What the evidence reveals about the true worth of media for brand advertisers

Re-evaluating Media
The Belgian edition

In collaboration with: echo

ebiquity

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Introduction

In March 2018 Ebiquity published the Re-evaluating Media study – the most in-depth review ever of the value of different media in the UK.

Described by marketing professor and columnist Mark Ritson as a ***"signature source of data"*** and praised for its ***"rigour"*** and ***"simple elegance"***, the report sparked much attention and debate both in the UK and internationally.[1]

It reinforced Ebiquity's view that advertisers are not getting return on their online investment and that traditional media is undervalued.

In early 2019, VIA, The Belgian Association of Audio Visual Media (formerly ABMA-BVAM) approached us to repeat the study for the Belgian market.

Advertisers in Belgium face not only the challenges of rapid digitalisation but also a highly segmented media landscape due to the country's unique cultural and linguistic diversity.

Applying the same methodology as the UK study, we have carried out an independent, impartial and robust evaluation of the true worth of media for brand advertisers in Belgium.

The study – Re-evaluating Media: the Belgian edition – sets out to:

1. Identify what advertisers and agencies consider to be the most important attributes in delivering a campaign that grows the business in the long term
2. Evaluate how each medium performs against these attributes through a comprehensive review of published research
3. Contrast this with views gathered from interviews with over 100 advertisers and agencies on how they see each medium perform
4. Produce an overall ranking of the relative value of each medium based on the evidence that we have collected
5. Get a sense of where advertisers and agencies see the industry going.

As in the UK, the findings reveal that it is time for the industry in Belgium to re-evaluate media decisions to optimise advertising budgets.

We thank the Belgian advertisers' association UBA for their support with this study and to all our interviewees who generously gave up their valuable time take part.

1. *Marketing Week*, UK, 07/03/18

How the study was done

The Belgian edition of the Re-evaluating Media study was carried out in 2019 in partnership with the team from Echo Research (previously Ebiquity's Reputation and Research practice) who led the 2018 UK study.

Primary and secondary research was conducted using the methodology developed for the UK study.

Primary research

This research was conducted **in collaboration with UBA (Union of Belgian Advertisers).**

Echo Research carried out a total of 103 interviews (81% online and 19% by telephone) between March and May 2019.

- **Advertisers** n=67 marketers and communication experts involved in media decisions, in companies from a range of sectors.
- **Agencies** n=36 agencies including media agencies (n=26), digital agencies (n=5) and creative agencies (n=5).

Interviewees were not informed that the research was commissioned by VIA. All research was carried out in accordance with the ESOMAR Code of Conduct.

Secondary research

We searched over 30 sources and reviewed more than 140 published reports to find supporting evidence on how well a medium performs.

To qualify for inclusion the research study had to be recent (i.e. published since 2010) with a transparent methodology.

We also accessed industry media planning tools for reach and frequency analysis.

Assessing performance on each attribute

In accordance with the UK methodology, scoring criteria were used to rate media performance on each attribute. The approach to this varied depending on the attribute and nature of data available:

- straightforward comparison of data (e.g. reach)
- objective assessment of structural capabilities (e.g. yes, yes with limitations, no)
- score allocated objectively based on combining findings from a range of research studies.

The scoring was applied by Echo and validated by a team of Ebiquity experts.

Full details of the secondary research sources and scoring framework used can be found in the appendices of this report.

The media channels we evaluated

- **Cinema**
- **Direct mail** – addressed mail – this is different from the UK survey that included door drops
- **Magazines** – print
- **Newspapers** – print
- **Online display** – non-video display and banner ads
- **Online video** – all video formats including YouTube and broadcaster VOD
- **Out of home** – all formats – roadside, airports, rail, point of sale etc.
- **Radio** – broadcast
- **Social media** – paid advertising on Facebook, Twitter etc.
- **TV** – all formats excluding online broadcaster VOD

Key takeouts

Evaluating nine attributes that determine the choice of media for a campaign shows a marked difference between what the evidence in Belgium suggests about the performance of certain media and the general market perception based on our interviews with advertisers and agencies.

Advertisers sampled in this survey are spending 46% of their budget on short-term activation versus 54% on brand-building activities.

Targetability stands out as the media attribute considered most important for longer-term business growth. The ability to increase brand consideration and to trigger a positive emotional response are the second and third most important attributes.

Targetability has grown in importance in this Belgium edition compared with the 2018 UK survey. This could be a sign of the growing importance of this attribute (apart from intrinsic market elements).

In the **perception** of advertisers and agencies, social media and online video perform best on the combined attributes, followed by radio and TV. When looking at the **evidence** from more than 140 studies, TV and radio are the best performing media, while online video and online display are the weakest performers. This matches what we found in the UK.

Today, most traditional media (television, out of home, direct mail, newspapers and magazines) are undervalued by advertisers across the factors we analysed. They overrate the value of online video and social media.

There is a clear disconnect between the level of investment in certain digital media lines in the Belgian market and the value it delivers. Re-evaluating the media mix could help advertisers achieve better long-term growth.

Context: media investment

Pressures of short-termism evident among our sample of advertisers

We interviewed 67 advertisers for this study. The sample includes a good cross section of Belgian advertisers with all sectors represented including FMCG, retail, automotive, telecoms, public sector, financial and professional services.

Our sample includes advertisers both small and large. Two-thirds of our interviewees were from organisations whose 2018 gross media spend was under €5 million, while a third spent over €5 million.

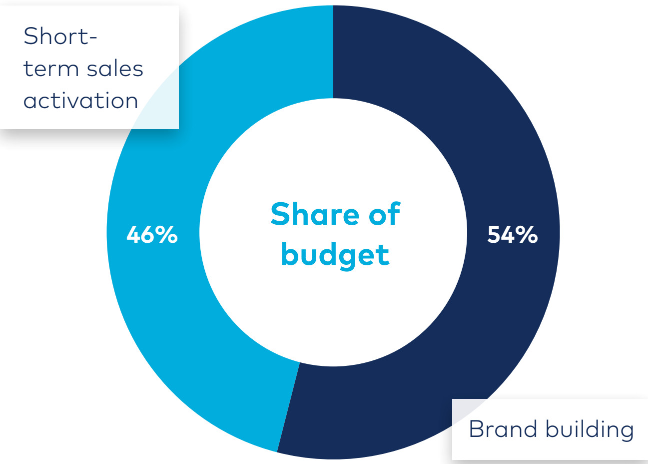
Short-term sales activation versus brand building

In our sample of advertisers, about 46% of advertising budget is attributed to short-term sales activation. This is more than the 40% recommended[2] for maximum effectiveness but no surprise in an era of increasing short-termism.

Digital versus traditional spend

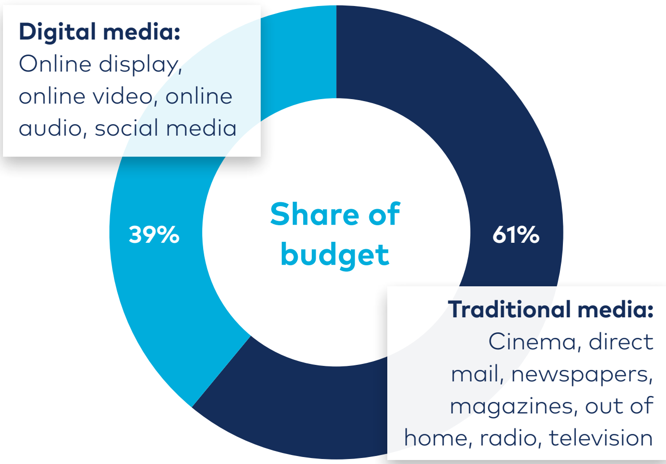
Digital media accounts for 39% of media budgets among our sample of advertisers, which is close to the actual market total of 40%.[3]

Short-term sales activation versus brand building



Q. Approximately what proportion of your advertising budget is spent on brand-building activity versus short-term sales activation?
Base: advertisers n=67

Traditional media versus digital media



Q. What is the approximate share of your budget allocated to traditional media versus digital media?
Base: advertisers n=67

2. Les Binet and Peter Field, *Media in Focus: Marketing Effectiveness in the Digital Era*, IPA, 2017
3. BAM Matrix Wave 9

Context: targeting

Definition of targeting is complex

As 'targeting the right people at the right place at the right time' came out on top of the ranking in the UK, we expected it to be important in Belgium as well.

But what do we really mean by the 'right people in the right place at the right time'?

To understand this in more detail we asked our interviewees to rank the different targeting elements that were scored in the UK survey (geography, day of week/time of day, demography, addressability and context). We added one more: intent – those who are considering or are ready to consider a purchase.

With context and intent topping the ranking, relevance is clearly the defining factor.

It is the new dynamic world where the 'right people' are now described by what they do, rather than who they are.

Addressability and demographic are next in line.
A more personal approach is preferred, but we need the information (and the media) to talk to the right person.
A broader demographic approach is the alternative.

Geography and time of day/day of week are least important and are more instrumental. They are often an extra layer in the definition of a specific target.

Most important targeting routes

1. **Context**
2. **Intent**
3. **Addressability**
4. **Demographic**
5. **Geographic**
6. **Day of week/time of day**

Q. How important is it to you that a medium is able to target audiences in the following ways? Please rank the types of targeting in order of importance to you. Base: n=103

Media attributes to grow your business results

Which attributes are considered to be most important to grow your long-term business results and which media best meet those requirements?

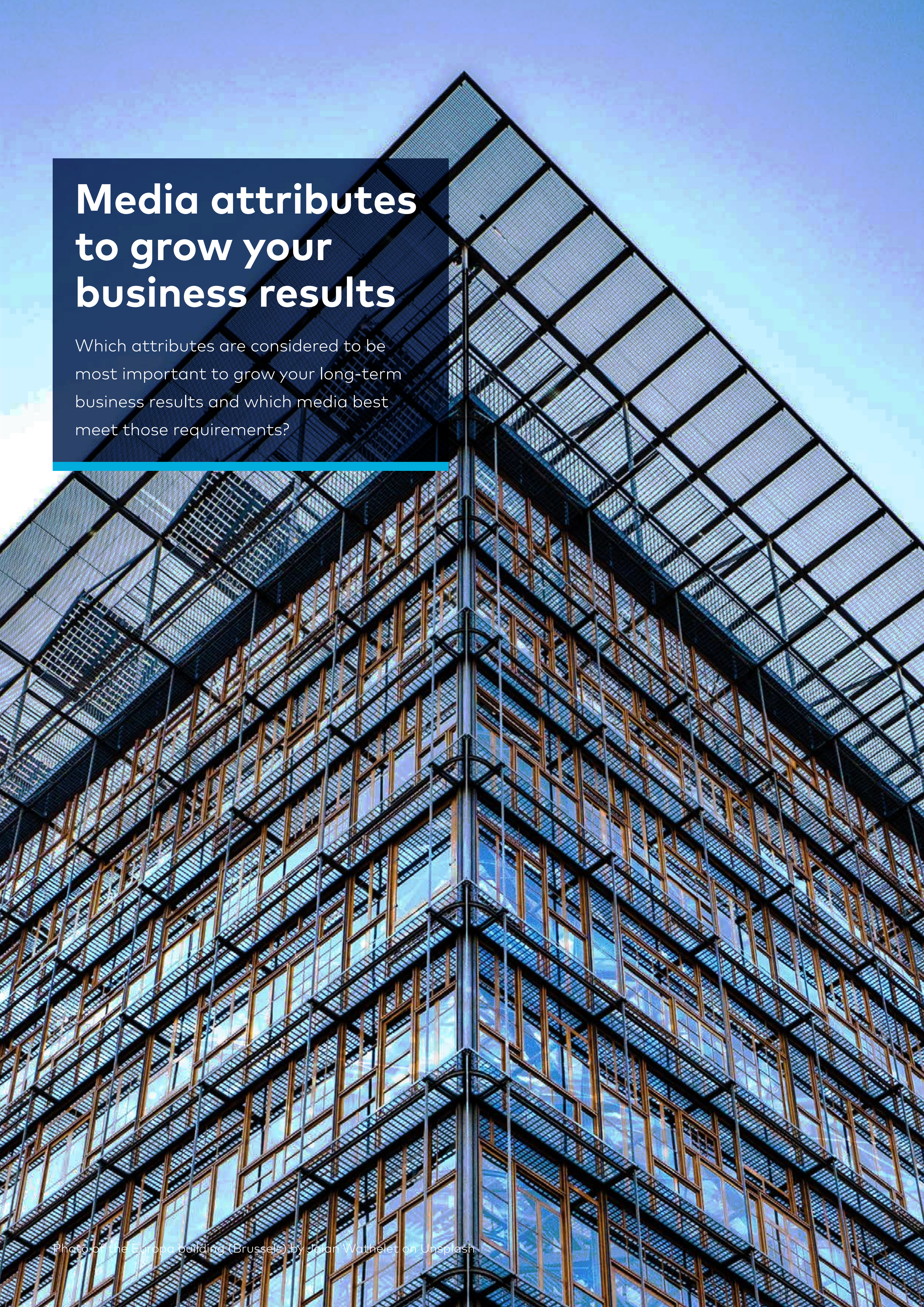


Photo of the Europa building (Brussels) by Jolan Wathelet on Unsplash

Most important attributes of an advertising medium

Targetability is the most important attribute

We evaluated nine attributes that may determine the choice of medium for a campaign that grows the business in the longer term.

