DIGIMETER

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ADOPTION AND USAGE OF MEDIA & ICT IN FLANDERS

iMinds
ILAB.O

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Preface

Digimeter is a research initiative of iMinds, a digital research center and business incubator with the ambition to stimulate demand-driven and user-centered innovation in the broad Flemish ICT-sector. This ambition makes it indispensable for the more than 850 academic researchers directly connected to iMinds, to keep up to date with trends, habits and practices of the 'demand-side' or the end-user. Thus, this is the Digimeter's primary research goal:

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

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

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

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[1] For more information regarding more in-depth analysis or these data, please contact Lieven De Marez (lieven.demarez@ugent.be) or Dimitri Schuurman (dimitri.schuurman@ugent.be).

[2] Panel management can be contacted through panel@iminds.be or +32 9 331 48 00.

Following every Digimeter wave, the survey itself and the data gathering is subjected to critical analysis and academic reflection by thematic experts in order to optimize and actualize each next wave. We wish to thank all people and organizations involved in the data-gathering phase as well as all organizers granting their permission to recruit respondents during their events. Last but not least, we also want to thank all of the respondents having filled out one or more of the Digimeter-surveys. Without these end-users, sharing their media habits and practices, this report would not have been feasible.

Digimeter methodology

iMinds' Digimeter is an **annual monitoring of a representative set of at least 1500 inhabitants of Flanders (at least 15 years old) on their usage and possession of (new) media and ICT**.

- This is the sixth report of the Digimeter which monitors these evolutions anually.
- To allow for representative results for Flanders, a minimum quota sample of N=1500, based on the most recent federal statistics of 2013[1], is defined by province, sex and age (15+). The total dataset is weighted based on these quota.
- In the period August 2013 - September 2013 3.519 individuals have completed the survey. 1.094 were collected 'offline' by means of CAPI-interviews (Computer (tablet) Assisted Personal Interviews) and 2.425 respondents filled out the survey online.
- To avoid skewed figures in terms of Internet and computer possession, a great amount of the recruitment of respondents has been carried out offline through trained interviewers. These offline recruitment events have taken place across all provinces in Flanders on public places (e.g. music festivals, in shopping streets, on markets, ...). People not in the mood for filling out the survey right away received a paper version and were asked to complete it at home.
- The mean time for filling out the survey was 28 minutes (wave 5: 29,5 minutes).
- The survey consists of nine thematic chapters: TV, computer, tablet, telephony, bundles, social media sites, playing games and traditional media (radio, music and following the news) and finally general media use. Depending on their answers, respondents were directed to more questions regarding applications and other information regarding these technologies and media types. This way, Digimeter provides quantitative insights into the **adoption diffusion** as well as in the **use diffusion** of (new) media and ICT. The survey was concluded by a list of socio-demographic questions.
- All respondents had an equal chance of winning a voucher with a total amount of €1.800. Besides this incentive, it appeared that the subject 'media & ICT' is appealing enough for a lot of people to participate in the research. 65,5% (60,5% Digimeter 5) indicated they could be contacted if their profile was selected for taking part in user- or living lab-research. This suggests that the adoption and usage of (new) media and ICT is a topic of interest for the majority of the Flemish population.

In order to read and interpret all numbers and percentages within this report correctly, the reader needs to take into account that the data are taken from a representative quota sample of the Flemish 15+ population. This methodology inherently entails a small margin of error on the resulting figures.

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[1] The Belgian federal institutes for statistics: Federaal Planbureau; FOD Economie - Algemene Directie Statistiek en Economische Informatie

However, for the readability of the report, only one percentage is given, but for a scientifically accurate interpretation, a confidentiality interval of plus and minus 2,5% needs to be taken into account. Numbers indicated with the symbol * report the evolution with regard to the previous wave.

Summary

General: media ownership and ICT-adoption in Flanders

We start with a general overview regarding media adoption and the level of ICT-diffusion in Flanders.

The adoption level of the aggregation of computer types (laptop and desktop) currently resides at 92,4% (+0,5%)*. 78,7% of the Flemish households has a laptop, while only 55,3% has a desktop. Almost all computer owners have an Internet connection at home (93,1% of the total population).

Like last year, both types of game consoles decreased in comparison to the previous wave with respectively 10,6% for handheld game consoles and 8% for game consoles that can be connected to the TV. Contrary to the activity of gaming 'an sich', which is still gaining in popularity (though it spreads to more devices like computers, tablets and smartphones), the number of dedicated gaming devices actively used among the Flemish 15+ population is decreasing to 20,8% for TV connected consoles, and 8,9% for handheld gaming consoles.

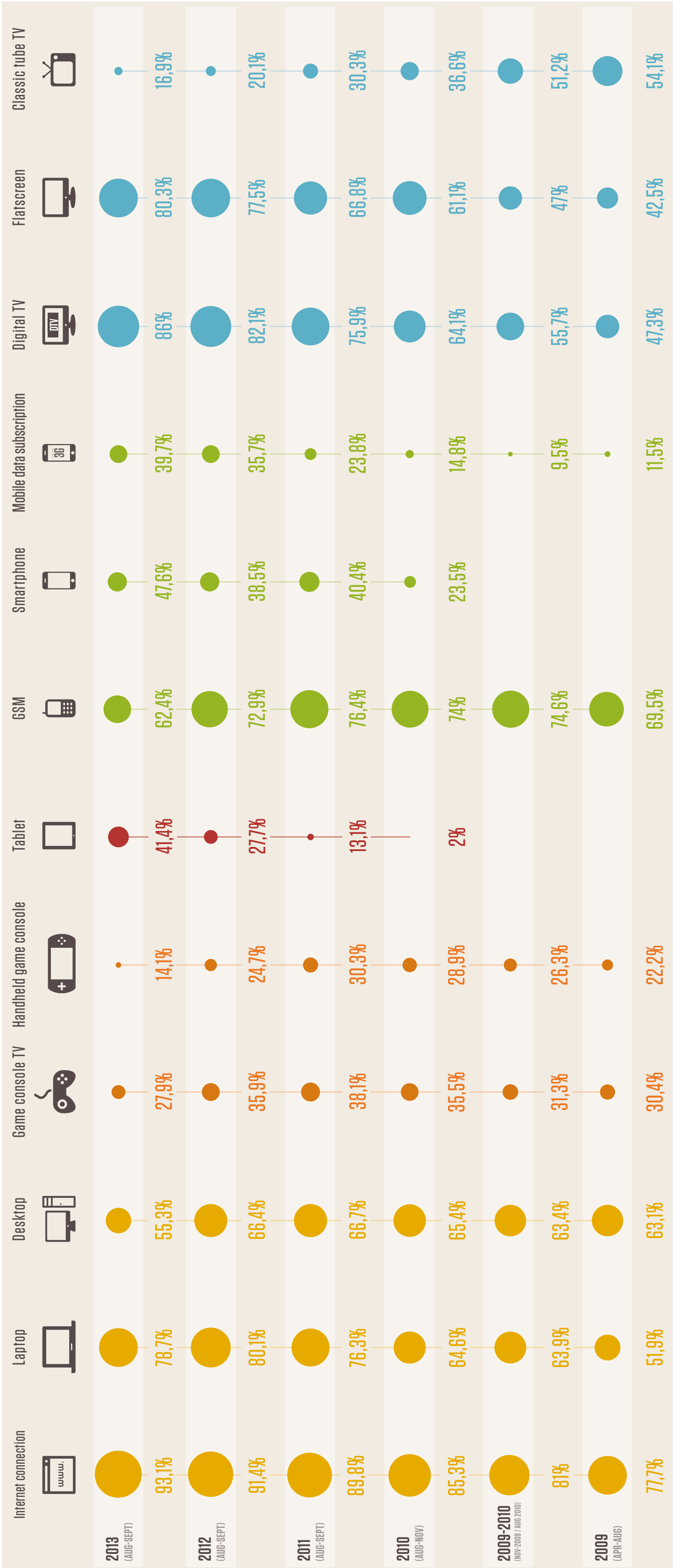
Tablets are clearly still booming. In wave five (2012) 27,7% of the Flemish population owned a tablet. Now (2013) already 41,4% has adopted a tablet, which means a remarkable increase of 13,7%.

Telephony remains the most adopted technology in Flanders as the aggregated adoption level of fixed and mobile accounts for 99,3% of the Flemish population. As indicated last year, there is a slight decline in adoption level of the fixed telephone (-1,4%)*, while the mobile phone adoption seems to stagnate at 95,8% (+0,6%)*.

The adoption level of the television device remains stable, with 97,2% owning a TV-set. For 80,3% a flatscreen is the primary TV screen, for 16,9% this is a classic tube TV. Digital television still gains ground as 86% of the Flemish households watches digital, an increase of 3,9% since the previous wave. Digital television through satellite and DVB-T remain niche technologies in Flanders (respectively 4% and 5,1%).

The following table shows the results of our latest survey (2013) and, if possible, a comparison with data of the previous Digimeter waves.

Media and ICT adoption in Flanders – 2009 to 2013



Infographic 1: Media and ICT adoption in Flanders – 2009 to 2013 (%).

FACTS

MULTISCREEN

The Flemish households are (more than ever) ‘multiscreen’ households: 70% has at least three screens at home.

- 27%[1] of Flemish households are triple screen households: they have three screens at home, usually a TV, laptop and desktop (-3% compared to 2012).
- 27% of Flemish households are quadruple screen households: they have four screens at home, generally a TV, laptop, smartphone and desktop (+3% compared to 2012).
- 16% of Flemish households are quintuple screen households: they have five screens at home: TV, desktop, laptop, smartphone and tablet (+2% compared to 2012).

TELEVISION(CONTENT)

- Devices
  - 97% of the Flemish population has a TV set at home. Nearly 1 in 3 respondents without a TV at home indicates they use another device to watch television programs.
  - The classic tube TV disappears from the Flemish households. Until last year, 1 in 2 households still had a classic tube TV (and possibly also a flat screen TV). Today, only 27% of the Flemish households has an old tube TV, particularly in the population older than 60 years. The proportion of flat screen TVs remains similar to last year (80%).
- Digital television
  - 86% of the Flemish population watches digital TV (via cable, telephone or satellite).

[1] In order to increase the readability, all numbers in this section are rounded to integers.

- Alternative TV platforms such as over-the-top television (4%) and DVB-T antenna's (5%) are emerging. In addition to the saturating digital television, we note that such platforms are not to be considered as an alternative for analogue and/or digital television, but rather as an extra service, next to a digital TV connection.
- Although digital television is becoming increasingly popular in Flanders, this does not reflect in an increased usage of its functionalities. A proportional growth was recorded in merely three applications: using EPG, recording programs and Internet use. This growth is accompanied by an observed 'settling in' period to get started with digital television features: the longer one has digital television at home, the higher the application usage.
- Half of the digital TV viewers skips ads on a daily basis. This makes ad skipping one of the top-applications of digital television. However, some remarks should be made. On the one hand, we see that ad skipping on a daily basis stagnates at 50% (48% in 2012). On the other hand, the majority of the Flemings shows no willingness to pay for skipping ads. For 1 in 5 digital television adopters, this would even be a reason to stop their digital television subscription.
- Besides ad skipping, there are other functionalities that seem to stagnate in terms of (daily) use: requesting free programs, watching pay channels, voting/playing along with TV programs and watching paid previews.
- People in their thirties are the most proficient DTV application users. However, this does not necessarily imply that people in their thirties also show the most audiovisual consumption. Compared to the older age groups, young people (teens and people in their twenties) use other screens more often (especially the computer and smartphone) to view television content.

- Watching television programs
    - 3,6% of the respondents indicate they never watch television content.
    - 56% of those watching television content, watches live linear television on a daily basis. This is a significant decrease compared to last year (71% in 2012). This can be partly explained by the fact that people watch slightly more delayed. Moreover, the longer they have digital television, the more they use these digital television functionalities. However, the main explanation can be found in the observation that the Flemish population increasingly explores other screens and platforms for the consumption of audiovisual content (computer, laptop, tablet, streaming, …).
    - The vast majority of the TV viewers watches 1 to 3 hours per day (56% in week and 51% on weekends).
    - For 42% of the Flemish population the TV set is still the only device used to watch television programs.

- 54% (also) uses other devices: this is often a computer (51%), a tablet (27%) and/or a smartphone (18%).
- 54% of those watching TV consults the Internet while watching TV. Only a minority of them (43%) does so to interact with or regarding the TV content. Especially young people interact with TV content, mostly via smartphone, laptop or tablet. However, the majority uses the Internet while watching TV more as a distraction, rather than an interaction opportunity with the television content.

COMPUTER/INTERNET

- Computer ownership (laptop/desktop) in Flemish households saturates at 92%, while the same applies to Internet access at around 93%.
- Almost 2% of the Flemish population has an Internet connection at home, but no computer. However, a laptop and a desktop are no longer the only devices which can be connected to the Internet. Most of those without a computer but with Internet at home, do have an Internet TV and/or a tablet.
- Less than 1% of the Flemish population has a computer at home but no Internet connection, which confirms a quasi-one-on-one relationship between computer and Internet ownership.
- 6% of the Flemish population neither has a computer at home nor Internet. Usually this involves elderly, retired or lower educated Flemings. “I cannot work with computers and the Internet” is often given as reason for not having these technologies at home.
- In parallel with the TV environment, we also observe a rapid disappearance of ‘the classic screen’ in the computer environment, in this case the desktop. In only 55% of the Flemish households there is a desktop available (compared to 66% in 2012). 14% of the population only has a desktop computer at home.
- The top three daily activities on computer/Internet are e-mail (81%), searching for information (64%) and visiting social media (50%). Besides an increased use of e-mail (+5%), this top 3 daily computer activities is more or less equal to last year.
- Within the various possible computer/Internet activities, there is a striking exploration of over-the-top activities: streaming music (+5.6%), streaming movies/series (+6.8%), and

Skype (+9, 2%). Compared to 2012, the number of Flemings that never did an over-the-top activity before decreased by almost 6%. However, the number of frequent users (at least weekly) of over-the-top activities stagnates. In other words, over-the-top activities are clearly tested, but only a limited group incorporates this in their regular media habits.

- 42% of the computer users already downloaded movies or series. Only 28% of them indicates to have downloaded exclusively legal copies.58% of the computer users already downloaded music. 39% of them downloaded the music completely legally.

Tablet

- Tablet adoption continues to blossom. After the great leap forward in 2012 (from 13% in 2011 to 28% in 2012), the penetration rate now jumps to 41% (+14%).
- Tablets are especially popular among people in their thirties and forties.
- Apple loses market share in the Flemish tablet market, but remains leader. 53% of all tablets in Flanders are iPads, compared to 66% in 2012. 39% of the tablets has an Android operating system.
- Although a tablet can be connected to the Internet in various ways, the wireless network at home/others is the most common way (92% of the tablet owners). Only 15% (also) uses mobile Internet.
- E-mail (59% reading and answering 46%), searching for information (49%) and social media visits (41%) are the most frequent daily activities on the tablet.
- 60% of the tablet owners has paid apps on their tablet. This is 7% more compared to the smartphone.

TELEPHONY

- Surprisingly, fixed telephony holds its ground in increasingly mobile times. 7 out of 10 in the Flemish population still has a fixed phone at home. A possible explanation could be that this service is often part of the popular bundles.
- Mobile telephony in Flanders saturates: 96% of the population has a mobile phone (GSM and/or smartphone).
- 43% of the 4% Flemings without a mobile phone does not want to be accessible “anytime anywhere”.
- The smartphone becomes increasingly popular. With yet again an increase of 10%, almost 1 in 2 Flemings now has a smartphone (48%).
- Nearly 8 in 10 smartphone owners (83%) also has a mobile data subscription. Those without a mobile Internet subscription state they can cope with the WiFi capabilities.
- Unlike the tablet market, Android is, just like last year, the market leader in the smartphone market (53% Android versus 30% iOS). Most notable is the strong growth of the Windows phone (doubled to 9% compared to 2012).
- E-mail (reading 63% and 42% answering), visiting social media (52%) and accessing information (53%) are by far the most frequent daily activities on the smartphone. Compared to last year, the strong increase of Bluetooth usage is notable (20% daily versus 2% daily in 2012).
- 53% of the smartphone owners has paid apps on their smartphone.

BUNDLES

- The Flemish population loves one-stop shops. Packs, shakes and multiple play packages remain very popular. Compared to 2012, we see an increase of 5%, resulting in 66% pack-adopters in Flanders.
- Within this package, the large growth of mobile telephony is remarkable. 34% of the packs contains mobile telephony (compared to 24% in 2012).
- Approximately half of the bundles (45%) consists of 3 services, mainly digital TV, Internet and fixed telephony.

GAMING

- Gaming remains a popular activity amongst the Flemish population: 6 out of 10 Flemings plays a game from time to time (status quo compared to last year).
- Although gaming itself remains popular, it is striking that gamers use less and less dedicated game devices. The computer seems to be the favorite device to play games (44%), followed by the mobile phone (29%) and the tablet (24%). 21% of the population plays on a fixed game console from time to time and 9% on a handheld console.
- The number of Flemings with a console at home (handheld and/or connected to the TV) has decreased by 9% to 31%.
- "Hardcore gaming" (periods longer than 3 hours a day) seems to be the exception, since only 3% of the gamers plays this long during the week, with 5% of the gamers extending their game sessions during the weekend.

TRADITIONAL MEDIA

- RADIO
  - The Flemish population loves the radio medium. 97% listens to the radio from time to time. 1 out of 3 even listens more than 3 hours a day to the radio.
  - The favorite devices to listen to the radio are the radio device at home and in the car (both 87%).
- MUSIC
  - Music is becoming an increasingly online experience: 60% of the Flemish population already used online music channels.
  - 23% of the total population has already paid for digital music (as opposed to 20% in 2012).
  - YouTube appears to be a very popular music channel among the Flemish population, followed by iTunes. Respectively 45% and 29% of the total population already made use of these channels. Young people do this more than older people. The same is true for men compared to women.
- NEWS
  - Radio and television continue to be the most popular media to follow news. 92% of the total population follows the news on the radio from time to time and 91% on the television.
  - For the first time, news sites are more popular than the printed newspaper as daily news source: 43% via news sites versus 39% via the newspaper. News sites are also the only clear climber within the four major news sources (radio, TV, newspaper and news sites).

SOCIAL MEDIA

- 77% of the Flemish population has one or more accounts on social media. Most Flemings have only one account (18%).
- 1 in 5 without an account on social media gives 'concern for their privacy' as a reason why they are not present on social media.
- Facebook remains the undisputed market leader (66%), followed by YouTube (37%), Google+ (35%), LinkedIn (31%) and Twitter (28%).
- Instagram, Pinterest and Foursquare each have about 10% account penetration in Flanders.
- LinkedIn appears the strongest growing network. The LinkedIn share in Flanders grows by almost 10%, totaling to 31% and exceeding the 28% penetration of Twitter accounts.
- In general, the younger age groups are more active on social media than the older age groups.

GENERAL

- Asking the Flemish population the hypothetical question: "Suppose you would buy a new media device in the near future, which device would you prefer?", the tablet seems to be the preferred device (34%), followed by the laptop (32%).
  However, when looking at the different age groups, there is a noticeable difference. The younger (15-29 years old) and the older age groups (60-64 years old) prefer a laptop. The age group 30-59 prefers a tablet.
- Although the tablet has become a very popular device, when asked which device people prefer for different activities, the laptop scores highest. The TV remains the most popular device for watching series, programs and movies.

Results

With Digimeter 2013 (the sixth edition of our survey), we kept the more visual and intuitive approach towards the representation of the Digimeter results. The results are presented in infographics, tables, graphs and selected profiling of adopters and non-adopters of several technologies. The report consists of nine major chapters with a subsequent focus on TV, computer, tablet, telephony, packs, social media sites, playing games, traditional media consumption (radio, music and news consumption) and general media use. Additionally, a poster presenting a general overview of the results is available.

Digimeter comprises a broad diversity of questions, allowing in-depth analyses from different perspectives. For this general Digimeter report the analyses remain rather basic and on a more generic level. For more in-depth analyses the Digimeter dataset and survey are made available for iMinds-researchers. For more information regarding more in-depth analysis on these data, please contact: Lieven De Marez (lieven.demarez@ugent.be) or Dimitri Schuurman (dimitri.schuurman@ugent.be).

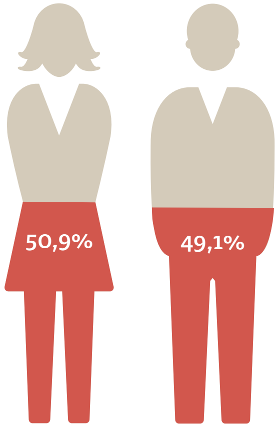
Socio-demographic characteristics

The analyses in this report are based on a representative sample of the Flemish population. Quota on age, gender and region living are based upon the last available statistics (2013)[1]. For a correct interpretation of the results, we will give an overview of these variables.

Gender

Our sample consists of slightly more women (50,9%) than men (49,1%).

Population plotted by gender

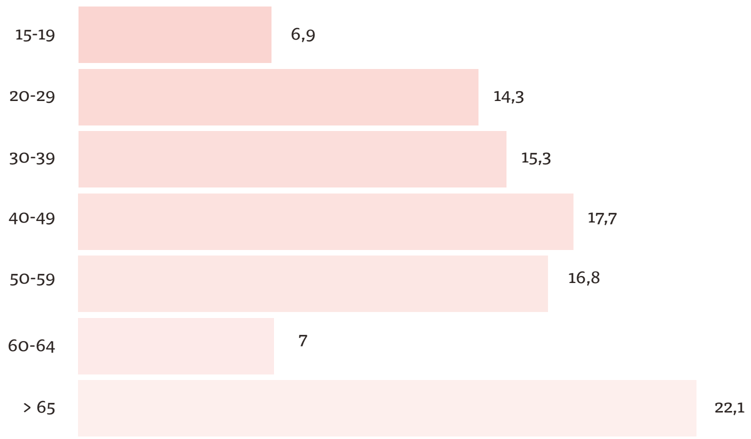


Graph 1: Population plotted by gender (%; N=3.519).

Age categories

The minimum age to participate in the survey is 15 years with no maximum age limit. The oldest age group (65+) is the largest with 22,1%.

