www.imec.be/digimeter

digimeter 2016

measuring digital media trends in Flanders

imec

embracing a better life

Authors: Bart Vanhaelewyn, Lieven De Marez
Data collection & field work: Koen Vervoort, Pauline De Wolf
Project management: Greet Pauwels, Evelyne Blancke, Trees Accou
Infographics & interactive data visualization: Nils Blanckaert (simplechaos.be)

For more details about the report, or additional analysis on the data,
please contact Bart Vanhaelewyn (bart.vanhaelewyn@imec.be).

Project Director: Prof. dr. Lieven De Marez (lieven.demarez@ugent.be)

TABLE OF CONTENTS

LIST OF FIGURES AND TABLES

GENERAL ADOPTION

SOCIO-DEMOGRAPHICS

DEVICES & CONNECTIONS

TV & VIDEO

RADIO & MUSIC

NEWS CONSUMPTION

SOCIAL MEDIA

MESSAGING & COMMUNICATION

GAMING

GENERAL MEDIA

DIGIBESITY

PREFACE

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

The primary research goal of digimeter is as follows:

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

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

> By carrying out the digimeter survey on a yearly basis and by including recurring respondents as well as a substantial amount of new people with each wave, the digimeter project allows imec to build and refresh a database containing detailed user profiles of end users who agree to be involved in further innovation and user research (i.e. living lab research facilitated by imec.livinglabs). This user database is available for SMEs, organizations and larger companies, for research in collaboration with imec.livinglabs. Management of the digimeter user panel is handled by the panel management staff of imec.livinglabs[3].

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.

Over the course of 7 weeks in August and September 2016, digimeter researchers enquired respondents from all over Flanders through recruitment events in large and small cities. As part of the recruitment exercise, interviewers visited markets, libraries, public parks, shopping streets, local markets, music festivals, events for people aged 55+, senior citizens' associations, nursing homes and local pubs.

Recruitment events were set up in Ghent, Antwerp, Tielt, Kortrijk, Hasselt, Leuven, Kortenaken and Stekene.

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

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 habits and media and technology practices, creating this report would not have been possible.

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

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

[3] Panel management can be contacted through panel@imec.be

METHODOLOGY

Each year, 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, ICT and technology.

- This is the 9th 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[4]. The total dataset is weighted based on these variables.
- In the period of August to September 2016, 2.164 individuals completed the survey. Responses from 1.352 participants (or 62,5% of the total sample) were collected offline by means of (tablet) computer-assisted personal interviews (CAPI) or paper and pencil interviews (PAPI). 812 respondents (or 37,5%) filled out the survey online (computer-assisted web interview or CAWI).
- The survey consists of 8 thematic chapters: Devices & connections, TV & video, Radio & music, News, Social media, Messaging & communication, Gaming and General media. Depending on their answers, respondents are directed to additional questions concerning applications and other information regarding these technologies and media types. In this way, digimeter provides quantitative insights into the adoption and use diffusion of (new) media and technology. The survey concludes with a list of socio-demographic questions.
- Just like in previous waves, this report includes a segmentation of the Flemish population. A K-means cluster analysis was performed based on 7 variables measuring the variety of use and 12 variables measuring the frequency of use to construct 4 segments.
- Digimeter provides a snapshot view of the adoption and use of media, ICT and technology. It is based on the self-reporting of media and technology consumers. As such, the results should be interpreted as the perception respondents have of their own media consumption. The methodology does not allow for assumptions regarding the effective media reach.
- The survey investigates the adoption of devices within households: who has access to a device or service within a household? It does not measure personal ownership of a device (except for mobile phones), nor does it make assumptions about household level (how many households own a device or subscription to a service). The latter would imply completely different data gathering and quota sampling methods.
- The evolution regarding the previous wave is expressed by means of percentage points (the absolute difference between two percentages). For instance: when adoption increases from 20% to 30%, there is an increase of 10 percentage points. Expressed as a (relative) percentage, the same growth would represent an increase of 50% (because to get from 20% to 30%, an increase of half the value of the starting point is needed).
- All respondents had an equal chance of winning a voucher ranging from €10 to €500 in value. The total amount of all vouchers combined was €2.000.

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

GENERAL ADOPTION

MEDIA & ICT ADOPTION IN FLANDERS - 2009 TO 2016

The general trends in adoption of media and ICT that have characterized the last couple of years seem to continue in 2016. In a landscape characterized by the sluggish adoption of media and ICT devices, the smartphone continues to gain users at a quick pace. Fueled by the increased awareness of health applications, smart wearables are on the tipping point of gaining 'critical mass' in Flanders. 13,2% of the Flemish population claims ownership of a smart wearable, with smart sports watches and fitness trackers/smart wristbands being the most popular type of smart wearable (moving past smartwatches).

The adoption of computers remains stable, with 90,7% of the Flemish population having access to a laptop and/or desktop computer within their household. The gap between portable and desktop computers in terms of adoption is still widening: while the adoption of laptop computers fluctuates around 80% of the Flemish population since 2012, we see that fewer and fewer Flemings have a desktop computer at home (44,2%, again a decline of 6,9 percentage points compared to last year).

Like in previous years, 1 in 3 Flemings claim to have access to a game console (35,2%, +1,7 percentage points). The fixed game console (which is connected to a TV screen) is by far the most popular type of console (31,6%). 1 in 6 Flemings have a portable game console such as Nintendo DS or PlayStation Vita (16,5%).

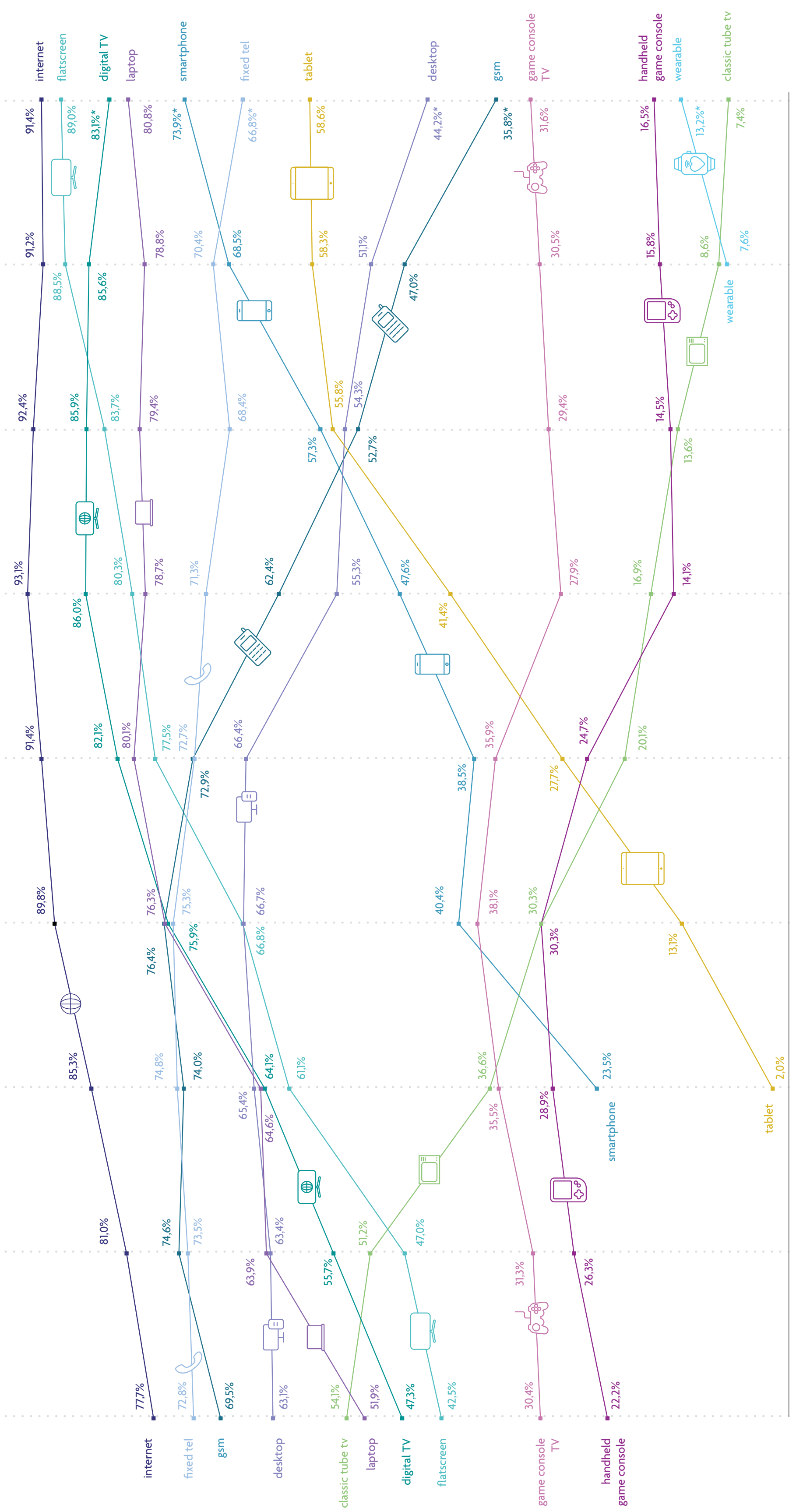
In 2015, we saw double digit growth of tablet adoption come to a stop for the first time. In 2016, nothing changed about that. With almost 6 in 10 Flemings having access to a tablet within their household (58,6%), the adoption of tablets remained at the same level as last year (58,3%).

This is in stark contrast to the ever-increasing adoption of smartphones in Flanders. Today, almost three in four Flemings have a smartphone (73,9%), a significant increase compared to last year (+5,4 percentage points). The increasing popularity of smart-phones slows down the adoption of 'regular' mobile phones (GSMs). Just over a third of the Flemish population still has a GSM at his/her disposal (35,8%), which is a significant drop compared to last year (-11,2 percentage points). Although the adoption of landline telephone connections is significantly lower compared to last year (-3,6 percentage points), the data indicates that 2 out of 3 Flemings have a fixed telephone line at home (66,8%).

The market of smart wearables is long-predicted to be a fast-booming business, but the adoption has been limited to a niche of innovators thus far. This year, we do see a significant growth (+5,6 percentage points), with 13,2% of the Flemish population having one or more types of smart wearables at their disposal. A growth that is clearly fueled by fitness or health-related motivations (track one's movements, sleeping patterns, and physiological parameters, such as heart rate). This is why the most common types of smart wearables are designed for those health tracking purposes, such as a smart sports watches (6,0%) and smart wristbands (also called 'activity trackers') (4,4%). Smartwatches that also support other functions such as communication apps (e.g. sending/receiving messages), agenda reminders and display notifications from news apps, are less commonly in use (3,8%).

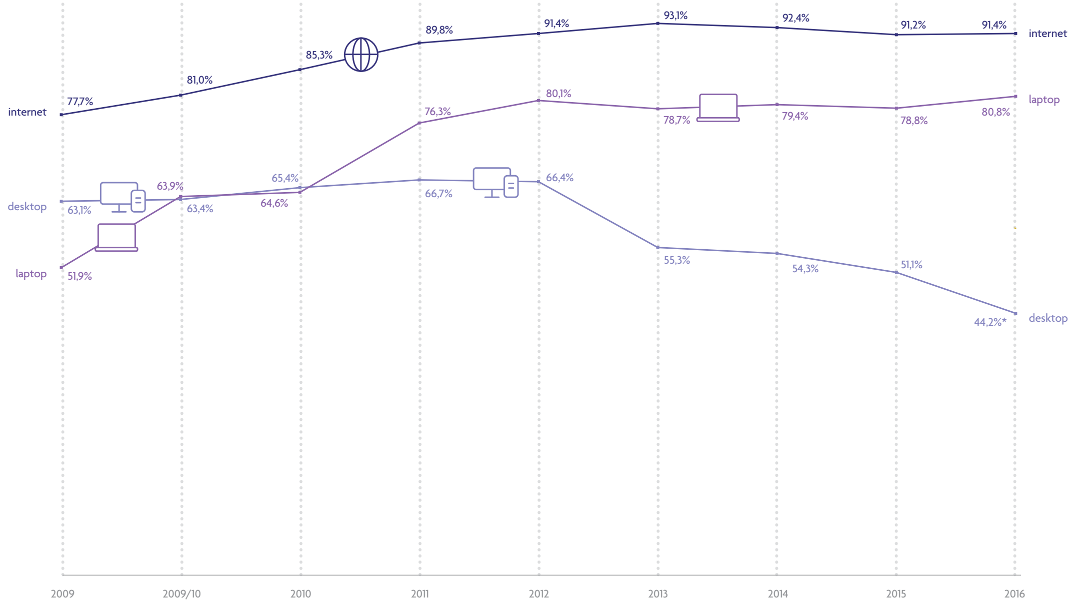
The adoption of television screens remains stable at 96,5% of the population (-0,6 percentage points compared to last year). The vast majority of the Flemish population has a flat screen TV at home (89,0%). The number of Flemings who only have a classic tube TV at home is on the decline. Today, only 7,4% have a classic tube TV at home, while 2 years ago, this figure was still 13,6%.

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



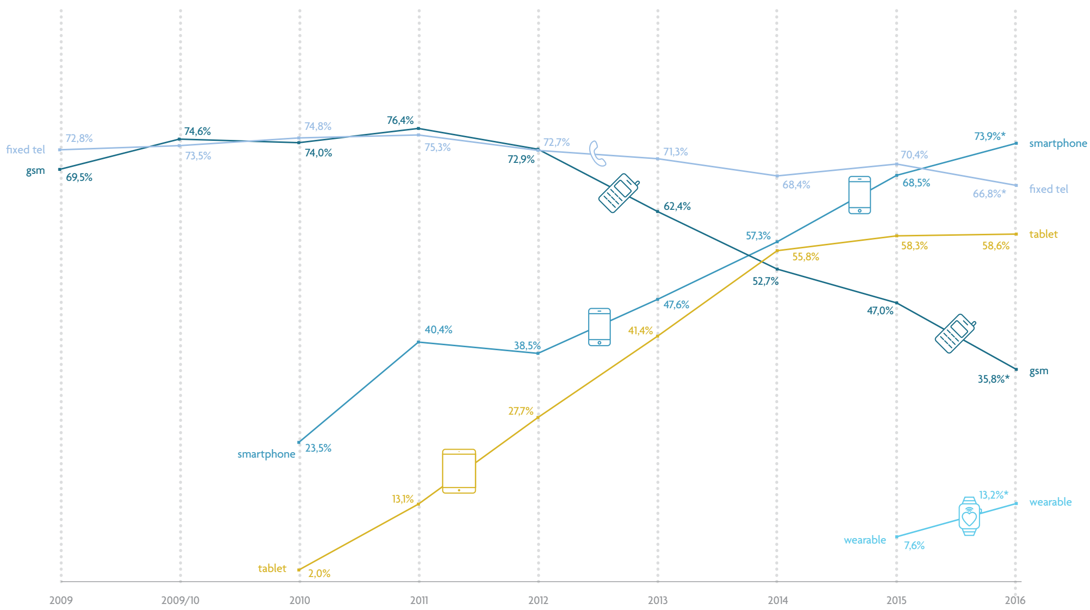
General adoption graph 1: Media & ICT adoption in Flanders - 2009 to 2016 (%)
* Statistically significant change in 2016 compared to 2015
Play with the individual parameters to gain specific insights - Interactive chart available on www.imec.be/digimeter

COMPUTER & INTERNET



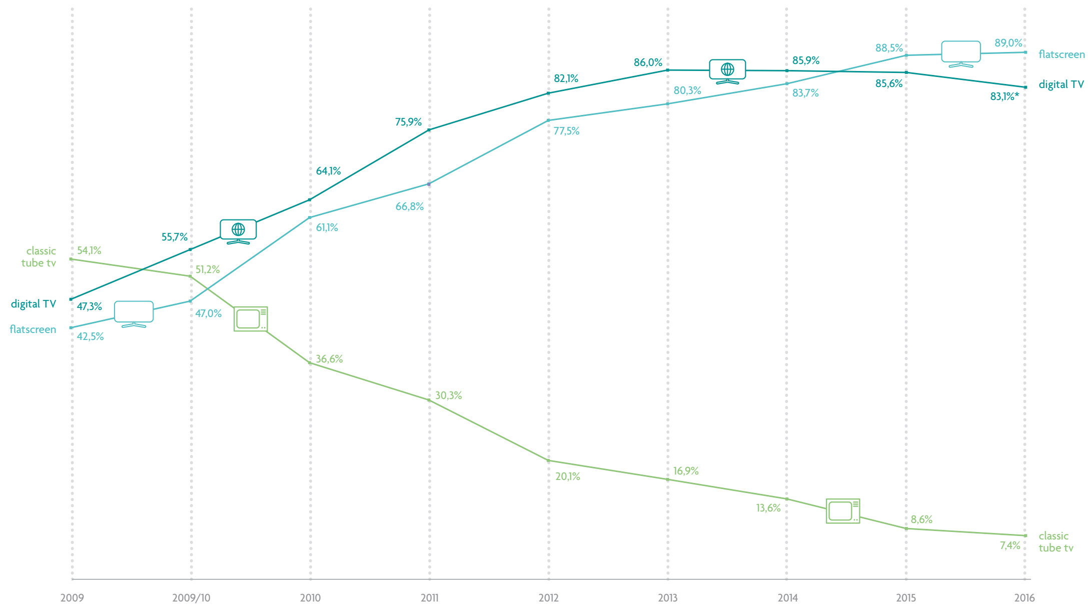
General adoption graph 2: Media & ICT adoption in Flanders - 2009 to 2016 (%)
* Statistically significant change compared to 2015

TELEPHONY & MOBILE



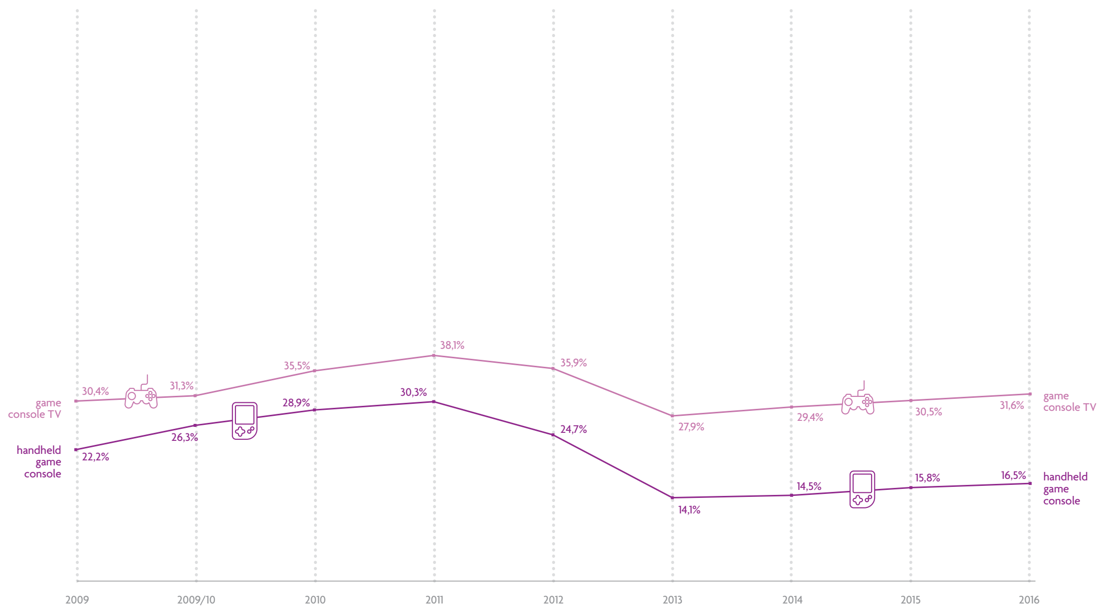
General adoption graph 3: Media & ICT adoption in Flanders - 2009 to 2016 (%)
* Statistically significant change compared to 2015

TELEVISION



General adoption graph 4: Media & ICT adoption in Flanders - 2009 to 2016 (%)
* Statistically significant change compared to 2015

GAME CONSOLE

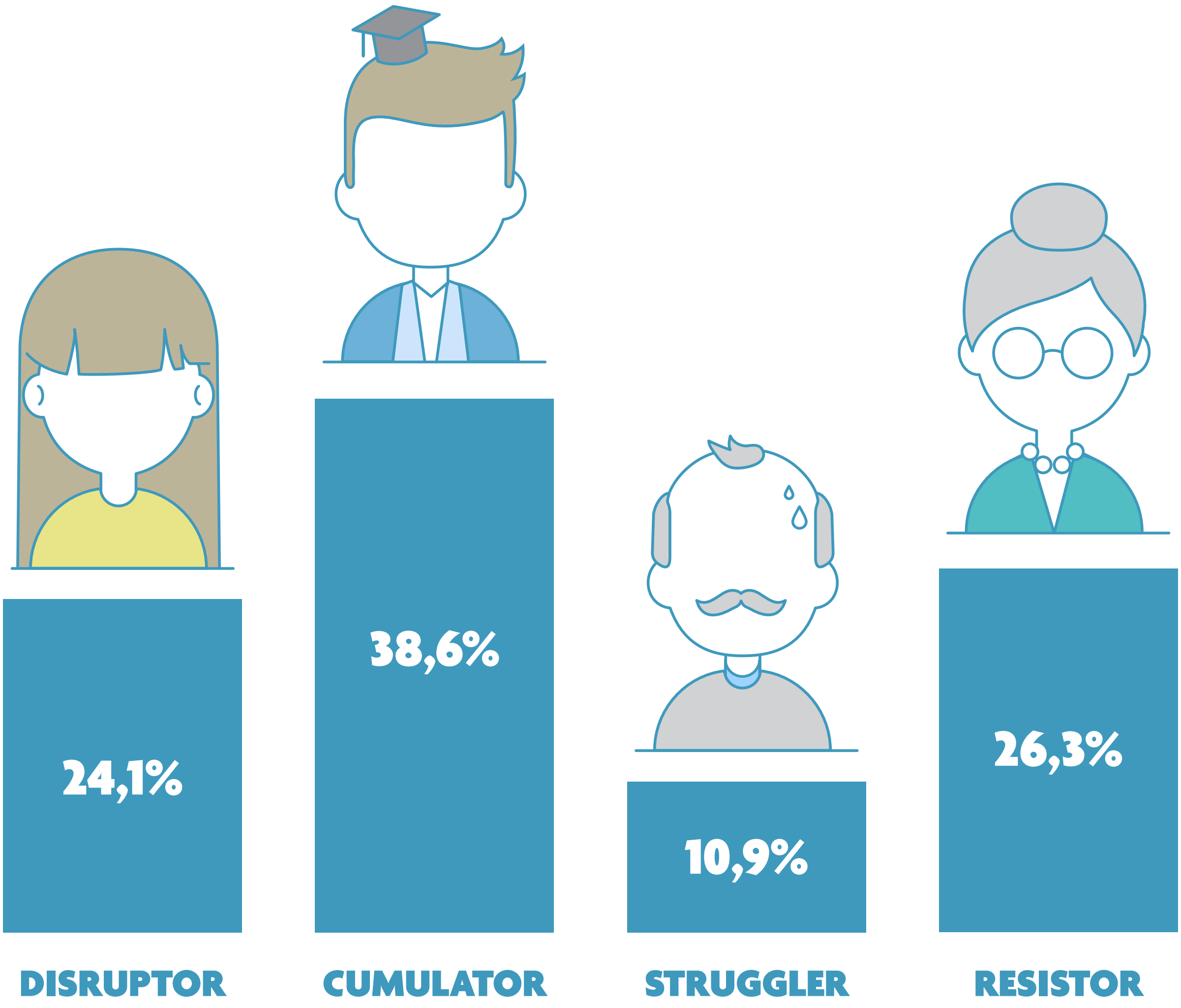


General adoption graph 5: Media & ICT adoption in Flanders - 2009 to 2016 (%)
* Statistically significant change compared to 2015

PROFILES

As in previous years, we have grouped Flemish media and technology consumers into segments. However, the adoption of digital media and technology in Flanders has become so widespread, that the notion of having or not having a computer or smartphone at home is not enough to differentiate between segments. Instead, it is more meaningful to focus on the use of and the attitude towards (digital) media and technology. All segments are digital to some extent, but they differ on how they use digital technology, which role it plays in their everyday life, and how digital media relate to more traditional forms of media.

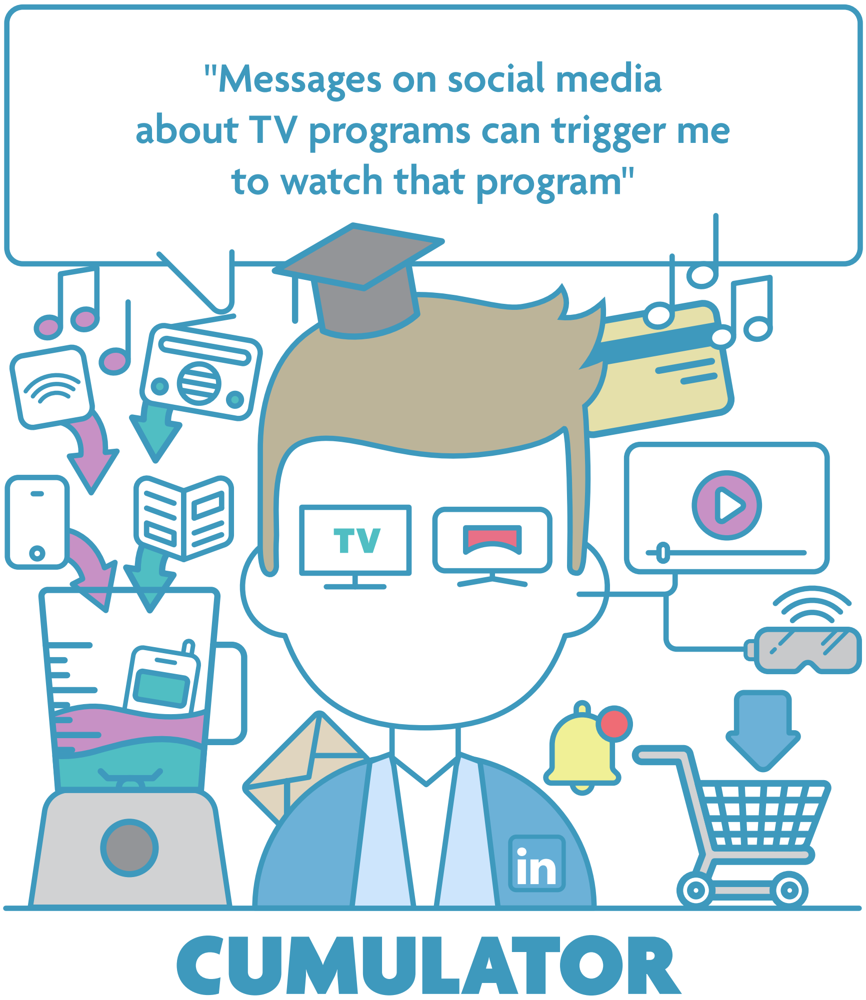
As a result, the 4 segments of this digimeter report are not to be compared with the 5 segments of the previous reports. Although some rough parallels are possible, as will be made clear in the introductions to the segments below.



DISRUPTOR (24,1%)

Disruptors account for a quarter of the population (24,1%), and bear comparison to the Online Media Masters of the previous report. This is the youngest segment, which features the largest share of Flemings who are students and/or younger than 30. For Disruptors, digital media have largely replaced more traditional forms of media. This segment watches online videos more frequently than TV broadcasts, and prefers streaming music online over listening to the radio or a CD. Compared to other segments, Disruptors rely less on phone calls, e-mail and SMS for their everyday communication. Instead, they are the biggest users of messaging apps like Facebook Messenger, WhatsApp and Snapchat. Messaging has not replaced social media, as social networks such as Facebook, YouTube and Instagram remain extremely popular among Disruptors. The smartphone is the core device for this segment, both in terms of adoption rate and frequency of use. There is, however, a downside to this story, as this segment shows a high dependency on both the smartphone and social media.

CUMULATOR (38,6%)



Cumulators are slightly older than Disruptors (typically between 30 and 49 years old), and most commonly live together with their partners (with or without children). They are highly educated and have established their professional careers. This segment, that can be related to the Media Omnivores of the previous digimeter reports, blends the use of digital media and technology with the use of more traditional forms of media. They are as likely to watch online videos as they are to watch traditional live TV programming. They regularly listen to radio broadcasting but are also frequent users of online music streaming platforms. To them, digital media are an addition to traditional media. Overall, they tend to be quite satisfied with the content and services offered by the Flemish broadcasters (TV, radio as well as news media).

These first 2 segments of Disruptors and Cumulators (combined they account for 62,7% of the Flemish population) are segments that are experienced with the use of digital media and technology. Disruptors mainly see digital media as a replacement for traditional forms of media, while Cumulators tend to add digital media consumption on top of the traditional forms they still use. These segments don't struggle with the technology and digital media as such, but rather they struggle with themselves: How can they incorporate the use of digital technology into their personal life, without feeling too dependent on these digital impulses? It may come as no surprise that these segments are most likely to develop a feeling of digibesity, as will be made clear in the chapter General Media.

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

STRUGGLER (10,9%)

Strugglers still mainly consume traditional forms of media, and can be related to the Professional Explorers and Playful Explorers of the previous report. Typical for this segment is the central position of the tablet when it comes to the consumption of digital media. Strugglers show the highest use rates of tablets for watching video content, listening to radio broadcasting, following the news and playing games. To them, a tablet is an ideal companion with which to discover the possibilities of digital media. Strugglers want to explore the possibilities of digital media and technology but often lack the skills and the experience to really develop digital media habits.

RESISTOR (26,3%)

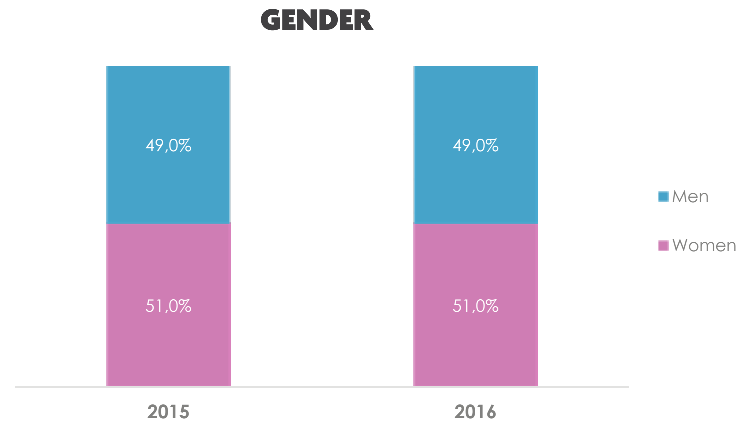
Resistors can be related with the Traditional Media Fans of last year. Stability is a key characteristic of the media behavior of Resistors, as innovations are only slowly accepted by this segment. They are the most averse to the temptation of digital media, and mainly stick to traditional forms of media and technology. This is illustrated by the low adoption and use rate of internet connections, smartphones, computers and tablets. This segment is the least interested in using digital media and technologies, and is the most sceptic about the beneficial influences digital media may have.

SOCIO-DEMOGRAPHICS

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 was performed, the final dataset was weighted according to these variables.

GENDER

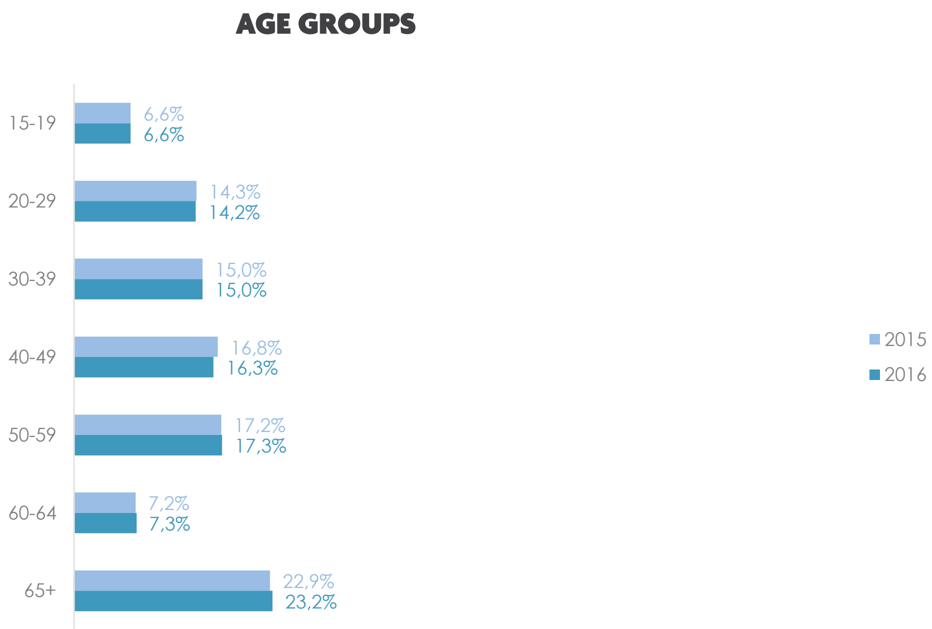
Just like last year, our sample consists of slightly more women (51,0%) than men (49,0%).



Socio-demographic graph 1: Population plotted by gender (N=2.164)

AGE GROUPS

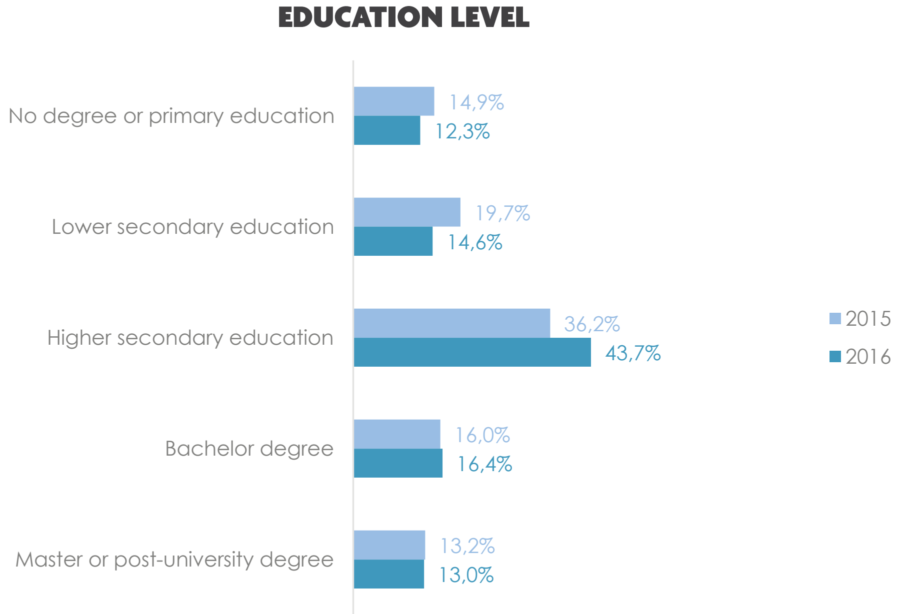
The minimum age to participate in the survey is 15 years old. The sample has been set up according to the age distribution within the Flemish population (based on figures provided by the FPS Economy).



Socio-demographic graph 2: Population plotted by age groups (N=2.164)

EDUCATION LEVEL

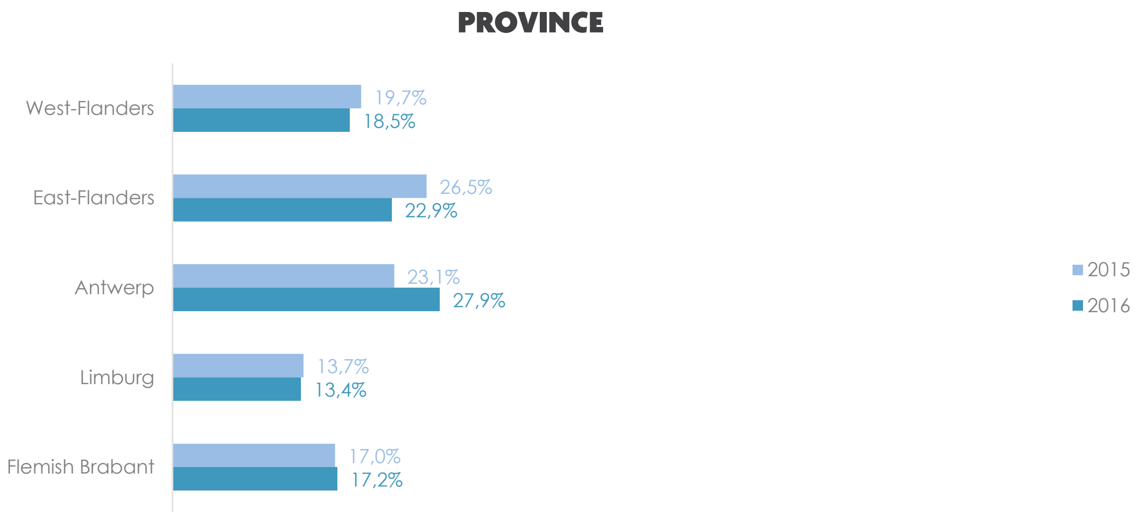
29,4% have a higher degree (16,4% bachelor, 13,0% master or postgraduate degree); 12,3% completed only primary education or hold no degree at all.



Socio-demographic graph 3: Population plotted by education level (N=2.164)

PROVINCE

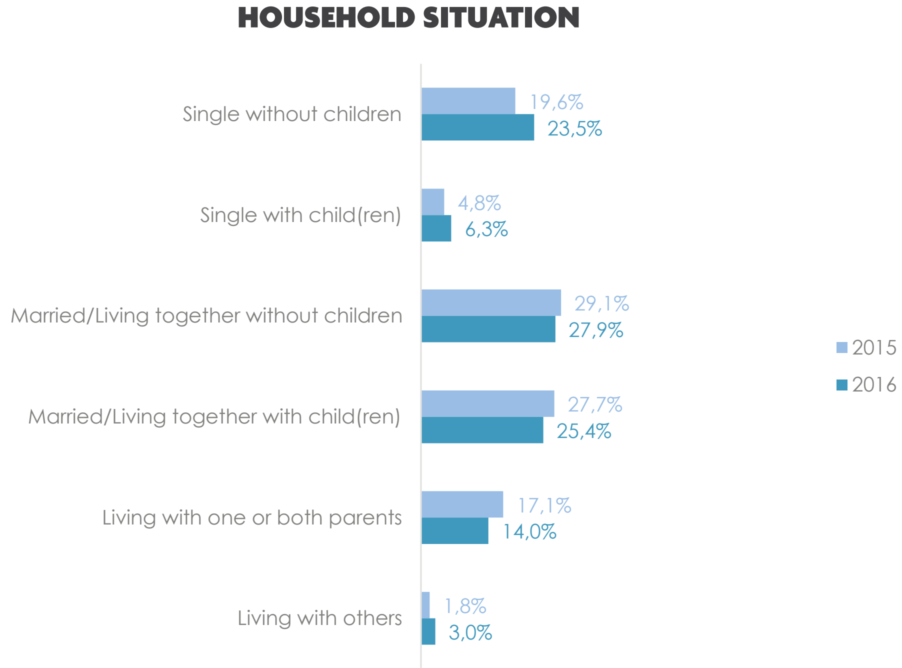
Conforming to the distribution within the total Flemish population (15+), half of the respondents in the sample reside in the provinces of Antwerp (27,9%) or East-Flanders (22,9%).



Socio-demographic graph 4: Population plotted by province (N=2.164)

HOUSEHOLD SITUATION

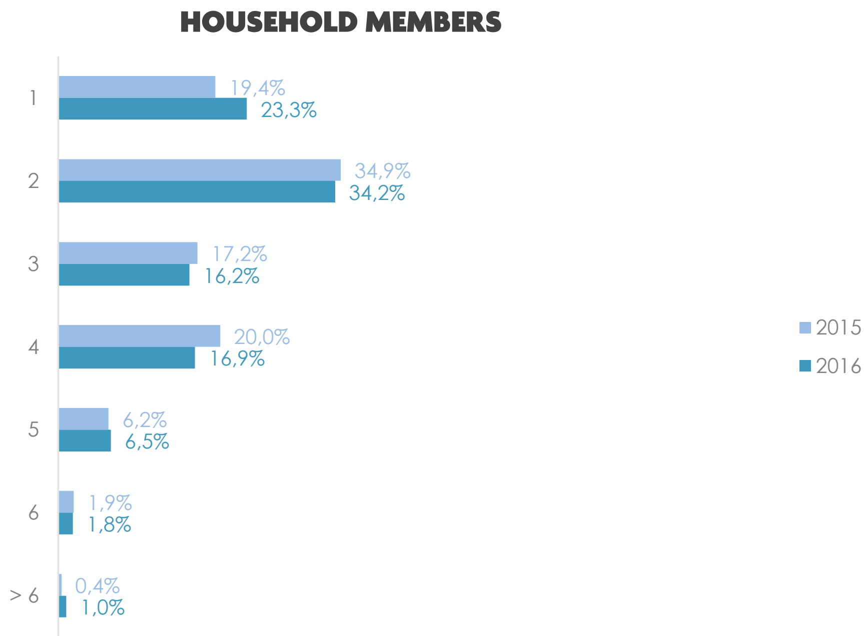
Over half of our sample is married or living together with their partner (27,9% without children, 25,4% with children). The third largest group in the sample is composed of single individuals without children (23,5%).



Socio-demographic graph 5: Population plotted by household situation (N=2.164)

HOUSEHOLD MEMBERS

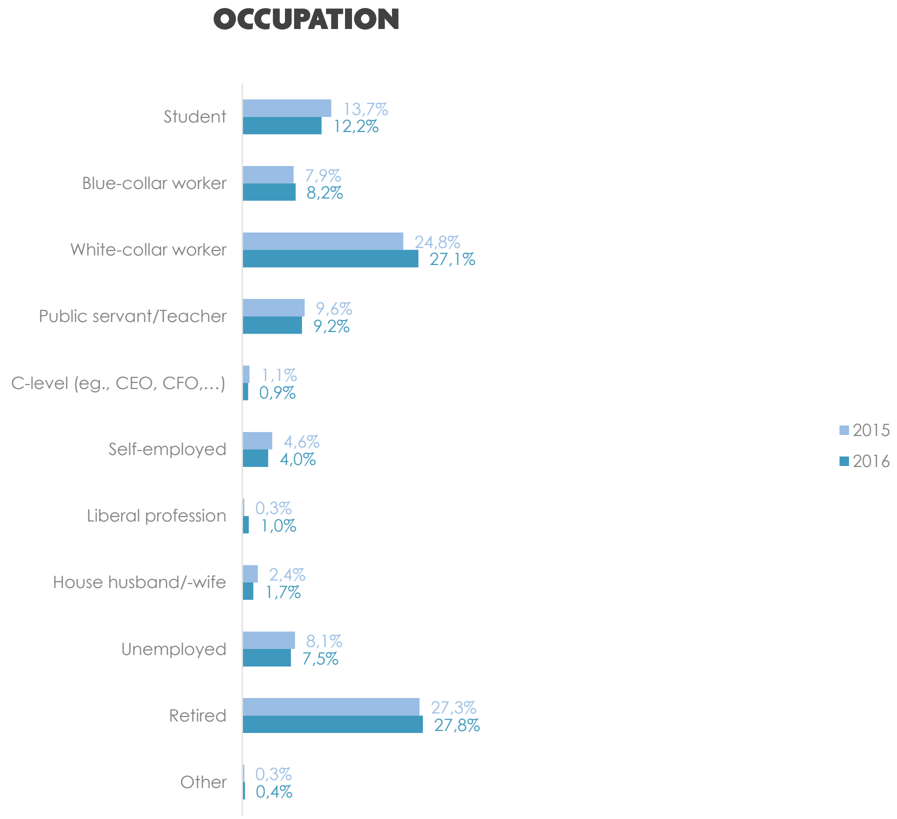
Households consisting of 2 individuals is the most common household constellation in our sample (34,2%). 23,3% of the respondents live on their own, while 26,2% live in households of at least 4 people.



Socio-demographic graph 6: Population plotted by number of household members (N=2.164)

OCCUPATION

The majority of the sample is either retired (27,8%) or working in a white-collar profession (27,1%). 12,2% are students.

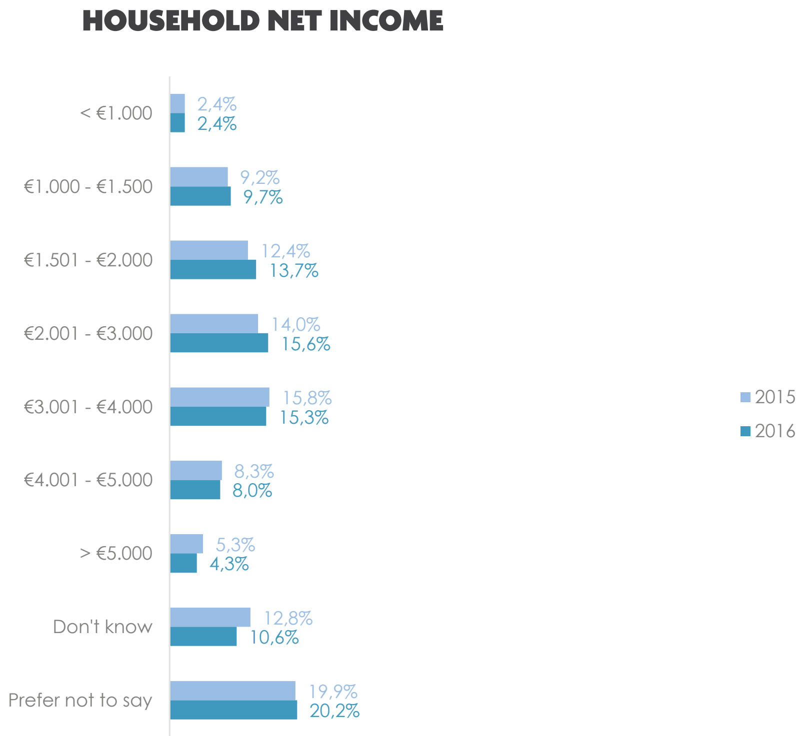


Socio-demographic graph 7: Population plotted by occupation (N=2.164)

HOUSEHOLD NET INCOME

Household net income is distributed normally, with the highest share of the sample (44,6%) having an income between €1.500 and €4.000. 2,4% has a family income of less than €1.000, 4,3% 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 (10,6%), or prefers not to report their household net income (20,2%).

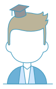


Socio-demographic graph 8: Population plotted by net household income (N=2.164)

SOCIO-DEMOGRAPHICS: DIGIMETER PROFILES

DISRUPTOR (24,1%)

The Disruptor is the youngest profile. The mean age of Disruptors is 35, compared to 48 in the total Flemish population. 41% of the Disruptors are younger than 30 years old, compared to 21% within the total population. Disruptors have the higest share of students among them (26%, compared to 12% within the total population). They tend to live with their parents (26%, compared to 14% within the total population).



CUMULATOR (38,6%)

In general, Cumulators tend to be slightly older than Disruptors (the mean age of Cumulators is 44, compared to 35 among Disruptors). 41% of Cumulators are between 30 and 49 years old, compared to 31% within the total population. Most commonly, they live together with their partners, with (36%) or without (28%) children. Typical for this segment is the large number of highly-educated people (43% have a bachelor or a master's degree, compared to 29% in the total population). Moreover, they tend to have higher incomes compared to other segments (40% earn at least €3.000 per month, whereas this figure is 28% within the total population).

STRUGGLER (10,9%)

Strugglers are most commonly aged 50 years and older (58%, compared to 48% within the total population). Just as with Cumulators, they tend to live together with their partners, with or without children (55%). Unlike Cumulators, Strugglers are less likely to have higher educations (26% hold a bachelor or a master's degree, compared to 43% of Cumulators), and are less likely to have higher incomes (21% earn at least €3.000 per month, compared to 40% among Cumulators).

There appears to be a remarkable subgroup within this profile that features the second-largest share of students - people aged 15-19 years old and living together with one or both parents - among its members (only preceded by Disruptors). These are young Flemings who seem to be not as digital-minded as most of their peers. They tend to live in families with a lower net income compared to their peers among the Disruptors, and have less (premium) devices and subscriptions at home.

RESISTOR (26,3%)

The Resistor is the oldest segment, with 54% being at least 65 years old (compared to 23% within the total population). Most commonly they live in small households, either as a single without children at home (41%) or living together with their partner without children at home (35%). They tend to be lower educated, as only 13% hold a Bachelor or Master degree (compared to 29% within the total population).

Gender

	Men	Women
Disruptor	55%	45%
Cumulator	52%	48%
Struggler	44%	56%
Resistor	41%	59%

Age

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Mean age
Disruptor	14%	28%	23%	16%	12%	3%	5%	35
Cumulator	5%	15%	19%	22%	22%	6%	11%	44
Struggler	9%	11%	10%	13%	14%	12%	33%	50
Resistor	2%	2%	4%	9%	17%	12%	54%	63

Household situation

	Single without children	Single with child(ren)	Married/ living together without children	Married/ living together with children	Living with one or both parents	Living with others
Disruptor	20%	8%	18%	22%	26%	5%
Cumulator	15%	6%	28%	36%	14%	2%
Struggler	20%	4%	33%	23%	18%	3%
Resistor	41%	6%	35%	14%	1%	3%

Household members

	1	2	3	4	5	6	More than 6
Disruptor	19%	27%	22%	19%	8%	3%	2%
Cumulator	14%	33%	19%	25%	7%	2%	0%
Struggler	18%	39%	17%	13%	11%	0%	2%
Resistor	43%	41%	6%	5%	3%	2%	1%

Occupation

	Student	White-collar worker	Blue-collar worker	Public servant/ teacher	C-level	Self-employed
Disruptor	26%	30%	13%	8%	1%	3%
Cumulator	10%	39%	8%	14%	2%	6%
Struggler	15%	19%	9%	7%	0%	1%
Resistor	2%	11%	4%	4%	0%	3%

Occupation (continuation of table above)

	Liberal profession	Houseman/-wife	Unemployed	Retired	Other
Disruptor	1%	2%	10%	7%	0%
Cumulator	2%	1%	4%	15%	0%
Struggler	1%	1%	8%	39%	0%
Resistor	1%	3%	10%	61%	1%

Education level

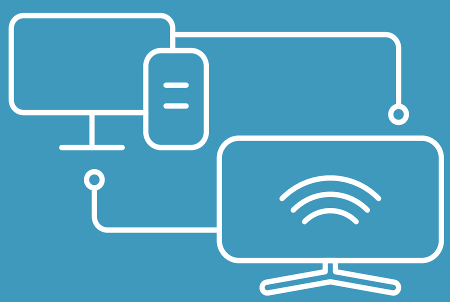
	No degree or primary education	Lower secundary	Higher secundary	Bachelor	Master
Disruptor	11%	16%	47%	14%	12%
Cumulator	6%	9%	42%	23%	20%
Struggler	10%	14%	50%	17%	9%
Resistor	24%	22%	41%	8%	5%

Net income

	€ 1.500 or less	€ 1.501 - € 3.000	More than € 3.000	Don't know	Prefer not to say
Disruptor	12%	29%	31%	15%	13%
Cumulator	5%	29%	40%	7%	19%
Struggler	10%	37%	21%	12%	20%
Resistor	23%	27%	9%	11%	29%

CHAPTER 01

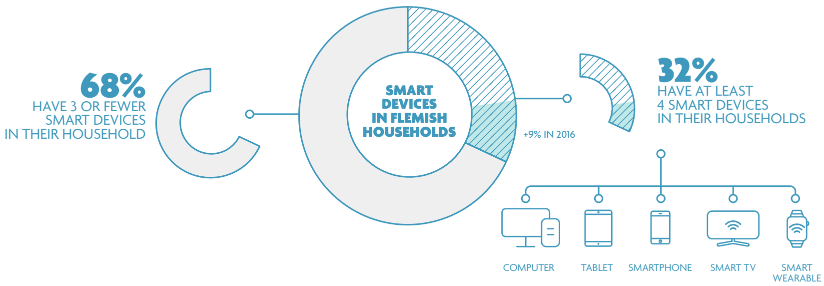
DEVICES & CONNECTIONS

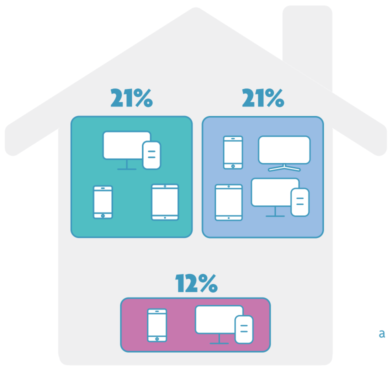


DIGIMETER INFOGRAPHIC

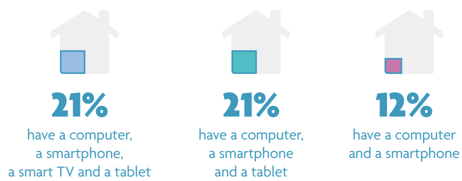
DEVICES & CONNECTIONS

Increase in smart devices

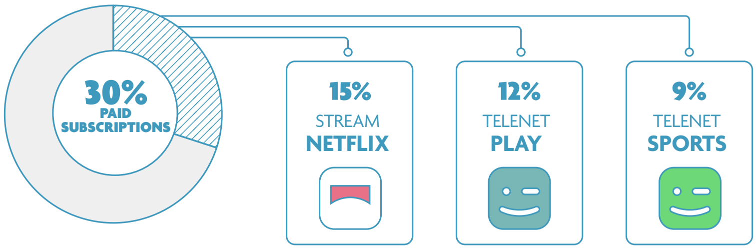




Top 3 constellations of smart devices in Flemish households

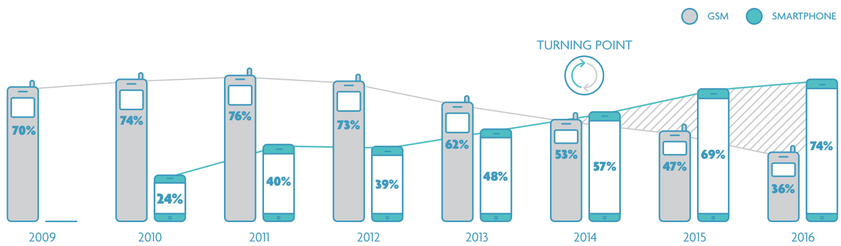


Paid subscriptions



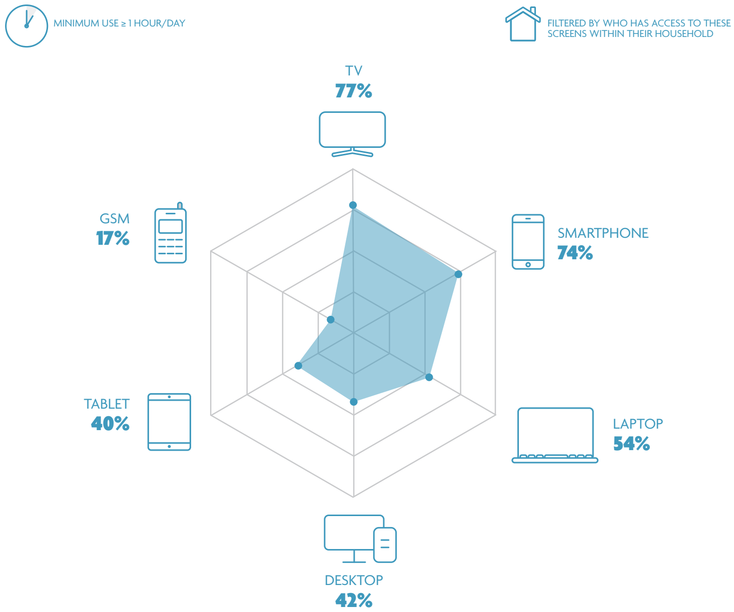
Smartphones vs. GSM

Divide in smartphone adoption vs. GSM adoption expands



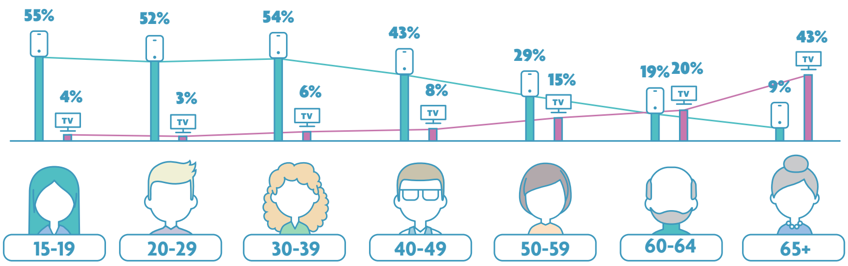
Intensively-used devices

The TV set and the smartphone are the most intensively-used devices



Most indispensable technology

The smartphone is #1 for 15-59 year olds , TV wins for 60+



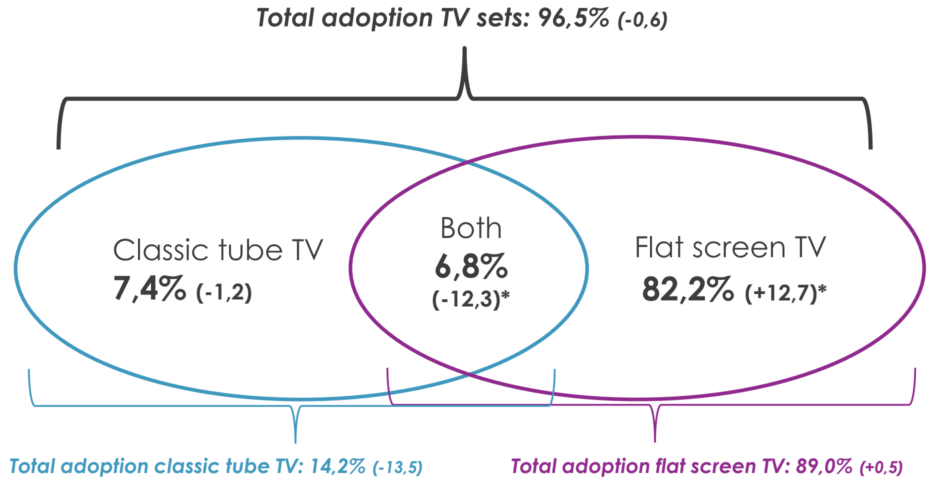
DEVICES & CONNECTIONS

TV EQUIPMENT

TV SETS

For most Flemings, the television screen remains a central device, with 96,5% of the Flemish population having a television set at home. Just like in previous years, the classic tube TV is becoming more and more of an exception. The most remarkable change is that the share of people having both a classic tube TV and a flat screen TV has dropped significantly, down 12,3 percentage points this year. So, while the adoption of flat screen TVs seems to stagnate at 89% of the population, we see that the flat screen TV is increasingly becoming the only type of television screen in use in Flemish households.

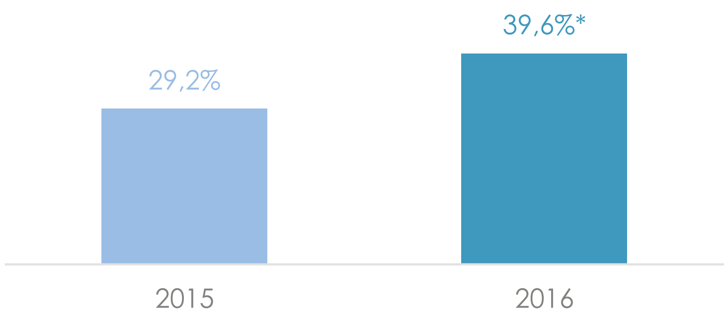
ADOPTION OF TELEVISION SETS: CLASSIC TUBE TV VS. FLAT SCREEN TV



Devices graph 1: Adoption television sets (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

4 out of 10 Flemings have a smart TV at home (39,6%), which is significantly more than last year (29,2%). As such, the adoption of smart TVs in Flanders is at the same level as in other European countries (see ‘A word on smart TV adoption’ below).