We asked our interviewees to trade off the most and least important attributes in a number of different combinations. This analysis, known as MaxDiff, allows us to evaluate the relative importance of each attribute.

In Belgium **targetability** emerges as the most important attribute of an advertising medium, just as it did in the UK study. The surprise was its increased significance with a relative importance index of 337 in Belgium compared with 250 in the UK.

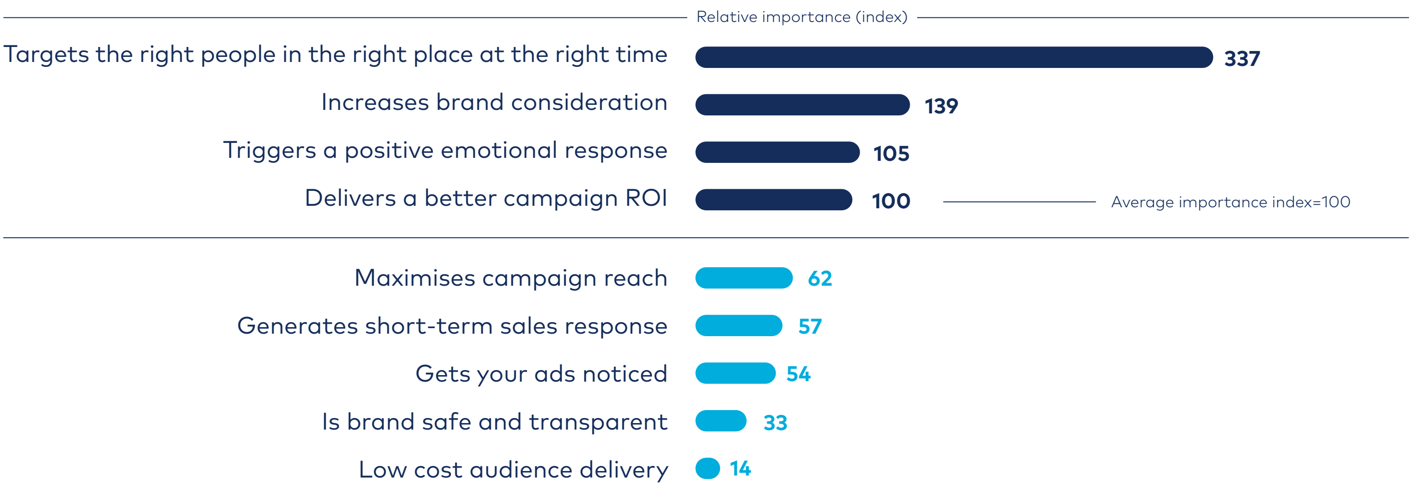
This could be a sign of the growing importance of this attribute over time. But it could also have to do with the (smaller) size and complexity of the Belgian market.

While in the UK it was ROI that ranked second, Belgian advertisers and agencies give more importance to the ability of a medium to **increase brand consideration** and **trigger an emotional response**.

Brand safety and transparency are high on the agenda but are definitely not the first concern when it comes to choosing a medium.

Cost of delivery has the lowest importance when interviewees were forced to make the choice between attributes. Although this seems counter-intuitive, cost is likely to be the last step in the decision-making process, the final filter that makes the process of choosing media iterative.

Most important attributes of an advertising medium



Q. Which of these four attributes is most important and which is least important in delivering campaigns that grow your/your clients' business in the longer term? Base: n=103

How each medium performs against the attributes

To understand how each medium performs against the attributes, we asked interviewees to score the ability of each medium to meet the requirement. This gives us an indication of advertiser and agency **perception** of how the media perform in Belgium.

We also gathered extensive **evidence** from surveys that have been conducted in Belgium since 2010. These findings were used to score the media on the same attributes, in a way that is objective and transparent. When we lack evidence, it is our knowledge of the Belgian and international markets that is used to fill the gap. It uses the same scoring approach we developed for the 2018 UK study and allows us to produce a ranking based on evidence.

Please refer to the appendices of this report (pages 24–38) for full details on the evidence and the scoring applied.

Targets the right people in the right place at the right time

Evidence supports perceptions that social media is best for targeting

Our objective analysis of whether an advertising medium can target audiences by context, intent, demographics, geography, day of week/time of day and addressability puts social media on top.

Advertisers and agencies rate it highest for its targeting ability too.

"Social media gives agencies excellent targeting possibilities and is beating all other channels for reach and targeting audiences and getting them whenever we want."
Media agency

Online video comes second for its good targetability.

"There is lots of data and a lot of audiences watching the videos so lots of choice and content to make sure you get the right people."
Media agency

The most striking mismatch between perceptions and the evidence are television and out of home, which perform much better than interviewees recognise.

With the launch of addressable targeting via set-top boxes, TV targetability in Belgium is improving but clearly some still consider it a blunt instrument: ***"you don't know who in the household is watching it"***. Media agency

Out of home is considered to have ***"too few contextual possibilities"*** and ***"lots of waste"***. Media agency

Targets the right people in the right place at the right time

What the evidence says

1	Social media (paid)	8.3
2=	Online video	7.5
2=	Online display	7.5
4	Direct mail	6.7
5=	Television	5.8
5=	Radio	5.8
7	Out of home	5.0
8=	Cinema	4.2
8=	Newspapers (print)	4.2
10	Magazines (print)	3.3

EVIDENCE Score based on whether a medium can be bought by geography, demographics, day of week, time of day, context, intent or addressably (each scored 0–2 where 0=no, 1=yes with limitations, 2=yes). See Appendix 2 for full details on how this ranking has been calculated.

What advertisers and agencies say

1	Social media (paid)	4.2
2	Online video	4.0
3	Direct mail	3.7
4	Online display	3.4
5=	Radio	3.1
5=	Magazines (print)	3.1
7=	Cinema	2.8
7=	Television	2.8
9	Newspapers (print)	2.7
10	Out of home	2.6

PERCEPTION Mean score. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to target the right people in the right place at the right time. Base: n=24

Increases brand consideration

Advertisers rate AV media for getting a brand top of mind

When it comes to building long-term brand equity and getting a brand thought about in a buying situation, our interviewees consider the moving image as most powerful. This applies especially to cinema and television, and justly so, as Ebiquity's evidence confirms.

"The image has taken precedence over the words. It has become the language of the under 35s. Video can offer a mix of emotion and information that generates meaning, helps strengthen or build trust in the brand and increases the preference." Media agency

For this reason, they rate online video highly too – but it is overrated according to the evidence where proof is lacking.

But interviewees underestimate the power of magazines. On the evidence from studies by Mediahuis, Custo, DPG Media and IP Belgium among others, magazines rank in second place after TV for brand consideration.

Advertisers and agencies also underrate newspapers.

"A newspaper is fleeting and expires after a day. Moreover, you are among a lot of other advertisements, and you have less chance of being seen." Advertiser

Increases brand consideration

What the evidence says

1	Television	10
2	Magazines (print)	9
3	Cinema	8
4	Newspapers (print)	7
5	Radio	6
6=	Direct mail	5
6=	Out of home	5
8	Online video	4
9	Online display	3
10	Social media (paid)	2

EVIDENCE Secondary research on brand consideration. Scoring based on strength of evidence and average rank from comparative studies. See Appendix 2 for full details on how this ranking has been calculated.

What advertisers and agencies say

1=	Cinema	3.9
1=	Television	3.9
3=	Online video	3.7
3=	Radio	3.7
3=	Social media (paid)	3.7
6=	Out of home	3.2
6=	Direct mail	3.2
8	Magazines (print)	3.1
9=	Online display	2.9
9=	Newspapers (print)	2.9

PERCEPTION Mean score ranked on 2 decimal places. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to increase brand consideration. Base n=23

Triggers a positive emotional response

Cinema and magazines have the power of seduction

Our objective evaluation of an extensive body of published research shows cinema and magazines as the best places to generate brand love and the least likely to generate a negative reaction through annoyance and irritation.

Advertisers and agencies agree. In their minds there's simply nothing better than cinema for the ability to stir the emotions – positively.

"Cinema is most impactful as the sound and visual impose no distraction. The audience is fully focused on what is to come and it's the highest possible medium to make a huge impact." Media agency

Magazines, like cinema, offer a qualitative environment where the reader has made a positive choice to read a magazine.

"The 'me-time' we devote to reading a magazine, the involvement we put into the reading moment...is in itself a good context for generating positive emotions." Advertiser

There is good evidence that television advertising creates an emotional connection but this is counterbalanced by the irritation and annoyance levels seen in a number of studies – hence its lower score. This same reasoning was behind the lower ranking for online video and online display on this attribute.

"Online display is often perceived as intrusive and can therefore have the opposite effect on the viewer." Advertiser

Triggers a positive emotional response

What the evidence says

1=	Cinema	8
1=	Magazines (print)	8
3=	Direct mail	7
3=	Newspapers (print)	7
3=	Out of home	7
6=	Radio	6
6=	Television	6
8	Social media (paid)	2
9=	Online display	1
9=	Online video	1

EVIDENCE Secondary research on emotional connection and non-interruptive seamless experience. Scoring based on strength of evidence and average rank from comparative studies. See Appendix 2 for full details on how this ranking has been calculated.

What advertisers and agencies say

1	Cinema	4.6
2	Television	3.9
3	Magazines (print)	3.4
4=	Out of home	3.3
4=	Radio	3.3
6	Online video	3.2
7	Social media (paid)	3.1
8	Newspapers (print)	2.9
9=	Direct mail	2.4
9=	Online display	2.4

PERCEPTION Mean score ranked on 2 decimal places. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to trigger a positive emotional response. Base n=22

Delivers a better campaign ROI

TV and radio top for return on investment

There is a distinct lack of recent published evidence assessing return on investment (ROI) in Belgium. We based the evidence scores on our knowledge of the market informed by our econometric modelling work – but we did investigate the work that was done some time ago by Medialaan, IP, JCDecaux and Clear Channel Belgium.

On this basis, TV and radio are best for delivering return on media investment. Belgian interviewees somewhat agree, but still have a marginal preference for online video and social media.

"TV has such a large reach and, like online video, it provides a very attractive visual message so really helps deliver a campaign and get a return." Media agency

For radio ***"Production and media costs are limited compared to the positive effect."*** Creative agency

"Social media really works – it is not high cost and yet reaches our target audience and translates to sales." Advertiser

Yet there is no robust evidence available to prove a good ROI for social media. It seems to be overrated by advertisers and agencies.

Delivers a better campaign ROI

What the evidence says

1	Television	10
2	Radio	9
3=	Newspapers (print)	7
3=	Online video	7
5	Magazines (print)	6
6	Direct mail	5
7=	Online display	4
7=	Out of home	4
7=	Social media (paid)	4
10	Cinema	3

EVIDENCE Ebiquity knowledge. Scored from high to low. See Appendix 2 for full details on how this ranking has been calculated.

