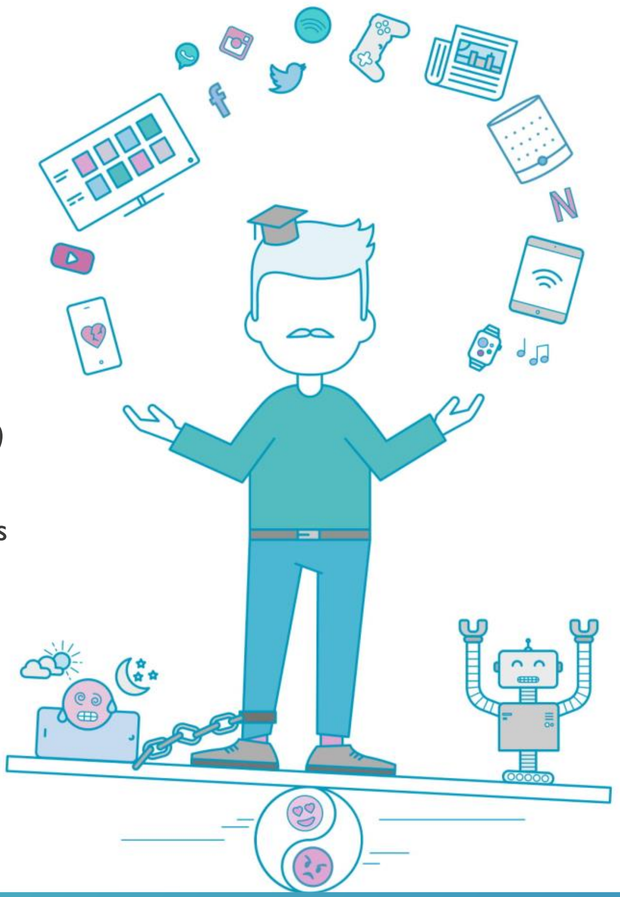
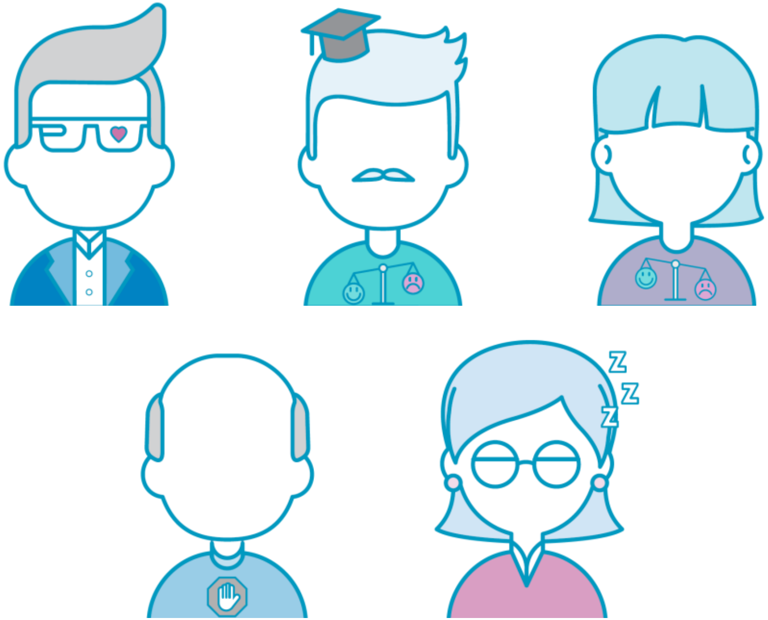
imec.digimeter 2019

Measuring digital media trends in Flanders



METHODOLOGY

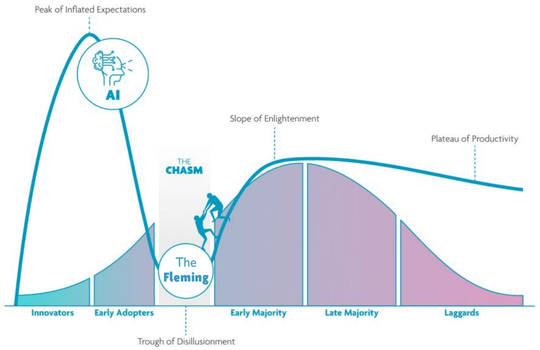
- Since 2009 imec.digimeter has been mapping trends in the **attitudes, adoption** and **use** of media and technology in Flanders.
- Each year 1.500+ Flemish citizens (+16) are questioned representative on age, gender, education and province. This year n=2.754
- Fieldwork from September to October 2019
- 3 groups of profiles are made based on a K-means clustering
- Differences between percentages are expressed as percent points



DIGITAL DISRUPTION

Catching waves, not tsunamis

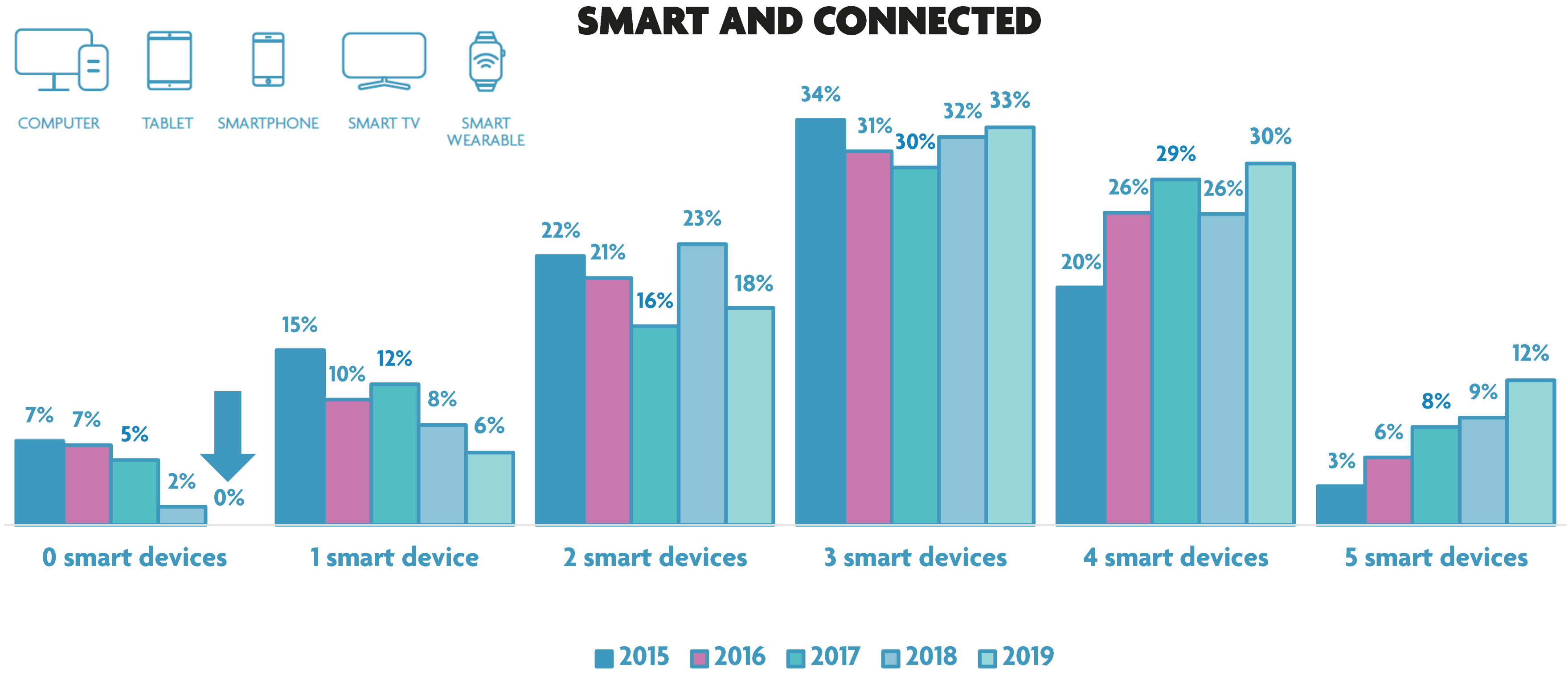
- Digital disruption is happening in waves.
  - First the internet and digital devices found their way into our lives. Afterwards the use of internet services such as social media and media streaming became mainstream. Non-media services also expanded to digital via the internet (ex. sharing economy, online shopping, digital paying, …)
  - The following waves will be driven by technologies such as AI and IoT. These waves however will be influenced by the feelings people experienced in previous waves. If the general public has not yet adopted, or accepted previous innovations and technologies, we risk of going too fast with implementing new innovations (=falling in the chasm)*