SMART TV

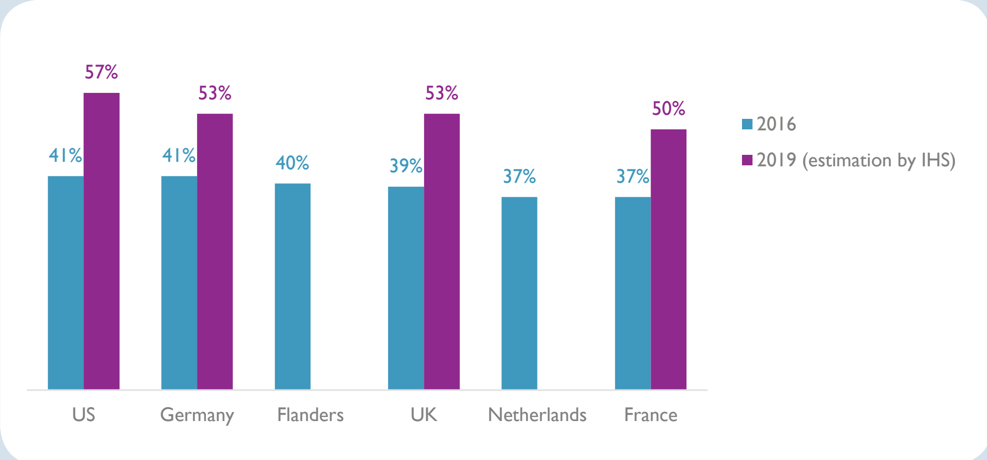


Devices graph 2: ‘Do you have access to a smart TV at home?’ (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

A WORD ON SMART TV ADOPTION

Almost 4 in 10 Flemings claim to have access to a smart TV at home (39,6%). As such, the adoption of smart TVs in Flanders is at the same level as in other European countries (37% in the Netherlands, 37% in France, 39% in the UK and 41% in Germany) and the US (41%). Moreover, according to an estimation by IHS, at least half of the households in the US (57%), Germany (53%), the UK (53%) and France (50%) will own a smart TV in 2019.

SMART TV ADOPTION



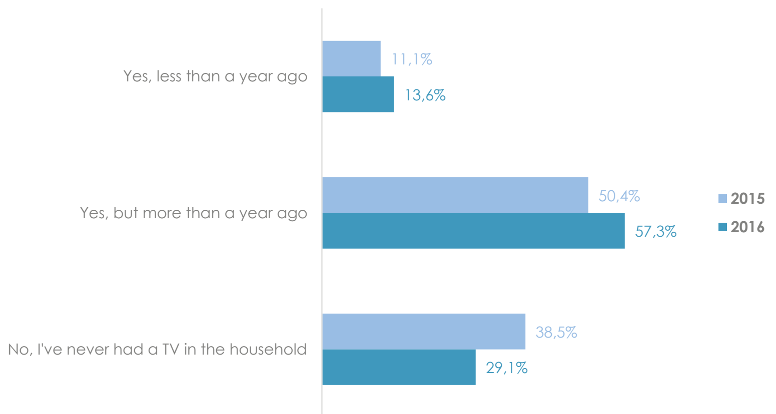
Framing graph 1: Smart TV adoption in Flanders compared to other countries
Source Flanders: digimeter 2016
Source Netherlands: Stichting Kijkonderzoek (https://kijkonderzoek.nl/images/Persberichten_algemeen/160719_Persbericht_TV_in_Nederland_1e_helft_2016.pdf)
Source other countries: IHS (http://press.ihs.com/press-release/more-half-all-households-japan-us-and-europe-will-have-smart-tvs-2019)

NO TV SET AT HOME

Like last year, less than 5% of the Flemish population does not have a TV set at home. Just over 7 out of 10 Flemings who don't have a TV set at home had one in the past. For 57,3%, over a year has passed since they last owned a TV set. Only 29,1% of Flemish people without a television set at home have never had one in the past.

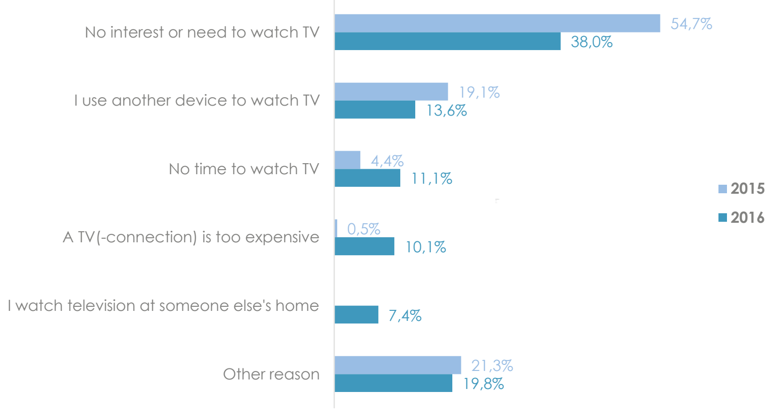
Lack of interest in or need to watch TV is still the main reason for not having a TV set at home (38,0%). Other reasons include using another device to watch TV, such as a laptop for instance (13,6%), lack of time to watch TV (11,1%) and the high cost of TV sets and corresponding TV connections/subscriptions (10,1%).

DID YOU PREVIOUSLY HAVE A TV SET AT HOME?



Devices graph 3: 'Did you previously have a TV set at home?' (of people with no TV set at home, N=76)

MAIN REASON FOR NOT HAVING A TV SET AT HOME



Devices graph 4: 'Main reason for not having a TV set at home' (of people with no TV set at home, N=76)

TV-RELATED DEVICES

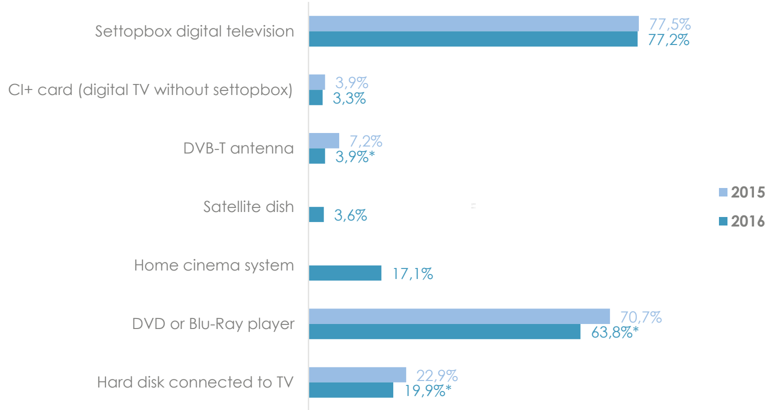
The presence of a set-top-box (STB) remains stable. More than three out of four Flemings have a STB such as a Digicorder by Telenet or a Proximus TV decoder (77,2%). Other solutions for connecting to a digital TV network are still rather niche, with 3,3% of the Flemish population having a CI+-card, 3,9% having a DVBT antenna and 3,6% having a satellite dish.

A substantial portion of the Flemish population is not satisfied with merely watching TV content (especially films and series); they want to experience it. This desire isn't just evident in the fact that 13,8% of Flemings have an ultra-HD TV screen, but also in the fact that 17,1% of Flemings claim to have a home cinema system. The presence of home cinema systems is strongly related to having a subscription to a video-on-demand (VOD) service (Netflix, Telenet Play/Play More or Proximus Movies & Series Pass), stressing the importance of the quality of the entertainment experience. 29,0% of Flemings with subscriptions to a VOD service have home cinema systems, compared to only 12,9% of Flemings who are not subscribed to VOD service.

The majority of the Flemish population still has a DVD or Blu-ray player at home. However, with 63,8% of Flemings having access to such a device, there is a significant drop compared to last year (-6,9 percentage points).

1 in 5 Flemings have a hard disk connected to their TVs (either built into a DVD or Blu-ray player or as a standalone hard disk such as a NAS-system). This figure is significantly lower compared to last year, when 22,9% of the Flemish population had a hard disk connected to their TV.

TV-RELATED DEVICES



Devices graph 5: 'Which of the following devices do you have access to within your household?' (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

HOME CINEMA SYSTEM OWNERSHIP

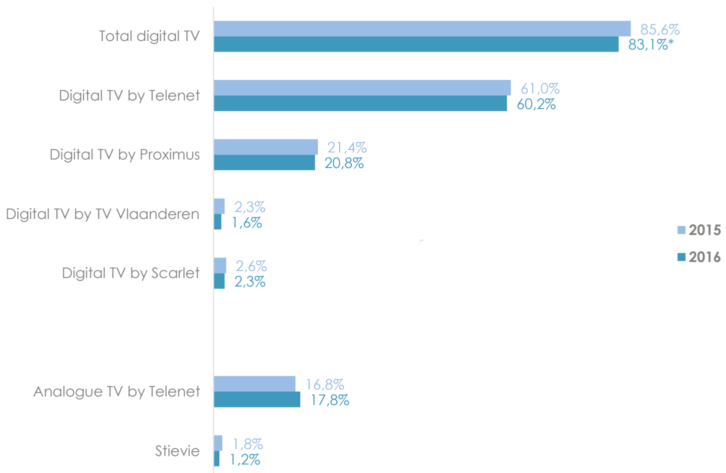
Devices graph 6: 'Owning a home cinema system' - split by having a VOD subscription or not (N=2.164)
* Statistically significant difference between both groups, based on a chi-square test.

TV CONNECTIONS & SUBSCRIPTIONS

TV CONNECTIONS

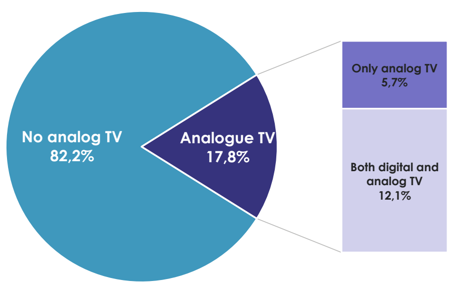
Just as in previous years since 2012, more than 8 in 10 Flemings have a digital TV connection at home (83,1%). The balance of power remains unchanged, with Telenet as the clear market leader (60,2% of Flemings have a digital TV subscription with Telenet) and Proximus as the challenger (20,8% of the Flemish population has a digital TV subscription with Proximus). Other providers like TV Vlaanderen (1,6%) or Scarlet (2,3%) are lagging behind. 1,2% claim to have a subscription to Stievie (not to be confused with the free online service Stievie Free). A remarkable 17,8% claim to still have an analog TV subscription. Note that the majority of those people combine an analog TV connection (for a TV set in the bedroom, for instance) with a digital TV connection for another TV set (for the main TV set in the living room, for instance).

TV CONNECTIONS



Devices graph 7: 'Which of the following TV connections do you have access to within your household?' (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

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

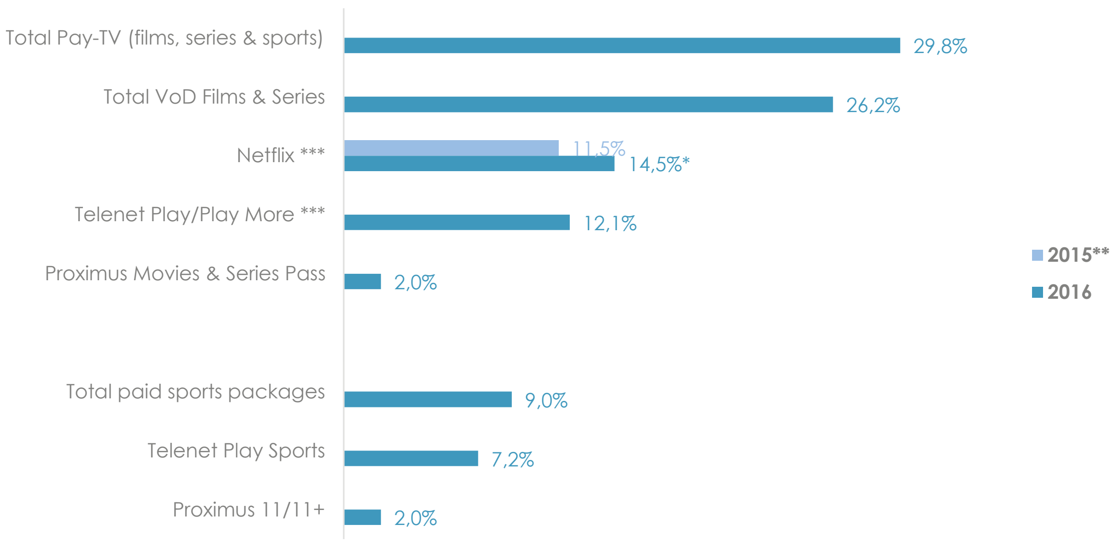


Devices graph 8: 'Having an analog TV connection' - split by also having a digital TV connection or not (N=2.164)

PAY TV PACKAGES

Some 3 in 10 Flemings claim to have access to a pay TV subscription. Most commonly this is a video-on-demand (VOD) service for films and series (26,2% of the Flemish population has access to such a subscription), with Netflix (14,5%) and Telenet Play or Play More (12,1%) as the most popular services. 9% of Flemings have a subscription to a paid sports package, with Telenet Play Sports (7,2%) as the model sports video service in Flanders.

PAY TV SUBSCRIPTIONS



Devices graph 9: 'Which of the following pay TV services are you subscribed to?' (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.
** Due to a change in formulation compared to the previous wave, we can only provide a year-on-year comparison for Netflix.
*** We would like to stress that digimeter only expresses the number of Flemings claiming having access to a certain VOD service. Although the percentage of Flemings claiming to have access to a Netflix account is higher (14,5%) than the percentage of Flemings claiming access to Telenet Play More (12,1%), this does not mean that Netflix has sold more subscriptions than Telenet in Flanders. Due to the nature of both services, we can assume that a Netflix account is more commonly shared with a larger group of friends or relatives outside of the family. In that way, it is even likely that there are more subscriptions sold in Flanders of Telenet Play and Play More packages compared to the number of Netflix subscriptions sold.

A WORD ON VOD SUBSCRIPTIONS

14,5% of the Flemish population claim to have access to Netflix. While this is a significant increase compared to 2015 (11,5%), it is still substantially lower compared to the situation in the Netherlands, where almost a quarter of the population has access to the video content streaming service (23%)[5].

This does not mean that 14,5% of the population pays for an individual Netflix account. With an extension to the question of whether Flemings had access to a Netflix account or not, we asked the respondents how many people share this account (including people inside and outside the household). Netflix users tend to share a Netflix account with an average of 4 to 5 other people. Based on a Flemish population (15+) of 5,4 million individuals, we estimate that Flanders is home to 157.000 to 196.000 Netflix accounts.

According to digimeter, 12,5% of Flemings aged 15 and older have access to the VoD-service Play or Play More (Telenet). As subscriptions to Play and Play More are more closely related to digital TV subscription, we can assume that these subscriptions are seldom shared outside of the household. As such, we arrive at an estimation of 280.000 to 335.000 subscriptions on Play or Play More in Flanders, which is in line with the 331.500 subscriptions communicated by Telenet[6].

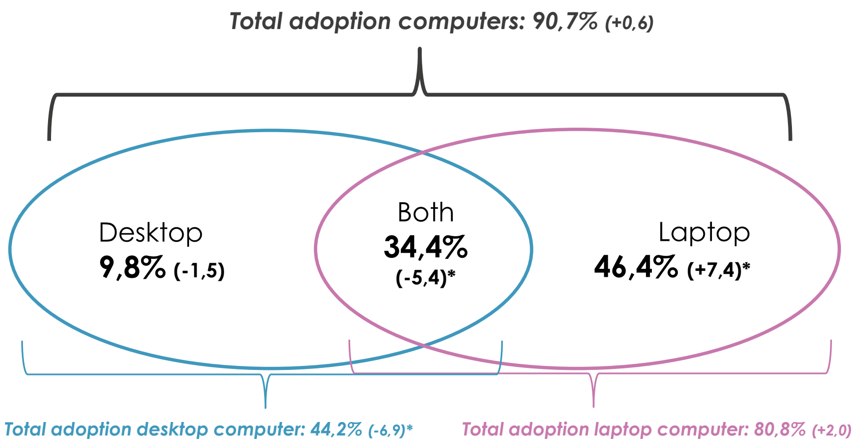
[5] Source: Telecompaper (https://www.telecompaper.com/nieuws/nederland-goed-voor-45-internationale-abonnees-netflix--1167508)
[6] Source: Telenet Half Year Report 2016 (http://phx.corporate-ir.net/External.File?item=UGFyZW50SUQ9MzQ4MDEzfENoaWxkSUQ9LTF8VHlwZ-T0z&t=1&cb=636058384102657285)

COMPUTERS & INTERNET

COMPUTERS

Computers remain omnipresent in Flemish households, with 9 in 10 Flemings having a computer at home. Most commonly, this is a laptop, which includes notebooks and hybrid laptop-tablet devices with detachable screens (80,8%). The presence of desktop computers is losing ground, as only 44,2% of the Flemish population claims to have one. The strongest decrease compared to last year is to be found in the portion of people having access to both a laptop and a desktop computer at home. In 2016, 34,4% owned both types of computers, down from 39,8% in 2015. It seems that people who owned both a desktop and a laptop until 2015 in particular are disposing of their desktop computers.

ADOPTION OF COMPUTERS: DESKTOP COMPUTERS VS. LAPTOP COMPUTERS

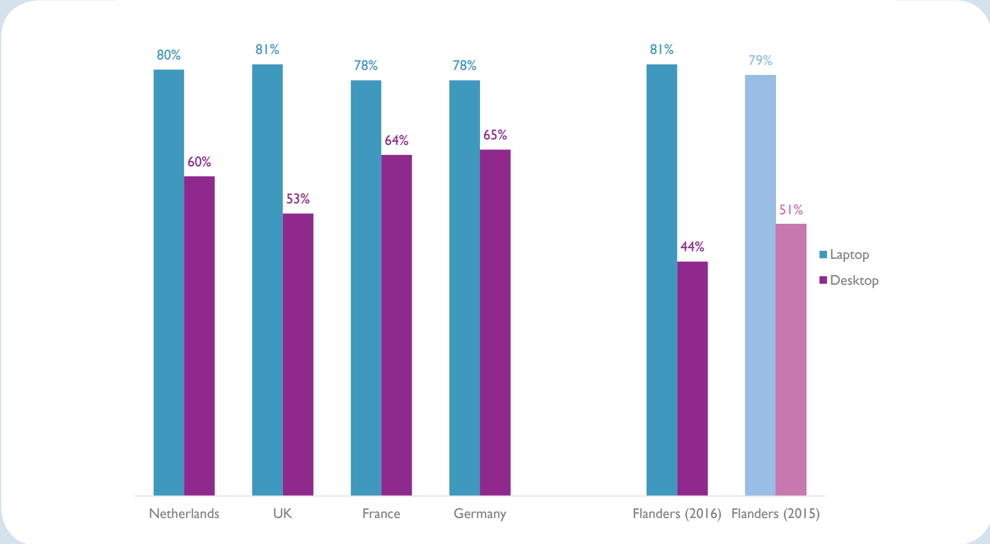


Devices graph 10: 'Adoption of computers' (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

A WORD ON LAPTOP AND DESKTOP ADOPTION

The adoption rate of laptop computers in Flanders (81%) is in line with that of neighboring countries the Netherlands (80%), the United Kingdom (81%), France (78%) and Germany (78%). When it comes to the adoption of desktop computers, however, we do see a remarkable difference. While only 44% of Flemings claim to have a desktop computer at home, this is still 60% in the Netherlands, 53% in the UK, 64% in France and 65% in Germany. However, we have to point out that the benchmarks of neighboring countries still relate to the situation at the end of 2015 (updates for 2016 were not available when digimeter was published). While the adoption of laptop computers remained quite stable during the past 5 years, the adoption of desktop computers has dropped significantly year after year (see chapter General Adoption). When we compare the benchmarks with the 2015 adoption rate for desktop computers in Flanders (51%), we see that this is in line with the situation in the UK (53%), but still lower compared to the Netherlands (60%), France (64%) and Germany (65%).

LAPTOP VS. DESKTOP ADOPTION

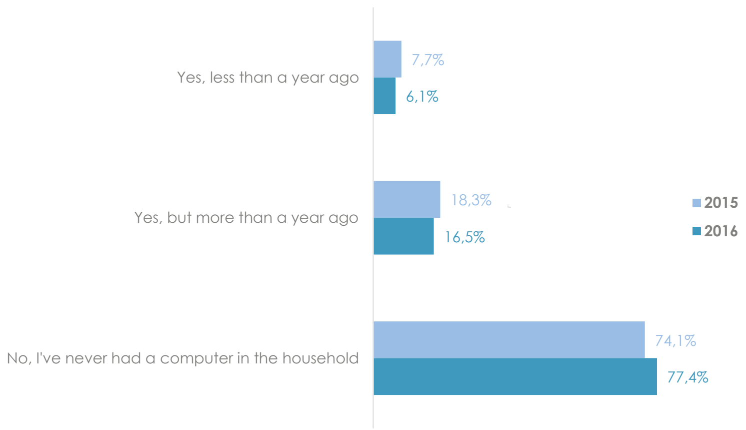


Framing graph 2: Adoption of desktop vs. laptop computers in Flanders compared to neighboring countries
Source Netherlands: GfK report 'Trends in Digital Media': http://www.gfk.com/nl/insights/press-release/geen-groei-meer-in-bezit-mobiele-devices/
Source other countries: Ofcom report 'The Communications Market Report 2015: International'
(https://www.ofcom.org.uk/research-and-data/cmr/cmr15/international)

NOT HAVING A COMPUTER AT HOME

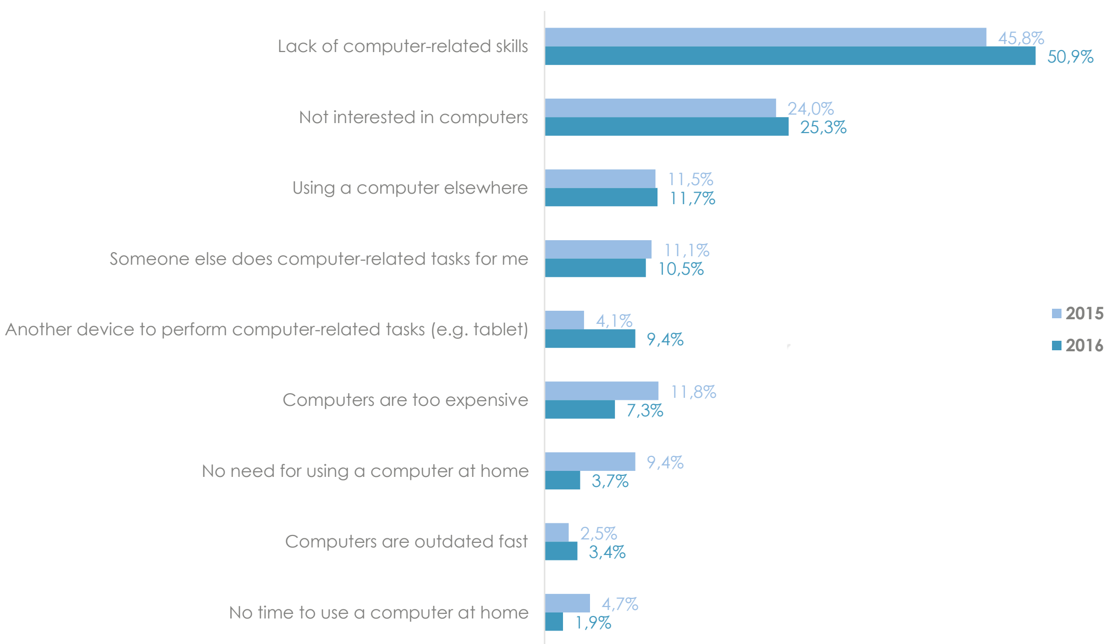
Just like last year, 1 in 10 Flemings don't have a computer (either desktop or laptop) at home (9,3%). More than 3 in 4 Flemings who don't have a computer at home never had one in the past. The main reason for not having a computer remains lack of skill (50,9%), followed by lack of interest in computers (25,3%). 1 in 10 Flemings without a computer at home state that they use a computer elsewhere (11,7%) or that they ask someone else to do computer-related tasks for them (10,5%). Remarkably, the use of other devices to perform computer-related tasks is, for an increasing number of people, an important reason not to own a computer (9,4%, up from 4,1% in 2015). This is especially true for people who owned a computer in the past.

DID YOU PREVIOUSLY HAVE A COMPUTER AT HOME?



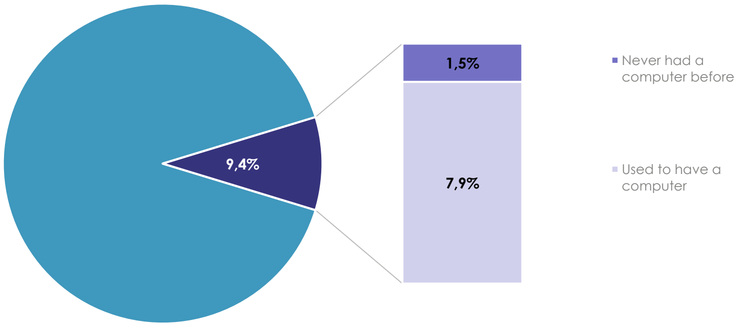
Devices graph 11: 'Did you previously have a computer at home?' (of people with no computer at home, N=201)

REASONS FOR NOT HAVING A COMPUTER AT HOME



Devices graph 12: 'Reasons for not having a computer at home' (of people with no computer at home, N=201)

MAIN REASON FOR NON-ADOPTION OF COMPUTERS: ANOTHER DEVICE TO PERFORM COMPUTER-RELATED TASKS (E.G. TABLET, SMARTPHONE) - SPLIT BY 'USED TO HAVE A COMPUTER IN THE PAST OR NOT'

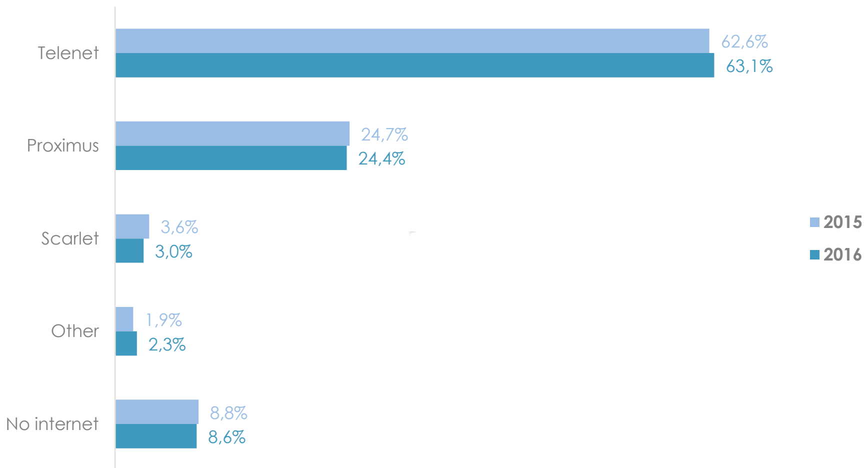


Devices graph 13: 'Main reason for non-adoption of computers - 'another device to perform computer-related tasks' (e.g. tablet, smartphone) - split by 'used to have a computer in the past or not' (of people with no computer at home, N=201)

INTERNET

The market shares of internet providers in Flanders seem to be set in stone. Telenet remains the clear market leader, serving 63,1% of the Flemish population, while a quarter of Flemings have an internet connection with Proximus. 1 in 12 Flemings claim to have no internet at home.

INTERNET PROVIDER

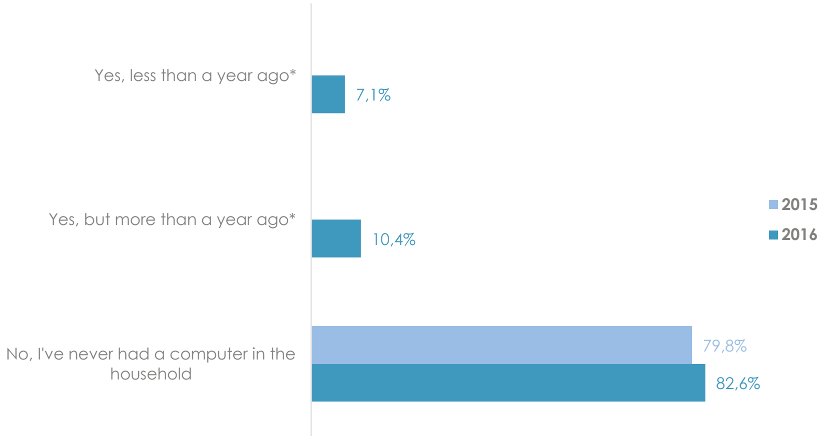


Devices graph 14: 'Provider of internet connection in your household' (N=2.164)

NOT HAVING INTERNET AT HOME

Just as last year, 1 in 12 Flemings claim to have no internet connection at home (8,6%). More than 8 in 10 Flemings who currently have no internet connection have never had one in the past. As with non-adoption of computers, the main reason for not having an internet connection at home is a perceived lack of skill. The most remarkable shift is the fact that a higher percentage of non-adopters claim that they use internet elsewhere (18,7%) and in that way don't see the need to use internet at home (21,7%).

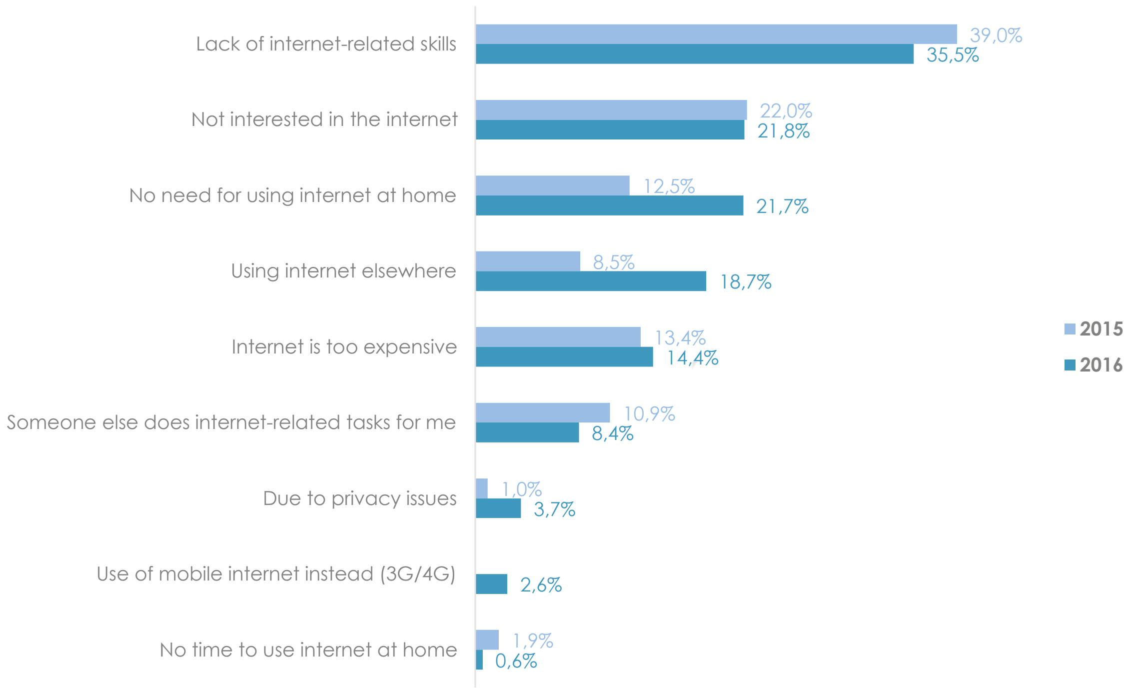
DID YOU PREVIOUSLY HAVE AN INTERNET CONNECTION AT HOME?



Devices graph 15: 'Did you previously have an internet connection at home?' (of people with no internet connection at home, N=185)

* Until last year, respondents only answered "Yes" or "No" to the question if they used to have an internet connection before. Since this wave, respondents had to specify their "Yes" response by stating if it this was less than a year ago or not. In that way, this question is more in line with other similar questions in the survey.

REASONS FOR NOT HAVING AN INTERNET CONNECTION AT HOME



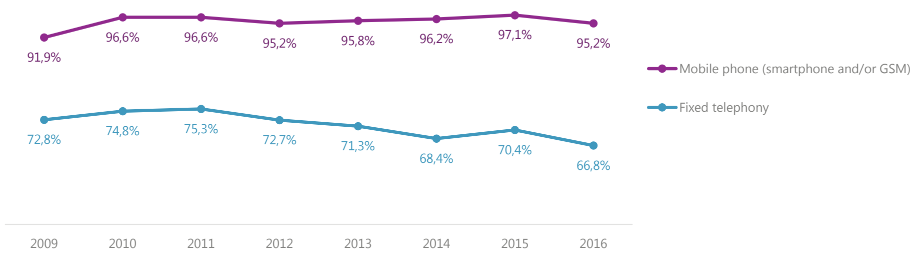
Devices graph 16: 'Reasons for not having an internet connection at home' (of people with no internet connection at home, N=185)

TELEPHONY

FIXED TELEPHONY

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

EVOLUTION OF FIXED TELEPHONY (LANDLINE) VS. MOBILE TELEPHONY



Devices graph 17: Evolution of having a fixed telephone line vs. having a mobile phone (smartphone and/or GSM) at home (N=2.164)

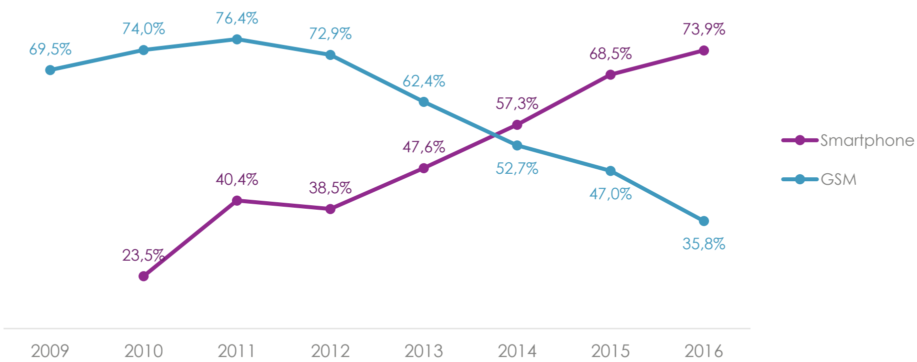
SMARTPHONE VS. GSM

Ever since the adoption of smartphones surpassed the adoption of 'regular' mobile phones (GSMs) in 2014, the divide between both curves has grown progressively. In 2016, almost 3 out of 4 Flemings claim to have a smartphone in their pocket (73,9%), a significant increase of 5,4 percentage points compared to the previous year. While the smartphone is increasingly finding acceptance in all segments, the highest adoption rates are still to be found within the young and highly-educated profiles. Nevertheless, with over 1 in 3 of Flemish people aged 65 and older having a smartphone, even the oldest segment accepts this device.

Just over 1 in 3 Flemings report to have a GSM at their disposal (35,8%), a significant decrease compared to 2015, when 47,0% of the Flemish population had a GSM. For over 1 in 5 Flemings, the GSM is the only mobile phone they have (21,2%). The profile of the people who only have a GSM and no smartphone is the mirror image of the profile of smartphone owners: less-educated people of 60 years and older.

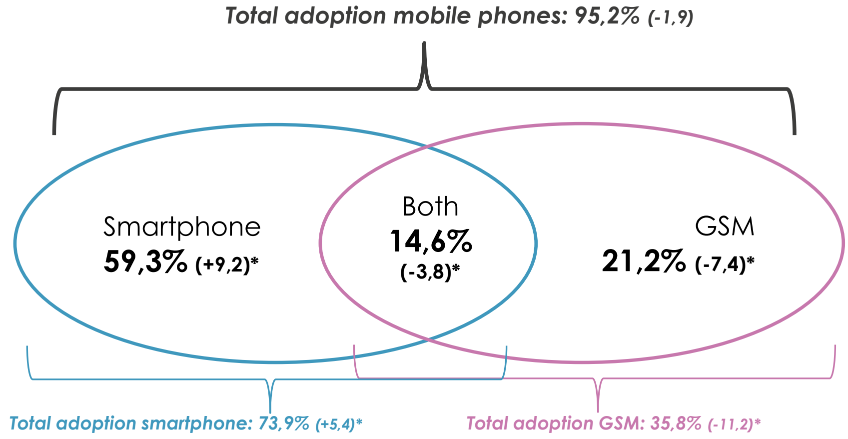
Some 1 in 7 Flemings have both a smartphone and a GSM (14,6%), which is significantly less compared to the previous year (-3,8 percentage points). Students in particular seem to have both types of mobile phones at their disposal.

EVOLUTION IN ADOPTION OF SMARTPHONE VS. GSM



Devices graph 18: Evolution in adoption of smartphone vs. GSM (N=2.164)

ADOPTION OF MOBILE PHONES: SMARTPHONES VS. GSMS

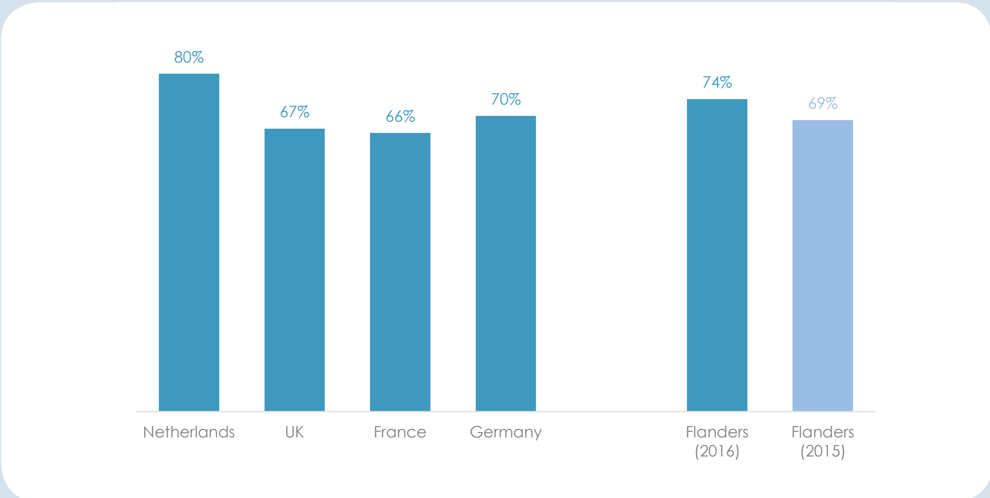


Devices graph 19: Adoption of mobile phones (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

A WORD ON SMARTPHONE ADOPTION

Almost 3 in 4 Flemings have a smartphone. This figure is still lower compared to that of the Netherlands (80%), but higher than those of the UK (67%), France (66%) and Germany (70%). However, keep in mind that the figures for the neighboring countries depict the situation at the end of 2015 (more recent results are not available yet). As the adoption rate of smartphones is still on the rise in most countries, the figures of neighboring countries could be underestimated compared to the adoption rate in Flanders for 2016. When we take the adoption rate of smartphones for 2015 in Flanders (69%), this is more in line with the adoption rate in Germany, the UK and France.

SMARTPHONE ADOPTION



Framing graph 3: Smartphone adoption in Flanders compared to neighboring countries
Source Netherlands: GfK report 'Trends in Digital Media': http://www.gfk.com/nl/insights/press-release/geen-groei-meer-in-bezit-mobiele-devices/
Source other countries: Ofcom report 'The Communications Market Report 2015: International'
(https://www.ofcom.org.uk/research-and-data/cmr/cmr15/international)

PROFILING SMARTPHONE ADOPTERS (N=1.599)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	77,9%	51,6%	105
Women	70,1%	48,4%	95
Age			
15-19	92,7%	8,2%	124
20-29	93,3%	18,0%	127
30-39	93,7%	19,0%	127
40-49	84,6%	18,7%	115
50-59	82,8%	19,4%	112
60-64	58,1%	5,7%	78
65+	34,7%	10,9%	47
Household members			
1	53,9%	17,0%	73
2	68,9%	31,9%	93
3	88,3%	19,4%	120
4	90,6%	20,8%	123
5	90,3%	7,9%	122
6	86,3%	2,2%	122
More than 6	65,0%	0,9%	90
Household situation			
Single without children	55,2%	17,6%	75
Single with child(ren)	77,5%	6,6%	105
Married/living together without children	65,9%	24,8%	89
Married/living together with children	87,4%	30,0%	118
Living with one or both parents	95,3%	18,0%	129
Living with others	73,2%	2,9%	97
Degree			
No degree or primary education	56,0%	9,3%	76
Lower secondary	56,9%	11,2%	77
Higher secondary	75,6%	44,7%	102
Bachelor	85,5%	18,9%	115
Master	89,8%	15,8%	122
Occupation			
Student	93,8%	15,4%	126
White-collar worker	89,4%	32,8%	121
Blue-collar worker	86,2%	9,6%	117
Public servant/teacher	89,8%	11,2%	122
C-level	100,0%	1,2%	133
Self-employed	89,5%	4,8%	120
Liberal profession	87,7%	1,2%	120
House husband/-wife	72,4%	1,6%	94
Unemployed	68,8%	7,0%	93
Retired	39,3%	14,8%	53
Other	59,3%	0,3%	75
Net income			
€ 1.000 or less	46,1%	1,5%	63
€ 1.001 - € 1.500	58,7%	7,7%	79
€ 1.501 - € 2.000	71,4%	13,3%	97
€ 2.001 - € 3.000	74,2%	15,7%	101
€ 3.001 - € 4.000	92,4%	19,2%	125
€ 4.001 - € 5.000	89,9%	9,8%	123
More than € 5.000	91,5%	5,3%	123
Don't know	72,1%	10,4%	98
Prefer not to say	62,7%	17,2%	85

Devices table 1: Profiling smartphone adopters (N=1.599)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 8,2% of all smarphone owners are between 15 and 19 years old. That age group only makes up 6,6% of the population of Flanders aged 15 or more. The result is an index of 124, which indicates that the youngest age segment is overrepresented among smartphone owners.

PROFILING GSM ONLY ADOPTERS (N=460)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	18,2%	42,0%	86
Women	24,2%	58,0%	114
Age			
15-19	3,1%	1,0%	15
20-29	4,9%	3,3%	23
30-39	5,1%	3,6%	24
40-49	13,7%	10,5%	64
50-59	15,2%	12,4%	72
60-64	39,5%	13,6%	186
65+	50,9%	55,6%	240
Household members			
1	35,2%	38,6%	166
2	26,1%	42,0%	123
3	11,6%	8,9%	55
4	7,5%	6,0%	36
5	7,9%	2,4%	37
6	13,7%	1,2%	67
More than 6	19,7%	0,9%	90
Household situation			
Single without children	34,5%	38,1%	162
Single with child(ren)	17,0%	5,1%	81
Married/living together without children	29,8%	39,1%	140
Married/living together with children	11,1%	13,3%	52
Living with one or both parents	4,2%	2,8%	20
Living with others	11,2%	1,6%	53
Degree			
No degree or primary education	33,6%	19,5%	159
Lower secondary	30,0%	20,6%	141
Higher secondary	21,4%	44,1%	101
Bachelor	13,1%	10,1%	62
Master	9,3%	5,7%	44
Occupation			
Student	4,2%	2,4%	20
White-collar worker	9,7%	12,4%	46
Blue-collar worker	11,2%	4,4%	54
Public servant/teacher	8,3%	3,6%	39
C-level	0,0%	0,0%	0
Self-employed	7,7%	1,4%	35
Liberal profession	12,3%	0,6%	60
House husband/-wife	27,6%	2,2%	129
Unemployed	27,0%	9,5%	127
Retired	47,9%	62,7%	226
Other	40,7%	0,8%	200
Net income			
€ 1.000 or less	38,2%	4,3%	179
€ 1.001 - € 1.500	37,1%	17,0%	175
€ 1.501 - € 2.000	25,6%	16,5%	120
€ 2.001 - € 3.000	21,7%	16,0%	103
€ 3.001 - € 4.000	6,2%	4,4%	29
€ 4.001 - € 5.000	9,8%	3,7%	46
More than € 5.000	8,5%	1,7%	40
Don't know	17,3%	8,7%	82
Prefer not to say	29,1%	27,6%	137

Devices table 2: Profiling GSM only adopters (no smartphone) (N=460)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 55,6% of all Flemings owning a GSM but no smartphone are aged 65 years and older. That age group only makes up 23,2% of the total population of Flanders aged 15 or more. The result is an index of 240, which clearly indicates that the oldest age segment is highly overrepresented among 'GSM only' owners.

PROFILING PEOPLE HAVING BOTH SMARTPHONE AND GSM (N=316)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	15,1%	50,6%	103
Women	14,1%	49,4%	97
Age			
15-19	40,8%	18,4%	279
20-29	22,9%	22,4%	158
30-39	9,8%	10,1%	67
40-49	9,4%	10,5%	64
50-59	14,8%	17,6%	102
60-64	15,8%	7,9%	108
65+	8,3%	13,2%	57
Household members			
1	4,4%	7,0%	30
2	14,3%	33,4%	98
3	16,8%	18,7%	115
4	19,7%	22,9%	136
5	26,8%	11,9%	183
6	32,7%	4,1%	228
More than 6	28,9%	2,0%	200
Household situation			
Single without children	5,1%	8,3%	35
Single with child(ren)	10,1%	4,4%	70
Married/living together without children	12,6%	24,0%	86
Married/living together with children	13,9%	24,1%	95
Living with one or both parents	37,9%	36,2%	259
Living with others	14,8%	3,0%	100
Degree			
No degree or primary education	13,8%	11,7%	95
Lower secondary	11,5%	11,5%	79
Higher secondary	17,0%	50,9%	116
Bachelor	13,8%	15,5%	95
Master	11,7%	10,4%	80
Occupation			
Student	36,7%	30,5%	250
White-collar worker	12,0%	22,3%	82
Blue-collar worker	15,5%	8,8%	107
Public servant/teacher	10,9%	6,9%	75
C-level	9,0%	0,5%	56
Self-employed	6,6%	1,8%	45
Liberal profession	10,7%	0,8%	80
House husband/-wife	16,6%	1,9%	112
Unemployed	20,9%	10,7%	143
Retired	8,3%	15,9%	57
Other	0,0%	0,0%	0
Net income			
€ 1.000 or less	6,0%	1,0%	42
€ 1.001 - € 1.500	10,0%	6,6%	68
€ 1.501 - € 2.000	11,2%	10,5%	77
€ 2.001 - € 3.000	14,2%	15,3%	98
€ 3.001 - € 4.000	13,8%	14,4%	94
€ 4.001 - € 5.000	19,1%	10,5%	131
More than € 5.000	21,3%	6,3%	147
Don't know	24,4%	17,8%	168
Prefer not to say	12,7%	17,6%	87

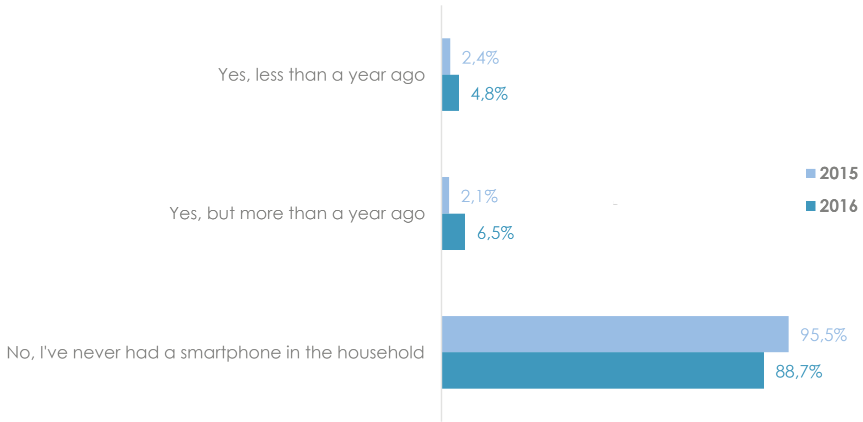
Devices table 3: Profiling people having both smartphone and GSM (N=316)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 18,4% of all Flemings owning both a smartphone and a GSM are between 15 and 19 years old. That age group only makes up 6,6% of the total population of Flanders aged 15 or more. The result is an index of 279, which clearly indicates that the youngest age segment is highly overrepresented among Flemings owning both types of mobile phones.

NO SMARTPHONE

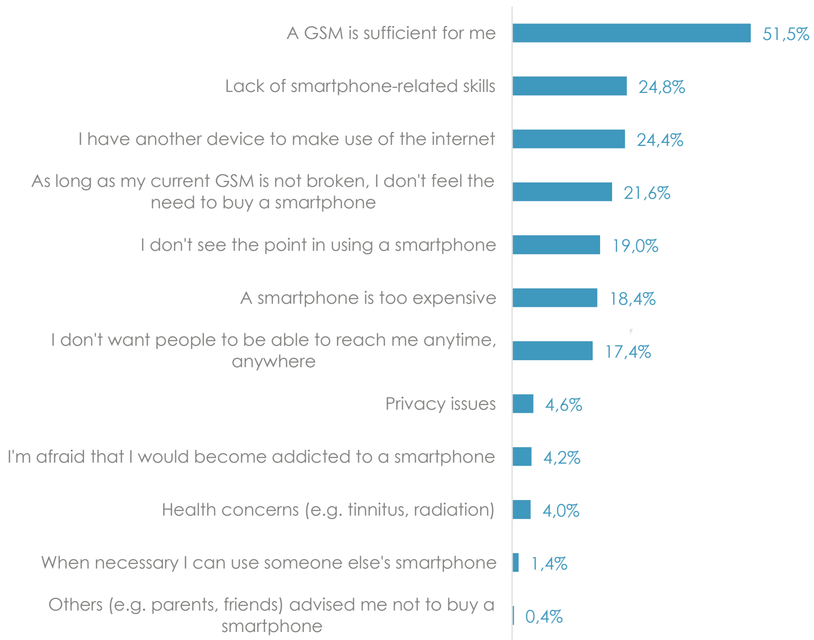
A quarter of the Flemings don't have a smartphone (26,1%), which is a significant decrease compared to last year (31,5%). Most people who currently don't have a smartphone never had one before (88,7%). 11,3% of Flemings without a smartphone did have a smartphone before (4,8% within a year ago, 6,5% more than a year ago). The main reason for not having a smartphone is because they don't see added value compared to GSM use. People who used to have a smartphone report bad experiences as important drivers to discarding the smartphone: 26,6% found a smartphone too expensive (both in purchase and in subscription), 20,3% rarely used their smartphone, and 18,8% didn't see an advantage in using a smartphone. A small number even developed an aversion towards smartphones (1,6%).

HAVE YOU EVER HAD A SMARTPHONE BEFORE?



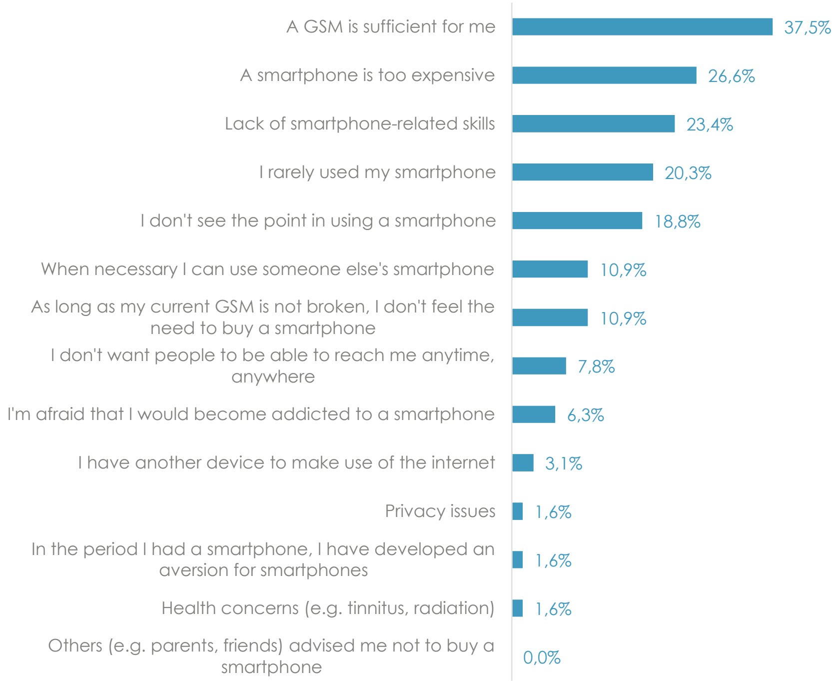
Devices graph 20: 'Have you ever had a smartphone before?' (of people with no smartphone, N=565)

REASONS FOR NOT HAVING A SMARTPHONE: NEVER HAD A SMARTPHONE



Devices graph 21: 'Reasons for not having a smartphone' (of people who never had a smartphone, N=501)

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



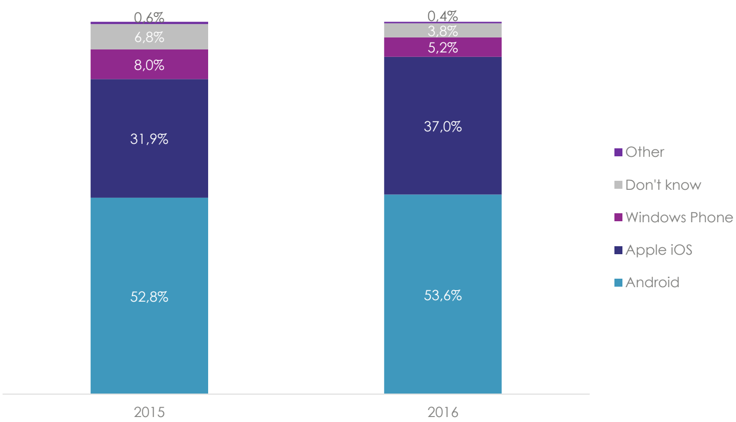
Devices graph 22: 'Reasons for not having a smartphone' (of people who used to have a smartphone, but not anymore, N=64)

SMARTPHONE: OPERATING SYSTEMS AND CONNECTIONS

Android remains the most popular operating system for smartphones in Flanders. iOS (iPhone) comes in second place at 37,0%, with a remarkable increase of 5,1 percentage points compared to last year. That increase is largely due to a fall in the market share of Windows phones (from 8,0% in 2015 down to 5,2% in 2016). It is also related to the success of iPhone SE, the smaller (and cheaper) iPhone version launched in spring of 2016. CEO Tim Cook revealed[7] that not only did demand exceed the supply of this device, but also that it seems to attract a new type of customers to the brand: individuals who aspired to have an iPhone, but for whom the entry price of 'regular' iPhones was too high. For this group, the selling price of €489 is more within budget reach (compared to €659 for the cheapest iPhone 6s-version). In other words, while the 'regular' iPhone versions are mainly sold to people wanting to update their old iPhones, the iPhone SE seems to attract a substantial amount of customers who have never bought an Apple product before.

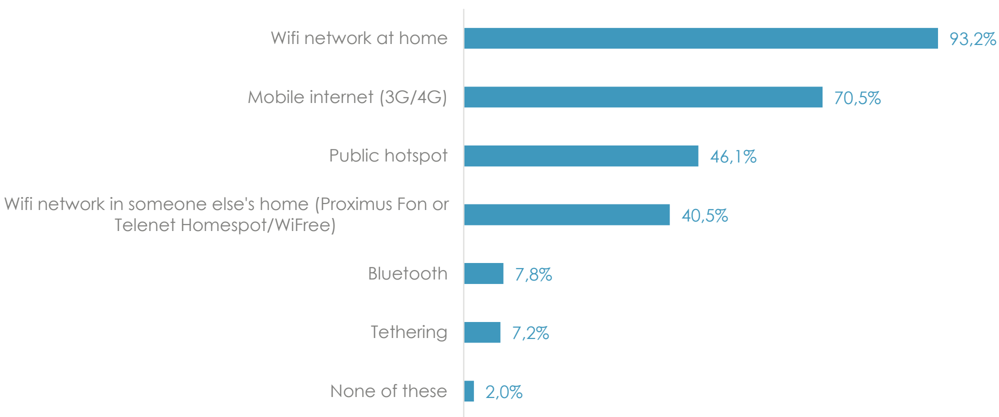
Wifi is by far the most common way to connect a smartphone to the internet. 7 in 10 smartphone owners in Flanders have a subscription to a mobile internet connection (3G or 4G connection). 2% of smartphone owners never connect their smart-phone to the internet or to another device.

OPERATING SYSTEM OF THE MOST FREQUENTLY-USED SMARTPHONE



Devices graph 23: 'Operating system of the most frequently-used smartphone' (of people owning a smartphone, N=1.599)

CONNECTIONS ON SMARTPHONE



Devices graph 24: 'Which of the following connections do you use on your smartphone to connect to the internet or with other devices?' (of people who own a smartphone, N=1.599)

[7] See http://mashable.com/2016/04/27/apple-iphone-se-silver-lining/#JJCIP5U0kuqw and http://www.itpro.co.uk/mobile/26198/iphone-se-release-date-price-specs-and-features-iphone-se-is-attracting-new-ios-users

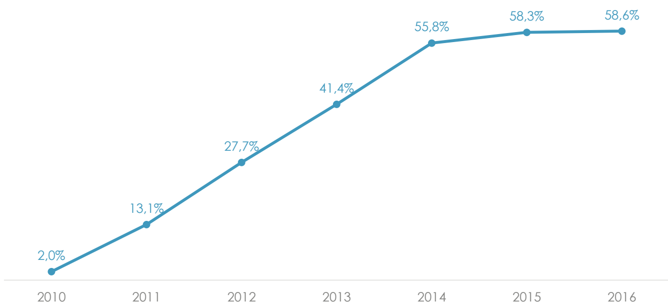
TABLET

TABLET ADOPTION

In 2015, we noticed for the first time that the spectacular increase in tablet adoption had come to a stop. This conclusion has been confirmed by the 2016 data. As in the previous year, just under 6 in 10 Flemings claim to have a tablet at home.

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

EVOLUTION IN ADOPTION OF TABLETS



Devices graph 25: Evolution in adoption of tablets (N=2.164)

PROFILING TABLET ADOPTERS (N=1.268)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	61,2%	51,1%	104
Women	56,1%	48,9%	96
Age			
15-19	59,2%	6,6%	100
20-29	65,1%	15,8%	111
30-39	66,7%	17,1%	114
40-49	66,9%	18,6%	114
50-59	67,7%	20,0%	116
60-64	52,7%	6,6%	90
65+	38,5%	15,2%	66
Household members			
1	37,0%	14,7%	63
2	59,7%	34,8%	102
3	67,3%	18,6%	115
4	76,4%	22,1%	131
5	66,4%	7,4%	114
6	55,0%	1,7%	94
More than 6	34,7%	0,6%	60
Household situation			
Single without children	36,9%	14,8%	63
Single with child(ren)	54,4%	5,9%	94
Married/living together without children	60,8%	28,9%	104
Married/living together with children	73,7%	31,9%	126
Living with one or both parents	69,6%	16,6%	119
Living with others	37,4%	1,9%	63

Devices table 4: Profiling tablet adopters (N=1.268)

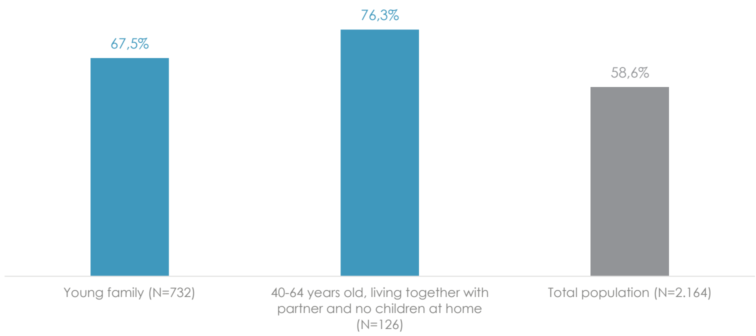
* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 15,2% of all Flemings having access to a tablet at home are at least 65 years old. That age group makes up 23,2% of the total population of Flanders aged 15 or more. The result is an index of 66, which clearly indicates that the oldest age segment is underrepresented among Flemings having a tablet at home.

