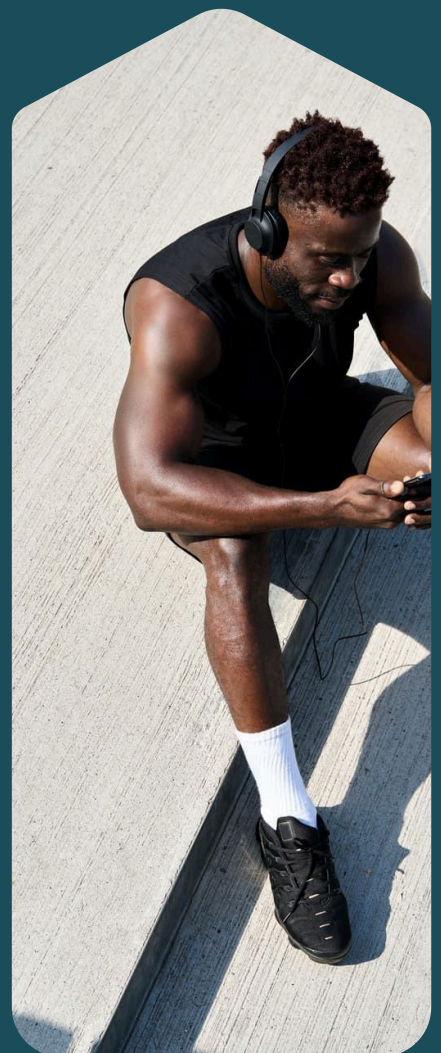
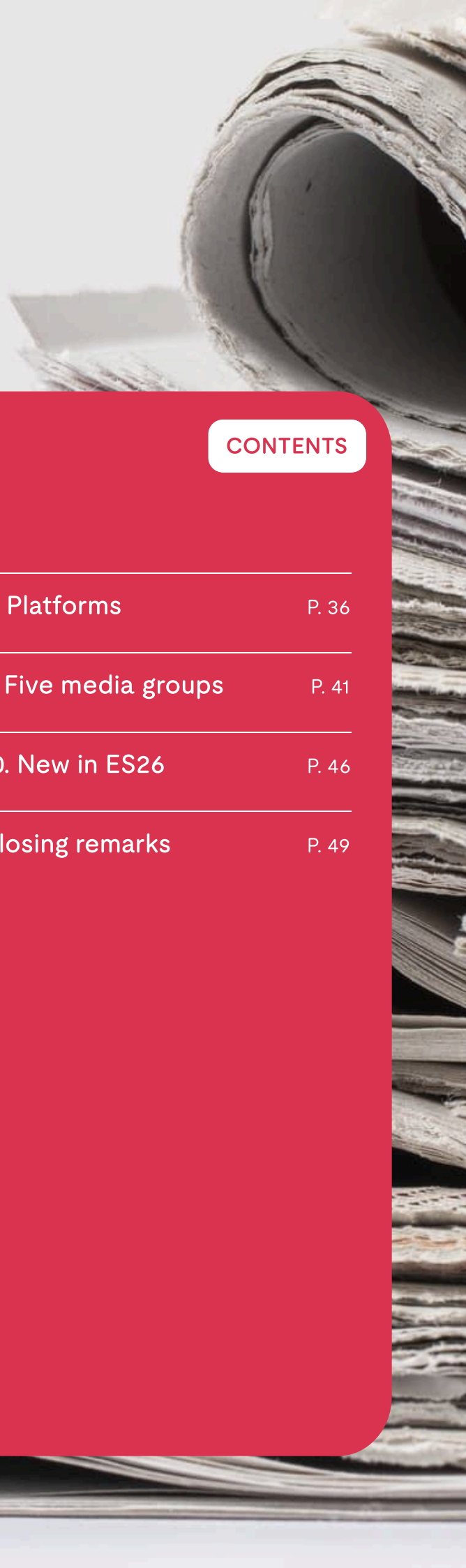


ESTABLISHMENT SURVEY

2026





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Introduction

The Establishment Survey (ES) is CIM's annual study of media use and device ownership in Belgium. It follows the evolution of the media landscape and supplies the base data for the CIM Golden Standard, the benchmark for all other CIM studies.

Sample design and method

This edition is based on survey data from 7 283 respondents aged 12 and over. Fieldwork ran from 1 May 2025 to 31 March 2026, using multimodal, representative data collection through three recruitment sources:

- Face-to-face interviews via GfK Belgium: 4 370
- CIM MediaWatch panel: 2 087
- Online access panel via GfK Belgium: 826

Reading this report

All results are weighted. Figures in brackets give the difference with ES25 in percentage points, for example 88,3% (+2,0). Questions asked for the first time this year are brought together in chapter 10.



Management summary

In 2026, Belgians are not so much acquiring new devices as using the ones they have in more ways. Access to devices and the internet is close to universal, and the differences between groups in access are getting smaller. The differences that remain lie increasingly in use.

Devices: stable equipment, changing shape.

The television remains the most widespread device in Belgian homes (94,2%), just ahead of the smartphone (93,5%), and household equipment looks much as it did last year. The change lies in the type of device. The radio set is still present in more than half of homes (58,4%, -4,7), but it is lower than last year, as are the other devices that do one thing: the landline (30,1%, -5,0), the feature phone (11,5%, -3,3) and the DVD player (29,9%, -2,7). The television screen takes on more functions, with smart TV ownership at 67,3% (+4,1).

Equal access, different use.

Since ES24, the gaps between age groups have narrowed for household devices and internet use. The age gap in smartphone ownership fell from 31 to 21 points, and in internet use from 27 to 21 points. For the newest behaviours the gaps grew: in one year, the age gap in AI use widened from 33 to 49 points and the education gap from 27 to 37 points.

Internet: near-universal reach, wider use.

88,3% of Belgians are online every day (+2,0) and 5,6% (-1,1) do not use the internet. Measured for the first time, 28,7% were online four hours or more on their last day of use, rising to half of 15- to 24-year-olds (49%). People use the internet for a wider range of activities, with search (77,3%, +4,6) and internet telephony (66,0%, +5,1) among the clearest increases. The smartphone remains the main device to go online (82,5%, +1,5).

Artificial intelligence: the largest movement in the study.

AI use rose to 40,4% (+15,0). It increased in every group, but most where it was already highest: 61,0% (+18,6) among Belgians with a master's degree against 24,3% (+9,1) among those with primary education or none, and 67,2% among 21- to 24-year-olds against 12,1% of the over-65s.

Privacy: action follows the opportunity.

95% of internet users say protecting their privacy online matters. The measures that rose most are those offered in a consent dialog: refusing cookies (57,9%, +8,3) and refusing to share personal data (50,5%, +7,6). The share taking no measure at all fell to 17,4% (-7,3), but is higher among 12- to 17-year-olds (22,7%).

Video: live television remains the reference.

Live television reaches more than two in three Belgians (69,3%, -3,9), and nearly half (45,8%, -2,8) watch it daily. The broadcasters' own sites and apps reach 53,3% of Belgians (+1,2). Counting everyone who watches live television, a broadcaster site or app, or both, the reach is 84,7% of Belgians.

Belgians were asked in which ways they watch television programmes, and could give several answers: live, recorded, afterwards via a site, app or replay service, before broadcast, and films, series and fragments on a TV channel's own site or app. 84,3% of Belgians watch television programmes in at least one of these ways.

Audio: FM radio remains the largest channel.

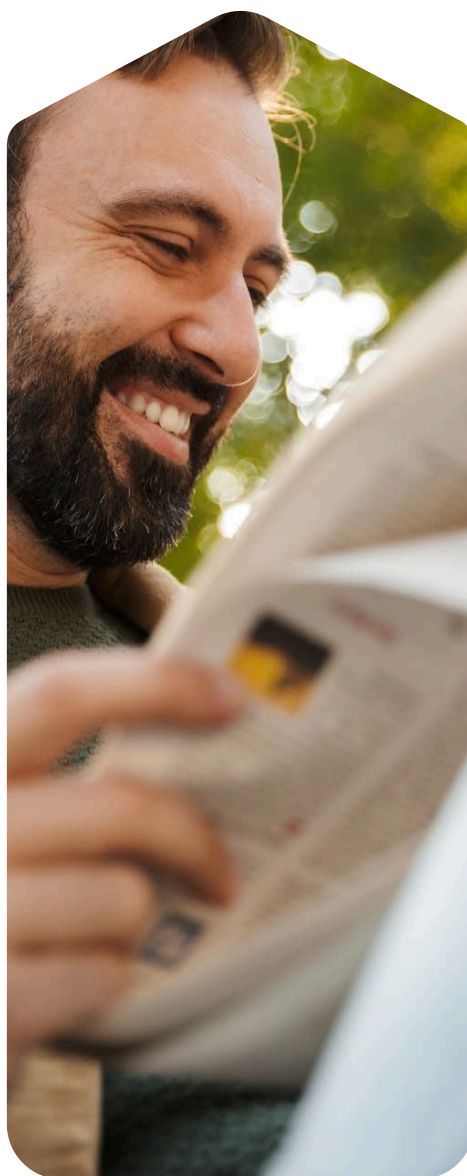
Live radio via FM is the most widely used type of audio, reaching more than four in ten Belgians (44,2%, -5,1), and six in ten listen via a car radio (60,8%). Online radio and podcasts reach 22,9% of Belgians: live radio via a station's site or app or an online radio platform, together with audio podcasts and time-shifted radio. Audio streaming services reach 36,7% (+3,4), mainly among the under-35s, and podcasts 12,0% (+1,6).

Platforms: a stable top tier.

The four most-used platforms measured in both years are each within 1,3 points of last year. WhatsApp, added to the list this year, reaches the most people of all (75,6%). Below the top, each platform has its own audience, shaped mainly by age and gender.

New this year.

The smartwatch enters at scale: 31,3% of Belgians have one in the household and 21,9% use one personally. In the car, one Belgian in four (25,0%) uses Apple CarPlay or Android Auto.





DEVICES

01

A saturated market that keeps changing shape

Belgian homes are not filling up with more equipment. They keep what is versatile and ask more of the screens they already have.

1. The single-purpose device recedes

All devices at a glance

Two questions describe the devices in Belgian homes: which devices the household has, and which ones people use personally. Starting with the household, the television remains the most widespread device:

94,2% of Belgians have one at home (-0,6), just ahead of the smartphone (93,5%, +1,5). The laptop (78,7%), the operator set-top box (77,6%) and the car radio (72,8%) follow, each present for more than seven in ten. The smartwatch, measured for the first time, is found in the household of 31,3% of Belgians.

Devices in the household, ES25 and ES26.

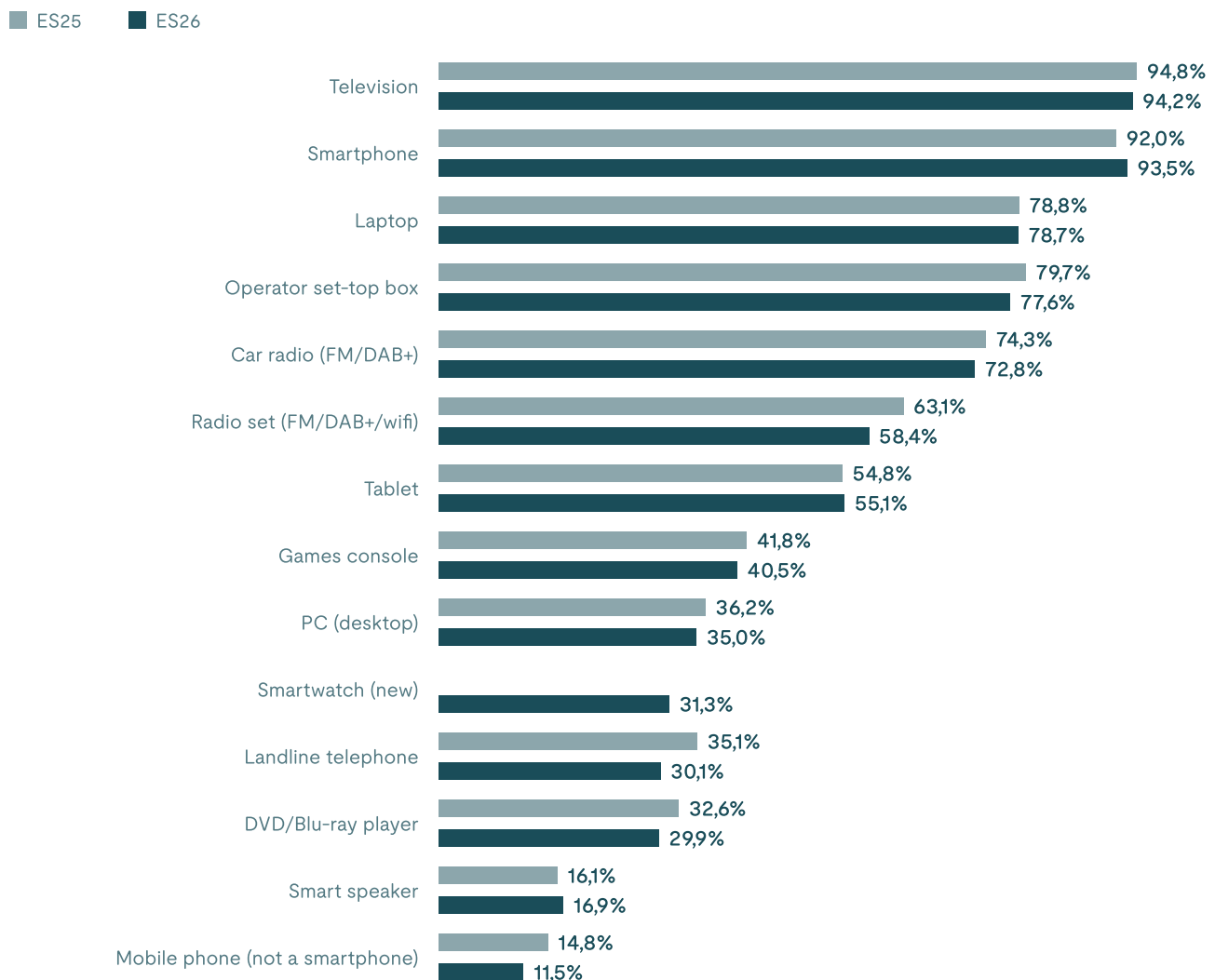
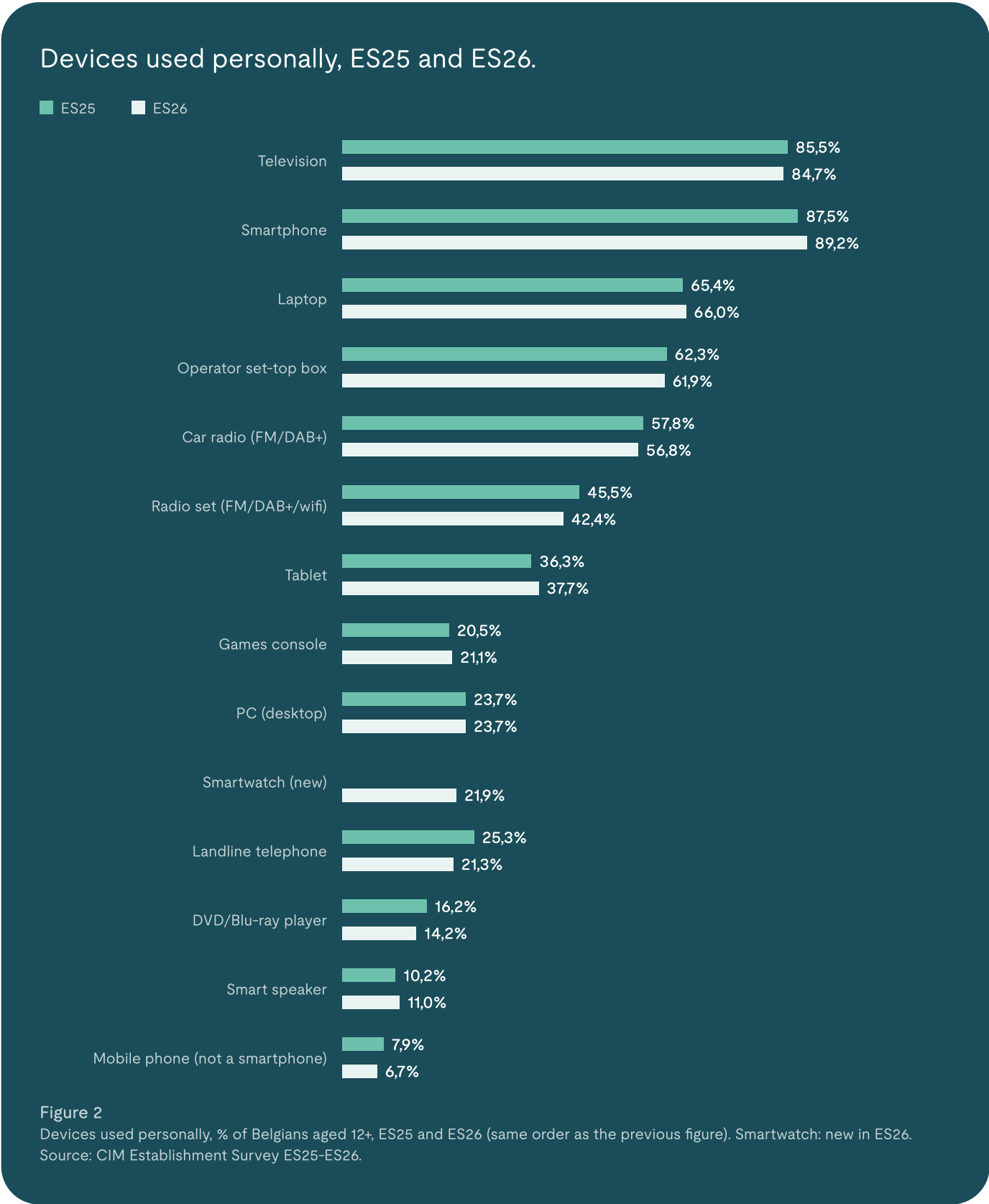


Figure 1
Devices in the household, % of Belgians aged 12+, ES25 and ES26. Smartwatch: new in ES26. Source: CIM Establishment Survey ES25-ES26.

