SMI Barometer

2021-2022

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

Research at **Artevelde**
University of Applied Sciences

comeos

a:artevelde
university of applied sciences

Preface

Dear reader,

We are excited to present the third 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 people (16 to 24 year-olds).

Goal of the research

Since 2019, The Artevelde University of Applied Sciences and Comeos, the Belgian federation for commerce and services, monitor trends on an annual basis. These contain trends on the adoption, use and evaluation of social media, and influencer marketing. This research is intended to serve as a benchmark for brands, offering the most up-to-date information on how Belgian youngsters experience branding and influencer marketing via social media. To this end, we annually question a representative sample of Belgian youngsters between 16 and 24 years old. Furthermore, we gather in-depth insights through qualitative research, both among youngsters and among Belgian retail brands.

Survey scope

This is the third edition of the SMI Barometer, and the second national edition. While the first edition focused only on Flemish youngsters, this is the second year in a row that the research has been executed among Belgian 16 to 24 year-olds. Thanks to the broader geographical scope, we can now present trends for the North (Dutch-speaking youngsters) and South (French-speaking youngsters) of Belgium.

Changes in survey

Compared to last year, we questioned a number of additional topics. Specifically, we updated the list of social media channels, and took a closer look at the influence of influencers on the daily lives of young people, broader than just their commercial impact. In addition, we added an extra section about podcasting, in line with the increasing popularity of this medium.

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
May 2022

Table of contents

Executive summary

10 Key insights

1. **Instagram is the no. 1 social media channel, but may have reached its peak**

83% of the Belgian youngsters use Instagram (almost) daily or more frequently. Next in line are YouTube (69.3 % daily use), Snapchat (65.8 % daily use), TikTok (62.7% daily use) and Facebook (58.7% daily use). There are some indications that Instagram may have reached its peak, as the channel is no longer growing among Belgian youngsters (no significant difference between 2020 and 2022) and in Flanders, the percentage of daily Instagram users slightly decreased (84,8% in 2021 compared to 87.9% in 2020).

2. **YouTube is the most widespread social media channel**

95.4% of the Belgian youngsters use YouTube at least once a month. Therefore, YouTube is the most widespread social media channel. However, it is used less intensively compared to Instagram, Snapchat and TikTok, i.e. channels that focus on images and short-form videos. Belgian youngsters mainly turn to YouTube for the regular, long-form videos rather than short-form videos.

3. **The quick rise of TikTok continues**

62.7% of the Belgian youngsters use TikTok at least daily. Last year we already noticed a striking increase in the use of TikTok among Belgian youngsters and this trend continues this year (+ 15.8%). This shows that TikTok is not a passing fad or hype and should be considered as one of the most important social media channels to connect with youngsters today. Youngsters mainly use the channel to find distraction, kill time and for its high entertainment value. Along with the success of TikTok among young people, Belgian retail brands also have an increased interest in TikTok and acknowledge the importance of the channel to reach a young audience. Still, retailers remain rather hesitant about integrating TikTok in their social media marketing mix. This hesitation was often attributed to the fact that they have a wider target audience than merely youngsters, and the time and financial investment required to create content.

4. **Facebook is struggling to attract young generations**

Facebook is no longer in the top 3 of the social media channels most used by youngsters. 58.7% of the Belgian youngsters use the channel at least daily. We discovered two main reasons for the declining Facebook use. To youngsters, Facebook has become a very functional social media channel which they use to stay up to date of events, groups (which are often related to school), news, and – in some cases – to sell stuff via Marketplace. Facebook is also perceived as a channel for older people (and hence less relevant for their age group). Particularly striking is the fact that only 37.3% of the 16 to 18 year-olds uses Facebook (almost) daily or more. Facebook thus seems to lose traction with younger generations. This number is in sharp contrast with the (almost) daily or more TikTok users among this age group, namely 74.7%. This poses major challenges for brands that want to engage with younger target groups.

5. The importance of short-form, entertaining content

Youngsters prefer moving images and short-form entertaining videos. Mindlessly scrolling through TikTok videos seems to be an important pastime for youngsters. Also, concerning branded content, youngsters seem to prefer short videos and stories, compared to static posts within their feed. Brands also acknowledge the fact that moving images attract attention. An important sidenote is the fact that youngsters also worry about their social media use – TikTok in particular – and admit that it can be very addictive.

6. TikTok offers major opportunities for marketing communication

Young people prefer brand-related content from brands they engage with themselves. More specifically, they prefer organic branded content, either from brands or influencers they started following themselves, rather than paid ads that appear in their feeds. Instagram remains the more natural habitat for brand communication, but TikTok provides increased opportunities. While last year, only 14% of the Belgian TikTok users was open to brand-related content on TikTok, both from brands and TikTok'ers, this increased this year to 35.6% and 34.7%. Moreover, it appeared that ads on TikTok are considered less disturbing, because they blend in the TikTok style and/or are easily skippable and therefore do not interrupt their flow.

7. The impact of influencer marketing is still growing among Belgian youngsters

86,6% of the Belgian youngsters follow influencers on social media. Instagram is the most popular channel to follow influencers, followed by YouTube and TikTok. Influencer marketing remains an effective tool for brand communication and is still growing. Youngsters who follow influencers are convinced that it is good for brands to involve influencers for commercial purposes (74%). 32.3% of the young people who follow influencers indicate that they have bought a brand an influencer endorsed (+6.1% compared to last year), 40.1% indicated that they started following a brand an influencer endorsed (+ 6.6% compared to last year) and 56.7% (+0.8% compared to last year) indicated they looked up more information about a brand an influencer endorsed, in the past three months. These numbers indicate that the impact of influencer marketing is still growing among Belgian youngsters.

8. Authenticity is key in influencer marketing

Advertising literacy towards influencer marketing appears to be high among youngsters. Youngsters are aware of the fact that influencers promote brands out of commercial motives. They do attach a lot of importance to authenticity and transparency when it comes to influencer marketing. Influencers should provide authentic reviews and only promote brands they genuinely like. Moreover, they should be transparent about the commercial nature of their posts. Advertisers are also well-aware that influencers' main assets are their perceived authenticity and credibility. Therefore, they put a lot of effort into finding the right influencers, so they can be confident that they will deliver when given creative freedom. Influencers need to fit perfectly with the brand's image and the intended campaign and may not act as an endorser for too many (similar) brands. In this regard, we also noticed an emerging shift to long-term ambassador programs, rather than one-off partnerships.

9. Influencers are an important source of inspiration and may elicit behavior change

Influencers play an important role in youngsters' lives. Youngsters turn to them, not only for entertainment (i.e. the no. 1 reason to follow influencers), but also as a source of inspiration and information. As such, the possibility to learn from them and their credibility were found to be important drivers to follow influencers. Hence, influencers not only impact youngsters' brand preferences and buying behaviour, they also influence youngsters in other aspects of life. As such, among 23.9% of the youngsters, an influencer incited them to dress differently. Also, influencers inspire youngsters to game (13.7%), to invest (10.9%) or more generally to start a new hobby (9.6%). Furthermore, influencers have an important impact on youngsters' eating and exercising behaviour. 24.8% of the Belgian 16-24 year-olds say that an influencer has already motivated them to exercise more and 23.6% was prompted to eat healthier. Influencers may also help youngsters cope with mental health issues. 15.8% of the Belgian youngsters was motivated by an influencer to pay more attention to their mental health so that they would feel better about themselves and 6.7% was inspired to seek psychological help.

10. Podcasts are a promising platform for brands

55.5% of the Belgian 16-24 year-olds listen to podcasts. Of the youngsters who listen to podcasts regularly (at least once a week), 28.9% believe it is good for brands to cooperate with existing podcasts and 25.5% believes it beneficial for brands to create their own podcast. Podcasts appear to be a promising platform for brands in terms of conversion, as 25.8% of the youngsters who listen to podcasts look (or have looked) for more information about a brand due to a podcast and 19.6% admit having bought a product or service due to a podcast in the past three months. Brands acknowledge the potential of podcasts for marketing, however, they do not include podcasts in their marketing mix just yet. The main hesitation lies in the fact that making a podcast takes a lot of time and effort, and that the return on investment is unclear.

Research question: context & terminology

What can you expect from this 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 24 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 Belgians between the ages of 16 and 24.

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

1. **Clubhouse***
2. **Discord**
3. **Facebook**
4. **Instagram**
5. **LinkedIn**
6. **OnlyFans***
7. **Pinterest**
8. **Signal***
9. **Snapchat**
10. **Strava***
11. **TikTok**
12. **Tinder***
13. **Triller***
14. **Twitch**
15. **Twitter**
16. **WhatsApp**

* = new compared to SMI-barometer 2021

Definition of 'influencer marketing'

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

1. A person (This way organizations and PR teams are excluded)
2. who spreads contextually-relevant messages (this is possible in a large, but also limited context)
3. which are also meaningful (to their followers),
4. that these messages trigger actions from 'these others' (The impact on behaviour is crucial. It is not solely a matter of communicative power).

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

Methodology: three studies

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

1. Online survey among Belgian young people

The findings and results of the Social Media & Influencer marketing barometer are based on an online survey amongst Belgians between the ages of 16 and 24. The data collection took place between November 2021 and January 2022 (similar time period as previous editions).

In Flanders, the distribution of the survey was achieved through students, who distributed the survey to the target group, as well as through the University's network and through an online panel provider. In Brussels and Wallonia, an online panel provider distributed the survey to the target group. After data cleaning consisting of removing incomplete and incorrect data, 3291 valid cases were identified (n2020 = 3263).

2. Qualitative research among Belgian young people

From February to April 2022, we conducted 34 individual online qualitative interviews with a mix of Dutch-speaking (n = 19) and French-speaking (n = 15) youngsters. These respondents were recruited via the quantitative sample which considered age, gender, and region (provinces). The respondents were interviewed online (via WhatsApp or exceptionally e-mail) to gain insights regarding their individual use and experience of social media, brands on social media and influencers.

3. In-depth interviews with Belgian retail brands

During the period October 2021 to March 2022 we also spoke to 12 (digital) marketing managers of retail brands. These interviews were conducted via videocall.

These retail brands were CASA, Delhaize (2), IKEA, MediaMarkt, Shopopop, Signify, Foodmaker, BurgerBrands, Kruidvat and LolaLiza (2).

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 youth population, we used weighting[1] to make our sample reflect the population, based on census data from Statbel. We weighted the survey data based on age group, gender,
and region.

Comparative Analyses

If we encounter significant differences, these trends will be discussed:

- females (54.1%, n = 1780) and males (44.6%, n = 1469)
- age groups ((16-18 years (37.9%, n = 1246), 19-21 years (34.9%, n = 1124) and 22-24 years (28%, n = 921))
- Dutch-speaking (67.3%, n = 2215) and French-speaking (32.7%, n =1076) youngsters.

Statistical analysis was carried out using IBM SPSS Statistics. Reported differences between groups are at least significant at the .05 level (* <.05; ** < .001).

Evolution 2020 – 2021

Moreover, we consider the evolution in Belgium between 2020 (n = 3263) and 2021 (n = 3291) and in Flanders since 2019, and if they were 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 channel 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 2021

Age

The target group of this survey are Belgian youngsters between the ages of 16 and 24. The mean age of the n = 3291 participants was 19.67 years (SD = 2.55) with min. 16 years and max. 24 years. As previous research shows that social media use may significantly differ across age groups, we created 3 age categories: 16-18 years (n = 1246), 19-21 years (n = 1124) and 22-24 years (n = 921). Figure 1 shows the distribution of participants across these age groups.

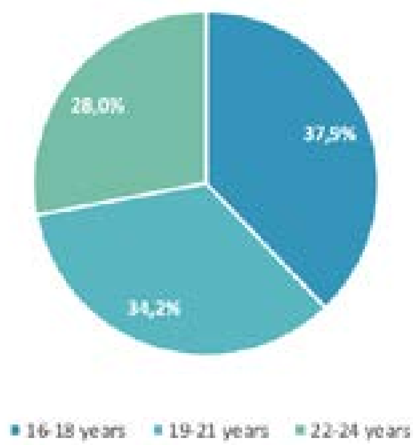


Figure 1: Distribution of participants across age groups (in %, n = 3291)

Gender

54.1% females (n = 1780) and 44.6% males (n = 1469) participated in the online survey. 42 participants (1.3%) indicated gender 'X'.

Education and employment

Table 1 provides an overview of the which studies the participants were enrolled in at the time of survey. When participants marked 'other', they indicated adult education, a seventh specialization year after com-pleting secondary education, or advanced Bachelor or Master studies / continuing education. 12.1% of the participants indicated that they worked, 2.8% of the respondents were unemployed at the time of the survey.

General Secondary Education	18,7%
Technical Secondary Education	14,3%
Vocational Secondary Education	8,6%
Art Secondary Education	1,5%
Bachelor's studies	27,3%
Master's studies	9,1%
Doctoral Training	0,9%
Employed	12,1%
Unemployed	2,8%
Other	4,6%

Table 1: Overview education / employment participants

Geographic distribution

Figure 2 shows the distribution of participants across the regions in Belgium. 67.3% of the sample was Dutch-speaking (n = 2215); and 32.7% French-speaking (n = 1076).

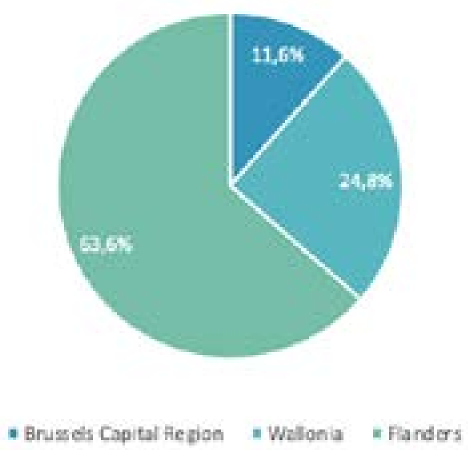


Figure 2: Distribution of participants across regions

Social media use

Social media use among Belgian youngsters

Figure 4 provides an overview of how often Belgian youngsters use social media and messaging services in their everyday lives (in %). Other mentioned social media were Reddit, BeReal, Telegram and Tumblr.

KEY INSIGHTS

Instagram is the most intensely, with almost 7 out of 10 youngsters using it several times a day and 83% (almost) daily or more frequent use. Next in line are YouTube (69.3 % daily use), Snapchat (65.8 % daily use), TikTok (62.7% daily use) and Facebook (58.7% daily use).

YouTube is the most widespread social medium, 95.4% of the Belgian youngsters use it at least monthly. Next in line are Instagram (91.4%), Snapchat (82.1%) and Facebook (81.7%).

There is a continuing steep increase in TikTok use. 62.7% of the Belgian youngsters use TikTok at least daily and 75.2% at least monthly (+ 15.8% daily use compared to 2020).

The downward trend in the use of Facebook continues (- 12.1% daily use compared to 2020).

Facebook remains important, but it is noticeable that youngsters in particular use Facebook Messenger (62.3% daily use) more than the Facebook social media channel (57% daily use).

Instagram, YouTube and Snapchat are the top-3 daily used social media channels, among Dutch-speaking as well as among French-speaking youngsters. Still, there are some differences between language groups in social media use. Instagram, Snapchat, TikTok and Facebook are more frequently used among Dutch-speaking youngsters, while YouTube and Twitch are more frequently used among French-speaking youngsters.

Some social media are more popular among female vs. male young people. There are also some **age differences** in social media use:

- User profiles of YouTube, Twitch and Discord are skewed towards men.
- Instagram, Snapchat, TikTok and Facebook are more frequently used among female compared to male youngsters.
- Instagram, Snapchat and TikTok are more frequently used among 16-18 years-olds, while Facebook and WhatsApp are more frequently used among older youngsters (22 – 24 year-olds).

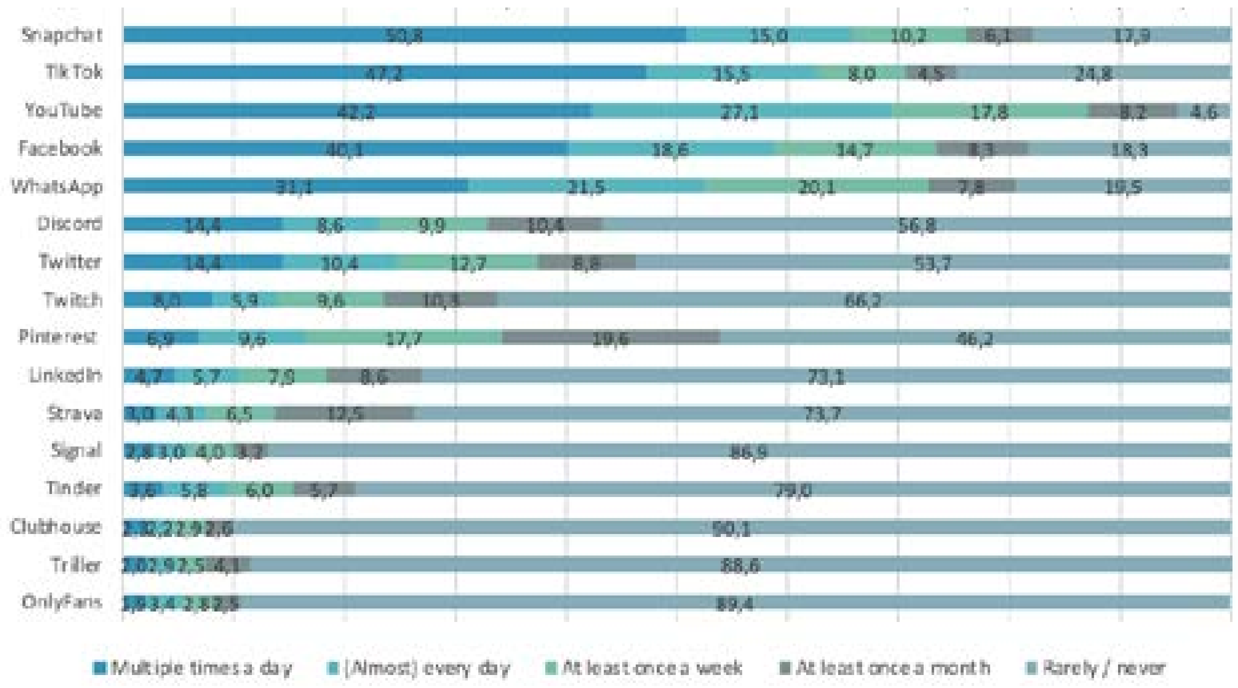


Figure 3: Social media use among Belgian youngsters (in %; n = 3291)

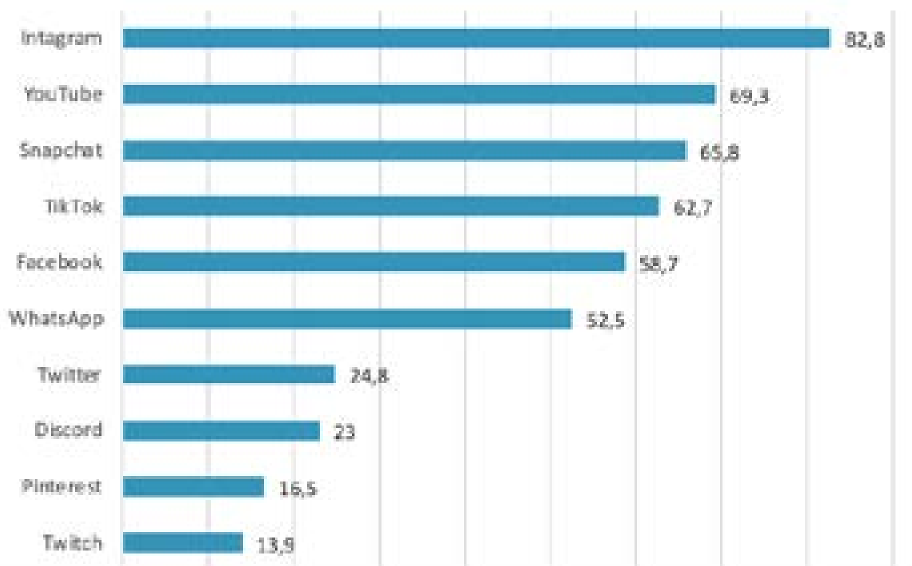


Figure 4: Top 10 most frequently used social media among Belgian youngsters (expressed in % of youngsters that uses the channel (almost)daily or more frequently) (in %; n = 3291)

Instagram remains the no. 1 social media channel among Belgian youngsters but may have reached its peak

Instagram is the most frequently used social media channel among Belgian youngsters, with almost 7 out of 10 youngsters using it several times a day and 83% using it (almost) daily or more frequently.