Population plotted by age

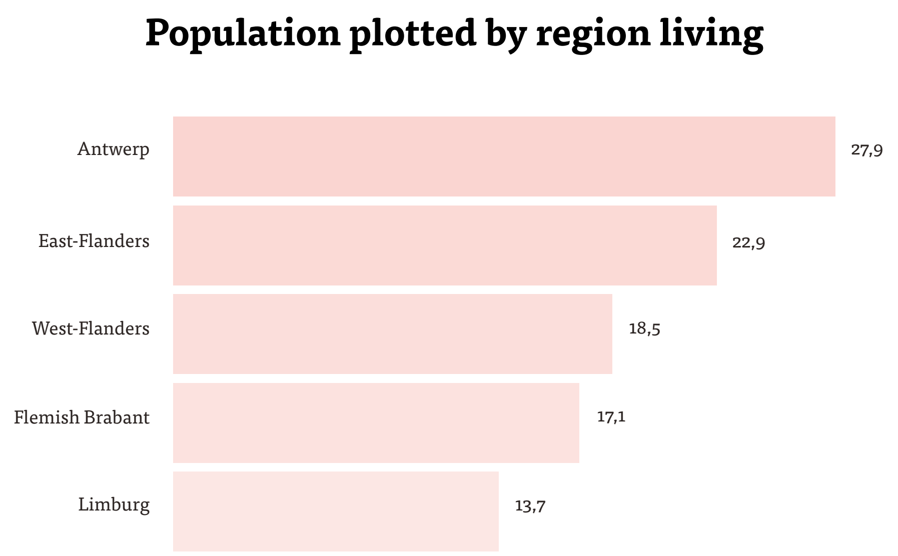


Graph 2: Population plotted by age (%; N=3.519).

[1] The Belgian federal institutes for statistics: Federaal Planbureau; FOD Economie - Algemene Directie Statistiek en Economische Informatie

Region

Antwerp (27,9%) is the most represented region in our sample, followed by East Flanders (22,9%), West Flanders (18,5%), Flemish Brabant (17,1%) and finally Limburg (13,7%).

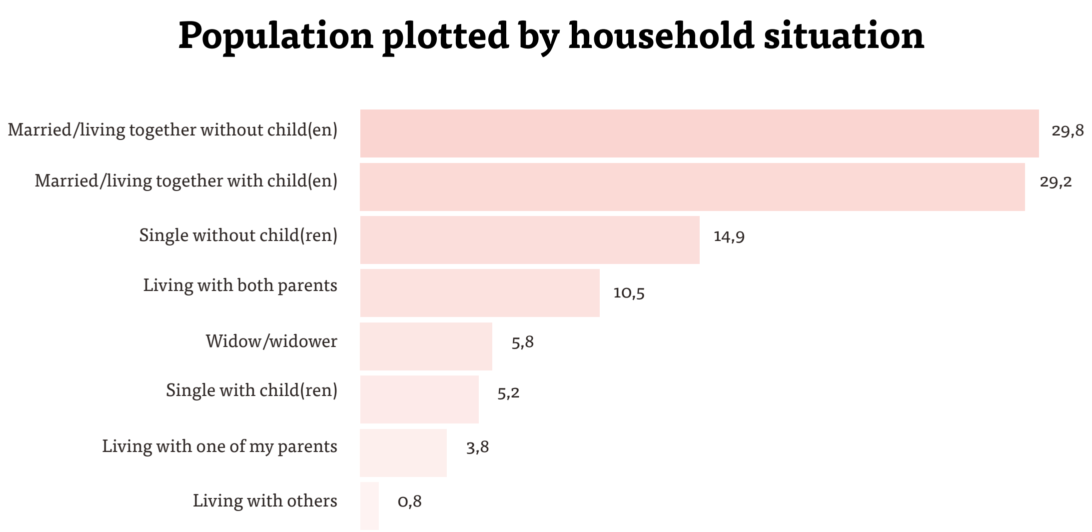


Graph 3: Population plotted by region living (%; N=3.519).

The following socio-demographic characteristics are not taken into account as quota to select a representative sample of the Flemish population.

Household situation

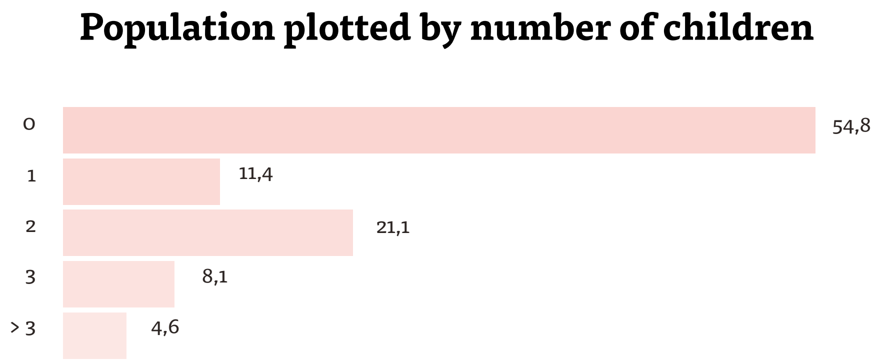
The biggest group in our sample is married or lives together without children (29,8%), followed by those living with their partner and children (29,2%). 14,9% is single without children and 5,2 is single with children. 3,8% lives with one and 10,5% lives with both of his/her parents. 5,8% is widow/widower and 0,8% lives together with other people.



Graph 4: Population plotted by household situation (%; N=3.519).

Number of children

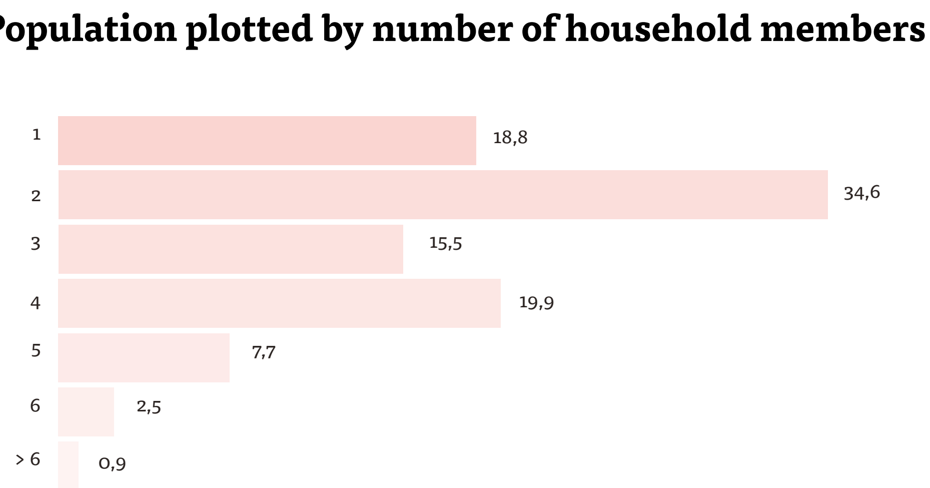
More than half of our sample has no children. About one out of ten (11,4%) has one child. More than one out of five (21,1%) has two children, 8,1% has three children. Having more than three children is rather uncommon (4,6%).



Graph 5: Population plotted by number of children (%; N=3.519).

Household members

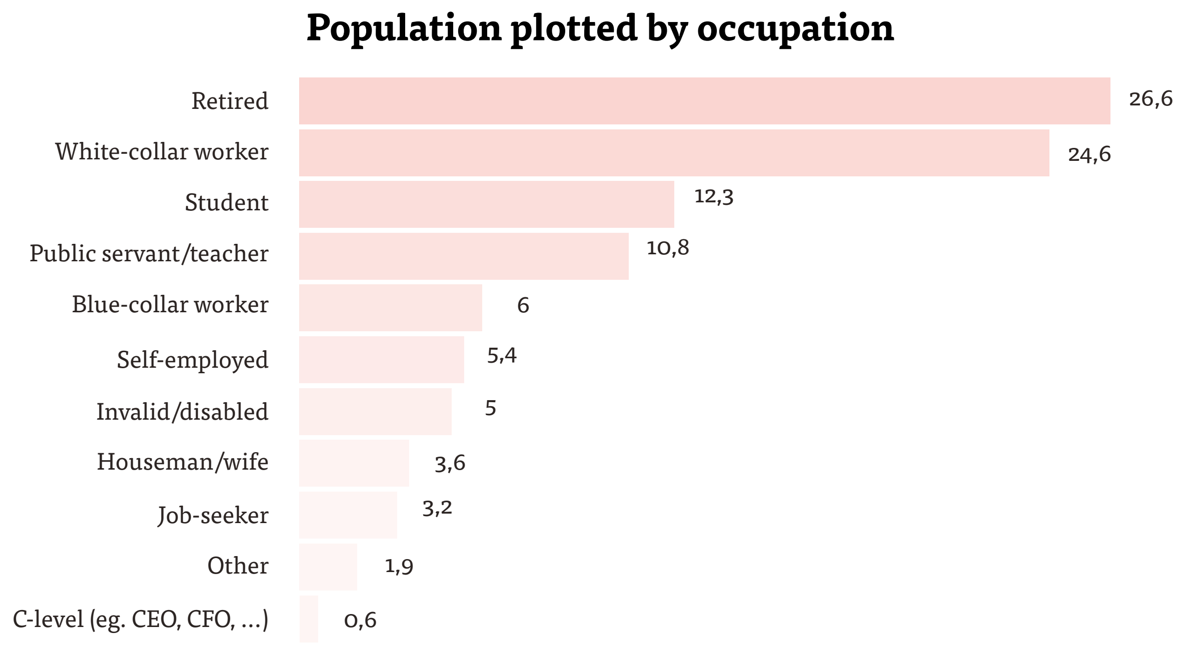
Most households consist of two members (34,6%), followed by four members (19,9%). 18,8% of the respondents live on their own and 15,5% has two other household members. Families with 6 members (2,5%) and more than 6 members (0,9%) are rare.



Graph 6: Population plotted by number of household members (%; N=3.519).

Occupation

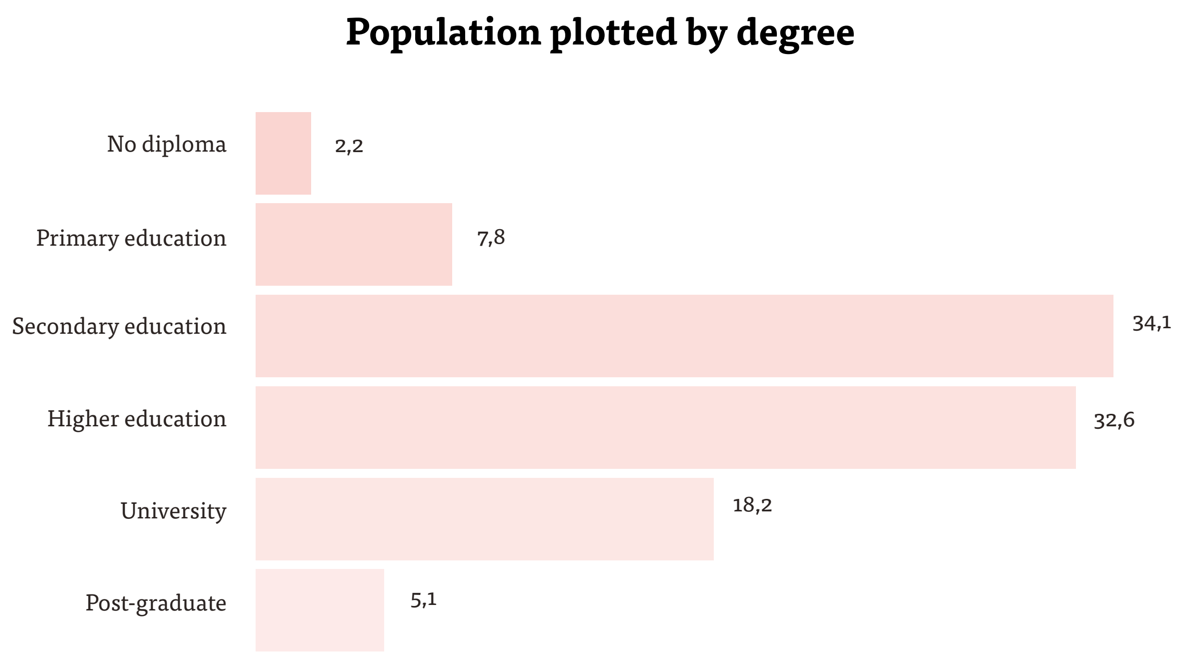
Retired (26,6%) and clerk (24,6%) and are the two most common occupational groups in our sample. 12,3% is still studying.



Graph 7: Population plotted by occupation (%; N=3.519).

Degree

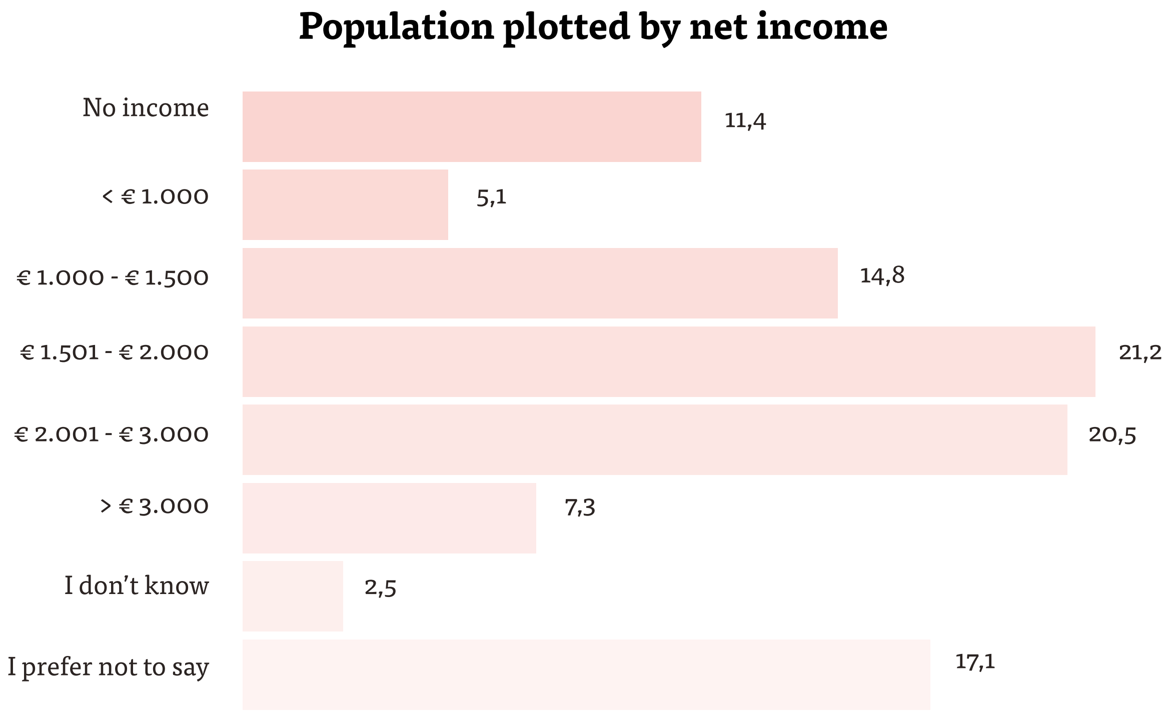
The vast majority of our sample has a secondary degree (34,1%). 32,6% has a higher degree and 23,3% of our sample has a university degree or higher. About 10% is lower educated (2,2% no diploma and 7,8% primary education).



Graph 8: Population plotted by degree (%; N=3.519).

Net income

Most people (21,2%) of our sample have an income between €1.501 and €2.000. 11,4% has no income which may be (partly) related to the 12,3% students in our population. Low and very high incomes are rather exceptional (5,1% and 7,3%). We have no data on one out of five respondents (2,5% 'I don't know' and 17,1% 'I prefer not to say').



Graph 9: Population plotted by net income (%; N=3.519).

Chapter 1: TV

1

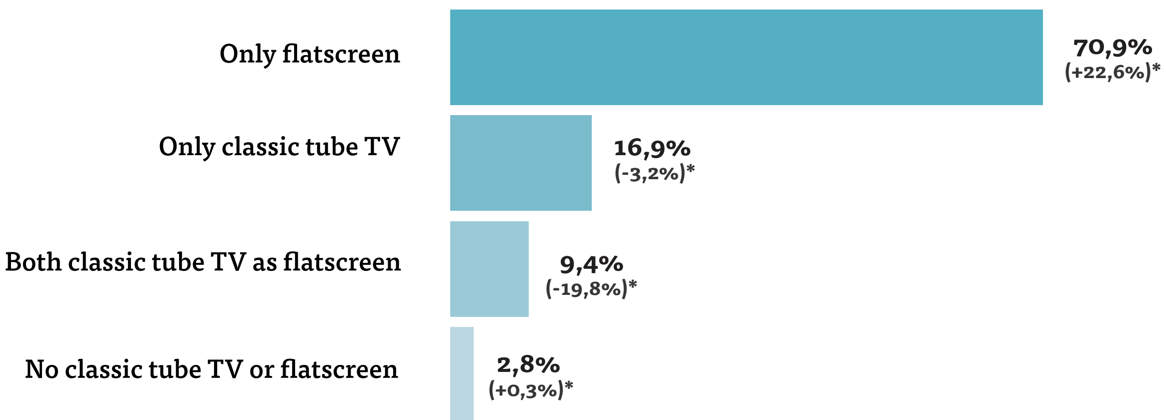
1. TV

General facts & figures (N=3.519):

- 97,2% of the Flemish households has a TV set at home:
  - Classic tube TV: 26,3% (-23%)*
  - Flatscreen: 80,3% (+2,8%)*
- Beamer: 4,6% (-0,8%)*

- More and more people seem to get rid of their old classic tube TV as their number has greatly reduced, while the number of flatscreens remained virtually the same. However, 16,9% still has a classic tube TV as primary TV set.
- Because of the previous finding, the number of people having both a flatscreen as well as a classic tube TV strongly decreased. Only 9,4% of the population has both types, while last year this was still 29,2%.
- Almost half of those with only a classic tube TV is of the older age category (43,6% is 60 years and older).

TV equipment: flatscreen versus classic tube TV



Graph 10: TV equipment: flatscreen versus classic tube TV (%; N=3.519).

[1] Numbers with * report the evolution with regard to the previous wave.

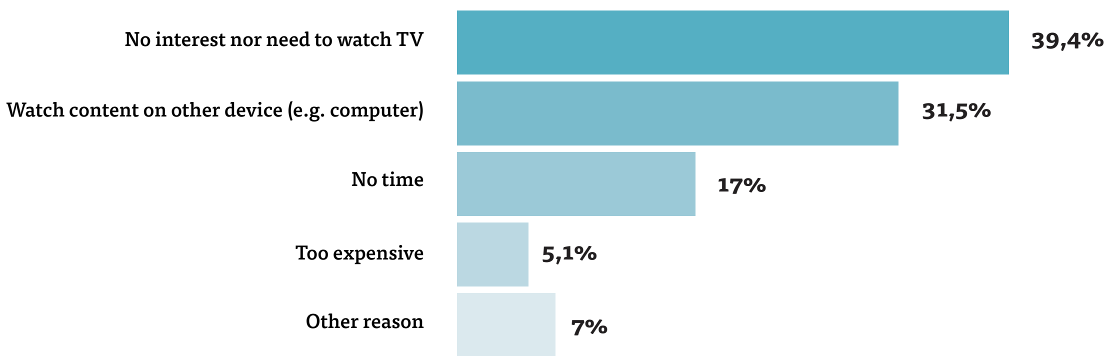
Classic tube TV as main screen plotted by age

	15-19	20-29	30-39	40-49	50-59	60-64	65+
Only classic tube TV	3%	11,1%	15,8%	14,3%	12,2%	3,7%	39,9%

Table 1: Classic tube TV as main screen plotted by age (%; N=596).

- A minority of 2,8% (+0,3%)* does not have a TV set at home. From this group, the largest part (39,4%) does not feel the need or interest to watch TV. However, one out of three (31,5%) without a TV set at home does watch TV content on another screen like a computer or tablet. Last year, this number was only 21,7% (+9,8%)*. However, in absolute numbers, this trend is still insignificant.

Main reason for not having a TV set at home



Graph 11: Main reason for not having a TV set at home (%; N=85).

2. Digital TV

- 86% of the total population has digital TV by cable and/or telephone line and/or satellite[2] (+3,9%)*.
- The majority has digital TV via cable (62,8%) or telephone line (21,8%).
- Just over one out of five Flemings still uses analogue TV by cable (20,9%). 7,8% of the total population has only analogue TV and 13,1% is still using the analogue TV connection on top of his/her digital TV connection.
- Most people adopted digital TV more than one year ago, only 2,3% did this during the last six months.
- The rise of digital TV does not mean that other TV connections have disappeared. Alternative TV connections are mostly used as a complement to a digital connection, as 61,2% of those with a DVB-T antenna and 85,6% of those with over-the-top-television, also have a digital TV connection (by cable or telephone line).

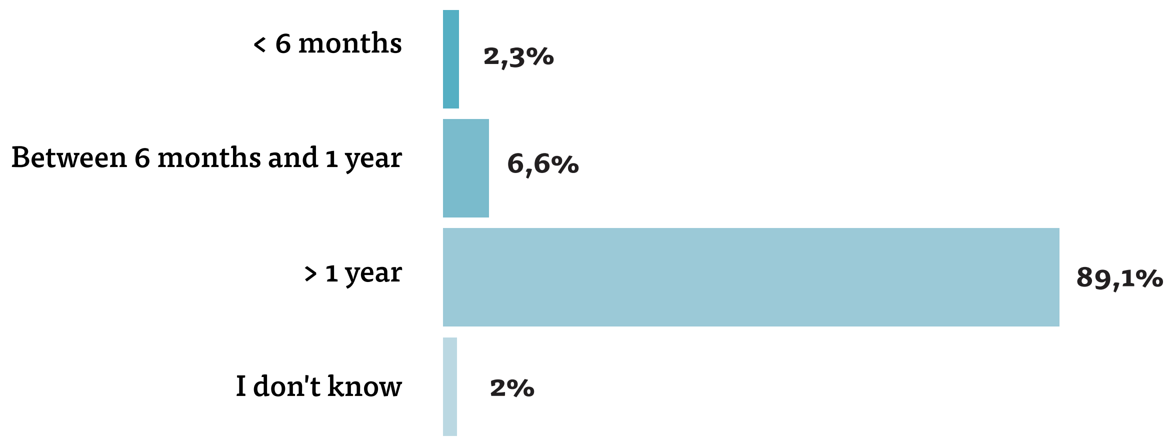
TV connections

	Percent
Digital TV by cable (Telenet)	**62,8**
Digital TV by telephone line (Belgacom, SNOW)	**21,8**
Analogue TV by cable	**20,9**
DVB-T antenna	**5,1**
Digital TV by satellite (eg. TV Vlaanderen)	**4,0**
Over-the-top television (eg. WeePee)	**3,8**
None of the above	**1,8**

Table 2: TV connections (%; N=3.519).

[2] A small number of the population (2,6%) has more than one digital television connection, which explains why 62,8% + 21,8% +4% does not equal 86%.

Adoption of digital TV outlined in time



Graph 12: Adoption of digital TV outlined in time (%; N=3.025).