What advertisers and agencies say

1=	Online video	3.9
1=	Social media (paid)	3.9
3=	Radio	3.8
3=	Television	3.8
5	Direct mail	3.5
6	Online display	3.2
7	Out of home	3.1
8	Newspapers (print)	2.9
9=	Magazines (print)	2.8
9=	Cinema	2.8

PERCEPTION Mean score ranked on 2 decimal places. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to deliver better campaign ROI. Base n=21

Maximises campaign reach

Traditional media top for reach

This attribute is focused on delivering broad reach for an 18–64 year-old target audience (for specific targets we would refer to the targetability attribute).

Both the potential reach (using monthly medium reach as the metric) and comparable campaign reach were scored.

For reach, advertisers and our evidence agree, radio, TV and out of home are the media of choice.

Radio offers ***"an easy spread of reach across different population groups."*** Advertiser

"People watch TV more than three hours a day so it touches most households. Even today it is still the most penetrating media." Media agency

"My experience [with out of home] is that you can reach a huge amount of people in a relatively short period of time to introduce a new brand." Advertiser

Magazines score low on perception but are still able to reach broad targets as the evidence shows.

Online display has the potential to deliver wide reach, but it is hard in practice as it is highly fragmented.

Maximises campaign reach

What the evidence says

1	Radio	10
2=	Television	9
2=	Out of home	9
4=	Magazines (print)	7
4=	Online display	7
4=	Social media (paid)	7
7	Direct mail	6
8=	Newspapers (print)	5
8=	Online video	5
10	Cinema	3

EVIDENCE Score based on medium reach and advertising reach using data from media planning tools. See Appendix 2 for full details on how this ranking has been calculated.

What advertisers and agencies say

1=	Television	4.3
1=	Radio	4.3
3	Out of home	4.0
4	Social media (paid)	3.6
5	Online video	3.5
6	Newspapers (print)	3.2
7=	Direct mail	3.1
7=	Online display	3.1
7=	Magazines (print)	3.1
10	Cinema	2.5

PERCEPTION Mean score ranked on 2 decimal places. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to maximise campaign reach. Base n=23.

Generates short-term sales response

Radio stands out for short-term sales impact

Radio comes into its own when short-term sales response is needed, both on the evidence and in the minds of advertisers and agencies. They confirm it is particularly effective in Belgium.

"Radio allows us to have a very wide, fast, very strong and reactive reach. It's the number 1 choice here to generate a short-term sales response." Advertiser

Advertisers and agencies agree with the evidence that direct mail is valuable as a sales-response tool: ***"info, promotions, coupons…everything to generate the drive to the store is possible."*** Advertiser

Social media is perceived by advertisers to deliver short-term impact also, although there is little published evidence to support this.

"Social media has delivered more and more impulse purchases in recent years." Advertiser

To some surprise, newspapers are poorly rated by interviewees whereas evidence from IP Belgium, DPG Media, Newsworks and VAR shows that they generate purchase intent.

Generates short-term sales response

What the evidence says

1	Radio	10
2	Television	9
3=	Direct mail	7
3=	Newspapers (print)	7
5	Out of home	6
6=	Magazines (print)	4
6=	Online display	4
6=	Online video	4
6=	Social media (paid)	4
10	Cinema	2

EVIDENCE Secondary research on short-term sales response. Scoring based on strength of evidence and average rank from comparative studies. See Appendix 2 for full details on how this ranking has been calculated.

What advertisers and agencies say

1	Radio	3.9
2	Social media (paid)	3.6
3	Direct mail	3.5
4	Television	3.2
5	Online display	3.1
6	Online video	3.0
7=	Newspapers (print)	2.9
7=	Out of home	2.9
9	Magazines (print)	2.4
10	Cinema	1.9

PERCEPTION Mean score ranked on 2 decimal places. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to generate a short-term sales response. Base n=22

Gets your ads noticed

Advertisers prefer channels that deliver a captive audience

There are a number of ways in which a medium can get your ads noticed. Our research took into account the medium's scale and viewability, its ability to make the ad or brand message memorable and get the audience talking about it, and the extent to which consumers can deliberately ignore or avoid seeing the ads.

On those measures, advertisers and agencies agreed with the evidence that cinema followed by TV and out of home are the go-to channels to get ads noticed, while online display is not.

For cinema ***"the focus of the attendees in the room is on the screen so your message will be seen as well"***. Advertiser

However, online display advertising ***"serves to explain, not to get noticed"***. Media agency

Online video is overrated by interviewees despite the evidence of high ad avoidance levels and viewability issues for all digital formats.

In fact, advertisers rate viewability as the single most important factor in defining premium online advertising.

Gets your ads noticed

What the evidence says

1	Cinema	8
2=	Television	7
2=	Out of home	7
4=	Direct mail	6
4=	Magazines (print)	6
4=	Newspapers (print)	6
7	Radio	5
8	Social media (paid)	4
9=	Online video	2
9=	Online display	2

EVIDENCE Secondary research on ad avoidance, stature and standout, memorability and amplification. Scoring based on strength of evidence and average rank from comparative studies. See Appendix 2 for full details on how this ranking has been calculated.

What advertisers and agencies say

1	Cinema	4.4
2	Television	4.0
3=	Out of home	3.7
3=	Online video	3.7
5	Radio	3.5
6	Social media (paid)	3.3
7	Direct mail	3.1
8	Magazines (print)	3.0
9=	Online display	2.9
9=	Newspapers (print)	2.9

PERCEPTION Mean score ranked on 2 decimal places. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to get your ads noticed. Base n=24

Is brand safe and transparent

Advertisers acknowledge safety concerns around digital

Advertisers' key concern with social and online media is the inability to fully control the surrounding content.

The evidence shows they are right to be wary, with our evidence also rating digital poorly for the ability to deliver fully transparent, third party-verified audience measurement.

Traditional media, by contrast, offer advertisers a highly-regulated editorial environment and established, credible measurement. On top of that, the audience tends to trust these media more.

Online video: ***"You can't control fully where your ads go. There are some checks that can be made and there are some bans on certain topics."*** Media agency

Social media: ***"You do not know in advance what content your brand will end up with, even though you can target the target group."*** Advertiser

Is brand safe and transparent

What the evidence says

1=	Cinema	9
1=	Television	9
3=	Newspapers (print)	8
3=	Magazines (print)	8
3=	Radio	8
6	Out of home	7
7	Direct mail	6
8	Online display	4
9	Online video	3
10	Social media (paid)	2

EVIDENCE Score applied for safety of the editorial and advertising environment and transparency of audience measurement. See Appendix 2 for full details on how this ranking has been calculated.

What advertisers and agencies say

1	Radio	3.9
2=	Television	3.8
2=	Cinema	3.8
2=	Out of home	3.8
5	Magazines (print)	3.7
6	Direct mail	3.6
7	Newspapers (print)	3.5
8=	Online video	3.3
8=	Social media (paid)	3.3
10	Online display	3.1

PERCEPTION Mean score ranked on 2 decimal places. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to be brand safe and transparent. Base n=24

Provides low cost audience delivery

Social media wins on low cost

The actual cost of a medium is defined by various parameters and is different for each case. We have chosen a top-line approach and based our assumptions on the evidence from UMA (United Media Agencies) and our own data for digital media.

Advertisers and agencies align with the evidence and agree that social media offers the lowest cost.

Social media ***"cost per contact is countless times lower than traditional media (with a few reservations about the credibility of metrics)"***. Advertiser

Out of home, radio and online display do well on this attribute also.

"In Belgium, radio advertising is not costly and yet has a really good reach." Advertiser

Provides low cost audience delivery

What the evidence says

1	Social media (paid)	10
2	Out of home	9
3	Radio	8
4	Online display	7
5	Magazines (print)	6
6	Television	5
7	Newspapers (print)	4
8	Online video	3
9	Cinema	2
10	Direct mail	1

EVIDENCE Scored from lowest cost to highest cost based on UMA and Ebiquity data. See Appendix 2 for full details on how this ranking has been calculated.

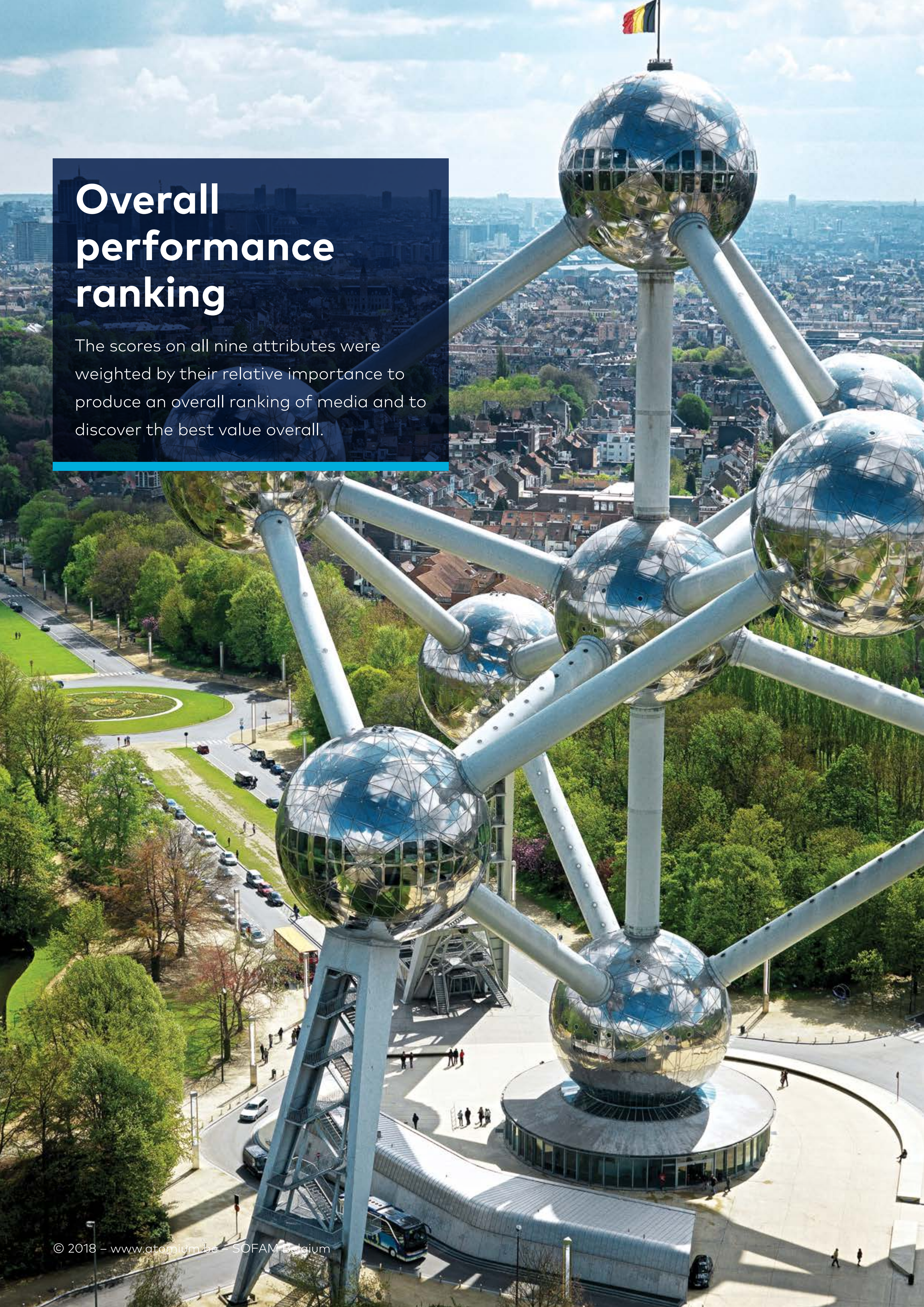
What advertisers and agencies say

1	Social media (paid)	4.0
2=	Online display	3.8
2=	Radio	3.8
4	Online video	3.3
5	Direct mail	3.2
6	Out of home	3.0
7	Newspapers (print)	2.9
8	Magazines (print)	2.7
9	Television	2.4
10	Cinema	2.0

PERCEPTION Mean score ranked on 2 decimal places. Q. Using a scale of 1–5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to provide low cost audience delivery. Base n=23

Overall performance ranking

The scores on all nine attributes were weighted by their relative importance to produce an overall ranking of media and to discover the best value overall.



