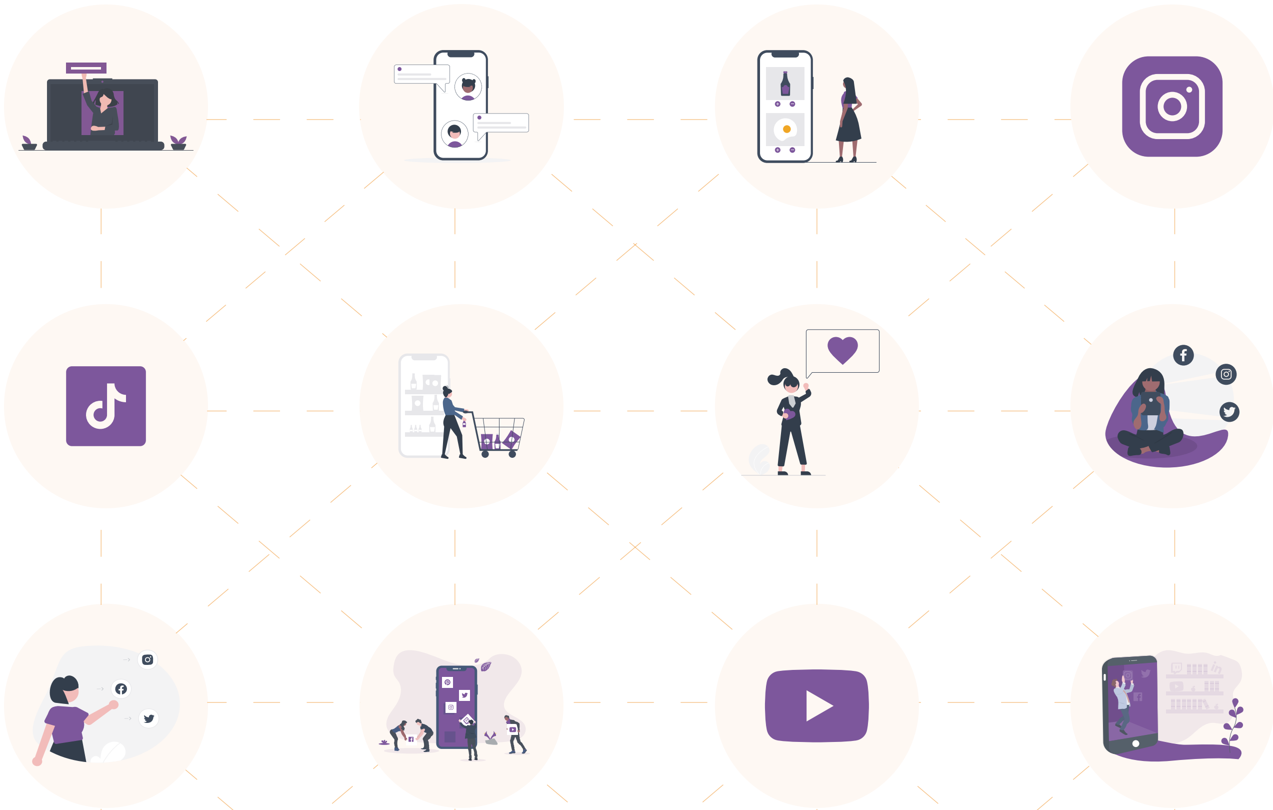
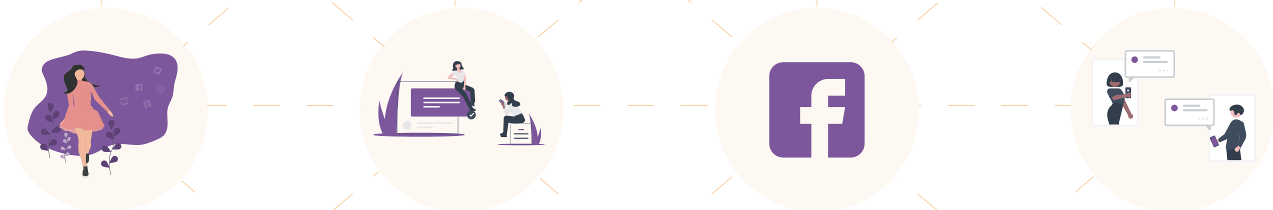


SMI Barometer

How do Belgian youngsters experience branding and influencer marketing via social media?



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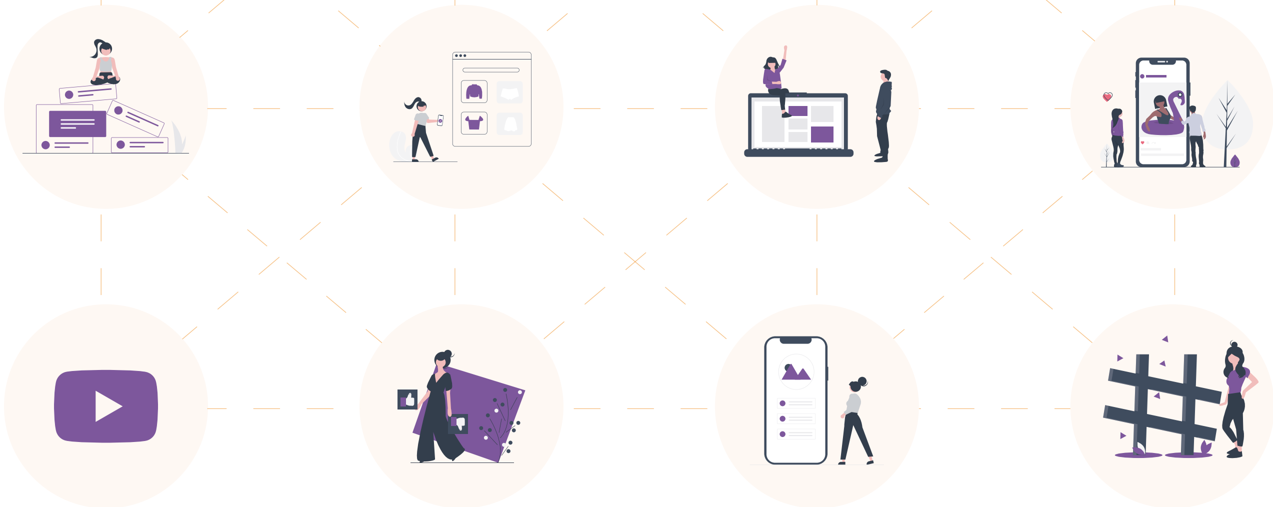

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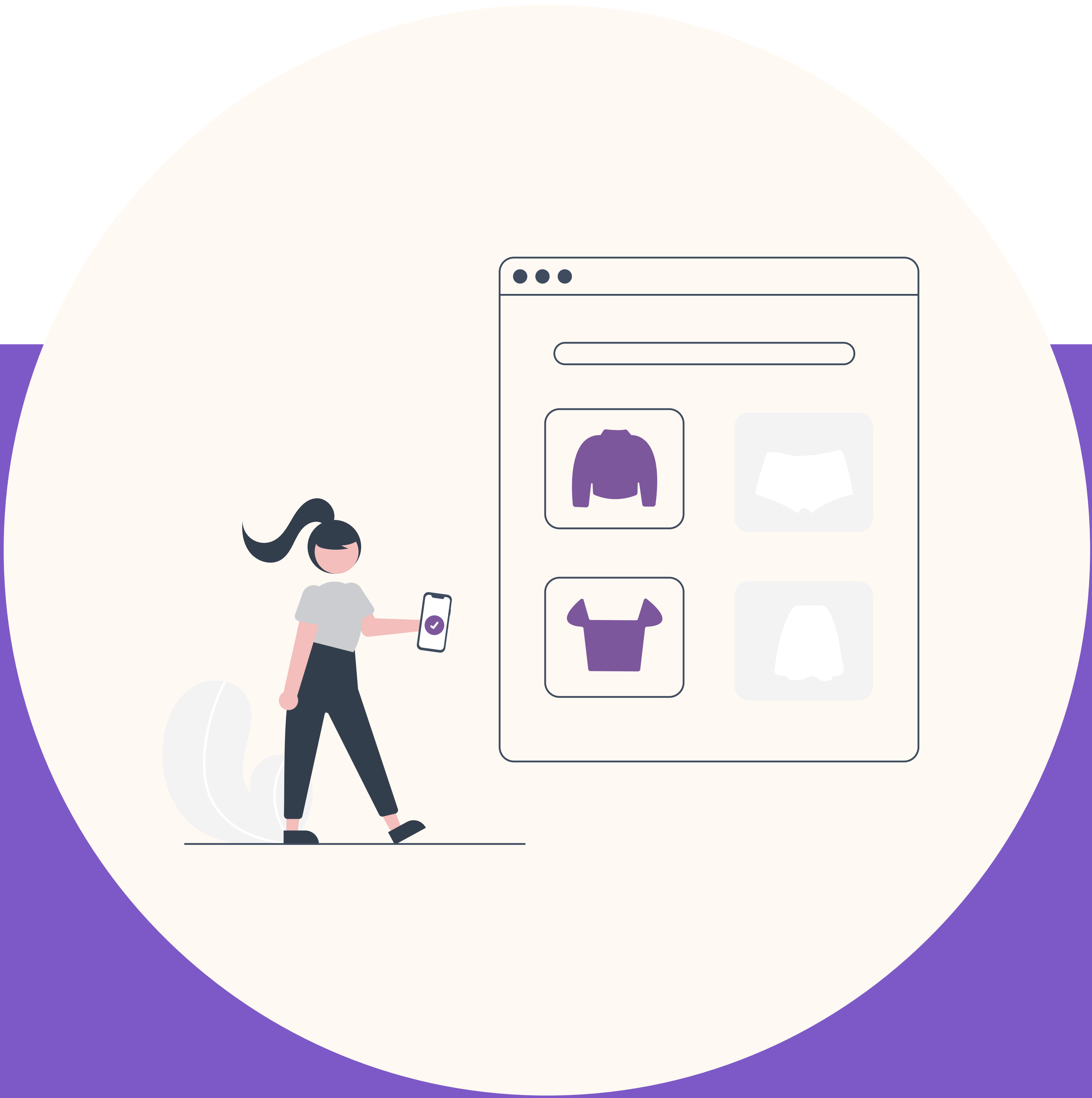


PREFACE

Dear reader,

We are excited to present this second edition of the Social Media & Influencer marketing Barometer. We will consistently use the abbreviation ‘SMI-barometer’ to optimize the readability of this report.

Goal of this research

Last year, we proudly launched the first edition of the SMI-barometer (Social Media & Influencer marketing barometer) which was the outcome of four years of research in the field of social media, influencer marketing and young people. The reaction to the launch of this first edition was overwhelming. Hence, we decided to annually monitor trends in the adoption, use and evaluation of social media and influencer marketing in Flanders and, from this edition, in Belgium. As such, this research is intended to serve as a reference for brands by offering the most up-to-date information on the impact of social media and influencer marketing on Belgian young people between the ages of 16 and 24 years.

Today, we are even more proud to launch the second edition of the SMI-barometer. We hope that this second edition will inspire and motivate you to use social media and influencer marketing in the most effective manner for your (retail)brand in Belgium.

Big changes: insights for Belgium (and not just Flanders)

The insights in last year’s report only applied to Flanders. This second edition provides you with insights for the entirety of Belgium, thanks to the support of Comeos, which represents Belgian commerce & services. Comeos not only funded this research, but was also a reliable partner as they eagerly shared their views and knowledge of the Belgian retail sector. Kristof, Wim and the whole Comeos team: thanks for the great collaboration and support!

Deeper insights into evolutions and trends

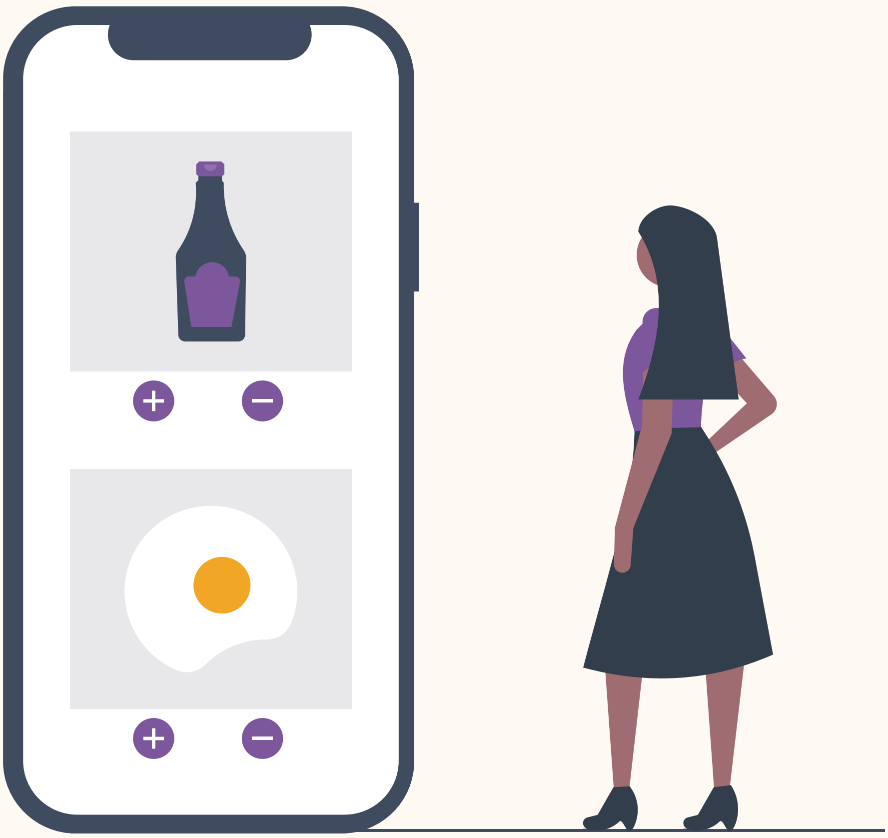
After four years of research in the field of social media, influencer marketing and young people, we are in a position to delve even deeper into the evolutions and trends within this field. Conducting this research on an annual basis and expanding its scope to the whole of Belgium brings various advantages. As such, we can compare this year’s findings with last year’s results. Moreover, we can explore the differences between the Dutch- and French-speaking parts of Belgium.

We hope that you enjoy reading this report as much as we enjoyed writing it. In the meantime, we are already looking ahead to the third edition of the SMI-barometer in 2022 and the dynamics of young people, social media and branding. One important insight from our latest research that cannot be ignored is that the ecosystem of social media and influencer marketing evolves at a dizzying speed. The SMI-barometer aims to be your guide during this dizzying trip.

We wish you a pleasant ride discovering this report!

Jeroen Naudts, Ilse Bruwiere, Marijke De Veirman and Eveline Mollaert

May 2021



CONTENTS

EXECUTIVE SUMMARY: 8 KEY-INSIGHTS

Looking for a hands-on overview of the most important insights of this report? Next you will find an overview of the 8 key-insights of the complete SMI-barometer 2021.

This summary provides the main insights that will enable you as a (retail) brand to become even more effective in reaching and convincing Belgian young people between the ages of 16 and 24 years via social media and influencer marketing.

Good luck!

1 Instagram reinforces No. 1 position, biggest growth for TikTok

2020 brought the first formal confirmation of Instagram as the most popular social medium amongst Flemish young people. In 2021, Instagram further cemented its clear number one position. Even more striking is the strong growth of TikTok. From 8.8% daily use in 2020 to 46.9 % daily use in 2021.

During our interviews we also noticed that almost every company was considering adding TikTok to their channel mix to get in touch with young people. From the point of view of retailers, TikTok is a real challenger to Instagram and to a lesser extent Facebook.

2 French-speaking young people are even more focused on video apps.

When we compared social media use between Dutch- and French-speaking young people, we noticed that French-speaking youngsters are even more focused on video apps, such as YouTube, TikTok, Snapchat and Twitch.

3 Start with engagement, brand loyalty will follow

When we asked Belgian young people about how they preferred to be approached by retail brands on social media, the picture is really clear. Instagram remains the most popular, in particular branded posts, stories and sponsored content from influencers they follow. Youtube, Facebook and Tik Tok (in order of importance) are still relevant channels for young people to get in touch with brands.

Remarkably, young people are more open to organic branded content, such as posts and stories from brands and influencers they follow, while paid ad content is less appreciated.

4 Instagram, Facebook and YouTube often have the widest reach. Some opportunities for Pinterest, while other social media seems saturated.

When we look at the social media platform with the widest reach, the same three social media always pop up: Instagram, Facebook and YouTube.

For some sectors (Fashion, Interior and Do It Yourself (DIY), there is potential for Pinterest. Other social media seem to have reached a point of saturation, hence offering no further opportunities to reach young people.

Retail sector	Social media channel(s) with the widest reach	Opportunities
Fashion	Instagram, Facebook, YouTube	Pinterest Instagram (South) and TikTok (South)
Health	Instagram, YouTube and Facebook	
Beauty	Instagram, YouTube and Facebook	
Electronics	YouTube, Instagram and Facebook	
Interior	Instagram and YouTube	Pinterest (North)
DIY (Do It Yourself)	YouTube, Instagram and Facebook	Pinterest
Garden and animal	Instagram, Facebook and YouTube	
Food and beverage	Instagram, Facebook and YouTube	Twitch

5 The impact of influencer marketing is still growing.

Influencer marketing is not a passing fad. In 2020, the impact of influencer marketing was already confirmed. In 2021, influencer marketing further established itself as a fully-fledged marketing strategy to reach young people and we even note a growing impact. 26.2% of the young people polled stated having bought something that an influencer had promoted in the past three months. In 2020, this figure was approaching 20%.

More young people are following influencers compared to last year. It is possible that the Covid crisis has affected the evolution of this number. Still, it is clear that influencer marketing has a big impact on the attitudes and behaviours of young people.

6 Influencer marketing is even bigger in the French-speaking part of Belgium

In the **French-speaking part of Belgium**, influencer marketing is even bigger. French-speaking young people not only follow more influencers, their impact on young people' buying behaviour is also more significant: 30% (!) of French-speaking young people have bought at least one product in the last three months. In the Dutch-speaking part this figure is 22.5%.

7 Instagram, TikTok and YouTube are most popular for getting in touch with influencers

Instagram is obviously the place that can be called 'home' for influencers. Almost 3 out of 4 Belgian young people get in touch with influencers via this social medium. However, compared to 2020 things are changing really fast as illustrated by the huge increase in reach achieved by remarkable runner-up TikTok, for instance.

At this speed, TikTok will be the most popular social medium for getting in touch with influencers in 2022.

8 The power of influencers? Fun, fun, fun and original content

Belgian young people want to have fun, fun, fun and discover original content while following influencers. There is no doubt that original content is the main reason why Belgian young people follow influencers. Compared to the findings of 2020, this factor has remained absolutely stable.

There are no big differences between Dutch-speaking and French-speaking young people concerning their reasons for following influencers. However, French speaking young people consider the influencers' credibility to be even more important compared to Dutch-speaking young people.

RESEARCH QUESTION: CONTEXT & TERMINOLOGY

What can you expect from this second edition of the Social Media & Influencer marketing Barometer, also known as the SMI-barometer? In this research report, we have focused on the research question: 'How can Belgian (retail)brands increase their impact on Belgian young people between the ages of 16 and 24 via social media and influencer marketing?'

First innovation of this SMI-barometer: from Flanders to Belgium

Last year's SMI-barometer focused only on Flanders. With the support of Comeos, we were able to extend the geographical scope of our research to the entirety of Belgium. In this way, we are now able to compare findings between regions, i.e. between Dutch-speaking and French-speaking young people. Moreover, to our knowledge, this report is the first to provide in-depth insights on the impact of social media and influencer marketing among French-speaking youth.

