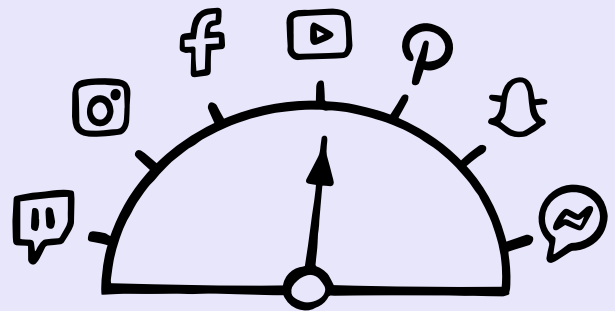


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SMI BARO METER

SOCIAL MEDIA
& INFLUENCER
MARKETING
INSIGHTS

WWW.SMIBAROMETER.BE

2025

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Preface

The Social Media & Influencer Marketing (SMI) Barometer explores how young Belgians (aged 16 to 39) use social media and how they engage with brand communication via social platforms, influencers, and podcasts. The SMI Barometer is a collaboration between Artevelde University of Applied Sciences and Comeos, the Belgian trade federation, and is conducted annually. The study combines academic depth with practical relevance for brands and marketers.

The 2025 edition marks the sixth publication of the SMI Barometer and the fifth to include participants across Belgium. While the first edition (2019) focused exclusively on Flemish youth aged 16 to 24, the scope was expanded in 2021 to include the entire country. In 2023, the age range was broadened to include 16 to 39-year-olds, a scope maintained in the current edition.

For this edition, we surveyed a representative sample of Belgians aged 16 to 39 and conducted six focus groups with Dutch- and French-speaking youth aged 16 to 24. These sessions provided richer insights into their mindset and online behavior through peer interaction. Lastly, we gathered strategic input from marketing professionals via expert interviews with representatives from various retail brands.

To ensure consistency with previous editions, most survey questions were retained. However, several updates were made to reflect new developments in the digital landscape:

1. We replaced individual interviews with focus groups, allowing for richer insights into social and peer dynamics among younger users.
2. We introduced questions around personal use of AI for creating social media content, as well as users' perceptions of AI-generated content by influencers.
3. We included new items on social shopping preferences, providing a clearer picture of how platforms support the full customer journey, from discovery to purchase.

We hope this sixth edition of the SMI Barometer will serve as a valuable resource for researchers, marketers, and brands looking to better understand and respond to the ever-changing digital landscape in Belgium.

Enjoy the read,
Marijke De Veirman, Laurien Desimpelaere & Eveline Mollaert

Artevelde University of Applied Sciences,
May 2025

The logo for 'comeos' is displayed in white lowercase letters on a black, rounded rectangular background.

Time flies – the 5th National Edition of the SMI Barometer!

In today's fast-paced digital landscape, it is essential for the retail sector to stay ahead of the curve.

Social media and influencer marketing are evolving at lightning speed: where and how consumers get inspired is constantly changing. We are seeing an increasing number of **purchases being made directly within social platforms**. This raises important questions: **Where should retailers focus their efforts? How can they strategically navigate these dynamics?**

The **SMI Barometer** provides valuable answers. This research offers a clear overview of how consumers experience and engage with social media and influencers, broken down **by region**: Flanders, Brussels, and Wallonia. This enables retailers to fine-tune their marketing strategies and better align with local preferences and opportunities.

As a federation, we are particularly **proud of our collaboration with academic partners like Arteveldehogeschool**. Through this partnership, we gain objective, scientifically-backed data that provides us with a detailed view of the evolving social media landscape over time. This empowers our members to make informed marketing decisions and connect with target audiences more effectively. It provides insights not only for today but also for the future.

The Barometer also **fosters collaboration** within the sector: retailers, stakeholders, and marketing partners can work together more strategically by sharing these insights.

Moreover, this annual survey serves as a **valuable tool in regional and national policy discussions**, enabling us to advocate for the sector's interests with well-founded arguments.

In short, the SMI Barometer is not only a tool to improve today's performance but also a guide to shaping the retail of tomorrow – data-driven, relevant, and future-focused.

Kristof Delhez

Senior Manager Innovation & Platforms

Comeos

10 Key Insights

1

BELGIANS REMAIN HEAVY SOCIAL MEDIA USERS, WITH SMALL CHANGES COMPARED TO LAST YEAR

Among Belgians aged 16 to 39, WhatsApp now leads in daily usage among Belgians aged 16–39 (71,8%), just ahead of Instagram (69,8%). Facebook (64,2%), YouTube (58,8%), and Messenger (57,0%) complete the top five for daily use.

While these rankings highlight the most-used platforms, there have been some small shifts compared to last year. X shows the sharpest decline in daily use (-3,1%), now at 18,2%. Notably, several brands are also reassessing their presence on X, citing concerns about the platform's direction and safety for brand communication. Additionally, Facebook and Messenger have also experienced declines of 2,9% and 2,1%, respectively. WhatsApp and TikTok were the exceptions, both showing growth with increases of 2,3% and 2,8%, respectively.

2

AGE AND GENDER SHAPE SOCIAL MEDIA HABITS

Social media usage is highly segmented by age and gender. Younger users (16-24) prefer Instagram (83,4% daily use), TikTok (71,5%) and Snapchat (70,7%), while older users (25-39) favor Facebook (75,7%) and WhatsApp (75,2%). There are some remarkable gender differences. Among Belgians aged 16 to 24, YouTube is more popular among males (75% vs. 51,2%), while Instagram (89,3% vs. 77,8%) and TikTok (78,2% vs. 65,9%) among females. Among older (25-39) individuals, Facebook (81,5% vs. 69,7%) and Instagram (68,1% vs. 56,5%) are more popular among females, while YouTube is more popular among males (67,2% vs. 45,4%).

3

WHATSAPP IS BELGIANS' PREFERRED MESSAGING PLATFORM

WhatsApp confirms its role as Belgium's go-to messaging platform, with daily usage steadily increasing from 66,1% in 2023 to 71,8% in 2025, reaching 75,2% among 25–39-year-olds. Messenger continues its steady decline, dropping to 57,0% daily use in 2025. In total, 9 in 10 Belgians aged 16–39 (92,3%) use WhatsApp at least once a month, compared to 82,3% for Messenger. Still, Messenger is more frequently used than WhatsApp among French-speakers.

One of the main reasons frequent social media users in Belgium engage with platforms is to interact with friends and family. WhatsApp and Messenger play a key role here, especially among 25–39-year-olds: over 75% of their frequent users use them to connect with friends, and around 70% to stay in touch with family. Among 16–24-year-olds, WhatsApp is still widely used for communication with family (67,6%) and friends (61,8%), while Messenger follows closely. In contrast, younger users turn to Instagram and Snapchat primarily for peer interaction. 64,8% and 68,5% of frequent users aged 16–24 use these platforms to connect with friends, but only around 30% use them to stay in touch with family.

4

YOUNG BELGIANS INCREASINGLY UNDERTAKE MEASURES TO LIMIT THEIR SOCIAL MEDIA BEHAVIOR

With an increase of 4,4% compared to last year (74,8%), Belgians aged 16 to 39 have never taken

more steps to limit their social media use than they do now. They take actions such as deleting apps, turning off notifications, and setting screen time limits. Particularly younger individuals and men tend to be more proactive in managing their social media consumption. Focus groups with young people reveal a range of reasons behind this behavior. Participants mention the desire to avoid the “wormhole” effect, concerns about negative effects on their mental well-being, and the relentless pull of addictive scrolling. At the same time, a paradox emerges between their attitudes toward social media and their real behavior. While many of them describe social media as highly addictive, especially TikTok being frequently mentioned, their social media usage remains very heavy.



INSTAGRAM DOMINATES BRAND INTERACTIONS

Overall, Instagram stands out as the leading platform for brand interactions. For instance, 59,6% of the Instagram users discover brands through the platform, with an even much higher percentage among 16-24-year olds (63,8%). The platform also excels in other areas, such as information search, product purchases, website redirection, and product recommendations.

TikTok is also emerging as an important platform for brand interactions, with 51,2% of its users indicating that they have discovered brands through the app, and 35,3% having searched for brand information. The platform is especially significant for younger users (resp. 57,5% - 38,0%). Facebook, by contrast, remains relevant for brand discovery and brand information search, especially among older individuals (44,0% and 31,1% of Facebook users aged 25-39, respectively). YouTube also scores high in terms of brand interactions, particularly in the area of brand discovery (40,8%)



EXTERNAL LINKS PREFERRED FOR SOCIAL SHOPPING

In Belgium, social shopping is primarily driven by external links, with 31,8% of users preferring a direct link to a product page and 15,6% opting to visit the brand’s broader webshop. Additionally, around one in five users prefer to leave the social platform altogether to search for the brand or product via a browser or search engine. 20,5% of those visiting webshops search by SKU.



SUPPORT FOR BRANDS USING INFLUENCERS DECLINES, BUT THEIR IMPACT ON CONSUMER BEHAVIOR REMAINS STRONG

The share of Belgians aged 16 to 39 who view the commercial use of influencers positively has dropped significantly (- 11,4%) to just 58,5%. This decline was also noted in the focus groups, where some participants expressed that excessive advertising reduces the credibility of influencers and criticized brand partnerships involving poorly matched products.

However, influencer marketing continues to deliver strong results, particularly in terms of conversion. 47,2% have discovered products through influencer content, 43,1% have searched for brand information after seeing a post, 32,5% have started following a brand, and 28,9% have made a purchase in the past three months based on an influencer’s recommendation. Younger audiences (16-24), are more susceptible to these effects, with higher percentages for brand discovery (57,3%), brand following (38,0%), brand information lookup (51,1%), and purchasing based on influencers’ recommendations (34,3%).

This creates a paradox: while support for brands using influencers is declining, its ability to influence consumer behavior, especially among younger audiences, remains robust.



GROWING AWARENESS OF VIRTUAL INFLUENCERS, BUT TRUST AND TRANSPARENCY CONCERNS PERSIST

More Belgians (16-39) are aware of the concept of virtual influencers compared to last year, with 47,2% reporting familiarity (+3,8%). Additionally, 15,1% actually follow at least one virtual influencer. Men are generally more familiar with virtual influencers than women (53,8% vs. 40,6%), and a higher percentage of men follow virtual influencers compared to women (19,9% vs. 10,3%).

However, concerns surrounding their authenticity, transparency, and brand use persist. Focus group participants expressed unease and distrust when engaging with digital personas. At the same time, there is strong demand for transparency, with 74,2% emphasizing the importance of clear disclosure when an influencer is virtual. Moreover, only 20,9% support the use of virtual influencers in brand communication. The interviewed retailers also show some reluctance to incorporate virtual influencers in their marketing strategies. They value influencer marketing for its human, relatable connection, which they believe to be difficult to achieve with virtual influencers.



SPOTIFY AS PRIMARY PODCAST PLATFORM

Podcast listening is becoming more common, with 20,9% of listeners tuning in daily and 40,8% weekly. Men and French-speaking individuals are notably heavier podcast listeners. Spotify leads as the top podcast platform, used by 60,4% of regular podcast listeners. However, some youngsters in the focus groups highlighted YouTube's unique audio-video combination.

In addition, a significant 78,9% of podcast listeners are exposed to brands, marking a 4,7% increase from the previous year. The interviewed retailers recognize the potential of podcasts for brand storytelling, but also acknowledge the strategic challenges of the format.



AI-ASSISTED CONTENT CREATION IS GAINING TRACTION ON SOCIAL MEDIA

AI is becoming integrated into social media use, with 4 out of 10 users having shared content created with the help of AI. Among these, 16,3% have utilized AI for video production, 15,0% for writing text (such as captions), 14,1% for generating images, and 3,2% for audio content. Younger users are particularly active in AI-assisted content creation, with 44,1% of those aged 16-24 using it, compared to 34,0% of those aged 25-39. Men are more likely to use AI for content creation, with 48,2% having generated images, videos, text, or audio, while only 27,6% of women have done so.

Among those who follow influencers, content creators or celebrities, 36,4% have come across AI-generated posts from these personas, while 27,5% are unsure whether they have seen such posts.

Methodology

Research question & outline of the studies

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?’

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 2024 and January 2025. 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 November 2024 and February 2025, we conducted six focus groups with Dutch- and French-speaking young people aged 16 to 24. These participants were recruited from a college and high schools in Brussels and Flanders. The age range was divided into two groups: 16 to 18 and 19 to 24. Each focus group consisted of 3 to 8 participants, resulting in a total of 48 participants. The interviews aimed to explore participants’ personal use and experience of social media and podcasts, as well as their perceptions of branding and influencer marketing on these platforms. Where relevant, we have included quotes from the focus groups to provide deeper insight into the quantitative findings.

IN-DEPTH INTERVIEWS WITH BELGIAN RETAIL BRANDS

From November 2024 to February 2025, we conducted 10 interviews with (digital) marketing managers representing various retail brands and organizations in depth. These brands were: Colruyt Group, Etam, Famiflora, Just Russel, Lidl, Play Media, Standaard Boekhandel, Studio 100, Toerisme Oostende, and Wondr. Interviews were conducted via videocall and transcribed using Amberscript. The goal of these interviews was to gain insight into how brands currently use social media, influencers, and podcasts in their communication strategies — how they reach their target audiences, and how they view current and emerging trends in the digital landscape. Where relevant, we have included quotes from these retailers to provide deeper insight into the quantitative findings.

WEIGHTING

To ensure a representative sample of the Belgian population aged 16 to 39, we applied weighting¹ 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.

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

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. 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 – 2025

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 25 to 39 age group in the 2023 edition. Therefore, we examined the evolution of trends in Belgium from 2021 to 2025, focusing on age groups 16 to 24 in 2021 (N = 3263) and 2022 (N = 3291), expanding to include the 16 to 39 age group in 2023 (N = 5663), 2024 (N = 4516) and 2025 (N = 4715). In Flanders (16-24), 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.

Sample description

AGE

The target group of this survey is Belgians between the ages of 16 and 39. The mean age of the 4715 participants is 27,9 years (SD = 6,8). As previous research shows that social media use may significantly differ across age groups, we considered differences between young people (16-24 years, N = 1956) and adults (25-39 years, N = 2759).

GENDER

49,2% females (N = 2319; 16-24: 802, 25-39: 1517) and 49,8 % males (N = 2350; 16-24: 835, 25-39: 1515) participated in the online survey. 28 participants (0,6%) indicated to be genderqueer. 18 participants indicated 'other' or 'I prefer not to share my gender' (0,4%).

GEOGRAPHICAL DISTRIBUTION

54,4 % of the sample was Dutch-speaking (N = 2567; 16-24: 922, 25-39: 1645); and 45,6% French-speaking (N = 2148; 16-24: 746, 25-39: 1402). Figure 1 shows the distribution of participants across the regions in Belgium. Table 1 provides more details about the regional and age distribution.

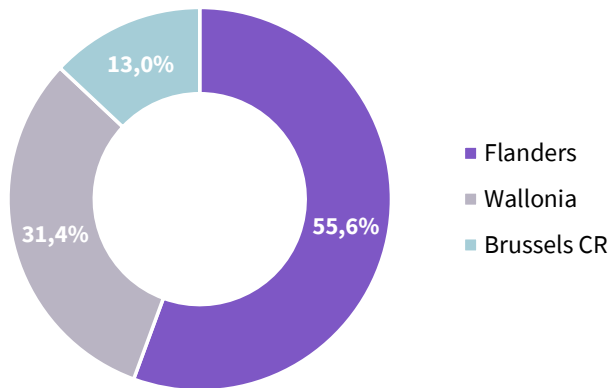


Figure 1: Distribution of participants across region (N = 4715)

| | Flanders | Wallonia | Brussels CR | Total |
|--------------|-------------|-------------|-------------|-------------|
| 16-24 years | 926 | 548 | 193 | 1667 |
| 25-39 years | 1696 | 931 | 421 | 3048 |
| Total | 2622 | 1479 | 614 | 4715 |

Table 1: Distribution of participants across region and age group.

EDUCATION AND EMPLOYMENT

At the time of the survey, 57,0% worked at least part-time (N = 2689), either in paid employment (52,5%) or self-employed (4,5%). 30,6% (N = 1441) of the participants were enrolled at least part-time in a school. Table 2 provides an overview of which studies these participants were enrolled in at the time of survey. Other participants (N = 3274) were asked to indicate their level of education, which is presented in Table 3.

| | |
|--|-------|
| General secondary education | 19,5% |
| Technical secondary education | 10,3% |
| Vocational secondary education | 9,9% |
| Art secondary education | 1,3% |
| Bachelor's studies or short-cycle tertiary education | 40,0% |
| Master's studies | 12,0% |
| Other | 6,9% |

Table 2: Overview education of participants enrolled at least part-time in a school (N = 1441).

| | |
|--|-------|
| Primary education or none | 2,6% |
| Lower secondary education | 8,9% |
| Upper secondary education | 31,8% |
| Bachelor's studies or short-cycle tertiary education | 32,0% |
| Master's or doctoral studies | 24,3% |
| Unknown | 0,4% |

Table 3: Overview level of graduated participants' education level (N = 3274).

Social media use



KEY INSIGHTS

- WhatsApp leads in daily usage overall, with 71,8% of Belgians aged 16–39 using it every day. While primarily a messaging app, it has now overtaken Instagram in daily reach compared to last year.
- Among 16–24-year-olds, Instagram remains the most used social media platform, with 83,4% using it daily. TikTok and Snapchat complete the top three for this age group.
- For older people (25-39), Facebook remains the dominant platform, with a daily usage rate of 75,7%. WhatsApp follows closely at a daily usage rate of 75,2%.
- While there are clear generational differences in social media usage, with for instance, Facebook being more used by older age groups, and Snapchat and TikTok being more consulted by younger age groups, X and YouTube usage remain relatively constant across all included age groups.
- Gender differences exist in social media usage too, with women showing higher daily usage percentages for Facebook, Instagram and Messenger, and men preferring platforms like X, YouTube, and niche platforms like Twitch, Discord, Telegram, Reddit, and Strava.
- Social media usage differs between Dutch- and French-speaking Belgians, especially for audio/video and communication channels.
- More than 7 out of 10 undertake actions to limit social media usage, with more men and younger people doing so. Deleting apps and turning off notifications are the most popular methods.
- Using AI for social media content has already become common. Nearly 4 in 10 people have posted AI-generated content on social media, with the percentage being even higher among men, nearly half of whom have used it.

ACTIVE SOCIAL MEDIA USE

In general, WhatsApp leads in daily usage, with 71,8% users engaging with it on a daily basis – an increase of 2,3% compared to last year. Instagram follows closely, with a daily usage rate of 69,8%. Compared to last year, WhatsApp has overtaken Instagram in popularity and now holds the top spot. Facebook rounds out the top three, with 64,2% using the platform daily.

There are however generational differences in social media usage. Looking at **individuals aged 16 to 24**, Instagram remains the most commonly utilized social media platform, with 83,4% using it daily and 94,0% monthly. This marks a small increase compared to last year (+1,6%). TikTok and Snapchat complete the top 3 (respectively 71,5% and 70,7% for daily usage). These numbers remain relatively stable compared to last year, and the top three platforms remain unchanged. When looking at monthly social media usage, the top 3 looks a bit different: Instagram (94,0%), YouTube (93,7%), and WhatsApp (91,4%).

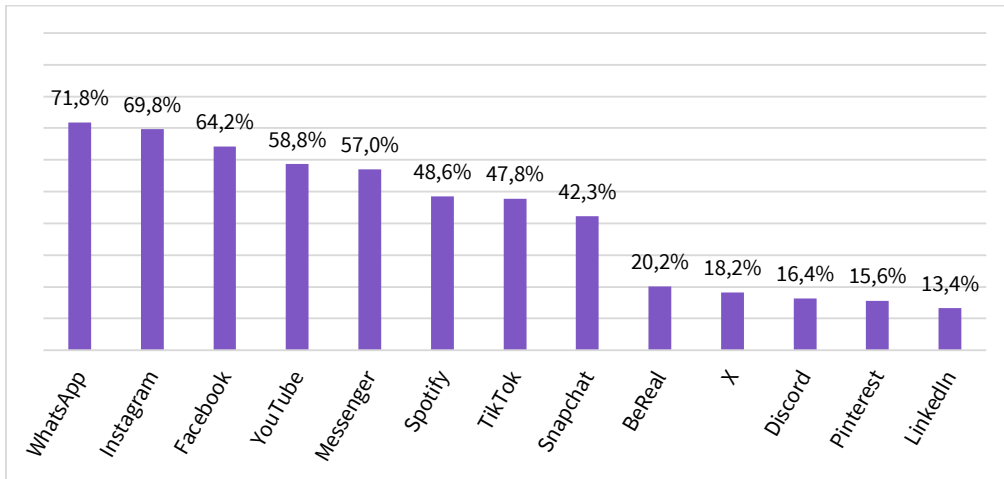


Figure 2: Daily social media use among Belgian people between 16 and 39 (the top 15 most used social media channels; N = 4715).

Among **individuals aged 25 to 39**, Facebook remains the dominant platform, with a daily usage rate of 75,7%, though this reflects a slight decline of 1,8% compared to last year. WhatsApp sees a similar daily usage rate at 75,2%, while Messenger and Instagram follow with 62,7% and 62,3%, respectively. However, when looking at monthly usage, the rankings shift, forming a new top 3: WhatsApp (92,8%), YouTube (90,9%), and Facebook (90,3%).

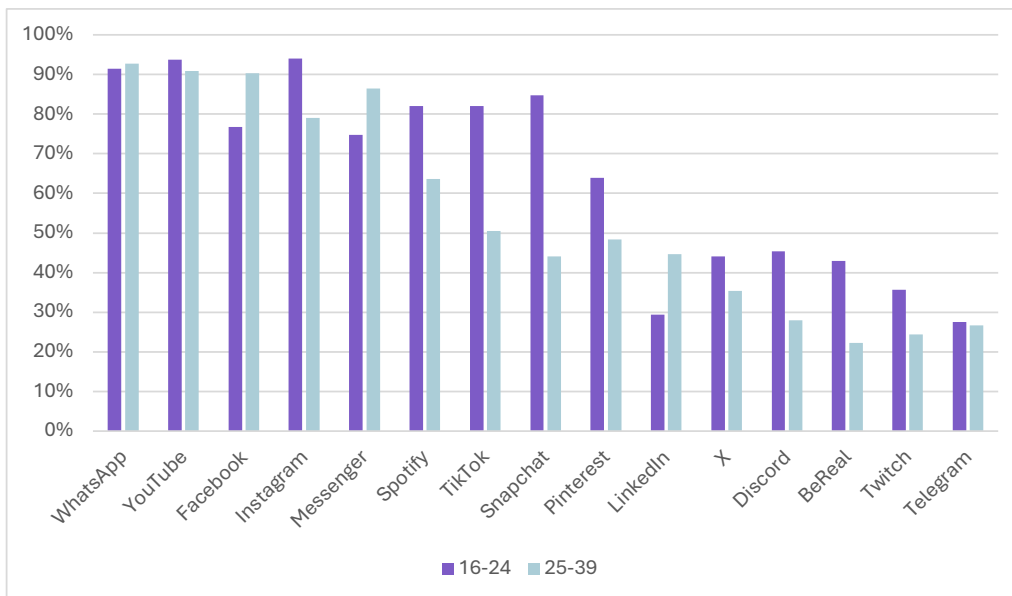


Figure 3: Monthly social media usage according to age group (the top 15 most used social media channels; N = 4715).

