

# COVID-19 LIVING IN THE NEW NORMAL

## WEEK 7

29/04/20

Brussels



# HAVAS TALKS



*Et une de plus!*

*Une nouvelle édition remplie d'analyses, de déductions, d'observations et parfois... d'interrogations.*

*Bien entendu, ces éditions n'existeraient pas sans l'inspiration. L'inspiration inspirée par la curiosité.*

*Et celle-ci ces derniers temps trouvent de quoi se rassasier. Au travers de la presse pro, des informations de nos partenaires travaillant en régie, en bureau d'étude ou au sein des fédérations des médias. Grâce aux sites d'information, mais aussi... et il faut bien se l'avouer, en s'inspirant du travail de nos concullègues d'autres agences média. On aurait tort de se priver!*

*Quelle belle image de cerveaux en ébullition qui partagent et qui se complètent.*

*En parlant de cerveaux, j'ai l'honneur de partager l'affiche avec mes collègues qui constitue ma petite rédaction à moi. Faites-leur bon accueil!*

Vanessa Sanctorum, Strategy Director – Havas Media Belgium



*Félicitons-nous !*

*Une chose qu'on ne fait jamais assez. Car en cette période trouble, nous avons tous fait preuve de la plus grande agilité. Sans coach ni expert pour nous inciter à l'être. Cela devait se faire.*

*Quelle que soit notre organisation, où que nous soyons, félicitons-nous pour notre persévérance et résilience à poursuivre nos activités dans ces nouvelles circonstances.*

*Cette newsletter en est une des incarnations. Elle est le fruit d'un travail d'équipe réalisé malgré les difficultés de l'éloignement. Par l'écho qu'elle donne aux initiatives prises en ces temps de crise et aux informations fournies par de nombreux acteurs de tous secteurs, elle atteste aussi de notre agilité collective.*

*Alors, félicitons-nous et continuons de nous unir, de partager, de nous informer.*

*Bonne dégustation de cette nouvelle édition !*

Flore Dargent, Insights Analyst – Havas Media Belgium



# HAVAS TALKS

“



**Learn from (and during) the crisis to make your brand the better version of itself! #selfcare**

*Communicating during times of crisis has always been touchy for reputation and brand safety. But it doesn't mean companies should stop communicate, it just means that the usual communication needs relevant adjustments. To me, brands are like people when it comes to crisis communication. So, ask yourself what kind of person would be your brand? Someone who'd empathize, I'm sure!*

*Your communication remains safe as long as the approach is human-centered. Try to understand the major consequences of the crisis on your consumers in order to provide them real short-term solutions.*

*Here are the points where I think brands can and should make a difference:*

- ✓ **Show support** and **provide real help** to the health sector and/or to your consumer (whether it's physical or psychological help).  
*How could you create (with your existing resources) a new USP that would benefit the population during this crisis?*
- ✓ Endorse an **informative and educative role** in order to keep your consumers/partners up to date on how to cope with the crisis.
- ✓ Optimize **convenience**: everybody's stuck at home, including your employees. How can you make the processes smoother internally and externally? Simple solutions already exist or could be created. Think digital, think small actions with big impacts.
- ✓ **Stay creative**: reconsider your media investments, your platforms and how you usually function. It is the right time to bring new ideas on the table and produce new forms of contents and synergies. We're all home so think about what would entertain you, your family, your neighbors, your friends and then find a way to incorporate your brand in these ideas.

*We have been showcasing many examples of "Brand Optimism" these past weeks and this is to me what it's all about: communicating with optimism. Think of your brand as a real person with empathy and the will of helping. Keep it human!*

Alix Joiret, Insights Analyst – Havas Media Belgium

”



# EXPERTS OPINIONS



## “ **The role of creativity**

*Creativity can bring meaning to a consumption that will be more sustainable and reasoned but also relevant. It is through meaning and creativity that we need to reconnect with our stakeholders*

”

Stephan Salberter, General Director (LN24) – MM



## “ **Local streaming initiative**

*The Corona crisis has accelerated the structural decline in advertising revenues. (In this case) Placing a local streaming alternative for Netflix on the Flemish market is certainly a good thing for our media landscape. But local streaming platforms face the enormous challenge of competing with wealthy multinationals offering their nearly endless catalog of high-quality programs at bargain prices*

”

Tom Evens, Professor in Media Industries (imec-mict-UGent) – PUB



# CONTENT

## CONTEXT

1

### FROM LOCKDOWN TO EXIT

an overview of the major events & announcements

## H/COMMERCE

2

### BELGIAN CONSUMER SENTIMENT:

behavior & buying attitudes during Covid-19  
with a focus on multimedia & appliance stores

## #BRANDOPTIMISM

8

### OPTIMISM FOR OURSELVES & OUR BRANDS

in the spotlight: D&L, Thalys, BNP Paribas  
Fortis, Carrefour

## WEB & SOCIAL

3

### HYPERLOCAL & DEDICATED

the EXIT strategy revives the attention of press & audiences.  
Thematics and twitch.tv in the spotlight

## TV

4

### NEWS STILL PEAKS

daily news consumption is stable but federal announcements  
still score. Infotainment & social TV still dominate

## RADIO

5

### RADIO LISTENING JUST BEFORE COVID-19

the new radio audience measurement survey results are  
available (CIM RAM)

## OOH

6

### THE NEXT VISUAL PLAYGROUND

the exit and expected shift to local travel this Summer create  
new opportunities for outdoor advertising

## SPONSORSHIP

7

### ALTERNATIVES NEEDED

with sport leagues and (major) competitions out, sponsorship  
has to reinvent the game





**FROM LOCKDOWN TO EXIT...**





# COVID-19 TIMELINE IN BELGIUM

Coronavirus : voici les 10 mesures prises par le fédéral pour aider les entreprises



Coronavirus : le gouverneur de Namur interdit les grands événements et les voyages scolaires



Coronavirus: la Belgique en confinement à partir de ce mercredi midi, avec quelles mesures?



Phase 2

Monday, March 9<sup>th</sup>

Regional measures

Wednesday, March 11<sup>th</sup>

Belgium hands powers to caretaker government

Coronavirus pandemic sparks new debate on the ongoing federal government formation

Monday, March 16<sup>th</sup>

Prime Minister announces the **extension of the measures concerning social distancing for 2 weeks**

Friday, March 27<sup>th</sup>

Friday, March 6<sup>th</sup>

**10 federal actions to help businesses**

Coronavirus : la Belgique entre en "phase 2 renforcée"



Tuesday, March 10<sup>th</sup>

**Prohibited groupings**

Thursday, March 12<sup>th</sup>

**Phase 2 re-inforced in BE**

Belgian government orders the closure of schools, horeca (except for delivery) & the cancellation of public gatherings

Bruxelles, Wallonie, Flandre : voici les mesures prises pour endiguer l'épidémie de coronavirus



**Le Palais charge Wilmès de former un gouvernement avec comme seule mission la lutte contre le coronavirus**

Il ressort, dans le rapport final des missionnaires que « le gouvernement démissionnaire dispose d'un soutien suffisant au parlement lui permettant de poursuivre la gestion des problèmes urgents. »



Tuesday, March 17<sup>th</sup>

Prime Minister imposes stricter **social distancing through total lockdown measures** from noon the following day

**Pas de renforcement mais une prolongation du confinement en Belgique**



Wednesday, April 15<sup>th</sup>

Belgian government announces that **lockdown measures will continue until the 3<sup>rd</sup> of May**. Gardening and DIY shops can open and nursing home are allowed to organize visits





# ENDING THE LOCKDOWN IN FOUR PHASES

## PHASE 1A

## PHASE 2



- Industries and B2B services will open first



- Fabric businesses open to produce masks



- Masks become mandatory in public transports



- Schools open progressively (not all years concerned at the same time)



- Family & friends gatherings are allowed (max 10 people and during weekends)



- One day trips are allowed

Wednesday, April 15<sup>th</sup>

Belgian government announces that **lockdown measures will continue until the 3<sup>rd</sup> of May**. Gardening and DIY shops can open and nursing home are allowed to organize visits

Friday, April 24<sup>th</sup>

Belgian government announces that the **lockdown will slowly end in four different phases**. If each phase is successful, the following one can begin. Everything is subject to change regarding how the health crisis situation evolves.

Pas de retrouvailles avant le 18 mai: le risque d'une perte d'adhésion aux mesures de confinement



Monday,  
May 4<sup>th</sup>

Monday,  
May 11<sup>th</sup>

## PHASE 1B

Shops/businesses open except for Horeca (restaurants, bars, etc.)



Monday,  
May 18<sup>th</sup>

Monday,  
June 8<sup>th</sup>

## PHASE 3



- HORECA could open if the previous phases are successful
- Collective sports are allowed under certain conditions



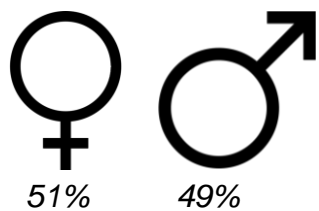
A photograph of a multi-level shopping mall interior. The mall features green-painted structural pillars and railings. Various retail stores are visible on different levels, including 'Etam' and 'H&M'. The ground floor has a 'Totum DIENST' kiosk. People are seen walking and shopping. The text 'BELGIAN CONSUMER SENTIMENT' is overlaid in large, bold, black letters.

# BELGIAN CONSUMER SENTIMENT

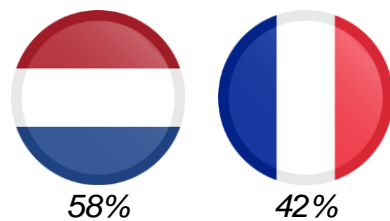
purchase behavior & buying attitudes during Covid-19



## Gender



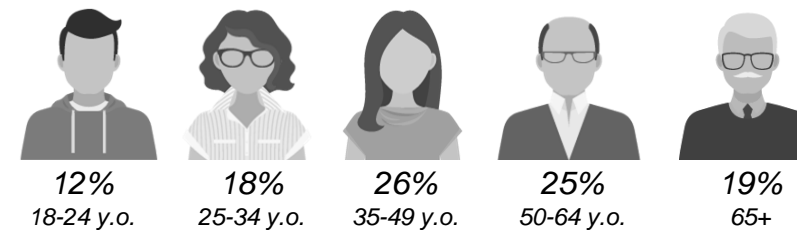
## Language



## Prof. active



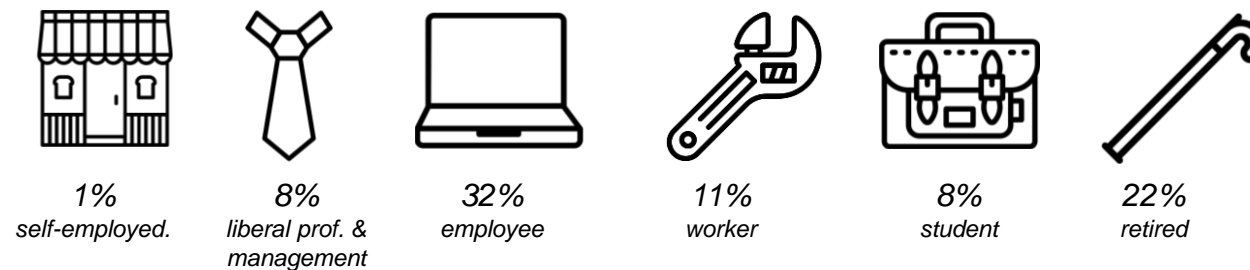
## Age



## Region



## Professional situation





# BASIC NEEDS DURING CONFINEMENT? MEDIA! (WITH FULL BELLY IN A TIDY HOUSE)

1



**67%** surfing on the internet

2



**55%** cleaning/tidying the house

3



**55%** watching TV w/family

4



**52%** cooking

5



**44%** watching videos & movies



# SURFING IS THE N°1 ACTIVITY ACROSS ALL GENERATIONS

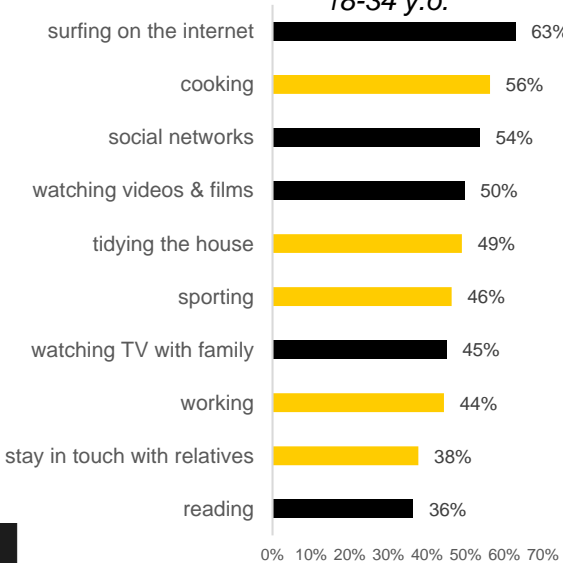
1

## DIGITAL ACTIVITIES DOMINATE THE MEDIA DIET OF GEN Z...

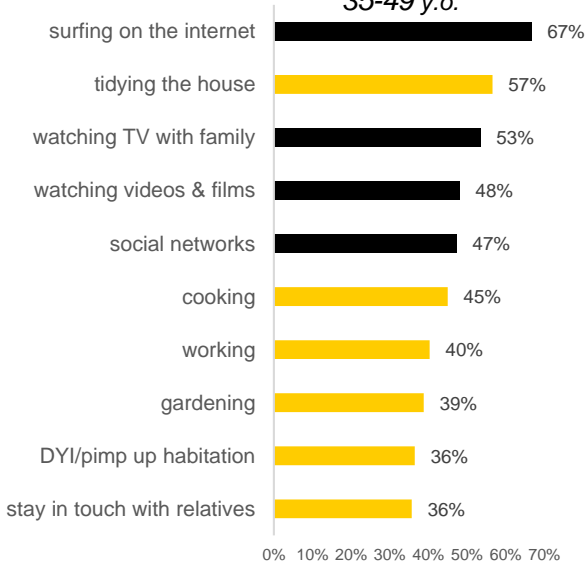
Audiovisual, meaning not only TV, and digital media dominate the TOP 5 (main) activities of young adults and Gen X'ers during the lockdown. Age groups with a higher density of kids between 6 and 15 y.o. tend to watch TV with family members more than younger age groups without or with younger kids



18-34 y.o.



35-49 y.o.



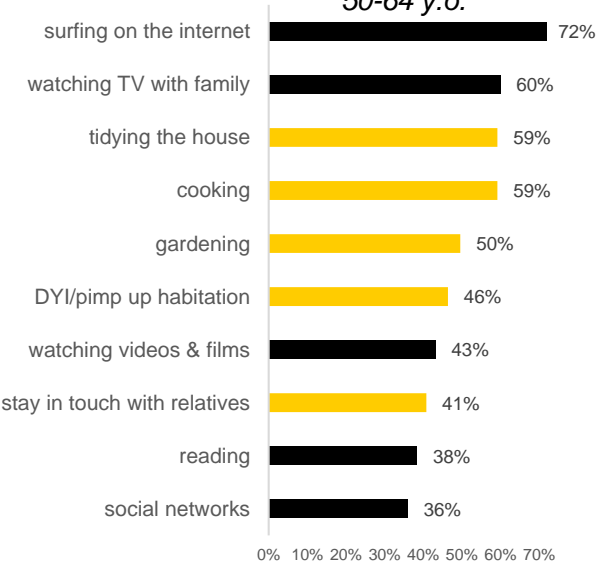
2

## AND THE INTERNET THE DAILY LIFE OF BOOMERS

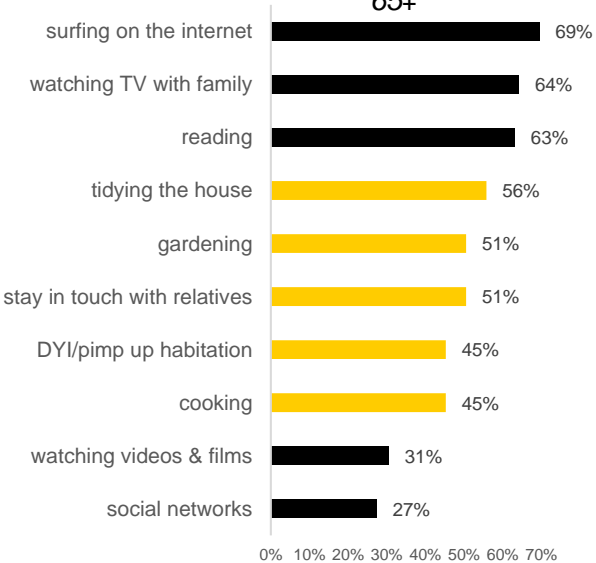
50+ers have been taken care of their home: Spring cleaning, gardening, doing odd jobs have been part of their new everyday life. Only 21% of 50+ mentioned working as main activity (vs 33% of 50-64 y.o.). But don't neglect the importance of internet: 7 out of 10 50+ers mentions surfing on the internet as main activity



50-64 y.o.



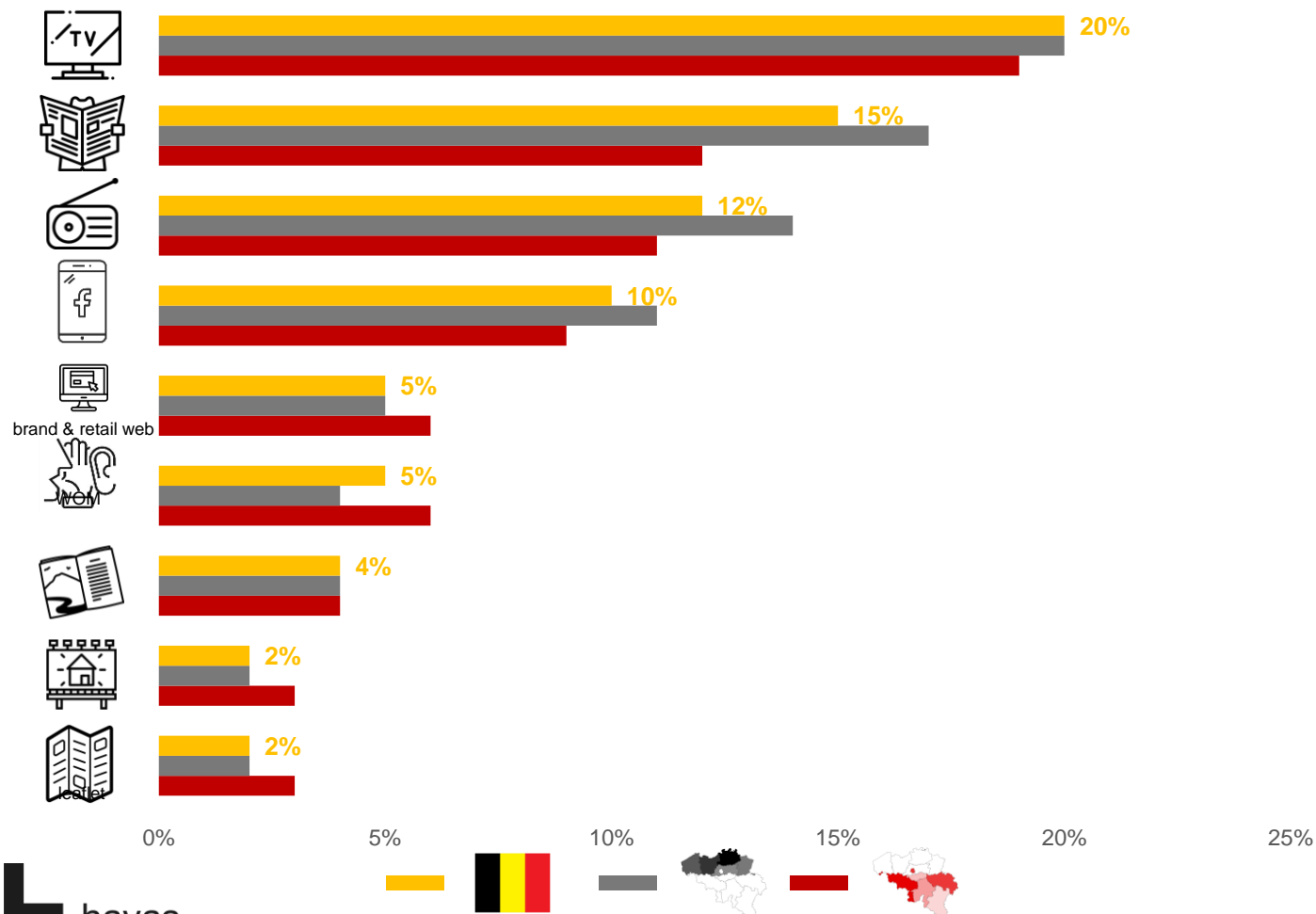
65+





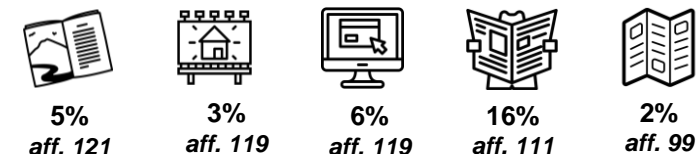
# TV, NEWSBRANDS AND RADIO ARE THE TOP 3 MEDIA OF INFORMATION

But every audience has its own information diet. Homeworkers are more into magazines (5%), brands & retail sites (6%) and newsbrands (16%). Partially unemployed listen more to radio (16%) and watch more TV 22%).