Second innovation of this SMI-barometer: comparisons of trends for Flanders

In 2020, the first edition of the SMI-barometer focused on Flanders. By repeating our research in 2021, we were able to map the evolution of social media and influencer marketing in Flanders and monitor their impact on Flemish young people.

Definition of the concept of 'impact'

In this report 'impact' is conceptualized as (1) **increasing** the **reach** of the brand and (2) optimizing **brand experience** amongst the target group of Belgian young people between the ages of 16 and 24.

Definition of the concept of 'social media'

The selection of the 'social media' included in this research is based on their use among young people in Flanders (Digimeter, 2020). Compared to 2020, in 2021 we extended the list of social media from 9 to 11 social media channels, by adding Whatsapp and Discord. The following social media were included in our research (in alphabetical order):

1. Discord*
2. Facebook
3. Instagram
4. LinkedIn
5. Pinterest
6. Snapchat
7. TikTok
8. Twitch
9. Twitter
10. Whatsapp*
11. YouTube

* = new compared to SMI-barometer 2020

Definition of 'influencer marketing'

'Influencer marketing' was conceptualized in the same way as last year. Lamarque (2017) uses an interesting definition of influencers based on four parameters:

1. a person (that means that we're not talking about an organization or PR team)
2. who spreads contextually-relevant messages (this is possible in a large, but also limited context)
3. which are also meaningful (to their followers),
4. that these messages trigger actions from 'these others' (The impact on behaviour is crucial. It is not solely a matter of communicative power).

Influencers' large network, their content creation skills and their impact on their followers' behaviour (Lamarque, 2017), resulted in brands compensating influencers to endorse their products by creating and spreading brand-related content via their own social media profiles, a practice which has been referred to as influencer marketing (De Veirman, 2020).

METHODOLOGY: THREE STUDIES

The SMI barometer comprises the results and findings of three studies:

1. Online survey among Belgian young people

The findings and results of the Social Media & Influencer marketing barometer are based on an online survey amongst Belgians between the ages of 16 and 24. The data collection took place between November 2020 and January 2021. (The data collection of the SMI-barometer 2019 took place between November 2019 and February 2020).

In Flanders, the distribution of the survey was achieved both through students, who distributed the survey to the target group, and through the University's network. In Brussels and Wallonia, an online panel provider carried out the distribution of the survey to the target group. After data cleaning consisting of removing incomplete and incorrect data, 3,263 valid cases were identified.

2. Qualitative research among Belgian young people

In February- March 2021, we conducted n=33 individual online qualitative interviews with a mix of Dutch-speaking and French-speaking young people. These respondents were recruited via the quantitative sample taking into account age, gender and region (provinces). The young people were interviewed online (via WhatsApp) to gain insights regarding their individual use and experience of social media, brands on social media and influencers. All young people used WhatsApp prior to the qualitative survey.

3. In-depth interviews with Belgian retail brands

During the period October 2020 – March 2021 we also spoke to 9 (digital) marketing managers of retail brands. These interviews were conducted via videocall.

These retail brands were Bel & Bo, ZEB, Foodmaker, Veepee, vente-exclusive.com, Decathlon, Deliveroo, Dreamland, Vandenborre and Krefel.

The insights gained from these interviews will be indicated with this specific lay-out (yellow background).

INTRODUCTORY REMARKS ABOUT THE RESEARCH

Weighting

To assure a representative sample of the Belgian youth population, we weighted the data[1] to make our sample reflect the population, based on census data from Statbel. We weighted the findings on the basis of age group, gender and province.

Comparative Analyses

If meaningful, we considered differences between:

- females (58.7%, n = 1917) and males (40.7%, n = 1328)
- age groups (16-18 years (23.9%, n = 1154), 19-21 years (40,7%, n = 1328) and 22-24 years (35.4%, n = 781))
- Dutch-speaking (n = 1789; 55.1%) and French-speaking (n = 1465; 44.9%) young people.
- Non-parametric tests were used to compare groups. In cases involving two groups, the Mann-Whitney U test was used, in cases involving more than two groups, the Kruskal-Wallis test was used.
- Where differences between groups are reported, differences are at least significant at the .05 level.

Evolution 2019 – 2020 for Flanders

Moreover, we consider the evolution in Flanders between 2019 (n = 1167) and 2020 (n = 1798) where meaningful.

Differences between percentages (for example when comparing this year's results with last year's) are expressed in percent points, which is the absolute difference between the two percentages.

For example, supposing that the usage frequency of a social media platform increases from 20% to 30%, then that is an increase of 10 percent points. The same difference expressed as a relative percentage means an increase of 50% (to go from 20% to 30%, an increase of half the starting value is needed).

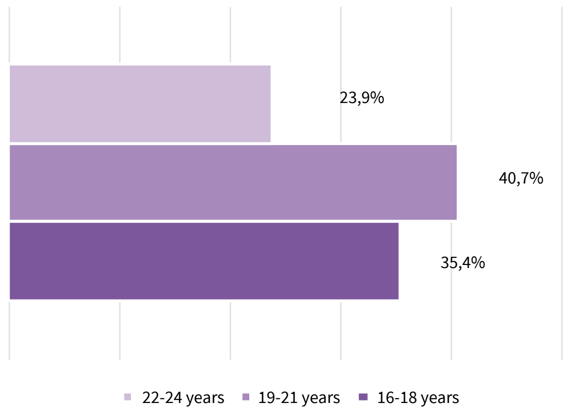
1 *Based on the scientific manual for data weighing for GGD epidemiologists (GGD Nederland, 2009) and the guidelines set out by Johnson (2008).*

ONLINE SURVEY: SAMPLE 2020

Age

The target group of this survey is young people between the ages of 16 and 24. The mean age of the n = 3263 Belgian young people was 19.65 years (SD = 2.37) with min. 16 years and max. 24 years. As previous research shows that social media use may significantly differ across age groups, we considered differences between age groups for certain analyses. For this purpose, we created 3 age categories: 16-18 years (n = 1154), 19-21 years (n = 1328) and 22-24 years (n = 781). Figure 1 shows the distribution of participants across these age groups.

Figure 1: Distribution of participants across age groups



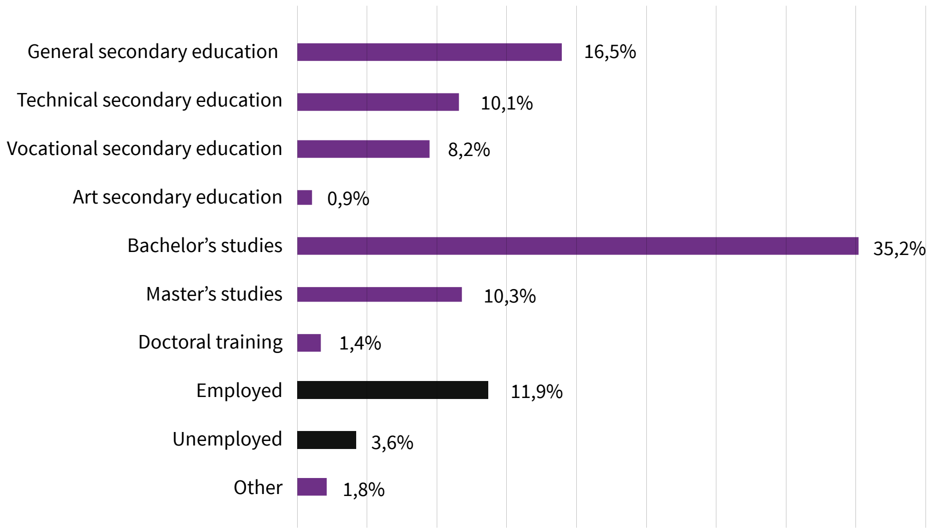
Gender

58.7% females (n = 1917) and 40.7% males (n = 1328) participated in the online survey. 18 participants (0.6%) indicated gender ‘X’.

Education

Figure 2 provides an overview of the studies followed by the participants at the time of survey. When participants marked ‘other’, they mainly indicated adult education, a seventh specialization year after completing secondary education, or advanced Bachelor or Master studies / continuing education. 11.9% of the participants indicated that they already worked, 3.6% of the respondents were unemployed at the time of the survey.

Figure 2: Overview education / employment participants



Geographic distribution

Figures 3 shows the distribution of participants across the regions in Belgium.

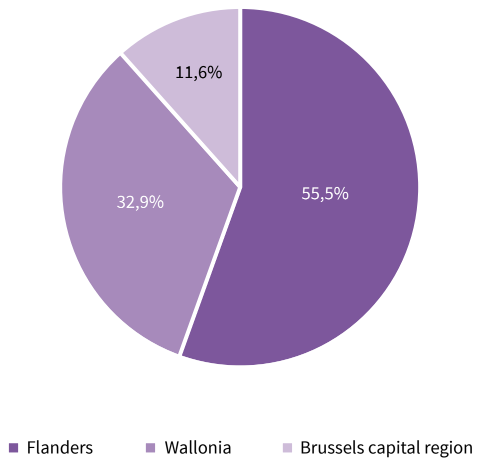
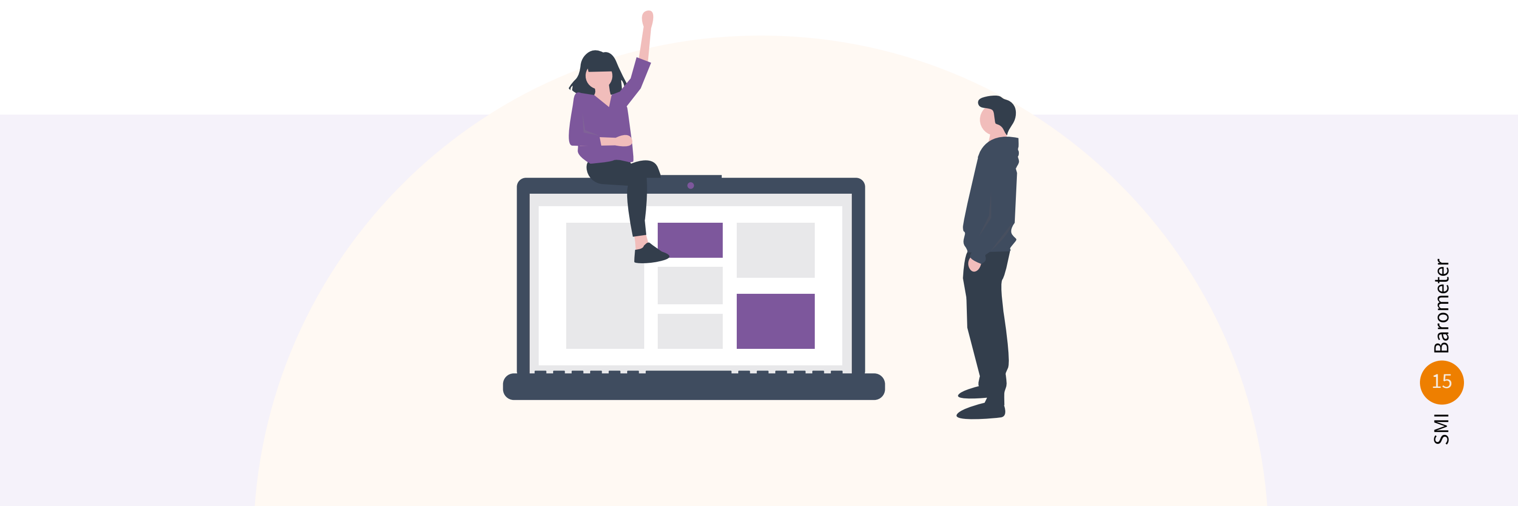


Figure 3: Distribution of participants across regions

55.1% of the sample was Dutch-speaking (n = 1789); and 44.9% French-speaking (n = 1465).



SOCIAL MEDIA USE

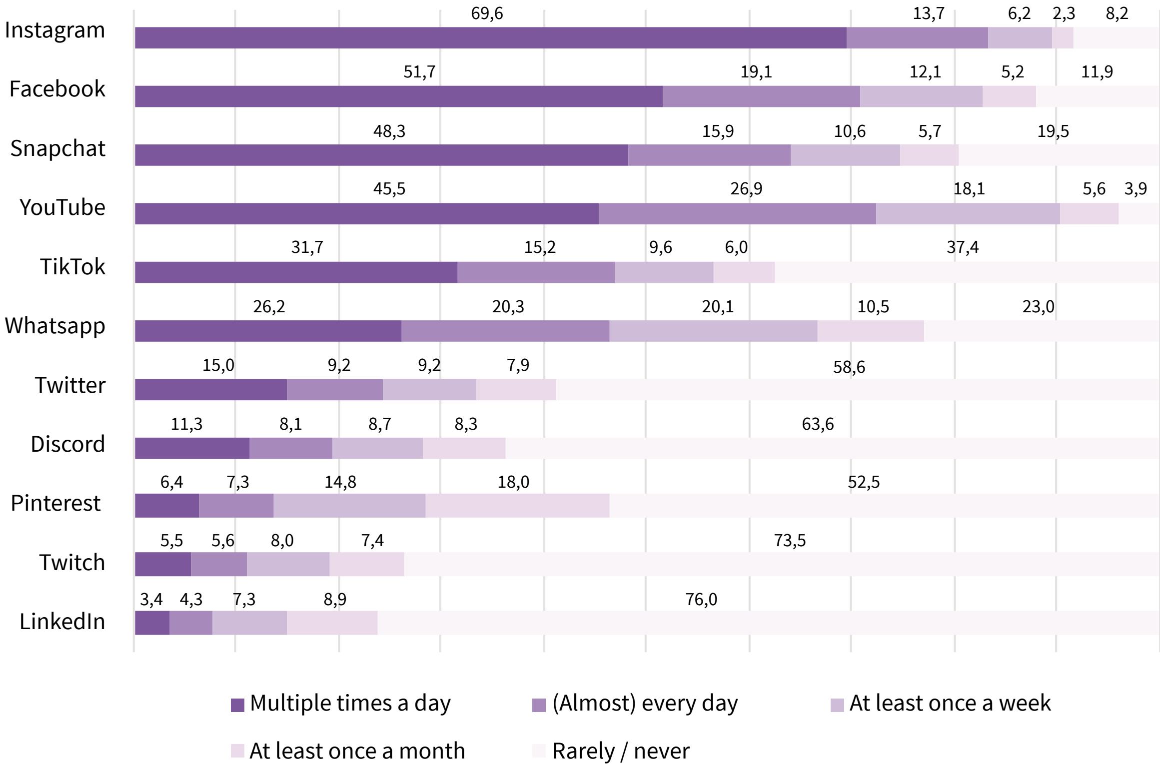
Social media use among Belgian young people

KEY INSIGHTS

- **Instagram is the most popular social media channel**, with almost 7 out of 10 16-24 young people using it several times a day and 83% daily. Next in line are YouTube (used at least daily by 72%), Facebook (used daily by 71%), Snapchat (64% daily use), TikTok (47% daily use) and WhatsApp (47% daily use).
- Facebook remains important, but Facebook Messenger is used slightly more frequently than Facebook.
- There are **important regional differences** in social media use. Facebook, Instagram, LinkedIn and WhatsApp are more popular in the North while TikTok, Snapchat, YouTube, Pinterest and Twitch are more frequently used in the South.
- **Some social media are more popular among female vs. male young people**. There are also some age differences in social media use:
    - » User profile of Twitter, YouTube, LinkedIn, Twitch and Discord is skewed towards men.
    - » Facebook, Instagram, TikTok, Snapchat and Pinterest have a more female user profile.
    - » Use of Snapchat and TikTok is higher among 16-18 years old, while Facebook, LinkedIn and Whatsapp become more popular as age increases.
- **In Flanders**, use of all channels but Facebook increased compared to last year. The **huge rise in TikTok** use is particularly striking. Statistics on the use of Instagram remained unchanged.

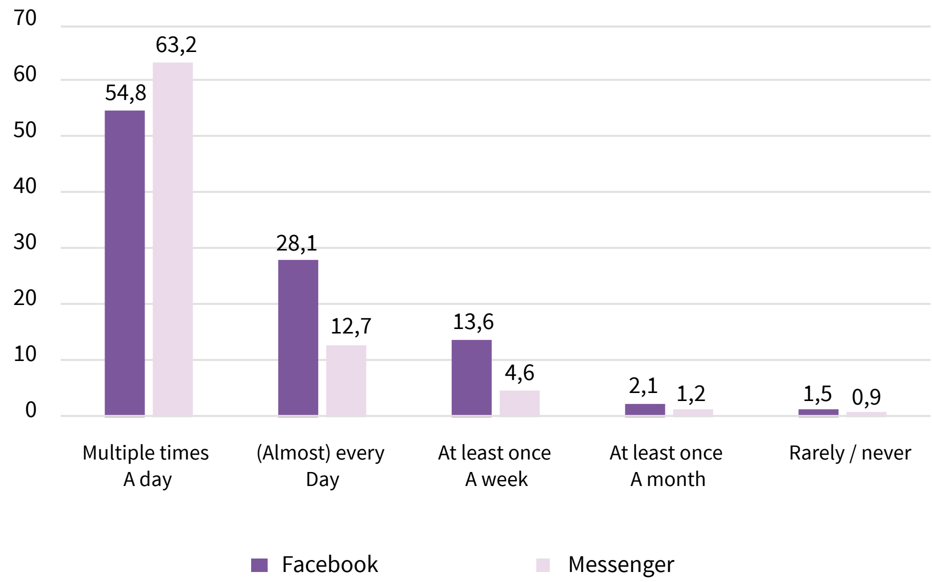
Figure 4 provides an overview of how often Belgian young people use social media in their everyday lives (in %). Other frequently mentioned social media were: Reddit (n = 54), VSCO (n = 24), Telegram (n=22), Swarm (n = 21), Strava (n = 20), Tumblr (n = 18), and Tinder (n = 12).

Figure 4: Social media use among Belgian young people (in %; n = 3263)



Facebook Messenger is used more than Facebook

Figure 5: Use of Facebook vs. Facebook Messenger (in %, n = 3263)



As shown in the graph above, Facebook Messenger is used on a more frequent basis than Facebook itself. Our qualitative research confirms the importance of Facebook Messenger and Groups as a reason to use Facebook:

> "Via FB zit ik in die groepen waarin belangrijke info wordt gedeeld (vb praktische dingen, documenten. Facebook is eerder voor de 'nood' en Messenger voor het plezier." *(woman, 17 years)*
>
> "Je suis sur Facebook presque uniquement parce qu'il est indispensable pour avoir Messenger. Sinon je ne pense pas que je serais sur Facebook." *(woman, 20 years)*
>
> "J'utilise beaucoup plus Facebook (Messenger) pour les travaux de groupes à l'école comme nous sommes tous en distantiel." *(woman, 20 years)*

Based on our interviews with young people, we learned that there is a **risk that the use of Facebook might further decrease**. Other apps better meet their needs or benefit from a younger image.

