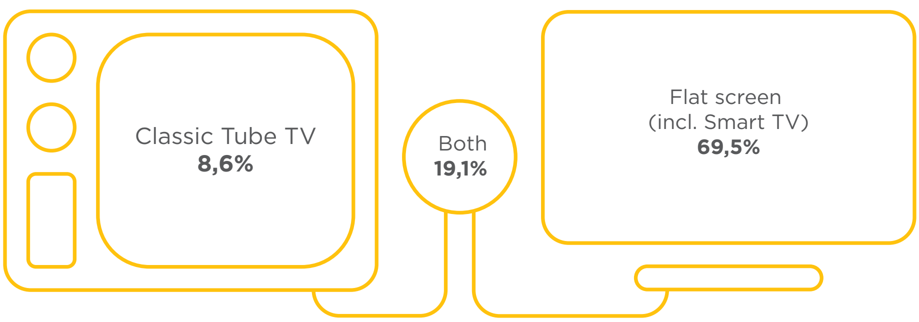
TV EQUIPMENT

CLASSIC TUBE TV VS. FLAT SCREEN TV

Flemish people who only have a classic tube TV in their houses, and no other type of television screen, are becoming increasingly rare (8,6%). Last year the total was still 13,6%. We have noticed that there is a strong correlation with age, with mainly older people indicating that they only own a classic tube TV. Nearly half (47,3%) of the respondents who only own a classic tube TV are at least 65 years old. Correspondingly, the level of adoption is a lot higher in this age category (17,7%) than for the total population (8,6%).

CLASSIC TUBE TV VS FLAT SCREEN TV

Total adoption TV Screens: **97,1%**



Graph 10: TV equipment: classic tube TV v. flat screen (N=2.181)

[1] The results are self-reported. As such, they reflect the perception of the respondents regarding the available screens in their household.

ONLY CLASSIC TUBE TV: BREAKDOWN BY AGE

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	2,3%	4,5%	9,2%	11,8%	18,0%	6,9%	47,3%	**100,0%**
Level of adoption by age	3,0%	2,7%	5,3%	6,1%	9,0%	8,2%	17,7%	**8,6%**

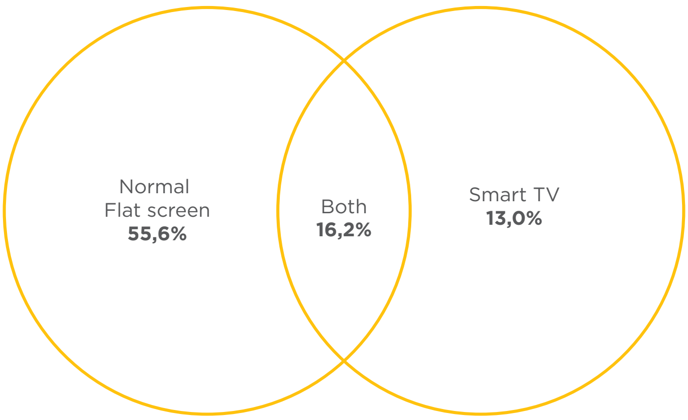
Table 1: Breakdown by age for having a classic tube TV as their only television set
(not having a flat screen television in the household; N= 187)

TYPE OF FLAT SCREEN

88,5% own at least one type of flat screen within the household. The most frequent type is still the ordinary flat screen (75,5%), whereas 29,2% have a Smart TV.
Ownership of a Smart TV in the home is highest in the younger segments (almost six out of ten owners of a Smart TV are under the age of 50). More highly educated people and those with a higher household income more often tend to have a Smart TV. Finally, Smart TVs are also mainly found in (larger) households with children.

TYPE OF FLATSCREENS

Total adoption of flat screens: **88,5%**



Graph 11: TV equipment: type of flat screen (N=2.181)

SMART TV PROFILING (N=559)

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION [2]
Gender			
Men	33,0%	55,4%	**113**
Women	25,6%	44,6%	**87**
Age			
15-19	42,8%	9,6%	**145**
20-29	34,2%	16,7%	**117**
30-39	34,4%	17,7%	**118**
40-49	33,4%	19,2%	**114**
50-59	30,5%	18,0%	**105**
60-64	18,6%	4,6%	**64**
65+	18,2%	14,3%	**62**
Degree			
No degree or primary education	18,8%	9,6%	**64**
Lower secondary education	26,1%	17,6%	**89**
Higher secondary education	32,3%	40,0%	**110**
Bachelor degree	31,8%	17,4%	**109**
Master or post-university degree	34,2%	15,4%	**117**
Household situation			
Single without children	19,1%	12,7%	**65**
Single with child(ren)	24,8%	4,1%	**85**
Married/living together without children	27,5%	27,4%	**94**
Married/living together with child(ren)	34,4%	32,5%	**117**
Living with both parents	37,0%	14,6%	**127**
Living with one parent	38,5%	7,3%	**130**
Living with others	23,4%	1,4%	**78**
Household members			
1	18,3%	12,2%	**63**
2	26,9%	32,0%	**92**
3	32,1%	18,9%	**110**
4	37,7%	25,8%	**129**
5	34,7%	7,4%	**119**
6	55,1%	3,5%	**184**
> 6	14,6%	0,2%	**50**

[2] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 55,4% of all Smart TV owners are men. Men only make up 49,0% of the population of Flanders aged 15 or more. The result is an index of 113, which indicates that men are overrepresented among Smart TV owners.

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION [2]
Occupation			
Student	37,0%	17,3%	**126**
Blue-collar worker	29,8%	8,0%	**101**
White-collar worker	35,0%	29,7%	**120**
Public servant/teacher	30,6%	10,1%	**105**
C-level (e.g.., CEO, CFO,...)	36,6%	1,4%	**127**
Self-employed	25,3%	4,0%	**87**
Liberal profession	23,2%	0,2%	**67**
Houseman/-wife	32,8%	2,7%	**113**
Unemployed	29,4%	8,1%	**100**
Retired	19,8%	18,5%	**68**
Other	0,0%	0,0%	**0**
Net income			
< €1.000	13,7%	1,1%	**46**
€1.000 - €1.500	20,7%	6,5%	**71**
€1.501 - €2.000	24,9%	10,6%	**85**
€2.001 - €3.000	25,9%	12,4%	**89**
€3.001 - €4.000	32,5%	17,5%	**111**
€4.001 - €5.000	39,9%	11,4%	**137**
> €5.000	47,7%	8,6%	**162**
Don't know	34,5%	15,1%	**118**
Prefer not to say	24,8%	16,8%	**84**

Table 2: Profiling of Smart TV adopters (N=559)

[2] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 55,4% of all Smart TV owners are men. Men only make up 49,0% of the population of Flanders aged 15 or more. The result is an index of 113, which indicates that men are overrepresented among Smart TV owners.

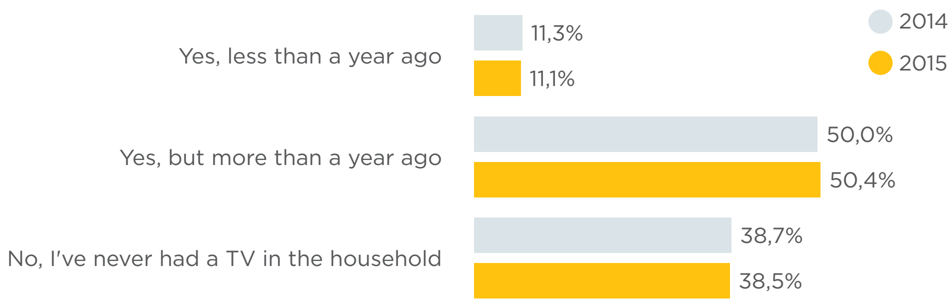
NOT HAVING TV AT HOME

2,9% do not have a television set at home. Half of the respondents who reported not having a TV in their household, did have a TV set more than a year ago. Four in ten people without a TV (38,5%) claimed they had never had a TV set at home.[3]

The main reason for not having a TV at home is a lack of interest or experiencing no need to watch TV (54,7%). One in five have another device to watch TV content, usually a laptop.[3]

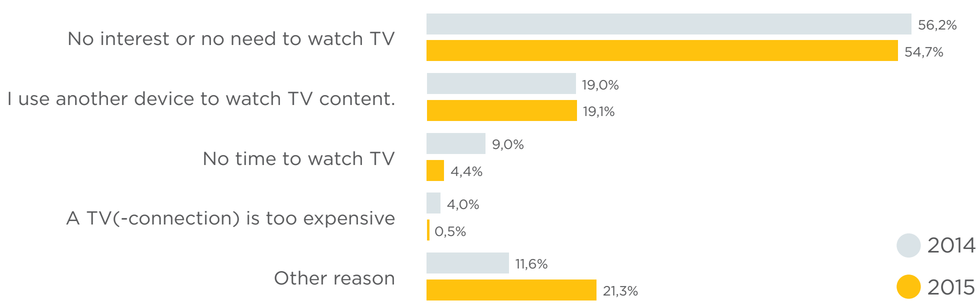
Two age groups are more likely not to have a TV at home: 20-39 year olds (because they own other devices for watching TV content, usually a laptop and/or a smartphone), and 65+ (mainly due to a lack of interest).[3]

DID YOU PREVIOUSLY HAVE A TV SET AT HOME?



Graph 12: Did you previously have a TV set at home (among people with no TV set at home, 2015: N=60; 2014: N=55)

REASONS FOR NOT HAVING A TV SET AT HOME



Graph 13: Main reasons for not having a TV set at home (among people with no TV set at home; 2015: N=60, 2014: N=55)

[3] Due to the low sample size (N=60), the results should be taken with caution.

NO TV SET: BREAKDOWN BY AGE

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	0,6%	29,5%	17,9%	10,3%	8,2%	4,4%	29,2%	**100,0%**
Level of adoption by age	0,2%	5,9%	3,4%	1,8%	1,4%	1,7%	3,7%	**2,9%**

Table 3: Breakdown by age of people with no TV set at home (N=60)

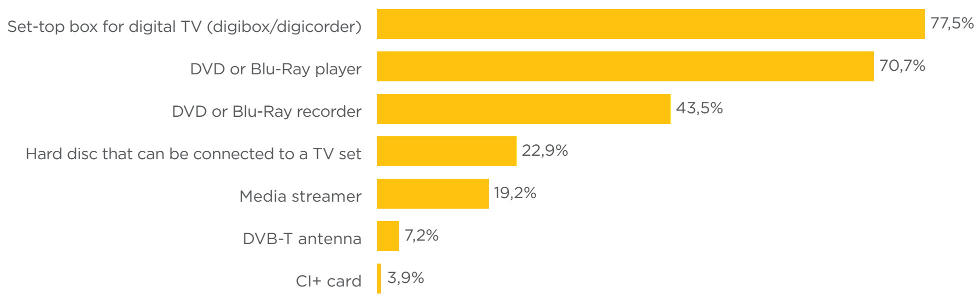
OTHER DEVICES

A large majority of Flemish people say they have a set-top box for digital television at home (77,5%) and/or a DVD or Blu-ray player (70,7%). In addition to the set-top box, a relatively small group watch digital TV by alternative methods such as a DVB-T antenna (7,2%) or a CI+ card (3,9%).[4]

Almost one in five (19,2%) say they have a media streamer at home to play online content on a TV screen. Google Chromecast (7,0%) and Apple TV (5,7%) are the most popular media streamers.

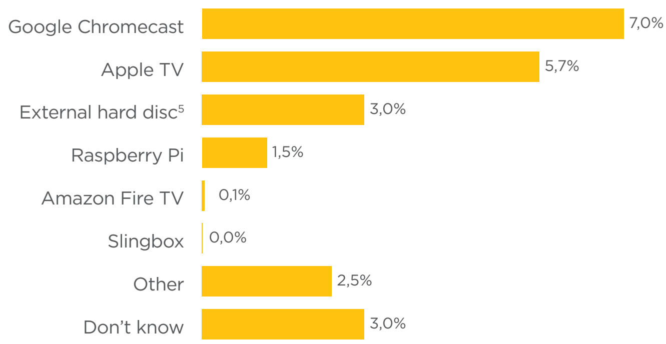
Ownership of media streamers is higher among men (24,2%) than women (14,5%). We can also see that the owners of media streamers tend to be younger (56,0% of media streamer owners are under the age of 40). More highly educated people, white-collar workers, executives and people with a high household income are strongly present in the segment of media streamer owners.

TV EQUIPMENT: OTHER DEVICES



Graph 14: TV equipment: Other devices (N=2.181)

TV EQUIPMENT: MEDIA STREAMERS



Graph 15: TV equipment: Media streamers (N=2.181)

[4] As a result of an overlap in the ownership of digital TV connections, the sum of these items (77,5% + 7,2% + 3,9% =88,6%) is greater than the number of people who have access to digital TV (85,6%).

[5] with integrated Wi-Fi to ensure that your ordinary TV can still be connected to the Internet for streaming Netflix or YouTube on your TV for example

MEDIA STREAMER PROFILING (N=420)

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION [6]
Gender			
Men	24,2%	61,6%	**126**
Women	14,5%	38,4%	**75**
Age			
15-19	33,8%	11,5%	**174**
20-29	30,4%	22,6%	**158**
30-39	28,0%	21,9%	**146**
40-49	27,4%	23,9%	**142**
50-59	15,6%	14,0%	**81**
60-64	5,9%	2,2%	**31**
65+	3,3%	3,9%	**17**
Occupation			
Student	30,6%	21,7%	**158**
Blue-collar worker	19,4%	7,9%	**100**
White-collar worker	26,9%	34,6%	**140**
Public servant/teacher	21,7%	10,8%	**113**
C-level (e.g.., CEO, CFO,...)	51,3%	3,0%	**273**
Self-employed	27,1%	6,5%	**141**
Liberal profession	6,9%	0,1%	**33**
Houseman/-wife	11,3%	1,4%	**58**
Unemployed	17,0%	7,1%	**88**
Retired	4,7%	6,6%	**24**
Other	9,2%	0,1%	**33**
Degree			
No degree or primary education	5,5%	4,2%	**28**
Lower secondary education	17,7%	18,1%	**92**
Higher secondary education	22,8%	43,0%	**119**
Bachelor degree	19,2%	16,0%	**100**
Master or post-university degree	27,2%	18,6%	**141**

TV

[6] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 61,6% of media streamer owners are men. Men only make up 49,0% of the population of Flanders aged 15 or more. The result is an index of 126, which indicates that men are overrepresented among media streamers.

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION [6]
Household situation			
Single without children	12,5%	12,7%	**65**
Single with child(ren)	22,9%	5,7%	**119**
Married/living together without children	14,7%	22,2%	**76**
Married/living together with child(ren)	22,9%	33,0%	**119**
Living with both parents	28,4%	17,0%	**148**
Living with one parent	24,2%	7,0%	**125**
Living with others	25,0%	2,3%	**128**
Household members			
1	11,5%	11,6%	**60**
2	15,9%	28,8%	**83**
3	20,9%	18,7%	**109**
4	27,3%	28,4%	**142**
5	28,1%	9,1%	**147**
6	34,1%	3,3%	**174**
> 6	2,7%	0,1%	**25**
Net income			
< €1.000	7,7%	1,0%	**42**
€1.000 - €1.500	6,7%	3,2%	**35**
€1.501 - €2.000	20,9%	13,5%	**109**
€2.001 - €3.000	19,3%	14,0%	**100**
€3.001 - €4.000	21,2%	17,4%	**110**
€4.001 - €5.000	30,7%	13,3%	**160**
> €5.000	40,4%	11,1%	**209**
Don't know	17,8%	11,8%	**92**
Prefer not to say	14,2%	14,7%	**74**

Table 4: Profiling of adopters: media streamers (N=420)

[6] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 61,6% of media streamer owners are men. Men only make up 49,0% of the population of Flanders aged 15 or more. The result is an index of 126, which indicates that men are overrepresented among media streamers.

TV CONNECTIONS

- The adoption of a digital TV subscription remains stable at 85,6%[7] (-0,3).

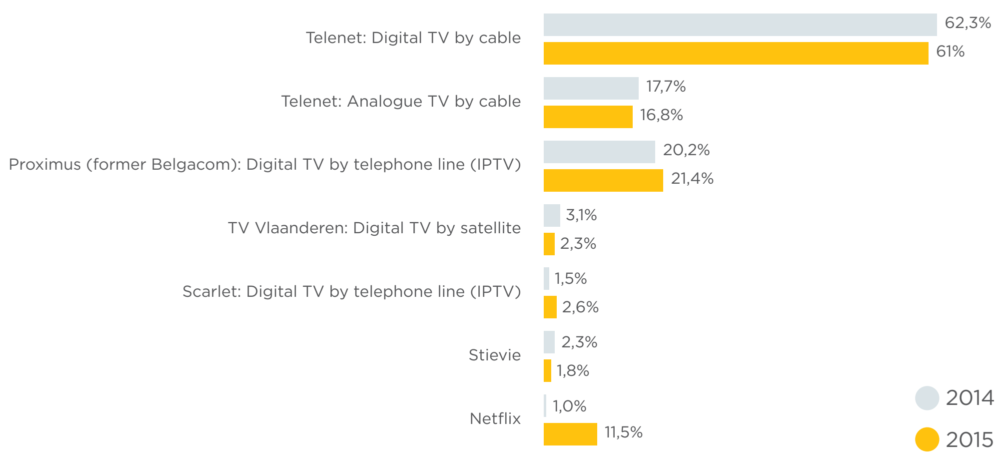
- The majority of Flemish people (61,0%) have a digital TV subscription using cable provided by Telenet.

- 16,8% still have an analogue TV connection.

- One year after its launch, 11,5% of the Flemish population report that they have access to a Netflix account. We wish to emphasise that this figure only indicates how many people have access to a Netflix account, not how many unique subscriptions there are in Flanders. In view of the fact that a Netflix account can be shared within the household and frequently outside the household as well,[8] the percentage with access to Netflix is a multiple of the number of subscriptions. Taking this into account, we estimate the number of unique Netflix subscriptions in Flanders to be between 120.000 and 155.000.

- Use of Stievie remained stable, with a share of about 2% of the Flemish population (1,8%; a drop of 0,5 percentage points). However, we cannot exclude the possibility that there is some confusion with the programs on the Medialaan broadcasting channels that are available for free online under the "Stievie Free" label or through the VTM app or website. In other words, the 1,8% figure is probably a combination of paying users of the "classic" Stievie app and free users of the opportunity to watch or rewatch Medialaan programs online. If we take into account the same scaling factor as for a Netflix account (see above), then we can estimate that there were about 19.000 to 24.000 Stievie accounts (or the free version of it) in circulation at the time of the survey in August and September.

TV CONNECTIONS



Graph 16: TV connections (2015: N=2.181, 2014: N=2.028)

[7] A small section of the population (1,9%) have more than one digital subscription, which explains why 61,0% + 21,4% + 2,3% + 2,6% does not equal 85,6%.

[8] The digiMeter Netflix study showed that a Netflix subscription is often not only shared within the household, but also with family or friends outside of the household. This means that a Netflix account can often be used by 4 to 5 different people. Further information about the digiMeter Netflix study: http://bit.ly/dM_Netflix

USE OF DIGITAL TELEVISION FUNCTIONS

- The most popular functions of digital TV used on a daily basis remain the same as last year: the electronic program guide (EPG) (57,2%) (-2,3), ad skipping (48,7%) (-3,0) and recording a program or movie (37,9%) (+0,2).

- The functions that are used least on a daily basis are participating /voting in a TV program (0,2%), pay-per-view (0,4%) and requesting a paid preview of a program (0,5%). The low score for participation/voting in a TV program and requesting a paid preview of a program is due to the fact that the number of people who have ever done this is low to start with (resp. 20,1% and 15,8%). As for pay-per-view, this is due to the fact that this is used less frequently. Thus we find that almost 15% of people pay for a program, film or series on a monthly basis, while 53% say they have done this at some time or another.

- The ability to skip ads remains a popular feature of digital television (48,7% report that they skip ads on a daily basis[9]). However, for the second year in a row, the willingness to pay extra for this function has decreased. Only 22,2% explicitly state that they are willing to pay extra for ad-skipping possibilities. Last year this was 28,3%, and in 2013 it was as much as 33,5%. Almost six in ten respondents would rather lose this feature than pay extra (58,1%), which is 7,6 percentage points higher than last year. Almost one in five (19,7%, which is 1,4 percentage points lower than last year) claim they would cancel their digital television subscription if ad-skipping became a paid privilege. This development seems to suggest that Flemish TV consumers are becoming less frustrated by the commercials shown on TV. They would rather lose the ability to skip ads than to pay extra for that feature or cancel their digital TV subscription.

- Over four in ten people in Flanders have access to an additional subscription for pay TV content. Most popular are services for films/series on demand (18,1%) and sports packages (8,9%).

THE USE OF DIFFERENT FUNCTIONALITIES ON DIGITAL TELEVISION

	EVER	MONTHLY	DAILY	EVOLUTION DAILY 2015-2014
Checking the electronic program guide	87,2%	78,1%	57,2%	**-2,3**
Skipping ads	79,2%	69,9%	48,7%	**-3,0**
Recording a program or a film	87,8%	79,2%	37,9%	**+0,2**
Listening to radio channels	60,6%	32,4%	11,1%	**+2,3**
Using internet applications	28,7%	15,8%	10,7%	**-3,2**
Watching a free program	59,6%	28,3%	6,0%	**+1,7**
Setting a reminder	44,7%	22,9%	5,6%	**-2,8**
Watching content from a pay TV subscription	29,0%	15,9%	4,6%	**-0,6**
Watching paid channels	15,8%	8,9%	3,4%	**-0,1**
Requesting a paid preview of a program	15,2%	2,8%	0,5%	**+0,3**
Pay-per-view	52,9%	14,9%	0,4%	**+0,1**
Participating/voting in a TV program	20,1%	2,8%	0,2%	**-0,7**

Table 5: The use of different functionalities on digital TV (on people having access to Digital TV in their household; 2015: N=1.838, 2014: N=1.743)

[9] However, this does not mean that 48,7% 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?	2015	2014
Current price without ability to skip ads	58,1%	50,5%
Stop digital TV subscription	19,7%	21,1%
At a smaller extra cost with limited ability to skip ads	11,8%	12,7%
At extra cost with the ability to skip ads	10,4%	15,6%

Table 6: The willingness to pay for ad skipping (on people having access to Digital TV in their household; 2015: N=1.838, 2014: N=1.743)

ADDITIONAL SUBSCRIPTIONS FOR PAY TV CONTENT

	2015	2014
Films/series on demand (e.g. Netflix, Telenet Play & Play More,...)	18,1%	12,0%
Sports package (e.g. Belgacom 11)	8,9%	10,6%
Package of pay TV channels	6,1%	6,1%
Other	1,9%	1,6%
None of these	56,2%	74,7%

Table 7: Additional pay TV subscriptions (on total sample; 2015:N=2.181, 2014: N=2.028)

SMART TV OWNERS = SMART TV USERS?

- Owning a Smart TV does not mean that you effectively use its “smart” functionality. A quarter of the Smart TV owners say they have never used an application on their Smart TV, and simply use it as a TV screen.

- The most popular apps on a Smart TV are content apps such as YouTube and Netflix. Over half of all Smart TV owners (56,0%) say they have already used YouTube on their Smart TV. Almost 1 in 5 (18,7%) say they use it on a weekly basis. Almost 3 in 10 respondents (27,8%) say they have already used the Netflix app on their Smart TV.

- The youngest segments mainly (15-29 yrs) use the various apps most frequently. The only exception to this rule is the consultation of the electronic program guide of a Smart TV; this is higher for the older segments with a Smart TV (12,2%) than among the younger Smart TV owners (8,8%).[10]

- Almost everyone who owns a Smart TV (among others) uses a remote to operate it (92,1%). Almost 1 in 5 (19,7%) respondents say they use an app on their smartphone or their tablet to operate their Smart TV. Voice control or gestures are rarely used (resp. 1,8% and 1,1%).

[10] Although we explicitly stated in the questionnaire that we did not mean the electronic program guide of the set-top box for digital TV, we cannot rule out the possibility that this relatively high figure, especially in the older segments, also contains users who use the EPG of the set-top box but who wrongly assume that this is the EPG of the Smart TV interface

AMONG FLEMINGS WHO OWN A SMART TV, WHAT PERCENTAGE HAVE...

Ever used an app on Smart TV	74,7%
Never used an app on Smart TV	25,3%

Table 8: Ever used an app on Smart TV (on people owning a Smart TV in the household; N=559)

HOW OFTEN DO YOU USE THE FOLLOWING APPS ON A SMART TV?

	EVER	MONTHLY	WEEKLY
YouTube	56,0%	30,6%	**18,7%**
Netflix	27,8%	20,0%	**17,5%**
Social media (e.g. Facebook)	24,6%	12,4%	**11,0%**
Consulting the electronic program guide (NOT through the digital TV set-top box)	25,2%	12,6%	**10,8%**
Recording programs (NOT through the digital TV set-top box)	20,8%	11,0%	**9,0%**
DLNA (wireless sending of files from your computer, smartphone or tablet to your Smart TV)	32,0%	16,1%	**8,8%**
Surfing (e.g., using your Smart TV to Google something)	36,4%	13,9%	**8,5%**
Music app (e.g., Spotify)	23,9%	12,4%	**8,0%**
Games (NOT through the digital set-top box)	13,5%	6,2%	**5,5%**
Video chat (e.g., through Skype)	20,9%	9,5%	**5,5%**
Other	5,7%	3,3%	**2,4%**

Table 9: Frequency of app use on Smart TV (on people owning a Smart TV in the household; N=559)

BREAKDOWN BY AGE FOR WEEKLY USE OF APPS ON SMART TV

	15-29	30-49	50+	TOTAL
YouTube	29,1%	16,5%	13,3%	**18,7%**
Netflix	25,0%	22,5%	6,9%	**17,5%**
Social media (e.g. Facebook)	21,1%	9,7%	4,8%	**11,0%**
Consulting the electronic program guide (NOT through your digital TV set-top box)	8,8%	11,0%	12,2%	**10,8%**
Recording programs (NOT through your digital TV set-top box)	10,2%	8,7%	8,5%	**9,0%**
DLNA (wireless sending of files from your computer, smartphone or tablet to your Smart TV)	9,7%	9,5%	7,5%	**8,8%**
Surfing (e.g., using your Smart TV to Google something)	16,2%	7,8%	3,6%	**8,5%**
Music app (e.g., Spotify)	13,8%	7,9%	4,0%	**8,0%**
Games (NOT through the digital set-top box)	8,8%	5,3%	3,2%	**5,5%**
Video chat (e.g., through Skype)	8,2%	4,9%	4,3%	**5,5%**

Table 10: Breakdown by age for weekly use of apps on Smart TV (on people owning a Smart TV in the household; N=559)

HOW DO YOU OPERATE YOUR SMART TV?

With the remote (that was supplied with it)	92,1%
Using an app on a smartphone or tablet	19,7%
Speech recognition	1,8%
Gestures	1,1%
Other	3,3%

Table 11: How do you operate your Smart TV? (on who owns a Smart TV at home; N=559)

WATCHING TV CONTENT

- 3,1% of the Flemish population never watches TV content on any device (+0,1).
- The TV screen continues to be the most popular screen for watching TV content. Almost three quarters of the Flemish population (77,5%) say they watch TV content on a TV screen daily[11], which is a similar situation to last year (-0,7). The daily use of a computer (-1,7) and a smartphone (+1,0) to watch TV content has remained relatively stable. The decline in the daily watching of TV content on a tablet is remarkable, however (-3,6%).
- 44,5% (-1,5) report they watch 1-3 hours of TV on a television set every day. One in five (20,1%) claim to watch at least 3 hours a day (+2,4).
- 27,8% watch TV content at least once a week on a laptop, 14,3% on a tablet, and 15,8% on a smartphone.
- There is a clear correlation between age and watching TV content on other screens. Almost 70% of the under-30s watch TV content on a laptop on a weekly basis. This is significantly higher than the figure of 27,8% for the overall population. Consequently, the profile of people who watch TV content weekly on a laptop is also relatively young, with 52,1% younger than 30. The category of people using a smartphone weekly for watching TV also has a younger profile (51,8% younger than 30). In the category of 15-19 year-olds almost half (49,1%) say they use their smartphone weekly to watch TV content. For 20-29 year-olds this amounts to 35,0%. In both cases, this is significantly higher than the 15,8% for the overall population. The tablet user has a somewhat older profile. Two out of three (66,8%) people who use a tablet for watching TV content weekly are between the ages of 20 and 49 years.
- Watching television is increasingly becoming a multiscreen activity, with "the large television screen in the living room" still being the standard for the average Flemish person. 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 deferred viewing are represented in their viewing behaviour (regardless of the actual time spent and the device used), we can conclude that live television upholds its weight in the viewing habits of the Flemings, with 60% claiming to watch live content every day. Timeshifted viewing remains stable at about 30%. Alternative forms of watching TV content are still less common on a daily basis.

[11] This may not be interpreted as the amount of television time that is spent watching linear TV.
This merely indicates how many Flemings have the perception of watching live/linear TV content on a daily basis.

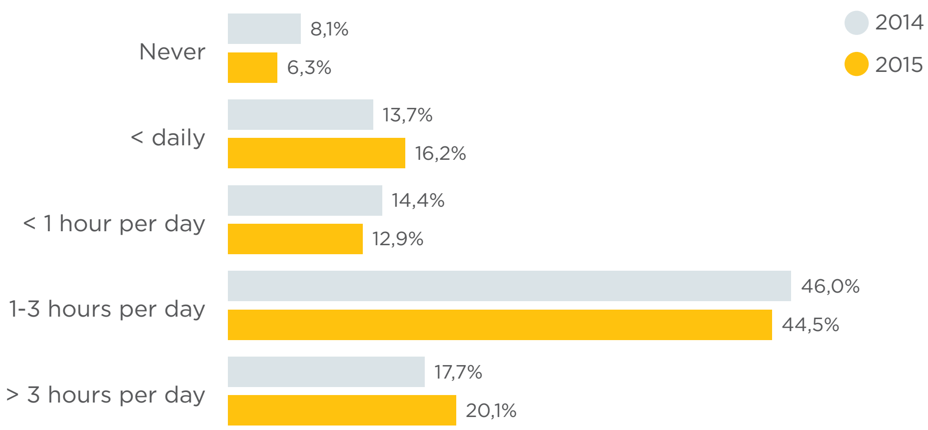
- The way TV content is consumed is highly dependent on the age of the viewer. Watching live/linear TV remains popular within all age groups. Overall, 74,7% state to watch (at least once) live/linear tv on a weekly basis. However, it is striking to see that timeshifting equals or even tops live viewing among the two youngest age groups. Among the 15-19 year olds respectively 65,5% and 64,9% state that they watch live and timeshifted at least once per week. Among the 20-29 year olds, this makes up for 58,8% for live viewing and 61,0% for timeshifted viewing[12]. Among the 65+ segment, linear television is by far the most common way to watch TV on a weekly basis (87,9%); less than half of those aged 65 or older report watching in time shifted mode (43,3%), and other types of viewing are rarely done on a weekly basis by the oldest age group (< 7%). Not surprisingly, the youngest profiles (15-19 and 20-29 year olds) are the most familiar with watching TV content via downloads (resp. 40,9% and 51,6%) and via streaming websites (50,2% and 58,6%).

DAILY WATCHING TV CONTENT ON DIFFERENT DEVICES

	2015	2014
TV set	77,5%	78,2%
Laptop/desktop	13,1%	14,8%
Tablet	5,6%	9,2%
Smartphone	8,2%	7,2%

Table 12: Daily watching TV content on different devices (2015: N=2.181, 2014: N=2.028)

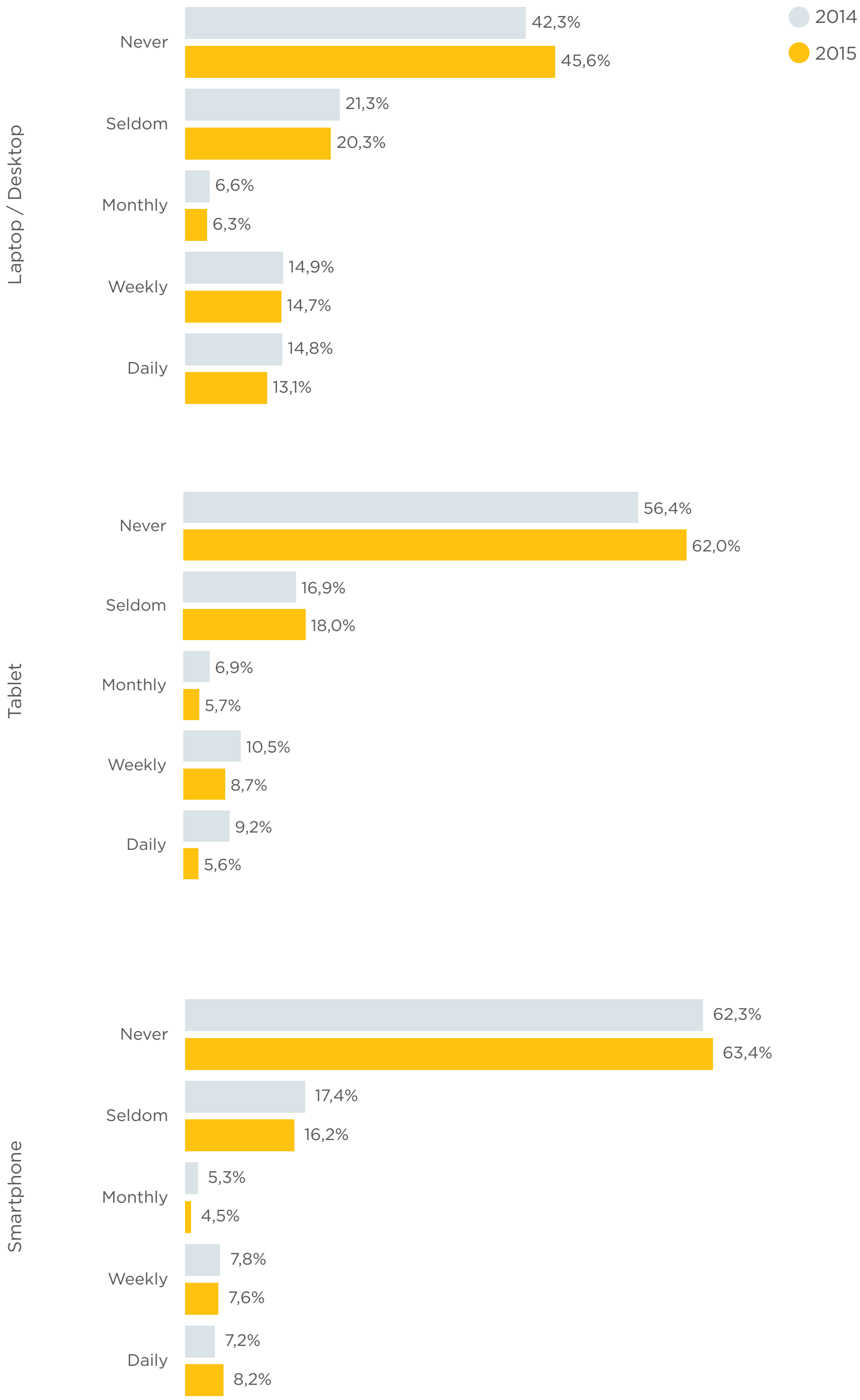
FREQUENCY OF WATCHING TV CONTENT ON TV SET



Graph 17: Frequency of watching TV content on a TV set (2015: N=2.181, 2014: N=2.028)

[12] 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 spent per type of TV consumption. The results show how the Flemish perceive their TV content consumption.

FREQUENCY OF WATCHING TV CONTENT ON OTHER DEVICES



Graph 18: Frequency of watching TV content on other devices (2015: N=2.181, 2014: N=2.028)

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

LAPTOP	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	16,3%	35,8%	19,5%	11,8%	7,2%	1,7%	7,6%	**100,0%**
Weekly use by age	69,0%	69,7%	36,1%	19,6%	11,7%	6,7%	9,3%	**27,8%**
TABLET								
Age profile	11,9%	22,4%	21,4%	23,0%	13,0%	3,9%	4,3%	**100,0%**
Weekly use by age	26,2%	22,6%	20,5%	19,8%	10,8%	7,8%	2,7%	**14,4%**
SMARTPHONE								
Age profile	20,3%	31,5%	21,1%	13,3%	9,6%	2,3%	1,9%	**100,0%**
Weekly use by age	49,1%	35,0%	22,3%	12,5%	8,9%	5,0%	1,3%	**15,8%**

Table 13: Weekly watching TV content on other devices (2015: N=2.181, 2014: N=2.028)

WAYS TO WATCH TV CONTENT

	EVER	MONTHLY	DAILY	EVOLUTION DAILY 2015-2014
Live/Linear	93,9%	81,9%	60,0%	**-3,3**
Timeshifted viewing	77,9%	69,2%	29,6%	**-1,6**
Downloads of films/series	45,6%	26,4%	6,1%	**N/A**
On demand using digital TV (e.g. Ooit Gemist, iWatch,...)	37,8%	12,4%	1,4%	**N/A**
Using streaming websites	47,7%	30,8%	10,3%	**-1,6**
Using TV apps	28,6%	12,7%	2,0%	**-2,2**
DVDs	60,0%	23,2%	1,3%	**-2,7**
Using an additional paid pack for films/series	25,2%	18,7%	6,5%	**N/A**
Paid TV channels for sports	12,7%	7,9%	1,1%	**N/A**

Table 14: Ways to watch TV content (2015: N=2.181, 2014: N=2.028)

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

LIVE	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	5,8%	11,3%	11,7%	18,1%	17,5%	8,7%	27,0%	**100,0%**
Weekly use by age	65,5%	58,8%	58,1%	80,7%	75,7%	89,9%	87,9%	**74,7%**
TIMESHIFTED								
Age profile	7,2%	14,7%	15,1%	19,8%	18,6%	7,8%	16,8%	**100,0%**
Weekly use by age	64,9%	61,0%	59,6%	69,9%	63,8%	63,8%	43,3%	**59,2%**
DOWNLOADS								
Age profile	15,3%	42,0%	19,1%	11,9%	5,3%	1,1%	5,3%	**100,0%**
Weekly use by age	40,9%	51,6%	22,3%	12,5%	5,4%	2,6%	4,1%	**17,5%**
ON DEMAND USING DIGITAL TV								
Age profile	8,0%	16,9%	14,4%	25,4%	16,4%	8,7%	10,1%	**100,0%**
Weekly use by age	7,8%	7,6%	6,1%	9,7%	6,1%	7,7%	2,8%	**6,4%**
STREAMING WEBSITE								
Age profile	14,6%	37,0%	20,2%	16,8%	6,6%	1,1%	3,8%	**100,0%**
Weekly use by age	50,2%	58,6%	30,5%	22,6%	8,7%	3,4%	3,7%	**22,6%**
TV APP								
Age profile	10,9%	22,5%	16,9%	21,7%	13,7%	6,3%	7,9%	**100,0%**
Weekly use by age	11,2%	10,6%	7,6%	8,7%	5,3%	5,9%	2,3%	**6,7%**
DVD								
Age profile	9,7%	18,6%	15,7%	10,2%	22,3%	7,0%	16,5%	**100,0%**
Weekly use by age	13,4%	11,8%	9,4%	5,5%	11,7%	8,8%	6,5%	**9,0%**
PAID PACKAGE: FILM/SERIES								
Age profile	10,6%	19,7%	24,2%	21,1%	11,3%	2,4%	10,7%	**100,0%**
Weekly use by age	23,6%	20,1%	23,5%	18,3%	9,6%	4,8%	6,8%	**14,6%**
PAID PACKAGE: SPORTS CHANNELS								
Age profile	5,4%	18,6%	17,8%	19,2%	24,1%	2,9%	12,0%	**100,0%**
Weekly use by age	5,0%	7,9%	7,2%	6,9%	8,5%	2,4%	3,2%	**6,1%**

Table 15: Breakdown by age for ways to watch TV content on a weekly basis (N=2.181)

USING INTERNET WHILE WATCHING TV

- Using the internet while watching TV (the so-called “media multitasking”) has become a common practice. 69,9% (+0,1) say that they have engaged in an online activity while watching TV at least once last month.

- Last year, we reported a shift towards more program-related activities. This year the figures have stabilised, with 64,4% (+3,4) doing something that is not related to the TV program and 56,4% (-0,7) doing an internet activity in the past month that was related to the TV program they were watching at the time. In many cases multi-device use continues to cause a lot of “distraction”, but more than half of all Flemish people also “interact” with the TV content. There are almost no changes in these “interaction” activities, compared with last year (see below).

- This year we have not found any major changes in the activities that Flemish people engage in on the Internet when watching TV. Last year, surfing to the program’s website had increased by 23,3 percentage points. This has now stabilised at 41,5% (+1,5) of all Flemish people who regularly use their mobile device to surf to the website of the program they are watching on their TV screen. Last year, searching for additional visual material increased significantly by 20,4 percentage points whereas the increase this year is “only” 2,6 percentage points. Like last year, voting in/participating in a TV program (e.g., with a second screen app) is a less frequently occurring activity, with only 1 in every 8 Flemish people engaging in this in the past month. Almost 3 out of 10 Flemish people say that they have shared their opinion about a program online in the past month (27,8%). It is striking that searching for information about a TV ad remained stable at about 30% (27,2%).

- Generally speaking, the computer (laptop or desktop) is still the most frequently used device for engaging in an internet activity while watching a TV program. We did notice however that this year smartphones have managed to catch up (which is, of course, closely linked to the ever-increasing level of adoption of smartphones, whereas computer ownership has stabilised). There is hardly any difference any longer for sharing one’s opinion about a program; for participation and/or voting in a program, a slightly higher number of Flemish people are now using their smartphone instead of the computer. In line with the decreased use of the tablet in general(see Tablet chapter), we see that tablets are becoming less important for media multitasking and that smartphones are increasingly taking over this role.

- Although there is still a correlation between age and media multitasking (the younger the profile, the larger the share of respondents that engaged in media multitasking in the past month), this is not uncharted territory even for the older profiles. Almost 4 out of 10 (42,6%) of the over-65s say they have engaged in an internet activity while watching TV during the past month. Last year this was still only 36,5%.

- Facebook by far is still 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 (5,0%). Compared to last year, Twitter has become a less popular channel (-3,8), while Google+ has gained 5,8 percentage points.

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

	DEKSTOP/ LAPTOP	SMART-PHONE	TABLET	SMART TV	GAME-CONSOLE	TOTAL (ON ANY DEVICE)	EVOLUTION 2015-2014
To give my opinion or to talk about a program	15,1%	14,2%	6,5%	0,4%	0,7%	27,8%	**+2,9**
To be able to vote or play along with the program	2,7%	4,6%	2,0%	1,2%	0,2%	12,5%	**+2,7**
To search for additional footage or information about the program	24,1%	19,2%	14,3%	2,5%	0,2%	45,5%	**+2,6**
To browse to the site of the program	25,3%	14,7%	11,0%	1,3%	0,2%	41,5%	**+1,5**
To look up information about a commercial I saw on TV	14,2%	9,2%	6,6%	0,4%	0,1%	27,2%	**+1,2**
For a reason not related to the program	43,3%	34,1%	23,3%	1,0%	0,7%	64,4%	**+3,4**

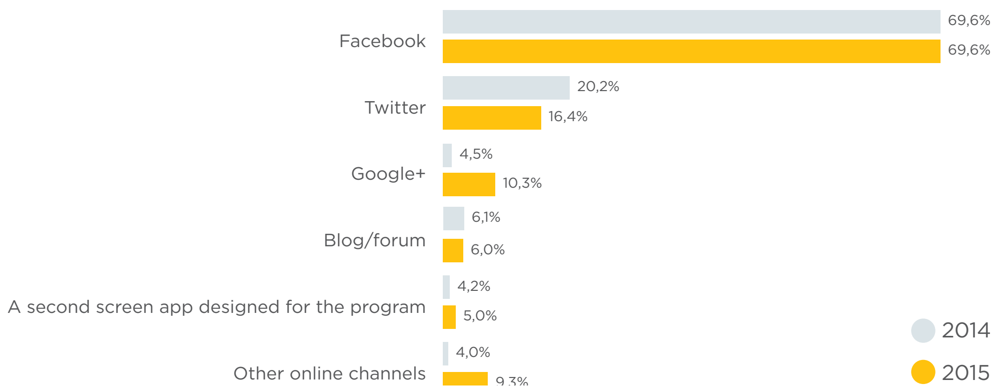
Table 16: Use of the internet while watching TV (2015: N=2.181, 2014: N=2.028)

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
Age profile	8,7%	18,9%	18,0%	19,4%	14,9%	6,0%	14,0%	**100,0%**
Weekly use by age	93,2%	92,7%	83,9%	81,0%	60,4%	58,5%	42,6%	**69,9%**

Table 17: Breakdown by age for use of the internet while watching TV (N=2.181)

CHANNELS TO GIVE AN OPINION OR TO TALK ABOUT THE PROGRAM

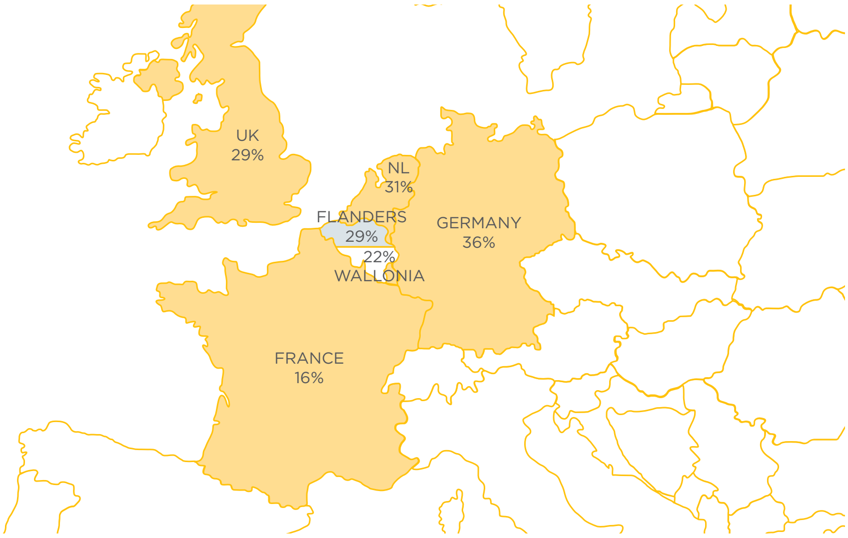


Graph 19:Channels to give an opinion or to talk about the program
(on people who claim to use internet to give an opinion or to talk about the program; 2015: N=606, 2014: N=506)

FRAMING THE DATA

SMART TV

Almost three out of ten Flemings report that they have a Smart TV within their household. This score places Flanders comfortably at the level of its neighboring countries. Germany has the highest adoption rate (36%),[1] followed by the Netherlands (31%).[2] The UK has the same level as Flanders (29%),[3] while Wallonia (22%)[4] and France in particular (16%)[5] have lower adoption rates for Smart TVs.



