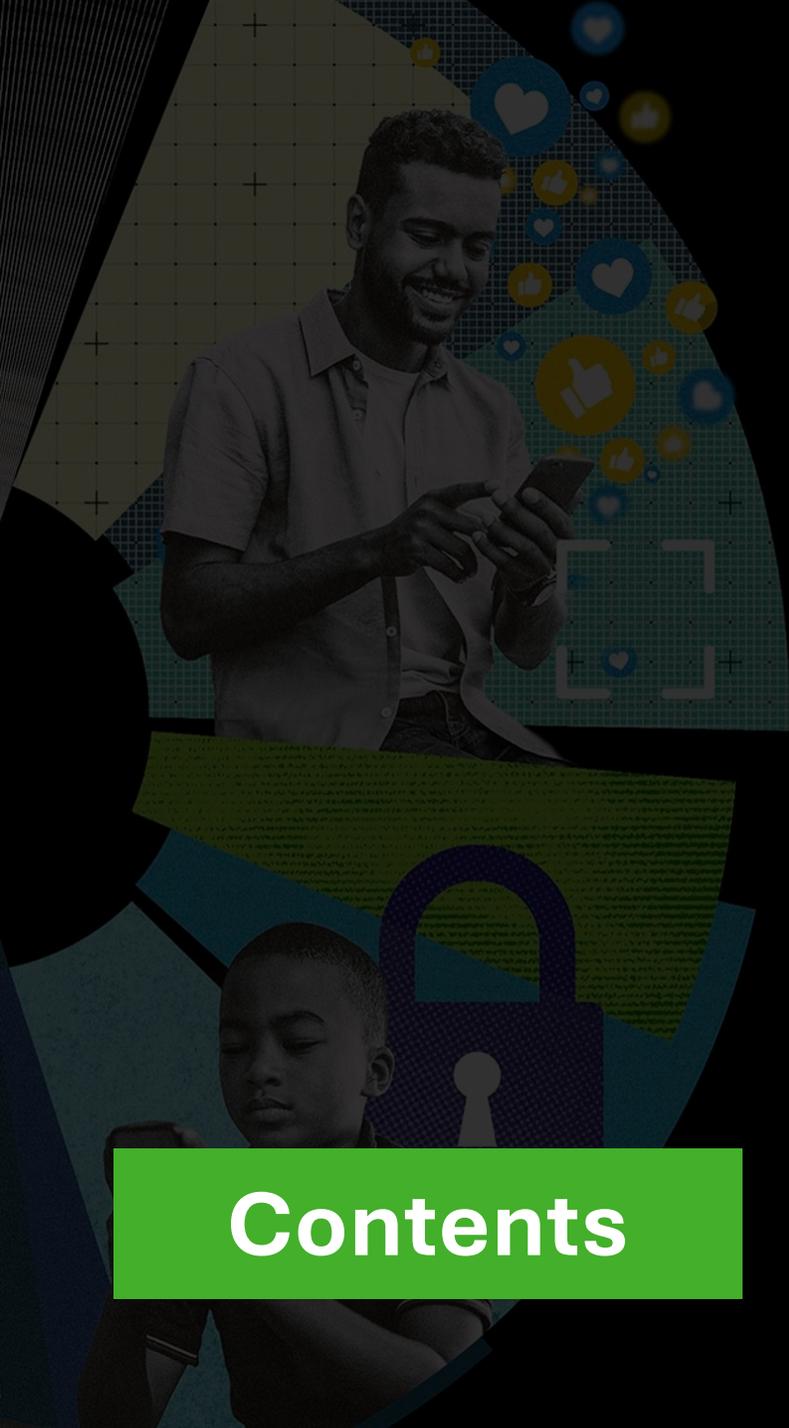




Digital Consumer Trends 2025

Digital Media Consumption Insights

March 2026



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About Deloitte's

Digital Consumer Trends 2025

- Digital Consumer Trends 2025 is conducted by Deloitte's Technology, Media and Telecommunications (TMT) practice.
- 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 sixteenth year of publication.
- For 2025, Deloitte conducted a focused deep dive into digital media consumption in Belgium, analysing digital video, audio and news usage. This specific cut is called Digital Media Consumption Insights.
- Fielded in November 2025 by an independent research agency, the survey was asked of 2,000 consumers in Belgium between 18-75, and weighted for demographics such as age, gender, region and working status.
- Questions cited in this document may be simplified for the sake of visualisation.

As digital media consumption varies significantly by generation, this report segments most analyses by generation using the following definitions

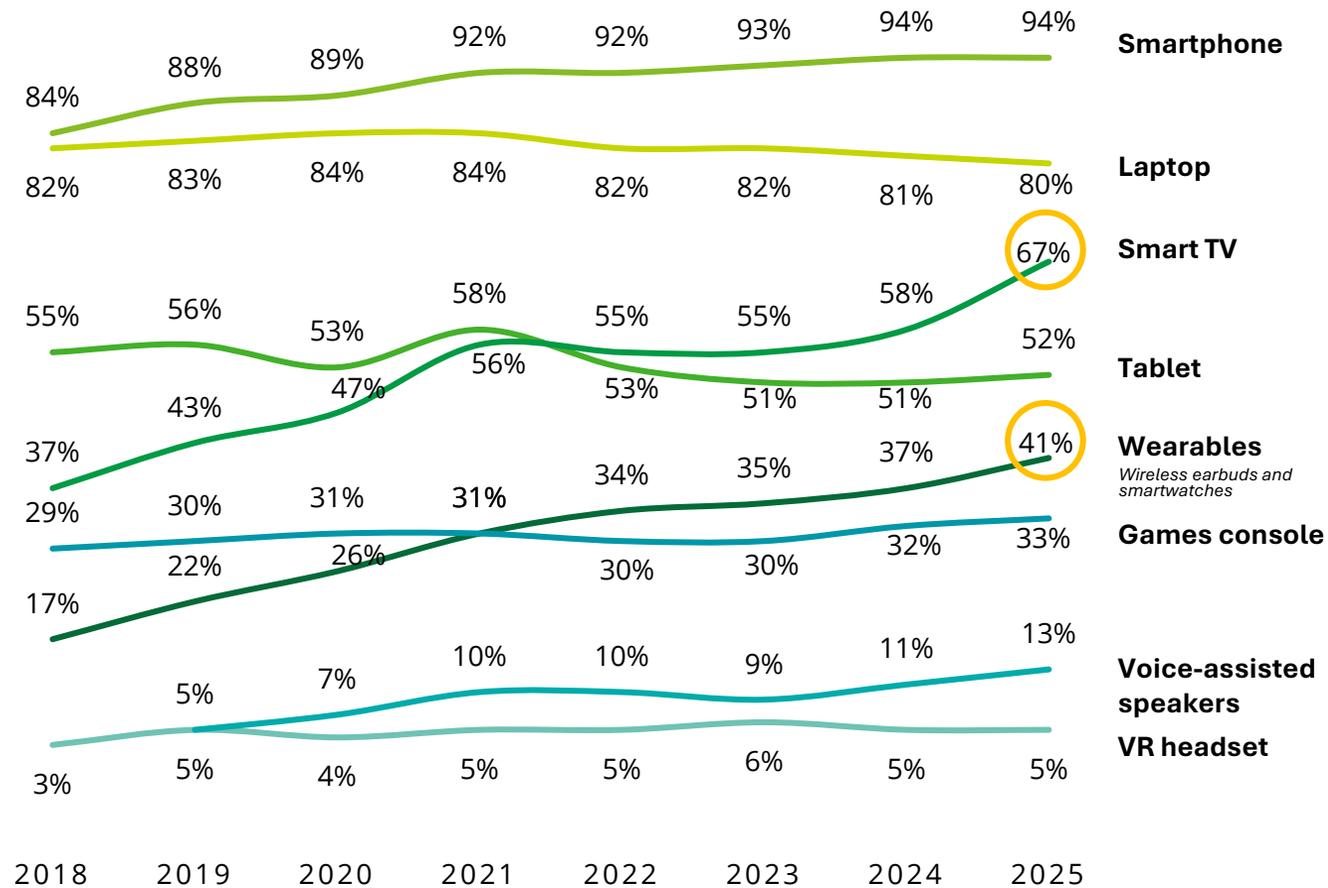
<p>Gen Z BORN 1996 – 2007</p> <p>Age range 18-29</p> 	<p>Millennials BORN 1980 – 1995</p> <p>Age range 30-45</p> 	<p>Gen X BORN 1966 – 1979</p> <p>Age range 46-59</p> 	<p>Baby boomers BORN 1950 – 1965</p> <p>Age range 60-75</p> 
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Deloitte.

Devices & AI

Digital Consumer Trends 2025

Smart TVs and wearables—smartwatches and wireless earbuds—saw record growth in 2025 especially among baby boomers; adoption of other devices was stable



Adoption of smart TVs, wearables, consoles, and voice-assisted speakers hit record highs in 2025, reflecting the growing integration of smart devices at home and on-person.

Smart TV's historic surge confirms that it is becoming a central device at home for content consumption. Broadcasters and streamers are increasingly distributing their apps on smart TVs, bypassing set-top boxes and TV casting devices.

Smart TV, wireless earbuds, and smartwatch adoption has increased the most among baby boomers in 2025, rising 21%, 44% and 43%, respectively, year-on-year.

Laptops seem to be trending down following a plateau period, driven by the growing availability of digital services on smartphones and tablets.

VR headset adoption has not progressed since 2019, even with considerable industry investment, signalling that manufacturers still face maturity and utility barriers.

Question: Which, if any, of the following devices do you own or have ready access to (i.e., that is readily available for you to use)?

Weighted base: All respondents aged 18-75 in 2018 (2,002), 2019 (2,000), 2020 (2,000), 2021 (2,000), 2022 (2,000), 2023 (2,000), 2024 (2,000), 2025 (2,000)

Source: Deloitte Digital Consumers Trends, BE, 2018 – 2026

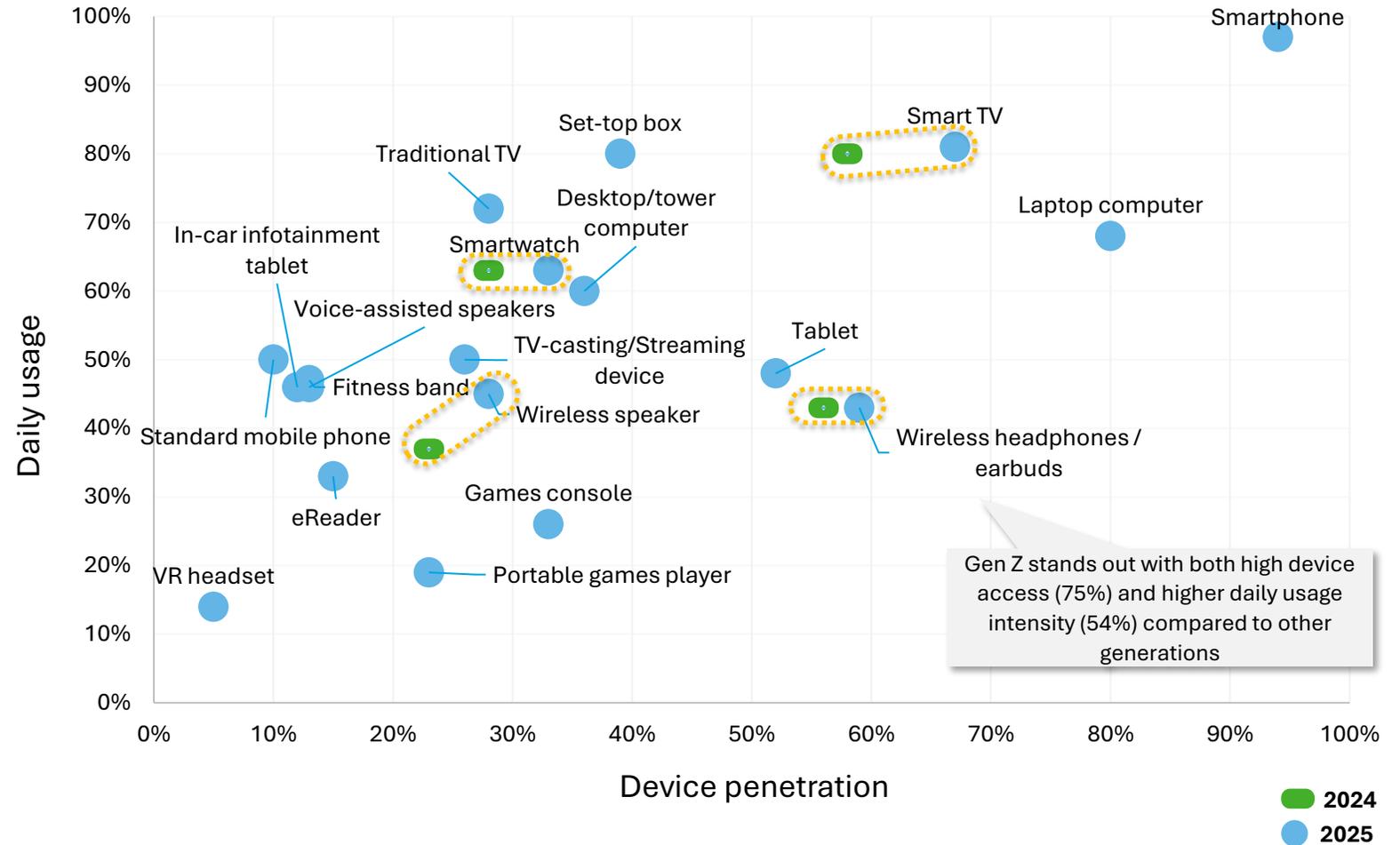
While smartphones remain the dominant device in usage frequency, smart TVs are increasingly becoming part of consumers' daily usage

Nearly all respondents use their smartphones daily, keeping them at the top of the list of most-used devices.

Smart TVs have firmly established themselves as a habitual device in the home, emerging as the second most frequently used screen and reinforcing their role in everyday routines.

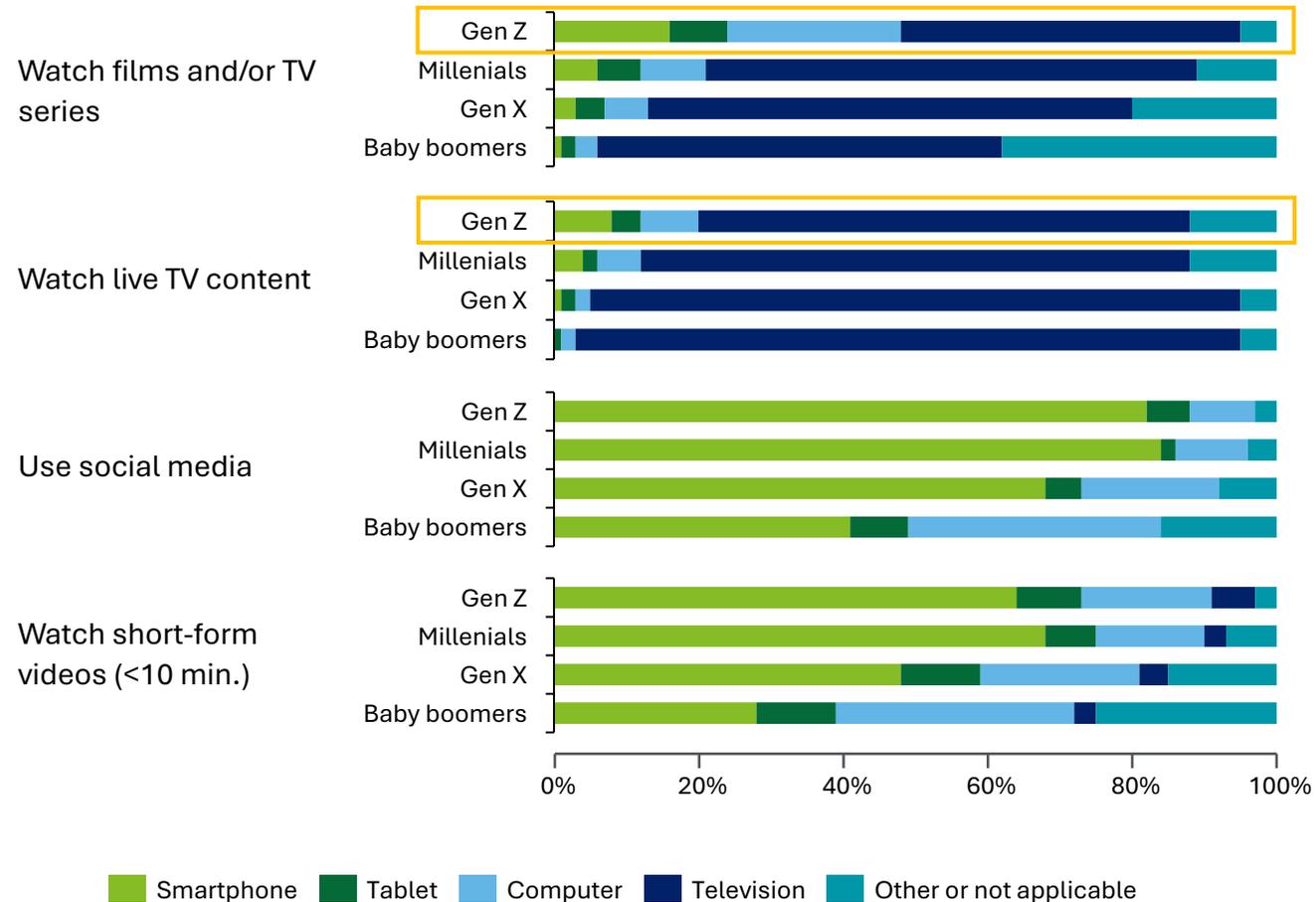
Set-top box penetration at 39% is below reported TV subscriber figures, likely due to users not realising that they're using a set-top box that is hidden behind the smart TV interface.