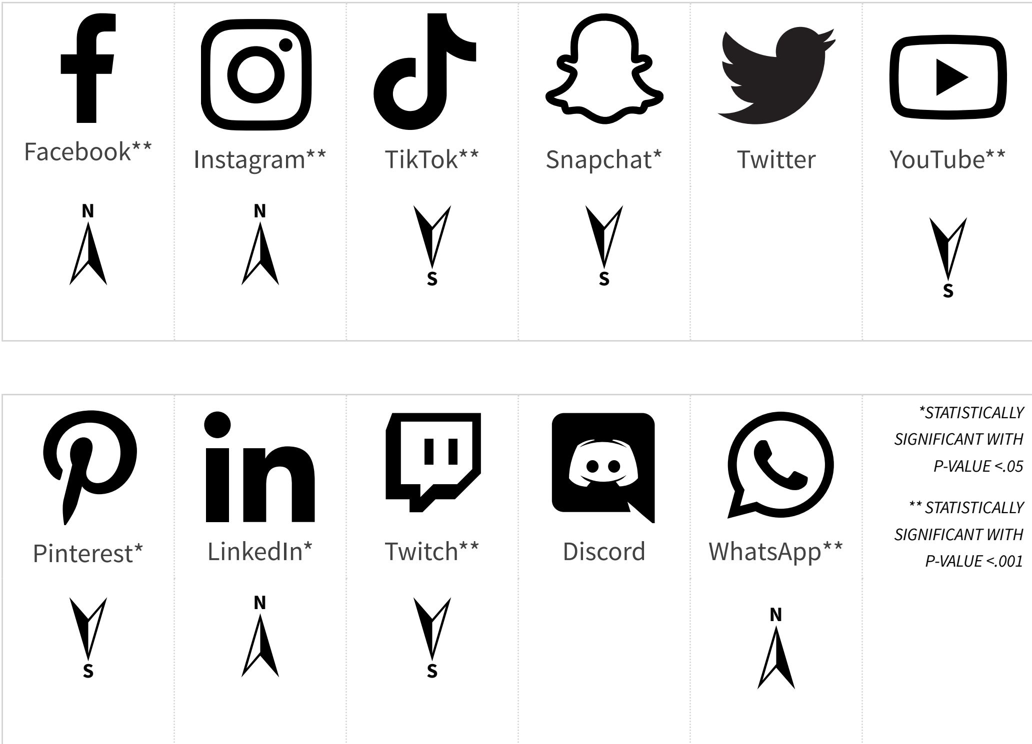
> "Facebook wordt volgens mij minder populair omdat de andere apps stijgen, ook omdat de ander apps specifieker zijn, of dat je op die apps hetzelfde kan als je op Fb kan. Ook wordt het meer en meer gebruikt door de oudere generatie. Daardoor haken volgens mij ook jongeren af." *(woman, 17 years)*
>
> "Et oui je vais bien sur messenger et pas sur Facebook, à l'époque quand j'étais petit j'allais souvent sur Facebook (j'ai grandi avec ce réseau) mais maintenant je ne suis plus du tout dessus. C'est devenu un réseau de "vieux" apparemment." *(man, 19 years)*
>
> "Mais ceux avec qui je suis très proche on se parle quasi partout aussi bien messenger qu'insta que snap. Parce que c'est la seule application qu'ils savent utiliser correctement 😂 (referring to his family)" *(man, 19 years)*

This existing importance of Facebook Messenger and (likely further) decreasing relevance of Facebook might be an opportunity for brands to reach young people through branded content via Facebook Messenger.

Big regional differences in social media use

When comparing social media usage between Dutch-speaking and French-speaking young people, we find significant differences in usage. The table below provides a clear overview:

Figure 6: Social media use among Belgian youth: comparison North (N) – South (S)



Our conversations with French-speaking respondents revealed a striking importance of YouTubers and YouTube vloggers.

> “Alors, il y a énormément de youtubeurs que je suis, donc je ne sais pas si c’est utile que je les cite tous, mais généralement, je les suis aussi sur TikTok et Instagram si je les aime beaucoup, mais pas tous. Je suis généralement des « youtubeurs », car je les trouve vrai sur les réseaux sociaux.” *(woman, 20 years)*
>
> “Ils sont cool, détendus, freestyle, pas surfaits (sauf un peu Sananas que je ne suis que pour le make-up). Les sujets de vidéos sont différents des classiques 🙂. YouTube on les voit en « vrai » et parfois ce sont des réactions instantanées tandis que derrière les photos, on ne sait pas ce qu’il se cache et ça peut être retouché 🙂” *(woman, 24 years)*

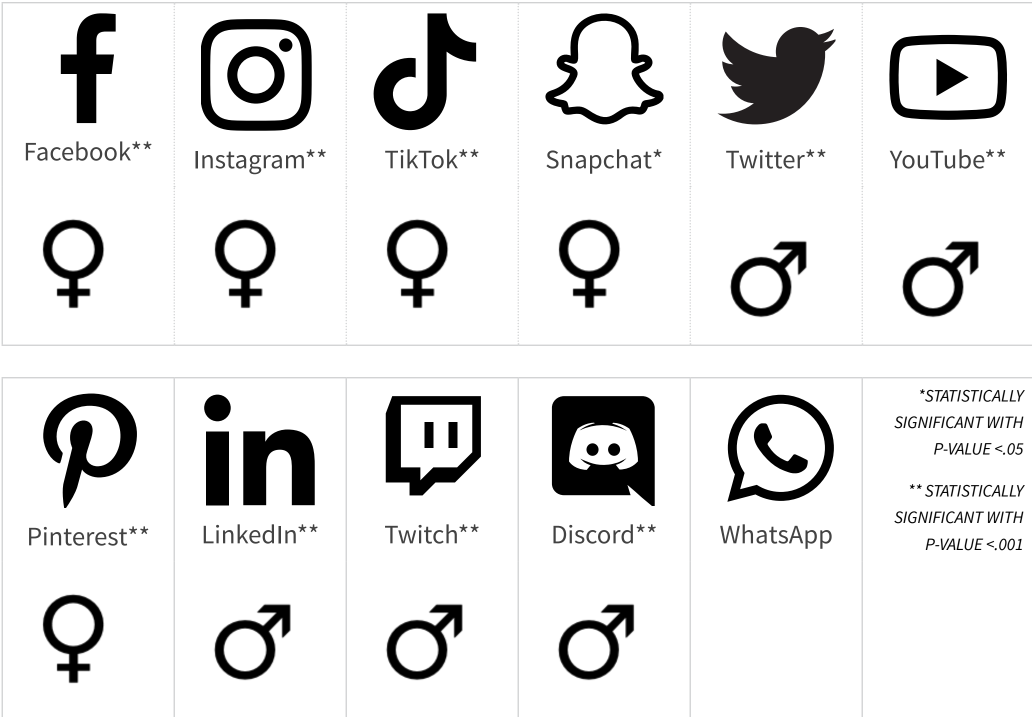
These differences have **important implications for brand communication**. To target young people in the 16-24 age bracket, a regional social media approach is recommended.

Social media use differs among men and women

When comparing social media usage between males and females, we find significant differences in usage across all social media, except WhatsApp. This different user profile obviously also has implications for brands targeting a more female or male target group as

- YouTube, Discord, Twitter, Twitch and LinkedIn are more frequently used by males
- Instagram, Facebook, Snapchat, TikTok and Pinterest are more frequently used by female young people

Figure 7: Social media use among Belgian youth: comparison females (n = 1917) and males (n = 1328) (in %)



For some social media, usage differs according to age

Facebook, LinkedIn and WhatsApp tend to be most popular among older age groups, while TikTok and Snapchat tend to be more popular among younger age groups.

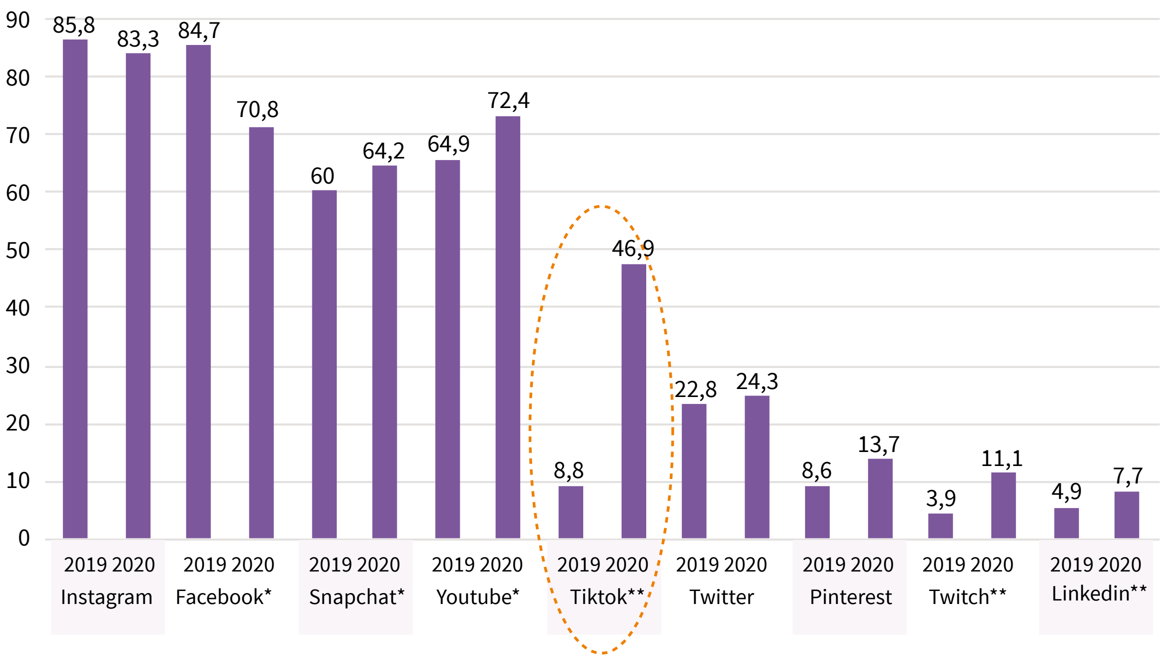
Figure 8: Social media use among Belgian young people: comparison age groups.

Facebook**	Instagram**	TikTok**	Snapchat**	Twitter**	YouTube
22-24 y/o most 16-18 y/o least	19-21 y/o most 22-24 y/o least	16-18 y/o most 22-24 y/o least	16-18 y/o most 22-24 y/o least	19-21 y/o most 22-24 y/o least	
Pinterest	LinkedIn**	Twitch	Discord	WhatsApp**	*STATISTICALLY SIGNIFICANT WITH P-VALUE <.05 ** STATISTICALLY SIGNIFICANT WITH P-VALUE <.001
	22-24 y/o most 16-18 y/o least			22-24 y/o most 16-18 y/o least	

Higher social media use among Dutch-speaking young people

An analysis of the 2019 vs. 2020 data for Flanders indicates that the **use of almost all social media but Facebook increased** (Facebook: decrease of 9.1%).

Figure 9: Evolution of (almost) daily or more social media use among Flemish young people (in %; n2019 = 1167; n2020 = 1798)



Instagram, Facebook, YouTube and Snapchat remain the most important channels (used by at least 60% on a daily basis). The huge increase of TikTok (+34%) is striking. Our qualitative survey learned that its **entertainment value** is the key driver for usage among young people.

> "Als ik mij verveel kijk ik filmpjes op TikTok, ik post er ook heel af en toe wat maar vind het leuker om er te bekijken." *(woman, 19 years)*

According to young people, the **Covid19 crisis** is the main reason for the increase in their social media use. Our survey next year needs to confirm whether or not this will have led to a permanent behavioural change.

> "Omdat ik nu veel meer tijd heb met corona en tiktok is een soort tijds verdrijf voor mij) Ik gebruik dit vaak en heel veel eigenlijk in de les als we dan studie hebben, in de middagspauze, na school, smorgens 😂 maar zelf deel ik geen video's op tiktok, ik deel wel veel tiktok's die ik zie voorbijkomen met vrienden, ik gebruik TikTok voornamelijk omdat ik dit wel leuk entertainment vind dat er goede en leuke video's op te vinden zijn, meer iets voor tijdverdrijf." *(woman, 20 years)*

Nonetheless, for brands it confirms the need for an **integrated social media communication strategy**.

Along with the success of TikTok among young people, **Belgian retail brands also have an increased interest in TikTok.**

Hence, Belgian retail brands are strongly considering TikTok for their channel mix to get in touch with Belgian young people. For example, Vandenborre is considering TikTok:

> "We zijn aan het bekijken hoe we TikTok kunnen inzetten. Maar je moet dit als merk goed aanpakken. Ik ben ervan overtuigd dat als je als (retail)merk Tiktok niet goed aanpakt, je daar imagoschade mee kan oplopen. (...) Het is zeker niet uitgesloten dat we TikTok zullen inzetten, maar dan zal het moeten zijn binnen een zeer duidelijke guideline waarin we echt een goed creative format kunnen neerzetten dat ook heel goed matcht met het platform TikTok." *(Elke De Vuyst, marketing- en communicatiemanager Vandenborre)*

The first experiments with branded content on TikTok show that there is one key-insight: 'keep it short and simple'. For example, the experience of Decathlon shows the importance of a short and simple message:

> "Ik heb gemerkt dat de meest eenvoudige video's op TikTok het beste werken. Bijvoorbeeld onze eerste video die viraal ging was een video waarbij we een nummer gebruiken dat op dat ogenblik heel populair was. Ik had me uitgedost in een Decathlon out-fit en op de beats van het liedje veranderde ik naar een typische hockey outfit. Een tweede video die bij ons viraal ging, was van dansende collega's in de Decathlon winkel. Opnieuw erg herkenbaar, iedereen had zijn mondmasker aan. Maar hoe eenvoudiger het idee, hoe beter het werkt." *(Wing Tji Liu, social media expert Decathlon)*

Also, other retail brands confirm that the quality of the content is of great importance on social media:

> “We moeten echt werken met verschillende soorten beelden op Instagram en onze volgers blijven verrassen. Als we dat niet doen, zien we snel in onze statistieken dat we volgers verliezen. Content moet echt top zijn. Influencermarketing helpt ons ook om continu goede content te blijven creëren. De content op onze sociale media moet nauw aansluiten bij de verwachtingen en leefwereld van onze klant.” *(Anneleen Vantomme, content marketeer Bel & Bo)*

Apart from the quality of content, video seems to still be ‘king’ of the different formats of content:

> “Uit onze eigen onderzoeken zien we dat video voor veel engagement en ‘stopping power’ zorgt. Video is voor ons zeker belangrijk, maar het hoeft niet altijd video te zijn voor ons. Bijvoorbeeld User Generated Content is iets wat wij ook inzetten. Dat kan dan foto én video zijn. User Generated Content geeft bijvoorbeeld veel inspiratie over hoe een bepaald product gebruikt kan worden. “ *(Eef Goossens, social media manager Dreamland)*

SOCIAL MEDIA & BRANDS THROUGH THE EYES OF BELGIAN YOUNG PEOPLE

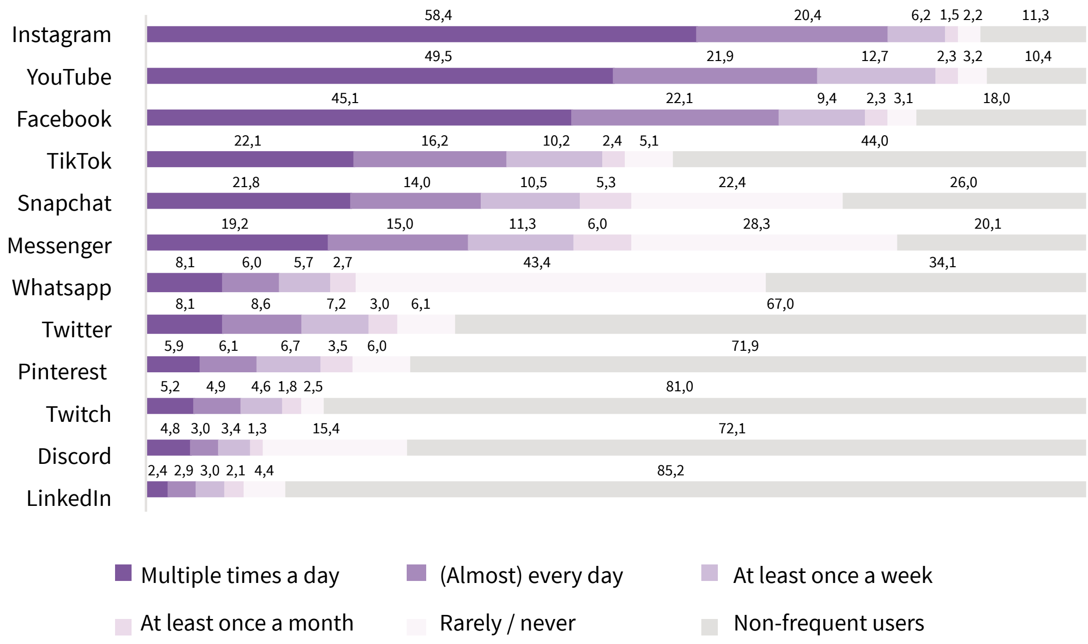
KEY INSIGHTS

- **Instagram, YouTube** and **Facebook** are the most important channels for brand-related content, followed at a distance by TikTok, Snapchat and Facebook Messenger.
- Exposure to branded content **differs according to the region**. Instagram is more important for Dutch-speaking young people. YouTube, Facebook Messenger, Snapchat, TikTok, WhatsApp, Twitter, Discord, Pinterest and LinkedIn are more important for French-speaking young people.
- In Flanders, Instagram, Facebook and YouTube remain the channels on which users experience the greatest exposure to brand-related content. Compared to last year, TikTok and LinkedIn users stated that they came into contact with greater amounts of branded communication.
- Branded content is more appreciated when young people choose to engage with the brand or influencer themselves.
- Instagram is the natural habitat for branded content. The appetite for brand-related content on TikTok is still low.

Figure 10 provides an overview of how often Belgian young people encounter brand-related content on social media. Only frequent users of the respective social medium (= participants who use the medium at least 1x per week or more) were taken into consideration. Figure 10 also includes infrequent users to ensure that an accurate picture is given of the advertising potential of the various social media platforms (n = 3263).

The figure shows that young people often encounter brands on social media. The most important channels are Instagram, YouTube and Facebook. Despite its decreasing usage, Facebook remains important for brand-related content.

Figure 10: Overview of brand touchpoints on various social media platforms (in %; n = 3263)



In our qualitative survey, young people evaluated advertising on social media as being an annoyance. **Advertising via Facebook Messenger, sponsored posts in the feed, Pinterest and TikTok tend to generate more neutral reactions** mostly because they are considered as less intrusive and/or can be more easily ignored.