	Level of adoption	Profile	Index profile compared with population*
Degree			
No degree or primary education	35,0%	7,4%	60
Lower secondary	48,4%	12,1%	83
Higher secondary	61,1%	45,6%	104
Bachelor	71,6%	20,0%	122
Master	67,6%	15,0%	115
Occupation			
Student	63,6%	13,2%	108
White-collar worker	71,2%	33,0%	122
Blue-collar worker	63,1%	8,9%	109
Public servant/teacher	62,7%	9,9%	108
C-level	81,0%	1,2%	133
Self-employed	69,8%	4,7%	118
Liberal profession	69,4%	1,2%	120
House husband/-wife	54,4%	1,5%	88
Unemployed	45,8%	5,8%	77
Retired	42,5%	20,2%	73
Other	52,8%	0,4%	100
Net income			
€ 1.000 or less	21,6%	0,9%	38
€ 1.001 - € 1.500	33,4%	5,5%	57
€ 1.501 - € 2.000	56,4%	13,2%	96
€ 2.001 - € 3.000	62,4%	16,6%	106
€ 3.001 - € 4.000	69,0%	18,0%	118
€ 4.001 - € 5.000	80,9%	11,1%	139
More than € 5.000	81,5%	6,0%	140
Don't know	52,6%	9,6%	91
Prefer not to say	55,2%	19,0%	94

Devices table 4: Profiling tablet adopters (N=1.268)

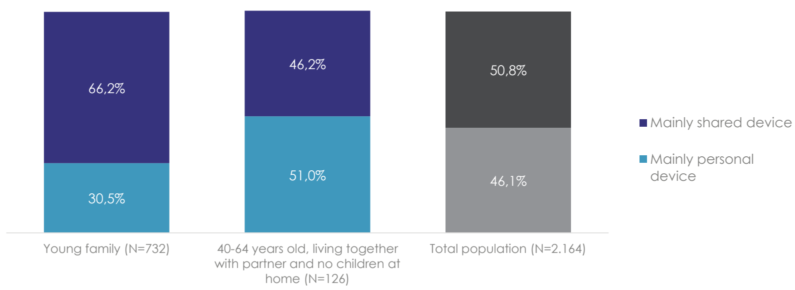
* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 15,2% of all Flemings having access to a tablet at home are at least 65 years old. That age group makes up 23,2% of the total population of Flanders aged 15 or more. The result is an index of 66, which clearly indicates that the oldest age segment is underrepresented among Flemings having a tablet at home.

TABLET ADOPTION RATE BY USER TYPE



Devices graph 26: Tablet adoption rate by user type

TABLET AS A PERSONAL VS. SHARED DEVICE BY USER TYPE

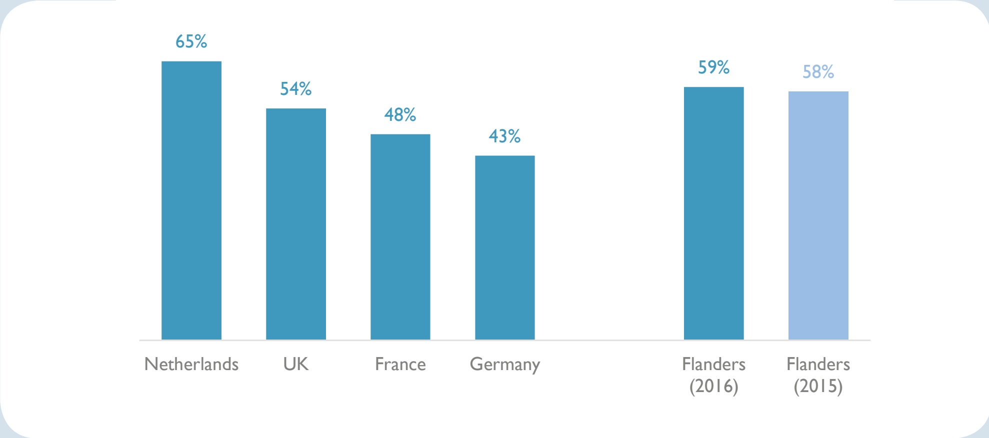


Devices graph 27: Tablet as a personal vs. shared device by user type

A WORD ON TABLET ADOPTION

Although the growth of tablet adoption has come to a stop in the last 2 years in Flanders, we do see that the tablet is still a popular device in the region compared to other neighboring countries. While the adoption rate of tablets in Flanders is still slightly lower than that in the Netherlands (65%), it is higher than in the UK (54%), France (48%) and Germany (43%).

TABLET ADOPTION



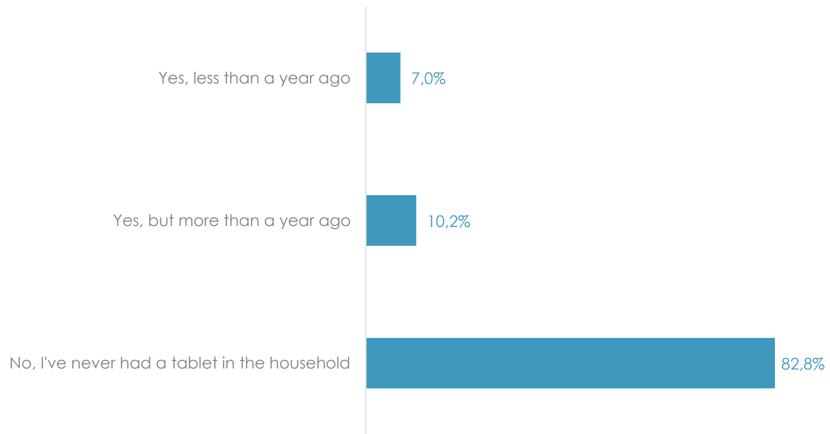
Framing graph 4: Tablet adoption in Flanders compared to neighboring countries
Source Netherlands: GfK report 'Trends in Digital Media': http://www.gfk.com/nl/insights/press-release/geen-groei-meer-in-bezit-mobiele-devices/
Source other countries: Ofcom report 'The Communications Market Report 2015: International' (https://www.ofcom.org.uk/research-and-data/cmr/cmr15/international)

NOT HAVING A TABLET

The number of Flemings who don't have access to a tablet has remained stable (41,4%, compared to 41,7% last year). Over 8 in 10 Flemings who don't have a tablet now never had one before (82,8%), mainly because they don't see added value in using a tablet. They use other devices to connect to the internet (46,2%), and don't see the point in using a tablet (33,2%).

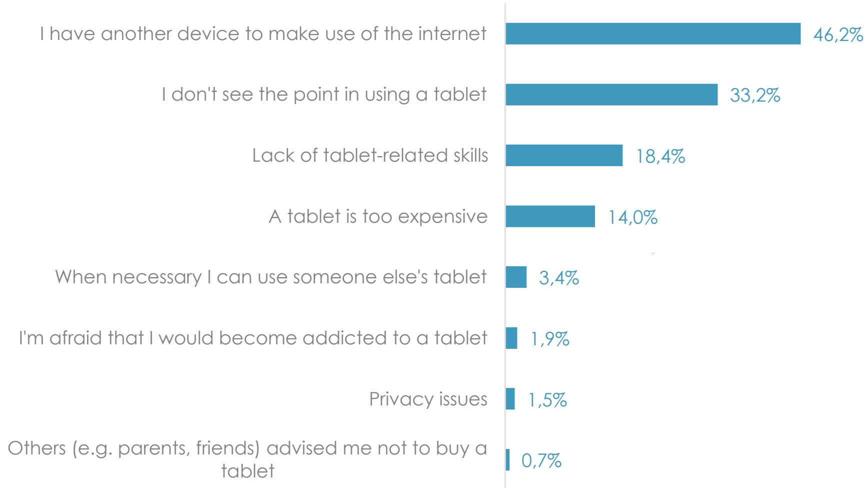
17,2% of the respondents who don't have a tablet at the moment used to have one before. They discarded the tablet mainly because they rarely used it (40,3%) and because they have other devices that connect to the internet (38,7%).

HAVE YOU EVER HAD A TABLET BEFORE?



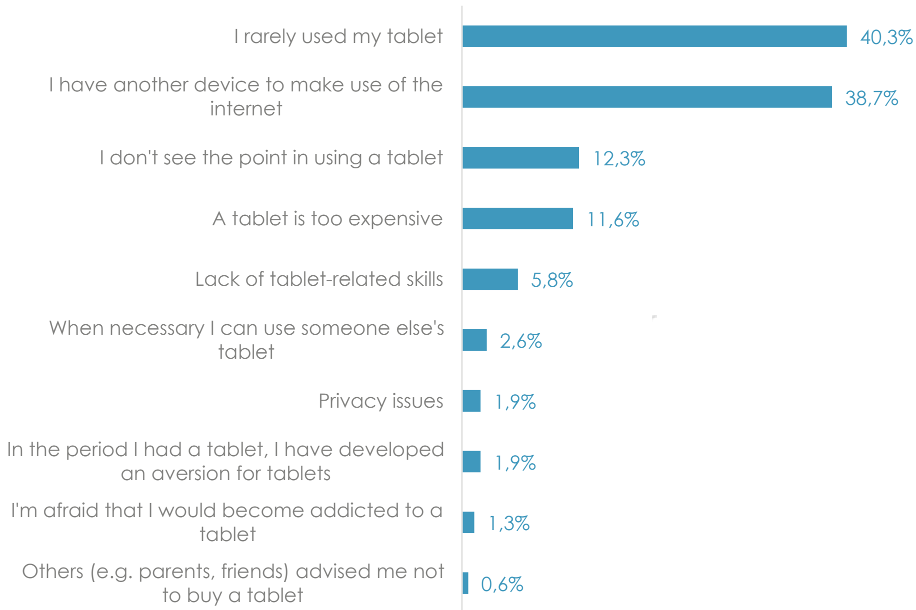
Devices graph 28: 'Have you ever had a tablet before?' (of people with no tablet, N=896)

REASONS FOR NOT HAVING A TABLET: NEVER HAD A TABLET



Devices graph 29: 'Reasons for not having a tablet' (of people who never had access to a tablet in their household before, N=742)

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



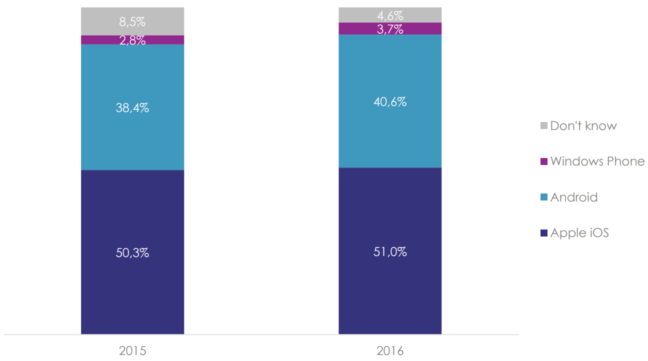
Devices graph 30: 'Reasons for not having a tablet' (of people who used to have access to a tablet in their household before, N=154)

TABLET: OPERATING SYSTEMS AND CONNECTIONS

Over half of tablets are iPads (51,0%). Android-based tablets come in second place, with 40,6% of the market share. The tablet is mainly a personal device for 46,1% of the Flemings with access to a tablet. For 50,8%, the tablet is a shared device (with 16,8% mainly used by others, and 34,0% more or less balanced between private use and use by others). A small fraction (3,2%) indicates that they do possess a tablet at home, but that it is hardly used by anyone.

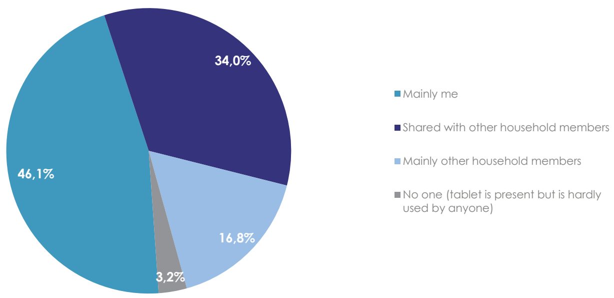
Just like with smartphones, the main connection type for tablets is home wifi. But only 12,9% of Flemish people owning a tablet also have a subscription to mobile internet (3G/4G) for their tablet (for smartphones, this figure was 70,5%). Overall, it seems clear that the tablet remains a less 'mobile' device than the smartphone.

OPERATING SYSTEM OF THE MOST FREQUENTLY-USED TABLET



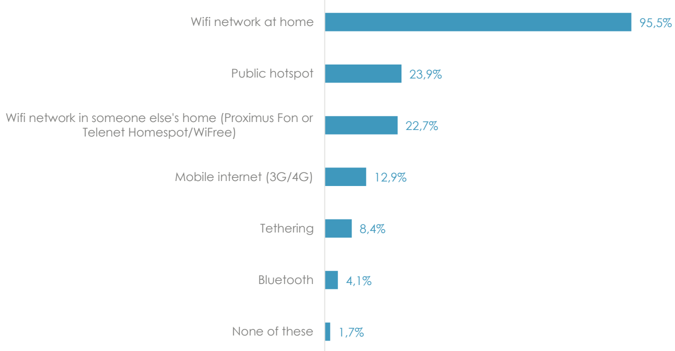
Devices graph 31: 'Operating system of the most frequently-used tablet' (of people owning a tablet, N=1.268)

WHO USES THE TABLET?



Devices graph 32: 'Who uses the tablet?' (of people owning a tablet, N=1.268)

CONNECTIONS ON TABLET



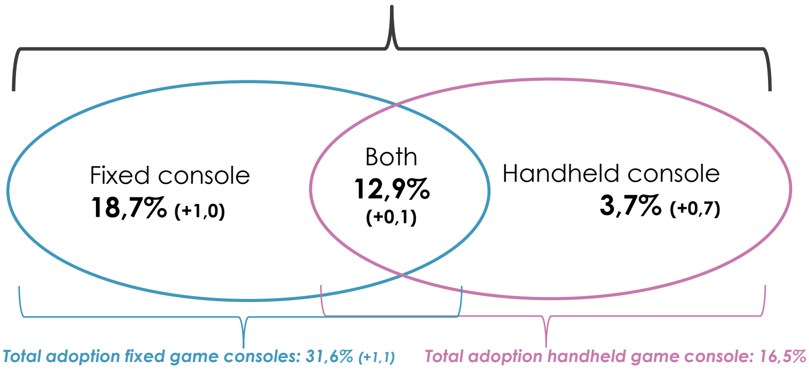
Devices graph 33: 'Which of the following connections do you use on your tablet to connect to the internet or with other devices?' (of people who own a tablet, N=1.268)

GAME CONSOLES

The presence of game consoles in Flemish households remains stable. Over 1 in 3 Flemings report having a game console at home (35,2%). The fixed console, connected to a TV screen, is the most popular type of console (31,6%). 1 in 6 Flemings have a portable (handheld) game console (16,5%). 12,9% of the Flemish population has both types of devices at home.

People having a game console at home tend to be younger than 39 years old, live in larger households and are most likely students or blue-collar workers.

ADOPTION OF GAME CONSOLES: FIXED VS. HANDHELD CONSOLES



Devices graph 34: Adoption of game consoles (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

PROFILING GAME CONSOLE ADOPTERS (N=763)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	37,2%	51,7%	106
Women	33,4%	48,3%	95
Age			
15-19	75,3%	14,0%	212
20-29	64,3%	26,0%	183
30-39	52,0%	22,1%	147
40-49	37,5%	17,4%	107
50-59	32,6%	16,0%	92
60-64	10,2%	2,1%	29
65+	3,6%	2,4%	10
Household members			
1	14,3%	9,5%	41
2	20,4%	19,8%	58
3	49,1%	22,6%	140
4	61,4%	29,5%	175
5	71,4%	13,2%	203
6	73,4%	3,8%	211
More than 6	56,6%	1,6%	160
Household situation			
Single without children	15,8%	10,5%	45
Single with child(ren)	51,7%	9,3%	148
Married/living together without children	17,9%	14,1%	51
Married/living together with children	49,7%	35,8%	141
Living with one or both parents	67,3%	26,6%	190
Living with others	42,9%	3,6%	120

Devices table 5: Profiling game console adopters (N=763)
* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 14,0% of all Flemings having access to a game console at home are between 15 and 19 years old. That age group only makes up 6,6% of the total population of Flanders aged 15 or more. The result is an index of 212, which clearly indicates that the youngest age segment is highly overrepresented among Flemings having a game console at home.

	Level of adoption	Profile	Index profile compared with population*
Degree			
No degree or primary education	32,6%	11,4%	93
Lower secondary	28,9%	12,0%	82
Higher secondary	34,7%	43,1%	99
Bachelor	41,9%	19,4%	118
Master	38,3%	14,1%	108
Occupation			
Student	70,0%	24,1%	198
White-collar worker	44,5%	34,3%	127
Blue-collar worker	55,5%	12,9%	157
Public servant/teacher	42,5%	11,1%	121
C-level	46,4%	1,1%	122
Self-employed	29,5%	3,3%	83
Liberal profession	31,0%	0,9%	90
House husband/-wife	32,9%	1,5%	88
Unemployed	32,0%	6,8%	91
Retired	4,4%	3,5%	13
Other	25,2%	0,3%	75
Net income			
€ 1.000 or less	13,8%	0,9%	38
€ 1.001 - € 1.500	17,5%	4,8%	49
€ 1.501 - € 2.000	33,3%	13,0%	95
€ 2.001 - € 3.000	33,3%	14,8%	95
€ 3.001 - € 4.000	45,6%	19,8%	129
€ 4.001 - € 5.000	46,4%	10,5%	131
More than € 5.000	42,8%	5,2%	121
Don't know	55,1%	16,6%	157
Prefer not to say	25,0%	14,3%	71

Devices table 5: Profiling game console adopters (N=763)

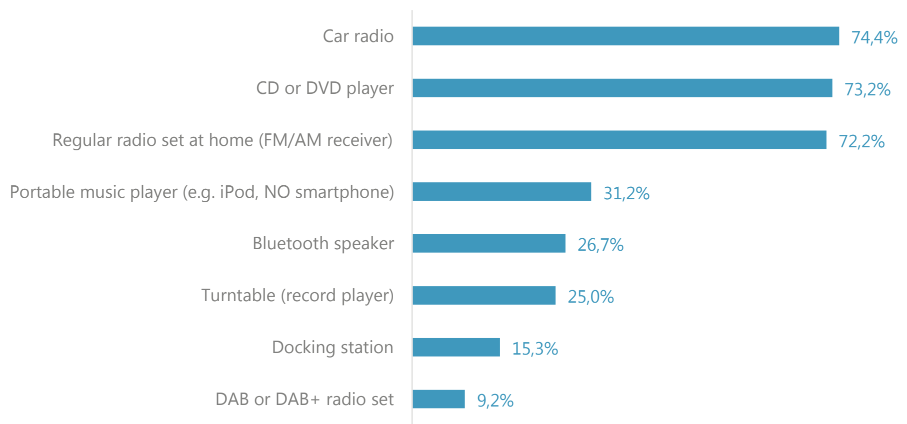
* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 14,0% of all Flemings having access to a game console at home are between 15 and 19 years old. That age group only makes up 6,6% of the total population of Flanders aged 15 or more. The result is an index of 212, which clearly indicates that the youngest age segment is highly overrepresented among Flemings having a game console at home.

RADIO SETS & MUSIC PLAYERS

Over 7 in 10 Flemings have access to a car radio (74,4%), CD/DVD player (73,2%) or a regular radio set (72,2%). A quarter of Flemings have a turntable at home (25,0%), while 9,2% have a DAB or DAB+ radio set at home.

Some 3 in 10 Flemings have a portable music player such as an iPod (31,2%). A quarter of the Flemish population has a Bluetooth speaker or another type of wireless speaker at home (26,7%). A docking station (which can be either a stand alone device or encased in another device such as a radio set) to connect a portable music player, smartphone or tablet with a set of speakers is available in the households of 15,3% of the Flemish population.

RADIO SETS AND MUSIC PLAYERS



Devices graph 35: 'Which of the following radio sets or music players do you have access to within your household?' (N=2.164)

VR HEADSETS & SMART WEARABLES

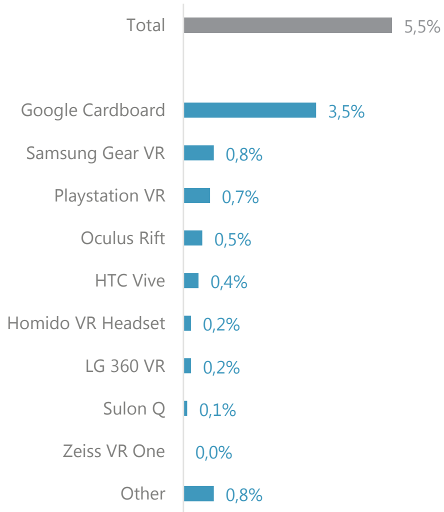
VR HEADSETS

We are still in the early innings when it comes to the uptake of virtual reality (VR) headsets, with 5,5% of the Flemish population having a VR headset at home. The most common brand of headset is not the much-discussed Oculus Rift or HTC Vive, but Google Cardboard. That can be seen as the 'entry model' of VR technology, as it is by far the cheapest way to experience virtual reality. The user has to fold the cardboard into a headset, and slide a smartphone into it (which acts as both a screen and the processor). As you can obtain Google Cardboard for less than €20, it is also a popular marketing incentive to reward loyal customers or to attract new ones. In Flanders, Mediahuis had a remarkable campaign in which every copy of De Standaard newspaper included a free Google Cardboard set on April 23th. That way, De Standaard distributed 135.000 Google Cardboard sets[8].

The adoption rate of other brands of headsets has not yet crossed the threshold of 1%. Note that the PlayStation VR headset was only available for presale when the digimeter survey was conducted.

The Chinese smartphone manufacturer OnePlus distributed a limited stock of free VR headsets at the launch of the OnePlus 3 series. Flemings who were able to get ahold of such a device are included in the 'other' segment.

ADOPTION OF VR HEADSETS



Devices graph 36: 'Do you have a VR headset at home?' (if yes, what is the brand of that headset?) (N=2.164)

[8] Source: Mediahuis

PROFILING VR HEADSET ADOPTERS (N=119)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	8,1%	72,2%	147
Women	3,0%	27,8%	55
Age			
15-19	13,5%	16,2%	245
20-29	8,7%	22,6%	159
30-39	9,5%	26,0%	173
40-49	5,4%	16,0%	98
50-59	5,3%	16,7%	97
60-64	0,8%	1,0%	14
65+	0,3%	1,4%	6
Household members			
1	4,6%	19,6%	84
2	4,5%	28,1%	82
3	5,4%	16,0%	99
4	7,3%	22,7%	134
5	8,8%	10,4%	160
6	3,4%	1,2%	67
More than 6	11,0%	2,0%	200
Household situation			
Single without children	4,3%	18,6%	79
Single with child(ren)	7,4%	8,6%	137
Married/living together without children	4,4%	22,2%	80
Married/living together with children	5,2%	24,1%	95
Living with one or both parents	7,5%	19,2%	137
Living with others	13,5%	7,3%	243
Degree			
No degree or primary education	6,9%	15,6%	127
Lower secondary	3,9%	10,5%	72
Higher secondary	4,1%	32,9%	75
Bachelor	6,8%	20,4%	124
Master	8,7%	20,6%	158
Occupation			
Student	10,9%	24,1%	198
White-collar worker	6,1%	30,4%	112
Blue-collar worker	7,7%	11,6%	141
Public servant/teacher	8,0%	13,4%	146
C-level	8,3%	1,3%	144
Self-employed	13,0%	9,4%	235
Liberal profession	13,5%	2,6%	260
House husband/-wife	0,0%	0,0%	0
Unemployed	2,4%	3,3%	44
Retired	0,5%	2,5%	9
Other	18,7%	1,4%	350
Net income			
€ 1.000 or less	1,5%	0,7%	29
€ 1.001 - € 1.500	3,7%	6,5%	67
€ 1.501 - € 2.000	5,2%	12,9%	94
€ 2.001 - € 3.000	5,1%	14,5%	93
€ 3.001 - € 4.000	6,7%	18,7%	122
€ 4.001 - € 5.000	8,2%	12,0%	150
More than € 5.000	12,2%	9,6%	223
Don't know	3,5%	6,8%	64
Prefer not to say	5,0%	18,3%	91

Devices table 6: Profiling VR headset adopters (N=119)

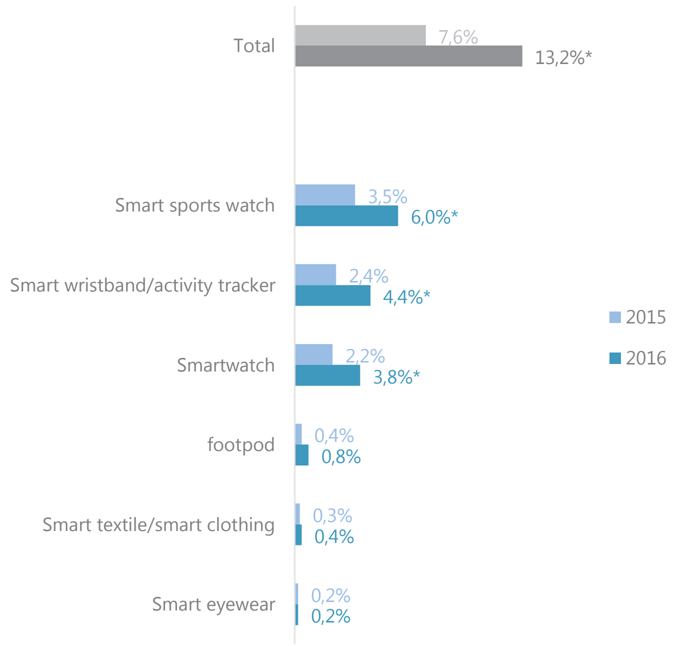
* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 72,2% of all Flemings with a VR headset at home are men, while only 49,0% of the total population of Flanders aged 15 or more is male. The result is an index of 147, which clearly indicates that men are highly overrepresented among Flemings having a VR headset at home.

SMART WEARABLES

The uptake of smart wearables has almost doubled compared to last year, with 13,2% Flemings now owning such a device (+5,6 percentage points). It seems that the emergence of health and sports apps is driving the adoption of smart wearables, as smart sports watches (6,0% of the Flemish population, up 2,5 percentage points) and smart wristbands/activity trackers (4,4%, up 2,0 percentage points) remain the most popular types of smart wearables.

Adoption seems to be driven by highly-educated men with higher net incomes. Remarkably, the uptake of smart wearables by Flemings aged 40-59 seems to be at a similar level to that of younger age groups.

ADOPTION OF SMART WEARABLES



Devices graph 37: 'Do you own one of these types of smart wearables?' (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

PROFILING SMART WEARABLE ADOPTERS (N=287)

	Level of adoption	Profile	Index profile compared with population*
Gender			
Men	17,3%	64,0%	131
Women	9,3%	36,0%	71
Age			
15-19	21,6%	10,7%	162
20-29	16,9%	18,2%	128
30-39	17,9%	20,2%	135
40-49	19,6%	24,2%	148
50-59	16,0%	21,0%	121
60-64	4,7%	2,6%	36
65+	1,8%	3,2%	14
Household members			
1	10,6%	18,6%	80
2	10,5%	27,2%	80
3	15,7%	19,2%	119
4	18,5%	23,6%	140
5	16,8%	8,3%	128
6	10,6%	1,5%	83
More than 6	21,8%	1,7%	170
Household situation			
Single without children	10,5%	18,7%	80
Single with child(ren)	15,0%	7,2%	114
Married/living together without children	9,7%	20,3%	73
Married/living together with children	17,0%	32,6%	128
Living with one or both parents	17,5%	18,4%	131
Living with others	12,3%	2,8%	93
Degree			
No degree or primary education	9,1%	8,5%	69
Lower secondary	9,7%	10,7%	73
Higher secondary	12,8%	42,1%	96
Bachelor	16,5%	20,3%	124
Master	18,7%	18,3%	141
Occupation			
Student	18,7%	17,2%	141
White-collar worker	19,3%	39,6%	146
Blue-collar worker	13,0%	8,1%	99
Public servant/teacher	19,0%	13,2%	143
C-level	34,0%	2,2%	244
Self-employed	20,3%	6,1%	153
Liberal profession	8,8%	0,7%	70
House husband/-wife	7,3%	0,9%	53
Unemployed	10,0%	5,7%	76
Retired	2,7%	5,6%	20
Other	25,2%	0,8%	200
Net income			
€ 1.000 or less	0,9%	0,2%	8
€ 1.001 - € 1.500	7,7%	5,7%	59
€ 1.501 - € 2.000	12,0%	12,5%	91
€ 2.001 - € 3.000	12,6%	14,9%	96
€ 3.001 - € 4.000	20,5%	23,7%	155
€ 4.001 - € 5.000	20,4%	12,4%	155
More than € 5.000	30,0%	9,7%	226
Don't know	9,2%	7,4%	70
Prefer not to say	9,0%	13,7%	68

Devices table 7: Profiling smart wearable adopters (N=287)

* The index is a measurement of representation of a specific segment compared with the population. A value of 100 indicates balanced distribution (i.e. the same ratio as in the overall population). A value lower than 100 indicates underrepresentation; a value greater than 100 points to overrepresentation. For example: 64,0% of all Flemings with access to a smart wearable are men, while only 49,0% of the total population of Flanders aged 15 or more is male. The result is an index of 131, which clearly indicates that men are highly overrepresented among Flemings having a smart wearable.

FREQUENCY OF USING DEVICES

The smartphone is clearly the most intensively-used media device in Flanders. Almost half of smartphone owners use the device for more than 3 hours a day (47,9%); 18,4% even claim to use it for at least 8 hours a day[9]. As with the adoption figures, the GSM has an opposite pattern of use, with 53,4% of the GSM owners in Flanders using it less than daily.

The laptop is more frequently used than the desktop computer. Over 1 in 4 Flemings with access to a laptop at home use it for at least 3 hours a day (27,0%); for desktop owners this is 1 in 5 (20,2%). Most tablet owners use the tablet less frequently, as only 1 in 8 Flemish tablet owners use the tablet for at least 3 hours a day (12,3%). Almost 3 in 10 Flemings with access to a tablet use it for 1 to 3 hours a day (27,9%).

The TV set remains a popular device, with 86,9% using it every day, and 36,1% for even more than 3 hours per day. The DVD or Blu-Ray player encounters competition from other forms of content distribution (downloads, online streaming, etc.), as 63,8% of Flemings may have access to a DVD or Blu-Ray player (see page 4), but 43,9% of them rarely or never use it.

FREQUENCY OF DEVICE USE

	Laptop (N=1.750)	Desktop (N=957)	Tablet (N=1.268)	TV set (N=2.088)	Dvd or Blu-Ray player (N=1.380)	Smartphone (N=1.599)	GSM (N=776)
Never or rarely	9,9%	20,9%	13,5%	3,8%	43,9%	3,8%	20,2%
Less than weekly	10,6%	9,5%	10,5%	2,7%	33,7%	0,4%	7,0%
Less than daily	14,5%	15,4%	15,5%	6,6%	14,1%	2,2%	26,2%
Less than 1h/day	11,5%	12,1%	20,3%	9,5%	4,1%	19,5%	29,5%
1-3h/day	26,6%	21,9%	27,9%	41,3%	3,2%	26,2%	7,3%
3-5h/day	10,3%	9,3%	8,3%	25,4%	0,3%	17,8%	1,9%
5-8h/day	9,3%	7,4%	2,9%	7,3%	0,4%	11,7%	2,3%
More than 8h/day	7,4%	3,5%	1,1%	3,4%	0,3%	18,4%	5,6%

Devices graph 38: 'How frequently do you use these devices?'

FREQUENCY OF DEVICE USE – CONDENSED GRAPH

	Laptop (N=1.750)	Desktop (N=957)	Tablet (N=1.268)	TV set (N=2.088)	Dvd or Blu-Ray player (N=1.380)	Smartphone (N=1.599)	GSM (N=776)
Less than daily	35,0%	45,8%	39,5%	13,1%	91,7%	6,4%	53,4%
Less than 3h/day	38,1%	34,0%	48,2%	50,8%	7,3%	45,7%	36,8%
More than 3h/day	27,0%	20,2%	12,3%	36,1%	1,0%	47,9%	9,8%

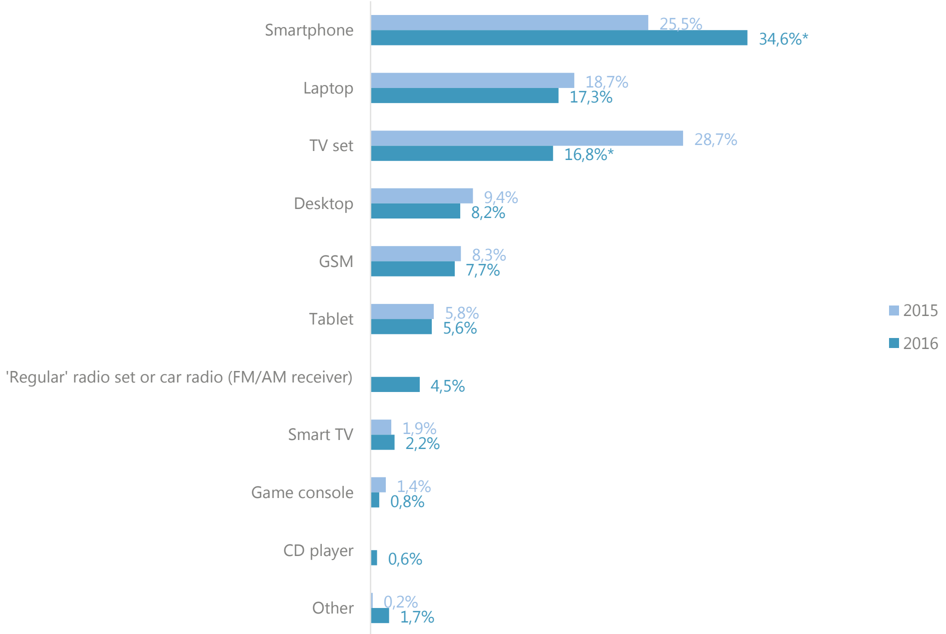
Devices graph 39: 'How frequently do you use these devices?' - condensed graph

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

MOST INDISPENSABLE TECHNOLOGY

The smartphone has become, for an increasing number of Flemings, the most indispensable technology. Over 1 in 3 Flemings claim that they would miss the smartphone the most out of all of their devices (34,6%). This is a significant increase compared to last year, when 1 in 4 Flemings indicated the smartphone as most indispensable device. Moreover, the smartphone has become the most essential device for every age group under 60 years old. A year ago, this was only the case for age groups under 50 years old. The TV set is appearing to lose ground as the most indispensable device.

WHICH TECHNOLOGY WOULD YOU MISS THE MOST?



Devices graph 40: 'Which of the following devices/technologies would you miss the most?' (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

WHICH TECHNOLOGY WOULD YOU MISS THE MOST? – TOP 5 SPLIT BY AGE

	15-19			20-29	
	2015	2016		2015	2016
Smartphone	54,0%	54,7%	Smartphone	42,3%	51,6%*
Desktop	8,1%	10,9%	Laptop	31,1%	24,2%
Laptop	11,6%	10,8%	GSM	5,0%	6,5%
GSM	5,0%	5,9%	Desktop	7,8%	4,0%
TV set	10,6%	3,9%	Tablet	1,6%	3,3%
Other	10,7%	13,8%	Other	12,2%	10,4%

	30-39			40-49	
	2015	2016		2015	2016
Smartphone	38,0%	54,2%*	Smartphone	35,0%	42,9%*
Laptop	22,0%	16,9%	Laptop	16,1%	19,1%
Desktop	9,0%	6,9%	GSM	6,7%	8,6%
TV set	18,7%	5,7%*	Desktop	6,4%	8,1%
GSM	3,1%	4,5%	TV set	21,5%	7,7%*
Other	9,2%	11,8%	Other	14,3%	13,6%

	50-59			60-64	
	2015	2016		2015	2016
Smartphone	14,4%	28,6%*	TV set	40,5%	20,1%*
Laptop	17,0%	18,0%	Smartphone	10,9%	18,7%
TV set	33,9%	14,5%*	Desktop	13,7%	16,6%
GSM	10,7%	9,0%	Laptop	17,1%	14,3%
Tablet	9,4%	9,0%	(Car) radio		9,0%
Other	14,6%	20,9%	Other	17,8%	21,3%

	65+	
	2015	2016
TV set	50,5%	42,6%*
Laptop	14,5%	14,1%
Smartphone	4,8%	9,2%*
GSM	13,3%	9,0%*
Desktop	10,2%	8,2%
Other	6,7%	16,9%

Devices table 8: 'Which of the following devices/technology would you miss the most?' - split by age (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

COMBINATIONS OF SMART DEVICES

Only 6,6% of the Flemish population does not have any smart device (a device that can access the internet) at home. In fact, people tend to have multiple smart devices. Over 7 in 10 Flemings have a computer and a smartphone at home (72,7%). For 12,2%, these are the only smart devices at home; the other 60,5% also have other smart devices at home (e.g. 21,0% have a computer, a smartphone and a tablet at home).

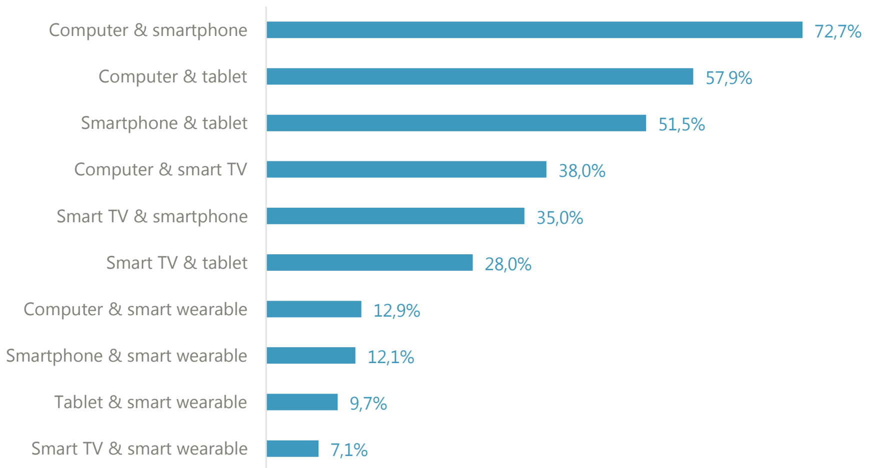
Overall, 31,0% of Flemings have 3 smart devices at home (-2,6 percentage points compared to 2015), with the combination 'computer – smartphone – tablet' as the most popular composition (21,0%). A quarter of Flemings (25,9%) have 4 smart devices at home (6,2 percentage points more than in 2015), with the combination 'computer – smart TV – smartphone – tablet' as the most common composition (20,7%). 1 in 20 Flemings even have access to all 5 types of smart devices (5,6%); in 2015 this was 3,2%.

COMBINATIONS OF SMART DEVICES - DETAILED OVERVIEW

Computer	Smart TV	Smartphone	Tablet	Smart wearable	Description	%
0	0	0	0	0	None of these	6,6%
0	0	0	0	1	Only smart wearable	0,3%
0	0	0	1	0	Only tablet	0,2%
0	0	0	1	1	Tablet and smart wearable	0,1%
0	0	1	0	0	Only smartphone	0,4%
0	0	1	1	0	Smartphone and tablet	0,2%
0	0	1	1	1	Smartphone, tablet and wearable	0,0%
0	1	0	0	0	Only smart TV	0,9%
0	1	1	0	0	Smart TV and smartphone	0,4%
0	1	1	1	0	Smart TV, Smartphone and tablet	0,2%
0	1	1	1	1	Smart TV, smartphone, tablet and smart wearable	0,0%
1	0	0	0	0	Only computer	8,6%
1	0	0	0	1	Computer and smart wearable	0,5%
1	0	0	1	0	Computer and tablet	5,1%
1	0	0	1	1	Computer, tablet and smart wearable	0,2%
1	0	1	0	0	Computer and smartphone	12,2%
1	0	1	0	1	Computer, smartphone and smart wearable	1,3%
1	0	1	1	0	Computer, smartphone and tablet	21,0%
1	0	1	1	1	Computer, smartphone, tablet and smart wearable	3,8%
1	1	0	0	0	Computer and smart TV	2,0%
1	1	0	0	1	Computer, smart TV and wearable	0,1%
1	1	0	1	0	Computer, smart TV and tablet	1,5%
1	1	0	1	1	Computer, smart TV, tablet and wearable	0,0%
1	1	1	0	0	Computer, smart TV, and smartphone	6,7%
1	1	1	0	1	Computer, smart TV, smartphone and smart wearable	1,4%
1	1	1	1	0	Computer, smart TV, smartphone and tablet	20,7%
1	1	1	1	1	All of these	5,6%

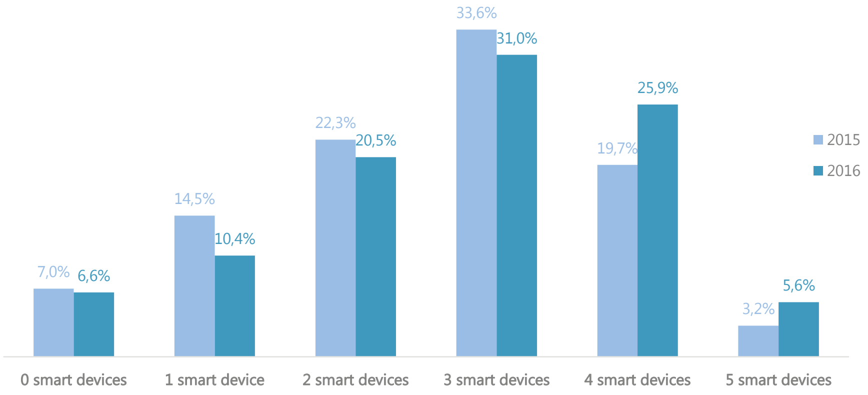
Devices table 9: Overview of combinations of smart devices in households (N=2.164)

COMBINATIONS OF SMART DEVICES



Devices graph 41: Combinations of smart devices (whether or not combined with other smart devices) (N=2.164)

NUMBER OF SMART DEVICES AT HOME



Devices graph 42: Number of smart devices at home (N=2.164)

DEVICES & CONNECTIONS: DIGIMETER PROFILES

DISRUPTOR (24,1%)

The Disruptor is the segment that has shifted the most from traditional media to digital media. They are less likely to make daily use of a TV screen (70%), but show the highest adoption rates of Netflix (28%). Disruptors are big fans of smartphones (high adoption rate (98%), high daily use (99%), most indispensable technology (50%)). They are less likely to own (63%) and use a tablet on a daily basis (50%) compared to the Cumulators and Strugglers. And when they do have a tablet at home, it is more likely to be mainly used by others (21%) compared to among Cumulators (13%) and Strugglers (11%). Game consoles are most prevalent within this segment. Together with Cumulators, this segment shows the highest adoption of smart wearables (19%).

CUMULATORS (38,6%)

Cumulators show high adoption and use rates for both traditional and digital media. They combine digital TV subscriptions (92%) with Netflix accounts (16%). Cumulators own smartphones (100%), but are also likely to have landline subscriptions (69%). Tablets are also omnipresent at home (78%). Remarkably, 41% of Cumulators claim that this is shared with other family members, which is the highest rate across all profiles. Together with Cumulators, this segment shows the highest adoption of smart wearables (17%).

STRUGGLERS (10,9%)

Strugglers are mainly focused on traditional media, but are in the process of exploring digital media, mainly through the tablet. 70% of Strugglers own a tablet. This segment shows the highest share of personally-owned tablets that are rarely shared with others (54%). Compared to the other segments, Strugglers are most likely to use their tablets every day (78%). Surprisingly, this does not necessarily mean that they consider tablets the most indispensable device (14%). Laptops (27%) and TV sets (21%) are more frequently chosen as technology that they cannot do without. Smartphones have not (yet) reached the same level of adoption and use as tablets among Strugglers. In fact, Strugglers are still more likely to have a GSM (95%) than a smartphone (50%).

RESISTORS (26,3%)

Digital media are largely unknown territories to Resistors. Only 69% of them claim to have an internet connection at home, which is by far the lowest rate across all segments. The adoption rates of devices such as the smart TV (19%), computer (68%), smartphone (24%), tablet (21%) and game consoles (12%) are significantly lower compared to all other segments. To this segment, traditional media are key. The TV set is by far the most indispensable device within their households (43%).

TV

	TV set	Only TV tube	Smart TV	Daily use TV set *(filtered on who owns a TV set at home)*	Netflix	Digital TV subscription	Analog TV subscription
Disruptor	94%	4%	45%	70%	28%	79%	14%
Cumulator	99%	5%	52%	92%	16%	92%	15%
Struggler	99%	8%	34%	96%	7%	92%	23%
Resistor	93%	14%	19%	90%	4%	70%	24%

Computer

	Computer (desktop or laptop)	Desktop	Laptop	Daily use desktop *(filtered on who owns a desktop)*	Daily use laptop *(filtered on who owns a laptop)*	Internet connection
Disruptor	99%	49%	90%	56%	68%	99%
Cumulator	99%	45%	96%	53%	72%	100%
Struggler	99%	52%	92%	57%	66%	98%
Resistor	68%	36%	45%	53%	38%	69%

Telephony

	Landline	Regular cell phone (GSM)	Smartphone	Smartphone: iOS *(filtered on who owns a smartphone)*	Smartphone: Android *(filtered on who owns a smartphone)*	Smartphone daily use *(filtered on who owns a smartphone)*
Disruptor	54%	16%	98%	39%	55%	99%
Cumulator	69%	12%	100%	38%	53%	98%
Struggler	79%	95%	50%	35%	49%	72%
Resistor	71%	65%	24%	25%	61%	68%

Tablet

	Tablet	Tablet: iOS *(filtered on who owns a tablet)*	Tablet: Android *(filtered on who owns a tablet)*	Used mainly by myself *(filtered on who owns a tablet)*	Shared with others *(filtered on who owns a tablet)*	Used mainly by others *(filtered on who owns a tablet)*	Daily use *(filtered on who owns a tablet)*
Disruptor	63%	51%	43%	49%	25%	21%	50%
Cumulator	78%	55%	40%	44%	41%	13%	65%
Struggler	70%	42%	47%	54%	33%	11%	78%
Resistor	21%	41%	29%	38%	25%	33%	39%

Game console

	Game console (Fixed or portable)	Fixed game console (connected to TV)	Portable game console
Disruptor	57%	51%	28%
Cumulator	40%	37%	18%
Struggler	28%	23%	17%
Resistor	12%	9%	3%

VR Headset and smart wearables

	VR Headset	Any smart wearable	Smart sports watch	Smart wristband	Smartwatch
Disruptor	8%	19%	9%	6%	6%
Cumulator	7%	17%	8%	6%	4%
Struggler	4%	7%	3%	2%	2%
Resistor	2%	5%	2%	2%	2%

Most indispensable technology

	Smartphone	Regular cell phone (GSM)	Tablet	Laptop	TV set
Disruptor	50%	4%	5%	16%	5%
Cumulator	51%	4%	6%	19%	5%
Struggler	12%	11%	14%	27%	21%
Resistor	6%	14%	2%	12%	43%

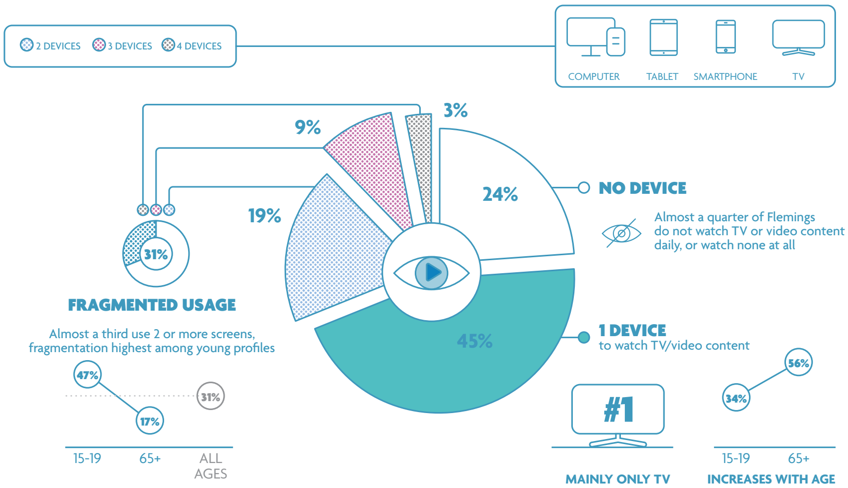
CHAPTER 02

TV & VIDEO

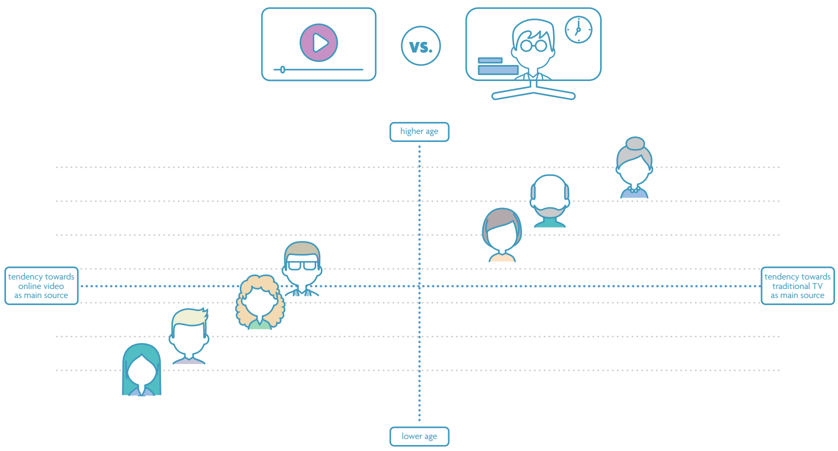
DIGIMETER INFOGRAPHIC

TV & VIDEO
Moving towards online?

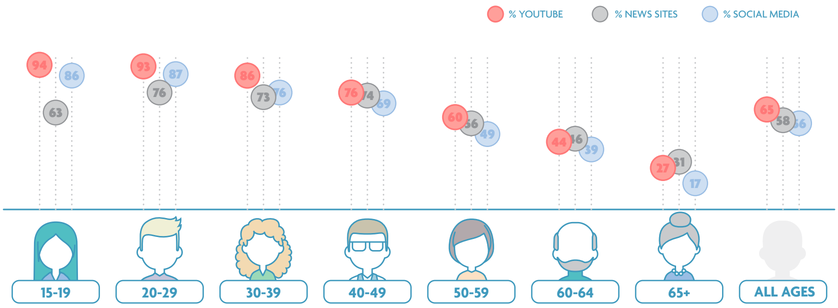
Traditional TV, but more types of devices:
Screens used for tv & video consumption on a daily basis



Online video vs. traditional TV on a daily basis



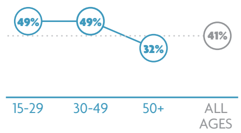
Watching online video:
YouTube, news sites and social media are most common sources



Statements:
Virtual reality, satisfaction & video-on-demand

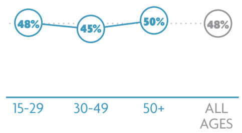
VIRTUAL REALITY

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



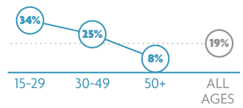
SATISFACTION

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



VIDEO-ON-DEMAND

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



TV & VIDEO

WATCHING TV & VIDEO CONTENT

SCREENS FOR WATCHING VIDEO CONTENT

The television set remains the most important screen for watching video and television content. 66,4% of Flemings with access to a TV set at home indicate that they use the TV screen on a daily basis to watch video content. The smartphone comes in at second place, with 33,1% of Flemish smartphone owners watching video content on a daily basis on their mobile phones. Moreover, the smartphone seems to have overtaken the TV set within the youngest age segment. 59,0% of 15-19 year old Flemings owning a smartphone watch video content on that device on a daily basis, which is slightly more than the 55,7% of 15-19 year old Flemings watching video content on the TV screen on a daily basis. In the other age groups, there is still a clear preference for the TV set. Among Flemings aged 40 years and older, the tablet is as important as the smartphone when it comes to screens for watching video content. Most Flemings with a smartwatch indicate that they never watch video content on that device (80,5%).

When we take a closer look at the screens most commonly used on a daily basis to watch TV or video content (TV set, smartphone, laptop and tablet), we notice that 36,6% of the Flemish population exclusively uses a TV set every day to watch video content. Among Flemings aged 65+, this is even 53,5% of the population. We can conclude that among the oldest age groups, the TV set still plays a central role when it comes to watching TV and video content on a daily basis. Among the youngest age group (15-19 years old), only 15,9% claims to be using the TV set as the single screen to watch video content on a daily basis.

As we saw earlier, the smartphone (59,0%) is a more common device for watching video content on a daily basis than the TV set (55,7%) among the youngest age segment. However, that doesn't mean that 15-19 year olds limit themselves to the use of a smartphone for watching video on a daily basis. Only 9,7% of the 15-19 year old Flemings claim that they use nothing but the smartphone every day for the viewing of video content. In fact, the youngest age groups daily consume video content on multiple screens. This is illustrated in graph 4, where 47% of the 15-39 year old Flemings use at least 2 screens on a daily basis to watch video content. 1 in 5 of the 15-19 year old Flemings even use at least 3 out of the 4 selected screens to watch video content every day (20,7%).

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

	Television set (N=2.088)	Laptop (N=1.750)	Desktop (N=957)	Smartphone (N=1.599)	Tablet (N=1.268)	Smartwatch (N=82)
Never	5,6%	22,3%	35,0%	22,8%	21,2%	80,5%
Rarely	10,4%	22,0%	24,6%	17,3%	24,0%	11,9%
Monthly	3,2%	8,7%	8,0%	6,8%	10,1%	1,3%
Weekly	14,5%	23,4%	18,0%	20,0%	24,9%	3,6%
Daily	66,4%	23,7%	14,3%	33,1%	19,8%	2,8%

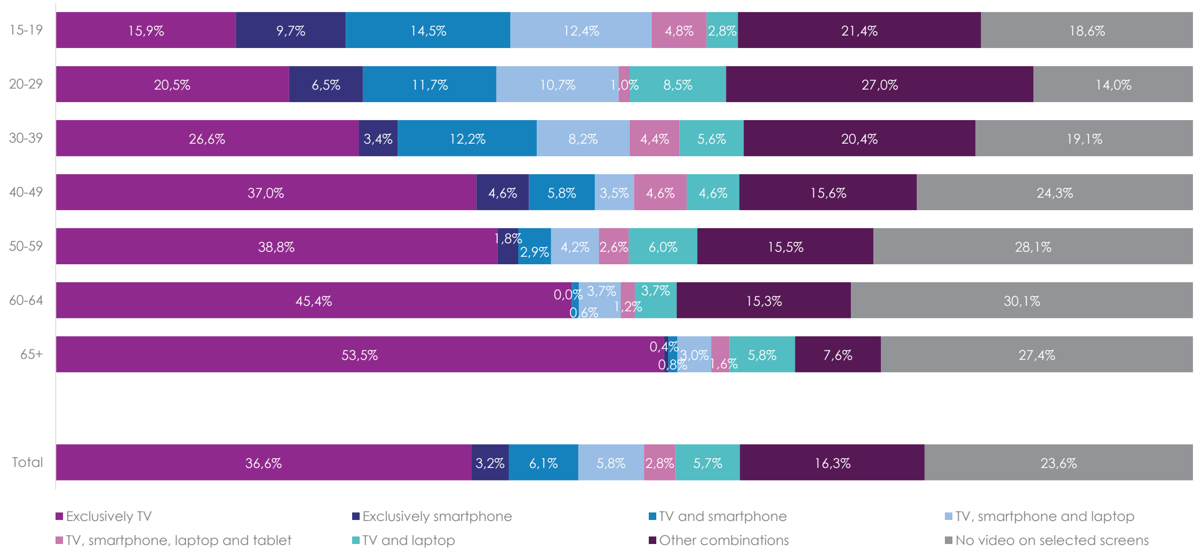
Video graph 1: 'How frequently do you watch video content on the following screens?' (filtered by who has access to these screens within their household)

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

	15-19	20-29	30-39	40-49	50-59	60-64	65+
Television set	55,7%	62,7%	69,4%	62,8%	65,7%	72,7%	70,9%
Laptop	29,5%	40,9%	26,2%	18,8%	16,7%	14,3%	17,6%
Desktop	14,8%	13,7%	20,6%	12,9%	12,3%	11,2%	15,1%
Smartphone	59,0%	46,9%	42,2%	26,8%	19,2%	12,0%	22,0%
Tablet	17,5%	13,8%	25,5%	24,2%	17,5%	27,2%	15,1%
Smartwatch	0,0%	6,2%	6,8%	0,0%	0,0%	0,0%	0,0%

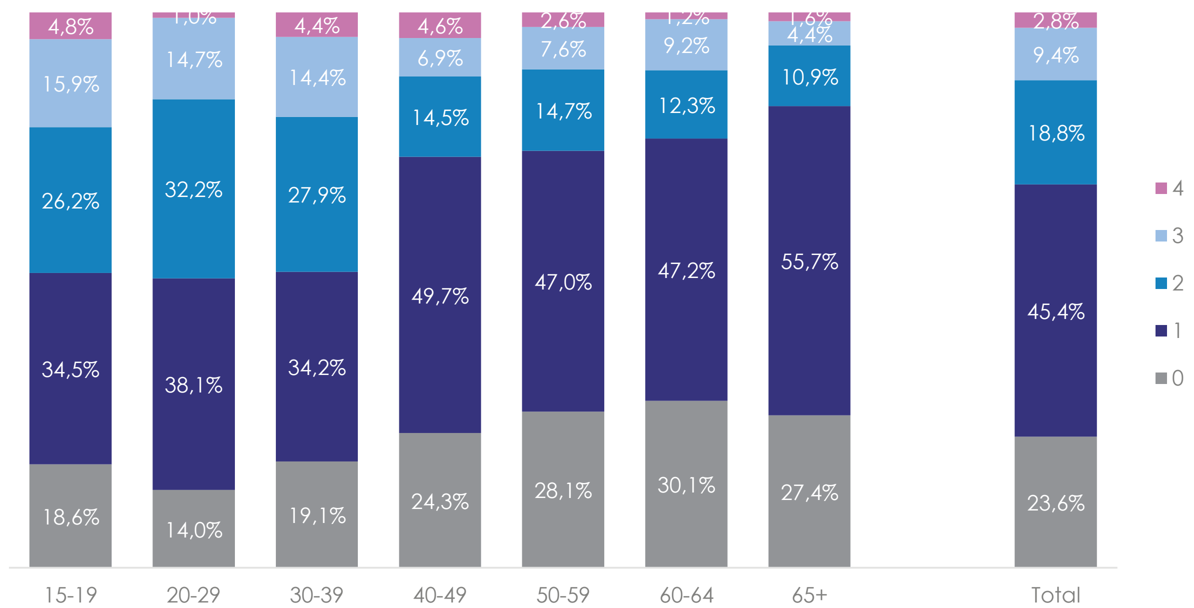
Video graph 2: Daily use of screens to watch video content - split by age group

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



Video graph 3: Combinations of screens used on a daily basis to watch video content (selected screens: TV set, laptop, smartphone and tablet)- split by age group (N=2.164)

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



Video graph 4: Number of screens used on a daily basis to watch video content (selected screens: TV set, laptop, smartphone and tablet)- split by age group (N=2.164)

WAYS TO WATCH TV CONTENT

The most common way to watch TV content remains linear/live programming (watching the program at the time it is aired). 56,6% of Flemish people watch live programming on a daily basis, which is slightly less than a year ago (60,0%). Moreover, the proportion of the population watching linear programming seems to be positively correlated with ascending age: the older the age group, the larger the proportion that watches live television programming.

Timeshifted viewing (delayed viewing, e.g. watching recorded TV programs) remains stable at about 3 in 10 Flemings watching TV some time after it has been aired on a daily basis. Unlike watching live televison, there seems to be no clear relationship with age.

As we concluded in chapter Devices & Connections, 12,1% of the Flemings have access to a Play or Play More account by Telenet. For most people having a subscription to this service, this is not yet a daily habit, as less than 1 in 5 subscribed Flemings use it on a daily basis (17,2%). At the moment, it seems that people from the age group of 30-49 years old are more likely to use this service on a daily basis.