Nonetheless, it seems that the channel has reached its peak as it is no longer growing among Belgian youngsters (i.e.i.e., there is no significant difference between 2020 and 2021).

As Instagram offers different functionalities, we specifically asked youngsters how often they checked their Instagram feed and stories and how often they used Instagram reels and visited the Instagram shop.

We only gauged for the use of these different functionalities among respondents who use Instagram at least weekly (n = 2875).

The most used Instagram functionalities are the Instagram Feed and Stories. Stories allow Instagram users to share photos and videos to their Story. Like Snaps in Snapchat, Instagram Stories disappear after 24 hours. They are used at least daily by 81% of the regular Instagram users.

Another Instagram functionality is Reels. Instagram Reels lets users create and edit videos up to 60 seconds long. 23.7% of the regular Instagram users use Reels daily or more frequently. The Instagram shop tab, where people can shop from their favourite brands without having to leave Instagram, isn't used often by youngsters. Our interviews with retailers confirmed this and showed that mainly product tags work, rather than the separate shopping tab.

	Multiple times a day	(Almost) every day	At least once a week	At least once a month	Rarely / never
Instagram Feed	69.7	18.8	7.2	1.4	2.9
Instagram Stories	56.8	24.1	11	4.2	4
Instagram Reels	24.5	19.1	22.5	10.1	23.7
Instagram Shop	5.1	4.6	8.7	11.7	69.9

| Table 2: Use of different Instagram functionalities among regular Instagram users (in %; n = 2875)

YouTube used by many, but less intensely

95.4% of the Belgian youngsters use YouTube at least once a month. Therefore, YouTube is the most widespread social media channel. 69.3% of the Belgian youngsters use YouTube at least daily and 87.1% at least weekly. When we consider daily use, YouTube is the second most popular social media channel among Belgian youngsters. However, it is used less intensely compared to Instagram, Snapchat and TikTok, i.e., channels that focus on images and short-form videos.

YouTube introduced its own short-form videos, i.e., YouTube Shorts, which enables users to produce vertical short-form videos with features such as video segmenting, app-based recording, and musical overlays, similar to TikTok. Videos must be 60 seconds or less and do not disappear like Instagram Reels or Stories. Our analysis showed that Belgian youngsters turn to YouTube for the regular, long-form videos rather than shorts.

	Multiple times a day	(Almost) every day	At least once a week	At least once a month	Rarely / never
YouTube videos	48.1	25.9	16.8	2,8	6.3
YouTube shorts	11	13.1	16.9	9.2	49,7

| Table 3: Use of different YouTube functionalities among regular YouTube users (in %; n = 2831)

2020 vs. 2021: steep increase for TikTok, decline for Facebook

An analysis of the 2020 vs. 2021 data indicates the following trends:

- There is no significant difference in use for Instagram
- Last year the explosive increase in the use of TikTok was already visible, that trend continues this year (+ 15.8%).
- The downward trend of Facebook use continues (- 12.1%).
- There is an increase in the use of Snapchat, TikTok, WhatsApp, Twitter, Discord, Pinterest, and Twitch compared to last year.
- The use of YouTube decreased slightly compared to last year.

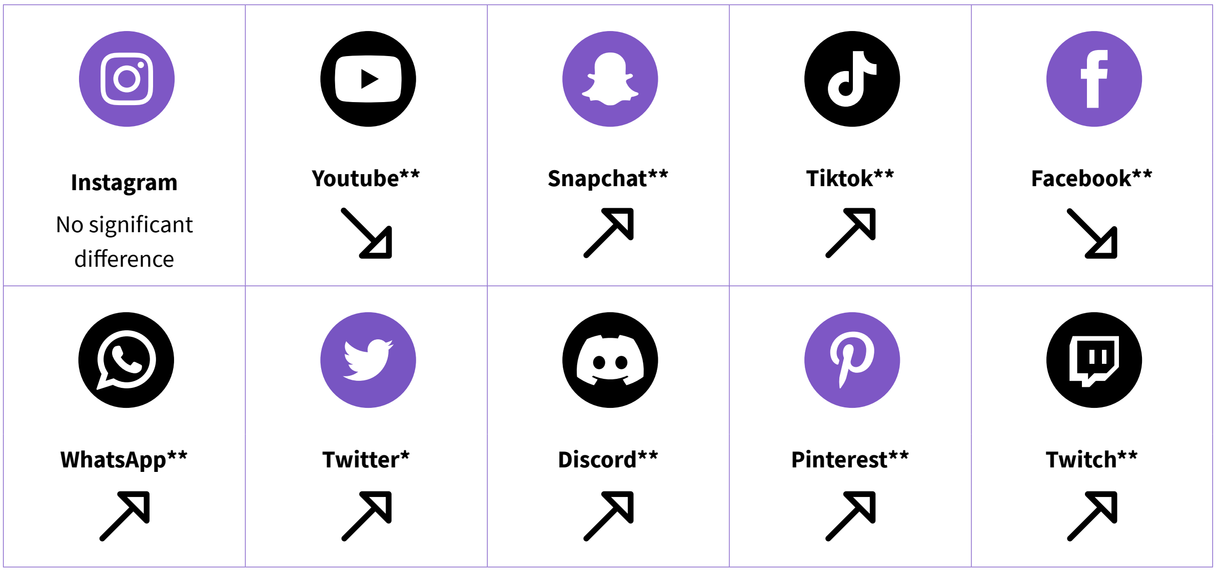


Figure 5: Social media use among Belgian youth: evolution 2020-2021

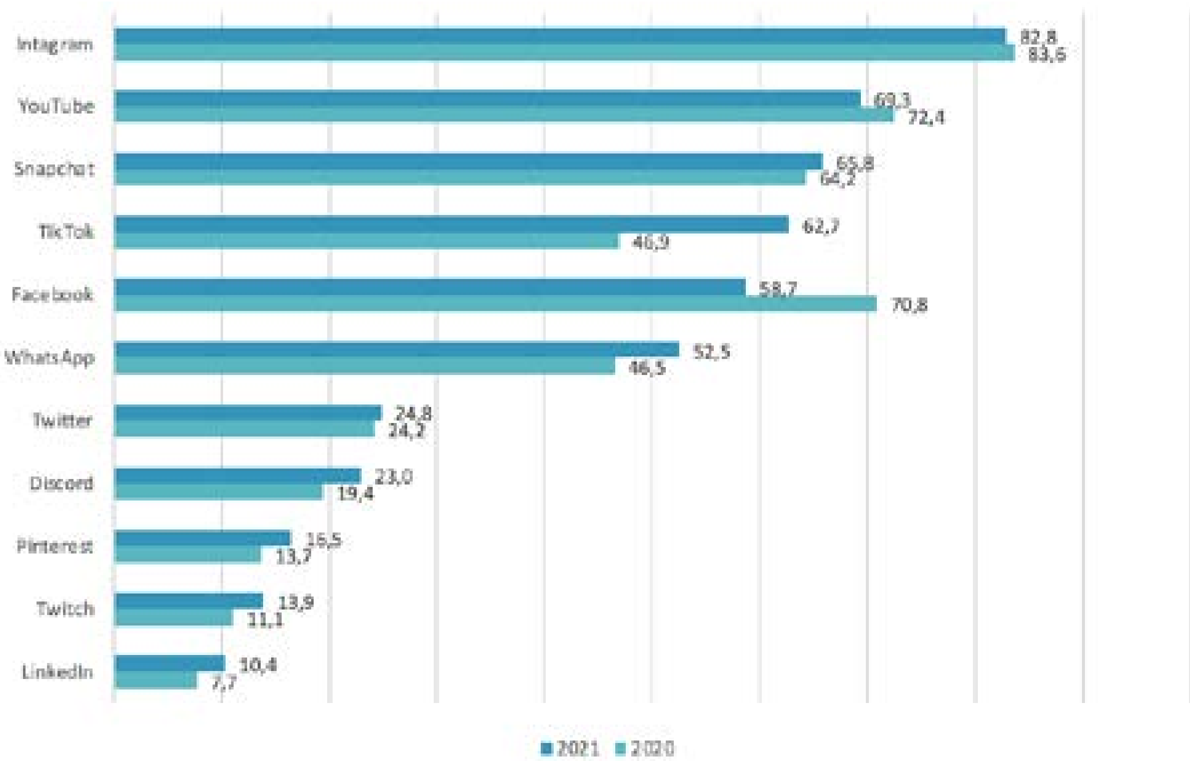


Figure 6: Evolution of daily social media among Belgian youngsters 2020-2021 (expressed in % of youngsters that uses the channel (almost)daily or more frequently) (in %; n = 3291)

To youngsters, Facebook has become a **very functional** social media channel, which explains its declining use. Youngsters use it to stay up to date of events, groups (which are often related to school), news, and – in some cases – to sell something via Marketplace. On top of this very functional image, Facebook is also perceived as a channel for older people (and hence less relevant for their age group). In other words, in our qualitative interviews Facebook is no longer perceived as hip, trendy and fun.

> *"En général la plupart d'entre nous trouve ça (Facebook) dépassé haha donc je n'utilise pas du tout, tout ce qui est lié à Facebook dont Messenger. Pour communiquer avec mes amis c'est Instagram ou Snap effectivement." (woman, 18 years)*

> *"Facebook c'est plutôt pour tout ce qui est lié aux groupes scolaires ou autres. Je l'utilise plus pour les choses pratiques et non pour " m'amuser." (woman, 22 years)*

> *"Parce que je l'utilise (parlant de Facebook) que pour la famille et pour vendre certains de mes habits que je n'utilise plus dans leur marketplace et j'utilise aussi Messenger à cette occasion. " (man, 16 years)*

> *"Facebook gebruik ik vooral voor mijn ouders en evenementen." (man, 17 years)*

> *"Facebook is voor evenementen zoals van school, clubs … daarnaast krijg ik ook nieuws van paginas die ik volg zoals HLN of het nieuwsblad. Op Facebook heb ik ook een schoolgroep waar er belangrijke info wordt gedeeld." (man, 22 years)*

> *"Op Facebook zie ik eigenlijk alleen maar foto's van familieleden of volwassenen met wie ik bevriend ben passeren. Op Instagram zijn er meer van mijn leeftijdsgenoten actief." (woman, 18 years)*

> *"Ik gebruik onder andere Facebook om verjaardagen bij te houden en dingen te regelen " (woman, 17 years)*

The decrease in Facebook use among youngsters, hasn't gone unnoticed by brands. For instance:

> *"We merken echt een enorme switch van Facebook naar Instagram. Veel minder jongeren zijn actief aanwezig op Facebook. We merken dat veertig-plussers sinds enkele jaren Facebook ontdekt hebben, waardoor veel jongeren naar andere platformen zijn gegaan." (Vic Dresen, maketing manager BurgerBrands)*

Still, **Facebook remains an important channel for retailers**, as most brands have a larger target audience than just young people and because it allows for advanced targeting possibilities for advertising:

> *"We bereiken echt nog veel mensen via Facebook, als we de reports bekijken. Het handige aan Facebook is ook dat we elke post kunnen targetten. We kunnen effectief een Franse post richten naar Franstaligen en een Nederlandse naar Nederlandstaligen, wat het iets persoonlijker maakt. Op Instagram is dit niet mogelijk en posten we in het Engels." (Margot Vansteenkiste, digital marketeer LolaLiza)*

The TikTok-effect: importance of short-form video content

Our qualitative research teaches us that the main reasons for using TikTok are often related to finding distraction and killing time. This is quite different from YouTube where the use is more intentional and has some personal benefits (updates from YouTubers, school, learning, music,..).

> *"Ik gebruik TikTok puur voor men hoofd leeg te maken en te lachen.... Via YouTube luister ik nr hedendaagse liedjes en die herbeluister ik heel veel vaak een Playlist (woman, 24 years)*

> *'Ik gebruik TikTok als ik me verveel." (man 16 years)*

> *"YouTube gebruik ik om video's te bekijken (meestal vlogs) of extra hulp te zoeken voor school." (woman, 17 years)*

> *"J'écoute beaucoup de musique (sur YouTube). YouTube est là pour nous divertir." (woman, 17 years)*

> *"Des podcasts / l'actualité sportive … pas mal de divertissement et d'informations." (man, 16 years)*

> *"Des tutos quand je m'en sors pas avec certaines choses." (man, 16 years)*

Compared to YouTube, the shorter videos on Tiktok are often considered as more entertaining. Despite the fact that TikTok can result in endless scrolling, the longer video format on YouTube is often perceived as too time consuming. The latter especially holds for the South, where the video based apps such as YouTube have been more important compared to the North of Belgium.

> *"Ben par exemple sur Instagram quand je vois une courte vidéo drôle certaines fois ce sont des extraits d'une vidéo YouTube qu'on a pris … si je la trouve intéressante je pars sur YouTube pour la regarder en entier." (man, 16 years)*

> *"Alors pas très souvent car du YouTube a plus ou moins été remplacé par Tik Tok (c'est nouveau, c'est rapide) c'est donc plus attirant et addictif. Je regarde des vidéos YouTube que pendant les week-ends ou les vacances car je n'ai plus le temps à cause des cours de " perdre » autant de temps." (woman, 18 years)*

> *"Ik bekijk TikTok meestal als ik bijna ga slapen en geen zin heb om YouTube te kijken." (man, 18 years)*

> *"Par rapport aux autres je les (Instagram et TikTok) trouve plus ludiques plus agréables et tous mes amis sont dessus donc c'est notre principal moyen de communication." (woman, 16 years)*

> *"Par rapport à ça (parlant de TikTok) du coup c'est que c'est rapide, nous apprenons, découvrons donc énormément de choses en un temps record ce qui est géniale. En outre de plus en plus de personnes percent, buzz, se créent une communauté pour ce qu'ils sont, leur personnalité et pas forcément leur physique comme sur Instagram par ex et donc ils ne jouissent pas tous du « beauty privilege »." (woman, 18 years)*

The importance and rise of TikTok and of short video's also impact attitude towards branded content. Our qualitative research taught us that many youngsters prefer branded communication in video format compared to static posts within the feed.

> *"Stories spreken me meer aan omdat het makkelijker is om bv. op een link te klikken naar een website als de reclame me aanspreekt." (woman, 18 years)*

However, most youngsters also indicate that TikTok can be very addictive and results often in mindless scrolling. This addictive element of TikTok might be a threat for further growth of the channel as youngsters realize they sometimes spend a lot of time on this social media channel.

> *"TikTok je ne fais que regarder, c'est horrible d'ailleurs j'y passe des heures 😅." (woman, 23 years)*

> *"Ik ben gestopt met TikTok want ik werd er te hard door afgeleid. Te veel bezig met scrollen en te kijken naar video's." (woman, 18 years)*

> *"Ik verspilde er te veel tijd aan. Ik had ook even Tiktok gedownload voor tegen de verveling tijdens de vakantie, maar ik vond het echt tijd verspilling. Op beide (Instagram and TikTok) blijf ik gewoon scrollen en het is op zich wel leuk om naar te kijken, maar zo nutteloos." (woman, 17 years)*

Retail brands also acknowledge the **importance of moving images and entertaining video formats:**

> *"We hebben een switch gemaakt naar bewegend beeld. Voor elke campagne maken we nu ook altijd video's, reels. We proberen om dat meer te gaan inzetten, omdat we ook merken dat dat die jongere doelgroep wel aanspreekt." (Veerle De Taeye, marketing & communication manager CASA)*

> *"Als je een video hebt, al is het een short video of een GIF bijvoorbeeld, dan zijn mensen geneigd om iets langer er blijven bij stil te staan. Met de opkomst van TikTok en YouTube, dat nog steeds groot is, en Twitch, zijn de mensen ook meer en meer gewoon om videocontent te zien." (Vic Dresen, marketing manager BurgerBrands)*

> *"We zetten video in omdat onze Shoppers daar het beste op reageren, meer dan op enkel statische beelden." (Joyce Breukink, content marketeer Shopopop)*

Along with the success of TikTok among young people, **Belgian retail brands also have an increased interest in TikTok and acknowledge the importance of the channel to reach a young audience.**

> *"Dit jaar hebben we een paar Instagram Reels en TikTok's gemaakt, omdat we weten dat dat meer resoneert met die jongere doelgroep." (Jules Thys, digital content manager Foodmaker)*

> *"We weten dat er een enorme shift is geweest sinds de pandemie, TikTok heeft een mega boom gekregen. We kunnen gewoon die trein niet missen. Het plan is om hier ook op in te zetten, afhankelijk van het thema en de doelgroep van de campagne natuurlijk." (Coralie Vangeel, content specialist IKEA)*

Still, as most brands focus a-on a **wider audience** than youngsters, retailers remain hesitant about TikTok (and other social media channels that are particularly popular among a young audience, e.g., Snapchat).

> *"TikTok en Snapchat zijn upcoming, maar wel onder een hele selectieve en hele jonge doelgroep. Als Kruidvat kiezen we ervoor om de massa te bereiken via Facebook, Instagram en natuurlijk onze eigen blog. De shopper doelgroep (vrouw 25-45) zit vooral op deze kanalen, dus daar ligt onze focus." (Lotje Wijnstra, marketing manager Kruidvat)*

They often refer to the **time and financial investment required to create content.** Therefore, brands also rely on influencers' content creation skills when it comes to TikTok.

> *"We houden de social media trends in de gaten, zo zullen we ook actiever worden op TikTok. We merken dat dat erg leeft bij jongeren en daar zoeken we graag op tijd aansluiting mee." (Joyce Breukink, content marketeer Shopopop)*

> *"De manier van content maken is helemaal anders en veel intensiever, omdat je met live zit, met video, met content creation. Dus dat is voor ons nog wel een zoektocht. Vooral een budgettaire kwestie." (Vic Dresen, marketing manager BurgerBrands)*

Brands understand that TikTok revolves around **entertainment and fun content** (which our research confirms). For instance, a brand that aims to capitalize on the latter is LolaLiza:

> *"De focus ligt op het creëren van awareness en genereren van volgers, eerder dan op sales. We posten vooral inspirationele, raw content, bijvoorbeeld behind-the-scenes filmpjes (hoe het eraan toe gaat op een shoot, eens een model dat poseert,...). Het is altijd kort en meestal unedited en dat werkt echt heel goed. We posten echt authentieke content, terwijl het op Instagram bijvoorbeeld wat meer polished is." (Margot Vansteenkiste en Annelien Alaerts, LolaLiza, digital marketeer en marketing manager LolaLiza).*

Evolution of social media use in Flanders 2019 – 2021

Last year, the use of social media increased among youngsters (probably related to the covid-19 crisis and related policy responses e.g., lockdowns). Nonetheless, several social media channels continued to grow:

- An analysis of the 2019 vs. 2021 data for Flanders[1] confirms the continuing growing popularity of TikTok. While the rise in popularity of TikTok was already remarkable last year, the steep increase in use is even more outspoken this year. TikTok has grown over the past two years from a niche channel for young girls to the platform of choice for young people to consume short-form content.
- Snapchat continues to grow year after year at a slow but steady pace.
- We also noticed a continuously upward trend for several niche channels, such as Pinterest, LinkedIn, and Twitch.