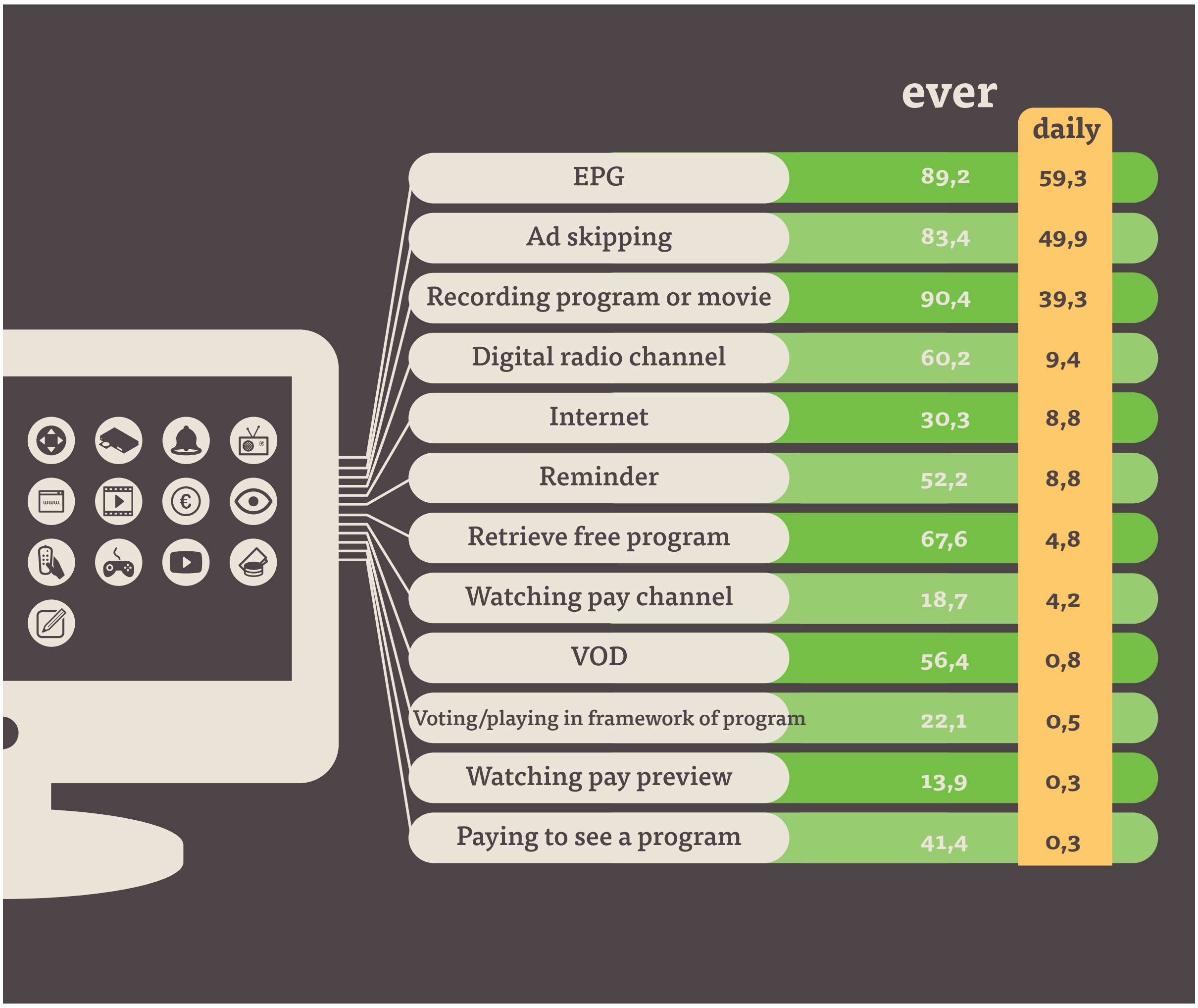
Combination DTV with other TV connections

	DTV
DVB-T antenna (N=178)	**61,2%**
Over-the-top television (N=132)	**85,6%**

Table 3: Combination DTV with other TV connections (%).

- The most popular daily used functionality on digital TV is consulting the EPG (59,3%). This function was already the most popular in the two previous waves and this has increased even more with an additional 5,1% consulting the EPG on a daily base. The percentage of DTV owners not using the EPG dropped from 17% to 10,8%. Ad skipping (49,9%) and recording (39,3%) are also popular daily used features of digital TV owners.
- Contrary to the steady growth of DTV adoption or ownership in Flanders, this growth is not mirrored in the use of all the digital television functionalities. Only for three applications show a similar growth in (daily) usage: EPG, recording a program or movie and Internet.
- Ad skipping via digital television is more or less stagnating compared to last year (48% of the digital TV owners skip ads on a daily base in wave 5, versus 49,9% of the digital TV owners daily in wave 6), just as retrieving free programs (4,3 % daily wave 5 versus 4,8% daily wave 6), watching pay channels (4,9% daily wave 5 versus 4,2% daily wave 6), watching paying previews (0,2% daily wave 5 versus 0,3% daily wave 6). However, for ad skipping, last year there were 6% more people that had never used the ad skipping functionality before.
- Similar to last year, paying for DTV applications (watching pay channels, paying to see a program, ...) still remains far less common. Almost half of the DTV owners (41,4%) has already paid to see a program, but on a daily basis this number drops to less than 1%. The same is true for video on demand: 56,4% has already used this feature while only 0,8 uses this daily. Only 13,9% has already watched paying previews and 18,7% has already watched pay channels.
- The longer people have used DTV, the more they use the various features and applications. For watching paying previews and pay channels the difference is not significant. For using the Internet, we see a reversed use pattern: people that recently adopted DTV seem to make more use of the Internet functionality on DTV. However these results are also not significant.
- In general, it seems that the use of the digital TV functionalities decreases with age. For example, 58,4% of the age group 15-19 uses the reminder function, whereas only 47,3% of the age group 60-64 does. The youngest age group (15-19 years old) is most proficient in using the Internet, watching previews and pay channels via digital TV. The age group 20-29 uses the recording functionality the most and, remarkably, the age group 30-39 has the highest percentages for reminder, EPG, digital radio channels, VOD, retrieving a free program, paying to see a program, and ad skipping.

The use of different functionalities on digital TV



Infographic 2: The use of different functionalities on digital TV (%; N=3.025).

Seldom to daily use of DTV applications plotted by time people already have DTV

	Total	< 6 months	> 1 year
Reminder (p=.000)	52,2%	37,7%	**53,9%**
EPG (p=.000)	89,2%	82,9%	**90,5%**
Voting/playing in framework of program (p=.006)	22,1%	13,0%	**23,0%**
Digital radio channel (p=.000)	60,2%	55,7%	**61,9%**
Internet (p=.071)	30,2%	33,3%	30,8%
VOD (p=.000)	56,4%	30,4%	**58,9%**
Retrieve free program (p=.000)	67,6%	56,5%	**69,6%**
Paying to see a program (p=.000)	41,4%	18,8%	**43,6%**
Watching paying preview (p=.369)	13,9%	8,7%	14,2%
Watching pay channels (p=.195)	18,7%	17,1%	19,2%
Recording program or movie (p=.000)	90,5%	79,7%	**91,8%**
Ad skipping (p=.000)	83,4%	65,7%	**84,6%**

Table 4: Seldom to daily use of DTV applications plotted time people already have DTV (%; N=3.025).

Seldom to daily use of DTV applications plotted by age respondent

	Total	15-19	20-29	30-39	40-49	50-59	60-64	65+
Reminder (p=.000)	52,2%	**58,4%**	52,7%	**63,5%**	56,4%	55,3%	47,3%	38,2%
EPG (p=.000)	89,2%	**94,5%**	**96,8%**	**97,9%**	**94,9%**	**93,6%**	84,2%	70,6%
Voting/playing in framework of program (p=.000)	22,1%	19,5%	16,7%	**26,6%**	**29,2%**	24,9%	23,3%	14,8%
Digital radio channel (p=.000)	60,1%	**65,0%**	**69,3%**	**75,1%**	**66,2%**	61,9%	47,3%	41,3%
Internet (p=.000)	30,2%	**38,4%**	25,4%	31,9%	34,2%	34,0%	31,1%	22,8%
VOD (p=.000)	56,4%	**70,8%**	**69,8%**	**76,0%**	**67,8%**	57,4%	44,1%	24,8%
Retrieve free program (p=.000)	67,5%	67,7%	**76,8%**	**82,1%**	**75,2%**	**71,7%**	63,1%	44,5%
Paying to see a program (p=.000)	41,4%	**49,5%**	**46,8%**	**57,0%**	**51,9%**	42,6%	34,1%	18,4%
Watching paying preview (p=.000)	13,9%	**22,3%**	12,4%	18,1%	18,4%	15,1%	9,9%	6,0%
Watching pay channels (p=.000)	18,7%	**33,2%**	20,4%	**24,0%**	22,1%	17,7%	15,8%	8,5%
Recording program or movie (p=.000)	90,4%	**96,3%**	**96,8%**	**96,7%**	93,5%	94,3%	88,3%	75,8%
Ad skipping (p=.000)	83,4%	89,0%	89,6%	**92,8%**	87,7%	85,7%	80,3%	67,8%

Table 5: Seldom to daily use of DTV applications plotted by age respondent (%; N=3.025).

- Ad skipping is a frequently used feature on digital TV (49,9% daily). During 2013, a debate took place in the Flemish media whether people would be willing to pay for ad skipping. When given the option, most of the respondents choose not to pay for ad skipping. 20,6% would even stop their digital TV subscription if ad skipping would become an extra cost.

Willingness to pay for ad skipping

	Percent
Current price without ability to skip ads	45,9
Stop digital TV subscription	20,6
At extra cost with the ability to skip ads	18,3
At a smaller extra cost with a limited ability to skip ads	15,2

Table 6: Willingness to pay for ad skipping (%; N=3.025).

3. Watching TV content

- The majority of the population watches TV content from time to time (96,4%).
- The most popular device for doing this remains the TV set, as 88% of all Flemish people indicates to watch TV content on a TV. One out of two (50,5%) sometimes watches TV content on a computer (laptop or desktop) and one out of four (26,6%) on a tablet. Almost one out of five watches TV content on a smartphone, while the beamer is not a very popular device for watching TV content.
- 42% of the total population only watches TV content on their TV set. That means that more than half of our sample (54,4%) watches TV content on more than one device. 29,4% watches TV content on two devices, mostly a TV set and a computer. 16,4% also watches TV content on a tablet. 8,6% watches TV content on at least four devices.
- More than half of those watching TV content, watches one to three hours a day (55,8% during the week and 50,7% during the weekend).
- There is not much difference in frequency of watching TV during the week (98,9%) and weekend (98,5%). However, people seem to watch longer periods in the weekend than in the week (30,3% versus 20% watching more than three hours a day).

Regularly watching TV content on different devices

	Percent
TV	88
Laptop or desktop	50,5
Tablet	26,6
Smartphone	18,4
Beamer	1,4
I never watch TV content	3,6

Table 7: Regularly watching TV content on different devices (%; N=3.519).

Number and type of devices used to watch TV content

Number	%	Type
0	3,6	
1	42,0	Mostly tv
2	29,4	Mostly TV, laptop/desktop
3	16,4	Mostly TV, laptop/desktop, tablet
4	8,3	Mostly TV, laptop/desktop, tablet, smartphone
5	0,3	TV, laptop/desktop, tablet, smartphone, beamer

Table 8: Number and type of devices used to watch TV content (%; N=3.519).

Frequency of watching television

	Week	Weekend
Never	1,1	1,5
< daily	8,8	6,5
< 1 hour a day	14,3	11
1 - 3 hours a day	55,8	50,7
> 3 hours a day	20	30,3

Table 9: Frequency of watching television (%; N=3.394).

Watching television

	Percent
Watching TV during the week	98,9
Watching TV during the weekend	98,5

Table 10: Watching television (%; N=3.394).

- More and more TV shows stimulate their public to interact with and react on TV programs by means of other screen or Internet applications. However, similar to last year, our data reveal that this is not very common yet. About half of the sample watching TV content does not use the Internet while watching TV content (46,2%). For those using the Internet while they are watching TV, their motivation is rather to distract from the content (84,2%), than to interact with the content (43,4%) [3].
- Only 9% of all the TV viewers uses the Internet to give their opinion or talk about a program and 4,6% uses the Internet to vote or play along with the program. When looking at the age of these people, especially the younger age group uses the Internet to give their opinion or talk about a program (32,2% of them is younger than 30 years old). For voting or playing along with a program, there is no significant age difference.
- Mobile devices are the most popular to interact with a TV program. 62,7% uses a mobile phone, 61,6% a laptop and 51,4% a tablet to give their opinion or talk about a program while watching TV. The most common channel used are social media (91,4%).

Using Internet while watching TV

	Percent
For a reason not related to the program	84,2
To search for additional pictures of information about the current program	22,5
To browse to the site of the program	16,7
To give opinion or talk about a program	16,7
To be able to vote/play along with the program	8,6

Table 11: Using Internet while watching TV (%; N=1.815).

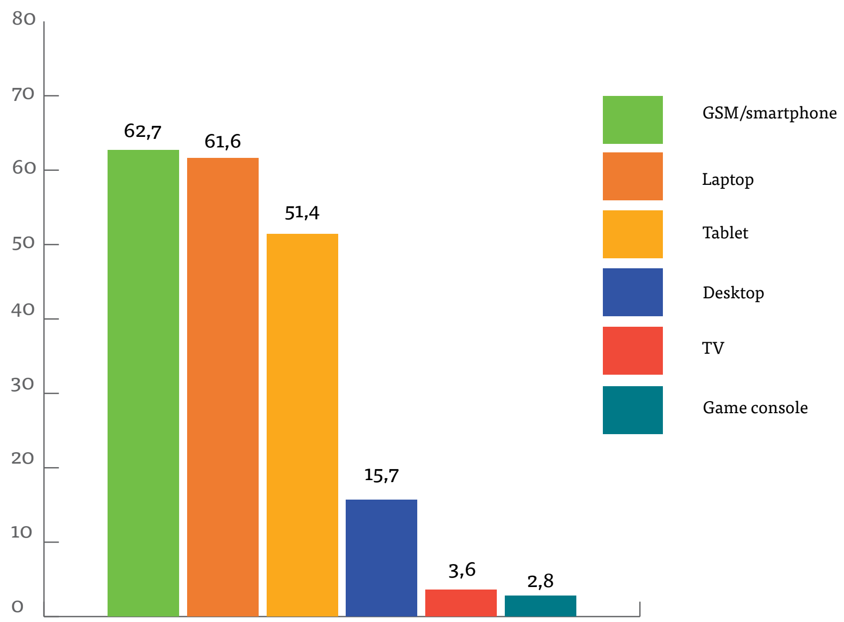
[3] Respondents could give multiple interaction motives, which explains why 22,5% + 16,7% +16,7% +8,6% does not equal 43,4%.

Interaction with TV content plotted by age respondent

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
To give opinion or talk about a program (p=.000)	16%	16,2%	12,3%	8,5%	4,2%	4,4%	4,9%	**9%**
To be able to vote/play along with the program (p=.310)	4,6%	5,5%	5,6%	5,4%	3%	3,6%	4,2%	**4,6%**

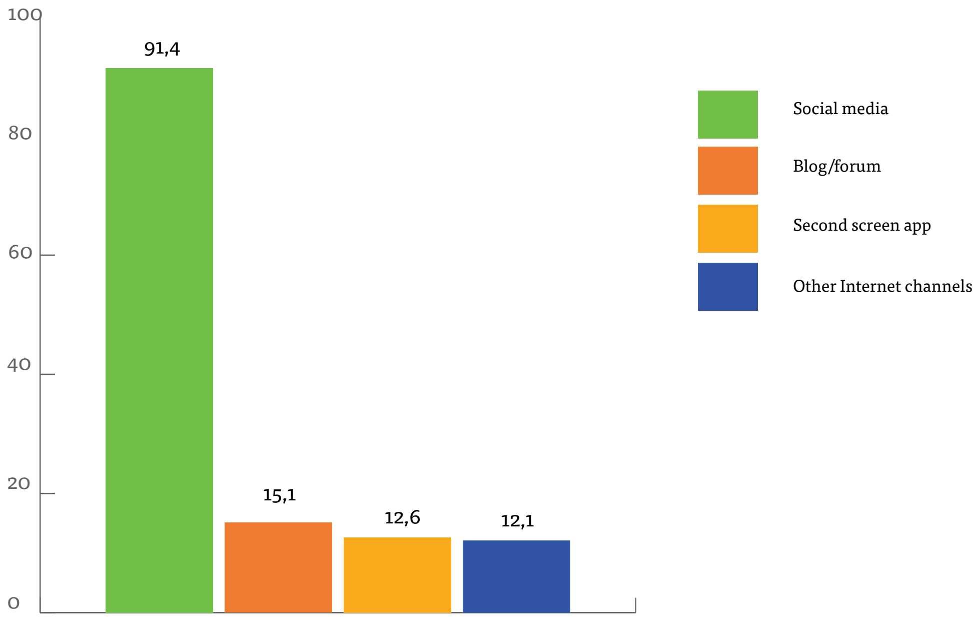
Table 12: Interaction with TV plotted by age respondent (%; N=3.373).

Using Internet on different devices to give opinion or talk about a program while watching TV



Graph 13: Using Internet on different devices to give opinion or talk about a program while watching TV (%; N=302).

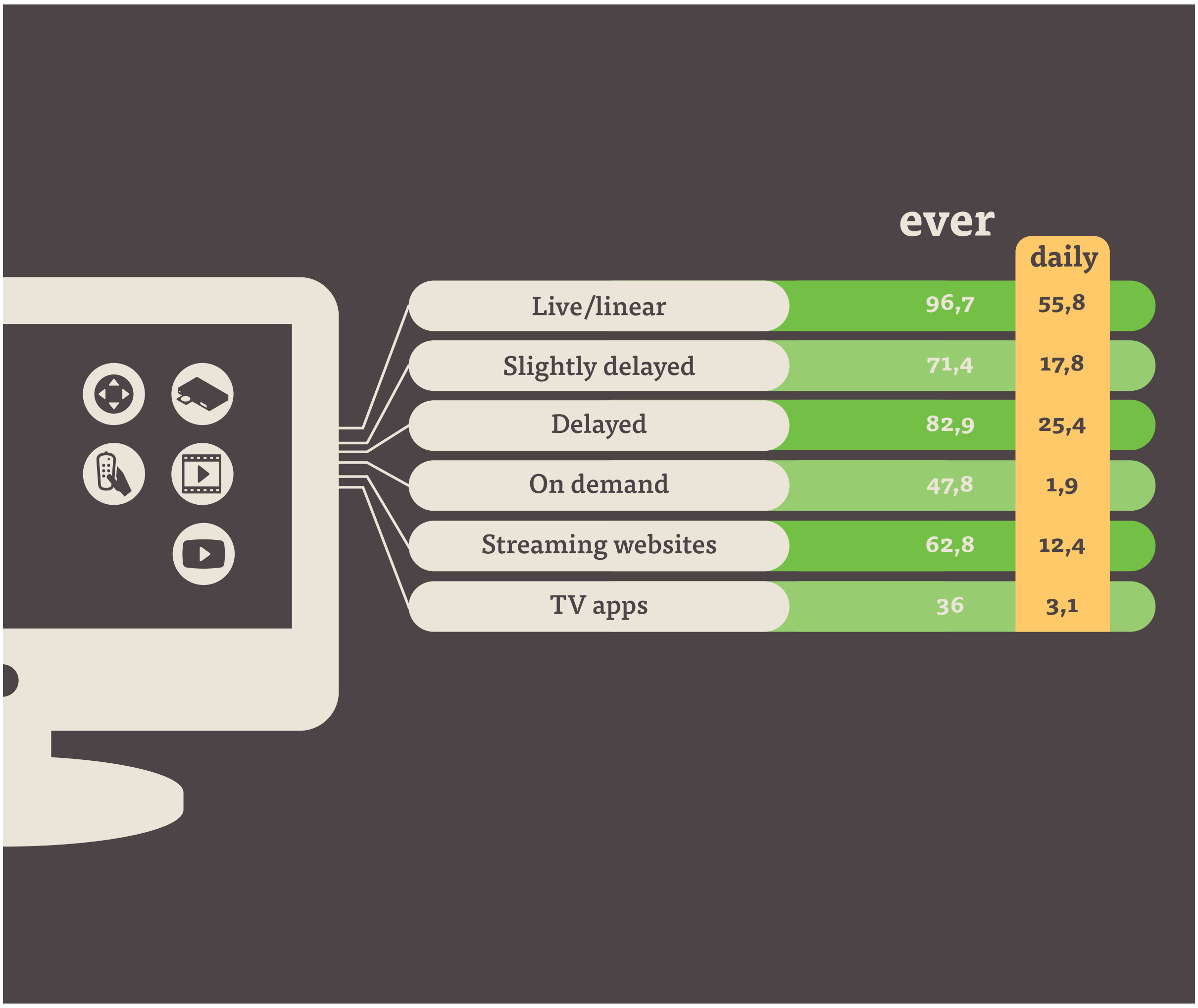
Different channels to give opinion or talk about a program while watching TV



Graph 14: Different channels to give opinion or talk about a program while watching TV (%; N=302).

- Digital TV makes it possible to watch TV content in different ways. In the previous wave, 70,7% of the digital TV owners indicated they watch linear TV daily. In this wave this is reduced to 55,8%.
- The longer people have digital TV, the more they watch (slightly) delayed or on demand.
- The younger people also seem to watch more (slightly) delayed than the older age groups. 92% of the 15-19 years old watches TV delayed and 83,5% of them watches slightly delayed (see table 13: Seldom to daily watching TV plotted by age respondent). These are significant higher percentages than those of the total population. The same is true for VOD, streaming websites and using TV apps.

Watching TV content



Infographic 3: Watching TV content (%; N=3.373).

Seldom to daily watching TV plotted by time people already have DTV

	< 6 months	> 1 year	Total
Live (p=.699)	98,4%	97,9%	**97,9%**
Slightly delayed (p=.000)	68,3%	81,4%	**79,3%**
Delayed (p=.000)	80,6%	91,7%	**90,4%**
On demand (p=.000)	34,9%	55,6%	**53,2%**
Streaming websites (p=.000)	74,6%	64,2%	**62,8%**
TV apps (p=.000)	27,4%	41,3%	**39,5%**

Table 13: Seldom to daily watching TV plotted by time people already have DTV (%; N=2.938).

Interaction with TV content plotted by age respondent

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Live (p=.005)	95,8%	95,1%	95,6%	96,9%	96,0%	99,1%	98,5%	**96,7%**
Slightly delayed (p=.000)	**83,5%**	75,3%	**77,6%**	**80,7%**	74,8%	70,5%	50,1%	**71,4%**
Delayed (p=.000)	**92,0%**	87,0%	85,5%	**88,4%**	85,6%	84,9%	68,0%	**82,9%**
On demand (p=.000)	49,6%	49,5%	**60,3%**	**60,2%**	50,4%	44,9%	25,7%	**47,9%**
Streaming websites (p=.000)	**79,4%**	**89,0%**	**84,8%**	**74,3%**	53,4%	52,4%	24,3%	**62,8%**
TV apps (p=.000)	**47,7%**	42,6%	51,7%	46,3%	30,2%	27,2%	15,1%	**36,0%**

Table 14: Seldom to watching TV plotted by age respondent (%; N=3.373).