WAYS TO WATCH TV CONTENT[10]

	Ever		Monthly		Daily	
	2015	2016	2015	2016	2015	2016
Live/linear	93,9%	94,3%	81,9%	82,6%	60,0%	56,6%*
Timeshifted viewing	77,9%	80,6%	69,2%	73,5%*	29,6%	29,4%
On demand service of Flemish broadcasters (e.g. iWatch, Net Gemist, Ooit gemist,…)	37,8%	43,8%*	12,4%	19,2%*	1,4%	3,1%*
Pay per view for series and films		43,6%		13,5%		1,3%
Play/Play More (Telenet) *(on Flemings having access to a Play/Play More account, N=262 or 12,1% of population)*		86,6%		71,4%		17,2%
Movies & Series Pass (Proximus) *(On Flemings having access to a Movies & Series Pass account, N=44 or 2,0% of the population)* **		71,2%		53,3%		11,3%
TV apps	28,6%	34,3%*	12,7%	18,1%*	2,0%	3,8%*
DVDs	60,0%	56,9%	23,2%	21,9%	1,3%	2,4%*
Play Sports (Telenet) *(On Flemings having access to a Play Sports account, N=155 or 7,2% of the population)*		76,9%		72,0%		16,4%
Proximus 11/11+ (Proximus) *(On Flemings having access to a Proximus 11/11+ account, N=42 or 2,0% of the population)* **		82,9%		78,2%		6,9%

Video table 1: 'How do you watch TV content?' (N=2.164, except where indicated otherwise)
* Statistically significant change compared to the previous year, based on a chi-square test.
** Due to the low sample size, the results should be taken with caution.

WAYS TO WATCH TV CONTENT (DAILY BASIS) - SPLIT BY AGE GROUP[11]

**	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Live/linear	37,7%	37,0%	39,7%	53,5%	66,3%	67,4%	76,9%	56,6%
Timeshifted viewing	28,2%	25,8%	32,7%	27,1%	35,0%	31,7%	26,8%	29,4%
On demand service of Flemish broadcasters (e.g. iWatch, Net Gemist, Ooit gemist,…)	3,4%	3,2%	3,2%	2,1%	4,2%	3,9%	2,4%	3,1%
Pay per view for series and films	2,5%	2,9%	1,2%	1,9%	0,3%	0,5%	0,8%	1,3%
Play/Play More (Telenet) *(on Flemings having access to a Play/Play More account, N=262 or 12,1% of population)*	11,5%	11,8%	25,8%	21,3%	17,3%	0,0%	17,2%	17,2%
TV apps	10,8%	6,7%	4,2%	4,6%	2,0%	3,3%	0,5%	3,8%
DVDs	5,9%	3,8%	1,5%	2,2%	0,7%	3,5%	2,1%	2,4%
Play Sports (Telenet) *(On Flemings having access to a Play Sports account, N=155 or 7,2% of the population)*	0,0%	14,1%	10,4%	24,7%	11,3%	0,0%	35,4%	16,4%

Video table 2: 'How do you watch TV content?' (daily basis) - split by age (N=2.164, except where indicated otherwise)
** Due to low sample size, two items ("Movies & Series Pass" and "Proximus 11/11+") were excluded from analysis.

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

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

FREQUENCY OF WATCHING ONLINE VIDEO

Almost 2 in 3 Flemings watch videos on YouTube on a monthly basis. Younger generations in particular are loyal users of this platform, with at least 85% of Flemings younger than 40 years old using YouTube at least once every month.

However, on a daily basis, YouTube is not the most popular online video platform. Social media (34,7%) and news sites (28,3%) seem to be a daily source for videos for a larger segment of Flemings than YouTube (22,4%) (with the remark that most of the videos shared on social media and published on news sites are in fact embedded videos from YouTube).

People with Netflix accounts tend to use the service quite often. 1 in 3 Netflix users watch Netflix content on a daily basis (33,2%), and 89,8% use it at least once a month. These high figures can be partly explained by the flexible subscription formula of Netflix. Subscribers can easily put their Netflix subscriptions on hold, and just as easily resume the subscription when intending to view Netflix content again.

The efforts of Flemish broadcasters to invest in online platforms and mobile applications as alternative distribution channels for their content seem to be paying off, as 1 in 3 Flemings (especially the younger segments) use this at least once every month (31,7%).

Despite the wide coverage these platforms generate on news media, illegal distribution platforms such as Popcorn Time and torrent websites seem to remain quite niche. Only 5,9% of the Flemish population uses Popcorn Time at least on a monthly basis, and 11,1% has ever used this platform. This figure indicates that Flemings seem to be slightly less familiar with Popcorn Time than their northern neighbors, as 17% of Dutch people have used this service[12]. One of the reasons for this low uptake of Popcorn Time could be due to the fear of sanctions when one is caught using the platform. Another reason could have a more practical nature: as Popcorn Time is an illegal platform, it has been taken down several times by various governments. As a result, the service has had to change its domain quite a few times to remain in business, making it difficult to keep track of. However, this doesn't appear to deter the youngest generation, as 27,8% of Flemings aged 15-19 years old claim to use Popcorn Time every month. Torrent sites seem to be mainly popular with the younger age groups. It is remarkable that downloading content from torrent sites seems to be more popular among 20-29 year olds, while 15-19 year olds appear to prefer streaming content via Popcorn Time.

FREQUENCY WATCHING ONLINE VIDEO

	Ever	Monthly	Daily
YouTube	80,1%	64,5%	22,4%
Vimeo	25,7%	11,4%	0,9%
Social media	65,2%	56,1%	34,7%
News sites	69,9%	58,2%	28,3%
Website/app of TV station (e.g. VTM.be, Canvas.be,…)	53,6%	31,7%	9,0%
Stievie Free	9,6%	4,3%	0,7%
Popcorn Time	11,1%	5,9%	0,8%
Stremio	3,5%	1,5%	0,2%
Torrent sites	15,0%	9,5%	1,4%
Netflix *(filtered on having access to a Netflix subscription, N=315 or 14,5% of the total population)*	95,6%	89,8%	33,2%

Video table 3: Frequency of watching online video via listed platforms (N=2.164, except where indicated otherwise)

[12] Source: Telecompaper

WATCHING ONLINE VIDEO (MONTHLY BASIS) - SPLIT BY AGE

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
YouTube	93,8%	92,7%	85,7%	75,8%	60,0%	44,4%	26,7%	64,5%
Vimeo	6,6%	20,4%	20,7%	16,3%	6,9%	6,1%	2,5%	11,4%
Social media	86,1%	86,5%	76,0%	69,2%	49,3%	39,4%	17,0%	56,1%
Newssites	63,2%	76,2%	72,7%	73,5%	56,1%	46,3%	30,9%	58,2%
Website/app of TV station (e.g. VTM.be, Canvas.be,…)	40,5%	52,1%	37,9%	35,1%	28,4%	22,9%	15,6%	31,7%
Stievie Free	11,5%	6,0%	4,9%	5,6%	4,0%	1,9%	0,9%	4,3%
Popcorn Time	27,8%	15,3%	5,5%	3,2%	1,8%	1,4%	0,4%	5,9%
Stremio	8,0%	5,2%	0,7%	0,0%	0,1%	0,0%	0,4%	1,5%
Torrent sites	22,8%	31,0%	12,4%	6,6%	2,2%	2,2%	0,4%	9,5%
Netflix (filtered on having Netflix subscription, N=315)	93,7%	95,1%	94,2%	94,6%	71,7%	100,0%	64,8%	89,8%

Video table 4: Watching online video (monthly basis) - split by age (N=2.164, except where indicated otherwise)

TRADITIONAL TV VERSUS ONLINE VIDEO

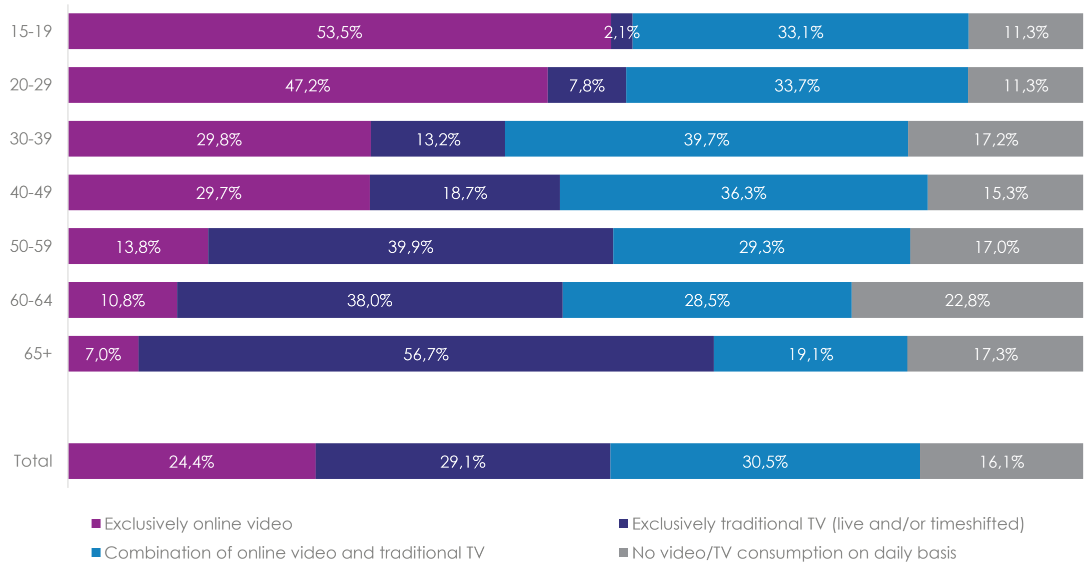
83,9% of the Flemish population watches TV or online video content on a daily basis. For a quarter of the population (24,4%) daily video consumption solely consists of online videos and no traditional TV. In contrast, 29,1% of the Flemings only consume traditional TV content (either through live or timeshifted viewing) on a daily basis. 3 in 10 Flemings combine online video with traditional TV every day (30,5%).

There are some remarkable age differences. The share of people exclusively watching online video on a daily basis is highest among the youngest age groups (53,5% among 15-19 year old Flemings and 47,2% among 20-29 year old Flemings). As such, online video dominates the daily video consumption within those segments.

The share of people only watching traditional TV (either live or timeshifted) on a daily basis is highest among Flemings aged 50+ (39,9% among 50-59 year old Flemings, 38,0% among 60-64 year old Flemings, and even 56,7% among Flemings aged 65+). As a result, watching traditional TV is the most common way within the oldest segments to consume video on a daily basis.

Flemings aged 30-49 years old are on the intersection of online video and traditional TV. They show the highest share of combining both online video and traditional TV on a daily basis (39,7% among 30-39 year old Flemings, and 36,3% of the 40-49 year olds).

WATCHING TRADITIONAL TV VERSUS ONLINE VIDEO ON A DAILY BASIS - SPLIT BY AGE



Video graph 5: watching traditional TV versus online video on a daily basis - Split by age group (N=2.164)

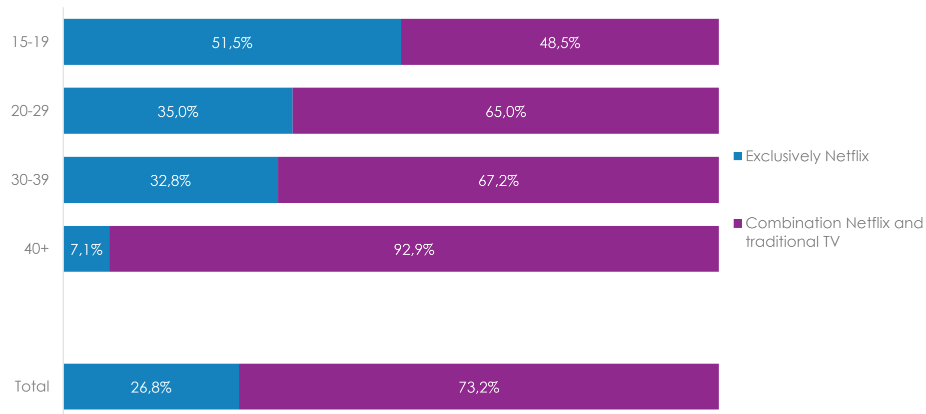
NETFLIX: ON TOP OR INSTEAD OF TRADITIONAL TV?

14,5% of the Flemings have access to a Netflix account (see chapter Devices & Connections). Among those Netflix users, 74,8% watch Netflix content on a weekly basis (in other words: 10,9% of the total Flemish population watches Netflix on a weekly basis). How does this relate to watching traditional TV content (through live TV or timeshifted TV)? Are Netflix users ditching traditional TV in favor of Netflix or do they combine both Netflix and traditional TV?

In general, 73,2% of the Flemings who use Netflix on a weekly basis also watch TV content every week (either through live TV or timeshifted viewing). To them, Netflix is an addition to the content provided by TV broadcasters.

However, this means that for a quarter of the Flemings who use Netflix every week, Netflix is considered to be more or less a substitute for traditional TV content (26,8%). Among 15-19 year old weekly Netflix users this share is even 51,5%. This can be related to the fact that 34,2% of the youngest age group agree most that Netflix serves as a substitute for traditional TV, which is the highest share of all age groups (see further on this chapter).

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



Video graph 6: Share of exclusively watching Netflix vs. combining Netflix with traditional TV (either live or timeshifted viewing) (of Flemings watching Netflix on a weekly basis, N=235)

LIVE VIDEO STREAMING

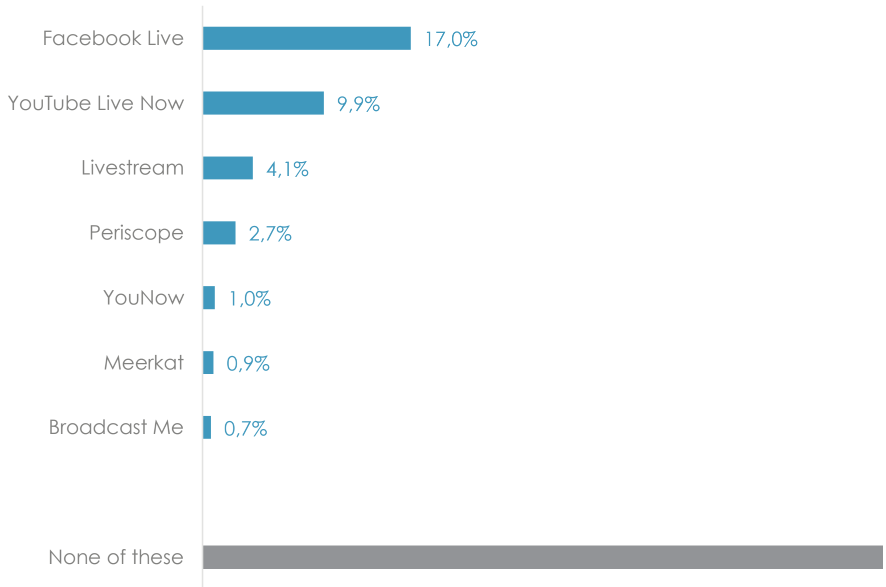
USING LIVE VIDEO STREAMING PLATFORMS

Over half of the Flemings (54,9%) watch online video on a daily basis (see graph 5 in this chapter). Publishing live video streams is an emerging trend in this domain.

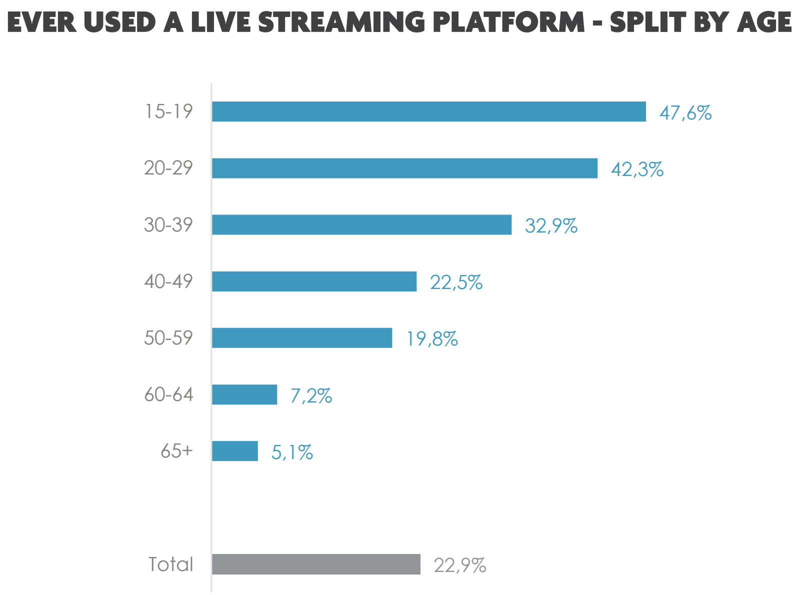
Over 1 in 5 Flemings have watched or broadcasted a live video stream online (22,9%). Facebook Live is by far the most popular platform (17,0%), followed by YouTube Now (9,9%). Periscope (which is owned by Twitter) has been used by 2,7% of the Flemish population. Meerkat, the pioneer that started the hype 2 years ago and has recently shut down, has been used by only 0,9% of Flemings.

Not surprisingly, live streams are especially popular within the youngest age segments. These are the segments that also are most active on social media, and have more experience in watching online videos. Almost half of 15-19 year olds claim to have watched or broadcasted a live stream (47,6%). Among 20-29 year olds this is still over 4 in 10 (42,3%).

WHICH OF THE FOLLOWING LIVE STREAMING PLATFORMS HAVE YOU EVER USED, EITHER TO WATCH LIVE FOOTAGE OF OTHERS OR TO STREAM A LIVE VIDEO YOURSELF?



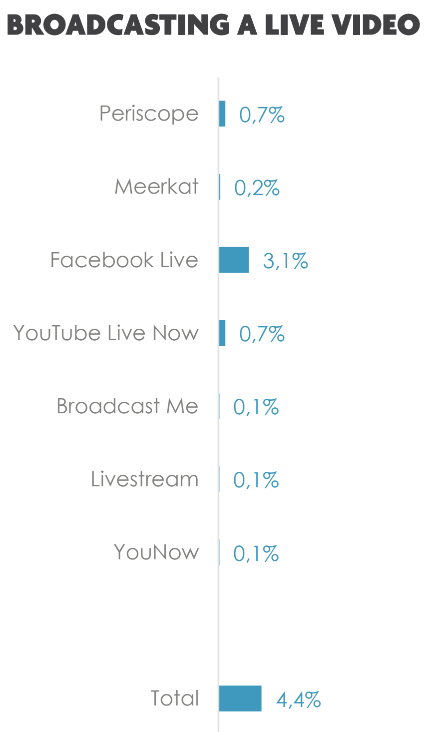
Video graph 7: 'Which of the following live streaming platforms have you ever used, either to watch live footage of others or to stream a live video yourself?' (N=2.164)



Video graph 8: 'Which of the following live streaming platforms have you ever used, either to watch live footage of others or to stream a live video yourself?' - split by age group (N=2.164)

BROADCASTING A LIVE VIDEO

Using a live streaming service does not necessarily mean broadcasting a live stream yourself. Most people use those platforms only to watch live streams. As most of those services are (directly) linked to a social network, it is no surprise that a substantial portion of the population is confronted with the live streams of other users (and it is therefore not surprising that Facebook Live, which takes advantage of Facebook's huge user base to distribute its live videos, is by far the most popular live streaming platform). But it is still difficult to encourage people to broadcast their own streams: only 4,4% of Flemings have ever broadcasted a live stream themselves. Facebook Live is the only service on which more than 1% of the Flemish population has ever broadcasted a live video (3,1%).



Video graph 9: 'Have you ever broadcasted a live streaming video yourself via one of these live streaming platforms?' (N=2.164)

STREAMING/DOWNLOADING FILMS & SERIES

FREQUENCY OF STREAMING/DOWNLOADING FILMS & SERIES

The share of Flemings streaming films and series on a monthly basis has increased significantly (26,2% in 2016, compared to 22,9% in 2015). Streaming is still the more popular way to watch online audiovisual content. Over a quarter of Flemings stream movies and series on a monthly basis (26,2%), while fewer than 1 in 5 Flemings download films and series every month (18,6%).

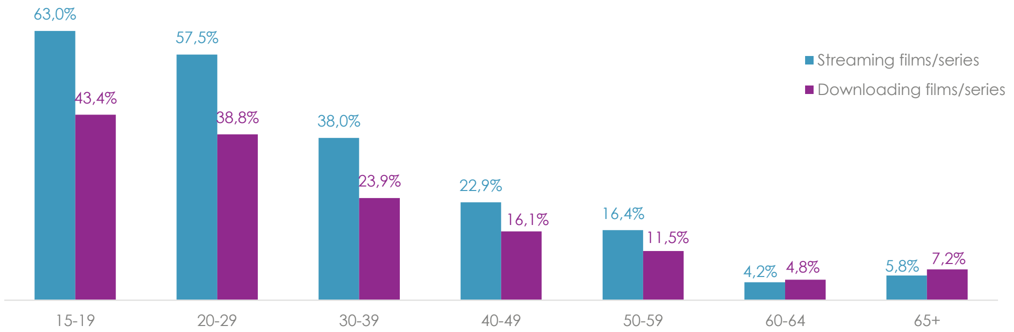
There is a clear relationship with age, as downloading and streaming films and series on a monthly basis decreases with an increasing age. Moreover, the divide between streaming on one hand and downloading on the other is much more pronounced within the youngest age groups than within older age groups. For instance, the divide between streaming (63,0%) and downloading (43,4%) audiovisual content is 19,6 percentage points (in favor of streaming content) within the youngest age group (15-19 years old), while there is no significant difference between downloading (7,2%) and streaming (5,8%) films and series within the oldest age group (65+).

FREQUENCY OF DOWNLOADING/STREAMING FILMS AND SERIES

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

Video table 5: 'How frequently do you download and/or stream series and movies?' (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

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



Video graph 10: Streaming/downloading series and movies on monthly basis - split by age group (N=2.164)

LEGAL VS. ILLEGAL STREAMING/DOWNLOADING SERIES AND MOVIES

Streaming films and series seems to happen more often in a legal way than downloading (or at least it is perceived to be that way). 60,7% of Flemings who have ever streamed a film or series claim to do this primarily in a legal way, while only 44,3% of Flemings who have ever downloaded audiovisual content make the same claim. Compared to last year, both streaming and downloading films and series seem to have shifted toward legal methods of obtaining that content (according to Flemish perception).

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

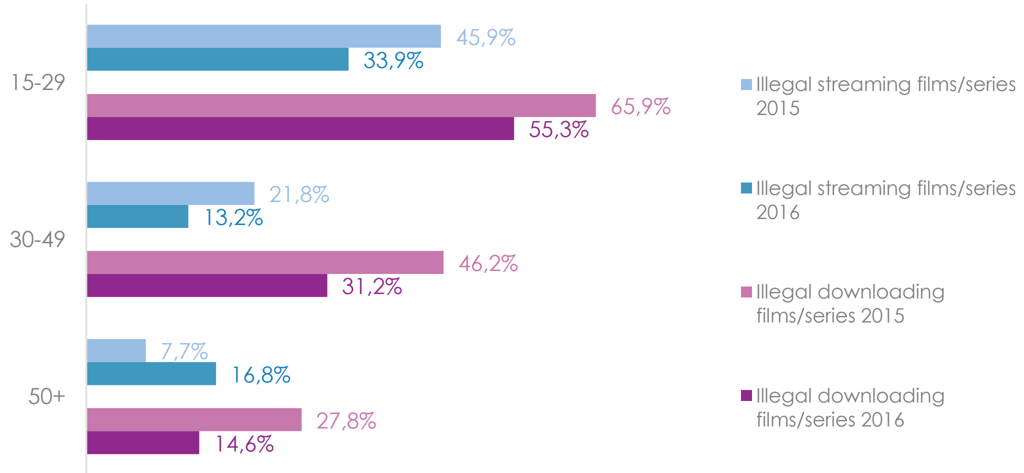
LEGAL VS. ILLEGAL STREAMING/DOWNLOADING SERIES AND MOVIES

	Only/mainly legal		Both legal and illegal		Only/mainly illegal	
	2015	2016	2015	2016	2015	2016
Streaming films/series	51,9%	60,7%*	17,7%	16,8%	30,3%	22,5%*
Downloading films/series	31,2%	44,3%*	16,4%	17,9%	52,4%	37,7%*

Video table 6: 'To what extent do you download and/or stream series and movies in a legal or an illegal way?' (of people ever streaming (N=806) or downloading (N=755) series and movies)

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

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



Video graph 11: Proportion only/mainly illegal streaming or downloading films and series (of people ever streaming (N=806) or downloading (N=755) series and movies), split by age group

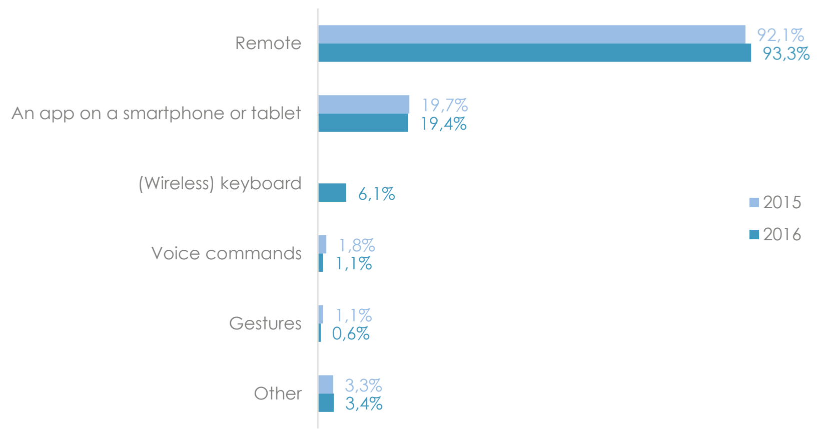
SMART TV: OPERATION & APP USAGE

39,6% of the Flemings have a smart TV at home, a significant increase compared to the 29,2% in 2015 (see chapter Devices & Connections). But how are they using the smart TV? Are they operating the smart TV in a 'smart' (connected) way, or do they use it as a regular TV set?

OPERATING SMART TVS

Compared to last year, there is no significant shift in ways of operating smart TVs. Flemish smart TV owners predominantly use a regular remote control (93,3%). 1 in 5 Flemings with a smart TV at home state using a smartphone or tablet app to control the smart TV (19,4%). 6,1% make use of a (wireless) keyboard to use the smart TV. More advanced features related to smart TV operation such as voice command sensors (1,1%) or cameras detecting gestures (0,6%) are still far from commonplace.

HOW DO YOU OPERATE YOUR SMART TV?



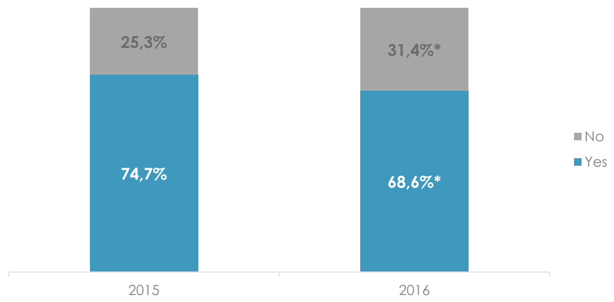
Video graph 12: 'How do you operate your smart TV?' (of people with a smart TV within their household, N=856)
* Statistically significant change compared to the previous year, based on a chi-square test.

USING APPS ON THE SMART TV

Fewer than 7 in 10 of Flemings with a smart TV at home state to have ever used an app on that device (68,6%). That is a significant decrease compared to 2015, when 74,7% of the people with a smart TV at home had used a smart TV app. This is related to the quick adoption rate of smart TVs. More than half of the television sets sold worldwide are smart TVs[13]. Smart TVs are not only bought by people who plan to use internet on their TV set, but more often just because those TV sets offer an attractive price vs. quality ratio. These types of smart TV owners are not inclined to use internet applications on their TV sets, but simply want a nice screen to watch regular TV programming. In that way, it is not surprising that a leap in smart TV ownership leads to a decreased proportion of users that actually use their TV set as a "smart TV".

The order of the most frequently-used apps has not changed compared to last year. Video content platforms Netflix and YouTube remain the most frequently-used apps, as 1 in 5 Flemings with a smart TV within their household use one of both apps at least once a week. 14,8% claim to use a social media app on their smart TV on a weekly basis.

EVER USED AN APP ON YOUR SMART TV



Video graph 13: 'Ever used an app on your smart TV?' (of people with a smart TV within their household, N=856)
* Statistically significant change compared to the previous year, based on a chi-square test.

FREQUENCY OF USING APPS ON SMART TV

	Ever		Monthly		Weekly	
	2015	2016	2015	2016	2015	2016
Netflix	27,8%	**29,2%**	20,0%	**23,3%**	17,5%	**19,7%**
YouTube	56,0%	**48,8%***	30,6%	**29,1%**	18,7%	**19,6%**
Social media	24,6%	**25,2%**	12,4%	**16,5%***	11,0%	**14,8%***
Program guide**	25,2%	**21,9%**	12,6%	**15,2%**	10,8%	**12,0%**
Browser	36,4%	**28,9%***	13,9%	**14,7%**	8,5%	**10,9%**
Recording programs**	20,8%	**20,5%**	11,0%	**14,1%**	9,0%	**10,3%**
Music app	23,9%	**25,9%**	12,4%	**14,7%**	8,0%	**10,2%**
Games	13,5%	**14,5%**	6,2%	**8,7%**	5,5%	**6,6%**
DLNA *(wireless transmitting files from another device to the smart TV)*	32,0%	**20,0%***	16,1%	**9,4%***	8,8%	**5,2%***
Video chat	20,9%	**17,9%**	9,5%	**7,6%**	5,5%	**3,5%**
Other	5,7%	**3,5%**	3,3%	**1,6%***	2,4%	**1,4%**

Video table 7: 'How often do you use the following apps on a smart TV?' (of people with a smart TV within their household, N=856)
* Statistically significant change compared to the previous year, based on a chi-square test.
** Not through the digital TV set-top-box, but via the menu of the smart TV.

13 Source: IHS (http://news.ihsmarkit.com/press-release/technology/smart-tv-surge-more-half-tvs-shipped-globally-q1-2016-were-smart-ihs-says)

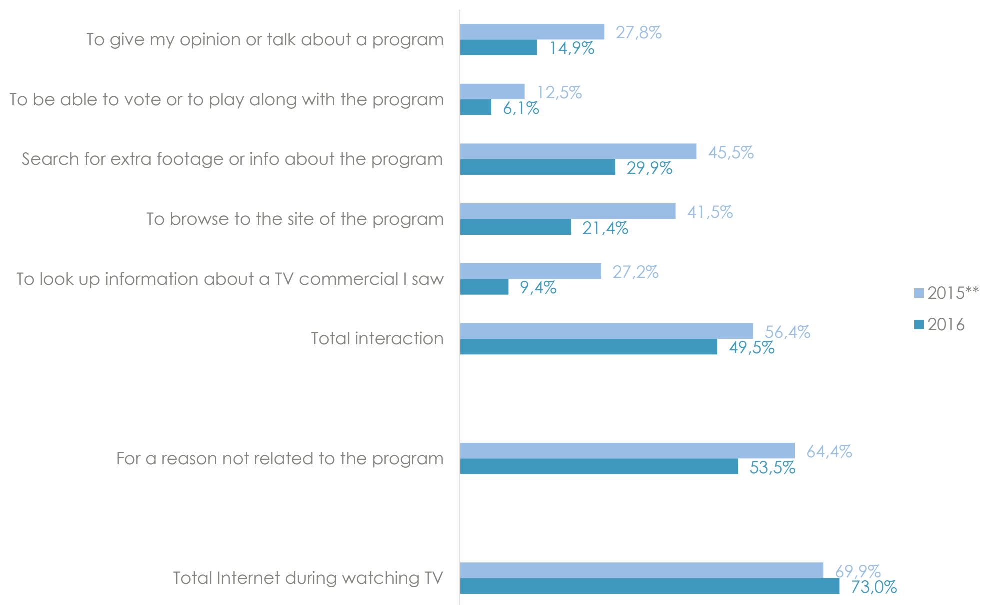
MULTITASKING: USING INTERNET WHILE WATCHING TV

Using the internet on one device (e.g. smartphone) while watching TV content on another device (e.g. TV set) remains a widespread phenomenon in Flanders. Almost 3 in 4 Flemings claim to have engaged in an internet-related task while watching a TV program on another screen (73,0%, compared to 69,9% in 2015).

Comparison with 2015 has to be approached with caution[14]. However, the same conclusion can be drawn: Searching for extra footage or information about a program and surfing to the website of a program remain the most popular ways to engage with the program. And just as in previous years, the 'second screen' seems to be more of a distraction from the main screen (53,5% claim to have performed an internet-related task that had nothing to do with the program, e.g. reading e-mails) than as a way to enrich or to interact with the program (49,5%).

Multitasking seems to occur within every age group, as even almost half of Flemings aged 65 and older claim to have multi-tasked in the previous month (46,8%).

USE OF INTERNET WHILE WATCHING TV

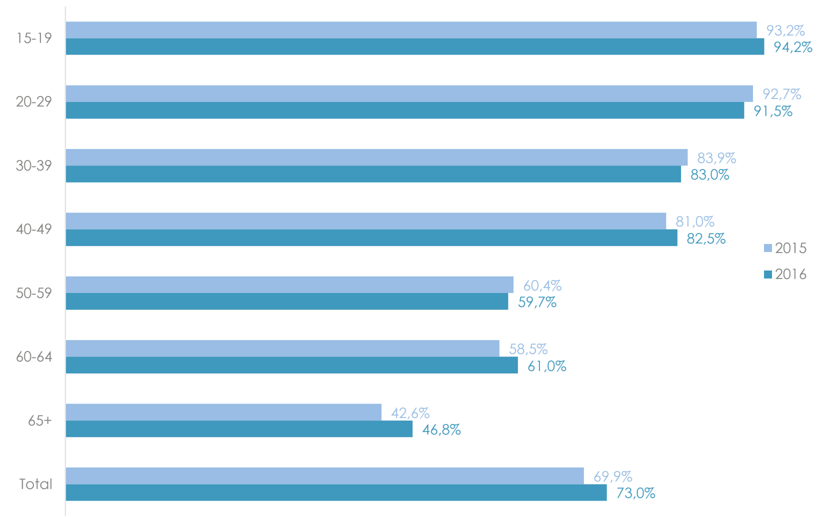


Video graph 14: 'Have you performed an internet-related task while watching TV in the past month?' (N=2.164)

** Comparison with last year should be approached with caution. As the formulation of the question has been changed (i.e. the respondent didn't have to make a distinction between devices anymore), a substantial number of respondents interpreted the question as to only give the most important/most frequently performed internet-related task. In fact, 49% of the respondents only indicated 1 answer (in 2015, this was merely 23%). On the other hand, only 21% of the respondents indicated 3 answers or more; in 2015 this was 60% of the respondents. This explains why the total proportion of people using the internet while watching TV has increased, while the percentage per item seems to have decreased.

14 We would like to point out that this question has been reformulated compared to the previous year. While respondents used to fill in a matrix crossing devices and internet-related tasks (e.g. indicating that you have used a smartphone to share your opinion about the program), the distinction between devices has been dropped this year (so respondents only had to indicated what activities they have done while watching a TV program). It seems that this reformulation has caused a substantial part of the respondents to interpret this as to only indicate the most important/most frequently-performed task while watching TV. See the note attached to Video graph 10 for more details on this subject.

USE OF INTERNET WHILE WATCHING TV - SPLIT BY AGE GROUP



Video graph 15: 'Have you performed an internet-related task while watching TV in the past month?' - split by age group (N=2.164)

OPINION ON WATCHING TV & VIDEO CONTENT

A substantial share of the Flemish population agrees that virtual reality has the potential to become an important tool for experiencing media content (40,6%). Only 14,7% are convinced that VR will not live up to the expectations (or at least not within 5 years). Flemings younger than 50 years old particularly seem to believe in the potential of VR.

Overall, Flemings are satisfied with the offerings of traditional TV stations (48,1%), Netflix (57,2%) and Telenet Play/Play More (46,2%). This implicates that Flemings still believe that traditional TV stations have their place next to on-demand forms of audiovisual content. In other words, they see services as Netflix and Telenet Play/Play More as supplements to traditional TV stations, rather than substitutes. This is confirmed by the fifth statement, as only 18,9% of Flemings agree that video-on-demand services act as alternatives for traditional TV stations. However, it is worth pointing out that within the youngest age segment (15-29 years old), over 1 in 3 people do see those on-demand services as replacements for traditional TV broadcasting (34,2%).

Most Flemings don't see added value in collecting physical carriers of audiovisual content (e.g. DVDs, Blu-Ray disks, etc.), as only 13,0% agree that they would rather spend money on DVDs than on digital on-demand services. Moreover, this feeling seems to be shared among all age groups.

It seems that a substantial part of the population still has clear preferences as to which screens they would rather use to watch video content. 29,7% state that they watch videos on any screen. Over 1 in 3 Flemings (totally) disagree with this statement. It seems that specifically Flemings aged 50 years and older are not convinced that every screen will do when it comes to watching video content, as only 23,0% agree with this statement.

OPINION ON WATCHING VIDEO & TV CONTENT

	(Totally) disagree	Neutral	(Totally) agree
Within 5 years, VR will be an important type of entertainment	14,7%	44,7%	40,6%
I am satisfied with the programming on Flemish TV stations	24,9%	27,0%	48,1%
I am satisfied with the offering of films and series on Play/Play More (Telenet) *(on Flemings having access to a Play/Play More account, N=262)*	19,1%	34,7%	46,2%
I am satisfied with the offering of films and series on Netflix *(on Flemings having access to a Netflix account, N=315)*	17,9%	24,6%	57,2%
To me, video-on-demand services such as Netflix are substitutes for traditional TV stations	33,0%	48,0%	18,9%
I would rather spend money on DVDs than on a digital on-demand service such as Netflix	46,0%	41,0%	13,0%
It doesn't matter to me which device I use to watch video content	36,5%	33,8%	29,7%

Video table 8: 'To what extent do you agree with the following statements?' (on a 5-point scale) (N=2.164, except where indicated otherwise)

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

	15-29	30-49	50+	Total
Within 5 years, VR will be an important type of entertainment	49,3%	48,5%	31,6%	40,6%
I am satisfied with the programming on Flemish TV stations	47,7%	45,1%	50,2%	48,1%
I am satisfied with the offering of films and series on Play/Play More (Telenet) *(on Flemings having access to a Play/Play More account, N=262)*	64,4%	44,7%	33,7%	46,2%
I am satisfied with the offering of films and series on Netflix *(on Flemings having access to a Netflix account, N=315)*	51,6%	61,6%	57,1%	57,2%
To me, video-on-demand services such as Netflix are substitutes for traditional TV stations	34,2%	25,4%	8,1%	18,9%
I would rather spend money on DVDs than on a digital on-demand service such as Netflix	15,6%	14,2%	11,1%	13,0%
It doesn't matter to me which device I use to watch video content	35,5%	36,1%	23,0%	29,7%

Video table 9: Share (totally) agree with the statements (on a 5-point scale) - split by age group (N=2.164, except where indicated otherwise)

TV & VIDEO: DIGIMETER PROFILES

DISRUPTOR (24,1%)

For Disruptors, audiovisual content is mainly consumed in the form of online video. They are less likely to watch live TV broadcasting on a weekly basis (31%). It may come as no surprise that, of all segments, Disruptors are the least satisfied with the content shown on Flemish TV stations (41%). In fact, they think that Video On Demand services such as Telenet Play More or Netflix serve as substitutes for traditional broadcasting (35,1%). In contrast to the low frequency of watching traditonal TV broadcasting, they do frequently watch online video (84,1% on a weekly basis). YouTube (75%) and social media (69,6%) are popular platforms for streaming online video on a weekly basis. Watching videos on news websites (52%) or on websites or via apps of Flemish TV stations (20%) are less popular among Disruptors compared to Cumulators and Strugglers. Disruptors are more familiar with illegal platforms for downloading or streaming content than all other segments. 14% of Disruptors download video content through torrent websites every week, while 6% use Popcorn Time at least once per week.

Disruptors show the highest rate of streaming films and series weekly (35%) compared to other segments. Downloading films and series (19%) is a less common practice compared to streaming, but Disruptors are still more likely to do this on a weekly basis compared to other segments.

CUMULATOR (38,6%)

Typical for Cumulators is that they consume a high amount of both digital and traditional media. This is also apparent when it comes to watching audiovisual content. 89% of the Cumulators watch live TV at least once per week, while 74% watch online video on a weekly basis. Remarkably the platform most frequently used to watch online video is not YouTube (64%) or social media (67%) but news websites (73%). Cumulators are as satisfied with the content offered by both Flemish broadcasters (53%) as with Netflix (59%). In contrast to Disruptors, Cumulators are less convinced that Video On Demand services could replace TV broadcasting (20%, compared to 35% among Disruptors). To them, services like Netflix act as a supplement to traditional TV broadcasting.

STRUGGLER (10,9%)

Strugglers are most familiar with more traditional forms of video content consumption (73% watch live programming on a weekly basis, and 74% watch TV content on a TV set every day), but that doesn't mean that they don't explore alternative ways of consuming video. With 26% of Strugglers watching TV or video content on a laptop on a daily basis, they are in line with Disruptors (27%) and Cumulators (27%). Watching content on a smartphone every day is somewhat lower (30%) compared to Disruptors and Cumulators (both 36%), but they are by far the biggest consumers of video content via a tablet (31%, compared to 15% among Disruptors and 22% among Cumulators).

Some 2 in 3 Strugglers watch online video at least once a week (68%). The three main sources are news sites (56%), YouTube (55%) and social media (54%). 30% of Strugglers watch video content through an app or website of a Flemish TV station every day.

Together with Cumulators, Strugglers show the highest satisfaction levels in terms of the content broadcasted by Flemish TV stations (52%). They are less convinced of the impact of digital innovations on the traditional way of consuming TV content. Only 16% think that Video On Demand services could replace traditional TV broadcasting (compared to 35% among Disruptors and 20% among Cumulators). And while 39% of Strugglers still think that virtual reality will be an important form of entertainment within the next 5 years, this figure is significantly lower compared to those of Disruptors (48%) and Cumulators (51%).

RESISTOR (26,3%)

To Resistors, things are simple: TV content should be watched on a TV set, at the moment the program is aired. 68% of Resistors watch TV content on a TV set on a daily basis, while only a small fraction use other screens to watch TV or other forms of video (7% on a smartphone, 6% on a laptop, and 5% on a tablet). Almost 3 in 4 watch linear TV broadcasting at least once a week (73%), while only 34% watch TV content with timeshifted viewing. Watching online video is still a rare activity for Resistors, as only 19% watch online videos at least once per week (compared to 84% of Disruptors, 74% of the Cumulators and 68% of the Strugglers). Resistors do not agree at all that Video On Demand services could replace traditional TV broadcasting (4%). They are also more skeptical about virtual reality, as only 20% agree that this could become an important form of entertainment within the next 5 years.

Devices to watch TV/video content (daily basis)

	TV set	Laptop	Smartphone	Tablet
Disruptor	45%	27%	36%	15%
Cumulator	76%	27%	36%	22%
Struggler	74%	26%	30%	31%
Resistor	68%	6%	7%	5%

Ways to watch TV content (weekly basis)

	Live/linear TV programming	Timeshifted viewing
Disruptor	31%	51%
Cumulator	89%	76%
Struggler	73%	67%
Resistor	73%	34%

Online video (weekly basis)

	Total online video	YouTube	Social media	News websites	App/website TV stations	Popcorn Time	Torrent sites	Netflix *(filtered on who has Netflix account)*
Disruptor	84%	75%	70%	52%	20%	6%	14%	77%
Cumulator	74%	64%	67%	73%	29%	3%	5%	72%
Struggler	68%	55%	54%	56%	30%	5%	5%	67%
Resistor	19%	12%	10%	19%	7%	1%	0%	72%

Live streaming (watching or sharing live video feeds during past year)

	Any platform	Periscope	Facebook Live	YouTube Live Now	Livestream	Broadcasted a live video yourself (any platform)
Disruptor	35%	5%	26%	16%	5%	7%
Cumulator	26%	3%	20%	10%	5%	5%
Struggler	23%	1%	18%	9%	4%	5%
Resistor	8%	1%	4%	5%	2%	1%

Online films/series

	Streaming (weekly basis)	Downloading (weekly basis)	Streaming (Only/mainly illegal)	Downloading (Only/mainly illegal)
Disruptor	35%	19%	25%	44%
Cumulator	22%	11%	21%	38%
Struggler	14%	14%	34%	30%
Resistor	4%	3%	7%	20%

Internet during TV (monthly basis)

	Total	Distraction (unrelated to TV program)	Interaction (related to TV program)
Disruptor	80%	58%	53%
Cumulator	80%	64%	56%
Struggler	74%	47%	52%
Resistor	45%	27%	28%

Statements (% (totally) agree)

	VR = important type of entertainment within 5 years	Satisfied with Flemish TV stations	Satisfied with Netflix *(filtered on who has Netflix account)*	Device doesn't matter to me for watching video	VoD-services (e.g. Netflix) are substitutes for traditional TV stations
Disruptor	48%	41%	57%	38%	35%
Cumulator	51%	53%	59%	34%	20%
Struggler	39%	52%	55%	34%	16%
Resistor	20%	47%	51%	14%	4%

CHAPTER 03

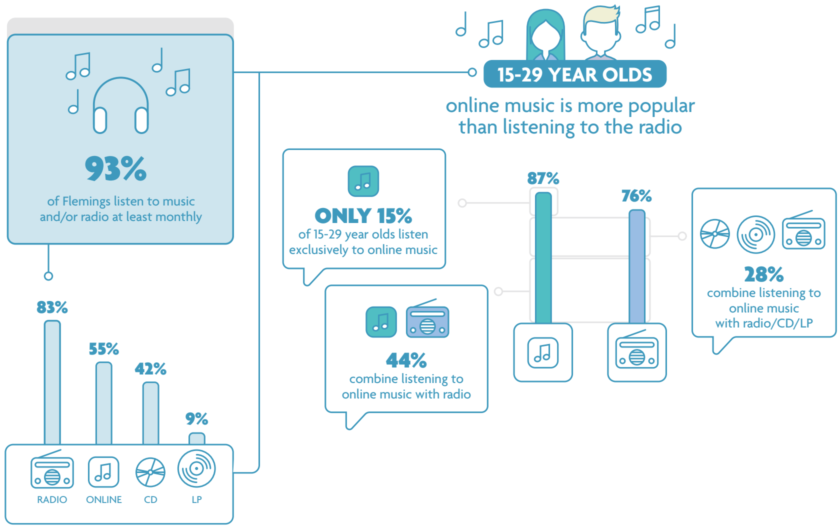
RADIO & MUSIC

DIGIMETER INFOGRAPHIC

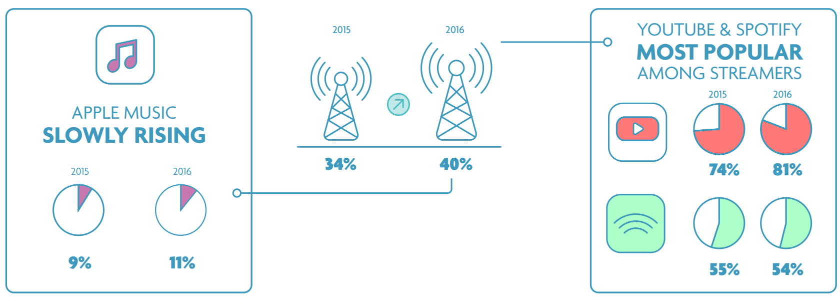
RADIO & MUSIC

Online music & streaming on the rise

Flemings and music:
A majority listens every month

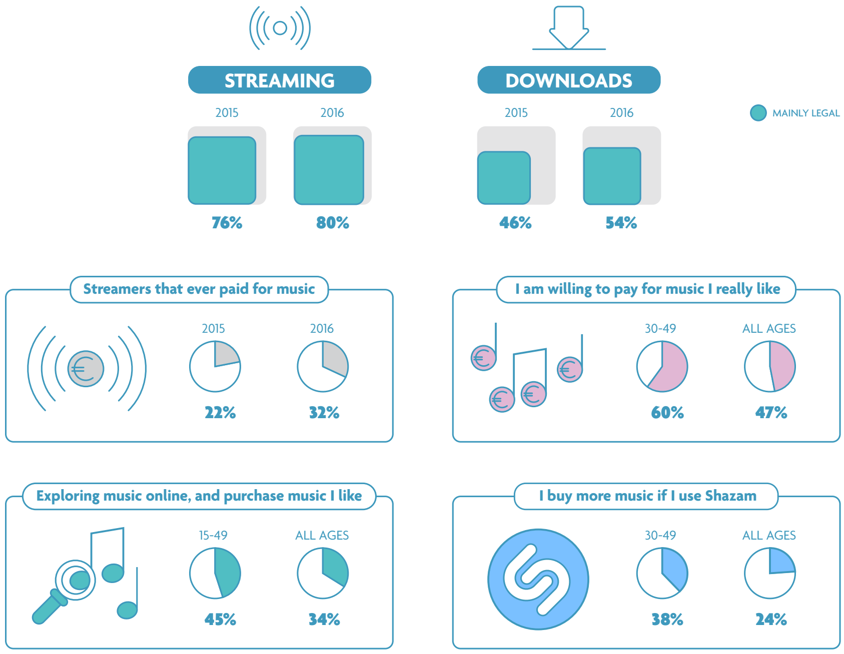


Streaming:
Streaming music on a monthly basis is on the rise

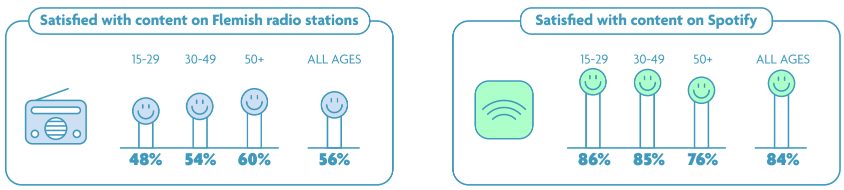


Downloads vs. streaming

Although Flemings report streaming and downloading music legally more frequently compared to last year, there is still a clear divide between the share of mainly legal streamers versus the share of mainly legal downloaders.



Satisfaction:
Overall, Flemish people are satisfied with radio & Spotify content



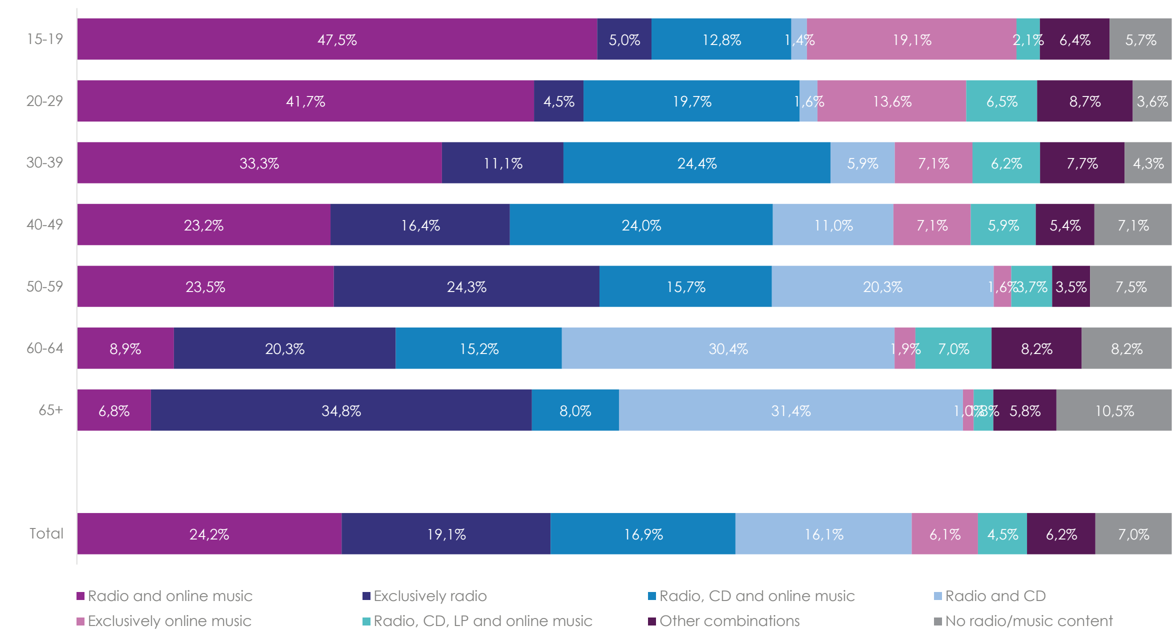
RADIO & MUSIC

RADIO & MUSIC CONSUMPTION

93% of the Flemings listen to music and/or radio on a monthly basis. The most common combination is listening to radio and online music (24,2%). Remarkably, 47,5% of the 15-19 year olds also consume this combination while 19,1% chose solely online music as their monthly source of audio content. This illustrates that, although listening to online music (84,1%) is more common on a monthly basis than listening to the radio (71,9%) among the youngest age group (see table 2 and graph 2, respectively), that doesn't mean that youngsters only listen to online music. In fact, as 19,1% of the 15-19 year old Flemings only listen to online music on a monthly basis, that means that 65,0% of the youngest age group combine online music with other sources on a monthly basis (19,1% + 65,0% = 84,1%). The most common combinations among that age group are online music and radio (47,5%) and radio, CD and online music (12,8%).

On a monthly basis, 19,1% of the Flemish population only listen to radio broadcasting. There is a clear relationship with age, as this is the case for only 5,0% of the 15-19 year old Flemings, compared to 34,8% among the oldest age segment (65+).

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



Radio graph 1: Radio & music consumption on a monthly basis (selected sources: radio, CD, LP and online music) - split by age group (N=2.164)

LISTENING TO RADIO BROADCASTING

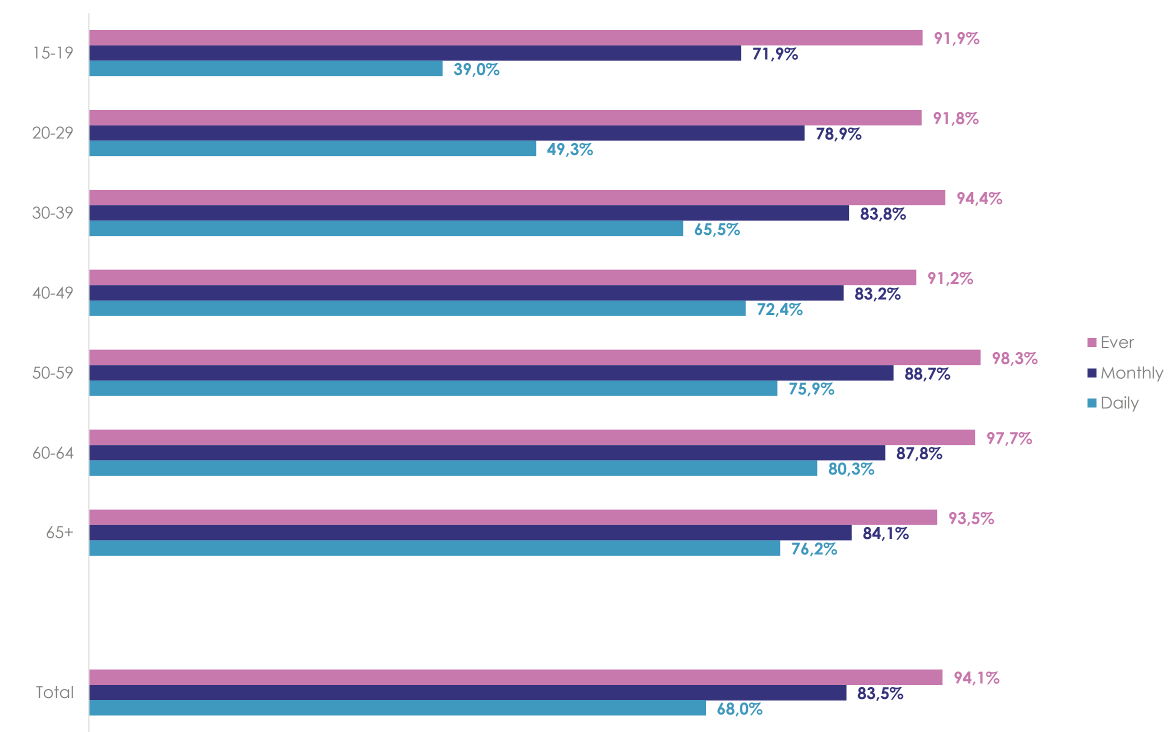
Radio broadcasting remains a central concept in the media consumption patterns of Flemings. 83,5% listen at least once a month to radio broadcasting, and 7 in 10 Flemings report listening to radio stations on a daily basis (68,0%). There is a clear relationship with age, as 39% of 15-19 year olds versus over 75% of Flemings aged 50 and older listen to the radio every day. That doesn't mean that the younger generation doesn't listen to the radio anymore, as 72% of the 15-19 year olds tune in at least once a month to radio stations.

Traditional radio sets at home (62,5%) and car radios (52,4%) remain the most common devices used to listen to the radio. The car radio is especially popular with people aged 20-59. That is not surprising, as this is the age range in which commuting between home and work occurs most frequently.

Over 1 in 5 Flemings listen to radio stations through (digital) TV (21,3%). A similar number use a computer to tune in to radio shows (19,4%). It comes as no surprise that 15-19 year olds in particular more often use a smartphone to listen to radio broadcasting (24,6%, compared to 13,9% of the total Flemish population). 5,9% of Flemings claim to use a DAB or DAB+ device to listen to the radio.

a

FREQUENCY LISTENING TO RADIO BROADCASTING - SPLIT BY AGE GROUP



Radio graph 2: 'How often do you listen to radio stations on any device?' - split by age group (N=2.164)

DEVICES USED TO LISTEN TO RADIO BROADCASTING (MONTHLY BASIS)

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Radio set (FM/AM receiver)	52,6%	52,3%	56,6%	59,6%	61,8%	78,5%	72,9%	62,5%
Car radio	43,8%	55,6%	58,0%	61,1%	62,4%	43,5%	38,5%	52,4%
(Digital) TV	12,6%	22,3%	21,0%	23,4%	24,0%	25,9%	18,4%	21,3%
Computer	25,2%	24,9%	21,1%	22,0%	19,6%	19,2%	11,4%	19,4%
Smartphone	24,6%	21,7%	19,1%	17,8%	13,5%	6,8%	2,7%	13,9%
Tablet	8,9%	6,4%	8,8%	10,1%	11,4%	2,8%	6,3%	8,1%
DAB or DAB+ set	3,4%	4,3%	5,5%	7,3%	10,7%	6,3%	3,2%	5,9%

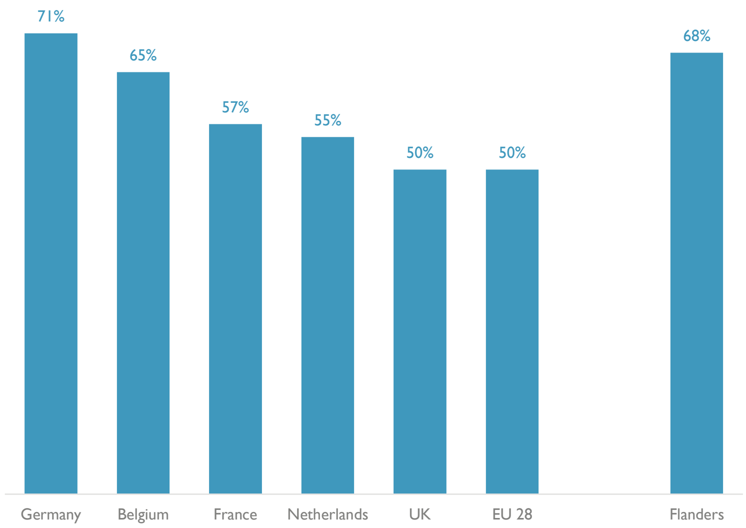
Radio table 1: 'Which of the following devices do you use at least once every month to listen to radio broadcasting?' - split by age group (N=2.164)

A WORD ON LISTENING TO THE RADIO

According to a study requested by the European Commission[15], radio is still a popular medium in Belgium. 65% of Belgians listen nearly every day to the radio. This is significantly higher than the average across the 28 member states of the European Union (50%). According to digimeter, the share of daily radio consumers is still slightly higher in Flanders (68%) than in Belgium as a whole (65%).

Compared to neighboring countries, the share of daily radio consumers is only higher in Germany (71%) compared to Belgium (65%). Listening to the radio is more of a daily habit in Belgium than it is in France (57%), the Netherlands (55%) and the UK (50%).