A generational split is clear in device access, reinforcing that future device ecosystems will be shaped by divergent habits rather than a single dominant usage model.



For Gen Z, the smartphone is taking an increasingly important role in video consumption, including for long-form content

Favourite device according to usage



Question: Which, if any, is your preferred device for each of the following activities?

Weighted base: All respondents aged 18-75, 2025, Gen Z (394), millennials (596), Gen X (494), baby boomers (511)

Source: Deloitte Digital Consumers Trends, BE, 2025

For long-form content, television remains the favourite device for all generations.

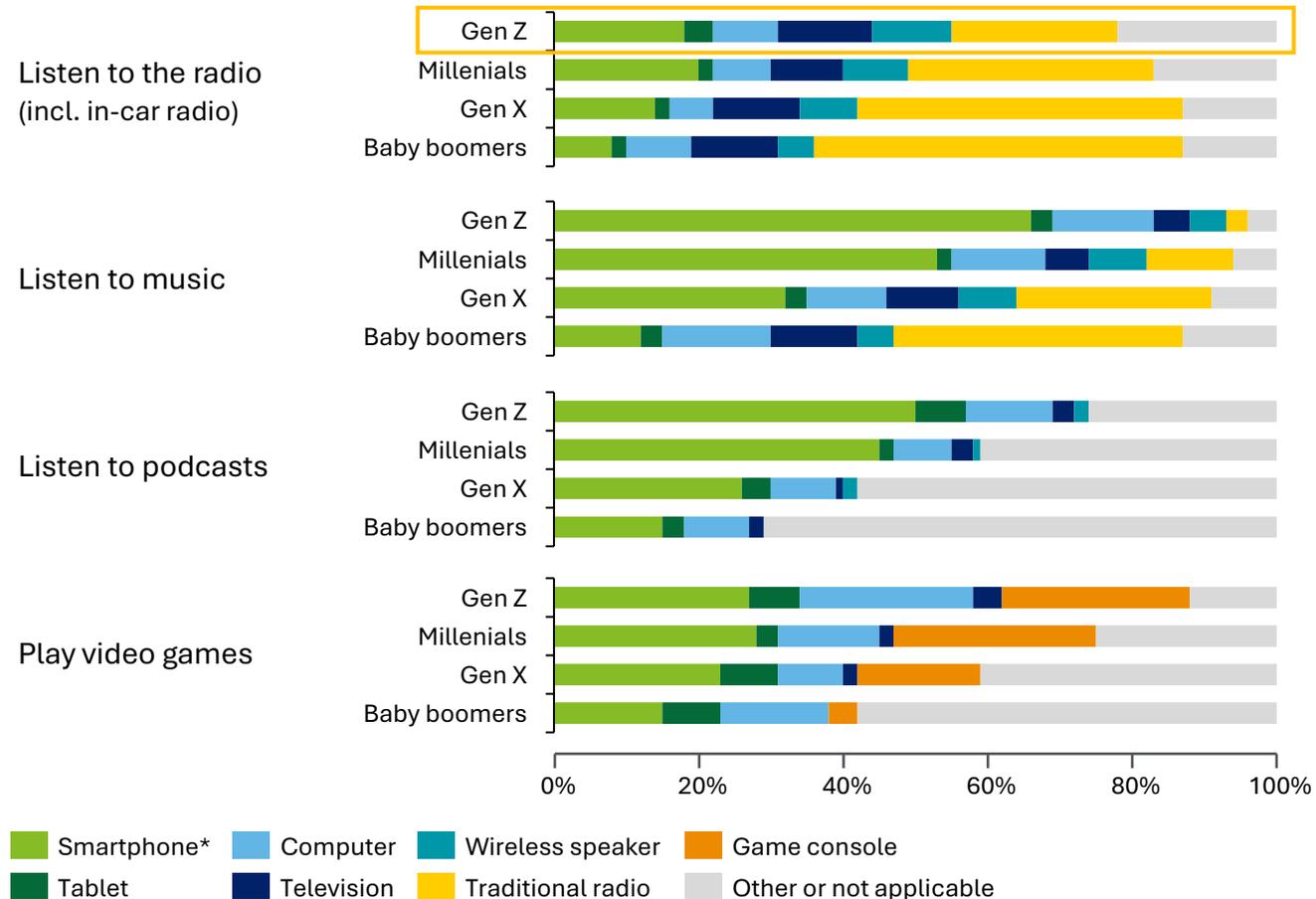
For Gen Z, the smartphone plays a central role across video use cases, extending beyond short-form and social media video into long-form content consumption such as films and/or TV series.

Lower TV appeal among Gen Z is driven by less access to TVs (64% of Gen Z have access to smart TVs, compared with 71% among both millennials and Gen X), more personal media consumption, and increased on-the-go viewing that requires devices better suited than a television.

The tablet, desktop computer, and game console are secondary devices, representing between 1% and 10% depending on usage and generations.

Owing to its versatility, the smartphone rivals dedicated devices for user preference across activities like radio listening and gaming

Favourite device according to usage



Question: Which, if any, is your preferred device for each of the following activities?

Weighted base: All respondents aged 18-75, 2025. Gen Z (394), millennials (596), Gen X (494), baby boomers (511)

Source: Deloitte Digital Consumers Trends, BE, 2025

© 2026 Deloitte Belgium Note(s) : * Smartphones include Apple CarPlay and Android Auto

When listening to radio content, the traditional radio set (incl. in-car radio) remains the favourite device, across generations. However, for Gen Z, the smartphone competes with the traditional radio set as the preferred device.

Live radio remains dominant for in-car use, where the stability of FM/DAB+ is still superior to cellular connectivity.

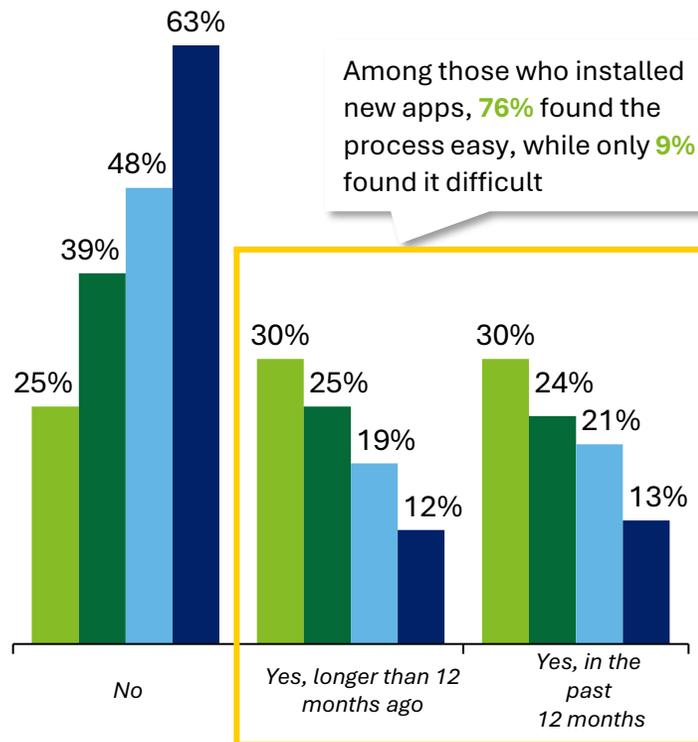
Podcast listening is predominantly mobile, with all the generations favouring smartphones, confirming podcasts as a personal, on-the-go audio format.

While younger Belgians are more likely to be gamers (90% of Gen Z vs. 45% of baby boomers), smartphones, computers and game consoles are the gaming devices of choice across generations. Video gaming device preferences differ by gender, with men favouring consoles (23%) and women favouring smartphones (28%).

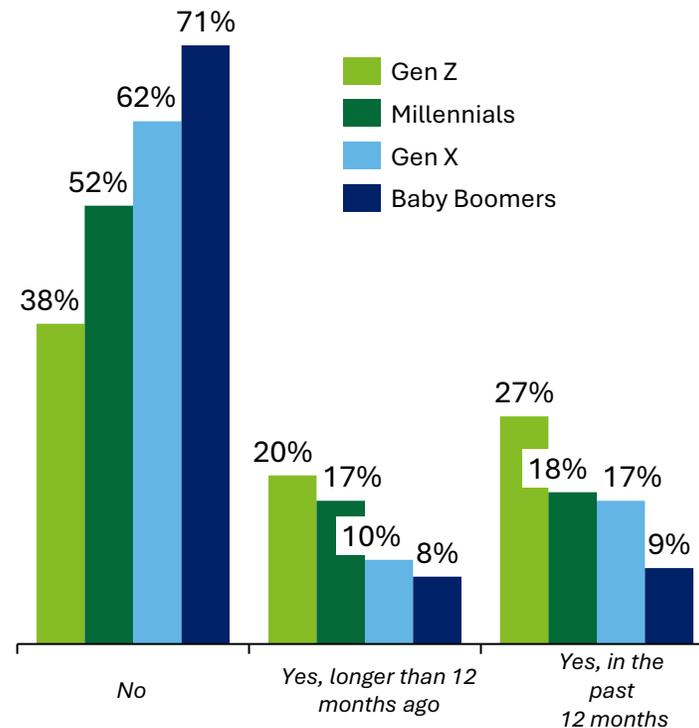
Most users neither install new apps nor customise their smart TV interface, underscoring the importance of pre-installed apps and their placement for local broadcasters

Smart TV configuration conducted by the users

Have you downloaded/installed video streaming apps on your smart TV?



Have you customised the order of video streaming apps on your smart TV?



Smart TV configuration behaviours are generational. Younger users are more likely to download streaming apps and customise app order, while older generations, particularly baby boomers, largely rely on default setups, reinforcing a plug-and-play usage pattern where smart TVs function as fixed interfaces rather than configurable platforms.

This limited configuration is not driven by usability constraints. Installing streaming apps is widely perceived as easy across all age groups, including baby boomers, creating a clear paradox between perceived ease and actual behaviour. This gap suggests that smart TV configuration is shaped more by the motivation to have access to desired services than by technical barriers.

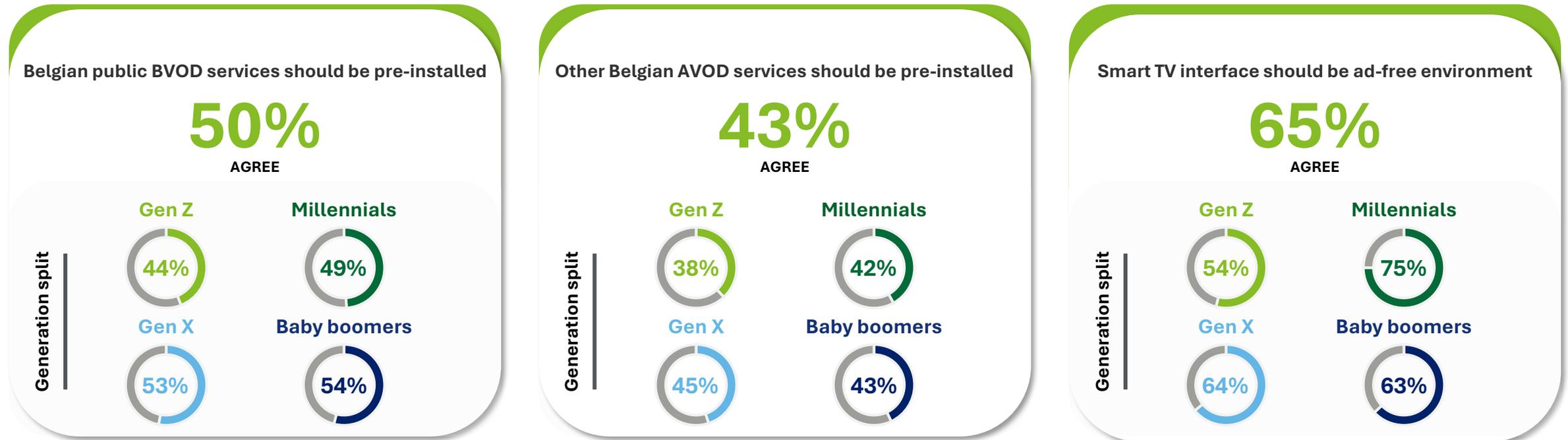
Question: Which, if any, of the following video streaming apps did you install on your TV that weren't pre-installed or available by default?

Weighted base: All respondents aged 18-75, 2025, Gen Z (253), millennials (425), Gen X (349), baby boomers (308)

Source: Deloitte Digital Consumers Trends, BE, 2025

Users view smart TVs as neutral access points and expect local content to be embedded by default

User expectations regarding smart TV apps and interface design



Overall, users expect essential local services, such as public and commercial broadcaster VOD services, to be available by default and reject commercial intrusion at the interface level, reinforcing a utility-first mindset rather than a discovery-led one. Respectively, 16% and 20% of users disagree with pre-installing local public and commercial BVOD apps. Gen Z are less prescriptive about pre-installation because they more frequently configure their smart TVs, reducing the perceived need.

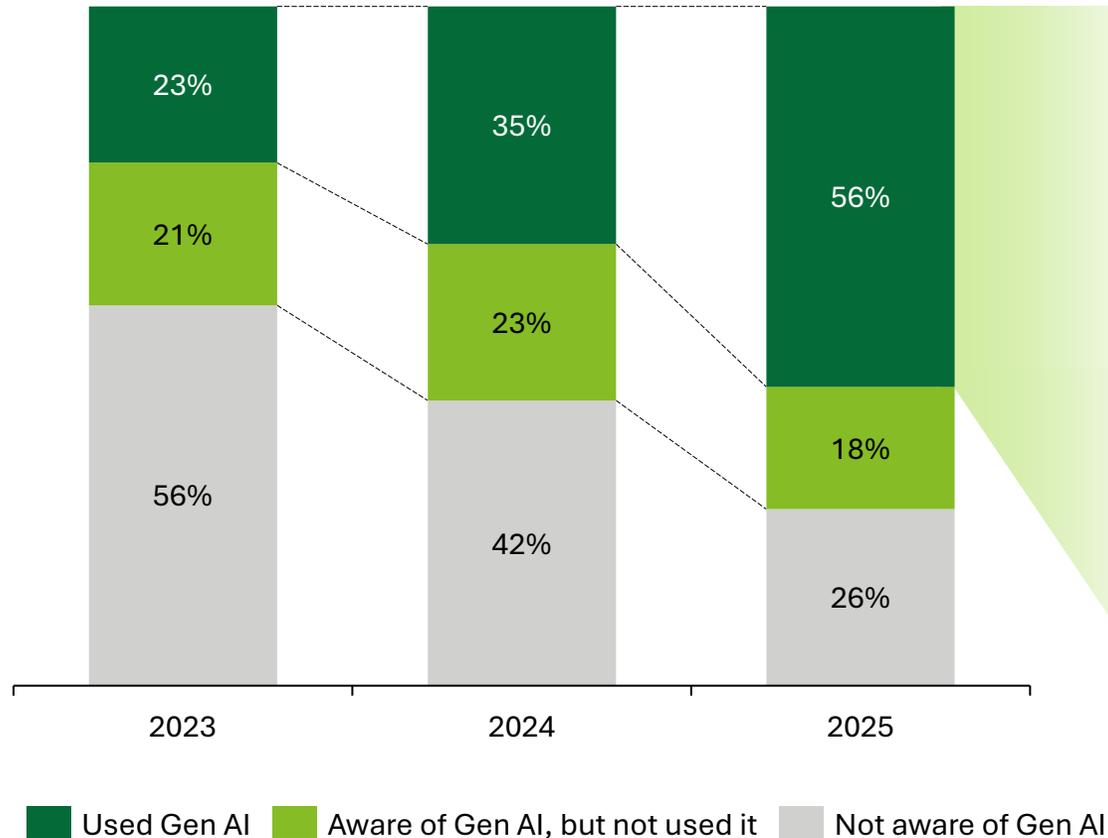
Question: To what extent do you agree, or disagree, with the following statements?