When we then look at personal use, a separate question, the television is used by 84,7% of Belgians themselves (-0,8) and the smartphone by 89,2% (+1,7).

Personal use moves less than possession: only the radio set (42,4%, -3,1) and the landline (21,3%, -4,0) changed significantly.



What the household holds: single-purpose devices recede

The first impression is continuity: household equipment looks much as it did last year. Laptops are at 78,7% (-0,1), tablets at 55,1% (+0,2), and the share of households with exactly one television set has stayed at around 64% for three years (63,9%, +0,1).

Look closer, and every device that does exactly one thing is lower than last year: the landline to 30,1% (-5,0), the standalone radio set to 58,4% (-4,7), the feature phone to 11,5% (-3,3) and the DVD player to 29,9% (-2,7). The multi-purpose devices held their level.

Change in household penetration, ES26 vs ES25.

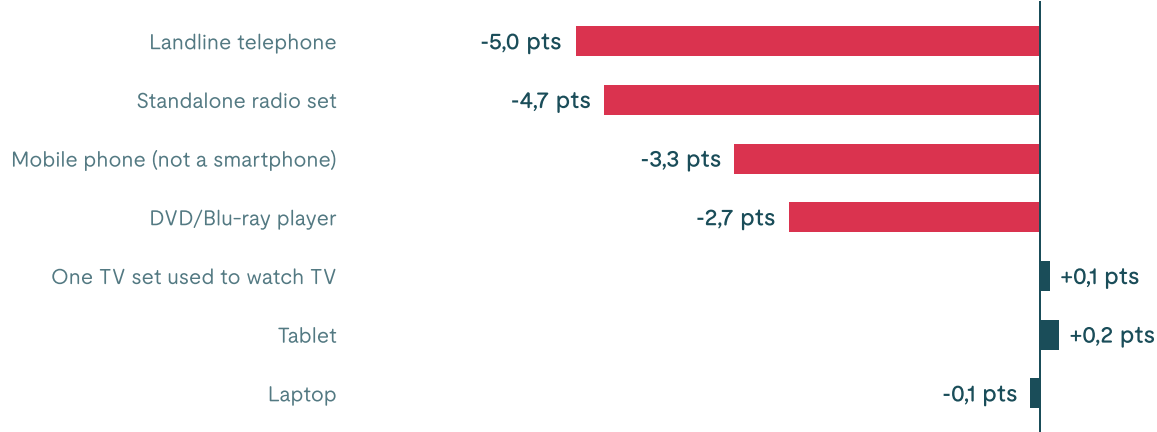
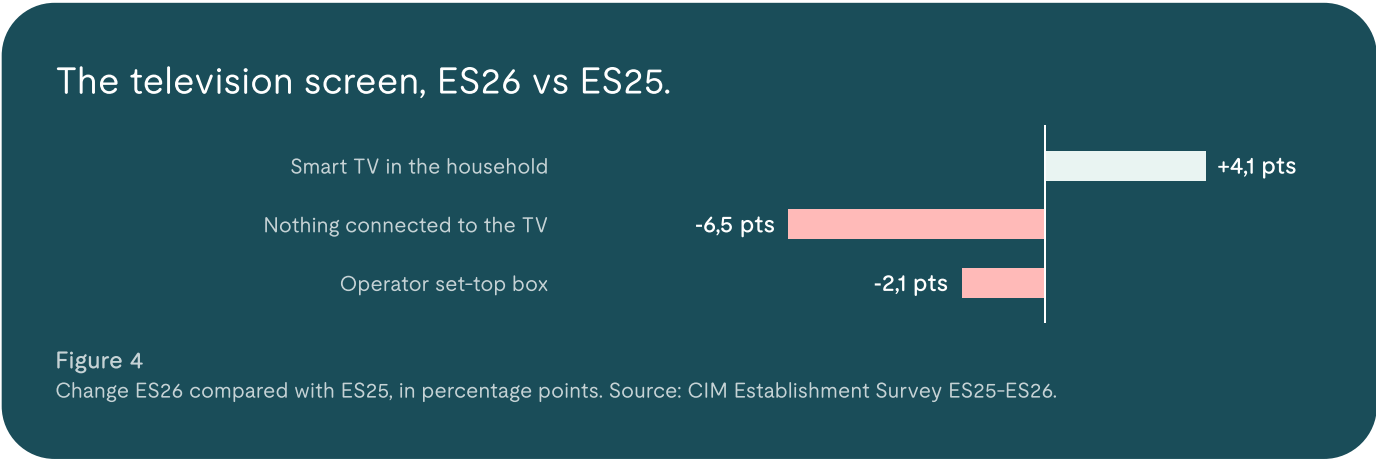


Figure 3
Change in household penetration, ES26 compared with ES25, in percentage points. Red: devices that do one thing. Teal: devices that do many things. Source: CIM Establishment Survey ES25-ES26.

The screen absorbs the boxes around it

The television is the one device gaining functions. Smart TV ownership rose to 67,3% (+4,1), and among the over-65s to 45,1% (+8,5).

The operator set-top box is at 77,6% (-2,1), and the share of households connecting nothing to the television fell to 45,4% (-6,5). The set is not being replaced; it takes over the functions of the equipment around it. Households without a television set remain at about 5% (5,3%, +0,4).



What people use, not what the house holds

The overview at the start of this chapter already showed that having a device at home and using it are two different things. Per person, the difference adds up: a Belgian household holds on average 7,4 of the 15 device types measured, while its members personally use 5,7. The broadest personal repertoires belong to 45- to 64-year-olds (6,0 to 6,2), who combine the television, radio and set-top box with the laptop and smartphone.

After the smartphone (95,5%), the television is the most personally used device in the home: 89,9% of people living with a television watch it themselves. The tablet (68,4% of those with at least one tablet in the household) and games console (52,2%) are shared household objects rather than personal ones.

Device types used personally, by age, ES26.

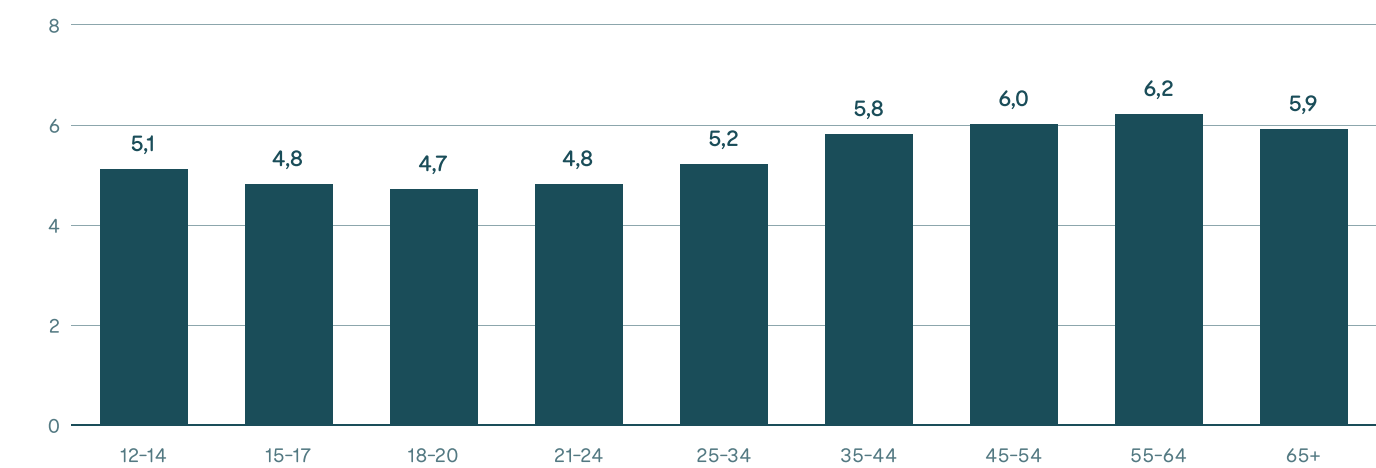
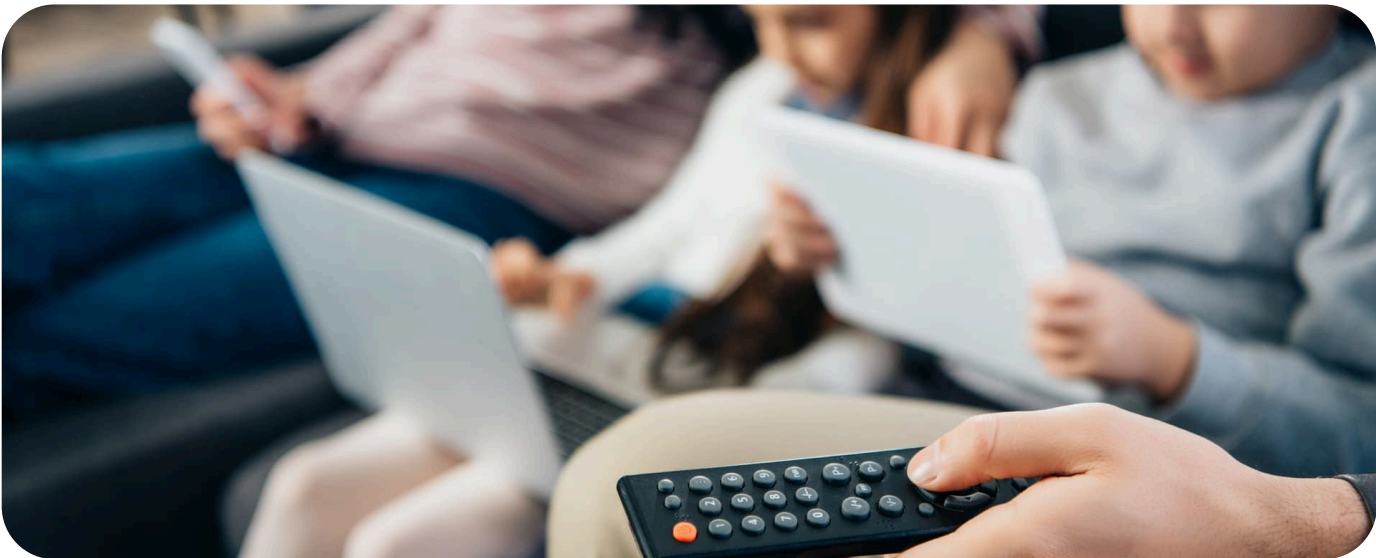


Figure 5
Average number of device types used personally (out of 15), by age, ES26. Weighted averages. Source: CIM Establishment Survey ES26.





EQUAL ACCESS, DIFFERENT USE

02

The pattern behind this year's results

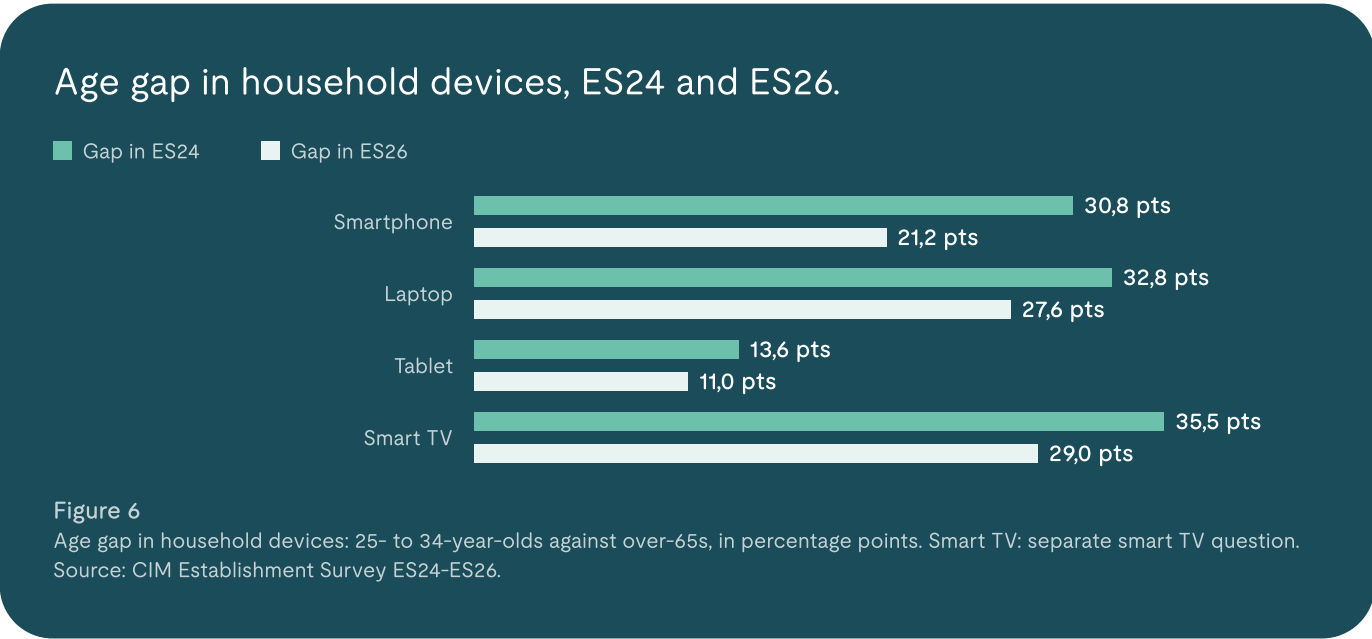
For years, the digital divide was a question of access. In 2026 it is increasingly a question of use.

2. Access gaps close, use gaps open

Chapter 1 showed which devices Belgians have and use. This chapter asks a different question: are the differences between groups of Belgians getting smaller or larger? An average can rise while groups drift apart, so we follow two gaps over time. The age gap is the difference between 25- to 34-year-olds and the over-65s; the education gap is the difference between Belgians with a master’s degree and those with primary education or none. ES25 described a device market that had reached saturation; ES26 follows the thread from what people own to what they do with it.

Access: the age gaps are closing

Start with the devices in the household. In ES24 the share with a smartphone was 31 points higher among 25- to 34-year-olds than among the over-65s; in ES26 the difference is 21 points. The laptop gap (33 to 28 points) and the smart TV gap (36 to 29 points) narrowed as well. When we then look at internet use itself, a separate question, the age gap narrowed in the same way, from 27 to 21 points.



Use: some age gaps are opening

On use, the picture is different. Among the 15 activities people use the internet for, the age gap widened for AI, from 33 to 49 points in a single year, and for watching videos (47 to 53 points). It narrowed for social media (52 to 46 points); for the other activities it did not change significantly.

When we then look at audio and video, the age gap in audio streaming grew from 41 to 50 points and in video on social media from 38 to 44 points over two years.

Age gap in online activities, first measurement and ES26.

