Deloitte.

DIGITAL CONSUMER TRENDS 2024

Belgium

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ABOUT THE RESEARCH

DIGITAL CONSUMER TRENDS IS A MULTI-COUNTRY STUDY OF HOW PEOPLE ENGAGE WITH AND PURCHASE DIGITAL PRODUCTS. IT SPANS DEVICES, CONNECTIVITY, MEDIA AND EMERGING TECHNOLOGIES, AND IS NOW IN ITS FIFTEENTH YEAR OF PUBLICATION. IT WAS PREVIOUSLY KNOWN AS THE MOBILE CONSUMER SURVEY.

IN 2024, THE BELGIAN EDITION OF THIS RESEARCH COMPRISES A NATIONALLY REPRESENTATIVE SAMPLE OF 2,000 CONSUMERS, AGED 18-75, WEIGHTED FOR DEMOGRAPHICS SUCH AS AGE, GENDER, REGION, AND WORKING STATUS.

THE SURVEY TOOK PLACE IN JUNE 2024 AND WAS CONDUCTED BY AN INDEPENDENT RESEARCH ENTITY. QUESTIONS CITED IN THIS DOCUMENT MAY BE SIMPLIFIED FOR THE SAKE OF VISUALISATION.

Know your acronyms

Before you dive in, get to know some of the industry terms we used in this report:

Gen AI	Generative AI
VR	Virtual reality
AR	Augmented reality
FWA	Fixed wireless access
SVOD	Subscription video on demand
AVOD	Ad-supported video on demand
BVOD	Broadcaster video on demand
FAST	Free ad-supported streaming television

Key takeaways

Generative AI is on everyone’s lips, but is it at everyone's fingertips? The 2024 edition of the Digital Consumer Trends report highlights the rising popularity of generative AI in Belgium, driven by younger generations and increased professional use. In terms of hardware, consumers are delaying device upgrades and are sceptical of companies' green claims. Satisfaction with broadband internet connections remains high, while mobile broadband is emerging as an attractive alternative. Meanwhile, video and music streaming remain the most popular paid digital subscriptions, and are experiencing the first effects of password-sharing crackdowns.

GENERATIVE AI

58% of Belgians are aware of Gen AI tools, a significant increase compared to 2023

Awareness and usage of generative AI are on the rise, with 58% of Belgians aware of it and 35% having used it. This growth, though varying by demographic, is driven by the rise in professional use, where AI tools start to show potential in enhancing productivity. However, concerns remain around data privacy and the reliability of AI outputs.

DEVICES

46% of consumers do not plan to purchase a device in the next 12 months

Smart devices have reached record levels of adoption, while access to laptops and VR headsets is declining. This shift aligns with a growing trend of consumers keeping their devices longer. In fact, 60% of smartphones currently in use were purchased over a year ago, a figure that has risen since 2019. This indicates a shift in consumer preferences toward more sustainable tech behaviours.

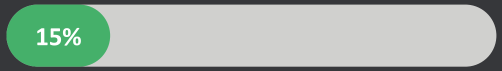
NETWORKS

74% of Belgians are satisfied with their broadband connection

Despite significant advancements in broadband technology, many users remain unaware of their home internet technology and speed, likely because it is now sufficient to handle everyday usage needs. In 2024, the key factors when considering alternative network providers are loyalty rewards, coverage, and faster speeds.

CONSUMPTION

15% of Belgians stopped sharing an SVOD subscription with another household



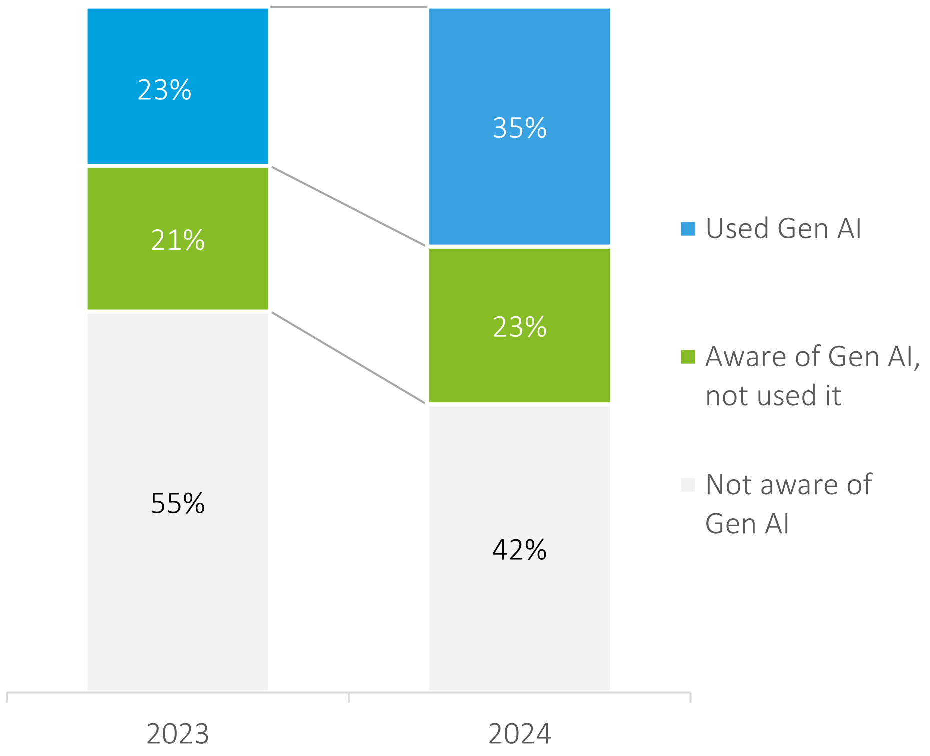
Subscriptions to video and music streaming platforms are growing, with 49% of Belgians subscribing to a video service and 33% to a music service. With churn remaining flat, this upturn can likely be attributed to the initial crackdown on password sharing. Limited purchasing power and a lack of perceived value remain the most cited reasons for churn in 2024.

GENERATIVE AI

Digital Consumer Trends 2024 survey is conducted with a purely nationally representative sample of people in Belgium. This may differ from similar reports in the market (e.g., Trust in generative AI), and results may vary accordingly. Any variance might also be attributed to different question wording and different question routing. As a result, direct comparisons between this section and alternative studies should be avoided.

Awareness and usage of generative AI tools are on the rise, with over a third of respondents having now used a Gen AI tool

Generative AI: Experience with Gen AI tools
Which statement best describes your experience with generative AI tools (e.g., ChatGPT, Microsoft Copilot)*



Generative AI (Gen AI) platforms are rapidly gaining traction in Belgium, with more than a third of citizens having used tools such as ChatGPT, Microsoft Copilot, or Snapchat MyAI in 2024.

Awareness of Gen AI is also on the rise, with 58% of consumers now familiar with these technologies—a 14 percentage-point increase from 2023. This growth is primarily driven by younger "digital natives" who naturally embrace new technologies.

Among those familiar with Generative AI, ChatGPT remains the leading player, with awareness rising from 40% in 2023 to 53% in 2024, far surpassing Microsoft's Copilot, which stands at 10%.

Weighted base: All respondents aged 18-75, 2023 (2,000), 2024 (2,000)
*Original questions: Which, if any, of the following generative AI tools are you aware of? / Which, if any, generative AI tools have you used?; Respondents were given a range of Gen AI tools to choose from, including “Another”. Those who were aware of generative AI but did not know if they had used it were aggregated into “Aware of Gen AI, not used it”
Source: Deloitte Digital Consumer Trends, BE, June 2024

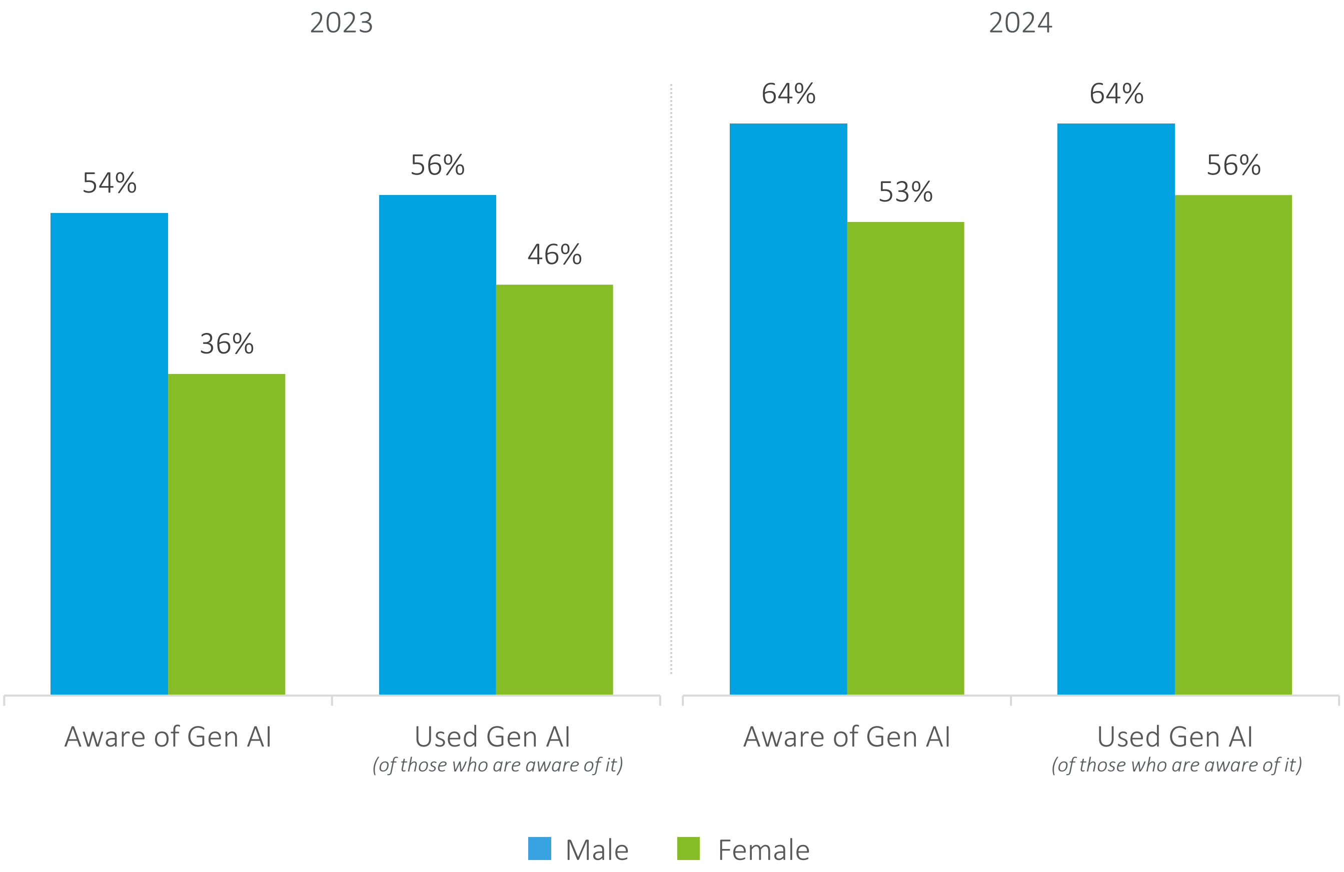
Men are more likely to be aware of and actively use generative AI tools, indicating a slight gender gap in technology adoption

Generative AI: Gender gap

Which statement best describes your experience with generative AI tools (e.g., ChatGPT, Microsoft Copilot)*

Overall, men demonstrate a higher level of engagement with generative AI tools, with 64% of the male population aware of these technologies, of which 64% have actively used them.

Although women have been slightly slower to adopt, they are rapidly closing the gap. Currently, 53% of the female population is aware of generative AI tools, and 56% of them have utilised them, with both figures increasing at a faster rate compared to men.



Weighted base: All respondents aged 18-75, 2023 (2,000), 2024 (2,000)

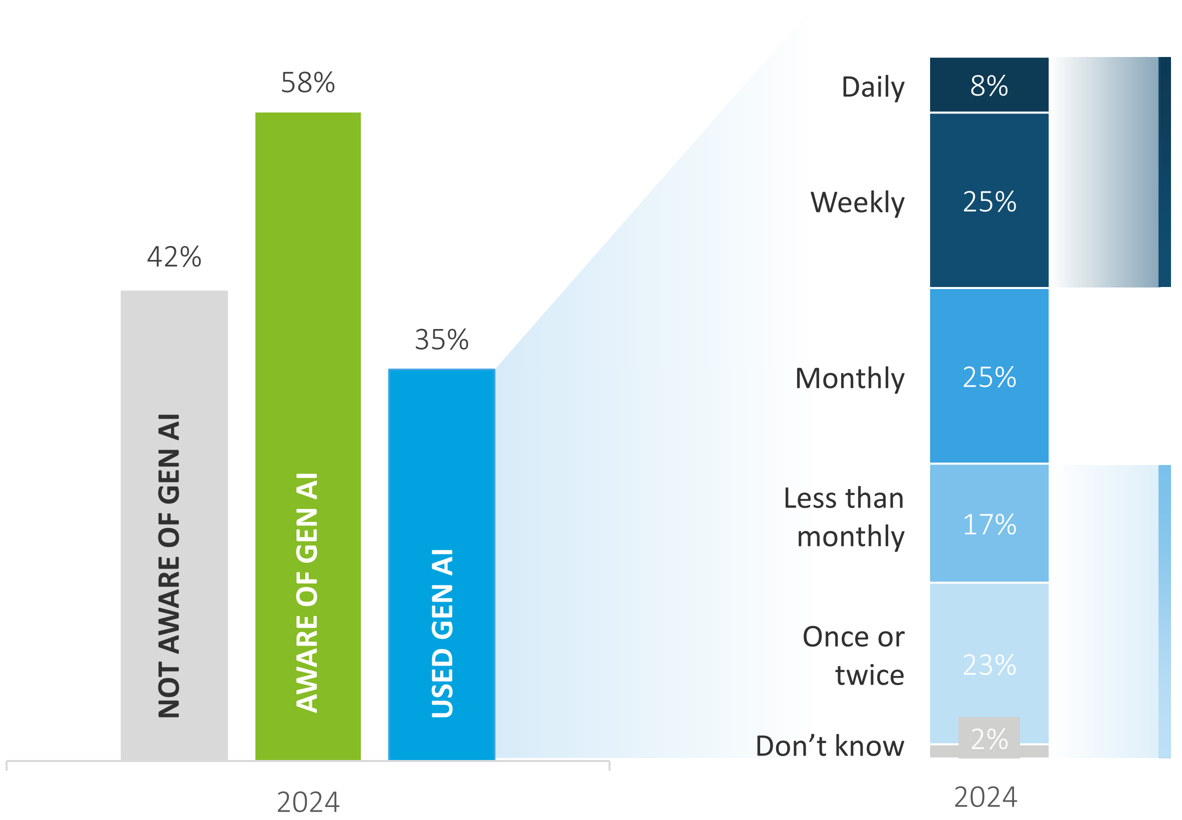
*Original questions: Which, if any, of the following generative AI tools are you aware of? / Which, if any, generative AI tools have you used?; Respondents were given a range of Gen AI tools to choose from, including "Another". Those who were aware of generative AI but did not know if they had used it were aggregated into "Aware of Gen AI, not used it"

Source: Deloitte Digital Consumer Trends, BE, June 2024

Most of those who have used generative AI are infrequent users, though usage is becoming more frequent as these tools integrate further into everyday tasks

Generative AI: Awareness
Which statement best describes your experience with generative AI tools (e.g., ChatGPT, Microsoft Copilot)*

Generative AI: Frequency of use
You mentioned you have used generative AI. Which of the following best describes your use?



The use of Gen AI tools has seen a notable increase compared to 2023. Weekly use has risen by 8 percentage points and daily usage is also on the rise, indicating a shift toward more regular engagement.

Despite the growing adoption, a significant proportion of users still use these solutions infrequently (40%), with usage less than monthly.