Weighted base: All respondents aged 18-75, 2025, Gen Z (253), millennials (425), Gen X (349), baby boomers (308)

Source: Deloitte Digital Consumers Trends, BE, 2025

In Belgium, generative AI adoption has more than doubled over the past two years, led by students and working professionals

Gen AI awareness and usage evolution



Gen AI usage by working status in 2025



Generative AI is rapidly moving from awareness to widespread usage, with adoption more than doubling since 2023 as it becomes embedded in everyday study and work routines.

Students (85%) and working individuals (64%) are clearly leading this shift, while retirees lag significantly behind with 48% not even aware of Gen AI, highlighting a growing digital divide in exposure and adoption.

Question: Which, if any, of the following generative AI tools are you aware of?

Weighted base: All respondents aged 18-75, 2023 (2,000), 2024 (2,000), 2025 (2,000: 1,164 working, 702 not working, 134 students)

Source: Deloitte Digital Consumers Trends, BE, 2025

The generative AI awareness and usage gender gap narrowed to near parity in 2025

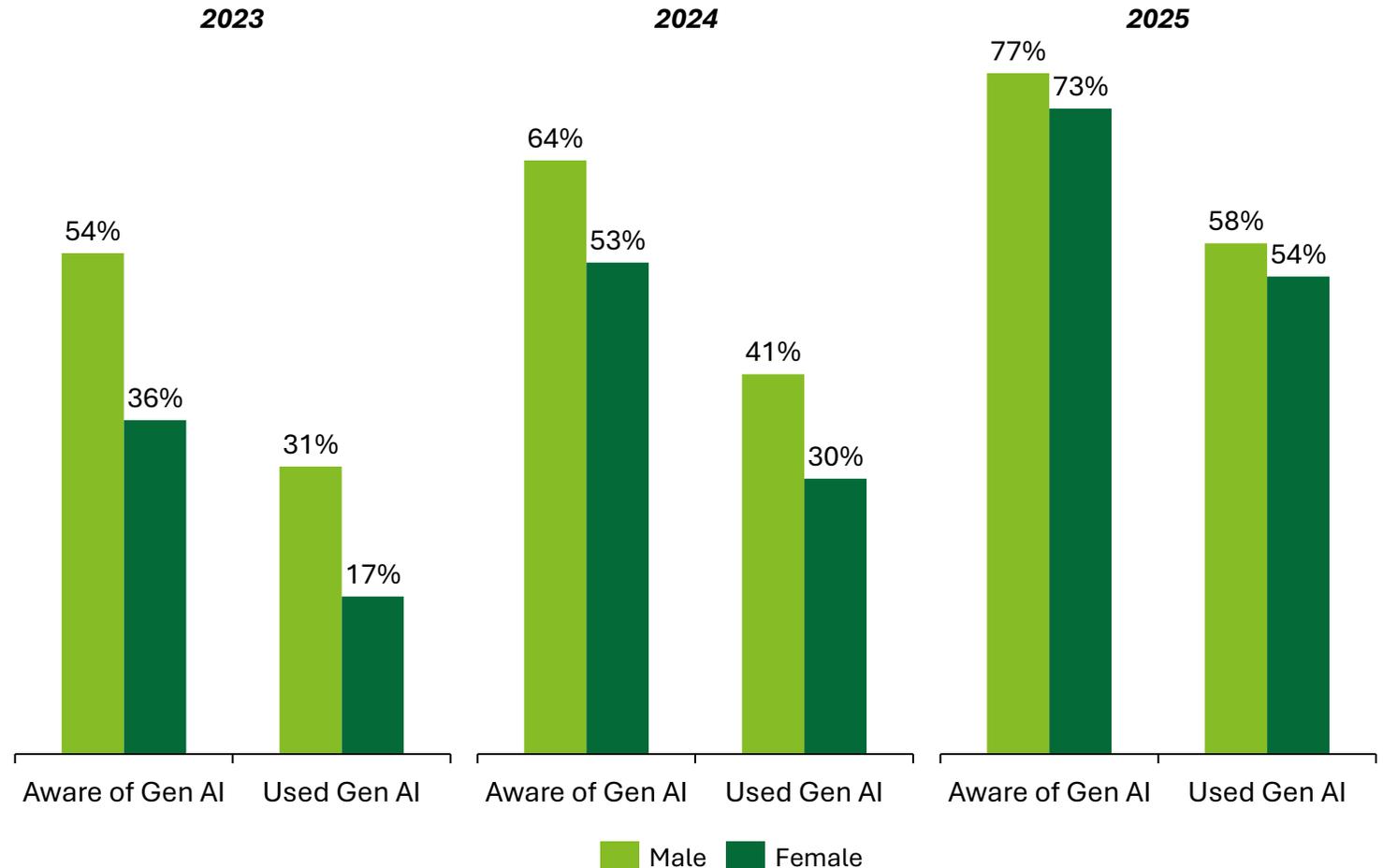
Gen AI awareness and usage evolution



Overall, men demonstrate a slightly higher level of engagement with generative AI tools, with 77% of the male population aware of these technologies, of which 75% have actively used them.



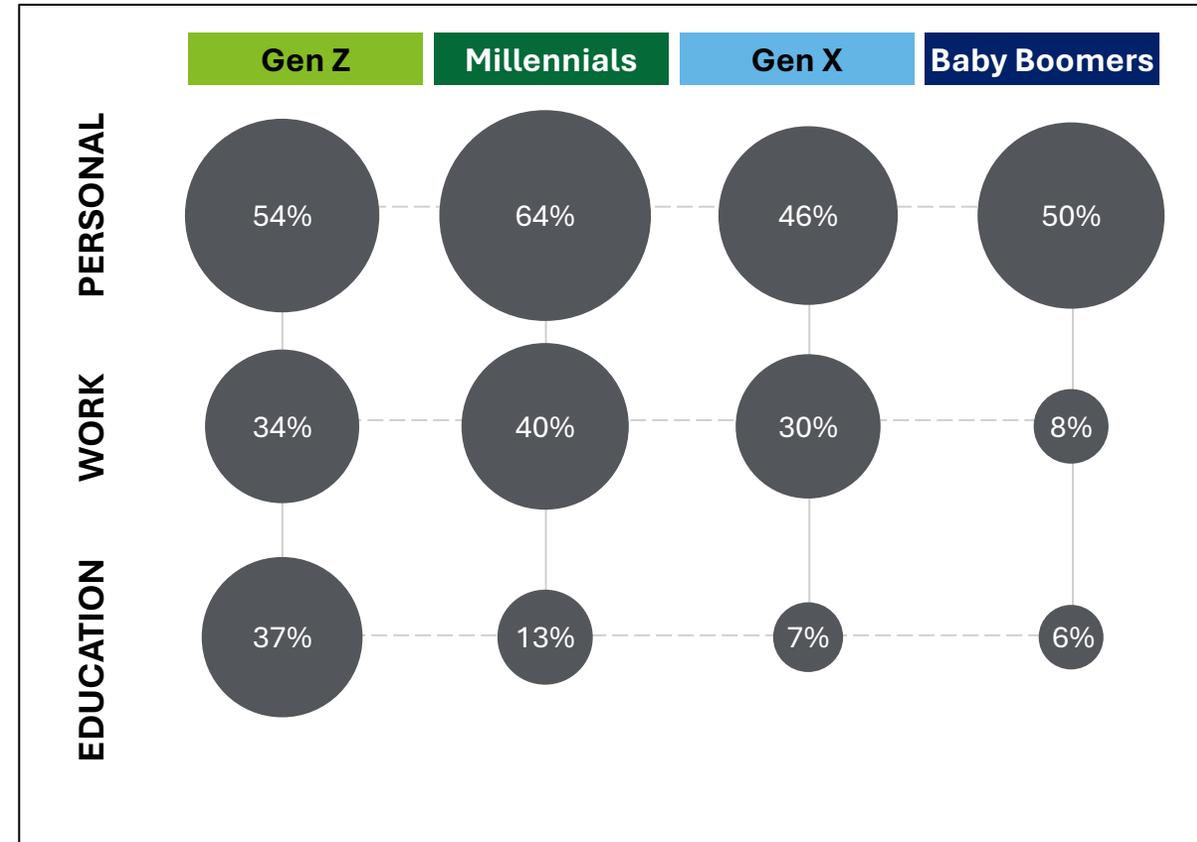
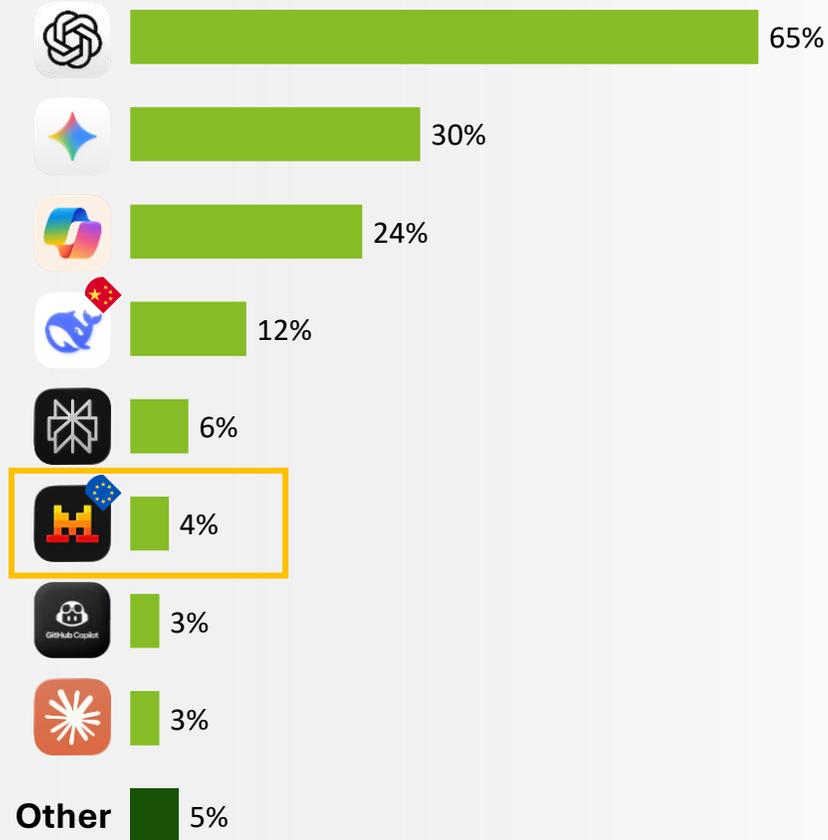
Although women have been slightly slower to adopt, they are rapidly closing the gap. In 2025, 73% of the female population was aware of generative AI tools, and 74% of them had utilised such tools, with both figures increasing at a faster rate compared to men.



Question: Which, if any, of the following Generative AI tools are you aware of?
 Weighted base: All respondents aged 18-75, 2023 (2,000), 2024 (2,000), 2025 (2,000)
 Source: Deloitte Digital Consumers Trends, BE, 2025

Personal use of generative AI drives adoption; Mistral AI, the European solution, lags a plethora of US players and China's DeepSeek

Gen AI tools awareness and adoption across use cases and providers



Question: Which, if any, of the following generative AI tools are you aware of?

Weighted base: All respondents aged 18-75, 2025, Gen Z (397), millennials (597), Gen X (495), baby boomers (511)

Source: Deloitte Digital Consumers Trends, BE, 2025

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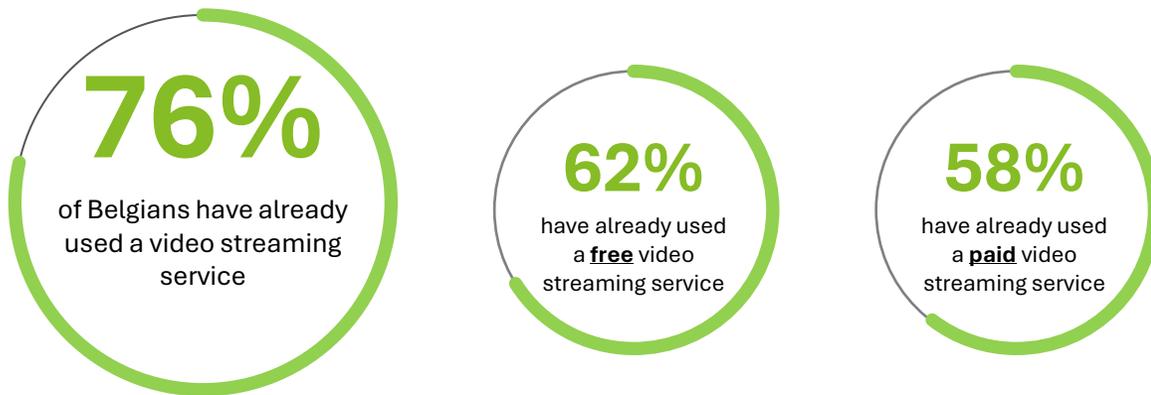
Video

Digital Consumer Trends 2025

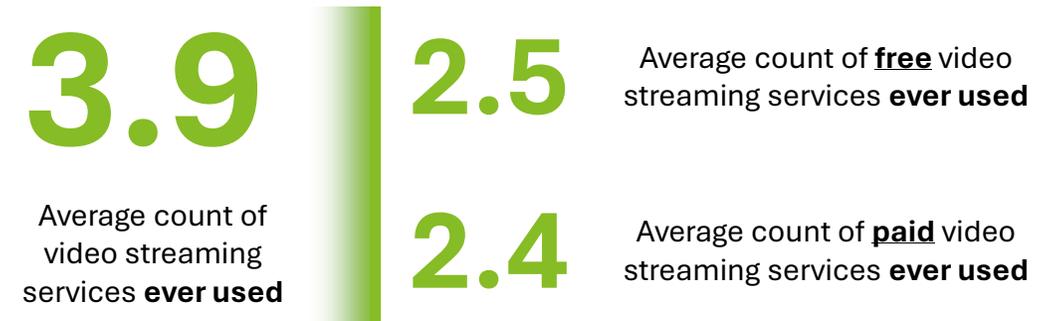


76% of Belgians have already used a video streaming service, and on average they have used four services

Proportion of Belgians that have used a video streaming service



Average count of video streaming services ever used



More than 75% of Belgians have used a video streaming service. This rises to 84% among those under 45. Consumers typically combine both free, ad-supported services (2.5 on average) with paid subscriptions (2.4 on average) to access content spread across multiple catalogs, opting to shop around rather than remain loyal to a single model. Belgians under 45 have used an average of 4.3 services, around 10% above the overall average.

Question: Which, if any, of the following streaming services or apps have you EVER personally used?