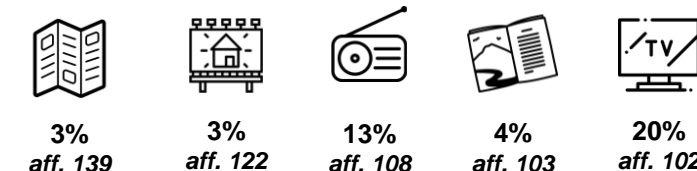
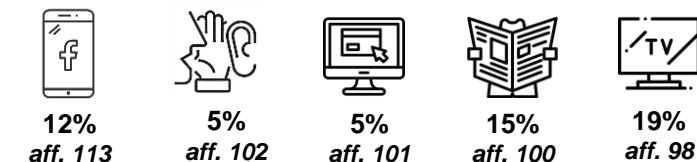
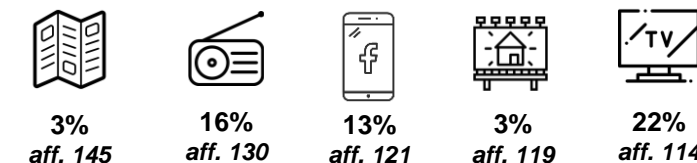


## TOP 5 (ranked on affinity)

### HOMEWORKING



### PARTIALLY UNEMPLOYED



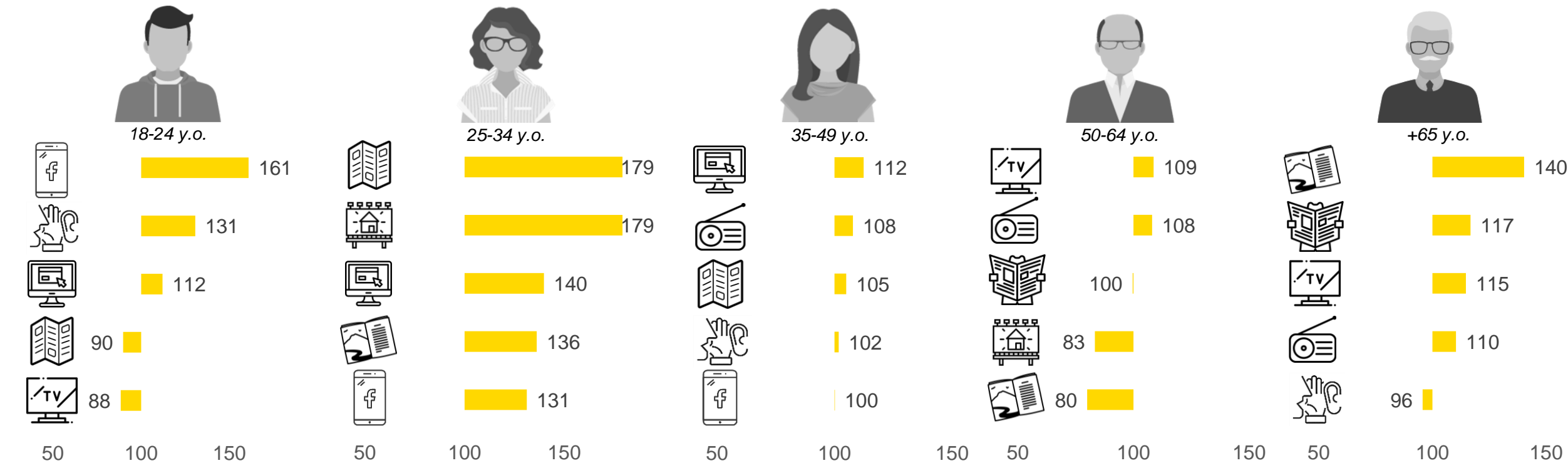
On a scale from 1 to 10, Which media did you use the most to keep you informed during the lockdown? (1-not used a lot; 10-used the most; scores 7-10 grouped)



# EVERY GENERATION HAS ITS PREFERRED MEDIA

Young adults tend to use social networks, word-of-mouth and brand & retail websites more than other age groups. Gen Yers mention leaflet and OOH more often. More usual suspects such as TV and radio have more influence on Gen Xers and younger Baby boomers. The senior age group relies more often on magazines.

TOP 5 most used media (ranked on affinity index)





# CONSUMPTION OF CULTURAL GOODS ROCKETED AMONGST YOUNG ADULTS

## OTHER AGE GROUPS ALREADY POSTPONED CULTURAL PURCHASES

1 OUT OF 4 YOUNG ADULTS BUY MORE CULTURAL PRODUCTS

**1 14%** of respondents are buying more books and cultural products. **Mostly adults younger than 35 y.o.** (24%). Only 10% of Baby boomers (55+) invest more in culture

1 OUT OF 5 YOUNG ADULTS BUY MORE VOD & STREAMING

**2 19%** of 18-34 y.o. Only 6% of respondents aged 35+ agree confinement have made the purchase of VOD films and streaming more favorable

FLEMISH POSTPONE CULTURAL PURCHASES

**2 60%** of respondents planning to buy CULTURAL products have postponed their purchase till after the confinement. Flemish people (70%) are more numerous



# LOCKDOWN FREEZES SPENDING IN CULTURE & TECH

Intentionalists are massively postponing their purchases

## 1 OUT OF 10 MISS CULTURAL PRODUCTS



**10%** missed **cultural products** just after a few days of lockdown. Young adults (16%) more than active Baby boomers (7%). Women (12%) more than men (9%)

## BELGIANS ARE WELL EQUIPPED



**2%** missed **technological products** just after a few days of lockdown. Flemish people (3%) slightly more than French-speaking (2%), partially unemployed (3%) more than homeworkers (1%).

## 60% HAD BUYING INTENTION BEFORE LOCKDOWN



**60%** of these *intentionalists* postponed (nearly) every purchase regarding **cultural goods** or services. Homeworkers (63%) postponed more often than partially unemployed (49%)

## 54% HAD BUYING INTENTION BEFORE LOCKDOWN



**47%** of these *intentionalists* postponed (nearly) every purchase regarding **tech products**. There are no noticeable differences between the different targets surveyed. Not surprising as tech products have high entry prices



After a few days of lockdown, do you miss the following products or services? On a scale from 1 to 10, what purchases have you postponed pending the end of lockdown? (1-postponed nothing; 10-postponed every purchase scores 7-10 grouped)



# 1 OUT OF POSTPONE SPENDINGS TO « UPGRADE » HOME & COMFORT

Intentionalists are massively postponing their purchases

## HAPPY IN THE CURRENT CONFIGURATION

6%

missed **deco & furniture** just after a few days of lockdown. Young adults between 18 and 24 years old (10%) more than other age groups

## BELGIANS ARE WELL EQUIPPED

4%

missed **household appliances** products just after a few days of lockdown. People between 25 and 34 years old (8%) slightly more than other age groups

## 57% HAD BUYING INTENTION BEFORE LOCKDOWN

49%

of these *intentionalists* postponed (nearly) every purchase regarding **decoration**. Women (52%) postpone more often man ((47%)

## 55% HAD BUYING INTENTION BEFORE LOCKDOWN

47%

of these *intentionalists* postponed (nearly) every purchase regarding **household appliances**. *Intentionalists* within older age groups (50+) more than younger age groups

WELCOME



# BE ONLINE TO INSPIRE CUSTOMERS WHEN FINANCES & SITUATION RECOVERED

## MORE ONLINE SHOPPING

**1 41%** of respondents are purchasing more online since the confinement. More than **one out of two** is aged 18-34 y.o. (55%)

## YOUNG ADULTS SHIFT FROM PHYSICAL TO ONLINE

**2 33%** of 18-34 y.o. do agree confinement creates **favorable conditions to order online** for products purchased in store so far (against 19% for 35+)

## (nearly) 1 OUT OF 5 MEN VISITED A NEW E-TECH SITE

15% of respondents surveyed visited a new e-commerce site related to **tech products** during lockdown. 1 out of 4 respondents aged between 18 and 34 y.o.



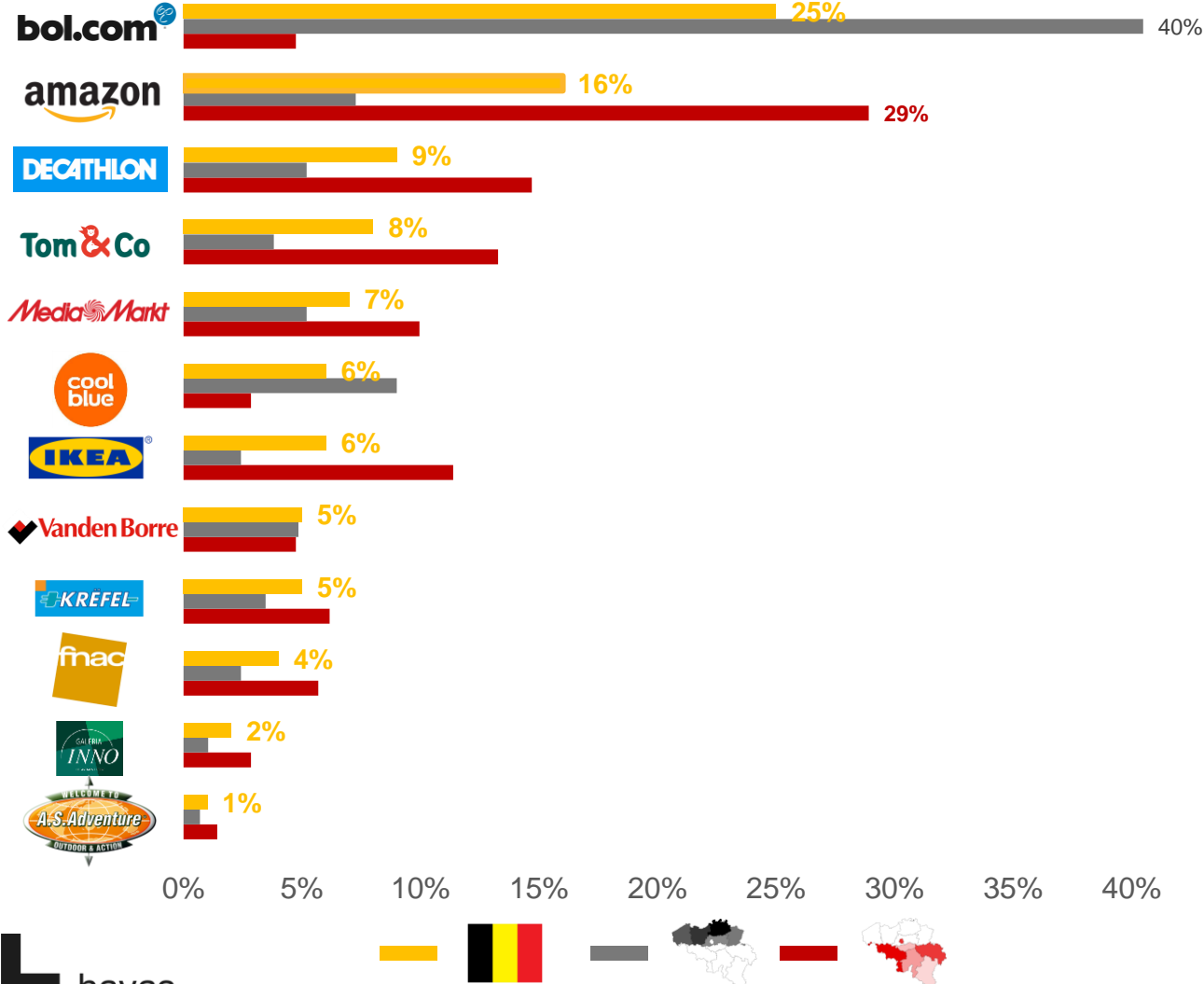
*How does this situation changed your buying behavior? You do/use more... (Yes) How does this COVID19 situation change your buying behavior? You do ...*



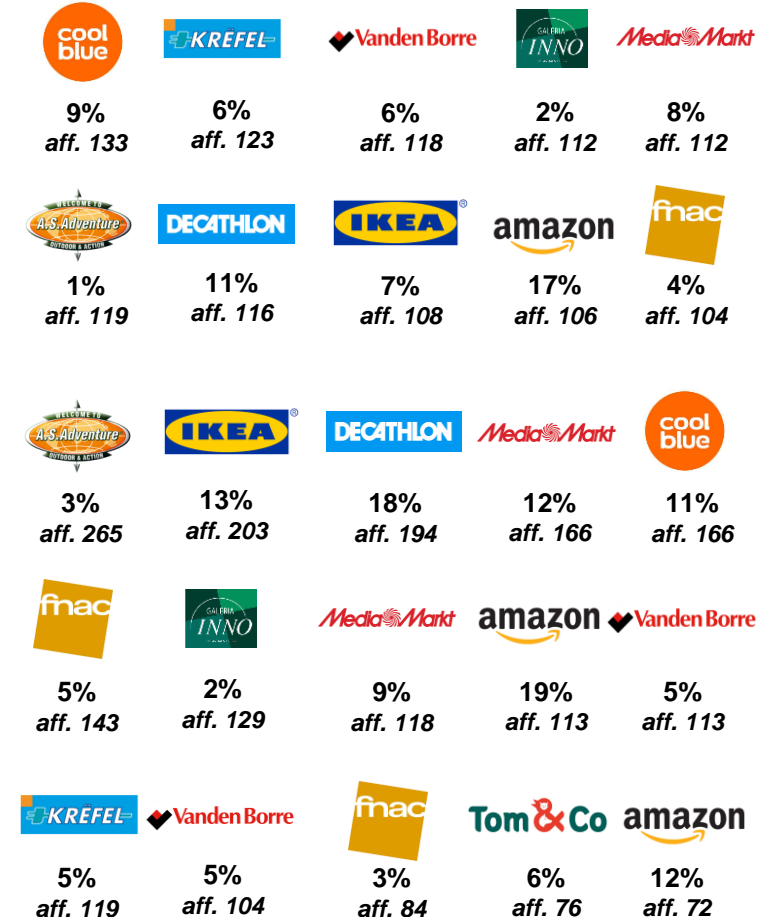
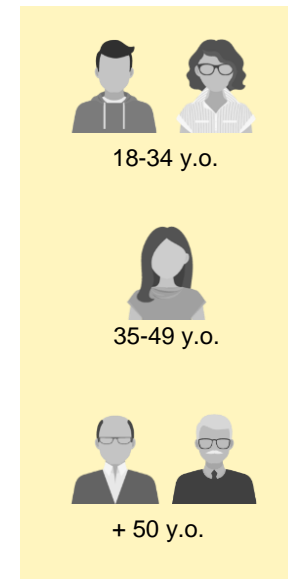
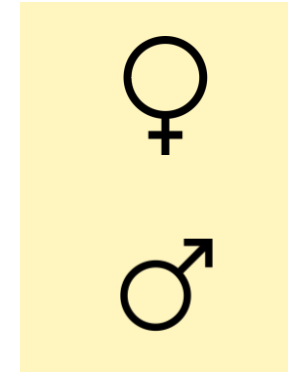
# DIGITAL NATIVES TOOK ADVANTAGE OF SITUATION

## STRONG REGIONAL DIFFERENCES REGARDING PURE PLAYERS

Which non-food retailer from the list did you find the most useful during the crisis?



### TOP 5 (ranked on affinity)





# RETAILERS IN NON-FOOD WILL FACE TOUGH TIMES BUT BE PREPARED

## BASIC NEEDS DURING CONFINEMENT?



Besides food & essential products, think media, cultural products & services in a “home sweet home” configuration

## WELL-EQUIPPED



Most Belgians are well-equipped regarding tech products. *Intentionalists* postponed their purchases massively but few are really missing new tech products

## NEARLY 6 OUT OF 10 WANTED TO REVAMP THEIR DECO



And again, spendings in decoration will have to wait till after the lockdown and the evolution of the financial solution for 1 out of 2 *intentionalists*

## 1 OUT 2 WANTED TO BUY HOUSEHOLD APPLIANCES



But 1 out of 2 intentionalists have seen this resolution melting during the lockdown

## MOST USEFUL NON-FOOD RETAILERS:

1 **bol.com** 

2 **amazon** 

3 **DECATHLON** 





# WEB

Time to reinvent ourselves: we took a step back to analyze big announcements days in details.

Don't panic: there's a focus on last week as well. Share of time goes to financial news. Volume goes to hyperlocal news.

Don't neglect the power of magazines.

Social? Organic posting is the minimal. But rethink your plans integrating streaming platforms... Not convinced? See the stunning results of twitch.tv!