The higher popularity of several social media channels contrasts strongly with the lower use of Facebook among Flemish youngsters aged between 16-24 years.

Instagram and YouTube are the most important social media channels for Flemish 16 to24 year-olds, but there are some first signs they both might have reached their peaks. The percentage of youngsters that use Instagram and YouTube daily, slightly decreased compared to last year.

1 The 2019 – 2020 SMI-Barometer only included data for Flanders, that is why insights on evolution between 2019 and 2021 only apply to Flanders.

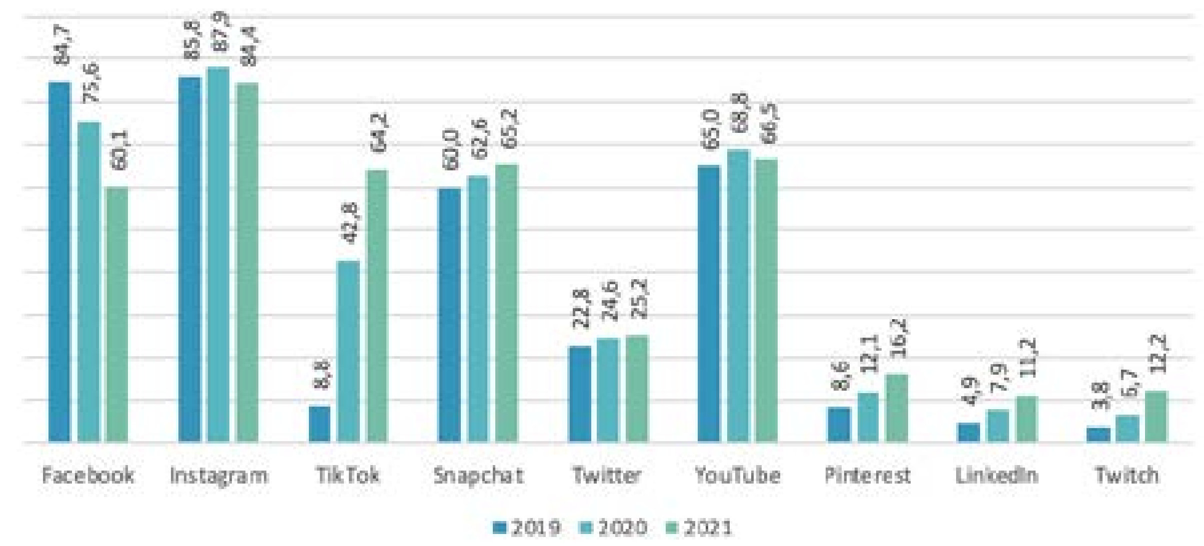


Figure 7: Evolution of daily social media among Flemish youngsters 2019-2020-2021 (expressed in % of youngsters that uses the channel (almost)daily or more frequently) (in %)

Regional differences in social media use

When comparing social media usage between Dutch-speaking (North) and French-speaking (South) young people, we noticed some significant differences in frequency of usage:

- Instagram, Snapchat, TikTok and Facebook are more frequently used in the North
- YouTube and Twitch are more frequently used in the South.

There are some differences compared to last year:

- Instagram, TikTok, Facebook and WhatsApp remain more frequently used in the North, and Twitch and YouTube in the South.
- TikTok is now more frequently used in the North while last year, it was more frequently used in the South. Snapchat is no longer more frequently used in the South (no difference between groups this year).

The table below provides a clear overview:

Instagram* N	**Youtube**** S	**Snapchat**** No significant difference	**Tiktok**** N	**Facebook**** N
WhatsApp** N	**Twitter*** No significant difference	**Discord**** No significant difference	**Pinterest**** No significant difference	**Twitch**** S

Figure 8: Social media use among Belgian youth: comparison North – South

The figure below shows the differences in (almost) daily or more frequent usage of different social media channels among Dutch-speaking and French-speaking youngsters. The top-3 social media channels are the same for Dutch-speaking and French-speaking youngsters (Instagram, YouTube, and Snapchat), however, several channels are more established in the North compared to the South, and vice versa. Particularly striking is that WhatsApp is more established in Flanders, while the daily use of YouTube is higher in the South.

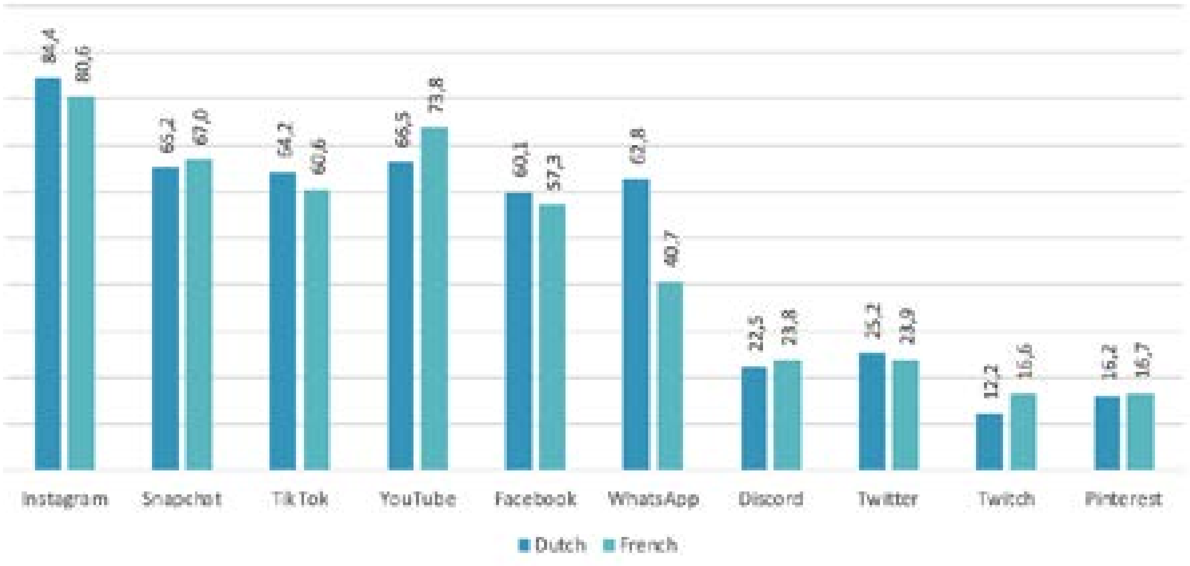


Figure 9: Comparison of top 10 most frequently used social media among Dutch-speaking and French-speaking Belgian youngsters (expressed in % of youngsters that uses the channel (almost)daily or more frequently)

Social media use differs among male and female youngsters

When we compare social media usage between male and female youngsters, we find significant differences in usage across all social media. This different user profile between genders obviously also has implications for brands targeting a more female or male target group as:

- YouTube, Twitter, Discord, and Twitch are more frequently used by males
- Instagram, Snapchat, TikTok, and Facebook are more frequently used by females

These differences in gender profile in social media use are similar to last year.

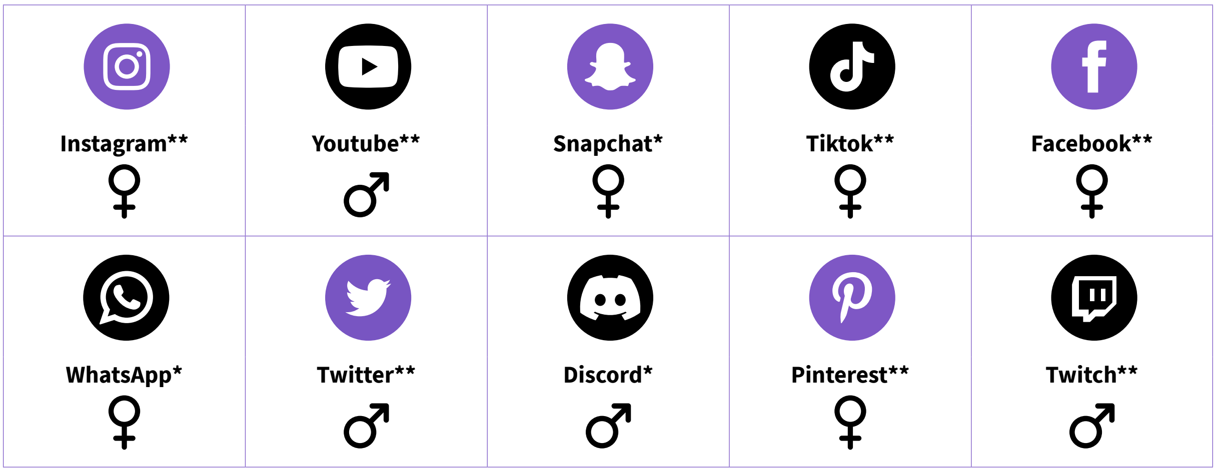


Figure 10: Social media use among Belgian youth: comparison males and females

Related to the above, the most frequently used channels also differ for males and females, with YouTube, Instagram, Snapchat, TikTok and Facebook as top 5 for males and Instagram, TikTok, Snapchat, Facebook, and YouTube as top 5 for females.

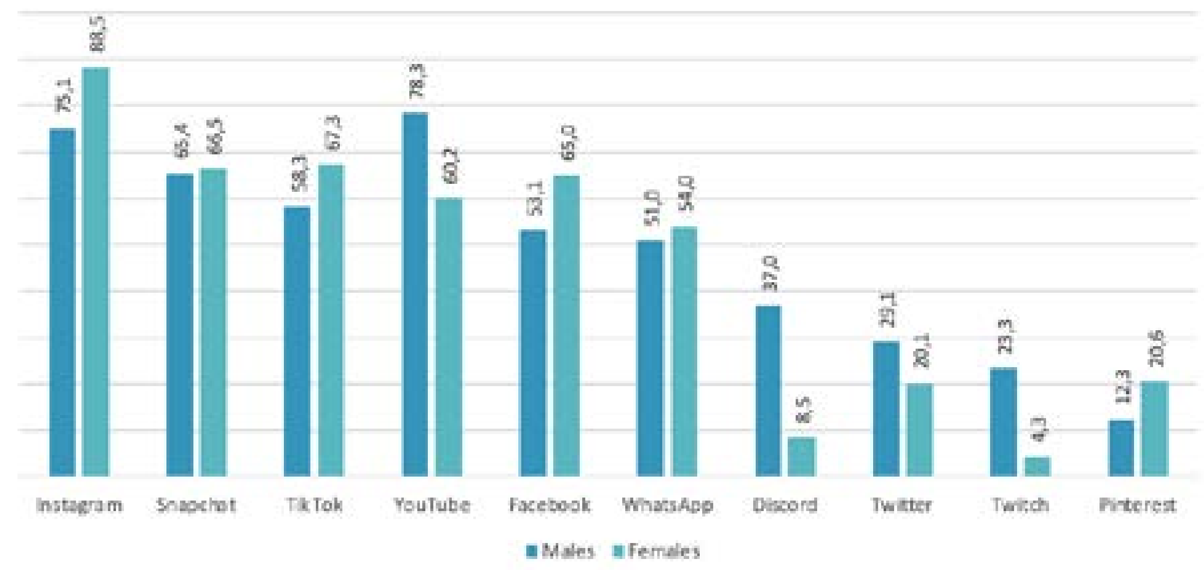


Figure 11: Comparison of top 10 most frequently used social media among male and female Belgian youngsters (expressed in % of youngsters that uses the channel (almost)daily or more frequently)

For some social media channels usage differs according to age

Next, we also investigated age differences in social media use. The figure and table below provide a clear overview:

Instagram** Used less as age group increases	**Youtube** No significant differences	**Snapchat**** Used less as age group increases	**Tiktok**** Used less as age group increases	**Facebook**** Used more as age group increases
WhatsApp* Used more as age group increases	**Twitter*** Used most among 19-21 year-olds, followed by 22-24 and 16-18 year-olds	**Discord*** Used more as age group increases	**Pinterest** No significant differences	**Twitch**** Used more as age group increases

Figure 12: Social media use among Belgian youth: comparison age groups

When we take a closer look at the daily use of different social media channels among different age groups, the enormous popularity of TikTok among the youngest age group is particularly striking. Almost 75% of the 16- to 18- year-olds use TikTok at least daily. This is a stark contrast to the comparatively low percentage of Facebook users within this age group (37.3%). If this is a harbinger of the fact that young people are increasingly staying away from Facebook, it poses quite a few challenges for brands when it comes to marketing communications to this target audience. It's also not very promising for the future use of Facebook.

	16-18	19-21	22-24
Instagram	88,8%	84,4%	75,9%
Snapchat	80,0%	66,0%	48,3%
TikTok	74,7%	66,0%	48,3%
YouTube	69,2%	71,9%	67,0%
Facebook	37,3%	67,4%	70,9%
WhatsApp	46,9%	53,2%	57,0%
Discord	20,9%	25,8%	22,3%
Twitter	20,4%	28,8%	24,8%
Twitch	9,0%	15,5%	17,2%
Pinterest	14,5%	15,9%	18,5%

Table 4: Comparison of top 10 most frequently used social media across age groups (expressed in % of youngsters that uses the channel (almost)daily or more frequently)

Social media & brands through the eyes of Belgian youngsters

KEY INSIGHTS

Belgian youngsters are the most frequently exposed to brand-related content on Instagram, YouTube, followed at a distance by TikTok and Facebook.

Relative to its popularity among Belgian youngsters, youngsters are less frequently exposed to brand-related content on Snapchat and WhatsApp.

Relative to their widespread use, youngsters are not often approached by brands via instant messaging apps.

Figure 13 provides an overview of how often Belgian young people encounter brand-related content on social media. Only frequent users of the respective social medium (= respondents who use the medium at least 1x per week or more) were taken into consideration. Figure 15 also includes infrequent users to ensure that an accurate picture is given of the advertising potential of the various social media channels (n = 3291).

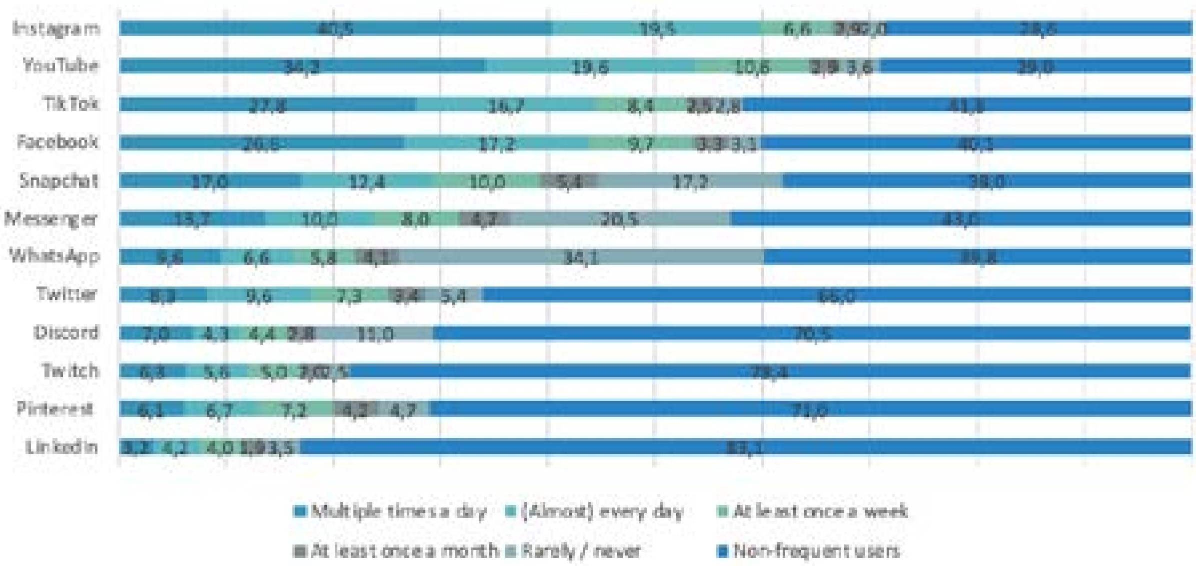


Figure 13: Overview of brand touchpoints on various social media channels (in %; n = 3291)

The following figure compares social media use to how often youngsters are exposed to brand-related content on each of the channels.

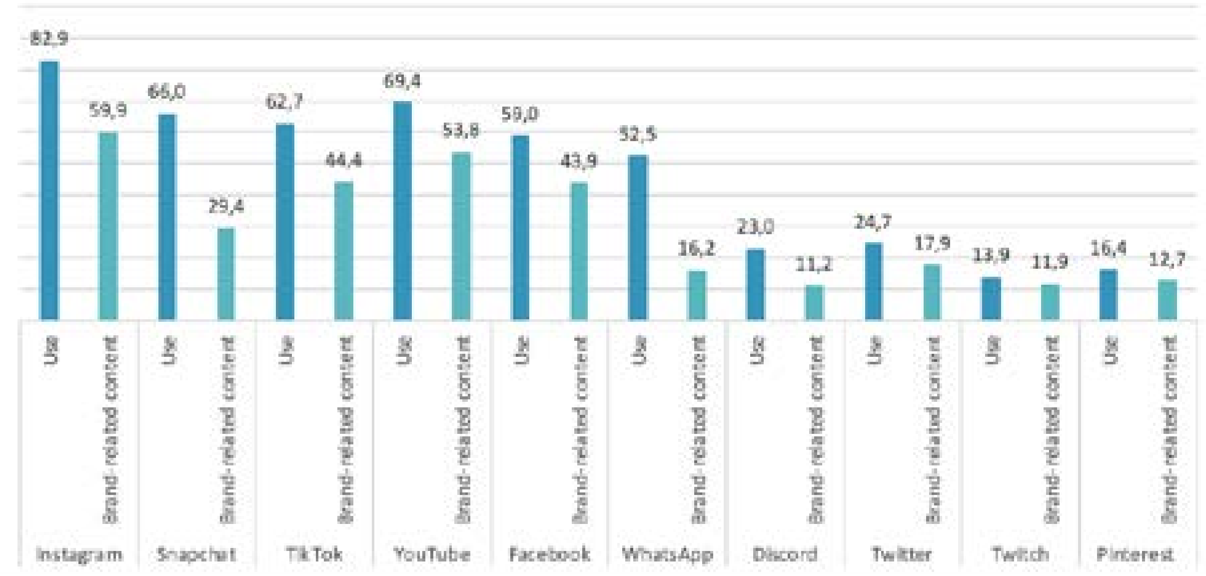


Figure 14: Comparison between usage and encountering of brand-related content of top 10 most frequently used social media among Belgian youngsters (expressed in % of youngsters that uses the channel / encounters brand-related content (almost)daily or more frequently)

Looking into differences across gender, we found that women encounter more brand-related content on Instagram and TikTok and males on Snapchat, Twitter, YouTube, LinkedIn, Twitch, Discord, WhatsApp, and Messenger. There are no gender differences for Facebook and Pinterest.

