MEASURING DIGITAL MEDIA TRENDS IN FLANDERS

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iMinds | digiMeter

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PREFACE

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

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

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

With the Digimeter project, iMinds Living Labs intend to gather and share data and information regarding the Flemish media and ICT user on a systematic and annual basis, adopting a representative methodology. This provides iMinds researchers with reliable data and information regarding the adoption and diffusion of (new) media and ICT, and the latest trends, habits and practices. This report serves as the public summary of this data[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 profiles of end users who agree to be involved in further innovation and user research (i.e. Living Lab research facilitated by iLab.o). This user database is available for SME's, organizations and companies for research in collaboration with iMinds-Living Labs. The management of this Digimeter user panel is taken care of by the panel management staff of iMinds - Living Labs.[2]

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

[1] For more information regarding the in-depth analysis of these data, please contact Lieven De Marez (lieven.demarez@ugent.be) or Bart Vanhaelewyn (bart.vanhaelewyn@ugent.be).
[2] Panel management can be contacted through panel@iminds.be or +32 9 331 48 00

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

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

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

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

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

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

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

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

DIGIMETER METHODOLOGY

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

- This is the seventh report of the Digimeter which monitors these evolutions anually.

- To allow for representative results for Flanders, a minimum quota sample of N=1500, based on the most recent federal statistics[3], is defined by province, gender, age (15+) and education level. The total dataset is weighted based on the last three variables. This is a modification compared to previous waves, where education level was no sampling quotum or weighing variable. In the last two years we saw a rising participation rate of higher educated people. To prevent a bias in the results, education level has been incorporated in the sampling quota and the weighing of the final dataset.

- In the period August 2014 - September 2014 2.028 individuals have completed the survey. 871 were collected 'offline' by means of CAPI-interviews (Computer (tablet) Assisted Personal Interviews) or PAPI (Paper And Pencil Interviews).
  1.157 respondents filled out the survey online
  (CAWI - Computer Assisted Web Interviews).

- The median time for filling out the online survey was 22 minutes 42 seconds.

- The survey consists of eight thematic chapters: TV, computer, tablet, telephony, social media sites, playing games and traditional media (radio, music and following the news) and finally general media use. Depending on their answers, respondents were directed to more questions regarding applications and other information regarding these technologies and media types. This way, Digimeter provides quantitative insights into the adoption diffusion as well as in the use diffusion of (new) media and ICT. The survey was concluded by a list of socio-demographic questions.

[3] The Belgian Federal Institute for statistiscs: FPS Economy - Statistics and figures
(Dutch: FOD Economie - Statistieken en analyses)

- Just like every previous wave, the report concludes with a segmentation of the Flemish population. For this analysis, a K-means cluster analysis was used, based on 8 variables measuring the variety of use (TV, Computer, Tablet, Smartphone, Social Network, Games, Music and News) and 6 variables measuring the frequency of use (TV, Computer, Tablet, Social Network, Games and News), to construct 5 segments.

- Digimeter gives a snapshot view of adoption and use of media and ICT. It is also based on the self-reporting of media consumers; as such, the results should be interpreted as the perception respondents have of their media consumption. The methodology does not allow to make assumptions on the effective reach of media.

- The survey investigates the adoption of devices within the household: Who has access to a device or service in her/his household? We do not measure personal ownership of a device (except for mobile phones). Nor do we make assumptions on a pure household level (how many households own a device or subscription to a service). The latter would imply a totally different data gathering method and sampling quota.

- Numbers with a * added, report the evolution with regard to the previous wave. This evolution is expressed as percentage points (the absolute difference between two percentages). For instance: When adoption increases from 20% to 30%, that is an increase of 10 percentage points; expressed as a (relative) percentage, the same growth is an increase of 50% (because the growth of 10% is 50% of the starting point 20%).

- All respondents had an equal chance of winning vouchers with a total amount of €1.800.