Overall performance ranking

Combining all the attributes puts TV and radio top

We took all the attributes advertisers look for in media channels and weighted them by their importance, to see which media deliver the best value overall.

Traditional media came out top on the weighted evidence, led by TV and radio.

Most forms of traditional media – television, out of home, direct mail, magazines and newspapers – were underrated by advertisers and agencies.

In contrast, advertisers and agencies overvalue social media and online video, rating them first and second despite the evidence placing them seventh and ninth placing them seventh and ninth respectively.

Online display is also overrated by advertisers and agencies.

Overall weighted score – all 9 attributes combined

What the evidence says

1	Television	68.0
2	Radio	61.7
3	Direct mail	54.8
4	Newspapers (print)	51.7
5=	Out of home	51.5
5=	Magazines (print)	51.5
7	Social media (paid)	47.8
8	Cinema	47.1
9	Online video	46.8
10	Online display	44.5

EVIDENCE Based on sum of scores for all 9 attributes with importance weights applied.

What advertisers and agencies say

1	Social media (paid)	34.0
2	Online video	33.1
3	Radio	31.6
4	Television	30.9
5	Direct mail	30.2
6	Cinema	28.9
7	Online display	28.1
8	Out of home	27.7
9	Magazines (print)	27.5
10	Newspapers (print)	25.8

PERCEPTION Based on sum of mean scores across all 9 attributes with importance weights applied. Base: n=103 (each respondent rated 2 attributes).

Future of media

Distinction between traditional and digital media will blur

We asked our interviewees open questions on the evolution of media in Belgium: 'What does the future hold for media in Belgium? What are the biggest challenges and opportunities for the next few years?'

This is a highlight of what we got in return.

Interviewees see digitalisation accelerating, especially as the Belgian market has been relatively slow to embrace the trend up until now.

But that does not mean they think digital will replace traditional media; rather that the distinction between the two will become increasingly blurred as both up their game in areas where they are weak and broaden their offering, enabling advertisers to combine the best of both worlds.

"The best outcome is to get all the media working together to complement each other." Media agency

To get there, the challenges to overcome include developing better measurement of online advertising and better cross-media measurement methodology, linking online and offline ROI.

"We need to modernise the media mix focussing on other touchpoints, optimising the combination of the media platform with the target audience and this ongoing transition in the next 2–3 years will be key." Advertiser

Advertisers and agencies agree that in an increasingly complex media ecosystem with blurring lines between digital and traditional media, standout creative will be more important than ever before.

"The creative ideas must be relevant if they are to attract the target audience. In fact media buying is definitely secondary now to the creative ideas...From the media perspective, we need more and more to go where the audience is." Advertiser

Media owners must continue to provide local content and offerings, something that is especially important for the Belgian market.

"Important to have local content in order to safeguard the path of the Belgian media." Advertiser

"For the media in Belgium it is knowing how to cope with the major players (Google and Facebook). Using local knowledge, there is a real opportunity. We have a strong national media and good information coming from established companies and their links to TV, radio and telecom companies so we have masses of data to offer an alternative local package." Media agency

Implications of this study – Ebiquity's view

Re-evaluate the media mix

As outlined in this study, there is a misalignment between what the evidence in Belgium suggests about the performance of certain media lines in delivering long-term business growth and the general market perception of their performance.

Each medium has a valuable role to play but advertisers should consider re-evaluating the media mix to ensure they optimise the combination of media for their brand. Belgian audio-visual media such as television and radio came out particularly strongly for brand building.

Broad reach for brand building

Targeting as an attribute has become more important as the media landscape continues to digitalise. There is no doubt that digital media, particularly social, offer unrivalled targeting opportunities.

Our view still stands that for brand building, advertisers should be wary of targeting too narrowly. There is solid evidence from the IPA in the UK that the broader the reach, the more effective the campaign.[4]

More evidence needed

The body of evidence we found for Belgian media is impressive given the size of the market.

One area that is poorly served is Return on Investment (ROI) for the business. The industry in Belgium needs to invest in more research such as marketing mix modelling to demonstrate the effectiveness and efficiency of each medium.

Digital media owners, especially social media, need to publish more research to prove it works.

Monitor brand safety

Advertisers should take ad misplacement seriously to protect brand equity.

Our advice to advertisers is to review current exposure through regular audits and inspections and to keep vigilant.

Localisation

There is strong support from our interviewees for Belgium's national media. From creating engaging local content, to exploiting data to develop cross-media packages, there are many opportunities for Belgian media owners to explore.

4. Les Binet and Peter Field, *The Long and the Short of it: Balancing Short and Long-Term Marketing Strategies*, IPA, 2013

Appendices

Appendix 1: secondary research scoring framework

Attribute	Maximum score	Importance weighting*
Targets the right people in the right place at the right time	**10**	3.37
Increases brand consideration	**10**	1.39
Triggers a positive emotional response	**10**	1.05
Delivers a better campaign ROI	**10**	1.00
Maximises campaign reach	**10**	0.62
Generates short-term sales response	**10**	0.57
Gets your ads noticed	**10**	0.54
Is brand safe and transparent	**10**	0.33
Low cost audience delivery	**10**	0.14

* based on findings from MaxDiff analysis of 103 respondents

Appendix 2: secondary research evidence

Targets the right people in the right place at the right time

Definition:
Ability of the medium to target by
Geography – targeting a specific geographic area, base level is a new CIM habitat
Demographics – targeting specific demographics/specialist audiences
Day of week/time of day – deliver the audience on a specific day or time of day
Contextual – targeting audiences in a specific editorial context
Addressable – ability to deliver customised ads at an individual or household level
Intent – targeting audiences known to be intending to purchase

Scoring criteria:
0 – no you can't buy the medium in this way
1 – yes with limitations
- targeting limited to a small proportion of this medium only
- targeting is not guaranteed/has potential flaws (e.g. basis for programmatic targeting varies from first party data-driven to assumption-based)
- targeting is not as sophisticated as it could be

2 – yes you can buy the medium this way without limitations

Evidence:
How the medium is bought (market fact)

Medium	Geography	Demographics	Day of week/ time of day	Contextual	Addressable	Intent	Total score (weighted/10)
Cinema	2	2	0	1	0	0	**4.2**
Direct mail	2	2	1	0	2	1	**6.7**
Magazines	0	2	0	2	0	0	**3.3**
Newspapers	1	1	1	2	0	0	**4.2**
Online display	2	1	2	2	1	1	**7.5**
Online video	2	1	2	2	1	1	**7.5**
Out of home	2	1	1	2	0	0	**5.0**
Radio	1	2	2	2	0	0	**5.8**
Social media	2	2	2	1	2	1	**8.3**
TV	1	1	2	2	1	0	**5.8**

Increases brand consideration

Definition:	Scoring criteria:	Evidence:
Enhances long-term brand equity and the degree to which the brand is noticed or thought about in a buying situation	0–10, where 10 is strong evidence of the medium increasing brand consideration and 0 is where there is no evidence. Average rankings from comparative studies used to help determine relative placement	Secondary research

Medium	Evidence	Score
Cinema	**Space newsletter Feb 2016: Millward Brown cross media study (2015)** Cinema 1st place/8 for brand salience and 1st place/8 for consideration (Europe incl. Belgium)	8
Direct mail	**Bpost Media: Barometer Survey** Direct mail realises spontaneous brandlift of 18% (>300 cases)	5
Magazines	**Custo: Custometer (2010–2018)** 64% of readers would recommend the brand or products **DPG Media: MIP (2019)** Magazines realise spontaneous brandlift x3 (14 cases) **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** Magazines ranked in 2nd place for 'makes me want to try a new product' **Mediahuis: Connectometer (2014–2019)** 34% of recognisers of magazine ad campaigns would consider the brand **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Magazines 3rd place/8 for brand salience and 2nd place/8 for consideration (Europe incl. Belgium)	9
Newspapers	**DPG Media: MIP (2019)** Newspapers realise spontaneous brandlift of +23% (8 cases) **Mediahuis: Connectometer (2014–2019)** 30% of recognisers of newspaper ad campaigns would consider the brand **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Newspapers joint 4th place/8 for brand salience and 3rd place/8 for consideration (Europe incl. Belgium)	7
Online display	**Space newsletter Feb 2016: Millward Brown cross media study (2015)** Online display 6th place/8 for brand salience and 8th place/8 for consideration (Europe incl. Belgium)	3
Online video	**Space newsletter Feb 2016: Millward Brown cross media study (2015)** Online video 7th place/8 for brand salience and 7th place/8 for consideration (Europe incl. Belgium)	4
Out of home	**Clear Channel Belgium: Cobra (2008–2018)** 37% of respondents seeing an OOH campaign found it 'inciting' **Space newsletter: Millward Brown cross media study (2015)** OOH 8th place/8 for brand salience and joint 4th place/8 for consideration (Europe incl. Belgium)	5
Radio	**DPG Media: MIP (2010–2019)** Radio realises spontaneous brandlift of +71% **Space newsletter: Millward Brown cross media study (2015)** Radio joint 4th place/8 for brand salience and joint 4th place/8 for consideration (Europe incl. Belgium) **VAR: DIVA 3.0 (2018)** 27% would consider buying after hearing the spot (average for 136 radio campaigns) **VAR: DIVA 2.0 (2012–2018)** 22% have a better opinion about the brand	6
Social media	No published evidence, Ebiquity knowledge	2
TV	**DPG Media: MIP (1996–2019)** TV realises spontaneous brandlift of +66% **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** TV ranked in 1st place for 'makes me want to try a new product' **IP Belgium/TNS: The attitude of Belgians to advertising (2012)** TV ranked in 1st place for 'makes me want to try a new product' **RMB: Impact van sponsoring BPMS (2012)** Individuals exposed to media sponsorship campaigns are 43% more likely to recommend brands than those who were unexposed **Space newsletter Feb 2016: Millward Brown cross media study (2015)** TV 2nd place/8 for brand salience and 6th place/8 for consideration (Europe incl. Belgium)	10

Triggers a positive emotional response

Definition:	Scoring criteria:	Evidence:
Emotional connection Ability to trigger a positive emotional response (mood)	0–5, where 5 is strong evidence of the ad triggering a positive emotional response and 0 where there is least emotional response	Secondary research
Seamless experience Non-interruptive seamless part of the media experience	0–5, where 5 is most seamless and least interruptive and 0 is least seamless and most interruptive	Secondary research/ market fact