Weighted base: All respondents aged 18-75, 2025, (2,000)

Source: Deloitte Digital Consumers Trends, BE, 2025

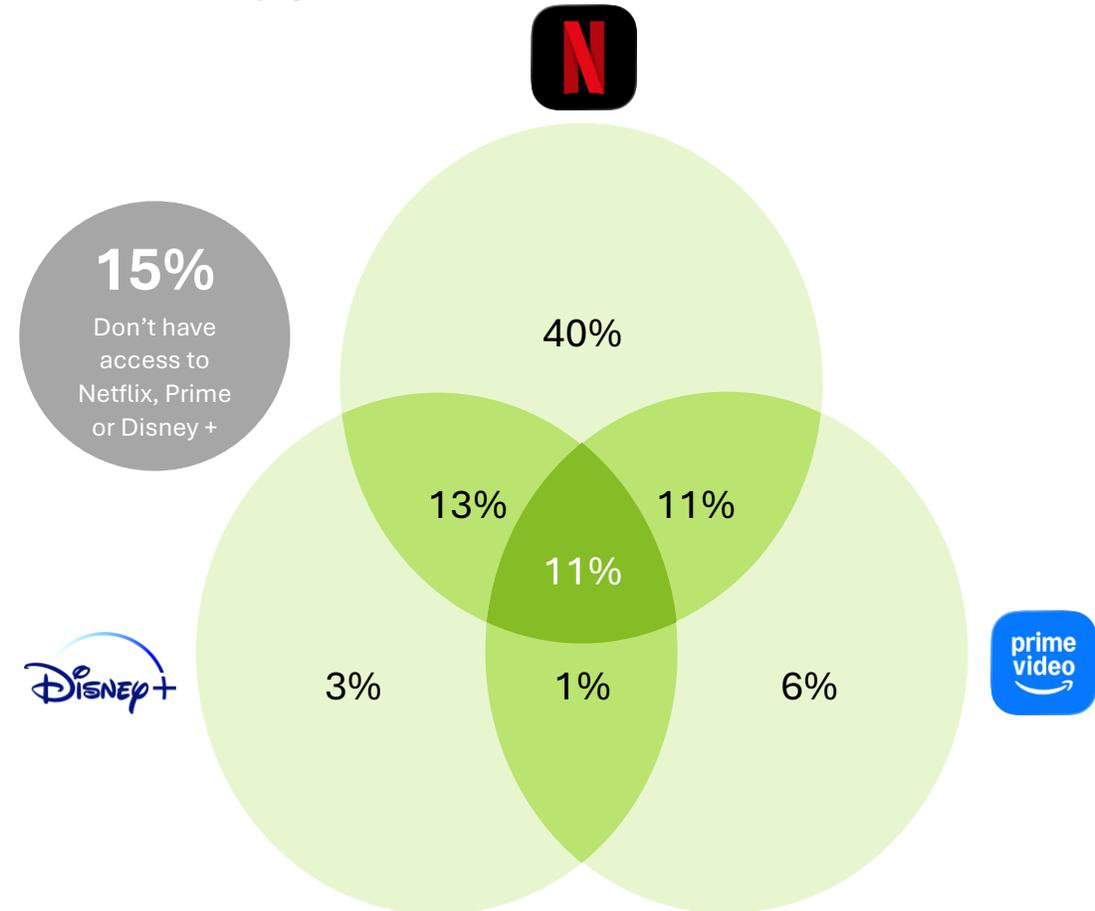
Netflix is the anchor subscription in Belgium, with Prime Video and Disney+ primarily stacking on top rather than competing standalone

Respondents with access to at least one of the three platforms (Netflix, Prime, Disney+)

Netflix is clearly the core subscription service in Belgium. A significant share of respondents subscribe to it exclusively, reinforcing its role as the default entry point into paid video streaming.

Amazon Prime Video and Disney+ operate more as complementary services than standalone competitors. While both reach meaningful penetration, their subscriber bases overlap heavily with Netflix. The Netflix/Disney+ combination is the most substantial dual-platform overlap, followed by Netflix/Prime, confirming Netflix's central position in multi-subscription stacking.

Pure standalone usage of Disney+ or Prime without Netflix remains structurally limited. The three-platform overlap, although less common, highlights the existence of a heavy user segment engaged across major global platforms.



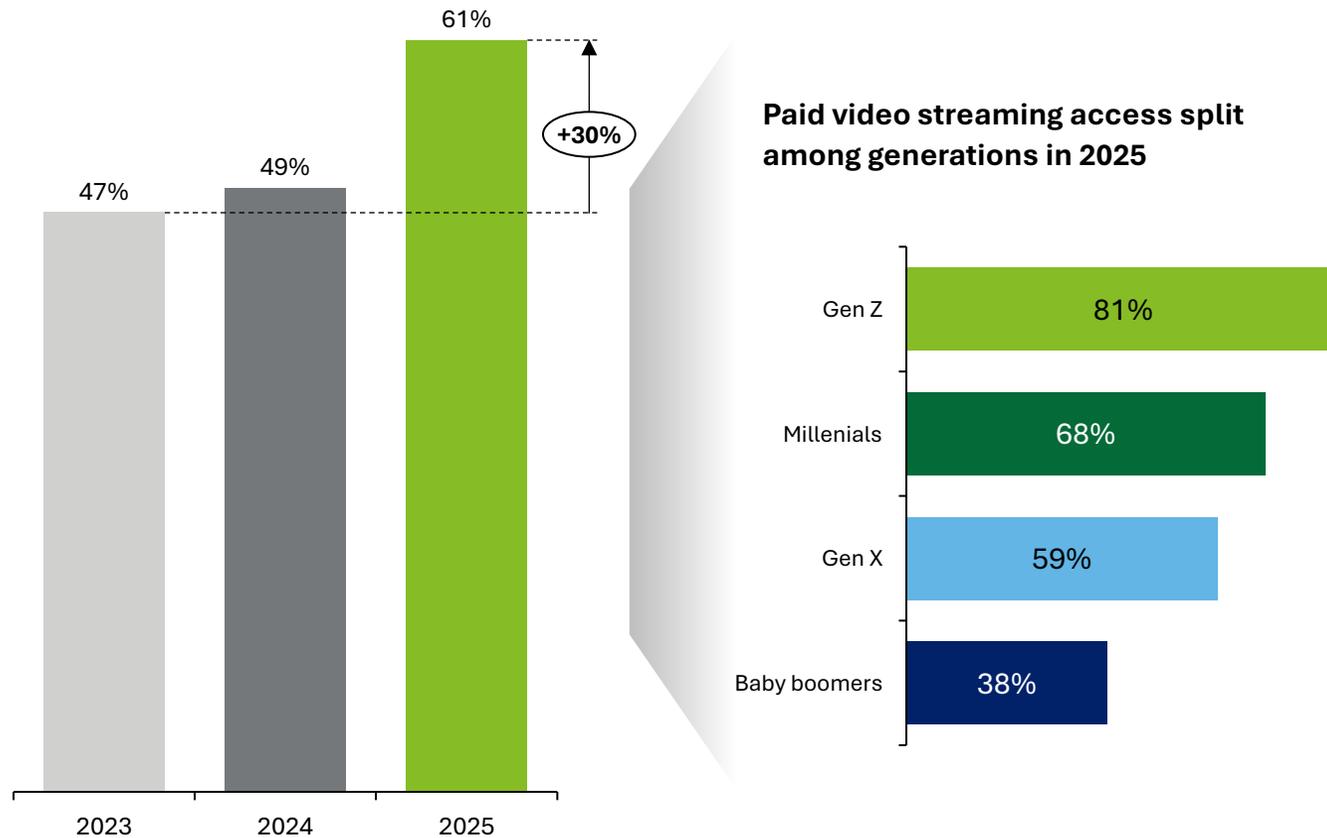
Question: Which, if any, of the following paid digital subscription services do you have access to?

Weighted base: All respondents aged 18-75, 2025, (2,000)

Source: Deloitte Digital Consumers Trends, BE, 2025

Access to paid video streaming continues to rise, mainly driven by younger age groups, but has not yet caught up with penetration rates in neighbouring countries

Paid video streaming services access evolution



Question: Which, if any, of the following paid digital subscription services do you have access to?
 Weighted base: All respondents aged 16-75, 2023 (2,000), 2024 (2,000); All respondents aged 18-75, 2025 (2,000)
 Source: Deloitte Digital Consumers Trends, BE, 2025



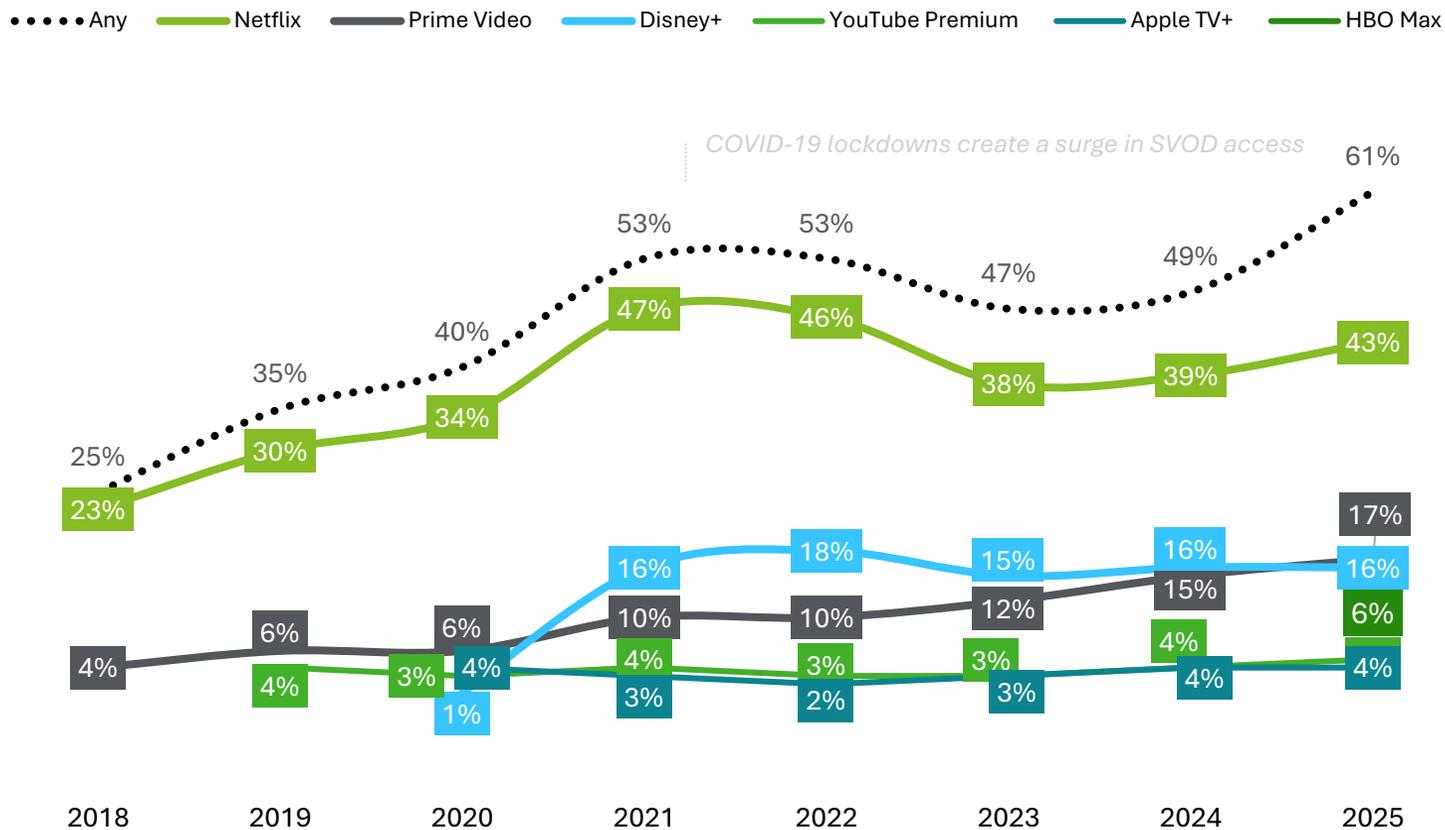
Paid streaming video subscriptions returned to growth in 2025, likely driven by the launch of HBO Max, Netflix's crackdown on password sharing, and Amazon's ongoing push to acquire new Prime members who, in turn, become Prime Video users. Despite the upward trend, video streaming penetration rates in Belgium remain lower than in neighbouring countries like the United Kingdom where 75% of residents have a SVOD subscription.



The stark generational divide in paid video streaming, from Gen Z to baby boomers, reflects the inherent difference between the two generations. Younger cohorts view streaming as a core utility, while older generations face higher friction points due to technological comfort and established media habits.

Netflix and Amazon Prime Video are driving growth in global paid video services in Belgium; Disney+ has slipped a place in the top 3

Access to paying video streaming subscription



Following a slight decline in 2023, access to video-on-demand (VOD) subscription services has risen to a new record, driven primarily by the global streaming platforms. Belgians hold an average of 2.4 SVOD services: typically, Netflix plus one other. As the market matures, competition centres on securing the slot alongside Netflix.

Global streamers are intensifying efforts to win market share by capitalising on churn from rival platforms, acquire new customers among telecom cord-cutters, and optimise ARPU through new plans and bundles (e.g., lower-priced tiers with advertising).

However, Amazon Prime Video also pursues a distinct objective: driving e-commerce user acquisition and retention, while fuelling advertising and product recommendations through first-party purchase intent signals.

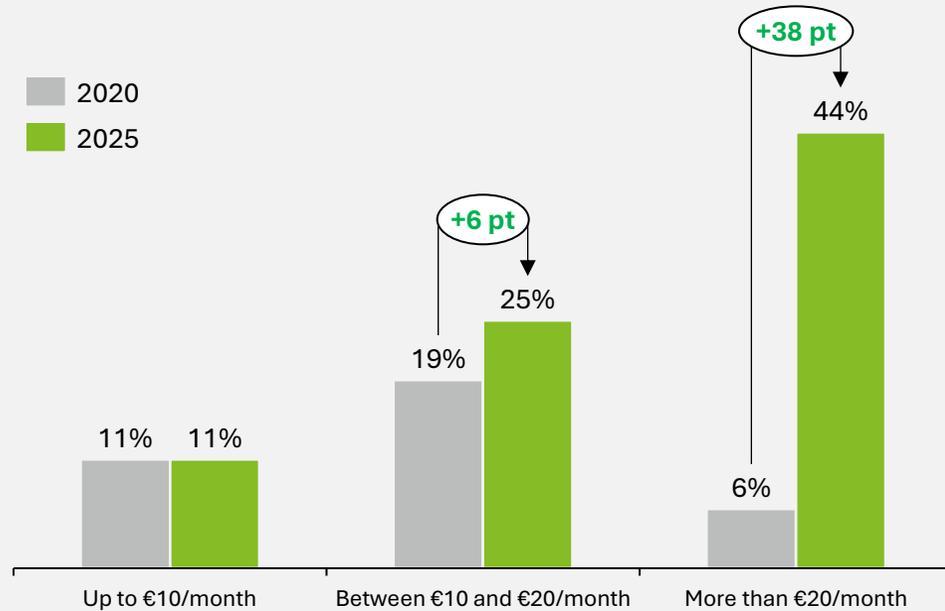
Question: Which, if any, of the following paid digital (video) subscription services do you have access to? Respondents were given choices, including Netflix, Prime Video, Disney +, YouTube Premium and Apple TV+, and others

Weighted base: All respondents aged 16-75, 2018 (2,002), 2019 (2,000), 2020 (999), 2021 (2,000), 2022 (2,000) 2023 (2,000), 2024 (2,000); All respondents aged 18-75, 2025 (2,000)

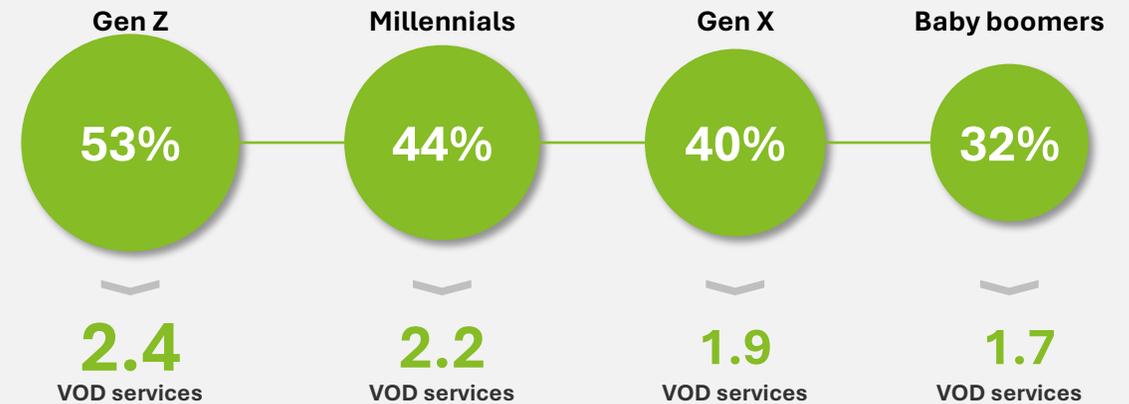
Source: Deloitte Digital Consumers Trends, BE, 2025

Gen Z spend more on video streaming service subscriptions than the rest of the population to access more services than other generations

Video streaming services subscription spending



Proportion of users with monthly video streaming spend above €20 compared with the average number of services they have access to



Since 2020, Belgian households have significantly increased their video streaming budgets, with the share spending more than €20 per month rising from 6% to 44%, and 17% spending over €40. This is explained by 1) a structural redistribution of entertainment spending from traditional TV towards streaming (cord-cutting), 2) Netflix's crackdown on password sharing, which converted some "shadow users" into paying subscribers, 3) consistent price increases, and 4) the arrival of new services (e.g., HBO, Apple TV+), which have expanded consumers' streaming baskets. Gen Z reinforces this trend through higher average service stacking and a greater willingness to spend over €20, likely enabled by larger entertainment budgets associated with cord-never behaviours.