Table 4 details social media usage among young adults (16-24) and those 25 and older, revealing a clear generational divide. Younger users favor Instagram and TikTok, while older users prefer Facebook and WhatsApp. Snapchat, BeReal, and Spotify also see significantly higher engagement among younger users. Across all age groups, WhatsApp and YouTube have the highest monthly usage, highlighting their consistent cross-generational appeal.

| | 16-24 | | 25-39 | | Total | |
|------------------|-------|---------|-------|---------|-------|---------|
| | Daily | Monthly | Daily | Monthly | Daily | Monthly |
| Facebook | 43,4% | 76,8% | 75,7% | 90,3% | 64,2% | 85,6% |
| Instagram | 83,4% | 94,0% | 62,3% | 79,1% | 69,8% | 84,3% |
| TikTok | 71,5% | 82,1% | 34,7% | 50,5% | 47,8% | 61,7% |
| Snapchat | 70,7% | 84,7% | 26,8% | 44,1% | 42,3% | 58,5% |
| X | 19,5% | 44,1% | 17,4% | 35,4% | 18,2% | 38,5% |
| YouTube | 63,5% | 93,7% | 56,3% | 90,9% | 58,8% | 91,9% |
| Pinterest | 20,1% | 63,9% | 13,2% | 48,4% | 15,6% | 53,9% |
| LinkedIn | 10,6% | 29,4% | 14,9% | 44,7% | 13,4% | 39,3% |
| Twitch | 13,4% | 35,6% | 9,8% | 24,4% | 11,1% | 28,4% |
| Discord | 23,4% | 45,3% | 12,5% | 28,0% | 16,4% | 34,1% |
| WhatsApp | 65,6% | 91,4% | 75,2% | 92,8% | 71,8% | 92,3% |
| Messenger | 46,7% | 74,7% | 62,7% | 86,5% | 57,0% | 82,3% |
| Threads | 8,8% | 25,6% | 8,7% | 21,3% | 8,7% | 22,8% |
| BeReal | 31,2% | 42,9% | 14,2% | 22,3% | 20,2% | 29,5% |
| Telegram | 11,7% | 27,6% | 12,9% | 26,7% | 12,4% | 27,0% |
| Signal | 5,0% | 13,4% | 6,7% | 15,5% | 6,1% | 14,8% |
| Clubhouse | 5,3% | 12,5% | 4,8% | 11,5% | 5,0% | 11,8% |
| Reddit | 10,3% | 29,7% | 9,9% | 24,7% | 10,1% | 26,4% |
| Triller | 5,1% | 12,5% | 4,8% | 11,8% | 4,9% | 12,0% |
| Tinder | 5,6% | 15,7% | 7,5% | 18,0% | 6,8% | 17,2% |
| OnlyFans | 4,4% | 9,4% | 4,8% | 11,5% | 4,7% | 10,8% |
| Spotify | 66,1% | 82,1% | 39,0% | 63,6% | 48,6% | 70,1% |
| Strava | 8,8% | 31,2% | 8,5% | 25,0% | 8,6% | 27,2% |

Table 4: Daily and monthly social media use per platform among Belgians aged 16 to 39 (N = 4715).

The graph below shows that the use of Instagram, Snapchat and TikTok decreases as age increases. The opposite is true for Facebook. X and YouTube usage remain relatively constant across all age groups.

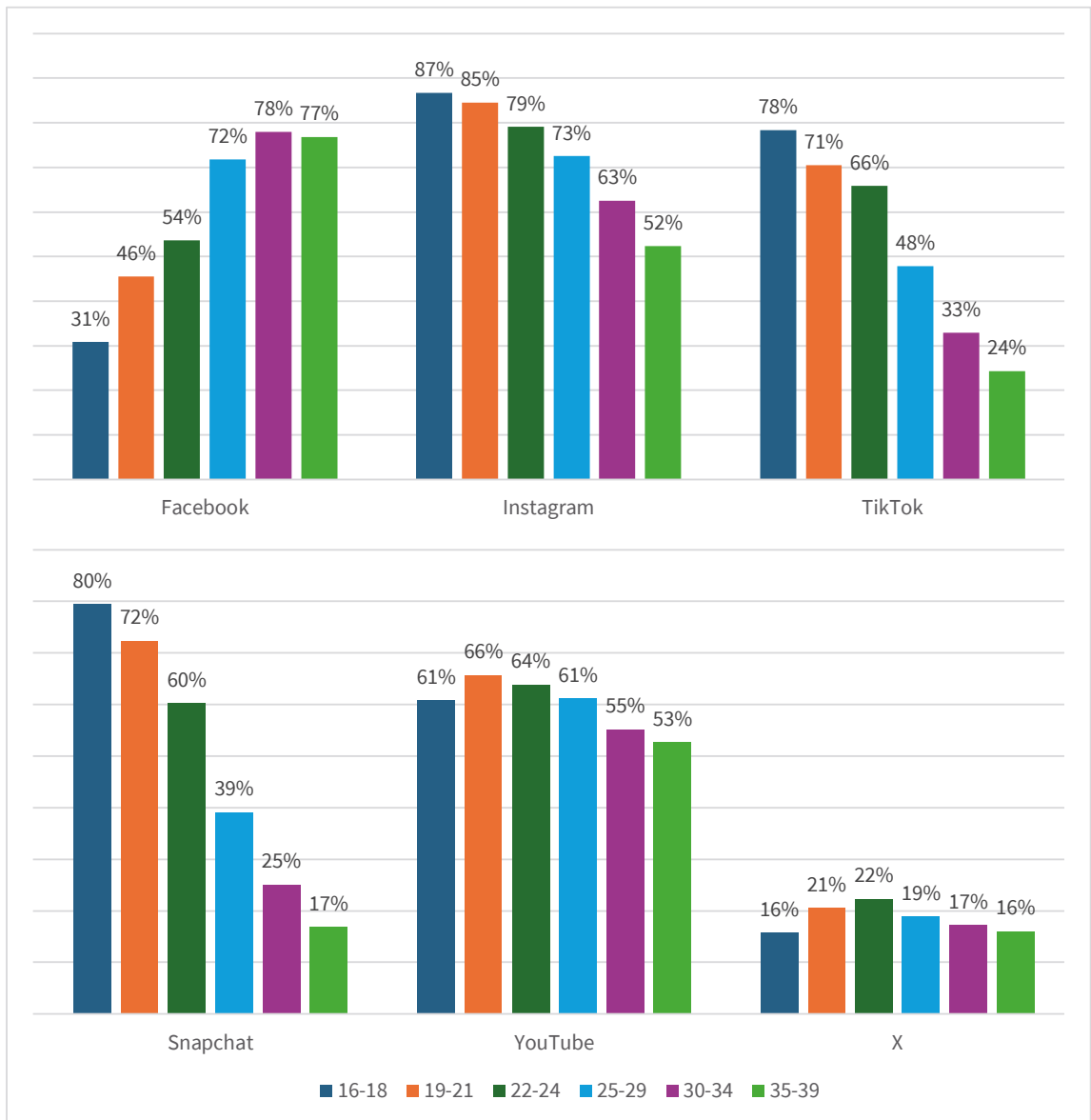


Figure 4: Daily social media use across age groups (in %; N = 4715).

« Facebook, je l'ai encore, mais je ne vois pas l'intérêt d'y aller si j'ai Instagram et tout le reste. » (16-18)

Figure 5 shows that platforms like X, YouTube, Twitch, Discord, Telegram, Reddit, and Strava are more popular among men. In contrast, women show higher daily usage rates on Facebook, Instagram, and Messenger.

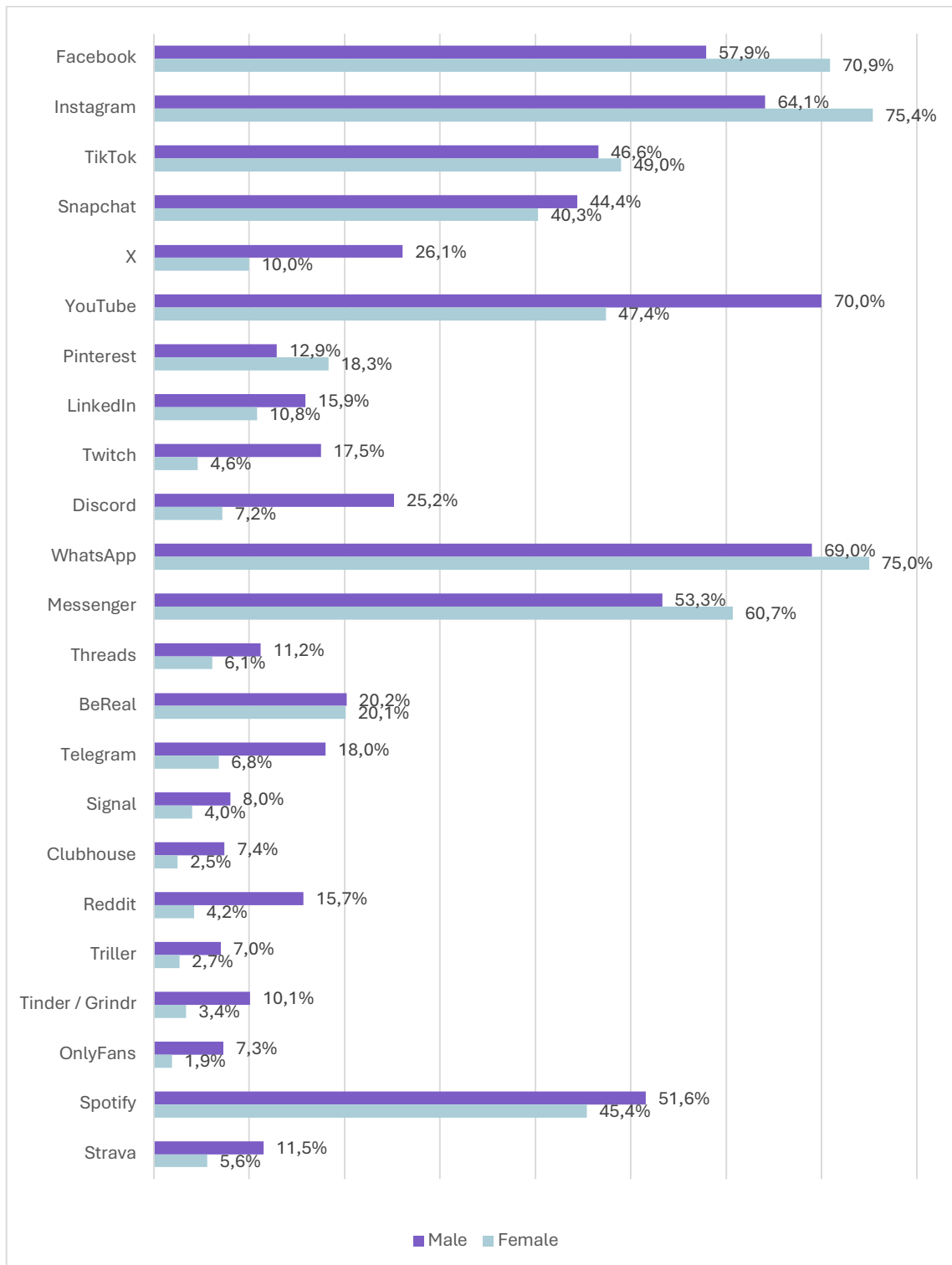


Figure 5: Daily social media use according to gender (N = 4715).

Table 5 presents the top 5 most used social media platforms. In general, females tend to engage more intensely with mainstream social media, with Instagram being the dominant platform for young women (89,3%). Furthermore, the top 5 for **25-39 year-olds** includes more communication channels (such as WhatsApp and Messenger), which is less common among the 16-24 age group. For younger individuals, particularly men, entertainment-focused platforms like Spotify and YouTube take a more prominent place. Niche platforms such as Twitch, Discord, Signal, Telegram, Clubhouse, Triller, Tinder/Grindr, OnlyFans, and Reddit are more frequently used by men. The exception is Pinterest, which is popular among **16-24 year-old** women, with 27,0% using it daily.

| | 16-24 | | 25-39 | |
|----------|----------------------|----------------------|----------------------|----------------------|
| | Men | Women | Men | Women |
| 1 | Instagram (77,8%) | Instagram (89,3%) | WhatsApp (72,0%) | Facebook (81,5%) |
| 2 | YouTube (75,0%) | TikTok (78,2%) | Facebook (69,7%) | WhatsApp (78,7%) |
| 3 | Snapchat (70,0%) | Snapchat (72,4%) | YouTube (67,2%) | Instagram (68,1%) |
| 4 | Spotify (66,7%) | WhatsApp (67,8%) | Messenger (60,4%) | Messenger (64,8%) |
| 5 | TikTok (65,9%) | Spotify (65,7%) | Instagram (56,5%) | YouTube (45,4%) |

Table 5: Top 5 daily used social media platforms according to age and gender.

In Figure 6, the daily social media use is plotted according to language group. It shows that daily social media usage is different between Dutch- and French-speaking Belgians, especially for TikTok, YouTube, Snapchat, WhatsApp, Messenger, and Spotify.

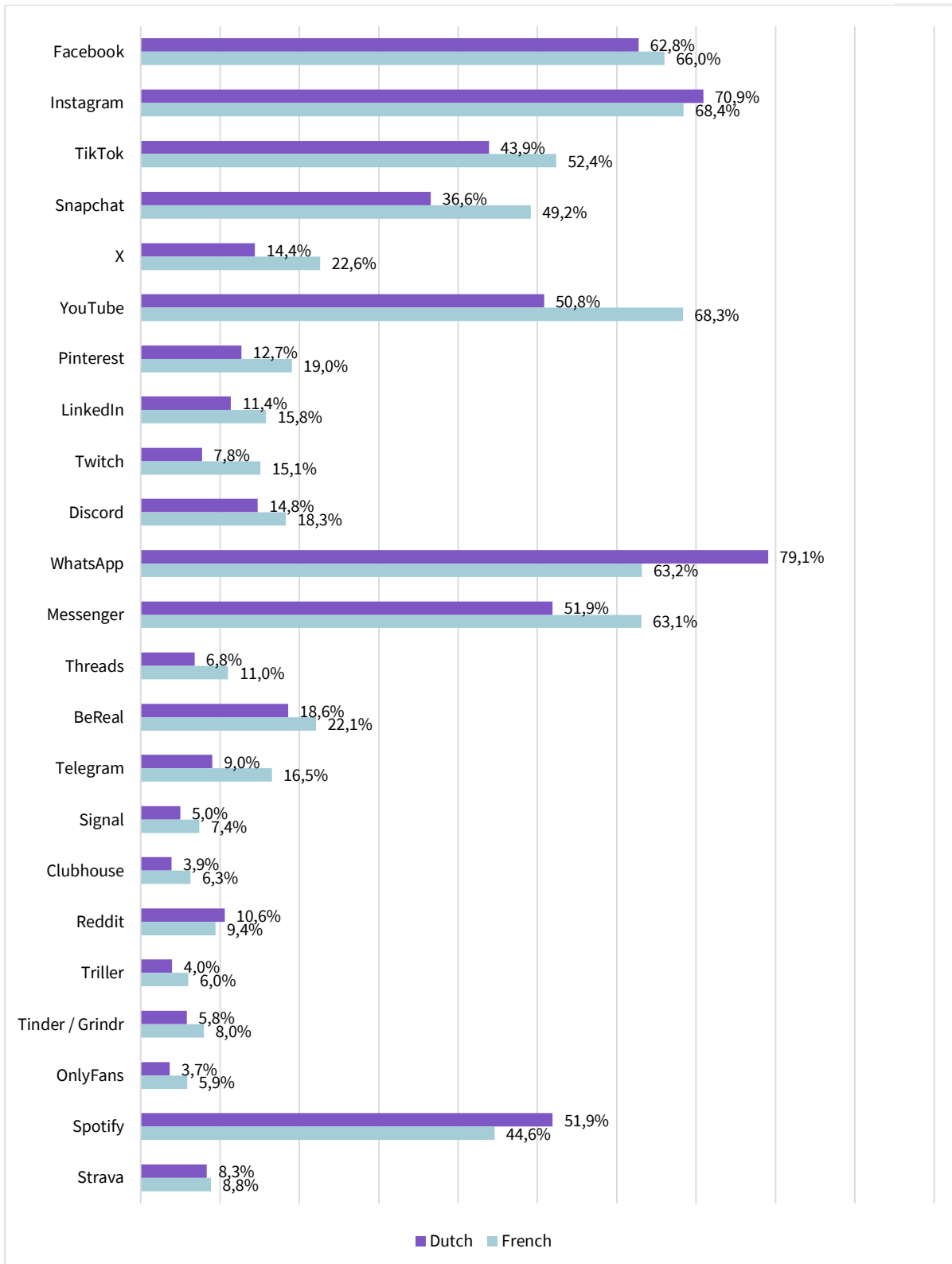


Figure 6: Daily social media use among 16–39-year-olds according to language (N = 4715).

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 (69,6% daily use, 16-24: 61,1%; 25-39: 73,1%). About 2 in 5 (39,7%) of the regular Facebook users use Groups on a daily basis (16-24: 34,9%; 25-39: 41,6%). Additionally, Stories and Reels are viewed daily among one third of frequent users (stories: 35,6%; reels: 35,1%), with younger users (16-24) engaging less (stories: 28,0%, reels: 28,2%) compared to those aged 25-39 (stories: 38,6%, reels: 37,9%). Facebook Events are used monthly by 62,8% of users but have low daily engagement (18,2%), with similar usage across age groups (16-24: 18,7%; 25-39: 18,1%). The Birthday feature sees moderate monthly usage (56,9%), with slightly higher daily engagement among older users (23,6%) compared to younger ones (19,7%). Finally, Marketplace is visited by 60,5% of users monthly (16-24: 55,5%; 25-39: 62,5%), but daily engagement remains lower at 22,9% (16-24: 21,1%; 25-39: 23,6%).

On **Instagram**, the feed remains the most frequently used feature, with 79,7% of regular users engaging daily (16-24: 83,0%; 25-39: 77,7%). Stories are also highly popular, with 73,7% viewing them daily (16-24: 77,8%; 25-39: 71,3%). Reels are watched daily by 57,8% of users, with a significant age difference—higher among younger users (16-24: 68,3%) than older ones (25-39: 51,5%). Instagram Chat (Direct Messages) is used daily by 52,4% of users, with younger individuals engaging much more (16-24: 69,5%) compared to older ones (25-39: 42,1%). It is noteworthy that the daily usage of the messaging function among the youngest age group has further increased compared to last year (+3,4%). Overall, Instagram sees high daily engagement, especially among younger users, with Stories and Reels being key features.

On YouTube, regular users primarily engage with videos, with 65,7% watching daily (16-24: 70,0%; 25-39: 63,1%). Shorts, YouTube's short-form video feature, have lower daily engagement at 36,6%, with younger users (16-24: 36,4%) and older users (25-39: 36,8%) showing similar usage patterns.

| | 16-24 | | 25-39 | | Total | |
|--|-------|---------|-------|---------|-------|---------|
| | Daily | Monthly | Daily | Monthly | Daily | Monthly |
| Facebook (N = 3664; 16-24: 1055; 25-39: 2609) | | | | | | |
| Feed | 61,1% | 89,6% | 73,1% | 90,5% | 69,6% | 90,2% |
| Groups | 34,9% | 73,2% | 41,6% | 81,0% | 39,7% | 78,8% |
| Marketplace | 21,1% | 55,5% | 23,6% | 62,5% | 22,9% | 60,5% |
| Stories | 28,0% | 58,9% | 38,6% | 70,7% | 35,6% | 67,3% |
| Reels | 28,2% | 61,4% | 37,9% | 69,3% | 35,1% | 67,0% |
| Events | 18,7% | 61,8% | 18,1% | 63,2% | 18,2% | 62,8% |
| Birthday | 19,7% | 57,6% | 23,6% | 56,6% | 22,5% | 56,9% |

| | 16-24 | | 25-39 | | Total | |
|---|-------|---------|-------|---------|-------|---------|
| | Daily | Monthly | Daily | Monthly | Daily | Monthly |
| Instagram (N = 3777; 16-24: 1524; 25-39: 2253) | | | | | | |
| Feed | 83,0% | 95,8% | 77,7% | 93,9% | 79,7% | 94,7% |
| Stories | 77,8% | 95,2% | 71,3% | 93,4% | 73,7% | 94,2% |
| Reels | 68,3% | 92,5% | 51,5% | 86,2% | 57,8% | 88,8% |
| Chat (DM) | 69,5% | 94,9% | 42,1% | 85,2% | 52,4% | 89,1% |
| YouTube (N = 3786; 16-24: 1397; 25-39: 2389) | | | | | | |
| Videos | 70,0% | 96,4% | 63,1% | 93,4% | 65,7% | 94,5% |
| Shorts | 36,4% | 68,2% | 36,8% | 67,3% | 36,6% | 67,6% |

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

Although Facebook is no longer the go-to platform for daily social interaction among younger audiences, some still rely on it, mainly for practical purposes like school coordination or event planning. Messenger, too, remains in use within certain student circles:

« Moi aussi, à Bruxelles, j'ai un groupe d'école, c'est Facebook. Donc, on utilise directement aussi Messenger, on fait des groupes pour les travaux de groupe, etc. Moi, j'utilise encore peut-être même plus Messenger que WhatsApp. » (19-24)

« Les plus jeunes vont plus aller sur Insta. Par exemple, je suis chef pionnier et on fait un groupe avec les pionniers. Ils ont entre 16 et 18 ans, et ils n'utilisent absolument pas Facebook ni Messenger. Du coup, on a dû faire un groupe Insta pour pouvoir leur envoyer des trucs. » (19-24)

[About Facebook] "Enkel voor de verjaardagen. Dat is de reden waarom ik het niet verwijder." (19-24)

SOCIAL MEDIA USE OVER TIME

Over the years, the SMI Barometer has evolved in its approach to surveying social media usage in Belgium. Initially, in 2020, the focus was on 16- to 24-year-olds in Flanders. From 2021 to 2022, the study expanded to include the same age group across all of Belgium. Starting in 2023, the research scope was broadened to encompass a wider age range, covering 16- to 39-year-olds throughout Belgium. Hence, the SMI Barometer provides valuable insights into the evolving social media landscape, capturing shifts in social media behavior across diverse linguistic and age groups.

The evolution of social media use compared to last year

In 2025, several social media platforms have seen a shift in user engagement compared to the previous year. X experienced a notable decline of 3,1%, with daily usage dropping now to 18,2%. Other platforms also faced a decrease in usage, including Meta platforms Facebook and Messenger, which saw declines of 2,9% and 2,3%, respectively. WhatsApp and TikTok were the exceptions, both showing significant growth with increases of 2,3% and 2,8%, respectively.

| | Face-book | Insta-gram | TikTok | Snap-chat | X | You Tube | Pinte-rest | Linke-din | Whats App | Mes-senger |
|-------------|--------------|-------------|-------------|-------------|--------------|-------------|--------------|--------------|-------------|--------------|
| 2024 | 67,1% | 69,7% | 45,0% | 41,5% | 21,3% | 58,1% | 17,4% | 15,2% | 69,5% | 59,1% |
| 2025 | 64,2% | 69,8% | 47,8% | 42,3% | 18,2% | 58,8% | 15,6% | 13,4% | 71,8% | 57,0% |
| Gap | -2,9% | 0,1% | 2,8% | 0,8% | -3,1% | 0,7% | -1,8% | -1,8% | 2,3% | -2,1% |

Table 7: Comparison between 2024 and 2025 of daily social media usage.

These trends reflect broader changes in the social media landscape. Moreover, in recent months, concerns have arisen regarding changes in content moderation policies on platforms like X and Meta's Facebook and Instagram. Both companies have shifted from professional fact-checking to community-driven moderation systems. Notably, in recent months, several Belgian organizations and companies have chosen to leave the platform, citing misalignment with their values.² This dynamic highlights the importance for brands to continuously evaluate and adapt their social media strategies in response to changing user preferences and platform developments.