LISTENING TO RADIO BROADCASTING ON A DAILY BASIS



Framing graph 5: How often do you listen to the radio - share "(almost) every day"
Source Flanders: digimeter 2016
Source European countries: report 'Media Use in the European Union - Autumn 2015', commissioned by the European Commission

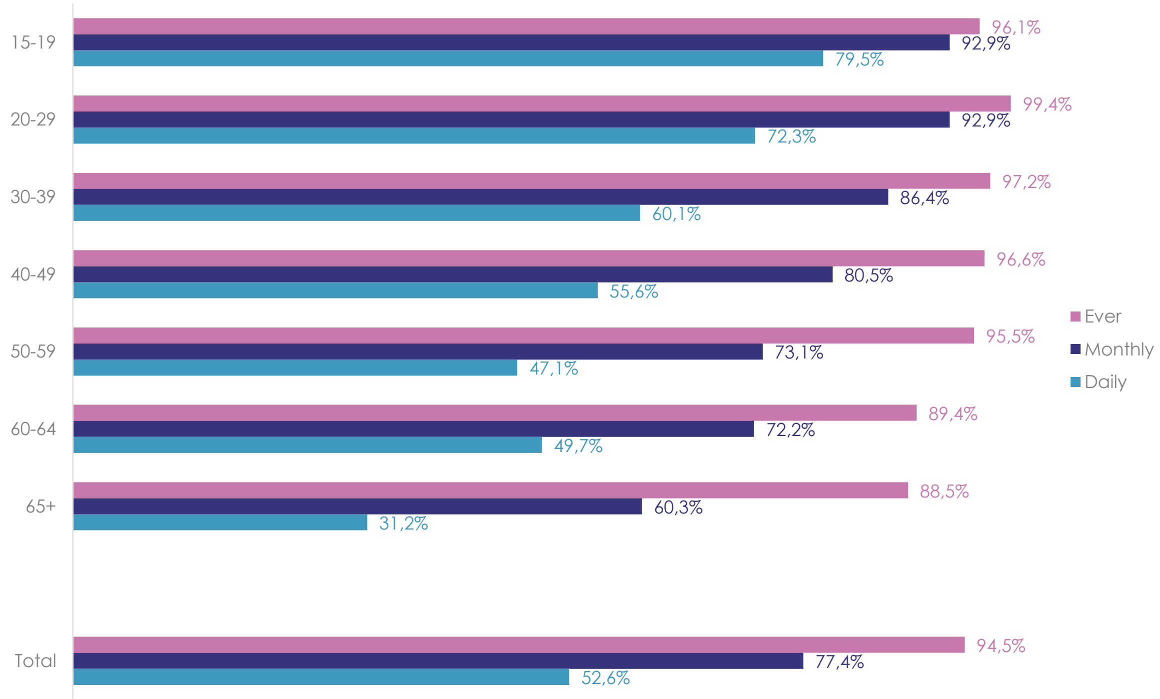
15 Report 'Media Use in the European Union', fieldwork Autumn 2015 (https://bookshop.europa.eu/en/media-use-in-the-european-union-pbNA0416326/;pgid=G-SPefJMEtXBSR0dT6jbGakZD0000vBNfuq_s;sid=ouMTZosSzCATZ9MKwmONwek374ANFMZxvJE=?CatalogCategoryID=iEKep2Ix3hEAAAEud3kBgSLq)

LISTENING TO MUSIC

FREQUENCY OF LISTENING TO MUSIC

Listening to music is especially popular among the younger age groups. 79,5% of 15-19 year olds listen to music on a daily basis, and among 20-29 year olds, this figure is 72,3%. Fewer than 1 in 3 of Flemings aged 65 years and older claim to listen to music (apart from radio broadcasting) on a daily basis. Overall, more than half of the Flemings listen to music on a daily basis (52,6%).

FREQUENCY LISTENING TO MUSIC - SPLIT BY AGE GROUP



Radio graph 3: 'How often do you listen to music (excluding listening to radio broadcasting)?' - split by age group (N=2.164)

SOURCES OF MUSIC

Despite the success of online streaming and the recurring news reports on dropping sales figures, the CD has not yet sunk into oblivion in Flanders. 42,0% of Flemings listen at least once a month to a CD, which is at the same level as online streaming (40,2%). However, we do see remarkable differences between age groups. Online streaming is clearly more in favor for the younger age segments (15-39 year olds). Among 40-49 year olds, there is an equally large share that listens to CDs (44,7%) as frequently as to online streaming services (45,6%) on a monthly basis. For the Flemings aged 50 years and older, the CD is clearly the preferred source of music.

That online music (both streaming and downloading music) is more popular within the younger age groups comes as no surprise. But what is remarkable is that for people aged 50 years and older, downloading seems to be at least equally as popular as streaming.

11,9% of Flemings claim to listen once a month to thematic channels via digital TV (e.g. jazz channel, rock channel, 70s channel, etc.). Especially among 30-49 year olds, there is a substantial share that makes use of those channels. The LP may have experienced a revival in the last couple of years, but less than 10% of Flemings claim to listen to long-playing records on a turntable (8,6%).

SOURCES TO LISTEN TO MUSIC - SPLIT BY AGE GROUP

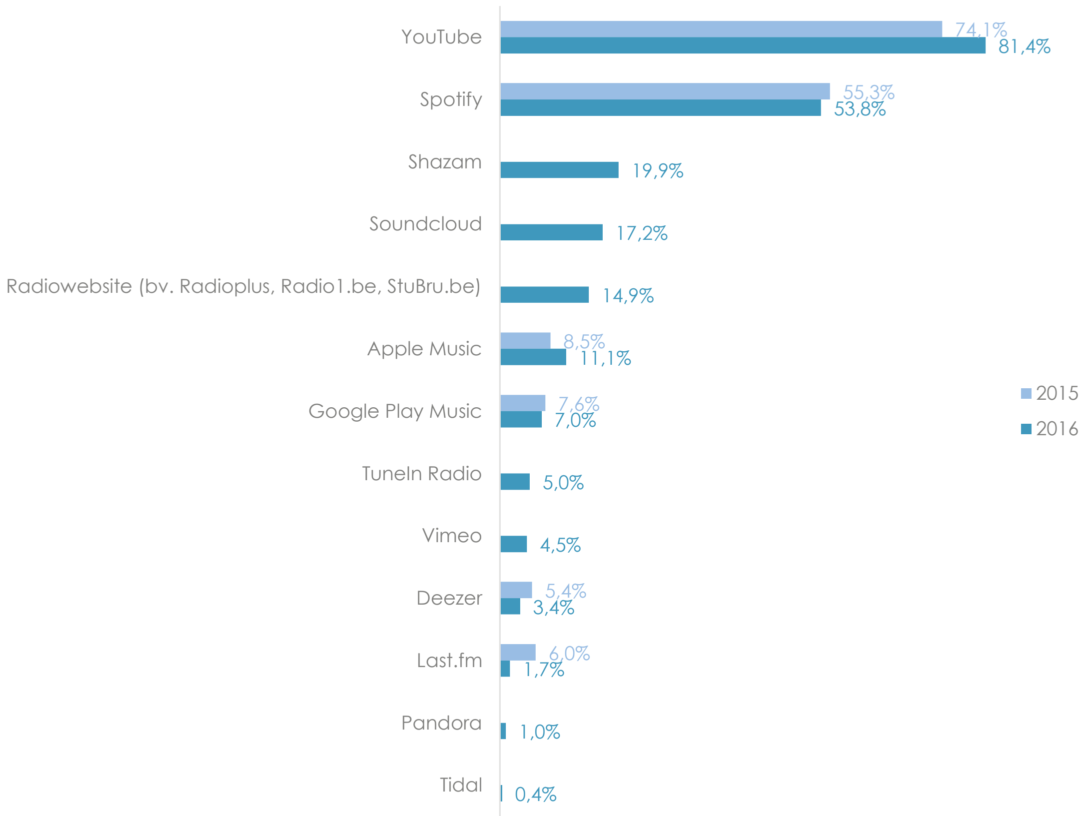
	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
CD	17,4%	32,5%	41,4%	44,7%	43,1%	58,8%	47,0%	42,0%
Online streaming	70,5%	76,4%	59,7%	45,6%	27,5%	19,5%	9,2%	40,2%
Downloads	52,2%	61,5%	56,1%	41,8%	31,0%	21,9%	10,9%	36,9%
Thematic channels digital TV	10,4%	12,7%	15,2%	20,9%	8,3%	8,9%	7,2%	11,9%
LP (vinyl)	8,3%	12,7%	10,6%	9,9%	5,9%	13,0%	4,4%	8,6%
Total online music (streaming + downloads)	84,1%	88,1%	77,5%	63,3%	46,5%	33,1%	17,4%	54,6%

Radio table 2: 'Which of the following sources do you use at least once every month to listen to music?' (excluding radio broadcasting) - split by age group (N=2.164)

STREAMING ONLINE MUSIC

YouTube remains the most popular platform for streaming online music. Over 8 in 10 Flemings who stream online on a monthly basis use YouTube as a music catalog (81,4%), an increase of 7,3 percentage points compared to last year. Spotify stands firmly in second place, with 53,8% of music streamers making use of this service. Apple Music has been able to attract new users, as the service grew from an 8,5% market share in Flanders in 2015 to 11,1% in 2016. Deezer is losing ground slightly, as only 3,4% of Flemish streamers are using this service, a drop of 2 percentage points compared to last year. Pandora is the leading streaming service in the US. Outside the US, Pandora is only available in Australia and New Zealand. Nevertheless, 1% of Flemish music streamers have found a workaround to be able to use this service (most likely by using a VPN connection). Tidal, the much-discussed streaming platform co-founded by Jay Z, seems to not be able to attract Flemish streamers (0,4%).

SOURCES USED TO STREAM MUSIC (OF PEOPLE STREAMING ONLINE ON MONTHLY BASIS)



Radio graph 4: 'What online sources do you use at least once a month to stream music?' (of those streaming music on monthly basis, N=870)

A WORD ON SPOTIFY

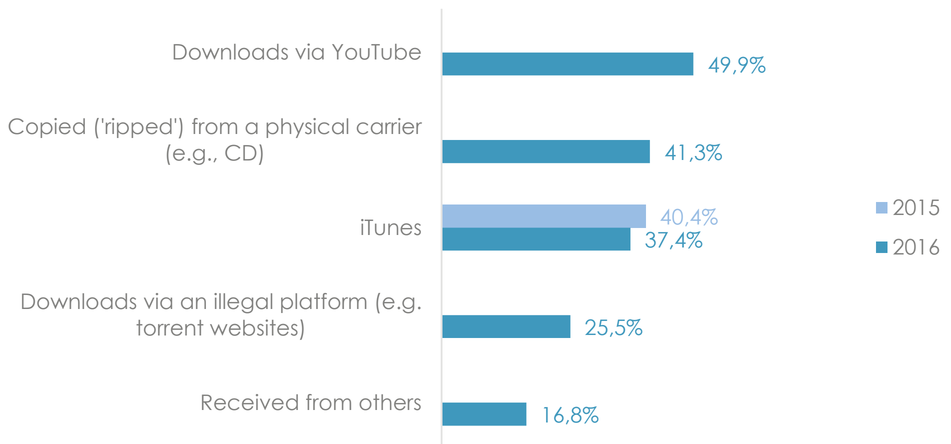
40,2% of Flemings state streaming music online on a monthly basis. Over half of them use Spotify to stream their online music (53,8%). Extrapolating this figure out to the total Flemish population (15+), regardless of experienced with streaming or not, this is 21,6%, which represents a small decline compared to 2015 (24,9%). This decline could be due to a change in the questionnaire. This year, we first included a question about which music sources the respondents have used during the past month (CD, LP, thematic music channels on digital TV, online streaming or downloads), and only asked which streaming platforms were used by those who indicated that they had streamed music online during the past month. Last year, we asked every respondent which platform they use to listen to online music regardless of frequency.

The rate of Spotify adoption in Flanders is still less than that of the Netherlands. According to Telecompaper, 35% of the Duth population has used Spotify in the last 6 months of 2015[16].

DOWNLOADING/SAVING DIGITAL MUSIC FILES

Remarkably, YouTube is not only the most popular platform for streaming music, but also for downloading it. Half of the respondents who claim to listen to downloads or saved music files on a monthly basis state that YouTube was a source for at least some of those files (49,9%). Copying music files (e.g. MP3s) from physical carriers such as CDs and DVDs (also known as 'ripping') is also a popular source for digital music files, as 41,3% of Flemings who listen to downloads or saved music at least once a month report listening to ripped music files. iTunes seems to experience competition from other (streaming) platforms, including Apple Music. The market share of iTunes among Flemings who listen to stored digital music files has decreased from 40,4% in 2015 to 37,4% in 2016.

SOURCES OF DOWNLOADED/SAVED DIGITAL MUSIC FILES



Radio graph 5: 'What sources do you use at least once a month to obtain digital music files?' (e.g. MP3) (of those downloading/saving music on monthly basis, N=800)

16 Source: Telecompaper (https://www.telecompaper.com/nieuws/800000-nederlanders-probeerden-apple-music--1120779)

PAYING FOR ONLINE STREAMING MUSIC

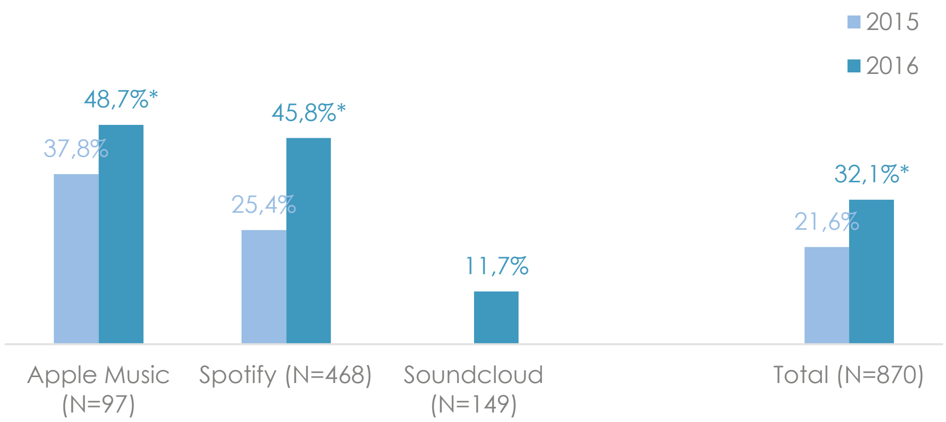
In a previous paragraph, we introduced the fact that that 40,2% of Flemings listen at least once a month to online music via streaming platforms. Within that group of online music consumers, 1 in 3 report to have ever paid for music (32,1%), which is significantly more than the previous year (21,6%). So, it seems that paying for online streaming music is gaining momentum. This is also the conclusion of Belgian Entertainment Association (BEA). In the first half of 2016, paid music streaming accounts generated a revenue of €17,9 million in Belgium, which is almost twice as much as in the first half of 2015 (€9,8 million)[17].

Apple Music offers 3 free trial months, after which people have to pay €9,99 per month for a regular account, or €14,99 for a family account (maximum 6 people). Almost half of Apple Music users state paying for the service (48,7%), which means that half of the users are still in their free trial periods (51,3%).

Spotify has both a free service (financed by advertisements) and a premium service (at the same pricing as Apple music: €9,99 for a single account, and €14,99 for a family account). 45,8% of Spotify users claim to have paid for the service at some point (either in the past or currently). In 2015, only 25,4% of Spotify users had a premium account. However, one important remark: Spotify users can switch between the paid and free service (for instance, taking a premium account for the periods where you want to stream offline (a feature only available with premium accounts), and use a free account at other times). So the 45,8% does not reflect the number of Spotify users paying now for the service, but simply that they have paid at one point in time. To put it into perspective: according to research by Telecompaper, 41% of the Spotify users in the Netherlands had a premium account in Q4 2015.

Soundcloud managed to convince 11,7% of its users to pay for the service. The other online platforms either don't have a paid streaming/downloading service available in Flanders (e.g. YouTube), or have a sample size that is too small to allow us to make assumptions (e.g. Deezer).

PAYING FOR STREAMING ONLINE MUSIC



Radio graph 6: 'On which of the following streaming platforms have you ever paid for music?' (of Flemings using the particular platform on monthly basis)
* Statistically significant change compared to the previous year, based on a chi-square test.

17 Source: Belgian Entertainment Association (http://www.belgianentertainment.be/nl/betalende-muziekstreaming-in-opmars/)

LEGAL VS. ILLEGAL MUSIC STREAMING/DOWNLOADING

Just as with downloading movies and series, we remark a shift towards more (perceived) legal downloading compared to illegal music downloads. In 2015, 35,1% of music downloaders state that they mainly or even only download illegally. This figure has dropped to 26,6% in 2016, which is a significant change. However, we stress that this only reflects the perceptions of the respondents.

For streaming music, we do see the same trend towards more legal forms, but here the differences are not significant (i.e. the differences could be due to chance or to differences in the sample composition).

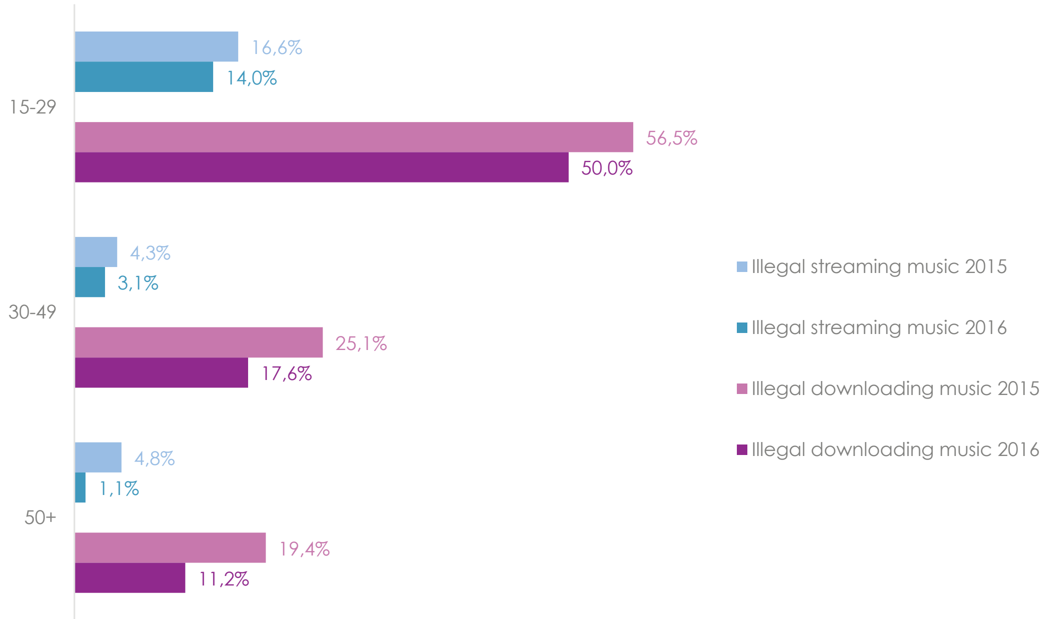
The use of illegal forms of downloading or streaming is most popular within the youngest segment. Half of the music downloaders aged 15-29 years old do so in a mainly illegal way (50,0%); for streaming music, this is 14,0% within music streamers of the same age segment.

LEGAL VS. ILLEGAL STREAMING/DOWNLOADING OF MUSIC

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

Radio table 3: 'To what extent do you download and/or stream music in a legal or an illegal way?' (of people ever streaming (N=870) or downloading (N=800) music).
* Statistically significant change compared to the previous year, based on a chi-square test.

ILLEGAL STREAMING/DOWNLOADING OF MUSIC - SPLIT BY AGE GROUP



Radio graph 7: Proportion only/mainly illegal streaming or downloading music (of people ever streaming (N=870) or downloading (N=800) music - split by age group

OPINION ON RADIO & MUSIC CONSUMPTION

1 in 5 Flemings claim to listen less frequently to radio broadcasting compared to last year (20,8%). It seems that the youngest age segment in particular agrees with that statement (29,8%).

Despite that substantial number of Flemings reporting to listen less frequently to the radio, a clear majority of Flemings is satisfied with the content on Flemish music stations (55,7%). In addition, Flemings using Spotify are also positive about the music offered in the Spotify catalog (83,9%). This indicates that, just as with traditional TV and on-demand video, streaming platforms like Spotify act as an extra element to the consumption of audio content, and not as a substitute for traditional radio broadcasting.

Almost half of the respondents claim to be willing to pay for music they really like (46,6%). Less than 3 in 10 Flemings disagrees with this item, and are thus not willing at all to pay for music (27,8%). Despite prejudices on this subject, it is not the youngest age segment that shows the least willingness to pay. In fact, it is the oldest age segment (50 years and older) that reports the lowest willingness to pay (35,8%), compared to 15-29 year olds (50,4%) and 30-49 year olds (60,5%). Over 4 in 10 of the 15-49 year olds use free channels to explore (new) music, and buy a selection of the best music they have encountered that way.

Streaming music may not serve as a substitute for radio broadcasting, but for 58,6% of music streamers, it acts as a replacement for purchasing music by the unit (e.g. paid downloads or buying CDs). Streamers aged younger than 50 particularly agree with this subject.

A quarter of Shazam users claim that they buy more music because of this service (24,0%). In particular, Shazam users aged 30-49 years old claim to have experienced this effect of Shazam (38,3%).

OPINION ON RADIO AND MUSIC CONSUMPTION

	(Totally) disagree	Neutral	(Totally) agree
I listen less frequently to radio stations compared to last year	58,5%	20,6%	20,8%
I am satisfied with the content on Flemish radio stations	14,7%	29,6%	55,7%
I am satisfied with the content on Spotify *(On people using Spotify, N=468)*	1,8%	14,3%	83,9%
I am willing to pay for music I really like	27,8%	25,7%	46,6%
I explore music via free online channels, and I purchase the albums or singles I'm impressed by	30,6%	35,1%	34,3%
Since I am streaming music online, I buy less music by the unit (e.g. via downloads on iTunes or via CDs) *(on people streaming music, N=870)*	16,4%	25,0%	58,6%
Using Shazam encourages me to buy more music (e.g. via iTunes) *(on people using Shazam, N=174)*	44,4%	31,5%	24,0%

Radio table 4: 'To what extent do you agree with the following statements?' (on a 5-point scale) (N=2.164, except where indicated otherwise)

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

	15-29	30-49	50+	Total
I listen less frequently to radio stations compared to last year	29,8%	20,5%	17,2%	20,8%
I am satisfied with the content on Flemish radio stations	48,0%	54,2%	60,0%	55,7%
I am satisfied with the content on Spotify *(On people using Spotify, N=468)*	86,5%	85,2%	75,5%	83,9%
I am willing to pay for music I really like	50,4%	60,5%	35,8%	46,6%
I explore music via free online channels, and I purchase the albums or singles I'm impressed by	45,3%	44,3%	22,9%	34,3%
Since I am streaming music online, I buy less music by the unit (e.g. via downloads on iTunes or via CDs) *(on people streaming music, N=870)*	61,7%	61,1%	48,3%	58,6%
Using Shazam encourages me to buy more music (e.g. via iTunes) *(on people using Shazam, N=174)*	15,2%	38,3%	19,0%	24,0%

Radio table 5: Share (totally) agree with the statements (on a 5-point scale) - split pby age group (N=2.164, except where indicated otherwise)

RADIO & MUSIC: DIGIMETER PROFILES

DISRUPTOR (24,1%)

Disruptors are big music fans (86% listen to music on a weekly basis), but that does not mean that they regularly listen to radio broadcasting (58,5% listen to the radio on a weekly basis). 1 in 3 agree that they listen less frequently to the radio compared to the previous year. Moreover, only 40% are satisfied with the programming on Flemish radio stations. They tend to listen more to music streamed online (62%) and downloaded music files (53%) than any other profile. CDs, on the other hand, are a less-preferred music source to them (28%). Streaming happens mainly via YouTube (88%). This segment comprises the largest user base of Soundcloud (24%). However, Disruptors are not averse to paying for music streaming services. In fact, they show the second-highest proportion of people who have ever paid for music streaming (47%), only slightly preceded by Cumulators (49%). Moreover, 56% of Disruptors agree that they are willing to pay for music they really like. However, since the emergence of music streaming, they are more selective in the music they pay for. 62% agree that they buy fewer individual units of music (singles, albums, records, downloads) due to the fact that they use streaming platforms.

CUMULATOR (38,6%)

Just as with other types of media content, Cumulators tend to rely on both traditional and digital sources to listen to radio broadcasting and music. Almost all Cumulators listen at least once per week to radio broadcasting (96%). This happens mainly through the use of more traditional devices such as a radio set (FM/AM receiver) at home (73%) or a car radio (73%). But this segment also shows the highest use of internet radio on a weekly basis, with 32% listening via computer, 24% via smartphone and 14% via the tablet. Overall, they are satisfied with the content broadcasted by Flemish radio stations (63%).

80% of Cumulators listen at least once per week to music (in addition to radio broadcasting). They use a mix of CDs (47%), downloads (50%) and online streaming (53%) to consume music. Just as with Disruptors, they are willing to pay for music they really like (57%). 49% of Cumulators have paid for online music streaming services.

STRUGGLER (10,9%)

Despite the fact that Strugglers seem to be discovering alternative forms of watching TV and video content (see earlier), they are still predominantly traditional in the way they consume radio content. Almost every Struggler listens to the radio at least once every week (94%). This is mainly done using traditional devices such as a radio set (FM/AM receiver) at home (78%) and a car radio (58%). But they are also exploring the use of other devices to listen to their favorite radio stations. 29% of Strugglers use a computer to listen to the radio at least once per month (comparable to the 32% of Cumulators and significantly higher than the 12% among Disruptors). Remarkably, they show the highest rate of listening to radio stations through (digital) TV (37%). Typical for this segment is that the use of tablets for listening to radio broadcasting is relatively high (13%, together with Cumulators (14%), the highest use rates of all segments). Overall, Strugglers are more satisfied with Flemish radio stations than any other segment (66%).

Strugglers are still predominantly traditional in the way they consume music. They listen to CDs (57%) and LPs (12%) more frequently than any other segment. And while they listen as frequently as Cumulators to thematic music channels through digital television (17%), they are significantly less frequently experiencing music through online platforms (downloads: 33%; streaming: 27%). Moreover, this is the only segment in which downloading music is still more prevalent than streaming music. In total, only 44% of Strugglers listen to online music at least once per month (compared to 79% of Disruptors and 71% of Cumulators). As they are less familiar with online music (and especially with streaming music), they also show the lowest willingness to pay for online music streaming services (19,7%, compared to 47% among Disruptors, 49% among Cumulators, and even 34% among Resistors). In general, they agree less than Disruptors and Cumulators that they are willing to pay for music they really like (43%, compared to 56% among Disruptors and 57% among Cumulators).

RESISTOR (26,3%)

Resistors stick by the traditional method of listening to radio stations. 74% listen to the radio at least once per week, mainly through a traditional radio set at home (64%) or a car radio (29%). Other devices are seldom used as means to listen to radio broadcasting.

Apart from listening to the radio, Resistors listen less frequently to music compared to other segments (46% listen at least once per week to music, compared to 86% among Disruptors, 80% among Cumulators and 78% among Strugglers). When they do listen to music, this is most commonly by playing a CD (41%). They are less familiar with online music platforms, as only 13% have listened to music via online music streaming or downloaded music files at least once per month. As they mainly consume music through radio broadcasting, their willingness to pay for music they really like is relatively low (25%, compared to 56% among Disruptors, 57% among Cumulators and 43% among Strugglers).

Listening to radio broadcasting/music (weekly basis)

	Radio stations	Music (apart from radio boadcasting)
Disruptor	59%	86%
Cumulator	96%	80%
Struggler	94%	78%
Resistor	74%	46%

Devices for listening to radio (monthly basis)

	Radio set (FM/AM receiver)	Computer	Smartphone	Tablet	Car radio	DAB/DAB+ set	TV set (e.g. radio channels on digital TV)
Disruptor	38%	12%	14%	4%	43%	3%	12%
Cumulator	73%	32%	24%	14%	73%	9%	31%
Struggler	78%	29%	10%	13%	58%	9%	37%
Resistor	64%	4%	1%	2%	29%	2%	10%

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

	CD	LP	Downloads	Thematic channels on digital TV (e.g. Jazz channel, 70's channel)	Online streaming	Total online music (streaming + downloading)
Disruptor	28%	9%	53%	10%	62%	79%
Cumulator	47%	10%	50%	18%	53%	71%
Struggler	57%	12%	33%	17%	27%	44%
Resistor	41%	5%	5%	3%	8%	13%

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

	YouTube	Spotify	Apple Music	Soundcloud	Shazam
Disruptor	88%	53%	11%	24%	23%
Cumulator	78%	57%	13%	14%	20%
Struggler	88%	41%	6%	16%	15%
Resistor	58%	39%	7%	0%	0%

Platforms used to download/save music content from *(within those who download/save music)* **on a monthly basis**

	iTunes	Downloads via YouTube	Downloads via an illegal platform (e.g. torrent sites)	Ripped (e.g. from a CD)	Received from others
Disruptor	33%	60%	35%	37%	17%
Cumulator	42%	43%	22%	45%	18%
Struggler	29%	62%	21%	43%	12%
Resistor	39%	23%	4%	27%	17%

Music streaming and downloading *(within those who stream/download music)*

	Ever paid for music streaming	Streaming (Only/mainly illegal)	Downloading (Only/mainly illegal)
Disruptor	47%	9%	39%
Cumulator	49%	6%	21%
Struggler	20%	11%	21%
Resistor	34%	0%	5%

Statements (% (totally) agree)

	I listen less frequently to radio stations compared to last year	I am willing to pay for music I really like	I explore music via free online channels, and I purchase the albums or singles I'm impressed by	I am satisfied with the content on Flemish radio stations	I am satisfied with the content on Spotify *(filtered on who have a Spotify account)*	Since I am streaming music online, I buy less music by the unit (e.g. CDs) *(filtered on people streaming music)*
Disruptor	33%	56%	39%	40%	85%	62%
Cumulator	14%	57%	44%	63%	86%	60%
Struggler	20%	43%	35%	66%	77%	49%
Resistor	20%	25%	16%	56%	54%	41%

CHAPTER 04

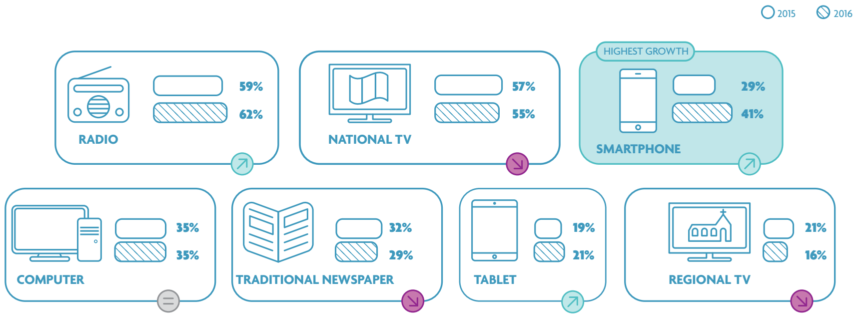
NEWS CONSUMPTION

DIGIMETER INFOGRAPHIC

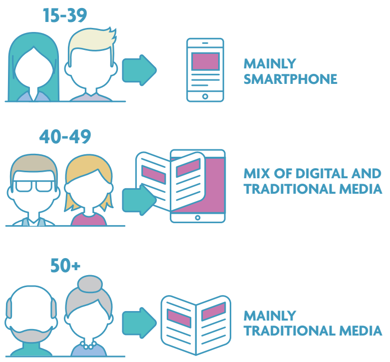
NEWS CONSUMPTION

An evolution towards smartphones?

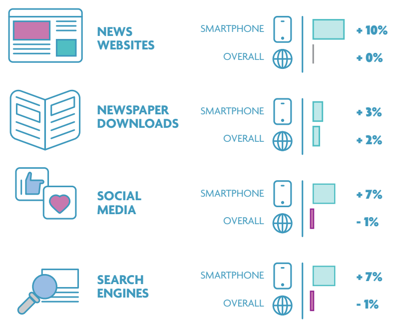
Daily news consumption:
Strong smartphone growth, other sources stable



Daily news consumption:
DEVICE USAGE BY AGE

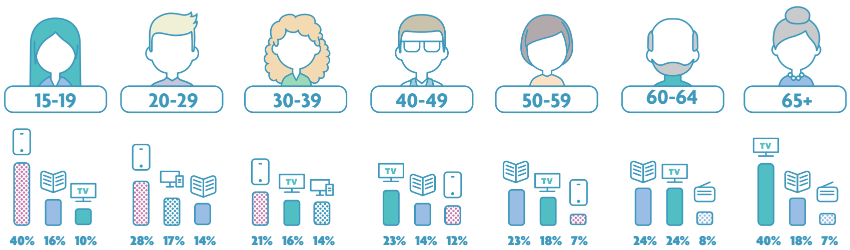


Digital news sources:
OVERALL STAGNATION, BUT SMARTPHONE CONTINUES THE RISE



Preferred news source:

SMARTPHONE MOST POPULAR AMONG 15-29 YEAR OLD FLEMINGS, TV STATIONS GAIN FANDOM WITH INCREASING AGE



Youngsters and news:

YOUNG FLEMINGS ARE LESS CONVINCED THAT FOLLOWING THE NEWS IS IMPORTANT AND PREFER PERSONALIZED NEWS

NEWS CONSUMPTION

SOURCES FOR FOLLOWING THE NEWS

SOURCES/DEVICES FOR FOLLOWING THE NEWS

The sources and devices used to monitor the news have not changed drastically. Radio (61,6%) and national TV stations (54,5%) are still the most popular sources on a daily basis, attracting over half of the Flemish population every day. Over 4 in 10 Flemings use a smartphone to monitor the news on a daily basis (41,1%), which is a significant increase compared to 2015 (+11,8 percentage points). As such, the smartphone is now to more Flemings a daily gateway to news than the computer (status quo compared to last year at 35,2%). Reading newspapers on a daily basis remains stable at about 3 in 10 Flemings (29.2%).

The smartphone has become the major news source for Flemings younger than 40 years old. For 2 in 3 of 40-49 year old Flemings, the radio is a daily news source. National TV stations (52,9%) and the smartphone (52,5%) share second place. News programming on radio and national TV stations reaches over 7 in 10 of Flemings aged 60 years and older on a daily basis. The printed newspaper is, for about 45% of Flemings aged 60 years and older, a daily source of news updates. Overall, 89,5% of the Flemings use at least one of the enlisted news sources on a daily basis. This is lowest among 15-19 year old Flemings, where only 65,0% follow the news on a daily basis. This can be linked to the fact that the youngest age group also attach the least importance to (actively) following the news (see table 6).

3 in 4 Flemings use a traditional news source (radio, TV, printed press) on a daily basis (77,9%). While this may be only a small decline compared to 2015 (79,8%), it is remarkable that the share of Flemings that use traditional news media as single news source has decreased significantly (from 33,3% in 2015 to 27,7% in 2016). This is the most pronounced among the 30-49 year old Flemings, where the share of Flemings that only consume traditional news sources on a daily basis has dropped from 23,1% in 2015 to 14,6% in 2016.

The use of online news sources on a daily basis has risen slightly from 35,2% in 2015 to 37,1% in 2016. The largest increase is found among the Flemings aged 50+ (from 30,0% to 33,5%). However, only a small percentage exclusively use online news sources on a daily basis (1,5%, coming from 2,5% in 2015). Most people who use online news sources on a daily basis, also use a mix of traditional and mobile news sources on a daily basis (20,9%, coming from 17,8% in 2015).

The use of mobile news sources has increased the most (from 43,2% in 2015 to 50,2% in 2016). All age groups experience an increased use of mobile news sources. The largest share of people using mobile news sources as the single gateway to news on a daily basis is found among 15-29 year old Flemings (11,9%, coming from 9,1% in 2016).

SOURCES/DEVICES FOR FOLLOWING THE NEWS

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

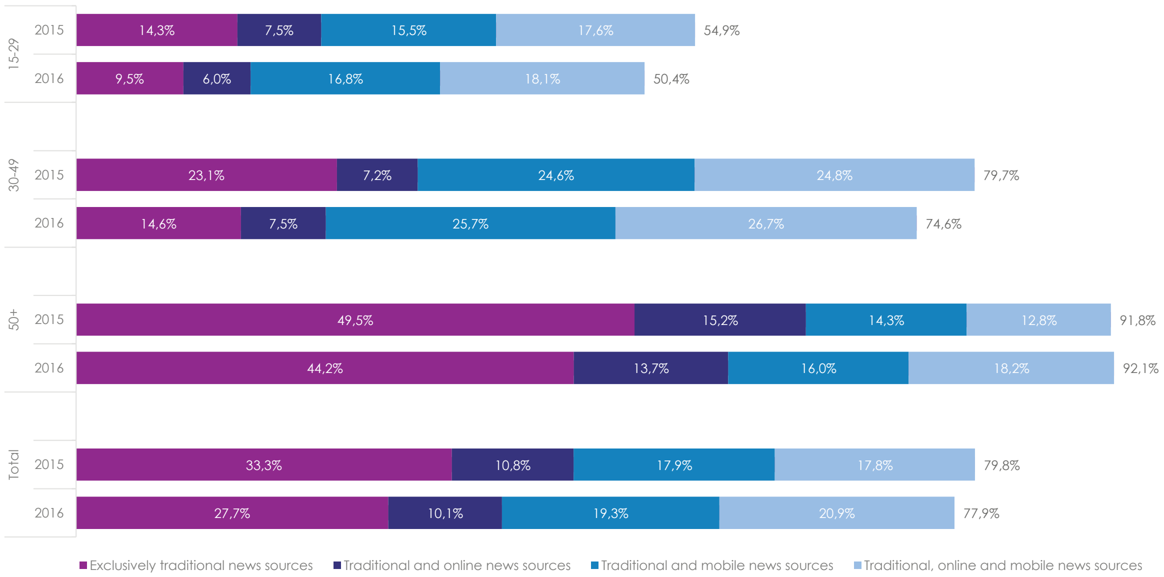
News table 1: 'How frequently do you use the following sources/devices to follow the news?' (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

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

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Radio	32,1%	39,5%	59,9%	66,4%	65,3%	78,5%	73,2%	61,6%
National TV stations	19,2%	27,8%	35,4%	52,9%	60,9%	74,2%	83,4%	54,5%
Smartphone	49,7%	60,1%	62,0%	52,5%	39,0%	22,3%	13,0%	41,1%
Computer	21,5%	42,5%	43,5%	36,3%	36,6%	32,9%	28,2%	35,2%
Printed newspaper	13,6%	11,0%	13,4%	25,1%	39,0%	44,4%	45,7%	29,2%
Tablet	6,4%	13,9%	20,2%	28,3%	29,5%	29,1%	16,8%	21,2%
Regional TV stations	1,0%	3,6%	6,9%	13,6%	13,0%	20,5%	37,3%	16,2%
App on smart TV	7,2%	6,1%	4,9%	5,6%	3,8%	0,4%	3,0%	4,4%
Printed magazine	0,7%	1,0%	1,9%	1,7%	5,7%	10,7%	5,9%	3,9%
Smartwatch	0,4%	0,7%	0,4%	0,0%	0,2%	0,0%	0,0%	0,2%
Any news source	65,0%	82,2%	88,3%	89,2%	93,1%	98,7%	96,4%	89,5%

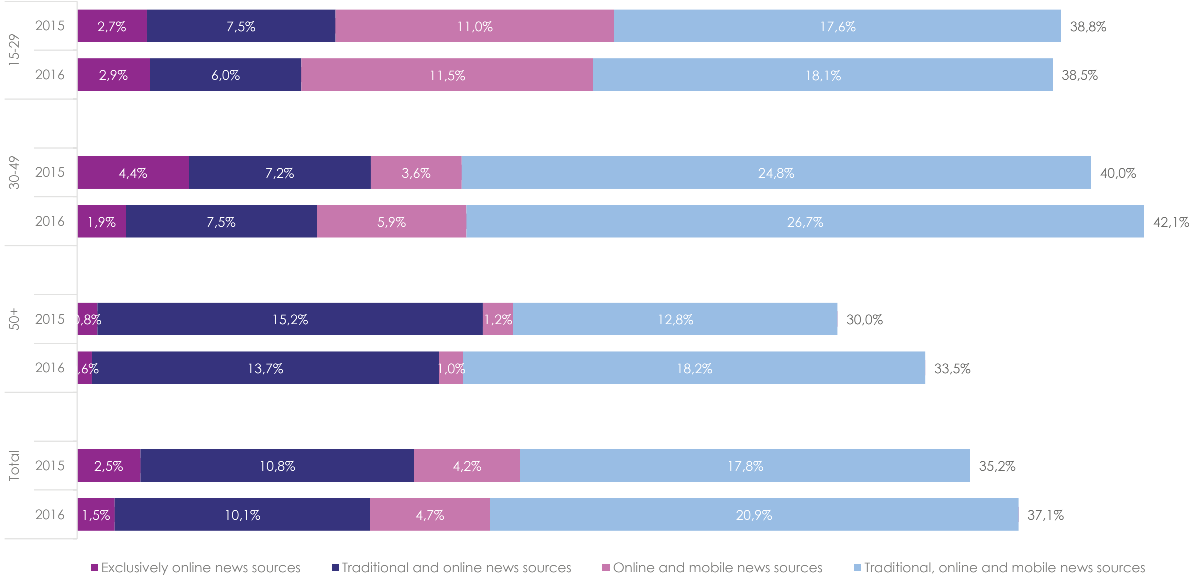
News table 2: 'How frequently do you use the following sources/devices to follow the news?' (% on daily basis) - split by age group (N=2.164)

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



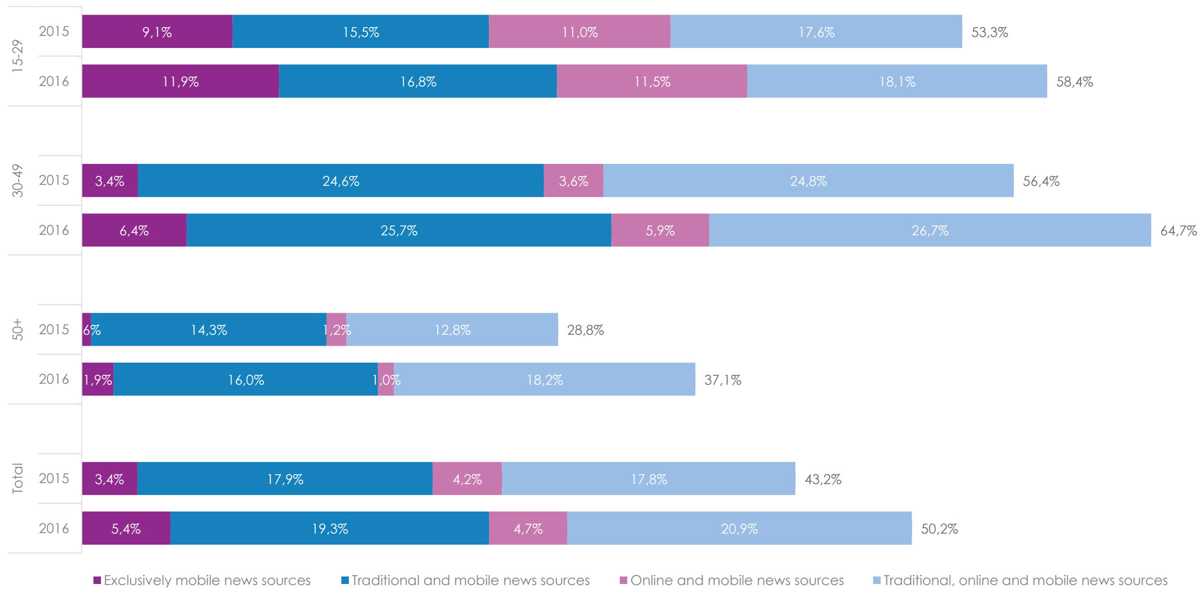
News graph 1: Consumption of traditional news sources on a daily basis - split by traditional news sources as single news source vs. in combination with online/ mobile news sources (traditional news sources: printed newspaper and newsmagazine, TV broadcasting, radio broadcasting; online news sources: computer and app on smart TV; mobile news consumption: smartphone and tablet) - Split by age group (N=2.164)

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



News graph 2: Consumption of online news sources on a daily basis - split by online news sources as single news source vs. in combination with traditional/mobile news sources (traditional news sources: printed newspaper and newsmagazine, TV broadcasting, radio broadcasting; online news sources: computer and app on smart TV; mobile news consumption: smartphone and tablet) - Split by age group (N=2.164)

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



News graph 3: Consumption of mobile news sources on a daily basis - split by mobile news sources as single news source vs. in combination with traditional/online news sources (traditional news sources: printed newspaper and newsmagazine, TV broadcasting, radio broadcasting; online news sources: computer and app on smart TV; mobile news consumption: smartphone and tablet) - Split by age group (N=2.164)

DIGITAL NEWS SOURCES

We mentioned earlier that the smartphone is gaining importance as a gateway to news. This is indeed reflected in the way Flemings consume digitally-sourced news. Even though the use of digital sources (visiting news websites, reading a downloadable, digital version of a newspaper, reading news articles posted on social media, using a search engine or an app with a personalized selection of the news) has not changed significantly compared to the previous year, we do see that more and more Flemings tend to access these sources via smartphone.

Almost 7 in 10 Flemings visit a news website at least once per month (68,6%). This is just as much as in 2015 (68,9%). Using the tablet to access news websites remains stable, with a quarter of the Flemish population (24,5%, compared with 24,7% in 2015) doing so. The use of smartphones to visit news websites has increased significantly by 10,8 percentage points to 44,3%, while the use of computers has dropped significantly by 7,1 percentage points to 43,8%. In other words, while in 2015 there was still a clear preference for Flemings to visit news websites using a computer, there are now as many Flemings visiting news sites via smartphone as via computer.

3 in 10 Flemings read a digital, downloadable version of a newspaper (30,7%), which is at the same level as the previous year (28,9%). The use of a computer (12,6%) or a tablet (14,6%) has remained stable, while reading a downloadable version of a newspaper on a smartphone attracts an increasing number of Flemings (10,7%, up by 3,1 percentage points compared to 2015).

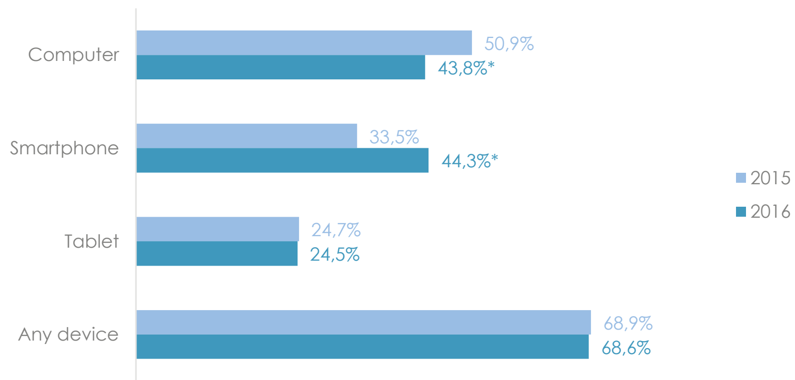
Over half of Flemings state that they consider social media a news source (53,6%). Although this figure as such has not changed significantly compared to 2015 (-1,4 percentage points), we do notice a remarkable shift in devices used to consume news via social media. Just like with visiting news websites, the use of tablets has remained stable (18,4%, -0,1 percentage points), while the use of smartphones has increased significantly (40,4%, +7,1 percentage points) and the use of computers has decreased (33,0%, -4,1 percentage points). In other words, while there were still more Flemings using a computer to monitor the news via social media in 2015, there is now a clear preference to use the smartphone to access this news source.

Search engines (e.g. Google, Bing) remain important sources to search for news on a specific subject. 6 in 10 Flemings search for news via search engines on a monthly basis (58,6%). Most commonly, this is done on a computer (44,3%, a non-significant decrease of 2,3 percentage points compared to 2015). The smartphone is closing in on the computer (34,5%, a significant increase of 6,9 percentage points compared to 2015), while the use of a tablet remains stable at 22,0% (a non-significant increase of 1,5 percentage points).

Personalized news apps still seem to have trouble reaching a substantial amount of users in Flanders. 7,1% of the Flemish population reports to have used an app with a personalized selection of news (e.g. Flipboard).

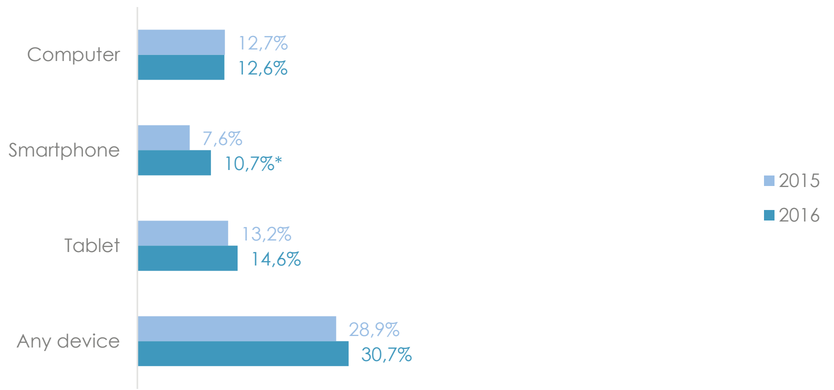
For 15-29 year old Flemings, social media are as an important source of news as news websites. The use of a digital, downloadable version of the newspaper seems to be mainly popular among 30-49 year olds. Flemings aged 15-19 years old show the highest adoption of personalized news apps.

DIGITAL NEWS SOURCES USED IN THE LAST MONTH – NEWS WEBSITES



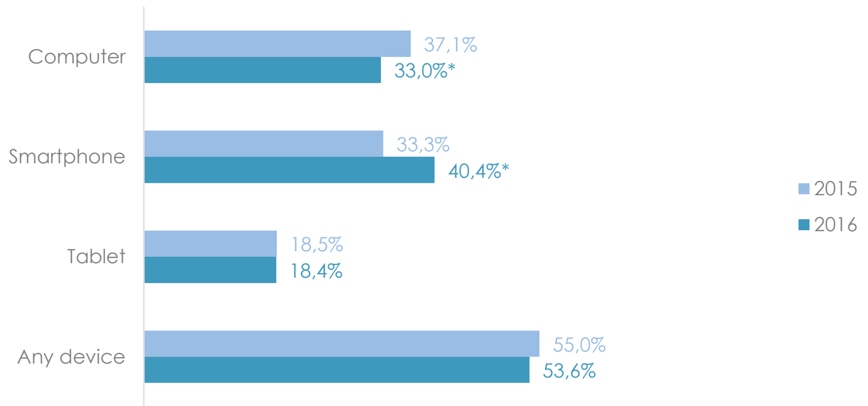
News graph 4: 'Which devices did you use to follow digital news sources during the past month?' - news websites (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

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



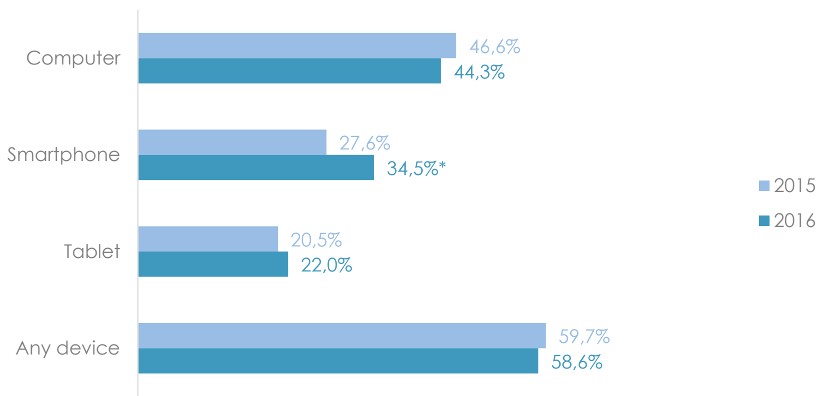
News graph 5: 'Which devices did you use to follow digital news sources during the past month?' - downloadable digital newspaper, e.g. PDF-version (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

DIGITAL NEWS SOURCES USED IN THE LAST MONTH – SOCIAL MEDIA



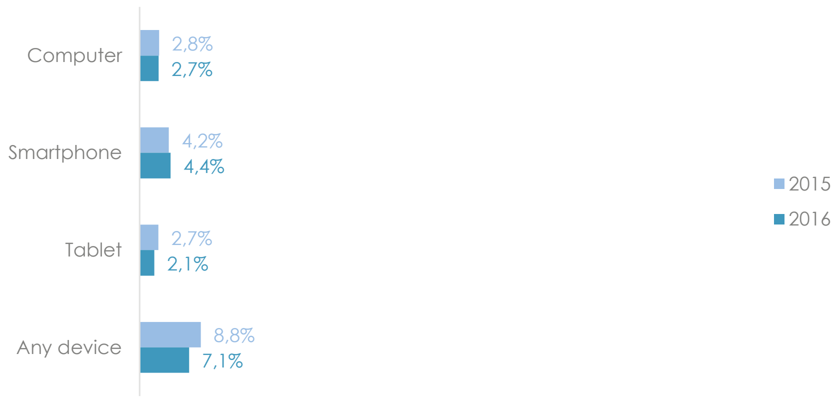
News graph 6: 'Which devices did you use to follow digital news sources during the past month?' - social media (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

DIGITAL NEWS SOURCES USED IN THE LAST MONTH – SEARCH ENGINE



News graph 7: 'Which devices did you use to follow digital news sources during the past month?' - search engine, e.g. Google (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

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



News graph 8: 'Which devices did you use to follow digital news sources during the past month?' - personalized news app, e.g. Flipboard, Zite (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

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

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
News websites	80,4%	88,1%	88,2%	77,2%	68,8%	55,3%	38,6%	68,6%
Downloadable, digital newspaper	32,9%	29,5%	35,6%	34,8%	32,8%	29,3%	23,4%	30,7%
Social media	80,6%	86,9%	76,3%	59,3%	49,0%	35,2%	16,2%	53,6%
Search engine (e.g. Google)	73,5%	74,5%	72,1%	67,6%	58,1%	50,5%	32,5%	58,6%
Personalised news app (e.g. Flipboard)	13,6%	12,1%	9,4%	10,7%	3,6%	2,0%	2,4%	7,1%

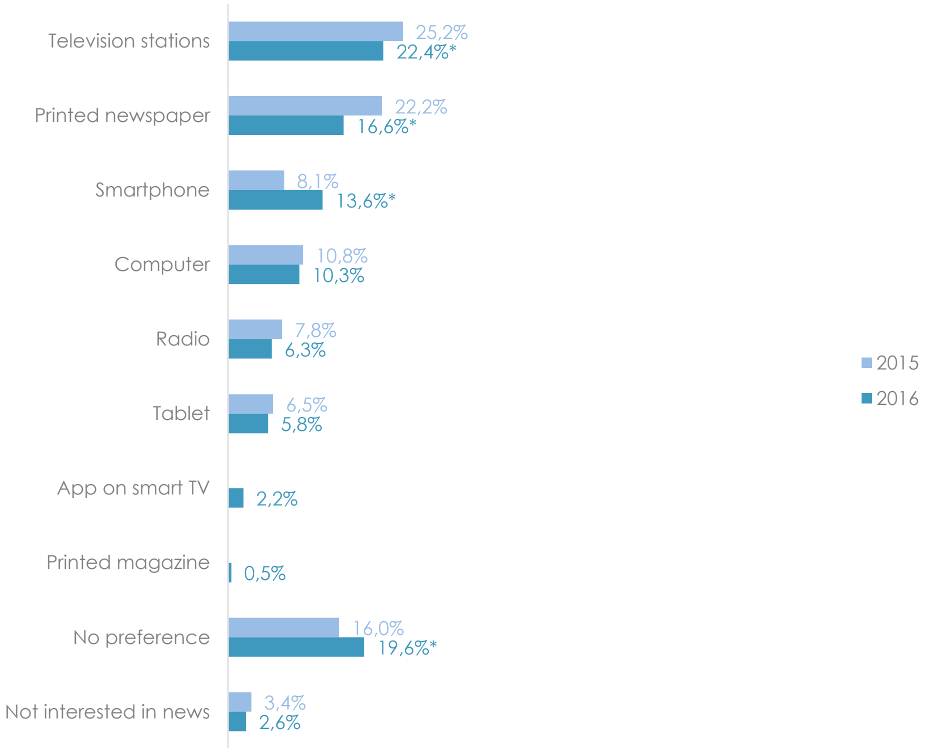
News table 3: 'Which devices did you use to follow digital news sources during the past month?' (% any device) - split by age group (N=2.164)

PREFERRED MEDIA FOR NEWS CONSUMPTION

On a daily basis, listening to the radio (61,6%) and watching national TV broadcasting (54,5%) remain the most common ways of following the news. However, when asked to pick the one source they prefer the most, radio broadcasting is only selected by 6,3% of Flemings. Just as in 2015, television stations (22,4%) and printed newspapers (16,6%) are the most preferred sources. However, their share has dropped significantly (television stations: -2,8 percentage points; printed newspaper: -5,6 percentage points). The smartphone overtook the computer as a device for following the news. While the number of Flemings selecting the computer as most preferred device for monitoring the news has remained the same at 10,3% (-0,5 percentage points), the smartphone experienced an increase of 5,5 percentage points to 13,6%. 1 in 5 Flemings report that they have no preference for a single source or device used to follow the news (19,6%, a significant increase of 3,6 percentage points).

The smartphone is now the most preferred device for following the news among Flemings younger than 40 years old. In 2015, the smartphone was only the single most preferred news monitoring device among 15-19 year olds. For Flemings of 40 years and older, national TV stations and printed newspapers are the most preferred news sources. Flemings aged 50 years and older still prefer the computer over the smartphone.

PREFERRED MEDIA FOR NEWS CONSUMPTION



News graph 9: 'What source or device do you prefer to use to monitor the news?' (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

PREFERRED MEDIA FOR NEWS CONSUMPTION - SPLIT BY AGE GROUP

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Television stations	10,3%	10,8%	15,9%	22,6%	17,9%	23,5%	40,0%	22,4%
Printed newspaper	16,3%	13,8%	9,1%	14,2%	23,1%	24,2%	17,8%	16,6%
Smartphone	40,2%	28,4%	21,4%	11,9%	6,7%	2,4%	2,0%	13,6%
Computer	8,2%	17,4%	14,3%	11,8%	9,6%	8,2%	4,0%	10,3%
Radio	3,2%	4,5%	6,6%	4,6%	8,1%	8,2%	7,2%	6,3%
Tablet	1,9%	6,2%	7,6%	8,5%	7,8%	4,0%	2,6%	5,8%
App on smart TV	2,2%	2,1%	1,9%	1,7%	3,6%	1,5%	2,1%	2,2%
Printed magazine	0,0%	0,2%	0,6%	1,2%	0,5%	0,0%	0,4%	0,5%
No preference	14,4%	13,9%	19,9%	21,6%	18,5%	27,0%	21,5%	19,6%
Not interested in news	3,3%	2,8%	2,7%	1,7%	4,1%	1,0%	2,3%	2,6%

News table 4: 'What source or device do you prefer to use to monitor the news?' (N=2.164) - split by age group (N=2.164)

OPINION ON NEWS CONSUMPTION

The large majority of Flemings still attach high importance to following the news. 85,5% of the Flemish population agrees that following the news is important. However, we do see a remarkable relationship with age. Following the news seems to gain importance with increasing age. 'Only' 65,4% of Flemings aged 15-19 years old think it is important to follow the news; among Flemings aged 60 years and older, this is over 9 in 10. This could indicate that a substantial portion of the youngest generation merely considers following the news as a 'by-product' of their general (social) media consumption, pointing to a more passive approach to following the news.

1 in 6 Flemings consider gossip about the private lives of celebrities as news (16,8%). It is interesting to note that this figure seems to peak within both the youngest (15-19 years old: 23,9%) and the oldest (65+: 21,2%) age segments.

Overall, Flemings seem to appreciate the news coverage by Flemish news media. 60,2% of Flemings indicate satisfaction with the content on Flemish news media. This figure seems to persist across all age groups.

Over 1 in 3 Flemings say that they only want to follow news on topics they are interested in (35,8%). Interestingly, mainly the youngest age segments seem to agree with this statement. This may come as no surprise, as these are also the age segments that most often use social media as news sources, where filtered content is prevalent.

