

TGM 2025

Highlights



Consumption & Lifestyle Survey

1.200

Questions

10.000+

Answer
Options

8.000

Interviews

26

Survey
Modules



Introduction

The CIM Target Group Monitor collects information on attitudes, purchasing responsibility, and consumption habits of the Belgian population. It provides valuable insights to better understand the target groups of Belgian media.

We selected a few interesting trends and developments in the data to give you a sneak preview of the full publication of TGM 2025.

This is only a sneak preview, subscribers are encouraged to dive into the data to uncover deeper insights and trends.

Please visit our site for more details:

[NL: Methodologie | CIM](#)

[FR: Méthodologie | CIM](#)

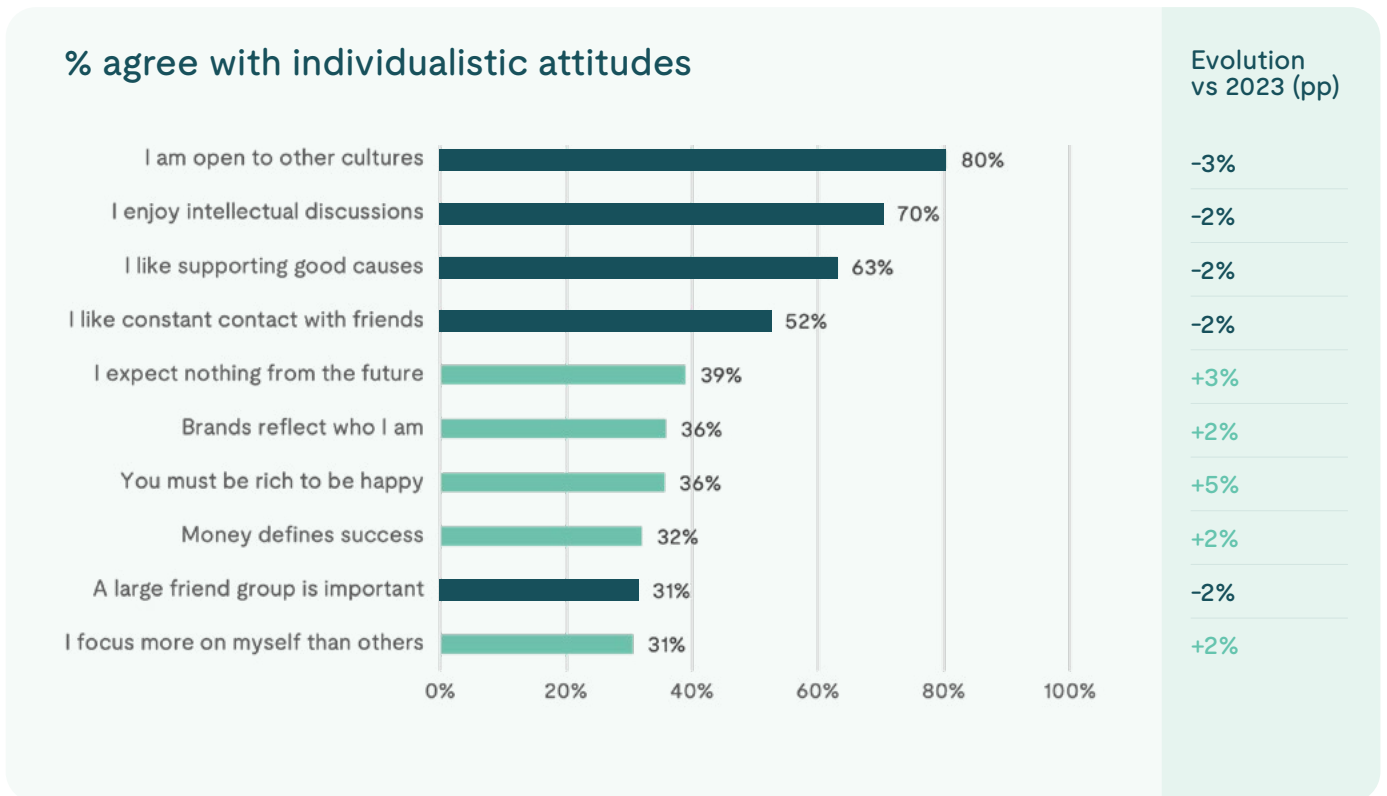
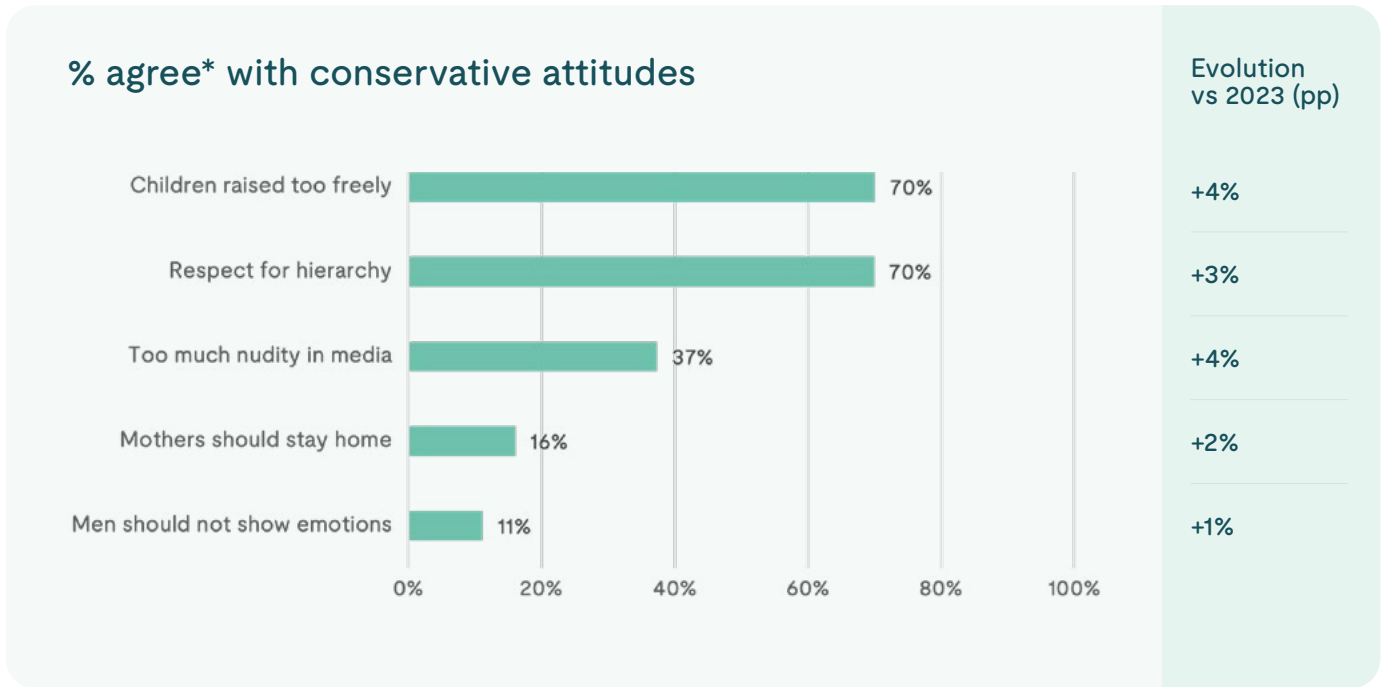
Social trends