Weighted base: All respondents aged 18-75, 2023 (2,000), 2024 (2,000)
*Original questions: Which, if any, of the following generative AI tools are you aware of? / Which, if any, generative AI tools have you used? Respondents were given a range of Gen AI tools to choose from, including “Another”. Those who were aware of generative AI but did not know if they had used it were aggregated into “Aware of Gen AI, not used it”
Source: Deloitte Digital Consumer Trends, BE, June 2024

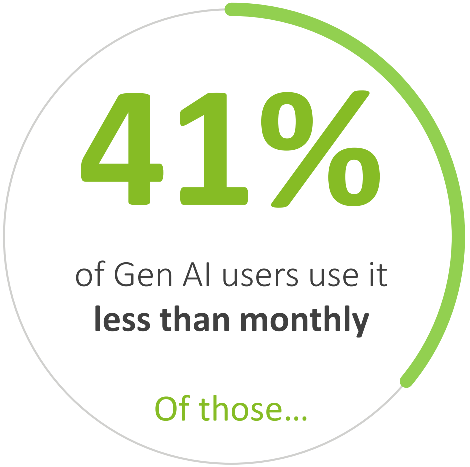
Generative AI tools are not yet top of mind for many users, with scepticism around their accuracy and concerns over data privacy limiting regular use

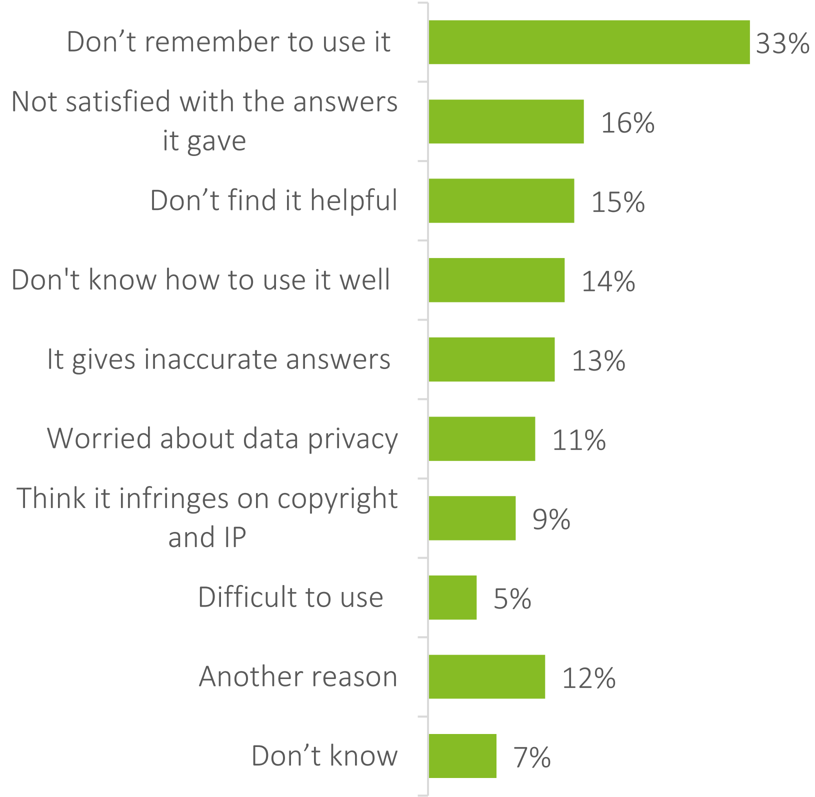
Generative AI: Low frequency users
Why don't you use Gen AI more frequently?

Generative AI tools are not yet top of mind for many in Belgium, with a third of respondents citing infrequent use due to simply forgetting about them. In contrast, these tools are more integrated into daily life in the UK, where only 15% of less frequent users attribute this to forgetfulness.

The initial excitement around Gen AI has cooled, as growing dissatisfaction with the accuracy of responses has led to increased scepticism.

Concerns about data privacy are a barrier to adoption, particularly among infrequent users. This issue is more pronounced in the UK, where nearly 20% of respondents express concerns about how these tools store and use their data, compared to 11% in Belgium. Greater transparency from AI providers could help address these concerns and improve adoption.

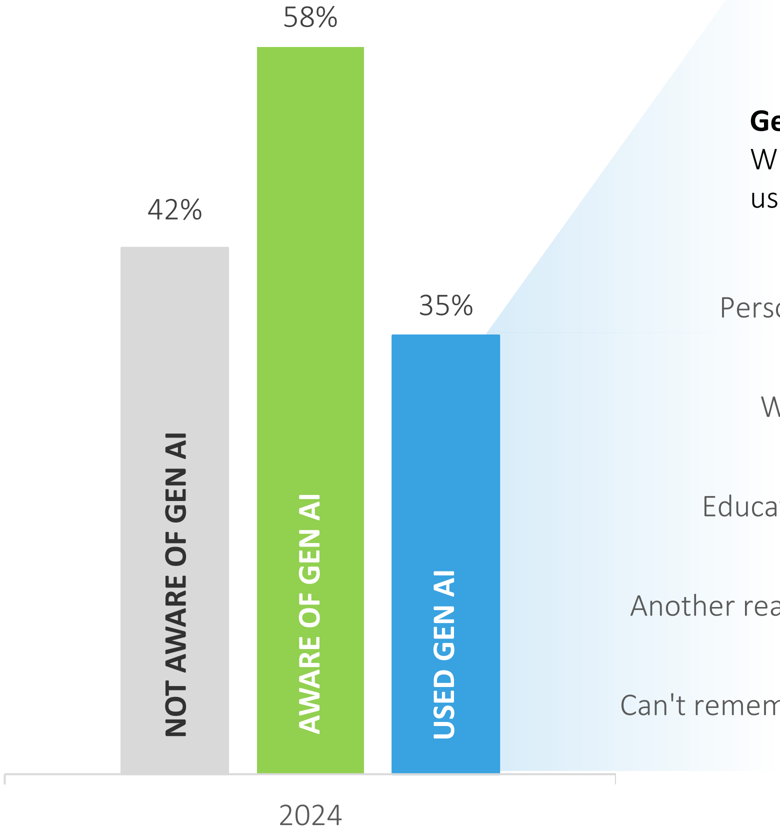




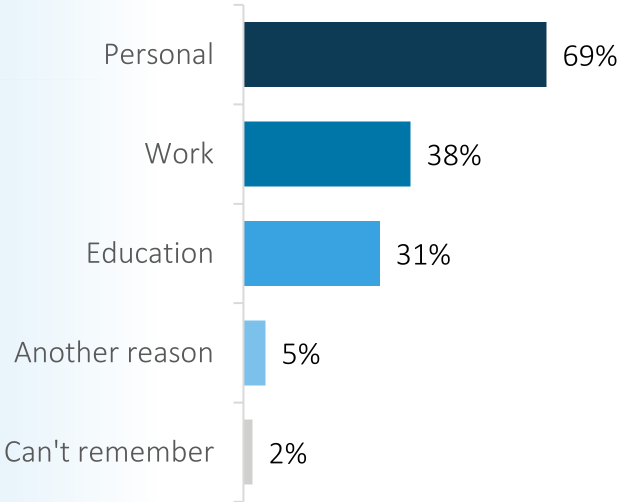
Weighted base: All respondents aged 18-75 who have used Gen AI less often than once a month or once or twice to try (287)
Source: Deloitte Digital Consumer Trends, BE, June 2024

The use of Gen AI at work is rapidly increasing, which underscores the significant impact of these technologies on professional environments

Generative AI: Awareness
Which statement best describes your experience with generative AI tools (e.g., ChatGPT, Microsoft Copilot)*



Generative AI: Purpose of use
Which of the following purposes have you used any generative AI for?



The most common reason for using generative AI tools is personal, with 69% of users citing this as their primary use case. This suggests that generative AI tools are predominantly used for individual projects, hobbies, and personal interest activities.

38% of users are utilizing generative AI tools for work purposes, an increase of 9 percentage points compared to 2023. This highlights the accelerating adoption of AI in the workplace; a trend that requires companies to swiftly implement AI policies to mitigate security and confidentiality risks.

Weighted base: All respondents aged 18-75, 2023 (2,000), 2024 (2,000)
*Original questions: Which, if any, of the following generative AI tools are you aware of? / Which, if any, generative AI tools have you used?; Respondents were given a range of Gen AI tools to choose from, including “Another”. Those who were aware of generative AI but did not know if they had used it were aggregated into “Aware of Gen AI, not used it”
Source: Deloitte Digital Consumer Trends, BE, June 2024

This growing adoption of Gen AI at work is reshaping the way employees communicate, create, and search for information

Generative AI: Using Gen AI for work

Which of the following work tasks have you used any generative AI tools for?

Generating ideas and looking up information are the top work-related uses of generative AI, with 41% of respondents utilising AI for both tasks.

36% use AI to write and edit emails, while 34% leverage it for translation, showcasing its role in improving communication and overcoming language barriers.

Summarising content is another key application, with 36% relying on AI to process large amounts of information quickly.

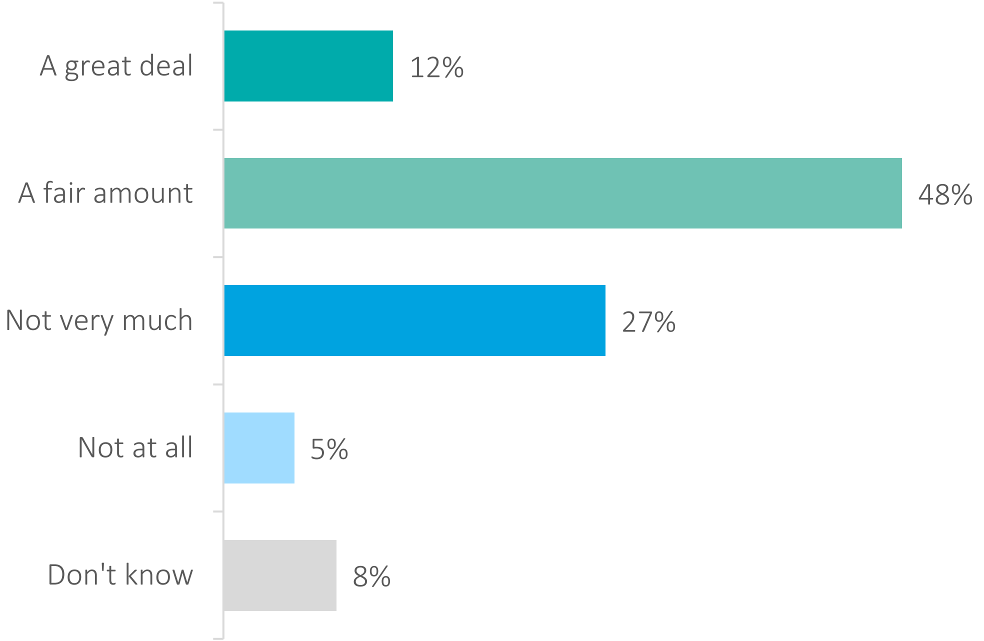
Emerging tasks such as data analysis, agenda planning, and generating presentations are expected to rise as more efficient tools such as Microsoft Copilot enter the workplace.

Weighted base: All respondents aged 18-75 who have used generative AI for work, 2024 (267)
Source: Deloitte Digital Consumer Trends, BE, June 2024

Most employees who have used generative AI at work report increased productivity, highlighting the significant value these tools can bring to the workplace

Generative AI: Productivity boost

To what extent, if at all, do you think Gen AI boosts your productivity at work?



According to 60% of employed users, generative AI is improving workplace productivity. However, this figure is lower than in neighboring countries like the UK, where it stands at 74%.

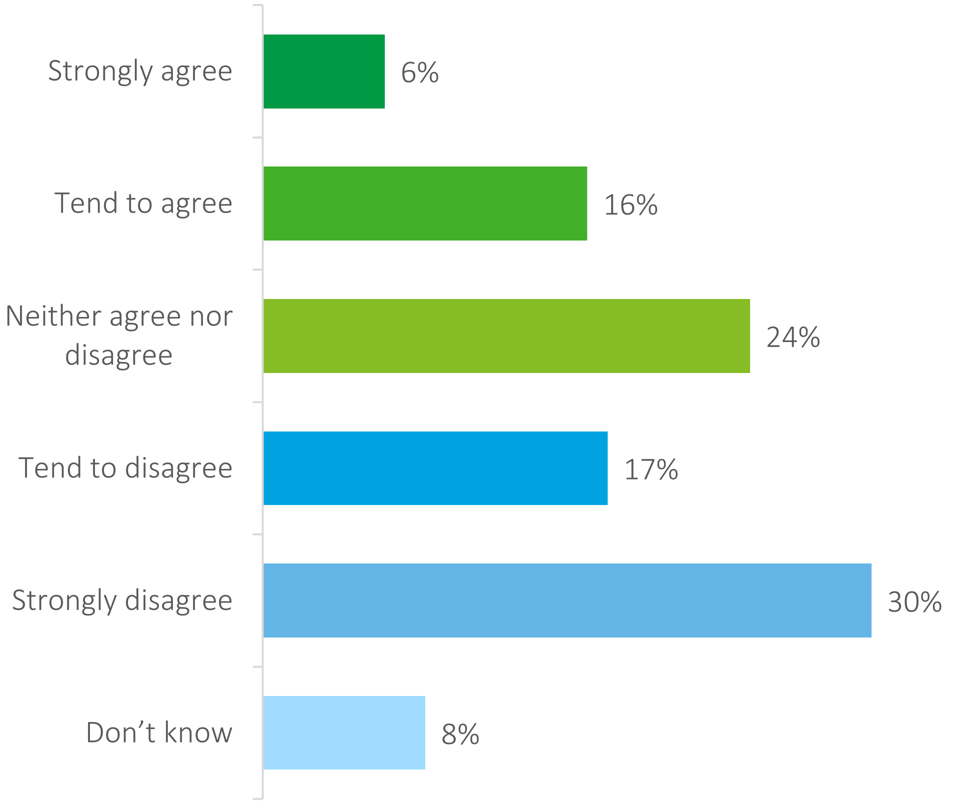
Conversely, 32% of employed users believe it does not significantly enhance productivity, highlighting a potential gap in understanding or maturity in the adoption of these tools.

As initial excitement fades, the AI industry and early adopters should focus on practical use cases and addressing challenges such as reliability, governance, and trust to maximise AI's impact in the workplace.

Weighted base: All respondents aged 18-75 who have used generative AI for work, 2024 (267)
Source: Deloitte Digital Consumer Trends, BE, June 2024

Despite this growing usage, many companies seem to lack maturity in promoting the use of generative AI, with just over one in five employees agreeing that their organisation actively encourages its adoption

Generative AI: Company encouragement
To what extent do you agree, or disagree, with this statement?
"My company actively encourages the use of Gen AI at work"



While many employees recognize the potential of generative AI to enhance productivity, only one in five companies actively promotes its use. This reluctance mirrors trends seen in the UK, reflecting a broader organisational caution toward AI adoption.

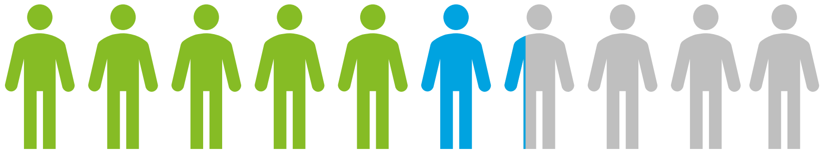
Regional disparities exist, with 37% of respondents in Brussels reporting company support for AI use, compared to 20% in Flanders and 18% in Wallonia.

Weighted base: All respondents aged 18-75 in employment who are aware of generative AI (687)
Source: Deloitte Digital Consumer Trends, BE, June 2024

Over-reliance on Gen AI assistants could erode consumer trust, with over half hesitant to engage

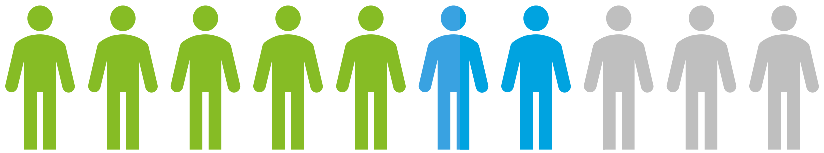
Many consumers are not yet comfortable interacting with Gen AI assistants or trusting AI-generated emails, with more than half expressing hesitation. This poses a challenge for companies increasingly relying on Gen AI as the first point of contact in customer service. Despite technological advancements, consumers continue to value personal, human interaction with brands. Over-reliance on AI assistants too quickly could undermine customer trust and weaken the personal connection that fosters loyalty, making it essential to balance AI integration with human engagement.