Graph 20: Adoption of Smart TVs in Flanders and neighboring regions

TV

[1] Source: Smartclip.com (in collaboration with Nielsen) – “Smart TV insights 2015 – Germany” (http://bit.ly/Nielsen_SmartTVgermany)

[2] Source: Stichting Kijkonderzoek (SKO) – Press release “Tv in Nederland 1e helft 2015” (http://bit.ly/SKO_TVstudy)

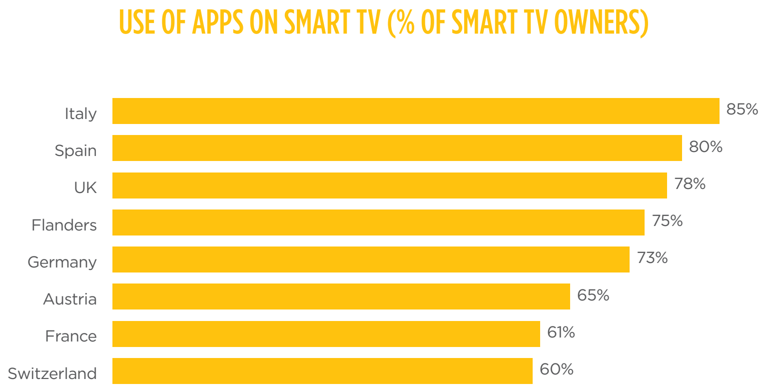
[3] Source: Smartclip.com (in collaboration with Nielsen) – “Smart TV insights 2015 – UK” (http://bit.ly/Nielsen_SmartTVuk)

[4] Source: Digital Wallonia – “Baromètre 2015 des usages numériques des citoyens wallons” (http://bit.ly/DigiWal_Barometre2015)

[5] Source: Ofcom – International Communications Market Report 2014 (extrapolated to 2015) (http://bit.ly/Ofcom_ICMR2014)

This clearly shows that Smart TVs are no longer gimmicks, but are increasingly being adopted (including in neighboring countries). This is also reflected in the sales of televisions, which show a growing share of Smart TVs. According to GfK, 44% of all the sold TVs in Europe in 2014 were Smart TVs, with a sales peak in Germany at 57%.[6] According to another GfK report, 73% of all televisions sold in the Netherlands in 2015 have been Smart TVs.[7]

Buying a Smart TV does not necessarily mean watching TV in completely different way. digiMeter results show that three quarters of the Flemings who own a Smart TV have used an app on the device. This score brings Flanders at the same level as Germany, with only Italy, Spain and UK ahead.[8]



Graph 21: Use of apps on Smart TV (sample: respondents with a Smart TV at home). Source: digiMeter 2015 (Flanders) and GFU (remaining figures Europe)

NETFLIX

At the end of the third quarter of 2015, Netflix had 69,2 million accounts worldwide, 66,0 million of which paid for their subscription.[9] In addition to these 66 million paying streaming customers, Netflix also nearly has 5 million customers for their DVD rental service, the service Netflix started out with almost 20 years ago.[10]

[6] Source: GFU (in collaboration with GfK) – "TV-Markt 2014 in Westeuropa" (http://bit.ly/GfK_TV2014WE)

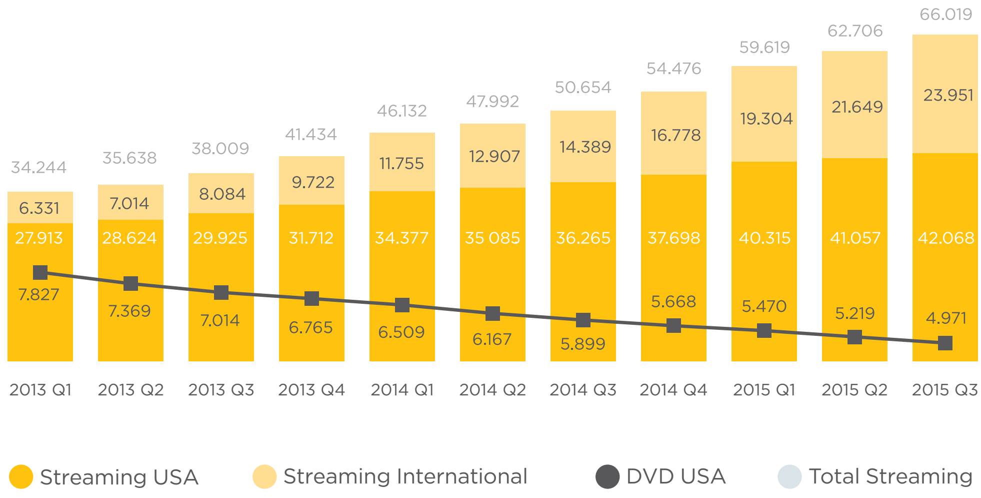
[7] Source: GfK – "Retail Reports – Nederland – Q1 2015" (http://bit.ly/GfK_RetRep2015Q1)

[8] Source: GFU – "Was sich Konsumenten wünschen und wo sie skeptisch sind. Ergebnisse einer europaweiten gfu-Studie" (http://bit.ly/GFU_Trends2015)

[9] Source: Netflix Quarterly Earnings – 2015 Q3 (http://bit.ly/Netflix_2015Q3)

[10] Source: CNN – "A brief history of Netflix" (http://bit.ly/CNN_NetflixHistory)

NETFLIX - PAID MEMBERS (IN THOUSANDS)



Graph 22: Paying Netflix members (figures in thousands). Source: quarterly figures Netflix 2015 Q3

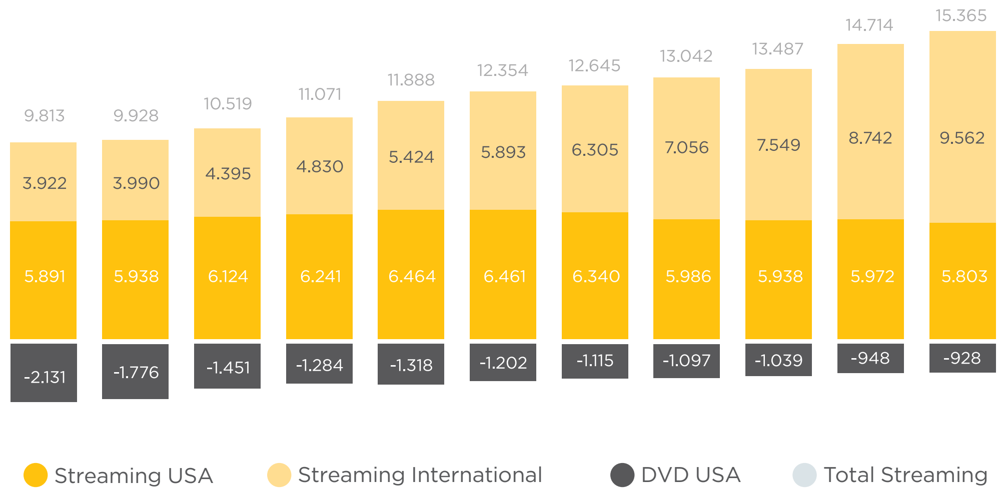
While the DVD service is declining quarter over quarter, the number of users paying for the streaming platform is still increasing. In the third quarter of 2015, Netflix had 15 million more paying streaming users than the year before. The biggest growth factor has been customers outside the US, with 9,6 million more paying users than the year before. The US itself accounted for 5,8 million new users. It should be noted that growth in the US has shown a slight decline since early 2014. New users are still joining, but growth is getting smaller. Growth in other countries is up because Netflix is becoming available in more and more countries. In September 2014, new countries included Belgium, France and Germany, and Netflix has since added Australia, New Zealand, Spain, Portugal, Italy[11] and Japan (as their first Asian market). The fact that Netflix has started to operate in Asia will prove an interesting test case for their further expansion. Netflix is certainly willing to make an effort to adapt to the local (viewing) culture in Japan: 40% of the available content will consist of local films and series (compared to an average of 20% in other countries), and Netflix also signed a deal with Japanese telecom giant Softbank (boasting 37 million mobile customers) to develop simple mobile payment methods for Netflix' monthly subscription, and to pre-install the Netflix app on smartphones released by Softbank.[12] The question remains if this will be enough to gain foothold in Japan.[13]

[11] Source: Forbes – "Launching into Spain, Italy and Portugal makes sense for Netflix" (http://bit.ly/Netflix_SpainItalyPortugal)

[12] Source: Digital Trends – "Netflix launches in Japan, though it's doing things a little differently there" (http://bit.ly/DigTrends_NFXjapan)

[13] Source: Forbes – "Netflix Japan launch over-hyped, over-valued" (http://bit.ly/Forbes_NFXjapan)

NETFLIX - PAID MEMBERS - EVOLUTION SAME QUARTER PREVIOUS YEAR (IN THOUSANDS)

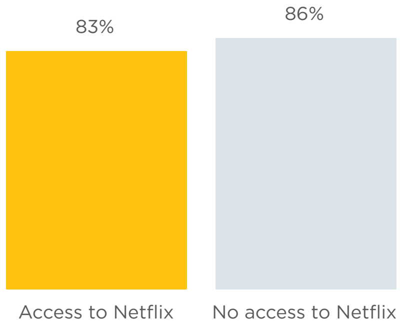


Graph 23: Paying Netflix members (figures in thousands) - evolution compared to the same quarter the year before.
Source: quarterly figures Netflix

The digiMeter Netflix study[14] showed that Netflix subscriptions do not necessarily come at the expense of digital television subscriptions. Both platforms are considered complementary. Netflix focuses on (mainly American and British) series and movies. Flemish content, news, game shows and talk shows are the assets of the Flemish broadcasters, which are still appreciated by Flemish viewers. When we look at the people with a digital television subscription, results of digiMeter do not show any significant differences between those with or without access to Netflix. Neither do the results show any differences for daily timeshifted viewing. There are however differences in the share of people indicating that they watch a live TV program on a daily basis. 60,9% of those who do not have access to Netflix watch live programs every day, while only 37,2% of those with access to Netflix do the same. This means that there is a substantial group of people within the Netflix subscribers who seem to be moving away from watching linear programs and have adopted a more flexible view on television. This does however not mean that they stopped watching live TV; 61,3% do so every week (versus 76,4% of those without Netflix), and 70,6% watch linear TV every month (versus 80,4% of those without Netflix).

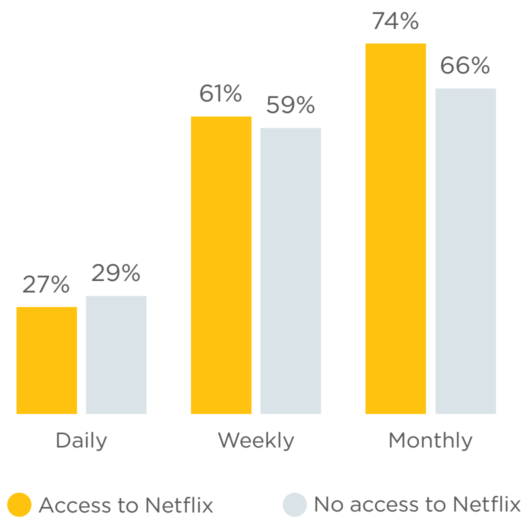
[14] More information on the digiMeter Netflix study via: http://bit.ly/dM_Netflix

DIGITAL TELEVISION SUBSCRIBERS WITH OR WITHOUT NETFLIX ACCESS

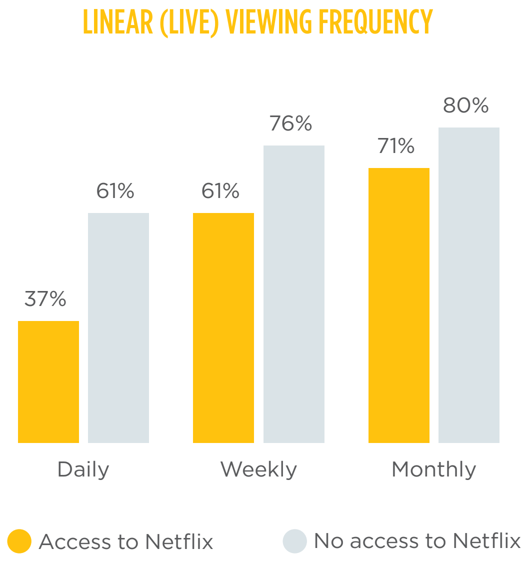


Graph 24: Access to digital television within the household - split between those with and without access to Netflix (source: digiMeter 2015)

TIMESHIFTED VIEWING FREQUENCY



Graph 25: Delayed viewing frequency - split between those with and without access to Netflix (source: digiMeter 2015).
Note: 'weekly' covers all those who watch timeshifted television at least once a week, so including daily. Similar for 'Monthly'.



Graph 26: Linear (live) viewing frequency - split between those with and without access to Netflix (source: digiMeter 2015).
Note: 'weekly' covers all those who watch timeshifted television at least once a week, so including daily. Similar for 'Monthly'.

OTHER SCREEN MONITOR (CIM)

In 2014, the CIM[15] launched the Other Screen Monitor,[16] a biannual online survey on watching TV content on alternative screens. In April 2015, a third wave took place.
Let us first take a brief look at the penetration figures published in the Other Screen Monitor report. The CIM defines penetration not as possession or access to a device, but as usage of the device. This is a different approach from digiMeter, where adoption is determined by the availability of the technology within the household. If we look at the percentage that has access to a device and effectively uses it, the digiMeter figures are close to those published by the CIM. Other differences (especially in the case of smartphones) can be attributed to differences in usage between the north and south of the country. The Digital Wallonia agency, for example, reported that only 39% of the Walloon population owns a smartphone. Taking into account these observations, we can conclude that the digiMeter 2015 penetration figures and those of the third wave of the CIM Other Screen Monitor are in fact in alignment.

[15] Centre for Media Information is a central institute which gathers information on the media in Belgium. The CIM is best known as the official and independent source for coverage measurements in Belgium like TV ratings, circulation figures and readership of newspapers and magazines, audience ratings for radio,... The primary goal is to allow advertisers to make informed media plans (which channels are best-suited to reach the target audience). More information on http://www.cim.be/

[16] Source: CIM – "Other Screen Monitor - Wave 3 (N=2.285), Belgian population with access to the internet" (http://bit.ly/CIM_OSM3)

PENETRATION OF MEDIA DEVICES

	CIM OSM 3 - USE	DM 2015 - ADOPTION	DM 2015 - USE
Desktop	46%	51%	49%
Laptop	74%	78%	76%
Tablet	44%	58%	49%
Smartphone	59%	69%	67%

Table 18: Comparison of penetration figures of CIM Other Screen Monitor (use) with digiMeter figures on adoption and use.

The CIM Other Screen Monitor gauges the usage of devices used to consume television content. According to their study, 25% of Belgians (with Internet access) have watched television programs or other videos via desktop computers and 45% via laptops in recent months. digiMeter does not distinguish between those two devices. According to digiMeter, 34% of the Flemings have consumed audiovisual content on a computer in the past month, a figure that lies between the CIM figures for laptops and desktops.

CIM also suggests that 26% of Belgians have viewed video on a tablet, and 29% on a smartphone. In digiMeter, 20% of the Flemish population indicates they have watched video on these devices in the last month. The reason for these lower figures could be twofold. First, there is a difference in timeframe. The CIM Other Screen Monitor looks into the used devices of the 'last few months', while digiMeter only asks about the 'past month'. A second possible explanation is that the CIM Other Screen Monitor survey is entirely filled out by an online panel. These are respondents who not only have an Internet connection, but are also sufficiently familiar with the Internet and use it frequently enough to take part in the study. Those who do have Internet at home but only use it when they need to (functionally), won't feel inclined to take part in a survey. For the digiMeter study on the other hand, seven in ten respondents were recruited offline (at markets, during events, public places,...), thus including people who are less familiar with digital media.

DEVICES USED TO WATCH TELEVISION CONTENT

	CIM OSM 3	DM 2015
Desktop	25%	
Laptop	45%	
Computer		34%
Tablet	26%	20%
Smartphone	29%	20%

Table 19: Have you been watching television content on any of these devices in the last few months (CIM Other Screen Monitor wave 3) / Have you been watching television content on any of these devices in the past month (digiMeter 2015)

Not unexpectedly, video sites like YouTube seem to be the most popular across all devices. For smartphones, we do see that social media videos have become just as popular as videos on video sites. One in three Belgians with an Internet connection indicates that they watch videos on news sites. Belgians are least familiar with television applications such as Yelo TV, TV Overal and Stievie.

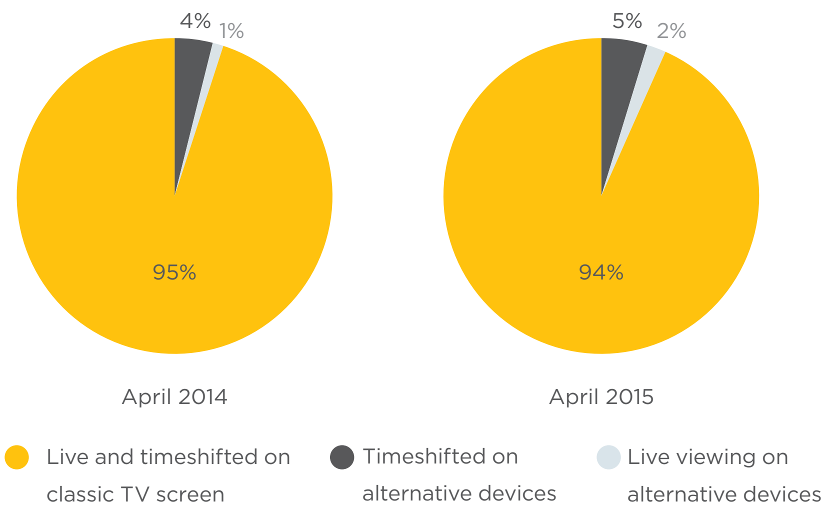
PLATFORMS USED TO WATCH TELEVISION CONTENT

	WEBSITE TV BROAD-CAST	NEWS SITE	VIDEO SITE	TV APP	SOCIAL MEDIA
Desktop	11%	11%	16%	4%	11%
Laptop	20%	21%	31%	9%	22%
Tablet	9%	11%	17%	8%	13%
Smartphone	7%	11%	19%	7%	19%
At least one device	31%	34%	49%	18%	38%

Table 20: Which platforms did you use to watch television content per device? (source: CIM Other Screen Monitor wave 3)

But how does this 'new watching' relate to the traditional television screen? According to the CIM Other Screen Monitor, over 90% of all viewing minutes are still spent watching in the traditional way. The share of the other screens has increased in the past year (from 4,9% in April 2014 to 6,4% in April 2015), but the focus still clearly remains on classic TV viewing.

RATIO OF CLASSIC TV VS. TV CONTENT ON ALTERNATIVE DEVICES



Graph 27: Distribution of total viewing time on classic TV and alternative screens (source: CIM Other Screen Monitor wave 3)

CHAPTER 02

COMPUTER

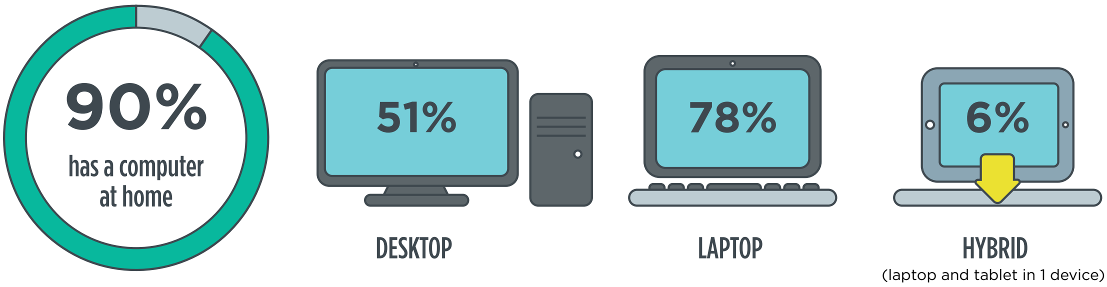
COMPUTER

CHAPTER 02

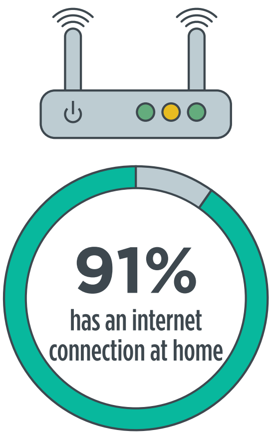
INFOGRAPHIC

COMPUTER:
Music and video streams gaining popularity

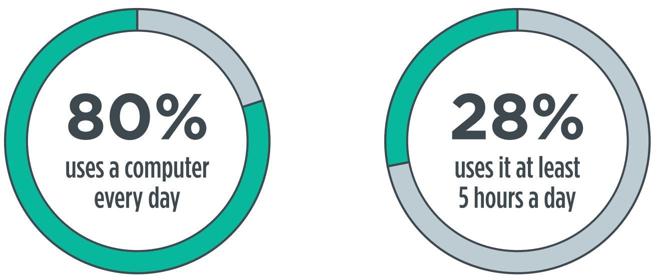
Ownership of computers and internet connections within the households of Flemish people remains stable. The amount of a desktop computer is decreasing, while laptop possession is holding its ground.



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

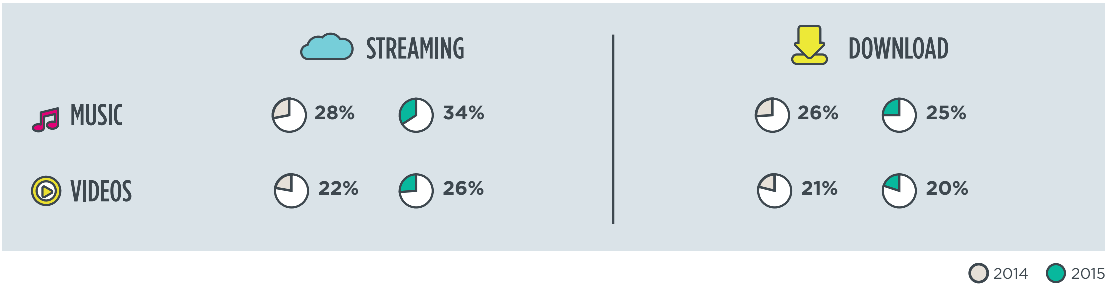


8 out of 10 of the Flemish population use a computer on a daily basis. Almost 3 out of 10 claim to even use a computer at least 5 hours a day.



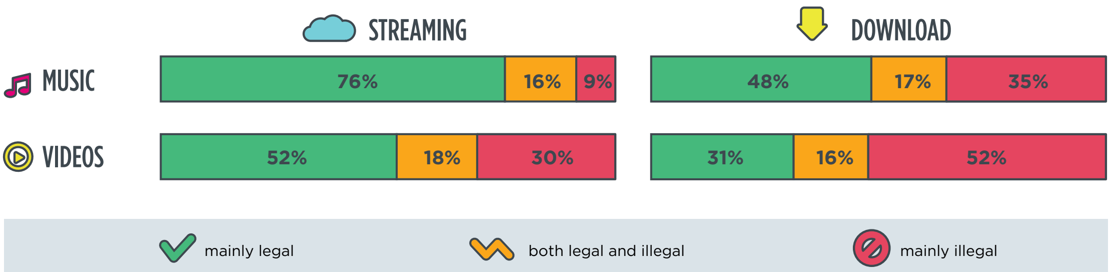
Streaming vs. download

Streaming of content gains popularity, while downloading remains stable.



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

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



GENERAL FACTS & FIGURES
(N=2.181)

90,1%
of the respondents have a computer in their household:

51,1%	78,1%	6,3%	3,9%
Desktop	Laptop	Hybrid*	All three devices

91,2%
of the Flemings have an internet connection in their household (-1,2)[1]

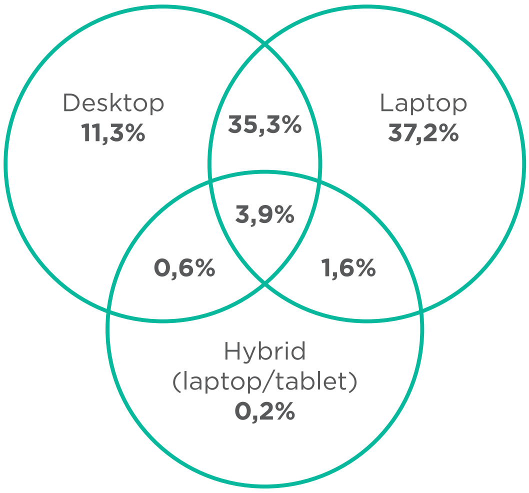
COMPUTER EQUIPMENT

- Laptops continue to be the most popular type of computer in Flanders. The high overlap with desktop computer ownership is striking: half of all laptop owners also have a desktop in their household (39,2% compared with 78,1%).

- The large majority of people with access to a computer in the home, say this is a personal device. For desktops and hybrid devices (laptops from which you can detach the screen and use it as a tablet) the proportion of people who received a device from an employers is almost zero. For laptops, 13,6% of all Flemish people say they have received a device from an employer (almost half of them, or 7,3% within 13,6%, also have a laptop which they purchased themselves).

DESKTOP VS. LAPTOP VS. HYBRID

Total adoption computers: **90,1%** (-1,9)

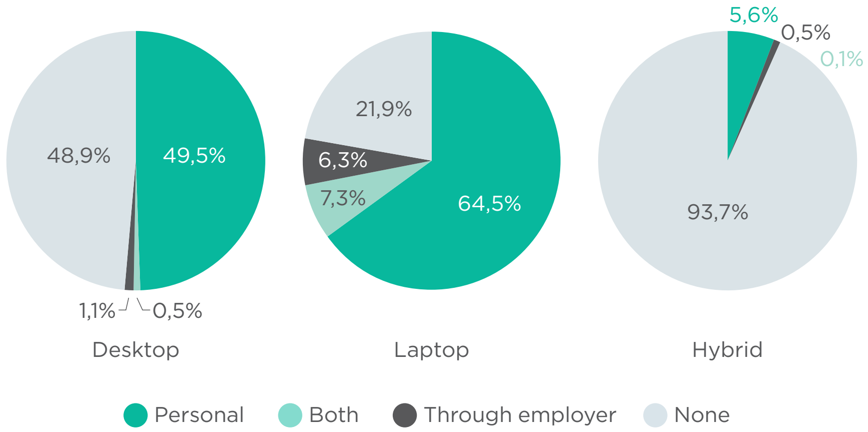


Graph 28: Computer equipment: Desktop vs. Laptop vs. Hybrid (N=2.181)

* Laptop with a detacheble screen that can be used as a tablet

[1] It is worth emphasising here that digiMeter only supplies figures at the individual level, not the household level. So we are not saying that 91,2% of all Flemish households/ families have an internet subscription. However 91,2% of Flemish people have access to the internet within the household. In view of the fact that the adoption of internet connections is highest in larger households (families with at least three members), it is logical that the figure is higher for individuals than households. For a more in-depth analysis, please refer to "Framing the data" in the Computer chapter of last year's report, digiMeter 2014, on page 70. This report can be requested at http://bit.ly/dM_2014.

PERSONAL OWNERSHIP VS. THROUGH EMPLOYER

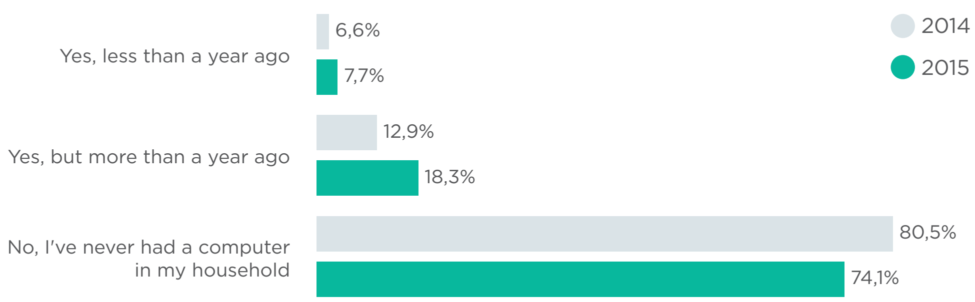


Graph 29: Computer equipment: personal ownership vs. through employer (N=2.181)

NOT HAVING A COMPUTER AT HOME

- Most people who don't have computers in their household at the moment, never had a computer at all (74,1%).

DID YOU USED TO HAVE A COMPUTER IN YOUR HOUSEHOLD?



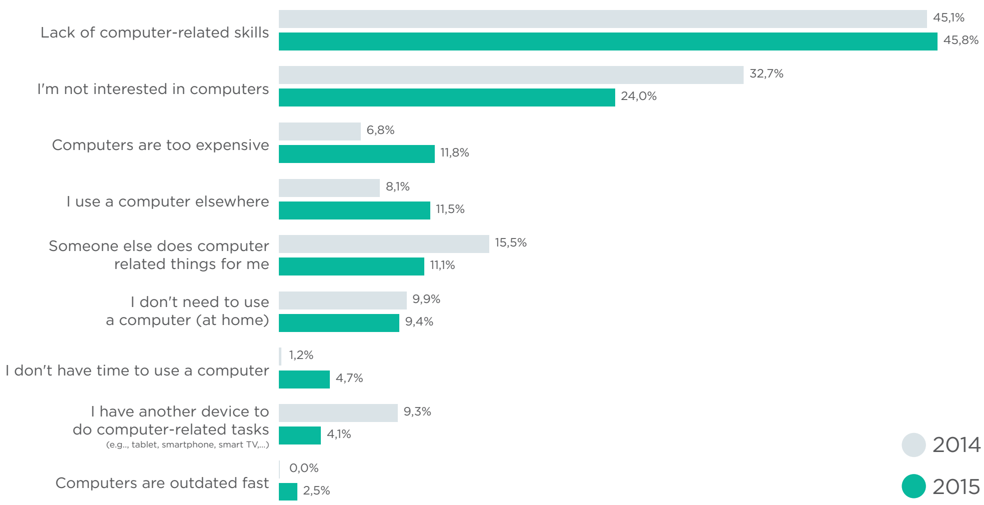
Graph 30: Did you use to have a computer in your household?
(on people who don't own a computer in their household at the moment; 2015: N=216, 2014:N=162)

REASONS FOR NOT HAVING A COMPUTER AT HOME

- Of the 1 in 10 Flemish people who don't have a computer (mainly in the over-65 category), a lack of skills as the main reason for not owning a computer is even more prominent than last year.

- Like last year, the two most important reasons for not having a computer in the household are the lack of computer skills (45,8%), and the lack of interest (24,0%). However, lack of interest has declined as a barrier for computer adoption, as last year 32,7% indicated this to be a major reason for not having a computer at home. Computers being expensive has gained importance as a reason for not having a computer at home: 11,8% (a growth of 5 percentage points compared with last year) indicate the high cost to be a threshold to buy a computer.

REASONS FOR NOT HAVING A COMPUTER AT HOME



Graph 31: 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; 2015: N=216, 2014:N=162)

PROFILING COMPUTER ADOPTERS (N=1.966)

Computers are widely adopted, but the over-65s are considerably less likely to have a computer at home (74,3%). The level of adoption of computers is also lower among people who have had no more than a primary school education (70,9%) or a lower secondary school education (83,4%).

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION[2]
Gender			
Men	93,1%	50,7%	**103**
Women	87,2%	49,3%	**97**
Age			
15-19	99,9%	7,3%	**111**
20-29	98,0%	15,5%	**108**
30-39	94,5%	15,7%	**105**
40-49	95,8%	17,8%	**106**
50-59	90,8%	17,4%	**101**
60-64	91,9%	7,3%	**101**
65+	74,3%	18,9%	**83**
Degree			
No degree or primary education	70,9%	11,7%	**79**
Lower secondary education	83,4%	18,3%	**93**
Higher secondary education	94,9%	38,1%	**105**
Bachelor degree	98,5%	17,5%	**109**
Master or post-university degree	98,3%	14,4%	**109**
Household situation			
Single without children	79,4%	17,2%	**88**
Single with child(ren)	88,3%	4,7%	**98**
Married/living together without children	87,0%	28,1%	**97**
Married/living together with child(ren)	97,2%	29,8%	**108**
Living with both parents	99,5%	12,7%	**110**
Living with one parent	94,6%	5,8%	**104**
Living with others	78,5%	1,6%	**89**

[2] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 11,7% of computer owners have no more than a primary education. This profile constitutes 14,9% of the population of Flanders aged 15 or more. The result is an index of 79, which indicates that people with no more than a primary education are underrepresented among computer owners.

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION[2]
Household members			
1	78,6%	16,9%	**87**
2	88,1%	34,1%	**98**
3	94,0%	17,9%	**104**
4	97,2%	21,6%	**108**
5	100,0%	6,9%	**111**
6	99,8%	2,1%	**111**
> 6	100,0%	0,5%	**125**
Occupation			
Student	100,0%	15,2%	**111**
Blue-collar worker	92,8%	8,1%	**103**
White-collar worker	96,4%	26,5%	**107**
Public servant/teacher	98,3%	10,5%	**109**
C-level (e.g.., CEO, CFO,...)	100,0%	1,3%	**118**
Self-employed	98,6%	5,0%	**109**
Liberal profession	100,0%	0,3%	**100**
Houseman/-wife	92,2%	2,4%	**100**
Unemployed	84,9%	7,6%	**94**
Retired	75,1%	22,8%	**84**
Other	100,0%	0,3%	**100**
Net income			
< €1.000	39,7%	1,0%	**42**
€1.000 - €1.500	80,5%	8,2%	**89**
€1.501 - €2.000	90,6%	12,5%	**101**
€2.001 - €3.000	97,1%	15,1%	**108**
€3.001 - €4.000	97,2%	17,0%	**108**
€4.001 - €5.000	99,0%	9,2%	**111**
> €5.000	100,0%	5,9%	**111**
Don't know	91,7%	13,0%	**102**
Prefer not to say	82,2%	18,1%	**91**

Table 21: Profiling of computer adopters (N=2.181)

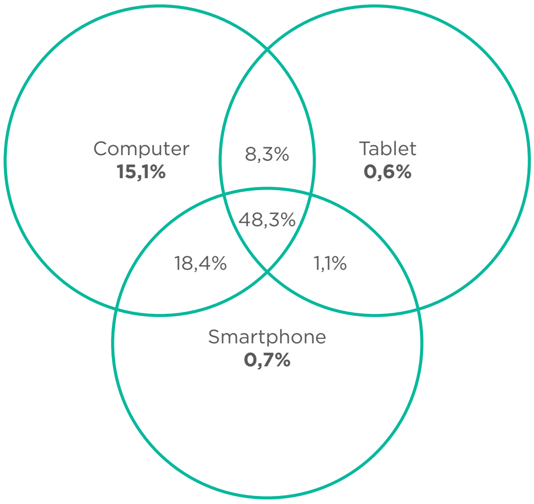
[2] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 11,7% of computer owners have no more than a primary education. This profile constitutes 14,9% of the population of Flanders aged 15 or more. The result is an index of 79, which indicates that people with no more than a primary education are underrepresented among computer owners.

ADOPTION OF COMPUTERS, TABLETS AND SMARTPHONES

- Fewer than 1 in 10 (7,5%) respondents have no computer, tablet or a smartphone. Almost three quarters of the respondents who have no access to any of these devices are at least 65 years old (72,3%).
- It is striking that almost half of the Flemish population have access to a computer, a tablet and a smartphone (48,3%).
- Whereas a computer is the only internet device in the household for 15,1% of Flemish people (especially among the over-60s), we see that only a tiny fraction of people only own a tablet (0,6%) or a smartphone (0,7%). Thus a smartphone or tablet is rarely the only gateway to the internet.
- Almost 1 in 5 respondents say they own both a computer and a smartphone, but no tablet (18,4%).

ADOPTION OF COMPUTERS, TABLETS AND SMARTPHONES

Total adoption computer, tablet or smartphone: **92,5%**



Graph 32: Adoption of computer vs. tablet vs. smartphone (N=2.181).

NO TABLET, COMPUTER, OR SMARTPHONE: RESULTS BY AGE CATEGORY

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	0,0%	0,6%	4,0%	1,7%	15,1%	6,4%	72,3%	**100,0%**
Level of non-adoption by age	0,0%	0,3%	2,0%	0,7%	6,5%	6,7%	23,6%	**7,5%**

Table 22: Breakdown by age for not having access to a computer nor a tablet nor a smartphone (N=2.181)

ACCESS TO A COMPUTER, BUT NOT TO A TABLET OR SMARTPHONE: BREAKDOWN BY AGE

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	0,4%	4,9%	5,9%	8,3%	18,0%	11,3%	51,2%	**100,0%**
Breakdown by age	0,8%	5,2%	5,9%	7,5%	15,8%	23,8%	33,8%	**15,1%**

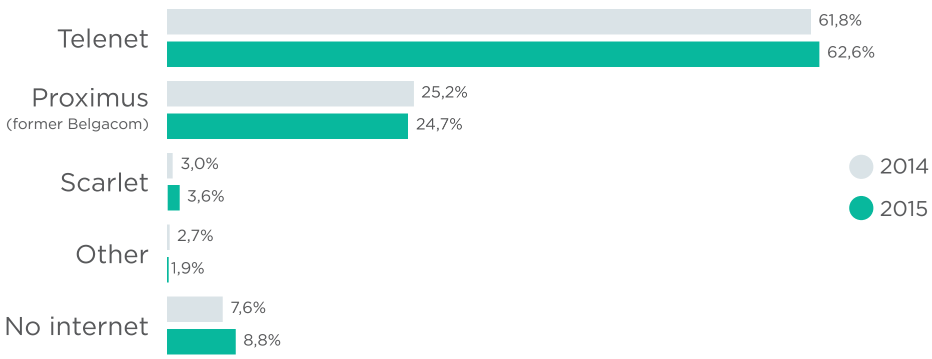
Table 23: Breakdown by age for having access to a computer, but not to a tablet nor a smartphone (N=2.181)

INTERNET

INTERNET-PROVIDER IN THE HOUSEHOLD

91,2% have internet connections in their households (-1,2). Most of the internet connections are provided by Telenet (62,6%) and Proximus (24,7%).

WHAT INTERNET PROVIDER DO YOU HAVE IN YOUR HOUSEHOLD?



Graph 23: Provider of internet connection in your household (2015: N=2.181, 2014:N=2.028)

COMPUTER

COMPUTER AND INTERNET POSSESSION AT HOME

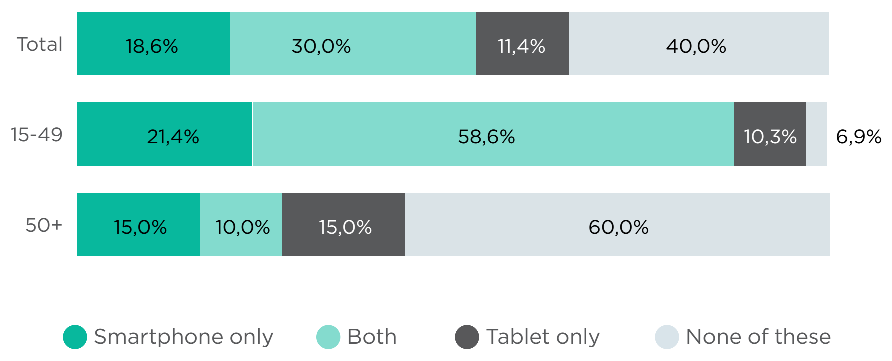
- 2,1% have a computer at home but no internet connection.
- Conversely, 3,2% report having an internet connection but no computer at home.
- Four out of ten Flemish people with an internet connection but without a computer also say that they have neither a smartphone nor a tablet. Three out of ten respondents, however, say they have access to both devices. There are striking age differences, however. In 93,1% of cases, people younger than 50 with an internet connection but no computer do have a smartphone and/or tablet. Among the over-50s, this is only the case for 4 out of 10 respondents.

COMPUTER AND INTERNET POSSESSION AT HOME

	INTERNET AT HOME	NO INTERNET AT HOME
Computer at home	88,0%	2,1%
No computer at home	3,2%	6,7%

Table 24: Computer and internet possession at home (N=2.181)

HAVING AN INTERNET CONNECTION AT HOME, BUT NO COMPUTER: ADOPTION OF OTHER INTERNET DEVICES



Graph 24: Adoption of tablet and smartphone, on people having an internet connection at home, but no computer (N=70)

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 (79,8%).

NOT HAVING INTERNET AT HOME

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

	2015	2014
Yes	20,2%	19,0%
No	79,8%	81,0%

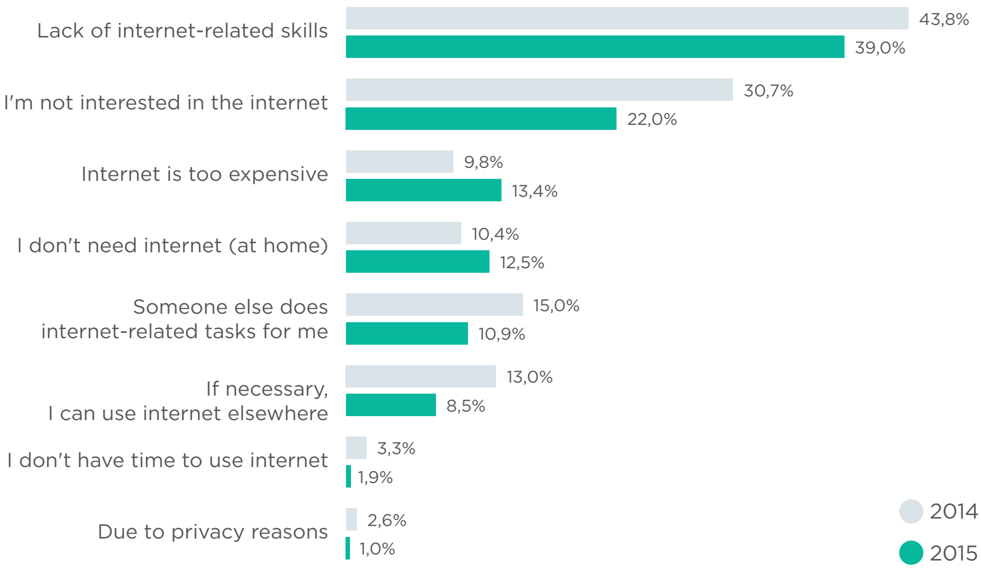
Table 25: Did you use to have an internet connection in your household?
(on people not having internet in their household at the moment; 2015: N=192, 2014: N=153)

REASONS FOR NOT HAVING INTERNET AT HOME

The most important reasons for not having internet connections at home, are lack of internet related skills (39,0%), or interest in the internet (22,0%). As with computer adoption, lack of interest has declined in importance, as last year 30,7% indicated lack of interest as a major reason for not having an internet connection at home. Privacy issues (1,0%) and lack of time (1,9%) are less important reasons for not having an internet connection. For 13,4%, cost is considered to be a significant barrier, compared to 9,8% in 2014.

COMPUTER

REASONS FOR NOT HAVING INTERNET AT HOME



Graph 25: 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; 2015: N=192, 2014: N=153)

PROFILING INTERNET ADOPTERS (N=1.989)

The internet has also been widely adopted. And yet adoption is still somewhat lower among the over-65s (77,8%) and among those who have no more than a primary school education (76,5%). One-person households (81,7%) and two-person households (89,5%) also have lower internet adoption. Finally, there is a correlation with household income. People with the lowest incomes also have the lowest level of internet adoption.

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION[3]
Gender			
Men	92,6%	49,8%	**102**
Women	89,8%	50,2%	**98**
Age			
15-19	96,3%	6,9%	**105**
20-29	96,2%	15,1%	**106**
30-39	96,5%	15,9%	**106**
40-49	96,8%	17,8%	**106**
50-59	91,9%	17,4%	**101**
60-64	93,3%	7,4%	**103**
65+	77,8%	19,6%	**86**
Degree			
No degree or primary education	76,5%	12,5%	**84**
Lower secondary education	85,8%	18,6%	**94**
Higher secondary education	95,3%	37,9%	**105**
Bachelor degree	96,5%	17,0%	**106**
Master or post-university degree	97,9%	14,1%	**107**
Household situation			
Single without children	82,4%	17,7%	**90**
Single with child(ren)	92,0%	4,9%	**102**
Married/living together without children	88,7%	28,3%	**97**
Married/living together with child(ren)	97,1%	29,5%	**106**
Living with both parents	96,8%	12,2%	**106**
Living with one parent	96,1%	5,9%	**105**
Living with others	83,2%	1,6%	**89**

[3] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 19,6% of people who have an internet connection at home are at least 65 years of age. This profile constitutes 22,9% of the population of Flanders aged 15 or more. The result is an index of 86, which indicates that the over-65s are underrepresented among owners of an internet connection.