Medialaan (since 2014) and VRT (since 2016) have stopped offering content via Teletekst (with subtitling as the only remaining function of this service). 37,3% of Flemings indicate they are disappointed with that decision. Although this seems especially the case for Flemings aged 50 years and older, it is remarkable that even 31,4% of 15-19 year old Flemings agreed with this statement.

OPINION ON NEWS CONSUMPTION

	(Totally) disagree	Neutral	(Totally) agree
I think it's important to follow the news	5,3%	9,2%	85,5%
I consider gossip about the private lives of celebrities as news	57,2%	26,0%	16,8%
I am satisfied with the content on Flemish news media	11,8%	28,0%	60,2%
I only want to follow news on topics I am interested in	26,6%	37,6%	35,8%
It is a pity that Teletekst has been shut down	33,6%	29,1%	37,3%

News table 5: 'To what extent do you agree with the following statements?' (on a 5-point scale) (N=2.164)

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

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
I think it's important to follow the news	65,4%	79,5%	81,6%	89,0%	85,2%	90,5%	93,6%	85,5%
I consider gossip about the private lives of celebrities as news	23,9%	12,5%	14,3%	15,1%	17,0%	12,7%	21,2%	16,8%
I am satisfied with the content on Flemish news media	56,7%	52,3%	56,6%	63,7%	63,5%	64,7%	61,8%	60,2%
I only want to follow news on topics I am interested in	50,4%	45,9%	47,0%	36,8%	38,0%	22,3%	20,2%	35,8%
It is a pity that Teletekst has been shut down	31,4%	28,9%	24,6%	39,9%	42,4%	47,5%	43,4%	37,3%

News table 6: Share (totally) agree with the statements (on a 5-point scale) - split by age group (N=2.164)

NEWS CONSUMPTION: DIGIMETER PROFILES

DISRUPTOR (24,1%)

Disruptors are not the biggest fans of actively following the news. 77% of Disruptors think following the news is important, which is the lowest proportion of all segments. Traditional news media platforms in particular, such as the printed newspaper (11%), national TV stations (21%) and radio stations (32%), are not likely to be used on a daily basis. But Disruptors are not even the highest consumers of news via smartphone (54%, while this is 65% among Cumulators). More than other segments, Disruptors rely on social media to be kept up-to-date with the news (72%). This can be related to the fact that they support the idea of seeing only news articles that match their interests (44%), as social media (and especially Facebook) act as gatekeepers that select which updates are shown in newsfeeds (based on users' interests and contacts).

CUMULATOR (38,6%)

Cumulators are news junkies, relying on a mix of traditional and digital sources to keep up to date. The radio (78%), the smartphone (65%) and national TV broadcasting (62%) are most commonly used on a daily basis within this segment. They do attach high importance to following the news, as 91% agree that following the news is important. Flemish news media offer high-quality content, according to the majority of Cumulators (70%).

STRUGGLER (10,9%)

Daily news consumption through traditional news sources is high among Strugglers. 72% follow the news on the radio every day, and 70% do so through national TV broadcasting. If they had to choose one favorite news source or device, they choose the TV set (27%). Illustrative for this segment is the high frequency of using the tablet to follow the news (48%, which is higher than among any other segment). 43% of the Strugglers consume news via a computer on a daily basis, which is at the same level as Cumulators (46%) and higher than among Disruptors (36%). Although the smartphone is less of a daily gateway to news (31%) for Strugglers compared to Disruptors (54%) and Cumulators (65%), it is still at the same level as reading a printed newspaper every day (31%) and watching the news on regional TV stations (31%).

Strugglers think it is important to follow the news, and are glad that the quality of Flemish news media meets high standards (61%). Remarkably, this segment regrets the most that the Teletekst service has been shut down in Flanders (52%).

RESISTOR (26,3%)

When it comes to following the news, Resistors rely on national TV broadcasting (68%), radio (60%) and printed newspapers (38%). Online news sources are not totally disregarded, as 27% use a smartphone every day to follow the news, 26% use a tablet and 25% use a computer. This is, however, a significantly lower use rate compared to those of other profiles.

When asked to choose their favorite news source, they tend to stick to traditional sources and devices. 35% prefer TV broadcasting, 20% prefer the printed newspaper, and 10% prefer radio broadcasting to keep up-to-date with the news.

Resistors do attach importance to following the news, as 86% agree that following the news is important. Moreover, they show an open minded attitude when it comes to news: only 19% are interested only in receiving updates on topics they are interested in. 45% are disappointed that VRT and Medialaan have stopped offering the Teletekst service.

Sources/devices to follow the news (daily basis)

	National TV broadcasting	Regional TV broadcasting	Radio	Printed newspaper	Computer	Smartphone	Tablet
Disruptor	21%	2%	32%	11%	36%	54%	25%
Cumulator	62%	14%	78%	34%	46%	65%	41%
Struggler	70%	31%	72%	31%	43%	31%	48%
Resistor	68%	27%	60%	38%	25%	27%	26%

Digital news sources

	News websites	Digital, downloadable newspaper	Social media	Search engine	Personalized news app
Disruptor	79%	27%	72%	70%	8%
Cumulator	88%	44%	71%	76%	10%
Struggler	72%	35%	52%	63%	7%
Resistor	29%	13%	12%	21%	1%

Favorite news source

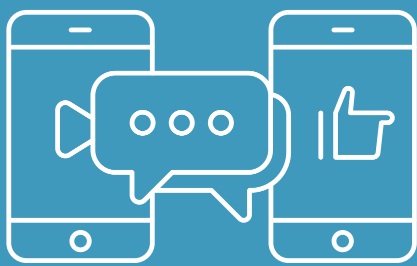
	Smartphone	Computer	Tablet	Printed newspaper	TV set	Radio
Disruptor	27%	19%	5%	11%	12%	3%
Cumulator	16%	10%	8%	18%	19%	5%
Struggler	5%	11%	7%	17%	27%	7%
Resistor	1%	4%	2%	20%	35%	10%

Statements (% (totally) agree)

	I think it's important to follow the news	I consider gossip about the private lives of celebrities as news	I am satisfied with the content on Flemish news media	I only want to follow news on topics I am interested in	It is a pity that Teletekst has been shut down
Disruptor	77%	14%	49%	44%	29%
Cumulator	91%	16%	70%	42%	33%
Struggler	86%	22%	61%	38%	52%
Resistor	86%	19%	55%	19%	45%

CHAPTER 05

SOCIAL MEDIA



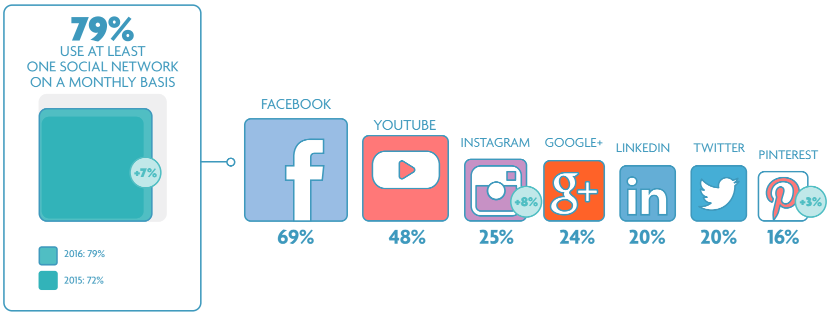
DIGIMETER INFOGRAPHIC

SOCIAL MEDIA

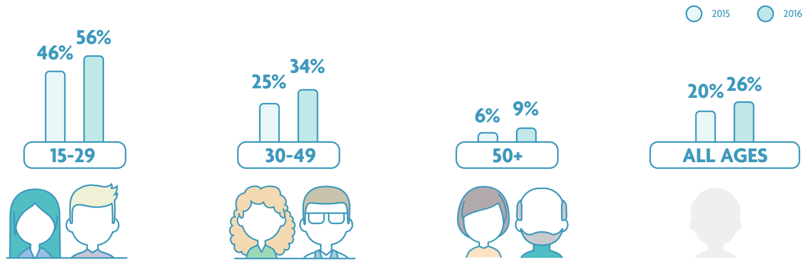
Youngsters share more than ever (but not on Facebook)

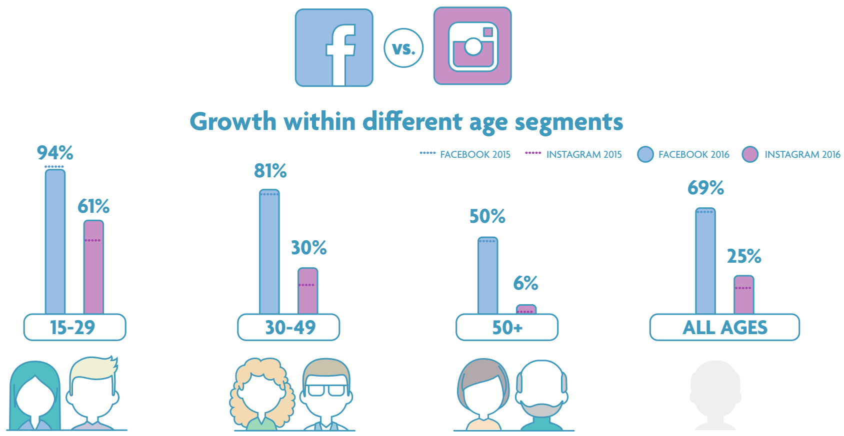
Social media use:

Almost 4 out of 5 Flemings log in at least monthly



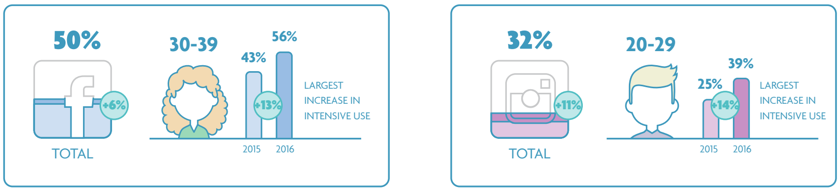
More than half of 15-29 year olds use at least 4 different social networks on a monthly basis



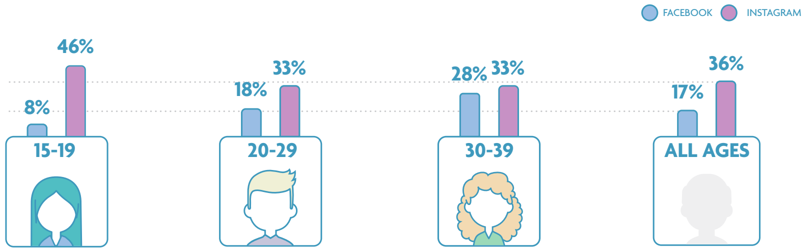


Growth within different age segments

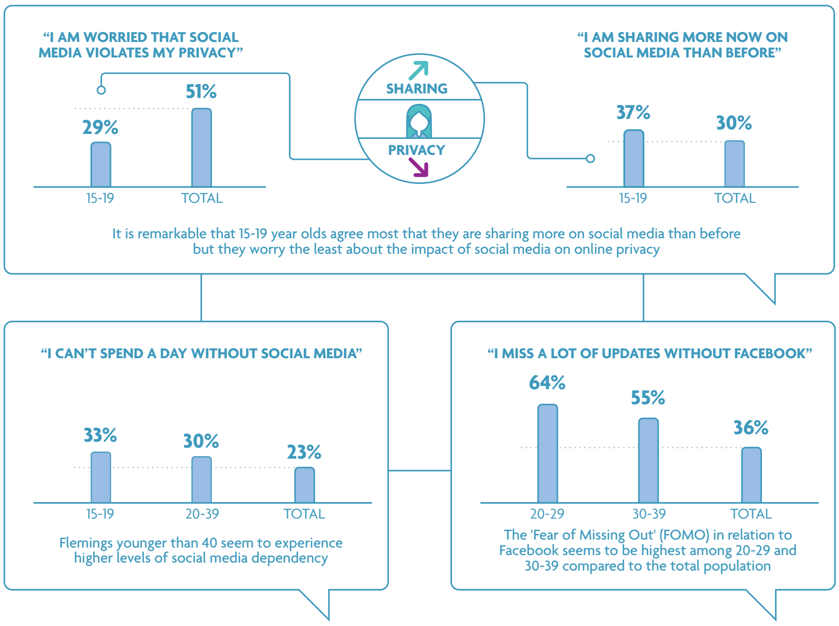
Intensive usage:
At least one hour a day



Posting pictures:
Strong age difference between Facebook and Instagram users



Privacy & dependency on social media
Younger people are more dependent



SOCIAL MEDIA

ACCOUNT OWNERSHIP

Facebook remains the social network with the most accounts in Flanders. 69,3% of Flemings have a personal account, and 2,2% share an account with someone else. Adding the 3,2% of the Flemish population who claim to have deleted their Facebook accounts, we can conclude that 3 in 4 Flemings have had an account on Facebook at one point in time.

Twitter has the highest number of former users who have deleted their accounts (4,7%), followed by LinkedIn (3,4%), Facebook (3,2%) and Foursquare (3,0%).

Over 1 in 5 Flemings claim to use YouTube without (consciously) logging into a personal account (21,1%). It has to be noted that we can only report the perceptions of the respondents. It is likely that a number of those unregistered users are in fact automatically signed in through their Google accounts. Google+ also has a substantial amount of users claiming to use the network without logging in (8,9%).

The number of Flemings who have ever had an account on Instagram has increased significantly by 8,4 percentage points to 33,0% of the Flemish population. Pinterest (+5,1 percentage points to 27,2%) and LinkedIn (+3,1 percentage points to 33,9%) are the other social networks that have experienced significant growth in the number of Flemings who have had an account.

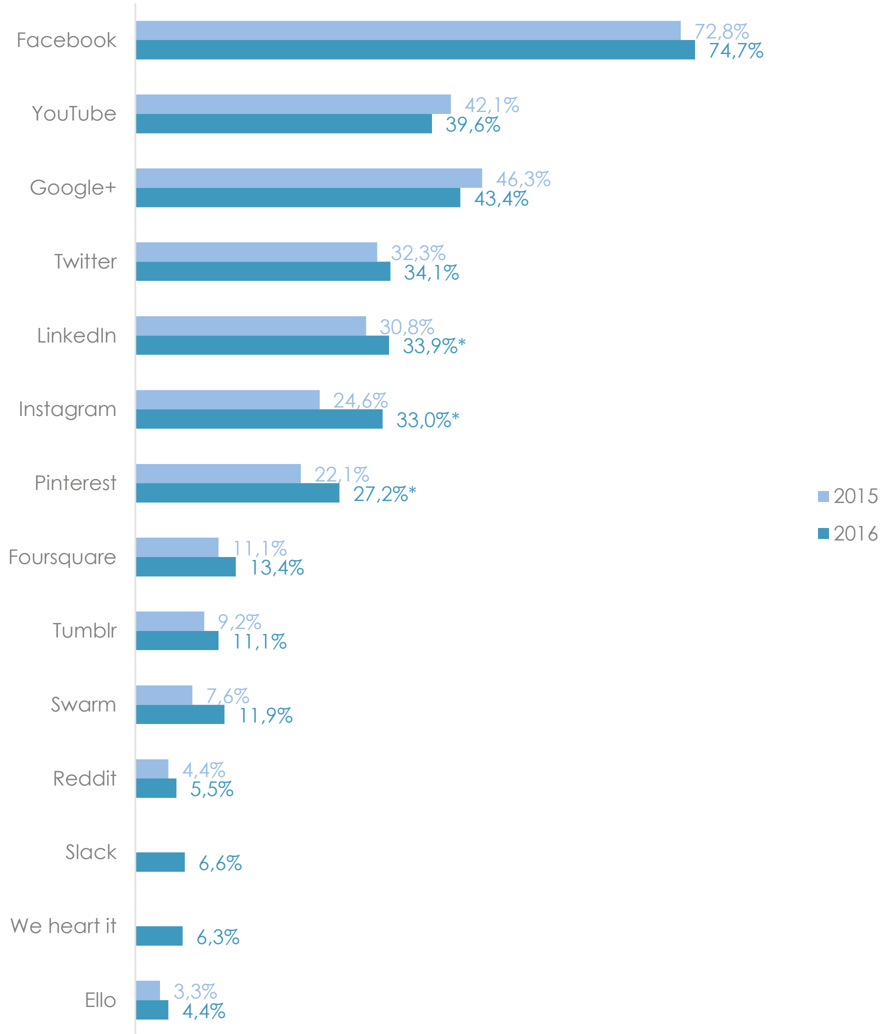
ACCOUNT HOLDERS ON LISTED SOCIAL MEDIA

	Ever had an account	Own/ personal account	Shared account	Deleted account	Use without logging in
Facebook	74,7%	69,3%	2,2%	3,2%	2,0%
YouTube	39,6%	36,6%	1,9%	1,1%	21,1%
Google+	43,4%	39,9%	1,3%	2,2%	8,9%
Twitter	34,1%	28,6%	0,8%	4,7%	2,8%
LinkedIn	33,9%	29,9%	0,6%	3,4%	2,3%
Instagram	33,0%	30,6%	0,8%	1,6%	2,5%
Pinterest	27,2%	23,8%	0,6%	2,9%	2,7%
Foursquare	13,4%	10,0%	0,4%	3,0%	1,2%
Tumblr	11,1%	8,6%	0,3%	2,2%	2,7%
Swarm	11,9%	10,3%	0,4%	1,2%	0,5%
Reddit	5,5%	4,5%	0,3%	0,7%	3,1%
Slack	6,6%	5,5%	0,3%	0,8%	0,6%
We heart it	6,3%	5,4%	0,2%	0,7%	0,8%
Ello	4,4%	3,1%	0,3%	1,0%	0,2%

Social media table 1: 'Do you have an account with the following social media?' (N=2.164)

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

EVER HAD AN ACCOUNT ON SOCIAL MEDIA



Social media graph 1: 'Ever had an account on the listed social media?' (N=2.164)
*Statistically significant change compared to the previous year, based on a chi-square test.

USE OF SOCIAL MEDIA

MONTHLY USE OF SOCIAL MEDIA

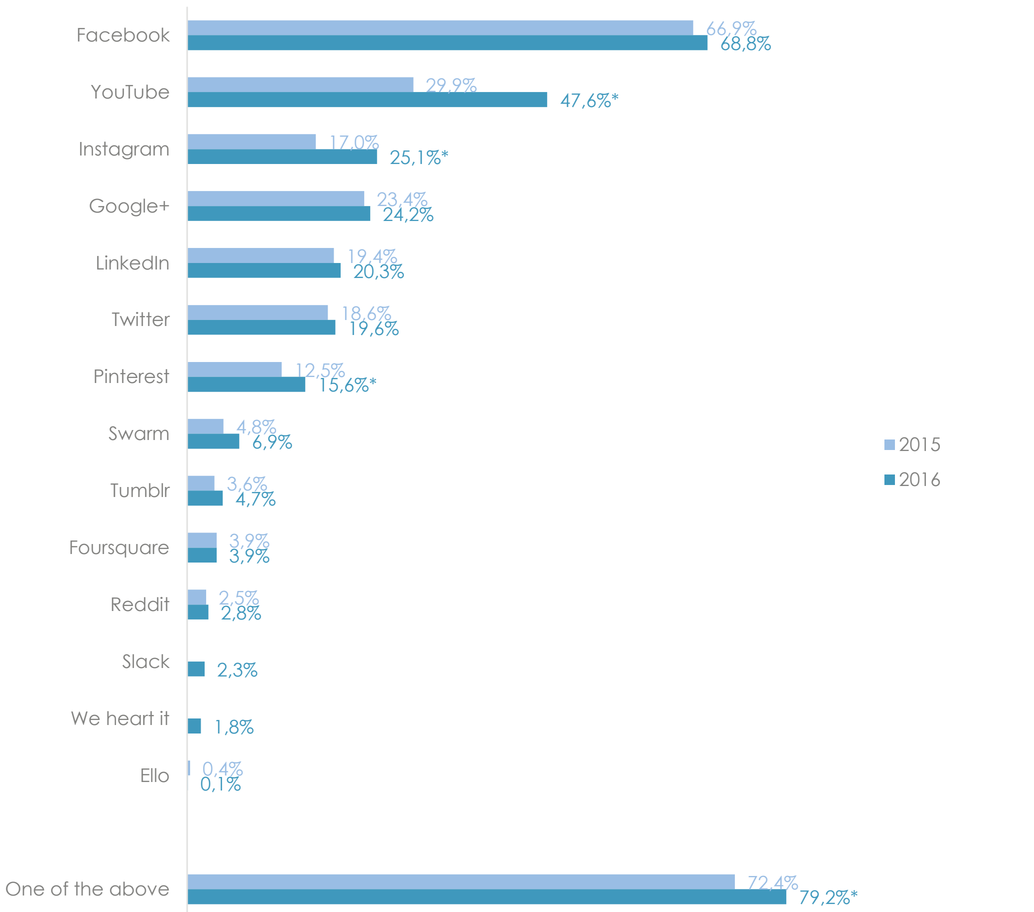
Almost 8 in 10 Flemings have used a social network within the past month (79,2%), which is a significant increase compared to last year (+6,8 percentage points). Facebook remains the most popular social network in Flanders, with almost 7 in 10 Flemings having accessed this network in the past month. YouTube remains in second place, with 47,6% of Flemings having used this network at least once last month. As explained in the remark attached to the graph below, the increase of 17,7 percentage points for YouTube should be approached with caution, as this could largely be the effect of a change in formulation of the question.

Next to YouTube, Instagram (+8,1 percentage points) and Pinterest (+3,1 percentage points) are the only other social networks that have experienced a significant increase of monthly users. Instagram attracts a quarter of the Flemish population, while Pinterest reaches 15,6% of Flemings.

Facebook is the network with the most monthly users across all age groups. Instagram still attracts mainly users from younger age segments. As a network for professional relationships, it comes as no surprise that LinkedIn is mainly popular within the 20-49 age range.

When comparing the evolution of monthly users of Facebook to the evolution of the Instagram user base, we see that Facebook is only (slightly) increasing among the Flemings older than 30, while the user base of Instagram is considerably growing among all age groups. Among the 15-29 year old Flemings, the share of monthly Instagram users grows from 48% in 2015 to 61% in 2016.

MONTHLY USE OF SOCIAL MEDIA



Social media graph 2: 'Which of the listed social media platforms have you used during the past month?' (N=2.164)

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

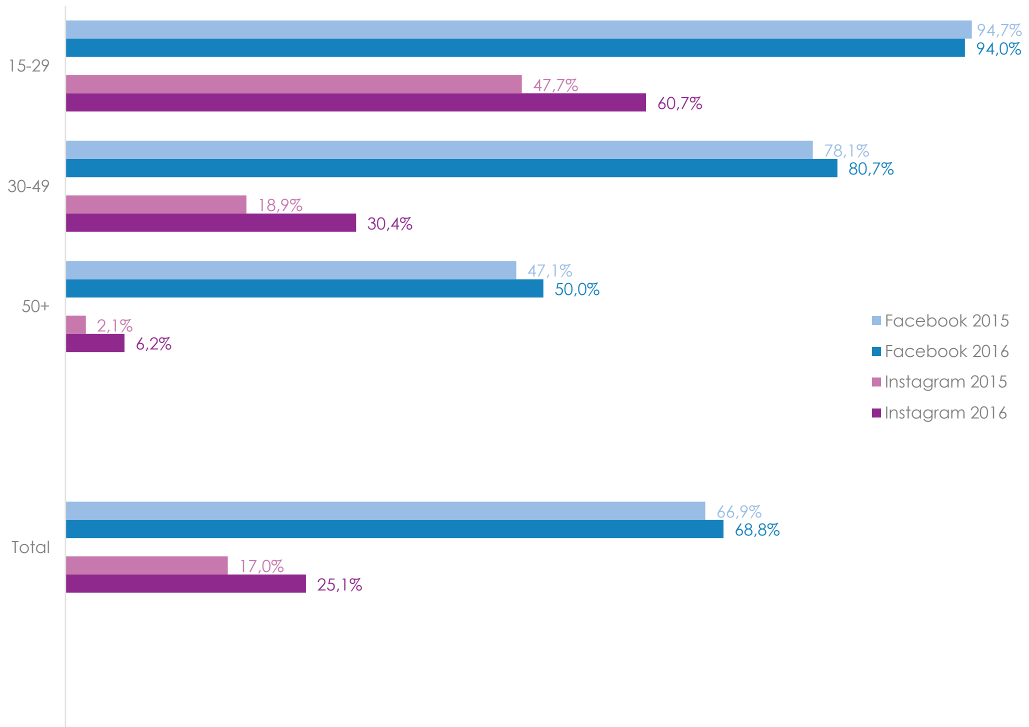
** The large increase in monthly YouTube users could be (largely) due to a change in the survey compared to last year. In 2015, we investigated the number of Flemings that had logged into a specific social network during the past month. This year, however, we reformulated the question to ask whether they had used the specific network during the last month (without the notion of having logged into that network or not). As table 1 points out, the number of people that use YouTube without logging in is remarkably high, potentially affecting the results displayed in this graph.

MONTHLY USE OF SOCIAL MEDIA - SPLIT BY AGE GROUP

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Facebook	93,1%	94,4%	88,7%	73,4%	70,3%	58,8%	32,0%	68,8%
YouTube	82,9%	77,4%	64,6%	56,0%	35,5%	38,6%	14,2%	47,6%
Instagram	70,5%	56,2%	40,9%	20,7%	11,2%	4,4%	3,0%	25,1%
Google+	39,4%	28,2%	23,6%	27,8%	26,6%	21,8%	14,2%	24,2%
LinkedIn	3,6%	28,8%	33,0%	29,1%	23,3%	8,2%	7,0%	20,3%
Twitter	31,4%	30,5%	30,0%	25,6%	16,0%	7,0%	5,2%	19,6%
Pinterest	19,0%	26,4%	27,0%	18,1%	13,4%	9,0%	2,5%	15,6%
Swarm	21,9%	22,2%	7,8%	4,5%	2,1%	0,0%	0,2%	6,9%
Tumblr	16,7%	10,8%	6,7%	2,8%	3,0%	1,0%	0,0%	4,7%
Foursquare	5,2%	11,1%	6,0%	3,4%	2,8%	0,0%	0,2%	3,9%
Reddit	0,3%	11,8%	5,7%	1,2%	0,4%	0,0%	0,0%	2,8%
Slack	0,0%	6,5%	5,0%	2,7%	0,6%	1,6%	0,0%	2,3%
We heart it	15,1%	3,5%	1,7%	0,1%	0,0%	1,0%	0,0%	1,8%
Ello	0,0%	0,1%	0,5%	0,1%	0,0%	0,0%	0,0%	0,1%

Social media table 2: 'Which of the listed social media platforms have you used during the past month?' - split by age group (N=2.164)

FACEBOOK VS. INSTAGRAM - EVOLUTION SPLIT BY AGE GROUP



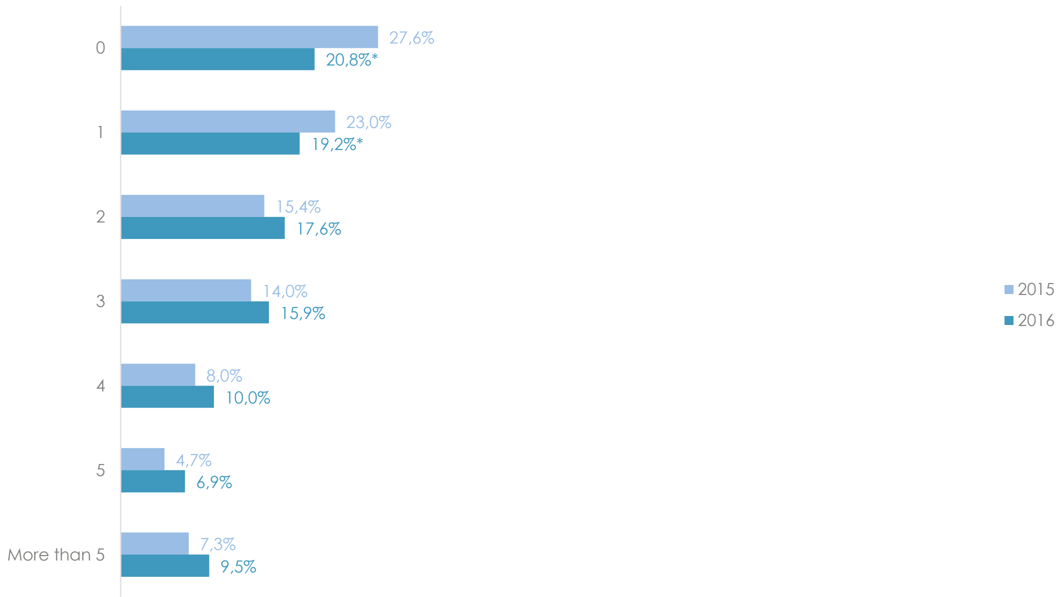
Social media graph 3: Facebook versus Instagram - evolution split by age group (N=2.164)

NUMBER OF SOCIAL MEDIA USED ON MONTHLY BASIS

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

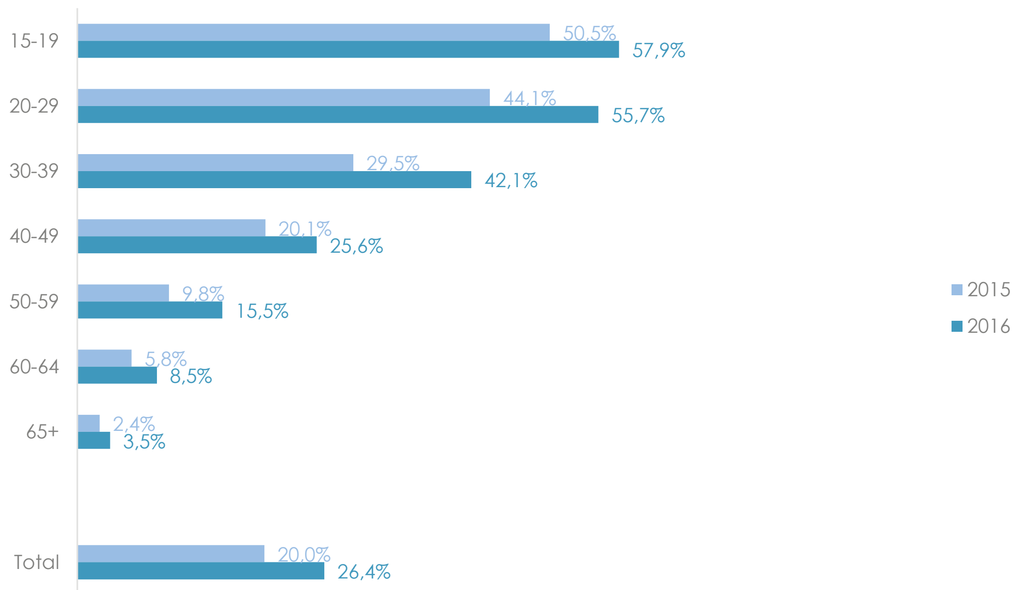
Over half of 15-29 year old Flemings use at least 4 social networks per month. Within the 15-19 age range, that number increased from 50,5% in 2015 towards 57,9% in 2016. The amount of 20-29 year olds using at least 4 social media increased significantly from 44,1% to 55,7%. The largest year-on-year increase is to be found within the 30-39 age range. In that segment, the number of Flemings using at least 4 social networks increased from 29,5% to 42,1% (+12,6 percentage points).

NUMBER OF SOCIAL MEDIA USED DURING THE LAST MONTH



Social media graph 4: 'Which of the listed social media platforms have you used during the past month?' - count (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

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



Social media graph 5: At least 4 social networks selected for question 'Which of the listed social media platforms have you used during the past month?' (N=2.164)
* Statistically significant change compared to the previous year, based on a chi-square test.

FREQUENCY OF USING SOCIAL MEDIA

Just as in previous years, Facebook has the highest usage frequency. Half of Facebook users spend at least 1 hour per day (49,6%) on the social network. This share has significantly increased compared to 2015 (+5,8 percentage points). 13,6% of Flemish Facebook users claim to spend over 3 hours a day on the social network.

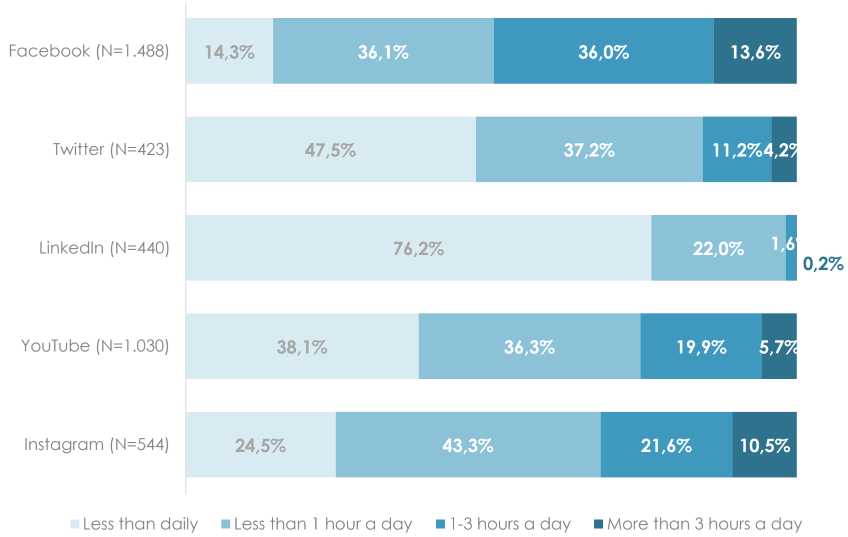
Instagram seems to be the only social network that can measure up to the usage frequency of Facebook. 32,1% of Instagram users use this service for at least 1 hour every day. That is a significant increase compared to 20,6% in 2015. 10,5% of Instagram users spend more than 3 hours per day using this network.

When we take a closer look at the evolution of Instagram compared to Facebook, we notice that the number of Facebook users that spend at least 1 hour per day on Facebook has not increased significantly among Flemings aged 15-19 (from 69,6% in 2015 to 70,7% in 2016). The highest increase is among Facebook users aged 30-39 (from 42,7% in 2015 to 56,3% in 2016). The share of Instagram users that spend at least 1 hour per day on Instagram is mainly increasing among Instagram users aged 15-19 (from 43,0% in 2015 to 52,0% in 2016) and among users aged 20-29 (from 24,7% in 2015 to 38,7% in 2016).

A quarter of the users of YouTube use this platform for at least an hour a day (25,6%), and 5,7% use this social network for at least 3 hours a day.

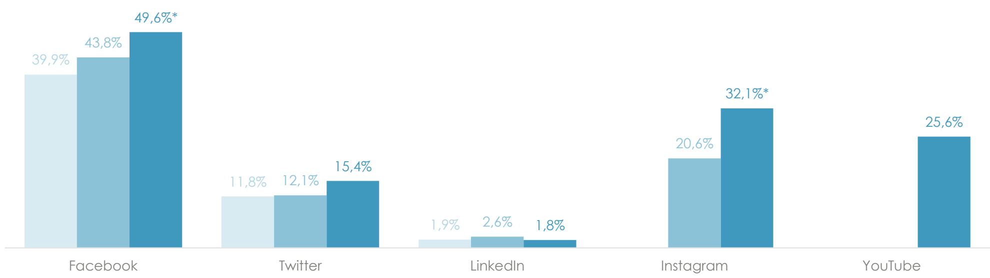
Other social media seem to experience lower usage. 15,4% of Twitter users and 1,8% of LinkedIn users tend to use the service for at least one hour a day, the same level as last year. 3 in 4 of LinkedIn users state using the service less than daily (76,2%).

FREQUENCY OF USING SOCIAL MEDIA



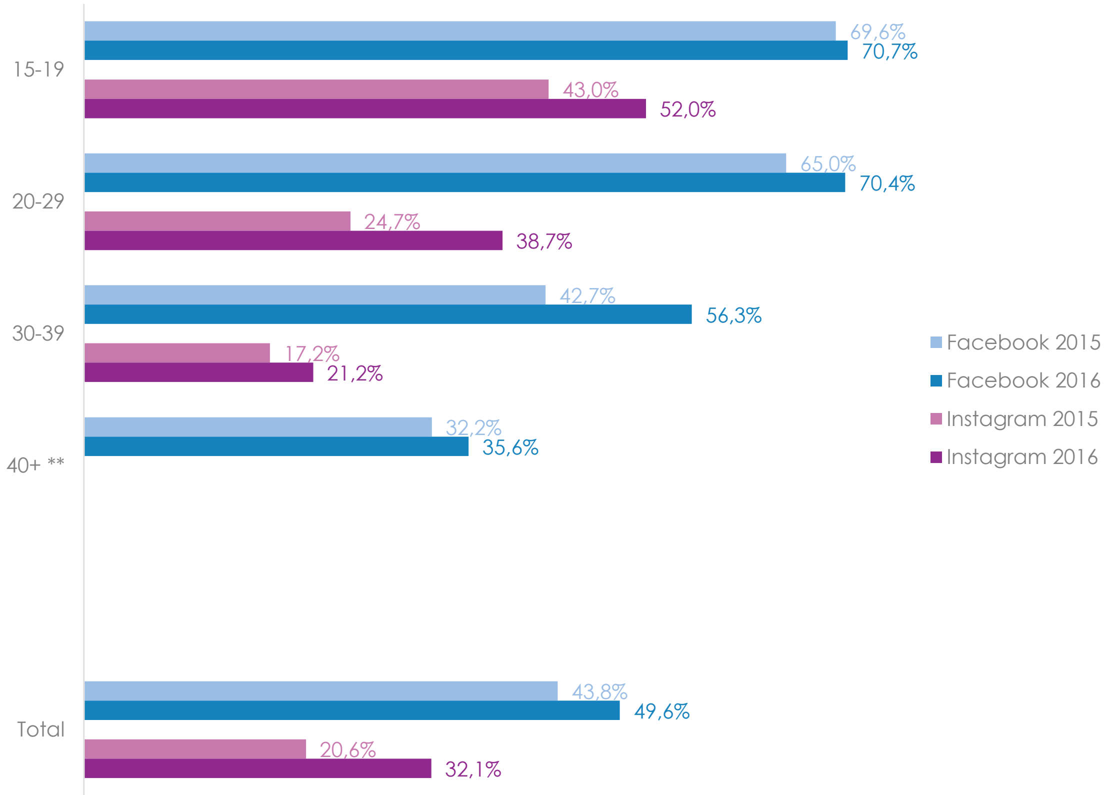
Social media graph 6: 'How often do you use this social network?' (of those who have used that specific social network during the past month)

USING SOCIAL MEDIA AT LEAST 1 HOUR A DAY - EVOLUTION 2014-2016



Social media graph 7: Using social media at least 1 hour a day - evolution 2014-2016 (of those who have used that specific social network during the past month)
* Statistically significant change compared to the previous year, based on a chi-square test.

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



Social media graph 8: Using Facebook vs. Instagram at least 1 hour a day - evolution split by age groups (of those who have used the specific social network during the past month).
** Sample size of Instagram users 40+ too low to allow for assumptions

MOST PREFERRED SOCIAL NETWORK

An often-heard remark is that Facebook may be the social network with the highest number of users worldwide, but that it is not the network that people love to use the most. News about the filter bubble, privacy issues and the use of personal data for targeted advertising was predicted to have harmed the image of the network.

At the first glance, this statement is not confirmed by the results. Almost 2 in 3 Flemings who use at least 2 social networks on a monthly basis identify Facebook as their network of choice (64,0%). YouTube (12,0%) and Instagram (8,4%) follow by quite a distance. Even for the youngest segment (15-19 year olds), Facebook is the most preferred social network (44,4%).

However, we do find that Facebook is less of a definitive leader within the youngest segment compared to other age segments. Less than half of 15-19 year old Flemings (using at least 2 social networks per month) choose Facebook as their favorite network. Among the other age segments, Facebook is chosen as favorite by at least 6 in 10 Flemings. The difference between Facebook and Instagram is 20 percentage points within the youngest segment, while the difference between Facebook and the second most preferred social network within other age segments is at least 50 percentage points. This adds up to the image that within the youngest age group, Facebook is experiencing competition to win users' hearts.

MOST PREFERRED SOCIAL NETWORK

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Facebook	44,4%	62,7%	67,7%	65,8%	66,0%	65,5%	72,2%	64,0%
YouTube	22,0%	12,8%	9,3%	13,8%	10,9%	8,1%	5,3%	12,0%
Instagram	24,4%	13,8%	8,3%	5,0%	2,0%	0,0%	2,1%	8,4%
Twitter	3,9%	4,0%	4,8%	4,9%	6,7%	4,2%	1,5%	4,6%
Google+	0,7%	0,0%	1,2%	3,4%	3,3%	16,5%	11,4%	3,2%
LinkedIn	0,0%	0,2%	3,0%	3,5%	6,3%	3,7%	5,3%	3,0%
Pinterest	2,2%	1,7%	3,6%	3,2%	4,7%	0,0%	2,3%	2,9%
Reddit	0,0%	2,7%	1,2%	0,4%	0,0%	0,0%	0,0%	0,9%
Tumblr	0,8%	1,3%	0,0%	0,0%	0,0%	0,0%	0,0%	0,3%
Swarm	1,3%	0,6%	0,3%	0,0%	0,0%	0,0%	0,0%	0,3%
Slack	0,0%	0,2%	0,6%	0,0%	0,0%	1,9%	0,0%	0,3%
Foursquare	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Ello	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
We heart it	0,3%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%

Social Media table 3: 'What social network do you enjoy the most?' - split by age group (of Flemings using at least 2 social networks, N= 1.297)

ACTIVITIES ON SOCIAL MEDIA

ACTIVITIES ON FACEBOOK

Liking someone else's post (42,2%) and posting a reaction to someone else's post (22,8%) are the activities most performed on Facebook on a daily basis. Almost half of Facebook users have never posted a video on this network (48,0%).

It seems that the youngest age segment (15-19 years old) is not the most active age segment on Facebook. They are less likely to share someone else's post, post a status update or post photos on Facebook on a weekly basis compared to 20-39 year old Flemings. This may supplement what we concluded previously (see 'Most preferred social network'): Young people may enjoy the quality of Facebook of connecting you to everyone you know (because it has a far larger user base compared to other social media), but for some activities, they prefer other apps or social networks (e.g. sharing photos on Instagram).

ACTIVITIES ON FACEBOOK

	Ever	Monthly	Daily
Like someone else's post	92,4%	79,8%	42,2%
Post a reaction to someone else's post	91,1%	70,8%	22,8%
Share someone else's post	81,3%	49,1%	9,3%
Posting a status update	81,1%	37,4%	7,1%
Posting photos	85,5%	40,7%	3,5%
Sharing a link to a news article	68,2%	30,3%	3,5%
Adapting my privacy settings	79,4%	22,8%	2,8%
Indicating whether you'll attend an event or not	74,6%	40,5%	2,5%
Posting videos	52,0%	14,9%	2,3%
Announcing an event	64,6%	21,2%	1,8%

Social media table 4: 'How often do you engage in following activities on Facebook?' (of those using Facebook in the past month, N= 1.488)

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

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Like someone else's post	78,1%	80,2%	76,4%	67,4%	66,8%	63,8%	47,2%	70,1%
Post a reaction to someone else's post	53,1%	56,7%	57,1%	54,5%	56,3%	43,0%	37,1%	53,0%
Share someone else's post	5,5%	17,0%	36,9%	36,0%	37,9%	37,1%	28,8%	29,4%
Posting a status update	6,6%	20,9%	30,7%	26,6%	20,3%	23,6%	17,2%	22,2%
Indicating whether you'll attend an event or not	38,6%	34,0%	18,6%	13,7%	12,1%	7,5%	3,4%	19,1%
Posting photos	8,1%	17,9%	27,6%	20,6%	13,7%	15,2%	7,4%	17,3%
Sharing a link to a news article	10,8%	10,2%	16,4%	22,1%	19,3%	8,3%	12,9%	15,3%
Posting videos	5,6%	6,4%	10,8%	9,1%	5,5%	3,6%	3,4%	7,0%
Announcing an event	3,8%	5,9%	5,4%	7,6%	10,8%	3,2%	4,0%	6,4%
Adapting my privacy settings	10,3%	7,8%	6,5%	5,3%	6,3%	4,6%	2,0%	6,2%

Social media table 5: 'How often do you engage in following activities on Facebook?' (weekly basis) - split by age group
(of those using Facebook in the past month, N= 1.488)

ACTIVITIES ON TWITTER

Fewer than 1 in 10 Twitter users state performing at least one of the enlisted activities on a daily basis. 9,0% claim to like tweets every day. Moreover, less than half of the Twitter users do at least one of the enlisted activities on a monthly basis. This adds to the image that most Twitter users are largely passive users (scrolling through tweets without performing any action or adding content themselves). 1 in 3 Twitter users in Flanders have never tweeted a photo (34,3%).

ACTIVITIES ON TWITTER

	Ever	Monthly	Daily
Liking someone else's tweet	73,5%	40,7%	9,0%
Posting a tweet	75,9%	35,4%	5,5%
Sharing someone else's tweet (retweeting)	72,9%	38,0%	5,4%
Reacting to someone else's tweet (replying)	71,2%	29,4%	4,9%
Sharing a link to a news article	62,7%	26,1%	2,5%
Tweeting a photo	65,7%	22,8%	1,1%

Social media table 6: 'How often do you engage in following activities on Twitter?' (of those using Twitter during the past month, N= 423)

ACTIVITIES ON INSTAGRAM

Over 4 in 10 Instagram users state liking photos on Instagram on a daily basis (43,2%). Posting a photo is a daily habit for only 8,7% of Instagram users. 6 in 10 users do, however, claim to post at least 1 photo per month.

In contrast to Facebook, we can conclude that the youngest age segment is clearly the most productive generation on Instagram: 9 in 10 of 15-19 year old Instagram users like a photo on a weekly basis, 6 in 10 react to someone else's photo every week, and almost half post a photo at least once a week. So, it does seem that to 15-19 year old Flemings, Instagram is a more productive social network than Facebook.

ACTIVITIES ON INSTAGRAM

	Ever	Monthly	Daily
Liking someone else's photo	91,2%	80,6%	43,2%
Reacting to someone else's photo	88,0%	62,9%	15,0%
Posting a photo	85,7%	60,9%	8,7%
Sending a private message	60,8%	28,5%	7,7%
Posting a video	59,0%	21,8%	2,5%

Social media table 7: 'How often do you engage in following activities on Instagram?' (of those using Instagram in the past month, N= 544)

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

	15-19	20-29	30-39	40-49	50+	Total
Liking someone else's photo	89,1%	76,8%	57,2%	59,8%	52,3%	69,1%
Reacting to someone else's photo	60,3%	35,5%	36,4%	44,3%	35,9%	41,5%
Posting a photo	46,3%	32,8%	33,1%	39,8%	27,7%	35,6%
Sending a private message	30,5%	13,5%	6,6%	16,3%	14,1%	15,5%
Posting a video	9,3%	7,6%	7,6%	18,4%	12,3%	9,8%

Social media table 8: 'How often do you engage in following activities on Instagram?' (weekly basis) - split by age group (of those using Instagram during the past month, N= 544)

OPINION ON SOCIAL MEDIA

Half of Flemings do worry about the impact of social media on their privacy (51,4%). Interestingly, the age segments that use social media the most tend to agree less with this statement. Only 28,9% of 15-19 year old Flemings and 46,7% of 20-29 year old Flemings agree with this statement.

'Fomo' ('The Fear Of Missing Out') is not a rare phenomenon when it comes to Facebook. 36,2% of Flemings fear that without a Facebook account, they would miss important updates and events. This seems especially true within the 15-39 year old age range.

Social media can be time-consuming and even addicting. 30,4% of the social media users in Flanders think they spend too much time on social media, and 22,5% can't imagine a day without social media. Not surprisingly, this conviction is especially shared among 15-39 year old social media users.

30,3% of social media users claim that they share more on social media than ever before. However, 73,7% of social media users state that they are well aware of what they are sharing and with whom.

Social media can be a gateway to 'lure' people to other media. Over 1 in 3 of social media users in Flanders agree that they can be triggered to watch a TV program by a message on social media (35,0%). 15-39 year old Flemings in particular seem to recognize themselves in that statement.

A majority of Flemings claim they only log into social media on devices they do not share with others, avoiding the hassle of switching accounts between different users of the device (55,8%).

A quarter of the Facebook users in Flanders have no personal relationship (anymore) with most of their contacts ('friends') on Facebook. Among 15-29 year olds, this is as much as 1 in 3. This could indicate a change in the way (especially younger) Flemings think about the process of adding 'friends' to their list of contacts. They seem to no longer only add friends they personally know from 'offline' life, but also people they have never met 'in real life' or don't have face-to-face contact with.

OPINION ON SOCIAL MEDIA

	(Totally) disagree	Neutral	(Totally) agree
I am worried that social media violate my privacy	19,8%	28,9%	51,4%
Without a Facebook account you miss a lot of updates and event announcements	36,4%	27,3%	36,2%
I am spending too much time on social media**	39,4%	30,2%	30,4%
I can't spend a day without social media **	59,2%	18,2%	22,5%
I am sharing more now on social media than before **	48,1%	21,6%	30,3%
Messages on social media about TV programs can trigger me to watch that program **	36,2%	28,7%	35,0%
I always consciously reflect on what to share on social media with who **	7,2%	19,1%	73,7%
I only log into social media on devices exclusively used by myself (not on shared devices) **	23,6%	20,5%	55,8%
I don't have a personal relationship (anymore) with most of my 'friends' on Facebook ***	48,0%	27,0%	25,0%

Social media table 9: 'To what extent do you agree with the following statements?' (on a 5-point scale) (N=2.164, except where indicated otherwise)
** Filtered by those who have visited at least one social network during the past month (N=1.714)
*** Filtered by those who have a personal Facebook account (N=1.506)

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

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
I am worried that social media violate my privacy	28,9%	46,7%	51,0%	52,4%	59,8%	56,8%	52,2%	51,4%
Without a Facebook account you miss a lot of updates and event announcements	46,7%	64,0%	54,8%	37,4%	26,6%	21,4%	15,5%	36,2%
I am spending too much time on social media**	44,0%	54,4%	38,8%	23,2%	19,6%	14,0%	10,5%	30,4%
I can't spend a day without social media **	32,9%	30,1%	30,4%	14,9%	16,0%	26,3%	11,9%	22,5%
I am sharing more now on social media than before **	37,1%	28,3%	36,4%	31,7%	29,1%	27,5%	20,7%	30,3%
Messages on social media about TV programs can trigger me to watch that program **	47,6%	49,8%	43,3%	30,3%	24,8%	22,9%	22,3%	35,0%
I always consciously reflect on what to share on social media with who **	73,0%	75,5%	78,7%	73,3%	76,5%	71,2%	62,7%	73,7%
I only log into social media on devices exclusively used by myself (not on shared devices) **	55,5%	53,9%	57,9%	58,8%	54,6%	56,0%	53,0%	55,8%
I don't have a personal relationship (anymore) with most of my 'friends' on Facebook ***	34,4%	35,0%	28,5%	17,3%	21,5%	20,5%	15,7%	25,0%

Social media table 10: Share that (totally) agree with the statements (on a 5-point scale) - split by age group (N=2.164, except where indicated otherwise)
** Filtered by those who have visited at least one social network during the past month (N=1.714)
*** Filtered by those who have a personal Facebook account (N=1.506)

SOCIAL MEDIA: DIGIMETER PROFILES

DISRUPTOR (24,1%)

Disruptors are the biggest users of social media, with LinkedIn as the only exception (more used by Cumulators). Facebook (89%), YouTube (68%) and Instagram (46%) are the most popular social networks for this segment. Disruptors use multiple social media sites, as 65% use at least 3 different social networks per month. One of the reasons for their intensive use of social media is that they fear missing events and updates without social media (47%). 39% agree that they spend too much time on social media, which is the highest share of all segments. This does not mean that they are more occupied by online privacy compared to other segments. Only 48% agree to worrying about the impact of social media on online privacy (Cumulators: 54%), and 73% claim reflecting thoroughly about what content they share with whom on social media (Cumulators: 79%).

CUMULATOR (38,6%)

Cumulators are frequent users of social media platforms, only slightly preceded by Disruptors. Facebook (84%), YouTube (58%), LinkedIn (32%) and Instagram (32%) are the networks that are most likely used on a monthly basis. 57% of Cumulators use at least 3 social networks every month. Just like Disruptors, Cumulators are convinced that they would miss important events and updates without Facebook accounts (46%). 40% claim that messages on social media sometimes trigger them to watch a TV program. Just as with Disruptors, however, there is downside to this story. A substantial portion of Cumulators claim to spend too much time on social media (32%), while a quarter can't imagine spending a day without social media (24%). Moreover, in contrast to Disruptors, Cumulators are well aware of the (possible) impact of social media on their online privacy (54%), while 79% always critically reflect on what content they share on social media with who.

STRUGGLER (10,9%)

Strugglers are not at all unfamiliar with social media, as 88% have used at least one social network within the past month. Most commonly, this is Facebook (71%), with YouTube in second place (51%). However, they are less interested in combining the use of different social networks, as only 29% have used at least 3 social media within the past month (compared to 65% among Disruptors, and 57% among Cumulators).

The majority of Strugglers worry about the impact of social media on their online privacy (56%). However, 32% claim to post even more on social media than ever before. Compared to Disruptors (47%) and Cumulators (46%), they tend to agree less that, without a Facebook account, they miss important events and updates (36%). A quarter of Strugglers think they can't pass a day without social media (25%), while 28% think they spend too much time on social media.

RESISTOR (26,3%)

Social media play a less central role in the lives of Resistors compared to other segments. Only 38% have used at least 1 social network during the past month, most likely Facebook (28%). It may come as no surprise that this segment worries the least that, without a Facebook account, they would miss important events or updates (13%). Only 8% claim to spend too much time on social media, and only 8% can't imagine a day without social media.

Social media (monthly use)

	At least 1 social network	At least 2 social networks	At least 3 social networks
Disruptor	95%	81%	65%
Cumulator	95%	77%	57%
Struggler	88%	57%	29%
Resistor	38%	17%	6%

Social media (monthly use)

	Facebook	Twitter	LinkedIn	YouTube	Google+	Instagram	Pinterest
Disruptor	89%	30%	23%	68%	29%	46%	23%
Cumulator	84%	28%	32%	58%	30%	32%	21%
Struggler	71%	8%	10%	51%	28%	14%	12%
Resistor	28%	3%	6%	12%	10%	1%	2%

Favorite social network *(filtered on who use at least 2 social networks per month)*

	Facebook	Twitter	LinkedIn	YouTube	Google+	Instagram	Pinterest
Disruptor	60%	5%	0%	16%	1%	12%	3%
Cumulator	65%	6%	5%	9%	3%	8%	3%
Struggler	69%	1%	3%	15%	3%	7%	1%
Resistor	63%	1%	4%	13%	12%	1%	6%

Statements (% (totally) agree)

	I am worried that social media violate my privacy	Without a Facebook account you miss a lot of updates and events	Spending too much time on social media *(filtered on who use at least 1 social network per month)*	I can't spend a day without social media *(filtered on who use at least 1 social network per month)*
Disruptor	48%	47%	39%	25%
Cumulator	54%	46%	32%	24%
Struggler	56%	36%	28%	25%
Resistor	49%	13%	8%	8%

Statements (% (totally) agree)

	I am sharing more now on social media than before *(filtered on who use at least 1 social network per month)*	Messages on social media about TV programs can trigger me to watch that program *(filtered on who use at least 1 social network per month)*	I always consciously reflect on what to share on social media with who *(filtered on who use at least 1 social network per month)*	I don't have a personal relationship (anymore) with most of my 'friends' on Facebook *(filtered on who have a personal Facebook account)*
Disruptor	32%	35%	73%	29%
Cumulator	31%	40%	79%	24%
Struggler	32%	34%	73%	24%
Resistor	23%	20%	59%	18%

CHAPTER 06

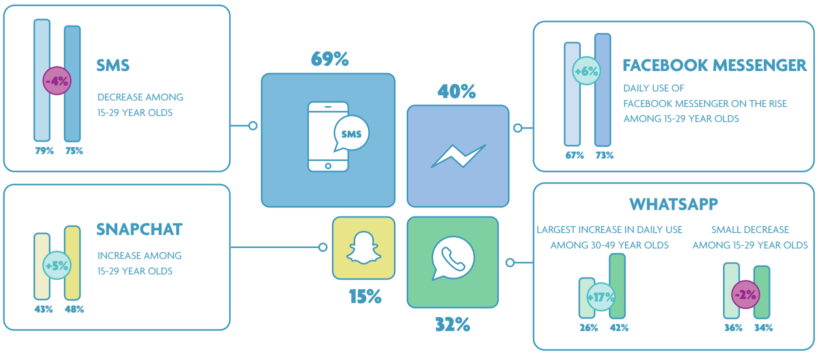
MESSAGING & COMMUNICATION

DIGIMETER INFOGRAPHIC

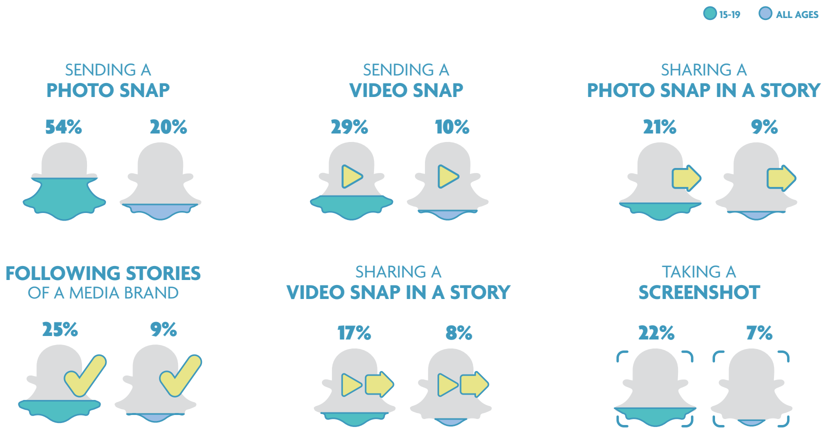
MESSAGING

Remarkable differences between age groups

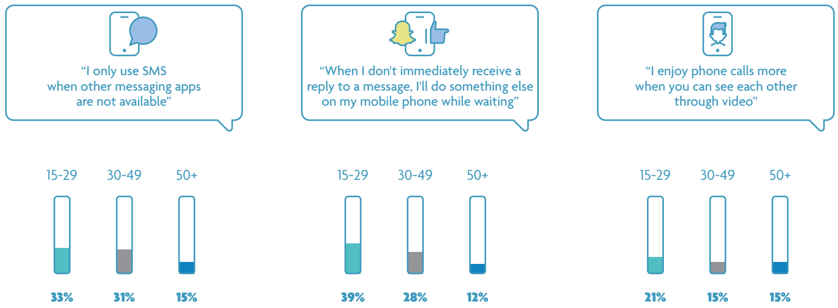
Daily use of messaging apps & SMS:
Remains stable, but age groups vary widely



Snapchat on a daily basis:
Used more intensively by 15-19 year olds vs. older segments



Young users:
Less SMS, more interaction



MESSAGING & COMMUNICATION

USING COMMUNICATION SERVICES & APPLICATIONS

FREQUENCY OF USING COMMUNICATION SERVICES

Across all age groups, the share of Flemings[18] making phone calls on a daily basis is higher for calls through the mobile network (45,0%) than through the landline network (13,2%). The quantity of mobile phone calls made on a daily basis has not changed significantly over the years, except in the case of Flemings aged 50-59 years old (from 47,9% in 2015 to 61,5% in 2016).

Using e-mail as a means of communication is a daily habit for 2 in 3 in the Flemish population (66,4%). However, we do see a remarkable difference among age groups. Only 17,5% of 15-19 year old Flemings report managing their e-mails on a daily basis, while among Flemings older than 30, some 7 to 8 in 10 claim to use e-mail every day.

SMS remains the most popular messaging platform, with 7 in 10 Flemings using SMS on a daily basis. The daily use of SMS remains roughly the same as in 2015, except for Flemings aged 15-19 years old. Within that segment, the share of Flemings using SMS every day has dropped by 11,3 percentage points (from 82,1% in 2015 to 70,8% in 2016). For the first time, SMS is not the message service with the highest degree of daily use within the youngest age segment. There seem to be more 15-19 year olds using Facebook Messenger (80,3%) or Snapchat (74,1%) on a daily basis than SMS (70,8%).

