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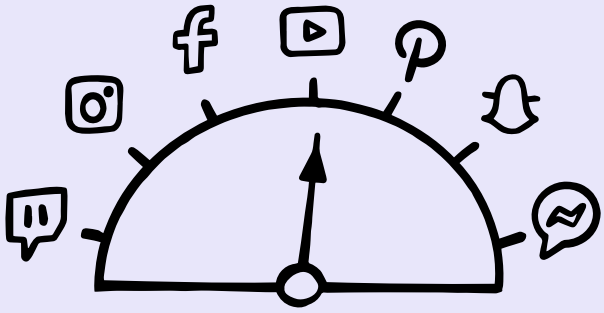

SMI BAROMETER

SOCIAL MEDIA & INFLUENCER MARKETING INSIGHTS

2024

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Preface

Dear reader,

We are excited to present the fifth edition of the social media & influencer marketing barometer (abbreviated as 'SMI Barometer' to improve readability of this report), which offers an overview of the current status of social media and influencer marketing among Belgian young adults (16 to 39 years old).

GOAL OF THE RESEARCH

This research focuses on tracking the adoption, usage, and perception of social media, influencer marketing, and podcasts. Its primary aim is to provide valuable insights for (retail) brands, offering the latest information on how Belgians aged 16 to 39 engage with branding and influencer marketing through social media platforms.

To achieve this, a representative sample of Belgians within the 16 to 39 age range was surveyed. Additionally, strategic insights into the social media branding approaches of Belgian retail brands were obtained through expert interviews. Furthermore, in-depth interviews were conducted with individuals aged 16 to 24 to gain profound insights into how this specific demographic experiences branding through social media and influencer marketing.

SURVEY SCOPE

This is the fifth edition of the SMI Barometer, and the fourth national edition. The very first edition solely focused on Flemish young people aged 16 to 24. In the 2021 edition, we extended the geographical scope to encompass Belgians aged 16 to 24. In the previous edition (2023), we extended the age range from 16 to 24 to 16 to 39-year-old Belgians, a scope which has been retained in the current edition.

CHANGES IN SURVEY

To ensure the continuity and consistency of our research, the majority of survey questions were retained in their original form. However, a few questions were optimized and updated to enhance the relevance and accuracy of our findings. More specific, the following changes were made:

1. The social media platform Twitter was replaced with X.
2. We examined in depth (brand-related) use of social media (gaining inspiration, making purchases, contacting customer service, ...) and added 'social search' as an important aspect of social media usage.
3. Building upon insights gathered in the 2023 edition, we further explored consumer perceptions of influencers, content creators and celebrities.
4. We gauged for consumers' knowledge and attitude towards virtual influencers to gain a comprehensive understanding of this emerging trend.

We hope that this fifth edition will provide valuable insights to inspire and guide you in utilizing social media and influencer marketing effectively for your (retail) brand in Belgium.

Enjoy the read!

Marijke De Veirman, Laurien Desimpelaere and Eveline Mollaert
Artevelde University of Applied Sciences
May 2024

Kristof Delhez
Innovation Manager
Comeos

Als handelsfederatie voor de handel- en dienstensector zoeken we voortdurend naar manieren om onze leden te ondersteunen en hen te helpen om te groeien in een steeds veranderende markt. Een van de uitdagingen voor onze sector, is het bereiken van consumenten en hen aan te spreken op een manier die voor hen relevant en aantrekkelijk is.

Sociale media en influencer marketing zijn in dit opzicht cruciaal. Deze kanalen bieden retailers de mogelijkheid om in contact te komen met een almaar groter wordende doelgroep.

Maar het optimaal inzetten ervan is niet altijd vanzelfsprekend. De omgeving verandert razendsnel en de trends van vandaag zijn morgen oud nieuws.

Met Arteveldehogeschool hebben we de perfecte partner gevonden om jaarlijks het landschap opnieuw in kaart te brengen. Zo houden we u op de hoogte over welke marketingtechnieken echt impact hebben, welke doelgroepen zich waar bevinden en hoe inspanningen op sociale media en via influencers ook daadwerkelijk vruchten kunnen afwerpen.

Voor het vijfde jaar op rij zijn we verheugd om de resultaten van deze studie met u te delen in dit rapport.

Ze helpen u ongetwijfeld uw marketingstrategie te optimaliseren en de consumenten op een relevante en impactvolle manier te bereiken.

Daarnaast gebruiken we de inzichten uit deze studie om samen beleid te voeren in zowel België als Europa.. Hoe kunnen we zorgen voor meer transparantie en duidelijke regelgeving op deze sociale kanalen? De bedrijfswereld, politieke stakeholders en retailers staan hierin dan ook centraal.

We zijn ervan overtuigd dat de resultaten van deze studie van onschatbare waarde zullen zijn voor onze leden en voor de bredere (retail)sector.

Kristof Delhez, Innovation Manager bij Comeos

ENG

Kristof Delhez
Innovation Manager
Comeos

As a federation for the commerce and service sector, we are constantly searching for ways to support our members and help them grow in an ever-changing market. One of the challenges for our sector is reaching consumers and engaging them in a way that is relevant and attractive to them.

Social media and influencer marketing are crucial in this respect. These channels offer retailers the opportunity to connect with an increasingly broad audience. However, optimizing their use is not always straightforward. The landscape changes rapidly, and today's trends may be old news tomorrow.

With Arteveldehogeschool, we have found the perfect partner to annually remap the landscape. This allows us to keep you informed about which marketing techniques truly make an impact, where different target groups are located, and how efforts on social media and through influencers can indeed bear fruit.

For the fifth consecutive year, we are pleased to share the results of this study with you in this report. They will undoubtedly help you optimize your marketing strategy and reach consumers in a relevant and impactful manner.

Additionally, we use the insights from this study to shape policy together in both Belgium and Europe. How can we ensure more transparency and clear regulations on these social channels? The business world, political stakeholders, and retailers are central in this effort.

We are convinced that the results of this study will be of invaluable worth to our members and the broader (retail) sector.

Kristof Delhez, Innovation Manager at Comeos

State Secretary for Budget and Consumer Protection

Als staatssecretaris voor Consumentenbscherming ben ik verheugd om opnieuw het voorwoord te schrijven van de SMI-barometer, waarbij we ons blijvend inzetten voor één van de meest dynamische onderwerpen van deze tijd: influencer marketing. Het thema blijft ons als beleidsmakers boeien en uitdagen.

Het is belangrijk dat we blijven vernieuwen in deze voortdurend evoluerende trend. In het verleden hebben we de eerste stappen gezet met het opstellen van richtlijnen, maar dit jaar is het onze ambitie om deze discussie naar het Europese niveau te tillen en het naadloos te integreren in de agenda van de nieuwe Europese Commissie.

Specifieke regels met betrekking tot influencers en influencer marketing ontbreken nog in Europese wetgeving, maar bepaalde bestaande wetgeving is wel van toepassing op deze sector. Op Europees niveau is er geen specifieke wetgeving over influencer marketing. De kwestie wordt geregeld op nationaal niveau in de lidstaten. Dit heeft op sommige gebieden geleid tot een overvloed aan nationale regels die elkaar soms tegenspreken. Dit roept veel vragen en onduidelijkheid op, zowel bij consumenten als binnen de wereld van influencers.

Hoe kunnen we content labelen zodat al de volgers – ongeacht het land van herkomst - het beter begrijpen? Hoe maken we gesponsorde content duidelijk te midden van de vele verschillende labels? Hoe gaan we om met de opkomst van artificiële intelligentie binnen influencer marketing? Bovendien, wat is de verantwoordelijkheid van andere spelers binnen de influencersketen?

Dit zijn slechts enkele van de vele vragen die opkomen bij het bespreken van dit onderwerp. Deze vragen vormen een complex puzzelstukje waarvan de antwoorden te vinden zijn in een brede discussie op Europees niveau. Het Belgische Voorzitterschap van de Raad van de Europese Unie, dat de eerste zes maanden van dit jaar plaatsvindt, heeft een uitgelezen kans geboden om dit onderwerp aan te kaarten. De uitdagingen binnen het domein van influencer marketing was dan ook één van de prioriteiten van de informele bijeenkomst inzake consumentenbescherming, die alle ministers van consumentenbescherming van de verschillende lidstaten verzamelde. Uit de conclusies blijkt één ding duidelijk: het belang van een uniforme aanpak om een gelijk speelveld te creëren voor influencers uit alle lidstaten, waarbij de verwarring en ambiguïteit die consumenten en bedrijven ervaren wordt aangepakt. Gezien verschillende lidstaten aanbevelingen hebben gepubliceerd over het labelen van commerciële inhoud, kan worden geconcludeerd dat er behoefte is aan een duidelijke uniforme EU-aanpak over hoe reclameboodschappen moeten worden gelabeld met een focus op de bescherming van de jongeren.

De komende maanden zal er hierover nauw worden samengewerkt met het volgende voorzitterschap van de Raad van de EU. In dit kader moeten we influencers en de hele keten blijven steunen als waardevolle spelers in de moderne economie. Hun rol en impact mag niet over het hoofd worden gezien.

Met hun voortdurende inspanningen om trends te analyseren, dragen de Arteveldehogeschool en Comeos bij aan ons begrip van de veranderende consumentenmarkt. Ik wil graag mijn oprechte dank en felicitaties uitspreken voor hun waardevolle bijdrage die ons in staat stelt om beter in te spelen op de behoeften van consumenten en om de bescherming van consumentenrechten verder te versterken.

Staatssecretaris voor Consumentenbescherming

Junior Malela
Social media strategist

The fifth edition of the SMI Barometer is here, and it's full of surprising insights! With new channels and features being tested all the time, it's important to stay up-to-date with the latest information on social media and influencer within the Belgian population. This year, we'll be taking a closer look at "social search," so keep an eye out for our take on that.

In addition, we'll explore the differences in social media use between the French and Dutch-speaking parts of Belgium.

Get ready to discover this and many more in the next edition of the SMI Barometer – the best platform to learn about all the latest trends in social media and influencer marketing.



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Social media & influencer marketing **Barometer 2024**

10 key insights

1. Belgians are avid users of social media and messaging platforms.

Among Belgians aged 16 to 39, Instagram stands out as the most popular social media platform, with 69,6% using it at least daily. WhatsApp follows closely behind at 69,4%. Facebook (67,1% daily use), Messenger (59,1% daily use), and YouTube (58,1% daily use) complete the top five. On Instagram, frequent users predominantly use the Instagram feed (79,8% daily use) and Instagram stories (74,8% daily use). The popularity of Instagram reels has increased to 60,2% among daily users, up from 54,3% in 2023. Additionally, it's noteworthy that Instagram serves as a messaging platform, especially among younger demographics (66,1% daily use among 16-24-year-olds).

YouTube emerges as the most widely used platform overall, with 92% of Belgians using it at least monthly, followed by WhatsApp (90,5%) Facebook (86,6%), Messenger (84,3%) and Instagram (83,8%). While most mainstream social media platforms experience a decline in usage, the opposite is true for TikTok.

2. Instagram remains the leading social media platform among Belgian young people (16-24 y.o.), while TikTok gains momentum.

With a significant 94,2% of young people utilizing it and 81,4% engaging with it daily, Instagram maintains its dominance among 16-24-year-olds. However, this marks a 5,2% decrease compared to 2023. TikTok has emerged as the second most popular platform among Belgian young people with 70,4% using it daily, closely followed by Snapchat (69,6% daily use; -4,7% compared to 2023). Despite a slight decline in daily users for YouTube (-2,4%), it remains the top platform among young people in terms of monthly users (94,9%). Facebook continues its downward trend (-6,2%), yet maintains a usage rate of 77,3% among 16-24-year-olds on a monthly basis.

Among 16-18-year-olds TikTok (79,1% daily usage) and Snapchat (78%) exhibit notably higher daily usage rates compared to older demographics, challenging Instagram's position as the dominant platform (82,8% daily usage). 66,9% of the 16-18-year-olds open Snapchat multiple times a day and 63,1% uses TikTok multiple times a day.

Compared to young males, young females use mainstream social media more intensely, except for YouTube. 89,2% of the female young people use Instagram daily, followed by TikTok (77,2%) and Snapchat (72,6%). YouTube is the most popular daily used social media platform among 16–24-year-old males (77,2% daily usage), while only 51,6% of the 16–24-year-old females use it daily. Other popular platforms among young males are Instagram (74,4% daily usage), Snapchat (67,5% daily use) and TikTok (64% daily usage).

3. Facebook retains dominance among Belgian adults (25+), messaging apps are important.

Among individuals aged 25 and older (up to 39), Facebook remains the leader in daily social media usage, with 77,3% engaging with the platform daily. Instagram follows behind with a daily usage rate of 63,3%. While YouTube ranks lower in daily usage, it emerges as the second most important platform after Facebook when looking at monthly use (90,5%). Among 25-year-olds, there is a higher percentage of women (83,6%) compared to men (71,3%) using Facebook daily. Similarly, daily usage of Instagram is higher among women (67,9%) compared to men (58,8%). Conversely, men show higher daily usage of YouTube (65,5%) compared to women (43,8%). Also, the percentage of men daily using TikTok is higher (36,2%) compared to women (26,7%).

Furthermore, messaging apps like WhatsApp and Messenger play a crucial role in communication, with high usage rates both daily and monthly. Messaging apps like WhatsApp (73,2% daily use) and Messenger (61,7% daily use) are widely used among individuals aged 25 and older.

4. There is a growing concern regarding the extent of social media usage.

Belgians are heavy social media users, although we noticed a slight decline in daily usage compared to the previous year. 69,4% of the Belgians aged 16 to 39, and even 76,4% (compared to 64,9% in 2023) among 16-24-year-olds, have taken steps to limit their social media usage. Common actions include deleting apps (28,7% of respondents) and turning off notifications (26,8% of respondents). Notably, turning off notifications is particularly popular among women, especially among 16-24-year-olds (41,4%), while men are more inclined towards deleting apps.

5. Social media are essential for brands to connect with Belgians.

Instagram emerges as the primary platform for brand interaction, particularly among 16-24-year-olds, where 70,3% follow brands on the platform. However, Facebook remains significant, especially favoured by 25-39-year-olds for brand following (56%), while 44,5% of 16-24-year-olds follow brands on TikTok.

46,2% of Belgians aged 16 to 39 claim to get to know brands or products through Instagram, rising to 56,3% among 16-24-year-olds. Next, it is also popular for searching information about brands or products (29,9%), while 24,7% claims to have clicked through to the brand's website or webshop through Instagram. TikTok, too, plays a significant role, in particular among 16-24-year-olds with 43,2% learning about brands or products and 26,3% searching for brand-related information through the platform. Facebook remains relevant, with 35,6% of Belgians aged 16 to 39 getting to know brands or products through the platform. 23,8% already clicked through to a brand's website or webshop through Facebook. 23,5% uses the platform to search brand-related information and 21,8% to contact brands or companies. YouTube also proves valuable, as 32,1% of the Belgians (16 up to 39) got to know brands or products through the platform (38,9% among 16-24-year-olds) and 24,9% searched for more information about brands or products on YouTube.

6. Advertising is inherent to social media according to young Belgians.

18,3% of the Belgian social media users aged 16 up to 39 are willing to pay for social media platforms if no advertisements are shown in return. Among 16-24-year-olds this is 17,7%. While they acknowledge the disruptive nature of ads on social media, many have grown accustomed to them as part of their online experience. Some even find certain ads tolerable or enjoyable if they align with their interests. However, this sentiment does not translate into a willingness to pay for ad-free platforms. Instead, they view ads as the "price" of accessing social media for free. Additionally, the presence of ad blockers further reduces exposure to ads, reflecting a preference for ad-free content without willing to pay for it.

7. Influencer marketing remains highly effective, with a growing commercial impact, particularly among young people.

74% of Belgian social media users aged 16 to 39 actively follow influencers, content creators, or celebrities, with Instagram and TikTok emerging as the primary platforms for doing so. 85,2% of the 16-24-year-olds and 68,1% aged 25 and above follow influencers, content creators, or celebrities.

Of those who follow influencers, 29,2% has purchased a product or service, 34,6% has started following a brand on social media, and 44,7% has searched for more information about a brand due to influencer endorsements in the past three months. Among 16-24-year-olds, these figures are even higher, with 33,7% purchasing a product or service, 38,5% starting to follow a brand, and 51,3% seeking more information about a brand due to influencer endorsements.

8. Virtual influencers are not yet gaining traction in Belgium.

43,4% of the Belgians aged 16 to 39 are familiar with the concept of virtual influencers, with 17,1% actively following them on social media platforms, predominantly Instagram and TikTok. There are no notable differences between young people (16-24) and +25-year-olds. Opinions are divided on the authenticity and innovativeness of brand endorsements by virtual influencers, with more skepticism among older age groups. 53,5% thinks brand endorsements from virtual influencers are lacking in authenticity. Transparent communication regarding the virtual nature of these influencers is crucial. 70,1% emphasizes the importance of transparent disclosure regarding the virtual nature of influencers, underscoring a desire for clarity.

9. Podcast advertising is promising.

More than half (54,8%) of the Belgians aged 16 to 39 listen to podcasts, mostly on Spotify. Among podcast listeners aged 16 to 39, 74,2% encounters brands while listening, with 39,1% encountering them frequently or daily. Podcasts demonstrate their commercial impact, with 34,7% of listeners seeking more information about a brand due to a podcast and 29% making a purchase as a result of podcast advertising in the past three months. 41,6% of podcast listeners have become acquainted with a product, service, or brand through podcasts in the same period, indicating their potential as a marketing channel.

10. Influencers and podcasts wield significant influence in shaping the behavior and lifestyle choices of Belgians aged 16 to 39.

71,2% of individuals who follow influencers, content creators, or celebrities online admit to being influenced to change their lifestyles and behaviour. Eating healthier consistently emerges as one of the most influenced areas, with 34,3% of respondents starting to eat more healthily due to influencer content. Additionally, 32,9% report exercising more, while 18,6% have altered their fashion style and 18,5% have become more conscious of their budget. 15,9% pays more attention to mental health, and 12,6% was motivated to seek psychological help.

Podcasts may also influence lifestyle choices, with 31,8% of listeners reporting motivation to eat healthier and 27,1% engaging in more physical activity due to podcast content. 19,6% claims that podcasts motivated them to invest or manage their budget. Notably, podcasts have sparked interest in mental health, with 17,4% expressing willingness to seek psychological help and 15,9% paying more attention to their mental well-being.

Methodology

Research question: context & terminology

What can you expect from the fourth edition of the Social Media & Influencer marketing Barometer, also known as the SMI Barometer? In this research report, we focus on the research question: 'How can (retail)brands enhance their impact on Belgian consumers aged 16 to 39 through social media and influencer marketing?'

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 following social media were included in our research (in alphabetical order):

1. BeReal*	12. X (Twitter)[1]
2. Discord	13. WhatsApp
3. Facebook	14. YouTube
4. Instagram	15. Clubhouse
5. LinkedIn	16. Signal
6. Messenger	17. Spotify
7. Pinterest	18. Strava
8. Reddit*	19. Telegram
9. Snapchat	20. Triller
10. TikTok	21. Tinder / Grindr
11. Twitch	22. OnlyFans

Unfortunately, we were unable to include 'Threads' as a new social media platform, as it was launched right after the launch of our survey. Nevertheless, the platform was included in our qualitative research.

[1] *In July 2023, Twitter changed its name in 'X'*

'Influencer' was conceptualized based on Lamarque' (2017) four parameters:

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

In line with this definition, a review of academic definitions of the concept 'influencer' identified two central characteristics to be considered an influencer: reach and impact. Reach to influencers' substantial follower base, which subsequently results in a large secondary reach through their followers. Impact refers to the influence influencers have on the decision-making of their audience, which may go beyond their commercial impact (Hudders, De Jans and De Veirman; 2020).

Influencers' large network, their content creation skills and their impact on their followers' behavior (Lamarque, 2017), resulted in brands repeatedly approaching 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).

Outline of the studies

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

ONLINE SURVEY AMONG BELGIANS

The findings and results of the Social Media & Influencer marketing Barometer are based on an online survey amongst Belgians between the age of 16 and 39. The data collection took place between November 2023 and January 2024. The vast majority of the data was collected through the online panel provider Bilendi, a small portion through own data collection.

QUALITATIVE RESEARCH AMONG BELGIAN YOUNG PEOPLE

Between February and March 2024, we conducted 29 individual online qualitative interviews with Dutch-speaking and French-speaking young people aged 16 to 24. These participants were recruited from our quantitative sample, ensuring representation across age, gender, and region (provinces). The respondents were interviewed online (via WhatsApp) to gain insights regarding their individual use and experience of social media and podcasts, branding via these platforms and influencer marketing. All respondents used WhatsApp prior to the qualitative survey.

IN-DEPTH INTERVIEWS WITH BELGIAN RETAIL BRANDS

From November 2023 to March 2024, we conducted 10 intervieuws with(digital) marketing managers representing various retail brands and organisations in depth. These brands are: **Carrefour, colora, Disney, E5, Jysk, Krëfel, MIVB, QLEVR, Topbrands** and **Wavemakers** on behalf of the Belgian mucoviscidosis association 'Mucovereniging'. Interviews were conducted via videocall and transcribed using Amberscript.

« THE INSIGHTS GAINED FROM THESE INTERVIEWS WILL BE INDICATED WITH THIS SPECIFIC LAY-OUT»

Introductory remarks about the research

WEIGHTING

To ensure a representative sample of the Belgian population aged 16 to 39, we applied weighting[1] based on census data from Statbel. This way the sample was adjusted to reflect the demographic composition of the population, based on age group, gender, and geographical region.

COMPARATIVE AND MULTIRESPONSE ANALYSES

Statistical analyses were carried out using IBM SPSS Statistics. If meaningful, we reported differences across genders, age groups and language groups (Dutch- or French-speaking). Reported differences between groups are at least significant at the ,05 level.[2] Multiple response analyses were used in case participants could opt more than one option in a survey question, resulting in more than one answer per participant.

EVOLUTION 2020 – 2024

This research initiative commenced in 2020 with a focus on Flemish individuals aged 16 to 24, expanded to encompass the entirety of Belgium in 2021, and further broadened its scope to include the 16 to 39 age group in the 2023 edition. Therefore, we examined the evolution of trends in Belgium from 2021 to 2024, focusing on age groups 16 to 24 in 2021 (N = 3263) and 2022 (N = 3291), and expanding to include the 16 to 39 age group in 2023 (N = 5663). In Flanders (16-24 y.o.), trends could be mapped since 2020 (N = 1167).

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, if the usage frequency of a social media platform increases from 20% to 30%, this represents a 10 percentage point increase. 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).

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

[2] Primarily, comparative analysis was conducted using the Mann-Whitney U Test. In certain instances, T-tests were also employed, as explicitly noted.

Online survey: sample description

AGE

The target group of this survey is Belgians between the ages of 16 and 39. The mean age of the 4516 participants is 27,8 years (SD = 6,9). As previous research shows that social media use may significantly differ across age groups, we considered differences between young people (16 – 24 years, N = 1730) and adults (25 – 39 years, N = 2786).

GENDER

63,6% females (N = 2871; $N_{16\text{-}24}$ = 1114, $N_{25\text{-}39}$ =1757) and 35,6% males (N = 1608; $N_{16\text{-}24}$ = 598, $N_{25\text{-}39}$ = 1010) participated in the online survey. 25 participants (0,6%) indicated to be genderqueer. 12 participants indicated 'other' or 'I' prefer not to share my gender' (0,2%).

GEOGRAPHIC DISTRIBUTION

54,4% of the sample was Dutch-speaking (N = 2458; $N_{16\text{-}24}$ = 945, $N_{25\text{-}39}$ = 1513); and 45,6% French-speaking (N = 2058; $N_{16\text{-}24}$ = 785, $N_{25\text{-}39}$ = 1273). Figure 1 shows the distribution of participants across the regions in Belgium. Table 1 provides more details about the regional and age distribution..