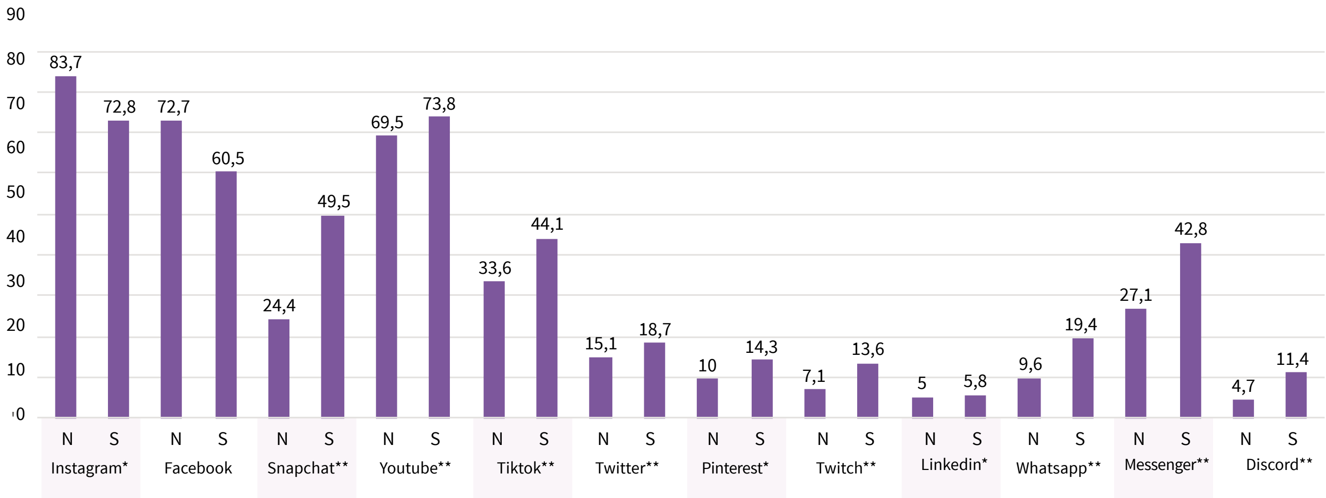
> “Regarding Instagram: Ik heb de indruk dat ik iets bewuster kijk naar de reclames tussen mijn stories, de reclames in mijn feed ontgaan me sneller denk ik.” *(man, 20 years)*
>
> “Op Messenger heb ik nog geen reclames gehad, denk ik. Maar Ik vind op snapchat en messenger dat er heel weinig reclame is. En ja dat vind ik dus heel leuk.” *(man, 16 years)*
>
> “Bij YouTube en Facebook filmpjes vind ik het super storend dat er midden in je video reclame aanwezig is. Ik krijg de neiging om dan snel door te scrollen. …je bent gewoon aan het kijken en dan midden in je filmpje reclame ... die wanneer ze minder dan 15s ec duurt je niet kan doorspoelen. Vanaf 15sec en meer kan je na 5sec doorspoelen ...” *(woman, 22 years)*
>
> “Oui beaucoup. Ça dépend des moments, quand je m’installe bien dans mon lit le soir pour regarder des vidéos et que ça commence par deux pubs qu’on ne peut pas skipper ça m’énerve un peu 😂. Plus sur YouTube. Sur les réseaux comme Facebook ou Pinterest, ce n’est pas tellement gênant car il suffit de passer son chemin. Tandis que sur YouTube on a pas le choix 😅.” *(woman, 20 years)*

> “Oui, je vois parfois des pubs sur mon feed, quand j’ai consulté tous les posts de mes abonnements. Je les vois principalement sur Instagram et YouTube. J’en vois rarement sur Pinterest.” *(woman, 17 years)*

Social media & brands: comparison Dutch- and French speaking young people

When comparing the degree of exposure to brands on social media between Dutch-speaking and French-speaking young people, we find significant differences across all social media, except Facebook and Twitch. French-speaking young people report more frequent exposure to brand-related content on YouTube, Facebook Messenger, Snapchat, TikTok, WhatsApp, Twitter, Discord, Pinterest and LinkedIn while Dutch-speaking young people are more frequently exposed to brand-related content on Instagram.

Figure 11: Comparison of (almost) daily or more exposure to brand-related content on social media among Dutch-speaking and French-speaking young people (in %; nNorth = 1783; nSouth= 1480)



Social media and brands: comparison between males – females

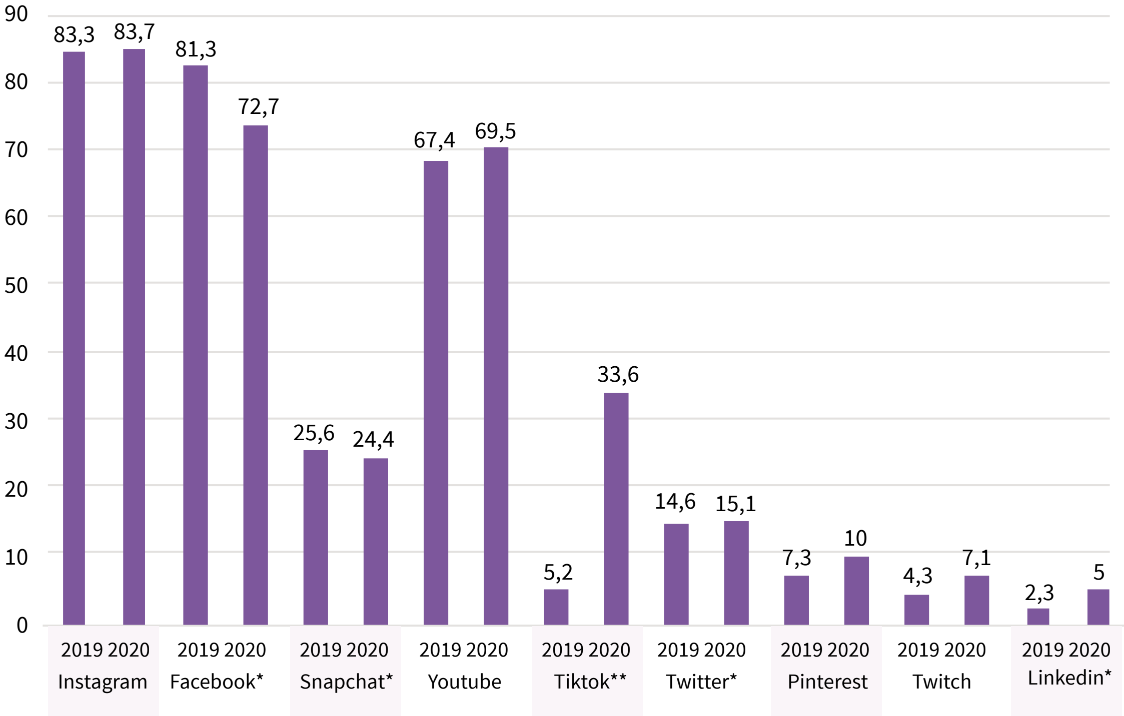
The degree of contact with brands on social media is aligned with gender differences in social media use. Female young people report more frequent exposure to brand-related content on Facebook*, Instagram** and TikTok**, while males report more frequent exposure to brand-related content on Snapchat*, Twitter*, YouTube**, Twitch** and WhatsApp**.

Social media and brands: comparison between age groups

The degree of contact with brands is **also strongly aligned with differences in social media use according to age**. Older age groups (22 – 24 years old) indicate that they are more frequently exposed to brand-related content on Facebook** and Twitter* compared to younger age groups. The latter report more frequent exposure to brand-related content on Snapchat** and YouTube* compared to older age groups. On Instagram*, the middle age group (19 – 21 years old) reports more frequent exposure to brand-related content compared to other age groups.

Evolution of exposure to brand-related content on social media among Flemish young people

Figure 12: Evolution of (almost) daily or more exposure to brand-related content on social media among Flemish young people (in %; n2019 = 1170; n2020 = 1783)



In Flanders: **Instagram, Facebook and YouTube** remain the most important channels where young people recall having seen brand-related content. Nonetheless, we have noticed some important trends:

- For Facebook, there is decrease in (claimed) exposure compared to last year;
- In line with the explosive growth of TikTok usage, brand exposure has also increased a lot on TikTok;
- Exposure to branded content on Snapchat and Pinterest remains rather low.

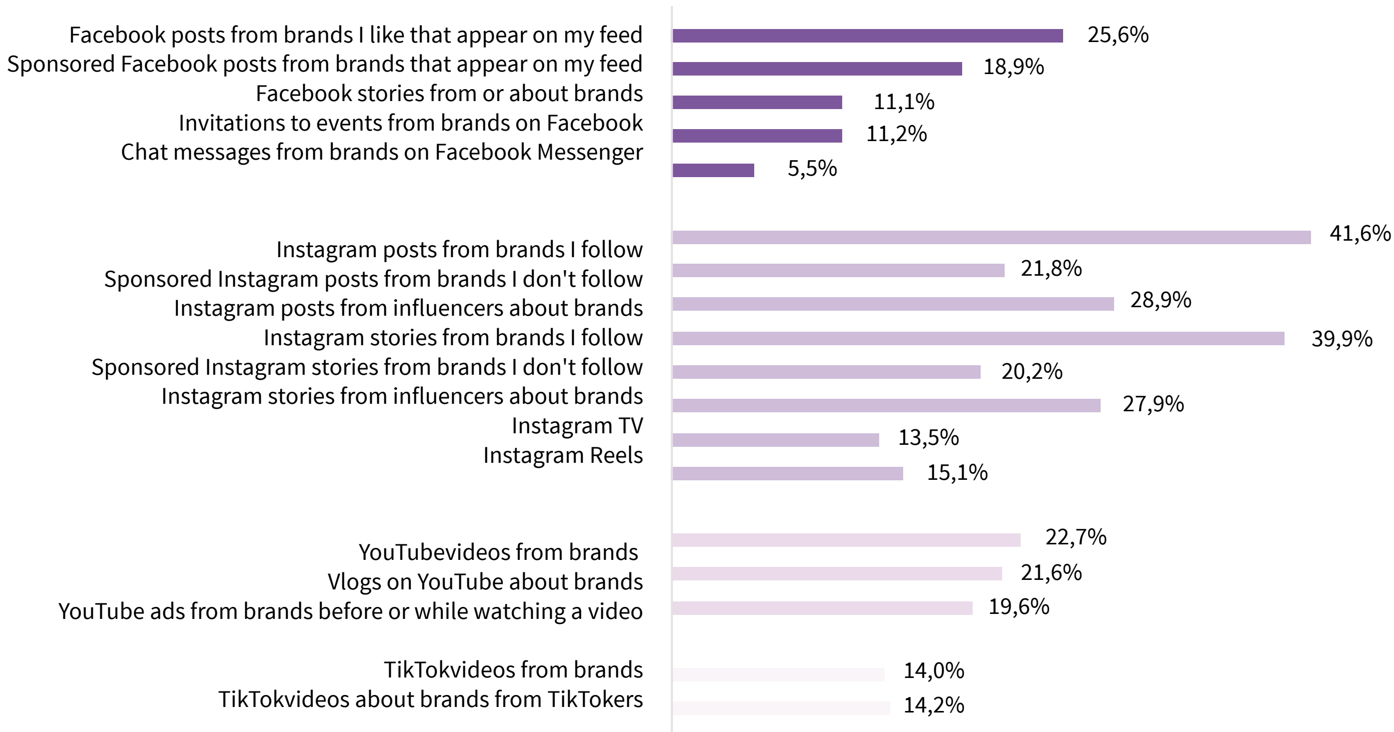
Social media and brands: preferred touchpoints

Next to gauging how often young Belgians are confronted with brand-related content on the different social media platforms, we also asked them how they want to be approached by retail brands on social media. Figure 11 provides an overview of the features that young Belgians prefer when it comes to brand-related content. The percentages are based on frequent users, namely those who use the social media channel at least 1 time a week or more (Facebook n = 2704, Instagram n = 2920, YouTube n = 2951, TikTok n = 1845). Participants could select multiple options. 12.5% does not find any of the proposed features appropriate for brand-related content.

The analysis shows that:

- Irrespective of social media channels, young people prefer content from brands they engage with themselves. More specifically, they prefer organic branded content, either from brands or influencers they started following themselves, rather than paid ads that appear in their feeds.
- **Interest is higher in brand-related content on Instagram**, both in posts and stories. In other words: Instagram is the more natural habitat for brand communication.
- On Facebook, sponsored posts are preferred over Facebook stories, which are experienced as more of an annoyance.
- Appetite for branded content **on TikTok is currently still low**.

Figure 13: Overview of the social media features young Belgian social media users prefer for brand-related content (in %)



INFLUENCER MARKETING

KEY INSIGHTS

- Influencer marketing remains an effective tool for brand communication and is still growing:
    - **85%** of the Belgian young people **follow influencers** on social media. In Flanders, this number increased by almost 5% compared to last year.
    - Influencer marketing **pays off for brands**. In the past 3 months, almost 56% of the young people who follow influencers looked for additional information about a brand that was promoted by an influencer. About one out of 3 started following a brand and **26% even purchased something**. Impact (purchase in the past 3 months or following brand) is **bigger among French-speaking young people**.
    - **Females** are more inclined to follow influencers than males and also follow more influencers. **Older** young people are **less inclined to follow influencers** compared to their younger counterparts and also follow fewer influencers.
    - Young people are **fully aware** of the commercial intentions of influencers. **74 %** of the Belgian young people believe it is good idea for brands to **use influencers for commercial purposes**.
- **The most important influencer channels are Instagram, YouTube and** new kid on the block **TikTok**.
- **Original and fun content** is a key driver with regard to following an influencer. Taking into account the commercial connotation of influencers, their content creation skills are very important for keeping followers engaged. **Credibility is considered more important in the South than in the North**.

Influencer marketing: comparison with last year

85.1% of Belgian young people (active on social media) follow influencers. Compared to the 2019-2020 results for Flanders, more young people follow influencers (+ 4.5 percent points).

We also noticed some important differences according to age and gender.

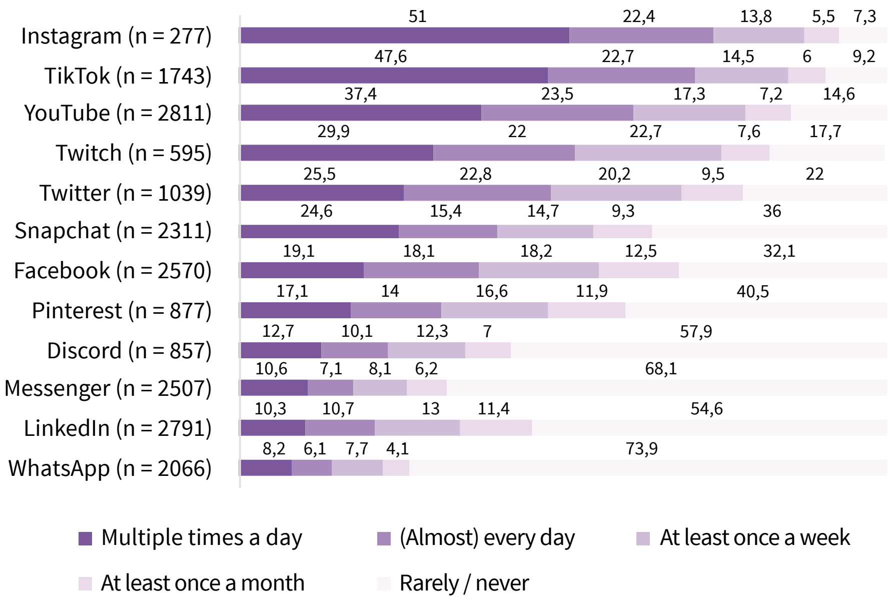
- Females are more inclined to follow influencers (89.8% follows influencers vs. 80.3% among males). Moreover, **females** (Mdn = 10) **tend to follow more influencers** compared to males (Mdn = 8).
- Older age groups (22-24y/o) tend to follow fewer influencers (Mdn = 6) compared to younger age groups (16-18 & 19-21 years old; Mdn = 10).
- No differences were found between the Dutch- and French-speaking young people.

Our qualitative research shows that 16-24 year-olds are **fully aware that influencers are a commercial tool**. For some, the strong commercial focus of influencers leads to negative evaluations.

> "Nep, alles doen voor geld, ik vind het echt niks" *(woman, 20 years)*
>
> "Eerlijk, ik kan het daar niet echt mee vinden omdat er veel zijn die dan betaald worden om iets te publiceren ook al is het product niet goed of niet kwalitatief ze gaan het altijd verwoorden dat dat het beste product is" *(man, 21 years)*
>
> "Il faut bien vendre d'une manière ou d'une autre... ils savent que si quelqu'un est apprécié par un public ce serait bête de ne pas l'exploiter, du moins pour moi c'est une manière de marketing comme une autre …" *(man, 19 years)*
>
> "Oui oui je sais c'est d'ailleurs ça qui me dérange, ils profitent de leur communauté pour se faire de l'argent en leur vendant des produits parfois bas de gamme. Certains ne sont pas assez honnêtes avec leur public." *(man, 19 years)*

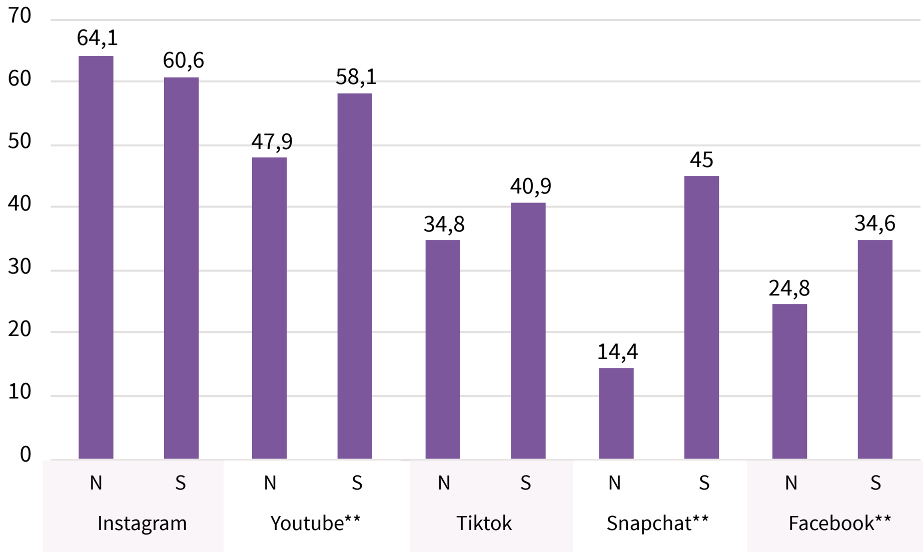
Figure 14 provides an overview of how often Belgian young people encounter influencers on different social media platforms. Only frequent users of the respective social medium (= participants who use the medium at least 1x per week or more) were included in the analysis.

Figure 14: Exposure to influencers by social medium (in % within user groups)



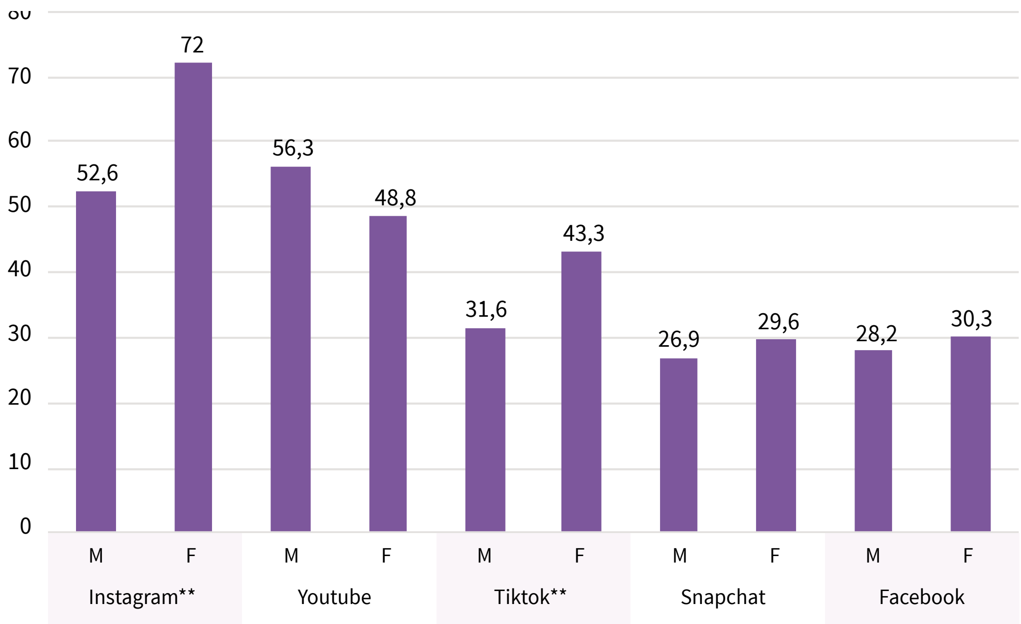
When comparing exposure to social media influencers on the top 5 influencer marketing platforms between Dutch-speaking and French-speaking young people, **French-speaking young people are significantly more likely to be in touch with influencers on YouTube, Snapchat and Facebook.**

Figure 15: (Almost) daily or more frequent exposure to influencers by social medium – comparison North - South (in %, n = 3263)



When comparing exposure to social media influencers on the top 5 influencer marketing platforms between males and females, females are significantly more likely to be in touch with influencers on Instagram and TikTok.