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION[3]
Household members			
1	81,7%	17,4%	**90**
2	89,5%	34,2%	**98**
3	97,2%	18,3%	**106**
4	96,2%	21,1%	**106**
5	95,3%	6,5%	**105**
6	96,4%	2,0%	**105**
> 6	100,0%	0,5%	**125**
Occupation			
Student	97,9%	14,7%	**107**
Blue-collar worker	96,4%	8,3%	**105**
White-collar worker	97,5%	26,5%	**107**
Public servant/teacher	97,0%	10,2%	**106**
C-level (e.g.., CEO, CFO,...)	90,6%	1,1%	**100**
Self-employed	98,8%	5,0%	**109**
Liberal profession	100,0%	0,3%	**100**
Houseman/-wife	91,4%	2,4%	**100**
Unemployed	88,9%	7,9%	**98**
Retired	77,8%	23,3%	**85**
Other	100,0%	0,3%	**100**
Net income			
< €1.000	56,8%	1,5%	**63**
€1.000 - €1.500	82,3%	8,3%	**90**
€1.501 - €2.000	91,1%	12,4%	**100**
€2.001 - €3.000	97,5%	15,0%	**107**
€3.001 - €4.000	98,0%	16,9%	**107**
€4.001 - €5.000	98,9%	9,0%	**108**
> €5.000	97,4%	5,7%	**108**
Don't know	91,3%	12,8%	**100**
Prefer not to say	84,7%	18,5%	**93**

Table 26: Profiling of internet adopters (N=2.181)

COMPUTER

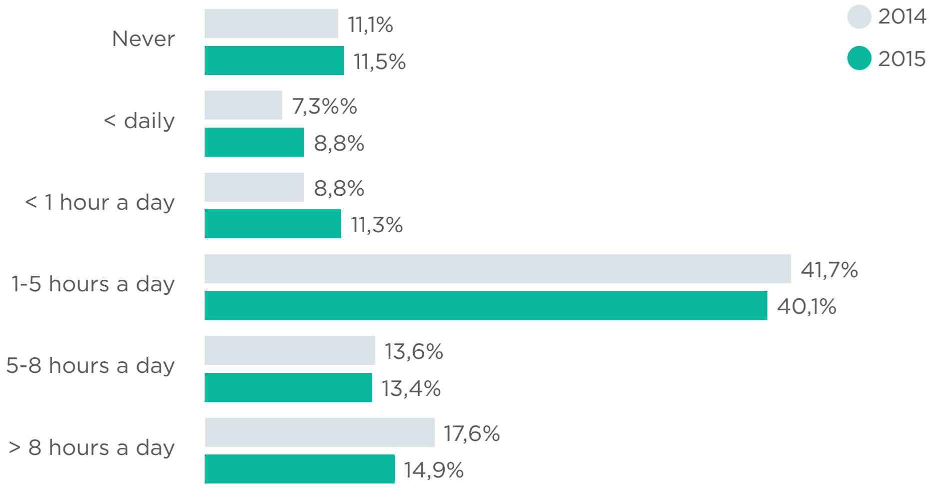
[3] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 19,6% of people who have an internet connection at home are at least 65 years of age. This profile constitutes 22,9% of the population of Flanders aged 15 or more. The result is an index of 86, which indicates that the over-65s are underrepresented among owners of an internet connection.

COMPUTER USE

FREQUENCY OF USING A COMPUTER

Most people use a computer on average 1-5 hours a day (40,1%). Almost three in ten (28,3%) use a computer more than 5 hours a day.

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



Graph 26: Frequency of using a desktop and/or laptop, at home or somewhere else (2015: N=2.181, 2014: N=2.028)

INTERNET ACTIVITIES OF COMPUTER USERS

- The most common daily internet activities on a computer remain reading (77,1%) and sending (65,8%) e-mail, browsing information (68,0%), social networking (55,0%) and news consumption (50,2%).

- Three out of four computer users (74,5%) have already engaged in e-commerce (either selling or buying online), but this is done on a monthly basis (41,9%), rather than as a daily routine (1,9%).

- Apart from functional activities (looking up information, e-mailing), the engagement in social media sites (55,0%) and news sites (50,2%) has become a daily computer routine.

- Aside from the daily computer habits, the rise of streaming is striking. As far as music is concerned, half of all Flemish computer owners (51,0%) have already streamed music and a third of all Flemish people (33,5%) say they do this on a monthly basis. These are increases of 5,0 and 5,5 percentage points compared with 2014. The streaming of films and series has increased by 4,4 percentage points to a quarter of all Flemish people (25,9%) who do this regularly (at least monthly). This increase is largely due to Netflix.

INTERNET ACTIVITIES OF COMPUTER USERS

	EVER	MONTHLY	DAILY	EVOLUTION DAILY 2015-2014
Reading e-mail	96,3%	91,7%	77,1%	**-0,5**
Searching for information (e.g., through Google, Bing,...)	97,0%	91,9%	68,0%	**-2,8**
Sending/replying to e-mail	95,1%	88,8%	65,8%	**N/A**
Social Media	79,4%	71,6%	55,0%	**+2,9**
Visiting news sites	84,8%	75,1%	50,2%	**+1,7**
Office applications (e.g., Word, Excel,...)	83,9%	67,9%	36,8%	**+1,6**
Chatting	65,2%	46,3%	26,0%	**+4,3**
Games	57,0%	35,6%	17,5%	**+3,9**
Streaming music	51,0%	33,5%	10,2%	**+0,2**
Internet calling	60,8%	31,0%	7,9%	**+3,8**
Online banking	83,4%	74,4%	7,6%	**-0,3**
Streaming films and/or series	42,8%	25,9%	7,0%	**+2,5**
Listening live to a radio channel	56,2%	24,8%	5,8%	**-1,7**
Watching TV programmes live	44,9%	16,5%	4,1%	**-0,6**
Downloading films and/or series	37,6%	19,8%	4,0%	**-0,6**
Downloading music	50,4%	24,7%	3,2%	**-0,9**
Selling and/or buying goods	74,5%	41,9%	1,9%	**+0,4**
Radio podcast	30,6%	6,9%	0,5%	**-0,2**

Table 18: Frequency of internet activities on a computer (on people using a computer, 2015: N=1.931, 2014: N=1.875)

COMPUTER

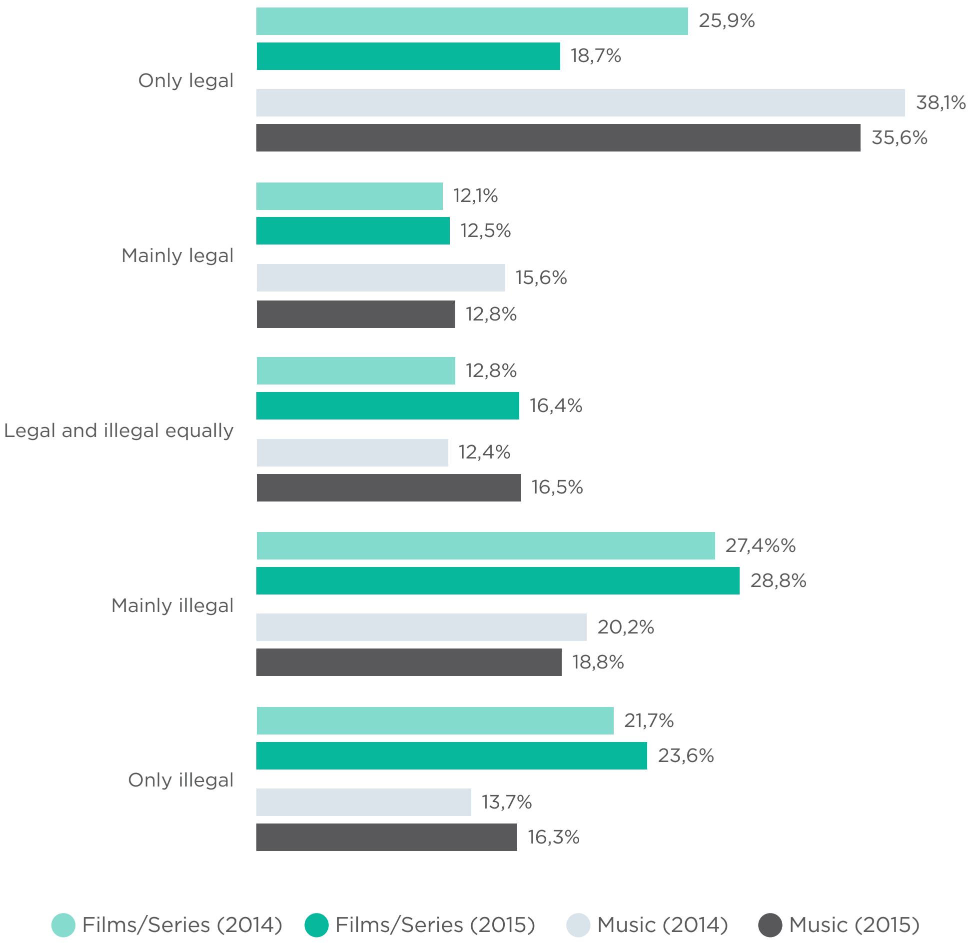
DOWNLOADING AND STREAMING: LEGAL VERSUS ILLEGAL[4]

- As was the case last year, music is legally downloaded more frequently than films or series. 48,4% of respondents who have already downloaded music say that they mainly or exclusively download music legally (a drop of 1,9 percentage points compared with last year), while the figure for films and series is only 31,3% (-5,3). It is striking that the share of respondents that indicate that they mainly or exclusively download music legally has fallen compared with last year, both for music and films and series. We would like to stress that we are not making any statements about the number of downloads here. A possible explanation for this is that people are downloading fewer films/series and less music. However, they are streaming more audio-visual content (e.g., through Netflix). If something is indeed downloaded, this is often done illegally because there is no (legal) stream available. But this cannot be confirmed based on the digiMeter data.

- For streams, we also see that music is streamed legally (75,7%) more frequently than films or series (51,9%). It is striking that the share that mainly or exclusively streams music and audio-visual content legally is higher than the share of respondents who mainly or exclusively download this content legally. Unfortunately we cannot show any development in streaming habits as this is the first year that we have distinguished between streaming and downloading content.

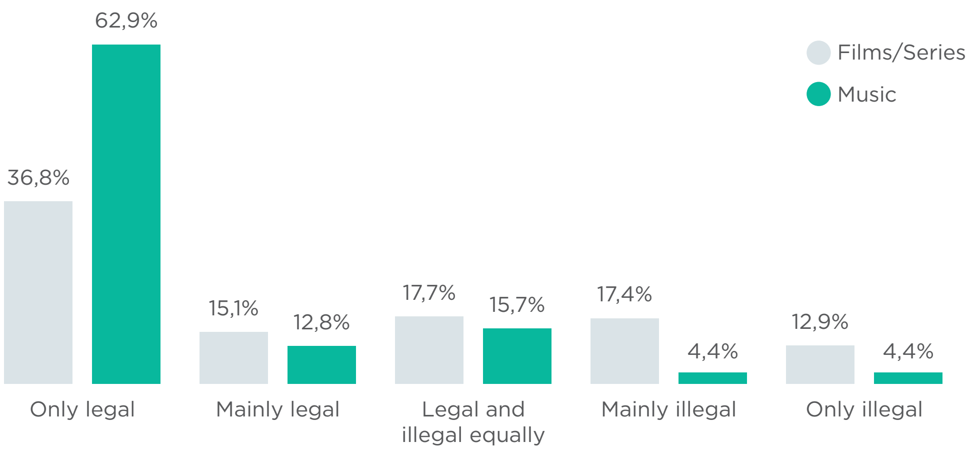
[4] In ensuring accuracy and keeping the threshold of admitting the downloading of illegal content as low as possible, we have explicitly stated in the questions that all data are analysed anonymously. However, we can only report what respondents believe to be legal or illegal sources to download content,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

LEGAL VS. ILLEGAL DOWNLOADING



Graph 37: Illegal versus legal downloading series/movies (on people ever downloading movies/series; 2015: N=726, 2014: N=725) and music (on people ever downloading music; 2015: N=973, 2014: N=942)

LEGAL VS. ILLEGAL STREAMING



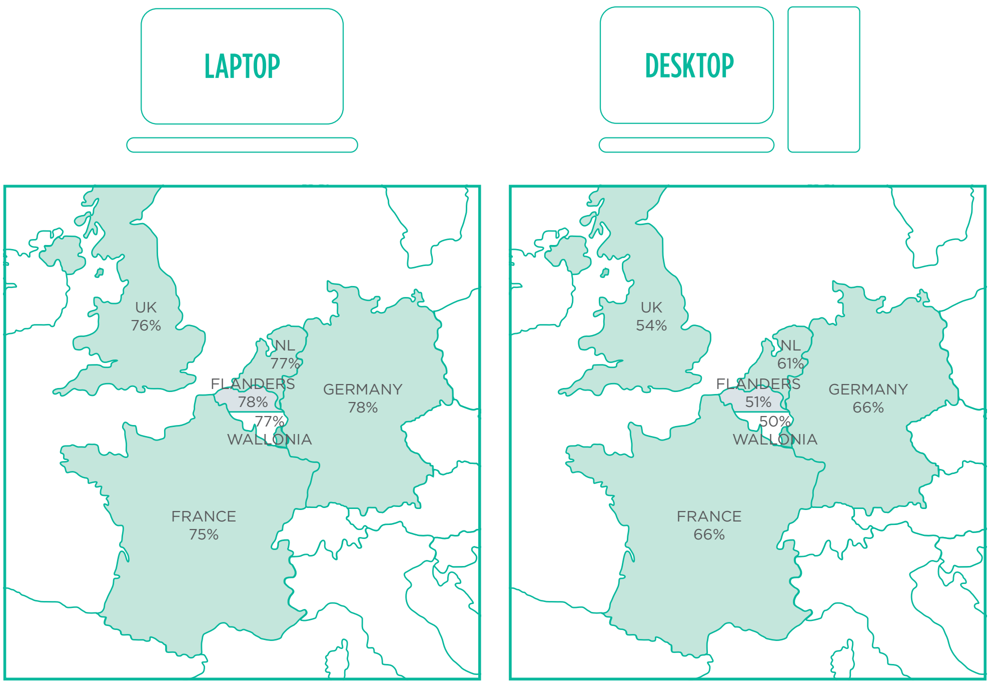
Graph 38: Illegal versus legal streaming series/movies
(on people ever streaming movies/series; N=827) and music (on people ever streaming music; N=984)

COMPUTER

FRAMING THE DATA

Computer ownership (desktop or laptop) is stagnating in Flanders. There is a status quo for laptops at 78% and a slight drop for desktops to 51%, which puts Flanders at the same level as the surrounding regions and countries. When it comes to laptop ownership, there are barely any differences, ranging from 75% in France to 78% in Germany and Flanders. Adoption of the desktop computer is significantly lower throughout but does show more differences from region to region. Wallonia (50%) and Flanders (51%) have the lowest adoption rates for desktop computers. In the UK, 54% have a desktop at home. Adoption is at 61% in the Netherlands, and at 66% in both France and Germany.

ADOPTION OF LAPTOP AND DESKTOP COMPUTERS IN FLANDERS AND NEIGHBORING REGIONS.



Graph 39: Source UK, France and Germany: Ofcom – "International Communications Market Report 2014" (http://bit.ly/Ofcom_ICMR2014)
Source the Netherlands: GfK – "Trends in Digitale Media" (http://bit.ly/GfK_NL_TrendsDigMed)
Source Wallonia: FPS Economy – Statistics and figures – "ICT-indicatoren bij huishoudens en individuen" (http://bit.ly/FPSecon_ITHH)

When we take a look at sales figures, we see similar signs of stagnation.[1] In 2014, 133,8 million desktops were shipped. In 2015, this number fell by 6,2% to 125,5 million units. Laptop shipments fell 3,9% (from 174,3 million in 2014 to 167,5 million in 2015). The total computer market dropped 4,9%. When we include smartphones and tablets into the equation, we see that computers made up 16,8% of all shipped devices in 2014, which lowered to 15,1% in 2015. This decline can be attributed entirely to rising smartphone sales. In 2015, over 1,4 billion smartphones were shipped, compared to 1,3 billion in 2014: an increase of 10,5%. In 2014, 70,7% of all shipped devices were smartphones, compared to 74,0% in 2015. The tablet market on the other hand fell 7,7% (from 229,7 million units in 2014 to 212,0 million units in 2015).

WORLDWIDE SHIPMENTS OF DESKTOP AND LAPTOP COMPUTERS

– IN MILLIONS

	2014 (MILLIONS)	2014 (SHARE %)	2015 (MILLIONS)	2015 (SHARE %)	EVOLUTION
Desktop	133,8	7,3%	125,5	6,5%	-6,2%
Laptop	174,3	9,5%	167,5	8,6%	-3,9%
Total computer	**308,1**	**16,8%**	**293,1**	**15,1%**	**-4,9%**
Smartphone	1.300,4	70,7%	1.436,5	74,0%	+10,5%
Tablet	229,7	12,5%	212,0	10,9%	-7,7%
TOTAL	**1.838,2**	**100,0%**	**1.941,6**	**100,0%**	**+5,6%**

Table 28: Worldwide shipments of desktop and laptop computers (figures in millions). Source: IDC

[1] Source: IDC – Various reports (http://bit.ly/IDC_PCshipments, http://bit.ly/IDC_ConnDev, http://bit.ly/IDC_TabletShipments, http://bit.ly/IDC_SmartphoneShipments)

STREAMING

Content streaming is on the rise. In Flanders, 34% of computer owners indicate that they stream music on their computers every month (+5,5 percentage points compared to last year), while 26% stream films and series (+4,4 percentage points compared to last year). The latter increase can largely be attributed to the success of Netflix and YouTube. In the US, Netflix accounts for 36,5% of all bandwidth use.[2] YouTube comes in second at 16,5%, followed at a considerable distance by web surfing (6,0%), Facebook (2,7%), Amazon Instant Video (2,0%) and Hulu (1,9%).

YouTube is celebrating its 10th year. Its impact as a streaming service cannot be underestimated. The Telegraph listed a number of domains that have changed dramatically since the advent of YouTube[3]. The first domain is politics. Politicians and other policymakers are now able to broadcast their vision and campaign directly to the public, without the need for journalists. The fact that YouTube videos have become an essential campaigning element was made apparent by the thirty Obama campaign workers who were uniquely responsible for promoting his reelection through YouTube. But the power and influence of YouTube have not just been discovered by those seeking power in legal ways: terrorist organizations have discovered YouTube as well. These also see YouTube as a suitable channel to rapidly distribute videos to a worldwide audience without having to (directly) rely on journalists. As Middle East reporter Jeffrey Goldberg put it: “They don’t need a middleman anymore. Journalists have been replaced by YouTube”.

A second domain is the way in which celebrities emerge. YouTube has become an important channel through which to share talent with the world and get noticed. Justin Bieber has been one of the first megastars to owe his success to YouTube. The biggest change however, has been the advent of many new genres of celebrity. One noteworthy and characteristic example is the success of DC Toys Collector[4], a woman who earned 5 million dollar in 2014 by posting videos in which she unwraps and assembles toys from surprise eggs. While the idea in itself seems absurd and could never have caught on via traditional television, it is a massive hit on YouTube. The most successful YouTuber of the past few years however, is probably PewDiePie. With 40,5 million subscribers, he’s leaving ‘classic’ celebrities like Taylor Swift (1,3 million subscribers), Rihanna (1,4 million subscribers) and Beyoncé (1,9 million subscribers) far behind. The only thing he needs to do is to post videos of himself playing games and sharing his experience in a captivating way. Fashion and lifestyle is another trending topic on YouTube. A couple of young fashion vloggers like Yuya (12,2 million subscribers) and Zoella (9,5 million subscribers) have become so influential that they are very sought after by well-known fashion and beauty brands to showcase products in their videos.

[2] Source: Variety – “Netflix Bandwidth Usage Climbs to Nearly 37% of Internet Traffic at Peak Hours” (http://bit.ly/VAR_USAbandwidth)

[3] Source: The Telegraph – “How YouTube changed the world” (http://bit.ly/TLGPH_YouTube)

[4] Source: Daily Mail – “The mystery woman who makes $5million from YouTube but you’ll never see her face: Anonymous video star makes a fortune with bizarre videos OPENING PRESENTS” (http://bit.ly/Daily_DCtoys)

YouTube is also the place to find alternative manuals, instructional videos, reviews, tips & tricks, ... There is hardly a product or action out there that hasn't a whole series of YouTube videos showing how to handle it. Whether it's about the newest iPhone, installing a boiler, playing guitar, knitting or everyday things like making your bed, YouTube is bound to have an instructional video for it. So-called life hackers are popular on YouTube as well. These teach you how to use everyday objects for more ingenious applications, with a special niche - called Ikea Hacks - that uses Ikea components to build something entirely different.

A final domain is advertising. One advertising phenomenon is the sponsoring of successful YouTubers. As mentioned above, influential fashion vloggers often receive incentives of fashion and beauty brands to showcase products in their videos. Some advertisement videos in itself, however, have also been watched and shared eagerly on YouTube. One of the most successful examples is the Evian series starring babies. The video commercial 'Baby&me' has been viewed over 115 million times[5]. The Belgian commercial 'Push to add drama'[6], a concept by Duval Guillaume commissioned by TNT, went viral as well. Since its launch in 2012, the video has been watched over 53 million times and has received lots of international praise[7]. Remarkably, four in ten of the best-viewed videos in 2014 were commercials. This does not mean that YouTube users are big fans of advertising, but merely points out that brands can use YouTube as an incredibly powerful channel if they find the right angle and bring great content. Whether the origin of the video is commercial or not, if the content is striking, funny or touching enough... there is real chance the video will get noticed in a big way.

MOTIVATIONS FOR DOWNLOADING (IL)LEGALLY

Over half of Flemish respondents who have streamed music before, indicate they mainly do so in a legal way (51,9%). For movies and series, three out of four (75,7%) usually stream legally. On the short term this does, however, not seem to impact the number of people who mainly download illegally: their number has slightly increased in comparison to 2014. What are their underlying motivations to continue to do so, and what measures could provide a solution?

British research[8] shows that the free availability of content in itself is the greatest motivation to download content illegally (49%): "if it is available for free, why should I pay?" The fact that this is often easy (43%) and quick (37%) to do provides further motivation.

[5] Source: YouTube (http://bit.ly/YouTube_Evian)

[6] Source: YouTube (http://bit.ly/YouTube_AddDrama)

[7] Source: Business Insider – "How TNT Made The Biggest Viral Video Ad Of The Year—In Belgium" (http://bit.ly/BusIn_AddDrama)

[8] Source: Intellectual Property Office, UK – "Online Copyright Infringement Tracker. Wave 5 (covering period Mar 15 – May 15)" (http://bit.ly/IPO_OCIT5)

MOTIVATIONS FOR ILLEGALLY DOWNLOADING CONTENT

It's Free	49%
It's easy/convenient	43%
It's quick	37%
It means i can try something before i buy it	17%
Because i can	16%
I can't afford to pay	14%
I think legal content is too expensive	13%
I already owned content in another format	9%
The Industry Makes Too Much Money	9%
It's what my friends or family do	9%
The files i want are not available on legal services	8%
I've already paid to see it/them at the cinema/in concert, etc	7%
I don't want to wait for content to become available on legal services	7%
I already spend enough on content	5%
I don't think i should have to pay for files online?	5%
No one suffers	4%
I think legal content is too poor quality	2%
No one ever gets caught	2%

Table 29: Motivations for illegal consumption of content online (source: Intellectual Property Office, UK)

When asked what needs to change to decrease the use of illegal sources of content, we can distinguish three aspects. The first is the price: if legal content would be cheaper, the need to download illegally would decrease. A second aspect is availability: if all desired content would be obtainable in a legal way and available as soon as it was released, illegal downloading would decrease. A final aspect concerns the penalties: if the legality of sources would be more visible, notifications would be sent when illegal content was consumed on the device or via the Internet connection at home, real sanctions would be imposed (e.g. stopping or reducing Internet speed), and there would be a real risk of being caught, illegal downloading would decrease.

ASPECTS THAT WOULD ENCOURAGE STOPPING ACCESSING CONTENT ILLEGALLY ONLINE

If legal services were cheaper	25%
If everything I wanted was available legally	21%
If it is clearer what is legal and what isn't	21%
If everything wanted was available legally online as soon as released elsewhere	16%
If I thought I might be sued	15%
If I thought I might be caught	15%
If my ISP sent me a letter saying they would suspend my internet access	15%
If a subscription service I was interested in became available	13%
If legal services were better	12%
If everyone else stopped doing it	11%
If friends or family were caught	11%
If my ISP sent me a letter informing me my account had been used to infringe	11%
If legal services were more convenient/flexible	10%
If I knew where to go to see if something was illegal or not	10%
If my ISP sent me a letter saying they would restrict my internet speed	10%
Nothing would make me stop	10%
If there were articles in the media about people being caught	6%

Table 30: Aspects that would encourage stopping accessing content illegally online (source: Intellectual Property Office, UK)

Those who do use legal (paid) sources to consume content, indicate that ease of use and moral considerations are important. Implicitly, it seems that illegal consumption often takes place without thinking about it ("it's free, it's readily available and I have no explicit indication that it is illegal or that I'm harming someone, so why not?"), while subscribing to a paid service is an informed choice ("I expected higher quality, high convenience, I want nothing to do with illegal practices and I want to support and reward content creators, so I'm paying for content"). This seems logical, but shows how online media have influenced our thinking about the (free) availability of content. While it was self-evident to pay for traditional media content decades ago ("everyone has a TV subscription, so I'll take one too"), free availability of content is now the norm rather than the exception.

MOTIVATIONS FOR USING PAID SERVICES

It's easier/more convenient	48%
It's quicker	44%
I don't want to use illegal sites	37%
I want to support creators/industry	24%
I think it's morally wrong to use illegal sites	24%
They are better quality	24%
I fear they may have viruses/ malware/spyware	22%
I can afford to pay	17%
I don't think it is right to get them for free	16%
I prefer to pay	16%
I'm unaware of the free services available	9%
I fear I might be caught	8%
I don't know how to use the free services	6%

Table 31: Motivations for using paid services (source: Intellectual Property Office, UK)

CHAPTER 03

TABLET

TABLET

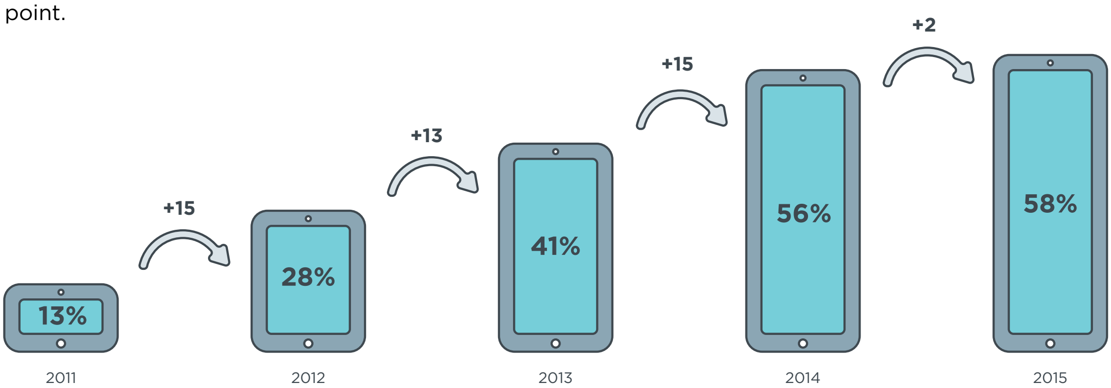
CHAPTER 03

INFOGRAPHIC

TABLET:
Stagnation both in ownership and in use

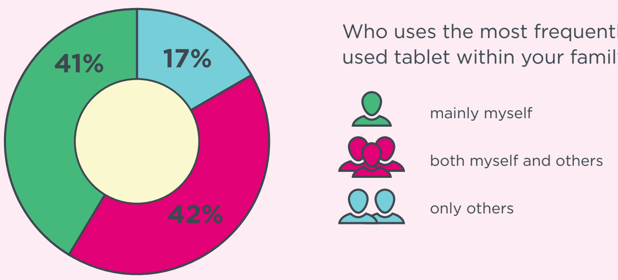
Adoption of tablets in the past 5 years

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

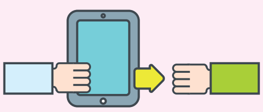


Use of tablets

Who uses the most frequently used tablet within your family?



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



Young families

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

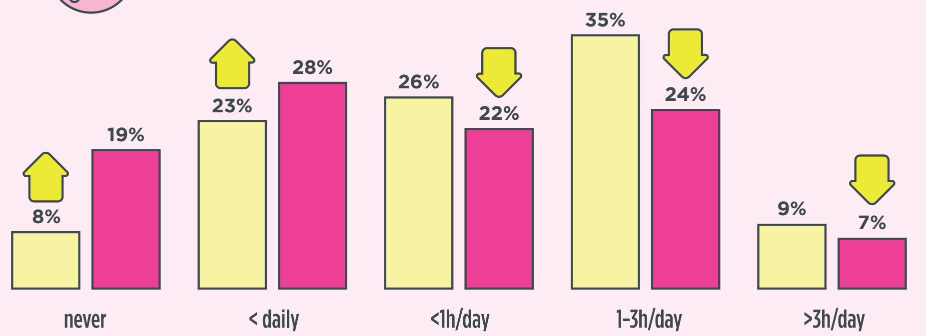
People aged 50+

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

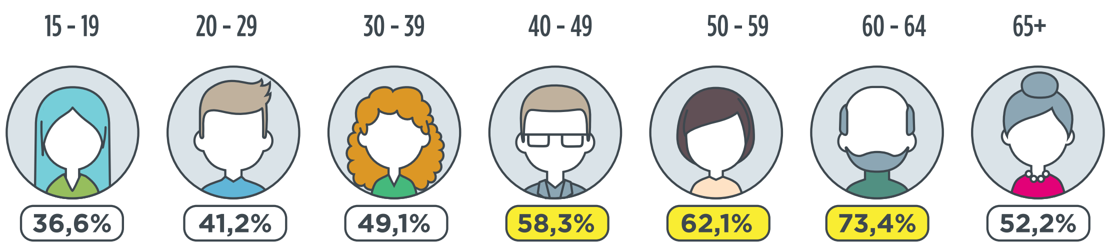
Daily use of tablets

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

Use of tablets on a daily basis has dropped from 69% in 2014 to 53% in 2015



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



GENERAL FACTS & FIGURES (N=2.181)

58,3%

The adoption of tablets seems to have reached a stagnation point. Almost six out of ten Flemish people (58,3%) say they now have access to a tablet in their household. This is an increase of 2,5 percentage points compared with 2014. Last year, this increase amounted to 14,4 percentage points.

50,3%

Half of the most frequently used tablets (50,3%) run on Apple iOS (iPads).

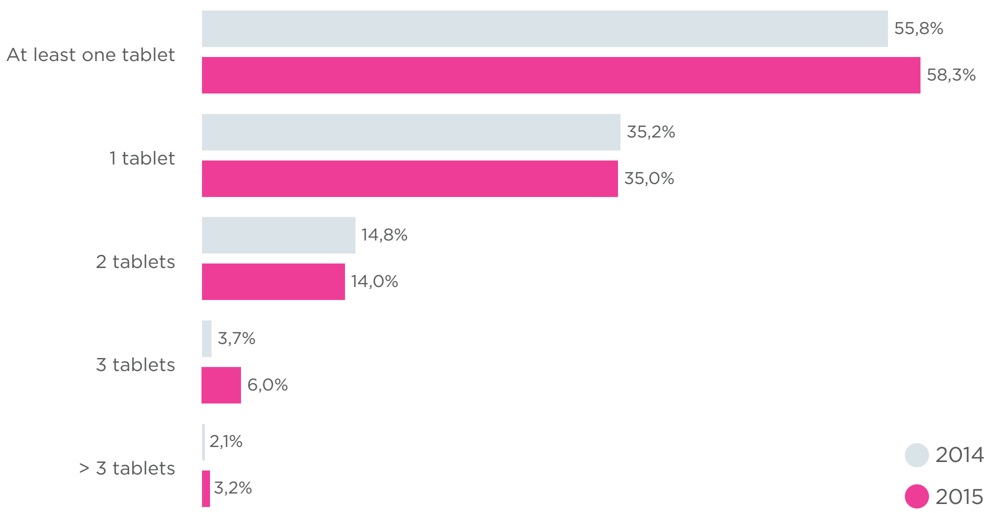
- The greatest increase (+3,3 percentage points) is mainly in households that were already a "tablet household", more specifically in families that already had at least 3 tablets at their disposal (9,2%).
- Owning a tablet does not mean using it: 16,8% of those who have a tablet in the household do not use it themselves. Taking this into account, we can state that 48,5% of the Flemish population are active tablet users. This is a decline of 3,0 percentage points compared to last year.

TABLET

TABLET ADOPTION

TABLET OWNERSHIP IN HOUSEHOLD

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

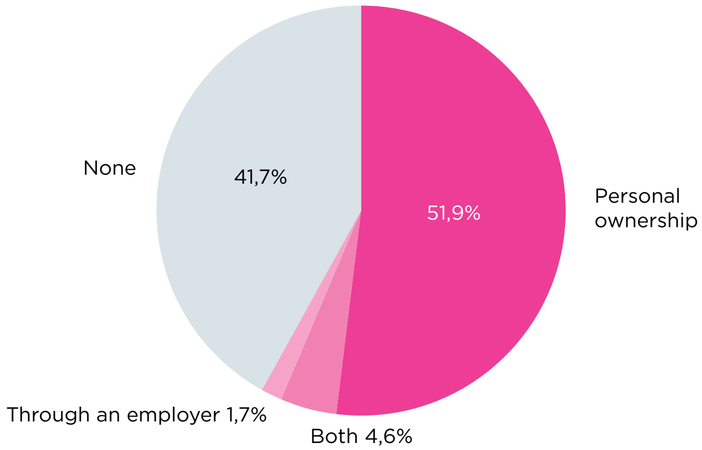


Graph 40: How many tablets do you have access to in your household? (N=2.181)

PERSONAL OWNERSHIP VS. THROUGH EMPLOYER

The lion's share of the tablets within a household were bought by household members. Only a fraction was received from an employer. 51,9% of the respondents say they only own tablets they purchased personally, whereas only 1,7% say they only have a tablet that they received from an employer. Almost 5% (4,6%) say they own (a) personally purchased tablet(s) as well as one or more tablets obtained through an employer.[1]

TABLETS: PERSONALLY PURCHASED OR OBTAINED THROUGH THE EMPLOYER

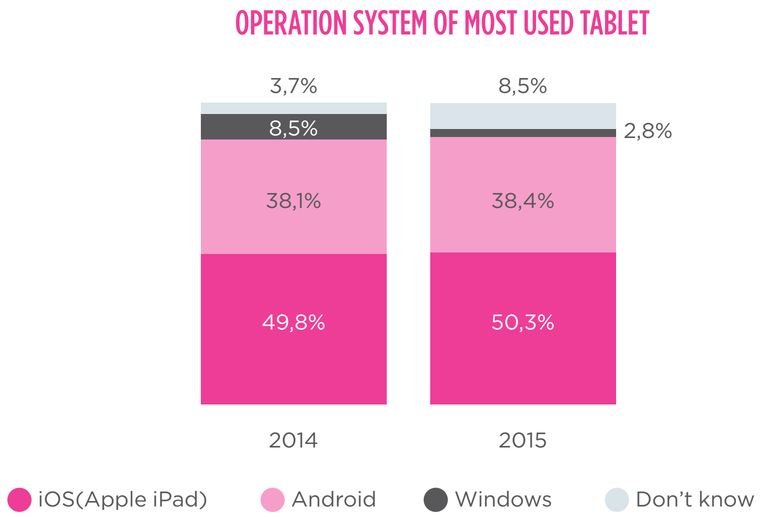


Graph 41: How many tablets in this household were personally purchased?
How many tablets in this household were received from the employer? (N=2.181)

[1] This does not mean that only 6,3% received a tablet from an employer (i.e., the 1,7% that only have a tablet which they received from an employer and the 4,6% with (a) personal tablet(s) and tablet(s) they received from an employer)). We only enquire here into the devices available in a household. Respondents who have received a tablet from work but who may only use it for professional purposes or who must leave the tablet at work (and perhaps share it with colleagues) will answer that the household has no access to a tablet obtained from the employer.

OPERATION SYSTEM OF MOST FREQUENTLY USED TABLET

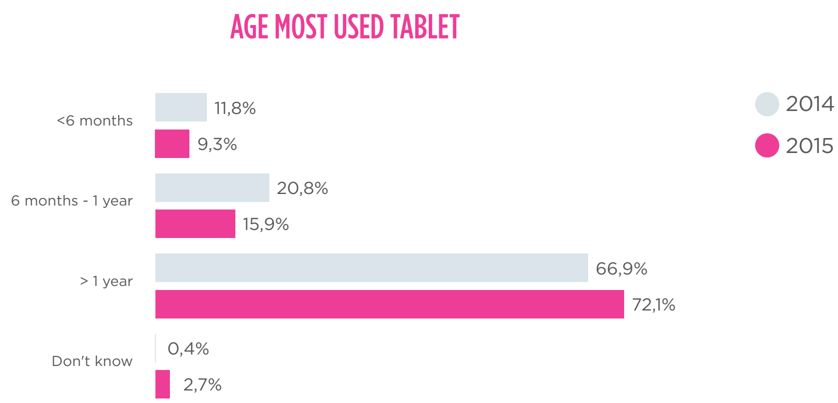
The ratio between iPads and Android tablets has remained stable. The tablet that is used most frequently in half of the cases is an iPad (50,3%, a negligible increase of 0,5 percentage point). In almost 4 out of 10 cases this is an Android tablet (38,4%, an 'increase' of 0,3 percentage points). It is worth noting that the share of tablets with Windows as an operating system has sharply dropped this year (from 8,5% in 2014 to 2,8% this year)[2].



Graph 42: Operation system of most frequently used tablet in household
(on people having access to a tablet in their household; 2015: N=1.271, 2014: N=1.131)

AGE OF THE MOST FREQUENTLY USED TABLET

Almost three quarters of the most frequently used tablets (72,1%) are at least one year old (+5,2%). This is only 62,1% for owners of a mobile phone (smartphone or GSM) (more details in the "Telephony" section).



Graph 43: Age of the most frequently used tablet in household
(on people having access to a tablet in their household; 2015: N=1.271, 2014: N=1.131)

[2] We wish to emphasise here that we are only asking about the operating system of the most frequently used tablet. Thus we cannot exclude the possibility that this drop is mainly due to the fact that people who own a Windows tablet also often own a tablet with another operating system, which they use even more frequently. Moreover the share of respondents who have no idea what operating system their most frequently used tablet runs on has strongly increased (from 3,7% to 8,5%). In view of the fact that the market for operating systems is dominated by the two leaders iOs and Android, Windows is also a substantially less familiar name as an operating system for tablets. This means that respondents with a tablet that has Windows as an operating system may not know exactly which operating system they are using.

PROFILING OF TABLET ADOPTERS (N=2.181)

- Tablet adoption is highest among people under 50, with peaks among 15 to 19-year olds (level of adoption 75,8%, profile index 129) and 40-49-year olds (level of adoption 74,3%, profile index 127). The fact that the two age categories are strongly correlated is not surprising: 15 to 19-year olds often still live with their parents and those parents are often between 40 and 49 years of age. And as we are asking about tablet ownership in the household, it is logical that the two age categories have a similar level of adoption. However there is a difference in use between these two age groups (see below). Among the 40 to 49-year olds that have access to a tablet in the household, 58,3% say they use it themselves on a daily basis, compared with 36,5% in the category of 15 to 19-year olds.

- Tablet adoption is higher among people who had been in higher education, had a higher income, and among larger households (families with children and households with at least three members).

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION[3]
Gender			
Men	61,0%	51,3%	**105**
Women	55,7%	48,7%	**95**
Age			
15-19	75,8%	8,5%	**129**
20-29	68,0%	16,7%	**117**
30-39	66,4%	17,1%	**114**
40-49	74,3%	21,4%	**127**
50-59	62,3%	18,4%	**107**
60-64	52,9%	6,5%	**90**
65+	28,7%	11,3%	**49**
Degree			
No degree or primary education	34,1%	8,7%	**58**
Lower secondary education	51,0%	17,3%	**88**
Higher secondary education	62,0%	38,6%	**107**
Bachelor degree	69,6%	19,1%	**119**
Master or post-university degree	72,2%	16,3%	**123**

[3] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 8,5% of respondents who have a tablet at home are between the ages of 15 and 19 years. This profile makes up 6,6% of the population of Flanders aged 15 or more. The result is an index of 129, which indicates that 15-19-year olds are overrepresented among tablet owners.

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION[3]
Household situation			
Single without children	39,4%	13,2%	**67**
Single with child(ren)	58,5%	4,8%	**100**
Married/living together without children	51,1%	25,5%	**88**
Married/living together with child(ren)	73,6%	34,9%	**126**
Living with both parents	73,3%	14,5%	**126**
Living with one parent	62,1%	5,9%	**105**
Living with others	35,5%	1,1%	**61**
Household members			
1	36,3%	12,1%	**62**
2	51,7%	30,9%	**89**
3	65,8%	19,4%	**113**
4	76,2%	26,2%	**131**
5	80,8%	8,6%	**139**
6	72,8%	2,3%	**121**
> 6	53,4%	0,4%	**100**
Occupation			
Student	72,2%	16,9%	**123**
Blue-collar worker	61,4%	8,3%	**105**
White-collar worker	73,2%	31,1%	**125**
Public servant/teacher	66,3%	10,9%	**114**
C-level (e.g., CEO, CFO,...)	93,7%	1,8%	**164**
Self-employed	58,7%	4,6%	**100**
Liberal profession	61,5%	0,3%	**100**
Houseman/-wife	73,7%	3,0%	**125**
Unemployed	51,8%	7,2%	**89**
Retired	33,2%	15,6%	**57**
Other	41,0%	0,2%	**67**

[3] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 8,5% of respondents who have a tablet at home are between the ages of 15 and 19 years. This profile makes up 6,6% of the population of Flanders aged 15 or more. The result is an index of 129, which indicates that 15-19-year olds are overrepresented among tablet owners.

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION[3]
Net income			
< €1.000	22,5%	0,9%	**38**
€1.000 - €1.500	37,1%	5,8%	**63**
€1.501 - €2.000	44,8%	9,5%	**77**
€2.001 - €3.000	67,2%	16,1%	**115**
€3.001 - €4.000	70,5%	19,1%	**121**
€4.001 - €5.000	74,8%	10,7%	**129**
> €5.000	80,4%	7,3%	**138**
Don't know	62,6%	13,7%	**107**
Prefer not to say	49,1%	16,8%	**84**

Table 32: Profiling of tablet adopters (N=2.181)

INTENTION TO BUY A TABLET IN THE NEXT 12 MONTHS

TABLET

- The intention to buy a tablet in the next 12 months dropped sharply in the past year. Last year, 29,0% indicated that they were considering purchasing a tablet within the year, compared with only 20,6% this year. The sharpest drop is in the category of people who do not yet own a tablet. Last year, 32,4% of this group was still considering purchasing a tablet, compared with only 21,2% this year (a drop of 11,2 percentage points). Those who already have a tablet at their disposal are also less inclined to buy a tablet in the next 12 months (a decline of 6,0 percentage points). This strongly reduced intention to buy supports the hypothesis that the level of adoption is gradually reaching a saturation point.

INTENTION TO BUY A TABLET IN THE NEXT 12 MONTHS

	ALREADY HAS A TABLET		NO TABLET		TOTAL	
	2014	**2015**	**2014**	**2015**	**2014**	**2015**
Yes	7,5%	5,6%	5,9%	5,1%	**6,8%**	**5,4%**
In doubt	18,7%	14,6%	26,5%	16,1%	**22,2%**	**15,2%**
No	73,8%	79,7%	67,6%	78,8%	**71,0%**	**79,3%**

Table 33: Purchase intention to buy a tablet within the following 12 months (2015: N=2.181, 2014: N=2.028)

[3] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 8,5% of respondents who have a tablet at home are between the ages of 15 and 19 years. This profile makes up 6,6% of the population of Flanders aged 15 or more. The result is an index of 129, which indicates that 15-19-year olds are overrepresented among tablet owners.

USE OF TABLET

USING A TABLET

- About 1 in 6 (16,8%) people with access to a tablet in the household say they do not use it themselves. We must clearly distinguish between access to a tablet and effectively using one. In practice, 58,3% of all Flemish people say they have access to a tablet in their household, whereas 48,3% of the Flemish population say they use a tablet themselves. In addition to the 16,8% non-users of tablets, 41,3% say that they use the tablet the most within their household. An equally large share (41,9%) say that they and the other members in the household use the tablet. This contrasts with the smartphone, which usually is considered a more personal device (92,8%, see Telephony section).

- If we divide tablet use by age group, we see that the older segments (50+) mainly state that they are the most frequent (or even the only) user of the tablet. In the under-50s category, respondents indicate more frequently that they share the tablet with others. The highest numbers of people who have access to a tablet but do not use it themselves are in the younger segments (15-29 years). Young people who still live at home in a household with a lot of devices in other words clearly prefer the "laptop + smartphone" combination over a tablet.

- Tablets mainly seem to be used in households with (young) children, where the tablet is easily shared within the household, and also by somewhat older, more highly educated people who consider it their personal device. Moreover, there are also striking differences in terms of usage between these two groups. Among people under 50, respondents tend to make more use of entertainment applications (chatting, taking and sharing photos and videos, consumption of music and audiovisual content). Among the over-50s, respondents tend to prefer more functional applications (e-mail, searching for information, news websites, online banking).

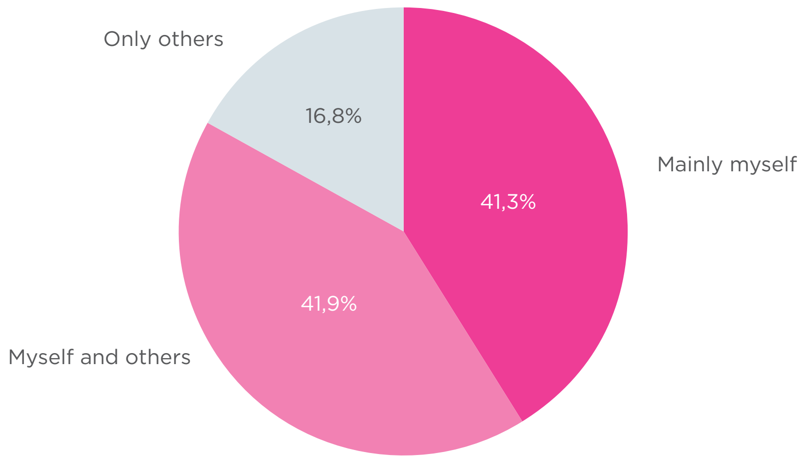
- If they do not use the tablet themselves, it is often used by their children (39,7%) or partner (35,4%).

- The frequency of use of tablets seems to be declining. Last year, 69,4% of people with access to a tablet stated that they used it themselves on a daily basis. This year, only 53,0% asserted this. The share of "heavy users" (more than three hours a day on the tablet) has also dropped slightly by 1,9 percentage points (from 8,7% in 2014 to 6,8% in 2015).

