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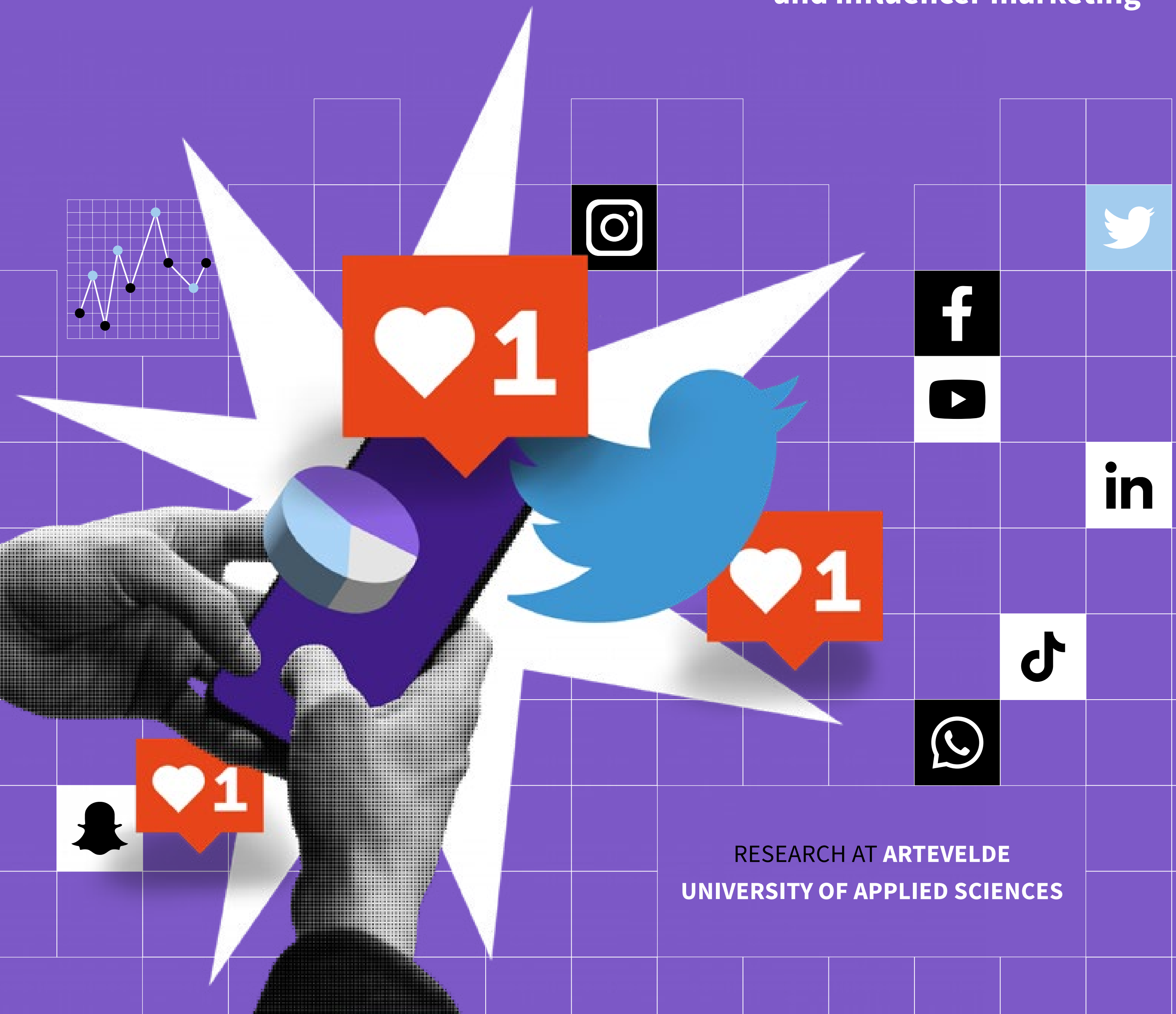
SMI Barometer 2023

Insights into how Belgians experience branding through social media and influencer marketing



RESEARCH AT ARTEVELDE UNIVERSITY OF APPLIED SCIENCES

Preface

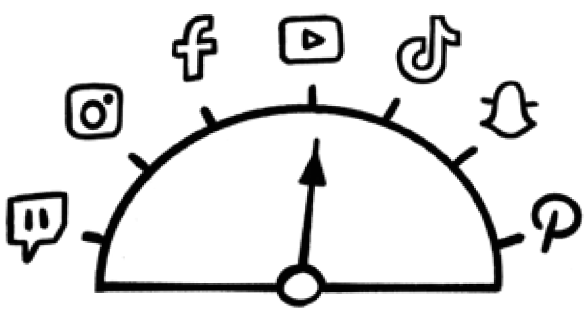
Dear reader,
We are excited to present the fourth edition of the social media & influencer marketing barometer (abbreviated as 'SMI-barometer' to improve readability of this report), which offers an overview of the current status of social media and influencer marketing among Belgian young adults (16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

GOAL OF THE RESEARCH

Since 2019, Artevelde University of Applied Sciences and Comeos, the Belgian federation for commerce and services, monitor trends on an annual basis. Trends on the adoption, use and evaluation of social media, influencer marketing and podcasts. This research is intended to serve as a benchmark for (retail)brands, offering the most up-to-date information on how Belgians (16 – 39 years) experience branding and influencer marketing via social media. To this end, we questioned a representative sample of Belgians between 16 and 39 years old. Furthermore, we gathered strategic insights into how Belgian retail brands approach their branding on social media through expert interviews. To conclude, in-depth interviews with youngsters (16 – 24 years) were conducted to gain in-depth insights into how this specific age group in particular experiences branding via social media and influencer marketing.

SURVEY SCOPE

This is the fourth edition of the SMI-barometer, and the third national edition. While the first edition focused only on Flemish youngsters (16 – 24 years), this is the third year in a row that the geographical scope of the research has been extended and the research has been executed among Belgian 16- to 24-year-olds. In this edition we extended the age range from 16-24 y.o. to 16-39 y.o. Belgians. As a result, we are able report long term trends for 16-24 y.o. and differences in social media adoption & attitudes between these youngsters and +25 year-old Belgians.



CHANGES IN SURVEY

Next to the broader sample definition (16-39 y.o. instead of 16-24 y.o.), different topics within the questionnaire were optimized. The survey was revised based on previous research, input from Comeos, i.e. representative of the Belgian commerce and services and Junior Malela, social media strategist. More specific, the following changes were made:

1. A number of relevant social media platforms (i.e. BeReal, Reddit and Telegram) and functionalities were added.
2. We gauged for actions taken to limit social media use.
3. We examined in depth what value consumers place on which social media platforms and for what type of activities they use them (i.e. uses and gratifications).
4. We examined brand-related uses of social media (gaining inspiration, making purchases, contacting customer service,...), both general and sector-related.
5. Since the term "influencer" seems subject to change in the vernacular, we explored it further. Thus, in addition to influencers, we included content creators and celebrities as possible actors influencing consumers online and delved deeper into what meanings are associated with each actor.
6. We deep dived into the inspirational value & (commercial) impact of influencers, content creators and celebrities.

We are confident that this edition will further inspire and engage you to use social media and influencer marketing in the most effective manner for your (retail)brand in Belgium.

Enjoy the read!

Marijke De Veirman, Ilse Bruwiere and Eveline Mollaert
Artevelde University of Applied Sciences

Kristof Delhez
Innovation Manager
Comeos

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

Social media and influencer marketing are crucial in this regard. They provide retailers with the opportunity to connect with people and involve them in their brand and products. But how effective are these marketing techniques really? And how can retailers ensure that their efforts on social media and through influencers actually yield results?

That's why we team up with Artevelde University of Applied Sciences every year to search for answers. We are pleased to share the results of this study with you in this report. They undoubtedly help you optimize your marketing strategy and reach consumers in a relevant and impactful way.

It's not just about stimulating consumption, but also about guiding consumers towards a healthy lifestyle. This is also an effect of influencer marketing, as our research shows. We are convinced that the results of this study will be of great value to our members and to the broader retail sector.

Alexia Bertrand
Secretary of State for
Consumer Protection

As Secretary of State for Consumer Protection, I focus daily on informing consumers, on strengthening their rights and on ensuring that those rights are enforced. In this regard, the policy level has been looking more closely at influencer marketing over the past few years. This topic confronts policymakers at various levels with new challenges. After all, “traditional” legislation does not always take into account the explosive growth of social media and the new phenomena associated with it.

The figures in the SMI report speak for themselves: brands and companies are well aware of the high impact and potential success of influencer marketing. However, that does not necessarily mean that the commercial aspect of posts by influencers and content creators is always obvious to consumers. How can influencers make this commercial aspect clear to their followers? What hashtag should they ideally use? With those questions in mind, I proactively work to address legislative gaps or create guidelines for both the sector and consumers. In doing so, together with my colleagues, I strive to maintain a balance between informing consumers on the one hand and leaving space for creativity for influencers, content creators and brands on the other. For example, in April 2022, guidelines were published that give influencers a choice of specific terms to mention on commercial posts, videos or stories: ‘#advertising’, ‘#reclame’, ‘#advertentie or ‘#publiciteit. In certain cases ‘#sponsored’ can also be used.

My main objective in consumer policy is for every consumer to become a conscious consumer: BE.COCO (« Wees een BEwuste COnsument - Be a COnscious COnsumer - Soyez un COnsommateur COnscient »). The conscious consumer makes informed and responsible decisions when buying services or products. This implies an obligation for companies to make the necessary information available and an obligation for consumers to take the necessary steps to take this information into account.

Rapid changes in consumer demands, technological advances, the shift to online purchasing and the increasing interaction with influencers and their followers will continuously change the overall state of the social media landscape. In the process, consumer rights must always evolve with it. Influencers, content creators and government are heading into challenging and exciting times.

My gratitude and congratulations go to Artevelde University of Applied Sciences and Comeos for identifying the trends annually.

Junior Malela
Social media strategist

Are you looking to take your social media and influencer marketing strategies to the next level? Then the fourth edition of the Social Media & Influencer Marketing Barometer, or SMI-barometer, is a must-read for you. This report is not just another collection of data and statistics; it offers the keys to a strategic approach to optimize your audiences and increase your reach amongst young people in Belgium via social media and influencer marketing.

The report provides a detailed definition of 'impact' and 'social media,' along with an in-depth analysis of twenty-two social media platforms, both new and old. This means that you will have a comprehensive understanding of the Belgian market and how to tailor your marketing strategies to better reach your target audience.

But that's not all. The report also deep dives into the impact of influencer marketing and how this strategy is perceived among Belgians. This will enable you to identify the right influencers and optimize your partnership strategies, so you can engage with your target audience in a more authentic and effective way.

The SMI-barometer is based on three studies: an online survey amongst Belgians between the ages of 16 and 39, qualitative research among Belgian youngsters, and in-depth interviews with Belgian retail brands. The combination of these studies provides a strategic approach to social media and influencer marketing in Belgium.

Furthermore, the report discusses the evolution of trends in Belgium over the past few years, which will give you a strategic edge in the marketplace.

Read the report now!

Junior Malela

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10 Key insights

1 | Instagram is the most frequently used social media channel among Belgians up to 39.
Belgians are frequent users of social media and messaging services in their everyday lives. The five most popular social media platforms among Belgians (16 – 39 years) are Instagram (70%), Facebook (69,2%), WhatsApp (66,1%), Messenger (65%) and YouTube (60,8%). YouTube is the most widespread social media platform, 93,2% of the Belgians (16-39 years) use it at least monthly.

2 | Instagram is the most used social media platform among youngsters, Facebook still rules among +25 year-olds.
The top 3 most popular social media differ among youngsters and +25 year-olds. Among youngsters, Instagram (86,6%), Snapchat (74,2%) and TikTok (69,1%) are the most popular platforms based on daily use. Among +25 year-olds, the top 3 consists of Facebook (77,2%), WhatsApp (71,6%) and Messenger (65,4%).

3 | TikTok has become a mainstream social media platform among youth.
After a steep increase in 2021, TikTok's growth (+6,4% compared to last year) is now more steady and the platform has established itself as a mainstream platform among young people with 69,1% using it daily (32,2% daily use among +25 year-olds). There are no differences in TikTok use between males and females or Dutch-and French-speaking Belgians, but the use of the app does decline with age. TikTok's more widespread adoption among a large and engaged user base is also being noticed by retail brands. As a result, TikTok is increasingly being recognized as a cost-effective platform with creative opportunities and ad formats to reach their target audience in a variety of ways. TikTok mainly has an entertaining value, which brands are trying to capitalize upon in their content strategy as well. Like TikTok 2 years ago, BeReal is gaining traction among youngsters (in particular Flemish youngsters).

4 | More than half of the Belgians up to 39 has ever undertaken actions to tame their social media use.
Belgians are frequent users of social media. However, many people are concerned about their social media use. Among 16-24 year-olds, 64,9% has ever undertaken actions to limit their social media use, among +25 year-olds, this is 54,9%.

5 | Staying in touch with friends and family remains a prime use of social media.
The main reasons why Belgians use social media are staying informed about activities and interacting with friends and family, relaxing and passing time, gaining inspiration and to learn something. The Meta-platforms Facebook and Instagram are best at fulfilling different roles. Youngsters (16-24 y.o.) use a broader range of channels to interact with friends and family compared to +25-year-olds who mainly use Messenger and WhatsApp. Youngsters use Facebook also in a more functional way, while +25-year-olds still actively post on Facebook. Niche channels such as Twitter, Pinterest, Discord, LinkedIn and Twitch are often used for a specific purpose (e.g. career, gaming, inspiration, news updates).

6 | Social media are crucial brand touchpoints.
Social media are an important platform to get to know brands or products and find information about brands. The most often used platforms where Belgi-

ans get to know brands or products and find information are Instagram, TikTok, YouTube and Facebook. Social shopping however is still in its infancy in Belgium, while clicking through to a brand's website or webshop is more commonplace. The retail brands we spoke with acknowledge social shopping is a trend to take into consideration, however, the technical possibilities to fully incorporate social shopping are limited to date.

7 | Influencer marketing remains effective.
While the percentage of young people following influencers seemed to have dropped (84,1% vs. 86,6% last year), we got a different picture when we calculated the percentage of youngsters following influencers, content creators or celebrities, which is 91,9%. Among 25+ year-olds, 75,8% follows influencers, content creators and/ or famous persons on social media (59% follows influencers). Of the people who follow influencers, content creators or famous persons (75,8%), 28,3% indicated that they have bought a product or service, 33,2% indicated that they started following a brand and 45,1% indicated they looked up more information about a brand, due to an influencer in the past three months. The impact of influencer marketing is higher among French-speaking compared to Dutch-speaking Belgians. Among the older age group only, influencer marketing has more impact on males compared to females (no significant differences within the younger age group). Thus, collaboration with influencers still pays off for brands. However, their impact among youngsters seems to have slightly decreased compared to last year.

8 | Content creators and influencers are perceived differently, nonetheless both have the ability to influence the opinions, behaviors, and purchasing decisions of their followers.
While it is sometimes suggested that content creator is a new name for influencer, we see that these are in fact perceived as two different personalities with their own typical characteristics. Hence, having many followers is to a lesser extent considered a typical trait for content creators, while creativity and posting fun, original content that inspires followers is paramount for the latter. Furthermore, influencers have more commercial connotations as they often partner with brands to promote products or services to their followers. However, both have the ability to influence the opinions, behaviors, and purchasing decisions of their followers. It appears that youngsters are less skeptical about content creators' authenticity and the motivations behind their endorsements, compared to influencers who are perceived to be more focused on making money.

9 | Influencers and content creators have an important impact on lifestyle, in particular when it comes to health-related behavior.
Influencers not only have an important commercial impact, they also impact our lives in a broader sense, in particular when it comes to health-related behavior. As such, 36,7% of youth who follows influencers, claims to exercise more due to an influencer, content creator or celebrity (+11,9% compared to last year) and 28,3% (+4,7% compared to last year) started to eat more healthy. Among +25 year-olds, 23,9% has been motivated to exercise more or eat more healthy by an influencer, content creator or celebrity.

10 | Podcasts are a promising platform for brands.
53.5% of the Belgians up to 39, listens to podcasts (16-24: 51,3% (-4,2%); 25-39: 54,8%). Podcasts are gradually being used as a branding strategy, as only 25,2% of the people who regularly listen to podcasts rarely or never gets in touch with brands through podcasts. Also, branding through podcasts appears effective in terms of conversion, as 32,4% of the people who listen to podcasts looked for more information about a brand due to a podcast and 26,6% admits to have bought a product or service due to a podcast in the past three months. In particular cooperating with podcasters as content creators may be a promising strategy for brands.

Methodology

Research question: context & terminology

What can you expect from the fourth edition of the Social Media & Influencer marketing Barometer, also known as the SMI-barometer? In this research report, we focus on the research question: 'How can Belgian (retail)brands increase their impact on Belgians between the ages of 16 and 39 via social media and influencer marketing?'

DEFINITION OF THE CONCEPT OF 'IMPACT'

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

DEFINITION OF THE CONCEPT OF 'SOCIAL MEDIA'

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

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

** New compared to SMI-barometer 2022*

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

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

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

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

Outline of the studies

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

1. 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 2022 and February 2023.

In Flanders, the distribution of the survey was achieved through students, who distributed the survey to the target group, through the University's network and through an online panel provider. In Brussels and Wallonia, data were collected via an online panel provider. After data cleaning consisting of removing incomplete and incorrect data, n=5663 valid cases were identified.

2. QUALITATIVE RESEARCH AMONG BELGIAN YOUNGSTERS

In February - March 2021, we conducted n=34 individual online qualitative interviews with Dutch-speaking and French-speaking youngsters (16 – 24 years). These participants were recruited via the quantitative sample taking into account age, gender and region (provinces). The respondents were interviewed online (via WhatsApp) to gain insights regarding their individual use and experience of social media and podcasts, branding via these platforms and influencer marketing. All respondents used WhatsApp prior to the qualitative survey.

3. IN-DEPTH INTERVIEWS WITH BELGIAN RETAIL BRANDS

During the period October 2022 – February 2023 we also spoke to n=9 (digital) marketing managers of retail brands. These retail brands were Brico, Casa, Beliving (2), Nespresso, Standaard Boekhandel, Electrodepot, Weba and The Body Shop. The interviews were conducted via videocall.

The insights gained from these interviews will be indicated with this specific lay-out

Introductory remarks about the research

WEIGHTING

To assure a representative sample of the Belgian population (16 – 39 years), we applied weighting[1] to make our sample reflect the population, based on census data from Statbel. We weighted the findings on age group, gender and region.

COMPARATIVE ANALYSES

If meaningful, we reported differences across gender, age group and language group (Dutch- or French-speaking). Statistical analysis was carried out using IBM SPSS Statistics. Reported differences between groups are at least significant at the .05 level.

EVOLUTION 2021 – 2023

Moreover, we reported the evolution in Belgium between 2021 (n = 3263) and 2022 (n = 3291) and in Flanders since 2020 where meaningful.

Differences between percentages (for example when comparing this year's results with last year's) are expressed in percent points, which is the absolute difference between the two percentages. For example, supposing that the usage frequency of a social media platform increases from 20% to 30%, then that is an increase of 10 percent points. The same difference expressed as a relative percentage means an increase of 50% (to go from 20% to 30%, an increase of half the starting value is needed).

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

Online survey: sample

AGE

The target group of this survey is Belgians between the ages of 16 and 39. The mean age of the n = 5663 participants is 26,3 years (SD = 6,8). As previous research shows that social media use may significantly differ across age groups, we considered differences between youngsters (16 – 24 years, n = 2657) and adults (25 – 39 years, n = 3006). For some analyses, we had an in-depth look into youngsters (16 – 24 years) in particular, wherefore we created 3 age groups: 16-18 years (n = 730), 19-21 years (n = 1005) and 22-24 years (n = 922).

GENDER

57,2% females (n = 3241; $n_{16\text{-}24}$ = 1512, $n_{25\text{-}39}$ = 1729) and 41.7% males (n = 2364; $n_{16\text{-}24}$ = 1097, $n_{25\text{-}39}$ = 1267) participated in the online survey. 32 participants (0.6%) indicated to be genderqueer. 26 participants indicated 'other' or 'I' prefer not to share my gender' (0.5%).

GEOGRAPHIC DISTRIBUTION

53,9% of the sample was Dutch-speaking (n = 3055; $n_{16\text{-}24}$ = 1552, $n_{25\text{-}39}$ = 1503); and 46,1% French-speaking (n = 2608; $n_{16\text{-}24}$ = 1105, $n_{25\text{-}39}$ = 1503). Figure 1 shows the distribution of participants across the regions in Belgium. Table 1 provides more details about the regional and age distribution.

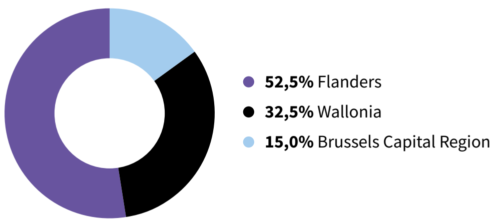

Figure 1 Distribution of participants across regions

	Flanders	Wallonia	Brussels CR	Total
16-24 years	1460	759	438	2657
25 – 39 years	1511	1084	411	3006
Total	**2971**	**1843**	**849**	**5663**

Table 1 Distribution of participants across regions and age group

EDUCATION AND EMPLOYMENT

At the time of the survey, 38,1% (n = 2160) of the participants were enrolled at least part-time in a school. Table 2 provides an overview of the which studies these participants were enrolled in at the time of survey.

General Secondary Education	18,3%
Technical Secondary Education	11,7%
Vocational Secondary Education	9%
Art Secondary Education	1,6%
Bachelor's studies	40,3%
Master's studies	14,2%
Doctoral Training	1,3%
Other	3,5%
Unemployed	2,8%
Other	4,6%

Table 2 Overview education participants (n = 2160)

51% worked at least part-time, either in paid employment (46,6%) or self-employed (24,4%). 9,6% was not enrolled in a school or in paid employment at the time of the survey. We asked these participants (n= 3503) to indicate their level of education, which is presented in table 3.