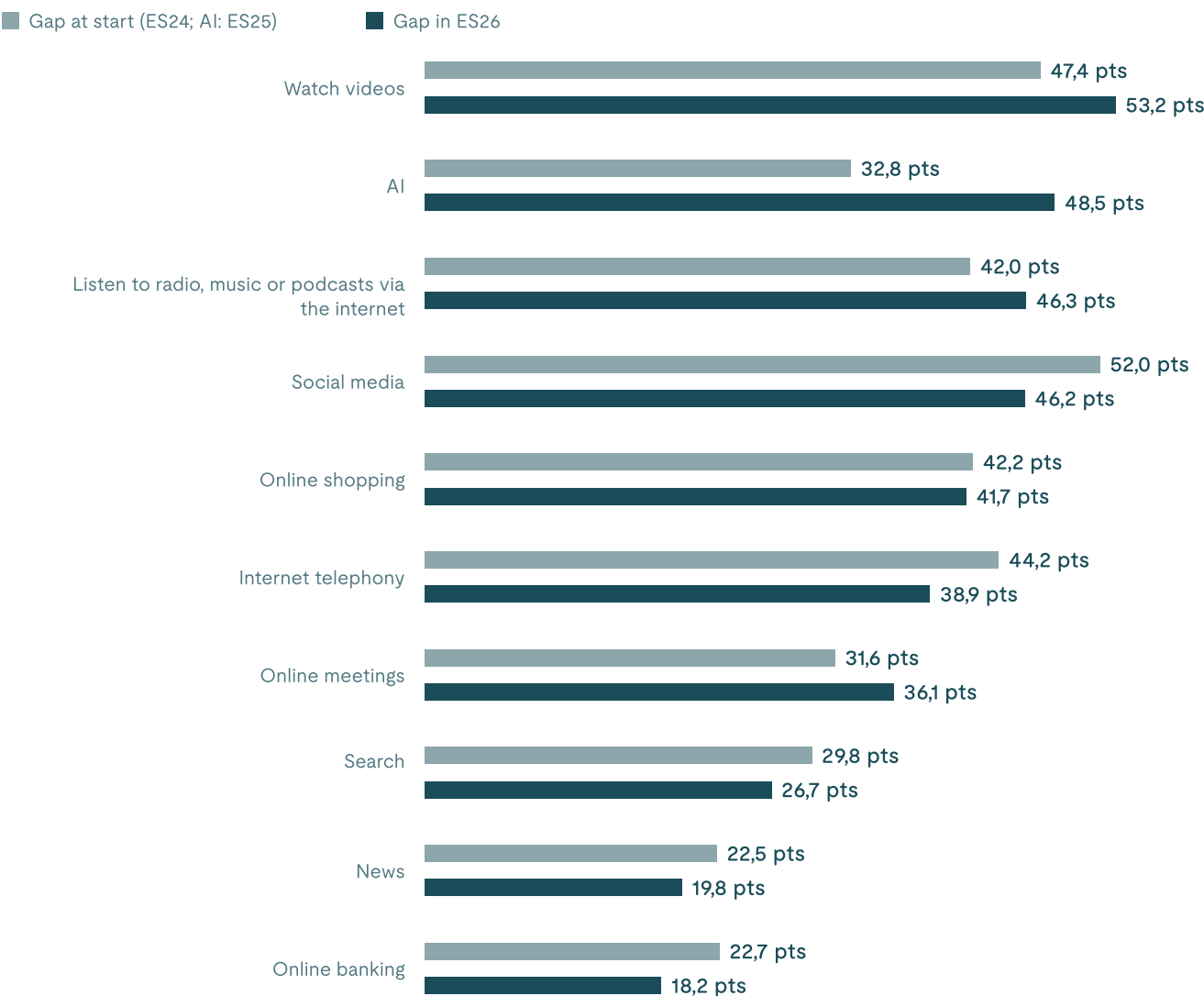


Figure 7
Age gap in online activities: 25- to 34-year-olds against over-65s, in percentage points. Question: “For which activities have you used the internet in the past months?” Selection of 10 of the 15 activities. AI: ES25 (first measured) and ES26; other activities: ES24 and ES26. Source: CIM Establishment Survey ES24-ES26.



INTERNET

03

Reach is settled; use keeps widening

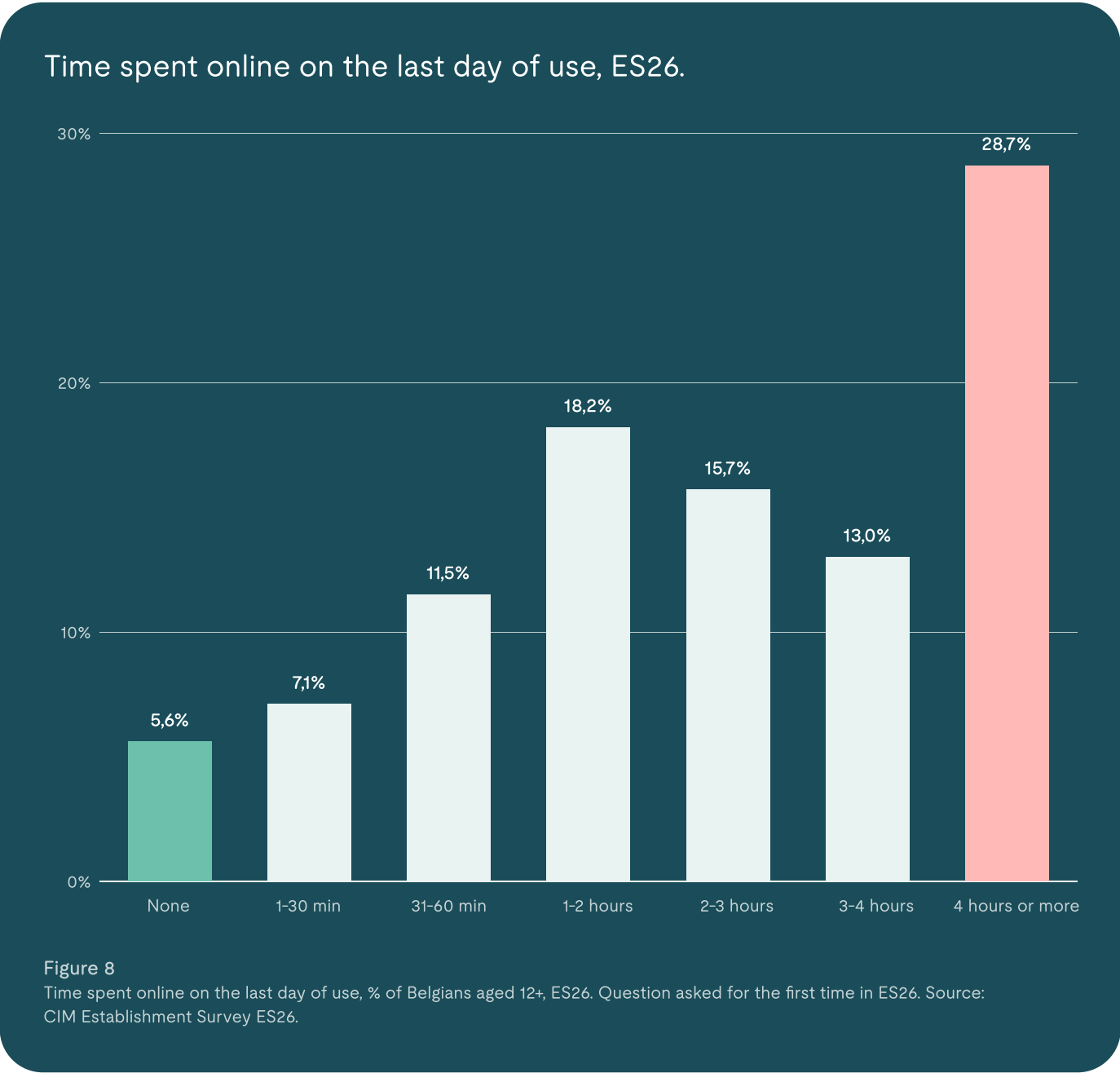
With close to nine in ten Belgians online every day, the question is no longer whether people use the internet, but how long, for what and on which screen.

3. Near-universal reach, wider use

Internet non-users account for 5,6% (-1,1) of the population, against 7,0% two years ago, and daily use rose to 88,3% (+2,0).

Time spent online

A new question this year asks how long people were online on the last day they used sites or apps. More than one Belgian in four (28,7%) was online four hours or more; a further 13,0% spent three to four hours. At the other end, 7,1% spent half an hour or less and 5,6% are not online.



Time online differs most by age. Half of 15- to 24-year-olds (49%) are online four hours or more on a day of use, against 26% of 45- to 54-year-olds and 9% of the over-65s, of whom 21% are not online at all.

12- to 14-year-olds are online less than older teenagers: 23% four hours or more. Men are online four hours or more somewhat more often than women (31,4% against 26,1%); women are also more often not online (7,4% against 3,8%).

Time spent online on the last day of use, by age, ES26.

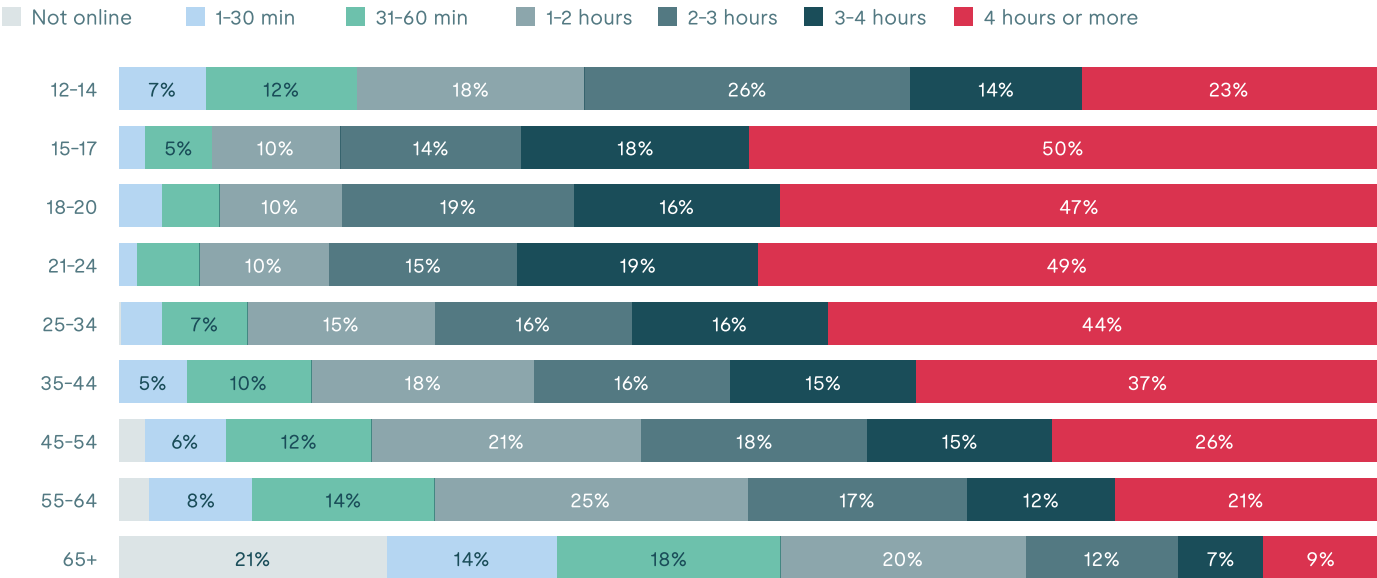


Figure 9
 Time spent online on the last day of use, % of each age group, ES26. Question asked for the first time in ES26: “The last day you used sites or apps, how long was it?”. Source: CIM Establishment Survey ES26.



Time spent on online video and audio

Separate questions measure how long people watch video and listen to audio via each online channel.

They are asked per channel and expressed in minutes per average day, so they cannot be added to the time online above; what they show is where online viewing and listening time goes. For video, live television remains the reference (chapter 6). Among online channels, streaming services take the most time (52 minutes per average day per Belgian), followed by video on social media (37 minutes), YouTube and Twitch (19 minutes) and the TV channels' and operators' own sites and apps (16 minutes).

Online video: minutes per average day by type of channel, ES26.

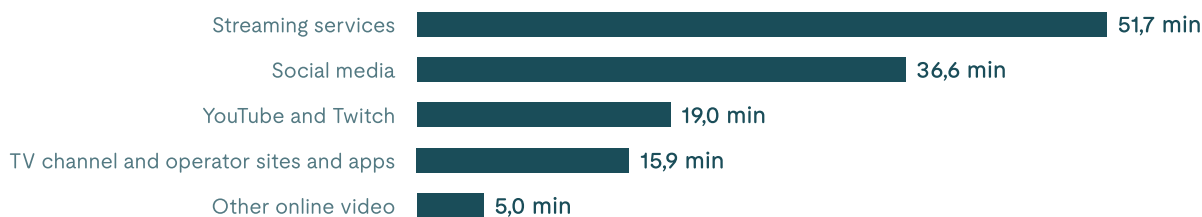
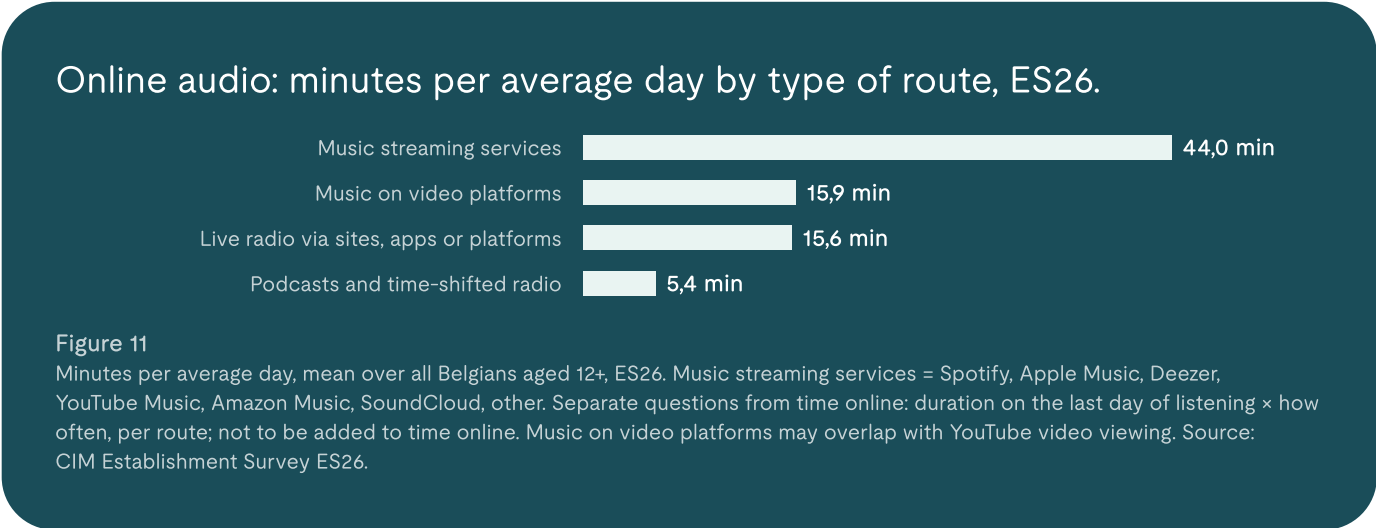


Figure 10
Minutes per average day, mean over all Belgians aged 12+, ES26. Streaming services = Netflix, Disney+, Prime Video, Streamz, HBO Max, Sooner. Social media = Facebook, Instagram, TikTok, Snapchat, X, other. Other = Google TV, Apple TV, other streaming or download sites. Separate questions from time online (previous figure): duration on the last day of viewing × how often, per channel; not to be added to time online. Social-media and YouTube durations are capped in the questionnaire. Source: CIM Establishment Survey ES26.

For audio, FM radio remains the most widely used channel (chapter 7).

Online, music streaming services take 44 minutes per average day, music on video platforms 16 minutes, live radio via the stations' sites and apps or radio platforms 16 minutes and podcasts 5 minutes.



The age pattern of time online returns in these separate measures. Online video takes 255 minutes per average day among 15- to 17-year-olds and 31 among the over-65s; online audio 151 and 20 minutes. Because these totals add up separate questions per channel, they indicate scale rather than exact viewing and listening time.

What people do online

Time is one side of internet use; what people do online is another. This part is about reach, not duration: the share of Belgians who used the internet for an activity in the past months. That range widened across the board: search to 77,3% (+4,6), internet telephony to 66,0% (+5,1), email and chat to 83,5% (+2,5), social media to 73,4% (+2,5) and downloading applications to 39,6% (+3,9). None of these movements is large on its own; together they describe a population that uses the internet for more and more purposes.

Devices used to go online

The smartphone is the main route online, used by 82,5% (+1,5) of Belgians in the past 30 days. The laptop at home follows at 47,1% (-2,4). Going online via the television set reaches 29,2% (+1,9), level with the tablet (28,6%, +0,3). The smartwatch, measured for the first time, is used to go online by 9,8%.





ARTIFICIAL INTELLIGENCE

04

A year of adoption, and a widening gap

Last year AI was a new line in the questionnaire. This year it is the largest movement in the study, and the gap between groups grew with it.