*Diffusion of Innovations (Everett M. Rogers, 2003)

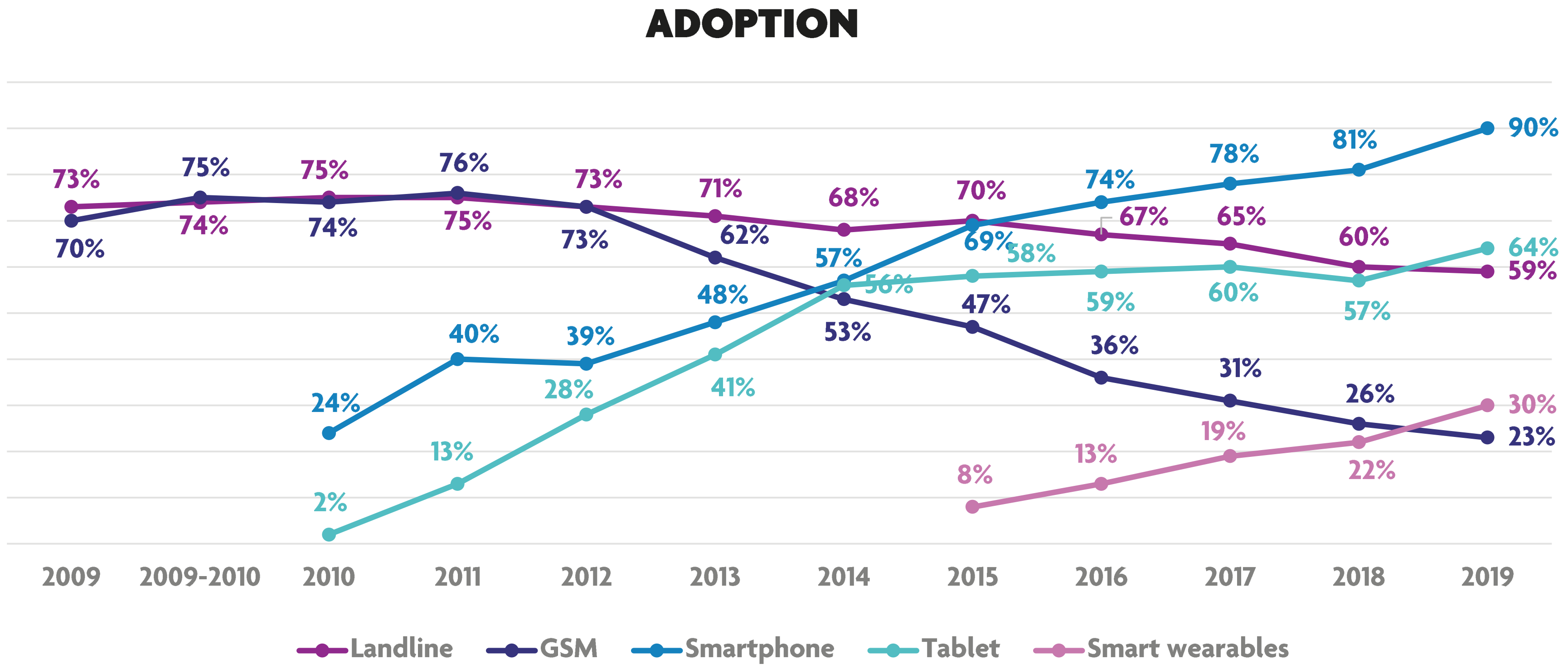
DEVICES

Smart, connected & multiscreen Flanders



DEVICES

The smartphone is the fastest growing device, other devices (wearables) are rising in their slipstream



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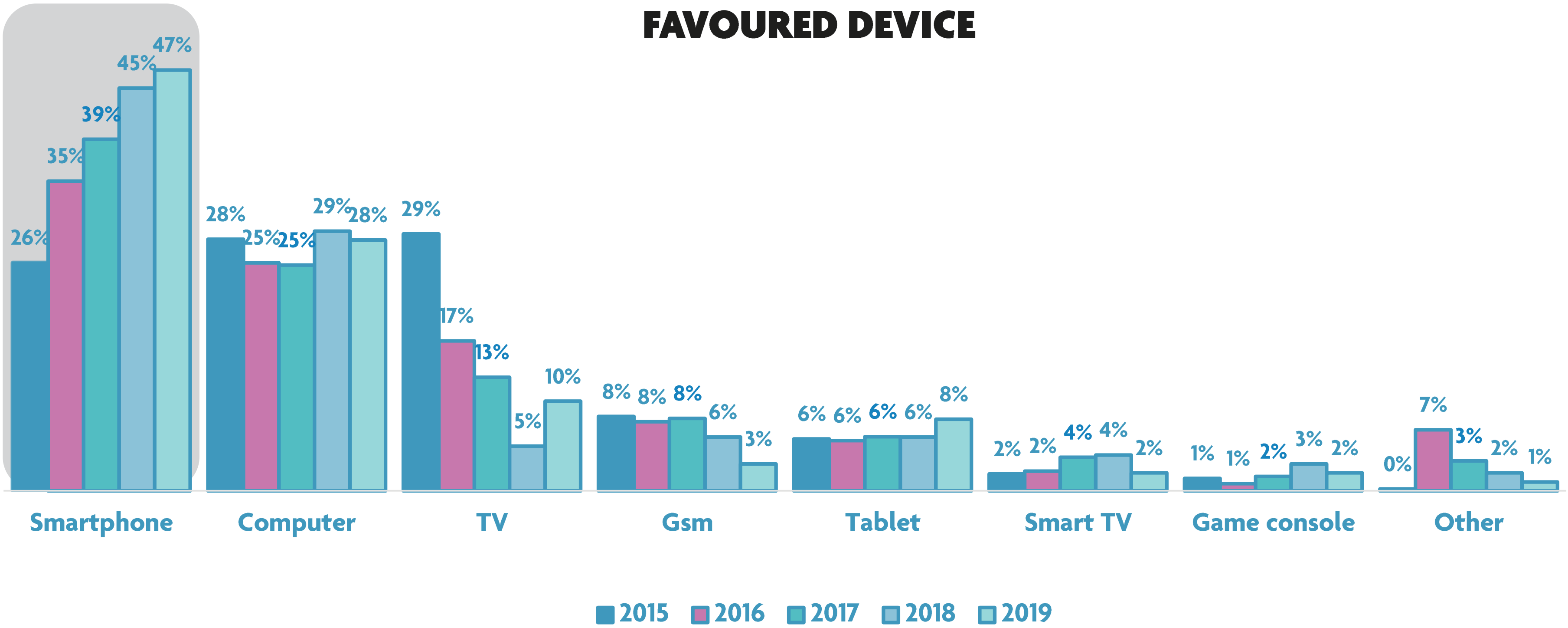
DEVICES

