

COVID-19 LIVING IN THE NEW NORMAL

WEEK 8

06/05/20

Brussels

HAVAS TALKS



« Ce matin, j'ai croisé un masque avec personne derrière. Une peur pas habitée. Une peur désincarnée. Une peur qui se faufilait comme une ombre, dans les rues. Comme un vent qui s'engouffre, qui ne nous lâche pas, qui nous tient ... Au corps, au cœur, à l'âme... Et puis, savoir au fond de nous, que ça s'ouvre, que ça s'entrouvre, qu'on va y retourner. Qu'on va se recroiser...

Il faut respecter. Bien sûr. Le corps, la santé... Mais il faut vivre! » .

L'auteur de ce magnifique [texte](#), Edouard Baer, a su trouver les mots. Alors, oui... parce qu'il faut vivre, que je vais bientôt y retourner, que je vais bientôt vous recroiser... j'ai commandé mes masques, accessoires indispensables de l'été 2020.

Ils seront plutôt colorés et avec des motifs divers et variés. Des créations originales de petits stylistes belges, car je favorise le local. Depuis longtemps la norme en Asie, et même sur les podiums des défilés, le masque fait une entrée remarquée dans nos garde-robes. On en parle cette semaine, première semaine de « déconfinement ».

Déconfinement oblige, une page se tourne. Il est temps de nous dire au revoir. Cette « newsletter » aura été un beau challenge. On a énormément appris: sur nous, sur vous, de vous. Maintenant, il est temps pour moi et mon équipe rédactionnelle de se tourner vers l'avenir et de préparer l'été ainsi que la rentrée. Car il faut vivre!

Vanessa Sanctorum, Strategy Director – Havas Media Belgium



Les commerces rouvriront donc lundi prochain et les Belges pourront, dès ce dimanche, inviter jusqu'à quatre personnes à la maison. "Le retour à une certaine normalité est à portée de main", a conclu ce mercredi Sophie Wilmès lors de la conférence de presse du Conseil national de sécurité. Normalité ?

Hésitant entre le souhait de retrouver la vie comme avant, l'angoisse économico-sanitaire et l'espoir du développement d'un monde meilleur, les consommateurs pourraient nous surprendre dans les semaines et mois qui viennent. Investir dans la compréhension de ce qu'ils pensent, ressentent et réalisent sera plus que jamais un facteur de succès pour les business en rémission.

Sans panels, études et recherches, nos décisions sont prises sur base d'informations très incomplètes. Sans solutions AdTech et MarTech solides, et la collecte consentie d'informations sur les parcours et préférences des consommateurs, notre capacité à leur offrir une expérience rencontrant leurs attentes restera limitée. L'objectif consiste à bridger le monde de l'Insight et celui de l'ID-Data pour gagner la bataille de la connaissance du consommateur.

S'il faut retenir quelque chose de l'épreuve que nous traversons, je retiendrai cette capacité à recâbler différemment nos ressources pour dépasser les obstacles qui ont été jetés devant nous. Elle est une force pour l'avenir.

Mathias Beke, Chief Intelligence Officer – Havas Media Belgium

EXPERTS OPINIONS



Empathy

“ Today, fear and insecurity reign in the population, and people are constantly looking for information. Advertisers therefore have every interest in opting for informative communication with great empathy. Otherwise, their message may miss its purpose. ”

Tatjana Raman, Head of Media & Market Intelligence (bpost) – MM



People-centric

“ It is up to all of us and, of course, to all marketing players to reintegrate people into their strategies, to put them back at the center of the game, to listen to their expectations, their hopes. It is up to companies to reintegrate marketing into their decision-making structures so that they no longer develop solely on profit but thanks to their contribution to society. ”

Patrick Steinfert, Director (BAM – Belgian Association of Marketing) – PUB

CONTENT

CONTEXT

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FROM LOCKDOWN TO EXIT

an overview of the major events & announcements

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BELGIAN CONSUMER SENTIMENT:

about the changing buying habits of Belgians during lockdown and their aspirations for the day after

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a look on the surfing behavior and differences between men and women, between young and old in April 2020

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LAST WEEK OF LOCKDOWN AUDIENCES

and a report on the content offer VS the content consumption on the main FR TV channels by RMB

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MASKS UP! HANDS DOWN?

getting a mask, knowing how to wear and where to wear it... The next big challenge

#BRANDOPTIMISM

6

OPTIMISM FOR OURSELVES & OUR BRANDS

in the spotlight: Havas Brussels, ORANGE, bpost, Veritas, STIB/MIVB

A low-angle shot of a person's legs and feet walking on a wooden boardwalk. The person is wearing blue jeans and brown sneakers with white laces. The boardwalk is made of wooden planks and has a white crosswalk line. The background is blurred, showing a building and a fence. The entire image is overlaid with a teal color. The text "FROM LOCKDOWN TO EXIT..." is written in white, bold, sans-serif capital letters across the lower half of the image.

FROM LOCKDOWN TO EXIT...



COVID-19 TIMELINE IN BELGIUM

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



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



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



Phase 2

Monday, March 9th

Regional measures

Wednesday, March 11th

Belgium hands powers to caretaker government

Coronavirus pandemic sparks new debate on the ongoing federal government formation

Monday, March 16th

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

Friday, March 27th

Friday, March 6th

10 federal actions to help businesses

Coronavirus : la Belgique entre en "phase 2 renforcée"



Tuesday, March 10th

Prohibited groupings

Thursday, March 12th

Phase 2 re-inforced in BE

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

Tuesday, March 17th

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

Wednesday, April 15th

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

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



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

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



Pas de renforcement mais une prolongation du confinement en Belgique





ENDING THE LOCKDOWN IN FOUR PHASES

PHASE 1A



- Industries and B2B services will open first



- Fabric businesses open to produce masks



- Masks become mandatory in public transports

PHASE 1B

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



PHASE 3



- HORECA could open if the previous phases are successful



- Collective sports are allowed under certain conditions

PHASE 2



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



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



- One day trips are allowed



Wednesday, April 15th

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

Friday, April 24th

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

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



Monday, May 4th

Wednesday, May 6th

Belgian government announced that Phase 1A is a success. It will also be possible (10th of May) for families to invite the 4 (same) people home. Shopping is allowed but alone.

Commerces, contacts sociaux: le Conseil national de sécurité confirme la poursuite du déconfinement



Monday, May 11th

Monday, May 18th

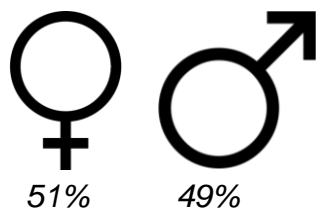
Monday, June 8th

A photograph of a multi-level shopping mall interior. The mall features green-painted structural pillars and railings. Various retail stores are visible on different levels, including 'Etam' and 'H&M'. People are seen walking on the ground floor and on the upper levels. The lighting is bright and even.

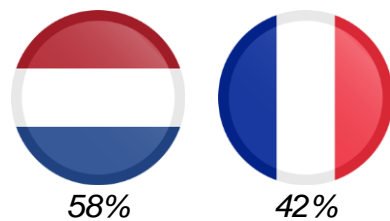
BELGIAN CONSUMER SENTIMENT

purchase behavior & buying attitudes during Covid-19

Gender



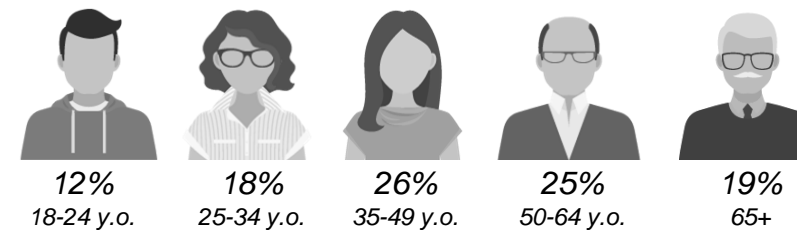
Language



Prof. active



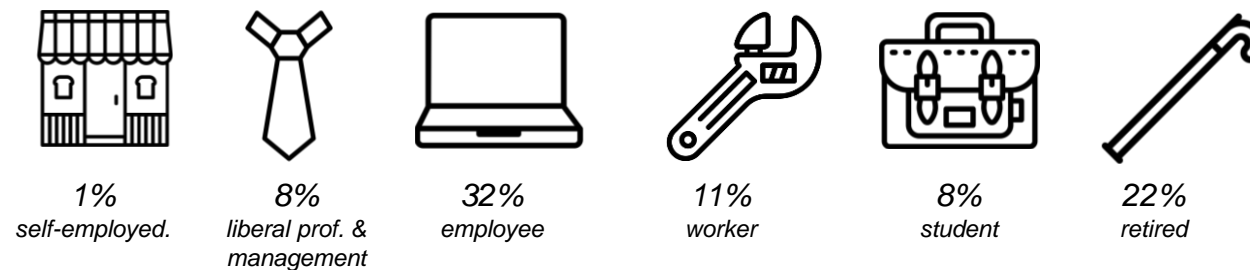
Age



Region

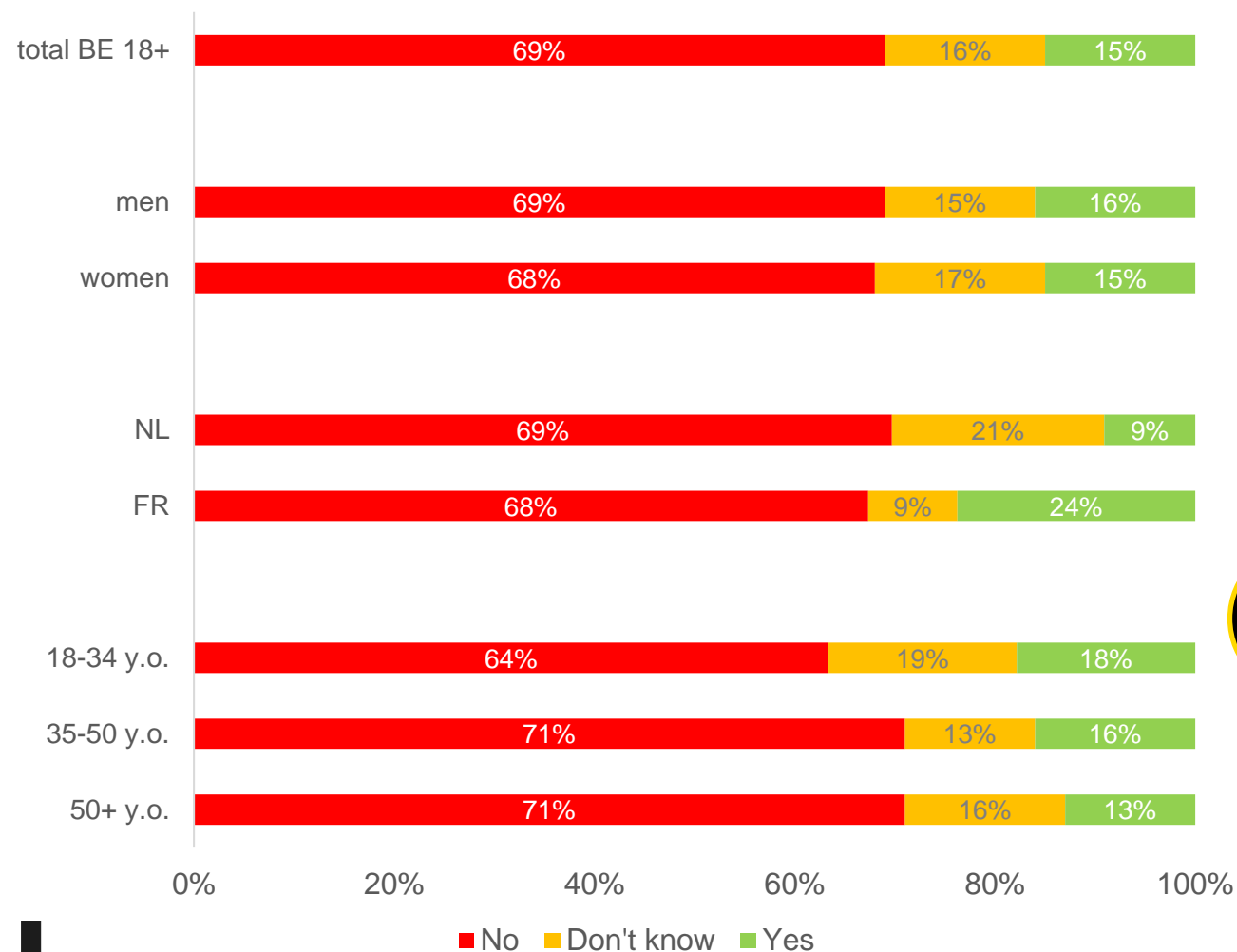


Professional situation



7 OUT OF 10 SATISFIED BY COMMUNICATION FROM USUAL RETAILERS

Have you been **disappointed by a lack of communication** from your usual retailers?



NO



71% aff 103



+ 50 y.o.

DON'T KNOW



21% aff 134

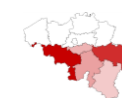


Dutch-speaking

YES



24% aff 154



French-speaking

71% aff 103



35-49 y.o.

19% aff 116



18-34 y.o.

18% aff 116



18-34 y.o.

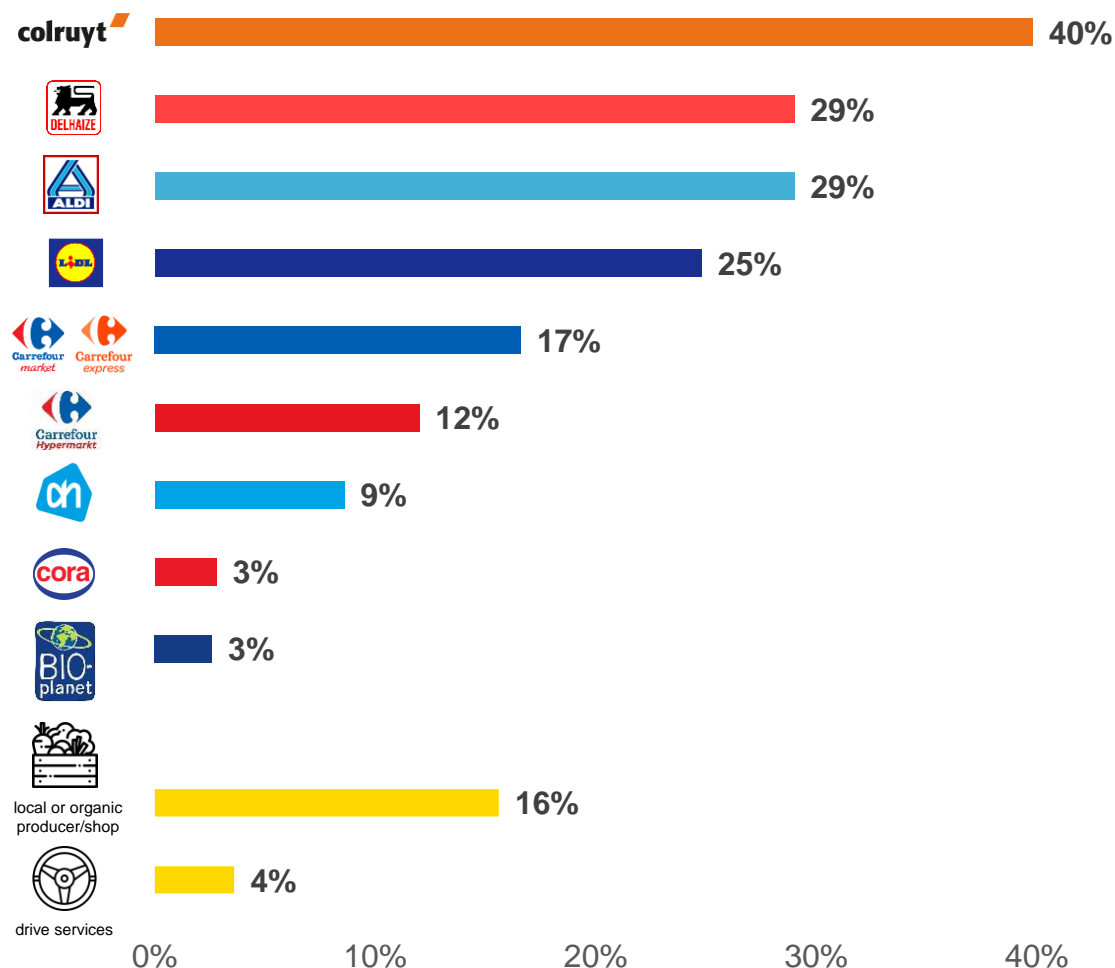
BOOMERS & SENIORS MOST SATISFIED

Nearly 7 out of 10 people aged 50+ y.o. were happy with the communication of their usual retailers. 16% were undecided and only 13% were disappointed by their usual retailers.

Special shopping times, information about social distancing in the stores and other Covid19-related information were clearly appreciated by older age groups. At the contrary, nearly 1 out of 15 young adult in Belgium was not happy with retailers' communication efforts



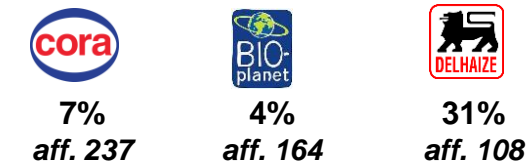
COLRUYT, DELHAIZE AND ALDI WERE THE MOST USEFUL FOOD SUPPLIERS



TOP 3 NL (ranked on selectivity)



TOP 3 FR (ranked on selectivity)



TOP 3 ♀ (ranked on selectivity)



TOP 3 ♂ (ranked on selectivity)



LOCAL & ORGANIC MUST PROVE UTILITY

Everyone agrees: local & organic producers have to reinforce their (brand) presence in the minds of consumers to appeal to more visitors and prove their utility (and distinction with supermarket retailers)

TOTAL BE

18-34 y.o.



3%

5%



16%

16%



4%

5%

Which supermarket chain or food supplier did you find the most useful during the crisis?