- Tablets are most frequently used on a daily basis by tablet owners between the ages of 40 and 64 years, the group who consider the tablet a more personal device (see above). This age category accounts for 54,2% of daily tablet users. The share of daily tablet users in this segment varies from 58,3% (40-49-year olds) to 73,4% (60-64-year olds).[4]

[4] Younger tablet users thus tend to use their tablet less frequently than the older segments. This does not mean that the tablet is inactive more frequently in these younger segments. As the tablet is shared with other household members in young families, it may have a high frequency of daily use by various members of the family. In view of the fact that digiMeter only makes statements at an individual level, and not at household level, we cannot draw any conclusions on this.

WHO USES THE MOST FREQUENTLY USED TABLET IN YOUR HOUSEHOLD?



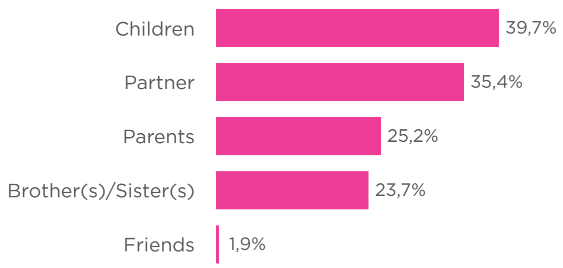
Graph 44: Who uses the most frequently used tablet in your household?
Among people having access to a tablet in their household, N=1.271)

WHO USES THE MOST FREQUENTLY USED TABLET: BREAKDOWN BY AGE

MAINLY MYSELF	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	5,9%	14,9%	14,3%	14,4%	24,5%	8,3%	17,6%	**100,0%**
Level of adoption by age	28,6%	36,9%	34,7%	27,8%	55,0%	52,7%	64,3%	**41,3%**
MYSELF AND OTHERS								
Age profile	9,2%	16,0%	19,4%	29,7%	13,0%	6,3%	6,4%	**100,0%**
Level of adoption by age	45,2%	40,2%	47,5%	58,1%	29,5%	40,3%	23,8%	**41,9%**
ONLY OTHERS								
Age profile	13,3%	22,7%	18,2%	18,0%	17,1%	2,7%	8,0%	**100,0%**
Level of adoption by age	26,2%	22,9%	17,9%	14,1%	15,5%	7,0%	11,8%	**16,8%**

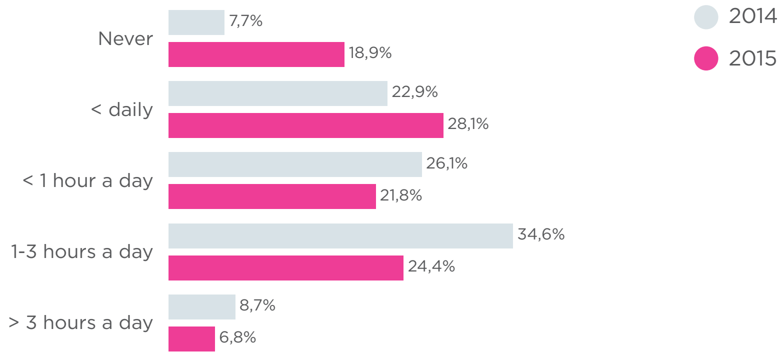
Who in your family uses the most frequently used tablet - Breakdown by age
(on people having access to a tablet in their household, N=1.271)

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



Graph 45: Who is using the tablet if the respondent never uses the tablet?
(on people having access to a tablet in their household, but who state that they never use it themselves, N=213)

FREQUENCY OF USING A TABLET



Graph 46: Frequency of using a tablet (on people having access to a tablet in their household; 2015: N=1.271, 2014: N=1.131)

DAILY USE OF TABLET: BREAKDOWN BY AGE

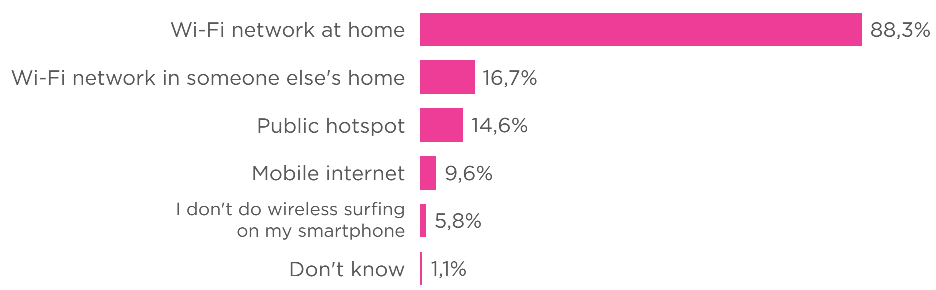
	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	5,9%	12,9%	15,9%	23,5%	21,6%	9,1%	11,1%	**100,0%**
% daily use tablet by age	36,6%	41,2%	49,1%	58,3%	62,1%	73,4%	52,2%	**53,0%**

Table 34: Using a tablet on a daily basis (on people having access to a tablet in their household; 2015: N=1.271, 2014: N=1.131)

CONNECTIVITY

- The large majority of tablet owners connect to the Internet through a wireless network. However 5,8% state that they do not engage in wireless surfing with their tablet.
- The most popular way of connecting your tablet to the Internet by far is through the Wi-Fi network in one's home (88,3%). The figures for use of a Wi-Fi network in someone else's home (Wi-Fi Fon Spot or Homespot) or a public hotspot (e.g. in the station or at the airport) are significantly lower (16,7% and 14,6% respectively).
- One in ten respondents (9,6%) say they use mobile internet on their tablet.
- There are also clear age differences in terms of connectivity. For those under 50, tablets are used sporadically at home, in an armchair or even in bed. This means the Wi-Fi connection at home is sufficient to connect to the internet. In the over-50s segment, the tablet plays a more central role and is often also used outside of the home. This means these users tend to use Wi-Fi networks in other people's homes, as well as public hotspots and mobile internet more frequently.

WIRELESS SURFING ON TABLETS



Graph 47: Used internet connection for tablet (on people having access to a tablet in their household, N=1.271)

WIRELESS SURFING ON TABLETS: BREAKDOWN BY AGE

	15-49	50+	TOTAL
Wi-Fi network at home	90,0%	85,4%	**88,3%**
Wi-Fi network in someone else's home	15,2%	19,2%	**16,7%**
Public hotspot	12,1%	19,0%	**14,6%**
Mobile internet	8,2%	12,0%	**9,6%**
I don't do wireless surfing on my tablet	4,6%	7,9%	**5,8%**
Don't know	1,3%	0,9%	**1,1%**

Table 35: Breakdown by age for used internet connection for tablet (on people having access to a tablet in their household, N=1.271)

ACTIVITIES ON THE TABLET

- We have already seen that the daily use of a tablet has strongly decreased (from 69,4% in 2014 to 53,0% in 2015). This is also reflected in the daily activities that are carried out on the tablet. The composition of the top 5 activities is the same, but the share of tablet owners for whom these activities are a daily routine, has dropped significantly.

- Reading e-mails continues to be the most popular daily activity on the tablet (41,9%). However it has sharply dropped compared with last year (52,1% at the time, or a drop of 10,2 percentage points). This is the sharpest drop.

- Other popular daily activities include searching for information online (39,8%), using social networks (37,4%), sending e-mails (34,1%) and visiting news websites (29,1%).

- Activities such as e-commerce, internet calls, office applications and online banking are a daily routine on the tablet for very few Flemish people (1,2%, 3,2%, 4,5% and 5,0%). This does not mean that Flemish tablet users have no experience with this. About 1 in 5 users say they use the tablet monthly for buying or selling goods, for making internet calls or using office applications. The figure even increases to 1 in 3 for online banking.

- Previously in this chapter, we noted that tablets are mainly shared in the household among users under 50 years of age, whereas they are personal possessions for users over 50. The usage frequency of a tablet was also higher in the over-50 category. In addition to this, we can now also conclude that there is a clear difference in the popularity of daily applications. In the over-50 category, tablets are often personal devices which play a central role. Functional applications are especially popular in this segment (e-mail, searching for information, news websites, online banking). In the under-50 category, the tablet plays a less central role and is a supplement to the smartphone or laptop. When the tablet is used on a daily basis, the under-50 segment mainly uses it for entertainment purposes (chatting, making and sharing photos and videos, music and audio-visual content). Gaming on the tablet is an exception to the rule: it is popular across all segments.

ACTIVITIES ON THE TABLET

	EVER	MONTHLY	DAILY	EVOLUTION DAILY 2015-2014
Reading e-mails	84,0%	68,8%	41,9%	**-10,2**
Searching for info	89,0%	78,2%	39,8%	**-6,5**
Social media	76,2%	62,6%	37,4%	**-2,7**
Sending e-mails	81,6%	65,1%	34,1%	**-4,6**
Visiting news sites	78,8%	59,4%	29,1%	**-8,3**
Playing games	61,1%	39,4%	17,3%	**-7,0**
Chat	57,1%	36,8%	15,7%	**+4,3**
Taking photos/videos	71,2%	39,0%	9,4%	**+1,2**
Tablet as MP3 player	45,5%	26,3%	6,3%	**-1,7**
Sharing photos/videos online	56,5%	27,5%	5,9%	**+0,2**
Streaming music	38,7%	23,2%	5,8%	**+0,2**
Tablet as e-reader	45,6%	21,4%	5,5%	**-4,4**
Online banking	48,9%	34,4%	5,0%	**+0,2**
Office (Word, Excel,...)	49,7%	20,1%	4,5%	**+0,0**
Streaming movies/series	34,2%	17,8%	4,0%	**+1,1**
Making online phone calls (e.g., Skype, Facetime)	46,9%	20,5%	3,2%	**+0,8**
Live internet radio	36,7%	15,3%	3,1%	**-1,6**
Downloading music	22,3%	9,9%	1,8%	**-0,3**
E-commerce (buying/selling online)	45,6%	20,7%	1,2%	**+0,0**
Downloading movies/series	14,6%	4,6%	0,8%	**-0,6**
Podcast (streaming or downloading a previously aired radio show)	18,0%	5,0%	0,8%	**-0,3**

Table 36: Internet activities on tablet (on people having access to a tablet in their household, N=1.271)

DAILY ACTIVITIES ON TABLET: BREAKDOWN BY AGE (15-49 VS. 50+)

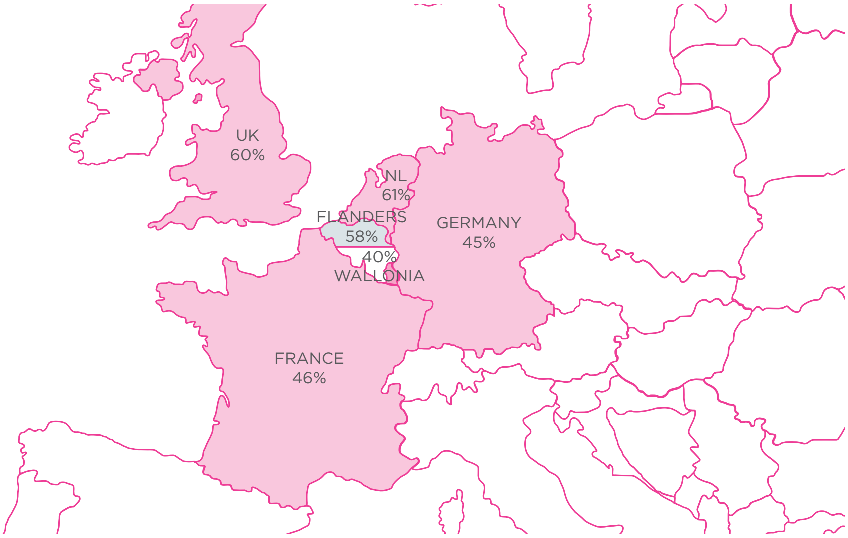
	15-49	50+	TOTAL
Reading e-mails	37,7%	49,7%	**41,9%**
Searching for info	38,0%	43,2%	**39,8%**
Social media	38,5%	35,5%	**37,4%**
Sending e-mails	30,3%	41,1%	**34,1%**
Visiting news sites	25,5%	35,9%	**29,1%**
Playing games	16,9%	18,0%	**17,3%**
Chat	19,6%	8,5%	**15,7%**
Taking photos/videos	10,6%	7,0%	**9,4%**
Tablet as MP3 player	7,7%	3,7%	**6,3%**
Sharing photos/videos online	7,5%	2,9%	**5,9%**
Streaming music	8,2%	1,4%	**5,8%**
Tablet as e-reader	4,7%	6,9%	**5,5%**
Online banking	3,5%	7,9%	**5,0%**
Office (Word, Excel,...)	3,8%	5,6%	**4,5%**
Streaming movies/series	5,3%	1,7%	**4,0%**
Making online phone calls (e.g., Skype, Facetime)	3,5%	2,7%	**3,2%**
Live internet radio	2,5%	4,1%	**3,1%**
Downloading music	2,5%	0,3%	**1,8%**
E-commerce (buying/selling online)	1,6%	0,5%	**1,2%**
Downloading movies/series	0,8%	0,8%	**0,8%**
Podcast (streaming or downloading a previously aired radio show)	1,0%	0,6%	**0,8%**

Table 37: Daily internet activities on tablet (on people having access to a tablet in their household, N=1.271)

FRAMING THE DATA

Just like last year, we can conclude that the tablet is a popular instrument in Flanders. With 58% of the population having access to a tablet in their household, Flanders is about at the same level as the Netherlands (61%) and the United Kingdom (60%). France (46%) and Germany (45%) follow at ample distance. Adoption rates of tablets are the lowest (40%) in Wallonia.

TABLET ADOPTION



Graph 48: Adoption of tablets in Flanders and neighboring regions.

Source UK, France and Germany: Deloitte– "Global Mobile Consumer Survey 2015" (http://bit.ly/DLT_GMCS2015)
Source the Netherlands: Telecompaper – "Dutch tablet market still growing, fifth of households have at least 2 tablets" (http://bit.ly/Telecompaper_Tablet)
Source Wallonia: Digital Wallonia – "Baromètre 2015 des usages numériques des citoyens wallons" (http://bit.ly/DigiWal_Barometre2015)

From digiMeter, we learn that the adoption of tablets gradually seems to be reaching a ceiling. This fits a worldwide trend in which we see global tablet sales declining. The number of shipped tablets fell by 7,7% compared to 2014.[1] In 2015, a total of 212 million tablets were shipped. This is still more than laptops (167,5 million) and desktop computers (125,5 million), but far below the 1,4 billion shipped smartphones.

[1] Source: IDC – Various reports (http://bit.ly/IDC_PCshipments, http://bit.ly/IDC_ConnDev, http://bit.ly/IDC_TabletShipments, http://bit.ly/IDC_SmartphoneShipments)

WORLDWIDE SHIPMENTS TABLETS, SMARTPHONES AND COMPUTERS – IN MILLIONS

	2014 (MILLIONS)	2014 (SHARE %)	2015 (MILLIONS)	2015 (SHARE %)	EVOLUTION
Tablet	**229,7**	**12,5%**	**212,0**	**10,9%**	**-7,7%**
Smartphone	1.300,4	70,7%	1436,5	74,0%	+10,5%
Desktop	133,8	7,3%	125,5	6,5%	-6,2%
Laptop	174,3	9,5%	167,5	8,6%	-3,9%
Total computer	308,1	16,8%	293,1	15,1%	-4,9%
TOTAL	**1.838,2**	**100,0%**	**1941,6**	**100,0%**	**+5,6%**

Table 38: Worldwide shipments of tablets, in comparison to shipments of computers and smartphones (figures in millions). Source: IDC

PROFILING THE TABLET USER

digiMeter results indicate that people over fifty are the most avid tablet users. They own a personal tablet more often and use it outdoors more frequently, while tablets in younger segments are often shared devices which rarely leave the house.

Internationally, we also mainly see the elder segments owning and using (personal) tablets. Worldwide, GlobalWebIndex[2] states that 35-44-year-olds own personal tablets most often (50%), and even 45-to-54-year-olds (46%) and 55-to-64-year-olds (40%) are more likely to have personal tablets than 16-to-24-year-olds (36%).

In the UK, Ofcom[3] suggests that ownership of tablets is highest among those aged between 35 and 54 years. 22% of those over 35 indicate that a tablet is their main device to go online. This is also true for 17% of the 25-34-year-olds and 11% of the 16-24-year-olds.

[2] Source: GlobalWebIndex – "55-64s more likely to own a tablet than 16-24s" (http://bit.ly/GWI_TabletAge2015)

[3] Source: Ofcom – "The Communications Market Report – UK edition - 2015" (http://bit.ly/Ofcom_CMR_UK_2015)

CHAPTER 04

TELEPHONY

TELEPHONY

CHAPTER 04

INFOGRAPHIC

TELEPHONE:
Smartphone on the rise in Flanders

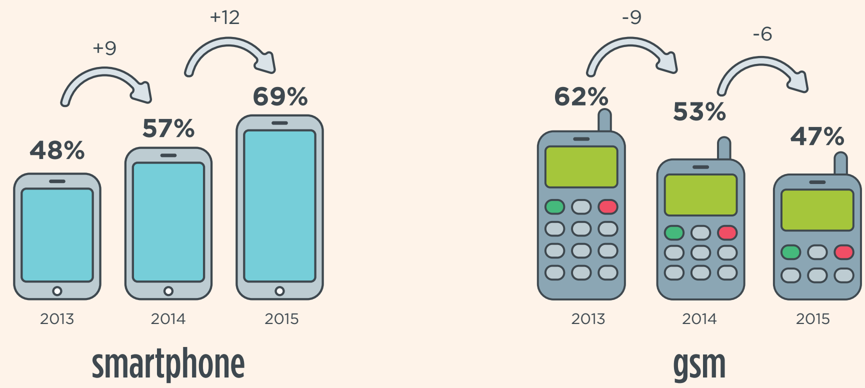
99%
has at least one type of telephone at home

70%
has a fixed telephone line (landline)

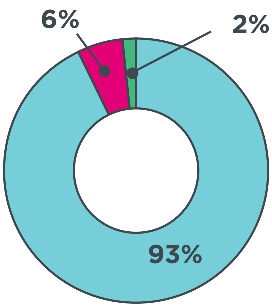
97%
has a mobile phone (GSM or smartphone)

Evolution smartphone versus GSM

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



Smartphone is mainly a personal device



Who uses the most frequently used smartphone within your family?

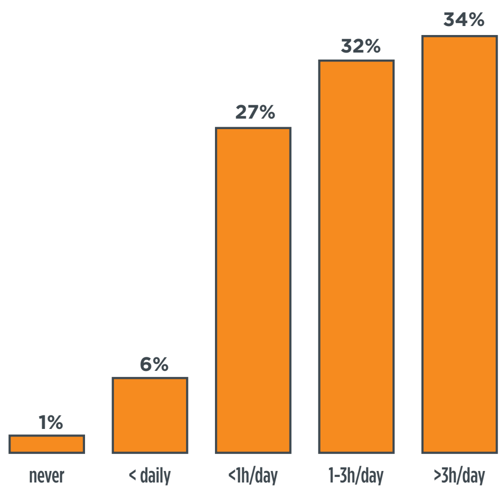
mainly myself

both myself and others

only others

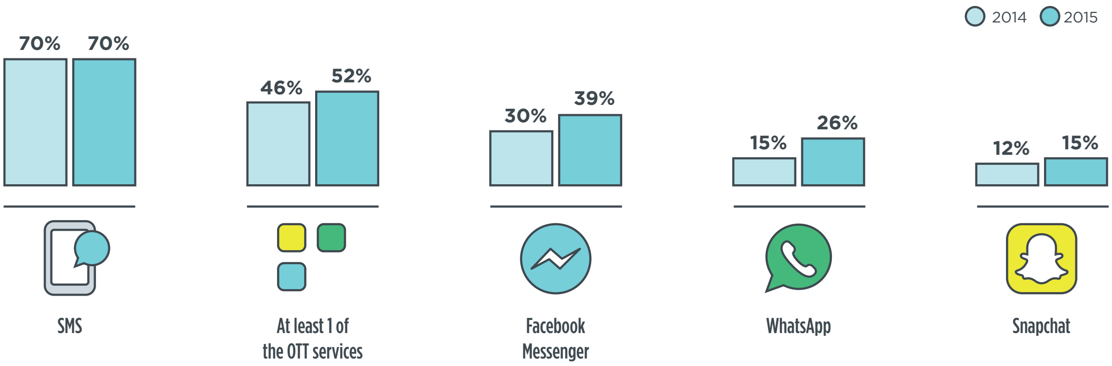
Use of smartphones

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



Mobile messaging

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



GENERAL FACTS & FIGURES (N=2.181)

99,2% (-0,4)

Telephony is available to almost everyone in Flanders

97,1%
Mobile phone (+0,9)

70,4%
Fixed telephone line (+2,0)

68,3%
Both (+3,3)

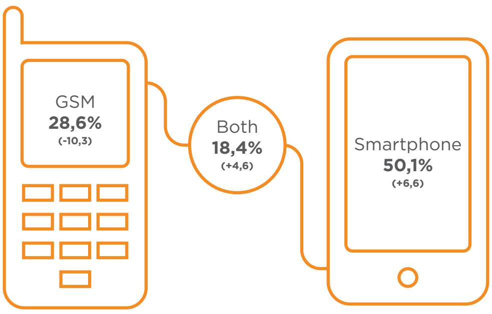
The gap between the smartphone (68,5%) and GSM (47,0%) has deepened.

ADOPTION SMARTPHONE VS. GSM

- Last year the adoption of smartphones (57,3%) was higher than the adoption of GSM (52,7%) for the first time. In 2015, this difference increased at a rapid pace, and already comes to 21,6 percentage points. The adoption of smartphones increased by 11,2 percentage points to 68,5%, whereas the adoption of GSM dropped by 5,7 percentage points to 47,0%.
- 18,4% of people have both a smartphone and a GSM (+4,6).
- Nowadays employers rarely pay for the landline (2,1%) or a GSM (3,2%). Almost one in 10 respondents (9,2%) say they received a smartphone from an employer.
- GSM ownership is highest amongst the older age categories (50+), lower educated people, smaller households (2 members at the most) and households with a lower income.
- With almost 7 out of 10 Flemish people owning a smartphone, smartphones can now be found across all sections of the population. Even among people over 65, we see that 1 in 3 people now own a smartphone. However this does not remove the clear distinction that still exists between the profile of the smartphone adopter and the GSM adopter. Smartphones have the highest adoption level among the under-50s, the higher educated, in a (medium to) large family, and respondents with an average to high household income.

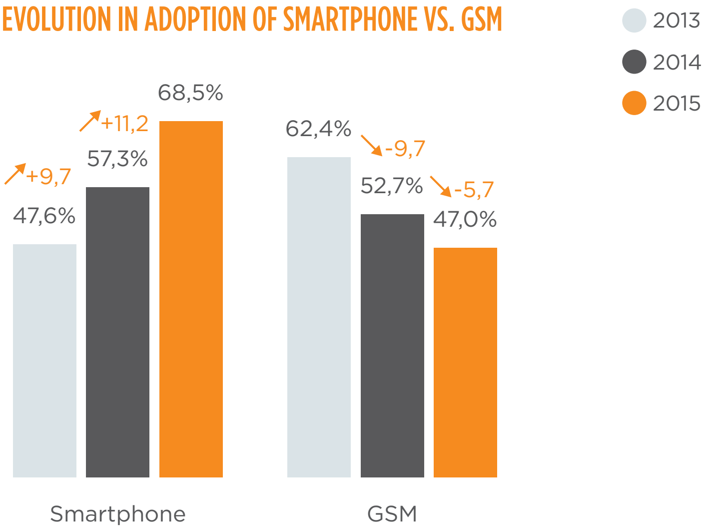
ADOPTION SMARTPHONE VS GSM

Total adoption mobile phones: **97,1%**



Graph 49: Adoption smartphone vs GSM (N=2.181)

EVOLUTION IN ADOPTION OF SMARTPHONE VS. GSM



Graph 50: Evolution in adoption of smartphone vs. GSM (2015: N=2.181, 2014:N=2.028, 2013: N=3.519)

PERSONAL OWNERSHIP VS. OBTAINED THROUGH EMPLOYER

	LANDLINE	GSM	SMART-PHONE
Personal	68,3%	43,7%	59,2%
Both	0,3%	0,9%	2,5%
Through employer	1,8%	2,3%	6,7%
None	29,6%	53,0%	31,5%

Table 39: Telephony: Personal ownership vs. through employer (N=2.181)

PROFILING GSM ADOPTERS (N=1.025)

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION [1]
Gender			
Men	46,1%	48,1%	**98**
Women	47,8%	51,9%	**102**
Age			
15-19	40,6%	5,7%	**86**
20-29	33,4%	10,1%	**71**
30-39	31,1%	10,0%	**67**
40-49	33,3%	11,9%	**71**
50-59	52,0%	19,1%	**111**
60-64	54,6%	8,4%	**117**
65+	71,5%	34,9%	**152**
Degree			
No degree or primary education	65,9%	20,8%	**140**
Lower secondary education	60,3%	25,3%	**128**
Higher secondary education	44,1%	34,0%	**94**
Bachelor degree	37,8%	12,9%	**81**
Master or post-university degree	24,8%	6,9%	**52**
Household situation			
Single without children	56,2%	23,4%	**119**
Single with child(ren)	42,5%	4,4%	**92**
Married/living together without children	53,4%	33,1%	**114**
Married/living together with child(ren)	37,8%	22,3%	**81**
Living with both parents	40,8%	10,0%	**87**
Living with one parent	46,1%	5,5%	**98**
Living with others	37,0%	1,4%	**78**

Table 40: Profiling of GSM owners (N=1.025)

[1] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 34,9% of GSM owners are aged 65 or more. This profile constitutes 22,9% of the population (Flanders 15+). of the population of Flanders aged 15 or more. The result is an index of 152, which indicates that the over-65s are overrepresented among GSM owners.

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION [1]
Household members			
1	56,4%	23,3%	**120**
2	51,9%	38,5%	**110**
3	42,5%	15,6%	**91**
4	36,0%	15,3%	**77**
5	40,7%	5,4%	**87**
6	42,4%	1,7%	**89**
> 6	27,5%	0,3%	**75**
Occupation			
Student	38,1%	11,1%	**81**
Blue-collar worker	42,4%	7,1%	**90**
White-collar worker	31,8%	16,8%	**68**
Public servant/teacher	35,8%	7,3%	**76**
C-level (e.g.., CEO, CFO,...)	20,1%	0,5%	**45**
Self-employed	50,5%	4,9%	**107**
Liberal profession	21,0%	0,1%	**33**
Houseman/-wife	58,1%	2,9%	**121**
Unemployed	56,3%	9,7%	**120**
Retired	67,8%	39,4%	**144**
Other	29,4%	0,2%	**67**
Net income			
< €1.000	57,4%	2,9%	**121**
€1.000 - €1.500	63,8%	12,5%	**136**
€1.501 - €2.000	56,8%	15,0%	**121**
€2.001 - €3.000	45,9%	13,7%	**98**
€3.001 - €4.000	37,2%	12,5%	**79**
€4.001 - €5.000	26,9%	4,8%	**58**
> €5.000	35,2%	4,0%	**75**
Don't know	45,3%	12,3%	**96**
Prefer not to say	53,1%	22,5%	**113**

Table 41: Profiling of GSM owners (N=1.025)

[1] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 34,9% of GSM owners are aged 65 or more. This profile constitutes 22,9% of the population (Flanders 15+). of the population of Flanders aged 15 or more. The result is an index of 152, which indicates that the over-65s are overrepresented among GSM owners.

PROFILING OF SMARTPHONE ADOPTERS (N=1.494)

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION[2]
Gender			
Men	70,8%	50,7%	**103**
Women	66,2%	49,3%	**97**
Age			
15-19	93,7%	9,0%	**136**
20-29	90,4%	18,9%	**132**
30-39	89,5%	19,6%	**131**
40-49	81,6%	20,0%	**119**
50-59	61,9%	15,6%	**91**
60-64	55,4%	5,8%	**81**
65+	33,2%	11,1%	**48**
Degree			
No degree or primary education	42,4%	9,2%	**62**
Lower secondary education	53,8%	15,5%	**79**
Higher secondary education	75,9%	40,1%	**111**
Bachelor degree	78,2%	18,3%	**114**
Master or post-university degree	87,5%	16,8%	**127**
Household situation			
Single without children	51,6%	14,7%	**75**
Single with child(ren)	71,3%	5,0%	**104**
Married/living together without children	57,9%	24,6%	**85**
Married/living together with child(ren)	79,1%	32,0%	**116**
Living with both parents	88,2%	14,8%	**129**
Living with one parent	89,1%	7,2%	**129**
Living with others	60,6%	1,6%	**89**

Table 42: Profiling of GSM owners (N=1.025)

[2] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 9,0% of smartphone owners are between 15 and 19 years old. This profile constitutes 6,6% of the population of Flanders aged 15 or more. The result is an index of 136, which indicates that 15-19-year olds are overrepresented among smartphone owners.

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION [2]
Household members			
1	50,3%	14,3%	**74**
2	59,3%	30,2%	**87**
3	76,9%	19,3%	**112**
4	86,3%	25,2%	**126**
5	87,9%	8,0%	**129**
6	90,9%	2,5%	**132**
> 6	85,6%	0,5%	**125**
Occupation			
Student	92,3%	18,4%	**134**
Blue-collar worker	75,3%	8,7%	**110**
White-collar worker	86,5%	31,3%	**126**
Public servant/teacher	77,6%	10,9%	**114**
C-level (e.g.., CEO, CFO,...)	100,0%	1,7%	**155**
Self-employed	64,4%	4,3%	**93**
Liberal profession	83,3%	0,4%	**133**
Houseman/-wife	69,6%	2,4%	**100**
Unemployed	60,0%	7,1%	**88**
Retired	36,8%	14,7%	**54**
Other	41,0%	0,2%	**67**
Net income			
< €1.000	33,3%	1,2%	**50**
€1.000 - €1.500	46,2%	6,2%	**67**
€1.501 - €2.000	63,2%	11,5%	**93**
€2.001 - €3.000	73,2%	15,0%	**107**
€3.001 - €4.000	82,9%	19,1%	**121**
€4.001 - €5.000	88,2%	10,7%	**129**
> €5.000	84,3%	6,5%	**123**
Don't know	76,2%	14,2%	**111**
Prefer not to say	54,0%	15,7%	**79**

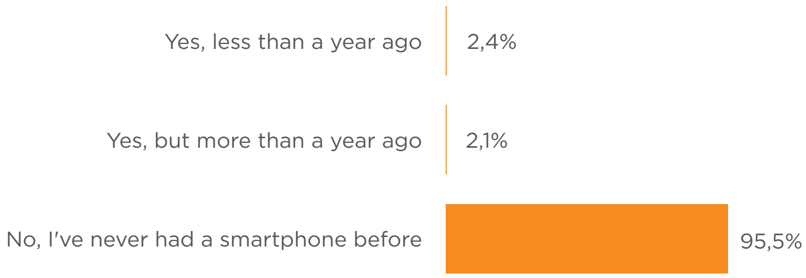
Table 43: Profiling of GSM owners (N=1.025)

[2] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 9,0% of smartphone owners are between 15 and 19 years old. This profile constitutes 6,6% of the population of Flanders aged 15 or more. The result is an index of 136, which indicates that 15-19-year olds are overrepresented among smartphone owners.

NOT HAVING A SMARTPHONE

- Only a small minority of the people who don't own a smartphone at the moment, used to have one in the past (4,5%).

DID YOU USE TO OWN A SMARTPHONE?



Graph 51: Did you use to have a smartphone? (on people who don't own a smartphone at the moment; N=688)

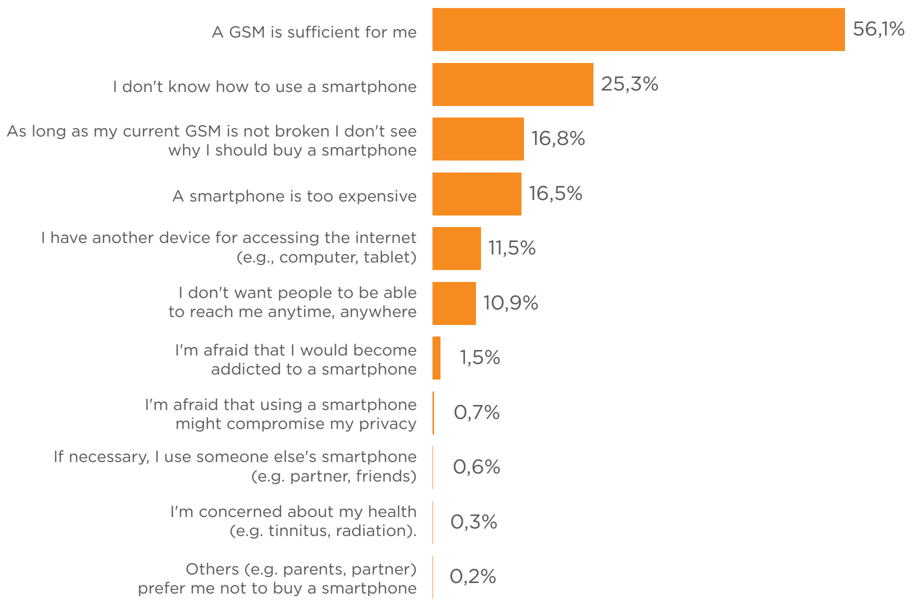
REASONS FOR NOT HAVING A SMARTPHONE

- People who have never had a smartphone before do not understand the added value of this device compared with a GSM. As a result, 56,1% state that a GSM is sufficient and 16,8% say that they have no reason for buying a smartphone as long as their GSM is not broken. A lack of skills (25,3%) and the expected cost (16,5%) are also often cited as obstacles.

- The added value (or, in fact, the lack thereof) of a smartphone compared with an ordinary GSM also plays a role for those who used to have a smartphone but have decided to do without one now.[3] Three out of ten respondents (30,5%) say that a GSM is actually sufficient for them. Other reasons include the cost (24,3%) and the fact that they have another device for accessing the internet (23,2%). Their experience with a smartphone may have made them realise that they do not know how to use it (10,1%), that they have even developed an aversion to smartphones (5,6%), or that they did not use it enough (2,7%). The growing number of people who now also use both a smartphone and a GSM (18,4%, an increase of 4,6 percentage points compared with last year) must therefore probably also be seen in the context of people's attempts to prevent smartphones from becoming too intrusive in our lives. It is worth noting that it is not the people in the older segments who have consciously moved away from smartphones. 35,5% of those who used to have a smartphone but no longer have one are under 30. Naturally this figure must be taken with the necessary caution, in view of the small size of the sample. However, it is striking to note that it is not just the older segments who are moving away from smartphones - out of frustration because they found using a smartphone too difficult – but also (and especially) younger people who are consciously choosing to stop using a smartphone.

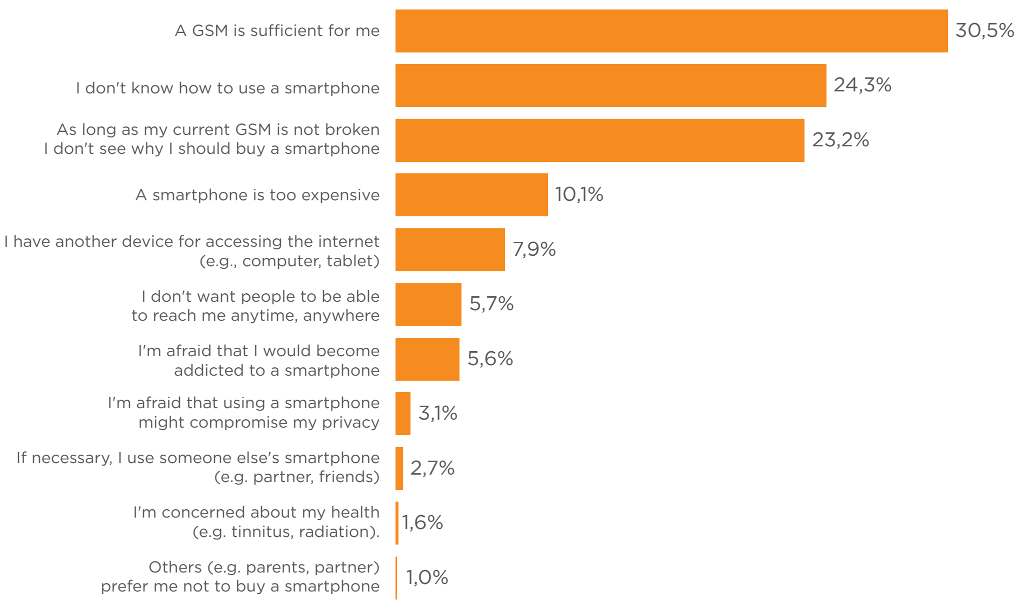
[3] Due to low sample size (N=31), the results should be considered with caution.

NEVER HAD A SMARTPHONE



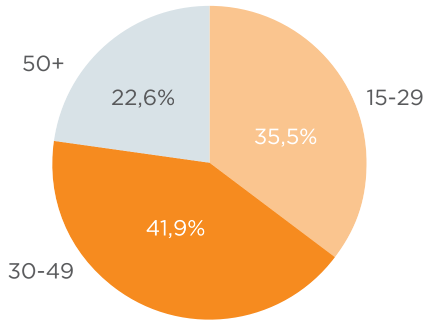
Graph 52: What are the main reasons why you don't have a smartphone?
(for people who have never had a smartphone; N= 657)

I USED TO HAVE A SMARTPHONE



Graph 53: What are the main reasons why you don't have a smartphone?
(for people who used to have a smartphone but no longer have one; N= 31)

USED TO HAVE A SMARTPHONE - BREAKDOWN BY AGE



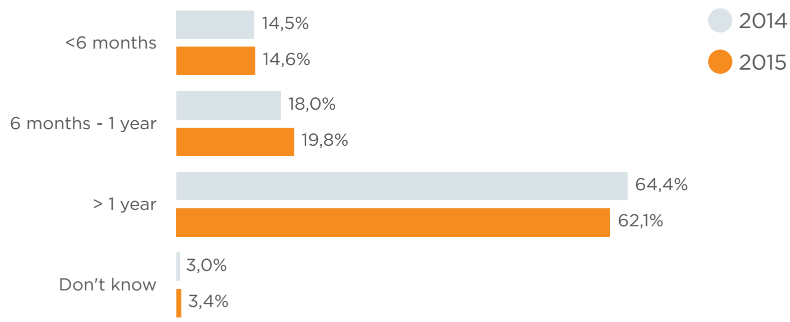
Graph 54: Age distribution for people who used to have a smartphone, but no longer have one (N=31)

AGE OF MOST FREQUENTLY USED MOBILE PHONE

- Most mobile phones are more than one year old (62,1%).

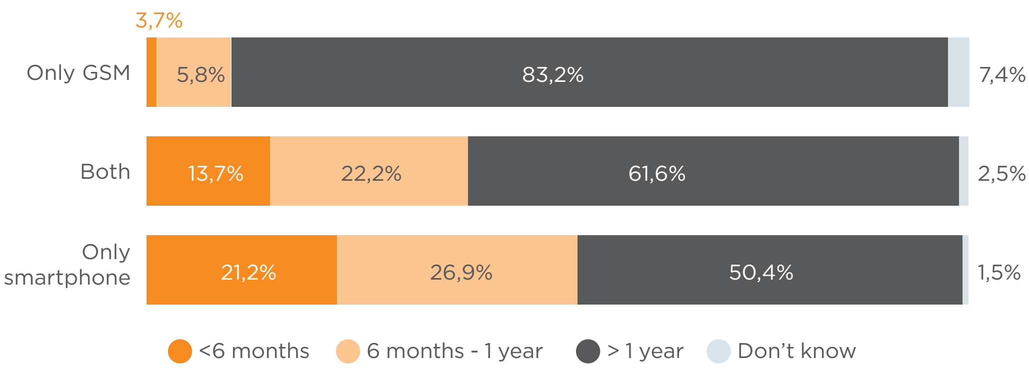
- If we cross the age of the most frequently used mobile phone with the type of device(s) that people own (GSM, smartphone or both), there are some major differences. Among the people who only own a GSM, 83,2% say that their device is at least one year old. Only half of the people who only own a smartphone have a device more than one year old (50,4%). Those who say they own both are in between the two (61,6%).

AGE OF MOST USED MOBILE PHONE (GSM OR SMARTPHONE)



Graph 55: Age of most used mobile phone
(on people owning a GSM or smartphone; 2015: N=2.118, 2014: N=1.953)

AGE OF MOST USED MOBILE PHONE

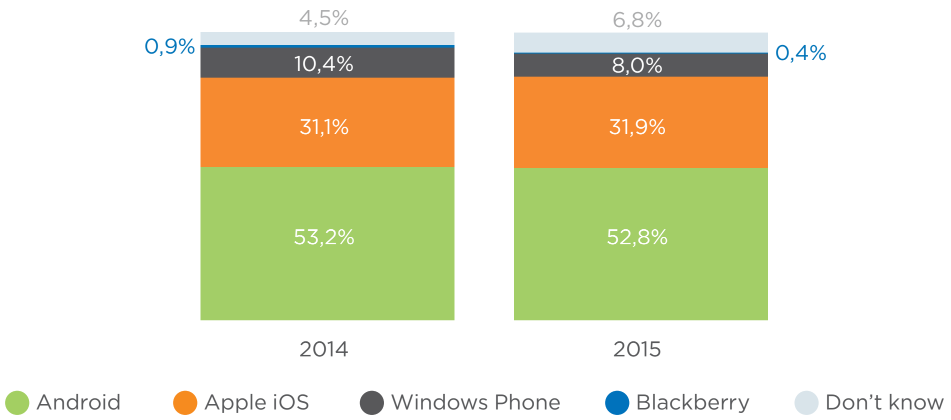


Graph 56: Age of most frequently used mobile phone - Breakdown by ownership of a GSM, smartphone or both
(on people owning a GSM or smartphone; N=2.118)

OPERATING SYSTEM OF THE MOST FREQUENTLY USED SMARTPHONE

- Android remains the most popular smartphone operating system at 52,8% (-0,4), with iOS in second place at 31,9% (+0,8).

OPERATING SYSTEM MOST USED SMARTPHONE



Graph 57: Operating system most frequently used smartphone
(on people owning a smartphone; 2015: N= 1.494, 2014: N=1.163)

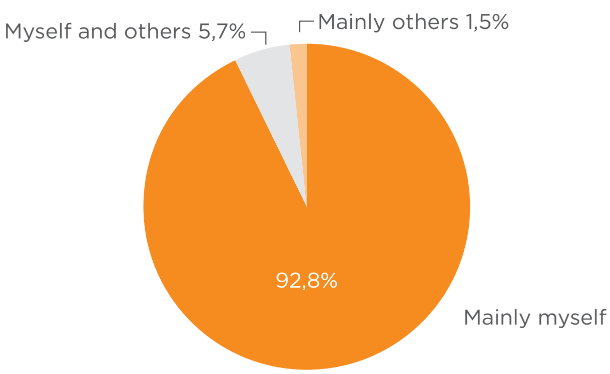
USING A SMARTPHONE

- The smartphone is a personal device. Almost 9 out of 10 respondents (92,8%) say that they are the main (or only) user of their smartphone, whereas 5,7% share their smartphone with others. This is in stark contrast with the tablet, which often is a less personal device (41,3%) than a smartphone and is often shared within a household (41,9%) (see Tablet section).

- When people share a smartphone, then it is mainly their partner (57,8%) and children (48,7%) who also use it.

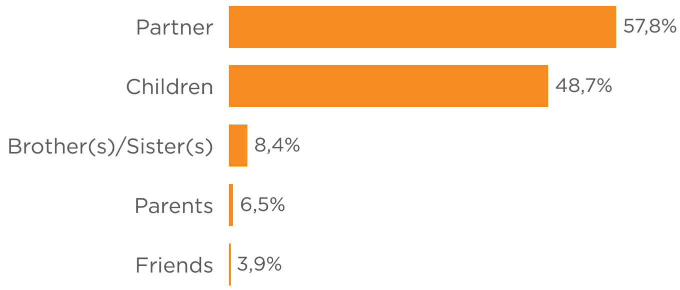
- Almost everyone who owns a smartphone also uses it daily (92,5%). Almost one out in every three respondents (34,0%) say they spend three or more hours daily on their smartphone.

WHO USES THE MOST FREQUENTLY USED SMARTPHONE IN YOUR HOUSEHOLD?



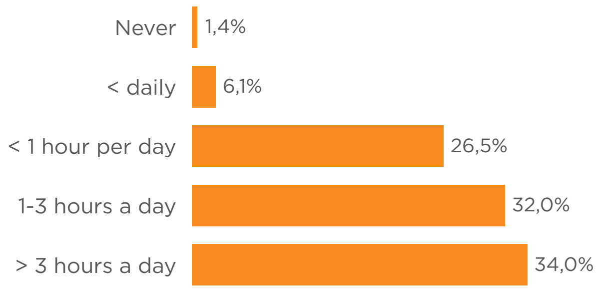
Graph 58: Who uses your most frequently used smartphone (among smartphone users; N= 1.494)

WHO (ELSE) USES THIS SMARTPHONE?



Graph 59: Who else uses this smartphone
(among those who own a smartphone and share it with others; N= 108)

USING A SMARTPHONE

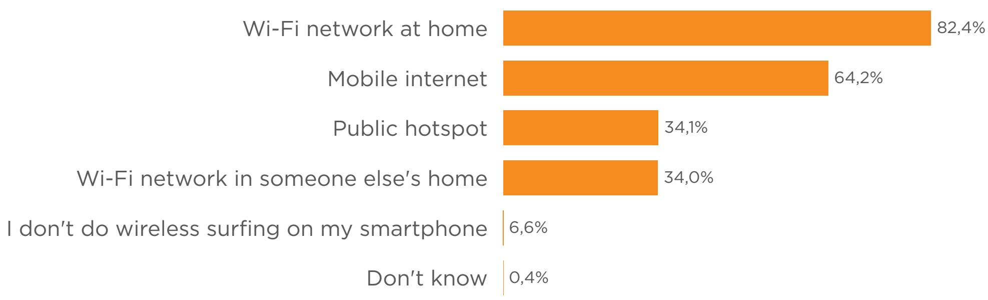


Graph 60: How often do you use this smartphone yourself
(among smartphone owners; N=1.494)

CONNECTIVITY

- As with the tablet, the home Wi-Fi network is the most frequently used type of internet connection on smartphones (82,4%). In contrast with tablets, however, this often supplemented with other connections such as mobile internet (64,2%), a public hotspot (34,1%) or a Wi-Fi network in someone else's home (34,0%). This shows that a smartphone is much more mobile as a device than a tablet.