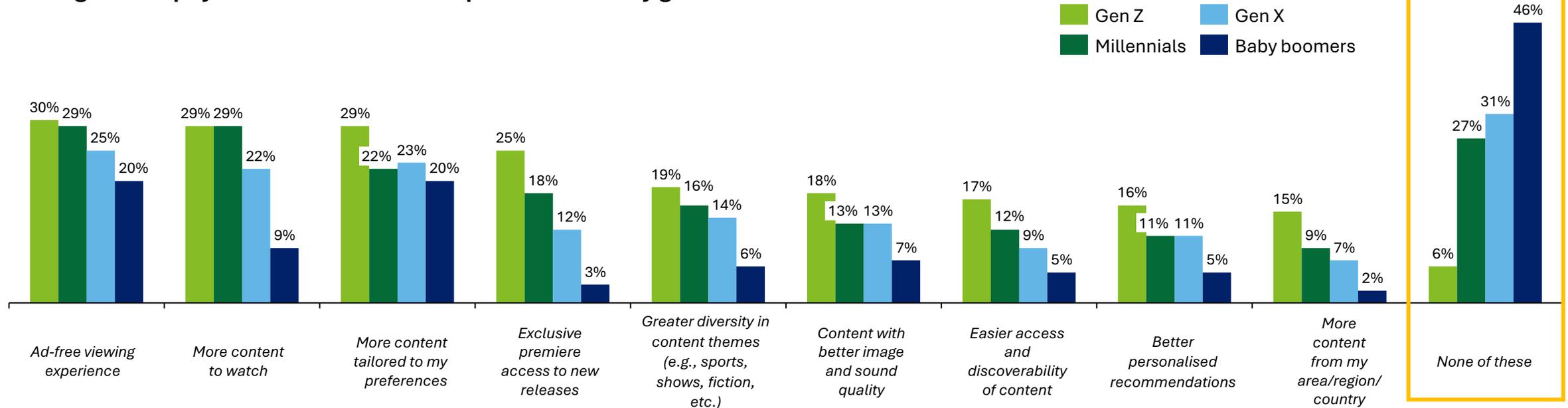
Question: On balance, how much do you/your household typically spend per month on all of your paid video subscription services combined?

Weighted base: All respondents aged 18-75, 2025, Gen Z (343), millennials (476), Gen X (326), baby boomers (230)

Source: Deloitte Digital Consumers Trends, BE, 2025

Users are willing to pay extra for ad-free viewing, more content to watch, and content more tailored to the preferences. However, willingness to pay for these declines with age

Willingness to pay for extra video subscription features by generation



Willingness to pay for premium video features declines steadily with age. Gen Z and millennials show the strongest interest in paying extra for an ad-free experience, more content to watch, and content tailored to their preferences, reflecting higher expectations around personalisation and breadth of choice.

By contrast, reluctance increases sharply among older cohorts: 46% of baby boomers state they would not pay extra for any of the proposed features. This confirms a structurally lower perceived value of premium add-ons among older users, who prioritise simplicity and controlled spending over feature enhancement.

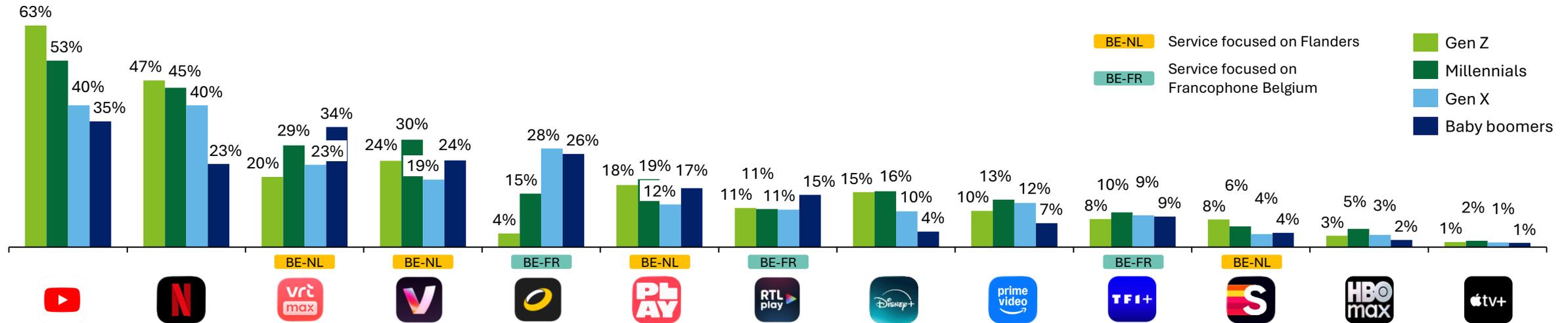
Question: Which, if any, of the following types of content, access to content or experiences would encourage you to increase your monthly spend on video subscription services?

Weighted base: All respondents aged 18-75, 2025. Gen Z (289), millennials (390), Gen X (251), baby boomers (151), North (619), South (336), Centre (127)

Source: Deloitte Digital Consumers Trends, BE, 2025

YouTube is Belgium's most-used video service on a weekly basis, with Netflix in second place. Local broadcasters remain competitive with six BVOD platforms in the top 10

Video streaming services usage (weekly usage of the service by geography, i.e., Belgium, Flanders or Francophone Belgium depending on the service)



Younger users favour international platforms like Netflix, YouTube and Disney+, while older audiences are more prevalent on broadcaster services such as VRT Max, VTM Go, RTBF Auvio and RTL play. This demonstrates how content strategy and brand lineage shape audience profiles. Private BVODs (VTM Go, RTL play) attract younger viewers more than public BVODs (RTBF Auvio, VRT Max). Launched in July 2024, HBO Max remains a minor player, and its future in Belgium will largely depend on the ambitions of its incoming shareholders.

Question: Which, if any, of the following streaming services or apps do you personally use at least once a week?

Weighted base: All respondents aged 18-75, 2025. Gen Z (342), millennials (507), Gen X (377), baby boomers (341)

Source: Deloitte Digital Consumers Trends, BE, 2025

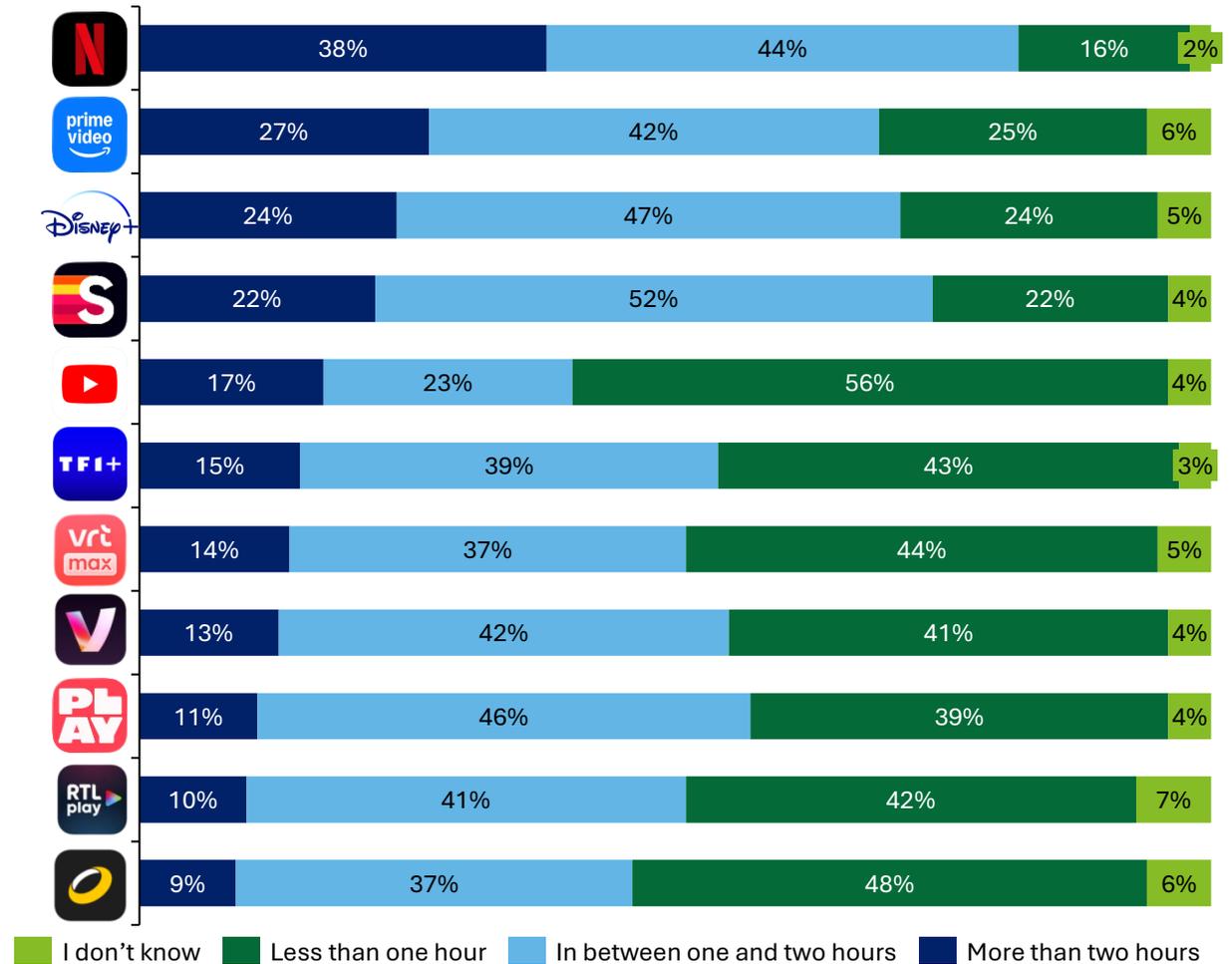
Viewing sessions tend to be longer on international VOD platforms than on local BVOD services, whereas YouTube has a high volume of short sessions given its catalogue structure

Average consumption session time on video streaming services

International SVODs (e.g., Netflix, Prime Video) consistently achieve longer viewing sessions, with many users exceeding two hours. This indicates strong immersion and binge-watching.

Local broadcasters (e.g., VRT MAX, VTM GO) are associated with shorter viewing sessions, suggesting a purpose-driven consumption intent (catch-up viewing and known content), with likely less subsequent viewing activity.

YouTube stands out with a bite-sized, short-form content consumption model, as most users engage for less than one hour. This reflects its unique user-generated content ecosystem and the broader creator economy, where content formats tend to be shorter.



Question: In a day when you are watching the following video streaming services, on average, how much time do you spend watching each one?

Weighted base: All respondents aged 18-75, 2025, (703)

Source: Deloitte Digital Consumers Trends, BE, 2025

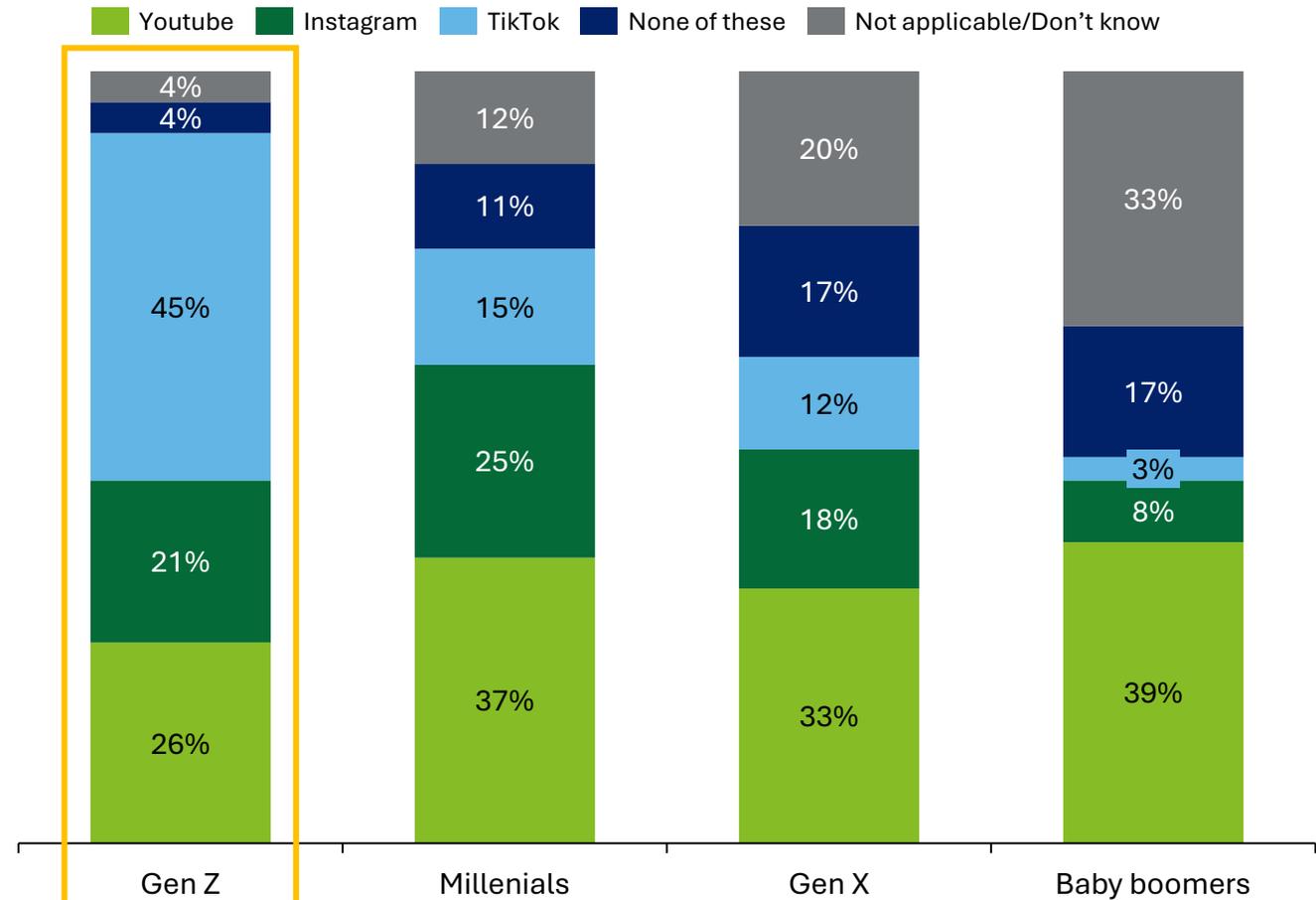
Short-form video consumption is structurally split by generation, with TikTok and YouTube serving distinct age segments

Short-form video platform preferences

The platform choice for short-form video (< 10 minutes) is strongly generational. TikTok clearly dominates among Gen Z, reflecting its central role in shaping the short-form habits and discovery behaviours of younger audiences.

For all older generations, YouTube remains the primary destination for short-form content, confirming its position as the established and cross-generational platform for lighter and utility-driven video consumption.

YouTube is boosting its Shorts to compete with TikTok and reach Gen Z, directing users to Shorts on mobile and TV. The service uses Shorts to attract new viewers and funnel them to longer content for better engagement and revenue. Creators benefit from easy-to-use tools to repurpose long videos into short clips.



