

# COVID-19 LIVING IN THE NEW NORMAL

## WEEK 6

22/04/20

Brussels

# HAVAS TALKS



*J'ai toujours été curieuse de nature. Mon grand rêve était de devenir journaliste, en presse écrite! Si ma route a dévié, j'aime à penser que j'applique toujours les bases dans mon métier actuel: contrôle et recoupement des sources, rédaction à l'adresse d'une cible spécifique, publication et présentation du résultat.*

*Le résultat vous le retrouvez ici. Alors non, je n'ai pas parlé des heures de réunions (merci Teams!), des analyses TV et web revues et contrôlées au moins 3x, des textes réécrits et remis en forme 4x, et j'en passe. Chaque semaine, Alix, Flore, Maxime et moi-même, le comité rédactionnel, repensons la formule. C'est parfois éreintant, c'est toujours intéressant. Et j'ose: le résultat est éblouissant.*

*Nous ne sommes pas médecins, nous ne sommes pas caissières ou réassortisseurs. Nous ne sommes pas graphistes, nous ne sommes pas journalistes. Nous sommes des pubeurs. Nous sommes des curieux. Nous aimons nous montrer généreux.*

*C'est pourquoi depuis 6 semaines, nous partageons avec nos collègues, nos partenaires, nos concullègues le fruit de nos réflexions et de notre métier. Avec nos ressources, nos outils, nos études.*

*Je suis donc tout particulièrement heureuse de partager avec vous les premiers insights de l'étude sur les sentiments et les habitudes des Belges pendant cette crise, réalisée pour nourrir l'OBSERVATOIRE H/COMMERCE. D'autres suivront la prochaine!*

*J'espère que le résultat de notre expertise média couplée aux insights RETAIL de cette étude vous passionnera autant que moi! N'hésitez pas à nous contacter pour en savoir plus.*

*Bonne lecture,*

**Vanessa Sanctorum, Strategy Director – Havas Media Belgium**



# HAVAS TALKS



*Chers tous,*

*h/commerce l'offre de consulting globale du groupe havas dédié à toutes les formes de commerce a lancé en Belgique une étude sur les changements et les attentes des citoyens en matière de consommation et vis-à-vis de leurs enseignes ceci en plein confinement.*

*Une occasion, nous l'espérons unique dans l'histoire, pour tenter de comprendre comment les Belges vivent leur confinement, comment leurs rapport à la consommation évolue, quels nouvelles relations ils construisent avec la distribution, alimentaire et spécialisée, quelles nouvelles formes de commerces émergent, qu'attendent t'ils aussi du déconfinement.*

*L'étude révèle que la consommation se recentre sur l'essentiel. 80% des sondés déclarant ne faire que des achats utiles, Cette étude fait également ressortir l'émergence des commerces de proximité, et la nouvelle dynamique des marques propres 36% des sondés se reportant sur les marques distributeurs. Enfin, l'éclosion de l'e-commerce est forte, particulièrement chez les plus jeunes avec plus de 55% des 18-34 ans déclarant faire plus d'achats online qu'auparavant.*

*Les consommateurs valident en masse l'effort des distributeurs pour répondre à leurs attentes de consommation. Ils sont plus de 80% à être également satisfaits de leur communication.*

*Mais les angoisses des Belges liées à la peur de la contamination sur les lieux de distribution ressortent également dans l'étude. Même s'ils ont perçu les efforts substantiels consentis par les enseignes, dont ils sont 83% à reconnaître la bonne application des règles de sécurité, la peur reste très forte. 63% des belges déclarant ne pas se sentir en sécurité en magasin.*

*Il y aura un après crise, mais les belges sont pragmatistes et loin d'être idéalistes. Ils appréhendent une dégradation de leur situation, anticipent des dépenses plus modestes (à 58%) et leur principale aspiration est sociale et familiale avec un recentrage anticipé sur une consommation plus ancrée localement.*

*La réalité dépend bien sur de la durée du confinement, des conditions du déconfinement et de la reprise de l'offre économique bien avant la demande mais on peut d'ores et déjà anticiper que cette crise, d'une soudaineté, d'une violence et d'une profondeur inégalée va transformer pour longtemps les comportements citoyens et de consommation*

*Bonne lecture*



# EXPERTS OPINIONS



## “ Think MarkComm local

*It is necessary to continue to urge not to waste talent. That's why we should try to help local businesses as well as possible. Self-employed people undoubtedly need advice or creative ideas to be able to restart their activities as soon as possible after the crisis..*