Primary Education	**2,5%**
Lower Secondary Education	**6,7%**
Upper Secondary Education	**35,7%**
Short-cycle tertiary education, Bachelor's level or equivalent	**32,9%**
Master's or doctoral level	**21,2%**
Unknown	**0,9%**

Table 3 Overview level of education participants (n = 3503)

Social media

Active social media use

KEY INSIGHTS:

- Belgians are frequent users of social media and messaging services in their everyday lives. The five most popular social media platforms among Belgians (16 – 39 years) are Instagram (70%), Facebook (69,2%), WhatsApp (66,1%), Messenger (65%) and YouTube (60,8%).
- YouTube is the most widespread social media platform, 93,2% of the Belgians (16-39 years) use it at least monthly. Next in line are WhatsApp, Facebook, Messenger and Instagram.
- The top 3 most popular social media differ among youngsters and +25 year-olds. Among youngsters, Instagram (86,6%), Snapchat (74,2%) and TikTok (69,1%) are the most popular platforms based on daily use. Among +25 year-olds, the top 3 consists of Facebook (77,2%), WhatsApp (71,6%) and Messenger (65,4%).
- Messaging services are widely adopted: 88,1% uses WhatsApp (66,1% on a daily basis) and 86,5% Messenger (65% on a daily basis). Messenger is more popular among 16-24 year-olds, while among +25 year-olds WhatsApp is more popular. Youngsters also use Instagram and Snapchat for messaging.
- TikTok remains popular and has become a mainstream social media platform among youngsters (69,1% daily use vs. 32,2% among +25-year-olds).
- Like TikTok 2 years ago, BeReal is gaining traction among youngsters (in particular Flemish youngsters).

INSTAGRAM IS THE MOST USED SOCIAL MEDIA PLATFORM AMONG YOUNGSTERS, FACEBOOK STILL RULES AMONG +25 YEAR-OLDS

Instagram is overall the most frequently used social media platform. Among the youngsters, it's even the most used social media platform (86,6% daily use). Next in line are Snapchat (74,2%) and TikTok (69,1%). As for those over 25, it's still Facebook that takes the lead, with 77,2% daily use. Facebook is followed by WhatsApp (71,6%) and Messenger (65,4%).

The following table provides an insight into the daily social media use among youngsters and +25 year-olds:

	Daily social media use		
	16 - 24 *(youngsters)*	**25 – 39** *(adults)*	**All ages**
Instagram	86,6%	60,9%	70,0%
Facebook	54,3%	77,2%	69,2%
WhatsApp	56,0%	71,6%	66,1%
Messenger	64,4%	65,4%	65,0%
YouTube	67,0%	57,4%	60,8%
TikTok	69,1%	32,2%	45,2%
Snapchat	74,2%	28,4%	44,5%
Twitter	25,7%	20,2%	22,1%
BeReal	35,6%	8,4%	17,9%
Discord	21,3%	15,5%	17,6%
Pinterest	18,3%	16,9%	17,4%
LinkedIn	11,2%	16,4%	14,6%
Twitch	13,0%	12,7%	12,8%
Telegram	10,1%	13,7%	12,4%
Reddit	9,5%	10,3%	10,0%

Table 4 Overview of daily social media use among Belgians (in %)

Looking into monthly social media use, it appears that YouTube is the most widespread social medium (93,2%), followed by WhatsApp (88,1%), Facebook (87,8%), Messenger (86,5%) and Instagram (84,2%). The wide adoption of several social media platforms among youngsters in particular is striking. Hence, 95,6% of the Belgian youngsters uses Instagram, 94,2% YouTube, 87,4% Snapchat, 86,6% WhatsApp, 83,6% Messenger, 80,8% Facebook and 79,5% TikTok. Among +25 year-olds the most commonly adopted channels are YouTube (92,6%), Facebook (91,6%), WhatsApp (89%), Messenger (88,1%) and Instagram (78%). Looking at the graph below, we can also clearly see that the use of Instagram, Snapchat and TikTok decreases as age increases. The opposite is true for Facebook and WhatsApp.

The low popularity of Facebook is also confirmed in our qualitative research:

"…JE N'Y VAIS QUASIMENT JAMAIS (REFERRING TO FACEBOOK)… JE N'AI JAMAIS RÉELLEMENT COMPRIS LEUR FONCTIONNEMENT ET CHERCHER LE CONNAÎTRE… ÇA VIENT SÛREMENT DU FAIT QUE QUAND J'AI COMMENCÉ À ALLER SUR LES RÉSEAUX C'ÉTAIT DÉJÀ UN PEU "LEUR FIN"OU DU MOINS MA GÉNÉRATION N'Y ALLAIT QUASIMENT PLUS."
WOMAN, 16 Y.O.

"JE TROUVE QUE C'EST PLUS DE L'ANCIENNE GÉNÉRATION. (REFERRING TO MESSENGER AND FACEBOOK"
WOMAN, 16 YEARS

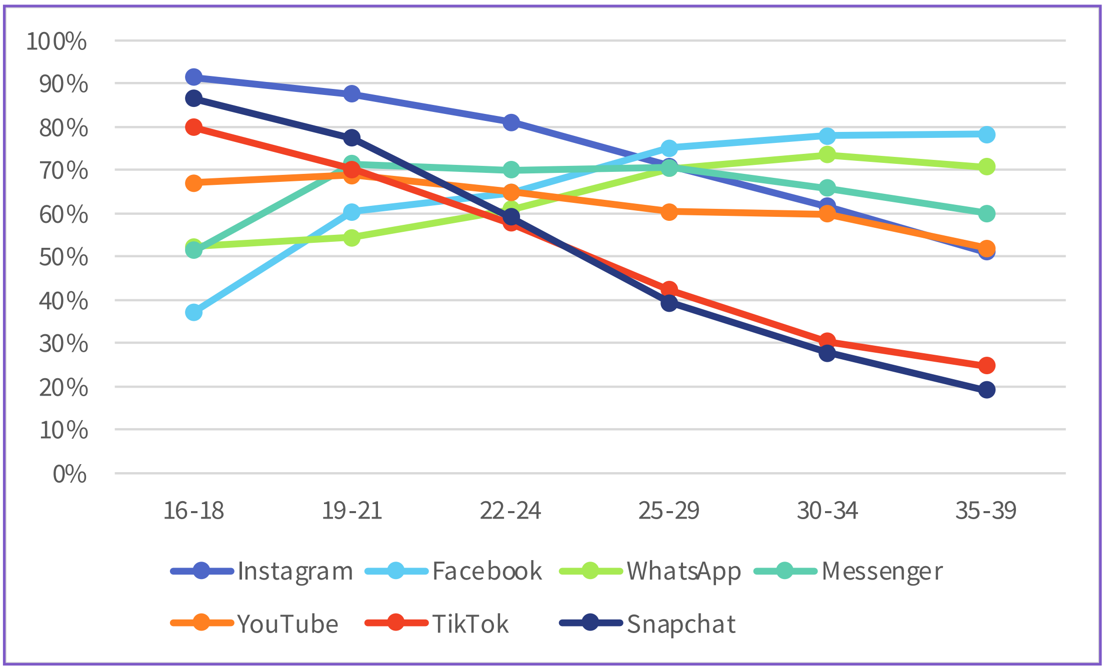

Figure 2 Daily social media use according to age group (in %)

For all social media apps there are differences in use between **males and females**, except for TikTok. The most popular social media platforms (Instagram, Facebook, WhatsApp and Messenger) except for YouTube are more frequently used by females, while almost all niche social media platforms are more frequently used by males, except for Pinterest. The following graph provides an insight into differences in daily use across males and females.

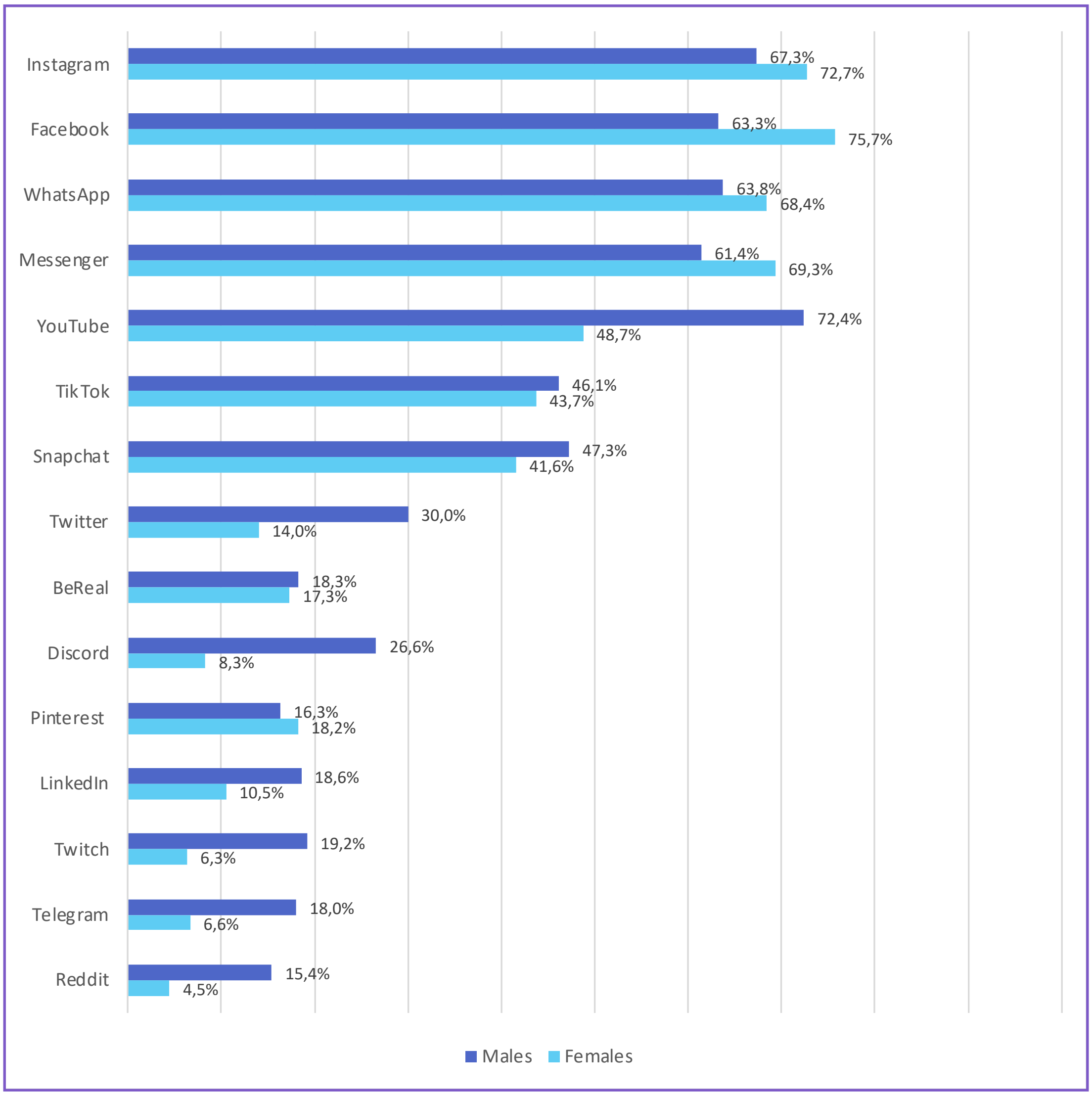

Figure 3 Daily social media use according to gender (in %)

When comparing the average use of the mainstream social media platforms among **Dutch- and French-speaking Belgians** (16 – 39 years), it appears that Instagram and WhatsApp are more frequently used among Dutch-speaking Belgians, while YouTube is more frequently used among French-speaking Belgians. However, when we take into account daily use only, the difference for Instagram is leveled out. There are no significant differences for Facebook, TikTok and Messenger. In the following graph we have plotted the daily use of social media by language group.

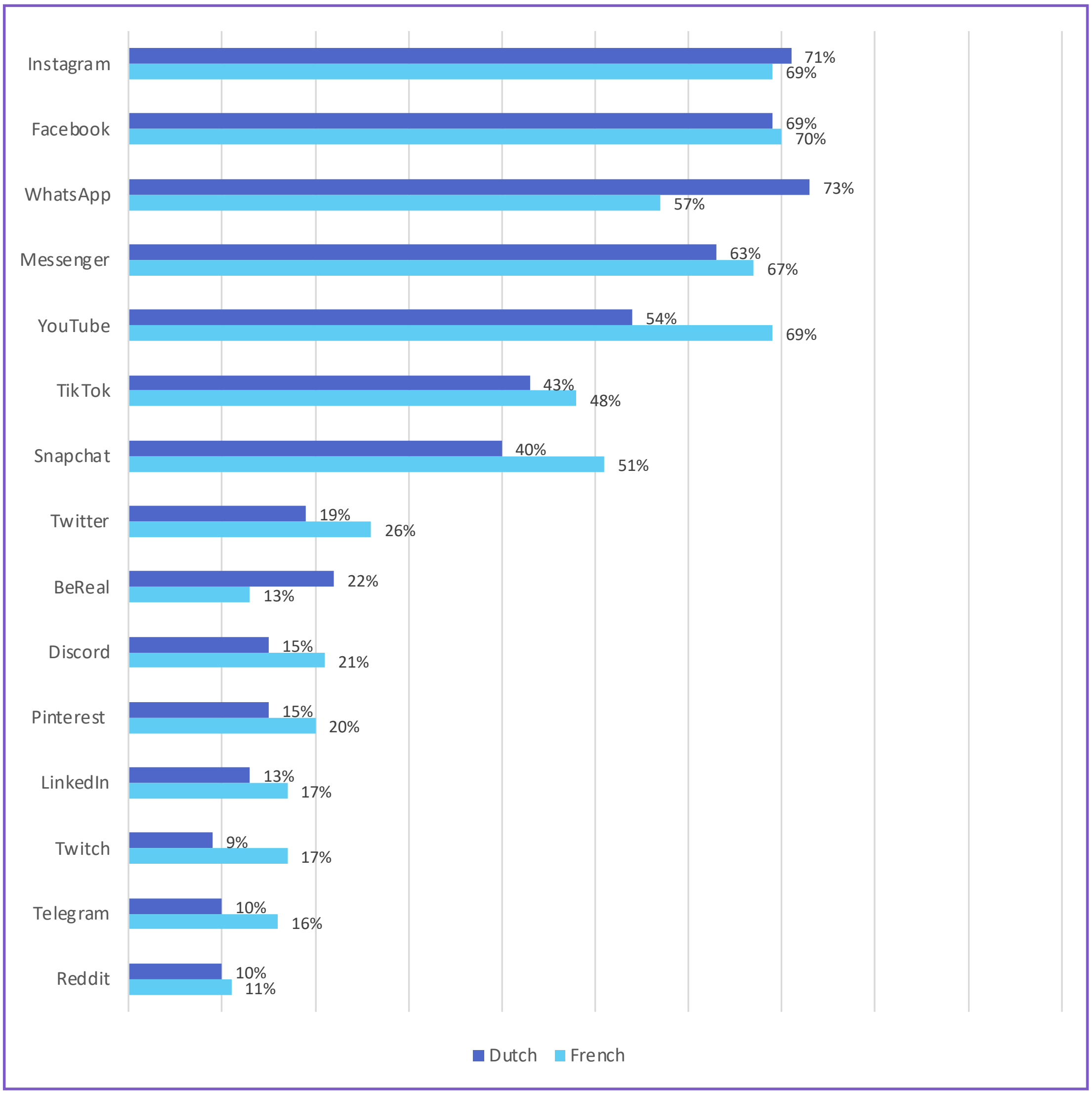

Figure 4 Daily social media use according to language group (in %)

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

Among users who use Instagram, Facebook and YouTube at least weekly, we gauged for their use of different functionalities these platforms offer. As such, it appears that several features of Instagram are used quite frequently among frequent users. 96% uses the feed (16-24: 97,2%; 25-39: 95,2%), 94% uses Instagram stories (16-24: 96,6%; 25-39: 92,2%) and 82,6% uses Instagram reels (16-24: 83,9%; 25-39: 81,7%). Furthermore, it appears that in particular youngsters use Instagram as a messaging service. 92,6% uses the messaging function and 62,4% even on a daily basis. Among +25 year-olds, these numbers are remarkably lower with 79,3% who uses the function and 39,2% on a daily basis. Instagram shop has only low adoption rates with 36,1% using it. Numbers are a bit higher for +25 year-olds (39,8%) compared to 16-24 year-olds (30,8%), which is probably due to the financial independence of +25 year-olds.

"INSTAGRAM PRINCIPALEMENT POUR PARLER AVEC MES AMIS, JE NE POSTE PAS DE PHOTOS // … J'UTILISE INSTA DEPUIS LONGTEMPS ET JE TROUVE QUE C'EST UN RÉSEAU SOCIAL COMPLET ET N'AI PAS BESOIN DE PLUS."
MAN, 17 Y.O.

"INSTAGRAM GEBRUIK IK VOORAL VOOR GEWOON OP DE HOOGTE TE BLIJVEN VAN HET NIEUWS EN HET IS NATUURLIJK SUPER LEUK OM TE ZIEN WAT JOUW VRIENDEN POSTEN."
WOMAN, 18 Y.O.

"… JE TROUVE QUE C'EST LE RÉSEAU (REFERRING TO INSTAGRAM) LE PLUS AGRÉABLE À UTILISER, AU NIVEAU VISUEL NOTAMMENT. MAIS AUSSI CAR J'AI TOUJOURS UTILISÉ INSTAGRAM ET MES AMIS AUSSI. CAR JE N'AI PAS D'AMIS SUR FACEBOOK ET QUE INSTAGRAM FAIT LA MÊME CHOSE."
MAN, 16 Y.O.

"CONTACT HOUDEN MET VRIENDEN. KIJKEN DAAR ZIJ MEE BEZIG ZIJN. OOK CHATTEN. IK BEKIJK HET MEER ALS ONTSPANNING MAAR IK KOM GEREGELD DINGEN TEGEN WAAR IK INSPIRATIE UIT KAN HALEN VOOR EEN PROJECT IN DE TOEKOMST."
WOMAN, 21 Y.O

"J'UTILISE RÉGULIÈREMENT INSTAGRAM ET SNAPCHAT. INSTAGRAM, C'EST SURTOUT POUR LES DISCUSSIONS AINSI QUE LES GROUPES D'AMIES."
WOMAN, 17 Y.O.

For Facebook, the two most important functionalities are the Facebook feed and Facebook groups. Of the frequent users, 93,6% uses the Facebook feed and 83,1% Facebook groups (16-24: 77,8%; 25-39: 85,4%). These Facebook functionalities appear to be more frequently used among +25 year-olds compared to youngsters, with 80,6% (16-24: 70,2%) using the feed and 50,1% (38,5%) using groups daily. Hence, Facebook is in general more popular among +25 year-olds and among those who use it at least weekly, it is also used more intensely among +25-year-olds. Facebook stories (64,4%), reels (56,2%), rooms (30,8%) and marketplace (63,3%) are less popular functionalities among frequent users. As for Facebook's two main functionalities, the qualitative research among 16-24 y.o. shows that Facebook groups often meet a more functional purpose (school, hobbies,...).

"ET FACEBOOK JE NE L'UTILISE QUE PARCE QU'ON A UN GROUPE POUR LES SCOUTS."
WOMEN, 16 Y.O.

"FACEBOOK GEBRUIK IK VOORAL VOOR HET BEKIJKEN VAN DE FEED EN MESSENGER VOOR CHAT MET SCHOOL OF ALS IK DINGEN VERKOOP VIA MARKETPLACE."
MAN, 18 Y.O.

On YouTube, most frequent users watch classic YouTube videos (94,7%) rather than shorts (60,2%).

TAMING SOCIAL MEDIA USE

Previous analysis showed that Belgians are frequent users of social media. At the same time, we find that a lot of Belgians, especially young people are concerned about their social media use. Among 16-24 year-olds, **64,9%** has ever undertaken actions to limit their social media use, among +25 year-olds, this is **54,9%**

“SINON J’AI L’APPLICATION TIKTOK QUE J’UTILISAIS AVANT MAIS MAINTENANT C’EST UNE APPLICATION QUI “ DÉCORE “MON FOND D’ÉCRAN. DISONS QUE J’AI EU UNE PHASE OÙ JE L’UTILISAIS BEAUCOUP QUE CE SOIT POUR FILMER OU JUSTE REGARDER. SUR CE J’AI DÉCIDÉ DE RÉDUIRE MA CONSOMMATION ET ÇA A FINI PAR ME FAIRE ARRÊTER COMPLÈTEMENT ET JE NE RESSENS PLUS L’ATTRACTION QUE J’AVAIS.”
WOMAN, 17 Y.O.

The following figure clarifies which actions are taken per age group:.