The smartphone is the most loved device in Flanders



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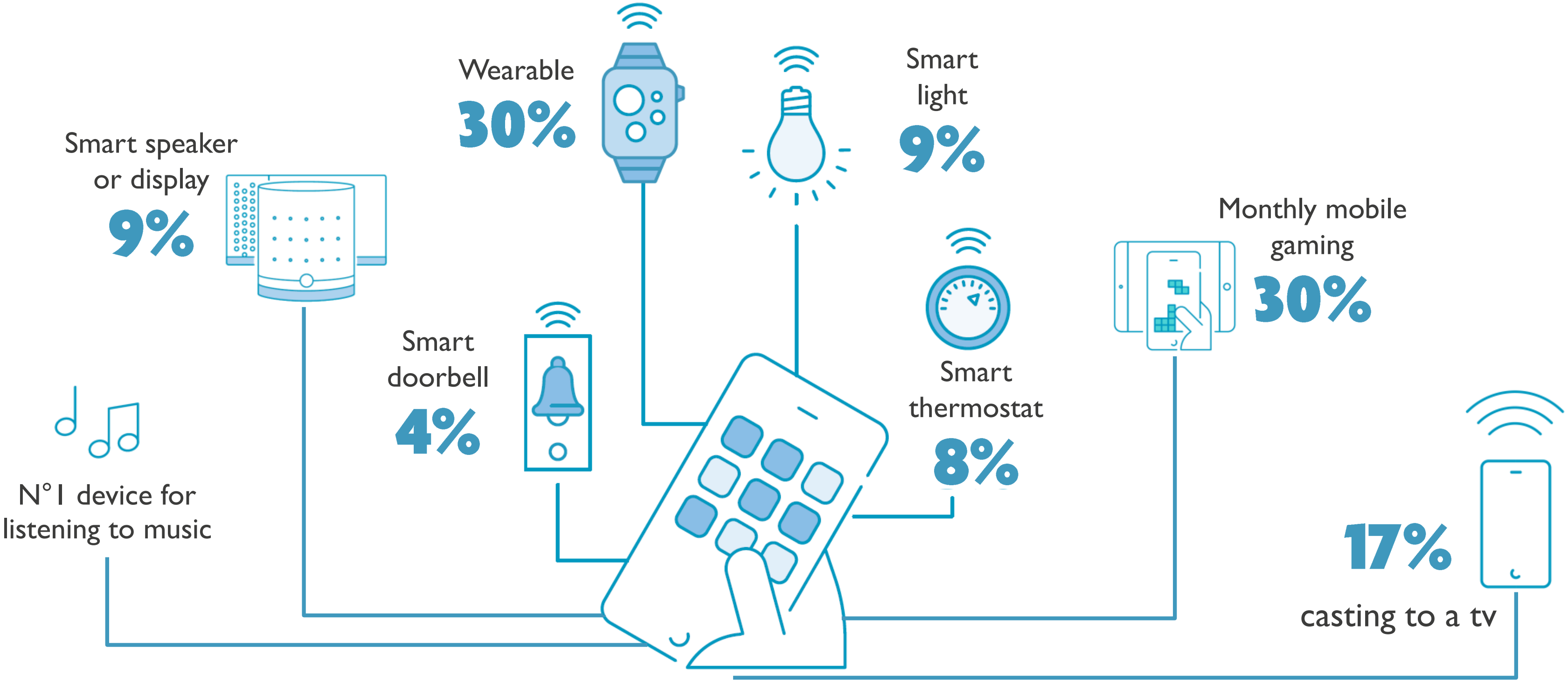
DEVICES

The smartphone is the quickest rising device but also gains more and more importance as a universal remote

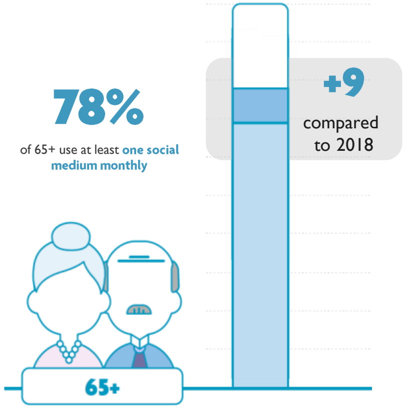


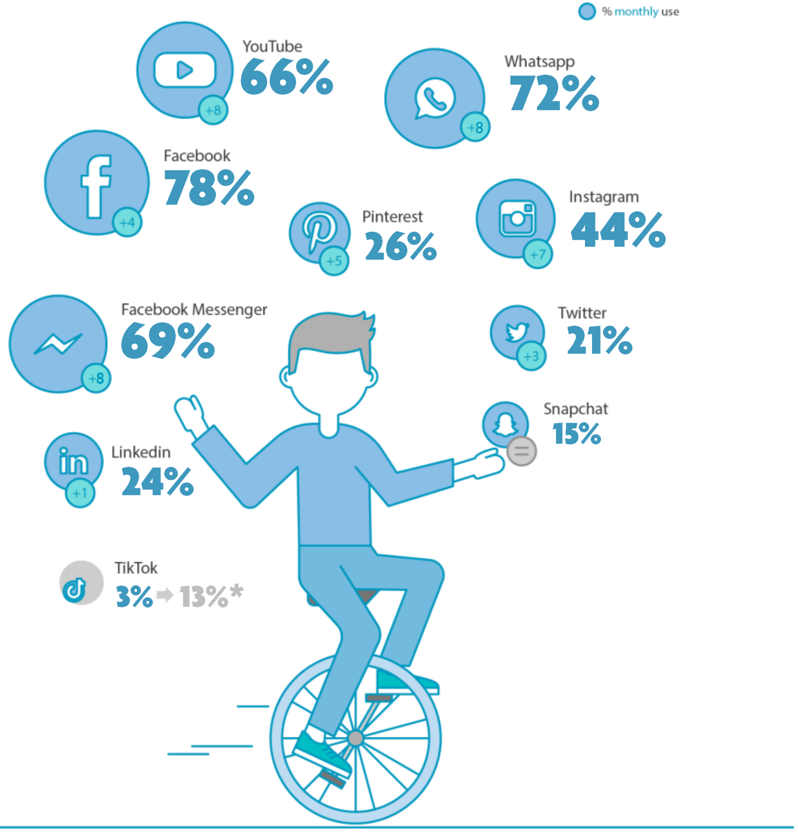
SOCIAL MEDIA

More time & more platforms

More people are using social media networks. 91% of Flanders use a network on a monthly basis, even citizens older than 64 years use monthly (78%, +9 in comparison with 2018).

57% use **4 or more social media**/chat services a day. In the youngest age category it's even 83%.





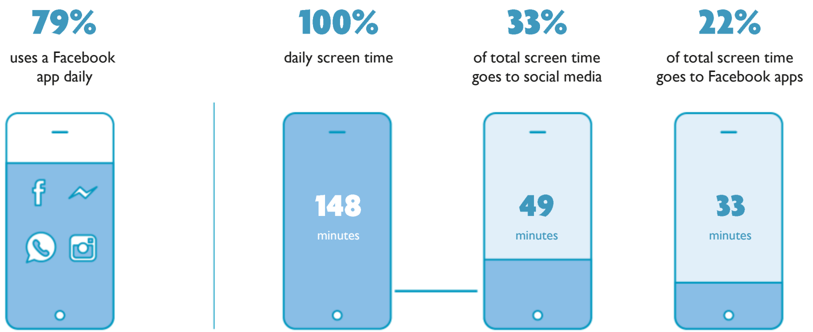
* MobileDNA indicates this platform is growing quickly

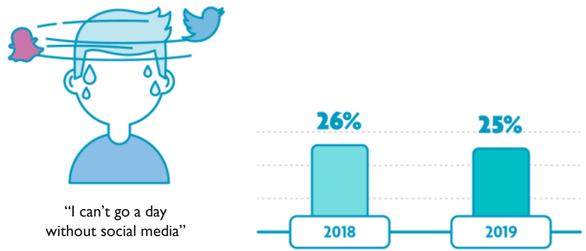
SOCIAL MEDIA

More time & more platforms

We spend a lot of time on these apps. The company **Facebook** demands most of that time. 79% states using a Facebook app on a daily basis. 22% of the smartphone screen time goes to a Facebook owned app.