The bigger picture

Societal attitudes

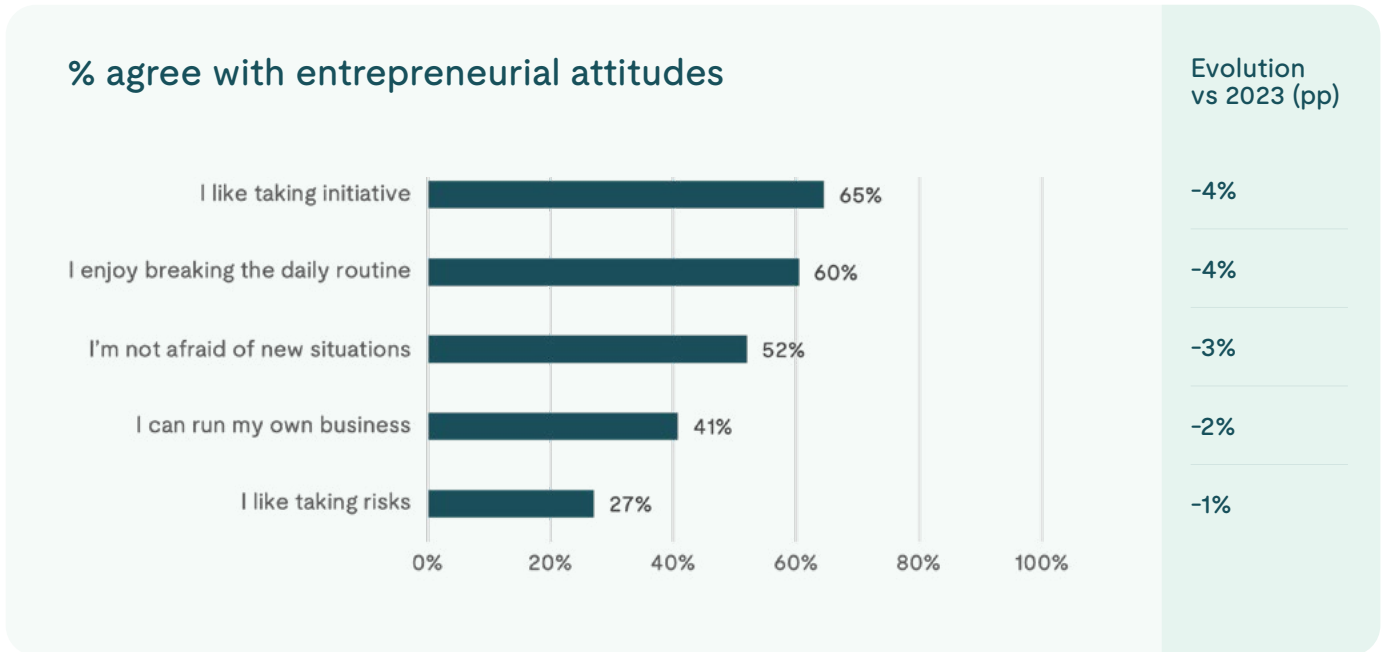
Is Belgium becoming anxious, risk-averse and turning inwards?

*agree or totally agree with statement



Societal attitudes

Is Belgium becoming anxious, risk-averse and turning inwards?



In a context of a society under pressure:

- ✓ Economic uncertainty (inflation, cost of living)
- ✓ Political instability (national and global)
- ✓ Global crises (climate, conflicts, migration debates)

The most significant changes in attitudes over the last three years of the TGM show developments in Belgium that seem to respond to these underlying trends, with:

- ✓ A decrease in risk-taking and entrepreneurial spirit
- ✓ A decline in “social” attitudes, contrasting with the hyper-presence of social media
- ✓ An increase in conservative values
- ✓ An increase in individualistic behaviour

Consumption trends

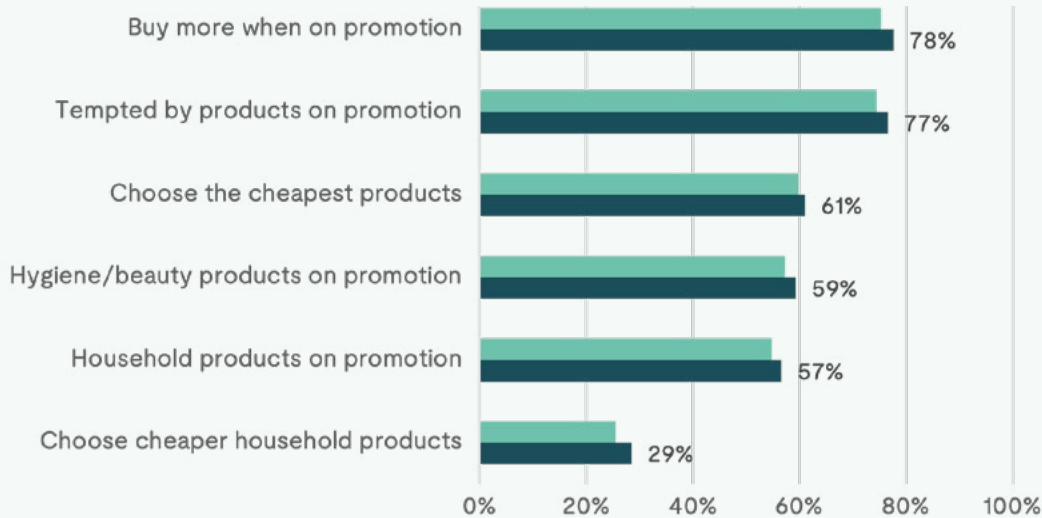
How Belgians eat, drink & think
about their health