# THE MEDIA ATTENTION HAS SHIFTED

From a focus on health to the financial & economical consequences for people and companies

44%

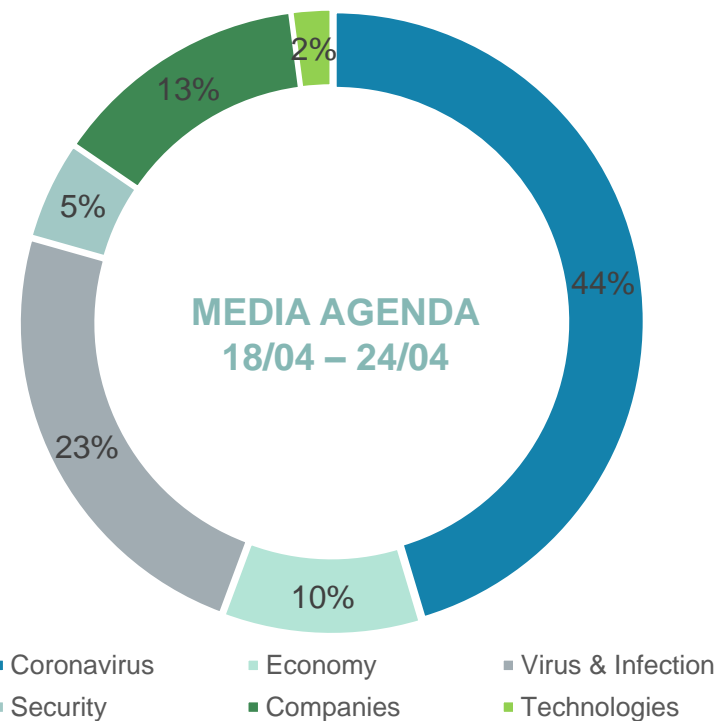
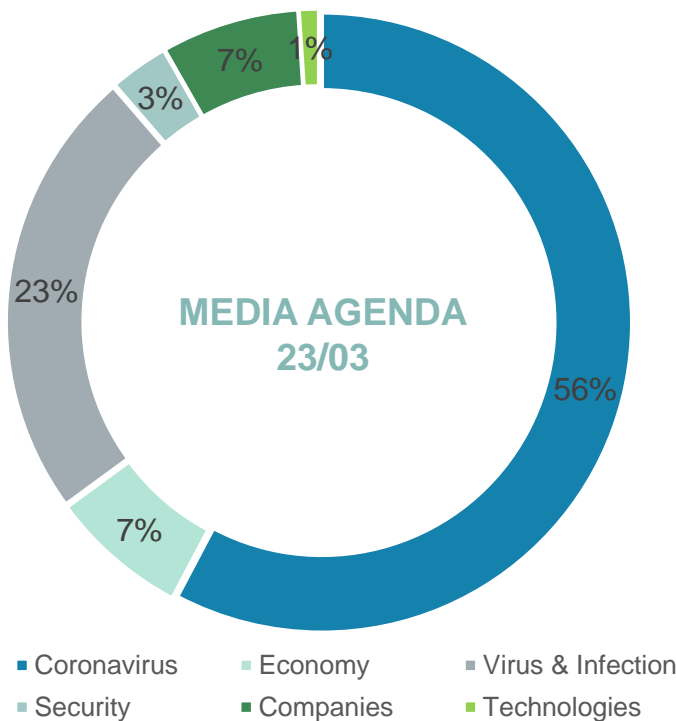
of Belgians think that media spend **too much time** discussing about the crisis

VS

45%

of Belgians think that media allocate the **right amount of time** to the crisis

**whyte** DEDICATED  
corporate affairs



Media agenda: overview of the themes present in the total daily media context. i.e. the themes are not specifically linked to the coronavirus.



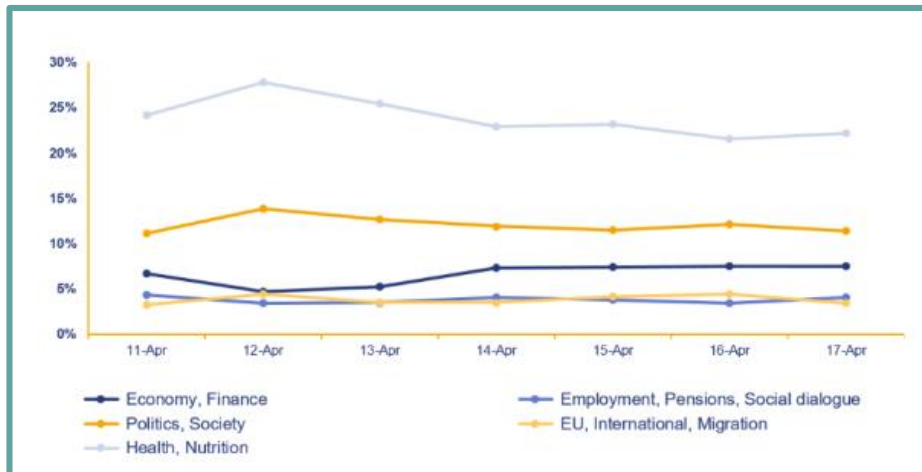


# EXIT STRATEGY REVIVES THE PRESS ATTENTION

After a huge drop in the number of articles and mentions of Coronavirus in the Belgian on- & offline press during the Easter Holidays, there has been a slight upturn this week



## Evolution of the main media issues related to the Covid-19 crisis



## TOP 5 mentioned brand and sectors

11-17 April 2020

### TOP 5 BRANDS

1. Amazon
2. Apple
3. Red Cross
4. Google
5. Engie Electrabel

### TOP 5 SECTORS

1. Distribution
2. Banks
3. Hospitality
4. ICT / Telecom
5. Tourism

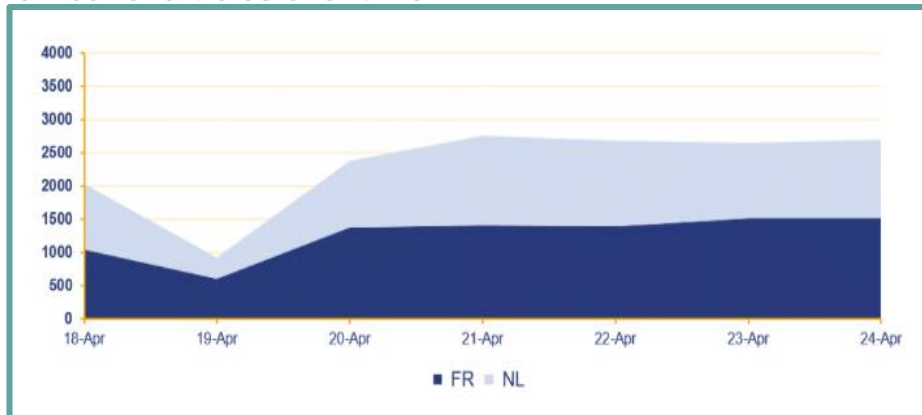
18-24 April 2020

1. Proximus
2. Netflix
3. KU Leuven
4. Amazon
5. Google

1. Distribution
2. Hospitality
3. Banks
4. ICT / Telecom
5. Tourism

Following its decision not to renew its sponsorship contracts in the Pro League (Belgian football championship), Proximus (377 mentions) becomes the most mentioned brand

## Number of articles over time



11-17 April 2020

**15.909** articles\*

- 13,23% compared to the previous week

**550.908** mentions\*

- 12,85% compared to the previous week

18-24 April 2020

**16.159** articles\*

+ 1,57% compared to the previous week

**573.123** mentions\*

+ 4,03% compared to the previous week

\* articles and mentions mentioning Coronavirus/Covid-19 in offline and online press





# HYPERLOCAL DOMINATES

Flemish people turn immediately to newsbrands online for more information about major announcements. Friday 24th was no exception



## TOP 3 audience share (28/04)

(the share of the audience of the media in the total audience of all media)



30%

Het Nieuwsblad

23%

dS De Standaard

9%

Increase of the interest in some medias and websites on Facebook and Instagram

DeMorgen.

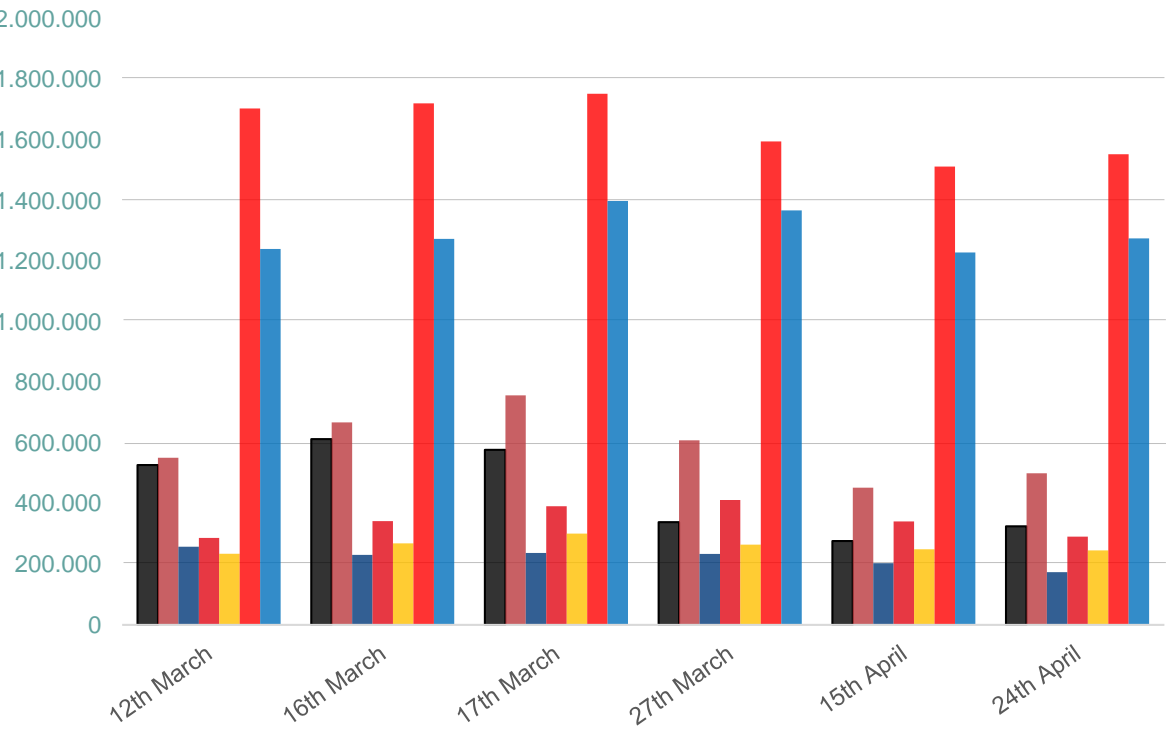
+ 16%



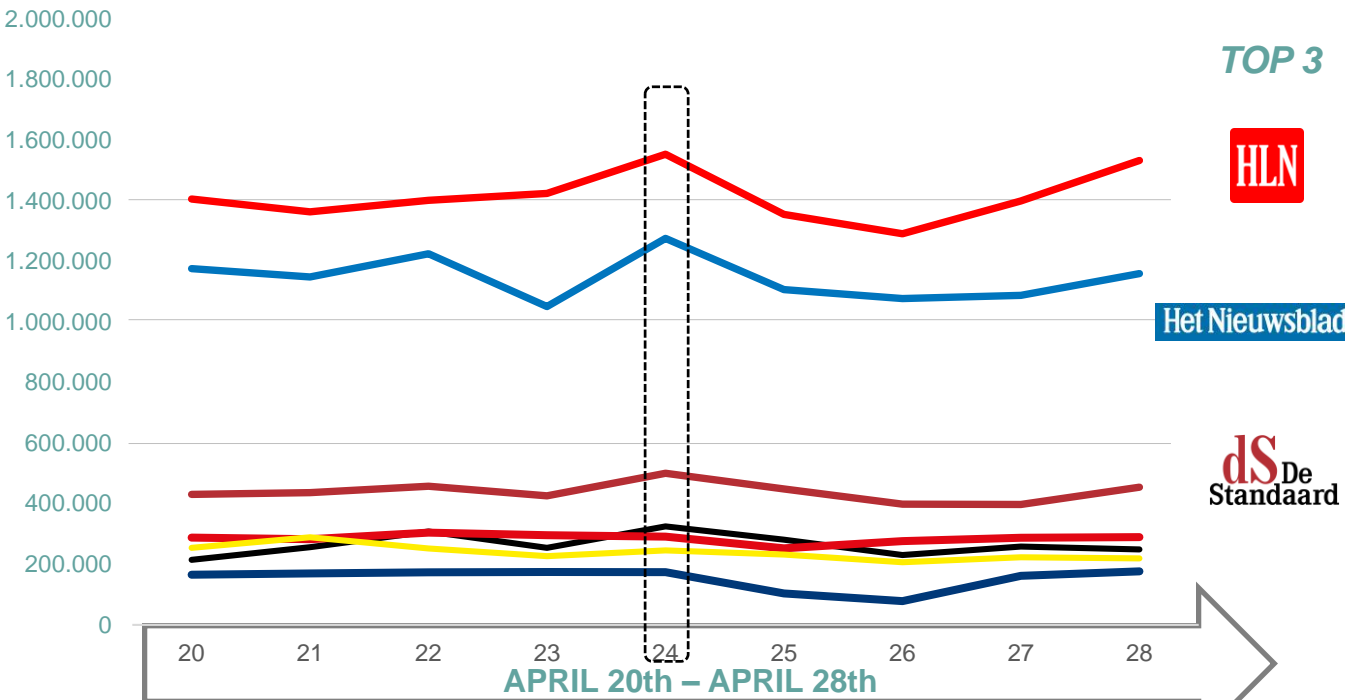
+ 11%



real users



real users



TOP 3



Het Nieuwsblad

dS De Standaard



Source : Gemius/CIM - gemiusAudience study: Multiplatform - Population 12+



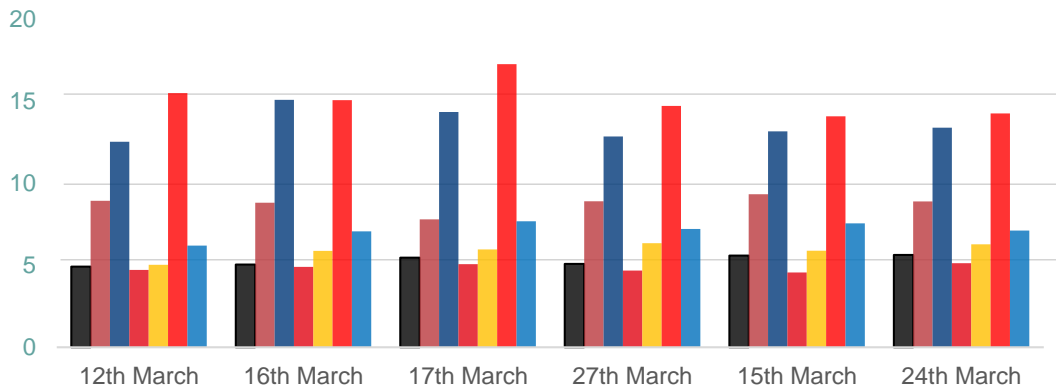


# FINANCE NEWS GET MORE SHARE OF TIME

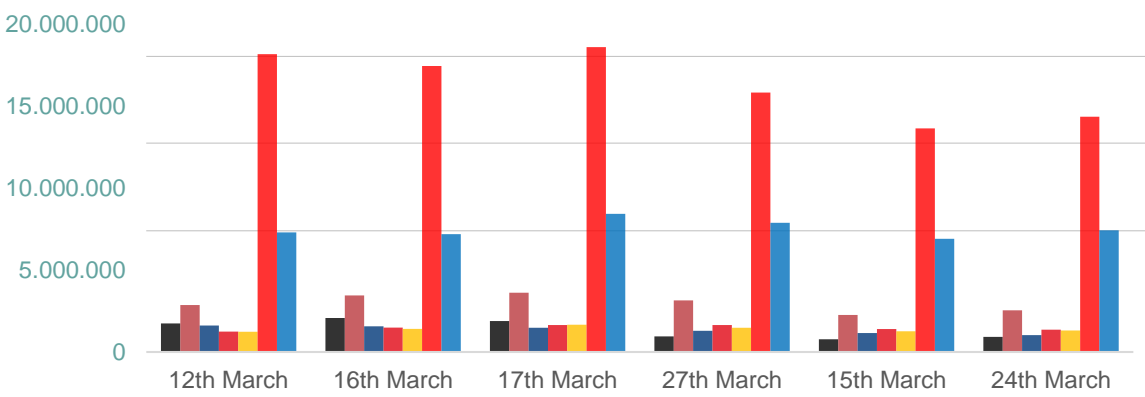
Champion HLN challenged by De Tijd & DS in share of time



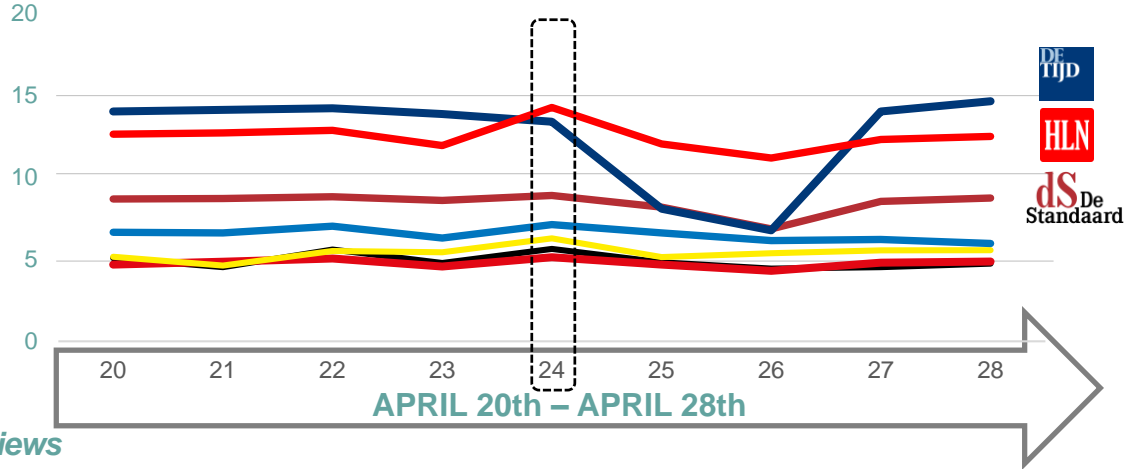
avg. time spent  
(min.)