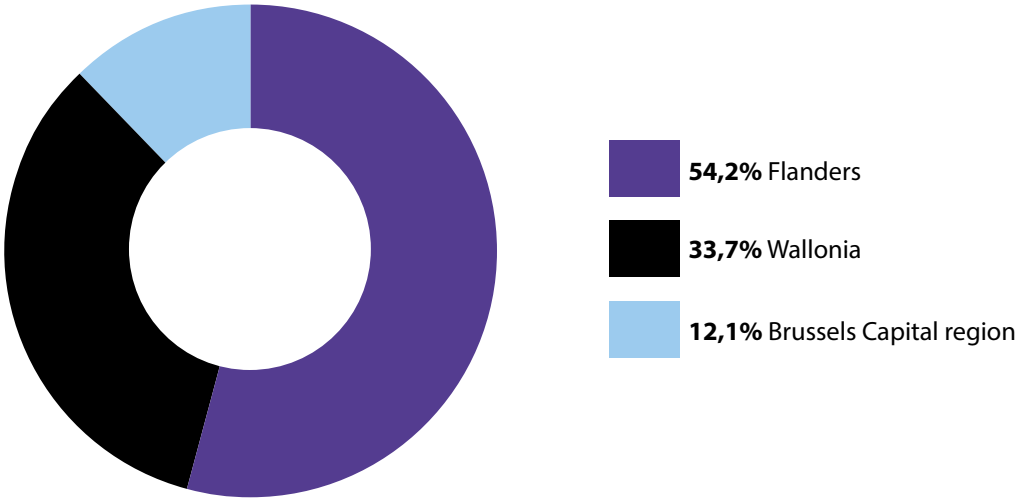


Figure 1: Distribution of participants across region (N = 5663)

	Flanders	Wallonia	Brussels CR	Total
16-24 years	950	585	195	1730
25–39 years	1499	937	350	2786
Total	**2449**	**1522**	**545**	**4516**

Table 1: Distribution of participants across region and age group

EDUCATION AND EMPLOYMENT

At the time of the survey, 55,8% worked at least part-time, either in paid employment (52,3%) or self-employed (3,5%). 31,5% (N = 1422) of the participants were enrolled at least part-time in a school. Table 2 provides an overview of the which studies these participants were enrolled in at the time of survey. Other participants (N= 3094) were asked to indicate their level of education, which is presented in table 3.

General Secondary Education	19,4%
Technical Secondary Education	10,9%
Vocational Secondary Education	7,1%
Art Secondary Education	1,2%
Bachelor's studies or short-cycle tertiary education	42,2%
Master's studies	16,7%
Other	2,5%

Table 2: Overview education of participants enrolled at least part-time in a school (N = 1422)

Primary Education	6,9%
Lower Secondary Education	4,7%
Upper Secondary Education	32,2%
Short-cycle tertiary education, Bachelor's level or equivalentn	34,7%
Bachelor's studies or short-cycle tertiary education	42,2%
Master's or doctoral level	25,5%
Unknown	0,7%

Table 3: Overview level of education participants (n = 3094)

Social Media Use

KEY INSIGHTS

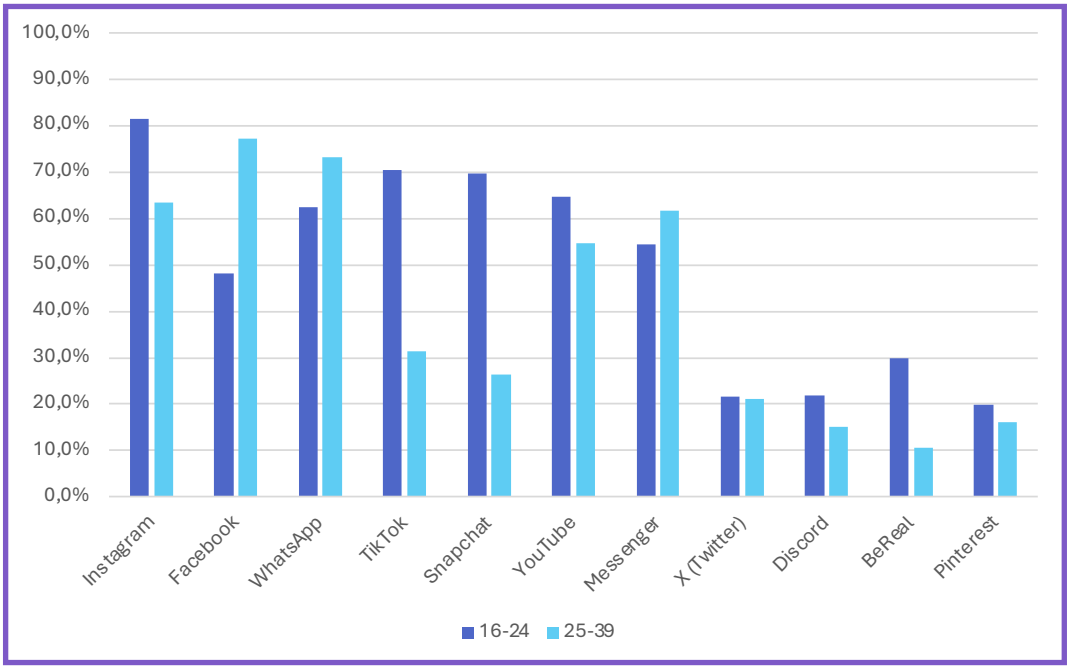
- **Instagram remains the top choice for daily social media use among young people, with a slight decrease in daily use compared to the previous year. TikTok and Snapchat closely follow Instagram in terms of daily usage among young adults, with TikTok showing significant growth.**
- **YouTube emerges as the most widespread platform both among young people and +25-year-olds.**
- **Facebook maintains its dominance among individuals aged 25 and above, with high daily and monthly usage rates.**
- **WhatsApp and Messenger are widely used across all age groups for daily communication.**
- **Gender differences exist in social media usage patterns, with women showing higher daily usage percentages on platforms like Instagram, TikTok, and Snapchat, while men prefer platforms like YouTube and X (Twitter).**
- **Dutch- and French-speaking Belgians show similar preferences for mainstream social media platforms, but differences emerge in the usage of messaging apps and video platforms.**
- **Actions to limit social media usage are common among participants, with deleting apps and turning off notifications being the most popular methods, especially among women.**

ACTIVE SOCIAL MEDIA USE

Instagram remains the most frequently used social media platform among young people, Facebook maintains its dominance among +25-year-olds

Instagram remains the most commonly utilized social media platform, with 81,8% of young people using it daily and 94,2% monthly. This is a small decrease compared to last year (-5,3%). TikTok and Snapchat follow closely behind, with daily usage rates of 70,3% and 69,6% respectively. While TikTok is now the second most frequently used social media platform on a daily basis, Snapchat remains more commonly used on a monthly basis (84,2%) compared to TikTok (80,4%). Looking into monthly use, YouTube is the most widespread platform among young people (94,5%), followed by Instagram at 94,2%. 77,3% of young people still uses Facebook on a monthly basis. Furthermore, 59,6% of the 16-24-year-olds uses Pinterest on a monthly basis.

Among individuals aged 25 and above, Facebook maintains its dominance with a daily usage rate of 77,3% (similar to last year) and 91,6% monthly, followed by WhatsApp at 73,2% (91,3% monthly), Instagram at 63,3% (78,1% monthly) and Messenger at 65,4% (87,7% monthly). Similar to the 16 to 24-year-olds, YouTube seems to be very widespread among +25-year-olds as well, with a monthly usage rate of 90,5%.



| **Figure 2**: Daily social media use according to age group (in %, N = 4516)

The following table provides all details on the social media usage patterns among young adults (16-24) and those aged 25 and above. When comparing social media usage frequency between 16-24 and 25-39-year-olds, it becomes clear that the frequency of use significantly differs between genders across all platforms, except for Reddit.

	16-24		25-39		Overall	
	Daily Use	Monthly Use	Daily Use	Monthly Use	Daily Use	Monthly Use
Facebook	48,13%	77,33%	77,30%	91,59%	67,12%	86,60%
Instagram	81,38%	94,24%	63,34%	78,15%	69,65%	83,76%
TikTok	70,36%	80,43%	31,42%	47,38%	45,03%	58,94%
Snapchat	69,60%	84,17%	26,39%	43,21%	28,25%	57,53%
X (Twitter)	21,74%	37,16%	21,06%	37,16%	21,29%	39,95%
YouTube	64,64%	94,87%	54,58%	90,51%	58,10%	92,03%
Pinterest	19,76%	59,59%	16,08%	50,61%	17,36%	53,75%
LinkedIn	9,94%	30,02%	17,98%	48,38%	15,18%	41,97%
Twitch	13,36%	35,78%	13,27%	26,72%	13,29%	29,88%
Discord	21,86%	45,50%	15,12%	29,96%	17,48%	35,40%
WhatsApp	62,44%	88,98%	73,20%	91,28%	69,45%	90,48%
Messenger	54,37%	77,82%	61,71%	87,75%	59,14%	84,27%
Signal	7,16%	16,40%	9,50%	19,64%	8,67%	18,50%
Telegram	10,96%	27,25%	14,77%	27,43%	13,44%	27,38%
Strava	8,81%	26,62%	10,11%	26,59%	9,66%	26,62%
Clubhouse	5,51%	12,61%	6,95%	14,54%	6,47%	13,92%
Triller	6,21%	12,55%	7,35%	14,71%	6,96%	13,96%
Tinder/Grindr	5,95%	16,15%	8,61%	19,30%	7,66%	18,19%
OnlyFans	4,62%	11,40%	6,84%	14,74%	6,07%	13,57%
BeReal	29,77%	44,59%	10,49%	18,66%	17,24%	27,73%
Reddit	9,32%	27,00%	10,55%	25,20%	10,12%	25,83%

Table 4: Daily and monthly social media use per platform among Belgians aged 16 to 39

The graph below shows that the use of Instagram, Snapchat and TikTok decreases as **age** increases. The opposite is true for Facebook.

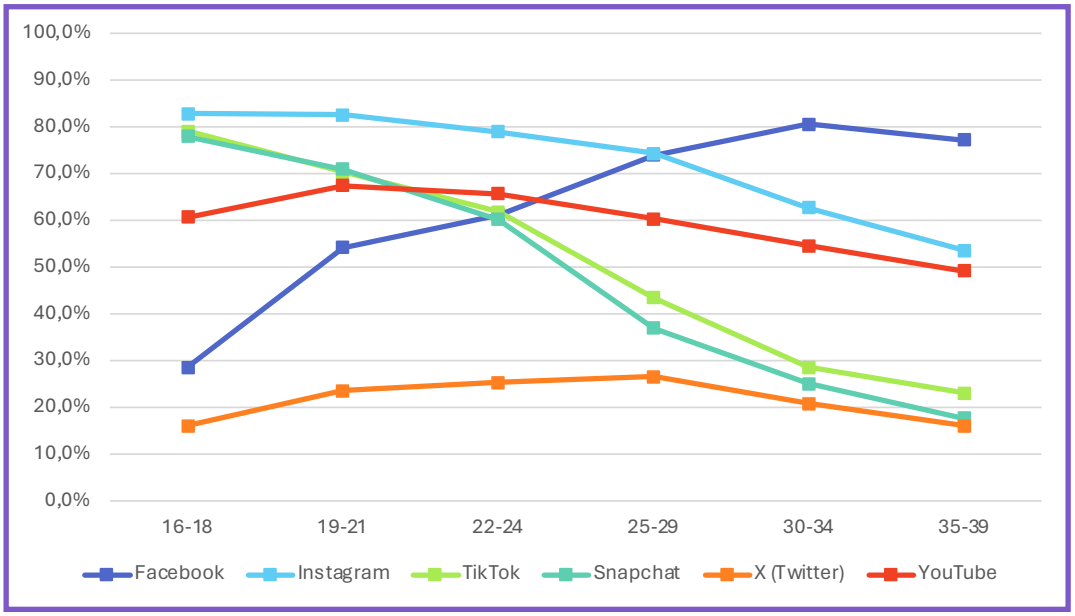


Figure 3: Daily social media use across age groups (in %; N=4516)

The following graph provides insight into differences in daily social media use between men and women. When comparing social media usage frequency between **men and women**, it becomes clear that the frequency of use significantly differs between genders across all platforms, except for TikTok.

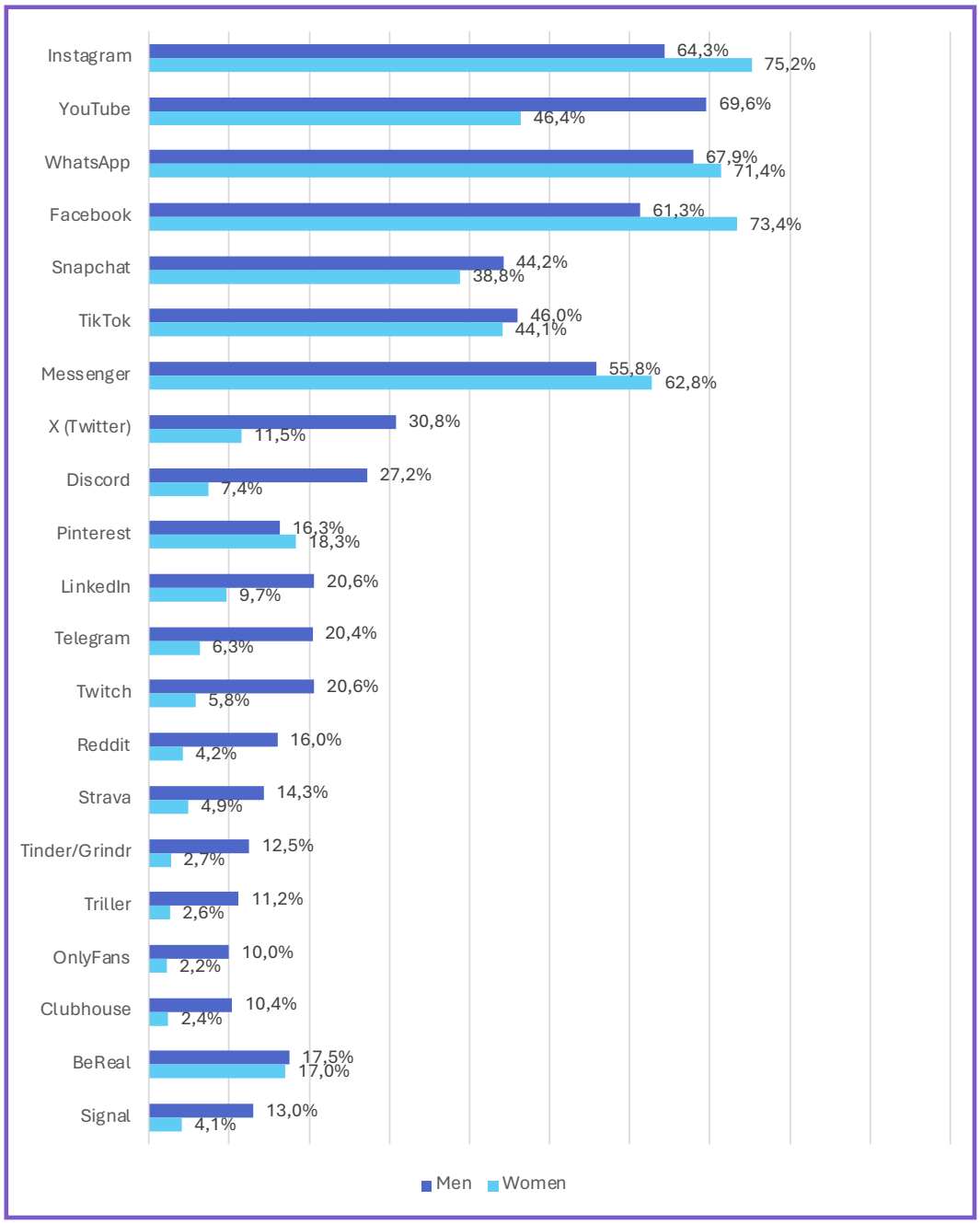


Figure 4: Daily social media use according to gender (in %; N = 4516)

The top 5 daily used social media platforms looks different among 16-24 year-old men and women, while the differences are less pronounced among individuals aged 25 and older. Furthermore, it appears that females use mainstream social media more intensely, except for YouTube, which is the most popular daily used social media platform among 16-24 year-old males, while it is only on the 6th place among 16-24 year-old females (51,6%). Niche platforms such as, Twitch, Discord, Signal, Telegram, Clubhouse, Triller, Tinder/Grindr, OnlyFans and Reddit are more frequently used among males, except for Pinterest among 16-24 year-old females of which 25,8% uses the platform on a daily basis and 76,8% on a monthly basis.

16-24		25-39	
Male	Female	Male	Female
YouTube (77.2%)	Instagram (89.2%)	Facebook (71.3%)	Facebook (83.6%)
Instagram (74.4%)	TikTok (77.2%)	WhatsApp (71%)	WhatsApp (75.5%)
Snapchat (67.5%)	Snapchat (72.6%)	YouTube (65.5%)	Instagram (67.9%)
TikTok (64.0%)	WhatsApp (63.6%)	Messenger (59.6%)	Messenger (64%)
WhatsApp (62.1%)	Messenger (60.5%)	Instagram (58.8%)	YouTube (43.8%)

Table 5: Top 5 daily used social media platform according to age-group and gender

When comparing social media usage frequency between **Dutch- and French-speaking Belgians**, it appears that the frequency of use significantly varies across all platforms, with the exception of Instagram, Pinterest, LinkedIn, Clubhouse, Triller, Tinder/Grindr, and OnlyFans. In the following graph we have plotted the daily social media use according to language group.

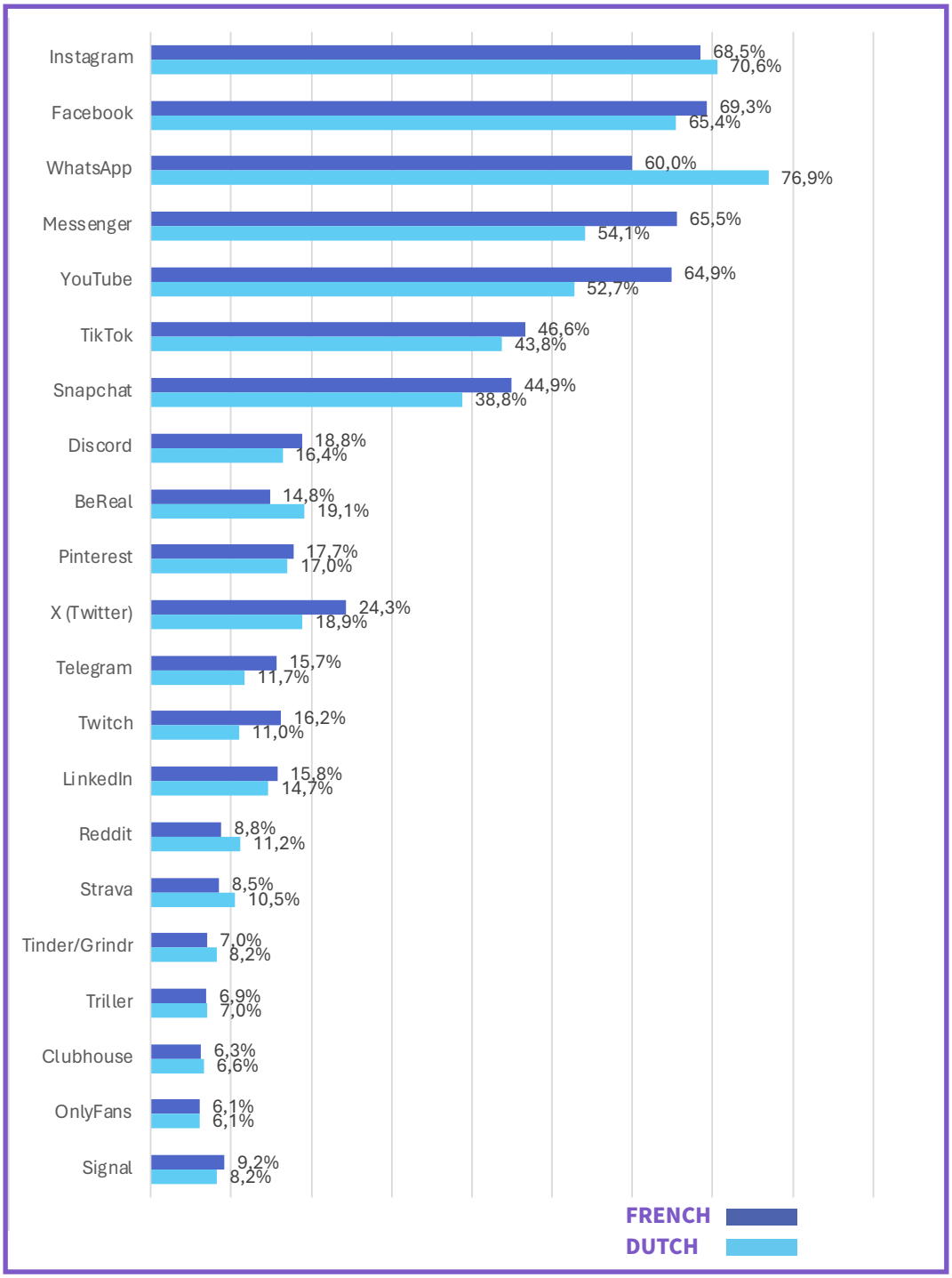


Figure 5: Daily social media use among 16–39-year-olds according to language (in %; N = 4516)

ZOOMING IN ON THE DIFFERENT FUNCTIONALITIES OF FACEBOOK, INSTAGRAM AND YOUTUBE

We examined the usage patterns of individuals who regularly engage with Instagram, Facebook, and YouTube (at least weekly). On **Facebook**, users still primarily engage with the Facebook *feed* (70% daily use; 16-24: 63,5%; 25-39: 72,6%). Facebook *groups* are also quite commonly utilized by regular users (40,6% daily use; 16-24: 35,6%; 25-39: 42,7%), in particular on a monthly basis. Additionally, *stories* and *reels* are viewed daily among about one third of frequent users (stories: 33,6%; 16-24: 26,9%; 25-39: 36,4%; reels: 31,3%; 16-24: 26,2%; 25-39: 33,4%). The *marketplac*e feature continues to maintain its popularity with 23,9% of the frequent users utilizing it daily (16-24: 22,5%; 25-39: 24,5%) and 62,4% monthly (16-24: 56,3%; 25-39: 64,9%). Facebook *events* is consulted daily by 34% of frequent users (16-24: 15,8%; 25-39: 16,3%), 57,3% uses this function at least monthly. Currently, Facebook *rooms* hasn't gained significant traction, with only 15,3% (16-24: 13,1%; 25-39: 16,1%) of regular Facebook users utilizing it daily and about one third monthly.

« FACEBOOK, J'Y VAIS PRINCIPALEMENT POUR ORGANISER ET PARTICIPER À DES ÉVÉNEMENTS. CRÉER DES GROUPES. COMMUNIQUER AVEC MA FAMILLE ET MES PROCHES SUR MESSENGER. ET PARFOIS POUR SCROLLER ET VOIR ÉGALEMENT DE NOUVELLES INFORMATIONS.» (***WOMAN***, 21 Y.O.)

« OUI PLUSIEURS, DES GROUPES POUR MES ÉTUDES OU DES GROUPES SUR LOUVAIN-LA-NEUVE PAR EXEMPLE, D'ENTRAIDE POUR DES QUESTIONS PRATIQUES OU AUTRES.» (***WOMAN***, 22 Y.O.)

« FACEBOOK GEBRUIK IK OM TE WETEN TE KOMEN WELKE FUIVEN ER ZIJN.» (***WOMAN***, 16 Y.O.)

« FACEBOOK (VOOR SCHOOLEVENTS) EN INSTA (VOOR FESTIVALS): IK VOLG DE GROEPEN EN ACCOUNTS DIE DIT POSTEN UIT INTERESSE.» (***WOMAN***, 20 Y.O.)

On **Instagram**, frequent users predominantly use the Instagram *feed* (79,8%; $_{16\text{-}24}$: 81,9%; $_{25\text{-}39}$: 78,4%) and Instagram *stories* (74,8%; 16-24: 78,1%; 25-39: 72,6%) on a daily basis. The popularity of Instagram *reels* has surged to 60,2% (16-24: 63,1%; 25-39: 58,3%) among daily users, up from 54,3% in 2023. Additionally, it's noteworthy that Instagram serves as a primary *messaging* platform (53,7% daily use), especially among younger demographics. Their daily usage of the messaging function has increased to 66,1% (+3,7%). Among users aged 25 and above, there's a significant rise as well, with 45,5% using the direct messaging function daily, indicating a 6,3% increase.

« INSTAGRAM JE PARTAGE EN GÉNÉRAL MES STORY MON QUOTIDIEN MES VOYAGES ET JE VOIS AUSSI CEUX DE MES AMIS OU DE CÉLÉBRITÉS QUI M'INSPIRENT. » (***WOMAN***, 24 Y.O.)

« J'UTILISE INSTAGRAM LE PLUS SOUVENT CAR JE TROUVE QUE C'EST L'ENDROIT LE PLUS FACILE D'ENVOYER DES MES-SAGES ET DE PUBLIER DES PHOTOS. DE PLUS INSTAGRAM A QUELQUES CARACTÉRISTIQUES QUE LES AUTRES RÉSEAUX SOCIAUX N'ONT PAS COMME, PAR EXEMPLE, LES NOTES QUI RESTENT PENDANT 24H OU ON PEUT PARTAGER UN PETIT MESSAGE OU UNE CHANSON QU'ON AIME BIEN. » (***WOMAN***, 19 Y.O.)

On **YouTube**, most frequent users watch classic YouTube *videos* (66,5%; 16-24: 71,9%; 25-39: 63,3%) rather than *shorts* (35,9%; 16-24: 34,1%; 25-39: 37%) on a daily basis.