Figure 16: (Almost) daily or more frequent exposure to influencers by social medium – comparison males - females (in %, n = 3263)



In the following paragraphs, we take a closer look at the reasons for young people to follow influencers and their attitudes and behaviour concerning influencer marketing. Questions were only asked to young people that follow at least one influencer (n = 2649).

Original and fun content a key driver for following influencers on social media

HIGHLIGHT

- Irrespective of age, region and gender, the key driver for following influencers is their **fun and original content**. The possibility to learn from them and their brand use are next in line as drivers. Content creation skills are very important for influencers, in particular because of the commercial connotation they carry. Their content must first and foremost be fun & original!
- **Credibility** is more important in the South vs. North.

We asked young people that follow at least one influencer which 3 reasons they consider the most important for following an influencer. The absolute top reason (63.3%) is 'because (s)he posts fun / original content. Content creation skills are an important skill for influencers.

> "Das een stijl dat ik mega cool vind. En de manier waarop de foto's genomen zijn is ook puur talent." *(man, 18 years)*
>
> "Dat zijn alledrie belgen waar ik vrij sterk naar opkijk. Ze gaan op avonturen die me inspireren. De vrijheid die de posts uitstralen spreekt me aan." *(man, 20 years)*

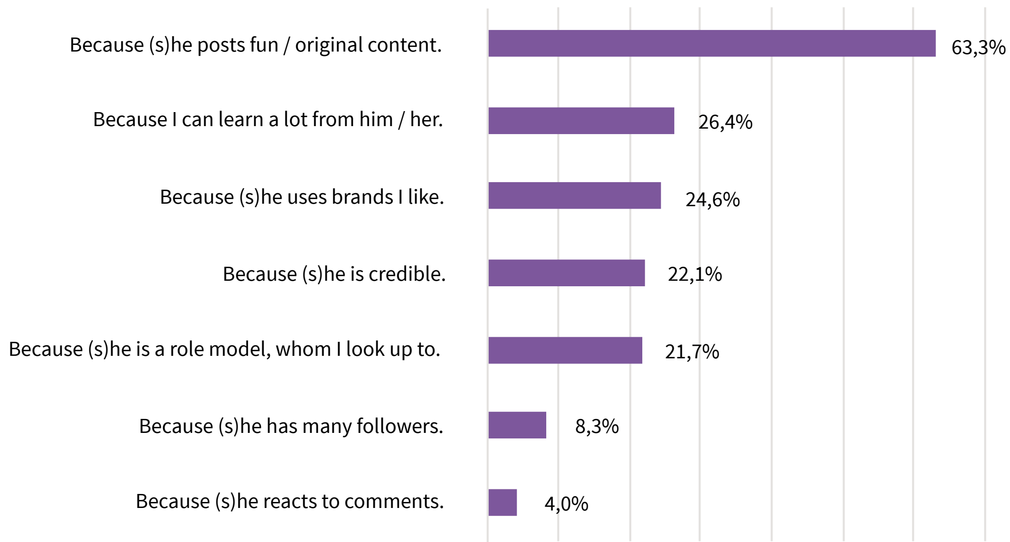
Other frequently indicated reasons were 'because I can learn a lot from him / her' (26.4%), 'because (s)he uses brands I like' (24.6%), 'because (s)he is credible' (22.1%) and 'because (s)he is a role model, whom I look up to' (21.7%). Having many followers (8.3%) and reacting to comments (4.0%) appear to be less important in order for influencers to be followed.

> "Wanneer ze inspirerend zijn, eerlijk overkomen, ... dan spreken ze me wel aan. Als het opvalt dat ze er alleen geld mee willen verdienen, dan vind ik ze minder leuk." *(man, 17 years)*

For **French-speaking young people, the 3 top reasons differ a little**, i.e. (1) 'Because (s)he posts fun / original content.' (59,4%) (2) 'Because (s)he is credible.' (29.3%), (3) 'Because (s)he uses brands I like.' (21.5%)'

> "Tiktok, j'ai cette application depuis moins longtemps donc j'ai surtout suivi ces influenceurs quand ils me donnaient de l'inspiration, ou du contenu drôle et chouette à regarder. Ou l'inspiration dans la façon de vivre. C'est dur de l'avoir mais j'essaie d'améliorer ma vie avec leur conseil ou leur routine. … ils ont l'air d'avoir la vie bien rangée, et c'est ce qui me plaît et c'est ce qui m'inspire !" *(woman, 20 years)*
>
> "J'aime bien leur style vestimentaire, mais aussi leur « comportement ». Elles mettent leurs partenariats en avant, mais pas au point de « forcer » les gens à acheter." *(woman, 17 years)*

Figure 17: Main reasons to follow an influencer (n = 3263)

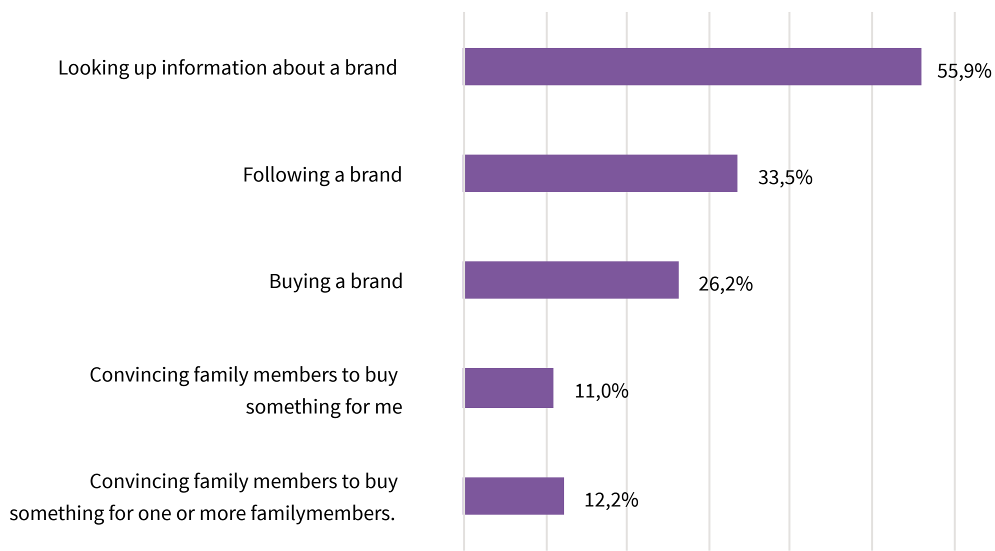


Using influencers for commercial purposes is effective

Most young people that already follow influencers, are convinced it's a **good move on the part of brands** to involve influencers for commercial purposes (73.8%). This holds both for the North and the South. For Flanders (74.1%), this figure has increased by 8.4% compared to 2019 (65.7%).

Collaboration with influencers also **pays off for brands**. For conversion, we probed for the extent to which young people looked up more information about a brand, started following a brand, started using a service or bought something an influencer promoted, and tried to convince family members to buy something an influencer promoted. Figure 18 provides an overview of these percentages based on the number of young people that follow at least one influencer.

Figure 18: Influencer marketing and conversion among young people (n = 3263)



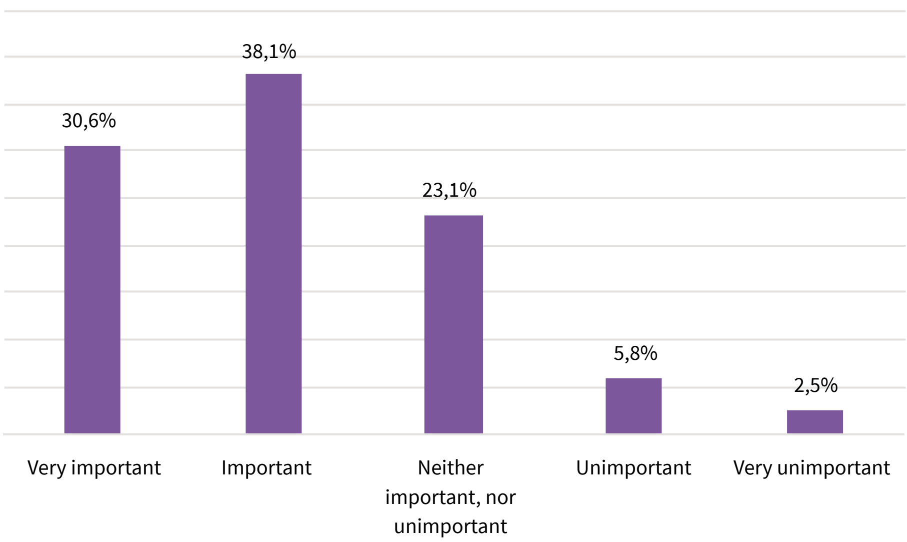
26.2% of young people who follow influencers indicate that they have **bought something an influencer has promoted in the past three months** and 33.5% indicated that they started following a brand an influencer has promoted in the past three months. Important! Percentage tests showed that:

- **Conversion to purchase is higher among French-speaking** (30.5%) vs. Dutch-speaking (22.5%) young people. French-speaking 16-24 y. o. young people are also more inclined to follow brands (38.8%) compared to Dutch-speaking (28.9%) young people.
- Moreover, **females** appear to be **more susceptible to influencer marketing** compared to males, as 36.9% of females started following a brand an influencer promoted and 29.7% bought something an influencer promoted, compared to 29.6% and 22.3% respectively among males.

Importantly, **young people attach a lot of importance to influencers being transparent about the commercial nature of their posts**. For Flanders, this remains as important as last year.

> "Ik denk dat voor een ouder publiek dit niet zo heel erg belangrijk is maar vooral jongere mensen moeten beseffen dat veel van die influencers gesponsord worden en dat het niet normaal is om zo veel spullen te hebben/kopen."*(woman, 22 years)*

Figure 19: How much importance do young people attach to influencers making the commercial nature of their posts known



To conclude, 183 (5.6%) respondents consider themselves a social media influencer; however, 50 of them did not cooperate with any brands in the past year.

Influencer marketing getting more mature

Apart from the increasing impact of influencer marketing by young people, there is a similar trend on the side of the retail brands. A lot of the retail brands have experienced influencer marketing as becoming more mature. It is now more than a fad:

> "Er is echt wel sprake van een verdere professionalisering van influencermarketing. In Nederland is dat al langer bezig. België is nu drie jaar later aan het volgen wat er gebeurde in Nederland. Als je nu influencers in het nieuws ziet komen, dan weet je dat ze steeds belangrijker worden. Ik denk dat lange tijd onderschat is wat de impact van die inlfuencers geweest is." *(Jules Thys, digital content manager Foodmaker)*

On the other hand, for some retailers, influencer marketing is a very important channel for getting in touch with specific groups of (potential) customers such as young people:

> "Influencers zijn de schakel tussen ons als merk en de doelgroepen van Decathlon: jongeren, gezinnen en dagelijkse sporters. Jongeren zijn één van onze belangrijke doelgroepen, die via de traditionele kanalen moeilijker te bereiken zijn. Wij moeten aanwezig zijn op alle kanalen waar ook de jongeren actief zijn. Als we dat niet doen, missen we een deel van onze missie. Influencers zijn voor ons ook één van dé manieren om jongeren aan te spreken." *(Krystelle Walders, digital communication leader Decathlon)*

Matching influencers with the brand personality of the retail brand is very important to ensure the success of influencer marketing:

> "We hebben een aantal parameters ontwikkeld waaraan onze influencers moeten voldoen. In het verleden merkten we dat dat niet altijd juist zat. Nu screenen we vooraf bijvoorbeeld de stijl van de influencer, de content die ze creëren, tone-of-voice, maar ook of het past bij Dreamland en onze waarden en onze eigen communicatie." *(Eef Goossens, social media manager Dreamland)*

Also, the strategy that retail brands use to ensure influencer marketing has the maximum effect, is getting more and more specific. The alignment of the influencer marketing strategy with the business strategy is increasingly hyper-focused:

> "Als we lokale micro-influencers inzetten, heeft dat op gebied van engagement en zelfs conversie een grote impact. Ondanks dat micro-influencers niet zoveel volgers hebben in vergelijking met macro-influencers. Een micro-influencer is meestal lokaal gekend en heeft een sterkere band met zijn of haar volgers. Deliveroo wil vooral een lokale partner zijn en micro-influencers passen perfect binnen deze strategie." *(Jorina Steenput, content marketing manager Deliveroo)*

One of the biggest challenges for influencer marketing still resides in measuring its impact:

> "We zien zeker het mogelijke potentieel van influencermarketing voor ons merk. Momenteel is de kost ook nog eerder laag. Maar het is moeilijk om een scherp beeld te krijgen wat de return van influencermarketing is. Dat is ook de reden waarom we het tot op heden nog niet structureel hebben ingezet. Enkele one-shots blijken wel al veelbelovend, echter om dit always on in te zetten, moeten we nog de juiste invalshoek vinden". *(Donovan Mazzoni, e-commerce manager Krefel)*

Regardless of the impact of influencer marketing, some retail brands have decided that influencer marketing is not the best tool for their marketing mix:

> "Als we naar onze tests kijken, waren de resultaten bij micro-influencers niet in lijn met onze verwachtingen. Met grotere namen hebben we tests gedaan in Denemarken, waar de boost qua kwaliteit en reach (bereik) prima was. (...) Maar om echt tot duurzame conversie te komen, bleek influencermarketing voor ons toch niet de beste keuze."
> *(Stephanie Dewulf, marketing manager Benelux, Veepee (Vente-exclusive.com))*

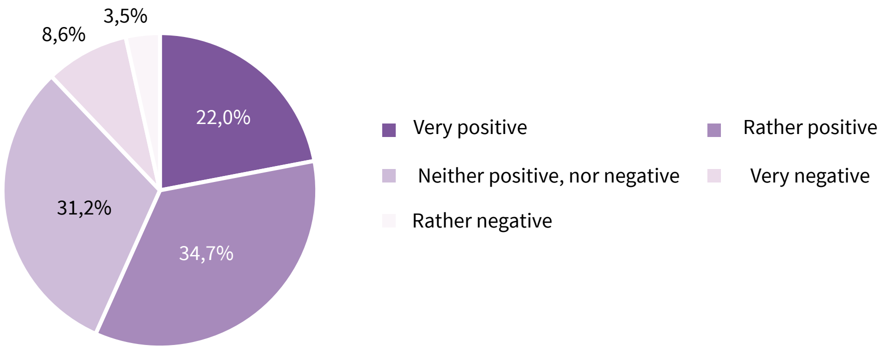
GIVEAWAYS

HIGHLIGHTS

- Giveaways are effective. The majority of young people expressed a positive or neutral attitude towards giveaways. This positive attitude is confirmed by a high participation rate (almost 1 out of 2 have already participated).
  - » Giveaways are even more successful in the French-speaking part of Belgium: more positive attitude and higher participation rate.
  - » Females are also more inclined to participate in giveaways than male young people.
- A key driver to participation is the opportunity to win nice things with little effort. A key barrier to participation is a low chance of winning.

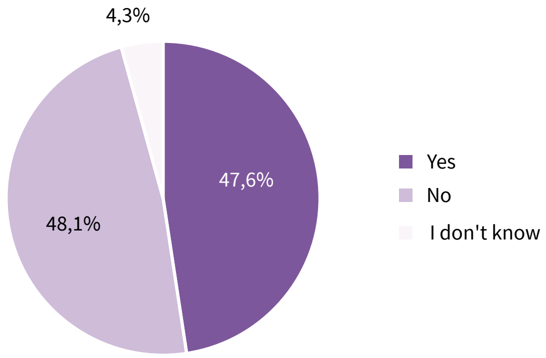
First, we gauged for young peoples' attitude towards and participation in giveaway campaigns on social media. By this we mean prizes, products, ... that are given away for free by brands and/or that they can win.

Figure 20: Attitude towards giveaways on social media (n = 3072)



Next, we asked whether they had ever participated in giveaways on social media. The results were about 50-50.

Figure 21: Participation in giveaways on social media (n = 3072)



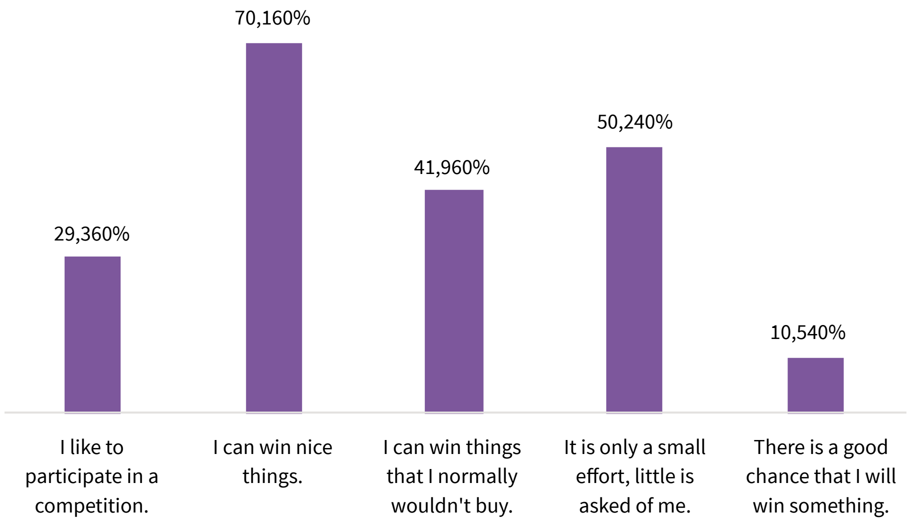
Further analyses showed that women tend to be more positive about giveaways on social media and tend to participate more often in giveaways on social media compared to men. Moreover, French-speaking young people tend to be more positive about giveaways on social media and tend to participate more often in giveaways on social media compared to Dutch-speaking young people.

When comparing different age groups, no differences were found with regard to the attitude towards giveaways on social media; however, the middle age group (19-21 years) tends to participate in giveaways the most, followed by the oldest (22-24 years) and the youngest age group (16-18 years).

> "Honnêtement oui je participe souvent aux concours 😇." *(woman, 20 years)*
>
> "En ce moment et depuis décembre je participe à beaucoup de concours… Je participe à tout ce que je vois et à tout ce que je peux participer 😂 (en tenant compte que certains sont réservés pour la France ou autres pays par exemple) Quand je dis de tout c'est par exemple des vêtements, des bons d'achat, des produits, du maquillage, de la nourriture, des voyages,... même pour des bêtes choses, je sais que si je gagne je peux en faire profiter mes proches donc je n'hésite pas😊 D'ailleurs j'en ai déjà gagné plusieurs😂 j'ai gagné des crèmes, des vêtements de sport, un album photo, des accessoires (chouchou et foulard) entre autre😁 (je suis vraiment chanceuse🤩)." *(woman, 22 years)*

To gain insights into the reasons why young people do or do not participate in giveaways on social media, we asked young people who stated that they participate in giveaways (n = 1431) to give the reasons why they did so and vice versa for young people who stated that they do not participate in giveaways on social media (n = 1478).