"Algoritmes zijn vandaag zodanig geëvolueerd dat ze je precies tonen wat je wil zien. Wie geïnteresseerd is in 'fake news' of in een bepaalde feed zit, blijft diezelfde content krijgen. Mensen stappen zelden weg van een platform zolang ze krijgen wat ze zoeken. Slechts een kleine groep doet dat bewust, uit principe. Wat telt, is de ervaring: krijg ik de content die ik wil, of ben ik mijn tijd aan het verdoen? Voor consumenten draait het dus vooral om relevante content. Voor merken ligt dat verhaal natuurlijk anders." (Tjorven Crevits, Colruyt Group)

² <https://www.vrt.be/vrtnws/nl/2025/03/19/nmbbs-verlaat-x-wegens-niet-langer-in-lijn-met-de-waarden/>

The evolution of social media use among 16- to 24-year-olds in Belgium

Concerning all Belgian 16- to 24-year-olds' social media use, the following graph shows that Facebook continues to decline, with its popularity dropping from 70,8% in 2021 to 43,4% in 2025. TikTok saw rapid growth, increasing from 46,9% in 2021 to 71,5% in 2025, confirming its widespread adoption across both language groups. Instagram remained a top platform, fluctuating slightly but maintaining a high level of engagement (81,4% in 2024 -86,6% in 2023). Snapchat peaked at 74,2% in 2023, before slightly declining to 70,7% in 2025. YouTube usage remained relatively stable, decreasing slightly from 72,4% in 2021 to 63,5% in 2025, likely due to competition from TikTok and Instagram's video content. X continued to decline, from 24,2% in 2021 to 19,5% in 2025.

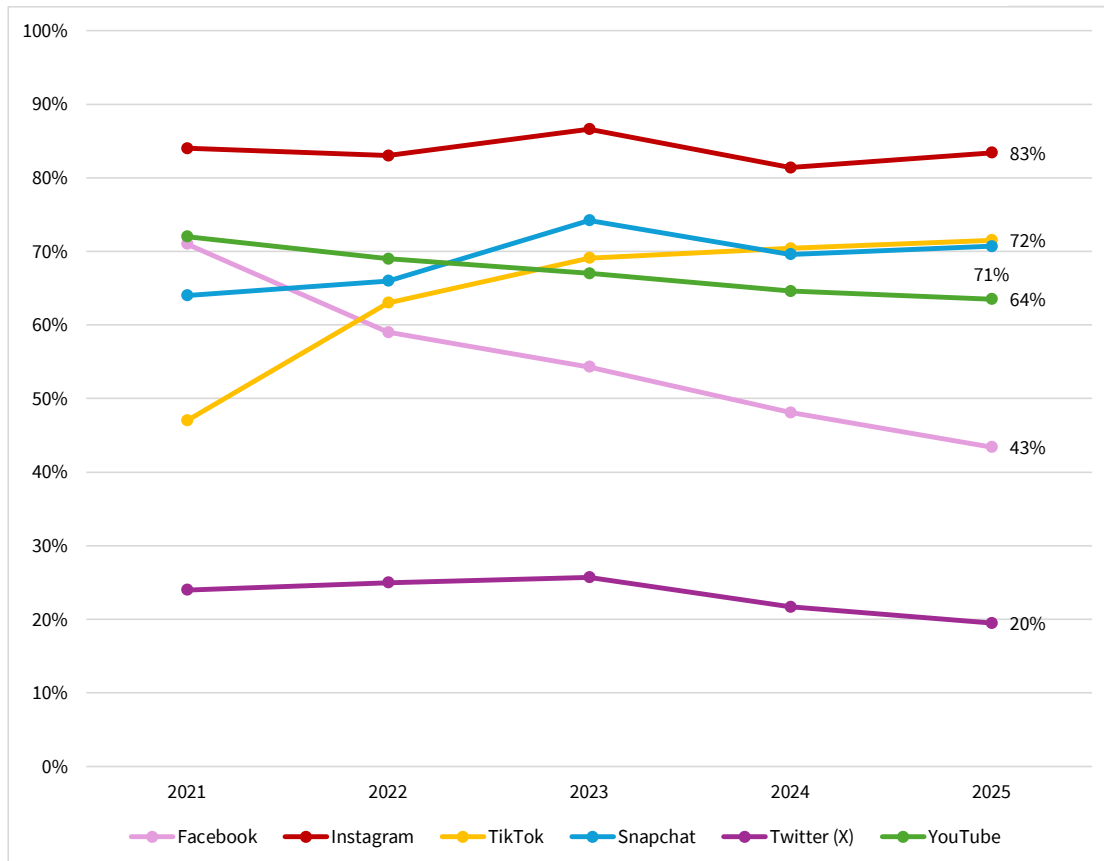


Figure 9: Evolution of social media use among Belgian young people (16-24 years; expressed in % of young people that uses the channel (almost) daily or more frequently).

The evolution of social media use among belgian Dutch-speaking 16- to 24-year-olds

From 2020 to 2025, social media usage among Dutch-speaking 16-to 24-year-olds shifted significantly. Facebook showed a consistent and significant decline, dropping from 84,7% in 2020 to 41,8% in 2025, indicating a shift away from the platform among younger demographics. In contrast, TikTok experienced an explosive rise, climbing from 8,8% in 2020 to 70,6% in 2025, solidifying its position as a dominant social media platform. Meanwhile, Instagram remained relatively stable, hovering around 81,1% (2024) to 87,9% (2021) over the years. Snapchat saw a steady increase, rising from 60,0% in 2020 to 73,3% in 2023, followed by a slight decline to 68,6% by 2025. YouTube usage stayed fairly consistent, fluctuating slightly between 61,7% (2023) and 68,8% (2021). In contrast, X (formerly Twitter) experienced a gradual decline, dropping from 22,8% in 2020 to 16,2% in 2025. The following graph illustrates these trends, highlighting the evolving social media landscape between 2020 and 2025 for Belgian Dutch-speaking young people (16-24):

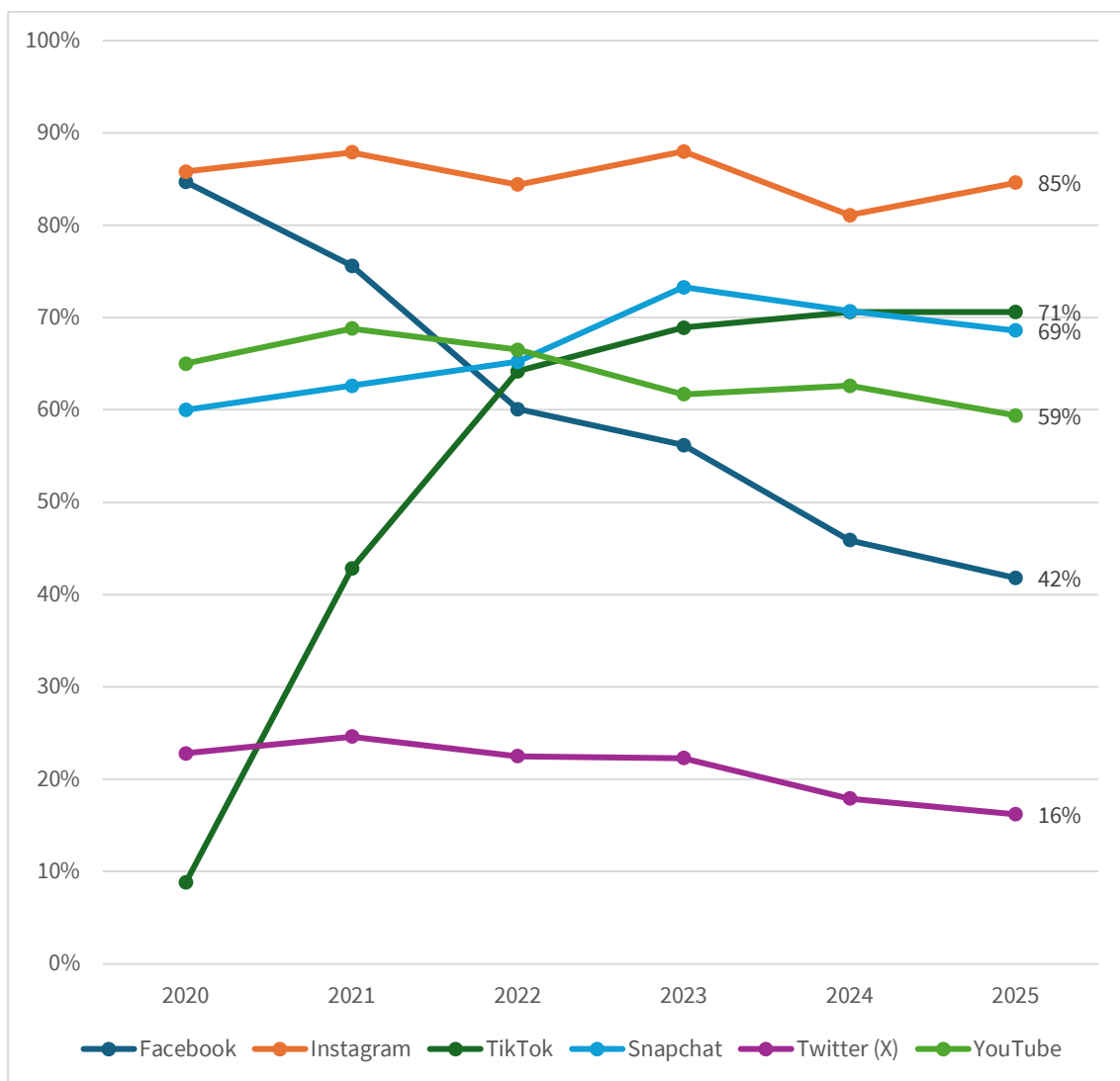


Figure 7: Evolution of social media use among Belgian Dutch-speaking young people (16-24 years; expressed in % of young people that uses the channel (almost)daily or more frequently).

The evolution of social media use among Belgian French-speaking 16- to 24-year-olds

In 2021, the study was expanded to include both Dutch- and French-speaking youth across Belgium, providing a broader view of social media trends among all 16- to 24-year-olds. The next graph illustrates the evolution of social media use among Belgian French-speaking 16- to 24-year-olds.

Facebook has experienced a steady decline, dropping from 65,2% in 2021 to 45,3% in 2025. In contrast, TikTok has seen significant growth, rising from 52,0% in 2021 to 72,7% in 2025. Instagram remains a leading platform, maintaining high engagement levels around 80%, peaking at 84,4% in 2023 before stabilizing at 82,0% in 2025. Snapchat has also grown, increasing from 66,1% in 2021 to 75,5% in 2023, before slightly fluctuating to 73,2% in 2025. Meanwhile, X saw a brief surge in 2023, reaching 30,4%, but declined again to 23,6% in 2025. YouTube usage has remained relatively stable, though it dipped from 76,7% in 2021 to 66,9% in 2024, before recovering slightly to 68,6% in 2025.

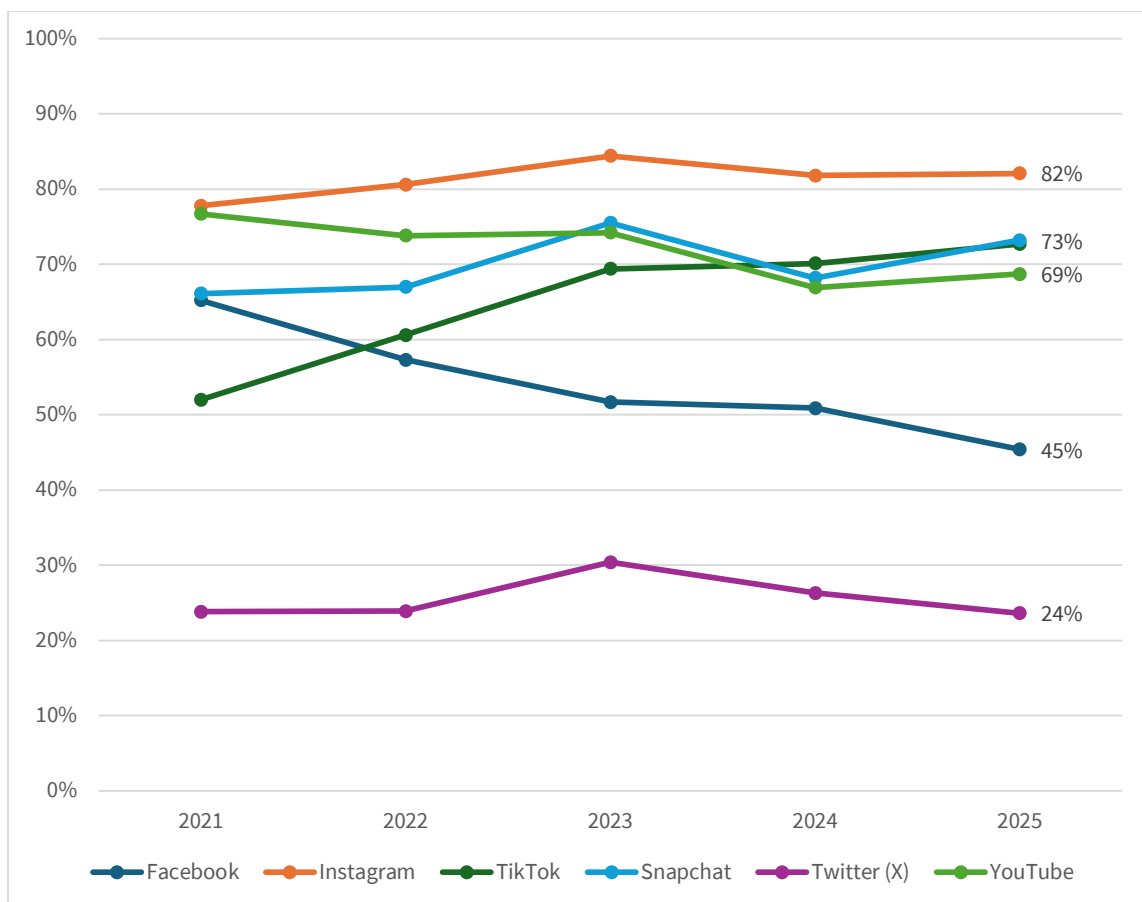


Figure 8: Evolution of social media use among Belgian French-speaking young people (16-24 years; expressed in % of young people that uses the channel (almost)daily or more frequently).

The evolution of social media use among 16- to 39-year-olds in Belgium

Since 2023, the SMI Barometer has expanded its scope, shifting from a focus on 16- to 24-year-olds to include a broader age range of 16- to 39-year-olds.

The following graph illustrates how social media usage has evolved between 2023 and 2025 within this expanded demographic. Facebook continues its decline, with usage dropping from 69,2% in 2023 to 67,1% in 2024, and further to 64,2% in 2025. Instagram has remained one of the most popular platforms, with usage holding steady at 70,0% in 2023, slightly decreasing to 69,7% in 2024, before rising again to 70% in 2025. TikTok has experienced slight fluctuations but continues to grow overall, with usage at 45,2% in 2023, dipping slightly to 45,0% in 2024, and then increasing to 47,8% in 2025. Snapchat has seen a moderate decline, starting at 44,5% in 2023, dropping to 41,5% in 2024, and settling at 42,3% in 2025. YouTube has remained relatively stable, with a minor decrease from 60,8% in 2023 to 58,1% in 2024, before slightly increasing to 58,8% in 2025. This suggests that while YouTube continues to be a major platform for video content, it faces growing competition from TikTok's short-form video model. X continues to decline, dropping from 22,1% in 2023 to 21,3% in 2024, and further down to 18,2% in 2025. Concerning messaging services, WhatsApp is on the rise, growing from 66,1% in 2023 to 69,5% in 2024, and further to 71,8% in 2025. Messenger usage has steadily decreased, from 65,0% in 2023 to 59,1% in 2024, and further to 57,0% in 2025.

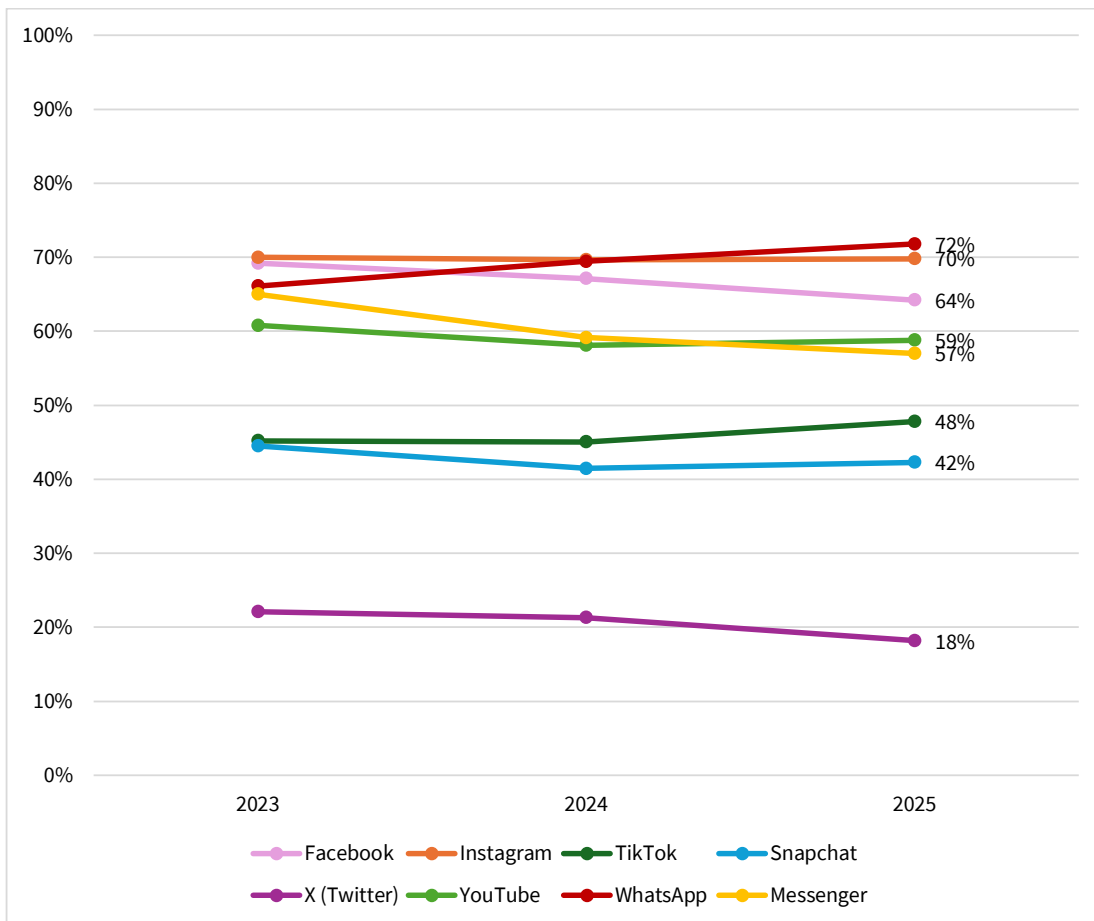


Figure 10: Evolution of social media use among Belgian young people (16-39 years; expressed in % of young people that uses the channel (almost) daily or more frequently).

REDUCING SOCIAL MEDIA USE

74,8% of Belgians aged 16 to 39 have taken steps to limit their social media use. That is an increase with 4,4% compared to last year. The types of actions that people undertake remain rather the same. The most common actions include deleting apps (30,4%), turning off notifications (26,6%), and setting screen time limits (19,6%). Younger individuals (16-24; 80,9%) are more proactive in managing their social media consumption than older individuals (25-39; 71,6%). They are more likely to delete apps, set screen time limits, take digital detoxes, and keep their devices out of reach.

Overall, men (77,1%) are slightly more active in limiting social media use than women (72,0%). Some gender differences emerge for specific actions. More men delete social media accounts (20,0% vs. 12,9%), while more women keep their smartphones out of reach (20,1% vs. 17,4%) and turn off notifications (30,8% vs. 22,4%).

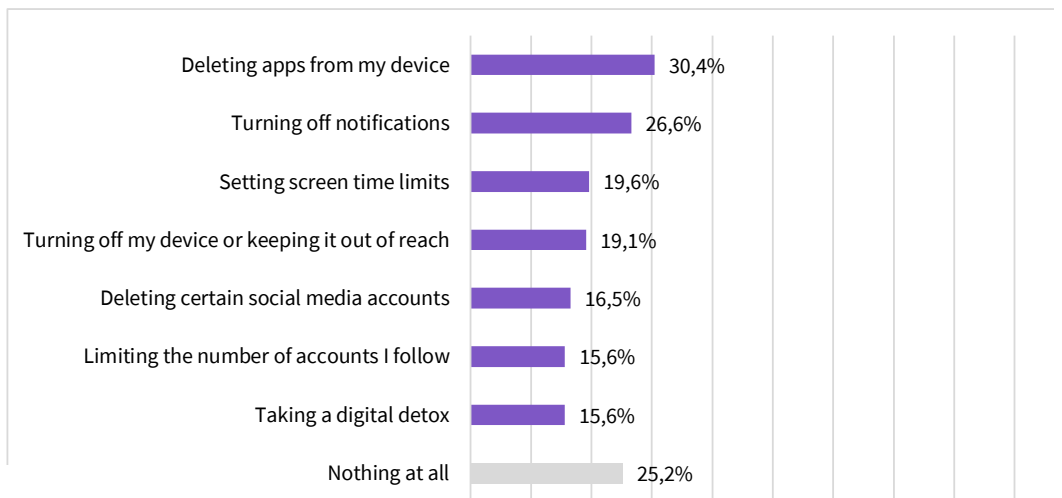


Figure 11: Actions to reduce social media use among Belgians (N = 2343; question was only asked to half of the sample)

While social media remains deeply embedded in daily life, several young users report actively trying to reduce their screen time or regain control over their usage. Platforms like TikTok, in particular, are often described as highly addictive, prompting some to uninstall the app or disabling notifications or restricting their use of certain apps to specific moments:

"Ik heb TikTok volledig verwijderd omdat ik mijn tijd verspilde en er niet gelukkiger van werd." (19-24)

"Je komt echt in een wormhole terecht. Je blijft maar doorscrollen en stopt niet." (19-24)

« J'ai arrêté TikTok parce que c'était trop addictif, mais je regarde des reels sur Instagram. Au moins, j'ai enlevé une application, et je trouve ça beaucoup moins... TikTok, tu ne t'arrêtes pas. Avant, je ne m'arrêtais pas. » (19-24)

PERSONAL USE OF AI FOR SOCIAL MEDIA CONTENT GENERATION

Almost 4 in 10 Belgians (16-39) have posted content on social media that was made **with the help of AI**. Specifically, 16,3% have ever used AI for video creation, 15,0% for writing text (such as captions), 14,1% for generating images, and 3,2% for audio. AI-assisted content creation is more common among younger users, with 44,1% of those aged 16-24 utilizing it, compared to 34,0% of those aged 25-39.

Interestingly, men are generally more likely than women to use AI for social media content, regardless of age. Nearly half of males aged 16-39 (48,2%) have used AI for generating images, videos, text, or audio, compared to 27,6% of women. The gap is even wider among younger users: 56,5% of men aged 16-24 report using AI for content creation, compared to 43,3% of women in the same age group. Among young men, 23,8% use AI for video creation, 21,0% for images, and 20,7% for text, whereas for young women, these figures are 11,2%, 15,7%, and 10,9%, respectively.