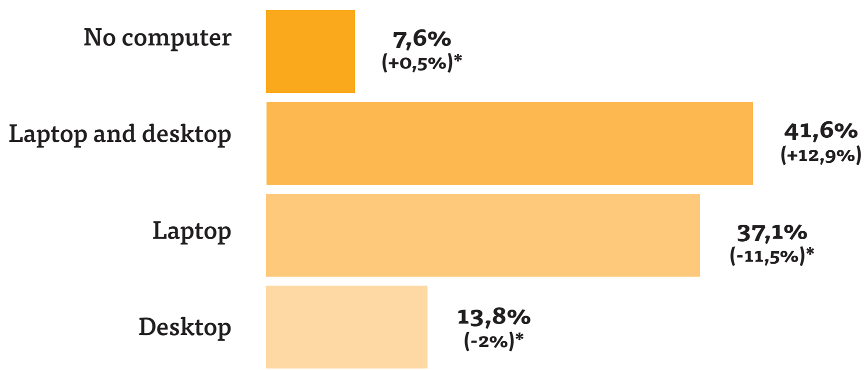
Chapter 2: Computer

1. Computer

General facts & figures (N=3.519):

- 92,4 % of the Flemish households has a computer at home (+0,5%)*:
  - Laptop: 78,7% (-1,4%)*
  - Desktop: 55,3% (-11,1%)*
- More than four out of ten (41,6%) has a laptop as well as a desktop.

Computers: laptop versus desktop computer



Graph 15: Computers: laptop versus desktop computer (%; N=3.519).

- 7,6% of the Flemish households has no computer at home.
- About four out of ten people without a computer (44,1%) state they can't work with a computer, while 34,9% indicates to have no interest in computers. 16,7% has someone else doing computer related things for them. For 12,1%, computers are too expensive and 12,1% uses a computer elsewhere.

Reasons for not having a computer at home

	Percent
I can't work with a computer	44,1
I'm not interested in computers	34,9
Someone else does computer related things for me	16,7
Computers are too expensive	13,3
I use elsewhere a computer	12,1
I don't need to use a computer (at home)	6
I don't have the time to use a computer	4,1
Computers are outdated fast	3,7

Table 15: Reasons for not having a computer at home (%; N=267).

- The profile of the computer owner (laptop or desktop) strongly resembles the profile of the total population. Only the retired and people aged 65+ seem to be less presented in the group owning a computer.
- On the other hand, people without a computer differ significantly. Women, housemen/wives, retired and lower educated people, people with lower income, widowers and people older than 65 are more likely to have no computer at home.

Profiling of computer adopters and non-adopters

	No computer (N=267)	Computer (N=3.252)	Total (N=3.519)
Gender (p=.000)			
Men	24,0%	51,2%	49,1%
Women	76,0%	48,8%	50,9%
Profession (p=.000)			
Student	0,8%	13,2%	12,3%
Job-seeker	2,3%	3,3%	3,2%
Blue-collar worker	4,1%	6,1%	6,0%
White-collar worker	1,9%	26,5%	24,6%
Public servant/teacher	2,3%	11,5%	10,8%
Invalid/disabled	2,3%	5,3%	5,0%
C-level	0,0%	,6%	,6%
Self-employed	0,4%	5,9%	5,5%
Houseman/wife	8,3%	3,2%	3,6%
Retired	76,7%	22,5%	26,6%
Other	1,1%	1,9%	1,8%
Diploma (p=.000)			
No diploma	8,6%	1,7%	2,2%
Primary education	33,7%	5,7%	7,8%
Secondary education	43,1%	33,4%	34,1%
Higher education	9,7%	34,5%	32,6%
University	3,4%	19,4%	18,2%
Postgraduate	1,5%	5,4%	5,1%

	No computer (N=267)	Computer (N=3.252)	Total (N=3.519)
Family situation (p=.000)			
Single without child(ren)	14,2%	15,0%	15,0%
Single with child(ren)	5,2%	5,3%	5,3%
Married/living together without child(ren)	30,3%	29,7%	29,8%
Married/living together with child(ren)	17,2%	30,1%	29,2%
Living with both parents	0,4%	11,3%	10,5%
Living with one of my parents	0,0%	4,1%	3,8%
Living with others	,7%	,8%	,8%
Widow/widower	31,8%	3,7%	5,8%
Age categories (p=.000)			
15 - 19	0,8%	7,4%	6,9%
20 - 29	1,1%	15,3%	14,3%
30 - 39	3,0%	16,3%	15,3%
40 - 49	3,4%	18,8%	17,7%
50 - 59	7,9%	17,5%	16,8%
60 - 64	3,0%	7,3%	7,0%
> 65	80,8%	17,3%	22,1%
Income (p=.000)			
No income	5,7%	11,9%	11,4%
< 1000	12,5%	4,5%	5,1%
1000 - 1500	27,5%	13,8%	14,8%
1501 - 2000	8,3%	22,3%	21,2%
2001 - 3000	6,8%	21,6%	20,5%
> 3000	3,0%	7,6%	7,3%
I do not know	4,2%	2,4%	2,5%
I prefer not to say	32,1%	15,9%	17,1%

Table 16: Profiling of computer adopters and non-adopters (%).

- 93,1% of the population has an Internet connection at home.
- Less than 1% has a computer but no Internet connection at home. 6% has nor a computer, nor Internet at home.
- There are slightly (but not significant) more people with an Internet connection at home than people with a computer (laptop and/or desktop) at home (93,1% versus 92,4%). However, the computer is not the only device that can be connected to the Internet. 34,2% of the group with Internet but without a computer at home, has a flatscreen TV that can be connected to the Internet and 33% has a tablet.

Computer and Internet possession at home

	Internet	No Internet
No computer at home	1,6%	6%
Computer at home	91,5%	0,9%

Table 17: Computer and Internet possession at home (%; N=3.519).

Possession of other Internet devices of those without a computer but with Internet at home

	Percent
Flatscreen TV connected to the Internet	34,2
Tablet	33,0
Smartphone	19,0
Fixed game console	5,5
Handheld game console	2,0

Table 18: Possession of other Internet devices of those without a computer but with Internet at home (%; N=57).

- Of the 6,9% not having an Internet connection at home, 15,4% had one in the past.
- Those without an Internet connection at home give 'Not able to work with the Internet' (41,3%) or 'no interest' (35,3%) as the two main reasons for not having an Internet connection.

Reasons for not having an Internet connection at home

	Percent
I can't work with the Internet	41,3
I'm not interested in the Internet	35,3
I don't need to use the Internet (at home)	16,1
Someone else does Internet related things for me	16,1
Internet is too expensive	14
I use elsewhere the Internet	12,4
Due to privacy reasons	4,1
I don't have the time to use the Internet	4,1

Table 19: Reasons for not having an Internet connection at home (%; N=243).

- The profile of people with/without an Internet connection at home strongly resembles the profile of those with/without a computer at home.
- The profile of the Internet adopters strongly resembles the profile of the total population. Only the retired and people aged 65+ seem to be less represented in the group with an Internet connection at home.
- The profile of non-adopters differs significantly from the profile of the total population. Women, housemen/wives, retired and lower educated people, singles without children, widowers and people older than 65 are more likely to have no Internet connection at home.

Profiling of Internet adopters and non-adopters

	No Internet (N=243)	Internet (N=3.276)	Total (N=3.519)
Gender (p=.000)			
Men	22,6%	51,1%	49,1%
Women	77,4%	48,9%	50,9%
Profession (p=.000)			
Student	1,2%	13,1%	12,3%
Job-seeker	2,1%	3,3%	3,2%
Blue-collar worker	6,2%	6,0%	6,0%
White-collar worker	1,6%	26,3%	24,6%
Public servant/teacher	1,6%	11,5%	10,8%
Invalid/disabled	2,1%	5,3%	5,0%
C-level	0,0%	,6%	,6%
Self-employed	0,4%	5,8%	5,5%
Houseman/wife	11,1%	3,1%	3,6%
Retired	72,4%	23,2%	26,6%
Other	1,2%	1,9%	1,9%
Diploma (p=.000)			
No diploma	9,5%	1,7%	2,2%
Primary education	34,2%	5,8%	7,8%
Secondary education	41,2%	33,6%	34,1%
Higher education	10,7%	34,2%	32,6%
University	2,9%	19,3%	18,2%
Postgraduate	1,6%	5,3%	5,1%

	No Internet (N=243)	Internet (N=3.276)	Total (N=3.519)
Family situation (p=.000)			
Single without child(ren)	19,7%	14,6%	15,0%
Single with child(ren)	7,0%	5,1%	5,3%
Married/living together without child(ren)	27,9%	29,9%	29,8%
Married/living together with child(ren)	13,5%	30,3%	29,2%
Living with both parents	0,4%	11,2%	10,5%
Living with one of my parents	0,4%	4,1%	3,8%
Living with others	0,0%	,8%	,8%
Widow/widower	31,1%	3,9%	5,8%
Age categories (p=.000)			
15 - 19	0,4%	7,3%	6,8%
20 - 29	1,6%	15,2%	14,3%
30 - 39	2,0%	16,3%	15,3%
40 - 49	6,1%	18,5%	17,7%
50 - 59	10,7%	17,2%	16,8%
60 - 64	4,1%	7,2%	7,0%
> 65	75,0%	18,2%	22,1%
Income (p=.000)			
No income	6,2%	11,8%	11,4%
< 1000	9,5%	4,7%	5,1%
1000 - 1500	26,3%	14,0%	14,8%
1501 - 2000	8,2%	22,2%	21,2%
2001 - 3000	7,0%	21,5%	20,5%
> 3000	3,3%	7,6%	7,3%
I do not know	4,9%	2,4%	2,5%
I prefer not to say	34,6%	15,8%	17,1%

Table 20: Profiling of Internet adopters and non-adopters (%).

- 92,7% of the population uses a computer, at home or elsewhere. 6,6% of the total population has no computer at home and does not use a computer elsewhere. 0,7% has a computer at home, but does not use the computer him/herself.
- The non-users are mainly of the older age groups. 27,5% of them is older than 65.
- There is not much difference in frequency of using the computer during the week (92,5%) or weekend (92%). However, people seem to use their computer for longer periods of time in the weekend than during the week (21,6% versus 16% using the computer more than three hours a day).

Relation between having a computer and using a computer

	Not using a computer	Using a computer
No computer at home	6,6%	0,9%
Computer at home	0,7%	91,8%

Table 21: Relation between having a computer and using a computer (%; N=3.519).

Frequency of using a computer

	Week	Weekend
Never	7,5	8
< daily	7	6,7
< 1 hour a day	21,9	18,6
1 - 3 hours a day	47,6	45,2
> 3 hours a day	16	21,6

Table 22: Frequency of using a computer (%; N=3.519).

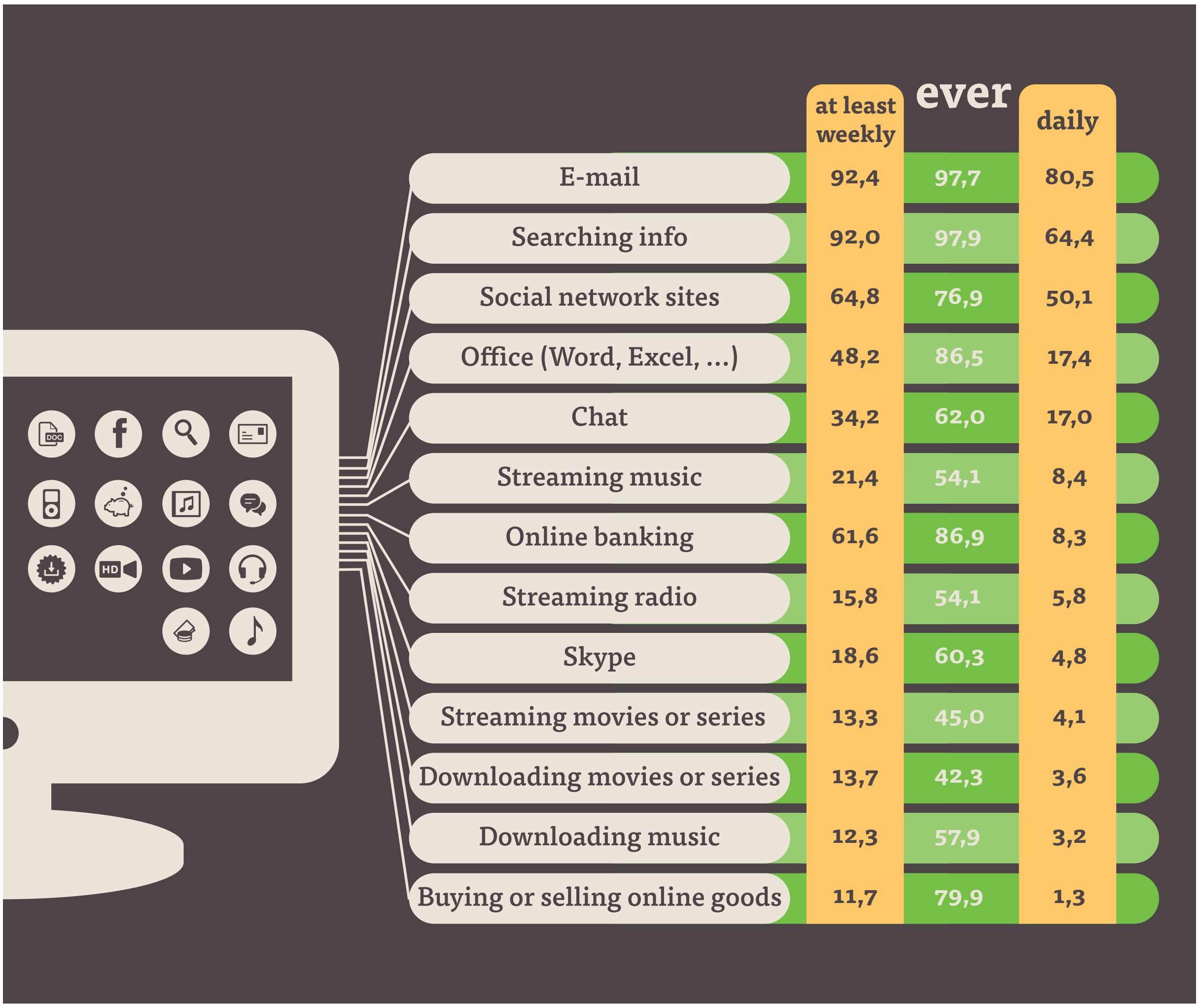
Using a computer

	Percent
Using computer during the week	**92,5**
Using computer during the weekend	**92**
Using computer	**92,7**

Table 23: Using a computer (%; N=3.519).

- Generally, the use of the different Internet functionalities decreases with age.
- The top daily activities on the computer/Internet are e-mail (80,5%), searching information (64,4%) and visiting social network sites (50,1%). Besides a stronger use of e-mail (+5,3%), the top 3 of daily computer activities remains more or less status quo compared to last year.
- Streaming music and movies/series is a more common daily activity than downloading music and movies/series (music: 8,4% versus 3,2% - movies/series: 4,1% versus 3,6%)
- The experience with over-the-top activities increases. Compared with last year, the number of people that has ever used their computer for over-the-top streaming activities has increased (Skype +9,2%, streaming movies/series +6,8%, streaming music +5,6%)*. However, the number of very frequent users stagnates.
- E-banking and e-commerce are also becoming more popular. 61,6% uses their computer at least weakly for online banking and about 80% already bought/sold goods online.

Internet activities of computer users



Infographic 4: Internet activities of computer users (%; N=3.262).

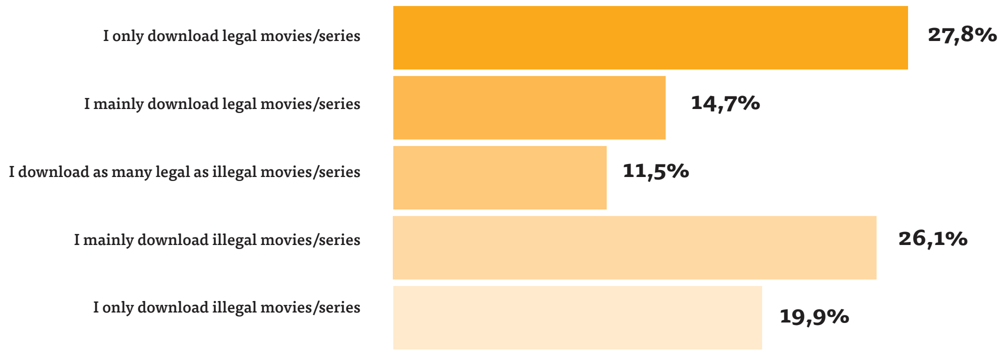
Internet activities of computer users: evolution Digimeter 2012 - Digimeter 2013

	Never	Seldom	Montly	Weekly	Daily
E-mail	-1,9	-0,6	0,4	-3,2	5,3
Searching information	-0,5	-0,9	-0,8	3,6	-1,4
Social network sites	-3,4	-0,1	1,0	3,8	-1,4
Office (Word, Excel, ...)	-4,1	3,2	0,1	3,1	-2,3
Chat	-3,6	-0,2	0,9	3,2	-0,3
Streaming music	-5,6	4,1	2,8	0,4	-1,7
Online banking	-4,4	0,1	4,0	0,6	-0,3
Skype	-9,2	2,8	2,0	4,2	0,2
Streaming movies or series	-6,8	8,3	1,2	-2,0	-0,6
Downloading movies or series	-0,7	1,9	-0,5	0,4	-1,1
Downloading music	-2,4	3,9	1,4	-1,7	-1,3
Buying or selling online goods	-8,7	2,5	5,1	1,2	-0,1

Table 24: Internet activities of computer users: evolution Digimeter 2012 (N=2.463) - Digimeter 2013 (N=3.262) (%).

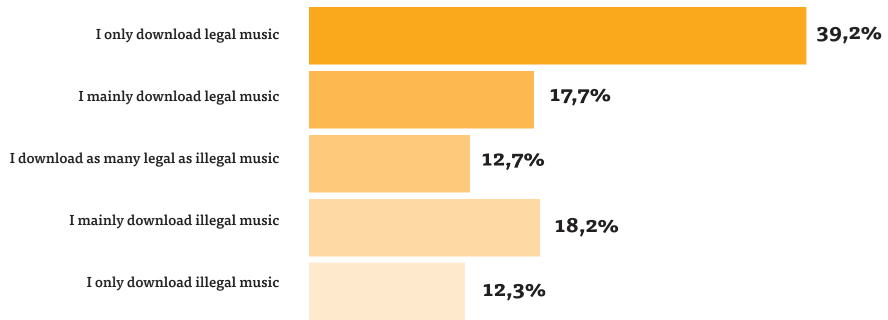
- 72,2% of those downloading movies and/or series states to download those illegally once in a while. Especially the younger people are overrepresented within this group (15-39 years old). There is no significant difference between men and women.
- 60,8% of music downloaders states to download illegally once in a while. Especially the two youngest age groups are overrepresented within this group (15-29 years old). Besides that, there are slightly more men than women in the illegal downloading music group.

Downloading movies and series: legal versus illegal



Graph 16: Downloading movies and series: legal versus illegal (%; N=1.380).

Downloading music: legal versus illegal



Graph 17: Downloading music: legal versus illegal (%; N=1.888).

- The majority of people not using a computer is not familiar with common computer programs. Word processing programs like Word are the most well-known by non-computer users.
- People not using a computer are also not very familiar with Internet functionalities. Search engines are the best known.

Familiarity with computer functionalities of those not using a computer

	I don't know	I know	Already used
Word processing	76,5	15	8,4
Spreadsheets	81,7	14,6	3,7
Presentation programs	86	11,8	2,2
Photo editing programs	80,3	15,5	4,2

Table 25: Familiarity with computer functionalities of those not using a computer (%; N=257).

Familiarity with Internet functionalities of those not using a computer

	I don't know	I know	Already used
Search engine	65,7	20,7	13,6
Online banking	72,9	21,3	5,7
Make online phone calls	83,2	12,8	4
Chat	79,5	18,9	1,6
Online video channel	77,6	19,6	2,8
Online photo channel	83,6	15,2	1,2
Social media	73,1	24,9	2
Buying or selling online goods	76,6	20,9	2,5

Table 26: Familiarity with Internet functionalities of those not using a computer (%; N=257).

Chapter 3: Tablets

General facts & figures (N=3.519):

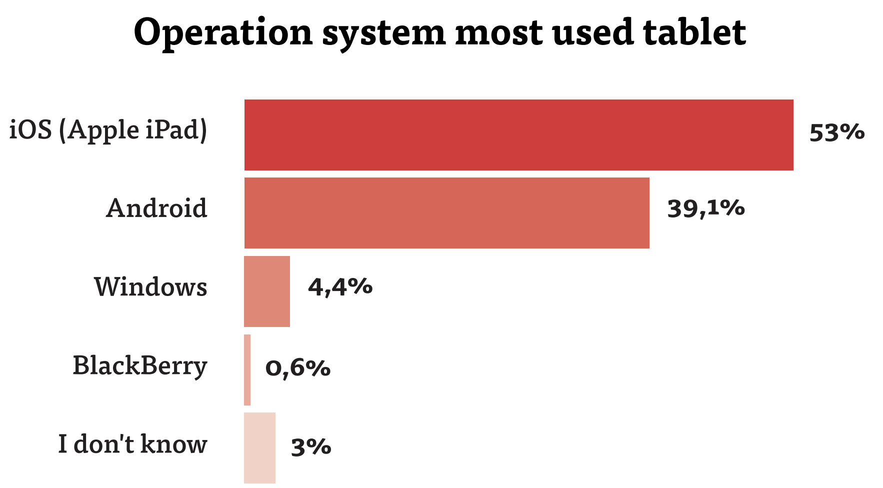
- The tablet hype is still ongoing. After the great leap forward in 2012 (+14,6% to 27,7%), we notice a similar increase in adoption in 2013 to 41,4% (+13,7%)*.
- 6,6% of the total sample not owning a tablet has the intention to buy one within a year. The highest purchase intention is among the existing tablet owners to buy an additional tablet (7,8% among households with tablet versus 6,6% among households without tablet). These figures are similar to those of last year.