Continued overleaf

ebiquity

Emotional connection

Medium	Evidence	Score
Cinema	**Bpost Media: Ad'titude tracker (2018)** Cinema has 'better performance' for finding ads 'enjoyable' **Brightfish: Does Size Matter? (2017)** Cinema ads make people feel 30% more emotionally engaged (heart rate variability of 0.04 per millisecond) and has a higher net positivity emotion index (40.7) than online video and TV **Brightfish: The emotional impact of Cinema (2015)** Biometric analysis – cinema viewers 42% more emotionally engaged than home viewers with cinema scoring better on positive emotions – happiness/surprise **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** Cinema 2nd place/9 for 'love the ads' and 2nd place/9 for 'makes me dream' **IP Belgium/TNS: Television, we talk about it and we talk about it again (2010)** Attachment – 53% would miss cinema if it disappeared (4th place/7) **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Cinema 1st place/8 for brand love	5
Direct mail	**Bpost Media: IPSOS (2018)** 17% say addressed mail gives them a 'positive feeling' (1st place/4) **Bpost Media: Ad'titude tracker (2018)** Mail has 'average performance' for finding ads 'enjoyable'	2
Magazines	**Bpost Media: Ad'titude tracker (2018)** Magazines have 'better performance' for finding ads 'enjoyable' **DPG Media: MIP benchmarks (2010–2019)** 20% agree magazine campaigns 'make me laugh' (2nd place/4) **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** Magazines 3rd place/9 for 'love the ads' and 2nd place/9 for 'makes me love a brand' **IP Belgium: Media Brands: Focus on Media Behaviour (2013)** 44% use magazines for entertainment (3rd place/5) **IP Belgium/TNS: Television, we talk about it and we talk about it again (2010)** 42% would miss magazines if they disappeared (6th place/7) **Sanoma: Engagement (2013)** Top 20 ad engagement has ten magazine titles in the North and 15 in the South **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Magazines 7th place/8 for brand love	4
Newspapers	**Bpost Media: Ad'titude tracker (2018)** Newspapers (dailies) have 'average performance' for finding ads 'enjoyable' **DPG Media: MIP benchmarks (2010–2019)** 14% agree newspaper campaigns 'make me laugh' (4th place/4) **EBU: Trust in Media (2017)** Press net trust index in Belgium is positive at 18 (3rd place/5) **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** Newspapers 7th place/9 for 'love the ads' **IP Belgium: Media Brands: Focus on Media Behaviour (2013)** 21% use newspapers for entertainment (5th place/5) **IP Belgium/TNS: Television, we talk about it and we talk about it again (2010)** Attachment – 46% would miss newspapers if they disappeared (5th place/7) **Sanoma: Engagement (2013)** Top 20 ad engagement has three newspaper titles in the North and one in the South **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Newspapers 3rd place/8 for brand love **Statistiek Vlaanderen: Trust in media (2018)** 33% trust newspapers (3rd place/4)	3
Online display	**Bpost Media: Ad'titude tracker (2018)** Online banner ads have 'lower performance' for finding ads 'enjoyable' **Bpost Media: IPSOS (2018)** 4% say banner ads give them a 'positive feeling' (3rd place/4) **EBU: Trust in Media (2017)** Internet net trust index in Belgium is negative -18 (4th place/5) **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** Information website 9th place/9 for 'love the ads' **IP Belgium: Media Brands: Focus on Media Behaviour (2013)** 22% use media sites for entertainment (4th place/5) **IP Belgium/TNS: Television, we talk about it and we talk about it again (2010)** Attachment – 76% would miss the internet (not necessarily the ads) if it disappeared (3rd place/7) **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Online display 8th place/8 for brand love **Statistiek Vlaanderen: Trust in media (2018)** 20% trust the internet (4th place/4)	0
Online video	**Bpost Media: Ad'titude tracker (2018)** Pre-roll and mid-roll video has 'lower performance' for consumers finding ads 'enjoyable' **Brightfish: Does Size Matter? (2017)** Online video has less emotional engagement (heart rate variability of 0.03 per millisecond) and a lower net positivity emotion index than TV and cinema **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** Video website 8th place/9 for 'love the ads' **IP Belgium: Online Compass study (2012)** Pre-roll video scores better than average for all online formats on 'gives me a positive feeling' **RMB: Digitude – Assessing the impact of digital video advertising (2014)** Average enjoyment score of pre-roll ads is 43% **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Online video 6th place/8 for brand love	1

Continued overleaf

Medium	Evidence	Score
Out of home	**Bpost Media: Ad'titude tracker (2018)** OOH has 'better performance' for finding ads 'enjoyable' **Clear Channel Belgium: Cobra (2008–2018)** 51% of respondents seeing an OOH campaign had a positive feeling and 47% found it enjoyable **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** OOH 5th place/9 for 'love the ads' **IP Belgium/TNS: Television, we talk about it and we talk about it again (2010)** Attachment – 12% would miss posters if they disappeared (7th place/7) **Space newsletter Feb 2016: Millward Brown cross media study (2015)** OOH joint 4th place/8 for brand love	3
Radio	**Bpost Media: Ad'titude tracker (2018)** Radio has 'average performance' for finding ads 'enjoyable' **DPG Media: MIP benchmarks (2010–2019)** 16% agree radio campaigns 'make me laugh' (3rd place/4) **EBU: Trust in Media (2017)** Radio net trust index in Belgium is positive at 41 (1st place/5) **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** Radio 4th place/9 for 'love the ads' **IP Belgium: Media Brands: Focus on Media Behaviour (2013)** 67% use radio for entertainment (1st place/5) **IP Belgium/TNS: Television, we talk about it and we talk about it again (2010)** Attachment – 82% would miss radio if it disappeared (2nd place/7) **Sanoma: Engagement (2013)** Top 20 ad engagement has three radio stations in the North and four in the South **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Radio joint 4th place/8 for brand love **Statistiek Vlaanderen: Trust in media (2018)** 48% trust radio (1st place/4)	4
Social media	**Bpost Media: Ad'titude tracker (2018)** Social media has 'lower performance' for finding ads 'enjoyable' **Bpost Media: IPSOS (2018)** 3% say social media ads give them a 'positive feeling' (4th place/4) **EBU: Trust in Media (2017)** Social media net trust index in Belgium is negative at -46 (5th place/5) **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** Social media ads 6th place/9 for 'love the ads' **RMB: Digitude – Assessing the impact of digital video advertising (2014)** Sharing sites perform well on attachment and relaxing scores	1
TV	**Bpost Media: Ad'titude tracker (2018)** TV has 'average performance' for finding ads 'enjoyable' **Bpost Media: IPSOS (2018)** 7% say TV commercials give them a 'positive feeling' (2nd place/4) **Brightfish: Does Size Matter? (2017)** TV has less emotional engagement (heart rate variability of 0.03 per millisecond) and a lower net positivity emotion index than cinema but performs better than online video **DPG Media: MIP benchmarks (2010–2019)** 21% say TV campaigns 'make me laugh' (1st place/4) **EBU: Trust in Media (2017)** TV net trust index in Belgium is positive at 23 (2nd place/5 after radio) **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** TV 1st place/9 for 'love the ads' and 1st place/9 for 'makes me dream' **IP Belgium: Media Brands: Focus on Media Behaviour (2013)** 61% use TV for entertainment (2nd place/5) **IP Belgium/TNS: Television, we talk about it and we talk about it again (2010)** Attachment – 87% would miss TV if it disappeared (1st place/7) **Sanoma: Engagement (2013)** Top 20 ad engagement has four TV stations in the North and none in the South **Space newsletter Feb 2016: Millward Brown cross media study (2015)** TV 2nd place/8 for brand love **Statistiek Vlaanderen: Trust in media (2018)** 46% trust TV (2nd place/4)	4

Seamless experience

Medium	Evidence	Score
Cinema	**Bpost Media: Ad'titude tracker (2018)** Cinema ads rank 5th place/10 for least intrusive, 5th place/10 for least interruptive and 5th place/10 for least irritating **Brightfish: Does Size Matter? (2017)** Cinema ads are less annoying than TV and other small screens **JCDecaux Belgium: Why OOH performs – AdReaction GenXYZ (2017)** Openness to advertising – cinema 3rd place/8 for 'positive perception' **Newsworks: NP Media Barometer (2019)** Cinema ranks 2nd place/9 for least overabundant (too many ads) and 5th place/9 for least intrusive	3
Direct mail	**Bpost Media: Ad'titude tracker (2018)** Direct mail and folders rank 1st place/10 for least intrusive, 1st place/10 for least interruptive and 1st place/10 for least irritating **Bpost Media: IPSOS (2018)** 12% say addressed mail is annoying (1st place for least annoying/4)	5
Magazines	**Bpost Media: Ad'titude tracker (2018)** Magazine ads rank 3rd place/10 for least intrusive, 3rd place/10 for least interruptive and 3rd place/10 for least irritating **JCDecaux Belgium: Why OOH performs – AdReaction GenXYZ (2017)** Openness to advertising – magazines rank 2nd place/8 for 'positive perception' **Newsworks: NP Media Barometer (2019)** Magazine ads rank 4th place/9 for least overabundant (too many ads) and joint 3rd place/9 for least intrusive	4

Continued overleaf

Medium	Evidence	Score
Newspapers	**Bpost Media: Ad'titude tracker (2018)** Newspaper ads rank 2nd place/10 for least intrusive, 2nd place/10 for least interruptive and 2nd place/10 for least irritating **JCDecaux Belgium: Why OOH performs – AdReaction GenXYZ (2017)** Openness to advertising – newspapers rank 4th place/8 for 'positive perception' **Newsworks: NP Media Barometer (2019)** Newspaper ads rank 5th place/9 for least overabundant (too many ads) and joint 3rd place/9 for least intrusive **Newsworks: NP Score (2017–2019)** On average, only 20% of panel members agree that newspaper ads are 'irritating'	**4**
Online display	**Bpost Media: Ad'titude tracker (2018)** Online display ads rank 10th place/10 for least intrusive, 9th place/10 for least interruptive and 8th place/10 for least irritating **Bpost Media: IPSOS (2018)** 31% say banner ads are annoying (4th place for least annoying/4) **JCDecaux Belgium: Why OOH performs – AdReaction GenXYZ (2017)** Openness to advertising – desktop/mobile display ranks 7th place/8 for 'positive perception' **Newsworks: NP Media Barometer (2019)** Ads on newspaper websites rank 5th place/9 for least overabundant (too many ads) and 7th place/9 for least intrusive	**1**
Online video	**Bpost Media: Ad'titude tracker (2018)** Pre-roll and mid-roll ads rank 9th place/10 for least intrusive, joint 8th place/10 for least interruptive and 10th place/10 for least irritating **Brightfish: Does Size Matter? (2017)** Online video ads on small screens are more annoying than video ads on TV and cinema **IP Belgium: Impact of video ads in relation to the broadcast channel (2017)** Viewers are twice as irritated by online commercials as TV ads. Viewers are 'irritated' when ads can be skipped in one instance and not in another **JCDecaux Belgium: Why OOH performs – AdReaction GenXYZ (2017)** Openness to advertising – desktop/mobile video ranks 8th place/8 for 'positive perception' **Newsworks: NP Media Barometer (2019)** Online video ads rank 7th place/9 for least overabundant (too many ads) and 9th place/9 for least intrusive **RMB: Digitude – Assessing the impact of digital video advertising (2014)** 47% say pre-roll ads on YouTube disrupt the visit, 41% that it irritates them and 43% that it is intrusive; while 39% say pre-roll ads on rtbf.be disrupt the visit, 33% that it irritates them and 34% that it is intrusive	**0**
Out of home	**Bpost Media: Ad'titude tracker (2018)** Outdoor ads rank 4th place/10 for least intrusive, 4th place/10 for least interruptive and 4th place/10 for least irritating **Clear Channel Belgium: The Power of MOF (2015)** OOH ads 'are catchy and non-intrusive': 64% of respondents agreed OOH ads are less annoying than television advertisements **JCDecaux Belgium: Why OOH performs – AdReaction GenXYZ (2017)** Openness to advertising – OOH ranks 1st place/8 for 'positive perception' **Newsworks: NP Media Barometer (2019)** OOH 1st place/9 for least overabundant (too many ads) and 1st place/9 for least intrusive	**4**
Radio	**Bpost Media: Ad'titude tracker (2018)** Radio ads rank 6th place/10 for least intrusive, 7th place/10 for least interruptive and 7th place/10 for least irritating **JCDecaux Belgium: Why OOH performs – AdReaction GenXYZ (2017)** Openness to advertising – radio ranks 5th place/8 for positive perception **Newsworks: NP Media Barometer (2019)** Radio commercials rank 6th place/9 for least overabundant (too many ads) and 5th place/9 for least intrusive	**2**
Social media	**Bpost Media: Ad'titude tracker (2018)** Social media ads rank 8th place/10 for least intrusive, 6th place/10 for least interruptive and 6th place/10 for least irritating **Bpost Media: IPSOS (2018)** 20% say social media ads are annoying (2nd place for least annoying/4) **Newsworks: NP Media Barometer (2019)** Ads on social networks rank 8th place/9 for least overabundant (too many ads) and 8th place/9 for least intrusive **RMB: Digitude – Assessing the impact of digital video advertising (2014)** 42% say pre-roll ads on Facebook disrupt the visit, 37% it irritates them and 37% that it is intrusive	**1**
TV	**Bpost Media: Ad'titude tracker (2018)** TV ads rank 7th place/10 for least intrusive, joint 9th place/10 for least interruptive and 9th place/10 for least irritating **Bpost Media: IPSOS (2018)** 23% say TV ads are annoying (3rd place for least annoying/4) **Brightfish: Does Size Matter? (2017)** TV ads are less annoying than video ads on small screens but more annoying than cinema **IP Belgium: Impact of video ads in relation to the broadcast channel (2017)** Viewers are twice as irritated by online commercials as TV ads **JCDecaux Belgium: Why OOH performs – AdReaction GenXYZ (2017)** Openness to advertising – TV ranks 6th place/8 for positive perception **Newsworks: NP Media Barometer (2019)** TV commercials rank 9th place/9 for least overabundant (too many ads) and 6th place/9 for least intrusive	**2**