Furthermore, it appears that French-speaking youngsters are more often in touch with brands on Facebook, Snapchat, Twitter, YouTube, Discord, WhatsApp, and Messenger compared to Dutch-speaking youngsters. There are no significant differences for encounters with brand related content in Instagram, TikTok, and Pinterest.

Differences in exposure to brand-related content among age groups, mostly follow the differences in use of these channels.

When we look at the evolution, youngsters reported more frequent exposure to brand-related content in 2020 on Facebook, Instagram, and YouTube compared to 2021. For TikTok, YouTube, LinkedIn, Discord, and WhatsApp, we see an increase in 2021. For other channels, there were no significant differences in exposure to brand-related content between 2020 and 2021.

Social media and brands: preferred touchpoints

Next to gauging how often young Belgians are confronted with brand-related content on the different social media channels, we have also asked them how they want to be approached by retail brands on social media. Figure 16 provides an overview of the features that young Belgians prefer when it comes to brand-related content. The percentages are based on frequent users, namely those who use the social media channel at least once a week (Facebook n =1954, Facebook Messenger n = 1858, Instagram n = 2328, YouTube n = 2316, TikTok n = 1895). Participants could select multiple options. 11.7% does not find any of the proposed features appropriate for brand-related content.

The analysis shows that:

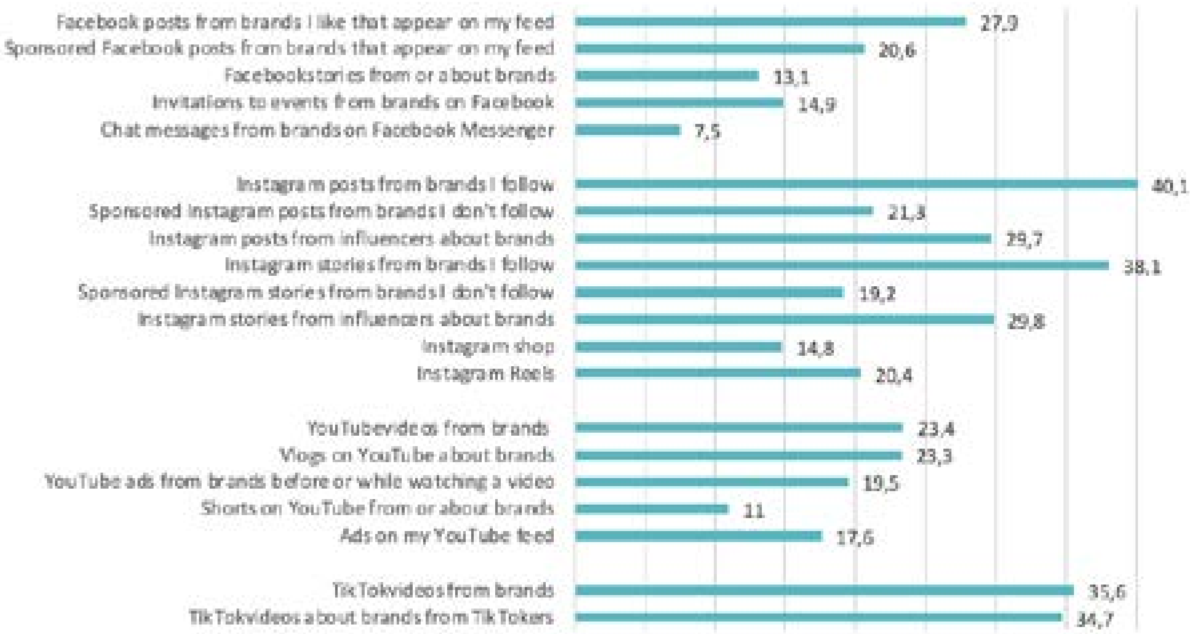
- Regardless of which social media channel they consume, young people prefer content from brands they engage with themselves. More specifically, they prefer organic branded content, either from brands or influencers they started following themselves, rather than paid ads that appear in their feeds.
- Instagram remains the more natural habitat for brand communication, but especially TikTok provides increased opportunities.
- Youngsters are particularly open to brand-related content on TikTok. While last year, only 14% of the Belgian TikTok users was open to brand-related content on TikTok, both from brands and creators, this year, the percentages increased to 35.6% and 34.7% respectively. From our qualitative research, we also learned that ads are considered less disturbing on Tiktok. The fact that these ads blend in the TikTok style and/or are easily skippable might play a role in this (slightly) more positive attitude towards branded content on this channel.

> *"Daar kom ik ook wel eens reclame tegen, maar dat is redelijk weinig, dus stoor ik me daar niet aan" (woman, 18 years)*

> *"Op TikTok is er minder reclame en je kan meteen doorscrollen dus minder storend." (man, 18 years)*

> *"Oui je vois des publicités sur TikTok et ça me gêne pas spécialement mais je les passe directement. Les pubs qui me dérange le plus sont quand on joue à un jeu, ça c'est vraiment chiant. » (woman, 19 years)*

- On Facebook, posts are preferred over Facebook stories.



| Figure 15: Overview of the social media features young Belgian social media users prefer for brand-related content (in %)

The social media channels most frequently adopted by retailers for advertising purposes are Instagram and Facebook. The approach on these channels differs in the sense that **Instagram is more frequently used for inspirational content, while Facebook lends itself more to commercial, push advertising strategies.**

> *"Voor de meer commerciële boodschappen gebruiken we Facebook, omdat men het delen van pusherige content over loyaliteitsprogramma's daar iets meer toelaat. Met Instagram gaan we voornamelijk proberen te inspireren." (Charlotte Van Der Perre, content expert Delhaize)*

We noticed a **preference for inspirational content**, both among youngsters as among brands. **Raising awareness** was the most frequently mentioned objective among the interviewees. Yet, difficult times may force brands in a more commercial direction:

> *"Corona heeft ervoor gezorgd dat wij ons meer op het commerciële moesten richten na de opstart van onze webshop. Voor corona ging het commercieel heel goed en konden we ons meer richten op inspirationele content, nu hebben we een balans gevonden tussen de twee." (Jules Thys, digital content manager Foodmaker)*

Moreover, retail brands indicate that it has become very difficult to reach their target audience in an organic way. **Brands cannot achieve their targets on social media without paid advertising.**

> *"Je kunt tegenwoordig eigenlijk niet meer viraal gaan of organisch groeien binnen die groepen (jongeren). Facebook en Instagram - Instragram valt nog mee - maar Facebook is helemaal dicht, is heel buying driven. Eigenlijk kopen wij onze media. Daar kan je bijna niet onderuit." (Vic Dresen, marketing manager BurgerBrands)*

> *"Organisch op Facebook posten is een beetje passé. We posten zeker nog organisch voor bepaalde dingen en als we de doelgroep die ons op Facebook volgt willen bereiken. Facebook is overall nogal een crowded place geworden, gaan wij er altijd een beetje geld achter zetten, al is het maar om de boodschap bij de juiste persoon te laten aankomen. Dat hoeft geen bakken geld te zijn, een kleine push kan al voldoende zijn.*

> *Om gewoon gezien te worden, is het op Facebook niet meer mogelijk om puur organisch te werken. […]. Voor Instagram is dat een beetje dubbel, omdat Instagram ook een beetje neigt naar Facebook op dat vlak: gezien worden heeft een beetje geld nodig omdat onze following op Instagram nog niet zo groot is. Instagram is een heel ander doelplatform dan Facebook en evolueert meer naar inspirationele en organische content, en daarom picken en chosen we daar een beetje. We kijken wat een extra push kan gebruiken. Of van welk standpunt vertrekken we? We zijn daarin iets selectiever op Instagram." (Liese Schaeken, social media coordinator MediaMarkt)*

Still, brands are wary on being too commercial on social media:

> *"Een advertentie doen we nooit op onze feed maar met een dark post. Zo zie je op onze Facebookpagina enkel inspirationele content." (Stephanie Jamin, content marketeer Signify)*

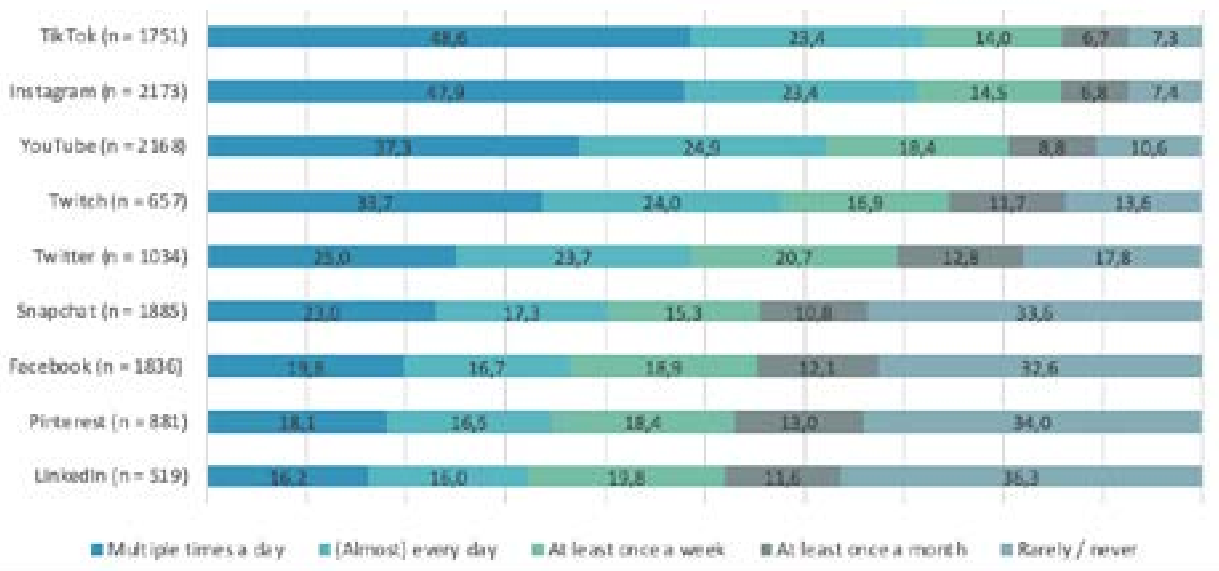
Influencer marketing

Influencer marketing: state of play

Influencer marketing remains an **effective tool for brand communication** and is **growing slowly**:

- 86,6% of the Belgian youngsters follow influencers on social media. This is an increase of 1.5% percent points compared to last year.
- The mean number of influencers youngsters claim to follow, is 10.
- 10% considers themselves a social media influencer, however, 1.8% of them did not cooperate with any brand in the past year.
- There is a steady increase in the number of Flemish youngsters who follow at least one influencer. In 2019, 80.6% followed at least one influencer, in 2020 this was 84,9% and in 2021 this number increased to 88.2%.
- In the South, the number of youngsters who follow at least one influencer remains at the same level. In 2021 84.3% indicated to follow at least one influencer, in 2020 this was 85.4%.
- Instagram is the most popular channel to follow influencers, followed by YouTube, TikTok, Snapchat and Facebook.

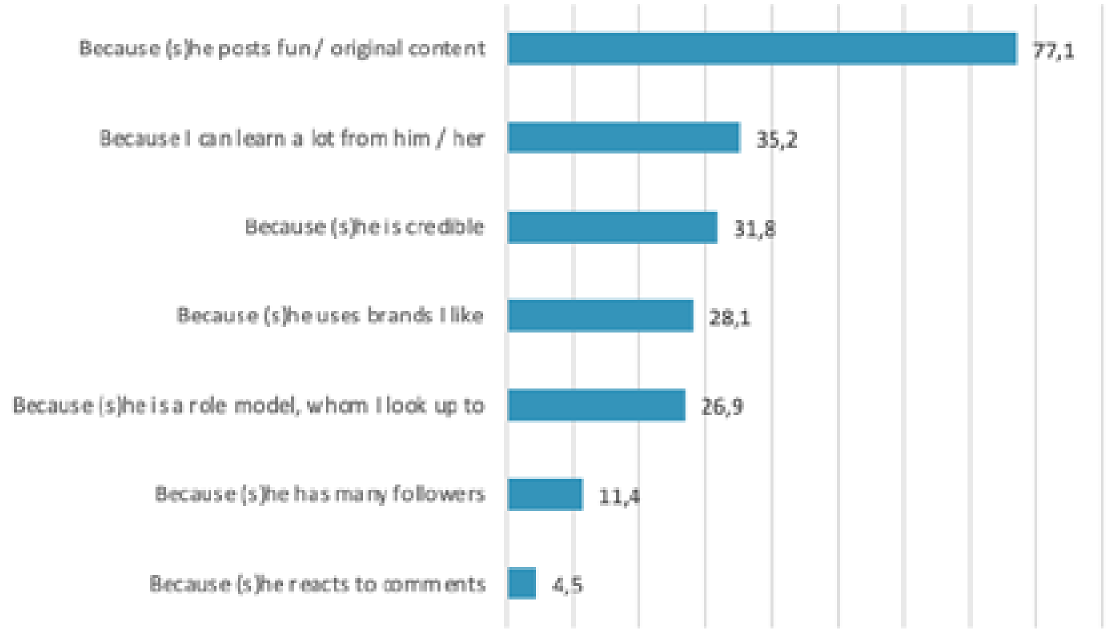
Figure 16 provides an overview of how often Belgian young people encounter influencers on different social media channels. Only frequent users of the respective social medium (= participants who use the medium at least 1x per week or more) were included in the analysis. From this analysis, it appears that TikTok, Instagram and YouTube are the channels where youngsters are currently the most frequently exposed to influencer-related content. It is striking that despite the lower number of Twitch users, frequent users often come into contact with influencers on this channel.



| Figure 16: Exposure to influencers by social medium (in % within user groups)

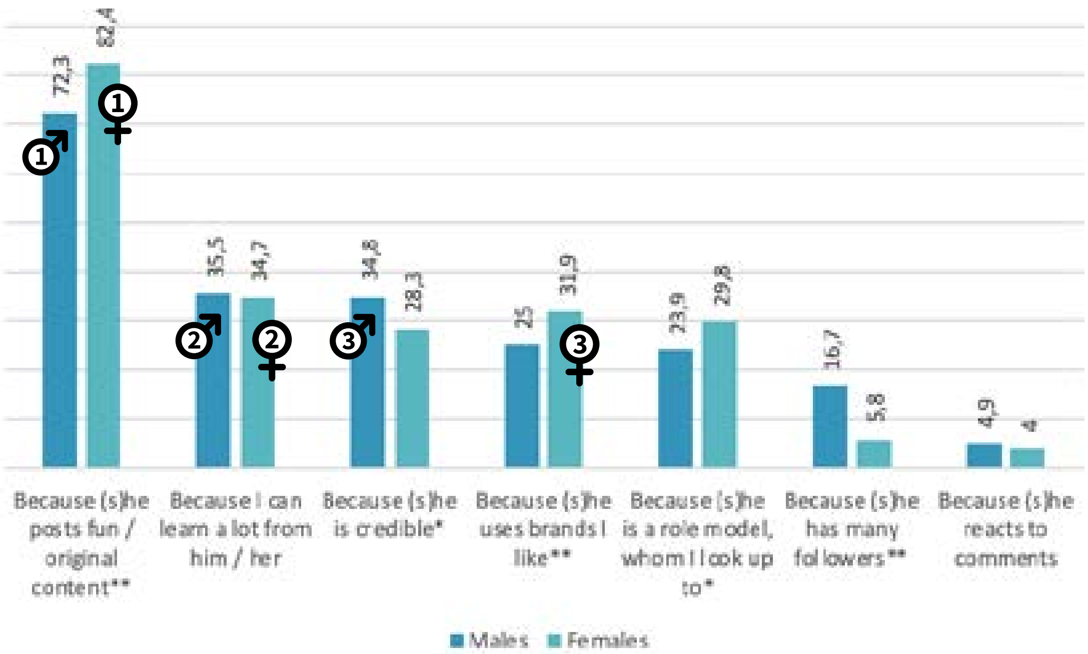
Key drivers for following influencers on social media

Similar to last year, irrespective of age, region and gender, the key driver for following influencers is their **fun and original content**. The possibility to learn from them and their credibility are next in line as drivers.



| Figure 17: Main reasons to follow influencers (in %; n = 2132)

The third most important reason to follow influencers, is different for males and females. For males, this is 'because (s)he is credible', while for females, reason number three is 'because (s)he uses brands I like'. Among females, this reason was selected by 31.9%, compared to 25% among males (p < .001). The figure below provides more information. Significant differences between males and females are marked with * (p < .05) and ** (p < .001).



| Figure 18: Main reasons to follow influencers : comparison males and females (in %; n = 2132)

Both among **Dutch-speaking** (79.9%) and **French-speaking youngsters** (73%), reason no. 1 to follow influencers is entertainment. For French-speaking youngsters, ‘because (s)he is credible’ (36.6%) and ‘because I can learn a lot from him / her’ (36.5%) are the main motivators hereafter. For Dutch-speaking youngsters, the second most important reason to follow influencers is ‘because I can learn a lot from him / her’ (34.5%) and the third most important reason is ‘because (s)he uses brands I like’ (31.1%).
The percentage of youngsters who picked ‘because (s)he uses brands I like’ as a key driver to follow influencers differed quite a big deal among Dutch- (31.1%) and French-speaking youngsters (23.2%, p <.001)).
The table below provides more details:

	Dutch			French		
	Males	**Females**	**Total**	**Males**	**Females**	**Total**
Because (s)he reacts to comments	4,8%	2%	3,6%	5%	6,9%	6%
Because (s)he has many followers*	13,5%	5,2%	9,7%	22,1%	6,7%	14,3%
Because (s)he is a role model, whom I look up to*	24,6%	30,3%	27,4%	22,6%	29,2%	26,1%
Because (s)he uses brands I like**	27,5%	35,8%	31,1%	20,7%	26,1%	23,1%
Because (s)he is credible*	30,5%	26,7%	28,9%	42,3%	30,7%	36,6%
Because I can learn a lot from him / her.	35,8%	32,6%	34,4%	35,1%	37,7%	36,5%
Because (s)he posts fun / original content**	75,8%	84%	79,7%	66,2%	80%	73%

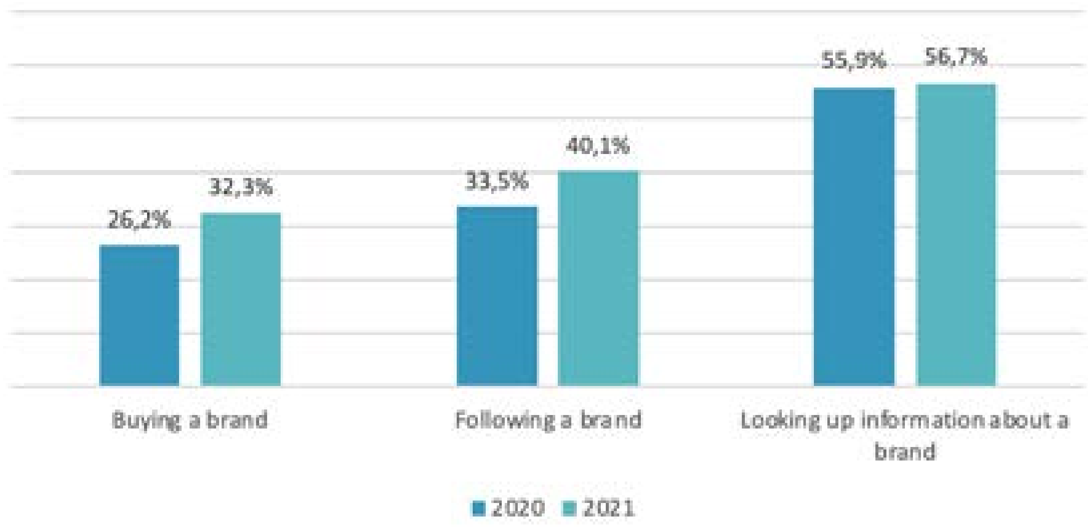
Table 5: Main reasons to follow influencers according to gender and language

Looking into **age differences**, it is worth noting that to 16-18 year-olds, entertainment (87.1%) is even more important as a driver to follow influencers, compared to older age groups (75.2% among 19-21 year-olds and 70.3% among 22-24 year-olds; p <.001). Furthermore, credibility (41.1%) appeared to be way more important to 22-24 year-olds, compared to younger age groups (24.6% among 16-18 year-olds and 29.1% among 19-21 year-olds; p <.001).