*“I would be **less inclined to trust an email** if I knew it was created using generative AI.”*



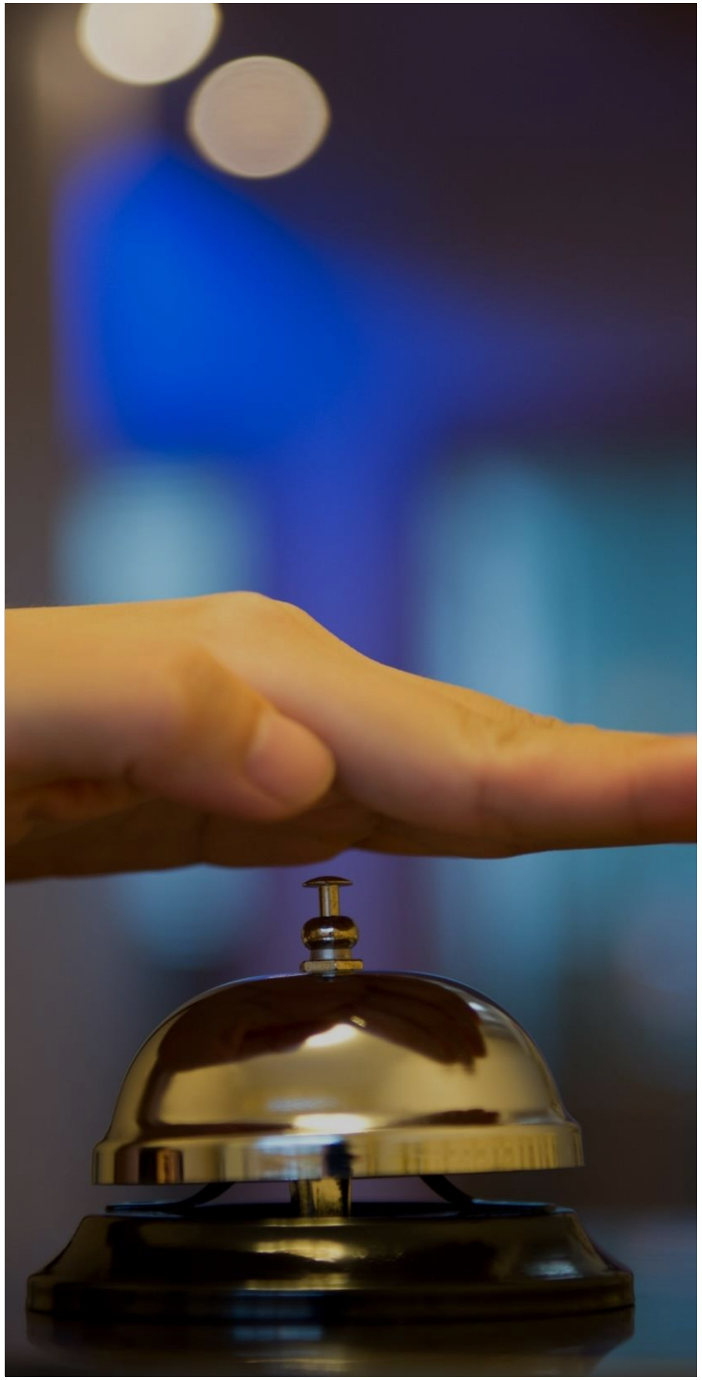
50% agree
18% disagree
32% neither agree or disagree or don’t know

*“I would be **less inclined to trust customer services** if I knew I was conversing with a generative AI assistant.”*



51% agree
20% disagree
29% neither agree or disagree or don’t know

Weighted base: All respondents aged 18-75, who are aware of generative AI, 2024 (1,166)
Source: Deloitte Digital Consumer Trends, BE, June 2024

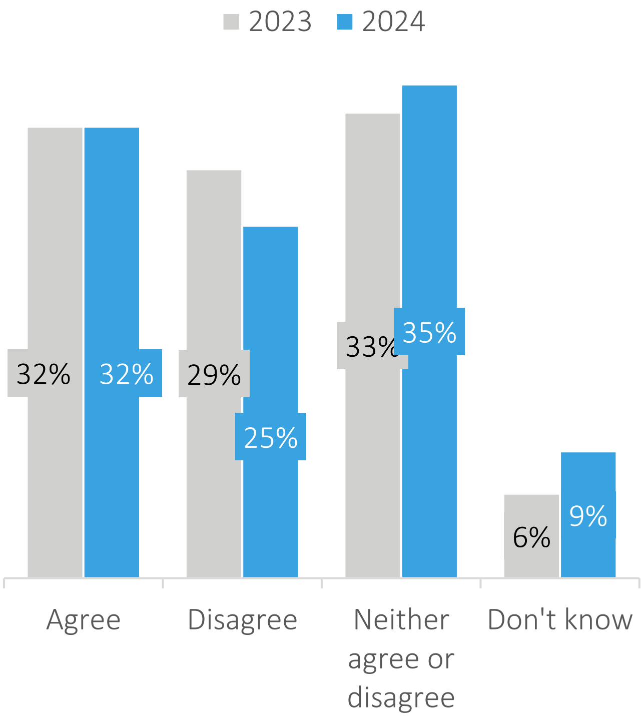


As awareness of hallucination bias decreases, prioritizing governance and training becomes essential to mitigating associated risks

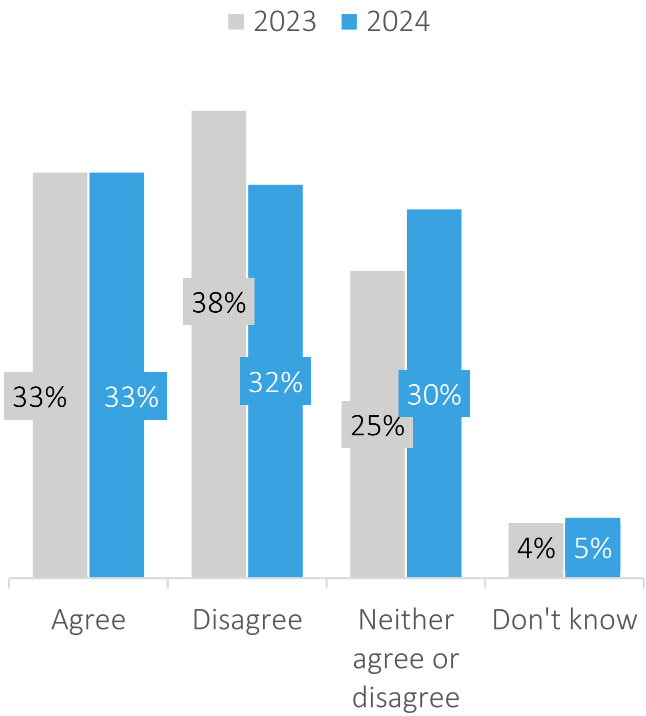
Generative AI: Hallucination

To what extent do you agree or disagree with the following statements?

"Generative AI responses are unbiased"



"Generative AI always produces factually accurate responses"



The hallucination bias, which refers to a Gen AI tool producing mistakes, occurs when the model generates information that sounds plausible but is inaccurate or unfounded.

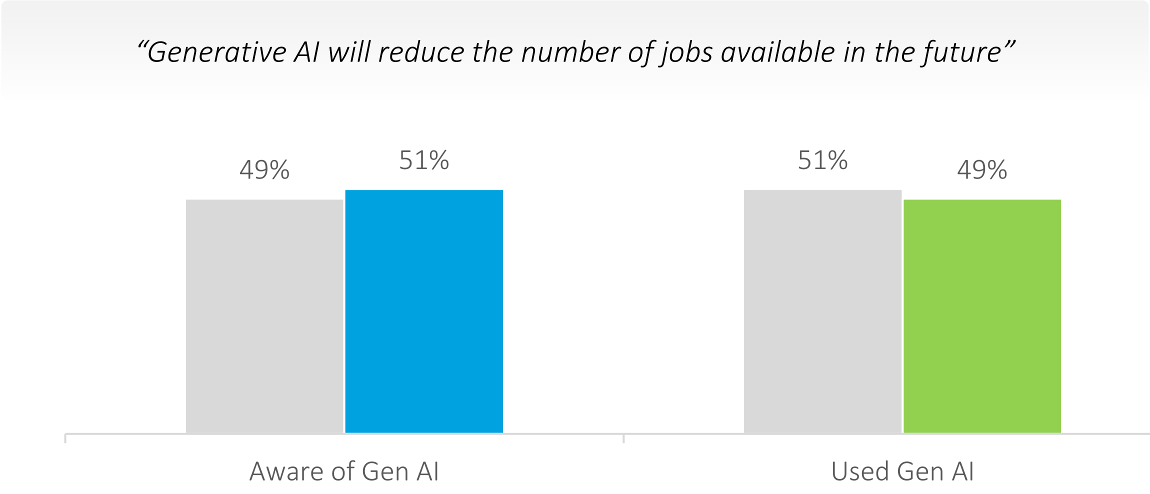
This year's results suggest a slight decline in Belgian consumers' awareness of this type of bias compared to last year. However, this may be attributed to a higher proportion of respondents who are uncertain, leading to an increase in the 'neither agree nor disagree' and 'don't know' responses.

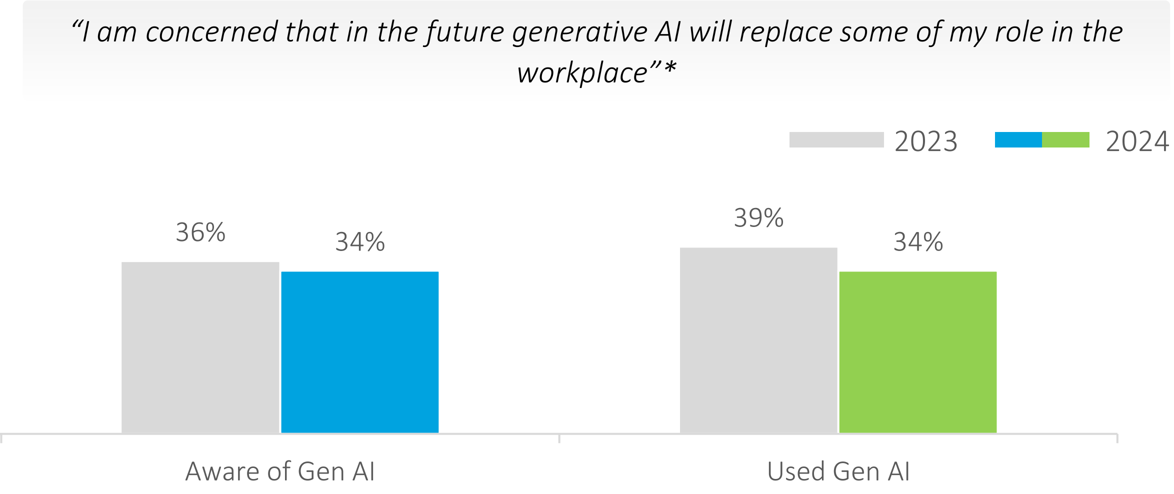
With 4.4 million people using generative AI at work, establishing a strong governance framework and providing comprehensive employee training are crucial for effectively managing associated risks

Weighted base: All respondents aged 18-75, 2023/2024 (2,000/2,000), who are aware of any Generative AI tool (903/1,166), who have used any Generative AI tool (460/707)
Source: Deloitte Digital Consumer Trends, BE, June 2024

While concerns about AI job replacement soften, half still believe it will impact future job availability

*Those who **agree** that…*





About half of those aware of generative AI believe it will reduce future job availability, with similar views among users.

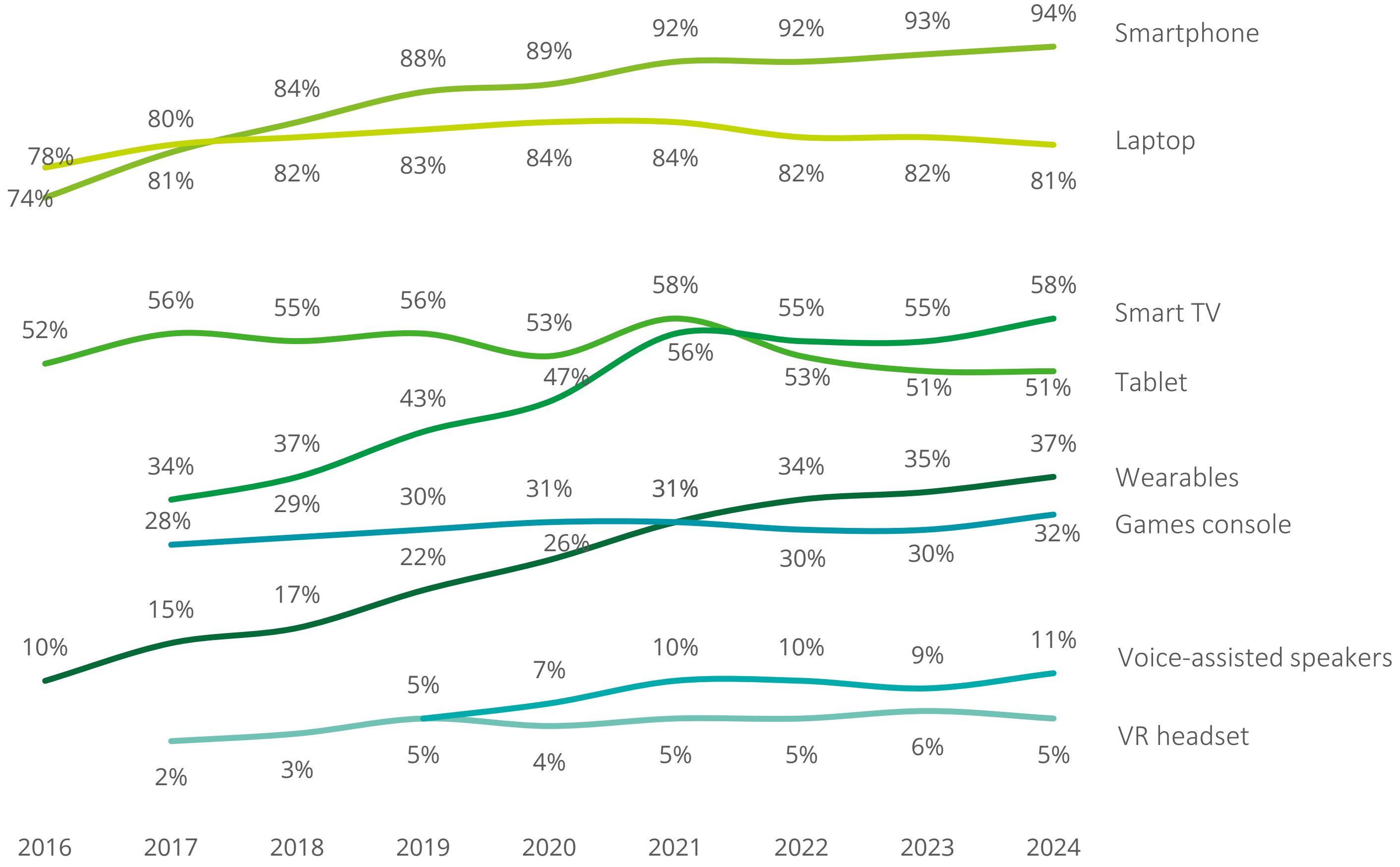
In the UK there is a stronger belief that AI will reduce the number of jobs in the future, with 63% of those aware of AI and 61% of users agreeing with this statement.

Concerns about AI replacing human roles in the workplace have decreased slightly among workers who use Gen AI tools, possibly reflecting a growing understanding of how AI can enhance, rather than replace, human creativity and critical thinking.

Weighted base: All respondents aged 18-75, 2023/2024 (2,000/2,000), who are aware of any Generative AI tool (903/1,166), who have used any Generative AI tool (460/707),
*Working adults who are aware of generative AI (578/751), Working adults who have used any Generative AI tool (290/453)
Source: Deloitte Digital Consumer Trends, BE, June 2024

DEVICES

Smart devices hit record adoption in 2024, while laptops and tablets lose their consumer appeal



Adoption of smartphones, smart TVs, wearables, consoles and voice-assisted speakers hit record highs in 2024, reflecting the growing integration of smart devices into daily life.

Smart TV penetration continues to rise, making it an increasingly essential device. As this trend grows, media players must prioritise having their apps available on Smart TVs to enhance the user experience and remain competitive in this evolving market.

Laptops appear to be on the downward trend after a few years of plateauing, indicating a lower degree of utility for consumers.

Finally, VR headset adoption has not picked up since 2019, highlighting the difficulties the technology faces to become mainstream in our national market.