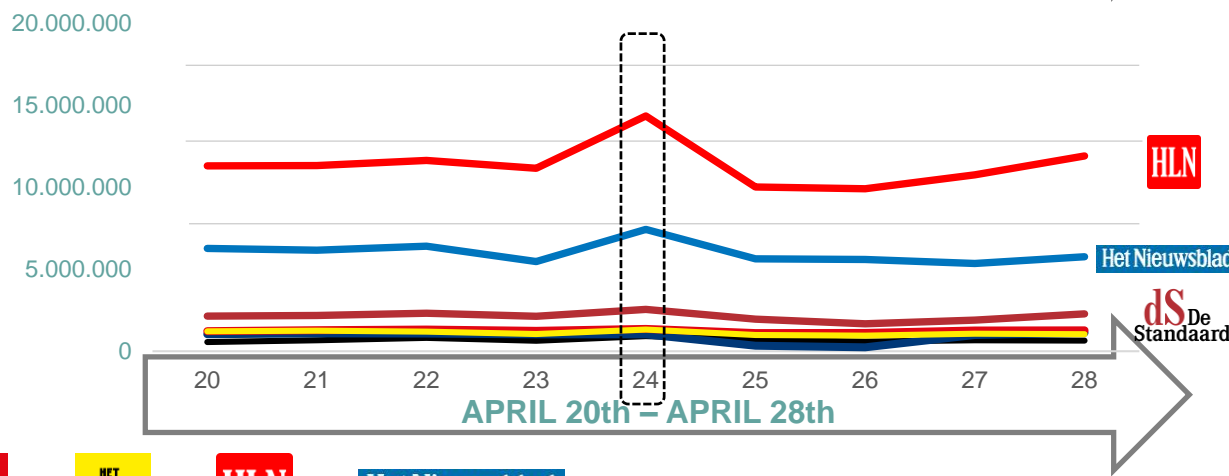
pageviews



avg. time spent  
(min.)



pageviews



Source : Gemius/CIM - gemiusAudience study: Multiplatform - Population 12+





# BIG DIFFERENCES BETWEEN SITES ON APRIL 24<sup>th</sup>

Only DH 'benefited' from the announcement on Friday April 24<sup>th</sup> and La Libre with some delay



*TOP 3 audience share (28/04)*  
*(the share of the audience of the media in the total audience of all media)*

Sudinfo.be

13%

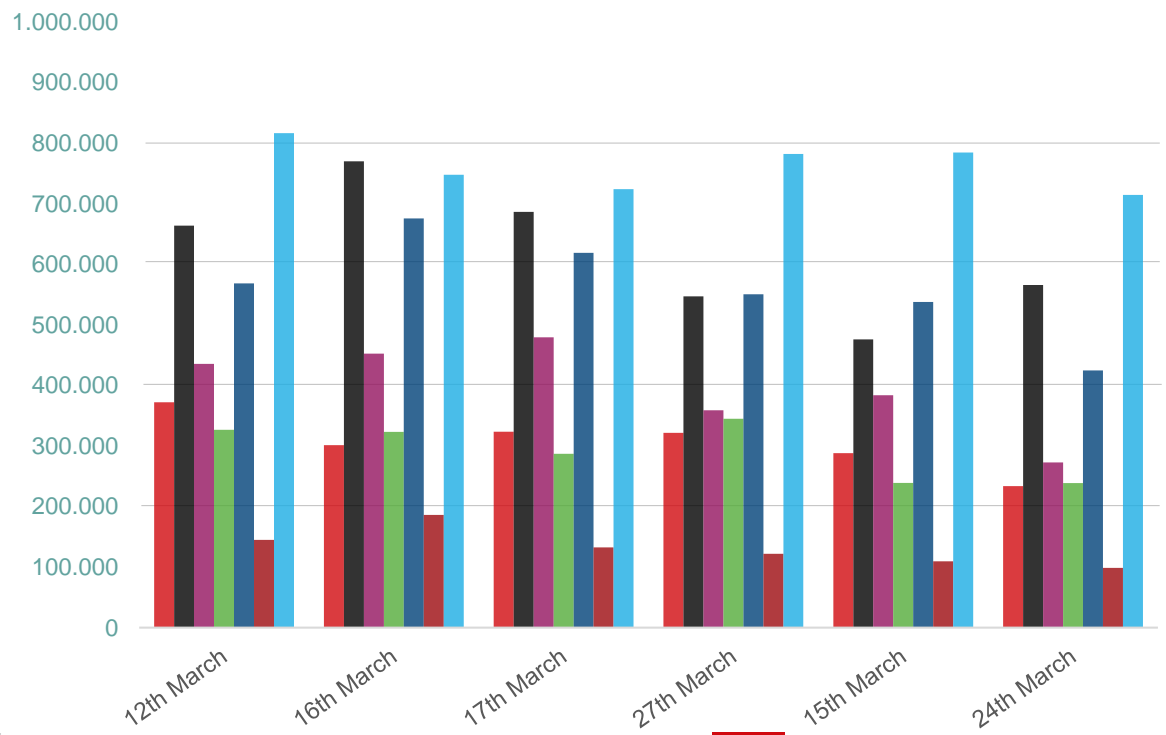
LE SOIR

10%

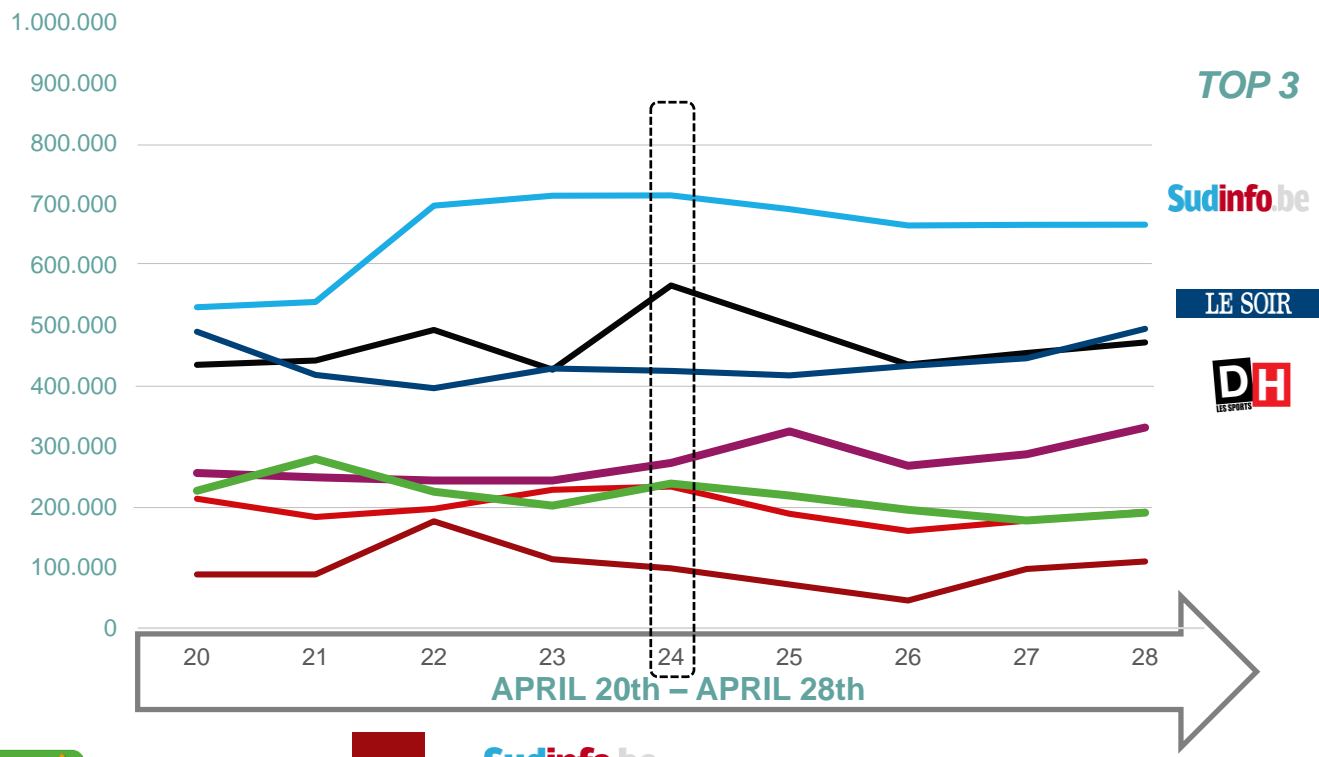
DH  
LES SPORTS

9%

real users



real users



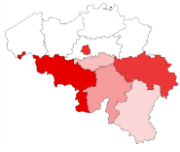
Source : Gemius/CIM - gemiusAudience study: Multiplatform - Population 12+



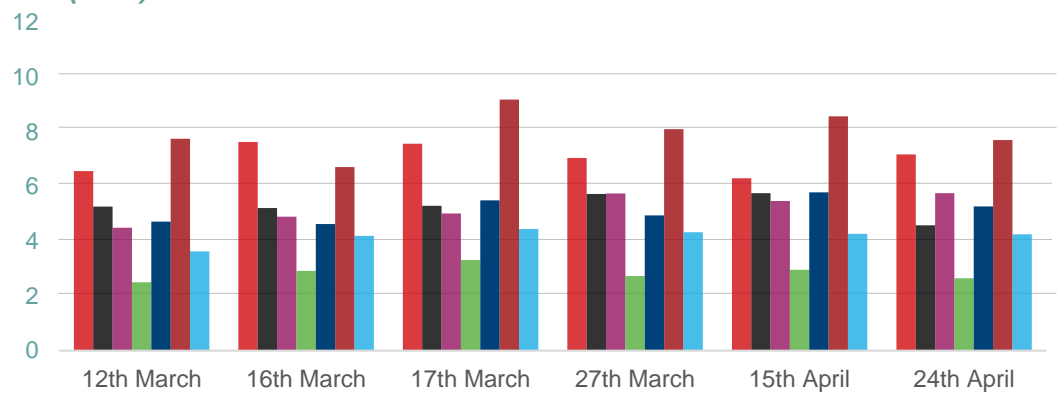


# WALLOONS SNACK NEWS ... AND MONITOR THE STOCK MARKET

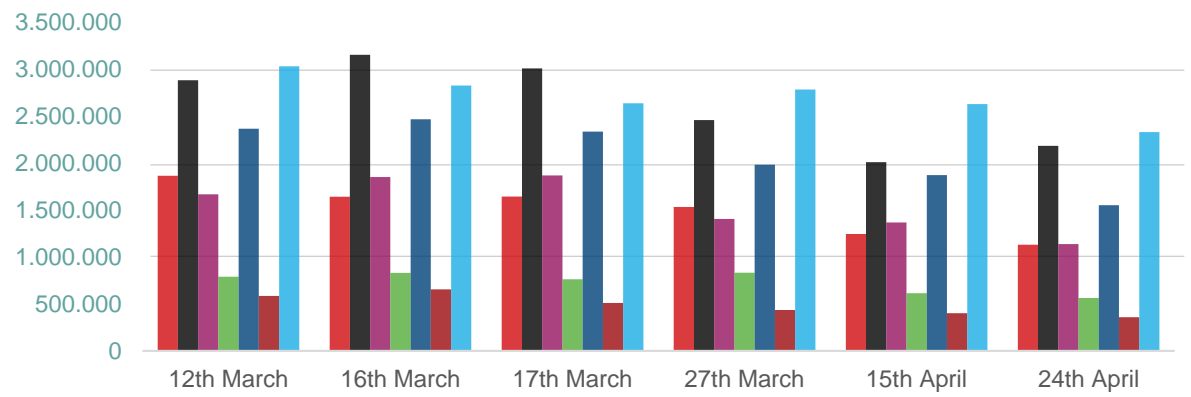
## 7sur7 & L'Echo head to head in share of time



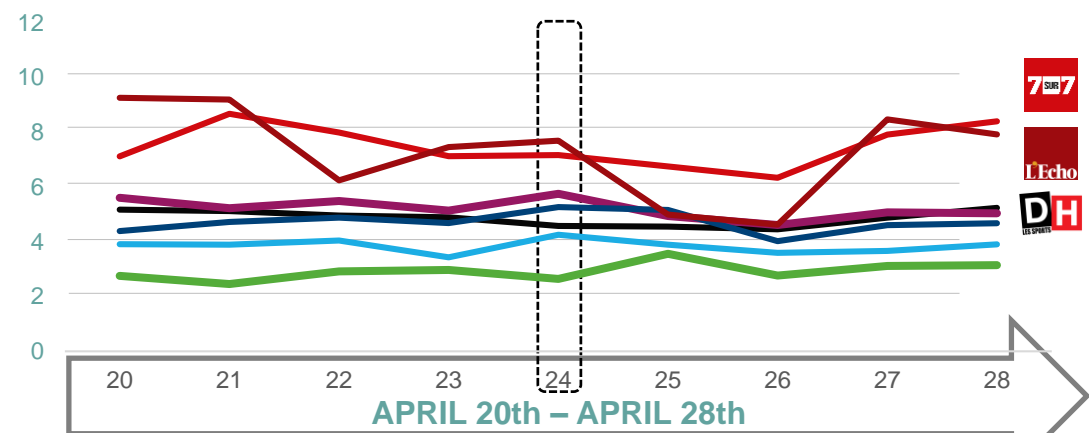
avg. time spent (min.)



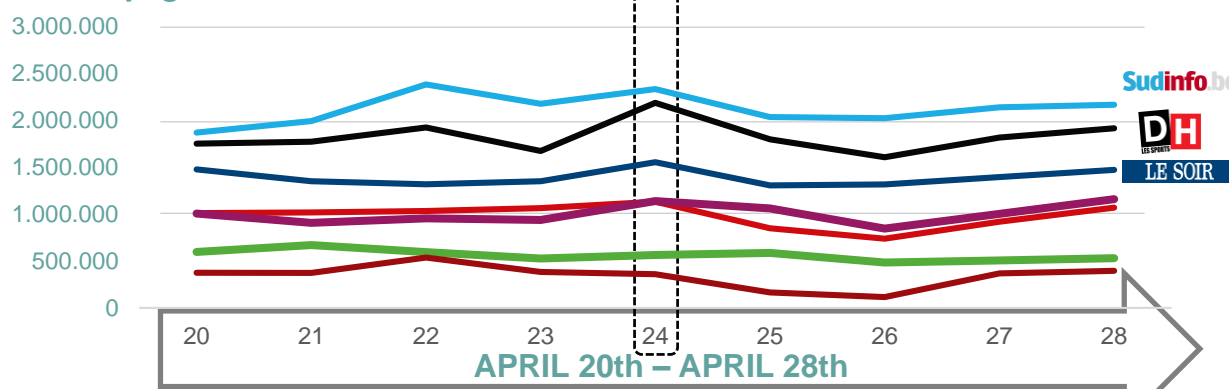
pageviews



avg. time spent (min.)



pageviews



Source : Gemius/CIM - gemiusAudience study: Multiplatform - Population 12+





# THEMATIC MAGS DO NOT KNOW THE CRISIS (online)

## #SayItWithFlair boosts visits on the site (see also next slide)

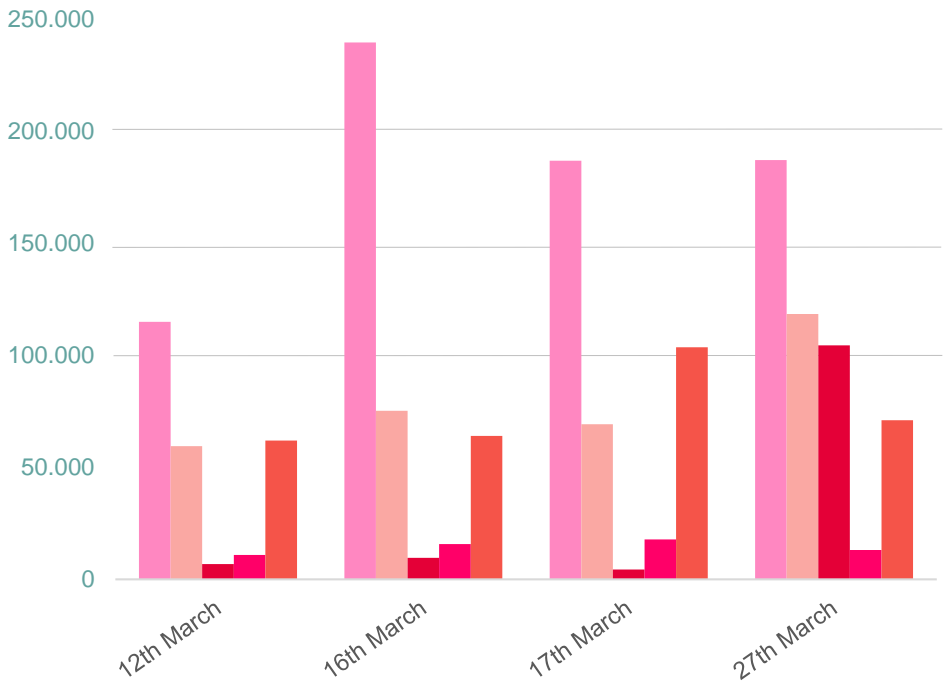


### evolution visits

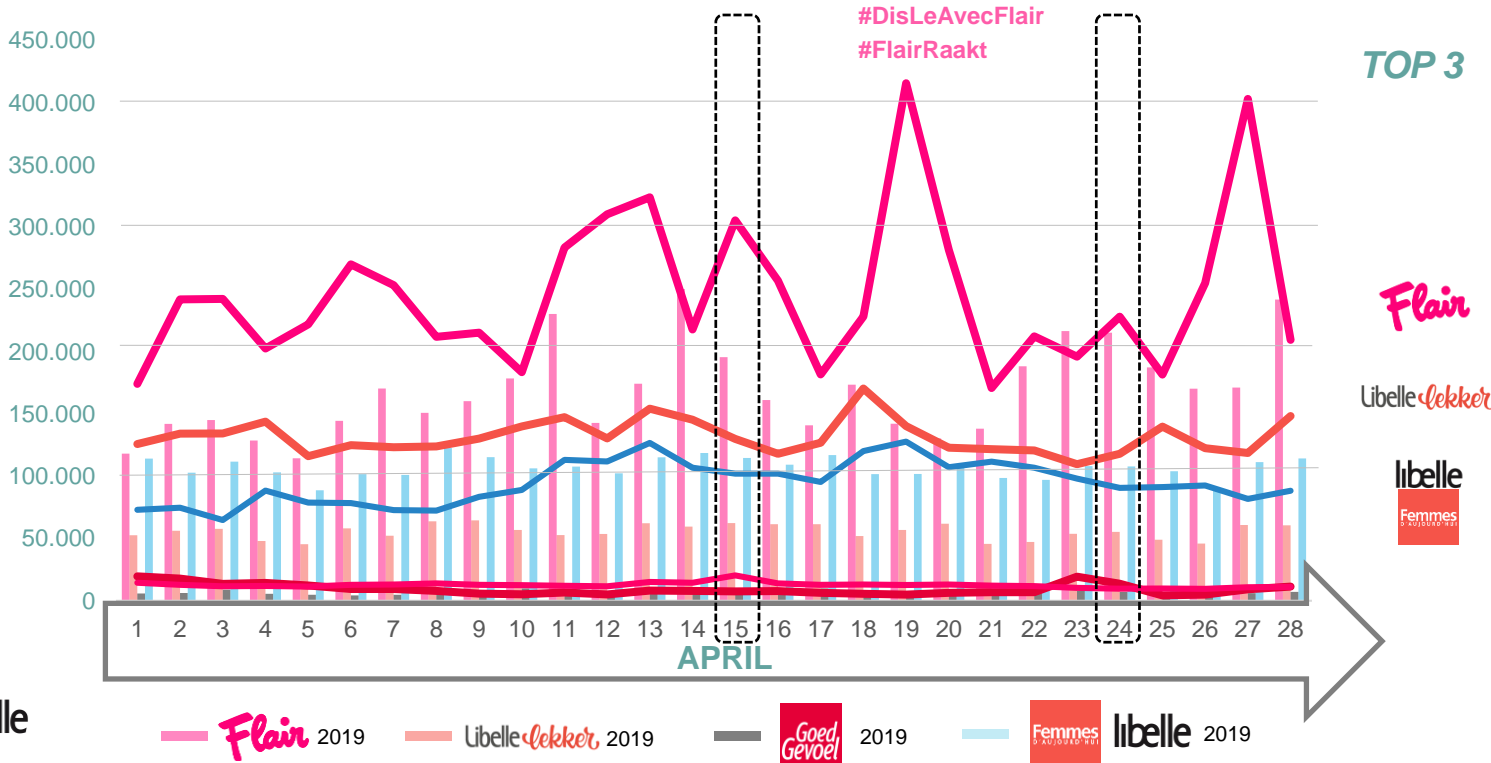
01/03/2019 > 12/03/2019	VS	PRE-LOCKDOWN 2020 (01/03/2020 > 12/03/2020 VS 13/03/2020)
13/03/2019 > 28/04/2019	VS	LOCKDOWN 2020 (13/03/2020 > 28/04/2020)
PRE-LOCKDOWN 2020	VS	LOCKDOWN 2020

Flair	libelle Femmes	Libelle lekker	Goed Gevoel
+ 31%	+ 11%	- 40%	- 24%
+ 57%	- 20%	- 7%	+ 32%
+ 16%	- 38%	+ 38%	- 10%

### visits



### visits





## BRAND OPTIMISM

# MAGAZINES, SOURCE OF JOY AND INSPIRATION

## Magazines under the spotlight

unashamedly inspired by (or stolen from):



**Magazines are finding creative ways to bring proximity and joy to their readers during this crisis.**

Flair (FR & NL) allows people to send digital ready-made messages to friends and family. Messages can be customized.