WIRELESS SURFING ON SMARTPHONE



Graph 61: Used internet connection on smartphone
(on people owning a smartphone, N=1.494)

ACTIVITIES ON SMARTPHONE

- Over half of the smartphone owners use their smartphones for reading e-mails (63,0%) and checking social media (60,4%) on a daily basis.
- Other popular daily activities on a smartphone are searching for information (48,8%), sending e-mails (41,8%) and visiting news sites (37,7%).
- Activities that are least likely to be done on a smartphone (% that replied "Never" for the activity) are downloading movies/series (92,5%), listening to a podcast (85,4%) and streaming movies/series (78,2%).
- Previously we saw that one in three people over 65 has a smartphone. However they use their smartphone a lot less on a daily basis than the other age categories. They only tend to use their smartphone on a daily basis for online banking more (12,5%) than the overall population (7,0%).

INTERNET ACTIVITIES ON SMARTPHONE

	EVER	MONTHLY	DAILY	EVOLUTION DAILY 2015-2014
Reading e-mails	90,4%	78,6%	63,0%	**-2,0**
Social media	83,5%	75,9%	60,4%	**+3,8**
Searching for info	95,7%	82,5%	48,8%	**+4,5**
Sending e-mails	87,4%	71,4%	41,8%	**-2,2**
Visiting news sites	83,3%	65,9%	37,7%	**+0,6**
Smartphone as mp3-player	58,7%	43,0%	18,1%	**-2,1**
Playing games	59,7%	38,8%	18,0%	**+0,8**
Taking photos/videos	84,6%	70,8%	16,4%	**+1,1**
Streaming music	38,8%	25,4%	8,3%	**+1,2**
Online banking	45,9%	37,0%	7,0%	**+2,9**
Sharing photos/videos online	62,6%	43,2%	6,6%	**+0,6**
Fitness, health or sports applications	37,6%	21,5%	5,6%	**N/A**
Satellite navigation	75,1%	45,7%	4,7%	**-3,5**
Downloading music	23,9%	12,0%	2,6%	**+0,9**
Smartphone as e-reader	26,5%	10,4%	2,5%	**-0,6**
Streaming movies/series	21,8%	10,4%	2,4%	**+0,1**
Live internet radio	39,0%	16,5%	2,3%	**-2,3**
E-commerce (buying/selling online)	34,9%	16,7%	1,4%	**+0,5**
Podcast (streaming or downloading a previously aired radio show)	14,6%	4,1%	0,7%	**-0,5**
Downloading movies/series	8,5%	3,3%	0,5%	**+0,2**

Table 44: Internet activities on smartphone (on people owning a smartphone, N=1.494)

DAILY ACTIVITIES ON SMARTPHONE: FOCUS ON 65+

	65+	TOTAL
Reading e-mails	47,7%	**63,0%**
Social media	21,7%	**60,4%**
Searching for info	26,2%	**48,8%**
Sending e-mails	31,0%	**41,8%**
Visiting news sites	30,0%	**37,7%**
Smartphone as mp3-player	0,5%	**18,1%**
Playing games	8,2%	**18,0%**
Taking photos/videos	7,4%	**16,4%**
Streaming music	0,0%	**8,3%**
Online banking	12,5%	**7,0%**
Sharing photos/videos online	3,2%	**6,6%**
Fitness, health or sports applications	1,1%	**5,6%**
Satellite navigation	1,4%	**4,7%**
Downloading music	0,0%	**2,6%**
Smartphone as e-reader	5,3%	**2,5%**
Streaming movies/series	0,0%	**2,4%**
Live internet radio	0,5%	**2,3%**
E-commerce (buying/selling online)	0,0%	**1,4%**
Podcast (streaming or downloading a previously aired radio show)	0,0%	**0,7%**
Downloading movies/series	0,0%	**0,5%**

Table 45: Internet activities on smartphone (on people owning a smartphone; 65+: N=166; Total: N=1.494)

TRADITIONAL VERSUS WEB-BASED COMMUNICATION

- Even on their smartphones, people still tend to make phone calls most frequently via the traditional mobile network (42,6% daily). However, 3 out of 10 smartphone owners (29,4%) say that they use a web application like Skype or Facetime on their smartphones on a monthly basis for a phone conversation.

- When it comes to messaging, the traditional text message has managed to hold its ground easily in Flanders, with 70% of all smartphone owners sending a text message daily. The use of so-called "over the top" services[3] is on the increase, with 51,8% making daily use of one of the listed OTT services.[4] This is an increase of 5,2 percentage points compared with 2014. The most popular messaging apps are Facebook Messenger (39,3%) and WhatsApp (25,7%). These two apps have also seen the highest growth compared with last year (+9,6 and +10,7 percentage points).

- If we split the figures for the daily use of message services by age, we can see that sending text messages or messages through online apps on a daily basis is especially popular among younger smartphone users (15-29 years). The growing popularity of OTT message services therefore does not mean it will cannibalise the sending of text messages through mobile networks (in the short term). They seem to be used alongside each other.

- There are also striking age differences between the applications. Snapchat continues to be a very popular medium with young people: 66,5% of smartphone users between the ages of 15 and 19 years say they use Snapchat daily. This drops to 32,1% among 20 to 29-year olds and to below 8% in the older segments. WhatsApp, however, has a more even profile (37,0% for the youngest segment compared with 11,3% for the oldest segment). Nonetheless, Facebook Messenger continues to be the most popular online message service for every age group, with the exception of the over-65s, where WhatsApp has a higher daily adoption.

[3] "Over the top" services offer content and services, bypassing the traditional providers. Netflix offers online films and series, without requiring a cable subscription. In mobile telephony there are also several over the top players such as Skype and Facetime for spoken communication and Facebook Messenger and WhatsApp as an over-the-top message service. These providers bypass the link of the traditional mobile operators such as Proximus, Base and Mobistar. You do not need call credit or SMS volume. All you need is an internet connection.

[4] 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 (39,3% + 25,7% + 4,7% + 15,3% + 50,6% = 135,6%) is higher than the net number of people using any web-based app on a daily basis (51,8%).

TRADITIONAL VERSUS WEB-BASED COMMUNICATION

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

Table 46: Classic versus web-based communication (on people owning a smartphone, N=1.494)

CLASSIC VERSUS WEB-BASED MESSAGING, BREAKDOWN BY AGE

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

Table 47: Classic versus web-based messaging, breakdown by age (on people owning a smartphone, N=1.494)

[5] The iMessage item was only shown to those who indicated they owned an iPhone (smartphone with iOS as an operating system). In the questionnaire, the text message were replaced with iMessage because it is the main platform on the iPhone which you can use for sending text messages or OTT messages. The iMessage figures have therefore been filtered to owners of an iPhone (N=476), whereas the figures for text messages have been filtered to people with a smartphone with another operating system (N=1.018).

FRAMING THE DATA

Last year, we stated that Flanders was at the forefront of tablet ownership but lagging behind in smartphone ownership (despite strong growth). This year, we see that the strong growth in smartphone ownership did not suffice to catch up with countries like the Netherlands (84%), UK (76%) or Germany (75%). With 69% of the Flemish population owning a smartphone, adoption is still higher than in France (61%). According to research by Digital Wallonia, the agency of the Walloon government to stimulate digital media and innovation, barely one in four has a smartphone in Wallonia.

SMARTPHONE ADOPTION

Graph 62: Adoption of smartphones in Flanders and neighboring regions.

Source UK, France and Germany: Deloitte– "Global Mobile Consumer Survey 2015" (http://bit.ly/DLT_GMCS2015)
Source the Netherlands: Telecompaper – "Dutch tablet market still growing, fifth of households have at least 2 tablets" (http://bit.ly/Telecompaper_Tablet)
Source Wallonia: Digital Wallonia – "Baromètre 2015 des usages numériques des citoyens wallons" (http://bit.ly/DigiWal_Barometre2015)

The number of shipped smartphones has been enormous over the last couple of years, especially compared to other devices like tablets, laptops en desktops.[1] In 2015, over 1,4 billion smartphones have been shipped, 10,5% more than the year before. This makes smartphones the only of the listed devices (smartphones, tablets, laptops and desktops) to show clear growth compared to last year. And more importantly: because of the strong share of smartphones in total sales (74% of all shipped devices in 2015 were smartphones), they singlehandedly caused the total market to grow compared to last year (+5,6%).

[1] Source: IDC – Various reports (http://bit.ly/IDC_PCshipments, http://bit.ly/IDC_ConnDev, http://bit.ly/IDC_TabletShipments, http://bit.ly/IDC_SmartphoneShipments)

WORLDWIDE SHIPMENTS TABLETS, SMARTPHONES AND COMPUTERS – IN MILLIONS

	2014 (MILLIONS)	2014 (SHARE %)	2015 (MILLIONS)	2015 (SHARE %)	EVOLUTION
Smartphone	**1.300,4**	**70,7%**	**1.436,5**	**74,0%**	**+10,5%**
Tablet	229,7	12,5%	212,0	10,9%	-7,7%
Desktop	133,8	7,3%	125,5	6,5%	-6,2%
Laptop	174,3	9,5%	167,5	8,6%	-3,9%
Total computer	308,1	16,8%	293,1	15,1%	-4,9%
TOTAL	**1.838,2**	**100,0%**	**1.941,6**	**100,0%**	**+5,6%**

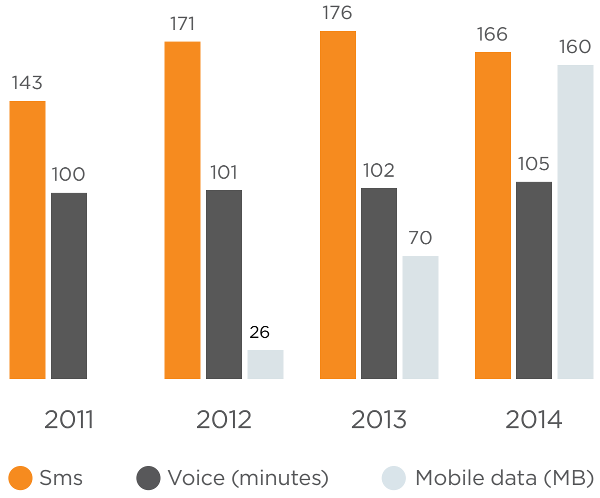
Table 48: Worldwide shipments of smartphones, in comparison to shipments of computers and tablets (figures in millions). Source: IDC

SMS REMAINS STABLE

The number of Flemish smartphone owners who send at least one SMS per day is stable at 70%. This does however not mean that the number of sent SMS messages remained stable as well. Each year, the BIPT (Belgian Institute for Postal services and Telecommunications) draws up consumption figures from the largest telecom players.[2] For the first time, the latest report (2014) showed a decline in the number of SMS messages sent. In 2013, an average of 176 messages were sent out per active SIM card each month. In 2014, this number fell to 166. This means that while the number of users is more or less stable, they switch between sending SMS messages and using over-the-top services like Facebook Messenger and WhatsApp. Typically, these messaging services are showing a lot more sent visual items (photos, images, video) over pure text. In part, the explosive growth of mobile data can be connected to this rising use of over-the-top messaging services. In 2013, an average active SIM card used 70 MB per month, which has risen to 160 MB in 2014. The average number of calling minutes (using the mobile network, not over-the-top services like Skype or FaceTime) is still slightly increasing per active SIM card.

[2] Source: BIPT – "Situatie van de elektronische communicatiesector 2014" (http://bit.ly/BIPT_TELCO)

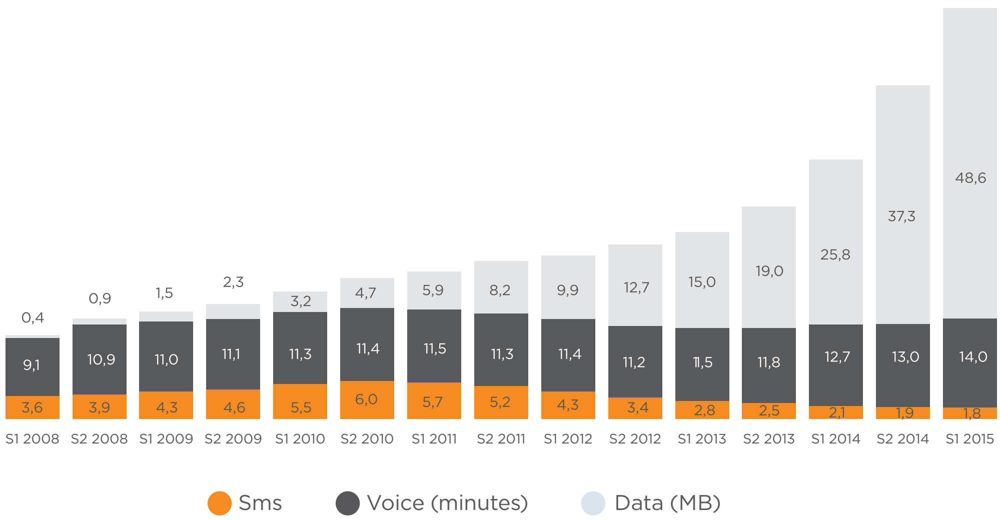
MONTHLY AVERAGE VOLUME PER ACTIVE SIM CARD (BELGIUM)



Graph 63: Monthly average volume per active sim card (source: BIPT)

Whether or not this decrease in number of sent SMS messages represents an exceptional drop or a structural decline is too early to conclude. However, there has been a noticeable turnaround in the Netherlands since 2011[3], where SMS traffic has systematically decreased while mobile data traffic increased exponentially. Dutch calling minutes have also increased slightly in the last couple of years, just like in Flanders.

TOTAL MOBILE VOLUME (THE NETHERLANDS) - IN BILLION



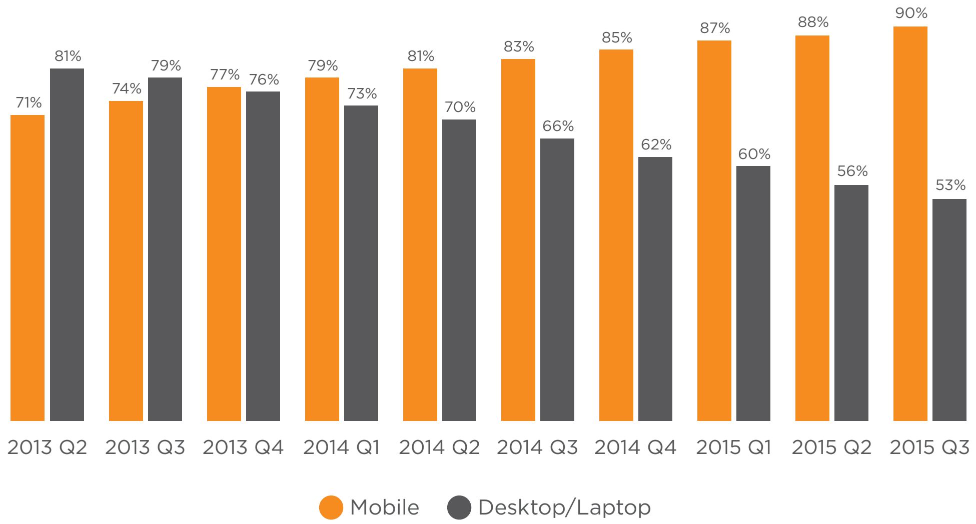
Graph 64: Total mobile volume - Figures in billion (source: ACM)

[3] Source: Autoriteit Consument & Markt (ACM) – "Telecommonitor" (http://bit.ly/ACM_telecommonitor)

OVER-THE-TOP MESSAGING

Worldwide, WhatsApp is the most popular web-based messaging service. In early September 2015, WhatsApp had 900 million monthly active users. A year before, that figure was 600 million.[4] Facebook Messenger is in second place with 700 million monthly active users[5]. With WhatsApp and Facebook Messenger, Facebook is holding two strong trump cards in the field of mobile messaging, very much in line with its strategy to mainly target mobile devices. Quarterly reports show that those who use Facebook, do so increasingly via smartphone or tablet.[6] Nine in ten of Facebook's active monthly users have already accessed the social network via a mobile device. A year ago, this figure was 83%. People browsing Facebook from a desktop or laptop are in a downward trend. In the third quarter of 2015, 53% of its monthly active members used a computer to visit Facebook. The year before, this figure was 66%.

FACEBOOK: SHARE OF MOBILE VISITORS VERSUS VISITORS VIA DESKTOP/LAPTOP WITHIN MONTHLY ACTIVE USERS



Graph 65: Facebook monthly active users: share of visitors via mobile devices (smartphone, tablet) versus visitors via computer (laptop, desktop). Sum exceeds 100% due to overlap (people who have visited Facebook both via mobile devices and via computers). Source: Facebook quarterly earnings.

[4] Source: Telecompaper – "WhatsApp groeit naar 900 miljoen gebruikers" (http://bit.ly/Telecompaper_WhatsappWW)

[5] Source: Quarz – "WhatsApp has 900 million monthly active users—but still no business model" (http://bit.ly/QZ_Messaging)

[6] Source: Graph based on quarterly earnings of Facebook (http://bit.ly/FB_QuartRes)

CHAPTER 05

SOCIAL MEDIA

SOCIAL MEDIA

CHAPTER 05

INFOGRAPHIC

SOCIAL MEDIA:
User profiles and main figures

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

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

44%
spends at least 1h a day on Facebook

♂ **50%** ♀ **50%**

30%
is older than 50

Age distribution of Facebook users

15 - 19	20 - 29	30 - 39	40 - 49	50 - 59	60 - 64	65+
19%	19%	17%	15%	12%	11%	7%

Main motivations in use

67% maintaining personal contacts

43% online visibility

30% passing time

GOOGLE+

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

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

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

♂ **57%** ♀ **43%**

Age distribution of Google+ users

15 - 19	20 - 29	30 - 39	40 - 49	50 - 59	60 - 64	65+
17%	19%	18%	13%	11%	12%	9%

Main motivations in use

No remarkable strengths compared to other networks

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

INFOGRAPHIC

LINKEDIN

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

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

3%
spends at least 1h a day on LinkedIn

♂ **65%** ♀ **35%**

Mostly men in active professional career

Age distribution of LinkedIn users

15 - 19	20 - 29	30 - 39	40 - 49	50 - 59	60 - 64	65+
4%	21%	23%	26%	13%	8%	4%

Main motivations in use

67%
set up and maintain professional contacts

30%
job search

TWITTER

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

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

12% spends at least 1h a day on Twitter

♂ **65%** ♀ **35%**

Mostly men between 15 and 39 years old

Age distribution of Twitter users

- 15 - 19: **21%**
- 20 - 29: **21%**
- 30 - 39: **22%**
- 40 - 49: **17%**
- 50 - 59: **11%**
- 60 - 64: **5%**
- 65+: **3%**

Main motivations in use

- **39%** following other persons or organizations
- **34%** news monitoring
- **25%** opinion sharing

INFOGRAPHIC

INSTAGRAM

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

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

21% spends at least 1h a day on Instagram

♂	♀
49%	51%

Mostly young people (15-19 years old)

Age distribution of Instagram users

15 - 19	20 - 29	30 - 39	40 - 49	50 - 59	60 - 64	65+
44%	26%	17%	9%	3%	2%	0%

Main motivations in use

38% consuming and sharing visual content

30% passing time

GENERAL FACTS & FIGURES (N=2.181)

77,0%
of the Flemish population has an account on at least one social media site (-1,7)[1]

Facebook still dominates the ranking, but YouTube has now hopped over Google+

66,9%	29,9%	23,4%
Facebook	YouTube	Google+

- The number of Flemings with a social media account is stagnating. In 2015, 77,0% of the Flemish population has an account on at least one social media site (-1,7).[1]

- Having an account doesn't necessarily mean using it often. While 77,0% of the respondents have an account on at least one social media site, only 72,4% of the population has logged in on a social network site in the last month.

- When Flemish people were asked about the social networks on which they had an account, Facebook (70,4%), Google+ (45,0%) and YouTube (41,7%) were the names that came up the most. If we look at which social network sites respondents logged onto in the past month, then the top three is the same, but the order is different. Facebook still dominates the ranking (66,9%), but YouTube (29,9%) has now hopped over Google+ (23,4%) into second place.

- With about 9 out of 10 Flemish people who have never had an account on these networks, Ello (96,7%), Reddit (95,6%), Swarm (92,4%) and Tumblr (90,8%) are among the least popular social networks on the list.

- Google+ is the network with the highest number of "dormant" accounts: 21,6% say they have an account on Google+ but have not used it in the past month.

- Besides the share of people who have an account but who do not use it that frequently, a limited number of people also made the effort to effectively delete their account. The only social networks on which at least 1% of the respondents have deleted their account are Facebook (2,5%), Foursquare (2,2%)[2], Twitter (1,9%), Google+ (1,3%) and Tumblr (1,0%).

[1] The 77,0% refers to the percentage of respondents who have an account on at least one of the social networks listed. In view of the fact that this list has been (slightly) adapted compared with last year, the evolution of this figure (-1,7 percentage points compared with last year) has to be interpreted with the necessary caution.

[2] Last year Foursquare was split into two apps: Foursquare and Swarm. Foursquare is increasingly becoming a social city guide, for sharing favourite restaurants, museums, attractions and so on. Swarm prioritises the check-in, allowing you to let people know where you are.

ACCOUNT ON SOCIAL NETWORK SITES

WHEN DID YOU LAST LOG INTO YOUR ACCOUNT ON THESE SOCIAL NETWORKS?

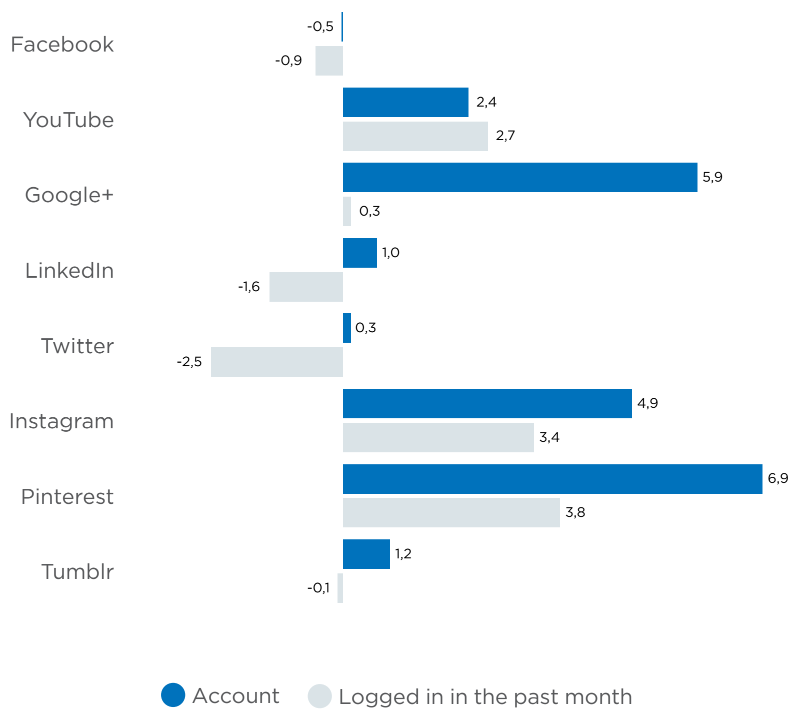
	I HAVE AN ACCOUNT AND I HAVE LOGGED IN IN THE PAST MONTH	I HAVE AN ACCOUNT BUT I HAVE NOT LOGGED IN IN THE PAST MONTH	I HAVE DELETED MY ACCOUNT ON THIS SITE	I HAVE NEVER HAD AN ACCOUNT ON THIS SITE
Facebook	66,9%	3,5%	2,5%	27,2%
YouTube	29,9%	11,8%	0,5%	57,9%
Google+	23,4%	21,6%	1,3%	53,7%
LinkedIn	19,4%	10,4%	0,9%	69,2%
Twitter	18,6%	11,8%	1,9%	67,7%
Instagram	17,0%	6,7%	0,9%	75,4%
Pinterest	12,5%	9,0%	0,6%	77,9%
Swarm	4,8%	2,2%	0,6%	92,4%
Foursquare	3,9%	5,0%	2,2%	88,9%
Tumblr	3,6%	4,6%	1,0%	90,8%
Reddit	2,5%	1,7%	0,2%	95,6%
Ello	0,4%	2,5%	0,4%	96,7%
One of the above	72,4%	4,6%	0,9%	22,1%

Table 49: When did you log in last on any of the social networks below? (N=2.181)

EVOLUTION FROM YEAR TO YEAR

- Facebook seems to have reached its saturation point in terms of the number of accounts (-0,5 percentage points compared with last year) and in terms of monthly users (-0,9 percentage points).
- We find the greatest increases in the number of accounts on Pinterest (+6,9), Google+ (+5,9) and Instagram (+4,9). The number of monthly users has increased for Pinterest (+3,8) and Instagram (+3,4); for Google+ (+0,3) the growth has stagnated.
- The number of accounts on Twitter and LinkedIn has slightly increased (+0,3 and +1,0), but the number of monthly users has dropped (-2,5 and -1,6).

ACCOUNTS AND MONTHLY USE OF SOCIAL MEDIA: EVOLUTION 2015-2014



Graph 66: Evolution for having an account and logging in to social networks every month
(2015: N=2.181, 2014: N=2.028)

ACTIVE USERS (% 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 (95,0% of the Flemish people that have a Facebook account have logged in to their account in the last month). With seven out of ten account owners having logged in during the last month, Instagram and YouTube (both 71,7%) share a second place when it comes to "active use".

- The number of active users dropped the most for Twitter (-9,0), Tumblr (-8,9), LinkedIn (-8,0) and Google+ (-7,1).

- Ello (13,8%) has the smallest group of active users by far. Foursquare (43,8%), Tumblr (43,9%) and Google+ (52,0%) have relatively few active users.

USE OF SOCIAL MEDIA LAST MONTH

	2015
Facebook (N= 1.535)	95,0%
Instagram (N=517)	71,7%
YouTube (N=982)	71,7%
Swarm (N=153)	68,6%
LinkedIn (N=651)	65,1%
Twitter (N=663)	61,2%
Reddit (N=92)	59,5%
Pinterest (N=470)	58,1%
Google+ (N=982)	52,0%
Tumblr (N=179)	43,9%
Foursquare (N=194)	43,8%
Ello (N=63)	13,8%

Table 50: On which of those social network sites did you log in last month?
(on those having an account on that social network site)

BREAKDOWN BY GENDER FOR SOCIAL MEDIA USAGE DURING LAST MONTH

- Facebook, Instagram, Tumblr and Ello are equally popular amongst men and women.
- Pinterest is the only social network which is significantly more adopted by Flemish women (16,2%) than men (8,7%).
- The other social networks have a mainly male audience.

HAVING AN ACCOUNT AND LOGGED IN LAST MONTH ON A SOCIAL NETWORK SITE, BREAKDOWN BY GENDER

		MEN	WOMEN	TOTAL
Facebook	(P>.999)	66,9%	66,8%	**66,9%**
YouTube	(P<.001)	39,7%	20,4%	**29,9%**
Google+	(P<.001)	27,0%	20,0%	**23,4%**
LinkedIn	(P<.001)	25,2%	13,7%	**19,4%**
Twitter	(P<.001)	24,4%	12,9%	**18,6%**
Instagram	(P=.648)	16,5%	17,4%	**17,0%**
Pinterest	(P<.001)	8,7%	16,2%	**12,5%**
Swarm	(P=.029)	5,9%	3,8%	**4,8%**
Foursquare	(P=.015)	4,9%	2,9%	**3,9%**
Tumblr	(P=.645)	3,4%	3,8%	**3,6%**
Reddit	(P<.001)	4,2%	0,8%	**2,5%**
Ello	(P>.999)	0,4%	0,4%	**0,4%**

Table 51: Having an account and having logged in last month on a social network site, breakdown by gender (N=2.181).
A p-value of less than .05 indicates a statistically significant difference (using an χ^2-test) between men and women in having logged in last month.

BREAKDOWN BY AGE FOR SOCIAL MEDIA USAGE DURING LAST MONTH

- Age is clearly negatively correlated to having an active account on social media: the adoption rate is higher amongst the youngest age groups.
- LinkedIn is mainly popular among 20-49 year olds.
- Google+, Twitter, are mostly used by 15-39 year olds.
- Other social media sites such as Facebook, YouTube, Instagram, Pinterest, Swarm, Foursquare, Tumblr and Reddit have a younger profile (mainly popular by the less than 30 years old).

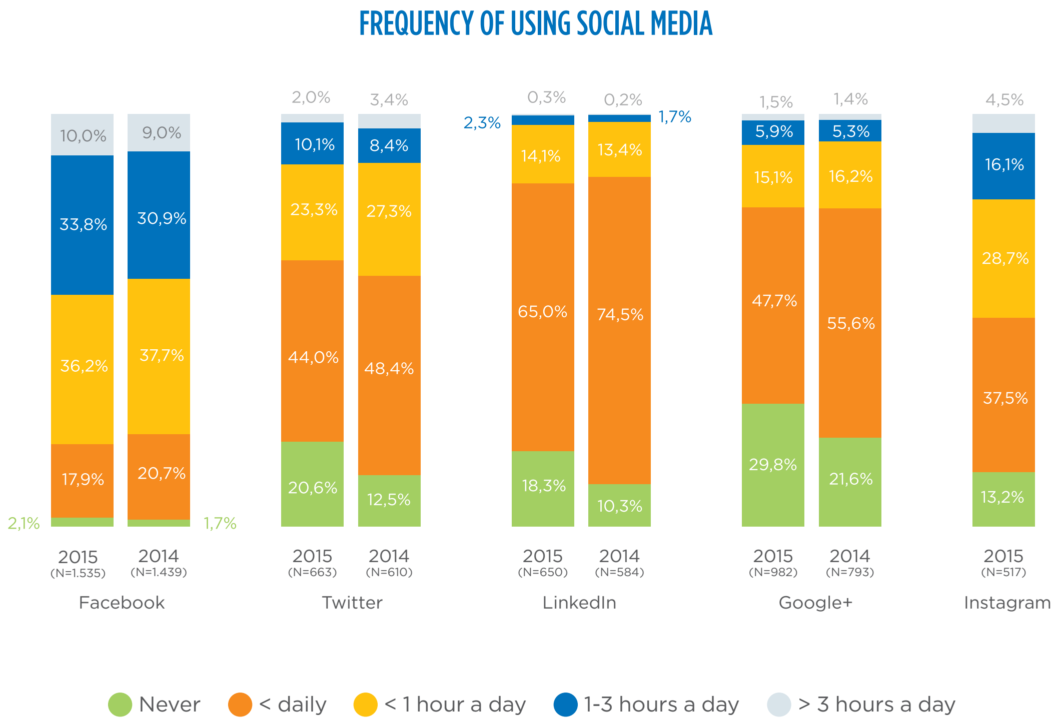
USE OF SOCIAL MEDIA LAST MONTH PLOTTED BY AGE

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Facebook (p<.001)	95,1%	94,5%	82,0%	74,5%	59,9%	56,7%	34,5%	**66,9%**
YouTube (p<.001)	60,2%	56,2%	37,1%	28,0%	20,9%	14,7%	12,9%	**29,9%**
Google+ (p<.001)	29,9%	33,2%	30,6%	22,9%	19,4%	20,6%	15,2%	**23,4%**
LinkedIn (p<.001)	5,0%	27,7%	29,5%	33,8%	16,8%	10,4%	5,8%	**19,4%**
Twitter (p<.001)	28,5%	29,0%	30,5%	23,6%	14,4%	6,5%	4,6%	**18,6%**
Instagram (p<.001)	66,4%	39,1%	25,4%	13,0%	4,0%	3,1%	0,5%	**17,0%**
Pinterest (p<.001)	25,4%	23,2%	18,0%	15,2%	7,4%	7,8%	1,8%	**12,5%**
Swarm (p<.001)	16,1%	13,4%	6,9%	3,6%	1,1%	0,4%	0,0%	**4,8%**
Foursquare (p<.001)	11,0%	9,8%	6,0%	2,8%	2,1%	0,4%	0,0%	**3,9%**
Tumblr (p<.001)	14,6%	10,8%	2,7%	2,6%	1,2%	0,0%	0,1%	**3,6%**
Reddit (p<.001)	9,6%	7,9%	2,2%	2,3%	0,0%	0,0%	0,0%	**2,5%**
Ello (p=.014)	1,1%	0,1%	1,2%	1,0%	0,0%	0,0%	0,0%	**0,4%**

Table 52: Having an account and having logged in last month on a social network site, breakdown by age (N=2.181).
A p-value of less than .05 indicates a statistically significant difference (using a χ^2-test)
between age groups in having logged in last month.

FREQUENCY OF USING SOCIAL MEDIA

Facebook has the highest usage frequency: 43,8% of the Facebook account owners use it at least one hour a day (+3,9). Instagram also has a loyal and active fanbase, with one in five (20,6%) using it at least one hour a day. For Twitter (12,1%), LinkedIn (2,6%) and Google+ (7,4%) this is far less.



Graph 67: 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 motivations of visiting them.

- Establishing and maintaining personal contact (66,9%), online visibility (42,9%) and killing time (29,7%) are typical reasons for using Facebook. Flemish people tend to use other platforms for establishing professional contacts (4,1%) and searching for a job (0,6%).

- Twitter distinguishes itself from other social networks with the following functions: following other individuals and organisations (38,7%), keeping up with the news (33,9%) and sharing thoughts or opinions (25,3%). Responding to or participating in TV programmes scores higher on Twitter than on other social media. However with 5,5% this is still a less important reason for using it. Searching for a job (1,7%) and sharing (3,5%) and watching (9,0%) content are motivations that are less frequently linked with Twitter.

- LinkedIn still positions itself as the largest professional social network. It will come as no surprise then that the main reasons for creating a LinkedIn account are establishing and maintaining professional contacts (67,1%), and searching for a job (29,5%). The network's score is relatively low for matters linked to entertainment and leisure.

- Like last year, Google+ does not really have motivations in which it stands out or has a disastrously bad performance compared to other networks. Google+ seems to have trouble defining its position in the world of social media. About a quarter of all people with a Google+ account say that online visibility was one of the main reasons for creating an account on this network. Although this is the most frequently cited reason for having a Google+ account, this score is significantly lower than for Facebook (42,9%) and somewhat lower than for LinkedIn.

- Viewing (37,8%) and sharing (31,4%) content are motivations that are typical for using Instagram, even more so than for Facebook. Its score as a medium for killing time is just as high as that of Facebook. Searching for a job (0,2%), responding to a TV programme (0,9%), establishing professional contacts (1,5%) and keeping up with the news (4,2%), meanwhile, are motivations that are rarely linked to Instagram.

MAIN MOTIVES FOR VISITING SOCIAL MEDIA SITES

	FACEBOOK (N= 1.535)	TWITTER (N=663)	LINKEDIN (N=650)	GOOGLE+ (N=982)	INSTAGRAM (N=517)
Online visibility	42,9%	25,5%	29,9%	26,7%	26,1%
To pass time	29,7%	13,7%	2,0%	9,2%	30,3%
To share opinion or thought	19,4%	25,3%	2,9%	4,2%	8,6%
To maintain or set up personal contacts	66,9%	7,9%	15,0%	12,6%	14,4%
To maintain or set up business contacts	4,1%	7,5%	67,1%	6,7%	1,5%
To follow other persons/organisations	31,2%	38,7%	27,9%	11,3%	29,0%
News sources	19,6%	33,9%	4,6%	9,1%	4,2%
To look for a job	0,6%	1,7%	29,5%	3,1%	0,2%
Consuming content (photo, video,...)	25,0%	9,0%	1,0%	13,0%	37,8%
Sharing content (photo, video,...)	11,1%	3,5%	0,4%	5,1%	31,4%
Comment on/follow TV programs	1,0%	5,5%	0,2%	1,7%	0,9%

Table 53: What are the main motivations to have an account on following social media sites?
(on those having an account on that social network site)

OPINION ON SOCIAL MEDIA

- A quarter of all Flemish people with an account on one or more social networks state that they cannot go without using social media for a day (24,9%). This is an increase of 3,1 percentage points compared with 2014.

- The majority of the respondents agree that social media are time-consuming (68,6%) and that they use social media for keeping in touch with acquaintances with whom they would not keep in contact otherwise (73,6%).

- Almost half of all the respondents indicated that they have an account on a social network because their friends also have one (46,7%).

- 41,2% agree that social media are a threat to privacy. A quarter of the respondents (26,4%) do not agree with this statement. Interestingly, one in three respondents gave a neutral answer to this question. This may indicate that the respondents found this question too simplistic and have a more nuanced perception of this issue. Or it may indicate that Flemish users of social media do not really worry about the privacy issue and have no opinion about it.

- Almost three out of ten respondents find that they share more information now on social media than they used to (28,4%) although a great majority do not agree with this statement (57,3%).

- Messages on social media about TV programmes can trigger one in three Flemish people to watch this programme themselves (32,6%).

- Compared with last year, the share of respondents who agree with the premises has increased. The premise “I have an account on social media because others also have an account” posted the highest increase (+16,0 percentage points).

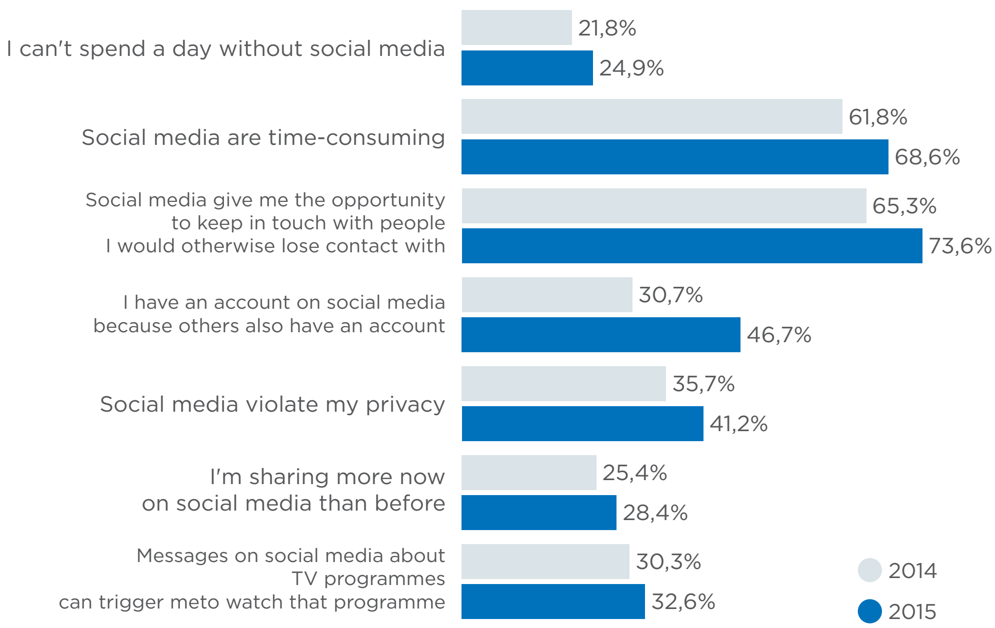
- At the same time, we also note that Flemish people are increasingly struggling with the privacy paradox in 2015. The growing number of Flemish people who are concerned about their privacy on social media (41,2%; +5,5 percentage points) but who also admit that they provide too much information on social media (28,4%; +3,0 percentage points) is in stark contrast with the minority of people who are moving away from devices like laptops, smartphones or tablets for privacy reasons (see the Computer, Telephony and Tablet sections respectively).

OPINION ON SOCIAL MEDIA

	(TOTAL) DISAGREE	NEUTRAL	(TOTAL) AGREE
I can't spend a day without social media	68,2%	6,9%	24,9%
Social media are time-consuming	16,8%	14,6%	68,6%
Social media give me the opportunity to keep in touch with people I would otherwise lose contact with	15,9%	10,5%	73,6%
I have an account on social media because others also have an account	37,4%	15,8%	46,7%
Social media violate my privacy	26,4%	32,4%	41,2%
I'm sharing more now on social media than before	57,3%	14,3%	28,4%
Messages on social media about TV programmes can trigger me to watch that programme	46,4%	21,0%	32,6%

Table 54: Opinions on social media (on people having an account on at least one social media site, N=1.681)

SHARE (TOTALLY) AGREE WITH THE STATEMENTS ABOUT SOCIAL MEDIA - 2014 VS 2015



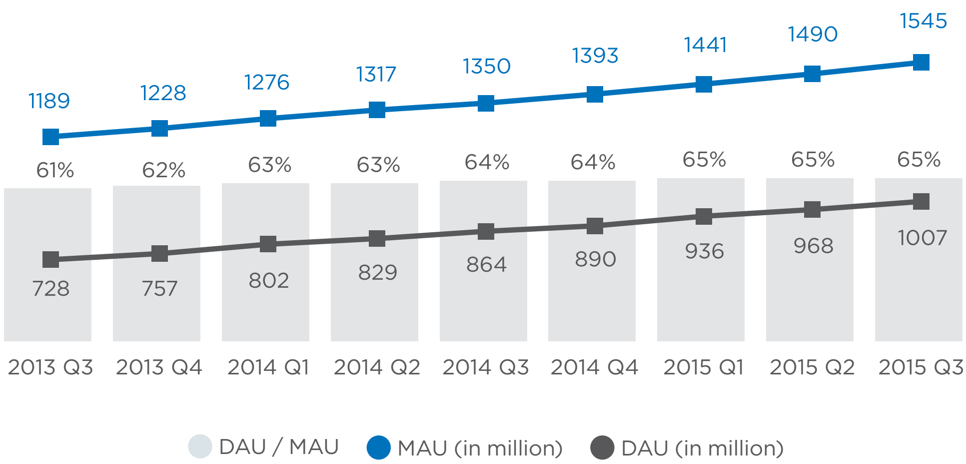
Graph 68: Share of respondents who totally agree or disagree with the statements about social media (on those who have an account on at least one social network; 2015: N=1.681, 2014: N=1.596)

FRAMING THE DATA

FACEBOOK

Facebook remains the most popular and most frequently used social network by far. In the third quarter of 2015, Facebook had 1,54 billion monthly active users worldwide[1]. Two in three of those users visit Facebook every day (65%). From the results of digiMeter 2015, it would appear this ratio is even higher in Flanders: eight in ten of the monthly active Facebook users log in every day.

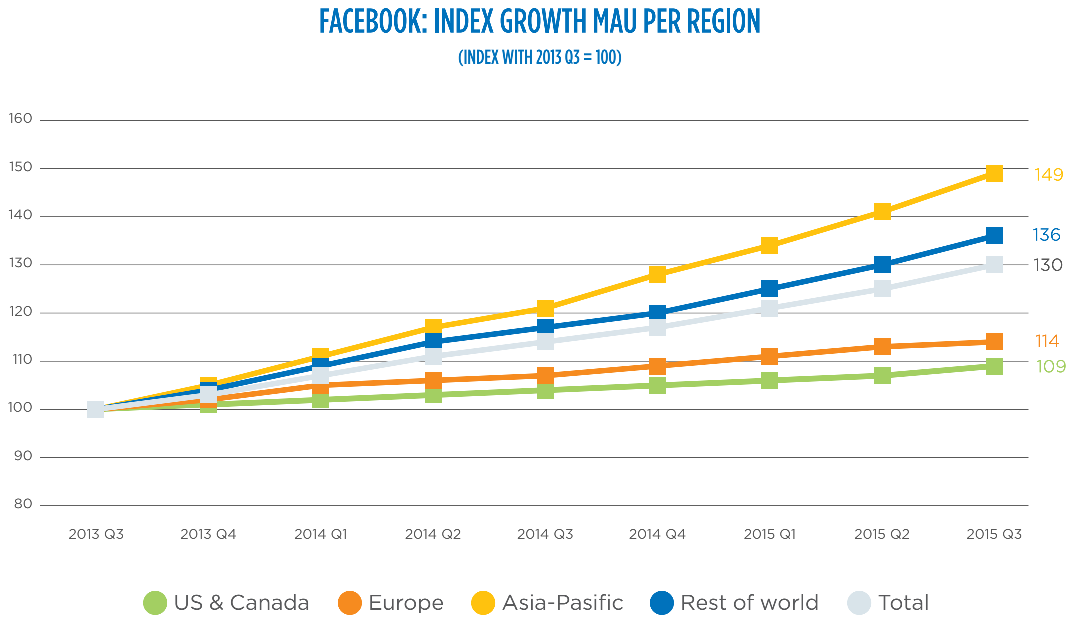
FACEBOOK: MONTHLY ACTIVE USERS (MAU) VERSUS DAILY ACTIVE USERS (DAU)



Graph 69: Facebook: Monthly Active Users (MAU) and Daily Active Users (DAU). Source: Facebook quarterly earnings

Facebook continues its growth in each region, but seems to benefit especially from its strong new markets. Over the past two years, the number of monthly active Facebook users has increased by 30%. The strongest growth took place in Asia-Pacific (+49%) and regions like Latin America, Africa and the Middle East (‘rest of the world’ +36%). In Europe (+14%) and the USA / Canada (+9%), the number of monthly users increased as well, but not as strong as in the other regions. In Flanders, the number of monthly active users increased by 6% in the past two years.

[1] Source: Facebook quarterly earnings (http://bit.ly/FB_QuartRes)



Graph 70: Facebook: Index growth of Monthly Active Users per region (2013 Q3 is set to 100). Source: Facebook quarterly earnings

TWITTER

While Facebook continues to deliver strong quarter-over-quarter growth, Twitter is lagging behind. Its number of monthly users is still growing worldwide, but this growth has been relatively modest. To compare: while 23 million monthly users joined Twitter in a year (third quarter 2014 to third quarter 2015)[2], 195 million monthly users joined Facebook in that same period. In Flanders, the number of monthly Twitter users even declined. In 2014, 21,1% of respondents indicated they had signed in to Twitter in the last month. In 2015, this figure has dropped to 18,6%. This downward trend can be seen in the Netherlands as well. In 2015, 20,0% of the Dutch population (15+) used Twitter, while 23,6% still did so in 2014[3].