Delivers a better campaign ROI

Definition:	Scoring criteria:	Evidence:
Proven to increase overall campaign ROI (return on media investment)	0–10, where 10 is the highest ROI and 0 the lowest	Note that the evidence for Belgium is limited. We based the scoring on Ebiquity's knowledge of Belgium and international markets. We reviewed the published studies listed below but we did not consider them to be recent enough or to cover digital media well enough to be used as the sole base for scoring. • Medialaan/GfK: ROI of media investments (2010): covers 6/10 media • JCD/CCB: WHOOHW 2.0 – why and how out-of-home advertising works (2013): covers only 2/10 media • IP Belgium: Optimise your ROI! Watch & Buy (2011 and 2013): covers only 1/10 media

Medium	Score
Cinema	3
Direct mail	5
Magazines	6
Newspapers	7
Online display	4
Online video	7
Out of home	4
Radio	9
Social media	4
TV	10

Maximises campaign reach

Definition:	Scoring criteria:	Evidence:
Medium reach total potential monthly 1+ reach 18–64-year-olds	90%+ = 5, 80–90% = 4, 70–80% = 3, 60–70% =2, less than 60% = 1	Media planning tools – see notes below
Advertising reach typical campaign 1+ reach 18–64-year-olds	80%+ = 5, 65–80% = 4, 50–65%= 3, 25–50% =2, less 25% = 1	

Medium	Medium reach	Notes	Score
Cinema	19.6%	CIM Sep 2018 4 weeks in total Cinepark	1
Direct mail	93.0%	Addressed Mail, Minus Ad'titude 2018, avoidance level + Robinson list	5
Magazines	72.0%	CIM Sep 2018 all magazines (print and digital copy)	3
Newspapers	63.5%	CIM Sep2018 All dailies (print and digital copy)	2
Online display	85.9%	CIM internet audience, sites and apps, March/April 2019	4
Online video	71.2%	Belgium under the influence 2018, You Tube	3
Out of home	99.6%	CIM OOH % people on the move	5
Radio	93.6%	CIM RAM last 3 waves 2018–2019	5
Social media	82.8%	Belgium under the influence 2018, Facebook	4
TV	94.6%	CIM TAM, Total TV, March/April 2019, adjusted to universe	5

Medium	Advertising reach	Notes	Score
Cinema	25.1%	CIM Sep 2018, 6 weeks total Cinepark	2
Direct mail	12.2%	Estimate based on comparable budget level at €0.4 /mail	1
Magazines	70.5%	CIM Sep 2018 (print and digital copy), optimised reach @ 5OTS	4
Newspapers	52.2%	CIM Sep 2018, NP3 (print and digital copy)	3
Online display	53.4%	CIM internet audience, April/March 2019 @frequency cap 7	3
Online video	25.9%	YouTube R&F planner, reach @ 5OTS	2
Out of home	68.8%	CIM OOH, bus shelters average JCD/CCB, visibility adjusted reach	4
Radio	80.5%	CIM RAM last 3 waves 2018–2019, optimised reach @ 10OTS	5
Social media	63.6%	Facebook and Instagram, R&F planner, reach @ 5OTS	3
TV	74.9%	CIM Audimetrie, March/April 2019, optimised reach @ 5OTS	4

Generates short-term sales response

Definition:	Scoring criteria:	Evidence:
Ability to activate sales in the short term	0–10, where 10 is strong evidence of the medium delivering short-term sales response and 0 where there is no evidence. Average rankings from comparative studies used to help determine relative placement	Secondary research

Medium	Evidence	Score
Cinema	No available evidence	**2**
Direct mail	**Welcome Media: In-Home Advertising Experience (2016)** Actions triggered by in-home advertising – 27% visit the website of the brand **Bpost Media: IPSOS (2018)** 15% say addressed mail encourages them to buy (1st place/4) **Bpost Media: Barometer survey (2018)** 40% of receivers of direct mail intend to act e.g. go to brand website, buy, call, or go to shop	**7**
Magazines	**Custo: Custometer (2010–2018)** 68% of magazine readers plan to make a purchase after reading the magazine **DPG Media: MIP benchmarks (2010–2019)** 68% of those recalling magazine campaign would purchase the brand (1st place/4) **IP Belgium: Life Observer (2018)** 1% of 18–64-year-olds' 'last media contact before shopping' is a magazine (joint 6th place/7) **Mediahuis: Connectometer (2014–2019)** 26% of 'recognisers' of magazine ad campaigns have 'buying intention' **Sanoma: The sales effect of magazine advertising (2013)** Households exposed to magazine ads had greater short-term sales uplift than those exposed to TV ads **VAR: Prior to shopping survey (2013)** 6% of supermarket visits preceded by reading a magazine (5th place/5)	**4**
Newspapers	**DPG Media: MIP benchmarks (2010–2019)** 58% of those recalling newspaper campaign would purchase the brand (2nd place/4) **IP Belgium: Life Observer (2018**) 3% of 18–64-year-olds' 'last media contact before shopping' is a newspaper (4th place/7) **Mediahuis: Connectometer (2014–2019)** 26% of 'recognisers' of newspaper ad campaigns have 'buying intention' **Newsworks: NP Media Barometer (2019)** After reading an ad in a newspaper, 39% use the coupon and 38% visit the brand's website **Newsworks: NPScore (2016–2019)** 29% of panel members agree that newspaper ads are 'activating' **VAR: Prior to shopping survey (2013)** 9% of supermarket visits preceded by reading newspapers (4th place/5)	**7**
Online display	**Bpost Media: IPSOS (2018)** 3% say banner advertising encourages them to buy (4th place/4) **IP Belgium: Life Observer (2018)** 12% of 18–64-year-olds' 'last media contact before shopping' is the internet (3rd place/7) **Newsworks: NP Media Barometer (2019)** After seeing an ad on a dailies website, 26% visit the brand's website and 18% use the coupon **RMB: Watch and surf (2012)** 70% of 12–64-year-olds visited the website of a brand after seeing an ad on the internet **VAR: Prior to shopping survey (2013)** 26% of supermarket visits preceded by surfing the internet (2nd place/5) **We Media Digital (OPPA): The impact on online ads (2014)** 28% of those seeing an online ad from a premium content site will try the product	**4**
Online video	**IP Belgium: Life Observer (2018)** 0.2% of 18–64-year-olds' 'last media contact before shopping' is watching short videos on the internet (7th place/7) **RMB: Digitude – Assessing the impact of digital video advertising (2014)** 39% of 15–54-year-olds take 'total action' (looked for more information, visited the brand's website, Facebook page etc.) after seeing a pre-roll commercial on the internet. Consumers aged 18–54 years are positively influenced by pre-roll ads, average purchase intent of 40%	**4**
Out of home	**Clear Channel Belgium: Notoriètè du grand format (2015)** Trigger actions from seeing OOH ads: looking up further information on the internet (17%), a smartphone (14%), going in-store to see the product (14%), purchasing the product (11%) **Clear Channel Belgium: The Power of MOF (2015)** Actions after seeing a panoramic billboard: 14% went in-store to see the product, 11% bought the product **Clear Channel Belgium: Cobra (2008–2018)** 45% of respondents who have seen an OOH campaign are willing to visit a store **JCDecaux/Clear Channel: WHOOHW 2.0: Why and how out-of-home advertising works (2013)** OOH boosts sales by 33% in short term (1 week after), confirming findings of previous survey WHOOHW 1.0 (36%) **JCDecaux Belgium: Drive to store (2017**) 21% of those remembering a JCDecaux campaign visited the site/application/point of sale	**6**

Continued overleaf

Radio	**DPG Media: MIP benchmarks (2010–2019)** 55% of those recalling radio campaign would purchase the brand (3rd place/4) **IP Belgium: Life Observer (2018)** 53% of 18–64-year-olds' 'last media contact before shopping' is the radio (1st place/7) **IP Belgium: R-Force (2016)** Following a radio campaign, intention to purchase increases by +25% **IP Belgium/TNS: The attitude of Belgians to advertising (2015**) Radio ranked in 2nd place/9 for 'went to a place of sale' **VAR: Prior to shopping survey (2013)** 71% of supermarket visits preceded by listening to the radio (1st place/5)	**10**
Social media	**Bpost media: IPSOS (2018)** 4% say social media ads encourage them to buy (3rd place/4) **IP Belgium: Life Observer (2018)** 1% of 18–64-year-olds' 'last media contact before shopping' is social media (joint 6th place/7)	**4**
TV	**Bpost Media: IPSOS (2018)** 12% say TV commercials encourage them to buy (2nd place/4) **DPG Media: MIP benchmarks (2010–2019)** 54% of those recalling TV campaign would purchase the brand (4th place/4) **IP Belgium: Life Observer (2018)** 14% of 18–64-year-olds' 'last media contact before shopping' is a TV channel (2nd place/7) and 29% of 18–64-year-olds' 'last media contact before online shopping' is TV channel (1st place/7) **IP TV: Watch & Buy (2011)** TV boosts in-store promo efficiency. Brands perform better when they increase their promo and TV effort (+3.1% Sales Value Evolution) **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** TV ranked in 1st place/9 for 'went to a place of sale' **Sanoma: The sales effect of magazine advertising (2013)** Households exposed to TV ads had lower short-term sales uplift than those exposed to magazine ads **VAR: Prior to shopping survey (2013)** 18% of supermarket visits preceded by watching TV (3rd place/5)	**9**

Gets your ads noticed

Definition:	**Scoring criteria:**	**Evidence:**
Level of ad avoidance Extent to which consumers can deliberately ignore or avoid seeing the ads	0–3, where 3 is evidence to show lowest level of ad avoidance and 0 where there is the highest ad avoidance	Secondary research/ market fact
Stature and standout Medium's sheer physical size, scale and viewability	0–2, where 2 is biggest size and scale and 0 is minimal size or standout during ad exposure	Secondary research/ market fact
Memorability Medium's ability to make ad/ brand message, audio, or visual memorable and easy to recall	0–3, where 3 is the best memorability and 0 is the worst	Secondary research
Amplification Medium's ability to get audience talking and sharing your message online and offline	0–2, where 2 is strongest evidence of amplification and 0 where there is little or no amplification	Secondary research/ market fact

Ad avoidance

Medium	Evidence	Score
Cinema	**Bpost Media: Ad'titude tracker (2018)** 8% say they are always busy on their smartphones during commercials in the cinema and 26% say they always use at least one avoidance technique (6th place/10)	**3**
Direct mail	**Bpost Media: Ad'titude tracker (2018)** 19% put a 'no publicity' sign on their mailbox and 4% throw away all direct mail and 21% say they always use at least one avoidance technique (joint 2nd place/10) **Bpost Media: Barometer (2019)** 92% open their letter box every day and 86% keep in-home advertising in a visible place after reading	**2**
Magazines	**Bpost Media: Ad'titude tracker (2018)** 21% say they always use at least one avoidance technique (joint 2nd place/10)	**2**
Newspapers	**Bpost Media: Ad'titude tracker (2018)** 25% say they always use at least one avoidance technique (5th place/10)	**2**
Online display	**Bpost Media: Ad'titude tracker (2018)** 32% use an adblocker, rising to 58% of 18–24 year olds and 67% say they always use at least one avoidance technique (10th place/10) **Space: Advertising blockers (2015)** 27% of Belgians claim to use an adblocker (23% of Dutch speakers and 32% of French speakers) **Space: The contract with online advertising (2016)** Acceptance: around 60% say splash pages irritate or make them avoid the site (3rd place/5 digital formats) followed by banner ads at approx. 50% (4th place/5 digital formats)	**1**