COLRUYT, LIDL & CARREFOUR BEST IN MEETING EXPECTATIONS

BEST IN CLASS

1

colruyt

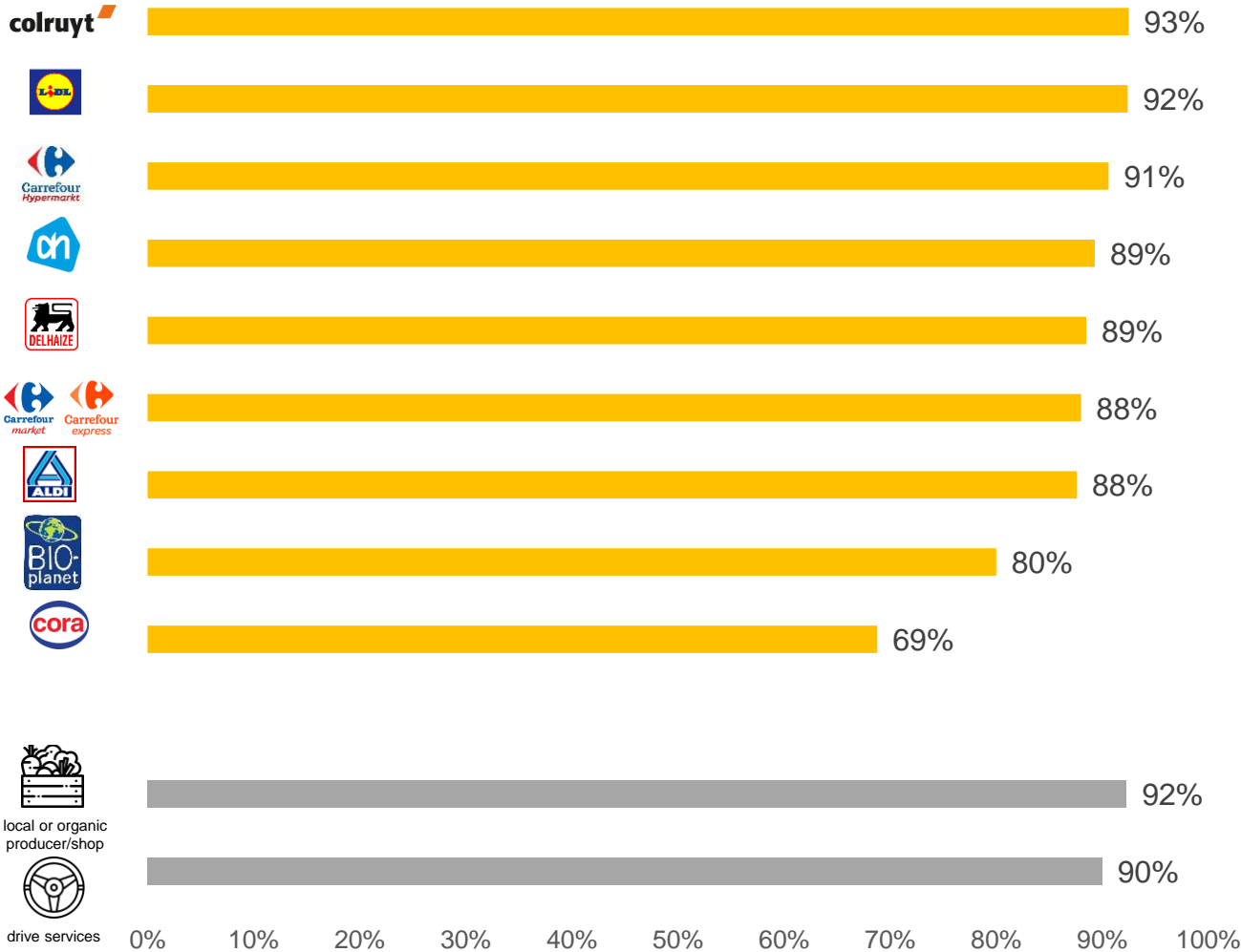
2



3

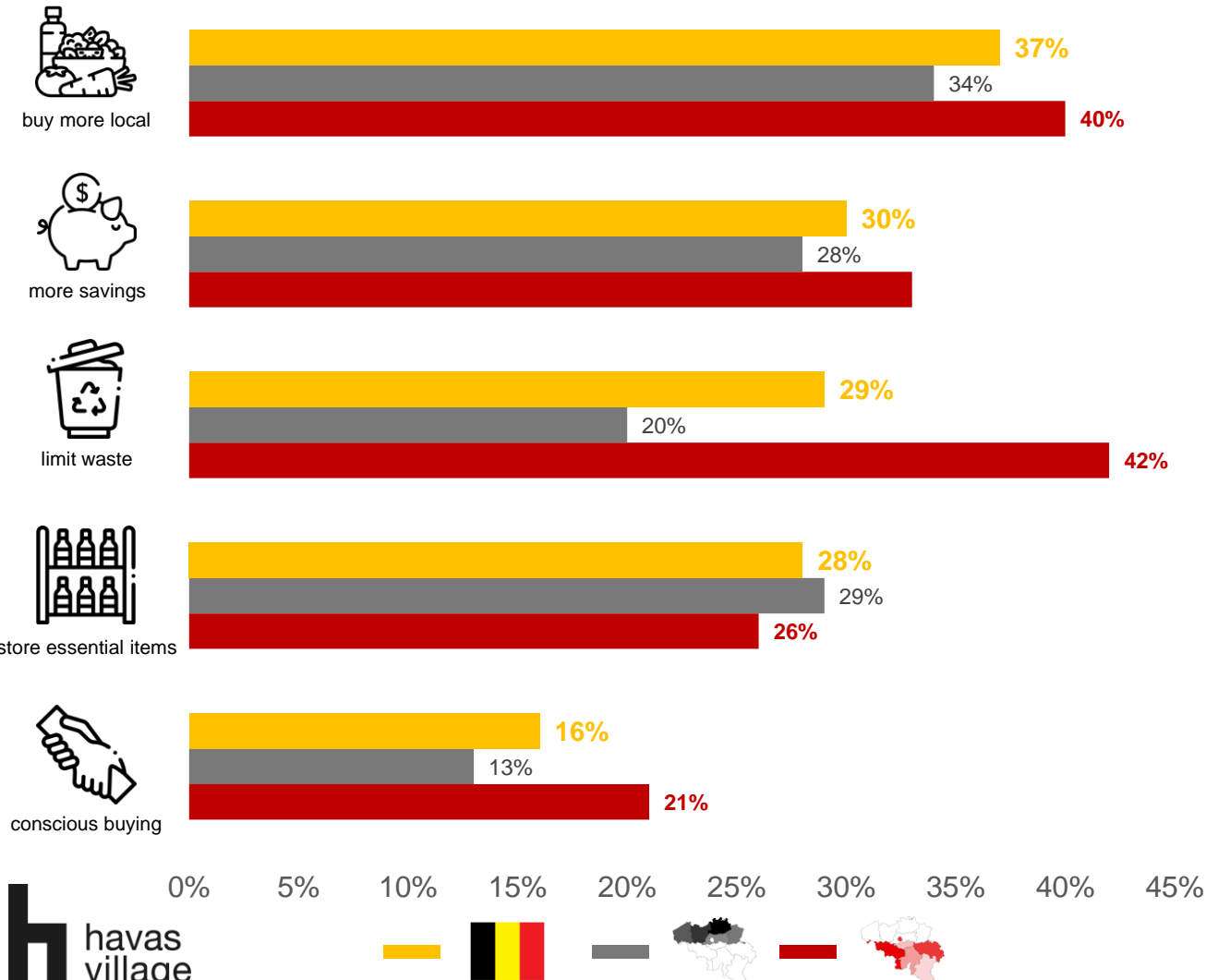


Did these retailer brands meet your expectations?

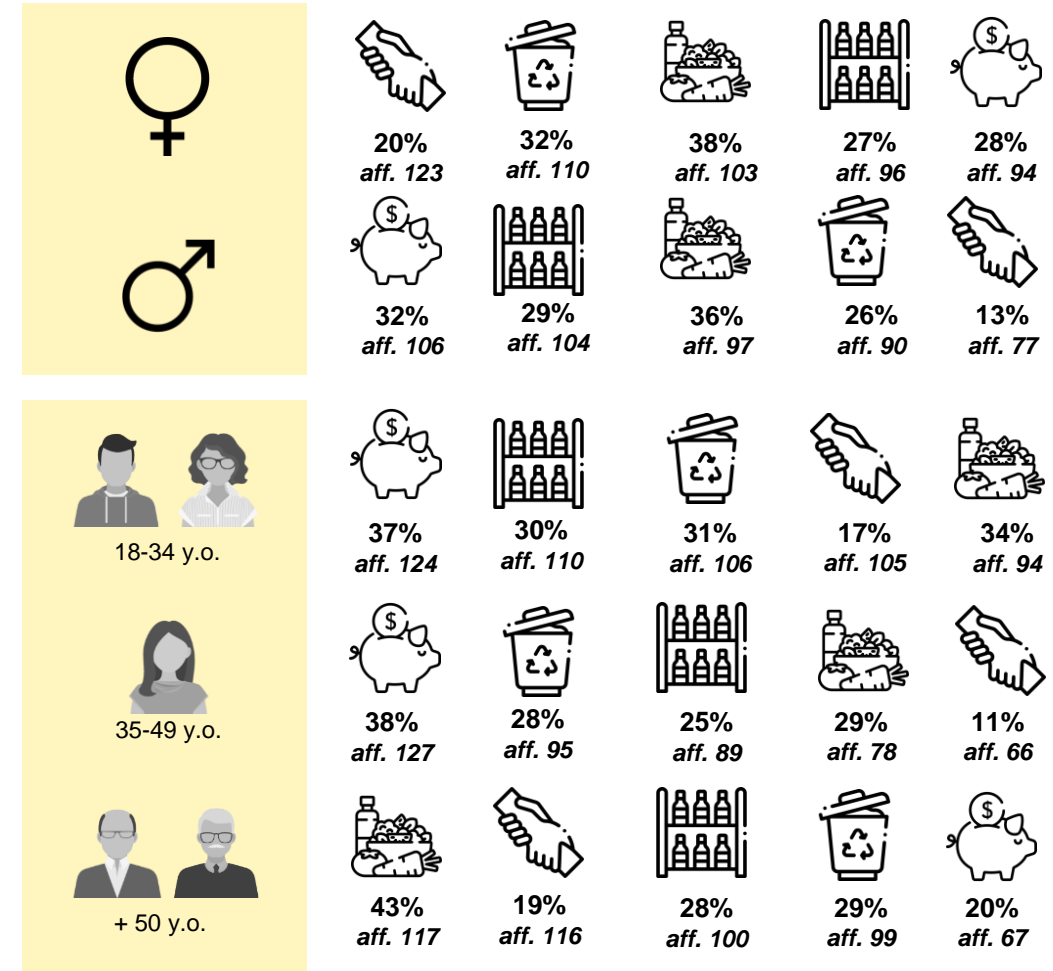


IN THE FUTURE BOOMERS & SENIORS WILL BUY MORE LOCAL

What do you think will change in your future consumption after the lockdown?



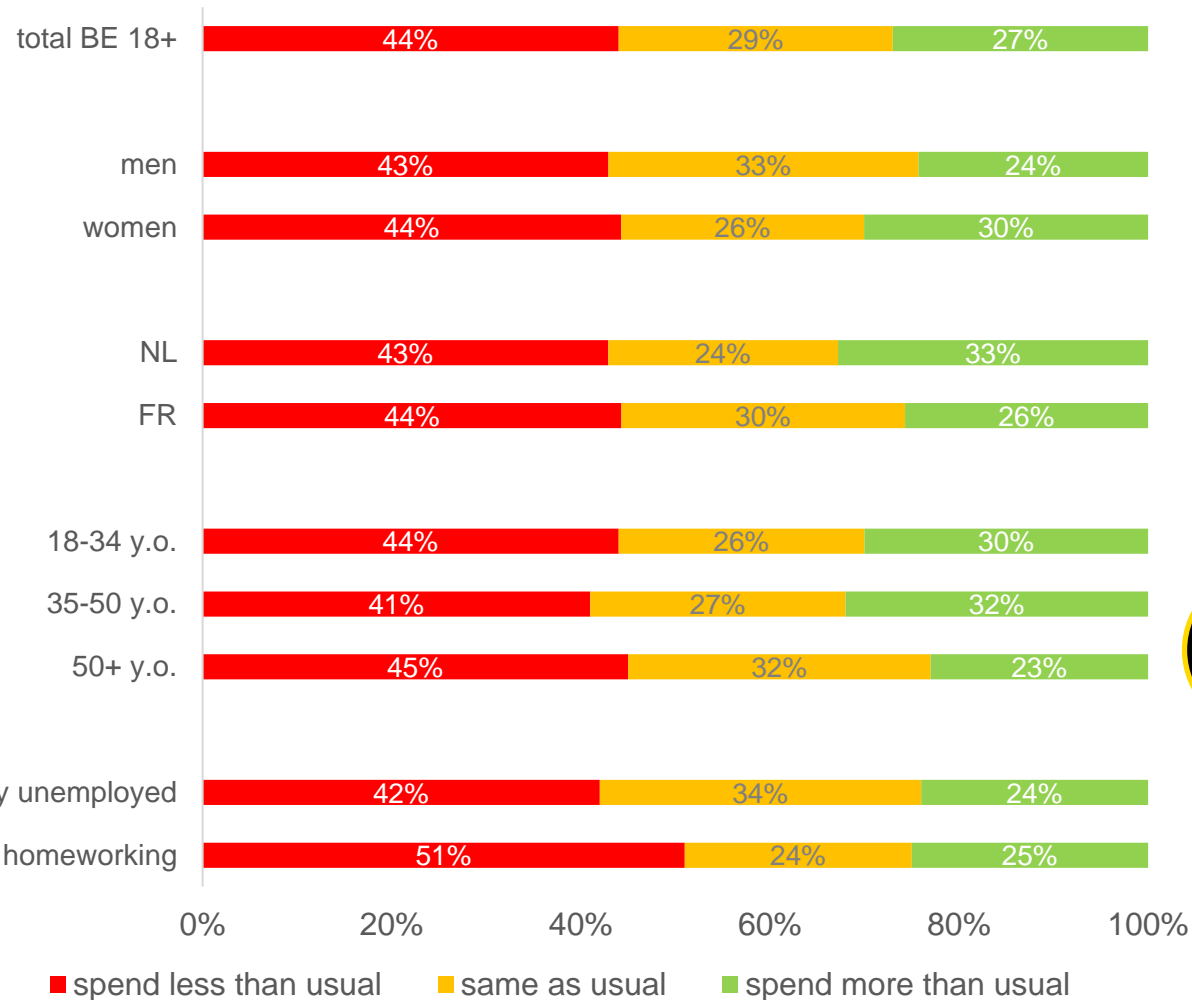
TOP 5 (ranked on affinity)



What do you think will change in your future consumption after the lockdown?

LOCKDOWN: 1 OUT OF 2 SPENT THE SAME OR MORE

Actually, do you have the impression **to spend**... ?



SPEND LESS

SAME

SPEND MORE

51% aff 118



homeworking

34% aff 117



partially unemployed

33% aff 121



Dutch-speaking

45% aff 103



+ 50 y.o.

33% aff 112



men

30% aff 110



women

4 OUT OF 10 SPEND LESS THAN USUAL

More than 1 out of 2 spent more or the same amount of money than before the lockdown. Flemish people were the most likely to spend more, followed by women and Gen Xers (32%)

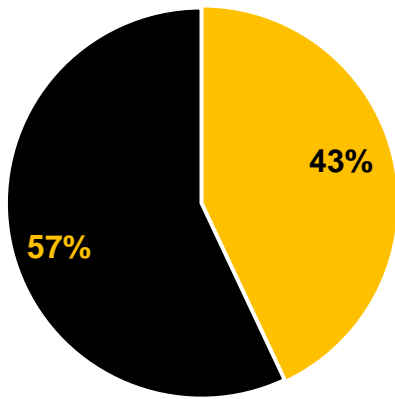
At the opposite, 1 out of 2 homeworkers spent less. Boomers and homeworkers were more cautious

Partially unemployed people, men, French-speaking people (30%) did not changed their spending habits



HOW GEN Y & GEN Z CHANGED THEIR BUYING HABITS

Your **consumption** is....



■ radically different from usual
■ the same as usual

How does this COVID19 situation **change your buying behavior**?
You do ...

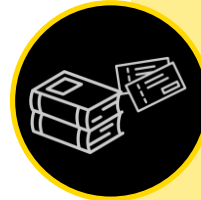
14% buy more **books & cultural products**

9% buy more **textile & clothing**

8% buy more **toys**

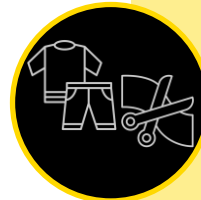
9% buy more **sports equipment**

18-34 y.o. ARE BOOKWORMS



Nearly **1 out of 4 adults between 18 and 34 y.o.** bought more **books and cultural products**. Bol.com (37%) & Amazon (21%) scored as the most useful (non-food) retailers within this age group

FASHION VICTIMS OR MASK MAKERS?



1 out of 10 women bought more **clothing & textiles** (vs 7% of men). More surprisingly: nearly 1 out of 5 adult between 18 and 34 y.o. did the same. 39% have discovered **new e-commerce sites**

(nearly) 1 OUT OF 5 YOUNG PARENTS SPOILED THEIR KIDS



19% of respondents aged between **25-34** bought more toys than before the lockdown. 1 out of 4 parents aged between **25-34** has visited **new e-commerce sites** selling toys (26%). 27% of 18-50 y.o. have mentioned "**playing with family**" as a main activity

18-34 y.o. BUY MORE SPORT PRODUCTS



1 out of 5 young adults bought more **sports equipment** (19%). French-speaking people (10%) also bought more sport products. Food for thought: Decathlon ranked second to Amazon as the most useful non-food retailer among French-speaking

POST-LOCKDOWN ASPIRATIONS: NORMALITY, FAMILY AND A GOOD MEAL

*What will you do **once the lockdown is over**?*



LAST TIP FOR TRAVEL SECTOR: MONITOR ONLINE INTENTION & HUNGER FOR ESCAPE

Tourisme: le Belge veut ses vacances, la Wallonie teste ses chances

Un sondage confirme la volonté des Belges de maintenir leurs vacances, quitte à voyager un peu moins loin. La Wallonie veut en profiter pour séduire de nouveaux venus.



Les activités privilégiées pour les vacances correspondent assez naturellement au potentiel wallon, notamment les visites des villes et des villages - ici, la petite cité de Durbuy - Belga.



Un Belge sur quatre (24 % en communauté Wallonie-Bruxelles, 27 % en Flandre) pense partir en vacances cet été. Si on regarde la plage à moitié vide plutôt que la plage à moitié pleine, le sondage réalisé sur les « intentions et adaptations de vacances suite à la crise du coronavirus » montre que 55 % des francophones et 59 % des néerlandophones estiment qu'ils ne partiront certainement ou probablement pas en vacances cet été. Environ la moitié changera de projet de vacances (43 % Wallonie-Bruxelles, 52 % Flandre) mais plus de la moitié maintiendra les dates initialement prévues pour les vacances, tandis que 34 % (Wallonie-Bruxelles) à 26 % (Flandre) envisagent de partir en automne plutôt qu'en été. Enfin, en moyenne,

Belgians want their holidays

1 OUT OF 4 BELGIAN IS THINKING OF GOING ON VACATION THIS SUMMER

(Le Soir 05/05/2020)

55% POSTPONE TRAVEL PLANS



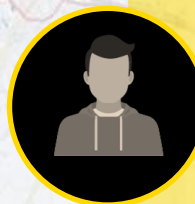
8 out of 10 travel *intentionalists* have postponed their plans to purchase transport & travel accommodations. But nearly 1 out of 10 (9%) has discovered a new travel site during the lockdown

BOOMERS MORE LIKELY TO POSTPONE TRAVEL PLANS



68% of people aged 65+ had plans to purchase transport/travel accommodations before the lockdown. **85% postponed** their plans till the situation recovered. **Younger Boomers (50-64 y.o.) seem even more worried: 87% postponed**

YOUNG ADULTS ARE READY TO BOOK



75% of 18-34 y.o. had plans buying transport or travel accommodation before the lockdown. 78% have already postponed these plans. **Nearly 1 out of 5 (18%) has discovered a new travel site** during the lockdown

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



PRESS & WEB

For our last edition, we have taken a look on the differences between men and women, between young and old in April 2020:

- Flemish Boomers & Seniors were more into local news. Younger age groups more into financial news
- French-speaking women spent more time on news sites than men
- Thematics Flair Nat. & Libelle-Femmes, the complementary mix: volume of surfers with Flair, more attention & time spent with Libelle

And social? Cost per Reach is one step closer to hitting the bottom



THE MEDIA ATTENTION HAS SHIFTED

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



44%

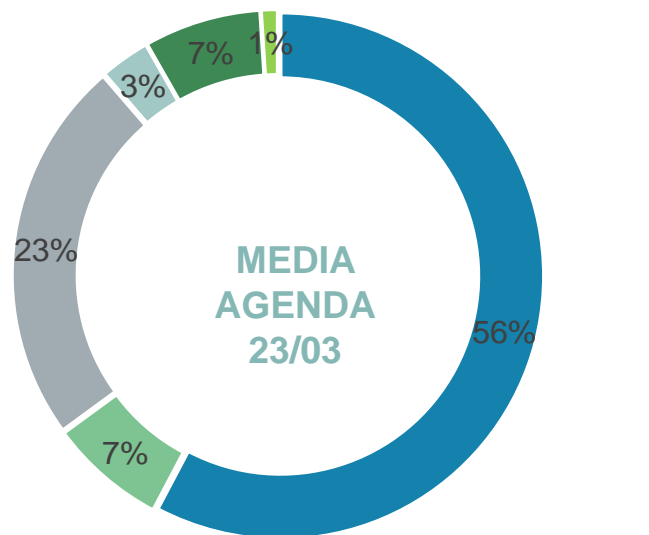
of Belgians think that media spend **too much time** discussing about the crisis