Purchase intention to buy a tablet this year

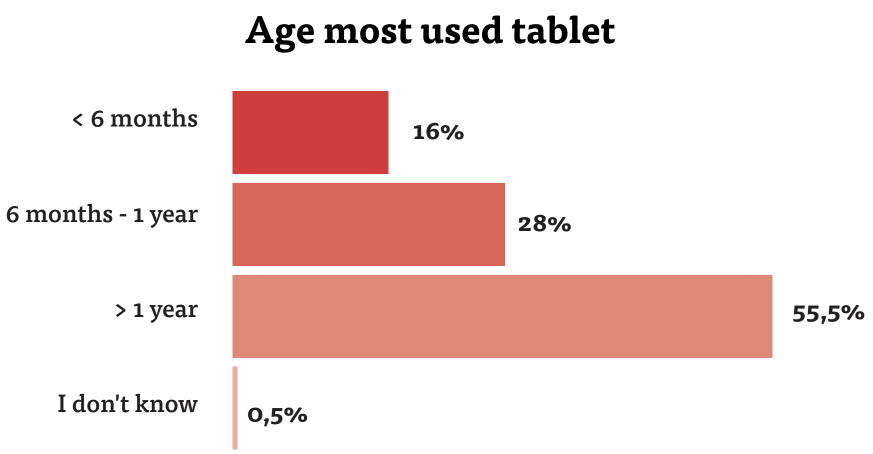
	Already has a tablet (N=1.456)	No tablet (N=2.064)
Yes	7,8%	6,6%
I doubt	12,4%	21,6%
No	79,9%	71,8%

Table 27: Purchase intention to buy a tablet this year (%).

- 53% of all the tablets are iPads. This implies a decrease of 13% compared to last year when 66% of all tablets were iPads. With 39,1%, Android tablets are clearly catching up on Apple within the tablet market in Flanders.
- More than half of all the tablets are older than one year (55,5%).



Graph 18: Operation system most used tablet (%; N=1.455).



Graph 19: Age most used tablet (%; N=1.455).

2. Using tablet

- In the total sample there are 41,4% tablet owners.
- A minority of the tablet owners (2,1%) states to never use his/her tablet. In most of the cases, the tablet is not even used by others.
- There is not much difference between the use of the tablet during the week (97,3%) and weekend (96,6%). As with watching TV and using a computer, people seem to use their tablet for longer periods in the weekend than in the week (9,3% versus 5,3% using the tablet more than three hours a day).

Using a tablet

	Percent
Using tablet during the week	**97,3**
Using tablet during the weekend	**96,6**
Using tablet	**97,9**

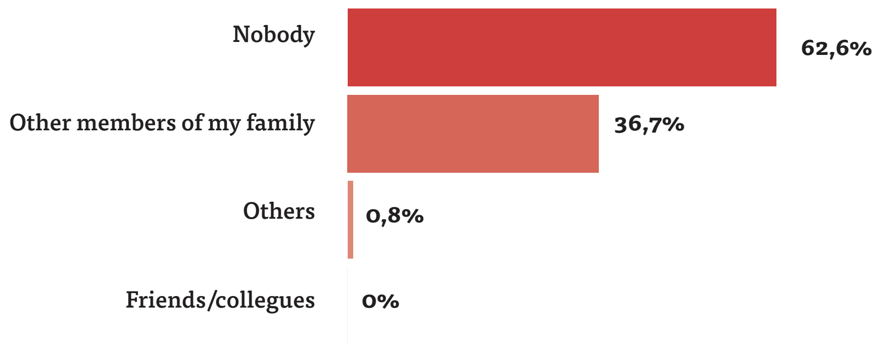
Table 28: Using a tablet (%; N=1.455).

Frequency of using a tablet

	Week	Weekend
Never	**2,7**	**3,4**
< daily	**19,6**	**16,7**
< 1 hour a day	**35,9**	**29,9**
1 - 3 hours a day	**36,5**	**40,7**
> 3 hours a day	**5,3**	**9,3**

Table 29: Frequency of using a tablet (%; N=1.455).

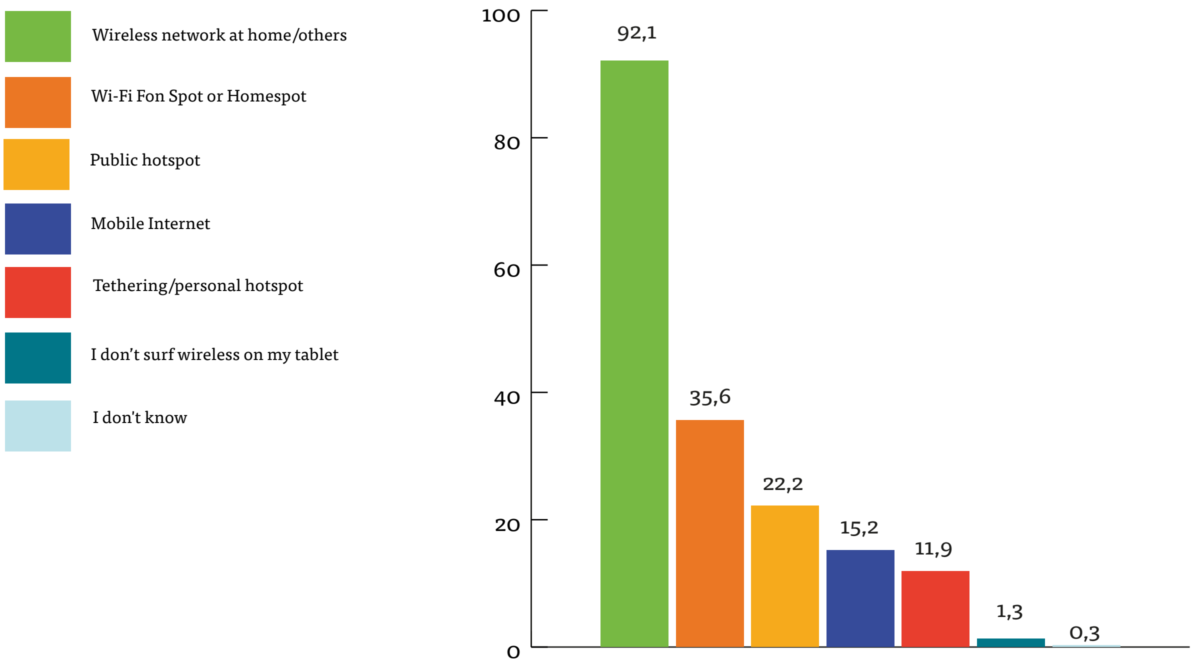
Who's using the tablet if the respondent never does?



Graph 20: Who's using the tablet if the respondent never does? (%; N=31).

- Nearly all tablet users connect their tablet to the Internet, mostly by means of the wireless network at home or at others. In addition, Wi-Fi Fon spots (35,6%) and public hotspots (22,2%) are frequently used.
- E-mail (58,7% reading and 46,3% sending), searching for information (49%) and consulting social media (40,8%) are the most popular daily activities on the tablet. Similar to last year, downloading movies and series is the least frequent activity on the tablet (81,2% never).
- The only remarkable difference in regular usage (at least monthly) since last year, is the drop of reading digital books (-6,6%)* and office applications (-8%)*. On the other hand, regular chatting on the tablet increased with 6,3%.
- When considering the age of the tablet user, we can conclude that activities related to image and sound (downloading and streaming music, radio and movies) and chat/skype are less and less common with older age groups.

Surfing wireless on tablets



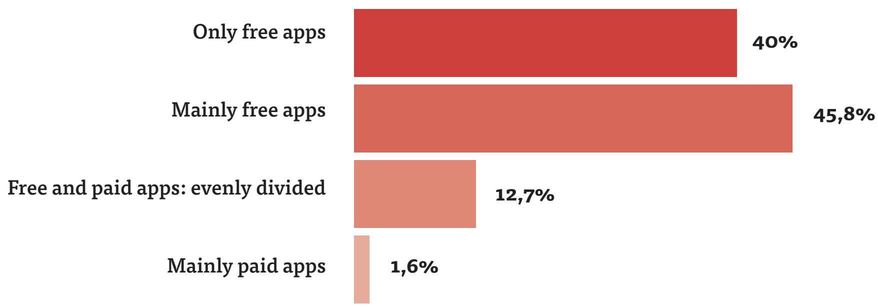
Graph 21: Surfing wireless on tablets (%; N=1.424).

Activities on the tablet

Infographic 5: Activities on the tablet (%; N=1.424).

- 60% of all tablet users has paid apps on their tablet. These figures are roughly in line with the data from the question on how often people install paid apps on their tablet (cfr infographic 5: activities on the tablet: 59,6% ever).
- Taking age into account, we can say that the age group of 30-49 years old has the most paid apps on their tablet.

Free applications versus paid applications on the tablet



Graph 22: Free applications versus paid applications on the tablet (%; N=1.424).

3. Profiling of tablet adopters and non-adopters

- Tablet users are more likely to be male, and to belong to 30-49 age category. They are more likely to be a white-collar worker or invalid/disabled. Owning a tablet is also related to the education level and income: those having a higher education or university degree and having an average to high income are more likely to have one.
- The group not owning a tablet consists more out of women, retired people and and people aged 65 and above.

Profiling of tablet adopters and non-adopters

	No tablet (N=2.063)	Tablet (N=1.456)	Total (N=3.519)
Gender (p=.000)			
Men	42,9%	58,0%	49,1%
Women	57,1%	42,0%	50,9%
Profession (p=.000)			
Student	13,0%	11,3%	12,3%
Job-seeker	3,6%	2,7%	3,2%
Blue-collar worker	6,5%	5,3%	6,0%
White-collar worker	20,4%	30,7%	24,6%
Public servant/teacher	9,6%	12,4%	10,8%
Invalid/disabled	3,3%	7,5%	5,0%
C-level	,0%	1,4%	,6%
Self-employed	3,8%	7,8%	5,5%
Houseman/wife	5,2%	1,2%	3,6%
Retired	32,5%	18,1%	26,6%
Other	2,0%	1,6%	1,9%
Diploma (p=.000)			
No diploma	2,6%	1,6%	2,2%
Primary education	10,0%	4,6%	7,8%
Secondary education	37,8%	29,0%	34,1%
Higher education	29,9%	36,6%	32,7%
University	16,0%	21,4%	18,2%
Postgraduate	3,8%	6,9%	5,1%

	No tablet (N=2.063)	Tablet (N=1.456)	Total (N=3.519)
Family situation (p=.000)			
Single without child(ren)	16,6%	12,5%	14,9%
Single with child(ren)	6,1%	4,1%	5,2%
Living together without child(ren)	29,1%	30,7%	29,8%
Living together with child(ren)	23,7%	36,9%	29,2%
Living together with both parents	10,9%	9,8%	10,5%
Living together with one parent	4,0%	3,5%	3,8%
Living together with others	1,1%	,4%	,8%
Widow/widower	8,4%	2,1%	5,8%
Age categories (p=.000)			
15 - 19	6,3%	7,7%	6,9%
20 - 29	15,0%	13,3%	14,3%
30 - 39	12,0%	19,9%	15,3%
40 - 49	13,1%	24,1%	17,6%
50 - 59	17,5%	15,8%	16,8%
60 - 64	7,6%	6,3%	7,0%
> 65	28,6%	13,0%	22,1%
Income (p=.000)			
No income	12,9%	9,2%	11,4%
< 1.000	6,2%	3,5%	5,1%
1.000 - 1.500	16,7%	12,1%	14,8%
1.501 - 2.000	19,8%	23,3%	21,2%
2.001 - 3.000	18,4%	23,4%	20,5%
> 3.000	4,7%	11,0%	7,3%
I do not know	2,9%	2,1%	2,5%
I prefer not to say	18,4%	15,4%	17,1%

Table 30: Profiling of tablet adopters and non-adopters (%).

Chapter 4: Telephony

4

General facts & figures (N= 3.519):

- 95,8 % of the Flemish people has a mobile phone (+0,6%)*.
  - GSM: 62,4% (-10,5%)*
  - Smartphone: 47,6% (+9,1%)*
  - GSM and smartphone: 14,2% (-2%)*
- 71,3% of the Flemish households has a fixed telephone line (-1,4%)*.

- About seven out of ten has a fixed phone line at home. Mainly retired people and people aged 50 are overrepresented in this group.
- 4,2% does not have a mobile phone (N=149). 'Not wanting to be accessible anytime and anywhere' seems to be the main reason why they don't have a mobile phone (43,2%). A minority of 6,3% is worried about their health.

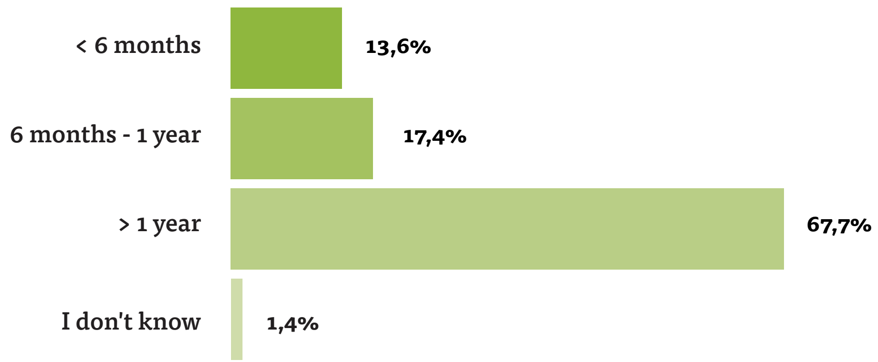
Main reasons for not having a mobile phone

	Percent
I don't want to be accesible anytime, everywhere	43,2
I always use my fixed telephone line	28
I don't need a telephone	12,9
I can't work with a mobile phone	10,7
If necessary, I use a mobile from someone else	9,1
A mobile phone is too expensive	6,4
I'm worried about my health	6,3
Other reason	9,2

Table 31: Main reasons for not having a mobile phone (%; N=149).

- Most mobile phones are older than one year (67,7%).
- Proximus is the dominant Telco provider in our sample (38,9%), followed by Mobistar (22,1%).

Age most used mobile phone



Graph 23: Age most used mobile phone (%; N=3.370).

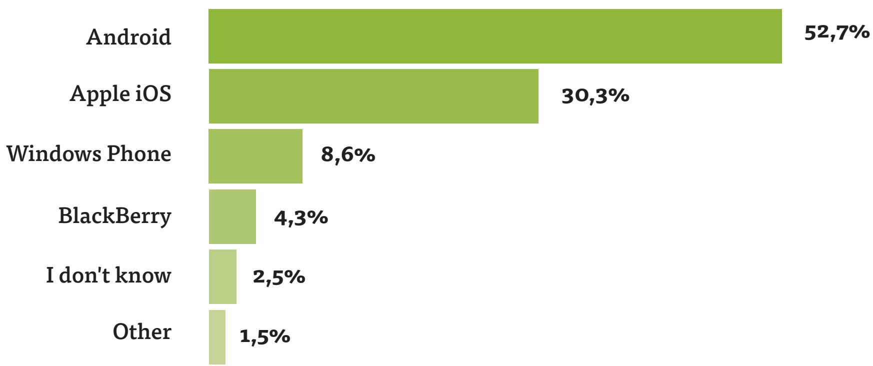
Telco provider mobile phone

	Percent
Proximus	**38,9**
Mobistar	**22,1**
Telenet	**18,1**
Base	**8,3**
Mobile Vikings	**7,5**
Other	**4,7**
JimMobile	**0,5**

Table 32: Telco provider mobile phone (%; N=3.370).

- Similar to last year, Android is the dominant operating system for smartphones (52,7%), whereas Apple's iOS still leads for tablets (cf. chapter 3). Compared to last year, the most noticeable trend is Windows almost doubling its share (+4,2%)*.

Operation system most used smartphone



Graph 24: Operation system most used smartphone (%; N=1.675).

- In comparison to last year, the number of smartphones has increased significantly to 47,6% (+9,1%)*, while the number of data subscriptions increased to 39,7% (+4%)*. This means that 82,9% of the smartphone adopters has a mobile data subscription.
- 69,3% of the smartphone adopters uses mobile Internet to surf on their smartphone. The majority of the smartphone adopters (also) uses the wireless network at home or at others (85,1%). A minority of 4,2% indicates not to surf on the Internet with their smartphone.
- A minority of the smartphone adopters does not have mobile Internet, mostly because they only use Wi-Fi. For one out of four without mobile Internet, mobile Internet is too expensive (24,6%).

Surfing wireless on the smartphone

	Percent
Wireless network at home/at others	85,1
Mobile Internet	69,3
Wi-Fi Fon Spot	43,7
Public hotspot	40,1
Tethering/personal hotspot	5,5
I don't surf wireless on my smartphone	4,2
I don't know	0,4

Table 34: Surfing wireless on the smartphone (%; N=1.675).

Main reason for not having mobile Internet

	Percent
I only use Wi-Fi	41,9
Mobile Internet is too expensive	24,6
I do not need be able to surf anywhere and always	17,7
I don't use Internet on my smartphone	5,3
Other reason	10,5

Table 33: Main reason for not having mobile Internet (%; N=497).

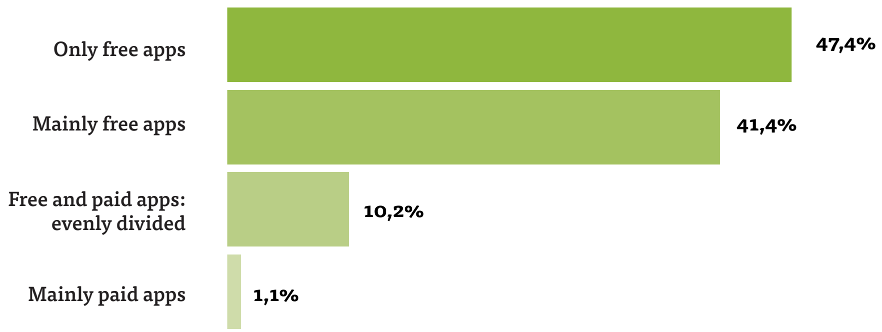
- The top four of daily activities for smartphone users remained unchanged to last year: reading e-mails (62,7%), visiting social media (51,8%), searching for information (42,6%) and sending e-mails (42%).
- The least popular activities on the smartphone are buying/selling online goods (71,1% never), online banking (65,2% never) and reading digital books or magazines (62,1% never).

Activities on the smartphone

Infographic 6: Activities on the smartphone (%; N=1.605).

- 52,6% of the smartphone owners has paid apps on their smartphone. Similar to what we noticed in the chapter on tablets, these figures are roughly in line with the data from the question how often people install paid apps on their smartphone (See infographic 6: activities on the smartphone: 50,5% ever).
- The age group 30-49 years old owns the most paid apps on their smartphone.
- About half of the smartphone adopters has only free apps on their phone (47,4%).

Free applications versus paid applications on the smartphone



Graph 25: Free applications versus paid applications on the smartphone (%; N=1.605).

- The prototype of smartphone owners is male,under 50 and with a higher income.
- Women, retired people and the oldest age groups (60+) are overrepresented in the group without smartphone.

Profiling of smartphone adopters and non-adopters

	No smartphone (N=1.844)	Smartphone (N=1.675)	Total (N=3.519)
Gender (p=.000)			
Men	38,5%	60,8%	49,1%
Women	61,5%	39,2%	50,9%
Profession (p=.000)			
Student	8,5%	16,5%	12,3%
Job-seeker	2,6%	3,9%	3,2%
Blue-collar worker	6,5%	5,5%	6,0%
White-collar worker	16,3%	33,8%	24,6%
Public servant/teacher	9,8%	11,9%	10,8%
Invalid/disabled	2,6%	7,7%	5,0%
C-level	,1%	1,2%	,6%
Self-employed	3,7%	7,4%	5,5%
Houseman/wife	5,6%	1,4%	3,6%
Retired	42,5%	9,0%	26,5%
Other	1,9%	1,8%	1,9%
Diploma (p=.000)			
No diploma	2,9%	1,4%	2,2%
Primary education	10,8%	4,5%	7,8%
Secondary education	38,5%	29,3%	34,1%
Higher education	31,8%	33,5%	32,6%
University	12,9%	24,0%	18,2%
Postgraduate	3,0%	7,3%	5,1%

	No smartphone (N=1.844)	Smartphone (N=1.675)	Total (N=3.519)
Family situation (p=.000)			
Single without child(ren)	14,1%	15,9%	14,9%
Single with child(ren)	6,4%	4,0%	5,3%
Living together without child(ren)	33,6%	25,6%	29,7%
Living together with child(ren)	25,8%	32,9%	29,2%
Living together with both parents	7,1%	14,2%	10,5%
Living together with one parent	2,5%	5,3%	3,8%
Living together with others	,5%	1,1%	,8%
Widow/widower	10,2%	1,1%	5,8%
Age categories (p=.000)			
15 - 19	4,5%	9,4%	6,8%
20 - 29	8,3%	20,8%	14,3%
30 - 39	8,1%	23,2%	15,3%
40 - 49	13,8%	21,9%	17,7%
50 - 59	18,4%	15,0%	16,8%
60 - 64	10,2%	3,5%	7,0%
> 65	36,7%	6,1%	22,1%
Income (p=.000)			
No income	9,2%	13,8%	11,4%
< 1.000	5,4%	4,7%	5,1%
1.000 - 1.500	17,9%	11,5%	14,8%
1.501 - 2.000	19,8%	22,8%	21,2%
2.001 - 3.000	17,6%	23,8%	20,5%
> 3.000	4,8%	10,0%	7,3%
I do not know	3,7%	1,2%	2,5%
I prefer not to say	21,6%	12,3%	17,1%

Table 35: Profiling of smartphone adopters and non-adopters (%).

- The profile of those with a data subscription is similar to the profile of those with a smartphone. However, people with a data subscription seem to be a bit older (20+) than those with a smartphone.