Weighted base: All respondents aged 18-75, 2016 (2,000), 2017 (2,002), 2018 (2,002), aged 18-75 years, 2019 (2,000), 2020 (2,000), 2021 (2,000), 2022 (2,000), 2023 (2,000), 2024 (2,000)
Source: Deloitte Digital Consumer Trends, BE, 2016- 2024

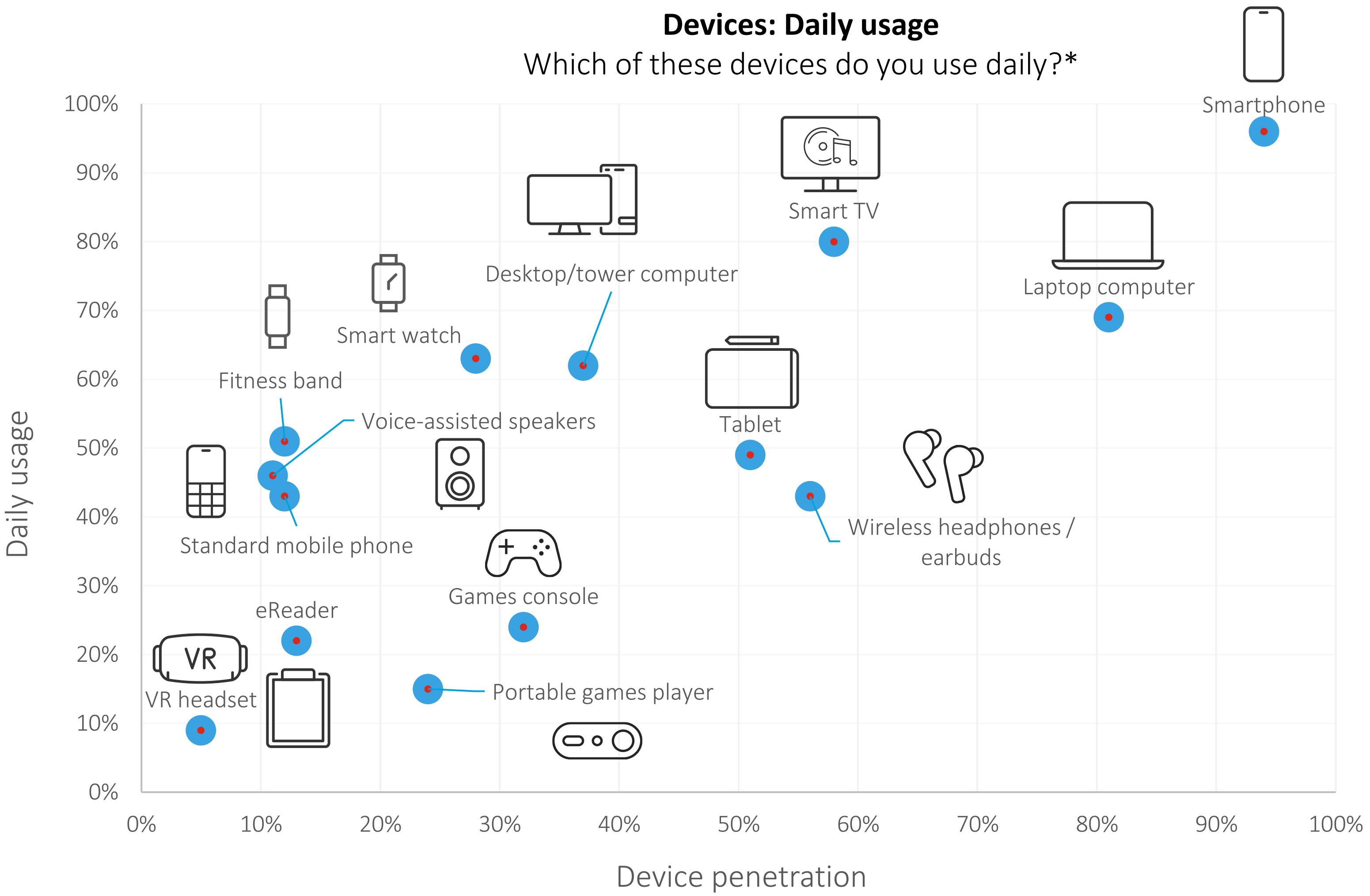
While smartphones remain the dominant device, smart TVs are increasingly becoming part of consumers' daily usage

Nearly all respondents use their smartphones daily, keeping them at the top of the list of most-used devices. Smart TVs rank second, with four out of five respondents using them daily, surpassing laptops, smartwatches, and tablets in frequency of use.

Meanwhile, VR headset adoption remains stagnant in terms of both penetration and daily usage compared to last year, as consumers continue to grapple with the perceived value of VR/AR technology, especially at current price points. The largest barrier to broader adoption, however, appears to be the inherent nature of the technology, requiring users to wear bulky headsets, which limits its appeal.

Devices: Daily usage

Which of these devices do you use daily?*



Weighted base: All respondents aged 18-75, 2024, with a smartphone (1,873), laptop (1,622), smart watch (563), smart TV (1,154), games console (644), VR headset (94)
*Original question: When was the last time you used any of these devices? Respondents were given a range of timeframes: last days, last week, last month, last three months, longer than three months ago
Source: Deloitte Digital Consumer Trends, BE, June 2024

More than four in ten adults do not plan to buy a new device in the next 12 months, with smartphones still largely in the lead for those with purchasing intent

Devices: Planned purchases

Which, if any, of the following devices do you intend to purchase in the next 12 months?

Consumers plan to purchase…

14% Smartphone

7% Tablet

9% Laptop

4% Desktop

8% Smart watch

4% Fitness band

8% Smart TV

7% Wireless headphones

3% Portable games player

5% Games console

2% VR headset

6% Speakers*

* = NET of Voice-assisted speaker 2% and Wireless speakers 4%

There are no brand-new device categories, and for many incumbent categories (such as smartphones) the replacement cycle has become predictable.

46%

of consumers **do not** plan to purchase a device in the next 12 months

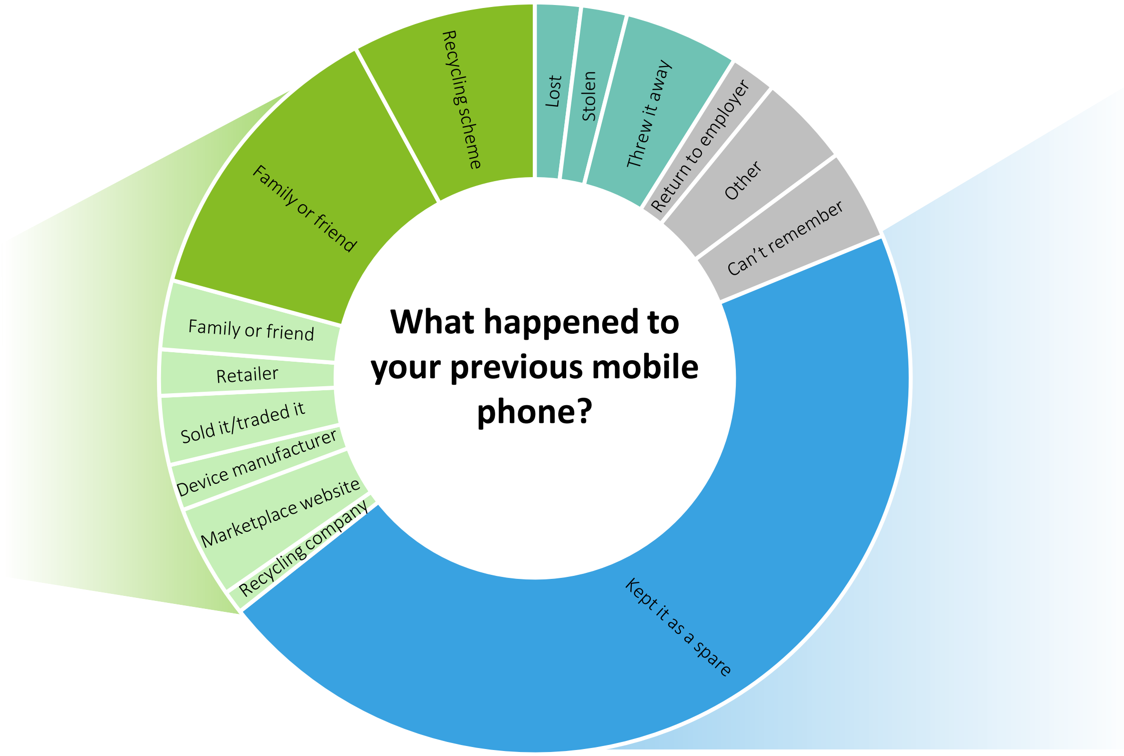
Weighted base: All respondents aged 18-75, 2024, (2,000)

Source: Deloitte Digital Consumer Trends, BE, June 2024

Nearly half of phone owners have retained their previous device as a spare

Devices: Previous smartphone
What happened to your previous mobile phone when you bought or received your current phone?

The most environmentally beneficial approach is to keep mobile phones in use for as long as possible. Achieving this requires extending the device's lifecycle through selling or trading.



Kept it as a spare	46%	Terminated	9%
Exchanged for money	13%	Other	6%
Exchanged for free	21%	Can't remember / didn't have	5%

However, 46% of Belgian phone owners kept their previous phones as spares, which is significantly higher than in the UK (38%).

Overall, this is only a slight decrease of 2 percentage points since 2022. The primary reason consumers keep their old phones is to have a backup in case their new one breaks (40%), while others do so to retain access to their data (12%).

Industry players can address this issue by offering solutions such as device insurance and cloud storage, encouraging consumers to return their old devices into circulation. This would further extend product lifespans and help reduce their environmental impact.

Weighted base: All respondents aged 18-75, who have a phone or smartphone, 2024 (1,939)
Source: Deloitte Digital Consumer Trends, BE, June 2024

13% of smartphone owners currently use a device previously owned by someone else

Devices: Second-hand ownership
Which, if any, of the following devices that you currently use were previously owned by someone else?

Consumers have second-hand…

13% Smartphone

6% Tablet

10% Laptop

5% Desktop

4% Portable games player

6% Games console

6% Smart TV

2% VR headset

4% Smart watch

2% eReader

31%

of consumers have at least one second-hand or refurbished device*
[* a device previously owned by someone else]

Smartphones are the predominant category among second-hand devices, reflecting their widespread availability and demand.

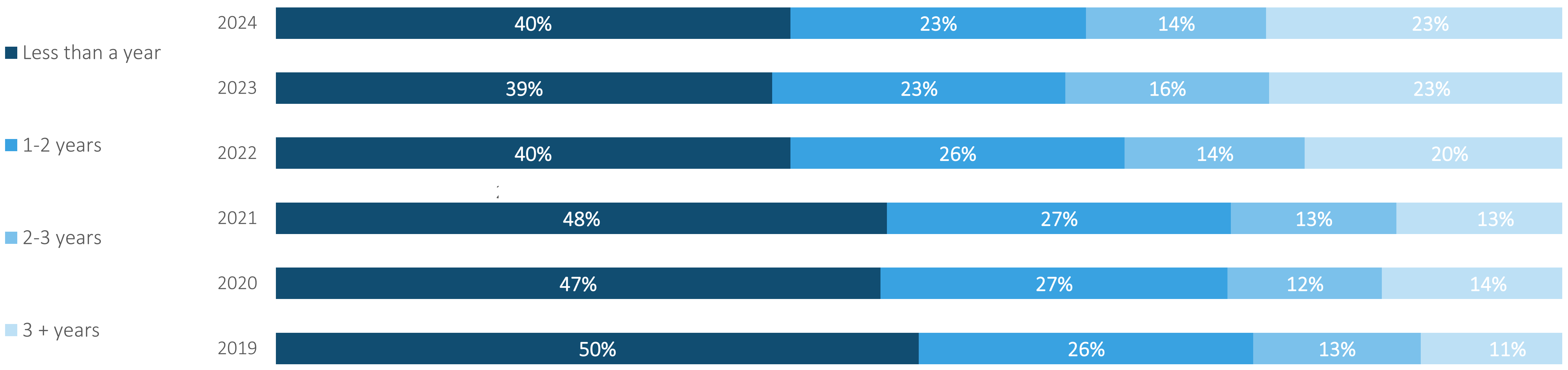
In Flanders, the ownership of second-hand connected devices is lower at 26%, compared to 44% in Brussels and 36% in Wallonia, indicating regional differences in the market.

These relatively low scores for second-hand ownership across all devices should trigger companies to develop second-hand offers, enhance device refurbishment programmes, or increase product longevity.

Weighted base: All respondents aged 18-75, who have used the devices they own or have access to, 2024 (1,990)
Source: Deloitte Digital Consumer Trends, BE, June 2024

In recent years, people have been replacing their smartphones less frequently

Devices: Age of smartphone
How long have you owned your current phone?



Belgian phone owners are keeping their phones longer than before. In 2024, one quarter of respondents reported owning their phones for more than three years. Additionally, 60% of smartphones in use in Belgium in 2024 were purchased more than a year ago, marking a 10-percentage point increase since 2019.

Weighted base: All respondents aged 18-75, who have a phone or smartphone, 2019 (1,751), 2020 (901), 2021 (924), 2022 (920), 2023 (922), 2024 (978)
Note: Respondents who "Don't Know" not shown
Source: Deloitte Digital Consumer Trends, BE - June 2024

Consumers remain sceptical of corporate environmental claims, with low trust in tech transparency and limited conversations about carbon footprints

62% agree that companies often **overstate their "green" image** rather than implementing environmentally sound practices

26% agree they **trust that tech companies are transparent** when declaring their carbon footprint

21% agree they have **regular conversations** with family and friends about the carbon emissions of different activities

24% disagree, they have no idea what **their carbon footprint** is

Weighted base: All respondents aged 18-75, 2024 (2,000)
Source: Deloitte Digital Consumer Trends, BE, June 2024

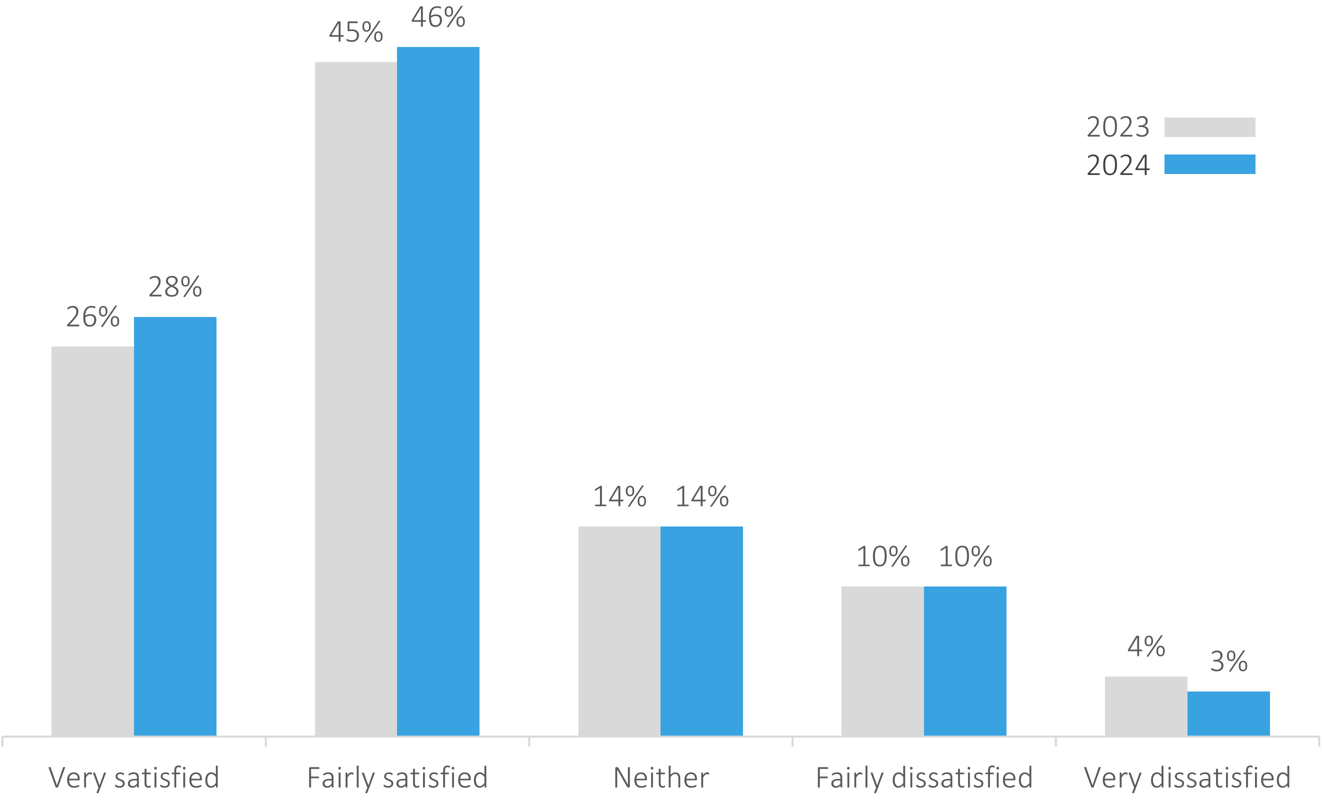
NETWORKS

More than seven in ten adults with home internet are satisfied with their connection

Networks: Satisfaction with internet connection
Overall, how satisfied or dissatisfied are you with your home internet connection?*

Broadband satisfaction levels in Belgium continue to rise, with 74% of respondents somewhat satisfied in 2024, up from 71% in 2023, regardless of the underlying technology. Yet, younger generations tend to be more demanding in terms of connectivity, showing higher levels of dissatisfaction compared to older adults on average.