GENERAL ADOPTION

MEDIA & ICT ADOPTION IN FLANDERS - 2009 TO 2014

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

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

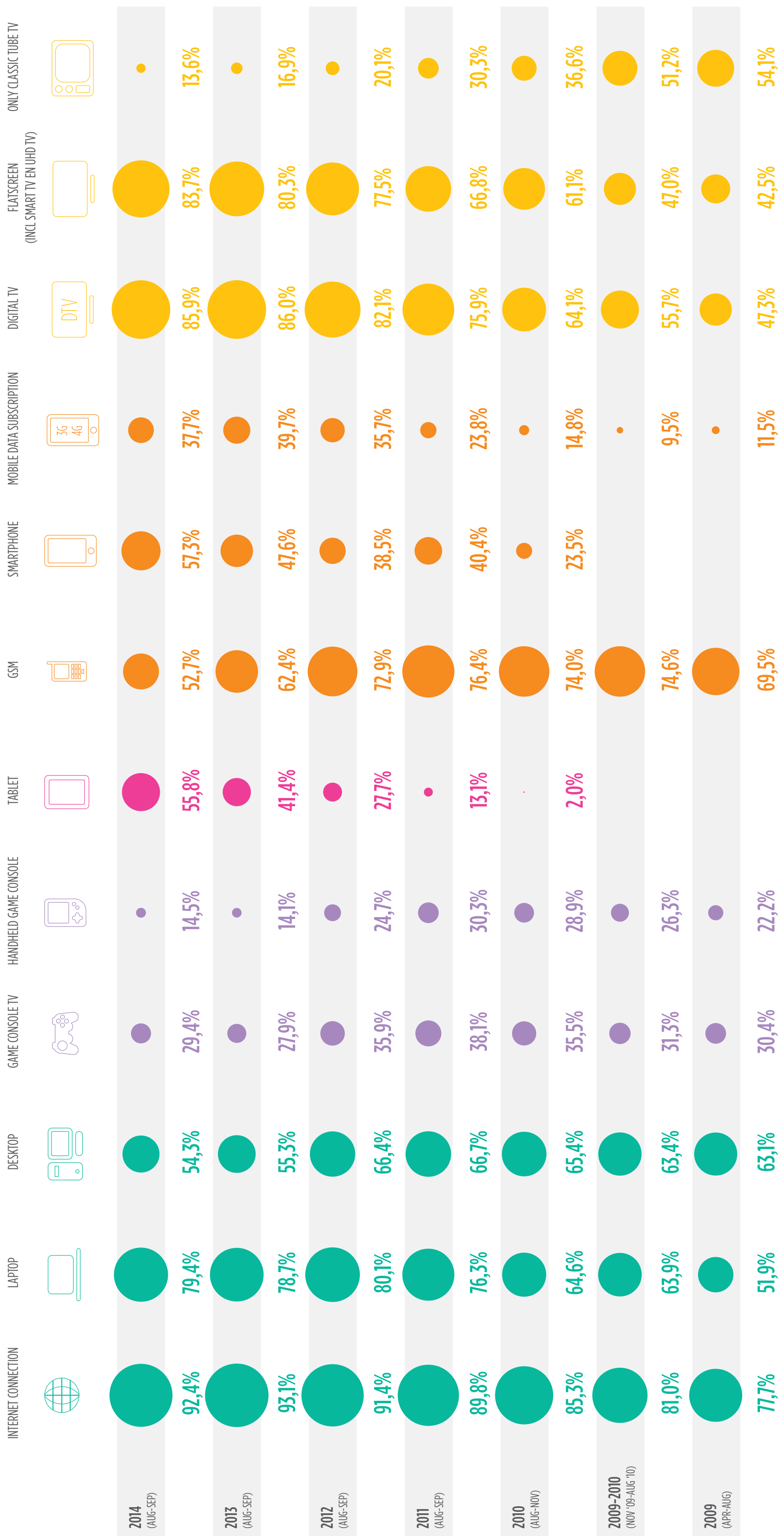
The adoption of tablets is still growing exponentially. Now 55,8% of the Flemish population has access to a tablet in their households. This shows an increase of 14,4 percentage points compared to last year.