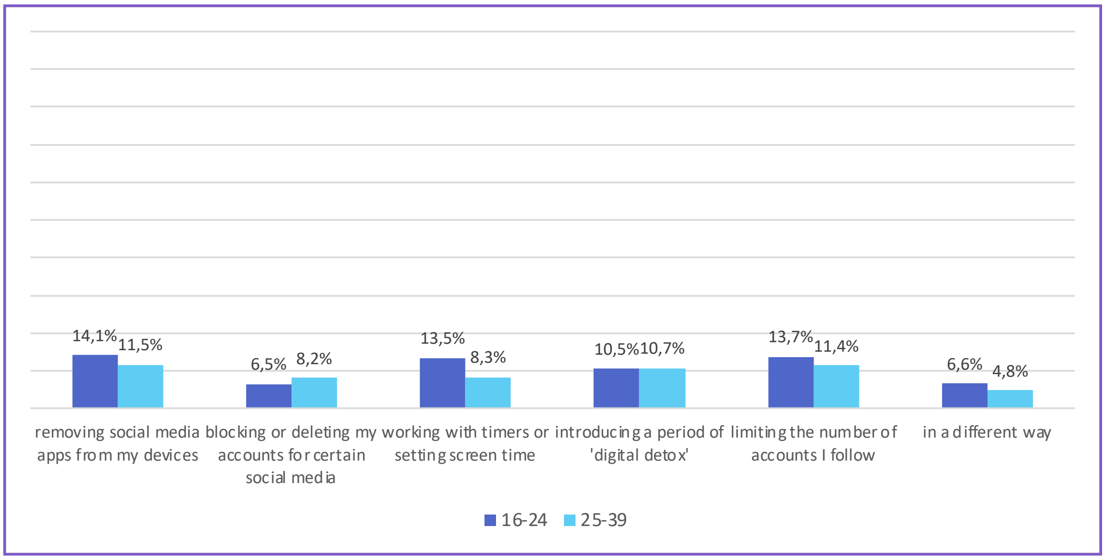

Figure 5 Actions taken to limit social media use according to age group (in %)

Focus on youth

INSTAGRAM, SNAPCHAT AND TIKTOK ARE THE MOST FREQUENTLY USED SOCIAL MEDIA PLATFORMS AMONG BELGIAN YOUNGSTERS (16 – 24 YEARS)

Figure 6 provides an overview of how often Belgian youngsters use social media and messaging services in their everyday lives (in %). By comparing daily and monthly use, we gain insights into which platforms are use most intensively and which platforms are used most frequently.

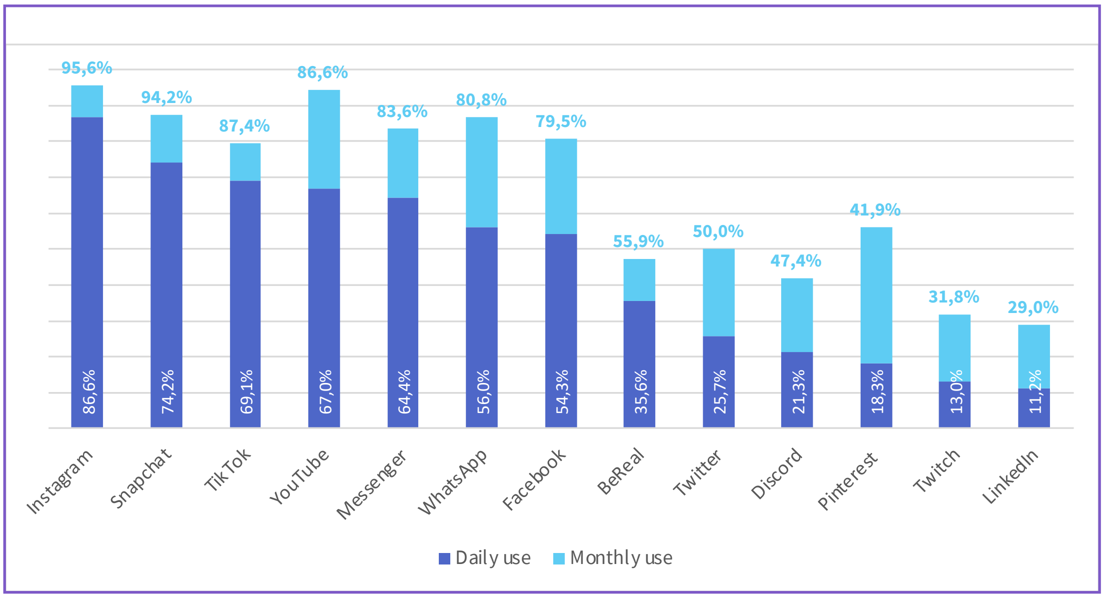

Figure 6 Comparison of daily and monthly social media use among Belgian youngsters (in %)

EVOLUTION OF SOCIAL MEDIA USE AMONG YOUNGSTERS: FACEBOOK'S DECLINE CONTINUES, AS DOES TIKTOK'S RISE, BUT LESS STEEPLY

Instagram remains the most popular social media platform among Belgian youngsters. 95.6% uses Instagram and 86.6% even on a daily basis. Last year, it appeared that the platform reached its peak, but in fact the use of Instagram has slightly increased this year (+3,8%). The daily use of Snapchat and TikTok also continued to grow. 74,2% of the Belgian youngsters uses Snapchat on a daily basis (+8,4%) and 69,1% uses TikTok daily (+6,4%). After a steep increase in 2021, TikTok's growth is now steadier and the platform has established itself as a mainstream platform among young people. For the second year in a row, the number of daily users of YouTube is slightly down (-2%). The decline of Facebook also continues (-4,4%), but less quickly than last year. A new platform in the top 10 among Belgian Youngsters is BeReal. About half of the Belgian 16- to 24-year-olds uses this new player in social media land and 35.6% of the Belgian youngsters even uses it on a daily basis.

Qualitative research learns that BeReal has the benefit of being perceived as an authentic app showing real life situations but is quite time consuming and not used by all peers. As a result, some youngsters indicate BeReal has already passed its momentum (to be confirmed in our next SMI survey).

"NU DAT HET SCHOOLJAAR OPNIEUW BEGONNEN IS, HEB IK DUS MINDER TIJD EN PLAATS IK NIET MEER ZOVEEL BEREAL'S."
MAN, 16 Y.O.

"JE ME SUIS UN PEU LASSÉ DE BEREAL MÊME SI LE CONCEPT EST PLUS SYMPA QUE SNAPCHAT."
WOMAN, 19 Y.O.

"IK HEB DAT VROEGER BIJNA ELKE DAG GEBRUIKT TOEN HET EEN 'HYPE' WAS, MET NAME MAART/APRIL/MEI 2022. NU NIET MEER WANT HET INTERESSEERT MIJ ECHT NIET, EN DE MENSEN DIE IK BELANGRIJK VIND POSTEN DAAR OOK NIET OP. DUS IK HEB DAAR NIETS MEER TE ZOEKEN. BEREAL HEB IK VERWIJDERD."
WOMAN, 20 Y.O.

"BEREAL JE CONNAIS BEAUCOUP D'AMIS À MOI QUI ONT ET ILS ME CONSEILLENT VRAIMENT D'INSTALLER. MAIS JE N'AIME PAS LE CONCEPT PARCE QUE JE N'AI PAS ENVIE QUE ÇA DEVIENNE UNE CORVÉE."
MAN, 16 Y.O.

The following figures show the evolution in % of daily users of the main social media platforms in Belgium (3-year evolution) and Flanders (4-year evolution).

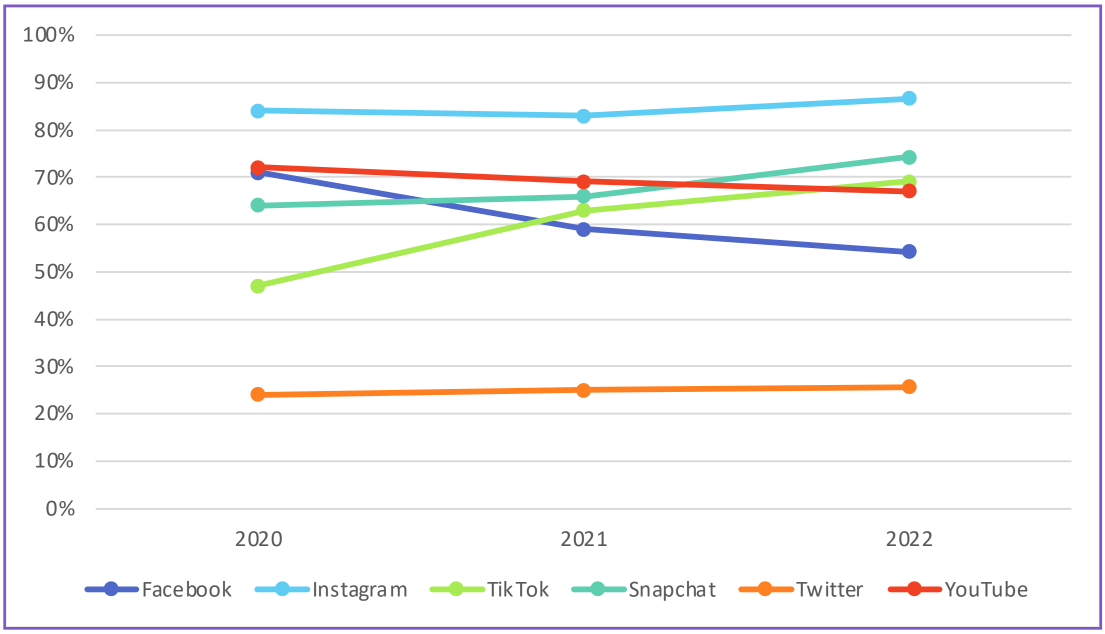

Figure 7 Evolution of social media use among Belgian youngsters (16 – 24 years; expressed in % of youngsters that uses the channel (almost)daily or more frequently)

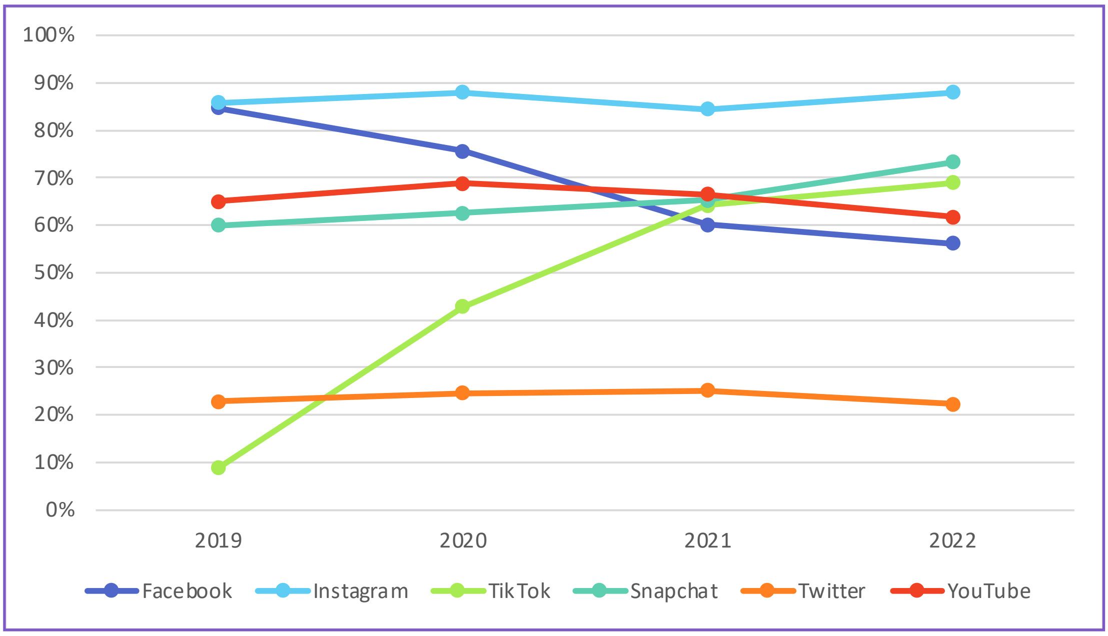

Figure 8 Evolution of social media use among Flemish youngsters (16 – 24 years; expressed in % of youngsters that uses the channel (almost)daily or more frequently)

Twitter has a user base but has not become a mainstream social media app yet. Our qualitative research also shows that youngsters are quite critical about Twitter.

"ET C'EST UN RÉSEAU OÙ IL Y A BCP DE VIOLENCE. C'EST UN RÉSEAU ASSEZ TOXIQUE. OÙ IL N'Y A PAS DE MODÉRATION."
MAN, 17 Y.O.

"J'AI ENTENDU QU'IL Y AVAIT BEAUCOUP DE HAINE SUR TWITTER ET ÇA NE M'INTÉRESSE PAS. JE N'EN AI AUCUNE IDÉE MAIS IL ME SEMBLE QUE POUR LE MOINDRE PETIT FAUX PAS TU TE FAIS JUGER SUR TWITTER."
WOMAN, 19 Y.O.

"IK HEB GEEN TWITTER OMWILLE VAN FIGUREN ZOALS DONALD TRUMP EN MATT WALSH. LIJKT MIJ EEN HEEL HAATDRAGENDE APP, ZEKER NU ELON MUSK ZIJN VISIE WILT DOORVOEREN."
MAN, 20 Y.O.

DIFFERENCES IN SOCIAL MEDIA USE AMONG MALE AND FEMALE YOUTH

The top 3 daily used social media channels among male youngsters are Instagram (85%), YouTube (79,3%) and Snapchat (74,1%). Among female youth, the top 3 consists of Instagram (89,2%), Snapchat (75,1%) and TikTok (72,8%). The graph below provides more details on differences daily social media use between both groups.

A few differences stand out in particular:

- Instagram, TikTok, Messenger, WhatsApp, Facebook and BeReal are more frequently used by females.
- YouTube and Twitter are on average more frequently used by males.
- Niche platforms such as Twitch and Discord clearly attract more males than females. Pinterest is the only niche platform that attracts more females.
- While Snapchat attracted more females up to last year, this year there are no longer differences in frequency of use among males and females.

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

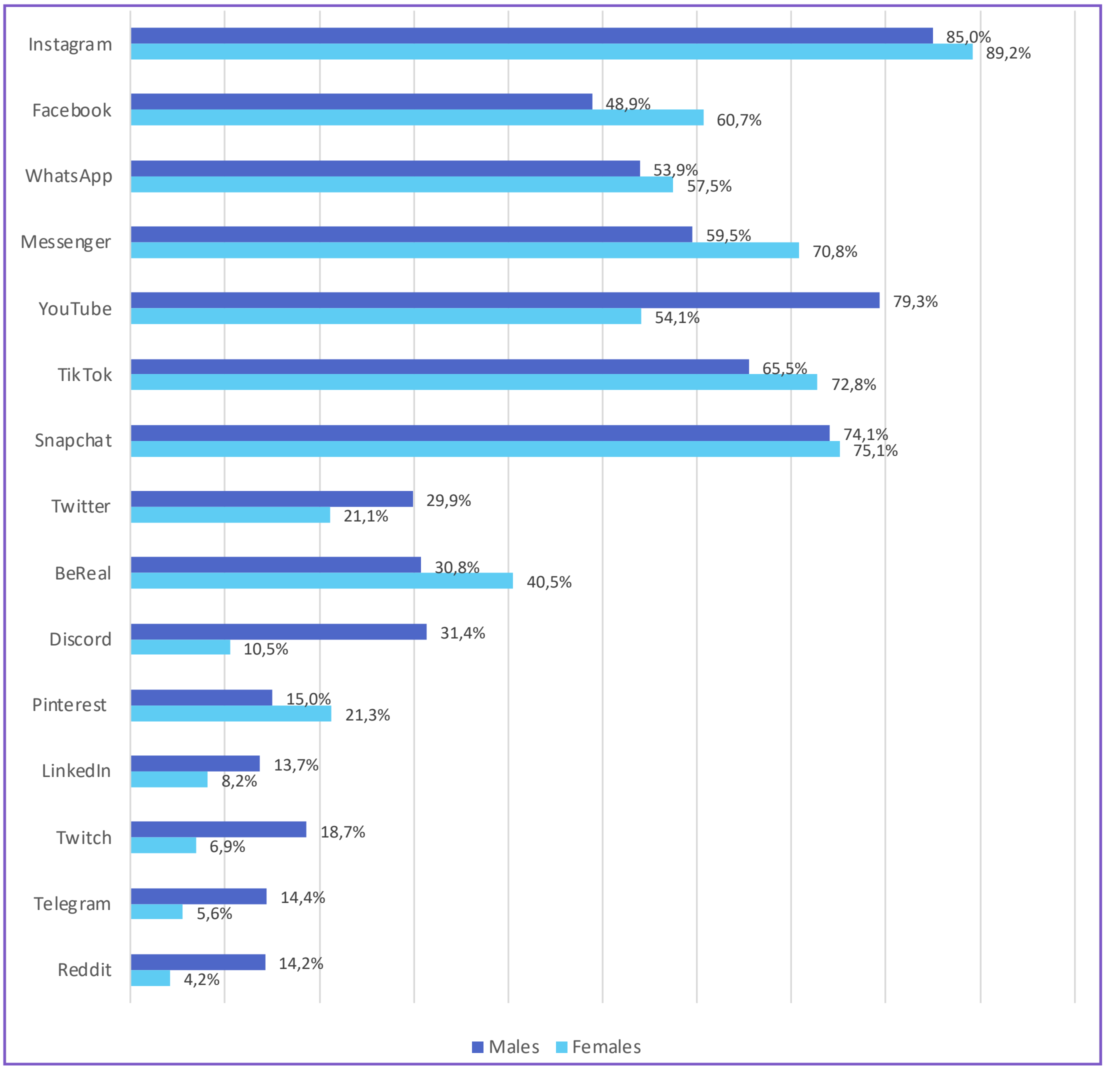

Figure 9 Daily social media use among 16–24-year-olds according to gender (in %)

DIFFERENCES IN SOCIAL MEDIA USE AMONG YOUNGSTERS BY LANGUAGE GROUP

The top 3 daily used social media channels among Dutch-speaking youngsters are Instagram (88%), Snapchat (73,3%) and TikTok (68,9%). Among French-speaking youth, the top 3 consists of Instagram (84,8%), Snapchat (75,5%) and YouTube (74,2%). The graph below provides more details on differences daily social media use between both groups. When comparing social media use between Dutch- and French-speaking youngsters, we note the following key differences:

- Dutch-speaking youth use Instagram, Facebook, Messenger, WhatsApp, and BeReal more frequently on average than French-speaking young people. It seems that BeReal is mostly popular among Dutch-speaking female youth.
- French-speaking youths seem more focused on YouTube and niche-platforms Twitch and Discord more often than Dutch-speaking youngsters on average. Niche-platforms in general seem to be more frequently used among French-speaking youth.
- There is no difference between language groups for TikTok and Snapchat.

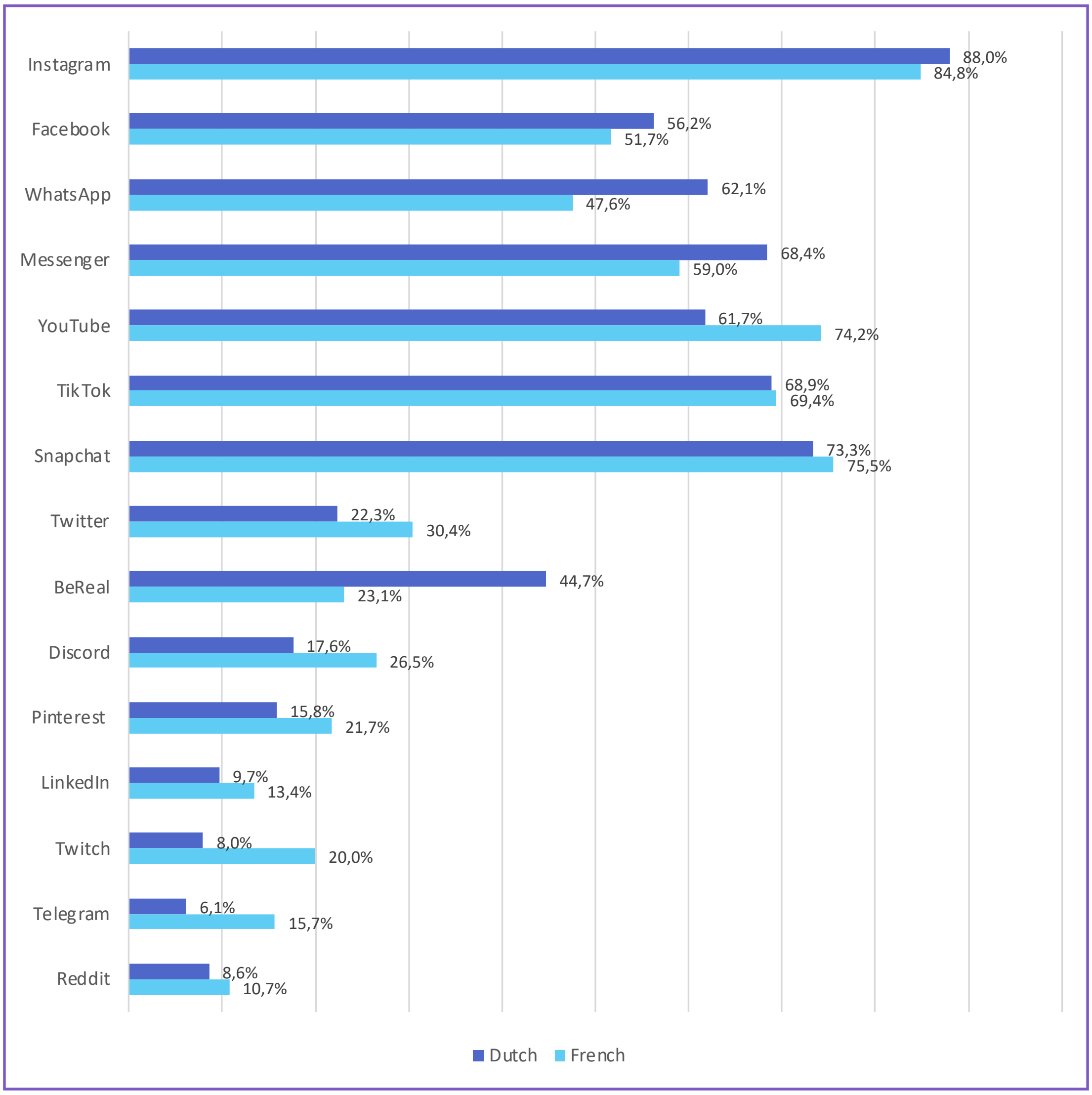

Figure 10 Daily social media use among 16-24 year-olds according to gender (in %)

Focus on +25

FACEBOOK, WHATSAPP AND MESSENGER ARE THE MOST FREQUENTLY USED SOCIAL MEDIA PLATFORMS AMONG BELGIAN +25 YEAR-OLDS

Figure 11 provides an overview of the social media use of Belgians between 25 and 39 years (in %). By comparing daily and monthly use, we gain insights into which platforms are use most intensively and which platforms are used most.