Isabel Van den Broeck, Managing Director (Creative Belgium) – MM



## “ Connect

*(Companies) They have unlearned to exist in a changing environment and cling to their achievements. That's why they don't dare to communicate anymore. That's why they cannot stay present and connected in the hearts of people.*



Salma Haouach, TV Host, Strategic communications & Economic Editorialist (LeLabTV, LN24) - PUB



## “ Media adaptability

*We discovered our creative talent and launched many content ideas that challenge a whole range of certainties and pave the way for innovations. In addition to new ideas for podcasts and new interactions with listeners, we see that it is not really essential to be in the studio to do radio.*



An Caers, Radio Director (DPG Media) – MM

# CONTENT

## CONTEXT

1

**FROM LOCKDOWN TO STEP-BY-STEP CONFINEMENT:**  
a review

## H/COMMERCE

2

**BELGIAN CONSUMER SENTIMENT:**  
behavior & buying attitudes during Covid-19  
with a focus on supermarket & food retail

## MEDIA

3

**EXPECTATIONS & USAGE:**  
what do Belgians expect from media regarding  
content, regarding the current crisis?

## WEB & SOCIAL

4

**HYPERLOCAL & DEDICATED**  
Local news still rules! But don't neglect  
thematic media brands online

## TV

5

**ESCAPISM & ROMANCE**  
in both language communities, people are  
looking for escape, challenge and... LOVE

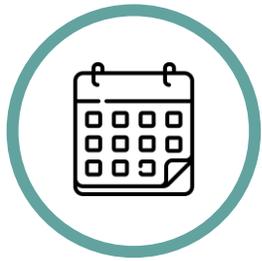
## RADIO

5

**ALIVE & KICKING**  
radio listeners are attached to "classical" radio  
stations... and new ways of listening to audio



**FROM LOCKDOWN TO  
STEP-BY-STEP DECONFINEMENT**



# COVID-19 TIMELINE IN BELGIUM

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?



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



Phase 2

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

Regional measures

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

Belgium hands powers to caretaker government

Coronavirus pandemic sparks new debate on the ongoing federal government formation

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

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

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

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

10 federal actions to help businesses

Coronavirus : la Belgique entre en "phase 2 renforcée"



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

Prohibited groupings

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



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

Phase 2 re-enforced in BE  
Belgian government orders the closure of schools, horeca (except for delivery) & the cancellation of public gatherings

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



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

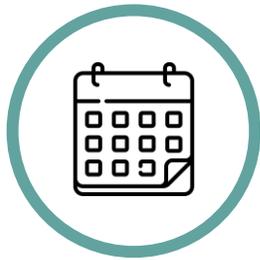
Prime Minister imposes stricter social distancing through total lockdown measures from noon the following day

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

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

Pas de renforcement mais une prolongation du confinement en Belgique





# NEXT STEPS TOWARDS DECONFINEMENT

## PRIVATE

Small gatherings with friends and family could be authorized during the weekends (max 10 people). Parks and playgrounds could be allowed as well as some sports with no physical interactions.

Monday,  
May 1<sup>st</sup>

## ECONOMY

Some businesses will re-open: construction, commerce, transportation (not airlines), technical support and administrative. Homeworking is still preferred.

## PRIVATE

Schools could re-open, starting with primary schools. Small classes with part-time school is considered. In secondary school, last year students will start first.

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

## ECONOMY

Homeworking is still preferred. Restaurants and coffee places would still be closed.

Vers un déconfinement en trois tranches, les écoles rouvriraient le 18 mai



Le déconfinement commence à se dessiner. Vendredi, le Conseil de sécurité se réunit autour de Sophie Wilmès, la Première ministre, et prendra quelques décisions. @Photo News

SOPHIE LEROY Aujourd'hui à 07:06

Le 4 mai, seuls quelques secteurs reprendraient leurs activités (presque) comme avant. Les écoles rouvriraient à partir du 18 mai, mais de façon très progressive et avec des mesures strictes. Voici le déconfinement tel qu'envisagé par le groupe d'experts mandatés par le gouvernement.

Date:  
Not  
known  
yet

## ECONOMY

HORECA would re-open as well as culture and animal parks. It is asked to professionals of these sectors to find ideas for putting social distancing in practice.

Sport competitions and youth movements also need to find alternatives/solutions.