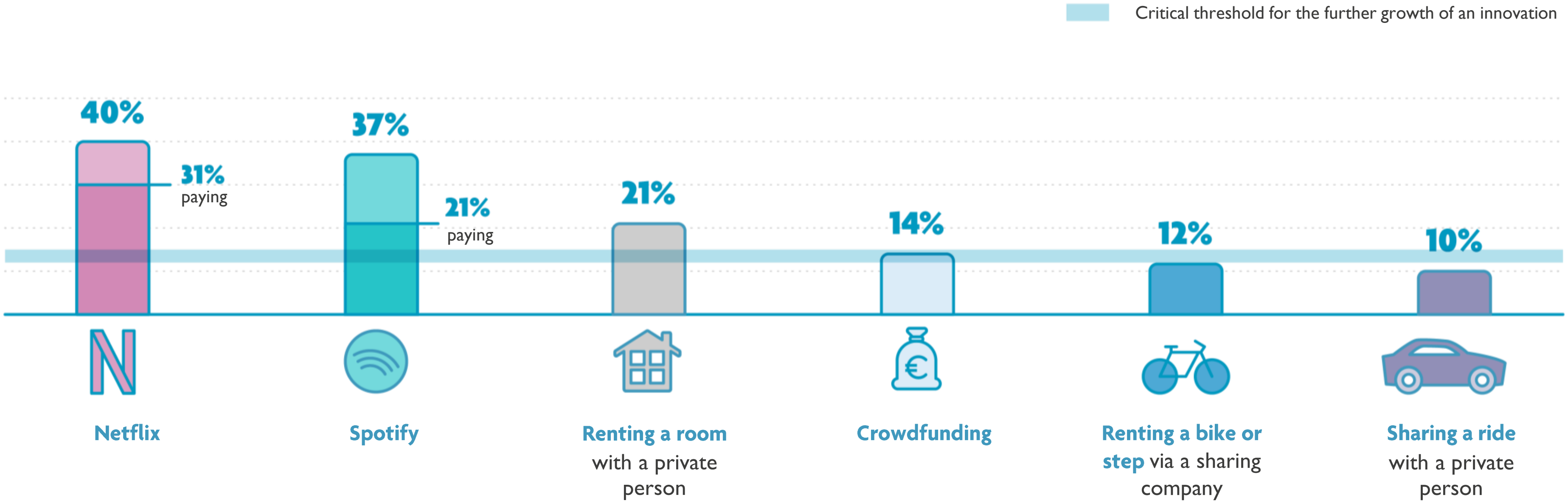
A lot of citizens are **struggling** with their social media use. 52% states it is too time intensive and 25% state that they could not go a day without social media.





ACCELERATION OF THE PLATFORMS

Platforms as Spotify and Netflix are growing fast. 21% is even paying for Spotify and 31% for Netflix



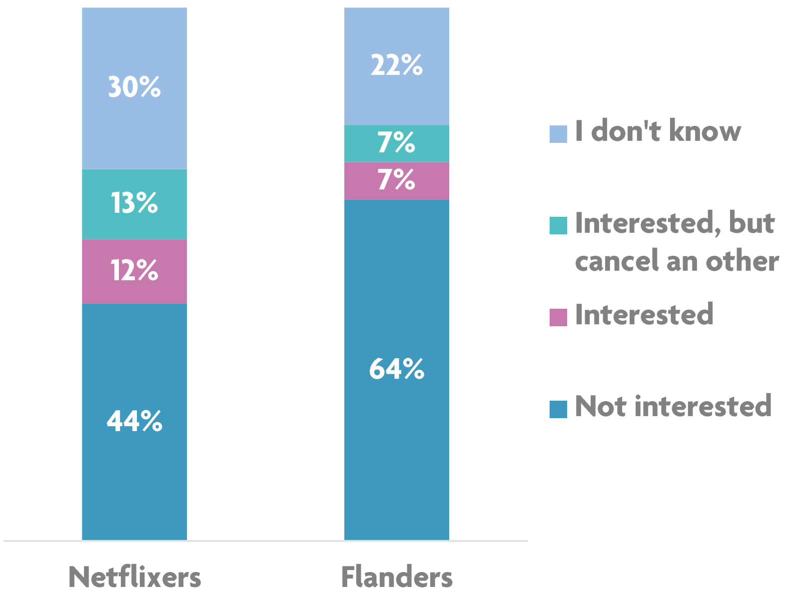
VIDEO – SUBSTITUTION

Flanders is more multiplatform

Streaming platforms seem to substitute each other.
Netflix has been the first mover in Belgium. Therefore it has taken a lot of the market share. However, now new players are moving in. Disney+ for example can convince 14% of Flanders.

Within the Flemish Neflixers, this share is even higher (25%). Half of those Neflixers even state they would cancel another subscription…

INTERESTED IN DISNEY+



CROSSMEDIA – CUMULATION

Classic media sources have a chance against new (streaming) services

Classic media sources found their spot next to these new services. The relationship between streaming platforms, such as Netflix, and classic media sources is not one of substitution. **Citizens seem to cumulate streaming platforms on top of classic media sources**.

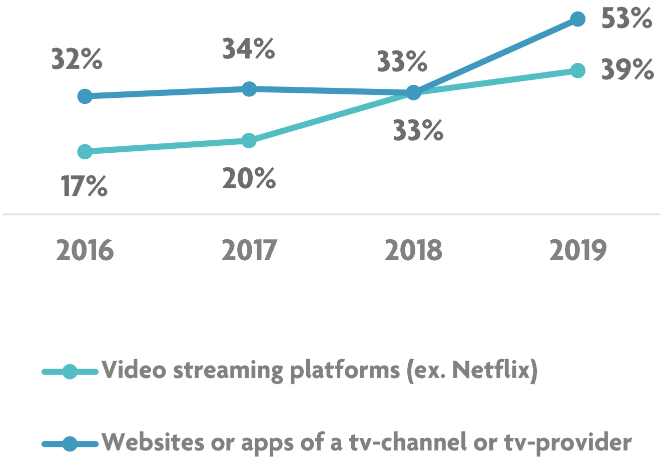
47%

watches live **television daily**

62%

listens to the **radio daily**
(only 29% for the youngest group)

MONTHLY VIDEO ONLINE



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CROSSMEDIA – CUMULATION VIDEO

There is no more television, only video experiences. Flanders watches on platforms, not channels. Therefore new video consumption habits arise. We distinguished 5 profiles:

25%

The classic Burgundian is the least digi savvy. For this profile watching video, is watching tv content on a tv screen. Their frame of reference is Flemish and they ignore online video services.

25%

The picky gastronome is younger and more digital but most importantly, is very selective. In contrast to other profiles, they are less attracted to the image culture. Video streaming services aren't of interest either.

23%

The generous glutton watches video on different screens and platforms. They combine classical television with online content of providers and channels, but also watch video on platforms as Netflix. This profile is most willing to pay for media.

19%

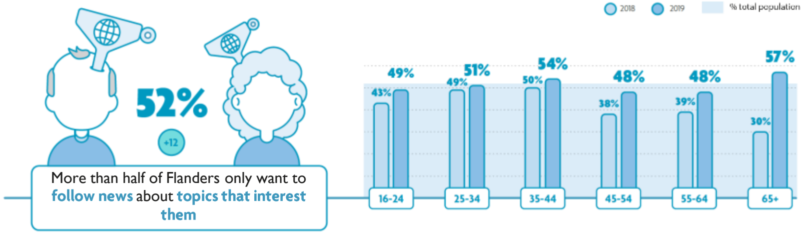
The worldly foodie is the least connected to Flemish television channels and has the most love for video streaming platforms such as Netflix and Disney+. This group together, with the online gorger, are the youngest ones.

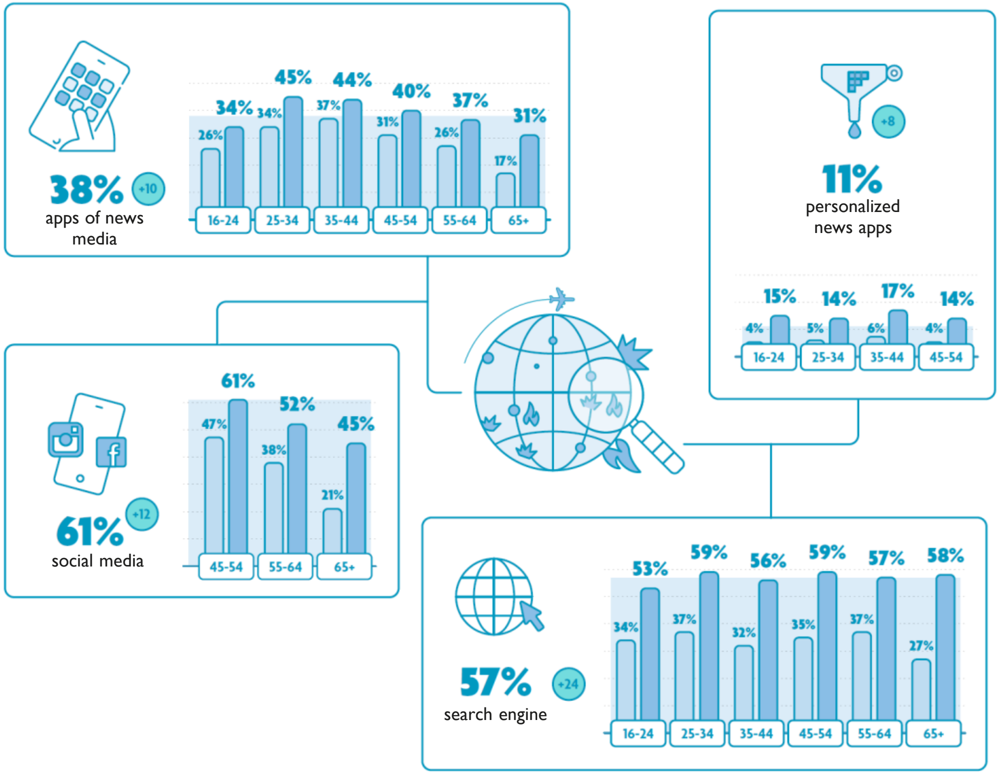
8%

Just as the worldly foodie **the online gorger** has adopted disruptive video habits. Their frame of reference is international but in contrast to the worldly foodie they are still a bit connected to Flemish tv-channels.