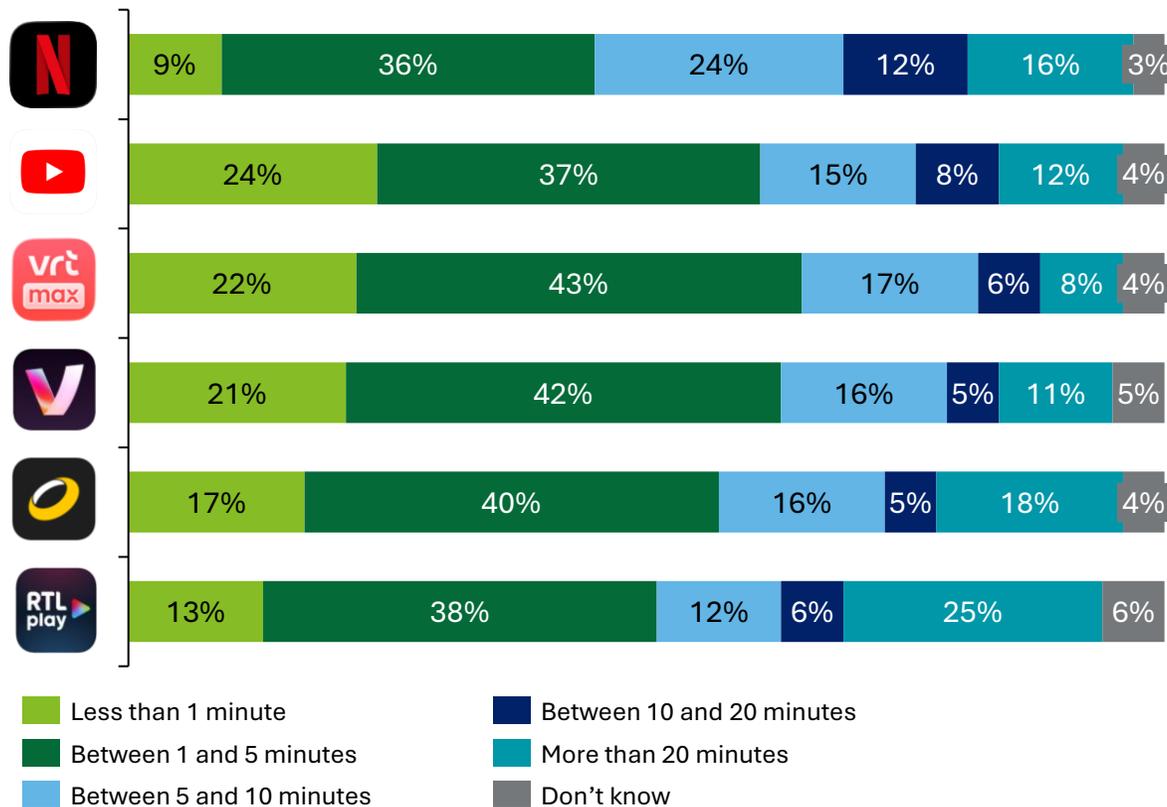
Question: Which, if any, of the following video streaming services do you prefer to use when watching a short-form video?

Weighted base: All respondents aged 18-75, 2025. Gen Z (337), millennials (487), Gen X (354), baby boomers (300)

Source: Deloitte Digital Consumers Trends, BE, 2025

Users face shorter time-to-content on local platforms, suggesting a stronger consumption intent compared to the serendipitous catalog exploration encouraged by global players

Time required to find content on video streaming platforms



The time it takes for users to find content varies significantly by platform, revealing different user behaviours and potential challenges like the ‘paradox of choice.’

Platforms with more focused or locally oriented catalogues enable faster decision-making, suggesting habitual viewing, clearer positioning, more purpose-driven consumption intent (catch-up viewing and known content), or more constrained choice of content. By contrast, platforms with very large and diverse catalogues, particularly international SVODs, are associated with longer discovery times. These platforms position themselves as entertainment destinations, promoting serendipitous discovery when users browse without a specific title in mind.

This indicates that breadth of choice can become a barrier, increasing decision fatigue, potentially delaying or diluting the viewing experience.

Question: When watching content on the following video streaming services that you use at least once a month, on average, how much time does it take for you to find content you want to watch?

Weighted base: All respondents aged 18-75, 2025, (703)

Source: Deloitte Digital Consumers Trends, BE, 2025

Deloitte.

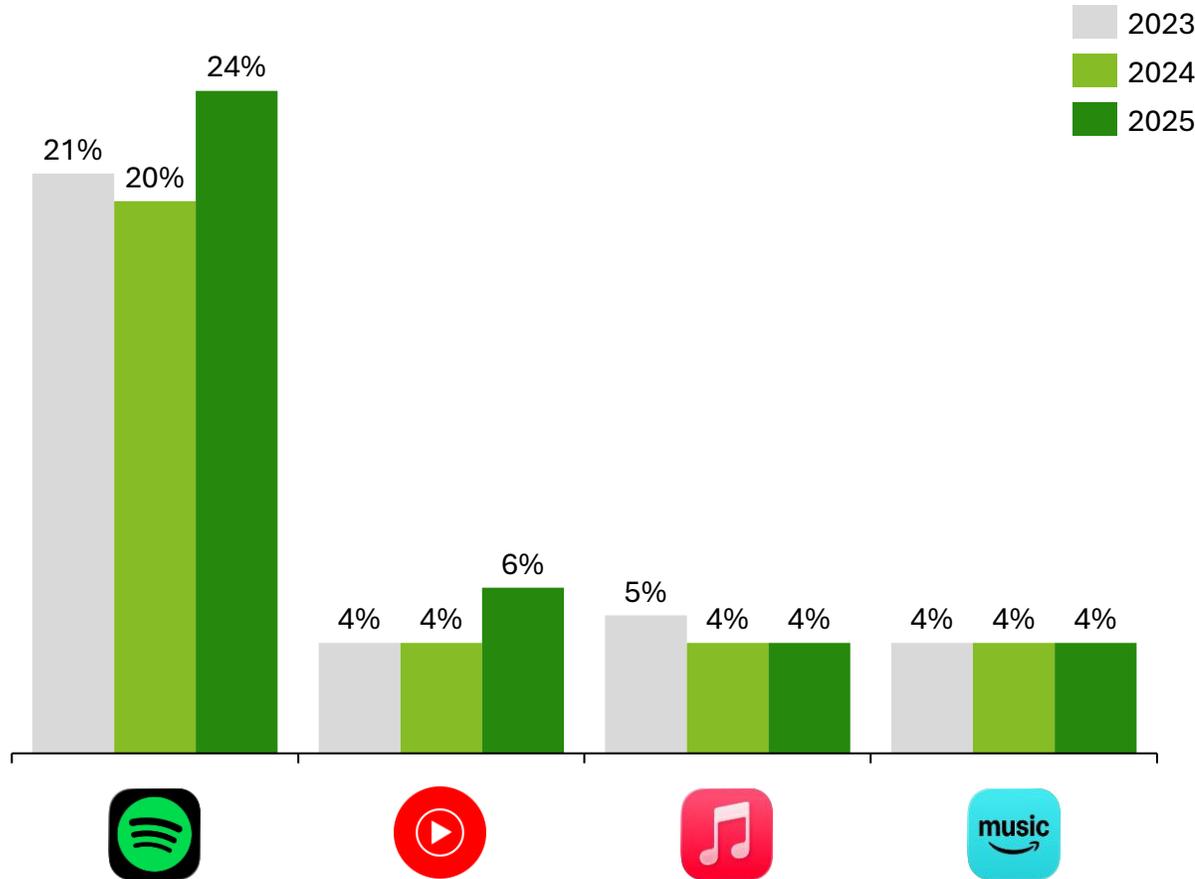


Audio

Digital Consumer Trends 2025

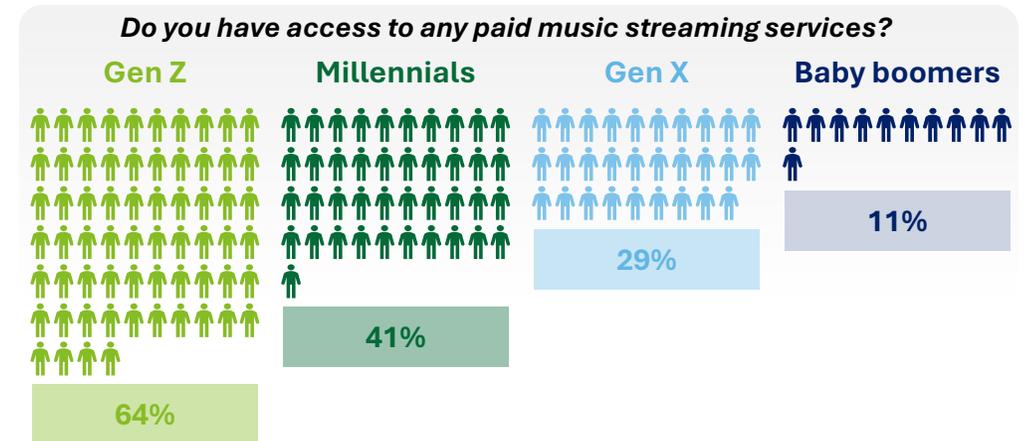
Access to music streaming services is increasing, with Spotify maintaining its dominance as the leading platform and Apple Music has slipped a place in the top 3

Access to paid music streaming services



Access to paid music streaming continues to rise, confirming that music subscriptions are perceived as a high-value, low-substitutability service rather than a discretionary add-on. Penetration is highest among Gen Z and millennials, while adoption drops sharply among older cohorts.

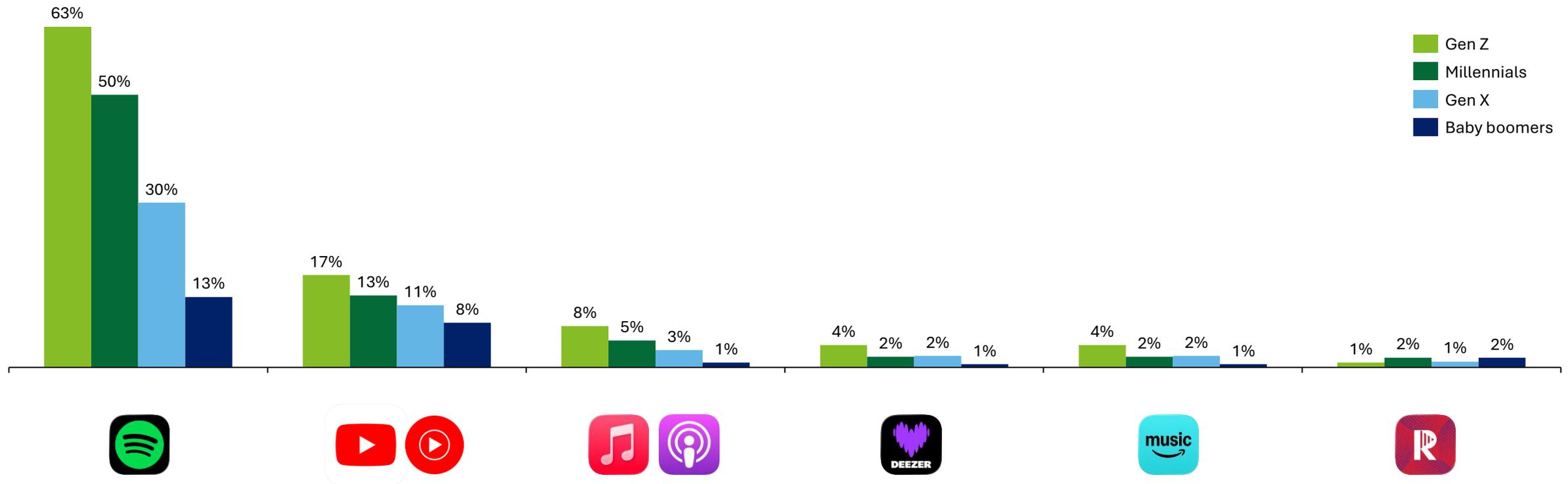
Spotify’s sustained dominance reflects a strong ecosystem lock-in. Features such as playlists and listening history raise switching costs, reinforcing long-term loyalty even as alternatives remain available.



Question: 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), 2025 (2,000)
 Source: Deloitte Digital Consumers Trends, BE, 2025

Spotify is the most-used weekly audio service in Belgium, followed by YouTube Music; Radioplayer, the local radio streaming platform, is used weekly by 1% of the population

Audio streaming services usage (weekly usage of the service)



Spotify leads Belgium's audio streaming market, with 40% using it weekly, followed by YouTube at 13%. Radioplayer, the local radio service, has limited traction overall but skews toward older users. There is a marked generational split: 63% of Gen Z use Spotify weekly, compared with just 13% of baby boomers.

Question: Which, if any, of the following streaming services or apps do you personally use at least once a week?

Weighted base: All respondents aged 18-75, 2025, Gen Z (342), millennials (507), Gen X (377), baby boomers (341)

Source: Deloitte Digital Consumers Trends, BE, 2025

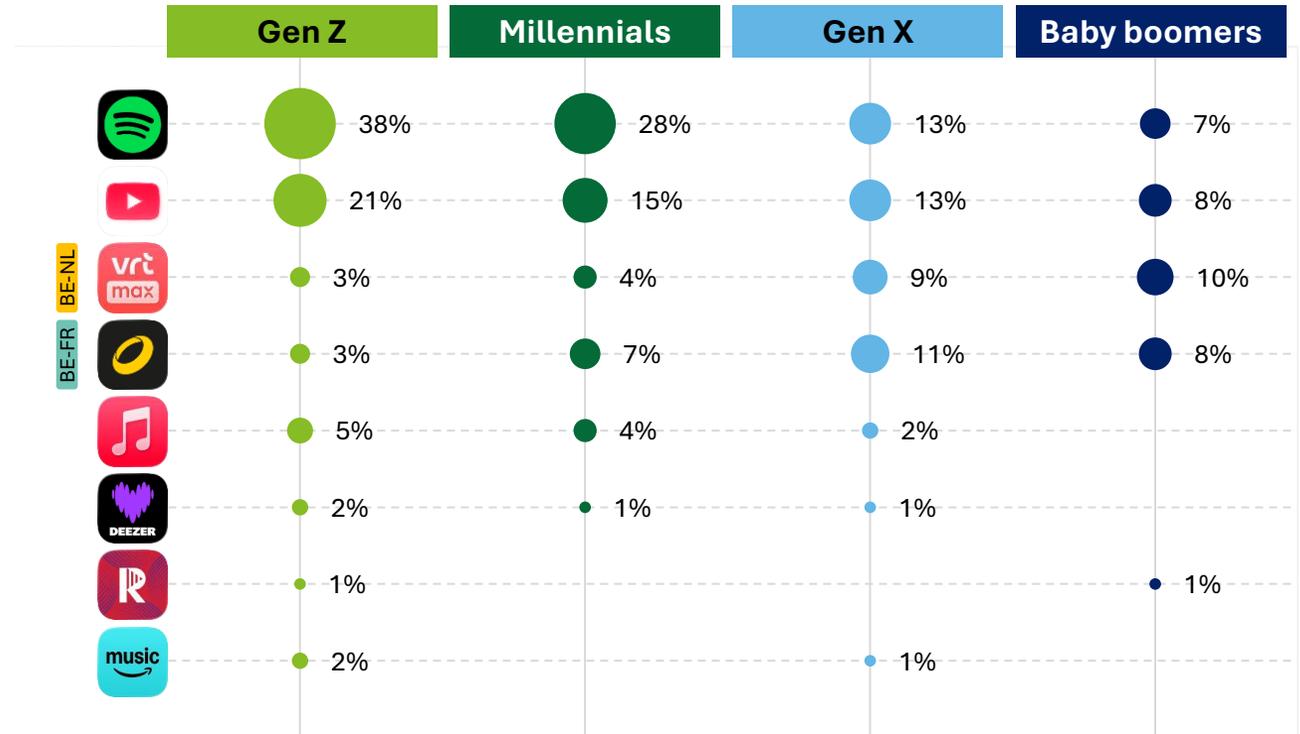
Spotify leads the podcast market, but nearly 40% of the population are non-listeners of this medium; The rise of ‘vodcasts’ could accelerate user adoption

Preferred podcasts platforms (by service and geography, i.e., Belgium, Flanders or Francophone Belgium depending on the service)

The podcast market is led by Spotify and YouTube, but a significant part of the population has yet to adopt the medium. Spotify is the clear leader, with 23% of respondents using it to listen to podcasts. YouTube follows as the second most popular choice at 15%.

Both players have adapted their services to support video podcasts (vodcasts), which are growing in popularity and enabling better monetisation.

The largest single group in the survey is the 39% of respondents who state they do not listen to podcasts, indicating that the medium still has substantial room for growth.