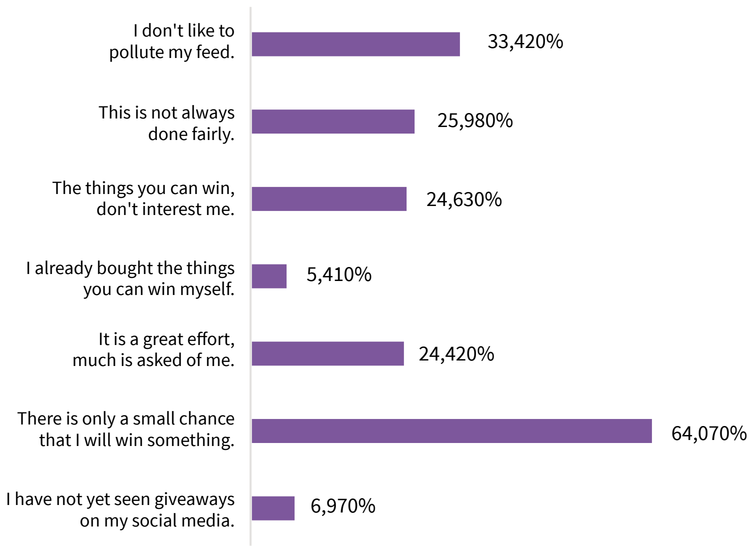
Figure 22: Top reasons for participating in giveaways on social media (n = 1461)



“Wel nog fijn op zich, dat geeft een kans aan mensen die een product misschien niet kunnen betalen om het toch te hebben.” *(woman, 17 years,)*

“Je participe en réalité à plein de concours, pour gagner des petits voyages, des cadeaux qui me seraient utiles (en cuisine par exemple).” *(woman, 22 years)*-

Figure 23: Top reasons for not participating in giveaways on social media (n = 1478)



“ik ga eerder meedoen bij minder bekende kleine ‘winkels’ dan bij grote zoals bijvoorbeeld Nakd? Omdat ik ten eerste het gevoel heb dat je dat toch niet kan winnen, plus er zit precies ook altijd een addertje onder het gras, terwijl die die ‘herkenning’ minder nodig hebben dan die kleinere online initiatieven.” *(woman, 20 years)*

“Mais jamais un concours organisé par un influenceur, ni un youtubeur. Car il y a souvent beaucoup trop de participants, et donc j’ai l’impression de perdre d’avance. Surtout les concours d’influenceurs, il y a des milliers de gens qui y participent à ces concours.” *(woman, 20 years)*

SOCIAL MEDIA AND BRANDS: INSIGHTS PER RETAIL SECTOR

In addition to their general use of social media and exposure to brand-related content, we also specifically gauged for the **extent to which young Belgians encounter brands from nine different (retail)sectors**.

To avoid an overload of questions (and therefore also dropout of participants), participants were randomly assigned to four of the nine surveyed sectors. For each of the assigned sectors, they filled out a set of questions, which also depended on their social media usage. Only the frequent users of a social media channel (= at least 1x per week or more) were asked questions related to the respective medium.

In the overview below, we have indicated which social media channel has the largest reach among young Belgians per retail sector and which social media may offer opportunities.

Table 1: Which social medium to use to reach young Belgians per (retail)sector

Retailsector	Social media channel(s) with the widest reach	Opportunities
Fashion	Instagram, Facebook, YouTube	Pinterest Instagram (South) and TikTok (South)
Health	Instagram, YouTube and Facebook	
Beauty	Instagram, YouTube and Facebook	
Electronics	YouTube, Instagram and Facebook	
Interior	Instagram and YouTube	Pinterest (North)
DIY	YouTube, Instagram and Facebook	Pinterest
Garden and animal	Instagram, Facebook and YouTube	
Toys and games	YouTube, Facebook and Instagram	Twitch
Food and beverage	Instagram, Facebook and YouTube	

In the paragraphs below, we gave developed specific insights per retail sector.

Percentages that reflect **penetration** (= how often they are exposed to brand-related content from the sector via different social media channels) are calculated based on the number of participants who were assigned to the sector in question. Percentages of non-frequent users of the social media channel in question are also reported.

Percentages that reflect **evaluation** (= do these young people want to be more, less or equally exposed to brand-related content from the sector via different social media channels) are calculated for participants who were assigned to the sector in question and who are frequent users of the social media channel in question (= at least 1x per week or more).

Fashion

HIGHLIGHTS:

- The most important channel for branded content related to fashion is Instagram, followed by Facebook and YouTube. This top 3 is similar in both regions, though with a higher importance of Instagram in the North and of YouTube in the South.
- A social media channel in relation to which young people expressed some interest in more communication about fashion is Pinterest. French-speaking young people are also more open to Fashion-related content on Instagram and TikTok.

Figure 24: How often are young people exposed to brand-related content from the fashion sector via the following social media? (in %; n = 3263)

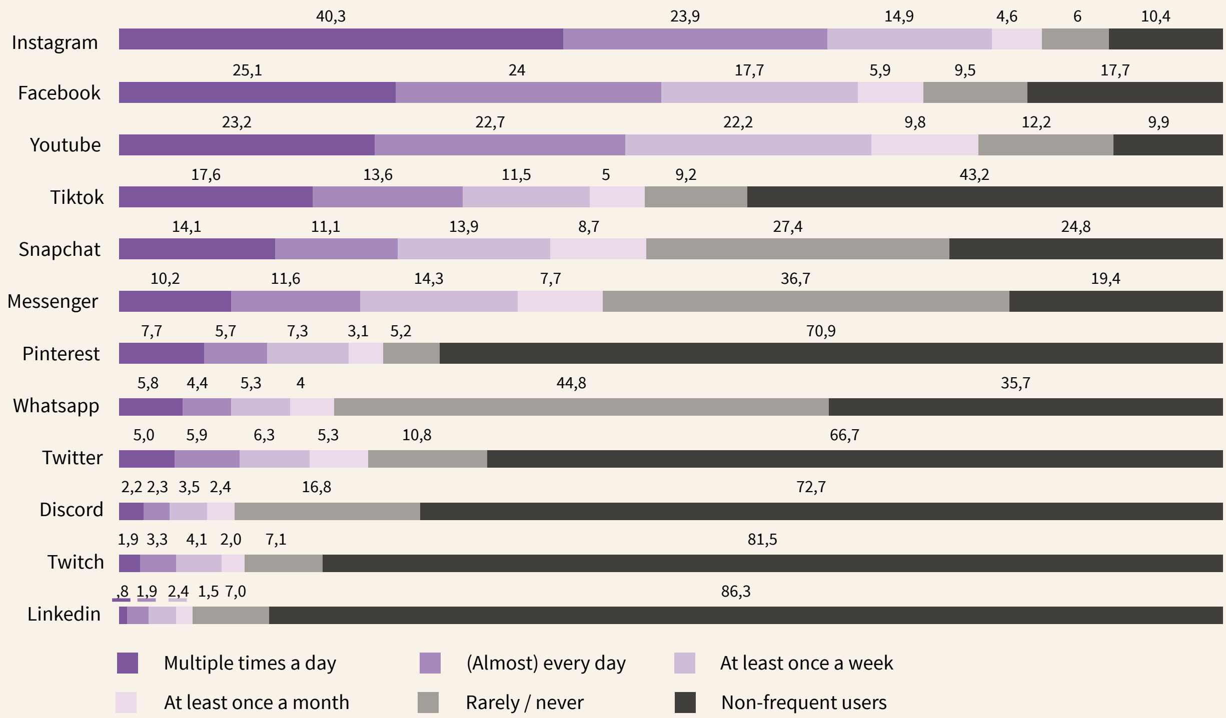
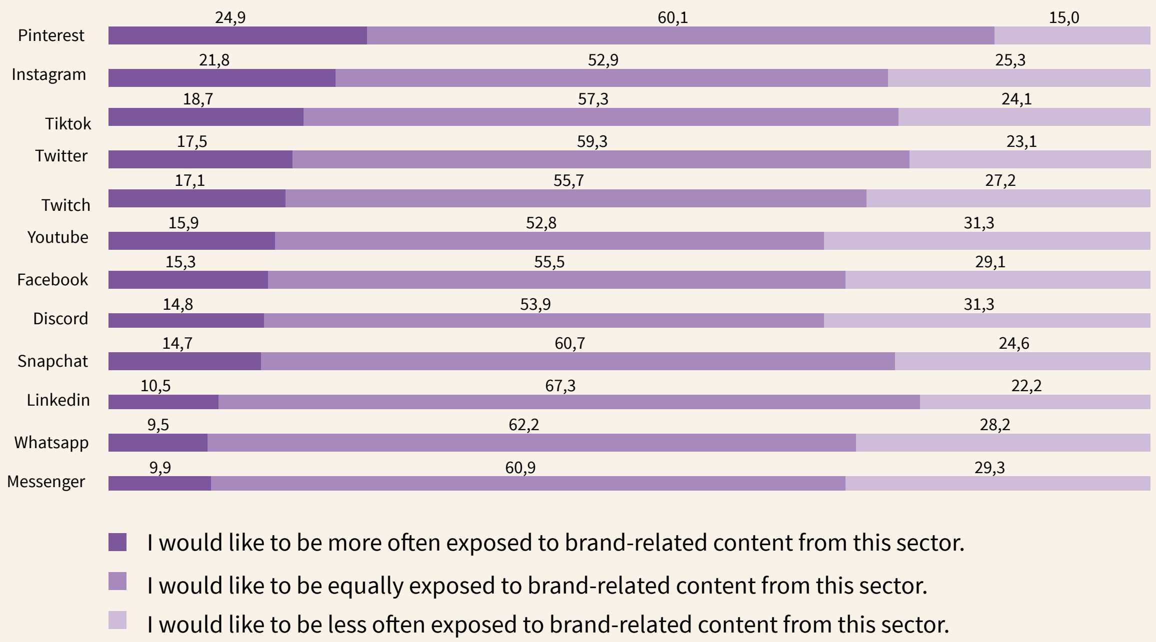


Figure 25: Do young people want to be more often, equally or less often exposed to brand-related content from the fashion sector? (in %, n = 1402)



Health

HIGHLIGHTS:

- The most important channels for branded content related to health are Instagram, YouTube and Facebook. This top 3 is similar in both regions, but the importance of these channels is higher among French-speaking young people while Instagram is more important for Dutch-speaking young people.
- Interest in more content about health is limited, except among French-speaking users of Twitch and Discord who are open to more branded content about health on these channels.

Figure 26: How often are young people exposed to brand-related content from the health sector via the following social media? (in %; n = 3263)

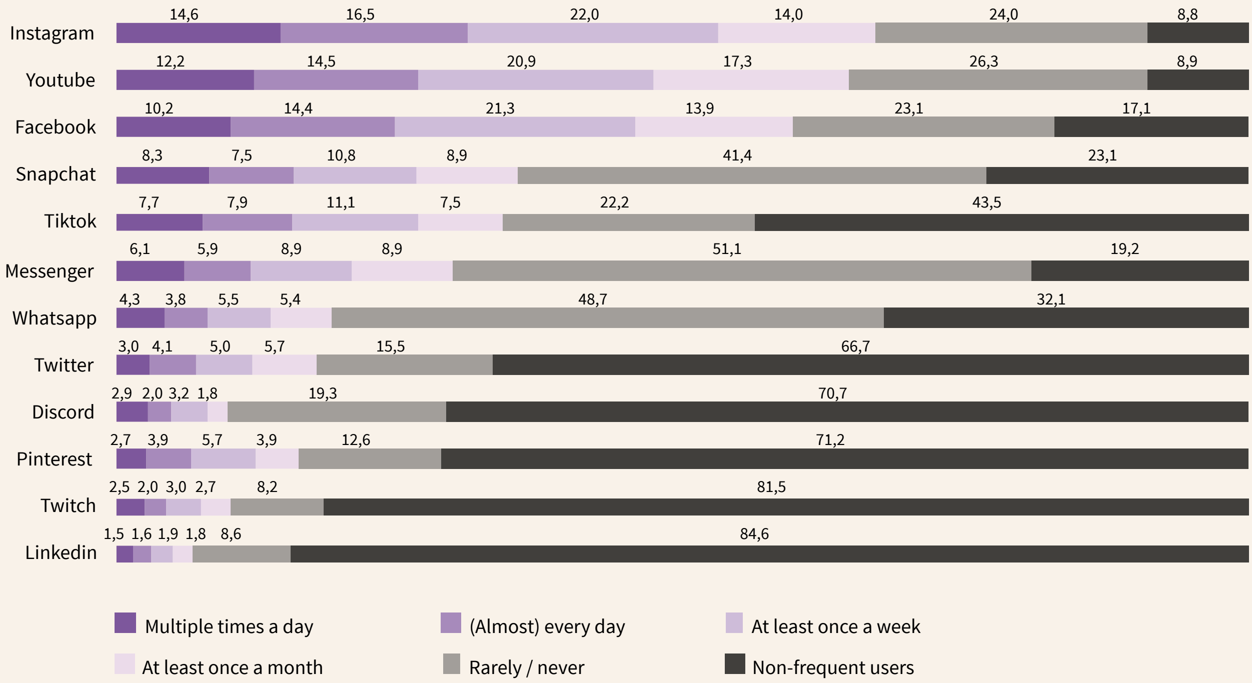
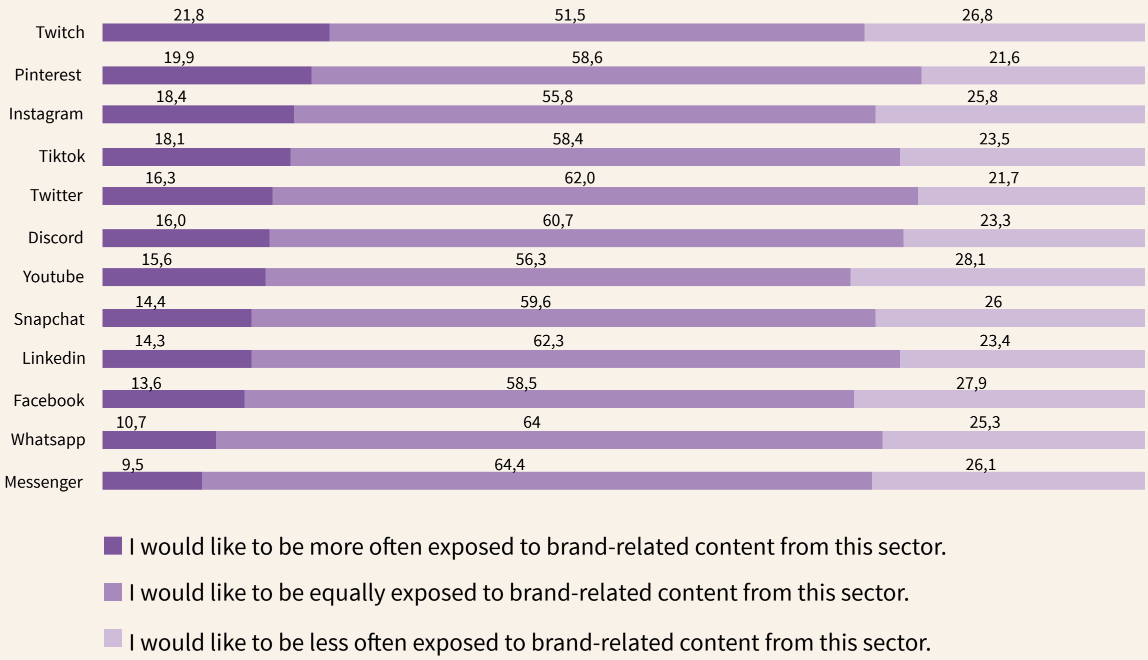


Figure 27: Do young people want to be more often, equally or less often exposed to brand-related content from the health sector? (in %, n = 1378)



Beauty

HIGHLIGHTS:

- The most important channels for branded content related to beauty are Instagram, YouTube and Facebook.
- No real interest for more communication about beauty. This holds for both regions.

Figure 28: How often are young people exposed to brand-related content from the beauty sector via the following social media? (in %; n = 3263)

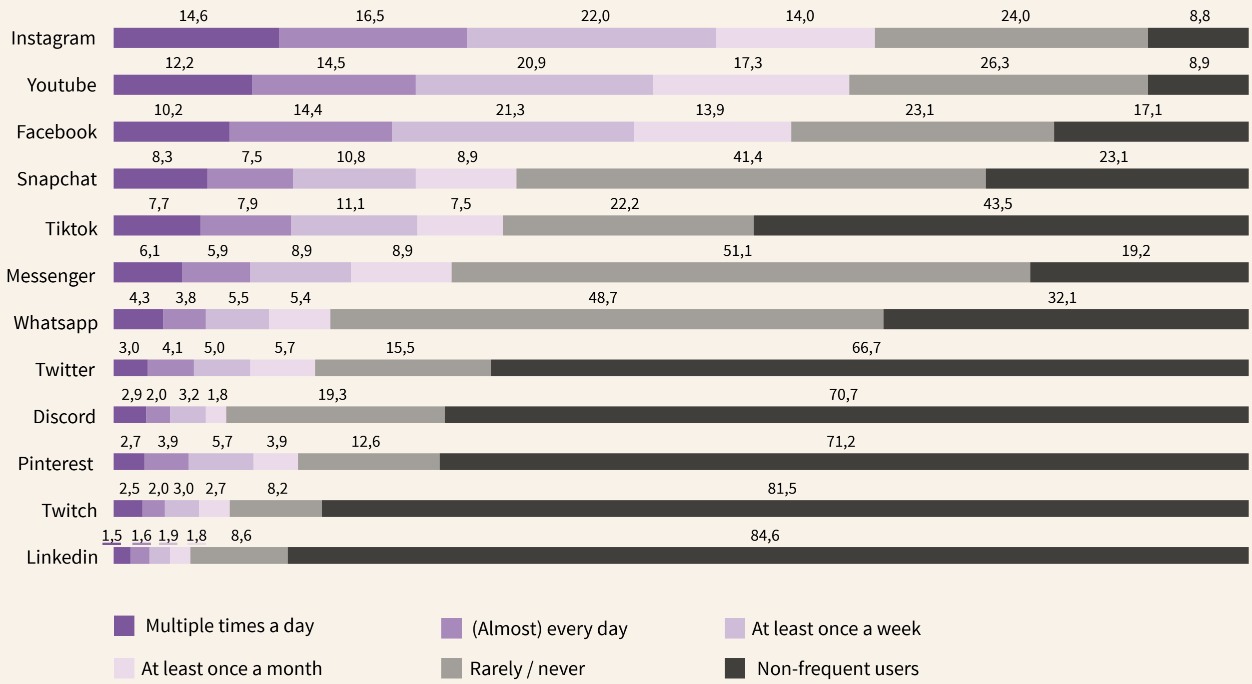
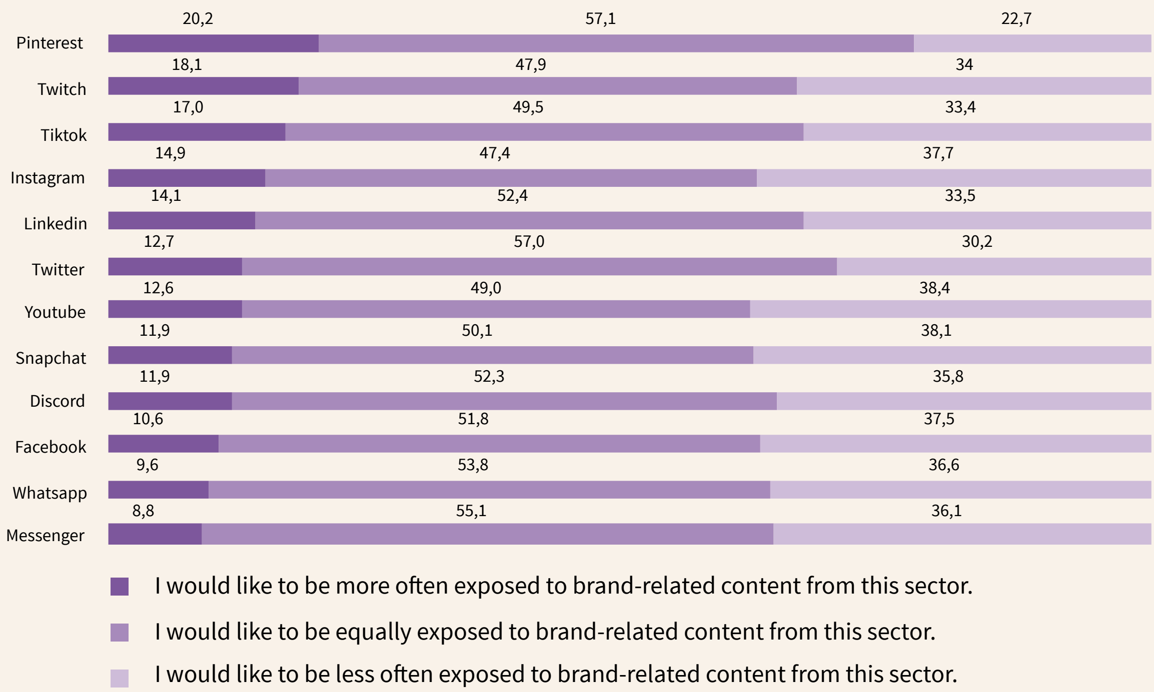


Figure 29: Do young people want to be more often, equally or less often exposed to brand-related content from the beauty sector? (in %, n = 1409)



Electronics

HIGHLIGHTS:

- The most important channels for branded content related to Electronics are YouTube, Instagram and Facebook.
- No real interest in more communication about Electronics.