Most broadband users find that their network sufficiently supports key applications such as video streaming, social media, online gaming, and work-related tasks including video calls and file transfers. This is largely because most mainstream online applications are optimised to function well with speeds of 5 Mbit/s or lower, meeting the needs of the majority of users (*2024 Global TMT Predictions*).

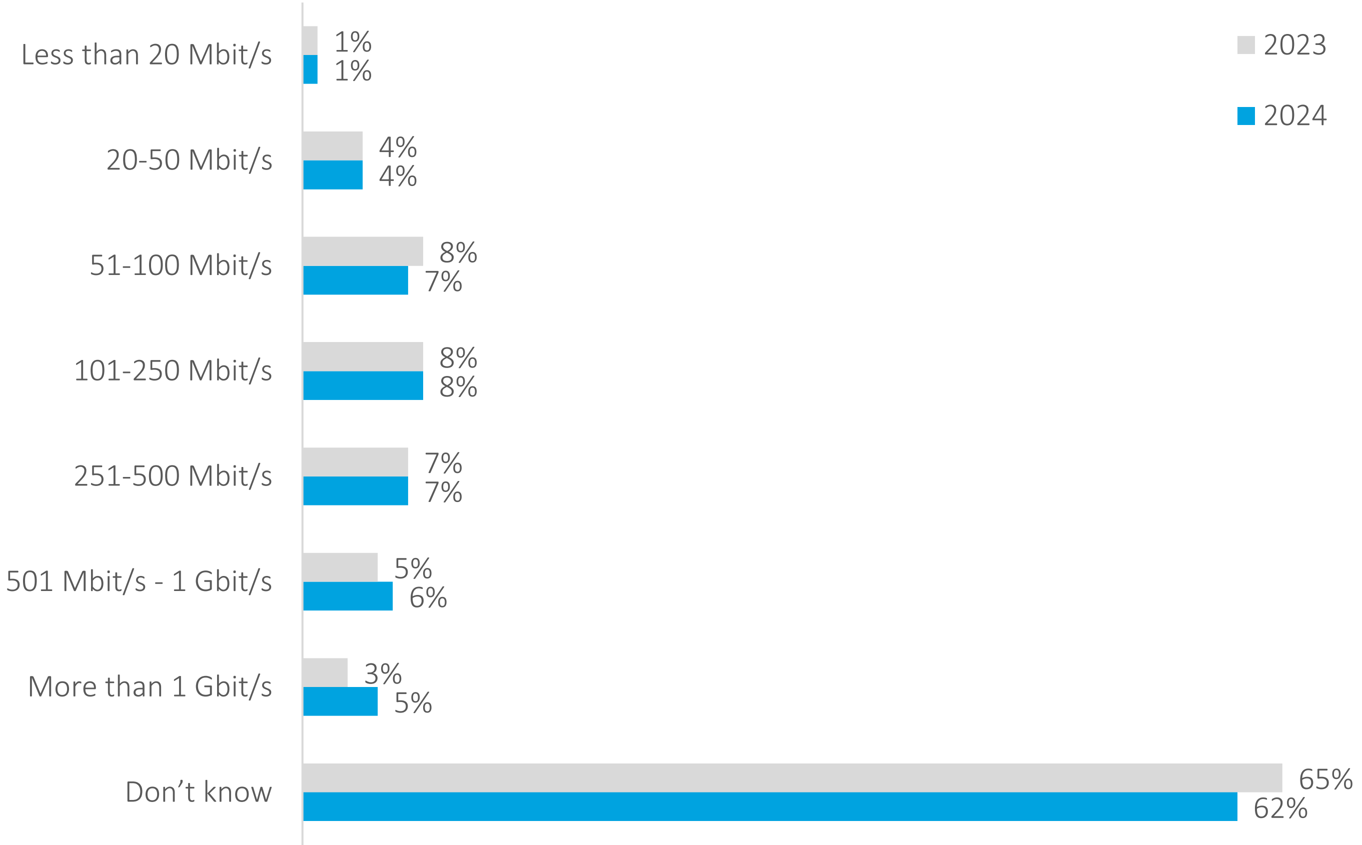


Weighted base: All respondents aged 18-75, who have internet access at home, 2023 (1,982), 2024 (1,549)
*Original question: On balance, how satisfied or dissatisfied are you with your home internet connection overall?
Source: Deloitte Digital Consumer Trends, BE, June 2024

Despite significant advancements in broadband technology, most users remain unaware of their home connection speeds

Networks: Broadband speeds

How fast is the home internet connection you currently have?



Weighted base: All respondents aged 18-75, who have internet access at home, 2023 (1,982), 2024 (1,549)
Source: Deloitte Digital Consumer Trends, BE, June 2024

Three in five Belgians (62%) do not know their home broadband speed, likely because speed is becoming less of a concern compared to factors such as reliability and in-home coverage. This figure is significantly higher than in the UK, where only 42% of respondents reported being unaware of their internet speed.

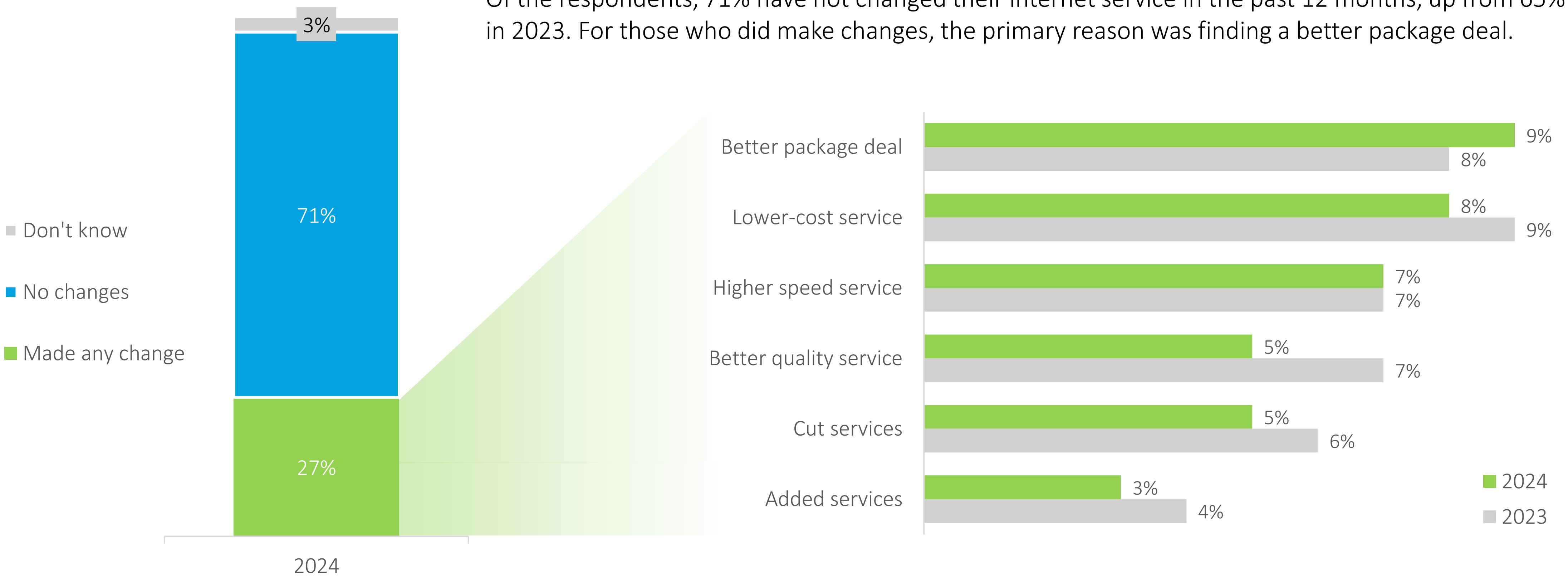
This trend also correlates with age and gender. Among 18–24-year-olds, 46% do not know their connection speed, compared to 73% of those aged 65–75. Also, women are less aware of their internet speeds, with 77% reporting they do not know their connection speed, compared to 47% of men.

Beyond speed, there are other factors that drive consumers to change their internet service

Networks: Drivers to change home internet

Which, if any, changes have you made to your home internet service in the past 12 months?

Of the respondents, 71% have not changed their internet service in the past 12 months, up from 65% in 2023. For those who did make changes, the primary reason was finding a better package deal.



Weighted base: All respondents aged 18-75, who have internet access at home, 2023 (1,982), 2024 (1,549)
Source: Deloitte Digital Consumer Trends, BE, June 2024

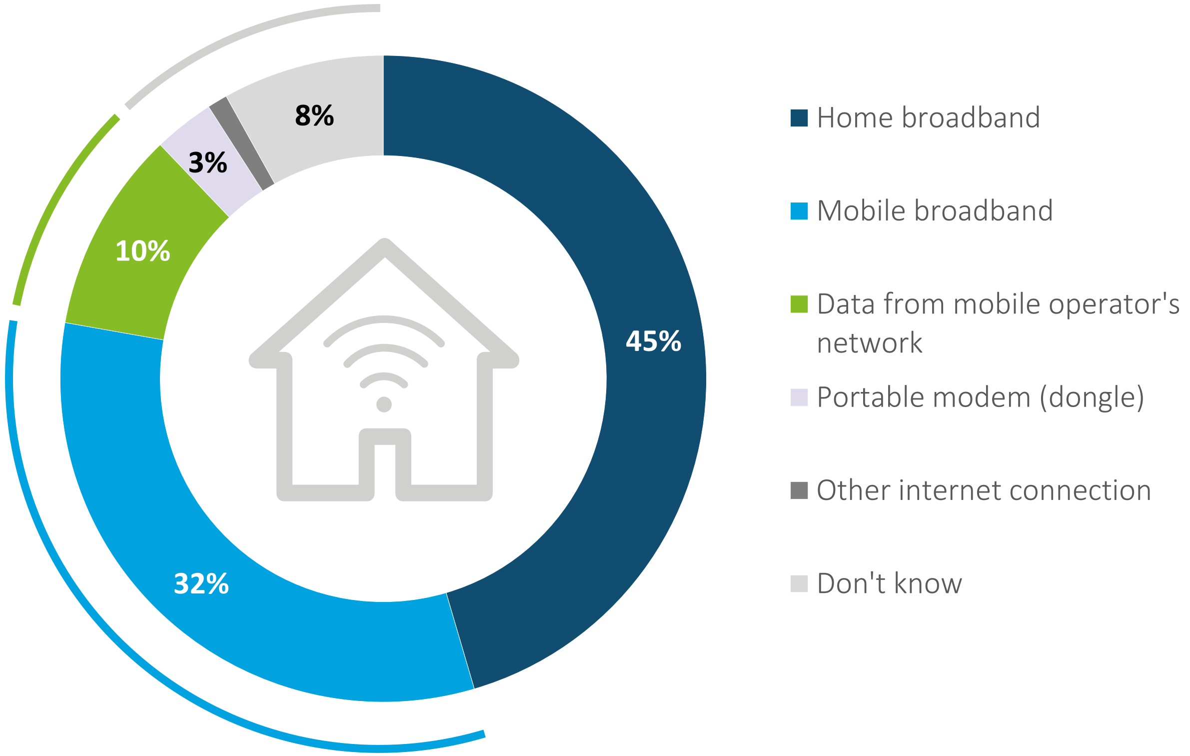
Home (fixed) broadband remains the primary internet connection for Belgian households, but mobile broadband is emerging as an attractive alternative for those seeking more flexibility

Networks: Primary connection

Which, if any, of the following types of internet or home broadband connection is the MAIN one in your household?

The relatively high percentage of Belgians using mobile broadband at home, compared to neighbouring countries, suggests a possible lack of awareness about the specific technology used for home internet connections. Coupled with the 8% who responded "I don't know”, this indicates that some may struggle to differentiate between fixed and mobile broadband options.

Mobile broadband penetration is higher among young people, who typically have lower incomes and are more likely to rent and move frequently. In these cases, fixed wireless access (FWA) solutions—including informal FWA options like smartphone tethering (through the mobile operator’s network)—can provide a compelling alternative to the often costly and inflexible fixed broadband services.



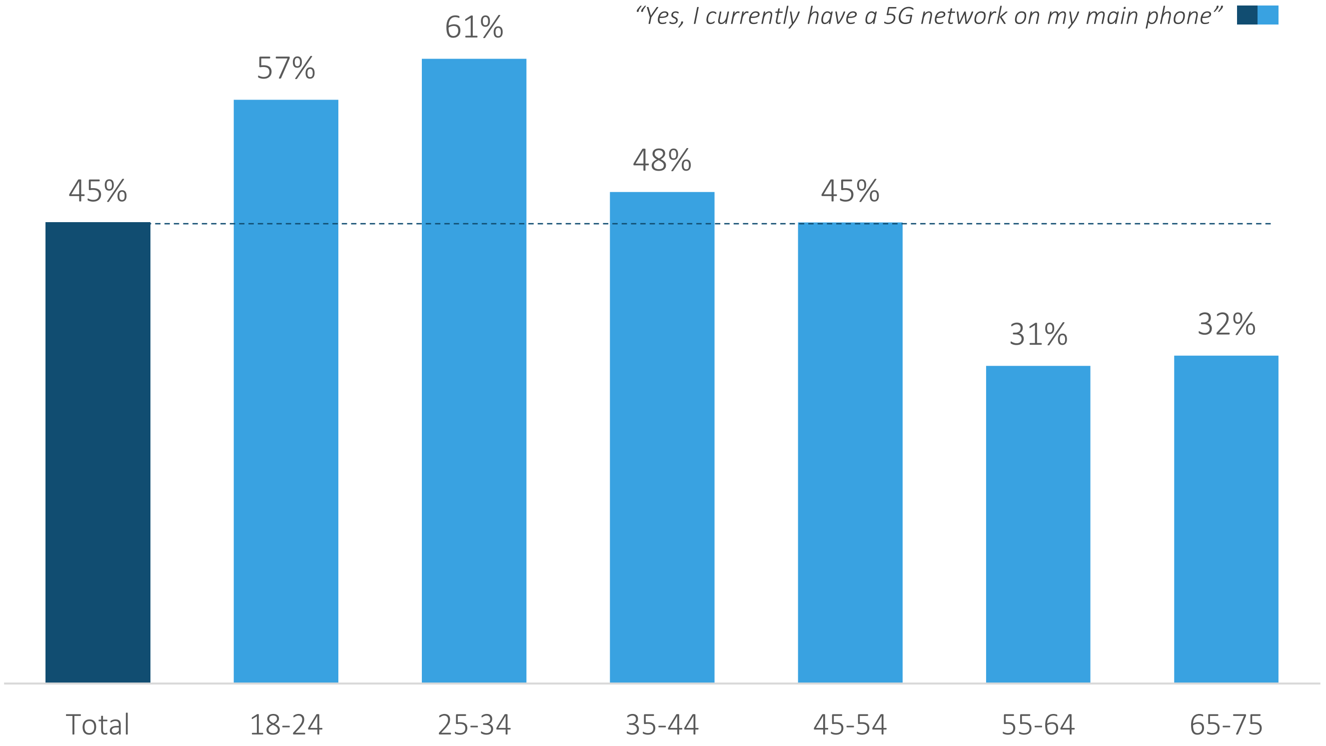
Weighted base: All respondents aged 18-75, 2024 (2,000). Age ranges: 18-24 (224), 25-34 (364), 35-44 (362), 45-54 (372), 55-64 (372), 65-75 (305)

Source: Deloitte Digital Consumer Trends, BE, June 2024

45% of phone owners currently have a 5G network on their mobile device, yet access varies widely across age groups, with younger users more likely to be connected compared to older generations

Networks: 5G access

Are you currently on a 5G network on your main phone?



The number of 5G users has increased significantly over the past years, rising from 14% in 2022 to 34% in 2023 and 45% in 2024.

This growth is largely driven by younger generations, with about 60% of those under 34 connected to 5G, compared to around 30% of those over 55. Younger users tend to adopt new technologies faster due to their higher reliance on mobile internet for activities such as streaming, gaming, and social media.

Despite this growth, the perception of 5G remains relatively unchanged compared to 2023. To the question "*Since using a 5G network on your mobile phone, has your overall experience of mobile internet been better than it was on 4G, worse than it was on 4G or has it made no difference?*", about two in five users report an improvement in their experience, while over a third feel it's about the same as 4G.