The impact of influencer marketing on youngsters is greater than ever

Youngsters who follow influencers, are convinced it’s a **good idea for brands to involve influencers for commercial purposes** (74%). This holds both for Dutch-speaking (72.9%) and French-speaking (75.9%) youngsters. There is no remarkable difference compared to last year.

Collaboration with influencers also pays off for brands. To measure conversion, we probed for the extent to which young people looked up more information about a brand, started following a brand, and started using a service or bought something an influencer promoted. Figure 19 provides an overview of these percentages based on the number of youngsters that follow at least one influencer.



| Figure 19: Influencer marketing and conversion among youngsters

32.3% of the young people who follow influencers indicate that they have bought, 40.1% indicated that they started following a brand and 56.7% indicated they looked up more information about a brand, due to an influencer in the past three months. These numbers have increased compared to last year, which indicates that **the impact of influencer marketing is still growing among Belgian youngsters.**

Furthermore, our analysis showed that conversion to purchase is slightly higher among French-speaking (34.5%) vs. Dutch-speaking (30.5%) youngsters.

French-speaking 16-24 year old's are also more inclined to follow brands (44.4%) compared to Dutch-speaking (37.5%) youngsters.

Remarkable, while in 2020, females appeared to be more susceptible to influencer marketing compared to males, we notice a catching-up movement among men this year. Fewer females indicated that they started following a brand due to an influencer, in comparison with last year. The following table provides more details:

	Males		**Females**	
	2020	2021	2020	2021
Buying a brand	29,6%	34,9%	29,8%	36,9%
Following a brand	22,3%	41,8%	39,0%	29,7%
Looking up information about a brand	49,8%	54,5%	59,5%	61,1%

| Table 6: Conversion of influencer marketing: comparison 2020-2021 according to gender

Authenticity in influencer marketing is key

Advertising literacy towards influencer marketing appears to be high among youngsters. Youngsters are aware about the fact that influencers promote brands out of commercial motives. They consider influencers as a marketing tool. According to youngsters, the aim of influencers is to reach as many people as possible and advertise products.

> *"Influencers zijn mensen die veel volgers hebben op sociale media en door hun sociale media kanaal ook geld verdienen." (woman, 18 years)*

> *"...dat zijn mensen die van hun passe (schmink, reizen, mode) hun beroep maken. Ook mensen die bekend worden en zo ook geld verdienen door bepaalde merken te promoten." (woman 24 years)*

> *" Selon moi, un influenceur c'est quelqu'un qui partage sa vie avec sa communauté ainsi que des codes promos. Il est payé pour faire de la pub de différents produits car il a un nombre important d'abonnés." (woman, 21 years)*

> *" Ceux qui ont beaucoup d'abonnés et qui gagnent de l'argent en publiant sur Instagram 🙂. Qui se mettent en scène, qui font de la pub pour certains produits." (woman, 23 years)*

> *"Je dirais que c'est quelqu'un qui a des comptes sur des réseaux sociaux et qui est basé sur un thème (faire rire , …) mais aussi promouvoir des produits de certaines marques. Et inciter ses abonnés à en acheter!" (man, 16 years)*

This strong association with a more commercial end-objective yields with some youngsters in a more negative or more critical perception of influencers. Based on our qualitative survey, this negative attitude is expressed more for youngsters in the South than the North.

> *"Avant je suivais quelques influenceurs de télé réalité mais maintenant de moins en moins car leur story n'est plus que du contenu pour des codes promos et souvent ils présentent des produits qu'ils n'utilisent même pas ou ils ne savent même pas le fonctionnement du produit." (woman, 21 years)*

In this respect, youngsters attach a lot of importance to authenticity and transparency when it comes to influencer marketing.

> *"Soms promoten zij wel producten en ik vind dat goed, zolang er duidelijk bij gezegd wordt dat het een advertentie is. Ik heb 1 product van het bedrijf van een influencer gekocht, omdat ik dat sowieso wou en dat product van haar zag er leuk uit." (woman, 18 years)*

> *"Wanneer ze oprecht overkomen ben ik eerder geneigd hun verhaal uit te luisteren, ook al interesseert het onderwerp me niet zo. Oprecht enthousiasme is aanstekelijk en vind ik leuk om te kijken." (man, 24 years)*

> *"D'ailleurs celles-ci (les petites YouTubeuses) sont beaucoup plus authentiques dans leur vidéo, ce qui manque cruellement dans les vidéos des Grands YouTubeurs car ça se sent que chez eux tout est calculé pour encore plus grandir à travers les réseaux." (woman, 18 years)*

> *"Les bons influenceurs qui sont ceux qui sont honnêtes, naturels et transparents envers les followers." (woman, 18 years)*

To conclude, **young people attach a lot of importance to influencers being transparent about the commercial nature of their posts** (69% believes this is important). For Flanders, this remains as important as last year.

| Figure 20: Importance attached to disclosing the commercial nature of sponsored posts (n = 2127)

How brands leverage influencer marketing in 2022

All retail brands we spoke to, embraced influencer marketing as part of their strategies. As the impact of social media on young audiences (and beyond) grows, so does the reach and marketing power of influencers. Influencer marketing has developed over the last few years to a fully-fledged marketing strategy and has become an industry in itself, referred to as 'the creator economy". Influencers are well-aware of their value for brands and brands are well-aware of the impact influencers have on their target audiences. **The main question among brands is no longer whether or not use it, but how to use it.**

Some brands use a **PR-based approach**, aiming for publicity. For example, they work with **seedings** where (after permission) they send packages with free products to influencers or they organize **exclusive events** that are so engaging that influencers spontaneously share their experiences with their followers.

> *"We hebben 2 tot 4 keer per jaar een PR-event waarop we een groep influencers uitnodigen. We vertellen wat over onze nieuwe merkproducten die ze dan ook mogen proberen. Ze krijgen ook een gevulde goodiebag mee naar huis. Deze events zijn er echt voor influencers die houden van ons merk en wij maken daarom geen specifieke afspraken over het aantal posts/stories. Anders dan bij een betaalde samenwerking kan je dit ook niet verwachten. Dit moet in balans zijn." (Lotje Wijnstra, marketing manager Kruidvat)*

Most of the time however, brands use a **campaign-based approach** and partner with influencers to promote their brands and products.

Brands put a lot of effort into **finding the right influencer**. Influencers need to fit perfectly with the brand's image and the intended campaign. This process is sometimes facilitated by apps such as Influo, or outsourced to agencies who deliver a shortlist based on the brand's briefing. For instance:

> *"We hebben een bureau dat meestal een shortlist maakt op basis van het DNA van de influencer ten opzichte van het merk. Past dat? Past dat niet? Wat zijn de kosten? Dus die dingen. Maar wij kunnen wel bijvoorbeeld zelf aankaarten van "hij /zij staat niet op de lijst, neem daar eens contact mee op". Dus we hebben wel inspraak zelf ook, maar het is wel ons agentschap dat daar de eerste lichting heeft." (Vic Dresen, marketing manager BurgerBrands)*

Concerning the demanded content, most **brands evolved to handing over creative control to influencers** and limit their briefing to a number of general guidelines (e.g. brand prominence) and expectations (e.g. number of posts). Brands aim **for authentic stories and creative formats** when partnering with influencers.

> *"Authenticiteit en spontaniteit verdwijnen door te veel richtlijnen." (Margo Vansteenkiste, digital marketeer LolaLiza).*

Most brands provide **financial payment** to influencers they partner with. The size and specific nature of the compensation depends on the influencer's reach and expectations in terms of content to be delivered.

> *"Vergoedingen bekijken we case-to-case, afhankelijk van wat de influencer ons kan bieden en wat wij ervoor over hebben. Hoe langer influencermarketing bestaat en hoe groter influencermarketing wordt, hoe minder je wel kan vermijden dat daar een financiële geste tegenover staat. Dat kan financieel zijn, waardebonnen of producten. Veel grote influencers, met een groter bereik, hebben daar echt hun job van gemaakt en die moeten ook hun rekeningen betalen." (Liese Schaeken, social media coordinator MediaMarkt)*

> *"We werken met grotere en kleinere influncers. Iemand met een klein aantal volgers zorgt voor minder bereik en daar staan gratis producten qua kosten in verhouding met wat je terugkrijgt aan awareness. Zijn ze wat groter, kunnen we dat met een vergoeding doen." (Lotje Wijnstra, marketing manager Kruidvat)*

> *"We bepalen de vergoeding steeds in overleg met de influencer en in functie van de gewenste content. Wanneer we influencers vragen om content te creëren voor onze eigen kanalen, of om bijvoorbeeld een IKEA Live Shopping mee te presenteren, staat er veelal een hogere vergoeding tegenover dan wanneer de influencer content louter op diens persoonlijke account gedeeld wordt." (Jelena Janssens, commercial PR specialist IKEA)*

Verifying the effectiveness of influencer marketing remains an important challenge for brands. To **track results**, some brands ask for screenshots with performance metrics from influencers. Another strategy affiliate marketing: when an influencer shares a specific discount code with his / her followers, results are very straightforward.

> *"Als wij betaalde samenwerkingen hebben, vragen we om de resultaten te delen en spreken we vooraf een x-aantal posts en stories af. Daar hebben we specifieke afspraken over met de influencers." (Lotje Wijnstra, marketing manager Kruidvat)*

> *"We kunnen dat bijvoorbeeld doen door codes te genereren. Wij hebben dat al eens gedaan voor een andere campagne, waarbij je zegt: "Je krijgt zoveel korting als je deze code gebruikt." We merken wel dat die codes worden gebruikt. Je kan ook kijken hoe vaak er op een link wordt geklikt." (Lisa Vanhaeren, external communications coordinator Delhaize)*

Also, **brands are confident that if they picked the right influencers, they will deliver**.

> *"We hebben vertrouwen in onze ambassadeurs. Als we de juiste mensen kiezen - wat meestal wel het geval is - en de content goed bij ons past, levert dat sowieso wel op. Het is ook allemaal binnen de merkbekendheidsfase, dat is sowieso moeilijker om te meten. Maar je ziet meteen of een post van een ambassador veel nieuwe volgers oplevert of niet." (Jules Thys, digital content manager Foodmaker)*

> *"We richten ons vaak tot eenzelfde profielen, mensen waarvan we weten dat IKEA hen nauw aan het hart ligt en die het een tof merk vinden, zodat we weten dat de content die ze gaan maken, tof gaat zijn." (Jelena Janssens, commercial PR specialist IKEA)*

To brands, the most important assets of influencers **are their perceived authenticity and credibility**. The latter also means that brands are wary of influencers that are too commercial and act as an endorser for too many brands.

> *"Bij influencer samenwerkingen vind ik het allerbelangrijkst dat het geloofwaardig is en dat de influencer echt fan is van ons merk. Dat is belangrijker dan het bereik. Dit heb ik liever dan iemand met heel veel volgers die van de ene naar de andere retailer gaat." (Lotje Wijnstra, marketing manager Kruidvat)*

> *"Influencers die niet authentiek zijn of gewoon gaan van 'we krijgen producten of we krijgen er geld voor en we zullen er rap iets mee doen'. Dat zijn niet die waarmee dat wij willen samenwerken. Dus die authenticiteit is een heel belangrijke." (Veerle De Taeye, marketing & communication manager CASA)*

Hence, an emerging trend is the **shift to long-term, rather than one-off partnerships**. In these long-term partnerships, influencers act as **ambassadors** who stand behind the brand, its products and values for the full 100%. Brands demand **integrity** and a certain **exclusivity**. Long-term partnerships also lead to more sustainable payment models for influencers.

> *"Wij vonden het ambassadeurschap iets heel belangrijks om te doen. Vooral ook die lange termijn samenwerking. Je merkt dat heel veel bloggers en influencers dit beginnen te doen. Het zijn niet meer die one based projecten, maar op lange termijn met een merk - waar zij ook achter staan - samenwerken. […] De lange termijn samenwerking is iets wat de laatste tijd heel erg naar voor komt. Je merkt ook dat influencermarketing aan het professionaliseren is. Vroeger deden wij alles PR-based en bijna geen betaalde samenwerkingen. Nu merken we dat dat meer en meer naar voren komt, wat ook wel logisch is aangezien heel veel influencers daar hun job van hebben gemaakt. Als zij content creëren is het ook wel normaal dat zij daarvoor vergoed worden." (Lisa Vanhaeren, external communications coordinator Delhaize)*

> *"We vinden het belangrijk dat een influencer - en dan spreek ik over de kleine - niet de ene week voor Mediamarkt een post doet en volgende week voor de concurrent. Een sterke brandconnectie krijg je enkel in een langere samenwerking. We gaan daar meer naar kijken in de toekomst, omdat we willen vermijden dat we één uit 100 worden. […] Er is niet zoiets als een brand exclusiviteitscontract dat ze moeten ondertekenen." (Liese Schaeken, social media coordinator MediaMarkt)*

> *"We werken nu met een soort van ambassadors club. Dus dat is per land een selectie van influencers die echt fan moeten zijn van het merk en waar we ook meer een wisselwerkingrelatie mee hebben. Dus in de plaats van dat ze een keer een post doen, maar dan de volgende dag over een ander merk posten, willen we dat er een meer kwaliteitsvolle samenwerking is." (Veerle De Taeye, marketing & communication manager CASA)*

Along with the trend towards long-term partnerships we noticed that a few brands are taking steps towards **managing influencer marketing in-house**, rather than outsourcing it. The main reasons for in-housing are control, more authentic content due to closer relationships with the brand, and cost reduction.

> *"Het oprichten en beheren van een eigen ambassadors club heeft veel voordelen. We hebben een veel closere band met de influencers, waardoor we ze meer kunnen vragen en ze ook meer geneigd zijn om spontaan te posten over ons merk, ook al zijn ze dat niet verplicht. Als we hen bijvoorbeeld een pakketje kleren opsturen, zetten ze dit vaak in hun story omdat ze er oprecht blij mee zijn, wat ervoor zorgt dat het heel geloofwaardig overkomt. De authenticiteit is ook groter, omdat ze niet de ene week LolaLiza promoten en de volgende week bijvoorbeeld een ander fashionbrand. Wij kiezen influencers die bij ons merk passen en de influencers kiezen ook echt voor ons." (Margot Vansteenkiste en Annelien Alaerts, LolaLiza, digital marketeer en marketing- manager LolaLiza)*

> *"Influencer marketingbureaus zijn heel interessant, maar je bent daardoor wel iets meer de controle kwijt: je riskeert foutjes of zaken worden verkeerd gecommuniceerd." (Liese Schaeken, social media coordinator MediaMarkt)*

To conclude, brands that are active both in Flanders as in Wallonia, often mentioned that the **number of influencers in Wallonia is limited** and that there is a **major influence of France**. French-speaking youngsters follow a lot of French influencers and influencers in Wallonia at the same time may have a large following in France.

> *"De taal is het grootste verschil. Daar blijft het niet bij, want Waalse influencers hebben een heel grote following in Frankrijk. […] hierdoor gaan we awareness creëren bij mensen die daar geen boodschap aan hebben en niets mee kunnen. Gaan we ons geld daar dan wel insteken als we 75 procent mensen bereiken die er niets aan hebben en 25 procent die er wel iets aan hebben? Die afweging moeten maken: wat gaan we dan voorstellen? Wat vinden wij belangrijk? Daar is de keuze voor influencers nog een tikkeltje specifieker en nog een beetje complexer. Daarnaast - en dat is de laatste tijd beter en beter geworden - liep Wallonië een beetje achter qua influencers. Na corona zijn ze wel bijgebeend en zit er een serieuze following in." (Liese Schaeken, social media coordinator MediaMarkt)*

> *"Er is een hele kleine pool aan Belgische Franstalige influencers. Het is heel moeilijk te zien welke influencers we dan kunnen gebruiken. Want Frankrijk, ja, dan bereiken we zoveel mensen die niet bij ons komen shoppen. Dat is dus helemaal niet interessant. Het is een challenge om goede Belgische Franstalige influencers te vinden." (Charlotte Van der Perre, content expert Delhaize)*

Besides commercial impact, influencers also have a broader impact on youngsters' lifestyle

Influencers not only have an important impact on youngsters' brand-related behaviour, they also impact youngsters' lifestyle in a broader sense.

As such, 23.9% of the Belgian youngsters says an influencer already motivated them to dress differently. For female 16-24 year-olds, this percentage increases to 34% (compared to 14.5% for males). Moreover, the impact of influencers on youngsters' **clothing style** seems to decrease as they grow older (29.2% for 16-18 y/o, 22.8% for 19-21 y/o, 20.2% for 22-24 y/o).

> *"Ongezonde producten promoten vind ik niet goed, maar bv. kledij vind ik niet zo erg. Soms zelf leuk omdat ik op die manier inspiratie krijg." (woman, 18 years)*

> *" Oui clairement parce que en plus d'influencer nos goûts musicaux. Leurs styles vestimentaires qu'on voit sur leurs photos nous inspirent aussi. Quand on voit une star qui porte une couleur originale (par ex), ça aura d'office un impact sur la vision de la couleur, comment le porter, avec quoi l'associer... ." (woman, 19 years)*

Also, influencers motivate youngsters to **game** (13.7%), to **invest** (10.9%) or more general to **start a new hobby** (9.6%). Male youngsters are more often inspired by an influencer to game (31.4%) and to invest (23.3%), compared to females (resp. 9.8% and 10.1%).

Furthermore, influencers have an important impact on youngsters' **eating and exercising behaviour**. 24.8% of the Belgian 16-24 year-olds says an influencer has already motivated them to exercise more and 23.6% was prompted to eat more healthy. There are no significant differences between males and females concerning exercise behaviour, but females are even more inspired by influencers to eat more healthy (41.3% compared to 32.7% among males).

> *"Ce que je fais aussi en ce moment, je suis un programme de sport fait par une fille et c'est gratuit et chaque jour je dois regarder des vidéos pour faire mes exercices et je trouve ça assez chouette comme concept. Oui c'est complètement gratuit et elle gagne sa vie en faisant de vidéos, elle donne aussi des conseils nutrition." (woman, 19 years)*

To conclude, we gauged for the impact of influencers' on youngsters coping with **mental health**. 15.8% of the Belgian youngsters was motivated by an influencer to pay more attention to their mental health, such that they would feel better about themselves and 6.7% was inspired to seek psychological help. Looking into differences between males and females, we found that females are even more inclined to pay attention to their mental health (33.7%) and seek psychological help (13.3%) due to an influencer, compared to males (resp. 15.6% and 7.5%). Influencers seem to have a larger impact on 16-18 year-olds youngsters' intention to pay attention to their mental health (28.7% for 16-18 y/o, 21.5% for 19-21 y/o, 23.7% for 22-24 y/o).