VS

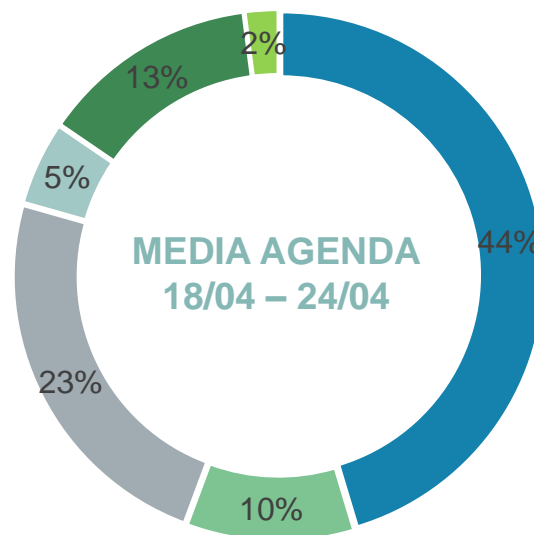
45%

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

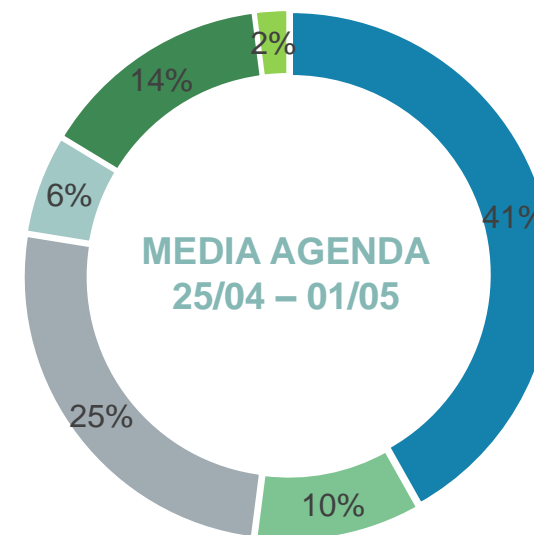
whyte DEDICATED
corporate affairs



■ Coronavirus ■ Economy ■ Virus & Infection
■ Security ■ Companies ■ Technologies



■ Coronavirus ■ Economy ■ Virus & Infection
■ Security ■ Companies ■ Technologies



■ Coronavirus ■ Economy ■ Virus & Infection
■ Security ■ Companies ■ Technologies

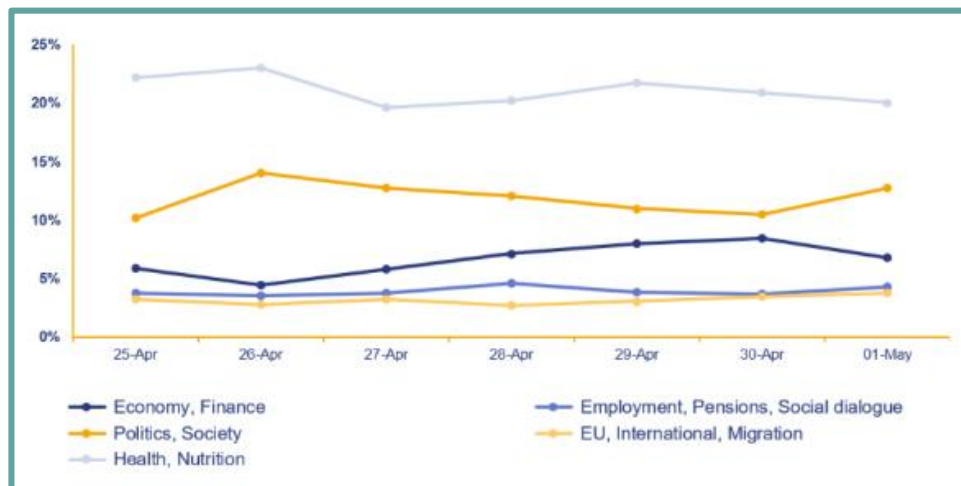


LESS ATTENTION FOR COVID-19 LAST WEEK

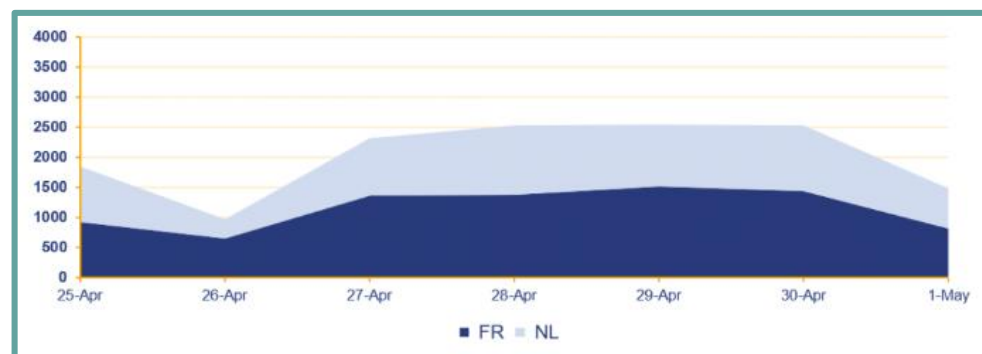
After a huge drop in the number of articles and mentions of Coronavirus in the Belgian on- & offline press during the Easter Holidays, there has been a slight upturn this week



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



Number of articles over time



11-17 April 2020

15.909 articles*

- 13,23% compared to the previous week

550.908 mentions*

- 12,85% compared to the previous week

18-24 April 2020

16.159 articles*

+ 1,57% compared to the previous week

573.123 mentions*

+ 4,03% compared to the previous week

25 April – 1 May 2020

14.248 articles*

- 11,83% compared to the previous week

498.635 mentions*

- 13% compared to the previous week

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



SLIGHT DECLINE IN « LOCAL »

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



TOP 3 audience share (05/05)

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



27%

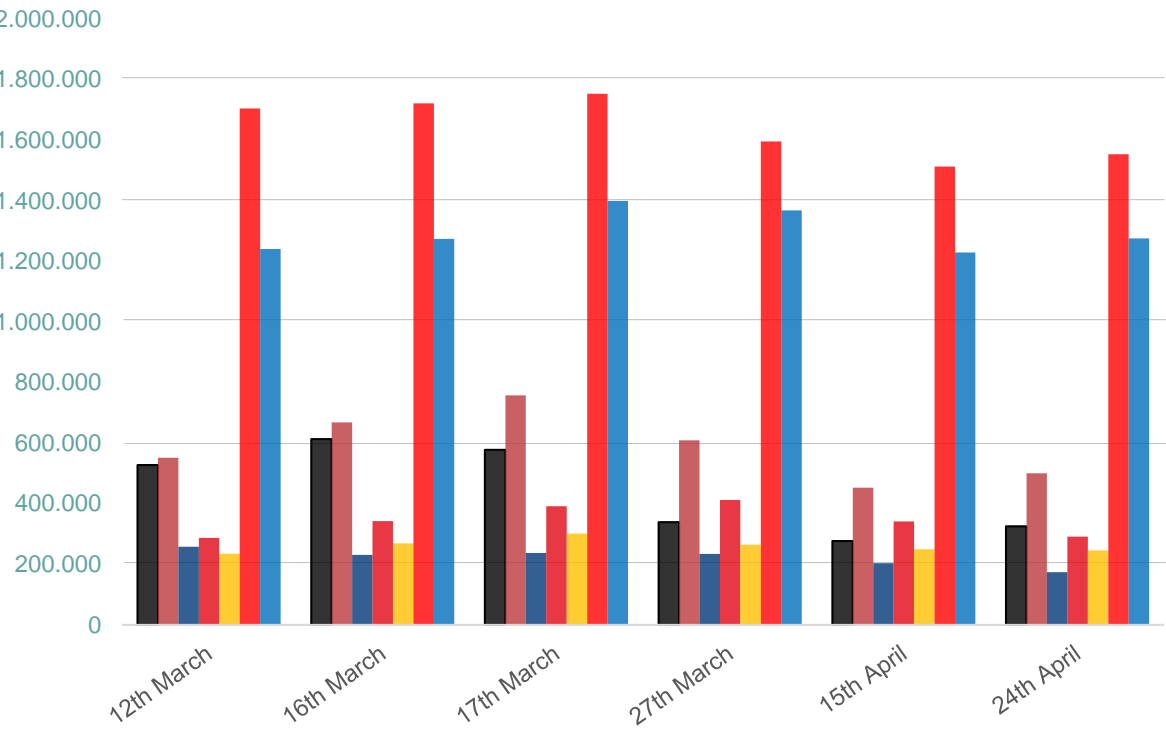
Het Nieuwsblad

21%

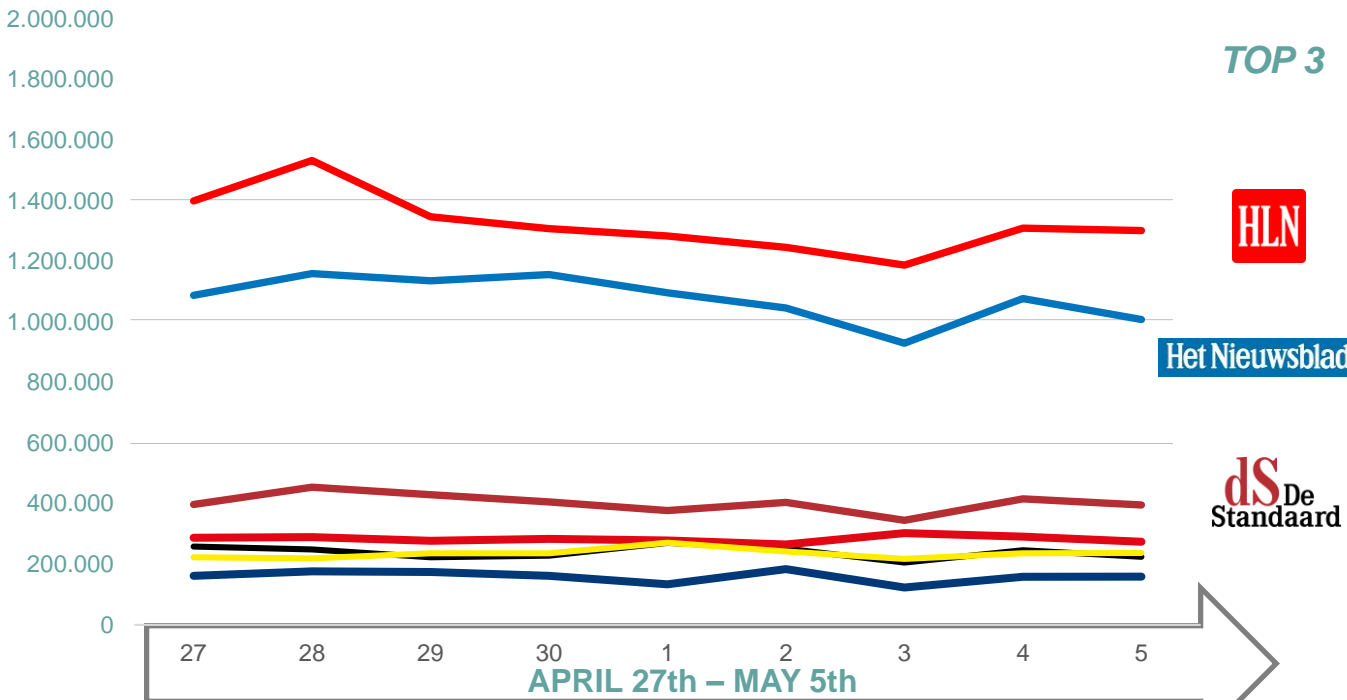


8%

real users



real users



TOP 3



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

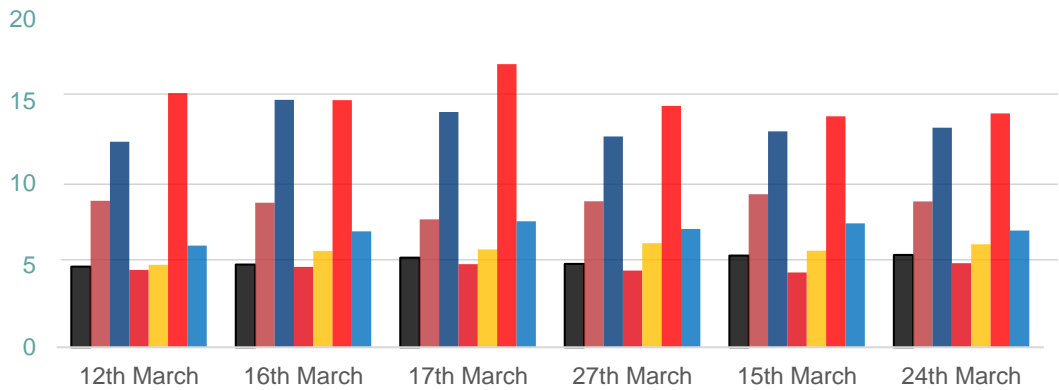


FINANCE NEWS (STILL) GET MORE SHARE OF TIME

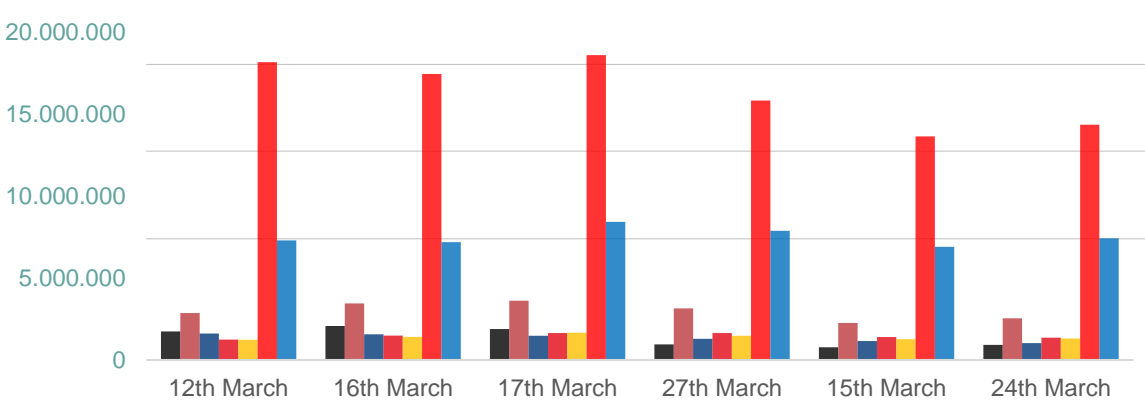
Champion HLN challenged by De Tijd in share of time



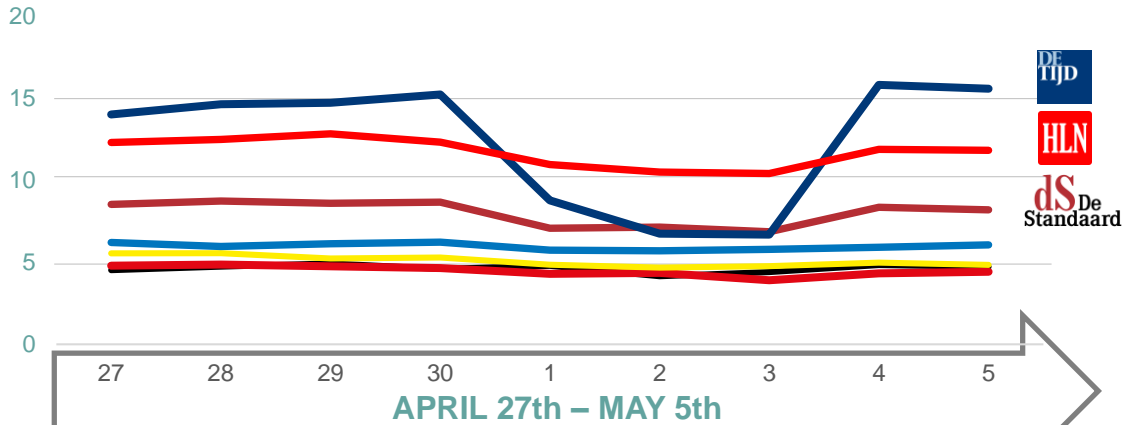
avg. time spent
(min.)



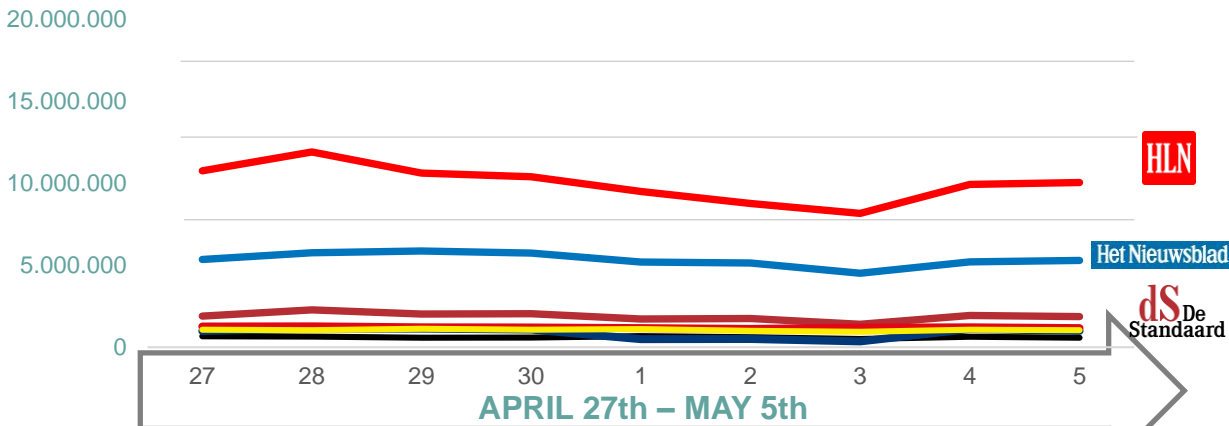
pageviews



avg. time spent
(min.)



pageviews



— DeMorgen. — dS De Standaard — DE Tijd — GVA — HET BELANG VAN LIMBURG — HLN — Het Nieuwsblad

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



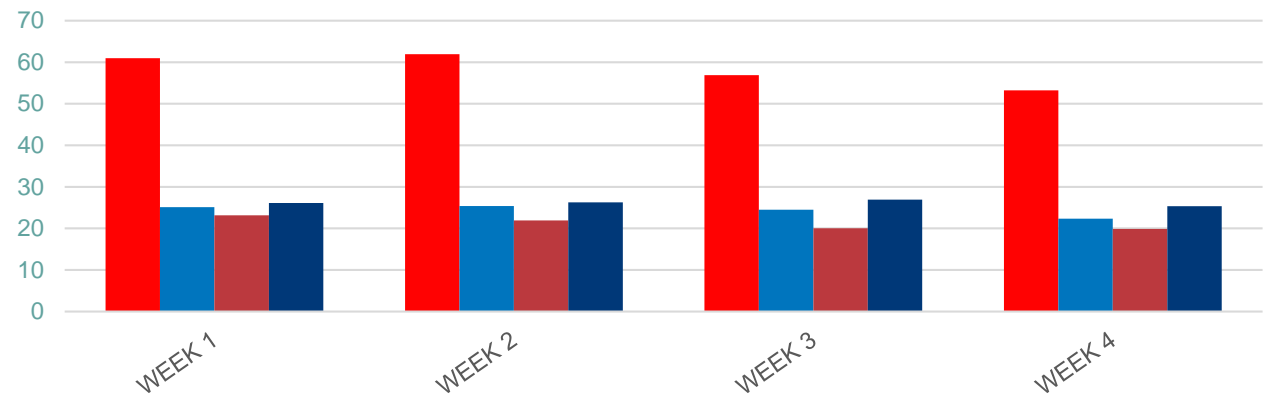
FLEMISH WOMEN SPENT MORE TIME ONLINE THAN MEN IN APRIL

Especially on days with big announcements from the government

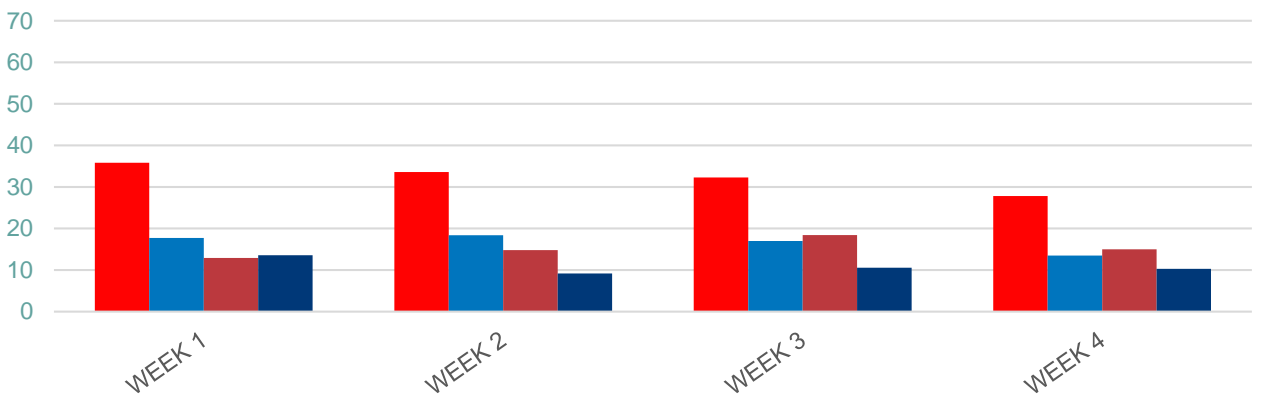


ATS (minutes)