4. Adoption rose sharply, and the gap grew with it

ES25 found that one Belgian in four used AI, and warned that the figure might be out of date by publication. It was: in ES26, AI use stands at 40,4% (+15,0).

Adoption rose in every group, but furthest among those who had already adopted it most. Among Belgians with a master’s degree, use climbed to 61,0% (+18,6). Among those with no qualification beyond primary school, it climbed to 24,3% (+9,1). The gap between the two grew from 27 points in ES25 to 37 in ES26.

AI use by education level, ES25 and ES26.

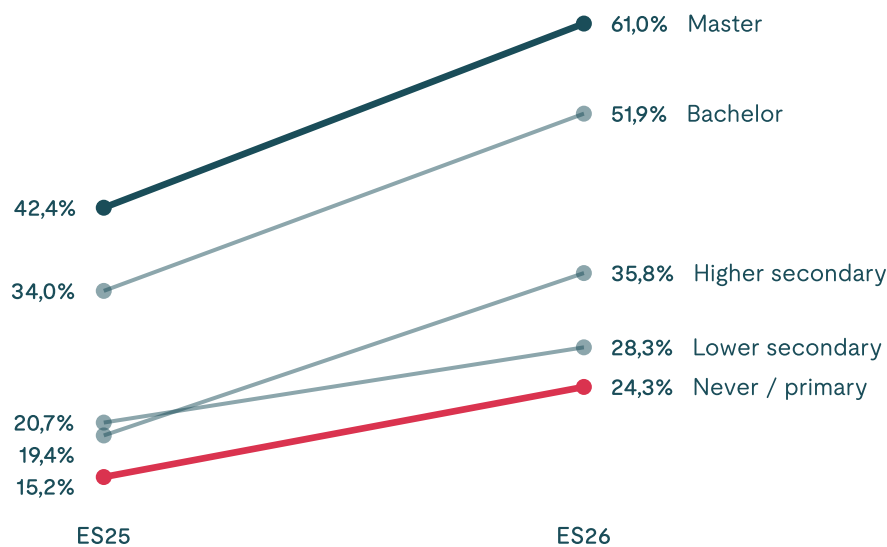
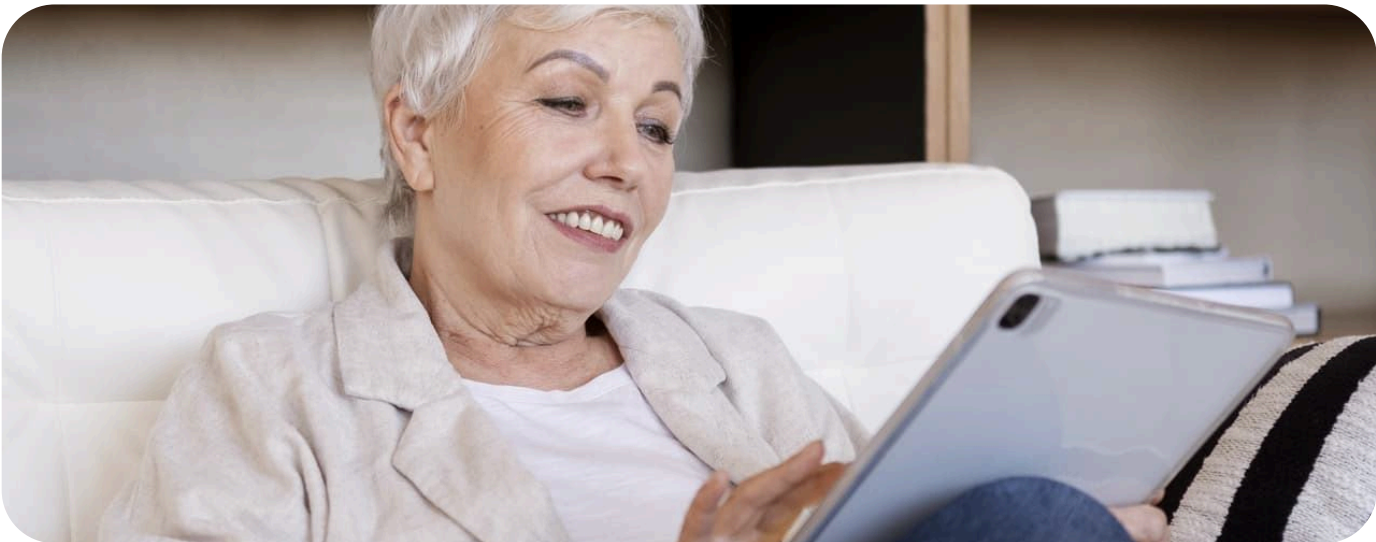


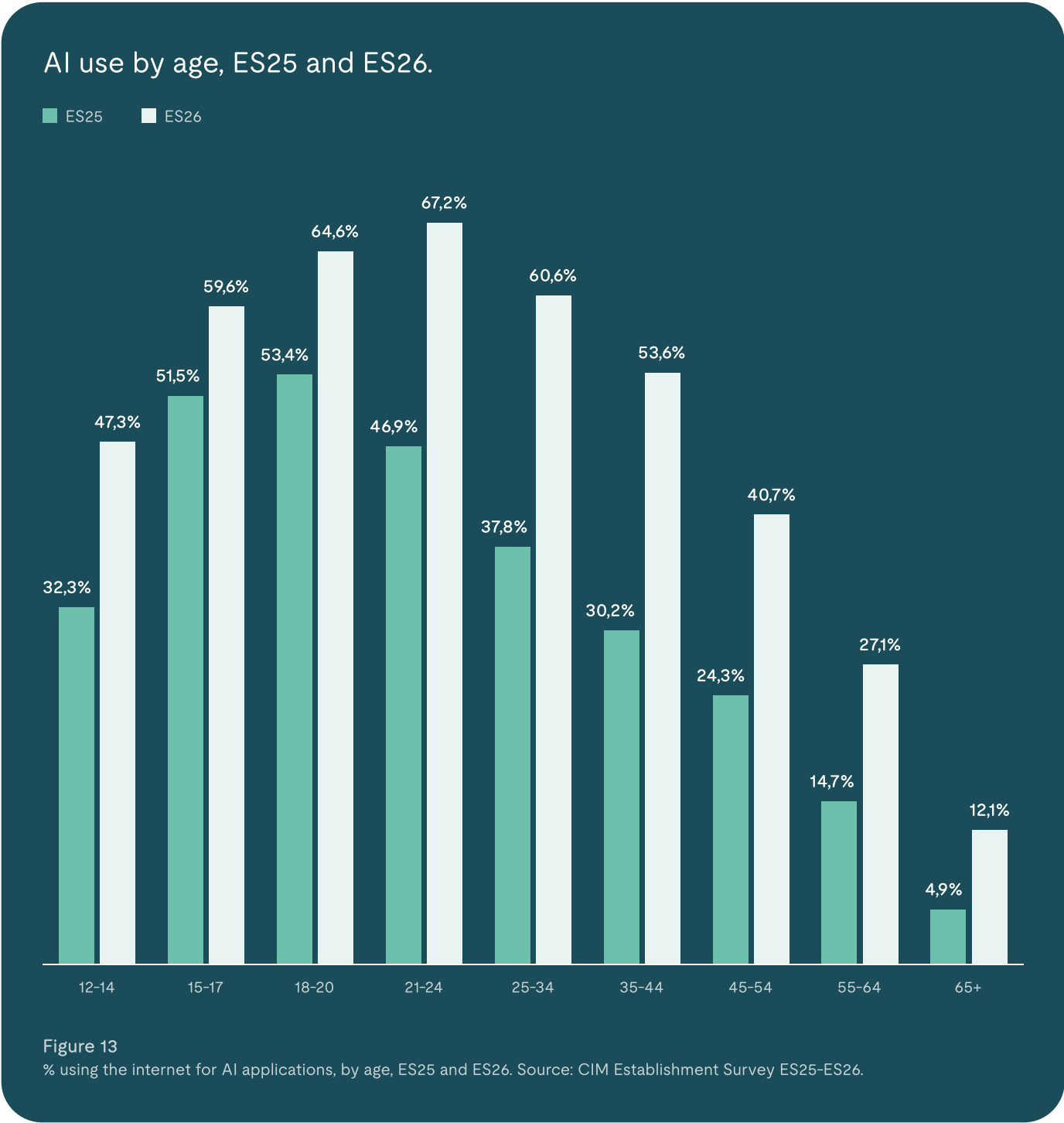
Figure 12
% using the internet for AI applications, by education level, ES25 and ES26. Gap between master’s degree and primary education or none: 27 points in ES25, 37 points in ES26. Source: CIM Establishment Survey ES25-ES26.



The same shape by age and social group

Use is highest among 21- to 24-year-olds (67,2%, +20,3) and lowest among the over-65s (12,1%, +7,2). The largest increases are in the middle: 23 points among 25- to 34-year-olds and 23 points among 35- to 44-year-olds. AI adoption in Belgium is led by people of working age.

Social group shows the same pattern, from 65,9% (+16,5) in the highest group to 20,6% (+7,3) in the lowest. Three independent cuts tell the same story: adoption is broad, it is uneven, and the unevenness grew this year.





PRIVACY

05

What people believe, and what they do

Belgians say they care about their privacy online. What they do about it depends largely on whether the choice is put in front of them.

5. Friction, not conviction

Internet users are close to unanimous on the principle: **95% agree that protecting their privacy online matters**, and 86% say they try to avoid advertising (both asked for the first time this year).

The behaviour is more selective. Refusing cookies rose to 57,9% (+8,3) and refusing to share personal data to 50,5% (+7,6).

Each of these is a decision taken in a dialog box that appears without being sought.

The measures that require initiative moved less: deleting browsing history to 31,5% (+4,2) and changing browser privacy settings to 23,1% (+3,1). VPN use (16,2%, +0,8) and alternative browsers (14,8%, +1,2) barely moved, and private browsing fell to 14,1% (-2,6).

What people do to protect their privacy online: change ES26 vs ES25.

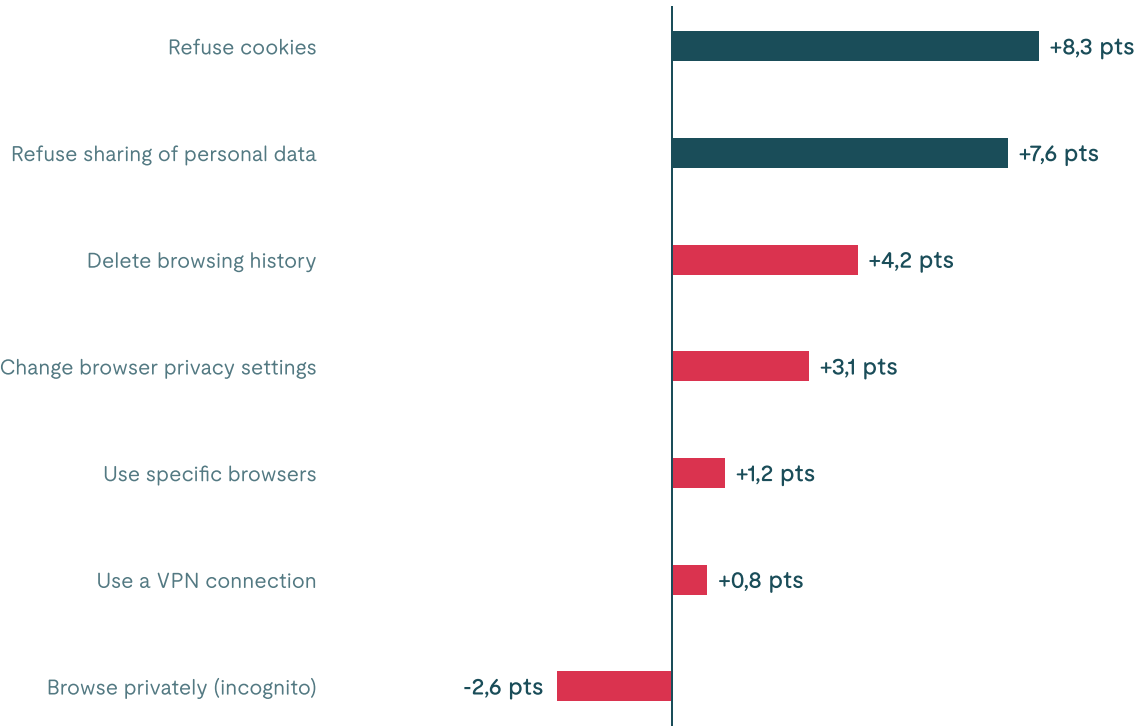


Figure 14
What people do to protect their privacy online: change ES26 compared with ES25, in percentage points, internet users. Teal: offered by a consent dialog. Red: requires the user to act. Only options asked in both years. Source: CIM Establishment Survey ES25-ES26.

When we then look at the separate question on avoiding advertising online, the same pattern returns: refusing cookies rose most (49,6%, +7,0), ahead of installing an ad blocker (27,6%, +2,7) and changing browser settings (11,1%, +2,8).

What people do to avoid advertising online: change ES26 vs ES25.

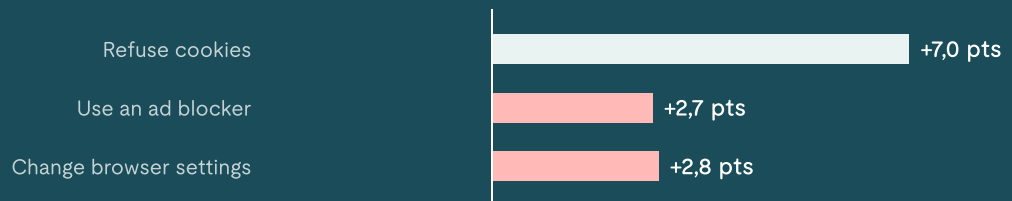


Figure 15

What people do to avoid advertising online: change ES26 compared with ES25, in percentage points, internet users. Teal: offered by a consent dialog. Red: requires the user to act. Only options asked in both years. Source: CIM Establishment Survey ES25-ES26.

Taking no measure at all is now the exception: the share of internet users who do nothing fell to 17,4% (-7,3). That makes the next finding stand out.



Teenagers take fewer privacy measures

Internet users aged 12 to 17 take privacy measures less often than adults. 22,7% of them take none of the measures asked in both years, against 16,9% of internet users aged 18 and over. They also refuse cookies less often (50,4% against 58,6%), and fewer use a VPN (9,1% against 16,9%).

Within this group, the youngest stand out. A third of 12- to 14-year-olds (33,7%) take no measure, against 17,3% of 15- to 17-year-olds. Last year both groups were at about a third; since then the share has fallen among 15- to 17-year-olds (-14,5), not among 12- to 14-year-olds (+0,8). The youngest group is small, so this is an indication rather than a precise measure.

Privacy behaviour, 12-17 against 18 and over, ES26.

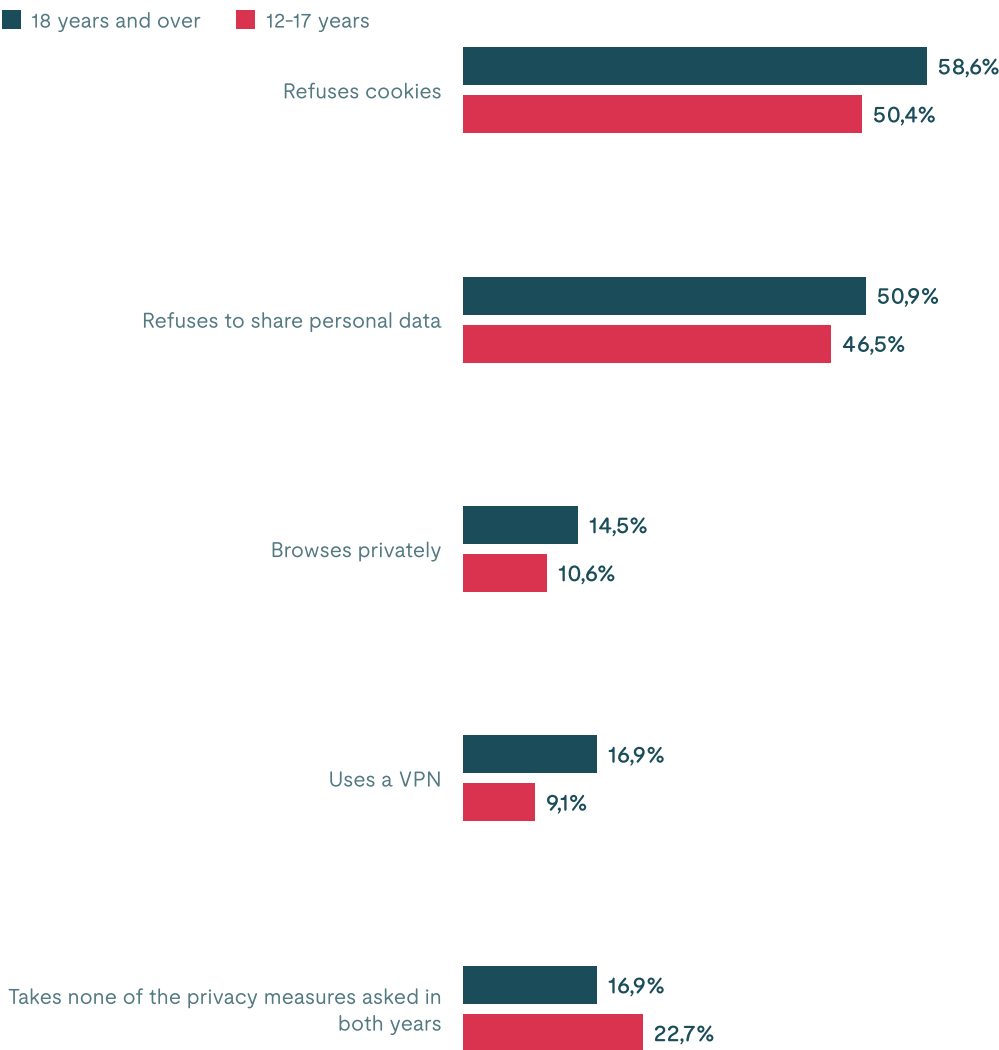


Figure 16
% of internet users in each age group, ES26. Question on what people do to protect their privacy online. Source: CIM Establishment Survey ES26.