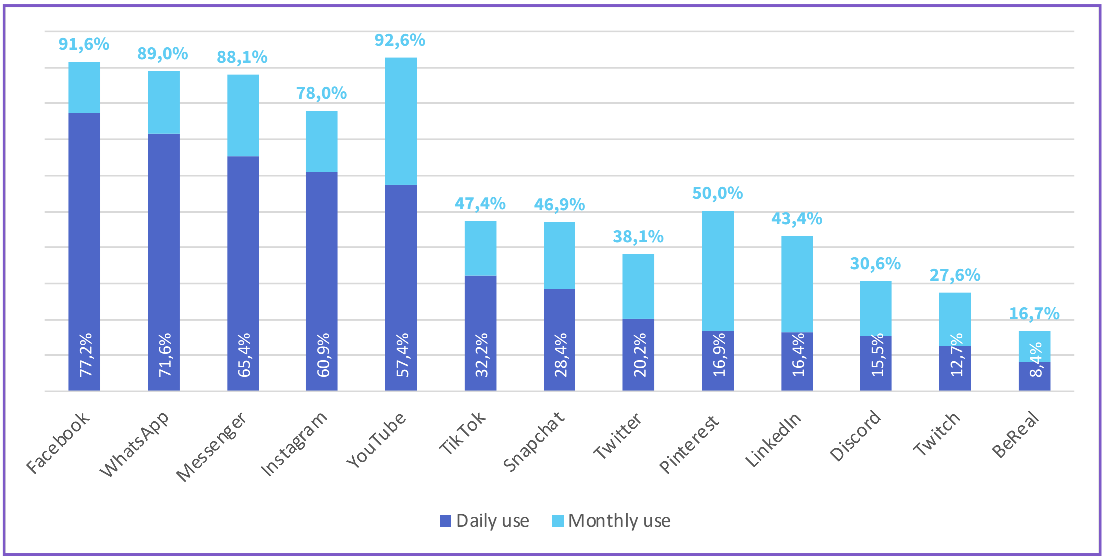

Figure 11 Comparison of daily and monthly social media use among Belgian +25 year-olds (in %)

DIFFERENCES IN SOCIAL MEDIA USE AMONG MALE AND FEMALE +25 YEAR-OLDS

The top 3 daily used social media channels among male +25 year-olds are Facebook (71%), WhatsApp (69,1%) and YouTube (68,7%). Among female +25 year-olds, the top 3 consists of Facebook (83,6%), WhatsApp (74%) and Messenger (68,6%). Instagram is also an important channel among males (57,8%) and females (64,1%). The graph below provides more details on differences daily social media use between both groups.

There are quite a few differences in social media use between men and women. The main differences are:

Facebook and Instagram are on average more frequently used by females.

- YouTube, TikTok, Snapchat and Twitter are on average more frequently used by males compared to females.
- Messaging services WhatsApp and Messenger are more frequently used among females.
- Most niche-platforms are on average more frequently used by males compared to females.

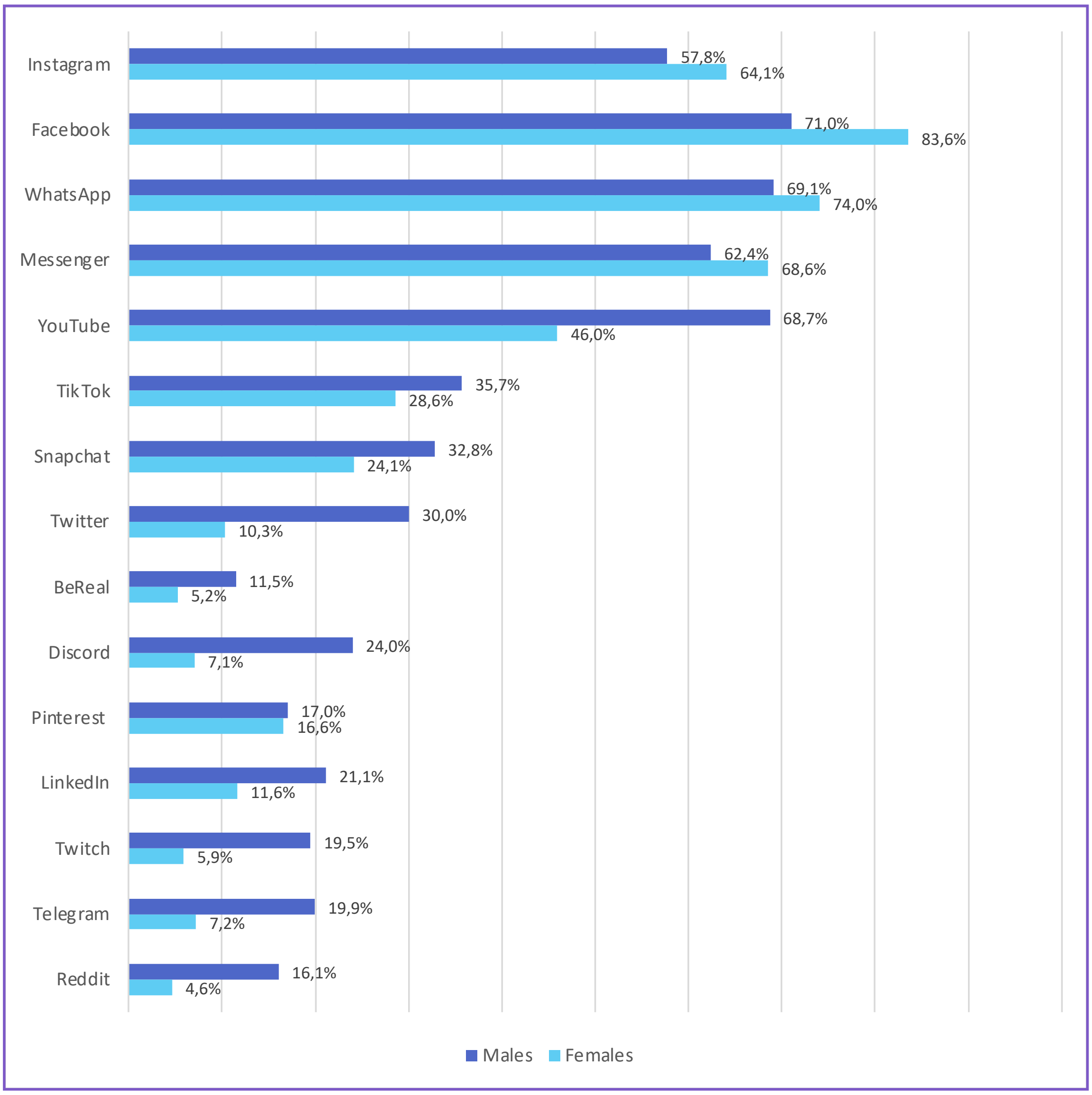

Figure 12 Daily social media use among 25+ year-olds according to gender (in %)

DIFFERENCES IN SOCIAL MEDIA USE AMONG +25 YEAR-OLDS BY LANGUAGE GROUP

The top 3 daily used social media channels among Dutch-speaking +25 year-olds are WhatsApp (79,9%), Facebook (75,8%) and Instagram (61%). Among French-speaking +25 year-olds, the top 3 consists of Facebook (79%), Messenger (71,2%) and YouTube (65,8%). The graph below provides more details on differences daily social media use between both groups.

A comparative analysis of average social media use between Dutch-speaking and French-speaking +25 year-olds shows that French speakers are generally more engaged in social media. Furthermore, these are the most important differences:

- WhatsApp is more frequently used among Dutch-speaking +25 year-olds, Messenger is more frequently used among French-speaking 25 year-olds.
- There is no difference in average frequency of use for Instagram, Pinterest and BeReal.
- When we look into daily use, in particular TikTok, YouTube and Snapchat stand out in particular with more active users in French-speaking Belgium.

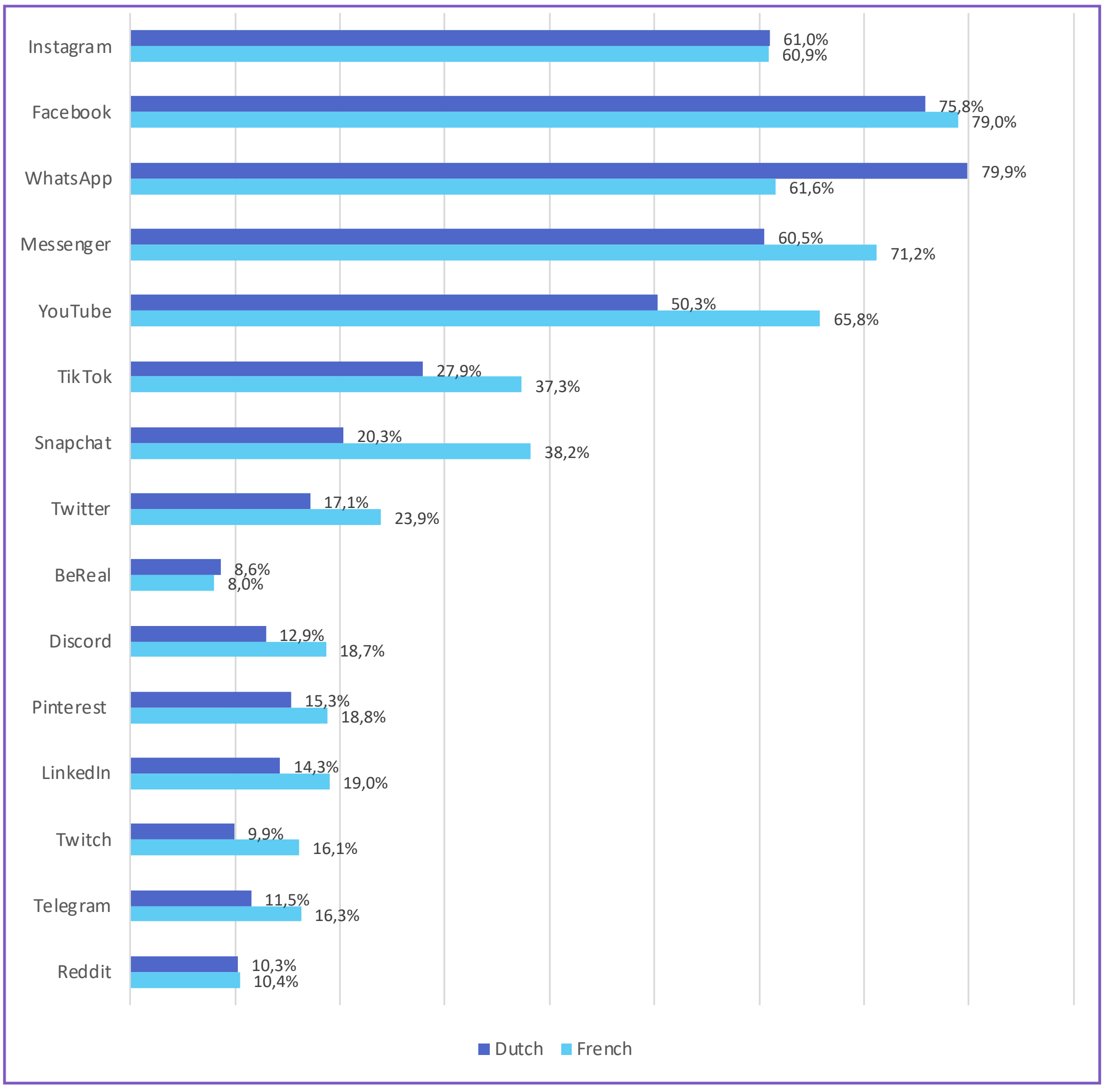

Figure 13 Daily social media use among 25+ year-olds according to language-group (in %)

Uses and gratifications of social media

KEY INSIGHTS:

- Social media are a social lubricant and remain the go-to for staying connected with friends and family. The main reasons why Belgians use social media are staying informed about activities and interacting with friends and family, relaxing and passing time, gaining inspiration and to learn something.
- The Meta-platforms Facebook and Instagram are best at fulfilling different roles.
- Youngsters (16-24 y.o.) use a broader range of channels to interact with friends and family, compared to +25-year-olds who mainly use Messenger and WhatsApp.
- Youngsters use Facebook in a more functional way, while +25-year-olds still actively post on Facebook.
- Niche channels such as Twitter, Pinterest, Discord, LinkedIn and Twitch are often used for a specific purpose (e.g. career, gaming, inspiration, news updates).

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

Mostly, main reasons for use were the same for 16-24 year-olds and +25 year-olds, but we noticed remarkable differences for some social media. For 16-24 year-olds for instance 'relax, pass time' is not among the top 3 reasons why they use Facebook, while this is reason number 2 to use Facebook for 25+ year-olds and an overall important reason for youngsters to use social media. Furthermore, 25+ year-olds more frequently post updates, photos and videos on Facebook compared to 16-24 year-olds. 'To stay informed about activities of influencers, celebrities, athletes,…' was only a top 3 reason for +25 year-olds to use Twitter, while for youngsters this was the case for Twitter, YouTube and Twitch. In the following paragraphs, we zoom in on the extent to which different social media platforms fulfil different roles.

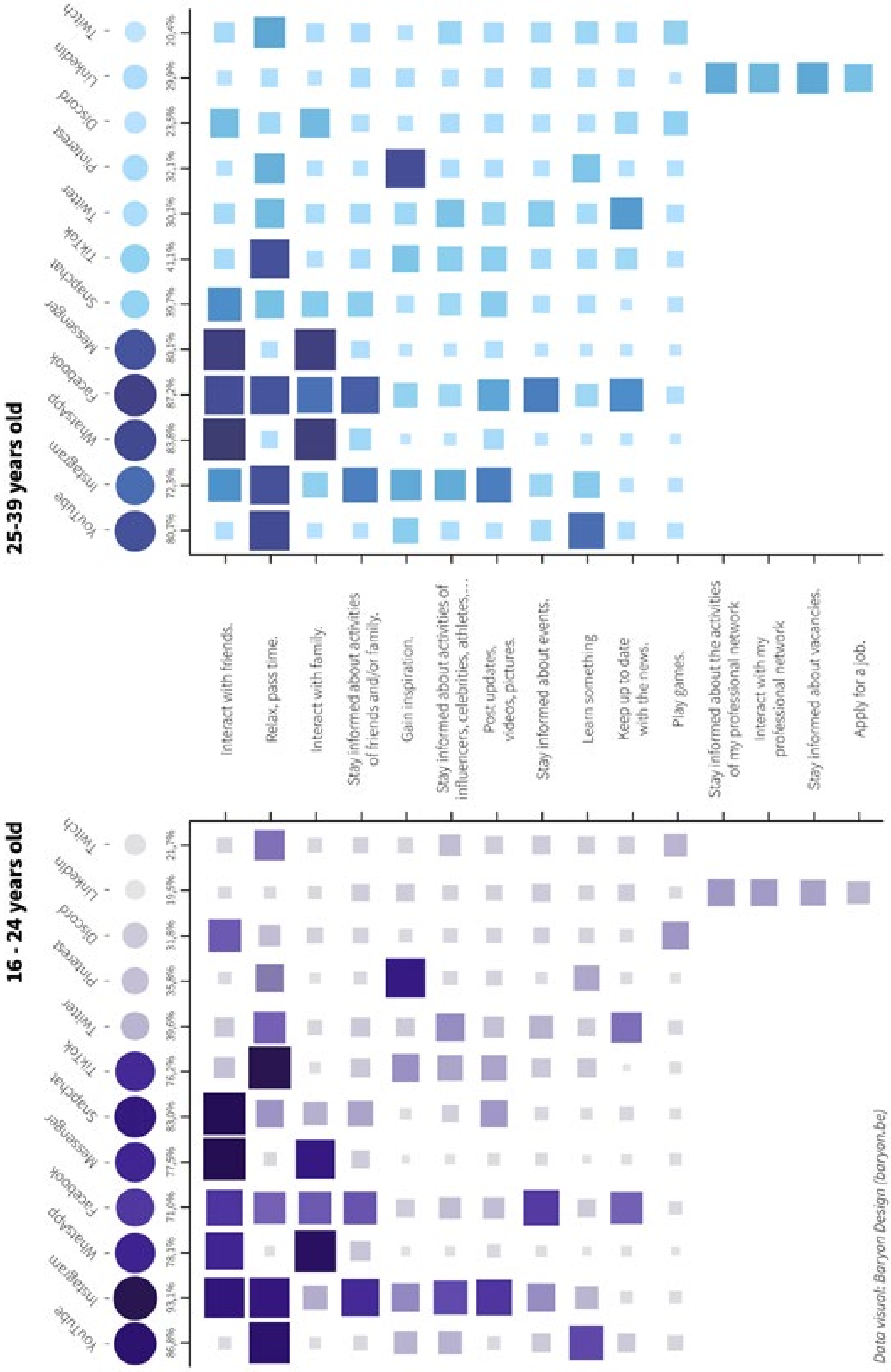

Figure 14 Uses and gratifications of different social media platforms according to age groups

SOCIAL MEDIA AS A FAVOURITE PASTIME

Foremost, people turn to social media to relax and pass time. Hence, it is among the top 3 reasons to use Instagram, TikTok, Snapchat, Twitter, YouTube, Pinterest, Twitch and Discord. Here again, it appears that youngsters use Facebook in a different manner than +25 year-olds, as only for 25+ year-olds, relaxing and passing time is a main reason to use Facebook.

Among youngsters, 57,6% uses Instagram to relax and pass time, followed by YouTube (56,5%) and TikTok (54%). Among +25 year-olds, 47% uses Facebook to relax and pass time, followed by YouTube (45,8%) and Instagram (39,6%).

Furthermore, some social media lend themselves perfectly for gaming. Hence, playing games is reason no. 2 to use Discord and reason no. 3 to use Twitch among both age categories. 4,6% of youngsters and 4,3% of +25 year-olds plays games on Twitch and 10,9% of youngsters and 5,9% of 25+ year-olds plays games on Discord.

"ET TIKTOK POUR PASSER LE TEMPS, LE FAIT D'AVOIR PLEIN DE VIDÉOS SUR DES CONTENUS DIFFÉRENTS ÇA ME PLAIT." // "JE REGARDE CE QU'ON ME PROPOSE." // "C'EST ÇA QUI EST BIEN SUR TIK TOK ON DÉCOUVRE PLEIN DE TRUCS."
MAN, 17 Y.O.

"OUI J'AI L'APPLICATION DISCORD ET JE L'UTILISE DE TEMPS EN TEMPS. JE L'UTILISE POUR PARLER AVEC DES AMIS OU POUR TROUVER DES JOUEURS SUR DIFFÉRENTS JEUX VIDÉO."
MAN, 16 Y.O.

"TIKTOK OOK ALS AMUSEMENT (OOK INSTAGRAM). ALS IK NIETS TE DOEN HEB, DUS IK BEN NIET AAN HET WERKEN OF AAN HET STUDEREN.. EN IK HEB OP AL MIJN BERICHTEN GEANTWOORD, AL HET NOODZAKELIJKE GEDAAN, DAN ZAL IK OP TIKTOK EN INSTAGRAM BEGINNEN SCROLLEN (ALS LAATSTE OPTIE). HET IS MEER EEN VRIJETIJDSBEDRIJF WANNEER IK DUS ECHT NIETS TE DOEN HEB… TIKTOK GEBRUIK IK WEL MEER (ENKEL VOOR TE KIJKEN, ZELF POST IK NIETS OP TIKTOK)."
WOMAN, 22 Y.O.

The **entertaining value** of TikTok was also confirmed by the retailers we spoke to and they are capitalizing on it in their content strategy as well.

> *"TikTok is een echt entertainmentplatform dus dat is ook waarvoor we het gebruiken. Dat doen we door onze TikTok-content een entertaining touch te geven. Vinden we een contentvideo zelf niet entertaining genoeg? Dan zullen we die eerder als inspirational content pushen via kanalen die op dat vlak strategisch interessanter zijn, zoals Instagram of Pinterest."*
> ***Nicky Blondé,*** *Beliving*

Furthermore the **importance of authenticity** on TikTok was often mentioned.

> *"Ik denk dat het belangrijk is dat de content gewoon authentiek is, dat je dicht bij jezelf blijft en ook humor gebruikt. Dat je mensen een stukje dichter bij het merk laat komen, omdat het wel een platform is waar mensen toch een ander type content verwachten van een merk dan als je bijvoorbeeld naar Facebook of Instagram kijkt."*
> ***Nicky Ruisch,*** *The Body Shop*

SOCIAL MEDIA TO STAY CONNECTED

To stay informed about the activities of friends and family, Facebook and Instagram are the most important channels. 30,1% of the youngsters uses Facebook and 51,1% Instagram; for +25 year-olds, 44,1% uses Facebook and 31,2% Instagram to stay connected.

For staying up to date about events, Facebook and Instagram are the main channels for youngsters (resp. 35,2% and 29,2%), while for +25 year-olds (38%) this is mainly Facebook. For youngsters, staying up to date about events is even the second most important reason to use Facebook today.

"INSTAGRAM GEBRUIK IK OM CONTACT HOUDEN MET VRIENDEN. KIJKEN DAAR ZIJ MEE BEZIG ZIJN. OOK CHATTEN."
WOMAN, 21 Y.O.