APRIL 2020

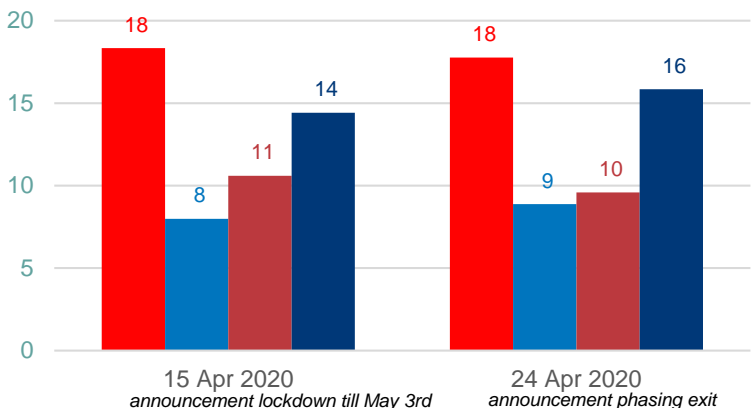


ATS (minutes)

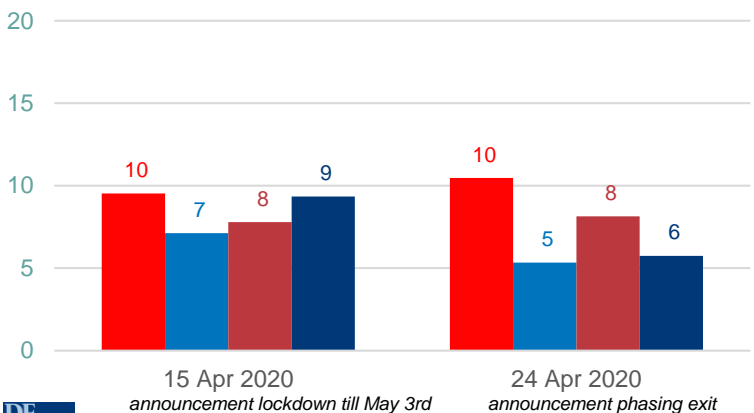


Target split :
15/04 : W = 51%, M = 49% 24/04 : W = 51%, M = 49%

ATS (minutes)



ATS (minutes)





GEN XYZ MORE INTO FINANCIAL NEWS THAN BOOMERS

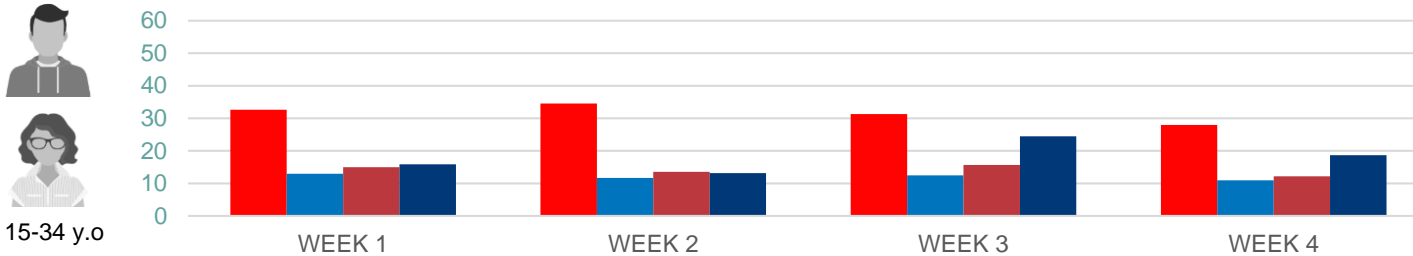
Boomers more into local news



ATS (minutes)

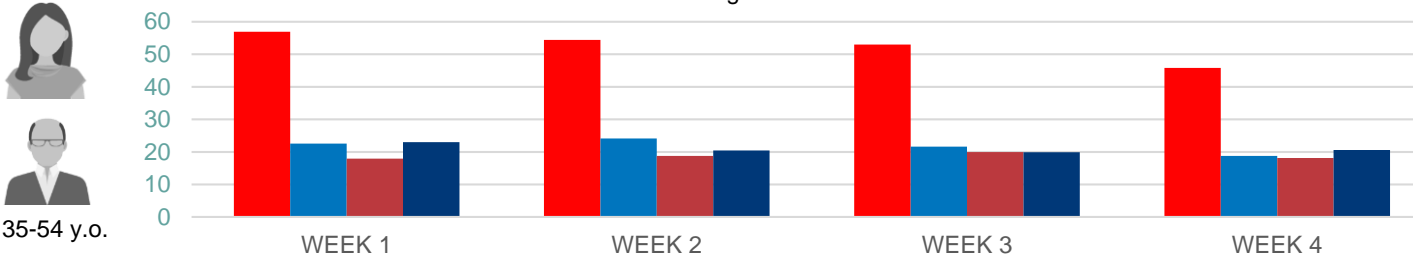
APRIL 2020

Target size : 29%



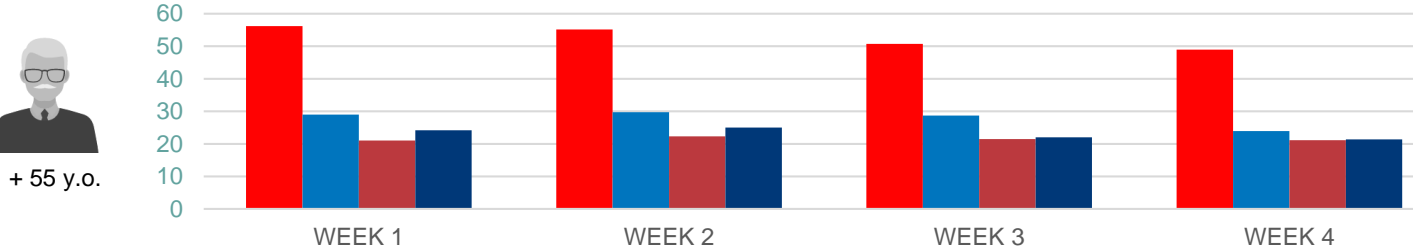
ATS (minutes)

Target size : 32%



ATS (minutes)

Target size : 36%

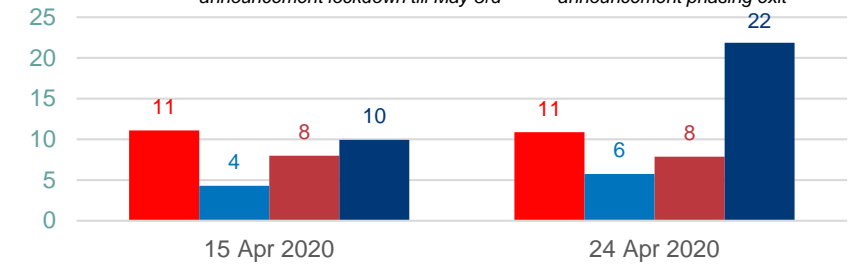


ATS (minutes)

Target size :

15/04 : 30%
announcement lockdown till May 3rd

24/04 : 30%
announcement phasing exit

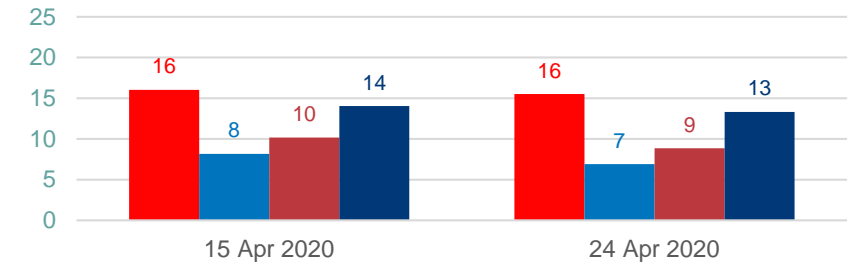


ATS (minutes)

Target size :

15/04 : 33%
announcement lockdown till May 3rd

24/04 : 33%
announcement phasing exit

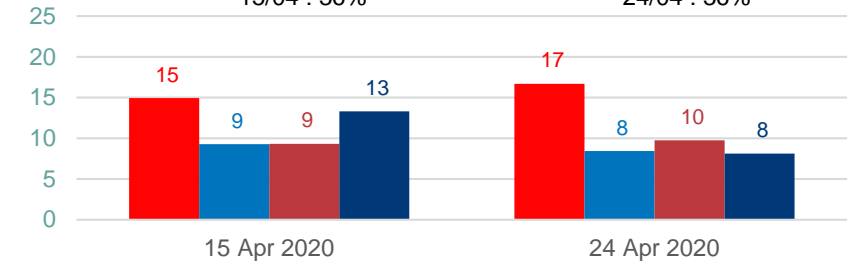


ATS (minutes)

Target size :

15/04 : 36%
announcement lockdown till May 3rd

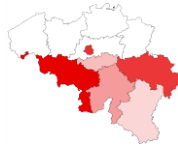
24/04 : 36%
announcement phasing exit





LE SOIR & DH HEAD TO HEAD FOR THE SILVER MEDAL

Leader Sudinfo in decline



TOP 3 audience share (05/05)
(the share of the audience of the media in the total audience of all media)

Sudinfo.be

12%

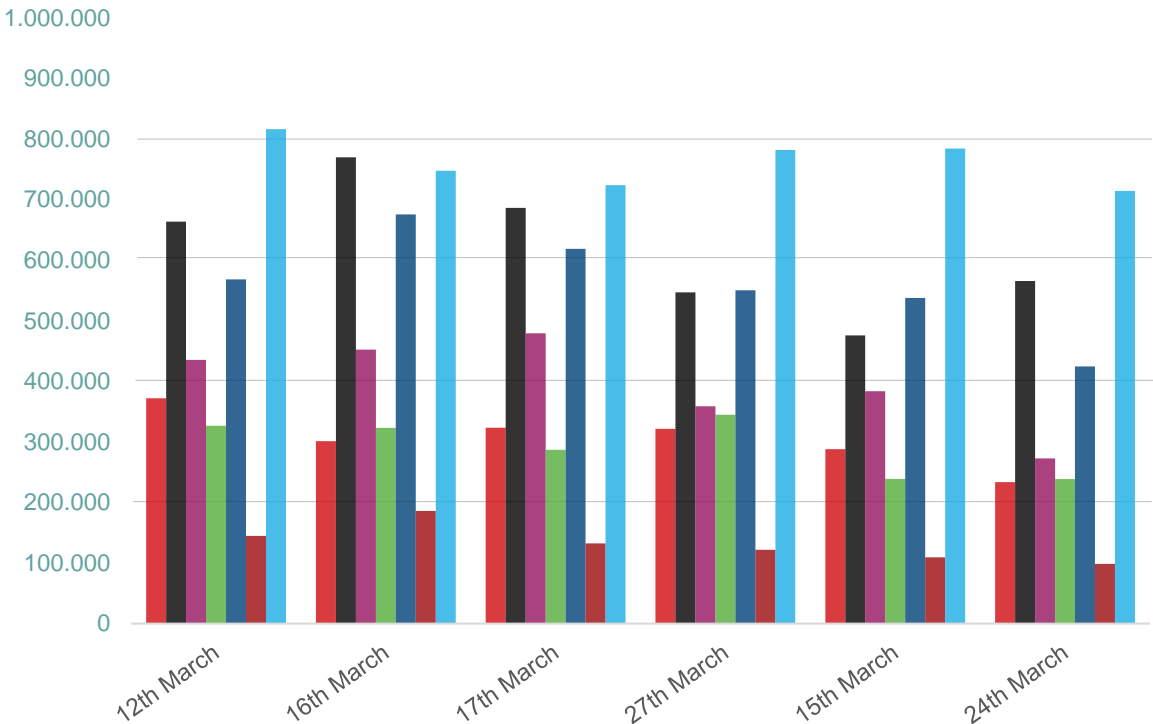


9%

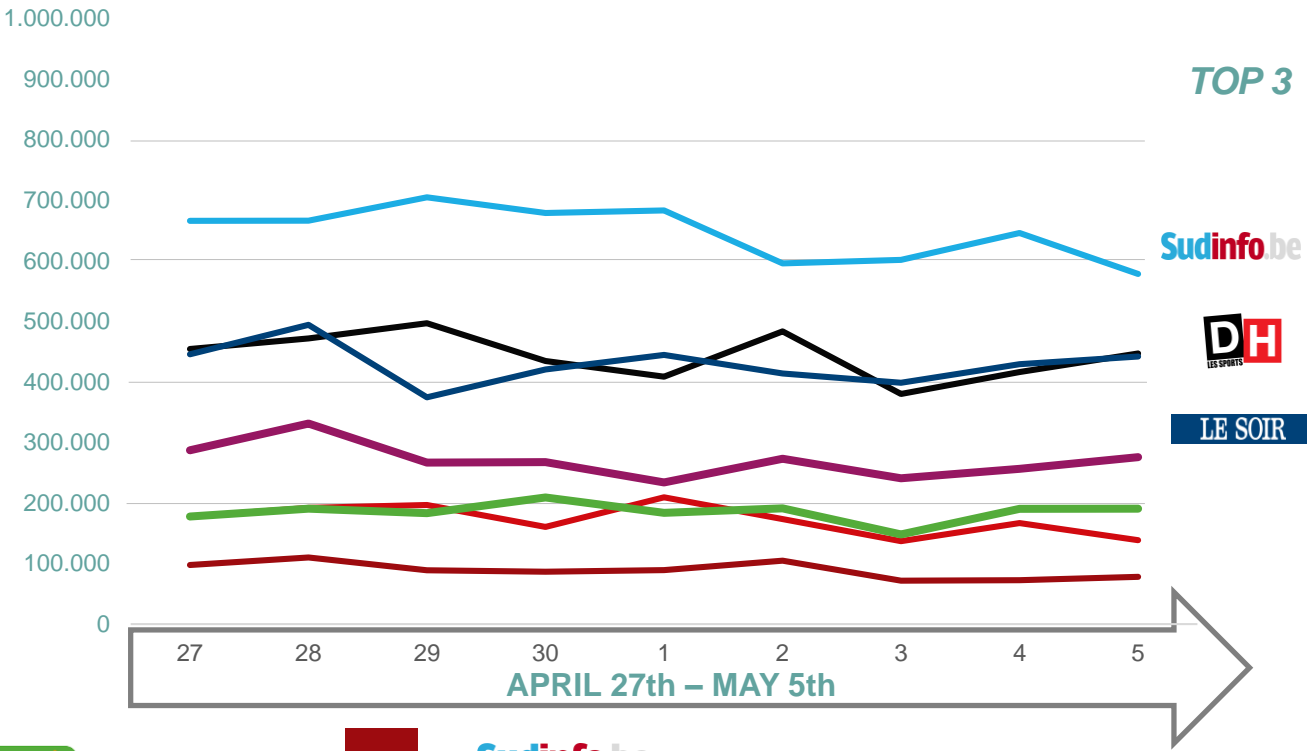
LE SOIR

9%

real users



real users



TOP 3

Sudinfo.be



LE SOIR

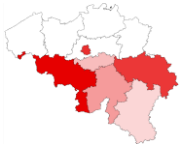


Source : Gemius/CIM - gemiusAudience study: Multiplatform - Population 12+

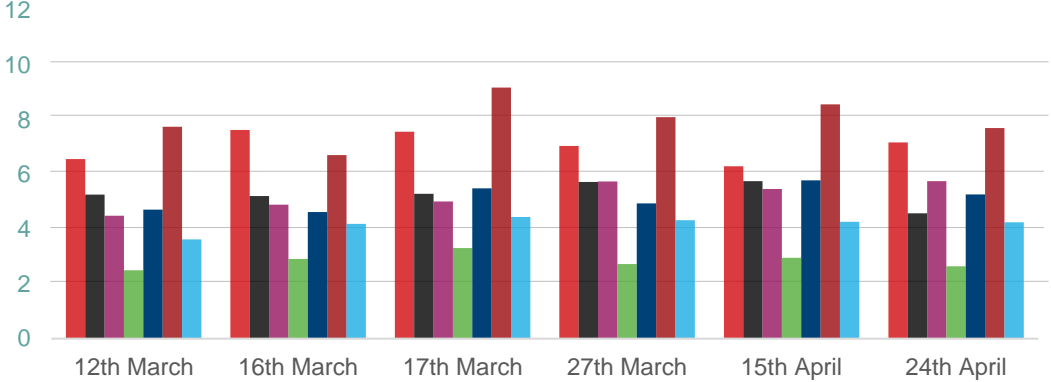


WALLOONS SNACK NEWS ... AND MONITOR THE STOCK MARKET

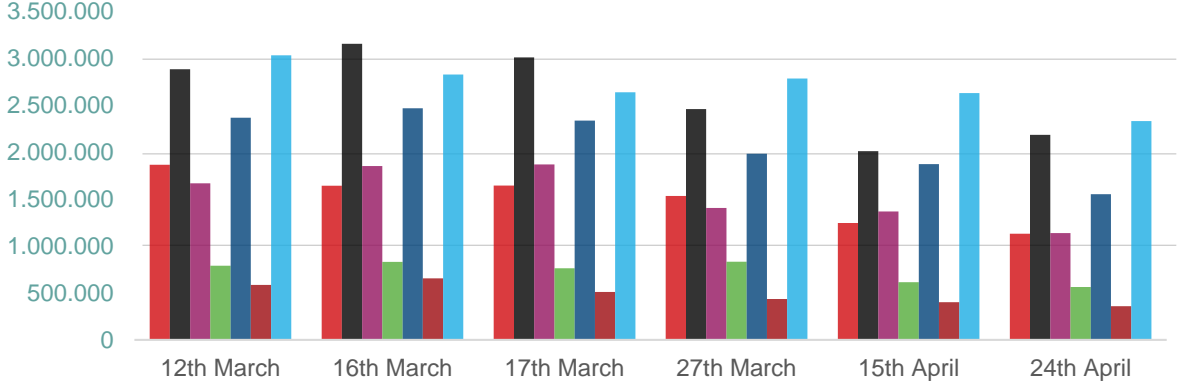
L'Echo & 7sur7 get all the attention



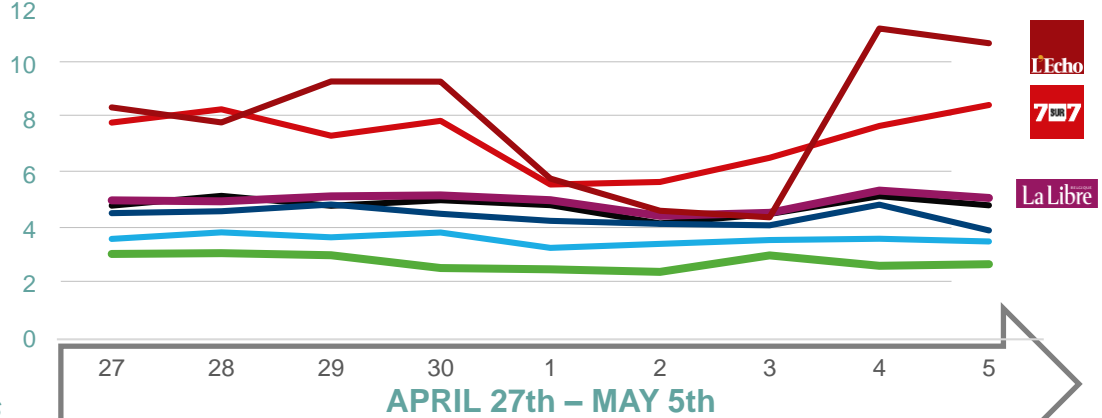
avg. time spent (min.)