	16-24		25-39		All ages	
	Daily	Monthly	Daily	Monthly	Daily	Monthly
Facebook (N = 3616; 16-24: 1051; 25-39: 2566)						
Feed	63,5%	88,1%	72,6%	89,4%	70,0%	89,0%
Stories	26,9%	57,2%	36,4%	69,6%	33,6%	66,0%
Reels	26,2%	56,5%	33,4%	63,2%	31,3%	61,3%
Groups	35,6%	74,2%	42,7%	80,2%	40,6%	78,5%
Rooms	13,2%	32,8%	16,1%	32,5%	15,3%	32,6%
Events	15,8%	57,3%	16,3%	57,3%	16,1%	57,3%
Marketplace	22,5%	56,3%	24,5%	64,9%	23,9%	62,4%
Instagram (N = 3583; 16-24: 1429; 25-39: 2155)						
Feed	81,9%	96,1%	78,4%	93,9%	79,8%	94,8%
Stories	78,1%	96,0%	72,6%	93,1%	74,8%	94,3%
Reels	63,1%	88,9%	58,3%	84,8%	60,2%	86,4%
DM	66,1%	92,5%	45,5%	82,6%	53,7%	86,6%
YouTube (N = 3581; 16-24: 1337; 25-39: 2243)						
Videos	71,9%	96,9%	63,3%	93,3%	66,5%	94,7%
Shorts	34,1%	69,2%	37%	68,2%	35,9%	68,6%

Table 6: % of frequent users utilizing specific functionalities of Facebook, Instagram and YouTube

REDUCING SOCIAL MEDIA USE

69,4% of the participants has ever taken one or more actions to limit their social media usage. Among them, 76,4% of young people (16-24) and 65,6% of those aged 25 and above have taken steps to limit their social media usage. There isn't a significant difference between men and women overall. However, among 16-24-year-olds, the percentage is slightly higher for women (78,3% vs. 75%), while among those aged 25 and above, it's the opposite (men 67%, women 64%). The most commonly cited actions include deleting apps (28,7% of respondents) and turning off notifications (26,8% of respondents). These percentages tend to be slightly higher among women. The most popular action among women is turning off notifications (notably high among 16-24-year-olds: 41,4%), while among men, it's deleting apps. There is no significant difference between 16-24-year-olds and 25-39-year-olds in preferred actions to limit social media usage.

From our conversations with youth, we noticed conscious effort to manage and limit their screen time on social media platforms, particularly TikTok, due to concerns about excessive usage and its impact on productivity and personal interests.

«J'AI SUPPRIMÉ LES NOTIFICATIONS SUR FACEBOOK POUR DIMINUER MON TEMPS SUR LES RÉSEAUX SOCIAUX (ET ÇA FONCTIONNE !) SUR INSTAGRAM, PINTEREST ET STRAVA AUSSI ET TIKTOK.» (***WOMAN***, 22 Y.O.)

«OUI J'AI UN TEMPS D'ÉCRAN LIMITÉ SUR CERTAINES APPLICATIONS. ET ÇA M'ENVOIE UNE NOTIFICATION QUAND JE DÉPASSE CE TEMPS.» (***MAN***, 23 Y.O.)

«(PARLANT DE TIKTOK) J›Y PASSAIS TROP DE TEMPS ET EN FAIT ÇA NE M›INTÉRESSAIT PAS CAR J›AIME BIEN POUVOIR LIKER DES PHOTOS ET CE N›EST PAS CE QU›ON RETROUVE SUR LA PLATEFORME. » (***WOMAN***, 21 Y.O.)

«OUI POUR TIKTOK CAR EN RÉALITÉ C'EST UNE VRAIE PLAIE, JE PASSE TROP DE TEMPS DESSUS ET PARCE QUE JE VOIS DES CHOSES COURTES ET IMMÉDIATEMENT, TOUT CE QUI EST LONG À FAIRE NE ME DONNE PLUS ENVIE DE LES FAIRE CAR C'EST TROP LONG. DONC JE ME SUIS MIS 30 MIN MAX SUR TIKTOK. MON IPHONE ME PROPOSE D'EN METTRE UN. IL SUFFIT D'ALLER DANS LES RÉGLAGES ET ENSUITE DE FAIRE LES MANIPULATIONS NÉCESSAIRES. » (*MAN*, 16 Y.O.)

Have you ever taken actions to limit your social media usage?							
	16-24			25-39			All
	Men	Women	Total	Men	Women	Total	Total
Yes, by deleting apps from my device.	34,8%	32,3%	33,6%	25,8%	26,5%	26,1%	28,7%
Yes, by blocking or deleting my account on certain social media.	17,6%	13,9%	15,7%	17,7%	12,7%	15,2%	15,4%
Yes, by setting timers, apps, or screen time limits.	20,3%	26,3%	23,2%	16,5%	13,5%	15,1%	17,9%
Yes, by taking a period of 'digital detox'.	13,8%	15,7%	14,5%	19,4%	14,1%	16,9%	16,1%
Yes, by limiting the number of accounts I follow.	16,7%	19,7%	18,2%	14,7%	16,7%	15,7%	16,6%
Yes, by turning off my device or placing it out of my reach.	18,8%	29,3%	23,8%	13,5%	17,1%	15,5%	18,4%
Yes, by turning off my notifications.	23,8%	41,4%	32,5%	19,2%	28,2%	23,7%	26,8%
Yes, in another way.	6,2%	4,1%	5,1%	2,7%	2,5%	2,6%	3,5%
No	25,0%	21,7%	23,5%	33,0%	36,0%	34,3%	30,6%

Table 7: Actions taken to limit social media usage (multiple response excl. 'No'; in %; N = 2252)
* This question was posed to only half of the sample to limit the duration of the questionnaire.

Focus on youth

INSTAGRAM, TIKTOK, AND SNAPCHAT ARE BELGIAN YOUNG PEOPLE'S DAILY SOCIAL MEDIA FAVOURITES, YOUTUBE DOMINATES MONTHLY USAGE

The following graph provides an overview of the social media use of Belgians between 16 and 24 years (in %). By comparing daily and monthly use, we gain insights into which platforms are use most intensively and which platforms are most widespread. Specific percentages can be found in table 4.

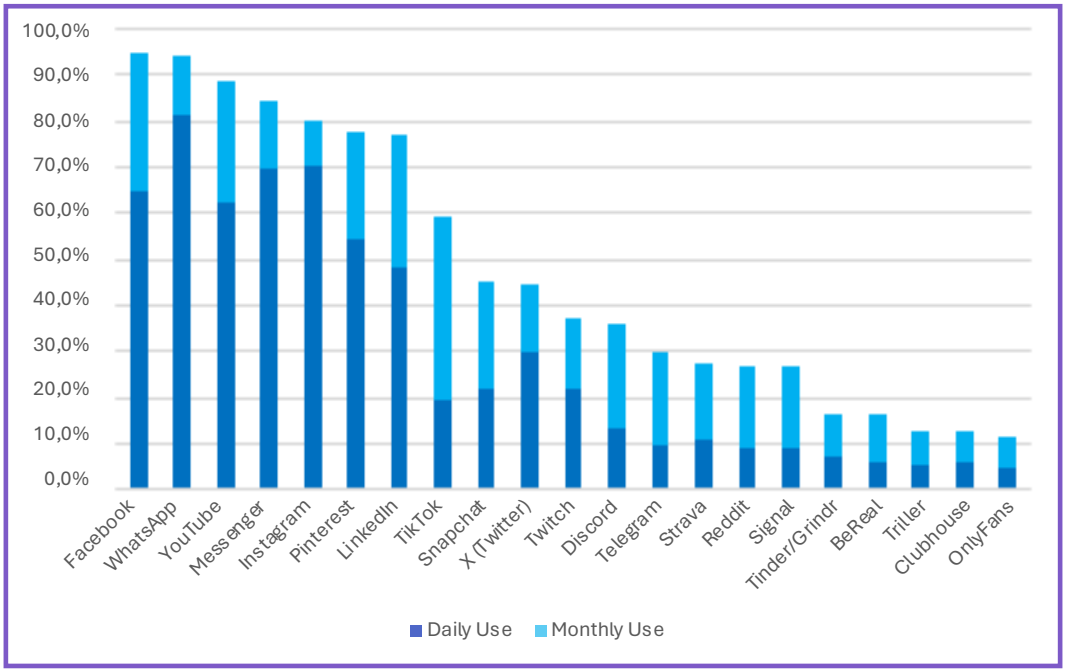


Figure 6: Daily vs. monthly social media use among Belgian youth (in %; N = 1730)

Instagram remains the predominant social media platform among Belgian young people, with 94,2% of them utilizing it, and 81,4% engaging with it daily, marking a 5,2% decrease compared to last year. Previously, Snapchat held the position as the second most popular platform based on daily usage, but now TikTok has caught up, with 70,4% of young people using it daily compared to 69,6% (-4,3%) for Snapchat. After a significant surge in 2021, TikTok's growth has stabilized, with only a 1,3% increase in daily use compared to the previous year, solidifying its status as a mainstream platform among young people. While YouTube has experienced a slight decline for the third consecutive year (-2,4%) in daily users, it remains the top platform among young people in terms of monthly users. Facebook's decline persists (-6,2%), yet it still boasts a usage rate of 77,3% among 16-24-year-olds on at least a monthly basis. The change from Twitter to X does not appear to have benefited its popularity among young people, as daily usage has decreased by 4% to 21.7%. It seems that the daily usage of mainstream social media platforms decreased a little, except TikTok (+1,3%) and Pinterest (+1,5%).

A new addition to the top 10 platforms among Belgian young people last year was BeReal. While 35,6% of Belgian young people used it daily last year, today's figure stands at 29,8%, indicating a slight decline in daily usage. The new platform 'Threads' was excluded from the survey due to its launch occurring after the questionnaire was distributed. However, we did account for this platform in our qualitative research.

The young people we spoke with aren't very enthusiastic about Threads. Participants felt that they already devote enough time to established social media platforms and therefore didn't feel the need for an extra platform. The lack of appeal among young adults could be attributed to the absence of unique features or experiences not already present in their current social media repertoire.

«… J'AI JUSTE L'IMPRESSION QUE C'EST UNE COPIE DE X ET ÇA NE ME DONNE PAS ENVIE D'ESSAYER.» (*WOMAN*, 22 Y.O.)

«OUI OUI J'AI VU SUR INSTAGRAM MAIS JE TROUVE ÇA EMBÊTANT QU'IL FAILLE INSTALLER UNE NOUVELLE APPLICATION POUR Y ACCÉDER ÇA DEVRAIT JUSTE ÊTRE UNE FONCTIONNALITÉ D'INSTAGRAM.» (*WOMAN*, 24 Y.O.)

«OUI JE VOIS DE PLUS EN PLUS DE COPAINS QUI Y SONT, MAIS HONNÊTEMENT JE NE PENSE PAS QUE JE VAIS TÉLÉCHARGER D'AUTRES RÉSEAUX SOCIAUX QUE CEUX QUE J'AI ACTUELLEMENT CAR JE TROUVE QUE JE PASSE DÉJÀ TROP DE TEMPS SUR CEUX-LÀ HAHA» (***WOMAN***, 21 Y.O.)

«JE LE CONSULTE. JE NE POSTE PRESQUE PAS. JE L'AI INSTALLÉ PAR CURIOSITÉ ET AUSSI EN ESPÉRANT TROUVER LE MÊME RÉSEAU SOCIAL QUE X MAIS EN PLUS BIENVEILLANT.» (***WOMAN***, 21 Y.O.)

The following graphs show the evolution in % of daily users of the main social media platforms in Belgium (4-year evolution) and Flanders (5-year evolution).

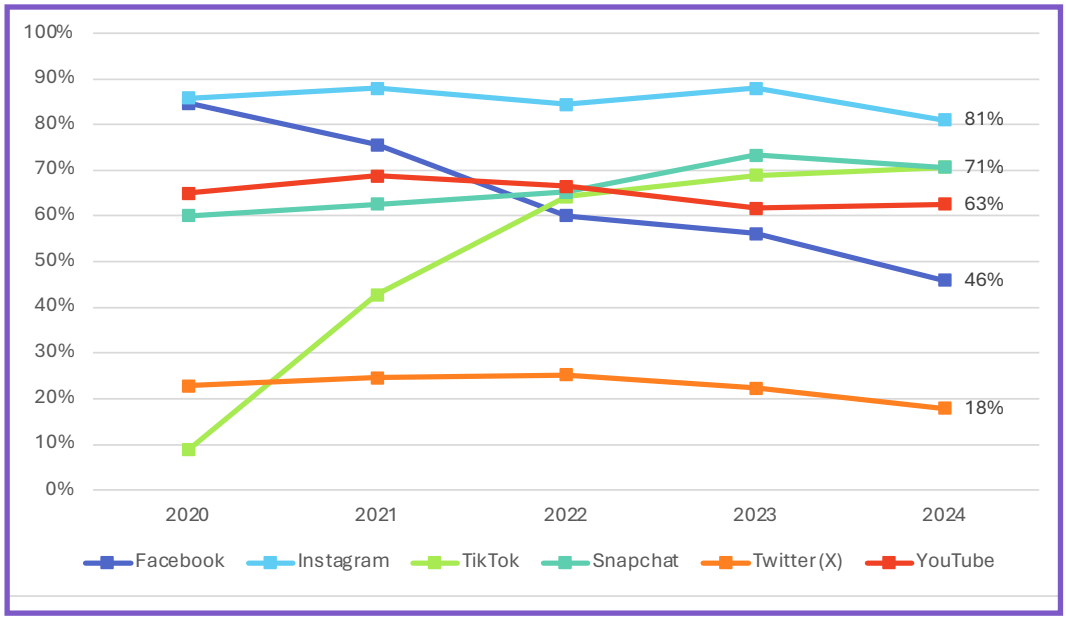


Figure 7: Evolution of social media use among Flemish young people (16 – 24 years; expressed in % of young people that uses the channel (almost)daily or more frequently)

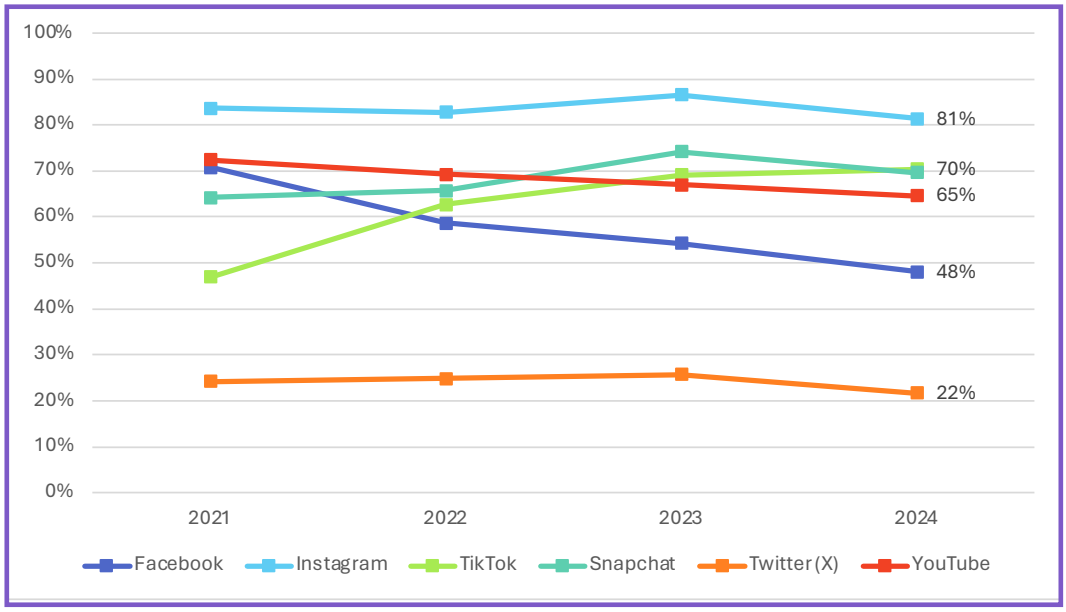


Figure 8: Evolution of social media use among Belgian young people (16 – 24 years; expressed in % of young people that uses the channel (almost)daily or more frequently)

YOUTUBE DOMINATES DAILY USE FOR MALE YOUTH, INSTAGRAM LEADS AMONG FEMALES

The top 3 daily used social media channels among male young people are YouTube (77,2%; -2,1%), Instagram (74,4%; -10,6%) and Snapchat (67,5%; -6,6%). TikTok is closely behind with 64% daily users. Among female youth, the top 3 consists of Instagram (89,2%), Snapchat (72,6%; -2,5%) and TikTok (77,2%; +4,4%).

Women tend to have higher daily usage percentages on platforms like Instagram, TikTok, Snapchat, and Messenger, while men show higher daily usage percentages on platforms like YouTube. The usage of other platforms varies between men and women.

The graph below provides more details on differences daily social media use between both groups.

A few differences stand out:

- Facebook, Instagram, TikTok, Snapchat, Pinterest, Messenger and BeReal are more frequently used by females.
- YouTube and X (Twitter) are more frequently used by males.
- There is no significant difference in usage pattern for WhatsApp between male and female youth.
- Niche platforms such as Twitch, Discord, Signal, Telegram, Clubhouse, Triller, Tinder/Grindr, OnlyFans, Reddit attract more males than females. Pinterest is the only niche platform that attracts more females.

«PINTEREST QUE J'UTILISE PARCE QUE JE TROUVE QUE L'APPLICATION DONNE TOUJOURS DES MEILLEURS RÉSULTATS QUE LES PHOTOS SUR GOOGLE. POUR DES MOODBOARDS J'UTILISERAI PINTEREST AUSSI MAIS PERSONNELLEMENT C'EST SURTOUT POUR TROUVER DES PHOTOS ET IDÉES À MON GOÛT.» (***WOMAN***, 19 Y.O.)

«REDDIT VOOR ONTSPANNING, BEKIJKEN VAN MEMES, FOTOGRAFIE EN DISCUSSIES. OOK GEBRUIK IK REDDIT OM DINGEN OP TE ZOEKEN OVER VARIËRENDE ONDERWERPEN ZOALS PROGRAMMEERCODE ETC.»(***MAN***, 19 Y.O.)

The graph below provides an overview of daily use of different social media across male and female young people.

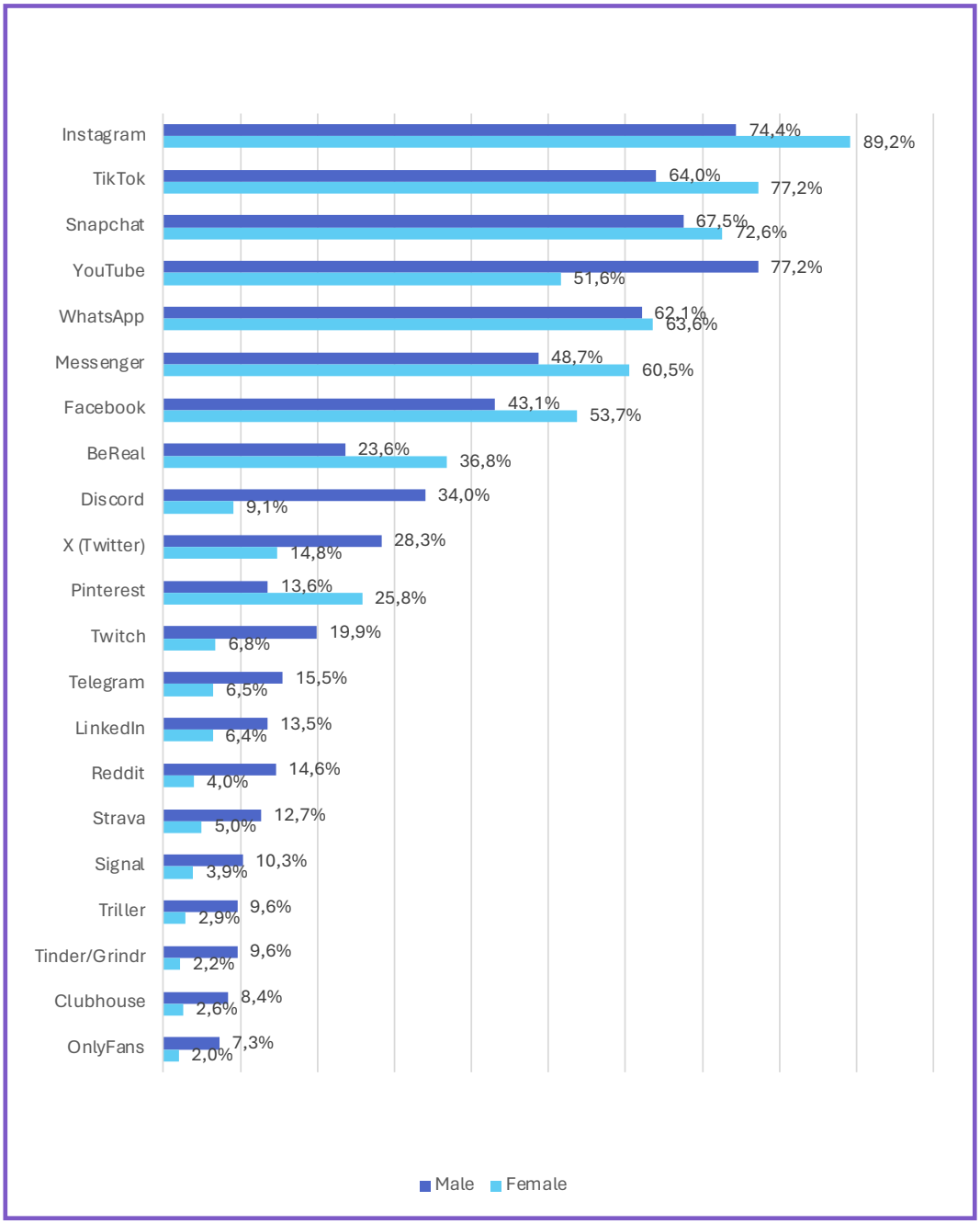


Figure 9: Daily social media use among 16–24-year-olds according to gender (in %; N = 1730)

DUTCH- AND FRENCH-SPEAKING YOUTH PREFER THE SAME SOCIAL MEDIA APPS, ALTHOUGH THERE ARE SOME REMARKABLE DIFFERENCES

The top three social media platforms used daily by Dutch-speaking young people are Instagram, with a usage rate of 81,1% (-6,2%), followed by Snapchat at 70,7% (-2,6%), and WhatsApp also at 70,7% (+8,6%). Additionally, TikTok holds a significant position with a daily usage rate of 70,6%, marking an increase of 1,7%. On the other hand, among French-speaking youth, Instagram remains the top platform, with a usage rate of 8,8% (-3%). Following Instagram, TikTok holds the second position with a usage rate of 70,1% (+0,7%), while Snapchat follows closely behind at 68,2% (a decrease of 7,3%).

In the interviews with young people, we observed that Dutch speakers tend to mention Messenger or WhatsApp more quickly when asked about their most used platforms. French speakers also use WhatsApp, but primarily for family communication.

«BUITEN WHATSAPP EN MESSENGER DIE IK ELKE DAG GEBRUIK OM TE COMMUNICEREN GEBRUIKEN IK OOK NOG VEEL INSTAGRAM, TIKTOK EN BEREAL. IN VOLGORDE: 1. INSTAGRAM 2.TIKTOK 3.BEREAL. INSTAGRAM EN TIKTOK GEBRUIK IK ALS VORM VAN ENTERTAINMENT MAAR OOK VOOR INSPIRATIE, ZOALS GERECHTJES OF LEUKE OUTFITS. MET SOMMIGE MENSEN COMMUNICEER IK OOK WEL VIA INSTAGRAM EN TIKTOK MAAR DIT IS MAAR AF EN TOE." (***WOMAN***, 22 Y.O.)

«1. INSTAGRAM, DIT GEBRUIK IK VOORAL OM FOTO'S EN STORY'S TE DELEN MET VRIENDEN EN BERICHTJES TE STUREN.
2. MESSENGER/FACEBOOK: DIT GEBRUIK IK VOORAL OM MET FAMILIE TE COMMUNICEREN EN VOOR HET WERK.
3. WHATSAPP: GEBRUIK IK OOK VOORAL VOOR HET WERK OM TE BELLEN EN BERICHTEN TE STUREN." (***WOMAN***, 21 Y.O.)