These weaker-than-expected user figures put a lot of pressure on Twitter[4]. Instagram, for example, now has 400 million monthly active users[5], quite a bit more than Twitter's 307 million. This led Twitter to change the definition of what 'a monthly active user' is. Since 2015, Twitter is also counting users of the 'SMS Fast Follow' service to calculate their monthly users. With this service, one can follow accounts without needing a Twitter account. It suffices to text a simple instruction to receive updates whenever a followed account tweets. SMS Fast Follow is mainly intended to attract users who don't have a smartphone but do have a GSM. Twitter actually launched the service in the summer of 2010. By counting these users in their number of monthly users, Twitter hopes to boost the metric. In the third quarter of 2015, the text service had 13 million users, almost four times as much as the year before.

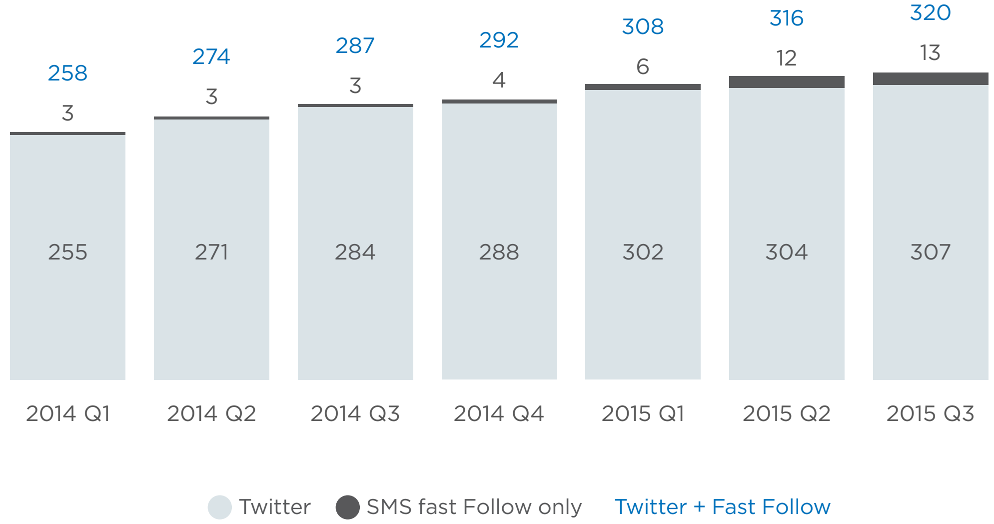
[2] Source: Twitter quarterly results (http://bit.ly/Twitter_QuartRes)

[3] Source: Marketingfacts (based on study by Newcom Research & Consultancy) – "Social media in Nederland 2015: jongeren haken af van Facebook en Twitter" (http://bit.ly/Marketingfacts_SocialMediaNL2015)

[4] Source: Fortune – "What if the Twitter growth everyone is hoping for never comes?" (http://bit.ly/Fortune_Twitter)

[5] Source: CNBC – "Facebook's Instagram hits 400M users, beats Twitter" (http://bit.ly/CNBC_TwitInsta)

TWITTER MONTHLY ACTIVE USERS (MAU): BREAKDOWN BY 'FULL' TWITTER USERS VERSUS SMS FAST FOLLOW USERS -IN MILLION



Graph 71: Twitter Monthly Active Users: 'Full' Twitter users versus SMS Fast Followers (figures in million).
Source: Twitter quarterly results

GOOGLE+

The number of Flemings using Google+ every month is (still) surprisingly high (23,4%). We say surprising because Google+ has often been described as a ghost town[6] nobody is really using. Especially when it was decided that a Google+ account would no longer be mandatory to be able to use other Google services (like YouTube or Google Photos)[7], the end of Google+ seemed near without ever having posed a real threat to Facebook[8].

The Flemish figure for Google+ seems surprising, but is not exceptional at all. In the Netherlands, 27,9% of the population (15+) uses Google+[9] and in the UK, 21% indicates being an active user[10]. Worldwide, 23% of the Internet population uses Google+[11] every month. Latin America has the highest usage (32%). It is remarkable that usage is at its lowest in North America (16%). In Europe, 20% use the social network every month.

[6] Source: The Walls Street Journal – "The mounting minuses at Google+" (http://bit.ly/WSJ_GooglePlus)

[7] Source: Forbes – "Google+ profile no longer required for YouTube" (http://bit.ly/Forbes_GooglePlus)

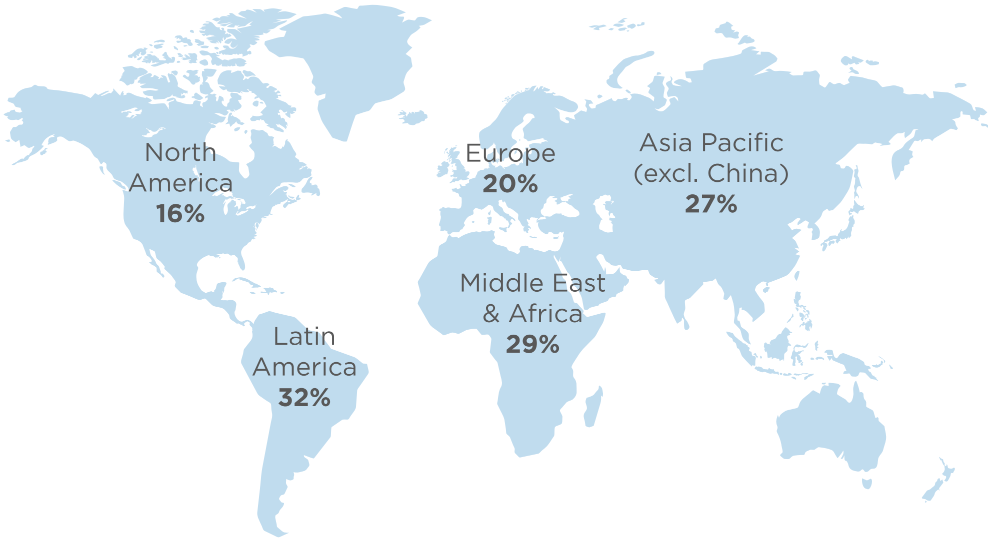
[8] Source: The Daily Beast – "Farewell, Google+, we hardly knew ye" (http://bit.ly/DB_FarewellGooglePlus)

[9] Source: Marketingfacts (based on study by Newcom Research & Consultancy) – "Social media in Nederland 2015: jongeren haken af van Facebook en Twitter" (http://bit.ly/Marketingfacts_SocialMediaNL2015)

[10] Source: Statista – "Membership and active use of Google plus in the United Kingdom (UK) from March 2013 to April 2015" (http://bit.ly/Stat_GooglePlusUK)

[11] Source: GlobalWebIndex – "Google+ Is More Popular Than You Think" (http://bit.ly/GWI_GooglePlus2015)

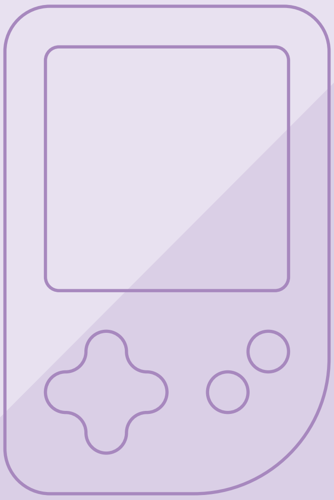
HAVING USED GOOGLE+ IN THE PAST MONTH IN 2015 Q3



Graph 72: Having used Google+ in the past month in 2015 Q3 (% of the Internet population). Source: GlobalWebIndex

CHAPTER 06

GAMES



GAMES

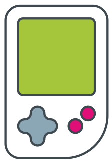
CHAPTER 06

INFOGRAPHIC

GAMING:
Adoption of game consoles remains stable

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

31% FIXED GAME CONSOLE

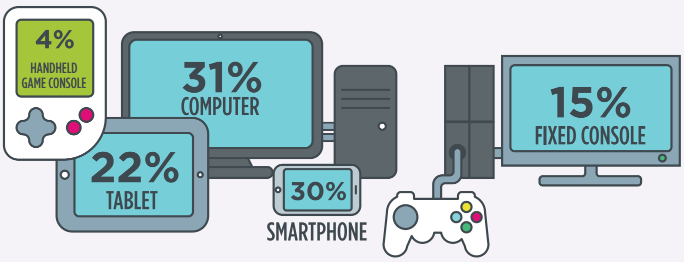


16% HANDHELD GAME CONSOLE

Frequency of gaming

55%

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



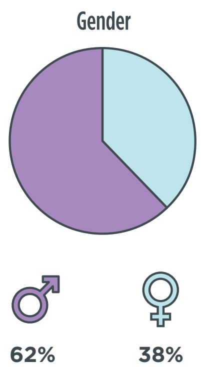
Gamer profile depends on used platform

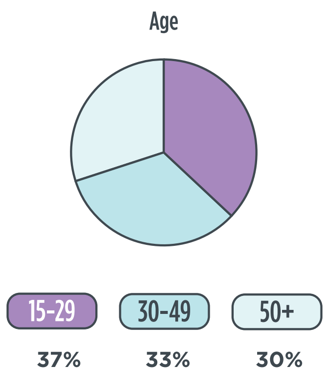
The profile of the Flemish gamer depends on the device on which the game is played: Consoles are mainly used by men younger than 30, computers are more evenly distributed on gender and age, mobile phones are mainly used by people younger than 50, and tablets mainly by 30-49 year olds.

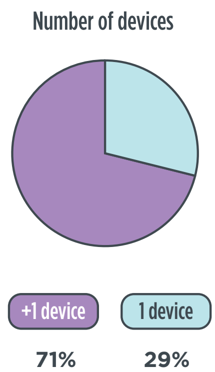
	♂	♀	15 -29	30-49	50+
Fixed game console	67%	33%	51%	40%	9%
Handheld game console	60%	40%	56%	29%	16%
Computer	53%	47%	32%	31%	38%
Smartphone/GSM	49%	51%	41%	42%	17%
Tablet	47%	53%	24%	42%	34%

24%

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







GENERAL FACTS & FIGURES (N=2.181)

55,1%

played a digital game in the past month. The most frequently used devices for gaming are the computer (31,2%), the mobile phone (30,4%) and the tablet (22,3%).

One in three respondents (33,5%) have a game console at home.

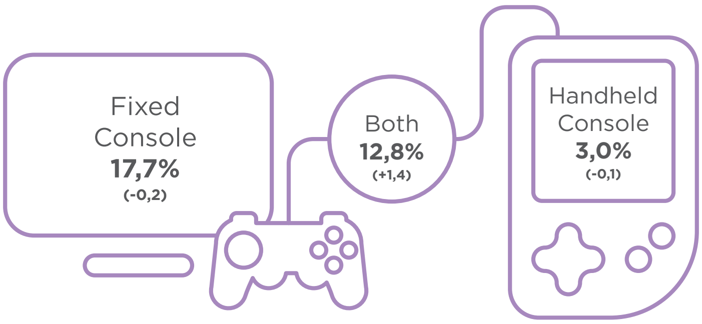
30,5%(+1,1)	15,8%(+1,3)	12,8%(+1,4)
Fixed console (connected to TV screen)	Handheld console	Both

GAME CONSOLES

- One in three respondents (33,5%) have a game console at home. Like last year, there is a slight increase in the adoption of game consoles. In 2014, this increase amounted to 1,7 percentage points; this year it is 1,0 percentage point.
- 55,1% played a digital game in the past month. The most frequently used devices for gaming are the computer (31,2%), the mobile phone (30,4%) and the tablet (22,3%).

FIXED CONSOLES VERSUS HANDHELD CONSOLES

Total adoption game consoles: **33,5%**(+1,0)



Graph 73: Adoption of fixed consoles versus handheld consoles (N=2.181)

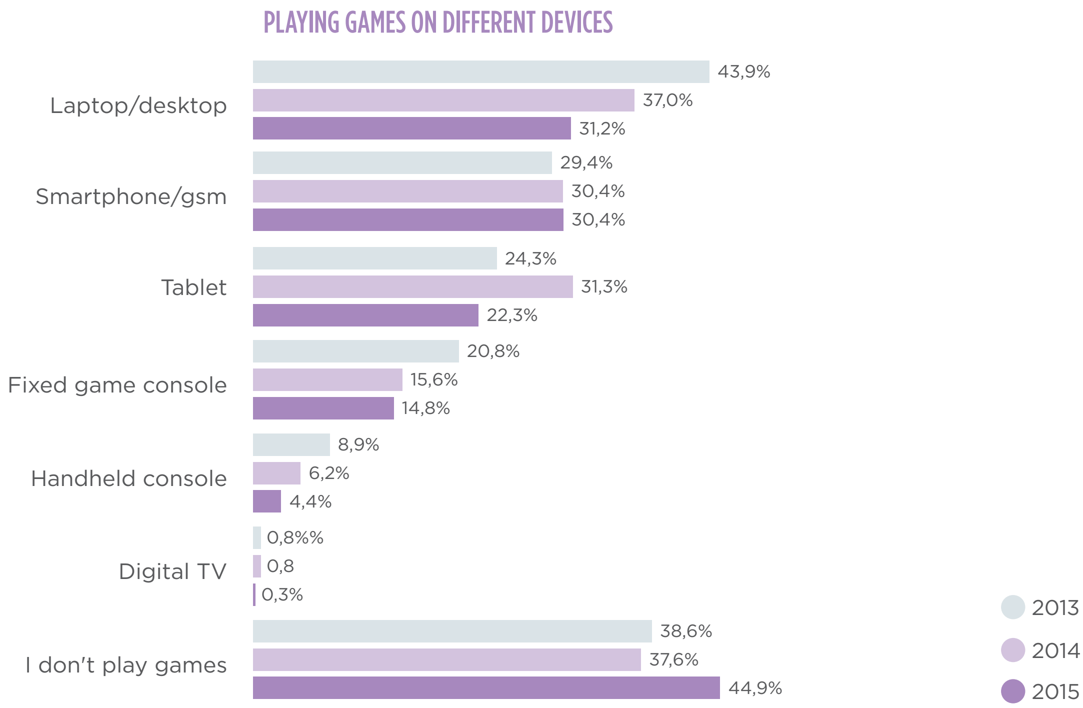
PLAYING GAMES ON DIFFERENT DEVICES

- Over half of the respondents say they have played a game on a digital device in the past month (55,1%). This is a considerable decrease (-7,3 percentage points compared with last year). This is mainly due to a marked drop in gaming on tablets (-9,0 percentage points). Last year, the tablet experienced the strongest growth as a gaming device (+7,0). This turnaround ties in with the diminished popularity of the tablet in general. Both the growth in adoption and daily use have dropped sharply (see chapter Tablet).

- Most other devices also seem to be used less frequently this year as a gaming device. In addition to the drop for tablets, the use of computers for gaming also fell sharply (-5,8). With a figure of 31,2% who have played a game on a computer in the past month, this device has managed to just hold on to first place. Likewise, the mobile phone has maintained a status quo (30,4%). The fixed game console (-0,8) remained more or less stable at around 15%, whereas the portable game console has seen a slight drop (-1,8), falling below the threshold of 5%.

PLAYING GAMES

GAMES



Graph 74: On which devices did you play a game during the last month? (2015: N=2.181, 2014: N=2.028, 2013: N=3.519)

PROFILING GAMERS (N=1.202)

- Whereas the gender difference between gamers and non-gamers has gradually disappeared, age still has a significant effect. In the category of 15 to 29-year olds, eight out of ten respondents had played games in the past month. This figure is about 6 out of 10 in the category of 20 to 49-year olds, 4 out of 10 among 50 to 64-year olds and 3 out of 10 in the 65+ category.

- In view of this age effect, it is no surprise then that gamers are especially strongly represented among students (index: 150) and people living with one parent (index: 150) or both parents (index: 157).

- There is a clear difference in profile if we look for each type of device at who played games in the past month. In the case of the fixed game console the profile matches the most stereotypical idea of the typical gamer: mainly men, and generally younger than 30 (with a peak in the category of 15 to 19-year olds). For gaming on the computer this profile is more even. The number of men and women who played a game on the computer in the past month is almost the same. The age differences are also less pronounced in this category, compared with the fixed game console, but it is still clear that gaming on a computer is more prevalent among 15 to 19-year olds (50,8%) than those over 65 (23,6%). There is a strong age difference for gaming on a mobile phone, but the gender balance is more evenly distributed. Gaming on a tablet is the exception. Women tend to play more games on a tablet than men and a quarter of those who play a game every month on the tablet are between 40 and 49 years old (making that the profile is somewhat older than for gaming on other devices).

PROFILING OF THOSE WHO HAVE GAMED ON ANY DEVICE IN THE PAST MONTH

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION[1]
Gender			
Men	56,5%	50,3%	**103**
Women	53,8%	49,7%	**97**
Age			
15-19	85,2%	10,1%	**153**
20-29	81,8%	21,2%	**148**
30-39	66,5%	18,1%	**121**
40-49	61,0%	18,6%	**111**
50-59	43,9%	13,7%	**80**
60-64	39,7%	5,2%	**72**
65+	31,3%	13,1%	**57**
Degree			
No degree or primary education	30,0%	8,1%	**54**
Lower secondary education	57,1%	20,4%	**104**
Higher secondary education	59,3%	38,9%	**107**
Bachelor degree	61,8%	18,0%	**113**
Master or post-university degree	60,9%	14,5%	**110**

[1] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 10,1% of those who played games in the past month are between the ages of 15 and 19 years old. This profile constitutes 6,6% of the population of Flanders aged 15 or more. The result is an index of 153, and indicates that 15 to 19-year olds are overrepresented among gamers.

GAMES

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION[1]
Household situation			
Single without children	44,1%	15,7%	**80**
Single with child(ren)	67,1%	5,9%	**123**
Married/living together without children	46,7%	24,7%	**85**
Married/living together with child(ren)	51,7%	26,0%	**94**
Living with both parents	82,6%	17,2%	**150**
Living with one parent	87,5%	8,8%	**157**
Living with others	53,7%	1,8%	**100**
Household members			
1	44,0%	15,5%	**80**
2	49,2%	31,2%	**89**
3	66,0%	20,6%	**120**
4	61,6%	22,4%	**112**
5	68,7%	7,8%	**126**
6	63,8%	2,2%	**116**
> 6	57,2%	0,4%	**100**
Occupation			
Student	83,2%	20,6%	**150**
Blue-collar worker	66,4%	9,5%	**120**
White-collar worker	60,8%	27,4%	**110**
Public servant/teacher	56,2%	9,8%	**102**
C-level (e.g.., CEO, CFO,...)	58,0%	1,2%	**109**
Self-employed	31,4%	2,6%	**57**
Liberal profession	62,0%	0,4%	**133**
Houseman/-wife	47,2%	2,0%	**83**
Unemployed	58,7%	8,6%	**106**
Retired	35,6%	17,6%	**64**
Other	61,3%	0,3%	**100**

[1] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 10,1% of those who played games in the past month are between the ages of 15 and 19 years old. This profile constitutes 6,6% of the population of Flanders aged 15 or more. The result is an index of 153, and indicates that 15 to 19-year olds are overrepresented among gamers.

	LEVEL OF ADOPTION	PROFILE	INDEX PROFILE COMPARED WITH POPULATION[1]
Net income			
< €1.000	47,2%	2,0%	**83**
€1.000 - €1.500	38,8%	6,5%	**71**
€1.501 - €2.000	59,9%	13,5%	**109**
€2.001 - €3.000	60,2%	15,3%	**109**
€3.001 - €4.000	59,3%	16,9%	**107**
€4.001 - €5.000	55,2%	8,3%	**100**
> €5.000	61,2%	5,9%	**111**
Don't know	71,0%	16,5%	**129**
Prefer not to say	41,8%	15,1%	**76**

Profiling of those who have gamed on any device in the past month (N=1.202)

BREAKDOWN BY GENDER FOR MONTHLY GAMING ON:

FIXED GAME CONSOLE	MEN	WOMEN	TOTAL
Gender profile	66,8%	33,2%	**100,0%**
Result by gender	20,1%	9,6%	**14,8%**
PORTABLE GAME CONSOLE			
Gender profile	60,4%	39,6%	**100,0%**
Result by gender	5,4%	3,4%	**4,4%**
LAPTOP/DESKTOP			
Gender profile	53,2%	46,8%	**100,0%**
Result by gender	33,9%	28,7%	**31,2%**
MOBILE PHONE			
Gender profile	49,4%	50,6%	**100,0%**
Result by gender	30,7%	30,2%	**30,4%**
TABLET			
Gender profile	47,1%	52,9%	**100,0%**
Result by gender	21,4%	23,1%	**22,3%**

Table 55: Breakdown by gender for monthly gaming on different devices (N=2.181).

[1] The index is a measurement of over or underrepresentation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 10,1% of those who played games in the past month are between the ages of 15 and 19 years old. This profile constitutes 6,6% of the population of Flanders aged 15 or more. The result is an index of 153, and indicates that 15 to 19-year olds are overrepresented among gamers.

BREAKDOWN BY AGE FOR MONTHLY GAMING ON:

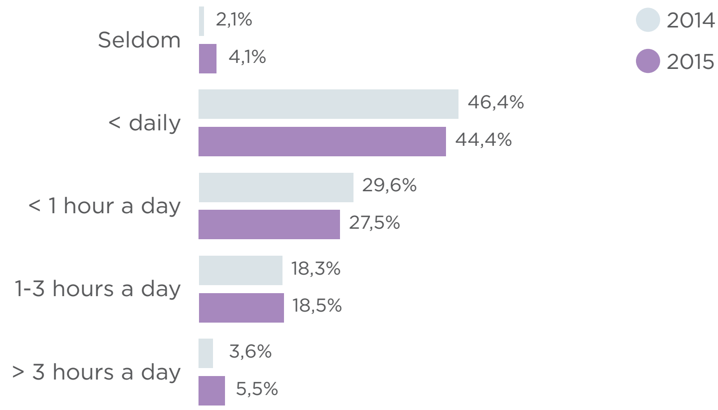
FIXED GAME CONSOLE	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	19,3%	32,0%	20,1%	19,7%	4,6%	0,1%	4,2%	**100,0%**
Result by age	43,4%	33,1%	19,8%	17,4%	3,9%	0,3%	2,7%	**14,8%**
PORTABLE GAME CONSOLE								
Age profile	19,1%	36,5%	19,8%	9,0%	7,2%	3,8%	4,7%	**100,0%**
Result by age	12,9%	11,3%	5,8%	2,4%	1,8%	2,3%	0,9%	**4,4%**
LAPTOP/DESKTOP								
Age profile	10,7%	21,1%	18,2%	12,6%	14,5%	5,7%	17,3%	**100,0%**
Result by age	50,8%	46,3%	37,8%	23,4%	26,3%	24,6%	23,6%	**31,2%**
MOBILE PHONE								
Age profile	13,9%	27,0%	21,8%	20,4%	7,6%	2,8%	6,4%	**100,0%**
Result by age	64,4%	57,6%	44,2%	37,1%	13,4%	11,8%	8,5%	**30,4%**
TABLET								
Age profile	8,4%	16,0%	17,9%	24,1%	18,5%	5,9%	9,1%	**100,0%**
Result by age	28,4%	25,0%	26,6%	32,1%	24,0%	18,3%	8,9%	**22,3%**

Table 56: Breakdown by age for monthly gaming on different devices (N=2.181).

FREQUENCY OF PLAYING GAMES

- Almost half of those who play games play less than daily (48,5%).
- We previously saw there has been a drop in monthly digital gaming. It is worth noting that the group of passionate gamers who spend at least one hour a day playing games is still on the increase. Last year, 21,9% spent at least one hour a day gaming. This year, this figure has increased to 24,0% (+2,1 percentage points).

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



Graph 75: Frequency of playing games (on people who have played games last month; 2015: N=1.202, 2014: N=1.266)

PROFILING HEAVY GAMERS

- Within the population of gamers (i.e., anyone who played a game in the last month), 24,0% indicated that that they game at least one hour a day ("heavy gamers").
- It is worth noting that there is still a gender effect in this category, with a stronger representation of men (62,0%) than women (38,0%).
- Age is a less defining factor in the category of heavy gamers than in the overall game population. The level of adoption is the highest in the under-30s, but the difference with the other age groups is less pronounced.
- Not only do heavy gamers spend more time gaming (at least one hour a day), they also tend to use multiple devices to play games on. Almost 7 out of 10 heavy gamers used at least two different devices for gaming in the past month (the most common devices being computer and smartphone). This figure is 47,7% for those who game less than one hour a day. If we look at each device separately, usage is always higher for heavy gamers. The exception to this rule is the tablet. The use of the tablet as a game platform is just as high for light gamers as for heavy gamers (both 40,5%).

HEAVY GAMERS (AT LEAST ONE HOUR OF GAMING A DAY): BREAKDOWN BY GENDER

	MEN	WOMEN	TOTAL
Gender profile	62,0%	38,0%	**100,0%**
Level of adoption by gender	29,6%	18,3%	**24,0%**

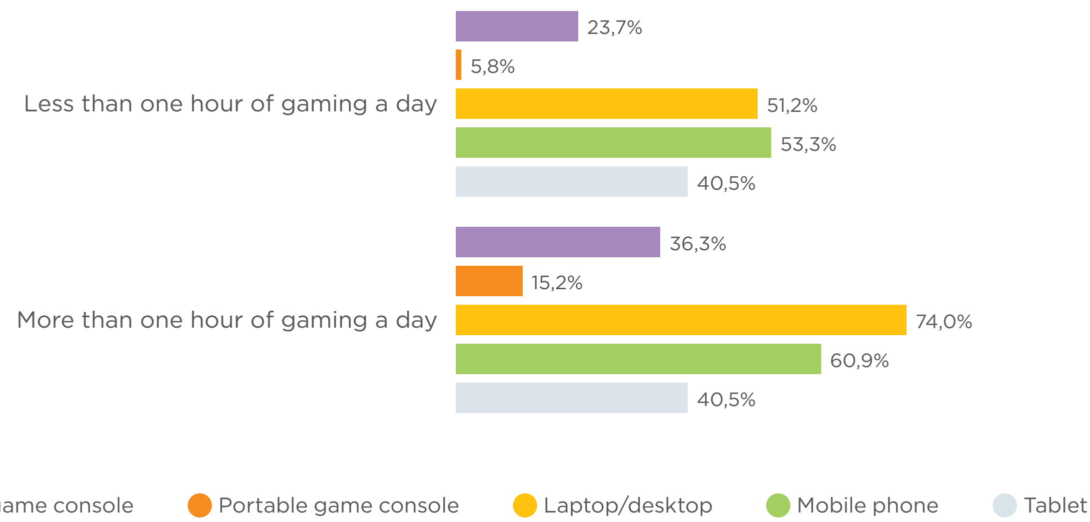
Table 57: Breakdown by gender for gaming at least one hour a day
(within people who have played a digital game during the last month; N=1.202)

HEAVY GAMERS (AT LEAST ONE HOUR OF GAMING A DAY): BREAKDOWN BY AGE

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	11,6%	25,4%	18,2%	14,7%	12,2%	5,4%	12,5%	**100,0%**
Level of adoption by age	27,5%	28,7%	24,2%	19,0%	21,3%	24,8%	23,0%	**24,0%**

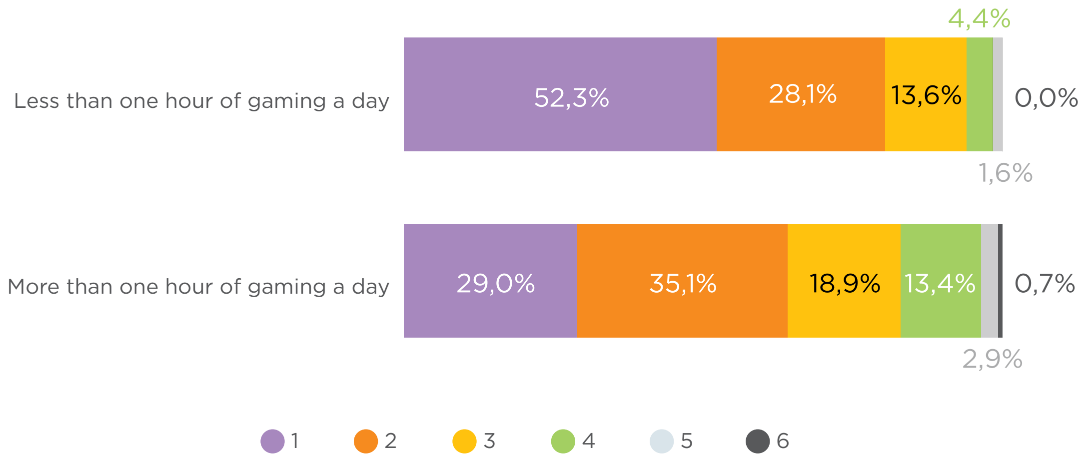
Table 58: Breakdown by age for gaming at least one hour a day
(within people who have played a digital game during the last month; N=1.202)

USE OF DEVICES: HEAVY GAMERS VS. LIGHT GAMERS



Graph 76: On which device did you play a game in the past month - Split between “Heavy gamers” (at least one hour a day) and “Light gamers” (less than one hour a day) (among those who played a game in the past month; N= 1.202)

NUMBER OF DEVICES USED FOR GAMING: HEAVY GAMERS VS. LIGHT GAMERS



Graph 77: Count for the question "on which device did you play a game in the past month?" - Split between "Heavy gamers" (at least one hour a day) and "Light gamers" (less than one hour a day) (among those who played a game in the past month; N= 1.202)

FRAMING THE DATA

digiMeter indicates that gaming is gender neutral in Flanders: the Flemish gaming population (i.e. those who played a digital game at least once in the last month) consists of almost the same amount of men (50,3%) and women (49,7%). There are however gender differences when we look at gaming platforms. Women and men are represented equally for games played one mobile devices like mobile phones or tablets (51% of those who played a game on a mobile phone in the last month are women; for tablets, this is 53%), but gaming on a computer shows slightly more men (53%) than women (47%), and dedicated game consoles still have a strong male profile (60% of those who played a game on a handheld game console in the last month are men; for fixed game consoles even 67%).

In other countries we also see that women are strongly represented among mobile gamers, while gamers on game consoles are still mainly men. In the UK, women represent 55% of the weekly gamers on mobile devices (mobile phones and tablets).[1] Among weekly desktop gamers, 42% are women, and among fixed console players only 25%.

In the US, the gaming population is 56%[2] male, while mobile gaming is predominantly female.[3] There are gender differences between different gaming genres as well.[4] Players of action and strategy games respectively consist of 25% and 32% women, while there are 61% women for social casino games and even 82% for puzzle games. Looking deeper into it, we see that the proportion of female gamers ranges from 8% (fantasy sports) to 89% (hidden objects).

[1] Source: Ofcom – "The Communications Market Report – UK edition - 2015" (http://bit.ly/Ofcom_CMR_UK_2015)

[2] Source: Entertainment Software Association - "Essential facts about the computer and video game industry 2015" (http://bit.ly/ESA_EssFactsGaming2015)

[3] Source: RealityMine - "Myth busting: Mobile Gaming demographics" (http://bit.ly/RM_MobileGamingDemo)

[4] Source: DeltaDNA – "Gender split in F2P games: Who's playing what" (http://bit.ly/DeltaDNA_GenderSplitGaming)

PROFILING GAMERS BY GAME GENRE AND SUBGENRE

GENRE	MALE	FEMALE
Action	75%	25%
Strategy	68%	32%
Puzzle	18%	82%
Social Casino	39%	61%

SUBGENRE	MALE	FEMALE
First person shooter	90%	10%
Infinite (or endless) runner	52%	48%
Role playing game	78%	22%
Builder style strategy	61%	39%
Match three games	22%	78%
Hidden object	11%	89%
Poker	68%	32%
Fantasy sports	92%	8%
Social slots	38%	62%

Table 59: Profiling gamers by game genre and subgenre (source: DeltaDNA)

GAMES

GAME CONSOLES: PS4 MOST POPULAR CONSOLE BY FAR

When we bring in the global sales figures of the latest-generation consoles (PlayStation 4, Xbox One and Wii U), we notice that the PlayStation 4 is by far the best-sold device.[5] Between its launch and October 2015, nearly 27 million units have been sold worldwide. That is almost twice the number of sold Xbox One consoles (15 million). The Wii U is stuck at nearly 11 million units. In Europe, the PS4 predominance is even clearer[6]: six out of ten consoles sold in Europe are PlayStation 4s.

LIFETIME THROUGH OCTOBER 2015: SALES FIGURES OF 8TH-GENERATION CONSOLES. GLOBAL VS EUROPE

GLOBAL SALES: LIFETIME THROUGH OCTOBER 2015	SALES	SHARE
PlayStation 4	27.684.836	52%
Xbox One	15.078.055	28%
Wii U	10.725.138	20%

EUROPE SALES: LIFETIME THROUGH OCTOBER 2015	SALES	SHARE
PlayStation 4	10.743.771	62%
Xbox One	4.025.348	23%
Wii U	2.519.339	15%

Table 60: Lifetime through October 2015: Sales figures of 8th-generation consoles. Global vs Europe (source: VGchartz)

Compared to the previous generation of consoles, PlayStation 4 and Xbox One are doing very well.[7] Combined, they sold over 40,9 million of their eighth-generation devices in the 23 months since they were launched, over 13,5 million units more than the number of previous-generation PlayStation and Xbox consoles in their 23 first months.

We find a very different evolution at Nintendo, where the Wii U seems to buckle under the popularity of the previous Wii console.[8] In the 34 months since the launch of Wii U, only 10,3 million consoles were sold, a whopping 42,7 million less than the Wii's seventh-generation console in the same time span.

[5] Source: VGchartz – "PS4 vs Xbox One vs Wii U Global lifetime sales – October 2015 update" (http://bit.ly/VGchartz_Oct2015_ConsGlobal). Note: 'Lifetime' depicts that figures are since launch of the console.

[6] Source: VGchartz - "PS4 vs Xbox One vs Wii U Europe lifetime sales – October 2015 update" (http://bit.ly/VGchartz_Oct2015_ConsEurope)

[7] Source: VGchartz – "PS4 and Xbox One vs PS3 and Xbox 360 - Aligned sales comparison - September 2015 update" (http://bit.ly/VGchartz_GenConsPSXboxSept2015)

[8] Source: VGchartz – "Wii U vs Wii – VGChartz Gap Charts – August 2015 Update" (http://bit.ly/VGchartz_GenConsWiiAug2015)

GLOBAL SALES: 7TH VERSUS 8TH GENERATION CONSOLES - ALIGNED LAUNCH (SOURCE: VGCHARTZ)

GLOBAL SALES: 7TH VERSUS 8TH GENERATION - FIRST 23 MONTHS

PS3 + Xbox360	27.438.442
PS4 + Xbox One	40.939.894
Total lead 8th generation	**13.501.452**

GLOBAL SALES: 7TH VERSUS 8TH GENERATION - FIRST 34 MONTHS

Wii	52.985.717
Wii U	10.281.251
Total lead 7th generation	**42.704.466**

Table 61: Global sales: 7th versus 8th generation consoles - Aligned launch (Source: VGchartz)

CHAPTER 07

TRADITIONAL MEDIA

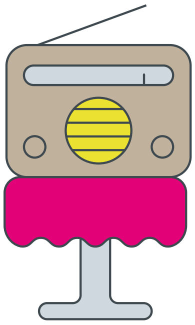
TRADITIONAL MEDIA

CHAPTER 07

INFOGRAPHIC

TRADITIONAL MEDIA: Radio, music and news

Radio



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

Car radio	Radio set at home	Internet radio	DAB radio set
51% daily	**50%** daily	**10%** daily	**3%** daily

Online music

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

YouTube
45% of the Flemish population uses YouTube to stream music

Spotify
25% of the Flemish population uses Spotify

25% of those users has a paid account

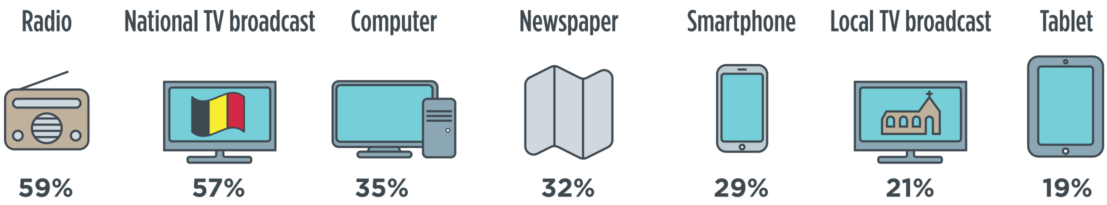
iTunes
24% of the Flemish people uses iTunes

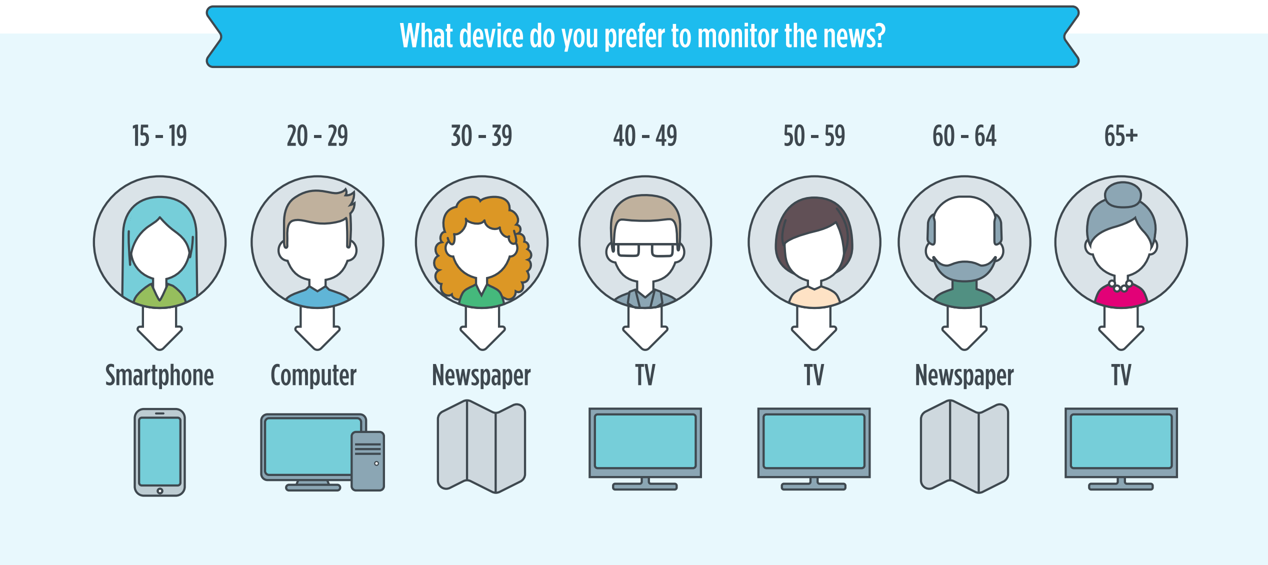
66% of those users has paid for music on this platform

Apple Music
4% of the Flemish population uses Apple Music

News

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





RADIO

- Every day, 50,6% of Flemish people listen to the radio in their car and 49,8% listen to a radio at home.
- Almost 3 out of 10 respondents listen to Internet radio every month.
- DAB radio[1] has clearly not yet established its place in Flanders. Only 10,2% report that they have ever used a DAB device for listening to the radio.
- In total, around 3 out of 4 Flemish people say they listen to the radio daily, through at least one of the listed channels. Almost 9 out of 10 (88,2%) respondents say they listen to the radio monthly.

LISTENING TO RADIO THROUGH DIFFERENT DEVICES

	EVER	MONTHLY	DAILY	EVOLUTION DAILY 2015-2014
Car radio	81,1%	72,8%	50,6%	-2,9
Radio at home	80,6%	66,9%	49,8%	-1,3
Internet radio	51,3%	28,1%	10,1%	+0,0
DAB radio[1]	10,2%	5,5%	3,3%	N/A
Any of the above	92,5%	88,2%	73,9%	N/A

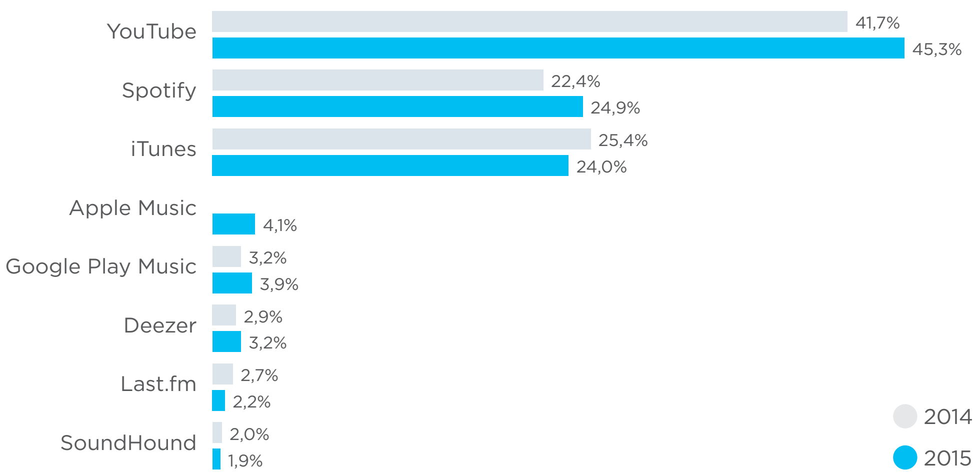
Table 62: Frequency of using different devices to listen to radio (N=2.181)

[1] DAB radio (Digital Audio Broadcasting) is a device that can receive digital radio broadcasts and is an alternative to the traditional analogue radio (which uses FM radio waves for example).

MUSIC

- 59,5% (+3,2) of the Flemish population report that they have consumed online music in the last month.
- YouTube is still the most popular online source of music by far (45,3%).
- Apple Music was launched this past summer. A few months later[2], 4,1% say they use this service[3].
- Men and people in younger age categories are more likely to use online music channels.
- Less than one in four (22,1%) report that they also pay for online music on the suggested music channels (either buying music or having a paid subscription). This is roughly the same as last year, when 22,6% reported paying for online music.
- When people pay for online music, it is most likely via iTunes (15,9% of the population).
- Men (25,3%) pay for online music more frequently than women (19,0%). Almost three out of ten respondents under 50 say they have paid for online music.

USING DIFFERENT ONLINE MUSIC CHANNELS



Graph 78: Using different online music channels in last month (N=2.181)

[2]The field work for digiMeter was carried out in August and September.
[3]We cannot exclude the possibility of confusion between iTunes and Apple Music, as they are both music services offered by Apple.

BREAKDOWN BY GENDER FOR USING ONLINE MUSIC CHANNELS

	MEN	WOMEN	TOTAL
Gender profile	54,9%	45,1%	**100,0%**
Level of adoption by gender	66,7%	52,6%	**59,5%**

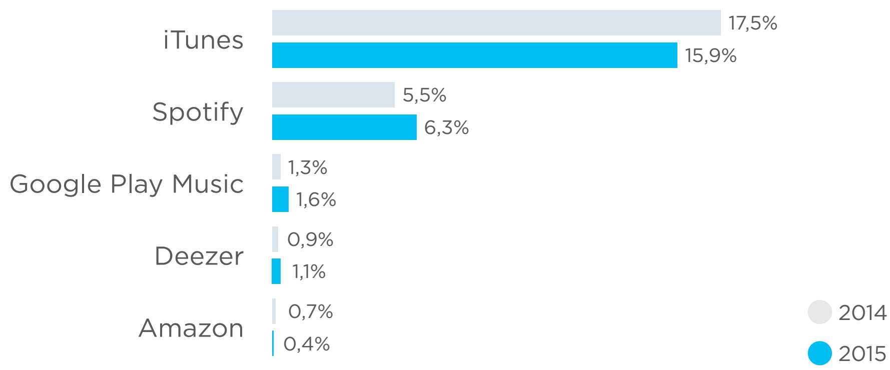
Table 63: Breakdown by gender for using any of the enlisted online music channels (N= 2.181)

BREAKDOWN BY AGE FOR USING ONLINE MUSIC CHANNELS

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	10,5%	21,8%	19,9%	19,8%	14,2%	4,6%	9,2%	**100,0%**
Level of adoption by age	95,2%	90,9%	78,9%	70,0%	49,1%	37,7%	24,0%	**59,5%**

Table 64: Breakdown by age for using any of the enlisted online music channels (N= 2.181)

PAYING FOR MUSIC ON DIFFERENT ONLINE MUSIC CHANNELS



Graph 79: Paying for music on different online music channels (N=2.181)

BREAKDOWN BY GENDER FOR PAYING FOR ONLINE MUSIC

	MEN	WOMEN	TOTAL
Gender profile	56,1%	43,9%	**100,0%**
Level of adoption by gender	25,3%	19,0%	**22,1%**

Table 65: Breakdown by gender for having paid for any of the enlisted online music channels (N= 2.181)

BREAKDOWN BY AGE FOR PAYING FOR ONLINE MUSIC

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	10,9%	19,8%	23,0%	25,7%	14,0%	3,0%	3,8%	**100,0%**
Level of adoption by age	36,6%	30,7%	33,9%	33,9%	17,9%	9,1%	3,7%	**22,1%**

Table 66: Breakdown by age for having paid for any of the enlisted online music channels (N= 2.181)

NEWS

- Radio (58,9%), national television (56,8%) and the computer (35,2%) are the sources most commonly used on a daily basis to consume news.

- The strong increase in usage of a smartphone on a daily basis for monitoring the news (+5,0 percentage points compared with last year) is striking. The daily use of the tablet as a news source has declined (-4,0), which is in line with a general decline in the use of the tablet (see chapter Tablet).

- Keeping up with current affairs through more traditional channels such as radio, national TV, computer and printed newspapers is a daily routine for an ever-decreasing number of respondents[4]. The majority of Flemish people say they still use these channels on a monthly basis to check the news.

- Regional TV as a daily news source is more popular among women (23,7%) than among men (18,5%). The other news sources (radio, national TV, computer, printed newspaper, smartphone and tablet) have a higher daily usage rate among men than women.