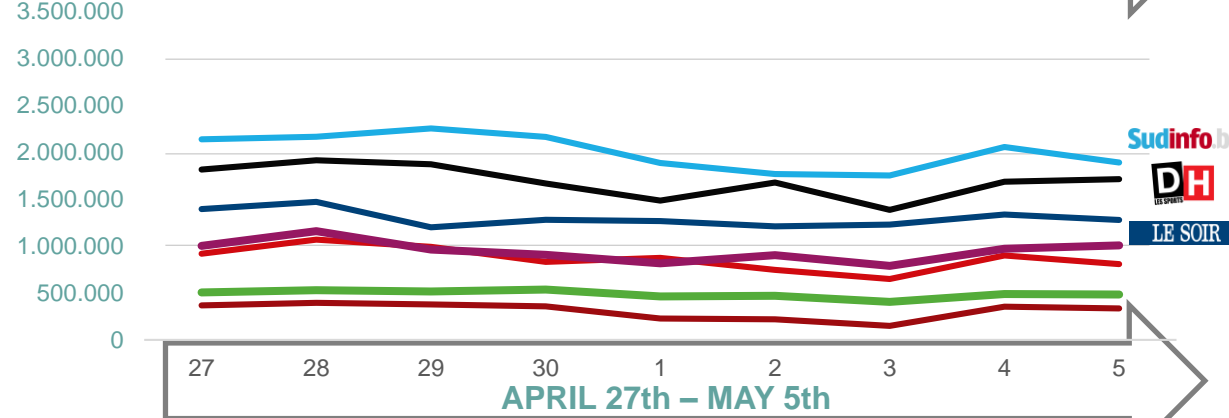
pageviews



avg. time spent (min.)



pageviews

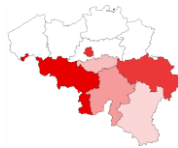


Source : Gemius/CIM - gemiusAudience study: Multiplatform - Population 12+



FR WOMEN SPENT MORE TIME ONLINE THAN MEN IN APRIL

Especially via L'Echo on days with big announcements from the government

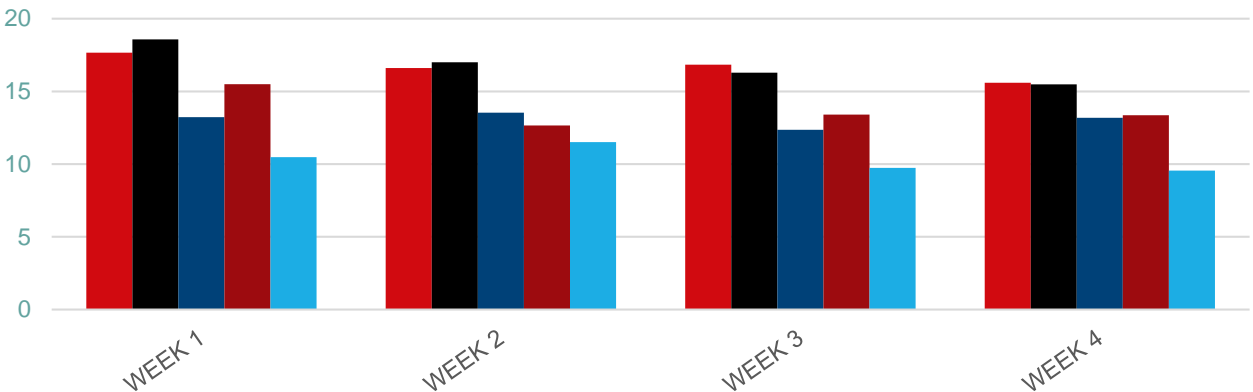


Target size :
15/04 : F = 51%, H = 49% 24/04 : F = 51%, H = 49%

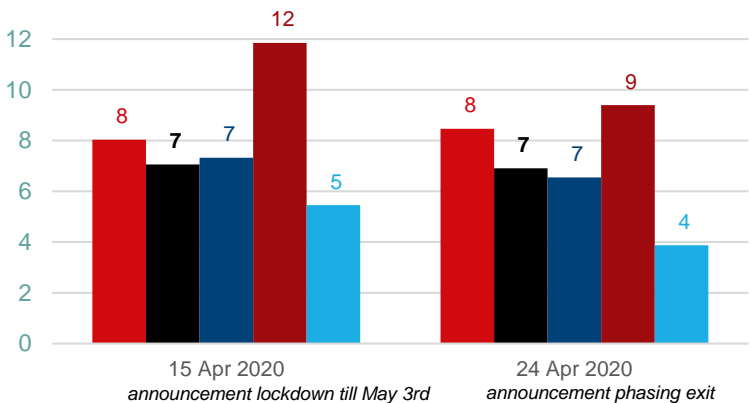


ATS (minutes)

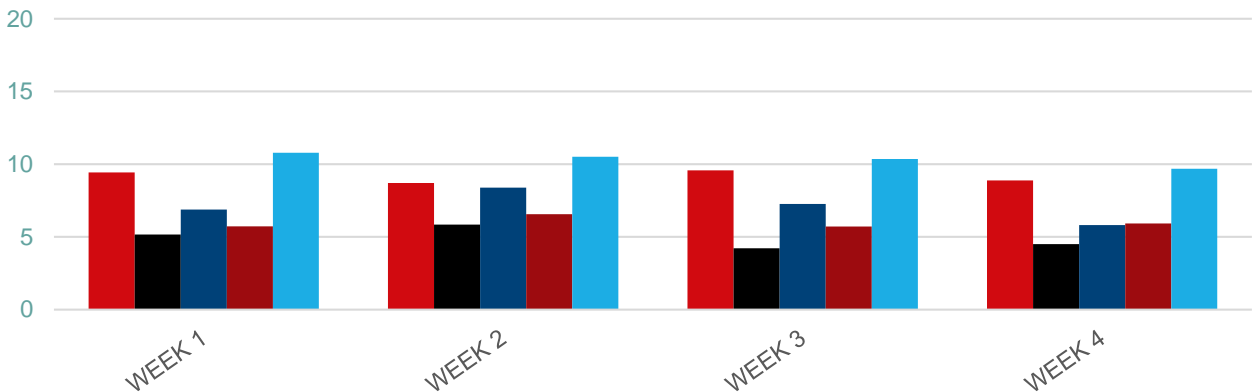
APRIL 2020



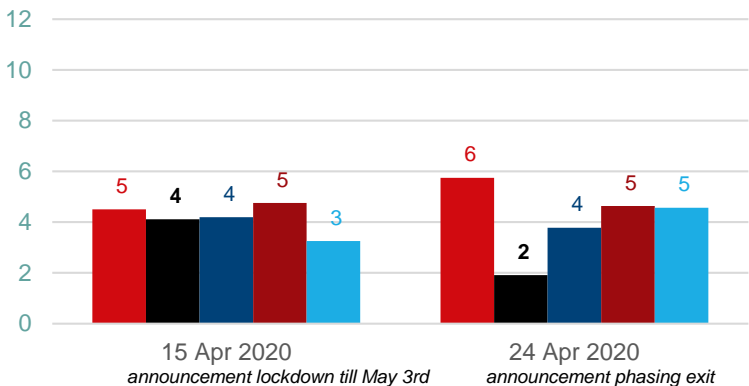
ATS (minutes)



ATS (minutes)



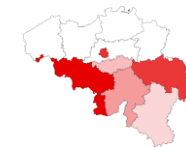
ATS (minutes)





GEN YZ LESS INTO NEWS THAN OLDER GENERATIONS

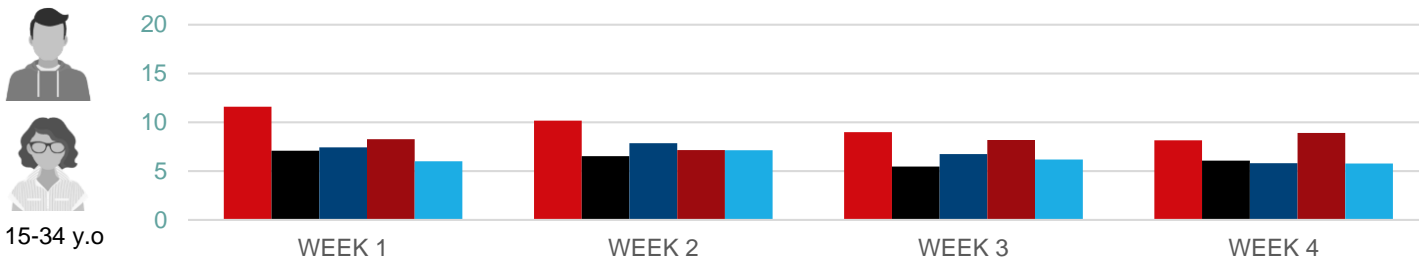
Compared to Boomers and Gen X, Gen YZ spent less time on digital newsbrands in April



ATS (minutes)

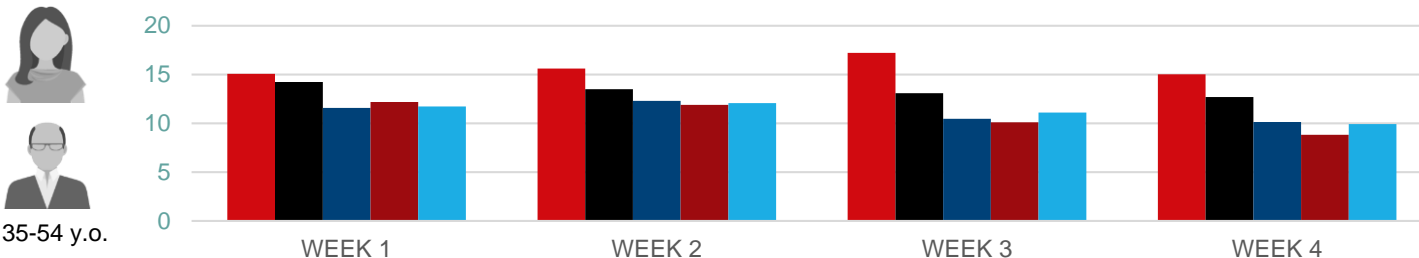
APRIL 2020

Target size : 29%



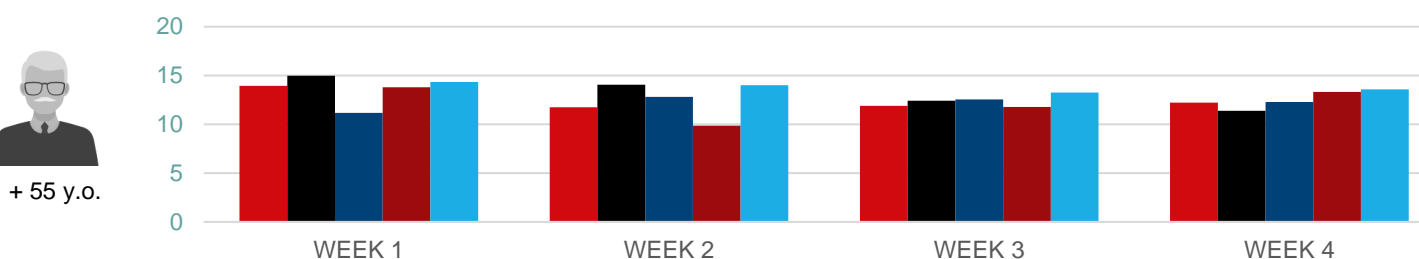
ATS (minutes)

Target size : 32%



ATS (minutes)

Target size : 36%



ATS (minutes)

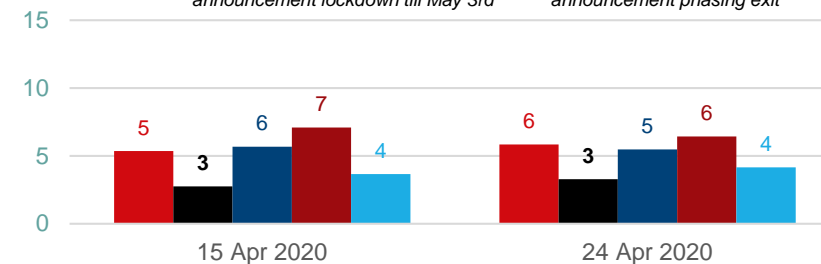
15/04 : 30%

Target size :

24/04 : 30%

announcement lockdown till May 3rd

announcement phasing exit

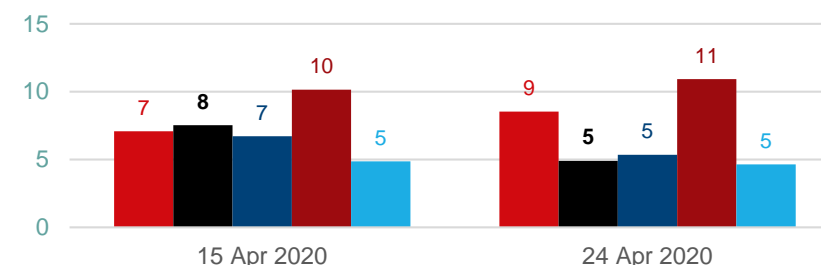


ATS (minutes)

15/04 : 33%

Target size :

24/04 : 33%

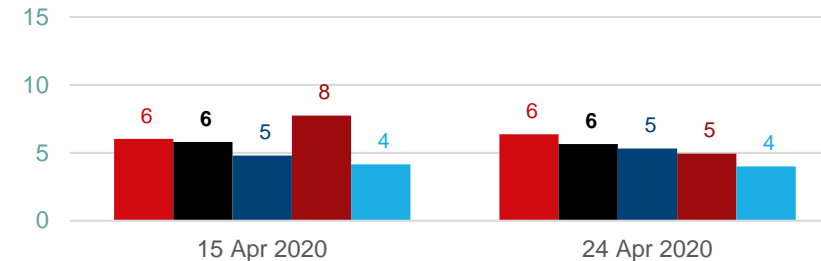


ATS (minutes)

15/04 : 36%

Target size :

24/04 : 36%





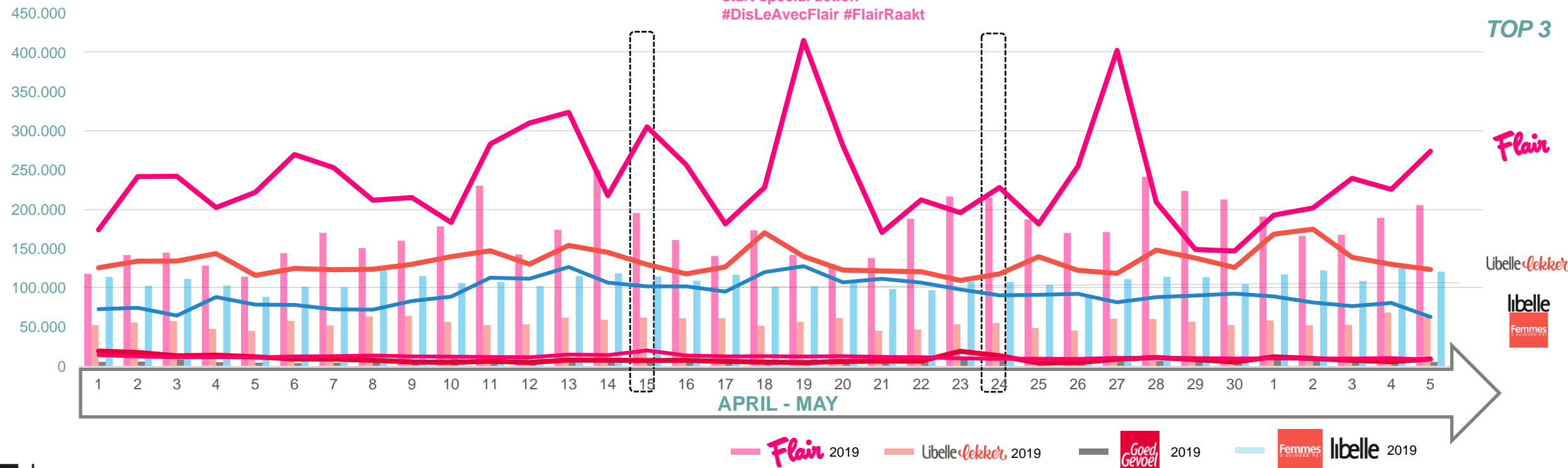
THEMATIC MAGS DO NOT KNOW THE CRISIS (online)

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



evolution visits			Flair	libelle Femmes	Libelle lekker	Goed Gevoel
01/03/2019 > 12/03/2019	VS	PRE-LOCKDOWN 2020 (01/03/2020 > 12/03/2020 VS 13/03/2020)	+ 31%	+ 11%	- 40%	- 24%
13/03/2019 > 05/05/2019	VS	LOCKDOWN 2020 (13/03/2020 > 05/05/2020)	+ 43%	- 20%	+ 97%	+ 216%
PRE-LOCKDOWN 2020	VS	LOCKDOWN 2020	+ 14%	- 38%	+ 44%	+ 45%

visits



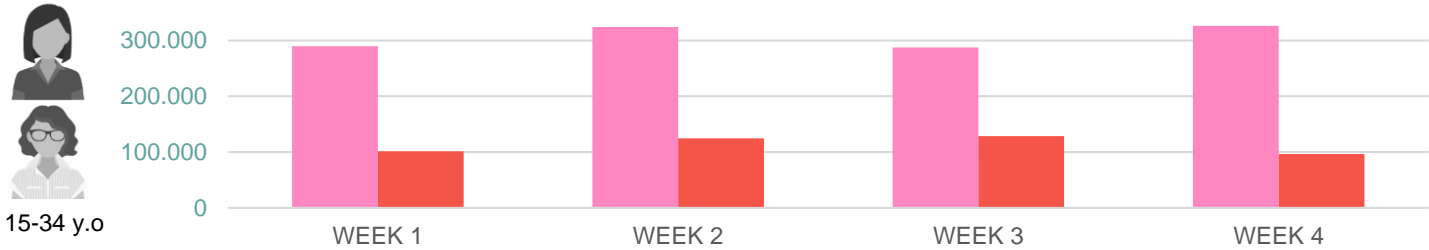


FLAIR APPEALS TO EVERY WOMEN

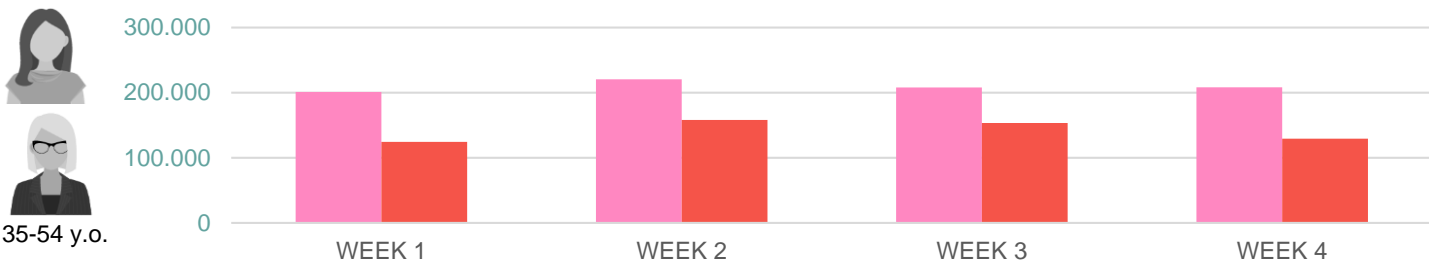
Thematics: it has never been a matter of age... It's about lifestyle and state of mind