Profiling of mobile data subscription adopters and non-adopters

	No mobile Internet (N=2.190)	Mobile Internet (N=1.329)	Total (N=3.519)
Gender (p=.000)			
Men	42,8%	59,5%	49,1%
Women	57,2%	40,5%	50,9%
Profession (p=.000)			
Student	10,0%	15,9%	12,3%
Job-seeker	2,9%	3,8%	3,2%
Blue-collar worker	6,5%	5,2%	6,0%
White-collar worker	18,7%	34,4%	24,6%
Public servant/teacher	10,0%	12,0%	10,8%
Invalid/disabled	4,1%	6,7%	5,1%
C-level	,1%	1,5%	,6%
Self-employed	4,4%	7,1%	5,4%
Houseman/wife	5,1%	1,1%	3,6%
Retired	36,3%	10,5%	26,6%
Other	1,9%	1,8%	1,9%
Diploma (p=.000)			
No diploma	3,0%	,9%	2,2%
Primary education	9,7%	4,5%	7,8%
Secondary education	36,2%	30,9%	34,1%
Higher education	32,3%	33,3%	32,6%
University	14,7%	23,9%	18,2%
Postgraduate	4,2%	6,5%	5,1%

	No mobile Internet (N=2.190)	Mobile Internet (N=1.329)	Total (N=3.519)
Family situation (p=.000)			
Single without child(ren)	14,9%	15,0%	15,0%
Single with child(ren)	5,9%	4,3%	5,3%
Living together without child(ren)	32,2%	25,7%	29,7%
Living together with child(ren)	27,0%	32,7%	29,2%
Living together with both parents	8,1%	14,4%	10,5%
Living together with one parent	2,8%	5,4%	3,8%
Living together with others	,8%	,8%	,8%
Widow/widower	8,3%	1,7%	5,8%
Age categories (p=.000)			
15 - 19	5,8%	8,6%	6,9%
20 - 29	10,1%	21,2%	14,3%
30 - 39	10,7%	22,9%	15,3%
40 - 49	14,7%	22,6%	17,7%
50 - 59	19,1%	13,0%	16,8%
60 - 64	8,7%	4,3%	7,0%
> 65	31,0%	7,4%	22,1%
Income (p=.000)			
No income	10,5%	13,0%	11,4%
< 1.000	5,5%	4,4%	5,1%
1.000 - 1.500	16,8%	11,5%	14,8%
1.501 - 2.000	20,1%	23,1%	21,2%
2.001 - 3.000	18,4%	24,0%	20,5%
> 3.000	5,7%	9,9%	7,3%
I do not know	3,2%	1,3%	2,5%
I prefer not to say	19,7%	12,8%	17,1%

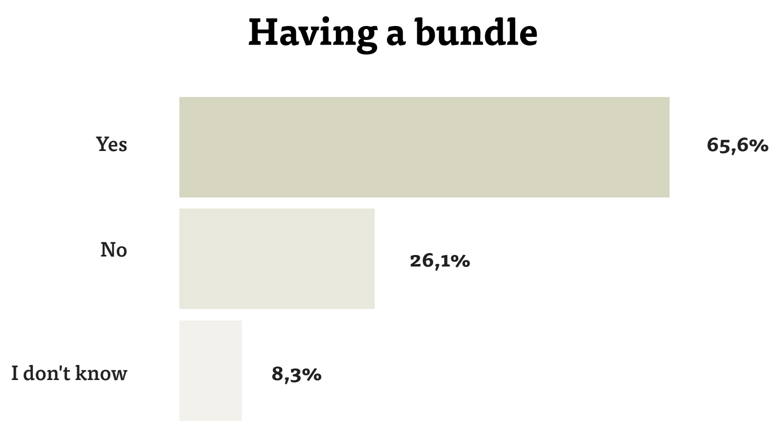
Table 36: Profiling of mobile data subscription adopters and non-adopters (%).

Chapter 5: Bundles

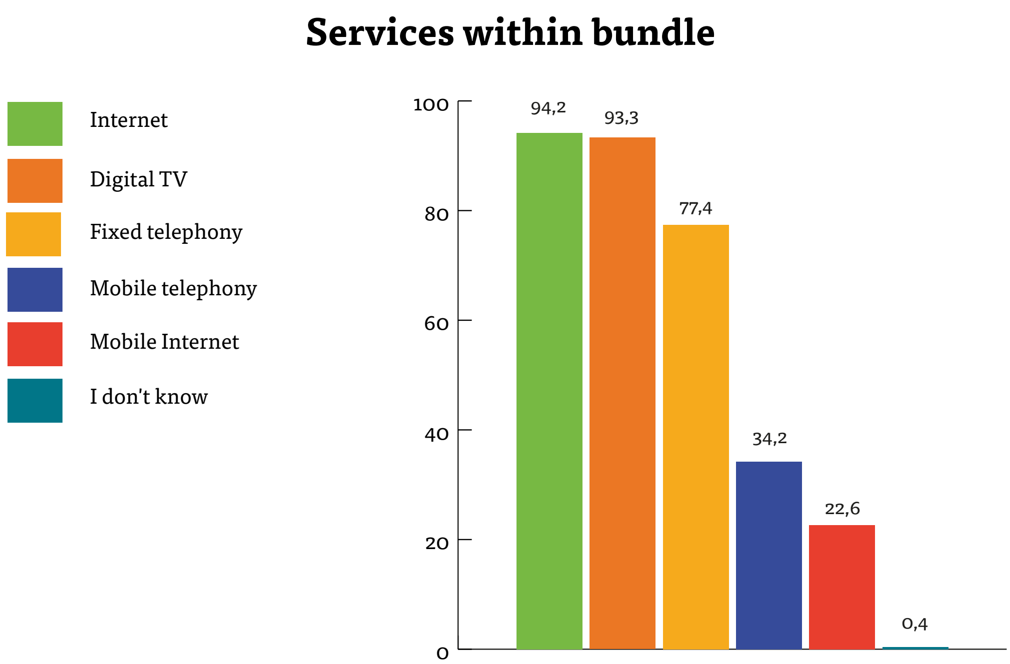
5

General facts & figures (N= 3.519):

- 65,6% of the Flemish population indicates they have subscribed to a bundle, pack, shake or multiple play pack (+5%)*.
- Internet (94,2%), digital TV (93,3%) and fixed phone line (77,4%) constitute the most common services in these packs.

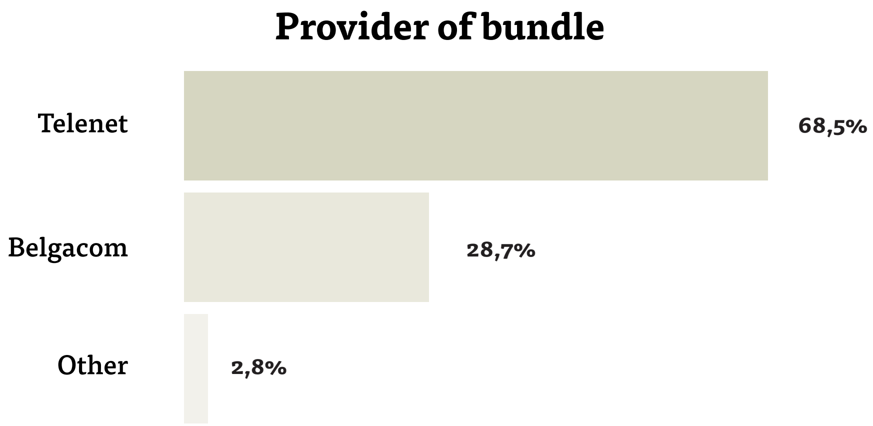


Graph 26: Having a bundle (%; N=3.519).

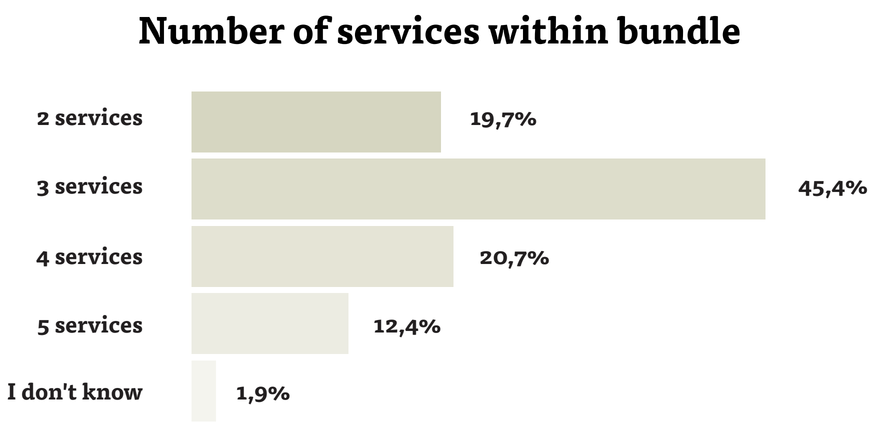


Graph 27: Services within bundle (%; N=2.309).

- Telenet cuts out the largest market share for bundles (68,5%), Belgacom comes in second (28,7%) and 2,8% has a bundle with another provider.
- About half of those with a bundle (45,4%) have a bundle consisting of three services (mostly digital TV, Internet and a fixed telephone connection). 19,7% has a bundle with only two services (mostly Internet and digital TV), while 20,7% has four services (mostly digital TV, Internet, a fixed telephone connection and mobile telephony).



Graph 28: Provider of bundle (%; N=2.309).



Graph 29: Number of services within bundle (%; N=2.309).

Chapter 6:
Social Media Sites

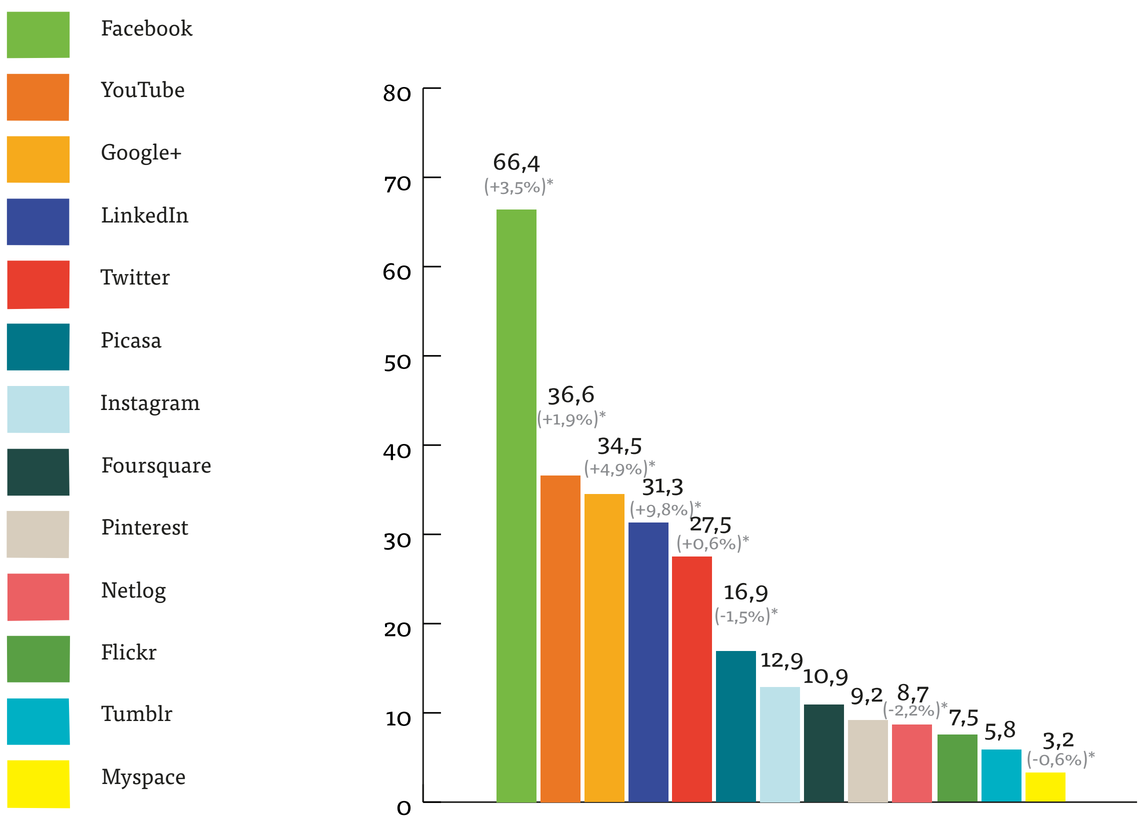
6

1. Social media accounts

General facts & figures (N=3.519):

- Social media remain an important aspect in the digital life of the majority of Flemish people. 76,7% has an account on one or more social media websites (+6,6%)*.
- Most people have an account on Facebook (66,4%), followed by YouTube (36,6%) and Google+ (34,5%). This is the same top three as last year.
- LinkedIn shows the most notable increase with almost 10% to 31,3% Flemings with a LinkedIn account. That way, LinkedIn passed the 27,5% penetration of Twitter accounts.
- 17,6% has only one account (mostly Facebook), 17,6% has two accounts (mostly Facebook and LinkedIn) and 15,7% has three accounts (mostly Facebook, Google+ and YouTube).
- For one out of two without a social media account (54,8%), 'no interest or need to be active on social media' is the main reason for not having an account. Privacy issues prevent one out of five (20,7%) of having an account on social media.

Accounts on social media sites



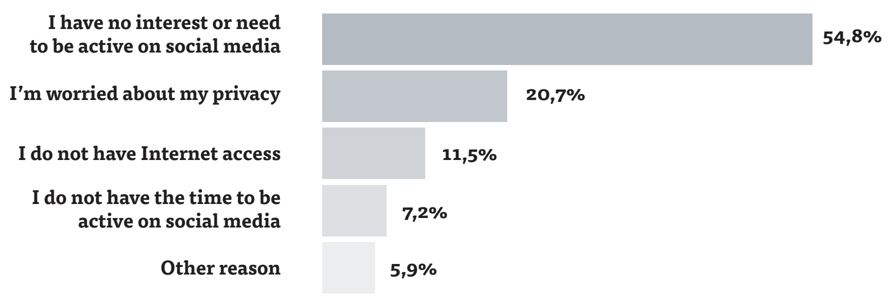
Graph 30: Accounts on social media sites (%; N=3.519).

Number and type of accounts on social media sites

Number	%	Type
0	23,3	
1	17,6	Mostly Facebook
2	15,7	Mostly Facebook,LinkedIn
3	12,5	Mostly Facebook, YouTube, Google+
4	9,3	Mostly Facebook, YouTube, Google+, LinkedIn
5	6,7	Mostly Facebook, YouTube, Google+, Twitter, LinkedIn
6	4,7	Mostly Facebook, YouTube, Twitter, Google+, LinkedIn, Instagram
7	3,7	Mostly Facebook, Twitter, YouTube, Google+, LinkedIn, Instagram, Foursquare
8	2,0	
9	1,9	
10	1,1	
11	1,0	
12	,3	
13	,2	

Table 37: Number and type of accounts on social media sites (%; N=3.519).

Main reason for not having an account on social media



Graph 31: Main reason for not having an account on social media (%; N=821).

- Not everyone having an account on one or more social media websites logged on during the past month. 73,9% of our population logged onto a social media site the past month, whereas 76,6% of our population has an account on at least one social media website.
- Those with a Facebook account seem to be the most loyal users. 95,4% of all those with a Facebook account have logged on the past month. Myspace has the least loyal users: only 9,8% of those with an account has logged on the past month.
- In general, the younger age groups use more social media than the older age groups. The only social network that seems to be more popular within older age groups is Picasa. 22,2% of the people aged 60 or older has logged onto this photo sharing website the past month versus 7,8% of the total population. For obvious reasons, LinkedIn is the least popular in the youngest and oldest age group.
- Except for Pinterest and Tumblr, all social media have more male users than female users. For Tumblr this difference was not significant.

Use of social media the past month

	Percent
Facebook (N=2.336)	**95,4**
LinkedIn (N=1.100)	81,4
Foursquare (N=384)	74,4
Twitter (N=969)	74,3
Instagram (N=454)	74,1
YouTube (N=1.289)	73,3
Google+ (N=1.213)	63,8
Pinterest (N=325)	59,7
Tumblr (N=204)	57,0
Picasa (N=596)	45,9
Flickr (N=265)	36,3
Netlog (N=306)	21,0
Myspace (N=113)	9,8

Table 38: Use of social media the past month (%).

Use of social media plotted by age

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Facebook (p=.000)	92,1%	92,0%	87,2%	72,0%	53,1%	49,0%	24,9%	63,4%
Twitter (p=.000)	22,7%	37,5%	35,9%	24,5%	13,5%	6,5%	4,6%	20,5%
LinkedIn (p=.000)	2,9%	38,6%	49,9%	37,2%	21,7%	10,1%	5,4%	25,4%
Netlog (p=.053)	2,5%	1,2%	1,7%	2,7%	2,0%	3,3%	0,8%	1,8%
YouTube (p=.000)	57,4%	51,2%	34,4%	26,4%	17,4%	15,4%	7,6%	26,8%
Flickr (p=.000)	2,5%	4,2%	6,3%	3,4%	1,2%	2,0%	0,4%	2,8%
Picasa (p=.000)	2,5%	4,2%	7,8%	6,6%	9,8%	12,6%	9,6%	7,8%
Myspace (p=.051)	0,0%	0,4%	0,2%	1,0%	0,2%	0,4%	0,0%	0,3%
Google+ (p=.000)	21,1%	22,3%	26,6%	24,6%	25,4%	18,6%	15,4%	22,0%
Instagram (p=.000)	24,4%	22,1%	16,4%	8,5%	2,9%	1,6%	0,6%	9,6%
Foursquare (p=.000)	14,5%	18,5%	15,5%	9,8%	1,4%	0,8%	0,4%	8,1%
Pinterest (p=.000)	2,9%	10,8%	13,6%	5,1%	3,2%	1,2%	0,8%	5,5%
Tumblr (p=.000)	15,3%	7,0%	4,5%	1,9%	1,0%	1,2%	0,0%	3,3%

Table 39: Use of social media plotted by age (%; N=3.519).

Use of social media plotted by gender

	Men	Women	Total
Facebook (p=.000)	66,6%	60,3%	63,4%
Twitter **(p=.000)**	27,6%	13,5%	20,5%
LinkedIn (p=.000)	33,0%	18,1%	25,4%
Netlog (p=.605)	2,0%	1,7%	1,8%
YouTube (p=.000)	36,7%	17,3%	26,8%
Flickr (p=.000)	3,9%	1,6%	2,7%
Picasa (p=.001)	9,3%	6,3%	7,8%
Myspace (p=.030)	0,5%	0,1%	0,3%
Google+ (p=.000)	28,5%	15,7%	22,0%
Instagram (p=.138)	10,3%	8,8%	9,5%
Foursquare (p=.000)	11,5%	4,9%	8,1%
Pinterest (p=.000)	4,0%	6,9%	5,5%
Tumblr (p=.572)	3,1%	3,5%	3,3%

Table 40: Use of social media plotted by gender (%; N=3.519).

- The motives for visiting social media sites clearly depend on the type of account.
- Facebook and Google+ are mainly used to maintain and set up personal contacts (48,8% and 22,9%).
- People use Twitter mainly to follow the news (24,1%) and to keep track of other people or organizations (27,1%).
- Maintain and set up business contacts is by far the most popular motive to have a LinkedIn account (64,9%).
- Google+ clearly has the most vague profile, as none of the options scores higher than 25% and in general, less motives are marked.

Motives for visiting social media sites

	To be online	To kill time	To pass an opinion or thought	To maintain or set up personal contacts	To maintain or set up business contacts	To follow other persons/ organizations	To follow actua	To seek a job	To watch content	To share content	To react on/follow programs
Facebook (N=2.270)	10,6	9,4	4,6	48,8	1,3	13,3	4,2	0,1	5,4	2,0	0,2
Twitter (N=961)	8,6	9,8	14,1	5,2	5,1	27,1	24,1	0	3,7	1,1	1,1
LinkedIn (N=1.073)	8,7	1,5	0,7	7,5	64,9	6,5	1,1	8,4	0,3	0,3	0,1
Google+ (N=1.158)	15,6	15,4	4,1	22,9	5,6	10,3	10,0	0,4	9,2	6,1	0,5

Table 41: Motives for visiting social media websites (multiple motives allowed) (%).

- Of all those with a social media account, 96,4% logged in on one or more accounts in the past month.
- There is a slight difference in the use of social media during the week and weekend. Although the use is a bit higher in the week, the periods are shorter than during weekends (38,6% less than one hour a day in the week versus 34,6% less than one hour a day in the weekend, and 6,1% more than three hours a day in the week versus 8,2% more than three hours a day during the weekend).

Frequency of using social media

	Week	Weekend
Never	3,9	4,5
< daily	24,7	23,7
< 1 hour a day	38,6	34,6
1 - 3 hours a day	26,7	29,0
> 3 hours a day	6,1	8,2

Table 42: Frequency of using social media (%; N= 2.698).

Using social media

	Percent
Using social media during the week	96,1
Using social media during the weekend	95,5
Using social media	96,4

Table 43: Using social media (%; N=2.698).

- 18,2% of Flemish people active on social media indicate they cannot pass a day without social media.
- 61,1% thinks that social media are time intensive and 32,5% believes that social media violate their privacy. However, 26,3% says to share more on social media than before.
- A vast majority (64,1%) agrees that social media sites give the opportunity to keep in contact with people they otherwise would have no contact with anymore.
- 28,5% has an account because other people also have one.

Opinion on social media

	(Total) disagree	Neutral	(Total) agree
I can't pass a day without social media	65,1	16,7	18,2
Social media are time intensive	14,7	24,2	61,1
Social media give me the opportunity to keep in contact with people I otherwise would have no contact with anymore	18,3	17,6	64,1
I have an account on social media because others also have an account	45,8	25,8	28,5
Social media violate my privacy	30,2	37,4	32,5
I now share more on social media than before	51,9	21,7	26,3

Table 44: Opinion on social media (%; N= 2.698).

- The profile of those without an account on one or more social network sites clearly differs from the profile of people with an account.
- The group without an account is more likely to be female, retired or houseman/wife, lower educated or of an older age group (65+). People living together without children and singles with children are also overrepresented in this group.
- Men, students and white-collar workers are overrepresented in the group having an account on one or more social media sites. People living together with both parents and the age group 20-39 years are also more likely to have a social media account.

Profiling of social media adopters and non-adopters

	No social media (N=821)	Social media (N=2.698)	Total (N=3.519)
Gender (p=.000)			
Men	36,3%	53,0%	49,1%
Women	63,7%	47,0%	50,9%
Profession (p=.000)			
Student	1,5%	15,6%	12,3%
Job-seeker	,9%	3,9%	3,2%
Blue-collar worker	5,5%	6,2%	6,0%
White-collar worker	12,3%	28,4%	24,6%
Public servant/teacher	6,5%	12,1%	10,8%
Invalid/disabled	2,4%	5,8%	5,0%
C-level	,5%	,6%	,6%
Self-employed	2,6%	6,3%	5,4%
Houseman/wife	6,8%	2,6%	3,6%
Retired	59,2%	16,6%	26,6%
Other	1,9%	1,9%	1,9%
Diploma (p=.000)			
No diploma	3,3%	1,9%	2,2%
Primary education	15,5%	5,5%	7,8%
Secondary education	40,6%	32,2%	34,1%
Higher education	30,9%	33,2%	32,6%
University	7,2%	21,6%	18,2%
Postgraduate	2,6%	5,8%	5,1%

	No social media (N=821)	Social media (N=2.698)	Total (N=3.519)
Family situation (p=.000)			
Single without child(ren)	12,4%	15,7%	14,9%
Single with child(ren)	8,0%	4,4%	5,3%
Living together without child(ren)	37,8%	27,3%	29,7%
Living together with child(ren)	24,7%	30,5%	29,2%
Living together with both parents	1,0%	13,4%	10,5%
Living together with one parent	0,5%	4,8%	3,8%
Living together with others	,1%	1,0%	,8%
Widow/widower	15,5%	2,9%	5,8%
Age categories (p=.000)			
15 - 19	0,9%	8,7%	6,9%
20 - 29	1,0%	18,3%	14,3%
30 - 39	3,4%	18,9%	15,3%
40 - 49	11,5%	19,6%	17,7%
50 - 59	19,0%	16,1%	16,8%
60 - 64	9,4%	6,3%	7,0%
> 65	54,9%	12,2%	22,1%
Income (p=.000)			
No income	4,3%	13,6%	11,4%
< 1.000	5,2%	5,0%	5,1%
1.000 - 1.500	20,2%	13,2%	14,8%
1.501 - 2.000	16,6%	22,7%	21,2%
2.001 - 3.000	15,3%	22,1%	20,5%
> 3.000	6,1%	7,6%	7,3%
I do not know	4,6%	1,9%	2,5%
I prefer not to say	27,6%	13,9%	17,1%

Table 45: Profiling of social media adopters and non-adopters (%).