Weighted base: All respondents aged 18-75, who have a phone or smartphone, 2024 (1,939) - Age ranges: 18-24 (216), 25-34 (344), 35-44 (354), 45-54 (368), 55-64 (360), 65-75 (296)

Source: Deloitte Digital Consumer Trends, BE, June 2024

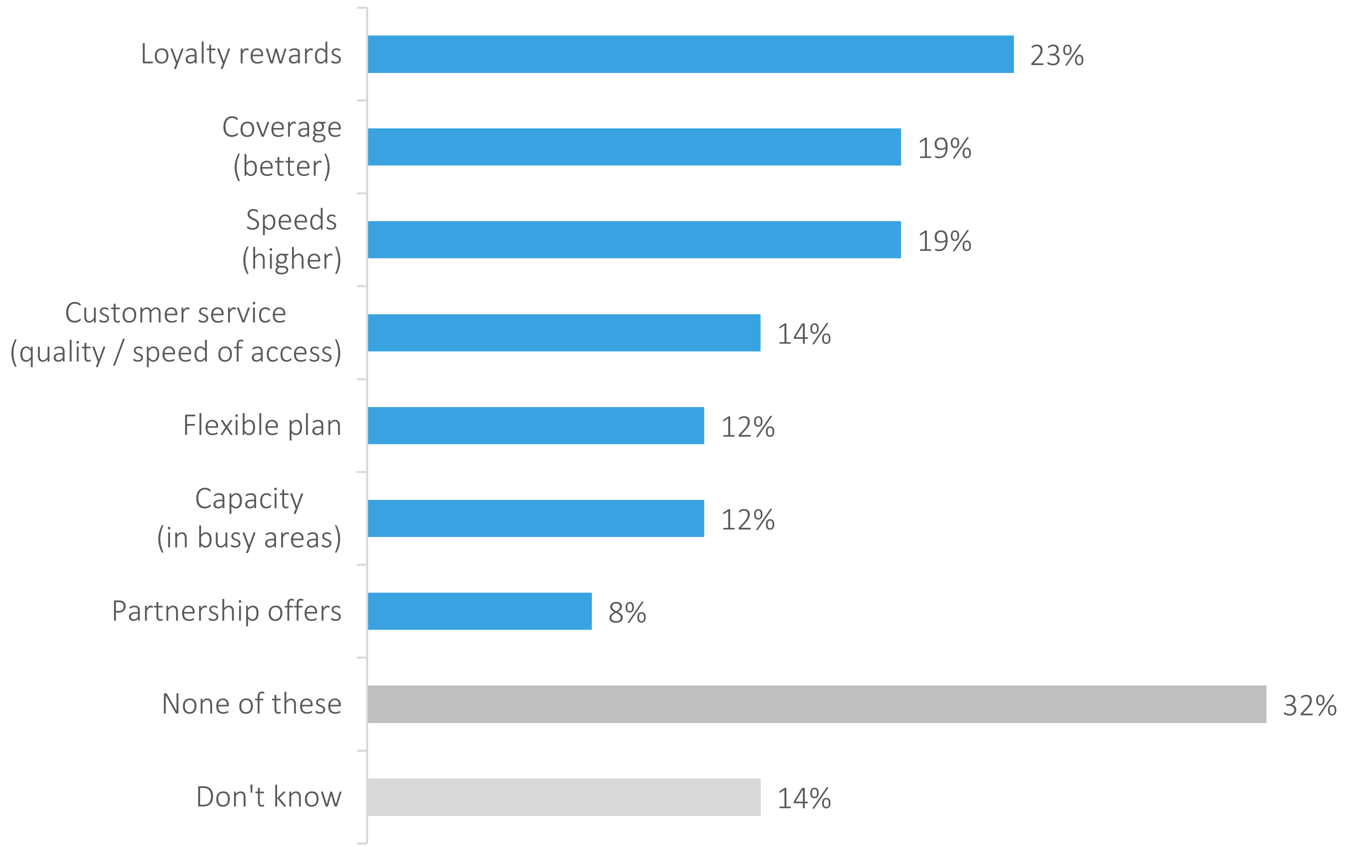
The main factors when considering alternative network providers are loyalty rewards, coverage, and higher speeds

Networks: Churn factors

Which, if any, of the following would encourage you to switch mobile network provider?

Loyalty rewards, along with better coverage and higher speeds, are the top factors that could encourage consumers to switch mobile network providers, with a notable portion of users not swayed by any specific factor.

Churn drivers are correlated with age, as younger users, particularly students, are more likely to switch mobile providers for loyalty rewards (29% of 18-34-year-olds), while older age groups (55-75) are less sensitive to such offers, with only 15% citing rewards as an incentive to switch.



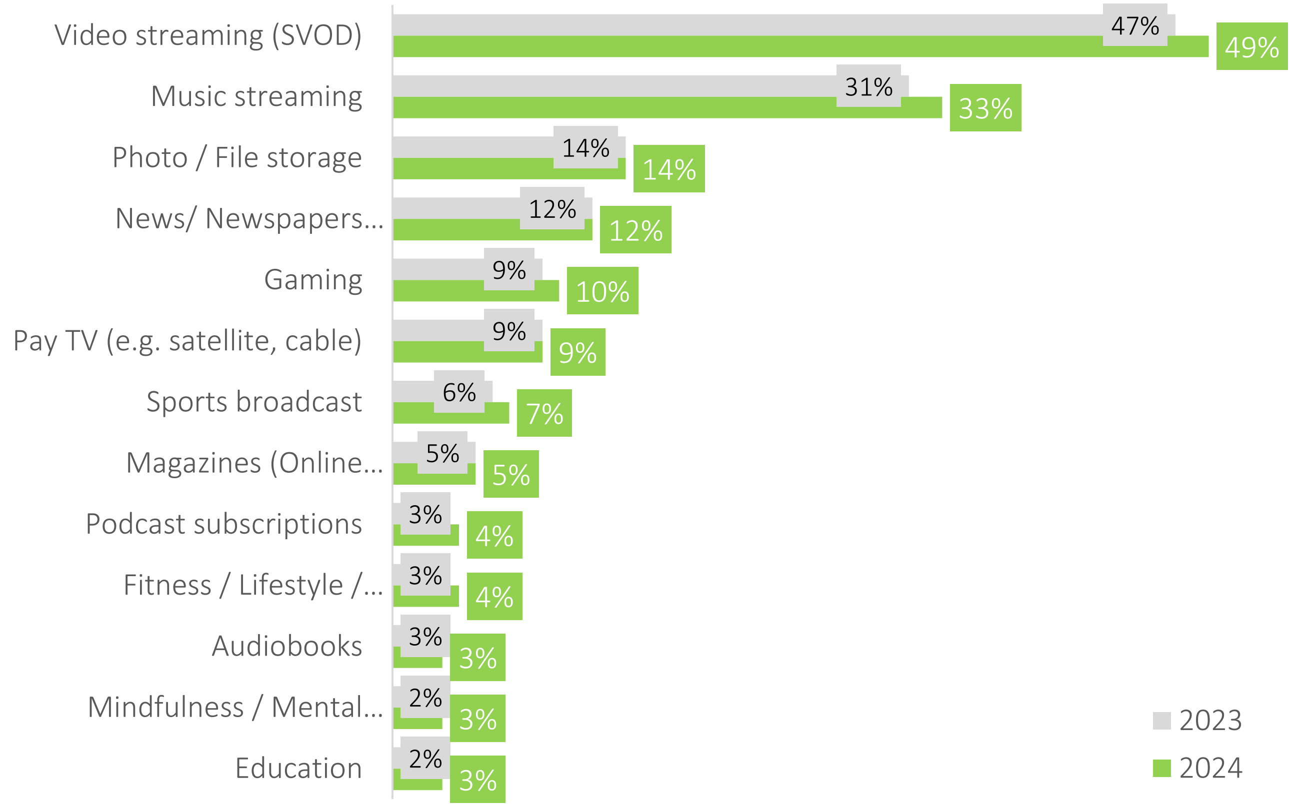
Weighted base: All respondents aged 18-75, who have a phone or smartphone (half sample - sample A), 2024 (978)
Source: Deloitte Digital Consumer Trends, BE, June 2024

CONSUMPTION

Video and music streaming are by far the most popular paid subscriptions, and the gap continues to widen as more consumers gravitate toward on-demand digital content

Consumption: Digital subscriptions

Which, if any, of the following paid digital subscription services do you have access to?*



Weighted base: All respondents aged 18-75, 2023 (2,000), 2024 (2,000)
*not shown are respondents who answered None of These, Don't Know
Source: Deloitte Digital Consumer Trends, BE, June 2024

Subscriptions to video and music streaming platforms resume their growth in 2024, with half of Belgians (49%) subscribing to a video streaming platform and a third (33%) to a music streaming platform. This slight upturn can likely be attributed to the crackdown on password sharing.

These platforms further widen the gap with other paid subscriptions, such as file storage and news, which have remained stable since 2023 at 14% and 12%, respectively.

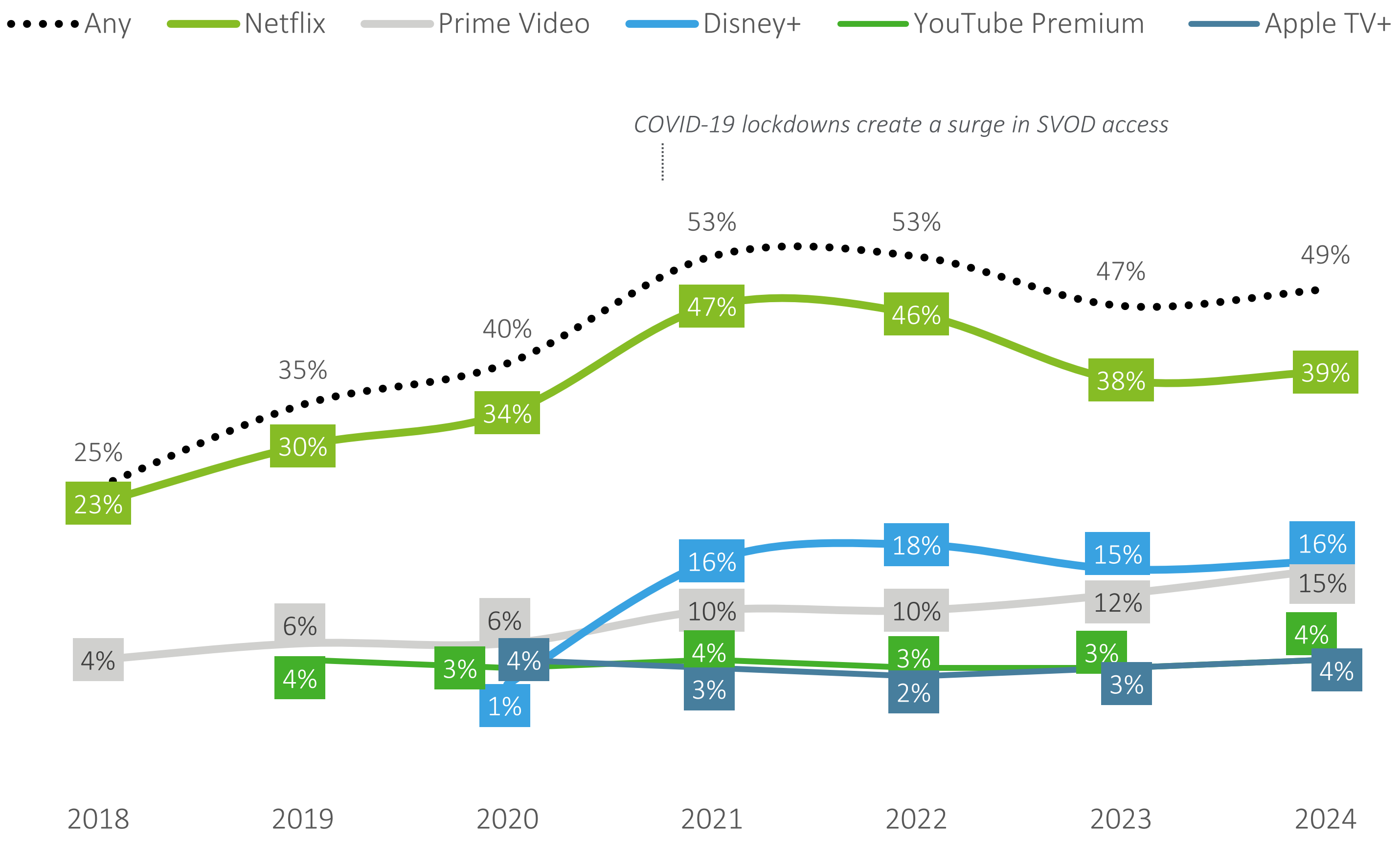
Despite the upward trend, video and music streaming penetration rates in Belgium remain significantly lower than in neighbouring countries like the United Kingdom where 75% of residents have a SVOD subscription, and 50% have a music streaming subscription.

As more consumers favour the flexibility and content variety offered by on-demand streaming services, traditional pay TV continues to face challenges in maintaining its audience.

Access to SVOD services is experiencing a slight recovery following last year's first-ever decline, driven by modest growth in the adoption of the most popular video streaming platforms

Consumption: Access to SVOD

Which, if any, of the following paid digital (video) subscription services do you have access to?*



Following a slight decline in 2023, access to video-on-demand (VOD) subscription services has shown a modest recovery, driven primarily by the largest streaming platforms.

In 2024, 49% of respondents reported having access to at least one subscription video-on-demand service, underscoring the significant market penetration of digital video subscriptions among Belgian consumers.

Netflix remains the leading SVOD service in Belgium, with 39% of respondents having access to its platform. However, it is facing growing competition from both local and international players that are differentiating themselves through unique offerings and pricing strategies, including ad-supported models *(e.g., HBO Max entered the Belgian market on 1 July 2024 with an ad-supported subscription offering).*

Weighted base: All respondents aged 18-75, 2018 (2,002), 2019 (2,000), 2020 (999), 2021 (2,000), 2022 (2,000) 2023 (2,000), 2024 (2,000)

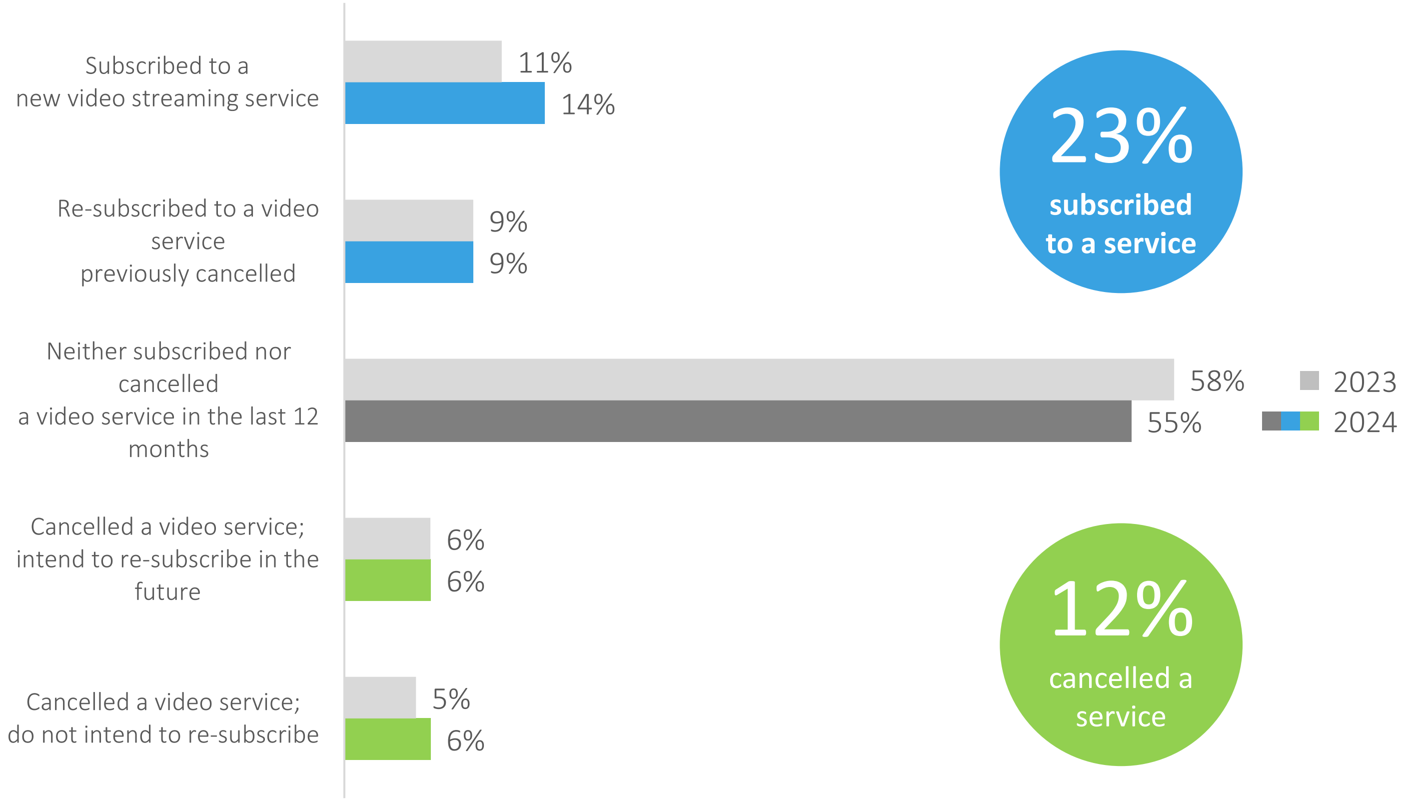
*Original question: Which, if any, of the following paid digital subscription services do you have access to? Respondents were given choices, including Netflix, Prime Video, Disney +, YouTube Premium and Apple TV+, and others.