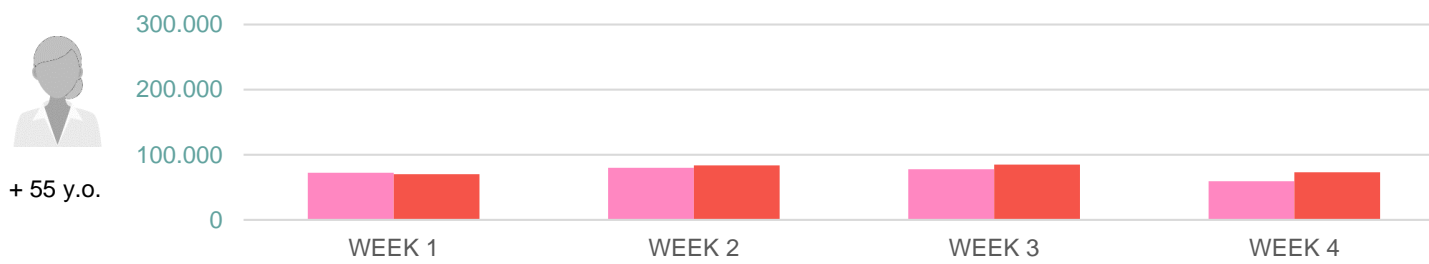
real users



real users



real users

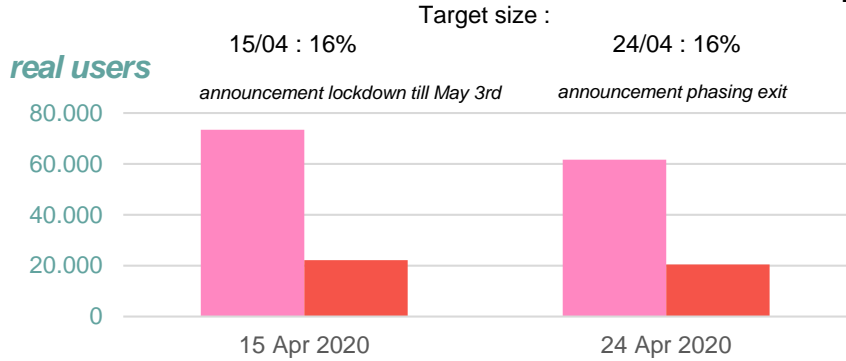


WEEK 1 = 06/04 > 12/04
WEEK 2 = 13/04 > 19/04
WEEK 3 = 20/04 > 26/04
WEEK 4 = 27/04 > 03/05

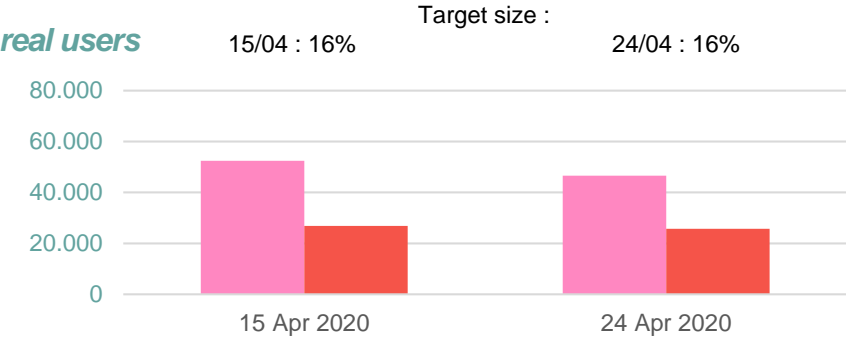


Source : Gemius/CIM - gemiusAudience study: Multiplatform - Population 12+. Weeks always from Monday to Sunday

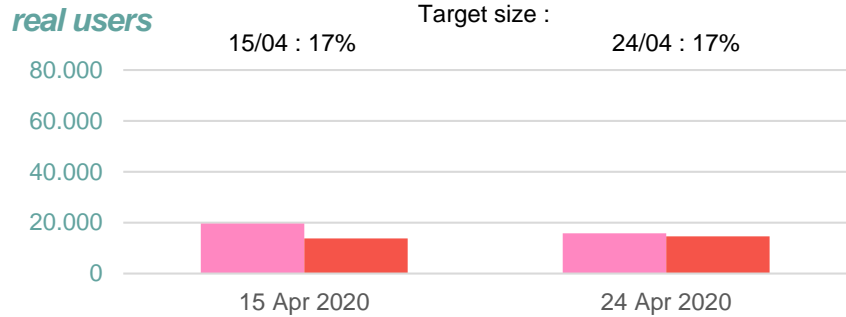
real users



real users



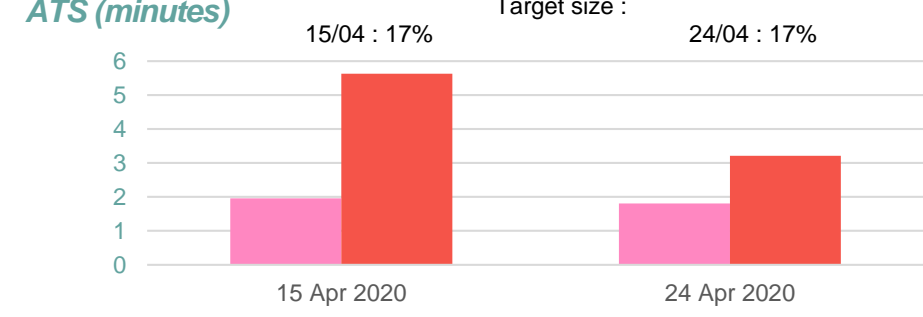
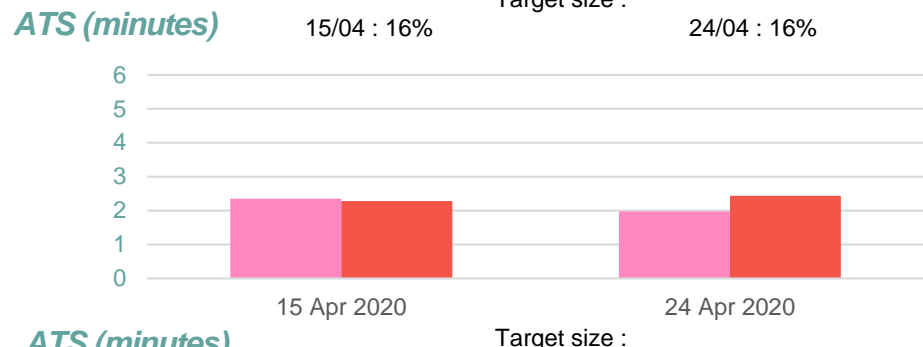
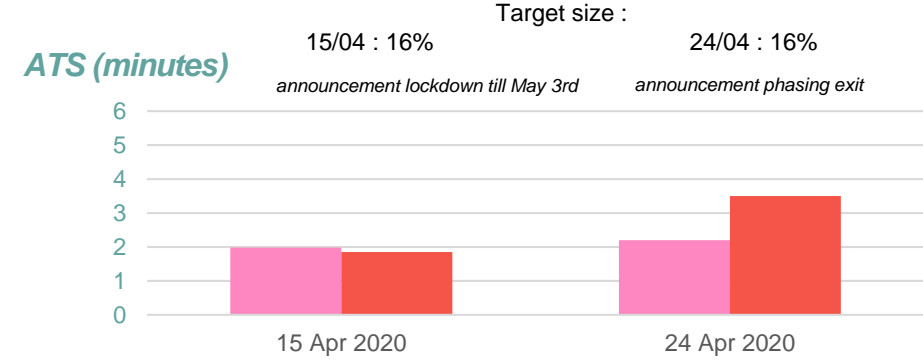
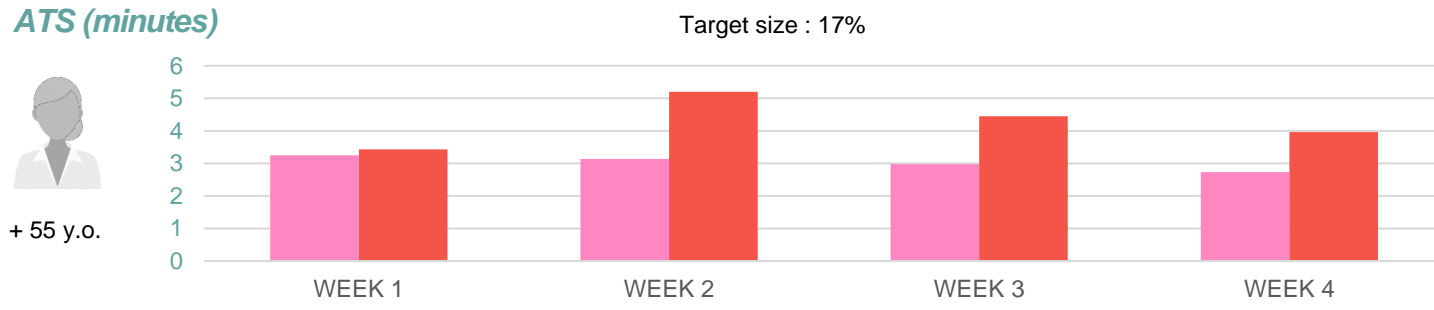
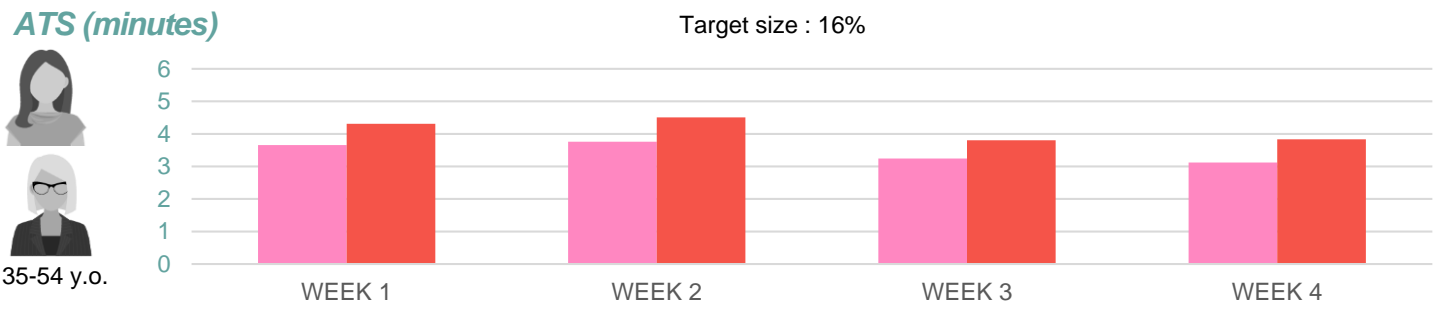
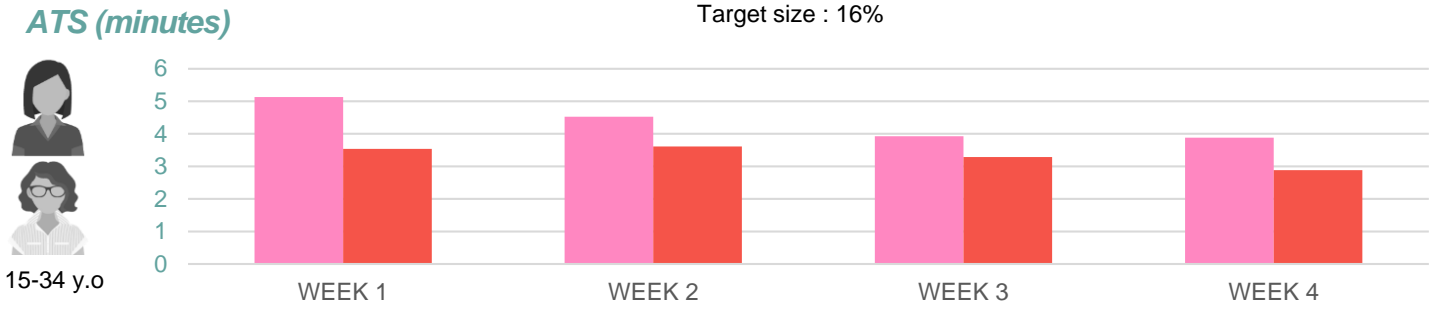
real users





SPENDING TIME WITH BFF FEMMES & LIBELLE

Flair benefits from a huge fanbase across every age group but when it comes to time spent online, Gen X and Boomers chose for Femmes & Libelle in April



h havas village

WEEK 1 = 06/04 > 12/04
WEEK 2 = 13/04 > 19/04
WEEK 3 = 20/04 > 26/04
WEEK 4 = 27/04 > 03/05

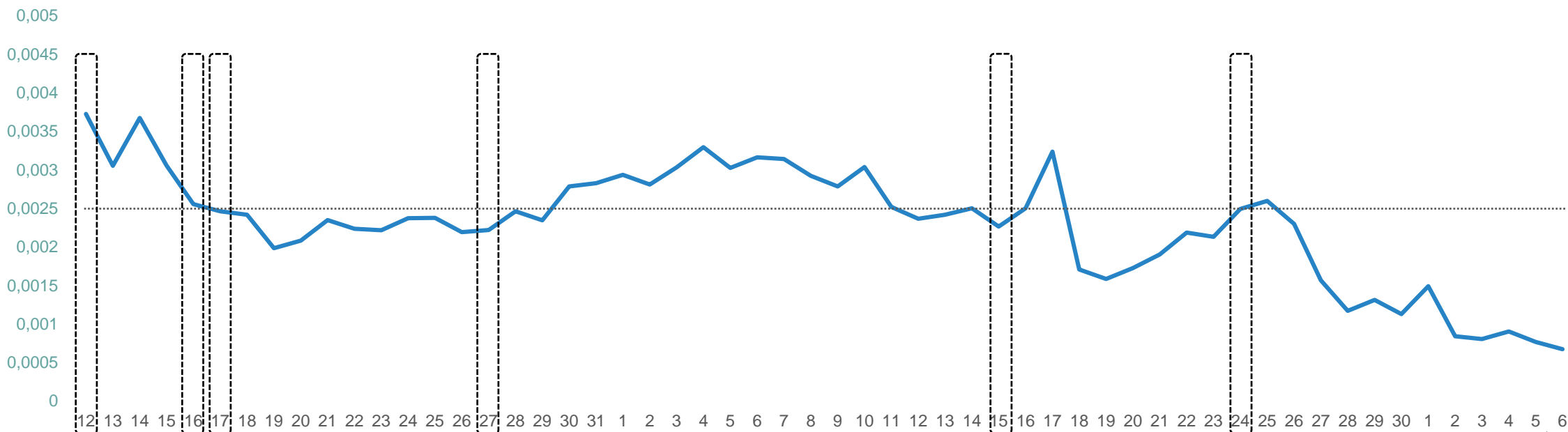


COST PER REACH ONE STEP CLOSER TO HITTING BOTTOM



Dramatic decrease since Sunday 26th

avg CPR



MARCH 12th – MAY 06th



TELEVISION

Spring 2020 will be forever associated with the great revival of linear TV.

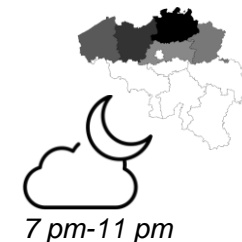
We have already demonstrated the power of news and the need for entertainment and escapism.

Our business partner RMB published a very interesting report on the content offer VS the content consumption on the main FR TV channels with a particular focus on fiction. Guess what? People returned to longer formats.

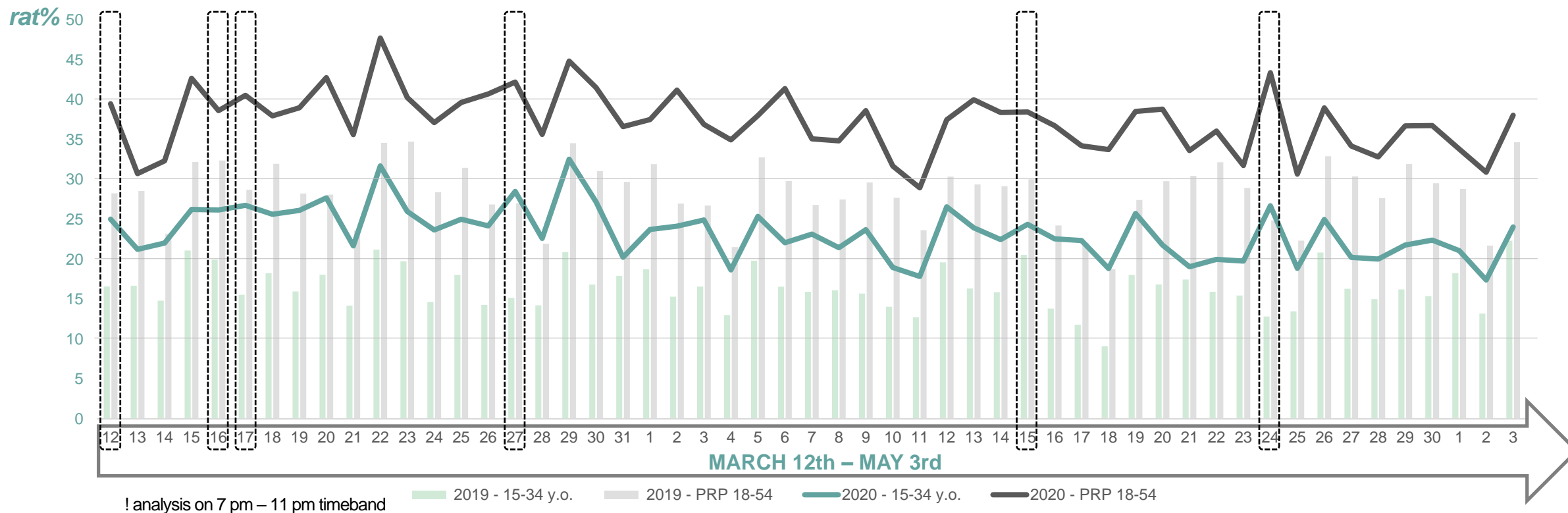


“LOCKDOWN AUDIENCES” WILL BE REMEMBERED

Young & old rediscovered the daily appointment with (linear) TV. To get informed in the early days of the lockdown, to “escape” and to be entertained when lockdown became the new normal



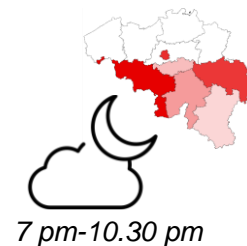
Sunday still strong, but less competition with a recap episode of *De Mol* (VIER) and *Boer Zoekt Vrouw* (VTM), without the success (yet) of *Blind Getrouwd* (VTM) in the previous weeks. *Liefde voor Muziek* (VTM) is still strong as well in the top 5 programs of week 18 with both younger and older audiences. On target 15-34 y.o. *Temptation Island* is growing stronger by the week. On PRP18-54 y.o. *Columbus* (EEN) had a strong start on Thursday.





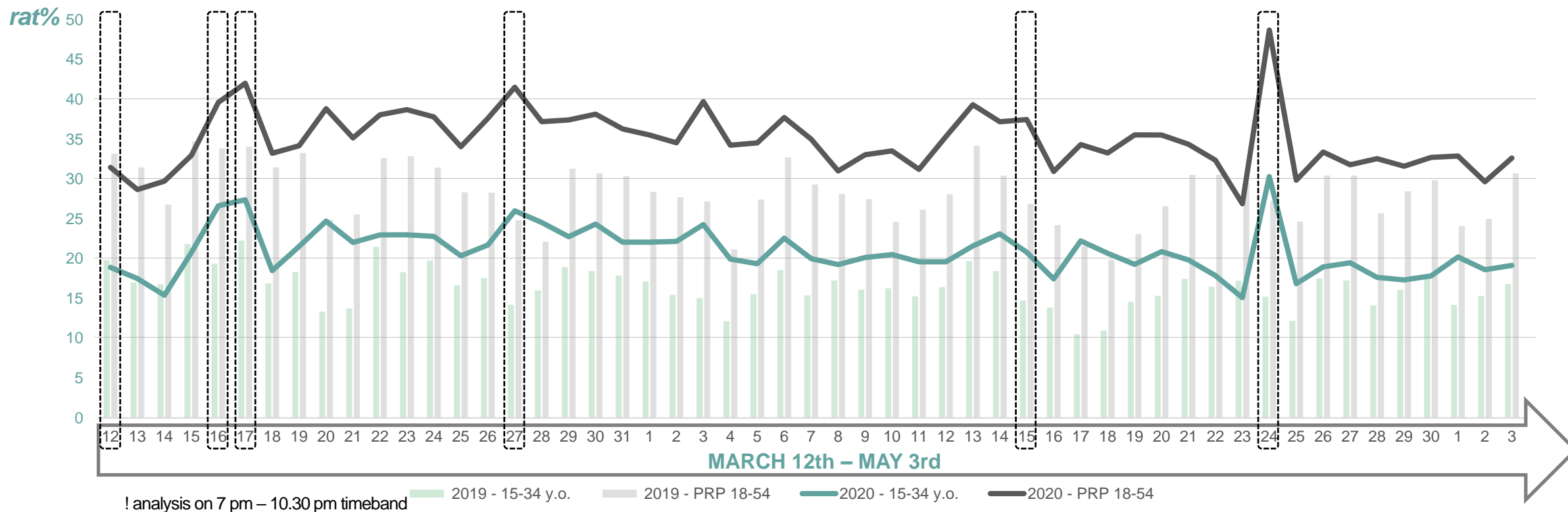
SLOWLY BACK TO NORMAL

RTL undoubtedly “KING OF THE SOUTH” and leader in news coverage.
Audience rates returned to seasonal averages (due to bad weather?)