Giveaways

Most youngsters are rather positive or very positive about giveaways on social media (prizes, products, ... that are given away for free by brands). This is confirmed by our qualitative interviews.

> *“Ik vind dat een goede manier om meer aandacht te creëren, als het eerlijk verloopt. Ik neem eraan deel als de producten interessant zijn en ik niet veel moeite moet doen om deel te nemen.” (woman 18 years)*

> *“Sur Facebook, j’aime bien les concours (auxquels je participe parfois), les photos, … Principalement pour gagner des vêtements ou des bons 😊” (woman, 23 years)*

About one third of the Belgian youngsters are neutral about this strategy. These figures are similar compared to last year. See the figure below for an overview:

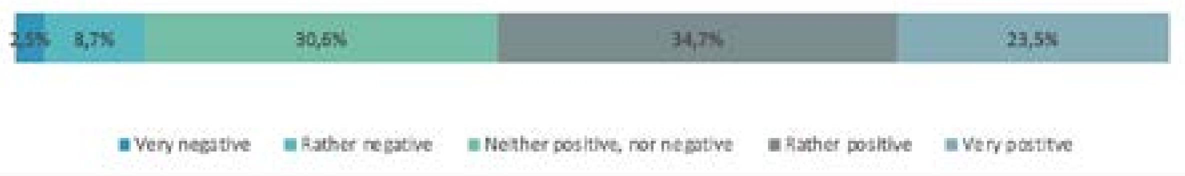


Figure 21: Belgian youngsters’ attitude towards giveaways (n = 2451)

Further analyses showed that on average, women (M = 3.61) tend to be slightly less positive about giveaways on social media compared to men (M = 3.70, $p < .05$). Moreover, French-speaking youngsters tend to be more positive about giveaways on social media (M = 3.73) compared to Dutch-speaking youngsters (M = 3.61; $p < .05$).

When comparing different age groups, 16-18 year-olds on average tend to be slightly less positive about giveaways on social media (M = 3.51), compared to older age groups (M_{19-21} = 3.67; M_{22-24} = 3.78; $p < .05$). About 51% of the 16-18 year-olds is (very) positive about giveaways, compared to 59.1 % among 19-21 year-olds and 63.3% among 22-24 year-olds.

The retailers we spoke to, did not spontaneously mention giveaways as part of their social media strategies. One interviewee mentioned that they deliberately include less competition elements in their strategy:

> *“Vroeger werkten wij enorm met wedstrijden, de typische dingen: deel, tag, win enzovoort. Een hele grote verandering is denk ik het feit dat jongeren op Instagram heel weinig geëngageerd zijn. Als wij een post plaatsen met “Reageer met je favoriete emoji”, doen zij dat niet. Dat werkt niet. Ik merk vooral dat jongeren op Instagram voyeurs zijn. Ze komen wel kijken, zien wat er gebeurt en zijn heel kritisch. Dus als er iets opstaat wat hen niet aanstaat, gaan ze daar zeker op reageren. Maar actief deelnemen en reageren op uw content gebeurt veel minder.” (Charlotte Van der Perre, content expert Delhaize)*

Podcasts

Podcasts may become a promising platform for brands

55.5% of the Belgian 16-24 year-olds, listens to podcasts. Males listen more often to podcasts, compared to females (p <.001).

Figure 22: How often do Belgian youngsters listen to podcasts? (in %, n = 2111)

Of the youngsters who listen to podcasts regularly (at least once a week), 28.9% believes it's a good idea for brands to cooperate with existing podcasts and 25.5% believes it's a good idea for brands to create their own podcast. 25.8% explicitly states it's not a good idea for brands to incorporate podcasting as a branding strategy, while 12.8% is not sure on this matter.

Podcasts appear to be a promising platform for brands in terms of conversion, as 25.8% of the youngsters who listen to podcasts looked for more information about a brand due to a podcast and 19.6% admits to have bought a product or service due to a podcast in the past three months.

Our qualitative research confirms that branded content or sponsoring is rather well accepted in a podcast environment (before or after the podcast) and not really disturbing. However some indicate that the fact that they are easily skippable helps to digest the promotion. When endorsing brands, authenticity also remains key.

> *“ Des vpn, des jeux mobiles, ... mais ces placements c›est souvent dû à leurs partenariats. Personnellement non car il faut bien qu›il gagne leur vie mais juste que j›aime pas avoir de la pub en plein milieux de mes podcasts.” (man, 21 years)*

> *“Ervoor of nadien stoort me niet omdat je door hebt dat het een reclame is., maar tijdens een podcast het merk erin vermelden en zo natuurlijk mogelijk te laten voorkomen vind ik niet zo fijn. Ik vind dat je als content creator gewoon eerlijk moet zijn of je ervoor betaald wordt of niet. Er zullen nog steeds mensen zijn die het product kopen hierdoor.” (woman, 18 years)*

> *“voornamelijk reclame voor hun eigen merch. Dat maakt me niet zo veel uit. Het moment dat ze producten van bedrijven beginnenn aanprijzen op een heel gemaakte manier, is meestal het moment dat ik afhaak en die podcast niet meer volg.” (man, 24 years)*

> *“ Oui assez souvent même mais ça fait partie du business et des fois c’est assez bien approché… Les jeux vidéos , les marques de vêtements sur les sites internet,… .” (man, 16 years)*

Today, podcasts are not (yet) used as a branding strategy that much, as 32.9% of the youngsters 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 youngsters get in touch with brands through podcasts (calculated among youngsters who listen to podcasts):

| Figure 23: How often do Belgian youngsters get in touch with brands through podcasts? (in%, n = 1193)

Most **brands** we talked with **acknowledge the potential of podcasts for marketing**, however it is not that much adopted yet. The main hesitation lies in the fact that **making a podcast takes a lot of time and effort, and that the return on investment is unclear**.

> *"Podcasts moet je goed aanpakken en in een goede podcast kruipt veel tijd en moeite. Onze ROI zien we daar momenteel nog niet in terug komen en pakken we dus pas later aan." (Joyce Breukink, content marketeer Shopopop)*

> *"We hebben er al heel veel over gepraat… Het enige wat mij een beetje tegenhoudt, is dat de productie vrij tijdsintensief is. En aflevering na aflevering moet het interessant blijven. Het is een zoektocht naar waar we consistent in kunnen zijn. Wat kunnen we terugbrengen? Waar luisteren mensen naar? Omdat het zo tijdsintensief is en we nog met die vraag zitten, zijn we er nog niet mee gestart maar wel al een aantal keer over gepraat." (Liese Schaeken, social media coordinator MediaMarkt)*

> *"Podcasts hebben we geprobeerd, maar dat was te intensief. De strategie om longform content te creëren in de vorm van een uur lang podcast en daar dan stukjes uithalen was heel tof, maar niet haalbaar om consistent te blijven doen op lange termijn. Het moet ook echt aanvoelen voor ons en we willen dit niet door een externe partij laten uitvoeren." (Jules Thys, digital content manager Foodmaker)*

A strategy that some brands did mention as offering opportunities, is **guest podcasting**. As such, key figures in the company contribute to an existing podcast as a guest speaker, showcase expertise and share knowledge:

> *"Onze CEO neemt soms actief deel aan podcasts. We krijgen daar aanvragen voor binnen en dan kijken we of het een meerwaarde is om daaraan mee te doen." (Jules Thys, digital content manager Foodmaker)*

Two of the brands we interviewed successfully integrated podcasting into their marketing strategies, namely Delhaize and IKEA, who started producing their own podcast. Both brands aim to bring engaging stories and use a corporate communication approach, rather than an advertising approach. **The aim is inspiring rather than selling**.

> *"Qua content proberen we interessante info mee te geven en is het niet de bedoeling om commerciële boodschappen mee te geven. Dat is een belangrijke. Met de podcasts die wij hebben gemaakt is het de bedoeling om mensen meer informatie te geven over: de Nutri-Score, de wijnbeurs en de lange geschiedenis die Delhaize heeft met wijn. Dat is onze insteek." (Lisa Vanhaeren, external communications coordinator Delhaize)*

> *"We merken vaak een perceptiekloof tussen wat mensen denken over een merk en wat een merk eigenlijk is. IKEA is veel meer dan betaalbaar leuk Scandinavisch design. Er zijn veel verhalen die mensen niet kennen. Om die perceptiekloof te dichten en onze unieke verhalen te vertellen, is de podcast het perfecte medium. Mensen luisteren naar podcasts om geïnspireerd te worden, leuke informatie te weten te komen. Wij pushen niet enkel wat wij belangrijk vinden, maar wat belangrijk is voor de maatschappij, voor iedereen. Wij willen vertellen dat we daar ook aan meewerken. Topics die we willen coveren zijn bijvoorbeeld sustainability, people and planet positive, hoe de productie verloopt, waarden binnen IKEA,… We wilden ook gewoon eens op een nieuwe, andere manier in contact komen met onze klanten, zodat zij nog een andere merkbeleving hebben en wij nog een andere touchpoint. Het voornaamste doel is inspireren." (Coralie Vangeel, content specialist IKEA).*

Both brands also emphasized the **importance of marketing communication** and media planning to promote their podcast.

Podcasts may serve as a source of inspiration to youngsters

6.7% of the Belgian youngsters says an influencer already motivated them to dress differently. Sometimes, podcasts may motivate youngsters to game (10.4%), to invest (13.2%) or more general to start a new hobby (10.8%).

Youngsters may find support in podcasts to improve their health. More specific, 244.3% of the Belgian 16 to 24 year-olds, says they started exercising more often due to a podcast and 22.7% was inspired to eat more healthy. As for mental health, 19.5% of the Belgian youngsters was motivated by a podcast to pay more attention to their mental health, such that they would feel better about themselves and 9.1% was inspired to seek psychological help.

> *“ Oui j’aime bien écouter surtout quand je rentre des cours et que je fais ma sieste, je m’endors sur les podcasts féministes (je les écoute jusqu’au bout). » (woman, 19 years)*

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 72.8% of the Belgian youngsters uses Spotify at least once a month, and 57.1% on a daily basis.

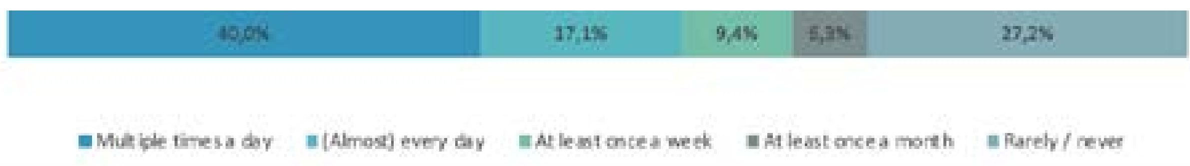


Figure 24: Use of Spotify among Belgian 16-24 year-olds (in %, n = 3291)

Furthermore, we asked youngsters who use the Spotify platform at least once a week (n = 2155), how often they used Spotify playlists and Spotify podcasts. It appears that in particular playlists are used regularly by youngsters, podcasts are used by less youngsters and less intensively. The table below provides an overview:

	Multiple times a day	(Almost) every day	At least once a week	At least once a month	Rarely / never
Spotify playlists	55.3	25.5	12.8	3.2	3.2
Spotify podcasts	8.8	9.9	20.5	19	41.8

Table 7: Use of Spotify playlists and podcasts among regular Spotify users (in %, n = 2155)

One brand we spoke with, adopted Spotify playlists as part of their marketing strategy, namely Foodmaker. They approach playlists as part of the experience they want to associate with their brand:

> *“De beleving rond het merk is belangrijk voor ons. Goede muziek is een beleving, net zoals lekker eten. We promoten een gezonde en actieve levensstijl, maar als je veel sport en gezond eet, mag je jezelf al eens belonen met een glas wijn en goede muziek. In die zin hebben wij voor Spotify gekozen om die levensstijl verder te inspireren.” (Jules Thys, digital content manager Foodmaker).*

Social media and brands: insights per retail sector

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

To avoid an overload of questions (and therefore also dropout of participants), respondents were randomly assigned to four of the nine surveyed sectors. For each of the assigned sectors, they were asked how frequently they were exposed to content related to the sector in question on social media and whether they wanted to be more often, equally or less often exposed to brand-related content from that sector. Only the frequent users of a social media channel (= at least 1x per week or more) were asked questions related to the respective social media channel.

KEY INSIGHTS

Regardless of the sector, **youngsters are most frequently exposed to brand-related content on Instagram, TikTok and YouTube**. Compared to last year, TikTok seems to have taken the place of Facebook. However, for most sectors, Facebook is still fourth in row and when we focus on weekly exposure rather than daily, Facebook remains in the top-3 channels where youngsters are exposed to branding. Only for the food and beverage sector, Facebook is part of the top 3 channels where youngsters are exposed to brand-related content.

There are **signs of saturation of brand-related content on social media**, in particular on the social media channels where youngsters are most frequently exposed to brand-related content (Instagram, TikTok, YouTube and Facebook).

We identified **minor opportunities for less-used, niche social media channels**, such as Twitch and LinkedIn. For the fashion, interior and DIY sector, there are also opportunities on Pinterest.

In general, French-speaking youngsters are more frequently confronted with brand-related content on social media and remarkably, they are also more open to more brand-related content on different social media channels. Especially in Flanders, we notice saturation.

The sectors youngsters are most frequently exposed to on social media are fashion and beauty. French-speaking youngsters are also frequently exposed the toys and games sector on social media.

In the following table, we indicated which social media channel has the largest reach among young Belgians per retail sector and which social media may offer opportunities. Reach is determined by (at least) daily exposure to brand-related content from each sector. Social media channels that offer opportunities are defined as social media channels where at least 25% of the regular users would like to be more frequently exposed to brand-related content from a particular sector. Only when this percentage exceeded the percentage of people who would like to be less often exposed to brand-related content from that sector, the channel was identified as offering an opportunity.

	Social media channels with the widest reach	**Opportunities**
Fashion	Instagram, TikTok, YouTube	Pinterest, LinkedIn
Health	Instagram, YouTube, TikTok	Twitch, LinkedIn, TikTok (South), Twitter (South)
Beauty	Instagram, TikTok, YouTube	
Electronics	YouTube, Instagram, TikTok	Twitch, LinkedIn
Interior	Instagram, YouTube, TikTok	Pinterest (North)
Do-It-Yourself (DIY)	YouTube, Instagram, TikTok	Twitch (North), Pinterest (North)
Garden and animal	Instagram, YouTube, TikTok	Twitch (South)
Toys and games	YouTube, Instagram, TikTok	Twitch
Food and beverage	Instagram, Facebook, YouTube	LinkedIn (South), Twitch (South)

Table 8: Which social medium to use to reach young Belgians per (retail)sector

In the paragraphs below, we developed specific insights per retail sector. Percentages that reflect **penetration** (= % that is exposed to brand-related content from the sector via different social media channels) are calculated based on the number of participants who were assigned to the sector in question. Percentages of non-frequent users of the social media channel in question are also reported. Percentages that reflect **evaluation** (= do these young people want to be more, less or equally exposed to brand-related content from the sector via different social media channels) are calculated for participants who were assigned to the sector in question and who are frequent users of the social media channel in question (= at least 1x per week or more).

Fashion

n = 1172

- The most important channel for branded content related to fashion is Instagram, followed by
- TikTok and YouTube. French-speaking youngsters are generally more frequently exposed to brand-related content related to fashion on social media compared to Dutch-speaking youngsters.
- There are some social media channels in relation to which young people expressed interest in more communication about, in particular Pinterest. Also on LinkedIn, youngsters would like to be more often exposed to fashion-related branded content, in particular French-speaking youngsters (41.3%). There are also limited opportunities on Twitch, Twitter and TikTok, in particular among French-speaking youngsters.

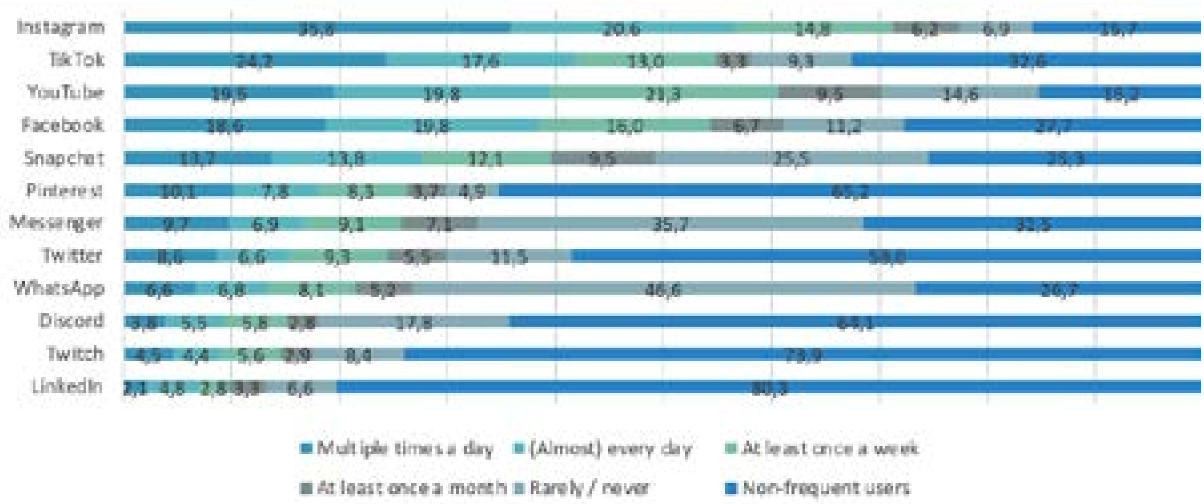


Figure 25: How often are young people exposed to brand-related content from the fashion sector via the following social media? (in %)

Figure 26: Do young people want to be more often, equally or less often exposed to brand-related content from the fashion sector? (in %)

Health

n = 1188

- The most important channels for branded content related to health are Instagram, YouTube and TikTok. Also for the health sector, TikTok replaced Facebook in the top 3. However, when we focus on weekly exposure, Facebook can considered number 3 instead of TikTok. The top 3 for French-speaking youngsters looks different: YouTube, Instagram, Snapchat (and TikTok on the fourth place).
- On Twitch and LinkedIn, there is some opportunity to communicate more often about the health sector, in particular among French-speaking youngsters (resp. 34,5% and 38%). In the South, there are also opportunities to reach youngsters on TikTok (30.6%) and Twitter (28,7%).