Other initiatives:

- Ciné Télé Revue created a newsletter called “OnResteChezSoi” (WeStayAtHome)
- Top Santé launched a Facebook Q&A about health
- Trends Tendances discuss Corona on a humoristic note in a podcast every Tuesday and Thursday
- Libelle shares inspiring videos and photos to boost everyone’s mood during the crisis
- Dag Allemaal allows users of their website to create their postal card (“Together Against Corona”); etc.

# Flair

SI ON NE PEUT PLUS  
SE TOUCHER,  
ON TROUVERA LES MOTS  
QUI LE FERONT

#DisLeAvecFlair

If we can't touch each other, we will find the words that will

#DisLeAvecFlair  
#FlairRaakt

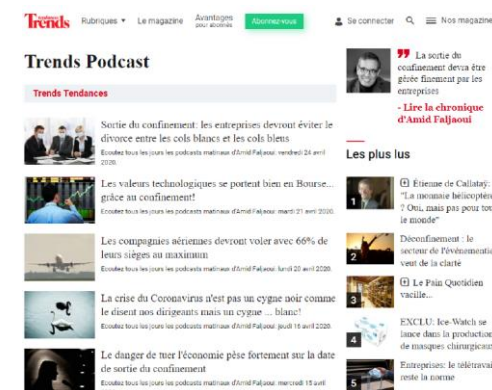
{NAAM}  
IK MOEST BELLEN,  
WANT KLOPPEN  
GAAT NIET.

WILL YOU  
BE MY  
QUARANTINE?

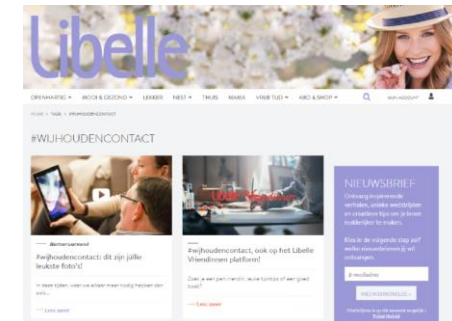
#FlairRaakt



Health Q&A



Podcasts



Keeping in Touch -  
WijHoudenContact





# COST PER REACH ONE STEP CLOSER TO HITTING BOTTOM



**Dramatic decrease since Sunday 26<sup>th</sup>**

avg CPR



MARCH 1<sup>st</sup> – APRIL 29<sup>th</sup>

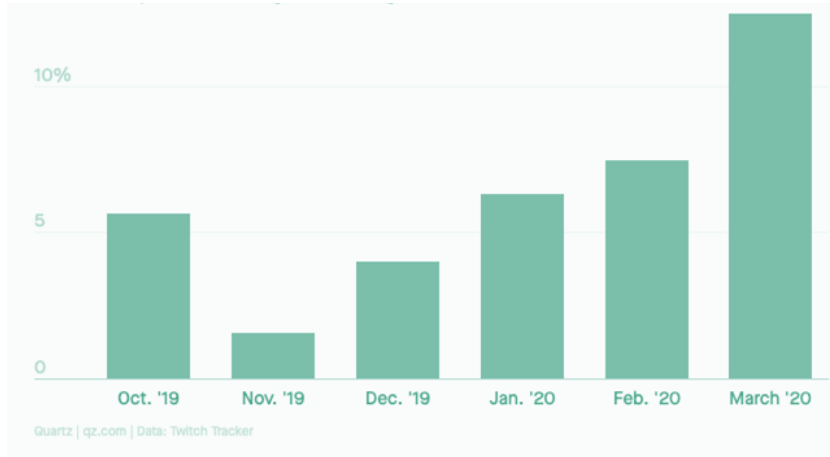




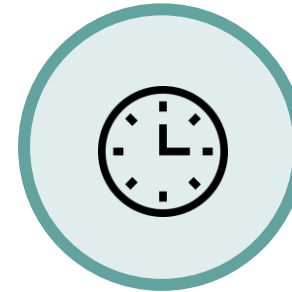
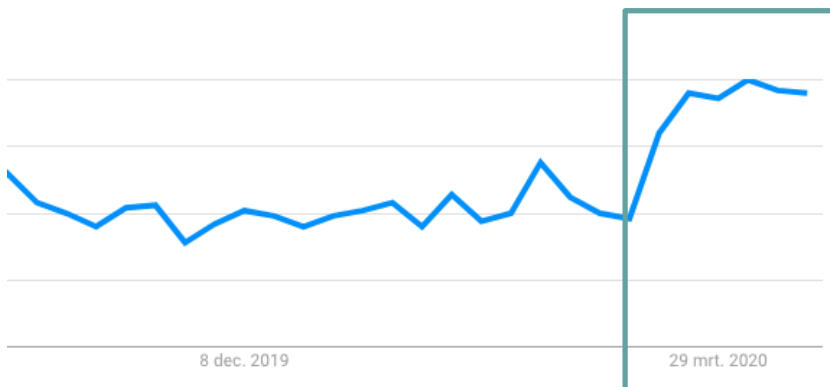
# THE EXPLOSIVE GROWTH OF GAMING

**Twitch: more views, content and channels than ever**

Year-over-year % change in average viewers on Twitch



Peak of Twitch searches since the start of the lockdown in Google Trends



**> 1300M hours**

of viewing time since March



**almost 60%**

increase in comparison to the first weeks of 2020



**1,2M**

active users in Belgium





# ORGANIC IS THE MINIMAL EFFORT TO DO

## But are still talking organically during the COVID-19 crisis

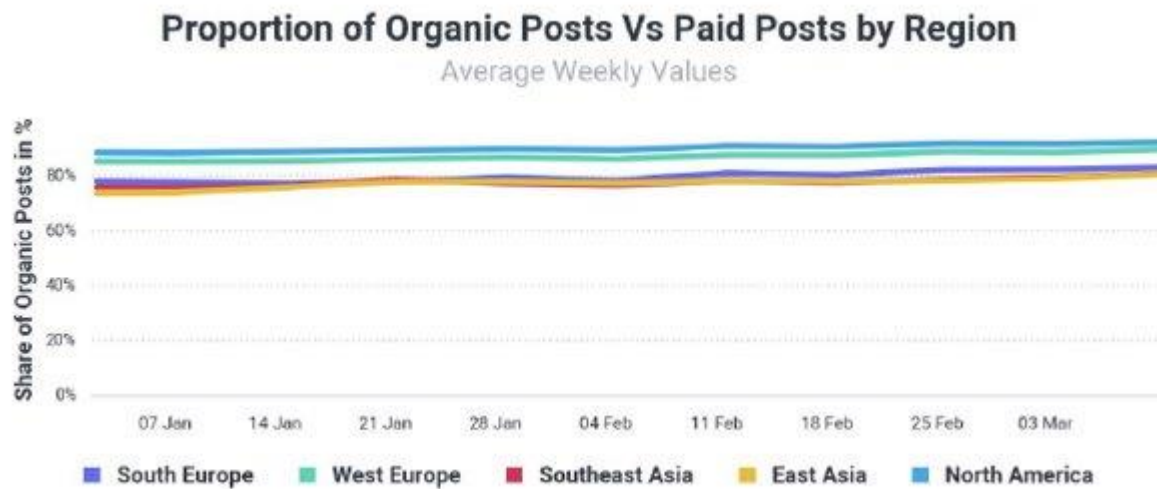
Several marketeers have called out brands hesitating to communicate during the COVID19 lockdown. While we do see an overall decrease in spending on Social Media, there is one terrain where communication hasn't gone down: organic posting.

Brands are aware they should at least have a minimal layer of communication, showing how they're tackling COVID-19, thanking healthcare and other workers, informing clients of opening hours or update services and more. Organic posting on their social account is fairly safe, since mostly only dedicated fans and followers receive this kind of info, so less risk for negative fall-out.

### *Decrease in spending on Social Media*



### *Steady organic posting*







# TELEVISION

What a week: a new announcement by our government, the bold move from insurer Corona Direct in a new TV spot (in our dedicated #BRANDOPTIMISM case), SBS upgrades pauzeknop, and *The Young and the Restless* soap faces great production and thus broadcasting problems. With possible repercussions in our markets...

We love our job!

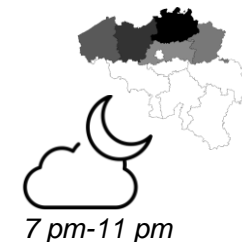
Discover more insights and inspiration in the following pages. Enjoy!



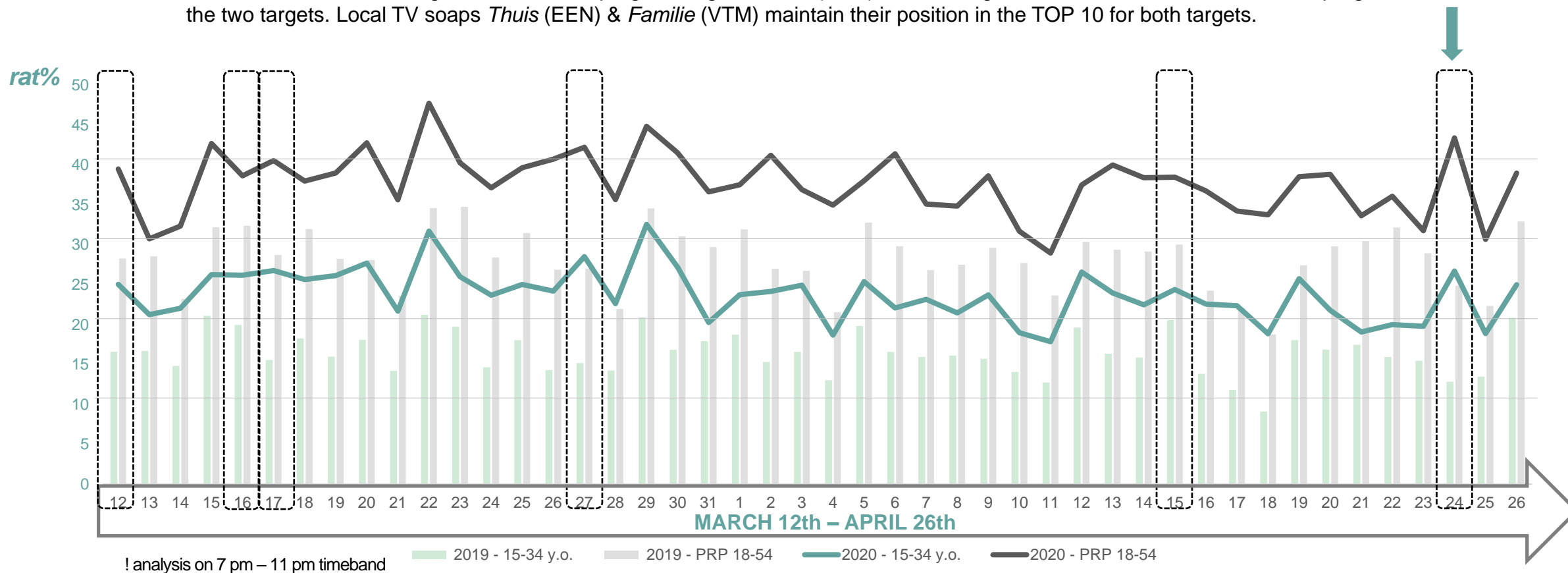


# ENTERTAINING REALITY & (LOCAL) MUSIC SCORE

At the expense of NEWS, except for announcements of the government



Sunday is always the weekly appointment for the Flemish population with *De Mol* (VIER) and *Blind getrouwd* (VTM). *Cafe De Mol* also appears in the TOP 10 for both targets, following the big final of *De Mol*. *Liefde voor Muziek* (VTM) still ranked in the TOP 5 programs for 15-34 & PRP 18-54 targets. The new TV program *Lego Masters* (VTM) is becoming a habit and was still in the TOP 10 programs on the two targets. Local TV soaps *Thuis* (EEN) & *Familie* (VTM) maintain their position in the TOP 10 for both targets.

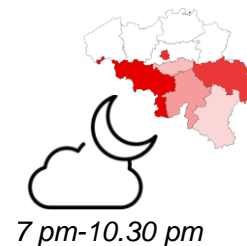




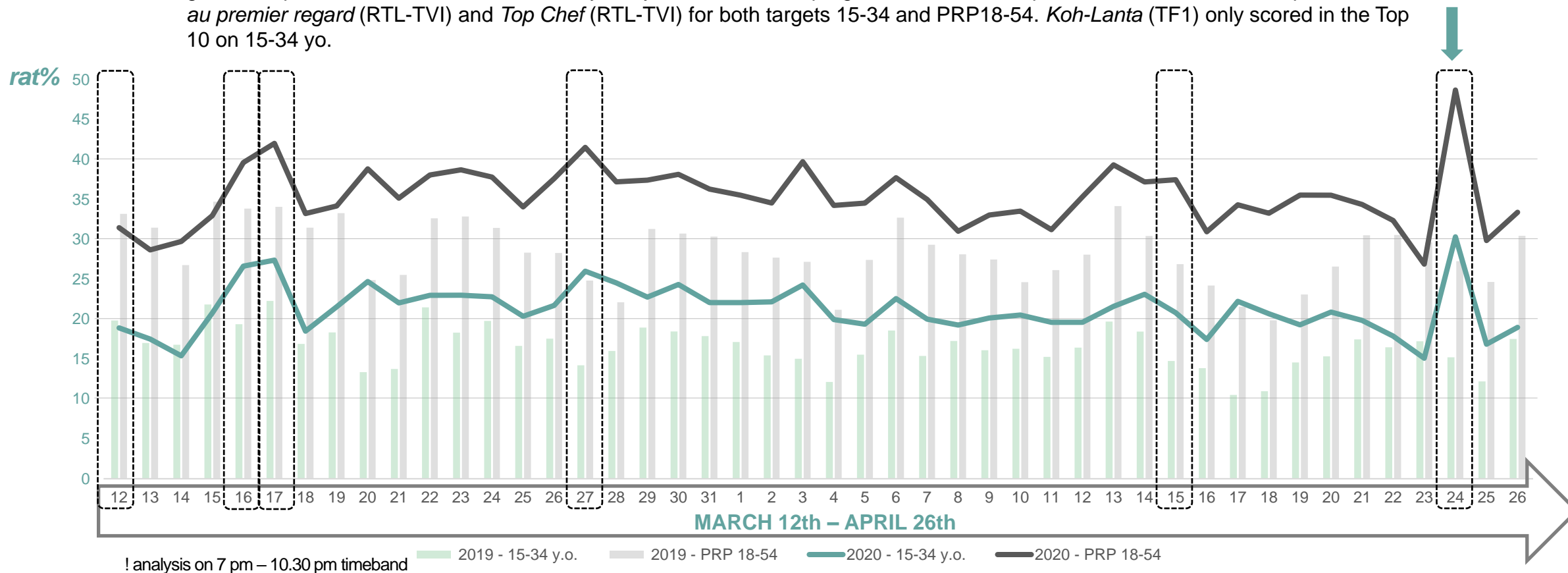


# NEWS & ENTERTAINMENT RULE

Evening news is always a daily appointment... but entertainment & social reality boost audiences



NEWS, NEWS, NEWS, French-speaking Belgians are hungry for news. Even last week! Thanks to its daily news programs *RTL Info 19h* and its special editions, RTL dominated the TOP 10 programs. With its special edition *Questions en prime*, La Une managed to get a new place in the TOP 10 on last Friday. Only 3 entertainment programs were in the top of the week, the usual suspects: *Mariés au premier regard* (RTL-TVI) and *Top Chef* (RTL-TVI) for both targets 15-34 and PRP18-54. *Koh-Lanta* (TF1) only scored in the Top 10 on 15-34 yo.