VIDEO

06

Live television anchors the landscape

No other type of video reaches as many Belgians as live television. The broadcasters also reach viewers through their own sites and apps, and those matter most where live television reaches fewer people.

6. Live television remains the reference

It reaches 69,3% (-3,9) of the population; nearly half of Belgians (45,8%, -2,8) watch it daily. Counting television programmes in any form – live, recorded, afterwards via a site, app or replay service, before broadcast, or as films, series and fragments on the TV channels' own sites and apps – 84,3% of Belgians watch them, including 71,4% of the under-35s.

The other types of video each have their own place. Videos on YouTube and similar platforms reach 58,0% (+1,1), films or series via a streaming service 43,4% (+0,2), recorded television 43,2% (-5,5) and video on social media 36,9% (+2,1).

Types of TV programmes and videos watched in the past months, ES25 and ES26.

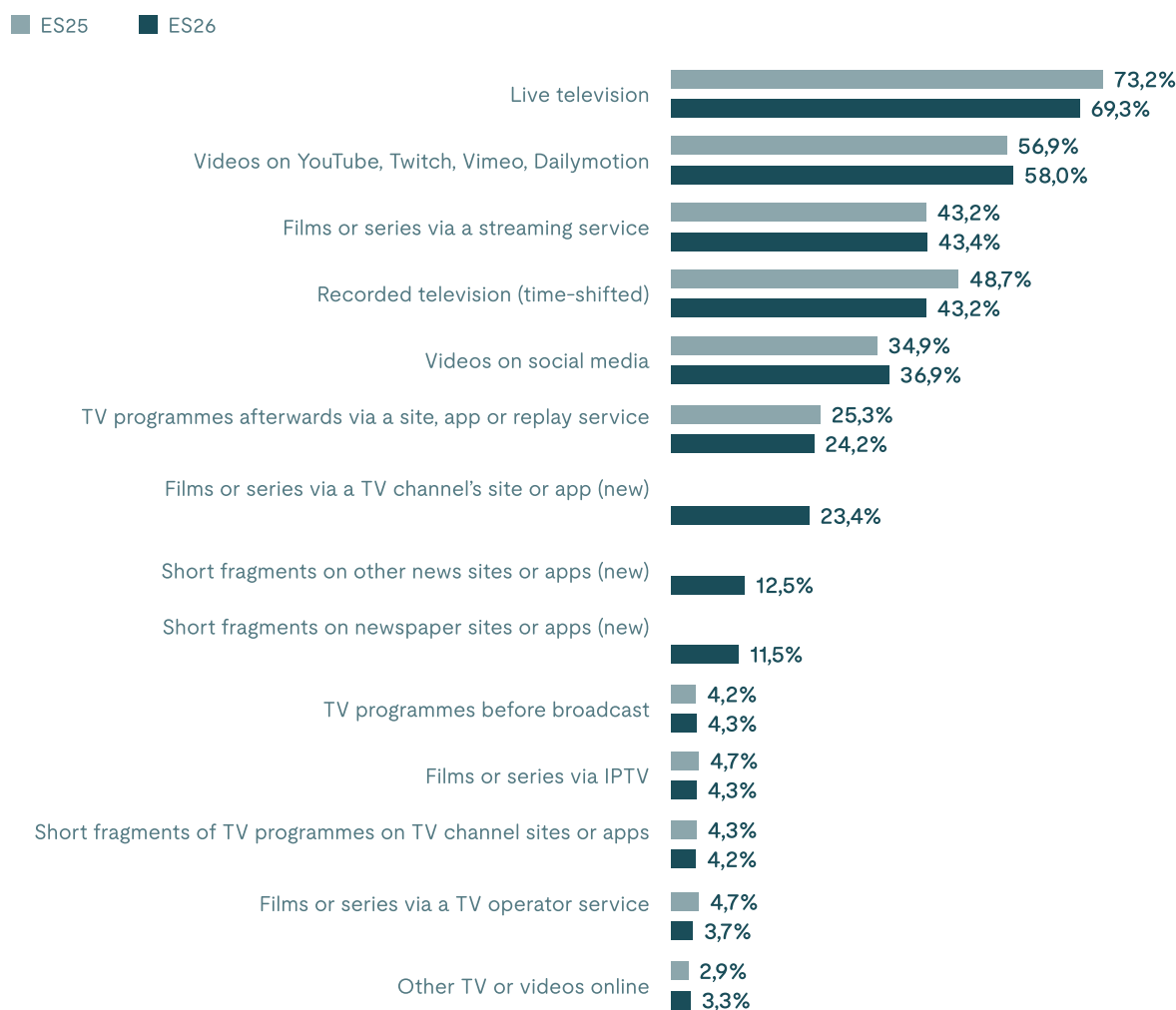


Figure 17

Types of TV programmes and videos watched in the past months, % of Belgians aged 12+, ES25 and ES26. (new) = answer option added in ES26. Source: CIM Establishment Survey ES25-ES26.

Definition: In this report, broadcaster sites and apps means that someone watched video or TV programmes on at least one of the TV channels' sites or apps named in the questionnaire: VRT MAX, VTM GO, GoPlay, VRT NWS, Sporza, Ketnet and other VRT sites or apps for Dutch-speaking respondents; Auvio, RTBF.be, RTL Play, RTL Info, TF1+, M6+, AB3, ABXplore, LN24 and C8/MyCanal for French-speaking respondents.

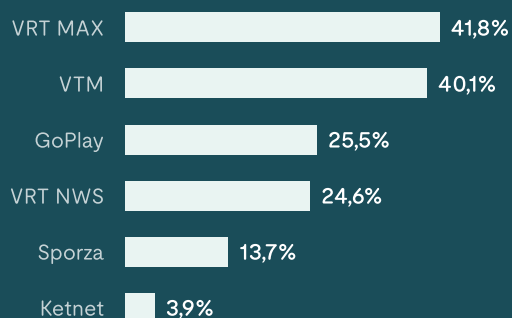
Broadcasters online

Broadcasters are not found only through traditional media. 53,3% of Belgians watch video or TV programmes on broadcaster sites and apps (+1,2): 60,5% of Dutch-speaking and 44,1% of French-speaking Belgians. These services carry the channels' programmes live, as catch-up after broadcast and on demand, alongside news and sport.

In the north, VRT MAX (41,8%) and VTM (40,1%) lead, followed by GoPlay (25,5%) and VRT NWS (24,6%). In the south, Auvio (30,7%) leads RTL Play (21,4%) and TF1+ (14,3%).

Use of broadcaster sites and apps, by language community, ES26.

Dutch-speaking Belgians



French-speaking Belgians

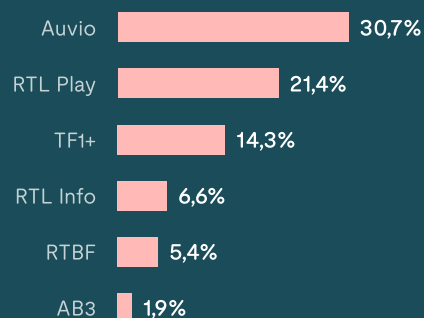


Figure 18

% who watched video or TV programmes on each TV channel's site or app, ES26 – left: Dutch-speaking, right: French-speaking. Six largest per language community. Source: CIM Establishment Survey ES26.

Age: two routes to the same broadcasters

Live television still reaches more than half of Belgians in every age group from 35 upward (58,3%, -7,2, among 35- to 44-year-olds) and 91,7% (-0,9) of the over-65s. Among the under-35s it reaches around half (49,7%, -5,9).

The broadcasters' sites and apps follow a different age curve. They reach around six in ten in every group between 18 and 54, more than live television does among 18- to 34-year-olds. Counting each person once, live television or broadcaster sites and apps reach 84,7% of Belgians, against 69,3% for live television alone, and 74,3% of the under-35s, against 49,7%.

Among Belgians who do not watch live television, half (50%) watch video or TV programmes on broadcaster sites and apps.

Live television, broadcaster sites and apps, and both combined, by age, ES26.

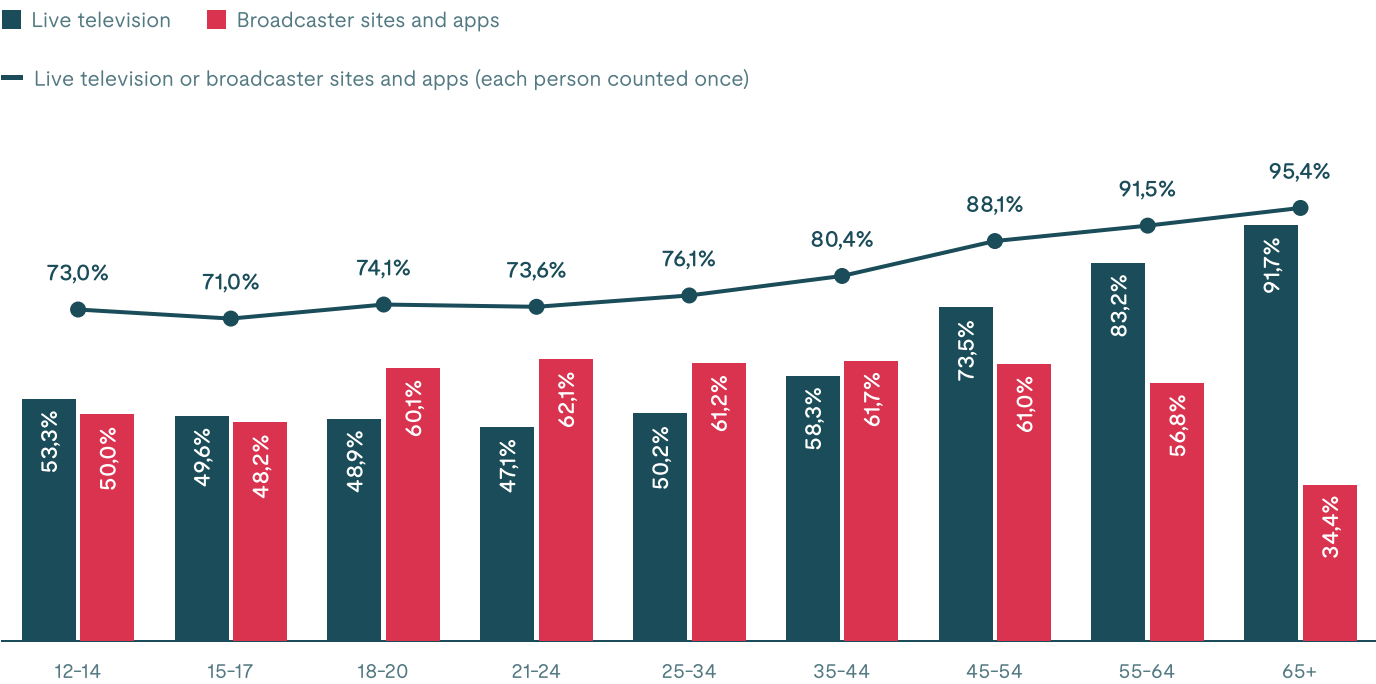


Figure 19
% of each age group, ES26. Broadcaster sites and apps = watched video or TV programmes on at least one of the TV channels' sites or apps named in the questionnaire (VRT MAX, VTM/VTM GO, GoPlay, VRT NWS, Sporza, Ketnet, other VRT; Auvio, RTBF.be, RTL Play, RTL Info, TF1+, M6+, AB3, ABXplore, LN24, C8/MyCanal). Source: CIM Establishment Survey ES26.

Combining, not choosing

For most Belgians, broadcast content and online video are not a choice between two options. Of all Belgians, 61% combine broadcast content (live television or broadcaster sites and apps) with streaming services, YouTube or social video, and 24% watch broadcast content only. Among the under-35s, 74% watch broadcast content and nearly all of them also watch online (71%); one in five (22%) watch video only online. Among the over-65s, six in ten (61%) watch broadcast content only.

Mobile and social video

Viewing on the smartphone and on social media became more frequent. Daily video viewing on social media rose to 26,5% (+3,4) and daily video viewing on a smartphone to 34,3% (+3,5), while 48,4% (+3,6) use the internet to watch video. Broadcast content keeps the widest reach, and most Belgians who watch it also watch video online.





AUDIO

07

Radio leads, in the home and in the car

Radio's strength lies in its reach, at home and in the car. Streaming adds a second route, used mainly by younger listeners.

7. FM radio remains the largest audio channel

Live radio via FM is the most widely used type of audio in Belgium, reaching 44,2% (-5,1) of the population; one in four (24,8%, -3,5) listens daily. Online radio and podcasts reach 22,9% of Belgians, each person counted once: live radio via a station's site or app (12,0%) or an online radio platform (4,5%), together with audio podcasts or time-shifted radio (12,0%).

Among the other types of audio, an audio streaming service reaches 36,7% (+3,4), live radio via DAB+ 28,2% (+0,7) and music via a video platform 25,7% (+0,9). The significant movements this year are lower reach for FM and higher reach for audio streaming services; the other types are stable.

Types of radio and audio listened to in the past months, ES25 and ES26.