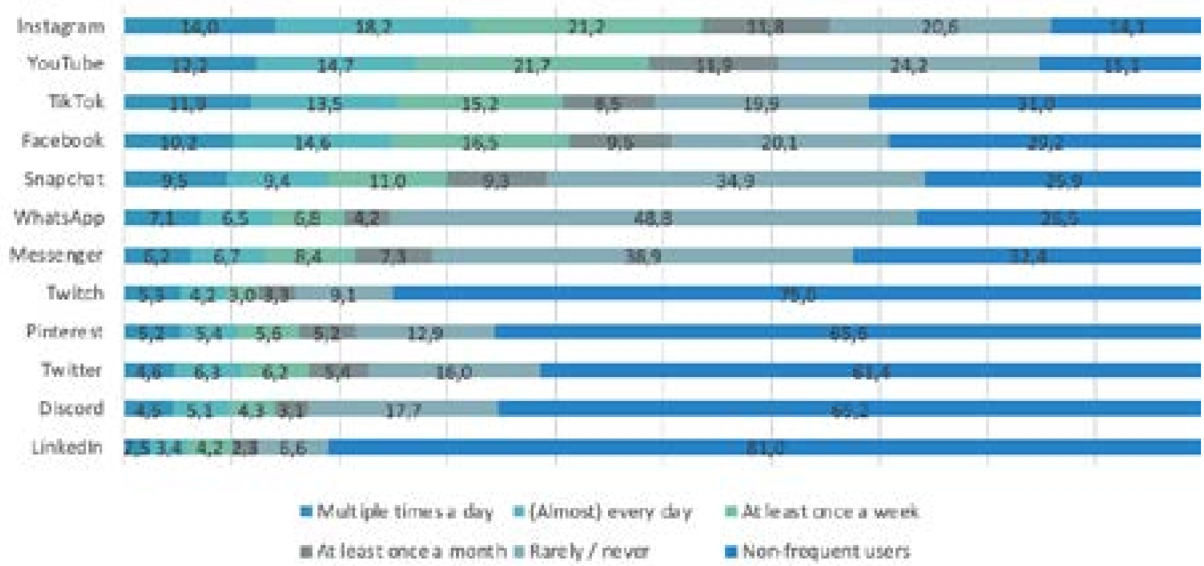


Figure 27: How often are young people exposed to brand-related content from the health sector via the following social media? (in %)

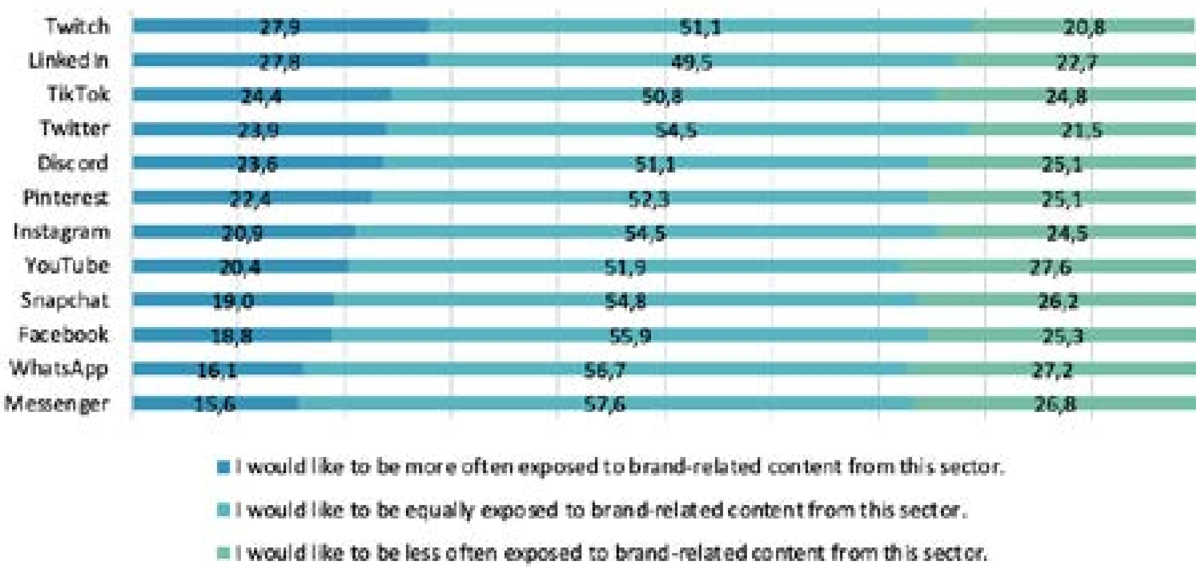


Figure 28: Do young people want to be more often, equally or less often exposed to brand-related content from the health sector? (in %)

Beauty

n = 1179

- When we focus on daily exposure, Instagram, TikTok and YouTube are the top 3 channels where youngsters are confronted with brand-related content from the beauty sector. When we look at weekly exposure, TikTok and YouTube switch positions. The top 3 is the same in the North and the South.
- Only on LinkedIn, there are some limited opportunities for the beauty sector to approach young people, in particular French-speaking (29.7%).

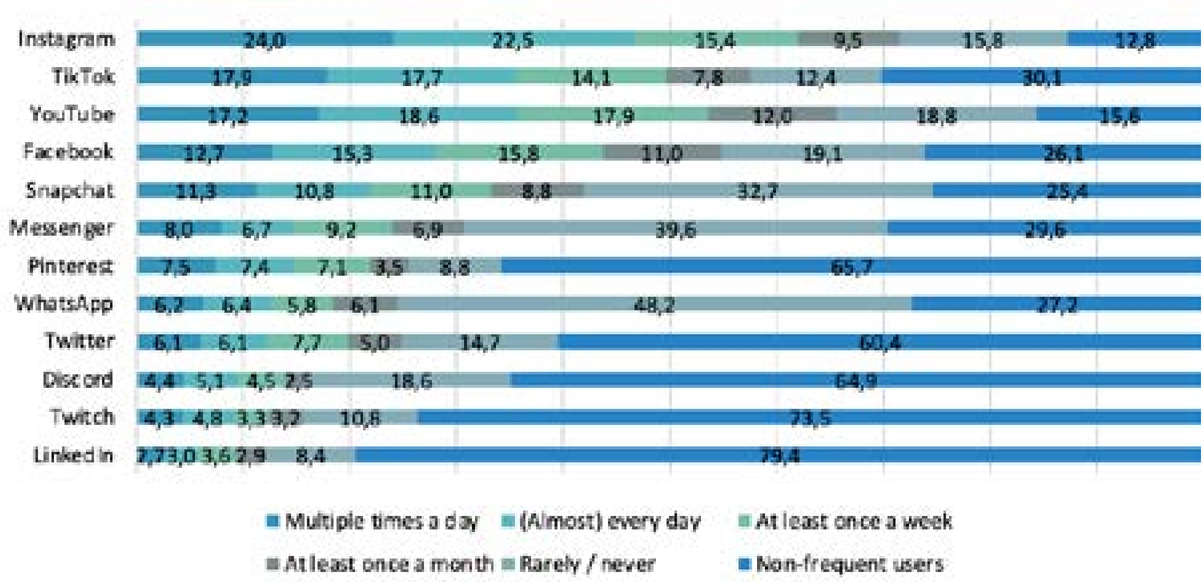


Figure 29: How often are young people exposed to brand-related content from the beauty sector via the following social media? (in %)

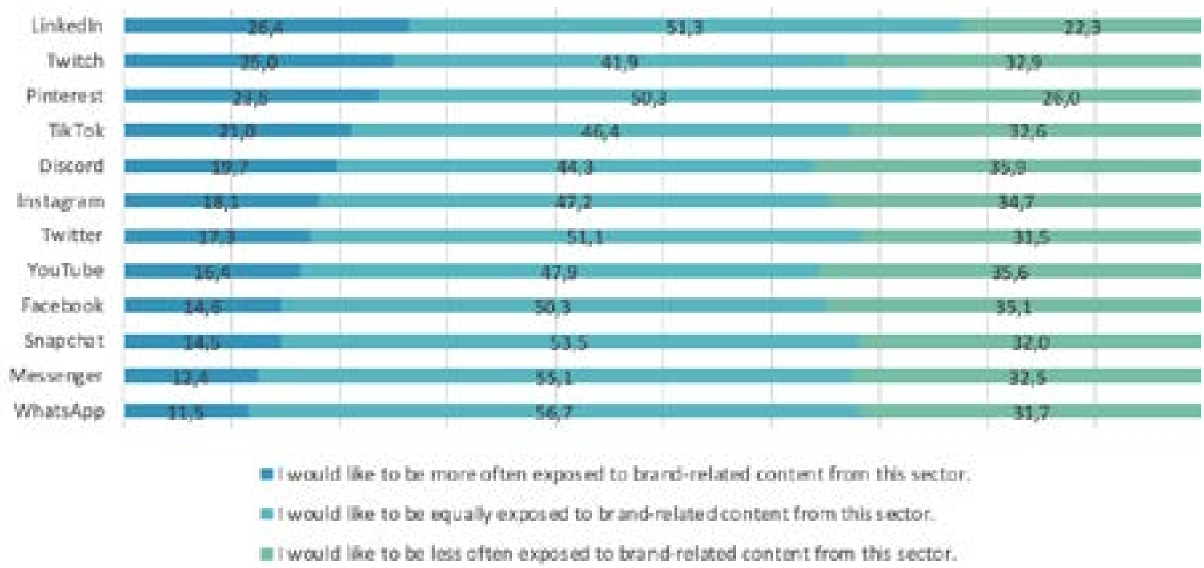


Figure 30: Do young people want to be more often, equally or less often exposed to brand-related content from the beauty sector? (in %)

Electronics

n = 1175

- On a daily basis, youngsters are most frequently exposed to brand-related content related to electronics on YouTube, Instagram and TikTok. In the South, the top 3 channels are Instagram, YouTube and Facebook. On a weekly basis, the top 3 is Instagram, YouTube and Facebook.
- There is some opportunity on Twitch and LinkedIn - for the electronics sector, especially in the South (resp. 31-3.8% and 31.8%).

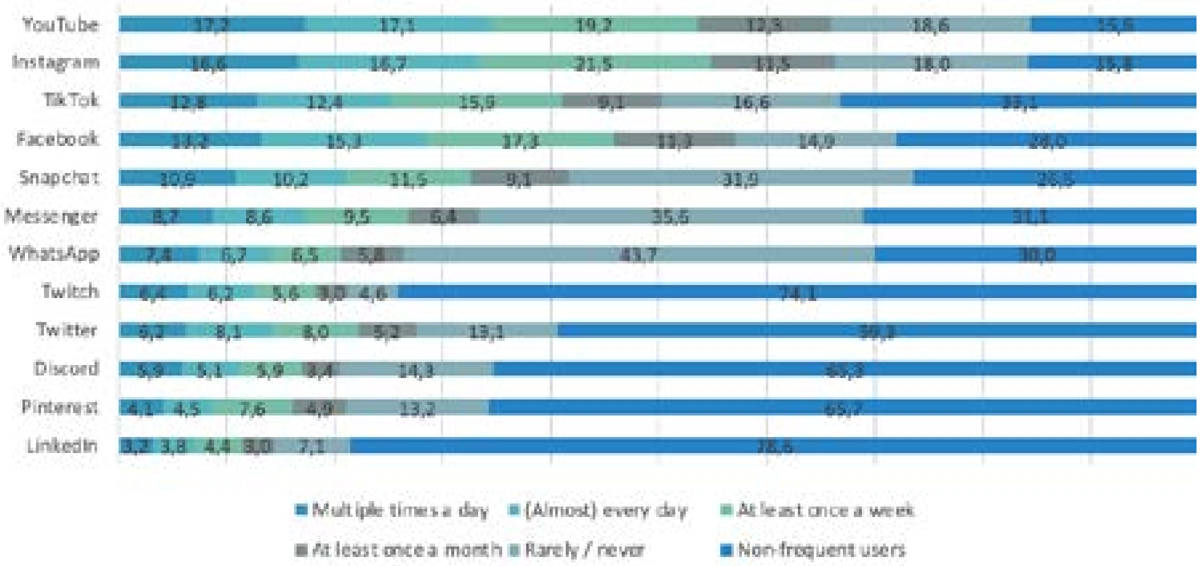


Figure 31: How often are young people exposed to brand-related content from the electronics sector via the following social media? (in %)

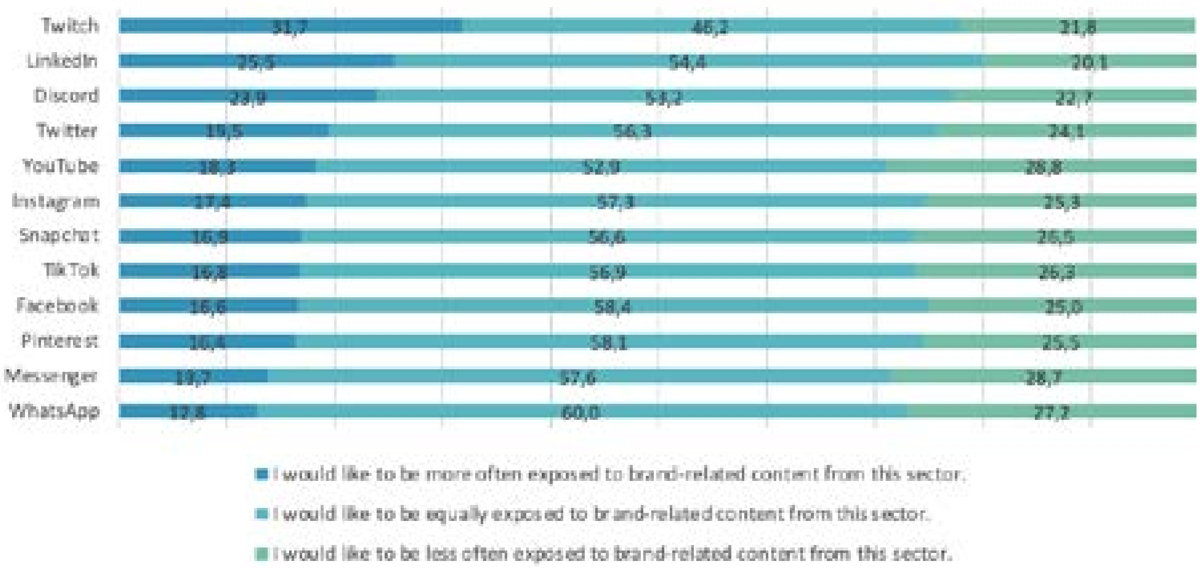


Figure 32: Do young people want to be more often, equally or less often exposed to brand-related content from the electronics sector? (in %)

Interior

n = 1170

- On a daily basis, youngsters are most frequently exposed to brand-related content related to interior on Instagram, YouTube and TikTok. On a weekly basis, Facebook takes place no. 3. In the South, the top 3 is Instagram, Facebook and YouTube (on a daily basis).
- Particularly on Pinterest, there are opportunities for the interior sector, foremost to reach Dutch-speaking youngsters (35.9%).

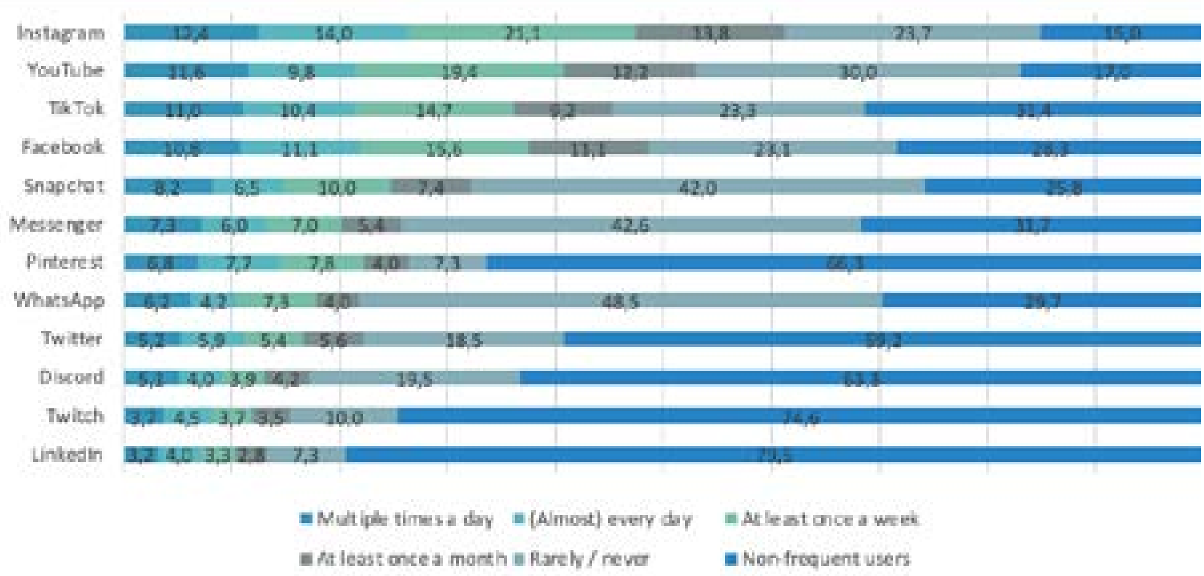


Figure 33: How often are young people exposed to brand-related content from the interior sector via the following social media? (in %)

Figure 34: Do young people want to be more often, equally or less often exposed to brand-related content from the interior sector? (in %)

Do-It-Yourself (DIY)

n = 1158

- YouTube, Instagram and TikTok are the main channels where youngsters are exposed to DIY-related content, both in the North and in the South.
- There are some limited opportunities for the DIY-sector to reach Dutch-speaking youngsters on Twitch (30%) and Pinterest (26.8%).