- The devices used for news consumption are linked to age. For the news media listed, we noticed a correlation with the following age categories:

    - News on radio: 40 years and older
    - News on national TV: 50 years and older
    - News on computer: 20-49 years old
    - Newspaper: 50 years and older
    - News on smartphone: younger than 50
    - News on regional TV: 60 years and older
    - News on tablet: 40-64 years old

- Thus the smartphone is the only climber in terms of news consumption. The traditional radio and TV channels continue to dominate, although they have lost some ground, just like the tablet. The smartphone, meanwhile, has increased by 5 percent points as a daily news source. For three out of ten Flemish people, it has become a daily news source, becoming just as important as printed newspapers on a daily basis. In contrast to many other emerging mobile habits, it is not limited to young people in the case of news consumption. The rise of mobile news consumption on a smartphone is evident across all age categories under 50. People mainly seem to read news on a personal device, and less on a shared device. The shared printed newspaper has seen a decline, but so has the shared digital device such as the tablet. Only the group that consider the tablet a personal device (the 40-65-year olds, see chapter Tablet) have developed a very clear habit of checking the news daily on their tablets. This is much less the case in families with children.

[4]Likewise, here, we must remind readers that these figures only represent respondents' perception of how often they think they use these channels for checking the news. In other words, we are measuring the perception of news consumption among the Flemish population, not the actual reach of each individual news medium.

- If we look into detail at the digital news sources, visiting news sites is most popular (68,9% have visited a news website last month), mainly by means of a computer. With the exception of when reading a digital newspaper, the smartphone has a higher user base than the tablet. Personalised news apps (such as Flipboard, Feedly, Zite) are not that common yet, as only 8,8% have used one during the last month.

- If we ask respondents about their preferred medium for checking the news, then the more traditional channels such as TV (25,2%) and the printed newspaper (22,2%) are most frequently cited. There are clear differences between the age categories however. The smartphone is the most preferred device by far (31,1%) in the category of 15 to 19-year olds. The computer (19,8%) and the printed newspaper (18,9%) had the highest scores in the category of 20 to 29-year olds. From the age of 40 upwards, the TV screen and the printed newspaper are by far the preferred means of monitoring the news.

DIFFERENT SOURCES FOR FOLLOWING THE NEWS

	EVER	MONTHLY	DAILY	EVOLUTION DAILY (2015-2014)
Radio	85,0%	74,6%	58,9%	**-6,9**
National TV	85,1%	77,5%	56,8%	**-3,3**
Laptop/desktop	69,6%	58,6%	35,2%	**-5,6**
Printed newspaper	77,9%	55,1%	31,5%	**-5,9**
Smartphone	54,3%	44,5%	29,3%	**+5,0**
Regional TV	70,3%	43,8%	21,1%	**+0,3**
Tablet	45,9%	35,3%	19,3%	**-4,0**

Table 67: Different sources for following the news (N=2.181).

BREAKDOWN BY GENDER FOR DAILY NEWS CONSUMPTION ON:

RADIO	MEN	WOMEN	TOTAL
Gender profile	50,4%	49,6%	**100,0%**
Level of adoption by gender	60,6%	57,4%	**58,9%**
NATIONAL TV			
Gender profile	50,9%	49,1%	**100,0%**
Level of adoption by gender	59,0%	54,8%	**56,8%**
LAPTOP/DESKTOP			
Gender profile	65,8%	34,2%	**100,0%**
Level of adoption by gender	44,3%	25,3%	**35,2%**
PRINTED NEWSPAPER			
Gender profile	54,8%	45,2%	**100,0%**
Level of adoption by gender	35,3%	28,0%	**31,5%**
SMARTPHONE			
Gender profile	57,5%	42,5%	**100,0%**
Level of adoption by gender	34,4%	24,4%	**29,3%**
REGIONAL TV			
Gender profile	42,9%	57,1%	**100,0%**
Level of adoption by gender	18,5%	23,7%	**21,1%**
TABLET			
Gender profile	54,2%	45,8%	**100,0%**
Level of adoption by gender	21,4%	17,4%	**19,3%**

Table 69: Breakdown by gender for daily news consumption through different channels (N=2.181).

BREAKDOWN BY AGE FOR DAILY NEWS CONSUMPTION ON:

RADIO	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	3,0%	9,6%	13,6%	20,8%	17,6%	8,7%	26,7%	**100,0%**
Level of adoption by age	26,7%	39,5%	53,5%	73,0%	60,1%	71,6%	68,7%	**58,9%**
NATIONAL TV								
Age profile	2,7%	6,8%	8,9%	17,3%	20,9%	11,8%	31,6%	**100,0%**
Level of adoption by age	23,3%	27,3%	33,7%	58,6%	68,9%	92,9%	78,3%	**56,8%**
LAPTOP/DESKTOP								
Age profile	5,8%	19,2%	17,2%	19,8%	17,4%	8,0%	12,6%	**100,0%**
Level of adoption by age	28,3%	43,6%	40,2%	40,0%	32,2%	47,3%	22,5%	**35,2%**
PRINTED NEWSPAPER								
Age profile	2,3%	6,6%	8,8%	15,3%	19,2%	12,6%	35,1%	**100,0%**
Level of adoption by age	11,2%	14,5%	18,4%	28,8%	35,2%	55,4%	48,3%	**31,5%**
SMARTPHONE								
Age profile	8,8%	22,7%	22,2%	22,8%	14,0%	3,4%	6,0%	**100,0%**
Level of adoption by age	39,4%	46,6%	43,3%	39,8%	23,8%	13,8%	7,7%	**29,3%**
REGIONAL TV								
Age profile	3,0%	3,1%	6,7%	14,7%	17,7%	11,9%	42,9%	**100,0%**
Level of adoption by age	9,5%	4,5%	9,4%	18,5%	21,7%	35,0%	39,6%	**21,1%**
TABLET								
Age profile	4,5%	10,9%	16,7%	26,3%	21,9%	10,4%	9,3%	**100,0%**
Level of adoption by age	13,2%	14,8%	21,5%	30,4%	24,6%	27,8%	7,8%	**19,3%**

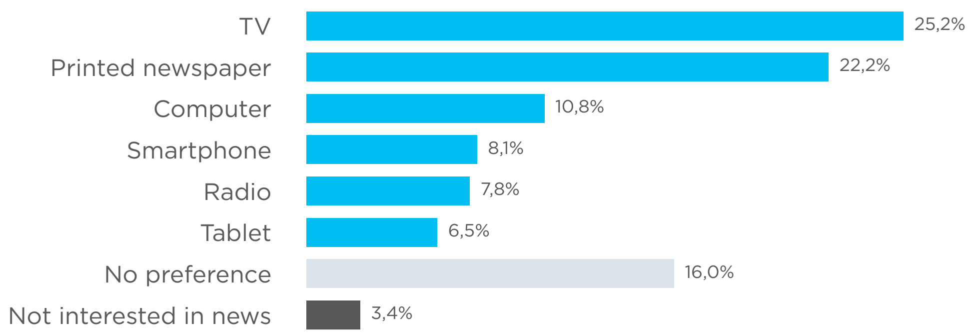
Table 70: Breakdown by age for daily news consumption through different channels (N=2.181).

DIGITAL NEWS SOURCES USED DURING THE LAST MONTH

	COMPUTER	SMART-PHONE	TABLET	ANY DEVICE (COMPUTER, SMARTPHONE OR TABLET)
News site	50,9%	33,5%	24,7%	68,9%
Digital newspaper (e.g. PDF version)	12,7%	7,6%	13,2%	28,9%
Social media	37,1%	33,3%	18,5%	55,0%
Search engine (e.g. Google)	46,6%	27,6%	20,5%	59,7%
Personalised news app (e.g. Flipboard, Zite, Feedly)	2,8%	4,2%	2,7%	8,8%

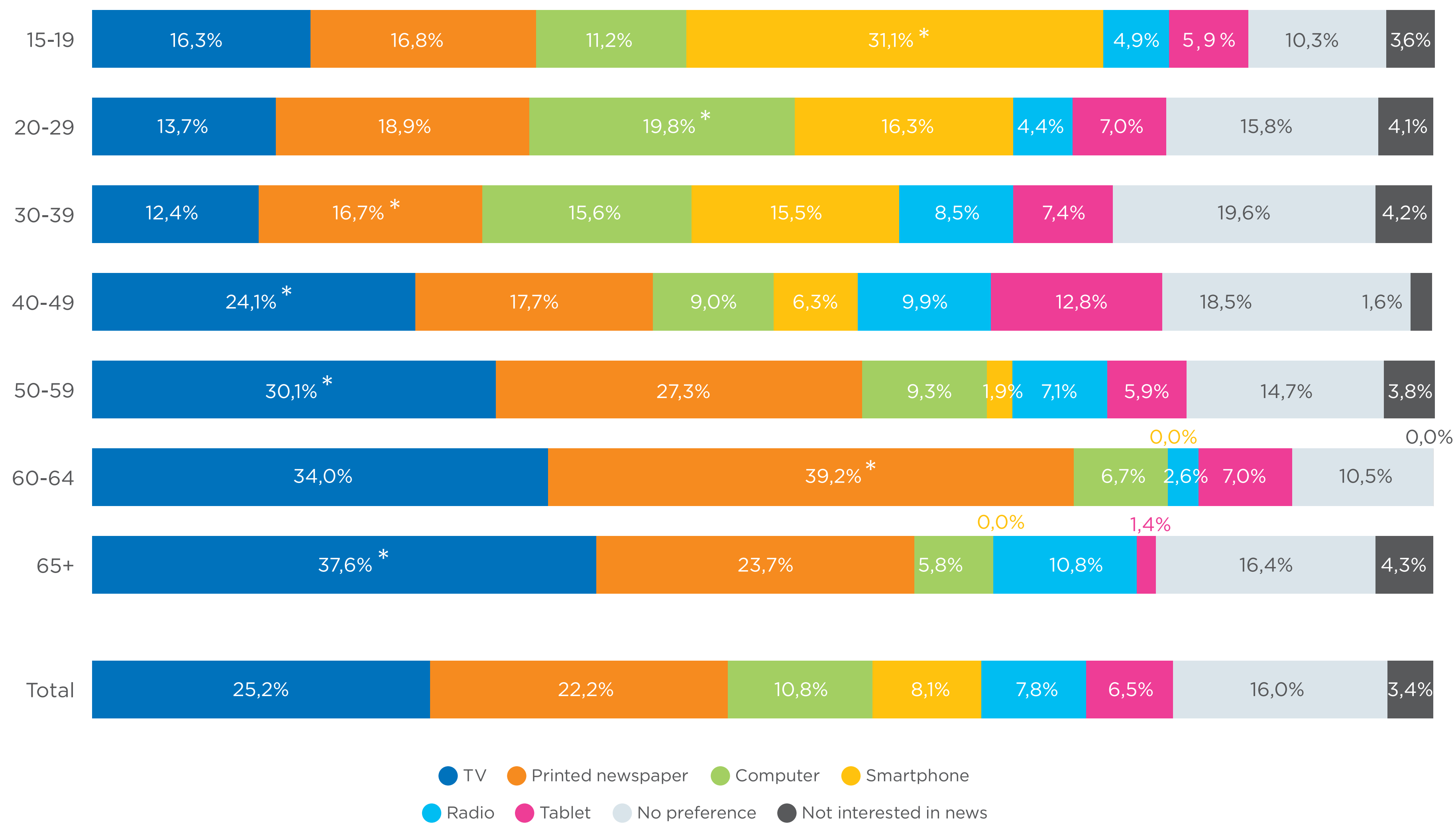
Table 71: Digital news sources used on different devices during the last month (N=2.181)

PREFERRED MEDIA FOR NEWS CONSUMPTION



Graph 80: Which source or device do you prefer to use to monitor the news (N=2.181)?

PREFERRED MEDIA FOR NEWS CONSUMPTION BY AGE



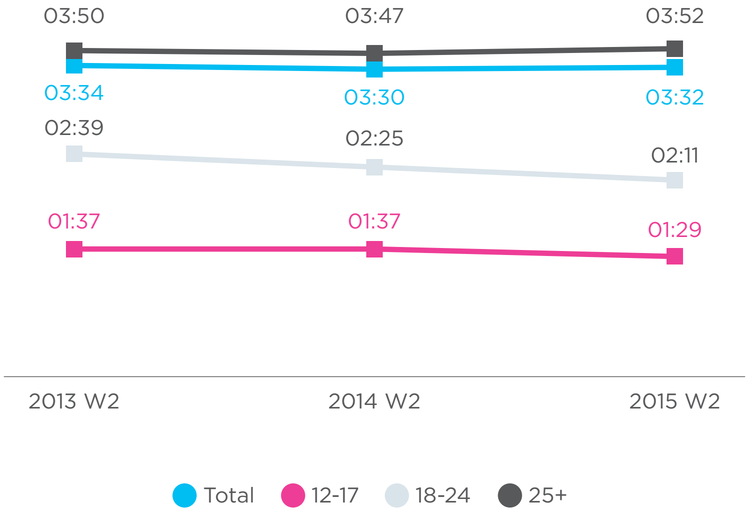
Graph 81: Results by age for the preferred source or device for monitoring the news (N=2.181)

FRAMING THE DATA

RADIO

digiMeter results show that listening to the radio is still a daily routine for three quarters of the Flemings (73,9%). We can however not make any statements about the number of hours and minutes they spend listening to radio. To gain insight, we consulted CIM, which publishes the results of their Radio Study three times a year.[1] Looking at the results of the second period (approximately from April to June) over the last three years, we can see that the average number of listening hours per Fleming has remained stable. In the period April to June 2015, Flemings listened to 3 hours and 32 minutes of radio every day on average. The year before, this was 3 hours and 30 minutes. We do see that the number of listening minutes is decreasing more quickly for the youngest age groups (12-17 and 18-24 years old).

CIM RADIO STUDY: EVOLUTION TIME SPENT LISTENING TO RADIO IN FLEMISH POPULATION ON A DAILY BASIS (FORMAT HH:MM)



Graph 82: CIM Radio Study: Evolution time spent listening to radio in Flemish population (aged 12+) on a daily basis. Figures of second wave of the three most recent years. Source: Var

[1] Source: Var – "CIM Radio Study analysis" (http://bit.ly/Var_CIMradio)

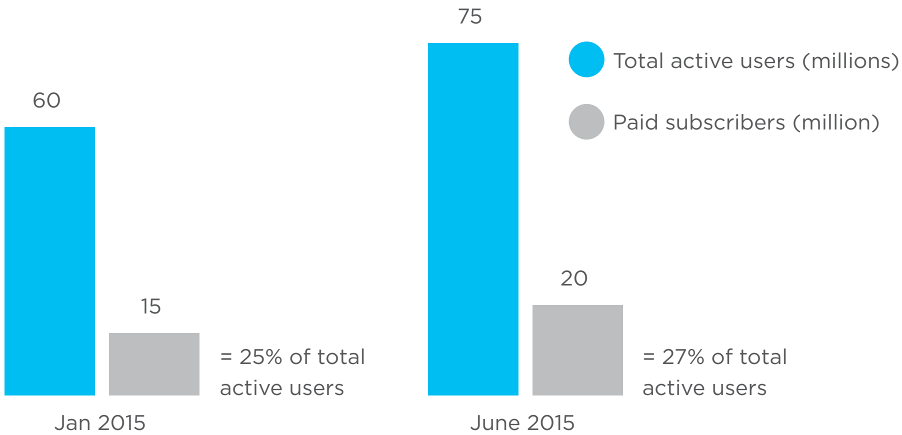
ONLINE MUSIC

Consumption of online music is on the rise in Flanders. Almost six in ten Flemings indicate that they have listened to music via an online music channel in the past month. The most popular channels are still YouTube (45,3%) and Spotify (24,9%). Apple now offers two services as well. A quarter of the Flemish population uses iTunes at least once a month, while the newly founded streaming service Apple Music has convinced 4,1% of the Flemings to try it out only 1-2 months after launch.

Worldwide, YouTube is the absolute leader in music streaming. In the US and the UK, YouTube accounted for 57% of all music streams; the year before 52%.[2] YouTube wants to leverage that position to roll out a paid subscription model. At the end of October 2015, it did in fact launch the "YouTube Red" service.[3] For the moment, the service is only available in the US and it is yet unknown when it will come to our region. Originally, the service was designed specifically as a music streaming service, but Google decided to include all types of video. The price is about $10 per month. In exchange, users can stream videos without commercials and even download them to watch offline. YouTube Red also simplifies music streaming in the background, so subscribers can use other apps or shut off their screen while listening to YouTube Red. There are plans to offer exclusive premium content to subscribers as well (YouTube superstar PewDiePie already announced he'll be making an exclusive series of videos). One last benefit is that YouTube Red subscribers can also use the Google Play Music library for free.

Spotify has 75 million active users worldwide. About 20 million of them (or 27%) have a paid subscription.[4] Early 2015, Spotify had 60 million users with 25% of them (or 15 million) paying. The share of paying users is thus rising slightly. In Flanders, the number of paying Spotify users is stagnating at 25%, which is below the worldwide average. According to Telecompaper, the situation in the Netherlands is completely different.[5] Their number of users is quite comparable (23,4%), but their share of paying users (39%) is way above the Flemish and worldwide average.

SPOTIFY: WORLDWIDE NUMBER OF ACTIVE USERS AND PAID SUBSCRIBERS

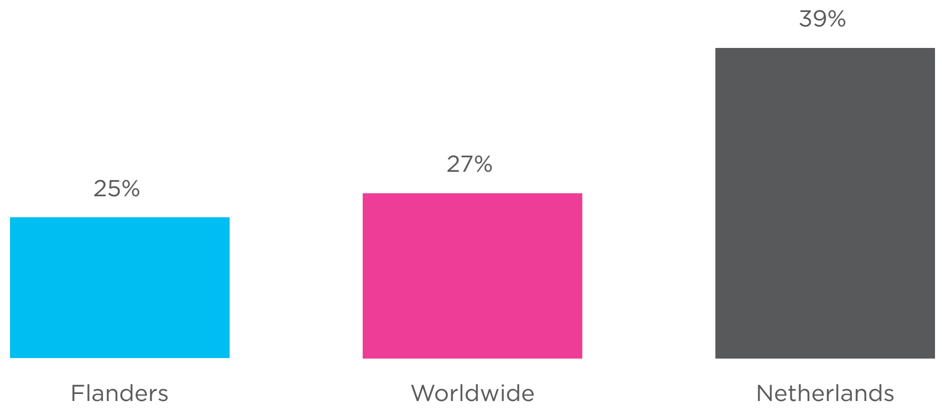


Graph 83: Spotify: Worldwide number of active users and paid subscribers. Source: Re/code

FRAMING THE DATA

[3] Source: CNET – "Everything you need to know about YouTube Red" (http://bit.ly/CNET_YouTubeRed)
[4] Source: Re/code – "Spotify Has 20 Million Paid Subscribers" (http://bit.ly/ReCode_Spotify)
[5] Source: Telecompaper – "Apple Music al grote naamsbekendheid, Spotify meest gebruikt" (http://bit.ly/Telecompaper_MusicStreamingNL)

SPOTIFY: RATIO OF PAID SUBSCRIBERS WITHIN ACTIVE USERS OF SPOTIFY (2015)



Graph 84: Spotify: Ratio of paid subscribers within active users of Spotify (2015).
Source: digiMeter (Flanders), Re/Code (worldwide) and Telecompaper (the Netherlands)

Apple Music was launched last summer. Contrary to most other streaming services, Apple Music only has a paying subscription option. The first three months are still free, but after that, users pay € 9,99 per month for an individual subscription or € 14,99 for a family plan. In August, Apple CEO Tim Cook declared that over 11 million people had already tested the streaming service. In October, this had increased to 15 million users (of which 6,5 million switched to a paid account and 8,5 million users were still enjoying their free trial)[6]. While these figures aren't really impressive (yet), it is still way too early to say whether or not Apple Music is a success.

[6] Source: Fortune – "Tim Cook reveals how many people are rocking out to Apple Music" (http://bit.ly/Fortune_AppleMusic)

NEWS

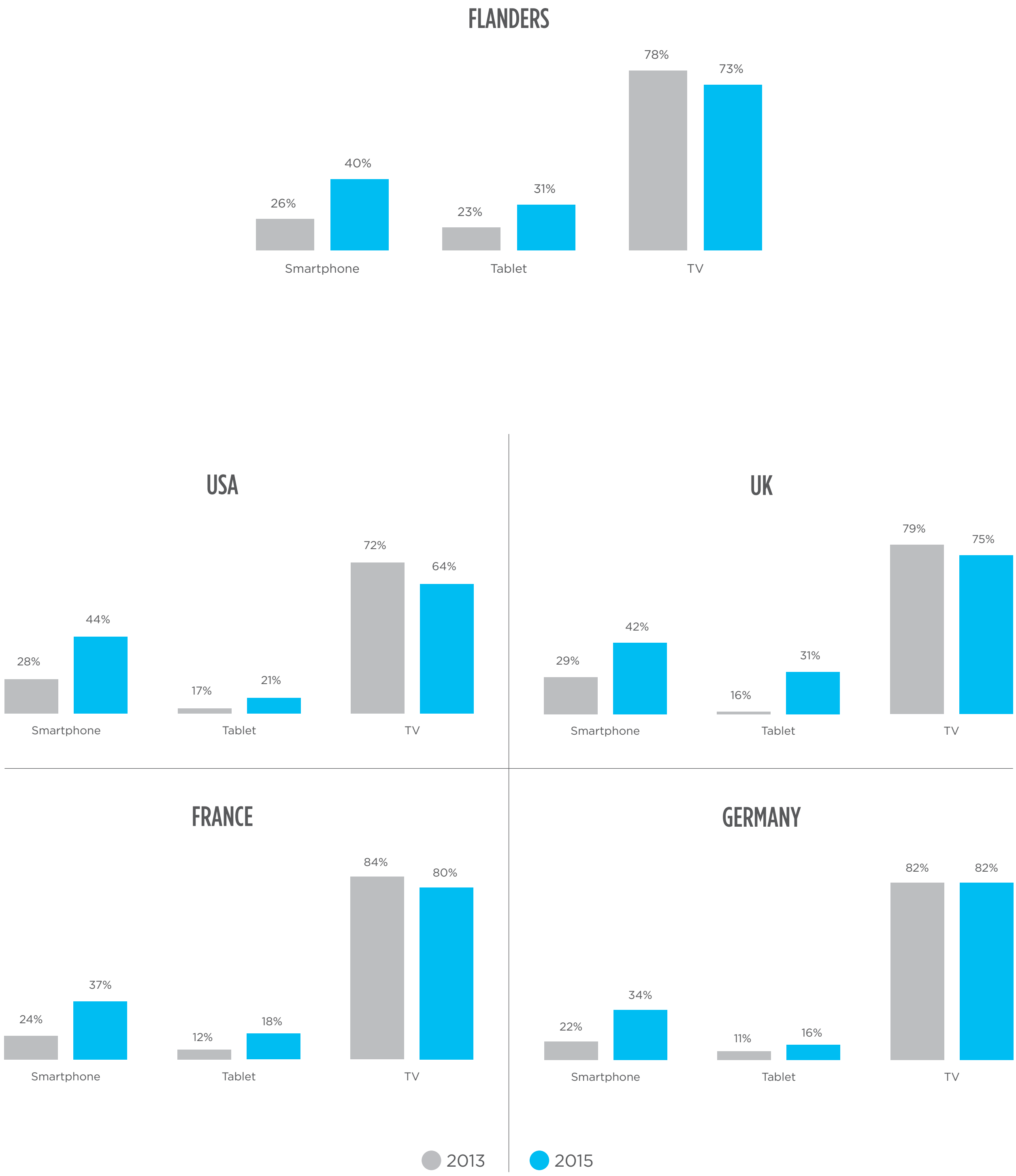
digiMeter results show that traditional media like television and radio are still the most popular channels to follow the news in Flanders, but that they are losing some ground to mobile news consumption (mostly on smartphones). On a weekly basis, 64% is following the news via television, which is 5 percentage points lower than two years ago. Tablet use for news consumption has increased 9 percentage points to 31%, but the biggest growth is found in the weekly use of smartphones as a news source (+14 percentage points to 40% in 2015).

The same trend can be seen internationally.[7] Both in the US and in France, we see that usage of smartphones and tablets as a news source has risen strongly in the past two years (although tablets not as strongly as smartphones), while news consumption via television is decreasing (but still remains far above the level of smartphones and tablets). We see a similar evolution in the UK, except that there, tablets have risen more strongly as a news medium than smartphones in the past two years. In Germany, the weekly use of television for news has remained stable at 82%.

Anno 2015, Flanders is the equivalent of the UK in terms of weekly news consumption via tablets and smartphones. Compared to the US (44%), Flanders (40%) has a lower use of smartphones as a weekly news source, but a higher use of tablets (31% in Flanders versus 21% in the US). The use of these mobile devices is higher in Flanders than in France and Germany when it comes to news consumption on a weekly basis. For nearly three quarters of the Flemish population, television is still a weekly news medium (73%). This puts Flanders at the same level as the UK (75%), and higher than the US (64%), but below the levels of France (80%) and Germany (82%).

[7] Source: Reuters – “Digital News Report” (http://bit.ly/Reuters_DigitalNewsReport)

WEEKLY NEWS CONSUMPTION ACROSS DEVICES (2013-2015)



Graph 85: Evolution 2013 - 2015 of weekly news consumption in US, UK, France, Germany and Flanders across devices. Source Flanders: digiMeter. Source US, UK, France and Germany: Reuters Digital News Report.

CHAPTER 08

GENERAL MEDIA USE

GENERAL MEDIA USE

CHAPTER 08

INFOGRAPHIC

GENERAL MEDIA USE:

Telecoms, wearables, data storage and most indispensable devices

Changes in telecoms subscriptions

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

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

Wearables

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

Smart sports watch	Smart wristband	Smart watch	At least 1 type
4%	**2%**	**2%**	**8%**

Data storage

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

Internal memory of device
67%

External, physical storage location
51%

At least 1 of the following:
49%

25%
Dropbox

21%
Mailed to yourself as an attachment

17%
Google drive or Google docs

Most indispensable technology

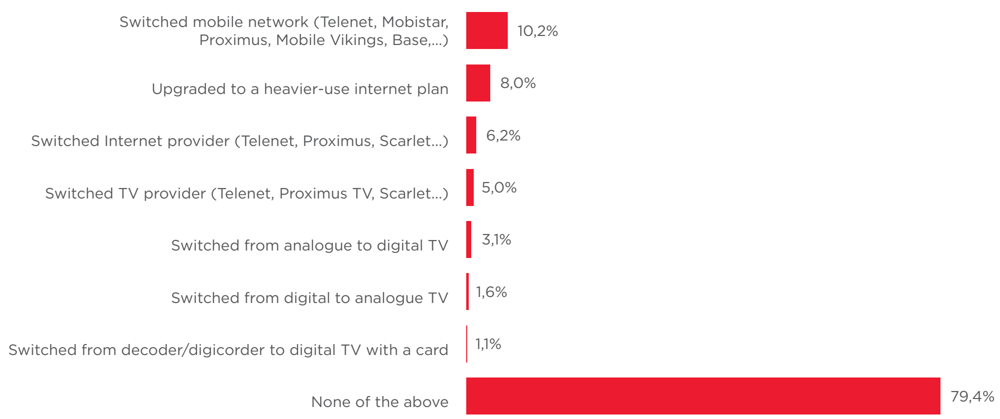
Television sets, smartphones and laptops are the most indispensable technologies for Flemish people.

GENERAL MEDIA USE

CHANGES IN MEDIA AND TELECOM SUBSCRIPTIONS

- Almost 8 out of 10 respondents made no changes to any of the listed subscriptions in the past year (79,4%).
- The most frequent change is switching mobile network providers (10,2%).
- 8,0% of the Flemish population said they switched to a heavier-use internet plan in the past year. This is linked to the increase in internet video consumption. Half of the respondents who stated that they had upgraded to a heavier-use internet plan in the past twelve months said they watched online video content on a computer every week. This is significantly higher than in the overall population (27,8%). The weekly online video consumption on tablets (35,3%) and smartphones (38,3%) is also higher in this category than in the overall population (14,4% and 15,8% respectively). This higher online video consumption is (partly) related to the advent of Netflix. In this group, a quarter of the respondents say they have a Netflix subscription (25,4%). This is significantly higher than in the overall population (11,5%, see chapter TV). This finding seems to confirm a premise in the digiMeter Netflix study [1]. The advent of Netflix caused a lot of Flemish people to hit the data limits of their internet plans making an upgrade to a heavier-use subscription with more data desirable or even inevitable. A win for the operators which must be offset with the corresponding loss in terms of pay TV subscriptions.

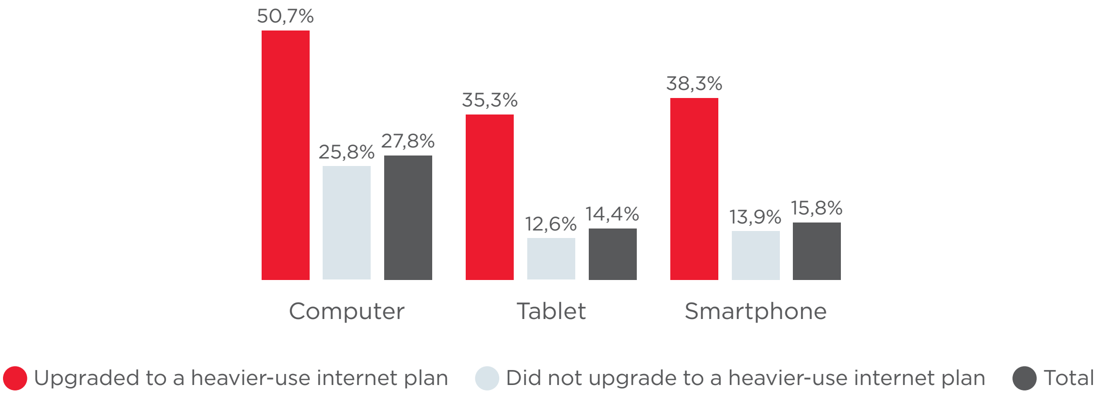
SWITCHED IN THE PAST 12 MONTHS



Graph 86: Which media or telecoms subscriptions did you modify in the past twelve months (N=2.181)?

[1] You can find further information about the digiMeter Netflix study at http://bit.ly/dM_Netflix

ON WHICH DEVICES DO YOU WATCH VIDEO CONTENT WEEKLY?



Graph 87: On which devices do you watch online video every week - Split by upgrade or no upgrade to a heavier internet plan in the past 12 months (N=2.181)

WEARABLES

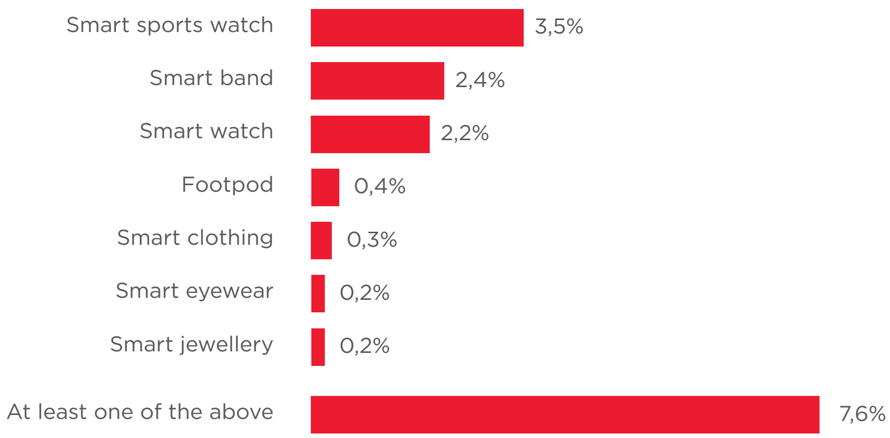
- Although 7,6% own a wearable,[2] these devices have not yet been widely adopted. Currently, owners of wearables are mainly men (68,9%) between the ages of 30 and 49 years of age (49,9%) and these wearable adopters are almost all (92%) in the segment of smartphone owners (the device of which/for which the wearable is often an extension).

- The most popular wearable is the smart sports watch (3,5%). These watches are specifically used to record one's sports performance (distance, speed, duration, route, heart rate...). Well-known brands include Polar and Magellan.

- Smart wristbands by brands like Fitbit and Jawbone (wristbands that record personal data such as movement and heart rate) or the smart watch such as Apple Watch or Samsung Gear (a watch that connects to the Internet, possibly through your smartphone, and on which you can use apps such as navigation, agenda, notifications for incoming calls or messages, measure your heart rate, etc.) are also among the most frequently cited wearables (2,4% and 2,2% respectively). The other wearables reach less than 1% of the Flemish population.

[2] Wearables are portable digital devices (but not a smartphone or tablet), which you can wear on your body and/or in clothes to measure and digitally store personal information and share it online, or to check internet information quickly (e.g., incoming e-mails, breaking news, reminders for scheduled activities in your agenda). We do not mean a smartphone, which can also be used to measure and view content. Some examples include Apple Watch, Google glass, Fitbit, Footpod etc.

OWNERSHIP OF WEARABLES



Graph 88: Which wearables do you currently own? (N=2.181)

BREAKDOWN BY GENDER FOR OWNING WEARABLES

	MEN	WOMEN	TOTAL
Gender profile	68,9%	31,1%	**100,0%**
Level of adoption by gender	10,7%	4,6%	**7,6%**

Table 72: Breakdown by gender for owning any of the enlisted wearables (N= 2.181)

BREAKDOWN BY AGE FOR OWNING WEARABLES

	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	9,2%	18,5%	23,0%	26,9%	15,1%	4,4%	2,9%	**100,0%**
Level of adoption by age	10,7%	9,8%	11,6%	12,1%	6,6%	4,6%	0,9%	**7,6%**

Table 73: Breakdown by age for owning any of the enlisted wearables (N= 2.181)

PREFERRED MEDIA DEVICE INTENDED TO BUY

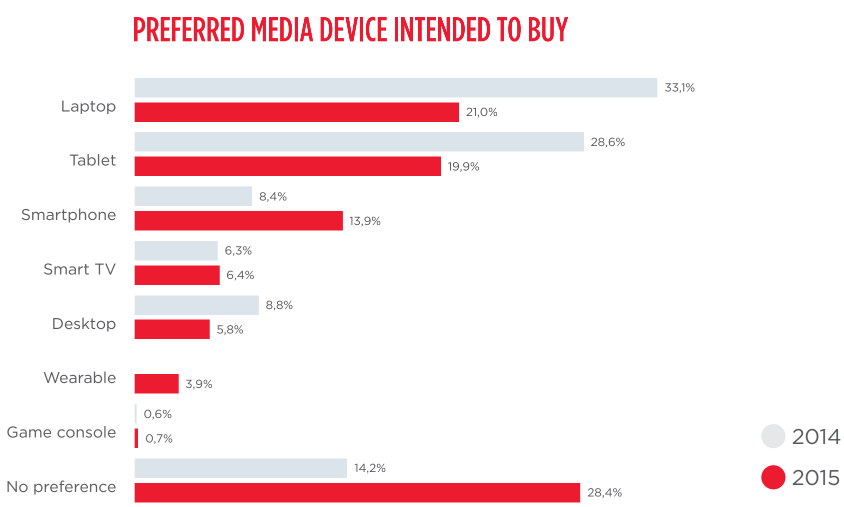
- Asked whether they have the intention to buy a device in the near future, 28,4% said that they have no preferred device. It is worth noting that this is double the figure of last year, which was 14,2% at the time. The reason for this can be the ever more saturated market, in which most devices (except smartphones and wearables) seem to have reached a peak in terms of adoption.

- Laptops (21,0%) and tablets (19,9%) are the most frequently cited devices. However, both devices have lost a lot of ground compared with last year (-12,1 and -8,7 percentage points respectively). It is striking, however, that the intention to buy remains high for tablets (and is still greater than the intention to buy for smartphones) in view of the fact that this device is now less used (see chapter Tablet).

- Only 3,9% say they would prefer to buy a wearable. At first glance, the wearables market in Flanders does not seem likely to grow exponentially in the coming year. It is however worth bearing in mind that this is a deliberate intention to buy. Anyone planning to buy both a wearable and a smartphone must decide between them in this question. The real intention to buy therefore may be higher than what was captured in this study.

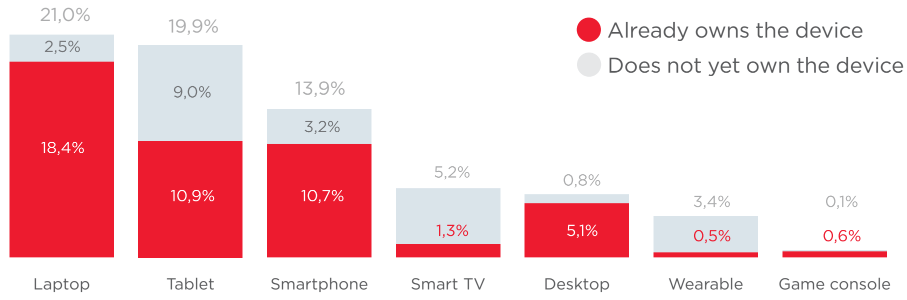
- The intention to buy for most devices tends to be highest among those who already have a similar device; in essence, these are replacement purchases rather than a new adoption of a device. For tablets, however, the intention to buy is roughly the same among those who do not own a tablet yet (9,0%) as it is for those who do already own a tablet (10,9%). Only in the case of Smart TV and wearables, the intention to buy is the highest for those who do not yet own a Smart TV or a wearable. In view of the relatively low adoption rates for both devices (especially for wearables) it is not surprising that the growth potential for them is the highest.

- The under-30s mainly prefer to buy a smartphone or a laptop. In the 30 to 59 age group, there is a marked preference for buying a tablet. The "no preference" option had the highest score in the over-60 category.



Graph 89: Suppose you would buy a media device in the near future, which device would you prefer? (2015: N=2.181, 2014: N=2.028)

INTENTION TO BUY A MEDIA DEVICE - BREAKDOWN BY OWNERSHIP OF DEVICE



Graph 90: Intention to buy a media device - breakdown by whether or not the respondent already owns a similar device (N=2.181)

BREAKDOWN BY AGE FOR PREFERRED INTENTION TO BUY A MEDIA DEVICE

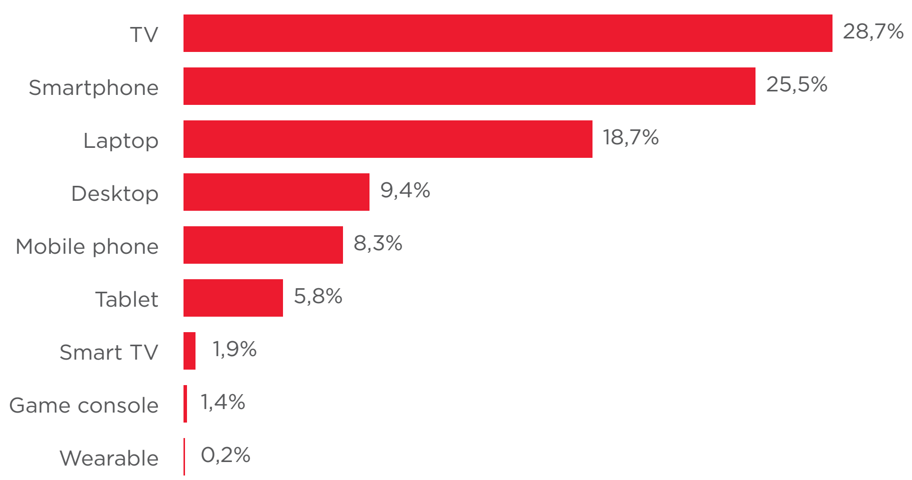
LAPTOP	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	8,7%	19,1%	15,2%	15,4%	18,3%	7,7%	15,5%	**100,0%**
Preference by age	27,7%	28,1%	21,3%	19,2%	22,3%	22,6%	14,2%	**21,0%**
TABLET								
Age profile	3,3%	11,6%	15,2%	20,7%	20,6%	7,2%	21,5%	**100,0%**
Preference by age	9,9%	16,2%	20,1%	24,6%	23,8%	20,1%	18,7%	**19,9%**
SMARTPHONE								
Age profile	15,7%	21,1%	23,4%	16,5%	16,1%	3,4%	3,9%	**100,0%**
Preference by age	33,2%	20,5%	21,6%	13,7%	13,0%	6,6%	2,4%	**13,9%**
SMART TV								
Age profile	1,0%	15,5%	13,1%	15,8%	19,0%	8,4%	27,1%	**100,0%**
Preference by age	1,0%	6,9%	5,6%	6,0%	7,1%	7,5%	7,6%	**6,4%**
DESKTOP								
Age profile	5,4%	17,4%	15,4%	12,8%	16,6%	8,1%	24,2%	**100,0%**
Preference by age	4,9%	7,1%	6,0%	4,4%	5,6%	6,6%	6,2%	**5,8%**
WEARABLE								
Age profile	12,1%	25,5%	14,9%	24,9%	13,6%	4,1%	5,0%	**100,0%**
Preference by age	7,1%	6,9%	3,8%	5,7%	3,1%	2,2%	0,8%	**3,9%**
GAME CONSOLE								
Age profile	1,7%	39,8%	35,0%	20,5%	0,0%	2,9%	0,0%	**100,0%**
Preference by age	0,2%	1,9%	1,6%	0,8%	0,0%	0,3%	0,0%	**0,7%**
NO PREFERENCE								
Age profile	3,7%	6,2%	10,5%	15,1%	15,3%	8,7%	40,5%	**100,0%**
Preference by age	16,1%	12,4%	20,0%	25,5%	25,2%	34,2%	50,1%	**28,4%**

Table 74: Suppose you would buy a media device in the near future, which device would you prefer? Breakdown by age (N=2.181)

MOST INDISPENSABLE TECHNOLOGY

- TV sets (28,7%) and smartphones (25,5%) have become an indispensable part of the lives of most Flemish people.
- In view of the relatively low adoption of wearables, game consoles and Smart TV, it is only logical that these are cited least frequently as the most indispensable technology (0,2%, 1,4% and 1,9% respectively).
- People between the ages of 15 and 19 years old cannot live without their smartphone (54,0%). The category of 20 to 39-year-olds would also have a hard time doing without their smartphones, but laptops also score well in this category. The category of 40 to 49-year-olds had the highest score for tablets as indispensable technology (11,7%) although the scores for smartphones (35,0%) and TV sets (21,6%) are even higher. From the age of 50 upwards, the TV set is by far the most indispensable technology in a household.

WHICH TECHNOLOGY WOULD YOU MISS THE MOST?



Graph 91: Which technology would you miss the most? (N=2.181)

BREAKDOWN BY AGE FOR MOST INDISPENSABLE TECHNOLOGY

TV	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	2,4%	4,4%	9,8%	12,6%	20,3%	10,1%	40,3%	**100,0%**
Preference by age	10,6%	8,9%	18,7%	21,6%	33,9%	40,5%	50,5%	**28,7%**
SMARTPHONE								
Age profile	13,9%	23,6%	22,3%	23,0%	9,7%	3,1%	4,3%	**100,0%**
Preference by age	54,0%	42,3%	38,0%	35,0%	14,4%	10,9%	4,8%	**25,5%**
LAPTOP								
Age profile	4,1%	23,7%	17,7%	14,5%	15,7%	6,6%	17,8%	**100,0%**
Preference by age	11,6%	31,1%	22,0%	16,1%	17,0%	17,1%	14,5%	**18,7%**
DESKTOP								
Age profile	5,7%	11,9%	14,3%	11,5%	21,4%	10,5%	24,8%	**100,0%**
Preference by age	8,1%	7,8%	9,0%	6,4%	11,7%	13,7%	10,2%	**9,4%**
GSM								
Age profile	4,0%	8,6%	5,6%	13,6%	22,4%	8,9%	36,9%	**100,0%**
Preference by age	5,0%	5,0%	3,1%	6,7%	10,7%	10,2%	13,3%	**8,3%**
TABLET								
Age profile	3,5%	3,9%	14,9%	33,6%	27,6%	5,7%	10,9%	**100,0%**
Preference by age	3,1%	1,6%	5,8%	11,7%	9,4%	4,6%	2,8%	**5,8%**
SMART TV								
Age profile	12,4%	5,2%	6,0%	9,8%	19,4%	7,6%	39,7%	**100,0%**
Preference by age	3,6%	0,7%	0,8%	1,1%	2,2%	2,0%	3,3%	**1,9%**
GAME CONSOLE								
Age profile	18,6%	21,3%	28,6%	5,3%	10,0%	4,9%	11,3%	**100,0%**
Preference by age	3,9%	2,0%	2,6%	0,4%	0,8%	0,9%	0,7%	**1,4%**
WEARABLE								
Age profile	0,0%	21,0%	0,0%	79,0%	0,0%	0,0%	0,0%	**100,0%**
Preference by age	0,0%	0,3%	0,0%	0,9%	0,0%	0,0%	0,0%	**0,2%**

Table 75: Which technology would you miss the most? Breakdown by age (N=2.181)

DATA STORAGE: PHYSICAL STORAGE VERSUS CLOUD APPLICATIONS

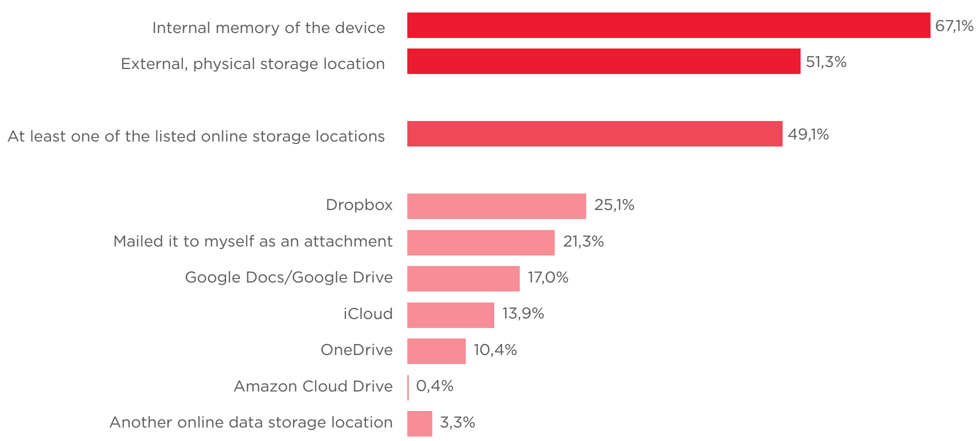
- The use of cloud storage services for storing data no longer is a niche product. In the past month, 49,1% have used at least one of the listed online storage services (Dropbox, Google Drive/Google Docs, iCloud, One Drive, Amazon Cloud Drive or sent as an attachment to yourself in a mail). However, physical storage devices are still more widely used, especially the internal memory of a device (e.g., the internal hard disc of a computer), which is still the most popular storage location (67,1%). The use of the cloud for storing data, however, is approaching that of external, physical storage devices such as the USB stick, external hard drive or SD card, which 51,3% of the Flemish population used in the last month.