7 pm-10.30 pm

Thanks to its daily news program *RTL Info 19h* and to the related programs on coping with lockdown, such as *Belges à domicile*, RTL holds a firm grip on all of the Top 10 programs. Only *Koh-Lanta* (TF1) was able to claim a 3rd place this week on the younger target group 15-34 y.o. The program suffered heavily from the government announcement on Friday April 24th, but had a good recovery last Friday gaining back 50% of its lost audience within the younger target group 15-34 y.o.



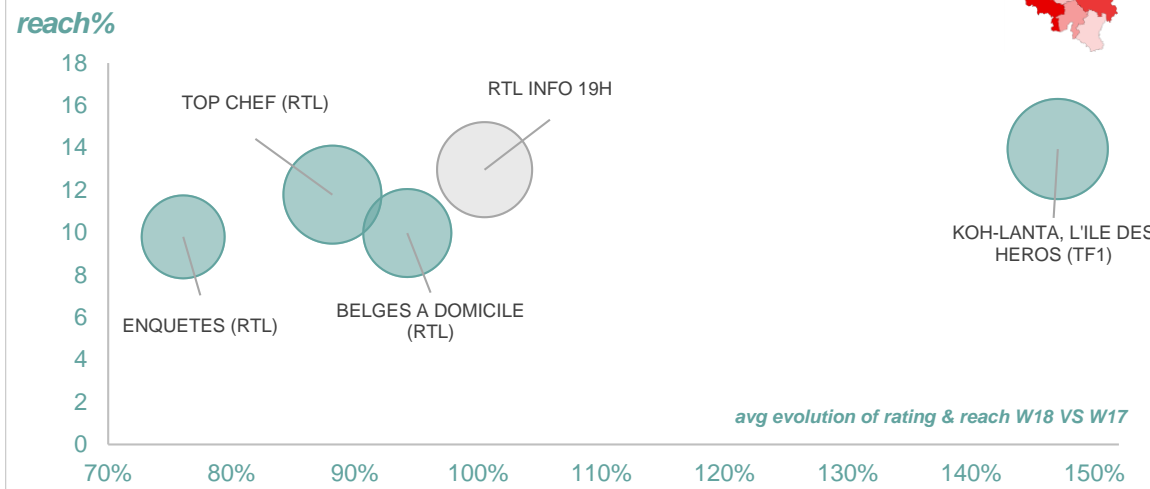
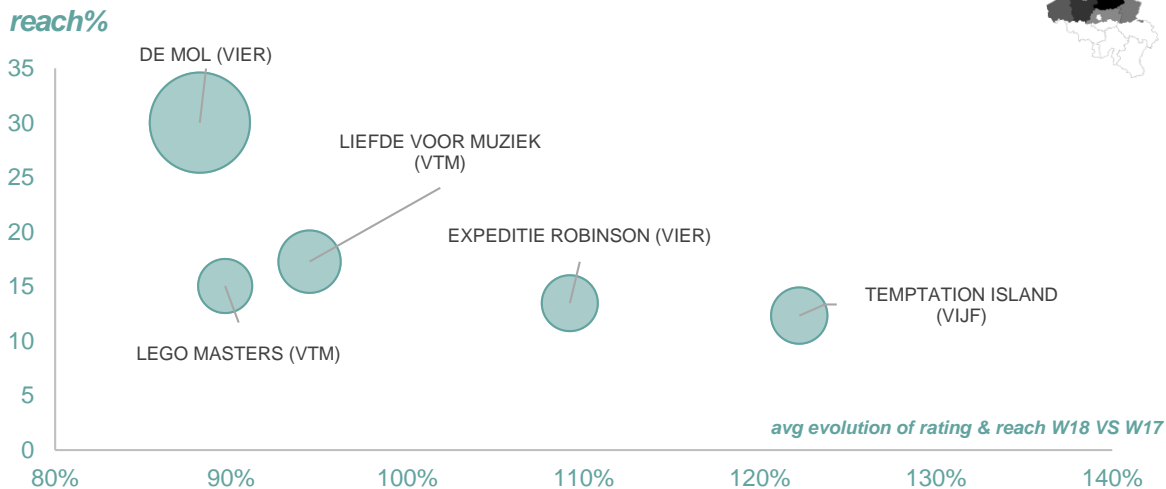


YOUNG ADULTS WANT TO ESCAPE... ON AN ISLAND

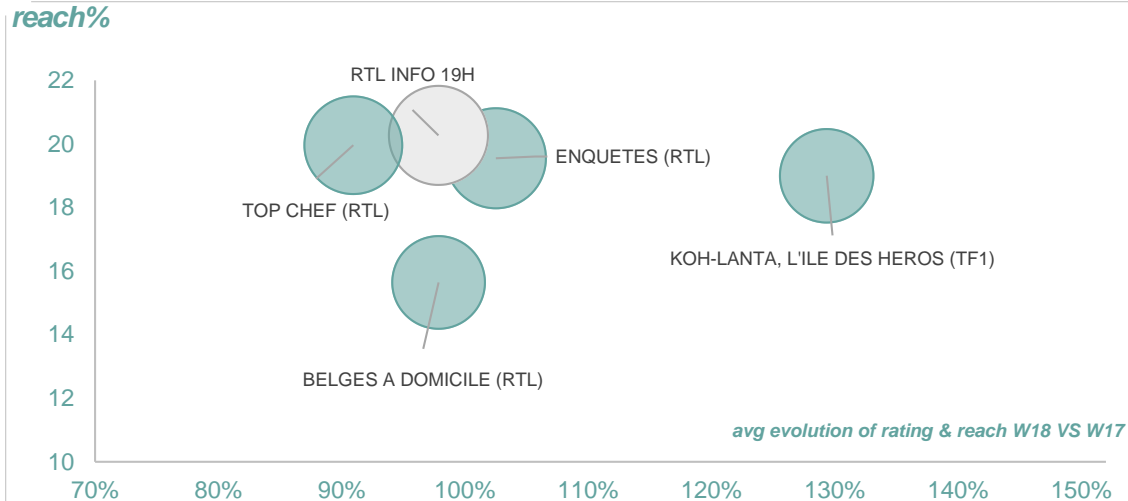
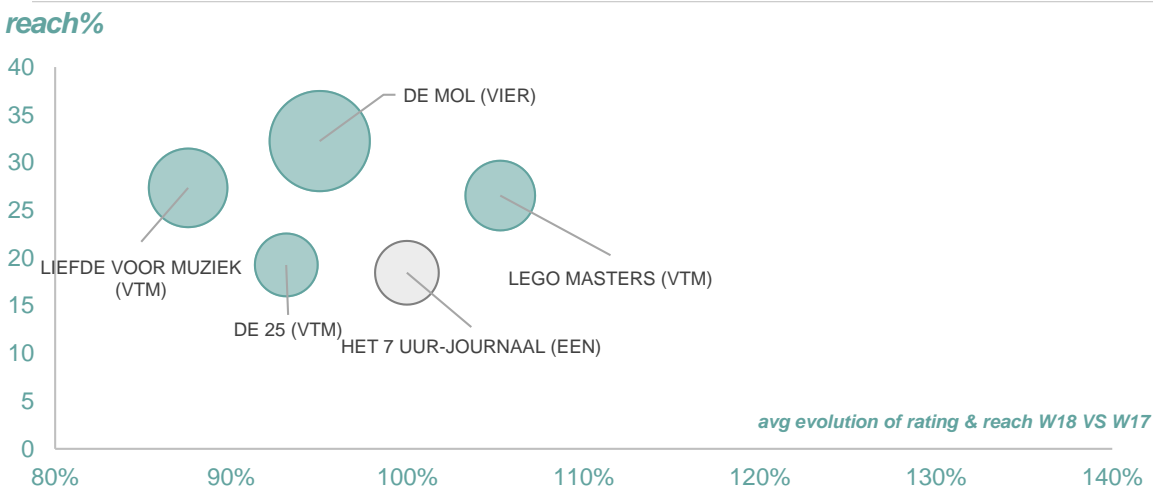
Belgians are into programs where people can shift their boundaries

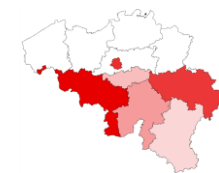
(Koh-Lanta, Top Chef, Lego Masters, Expeditie Robinson)

**TARGET
15-34**



**TARGET
PRP 18-54**

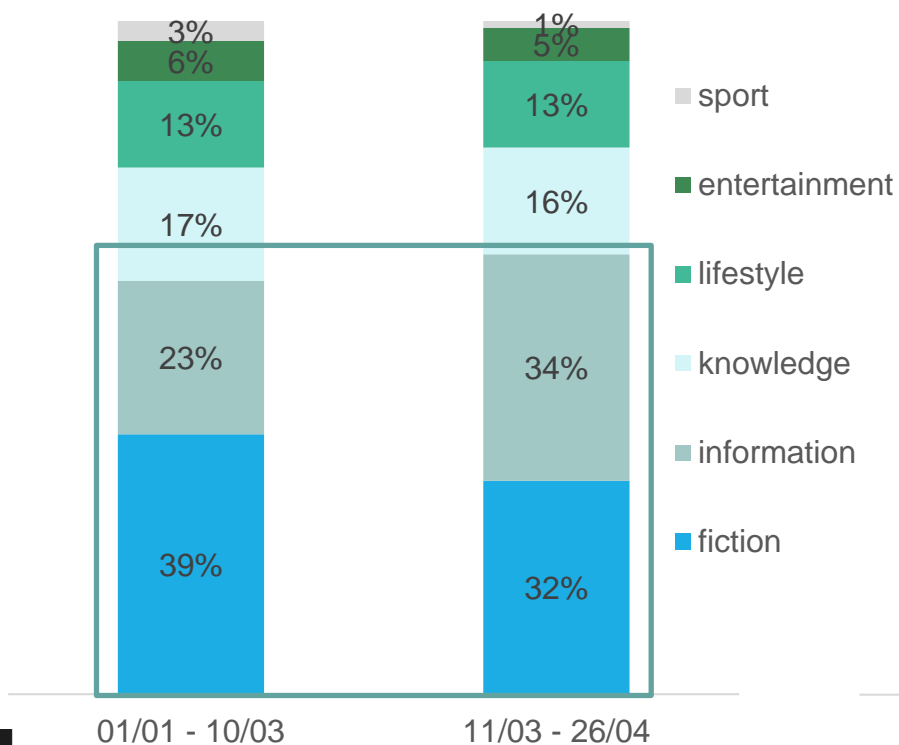




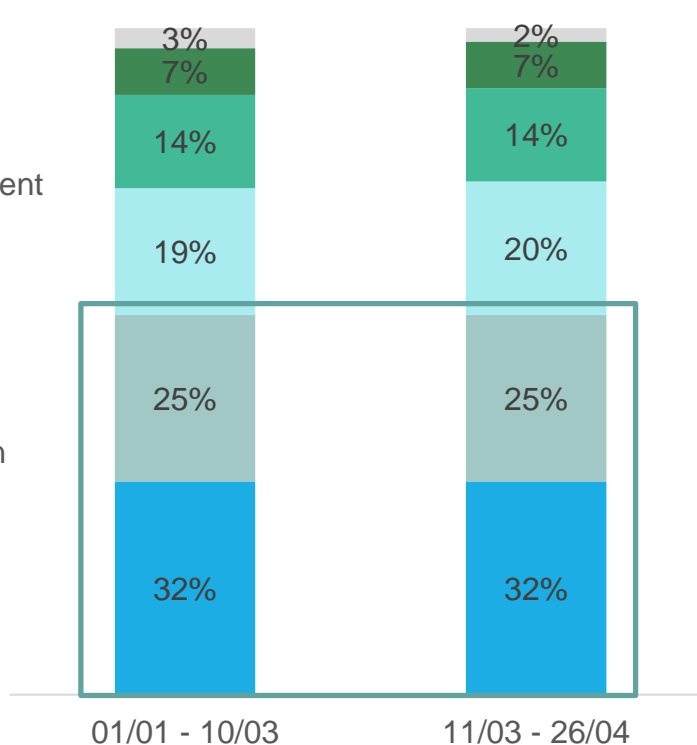
SIMILAR CONTENT OFFER, MORE NEWS CONSUMPTION

RMB analyzed the content offer VS the content consumption on the main French-speaking TV channels in Belgium during lockdown. News displaced fiction

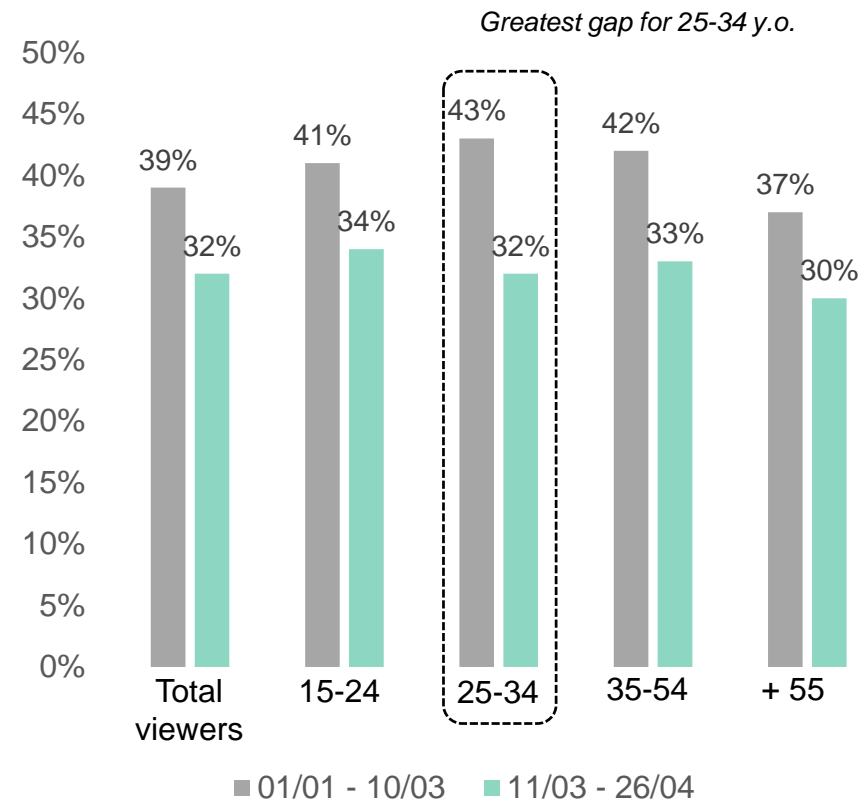
Content consumption (ATV)



Content offer (program duration)



Fiction consumption (% volume based on ATV)





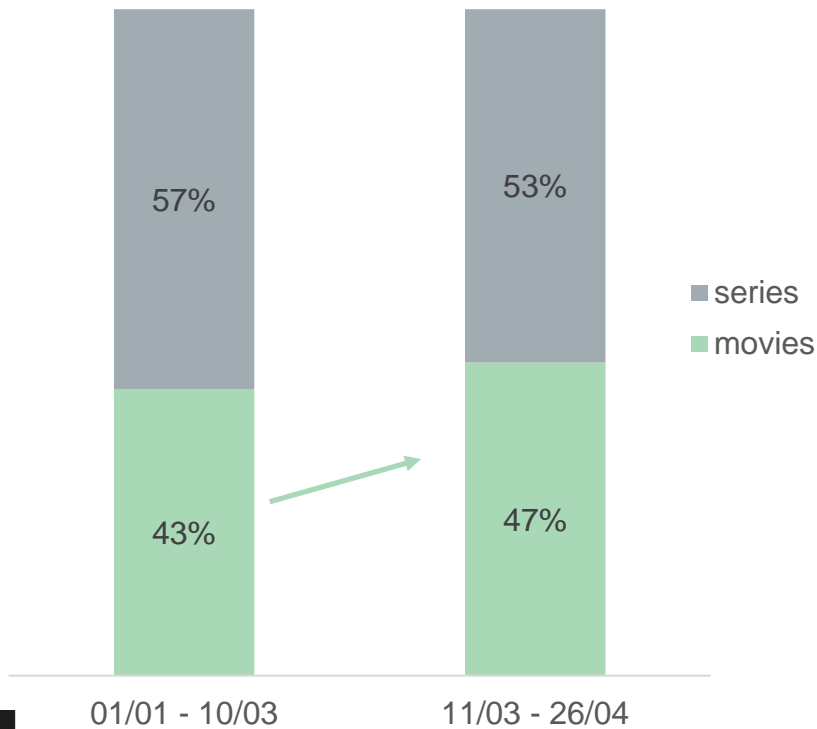
“LONG FORMAT” FICTIONS MORE POPULAR DURING LOCKDOWN

Popular & action movies accounted for 58% of the movie consumption in the South

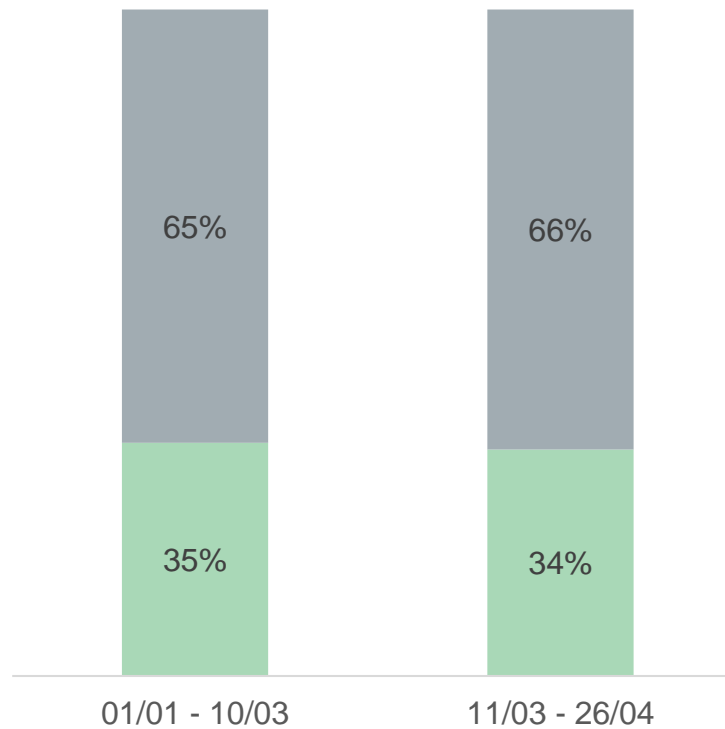


NB : During lockdown, **thrillers** were less popular. The audience favored comedies & action movies

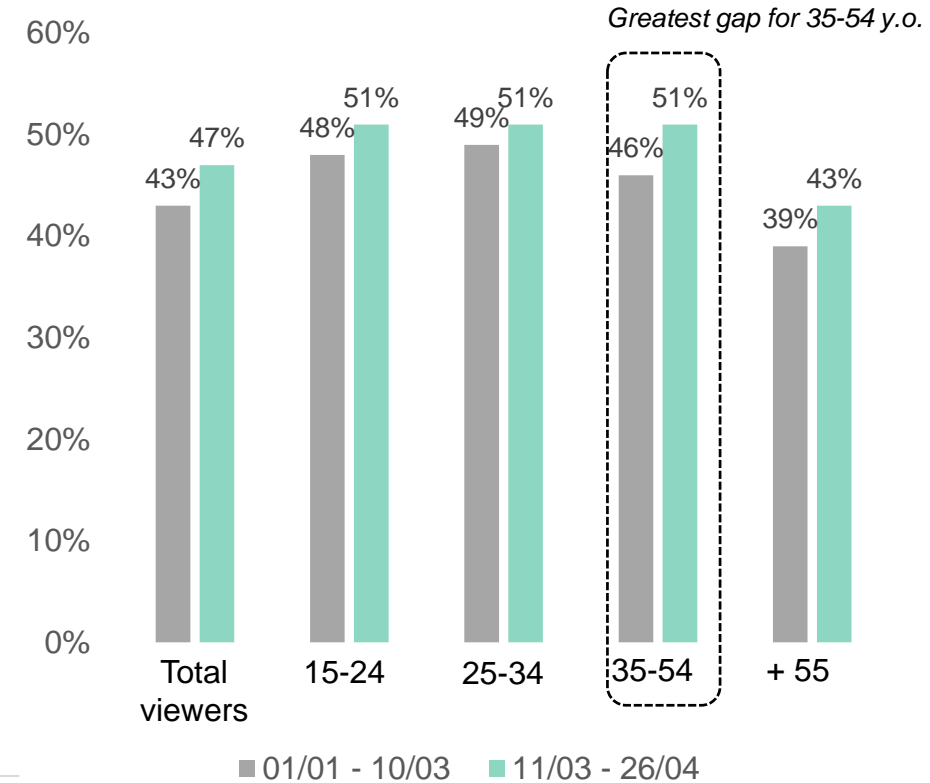
Fiction consumption (ATV)



Fiction offer (program duration)



Movies consumption (% volume based on ATV)





FANCY A MASK?