"OM FOTO'S TE PLAATSEN VAN MEZELF EN OOK VOOR DE PLAATS WAAR IK WERK, EN OM NAAR DE FOTO'S EN STORIES VAN ANDEREN TE KIJKEN. OP INSTAGRAM VOLG IK VEEL MENSEN DIE INTERESSANTE OF LEUKE DINGEN POSTEN, MAAR DIE IK NIET KEN. TERWIJL OP FACEBOOK VOEG IK ENKEL MENSEN TOE DIE IK PERSOONLIJK KEN."
WOMAN, 24 Y.O.

"VAAK ONTDEKTE IK HET VIA INSTAGRAM EN STAAT MEER INFO OVER HET EVENT OP FACEBOOK."
WOMAN, 21 Y.O.

"VOOR EVENEMENTEN ALS FUIVEN HIER IN DE BUURT OF FEESTJES OP CAFÉ GEBRUIK IK FACEBOOK. VOOR GROTERE FESTIVALS ALS BV WERCHTER, KIJK IK EERDER OP HUN INSTAGRAM/WEBSITES."
WOMAN, 19 Y.O.

"...POUR EN GÉNÉRAL LES ÉVÉNEMENTS. FACEBOOK EST UNE BONNE APPLI POUR CRÉER DES ÉVÉNEMENTS (SOIRÉES, FESTIVALS,…)"
MAN, 17 Y.O.

"JE DIRAIS SUR INSTAGRAM PRINCIPALEMENT OU JUSTE DE LA BOUCHE À OREILLE."
MAN, 16 Y.O.

For Facebook, Instagram, Snapchat, Discord, WhatsApp and Messenger interacting with friends or family is among the top 3 reasons to use the platform, both for youngsters and +25 year-olds. For youngsters, the main social media to interact with friends are Instagram (58,4%), Snapchat (57,8%), Messenger (54,5%) and WhatsApp (54,5%).

"INSTAGRAM IS VOORAL VOOR COMMUNICATIE MET VRIENDEN EN NIEUWE MENSEN LEREN KENNEN, OOK VOOR HET ONTDEKKEN VAN NIEUWE PRODUCTEN. INSTAGRAM IS GEWOON NOG NET IETS BELANGRIJKER GEWORDEN OP VLAK VAN COMMUNICATIE MET VRIENDEN BIJ MIJ."
WOMAN, 23 Y.O.

"JE COMMUNIQUE AVEC MES AMIS SUR LES DEUX, OUI. MAIS INSTAGRAM EST PLUS GÉNÉRAL, C'EST PLUS CENTRÉ SUR LE PARTAGE ET IL N'Y A PAS QUE MES AMIS DIRECT ET PROCHES QUI Y AURONT ACCÈS, C'EST UN MOYEN PARFOIS DE DÉCOUVRIR ET PARLER À D'AUTRES PERSONNES. PAR CONTRE SNAPCHAT JE N'AI QUE MES AMIS DESSUS ET ON PEUT FACILEMENT SE PARLER ET PARTAGER PLEINS DE PHOTOS ET VIDÉOS ENTRE NOUS."
WOMAN, 16 Y.O.

"SNAPCHAT GEBRUIK IK VOORAL OM TE COMMUNICEREN MET MIJN VRIENDEN EN KENNISSEN. OMDAT AL MIJN VRIENDEN COMMUNICEREN VIA SNAPCHAT."
MAN, 16 Y.O.

"SNAPCHAT GEBRUIK IK VOORAL OM TE COMMUNICEREN MET MIJN VRIENDEN, HET IS OOK GEWOON EENS LEUK OM TE ZIEN WAT ZE OP DAT MOMENT NU NET BEZIG ZIJN."
WOMAN, 18 Y.O.

"POUR MES AMIS, SNAPCHAT SINON POUR LA FAMILLE ON A UN GROUPE MESSENGER."
MAN, 17 Y.O.

"WHATSAPP VOOR FAMILIE EN WERK WHATSAPP GEBRUIK WANT MET VRIENDEN GEBRUIK IK INSTAGRAM."
WOMAN, 23 Y.O.

To interact with family, the most used social media are WhatsApp (52,2%) and Messenger (49,3%). +25 year-olds mainly use WhatsApp and Messenger to interact with friends (54,2% and 52,2%) and family (52,2% and 49,3%), to interact with friends, 48,5% also mentioned Facebook.

"WHATSAPP IS VOORNAMELIJK VOOR CONTACT TE HOUDEN MET MIJN FAMILIE, DIT ZIJN OUDERE PERSONEN EN HEBBEN UITERAARD VAAK ENKEL WHATSAPP EN GEEN ANDERE SOCIALE MEDIA."
WOMAN, 22 Y.O.

"LA FAMILLE C'EST UNIQUEMENT SUR WHATSAPP."
MAN, 16 Y.O.

"WHATSAPP EST LE RÉSEAU QUE J'UTILISE LE MOINS. POUR ÊTRE HONNÊTE, JE L'UTILISE JUSTE POUR APPELER DES PROCHES GRATUITEMENT AHAH"
MAN, 17 Y.O.

SOCIAL MEDIA AS A SOURCE OF INSPIRATION

Social media are a main source of inspiration to youngsters and +25 year-olds. For TikTok, YouTube, and Pinterest, gaining inspiration was mentioned as one of the top 3 reasons to use the platform, for both age groups. The no. 1 reason to use Pinterest remains its inspirational value (for both age groups).

"TER INSPIRATIE… PINTEREST BIEDT VEEL MEER INFO DAN ANDERE APPS. IK VIND MEER REFERENTIEBEELDEN OP PINTEREST DAN OP INSTAGRAM."
MAN, 18 Y.O.

"POUR LE DESSIN J'UTILISE BEAUCOUP PLUS PINTEREST, J'AVAIS COMMENCÉ AVEC DES TUTOS SUR YOUTUBE MAIS ÇA DEVENAIT UN PEU LONG SINON PARFOIS JE TOMBE SUR DES RÉELS SUR INSTAGRAM INTÉRESSANTS ET JE LES SAUVEGARDE."
MAN, 17 Y.O.

"(REFERRING TO PINTEREST) GÉNÉRALEMENT QUAND J'AI BESOIN D'INSPIRATION POUR DE LA DÉCORATION PAR EXEMPLE, DE FAIRE MES POWERPOINT, DES MOOD BOARDS,..." ***WOMAN,*** 16 Y.O.

Although gaining inspiration is no top 3 reason to use Instagram (as there are other, more prominent activities in which people engage), Instagram is an important channel for inspiration as well. 30,1% of the 16-24 year-olds uses Instagram to gain inspiration and 25,2% of the +25 year-olds. For youngsters TikTok (23,1%), Pinterest (21,7%) and YouTube (19,1%) are also main channels for inspiration, while for +25 year-olds, these are YouTube (19,4%), Facebook (18,4%) and Pinterest (17,8%).

"OP TIKTOK ZIT IK (VEEL TE) VAAK. DIE APP GEBRUIK IK VOOR INSPIRATIE, OM IDEEËN OP TE DOEN EN EIGENLIJK GEWOON OM MIJN GEDACHTEN TE VERZETTEN (VERSLAVENDE GEWOONTE)."
WOMAN, 20 Y.O.

"DOOR ALGORITMES IS ER OP DEZE APP ALTIJD WEL IETS TE ZIEN DAT IK INTERESSANT VIND (KOKEN/ZINGEN/BOEKEN/…), IK ZIE DIT NIET ALS COMMUNICATIEMIDDEL (HOEWEL DEZE FUNCTIE ER WEL IS) MAAR ALS AMUSEMENTSAPP. IK GEBRUIK TIKTOK IETS MEER DOORDAT DEZE APP ECHT WEL JE INTERESSES VOLGT EN OMDAT JE EEN SOORT VAN MINI SOCIALE DRUK VOELT OM MEE TE ZIJN MET WAT ER HIEROP TE ZIEN VALT, OM MEE TE ZIJN MET DE HYPES. EIGENLIJK VRIJ WEINIG… OP TIKTOK IS ALLES ZOWAT ALTIJD AFGESTELD OP WAT IK WIL ZIEN EN MOET IK DE KNOP "NIET GEÏNTERESSEERD"NIET ZO VAAK GEBRUIKEN! SOMS ZIJN ER WEL DINGEN WAARVAN JE DENKT "OEI NIET BINNEN MIJN INTERESSEVELD"MAAR DAN WORDT AL SNEL DUIDELIJK DAT DE POST/VIDEO EEN NIEUWE TREND LAAT ZIEN OFZO."
WOMAN, 19.Y.O.

"PINTEREST OU PARFOIS INSTAGRAM ET TIKTOK. MAIS ESSENTIELLEMENT PINTEREST."
WOMAN, 19 Y.O.

"J'UTILISE QUAND MÊME YOUTUBE POUR DES TUTOS ET PINTEREST AUSSI."
MAN, 17 Y.O.

The power of platforms like Instagram and Pinterest to inspire was also addressed by retail brands.

> *"Social media users zoeken op Instagram en Pinterest echt naar nieuwe trends. Ze doen er inspiratie op voor hun eigen kleerkast of interieur. Wij focussen voornamelijk op Instagram, omdat het een echt belevingskanaal is. En beleving is natuurlijk waar het om draait bij Juntoo en Exterioo. We inspireren er ons doelpubliek met mooie foto's en mooie producten."*
> ***Nicky Blondé,*** *Beliving*

Despite being a niche channel, Pinterest's branding capabilities are being recognized by some retail brands.

> *"Het is wel een mooi kanaal om een hele nieuwe doelgroep te bereiken en omdat het wel heel veel verkeer kan genereren naar je webshop als je het goed aanpakt. Bij Pinterest zie je ook dat idea pins bijvoorbeeld heel erg goed werken. Dat is wel iets waar we mee zouden kunnen experimenteren."*
> ***Nicky Ruisch,*** *The Body Shop*

SOCIAL MEDIA FOR LEARNING

To learn something, young people mostly turn to YouTube (39,4%), TikTok (23,2%) and Instagram (19,5%) while +25 year-olds use YouTube (38,2%), Instagram (18%) and Facebook (16,2%). Despite its lower number of frequent users among 25+ year-olds, about 11% uses TikTok to learn something.

"YOUTUBE GEBRUIK IK HET MEEST OM EFFECTIEF IETS TE LEREN VOOR MIJN HOBBIES."
MAN, 20 Y.O.

"YOUTUBE GEBRUIK IK ZELDEN TOT NOOIT, ALS IK HET GEBRUIK IS HET OM IETS NUTTIGS OP TE ZOEKEN BV EXTRA INFORMATIE OVER EEN BEPAALD ONDERWERP."
WOMAN, 18 Y.O.

"JE REGARDE YOUTUBE POUR ME DIVERTIR EN REGARDANT MES YOUTUBERS PRÉFÉRÉS, DONC DES VIDÉOS DRÔLES, INSPIRANTES, ... OU ALORS POUR L'ÉCOLE, POUR REVOIR UNE PARTIE DE MATIÈRE QUE JE N'AI PAS BIEN ASSIMILÉE OU REVOIR LE CHAPITRE."
WOMAN, 16 Y.O.

"YOUTUBE GEBRUIK IK ALS IK ECHT IETS SPECIFIEKS ZOEK. BV UITLEG OVER EEN BEPAALD COMPUTER PROGRAM VOOR SCHOOL. TIKTOK GA IK NIET ECHT OP ZOEK NAAR IETS. IK KOM MEESTAL IETS TEGEN DAN SLA IK HET OP OF PROBEER HET EENS. TIKTOK IS MEESTAL TE KORT OM IETS UITGEBREIDER OP TERUG TE VINDEN. DE VIDEO'S ZIJN KORTER EN SOMS MOET JE IETS DIEPER OP EEN ONDERWERP IN GAAN OM HET TE BEGRIJPEN."
WOMAN, 21 Y.O.

"DE L'INSPIRATION ET DES TUTORIELS QUAND JE NE SAIS PAS FAIRE QQCHOSE (REFERRING TO YOUTUBE)."
MAN, 17 Y.O.

"ALORS J'UTILISE AUSSI YOUTUBE POUR REGARDER DES VIDÉOS SUR DES VOITURES (VIDÉOS HUMORISTIQUES DE GENS QUI MODIFIENT LEUR VOITURE), JE REGARDE AUSSI MES INFLUENCEURS PRÉFÉRÉS ET LEURS VIDÉOS DE TOUT GENRE (VRAIMENT IL Y A DE TOUT ET C'EST ÇA QUE J'ADORE) ET SI JAMAIS J'AI ENVIE ALORS JE REGARDE DES VIDÉOS OÙ JE PEUX APPRENDRE DES CHOSES."
MAN, 17 Y.O.

SOCIAL MEDIA AS A NEWS SOURCE

For most social media, keeping up to date with the news was not one of the top-3 reasons to use a specific platform, except for Twitter for +25 year-olds. For youngsters, Instagram (38,2%) and Facebook (28,4%) are the main social media sources of news, followed by Twitter (14,7%). For +25 year-olds, these are Facebook (34,8%), Instagram (16,3%) and Twitter (11,2%).

"DAAR GEBRUIK IK NAAST INSTAGRAM GEEN APPS VOOR, MAAR KIJK IK GEWOON NAAR HET NIEUWS OP TV. EN OP INSTAGRAM ZIE IK DAT SOMS TOEVALLIG OOK VOORBIJKOMEN ZOALS IEMAND ANDERS DIE EEN NIEUWSBERICHT DEELT."
WOMAN, 23 Y.O.

"MAIS JE NE SUIS PAS BEAUCOUP LES ACTUALITÉS ET SI JE LE FAIS C'EST SOIT INSTAGRAM, L'ÉCOLE OU LE JOURNAL."
WOMAN, 17 Y.O.

MIRROR, MIRROR ON THE WALL, WHICH IS THE BEST FILTER OF THEM ALL?

About 50% of the Belgians (up to 39 years) uses filters or software when posting photos or videos online. There is no significant difference in average amount of filter use between the two age groups, nor between males or females, nor between language groups.

"OUI J'UTILISE DES FILTRES MAIS PAS DE FILTRES DE BEAUTÉ PLUTÔT DES FILTRES DRÔLES POUR AMUSER MES AMIS. INSTAGRAM. PARCE QU'ILS SONT PLUS ORIGINAUX JE TROUVE (REFERRING TO THE FILTERS OF INSTAGRAM)."
MAN, 16 Y.O.

"…PARFOIS J'UTILISE DES FILTRES PLUTÔT POUR RIRE OU QUOI PAS POUR CACHER DES IMPERFECTIONS, ETC"
WOMAN, 16 Y.O.

LINKEDIN AS WORK-RELATED SOCIAL MEDIA PLATFORM

Because LinkedIn specifically profiles as business and employment-focused social media platform, we gauged for some extra activities people can engage in on this platform specifically. Hence, 5,6% of 16-24 year-olds and 10,2% of +25 year-olds uses LinkedIn to stay informed about the activities of their professional network. 5,5% of 16-24 year-olds and 9,4% of +25 year-olds uses LinkedIn to interact with their professional network. 5,1% of 16-24 year-olds and 10,4% of +25 year-olds uses LinkedIn to stay informed about vacancies and 4% of 16-24 year-olds and 8,7% of +25 year-olds has ever applied for a job through LinkedIn.

Social media & brands

KEY INSIGHTS:

- Social media are an important platform to get to know brands or products and find information about brands. The most often used platforms where Belgians get to know brands or products and find information are Instagram, TikTok, YouTube and Facebook.
- Conversion (clicking through to a brand's webshop or brands) mainly happens on Instagram and Facebook.
- Belgians do not engage that much in reviewing or contacting brands through social media. Retail brands do acknowledge the importance of tracking conversations about their brand and being accessible to customers.
- Social shopping is still in its infancy in Belgium, while clicking through to a brand's website or webshop is more commonplace. The retail brands we spoke with acknowledge social shopping is a trend to take into consideration, however, the technical possibilities to fully incorporate social shopping are limited up to date.
- Discount codes are better appreciated than giveaways.

SOCIAL MEDIA AS A CRUCIAL BRAND TOUCHPOINT

To better grasp the potential of social media for brands, we asked active social media users to indicate from a list which brand-related activities they had already undertaken per platform. Only frequent users of the respective social medium (= respondents who use the medium at least weekly) were taken into consideration. The following figure shows the main brand-related activities frequent users engage in per social media platform. The various platforms are listed in order of frequency of use among all age groups (left = most often used, right = least often used).

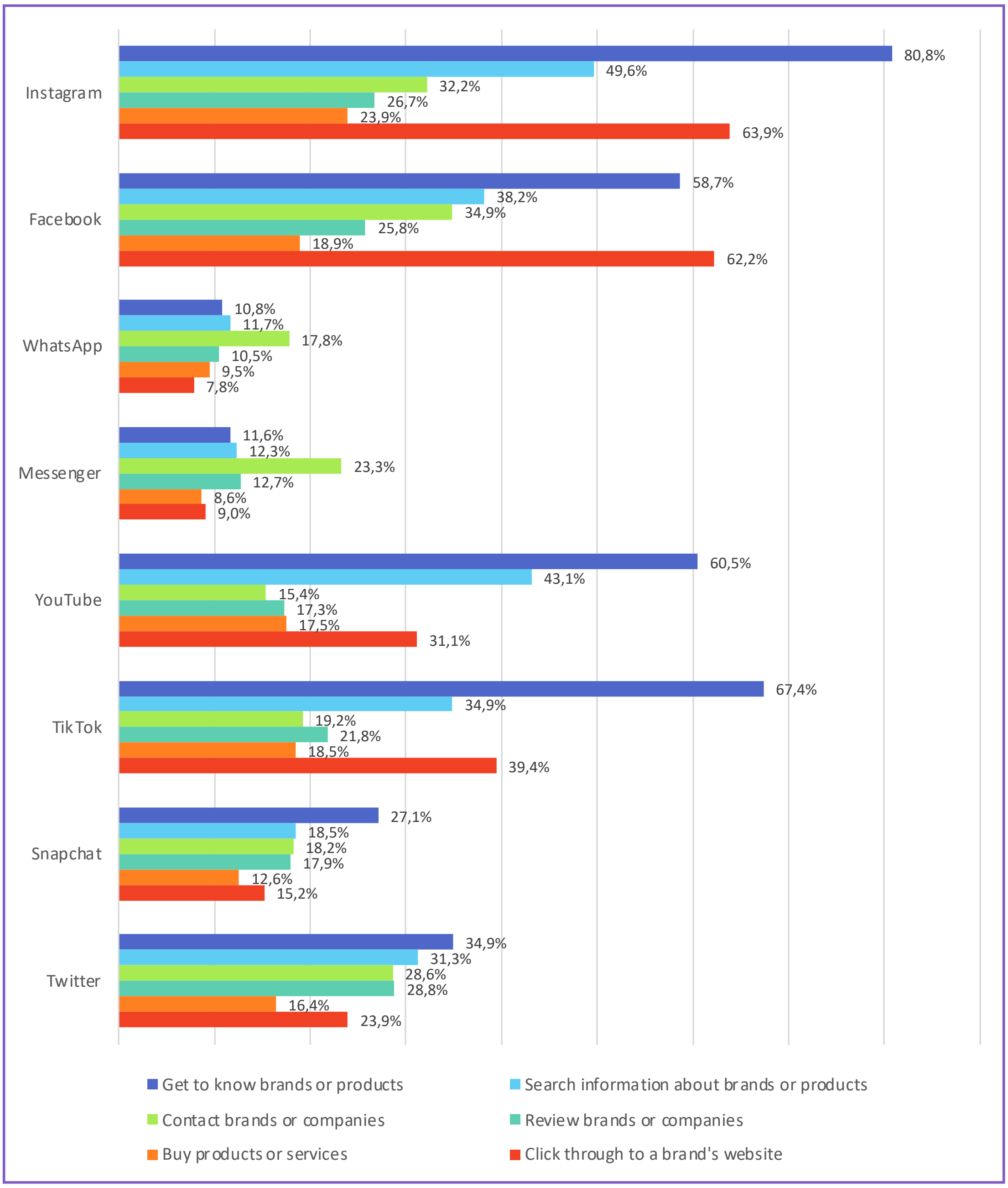

Figure 15 Belgians' engagement in brand-related activities on social media (expressed in % of frequent users who engage in the activity)

Next, we conducted an analysis on brand-related activities on social media, while taking into account the level of use of each social media platform. From our analysis, it appears that Facebook (mainly for +25 year-olds), Instagram and YouTube remain the most important channels for brands. When targeting youngsters, TikTok is also an important channel to consider. These findings are in line with the frequency of use of each of these channels.

Furthermore, it's important to mention that in particular among adults, WhatsApp (13,7%) and Messenger (17,3%) are important channels to contact brands. In the following figures, we provide an overview of different brand-related activities that people may engage in on social media and to what extent Facebook, Instagram, TikTok and YouTube are used for this purpose, both among youngsters and +25 year-olds.