«TOUT D'ABORD, SNAPCHAT EST CONSIDÉRÉ PAR LES JEUNES COMME LE RÉSEAU FÊTARD, AMOUREUX, … MOI J'AIME L'UTILISER CAR C'EST SUR CE RÉSEAU QUE L'ON VA ORGANISER DES SOIRÉES, DES ENTREVUES, DES RENCARDS, … C'EST UN PEU UN RÉSEAU SOCIAL POUR LES RENCONTRES MAIS SURTOUT UN RÉSEAU « FUN » CAR TU ENVOIES TA TÊTE ET TON INTERLOCUTEUR TE RENVOIE LA SIENNE EN RETOUR ET DONC C'EST COMME SI ON TENAIT UNE DISCUSSION EN FACE À FACE SANS POUR AUTANT ÊTRE L'UN EN FACE DE L'AUTRE. À L'INSTAR DE D'AUTRES RÉSEAUX, SNAPCHAT EST PLUS UN RÉSEAU OÙ ON SE RELÂCHE ET OÙ ON PEUT MONTRER UNE AUTRE FACETTE DE NOUS-MÊME EN DEHORS DE CELLE SÉRIEUSE À L'ÉCOLE. ENSUITE, INSTAGRAM JUSTEMENT, EST UN RÉSEAU OÙ L'ON CRÉE DES GROUPES DE CLASSES, DES GROUPES POUR DES TRAVAUX DE GROUPES, C'EST UN RÉSEAU OÙ L'ON PEUT POSTER DES STORYS ET DES PUBLICATIONS DONC JE LE QUALIFIERAIS DE PLUS SÉRIEUX QUE SNAPCHAT. ALORS OUI, ON CRÉE DES GROUPES POUR S'ENVOYER DES RÉELS DRÔLES MAIS CE CÔTÉ PLUS « FOU », FÊTARD DE RETROUVE PLUS SUR SNAPCHAT. ET ENFIN, L'HEUREUX RÉSEAU DES JEUNES MAIS AUSSI LE MALHEUREUX POUR NOTRE CROISSANCE INTELLECTUELLE, TIKTOK, JE NE PASSE PAS UN JOUR SANS OUVRIR CETTE APPLICATION CAR POUVOIR VOIR DES VIDÉOS COURTES ET SANS FIN MAIS AUSSI AVOIR LES DERNIÈRES MODES ET RÉFÉRENCES, DE NOS JOURS TIKTOK EST LE CENTRE DE PRESQUE TOUTE CONVERSATION DONC OUI, IL A BIEN SA PLACE DANS CE TOP 3. DONC J'AI BIEN ÉVIDEMMENT FAIT MON CLASSEMENT PAR RAPPORT AUX RÉSEAUX SOCIAUX (SNAP,INSTA ET TIKTOK) QUE J'EMPLOIE LES PLUS ET DANS LE BON ORDRE. » (***MAN***, 16 Y.O.)

The daily usage of Instagram TikTok and Snapchat is similar between French- (81,8%; 70,1%; 68,2%) and Dutch-speaking (81,1%; 70,6%; 70,7%) young people. The daily usage of Facebook, YouTube and Messenger is higher among French (50,9%; 66,90%; 58,4%) individuals compared to Dutch (45,9%; 62,60%; 50,9%). Dutch individuals (70,7%) have higher daily usage rates for WhatsApp compared to French (52,40%). Other platforms like BeReal, Discord, Twitter (X), Pinterest, Twitch, Telegram, Reddit, Signal, Triller, Tinder/ Grindr, Clubhouse, and OnlyFans also show variations in daily use between French and Dutch individuals, with varying patterns of usage across different platforms.

«YOUTUBE, JE PRENDS PLUS MON TEMPS POUR REGARDER DES VIDÉOS. JE SUIS DES CRÉATEURS DE CONTENU QUE J'AIME BIEN, DU DIVERTISSEMENT QUE J'AIME REGARDER. ET DÈS QU'ELLES SORTENT DES NOUVELLES VIDÉOS J'AIME PRENDRE MON TEMPS POUR LA REGARDER. ÇA ME PERMET DE PRENDRE DU TEMPS POUR MOI. PLUS QUE INSTAGRAM ET FACEBOOK QUI SONT PLUS DEVENUS DES AUTOMATISMES À MON QUOTIDIEN.» (***WOMAN***, 21 ANS)

When comparing social media usage between Dutch- and French-speaking +25-year-olds, we note the following differences in usage:

- WhatsApp and BeReal are more frequently used by Dutch-speaking youth.
- Facebook, Twitter, YouTube, Twitch, Messenger, Signal, Telegram, Clubhouse, Triller and Reddit are more frequently used by French-speaking youth.
- There is no significant difference between language groups for Instagram, TikTok, Snapchat, Pinterest, LinkedIn, Discord, Tindr/Grindr and OnlyFans.

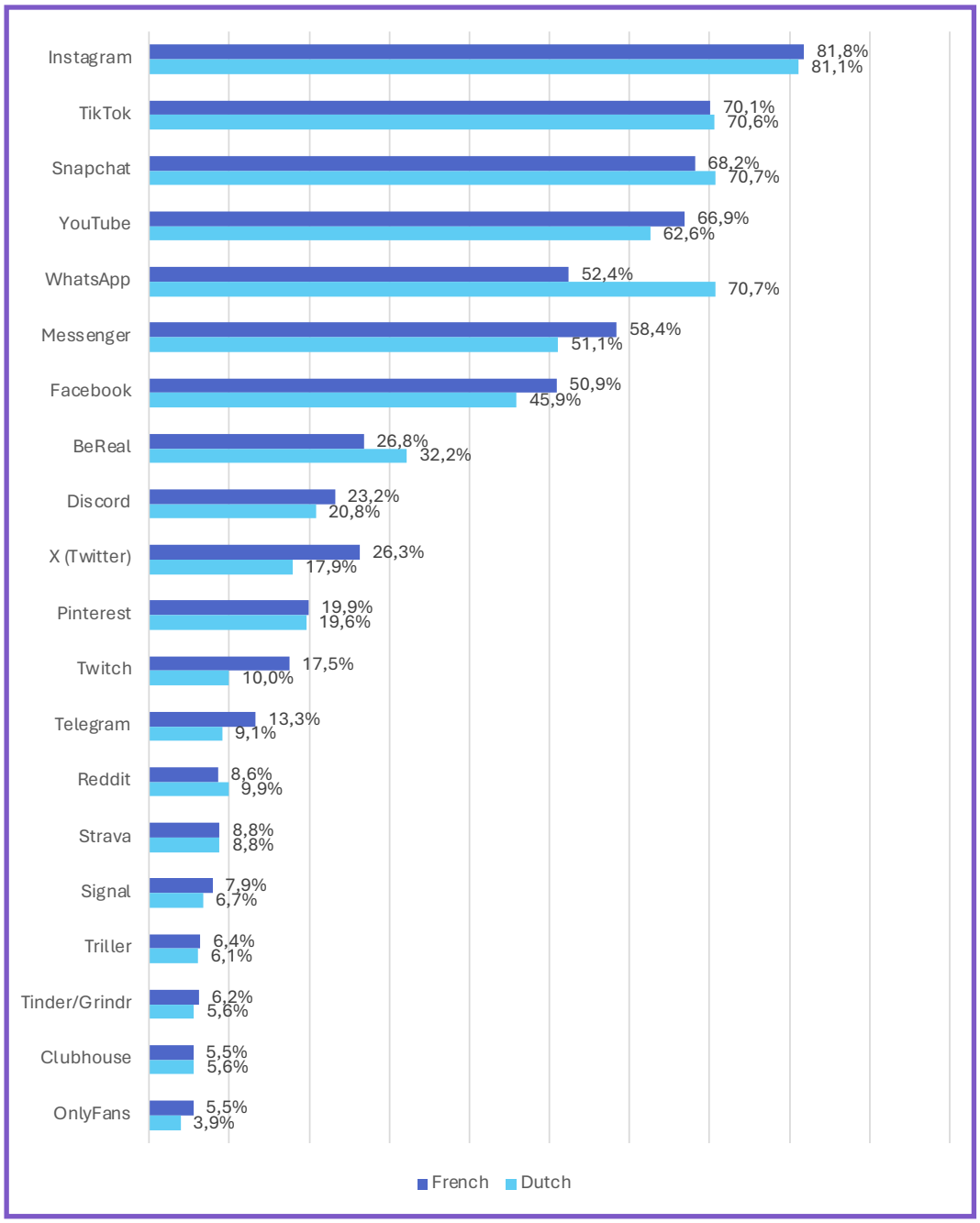


Figure 10: Daily social media use among 16–24-year-olds according to language (in %; N = 1730)

Focus on +25

BELGIAN ADULTS FLOCK TO FACEBOOK, INSTAGRAM, AND MESSAGING PLATFORMS

Facebook and Instagram are the most frequently used social media platforms on a daily basis among individuals aged 25 and older, with daily usage percentages of 77,3% and 63,3% respectively. While YouTube ranks lower in daily usage compared to Facebook and Instagram, it emerges as the top platform for monthly use among individuals aged 25 and older, with a monthly usage percentage of 90,5%. This suggests that while users may not engage with YouTube on a daily basis, they frequently visit the platform for longer viewing sessions throughout the month. Messaging apps like WhatsApp and Messenger are widely used both daily and monthly among individuals aged 25 and older. WhatsApp has a daily usage percentage of 73,2% and a monthly usage percentage of 91,3%, while Messenger has a daily usage percentage of 61,7% and a monthly usage percentage of 87,7%.

The following graph provides an overview of the social media use of Belgians between 25 and 39 years (in %). By comparing daily and monthly use, we gain insights into which platforms are use most intensively and which platforms are most widespread. Specific percentages can be found in table 4.

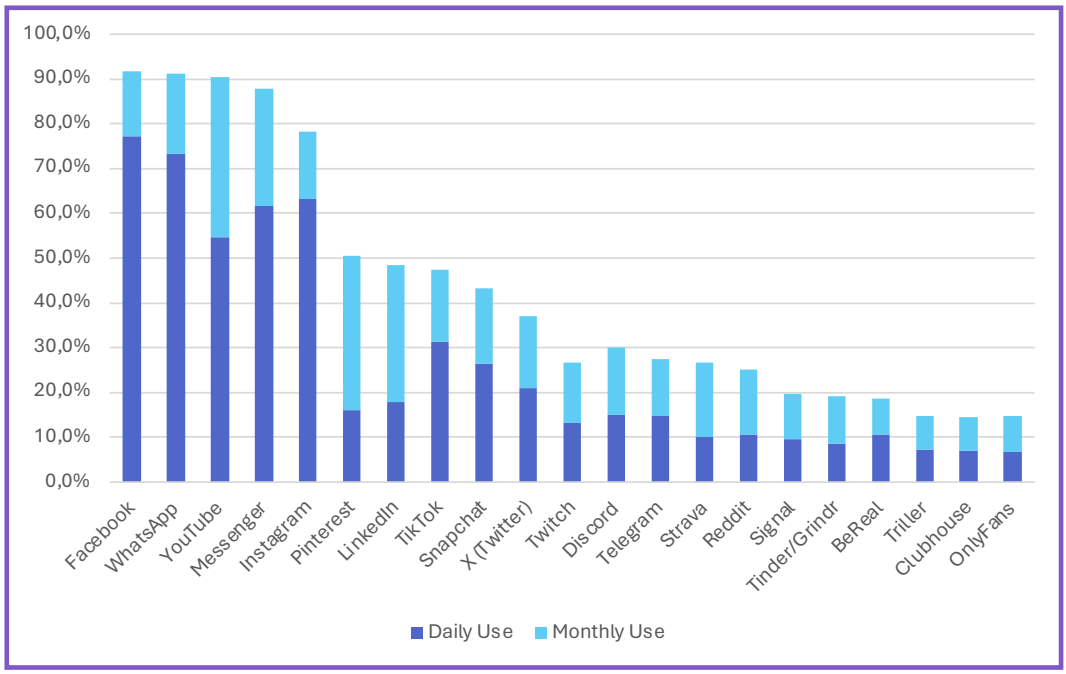


Figure 11: Daily vs. monthly social media use among Belgian 25–39-year-olds (in %; N = 2786)

Male and female +25-year-olds prefer the same social media apps, however women are more into Facebook, Instagram and messaging platforms, while men are more into video

With a daily usage percentage of 71,3 % (-0,3%), Facebook ranks as the top social media platform for men. This first place is shared with WhatsApp with a daily usage percentage of 71% (+0,9%). In third place is YouTube, with a daily usage percentage of 65,5% (-3,2%). Topping the list for women is Facebook, with a daily usage percentage of 83,6% (status quo). Similar to men, WhatsApp is also highly popular among women, with a daily usage percentage of 75,5% (+1,5%). With a daily usage percentage of 67,9% (-3,8%), Instagram holds the third place.

While both men and women tend to prefer the same social media platforms for daily usage, there are

differences in usage patterns between genders. There is a higher percentage of women (83,6%) compared to men (71,3%) using Facebook daily. Also, the daily usage of Instagram is higher among women (67,9%) compared to men (58,8%). The daily usage of WhatsApp is high for both men (71%) and women (75,5%), with women showing slightly higher usage. There is a slighter higher percentage of women (64%) compared to men (59,6%) using Messenger daily. On the other hand, men show higher daily usage of YouTube (65,5%) compared to women (43,8%). Also, the percentage of men daily using TikTok is higher (36,2%) compared to women (26,7%). Other platforms like Snapchat, Twitter (X), LinkedIn, and Pinterest also show variations in daily usage between men and women, with women generally showing slightly lower usage percentages across these platforms.

Looking at overall frequency of use, there are significant differences in social media usage patterns between men and women. This finding suggests that gender plays a role in determining how individuals engage with social media platforms. More specific:

- Women are more frequent users of Facebook Instagram, Pinterest, WhatsApp, and Messenger.
- Men are more active on TikTok, Snapchat, X, YouTube, LinkedIn, Twitch, Discord, Signal, Telegram, Clubhouse, Triller, Tinder/Grindr and Only Fans.

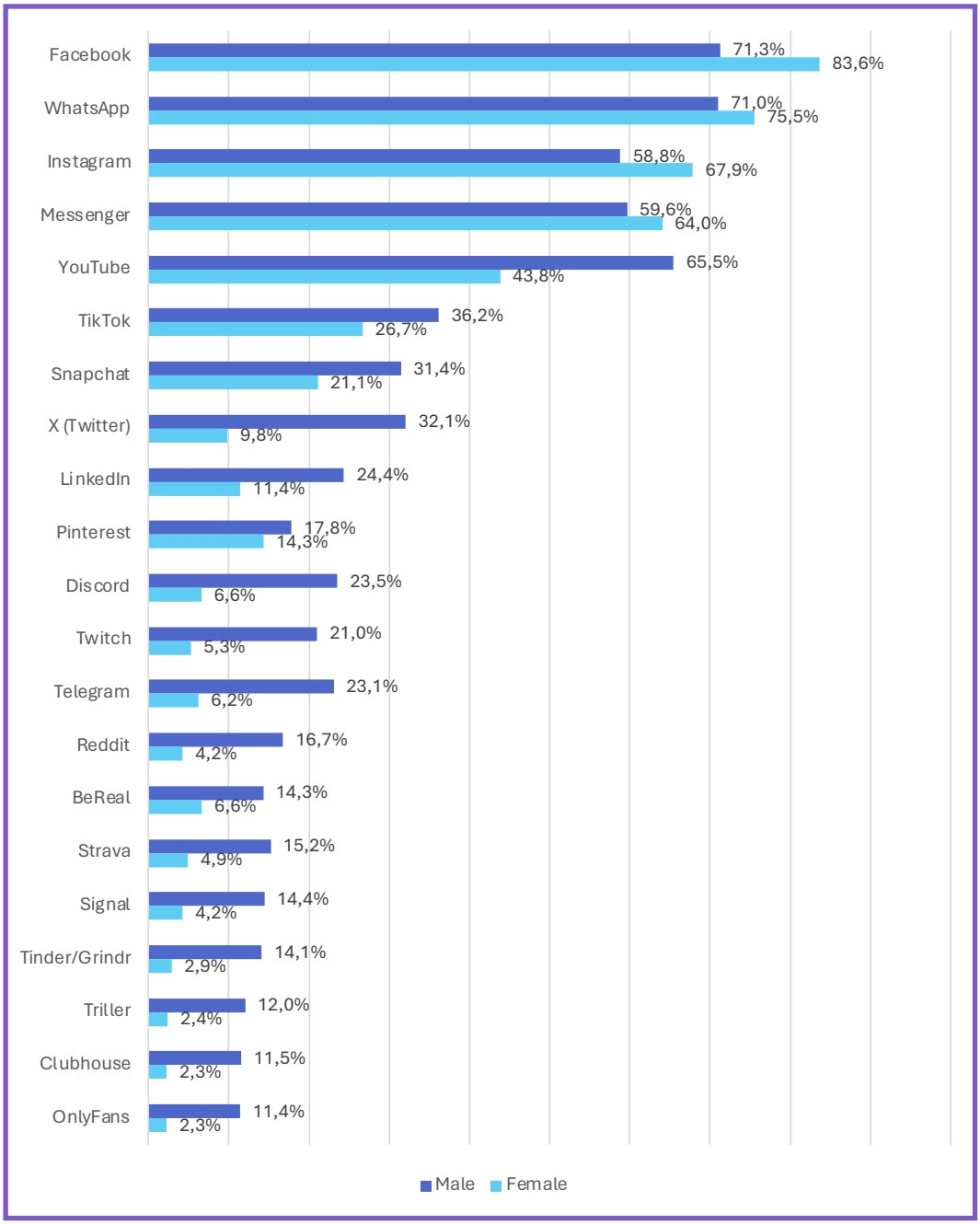


Figure 12: Daily social media use among 25–39-year-olds according to gender (in %; N = 2786)

DUTCH- AND FRENCH-SPEAKING BELGIAN ADULTS PREFER THE SAME SOCIAL MEDIA APPS, WITH A LANGUAGE DIVIDE ON VIDEO AND MESSAGING PLATFORMS

Dutch- and French- speaking Belgian +25-year-olds are mostly active on the same social media platforms, i.e., Facebook, Instagram, YouTube and messaging platforms (WhatsApp and Messenger). The top 3 daily used social media channels among Dutch-speaking +25-year-olds are WhatsApp (80,2%), Facebook (75,7%) and Instagram (65%). Among French-speaking +25-year-olds, the top 3 consists of Facebook (79,3%; -0,3%), Messenger (69,4%; -1,8%) and WhatsApp (64,1%; -1,7%). While some platforms like Facebook and Instagram show slight differences in usage percentages between the two groups, there are also notable differences in platforms like WhatsApp, Messenger, YouTube, and Snapchat where the usage percentages vary more significantly between French and Dutch individuals. It is noteworthy that there are considerably more French-speaking (63,7%) daily YouTube users compared to Dutch-speaking daily users (47,5%). Dutch-speaking Belgian adults use WhatsApp more than Messenger on a daily basis, while it is the other way around for French-speaking Belgians and the difference is less outspoken.

We further analyzed whether there is a considerable gap in social media usage between Dutch- and French-speaking +25-year-old Belgians. We note the following significant differences:

- There is no difference in social media usage between Dutch- and French-speaking Belgian adults for mainstream platforms.
- French-speaking Belgians use LinkedIn more frequently than Dutch-speaking Belgian adults.
- There are some differences between French- and Dutch-speaking adults in usage of some niche social media apps. French-speaking adults are more active on Clubhouse, Tinder/Grindr and Only-Fans. Dutch-speaking adults are more active on Triller, BeReal and Reddit.

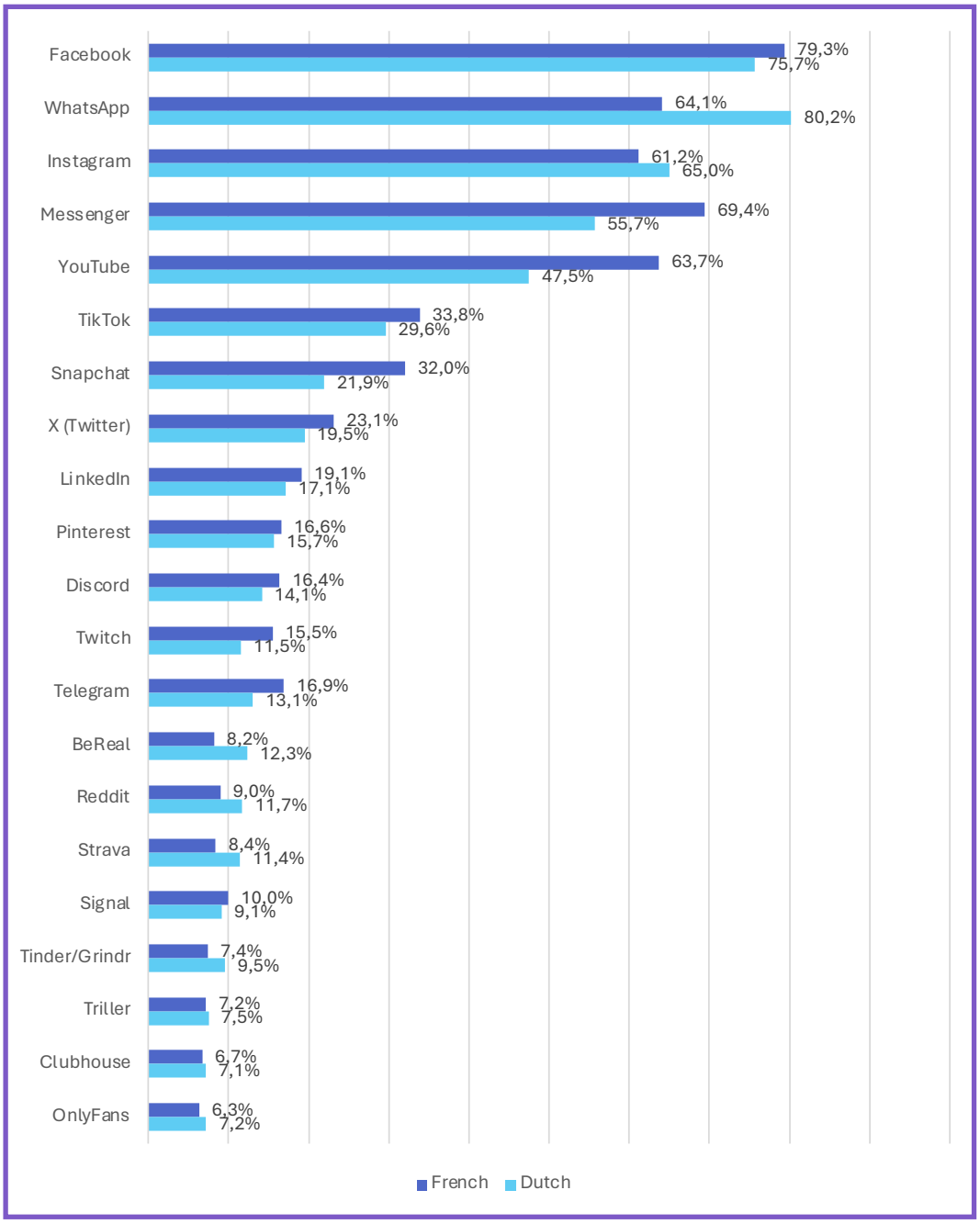


Figure 13: Daily social media use among 25–39-year-olds according to language (in %; N = 2786)

Motivations Behind Social Media Use

KEY INSIGHTS

- **Social media platforms like TikTok, YouTube, and Instagram are favoured for entertainment and relaxation, especially among younger age groups.**
- **WhatsApp and Messenger are popular choices across all age groups for staying connected with friends and family. Instagram has evolved beyond a platform for sharing photos and stories among youth; it has also become a prominent messaging tool.**
- **Instagram and TikTok serve as sources for staying informed about activities of influencers, celebrities, and athletes.**
- **YouTube emerges as a significant platform for learning across all age groups.**
- **Instagram and Pinterest are widely used for gaining inspiration.**
- **Keeping up to date with the news is not a prominent reason for social media app usage, but Facebook, Instagram, and Twitter serve as main sources to do so.**
- **LinkedIn is primarily used for work-related purposes.**
- **Instagram is the preferred platform for posting updates, photos, and videos.**
- **More than half of the social media users at least uses filters sometimes when posting a photo or video. One fifth of the young people always uses filters.**

To gain insights into the perks of social media according to Belgians and the activities people engage in on each channel, we asked the frequent users (at least once a week) of each social media channel what they use it for. Participants could select per platform which activities (provided in a list) they engage in. Hence, we were able to gain insights into the main reasons for which people use a social media channel. The following figure shows the main activities frequent users engage in per social media platform, according to age group. Moreover, the weekly use of the platform according to age group is presented above.