# BELGIAN CONSUMER SENTIMENT

purchase behavior & buying attitudes during Covid-19

# METHODOLOGY & SAMPLING

questionnaire



panel provider



methodology



field



Fri April 10th –  
Wed April 15th

sample



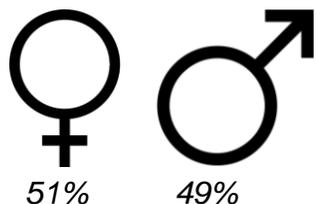
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avg duration

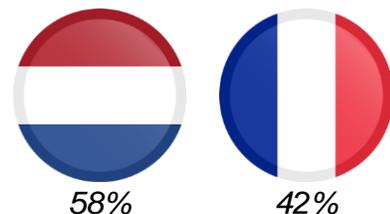


13m13s

## Gender



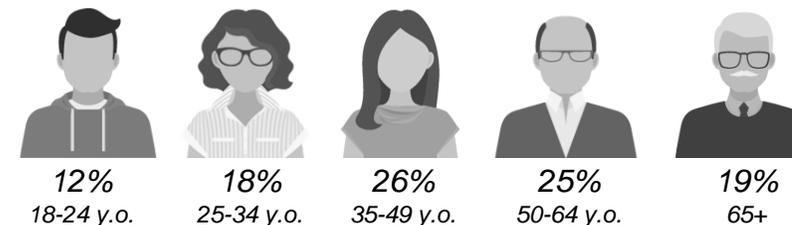
## Language



## Prof. active



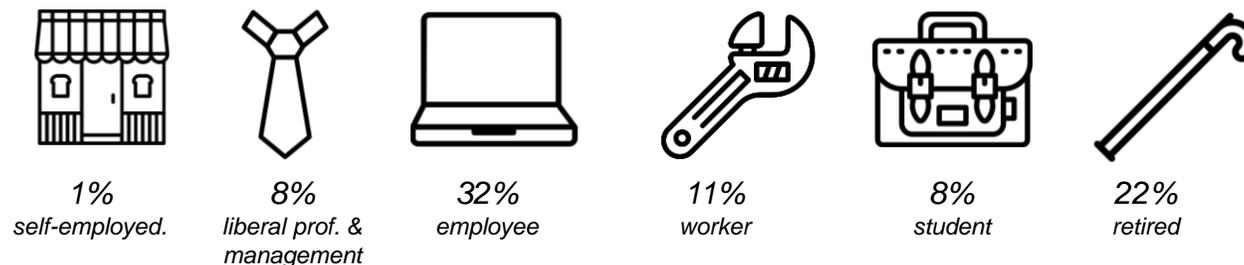
## Age



## Region



## Professional situation



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

1



**67%** surfing on the internet

2



**55%** cleaning/tidying the house

3



**55%** watching TV w/family

4



**52%** cooking

5



**44%** watching videos & movies

# SPRING IS IN THE AIR!



Delhaize Belgium

26 137 abonnés

15 h • (21/04/2020)

✓ Suivi ...

The coronacrisis has changed Belgians' consumer behavior drastically. We made a small recap after one month of quarantine and noticed 4 main trends. First Belgians started showing a higher hoarding behavior and started buying more non-perishable products. After that phase, people went on a cooking spree. They started buying more products to cook healthy meals themselves. The most recent observation is that Belgians are taking more care of their well-being but spend less time on their looks. And finally, people are not only taking care of themselves but also of their homes. Cleaning is now more than ever on the agenda.

[#togetheragainstcoronavirus](#)

[Voir la traduction](#)



## SPRING CLEANING ON THE AGENDA

1 **55%** of respondents mentioned cleaning as their main activity last week

## WOMEN'S DEVOTIONAL SPRING CLEANING

2 **64%** of women has cleaned the house last week. Did men help with the household chores? 45% mention this activity as a major activity

## AND THE WINNER IS... DETTOL

3 **+302%** DETTOL saw its sales tripled in last 5 weeks (15/04/2020 in [Retail Detail](#))

nielsen

What have been your main activities during the past few days?

**Geen overrompeling in Limburgse tuincentra en doe-het-zelfzaken: “Dit bewijst dat er meer zaken kunnen opengaan”**

19/04/2020 om 20:29 door Jan Bex



**Ouverture des jardineries et magasins de bricolage: Comeos, la fédération belge du commerce et des services, lance un appel à la sécurité**

Les magasins de bricolage et les jardineries peuvent ouvrir leurs portes dès samedi. Comeos, la fédération belge du commerce et des services, lance un appel aux clients : « respectons au maximum les mesures de sécurité ».