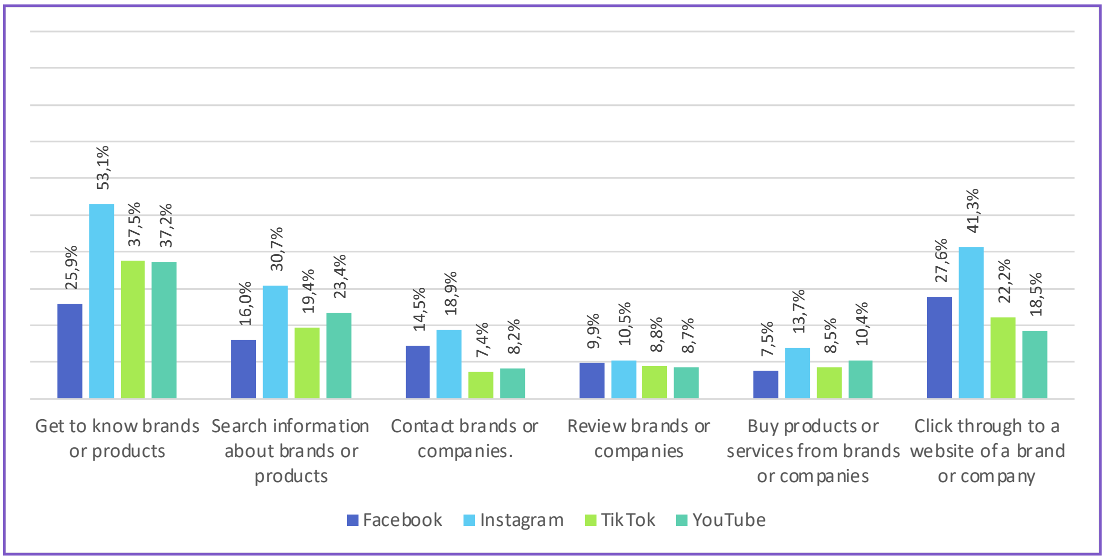

Figure 16 Youngsters' touchpoints with brands on Facebook, Instagram, TikTok and YouTube (expressed in % of people who engage in the activity)

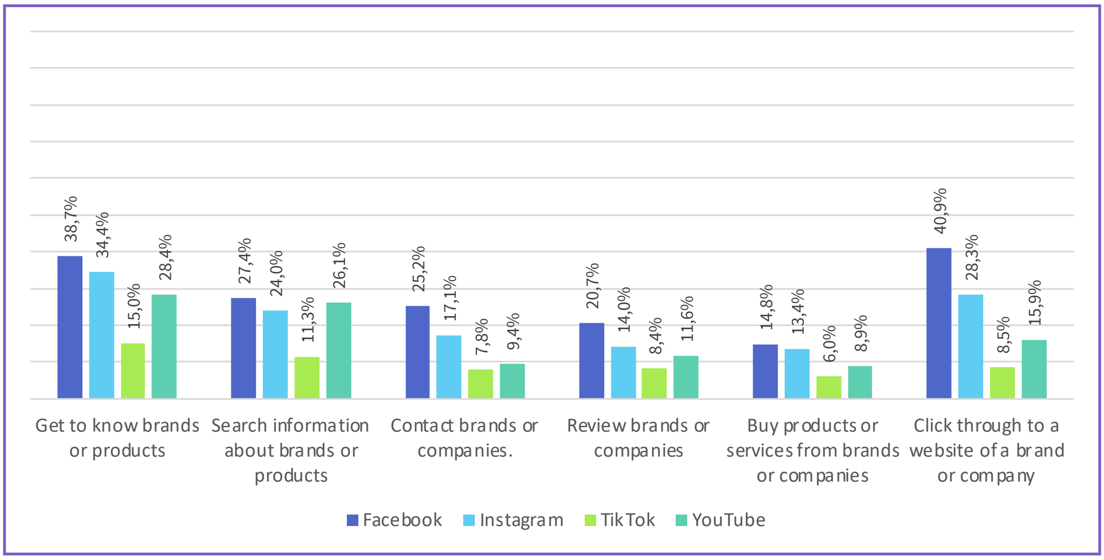

Figure 17 +25 year-olds' touchpoints with brands on Facebook, Instagram, TikTok and YouTube (expressed in % of people who engage in the activity)

SOCIAL SHOPPING

31,2% of the Belgians state they only use social media for inspiration and prefer to shop in the physical store or via the webshop. At the same time, social shopping is still in its infancy in Belgium. 7,8% has ever used webshops inside social media apps (e.g. Instagram shopping). Also the percentage of people who admit to click on ads or sponsored posts from brands is rather limited: 18,3%. We are aware that these numbers may differ from actual behavior. There are no remarkable differences between youngsters and +25 year-olds, between males and females or between language groups.

*"It is important to mention that the technical possibilities for social shopping are still very limited in Belgium to date" (**Jr. Malela,** Social Media Strategist). It is therefore not surprising that we also noticed on the retail side that social shopping is not yet fully deployed and that preference is given to generating traffic to their own web pages.*

"We zijn zeker aan het kijken naar social commerce en experimenteren hiermee. Dit is wel iets wat nog moet ingeburgerd worden merken we. Maar ik denk wel dat het in de toekomst een manier zal worden om zaken aan te kopen. Iedereen is het tegenwoordig ook al gewoon om met zijn mobile conversies te doen, waardoor het eigenlijk nog maar een kleine stap is."
***Melissa Boeykens,** Nespresso*

"Het is echt de bedoeling dat mensen doorklikken op onze website en daar gaan shoppen. We hebben ook een shop in Facebook, maar dat werkt niet zo goed. […] Aan de andere kant gebruiken we sociale media wel als testplatform voor content. Het is makkelijk om snel te testen wat goed of minder goed werkt. We proberen om thema's te testen op sociale media en die gaan we dan doortrekken naar mailing campagnes bijvoorbeeld. Sociale media zijn eigenlijk een testplatform voor ons."
***Louis Bar,** Brico*

"Een deel van onze catalogus pushen we sowieso door naar bijvoorbeeld Facebook. We gebruiken die zaken vooral om de remarketing campagnes op te zetten, maar met het rechtstreeks verkopen vanuit social media zijn we nog niet erg bezig."
***Eline Van Daele,** Standaard Boekhandel*

"We hebben de Facebookshop wel actief staan, maar we converteren daar niet. We gaan die conversie op ons kanaal binnentrekken."
***Francis Huysman,** WEBA*

"Op dit moment kiezen we ervoor om niet te verkopen via social commerce. We linken altijd door naar de webshop om de aankoop af te ronden."
***Nicky Blondé,** Beliving*

"We verkopen natuurlijk ook geen impulsproducten zoals cosmetica of kleren. Meubelen zijn investeringsgoederen die je niet zomaar aankoopt. Een aankoop bij ons zit al snel boven de 500 euro, dan is social commerce niet zo vanzelfsprekend. Op onze website kan je verschillende productfoto's bekijken, krijg je heel wat technische informatie en productspecificaties zoals de slijtvastheid van de materialen of pilling van stoffen. Een duurdere aankoop vraagt ergens meer onderbouwing zeg maar, en dat kan nog niet via social commerce."
***Thomas Vaarten,** Beliving*

DISCOUNT CODES ARE MORE APPRECIATED THAN GIVEAWAYS

56,6% of the Belgians is rather positive or very positive about **giveaways** on social media (prizes, products,... that are given away for free by brands). For youngsters, this percentage (55,9%) slightly decreased compared to last year (58,2%). There is no significant difference in average attitude towards giveaways between age groups and males and females. French-speaking people are on average more positive than Dutch-speaking about giveaways.

Furthermore, people tend to be positive about discount codes on social media. 65,7% is rather positive or very positive about discount codes provided by influencers, content creators, celebrities or brands. On average, +25 year-olds are less positive towards discount codes than 16-24 year-olds. Also, females, tend to be slightly more positive about discount codes than males. There is no significant difference between language groups.

Based on our qualitative interviews with youngsters the discount are codes considered more relevant while for giveaways the chance to win makes it fun but also less appealing compared to discount codes.

"OUI FIN JE ME DIS IMAGINONS QUE J'AI ENVIE D'ACHETER UN PRODUIT MAIS QUE JE LE TROUVE UN PEU CHER ET PUIS UN YOUTUBEUR PROPOSE -20% SUR LE PRODUIT BAH ÇA PEUT DU COUP T'AIDER À ACHETER LE PRODUIT. CE N'EST PAS QUELQUE CHOSE QUI ME DÉRANGE TANT QUE C'EST PRÉCISÉ ET NON FAKE."
MAN, 18 Y.O.

"KORTINGSCODES HEB IK NIETS TEGEN, SOMS KOMT HET MIJ GOED UIT WANNEER IK IETS AL EEN TIJDJE HAD WILLEN KOPEN, EN SPOORT DE KORTING MIJ AAN HET EFFECTIEF TE DOEN. GIVE AWAYS, DAAR DOEN IK EN MIJN VRIENDINNEN WEL VAAK AAN MEE, MAAR WE HEBBEN NOG NOOIT IETS GEWONNEN SOMS DENK IK DAT HET EEN SCAM IS. IK MAAK DAN VAN MIJN HART EEN STEEN EN VOLG DE STAPPEN: IK MOET HEN DAN VOLGEN (VIND IK ZEER IRRITANT) MAAR VANALS DAT DE GIVE AWAY VOORBIJ IS, ONTVOLG IK ZE WEER DIRECT."
WOMAN, 20 Y.O.

SOCIAL MEDIA MARKETING: PAY TO PLAY

Brands acknowledge that is has become very **hard to generate engagement on social media in an organic way**. Paid advertising has become the norm. Various explanations were mentioned. **High competition for attention** on social media, making it hard for brands to stand out and attract followers organically. Additionally, social media users have short attention spans and are easily distracted by other content. Hence it can be difficult for brands to keep their audience engaged over time. Furthermore, the sheer volume of content being produced and shared on social media platforms can make it hard for a brand's content to get noticed organically. Even if a brand's content is high-quality and relevant, it may get lost in the sea of other posts. But above all, algorithm changes were cited most often as a reason why paying has become a necessity. As generating social media content, in particular video content requires a lot of time, effort, and resources, it would simply be a shame that no one gets to see it.

> *"Wij doen bijna alles paid. Anders is je bereik soms zo minimaal dat het eerlijk gezegd weinig nut heeft. Ik denk dat er heel weinig nog organic wordt gepusht. [...]. Bij het opstellen van een campagne moet je altijd een ROI hebben, ook al is dat dan niet per se conversie, je wil toch ten minste een zeker bereik bij de doelgroep en dan is het een beetje stom om het niet paid te doen. Het is de moeite niet om iets te maken als het maar door 10 mensen gezien wordt bij wijze van spreken. Je wil niet dat je productiebudget groter is dan je mediabudget, want dat loont niet. Ik geloof wel in het hergebruiken van content. Je moet sowieso mensen voeden met nieuwe content, maar omdat je altijd andere mensen bereikt is het ook niet erg om content te hergebruiken maar die gewoon in een nieuw jasje te steken. Er moet een goede balans zijn tussen het creëren van nieuwe content en het repurposen (hergebruiken) van content."*
> ***Melissa Boeykens,*** *Nespresso*

> *"Facebook is natuurlijk meer een Pay to Play platform geworden, maar nog steeds interessant om aanwezig te zijn. Daar is onze doelgroep er ook gewoon nog steeds. Om een groter bereik en meer engagement te hebben op Facebook is het natuurlijk beter om te betalen. Je ziet gewoon dat Facebook het bereik enorm heeft beperkt. Inmiddels is dat zo klein dat je amper nog engagement behaalt met een gewone post die niet wordt geboost. Wat dat betreft is Facebook gewoon net wat lastiger tegenwoordig om daar engagement of een groot bereik te behalen, maar het is nog steeds een mooi platform waarop we onze doelgroep kunnen bereiken."*
> ***Nicky Ruisch,*** *The Body Shop*

> *"We hebben nog organic content, maar merken natuurlijk dat het dat moeilijker en moeilijker wordt. Als je er geen budget gaat achter zetten, met dat algoritme, wordt het moeilijk. We horen dat ook van onze ambassadors die op den duur niet meer weten wat werkt en wat niet. Het is zo raar soms. Wat wij zien dat heel goed werkt organisch op onze kanalen is UGC. Content gecreëerd door klanten of ambassador content werkt ook altijd goed. Qua content zien we een aantal pieken voor content waarvan we weten dat het goed gaat scoren, maar soms zijn er ook verrassingen waarvan we denken dat het bizar is. Dat is dan een random beeld, maar scoort super goed. Het is soms een moeilijke om qua organic te zien wat goed werkt en wat niet. Voor sommige zaken is dat nog altijd een beetje zoeken. De influencers zeggen zelf ook dat het vroeger heel duidelijk was wat ging werken, maar dat er nu geen lijn meer in ligt en dat ze het zelf niet weten."*
> ***Veerle De Taeye,*** *Casa*

TIKTOK IS BEING ADOPTED BY BRANDS AS A MARKETING CHANNEL

TikTok's more **widespread adoption** among a large and engaged user base is also being noticed by retail brands.

> *"In mijn beleving was een TikTok-doelgroep zeer jong. Maar als we dan naar de cijfers kijken, zien wij dat het niet zo jong is als wij dachten. Volgens mij verschuift de adoptie van dat platform in hoog tempo ook naar oudere leeftijdsgroepen."*
> ***Thomas Vaarten,*** *Beliving*

As a result, TikTok is increasingly being recognized as a **cost-effective platform** with **creative opportunities** and ad formats to reach their target audience in a variety of ways. TikTok offers several ad formats, including in-feed ads, brand takeovers, and sponsored hashtag challenges, that allow brands to reach their target audience in a variety of ways. Also, compared to other social media platforms, TikTok's advertising options are relatively affordable, making it a cost-effective way for brands to reach a large and engaged audience.

> *"TikTok is een énorm efficiënt kanaal voor paid advertising. We bereiken er ook het grootste engagement meer. TikTok is klein, maar groeit snel. Ik merk dat heel veel merken de stap zetten naar TikTok en ruimer gezien naar videocontent. Dat zie je ook op Instagram. Tot voor kort deden we heel weinig met video. Vandaag nemen we enorme stappen met Instagram Reels en TikTok."*
> ***Nicky Blondé,*** *Beliving*

However, retail brands also struggle with the platform. As such, it is **challenging** for brands **to create content that resonates with their audience** and as with any new marketing channel, brands may be hesitant to invest in TikTok advertising without a clear **understanding of the platform's ROI** and how it fits into their overall marketing strategy.

> *"We worden eigenlijk internationaal gepusht om TikTok te gaan doen. Maar ik vind het moeilijk. Het is weinig serieus allemaal. Het moet altijd ludiek zijn. Wij zoeken naar rendement, het is nog zeer jong. […] We zijn minder actief op die kanalen waar de jongeren wat meer actief op zijn, ik denk dan vooral aan Snapchat en TikTok. Uiteraard ook omdat je daar mensen voor moet hebben die daar continue mee bezig moeten zijn."*
> ***Kurt Steelandt,*** *Electrodepot*

A way for a brand to respond to TikTok without having to make too heavy time or financial investments is to **cooperate with content creators** on this platform.

> *"We merken dat TikTok ook heel belangrijk is voor jongeren, maar voorlopig zijn we nog niet klaar om echt een account te beheren. TikTok is zeer dynamisch en vergt veel videomateriaal dat heel kort en bondig moet zijn. Dat hebben we nog niet, dus we zijn nu aan testen met een micro-influencer op TikTok."*
> ***Louis Bar,*** *Brico*

> *"Waar we dit jaar op willen focussen is de launch van een TikTok platform. Daar is de grote challenge voor ons de workload. Daarom hebben we eigenlijk beslist, maar dat is misschien al een stap verder, om de content vooral ook te laten maken via de ambassadors in de plaats van zelf content te gaan maken. Vooral budgetwise maar ook workloadwise is dat een moeilijke, maar we willen wel met dat platform starten want je kan niet meer anders als merk. Voor dit jaar hebben we de keuze gemaakt om verder te gaan met de ambassadors die we hebben, waar we tevreden van waren en goede resultaten mee haalden en die dan per land aan te vullen met een tweetal TikTok ambassadors die voor ons content gaan maken specifiek voor TikTok."*
> ***Veerle De Taeye,*** *Casa*

SOCIAL MEDIA CUSTOMER SERVICE

Retail brands acknowledge the importance of **tracking conversations** about their brand and **being accessible** to customers. Many also invest in **customer service** via social media.

> *"Customer service via sociale media doen we sowieso. We proberen binnen de twee uur te antwoorden en zetten hier heel erg op in. De verwachtingen van de consument zijn op dat vlak ook alleen maar groter geworden, ze verwachten een antwoord binnen een aanvaardbare tijdsperiode. Ook reviews, bijvoorbeeld op Google, vinden we erg belangrijk om op te volgen. We proberen hier ook op te reageren en mensen die een negatieve review achterlaten te contacteren om te begrijpen waar hun ervaring is misgelopen en hoe we dat in het vervolg kunnen vermijden."*
> ***Melissa Boeykens,*** *Nespresso*
>
> *"Het is een ambitie - ik ga het zo zeggen - om echt meer in interactie te gaan met de mensen die ons volgen enerzijds, maar ook om bepaalde groepen meer in de gaten te gaan houden, ons daarin te mengen en dit op te volgen: wordt daar over ons gesproken? Zijn er topics waarop wij kunnen inpikken als boekhandel om onze kennis en expertise in te delen? Maar het is echt nog een ambitie op dit moment. Er is op dit moment weinig ruimte in de verschillende takenpakketten om daar heel erg op te werken. Ik kan dus niet zeggen dat we daar op dit moment pionier in zijn, absoluut niet. Maar we beseffen wel dat dat een manier zou kunnen zijn om dat engagement nog meer uit te spelen. We weten dat het nodig is en willen het zeker doen, maar het is het eerste wat er op dit moment vaak bij inschiet als er tijdstekort is in de dagelijkse werking. Dat is sowieso jammer, maar we proberen er wel zoveel als mogelijk op te werken."*
> ***Eline Van Daele,*** *Standaard Boekhandel*

FOR YOUNG PEOPLE, MARKETING IS INHERENTLY PART OF SOCIAL MEDIA

In 2023 youngsters can still find branded communication irritating, but it's 100% part of their social media experience. Compared to previous years it appears branded communication is more accepted. We believe the higher awareness of the algorithms (instigated by the ForYou TikTok offer?) might play a role here. The content is also considered as more relevant compared to a few years ago when we started talking to youngsters.

"SOMS MAAKT HET MIJ WEINIG UIT, MAAR SOMS HEB IK HET GEVOEL DAT IK OVERSPOELD WORD. VANAF DAT IK EROP LET HOEVEEL RECLAME ER IS BEGIN IK EEN GEVOEL VAN IDENTITEIT TE VERLIEZEN. AL BIJ AL ZOU IK HET NIET ERG VINDEN MOCHTEN ER STRENGERE REGELS KOMEN."
MAN, 21 Y.O.

"IK VIND DAT WEL INTERESSANT WANT MEESTAL IS HET ECHT AANSLUITEND BIJ MIJN INTERESSES OF WAAR IK NAAR OP ZOEK BEN. HET ZIJN OOK VAAK MERKEN DIE IK NOG NIET KEN. TIJDENS YOUTUBE FILMPJES VIND IK HET AMBETANT OMDAT HET VAAK DEZELFDE EN HEEL ALGEMENE DINGEN ZIJN EN DAT WIL IK OOK NIET MIDDEN EEN FILMPJE DAT IK KIJK."
WOMAN, 24 Y.O.

"PARFOIS C EST EXAGÉRÉ MAIS PARFOIS C'EST ASSEZ BIEN INTÉGRÉ À LA VIDÉO ET N'INFLUE PAS SUR LA QUALITÉ DU CONTENU."
MAN, 17 Y.O.

Influencer Marketing

KEY INSIGHTS:

- Among 16-24 year-olds, 91,9% follows influencers, content creators and/ or famous persons on social media. Among +25 year-olds, this percentage is 75,8.
- Instagram is the most popular channel to follow influencers, followed by TikTok and YouTube. Despite the lower number of Twitch users, frequent users often come into contact with influencers on this channel.
- Influencer marketing remains effective. Of the Belgians from 16 to 39 years who follow influencers, content creators or famous persons, 28,2% indicated that they have bought a product or service, 33,1% indicated that they started following a brand and 41,4% indicated they looked up more information about a brand, due to an influencer in the past three months. Their impact is even higher among youth.
- Content creators are perceived differently (less commercial) than influencers, nevertheless they have equal commercial potential.
- Influencers and content creators have an important impact on lifestyle. Striking is their increased impact on health-related behavior, in particular among youngsters.
- 16,8% of the Belgian youngsters claims to follow virtual influencers (e.g. LilMiquela), 64,7% follows famous people (e.g. celebrities, athletes, artists) and 48,7% explicitly states to follow content creators. Among 25+ year-olds, percentages are respectively 22,3%, 50,6% and 34,1%.

INFLUENCER MARKETING REMAINS EFFECTIVE

Influencers have an important **commercial impact**, in particular on youngsters. While the percentage of young people following influencers seems to have dropped (84,1% vs. 86,6% last year), we get a different picture when we calculate the percentage of youngsters following influencers, content creators or celebrities, which is 91,9%. Among 25+ year-olds, 75,8% follows influencers, content creators and/ or famous persons on social media (59% follows influencers).
Youngsters who follow influencers, content creators or famous persons (91,9%), are convinced it's a good idea for brands to involve influencers for commercial purposes (68,8%). However, the percentage of youngsters who agree with this statement decreased with 5% compared to last year (74%). Among 25+ year-olds, this percentage is 55,9%. Also, **it appears that French-speaking Belgians are more open to influencer marketing than Dutch-speaking Belgians**, both among youngsters as among +25 year-olds. 73,1% (-2,8% compared to last year) of the French-speaking youngsters and 59,3% of the +25 year-olds believe this is a good idea compared to respectively 65,5% (-7,4% compared to last year) and 53% among the Dutch-speaking population (all ages Dutch-speaking = 57,8%; French-speaking = 64%). Furthermore, males tend to be more positive compared to females. 71,4% of the male youngsters and 59,6% of the male +25 year-olds believe influencer marketing is a good idea, compared to respectively 66,1% and 52,3% among females (all ages males = 63,8%; females = 57,1%). All reported differences are at least significant at the .05 level.

Influencer marketing is an effective marketing strategy to target Belgians (up to 39 years). Of the people who follow influencers, content creators or famous persons, 28,2% indicated that they have bought a product or service, 33,1% indicated that they started following a brand and 41,4% indicated they looked up more information about a brand, due to an influencer in the past three months.

Thus, **collaboration with influencers still pays off for brands, but their impact among youngsters seems to have slightly decreased compared to last year**. 30,1% of the young people who follow influencers, content creators or famous persons indicated that they have bought a product or service, 36,9% indicated that they started following a brand and 46,2% indicated they looked up more information about a brand, due to an influencer in the past three months. Figure 18 provides an overview and evolution of these percentages based on the number of youngsters that follow at least one influencer.