Figure 30: How often are young people exposed to brand-related content from the electronics sector via the following social media? (in %; n = 3263)

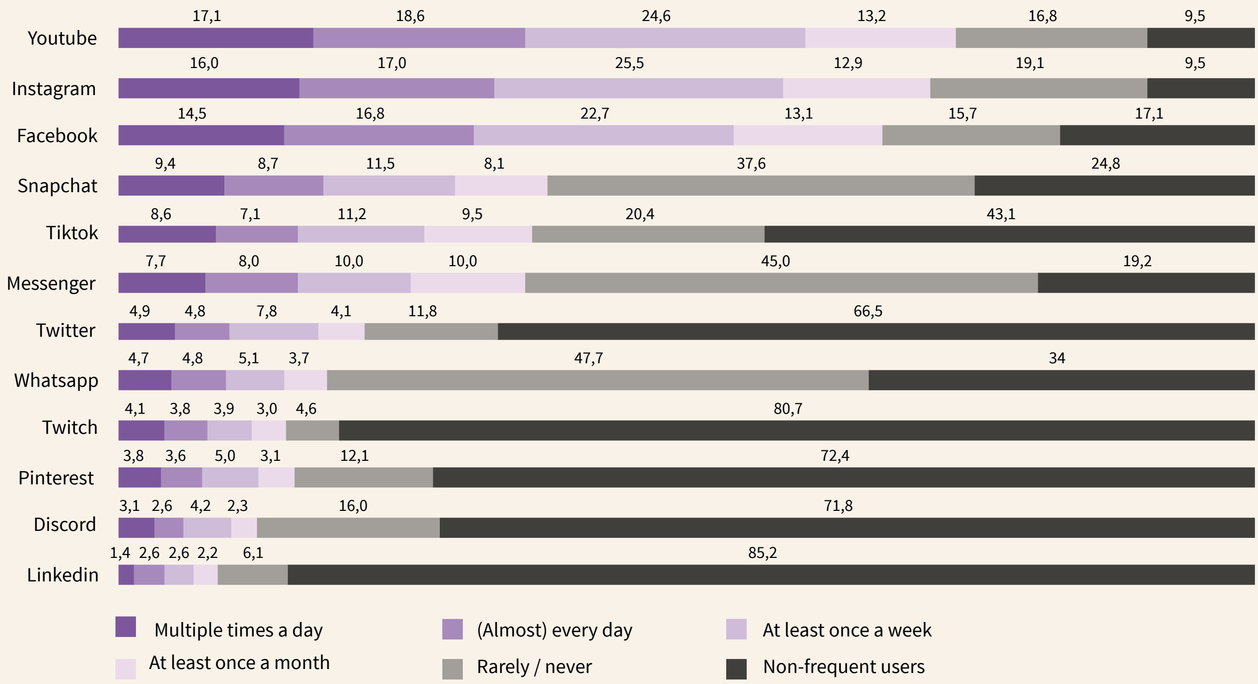
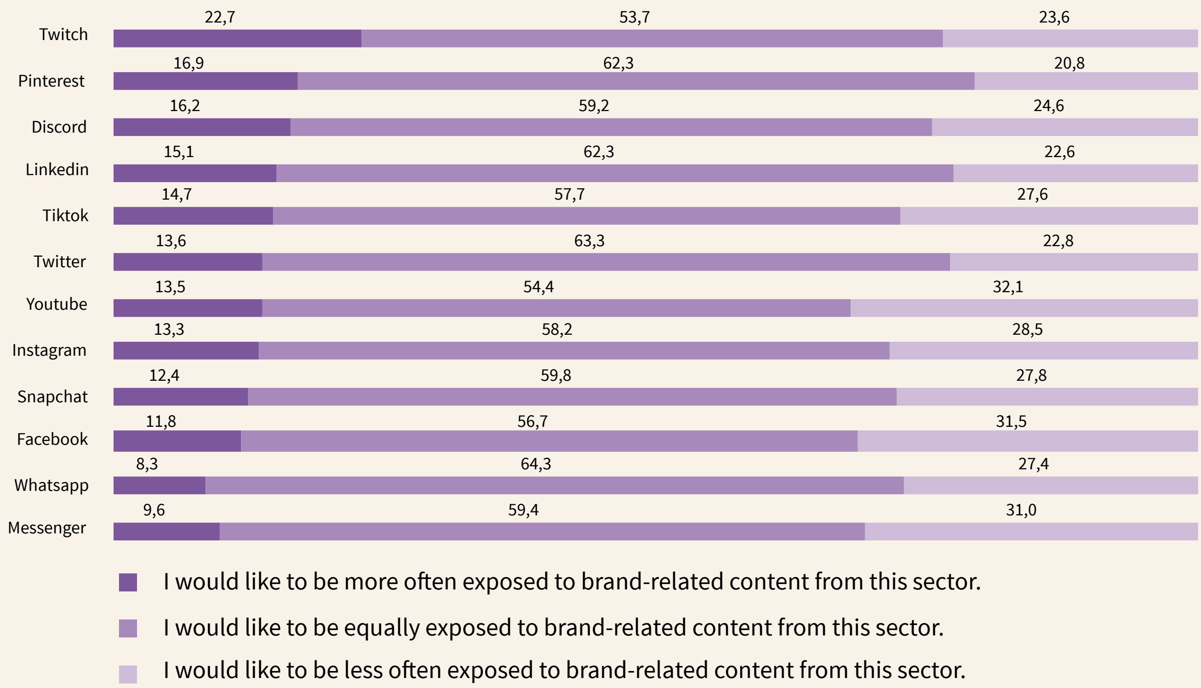


Figure 31: Do young people want to be more often, equally or less often exposed to brand-related content from the electronics sector? (in %, n =1390)



Interior

HIGHLIGHTS:

- The most important channels for branded content related to interior are Instagram and YouTube. The latter is especially important in the South.
- Dutch-speaking Pinterest users expressed the most interest to be served branded content.

Figure 32: How often are young people exposed to brand-related content from the interior sector via the following social media? (in %; n = 3263)

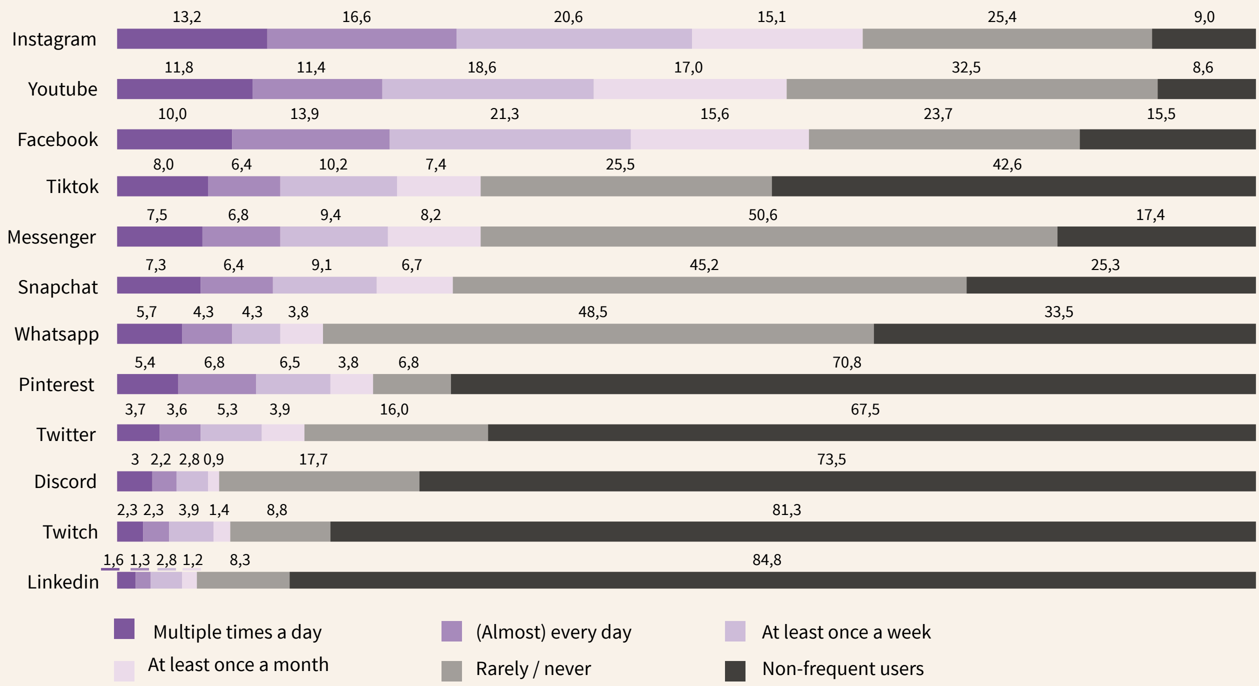
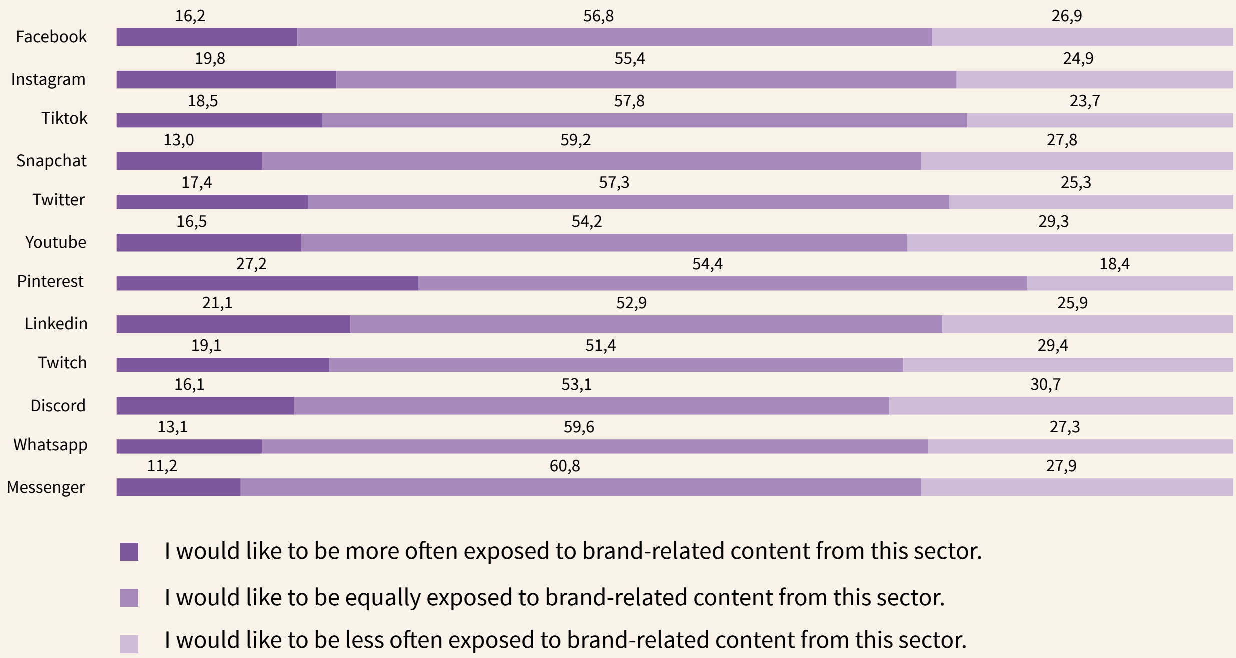


Figure 33: Do young people want to be more often, equally or less often exposed to brand-related content from the interior sector? (in %, n = 1384)



Do-It-Yourself (DIY)

HIGHLIGHTS:

- The most important channels for branded content related to DIY are YouTube, Instagram and Facebook.
- No real interest in more communication about DIY. Nonetheless, the biggest opportunity might be Pinterest (though there is also a group of users that is quite reluctant to be exposed to more content).

Figure 34: How often are young people exposed to brand-related content from the DIY sector via the following social media? (in %; n = 3263)

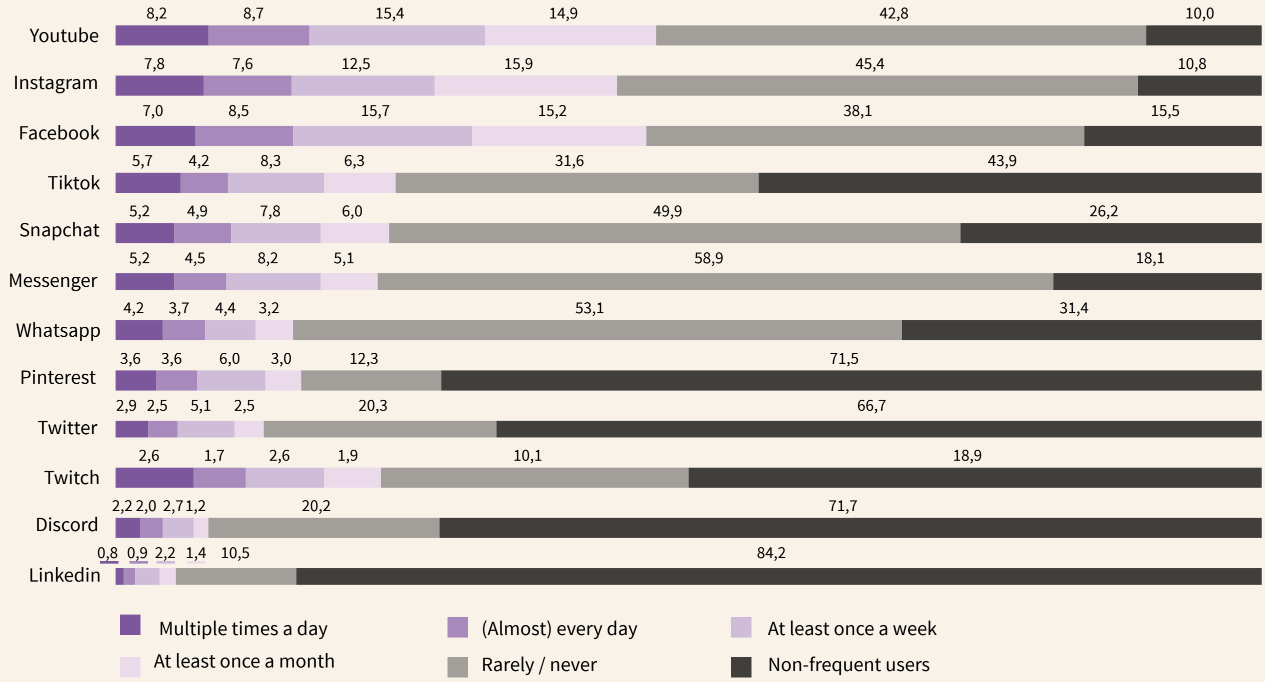
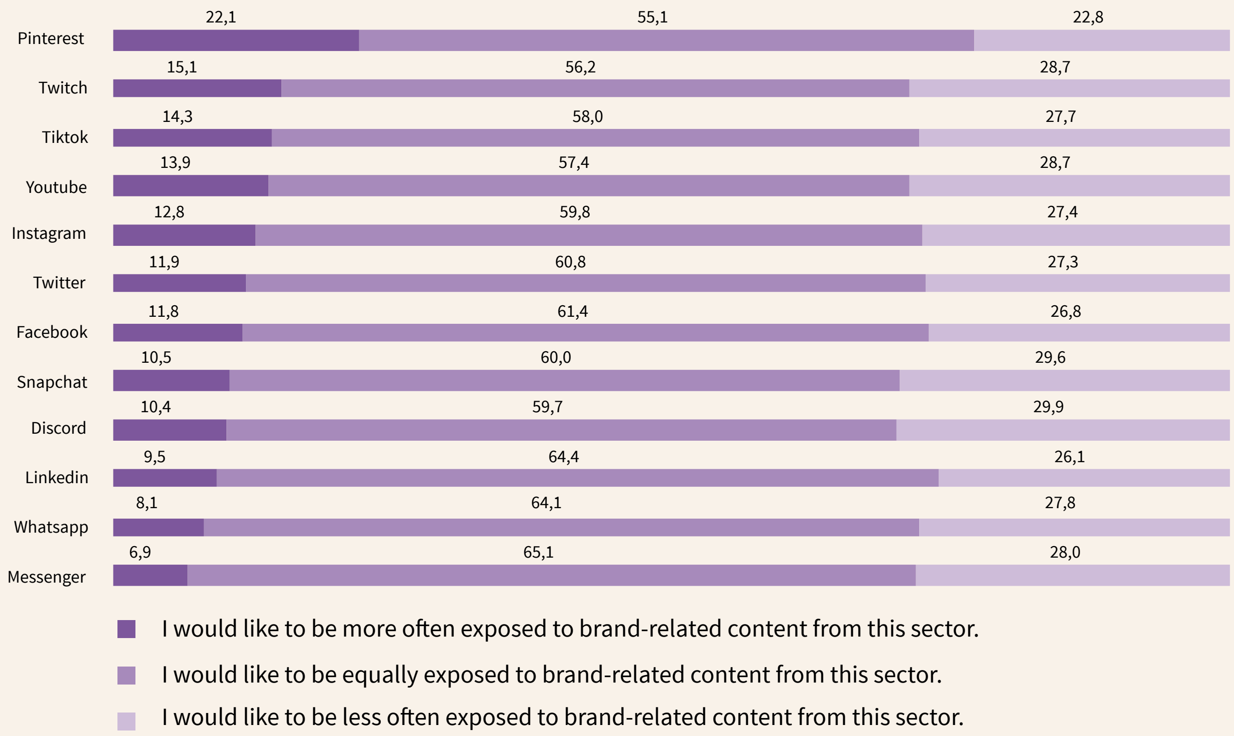


Figure 35: Do young people want to be more often, equally or less often exposed to brand-related content from the DIY sector? (in %, n = 1381)



Garden and animal

HIGHLIGHTS:

- The most important channels for branded content related to garden and animals are Instagram, Facebook and YouTube.
- No real interest to be served more content about this category.