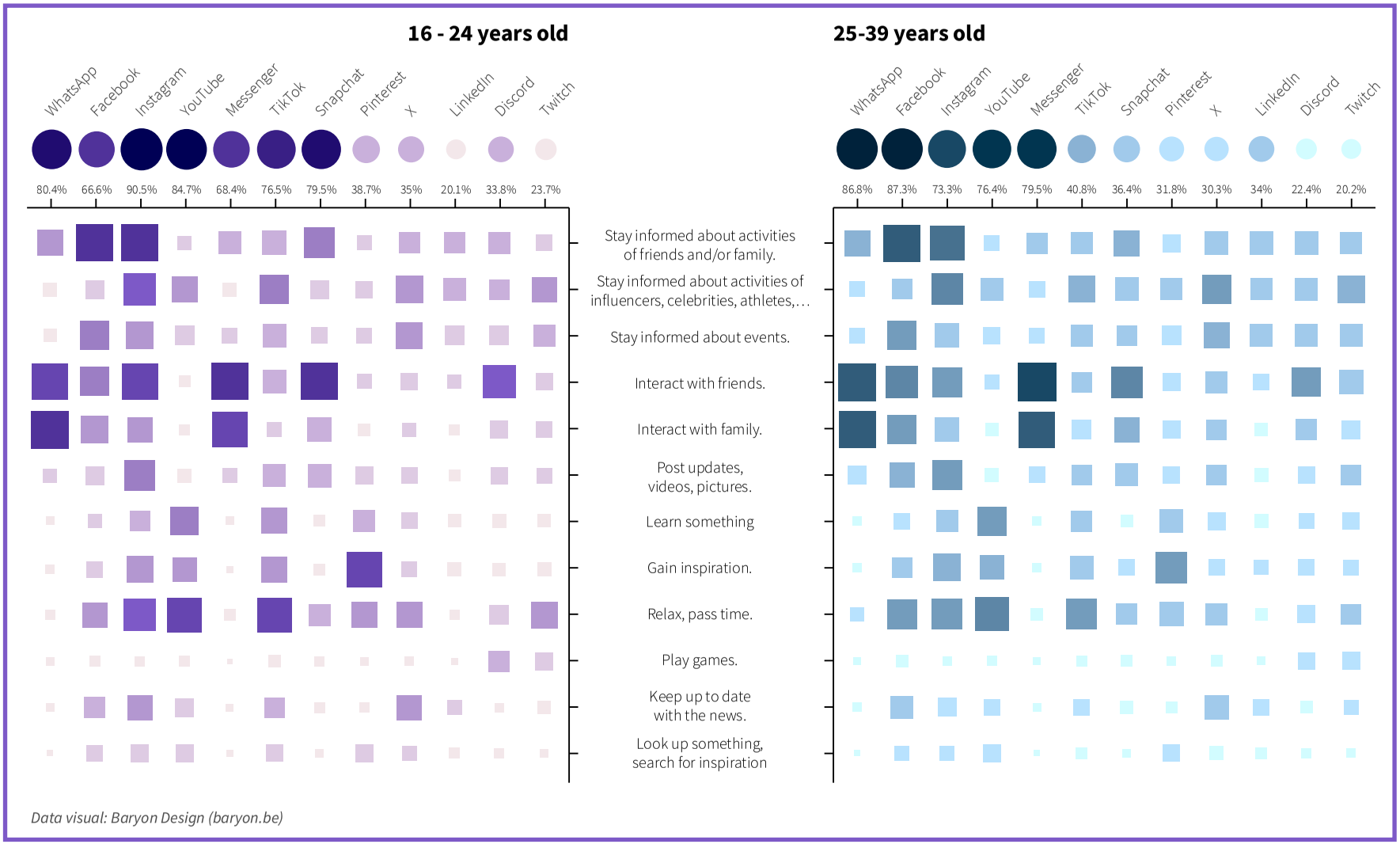


Figure 14: Motivations behind social media use according to age group

SOCIAL MEDIA AS A FAVORITE PASTIME

Among younger age groups (16-24), platforms like TikTok (61,3%[3]), YouTube (60,8%) and Instagram (47,2%) and are favored for entertainment and relaxation, with significant percentages indicating usage for passing time. Among +25-year-olds, platforms like YouTube (56,8%), TikTok (47,5%), Instagram (47,2%) and Facebook (44,4%) are the ones they turn to for relaxation and passing time.

Twitch also serves as a popular platform for leisure activities, with 35,9% of 16-24-year-olds indicating usage for relaxation and entertainment and 16,3% for playing games.

« QUAND JE VEUX ME DIVERTIR J›UTILISE SURTOUT YOUTUBE ET TIKTOK. SUR TIKTOK C'EST PLUS POUR ME DIVERTIR RAPIDEMENT, QUAND JE N'AI PAS BESOIN D'ÊTRE TRÈS CONCENTRÉE OU QUAND JE N'AI PAS ENVIE DE REGARDER UN TRUC SPÉCIFIQUE. SUR YOUTUBE C'EST QUAND J'AI PLUS DE TEMPS (PAR EXEMPLE EN SOIRÉE OU DURANT UN REPAS) ALORS JE LANCE UNE VIDÉO QUI SERA BEAUCOUP PLUS LONGUE SUR UN SUJET PRÉCIS. » (***WOMAN***, 22 Y.O.)

«OUI, SUR INSTAGRAM C'EST PLUS DU SNACKING CONTENT, DONC DES CHOSES RAPIDES, ET SUR YOUTUBE LES PRODUCTIONS SONT PLUS LONGUES » (***WOMAN***, ***22 Y.O.***)

SOCIAL MEDIA TO STAY CONNECTED

WhatsApp (16-24: 65,6% - 70,8%; 25-39: 73,5% - 69,4%) and Messenger (16-24: 69,5% - 64,4%; 25-39: 73,5% - 69,4%) are popular choices across all age groups for staying connected with friends and family, with high percentages indicating usage for interacting with friends and family members. Also Facebook seems to fulfil this function though to a lesser extent (16-24: 43,5% - 38,6%; 25 – 39: 53,5% - 43,8%).

« ALORS J'UTILISE PLUTÔT WHATSAPP DANS LE CADRE DU PRIVÉ OU ALORS POUR DES DISCUSSIONS PLUS SÉRIEUSES. JE QUALIFIERAI WHATSAPP DE RÉSEAU SOCIAL POUR MA SPHÈRE PROCHE. JE PARLE SUR CE RÉSEAU SOCIAL AVEC MES PARENTS, PARRAIN, MARRAINE, … OU ALORS MES MEILLEURS AMIS. DONC J'ASSOCIERAI WHATSAPP COMME ÉTANT UN RÉSEAU SOCIAL PLUS SÉRIEUX.» (***MAN***, 16 Y.O.)

Other platforms specifically opted for interacting with friends are Instagram (16-24: 65,3%; 25-39: 46%), Snapchat (16-24: 70,4% - 25-39: 50%) and Discord (16-24:55,3%; 25-39: 41,8%).

INSTAGRAM HAS EVOLVED BEYOND A PLATFORM FOR SHARING PHOTOS AND STORIES AMONG YOUTH; IT HAS ALSO BECOME A PROMINENT MESSAGING TOL.

«PREMIÈREMENT, J'UTILISE INSTAGRAM LE PLUS SOUVENT CAR JE TROUVE QUE C'EST L'ENDROIT LE PLUS FACILE D'ENVOYER DES MESSAGES ET DE PUBLIER DES PHOTOS.» (***WOMAN***, 19 Y.O.)

«OUI JE DIRAIS SNAPCHAT POUR MES AMIS LES PLUS PROCHES, INSTAGRAM POUR MES AMIS ET DES CONNAISSANCES. MA FAMILLE C'EST SURTOUT MESSENGER ET AUSSI DES AMIS. ET WHATSAPP QUELQUES MEMBRES DE MA FAMILLE QUI PRÉFÈRENT WHATSAPP, POUR COMMUNIQUER AVEC DES PERSONNES POUR LES ÉTUDES, AVEC MES AMIS QUI HABITENT À L'ÉTRANGER ET POUR FAIRE DES GROUPES. » (***WOMAN***, 21 Y.O.)

3 The percentages mentioned should be interpreted in terms of the percentage of respondents (i.e., the frequent users – at least weekly – of each platform) who selected this activity as something they engage in / use this particular social media app for.

«HET VAAKST GEBRUIK IK WHATSAPP EN INSTAGRAM, ZE ZOUDEN EIGENLIJK DE EERSTE PLEK KUNNEN DELEN AANGEZIEN INSTAGRAM OOK EEN CHATFUNCTIE BEVAT EVENREDIG AAN WHATSAPP. … HET GROOTSTE VERSCHIL IS MISSCHIEN OP VLAK VAN CONTEXT IN DE ZIN DAT ER OP INSTAGRAM GESPREKKEN ONTSTAAN DOOR HET DOORSTUREN VAN FOTO'S EN FILMPJES, WAAR OP WHATSAPP OOK ANDERE DINGEN AANBOD KOMEN. NOG EEN NOOT IS DAT DE GROEPSCHAT VAN DE FAMILIE NIET OP INSTAGRAM IS, ENKEL WHATSAPP (SIMPELER VOOR DE "OUDEREN" IN DE FAMILIE;-))" (***MAN***, 19 Y.O.)

To stay informed about activities of influencers, celebrities, athletes,… social media users tend to turn to Instagram (16-24: 51,8%; 25-39: 50,1%), TikTok (16-24: 42,2%; 25-39: 35,4%), X (16-24: 36,3%: 25-39: 33,7%), YouTube among a younger age group (34%) and Twitch among an older age group (16-24: 31,5%; 25-39: 37,4%).

«INSTAGRAM JE PARTAGE EN GÉNÉRAL MES STORY MON QUOTIDIEN MES VOYAGES ET JE VOIS AUSSI CEUX DE MES AMIS OU DE CÉLÉBRITÉS QUI M'INSPIRENT. » (***WOMAN***, 24 Y.O.)

To stay informed about events, Facebook (16-24: 43,7%; 25-39: 43,3%), Instagram (16-24: 38,4%; 25-39: 28,9%), TikTok (16-24: 27,1%; 25-39: 23,7%), Twitch (16-24: 23,6%; 25-39: 26,7%), X (Twitter among an older age group (24,4%) and Discord (25,5%) among a younger age group are consulted.

«J'UTILISE FACEBOOK POUR ÊTRE AU COURANT DES ÉVÈNEMENTS ET SOIRÉES. » (***WOMAN***, CHLOÉ)

«VIA DES ÉVÉNEMENTS SUR FACEBOOK. QUELQU›UN CRÉE UN ÉVÉNEMENT ET AJOUTE TOUS LES INVITÉS, RAJOUTE TOUTES LES INFORMATIONS UTILES, C'EST LE PLUS FACILE. SI CE SONT DES ÉVÉNEMENTS PLUS PRIVÉS ÇA PEUT AUSSI ÊTRE VIA UN NOUVEAU GROUPE MESSENGER CRÉÉ POUR LA SOIRÉE. » (***WOMAN***, 21 Y.O.)

«VOOR EVENTS GEBRUIK IK VOORNAMELIJK FACEBOOK, OMDAT DIE EEN ERG GOEDE FUNCTIE HEEFT OM EVENTS ONLINE TE ZETTEN EN VEEL GROEPEN / ORGANISATIES FACEBOOK OOK GEBRUIKEN." (***WOMAN***, 20 Y.O.)

SOCIAL MEDIA AS A SOURCE OF INSPIRATION

Instagram (16-24: 35,1% - 25-39: 37,5%) and Pinterest in particular (16-24: 62,9%; 25-39: 49,2%) are widely used for gaining inspiration.

«JA PINTEREST IS OOK WEL EEN PLATFORM DAT IK VEEL GEBRUIK. BIJVOORBEELD IK HEB GEL NAGELS EN VOOR EEN NIEUWE SET ZOEK IK VAAK DAAR INSPIRATIE. BINNENKORT VERHUIS IK OOK DUS BEN OOK VOLOP BEZIG MET INSPIRATIE QUA INRICHTING EN MEUBELS. VOOR SCHOOL GEBRUIK IK PINTEREST OOK VAAK STAGE OF DERGELIJKE." (***WOMAN***, 21 Y.O.)

«OH OUI !!! J'AIME BEAUCOUP PINTEREST. J'EN AI POUR DES TENUES, POUR DE LA DÉCO, POUR DES MARIAGES (PARCE QUE MA GRANDE SŒUR VA SE MARIER). C'EST BEAUCOUP POUR M'INSPIRER PAR EXEMPLE LE MATIN JE VAIS SUR PINTEREST POUR SAVOIR COMMENT M'HABILLER POUR LA JOURNÉE. DES CADEAUX. JE PRENDS AUSSI DES IMAGES POUR MES FOND D'ÉCRANS. » (***WOMAN***, 22 Y.O.)

«OM INSPIRATIE OP TE DOEN GEBRUIK IK VOORAL TIKTOK, MAAR SOMS OOK WEL PINTEREST. ALS IK SNEL WIL SCROLLEN EN NIET TE VEEL TIJD HEB VIND IK PINTEREST FIJNER OM TE GEBRUIKEN, OMDAT HET ALLEMAAL FOTO'S ZIJN EN JE HIER SNEL DOOR KAN GAAN. ALS IK MEER TIJD EN ZIN HEB VOOR IETS UITGEBREIDER KIJK IK TIKTOKFILMPJES." (***WOMAN***, 20 Y.O.)

Platforms that are worthwhile mentioning as being used to look up something or search for information are YouTube (16-24: 16,6%; 25-39: 16,2%), Instagram (15,6%; 10,4%) and Facebook (16-24: 12,9%; 25-39: 11,2%) for both age groups and Pinterest and TikTok among 16-24-year-olds.

«JE DIRAIS QU›IL Y A EU UNE ÉVOLUTION, AVANT JE REGARDAIS PLUS SUR YOUTUBE. QUAND J›AVAIS TIKTOK, J'AVAIS TENDANCE À REGARDER SUR CETTE APPLICATION. MAIS MAINTENANT JE DIRAIS QUE J'ALTERNE ENTRE YOUTUBE ET INSTAGRAM. JE DIRAIS QUE ÇA DÉPEND DE CE QUE JE CHERCHE. SI C'EST UNE RECETTE JE VAIS ALLER SUR INSTAGRAM TANDIS QUE SI C'EST POUR UN TUTORIEL DE COUTURE JE VAIS PLUS ALLER SUR YOUTUBE.» (***WOMAN***, 21 Y.O.)

SOCIAL MEDIA FOR LEARNING

YouTube emerges as a significant platform for learning, with notable percentages indicating usage for educational purposes across all age groups (16-24: 40,7% ; 25-39: 43,1%). 34,7% of the 16-24-year-old TikTok-users indicated learning as something they engage in on TikTok.

«HOE IK ZAKEN AANPAK ZOEK IK OP VIA YOUTUBE. DAT IS DAN OOK WEL HET ENIGE MOMENT DAT IK YOUTUBE GEBRUIK. DAAR ZOEK IK DAN SPECIFIEKE TUTORIALS OP." (***WOMAN***, 20 Y.O.)

«POUR ÇA (LES TUTORIELS) JE VAIS SUR YOUTUBE SI J›AIMERAIS UNE VIDÉO, SINON JE REGARDE SUR GOOGLE OU JE DEMANDE À CHATGPT. » (***WOMAN***, 22 Y.O.)

SOCIAL MEDIA AS A NEWS SOURCE

Keeping up to date with the news is a less popular activity on most social media apps, however, worth mentioning are Facebook (16-24: 22,8%; 25-39: 25,4%), Instagram (16-24: 31,8%; 25-39: 17,8%) and X (Twitter) (16-24:29,2%; 25-39: 29,2%).

«J'AI L'APPLICATION LE SOIR (CAR J'AI L'ABONNEMENT GRATUIT GRÂCE À L'ÉCOLE), SINON JE SUIS HUGODECRYPTE SUR INSTAGRAM, QUI EST UN JEUNE INFLUENCEUR QUI PARLE D'ACTUALITÉ DE MANIÈRE ASSEZ OBJECTIVE ET BRÈVE, ET QUAND MES PARENTS ALLUMENT LA TÉLÉ POUR REGARDER LE JOURNAL, JE REGARDE. » (***WOMAN***, 21 Y.O.)

LINKEDIN AS WORK-RELATED SOCIAL MEDIA PLATFORM

LinkedIn is primarily used for work-related purposes, such as networking and professional development, for instance staying informed about the activities of their professional network (16-24: 46,6%; 25-39: 49%), vacancies (16-24: 37%; 25-39: 43,6%) and to interact with their professional network among +25-year-olds (30,4%).

POSTING UPDATES, PHOTOS, AND VIDEOS (WITH FILTERS)

Instagram is the preferred social media platform to post updates, both among 16-24-year-olds (48,4%) and +25-year-olds (44,5%). Young people mainly lurk on Facebook, 32,5% of the +25-year-old Facebook users still posts updates. 25,5% of the 16-24-year-old TikTok users posts updates on TikTok. Another preferred platform to do so is Snapchat (16-24: 27,4% - 25-39: 26%)

«UNIQUEMENT POUR ÊTRE AU COURANT DES ANNIVERSAIRES DES GENS AHAH (PARLANT DE FACEBOOK)**»** (***MAN***, 16 Y.O.)

8,4% of the 16-39-year-old social media users never posts photos on social media. Among those who do post photos, 57% uses filters at least sometimes, and 19,6% always do. For 16-24-year-olds, the percentages are generally slightly higher (59,6% vs. 55,6%). **21% of the 16-24-year-olds always uses a filter** (vs. 18,8%). There is no significant difference between men and women in filter usage.

Social media & brands

KEY INSIGHTS

- **Instagram stands out as the most popular platform for following brands, especially among 16-24-year-olds, with 70,5% of them following brands on the platform.**
- **While Facebook is the second most popular platform to follow brands overall, its popularity differs across age groups, being more favored among 25-39-year-olds compared to 16-24-year-olds.**
- **TikTok emerges as a significant platform for brand following, particularly among 16-24-year-olds, with 44,7% of them following brands on the platform.**
- **Fashion and beauty are the most popular brand categories, especially among women and younger demographics, with Instagram being extensively utilized for engagement in these categories.**
- **A majority of social media users, especially young people, have a positive attitude towards giveaways and discount codes.**
- **18,3% of social media users is willing to pay for ad-free social media, men are more inclined to do so compared to women. Young people have a preference for ad-free content without willing to pay for it.**

SOCIAL MEDIA AS A CRUCIAL BRAND TOUCHPOINT

Instagram and TikTok are the no. 1 platforms for brands to connect with young people. Facebook remains important, in particular among older age groups.

Overall, Instagram is the most popular platform for following brands, with 57,9% of social media users indicating they follow brands on this platform. Among 16-24-year- olds, Instagram is even more popular, with 70,5% of respondents in this age group following brands on the platform. Facebook is the second most popular platform overall, with 46,2% of social media users following brands there. However, it is more popular among 25-39-year-olds (56,4%) compared to 16-24-year-olds (27,5%). TikTok is also a significant platform for brand following, especially among 16-24-year-olds, with 29,3% of all social media users and 44,7% of 16-24-year-olds indicating they follow brands on this platform. YouTube, Snapchat, and X are also used by a notable percentage of respondents for following brands, though less so compared to Instagram and Facebook. Other platforms such as Pinterest, LinkedIn, Twitch, Discord, BeReal, Reddit, and Triller have lower percentages of respondents following brands on them, ranging from 0,6% to 9%.

Fashion and beauty emerge as the predominant brand categories, with gaming and sports also holding significance among the younger demographic, and health, hospitality, and culture gaining prominence among the older demographic. Moreover, women tend to utilize Instagram even more extensively for brand engagement. Fashion and beauty categories, in particular, garner significant attention from them, especially within the 16-24 age group.

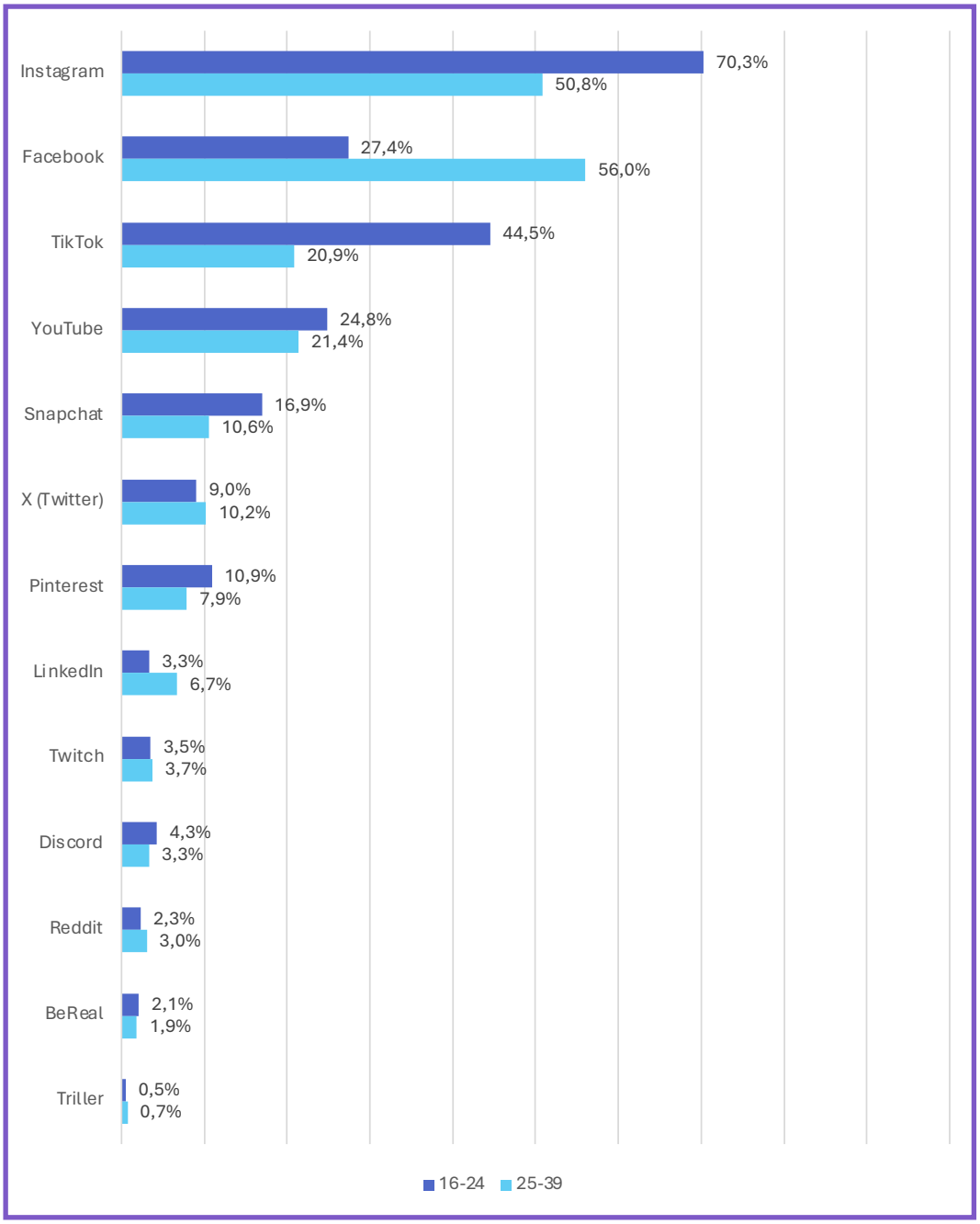


Figure 15: % of Belgians who follow brands on different social media platforms according to age group (in%; N=4494)

To better grasp the potential of social media for brands, we asked active social media users to indicate from a list which brand-related activities they had already undertaken per platform. Only frequent users of the respective social medium (= respondents who use the medium at least weekly) were taken into consideration.

The top social media platforms for brands to connect with Belgians aged 16 to 39 are Instagram, TikTok, Facebook and YouTube.

Instagram is the no. 1 platform where social media users get to know brands or products, as 46,2% of the Belgians aged 16 to 39 claims this to be the case, among 16-24-year-olds this is even 56,3%. Next, it is also popular for searching information about brands or products (29,9%). 24,7% claims to have clicked through to the brand's website or webshop through Instagram. 16,6% has already recommended brands, products or services on Instagram, for instance by tagging someone or sharing a post.

« INSTA JE RECHERCHE PLUS LES MARQUES, LE QUOTIDIEN ET LES LOOKS ET TIKTOK C'EST PLUS POUR LES BLAGUES, LES TRUCS INSOLITES. » (***MAN***, 21 Y.O.)

TikTok also has a high percentage for getting to know brands or products with a quarter (26,2%) of the 16-39-year-old Belgians claiming this to be the case. TikTok is particularly interesting to engage with young people as 43,2% already got to know brands or products through the platform and 26,3% searched for brand-related information. 11,1% has clicked-through to a brand's website or webshop through TikTok (18,1% among 16-24-year-old regular TikTok users).

Last year, some brands we spoke with began exploring TikTok as part of their marketing strategies, typically through partnerships with content creators. We noticed that this year more brands are embracing the platform. They do acknowledge that TikTok demands a unique approach compared to other channels, requiring content that aligns with its inherently entertaining nature. To adapt, some brands have even opted to onboard Gen Z team members or trainees who are familiar with the platform.

> *"We zijn pas recent actief op TikTok. Daar proberen we testing-gewijs wat dingen uit en zetten we campagnes op, want het is toch een andere doelgroep. Het is een heel ander kanaal en wordt anders gebruikt." (**Laura Van Himbeeck**, colora)*
>
> *"Dat is de reden dat we binnen onze scope met TikTok begonnen zijn, omdat we zien dat die doelgroep [jongeren] minder goed te bereiken is via de Meta platformen." (**Amaury Van Kenhove**, Disney)*
>
> *"We zijn nu voor één van onze merken beginnen te experimenteren met TikTok, omdat de nieuwe generatie mama's op TikTok zit. We merken daar een verschuiving, maar het is een compleet nieuw medium voor ons. We willen mee, maar het zou handig zijn mochten we iemand in ons team hebben die effectief in die doelgroep zit, om echt leuke en goede content te maken voor TikTok. Voor ons is het een uitdaging om daar de juiste dingen te doen, maar uitdagingen zijn er natuurlijk altijd. Dat is ook wel fijn." (**Sylvie Verrept**, QLEVR)*

35,6% of the Belgians aged 16 to 39 have learned about brands or products through Facebook. 23,8% already clicked through to a brand's website or webshop through **Facebook**. Next, it is also used for searching information about brands or products (23,5%) and contacting brands or companies (21,8%). Figures are higher among 25+-year-olds compared to 16-24-year-olds.