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

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

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

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



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

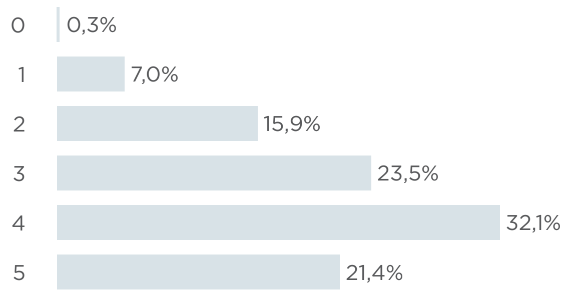
FACTS

MULTISCREEN

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

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

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



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

TELEVISION

DEVICES

- 97,3% own a TV set in their household.

- The classic TV tube is becoming a rarity in the Flemisch households. 13,6% of the respondents reported that the only TV set in the household was a TV tube (-3,3)*. Amongst the people aged 65 and older, the TV tube is the only TV set at home for over one out of three (34,6%).

- The drop in classic TV tubes has been compensated with a growth in adoption of flat screen TV sets. 83,7% have at least one type of flat screen TV at home (+3,4)*, mainly a normal flat screen (73,2%).

- A striking fact is that in 2014 a quarter of the Flemings (26,1%) reports having a smart TV at home. This results in an increased use of internet functionalities via a television screen, as 13,9% engage in internet activities on their television screen (+5,1%).

DIGITAL TELEVISION

- The adoption of digital TV subscriptions remains stable at 85,9% (-0,1)*.

- Electronic Program Guide (EPG) (59,5%), Ad skipping (51,7%) and Recording a program or movie (37,7%) remain the most popular digital TV functionalities on a daily basis.

- The ability to skip ads remains a popular feature of digital television. However, the willingness to pay extra for this functionality is slightly lower than last year. Half of the respondents would rather drop this feature than to pay extra (50,5%), which is 4,6 percentage points higher than last year.

- One in ten Flemings has access to a paid subsciption on a sports package, such as Belgacom 11. Almost one in eight has access to a movies or series video on demand service, such as Rex & Rio.

TELEVISION

WATCHING TV CONTENT

- 3,0% of the Flemish population never watches TV content on any device.

- More and more Flemings live in a multiscreen household. This multiscreen reality is translated in their viewing habits. 57,7% have already watched television content on a computer, 43,6% on a tablet, and 37,7% on a smartphone. Due to a modification in the exact formulation of the survey question, any comparisons of the 2013 versus the 2014 figures on this topic should be considered with caution, but nevertheless the advance of using tablets or smartphones to watch television is striking: in 2013 'only' 26,6% occasionally used a tablet to watch television content, and 18,4% used a smartphone.

- In other words, Flemings are fully exploring the possibilities of watching television content on different devices. Moreover, for a substantial amount of Flemings this has surpassed the level of experimenting, and has evolved to a daily routine: 14,8% state to watch television on a computer on a daily basis; for tablet and smartphone this is respectively 9,2% and 7,2%. Some of the Flemings use the alternative screens additionaly to a regular television screen (cf. the Media Omnivores segment at the end of the report) while others (especially the younger Online Media Masters) use the alternative screens as a partial substitution of the television screen. However, in general, the television set remains the absolute point of reference for watching television content, since for 78,2% of the Flemings the television set is the daily gateway to television content.

- 46,0% of the Flemish population reports watching 1 to 3 hours of TV daily on a television set. 29,8% watch TV content at least once a week on a laptop, 19,7% on a tablet, and 15,0% on a smartphone.

- The frequency of viewing TV content on alternative devices is clearly an age-related phenomenon. Over half of the respondents aged 15 to 29 years old claims to watch TV content on a laptop/desktop on a weekly basis. 30% of the people aged 30-39 years old says that they watch TV content on a tablet at least once a week, whereas 40,3% of the 15-19 year olds watches TV content on their smartphone at least once a week.