ACCELERATION OF DIGITAL NEWS

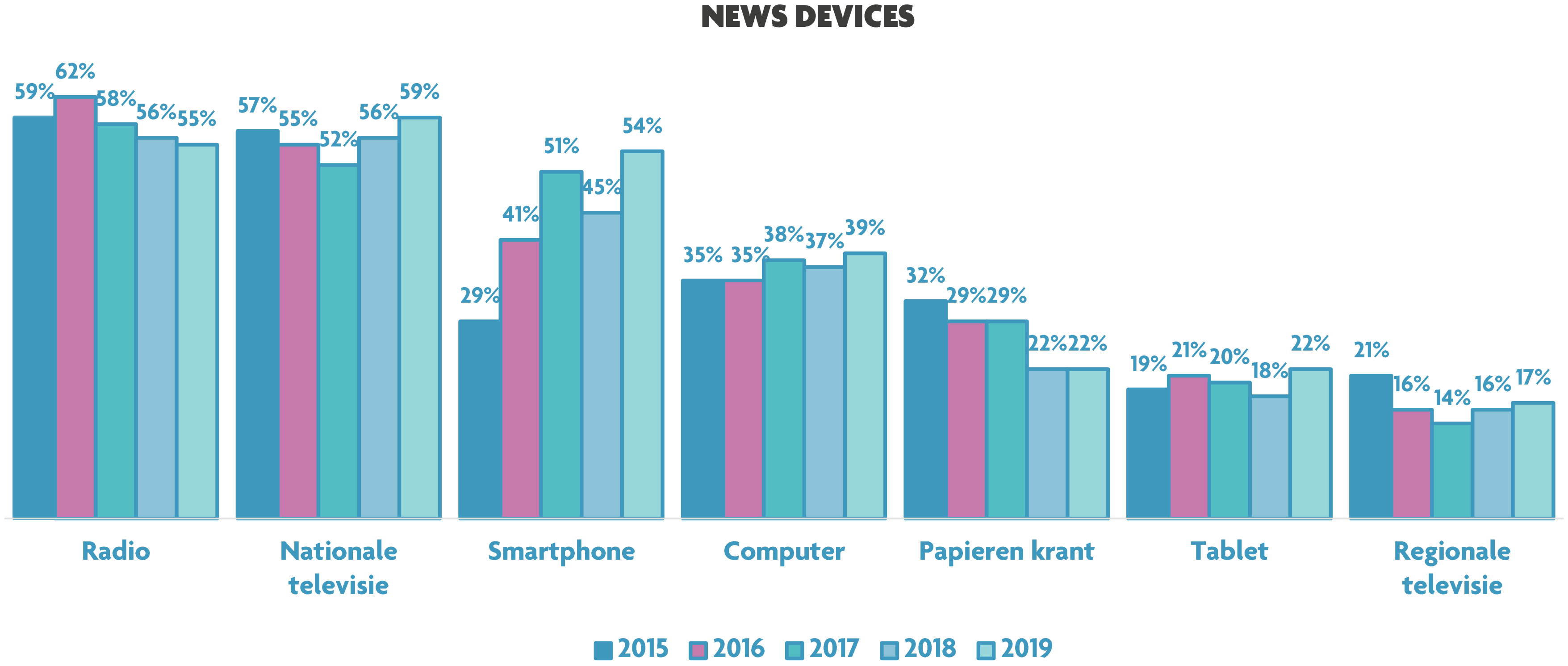
Digital and online news are the new channels on which Flemish citizens read. These channels can provide personalized news, which is desirable





CROSSMEDIA – CUMULATION - NEWS

In addition to the growth of these new news channels, traditional channels also continue to have their importance



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CROSSMEDIA – CUMULATION - NEWS

58% of Flanders is very interested in following the news

18%

The herding shepherd reads the news via digital channels. They give the most importance to news from known sources and are most willing to pay for news. They don't trust technology companies for news, but trust Flemish news brands.

19%

The classic church owl keeps up with the news by listening to the radio, watching television and reading the newspaper. Digital ways of reading the news aren't interesting for him.

21%

The devouring eagle reads a lot of news on different devices and via different sources. They are worried about fake news but trust in their skills to examine the trustworthiness of news articles.

26%

The social meerkat is the youngest and most disruptive profile. They don't have an extended news diet. When they do read the news it's on social media and really personalized.

17%

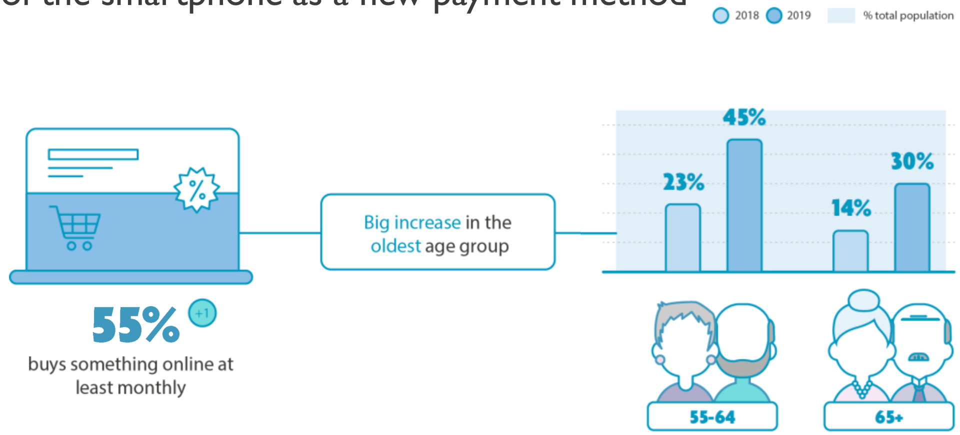
The cold frog is the least interested in news. This profile is a mix of younger and older citizens. In general this group has the lowest trust in news.

ONLINE SHOPPING & PAYMENT METHODS

Online shopping is becoming a habit and the importance of the smartphone as a new payment method

Online shopping is getting more and more adopted, and it is becoming a habit.

Not only for media the **mobile entry point** is of great importance. Also when studying new payment methods and online shopping this importance arises.



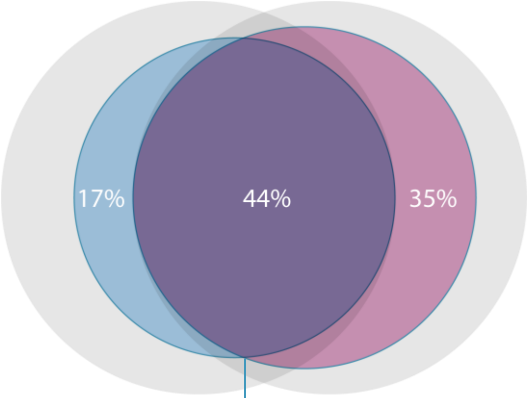
MONTHLY PAYMENT METHOD

DIGITAL STRUGGLE

Past digital waves have left people with certain feelings and attitudes. We identified some dual feelings in Flanders