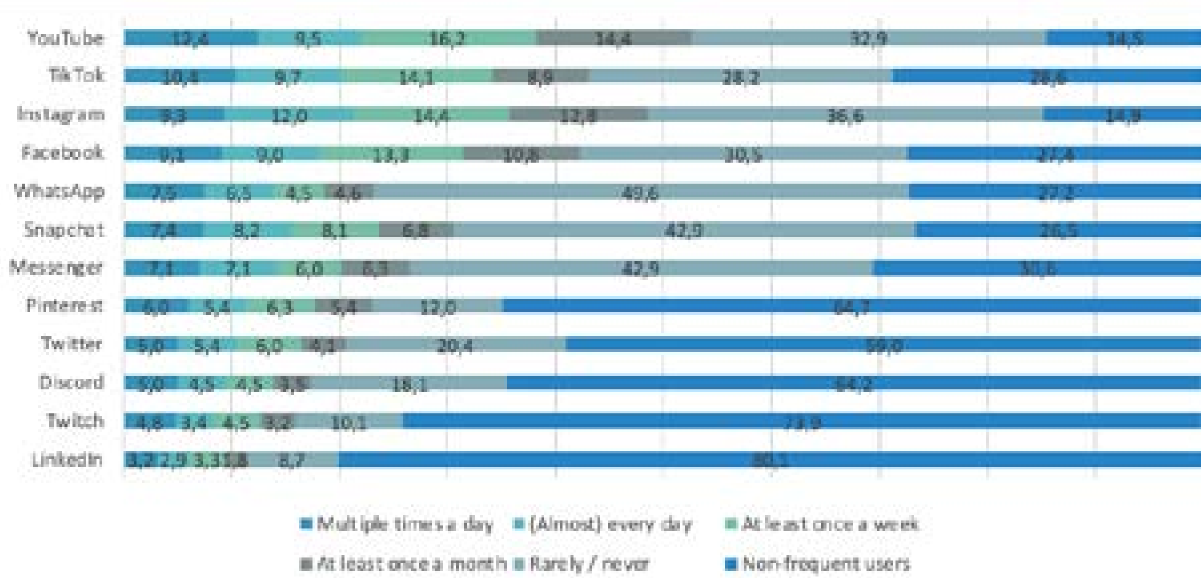


Figure 35: How often are young people exposed to brand-related content from the DIY sector via the following social media? (in %)

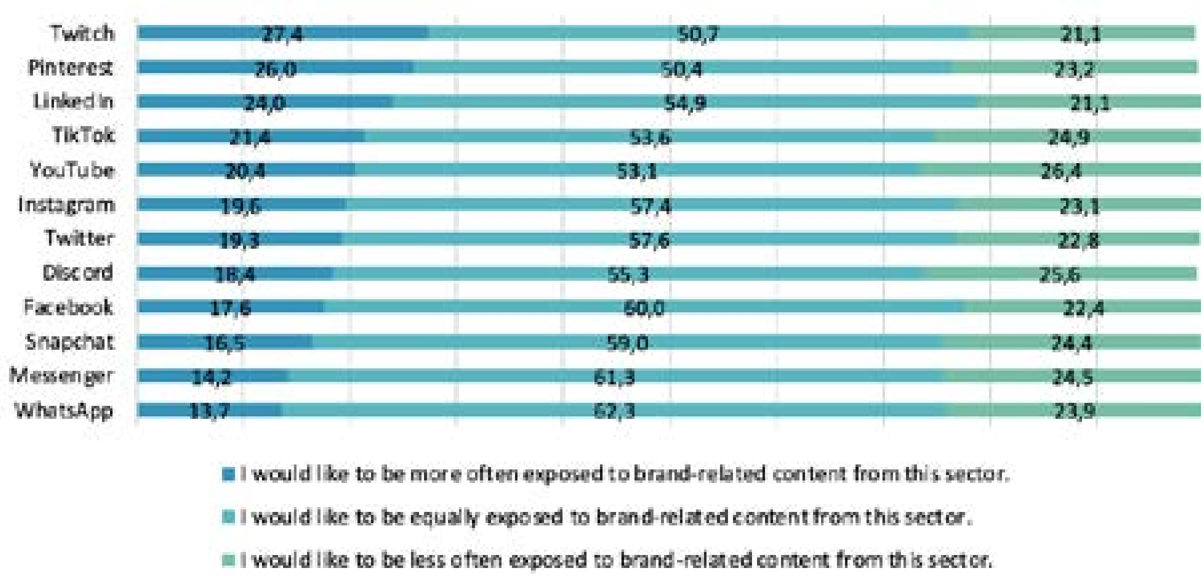


Figure 36: Do young people want to be more often, equally or less often exposed to brand-related content from the DIY sector? (in %)

Garden and animal

n = 1173

- Youngsters are not frequently exposed to brand-related content from the garden and animal sector on social media. The most important channels where they sometimes do, are Instagram, YouTube and TikTok, in line with their social media use.
- Twitch may offer some opportunity to reach youngsters, in particular French-speaking (29.2%)

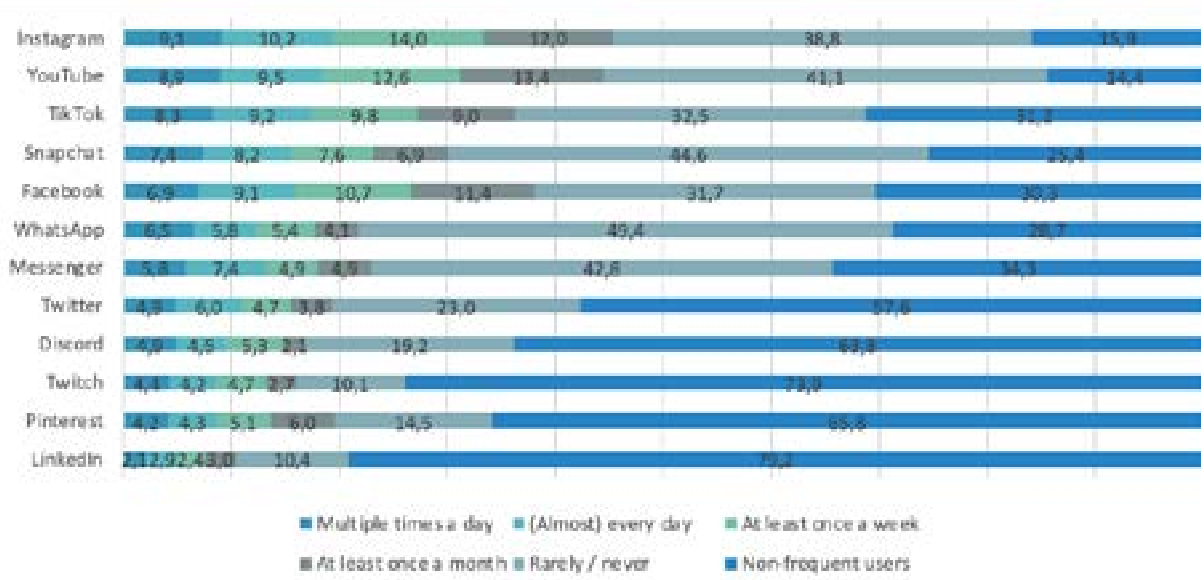


Figure 37: How often are young people exposed to brand-related content from the garden and animal sector via the following social media? (in %)

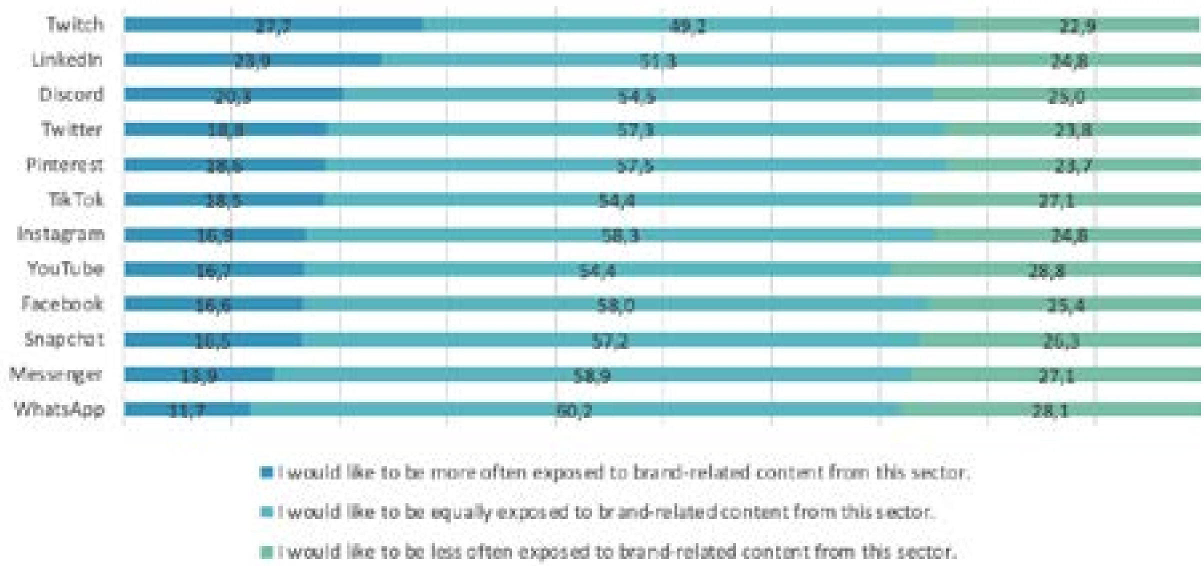


Figure 38: Do young people want to be more often, equally or less often exposed to brand-related content from the garden and animal sector? (in %)

Toys and games

n = 1149

- YouTube, Instagram and TikTok are the main channels where youngsters tend to be exposed to brand-related content related to toys and games, both in the North and in the South.

- Remarkably, of the surveyed French-speaking youngsters 45.3% is at least daily exposed to brand-related content related to toys and games on YouTube, 39.1% on Instagram and 29.7% on TikTok (among Dutch-speaking participants, this is respectively 25%, 20.9% and 20.8%).

- Twitch may offer some opportunity to reach youngsters, in particular French-speaking (29.2%)

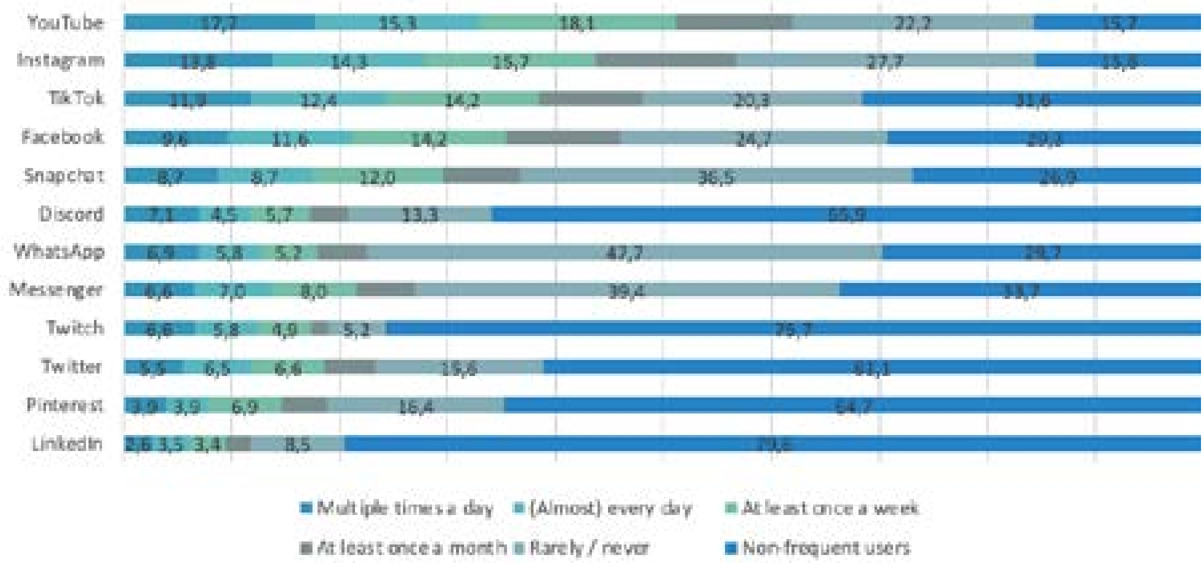


Figure 39: How often are young people exposed to brand-related content from the toys and games sector via the following social media? (in %)

Figure 40: Do young people want to be more often, equally or less often exposed to brand-related content from the toys and games sector? (in %)

Food and beverage

n = 1179

- Looking at daily or more frequent exposure, Instagram, Facebook and YouTube are the most important channels where youngsters are exposed to brand-related content from the food and beverage sector, closely followed by TikTok. Among French-speaking youngsters, the top 3 is slightly different: Instagram, YouTube and Facebook. Hence, compared to other sectors, Facebook is particularly used by the food and beverage sector to reach youngsters.
- No channels stand out that offer extra opportunities for the food and beverage sector, except for LinkedIn and Twitch for French-speaking youngsters (resp. 37.1% and 32.4%).

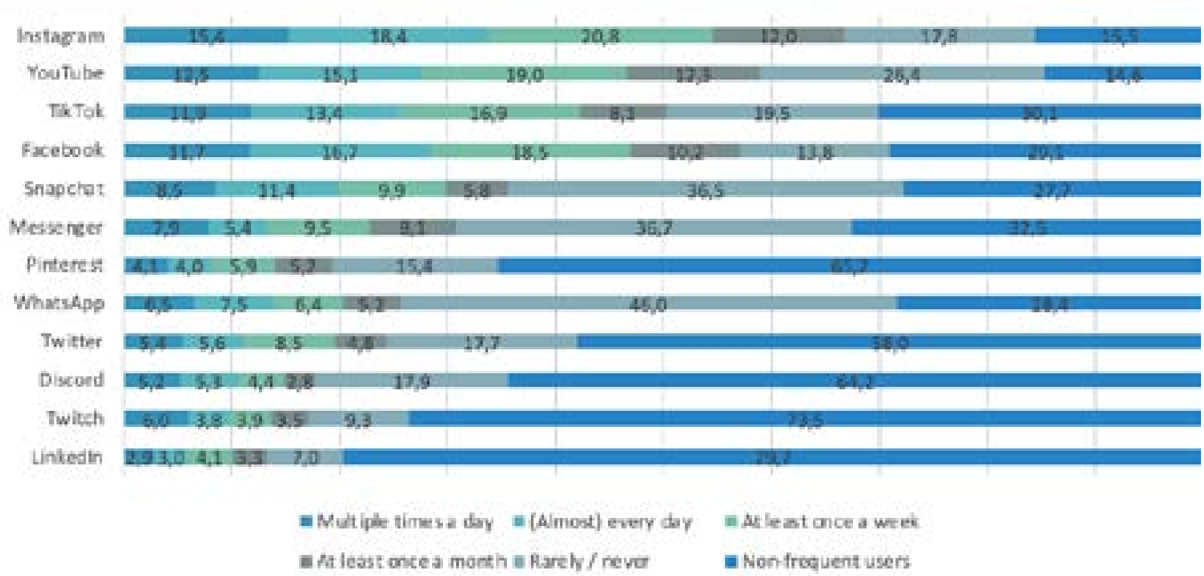


Figure 41: How often are young people exposed to brand-related content from the food and beverage sector via the following social media? (in %)

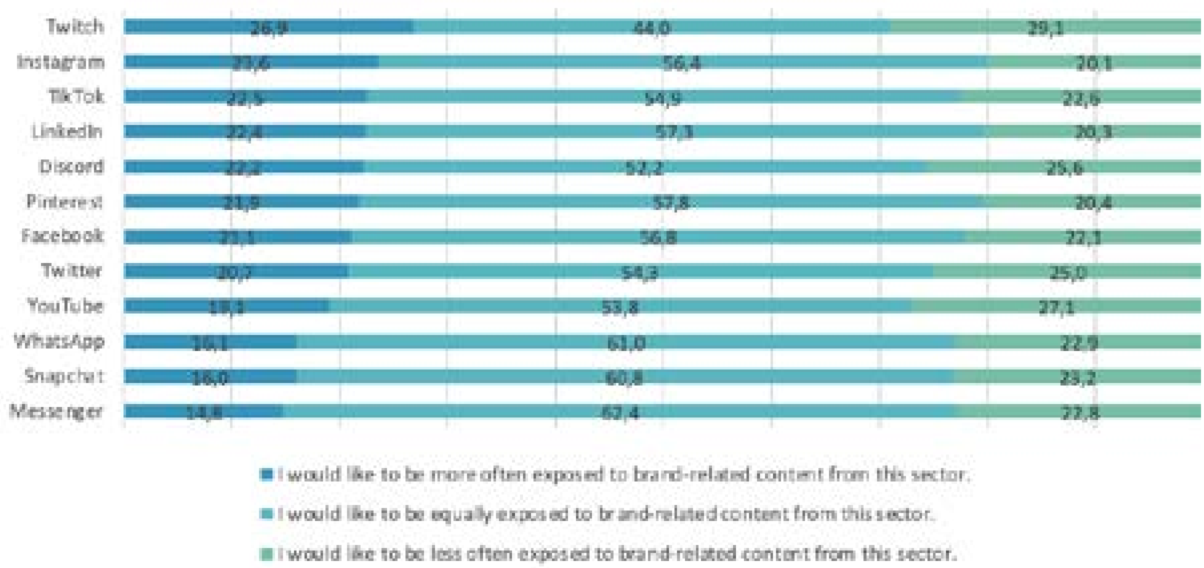


Figure 42: Do young people want to be more often, equally or less often exposed to brand-related content from the food and beverage sector? (in %)

Acknowledgements

The SMI-barometer (Social Media & Influencer marketing barometer), was first launched in Flanders in 2019, as an annual monitor of the adoption, use and evaluation of social media and influencer marketing among 16 to 24 year-olds. In 2020, we got the opportunity to expand the scope to entire Belgium. Hence, this the second year in a row we can provide insights, based on a representative national sample of Belgian youngsters. This was only possible thanks to the support of Comeos, The Belgian Federation for Commerce and Services. Comeos not only funded this research but was also a reliable partner in sharing their insights on the Belgian retail sector. Special thanks to Kristof Delhez, Wim Van Edom; Sander De Reu and the entire Comeos team!

We would like to thank all 3263 youngsters who participated in the survey and all 34 youngsters who agreed to talk to us about how they experience branding via social media and influencers.

Furthermore, insights from the marketing and social media managers of the different retail brands were crucial for this research report. Veerle De Taeye (CASA), Charlotte Van Der Perre (Delhaize), Lisa Vanhaeren (Delhaize), Coralie Vangeel (IKEA), Jelena Janssens (IKEA), Liese Schaeken (MediaMarkt), Joyce Breukink (Shopopop), Stephanie Jamin (Signify), Jules Thys (Foodmaker), Vic Dresen (BurgerBrands), Lotje Wijnstra (Kruidvat), Annelien Alaerts (LolaLiza) and Margot Vansteenkiste (LolaLiza): thanks for your enthusiasm, interesting insights and transparency.

Finally, we also want to thank our colleagues from the Artevelde University of Applied Sciences.

Thank you Annelore Deprez, Jeroen Naudts, Kristin Van Damme and Jelien Joye for your insightful feedback. Thank you Jens Van Lier for your help in conducting the survey. Thank you Stijn Anseel for graphically designing this report. Thank you Lotte Roobrouck and Melanie Verstockt for the organizational support, and Gregory Callebaut and Sarah Vandenbouhede for their communication support. Special thanks also to Esther van Tilburg, Ingrid Verbank, Mark Verbeke and colleagues in 'Research and Innovation' within the Artevelde University of Applied Sciences who facilitated this research project.

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

Marijke De Veirman, Ilse Bruwiere and Eveline Mollaert

May 2022

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

Sources

De Veirman, M. (2020). The fairytale of social media influencers: a multi-method approach to investigate the persuasiveness and ethical use of influencer marketing. Universiteit Gent. Faculteit Politieke en Sociale Wetenschappen.

Johnson, D.R. (2008). Using weights in the analysis of survey data [Powerpoint]. The Pennsylvania State University: Pennsylvania. Retrieved from: http://www.nyu.edu/classes/jackson/design.of.social.research/Readings/Johnson%20-%20Introduction%20to%20survey%20weights%20%28PRI%20version%29.pdf

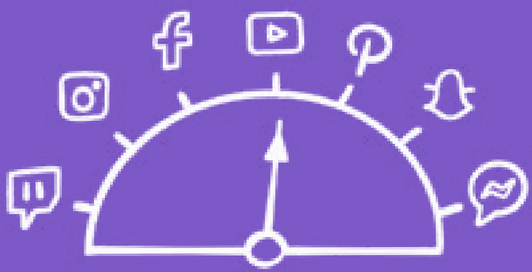
Keller, E., & Berry, J. (2003). The influentials. New York: Free Press.

Khamis, S., Ang, L., & Welling, R. (2016). Self-branding, 'micro-celebrity' and the rise of Social Media Influencers. Celebrity Studies, 8(2), 191-208. http://dx.doi.org/10.1080/19392397.2016.1218292

Lamarque, C. (2017) 'Influencers. Wie zijn ze? Waar vind je hen? En hoe ontsteken ze de vlam?' Leuven: Lannoo Campus.

Mander, J. (2017). Daily time spent on social networks rises to over 2 hours.
Global Web Index. Retrieved from https://blog.globalwebindex.net/chart-of-the-day/daily-time-spenton-social-networks/

Phua, J., Jin, Seunga, V. & Kim, Jihoon J. (2017). Uses and gratifications of social networking sites for bridging and bonding social capital: A comparison of Facebook, Twitter, Instagram, and Snapchat. Computers in Human Behavior, 72, 115-122.



SMI barometer 2021

Publication date: May 2022

Authors: Marijke De Veirman, Ilse Bruwiere and Eveline Mollaert

Layout: Stijn Anseel

This report was funded by 'Praktijkgericht Wetenschappelijk Onderzoek' (PWO) & Comeos.
You can consult and download this report online on **www.smibarometer.be**

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

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