TELEVISION

- Watching television is becoming more and more a multiscreen activity, with 'the large television screen in the living room' still as a standard for the average Fleming. Due to the application of a self-administered questionnaire, Digimeter does not allow for drawing conclusions on the shares of the time spent on each of these devices, nor on the time spent watching live/linear programming versus timeshifted viewing. However, when we asked our respondents to what extent live/linear programming and timeshifted viewing are represented in their viewing behavior (regardless of the actual time spent and the device used), we can conclude that live television upholds its weight in the viewing habits of the Flemings. In fact, live viewing is even gaining ground (last year, 55,8% reported that they watch linear television programming every day, whereas this year, it has increased to 63,3%). This can be attributed to the increasing use of internet while watching television content, especially in online activities related to the television program they are watching (+13,7 percentage points). Moreover, 30,3% agree that messages on social network sites about programs can trigger them to actually watch that program (cf. the chapter regarding social media). 31,2% of the Flemings engage in timeshifted viewing as a daily habit.

- The way TV content is consumed is highly dependent on the age of the viewer. Watching live/linear TV remains popular within all age groups. Overall, 78,6% state to watch (at least once) live/linear tv on a weekly basis. However, it striking to see that timeshifting equals or even tops live viewing among the two youngest age groups. Among the 15-19 year olds respectively 70,1% and 72,9% state to watch live and timeshifted per week. Among the 20-29 year olds, this makes up for 61%. Among the 65+ segment, linear televison is by far the most common way to watch TV on a weekly basis (89,0%); less than half of the 65+ years old report watching in timeshifted mode (46,2%), and other types of viewing are rarely done on a weekly basis by the oldest age group (< 6%).
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TELEVISION

USING THE INTERNET WHILE WATCHING TV CONTENT

- The usage of the internet while watching TV becomes more and more a common practice. 69,8% say that they have engaged in an online activity while watching TV at least once last month. Last year this was 53,8%. However, comparing both waves should be adressed with caution, as the formulation of the question has been modified. This wave, we asked if the respondents engaged in internet-related activities while watching TV 'during last month', whereas in the previous wave the timeframe was less specific as we asked if they 'occasionally' engaged in internet-activities while watching TV.

- There has been a remarkable shift in reasons to use the internet while watching TV. The most common practice at 61,0% is still to engage in actions not related to the program (such as checking e-mail, checking newsfeed on social media, consuming digital news, playing games,...), but this is remarkably lower than the 84,2% of last year. Program-related internet activities on the other hand have risen to 57,1% (coming from 43,4% last year)[1]. Especially looking for additional information or browsing to the website of the program are popular interactions with the program. The efforts of the broadcasters to stimulate multi-screen (inter)activity seem to pay off.

- Within the program-related activities, the largest increases for information-related activities are attributed to browsing on the program website (+23,3 percentage points)* and looking for additional info/images/videos of the program (+20,4 percentage points). This year, a quarter of the Flemings indicate to have shared their opinions or engaged in online conversations about the program in the last month (+8,2)*. Voting or playing along with the program are less frequently done (9,8%) (+1,2)*.

- The most common device for using the internet while watching TV is the desktop or laptop. The use of mobile devices such as smartphones or tablets depends on the activity. Smartphones are more preferred for giving an opinion about the program, and for engaging in actions not related to the program (e.g. emails). Tablets, on the other hand, are preferred for searching for additional information or for surfing to the program website.

- Performing internet activities while watching TV is related to the age of the viewer: the younger the viewer, the more common the practice is. Nine out of ten people between 15 and 29 years old use internet while watching TV, whereas this is the case for only 36,5% of the people aged 65+.

- A quarter of the Flemings (24,9%) report having shared an opinion or having talked about the program via the internet (+8,2)*. Facebook is by far the most frequently used channel to express opinions while watching the program (69,6%). The use of a program-specific second screen app is far less common (4,2%).

FACTS

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

COMPUTER

- Having access to a computer (92,0%) and to the internet (92,4%) in the household has reached a saturation point in Flanders. The adoption of desktops (54,3%) and laptops (79,4%) is similar to the situation in the previous wave (resp. -1,0 and +0,7 percentage points).

- Most people who do not have a computer at this moment, never had one in their household. The main reasons for not having a computer, are lack of computer-related skills (45,1%) and lack of interest in computers (32,7%). The perception that computers are too expensive, is less often stated as a reason for not having a computer this wave (6,8%) compared to last year (13,3%). This indicates that the digital (computer) divide is becoming more and more an issue of skills, and less an issue of financial means.