61%
are worried about their online privacy

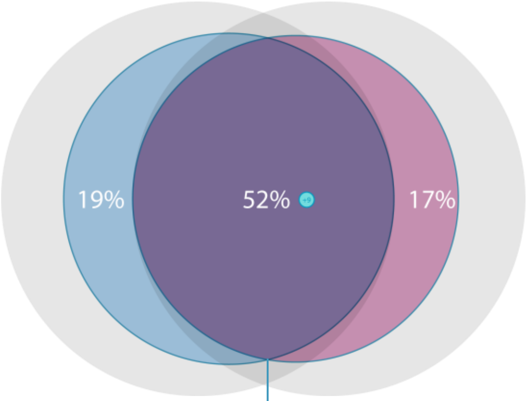
79%
only read the terms and conditions once in a while



are worried but only reads the terms and conditions once in a while

71%
state being better informed thanks to the internet

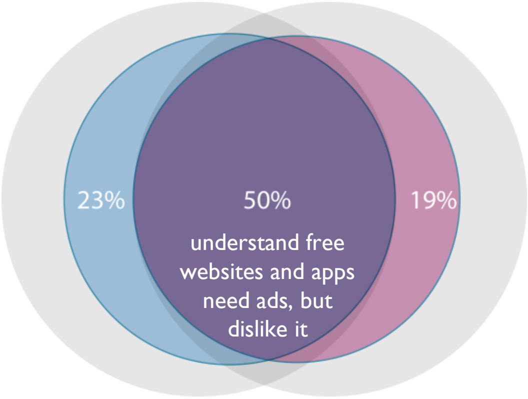
69%
state being worried about the impact of fake news on society



state being better informed but also states being worried

73%
state that ads on free websites or apps are annoying

69%
understand that free websites and apps rely on ads to survive



DIGITAL STRUGGLE

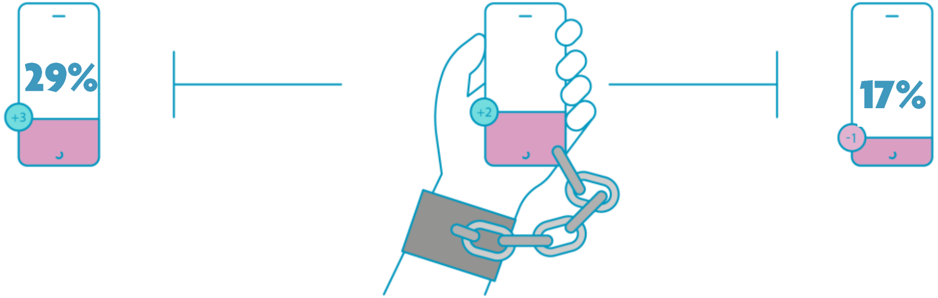
Past digital waves have left people with certain feelings and attitudes. A great deal of Flanders feels dependent on their smartphone and social media

"I think I spend **too much time on** my smartphone"

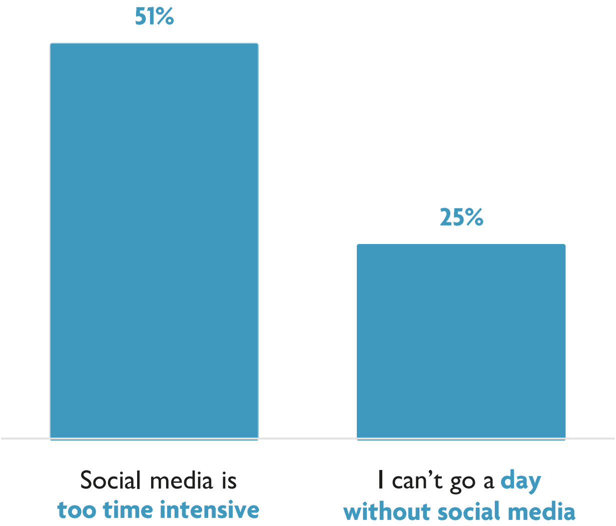
33%

is **smartphone dependent**

"I feel **addicted** to my smartphone"



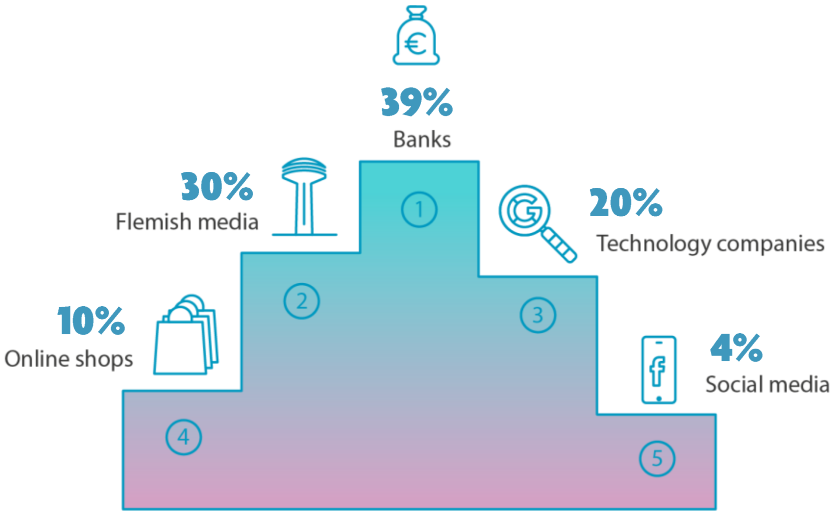
SOCIAL MEDIA



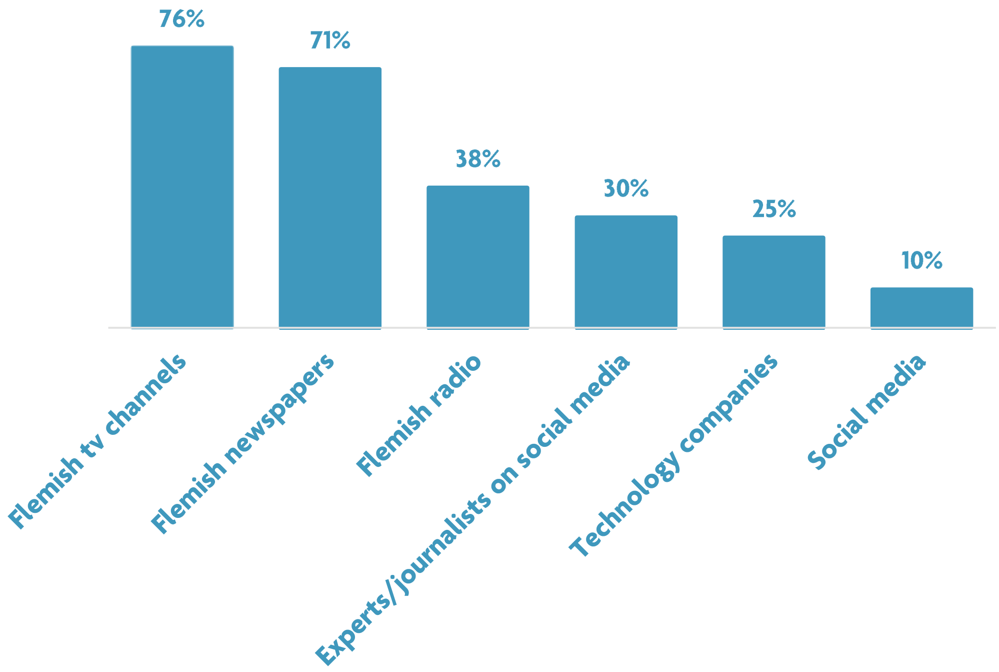
DIGITAL STRUGGLE – BEACONS OF TRUST

Past digital waves have left people with certain feelings and attitudes. Flemish media companies have opportunities as beacons of trust

TOP 2 COMPANIES FLEMISH CITIZENS TRUST WITH THEIR PERSONAL DATA



NEWS TRUSTABILITY



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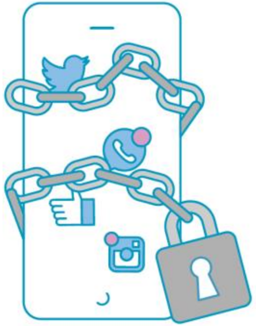
DIGITAL STRUGGLE – TAKING CONTROLE

Past digital waves have left people with certain feelings and attitudes. Some negative, and for these feelings a lot of people are taking action in their own hands

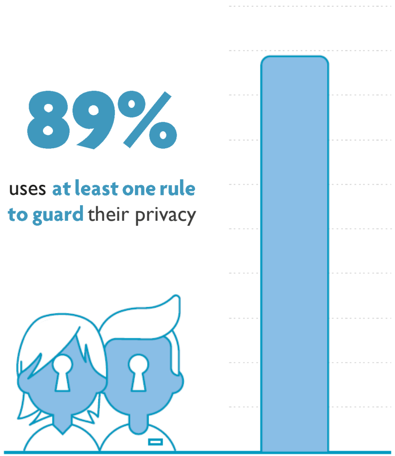


82%

imposes rules to control their smartphone usage

89%

uses **at least one rule to guard** their privacy



When I read a news article I think it's important the article is from a **known source**

I sometimes **check** how reliable a news article is

HATE-LOVE

Based on these experiences and the attitudes and skills citizens have concerning digital technologies, we can distinguish 5 profiles that can be places on a 'love-hate'-continuum

18%

The passionate lover has a great love for technology, believes in its advantages and opportunities and doesn't worry much about potential negative aspects of technology. They have enough skills to handle all kinds of technology. Their relationship with social media and the smartphone is balanced. Privacy isn't much of an issue for the passionate lover and together with *the close friend* this profile owns the most devices and uses them the most.