French-speaking individuals are more likely than Dutch-speaking individuals to use AI for social media content creation (43,9% vs. 32,6%).

| | Men | | | Women | | |
|----------------------|-------|-------|-------|-------|-------|-------|
| | 16-24 | 25-39 | Total | 16-24 | 25-39 | Total |
| Yes, pictures | 21,0% | 16,9% | 18,4% | 10,9% | 9,5% | 10,0% |
| Yes, videos | 23,8% | 22,5% | 23,0% | 11,2% | 9,1% | 9,9% |
| Yes, copy | 20,7% | 15,3% | 17,3% | 15,7% | 11,2% | 12,8% |
| Yes, audio | 5,7% | 3,4% | 4,2% | 2,8% | 1,7% | 2,1% |
| No | 43,5% | 56,7% | 51,9% | 67,7% | 74,9% | 72,4% |

Table 8: How AI is used to create social media content (self-reported; gender versus age).

| | Dutch | | | French | | |
|----------------------|-------|-------|-------|--------|-------|-------|
| | 16-24 | 25-39 | Total | 16-24 | 25-39 | Total |
| Yes, pictures | 12,9% | 11,0% | 11,7% | 19,2% | 15,6% | 16,8% |
| Yes, videos | 14,8% | 12,4% | 13,3% | 20,7% | 19,3% | 19,8% |
| Yes, copy | 17,7% | 12,4% | 14,4% | 18,6% | 14,2% | 15,8% |
| Yes, audio | 3,7% | 2,0% | 2,6% | 4,8% | 3,3% | 3,8% |
| No | 62,0% | 71,0% | 67,6% | 48,4% | 60,3% | 56,1% |

Table 9: How AI is used to create social media content (self-reported; language versus age).

Motivations behind social media use



KEY INSIGHTS

- Social media is primarily used for staying connected. Among frequent users, WhatsApp and Messenger are primarily used to interact with friends and family.
- Among 16-24-year-olds Snapchat and Instagram are frequently used for friend interactions.
- Staying informed about activities of friends and family is a major driver of social media use, in particular on Facebook and Instagram.
- YouTube, TikTok, and Instagram are the most popular platforms for relaxation and passing time.
- Pinterest, Instagram, and TikTok are key sources of inspiration, with Pinterest primarily serving this purpose.
- People turn to social media for learning, in particular to YouTube. TikTok is also used for learning among young frequent users.

To better understand the benefits of social media for Belgians and the activities they engage in on each platform, we surveyed frequent users—those who use a platform at least once a week—about their reasons for using the platform. Participants could select from a predefined list of activities for each platform, allowing us to identify the primary purposes for which different social media platforms are used. 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.

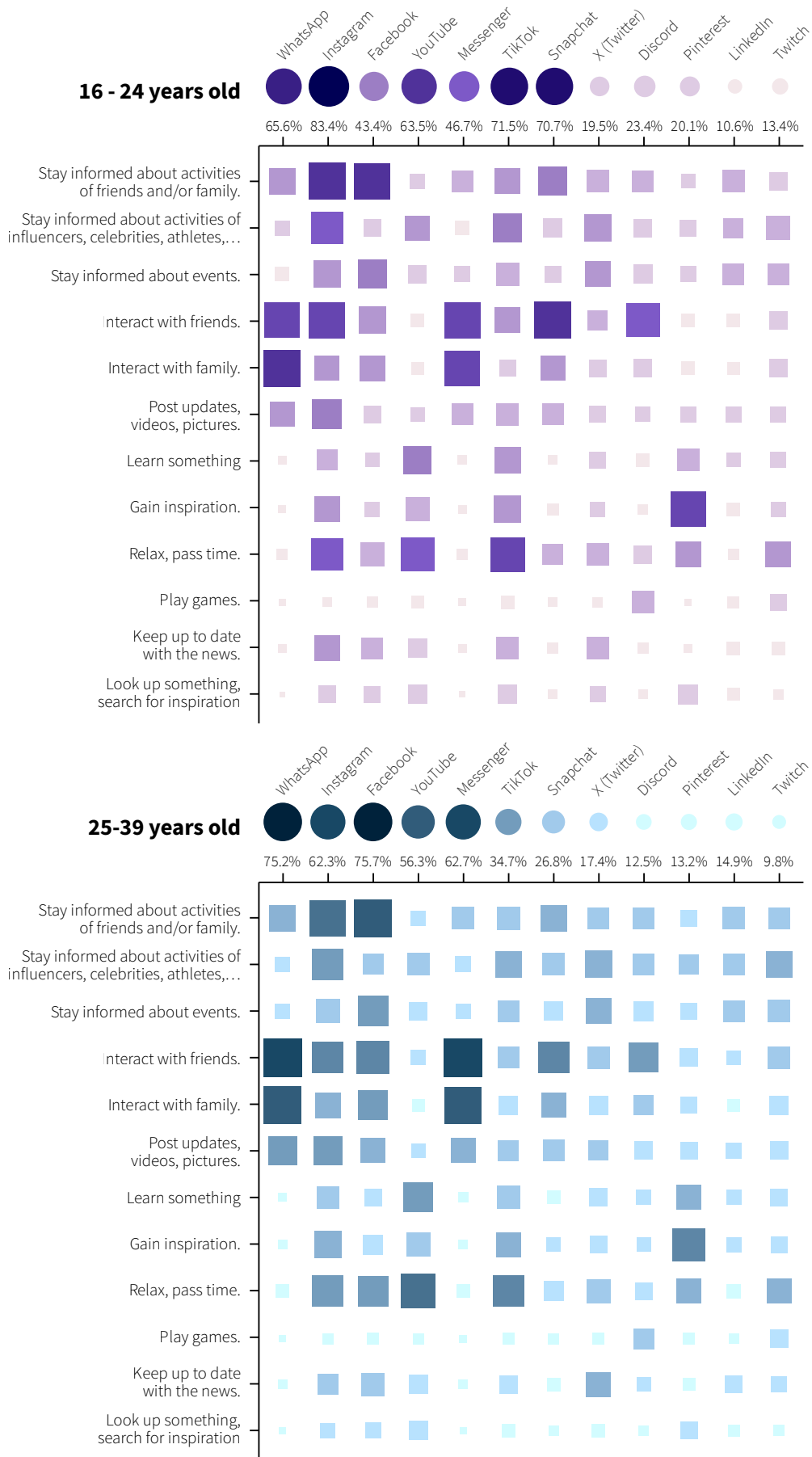


Figure 12: Motivations behind social media use according to age group
 (Data visual by Baryon Design baryon.be).

SOCIAL MEDIA TO STAY CONNECTED

One of the primary reasons frequent social media users in Belgium engage with social media is to stay connected with friends and family. Among frequent WhatsApp users, 70,6% use it to **interact with friends**, and 70,2% use it to stay in touch with **family**. Among frequent Messenger users, 72,9% engage with friends, and 67,5% with family. Their importance increases in the 25-39 age group, where among frequent users, WhatsApp (75,2% for friends, 71,5% for family) and Messenger (75,7% for friends, 69,5% for family) become even more dominant. Among younger users (16-24), WhatsApp is still widely used to connect with friends (61,8% of frequent users) and family (67,6% of frequent users), while Messenger follows closely.

Among frequent users of Instagram and Snapchat, Instagram is more frequently used for interacting with friends by younger users (16-24: 64,8%) than older users (25-39: 50,3%). Similarly, Snapchat is more commonly used by younger frequent users (16-24: 68,5%) than older ones (25-39: 50,3%). Interestingly, these platforms are not typically used by younger users to stay in touch with family — only 30,6% of frequent Snapchat users and 30,4% of frequent Instagram users aged 16–24 say they use them for that purpose. Discord, though niche, is also more frequently used for friend interactions by younger frequent users (56,7%) than by older ones (43,6%).

Among frequent Facebook users, the platform is more popular among the older demographic for **staying updated on family and friends** (25-39: 72,4% vs. 16-24: 67,0%). Instagram is widely used for maintaining social connections across both younger (68,2%) and older (64,3%) frequent users.

Snapchat also plays an important role in social interaction, particularly among younger frequent users (42,6% of 16-24-year-olds vs. 35,9% of 25-39-year-olds). Additionally, gender differences reveal that female frequent users tend to use these platforms more often than male frequent users for staying connected (Facebook: 75,1% female vs. 66,3% male; Instagram: 73,7% female vs. 57,6% male).

There are also notable differences based on language. Dutch-speaking frequent users are more likely to use Facebook (73,6%) and Instagram (70,5%) for staying in touch compared to French-speaking frequent users (67,7% and 58,8%).

Staying connected with friends and family is a primary motivation for social media use among young Belgians. WhatsApp and Messenger are widely used for direct communication with friends and family. However, younger users (16-24) tend to prefer Instagram and Snapchat for staying in touch with friends. The following quotes from focus group participants highlight how young Belgians navigate different platforms for communication:

"Messenger en WhatsApp is echt voor mijn communicatie. Instagram is eerder om te zien waar mijn vrienden mee bezig zijn." (19-24)

"Ik chat niet meer via Messenger, maar via Instagram." (19-24)

"Alles vertrekt voor mij vanuit Instagram. Ik ga dan in gesprek met mensen door te reageren. Vooral met mijn vrienden." (19-24)

« Snapchat, c'est pour communiquer avec mes amis. Après, c'est WhatsApp parce qu'on a un groupe géant avec toute la famille, parce que j'ai une grande famille. » (16-18)

"Ik gebruik vooral TikTok, Snapchat en Instagram. Snapchat vooral om te communiceren met mijn vrienden en heel de dag door." (16-18)

SOCIAL MEDIA AS A FAVORITE PASTIME

Relaxation and entertainment are major drivers of social media engagement. Among frequent users, YouTube (58,6%), TikTok (55,0%), and Instagram (50,3%) are the leading platforms for **passing time and relaxation**. Pinterest (32,1%) and Facebook (40,6%) also attract a significant share of frequent users who turn to these platforms for leisure.

While gaming remains a niche activity, Discord (23,9%) stands out among its frequent users for gaming-related content, particularly among younger frequent users (16-24: 25,8%).

Among frequent Facebook users, entertainment and passing time are more commonly cited reasons among older users (25-39: 45,5%) than younger users (16-24: 28,4%). Conversely, among frequent TikTok users, entertainment is significantly more relevant for younger users (16-24: 59,8%) than older users (25-39: 50,3%).

Females and Dutch-speaking frequent users show similar patterns in their social media entertainment preferences. Both groups are more likely to use Instagram, TikTok, and YouTube for relaxation and entertainment compared to males and French-speaking frequent users. Females are more engaged among frequent users of Instagram (59,9%), TikTok (64,8%), and YouTube (63,1%) than males (39,6%, 45,0%, and 54,8%, respectively). Similarly, Dutch-speaking frequent users are more likely to use Instagram (54,4%), TikTok (58,6%), and YouTube (60,7%) compared to French-speaking frequent users (42,7%, 49,3%, and 55,0%). Pinterest also follows this trend, with women (37,9%) and Dutch speakers (33,2%) favoring it significantly more than men (22,2%) and French speakers (29,2%).

For young Belgians aged 16-24, social media play an important role in relaxation and entertainment. TikTok, YouTube, and Instagram are the top platforms for passing time, with TikTok being particularly popular among younger users. Snapchat and Instagram are also commonly used for consuming entertaining content, while Facebook is less relevant for leisure in this age group. The following quotes illustrate how young Belgians engage with these platforms to pass time:

« Si je veux vraiment me divertir, je vais sur TikTok. Là, ça me fait bien rire. Sinon, pour m'informer, c'est Instagram. » (19-24)

« C'est Instagram, Snapchat et TikTok. Pour Instagram et TikTok, plus pour le divertissement. Snapchat pour la communication. » (16-18)

"Instagram vooral om te kijken wat er in de wereld leeft en om grappige video's te bekijken." (16-18)

"Als ik thuis ben en niet echt iets te doen heb, zoals wanneer ik 's avonds op mijn bed lig, dan gebruik ik TikTok." (16-18)

"TikTok als tijdsbesteding en als ik het beu ben om te kijken op TikTok, kijk ik op Instagram." (16-18)

"Instagram gebruik ik uit interesse om te kijken wat mensen aan het doen zijn. TikTok gebruik ik als ik naar het toilet ga. Eens vijf minuten scrollen. Mijn hoofd uitzetten en kijken, dus meer ontspanning." (19-24)

From our conversations with young people, it stood out that they have a clear **understanding of how algorithms influence the content they see**, describing how platforms adapt quickly to their likes and behavior. TikTok is often seen as a fun, well-curated space, while Instagram is perceived as more persistent and extreme in the content it pushes.

"TikTok is puur tijdverdrijf. Ik vind dat ook veel makkelijker om op te slaan en terug te vinden. Dat algoritme zit voor mij ook beter in elkaar." (19-24)

[about Instagram] "Ik krijg zo meer dingen van mensen die vallen en zo. Dat is niet op TikTok. Of soms dieren die omver gereden worden. Ja, dat vind ik wel grappig. Het is heel gepersonaliseerd op basis van wat je liket. Zodra je iets liket, kom je dat vaker tegen. Insta is veel extremer dan TikTok. Op TikTok wordt dat veel sneller verwijderd. Op Insta blijft dat terugkomen. Zoals video's van dieren die worden omver gereden. Die vind je op TikTok niet. (...) Twitter is nog erger dan Insta. Als je de extreemste video's wil zien, moet je naar Twitter gaan." (16-18, multiple speakers)

SOCIAL MEDIA AS A SOURCE OF INSPIRATION

Pinterest (57,8%) stands out as the top platform where frequent users **seek inspiration**. Instagram (35,0%), TikTok (33,7%), and YouTube (29,3%) also play an important role in inspiring frequent users of these platforms.

Pinterest is slightly more popular for inspiration among younger (16-24: 61,4%) than older (25-39: 55,1%) frequent users.

Instagram (36,4%) and Facebook (19,8%) are more frequently used by 25-39-year-old frequent users for inspiration than by younger frequent users (16-24: 32,9% and 13,4%, respectively), while TikTok is more popular among younger users (37,4%) compared to older users (30,1%) for inspiration. YouTube, however, shows minimal generational differences, with 28,7% of younger users and 29,7% of older users using it for inspiration.

Women are significantly more likely than men to use social media for inspiration. Pinterest has the largest gender gap: 71,2% of female frequent users use it for inspiration compared to only 36,7% of male frequent users. Instagram (45,5% vs. 23,5%) and TikTok (43,2% vs. 24,1%) are also much more popular among female frequent users as sources of inspiration. YouTube is more balanced, but still slightly favored by female frequent users (31,3%) over male frequent users (27,5%).

Among frequent users, Dutch speakers are generally more likely than French speakers to use social media for inspiration across most platforms. Pinterest remains the top inspiration platform, with higher engagement among Dutch-speaking frequent users (61,3%) than French-speaking ones (52,2%). Instagram (38,5% vs. 29,9%) and TikTok (36,2% vs. 30,1%) are also more frequently used for inspiration by Dutch-speaking frequent users. Facebook and YouTube show smaller differences, with Dutch speakers (19,2% and 30,2%) using them slightly more than French speakers (15,7% and 27,5%).

For young Belgians, social media serves as an important source of inspiration, creativity, and trend discovery. The following quotes from young Belgians illustrate how they use different social media platforms for inspiration:

"Ik gebruik Pinterest vooral voor inspiratie, zoals outfits en bakken." (19-24)

"Op TikTok zoek ik inspiratie voor mijn outfits." (19-24)

"Op YouTube kijk ik vooral naar inspirerende video's." (19-24)

"Op TikTok zie je echt trends, bijvoorbeeld een outfit die ineens heel populair wordt." (16-18)

[about Pinterest] « C'est juste, oui, pour l'inspiration pour des choses. Par exemple, si je dois m'habiller, je peux prendre des exemples là-bas. » (16-18)

SOCIAL MEDIA FOR LEARNING AND INFORMATION

Some social media platforms serve as key sources of knowledge and education among frequent users. Among frequent YouTube users, 42,8% use it for learning. Among frequent TikTok users, 30,9% engage with learning content, followed by 28,2% of frequent Pinterest users and 23,3% of frequent Instagram users.

There are notable differences in how different groups of frequent users engage with social media for learning. Among frequent YouTube users, learning content is slightly more popular among older users (25-39: 44,2%) than younger users (16-24: 40,4%), making it a cross-generational learning platform. Conversely, among frequent TikTok users, younger users (16-24: 34,5%) are more likely to engage with learning content than older users (25-39: 27,3%). Among frequent Pinterest and Instagram users, learning content is slightly more commonly cited by older users (Pinterest: 30,0%, Instagram: 25,0%) than by younger users (Pinterest: 25,8%, Instagram: 20,9%).

Gender differences reveal that among frequent users, women are far more likely than men to use Instagram (29,3% vs. 16,7%) and TikTok (38,2% vs. 23,2%) for learning. Pinterest also stands out with a significant gender gap, as 33,1% of female frequent users cite it for learning compared to just 20,2% of male frequent users. YouTube, however, is equally popular among male (42,0%) and female (43,3%) frequent users, reinforcing its role as a universal learning platform.

Among frequent users, Pinterest is more popular for learning among Dutch speakers (30,7% vs. 25,1%), but other platforms show no notable language-based differences in learning-related engagement.

For young Belgians, social media is increasingly used as a learning tool. YouTube remains the most popular platform for educational content, but TikTok is rapidly gaining ground among younger users due to its short, fast-paced videos. The following quotes from young Belgians illustrate how they engage with social media for learning and information:

« Le problème, c'est que comme ils ont parlé des tutos et tout, je regarde tout sur TikTok. Je ne vais plus sur YouTube. C'est pour ça. Je fais tout sur TikTok maintenant. Sur TikTok, c'est rapide. » (16-18)

« Sur TikTok, c'est deux minutes les vidéos de base. Alors que sur YouTube, pour faire un sujet, ils peuvent prendre 20 minutes. Sur TikTok, ce n'est que deux minutes. C'est pour ça que je pars sur TikTok. » (16-18)

SOCIAL MEDIA TO KEEP UP WITH INFLUENCERS AND CELEBRITIES

Among frequent users, **staying up to date with the activities of influencers, celebrities, etc.** is a major activity. Among frequent Instagram users, 49,4% engage with influencer content, followed by 37,8% of frequent TikTok users and 37,8% of frequent X users. YouTube is also relevant in this domain, with 26,7% of its frequent users using it to stay informed about activities of influencers, celebrities, athletes, etc.

Among frequent TikTok users, younger users (16-24) are more likely (41,5%) to keep up with influencers and celebrities compared to older users (25-39: 34,2%). Similarly, among frequent YouTube users, influencer engagement is more common among younger users (30,7%) than older users (24,4%).

Gender differences are notable. Among frequent Instagram users, 55,5% of women engage with influencer content compared to 42,6% of men. Similarly, among frequent TikTok users, influencer engagement is higher among women (40,9%) than men (34,8%). YouTube shows a reverse trend, with 28,7% of male frequent users engaging with influencers compared to 24,0% of female frequent users.

There are no notable language-based differences in influencer engagement among frequent users.

The following quotes illustrate how young Belgians perceive and interact with influencers across platforms. From the discussions, it became clear that young people notice how TikTok's algorithm-driven feed makes it easier to discover influencers they don't follow, whereas Instagram requires users to actively follow influencers to see their content.

"Op TikTok kom je influencers sneller tegen, zonder dat je hen volgt. Op Instagram moet je hen echt volgen." (16-18)

« Sur Instagram, c'est plus basé sur qui tu vas suivre, mais TikTok, c'est plus ce qui est fait pour toi. Ils vont choisir ce qui est fait pour toi pour que tu le voies. » (16-18)

« Il y a des influenceurs que je ne suis que sur TikTok et d'autres que sur Snapchat. Parce que sur les autres plateformes, ils ne sont pas intéressants. » (16-18)

« Sur Instagram, ils vont faire des concepts plus investis, alors que sur Snapchat, ils vont montrer leur mode de vie. » (16-18)

"Instagram gaat vaker over de personen zelf. Een post van die persoon. TikTok is scrollen tussen video's en de persoon zelf boeit minder." (16-18)

SOCIAL MEDIA TO STAY INFORMED ABOUT EVENTS

Among frequent users, platforms like Facebook (44,5%), Instagram (32,5%), and X (32,2%) play an important role in keeping users informed about events. Among frequent Facebook users, 44,5% use the platform for **event-related information**.

Among frequent Facebook users, event-related information is slightly more relevant for older users (25-39: 45,5%) compared to younger users (16-24: 42,2%). In contrast, among frequent Instagram users, younger users (16-24) are more likely (37,9%) to stay informed about events than older users (28,7%).

Gender differences are present. Among frequent Facebook users, women (48,2%) are more likely than men (40,5%) to use it for event-related information. Conversely, among frequent X users, men (34,0%) are slightly more likely than women (27,7%) to stay up to date about events. There are no notable gender differences in event-related engagement among frequent Instagram users.

Facebook remains the leading platform for event-related information among both Dutch-speaking (45,0%) and French-speaking (43,3%) frequent users. However, Instagram and X are more popular for event updates among French-speaking frequent users (34,7% and 36,5%) than Dutch-speaking frequent users (30,1% and 27,0%).

Facebook remains a key platform for event-related information, for younger users, as the following quotes illustrate:

« C'est trop bien. Tu peux créer un événement sur Facebook et tout le monde peut dire : 'Ah ! Je participe, je ne participe pas.' Alors que sur Insta, pour faire un événement, déjà, il faut que tout le monde voie ta story. » (19-24)

« Sur Facebook, si je dis que je suis intéressée par un événement, c'est écrit sur mon fil et tout le monde a la notification que je suis intéressée par cet événement-là. » (19-24)

"Ik gebruik Facebook nog voor nieuws en om organisaties te volgen. Dat is ook handig om evenementen te vinden." (19-24)

SOCIAL MEDIA AS A NEWS SOURCE

Social media plays an important role in how frequent users **stay informed about the news**. Among frequent users, X (28,9%), Facebook (25,8%), and Instagram (26,5%) are the most commonly used platforms for news consumption. TikTok (20,8%) and YouTube (17,8%) are also emerging sources of news, though they are used less frequently for this purpose.

There are clear differences between groups in how frequent users engage with social media for news. Among frequent Facebook and X users, older users (25-39) are more likely to use these platforms for news (Facebook: 26,9%, X: 31,0%) than younger users (16-24: 23,1% and 25,5%, respectively). Conversely, among frequent Instagram and TikTok users, younger users turn to these platforms more often (Instagram: 33,8%, TikTok: 24,5%) than older users (Instagram: 21,6%, TikTok: 17,2%).

Gender differences are also present. Among frequent Facebook, Instagram, and X users, women are more likely than men to consume news on these platforms (Facebook: 29,1% vs. 22,4%, Instagram: 30,5% vs. 22,2%, X: 31,5% vs. 27,5%). Among frequent YouTube users, however, men (20,3%) rely on it for news more than women (14,3%).

Language-based differences reveal that among frequent TikTok users, French speakers (23,4%) use it more frequently for news than Dutch speakers (17,5%). Conversely, among frequent X users, Dutch speakers (31,9%) are more likely than French speakers (25,9%) to use it for news updates. Facebook and Instagram are similarly used for news across both language groups.

"Facebook gebruik ik nog om HLN te lezen, het nieuws." (19-24)

« Je suis passé d'enlever Twitter à me réfugier sur Instagram et Facebook. J'ai fait en sorte de suivre, par exemple, les médias que je suivais peut-être sur Twitter auparavant pour un peu avoir une certaine continuité dans ma manière de consommer les réseaux sociaux. » (19-24)

LINKEDIN AS A WORK-RELATED PLATFORM

Among frequent users, LinkedIn is primarily used for professional networking and job searching. 50,0% use the platform to stay informed about their professional network, 40,7% track vacancies, and 24,9% apply for jobs.