- People not having a computer are generally older than 65 and retired, lower educated, single without children or widow(er)s, and tend to have lower incomes.

- Most people who don't have an internet connection at home at the moment, never had one in the past. Reasons for not having an internet connection at home, are similar to those for not having a computer. More often it is a case of lacking skills and interest in the internet, and less often of a cost-related issue. Moreover, privacy-issues are rarely reported as a reason for not having an internet connection (2,6%, - 1,5 percentage points compared to the previous wave). Similar to the profile of non-adopters of computers, it seems that people not having an internet connection in their household tend to be older than 65 and retired, lower educated, single without children or a widow(er), and with a lower net income.

- Most people use a computer on average 1-5 hours per day (41,7%). Almost a third of the population (31,2%) uses a computer more than 5 hours a day, and 17,6% report using a computer more than 8 hours a day. People using a computer more than 8 hours a day are most likely men between 20 and 49 years old, white-collar workers or higher management or self-employed, married or living together with children, and having a higher net income.

- Over eight in ten uses the computer on a daily basis. The most common daily activities are e-mail (77,6%), searching info (70,8%) and visiting social network sites (52,1%).

- More than half of Flemish music downloaders state that their music downloads are mainly or exclusively done on a legal basis (53,7%), which is slightly down from last year (-3,2)*. Downloading movies or series is less likely to be done on a legal basis (38,1%) (-4,4)*. Half of the downloaders state that they only or mainly download movies or series in an illegal manner (49,1%) (+3,1)*, whereas this is the case for only one third of the music downloaders (33,9%) (+3,4)*. In short, we see that music is mainly downloaded legally, whereas movies and series are more often dowloaded on an illegal basis. However, both for music and for movies/series the proportion of people that claims to legally download content is decreasing, whereas the proportion of illegal downloaders is increasing.

TABLET

FACTS

- The adoption of tablets keeps on growing. At this point, 55,8% of the Flemish population has access to at least one tablet in their household. Almost 8% of those having access to a tablet, report that they never use it themselves (in that case, the children are most likely to be the users of the tablet). As such, we can state that 51,5% of the Flemish population has access to at least one tablet in the household, and uses it her-/himself.

- 20,6% of the respondents report having access to multiple tablets, and 2,1% has more than 3 tablets in the household.

- Half of the tablets are iPads (Apple iOS). However, the share of iPads is dropping, as last year 53% of the tablets ran on iOS, and in 2012 this was even 66%. This decrease corresponds with the fact that global sales figures of iPads have decreased.
  38,1% of the tablets run on Adroid. Windows tablets have almost doubled their share, from 4,4% in 2013 to 8,5% this year.

- The segment of tablet adopters is slightly more male compared to the total Flemish population, and 65% of tablet owners is younger than 50. Furthermore, tablet adoption is higher among the higher educated, who are either white-collar workers or C-level managers, married or living together with children, and coming from larger family sizes.

- The purchase intention for tablet remains high: 29,0% of the population is considering to buy one in the following 12 months (6,8% is convinced to buy one, 22,2% is still in doubt). The total intention (including those who doubt) is slightly higher for those who don't have a tablet yet (32,4%) than for those who already own one (26,2%). If a significant group of those still in doubt becomes convinced to buy one, then tablet adoption will still be on the rise next year.

- Most people owning a tablet, spend on average 1 to 3 hours a day on a tablet. 8,7% are heavy users of tablets, and spends at least 3 hours a day on their tablet.

- Although tablets can be connected to the internet in various ways, the most common type of internet connection for tablets is the WiFi-network at home or elsewhere (89,1%). 15,4% have a mobile internet connection for their tablet using a SIM card (via subscription or via prepaid card), which is approximately the same as last year (+0,2)*.

- Emailing (reading 52,1% and sending 38,7%), searching for info (46,3%) visiting social media (40,1%) and reading news sites (37,4%) are the most popular daily activities on a tablet.

- 55,0% of the tablet users has paid for apps in the last 12 months. People paying for tablet apps are most likely males between 30 and 50 years, white-collar workers or C-level managers with higher education and higher income, and living together with their partner and children.