16%

The close friend shows a 'love-hate' relationship with technology, but in the end the 'love' side prevails. They are convinced of the value technology can bring. On the one side they state that technology connects, internet informs and smartphones win them extra time. But on the other side they struggle to find a good balance in their social media and smartphone usage. Concerning privacy this profile is more than others willing to trade personal data for other advantages. Just as *the passionate lover* they own and use a lot of devices and have skills and knowledge concerning digital technologies.

25%

It's complicated also struggles with it's relationship with technology, but here the 'hate'-side seems to prevail. This profile sees the advantages of social media, the smartphone and other technologies, but worries about the negative aspects linked to digital technologies. They have a lower trust in their digital skills and don't see privacy as a tradeable good. They score average on the ownership of technology, but use their smartphone very intensively with a feeling of dependency as result.

HATE-LOVE

Based on these experiences and the attitudes and skills citizens have concerning digital technologies, we can distinguish 5 profiles that can be places on a ‘love-hate’-continuum

20%

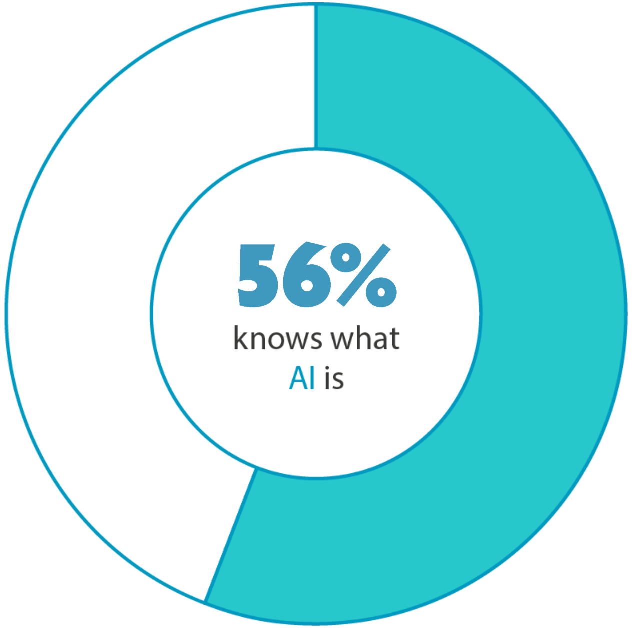
The happy single has a negative attitude toward technology, and therefore keep some distance from it. They have low trust in their digital skills and their relationship with their smartphone is not that good. They hate it when people spend too much time on their smartphone and are worried about the possible radiation of smartphones. Social media is too time intensive, bad for your privacy and doesn't connect people. Privacy is seen as the greatest thing, and controlling it is very important. They score average on the adoption of digital devices. Their negative attitudes don’t steam from ignorance. This profile has some knowledge on digital technology, but much lower in comparison with the two ‘love’ profiles.

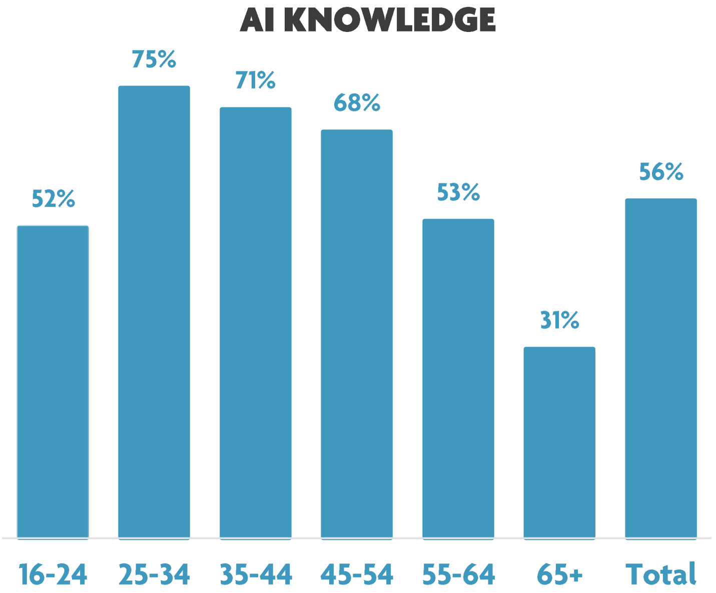
20%

The distant acquaintance is a group of older citizens with a lower education, which seems logical. But less logical, and more concerning is that this profile also contains a group of youngsters that are giving up on technology. This profile is indifferent to technology and, as it were, dissociates itself from it. The distant acquaintance mainly has negative feelings about digital technology, social media and privacy. This profile also has the lowest confidence in his own digital skills and the lowest knowledge about digital technology. We also notice this indifference in the low adoption rates for digital media devices, which is the lowest of all profiles. In terms of knowledge of digital technologies, this profile also scores much lower than others.

AI

Knowledge gap: 56% (thinks to) knows what AI is (+3), but there is a surprising difference between age groups





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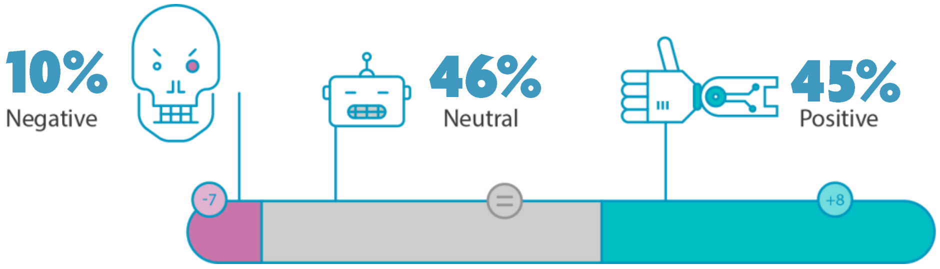
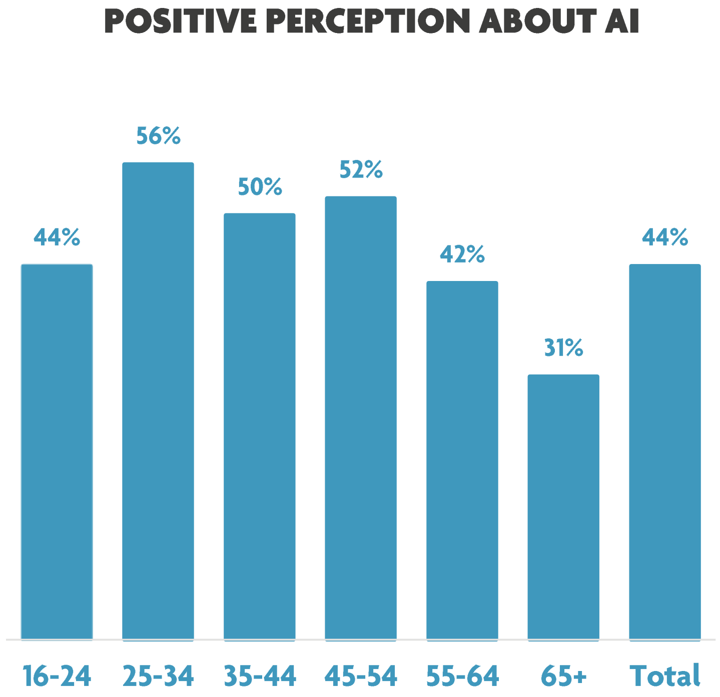
AI