Facebook Messenger and Snapchat use in particular seems to be negatively related with age (the older the age group, the less likely the platform is used on a daily basis). It is worth noting that all results have been filtered by Flemings with access to a smartphone, so this pattern cannot be explained by a difference in smartphone adoption among age groups. WhatsApp, on the other hand, seems to be less frequently used by 15-19 year olds compared to last year (37,0% in 2015 to 21,9% in 2016). The use of WhatsApp seems to be highest among 20-49 year old smartphone owners, with more than half of 30-39 year olds claiming to use WhatsApp every day.

Google Hangouts seems to be losing ground. Shortly after the completion of the digimeter fieldwork, Google launched a new messaging platform called Allo[19]. Because of this timing, Allo could not be integrated into the digimeter questionnaire, so we cannot examine if Allo is used by more Flemings on a daily basis than Hangouts.

Platforms such as Viber, Triing, Telegram[20] and Voxer are reaching a niche audience in Flanders, as only 2% to 11% of the Flemings have ever used one of those apps. Moreover, a substantial share of Flemish smartphone owners have never heard of Viber (36,4%), Triing (37,7%), Telegram (41,7%) or Voxer (49,8%).

18 To be able to compare 2016 figures with 2015 figures for some of the services/applications, the results have been filtered by Flemings with access to a smartphone within the household.

19 https://blog.google/products/allo/google-allo-smarter-messaging-app/

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

FREQUENCY OF USING COMMUNICATION SERVICES (AMONG SMARTPHONE OWNERS)

	Never heard of		Ever		Monthly		Daily	
	2015	2016	2015	2016	2015	2016	2015	2016
Phone call via landline		1,1%		72,7%		48,6%		13,2%
Phone call via mobile network (not internet)		0,5%	93,7%	94,5%	86,6%	85,8%	42,6%	45,0%
E-mail		0,3%		97,0%		91,1%		66,4%
SMS		0,2%	98,4%	97,4%	95,5%	94,5%	70,0%	69,1%
Facebook Messenger		4,2%	70,4%	74,2%*	62,0%	64,7%	39,3%	39,6%
WhatsApp		4,7%	58,6%	66,8%*	49,3%	57,7%*	25,7%	32,1%*
Google Hangouts		29,3%	19,7%	17,1%	10,8%	7,0%*	4,7%	2,3%
Snapchat		14,6%	31,7%	31,8%	25,5%	24,0%	15,3%	14,5%
Skype		6,2%		54,9%		21,4%		3,5%
Facetime		16,3%		32,5%		15,1%		2,4%
Viber		36,4%		8,4%		2,9%		0,9%
Triing		37,7%		10,9%		4,5%		0,7%
Telegram (online message service)		41,7%		4,6%		2,5%		1,3%
Voxer		49,8%		2,7%		1,1%		0,3%

Messaging table 1: 'How often do you use the following communication services and applications?' (of people owning a smartphone, N=1.599)
* Statistically significant change compared to the previous year, based on a chi-square test.

DAILY USE OF COMMUNICATION SERVICES (AMONG SMARTPHONE OWNERS) - SPLIT BY AGE GROUP

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Phone call via landline	9,2%	5,9%	6,6%	14,8%	13,7%	19,7%	33,2%	13,2%
Phone call via mobile network (not internet)	22,2%	28,0%	45,9%	53,4%	61,5%	40,4%	47,3%	45,0%
E-mail	17,5%	54,7%	75,7%	81,1%	71,8%	68,5%	70,5%	66,4%
SMS	70,8%	77,8%	70,1%	77,2%	67,3%	44,7%	53,8%	69,1%
Facebook Messenger	80,3%	69,6%	44,0%	30,8%	23,0%	15,0%	9,1%	39,6%
WhatsApp	21,9%	39,3%	54,6%	30,1%	21,2%	24,0%	15,8%	32,1%
Google Hangouts	4,1%	4,1%	2,7%	1,8%	1,8%	0,0%	0,5%	2,3%
Snapchat	74,1%	36,2%	6,5%	2,2%	0,9%	1,7%	0,0%	14,5%
Skype	3,6%	3,3%	4,1%	2,4%	2,8%	2,9%	5,5%	3,5%
Facetime	4,0%	2,4%	4,2%	1,5%	1,3%	1,7%	2,0%	2,4%
Viber	0,3%	1,2%	1,3%	0,3%	0,0%	1,7%	2,5%	0,9%
Triing	0,4%	0,5%	0,2%	1,8%	0,2%	1,7%	0,5%	0,7%
Telegram (online message service)	0,0%	2,3%	2,5%	0,2%	1,1%	1,7%	0,5%	1,3%
Voxer	2,2%	0,2%	0,0%	0,0%	0,0%	1,7%	0,0%	0,3%

Messaging table 2: 'How often do you use the following communication services and applications?' (% daily use) - split by age group (of people owning a smartphone, N=1.599)

EVOLUTION IN DAILY USE OF COMMUNICATION SERVICES (AMONG SMARTPHONE OWNERS) - SPLIT BY AGE GROUP

	Phone call via mobile network (not internet)		SMS		Facebook Messenger	
	2015	2016	2015	2016	2015	2016
15-19	26,4%	22,2%	82,1%	70,8%*	78,5%	80,3%
20-29	28,0%	28,0%	78,5%	77,8%	61,5%	69,6%*
30-39	45,1%	45,9%	64,4%	70,1%	39,3%	44,0%
40-49	55,6%	53,4%	82,1%	77,2%	33,5%	30,8%
50-59	47,9%	61,5%*	64,7%	67,3%	21,1%	23,0%
60-64	41,8%	40,4%	48,3%	44,7%	13,2%	15,0%
65+	49,1%	47,3%	53,3%	53,8%	7,1%	9,1%
Total	42,6%	45,0%	70,0%	69,1%	39,3%	39,6%

	WhatsApp		Google Hangouts		Snapchat	
	2015	2016	2015	2016	2015	2016
15-19	37,0%	21,9%*	7,9%	4,1%	66,5%	74,1%
20-29	36,4%	39,3%	7,5%	4,1%	32,1%	36,2%
30-39	30,6%	54,6%*	6,1%	2,7%*	7,1%	6,5%
40-49	20,6%	30,1%*	3,2%	1,8%	4,1%	2,2%
50-59	18,5%	21,2%	2,6%	1,8%	1,5%	0,9%
60-64	10,5%	24,0%*	2,6%	0,0%	0,0%	1,7%
65+	11,3%	15,8%	0,0%	0,5%	0,0%	0,0%
Total	25,7%	32,1%*	4,7%	2,3%*	15,3%	14,5%

Messaging table 3: 'How often do you use the following communication services and applications?' (% daily use, 2015 vs. 2016) - split by age group (of people owning a smartphone, N=1.599)
* Statistically significant change compared to the previous year, based on a chi-square test.

ACTIVITIES ON MESSAGING PLATFORMS

Facebook Messenger and Whatsapp started off as text messaging platforms, gradually adding the possibility of making voice calls with other users. The main feature of Skype and Facetime is (video) voice calls, with text messaging as an add-on feature. This distinction is still clear when looking at the activities performed on each platform.

Facebook Messenger and Whatsapp are still mainly about sending text messages. Other activities such as sending photos, sharing videos or making phone calls are slightly more popular on WhatsApp than on Facebook Messenger. 3 in 10 Flemish WhatsApp users claim to make phone calls via WhatsApp on a monthly basis.

Skype and Facetime, on the other hand, are mainly used to make voice calls. This is complemented with text messaging (chatting) for 31,7% of Skype users and 14,6% of Facetime users. Sending photos or videos is done on a monthly basis by about 1 in 10 Skype or Facetime users.

Almost half of Snapchat users claim to send a photo at least once per month (48,8%). For 1 in 5 users, this is a daily practice (20,2%). Sharing videos is a less common practice. 6 in 10 Snapchat users have ever sent a video (59,7%), 38,4% do this on a monthly basis, and for 10,4%, this is a daily practice. Over 1 in 3 Flemish Snapchat users share a photo through Stories on a monthly basis (36,2%); for videos this is 30,5%. A quarter of Snapchat users state checking Snaps posted by media brands (e.g. Studio Brussel, Buzzfeed, etc.) at least once per month (25,2%). Over half of the Snapchat users in Flanders have ever taken a screenshot of a Snap they've received (52,7%). For 7,1%, taking a screenshot is a daily practice.

It is clear that Snapchat is still a stronghold for the youngest generations. As mentioned earlier in this chapter, Snapchat is a daily routine for 74,1% of the 15-19 year old smartphone owners in Flanders, while in the total Flemish smartphone-owning population, this is only 14,5%. Among Flemings that have ever used Snapchat, it appears that the youngest segment (15-19 years old) are the most intense users of Snapchat. Over half of them send a photo via Snapchat every day (53,6%, compared to 20,2% among all Snapchat users). A quarter of the 15-19 year old Snapchat users state following at least one account or Story of a media brand (25,2%, compared to 9,0% of the total Snapchat user base). And over 1 in 5 Snapchat users aged 15-19 years old claim to take screenshots of received photos on a daily basis (22,3%, compared to 7,1% within all Snapchat users).

MONTHLY ACTIVITIES ON SELECTED COMMUNICATION PLATFORMS

	Making phone calls	Text messaging/ chatting	Sending photos	Sending videos	None of these
Facebook Messenger (N=1.125)	22,7%	88,6%	61,3%	28,5%	5,5%
WhatsApp (N=960)	29,5%	89,6%	74,3%	30,8%	3,0%
Google Hangouts (N=134)	17,3%	61,2%	29,1%	7,4%	19,4%
Skype (N=397)	77,4%	31,7%	12,8%	9,8%	8,0%
Facetime (N=264)	72,9%	14,6%	8,4%	10,0%	10,5%

Messaging table 4: 'How have you used the following communication platforms during the past month?' (of people using the specific platform on a monthly basis)

FREQUENCY OF ACTIVITIES ON SNAPCHAT

	Ever	Monthly	Daily
Sending a photo-snap	69,3%	48,8%	20,2%
Sending a video-snap	59,7%	38,4%	10,4%
Sharing a photo-snap in a story	54,7%	36,2%	9,0%
Following stories or snaps of a media brand (e.g. Studio Brussel, CNN, Buzzfeed,…)	42,9%	25,2%	9,0%
Sharing a video-snap in a story	52,6%	30,5%	7,5%
Taking a screenshot	52,7%	29,2%	7,1%

Messaging table 5: 'How often do you engage in the following activities on Snapchat?' (of people that have ever used Snapchat, N=700)

ACTIVITIES DONE ON SNAPCHAT ON A DAILY BASIS - SPLIT BY AGE GROUP

	15-19	20-29	30-39	40-49	50-59**	60-64**	65+**	Total
Sending a photo-snap	53,6%	29,9%	8,2%	4,1%				20,2%
Sending a video-snap	28,6%	13,2%	5,2%	3,6%				10,4%
Sharing a photo-snap in a story	20,6%	12,8%	5,4%	3,6%				9,0%
Following stories or snaps of a media brand (e.g. Studio Brussel, CNN, Buzzfeed,…)	25,2%	11,1%	3,7%	5,8%				9,0%
Sharing a video-snap in a story	16,7%	10,1%	5,2%	3,6%				7,5%
Taking a screenshot	22,3%	5,8%	4,0%	4,8%				7,1%

Messaging table 6: 'How often do you engage in the following activities on Snapchat?' (% on daily basis) - split by age group
(of people that have ever used Snapchat, N=700)
** Sample size too low to make assumptions

OPINION ON MESSAGING

A quarter of the Flemish population claims to only use SMS when other messaging apps are not available (e.g., due to lack of internet connection, or because the receiver only uses SMS) (23,5%). This seems especially true for Flemings younger than 39 years old.

A third of the population can imagine that within 5 years they will have switched completely from SMS to internet-based messaging apps such as Facebook Messenger and WhatsApp (32,8%). Surprisingly, it is not within the youngest age segment that this belief is most widespread. In fact, it seems that 30-39 year old Flemings particularly agree with this statement (48,9%, compared to 32,8% of the total population, and 23,9% among 15-19 year olds).

When they don't immediately receive a reply, a fifth of Flemings state doing something else on their smartphone while waiting (e.g. checking Facebook, playing a game) instead of putting away their mobile phone (22,8%). This is a common practice for a substantial part of the 15-19 year olds, as 46,2% of them agree with this statement.

Web applications like Skype and Facetime allow users to make video calls. So instead of only hearing each other, you can see who you are speaking with through video. Only 16,0% of the Flemish population claims that they enjoy video calls more than traditional phone calls. There are no remarkable differences between age segments concerning this topic. The youngest generation (15-19 years old) seems to agree the most with this statement (24,1%).

In practice, Snapchat remains a platform for young people. However, only a quarter of 15-19 year old Flemings thinks that Snapchat is only intended for youngsters (25,1%). Among the other age groups, 10% to 20% agree with this statement. So, in that respect, Flemings seem not to rule out the idea that one day Snapchat will become a more common messaging app within older age groups.

OPINION ON MESSAGING

	(Totally) disagree	Neutral	(Totally) agree
I only use SMS when other messaging apps are not available	53,3%	23,2%	23,5%
I can imagine that I won't be using SMS anymore within 5 years	38,0%	29,2%	32,8%
When I don't immediately receive a reply to a message, I'll do something else on my mobile phone while waiting	49,0%	28,2%	22,8%
I enjoy phone calls more when you can see each other through video	45,1%	38,9%	16,0%
Snapchat is only intended for youngsters	28,9%	54,1%	17,0%

Messaging table 7: 'To what extent do you agree with the following statements?' (on a 5-point scale) (N=2.164)

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

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

Messaging table 8: Share (totally) agree with the statements (on a 5-point scale) - split by age group (N=2.164)

MESSAGING & COMMUNICATION: DIGIMETER PROFILES

DISRUPTOR (24,1%)

Disruptors show the lowest daily use of phone calls (both via landline as via mobile network). Compared to Cumulators, daily use of e-mail (58%, compared to 77% among Cumulators) and SMS (69%, compared to 74% among Cumulators) is also less common. Messaging apps such as Facebook Messenger (51%), WhatsApp (35%) and Snapchat (24%), on the other hand, are more popular means of daily communication compared to other segments. Of all segments, they agree the most to avoiding the use of SMS unless the use of other messaging apps is not possible (36%). 39% agree that within 5 years, they won't be using SMS at all. Moreover, Disruptors admit more often than other profiles that they use other apps (e.g. visiting social media, playing games, etc.) while waiting for a response to a message they have sent instead of putting the smartphone away (34%). This process could result in the fact that Disruptors experience the highest degree of dependency on the smartphone (see further on).

CUMULATOR (38,6%)

Over half of Cumulators make a mobile phone call every day (52%). This rate is higher than that of any other profile. Moreover, managing e-mails (77%) and sending SMS messages (74%) are more commonly daily habits than within any other segment. These more traditional forms of (online/mobile) communication are supplemented with the use of messaging apps. Facebook Messenger (38%) and WhatsApp (34%) are popular within this segment. Cumulators are less likely to use Snapchat on a daily basis (10%). Although they seem to use messaging apps on top of SMS, 40% think that they won't be using SMS in the future due to the increased usage of messaging apps. 27% state only using SMS when the use of other messaging apps is not possible.

STRUGGLER (10,9%)

About a quarter of Strugglers make phone calls every day through a landline connection (24%), which is higher than among any other segment. They seem to be less likely to manage their e-mails on a daily basis (48%, compared to 58% among the Disruptors and 77% among Cumulators). 61% state using SMS every day. With 32% using Facebook Messenger and 24% using WhatsApp on a daily basis, these messaging apps reach a substantial user base within this segment (albeit at a lower level compared to Disruptors (51% and 35%, respectively) and to Cumulators (38% and 34%, respectively)). The relatively high use of Snapchat is remarkable (22%, which is at the same level as among Disruptors (24%)). This is due to the presence of the subgroup of young Flemings in this segment, enhanced by the fact that these results are filtered by who owns a smartphone (which is also related to age).

16% of the Strugglers claim to only use SMS when other messaging apps are not applicable. This figure is significantly lower compared to Disruptors (36%) and Cumulators (27%). Furthermore, only 28% agree that they could imagine stopping using SMS in favor of messaging apps within the next 5 years (compared to 39% among Disruptors and 40% among Cumulators).

RESISTOR (26,3%)

16% of Resistors make phone calls through a landline connection on a daily basis, while 42% make calls via the mobile network every day. These figures are in line with the average within the total population (13% and 45%, respectively).

Almost half of Resistors owning a smartphone claim to manage their e-mails (47%) or to use SMS (46%) on a daily basis. Messaging apps are far less popular within this segment, except for WhatsApp, with 21% using this service on a daily basis.

Resistors are less convinced than other segments that messaging apps will have replaced the SMS service within 5 years (18%).

Communication services on a daily basis *(filtered on who has a smartphone)*

	Phone call via landline	Phone call via mobile network	E-mail	SMS
Disruptor	7%	36%	58%	69%
Cumulator	15%	52%	77%	74%
Struggler	24%	43%	48%	61%
Resistor	16%	42%	47%	46%

Communication services on a daily basis *(filtered on who has a smartphone)*

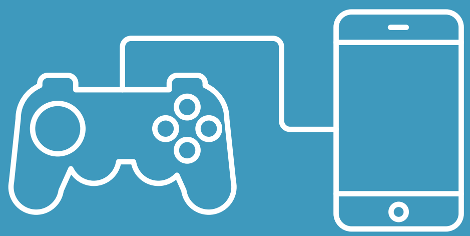
	Facebook Messenger	WhatsApp	Google Hangouts	Snapchat	iMessage
Disruptor	51%	35%	3%	24%	20%
Cumulator	38%	34%	2%	10%	15%
Struggler	32%	24%	3%	22%	7%
Resistor	11%	21%	0%	1%	2%

Statements (% (totally) agree)

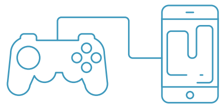
	I only use SMS when other messaging apps are not available	I can imagine that I won't be using SMS anymore within 5 years	When I don't immediately receive a reply to a message, I'll do something else on my mobile phone while waiting	I enjoy phone calls more when you can see each other through video	Snapchat is only intended for youngsters
Disruptor	36%	39%	34%	20%	17%
Cumulator	27%	40%	29%	16%	19%
Struggler	16%	28%	19%	20%	22%
Resistor	11%	18%	6%	12%	12%

CHAPTER 07

GAMING



DIGIMETER INFOGRAPHIC

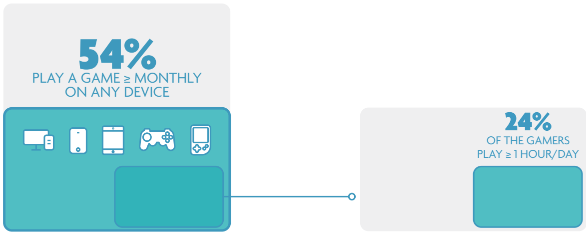


GAMING

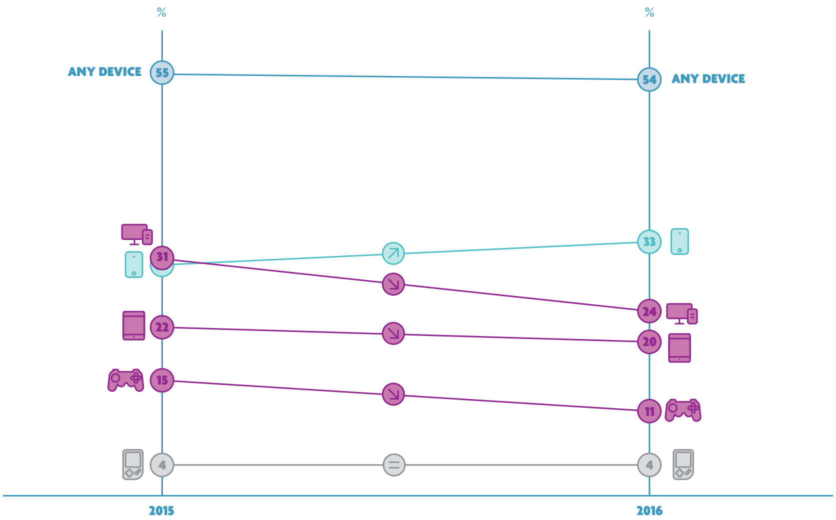
Mobile gaming takes first place

Gaming frequency:

More than half of the population plays at least once a month

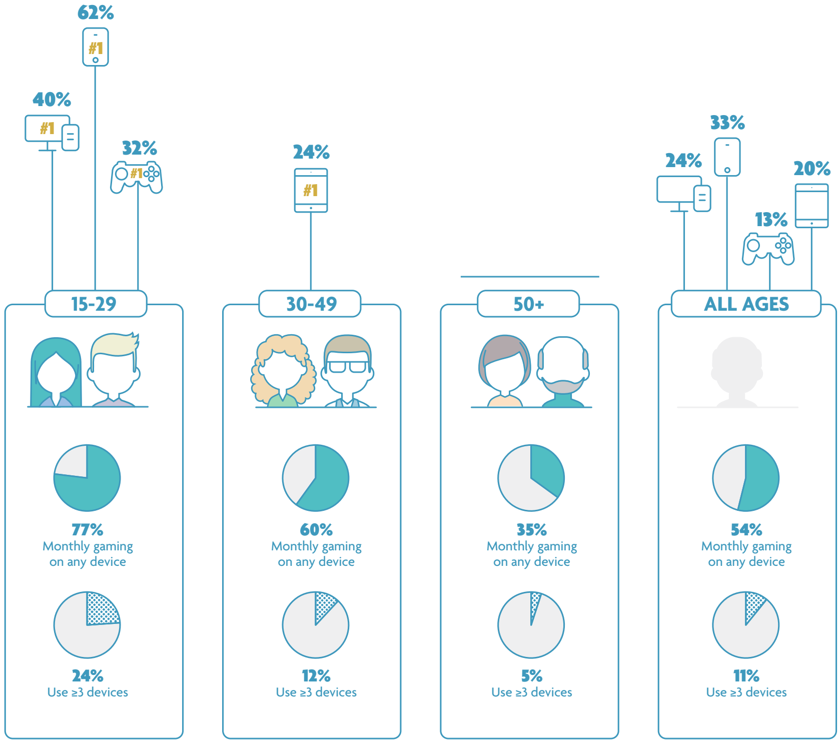


Mobile phone becomes the #1 gaming device



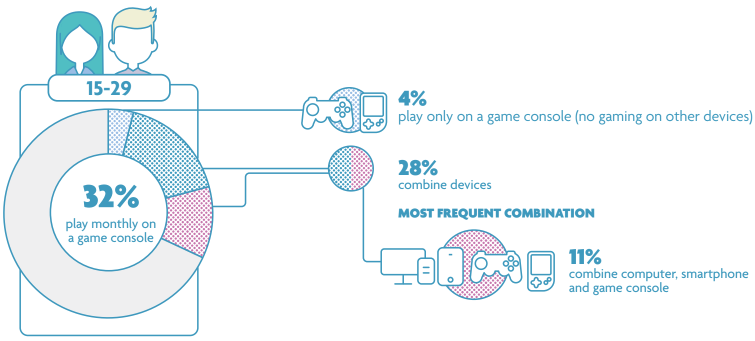
Gaming devices by age segment

Youngsters most frequent gamers on any device, except tablet



Youngsters

One third plays monthly on a portable or fixed console



GAMING

GAMING DEVICES

DEVICES USED FOR GAMING

Over half of the Flemish population reports playing digital games at least once per month on any device (53,9%), which is not a statistically significant change compared to 2015. Gaming is still more prevalent with the younger generations. 81,0% of 15-19 year olds indicate having played video games during the past month on any device. But even in the oldest generations, at least 1 in 3 claim to have played video games on any device within the past month. Playing video games is still slightly more common among men (56,5%) than among women (51,3%).

The mobile phone has overtaken the computer as most common gaming device. 1 in 3 Flemings played a game on a mobile phone during the last month (33,2%), which is a significant increase compared to 2015 (30,4%). Playing games on a mobile phone is most habitual among 15-19 year old Flemings, as 2 in 3 have played a game on a mobile phone within the past month (65,7%). The mobile phone is, both among men and women, the most commonly used device for gaming. However, the percentage of people who have played a game on a mobile phone within the past month is higher among men (36,1%) than among women (30,5%).

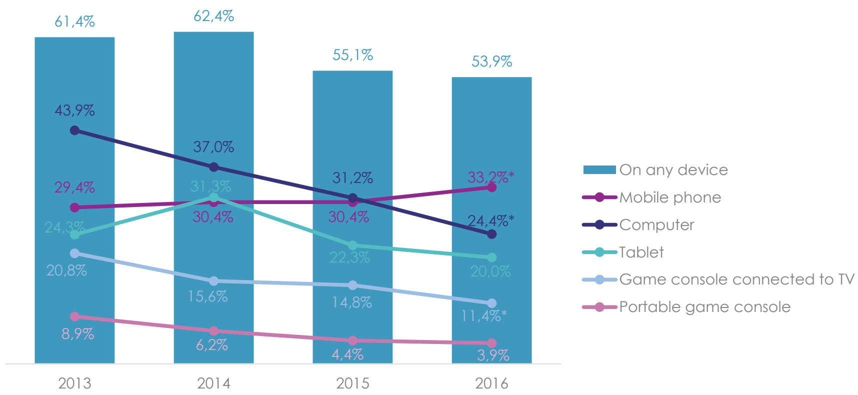
The use of a computer to play games is decreasing year by year. A quarter of Flemings reports to have played video games on a laptop or a desktop computer during the past month (24,4%), a significant drop compared to 2015 (31,2%). Playing games on a computer is more common among 15-29 year old Flemings, with about 4 in 10 having played a game on a computer during the past month. There is still a distinct difference between men and women on this point. 30,9% of Flemish men have played a game on a computer within the last month, compared to only 18,1% of Flemish women.

The tablet is used as a gaming device for 1 in 5 Flemings (20,0%), which is no significant change compared to last year (22,3%). Age and gender are no differentiators in the extent to which playing games on a tablet is a common practice.

Playing games on a game console connected to a TV seems to lose ground compared to the previous years. In 2016, 11,4% of the Flemish population played a game on a game console at least once per month. The year before, this figure was 14,8%, and in 2013 it was 20,8%. Game consoles are mainly popular within the younger age segments (15-29 years old) and among men.

Gaming on a portable game console remains an activity for a niche audience, as only 3,9% of the Flemish population has played a game on a portable game console. In particular, the youngest age group (15-19 years old) more often plays games on this type of device (15,8%). The percentage of Flemings that have played a game on a portable game console is slightly higher among men (5,2%) than among women (2,6%).

DEVICES USED FOR GAMING



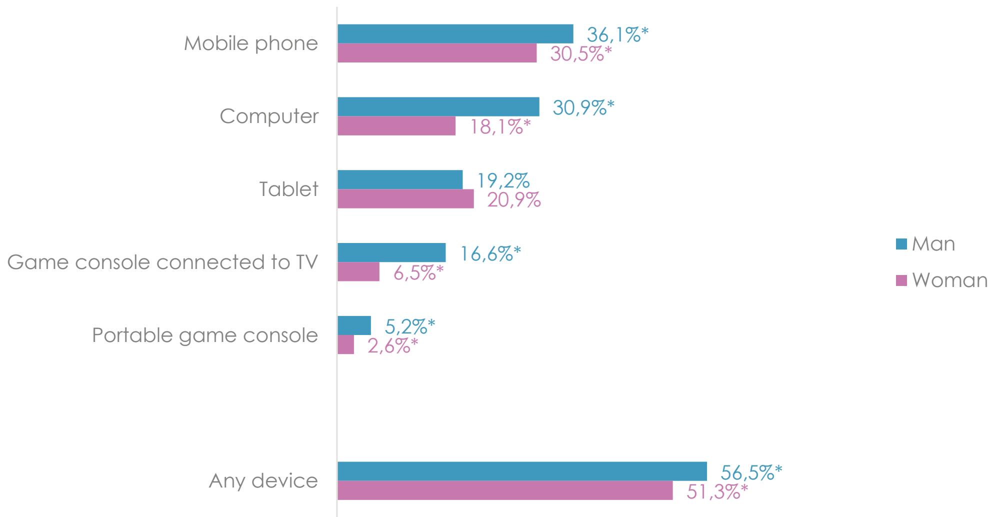
Gaming graph 1: 'On which devices have you played a digital game during the past month?' (N=2.164)

DEVICES USED FOR GAMING - SPLIT BY AGE GROUP

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

Gaming table 1: 'On which devices have you played a digital game during the past month?' - split by age group (N=2.164)

DEVICES USED FOR GAMING - SPLIT BY GENDER



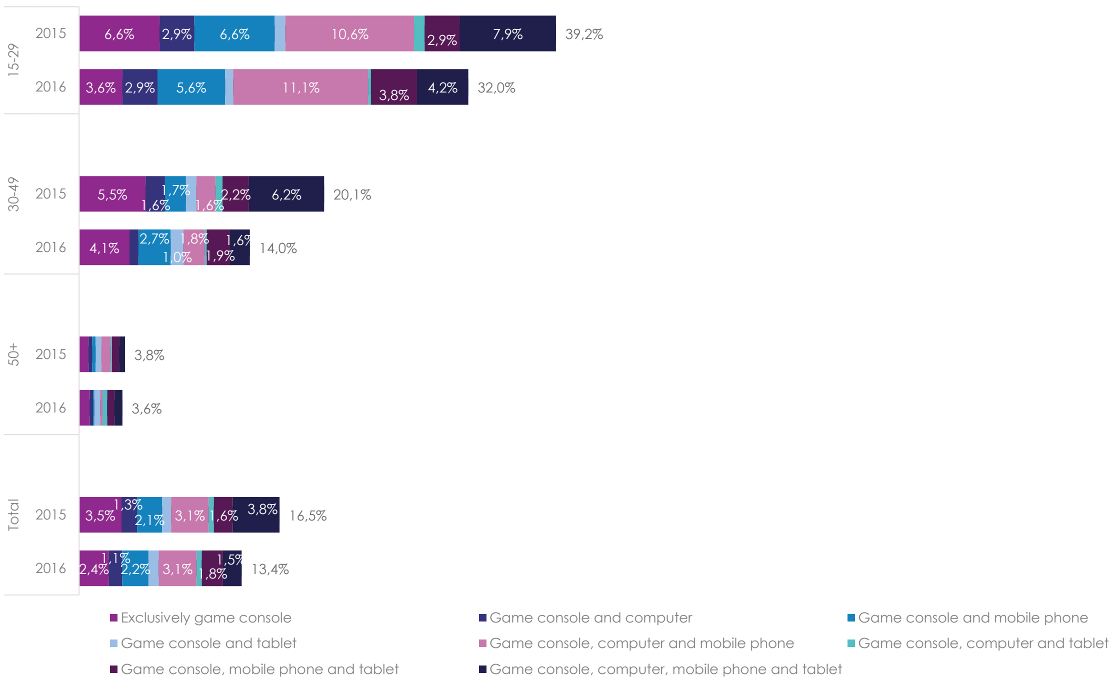
Gaming graph 2: 'On which devices have you played a digital game during the past month?' - split by gender (N=2.164)
* Statistically significant difference between men and women, based on a chi-square test.

COMBINATIONS OF DEVICES USED FOR GAMING

Gaming through game consoles, both portable and connected to a TV, is slightly less common compared to last year (a decrease from 16,5% in 2015 to 13,4% in 2016). 32,0% of the 15-29 year old Flemings play games on a game console on a monthly basis (a drop of 7,2 percentage points compared to last year). Remarkably, only 3,6% of the 15-29 year old Flemings use the game console as the single device to play games. This means that the other 28,4% (3,6% + 28,4% = 32,0%) is combining gaming on a game console with gaming on at least one other device. The most common combination is game consoles, computers and mobile phones (11,1%).

As we saw earlier on in this chapter, the mobile phone is the only gaming device that in comparison to last year is showing an increase in usage for playing games on a monthly basis (from 30,4% in 2015 to 33,2% in 2016). Even more remarkable is the fact that for an increasing amount of Flemings the mobile phone is the exclusive device used for gaming on a monthly basis (from 6,9% in 2015 to 11,2% in 2016). Among the youngest age group (15-29 years old) 17,3% only play games on a mobile phone on a monthly basis, an increase of 6,5 percentage points compared to last year. In that perspective, it is no surprise that Nintendo has launched Super Mario Run on mobile, this being the first time that the popular gaming franchise is available on other devices than Nintendo consoles[21].

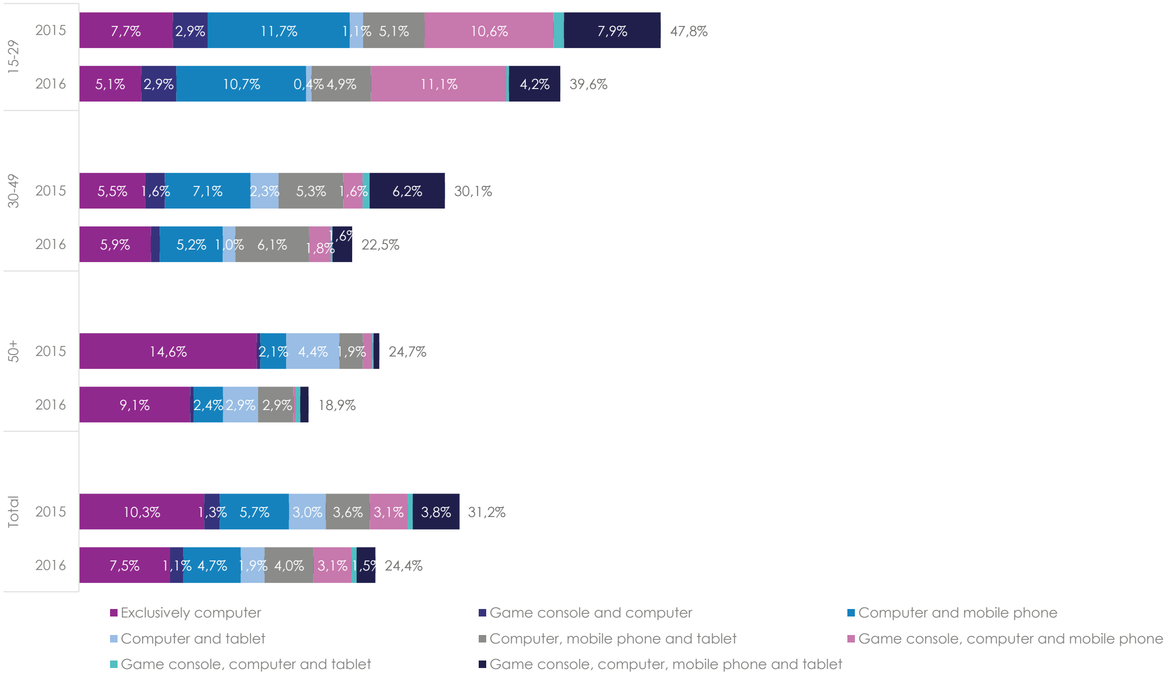
GAME CONSOLE USED FOR GAMING: SINGLE DEVICE VS. IN COMBINATION WITH OTHER DEVICES ON A MONTHLY BASIS - SPLIT BY AGE GROUP



Gaming graph 3: Game console used for gaming: single device vs. in combination with other devices on a monthly basis - split by age group (N=2.164). Note: to enhance readability of the graph, value labels of less than 1,0% have been omitted.

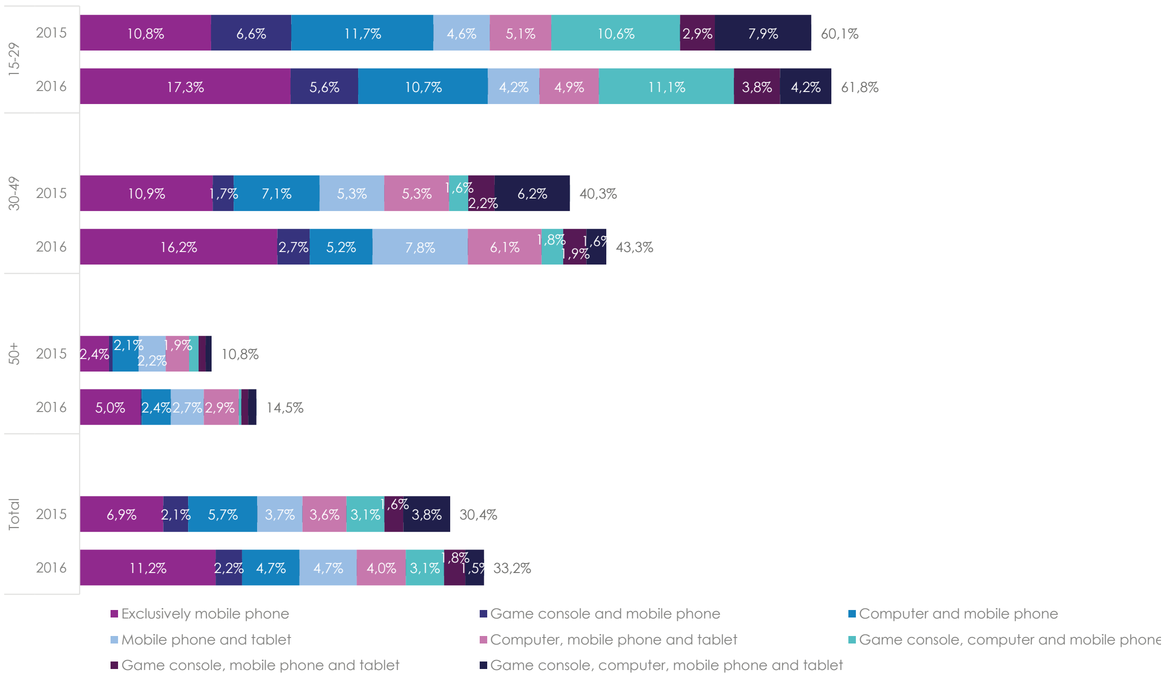
21 Source: https://www.bloomberg.com/news/articles/2016-09-07/nintendo-soars-as-super-mario-mobile-game-comes-to-the-iphone

COMPUTER USED FOR GAMING: SINGLE DEVICE VS. IN COMBINATION WITH OTHER DEVICES ON A MONTHLY BASIS - SPLIT BY AGE GROUP



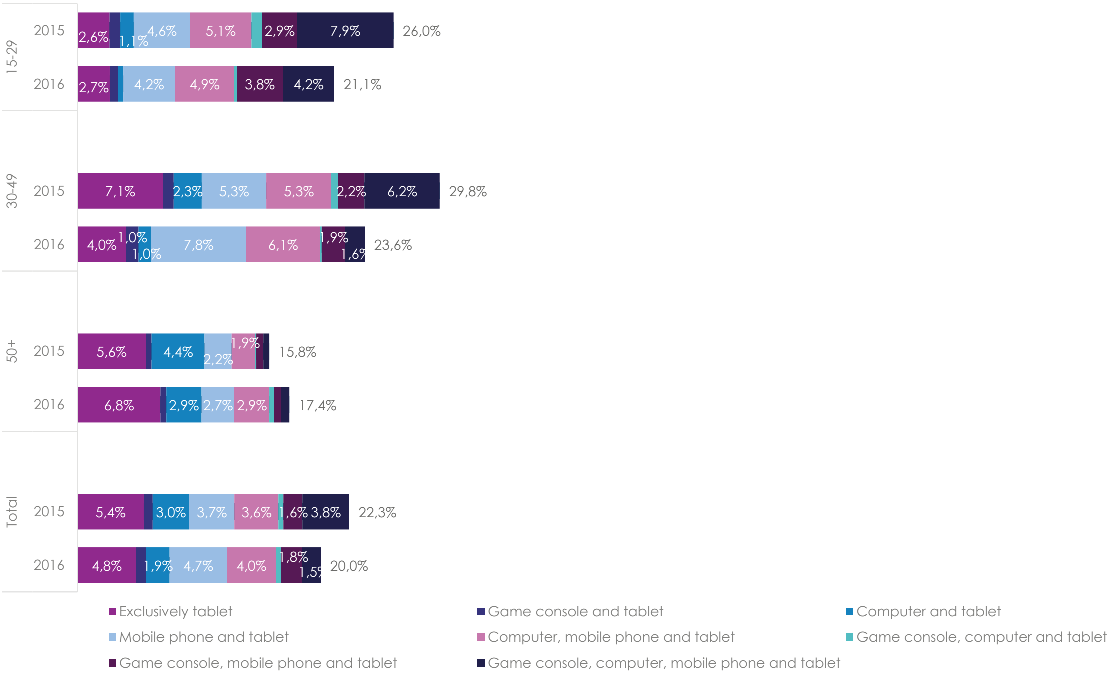
Gaming graph 4: Computer used for gaming: single device vs. in combination with other devices on a monthly basis - split by age group (N=2.164).
Note: to enhance readability of the graph, value labels of less than 1,0% have been omitted.

MOBILE PHONE USED FOR GAMING: SINGLE DEVICE VS. IN COMBINATION WITH OTHER DEVICES ON A MONTHLY BASIS - SPLIT BY AGE GROUP



Gaming graph 5: Mobile phone used for gaming: single device vs. in combination with other devices on a monthly basis - split by age group (N=2.164).
Note: to enhance readability of the graph, value labels of less than 1,0% have been omitted.

TABLET USED FOR GAMING: SINGLE DEVICE VS. IN COMBINATION WITH OTHER DEVICES ON A MONTHLY BASIS - SPLIT BY AGE GROUP

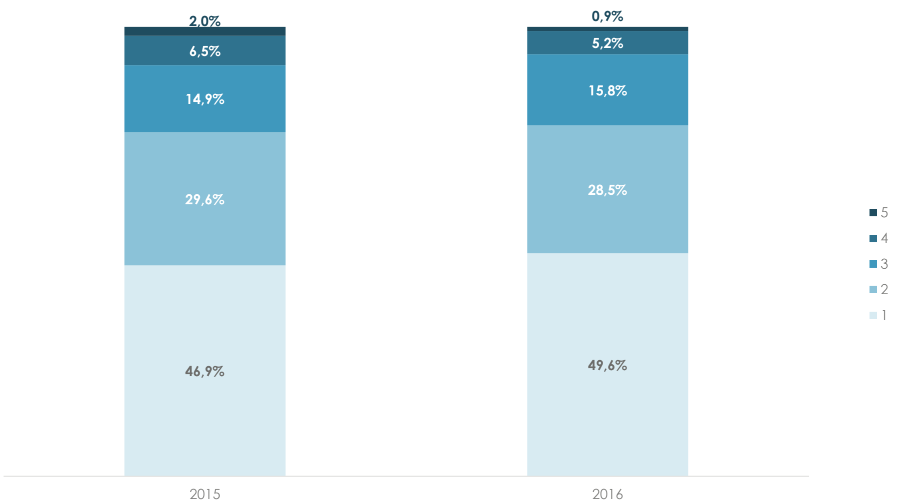


Gaming graph 6: Tablet used for gaming: single device vs. in combination with other devices on a monthly basis - split by age group (N=2.164).
Note: to enhance readability of the graph, value labels of less than 1,0% have been omitted.

NUMBER OF DEVICES USED FOR GAMING

There is no significant shift in the number of different types of devices used for gaming on a monthly basis. About half of Flemish gamers state to have played games on only one device (49,6%), while 3 in 10 gamers tend to use two types of devices (28,5%). Over 1 in 5 have played games on at least 3 different types of devices during the past month (21,9%).

NUMBER OF DEVICES USED FOR GAMING

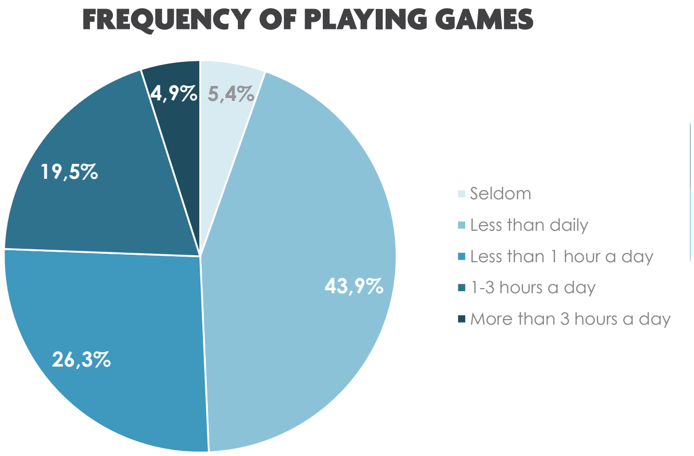


Gaming graph 7: 'On which devices have you played a digital game during the past month?' - count (of those playing games in the past month, N=1.122)
* Statistically significant change compared to the previous year, based on a chi-square test.

GAMING FREQUENCY

FREQUENCY OF PLAYING GAMES

Half of Flemish gamers report not gaming on a daily basis (5,4% seldom game, and 43,9% game less than daily). A quarter of the gamers in Flanders claim to game on a daily basis, but for less than 1 hour per day (26,3%). Another quarter of Flemish gamers can be called 'frequent gamers', as they report gaming for at least 1 hour a day (24,4%, with 19,5% gaming for between 1 and 3 hours a day, and 4,9% gaming for more than 3 hours a day).

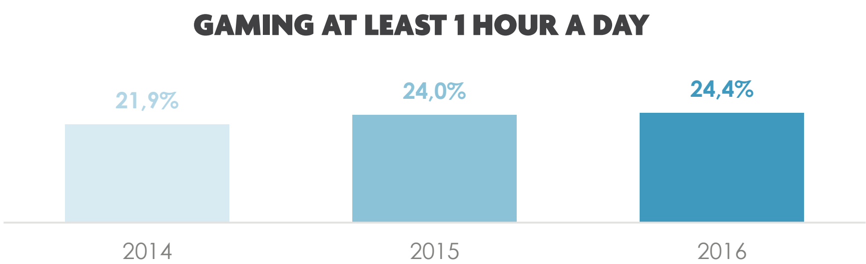


Gaming graph 8: 'How often do you play video games?' (of those playing games in the past month, N=1.122)

FREQUENT GAMERS

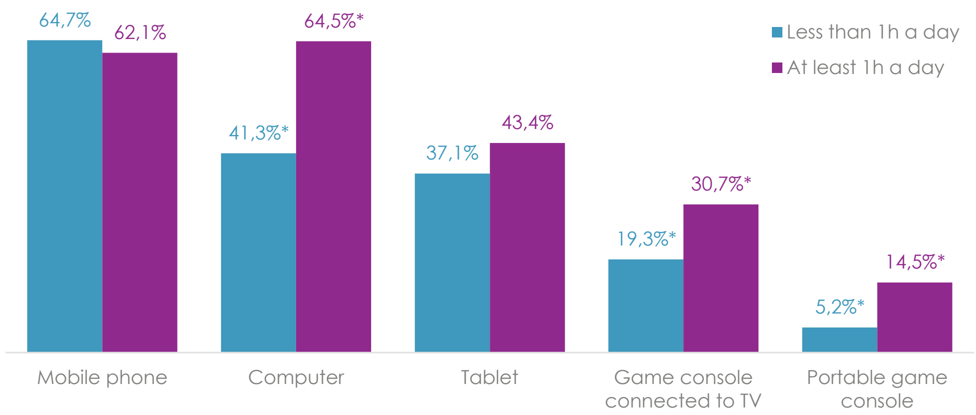
The share of 'frequent gamers ' (i.e., gamers who game for at least 1 hour a day) remains stable at about a quarter of the total group of Flemish gamers (24,4%). Frequent gamers tend to prefer gaming on a computer (64,5%, compared to 41,3% of less frequent gamers), a game console connected to a TV (30,7%, compared to 19,3% of less frequent gamers) or a portable game console (14,5%, compared to 5,2% of less frequent gamers). The use of a mobile phone or a tablet seems to not differ significantly between both types of gamers. Note that within the frequent gamers group, the computer is still slightly more preferred as a gaming platform (64,5%) than the mobile phone (62,1%).

Frequent gamers tend to use a more varied mix of devices to play games on compared to the gamers who play games less regularly. Over half of the gamers who play for less than 1 hour a day state only using 1 device on a monthly basis to play games on (54,4%). Among frequent gamers, this is only 1 in 3 (34,8%). Moreover, 35,8% of frequent gamers play on at least 3 different types of devices, while this is only true for 17,4% of the gamers who play less frequently.



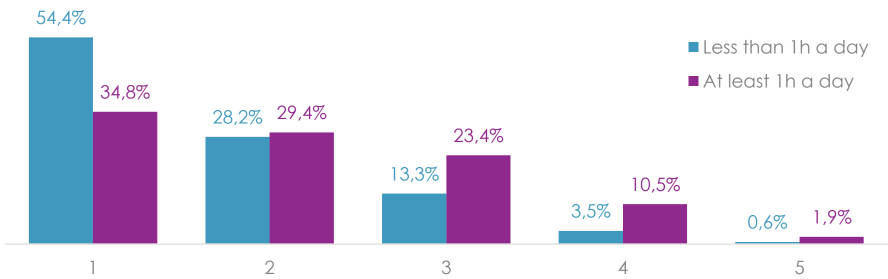
Gaming graph 9: 'How often do you play video games?' - % at least 1 hour a day (of those playing games in the past month, N=1.122)
* Statistically significant change compared to the previous year, based on a chi-square test.

DEVICES USED FOR GAMING - SPLIT BY GAMING FREQUENCY



Gaming graph 10: 'On which devices have you played a digital game during the past month?' - split by gaming less than 1 hour per day vs. gaming at least 1 hour per day (of those playing games in the past month, N=1.122)

NUMBER OF DEVICES USED FOR GAMING - SPLIT BY GAMING FREQUENCY



Gaming graph 11: Count of 'On which devices have you played a digital game during the past month?' - split by gaming less than 1 hour per day vs. gaming at least 1 hour per day (of those playing games in the past month, N=1.122)

GAMING: DIGIMETER PROFILES

DISRUPTOR (24,1%)

Gaming is a popular activity among Disruptors. 83% have played a game on at least one device during the past month. Most popular devices for gaming are the smartphone (58%) and the computer (40%). Compared to the other segments, Disruptors show higher use rates of gaming consoles connected to the TV (24%) and portable game consoles (9%). 37% of Disruptors play games for at least 1 hour a day, which is the largest proportion of all segments.

CUMULATOR (38,6%)

Although over half of Cumulators state playing digital games at least once per month (52%), this rate is clearly lower than that of Disruptors (83%) or even Strugglers (75%). If they do play games, this is most likely done on the smartphone (38%). Only 13% of the Cumulators who claim to play games on a monthly basis claim to play at least 1 hour per day. This is only slightly more than among Resistors (8%), and far less than among Disruptors (37%) and Strugglers (31%).

STRUGGLER (10,9%)

Strugglers like to play videogames. 75% play a digital game at least once per month on any device, and 31% play for at least 1 hour per day. These figures are only preceded by those of Disruptors (83% and 37%, respectively). Most commonly, Strugglers play games on a computer (40%). Typical for this segment though is the high use rate of tablets for gaming purposes (37%), which is clearly higher than among Disruptors (25%) and Cumulators (24%).

RESISTOR (26,3%)

Only 22% of Resistors claim to play videogames on a monthly basis, which is far less than any other segment. Moreover, the gamers within this segment tend to be more casual players. Only 8% of the Traditional Media Players who play a digital game on a monthly basis, do so for at least 1 hour a day (compared to 24% among the gamers within the total Flemish population).

Devices used for gaming (monthly basis)

	Game console connected to TV	Portable game console	Computer	Mobile phone	Tablet	Any device	Used at least 2 devices
Disruptor	24%	9%	40%	58%	25%	83%	46%
Cumulator	11%	3%	22%	38%	24%	52%	29%
Struggler	10%	4%	40%	31%	37%	75%	31%
Resistor	2%	1%	7%	4%	3%	22%	2%

Time spent on gaming per day *(filtered on who play games at least once per month)*

	At least 1 hour a day
Disruptor	37%
Cumulator	13%
Struggler	31%
Resistor	8%

CHAPTER 08

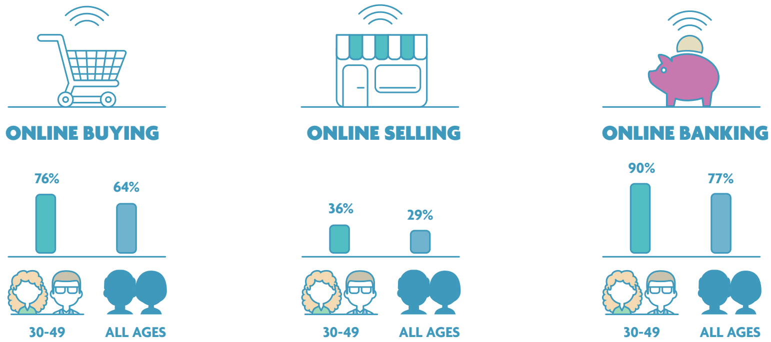
GENERAL MEDIA

DIGIMETER INFOGRAPHIC

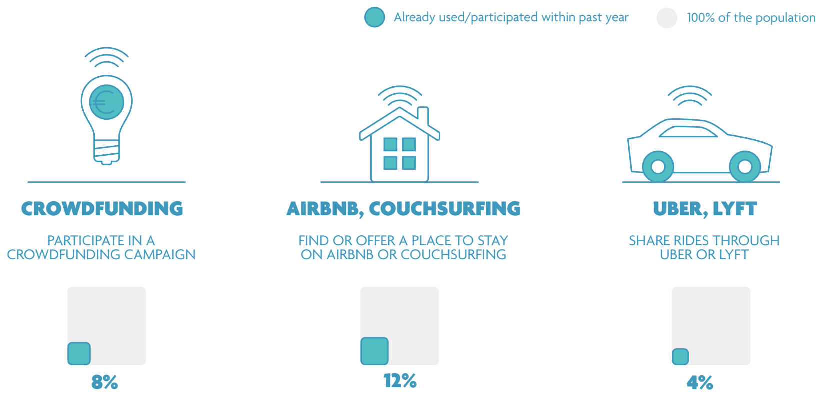
GENERAL MEDIA

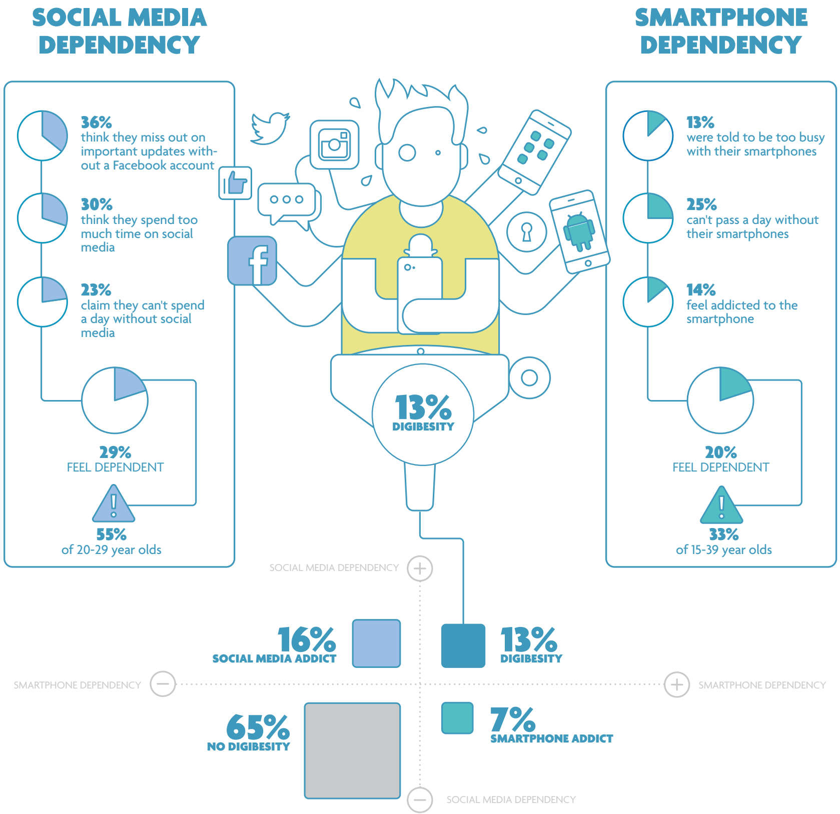
Strong dependency on the smartphone and social media

Online transactions and banking:
Most popular among 30 - 49 year olds

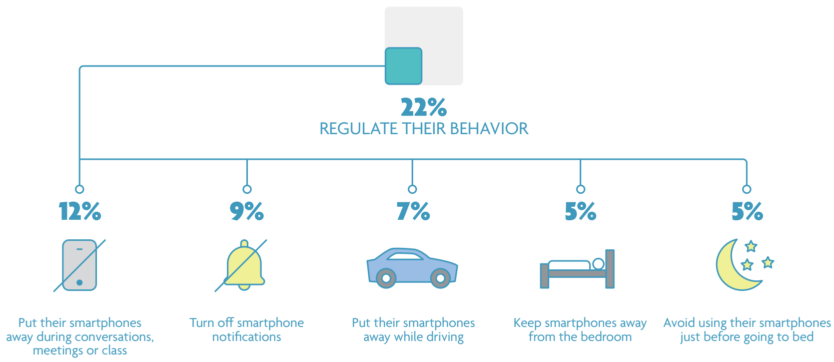


The sharing economy:
Unfamiliar to most Flemings

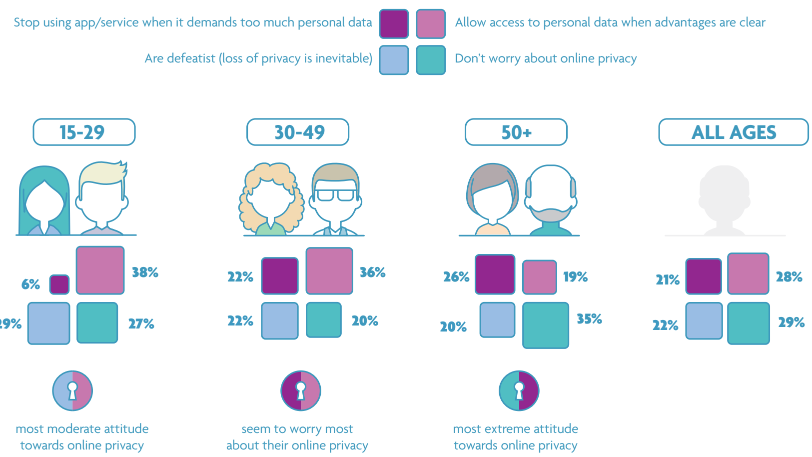




Smartphone behavior
Few Flemings regulate their behavior



Privacy
Attitude towards privacy



GENERAL MEDIA

E-COMMERCE & INTERNET BANKING

E-COMMERCE

Almost 2 in 3 Flemings claim to buy items online at least once per month (63,6%). Purchases are made most frequently by means of a computer (53,5%). Specifically Flemings younger than 50 years old state buying goods via an online platform at least once a month.

Selling items online is less of a habit for Flemings, but 3 in 10 still claim to do this on a monthly basis (28,9%). It seems that 30-39 year old Flemings in particular sell goods via an online service (40,0%).

BUYING ITEMS ONLINE

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Computer	53,9%	63,8%	59,5%	64,0%	50,4%	44,0%	37,0%	53,5%
Smartphone	14,7%	23,3%	26,6%	19,1%	6,1%	3,1%	0,6%	13,6%
Tablet	9,1%	10,1%	21,7%	20,1%	15,8%	7,6%	4,6%	13,4%
Smart TV	1,8%	0,0%	0,4%	0,1%	0,0%	0,0%	0,0%	0,2%
On any device	70,2%	73,3%	76,9%	75,9%	59,9%	48,4%	39,8%	63,6%

General media table 1: 'On which devices do you buy items online at least once per month?' (e.g. on 2ehands.be, on Bol.com, via Zalando) - split by age group (of people owning at least one of the mentioned devices, N=2.016)

SELLING ITEMS ONLINE

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Computer	23,4%	24,1%	25,9%	23,9%	20,8%	20,4%	17,0%	22,1%
Smartphone	7,7%	9,1%	15,3%	9,7%	3,5%	0,6%	0,8%	6,9%
Tablet	2,0%	3,5%	12,8%	8,4%	8,1%	4,2%	2,2%	6,4%
Smart TV	1,8%	0,2%	0,2%	0,0%	0,0%	0,0%	0,0%	0,2%
On any device	28,9%	28,8%	40,0%	33,0%	27,9%	23,7%	18,7%	28,9%

General media table 2: 'On which devices do you sell items online at least once per month?' (e.g. via your own webshop, on Kapaza, on eBay) - split by age group (of people owning at least one of the mentioned devices, N=2.016)

ONLINE BANKING

Online banking is a common practice in Flanders, as over 3 in 4 claim to manage their banking affairs at least once per month via an online or mobile service (77,4%). The computer is still the most commonly used device for online banking (58,9%). However, 1 in 3 Flemings claim to use a smartphone for banking affairs, indicating the importance of mobile banking (32,8%). Online banking is especially popular among 20-49 year olds (with 8 to 9 in 10 Flemings within those age segments claiming to use online banking on a monthly basis). Over half of 20-39 year old Flemings use a smartphone to engage in mobile banking. Online banking seems to be less common among the Flemings aged 65 and older, but still, over half of them do this on a monthly basis (55,7%).