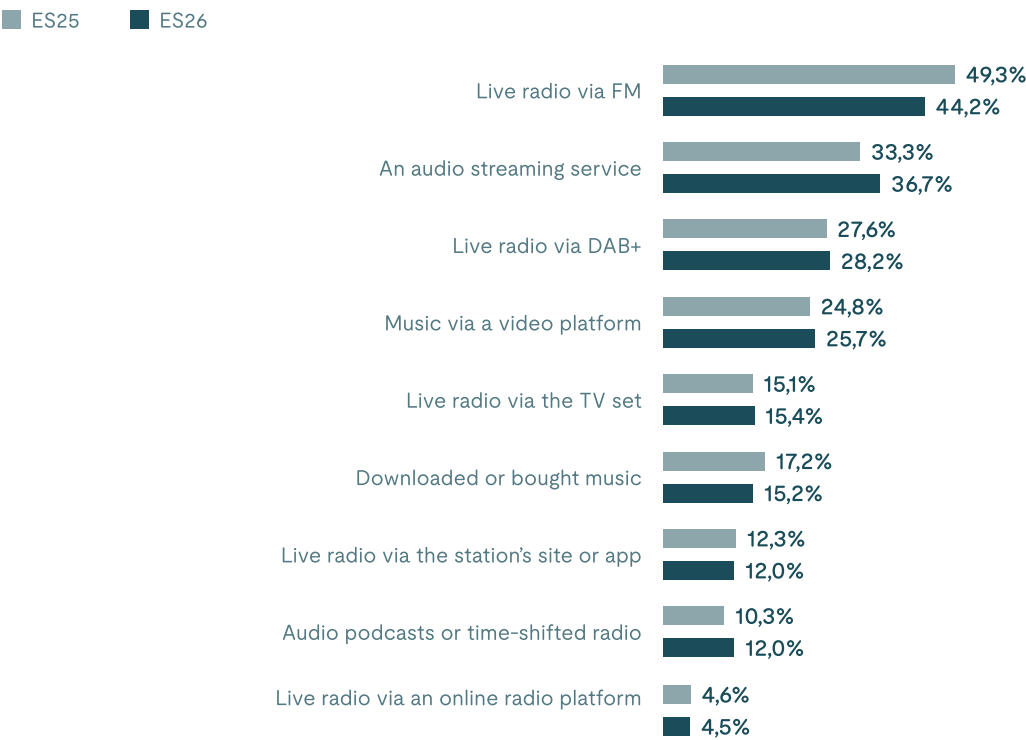
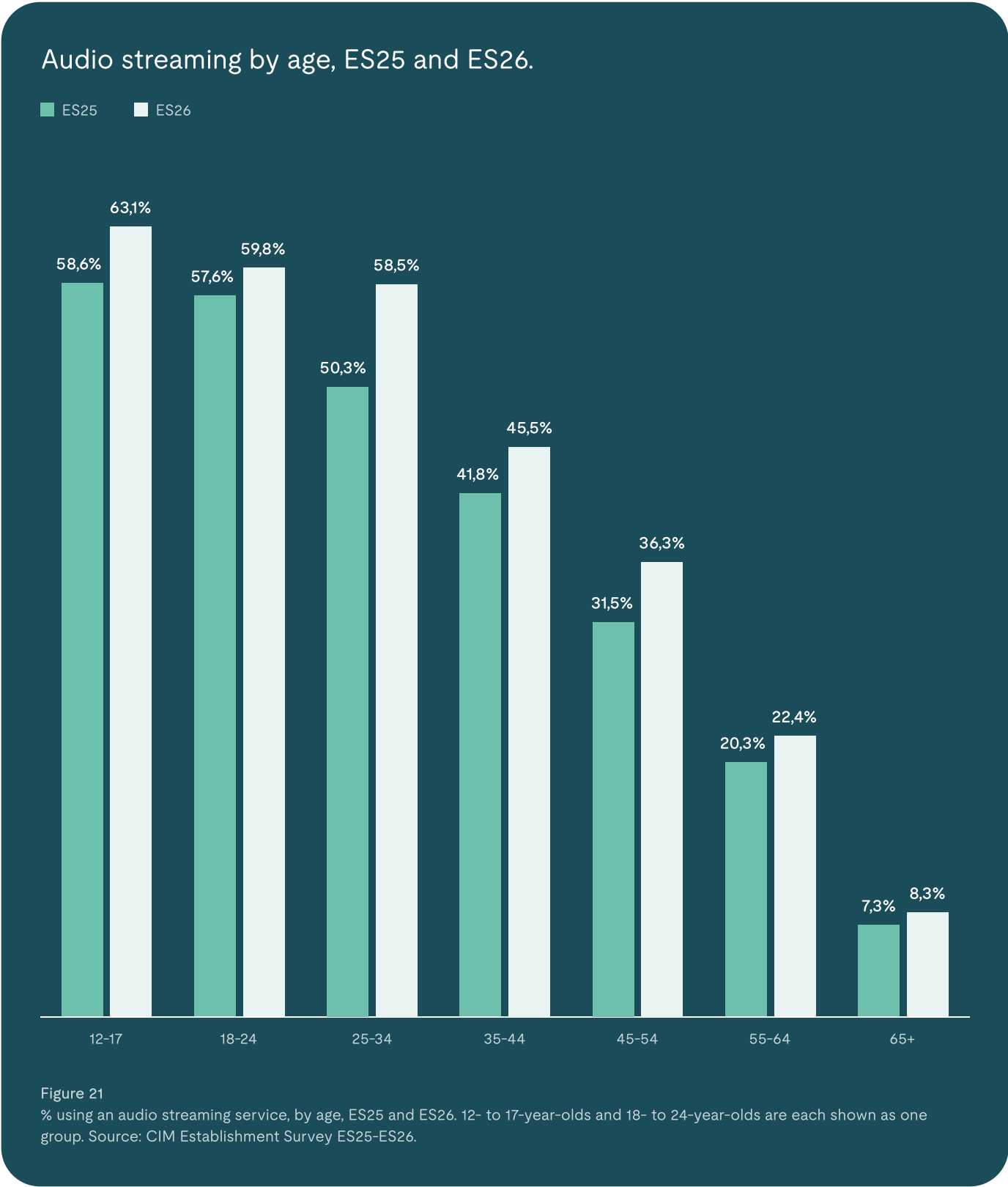


Figure 20
Types of radio or audio listened to in the past months, % of Belgians aged 12+, ES25 and ES26. Source: CIM Establishment Survey ES25-ES26.

In separate questions, six in ten Belgians (60,8%, -2,9) say they listen to the radio via a car radio, one in four (25,7%, +3,8) has a paid subscription to an audio streaming service, and 45,6% (+5,5) use the internet for radio, music or podcasts.

Streaming by age

Audio streaming is concentrated among the under-35s, at 59% to 63%, against 22% of 55- to 64-year-olds and 8% of the over-65s. This year it rose among 25- to 34-year-olds (58,5%, +8,3); among the over-55s it did not change.



Podcasts

Podcasts and time-shifted radio reach 12,0% (+1,6) of Belgians, up from 9,7% two years ago. Listening is highest among 21- to 44-year-olds (19% to 21%) and among those with a master's degree (27%, against 3% with primary education or none).

Men and women listen about equally (12,7% and 11,2%); Dutch-speaking Belgians slightly more often than French-speaking Belgians (13,0% against 10,6%). Most listeners are regular: 73% listen at least weekly.

Podcast listening by group, ES26.

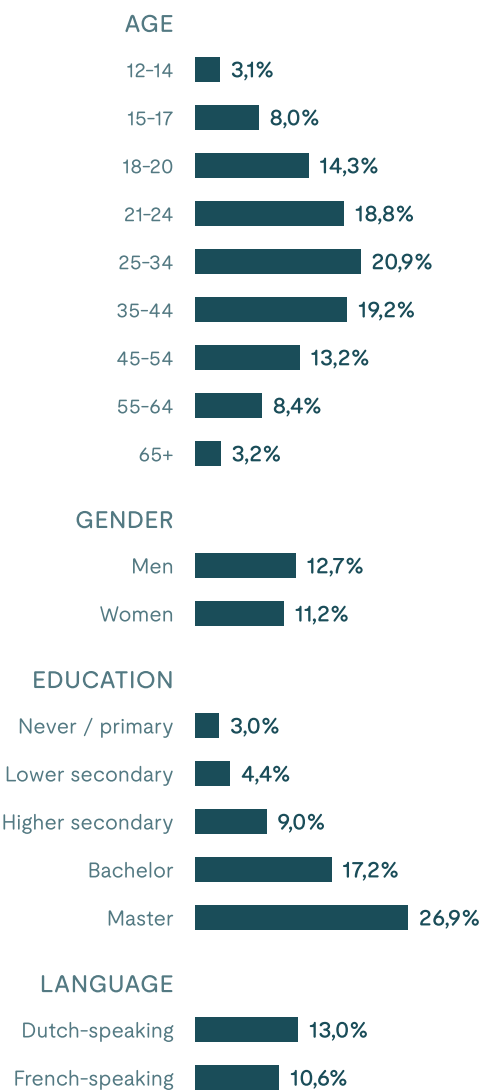
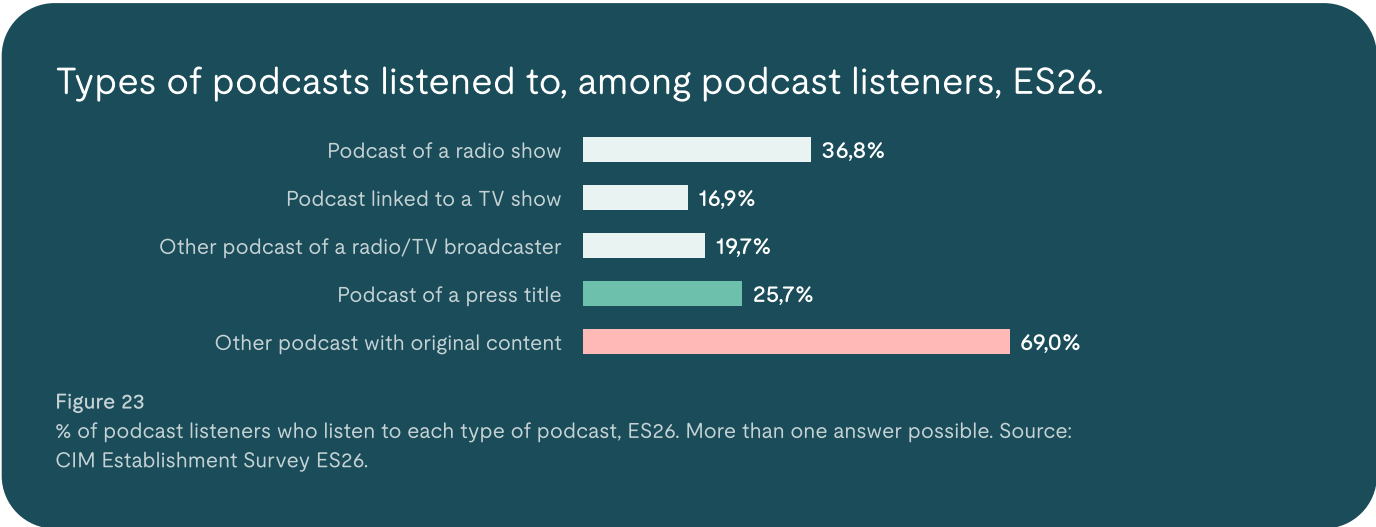


Figure 22
% listening to audio podcasts or time-shifted radio in the past months, by group, ES26. All Belgians: 12,0%. Source: CIM Establishment Survey ES26.

More than half of podcast listeners (53,5%) listen to podcasts from a radio or TV broadcaster, most often the podcast of a radio show (36,8%, -3,3).

A quarter (25,7%, -6,8) listen to podcasts from a press title, and 69,0% (+2,2) to other podcasts with original content.





PLATFORMS

08

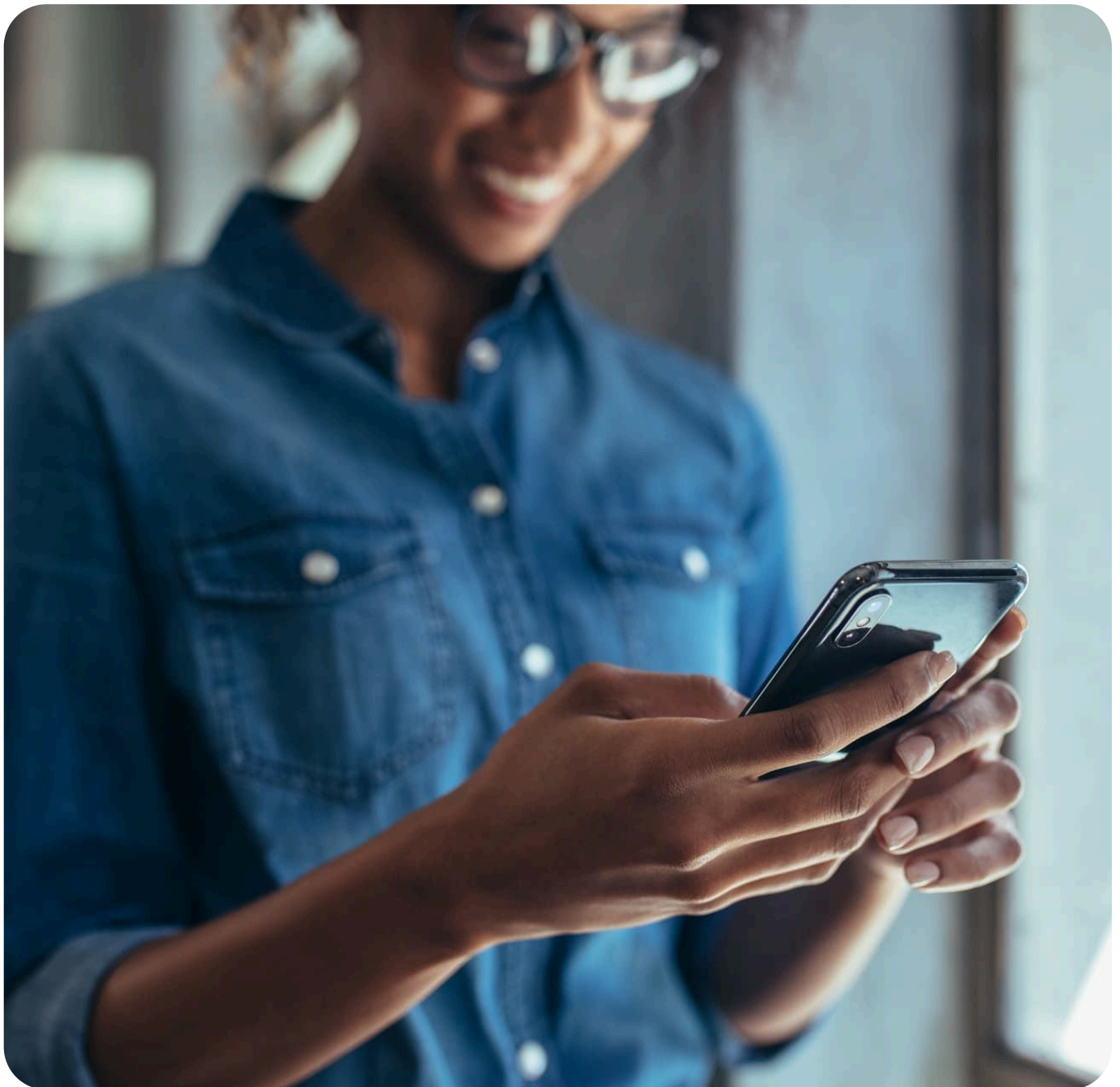
Stable reach, distinct audiences

At the top, the platform landscape barely moved. Below it, each platform has its own audience, shaped by age and gender.

8. A stable top tier

Among the platforms measured in both years, the top of the ranking is unchanged. YouTube (65,0%, -0,1) and Facebook (63,9%, -0,3) have near-identical reach, followed by Instagram (48,0%, +1,3) and Netflix (42,7%, -0,8). TikTok (27,0%, +1,1), Snapchat (21,8%, -0,6), Pinterest (19,3%, +0,2) and LinkedIn (16,3%, +0,5) each serve their own segments.

Two movements stand out below the top tier. Discord rose to 10,1% (+2,4), after a flat year. X is at 7,9% (-1,9), down from 11,5% two years ago. Among the platforms added to the list this year, WhatsApp reaches the most people of all (75,6%) and Messenger 53,9%; HBO Max (5,5%) and Apple TV+ (3,1%) join the streaming services.



Reach and intensity

Reach tells how many people a platform touches; daily use among its users tells how much it is part of their day. Five platforms have daily users making up two-thirds or more of their audience: Snapchat (73%), TikTok (72%), WhatsApp (69%), Facebook (68%) and Instagram (68%). Snapchat's share rose from 66% to 73%.

YouTube, the platform with the largest reach after WhatsApp, has a daily share of 42% (up from 39%), level with Discord and X at 40%. Messenger, also new on the list, has a daily share of 55%. Netflix follows at 32%; the remaining platforms, including the new streaming services, cluster around 17% to 26%.

Platform reach and intensity, ES26.