Shopping paradox

In the context of economic pressure, Belgians are seemingly more price sensitive, and yet prefer quality and local products more than ever

2023 2025

% Belgians that agree with statements on promotion



Evolution vs 2023 (pp)

+2%

+2%

+1%

+2%

+2%

+3%

% Belgians that agree with statements of quality



Evolution vs 2023 (pp)

+1%

+1%

+1%

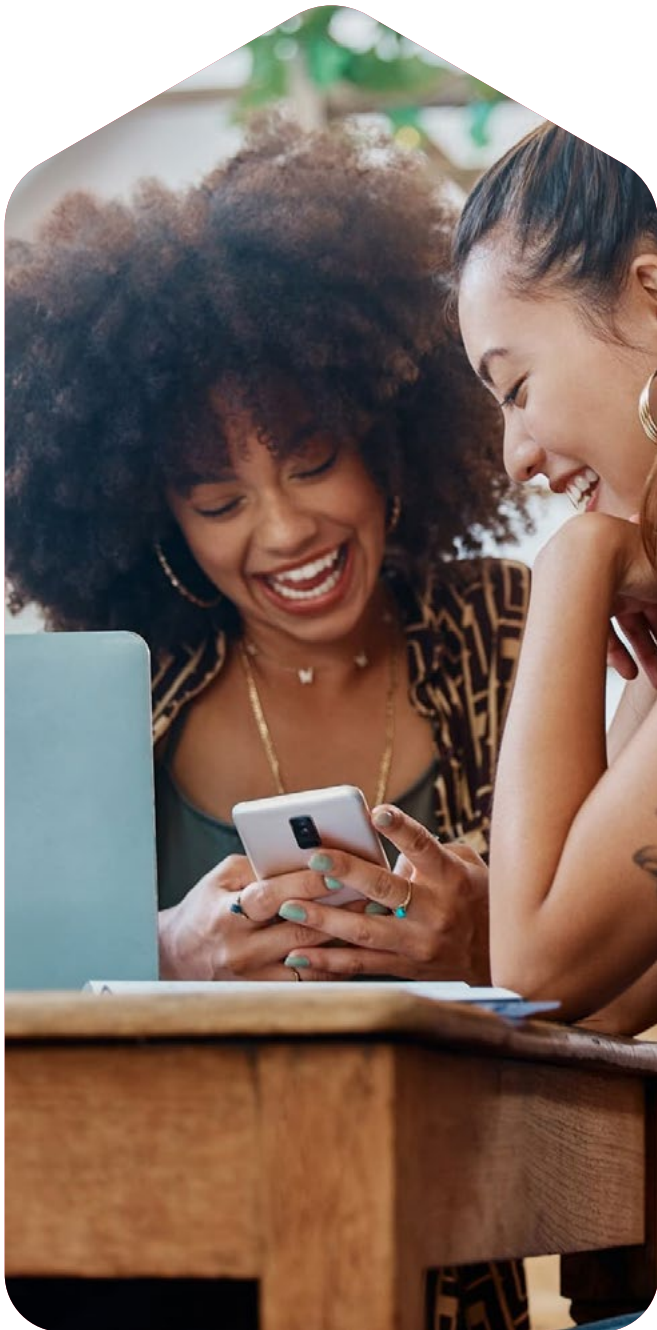
+2%

+1%

+1%

Several hypotheses:

- ✓ Gap between attitudes and behaviour: Quality awareness may be rising, but price sensitivity still pushes consumers toward cheaper options.
- ✓ Erosion of the middle segment: Higher-income consumers increasingly opt for premium quality, while a growing group actively hunts for promotions. Analysis on target groups might provide more nuance.
- ✓ Category-specific trade-offs: Consumers may be becoming more selective, choosing quality in some categories and quantity in others.