YouTube is a valuable platform for brands too, as 32,1% of the young Belgians (16 up to 39) has already got to know brands or product through this platform (38,9% among 16-24-year-olds) and 24,9% searched for more information about brands or products on YouTube.

Some niche platforms appear to be interesting for brands for certain brand-related activities. **Pinterest** for instance is considered as a relevant platform to get to know brands or products by 11,3% of the Belgians up to 39 ($_{16\text{-}24}$: 13,1%; $_{25\text{-}39}$: 10,3%). Furthermore 10% of the +25-year-olds has searched for brand-related information in the platform. The platform has a relatively small but steadily increasing number of users over the years.

Pinterest was also frequently mentioned in our conversations with brands as an interesting platform, both for organic content and for advertising.

> *"We zitten ook op Pinterest, maar minder actief. We zien wel dat dat heel populair is en dat dat zichzelf blijft cultiveren." (**Laura Van Himbeeck**, Colora)*
>
> *"Op Pinterest kiezen we vaak om inspirationele content die we posten en we daar dan extra in de kijker zetten. Of als er filmpjes zijn, dan hebben we gemerkt dat Pinterest ook wel vrij goed werkt qua advertising omdat dat dan opvalt tussen de statische beelden die daar vaak circuleren." (**Sven Dhollander**, E5)*

X is from a brand perspective more interesting to target +25-year-olds, compared to youth. It seems to be a fairly interesting platform to search brand related information (10,6%) and get to know brands or products (9,2%), but also contact brands (9,2%).

> *"X zetten we vooral in voor customer care en klachten. We hebben geprobeerd om onze campagnes, onze wedstrijden, onze service te promoten op X, maar de resultaten blijven uit. We zijn aan het bekijken wat we nog kunnen proberen. We gaan zeker nog testen in de komende maanden." (**Fanny Van Muylder**, Krëfel)*

LinkedIn as previously mentioned is mainly used for work-related purposes. Furthermore 9,7% of the Belgians aged 16 to 39 uses the platform to contact brands, 8,4% to search brand-related information and 6,4% to get to know brands.

Twitch has a small user base but is somewhat interesting to search brand-related (6,9%) information and get to know brands or products (6,7%).

NOT ALL POPULAR SOCIAL MEDIA PLATFORMS ARE RELEVANT FOR BRAND COMMUNICATION.

Interestingly, some platforms appear to be irrelevant for brands based on the percentage of regular users who opted for 'no' when asking if they engaged in any of the previously mentioned activities.

Please note that the previous percentages are calculated upon the total number of participants, whereas these percentages are calculated based upon the number of regular users of each platform (at least weekly). As such **Snapchat** (N = 2322; $N_{16\text{-}24}$ = 1255; $N_{25\text{-}39}$ = 1068) and **Discord** (N = 1119; $N_{16\text{-}24}$ = 533; $N_{25\text{-}39}$ = 658) are not the platforms to engage with young people (16-24) as resp. 58,7% (+25: 35,4%); 53,8% (+25: 34,6%) and 65,4% (+25: 58,2%) of its regular users never engaged in one of these brand-rela-ted activities. Interestingly, part of the +25-year-old regular Snapchat and Discord users do claim to get to know brands or products (27,7%; 24,6%), search brand-related information (27,5%; 27,9%) or contact brands (25,8%; 27%) through the platform. Furthermore, **WhatsApp** (N = 3821; N16-24 = 1269; N25-39 = 2551) and **Messenger** (N = 3415; $N_{16\text{-}24}$ = 1079; $N_{25\text{-}39}$ = 2337) seem to be irrelevant for both age groups (16-24: 62,4%; 25-39: 54,9%).

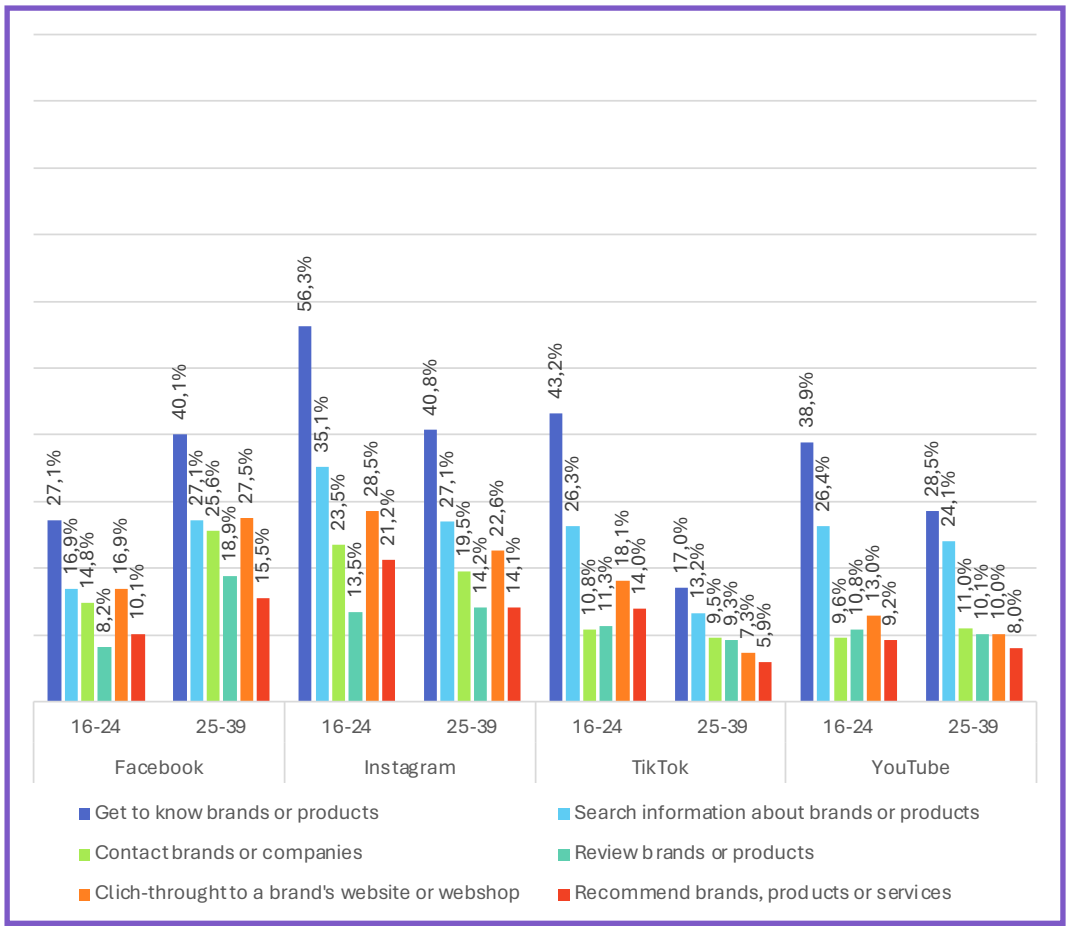


Figure 16: Belgians' touchpoints with brands on Facebook, Instagram, TikTok and YouTube (expressed in % of people who engage in the activity)

BRANDS' STRATEGIC APPROACH OF SOCIAL MEDIA MARKETING

BRANDS PRIORITIZE QUALITY OVER QUANTITY IN THEIR SOCIAL MEDIA ENGAGEMENT, FOCUSING ON EXCELLING ON SELECT PLATFORMS RATHER THAN BEING PRESENT EVERYWHERE AT ONCE.

In recent months, our conversations with various brands have shed light on their strategic approach to social media marketing. We noticed that brands are deliberate and selective in their choices. They prioritize platforms where their target audience is most active and where they can make a meaningful impact. Typically, these platforms include Facebook, Instagram, YouTube, and TikTok.

Additionally, we noticed a cautious stance towards embracing new platforms, foremost because resources are limited. When embracing a new platform, they typically begin with a test phase and a modest budget allocation. Furthermore, we noticed that many brands adopt a protective attitude towards their team, emphasizing the importance of ensuring that their workload remains manageable. They prefer high-quality content on a select few platforms instead of leaping onto every new platform.

> *"Je moet als bedrijf keuzes maken. Je kan niet overal actief zijn als je het goed wil doen." (**Sylvie Verrept**, QLEVR)*
>
> *"Het is ook soms keuzes maken. We hebben nog veel plannen om de kanalen Instagram, Facebook en Pinterest te optimaliseren. Neem je er dan nog een kanaal bij waarop je gaat experimenteren en tijd insteken? Of probeer je het op de bestaande kanalen beter te doen? (**Karen Ongena**, colora)*
>
> *"Het is ook altijd een keuze die je moet overwegen: past dat binnen in onze brand? Er zijn vandaag de dag veel marketingmogelijkheden en kanalen, maar je hebt ook maar een bepaald budget om daaraan te spenderen. Veel bedrijven hebben nogal de neiging om alles te verkennen: daar en daar moeten we iets mee doen. Maar op het einde van de dag heb je maar zoveel tijd en medewerkers om daarop in te zetten. Ik denk dat je dan keuzes moet maken." (**Robby Bleys**, Jysk)*
>
> *"We gaan niet halsoverkop op elk nieuw kanaal meteen een account aanmaken. We nemen een eerder afwachtende houding aan en stellen ons de vraag: hoe gaat dat kanaal zich ontwikkelen? Is dat nuttig voor ons om daarop te zitten? Kunnen we daar de juiste content voor voorzien?" (**Michelle Verbruggen**, Krëfel)*

On the other hand, it was also mentioned that it's crucial for team members to stay informed and experiment with new platforms, for instance Threads.

> *"Als merk zijn we niet aanwezig op Threads, ik persoonlijk wel. Ik vind het deel van mijn rol als social media expert: je moet wel mee zijn met alle nieuwe dingen." (**Sylvie Verrept**, QLEVR)*
>
> *"Over het algemeen, als er nieuwe platformen zijn, maken wij een account, al is het maar om de naam te blokkeren, tenzij we echt zeggen: ja, hier hebben we nu echt geen plaats. […] Vanaf dag een dat Threads er was, zijn we daarop gekomen. Omdat onze ervaring ons leert dat als je ervan in het begin bij bent en je experimenteert ermee zonder dat je een strategie hebt, zelfs dan neem je een voorsprong op de rest en leer je echt veel. Nu experimenteren we daar wat. Ik vind het ook strategisch belangrijk om er te zijn, want X, daar zijn toch veel vragen over te stellen. […] Bij TikTok vind ik dat we te lang gewacht hebben om toch in te stappen, omdat de redenering was: we hebben al veel kanalen en we moeten het allemaal kunnen doen en we gaan het nog wel bekijken. Achteraf gezien, vind ik dat we daar tijd verloren hebben om te leren hoe TikTok werkt en welke content werkt en niet. Hoe rapper dat we kunnen starten en experimenteren, hoe liever." (**Guy Sablon**, MIV-STIBB)*

It was also emphasized that experimentation is necessary, simply by scrolling and viewing content from others, including brands, for those who wish to capitalize on trends and foster creativity. The challenge here is that creativity often requires time, a resource that many teams lack due to their demanding

schedules. Moreover, the workload has not lightened, particularly with the prevalence of video content.

> *"We proberen echt wel op de trends in te spelen, dus wij scrollen zelf heel veel op TikTok om te zien wat er in de fashion wereld trending is. En dat gaan we recreëren." (Amber Vercauteren, E5)*

> *"Soms zitten ze gewoon een uurtje te scrollen op TikTok. Ik zeg: nee, dat is een job, dat is uw werk. Ik bedoel desnoods een halve dag per week mag je experimenteren met whatever, gewoon wat surfen, naar andere merken kijken. Wat doen die? Voor mij maakt dat deel uit van het creatief proces. Dat is de sterkte van ons team, creativiteit. Al de rest kun je leren. Maar je moet vooral een creatieve geest hebben." (Guy Sablon, MIVB-STIB)*

> *"Als er gebrek aan tijd is, is er ook vaak gebrek aan creativiteit. Je hebt tijd nodig om creatief te kunnen zijn, die twee gaan hand in hand. (**Sylvie Verrept**, QLEVR)*

BRANDS RECOGNIZE THE NEED FOR PLATFORM-SPECIFIC STRATEGIES, NO ONE-SIZE-FITS-ALL.

Brands understand the demographic distribution of users on various platforms and adjust their content strategies accordingly. They acknowledge that each platform has its unique characteristics and audience preferences. For instance, they distinguish between the visual nature of Instagram, the classic appeal of Facebook, and TikTok thriving on entertaining content.

> *"Het is voor ons belangrijk om een diverse doelgroep te bereiken en dan vooral divers qua leeftijd. Facebook is vooral oud, Instagram het midden en TikTok vooral jongeren. Ik vind het belangrijk om te blijven zoeken naar nieuwe doelgroepen en echt af te wegen, wat doen we wel, wat doen we niet? We kijken daar elk jaar kritisch naar." (**Amaury Van Kenhove**, Disney)*

> *"Daar zijn we nu meer mee bezig, om voor elk kanaal een andere strategie te bedenken. […] We willen meer nadenken over: welke content wil de klant zien? Elk kanaal heeft ook een andere doelgroep. Op TikTok zijn we nu bijvoorbeeld al bezig om niet meer dezelfde content te posten als op Facebook. Daar proberen we nu een onderscheid in te maken. […] Tussen Instagram en Facebook merken we geen groot verschil. Wat we wel merken, is dat foto's op Facebook bijvoorbeeld nog kunnen werken, maar op Instagram niet. Daar moeten we meer en meer voor reels gaan, want wanneer we foto's posten is onze reach vrij laag. Op Facebook hebben we daar iets minder last van." (**Michelle Verburggen**, Krëfel)*

Brands aim to balance promotional content and inspiring, brand-building content across different platforms. Facebook is mostly used for promotional campaigns while focusing on inspiring, visual brand-related content on Instagram. Platforms like TikTok and YouTube are used primarily for content-driven engagement. They acknowledge the importance of engaging, authentic content that feels genuine and avoids coming across as overly promotional.

> *"We gaan zoveel mogelijk mee met de trends en zorgen voor brand awareness zonder dat Disney echt heel commercieel wordt of te veel marketing berichten post. Natuurlijk fietsen die er af en toe tussen, want dat blijft uiteindelijk wel het doel. Maar we zorgen wel dat we de taal spreken van TikTok. Instagram blijft heel visueel, dus focussen we daarop en zetten we ook wel iets vaker producten in de kijker, of bijvoorbeeld een collab post met een influencer. Facebook is veel klassieker, omdat we daar zien dat die doelgroep dat ook het liefste consumeert." (**Amaury Van Kenhove**, Disney)*

> *"Over het algemeen proberen we ons eraan te houden dat we op Facebook iets meer promotioneel durven zijn, op promoties werken. Instagram moet de brand uitstralen, daar proberen we meer lifestyle, proberen we ook onze food heel erg uit te spelen. Daar is het iets minder promotioneel en bouwen we aan de brand. Op TikTok, Youtube, proberen we puur op content te werken. We moeten de goede vibe proberen over te brengen en zo proberen we de mensen warm te maken. Users gebruiken TikTok vandaag om geïnspireerd te geraken, om dingen op te zoeken. […]*
> *Het sleutelwoord is 'engaging content' die authentiek is. Mensen die aan het scrollen zijn hebben dat*

*direct door als het promotionele er te dik op ligt." (**Bart Van Dijck,** Topbrands)*

*"Het hoofddoel van sociale media is inspireren en het merk in de kijker zetten. We delen er ook onze acties, maar die worden agressiever gepusht enkel naar een bepaalde doelgroep, geïdentificeerd als onze conversielaag. We willen vermijden dat we op onze Facebookpagina actie na actie opnieuw gaan posten en nog eens herposten op een andere manier. Daarom werken we dus ook met gesegmenteerde advertenties." (**Sven Dhollander,** E5)*

*"Vroeger hadden we op onze Instagram feed een mix van inspiratie en promotionele posts, bijvoorbeeld tijdens een actieweek. Maar wij vonden dat niet meer oké. Er zat geen duidelijke lijn in. We hebben dan beslist dat we op de feed willen inspireren. Promoties passen niet in dat rijtje. Als we een inspiratiebeeld posten rond kleurgebruik, zullen we wel in de copy vermelden: by the way, dit is het moment want er is 10 procent in onze winkels. Je neemt de promotionele boodschap voor een stukje mee, maar de hoofdinsteek blijft die inspiratie." (**Karen Ongena,** colora)*

Thus, most brands we spoke with prioritize posting inspirational content and strive to avoid overly promotional posts. As part of their strategy, they consistently focus on optimizing click-through traffic by strategically placing links and providing easy access to relevant content or products.

*"Wat we op onze socials posten, moet ergens naartoe leiden. En dat blijft naar onze website. Onze doelstelling is om door kliks naar onze website te genereren, omdat we dat als onze grote content hub zien waarvan je stukjes meegeeft op je socials." (**Karen Ongena,** colora)*

*"Bij onze post zetten we ook wel vaak een link in bio. Waar we dan naar verwijzen als we toch bepaalde producten aan onze post willen koppelen. Voor promo's of web only acties maken we eerder een story, vermits je daarin wel onmiddellijk een link kan tonen. Maar het merendeel van onze Instagram & TikTok posts hebben dus als doel om te inspireren." (**Amber Vercauteren,** E5)*

*"We hebben een always-on link in bio, die wel mee evolueert met de content die geplaatst wordt. Los daarvan hebben we nu ook specifieke links die we nu kunnen toevoegen. Dat werkt wel voor ons. In stories gebruiken we ook wel heel vaak een linksticker. Dan is het ook wel gemakkelijk voor de consument om rechtstreeks door te klikken naar de juiste pagina voor meer informatie of om rechtstreeks aan te kopen." (**Sylvie Verrept,** QLEVR)*

Video first.

Adapting to the demand for shorter, more dynamic content is still challenging for brands. With the growing influence of platforms and formats like TikTok, YouTube Shorts, and Reels, however, we noticed a shift towards prioritizing video content over static images.

*"Je ziet dat gebruikers - en zelf ben je dat ook - het onbewust gewend zin om korte video's te krijgen. Je moet wel meegaan op die kar. Ik denk dat we daar nog heel hard in kunnen groeien." (**Robby Bleys,** Jysk)*

*"De content moet snel gaan. Van het moment dat je zes seconden kijkt naar een stukje content, ben je engaged. Dat is kort, maar op een app als TikTok is dat gigantisch lang." (**Bart Van Dijck,** Topbrands)*

*"We proberen iets meer video first te denken. Dat is dit jaar misschien onze grootste doelstelling op het vlak van online media. Tijdens het shooten van campagnebeelden willen we dat meer en meer meenemen. Momenteel zit er nog weinig variatie in het type posts die we doen. We doen nu voornamelijk carrousels, maar proberen daar geleidelijk aan wel wat meer variatie in te brengen. We zien zeker het belang in van die reels." (**Shari Ramaut,** colora)*

"Instagram is een heel mooi kanaal om inspiratie op te doen met stille beelden. Maar ook daar merken we dat video belangrijk is en we een tandje moeten bijsteken. […] Het is een andere mindset. Stil beeld versus

*bewegend beeld vergt veel voorbereiding." (**Laura Van Himbeeck,** colora)*

SOCIAL SHOPPING, GIVEAWAYS AND DISCOUNT CODES

52% of the Belgian regular social media users state they only use social media for inspiration and prefer to shop in the physical store or via the webshop. At the same time, 27% sometimes clicks through to a brand's website or webshop via a link shared by an influencer or content creator, while 21% admits to sometimes click on ads or sponsored posts from brands. We are aware that these numbers may differ from actual behavior.

Generally, 58% are positive about **giveaways** and 61,1% are positive about **discount codes**. Young people (compared to 25+) have a slightly more positive attitude towards these incentives. Women are generally a bit more positive about discount codes compared to men, no differences for giveaways were found. Dutch-speaking individuals are slightly more positive towards discount codes compared to French-speaking Belgians. No differences for giveaways were found[4], however one of the interviewees mentioned giveaways work better in French-speaking Belgium:

"We zien geen grote verschillen tussen Vlaanderen en Wallonië qua respons op onze content. Giveaways vind ik persoonlijk wel beter werken in Wallonië. Als er zaken zijn waarbij we meer reach of views hebben in het Franstalige gedeelte, gaat het vaak om de giveaways." (*Michelle Verbruggen, Krëfel*)

"IK VIND DAT EEN LEUKE MANIER OM MENSEN AAN TE ZETTEN OM PRODUCTEN TE KOPEN EN OM NIEUWE VOLGERS TE KRIJGEN. IK VIND GIVEAWAYS LEUKER. OMDAT JE MET KORTINGSCODES WORDT AANGEZET OM ALSNOG GELD UIT TE GEVEN, TERWIJL JE BIJ GIVEAWAYS HET PRODUCT ZELF AL KRIJGT." (*WOMAN*, 20 Y.O.)

"CODES DE PROMOTION C'EST COOL ET ÇA INCITE À ACHETER, JE NE PARTICIPE JAMAIS AUX CONCOURS." (*WOMAN*, 21 Y.O.)

"DES CODES PROMO SI J'AI VRAIMENT QUELQUE CHOSE EN TÊTE QUE JE VEUX ACHETER, LES CONCOURS C'EST SYMPA MAIS ON NE GAGNE PAS SOUVENT." (*WOMAN*, 22 Y.O.)

18,3% of the Belgian social media users aged 16 up to 39 are **willing to pay for social media platforms** if no advertisements are shown in return. There are no remarkable differences between age groups or language groups, but the percentage of men willing to pay for ad-free social media is remarkably higher compared to the percentage of women: 28,2% vs. 8,6% respectively.

While young people acknowledge that ads can be disruptive, they've become accustomed to them as part of their social media experience. Some find certain ads tolerable or even enjoyable if they align with their interests. They wouldn't pay to avoid them. Instead, they perceive ads as the "price" of accessing social media for free. Additionally, the presence of ad blockers further reduces exposure to ads, reflecting a preference for ad-free content without willing to pay for it.

"IK VIND RECLAME OP SOCIALE MEDIA NIET ERG, ALS HET NIET TE VEEL IS, SOMS IS HET WEL LEUK OMDAT JE DAN BV.

[5] *Statistical differences between groups were identified using an independent samples t-test (p <.05).*

NIEUWE KLEDINGMERKEN ONTDEKT. ALS HET DINGEN ZIJN DIE ME INTERESSEREN IS HET MINDER STOREND. IK ZOU ER NIET VOOR BETALEN, OMDAT HET NIET ZO STOREND IS VOOR MIJ." (***WOMAN***, 24 Y.O.)

"RECLAME OP SOCIALE MEDIA STOORT MIJ NIET ECHT, IK ZIE AF EN TOE WEL EENS EEN POST VERSCHIJNEN VAN BEDRIJVEN DIE HUN PRODUCT PROMOTEN MAAR DIE NEGEER IK DIRECT. IK VIND HET NIET ECHT STOREND. OP MIJN COMPUTER HEB IK EEN AD BLOCKER GEÏNSTALLEERD DUS VEEL RECLAME ZIE IK SOWIESO NIET. BETALEN OM GEEN RECLAME TE KRIJGEN ZOU IK NOOIT DOEN, IK ZIE RECLAME KIJKEN EERDER ALS EEN 'PRIJS' OM DE SOCIALE MEDIA GRATIS TE KUNNEN GEBRUIKEN EN ZONDER RECLAME ZOU DIT NIET MOGELIJK ZIJN." (***MAN***, 19 Y.O.)

« NON JE NE PENSE PAS, SI CELA AVAIT ÉTABLI COMME CELA DIRECTEMENT, JE PENSE QUE CELA AURAIT ÉTÉ UNE NORMALITÉ. MAIS SACHANT QU'ON AURAIT VÉCU AVEC LES RÉSEAUX SOCIAUX GRATUITS, JE PENSE QUE LE CHANGEMENT NE SERAIT PAS ENVISAGEABLE DE MON CÔTÉ. LES PUBLICITÉS FONT PARTIE DE LEUR MODÈLE ET J'ARRIVE À PASSER AU-DESSUS. » (***WOMAN***, 21 Y.O.)