ONLINE/MOBILE BANKING

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Computer	38,1%	55,1%	63,2%	69,1%	60,6%	66,1%	52,3%	58,9%
Smartphone	28,7%	52,5%	58,2%	40,4%	21,9%	12,7%	7,8%	32,8%
Tablet	6,4%	12,4%	20,3%	22,3%	21,3%	14,9%	9,0%	16,1%
Smart TV	3,9%	0,0%	0,4%	0,0%	0,0%	0,0%	0,0%	0,3%
On any device	66,3%	84,9%	91,4%	88,0%	76,1%	76,4%	55,7%	77,4%

General media table 3: 'On which devices do you manage your banking affairs online at least once per month?' (e.g. via website or mobile app of a bank) - split by age group (of people owning at least one of the mentioned devices, N=2.016)

CROWDFUNDING & SHARING ECONOMY

CROWDFUNDING

For a substantial portion of the population, crowdfunding is still unknown territory. 4 in 10 have never heard of the concept (39,5%). This seems especially true within the oldest age segment (62,4%) and more surprisingly within the 15-19 year old segment.

Only 7,0% of Flemings claim to have backed a crowdfunding campaign by donating money in the past year. Less than 1% have pitched a campaign themselves (0,8%).

PARTICIPATING IN A CROWDFUNDING CAMPAIGN DURING THE PAST YEAR

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
As a client/'backer' (donating money to campaign)	7,1%	10,0%	12,2%	7,6%	6,2%	5,1%	2,5%	7,0%
As a provider/entrepreneur (collecting money via campaign)	1,2%	1,7%	1,7%	0,4%	0,0%	0,0%	0,9%	0,8%
Haven't done it	38,3%	63,1%	65,3%	64,7%	54,4%	48,3%	34,3%	52,8%
Don't know it	53,3%	25,2%	21,2%	27,5%	39,4%	46,7%	62,4%	39,5%

General media table 4: 'Have you participated in a crowdfunding campaign during the past year? - split by age group (N=2.164)

SHARING PRIVATE TRANSPORT AND PRIVATE ACCOMMODATION

The use of platforms such as Lyft or Uber to share rides displays roughly the same tendencies as the use of crowdfunding: Very few have engaged in such services (2,5% as a client, 1,3% as a driver), and a substantial part is not familiar with the concept (37,9%).

11,0% of the Flemish population have rented a place to stay via platforms like AirBnB or Couchsurfing. Among 20-39 year old Flemings, this rises to almost 1 in 4. Offering a place to stay is far less common (1,1%). Also in this case, a substantial portion doesn't know exactly what this concept is (37,2%).

SHARING A RIDE WITH A PRIVATE PERSON (E.G. VIA UBER, LYFT) DURING THE PAST YEAR

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
As a client (paying for a ride)	1,9%	7,4%	5,3%	1,6%	1,3%	0,0%	0,0%	2,5%
As a driver	5,9%	2,4%	1,0%	0,8%	0,5%	0,0%	1,0%	1,3%
Haven't used it	35,1%	64,7%	74,2%	68,2%	60,9%	57,1%	42,5%	58,4%
Don't know it	57,0%	26,0%	19,5%	29,4%	37,3%	42,9%	56,5%	37,9%

General media table 5: 'Have you shared a ride with a private person using a platform such as Uber or Lyft during the past year?' - split by age group (N=2.164)

SHARING A PLACE TO STAY WITH A PRIVATE PERSON (E.G. VIA AIRBNB, COUCHSURFING) DURING THE PAST YEAR

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
As a client (looking for a place to stay)	6,0%	23,8%	22,4%	11,6%	7,3%	2,1%	2,2%	11,0%
As a provider (offering a place to stay)	4,8%	1,6%	1,7%	0,3%	0,5%	0,7%	0,4%	1,1%
Haven't used it	30,8%	54,5%	59,3%	61,5%	55,3%	55,2%	37,5%	51,0%
Don't know it	58,4%	20,3%	17,5%	26,7%	37,4%	42,0%	59,9%	37,2%

General media table 6: 'Have you shared a place to stay with a private person using a platform such as AirBnB or Couchsurfing during the past year?' - split by age group (N=2.164)

ATTITUDES & OPINIONS TOWARDS DIGITAL MEDIA

ATTITUDES & OPINION TOWARDS SMARTPHONES

Over 8 in 10 Flemings find it irritating when a friend frequently checks his/her mobile phone in the middle of a conversation (82,6%). This is a shared frustration across all age groups, although it seems that it is less pronounced within the youngest age segment (70,6%).

18,1% of the Flemish smartphone-owning population has received the remark that they are preoccupied with their smartphone. This seems especially true among 15-39 year old smartphone owners.

A third of Flemings can't spend a day without using a smartphone (34,4%), while 19,1% even feel addicted to the device. This is particularly the case among 15-39 year old smartphone owners.

ATTITUDES AND OPINIONS TOWARDS SMARTPHONES

	(Totally) disagree	Neutral	(Totally) agree
I feel irritated when a friend often checks his/her smartphone in the middle of a personal conversation	5,6%	11,8%	82,6%
Others tell me that I am preoccupied with my smartphone**	61,0%	20,9%	18,1%
I can't pass a day without a smartphone**	46,8%	18,8%	34,4%
I feel addicted to my smartphone**	60,6%	20,4%	19,1%

General media table 7: 'To what extent do you agree with the following statements (on a 5-point scale) (N=2.164, except where mentioned otherwise)
** Of people having access to a smartphone (N= 1.599)

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

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
I feel irritated when a friend often checks his/her smartphone in the middle of a personal conversation	70,6%	78,3%	81,3%	88,2%	87,5%	86,1%	80,9%	82,6%
Others tell me that I am preoccupied with my smartphone**	22,9%	22,3%	23,4%	17,9%	12,8%	11,1%	11,7%	18,1%
I can't pass a day without a smartphone**	36,2%	39,4%	43,4%	29,6%	32,1%	16,1%	31,7%	34,4%
I feel addicted to my smartphone**	31,6%	29,0%	29,1%	13,6%	11,3%	3,0%	7,7%	19,1%

General media table 8: Share (totally) agree with the statements (on a 5-point scale) - split by age group (N=2.164, except where indicated otherwise)
** Of people having access to a smartphone (N= 1.599)

IMPACT OF DIGITAL MEDIA ON WORK-LIFE BALANCE

A quarter of Flemings[22] agree that productivity at work sometimes suffers from loss of time spent on the internet for personal reasons (25,5%). 20-39 year old Flemings particularly agree with this statement.

On the other hand, work-related e-mails are not restricted to business hours for a substantial part of the population. 47,2% read e-mails at home during the work week (e.g. in the evening), 41,3% during weekends and 29,2% when they are on holiday.

IMPACT OF DIGITAL MEDIA ON WORK-LIFE BALANCE

	(Totally) disagree	Neutral	(Totally) agree
I sometimes lose time at work by using the internet for personal purposes	52,6%	21,9%	25,5%
During the working week I also read my work related e-mails at home (e.g. in the evening)	33,1%	19,6%	47,2%
I read my work related e-mails in the weekends	37,8%	21,0%	41,3%
I read my work related e-mails when on holiday	48,9%	21,8%	29,2%

General media table 9: 'To what extent do you agree with the following statements?' (on a 5-point scale) (of people not indicating 'Not applicable' to this statement, N= 1.567)

SHARE (TOTALLY) AGREE WITH STATEMENTS ON WORK-LIFE BALANCE – SPLIT BY AGE GROUP

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
I sometimes lose time at work by using the internet for personal purposes	23,2%	38,8%	37,3%	22,0%	18,8%	14,4%	10,1%	25,5%
During the working week I also read my work related e-mails at home (e.g. in the evening)	45,2%	54,7%	55,1%	52,6%	45,2%	33,4%	23,1%	47,2%
I read my work related e-mails in the weekends	43,1%	50,5%	48,9%	45,6%	38,7%	23,7%	15,7%	41,3%
I read my work related e-mails when on holiday	25,6%	36,4%	35,8%	31,8%	26,6%	16,2%	14,4%	29,2%

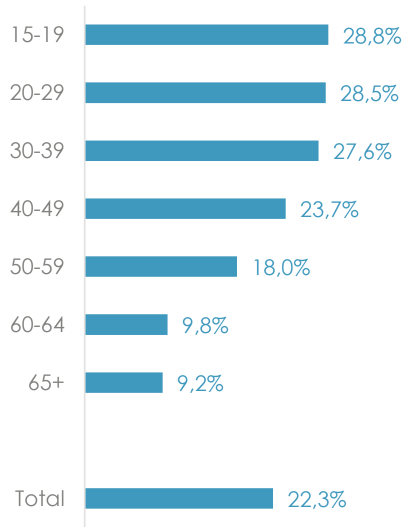
General media table 10: Share (totally) agree with the statements about work-life balance (on a 5-point scale) - split by age group (of people not indicating 'Not applicable' to this statement, N= 1.567)

22 The results were filtered by excluding the respondents who indicated that the question was not applicable to their situation.

ADAPTING SMARTPHONE BEHAVIOR

A fifth of smartphone owners claim that they try to manage their smartphone use by imposing rules on their smartphone behavior. 15-39 year old Flemings in particular claim to set rules on their smartphone use. Most commonly, this is done by actually putting the smartphone away at times when it can have a negative impact, for instance, while driving (7,2%) or during conversations or meetings (12,1%). The management of notifications is also an often cited way to optimize the use of smartphones (9,4%). Flemings aged 20-29 years old in particular state using these rules (put away in car: 13,2%; put away during meetings: 17,7%; switch notifications off: 15,3%).

ADAPTING SMARTPHONE BEHAVIOR BY IMPOSING RULES



General media graph 1: 'Do you impose rules on your smartphone behavior to regulate your use of a smartphone?'
(of people with access to a smartphone, N= 1.599)

ADAPTING SMARTPHONE BEHAVIOR BY IMPOSING RULES - SPLIT BY AGE GROUP

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Put away the smartphone during conversations, during meetings or during class	15,2%	17,7%	17,8%	12,4%	7,1%	1,1%	5,2%	12,1%
Switch notifications on smartphone off	7,6%	15,3%	14,8%	7,7%	6,1%	4,3%	2,9%	9,4%
Put away smartphone (e.g. in the trunk of the car) while driving	5,3%	13,2%	9,9%	5,7%	5,1%	2,2%	2,9%	7,2%
Keep smartphones away from bedroom	6,1%	1,0%	5,9%	5,7%	7,7%	5,4%	5,7%	5,3%
Not using smartphone just before going to bed	3,0%	5,2%	5,9%	6,4%	6,1%	4,3%	1,1%	5,0%
Turn smartphone off more often	3,8%	3,5%	2,3%	6,0%	0,6%	0,0%	4,0%	3,1%
Use a regular cell phone (GSM) instead of a smartphone now and then	0,8%	1,0%	0,3%	0,0%	2,9%	1,1%	1,1%	1,1%
Tracking the time spent on smartphone	3,0%	1,0%	1,3%	0,0%	1,0%	0,0%	0,6%	0,9%

General media table 11: 'Do you impose rules on your smartphone behavior to regulate the use of a smartphone?' - split by age group
(of people with access to a smartphone, N= 1.599)

OPINION ON THE ADVANTAGES OF THE INTERNET

'The internet allows you to find any information you want' is a widespread belief among Flemings. 3 in 4 Flemings agree with this statement (74,9%), although within the oldest age group, this figure is still 61,2%.

The other items differ more across generations. About 8 in 10 of 15-39 year old Flemings believe that they can stay in contact with more friends thanks to the internet, while this is true for 42,3% of Flemings aged 65 and older. Likewise, 8 in 10 Flemings between 15 and 39 years old think they discover things through the internet that they would have otherwise never discovered. Among Flemings aged 65 and older, this figure is 57,5%.

OPINION ON ADVANTAGES OF THE INTERNET

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Thanks to the internet I have access to all information I need	74,3%	82,4%	83,3%	76,8%	76,0%	80,2%	61,2%	74,9%
Thanks to the internet I can stay in touch with more friends	83,6%	82,1%	78,1%	53,1%	54,2%	49,7%	42,3%	60,4%
Thanks to the internet I discover things I would otherwise never have discovered	81,6%	82,0%	82,8%	77,0%	73,9%	75,0%	57,5%	73,7%

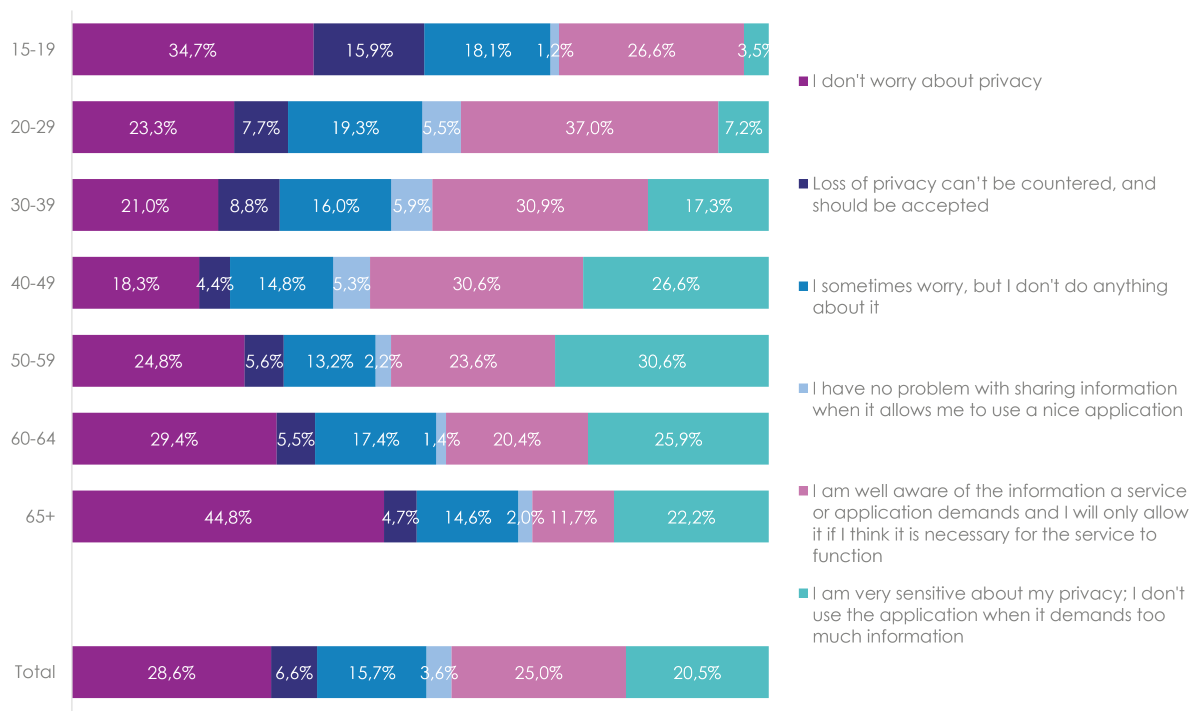
General media table 12: Share (totally) agree on statements about advantages of the internet - split by age group (N= 2.164)

PRIVACY ON THE INTERNET

ATTITUDE AND OPINION ON PRIVACY

Just as we saw in the chapter covering social media, it seems that the youngest age segment (15-19 years old) is less sensitive about online privacy. 34,7% of 15-19 year old Flemings state that they don't worry about online privacy, compared to 28,6% of the total population. In line with that statement, only 3,5% of the youngest segment claim to be very sensitive about their personal data, and that they would stop using a service if it demands too much information. Within the total population, 20,5% think this statement reflects how they think about privacy the best. 15-19 year olds more widely express defeatism when it comes to online privacy: 15,9% think that loss of privacy cannot be countered, and should just be accepted. Within the total population, only 6,6% feel this way.

20-29 year old Flemings show the largest proportion of people who are well aware of what data and information they share with a service or app, and that they only allow it if they see the necessity for the functioning of the app (37,0%, compared to 25,0% of the total population). Sensitivity to privacy seems to be highest among 50-59 year old Flemings (30,6%, compared to 20,5% of the total population).



General media graph 2: 'Which statement reflects best how you feel about privacy on the internet?' - split by age group (N= 2.164)

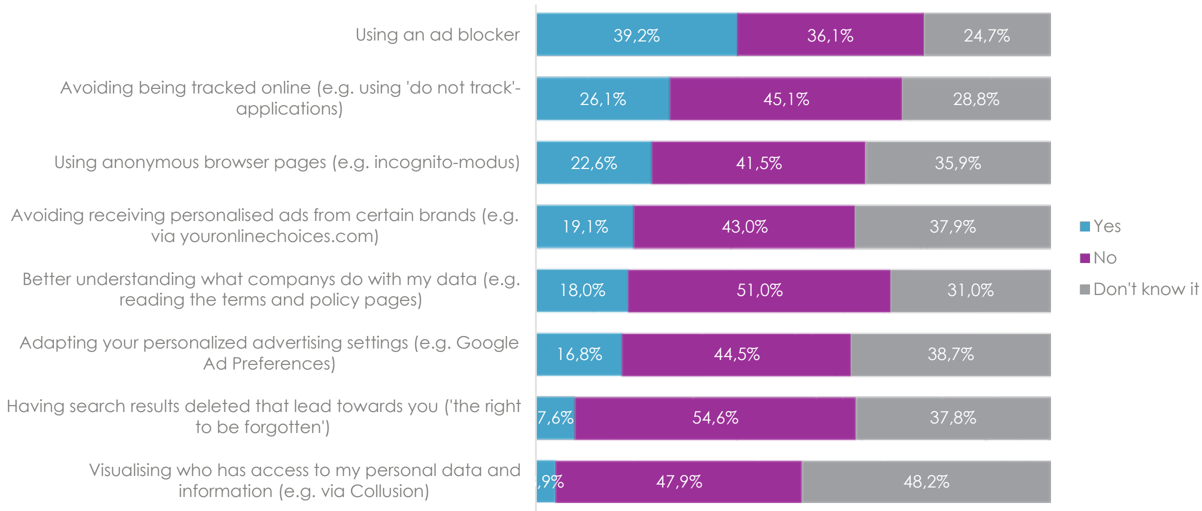
ACTIONS TO SECURE YOUR ONLINE PRIVACY

When it comes to managing online privacy, the use of ad blockers clearly comes in first place. 39,2% state having used an ad blocker within the past year[23]. A quarter of Flemings are not familiar with the concept of ad blockers (24,7%).

About a quarter of Flemings claim to have engaged in actions to avoid being tracked (26,1%) within the last year, while 22,6% have browsed anonymously (incognito/private mode) during the past year.

More advanced ways of managing online privacy, such as visualizing who has access to your personal data, are less known practices within the Flemish population. About half of the population has never heard of that possibility (48,2%), and only 3,9% have ever used this practice within the last year.

MEASURES TAKEN IN THE PAST YEAR TO MANAGE PRIVACY ONLINE



General media graph 3: 'Which of the following actions have you performed at least once in the past year to manage your privacy online?' (N= 2.164)

23 Note that we don't state that 39,2% of Flemings use an ad blocker at this moment. We only point out that about 4 in 10 Flemings have ever used an application or plug-in to block ads at some point within the last year.

A WORD ON DIGIBESITY

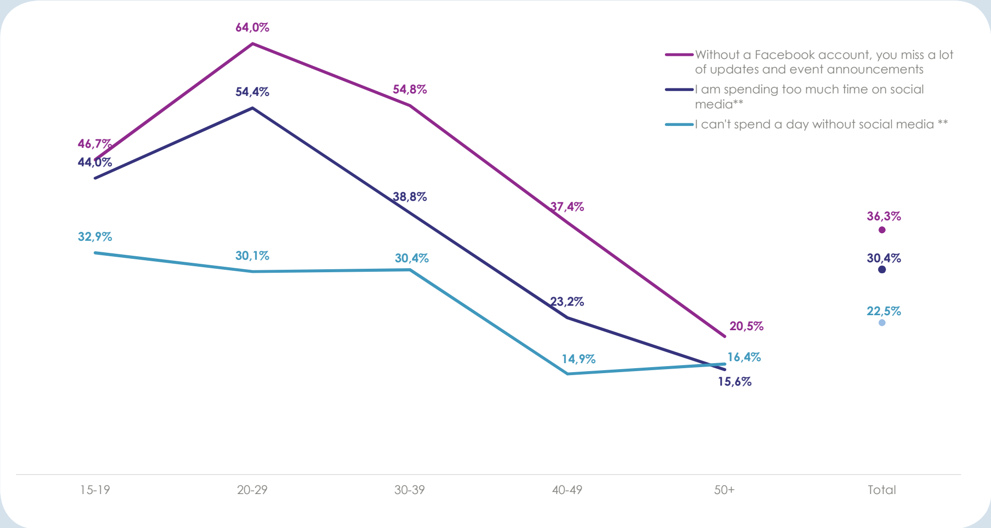
Last year, we saw that rapid developments in technology and digital media culminated in a feeling of excess and dependency for a group of Flemings. Younger households in particular seemed to experience trouble achieving a balance in the use of digital media and technology. This feeling of 'digital obesity' or 'digibesity' mainly occurs when the intensive use of technology (mainly smartphones) and digital media (mainly social media) conflicts with the time that individuals would prefer to spend on other matters (family, career, sports, hobbies, etc.).

This year, we included extra questions in our survey to take a closer look at this phenomenon. We first examine dependency on social media, moving to an examination of the impact of smartphones, and conclude with a population segmentation based on both dimensions of digibesity (social media and smartphone dependency).

SOCIAL MEDIA DEPENDENCY

As was apparent in the chapter on social media, a substantial part of the Flemish population reports feeling a form of dependency on social media. 36,3% believe that without a Facebook account, they would miss important updates and event announcements; 30,4% think that they spend too much time on social media; and 22,5% can't imagine spending a day without social media. This compulsive feeling directed towards social media seems to peak among 20-29 year old Flemings.

STATEMENTS ON SOCIAL MEDIA DEPENDENCY



Digibesity graph 1: Share (totally) agree on statements - split by age group (N=2.164, except where indicated otherwise)
** Filtered by those who have visited at least one social netwerk during the past month (N=1.714)

When we combine these 3 items into a global score of social media dependency, we see that 28,5% of the Flemish population indicates feeling dependent on social media[24]. Already clear in the responses to the individual items, social media dependency seems to be more prevalent among Flemings younger than 40 years old, peaking between 20-29 years old. This may come as no surprise, as social media is most frequently used among Flemings younger than 40 years old, and the 20-29 year olds in particular experience conflicts in time spent on social media and time spent on their careers, their families, hobbies, and so on.

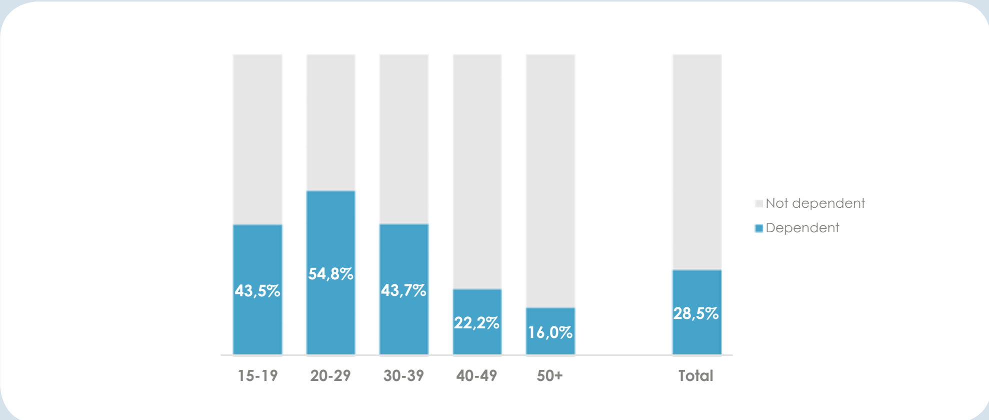
Feeling dependent on social media is closely related with frequent use of social networks. 33,5% of the people who use at least 1 social network per month experience social media dependency, while this is true for 42,5% of the Flemings who use at least 3 social networks per month. Instagram users in particular tend to be prone to experiencing social media dependency, as 51,3% of monthly Instagram users report feelings of dependency on social media. Furthermore, the more intensively one uses social media, the more likely it is that one experiences a feeling of addiction to social media. Over 7 in 10 Facebook and Instagram users who claim visiting those networks for at least 3 hours every day claim feeling addicted to social media.

24 Note that we only make assumptions on the perceived dependency on social media. We do not claim that 28,5% of the Flemish population is addicted to social media, we only stipulate that they do feel that way to a certain extent.

Worrying about the impact of social media on online privacy does not seem to be a differentiator for feeling dependent or not on social media. 29,3% of the people who agree on this topic concerning online privacy feel addicted to social media, which is at the same level as within the total population (28,5%). People who always reflect on what they share and with whom on social media are more susceptible to social media dependency (36,3%). Over half of the Flemings who agree that they share more now than before (53,0%) who don't have personal relationships (anymore) with most friends on Facebook (53,7%), or who can be triggered to watch a TV program through a message on social media (53,9%) feel dependent on social media.

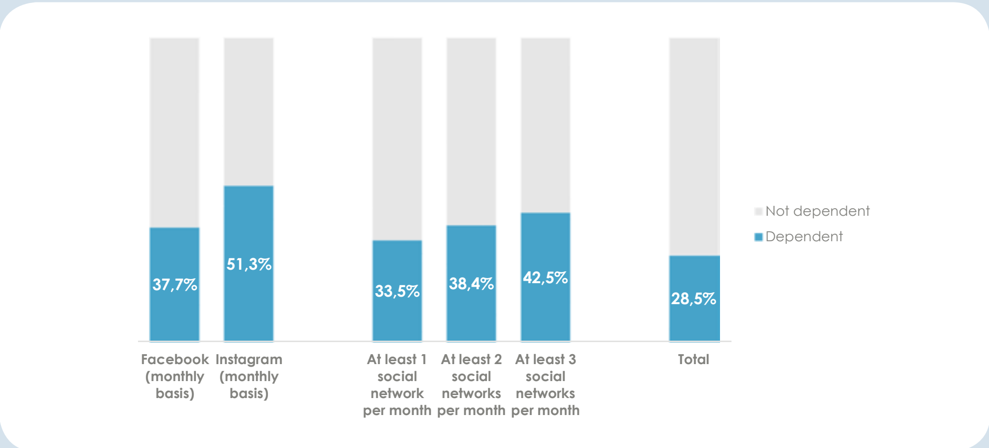
When we relate social media dependency to the digimeter profiles, we notice that Resistors are far less susceptible to feeling addicted to social media (9,7%) compared to the other profiles (Disruptor: 39,5%; Cumulator: 34,0%; Struggler: 30,4%). As Resistors are less familiar with social media, this comes as no surprise. More remarkable is the fact that Cumulators seem to be slightly less prone to social media dependency than Disruptors. Last year, we concluded that digibesity was more prevalent within the (then-called) Heavy Media Omnivores. However, this shift can be attributed to the fact that the segment of Cumulators has increased in size, especially within the older age groups. As we saw earlier that older age groups tend to have lower degrees of social media dependency, it is not surprising that the increased presence of older age groups among Cumulators has lowered the overall level of social media dependency. This is illustrated in Digibesity graph 7, where we see that within the younger age groups (15-19 years old, 20-29 years old and 30-39 years old), the rate of social media dependency is higher among Cumulators than among Disruptors. So, we can conclude that, when we control for the age effect, the degree of social media dependency is still highest among Cumulators.

SOCIAL MEDIA DEPENDENCY - SPLIT BY AGE GROUP



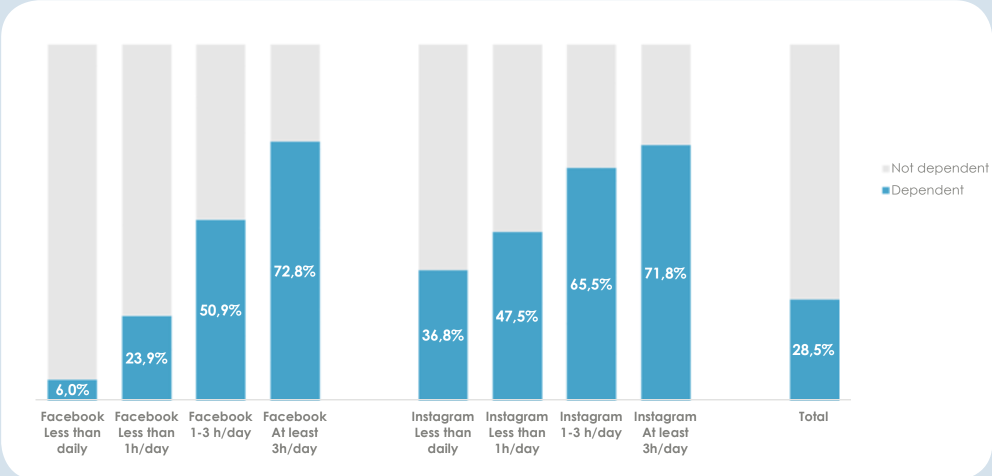
Digibesity graph 2: Social media dependency - split by age group (N=2.164)

SOCIAL MEDIA DEPENDENCY - MONTHLY USE OF SOCIAL MEDIA



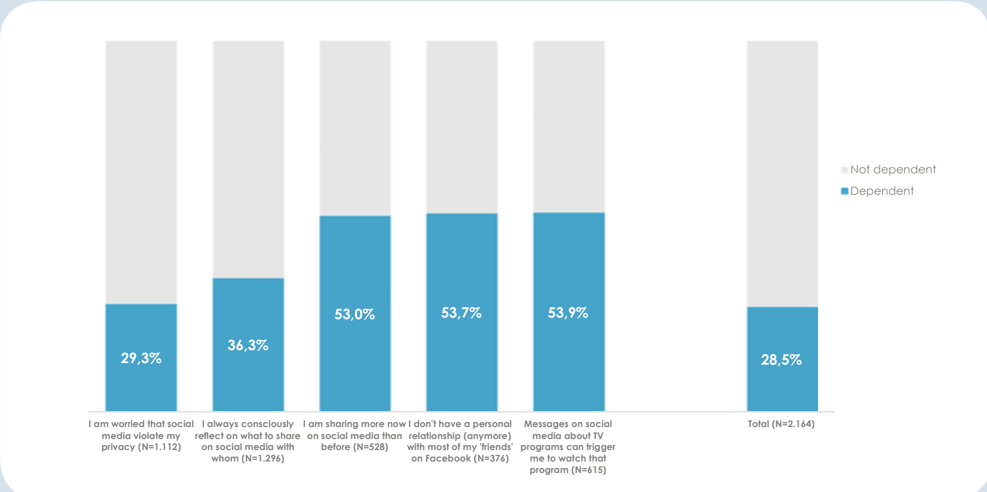
Digibesity graph 3: Social media dependency - monthly use of social media (N=2.164)

SOCIAL MEDIA DEPENDENCY - DAILY USE OF SOCIAL MEDIA



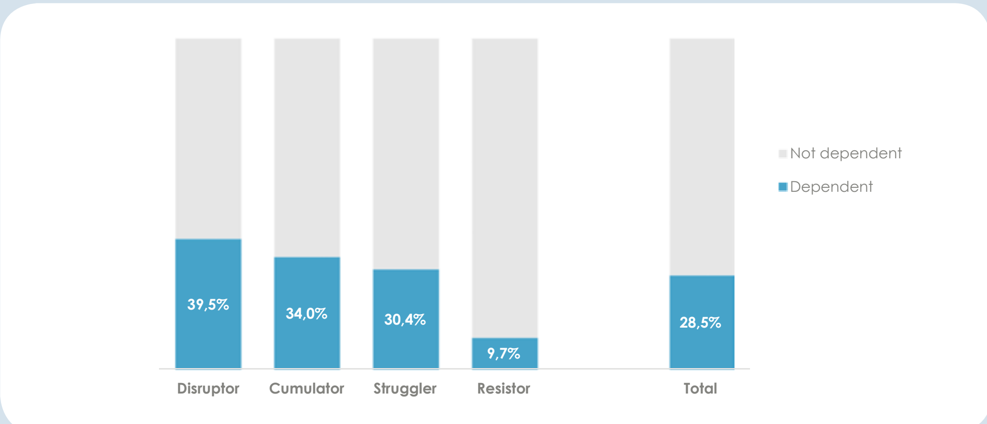
Digibesity graph 4: Social media dependency - daily use of social media (of monthly users of the specific social network)

SOCIAL MEDIA DEPENDENCY - OPINION ON SOCIAL MEDIA



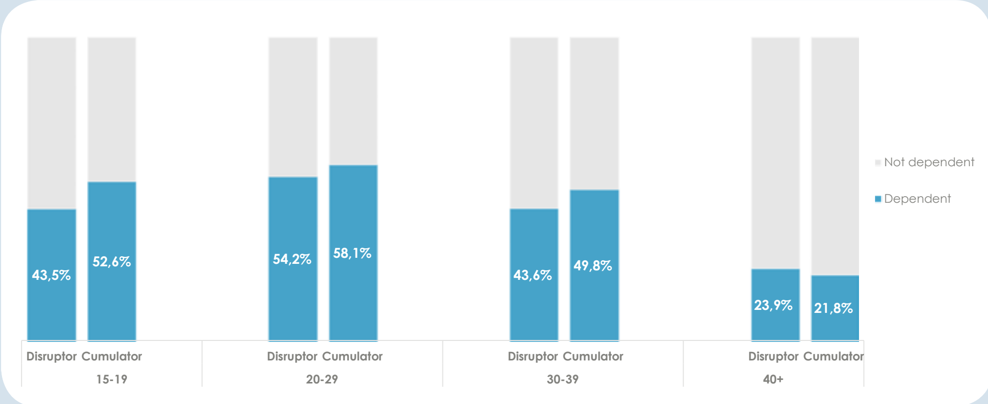
Digibesity graph 5: Social media dependency (filtered by those who agree with the specific statement)

SOCIAL MEDIA DEPENDENCY - DIGIMETER SEGMENTS



Digibesity graph 6: Social media dependency - digimeter segments (N=2.164)

SOCIAL MEDIA DEPENDENCY - DISRUPTOR VS. CUMULATOR, SPLIT BY AGE GROUP

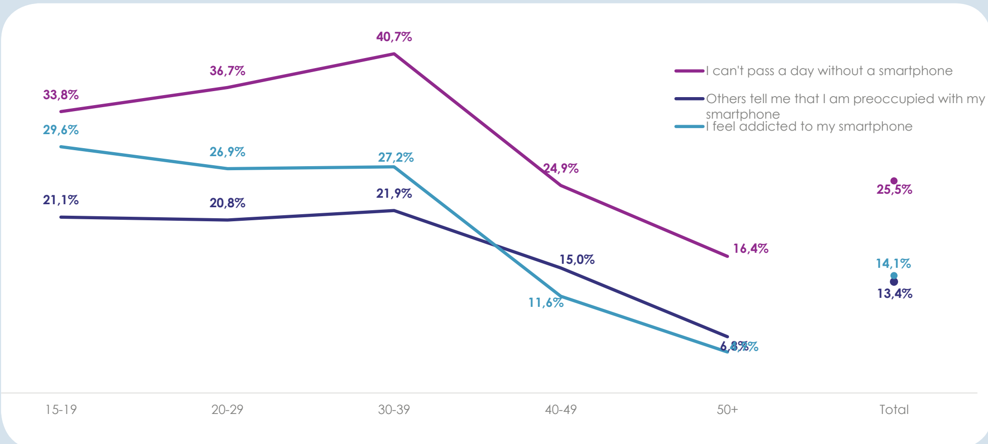


Digibesity graph 7: Social media dependency - Disruptor vs. Cumulator, split by age group

SMARTPHONE DEPENDENCY

Another dimension of digibesity is the feeling of dependency on the smartphone. As with social media dependency, scores on the statements of smartphone dependency seem to be higher among Flemings younger than 40 years old. A quarter of the Flemish population claims to be unable to pass a day without the smartphone (25,5%), with peaks among 30-39 year olds (40,7%) and 20-29 year olds (36,7%). 14,1% feel addicted to the smartphone (for Flemings younger than 40, this is between 26% and 30%). 13,4% have received the remark that they are too preoccupied with their smartphones (among 15-39 year old Flemings, this is between 20% and 22%).

STATEMENTS ON SMARTPHONE DEPENDENCY

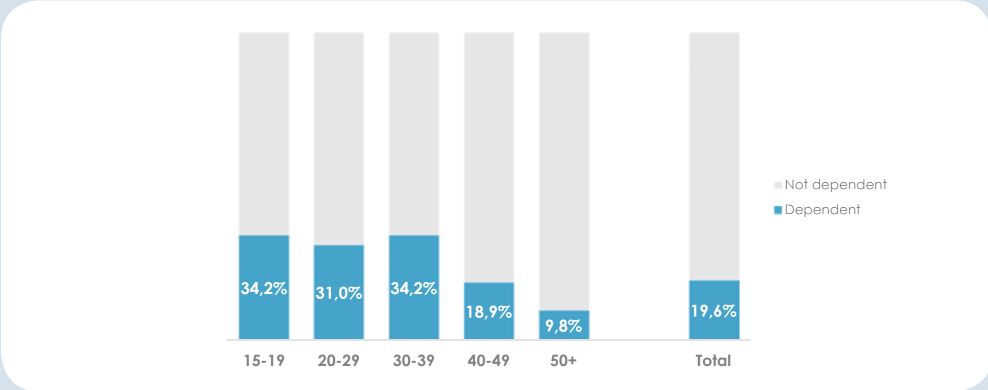


Digibesity graph 8: Share (totally) agree on statements - split by age group (N=2.164)

When combining these 3 items into a global score on smartphone dependency, we see that 19,6% of the Flemish population feels dependent on the smartphone. As was clear from the responses to the individual items, the rate of smartphone dependency is higher among Flemings younger than 40 years old.

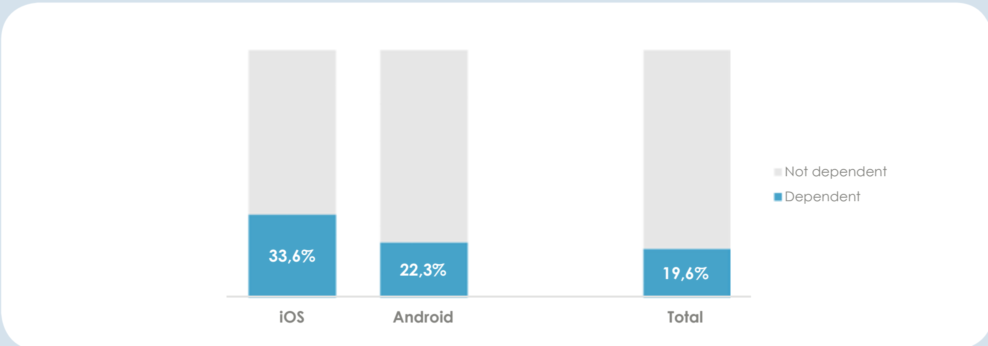
Flemings with an iPhone tend to be more susceptible to smartphone dependency (33,6%) than people with Android phones (22,3%). Not surprisingly, there is a clear positive relationship with smartphone use frequency: the more people use their smartphones, the likelier they are to feel dependent on that device. Smartphone dependency is more prevalent among Disruptors (32,6%) and Cumulators (26,0%) than among Strugglers (9,9%) and Resistors (2,3%).

SMARTPHONE DEPENDENCY - SPLIT BY AGE GROUP



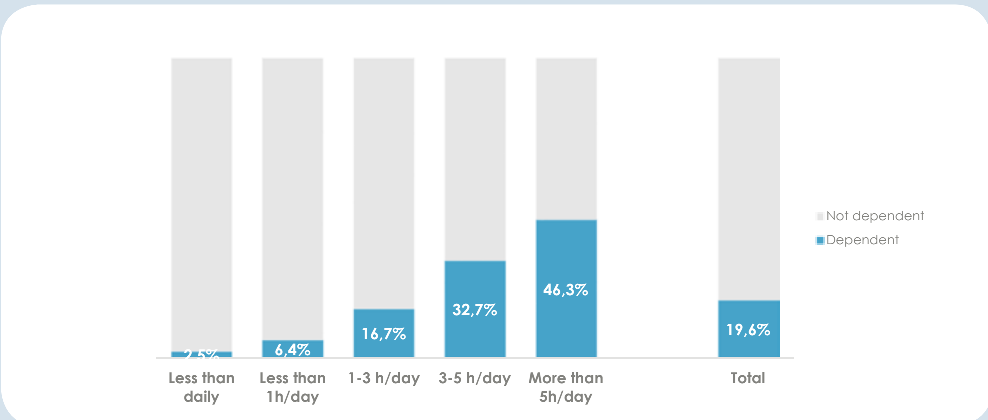
Digibesity graph 9: Smartphone dependency - split by age group (N=2.164)

SMARTPHONE DEPENDENCY - SPLIT BY SMARTPHONE OPERATING SYSTEM



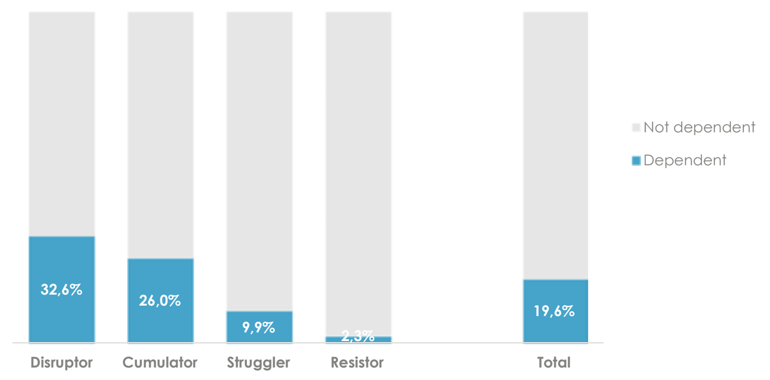
Digibesity graph 10: Smartphone dependency - split by smartphone operating system (N=2.164)

SMARTPHONE DEPENDENCY - SPLIT BY SMARTPHONE USE FREQUENCY



Digibesity graph 11: Smartphone dependency - split by use frequency of smartphone (N=2.164)

SMARTPHONE DEPENDENCY - SPLIT BY DIGIMETER SEGMENTS

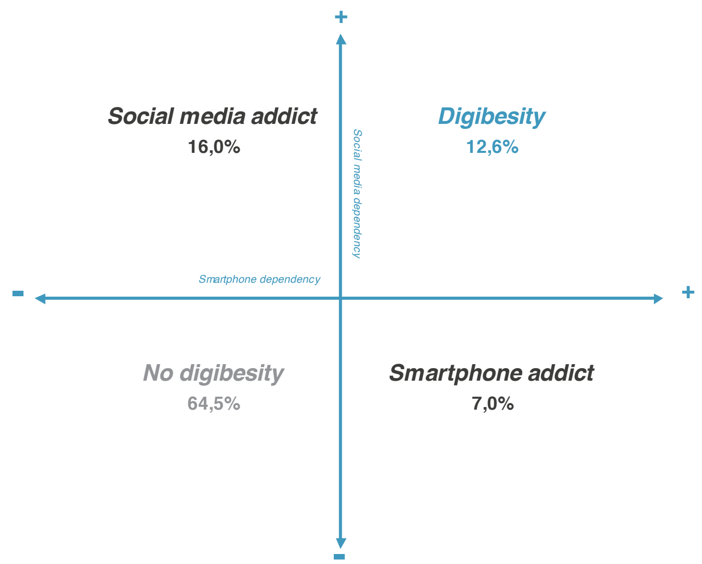


Digibesity graph 12: Smartphone dependency - split by digimeter segments (N=2.164)

DIGIBESITY: SOCIAL MEDIA & SMARTPHONE DEPENDENCY

Plotting both social media dependency and smartphone dependency on 2 axes, we can distinguish 4 segments of digibesity. A first segment scores low on both social media and smartphone dependency, and in that way does not show any signs of digibesity. Almost 2 in 3 Flemings fall into this segment (64,5%). A second segment scores high on social media dependency, but low on smartphone dependency. These Social Media Addicts account for 16,0% of the Flemish population. The segment of Smartphone Addicts is the mirror image of this figure, with a high score on smartphone dependency but a low score on social media dependency. This segment accounts for 7,0% of the population. The last segment combines high scores on both social media and smartphone dependency. 12,6% of Flemings belong to this digibesity segment.

DIGIBESITY SEGMENTS

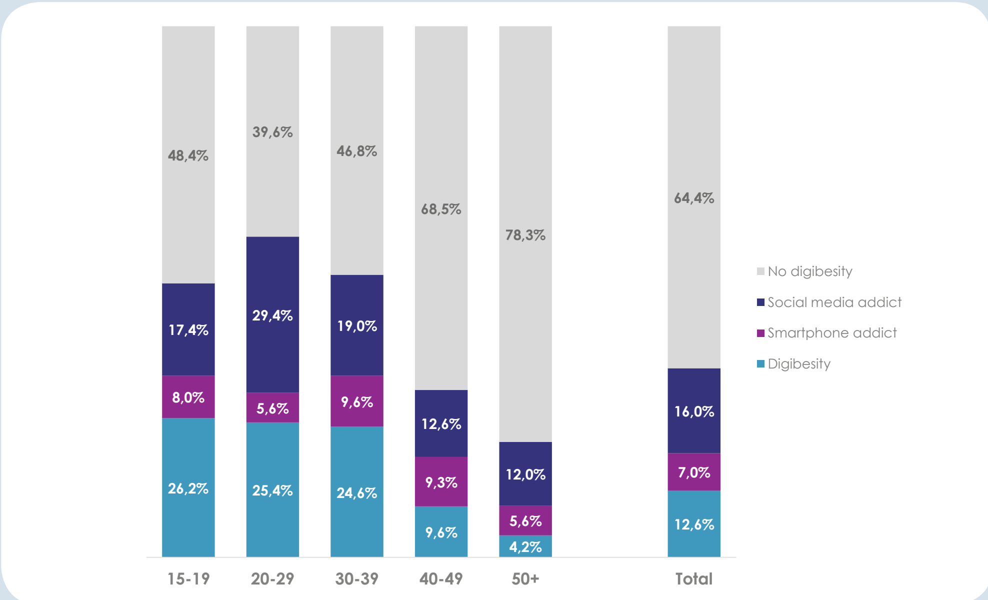


Digibesity graph 13: Digibesity segments (N=2.164)

A quarter of Flemings aged 15-39 years old fall within the Digibesity segment (high scores on both social media and smartphone dependency). The segment of Social Media Addicts is highest among 20-29 year old Flemings (29,4%). Almost 8 in 10 of Flemings older than 50 do not seem to feel dependent on social media nor on the smartphone (78,3%).

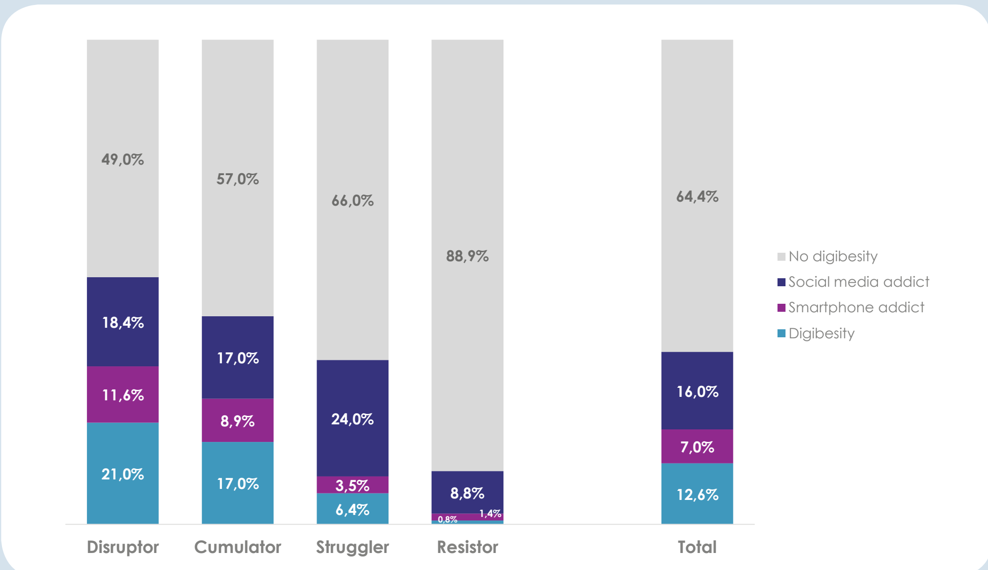
Disruptors (21,0%) and Cumulators (17,0%) seem to suffer the most from digibesity. A quarter of Strugglers can be seen as Social Media Addicts (24,0%), which is the highest share compared to within the other digimeter profiles. This can be explained by the fact that this profile scores high on social media dependency (30,4%, see above), while only 9,9% of Strugglers score high on smartphone dependency. This divide between both forms of dependency is lower within the other digimeter profiles. Almost 9 in 10 of Resistors do not suffer from any form of digibesity (88,9%).

DIGIBESITY SEGMENTS - SPLIT BY AGE GROUP



Digibesity graph 14: Digibesity segments - split by age group (N=2.164)

DIGIBESITY SEGMENTS - SPLIT BY DIGIMETER PROFILES



Digibesity graph 15: Digibesity segments - split by digimeter profiles (N=2.164)

GENERAL MEDIA: DIGIMETER PROFILES

DISRUPTOR (24,1%)

Buying (70%) or selling (30%) items via online platforms are common practices among Disruptors. Typical for this segment is the high use rate of smartphones to buy or sell items online compared to all other segments, while the use of computers and tablets is less frequent compared to Cumulators. The same conclusion can be drawn when it comes to online banking. Where Cumulators use a computer or tablet more frequently to manage their banking affairs, the use of mobile banking apps on smartphones is slightly higher among Disruptors.

11% of Disruptors have backed a crowdfunding campaign in the past year, and 16% have reserved a place to stay via a platform such as AirBnB or Couchsurfing.

Disruptors agree less than Cumulators and Strugglers that it can be irritating if a friend constantly checks his/her smartphone during a conversation (79%). However, this segment is the most likely to be given the remark that they are spending too much time on their smartphones (23%). They do show the highest dependency on the smartphone, as 38% can't spend a day without their smartphone and 25% feels addicted to the device. A quarter of Disruptors actively managing their smartphone use, mainly by putting it away during a conversation or meeting (15%) or by turning off push notifications (11%).

More than other segments, the internet is a medium for keeping in touch with friends. 75% agree that the internet allows them to keep in contact with more friends (compared to 60% across all segments).

Disruptors have a diversified privacy profile. 23% don't worry at all about their online privacy, while 29% critically reflect on what authorizations are really necessary for apps to function before granting the app access to that specific data or smartphone application. The use of tools and settings to secure their online privacy is higher among Disruptors than within any other segment. The use of ad blockers (59%) and anonymous browser pages (39%) are well-known practices among Disruptors.

CUMULATOR (38,6%)

Cumulators are more familiar with buying and selling items through online platforms than any other segment. Likewise, online banking seems to be more popular among Cumulators than in any other profile.

16% of Cumulators have rented a place to stay during the past year via a platform such as AirBnB or Couchsurfing. Crowdfunding (8%) and sharing rides via platforms like Uber (4%) are less frequently used.

Almost 9 in 10 Cumulators find it irritating when a friend constantly checks his or her smartphone during a conversation (87%). Only 17% claim to have ever been the target of the remark that they were too preoccupied with their smartphone. Although 37% claim that they can't pass a day without their smartphone (which is at the same level as among Disruptors), only 17% state they feel addicted to their smartphone (which is significantly less than the 25% among the Disruptors). So, while they do admit to being dependent on the smartphone, this seems to lead less frequently to a feeling of being addicted to that device. Just as with Disruptors, about a quarter of Cumulators state having regulated their smartphone use to some extent (23%).

Cumulators show the highest tendency of blurring the line between work and private life through the use of online communication. 29% admit that they are sometimes less productive at work because they are performing internet tasks for private reasons. On the other hand, Cumulators are more likely than any other segment to read work-related e-mails outside working hours.

Cumulators agree more than any other profile that the internet is a gateway to all the information they need (87%), and that they discover things through the internet that they otherwise would have never discovered (86%).

Cumulators are well aware of the impact that apps can have on their online privacy. 34% state critically considering whether access to personal data or another application of the device (e.g. access to the camera of the smartphone or tablet) is really necessary for the functioning of the app. However, only 16% are willing to to stop the use of an application when they have to grant access to too much personal data.

A substantial portion of Cumulators have used tools or have adjusted settings to secure their online privacy. The use of ad blockers (44%) and the adjustment of cookie settings or using 'do-not-track' solutions (31%) are among the most popular actions.

STRUGGLER (10,9%)

Strugglers tend to buy items online (60%) less frequently compared to Disruptors (70%) and Cumulators (78%). Selling items online (32%) and using online/mobile platforms to manage banking affairs (81%) are more in line with those other two segments. The use of crowdfunding, AirBnB and Uber is far less common among this segment.

Strugglers agree that it is irritating when a friend constantly checks their smartphone during a conversation (87%). Almost 1 in 5 Strugglers have received the remark that they are too preoccupied with their smartphones themselves (19%). Although the number of Strugglers that feel addicted to the smartphone (23%) is comparable with that of Disruptors (25%), they agree less that they can't pass a day without a smartphone (24%, compared to 38% among Disruptors). 22% of Strugglers regulate their use of the smartphone, mainly by putting it away during a conversation or a meeting (11%). Remarkably, managing push notifications is a less common practice (4,7%) compared to among Disruptors (11%) or Cumulators (10%).

Strugglers tend to have a more passive attitude when it comes to online privacy compared to the other segments. 29% of Strugglers don't worry at all, while 19% claim to worry about the impact on their online privacy, but do not engage into any specific actions to secure their privacy. 8% claim that it's impossible to achieve true online privacy anyway. This passive attitude is also apparent when it comes to using tools or adjusting settings.

RESISTOR (26,3%)

Resistors are far less familiar with buying (29%) and selling (12%) items online, or managing their banking affairs online (45%) compared to the other segments. About 6 in 10 Resistors have never heard of crowdfunding (62%), Uber (59%) or AirBnB (62%), rates that are higher than those of any other segment. It may come as no surprise that this segment shows the lowest level of dependency on the smartphone, as 3% have received a remark about being too preoccupied by their smartphone, only 16% can't imagine a day without smartphone, and only 8% claim to feel addicted to their smartphone. As such, they are less likely to regulate their smartphone behavior (8%).

Overall, Resistors are less convinced of the benefits of the internet compared to the other segments. Only 49% agree that the internet allows them to find all information they need, 46% agree that they discover things through the internet that they otherwise would never have discovered, and only 26% think that the internet allows them to keep in touch with more friends.

When it comes to online privacy, Resistors seem to be divided into two large groups. While 44% don't worry at all about their online privacy, 28% claim to be very strict on this matter and state that they stop using a specific app or service when it demands too much personal data.

Buying items online (monthly basis)

	Any device	Computer	Smartphone	Tablet
Disruptor	70%	58%	23%	13%
Cumulator	78%	65%	17%	20%
Struggler	60%	51%	4%	12%
Resistor	29%	28%	1%	2%

Selling items online (monthly basis)

	Any device	Computer	Smartphone	Tablet
Disruptor	30%	23%	11%	6%
Cumulator	36%	27%	9%	9%
Struggler	32%	23%	2%	8%
Resistor	12%	10%	1%	2%

Online/mobile banking (monthly basis)

	Any device	Computer	Smartphone	Tablet
Disruptor	82%	56%	47%	15%
Cumulator	90%	68%	45%	24%
Struggler	81%	65%	10%	17%
Resistor	45%	41%	4%	2%

Crowdfunding during past year

	As financer ('backer')	As entrepreneur (collecting money via campaign)	Not used	Don't know what it is
Disruptor	11%	1%	55%	34%
Cumulator	8%	1%	64%	28%
Struggler	3%	1%	58%	38%
Resistor	4%	1%	33%	62%

Sharing rides (e.g. Uber, Lyft) during past year

	As customer	As driver	Not used	Don't know what it is
Disruptor	3%	1%	62%	34%
Cumulator	4%	1%	70%	26%
Struggler	1%	2%	59%	39%
Resistor	0%	3%	38%	59%

Sharing place to stay (e.g. AirBnB, Couchsurfing) during past year

	As customer	As provider	Not used	Don't know what it is
Disruptor	16%	1%	51%	31%
Cumulator	16%	1%	60%	24%
Struggler	5%	0%	57%	39%
Resistor	2%	1%	36%	62%

Statements (% (totally) agree)

	I feel irritated when a friend often checks his/her smartphone in the middle of a personal conversation	Others tell me that I am preoccupied with my smartphone *(filtered on smartphone owners)*	I can't pass a day without a smartphone *(filtered on smartphone owners)*	I feel addicted to my smartphone *(filtered on smartphone owners)*
Disruptor	79%	23%	38%	25%
Cumulator	87%	17%	37%	17%
Struggler	87%	19%	24%	23%
Resistor	78%	3%	16%	8%

Statements (% (totally) agree)

	I sometimes lose time at work by using the internet for personal purposes	During the working week I read my work related e-mails at home (e.g. in the evening)	I read my work related e-mails in the weekends	I read my work related e-mails when on holiday
Disruptor	29%	51%	45%	32%
Cumulator	29%	58%	51%	37%
Struggler	26%	41%	33%	23%
Resistor	12%	20%	17%	9%

Regulating smartphone behavior *(filtered on smartphone owners)*

	At least 1 rule	Put away the smartphone during conversations, during meetings or during class	Switch notifications off	Put away smartphone while driving (e.g. in the trunk of the car)	Keep smartphones away from bedroom	Not using smartphone just before going to bed
Disruptor	26%	15%	11%	7%	4%	6%
Cumulator	23%	12%	10%	8%	6%	5%
Struggler	22%	11%	5%	7%	8%	3%
Resistor	8%	2%	3%	3%	5%	3%

Statements (% (totally) agree): Thanks to the internet...

	... I have access to all information I need	... I can stay in touch with more friends	... I discover things I would otherwise never have discovered
Disruptor	81%	75%	80%
Cumulator	87%	72%	86%
Struggler	80%	69%	82%
Resistor	49%	26%	46%

Attitude and opinion on privacy

	I don't worry about privacy	Loss of privacy can't be countered, and should be accepted	I sometimes worry, but I don't do anything about it	I have no problem with sharing information when it allows me to use a nice application	I am well aware of the info/data a service demands and I will only allow access if I think it is necessary for the service to function	I am very sensitive about my privacy; I don't use the application when it demands too much information
Disruptor	23%	8%	17%	5%	29%	19%
Cumulator	21%	7%	17%	4%	34%	16%
Struggler	29%	8%	19%	2%	21%	22%
Resistor	44%	4%	12%	3%	9%	28%

Actions performed during past year to secure online privacy

	Using an ad blocker	Avoiding being tracked online	Using anonymous browser pages	Avoiding receiving personalized ads from certain brands	Better understanding what companys do with my data	Adapting your personalized advertising settings
Disruptor	59%	35%	39%	26%	26%	25%
Cumulator	44%	31%	27%	23%	21%	20%
Struggler	35%	24%	14%	21%	14%	12%
Resistor	15%	11%	4%	7%	8%	7%

What is the favorite social medium in Flanders? How many hours per week do Flemish people watch TV? And which devices do they use?

The imec digimeter 2016 report sheds light on Flanders' media consumption habits and media possession, with findings and results based on our annual survey amongst 2.164 Flemings aged 15 and older.

www.imec.be/digimeter

imec

embracing a better life