



Belgium
at heart

R | Rossel
Advertising

Belgians and the
Made in Belgium

Why conduct *Belgium at heart?*

Armed conflicts,
economic upheavals, inflation



Consumers losing
their bearings



What impact on local consumption?
How can brands effectively communicate their local roots?

METHODOLOGY

A comprehensive vision: consumers and companies

B2C STUDY

TYPE OF SURVEY
CAWI



SAMPLE
N=2000



TARGET
Belgians aged 18+



FIELDWORK
23/06 – 11/07/2025



B2B STUDY

TYPE OF SURVEY
Hybrid CAWI = CATI

SAMPLE
N=77

TARGET
Companies active in Belgium

FIELDWORK
31/07 – 22/09/2025

An impressive wealth of information

**31 questions B2C
250 items**

**National
representativeness**

**Socio-demographic
criteria**

**24 questions B2B
190 items**

**Mirror
analysis**

**Diversity
of behaviors**

**Sectors
insights**

**Exclusive
insights**

Personae

**Large
scope**

Made in Belgium, a choice from the heart

Geographic origin is an important selection criterion for Belgian consumers.

Local products are systematically preferred and often chosen.

Consumers are willing to **pay more for Made in Belgium**.
Proximity outweighs price considerations.

Choosing local: a responsible, civic-minded & solidarity-based act



Some
Key
Insights



International tensions directly influence Belgian consumption to the advantage of local products

Some
Key
Insights

Up to 70% are in favor of **boycotting** products from sensitive regions



When given the choice, **84%** of Belgians opt for a **Belgian product** rather than a foreign one

Key findings



Barriers to local purchases

Gap 1

Lack of transparency

60% of consumers have difficulty to identify origin!

Gap 2

Deficit of awareness

63% cannot spontaneously associate a brand with the label "local product."

Gap 3

Purchase obstacles

88% perceive barriers mainly price too high, limited offer & lack of availability

Many opportunities for local brands

Key findings

Most convincing arguments in advertising messages



***Made in Belgium*, activation driver**

Key findings

Belgian media, relevant and credible ambassadors

Level of trust

Belgian media 78%!

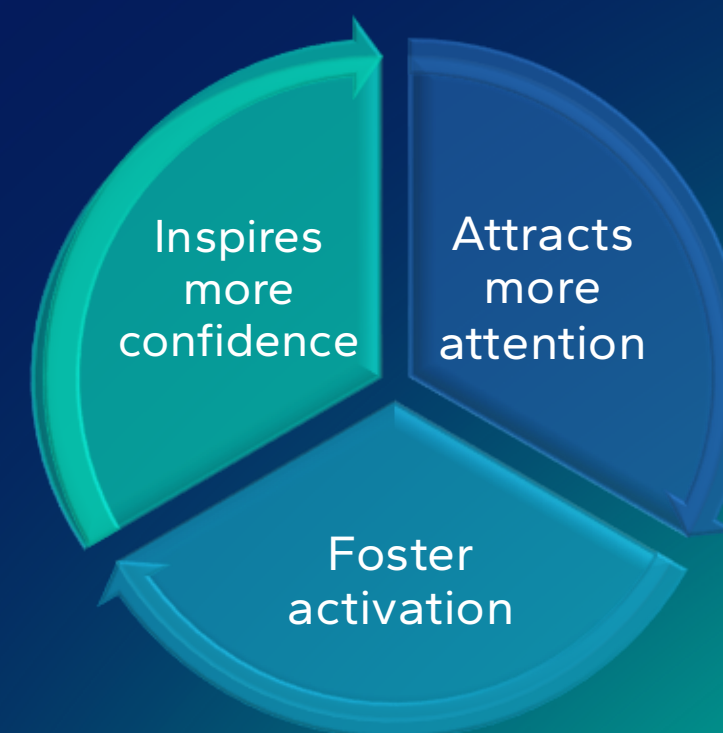


Social networks 32%

Belgian media:

An unequaled trust capital

62% of Belgians react **very positively** when they see an ad for a **Belgian product** in **Belgian media!**



Key findings

A plural Belgium

> Each profile has its own expectations motivating their preference for local

Added value for sustainability

Gen Z



Emotion, values & identity



Prioritizing price and convenience

Gen Y



Pragmatism & transparency

Baby-boomers



Local as a solution

**Key
findings**

Lack of tailored communication

59% of advertisers
*highlight proximity
more* in their
communication



BUT...