Among frequent LinkedIn users, older users (25-39) are significantly more engaged in career-related activities than younger users (16-24), with 53,1% vs. 41,6% staying informed about their professional network and 43,6% vs. 32,6% tracking vacancies. This trend likely reflects the fact that older users are further along in their career. Similarly, job applications are more common among older frequent users (26,1%) than younger ones (21,7%).

Gender differences also emerge. Among frequent LinkedIn users, women (57,2%) are more likely than men (44,9%) to stay informed about their professional network. Similarly, more women (46,2%) than men (36,8%) track vacancies, and more women (29,6%) than men (21,6%) apply for jobs.

Language-based differences show that Dutch-speaking frequent LinkedIn users are more active than French-speaking users, with 57,5% vs. 42,1% staying informed about their professional network and 27,8% vs. 21,2% applying for jobs.

POSTING UPDATES ON SOCIAL MEDIA

Among frequent users, Instagram (43,6%) and Facebook (26,3%) are the most popular platforms for **sharing content**. 22,8% of frequent TikTok users engage in posting updates, though to a lesser extent compared to Instagram and Facebook.

Among frequent Facebook users, older users (25-39) are more likely to post content (31,0%) than younger users (16-24: 14,6%). Conversely, among frequent Instagram users, posting is equally common across both younger (16-24: 44,8%) and older (25-39: 42,8%) users. On TikTok, young users (16-24: 24,4%) are slightly more likely to post than older users (25-39: 21,2%), reflecting the platform's strong presence among Gen Z.

Among frequent Instagram users, women (53,5%) post updates more often than men (32,8%). Similarly, among frequent Facebook users, more women (29,4%) than men (22,8%) share content.

Language-based differences show that Dutch-speaking frequent users post more on Instagram (47,6%) than French-speaking users (37,1%), while French-speaking frequent users post slightly more on Facebook (27,5%) than Dutch-speaking users (25,9%).

"Ik vind het vooral leuk om zelf dingen te posten. Ik post echt heel mijn leven op Instagram. Ook om te zien waar je vrienden mee bezig zijn. Beste vrienden verhalen vind ik superleuk." (19-24)

Social Media & Brands



KEY INSIGHTS

- Instagram stands out as the most popular platform for discovering and following brands, especially among 16-24-year-olds.
- TikTok remains a significant platform for brand following, with 50,2% (+5,5%) of the 16-24-year olds following brands on the platform.
- Fashion and beauty are the most popular brand categories, especially among women and younger demographics.
- More than half of the social media users use social media primarily for inspiration and prefer shopping either in physical stores or through webshops. Almost one third prefer a link that redirects them straight to the product page on the webshop.
- The majority is positive towards giveaways and discount codes.
- The willingness to pay for ad-free social media is not commonly supported: only 18,9% of the Belgians are willing to do so.

SOCIAL MEDIA AS A CRUCIAL BRAND TOUCHPOINT

Brand following on social media

83,6% of Belgians aged 16 to 39 follow brands on social media. Among younger users (16-24), this rises to 87,7%, while among older users (25-39) it's 81,4%. 58,3% of the Belgians (16-39) follow brands on Instagram, and with that, it emerges as the leading platform for **brand following**. Facebook, TikTok, and YouTube follow with respectively 43,2%, 32,0%, and 22,2%. Generational differences play a significant role: while 16-24-year-olds are far less likely to follow brands on Facebook than those aged 25-39 (22,6% vs. 54,5%), they are more engaged on Instagram (70,2% vs. 51,8%) and TikTok (50,2% vs. 22,1%). YouTube remains a relevant platform for both age groups, with one in five using it to follow brands.

In some focus group conversations with young people, it was mentioned that brand following feels less necessary on TikTok, as the algorithm already pushes brand content into their feed. As one participant put it:

"Op TikTok kom je merken sneller tegen, zonder dat je hen volgt. Op Instagram moet je hen echt wel volgen om ze tegen te komen." (19-24)

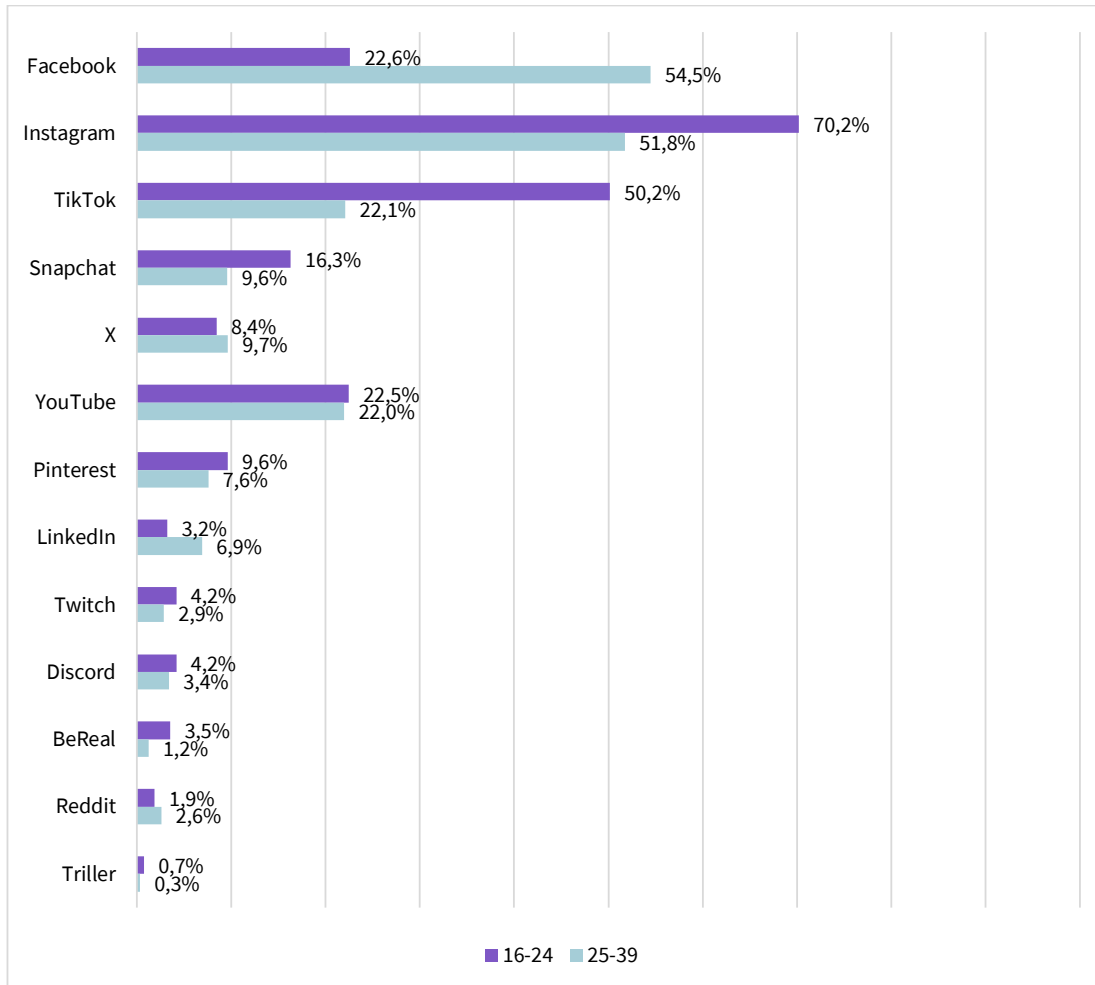


Figure 13: % of Belgians who follow brands on different social media platforms according to age group (N = 3938).

Fashion and beauty are the predominant brand categories (respectively 47,0% and 37,2%), followed by sports (32,7%) and games (30,6%). For those aged 16 to 24, we mark higher rates for those categories, respectively 51,5%, 39,4%, 34,5%, and 33,7%. For older individuals (25–39), brands in the health and pharmacy categories also represent a significant share (32,6%) of the types of brands they follow. Compared to men, women also show higher rates in fashion (62,1% vs. 32,1%), beauty (57,3% vs. 17,3%), and health brands (37,2% vs. 18,8%).

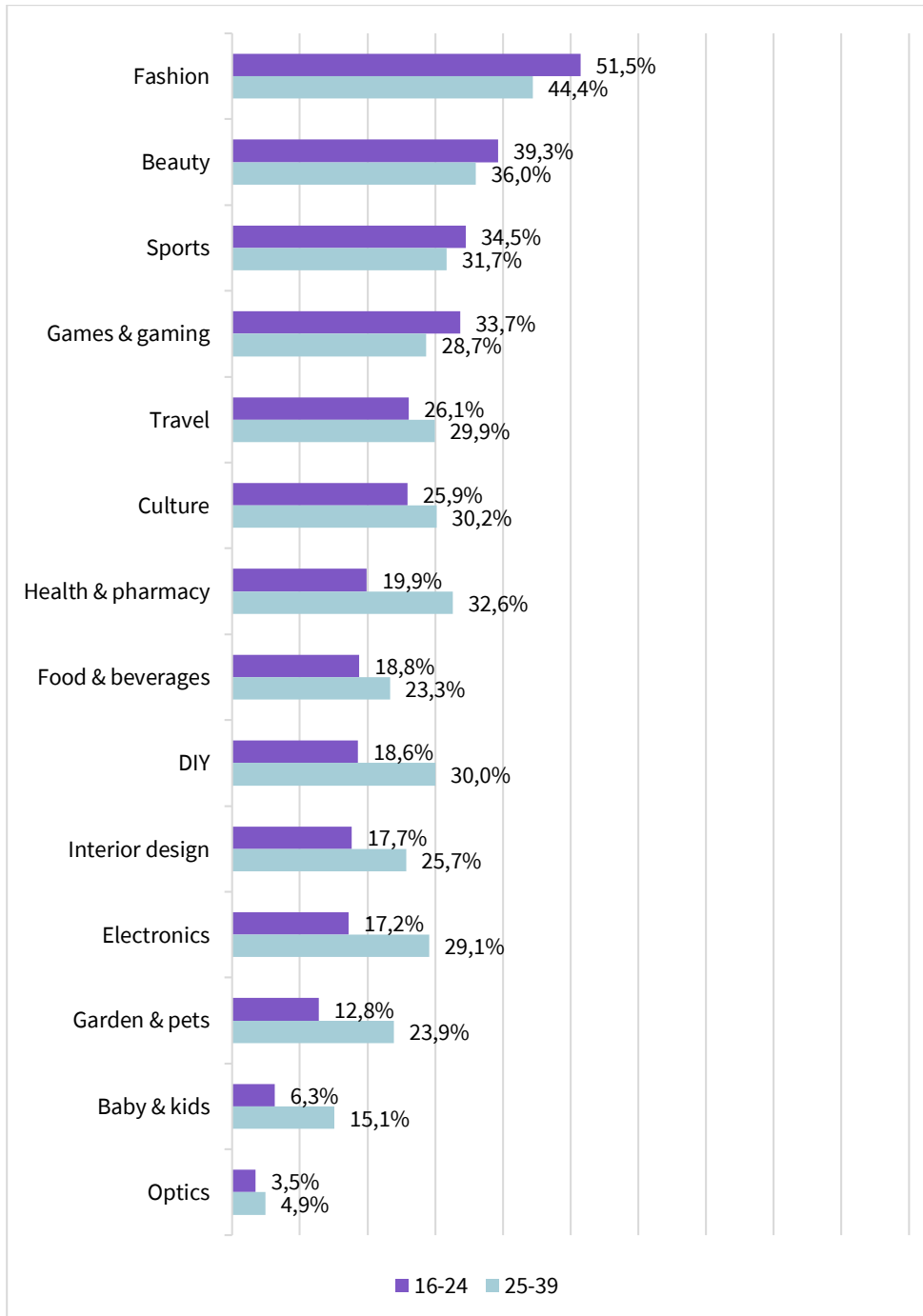


Figure 14: Following per brand category, according to age (N = 3938).

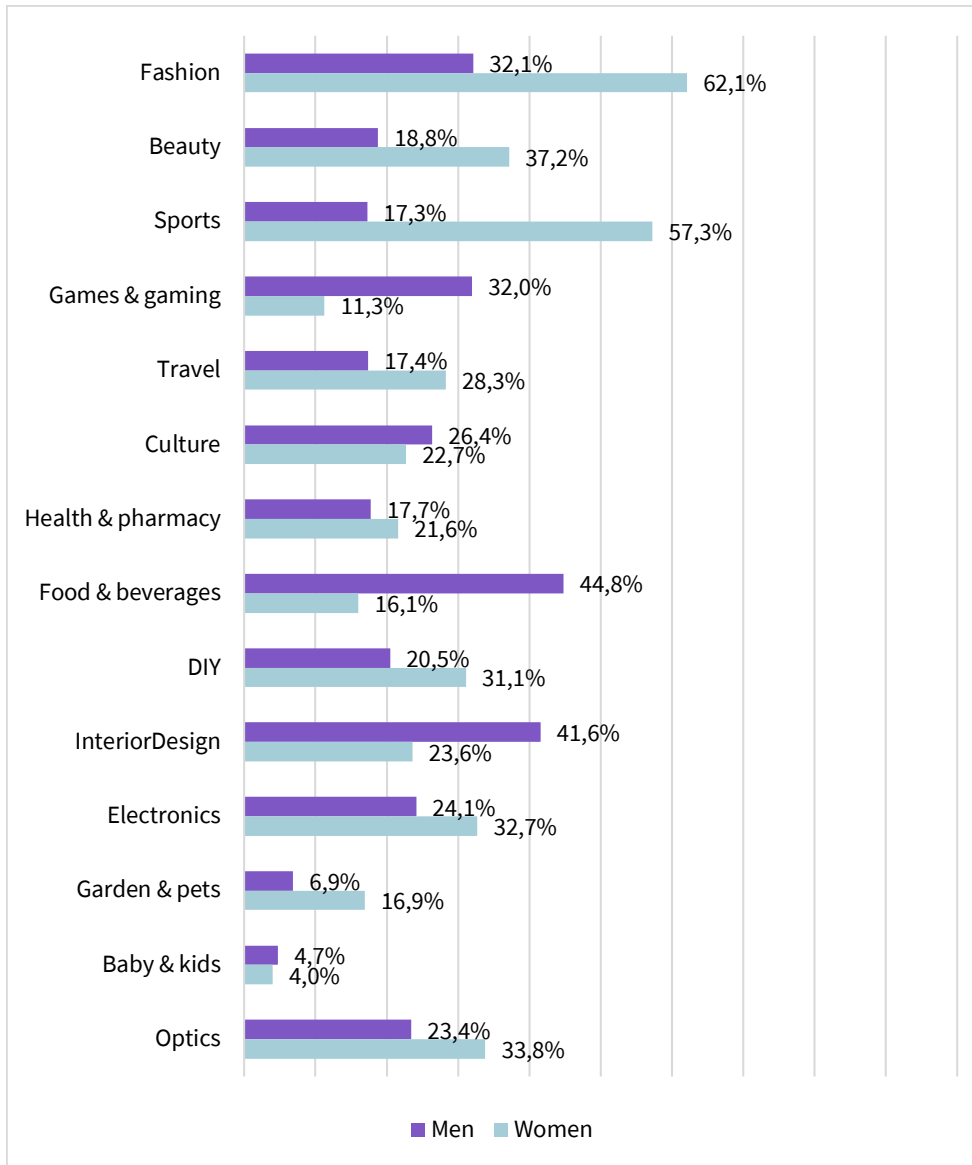


Figure 15: Following per brand category, according to gender (N = 3938).

OTHER BRAND INTERACTIONS AMONG FREQUENT SOCIAL MEDIA USERS

To understand the potential of social media for brands, we asked active social media users to select from a list of brand-related activities they had engaged in on each platform. Only frequent users—those who use a given platform at least weekly—were included in the following analyses. As such, all percentages reported in the following sections refer to the share of frequent users per platform who engaged in each activity.

Overall, **Instagram stands out as the leading platform for brand interaction**. It performs strongly in areas such as brand discovery, information search, product purchases, website redirection, and product recommendations. Notably, Instagram generally appeals to both younger and older users, with generational differences appearing only in the areas of brand discovery and product recommendations.

When looking more closely at the different types of brand interactions, we see clear platform-specific trends. For instance, for **brand discovery**, Instagram (59,6%) is the leader, followed by TikTok (51,2%). **Pinterest** also proves to be a strong platform for brand discovery, with 33,9% of users engaging in this activity. Instagram and TikTok also dominate in **brand information searches**, with 36,7% of the frequent users using Instagram to look up brand information, and 35,3% TikTok. For **product recommendations**, Instagram is again the no. 1 platform at 21,5%, followed by TikTok at 18,6%. **Website redirection** is most

common on Instagram (31,3%) and Facebook (28,5%). In terms of **product purchases**, Instagram (17,1%) and Twitch (16,3%) are the top platforms. Furthermore, LinkedIn stands out with the highest percentage of **users contacting companies** (32,1%), followed by Twitch (24,9%). Finally, when it comes to **product reviews**, Twitch (20,0%) and X (18,7%) lead, closely followed by Facebook (18,3%) and TikTok (18,0%).

Clear generational patterns emerge in how Belgians engage with brands across social media platforms (cf. Table 7). Younger users (16–24) are more active in brand discovery on visually driven platforms like **Instagram** (63,8%) and **TikTok** (57,5%) compared to users aged 25–39 (resp. 56,7% - 45,1%). In contrast, older users tend to show more diverse brand interactions across multiple touchpoints. This is especially apparent on platforms like **Facebook**, **X**, **Twitch**, and **Discord**, where 25–39-year-olds report consistently higher percentages for actions such as searching for brand information, contacting brands, and even product purchases. Remarkably, and somewhat counterintuitively, older **Snapchat** users tend to have more brand interactions than younger ones. This is evident in areas such as brand discovery (26,7% vs. 21,0%), searching for brand information (22,0% vs. 14,2%), contacting brands (20,2% vs. 11,1%) and recommending products (13,4% vs. 7,9%).

| | 16-24 | 25-39 | Total |
|--|-------|-------|-------|
| Facebook (N = 3664; 16-24: 1055; 25-39: 2609) | | | |
| Brand discovery | 38,5% | 44,0% | 42,4% |
| Brand information search | 21,1% | 31,1% | 28,2% |
| Contact with brands | 16,9% | 26,1% | 23,5% |
| Reviews | 12,0% | 20,8% | 18,3% |
| Product purchase | 9,1% | 13,7% | 12,4% |
| Clicked to website | 25,1% | 29,9% | 28,5% |
| Product recommendation to family or friends | 13,6% | 16,3% | 15,5% |
| None of the above | 28,4% | 21,1% | 23,2% |
| Instagram (N = 3777; 16-24 = 1524; 25-39: 2253) | | | |
| Brand discovery | 63,8% | 56,7% | 59,6% |
| Brand information search | 36,3% | 37,1% | 36,7% |
| Contact with brands | 23,8% | 25,2% | 24,6% |
| Reviews | 14,7% | 16,7% | 15,9% |

| | 16-24 | 25-39 | Total |
|--|-------|-------|-------|
| Instagram (N = 3777; 16-24 = 1524; 25-39: 2253) | | | |
| Product purchase | 16,8% | 17,4% | 17,1% |
| Clicked to website | 32,6% | 30,4% | 31,3% |
| Product recommendation to family or friends | 24,6% | 19,3% | 21,5% |
| None of the above | 12,9% | 17,8% | 15,9% |
| TikTok (N = 2652; 16-24: 1314; 25-39: 1338) | | | |
| Brand discovery | 57,5% | 45,1% | 51,2% |
| Brand information search | 38,0% | 32,6% | 35,3% |
| Contact with brands | 15,7% | 19,5% | 17,6% |
| Reviews | 17,4% | 18,5% | 18,0% |
| Product purchase | 15,7% | 14,8% | 15,2% |
| Clicked to website | 24,0% | 19,5% | 21,7% |
| Product recommendation to family or friends | 20,0% | 17,2% | 18,6% |
| None of the above | 18,5% | 23,3% | 20,9% |
| Snapchat (N = 2445; 16-24: 1321; 25-39: 1124) | | | |
| Brand discovery | 21,0% | 26,7% | 23,6% |
| Brand information search | 14,2% | 22,0% | 17,8% |
| Contact with brands | 11,1% | 20,2% | 15,3% |
| Reviews | 9,4% | 16,7% | 12,7% |
| Product purchase | 6,2% | 13,0% | 9,3% |
| Clicked to website | 8,2% | 11,0% | 9,5% |
| Product recommendation to family or friends | 7,9% | 13,4% | 10,4% |
| None of the above | 56,3% | 42,5% | 50,0% |

| | 16-24 | 25-39 | Total |
|---|-------|-------|-------|
| X (N = 1389; 16-24: 545; 25-39: 844) | | | |
| Brand discovery | 25,8% | 30,8% | 28,8% |
| Brand information search | 24,1% | 30,7% | 28,1% |
| Contact with brands | 17,9% | 25,0% | 22,2% |
| Reviews | 15,2% | 20,9% | 18,7% |
| Product purchase | 12,1% | 14,3% | 13,4% |
| Clicked to website | 10,9% | 18,5% | 15,5% |
| Product recommendation to family or friends | 12,5% | 14,6% | 13,7% |
| None of the above | 38,6% | 30,0% | 33,4% |
| YouTube (N = 3786; 16-24: 1397; 25-39: 2389) | | | |
| Brand discovery | 44,9% | 38,4% | 40,8% |
| Brand information search | 28,8% | 32,0% | 30,8% |
| Contact with brands | 11,1% | 12,1% | 11,7% |
| Reviews | 11,3% | 12,9% | 12,3% |
| Product purchase | 9,2% | 10,3% | 9,9% |
| Clicked to website | 17,1% | 13,8% | 15,0% |
| Product recommendation to family or friends | 9,6% | 11,3% | 10,7% |
| None of the above | 29,5% | 34,5% | 32,7% |
| Pinterest (N = 1572; 16-24: 674; 25-39: 898) | | | |
| Brand discovery | 36,3% | 32,0% | 33,9% |
| Brand information search | 21,7% | 30,6% | 26,8% |
| Contact with brands | 12,4% | 18,6% | 16,0% |
| Reviews | 10,1% | 15,8% | 13,4% |
| Product purchase | 10,3% | 14,7% | 12,9% |
| Clicked to website | 15,8% | 17,9% | 17,0% |
| Product recommendation to family or friends | 10,3% | 14,0% | 12,4% |
| None of the above | 35,1% | 28,8% | 31,5% |

| | 16-24 | 25-39 | Total |
|--|-------|-------|-------|
| LinkedIn (N = 1290; 16-24: 323; 25-39: 890) | | | |
| Brand discovery | 19,4% | 22,3% | 21,5% |
| Brand information search | 24,2% | 25,7% | 25,3% |
| Contact with brands | 30,5% | 32,7% | 32,1% |
| Reviews | 14,1% | 15,9% | 15,4% |
| Product purchase | 11,6% | 12,9% | 12,5% |
| Clicked to website | 15,3% | 16,4% | 16,1% |
| Product recommendation to family or friends | 13,0% | 13,3% | 13,2% |
| None of the above | 29,8% | 33,6% | 32,6% |
| Twitch (N = 902; 16-24: 380; 25-39: 522) | | | |
| Brand discovery | 25,4% | 32,6% | 29,6% |
| Brand information search | 22,8% | 33,6% | 29,0% |
| Contact with brands | 19,9% | 28,5% | 24,9% |
| Reviews | 16,0% | 23,0% | 20,0% |
| Product purchase | 13,9% | 18,0% | 16,3% |
| Clicked to website | 11,5% | 17,9% | 15,2% |
| Product recommendation to family or friends | 12,0% | 15,1% | 13,8% |
| None of the above | 30,6% | 21,5% | 25,3% |
| Discord (N = 1173; 16-24: 570; 25-39: 603) | | | |
| Brand discovery | 14,6% | 22,2% | 18,5% |
| Brand information search | 14,3% | 24,5% | 19,5% |
| Contact with brands | 15,4% | 22,8% | 19,2% |
| Reviews | 9,8% | 20,1% | 15,1% |
| Product purchase | 7,6% | 11,2% | 9,4% |
| Clicked to website | 9,4% | 14,3% | 11,9% |
| Product recommendation to family or friends | 11,7% | 12,7% | 12,2% |
| None of the above | 52,4% | 42,9% | 47,5% |

Table 10: Overview of brand interactions of users of that particular social media platform.