Source: <https://dnyuz.com/2020/03/17/fashion-and-masks-in-the-age-of-coronavirus/>



MASKS ARE NOW (ALMOST) MANDATORY IN PUBLIC

Sales of masks started in retail on May 5th. Wearing masks mandatory in public transports as from May 4th...

It became mandatory on the 4th of May to wear a face mask in public transportations.

VOYAGEZ EN TOUTE SÉCURITÉ

LE MASQUE EST OBLIGATOIRE GARDEZ VOS DISTANCES RESPECTEZ LES RÈGLES D'HYGIÈNE ÉVITEZ LES HEURES DE POINTE

#MoveSafe
Ensemble, pour voyager en toute sécurité.
snrb.be

Masque obligatoire Gardez 1,5 m de distance Achetez votre ticket en ligne via notre app ou sur snrb.be



Starting from the 5th of May, supermarkets can sell masks to the consumers.

Vous êtes, de loin, le meilleur des clients.

AAN DE KASSA BESCHERMT DE PLEXI WAND JOU EN DE LIDL-MEDEWE

Continuons à maintenir une distance de sécurité d'1m50.
Et on pourra à nouveau rapidement se retrouver pour faire du sport ensemble



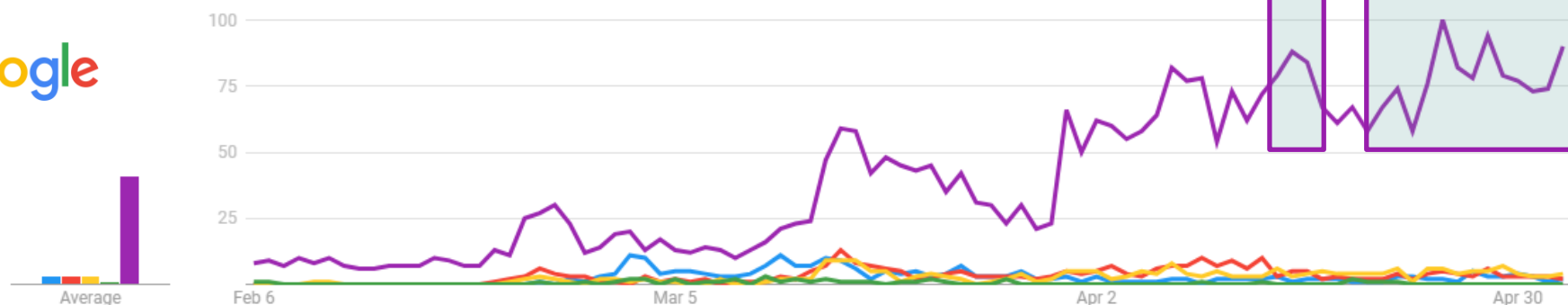
PROTECTIONS ARE IN EVERYONE'S MIND

Search volume is huge!



Interest **Google Search** over time (topics) for:

Hand sanitizer Topic Respirator Topic Surgical mask Topic Hand washing Topic Mask Topic



- Peak on April 15th

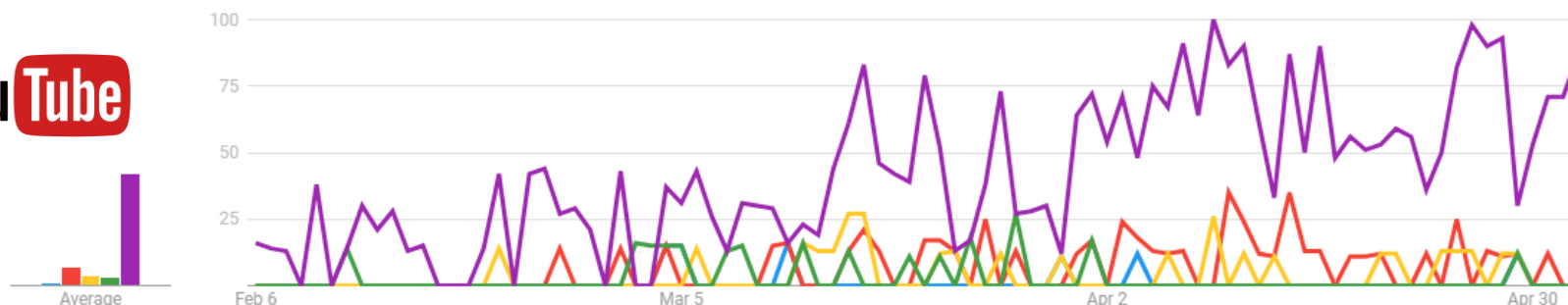
Belgian government announces that **lockdown measures will continue**

- Peak on April 25th

Day after the Belgian government announced that **the exit strategy will start on the 4th of May**

Interest **YouTube Search** over time (topics) for:

Hand sanitizer Topic Respirator Topic Surgical mask Topic Hand washing Topic Mask Topic



In addition of searching online, people are also looking on YouTube in order to find useful information:

- Hand sanitizer fabrication
 - Mask DIY
- Respirator for the health sector

Source: [Google trends search volume in Belgium](#)

Interest for **Hand Sanitizer**, **Respirator**, **Surgical mask**, **Hand washing** and **Mask** (subject). From 06/02/2020 till 06/05/2020



FROM CATWALK TO “STREET” WEAR

Face masks are not new... in the fashion industry. When masks were mainly designed by high fashion houses, it could become an essential item of our wardrobe

AITOR THROUP



GIVENCHY



STEPHEN JONES



PETER PHILIPS



M.M.M

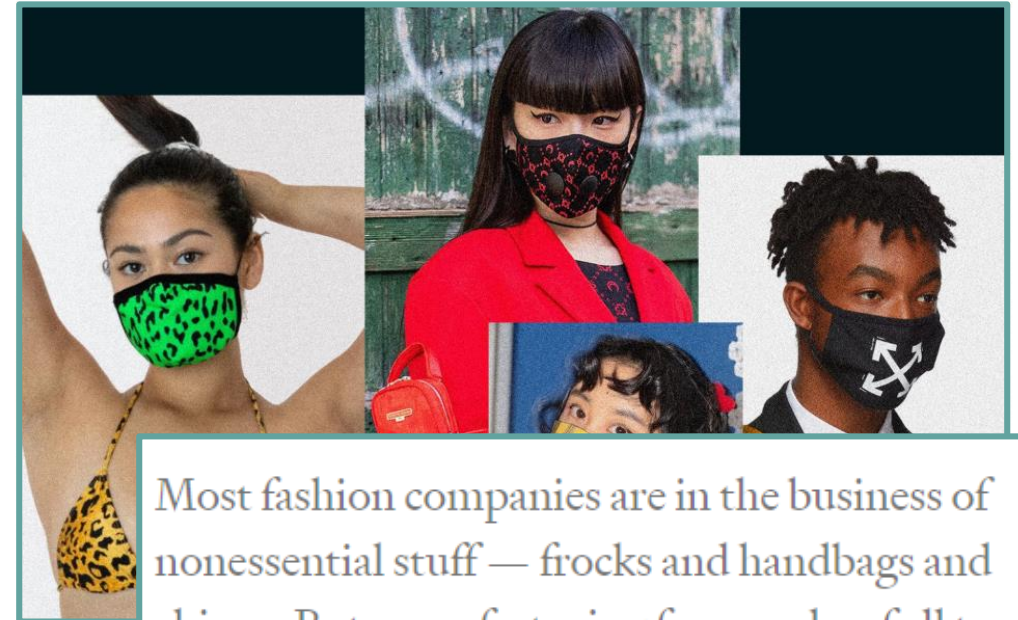


MARINE SERRE



The Real Reason Every Fashion Company Is Now Making Face Masks

There's a business case for why Gap, Zara, Louis Vuitton, Dior, and Chanel are all racing to crank out masks



Most fashion companies are in the business of nonessential stuff — frocks and handbags and chinos. But manufacturing face masks of all types are more likely to be viewed as essential businesses.



BRANDED MASKS BECOME A THING

Now that we're slowly getting back to normal, consumers must be ready for the exit

#DIYMASKATTACK

Masque tissu - Solidarité Coronavirus - Belgique
@diymaskattack

Groupement de citoyens ayant pour objectif de permettre l'échange de masque en tissu fait main
Consolidation des sources d'informations - tuto - don de tissu

#DIYMASKATTACK

Like Follow Share ... Send Message

The Belgian population is creating groups to help connect people making masks and potential buyers through a *solidary network*.

Colruyt, Delhaize, Carrefour : les masques arrivent dans nos supermarchés
"au prix le plus bas du marché"

Mondmaskers vanaf dinsdag te koop in supermarkten: prijs onder 1 euro

Redactie | 03 mei 2020 | 15u02 | Bron: VTM NIEUWS

DEEL 0548 TIO REACTIES

Carrefour is selling face masks in their shops.

Les Maisons Natan et Degand

Habitués à coudre des robes et des costumes, les Maisons Natan et Degand, qui ne peuvent actuellement plus travailler, se sont mises à la couture de masques FFP2 depuis quelques jours dans leurs ateliers situés sur l'Avenue Louise. Pour l'instant, ils en créent environ 500 par jour, grâce à quelques employés venus travailler volontairement. Les masques sont ensuite distribués aux policiers, au personnel des maisons de repos, aux travailleurs de la voirie, aux gardiens de la paix de la ville, mais aussi aux hôpitaux de Bruxelles et d'Ixelles, la ville natale d'Edouard Vermeulen.

PLUMKA

La maison belge qui produit généralement des courtes et des oreillers, depuis 1925, dans son atelier à Linkebeek a été mise à l'arrêt. Elle s'est mise aussi à la fabrication de masques destinés au personnel soignant. Ils sont fabriqués en polyester et en coton, ils sont donc destinés aux personnes qui doivent continuer à prodiguer des soins à leurs patients, comme les kinés et les infirmiers, mais pas au personnel médical qui est en contact avec des personnes susceptibles d'être infectées. En effet, ces masques constituent une barrière, mais pas une protection optimale.

RectoVerso

La marque belge de vêtements sportwear RectoVerso, s'est elle aussi reconvertie dans la production de masques pour soutenir le corps médical et hospitalier. Alors que la nouvelle collection de la marque a dû être mise sur pause, Liebert Textiles de Delcove, le spécialiste des tissus, va fabriquer 10.000 masques. Ils seront tous conçus sur trois couches de tissus différents : un tissu waterproof qui constituera la couche extérieure, un tissu extrêmement dense pour filtrer le plus de particules possible, un tissu doux anti-microbien et antibactérien. Les masques RectoVerso sont lavables en machine ce qui permet d'être réutilisables.

Belgian fashion houses create masks.

The Lego produced masks for the health sector

lego 5.6 m abonnés Voir le profil

Disney cloth face masks
Disney

Disney sells face masks of their characters

Disney's Cloth Face Masks

Disney is committed to serving the communities where we live and work. During these challenging times, we're using the power of our timeless stories and beloved characters to address our guests' needs for family-friendly reusable cloth face masks.

Disney is donating one million cloth face masks for children and families in underserved and vulnerable communities across the U.S. that will be distributed by MedShare (www.medshare.org). Due to overwhelming demand, we're thrilled to share that we have reached our goal of raising \$1 million in profits from the sales of our cloth face masks, which will be donated to MedShare to support the medical community's ongoing efforts to provide lifesaving care to those in need.



BRAND OPTIMISM

Building a makeshift cardboard car to be able to get a drive-thru burger... Belgium, homeland of surrealism! We put this case in our #Brandoptimism section as an example of the attachment between brands and consumers.

It also features how Havas Brussels decided to mix preventive messages about the crisis with hopeful perspectives with existing creative material from their clients.

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

HAVAS BRAND OPTIMISM

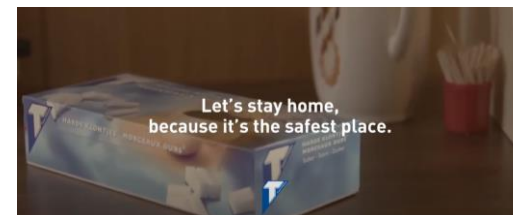
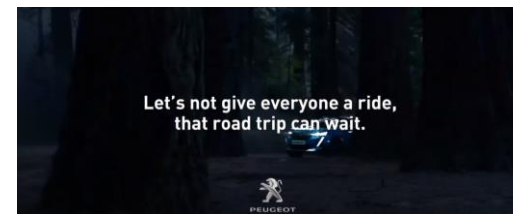
WE STAND BEHIND OUR BRANDS

In this together to do better together

HAVAS BRUSSELS cheering up everyone's mood.

With the first phase of the Exit Strategy, it is more necessary than ever to prevent the virus from gaining ground. Havas Brussels decided to mix preventive messages about the crisis with hopeful perspectives.

The [video](#) re-used sequences of advertisements made for some clients and added simple advices to the mix. As an invitation to continue the efforts undertaken to wipe out the virus.



HAVAS
BRAND
OPTIMISM

HOME GAMES 2020 BY ORANGE

A whole in-home Olympic experience!

Orange launched a competition with 5 sport related challenges created by Belgian athletes.

Everyone can participate in order to win the prize (iPhone11). The challenges don't require specific material. People can use whatever they have at home.

Quarantined alone, with your loved one, in a colocation or with family, it didn't matter to be able to compete in this competition.

#ResteEnFormeChezToi et #ResteChezToiATaFaçon



BRANDS

Orange olympique avec Publicis Groupe et Boson

Dimanche 3 Mai 2020



Home Games 2020

Maison
Les soirées entre amis. Voir gagner son équipe favorite. Manger des tartes chez les grands-parents. Les rendez-vous après l'école. Faire du sport. Des choses parmi tant d'autres que nous ne pouvons plus faire à cause du coronavirus.
Rester à la maison est la meilleure des choses à faire, mais ce n'est pas toujours la plus facile. Occuper les enfants, télétravailler, la solitude, l'ennui... pas toujours facile à gérer. Voilà pourquoi, nous nous sommes donnés pour mission de vous aider à continuer de faire ce que vous aimez, même confinés chez vous.

Maison
Les Jeux de Tokyo 2020 sont annulés. Mais cela ne nous empêche pas d'organiser nos propres jeux à la maison : place aux Home Games ! Seul, en couple, entre colocos ou en famille c'est l'occasion de vous amuser et de peut-être gagner un iPhone 11 ! Alors qu'est-ce que vous attendez ?

31.03.2020 Par Simon V
30.04.2020 Par Simon V

#ResteChezToiATaFaçon

Tous les détails ici

Home Games 2020



BRAND OPTIMISM

FABRIC SHOPS GETTING BACK TO BUSINESS

People were ready for the re-openings of the shops

The Belgian Government has decided to open on May 4th the fabric shops in order to facilitate the creation of preventive masks.

The population reacted immediately. Materials to create masks were the most wanted. People were really waiting for the re-opening of these shops.

Note: it is really important to foreseen which products will be in your consumer's mind in order to prepare the relevant amount of stocks.



veritas

Une heure de file devant Les tissus du chien vert

Les merceries peuvent rouvrir depuis ce lundi, et elles sont prises d'assaut, comme le rapporte notre journaliste Nicolas Keszei, qui s'est rendu aux Tissus du chien vert à Molenbeek, et chez Veritas à Etterbeek. Les files sont longues et certains articles, comme les élastiques, viennent à manquer.



FABRIQUEZ VOTRE PROPRE
MASQUE BUCCAL

AU TRAVAIL !



BRAND OPTIMISM

OOH SOLUTIONS TO COMFORT & CONNECT PEOPLE

STIB/MIVB shares people's message to their loved ones

Brussels transportation company STIB/MIVB is connecting people together in a touching way.

The company broadcasts messages to friends and family all over the city via a branded bus.

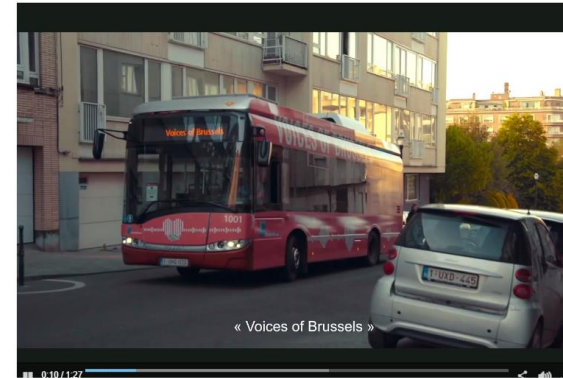
People can record their message either via a voicemail or a type message via Messenger. The bus goes from places to places in Brussels every evening to share these messages to those they are intended for.



THIS BUS IS BROADCASTING PERSONAL MESSAGES AROUND BRUSSELS DURING THE PANDEMIC

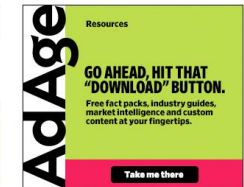
Belgian transport company STIB/MIVB is playing its part in connecting people

By Alexandra Jardine Published On Apr 30, 2020






Editor's Pick

Belgium is now preparing to relax the lockdown that has been ongoing there for over a month, but during the isolation period, Brussels transportation company STIB/MIVB has been playing its part in connecting people. In a campaign via agency Mortierbrigade, the company is broadcasting messages to friends and family all over the city via a special bus.



Most Popular

-  Coke bottles stand for family and friends in brand's latest pandemic ad
-  Burger King salutes nurses (and couch potatoes) in its 'Stay Home of the Whopper' campaign
-  Creativity lives on in Apple's coronavirus ad



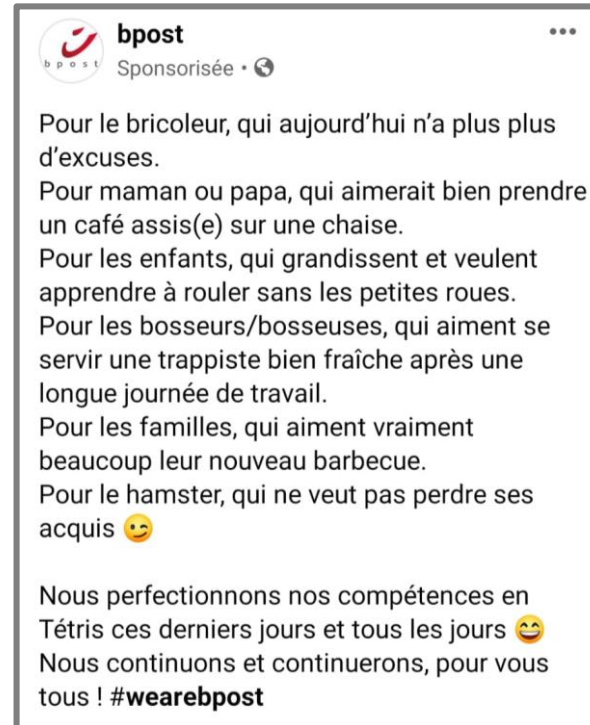
CHASING THE GLOOM AWAY WITH HUMOR

Brands make us smile to show they are with us

BPOST meets the challenges.



Due to lockdown, the number of delivery packages has drastically increased. In fact, bpost had to handle 2 mio packages more than foreseen. The company handles more than 500.000 packages a day.



RE-OPENING DRIVE SERVICES INSPIRE PEOPLE

No car ? It's not a problem

The crave for burger is stronger than the lockdown.

A mother-daughter duo in Belgium captured widespread attention after building a makeshift cardboard car to be able to get a McDonald's drive-thru meal despite the coronavirus lockdown. Not owning a car, the pair opted to build their own... Making the employees of McDonald's smile and laugh!

They are regular clients of the fast-food located some 500m from their home,



THE END

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06/05/20

Brussels