Do not listen to podcasts



Question: Which one, if any, of the following services do you prefer to use when listening to podcasts?
 Weighted base: All respondents aged 18-75, 2025, Gen Z (330), millennials (465), Gen X (327), baby boomers (282)
 Source: Deloitte Digital Consumers Trends, BE, 2025

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Edit Home Screen

Video

Popular

My News

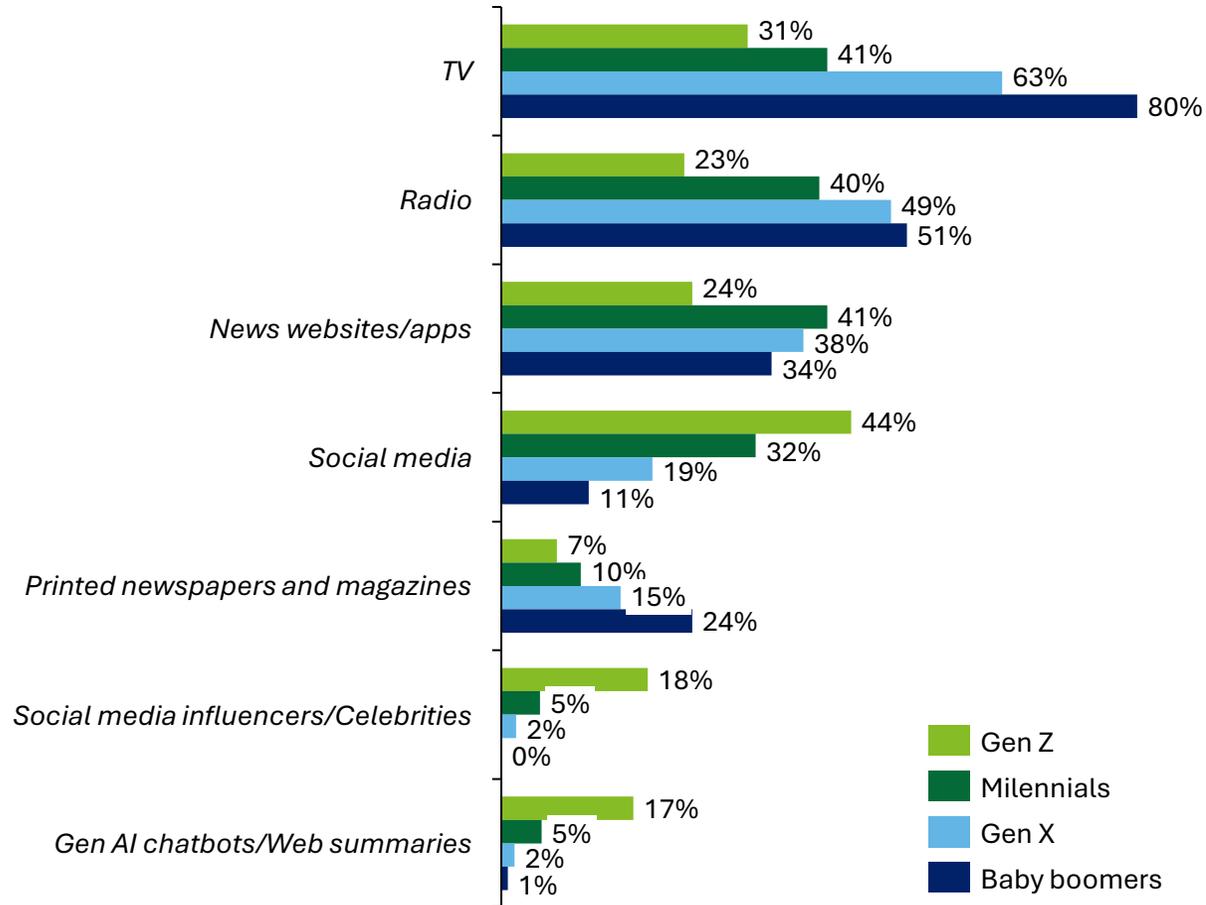
Top Stories

News

Digital Consumer Trends 2025

Social media is Gen Z's preferred news source; 17% also rely on Gen AI chatbots or web summaries for updates

Preferred news source by generation



TV and radio remain the most widely used news sources across all generations, though differences are stark: 80% of baby boomers use TV for news, compared with just 31% of Gen Z.

Local news providers that have shifted to websites and apps are successfully reaching millennials, Gen X and baby boomers, but are struggling with Gen Z. Only 24% of Gen Z use news websites and apps, barely more than radio.

Social media, including content from influencers and celebrities, is heavily used by Gen Z as a news source. AI chatbots and web summaries, which did not exist five years ago, are already used by Gen Z at roughly twice the rate of printed newspapers and are almost as important to them as news websites and apps.

Regional differences are also evident in preferences for news sites and apps. Consumers in the North are significantly more likely to rely on news websites or apps to stay informed compared to those in the South and Centre.

Question: Which channels, if any, do you prefer to use to stay updated on news or current affairs?

Weighted base: All respondents aged 18-75, 2025. Gen Z (337), millennials (554), Gen X (465), baby boomers (511), North (1,071), South (582), Centre (205)

Source: Deloitte Digital Consumers Trends, BE, 2025

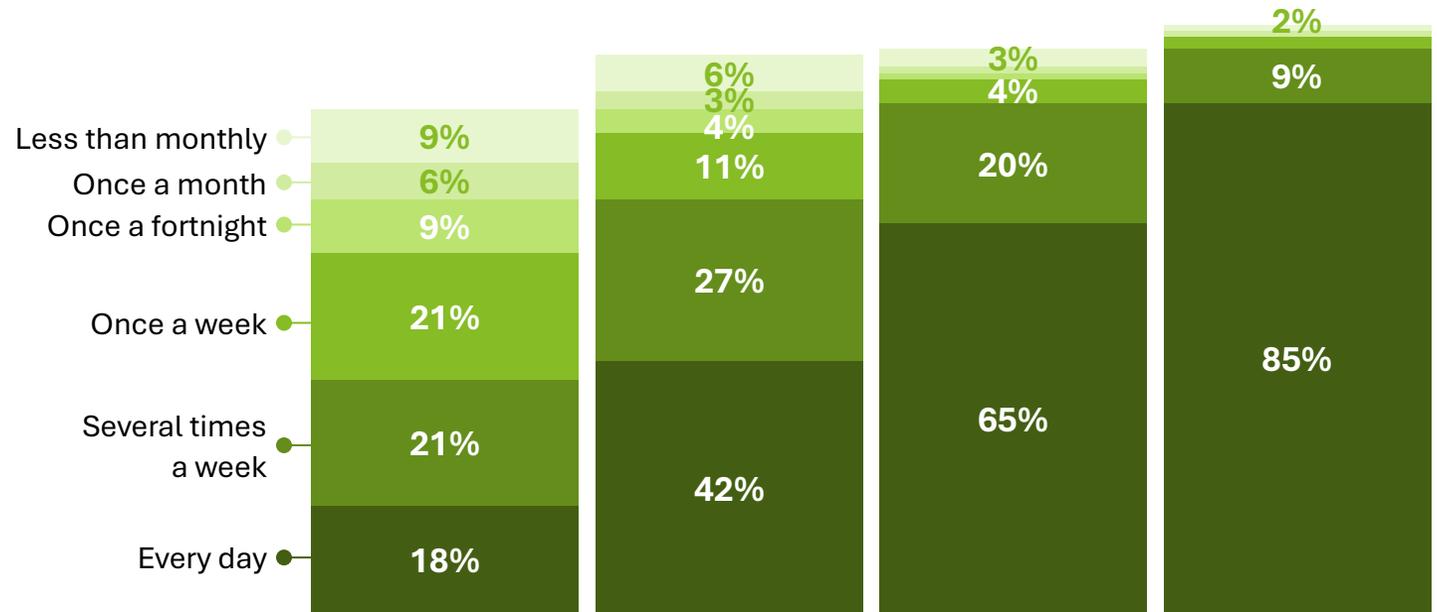
Gen Z shows less interest in regularly keeping up with the latest news, with 61% updating themselves once a week or less

News consumption frequency

Younger audiences update themselves on the news far less frequently than older generations, and they are increasingly avoiding the news, with 16% of Gen Z not updating themselves at all, due to the negative impact of news on mood, information overload, and complexity.

Furthermore, there is an ongoing shift in how and where news is consumed. Younger people tend to become passive news consumers, receiving updates on social media posts, where news is blended with entertainment and shared by creators, instead of proactively looking for news on websites and apps.

Share of users who update themselves on the news



Do not update themselves on the news



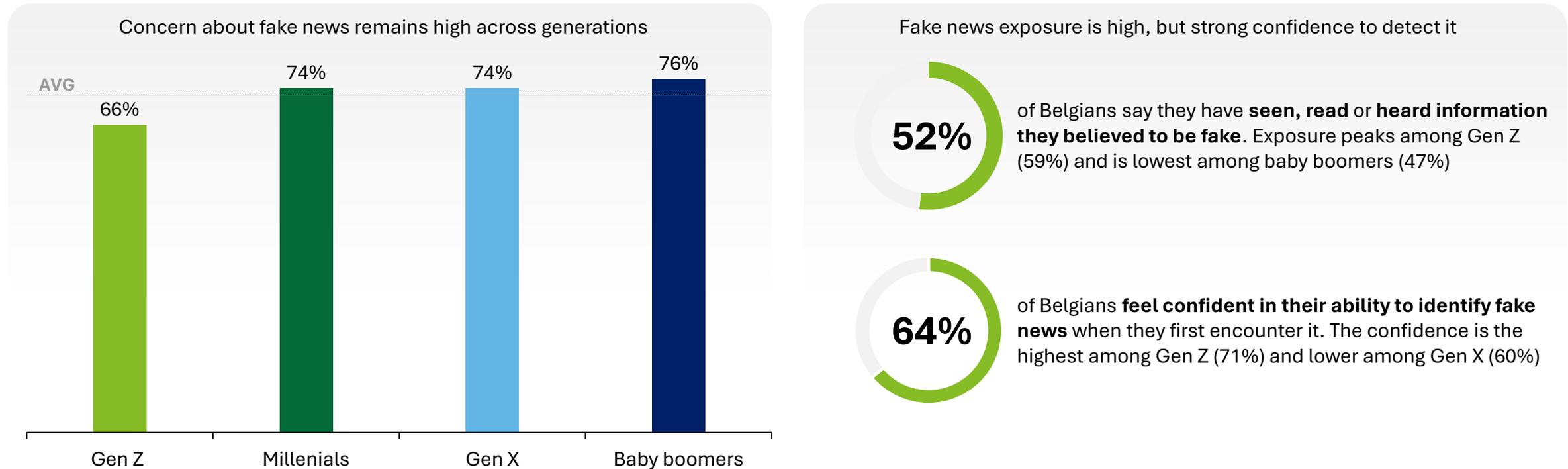
Question: How often, if at all, do you typically watch, read or listen to news or current affairs?

Weighted base: All respondents aged 18-75, 2025, Gen Z (397), millennials (597), Gen X (495), baby boomers (511)

Source: Deloitte Digital Consumers Trends, BE, 2025

Fake news raises important concerns, yet most users feel confident in their ability to identify it

Fake news concerns and exposure



Concern about misinformation is widespread, particularly among older generations, while younger users report higher exposure and greater confidence in identifying fake news. This reflects generational differences in media environments: younger cohorts navigate more digital and social platforms, increasing both exposure and perceived media literacy.

Question: How concerned, if at all, are you about each of the following?

Weighted base: All respondents aged 18-75, 2025, Gen Z (397), millennials (597), Gen X (495), baby boomers (511)

Source: Deloitte Digital Consumers Trends, BE, 2025

Question: (i) To the best of your knowledge, have you personally seen, read or heard any news or information presented as true that you believed to be fake or misleading, in the last month? (ii) On balance, how confident, if at all, are you in being able to identify fake news, when you first see it?

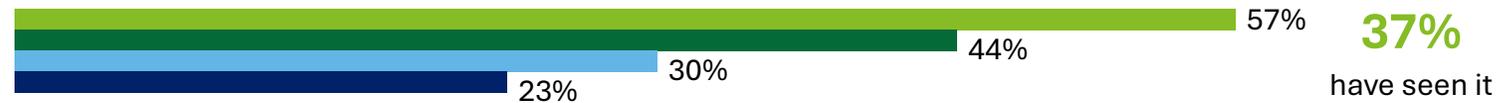
Weighted base: All respondents aged 18-75, 2025, (i), (2,000), (ii), (1,033)

Source: Deloitte Digital Consumers Trends, BE, 2025

Generative AI is gradually becoming part of everyday news consumption habits, led by younger generations

Exposure and usage of AI-generated news content by generation

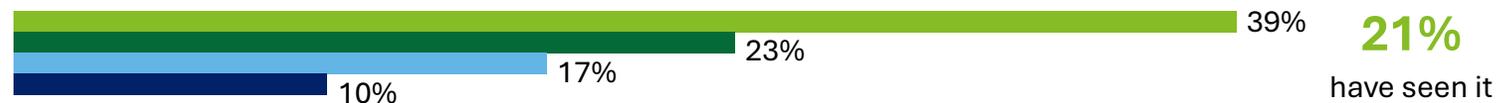
Have ever seen an AI-generated news web summary?



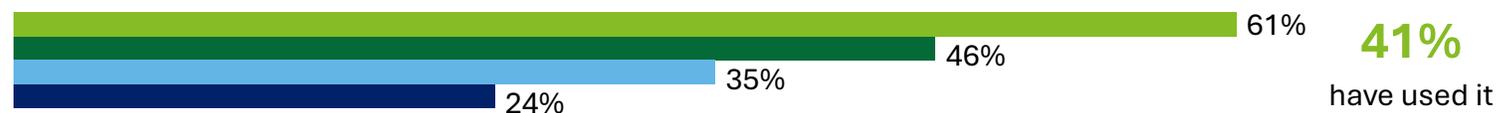
Have ever seen AI-generated news on social media (e.g., pictures, video, etc.)?



Have ever seen AI-generated news articles?



Have ever used an AI assistant to look up information or to summarise news articles?



■ Gen Z ■ Millennials ■ Gen X ■ Baby boomers

AI tools are no longer marginal in the news journey: a substantial share of Belgians have already encountered AI-generated news content, and usage is particularly strong among younger cohorts.

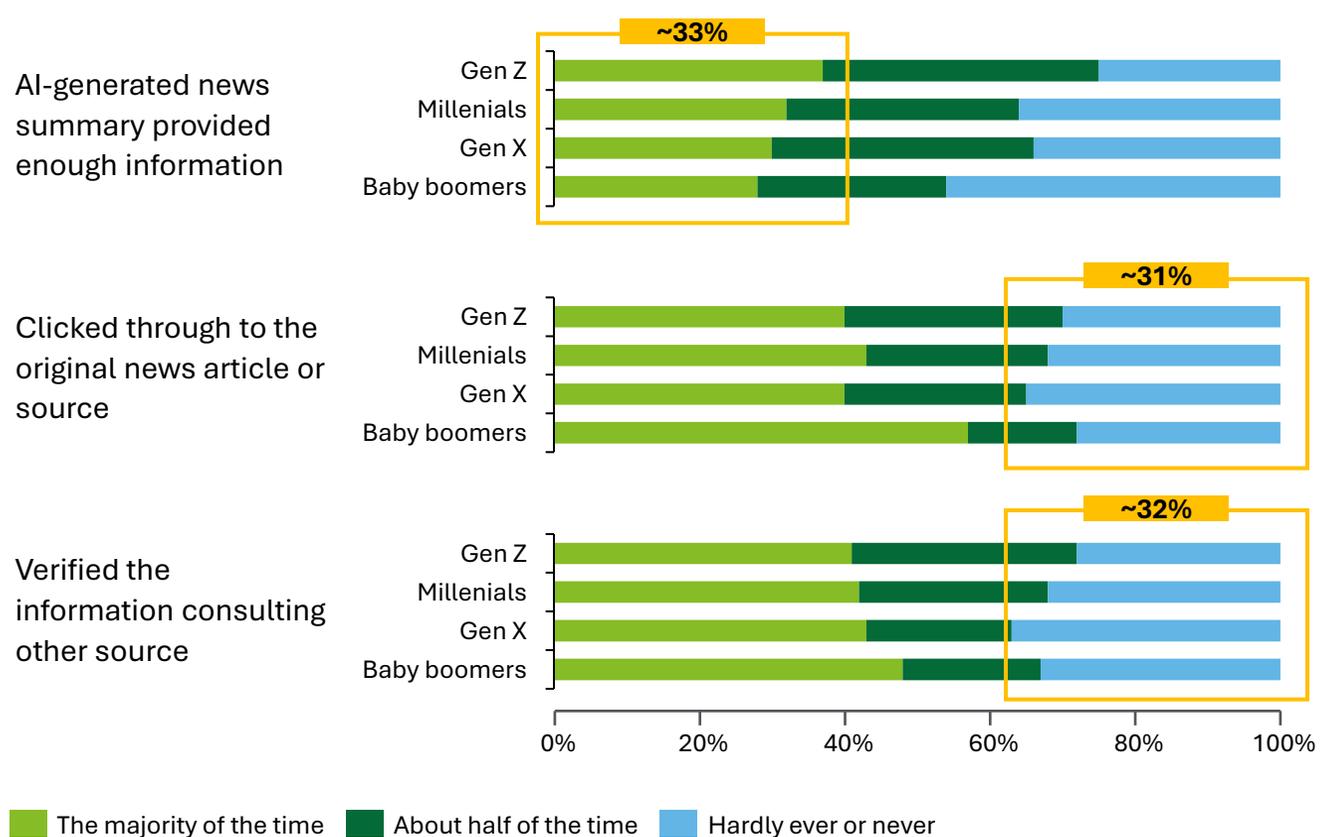
Gen Z not only reports the highest exposure across formats, but also the highest active use, signalling a shift from passive AI-summarised news to active search for news on AI chatbots.