TELEPHONY

- Fixed telephony has decreased 2,9 percentage points compared to last year, but is still available in the households of almost seven in ten Flemings.

- Mobile phones have saturated at 96,2%, but we see a remarkable difference between smartphones and regular GSM's. Whereas smartphone adoption has risen 9,7 percentage points to 57,3%, the adoption of GSM's has dropped at the same rate to 52,7%. As such, the adoption of smartphones has surpassed the adoption of GSM's for the first time.

- GSM owners tend to be more skewed towards retired women of 65 and older, lower educated and with lower incomes. Smartphone owners are more likely to be men younger than 50, and higher educated. Furthermore they are either white-collar workers/C-level managers, living together and having children, or are students living with both their parents and having no income of their own.

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

- More than half of the smartphone owners use their smartphone for reading emails (65,0%) and checking social media (56,6%) on a daily basis.

- Most smartphone owners still rely on mobile network subscriptions to make phone calls. Only 1 in 5 makes phone calls via web-based apps (eg., Skype, Facetime) on a monthly basis. Messaging is also largely via classic SMS: 70,1% report sending text messages via SMS every day, whereas 46,4% send messages via a web-based messaging app on a daily basis.

- Paying for apps during the last 12 months (buying app, in-app purchases or buying media-content) happened remarkably less often for smartphones (36,6%) than for tablets (55,0%).

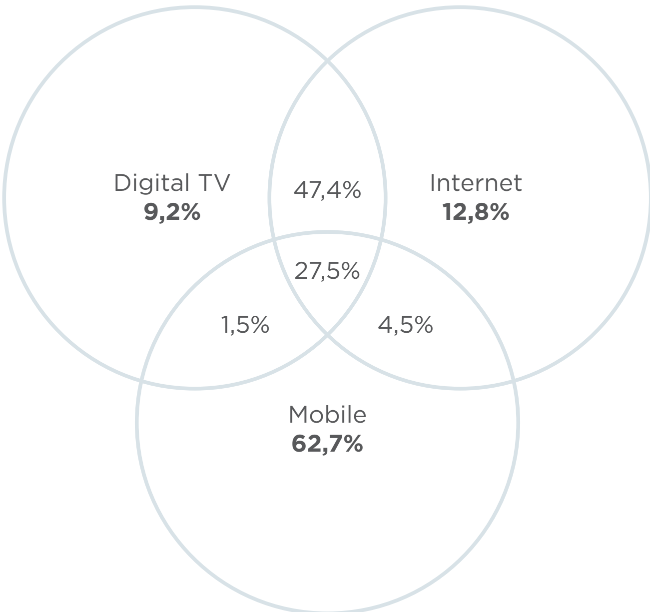
SERVICES

- 78,9% have access to digital television, internet connection and a mobile subscription (pre- or postpaid) at home. 27,5% have those three services as a package from the same operator.

- Digital television is available for 85,9% of the Flemish population. Most commonly this is bundled by the same provider in a package with an internet connection (47,4%). Only 9,2% have a stand-alone digital television subscription with a provider.

- Over nine in ten people (92,4%) have an internet connection at home. For 47,4%, this is bundled together with a subscription for digital television by the same provider. 1 in 8 (12,8%) has an internet connection that is not part of a package.

- 96,2% have a mobile subscription, most commonly not included in a package (62,7%). If they do have a mobile subscription as part of a package at the same provider, it is most commonly in combination with both digital television and an internet connection.



SOCIAL MEDIA

- The number of Flemish people with an account on a social media site is still rising: 78,7% have a subscription on at least one social media site (+2,0)*. Facebook (70,9%), YouTube (39,3%) and Google+ (39,1%) remain the top-3 social network sites.

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

- Those with Facebook accounts seem to be the most active users. 95,6% of those with a Facebook account logged in during the last month.

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

GAMES

- 62,4% have played at least one game in the last month (+1,0)*. The most popular devices to play games are computers (37,0%), tablets (31,3%) and mobile phones (30,4%).