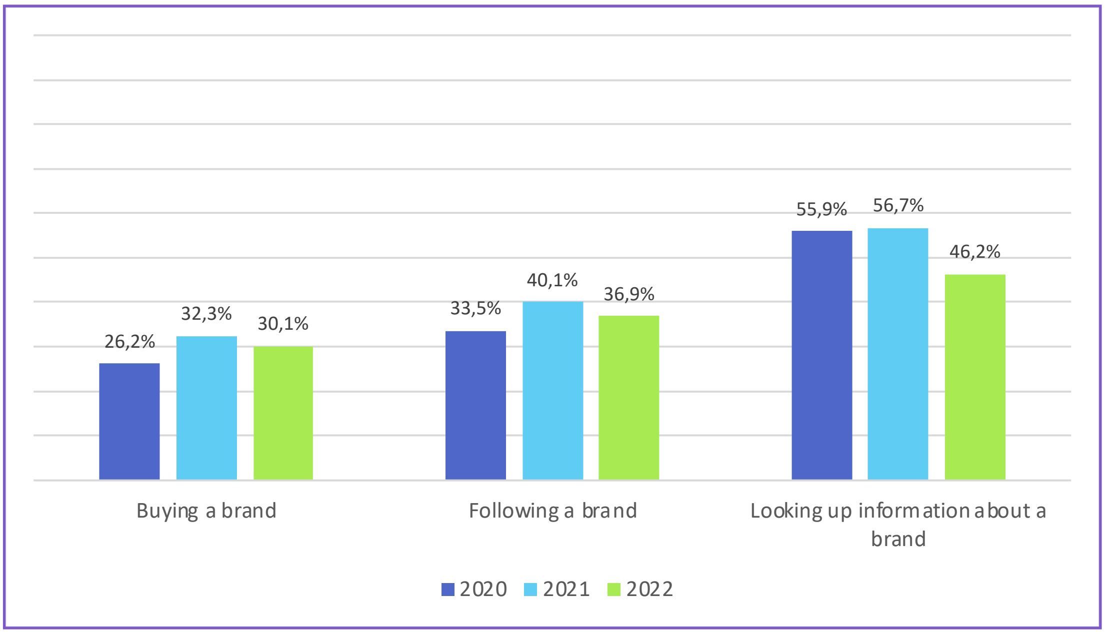

Figure 18 Influencer marketing and conversion among youngsters 2020 - 2022 (calculated among youngsters who follow influencers, content creators and/ or celebrities)

Among 25+ year-olds, 27,2% of the people who follow influencers, content creators and/ or famous persons indicated that they have bought a product or service, 30,9% indicated that they started following a brand and 38,7% indicated they looked up more information about a brand, due to an influencer in the past three months.

The **impact of influencer marketing is higher among French-speaking compared to Dutch-speaking Belgians**. Furthermore, it seems that the decreased impact of influencer marketing is mostly evident among Dutch-speaking young people rather than French-speakers. The following table provides more details:

	16-24		25-39		All ages	
	Dutch	French	Dutch	French	Dutch	French
Buying a brand	24,1% (-6,7%)	38,6% (+4,1%)	23,8%	31,4%	23,9%	33,8%
Following a brand	30,6% (-6,9%)	45,8% (+1,4%)	26,6%	36,1%	28,1%	39,4%
Looking up information about a brand	41,1% (-15,5%)	53,5% (-3%)	34,6%	43,5%	37,1%	46,9%

Table 5 Impact of influencer marketing – comparison language groups

Among the older age group only, influencer marketing has more impact on males compared to females (no significant differences within the younger age group). Hence, influencer marketing is not necessarily a female story. 15,6% of 16-24 year-olds and 14,6% of +25 year-olds (14,9% all ages) sometimes clicks through to a brand's webshop via a link that an influencer, content creator, famous person,... shares. 12,4% of 16-24 year-olds and 12.6% of +25 year-olds (12,5% all ages) sometimes clicks through to a brand's webshop via products that are tagged in the posts or stories of an influencer, content creator, famous person,...

”JE TROUVE QUE C'EST NORMAL DONC ÇA NE ME DÉRANGE PAS TANT QU'ILS (= LES INFLUENCEURS) SONT HONNÊTES AVEC CE QU'ILS VENDENT (PRÉCISE QUE C'EST UN PARTENARIAT, QUALITÉ DU PRODUIT, ...)”
MAN, 18 Y.O.

68,8% of the young Belgians finds **transparency** on commercial deals between influencers and brands important to very important. This percentage is similar for 16-24 year-olds and +25 year-olds. For youngsters, this percentage is similar to last year. Hence, the changes in regulation on the disclosure of influencer marketing since May 2022[2] , has not affected their perceptions on the importance of transparency. There are no remarkable differences between males and females or different language groups. It appears that influencer marketing is an everyday reality to youngsters.

2 *https://news.economie.fgov.be/213090-contentcreators-moeten-reclame-duidelijk-kenbaar-maken*

INFLUENCER MARKETING HAS BECOME A WELL-ESTABLISHED STRATEGY AMONG BRANDS

Influencer marketing has become a **well-established strategy** among brands in recent years. With the rise of social media platforms, influencer marketing has emerged as an effective way for brands to reach their target audience and build brand awareness. Many of the retailers we spoke to are leveraging the power of influencers to promote their products and services.

More than ever, brands are recognizing the importance of **collaborating with the right influencers** who align with the brand's values and messaging to achieve the desired results. This also remains the most important challenge for brands. Also the **multilingualism** in Belgium is considered a challenge when it comes to finding appropriate influencers.

> *"Het is moeilijk om een goede match te vinden. En je moet er meteen ook twee gaan zoeken (een Nederlandstalige en een Franstalige), want er is geen enkele influencer die heel België covered."*
> ***Kurt Steelandt,*** *Electrodepot*

> *"Het is soms een uitdaging om Franstalige influencers te vinden, die ook dan nog eens passen bij het merk. Ik heb het idee dat er een stuk meer Vlaamse influencers actief zijn. Ik denk dat er zeker wel interessante Franstalige influencers zijn, maar die richten zich daarom niet alleen op Wallonië."*
> ***Nicky Ruisch,*** *The Body Shop*

Some brands cooperate with specialized agencies or use specific technology to connect with content creators and manage influencer relations. Preference is also given to **long-term ambassadorship** rather than one-off collaborations with a large pool of influencers.

> *"Vorig jaar hebben we de eerste projecten met influencers gedaan, maar daar komen we dit jaar een beetje op terug. We willen nog altijd werken met influencers, maar we willen meer gaan richting een ambassadeursprogramma. Wij willen met merkambassadeurs werken. Dat is een beperktere groep, een selectievere groep, maar met een hogere betrokkenheid."*
> ***Nicky Blondé,*** *Beliving*

> *"Vorig jaar hebben we ons ambassadorsprogramma opgestart, waardoor we nu goed weten welke ambassadors voor ons iets extra doen en dus echte ambassadors zijn en welke enkel doen wat we vragen. Op basis daarvan hebben we ook een selectie van dedicated ambassadors gemaakt voor dit jaar. […] We proberen er een echte club van te maken, met een kick-off event waarbij ze ook elkaar leren kennen. Het was bijvoorbeeld ook tof om te zien dat ze onmiddellijk een clubje aanmaakten via Whatsapp en dat ze elkaar ook stimuleerden om voor ons dingen te gaan doen. Dat is fijn. Voor de rest is dat relationship building, hen eens opbellen of met hun verjaardag een cadeautje sturen. We proberen die relatie echt op te bouwen zodat ze een band voelen met Casa en dat het niet enkel een programma is dat zegt wat ze moeten doen. We willen ook een vertrouwensband opbouwen. We geven hen wel een briefing met verwachtingen (de periode waarin ze moeten posten, de tags die ze moeten opnemen,…) maar gaan vooraf niet controleren wat ze doen want dat is het niet natuurlijk en authentiek."*
> ***Veerle De Taeye,*** *Casa*

Tracking the results of an influencer campaign is essential for brands to measure the success of their marketing efforts and understand the ROI of their influencer partnerships. Brands can track engagement metrics such as likes, comments, shares, and clicks on influencer content to understand how their target audience is interacting with the brand message. This information can help brands gauge the effectiveness of the influencer campaign.

> *"We kijken vooral naar: hoeveel impressies een post heeft opgeleverd, hoeveel engagement, welke target group heeft het vooral bereikt? Dus daar gaan we eigenlijk op een aantal KPI's*

per campagne kijken wat dat eigenlijk heeft opgeleverd. Vooral het engagement is ook een belangrijke. Je hebt er veel die veel volgers hebben, maar weinig engagement. Wat wij belangrijker vinden, is dat ze misschien minder volgers hebben, maar meer engagement want dat is vaak authentieker. En dat het echte volgers zijn die volgen omdat ze de content goed vinden en geen fake volgers."
Veerle De Taeye, *Casa*

Furthermore, some brands mentioned that they provide influencers with **unique tracking links** to track conversions and sales directly attributed to the influencer's content or work with **joint posts**.

"Wij leveren UTM-links aan, zodat we kunnen tracken: wat gebeurt er als er via die post naar onze webshop gegaan wordt?"
Eline Van Daele, *Standaard Boekhandel*

"Een nieuwe feature die het ons makkelijker maakt om de draagkracht en impact van ambassadors en influencers te meten zijn de joint posts. Daar kan je het bereik enorm goed mee opvolgen en meten. We doen ook vaak give-aways waardoor we data kunnen capteren en kunnen nagaan of die ambassador zijn of haar doelgroep engageert. Ook de tracking links gebruiken we om de ambassador te laten doorverwijzen naar onze website. Dan kijken we naar de traffic van de redirects om te zien hoe de ambassador scoort."
Nicky Blondé, *Beliving*

Brands are very aware of the importance of **authentic content** in influencer marketing. While exclusivity is still considered very important by many brands, for some it no longer outweighs authenticity.

"Ik vind exclusiviteitscontracten niet meer van deze tijd, eerlijk gezegd. Aan de ene kant snap ik het, aan de andere kant is het ook heel natuurlijk als een influencer meerdere producten gebruikt van andere merken en je dat ook terugziet in hun content. Ik vind het niet natuurlijk en authentiek als een influencer steeds alleen maar hetzelfde skincare merk laat zien. Het is natuurlijk goed om te herhalen, maar persoonlijk geloof ik niet zo in exclusiviteit." ***Nicky Ruisch,*** *The Body Shop*

"Wij delen ook foto's van klanten die ons taggen en waar daarnaast een meubel van IKEA op staat. Dat is geen probleem. Niemand is verplicht om alles bij WEBA te kopen. Het is zelfs mooi als je dingen kunt combineren van verschillende winkels. Die meubels complementeren elkaar. Maar je kunt niet de ene dag zeggen: "WEBA is de max."en de andere dag weer direct voor een ander te springen en promoten. Het is wel de bedoeling dat je ziet: dat is iemand die WEBA regelmatig aanprijst."
Francis Huysman, *WEBA*

Finally, we also found in the interviews that influencers are **valued for their content creation skills** and really hire them as creative content producers, especially now that video is becoming increasingly important.

"Wij proberen zo veel mogelijk content te laten maken door influencers, waar we dan buy-out rates van kopen zodat wij ook die content kunnen inzetten. Zo is er bepaalde content die influencers zelf gaan pushen, maar ook content die dan exclusief voor ons is en die wij vanuit Nespresso pushen. Daar proberen we nu heel hard op in te zetten. Een uitdaging daarbij is het vinden van een evenwicht tussen de vrijheid van de content creator en het vastleggen van guidelines vanuit het merk. Nespresso is vanuit haar merkidentiteit ook een heel modern, innovatief merk maar toont eigenlijk heel weinig gezichten. Voor ons zijn influencers dan een manier om toch een gezicht te tonen en op die manier dichter bij de consument te komen. We zijn er ook van overtuigd dat influencers rolmodellen zijn waar mensen naar opkijken en dat ze authentiek overkomen. Bovendien past die strategie ook binnen het hele proces van verjongen als merk."
Melissa Boeykens, *Nespresso*

INFLUENCERS VS. CONTENT CREATORS, WHAT'S DIFFERENT?

The meaning assigned to influencers has been subject to change in recent years. To gain a better understanding of what meanings are assigned to influencers, content creators and famous persons (e.g. celebrities, artists, athletes) on social media, we asked participants to select a number of characteristics of their choice that they consider typical of each group of social media personalities they follow. The characteristics were the following: has many followers; is credible, reliable; is a role model, someone I look up to; is attractive; advertises, is sponsored by brands; reacts to comments, messages; is creative; posts fun, original content; posts content of professional quality; has a special talent, excels at something; shows how he/she really is (doesn't act, is not fake); shows an ideal image of what life could be like; resembles me.

It is striking from our analysis that young people and +25 year-olds assign different characteristics to different social media personalities. A content creator is sometimes seen as a rebrand for influencer. But there is more to it than meets the eye. Hence, having many followers is to a lesser extent considered a typical trait for content creators, while creativity and posting fun, original content that inspires followers is paramount for the latter. For celebrities, next to having a lot of followers, being a role model, someone followers look up to is also an important trait. To have a special talent, excel at something was also deemed important (third most prominent characteristic among youngsters and fourth most prominent characteristic among +25 year-olds).

"CONTENT CREATORS MAKEN DINGEN AMUSANTE DINGEN VAAK MET EEN DOEL VOOR ZICHZELF. INFLUENCERS BEÏNVLOEDEN JE VAAK OM DINGEN TE KOPEN OF DINGEN TE DOEN EN DOEN SPONSERDEALS ENZO. BEROEMDHEDEN ZIJN GEWOON WIE ZE ZIJN EN ZIJN BEKEND GEWORDEN DOOR IETS."
WOMAN, 23 YEARS

"(REFERRING TO AN INFLUENCER) UNE PERSONNE QUI ATTIRE PEUT-ÊTRE LES GENS ET QUI UTILISE CETTE FACULTÉ AFIN DE DIVERTIR, DE CRÉER DES CONCEPTS ET D'ENGRANGER DE L'ARGENT VIA DES VUES, DES LIKES, DES ABONNEMENTS OU ENCORE DES PLACEMENTS DE PRODUITS. EH BIEN LES CRÉATEURS DE CONTENU SONT PLUTÔT SUR YOUTUBE ET LES INFLUENCEURS PLUTÔT SUR INSTA ET TIK TOK JE PENSE."
MAN, 16 Y.O.

"INFLUENCERS ZIJN WANDELENDE RECLAMEBORDEN. IK VERONDERSTEL DAT ZE BEKEND ZIJN GEWORDEN DOOR IETS OP HET INTERNET, BEKENDHEID HEBBEN GEKREGEN EN DAN BERICHTEN BLIJVEN MAKEN OM IETS TE PROMOTEN. CONTENT CREATORS ZIJN MENSEN DIE CONTENT MAKEN OP HET INTERNET, IK GELOOF OM EEN INTRINSIEKE REDEN. (ZOALS INTERESSE IN HETGEEN DAT ZE DOEN ED.) AL DAN NIET GESPONSORD. CELEBRITIES ZIJN 90% VAN DE TIJD MENSEN DIE WERKEN, ZOALS ACTEURS OF MUZIKANTEN DIE VAN HUN HOBBY HUN JOB HEBBEN GEMAAKT EN ZO BEKEND ZIJN GEWORDEN. VOOR MIJ SLUIT HET ENE HET ANDERE OOK NIET DIRECT UIT."
MAN, 20 Y.O.

"(REFERRING TO INFLUENCERS) DES GENS AVEC UNE CERTAINE NOTORIÉTÉ SUR LES RÉSEAUX SOCIAUX ET QUI POSTENT DU CONTENU POUR LEUR COMMUNAUTÉ. UN CRÉATEUR DE CONTENU N'A PAS FORCÉMENT DE COMMUNAUTÉ QUI LE SUIT IL PEUT PAR EXEMPLE IL Y AVOIR DES JEUNES TIKTOKEURS AVEC TRÈS PEU D'ABONNÉS QUI SONT DONC DES CRÉATEURS DE CONTENU MAIS PAS DES INFLUENCEURS. LA DIFFÉRENCE C'EST DONC LA NOTORIÉTÉ."
MAN, 16 Y.O.

"INFLUENCERS ZIJN FIGUREN DIE VAAK IN DE MEDIA IN'T ALGEMEEN VERSCHIJNEN EN DIE VOORAL VEEL PRODUCTEN/VAKANTIEBESTEMMINGEN/EVENTS/ACTIVITEITEN/… PROMOTEN EN VAAK VLOGGEN ZIJ OOK VOORAL. CONTENT CREATORS IS ER EEN DUNNE LIJN MET INFLUENCERS, ALLEEN DOEN ZIJ MINDER AAN DAT PROMOTEN (AL KOMT DAT WEL VOOR, DIT LIJKT ALLEEN NIET DE BASIS VOOR HUN ACCOUNT, JE ZOU ZELFS DOM ZIJN ALS JE NIET TEGEN BETALING POSTS MAAKT VAN BEPAALDE ZAKEN). CONTENT CREATORS HEBBEN EEN MEER "EIGEN ACCOUNT"DAT VAAK WAT UNIEK IS EN DOEN HIER BEPAALDE DINGEN OP. BEKENDE PERSONEN KUNNEN DAN WEER INFLUENCER OF CONTENT CREATOR ZIJN OP SOCIALE MEDIA MAAR DIT HOEFT NIET EN IS IN MIJN OGEN OOK VAAK NIET HET GEVAL, ZE LIJKEN ME VOORAL DINGEN TE POSTEN VAN HUN WERK EN HIER EN DAAR ADVERTEREN ZE WEL IETS (WEDEROM: JE ZOU DOM ZIJN ALS GE DIE OPTIE KRIJGT EN DAT AFSLAAT) MAAR HET GAAT VAKER VOORAL OM HEN ALS PERSOON OM DICHTER BIJ HUN FANS TE KOMEN OFZO."
WOMAN, 19 Y.O.

"UN CRÉATEUR DE CONTENU QUI PARTAGE CES PROJETS, UNE PARTIE DE SA VIE PRIVÉE ET QUI CRÉE. JE N'AIME PAS LE TERME INFLUENCEUR. INFLUENCEUR C'EST PLUS ASSOCIÉ AUX PERSONNES QUI FONT DES PLACEMENTS DE PRODUITS NON-STOP. JE NE L'UTILISE PAS PCQ C'EST N'EST PAS LE GENRE DE PERSONNE QUE JE SUIS."
MAN, 17 Y.O.

"DE MEESTE INFLUENCERS DIE IK TEGENKOM ZITTEN VAAK ALLEEN HUN DAGELIJKS LEVEN TE DELEN IN COMBINATIE MET HET ADVERTEREN VAN EEN BEPAALD PRODUCT. NIET OM PRETENTIEUS TE KLINKEN MAAR IK KIJK LIEVER NAAR IETS MET EEN BEETJE MEER INHOUD. WAT MISSCHIEN WEL VERGELIJKBAAR KAN ZIJN IS DAT SOMMIGE CONTENT CREATORS EEN BEPAALD PRODUCT/DIENST ADVERTEREN OMDAT ZE HUN WERK SPONSEREN. ZE STARTEN OF ONDERBREKEN HUN VIDEO DAN MET DEZE BOODSCHAP. MEESTAL IS HET OOK IETS DAT TE MAKEN HEEFT MET DE CONTENT DIE ZE CREËREN. WAT OOK VOLKOMEN BEGRIJPELIJK IS. MEESTAL IS DAT OOK DE ENIGE MANIER WAAROP ZE VAN HUN CONTENT HUN WERK KUNNEN MAKEN. BIJ DE CONTENT CREATORS DIE IK NET HEB VERMELD LEER IK NOG IETS OVER WAT MIJ INTERESSEERT."
MAN, 24 Y.O.

"JE DIRAIS QUE LES CRÉATEURS DE CONTENU SONT JUSTE LÀ POUR NOUS FAIRE PASSER UN BON MOMENT, SANS FORCÉMENT PROMOUVOIR UNE MARQUE OU UN PRODUIT. LES CRÉATEURS DE CONTENU EN FONT JUSTE POUR LEUR PLAISIR."
MAN, 17 Y.O.

Looking into the different associations 16-24 year-olds and 25-39 year-olds assign to influencers, celebrities and content creators, two things stand out: young people have more commercial connotations with influencers, while the +25-year-olds indicate 'credibility' as an important characteristic of both influencers and celebrities.

"POUR MOI, UN INFLUENCEUR EST UNE PERSONNE PAYÉE POUR SE FAIRE AIMER SUR LES ÉCRANS. UNE PERSONNE QUI FAIT CE QUE LE PUBLIC VEUT, QUI ESSAYE D'INNOVER POUR SE FAIRE REMARQUER PARMI D'AUTRES. QUI EST PLUS AU MOINS SINCÈRE CAR C'EST CE QUE LES GENS RECHERCHENT DE NOS JOURS. UNE PERSONNE QUI N'A PAS PEUR DU RIDICULE POUR ATTIRER SON PUBLIC."
WOMAN, 17 Y.O.

"POUR MOI UN INFLUENCEUR C'EST QUELQU'UN QUI A FAIT DES RÉSEAUX SOCIAUX SON MÉTIER EN POSTANT ÉNORMÉMENT DE CONTENU SOUS TOUTES LES FORMES. …ELQU'UN QUI PROMEUT AUSSI DES MARQUES ET QUI NOUS MONTRE SA VIE ET LUI TEL QU'IL EST. OU ELLE BIEN SÛR."
WOMAN, 16 Y.O.

The figure below indicates the top 3 most selected characteristics per type of social media personality, per age group.