Source: Deloitte Digital Consumer Trends, BE, June 2024

While 23% of Belgians have subscribed to a new video service, 12% have cancelled one, reflecting both a desire to explore new content and the steady churn in the streaming market

Consumption: SVOD subscription and churn

In the last 12 months, have you or someone else in your household subscribed to any paid subscriptions for a video streaming service (e.g., Netflix, Disney+), or cancelled an existing ones?



Weighted base: All respondents aged 18-75, 2023 (2,000), 2024 (2,000)
*Not shown are respondents who answered Can't Remember (14%)
Source: Deloitte Digital Consumer Trends, BE, June 2024

In Belgium, subscription growth is outpacing cancellations, a trend that contrasts with the challenges faced by SVOD services in markets with higher adoption rates, such as the US and the UK where churn rates reach 40% and 21%, respectively.

Although slightly declining, more than half of respondents (55%) did not subscribe to or cancel any video services in the past 12 months, indicating a relatively stable user base in Belgium.

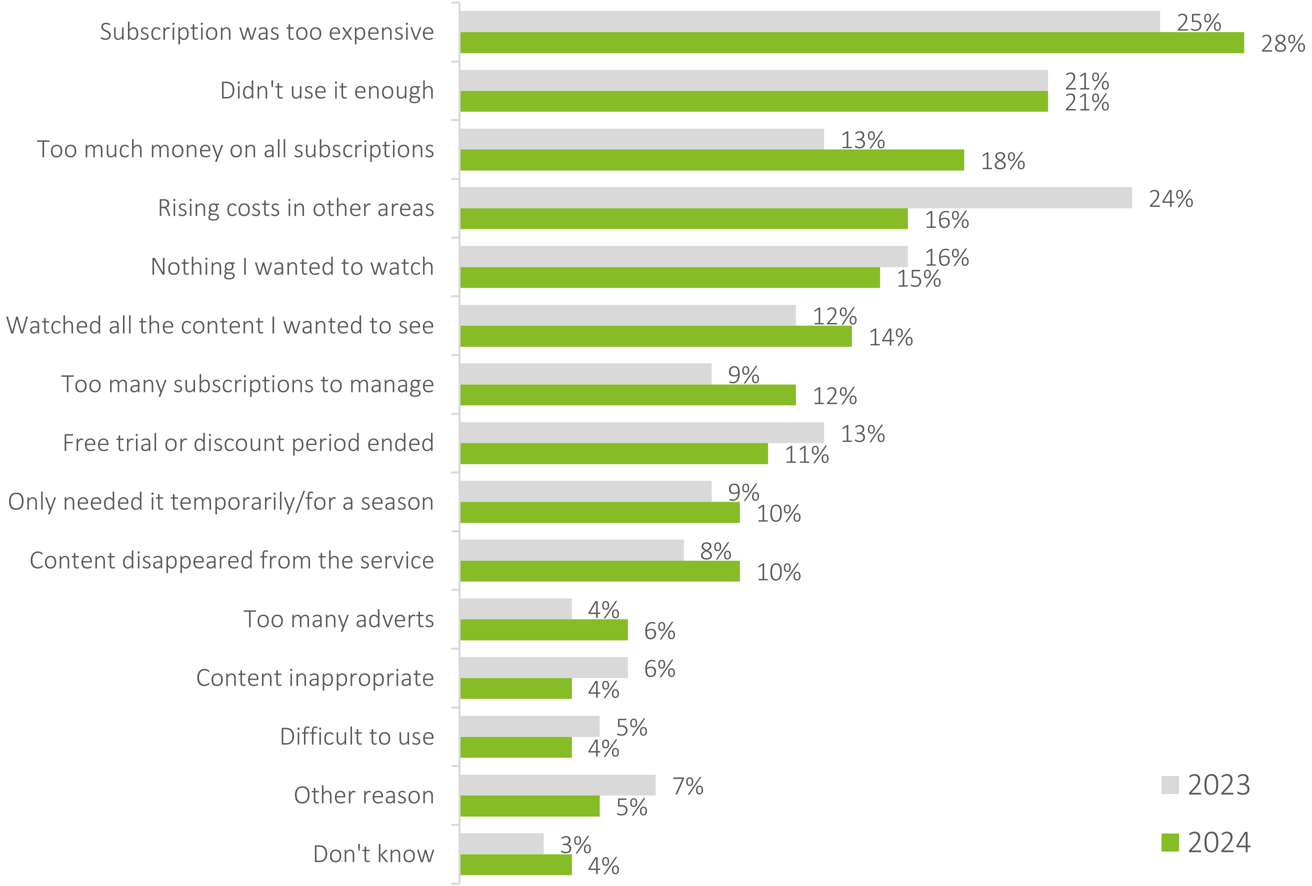
This stability is age-dependent, with younger generations showing significantly higher subscription activity due to their dynamic engagement with digital platforms and ease in managing multiple services.

For example, only 28% of respondents aged 18-24 reported no subscription changes, compared to 79% of those aged 65-75.

Purchasing power constraints and a lack of perceived value remain the most frequently cited reasons for churn among Belgians

Consumption: Reasons for cancelling SVOD

Why have you cancelled a paid subscription for a video streaming service in the last 12 months?



In 2024, 83% of those who have cancelled a paid subscription did it for reasons related to costs or lack of perceived value.

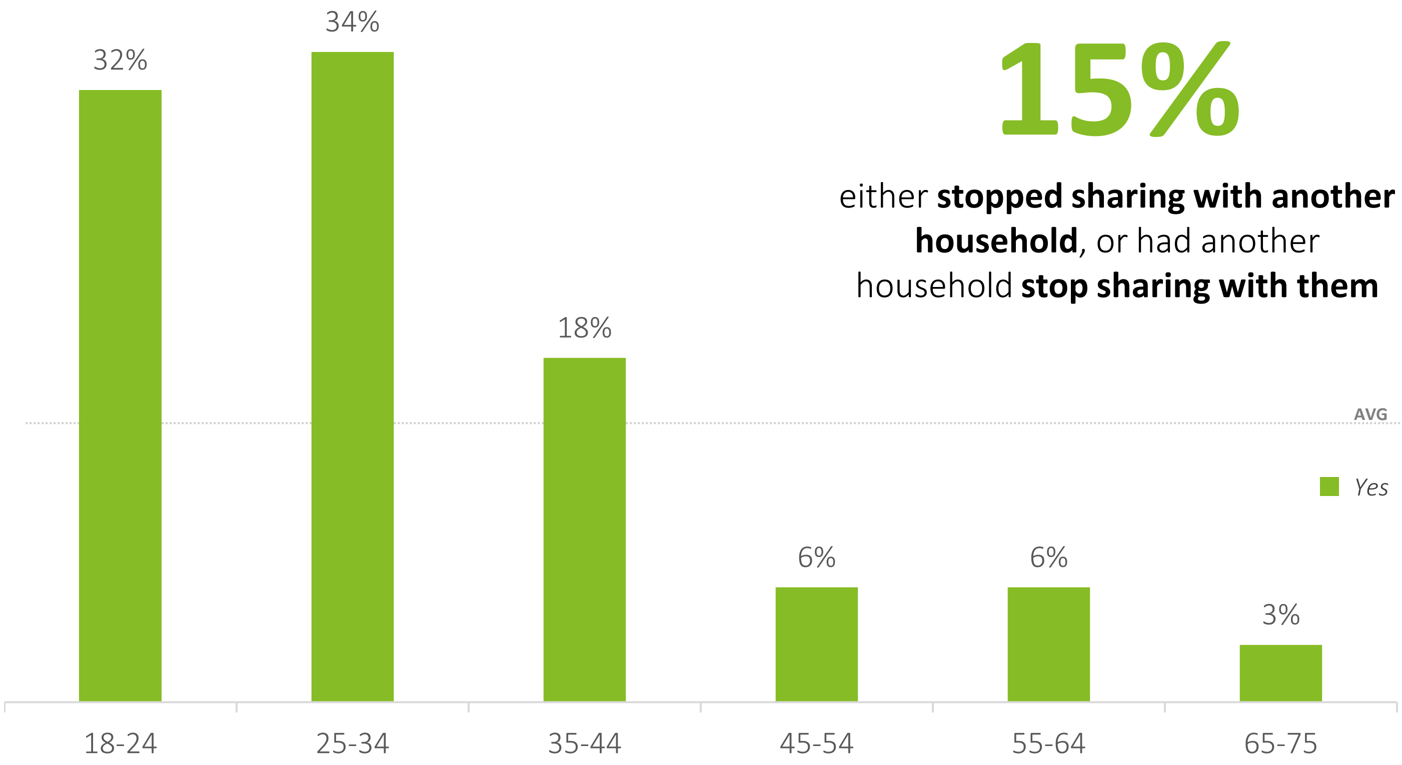
Recent price increases and crackdowns on password sharing may be amplifying this trend as consumers are increasingly forced to bear the full cost of services independently, rather than sharing them within a group.

Weighted base: All respondents aged 18-75, who cancelled a paid video service in last 12 months, 2022 (287), 2023 (364), 2024 (398)

Source: Deloitte Digital Consumer Trends, BE, 2022 - June 2024

Young adults claim to be more impacted by the sharing crackdown when compared to older age groups

Consumption: SVOD sharing crackdown
In the last 12 months, have you stopped sharing access to a video streaming service with another household because the provider ended free sharing?



15%

either **stopped sharing with another household**, or had another household **stop sharing with them**

Streaming platforms have started to implement measures to restrict account sharing by limiting streaming to a single household.

Of the respondents, 15% reported stopping SVOD account sharing due to these crackdowns, compared to 22% in the UK.

This impact is higher among younger users, with about a third of respondents aged 18-34 halting account sharing, while only 3-6% of older age groups have done so.

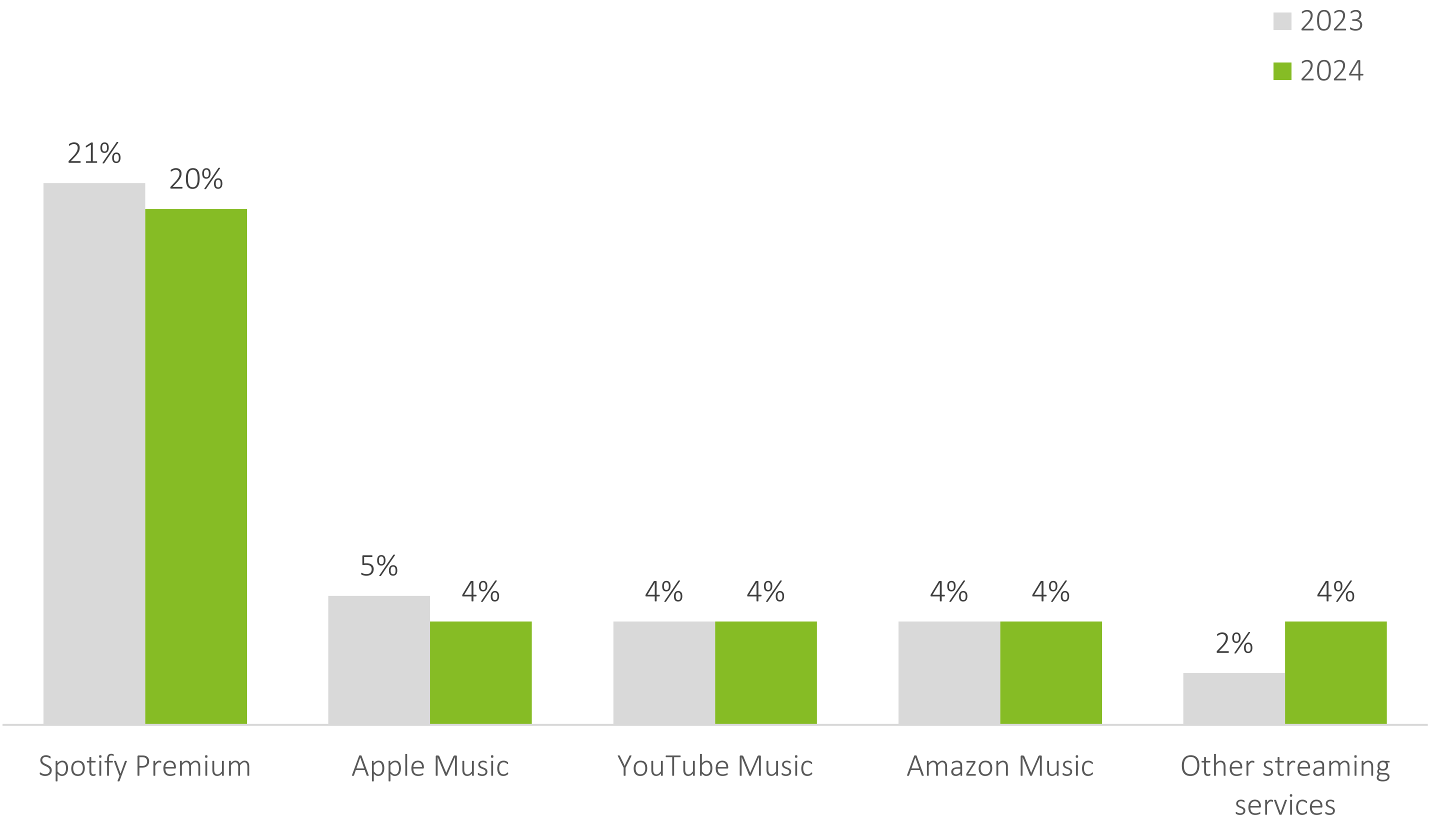
However, this has not led to a noticeable increase in overall churn, as many households have started paying for their own subscriptions. This seems to indicate that the early platforms to implement crackdowns have been successful.

Weighted base: All respondents aged 18-75, 2024 (2,000) - Age ranges: 18-24 (224), 25-34 (364), 35-44 (362), 45-54 (372), 55-64 (372), 65-75 (305)
Source: Deloitte Digital Consumer Trends, BE, June 2024

Access to music streaming services is increasing, with Spotify maintaining its dominance as the leading platform

Consumption: Access to music streaming

Which, if any, of the following paid digital (music) subscription services do you have access to?*



Access to paid music streaming services is growing (from 31% in 2023 to 33% in 2024), despite rising subscription costs, highlighting strong consumer demand in Belgium.

Subscribers demonstrate high loyalty due to the difficulty of migrating music libraries and playlists, discouraging service switching or cancellations. This "stickiness" helps maintain subscriber bases, even under pressure from increasing prices.

Spotify Premium remains the leading music streaming service in Belgium, accounting for more than half of all paid music streaming subscriptions in 2024.