58% do not adapt their
messaging to local
specificities!

Belgium at heart

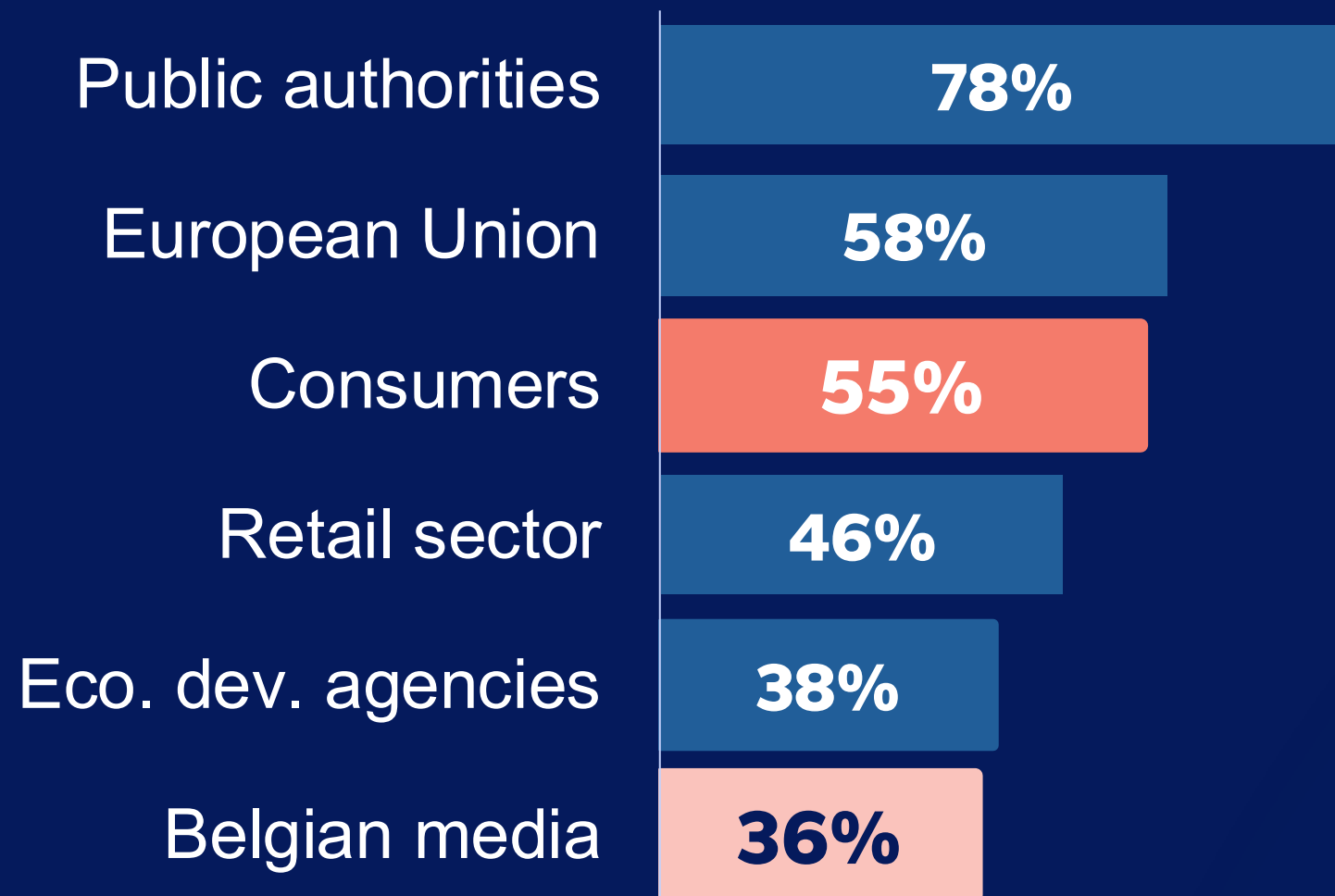
a tool that helps brands
adapt their communication