	16 -24			25 - 39		
	Influencer	**Celebrity**	**Content Creator**	**Influencer**	**Celebrity**	**Content Creator**
1	Has many followers	Has many followers	Posts fun, original content	Has many followers	Has many followers	Is creative
2	Posts fun, original content	Is a role model, someone I look up to	Is creative	Is credible, reliable	Is a role model, someone I look up to	Can teach me something
3	Sponsored by brands	Has a special talent, excels at something	Can teach me something	Can teach me something	Is credible, reliable	Posts fun, original content

Table 6 Associations linked with influencers, celebrities and content creators – comparison age groups

The qualitative research confirms the **fun factor** of content creators and their focus on **creating high-quality content**, while they have the idea that **promotional messages are inherently part of influencers**' content as they are more focused on making money. Influencers have more commercial connotations as they often partner with brands to promote products or services to their followers. However, both have the ability to influence the opinions, behaviors, and purchasing decisions of their followers. It appears that youngsters are less skeptical about content creators' authenticity and the motivations behind their endorsements, compared to influencers. Also it appeared that influencers were mainly linked with Instagram, while content creators are dedicated to creating high-quality content to share with their audience on different platforms.

INFLUENCERS SHAPE OUR OPINIONS AND BEHAVIOUR

Influencers not only have an important commercial impact, they also impact our lives in a broader sense, in particular among youngsters and in particular when it comes to health-related behavior. The following table provides an insight into the activities and/or behaviour to which an influencer, celebrity or content creator has already encouraged young people and +25 year-olds. For 16-24 year-olds, we also included the evolution compared to last year. The higher impact of influencers on health-related behaviour compared to last year stands out here.

"POUR MOI LES CRÉATEURS DE CONTENU SONT LES YOUTUBEURS OU LES STREAMERS. ET LES INFLUENCEURS SONT CEUX QUI SONT PLUTÔT ACTIFS SUR INSTAGRAM. MAIS ON PEUT ÊTRE LES 2 À LA FOIS."
MAN, 17 Y.O.

	16-24	25-39
Dress differently	20,7% (-3,2%)	10,7%
Game	16,2% (+2,5%)	11,9%
Invest	12,8% (- 1,9%)	11,3%
Start a new hobby	10,5% (+0,9%)	7,7%
Exercise more	36,7% (+11,9%)	23,9%
Eat more healthy	28,3% (+4,7%)	23,9%
Pay attention to mental wellbeing	14,9%(-0,9%)	9,2%
Seek psychological help	7,8% (+1,1%)	7%

Table 7 Has an influencer, celebrity or content creator ever motivated you to… (in % of people who follow influencers)

Podcasts

KEY INSIGHTS:

- Half of the Belgians up, to 39 listens to podcasts.
- Podcasts are a promising a platform of brands, although retailers remain hesitant. In particular cooperating with podcasters as content creators may be a promising strategy for brands.
- Podcasts may have an impact on our lifestyle. In particular, listeners find support in podcasts to improve their health.

PODCASTS REMAIN A PROMISING PLATFORM FOR BRANDS

53.5% of the Belgians up to 39, listens to podcasts (16-24: 51,3% (-4,2%); 25-39: 54,8%). Youngsters listen less often to podcasts compared to +25 year-olds. Males listen more often to podcasts, compared to females. Also, French-speaking Belgians are more frequent podcast listeners compared to Dutch-speaking Belgians.

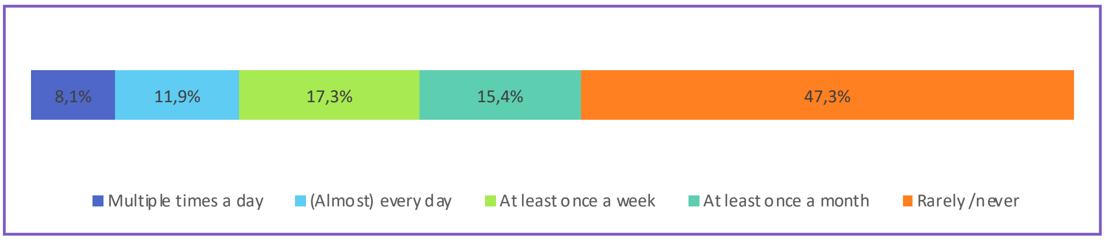

Figure 19 How often do Belgians up to 39 listen to podcasts? (in %)

Of the Belgians who listen to podcasts, 26,3% believes it's a good idea for brands to cooperate with existing podcasts and 33,1% believes it's a good idea for brands to create their own podcast. 27,1% explicitly states it's not a good idea for brands to incorporate podcasting as a branding strategy, while 15,5% is not sure on this matter.

Based on our interviews with youngsters, branded communication in podcasts is accepted if noticed. Compared to ads on social media, branded communication in podcasts is considered less striking and less disturbing. Besides the fact that youngsters indicate they don't hear ads that often (partly due to Spotify Premium subscriptions), the **higher acceptance** appears to be related to a good match between the brand, the advertising message and the podcast content. Furthermore, youngsters perceive branded communication as sponsorship and thus a manner for podcasters to monetize their content creation efforts, instead of advertising that arises from podcasters' commercial motives.

“HIER STA IK NIET ACTIEF BIJ STIL. IK WEET DAT ‘PODCAST X’ WEL BEPAALDE SPONSORINGEN AANKONDIGT. MAAR BIJ DE ANDERE ‘PODCAST’ DIE IK SINDS KORT LUISTER, WORDT ER INDERDAAD VRIJ VEEL RONDGEGOOID MET MERKEN, ZOALS VOGUE EN ROLLING STONE ED. STOORT ME NIET ALS HET EFFECTIEF MET HET ONDERWERP TE MAKEN HEEFT. HEB ER NOG NOOIT EEN KORTINGSCODE GEBRUIKT, MAAR DIT GEEFT HUN KLEINE BONUS DUS VIND IK PERFECT VOOR HUN.”
MAN, 20 Y.O.

“ENKEL BIJ ‘PODCAST X’… OFWEL RECLAME VOOR ANDERE PODCASTS OFWEL RECLAME VAN HELLOFRESH EN EMMA MATRAS. GEEN IRRITANTE RECLAME WANT HET IS ALTIJD WEL VOOR EEN GOED IETS. DIE RECLAMES ZIJN ALTIJD KORTINGSCODES. IK SNAP HET, WANT ZIJ ZIJN EEN KLEINE PODCAST DUS NIET VAN EEN GROTE ZENDER EN DIE KUNNEN DUS WEL HULP GEBRUIKEN.”
WOMAN, 23 Y.O.

It appears that podcasts are gradually being used as a branding strategy, as only 25,2% of the people who regularly listen to podcasts rarely or never gets in touch with brands through podcasts. The figure below provides some more detailed information on how often people get in touch with brands through podcasts (calculated among people who listen to podcasts). Branding through podcasts also appears to be effective in terms of conversion, as 32,4% of the people who listen to podcasts looked for more information about a brand due to a podcast and 26,6% admits to have bought a product or service due to a podcast in the past three months.

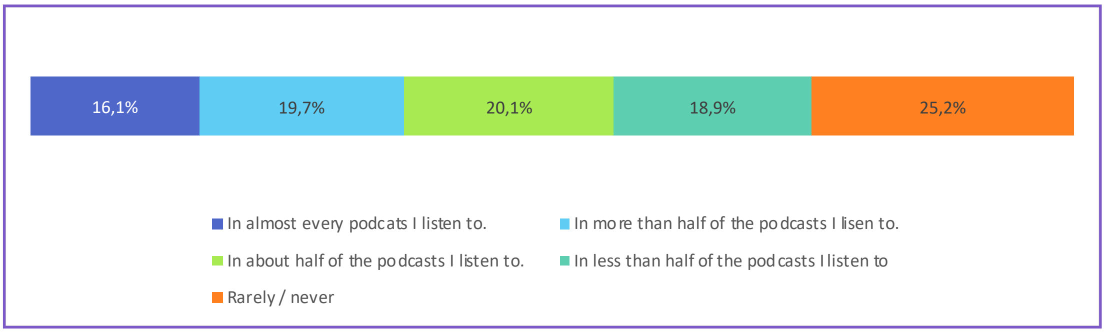

Figure 20 How often do Belgian podcast listeners up to 39 get in touch with brands through podcasts?

The continued growth of podcast listening without signs of stagnation, has caught the attention of brands wondering how to capitalize on this trend. Generally, brands have two main options: they can either produce their own branded podcast or they can sponsor a podcast. While the first option requires great investments and is only relevant for a few brands, the second option is easier to implement and promising in terms of engagement. However, **brands remain hesitant** as the return on investment for is unclear due to the novelty of the strategy, in particular when it comes to producing a branded podcast.

"Een podcastproductie moet handenvol geld kosten en is op dit moment te niche voor ons als retailer. Wat is de toegevoegde waarde? Waarom zou een consument naar jouw podcast luisteren, en niet naar de podcast van een neutralere partij? Waarom zou hij naar de podcast van een retailer luisteren? Ik vraag mij dat wel af."
Thomas Vaarten, *Beliving*

"We hebben het wel besproken, maar dat doen we niet. Dat vergt veel tijd, veel geld en we zijn niet zeker dat het interessant is. We denken dat visueel voor ons, dus DIY, beter werkt dan podcast."
Louis Bar, *Brico*

"Qua bereik zit je natuurlijk wel wat lager dan bijvoorbeeld Instagram, TikTok of YouTube. Maar het is toch ook wel interessant. Het is gewoon een heel nieuw kanaal waarvan ik zeker denk dat er nog meer ontwikkeling in zit. Dat houden wij zeker in de gaten."
Nicky Ruisch, *The Body Shop*

PODCASTS MAY SERVE AS A SOURCE OF INSPIRATION AND MOTIVATION

7.6% of the Belgian podcast listeners says a podcast already motivated them to dress differently. Sometimes, podcasts may motivate people to game (9,3%), to invest (15,5%) or more general to start a new hobby (8,6%).

Listeners may find support in podcasts to improve their health. More specific, 27,6% of the Belgian podcast listeners up to 39, says they started exercising more often due to a podcast and 27,2% was inspired to eat healthier. As for mental health, 12,5% of the listeners was motivated by a podcast to pay more attention to their mental health, such that they would feel better about themselves and 11,3% was inspired to seek psychological help.

	16-24	25-39
Dress differently	7,2% (-0,5%)	7,8%
Game	7% (-3,4%)	10,5%
Invest	13,3% (- 0,1%)	16,7%
Start a new hobby	8,4% (-2,4%)	8,8%
Exercise more	23,5% (-0,8%)	28,2%
Eat more healthy	26,4% (+3,7%)	29,1%
Pay attention to mental wellbeing	12,6%(-6,9%)	12,4%
Seek psychological help	11,4% (+2,3%)	11,2%

Table 8 Has a podcast ever motivated you to… (in % of podcast listeners)

SPOTIFY AS A PLATFORM FOR PODCASTS, BUT EVEN MORE SO FOR PLAYLISTS

As Spotify is an important platform for podcasts, we gauged for how often Belgian youngsters use Spotify. It appears that about 66,9% of the Belgians up to 39 uses Spotify at least once a month (16-24: 79,7%; 25-39: 60%), and 45,7% on a daily basis (16-24: 63,7%; 25-39: 35.,9%). Among youngsters, the daily (+ 6,9%) and monthly use (+6,6%) has increased compared to last year.

Furthermore, we asked frequent Spotify users (at least once a week), how often they used Spotify playlists and Spotify podcasts. It appears that in particular playlists are used regularly. The podcast feature is used less frequently among both age groups. Based on qualitative research, it appears that Spotify has taken over an important role of YouTube over the years, i.e. listing to music.

	16-24		25-39		All ages	
	Playlists	Podcasts	Playlists	Podcasts	Playlists	Podcasts
Multiple times a day	63,2%	8,2%	36,4%	12,6%	48,2%	10,6%
(Almost) every day	20,1%	9,7%	29,5%	17,7%	25,4%	14,2%
At least once a week	10,7%	15,6%	23%	20,4%	17,6%	18,3%
At least once a month	2,7%	19,7%	7%	15,9%	5,1%	17,5%
Rarely / never	3,4%	46,8%	4,1%	33,4%	3,8%	39,3%

Table 9 Use of Spotify playlists and podcasts among Belgians up to 39

Retail Deep Dive: Insights by Retail Sector

RELEVANCE OF SOCIAL MEDIA AS BRANDING TOUCHPOINT IS HIGHLY IRRESPECTIVE OF RETAIL SECTOR

If engaged with a certain retail sector, social media is a **very important touchpoint to inspire** 16-39 y.o. Belgian social media users. For all retail sectors the % of 16-39 y.o. Belgian social media users claiming to look for inspiration is very high. Even for the sector (Optics) where people look the least for inspiration 2 out of 3 still claims to look for inspiration on their social media.

But it is not only about being inspired, social media is also relevant to generate purchase conversion.

If engaged with a specific sector, **claimed purchase (in app or click through to webshop) is high**. The top 5 retail sectors where people claim to have already purchased something via social media are Beauty, Baby, Fashion, Electronics and Interior.

For 16-39 y.o. social media users **willingness to contact a brand or company via social media is also high**. The minimum % of social media that would use social media to contact a brand or company within a certain sector is 51%. The 5 retail sectors where the use social media used is more obvious to communicate with brands or companies are Beauty, Fashion, Electronics, Health and Baby.

	Gain inspiration	**Buy products or service** (in app or click through to brand's webshop)	**Would use social media to contact brands or companies**
Fashion	90%	72%	74%
Health	81%	62%	68%
Beauty	92%	75%	75%
Electronics	86%	66%	72%
Interior	91%	63%	67%
DIY	90%	58%	64%
Garden	84%	54%	54%
Gaming	87%	53%	62%
Food	87%	49%	63%
Sports	86%	62%	65%
Culture	86%	49%	54%
Baby	86%	71%	68%
Optics	65%	44%	51%
Travel	83%	43%	58%

Table 10 % used at least 1 social media app when looking for inspiration, purchase of goods or services and willingness to contact brands or companies

MANY SOCIAL MEDIA FULFILL AN INSPIRATIONAL ROLE FOR RETAIL SECTORS

Some striking findings:

- **Instagram rules**: Instagram is very important when looking for inspiration.
- **Facebook is not dead**: It still plays a role in inspiring 16-39 y.o and Facebook is for all retail sectors among the 2 most important social media apps to yield sales or serves a potential communication channel .
- **YouTube** is more relevant for DIY, Electronics, Gaming, Sports & Culture. Especially for gaming, DIY, Electronics and Culture YouTube has a strong position.
- **TikTok** is used for all retail sectors, but for **Beauty & Fashion its relevance is higher**.
- **Twitch and Discord** are relevant apps for the **Gaming** sector (though YouTube remains the most important one!).
- **Don't forget Pinterest**: It's the app that used most often when looking for inspiration about Interior. Also, when taking into consi-deration the % of daily Pinterest users (17%), Pinterest succeeds to attract users that look for inspiration in retail sectors such as Baby, Fashion, Garden, Beauty and Food. Definite-ly a platform to consider in the mediamix of brands active in these sectors.

In table 11 we highlighted the social media apps that are used by at least 20% of the Belgian social media users when looking for inspiration (for a sector they feel involved with). The most important ones are Instagram, Facebook, YouTube, TikTok and Pinterest.

	Facebook	Instagram	TikTok	Snapchat	Twitter	YouTube	Pinterest	LinkedIn	Twitch	Discord	WhatsApp	Messenger	Other
Fashion	35%	64%	34%	12%	4%	17%	29%	1%	2%	2%	4%	3%	1%
Health	40%	40%	26%	9%	7%	27%	8%	3%	2%	1%	6%	4%	2%
Beauty	36%	62%	43%	17%	5%	29%	23%	2%	1%	1%	5%	4%	1%
Electronics	40%	33%	23%	9%	9%	48%	9%	3%	4%	4%	7%	5%	1%
Interior	28%	52%	24%	10%	6%	22%	53%	2%	1%	2%	3%	2%	0%
DIY	40%	36%	26%	6%	4%	49%	34%	2%	2%	3%	5%	3%	1%
Garden	44%	42%	25%	5%	4%	34%	24%	2%	1%	2%	4%	4%	1%
Gaming	27%	20%	25%	7%	8%	57%	4%	1%	27%	23%	5%	3%	1%
Food	49%	53%	25%	8%	4%	29%	19%	3%	2%	3%	5%	4%	1%
Sports	34%	61%	28%	8%	6%	38%	9%	2%	2%	2%	3%	3%	1%
Culture	37%	49%	27%	5%	11%	46%	18%	3%	3%	3%	5%	3%	4%
Baby	60%	45%	18%	7%	4%	21%	32%	2%	3%	2%	6%	7%	2%
Optics	42%	44%	16%	11%	8%	21%	22%	5%	3%	5%	9%	9%	2%
Travel	32%	62%	27%	5%	2%	29%	18%	0%	1%	1%	3%	2%	1%

Table 11 Social media app used to gain inspiration

INSTAGRAM AND FACEBOOK ARE ALSO THE MOST POWERFUL TO GENERATE PURCHASE CONVERSION

Instagram and Facebook are **not only inspirational apps, but also the most powerful to generate purchase conversion** (table 12) . Instagram is the most effective for people interested in Fashion and Beauty, while Facebook plays a more important role for people interested in the Baby retail sector (aligned with higher importance of Facebook with +25 y.o. Belgians). YouTube's inspirational role is higher compared to its buying power, though for Electronics, Gaming, Sports, Culture and DIY at least 15% of the 16-39 y.o. social media users indicates they already bought something following branded communication on YouTube.

TikTok is not as powerful for purchase yet, but for Beauty, Fashion, Health, Interior and Electronics it already plays an important role. Pinterest is especially important for Interior.

	Facebook	Instagram	TikTok	Snapchat	Twitter	YouTube	Pinterest	LinkedIn	Twitch	Discord	WhatsApp	Messenger	Other
Fashion	31%	47%	19%	10%	5%	10%	6%	3%	2%	2%	3%	4%	3%
Health	33%	33%	18%	10%	7%	14%	4%	2%	1%	2%	4%	4%	2%
Beauty	30%	42%	23%	15%	9%	13%	10%	3%	2%	3%	4%	3%	2%
Electronics	36%	24%	14%	9%	9%	22%	5%	2%	2%	2%	5%	5%	2%
Interior	29%	33%	15%	8%	5%	12%	17%	3%	1%	2%	4%	1%	1%
DIY	36%	21%	11%	6%	4%	15%	8%	3%	3%	1%	5%	4%	1%
Garden	33%	23%	11%	5%	4%	11%	6%	1%	1%	1%	4%	3%	2%
Gaming	24%	17%	10%	5%	6%	18%	3%	1%	6%	7%	3%	3%	2%
Food	29%	27%	11%	5%	3%	10%	5%	2%	2%	2%	4%	4%	2%
Sports	29%	38%	13%	5%	5%	16%	5%	1%	2%	1%	3%	4%	3%
Culture	26%	24%	10%	6%	5%	15%	5%	1%	2%	1%	3%	3%	3%
Baby	54%	30%	11%	7%	5%	11%	10%	2%	1%	2%	5%	6%	4%
Optics	37%	28%	13%	10%	9%	14%	8%	6%	4%	4%	7%	7%	3%
Travel	22%	25%	8%	3%	1%	7%	3%	1%	0%	0%	1%	2%	2%

Table 12 Social media app used to purchase

REACHING OUT TO BRANDS IS THE MOST OBVIOUS VIA THE MORE POPULAR SOCIAL MEDIA APPS, BUT COMMUNICATION APPS ALSO HAVE THEIR PLACE WITHIN THE CONSIDERATION SET

Instagram and Facebook are most often considered as communication channels with brands or companies. TikTok and YouTube are also relevant for retail sectors where these apps are used for purchase. Nonetheless, apps that are used for communication with peers can also be an option for communication with brands. Messenger is the most relevant one (all sectors but Garden), followed by WhatsApp and Twitter.

	Facebook	Instagram	TikTok	Snapchat	Twitter	YouTube	Pinterest	LinkedIn	Twitch	Discord	WhatsApp	Messenger	Other
Fashion	32%	46%	18%	8%	7%	8%	2%	2%	1%	1%	9%	12%	1%
Health	33%	29%	14%	9%	8%	10%	4%	4%	2%	2%	9%	12%	2%
Beauty	31%	39%	16%	14%	11%	9%	6%	4%	3%	2%	7%	11%	1%
Electronics	39%	27%	12%	9%	13%	14%	4%	5%	2%	3%	13%	17%	2%
Interior	28%	30%	9%	7%	6%	9%	9%	6%	3%	1%	9%	14%	1%
DIY	35%	22%	9%	6%	5%	10%	6%	5%	2%	2%	11%	16%	1%
Garden	33%	23%	11%	5%	4%	11%	6%	1%	1%	1%	4%	3%	2%
Gaming	30%	21%	7%	6%	10%	10%	3%	4%	5%	7%	9%	11%	1%
Food	37%	30%	7%	7%	5%	5%	3%	3%	2%	1%	12%	15%	1%
Sports	34%	36%	9%	6%	6%	9%	2%	4%	1%	1%	9%	11%	1%
Culture	29%	26%	7%	3%	9%	8%	3%	2%	2%	2%	9%	11%	1%
Baby	50%	30%	9%	8%	6%	8%	5%	4%	2%	2%	13%	18%	1%
Optics	36%	31%	12%	10%	9%	12%	8%	7%	4%	5%	12%	15%	0%
Travel	28%	27%	4%	3%	4%	4%	1%	2%	1%	1%	12%	15%	2%

Table 13 Willingness to use social media apps for communication with brands or companies

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Authors: Marijke De Veirman, Ilse Bruwiere and Eveline Mollaert
Graphic design: Joris Thys

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You can consult and download this report online on **www.smibarometer.be**

Contact us:
www.smibarometer.be
marijke.deveirman@arteveldehs.be

Tomas Legrand, Hoogpoort 15, 9000 Gent
www.arteveldehs.be