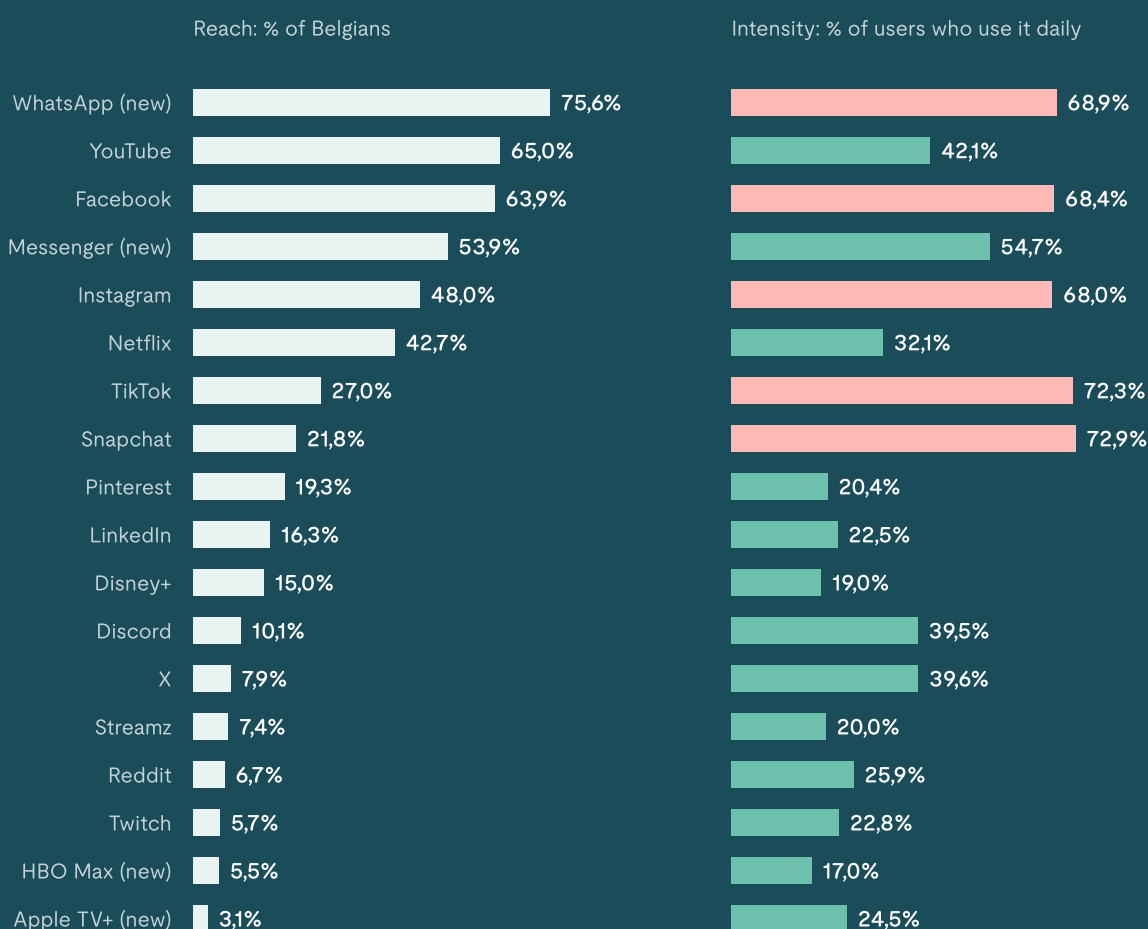


Figure 24

Left: % of Belgians aged 12+ using the site or app in the last 30 days. Right: % of those users who use it daily. ES26. Red on the right: two-thirds or more of users use it daily. (new) = added to the list in ES26. Source: CIM Establishment Survey ES26.

Age: each platform has its own audience

WhatsApp, new on the list, is the most evenly spread across ages: between 75% and 89% in every age group from 12 to 64, and still 51% of the over-65s. Among the platforms measured in both years, YouTube bridges the generations: 83% to 89% of the under-35s, 79% of 35- to 44-year-olds, and still 57% of 55- to 64-year-olds. Facebook has the opposite shape, with 19% of 12- to 14-year-olds and a peak of around 80% among 25- to 44-year-olds. Among the over-65s it reaches 48,9% (+5,9); among 21- to 24-year-olds 63,9% (-9,9).

TikTok and Snapchat are concentrated among teenagers and young adults, both at 87% to 88% of 15- to 17-year-olds and below 40% from age 25. Instagram peaks one step later, at 89% of 18- to 20-year-olds. LinkedIn is a working-age platform, highest among 25- to 44-year-olds (27% to 29%). Discord is concentrated among 18- to 24-year-olds, where it rose most: 32,4% (+12,6) among 21- to 24-year-olds.

Platform use by age, ES26.

	12-14	15-17	18-20	21-24	25-34	35-44	45-54	55-64	65+
WhatsApp (new)	75%	82%	82%	84%	86%	89%	83%	76%	51%
YouTube	84%	87%	85%	89%	83%	79%	67%	57%	32%
Facebook	19%	32%	53%	64%	80%	79%	75%	69%	49%
Instagram	47%	83%	89%	84%	73%	58%	45%	34%	13%
TikTok	61%	88%	80%	68%	39%	22%	16%	10%	3%
Snapchat	69%	87%	77%	64%	30%	13%	9%	4%	2%
Pinterest	26%	38%	40%	34%	26%	20%	15%	16%	7%
LinkedIn	0%	3%	9%	22%	29%	27%	23%	14%	4%
Discord	18%	24%	33%	32%	20%	9%	4%	2%	0%
X	2%	13%	19%	22%	12%	8%	7%	5%	2%

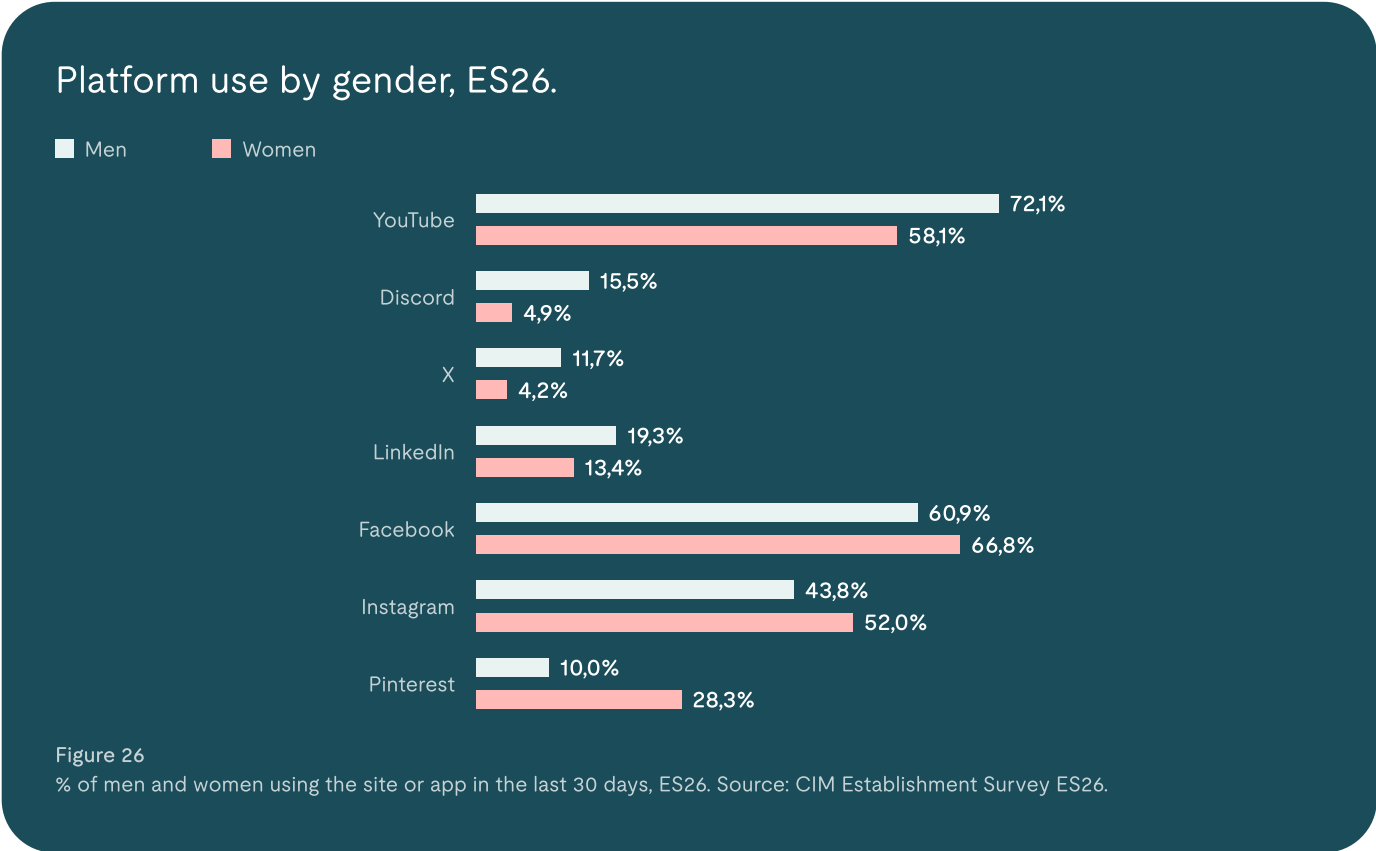
Figure 25

% of each age group using the site or app in the last 30 days, ES26. Darker = higher share. (new) = added to the list in ES26. Source: CIM Establishment Survey ES26.

LENS · Gender

Platform use divides by gender in both directions. Pinterest has the largest gap in the study: 28,3% of women against 10,0% of men. Instagram (52,0% against 43,8%) and Facebook (66,8% against 60,9%) also reach more women.

YouTube (72,1% against 58,1%), Discord (15,5% against 4,9%), X (11,7% against 4,2%) and LinkedIn (19,3% against 13,4%) reach more men. WhatsApp is used equally by men and women (75,1% and 76,1%), and TikTok, Snapchat and Netflix are also close to parity.





FIVE MEDIA GROUPS

09

Bringing the chapters together

The previous chapters look at one medium at a time. Most Belgians combine several – and how they combine them brings the report's threads together.

9. Five ways Belgians combine their media

Grouping Belgians by the combination of media they use – 21 routes across television, video, radio, audio, platforms and AI – gives five groups.

Two things separate the groups: how broad their repertoire is, and how much of it is broadcast. The largest group, Broadcast plus online (30%), sits between the two poles. Cross-media all-rounders (24%) and Social-first (18%) have the broadest repertoires but a different centre of gravity. The two groups with a narrow repertoire, Local Broadcaster Media and Selective online, differ most in age.

Five media groups by breadth and centre of gravity of their repertoire, ES26.

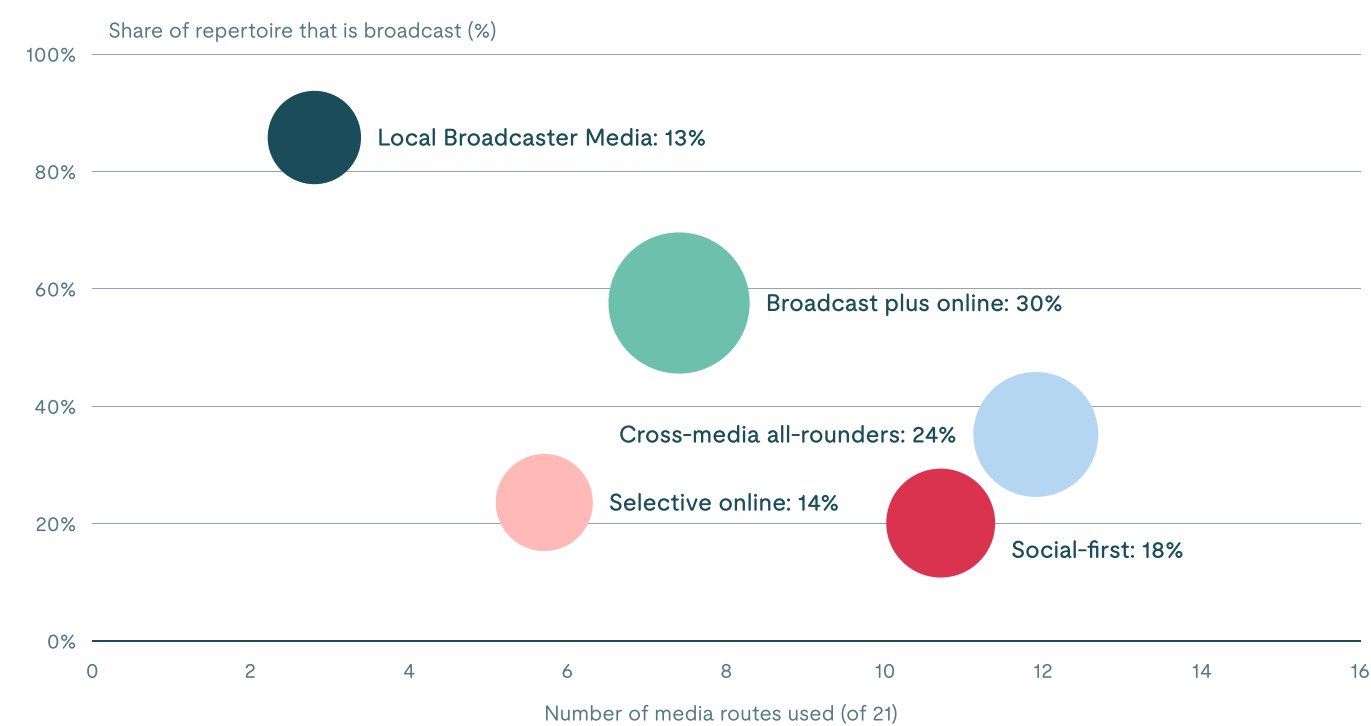


Figure 27
Group averages, ES26. Bubble size = share of the population. Horizontal: number of the 21 media routes used. Vertical: share of those routes that are broadcast (live and recorded TV, broadcaster sites and apps, FM, DAB+, radio apps). Average: 8,2 routes, 44,1%. Source: CIM Establishment Survey ES26.

Age is the clearest dividing line between the groups. Seven in ten in Local Broadcaster Media are aged 65 and over (70,9%), against almost no one in Social-first (0,3%), where two-thirds are aged 12 to 24 (65,4%).

Cross-media all-rounders are mainly aged 25 to 44 (53,7%); Broadcast plus online combines 45- to 64-year-olds (44,6%) and over-65s (37,1%), and Selective online is mainly aged 25 to 54 (56,9%).

Age composition of the five media groups, ES26.

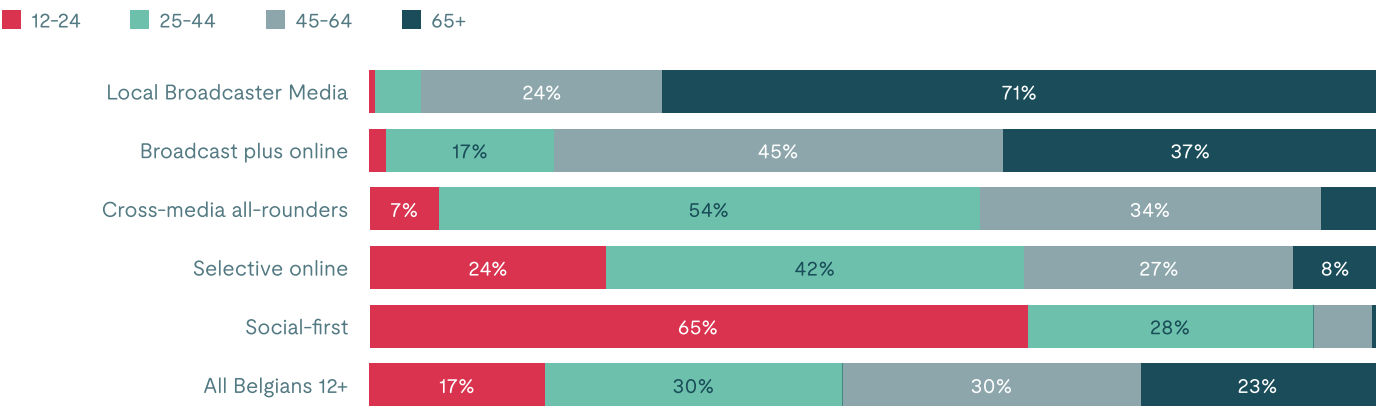


Figure 28
Age composition of each media group, % of the group, ES26. Source: CIM Establishment Survey ES26.

Beyond age, education and language set the groups apart. Cross-media all-rounders are the most highly educated group: 62,0% hold a bachelor’s or master’s degree, against 33,8% of all Belgians.

Local Broadcaster Media has the largest share with at most lower secondary education (45,6%); in Social-first, part of the group is still in school, so their education level is not final.

Education level of the five media groups, ES26.

