

Press release

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Belgian consumers embrace sustainable tech habits and keep digital devices longer

Deloitte's Digital Consumer Trends report 2024 provides insight into the use of technology, AI, streaming and connectivity among Belgian consumers.

Brussels, Belgium – November 5, 2024

Today, Deloitte Belgium launches the latest edition of its *Digital Consumer Trends report*, which analyses the most recent developments in the digital behaviour of Belgian consumers. The study examines the use of digital devices, streaming services, generative AI applications and internet connectivity. These insights illustrate how technology is deeply rooted in the daily lives of Belgian consumers. This is revealed through the key insights - that consumers are using their devices for a longer periods of time, video streaming services are more popular than ever despite rising costs, and generative AI is becoming increasingly relevant, especially in work environments.

Some highlights from the report:

- **Consumers are using their digital devices for longer periods:** 46% of Belgians do not plan to buy a new electronic device in the next 12 months and 31% of Belgians have at least one second-hand device. This underlines an increasing trend towards more sustainable use of technology.
- **Streaming market shows recovery after previous decline:** 2024 has seen some growth in the number of streaming subscriptions, despite price fluctuations and increasing competition. 23% of Belgians took out a new video subscription last year, while 12% discontinued an existing subscription.
- **More than a third of working Belgians use generative AI (GenAI):** there has been strong growth in business use, particularly to generate ideas and search for information. Yet there is still a lack of active support for GenAI use in many organisations.
- **Rising satisfaction with internet quality:** 74% of Belgian consumers are satisfied with their internet connection, a slight improvement from last year. Demand for reliability and coverage outstrips that for speed, especially among younger generations who more often choose mobile broadband as their main connection.

Consumers use digital devices for longer and longer

Adoption of smartphones (94%), smart TVs (58%), wearables (37%) and voice-activated speakers (11%) reached a record high in 2024. This shows that smart devices are playing an increasingly important role in everyday life. In Belgium, the smartphone remains the most widely used electronic device; almost all respondents use their phones daily. Smart TVs in particular are gaining in popularity: 58% of respondents own a smart TV, and four in five also use the device daily. As a result, smart TVs are now more widely used than laptops and tablets. Adoption of VR headsets, on the other hand, remains stagnant. The size and high cost of VR headsets limit widespread adoption, despite the potential of VR/AR technology.

The survey also shows that almost half of consumers (46%) do not want to buy new devices in the next 12 months, which may indicate a trend towards more sustainable consumer behaviour. Those who do want to buy a device in the coming year are mainly considering a smartphone (14%).

"Demand for new features seems to be decreasing, as consumers are using their devices for longer, often saving old phones as a spare and increasingly opting for second-hand or refurbished devices. For example, 31% of Belgians have at least one second-hand device, with second-hand ownership particularly popular in Brussels (44%) and less so in Flanders (26%). This trend highlights the need for technology companies to respond to the demand for sustainable and circular products, for example by offering refurbishment and recycling programmes," said Vincent Fosty, Technology, Media & Telecommunications Industry Leader at Deloitte.

Streaming market recovers after first ever decline in 2023

The streaming subscription market shows resilience in 2024, with slight growth after a decline in 2023. 23% of Belgians took out a new video subscription in the past year, while 12% cancelled one. Price considerations, changing content preferences, and increasing competition between streaming services, especially from new entrants such as HBO Max, contribute to these ongoing subscription changes.

Half (49%) of Belgian consumers now have a video subscription, with Netflix enjoying a dominant position, as four in ten Belgians (39%) are currently subscribed to its platform. For music streaming, a third (33%) of Belgians have a subscription. Spotify leads the way with more than half of all music subscriptions. Although the growth in digital content consumption in Belgium is significant, the number of subscriptions remains lower than in countries such as the UK. There, as many as 75% of consumers subscribe to video streaming services (such as Netflix or Disney+) and half (50%) have music streaming subscriptions. These figures indicate growth potential for the Belgian market compared to countries with higher streaming penetration.

Due to measures to limit video streaming account sharing, 15% of Belgian consumers have stopped sharing their account with other households. This effect is particularly noticeable among younger users: about a third of respondents aged between 18 and 34 have stopped sharing accounts, while only 3-6% of older age groups have done so, indicating that younger people in particular were sharing accounts before the introduction of the measure. Despite these changes, the number of subscription cancellations has barely risen as households choose to subscribe themselves, limiting potential losses for streaming platforms.

More than one in three working Belgians use Gen AI

Gen AI is rapidly gaining ground in Belgium, with 58% of Belgians familiar with tools such as ChatGPT and Microsoft Copilot - up 14 percentage points from last year. Over a third of respondents have already used generative AI, with the technology being embraced mainly by young 'digital native' generations. In the workplace, we also see strong adoption, with 38% of users deploying AI for professional purposes, with tasks such as idea generation (41%) and information retrieval (41%) being the main uses.

Although generative AI offers significant productivity benefits, many users still experience barriers. Almost 40% use AI sporadically, often because of doubts about the reliability of answers (15%) and concerns about data privacy (11%). Moreover, half of respondents fear that AI will replace jobs in the future, while more than half say they have less confidence in AI-generated communication, such as emails or customer service interactions. Deloitte stresses the importance of governance and training to mitigate risks such as the 'hallucination bias' and to strengthen trust in this technology.

Rising satisfaction with internet quality among Belgian consumers

Overall, 74% of those surveyed say they are satisfied with their internet connection, up from 71% in 2023. It is notable that younger users tend to be more critical and have higher demands on their connection, but overall, internet quality in Belgium provides sufficient support for applications such as streaming and video calls. Interestingly, 62% of Belgians do not know their internet speed at home, with particularly low awareness among women (77%) and older people (73% among 65-75-year-olds). Belgians seem more concerned about reliability and coverage than speed, reinforcing the adoption of flexible alternatives such as mobile data as a main connection among younger generations. For 18- to 24-year-olds, data over mobile networks is an attractive alternative, mainly because of their mobility and need for affordable, flexible options.

Adoption of 5G is increasing, with 45% of Belgians currently using it, compared to 34% in 2023. Yet only two in five users experience a noticeable improvement over 4G.

Link to the full report: www.deloitte.com/be/digital-consumer-trends



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