# THE IMPACT OF BIG ANNOUNCEMENTS VISIBLE DAY & NIGHT

Rather more visible in the evening and on young adults



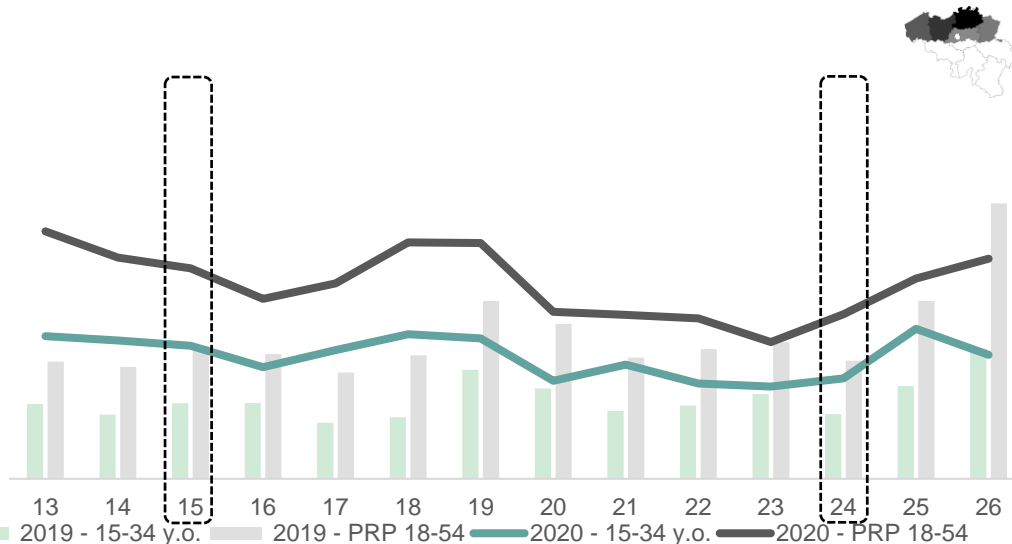
2 am-5 pm

01:31:45

01:01:10

00:30:35

00:00:00



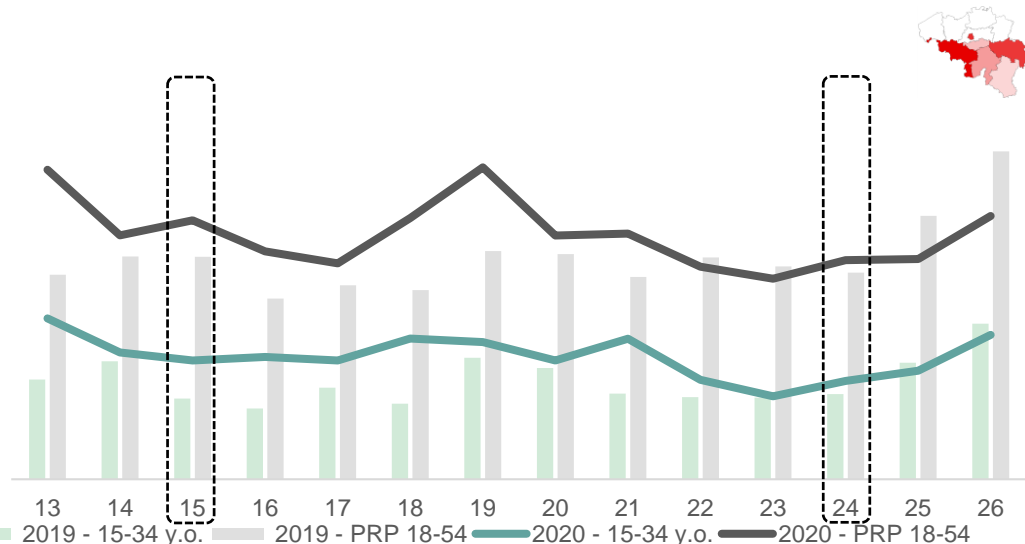
02:02:21

01:31:45

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00:30:35

00:00:00



7 pm-11 pm

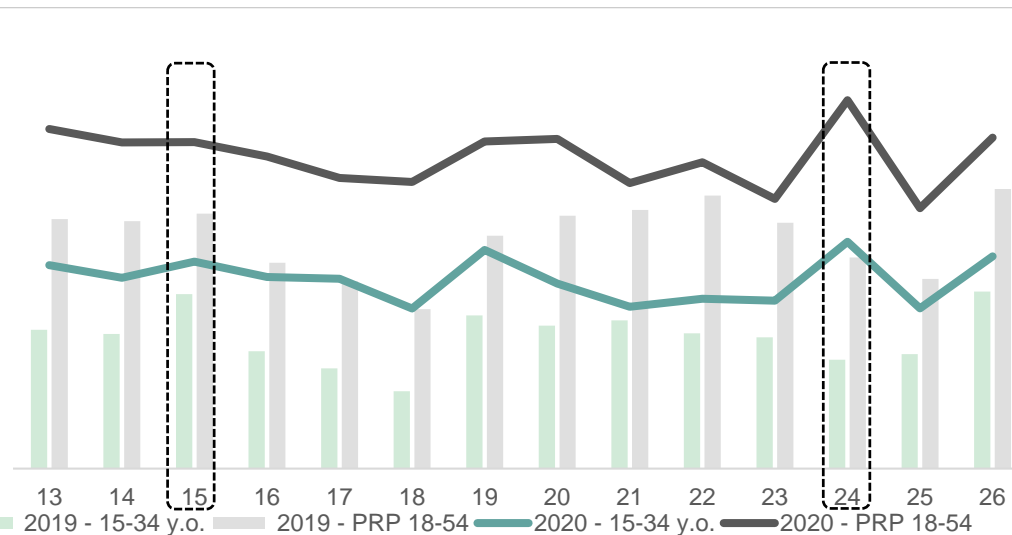
02:02:21

01:31:45

01:01:10

00:30:35

00:00:00



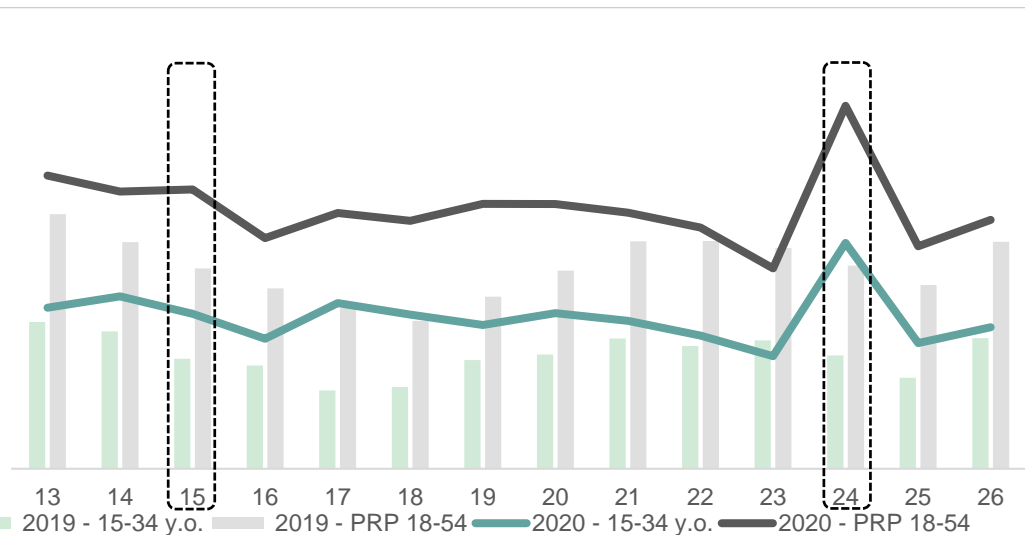
02:02:21

01:31:45

01:01:10

00:30:35

00:00:00







# TV CHANNELS CHALLENGED BY OTHER ACTIVITIES ON TV SCREENS

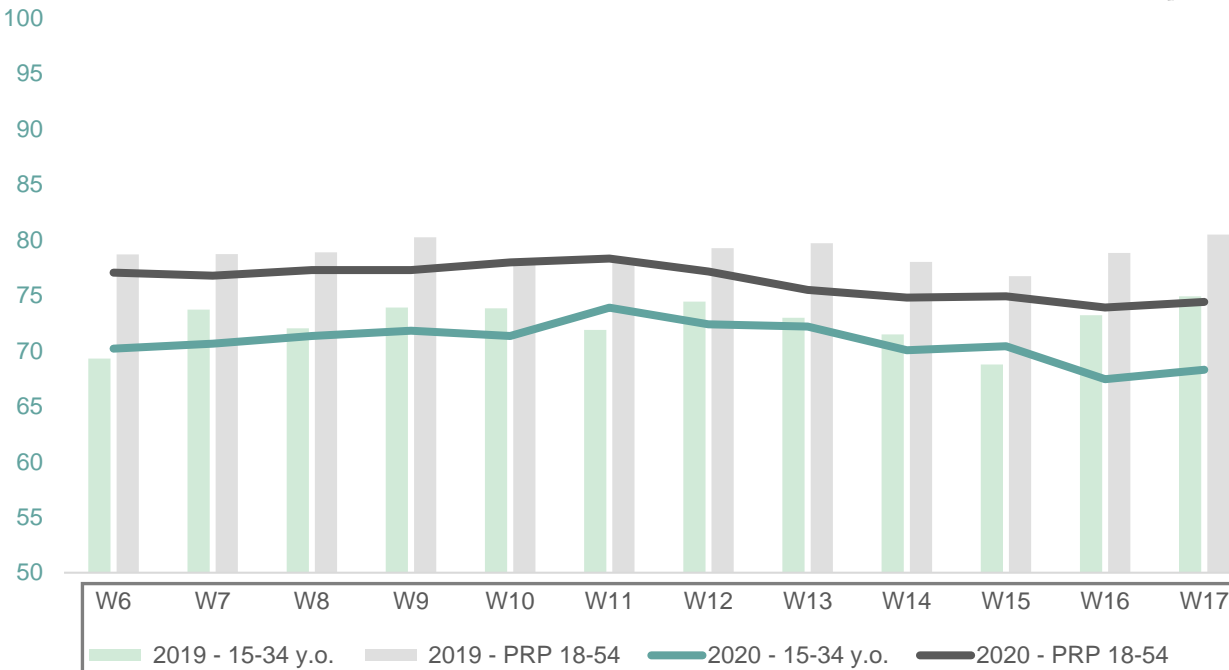
Market share of TV channels are slightly declining in favour of (S)VOD services & other options, especially in the South and on younger targets



2 am-2 am

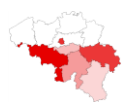
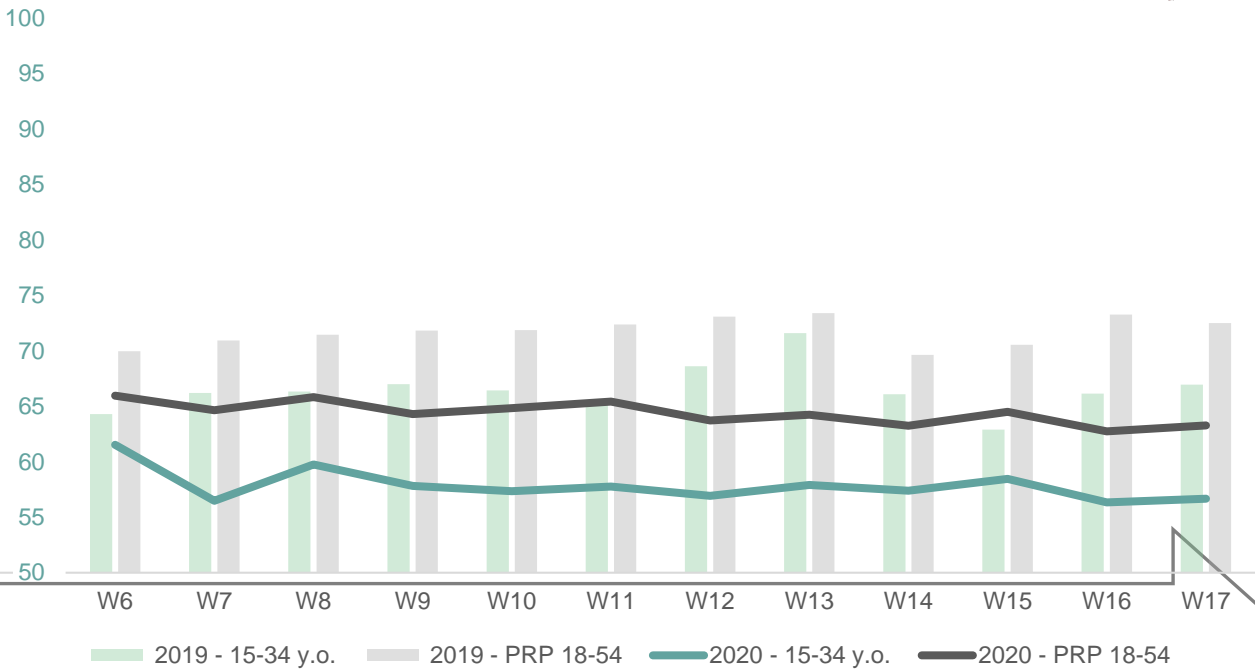
avg share%

TV CHANNELS WITHIN TOTAL SCREEN USAGE



avg share%

TV CHANNELS WITHIN TOTAL SCREEN USAGE





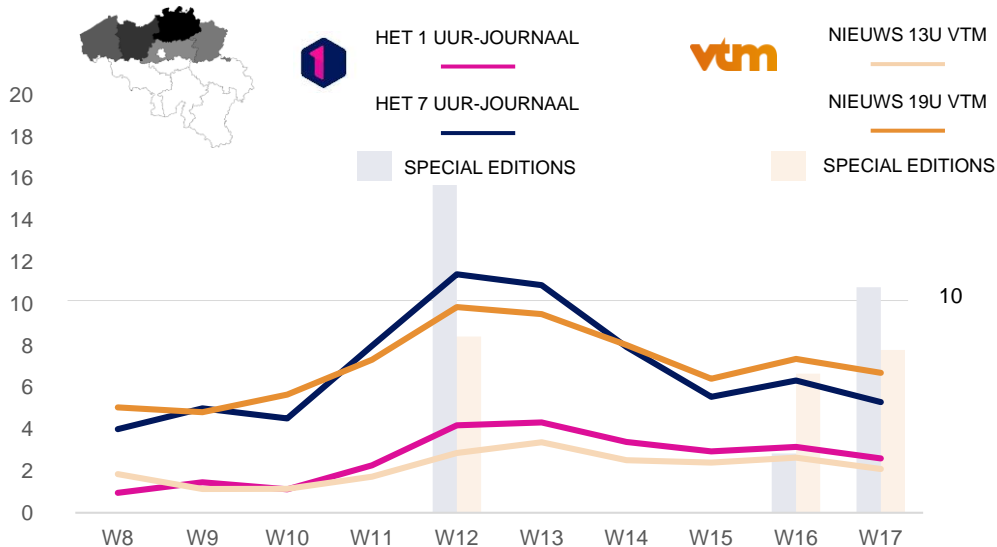


# YOUNG FR ADULTS MORE INTERESTED IN NEWS THAN FLEMISH GEN YZ

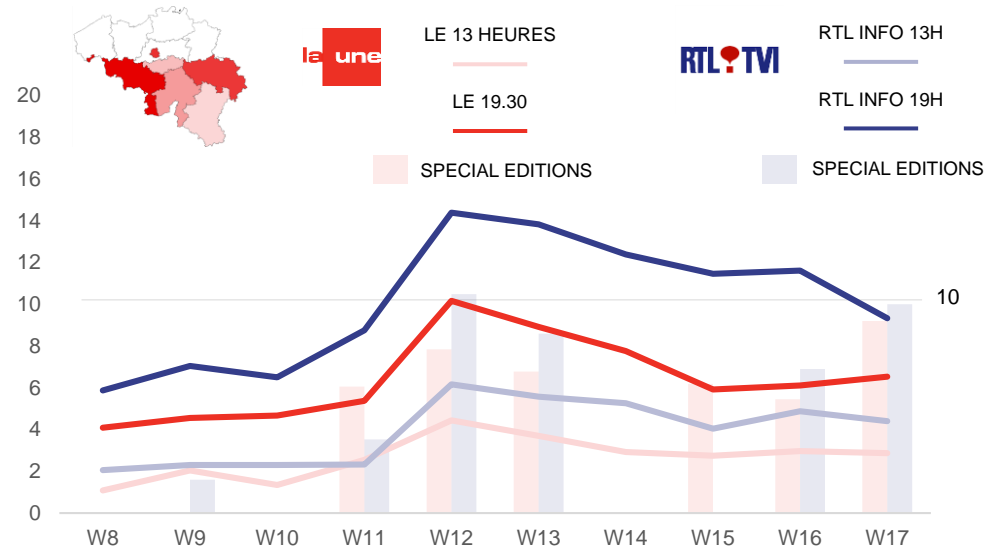
VTM NIEUWS leads the way in the North, RTL INFO maintains its leader position in the South

TARGET 15-34

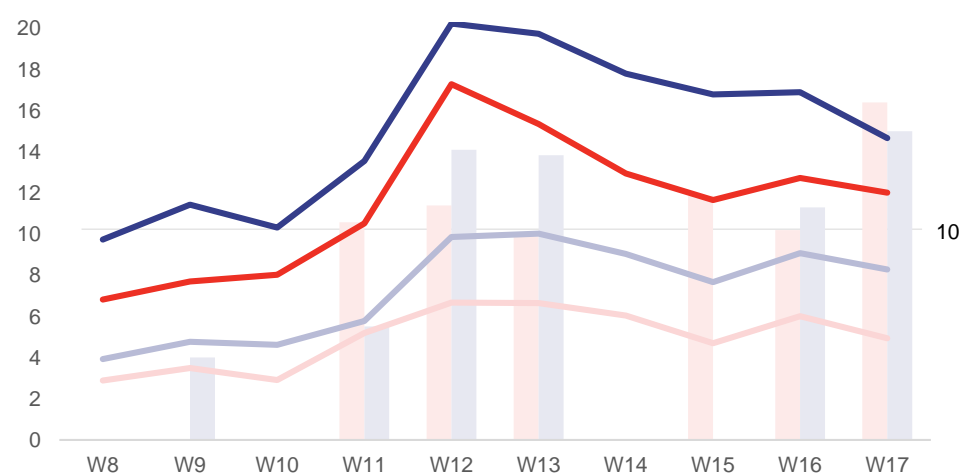
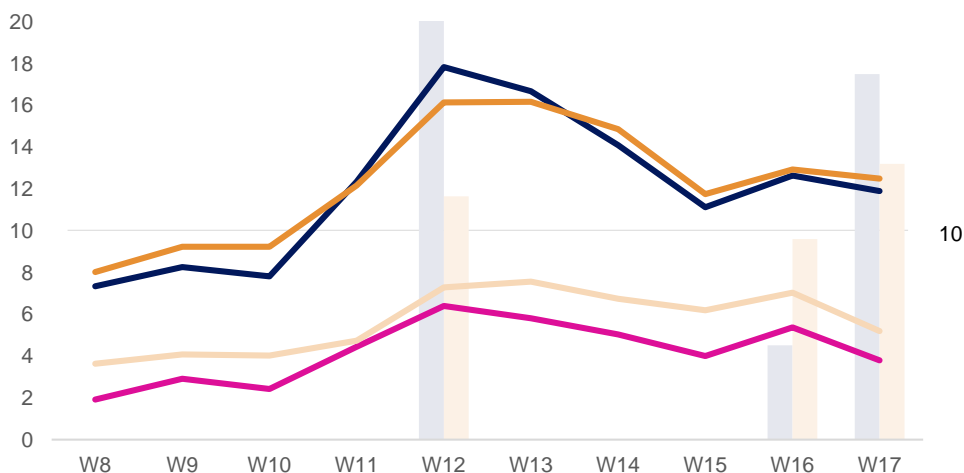
rat%  
average



rat%  
average



TARGET PRP 18-54



Reminder: W11 = Confinement Announcement - W12 = Confinement Beginning

W16 = Confinement Ending Period announced and fixed on May 3th - W17 = Announcement of the deconfinement measures from May 4th

Source: Havas Media BE elaboration of Nielsen / GFK data - Live + Vosdal

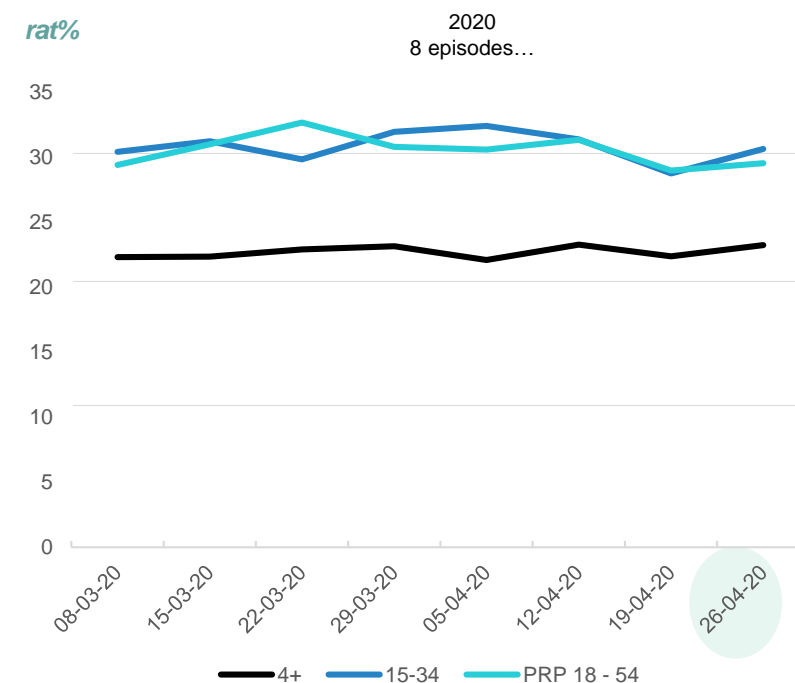
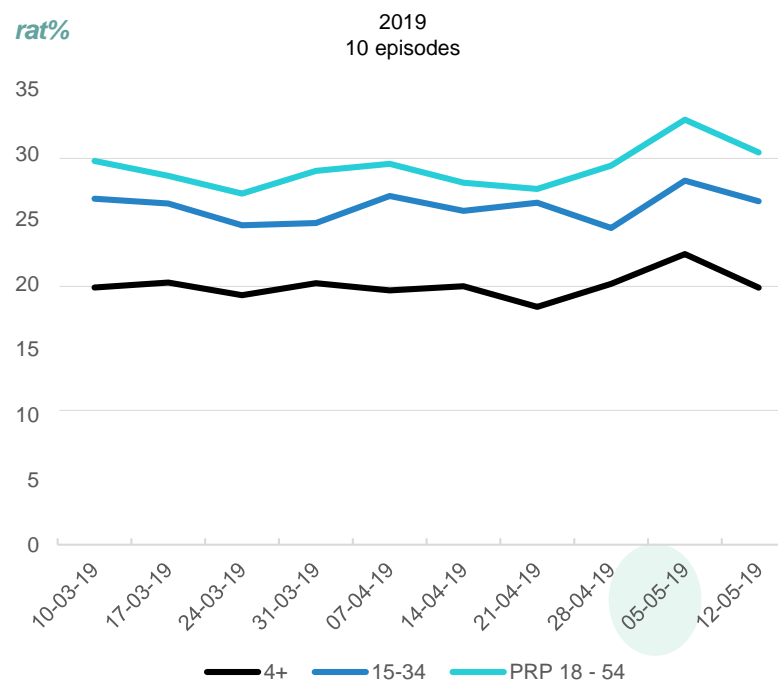
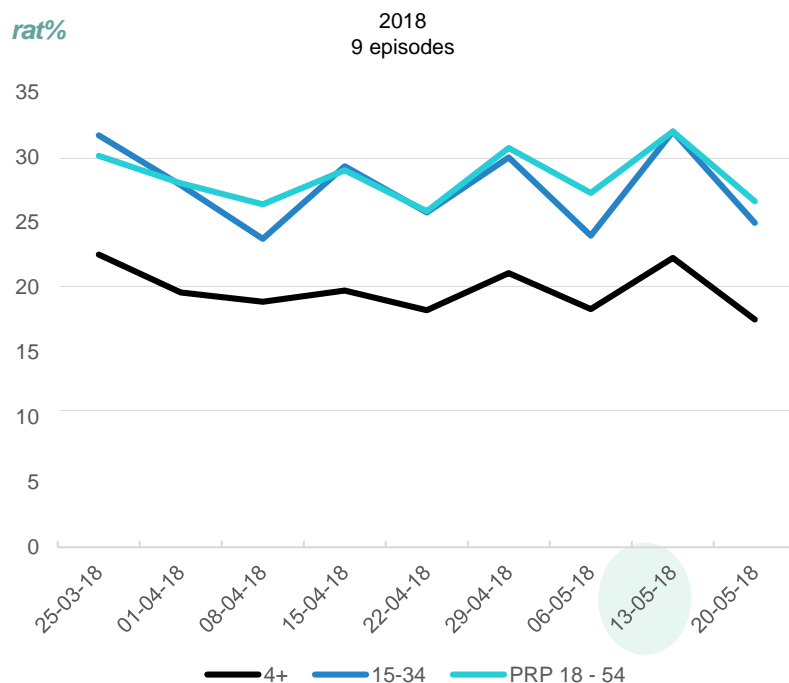




# THE SABOTEUR OF *DE MOL* IS KNOWN ALWAYS A SAFE BET



Year after year *De Mol* maintains its position of TOP Program in Flanders, keeping its audience ratings high. *De Mol* has even increased its average audience by +13% between 2019 and the current edition for 4+ target and +17% for 15-34. For the PRP 18-54 target, ratings are stable. Audience peaks are observed for final episodes of each season: May 13th in 2018, May 5th in 2019. The rating of the final episode of the 2020 edition is stable for 4+ and 15-34 targets, slightly declining for PRP18-54 compared to the rating of 2019 edition.