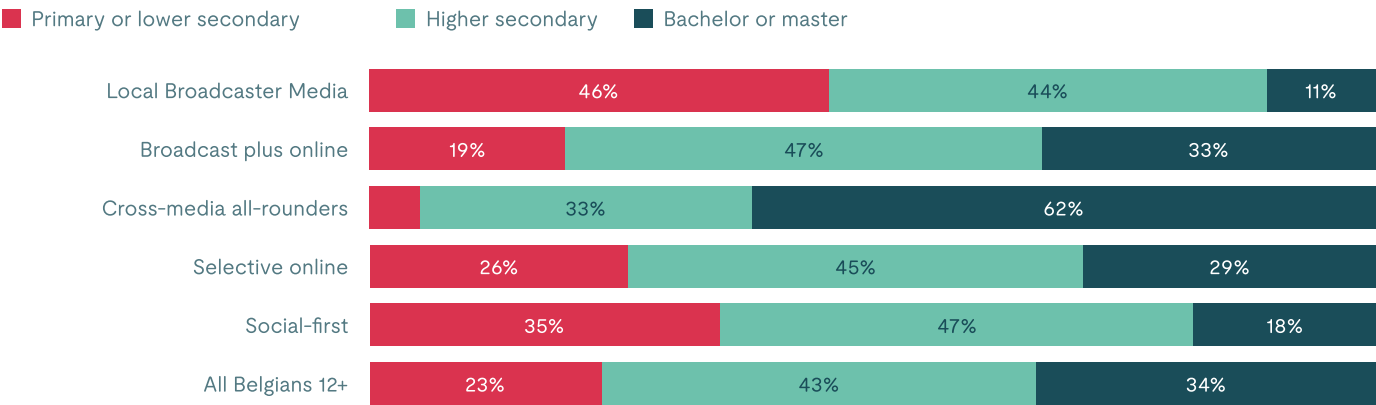
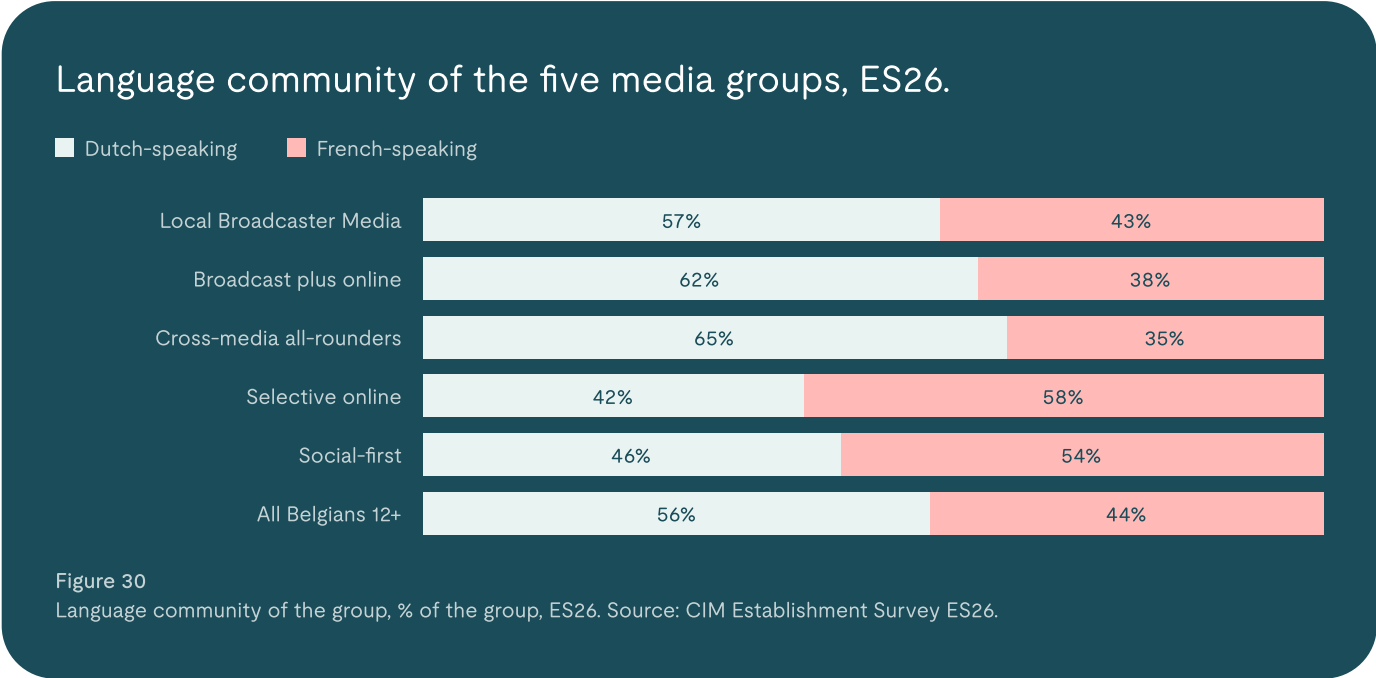


Figure 29
Education level of the group (respondent’s own; still in school counts as attained level), % of the group, ES26. Source: CIM Establishment Survey ES26.

Selective online and Social-first are the only groups in which French-speaking Belgians form the majority (57,7% and 53,6%, against 43,7% of all Belgians); Cross-media all-rounders are the most Dutch-speaking group (64,9%).



The five groups

Local Broadcaster Media (13%). Mostly aged 65 and over (71%); four in ten (43%) are not online. Live television (89%, 80% daily) and FM radio (59%) make up almost their entire repertoire of about three routes. Broadcast plus online (30%). The largest group, mostly aged 55 and over (63%). Live and recorded television (91% and 74%), radio (FM 57%, car radio 76%), with WhatsApp (80%) and Facebook (71%) as practical online additions. Live television or broadcaster sites and apps reach 96% of this group, the highest of all. Cross-media all-rounders (24%). Mainly aged 25 to 54 (75%) and more often highly educated. The broadest repertoire, about 12 routes: the highest use of broadcaster sites and apps (82%) alongside live television (66%), streaming services (73%), audio streaming (73%) and AI (79%).

Selective online (14%). Mainly aged 25 to 54 (57%) and more often French-speaking (58%). A narrow, mostly online repertoire built on YouTube (67%), WhatsApp (72%) and Facebook (53%). Live television reaches a third of this group (30%); live television or broadcaster sites and apps reach 53%. **Social-first (18%).** Two-thirds aged 12 to 24 (65%). Instagram (92%), TikTok (91%), Snapchat (87%) and YouTube (87%) lead a broad repertoire. Live television reaches 53%; together with broadcaster sites and apps, three in four (76%).

What the groups show

The groups tie the report’s two main lines together. Four of the five are online almost daily (92% to 98%), yet their repertoires range from about 6 to 12 routes: access no longer separates them, use does. And live television or broadcaster sites and apps reach at least nine in ten (90% to 96%) in the three groups that together make up two-thirds of the population.

Use of selected media routes by group, ES26.

	Live TV	Recorded TV	Broadcaster sites/apps	Live FM	Live DAB+	WhatsApp	Facebook	YouTube video	Streaming services	Audio streaming	Instagram	TikTok	Snapchat	AI
Local Broadcaster Media	89%	27%	5%	59%	9%	14%	22%	4%	3%	0%	0%	0%	0%	0%
Broadcast plus online	91%	74%	60%	57%	38%	80%	71%	41%	28%	13%	26%	5%	3%	17%
Cross-media all-rounders	66%	52%	82%	45%	49%	97%	87%	82%	73%	73%	76%	20%	12%	79%
Selective online	30%	2%	32%	24%	8%	72%	53%	67%	35%	29%	37%	30%	16%	30%
Social-first	53%	24%	56%	27%	14%	89%	61%	87%	75%	63%	92%	91%	87%	67%

Figure 31
% of each group using each media route, ES26. Selection of the 21 routes used to form the groups. Source: CIM Establishment Survey ES26.



NEW IN ES26

10

What the study measures for the first time

Several questions enter the study this year. The results below are baselines; next year they become trends.

10. New questions, first results

The smartwatch

The smartwatch enters at scale: 31,3% of Belgians live in a household with one, 21,9% wear one themselves and 9,8% use it to go online.

Once there is a smartwatch in the household, 70% of household members use one personally. Use peaks among 25- to 44-year-olds (32% to 34%), against 8,8% of the over-65s, and runs from 28,9% in the highest social group (1) to 13,4% in the lowest (8).

Personal use of a smartwatch, by age, ES26.

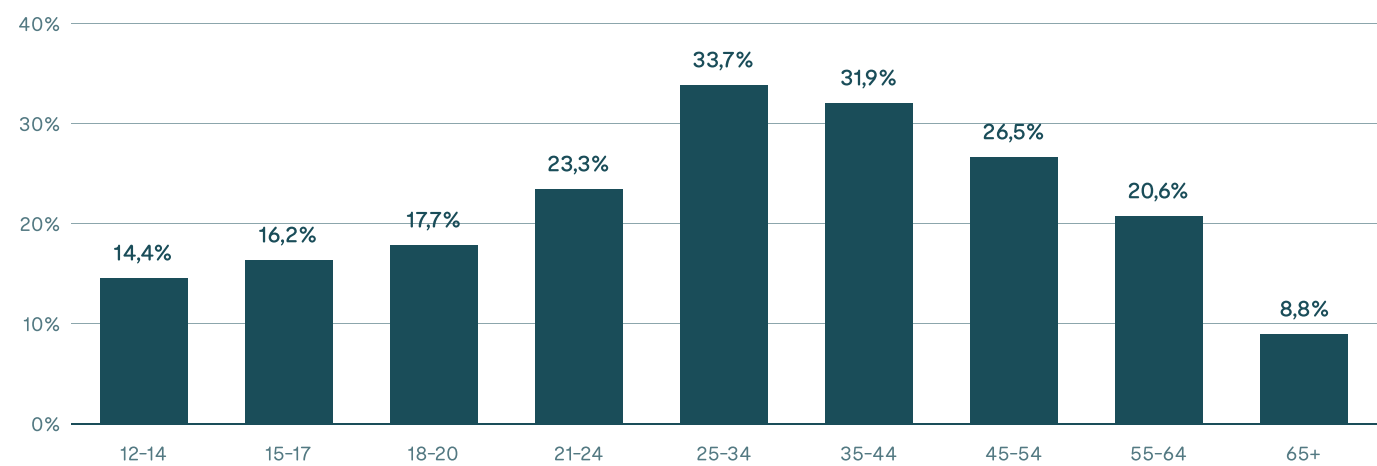


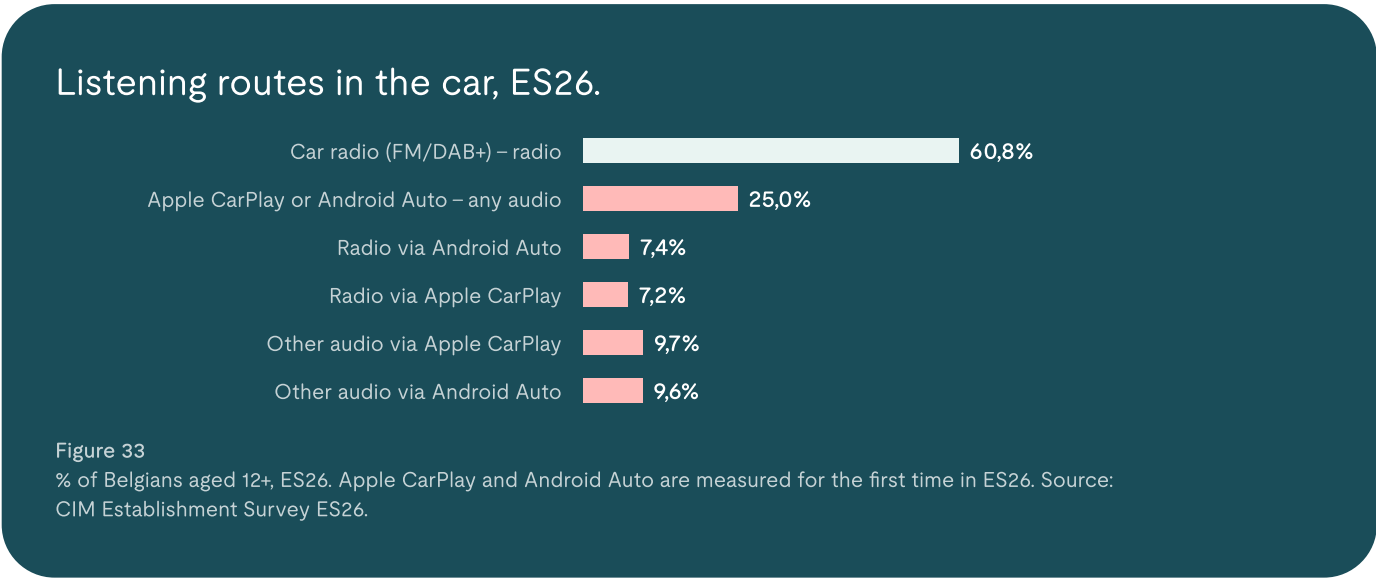
Figure 32
% who personally use a smartwatch, by age, ES26. Question asked for the first time in ES26. Source: CIM Establishment Survey ES26.



The car dashboard as an audio route

Two Belgians in three (67,8%) listen to something in the car, most often via the car radio (60,8%). One Belgian in four (25,0%) uses Apple CarPlay or Android Auto.

These interfaces also carry radio: 7,4% of Belgians listen to radio via Android Auto and 7,2% via Apple CarPlay. Among dashboard users, just over half (52%) use them for radio.



Attitudes to privacy and advertising online

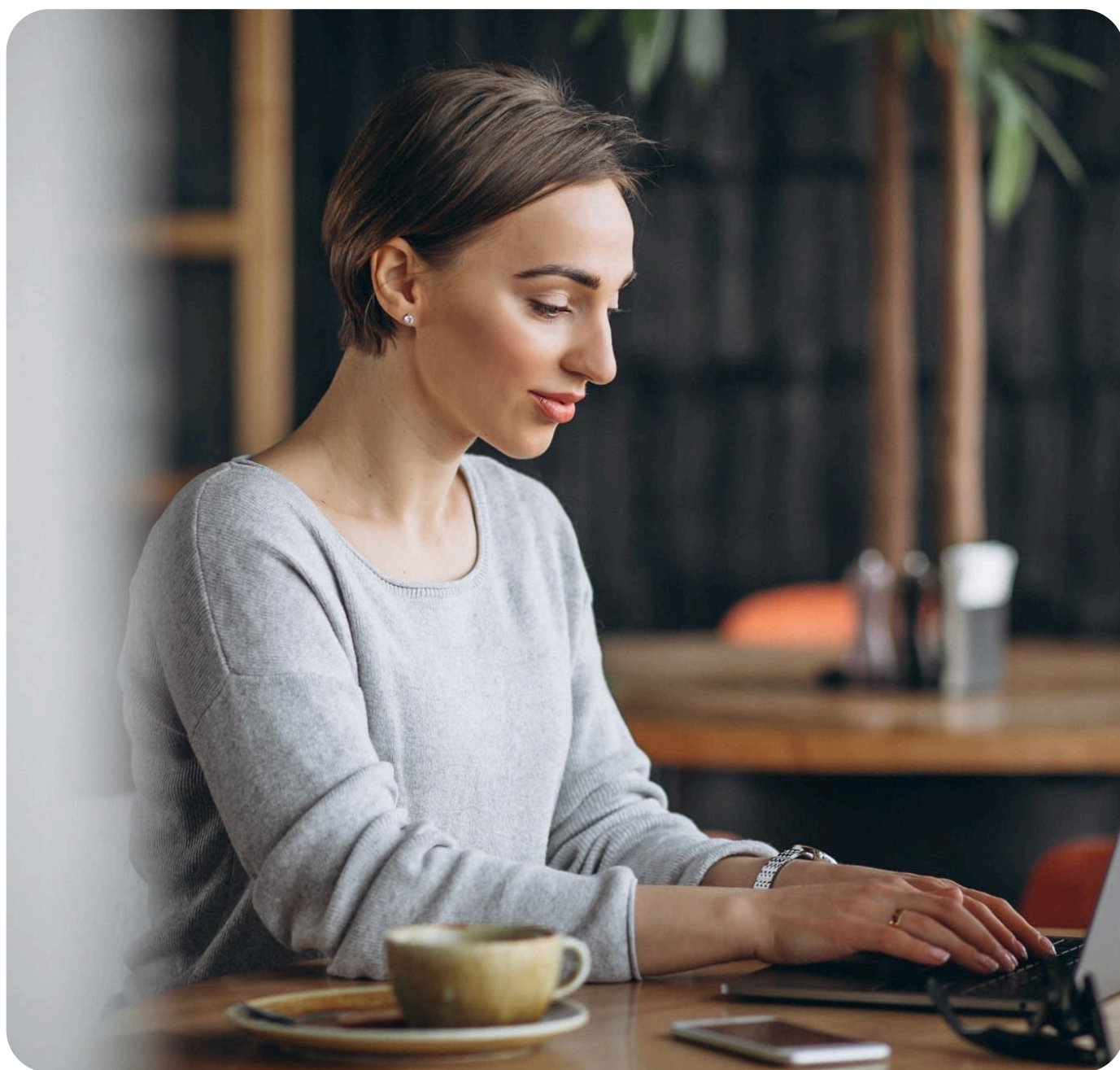
Chapter 5 opened with two attitudes measured for the first time this year. Most of that agreement is firm: 68% of internet users agree totally that protecting their privacy online matters, and half (50%) agree totally that they try to avoid advertising. 7,0% say they pay for a version without advertising, rising to 9% to 11% among 21- to 44-year-olds.

Other additions, briefly: WhatsApp (75,6%), Messenger (53,9%), HBO Max (5,5%) and Apple TV+ (3,1%) join the list of platforms (chapter 8), DIGI joins the TV operators, and a new question covers video on the sites and apps of news brands.

Closing remarks

This concludes the 2026 CIM Establishment Survey report. Full detailed results are available to our subscribers. Most of our data is also freely available through our [interactive dashboard](#).

For questions about the CIM Establishment Survey, the data or this report, please contact crossmedia@cim.be.



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