Continued overleaf

Medium	Evidence	Score
Online video	**Bpost Media: Ad'titude tracker (2018)** 32% use an adblocker, rising to 58% of 18–24 year olds and 63% skip all pre-roll video commercials when technically possible, and 65% say they always use at least one avoidance technique (9th place/10) **Space: The contract with online advertising (2016)** Acceptance: around 68% say non-skippable videos irritate or make them avoid the site (1st place/5) followed by skippable videos at approx. 63% (2nd place/5 digital formats)	0
OOH	**Bpost Media: Ad'titude tracker (2018)** 18% say they always use at least one avoidance technique (1st place/10)	3
Radio	**Bpost Media: Ad'titude tracker (2018)** 6% zap radio stations during the commercials (doubles in 25–34 year olds) and 21% say they always use at least one avoidance technique (joint 2nd place/10)	2
Social media	**Bpost Media: Ad'titude tracker (2018)** 27% say they always use at least one avoidance technique (7th place/10) **Space: The contract with online advertising (2016)** Acceptance: around 49% say Facebook ads irritate or make them avoid the site (5th place/5 digital formats)	1
TV	**Bpost Media: Ad'titude tracker (2018)** 23% zip (fast forward) through TV advertisements and 40% say they always use at least one avoidance technique (8th place/10) **Space: Attention at the heart of TV audiences (2016)** Distraction levels range between 10% (peaktime) to more than 50% (daytime), 'attentively watch or listen' between 90% and less than 50%.	1

Stature and standout

Medium	Evidence	Score
Cinema	**Brightfish: From Viewable to Viewed (2018)** Cinema screen is 100% viewable and eye fixation shows that 85% viewable time was seen (1st place/4) **Brightfish: Does Size Matter? (2017)** Cinema ads have highest % time with eyes on screen (85%), highest fixation time on brand slogans (271 milliseconds) and lowest number of distractions (8) compared to TV and other screens	2
Direct mail	No available evidence – Ebiquity assumption	1
Magazines	**Brightfish: From Viewable to Viewed (2018)** Press is 100% viewable but eye fixation shows that 7.5% of viewable time was seen	1
Newspapers	**Brightfish: From Viewable to Viewed (2018)** Press is 100% viewable but eye fixation shows that 7.5% of viewable time was seen	1
Online display	**Brightfish: From Viewable to Viewed (2018)** Digital direct is 68% viewable and digital programmatic is 60% viewable while eye fixation for desktop digital display shows that 1.4% of viewable time was seen **Moat Display Benchmarks Belgium (Q1 2019)** Viewability of display on desktop is 58% and on mobile is 51% (MRC definition) **UMA: View on Viewability (2018)** Overall viewability measured for UMA campaigns via DoubleClick Campaign Manager (DCM) for all online display is 58% **We Media Digital (OPPA): Viewability (2017)** 64% of all measurable desktop impressions in the titles of the Belgian publishers are visible, versus 56% Belgian market average	0
Online video	**Brightfish: Does Size Matter? (2017)** Percentage time with eyes on screen was 77% for PC and 74% for smartphone, time fixated on brand slogans was 181 milliseconds for PC and 201 milliseconds for smartphones and number of distractions was 32 for PC and 25 for smartphones. PC and smartphones perform less well than TV and cinema screens on all measures **Moat Video Benchmarks Belgium (Q1 2019)** Viewability of video on desktop is 33% and on mobile is 21% (audible and visible at 2nd quartile) **UMA: View on Viewability (2018)** On average, according to measurements via DCM, 76% of videos broadcast by UMA agencies have been fully viewed (better than market average)	0
Out of home	No available evidence – size, stature and viewability is good	2
Radio	No available evidence – 'you can close your eyes but not your ears'	1
Social media	No available evidence – Facebook display tends to be in line with online display (MRC definition) but has much lower viewability for video (Ebiquity knowledge)	0
TV	**Brightfish: From Viewable to Viewed (2018)** TV screen is 100% viewable but eye fixation shows that 23% of viewable time was seen **Brightfish: Does Size Matter? (2017)** Viewers of commercials on TV had 79% of the time with their eyes on screen, 251 milliseconds fixated on brand slogans and 23 distractions – performing better than smaller screens but not as well as cinema	1

Memorability

Medium	Evidence	Score
Cinema	**JCDecaux/Nielsen MDB: Why OOH performs (2018)** Cinema has the least cluttered environment (no. advertisers in a two-week period) (1st place/6) **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Cinema 1st place/8 for aggregate result of communication recall x brand awareness)	**3**
Direct mail	**Bpost Media: IPSOS (2018)** 19% say direct mail ads 'gather attention' (joint 1st place/4) **Bpost Media: Barometer (2019)** 76% recall direct mail	**2**
Magazines	**DPG Media: MIP benchmarks (1996–2011)** Average ad recognition for magazines is 30% (3rd place/6) and attribution is 48% (5th place/6) **Mediahuis: Connectometer (2014–2019)** Magazine campaigns have an average 50% recognition score and 60% attribution score **JCD/Nielsen MDB: Why OOH performs (2018)** Magazines 5th place/6 for least cluttered environment (no. advertisers in a two-week period) **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Magazines 3rd place/8 for aggregate result of communication recall x brand awareness **Space: Pulsar 2a: Magazines as solid connection point, for consumers (2015)** Magazine ads have a higher average attention score (of 4.61) than TV ads (4.49)	**2**
Newspapers	**DPG Media: MIP benchmarks (1996–2011)** Average ad recognition for newspaper is 26% (5th place/6) and attribution is 48% (4th place/6) **DPG Media: CHAD benchmarks (2013–2015)** Average ad recognition for newspaper is 48% and attribution is 62% **JCDecaux/Nielsen MDB: Why OOH performs (2018)** Dailies 6th place/6 for least cluttered environment (no. advertisers in a 2-week period) **Mediahuis: Connectometer (2014–2019)** Newspaper campaigns have an average 45% recognition score and 68% attribution score **Newsworks: NP Score (2017–2019)** On average, newspaper ads achieve a 58% recognition score and 57% attribution score **ROSSEL: EYE Barometer (2002–2019)** Newspaper campaigns have an average 47% recognition score and 51% attribution score **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Newspapers joint 4th place/8 for aggregate result of communication recall x brand awareness	**2**
Online display	**Bpost Media: IPSOS (2018)** Only 10% say online banner ads 'gather attention' (3rd place/4) **DPG Media: MIP benchmarks (1996–2011)** Average attribution for banners is 52% (joint 2nd place/6) and useful score is 9% with resulting recognition at 17% (6th place/6) **IP Belgium: Online Compass study (2012)** Spontaneous and aided recall for online display formats is less than half that achieved by pre-roll video **Mediahuis: Connectometer (2014–2019)** Online display campaigns have an average 33% recognition score and 49% attribution score **OPPA: The impact on online ads (2014)** Display ads on premium content sites score 34% recognition and 21% spontaneous attribution **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Online display 6th place/8 for aggregate result of communication recall x brand awareness	**0**
Online video	**IP Belgium: Impact of video ads in relation to the broadcast channel (2017)** Memorisation/recall on a news site (32%) and YouTube (23% when ad not skipped) is not as strong as television (42%) **IP Belgium: Online Compass study (2012)** Spontaneous recall (16%) and aided recall (34%) scores for pre-roll video more than twice the average of other online formats **RMB: Digitude – Assessing the impact of digital video advertising (2014)** Average spontaneous recall of pre-roll ads is 52% **SBS: Athena (2019)** Online video performs better than TV on ad recognition but less well on brand attribution **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Online video 7th place/8 for aggregate result of communication recall x brand awareness	**1**

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Medium	Evidence	Score
Out of home	**Clear Channel Belgium: Cobra (2008–2018)** Outdoor campaigns on average have 29% recognition score, 58% attribution score **DPG Media: MIP benchmarks (1996–2011)** Average ad recognition for posters (affichage) is 29% (4th place/6) and attribution is 52% (joint 2nd place/6) **JCDecaux, CIM, STIB, BRAT: The metro audience (2018)** 27% of Brussels metro users remembered and correctly attributed an OOH campaign (utility score), 44% recognition, 60% attribution **JCDecaux/AQRate: BOA (2008–2018)** Outdoor campaigns on average have 31% recognition score, 60% attribution score and 19% utility score (% who recognise the poster and attribute the brand correctly) **JCDecaux/Nielsen MDB: Why OOH performs (2018)** OOH 2nd place/6 for cluttered environment (no. advertisers in a two-week period) **JCDecaux: Drive to store (2017)** 40% remember having seen the poster **Space newsletter Feb 2016: Millward Brown cross media study (2015)** OOH 8th place/8 for aggregate result of communication recall x brand awareness	1
Radio	**DPG Media: MIP benchmarks (1996–2011)** Average ad recognition for radio is 37% (2nd place/6) and attribution is 45% (6th place/6) **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** Radio 2nd place/9 for 'I easily remember the ads' **IP Belgium: R-Force (2016)** Following a radio campaign, spontaneous brand awareness increases by +27% on average **JCDecaux/Nielsen MDB: Why OOH performs (2018)** Radio 4th place/6 for least cluttered environment (no. advertisers in a two-week period) **Space newsletter Feb 2016: Millward Brown cross media study (2015)** Radio joint 4th place/8 for aggregate result of communication recall x brand awareness **Spotify: The new audio (2016)** 63% recalled an ad from listening to the radio, compared to 77% for Spotify **VAR: DIVA (2011–2015)** Average recognition for radio is 49% and average attribution 51% **VAR: DIVA 3.0 (2018)** 46% recognition and 31% attribution (average for 136 radio campaigns)	1
Social media	**Bpost Media: IPSOS (2018)** 9% say social media ads 'gather attention' (4th place/4)	1
TV	**Bpost Media: IPSOS (2018)** 19% say TV ads 'gather attention' (joint 1st place/4) **DPG Media: MIP benchmarks (1996–2011)** Average ad recognition for TV is 62% (1st place/6) and attribution is 56% (1st place/6) **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** TV 1st place/9 for 'I easily remember the ads' **IP Belgium: Impact of video ads in relation to the broadcast channel (2017)** Memorisation/recall of the brand is much stronger in television (42%) than on a news site (32%) or YouTube (23% when ad not skipped) **JCDecaux/Nielsen MDB: Why OOH performs (2018)** TV 3rd place/6 for least cluttered environment (no. advertisers in a two-week period) **SBS: Athena (2019)** TV performs better than online video on brand attribution but less well on ad recognition **Space newsletter Feb 2016: Millward Brown cross media study (2015)** TV 2nd place/8 for aggregate result of communication recall x brand awareness **Space: Pulsar 2a: Magazines as solid connection point, for consumers (2015)** TV has a lower attention score (4.49) than magazine ads (4.61)	3

Amplification

Medium	Evidence	Score
Cinema	**IP Belgium/TNS: TV We talk about it (2010)** Cinema is 7th place/7 for 'often talking about the ads' in 2+ person households and 5th place/7 in single person households	0
Direct mail	**Bpost: Evidence by Bpost on Addressed Direct Mail (2019)** 27% of direct mail readers will speak about an offer/ direct mail with someone else	1