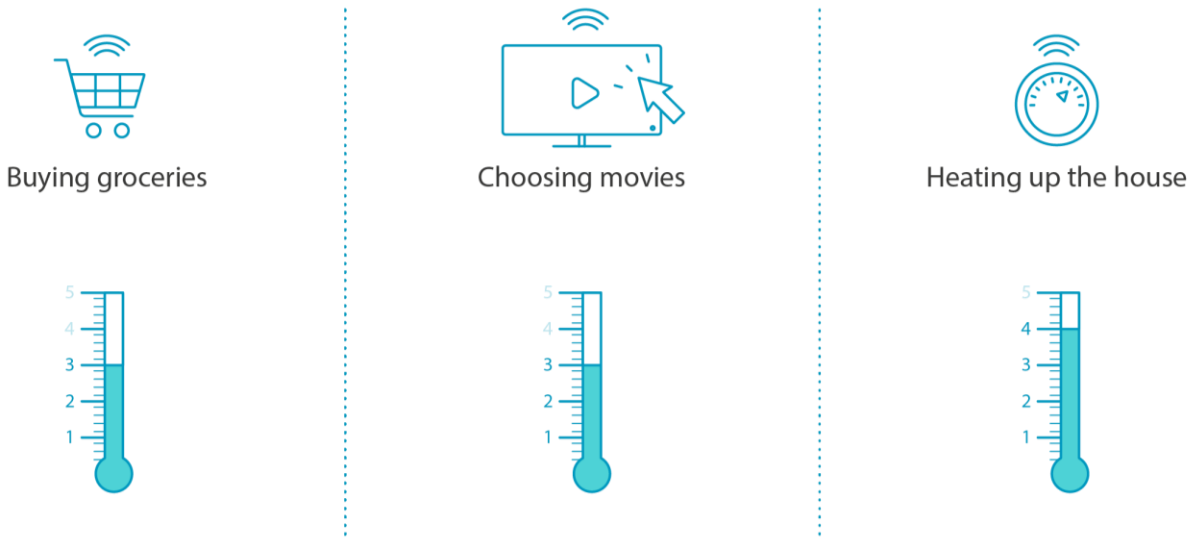
45% is positive about AI, but the largest group of citizens is still doubtful about his feelings concerning AI

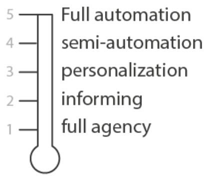




AI

AI can have a great impact on the daily lives of citizens, for example by automating in a smart way. To study how Flemish citizens would perceive this automation we gave them a couple of cases. Results of digimeter clearly show that this automation is case and person specific.

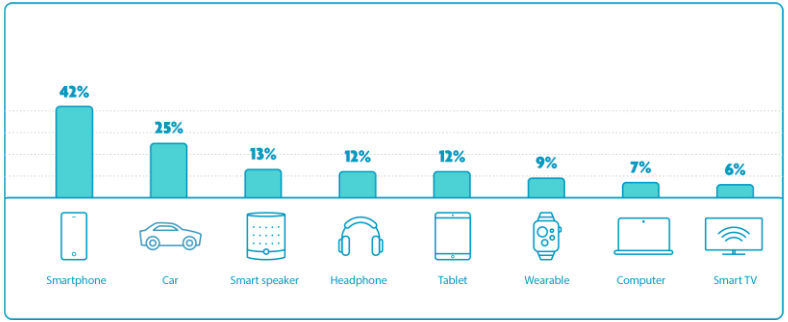




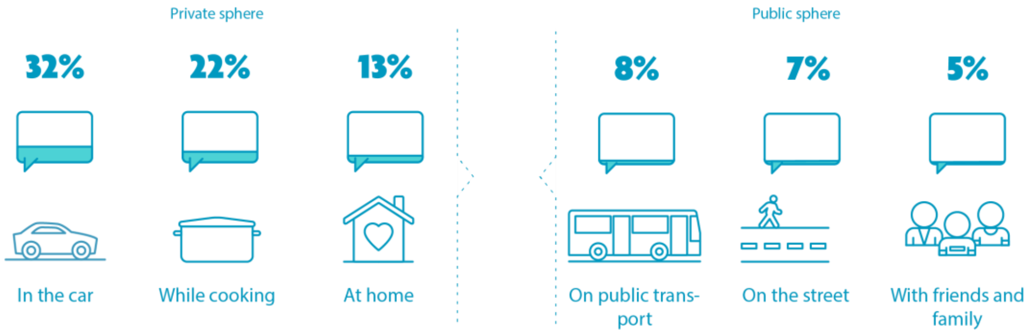
VOICE ASSISTANTS

36% has already used a voice assistant, 9% owns a smart speaker or smart display. But where do we use and what do we do with this technology?

ON WHICH DEVICES DO YOU USE A VOICE ASSISTANT MONTHLY?

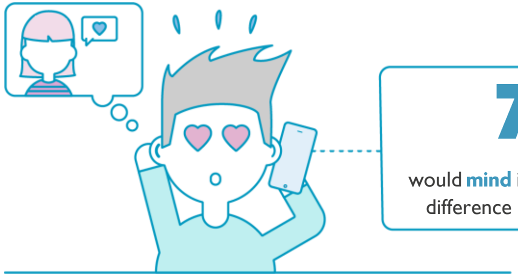


WHERE DO YOU WANT TO USE A VOICE ASSISTANT?



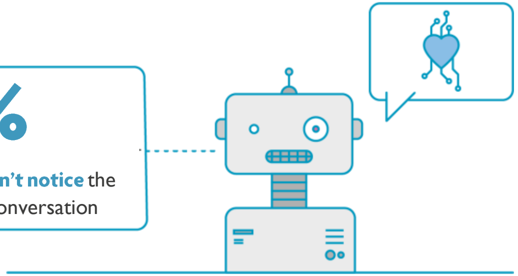
VOICE ASSISTANTS

Just like in the automation cases, the length in which we use and develop voice assistants should be adapted to the citizens



75%

would **mind** if they **didn't notice** the difference during a conversation



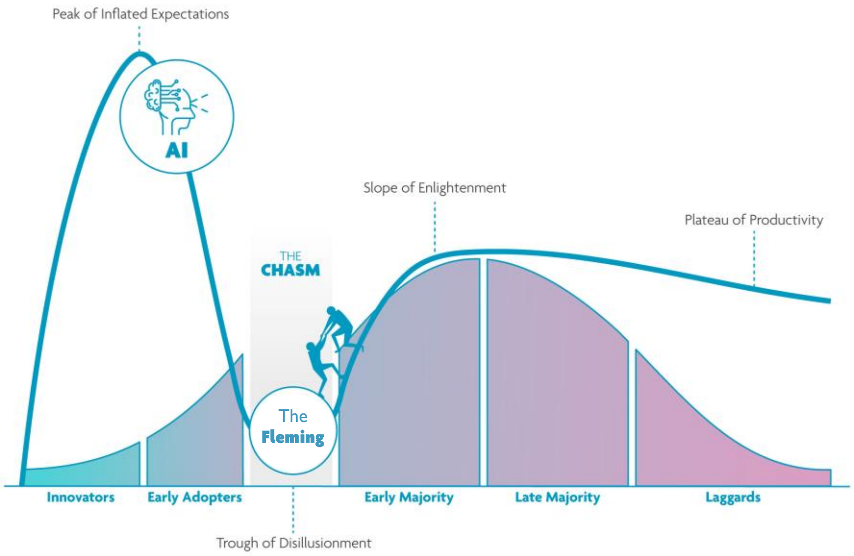
18%

would **have a voice assistant make phone calls** in their name (e.g. for making a hairdresser's appointment)

CROSSING THE CHASM

Flanders is ready to see new innovations. The Diffusion of Innovations theory* states that Flanders has a big enough group of people (passionate lovers, 18%) to adopt new technology and convince the doubting mass to do so as well.

However, we must be careful. This flow is not an automatic flow. There is a risk of 'falling into the chasm'. Therefore innovations must be introduced in a good way, that isn't 'to fancy' and does not scare people away from its opportunities.
To achieve this, and to enter the next digital waves as an inclusive society, it is important that both market, policy and citizens find the same pace to cross the chasm.



*Diffusion of Innovation (Everett M. Rogers, 2003)

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