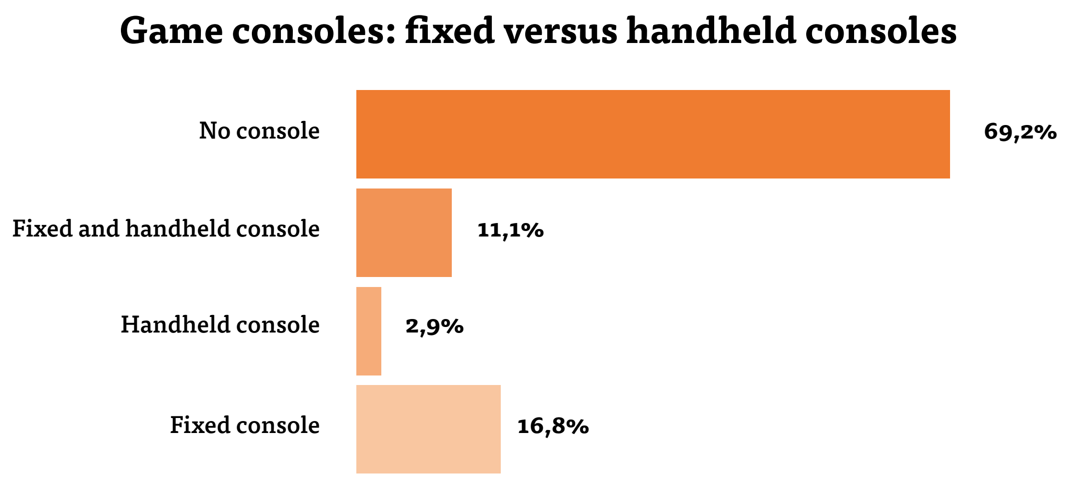
Chapter 7: Games

1. Playing games and devices

General facts & figures (N=3.519):

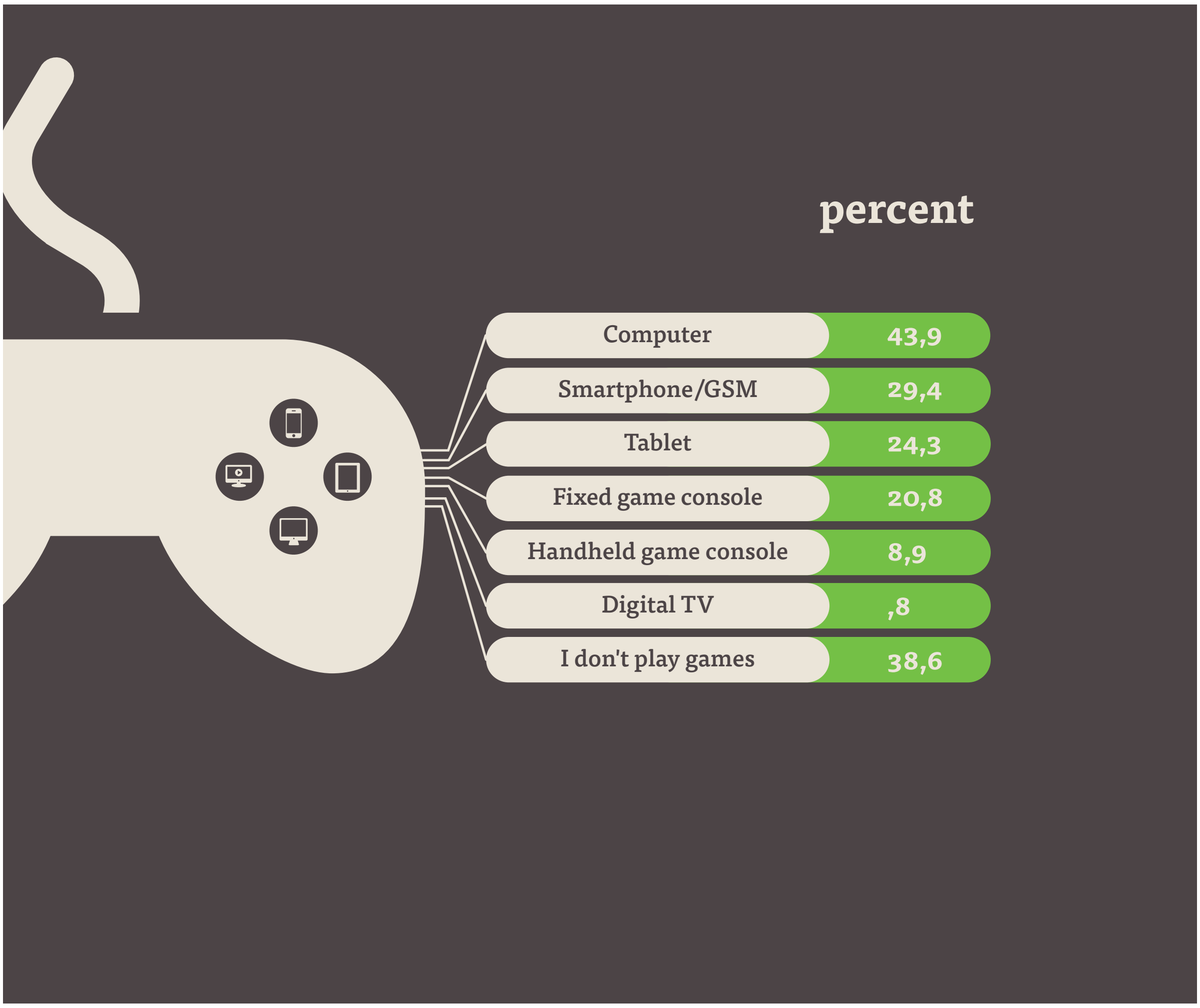
- The decreasing trend of game console adoption has continued this year. Currently, 30,8% of the Flemish population has a game console in use (-9,2%)*:
  - Handheld console: 14,1% (-10,6%)*
  - Fixed console: 27,9% (-8%)*
- Despite the decreasing trend for game consoles, the actual playing of games still shows a positive evolution. In total, 61,4% indicates to play a game once in a while (+2,4%)*. The most common device to play games is a computer (43,9%), followed by the mobile phone (29,4%) and the tablet(24,3%).

- 19,7% of the Flemish population has only one type of console: 16,8% only has one (or more) fixed console(s) and 2,9% at least one handheld console.
- 11,1% of our population has both types of game consoles.
- Game consoles are clearly not the standard devices anymore to play games. 20,8% plays once in a while a game on a fixed game console and 8,9% on a handheld console.
- Having a console does not mean they also play games on it. 74,2% of all those owning a fixed game console uses it to play games, while this is true for 62,3% of those with a handheld console.



Graph 32: Game consoles: fixed versus handheld consoles (%; N=3.519).

Playing games on different devices



Infographic 7: Playing games on different devices (%; N=3.519).

- We did not measure much difference between the frequency of playing games during the week (96,2%) and the weekend (96,9%). However, people seem to play for longer periods in the weekend than during the week (5,1% versus 2,6 % playing more than three hours a day).

Frequency of playing games

	Week	Weekend
Never	3,8	3,1
< daily	53,5	51,2
< 1 hour a day	28,0	25,6
1 - 3 hours a day	12,1	15,0
> 3 hours a day	2,6	5,1

Table 46: Frequency of playing games (%; N=2.162).

Playing games

	Percent
Playing games during the week	96,2
Playing games during the weekend	96,9

Table 47: Playing games (%; N=2.162).

2. Profiling of gamers and non-gamers

- The profile of gamers clearly differs from the profile of non-gamers.
- Non-gamers are more likely to be female, retired, having a primary education, living together or married without children or belonging to the older age groups (50-59 and 65+).
- Gamers seem to be more male, students, living with their parents, of the younger age groups (15-39 years) and having no income.

Profiling of gamers and non-gamers

	Not playing games (N=1.357)	Playing games (N=2.162)	Total (N=3.519)
Gender (p=.000)			
Men	41,8%	53,7%	49,1%
Women	58,2%	46,3%	50,9%
Profession (p=.000)			
Student	3,0%	18,1%	12,3%
Job-seeker	2,1%	3,9%	3,2%
Blue-collar worker	5,6%	6,2%	6,0%
White-collar worker	20,0%	27,5%	24,6%
Public service/teacher	10,3%	11,1%	10,8%
Invalid/disabled	4,4%	5,4%	5,0%
C-level	,9%	,5%	,6%
Self-employed	5,4%	5,5%	5,5%
Houseman/wife	5,4%	2,5%	3,6%
Retired	41,3%	17,4%	26,6%
Other	1,6%	2,0%	1,9%
Diploma (p=.000)			
No diploma	2,9%	1,8%	2,2%
Primary education	10,6%	6,0%	7,8%
Secondary education	33,3%	34,7%	34,1%
Higher education	32,3%	32,8%	32,6%
University	15,9%	19,7%	18,2%
Postgraduate	5,0%	5,1%	5,1%

	Not playing games (N=1.357)	Playing games (N=2.162)	Total (N=3.519)
Family situation (p=.000)			
Single without child(ren)	14,1%	15,4%	14,9%
Single with child(ren)	7,2%	4,1%	5,3%
Living together without child(ren)	36,3%	25,7%	29,8%
Living together with child(ren)	27,4%	30,3%	29,2%
Living together with both parents	2,4%	15,5%	10,5%
Living together with one parent	1,0%	5,6%	3,8%
Living together with others	,5%	1,0%	,8%
Widow/widower	11,2%	2,5%	5,8%
Age categories (p=.000)			
15 - 19	1,0%	10,6%	6,9%
20 - 29	5,2%	19,9%	14,3%
30 - 39	9,5%	18,9%	15,3%
40 - 49	17,0%	18,1%	17,7%
50 - 59	22,7%	13,1%	16,8%
60 - 64	7,7%	6,5%	7,0%
> 65	36,8%	12,9%	22,1%
Income (p=.000)			
No income	4,9%	15,4%	11,4%
< 1.000	4,1%	5,7%	5,1%
1.000 - 1.500	15,8%	14,2%	14,8%
1.501 - 2.000	19,8%	22,1%	21,2%
2.001 - 3.000	20,9%	20,3%	20,5%
> 3.000	8,6%	6,4%	7,3%
I do not know	2,9%	2,3%	2,5%
I prefer not to say	22,9%	13,5%	17,1%

Table 48: Profiling of gamers and non-gamers (%).

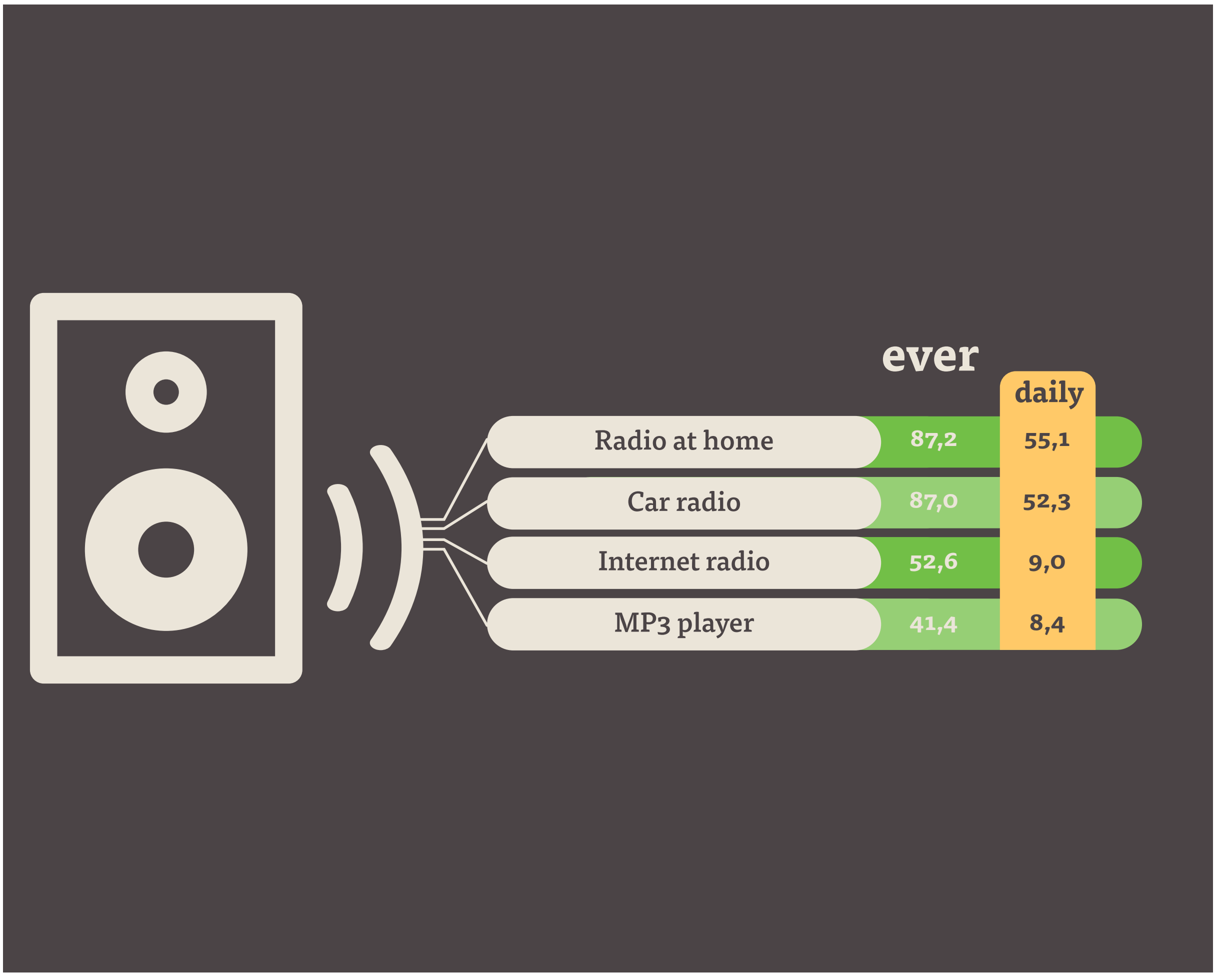
Chapter 8:
Traditional media

8

1. Radio

- 96,7% of the Flemish population listens to the radio from time to time. The youngest and the oldest age categories seem to be less prone to listen to the radio than the other age categories.
- The most popular devices to listen to the radio are by far the radio at home (87,2%) and the car radio (87%).
- There is not much difference in the time that people listen to the radio during the week and weekend.

Listening to radio through different devices



Infographic 8: Listening to radio through different devices (%; N=3.519).

Frequency of listening to the radio

	Week	Weekend
Never	3,5	4,4
< daily	11,0	12,3
< 1 hour a day	21,6	22,4
1 - 3 hours a day	31,0	28,4
> 3 hours a day	32,9	32,6

Table 49: Frequency of listening to the radio (%; N= 3.519).

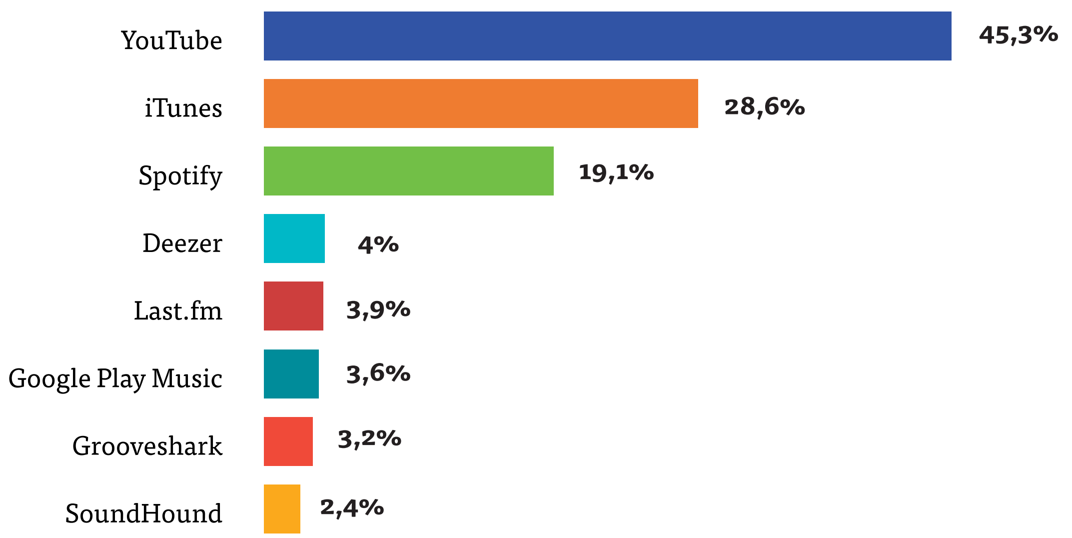
Listening to the radio

	Percent
Listening to the radio during the week	96,5
Listening to the radio during the weekend	95,6
Listening to the radio	96,7

Table 50: Listening to the radio (%; N= 3.519).

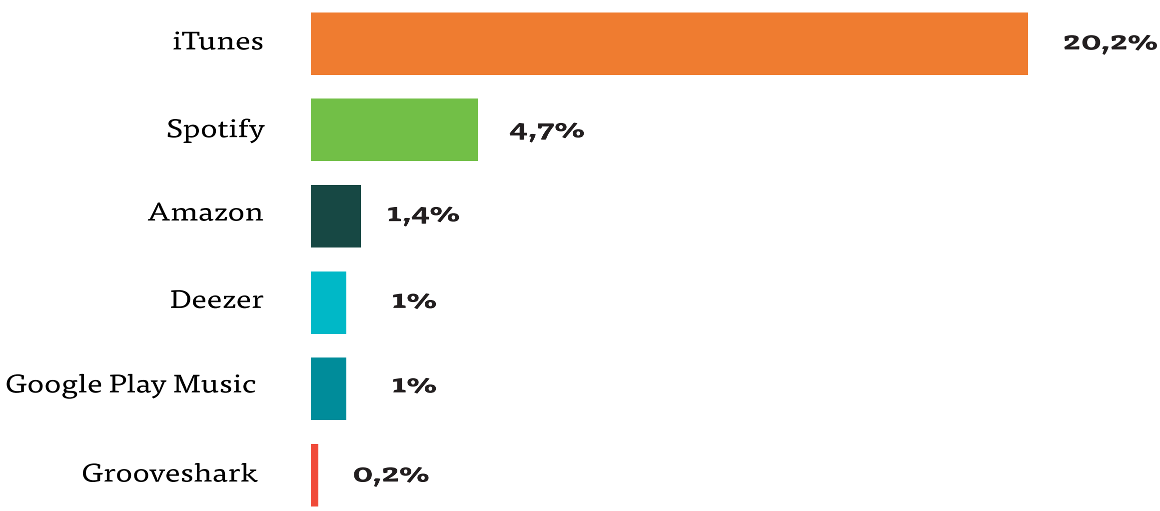
- 59,5% of our population consumes music online from time to time.
- About one out of two listens to music on YouTube (45,3%). SoundHound is the least popular channel in our suggested list (2,4%).
- 23,4% of the entire population already paid for online music (paid account or buying music online) on one or more of the six suggested online music channels.
- Most people only use the free options of the online music channels. The only exception here is iTunes: 20,2% has already bought music on iTunes.

Using different online music channels



Graph 33: Using different online music channels (%; N= 3.519).

Paying for music on different online music channels



Graph 34: Paying for music on different online music channels (%; N=3.519).

- About six out of ten respondents consume music online from time to time. Most of them only use one channel (26,9%), mainly YouTube. 19,4% of the population uses two channels, mainly YouTube and iTunes.
- Using online channels to listen to or buy music decreases with age.
- Men seem to be more frequent users of online music channels/suppliers than women (66% versus 53,3%).

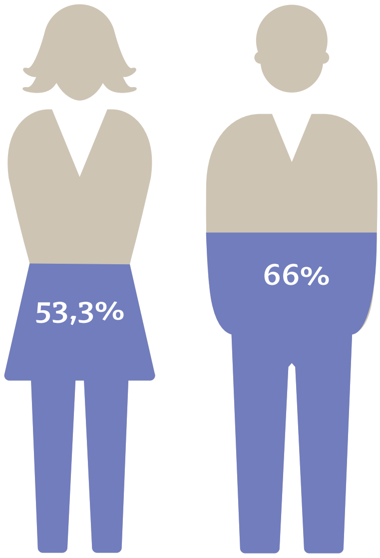
Number and type of online music channels

(Deezer, iTunes, Spotify, Google Play Music, Grooveshark, SoundHound, Last.fm, YouTube, Amazon)

Number	%	Type
0	40,5	
1	26,9	Mostly YouTube
2	19,4	Mostly YouTube, iTunes
3	9,0	Mostly YouTube, iTunes, Spotify
4	3,0	Mostly YouTube, iTunes, Spotify, Last.fm
5	0,8	Mostly YouTube, Spotify, iTunes, Last.fm, Deezer
6	0,3	
7	0,2	
8	0	

Table 51: Number and type of online music channels (%; N=3.519).

Population using online music channels plotted by gender



Graph 35: Population using online music channels plotted by gender (%; N= 3.519).

Population using online music channels plotted by age

15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
94,6%	90,0%	77,8%	69,9%	49,2%	39,8%	22,1%	59,5%

Table 52: Population using online music channels plotted by age (%; N= 3.519).

- The top three sources for following the news are radio (91,6%), national TV news (90,5%) and the newspaper (84,8%). When looking at daily frequencies, the top three is radio (66%), national TV news (58,9%)and news sites on the computer (42,5%). Compared to last year, the only difference is that news sites have surpassed the newspaper in terms of daily use.
- Men seem to follow the news more than women. For newspaper, regional TV news and radio there were no significant differences between the two sexes.
- Except for regional TV news, the oldest age group always scores below average in following the news on different channels. For every age group, the national TV news scores high. The only news channel that shows a clear decrease with age is social media.

Following the news on different devices

	Never	Seldom	Montly	Weekly	Daily
Radio	8,4	9,4	3,4	12,9	66,0
National TV	9,5	7,9	4,7	19,1	58,9
News sites on desktop/ laptop	23,5	11,5	6,3	16,2	42,5
Newspaper	15,2	21,6	5,9	18,6	38,7
Social media	44,4	11,4	3,7	12,6	27,9
Regional TV	20,9	26,7	10,8	20,5	21,1
GSM/smartphone	57,2	13,0	4,0	9,1	16,7
Tablet	59,7	13,2	3,7	8,9	14,5
SMS services	85,7	8,8	0,9	1,5	3,1

Table 53: Following the news on different devices (%; N= 3.519).