Figure 36: How often are young people exposed to brand-related content from the garden and animal sector via the following social media? (in %; n = 3263)

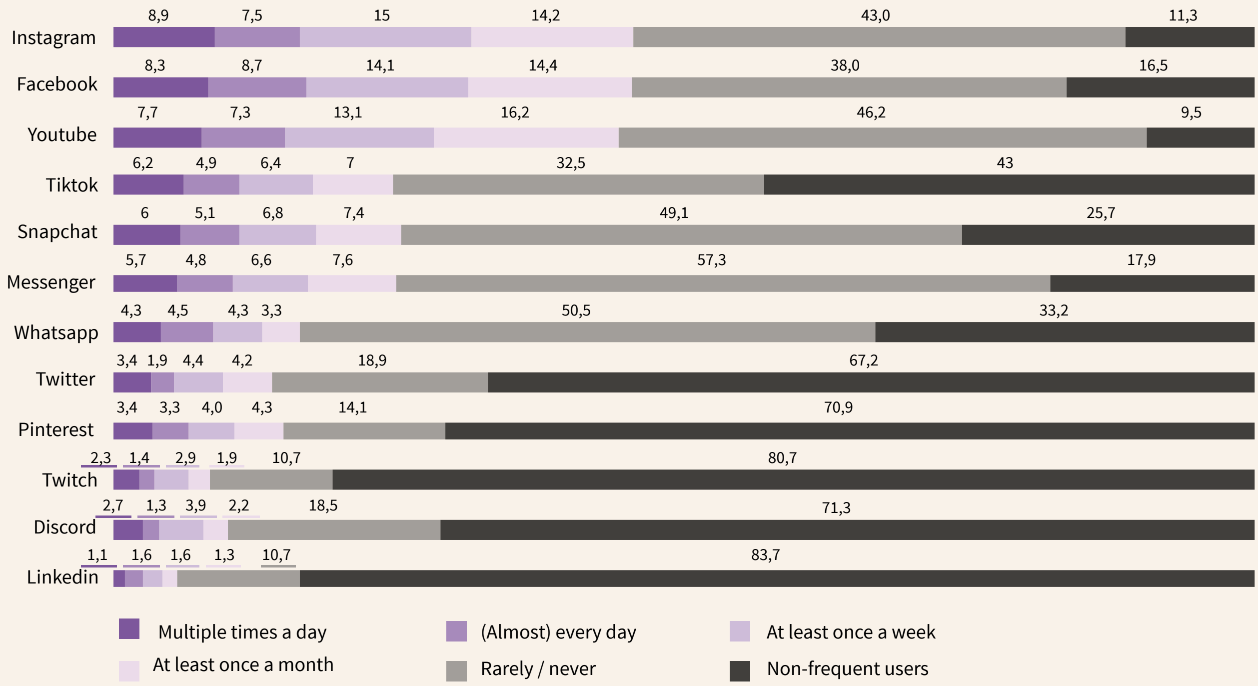
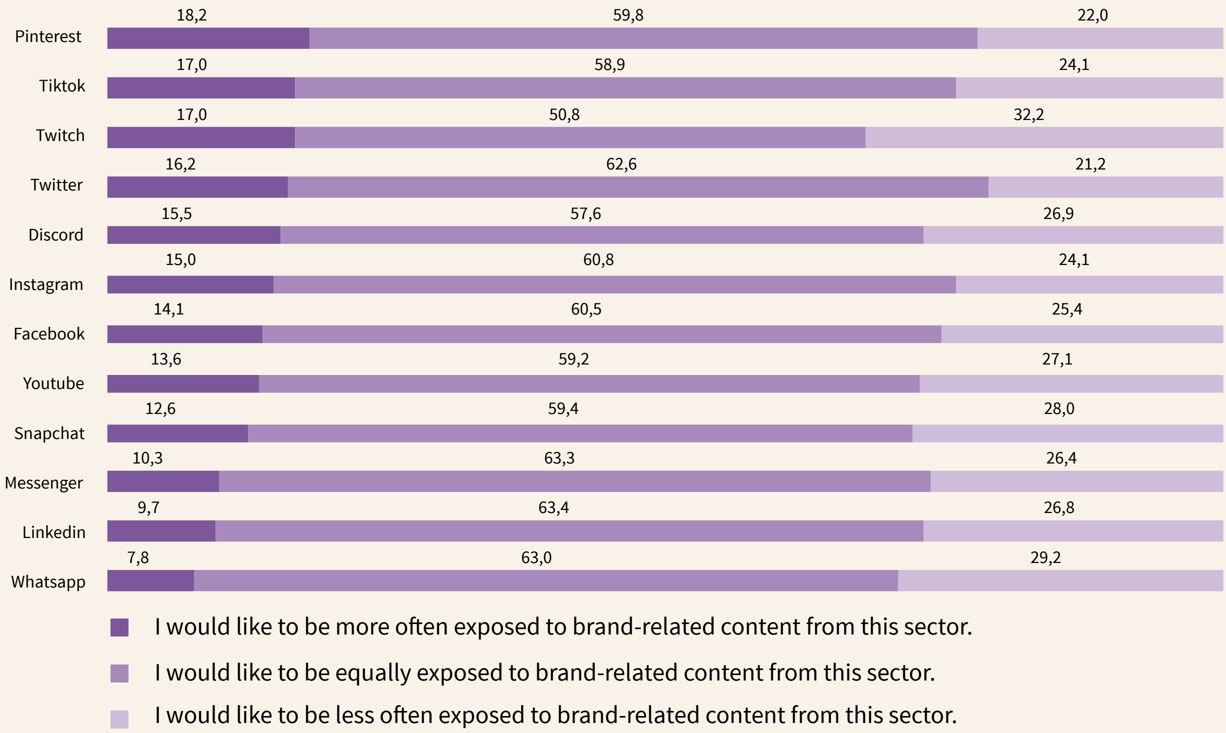


Figure 37: Do young people want to be more often, equally or less often exposed to brand-related content from the garden and animal sector? (in %, n = 1379)



Toys and games

HIGHLIGHTS:

- The most important channels for branded content related to toys and games are YouTube, Facebook and Instagram
- Twitch users are most interested in being served brand communication about games.

Figure 38: How often are young people exposed to brand-related content from the toys and games sector via the following social media? (in %; n = 3263)

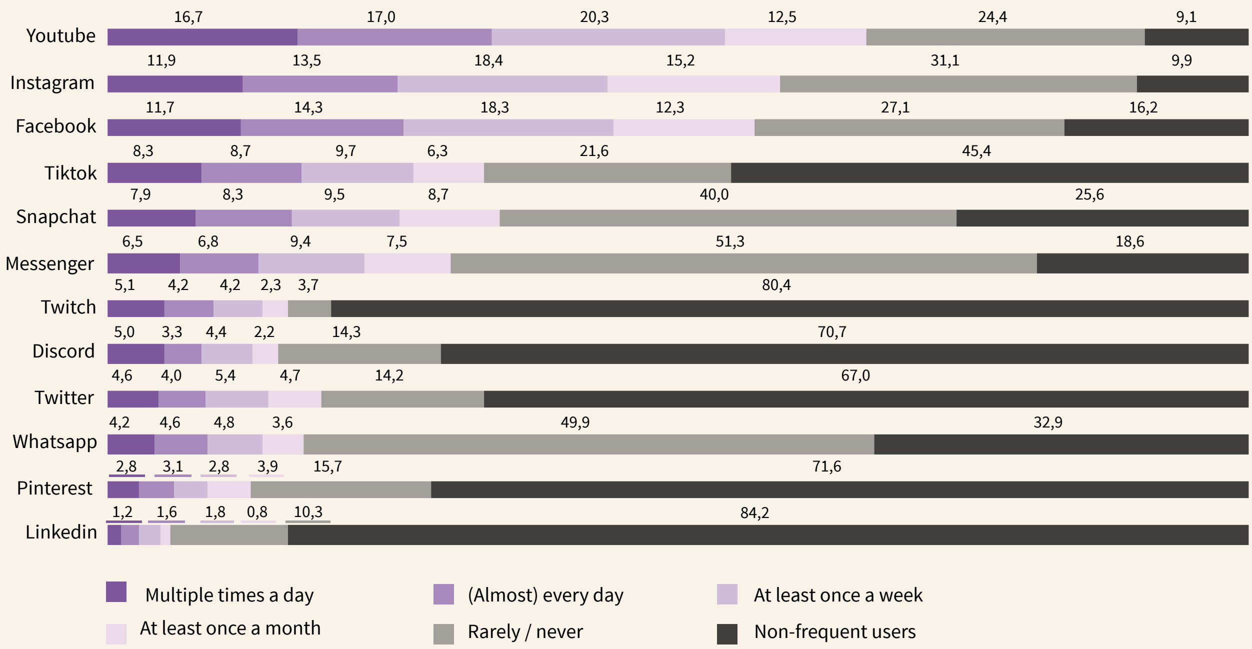
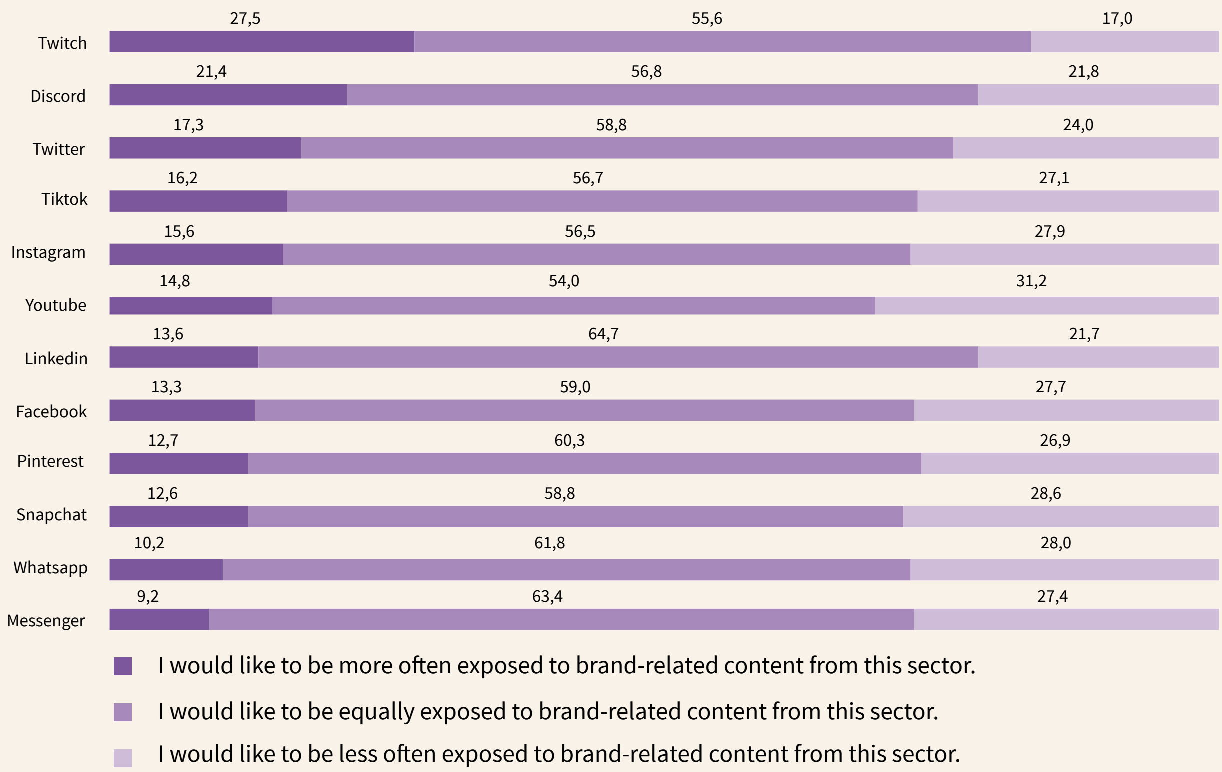


Figure 39: Do young people want to be more often, equally or less often exposed to brand-related content from the toys and games sector? (in %, n = 1408)



Food and beverage (on-trade)

HIGHLIGHTS:

- The most important channels for branded content related to food and beverage are Instagram, Facebook and YouTube.
- No real interest in more communication about food and beverages.

Figure 40: How often are young people exposed to brand-related content from the food and beverage sector via the following social media? (in %; n = 3263)

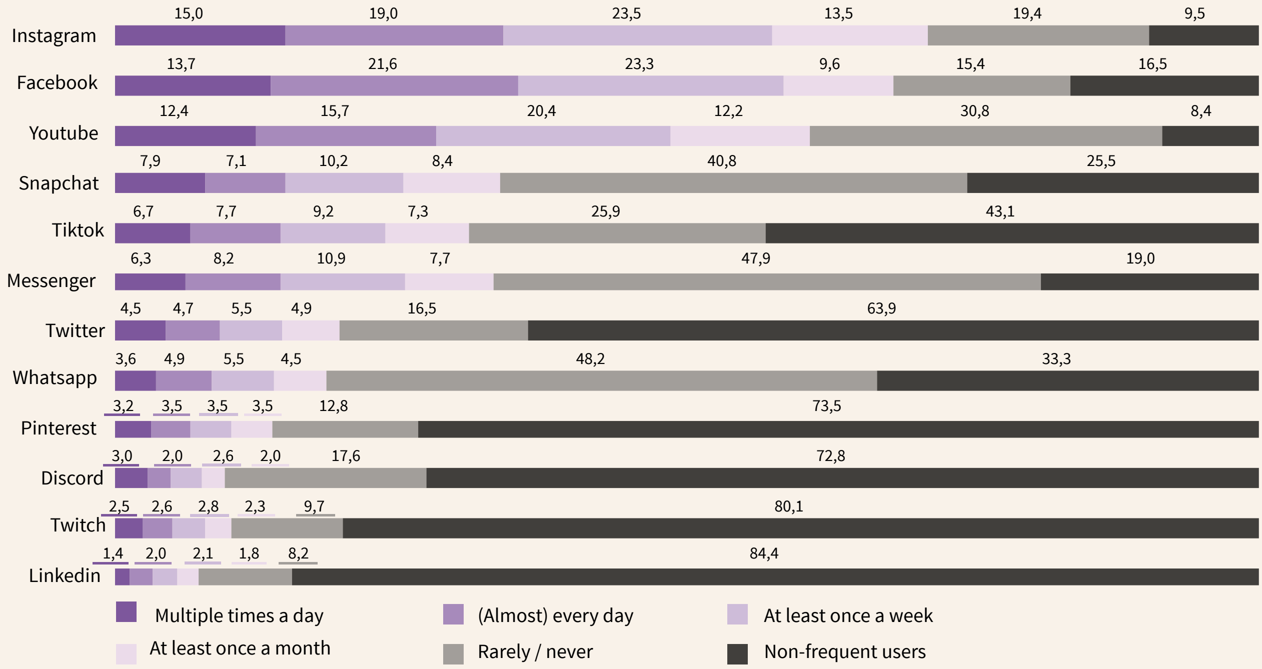
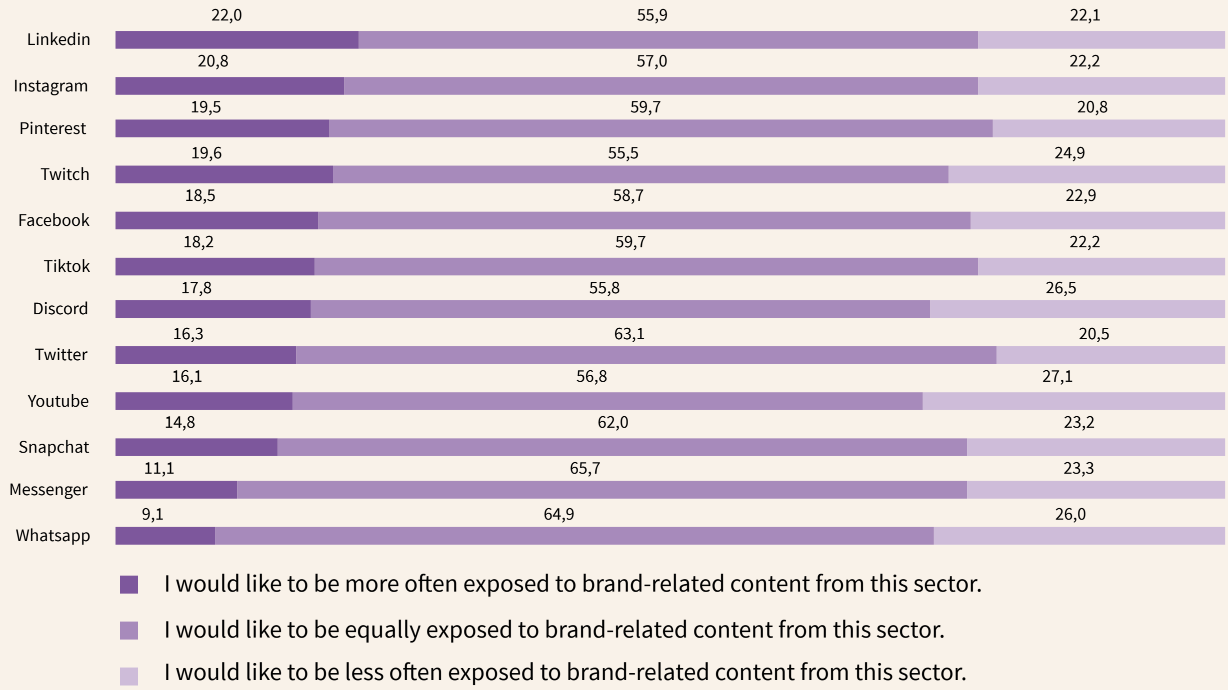


Figure 41: Do young people want to be more often, equally or less often exposed to brand-related content from the food and beverage sector? (in %, n = 1389)



ACKNOWLEDGEMENT

We were very proud to launch the first edition of the SMI-barometer (Social Media & Influencer marketing barometer) last year after five years of research in the field of social media, influencer marketing and young people. The reactions we got to the launch of the first edition were overwhelming.

Today we are even prouder to launch the second edition of the SMI-barometer. After all the questions we received about trends and evolutions in the use of social media and influencer marketing by Belgian young people, we are thrilled to present this second edition full of insights into this particular field. We hope that this second edition will help you to use social media and influencer marketing in the most effective way for your (retail)brand in Belgium.

Last year's insights only applied to Flanders; this second edition provides insights for Belgium as a whole. This was only possible thanks to the support provided by Comeos, which represents the Belgian retail sector. Comeos not only funded this research but was also a reliable partner in sharing their knowledge of the retail sector. Kristof, Wim and the whole team at Comeos: thanks for the great collaboration!

Furthermore, insights from the marketing and social media managers of the different retail brands were crucial for this research report. Anneleen Vantomme (Bel & Bo), Yenthe Van den Abbeele (ZEB), Jules Thys (Foodmaker), Stephanie Dewulf (Veepee, vente-exclusive.com), Krystelle Walders & Wing Tji Liu (Decathlon), Jorina Steenput (Deliveroo), Eef Goossens (Dreamland), Elke Devuyst (Vandenborre) & Donovan Mazzoni (Krefel): thanks for your enthusiasm, interesting insights and transparency.

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We considered leaving a hidden message for influencers in these acknowledgments, but that would have made things too complicated. We are absolutely grateful that you made the effort to read this report until its very end.

Good luck and all the best with your social media strategy and influencer marketing!

Jeroen Naudts, Ilse Bruwiere, Marijke De Veirman and Eveline Mollaert

May 2021

PS: Do you have questions concerning this topic? Do you want to learn more? Or do you want an extended talk about the results of this report? Contact us via jeroen.naudts@arteveldehs.be

LIST OF FIGURES AND TABLES

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SMI Barometer

How do Belgian youngsters experience
branding and influencer marketing via social media?

2020-2021

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