This suggests that AI is progressively integrating into everyday news discovery and summarisation, potentially reshaping how information is accessed, filtered, and trusted.

Question: In the last 12 months, have you seen or used any of the following AI features when online?
 Weighted base: All respondents aged 18-75, 2025, Gen Z (397), millennials (597), Gen X (495), baby boomers (511)
 Source: Deloitte Digital Consumers Trends, BE, 2025

Among consumers of AI-generated news, ~1/3 is satisfied with the AI summary and therefore neither clicks through to the original article nor checks the primary news source

Behaviours regarding AI-generated news



Gen Z is more likely to find AI-generated summaries sufficient, resulting in fewer clicks to original articles and less fact-checking.

By contrast, older cohorts engage less with AI-generated news and display higher verification intensity, pointing to a more cautious but also more proactive relationship with emerging AI-driven news formats.

This trend creates significant risk for publishers, with falling website and app traffic threatening their economics in terms of willingness to pay and ad revenue. This threat compounds existing industry challenges around search and social visibility, where publishers are highly exposed to algorithm changes.

Question: When reading AI-generated news content or summaries, on balance, how often, if at all, did each of the following apply?

Weighted base: All respondents aged 18-75, 2025, (1,144)

Source: Deloitte Digital Consumers Trends, BE, 2025

A photograph of two women sitting at a grey table, reviewing documents. Both women are wearing white blouses with black polka dots. The woman on the left is holding a pen and writing in a spiral notebook. The woman on the right is pointing at a document. There are several stacks of papers on the table. The background is a plain, light-colored wall.

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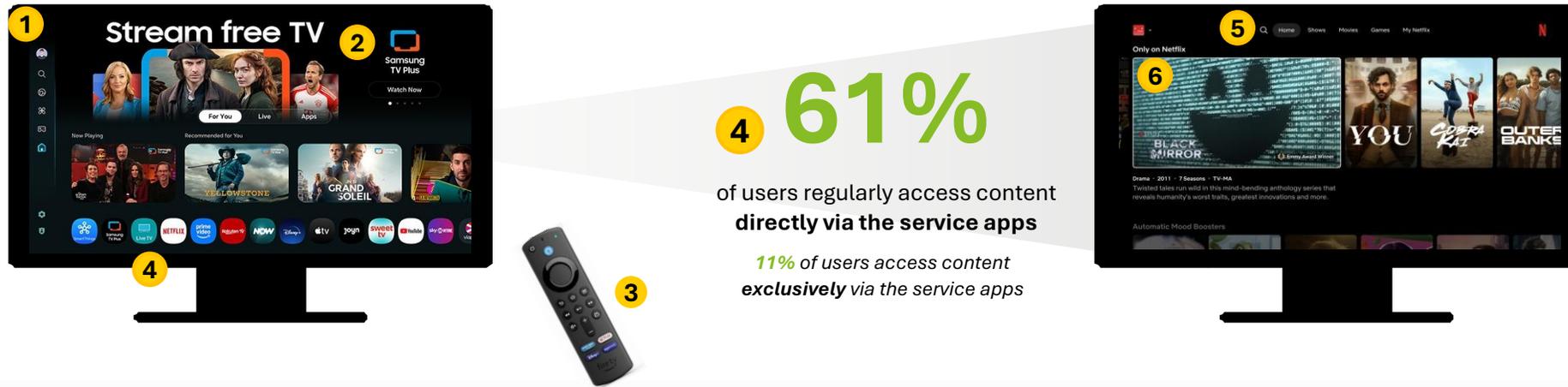
Appendix

Digital Consumer Trends 2025

Content discovery on smart TVs is driven by active search rather than passive recommendations

Ways users discover content on smart TVs ...

... and in the services (i.e., Netflix, HBO)



- 1 53%** of smart TV users regularly **search for content** using the **smart TV search bar**
- 2 40%** of smart TV users regularly **click on recommendations** shown on the **smart TV home screen**
- 3 26%** of smart TV users regularly **use the voice button** on the remote control to search for content

- 5 56%** of smart TV users regularly **search for content** using the **search bar** in the service/app
- 6 41%** of smart TV users regularly **click on recommendations** shown in the service/app

Question: When watching content on your TV, how often, if at all, do you do each of the following?

Weighted base: All respondents aged 18-75, 2025, (1,336)

Source: Deloitte Digital Consumers Trends, BE, 2025

Willingness to pay for extra content types, access and experiences declines with age, with younger users more open to paying for personalisation and content depth

Customer willingness to pay more for the following content type, access or experience (€/month)

	Gen Z		Millennials		Gen X		Baby boomers	
	≤ €5	> €5	≤ €5	> €5	≤ €5	> €5	≤ €5	> €5
Ad-free viewing experience	18%	12%	19%	10%	13%	12%	14%	6%
More content to watch	17%	12%	19%	10%	12%	10%	6%	3%
More content tailored to my preferences	18%	11%	14%	8%	13%	10%	14%	6%
Exclusive premiere access to new releases	13%	12%	12%	6%	6%	6%	2%	1%
Greater diversity in content themes	11%	8%	9%	7%	7%	7%	3%	3%
Content with better image and sound quality	8%	10%	8%	5%	8%	5%	3%	4%
Easier access and discoverability of content	11%	6%	8%	4%	6%	3%	3%	2%
Better personalised recommendations based on viewing history	8%	8%	7%	4%	7%	4%	3%	2%
More content from my area/region/country	7%	8%	6%	3%	4%	3%	1%	1%

Gen Z is more open to paying above entry-level price points, whereas older cohorts remain markedly more price-sensitive and selective.

The overall willingness to pay for extra video features or content is limited: across generations, most users who are willing to pay more would only spend an additional €5 per month for most features.

An ad-free experience ranks highest, with 19% of millennials willing to pay €5 extra per month or less for this feature, while 12% of Gen Z would pay more than €5 per month. Beyond this ad-free experience, consumers place the highest monetary value on the core offering: the content itself.

Regionally, Flanders and Francophone Belgium display broadly similar willingness-to-pay patterns. Flanders skews slightly more toward lower incremental spend levels (below €5).

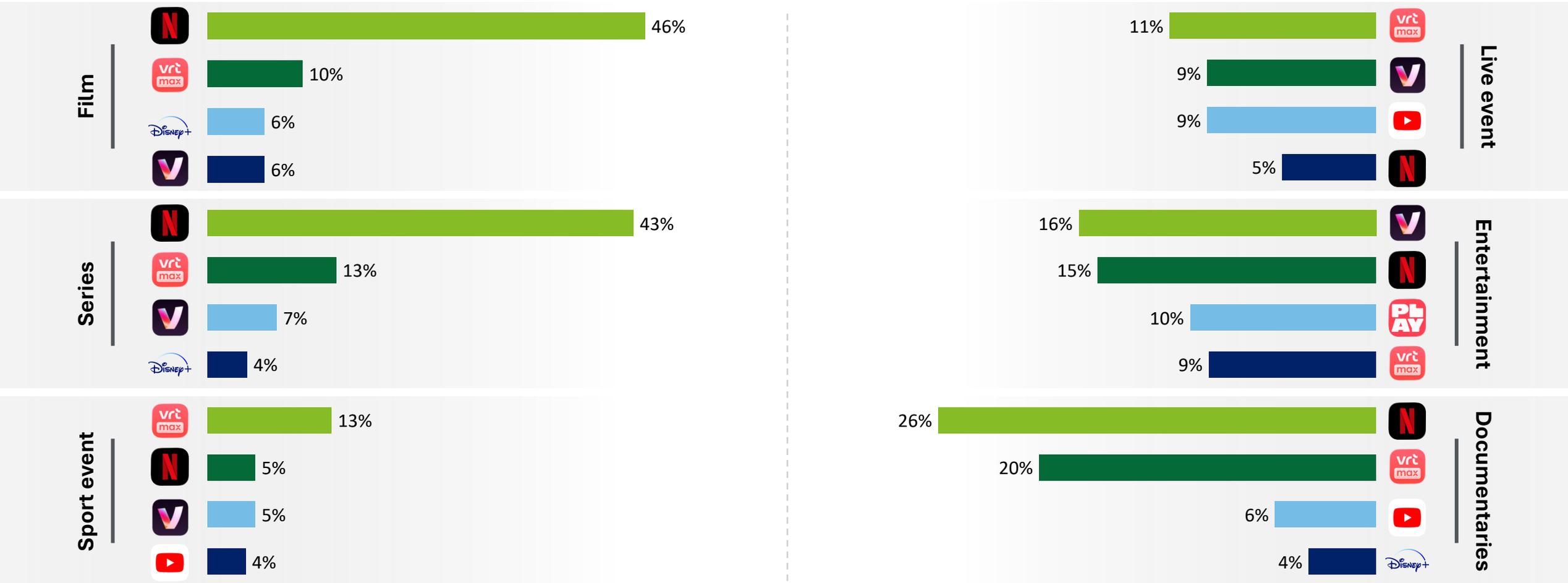
Question: In addition to your current monthly spend on video subscription services, how much more would you pay to receive the following types of content, access to content or experiences?

Weighted base: All respondents aged 18-75, 2025, Gen Z (83), millennials (113), Gen X (54), baby boomers (13)

Source: Deloitte Digital Consumers Trends, BE, 2025

In Belgium, Netflix dominates films, series and documentaries, while local broadcasters are preferred for live and locally relevant content (1/2)

Top 4 video streaming services by content type, based on user preferences in Flanders



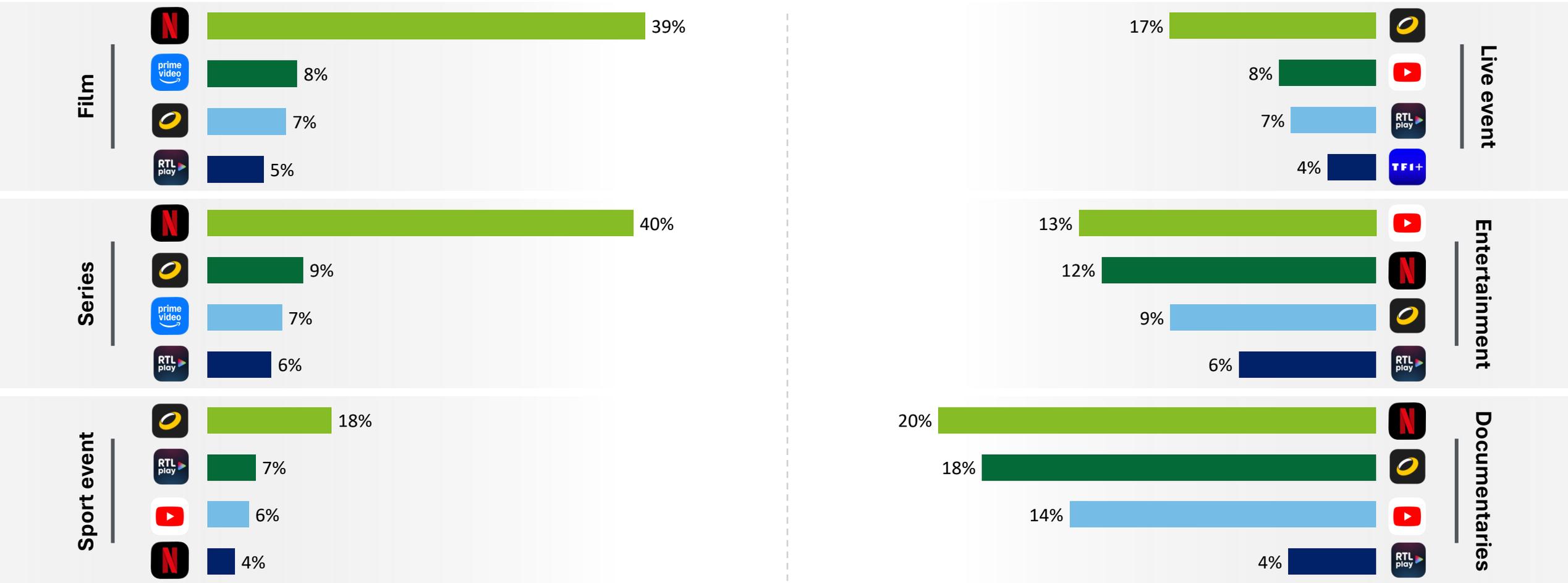
Question: Which, if any, of the following paid or free video streaming services do you prefer to use when watching?

Weighted base: All respondents aged 18-75, 2025, North (852), South (461), Centre (165)

Source: Deloitte Digital Consumers Trends, BE, 2025

In Belgium, Netflix dominates films, series and documentaries, while local broadcasters are preferred for live and locally relevant content (2/2)

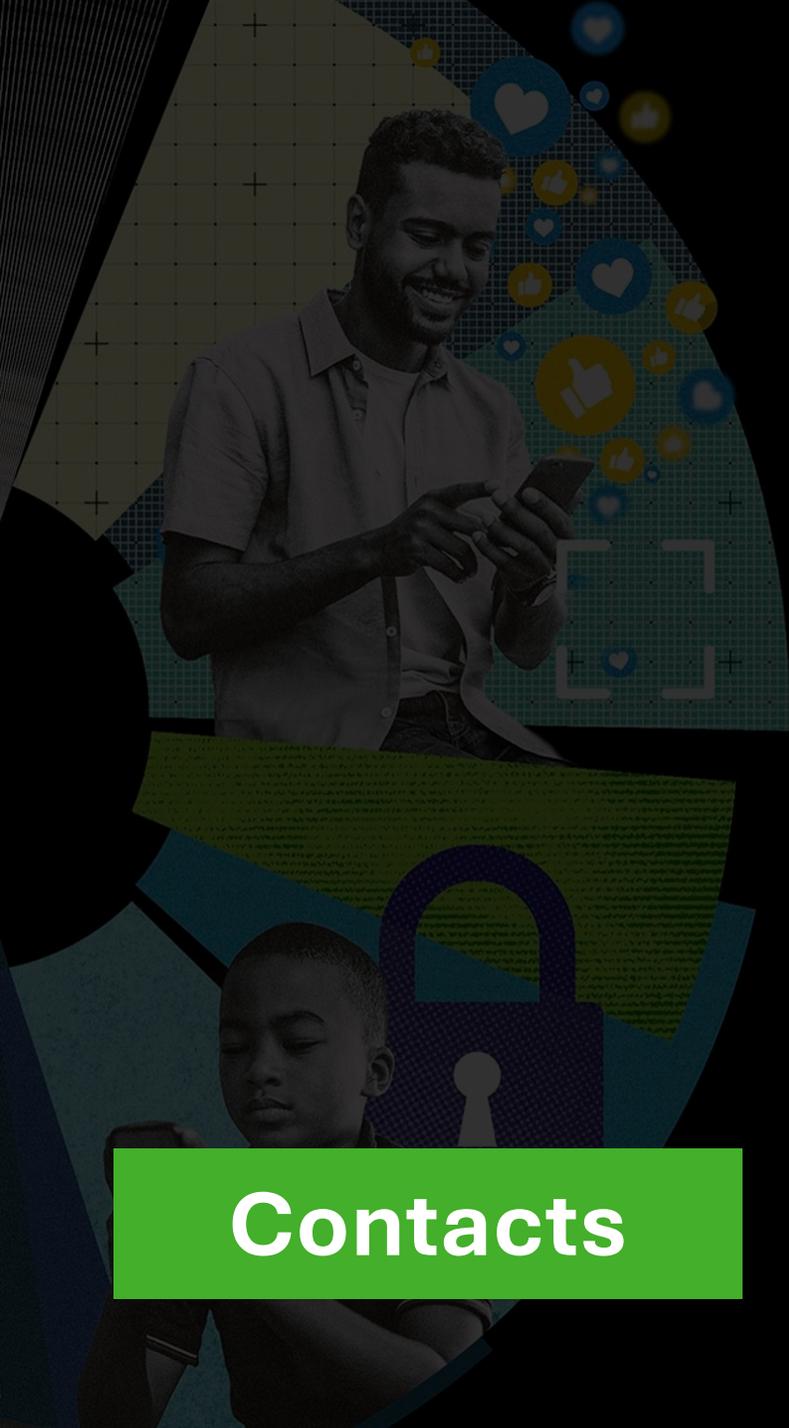
Top 4 video streaming services by content type, based on user preferences in Francophone Belgium



Question: Which, if any, of the following paid or free video streaming services do you prefer to use when watching?

Weighted base: All respondents aged 18-75, 2025, North (852), South (461), Centre (165)

Source: Deloitte Digital Consumers Trends, BE, 2025



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