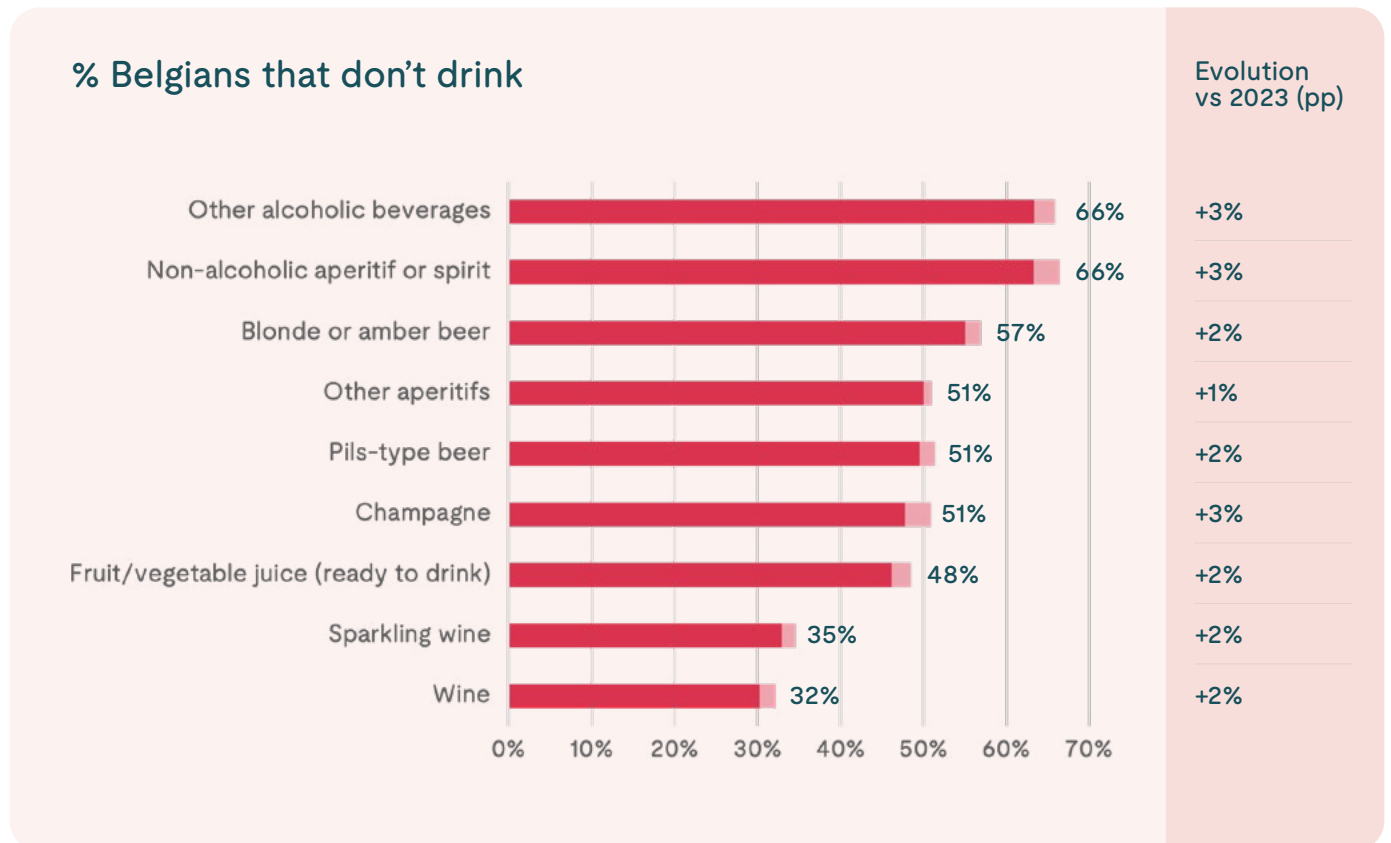


Health trend: alcohol on the decline?

Are Belgians drinking more health consciously?

Alongside broader trends such as a growing focus on quality and increased promo-hunting, Belgians are also showing clear signs of a stronger health orientation.

■ 2023 ■ New 2025



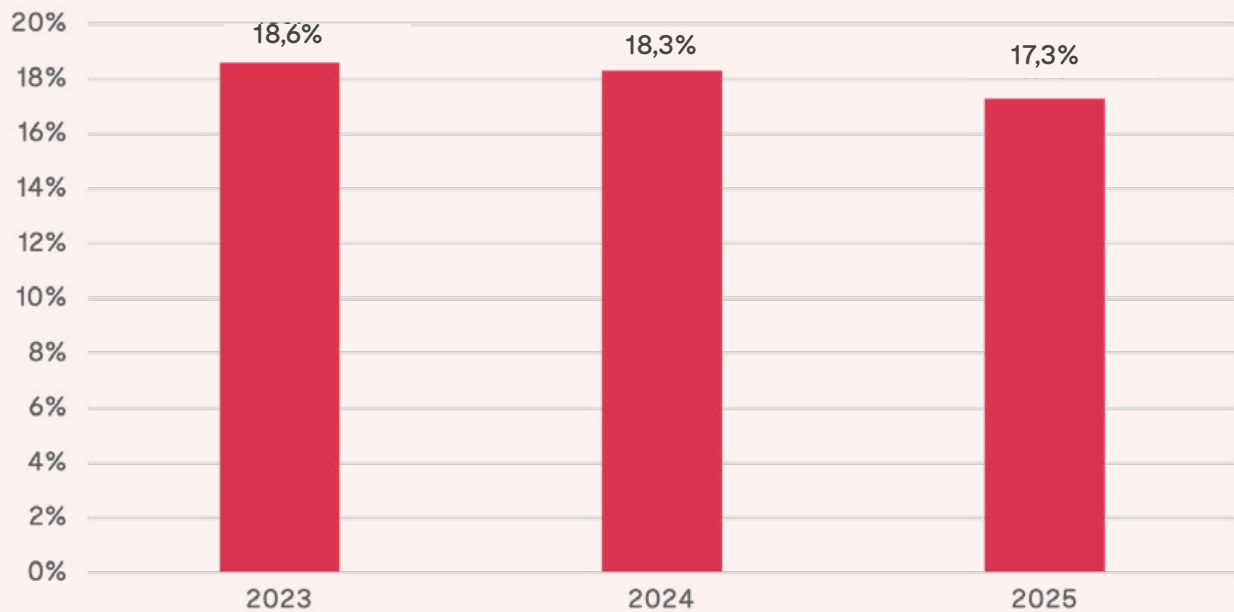
Alcohol consumption is declining across the board:

- ✓ Every single alcoholic beverage category shows increasing “never drank” rates
- ✓ Traditional drinks hit hardest: Champagne +3pp, Pils +2pp, Beer +2pp

Smoking

Another healthy evolution

% of Belgians that smoke



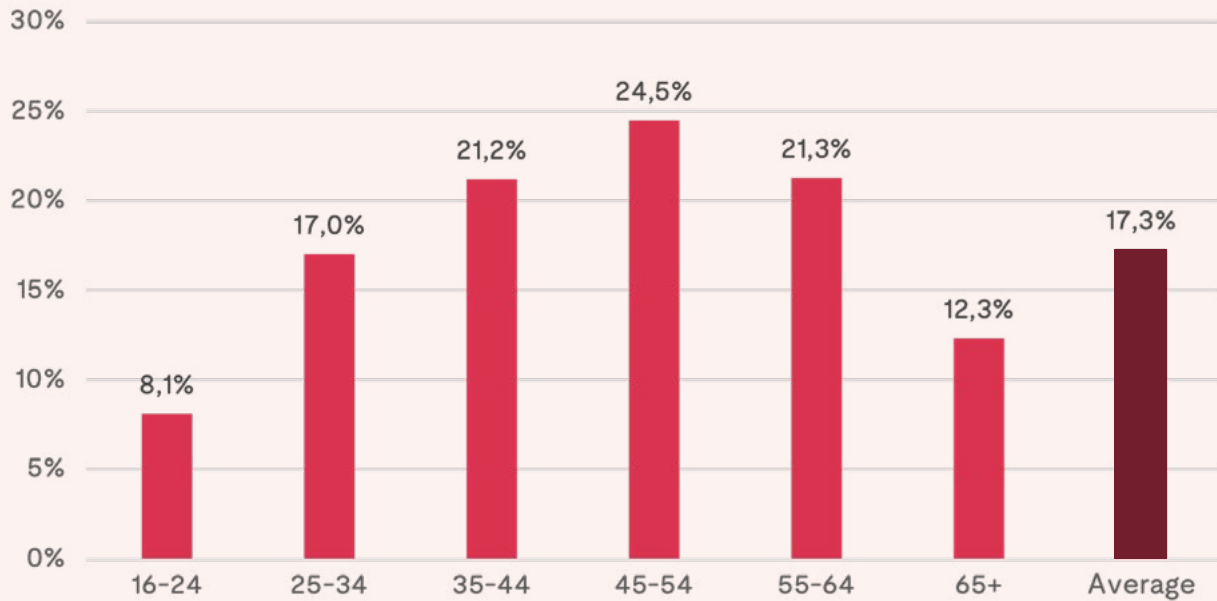
Smoking is also declining:

- ✓ 18,6% → 17,3% in two years
- ✓ Alongside alcohol moderation, confirms broader health trend

Smoking

Another healthy evolution

% of Belgians that smoke



But HOW it's declining is interesting:

Young Belgians have essentially rejected smoking (tobacco) before they start.

Smoking isn't declining through mass quitting, but thanks to young people never starting.

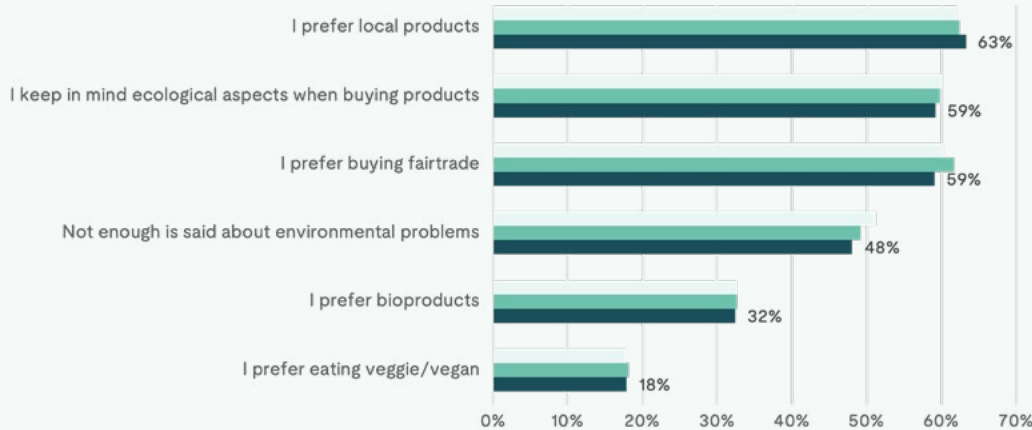
- ✓ 16-24 year olds: 8,1% smoke
- ✓ 45-54 year olds: 24,5% smoke
- ✓ 3x difference between generations

Bio/Sustainable food

Despite a growing focus on health/local/conscious consuming, opinions on sustainable consumption seem relatively stable, or are even decreasing.

2023 2024 2025

% Belgians that agree with the following statements



Evolution vs 2023 (pp)

+1%
-1%
-1%
-3%
0%
0%

Economic trends

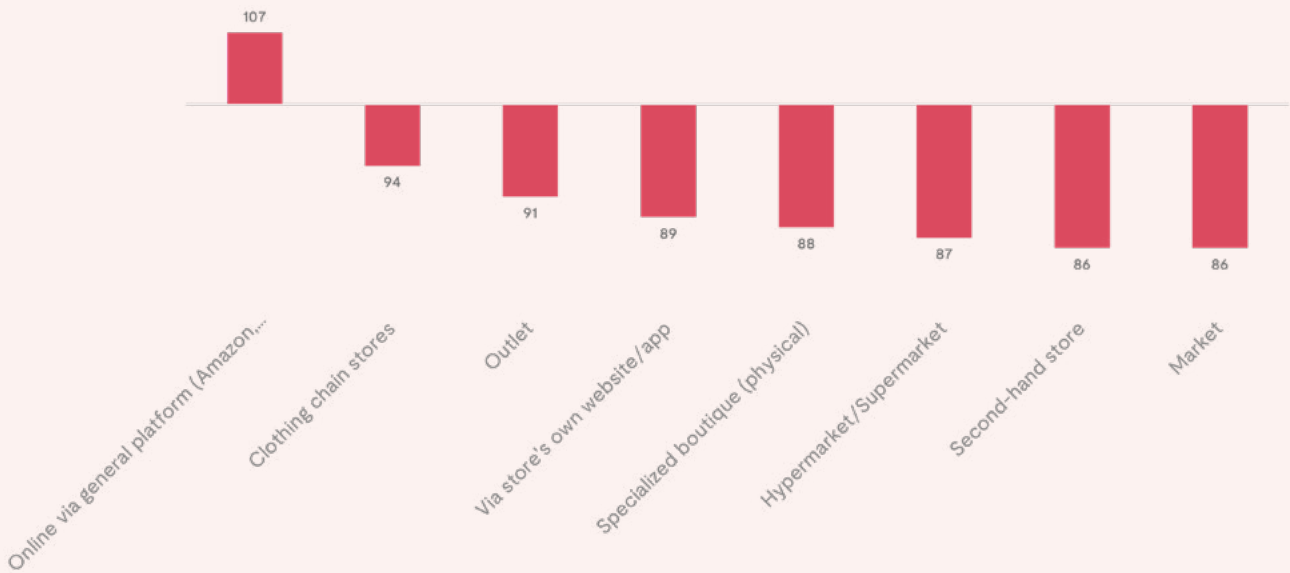
Towards the platform
monopoly?