- Dropbox is the most popular online storage service, having been used by 25,1% of Flemish people in the past month. It is worth noting that 1 in 5 respondents mailed a file to themselves in the past month in order to have online access to it (21,6%). In spite of the growing number of (free) online storage services, mailing files to yourself is still a very popular way of storing data. In the past month, 17,0% of the Flemish population used Google's data storage services, such as Google Drive and Google Docs.

- Of the 76,8% that used physical or online storage in the past month for storing digital data, the majority indicate that they have used a mixture of physical and online data storage options (43,8%). Just over a quarter of the Flemish population say they have only used physical storage options (27,6%) whereas 5,3% state that they have only used online storage options.

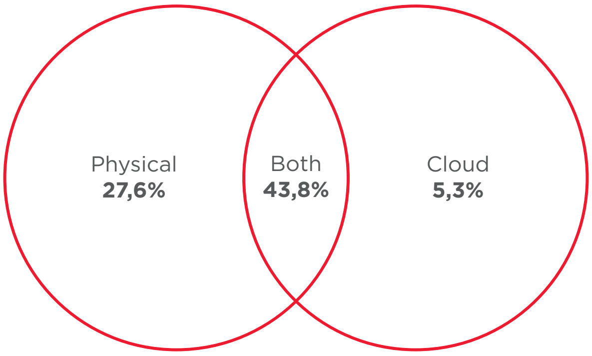
- Physical storage options are more widespread than cloud storage services in every age category. The difference is relatively limited among 15 to 19-year olds, but the older the profile, the greater the gap.

DATA STORAGE: PHYSICAL STORAGE VERSUS CLOUD APPLICATIONS



Graph 92: Which of the following data storage locations have you used last month?(N=2.181)

TOTAL USE OF DATA STORAGE DURING THE LAST MONTH: 76,8%

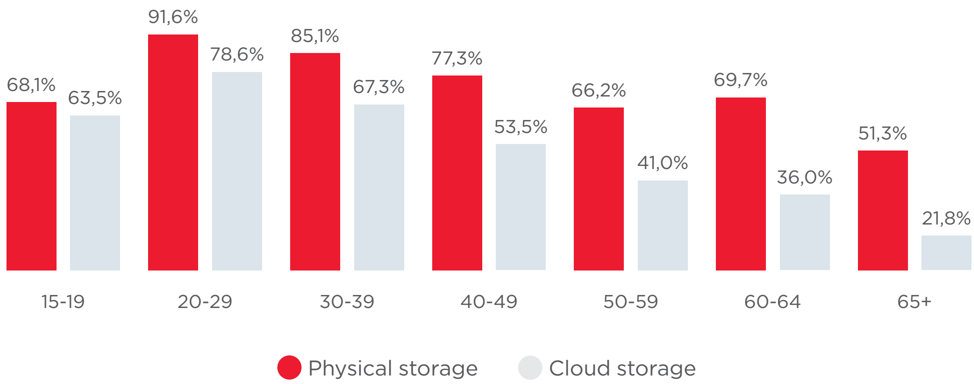


BREAKDOWN BY AGE FOR STORAGE OF DATA: PHYSICAL STORAGE VERSUS CLOUD APPLICATIONS

PHYSICAL STORAGE	15-19	20-29	30-39	40-49	50-59	60-64	65+	TOTAL
Age profile	6,2%	18,3%	17,9%	18,1%	15,9%	7,0%	16,5%	**100,0%**
Usage by age	68,1%	91,6%	85,1%	77,3%	66,2%	69,7%	51,3%	**71,5%**
CLOUD STORAGE								
Age profile	8,5%	22,8%	20,6%	18,3%	14,4%	5,3%	10,2%	**100,0%**
Usage by age	63,5%	78,6%	67,3%	53,5%	41,0%	36,0%	21,8%	**49,1%**

Table 76: Physical storage versus cloud applications - Breakdown by age (N=2.181)

BREAKDOWN BY AGE FOR STORAGE OF DATA: PHYSICAL STORAGE VERSUS CLOUD APPLICATIONS



Graph 93: Physical storage versus cloud applications - Breakdown by age (N=2.181)

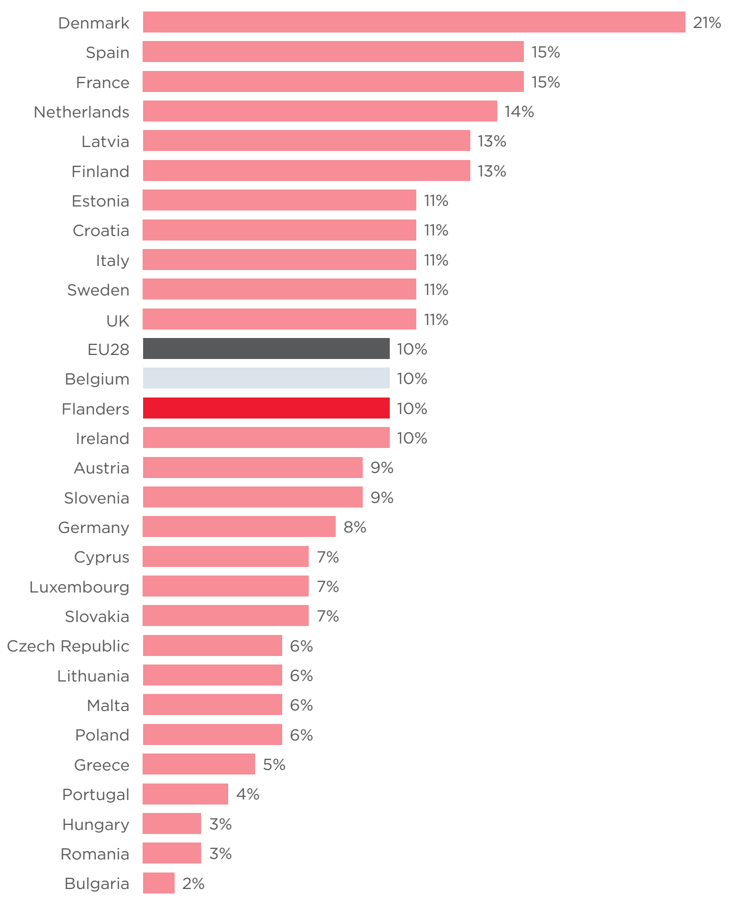
GENERAL MEDIA USE

FRAMING THE DATA

CHURN BEHAVIOR

According to digiMeter, one in ten Flemings has changed mobile providers in the past year (called 'churn'). According to the Eurobarometer commissioned by the European Commission (published late 2014), this would put Flanders in line with the European average and the figures for Belgium.[1] Denmark has the highest churn rate, with over one in five Danes switching to another provider last year. In countries like Spain (15%), France (15%) and the Netherlands (14%), the churn for mobile providers is higher than in Flanders as well. Lower figures can be found in Germany (8%), among others.

CHURN MOBILE PROVIDER WITHIN LAST YEAR

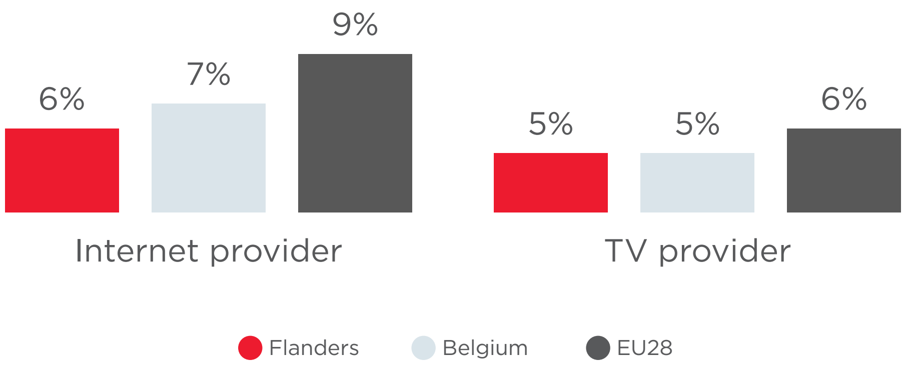


Graph 94: Churn rate mobile provider within last year. Source: European Commission (except Flanders: digiMeter 2015)

[1] Source: European Commission – "Eurobarometer. E-communications household survey and telecom single market survey" (http://bit.ly/EC_EBecomm)

As digiMeter shows, the Flemish churn figures for Internet and television providers are also in line with the figures for Belgium and the European average.

CHURN RATE INTERNET / TV PROVIDER WITHIN LAST YEAR



Graph 95: Churn Internet provider and TV provider within last year. Source: European Commission (except Flanders: digiMeter 2015)

WEARABLES

Wearables are still a niche product in Flanders, with only 8% of the population reporting that they own one. The most common types are smart sports watches (4%), smart wristbands (2%) and smart watches (2%). In other countries as well, adoption of wearables is still limited. According to market research company GfK, 1% of the Dutch population has a smart watch at home.[2] In the UK[3] and the US[4] this is 3%. Activity trackers (like fitness wristbands) do show substantial adoption in the US at 11%.

Are we to expect that the adoption of wearables will boom in the coming years, as was the case with smartphones and tablets? Market analysts are certainly expecting a strong surge in the number of shipped wearables in the coming years.[5] In 2015, a total of 76,1 million wearables will have been shipped. In 2014, this number was only 28,9 million. According to IDC, 173 million wearables will ship in 2019. This would mean that wearables would reach the same level as the number of shipped laptops in 2015 (167,5 million)[6]. The main driver behind this growth is the Apple Watch. IDC says 13,9 million Apple Watches were shipped in 2015 and shipments will reach 40,3 million units by 2019.

[1] Source: Telecompaper (based on GfK study) – "GfK: 96 procent jongeren bezit smartphone, 57% een tablet" (http://bit.ly/Telecompaper_GfK_MediaNL)

[2] Source: Ofcom – "The Communications Market Report – UK edition" (http://bit.ly/Ofcom_CMR_UK_2015)

[3] Source: Adweek – "Infographic: Which Wearable Tech Device Will Win? Demographics and awareness for fitness trackers and smartwatches" (http://bit.ly/Adweek_WearablesUS2015)

[4] Source: IDC – "Fueled by Growing Demand for Smart Wearables, IDC Forecasts Worldwide Wearable Shipments to Reach 173.4 Million by 2019" (http://bit.ly/IDC_WearablesShipments2015-2019)

[5] Source: IDC – "PC shipments to dip 5% in 2015, prices expected to rise, tablet growth has slowed" (http://bit.ly/IDC_PCshipments)

PROFILES

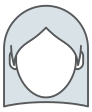
PROFILES

PROFILES

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

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

The cluster analysis [1] resulted in five segments. While we see a clear link with the segments from digiMeter 2014, there are a number of remarkable shifts.



ONLINE MEDIA MASTER (26,1%).

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

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

HEAVY MEDIA OMNIVORE (19,4%).

Last year we saw the emergence of a profile with a wide media consumption pattern and a high willingness to pay: the Media Omnivore (22,1%). This year, we see the return of this segment albeit in a more concentrated form. Consisting of 19,4% of the Flemish population, Heavy Media Omnivores have fewer members than the Media Omnivores last year (who mainly migrated to Professional Explorers and Online Media Masters). In terms of media consumption, however, the strength of this segment has only increased. Both in traditional and new media, it dominates all other profiles, both in the diversity and quantity of owned devices and subscriptions, and in frequency of use. Like last year, this segment has both the means and the willingness to pay for this wealth of media. It mainly has an inflow of Online Media Masters who have evolved into young families and have taken their first career ladder steps. This results in less budgetary restrictions but also less time. Heavy Media Omnivores are therefore willing to pay for services allowing them to efficiently obtain desired content (for example video-on-demand services like Netflix or music-streaming services like Spotify).

PROFESSIONAL EXPLORER (16,2%)

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

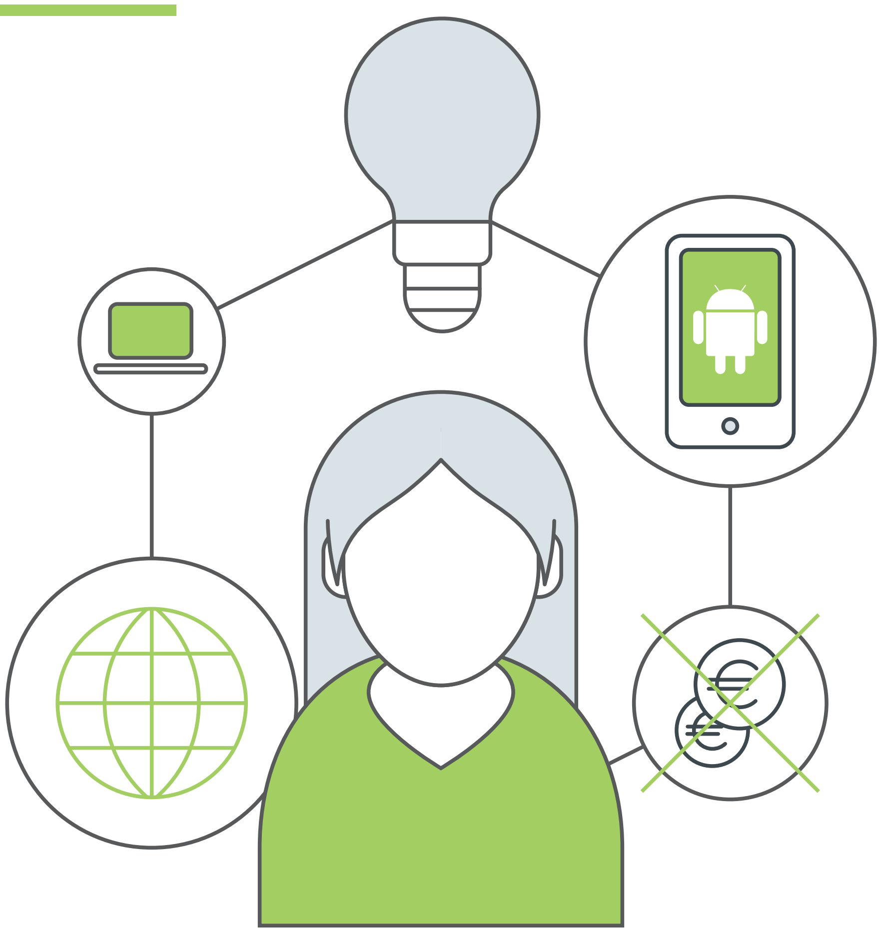
PLAYFUL EXPLORER (13,5%)

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

TRADITIONAL MEDIA FAN (24,9%)

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

ONLINE MEDIA MASTER
(26,1%)



The Online Media Master segment is the only one unchanged compared to last year's report. It is characteristic for this segment, which contains lots of young people and students, that media consumption is geared mainly towards laptops and smartphones. Like last year, we notice that this segment is not big on paying for media. Illegal downloading is still popular and Online Media Masters need to make informed choices with regard to their devices.

SOCIO-DEMOGRAPHIC

Like last year, this profile contains the highest number of people under thirty years old (38,0%). Remarkably, the biggest growth within this segment is coming from 30-49-year-olds (+10,4). This also shows that this age category is growing increasingly familiar with digital media and technology, so familiar even that they reach for online media consumption sources first (most often laptops or smartphones) and more traditional forms of media second.

Men and women are still represented equally strong within the Online Media Masters (49,5% and 50,5% respectively). Compared to last year, however, women have increased their presence (+2,8).

There are little changes in profession and education compared to 2014. Online Media Masters are mainly students (27,1%) or white-collar workers (29,0%) and have received higher education (39,3% if we correct for the high number of students hoping to graduate within the next few years).

Considering the high number of young people within this segment, it isn't surprising that nearly one in three is still living with their parents (32,9%). Online Media Masters mainly live in households with two to four members (73,3%).

Over one in five does not know what the net family income is (22,5%), a response driven by the Online Media Masters still living with their parents.

DEVICES

Online Media Masters have a high adoption rate for laptops (89,4%). As with the Heavy Media Omnivores, everyone within this segment owns a smartphone. The adoption of connected (41,8%) and handheld (20,8%) game consoles is higher than the average of the total Flemish population. Just like last year, this segment is not the biggest fan of tablets: only 39,0% indicates that they own a tablet at home. One in three has a Smart TV at home.

TELEVISION

Online Media Masters are not the biggest television watchers. Just like in the other segments, almost everyone does have a television screen within the household, but they use it less often. 56,8% of the Online Media Masters watch at least one hour of television content via television screen, while the number for the total population is 64,6%. Watching television shows and other videos on the computer is significantly higher (42,1% does so weekly and 21,8% daily) than in the total population (27,8% weekly and 13,1% daily). The smartphone also became an important source of video consumption, with 26,3% of the Online Media Masters watching video content via smartphone on a weekly basis (compared to 15,8% in the total population) and 12,5% using their smartphones for video consumption every day (8,2% in the population).

When watching television, Online Media Masters keep their smartphones or laptops within reach. 85,4% of them have used the Internet while watching television in the last month, a higher degree of media multitasking than in the total population (69,9%).

COMPUTER

Not only is the ownership of laptops very high for Online Media Masters, they also use them frequently and for a variety of applications, mainly related to entertainment. Over eight in ten indicate that they spend at least one hour a day at the computer (81,0%), compared to 68,4% in the total population. The daily use of social media via computer is also remarkably high compared to the total population (65,0% versus 55,0%). Daily chatting on the computer is higher as well (32,7% versus 26,0%). Functional uses like reading (73,7%) and sending (58,2%) emails and using office applications (34,2%) score lower than in the total population (77,1%, 65,8% and 36,8% respectively).

Online Media Masters have the second-highest rate for daily streaming and downloading of movies, series and music (Heavy Media Omnivores take first place). More often than in the total population, this downloading is illegal. 60,3% of Online Media Masters who ever downloaded a film or series have done so illegally (versus 52,3% in the total population). For music, these numbers are 43,6% versus 35,1%. To stream content, Online Media Masters often use a mix of legal and illegal sources. The proportion that streams music (12,7%) or movies and series (38,1%) illegally is higher than in the total Flemish population (8,8% and 30,3% respectively).

TABLET

Even though the adoption of tablets is higher for Online Media Masters than last year (39,0% versus 18,4% last year), the device still remains less popular within this segment. When they do use the tablet personally (which is the case for only one in three), they do so less than daily and use the home Wi-Fi connection. It should be noted that their tablet-buying intentions are slightly above average: 23,7% of Online Media Masters are considering a tablet within the year, versus 20,6% in the total population. A possible explanation is that the segment of Online Media Masters has become wider. Digital natives are getting older and are no longer just students. Year after year, the segment contains more young families (with small children) and has more disposable income. The increase in buying intentions and the amount of tablets purchased can thus be credited to these young digitally native families, who have the budgetary space for an extra screen. The tablet is seen as a shared device for entertainment purposes.

TELEPHONY

Every Online Media Master owns and uses a smartphone. The market share for Android is the highest in this segment (57,2%). Almost all Online Media Masters use their smartphones every day (98,2%) and do so in a highly varied way. Just like with laptops, their daily use of social media scores higher for smartphones (66,5%) than in the total population (60,4%), while applications like reading (61,7%) or sending (36,3%) emails score lower (63,0% and 41,8% respectively).

Sending text messages is very popular with Online Media Masters. Not only do more of them send out text messages every day (74,9%) than the rest of the population (70,0%), sending messages via over-the-top services is also much more common (60,4%) than with the average smartphone user in Flanders (51,8%). Online Media Masters have the highest number of daily Snapchat users (19,3%), while Facebook Messenger is even more popular at 43,4% (versus 39,3% in the total smartphone population in Flanders).

SOCIAL MEDIA

In the paragraphs on usage of computers and smartphones, we already saw that Online Media Masters are big social media users. Nine in ten Online Media Masters report that they have logged into at least one social network (90,1%) last month, a much higher rate than in the total Flemish population (72,4%). Their share of monthly active users is higher for every social network (except Ello). Facebook is again the most popular one by far: 85,7% of Online Media Masters logged into Facebook in the previous month; in the total population this is 66,9%. Monthly use of YouTube (36,5%) and Instagram (24,7%) is significantly higher than in the total population as well (29,9% and 17,0% respectively). This segment also holds the highest number of Facebook and Instagram users spending at least 3 hours per day to these social networks.

GAMING

Online Media Masters play games more often than the average Fleming. Nearly seven in ten of the Online Media Masters have played a game (69,0%) versus 55,1% in the total population. This segment scores higher for any device (except the tablet), but smartphone gaming scores particularly high: 50,1% of Online Media Masters played a game on a smartphone in the previous month, compared to 30,4% in the total Flemish population. The number of people gaming for at least an hour a day is higher for Online Media Masters (17,0%) than for the total population as well.

TRADITIONAL MEDIA

Across all segments, Online Media Masters are least likely to listen to the radio on a daily basis (67,4% compared to 73,9% in the total population). When they do listen every day, they mostly do so in their car (50,5%).

Online Media Masters prefer to listen to online music channels. With 75,2% having listened to at least one online music channel, Online Media Masters are the second biggest users of online music (second only to the Heavy Media Omnivores scoring 91,1%). The most commonly cited channels are the usual suspects YouTube (63,1%) and Spotify (30,4%). Despite their high use of online music channels, paying for online music is lower than average: 26,9% of Online Media Masters pay to use online music; for the total Flemish population, this is 37,1%.

To follow the daily news, Online Media Masters use sources in line with how they generally consume media: very high for smartphone use (41,6% of Online Media Masters use their smartphones on a daily basis for news, compared to 29,3% in the total Flemish population), while traditional media like television, radio and newspapers are well below the Flemish average. It should come as no surprise that Online Media Masters cite their laptop or smartphone as preferred device for news consumption more often than the total Flemish population.

GENERAL MEDIA

14,3% of Online Media Masters switched mobile operators in the last year. Along with the Heavy Media Omnivores, they have the highest mobile churn rate of all segments.

Online Media Masters are not known for their big spending when it comes to media. The same can be said when it comes to devices. A device is often only purchased if it has substantial added value. This is one of the reasons why tablets have low adoption rates within this segment. It should come as no surprise that the number of Online Media Masters owning a wearable is still relatively small: 6,6% of them currently own a wearable (versus 7,6% in the total Flemish population). Most often, this is a smart sports watch (3,2%).

When asked which technology they could not do without, we get an idea of Online Media Masters' two favorite devices: 41,1% prefer their smartphones (versus 25,5% in the total Flemish population) and 26,3% prefer their laptops (versus 18,7%). Televisions score a lot less high in this segment (15,5%) than in the total Flemish population (28,7%).

The majority of Online Media Masters is familiar with storing data in the cloud. Six in ten of them have used at least one cloud service in the last month to store data (versus 49,1% in the total Flemish population).

HEAVY MEDIA OMNIVORE
(19,4%)

Heavy Media Omnivores are strongly related to the Media Omnivores from digiMeter 2014, but outdo them in everything to do with media and technology. Both in owned devices and subscriptions and in terms of frequency of use, this segment clearly dominates all other profiles. Heavy Media Omnivores use a mix of traditional and new media, but really live up to their all-devouring reputation when it comes to new media. Just like last year, this segment is also quite willing to pay for this wealth in media.

SOCIO-DEMOGRAPHIC

This segment holds slightly more men (54,9%) than women (45,1%). The Heavy Media Omnivore is mostly between 20 and 49 years old (70,0%). White-collar workers (36,2%) and students (21,8%) are strongly represented. This profile has a lot of higher-educated members (42,0% obtained at least a Bachelor's degree), and high household incomes (59,4% have a household income of at least €3.000 per month; 12,1% even of €5.000 per month).

In 55,1% of cases, Heavy Media Omnivores live with their partner (possibly married and/or with children). As students and people in their early twenties form an important part of this group, we notice that a significant part (26,2%) still lives with at least one of their parents.

TELEVISION

Over four in ten Heavy Media Omnivores have a Smart TV at home (43,7%). They also use them Smart: 84,8% within this segment use apps on the Smart TV (versus 74,7% in the total Flemish population). This is not their only TV-related hardware: DVD or Blu-ray players (85,0%), TV-connected hard drives like NAS systems (40,8%) and media streamers like Google Chromecast (16,0%) or Apple TV (14,5%) are more common here than in an average family in Flanders (70,7%, 22,9%, 7.0% and 5,7% respectively).

In terms of connections, this segment is a glutton as well. In addition to a digital television subscription, 53,3% also subscribed to a paying service (including 27,3% with a Netflix subscription).

Heavy Media Omnivores watch television more frequently across all devices than the average Flemish person. 71,4% watch at least one hour of television via the TV screen every day, 23,6% do so via laptop, 16,7% via tablet and 17,1% via smartphone (versus 64,4%, 13,1%, 5,6% and 8,2% respectively in the total Flemish population). More than half of Heavy Media Omnivores watch television programs live every day (52,1%), but more than in other segments, this is supplemented with a flexible layer of timeshifted viewing (36,2%), streaming (22,8%), movies/series on demand (15,7%) and downloads (11,5%).

Almost every Heavy Media Omnivore used the Internet while watching television in the past month (94,4%). This segment also accounts for the largest number of opinion makers, with 45,6% airing their opinion about a television program through an online channel (most often Facebook and Twitter) in the last month.

COMPUTER

Heavy Media Omnivores have a very high adoption rate for laptops (93,8%) and desktop computers (61,6%). They also use these devices more frequently than any other profile: 54,1% use a computer at least five hours a day, 32,1% even more than eight hours (versus 28,3% and 14,9% in the total Flemish population).

This profile uses the computer on a daily basis for both functional and professional reasons (email, information, office applications) and for recreation and entertainment (social media, gaming, news, downloading or streaming music, movies or series). Content is mostly streamed through legal (paying) channels, while downloading is often done illegally.

TABLET

Almost every Heavy Media Omnivore has a tablet at their disposal (99,7%) and only 1,7% do not use the tablet personally. For 48,2% of the tablet owners within this segment, the tablet is a personal belonging, hardly shared with others.

This segment has the highest concentration of Apple enthusiasts. Over six in ten Heavy Media Omnivores with access to a tablet report that the tablet most used is an iPad (61,8%), versus 50,3% in the total Flemish population of tablet owners.

The Heavy Media Omnivore also uses the tablet more often than any other profile. Almost half of them indicate that they use the tablet at least one hour per day (47,3%), versus 31,2% across all segments. This high-frequency use has again been linked to a multitude of applications ranging from functional applications such as email to entertainment applications such as games and social media.

TELEPHONY

Just like the Online Media Masters and the Professional Explorers, all Heavy Media Omnivores own a smartphone. Like with the tablet, we find a higher-than-average share of Apple devices (40,7% versus 31,9% in the total Flemish population), while Android is keeping the upper hand (49,9%).

Almost half of the Heavy Media Omnivores use their smartphones for at least three hours per day. Just like with the computer and the tablet, they do so for a variety of daily activities. In terms of messaging, this segment dominates all other segments. They also show the smallest gap between daily use of text messaging (74,9%) and daily use of over-the-top messaging services (67,2%). Facebook Messenger and WhatsApp are scoring especially well compared to other segments.

SOCIAL MEDIA

In terms of social media, Heavy Media Omnivores are a real credit to their name. Almost everybody in this segment logged into at least one social network in the past month. Over nine in ten are active monthly users of Facebook (92,9%), YouTube (60,1%) and Twitter (44,8%). In intensity as well, the Heavy Media Omnivore leaves behind all other segments. 52,1% of them use Facebook and 16,8% Twitter for at least one hour every day, compared to 43,8% (Facebook) and 12,1% (Twitter) in the total Flemish population with accounts for these networks.

GAMING

When it comes to game consoles, Heavy Media Omnivores have the highest adoption rates across all segments: 61,2% have a game console at home, nearly doubling the total Flemish population score (33,5%).

Almost every Heavy Media Omnivore played a digital game on some kind of device in the past month. The most popular devices to do so are the smartphone (72,0%) and the tablet (70,1%).

Almost one in three Heavy Media Omnivores plays games for at least one hour per day (32,5%), compared to 24,0% of gamers in the total population.

TRADITIONAL MEDIA

75,3% of Heavy Media Omnivores listen to the radio everyday. Even though this is higher than the Flemish average (73,9%), we see that other segments like Professional Explorers (81,6%) and Traditional Media Fans (77,7%) have more daily listeners.

The use of online music channels does however correspond with the Heavy Media Omnivore's reputation. Over nine in ten use these every month, compared to almost six in ten in the total Flemish population. Three channels stand head and shoulders above the others: YouTube (67,1%), Spotify (50,4%) and iTunes (49,4%). About 12,3% is testing the recently launched Apple Music. The Heavy Media Omnivore does not mind paying for these services: 56,1% have paid for online music in the past month.

In news consumption, Heavy Media Omnivores use a mix of traditional and new media, yet we see them excelling in consumption through digital devices (smartphone, tablet and computer). Other segments score higher in their daily use of more traditional sources like newspapers, television and radio.

GENERAL MEDIA

Considering the intensive use of online media and the high number of Netflix subscriptions, it should not come as a surprise that 16,8% of Heavy Media Omnivores have recently upgraded their Internet subscription.

Wearables are not at all unseen within this segment: as many as 20,6% of Heavy Media Omnivores own a wearable today. These are mainly smart sports watches (8,8%), smart wristbands (7,6%) and smart watches (7,5%).

Like with Online Media Masters and Professional Explorers, Heavy Media Omnivores see their smartphones as their most indispensable media device.

Heavy Media Omnivores are most familiar with storing data in the cloud across all segments. Over eight in ten report that they use an online storage service every month (versus 49,1% in the total Flemish population). Dropbox (47,7%), Google Docs/Google Drive (35,3%) and iCloud (29,6%) are cloud storage services frequently used within this segment. Remarkably, 40,0% of Heavy Media Omnivores also email files to themselves instead of using services like Dropbox.

PROFESSIONAL EXPLORER
(16,2%)

Professional Explorers mainly come from the higher-educated, active population (30-59 years old, relatively high representation of white-collar workers, civil servants, management and the self-employed). They come into contact with digital media through their jobs. This explains the relatively high frequency of use for office applications across devices and the remarkably high popularity of LinkedIn within this segment. Professional Explorers also bring their workplace habits into their leisure time.

Professional Explorers often use mobile devices to follow the news and frequently make use of online music channels (paying or free). Traditional media are still clearly present within this profile, with a higher score for daily radio listening (mainly for listening to the car radio, for example when commuting to work, which fits the professional character of the profile) and a rather traditional approach to television (mainly linear watching on a TV screen).

SOCIO-DEMOGRAPHIC

The Professional Explorer segment has an almost equal amount or men (52,8%) and women (47,2%). They are typically highly educated (38,9% have at least a Bachelor's degree) and part of the active population. Two-thirds of Professional Explorers are aged between 30 and 59. The segment also has a relatively high number of white-collar workers, civil servants, management and the self-employed. Professional Explorers have a medium-to-high household income (55,9% have a household income above €3.000 per month).

Three quarters of the Professional Explorers are married or living together with their partner. Most of those also have children.

TELEVISION

The Professional Explorer seems to be a mix of the Digital Explorer and the Media Omnivore from digiMeter 2014, which immediately becomes apparent looking at the consumption of television content. Just like last year's Media Omnivores, the Professional Explorer has a high adoption rate of Smart TVs (36,4%) and media streamers like Google Chromecast (8,3%) and Apple TV (8,9%). They are perfectly willing to pay for content (14,1% have a Netflix subscription and 11,7% a sports channel subscription). Professional Explorers (just like last year's Digital Explorers) continue to watch TV in a traditional way. Over six in ten watch at least one hour of TV on the television set. Weekly TV watching via laptop (17,6%) or smartphone (8,2%) is lower than in the total Flemish population (27,8% and 15,8% respectively), but slightly higher for tablets (17,0% versus 14,3% in the total Flemish population). Considering the strong position of tablets within this profile, this shouldn't come as a surprise (see below). TV programs are mainly watched live (daily for 62,6%) and less frequently delayed (28,1% watches a recorded show every day).

Eight in ten Professional Explorers have surfed the net while watching TV in the past month (versus 69,9% in the Flemish population).

COMPUTER

Over nine in ten Professional Explorers have a laptop at home (91,0%) and over six in ten own a desktop (61,5%). This clearly makes their adoption rates for both devices higher than in the total Flemish population (78,1% and 51,0% respectively). They also enjoy using them. Almost eight in ten report that they use the computer for at least an hour a day (78,1%), significantly higher than in the Flemish population (68,4%). Their daily activities involving computers are diverse, but we do see clear signs of the professional aspects of the Professional Explorer. Functional applications like email, office applications and searching for information score higher than in the total Flemish population. We also see that visiting news sites is more of a routine for Professional Explorers (57,2%) than for the average Flemish person (50,2%).

Professional Explorers are no big streamers or downloaders of content. When they do download or stream, they mainly do so legally.

TABLET

Each Professional Explorer has a tablet and uses it personally, unshared with other household members. Seven in ten use it daily (versus 53,0% in the total Flemish population). We mainly see functional and professional applications like email and finding information, and notice that Professional Explorers also use their tablet as a daily news source. Considering the professional character of this segment, it shouldn't come as a surprise that they use their tablets outdoors more often and that the share of tablets obtained via an employer (13,9%) is markedly higher than in the total Flemish population (6,3%).

TELEPHONY

Almost every Professional Explorer has a smartphone (99,3%) and they tend to use it every day (94,3%). A quarter of the segment uses it for over three hours a day. Again, the smartphone is used mainly professionally (email and finding information) and was obtained via the employer in 20,0% of the cases (versus 9,2% in the total Flemish population).

SOCIAL MEDIA

Social media are by no means unfamiliar territory for the Professional Explorer. Three in four have used Facebook in the past month. Media use, however, is again highly professionally inspired. Over a quarter of Professional Explorers have a LinkedIn account (27,2%), while this is only 19,4% for the total Flemish population. Even though Professional Explorers are familiar with social media, they are not its most frequent users. Segments like Online Media Masters and Media Omnivores find social media much more important.

GAMING

Professional Explorers aren't the biggest gamers. Not only is their adoption of game consoles (26,5%) far below the Flemish average (33,5%), only 27,2% report that they have played a digital game in the past month (versus 55,1% in the Flemish population). If they have played a game, it was most likely on a tablet (14,2%).

TRADITIONAL MEDIA

Professional Explorers are the most avid radio listeners: over eight in ten report that they listen to radio on a daily basis. This high figure can mainly be attributed to the car radio. 65,4% listen to the car radio every day. Again, this could be a result of the professional character of the Professional Explorer, who commutes to work every day.

Besides radio, the Professional Explorer enjoys online music channels as well. iTunes (30,2%) and Spotify (26,9%) stand out; services the Professional Explorer is more than happy to pay for. Three quarters of the Professional Explorers using iTunes have paid for this service and 32,0% with a Spotify account have a paid subscription. These rates are higher than in the total Flemish population (66,3% and 25,3% respectively).

The Professional Explorer likes to stay informed of what is happening in the world and uses both traditional (national television, radio and newspapers) and mobile media (smartphone and tablet) to do so.

GENERAL MEDIA

Wearables are still very much on the rise. With 7,0% of Professional Explorers owning a wearable today, their adoption rate aligns with that of the total Flemish population. The most common wearables are smart sports watches (3,8%) and smart wristbands (2,6%).

Even though the tablet seems to be playing a more crucial part in the lives of Professional Explorers, they see their smartphones as more indispensable (31,3%, versus 14,8% for the tablet).

Considering the professional character of this segment, it should come as no surprise that the Professional Explorer is familiar with storing data, both in physical storage and in the cloud. Nearly six in ten Professional Explorers have used an online data storage service (58,4%), versus 49,1% in the total Flemish population. Dropbox (33,3%) is particularly popular here.

PLAYFUL EXPLORER
(13,5%)

Playful Explorers are usually a bit older and lower educated. They emphasize traditional media but have high adoption rates for tablets and laptops. They use these for functional purposes (email and information) and for gaming. Other forms of tablet or laptop entertainment (downloading/streaming content, news consumption, social media, ...) are yet to be discovered by the Playful Explorers.

SOCIO-DEMOGRAPHIC

Within the Playful Explorer segment, almost two in three are at least 50 years old (63,9%), with a high number of retired people (38,4%). The number of unemployed people (38,4%) is also higher than in other profiles.

This segment counts more women (53,4%) than men (46,6%).

Playful Explorers have a low-to-medium level of education: 72,1% have a secondary school diploma at most.

More than half of the Playful Explorers is either single with no children or married without children (56,6%).

Playful Explorers often have an average income: 48,2% report a household income between €1.500 and €3.000 per month.

TELEVISION

Playful Explorers are still most familiar with traditional media. Watching television is mainly done in the traditional way. In the total Flemish population, 20,1% watch at least three hours of television via television screen. 27,1% of Playful Explorers do so as well. Unlike Traditional Media Fans, Playful Explorers are slowly building a layer of 'new screens' on top: 24,4% watch video content via computer and 10,9% via tablet every week. While this is still below the Flemish average (27,8% and 14,3% respectively), it seems Playful Explorers are slowly testing new channels to enrich their TV experience.

The Playful Explorer enjoys the possibilities of digital television. Besides the 65,8% who watch live TV every day, 41,0% watch recorded programs every day as well. The rate for delayed viewing in particular is a good deal higher than the Flemish average. Features like the electronic program guide, skipping ads and recording programs are more frequently used. Considering the high frequency of both live and delayed watching, this is no surprise.

The use of Internet whilst watching TV is just below the Flemish average (67,4% reports that they do this every month, versus 69,9% in the Flemish population).

COMPUTER

Almost eight in ten Playful Explorers have a laptop at home. Most Playful Explorers use it between one and five hours every day (63,7%).

Playful Explorers aren't the biggest content streamers or downloaders. When they do download or stream, they mainly do so legally. The Playful Explorer does use illegal sources to download series or movies.

Besides the frequent use of functional applications like email or finding information, Playful Explorers game a lot. 27,5% report that they game on the computer every day, compared to 17,5% in the Flemish population. Only the Heavy Media Omnivores have an equally high computer gaming frequency (28,1%).

TABLET

Playful Explorers own a tablet more often (62,7%) than the average population (58,3%). In many cases, this is an iPad (44,6%). Their adoption rate of tablets might not be the highest across all segments, but Playful Explorers do have the highest rate for owning a (almost exclusively) personal tablet (56,1%). Over half the Playful Explorers with access to a tablet use it daily (56,1%). It is again worth noting that the tablet is seen as a gaming platform more than in other segments, besides using it for emails and finding information.

TELEPHONY

In telephony, the Playful Explorer is traditional. Adoption of a landline (82,2%) and cellphone (83,8%) is very high, while only 25,6% owns a smartphone. When Playful Explorers do own smartphones, they use it rather infrequently. Only 22,5% of the Playful Explorers with smartphones use it everyday. Not many of them send out messages (text messages or over-the-top services) every day.

SOCIAL MEDIA

The Playful Explorer has an average social media use, and social media is almost synonymous with Facebook. Two in three have used Facebook in the previous month. Playful Explorers with a Facebook account don't use it as daily (66,0%) as the average Flemish Facebook user (80,0%).

GAMING

While gaming is important in the digital media consumption of the Playful Explorer, this doesn't lead to a higher adoption of game consoles than other segments. On the contrary, only 21,5% of Playful Explorers have a console at home, far below the Flemish average (33,5%).

Playful Explorers mainly use two devices to play games: 59,7% report that they have played a game on the computer in the past month (versus 31,2% in the total Flemish population) and 32,5% on the tablet (versus 22,3%).

As much as 86,2% of the segment played a digital game in the past month, a lot more than the Flemish average (56,1%).

Playful Explorers are not the biggest binge gamers. Only 21,9% of gaming Playful Explorers play at least one hour a day. To compare: in the Flemish population, 24,0% of monthly gamers do so for at least an hour a day.

TRADITIONAL MEDIA

Listening to the radio is not exactly a distinguishing feature of Playful Explorers. Less than seven in ten listen to the radio every day (68,6%), versus 73,9% in the Flemish population. Listening via the traditional radio set does score relatively high (55,1% does so daily), but remarkably few Playful Explorers listen to the car radio on a daily basis (38,9% versus 50,6% in the Flemish population).

Online music channels cannot (yet) charm the Playful Explorers. 43,8% indicates listening to music via Youtube, but that's about it.
To follow the news, the Playful Explorer mainly relies on national television (66,5%). A remarkably low number of Playful Explorers uses the tablet to consume news (15,2% versus 19,3% in the total Flemish population).

GENERAL MEDIA

Just like Traditional Media Fans, Playful Explorers are rather steady and rarely change their telecom connections.

Playful Explorers are still taking their first steps into the digital world. It should come as no surprise that their adoption of wearables is very low (1,7%).

Besides their television set (32,9%), laptop (20,3%), GSM (15,8%) and desktop (15,4%) form the most necessary technologies for the Playful Explorer. The tablet, surprisingly, comes in fifth (8,1%), which is still higher than in the total Flemish population (5,8%).

Using cloud services to store data is less common for the Playful Explorer. Only 39,8% of them used a cloud storage service in the past month, versus 49,1% in the Flemish population.

TRADITIONAL MEDIA FAN
(24,9%)

The Traditional Media Fan is the eldest profile and a merging of two segments of last year: the Analogue Media Fans (heavily focusing on traditional, analogue and offline media) and the Functional Media Users (which did have a computer and Internet at home, but only used it when needed). This mix is clearly noticeable in the media consumption pattern of this segment. Traditional Media Fans rarely come into contact with new media. When they do have a computer and Internet at home, these have purely functional purposes (like emailing and searching for information), and rarely as a source of entertainment or recreation. The Traditional Media Fan prefers to watch (linear) television or listen to the radio.

SOCIO-DEMOGRAPHIC

Over half of the Traditional Media Fans are at least 65 years old (56,3%). Unsurprisingly, this segment holds the most retired Flemings across all segments (60,4%).

The segment has slightly more women (57,2%) than men (42,8%).

Traditional Media Fans are mainly lower educated: 89,8% have a secondary-school diploma at most. Over one in three has no degree or just a primary-school diploma (34,4%).

Almost eight in ten live in a household with no more than two members.

Over one in three (35,0%) prefers not to say what the net household income is, by far the highest number across all segments. For the Traditional Media Fans that did indicate their net household income, it was less than €2.000 per month for 62,6%.

TELEVISION

Traditional Media Fans have the highest adoption of classical tube TV sets (22,5% of Traditional Media Fans only have a classical tube TV as a television screen at home, compared to 8,6% in the total Flemish population). The adoption of Smart TVs is the lowest for this segment (12,0% versus 29,2% in the total Flemish population). It is worth noting that this is the only segment where the adoption of the classical tube TV is still higher than the adoption of Smart TVs. Media streamers like Apple TV or Google Chromecast are rarely found at Traditional Media Fans' homes.

Watching television is very straightforward for the Traditional Media Fans: linear, via television screen, with no distractions from other devices. And they do it often: Traditional Media Fans are the most frequent television watchers. 29,3% of Traditional Media Fans watch at least three hours of television per day; other screens like computer, tablet or laptop are rarely used to watch video content. Almost seven in ten watch television programs live every day (the highest of all segments), while only 28,9% report that they use the Internet while watching television (versus 69,9% in the Flemish population).

COMPUTER

Within the Traditional Media Fan segment, 67,7% have a computer at home and 69,9% an Internet connection. This means computers and Internet connections are no exceptions in the households of Traditional Media Fans, but adoption is still far below the Flemish average (with 90,1% owning a computer and 91,2% an Internet connection).

The usage of computers is also very low. Only 25,0% of Traditional Media Fans report using their computer for at least one hour per day, versus 68,4% in the total population. The daily use of a computer is often limited to functional applications like reading and sending emails (38,7% and 31,8%) and finding information (25,0%). Using a computer for entertainment (gaming, videos, social media or music) does not suit Traditional Media Fans at all.

TABLET

This segment has the lowest tablet adoption: just 16,8% has a tablet at home (compared to 58,3% in the total population) and Traditional Media Fans are not commonly planning to buy one in the near future: 85% are not at all considering to buy a tablet in coming 12 months.

Not just the adoption is low; usage of tablets is also very limited. Only 19,8% of the Traditional Media Fans who do have access to a tablet actually use it daily. In the total Flemish population, 53,0% of the tablet owners use it every day.

TELEPHONY

The functional nature of the Traditional Media Fan can be seen when it comes to telephony as well: a phone is for making phone calls, no more, no less. Landlines (72,3%) and GSM (79,9%) are often found within this segment, but smartphones are rather exceptional (14,0%). Those who do own a smartphone actually use it as a regular GSM: calling (33,9% daily) and texting (44,0% daily) does happen, but over-the-top messaging is not very common (7,1% daily).

SOCIAL MEDIA

Social media are still largely uncharted territory for Traditional Media Fans: 66,3% never had a social media account. The only social network Traditional Media Fans use relatively often, is Facebook (22,2%), even though nearly half of them do not use it every day (45,9%).

GAMES

Based on the previous paragraphs, it will come as no surprise that playing digital games is not exactly a hobby of the Traditional Media Fan. Only 7,5% have played a game in the past month (versus 55,1% in the total Flemish population).

TRADITIONAL MEDIA

Traditional Media Fans like to listen to the radio and do so often. 77,7% do so daily (on any device) compared to 73,9% in the total population. This radio consumption mostly takes place at home via traditional radio (65,9%).

Listening to music online is not something the Traditional Media Fan will easily do. Only 17,7% used an online music channel in the past month (versus 59,5% in the total Flemish population), and this channel was mostly limited to Youtube (15,2%).

The news is also something Traditional Media Fans mainly look for in traditional media. 71,4% of them follow the news on national television every day, 66,2% follow the news on the radio and 41,7% read the newspaper every day to stay informed. All of these numbers are higher than in the total Flemish population (56,8%, 58,9% and 31,5% respectively).

GENERAL MEDIA

Traditional Media Fans are very steadfast and very rarely change something about their telecom connections. It will not surprise anyone that Traditional Media Fans are not very concerned with wearables.

Considering their cautious attitude towards the Internet and new media, it is no surprise that 54,0% have no preference as to which Internet device to purchase next. It will be equally unsurprising that their number one essential technology is the television (60,1% versus 28,7% in the total Flemish population).

DIGIMETER PROFILES