- After years of a decreasing trend, the adoption of game consoles has stabilised to 32,5% (+1,7)*. Almost 3 out of 10 people report having a fixed console (connected to the TV screen), whereas 14,5% have a handheld gameconsole.

- Age is an important determinant for the segment of gamers (48,9% of the gamers is younger than 40, whereas this is only true for 14,5% of the non-gamers).

- Almost half of those who play games, play less than daily.

TRADITIONAL MEDIA

RADIO

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

MUSIC

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

NEWS

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

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

GENERAL MEDIA USE

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

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

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

PROFILES

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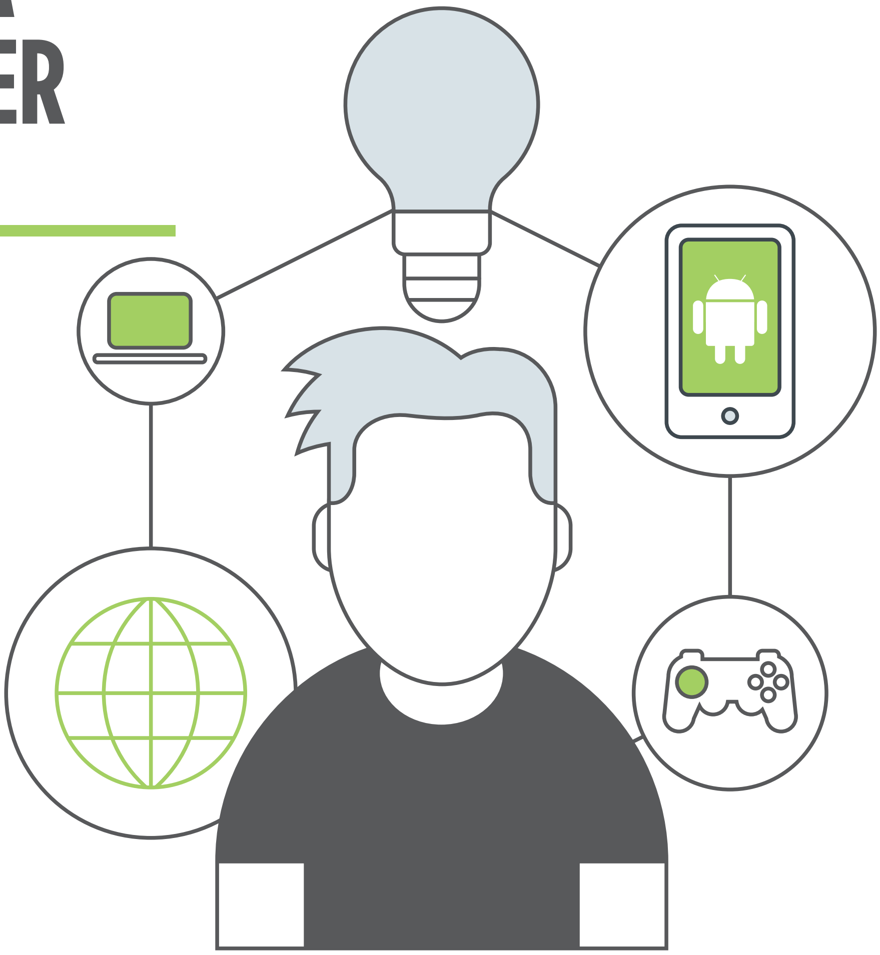
Like previous waves, we conclude this report with an overall segmentation of the Flemish media consumer. This segmentation is based on two factors pertaining to the consumers' usage of the following technologies and devices: TV, computer, internet, tablet, smartphones, social network sites, games, radio,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

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

The cluster analysis[6] resulted in five different profiles, which are comparable to the profiles that appeared in the study last year. However, we do see some remarkable shifts in sizes.

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

ONLINE MEDIA MASTER
(21,0%)



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

MEDIA OMNIVORE
(22,1%)

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

DIGITAL EXPLORER
(24,5%)

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

FUNCTIONAL MEDIA USER
(18,8%)

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

ANALOGUE MEDIA FAN
(13,6%)

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

DIGIMETER PROFILES