Following the news on different devices plotted by gender

	Men	Women	Total
Newspaper (p=.629)	84,4%	85,0%	84,7%
Tablet (p=.000)	46,3%	34,6%	40,3%
GSM/smartphone (p=.000)	51,9%	34,1%	42,9%
SMS services (p=.000)	17,1%	11,6%	14,3%
News sites on desktop/laptop (p=.000)	84,6%	68,5%	76,4%
Social media (p=.000)	59,9%	51,4%	55,6%
National TV (p=.000)	92,9%	88,2%	90,5%
Regional TV (p=.700)	79,4%	78,9%	79,1%
Radio (p=.398)	92,0%	91,2%	91,6%

Table 54: Following the news on different devices plotted by gender (%; N=3.519).

Following the news on different devices plotted by age

	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Newspaper (p=.047)	85,5%	87,3%	82,1%	83,6%	88,0%	85,8%	83,1%	**84,8%**
Tablet (p=.000)	44,2%	38,4%	49,3%	52,4%	41,5%	35,8%	25,0%	**40,3%**
GSM/ smartphone (p=.000)	66,4%	62,5%	66,9%	54,7%	32,0%	19,8%	12,5%	**42,9%**
SMS services (p=.000)	26,9%	9,4%	10,4%	17,8%	17,1%	13,0%	11,6%	**14,3%**
News sites on desktop/ laptop (p=.000)	80,5%	91,4%	91,6%	80,9%	76,8%	81,3%	49,7%	**76,4%**
Social media (p=.000)	90,0%	87,3%	77,7%	61,1%	41,8%	39,8%	20,5%	**55,6%**
National TV (p=.002)	88,4%	90,4%	94,0%	92,3%	90,7%	90,7%	87,2%	**90,5%**
Regional TV (p=.000)	75,5%	68,9%	75,4%	80,5%	85,1%	91,1%	79,8%	**79,1%**
Radio (p=.000)	83,9%	91,6%	95,0%	94,4%	91,5%	94,3%	88,7%	**91,6%**

Table 55: Following the news on different devices plotted by age (%; N= 3.519).

- 77,5% of the total population follows the national as well as the regional TV news. 19,7% follows both types even daily. 7,9% does not follow the national nor the regional TV news.
- 37% of the total population follows the news on newspaper as well as on the tablet. 6,2% follows both types even daily.

Following the news: regional TV news versus national TV news

		Regional TV					
		Never	Seldom	Monthly	Weekly	Daily	Total
National TV	Never	7,9%	0,2%	0,1%	0,7%	0,6%	**9,5%**
	Seldom	1,7%	5,4%	0,1%	0,3%	0,4%	**7,9%**
	Monthly	1,1%	1,7%	1,6%	0,2%	0,0%	**4,7%**
	Weekly	4,2%	5,7%	3,0%	5,8%	0,4%	**19,1%**
	Daily	6,0%	13,7%	6,0%	13,5%	19,7%	**58,9%**
	Total	20,9%	26,7%	10,8%	20,5%	21,1%	**100,0%**

Table 56: Following the news: regional TV news versus national TV news (%; N=3.519).

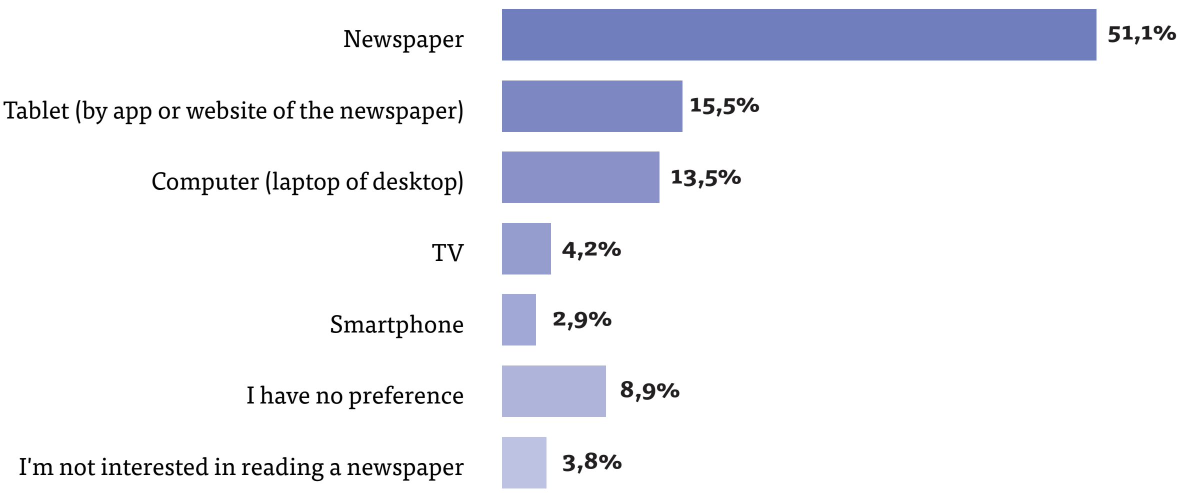
Following the news: traditional newspaper versus tablet newspaper

		Tablet					
		Never	Seldom	Monthly	Weekly	Daily	Total
Newspaper	Never	11,9%	0,7%	0,3%	0,7%	1,7%	**15,2%**
	Seldom	11,5%	4,8%	0,9%	1,3%	3,1%	**21,6%**
	Monthly	3,2%	1,0%	0,8%	0,5%	0,4%	**5,9%**
	Weekly	10,5%	2,5%	0,6%	2,0%	3,0%	**18,6%**
	Daily	22,7%	4,2%	1,1%	4,5%	6,2%	**38,7%**
	Total	59,7%	13,2%	3,7%	8,9%	14,5%	**100,0%**

Table 57: Following the news: traditional newspaper versus tablet newspaper (%; N=3.519).

- The paper version still remains the most favorite channel to read the newspaper: 51,1% of the population prefers this to reading the newspaper on a tablet (15,5%) or on the computer (13,5%).

Preferred channel to read the newspaper

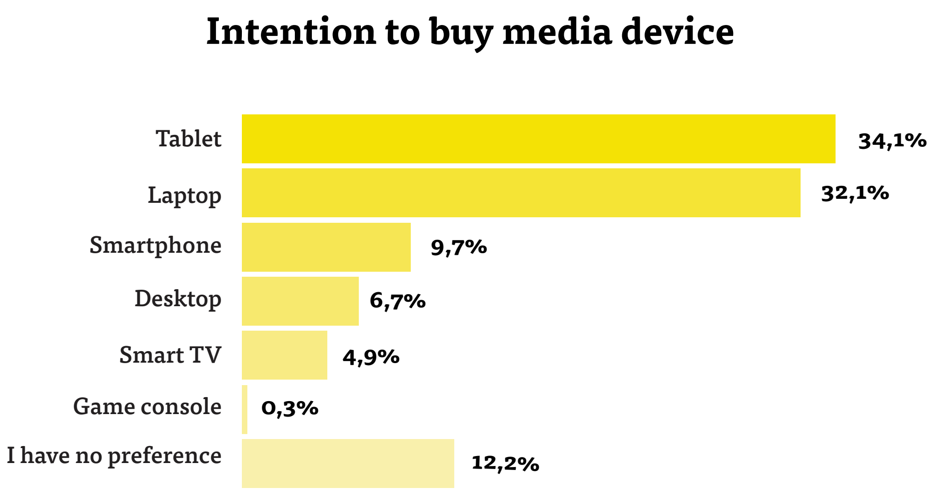


Graph 36: Preferred channel to read the newspaper (%; N= 3.519).

Chapter 9: General media use

General facts & figures (N=2.676):

- We integrated a hypothetical question in the survey: "Suppose you would buy a new media device in the near future. Which device would you prefer?" The tablet seems to be the preferred device (34,1%), followed by the laptop (32,1%).
- When looking at the different age groups, there is a noticeable difference. The youngsters (15-29 years old) prefer a laptop. The age group 60-64 also prefers a laptop although they also score high for tablet. The age group 30-59 prefers a tablet. A large part of the people older than 65 has no preference. For each age group, the desktop scores low.
- We also asked which device people prefer for different activities. Although the tablet has become a very popular device (+13,7%)*, most people prefer the laptop for different activities. TV remains the most popular device for watching series, programs and movies.



Graph 37: Intention to buy media device (%; N=3.519).

Intention to buy media device plotted by age

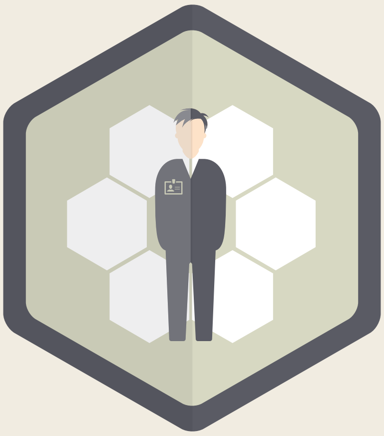
	15-19	20-29	30-39	40-49	50-59	60-64	65+	Total
Tablet	22,3%	30,7%	**37,5%**	**44,4%**	**39,5%**	**31,7%**	**25,8%**	34,1%
Laptop	**46,7%**	**38,4%**	31,0%	27,0%	34,3%	**36,2%**	**25,3%**	32,1%
Smartphone	17,8%	13,7%	11,5%	7,2%	8,6%	11,0%	5,5%	9,7%
Desktop	4,1%	7,6%	8,7%	5,1%	6,4%	11,8%	5,4%	6,7%
Smart TV	2,5%	3,8%	4,8%	7,2%	4,1%	3,3%	6,2%	5,0%
Game console	0,8%	1,4%	0,2%	0,2%	0,0%	0,0%	0,0%	0,3%
I don't have a preference	5,8%	4,4%	6,1%	8,8%	7,1%	6,1%	**31,8%**	12,2%

Table 58: Intention to buy media device plotted by age (%; N=3.519).

Preferred device for different activities

	I do not/not applicable	Desktop	Laptop	Tablet	Smartphone	(Smart) TV	Other device or channel
Online banking	18,9	29,0	**44,2**	3,9	3,1	0,0	0,9
Listening to music	12,3	10,8	**17,4**	4,1	10,7	2,3	42,5
Playing games	39,9	12,8	**18,6**	12,5	9,9	1,0	5,4
Watching TV series/ programs	11,1	3,0	8,8	2,1	0,4	**58,4**	16,3
Watching movies	12,4	3,3	9,7	1,5	0,2	**56,9**	16,0
Social network sites	30,2	14,8	**31,3**	10,2	12,7	0,1	0,7
Surfing on the Internet	9,0	26,5	**48,1**	12,0	3,3	0,4	0,7
Searching information	8,1	27,3	**46,6**	12,5	4,4	0,2	0,9
Reading e-book /e-magazines	63,3	2,8	7,2	**18,9**	2,8	0,1	4,8
Buying or selling online goods	31,3	25,3	**39,0**	3,1	0,5	0,1	0,7
Reading e-mail	8,2	25,6	**43,0**	10,4	12,0	0,2	0,5
Sending e-mail	8,3	28,0	**48,5**	8,5	6,1	0,2	0,4
Office (Word, Excel, ...)	17,4	31,4	**49,8**	0,8	0,3	0,1	0,2
Video chat	49,7	10,5	**27,8**	8,4	2,9	0,3	0,3
Following the news	8,5	15,1	**26,9**	10,6	7,7	19,6	11,6

Table 59: Preferred device for different activities (%; N=3.519).



Profiles

Like last year, we conclude this report with an overall segmentation of the Flemish media consumer. This segmentation is based on both the variety of use and the frequency of use of the following technologies and devices: TV, computer, Internet, tablet, social network sites, games and radio.

The variety of use is based on the number of different functionalities that are used. The frequency of use is based on the number of hours a technology is used.

The cluster[1] analysis resulted in five different profiles:

- Digital gentleman (16,7%)
- Instrumental media user (27,6%)
- Traditional media fan (23%)
- Online media master (13,7%)
- Media innovator (19%)

To illustrate, we give a comparison with the profiles of Digimeter 2012[2]. Four of the five profiles of Digimeter 2013 exhibit similarities with one of the five profiles of Digimeter 2012, although they are not quite the same. Moreover, the regular media user was no longer detected as separated profile but a new profile 'online media master' popped up.

- Advanced omni-user (14%):
    - Smaller group of early birds
    - High frequency and a high variety of media usage
    - Can be compared with the digital gentleman of this year
- Curious pleasure seeker (15,6%):
    - Wide variety of media functionalities
    - Lower willingness to pay for the newest technologies
    - Can be compared with the media innovator of this year
- Regular media user (23,8%):
    - Average media use and average variety of media use
- Traditional media user: 26,2%:
    - Prefers to stick to the 'traditional media'
    - Not that much into new media at all
    - Can be compared with the instrumental media fan of this year
- Sporadic media user (19,6%):
    - Very low media usage, knowledge and interest
    - Can be compared with the traditional media user of this year

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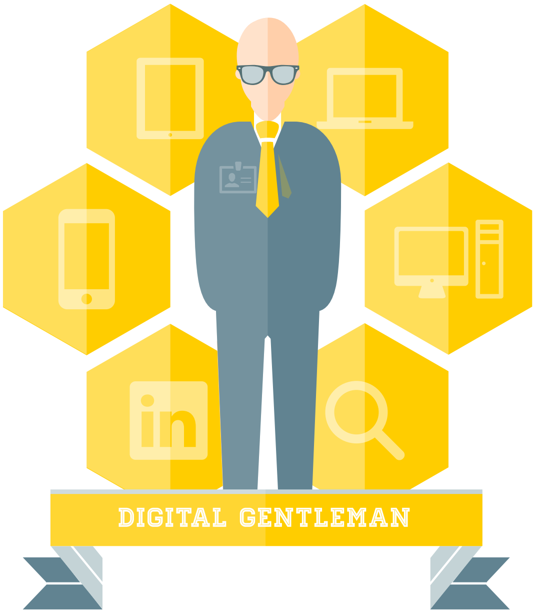
[1] For this analysis, a K-means cluster analysis was used based on 6 variables measuring the variety of use and 6 variables measuring the frequency of use for 5 segments.
[2] For this analysis, a K-means cluster analysis was used based on 9 variables measuring the variety of use and 6 variables measuring the frequency of use.

DIGITAL GENTLEMAN (16,7%)



PASSPORT

- male
- higher educated
- married/living together
- in his 30's to 40's

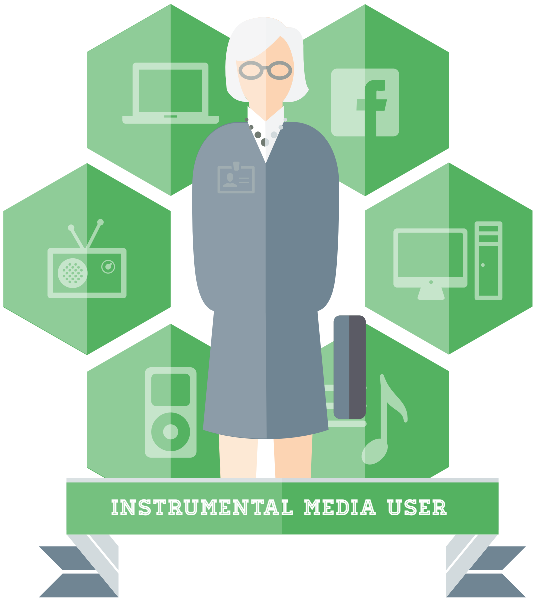
Digital gentlemen seem to have an average media use, both in frequency and variety. Only for playing games this profile scores lower. Nevertheless, they often have four screens (TV, laptop, tablet and smartphone) at home. The TV screen is very likely to be a smart TV, as this group already got rid of their classic tube TV.

Digital gentlemen score high in terms of adoption and use of computer and internet. Unlike the online media masters, digital gentlemen download movies/series and music primarily legal.

All digital gentlemen own a tablet and use the tablet frequently. They use the tablet primarily for functional purposes as e-mail and information search, but also for TV content consumption the digital gentleman often uses his tablet.

A digital gentleman usually has three accounts on social media. Especially LinkedIn scores high.

INSTRUMENTAL MEDIA USER (27,6%)



PASSPORT

- married or living together
- average to high income
- age group 50-59 year

TV, computer and radio are the favorite devices of the instrumental media user.

This profile frequently watches TV programs and uses as a wide range of (digital) television functionalities.

Instrumental media users are very likely to have a computer, and in most instances this is a laptop. A tablet is less common within this group.

In terms of social media, Facebook scores much higher than other social network sites.

More than the other profiles the instrumental media user is keen on the radio. Their preferred device is the radio at home, although other devices are also used to satisfy their radio hunger.

Instrumental media users often have three screens at home, usually a TV, a desktop and a laptop.

TRADITIONAL MEDIA FAN (23%)

PASSPORT

- female
- retired
- lower educated
- lower income
- no kids at home
- 50+ (especially 65+)

Traditional media fans have no distinct profile in terms of media ownership and use. However, they tend to avoid new technologies when possible.

This profile primarily watches television programs on their classic tube TV. In addition, they make little use of digital TV functionalities and prefer to watch live TV.

Both in terms of possession and use of computer and internet, traditional media fans score lower than other media user profiles. 'I can't work with a computer nor with internet' is often indicated as motivation.

Traditional media fans rarely have a tablet, but are strongly considering to buy one in the near future.

In terms of telephony, this profile still owns a fixed telephone line, and if they already have a mobile phone, this is definitely not a smartphone.

Traditional media fans have little interest in social media. Usually they have only one account and they spend less time on social media than the other profiles. More than the others, this profile is concerned about their privacy when using social media. Playing games is also not their cup of tea.

They prefer to follow the news on the traditional news channels (newspaper, TV and radio).

Traditional media fans tend to have two or fewer screens at home (mostly a classic tube TV and a laptop).

ONLINE MEDIA MASTER (13,7%)

PASSPORT

- no to lower income
- living with parents or single without children
- younger age groups (-30 year)

Online media masters do not watch TV frequently (on a TV set). This group has the highest percentage of people not owning a TV set, and also a high percentage of analogue television viewers.

Online media masters also score the lowest for listening to the radio (device). However, this does not mean they consume less television and radio content. On the contrary.

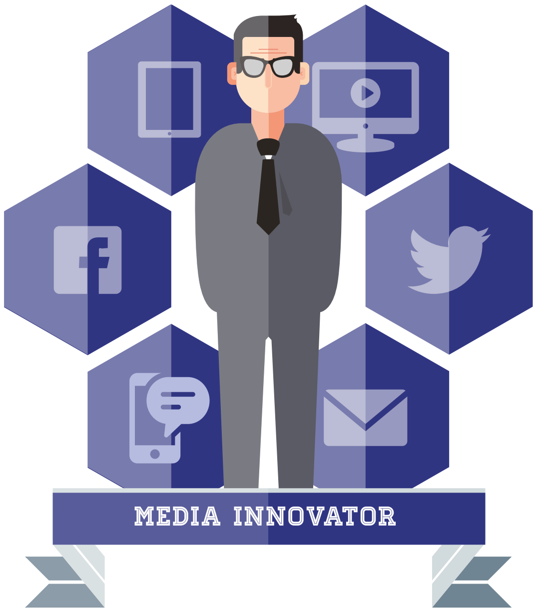
The adoption and use of computer and Internet is very high for this group. They often use the computer to view/stream and download television programs. Noteworthy is that of all profiles, the online media masters are the most active illegal downloaders (both for music and movies/series).

The adoption and use of tablets and phones is below average. When online media masters do have a smartphone, they almost exclusively have free apps installed.

Online media masters are very active on social media, often with 2 or 3 accounts. They also play games frequently, and prefer to do this on their computer.

Online media masters usually have three screens at home (usually a TV, a laptop and a desktop).

MEDIA INNOVATOR (19%)



PASSPORT

- male
- higher educated
- married/living together with children
- in his 30's to 40's

This profile has a rich media life, both in frequency and variety of media use.

Media innovators are the most innovative in both owning television devices as watching television programs. Like the digital gentlemen, this profile has switched their tube TV for a smart TV. However, watching TV is not limited to live viewing on a TV set, but also occurs very often on other devices (computer, tablet or smartphone) and delayed, by streaming 'on demand' content or by using specific TV viewing apps. It goes without saying that this profile loves to watch TV content, and this is even more apparent during the weekends.

Media innovators have a high and diverse use of computer and Internet. In addition, all media innovators have a tablet. They use the tablet frequently and for a large variety of applications. E-mail, searching for information and visiting social media are the top three activities.

Also in the field of telephony, this profile is the most innovative. As smartphones and mobile Internet seem to be standard equipment for media innovators, this profile is also the most advanced in terms of mobile telephony. They also have more paid apps installed than the other profiles.

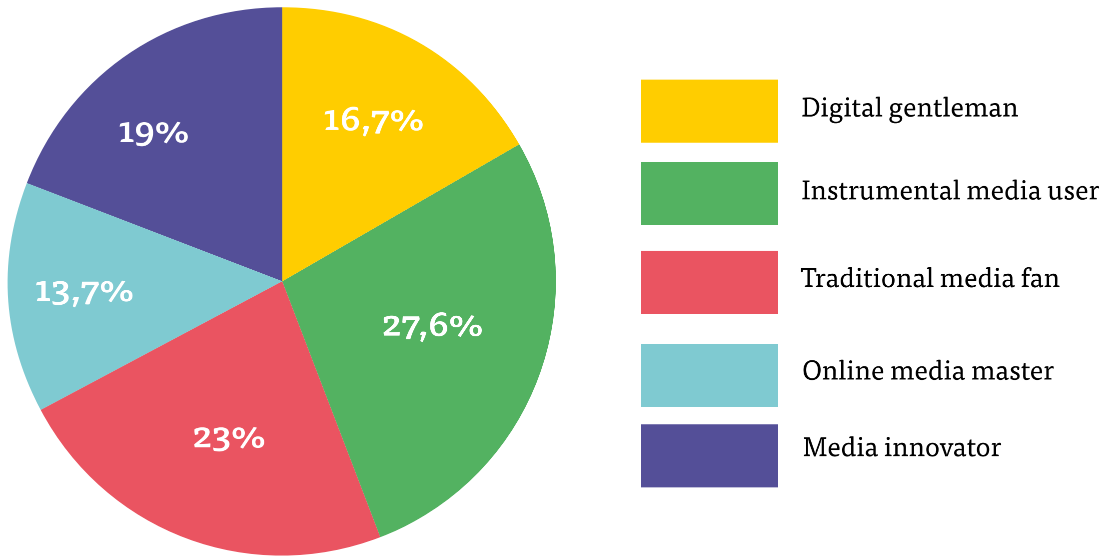
All media innovators are present on social media, spend the most time using them and are the least concerned about their privacy. They often have three or more accounts and are likely to agree that they can't pass a day without social media.

Although many media innovators have game consoles, their gaming is not limited to these devices, as they also use computers, mobile phones and tablets to game on a regular basis.

They use about every channel to stay up-to-date, but for reading the newspaper they prefer the tablet to the printed newspaper.

Media innovators usually have five home screens.

Digimeter profiles



Graph 38: Digimeter profiles (%; N=3.519).

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