Shopping modalities

E-commerce platforms are absorbing everything, except food

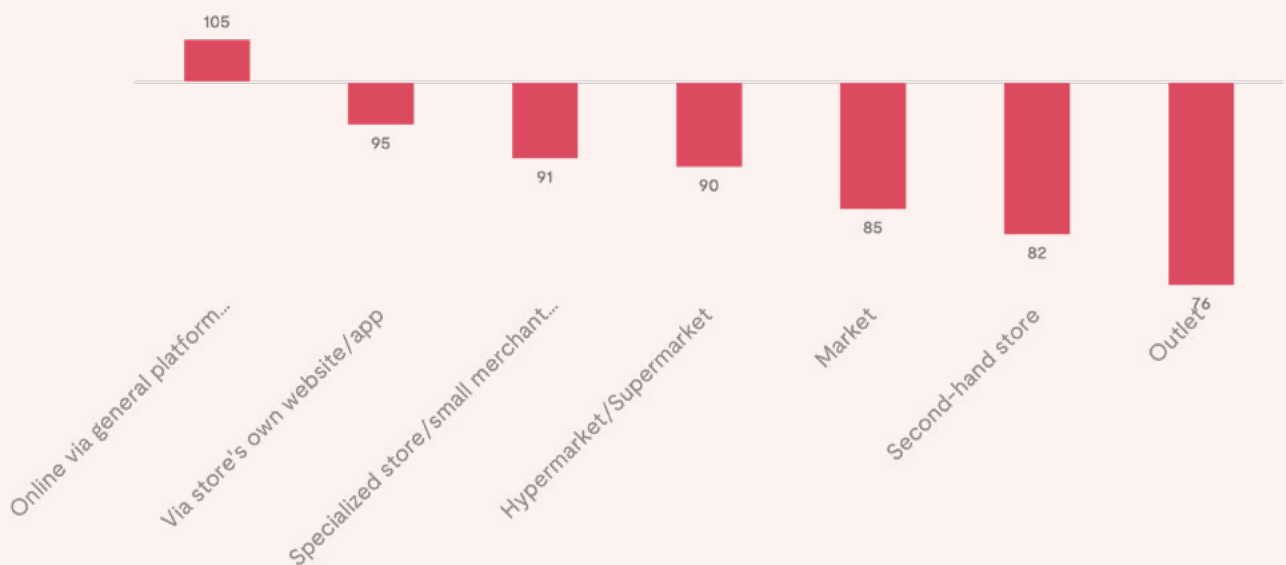
Location to buy clothes

Index* vs 2023



Location of other shopping

Index* vs 2023



*Index is an average of all product types people declared buying in a certain POS (2025 vs 2023)

Platform dominance is absolute:

- ✓ E-commerce platforms (Amazon, Zalando) are the ONLY growing shopping channel
- ✓ Every single other channel is declining – physical and digital
- ✓ Even digital alternatives are losing
- ✓ Both clothing and other shopping

What's remarkable about what's declining:

Second-hand stores (-14% to -18%)

- ✓ Recall: 63% say they prefer local products
- ✓ Recall: 59% say they consider ecological aspects
- ✓ Second-hand = sustainable shopping but it's declining FASTER than most channels
- ✓ Perhaps a distribution towards online platforms (Vinted?)

Another intention-behavior gap

- ✓ Same with Markets, local products, but declining

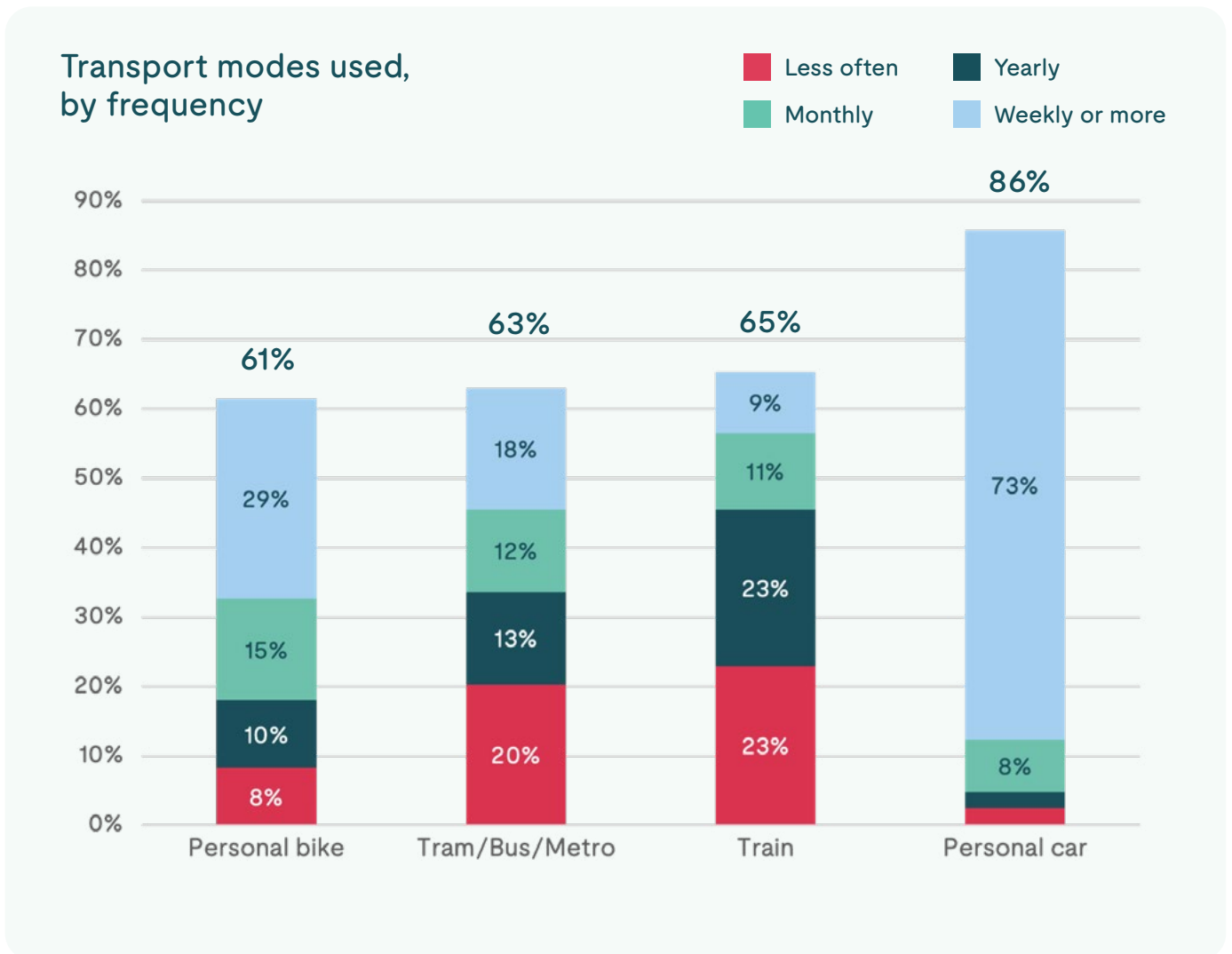


Mobility trends

A selection of three stories

Personal transport

Car remains king, but bicyclists love their wheels



Car dominance is overwhelming:

- ✓ 73% use cars weekly or more – Belgium’s default mobility solution
- ✓ Only 14% never use a car (lowest abstention rate)

Public transport = the flexible option:

- ✓ Most distributed usage across frequencies

The bike paradox:

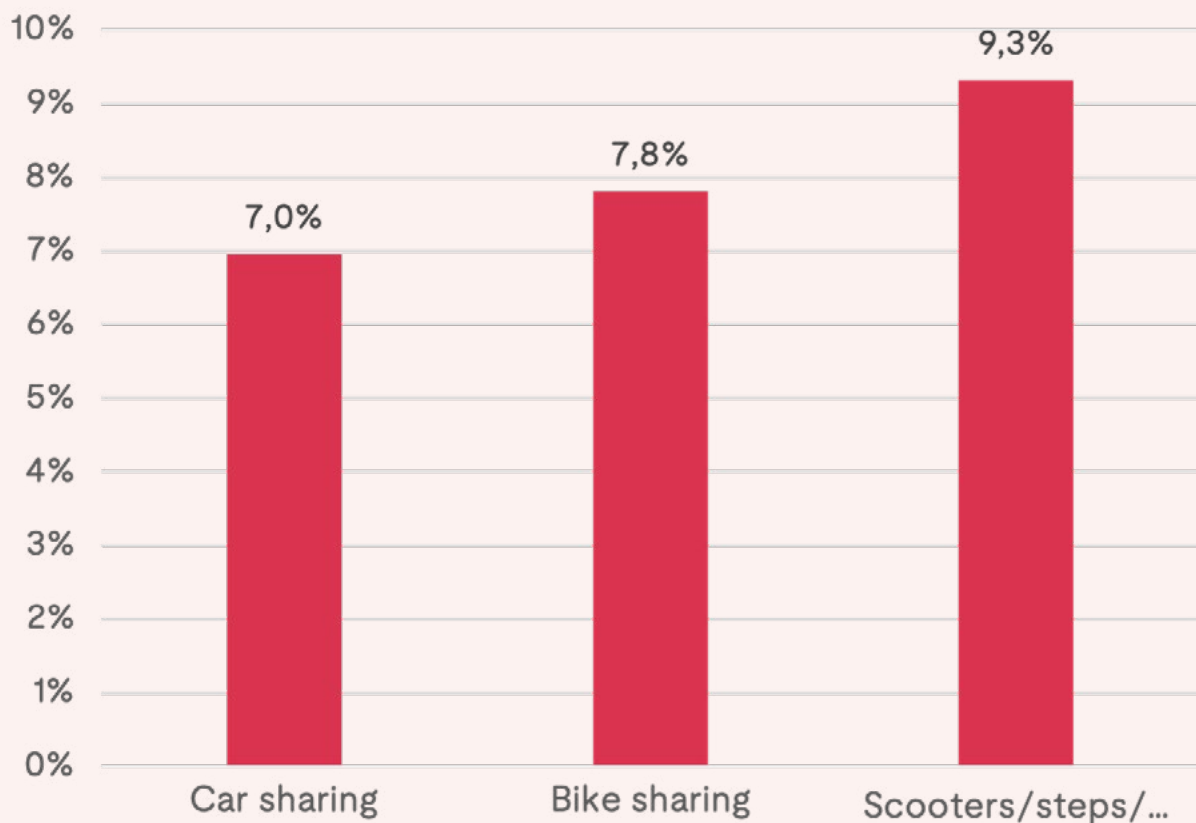
- ✓ 39% never bike (highest abstention rate of any mode)
- ✓ BUT 29% of all Belgians ride weekly+
- ✓ Bikes show the most polarized usage – you either bike regularly or not at all

Shared mobility

The future of mobility for the young and trendy?

Shared mobility found early adopters (young, urban) but hasn't achieved mainstream adoption.