# JOLIEN WINS *DE MOL*

## FOCUS ON 2020 EDITION



Sunday, March 15<sup>th</sup>  
episode 2  
*Pandora*

OUT: Bruno, 50 y.o.

ratings #:  
**4+**  
1.348.149  
**15-34**  
445.855  
**PRP 18-54**  
579.440

Sunday, March 29<sup>th</sup>  
episode 4  
*De slechtste regeringsvorm.  
Op alle andere na*  
OUT: Laure, 46 y.o.

ratings #:  
**4+**  
1.396.182  
**15-34**  
456.837  
**PRP 18-54**  
575.757

Sunday, April 12<sup>th</sup>  
episode 6  
*Deelnemen is belangrijker  
dan winnen*  
OUT: Dorien, 27 y.o.

ratings #:  
**4+**  
1.403.188  
**15-34**  
447.521  
**PRP 18-54**  
586.096

Sunday, April 26<sup>th</sup>  
episode 8  
**FINAL**  
*Jolien wins De Mol!*

ratings #:  
**4+**  
1.401.832  
**15-34**  
438.623  
**PRP 18-54**  
552.413

Sunday, March 8<sup>th</sup>  
episode 1  
*Alpha – Het begin*

OUT: Gilles, 29 y.o.

ratings #:  
**4+**  
1.346.136  
**15-34**  
433.924  
**PRP 18-54**  
550.408

Sunday, March 22<sup>nd</sup>  
episode 3  
*Ariadne*

OUT: Els, 51 y.o.

ratings #:  
**4+**  
1.381.413  
**15-34**  
427.480  
**PRP 18-54**  
610.776

Sunday, April 5<sup>th</sup>  
episode 5  
*Een lach, een groet, een  
blij gezicht*  
OUT: Salim, 28 y.o.

ratings #:  
**4+**  
1.332.616  
**15-34**  
462.814  
**PRP 18-54**  
571.950

Sunday, April 19<sup>th</sup>  
episode 7  
*Verlies je wapen of je eigen  
leven maar nooit je schild...*  
OUT: Christian, 26 y.o.

ratings #:  
**4+**  
1.349.669  
**15-34**  
408.837  
**PRP 18-54**  
541.691



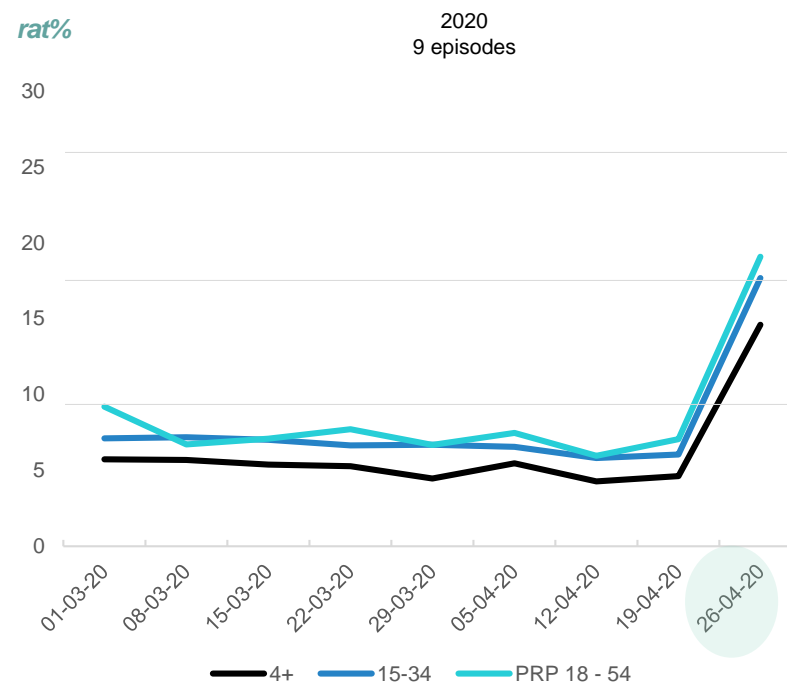
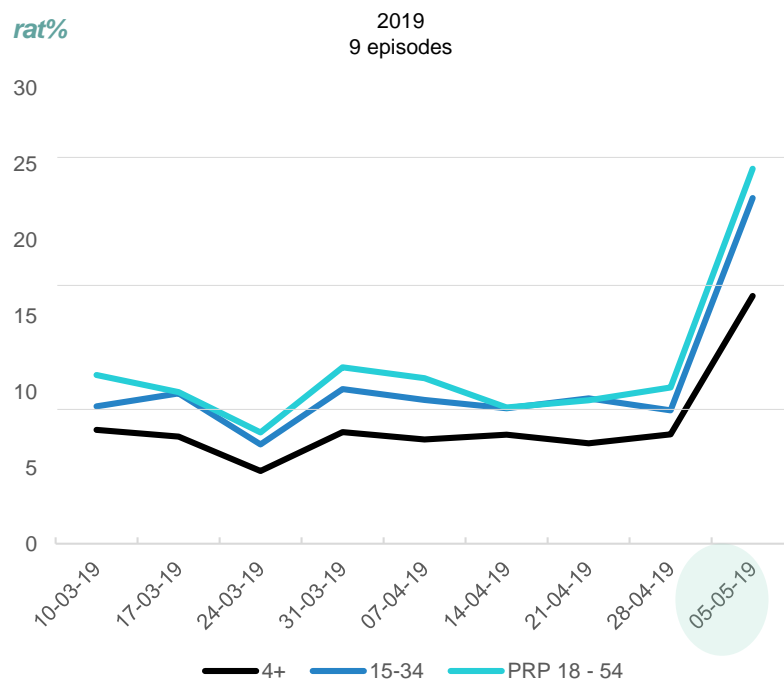
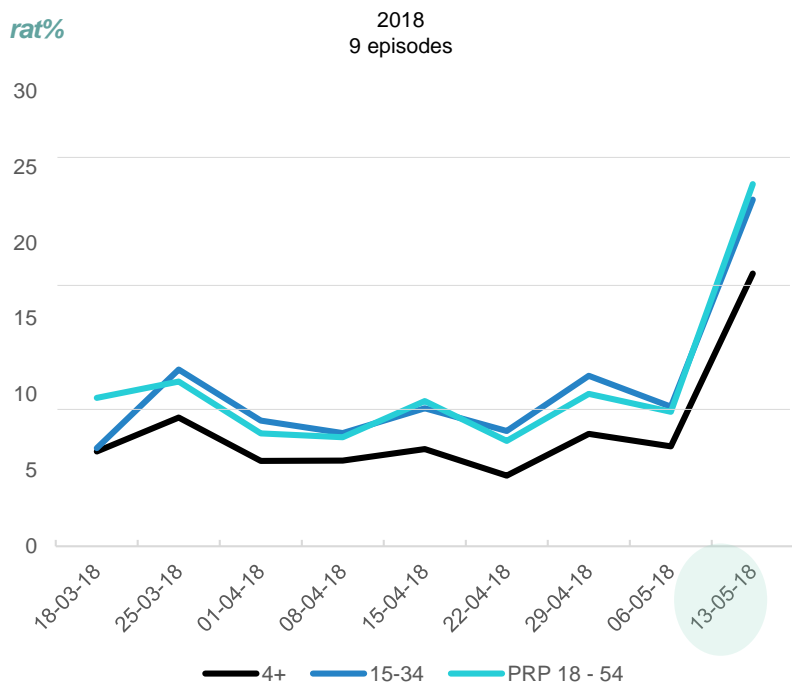


# FINAL OF *DE MOL* BOOSTS *CAFE DE MOL*

## NORMALLY, THE TALKSHOW IS LAGGING BEHIND BUT NOT TO COMMENT THE FINAL



In contrast with *De Mol*, *Cafe De Mol* talkshows following the main program sees its global ratings decreasing year after year on all targets. But every year, audiences skyrocketed thanks to the final episode of *De Mol*.





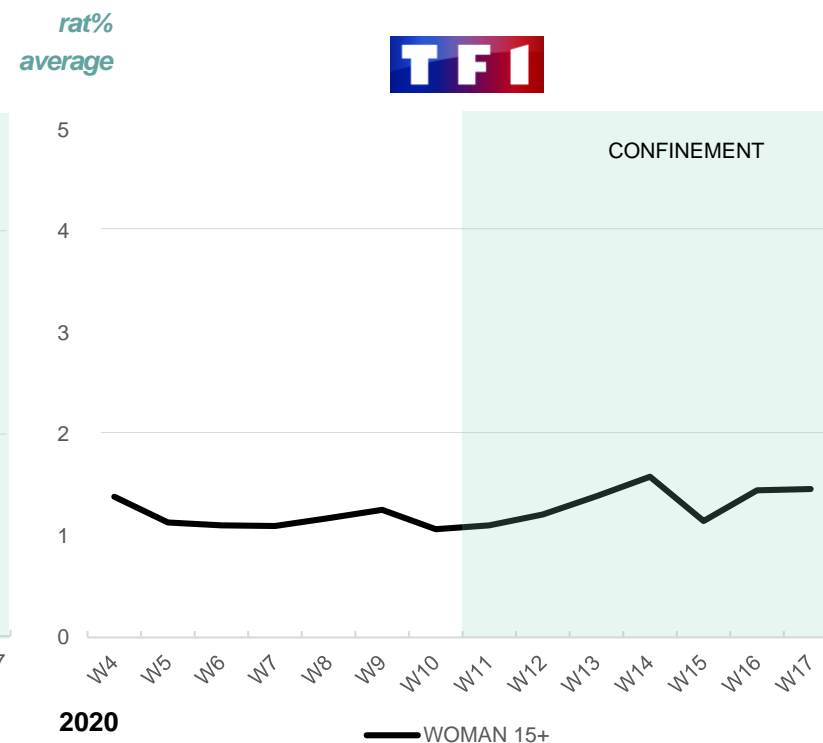
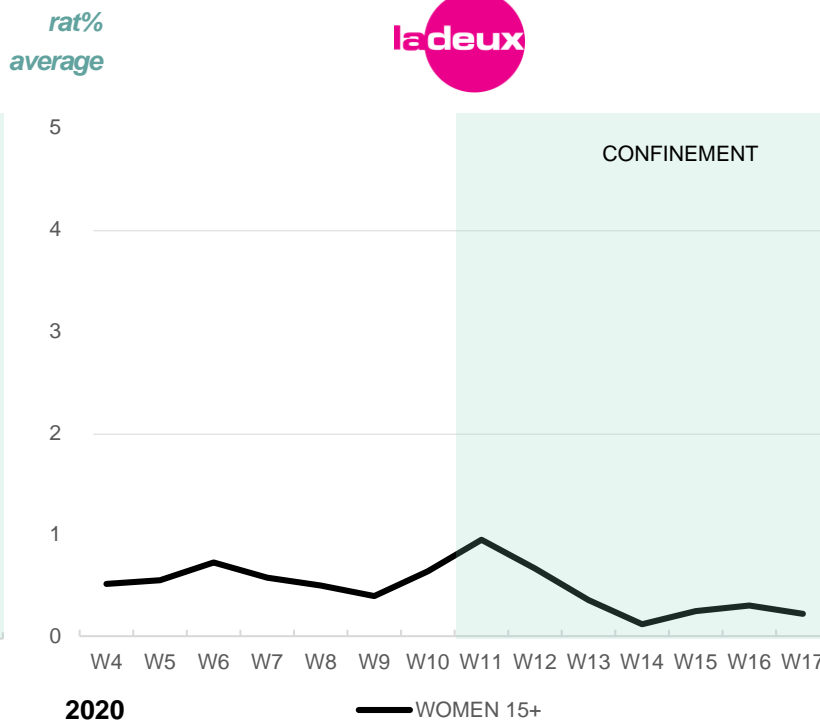
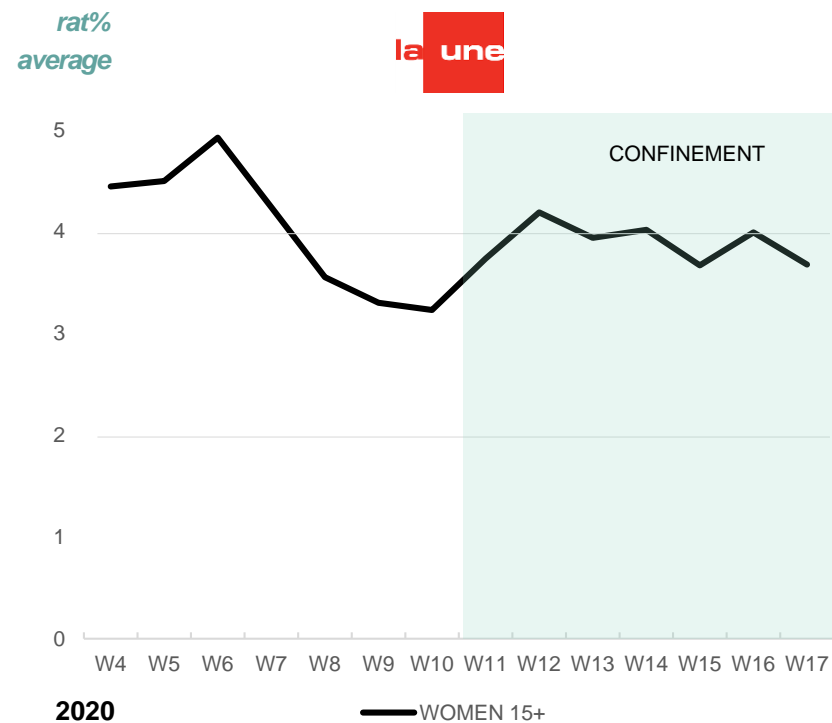


# SOME REST FOR *LES FEUX DE L'AMOUR*

## COVID-19 CRISIS SLIGHTLY IMPACTS AUDIENCES

Only once in its 47 years of existence, the serie *Les feux de l'amour* (*The Young and the Restless*) was not broadcasted in the US. Today marks the second stop of the soap making in the US. This could have an impact on broadcasting in Europe. In Belgium, the show is aired on *La Une*, *La Deux* and *TF1* with delayed timings compared to the US. Despite low average ratings, it seems that the crisis has slightly impacted the audience. Especially, on Women 15+.

Diffusé depuis 1973, la série «*Les Feux de l'amour*» subit un coup d'arrêt inédit (vidéo)  
CBS n'a plus d'épisode inédit en magasin. L'impossibilité pour les doubleurs de se réunir en studio pourrait impacter la diffusion francophone.







# NEWS FROM THE MEDIA: SBS UPGRADES PAUZEKNOP

## LAUNCH OF PAUZEKNOPRECLAME 2.0



- **FIXED # OF IMPRESSIONS BASED ON BUDGET**
- **EXTRA TARGETING OPTIONS: CHANNELS, DAYS, TIMESLOTS**
- ...





BRAND  
OPTIMISM

# TAKING A STEP AWAY FROM THE CORONA

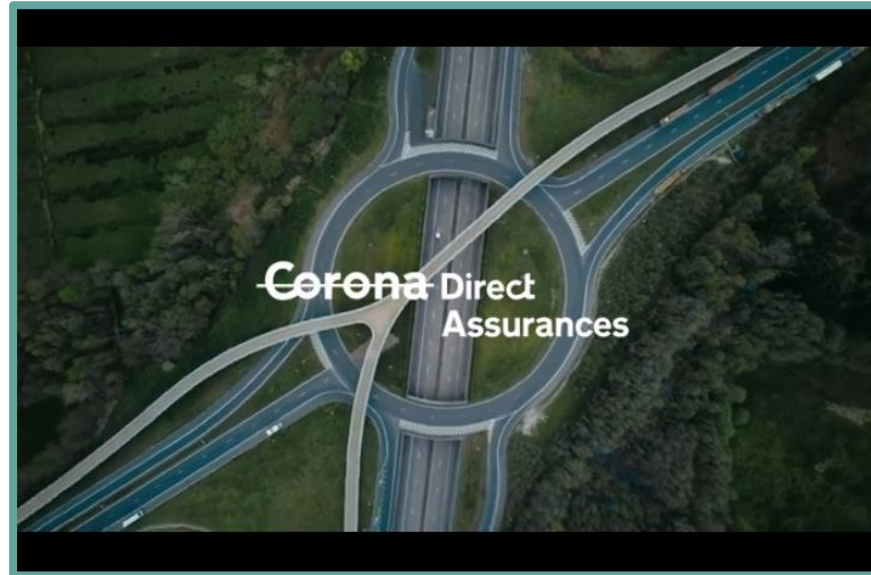
Bold dissociation of the brand from the virus

**CORONA DIRECT** has temporally changed its name to distance itself from the virus

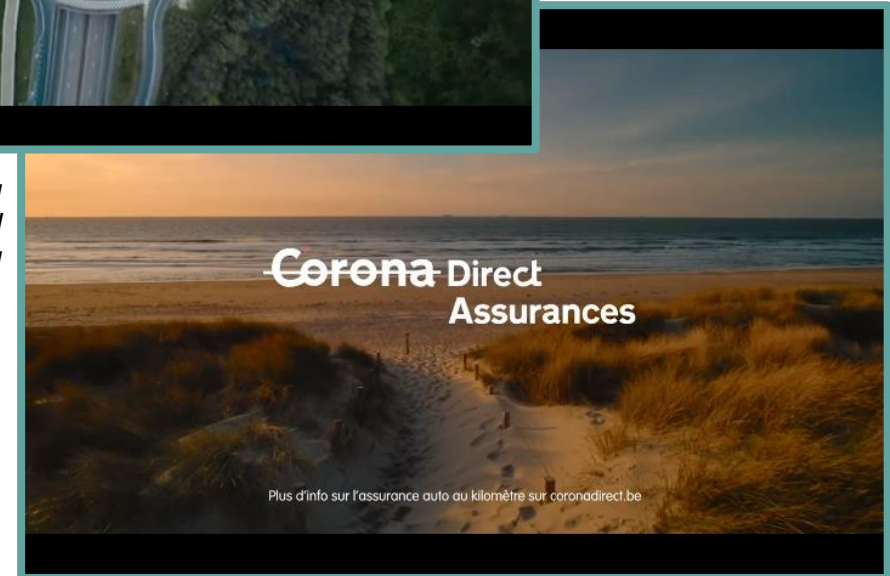
In a video shared on all their owned media, Corona Direct Assurances shows its support to the Belgian population (4.000.000€ refunded to their customers) through a honest and emotional video (creative agency: *Kunstmaan Accenture Interactive*).