Key findings

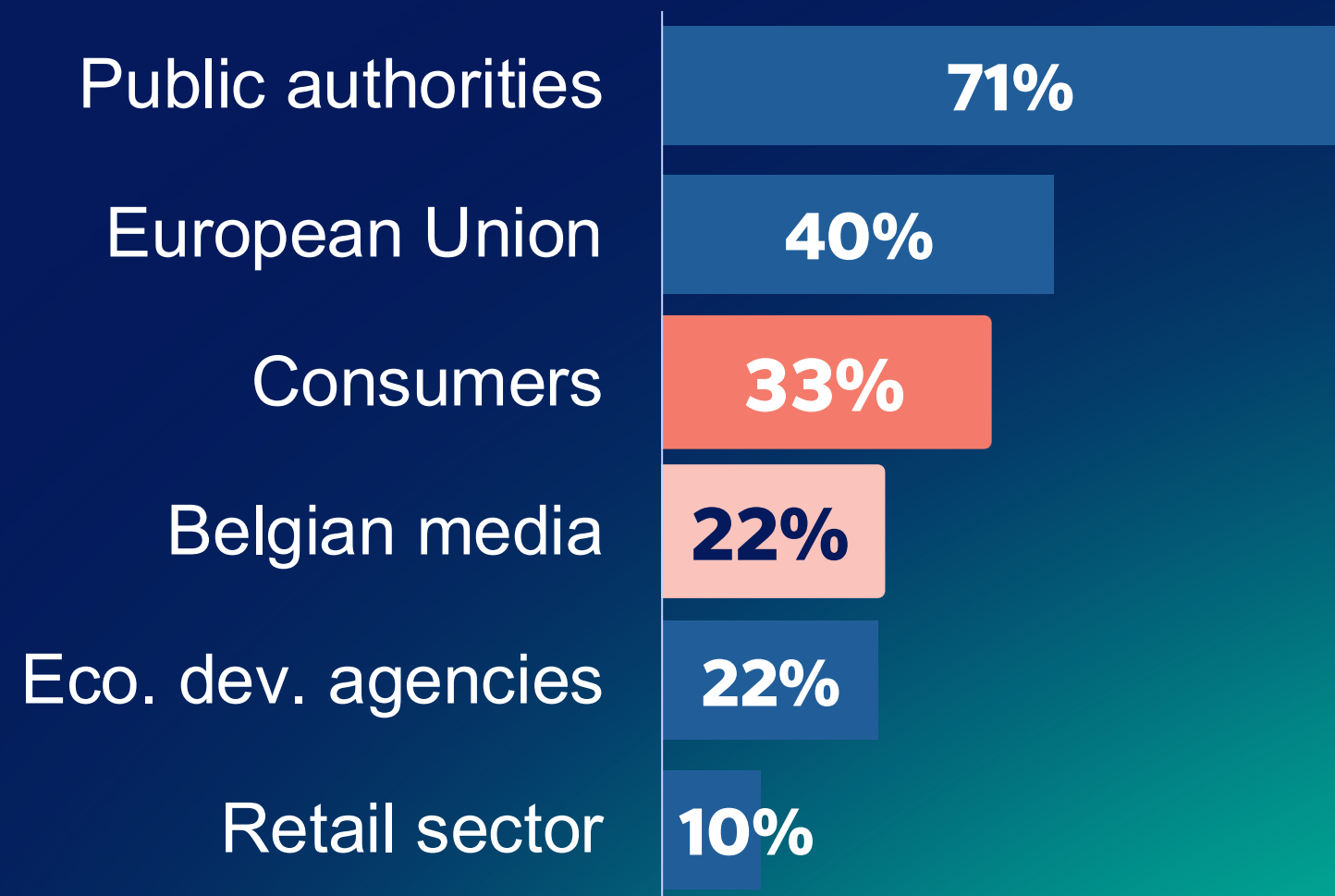
Mirror analysis - divergences

Which actors should support Belgian businesses in times of crisis?

According to
Belgian **CONSUMERS**



According to
COMPANIES active in Belgium



> Underestimation of real engagement for local and of the role of Belgian media

Leadgen' strategy



A pillar for the *Belgium at heart* label

Building on the study,
Rossel launched the *Belgium at heart*
initiative
to support and promote national
and regional advertisers committed
to the Belgian economy.



Why do *Belgium at heart* deserve an Amma ?



An illuminating compass
in these times of crisis,

Strategic study useful
& usable by all

Targeted communication
support tool

Successful
LeadGen strategy



Belgium
at heart

Belgians and the *Made in Belgium*