% Belgians using shared mobility

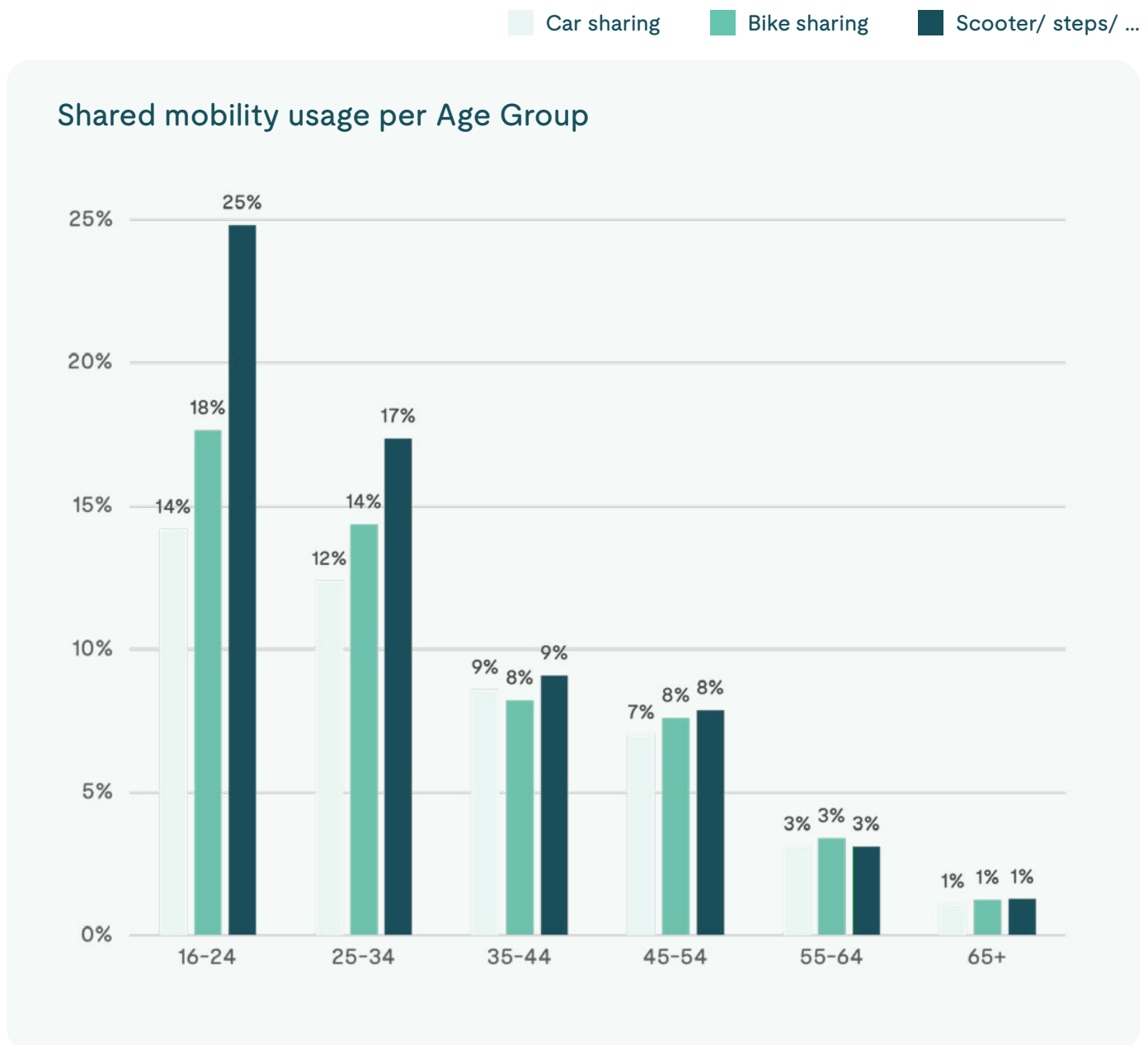


Reality check: Over 90% of Belgians NEVER use shared transport of any kind.

Shared mobility

The future of mobility for the young and trendy?

Shared mobility found early adopters (young, urban) but hasn't achieved mainstream adoption.



But, a core of early adopters exist in younger demographics

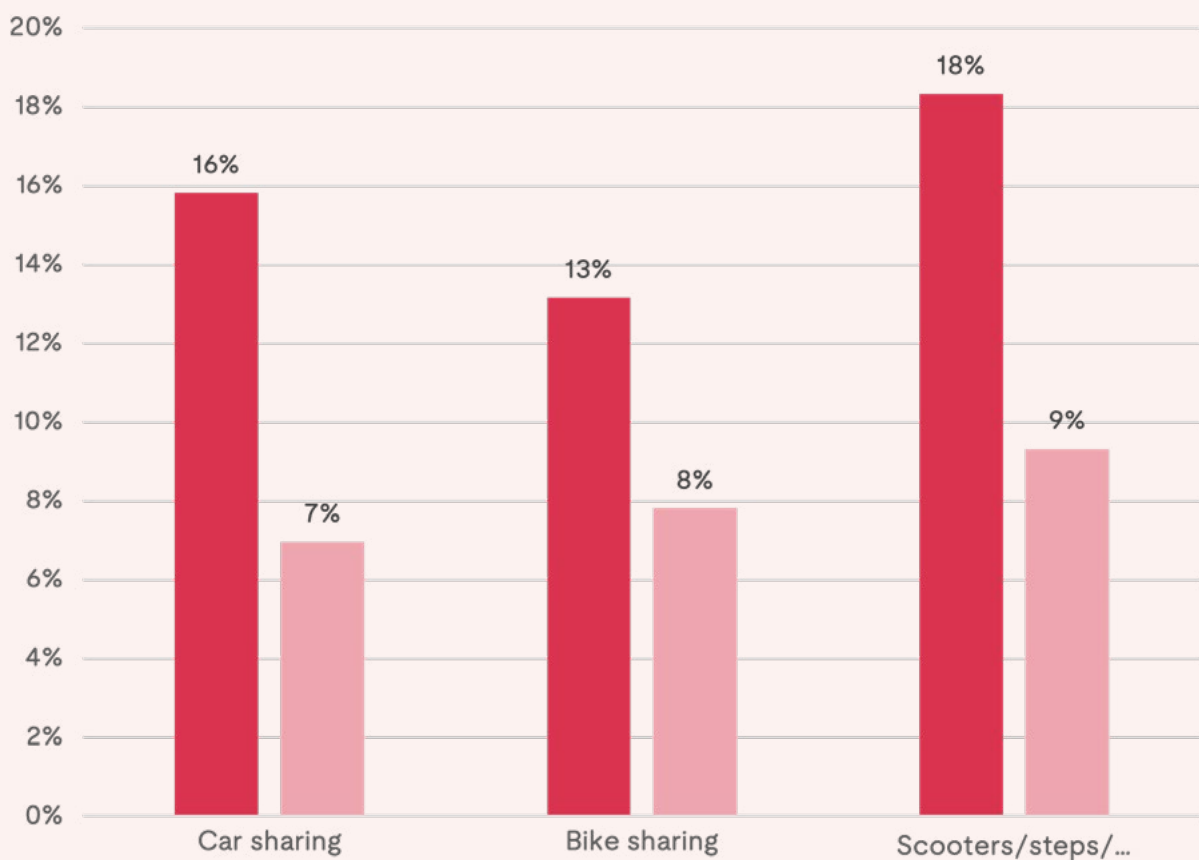
Shared mobility

The future of mobility for the young and trendy?

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■ Brussels 19 ■ Average

Shared mobility in Brussels



And, more popular within cities
(for example Brussels)

Key Takeaways

Conclusion

Key Takeaways

- ✓ Belgian society shows defensive reflexes toward external pressures, with a rise in individualism, conservatism and material focus.
- ✓ Consumption trends show contrasting evolutions:
 - Increase in price sensitivity (promo hunting)
 - Increase in quality sensitivity (local, high-quality ingredients,...)
 - Sustainability attitudes stay high, but everyday ecological behaviour is under pressure.
- ✓ At the same time, a clear shift toward more mindful and healthier consumption is visible:
 - Declining alcohol consumption
 - Declining smoking prevalence
- ✓ Local shopping declines, while international e-commerce continues to grow remarkably, this contrasts with the strong declared preference for local products.
- ✓ Mobility patterns remain stable: car use stays dominant, while shared mobility remains niche.





Colofon

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VORMGEVING EN PRODUCTIE
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