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Medium	Evidence	Score
Magazines	**IP Belgium/TNS: TV We talk about it (2010)** Magazines are 4th place/7 for 'often talking about the ads' in 2+ person households and 3rd place/7 in single person households **Mediahuis: Connectometer (2014–2019)** Magazine ad campaigns have an average WOM index of 39 **We Media Digital (OPPA): Brand buzz survey (2012)** Magazine or newspaper ads joint 1st place/8 for driving conversation	1
Newspapers	**IP Belgium/TNS: TV We talk about it (2010)** Dailies are 5th place/7 for 'often talking about the ads' in 2+ person households and 2nd place/7 in single person households **Mediahuis: Connectometer (2014–2019)** Newspaper ad campaigns have an average WOM index of 40 **Mediahuis Connect: Word-of-Mouth Study (2011)** 30% talked about advertising in a newspaper (3rd place/4) **Newsworks: NP Media Barometer (2019)** After seeing newspaper ads, 22% say they have conversations with relatives and 17% say they have conversations via internet or social networks **We Media Digital (OPPA): Brand buzz survey (2012)** Magazine or newspaper ads joint 1st place/8 for driving conversation	1
Online display	**IP Belgium/TNS: TV We talk about it (2010)** Internet is 3rd place/7 for 'often talking about the ads' in 2+ person households and 4th place/7 in single person households **Mediahuis: Connectometer (2014–2019)** Online display ad campaigns have an average WOM index of 39 **Mediahuis Connect: Word-of-Mouth Study (2011)** 33% talked about advertising on a website (2nd place/4) **Newsworks: NP Media Barometer (2019)** After seeing ads on newspaper dailies websites, 21% say they have conversations with relatives and 16% say they have conversations via internet or social networks **We Media Digital (OPPA): The impact of online ads (2014)** 17% of those seeing an online ad from a premium content site will speak about the brand **We Media Digital (OPPA): Brand buzz survey (2012)** Content sites ads 4th place/8 and web portal ads joint 6th place/8 for driving conversation	1
Online video	**We Media Digital (OPPA): Brand buzz survey (2012)** Online video ads 8th place/8 for driving conversation **SBS: Athena (2019)** Online video campaigns perform better on 'high talk value' than TV campaigns	1
Out of home	**Clear Channel Belgium: Cobra (2008–2018)** On average 31% say that an OOH campaign generates 'word of mouth' **IP Belgium/TNS: TV We talk about it (2010)** OOH is 6th place/7 for 'often talking about the ads' in 2+ person households and 6th place/7 in single person households **We Media Digital (OPPA): Brand buzz survey (2012)** OOH ads 4th place/8 for driving conversation	1
Radio	**IP Belgium/TNS: TV We talk about it (2010)** Radio 2nd place/8 for 'often talking about the ads' in 2+ person households and 7th place/8 in single person households **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** Radio ranked in 2nd place/9 for 'often talk about the ads' **IP Belgium: R-Force (2016)** Following a radio campaign, level of recommendation increases by +27% **Mediahuis Connect: Word-of-Mouth Study (2011)** 13% talked about advertising on radio (4th place/4) **We Media Digital (OPPA): Brand buzz survey (2012)** Radio ads 5th place/8 for driving conversation	1
Social media	**We Media Digital (OPPA): Brand buzz survey (2012)** Social media ads joint 6th place/8 Evidence is lacking but social media is designed for sharing and amplifying content	2
TV	**IP Belgium/TNS: TV We talk about it (2010)** TV 1st place/7 for 'often talking about the ads' in 2+ person households and 1st place/7 in single person households **IP Belgium/TNS: The attitude of Belgians to advertising (2015)** TV ranked in 1st place/9 for 'often talk about the ads' **Mediahuis Connect: Word-of-Mouth Study (2011)** 47% talked about advertising on TV (1st place/4) **RMB: Watch and surf (2012)** 35% have talked on the internet about a TV programme they have seen previously, 26% while watching the programme **SBS: Athena (2019)** TV campaigns perform less well on 'high talk value' than online video campaigns **SBS: Let's talk (2017)** 31% of Flemish respondents have talked about a TV programme they have watched or intend to talk about it **We Media Digital (OPPA): Brand buzz survey (2012)** TV ads 3rd place/8 for driving conversation	2

Is brand safe and transparent

Definition:	Scoring criteria:	Evidence:
Safe environment Ad appears in an environment that is third party regulated, ad is guaranteed not to appear in an inappropriate context	0–5, where 5 is safest environment and 0 is least safe environment	Secondary research/ market fact
Transparent Audience measurement tool (survey) is fully transparent and is verified by third parties. Transparent post-campaign delivery reports are provided. No opportunity for fraud	0–5, where 5 is the audience measurement is fully transparent and third party verified and 0 is no transparency or third-party verification	Secondary research/ market fact

Safe environment

Medium	Evidence	Score
Cinema	**Editorial:** Commission Inter-Communautaire de Contrôle des Films (CICF) regulates all films shown in Belgian cinemas **Advertising content:** self-regulated, JEP (Jury d'Ethique Publicitaire Jury voor Ethische Praktijken inzake reclame) handles complaints and provides advice	5
Direct mail	Belgian Association of Marketing (BAM) enforces Federation of European Marketing (FEDMA) code. Federal: APD (Autorité de protection des données)/GBA (Gegevensbeschermingsautoriteit) **Advertising content:** self-regulated, no support for JEP	4
Magazines	**Editorial:** Raad voor de Journalistiek/Conseil de déontologie journalistique: Code of Journalistic Principles. The publisher takes editorial responsibility **Advertising content:** self-regulated, JEP (see above) handles complaints and provides advice	4
Newspapers	**Editorial:** Raad voor de Journalistiek/Conseil de déontologie journalistique: Code of Journalistic Principles. The publisher takes editorial responsibility **Advertising content:** self-regulated, JEP (see above) handles complaints and provides advice	4
Online display	**Editorial:** Belgian ISPA Code of Practice – applies to members only Federal: APD (Autorité de protection des données)/GBA (Gegevensbeschermingsautoriteit) **Advertising content:** Self-regulated, IAB Digital Advertising Policy Guide (BAM represents Belgium in the IAB global network). JEP (see above) handles complaints and provides advice **CMO Council, Brand protection from digital content infection (2017)** A quarter of the world's marketers have reported specific examples of where their digital advertising appeared alongside offensive and compromising content (based on a survey of members in 110 countries); 72% of brand advertisers engaged in programmatic buying are concerned about brand integrity	2
Online video	**Editorial:** Broadcaster VOD is covered by TV legislation YouTube and video sharing sites – self regulated/automated but under criticism **Advertising content:** Self-regulated, IAB Digital Advertising Policy Guide (BAM represents Belgium in the IAB global network). YouTube and video sharing sites do not support JEP **CMO Council: Brand protection from digital content infection (2017)** See online display	1
Out of home	**Advertising content:** Self-regulated, JEP (see above) handles complaints and provides advice OOH remains vulnerable to inappropriate tagging	3
Radio	**Editorial:** 'Vlaamse Regulator voor de Media' (VRM) for the Flemish Community – 'Conseil Supérieur de l'Audiovisuel' (CSA) for the French Community. The broadcaster takes editorial responsibility **Advertising content:** self-regulated, JEP (see above) handles complaints and provides advice	4
Social media	**Editorial:** Self-moderated, providers are under increasing criticism for failing to moderate content **Advertising content:** Social platforms do not support the JEP	0
TV	**Editorial:** 'Vlaamse Regulator voor de Media' (VRM) for the Flemish Community – 'Conseil Supérieur de l'Audiovisuel' (CSA) for the French Community. The broadcaster takes editorial responsibility **Advertising content:** self-regulated, JEP (see above) handles complaints and provides advice	4

Transparent

Medium	Evidence	Score
Cinema	Measurement tool overseen by CIM (the Joint Industry Committee of media, media agencies and advertisers). The CIM Cinema study provides audience data, methodology is fully transparent online. Post-buy report available based on ticket sales, but not 3rd party controlled.	4
Direct mail	BPost constantly monitors delivery of postal services by 3rd party.	2
Magazines	Measurement tool overseen by CIM (the Joint Industry Committee of media, media agencies and advertisers). The CIM authenticates print run and distribution of most of the titles and a press coverage study provides information about the number of readers of these copies and their profile. Methodology is fully transparent online. There is no detailed post-buy report available.	4
Newspapers	As magazines above.	4
Online display	Measurement tool overseen by CIM. CIM Internet study consists of traffic measurement and an audience study based on a panel. Methodology is fully transparent online. Only Belgian CIM subscribers are measured. **We Media Digital** Belgium's premium websites keep their brand safety high and use tools recognised by the Media Rating Council such as Moat or DFP to measure invalid traffic. 97.2% of traffic on these sites is human (2016) and 93% of OPPA website impressions are measurable (2016). **UBA: The State of Ad Fraud in the Belgian Market (2017)** On average just 1.9% of non-mobile ad impressions (mostly programmatic and direct display) come from fraud. Ad impressions served outside the EU result in higher fraud rates as well as those from certain publishers. Post-campaign delivery reports available via media owner stats, agency ad server stats, as well as via ad verification third parties (e.g Moat). No single source industry standard yet.	2
Online video	See CIM internet study above. YouTube provides audience analytic tool, not 3rd party controlled. **UBA: The State of Ad Fraud in the Belgian Market (2017)** While the study did not focus on online video it noted the pervasiveness of bot fraud in video advertising. Post-campaign delivery reports available via media owner stats, agency ad server stats, as well as via ad verification third parties (e.g Moat). No single source industry standard yet.	2
Out of home	Measurement tool overseen by CIM. The CIM Out of Home study combines the movement data of all Belgians with information about the placement of billboards. From 2017, the study has used a new currency based on effective contacts. There are no independent controls or post-buys available.	4
Radio	Measurement tool overseen by CIM. CIM Radio Study is published 6x/year based on listening diaries. No detailed post-buy reports are available but a good proxy is possible.	4
Social media	No single source of data or joint industry committee overseeing social media measurement. Facebook/Instagram, Twitter all provide audience analytic tools. No transparent and independent traffic validation available. Post-campaign delivery reports available via social media platforms or third parties (ad verification).	2
TV	Measurement tool overseen by CIM. The CIM TV tool uses viewing meters installed in 1,500 homes (representing approximately 3,700 people and registered guests). Measures viewing at the time of broadcast and up to and including 7 days later. CIM TV study provides exact post-campaign delivery reports on ad level.	5

Low cost audience delivery

Definition:	Scoring criteria:	Evidence:
Low cost audience delivery – media gross cost per thousand for reference format	10 = lowest cost – 1 = highest cost	UMA Evolution of advertising cost and Ebiquity proprietary data

Medium	Evidence	Score
Cinema	UMA 2013–2018 evolution of advertising cost: in 2018 gross cpm 30" was €58.8	2
Direct mail	Based on BPost addressed mail rate card cost of €400 cpm households (no cost for data included)	1
Magazines	UMA 2013–2018 evolution of advertising cost: in 2018 gross cpm for 1/1 page was €21.3	6
Newspapers	UMA 2013–2018 evolution of advertising cost: in 2018 gross cpm for 1/1 page was €30	4
Online display	UMA 2011–2016 evolution of advertising cost: in 2016 gross cpm was €12.5. This does not include programmatic that has a significantly lower cost	7
Online video	Based on Ebiquity's proprietary data, we place online video as the third most expensive medium after direct mail and cinema	3
Out of home	UMA 2013–2018 evolution of advertising cost: in 2018 gross cpm for 'average format' was €6.2 (this is based on the new 'visibility adjusted' contact definition)	9
Radio	UMA 2013–2018 evolution of advertising cost: in 2018 gross cpm for 30" was €7.2	8
Social media	Based on Ebiquity's proprietary data, we estimate social media to have the lowest cpm	10
TV	UMA 2013–2018 evolution of advertising cost: in 2018 gross cpm for 30" was €22.3	5

Appendix 3: secondary research sources

Aegis Media
AQRate
Bpost media
Brightfish
Clear Channel Belgium (CCB)
CIM
CMO Council
Custo
Data2Decisions
DPG Media
EBU
IP Belgium
JCDecaux
Mediahuis Connect
Medialaan (DPG Media)
Médiametrie
Moat
Newsworks
RMB (Regie Media Belge)
Rossel Advertising
Sanoma
SBS
Space
Spotify
Statistiek Vlaanderen
STIB - MVIB
UBA (Unie van Belgische Adverteerders)
UMA (United Media Agencies)
VAR
Welcome Media
We Media Digital (OPPA)

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With more than 25 years' marketing and media experience in client, agency and consultancy roles, Nathalie has a solid understanding of the challenges facing advertisers in relation to media transformation.

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