SOCIAL SHOPPING, GIVEAWAYS AND DISCOUNT CODES

When looking at the shopping habits of Belgian social media users, several patterns emerge. 45,0% of Belgian regular social media users report using social media primarily for inspiration and prefer shopping either in physical stores or through webshops. Additionally, 26,0% occasionally click through to a brand's website or webshop via a link shared by an influencer or content creator. Meanwhile, 19,4% click on products tagged in posts or stories from influencers or content creators, and 18,9% engage with ads or sponsored posts from brands.

« La semaine dernière encore, j'ai acheté des petites pièces que tu mets sur ta manette de jeu pour mieux viser. Ça m'a influencé, parce que la personne que je regarde le plus sur Twitch l'utilise aussi. Je l'ai acheté et maintenant, c'est mieux. » (16-18)

"Ik kijk vooral naar make-up en kledij. Als ze zeggen: die kledij is goed voor je als je een smalle taille hebt, dan ga ik daarnaar kijken. Of als iets mooi is, bekijk ik die website." (16-18)

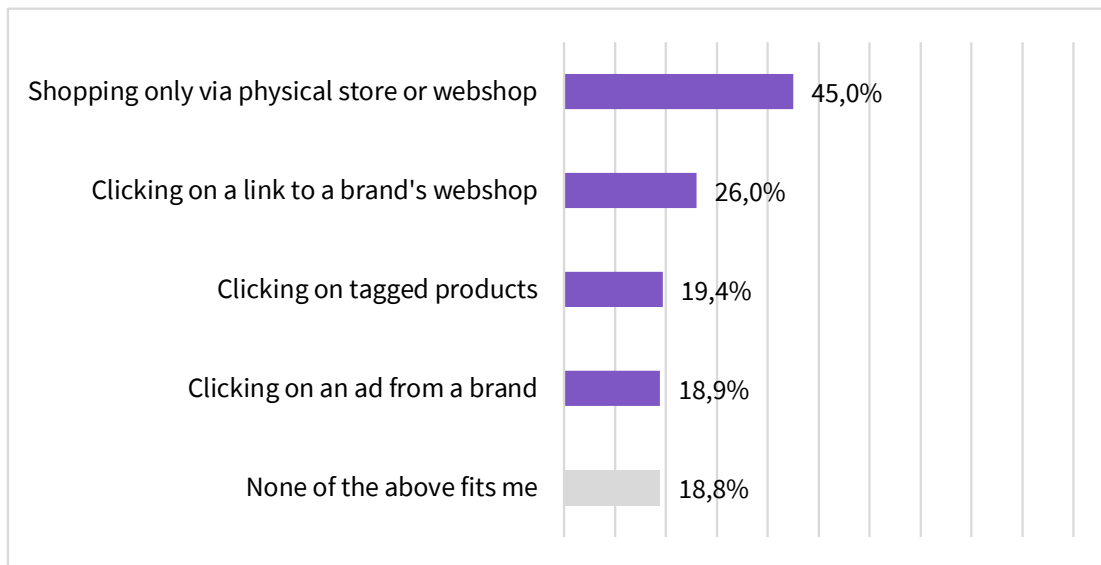


Figure 16: Social shopping behavior of regular social media users (N = 4708).

Brands are aware of these evolving behaviors and adapt their strategies accordingly. Tjorven Crevits (Colruyt Group) reflected on how different platforms serve distinct roles in the customer journey:

“In theorie is elk kanaal tegenwoordig inzetbaar over de volledige funnel. Toch zijn sommige kanalen nog steeds sterker als traffic driver. Uit campagnes weten we bijvoorbeeld dat Instagram minder sterk is om verkeer naar een website te sturen. Gebruikers klikken daar niet zo snel door, al kan dat voor bepaalde sectoren zoals fashion anders liggen. Facebook en Pinterest daarentegen zijn bewezen effectieve kanalen voor zowel traffic als conversie. TikTok evolueert momenteel sterk in die richting. Waar het oorspronkelijk vooral een upper funnel-kanaal was gericht op awareness en engagement, zien we nu met initiatieven zoals TikTok Shop dat ze steeds meer inzetten op lower funnel-doelstellingen. Ze creëren bewust meer mogelijkheden om directe sales te stimuleren. E-commerce is intussen een belangrijke inkomstenbron geworden voor de social platformen, en daarom zien we dat elk kanaal probeert in te spelen op die opportuniteit.” (Tjorven Crevits, Colruyt Group)

Pauline Grossen (Just Russel) emphasized the challenges of measuring conversions from organic social content:

“Organisch gezien proberen wij vooral te inspireren en op die manier mensen naar de website te krijgen. We doen dat met een link in bio, met af en toe specifieke offers voor mensen die ons volgen op Instagram, maar dat is heel moeilijk meetbaar. We hebben wél op het einde van onze funnel - waar mensen alle gegevens hebben ingegeven - een soort van survey en daar zien we dat heel veel mensen ook via socials komen, maar dat is heel moeilijk direct te linken. Het is niet makkelijk om mensen vanuit Instagram - zeker organisch gezien - naar onze website te krijgen. (Pauline Grossen, Just Russel)

Julie Longerstay (Lidl) echoed that sentiment, noting that organic social content primarily serves a top-of-funnel function:

“Met social organic willen we vooral brand likeability in de hand werken. Social organic heeft niet als primaire doelstelling om conversies te genereren. We willen via deze weg interactie en engagement met onze doelgroep aangaan om zo hun harten te winnen.” (Julie Longerstay, Lidl)

When it comes to **shopping preferences** on social media, 31,8% of users prefer clicking on a link that directly redirects them to the product page on a webshop. In contrast, 15,6% prefer to be directed to the brand’s webshop itself, taking a slightly broader approach by wanting to explore the brand’s full website rather than being taken straight to a specific product page. Differently, about one in five users prefer to leave social media and either visit the brand’s webshop (20,0%) or search for the product using a description in a search engine (19,3%). 10,2% prefer to take a screenshot and search for the product using an image scanner, such as Google lens. Among those who visit the brand’s webshop (N = 345), 20,5% then use the SKU number (i.e., unique article number) to locate the desired product.

« Des fois, je screen et je pars sur le site même où elle a commandé, parce qu'il y a une petite icône où tu peux scanner la photo et ça te produit directement le lien. » (16-18)

« Si j'aime bien, je vais regarder dans les commentaires. Parce que souvent, les filles vont commenter: 'S'il te plaît, je pourrais avoir la référence?' Tu vois le code, tu cliques et tu vas rechercher. » (16-18)

"Ik kijk vaak naar unboxing video's. Ik krijg dan geen pure reclame zoals op tv, maar dat zijn dan meisjes die een pakketje krijgen van Zara. Ik open dat en kijk in de reacties naar het artikelnummer, en zoek dat dan op. Ik vind dat tof om te doen." (16-18)

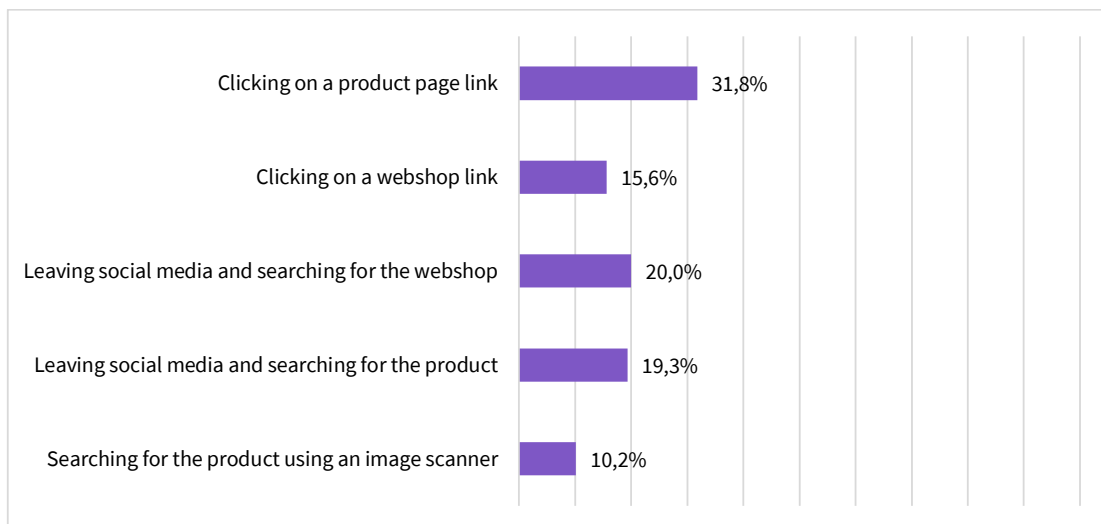


Figure 17: Social media shopping preference (N = 4708).

In Belgium, social shopping still mostly happens through external links. Users are typically redirected from social media to a brand's website to complete a purchase. While several platforms are experimenting with in-app shopping features (e.g. TikTok launched TikTok Shop in France in March 2025), these are not yet widely available locally. For brands, this evolution offers new opportunities, but also raises concerns about losing control over customer data and the overall shopping experience. Tjorven Crevits reflects on the implications of this shift:

"Ik zie opportuniteiten in TikTok Shop. De drempel om iets te kopen is extreem laag geworden: je blijft gewoon binnen de app, er is geen laadtijd van een externe website en je hoeft niets extra te installeren. Je betaalgegevens, zoals je Visa, zijn al gekoppeld, waardoor je makkelijk inspeelt op impulsaankopen. "Ik zie het, ik vind het leuk, ik koop het", zo eenvoudig is het geworden. Voor bepaalde merken biedt dat interessante kansen." (Tjorven Crevits, Colruyt Group)

In general, 56,9% of individuals have a positive attitude towards **giveaways**, while 64,9% are positive about **discount codes**. Women and young people aged 16-24 (compared to men and those aged 25+) tend to have a slightly more favorable view of both giveaways and discount codes. Additionally, Dutch-speaking individuals are slightly more positive towards discount codes than French-speaking Belgians — no significant differences were found for giveaways. Overall, 40,7% express a positive attitude toward **livestreams**. This increases to 45,6% among 16–24-year-olds, while 25–39-year-olds score 37,9%.

« Il avait donné le lien et son code promo. Je suis parti dessus, j'ai mis mon code promo. » (19-24)

"Als ik iets ga kopen, ga ik wel altijd zoeken naar een partner en dan heb ik altijd een kortingscode." (19-24)

« Moi, les concours, pourquoi je ne fais pas ? Parce qu'il faut toujours poster en story. » (19-24)

18,9% of the Belgian social media users between 16 and 39 years old is willing to pay for **ad-free social media**. There are clear differences in willingness to pay based on gender, age, and language. A significantly higher percentage of men are willing to pay—about 25,8% compared to 12,1% of women. Users aged 16-24 are more willing to pay (22,4%) than those aged 25-39 (17,0%). Additionally, French speakers are more willing to pay (22,3%) compared to Dutch-speaking people (16,2%).

« Par exemple, imaginons YouTube, je me suis rendu compte... J'avais une période d'essai pour voir comment c'était premium et je me suis rendu compte que c'était vraiment bien, ça facilitait la vie sur pas mal de choses. Quand je suis revenu à la version régulière, juste le fait qu'il y ait trop de pubs sur des vidéos de 30 ou 40 minutes. Je me suis dit YouTube, je préfère payer et avoir des avantages à plusieurs niveaux que de rester sur la version régulière. Par exemple, je vois que sur Instagram et Facebook, il y a tellement de pubs. Je ne pourrai jamais payer une version premium de Facebook ou de Insta pour ne plus en avoir. Donc à ce niveau-là, je pencherais la concession de me dire que ce n'est pas trop grave d'avoir des pubs sur ces réseaux sociaux-là. » (19-24)

BRANDS' APPROACH TO SOCIAL MEDIA IN 2025

Meta remains a core pillar, TikTok on the rise. The brands we spoke with over the past months continue to focus primarily on the Meta platforms—Facebook and Instagram—as key pillars of their social media strategies. Notably, TikTok is gaining significant ground, more so than in previous years, with brands exploring its potential to connect with younger audiences through more creative, informal storytelling. LinkedIn is occasionally used, though mainly from a corporate communication or recruitment perspective.

“Elk kanaal heeft zijn aanpak, strategie en aangepaste content nodig. Maar als merk willen we vooral slimme keuzes maken en kijken op welke platformen onze aspirationele doelgroepen actief zijn. TikTok is hierbij een essentieel onderdeel van onze socialemediastategie. Er zijn veel verschillende platformen, het is belangrijk om de juiste keuzes te maken. Het is de laatste jaren gebleken ook dat TikTok al lang geen dansjesplatform meer is en dus is het kanaal onmisbaar in onze strategie. Nu wordt TikTok relevant voor ons en daarom gaan we het integreren. Het zijn die mensen die we aan boord willen krijgen, want zij zijn de toekomst.” (Julie Longerstay, Lidl)

“Als we zien wie er de laatste maanden adverteert op TikTok, is dat al helemaal anders dan een jaar geleden. Hier zit ook de klant van de toekomst.” (Fabien Sobiecki, Famiflora)

Platform selection depends on objective, audience and context. Retailers no longer see platforms as interchangeable. Each channel serves a different role in the funnel—some drive awareness, others support consideration or conversion. Context matters more than ever.

“Bij het kiezen van kanalen kijken we in de eerste plaats naar de leeftijd van de doelgroep en de doestelling die we willen bereiken. Sommige platformen werken beter voor awareness, terwijl andere net meer geschikt zijn voor consideration, zoals voor traffic of engagement. Wat we steeds belangrijker vinden, is de context. Zeker bij een kanaal als TikTok is dat cruciaal, niet elke storytelling werkt daar even goed. Het is essentieel om na te gaan of de content en tone of voice wel passen bij het kanaal. We betrekken de context nu veel bewuster bij het bepalen van onze strategie. Door deze verschillende factoren te combineren, komen we tot de optimale kanalenmix.” (Tjorven Crevits, Colruyt Group)

“Het is niet dat we echt grote social listening-tools hebben, maar we weten wél en we monitoren zelf wél waar er veel over boeken – ons onderwerp, onze social currency - gepraat wordt en op die kanalen willen we in contact komen met onze community. Ook waar we een match zien met het aanbod dat we hebben. De BookTok community is zeer groot en vanuit Standaard Boekhandel zetten we sterk in op young adults, vandaar dat we afgelopen jaar beslist hebben om te starten met een TikTok kanaal. We hebben daar een verhaal te vertellen en willen het lezende TikTok publiek inspireren met frisse content. En dat zowel organic als paid.” (Karen Vanstaen, Standaard Boekhandel)

Organic reach is limited—paid is key to visibility. There’s a consensus among the brands we spoke with that organic reach is low, especially on Instagram. TikTok offers more potential in that area but presents its own challenges. The platform requires a very different content strategy—one that is more spontaneous, video-driven, and native to TikTok’s unique culture. Brands can’t simply recycle content from other channels; instead, they need tailored, creative approaches to truly resonate with users.

“Organic reach op Meta kanalen stelt vandaag niet veel meer voor. Bij TikTok is dat gelukkig nog anders. Daar kan je met authentieke content, al dan niet gedreven op trends, nog een heel mooi organisch bereik halen. Op Meta kanalen werken we veel meer met advertenties, waar we echt sturen op bereik en ROAS, zodat we zeker zijn dat onze advertenties bij een relevant (en koopgraag) publiek terecht komen.” (Karen Vanstaen, Standaard Boekhandel)

“We hebben het geluk dat we een love brand zijn. Als we nieuwe merken lanceren merken we wel dat we die gunfactor veel minder hebben. Dan moeten we echt meer "vechten" om ons organisch bereik te gaan krijgen. Voor de commerciële boodschappen gaan we natuurlijk wel paid inzetten. Dat is dan met een mix van dedicated paid content - een spot of iets dergelijks, die gemaakt is - of iets leuks dat wij voor organisch gemaakt hebben, waarvan we merken dat het wel goed scoort en dat het de boodschap overbrengt die we willen. Dat gaan we mee in paid steken.” (Arnaud Neyt, Studio 100)

“Wat op Meta toch 300 keer gecheckt gaat worden, is op TikTok iets lossier. Daar hoeft het niet allemaal perfect te zijn. We filmen meer UGC in plaats van high quality. We proberen heel hard native te zijn aan dat platform en ook de content van dat soort platform daar te integreren.” (Pauline Grossen, Just Russel)

“TikTok is lastig, als in content creatie en op Instagram ben je heel veel met mooie foto's. Je kan af en toe een reel laten monteren, maar TikTok zoekt meer die echte authenticiteit. Dat moet allemaal niet te afgelikt en te perfect gemonteerd zijn, maar het moet wel goed gemaakt zijn in video. Je hebt daar tijd voor nodig.” (Pieter Hens, Toerisme Oostende)

Strategic use of content per platform. Brands stress the importance of tailoring content to each platform, rather than taking a one-size-fits-all approach. That requires resources, planning, and sometimes compromise.

De tijd dat je met één bericht alle platformen kunt benaderen is voorbij. Daar geloof ik niet meer zo erg in. Je moet je gaan toespitsen per platform en daar de juiste communicatie of de juiste content op geven. (Fabien Sobiecki, Famiflora)

“Als je pragmatisch bent, - en dat hangt ook een beetje af van de druk op het team - ga je soms geen onderscheid gaan maken. Dan ga je vooral gaan kijken vanuit één leading platform - wat vandaag Instagram is - en dan de vertaalslag maken naar andere kanalen. Het is wél de bedoeling dat we de komende weken, maanden net iets meer TikTok-campagnes gaan maken die echt dedicated voor TikTok zijn en dan gaan we die vertaalslag maken naar andere kanalen, niet omgekeerd.
(Jaan Dekempeneer, Wondr)

“De mensen die ons organisch volgen op onze eigen social accounts zijn voornamelijk klanten. Daar moeten we een heel ander soort approach of strategie doen dan in de paid content, want dat is vooral acquisitie, terwijl het voor onze bestaande klanten organisch voornamelijk inspiratie is, value bieden.”
(Pauline Grossen, Just Russel)

Decline of X. Among the few brands that were actively using X in the past, many have since reduced or completely stopped their presence on the platform. Concerns around brand safety, lack of content moderation, and the unpredictable nature of the platform since its takeover were frequently mentioned.

“Je moet altijd de impact afwegen versus de effort die je erin steekt. De community is voor ons daar te klein.” (Karen Vanstaen, Standaard Boekhandel)

“Anderhalf jaar geleden hebben we besloten te stoppen met adverteren op X, vlak nadat Elon Musk het platform had overgenomen. Toen werd de factchecking niet meer uitgevoerd, wat voor ons een groot risico was voor brand safety. We wisten niet meer welke content er naast onze advertenties zou verschijnen, en dat was voor ons een belangrijke reden om niet verder te adverteren op het kanaal. Brand safety is cruciaal voor een merk. Het is essentieel dat de informatie die naast je eigen content verschijnt correct is. In de verkeerde context kan een boodschap namelijk totaal anders overkomen.” (Tjorven Crevits, Colruyt Group)

“X gebruiken we steeds minder. De berichten die je daar het vaakst voorgeschoteld krijgt zijn meestal rond politiek of bevatten expliciete content. Waardoor het platform steeds minder geschikt is voor ons.”
(Arnaud Neyt, Studio 100)

“X is een andere richting ook uitgegaan en is minder relevant om actief op te zijn, denk ik.”
(Pieter Hens, Toerisme Oostende)

UGC is valued, but not always easy to activate. User-generated content is still seen as powerful, especially for building trust and authenticity. However, most brands acknowledge that truly spontaneous UGC doesn't happen at scale. Encouraging users to share content organically takes time and consistent effort, and the volume is often unpredictable.

“Sowieso zit er in - ik denk - de eerste of de tweede levering altijd een flyer van: volg ons op social en tag ons in jullie leuke post. Wij verloten elke maand een hondenbedje onder de mensen die ons hebben getagd in content, met natuurlijk de bedoeling dat mensen keiveel over ons posten. Dat is een goede tactiek en techniek - denk ik - om dat te doen. Daarnaast, als iemand ons tagt en het superleuke content is en wij dat zien passeren, vragen wij heel vaak: kan je ons misschien die content opsturen? Dat zouden wij heel leuk vinden om iets mee te doen. We gebruiken zeker ook UGC-content voor onze organic posts of soms ook voor paid content. Dan moeten we natuurlijk overeenkomen en dan geven we vaak ook een extra speeltje of iets extra lekkers in de volgende levering van die klant. Het is superleuk om ook de authentieke verhalen van onze klanten te kunnen meenemen in alle content die we hebben. Dat proberen we actief te doen.” (Pauline Grossen)

“We proberen dat te activeren, maar het is niet zo eenvoudig. Het lijkt allemaal heel logisch, maar het vergt nogal wat energie. We werken bijvoorbeeld met een online platform waarbij de klanten hun planten of hun aankopen thuis kunnen fotograferen en delen met een bepaalde tag. [...] Maar het is heel moeilijk om dat los te krijgen. Ik dacht dat dat gemakkelijker ging gaan. (Fabien Sobiecki, Famiflora)

“We hechten veel waarde aan de content die over Lidl wordt gedeeld, zowel negatief als positief. Wanneer mensen ons noemen of taggen, zorgen we ervoor dat we altijd in interactie met hen gaan. Dit helpt ons om de band met ons merk te versterken en bij te dragen aan de brand likeability. Ons doel is om Lidl te personifiëren en de connectie met onze doelgroep te verdiepen. Hoewel we nog niet actief bezig zijn met het opnieuw inzetten van door UGC content, reposten we wel regelmatig stories. Dit is een stap in de richting van een sterkere merkbeleving.” (Manou Wauters, Lidl)

“Vroeger was UGC letterlijk user-generated content, was je vooral mensen aan het stimuleren om voor jou content te maken. Vandaag kan dat nog altijd, maar dat is niet schaalbaar. Dat is niet iets waarop je kan gaan rekenen dat die content er zal komen. De schaalbaarheid of het volume waarin wij content maken, is niet hetzelfde. Wij vragen mensen om soms content te maken voor ons, puur uit goodwill, maar je kunt dat niet doen aan hetzelfde tempo. Vandaag is UGC content die je laat maken door content creators die je product vaak zelf gaan gebruiken, maar daar zit een laag commerce tussen. Het zou heel raar zijn om iemand te betalen voor een negatieve review.” (Jaan Dekempeneer, Wondr)

Agility and data are essential. Brands value social media for its immediate feedback loop. Data guides decision-making, and content is constantly adjusted based on performance.

“Wij volgen alles heel nauwgezet op. Dat is natuurlijk het handige aan social: alles is beschikbaar van data. Je kunt alles zien: wat het voor bereik genereert, hoeveel likes er zijn, of er veel engagement is of minder. Uit elke post leer je weer iets wat je kan toepassen op andere posts.”