**Corona**  
direct

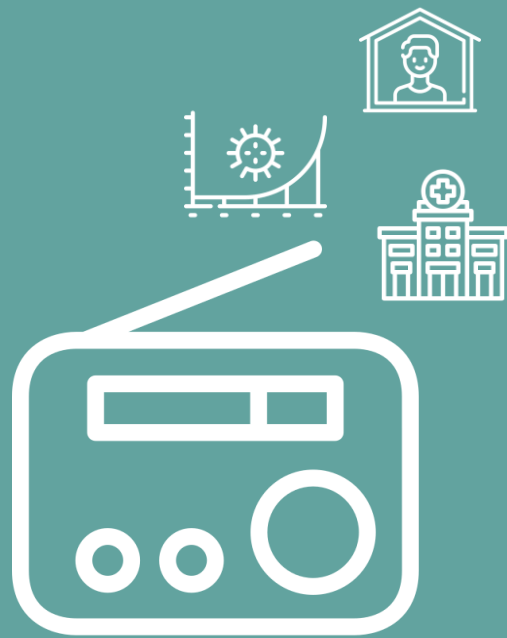
dissociation



*After the social distancing  
comes the brand  
distancing*







# RADIO

Radio listening before COVID-19...  
Exactly, the new CIM RAM is fresh  
from the press!

With the suspension of the current field  
of the audience survey- press faces the  
same issue - it looks like this should be  
the time for researchers to think about  
how we, media professionals, will deal  
with the effects on COVID-19 on  
audience measurements in the coming  
months.

But first, let's celebrate the winners of  
the new edition of the Radio Audience  
Measurement by taking a break with  
#Gamelab.





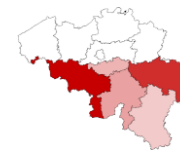
# THE LAST CIM RAM\* IS OUT!

Good news: every media sales house wins 🤗

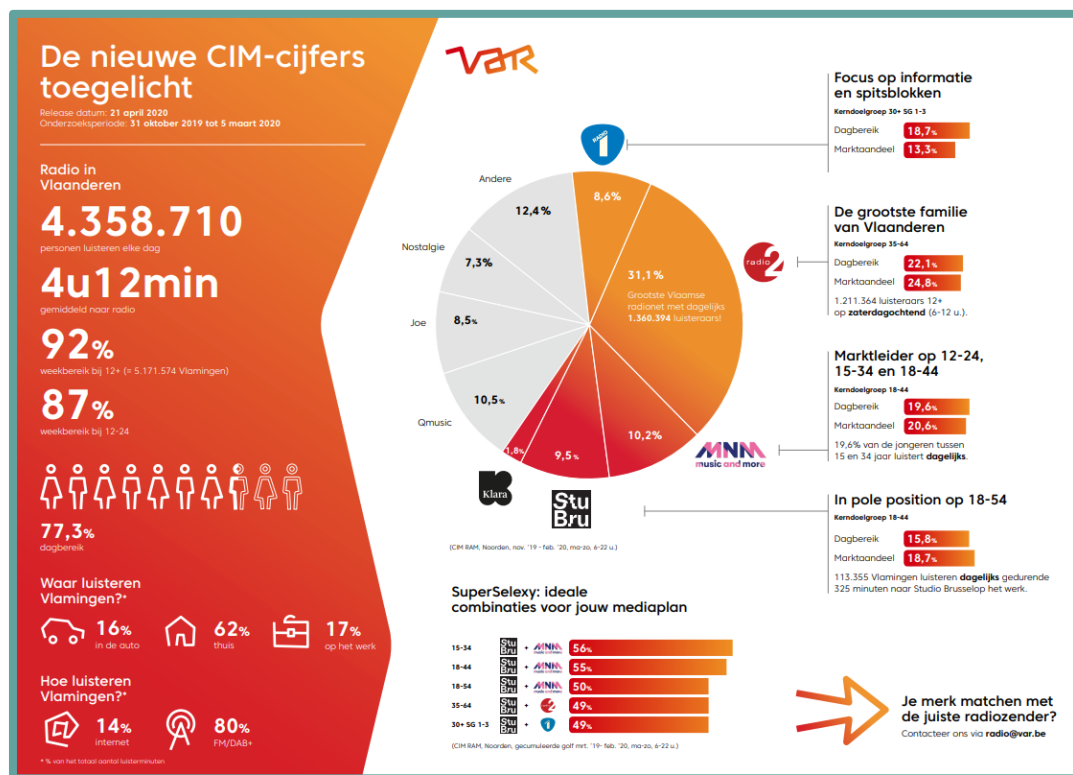
NOTE:  
DUE TO COVID-19  
CRISIS,  
THE NEXT CIM RAM  
STUDY IS SUSPENDED



\*PERIOD: NOVEMBER 2019 – FEBRUARY 2020



## CIM radio: DPG Media-radiozenders bereiken wekelijks 1 op 2 Vlamingen





BRAND  
OPTIMISM

# STUBRU ENTERTAINS ALL GAMERS

New sorts of disruptive content are emerging

## #Gamelab

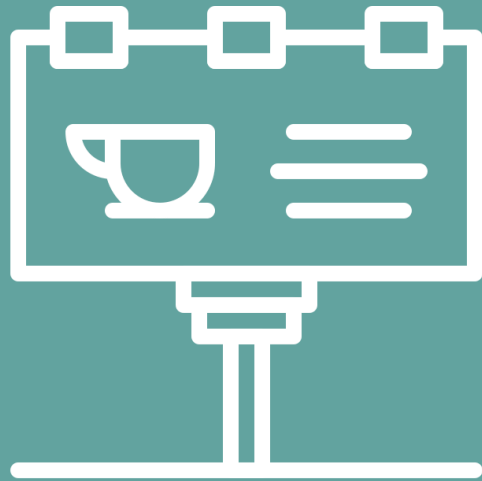


*Sex education through video games*

StuBru has also noticed the immense popularity of gaming and started a new online show called gamelab, where Bouba Kalala, William Bouva and Eva Mundorff talk about the latest facts, fresh from the gaming world. With a new episode each Wednesday.

**Go check it out if you want to see William Bouva give sex education through a minecraft-created vagina!**





## OUT OF HOME

Outdoor could be the next big visual playground for brands as it allows creativity (impactful formats, animations, ..) & technological solutions (geotargeting, link with QR codes, ...).

There's an expected shift to local travel as important travel destinations like Spain consider restricting borders by this Summer.

A big opportunity for retail & local brands to build proximity & familiarity with Belgians.

Find some compelling evidence and inspiration in this chapter.





# OUTDOOR IS THE NEW VISUAL PLAYGROUND

Motion, impactful formats, geotargeting, ... enough variety

1

## “CORONANIMATION”

Collaboration between OOH actors to provide short animations concerning main measures against COVID-19

outsight

WUNDERMAN  
THOMPSON

JCDecaux

publifer®

Lijncom



## SOCIAL NETWORK STREET

2

Launched in 2014 by a group of visual and written artists, **Dysturb** presents contemporary global issues in an innovative way, using the most basic of social networks : the streets.

Dysturb is committed to the fight against Covid-19 through an information and awareness campaign in the form of large format urban displays in New York and in Paris.







# SUMMER 2020 = THE GREAT LOCAL ESCAPE FOR OOH

Brands should take advantage of the expected shift to local travel

## THE WISH TO GO OUT

- 1 **47%** Young adults definitely will go out once the lockdown has ended. 50+ers are the less interested in going out (20%).

## MEANINGFUL MESSAGE

- 2 OOH offers a unique window where brands can deliver relevant value during periods of anxiety.  
**40%** of the respondents surveyed in the Consumer Sentiment survey of Havas Belgium expect **information about and evidence of compliance with health standards** from retailer brands. Reassurance is key.



## (D)OOH = OPPORTUNITY SUMMER 2020

- 3 **80%** of Belgians who intended to buy travel services before the lockdown, have postponed their travel plans during the lockdown.  
The expected shift to local travel and more day trips is a great opportunity for brands to build awareness and gain attention this Summer using (D)OOH solutions

Sources:





# BELGIANS EXPLORE THEIR NEIGHBORHOOD BY BIKE

## And that's why soft mobility takes advantage from lockdown

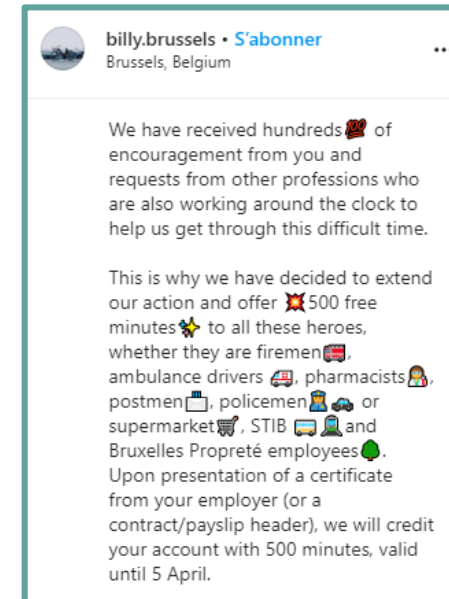
### Billy on top

The shared bike company observes a change in the mobility behavior. The lockdown is a unique opportunity to convert people to soft mobility in Brussels.

That is why the Brussels Minister of Mobility, Elke Van den Brandt, defined a plan for mobility to plan the exit strategy in a smoother way by extending the Brussels bike path of 40km.



The usage of Billy bikes increased by 100% compared to previous months while the total number of trips dropped by 70% in Brussels.



Bien que le nombre total de déplacements à Bruxelles a chuté de plus de 70%, l'utilisation des Billy a doublé depuis le début du confinement. "Comparé aux mois précédents, nous observons une augmentation de 100% de l'utilisation de nos 600 vélos ainsi que du nombre d'inscriptions au service", explique le CEO.

*Billy is socially engaged and extend its special offer to other daily heroes.*

La Libre

### Proximity brands

People stay closer to home, the interest for geo-targeted ad services for retail chains should increase even after the lockdown (= cfr Summer 2020)



# HUNTING EYEBALLS WITH HUMOUR

## Harvesting (earned) media attention

Crisps search audience **EMILY  
CRISPS**

**Ads** Ads of the World commenting the first ever outdoor media campaign in United Kingdom this April:

“Emily crisps decided to run their first ever outdoor media campaign. This April. Just as lockdown had happened. Ouch. But instead of crying into their crisps they turned it to their advantage and went for the parody option.”







# SPONSORSHIP

Sport leagues and competitions everywhere have been forced to postpone games.

And in the meantime, an earthquake shaken up our football country : historical sponsors of major Belgian football clubs have announced the end of their partnerships.

An era comes to an end. Alternatives must be found and streaming & gaming are one of these.





# MAJOR SPONSORS LEAVE BELGIAN FOOTBALL

Historical sponsor(s) of football club ended their partnership

40 YEARS OF SHIRT SPONSORSHIP IN A GLIMPSE:



*The historical partnership between BNP Paribas Fortis and FC Anderlecht seems to come to an end*



proximus

Football Club Anderlecht, FC Bruges and SC Charleroi lost their partnership with Proximus. Another important and historical sponsor of the Belgian football



OUT ↓



proximus

IN ? ↑



Au moment où les conséquences financières de la pandémie du Covid-19 sont encore incertaines, Anderlecht, le Club de Bruges et le SC Charleroi doivent faire face à une défection de taille. Partenaire majeur de ces trois clubs, Proximus a décidé de réorienter sa stratégie et de ne pas renouveler le contrat qui arrivait à terme à la fin du mois de juin.

LE SOIR



## BRAND OPTIMISM

# SPONSORSHIPS NEED TO REINVENT THEMSELVES

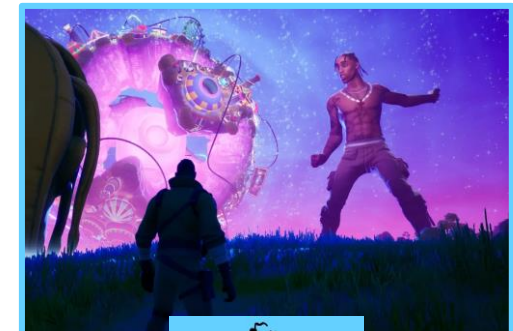
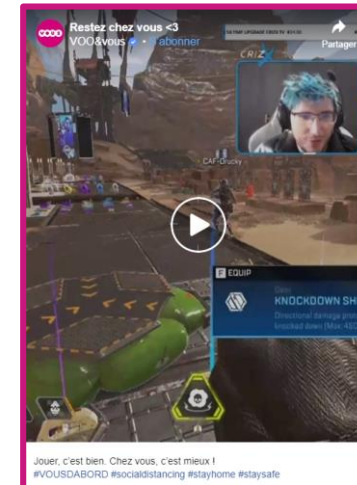
## Events are cancelled but brands & media are creative!

TV channel VIER has organized a sport show with famous Belgian athletes to cope for the lack of sport events.

With all the cancelations of sport events, sport has lost lots of visibility. This show proves that new contents can be created in order to temporarily replace the big “cup” competitions.

Video games are also an alternative for brands. Twitch's audience increased (+60% of viewing compared to the first weeks of 2020 and 1M2 actors in Belgium). Ex: VOO, Travis Scott x Fortnite.

Heptathlon competition organized with Belgians athletes



FORTNITE



BRAND  
OPTIMISM

# >12M LIVE VIEWERS FOR TRAVIS SCOTT'S FORTNITE SHOW

Which broke the record of the first ever Fortnite concert by Marshmello

Travis Scott's first Fortnite concert was surreal and spectacular

The 12 million participants did not include **over 3 million views on streams.**

On Monday and Tuesday, **Scott streams increased by 26%**, with some hits (like "Stargazing") jumping over 50% ahead of the Fortnite show.

The 10-minute performance, which has received rave reviews from players on social media, ended with **a new track**, The Scotts, a collaboration with rapper Kid Cudi.

“

*Honestly, today was one of the most inspiring days. Love every single one of u guys. And I know times are weird for us. But for one moment to be able to have ragers to rage where ever you are is amazing. – Travis Scott*

”





# BRAND OPTIMISM

Our Mission at Havas is to **make a meaningful difference** to brands, businesses and people.

Ending our communication out of fear of being seen as opportunistic is not an option.

We need to **look for the pain points where brands can make small changes that really help.**

Optimism for ourselves and our brands in times of COVID-19 **#Brandoptimism** is our new motto. Inspiration for the optimists!



**BRAND  
OPTIMISM**

# SUNNY DAYS WILL COME BACK

Stay in your consumer's mind now and in the future

**DEVOS LEMMENS has been there for 130 years and will stay there to bring savors in your family & friends reunions!**

The crisis forces us to avoid social interactions and then to enjoy a good barbecue with our closed ones. But ~~social~~ physical distancing is necessary for everybody's health and we need to remember that it won't last forever.

Devos Lemmens's campaign is broadcasted on TV, radio and digital media.



*Chers compatriotes belges,*

Nous sommes à votre table depuis 130 ans.

Une table autour de laquelle on a partagé beaucoup de savoureux moments.

On a partagé vos agréables barbecues, vos dîners de famille et même vos premiers tête-à-tête. On a partagé vos belles histoires, touchantes et rigolotes et parfois même vos chaudes confessions.

Mais ce que nous vivons et partageons en ce moment, c'est la première fois depuis 130 ans.

En raison de ces circonstances exceptionnelles, on va avoir très difficile de partager la même table et d'apprécier tous ces bons moments avec nos amis et notre famille.

Et c'est bien sûr très dommage. Mais, ça ne va pas durer. Alors, pour une fois, on laisse nos blagues habituelles un peu de côté.

Pour une fois, nous ne vous invitons pas à faire chauffer les saucisses. Mais à rester au chaud chez vous.

Pour une fois, nous ne vous encourageons pas à sortir le charbon de bois. Mais à respecter les personnes qui nous soignent. Et qui, elles, sont sur les charbons ardents.

Et pour une fois, nous ne vous motivons pas à être sauciaux, mais sociaux. Garder nos distances, ça va nous rapprocher. Au sens figuré, bien sûr.

Tenez le coup, valeureux Belges. Bientôt, on sera de nouveau tous ensemble... à taaable.



*Supportive message to all  
Belgians*



Source: Havas Media Belgium Desk Research



## BRAND OPTIMISM

# STAY HOME AND YOU WILL TRAVEL AGAIN

Your consumer's health comes first

**THALYS is inviting people to stay home and wait comfortably until the crisis ends.**

Traveling companies are suffering from the crisis since long distance trips are prohibited. But it is a matter of time before everything gets back to normal and before traveling becomes possible again.

The best attitude is to stay home and keep in mind that the future will be filled with (escape) trips.

Stay in your consumer's mind the right way so when (s)he's ready again, you'll be the first they'll think about!



*#StayHome until better days*





BRAND  
OPTIMISM

# CELEBRATING ALL OUR HEROES

Visibility for all the ones on the frontline

**BNP PARIBAS FORTIS** has launched a campaign to thank all the people working during the **COVID-19** crisis to improve our quality of life.

When the health sector is obviously the one that first comes in mind, many other actors allow us to keep living the new normal the best way as possible.

So, "To all who take care of us, huge thank you!"



Creative Agency: Publicis Group Belgium

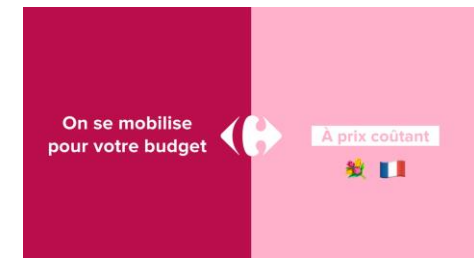
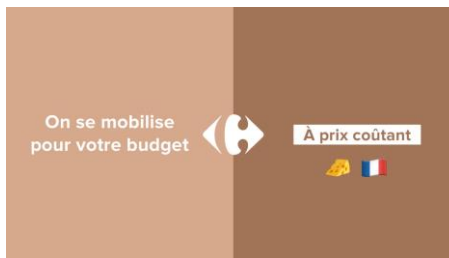


# ENSURING THE AFFORDABILITY OF LIFE

With the crisis Belgians worry more about their budget

Surveys point out that the economical aspect of the current situation is the biggest worry for the Belgian population. The financial aspects of our future everyday life must not be neglected.

This explains that promotions and vouchers are back in the shops.... and in media.





# THE END

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