Influencer marketing

KEY INSIGHTS

- **74% of Belgian social media users aged 16 to 39 actively follow influencers, content creators, or celebrities, with Instagram and TikTok emerging as the primary platforms for doing so. 85,2% of the 16-24-year-olds and 68,1% of the +25-year-olds follow influencers, content creators or celebrities.**
- **Influencer marketing remains effective and their commercial impact seems to have slightly increased, in particular among young people. Men generally exhibit slightly higher rates of engagement compared to women. French speakers demonstrate higher rates of engagement compared to Dutch speakers. Transparency about sponsored content is crucial for trust.**
- **Influencers significantly shape behavior and lifestyle, with eating healthier and exercising more being the most influenced areas. Younger individuals and women tend to be more influenced across various categories.**
- **Content creators are associated with creativity and follower interaction, while celebrities are linked to talent and aspirational imagery. Influencers are seen as having a large following and are associated with advertising.**
- **43,4% of respondents are familiar with virtual influencers, with younger demographics and men more accepting of them. Transparency regarding the virtual nature of influencers is crucial. There is divided opinion on the authenticity and innovativeness of brand endorsements by virtual influencers, with more skepticism among older age groups.**

THE COMMERCIAL IMPACT OF INFLUENCERS

74% of Belgian social media users aged 16 to 39 follow influencers, celebrities, or content creators on social media, with a notable discrepancy between age groups: 85,2% among 16-24-year-olds (-6,7%) and 68,1% (-7,7%) among those aged 25 and above. Interestingly, among 25-39-year-olds, French speakers show a higher inclination than Dutch speakers (71,2% vs. 64,9%). Notably, there's a declining trend in these figures. However, it's essential to note that these are self-reported behaviors and there were major changes in the questioning methodology compared to last year.

Instagram is the platform par excellence for following influencers and celebrities. Influencers are also followed on TikTok and YouTube. Instagram, YouTube, and TikTok are the platforms for content creators, with Twitch also being somewhat popular (niche). Among French-speaking Belgians, Snapchat, X, YouTube, and Twitch are considerably more popular for following influencers.

Young people who follow influencers, content creators or celebrities, are convinced it's a good idea for brands to involve influencers for commercial purposes (69,9%). Among 25+-year-olds, this percentage is 56,8%, in line with last year. Furthermore, transparency is important, as 62,1% of the 16-24-year-olds and 65,1% of those aged 25-39 who follow influencers, content creators or celebrities consider it important to very important that influencers, content creators, and celebrities clearly disclose when their posts are sponsored and therefore commercial in nature.

"JE PENSE QUE S'ILS SONT HONNÊTES SUR LA MARQUE C'EST OK, S'ILS AIMENT RÉELLEMENT CE QUE FAIT LA MARQUE C'EST OK DE LA PROMOUVOIR MAIS COMME BIEN SOUVENT ILS SONT PAYÉS POUR C'EST COMPLIQUÉ DE SAVOIR SI C'EST HONNÊTE OU NON. JE PENSE QU'IL Y A ÉGALEMENT UNE SORTE DE RELATION QUI PEUT S'INSTALLER ET QU'IL Y A DES

INFLUENCEURS À QUI TU FAIS CONFIANCE AU FIL DU TEMPS. » (***WOMAN***, 22 Y.O.)

"ALS RECLAME IN DE VORM VAN EEN INFLUENCERVIDEO VOORKOMT, MAG HET OOK NIET TÉ HARD OVERDREVEN WORDEN. IK APPRECIEER HET ALS INFLUENCERS OPRECHT OVERKOMEN EN NIET EENDER WELK PRODUCT DAT ZE GESPONSORD KREGEN AANRADEN. ALS IK OP TIKTOK SCROL, VIND IK HET BIJVOORBEELD WEL LEUK OM AF EN TOE PRODUCTEN AANGERADEN TE KRIJGEN." (***WOMAN***, 20 Y.O.)

Brands often perceive disclosure as the responsibility of the influencer and they assume that the agency they are collaborating with adequately informs the influencers. It was also mentioned that it's not easy to keep up with all country-specific regulations, making it difficult to stay fully compliant across multiple jurisdictions.

Influencer marketing is an effective marketing strategy. Of the people who follow influencers, content creators or celebrities, 29,2% (+1%) indicated that they have bought a product or service, 34,6 (+1,5%) indicated that they started following a brand on social media and 44,7% (+3,3%) indicated they looked up more information about a brand, due to an influencer in the past three months. Thus, collaboration with influencers still pays off for brands, and their impact among seems to have slightly increased. Among young people following influencers, content creators and/ or celebrities, 33,7% (25-39: 26,6%) indicated that they have bought a product or service, 38,5% (25-39: 32,4%) indicated that they started following a brand and 51,3% (25-39: 41%) indicated they looked up more information about a brand, due to an influencer in the past three months. The following graph provides an overview and evolution of these percentages based on the number of young people that follow at least one influencer.

"IK HEB AL MEERDERE KEREN IETS GEKOCHT DAT GEPROMOOT WERD DOOR INFLUENCERS. VAAK IS HET MAKE-UP, OMDAT ZE ER DAN EEN MAKE-UPLOOK MEE MAKEN EN HET PRODUCT ER HEEL MOOI UITZIET. SOMS OOK WEL EENS SKIN CARE. ACHTERAF BEN IK WEL ALTIJD TEVREDEN, OMDAT IK HET WEL BELANGRIJK VIND DAT IK MIJN RESEARCH DOE OVER HET DESBETREFFENDE PRODUCT." (***WOMAN***, 20 Y.O.)

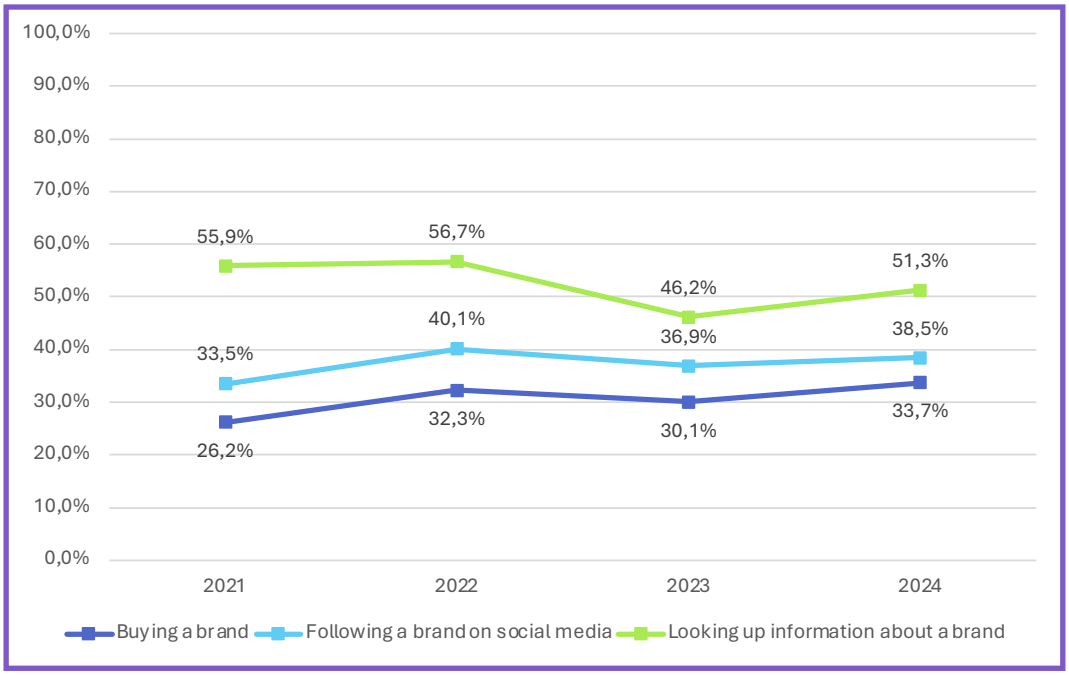


Table 8: Conversion in response to influencer content among Belgian young people (16-24) – evolution 2021 – 2024

Furthermore, men generally exhibit slightly higher rates of engagement compared to women across various brand-related actions prompted by influencers. Specifically, men are more likely to purchase a product or service (31,8% vs. 26,1% for women), start following a brand on social media (38% vs. 31,4% for women), and seek more information about a brand (46,7% vs. 43% for women). Language group also plays a role in influencing consumer behavior in response to influencer content. Dutch-speaking Belgians demonstrate slightly lower rates of engagement compared to French-speaking Belgians. Specifically, Dutch speakers are less likely to purchase a product or service (26,6% vs. 32,5% for French speakers), start following a brand on social media (32,1% vs. 37,9% for French speakers), and seek more information about a brand (42,7% vs. 47,3% for French speakers). More details are provided into the following tables, in which age group is also taken into account.

	Men			Women		
	16-24	**25-39**	**Total**	**16-24**	**25-39**	**Total**
buy a product or service	34,3%	30,3%	31,8%	33,7%	23,9%	26,1%
start following a brand on social media	39,9%	36,9%	38%	37,2%	28,2%	31,4%
look up more information about a brand	51,6%	43,8%	46,7%	51,9%	38,1%	43%

Table 9: In the past three months, did you … due to an influencer, celebrity or content creator? (in % of people who follow influencers, content creators or celebrities) – gender x age group

	Dutch			French		
	16-24	**25-39**	**Total**	**16-24**	**25-39**	**Total**
buy a product or service	31%	24,2%	26,6%	37,1%	29,8%	32,5%
start following a brand on social media	35,6%	30,2%	32,1%	42,2%	35,4%	37,9%
look up more information about a brand	50,4%	38,4%	42,7%	52,6%	44,2%	47,3%
	Dutch			**French**		
	16-24	**25-39**	**Total**	**16-24**	**25-39**	**Total**
buy a product or service	31%	24,2%	26,6%	37,1%	29,8%	32,5%
start following a brand on social media	35,6%	30,2%	32,1%	42,2%	35,4%	37,9%
look up more information about a brand	50,4%	38,4%	42,7%	52,6%	44,2%	47,3%

Table 10: In the past three months, did you … due to an influencer, celebrity or content creator? (in % of people who follow influencers, content creators or celebrities) – language group x age group (N=4209)

INFLUENCER MARKETING IS AN INTEGRAL PART OF MOST BRANDS' STRATEGIES

The importance of personal connections in influencer marketing.

All brands we spoke with, recognize the importance of selecting influencers based on more than just audience size. Brands focus on finding influencers whose profile and content resonate with their identity, ensuring a more authentic connection with their target audience.

> *"Helemaal in het begin van influencermarketing werd er door veel merken alleen maar gekeken naar het bereik. Dat doen wij dus niet. Er moet een match zijn met de campagne." (**Elke De Mayer**, Wavemakers)*

> *"Onder influencers merk je al snel voor wie het, take the money and run is. Of wie de influencers zijn die echt fan zijn. Zij steken er meer energie in." (**Amaury Van Kenhove**, Disney)*

The search for the right influencers for a brand is diverse and often involves a combination of outsourcing and in-house efforts. Brands may collaborate with agencies, utilize specialized software, or rely on their own connections and intuition to identify suitable influencers. Additionally, brands actively review requests from influencers, responding to those that align with their brand values and campaign objectives.

> *"We krijgen zelf veel requests binnen, vooral via Instagram. We kunnen dan zelf kijken of dat profiel bij onze brand past. Dat is voor een stuk ook heel subjectief, maar wij proberen ook wel door te vragen en kijken naar statistieken. Komt de doelgroep ook overeen met de onze? Maar ook daar kan het wisselen, want soms willen we een kanaal dat minder goed bij ons past om net meer mensen te bereiken." (**Robby Bleys**, Jysk)*

The cultivation of personal relationships plays a pivotal role in influencer marketing. Brands acknowledge the importance of fostering genuine relationships with influencers that align with their brand identity. Personally reaching out to influencers is considered intensive yet rewarding, ensuring alignment and clarity in collaboration. This emphasis on personal relationships underscores why some brands prefer in-house approaches and limit outsourcing or agency involvement to creating a shortlist of well-suited profiles.

> *"Vaak weet ik zelf wel vrij goed met wie dat ik wil samenwerken. Omdat je natuurlijk wel iemand wilt die aansluit bij het brand. Ik contacteer ze zelf als ik er genoeg tijd voor heb. Dit is erg intensief, want influencers hebben veel vragen en tegen sommige mensen moet je heel duidelijk zeggen waar het wel en niet om gaat." (**Amaury Van Kenhove**, Disney)*

> *"Die persoonlijke aanpak vind ik sowieso belangrijk op het vlak van influencermarketing. We sturen ook altijd een handgeschreven kaartje, zeker bij de producten die ze ontvangen, om die ervaring toch net iets persoonlijker te maken. […] Het werkt wel fijn om op die manier met onze influencers om te gaan, zeker omdat ik weet dat die onderling ook heel veel met elkaar communiceren. Je moet dus altijd je best blijven doen om goede relaties op te bouwen en te onderhouden. Als je een misstap doet, of je hebt bepaalde zaken op een bepaalde manier afgehandeld en die zijn niet goed ontvangen geweest door de influencer, dan weet je gewoon dat die informatie ook gaat doorgegeven worden aan hun netwerk van influencers." (**Sylvie Verrept**, QLEVR)*

A mentioned benefit of long-term agreements and nurturing relationships, is receiving spontaneous endorsements and influencers creating and share more brand-related content than contractually agreed upon.

> *"Omdat we proberen om een goede verstandhouding te behouden, krijg je soms ook wel gratis reclame daarvoor terug. Het is niet dat dat contractueel afgesproken is, maar zij zijn spontaan bereid om bijvoorbeeld die commerciële actie te delen." (**Sylvie Verrept**, QLEVR)*

> *"Door unieke dingen te kunnen aanbieden, zien we ook wel dat de return van influencers veel hoger is dan wat we eigenlijk hadden afgesproken of verwacht." (**Amaury Van Kenhove**, Disney)*

Balancing creative freedom and strategic guidance.

We noticed a delicate balance between fostering the creative freedom of influencers and content creators while providing strategic guidance to ensure brand alignment. Brands value the creativity of influencers and trust in their ability to authentically connect with their audience.

> *"En effet, on les (les influenceurs) briefe dans les grandes lignes, on leur donne les points les plus importants. Nous, ce qu'on aime bien, c'est de leur faire confiance, et de les laisser s'approprier ces sujets-là pour que ce soit naturel. …" (**Laure Peten**, Carrefour)*

> *"Het gaat vooral ook om luisteren naar de influencers en niet een voorgekauwd concept voorleggen dat het meeste kans op slagen heeft. Content creators die zelf binnen hun eigen editoriale lijn dingen kunnen verzinnen, iets waar je als brand niet direct aan zou denken en waarover je afvraagt hoe het over gaat komen. Maar als zij je brand drie keer vermelden tijdens een filmpje op een manier die past bij hoe ze altijd spreken, dan denk ik dat dit waardevol is. Dus meer zeggenschap voor de content creator zelf, dat is een leuke evolutie." (**Amaury Van Kenhove**, Disney)*

> *"Je ziet vaak dat content creators al zelf met een plan komen: ik kan dat en dat doen. We werken daarin heel flexibel samen. We geven wel bepaalde richtlijnen mee over wat we graag in the picture willen zetten. Maar het belangrijkste is dat je moet onthouden dat zij zelf het beste weten hoe ze hun doelgroep kunnen bereiken. We proberen niet te veel richtlijnen mee te geven, want ik denk dat dat averechts werkt. We laten hen zoveel mogelijk vrij." (**Robby Bleys**, Jysk)*

However, they also recognize the necessity of clear direction through specific briefings.

> *"Ervaring leerde ons dat zo specifiek mogelijk zijn het beste werkt. Betreffende timing, tekst, wat er zeker in de copy moet staan en dat we graag de content zien voordat je live gaat. Om ervoor te zorgen dat alles zo goed mogelijk bij ons brand past, zonder de creativiteit aan te tasten. Als het een heel creatief concept is dat de influencer wil doen, dan willen we ook eerst een script of een soort opzet lezen." (**Amaury Van Kenhove**, Disney)*

The degree of rigidity in briefings and the level of control vary depending on the type of partnership and the agreements made regarding compensation. In long-term collaborations, brands recognize that timely compensation is essential for influencers, acknowledging it as their professional income. To retain a degree of control, payments are frequently disbursed incrementally as the project advances.

> *"Dat is natuurlijk wel met free goodies: je hebt minder inspraak. Je geeft een gratis product, dus vind ik dat je minder kritisch moet zijn of minder dingen moet verwachten van de influencer. Er is ook contractueel weinig afgesproken." (**Sylvie Verrept**, QLEVR)*

The tracking of return on investment in influencer marketing remains a challenging aspect, although there are now several methods available to measure, for instance, the conversion rates attributed to an influencer's efforts.

> *"Meestal stuur ik wel een linkje door, zodat ik kan weten hoeveel er effectief hebben doorklikt op de link die zij gedeeld hebben. Ik vind het wel nuttig om dat te weten." (**Sylvie Verrept**, QLEVR)*

> *"Zij krijgen van ons een gepersonaliseerde UTM-tag. Door die tag kunnen we - met het systeem waar wij mee werken - perfect gaan kijken: hoeveel click-throughs zijn er door een bepaalde influencer geweest? […] Door onder andere die UTM-tags hebben we een heel goed beeld van welke visibiliteit en welke sales er gegenereerd worden door welke influencer." (**Elke De Mayer**, Wavemakers)*

From barter deals to mutually beneficial partnerships.

Over the years, we noticed a maturation of the industry, driven by a growing awareness of the value of influencers. From brands sending DM's to influencers asking them if they want to promote their brand in return for free goods, to contractual agreements between brands and content creators with or without the involvement of an external party, such as an influencer agency or even a manager on the influencer's side. This shift signifies a more structured and professional approach, where both brands and influencers recognize the importance of clear expectations, compensation, and strategic alignment in their collaborations.

While some smaller influencers may still be persuaded with free products, viewing it as an opportunity to expand their own audience by leveraging the brand's reach, it is also noted that influencers are becoming increasingly aware of their value, marking the end of barter deals.

> *"De unboxing van pakketjes heeft er volgens mij voor gezorgd dat influencers vaak door consumenten met scheve ogen bekeken worden. Als zij die alles krijgen. We zijn nu wel voorbij de unboxing stage. Ik denk niet dat nog veel mensen dit doen, tenzij het om een afgesproken pakketje gaat. Wat ik leuk vind, is dat veel mensen en dan vooral bekende Vlamingen en content creators wel wat selectiever zijn geworden. Ze zijn dus niet overly commercial en doen niet alles wat op hun pad komt. Wat natuurlijk de brands die het goed doen, of die zij leuk vinden, ten goede komt." (**Amaury Van Kenhove**, Disney)*

> *"Soms moeten we onze klanten een beetje opvoeden: de tijd van de barterdeals - producten in ruil voor content of gratis samenwerkingen - is gepasseerd. We moeten echt inzetten op betalende deals, omdat je dan naar de professionaliteit kan gaan. Een influencer, ik denk dat veel mensen daar nog een foutief beeld van hebben." (**Elke De Mayer**, Wavemakers)*

On the other hand, it was also mentioned that some influencers have become quite expensive, making collaboration with them no longer feasible.

> *"We proberen influencers heel laagdrempelig in te schakelen in ruil voor gratis producten. Dat is voor ons kostenefficiënt, ondanks dat we veel tijd moeten steken in alle contacten. Als daar grotere budgetten beginnen tegenover te staan... Het is een dun evenwicht. Vorige week via via een offerte binnengekregen van een iets bekendere influencer. Dat is niet meer betaalbaar, dat zit boven de grens voor ons." (**Bart Van Dijck**, Topbrands)*

> *"Sommige influencers tegenwoordig… de bedragen lopen serieus op. We vallen er soms van achterover. Als je via een agency werkt, moet hun fee daar ook nog bij." (**Guy Sablon**, MIVB-STIB)*

Brands do recognize the value of influencer content and its resonance with audiences. The versatility of content was also mentioned, which can be repurposed for advertisements, thereby extending its lifespan and effectiveness. Additionally, brands try to leverage the influencer's reach, for instance, through collaboration posts. Often, this proves to be a win for the influencer as well, providing negotiation opportunities regarding compensation.

> *"In een betaalde samenwerking staat standaard dat wij de rechten krijgen op het beeldmateriaal, dus dat wij het mogen gebruiken op onze kanalen. Dat kunnen mails zijn, dat kunnen advertenties zijn." (**Sylvie Verrept**, QLEVR)*

> *«Ils (les influencers) peuvent être utilisés de deux manières, les influenceurs, comme canal média, mais aussi comme canal de production. Typiquement, nous, on va parfois demander à un influenceur de créer du contenu et de le poster juste sur sa page à lui, comme ça, on touche son audience, etc., l'influenceur, en tant que canal média, disons. À côté de ça, on peut aussi parfois juste faire appel à des créateurs pour créer du contenu pour nous, sans qu'eux, le postent sur leur compte." (Laure Peten, Carrefour) […] Maintenant, ils appellent même ça « Influencers Generated Content. » Vous voyez le UGC de base, donc « User Generated Content », est un peu arrivé à ce IGC de se dire « L'influenceur qui, quand lui poste sur son compte d'office, il est producteur de contenu et média, mais il peut aussi nous aider vraiment à créer une publicité où lui est beaucoup plus, un poisson dans l'eau, dans les codes de la plateforme, dans les styles, il a beaucoup de flexibilité et qui parfois peut vraiment nous aider, nous, les marques. » C'est pour ça que faire appel à eux peut nous permettre d'avoir des contenus parfois plus dynamiques, plus différents de ce qu'on a l'habitude de faire et qui sont vraiment intéressants pour nous. » (**Céline Wildschutz**, Carrefour)*

> *"Soms schrijven we de kleinere influencers aan die mooie content maken. Die kunnen we daarna ook recycleren, nieuw inzetten als advertenties. Dat geeft een breed scala aan mogelijkheden. […] In het beste geval proberen we te cross-posten, zodat het op beide profielen wordt geplaatst, de synergie van die twee*

*doelpublieken. Dan is het interessant voor de profielen die de content maken, want ze zien hun content op ons profiel staan, waarbij ze getagd zijn. Zij hebben de kans om hun volgers te doen groeien en wij ook." (**Bart Van Dyck**, Topbrands)*

*"Er zijn influencers die zelf hun diensten aanbieden en daar hebben wij dan altijd een gesprek mee. Dan bekijken we of hier een opportuniteit ligt en soms leidt dat wel tot iets. Soms is dat ook gewoon win-win. En is daar geen budget bij betrokken.[…] We hebben genoeg voorbeelden van mensen die met ons samengewerkt hebben die niet zo bekend waren en daarna superbekend werden. Hun carrière was gelanceerd, omdat wij heel veel exposure hebben." (**Guy Sablon**, MIVB-STIB)*

INFLUENCERS SHAPE OUR BEHAVIOR AND LIFESTYLE

Next to their commercial impact, influencers also play an important role in shaping our behavior and lifestyle. Through a questionnaire with multiple choices, we aimed to understand just how much they were influenced by influencers, content creators and celebrities on social media. We asked people about various aspects of their lifestyles like exercising more often, eating healthier, changing their fashion style, investing money, picking up new hobbies, game, traveling more, focusing on mental health and even seeking psychological help. 71,2% of people who follow influencers, content creators and/or celebrities online admitted to being influenced to change their lifestyles and behaviors. On average, they selected two out of the options presented. In the table below, the percentages of cases where individuals selected each option can be found.

	16-24	25-39	All
Eat healthier	38%	32,3%	34,3%
Exercise / sport more	44,2%	26,6%	32,9%
Dress differently	28%	18,6%	18,6%
Invest, manage budget	22,5%	16,3%	18,5%
Game	24,5%	15,2%	18,5%
Pay more attention to mental health	21,9%	12,5%	15,9%
Travel	19,6 %	13,8%	15,9%
Start a new hobby	16,2%	10,3%	12,9%
Seek psychological help	14%	11,8%	12,6%

Table 11: Has an influencer, celebrity or content creator ever motivated you to… (in % of cases; N = 4243)

Eating healthier consistently shows one of the highest percentages of influence across all groups, indicating that influencers have a significant impact on motivating people to eat more healthily. In total, 34,3% of respondents indicated they started to eat more healthily due to an influencer, content creator, or celebrity. Exercising more is another area where influencers seem to exhibit considerable influence, with 32,9% of respondents reporting exercising more due to influencer content. Additionally, 18,6% of respondents dresses differently, 18,5% invests or manages their budget, and 18,5% are motivated to game. 15,9% are motivated to travel, and 12,9% to start a new hobby. Furthermore, 15,9% of the respondents pays more attention to their mental health to feel better about themselves, and 12,9% were even motivated to seek psychological help.

"INSTAGRAM GEBRUIK IK OOK WEL MEER, DIT DOORDAT IK HET ZEER LEUK VIND OM MOMENTEN VAST TE LEGGEN EN DEZE TE DELEN MET VRIENDEN. TOEN HET CORONA WAS KON JE NIET VEEL DOEN EN MISTE IK DAT ENORM. SINDSDIEN

BEN IK OOK MEER FOTO'S BEGINNEN NEMEN VAN ALLES EN BEGINNEN GENIETEN VAN DE KLEINE DINGEN EN DEZE DEEL IK DAN OOK VAAK OP INSTAGRAM. OOK REELS FITNESS GERELATEERD OF ROND PSYCHOLOGIE VIND IK OOK ALTIJD LEUK OM TE KIJKEN VIA INSTAGRAM OP VRIJE MOMENTEN." (***WOMAN***, 21 Y.O.)