(Safia Machbouaa, Play Media)

Influencer Marketing



KEY INSIGHTS

- 73,3% of Belgians aged 16 to 39 follow influencers, content creators, or celebrities on social media. Women and younger individuals (16-24) are more likely to do so, as well as French-speaking Belgians compared to Dutch speakers.
- Instagram remains the most popular platform for following influencers.
- Support for brands using influencers for commercial purposes has dropped by 11,4% from last year to 58,5%. However, younger audiences (16-24) remain more receptive (67,9%) than older ones (53,1%).
- Transparency in influencer marketing remains crucial. 6 out of 10 respondents believe influencers should disclose paid collaborations.
- 47,2% of Belgians (16-39) who follow influencers, have discovered a product through an influencer, with younger individuals (16-24) being significantly more likely to look up brand information, follow a brand, or make a purchase based on influencer recommendations.
- More than 6 out of 10 believe that influencers, content creators, and celebrities should disclose when their posts are AI-generated.
- Awareness of virtual influencers has grown (+3,8%), with 15,1% of Belgians following them. However, only 20,9% of Belgians aged 16 to 39 support their use in brand communication, with demand for transparency being high (74,2%).

THE COMMERCIAL IMPACT OF INFLUENCERS

A total of 73,3% of Belgians aged 16 to 39 report following influencers, content creators, or celebrities on social media. Women are more likely than men to do so, with 74,9% of women following influencers, content creators and/ or celebrities compared to 71,6% of men. Age also plays a significant role: 83,9% of 16- to 24-year-olds follow influencers, content creators, and/ or celebrities whereas this drops to 67,5% among those aged 25 to 39. Additionally, linguistic differences emerge, with French-speaking Belgians following them more frequently (75,1%) than Dutch-speaking Belgians (71,6%).

What stood out during the interviews was that some participants expressed little to no interest in influencer content. Some young people mentioned that they rarely follow influencers because they do not feel engaged by what they share. Additionally, the algorithms on platforms like TikTok and Instagram, particularly TikTok's For You page, are so well-tailored to their preferences that following specific profiles feels almost unnecessary.

« Moi, j'en suis quand même beaucoup, mais après, je me lasse parce qu'ils n'interagissent pas assez avec nous ou je ne sais pas, c'est toujours pareil. Alors, je me dis : 'Non, toi, tu dégages', puis je suis quelqu'un d'autre. » (19-24)

"Ik volg niet zoveel influencers. Ik heb daar ook geen nood aan. Ik probeer mensen te volgen die bijvoorbeeld een gezonde levensstijl promoten. Maar geen Jade Anna die toont hoe perfect haar leven is. Ik heb daar geen nood aan." (16-18)

« Je ne suis pas beaucoup d'influenceurs, parce que je m'en fous de ce qu'ils me racontent. » (19-24)

"Ik volg influencers op Instagram en minder op TikTok. Instagram gaat vaker over de personen zelf, terwijl TikTok meer gaat om de video's en de persoon zelf minder boeit." (16-18)

Similar to last year, Instagram remains the most popular platform for following influencers, content creators, and/or celebrities (69,1%). The following chart shows the percentage of respondents, per platform, who indicated that they follow influencers, content creators, and/or celebrities on that platform. This was a multiple-response question, allowing respondents to select multiple platforms. Only those who stated that they follow influencers, content creators, and/or celebrities were able to answer this question. Similar to social media use, those aged 25-39 are more likely to follow influencers on Facebook (35,2% vs. 14,6%), while younger individuals (16-24) show higher follow rates on TikTok (57,9% vs. 27,9%), YouTube (47,6% vs. 32,9%) and Snapchat (24,6% vs. 12,3%).

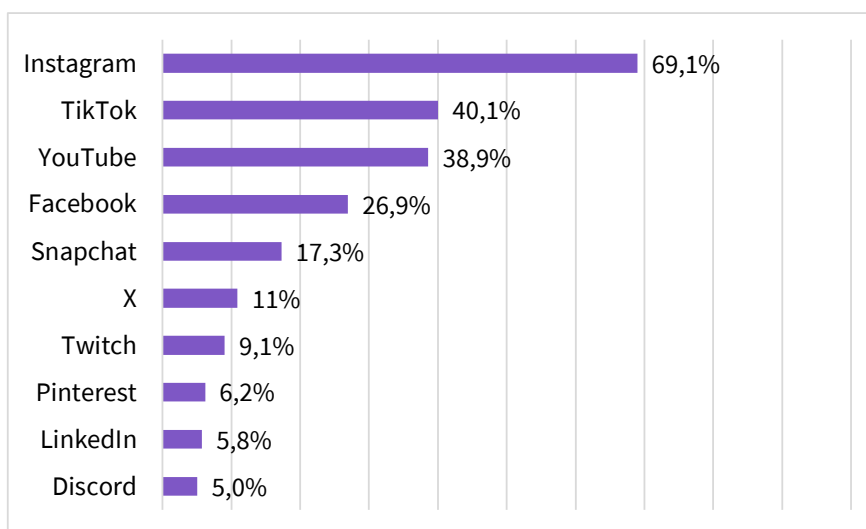


Figure 18: Social media platforms on which influencers, content creators, and celebrities are being followed (N = 3456).

Compared to last year, fewer people believe that using influencers, content creators, or celebrities for commercial purposes is a good idea (58,5%, -11,4%). However, support for this strategy is higher among 16-24-year-olds (67,9%) than among the older age category (53,1%). Transparency remains crucial, with 62,9% of respondents considering it important to very important that influencers disclose when they are being paid or receiving free products for their content. Moreover, a significant majority (73,8%) believe it is important that influencers personally test the products they promote (18-24: 76,1% vs. 25-39: 72,5%).

Opinions on influencer collaborations vary. While some see no issue with it, others feel that excessive advertising reduces the credibility of influencers. The following quotes of our young interviewees shed light on different perspectives:

"Er is daar niets mis mee." (16-18)

"Er is één specifieke influencer waarvan we weten dat die grappige reclame maakt, en daar kijk ik altijd naar [Pieter Valley uit Nederland]." (16-18)

"Ik vind het stom als een influencer reclame maakt waarbij het super obvious is dat het reclame is. Dan heeft die video niet zoveel inhoud." (16-18)

"Er zijn mensen die het in je gezicht duwen. Overdreven. Dan zou ik het al zeker niet kopen. Als het veel reclame is dan ga ik die ook ontvolgen." (16-18)

"Ik vind dat niet zo fijn. Veel influencers krijgen heel veel producten gratis toegestuurd en dan maken ze daar content over. Maar dat betekent niet dat die persoon dat leuk vindt of dat dat echt matcht. Dat vind ik jammer. (...) Zij posten zoveel 'dit is geweldig en dit', maar dat is geen echte content." (19-24)

"Sommige influencers maken een grappig verhaaltje. Dat is dan een beetje slukreclame waarin je toch wel een product ziet. Het kan ook evengoed een video zijn die bij hen past." (19-24)

Furthermore, during the interviews youngsters emphasized that credibility is a crucial factor in influencer marketing. When influencers accept too many partnerships or promote irrelevant products, they quickly lose trust. The statements below illustrate this issue.

"Je hebt influencers die alles aanpakken wat er wordt aangeboden. Je ziet dan meerdere video's op een dag van diezelfde influencer. Dan is het voor dat product en dan weer voor een ander. Voor mij is jouw geloofwaardigheid dan nul." (19-24)

« Ça peut être bien comme mauvais, parce que des fois, vu qu'ils sont payés, bien que le produit soit mauvais, ils vont quand même le promouvoir et certaines personnes auront de mauvaises expériences avec. Des fois, tu ne reçois pas ce qu'ils présentent et c'est souvent comme ça. » (16-18)

« Quand une marque approche un influenceur, je pense que le devoir de l'influenceur, c'est de tout faire pour vendre le produit. C'est ça que je n'aime pas trop chez les influenceurs parce qu'ils sont prêts à te faire vendre un produit qui est médiocre, mais ils vont te le vendre parce qu'ils sont payés. C'est pour ça. » (16-18)

"Als het een influencer is die ik geloofwaardig vind, bijvoorbeeld iemand die al heel lang dezelfde schoenen draagt, dan geloof ik wel dat hij ze echt goed vindt. Maar als iemand ineens alles promoot, dan niet." (19-24)

« Après, il y en a qui sont plus consciencieux sur le choix de leur partenaire. Il y en a qui font des partenariats avec n'importe qui. Il y en a d'autres, ils ne vont pas mettre en avant les choses qui vont à l'encontre de leurs valeurs. » (19-24)

Influencer marketing continues to prove itself as an effective strategy for brands. Nearly half (47,2%) of Belgians aged 16 to 39 discovered a product through a social media personality. Additionally, 43,1% reported looking up brand information after seeing a post from an influencer. Furthermore, 32,5% admitted to starting to follow a brand, and 28,9% to purchasing something in the past three months due to an influencer's recommendation.

When examining the differences across age, gender, and language groups, several findings emerge. Overall, younger individuals (16-24 years) are more likely to take be influenced by influencer content compared to those aged 25 to 39. For instance, in the past three months, 51,1% of 16-24-year-olds have searched for brand information due to an influencer post, whereas the percentage drops to 38,6% among the older group. Moreover, 57,3% of the younger age group discovered products due to influencer content in the last three months, compared to only 41,5% of those aged 25-39. A similar trend is observed in purchasing behavior: 34,3% of the younger group (16-24) has bought a product based on influencer content, compared to 25,9% of those aged 25 to 39. There are also gender differences: men seem more influenced by commercial content from influencers, particularly in product purchases (30,6% vs. 27,5%) and brand following on social media (35,3% vs. 29,9%). Similar to last year, French-speaking Belgians continue to show a higher tendency to purchase a product or service (35,3% vs. 23,7%), follow a brand on social media (38,2% vs. 27,8%), and seek additional brand information (49,2% vs. 38,1%).

| | 16-24 | | | 25-39 | | |
|------------------------------|-------|-------|-------|-------|-------|-------|
| | Men | Women | Total | Men | Women | Total |
| Brand discovery | 57,5% | 57,7% | 57,3% | 41,3% | 41,7% | 41,5% |
| Looking up brand information | 52,8% | 49,9% | 51,1% | 38,7% | 38,5% | 38,6% |
| Following a brand | 39,8% | 36,6% | 38,0% | 32,6% | 26,3% | 29,4% |
| Buying a product | 35,2% | 34,1% | 34,3% | 27,9% | 23,9% | 25,9% |

Table 11: Conversion in response to influencer content: age versus gender (N = 4418).

| | 16-24 | | | 25-39 | | |
|------------------------------|-------|--------|-------|-------|--------|-------|
| | Dutch | French | Total | Dutch | French | Total |
| Brand discovery | 56,4% | 58,5% | 57,3% | 37,7% | 45,9% | 41,5% |
| Looking up brand information | 45,9% | 57,7% | 51,1% | 33,4% | 44,6% | 38,6% |
| Following a brand | 32,5% | 45,3% | 38,0% | 25,1% | 34,4% | 29,4% |
| Buying a product | 28,8% | 41,4% | 34,3% | 20,5% | 32,0% | 25,9% |

Table 12: Conversion in response to influencer content: age versus language (N = 4418).

Figure 19 shows the evolution of conversions in response to influencer content from 2020 to the present. It shows that while information-seeking slightly decreases, brand following and purchases driven by influencer content gradually increase.

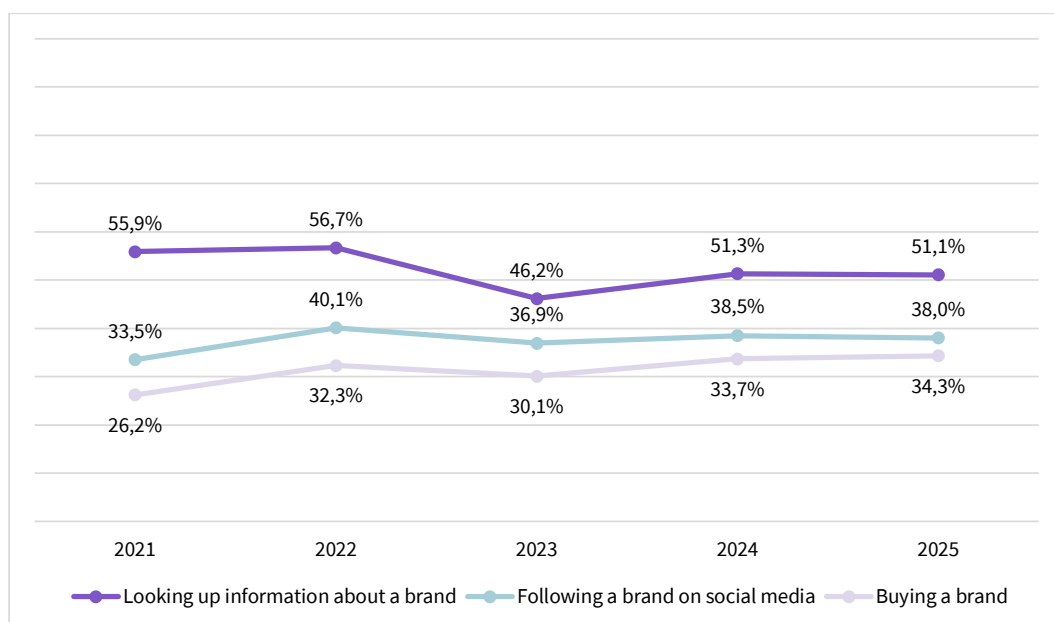


Figure 19: Evolution of conversion in response to influencer content among Belgian young people (16-24).

INFLUENCER MARKETING ACCORDING TO BRANDS

Influencer marketing has become an essential, yet increasingly complex part of the digital marketing mix. While the potential is clear, several interviewees point out that it takes time, effort and a good match to make it work. Most marketers agree: when it's done right, influencer marketing remains one of the most powerful ways to connect with people in an authentic, human way.

“Als marketeer kun je gaan aankondigen dat Famiflora de grootste, de beste, de best bereikbare, de beste kwaliteit - whatever - is, zoals elke gezonde onderneming dat communiceert, maar als het uit de mond van iemand buiten Famiflora komt, denk ik dat je duizendmaal meer scoort qua geloofwaardigheid, qua credibiliteit...” (Fabien Sobiecki, Famiflora)

“Influencers zijn voor ons een waardevol middel om een sterkere connectie te leggen binnen bepaalde communities waarin onze aspirationele doelgroep zich bevindt. Via influencer marketing kunnen we nieuwe segmenten bereiken met potentiële Lidl-fans die we vandaag misschien nog niet aanspreken. We hopen dit volgend jaar verder uit te breiden.” (Manou Wauters, Lidl)

“Influencermarketing is heel belangrijk voor Etam. Het is niet het allerbelangrijkste, maar wij geloven wél dat het voor consumenten en voor merken vandaag onmisbaar is.” (Alice De Ley, Etam)

Authenticity first: the power of real alignment. Many brands mentioned authenticity is key. A collaboration only works when there's a real connection between the influencer and the brand—both in content and in values.

“We gaan dat in content creators ook altijd wel zoeken, die match met Oostende. We gaan heel vaak kijken: is die man of vrouw hier al geweest? Nee, dat is een persoon die altijd naar Nieuwpoort gaat, dus dan gaan we dat niet doen. De geloofwaardigheid van iemand die constant in Nieuwpoort zit en dan zegt: ik vind Oostende de tofste badstad, dat gaat niet. Dus we gaan daar wel altijd zoeken: voelen we Oostende in die persoon? Als we dat niet voelen, gaan we dat niet doen.” (Pieter Hens, Toerisme Oostende)

“Voor ons is het essentieel dat onze brand ambassadors authentiek zijn en aansluiten bij ons DNA. We zoeken mensen met een positieve mindset die niet alleen ons merk begrijpen, maar ook hun volgers weten te enthousiasmeren over Lidl. De selectie van onze influencers gebeurt zorgvuldig, waarbij we nadruk leggen op een natuurlijke match met ons merk. De personen die we kiezen, willen we niet zomaar als influencer, maar echt als ambassadeurs positioneren. We zijn immers een atypische supermarkt, een discounter met een uniek verhaal. Authenticiteit staat bij ons centraal, en dat willen we weerspiegeld zien in de mensen die Lidl vertegenwoordigen.” (Julie Longerstay, Lidl)

“Dat is voor ons belangrijk, iemand die echt achter ons product staat. [...] Wij merken dat het nu meer en meer voor het geld is en dat het vaak is: als jullie mij zoveel betalen, dan misschien wél. Dat vind ik een jammerlijke evolutie. Ik snap het. Iedereen moet betaald worden, maar het gaat soms echt over extreme bedragen die geen sense meer maken of niet echt in verhouding zijn met de video, ook de livespan van die video, want laat ons eerlijk zijn: een video op Instagram - een Reel - is één week relevant, maar daarna ziet niemand die nog.” (Pauline Grossen, Just Russel)

“Influencers zijn voor ons een waardevol middel om een sterkere connectie te leggen binnen bepaalde communities waarin onze aspirationele doelgroep zich bevindt. Via influencer marketing kunnen we nieuwe segmenten bereiken met potentiële Lidl-fans die we vandaag misschien nog niet aanspreken. We hopen dit volgend jaar verder uit te breiden.” (Manou Wauters, Lidl)

“We vinden het heel belangrijk dat ze als ambassadrice echt consument zijn bij Etam. Naast een aantal afgesproken momenten, willen we dat ze ook organisch posten over bijvoorbeeld de kousenbroeken die ze aanhebben of een nieuw setje dat ze gekocht hebben. Het is een combinatie, omdat we denken dat dat de meest authentieke manier is. [...] We willen dat de influencers fan zijn van het merk en dat delen met hun volgers.” (Alice De Ley, Etam)

Trusting creators to do what they do best. Discussions with brands show a clear shift in how they approach influencer marketing: influencers are skilled content creators who understand their audience better than anyone. Instead of strict scripts, brands often provide clear guidelines—such as which products to feature—but leave the tone, format, and creative approach up to the influencer. The result is content that feels more natural, more engaging, and ultimately, more effective.

“Heel vaak zie je dat content creators beter zijn in één bepaald medium en dan moet je die ook zo gaan inzetten.” (Jaan Dekempeneer, Wondr)

“Vaak geven wij meteen onze goedkeuring. We vinden het heel belangrijk dat ze zelf staan achter wat ze posten en dat het past in hun feed. [...] Zij weten voor hun eigen audience wat er best past op hun account. We geven ook die vrijheid. Onze insteek is vaak: we willen deze producten terugzien en hoe je de content maakt, is up to you.” (Alice De Ley, Etam)

One-offs vs. long-term partnerships. Many of the brands we interviewed emphasize the value of long-term influencer partnerships, highlighting consistency, authenticity, and a stronger brand-creator alignment. Some actively invest in multi-campaign collaborations, treating influencers as true brand ambassadors. At the same time, one-off collaborations remain an important tactic—particularly for brands focused on growth and reaching new or untapped audiences. Depending on their objectives, brands often balance long-term collaborations with emerging talent.

“Wij zetten niet in op eenmalige samenwerkingen, maar altijd op minstens twee à drie campagnes. We zetten in op samenwerkingen van minstens een jaar met veel van onze influencers. Met sommige influencers werken we zelfs al vier tot vijf jaar samen. We geloven echt in de kracht van ambassadeurs, omdat dit nauw aansluit bij de waarden van onze merken.” (Tjorven Crevits, Colruyt Group)

“In principe wil iedereen een langetermijnsamenwerking, maar onze focus is vooral nieuwe klanten. Als je op een bepaald moment het gros van één iemands publiek een beetje bereikt hebt, dan heb je het ook wel een beetje bereikt. Het is niet zo dat we met megaveel influencers heel lange samenwerkingen hebben.” (Jaan Dekempeneer, Wondr)

“We hebben bepaalde langetermijnsamenwerkingen. Dat zijn mensen die echt al veel kennis hebben over ons product, die ook al wat verder staan in het channel in het algemeen, die die ook klant zijn geworden. We laten die dan regelmatig posten, wat superfijn is. Anderzijds zoeken we nog altijd naar die nieuwe mensen, die nieuwe jams, de mensen die nu hot en happening zijn, die nu viral aan het gaan zijn op TikTok, om die ook binnen te halen.” (Pauline Grossen, Just Russel)

Measuring performance. Influencer marketing may feel personal, but it still needs to deliver. Most brands keep a close eye on the performance—clicks, conversions, cost per view—and use that data to decide who they keep working with.

“We werken sowieso met kortingscodes bij alles wat online komt van influencers, - alles van barbers tot paid - omdat dat de beste manier is om dat te kunnen tracken als het gaat over barbers. Voor alle betaalde samenwerkingen vragen wij achteraf alles van statistieken op, zodat we een idee hebben van het bereik. Dan is er ook de link die ze delen in de stories, waar we ook tracken: hoeveel mensen zijn er op de website gekomen via hen? Hoeveel mensen hebben geconverteerd via hen of hebben we kunnen retargeten via hen? Dat zijn ook allemaal metrics waar we mee bezig zijn als het gaat over influencer-marketing.” (Pauline Grossen, Just Russel)

“Uiteindelijk moeten ze zich altijd bewijzen als je een overeenkomst hebt. Voor wat hoort wat. Na iedere campagne evalueren we en dan pas kun je zeggen: oké, de volgende keer zeker mee te nemen of niet.”
(Fabien Sobiecki, Famiflora)

Professionalization. As influencer marketing grows, the landscape is changing. Collaborations that once started over a DM now involve negotiations, managers taking over communication and rising fees.

“Alles wordt soms tot in het detail genegotieerd, waardoor ik denk: waarover zijn we bezig? Ik wil enkel twee stories doen. Ik zeg: oké, maar wij denken dat je er zeker drie nodig hebt om het product ongeveer goed uit te kunnen leggen. Ah nee, ik wil er maar twee doen. Oké, als jij denkt dat dat gaat lukken, maar dan denk ik: goh, waarover zijn we bezig? Er komen véél meer eisen vanuit de influencers.” (Pauline Grossen, Just Russel)

“Jammer genoeg willen managers al het contact met de influencer overnemen. Ze beheren de mailbox alsook het WhatsApp-contact. [...] Voor ons als merk is het vaak moeilijk om erdoor te boren en om tot een overeenkomst te komen. Alles moet tot in de puntjes besproken worden met die agenten, wat ook correct is, maar vroeger was het vaak organischer, via een whatsappje of zelfs een Instagram DM. Dat is - niet bij alle influencers, maar bij bepaalde influencers - moeilijker aan het worden. Die shift merken we.”
(Alice De Ley, Etam)

“Toen we vijf, zes jaar geleden met een influencer bezig waren, konden we nog werken met tegoedbonnen of met cadeaucheques voor de winkel. Van diezelfde profielen krijgen we nu facturen van € 2000 à € 3000, voor één post en een Reel. (Fabien Sobiecki, Famiflora)

Personal contact still matters. Still, it was mentioned that a personal connection can make a big difference—even in an increasingly professionalized environment. When influencers get to know the people behind the brand, the barrier often becomes lower, and collaborations feel more genuine. Influencer marketing remains deeply relationship-based.