Weighted base: All respondents aged 18-75, 2018 (2,002), 2019 (2,000), 2020 (999), 2021 (2,000), 2022 (2,000) 2023 (2,000), 2024 (2,000)

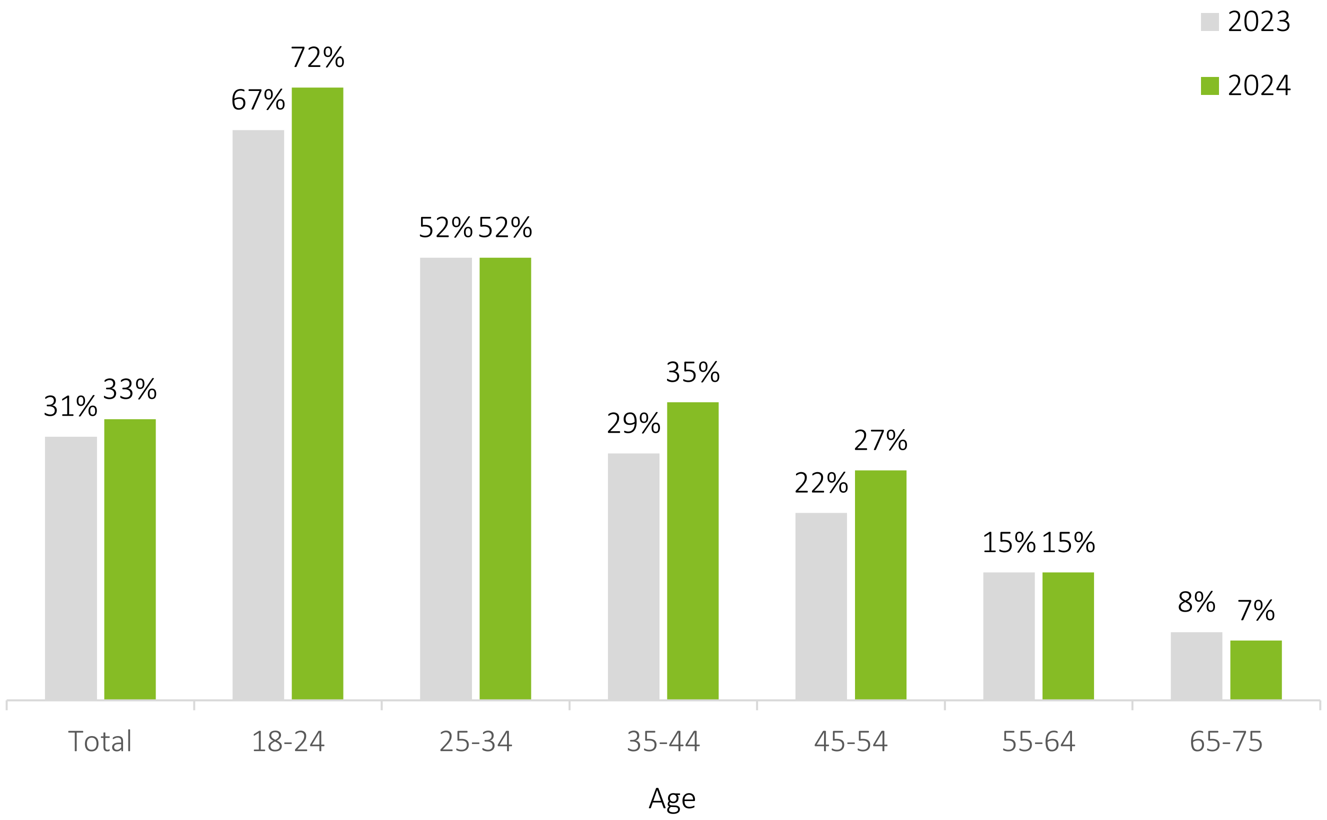
*Original question: Which, if any, of the following paid digital subscription services do you have access to? Respondents were given choices, including Apple Music, Spotify Premium, YouTube Music, Amazon Music Unlimited, Amazon/Prime Music, and others.

Source: Deloitte Digital Consumer Trends, BE, June 2024

The increase in access to paid music subscriptions is primarily driven by strong interest and higher adoption rates among younger generations, who are leading the growth in digital music consumption

Consumption: Age impact on music streaming

Which, if any, of the following paid digital (music) subscription services do you have access to?*



Younger age groups, particularly those aged 18-24 and 25-34, have the highest levels of access to paid music streaming services, with stable or growing penetration rates.

In contrast, older age groups exhibit significantly lower access, with minimal changes year over year.

This highlights a generational divide where younger consumers are more likely to adopt and maintain paid music streaming subscriptions, while uptake remains limited among older demographics.

Weighted base: All respondents aged 18-75, 2023 (2,000), Age ranges 2023 : 18-24 (225), 25-34 (362), 35-44 (362), 45-54 (374), 55-64 (371), 65-75 (307); 2024 (2,000) - Age ranges 2024 : 18-24 (224), 25-34 (364), 35-44 (362), 45-54 (372), 55-64 (372), 65-75 (305)

*Original question: Which, if any, of the following paid digital subscription services do you have access to? Respondents were given choices, including Apple Music, Spotify Premium, YouTube Music, Amazon Music Unlimited, Amazon/Prime Music, and others.

Source: Deloitte Digital Consumer Trends, BE, June 2024

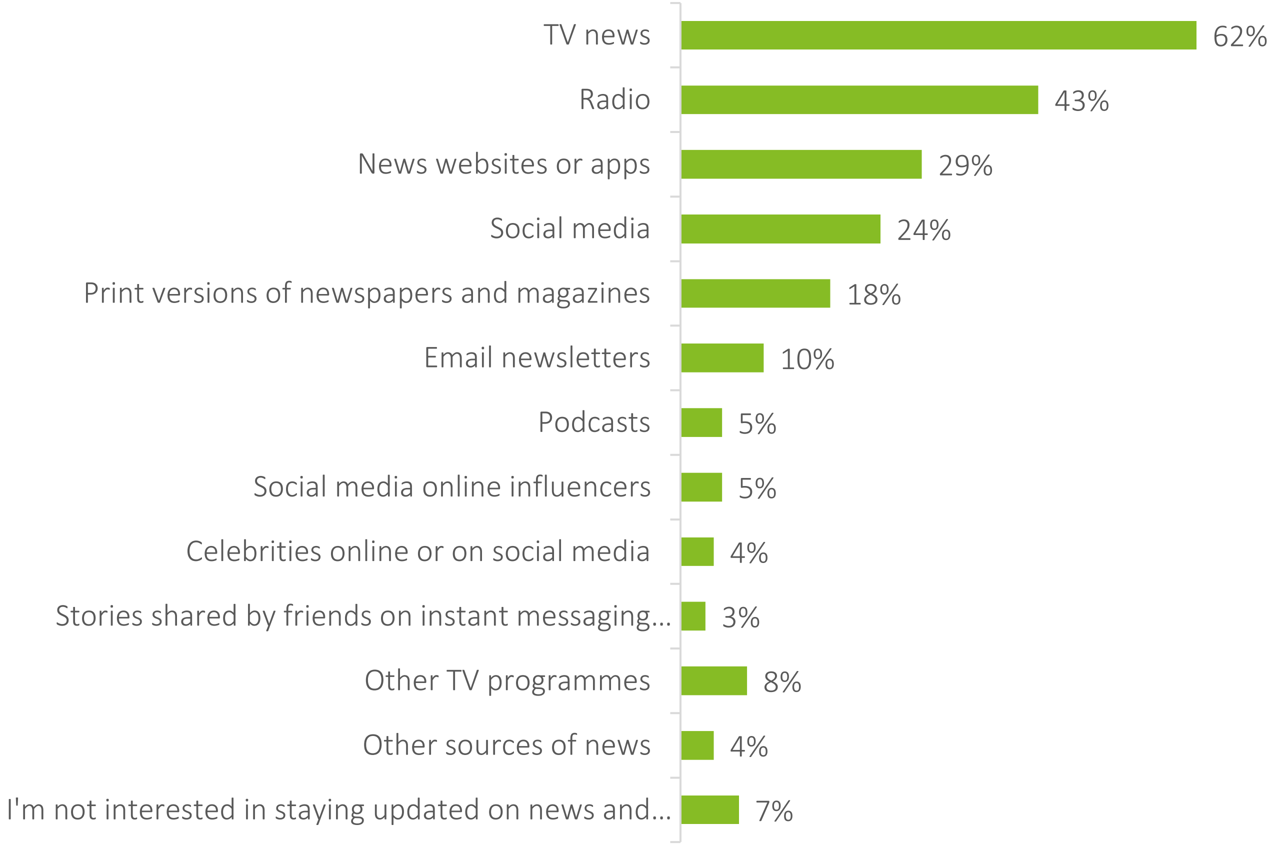
TV remains the primary source of news content for most people, though its importance varies significantly across different age groups

Consumption: Primary sources of news
Which, if any, of the following, are your most preferred methods to stay updated on news or current events?*

TV news remains the dominant source, with 62% of respondents preferring it to stay updated on news or current events.

Traditional media, including radio (43%) and print versions of newspapers/magazines (18%), still play a significant role in how people consume news.

Digital platforms such as news websites/apps (29%) and social media (24%) are also popular, especially among younger audiences, reflecting the growing shift toward online news consumption.

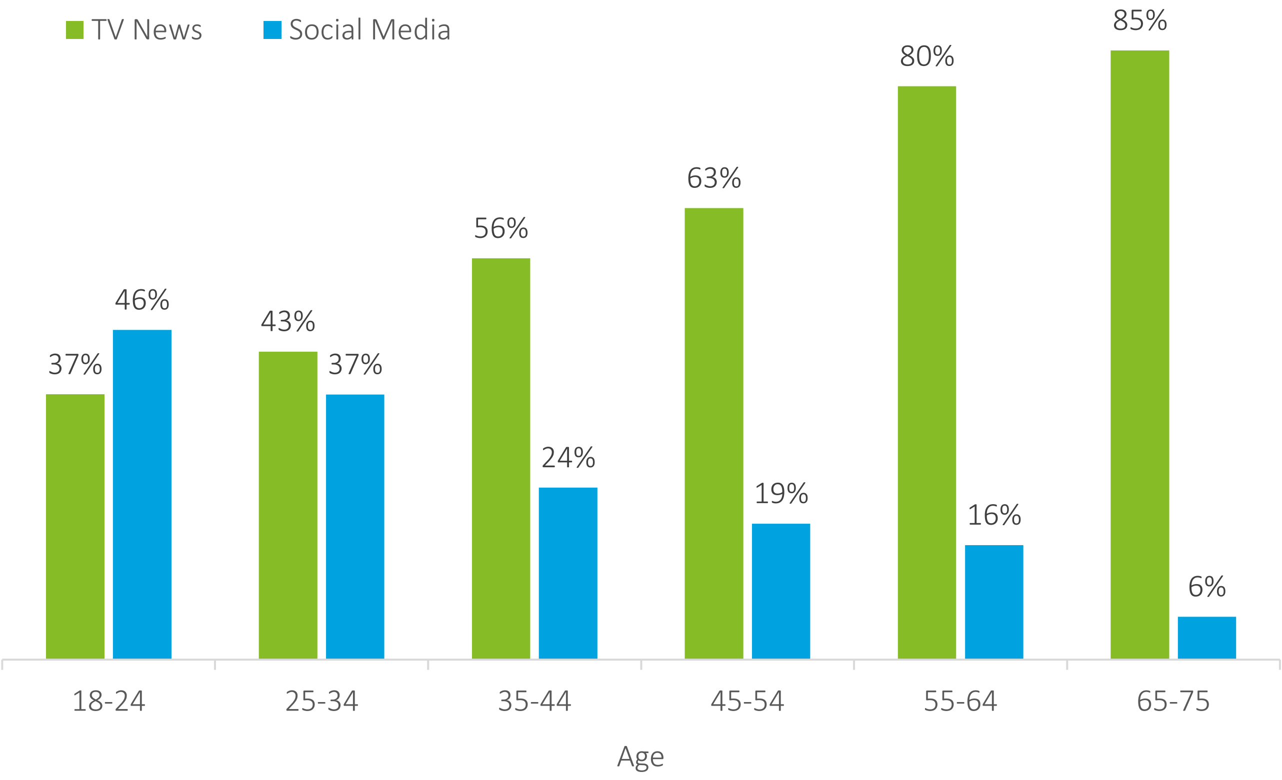


Weighted base: All respondents aged 18-75, 2024 (2,000).
*Respondents were asked to select top three
Source: Deloitte Digital Consumer Trends, BE, June 2024

Younger adults tend to prefer social media to stay updated on news and current events, while older adults rely more on TV news

Consumption: Accessing news on TV or social media

Is TV or social media your preferred source to stay updated on news or current events?*



TV news is favoured more by older age groups, with 85% of those aged 65-75 using it as their preferred news source, compared to just 37% of 18-24-year-olds.

Social media is the dominant news source for younger generations, with 46% of respondents aged 18-24 using it, but this sharply declines to just 6% for those aged 65-75.

As a result, younger adults, favouring social media, may be exposed to more fragmented and potentially less reliable sources of news, leading to differing perspectives on current events.

Meanwhile, older adults, who rely on TV news, are more likely to engage with traditional, established media outlets.

This divide could influence public opinion, political engagement, and societal understanding as different age groups receive and process information through distinctly different channels.

Weighted base: All respondents aged 18-75, 2024 (2,000) Age ranges 2024 : 18-24 (224), 25-34 (364), 35-44 (362), 45-54 (372), 55-64 (372), 65-75 (305)

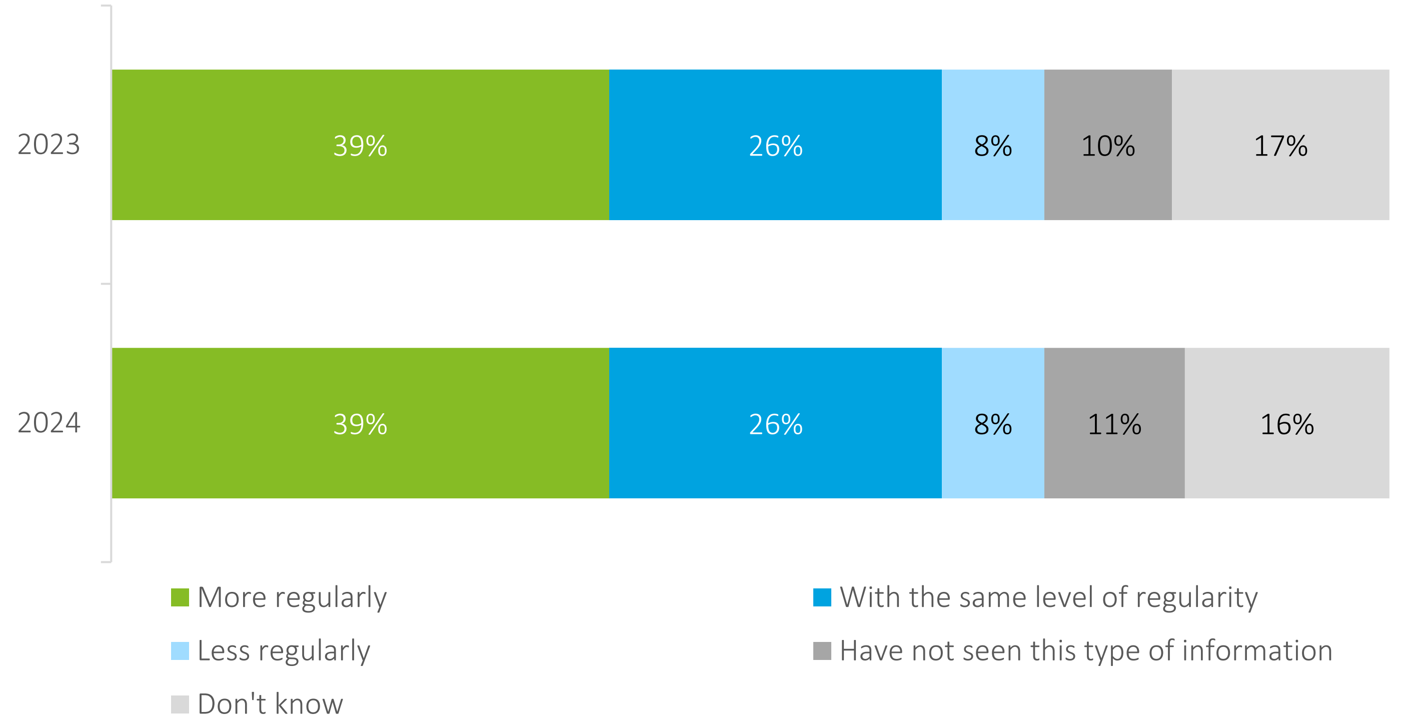
*Original question: Which, if any, of the following, are your most preferred methods to stay updated on news or current events? Respondents were asked to select top three. This analysis focuses on TV and social media responses only.

Source: Deloitte Digital Consumer Trends, BE, June 2024

Perception of online misinformation remains unchanged compared to last year, with the large majority (73%) stating that they have seen information on social media that was subsequently proven to be fake

Consumption: Online misinformation

These days, would you say you are seeing this type of information more or less regularly than you were 12 months ago or are you seeing it with the same level of regularity?*



Perception of online misinformation remains unchanged between 2023 and 2024, with 39% of respondents stating that they see misinformation more regularly than before.

A significant portion (73%) of respondents stated that they have encountered information on social media that was later proven to be to be false.

Awareness of misinformation remains high as 26% report seeing it with the same regularity, and only a small percentage (8%) report seeing it less frequently.

Weighted base: All respondents aged 18-75, 2023 (2,000),2024 (2,000)

*Original question: The next question is about information that is presented to be true on social media but is subsequently proven to be fake. For example, a doctored video, altered photo, untrue articles, misinformation, or content with misleading captions. These days, would you say you are seeing this type of information more or less regularly than you were 12 months ago or are you seeing it with the same level of regularity?

Source: Deloitte Digital Consumer Trends, BE, June 2024

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If you have any questions about the Digital Consumer Trends,
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