In general, younger individuals (16-24) are more influenced across most categories compared to the older age group (25-39). Also, women tend to be more influenced across several categories compared to men. For instance, they show higher percentages in areas like eating healthier, dressing differently, and paying attention to mental health. Men, on the other hand, are more influenced in gaming and investing or managing their budget. To conclude, French-speaking individuals generally exhibit higher percentages of being influenced across various categories compared to Dutch-speaking individuals, regardless of age groups. This suggests that French-speaking individuals may be more susceptible to the influence of influencers, content creators, and celebrities on social media when it comes to shaping their behaviors and lifestyles. In the tables below, the percentages of cases where individuals selected each option can be found. The option 'nothing in particular' couldn't be combined with other choices.

	Men			**Women**		
	16-24	**25-39**	**Total**	**16-24**	**25-39**	**Total**
Eat healthier	35,5%	34%	34,6%	41,1%	30,6%	34,3%
Exercise / sport more	49,5%	30,1%	37,2%	39,2%	23,3%	28,9%
Dress differently	18,8%	12,0%	14,4%	37%	14,6%	22,5%
Invest, manage budget	24,7%	21,1%	22,4%	20,7%	11,6%	14,8%
Game	36,4%	23,9%	28,5%	12,3%	6,6%	8,6%
Pay more attention to mental health	16,8%	9%	11,9%	27%	15,7%	19,7%
Travel	13,5%	13,1%	13,3%	25,8%	14,5%	18,5%
Start a new hobby	12,3%	11,8%	12,0%	19,8%	10,3%	13,7%
Seek psychological help	12,3%	14,9%	14,0%	15,7%	8,6%	11,1%
Other	1,3%	0,7%	0,9%	1,3%	1,1%	1,1%
Nothing in particular	12,9%	28,9%	23,1%	20,7%	42,1%	34,5%

Table 12: Has an influencer, celebrity or content creator ever motivated you to… (in % of cases) – gender x age group(N=4243)

	Dutch			French		
	16-24	**25-39**	**Total**	**16-24**	**25-39**	**Total**
Eat healthier	36,6%	29,1%	31,7%	39,7%	36,4%	37,6%
Exercise / sport more	40,3%	23,5%	29,4%	49,1%	30,6%	37,4%
Dress differently	23,7%	10,1%	14,9%	33,2%	17,7%	23,4%
Invest, manage budget	19,4%	15,0%	16,5%	26,3%	18,0%	21,0%
Game	19,9%	13,2%	15,6%	30,2%	17,7%	22,3%
Pay more attention to mental health	23,2%	11,4%	15,6%	20,3%	14,0%	16,3%
Travel	14,7%	11,1%	12,4%	25,6%	17,2%	20,3%
Start a new hobby	13,4%	11,0%	11,8%	19,7%	11,1%	14,3%
Seek psychological help	13,0%	11,0%	11,7%	15,3%	12,9%	13,8%
Other	1,3%	0,8%	1,0%	1,4%	1,0%	1,2%
Nothing in particular	20,9%	41,6%	34,3%	11,6%	27,6%	21,7%

Table 13: Has an influencer, celebrity or content creator ever motivated you to… (in % of cases) – language group x age group (N = 4243)

WHAT'S IN A NAME? PERCEPTIONS OF INFLUENCERS, CONTENT CREATORS AND CELEBRITIES

As social media platforms evolved into lucrative marketing channels, various influential personas emerged, including influencers, celebrities, and content creators. While studies have compared influencers to traditional celebrities[5], the role of content creators has largely been overlooked. The term 'content creator' is often considered a more dignified name for an influencer, yet there seem to be subtle differences. While emphasis is typically placed on influencers' expansive follower counts and their impact on purchasing decisions[6], content creators are often depicted as prioritizing autonomous content generation over the commercial aspects commonly associated with influencers.

Despite the proliferation of these conceptual distinctions, research examining consumer perceptions of various social media personalities is notably lacking. Therefore, we aimed to investigate the discerning characteristics defining celebrities, influencers, and content creators. For each type, respondents who follow an influencer (N=1915), a content creator (N=1977), and/or a celebrity (N=2051) on social media needed to assign to what degree each characteristic fits the type of media personality on a 5 point scale. This led to 835 participants who follow all three types.

In summary[7], content creators score highest with regards to creativity, reacting to comments and resembling followers. They are the least associated with having many followers. Celebrities are least associated with fun, original, creative and high quality content, and being able to teach followers something. They resemble followers least and react least to comments but are also linked least to advertising. Celebrities are most assigned with having a special talent, being someone to look up to, being attractive, and showing an ideal image of what life can be like. Influencers also fit better with a large following and are more attractive

[6] *e.g., Schouten, Janssen, and Verspaget 2019; Gräve and Bartsch 2022*

[7] *Jiménez-Castillo, and Sánchez-Fernández 2019; Haenlein et al. 2020*

[8] *A repeated measures ANOVA revealed a significant two-way interaction (F(20.93,17459.17)=67.42,p<.001,ηp2=.075, power=1.00). All characteristics differed significantly between the different social media types. More details about the analysis can be provided upon request. The analysis was carried out by dr. Serena D'Hooge – Rotterdam School of Management.*

compared to content creators, while they are assigned more to posting fun, original and creative content, being able to teach followers something and reacting to comments compared to celebrities. Influencers fit best with advertising, and being sponsored by brands, and are perceived as the least credible.

According to the young people we spoke with:

"UN INFLUENCEUR C'EST QUELQU'UN QUI A BEAUCOUP D'ABONNÉS ET QUI GAGNE DE L'ARGENT EN FAISANT LA PROMOTION DE PRODUIT. ...LES INFLUENCEURS SONT CEUX QUE L'ON SUIT UNIQUEMENT POUR LEUR LIFESTYLE ET QUI VIVENT DES RÉSEAUX SOCIAUX PAR EXEMPLE UN ACTEUR OU UN CHANTEUR N'EST PAS UN INFLUENCEUR POUR MOI PARCE QU'IL GAGNE SON ARGENT SUR SES FILMS OU SA MUSIQUE." (***WOMAN***, 24 Y.O.)

"INFLUENCERS WORDEN VOORAL BETAALD OM DINGEN TE PROMOTEN EN ZIJN HEEL BEKEND, HEBBEN VEEL VOLGERS. HET IS DAN OOK ECHT HUN BEROEP. CONTENTCREATORS DAARENTEGEN MAKEN GEWOON LEUKE CONTENT EN MAKEN HIER NIET HUN JOB VAN. ZIJ KUNNEN OOK MINDER VOLGERS HEBBEN EN DAT MAAKT HUN DAN OOK NIET ZO VEEL UIT." (***WOMAN***, 16 Y.O.)

We also gauged for brands' social media professionals' opinion on if and how they think influencers, content creators and celebrities differ from each other. Summarized, content creators, particularly on platforms like TikTok, are often individuals who produce content based on their genuine interests or simply for enjoyment, making them the most authentic. Influencers, on the other hand, are typically more established individuals with a substantial following. They often promote various brands, sometimes switching between competitors, demonstrating a level of routine in their endorsements. The distinction between influencers and content creators lies in the added value that content creators bring. Content creators not only understand their audience well but also provide a creative touch to their content, aligning it with the brand's identity. They strive to produce engaging content tailored to their audience's preferences, which sets them apart from traditional influencers who used to simply showcase products without much creativity.

> *"Ik denk dat contentcreators, vooral op TikTok, vaak mensen zijn die inderdaad iets maken wat ligt binnen hun interesseveld of omdat ze het leuk vinden. Niet om bekend te worden, dus dat maakt hen nog altijd het authentiekst. Het zijn vaak de jongeren die pas beginnen die niet weten wat ze waard zijn en daardoor zijn dus ook hun fees nog heel laag. Zij moeten ook wel oppassen dat ze niet door merken misbruikt worden. Influencers zijn geroutineerde mensen met een hoog aantal followers, al dan niet gekocht. Zij promoten de ene week merk a en de andere week concurrent merk b.*
> *Wij proberen echt te zoeken naar fans van onze specifieke merken of specifieke verhalen. Dit kunnen bekende mensen zijn, content creators en influencers en wij proberen daar een goede mix van te maken. Je ziet wel verschil in de soorten content, maar ik denk dat de mix interessant is. Want ieder heeft andere followers en een andere aanpak." (**Amaury Van Kenhove**, Disney)*
>
> *"De contentcreator komt met een meerwaarde, die voegt iets toe, die kent ook heel goed het publiek. Een influencer kent dat ook, maar er is iets extra. Een influencer showt gewoon een product en dat is redelijk basis voor mij, terwijl de content creator is voor mij iemand die daar een creatieve meerwaarde aan geeft. Hun persoonlijkheid moet matchen met uw DNA als merk. Content creators gaan creatief meedenken om die match te maken, terwijl een traditionele influencer van vroeger, gaat gewoon dat product tonen (zo simpel was het vroeger), terwijl een content creator gaat nadenken, want die wil ook vooral goede content maken voor zijn doelpubliek. Dat is ook een beetje gevoel. Dat is voor mij het grote verschil." (**Guy Sablon**, MIVB – STIB)*

Celebrities have often gained their fame outside of social media. When working with them, additional sup-

port may be needed to create content that fits their image and resonates with their audience. Celebrities may have limited time and prefer clear instructions on what to post, requiring more hands-on guidance and customization to ensure authenticity and effectiveness.

> *"Je hebt ook mensen die een andere job hebben - acteur, atleet - en die eigenlijk bijna, bij wijze van spreken, niet weten hoe ze iets moeten posten of delen op Instagram of op TikTok. Die moeten we wel meer bij de hand houden, die zijn niet direct pro's in het gebruik van social media en daar kruipt soms heel veel tijd in de opvolging. Het kan dan zijn dat we samen met hen die post gaan maken, of dat we dat echt wel een beetje meer voorkauwen. Celebrity influencers hebben vaak ook heel weinig tijd. Die vragen soms gewoon: "maak het mij zo concreet mogelijk, zeg mij wat ik moet posten". Wij gaan dan wel altijd kijken naar hun profiel en we proberen dat een beetje te tweaken, zodat het wel past in hun content. Want hoe geloofwaardiger, hoe meer impact we gaan hebben." (**Elke De Mayer,** Wavemakers)*

THE RISE OF VIRTUAL INFLUENCERS

Among respondents, 43,4% are familiar with these digital personas, with 17,1% actively following them on social media platforms, predominantly Instagram and TikTok. There are no notable differences among young people and +25-year-olds (resp. 44% vs. 43,1% and 17,9% vs. 16,6%). Among French-speaking Belgians, the percentage of respondents who follow influencers is slightly higher (18,2%) compared to Dutch-speakers (16,2%). Men are more acquainted with virtual influencers compared to women (48,7% vs. 38%) and also show a higher inclination to follow them (22,9% vs. 11%).

Interestingly, 70,1% emphasizes the importance of transparent disclosure regarding the virtual nature of influencers, underscoring a desire for clarity. This is even more important to +25-year-olds. While 23,5% see value in brands integrating virtual influencers into their marketing strategies, a notable 34,6% perceives such initiatives as innovative, and even 53% of young people. However, a significant proportion (53,5%) expresses scepticism, viewing brand endorsements from virtual influencers as lacking in authenticity, in particular older age groups. More details can be found in the following table.

	16-24	25-39	ALL
I find it important that it is clearly indicated when an influencer is virtual and therefore not real.	65,9%	72,4%	70,1%
I believe it's a good idea for brands to use virtual influencers in their marketing strategy.	24,8%	22,8%	23,5%
In my opinion, brands using virtual influencers in their marketing strategy are innovative.	53,0%	34,2%	34,6%
In my opinion, brand recommendations from virtual influencers are not authentic.	47,0%	57,0%	53,5%

Table 14: Attitudes towards virtual influencers (in % of respondents that agrees or totally agrees with the statement; N = 4494)

Brands we've spoken with don't seem particularly concerned about virtual influencers at the moment. They view them more as a gimmick, perhaps a way to garner attention and reach, but not as a means to convey a brand message in an authentic way. Most do closely monitor the advancements in virtual and AI-generated influencers, remaining receptive to potential opportunities that align with their objectives.

> *"Daar moet ik eerlijk over zijn en dat is echt onontgonnen gebied voor ons. Daar is ook nog geen enkele interne richtlijn voor." (**Amaury Van Kenhove,** Disney)*

> *"Ik denk dat we daar nog niet klaar voor zijn. Lijkt me ook nog heel niche communicatie. Europa hoort op dat vlak vaak niet bij de early adopters , en in België verwacht ik dergelijke influencers zeker niet onmiddellijk." (**Sven Dhollander**, E5)*
>
> *"Op dit moment zijn er - bij mijn weten - binnen België en Nederland geen virtuele influencers die specifiek in ons segment zitten. Moest er zo iemand zijn en die heeft goede statistieken, engagement én de juiste doelgroep, dan zou ik niet inzien waarom we daar ook niet mee zouden kunnen samenwerken." (**Sylvie Verrept**, QLEVR)*

Podcasts

KEY INSIGHTS

- **Over half (54,8%) of Belgians aged 16 to 39 listen to podcasts, with 39,2% doing so weekly and 20,2% daily. Notably, younger age groups exhibit higher rates of podcast consumption to those aged 25-39.**
- **Male listeners outweigh female listeners, with males showing higher engagement levels across age groups.**
- **Spotify and YouTube emerge as the most popular platforms among regular podcast listeners.**
- **Approximately 67,7% of Belgians up to 39 use Spotify at least once a month, with 46,1% engaging with the platform daily.**
- **Podcasts present promising opportunities for brands, with a significant proportion of listeners encountering brands during podcast consumption. Moreover, a notable percentage of listeners have sought more information about brands and made purchases due to podcast exposure.**
- **Podcasts exert influence beyond entertainment, motivating listeners to adopt healthier habits, manage finances, and prioritize mental well-being. Younger age groups, especially those aged 16-24, demonstrate higher receptivity to podcast influence across various lifestyle categories.**
- **French-speaking individuals exhibit consistently higher levels of influence across various podcast-related metrics compared to Dutch-speaking individuals, regardless of age groups.**

MORE THAN HALF OF THE BELGIANS LISTENS TO PODCASTS, MOSTLY ON SPOTIFY

54,8% (+1,3%) of the Belgians aged 16 to 39, listen to podcasts, of which 39,2% (+2%) weekly and 20,2% even daily. Among 16-24-year-olds, the percentage of podcast listeners has risen with 4%, among +25-year-olds there is a status quo. Males are clearly heavier podcast listeners compared to females. In the following table, more details about the Belgian podcast listeners are presented:

	16-24		25-39		ALL	
	Monthly	Daily	Monthly	Daily	Monthly	Daily
Male	57,2%	22,8%	63,5%	28%	61,3%	26,2%
Female	53,7%	14%	45,4%	14,3%	48,3%	14,2%
Dutch	54,4%	16%	53,6%	21,4%	53,8%	19,6%
French	56,4%	21,2%	56%	21%	56,1%	21,1%
All	55,3%	18,3%	54,6%	21,2%	54,8%	20,2%

Table 15: Podcast listeners in Belgium (in %, N=4516)

The most popular platforms among regular podcast listeners (at least monthly) to do so are Spotify and YouTube. In the table below, the percentages of cases where regular listeners selected each platform can be found.

	16-24	25-39	All
Spotify	66%	57,9%	60,8%
YouTube	4,4%	52,3%	49,9%
Apple podcasts	9,3%	10,3%	9,9%
Google	3,5%	6,2%	5,2%
Stitcher	4%	5%	4,7%
Podimo	7,2%	8,8%	8,2%
Other	4,9 %	5,2%	5,1%

Table 16: Preferred platforms among regular podcast listeners (in % of cases, N=2477)

As Spotify is an important platform for podcasts, we gauged for how often young Belgians use Spotify in general. Approximately 67,7% of the Belgians up to 39 uses Spotify at least once a month (16-24: 78%; 25-39: 62,1%), and 46,1% on a daily basis (16-24: 60,9%; 25-39: 38,2%). These figures are more or less the same as last year.

Furthermore, we asked frequent Spotify users (at least once a week), how often they used Spotify playlists and Spotify podcasts. It appears that in particular playlists are used regularly. 81,4% of the 16-24-year-old and 66,2% of the 25-39-year-old regular podcast listeners uses the feature at least daily. The podcast feature is used less frequently among both age groups (16-24: 23,7%; 25-39: 33,2%). Among 16-24-year-olds, this means an increase of 5,8% compared to last year (+2,9% among 25-39).

THE POWER OF PODCASTS FOR MARKETING

74,2% of the Belgian podcast listeners aged 16 to 39 encounters brands at least sometimes while listening, 39,1% often or daily.

Among listeners, 30,7% (+4,4%; 16-24: 28,7%; 25-39: 31,9%) believes it's a good idea for brands to cooperate with existing podcasts and 35% (+1,9%; 16-24: 39,4; 25-39: 32,6%) believes it's a good idea for brands to create their own podcast. 27,2% explicitly states it's not a good idea for brands to incorporate podcasting in brands' marketing strategies, while 11% (-4,5%) is not sure on this matter.

Podcasts appear to be a promising platform for brands, as 34,7% (+2,3%) of the people who listen to podcasts looked for more information about a brand due to a podcast and 29 (+2,4%) admits to have bought a product or service due to a podcast in the past three months. An impressive 41,6% of podcast listeners became acquainted with a product, service or brand through a podcast in the past 3 months. Interestingly, as presented in the table below, podcasts seem to have a larger commercial impact on men compared to women.

Brands recognize the potential of podcasts as a growing medium and acknowledge certain advantages associated with it. Podcasts are viewed as a powerful medium for storytelling, offering brands a unique platform to engage with their audience on a deeper level. Additionally, sponsoring a podcast provides brands with extended and more attentive exposure compared to many other forms of advertising. Although brands see podcasts as a strategic opportunity to connect with their target audience in a meaningful way, they are still hesitant due to the challenges associated with this medium. These challenges include the significant time and resources required to produce high-quality podcasts. Also, brands are in doubt about sponsoring a podcast and how to find a good match. Moreover, there is uncertainty on the return on investment, especially compared to other forms of content.

> *"Er komt heel wat kijken bij zo'n podcast. Je hebt materiaal nodig, een setting en iemand die zo'n gesprek kan leiden. Dat is allemaal niet zo evident en iets dat je op 1-2-3 kan opbouwen." (**Robby Bleys,** Jysk)*

> *"Om heel eerlijk te zijn vind ik een podcast veel werk voor een resultaat dat voor ons toch niet zo wauw was. Het aantal luisteraars van de podcasts was niet slecht, maar als je het vergelijkt met het bereik dat we hebben op andere sociale media en andere vormen van content, is dat toch veel lager. Natuurlijk, de groep die je bereikt, is wel kwalitatief en het zijn mensen die het echt luisteren." (**Guy Sablon,** MIVB-STIB)*

> *"Podcast is storytelling en we hebben heel sterke stories te vertellen, zoals we nu al doen. De prioriteit is om in eerste instantie de kwaliteit te halen van de voorgaande jaren, via de kanalen waarvan we weten dat ze werken. De vraag is altijd, als je dat erbij doet: wat is de relatie inspanning-return? Zo eenvoudig is het eigenlijk." (**Peter Van Craenenbroeck,** Mucovereniging)*

Unlike visual media that dominate today's landscape, podcasts rely solely on audio. This audio-only format can pose a challenge for brands accustomed to communicating visually. The absence of visual elements means that brands must find creative ways to captivate their audience and convey their message effectively through sound alone.

> *"Wij focussen vooral op video, want de klanten willen onze producten vaak ook zien. In de video's demonstreren we het product, we laten een review zien en we delen onze mening. Ze zien dan het product en dat is een meerwaarde, denk ik. In een podcast kan dat niet." (**Michelle Verbruggen,** Krëfel)*

PODCASTS AS A SOURCE OF INSPIRATION AND MOTIVATION

In addition to their entertainment value, podcasts are powerful in shaping various aspects of listeners' lives.

Covering a range of lifestyle choices, from health and finance to leisure activities and mental well-being, respondents were asked whether podcasts had ever inspired them to take action. The results reveal a significant impact, with 31,8% of all podcast listeners reporting that podcasts have motivated them to eat healthier, while 27,1% engages in sports or exercising more frequently. Financial matters also saw influence, with 19,6% indicating that podcasts motivated them to invest or manage their budget better. Furthermore, podcasts played a role in addressing mental health concerns, with 17,4% expressing a willingness to seek psychological help (remarkably higher compared to the impact of influencers, content creators and celebrities) and 15,9% admitting to pay more attention to their mental health based on podcast content. Leisure activities such as gaming, traveling and starting a new hobby also saw notable influence, with 16,3%, 10,4% and 11,7% respectively. Additionally, podcasts have sparked interest in personal appearance, with 12% admitting to dress differently. Interestingly, 'travel' and 'dress differently' score lower compared to the impact of influencers, content creators and celebrities. This is probably due to the more visual nature of these lifestyle aspects. Remarkably, younger age groups, particularly those between 16-24,

showed higher receptivity to podcast influence across various categories.

	16-24	25-39	All
Eat healthier	28,6%	33,5%	31,8%
Exercise / sport more	30%	25,5%	27,1%
Invest, manage budget	18,8%	20%	19,6%
Seek psychological help	19,4%	16,3%	17,4%
Game	14,1%	17,5%	16,3%
Pay more attention to mental health	19,8%	13,8%	15,9%
Dress differently	10,8%	12,7%	12%
Start a new hobby	12%	11,5%	11,7%
Travel	10,8%	10,2%	10,4%

Table 18: Has a podcast ever motivated you to… (in % of people who listens to podcasts)

"IK GENIET VOORAL VAN PODCASTS OVER PERSOONLIJKE ONTWIKKELING OF WANNEER ZE PERSOONLIJKE VERHALEN VERTELLEN. IK LUISTER NAAR PODCASTS VAN INDIVIDUEN NIET VAN MERKEN. EEN LEUKE PODCAST IS DIE VAN ALIX EARL ZIJ POST WEKELIJKS (ALS IK ME NIET VERGIS) EN DAAR LUISTER IK WEL GRAAG NAAR." (*WOMAN*, 20 Y.O.)

Furthermore, women tend to exhibit greater influence across several categories compared to men, particularly in areas such as adopting healthier eating habits, altering their fashion choices, and prioritizing mental health. Conversely, men show higher levels of influence in specific areas such as gaming and managing finances. This suggests potential differences in the types of content that resonate with different gender groups. Moreover, when comparing language groups, French-speaking individuals consistently exhibit higher percentages of being influenced across various categories compared to Dutch-speaking individuals, irrespective of age groups. This disparity may reflect differing cultural contexts or preferences in media consumption and content engagement. In the tables below, the percentages of cases where individuals selected each option can be found. The option 'nothing in particular' couldn't be combined with other choices.

	Men			Women		
	16-24	**25-39**	**Total**	**16-24**	**25-39**	**Total**
Eat healthier	29,6%	36,2%	34,0%	28,0%	30,0%	29,2%
Exercise / sport more	35,1%	28,1%	30,4%	24,7%	22,0%	23,0%
Invest, manage budget	21,1%	22,9%	22,3%	16,3%	16,1%	16,2%
Seek psychological help	17,9%	18,4%	18,3%	21,4%	13,1%	16,3%
Game	18,9%	22,6%	21,4%	8,8%	9,8%	9,4%
Pay more attention to mental health	13,3%	11,1%	11,8%	27,1%	17,6%	21,2%
Dress differently	9,4%	15,3%	13,4%	12,6%	9,0%	10,4%
Start a new hobby	8,6%	12,9%	11,5%	16,0%	9,3%	11,8%
Travel	10,4%	11,5%	11,1%	11,4%	8,6%	9,7%
Other	2,2%	0,7%	1,2%	1,8%	0,8%	1,2%
Nothing in particular	16,5%	21,9%	20,1%	27,7%	37,6%	33,8%

Table 19: Has a podcast ever motivated you to… (in % of people who listen to podcasts) – gender x age group

	Dutch			French		
	16-24	**25-39**	**Total**	**16-24**	**25-39**	**Total**
Eat healthier	29,7%	33,0%	31,8%	27,3%	34,2%	31,8%
Exercise / sport more	26,8%	24,6%	25,4%	33,8%	26,6%	29,2%
Invest, manage budget	16,6%	21,0%	19,5%	21,5%	18,8%	19,7%
Seek psychological help	19,7%	14,8%	16,5%	19,0%	18,2%	18,5%
Game	12,7%	13,8%	13,4%	15,8%	22,0%	19,8%
Pay more attention to mental health	20,3%	14,1%	16,3%	19,2%	13,5%	15,5%
Dress differently	8,4%	11,4%	10,3%	13,8%	14,2%	14,1%
Start a new hobby	12,4%	10,8%	11,3%	11,6%	12,5%	12,2%
Travel	11,0%	9,1%	9,7%	10,6%	11,6%	11,2%
Other	2,3%	0,8%	1,4%	1,8%	0,8%	1,2%
Nothing in particular	25,6%	32,6%	30,1%	17,6%	23,0%	21,1%

Table 20: Has a podcast ever motivated you to… (in % of people who listen to podcasts) – language group x age group

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We hope that this report will serve as a useful resource for future studies and industry professionals alike.

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