“Ik denk dat wanneer influencers het gezicht achter het merk leren kennen, ze zich meer verbonden voelen en de drempel lager wordt. Ze werken liever voor een merk als ze het gevoel hebben direct contact te hebben met de mensen van het merk, in plaats van via een agency. Op dit moment gebeurt het nog vooral via het agency, maar we proberen die drempel te verkleinen. We nemen bijvoorbeeld zelf deel aan evenementen waar influencers aanwezig zijn, zodat we persoonlijk met hen kunnen praten. Daarnaast plannen we meetings of calls aan het begin van het jaar om dichterbij de influencers te staan. We proberen ons meer open te stellen en directer contact te leggen.” (Tjorven Crevits, Colruyt Group)

“Je bent veel meer bezig met mensen eerder dan met bedrijven. [...] Op den duur worden dat zowat goede kennissen of zo en dan wil je elkaar niet teleurstellen, maar soms moet je ze aan de businesskant teleurstellen.” (Jaan Dekempeneer, Wondr)

INFLUENCERS SHAPE OUR BEHAVIOR AND LIFESTYLE

Beyond their commercial influence, influencers also play a significant role in shaping behavior and lifestyle choices. Using a multiple-choice questionnaire, we sought to measure the extent to which people are influenced by influencers, content creators, and celebrities on social media. Participants were asked about various lifestyle aspects, including exercising more frequently, adopting healthier eating habits, changing their fashion style, investing money, exploring new hobbies, gaming, traveling more, prioritizing mental health, and even seeking psychological support. 71,9% admitted to being influenced to change their lifestyles and behaviors (+0,7%). On average, they selected two out of the options presented.

It is clear that the impact of influencers mainly lay down in eating and exercise habits. Respectively 35,1% and 32,0% of the Belgians (16-39) indicate that they have been influenced to eat healthier and exercise more because of influencer content. Additionally, 17,9% invests or manages their budget, 17,8% of respondents dresses differently, and 17,4% are influenced to game. Furthermore, 16,1% prioritize mental health, 14,9% are motivated to travel, 13,1% seek psychological help, and 12,8% start a new hobby. When looking at **age differences**, it can be noted that younger individuals (16-24; 83,9%) are more influenced across most categories compared to the older age group (25-39; 65,1%).

Compared to last year, these numbers remain relatively stable, except for the impact on travel behavior (-3,1%) and exercising (+2,8%).

| | 16-24 | 25-39 | Total |
|------------------------------|-------|-------|-------|
| Exercising more | 41,3% | 26,7% | 32,0% |
| Eating healthier | 39,6% | 32,6% | 35,1% |
| Seeking psychological help | 15,9% | 11,5% | 13,1% |
| Investing or managing budget | 20,9% | 16,1% | 17,9% |
| Gaming | 21,2% | 15,2% | 17,4% |
| Dressing differently | 24,2% | 14,2% | 17,8% |
| Starting a new hobby | 17,1% | 10,3% | 12,8% |
| Prioritizing mental health | 19,0% | 14,4% | 16,1% |
| Traveling | 19,0% | 12,6% | 14,9% |
| Other | 0,8% | 0,6% | 0,7% |
| None | 16,1% | 34,9% | 28,1% |

Table 13: Influence of social media personalities on behavior of Belgians (16-39; N = 4418).

Also **gender differences** play a role. That is, men tend to be more influenced across several categories compared to women (70,7% vs. 67,5%). For instance, they show higher percentages in areas like exercising, investing budget, gaming. In contrast, women are more influenced in eating healthier, dressing differently, starting a new hobby, and prioritizing mental health.

| | Men | | | Women | | |
|------------------------------|-------|-------|-------|-------|-------|-------|
| | 16-24 | 25-39 | Total | 16-24 | 25-39 | Total |
| Exercising more | 43,3% | 31,5% | 35,8% | 40,2% | 22,2% | 28,5% |
| Eating healthier | 35,7% | 31,3% | 32,9% | 43,9% | 33,9% | 37,4% |
| Dressing differently | 16,4% | 12,7% | 14,0% | 32,0% | 15,8% | 21,5% |
| Investing or managing budget | 22,1% | 19,1% | 20,2% | 20,4% | 13,4% | 15,8% |
| Starting a new hobby | 12,2% | 9,9% | 10,7% | 21,7% | 10,6% | 14,5% |
| Traveling | 13,7% | 10,5% | 11,6% | 24,8% | 14,6% | 18,2% |
| Gaming | 31,5% | 22,9% | 26,0% | 10,4% | 7,5% | 8,5% |
| Prioritizing mental health | 11,1% | 11,2% | 11,1% | 26,4% | 17,4% | 20,5% |
| Seeking psychological help | 14,5% | 12,0% | 12,9% | 17,3% | 11,0% | 13,2% |
| Other | 1,3% | 0,4% | 0,7% | 0,4% | 0,8% | 0,7% |
| None | 13,3% | 29,7% | 23,7% | 18,9% | 39,9% | 32,5% |

Table 14: Influence of social media personalities on behavior of Belgians who follow influencers, content creators and/or celebrities: gender versus age (N = 4371).

Language appears to have a strong impact too. Among French-speaking individuals, 80,1% report being influenced by social media personalities across various categories, regardless of age. In contrast, this percentage is only 65,0% among Dutch-speaking individuals.

| | Dutch | | | French | | |
|------------------------------|-------|-------|-------|--------|-------|-------|
| | 16-24 | 25-39 | Total | 16-24 | 25-39 | Total |
| Exercising more | 38,6% | 22,4% | 28,4% | 44,7% | 31,6% | 36,2% |
| Eating healthier | 36,5% | 27,8% | 31,0% | 43,6% | 38,0% | 40,0% |
| Dressing differently | 20,7% | 9,5% | 13,7% | 28,5% | 19,6% | 22,7% |
| Investing or managing budget | 17,7% | 13,5% | 15,1% | 25,0% | 19,1% | 21,1% |
| Starting a new hobby | 18,2% | 9,8% | 12,9% | 15,8% | 11,0% | 12,7% |
| Traveling | 16,6% | 9,0% | 11,9% | 22,0% | 16,7% | 18,5% |

| | Dutch | | | French | | |
|----------------------------|-------|-------|-------|--------|-------|-------|
| | 16-24 | 25-39 | Total | 16-24 | 25-39 | Total |
| Gaming | 18,0% | 11,3% | 13,8% | 25,2% | 19,7% | 21,6% |
| Prioritizing mental health | 19,9% | 14,1% | 16,3% | 17,9% | 14,6% | 15,8% |
| Seeking psychological help | 15,2% | 10,1% | 12,0% | 16,8% | 13,1% | 14,4% |
| Other | 0,9% | 0,8% | 0,8% | 0,8% | 0,4% | 0,6% |
| None | 21,6% | 42,9% | 35,0% | 9,2% | 25,7% | 19,9% |

Table 15: Influence of social media personalities on behavior of Belgians: language versus age (N = 4418).

PERSPECTIVES TOWARD USE OF AI BY INFLUENCERS

The percentage of people who have encountered AI-generated posts from influencers, content creators, or celebrities is nearly the same as those who have not (36,4% vs. 36,1%). Interestingly, 27,5% are unsure whether they have seen such posts. Once again, more men reported encountering AI-generated content than women (45,3% vs. 27,6%).

| | Man | | | Women | | |
|------------|-------|-------|-------|-------|-------|-------|
| | 16-24 | 25-39 | Total | 16-24 | 25-39 | Total |
| Yes | 58,0% | 38,0% | 45,3% | 38,0% | 22,1% | 27,6% |
| No | 25,3% | 40,0% | 34,7% | 32,4% | 40,3% | 37,6% |
| Don't know | 16,7% | 22,0% | 20,0% | 29,6% | 37,6% | 34,8% |

Table 16: % of participants who have encountered AI posts by influencers, content creators, or celebrities – according to gender and age (N = 4371).

There also appears to be a difference between Dutch and French speakers. French-speaking individuals report having more exposure to AI-generated content from influencers compared to Dutch speakers (41,8% vs. 31,8%), with young French speakers (18-24) being the most likely to come across such content (54,4%).

| | Dutch | | | French | | |
|------------|-------|-------|-------|--------|-------|-------|
| | 16-24 | 25-39 | Total | 16-24 | 25-39 | Total |
| Yes | 43,0% | 25,2% | 31,8% | 54,4% | 35,0% | 41,8% |
| No | 30,4% | 38,4% | 35,4% | 26,8% | 42,3% | 36,9% |
| Don't know | 26,7% | 36,4% | 32,8% | 18,8% | 22,7% | 21,3% |

Table 17: % of participants who have encountered AI posts by influencers, content creators, or celebrities – according to language and age (N = 4418).

The most common way people recognized AI-generated content is through a caption explicitly stating it was AI (46,9%). Additionally, a significant portion of respondents identified AI content based on its visual characteristics (43,1%). AI labels also played an important role, with 38,7% of respondents noticing AI-generated posts this way. Fewer people determined it was AI based on the post's reactions (18,0%). No gender and age differences could be found, but language played a role in how people recognize AI-generated content. Compared to Dutch-speaking people, French-speaking individuals are more likely to recognize it based on a caption mentioning the use of AI (51,1% vs. 42,1%), while Dutch-speaking people, compared to French-speaking people, more often relied on the AI label sometimes added to these posts (42,9% vs. 34,9%).

65,4% find it important that influencers, content creators, and celebrities disclose when their posts are generated with AI. The difference is moderate between women (67,5%) and men (63,1%), as well as between younger (62,9%) and older individuals (66,8%).

| We asked participants in the focus groups what they thought of brands using AI:

"Ik vind AI leuk als het niet super serieus is. Bedrijven die het gebruiken voor hun reclame, vind ik niet professioneel." (16-18)

"Ik vind het niet zo professioneel als grote bedrijven AI gebruiken. Je ziet nog steeds fouten. Je moet niet echt moeite doen om die fouten eruit te halen. Het valt echt hard op." (16-18)

THE RISE OF VIRTUAL INFLUENCERS

47,2% of the participants know what virtual influencers are, an increase of 3,8% compared to last year, and 15,1% claim to follow at least one digital persona, with Instagram, TikTok, and YouTube being the most popular platforms. There are no significant age differences in awareness of virtual influencers. However, there are age differences in the tendency to follow virtual influencers: 18,6% of those aged 16-24 claim to follow virtual influencers on social media, compared to 13,1% among those aged 25-39. Men report being more familiar with virtual influencers than women (53,8% vs. 40,6%), and a higher percentage of men claim to follow virtual influencers compared to women (19,9% vs. 10,3%). French-speaking Belgians show greater familiarity with virtual influencers than Dutch-speaking Belgians (49,5% vs. 45,3%) and are more likely to follow them (19,8% vs. 11,1%).

Support for using virtual influencers in communication strategies is relatively low, with only 20,9% in favor of brands utilizing them. Younger audiences (16-24) are slightly more supportive (23,8% compared to older ones (19,3%). Support is higher among men (27,5%) and French-speaking Belgians (24,6%) compared to women (14,5%) and Dutch-speaking Belgians (17,8%). At the same time, there is a strong demand for transparency—74,2% emphasize the importance of a clear disclosure when an influencer is virtual. This is even more important to the older age group (75,7% vs. 71,6%) and women (78,3% vs. 70,0%). There are no significant differences on this matter according to language.

While younger age groups are slightly more likely to follow virtual influencers, their comments reveal mixed feelings. Several respondents mentioned a sense of unease and distrust when engaging with digital personas:

« Ça fait vraiment peur maintenant. » (16-18)

"Dat voelt zeer corporate aan. Daar zit een heel bedrijf achter. Daar wordt over gebrainstormd: voor welke doelgroep? Wat laten we die AI zeggen? Je kan proberen dat zoveel mogelijk op een mens te laten lijken, maar je hebt zo door dat het geen mens is. Ik vind het heel creepy." (19-24)

Among the brands we spoke with, virtual influencers are met with hesitation. For many, the value of influencer marketing lies precisely in the human, relatable connection — something they feel digital personas cannot replicate:

"Ik ben daar een beetje bang van. Ik vind het een eng idee. Ik denk ook dat dat in the long run niet echt iets gaat worden. Waarom volgen mensen influencers? Dat is toch om echt die inspiratie te krijgen en een soort community en een band. Het lijkt me heel raar om virtuele influencers te hebben of in te schakelen." (Pauline Grossen, Just Russel)

"Onze influencers moeten echte mensen blijven, ook geen foto's met AI enzo." (Alice De Ley, Etam)

Podcasts



KEY INSIGHTS

- Podcast listening frequency is on the rise, with 20,9% listening on a daily basis and 40,8% on a weekly basis. Men and French-speaking people tend to be heavier podcast listeners.
- While Spotify is the dominant platform for podcast listening, YouTube is especially valued for the combination of audio and video among young Belgians (16-24).
- 78,9% of podcast listeners encounters brands while listening, presenting an increase of +4,7% compared to last year.
- Interviews with brands highlight both the storytelling potential and the strategic challenges that come with the format.

SPOTIFY DOMINATES IN PODCAST LAND

57,7% (+2,5%) of the Belgians aged 16 to 39 regularly listens to podcasts, of which 20,9% daily, and 40,8% weekly. Men and French-speaking people tend to be heavier podcast listeners.

| | 16-24 | | 25-39 | | Total | |
|--------|-------|---------|-------|---------|-------|---------|
| | Daily | Monthly | Daily | Monthly | Daily | Monthly |
| Men | 22,4% | 59,4% | 27,0% | 63,7% | 25,4% | 62,2% |
| Women | 16,1% | 56,3% | 16,9% | 51,4% | 16,6% | 53,1% |
| Dutch | 15,2% | 55,0% | 19,3% | 55,5% | 17,8% | 55,3% |
| French | 23,6% | 61,5% | 25,1% | 60,0% | 24,6% | 60,5% |
| Total | 19,0% | 57,9% | 22,0% | 57,6% | 20,9% | 57,7% |

Table 18: Belgian podcast listeners (N = 4715).

Spotify is the dominant platform for podcast listening, used by 60,4% of regular podcast listeners (at least monthly). Looking at specific features, 70,1% of podcast listeners use playlists daily, while 27,5% listen to podcast shows daily. However, a generational difference emerges in podcast show consumption, with 30,3% of older listeners tuning in on Spotify, compared to only 23,4% of younger listeners.

| | 16-24 | 25-39 | Total |
|----------------|-------|-------|-------|
| Spotify | 65,0% | 57,9% | 60,4% |
| YouTube | 47,1% | 50,6% | 49,4% |
| Apple podcasts | 6,0% | 7,3% | 6,9% |
| Podimo | 7,2% | 5,5% | 6,1% |
| Google | 2,8% | 5,5% | 4,6% |
| Stitcher | 5,6% | 3,4% | 4,2% |
| Other | 3,9% | 5,0% | 4,6% |

Table 19: Preferred platforms among regular podcast listeners (N = 2720).

Spotify is the dominant platform for podcast listening, used by 60,4% of regular podcast listeners (at least monthly). Looking at specific features, 70,1% of podcast listeners use playlists daily, while 27,5% listen to podcast shows daily. However, a generational difference emerges in podcast show consumption, with 30,3% of older listeners tuning in on Spotify, compared to only 23,4% of younger listeners.

Although Spotify is the dominant platform for listening to podcasts, some participants prefer YouTube as it allows them to watch podcast videos and see facial expressions.

"YouTube gebruik ik ook soms om podcasts te beluisteren, zodat je kan kijken terwijl je eet." (19-24)

« Je le fais sur YouTube parce que j'ai besoin de voir les personnes et leurs réactions. Ça me dérange de ne pas pouvoir voir comment ils se sentent. » (16-18)

« Je n'écoute pas trop de podcasts, mais si j'en écoute un, c'est toujours sur YouTube. Moi, j'aime bien voir leur tête ou leur réaction quand ils disent quelque chose. Parce qu'ils sont en train de parler sur Spotify, mais je ne les vois pas. Je préfère quand je les vois. » (16-18)

THE POWER OF PODCASTS FOR BRANDS

78,9% (+4,7%) of Belgian podcast listeners aged 16 to 39 regularly encounter brands, with 44,2% hearing them often or daily.

When it comes to brand involvement in podcasts, opinions are somewhat divided. 28,4% believe it is a good idea for brands to advertise in existing podcasts (16-24: 29,2%; 25-39: 28,0%), while 36,6% support brands creating their own podcasts (16-24: 38,4%; 25-39: 35,6%). Meanwhile, 27,2% dislike the idea of brands using podcasts altogether (16-24: 24,7%; 25-39: 28,5%) and 11,9 % remain unsure.

Although podcast listening has increased compared to last year, its impact on brands appears to have slightly diminished. Over the past three months, 32,5% (-2,2%) of listeners looked up information about a brand mentioned in a podcast, 38,7 (-2,9%) discovered a brand through a podcast, and 25,4% (-3,6%) made a purchase because of a podcast.

The young people we interviewed confirmed that brand presence in podcasts is common, often through integrated forms of sponsorship.

"Zelfs in podcasts wordt er aan sponsoring gedaan. Er is wel altijd iets van reclame. Maar dat vind ik nog wel oké." (19-24)

"In de podcasts die ik luister is reclame altijd geïntegreerd. Ik vind het wel goed als de sponsor veel aan bod komt, maar dan weet ik nooit of het reclame is of niet." (19-24)

"Soms worden zij door random dingen gesponsord en dan denk ik: wat is dit?" (19-24)

BRANDS NAVIGATING THE PODCAST LANDSCAPE

While young listeners clearly recognize and accept the presence of brands in podcasts, the decision for brands to invest in their own podcast is anything but straightforward. Experts highlight both the storytelling potential and the strategic challenges that come with the format. As such, the uncertainty around long-term return on investment and the need for sustained promotion can create hesitation.

Some of the brands we interviewed remain in an exploratory phase, observing how the medium evolves before fully committing. Others are cautiously experimenting, aware that audio-only content may no longer be sufficient in today's visually driven media landscape. From a business perspective, launching a podcast can be demanding: without an existing audience or clearly defined added value, it's hard to justify the investment. This underlines the importance of starting from meaningful content, rather than from the mere desire to "have a podcast".

“Ik denk dat een podcast een goed format kan zijn om dieper in te gaan op de storytelling van je merk. Waar staan we voor? Wat bieden we aan? Het moet relevante content zijn, maar altijd dicht bij je merk blijven. [...] We evalueren altijd of het de juiste keuze is. Een podcast lanceren gaat verder dan de productiekosten: het vergt ook een investering om het publiek te bereiken en de podcast onder de aandacht te brengen. Het vraagt om veel middelen, terwijl het rendement pas later zichtbaar is. Daarom kijken we nu vooral afwachtend naar hoe het podcastlandschap zich verder ontwikkelt.”
(Tjorven Crevits, Colruyt Group)

“Daar merk je wel dat als je een podcast doet, en die is enkel audio, dat het eigenlijk te weinig is. Social media platforms zijn zo gemaakt rond iets visueels - foto of video - dat enkel audio te weinig is om dat als promotioneel item in te zetten. Er zullen in de toekomst zeker nog podcasts volgen. Het is iets dat we interessant vinden, en waar we op willen inzetten. We zijn op verschillende manieren aan het zoeken hoe we het kunnen doen, op een leuke en juiste manier.” (Arnaud Neyt, Studio 100)

“Als je - zoals wij - dan van nul zou moeten gaan starten, moet je ofwel gaan partneren met iemand ofwel moet je zo'n goed concept hebben dat je echt een uniek verhaal te vertellen hebt. We hebben vandaag nog niet het gevoel dat we dat unieke concept gevonden hebben dat we daarvoor een podcast moeten gaan maken.” (Karen Vanstaen, Standaard Boekhandel)

“Een podcast maken is niet moeilijk. Je kunt over alles een podcast en content maken. Een podcast maken waar mensen naar willen luisteren, dat is moeilijk.” (Pieter Hens, Toerisme Oostende)

When it comes to advertising in existing podcasts, professionals are pragmatic. Podcasts are increasingly viewed through the lens of influencer marketing: personal, niche, and context-dependent. However, this also means that reach is inherently limited. The competition for listener attention is fierce, and podcasts must battle with countless other formats during short windows of daily listening time.

“Het bereik dat je via een podcast kunt behalen, is eigenlijk vrij beperkt. Een podcast is vergelijkbaar met een influencer, waarmee je een specifieke groep of community bereikt. In plaats van een persoon te volgen, draait het om een specifiek onderwerp. Hoewel podcasts die miljoenen mensen in België bereiken (nog) niet bestaan, ligt het bereik van podcasts meestal tussen de 50.000 en 150.000 luisteraars. De conclusie is vaak dat andere kanalen dezelfde doelgroep bereiken, dezelfde doelstellingen kunnen behalen en vergelijkbare content bieden, maar tegen lagere kosten en met minstens dezelfde effectiviteit.”
(Tjorven Crevits, Colruyt Group)

“Iedereen zit dagelijks maar een halfuur of een uur in de auto. Als je zegt: oké, dat is het publiek waar ik op mik, is het dat halfuur dat je in concurrentie treedt met alle nieuwspodcasts, alle entertainmentpodcasts, alle andere podcasts.” (Karen Vanstaen, Standaard Boekhandel)

“De realiteit is dat podcast een niche is. Als je buiten de top 10 van podcasts gaat, ga je nooit megaveel bereik creëren.” (Jaan Dekempeneer, Wondr)

Despite these limitations, experts do not dismiss the format. On the contrary, there is strong belief in its potential—if there is a good match between brand and content. Still, for most brands, podcasts remain an opportunistic rather than strategic choice.

“Een goede match tussen merk en podcast is heel belangrijk, vind ik zelf. Als consument zou ik dan denken: ah ja, het klopt dat er dan advertising is. Tegenwoordig is er overal advertising. Het zou raar zijn om er niet aan mee te doen, maar er moet zeker en vast een goede link zijn.” (Alice De Ley, Etam)

“Daar zitten de voelsprietten uit. Als men mij kan overtuigen en aantonen dat dat goed werkt, gaan wij verder daarin proberen, maar ik ga daar geen grote budgetten aan uitgeven. Ik ga er grote budgetten aan uitgeven als ik zie dat er resultaat daaruit komt.” (Fabien Sobiecki, Famiflora)

“Wij rekenen dat ook een beetje onder influencermarketing. Het is een manier om mensen te bereiken op een authentieke manier via mensen die invloed hebben. [...] Een podcast kan daar een interessant medium zijn.” (Pauline Grossen, Just Russel)

“We briefen onze mediapartners ieder jaar over waar we naartoe willen en welke barrières we willen wegwerken. Zij bezorgen ons op hun beurt dan gepaste voorstellen die inspelen op onze noden. Dat kan gaan over podcasts, non-spotintegraties, ... Als het past binnen de strategie doen we podcasts. Daarom komen er dit jaar ook enkele leuke samenwerkingen aan.” (Julie Longerstay, Lidl)

HOW PODCASTS INSPIRE LIFESTYLE CHANGES

Podcasts influence listeners in various ways, with health and lifestyle changes being the most common. Among podcast listeners, 31,4% reported that a podcast has encouraged them to eat healthier, while 27,4% were motivated to exercise more. Financial management also stood out, with 19,0% taking steps to invest or better manage their budget. Mental well-being was also another area of impact: seeking psychological help (16,4%) and prioritizing mental health (16,3%). Additionally, 15,0% of listeners were inspired to game, 11,9% started a new hobby, 11,5% changed their style, and 10,6% were motivated to travel.

| | 16-24 | 25-39 | Total |
|------------------------------|-------|-------|-------|
| Exercising more | 29,5% | 26,2% | 27,4% |
| Eating healthier | 30,1% | 32,1% | 31,4% |
| Investing or managing budget | 20,0% | 18,4% | 19,0% |
| Seeking psychological help | 17,1% | 16,0% | 16,4% |
| Prioritizing mental health | 18,1% | 15,2% | 16,3% |
| Gaming | 15,1% | 15,0% | 15,0% |
| Starting a new hobby | 11,8% | 12,0% | 11,9% |
| Dressing differently | 11,4% | 11,5% | 11,5% |
| Traveling | 12,0% | 9,9% | 10,6% |
| Other | 1,2% | 1,3% | 1,2% |

Table 20: Impact of podcasts on lifestyle choices (N = 2720).

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We hope this report continues to serve as a meaningful source of insight for both researchers and industry professionals navigating the ever-evolving social media landscape.

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