Since Saturday April 18th, improvement shops and garden centers were allowed to reopen by the National Security Council to the delight of all the gardening aficionados: as a matter of fact, 19% of Belgians had delayed the purchase of gardening products due to the confinement

# TIME TO MAKE THE GARDEN SUMMER PROOF

## GARDENING AS A MAJOR ACTIVITY

**1 41%** of respondents mentioned gardening as their main activity last week. (1 out of 2 within Baby boomers).

## e-GARDENING ON THE RISE

**2 10%** of respondents have visited NEW gardening & DIY e-commerce sites. Specialized stores must ensure their presence online.

## CONTENT IS EXPECTED

**3 21%** expect content from media about gardening & home improvement, esp. Walloon people.

# BUT NOTHING BEATS A HOME-COOKED MEAL



## COOKING AS A MAJOR ACTIVITY

**1 52%** of Belgians mentioned cooking. More women than men (62% vs 41%).

## BELGIANS DISCOVER e-GROCERY SHOPPING...

**2 19%** of Belgians have visited NEW e-commerce food & retail sites. 10% visited the site of a physical retailer they used to visit before the pandemic.

## AND ORGANIC FOOD ONLINE SERVICES

**3 9%** of Belgians have visited NEW online organic (food) sites. The interest for this type of suppliers is higher amongst 18-34 y.o. (19%).

1. What have been your main activities during the past few days? 2/3. Have you visited new e-commerce sites for

# CONFINEMENT SHAPES NEW EATING HABITS

## GEN Z EATS HEALTHIER THAN BEFORE

**1 63%** of respondents have not changed their eating habits. 19% are eating less healthy foods than usual, 18% more healthy. Within the younger age group 18-24 y.o., 40% claim to have switched to a more healthy diet.

## (more)than) ONE OUT OF FIVE DISCOVER NEW EATING TRENDS

**2 23%** think the situation is perfect to learn cooking mono-product dishes (based on pasta, rice...). Belgians are more interested in food products & services on social media as before the lockdown, the analysis of [SOPRISM](#) demonstrate:



## PLEASURE IN FOOD IS A BASIC NEED

**3 63%** of respondents claim they continue to purchase food products that make them happy. In the same way as before the lockdown. Especially older people of 65+ (72%) refuse to be denied the right to purchase food for "pleasure".

1. Do you feel like: you are eating more/less healthy or as usual? 2. Does this condition of confinement creates favourable conditions to purchase something specific or behave differently? 3. What are the purchases that you continue to make almost normally?

# LOCKDOWN SHAPES ALSO NEW BUYING HABITS

## ONLINE SHOPPING & DELIVERY SERVICES BOOMED

**1** **21%** of respondents used online shopping & delivery services a lot during confinement. Younger ones are the most heavy users with 37% of 18-34 y.o. having used these services more often the past few weeks.

### Après McDonalds, Quick et Burger King annoncent rouvrir leur drives-in

LE SOIR 20/04/2020

Après McDonalds, qui a annoncé lundi matin la réouverture de ses drives-in dès mardi, Burger King et Quick ont ainsi annoncé qu'ils en feraient de même à partir de jeudi.



### McDonald's reopens drive-thrus

vrtnws

Fast food outlet McDonald's is reopening its 'drives' starting as early as Tuesday following the coronavirus outbreak in Belgium. Fans of a Big Mac will be able to access McDonald's assortment of foods and beverages if they collect their order by car. Customers will only be able to enjoy a simplified menu though.

"We have taken the appropriate measures to allow us to welcome our staff in a safe environment and once again serve our customers" a spokesman said.

The company closed its 87 Belgian outlets including 'drives' as drive-thrus are called at McDonald's in Belgium on 18 March. 68 of the 87 Belgian McDonald's have drive-thru facilities. 'Drives' will be open from 11AM till 10PM.

## DRIVE SERVICES APPEAL (MORE) TO 18-34 y.o.

**2** **12%** of respondents used more drive service for grocery shopping, 21% within 18-34 y.o. Younger ones are the most heavy users with 14% of 18-34 y.o. having used these services often.

And good news: Quick, McDonald's and Burger King announced and reopened their drive-thrus!  
With massive road congestions as a result...



1. On a scale from 1 to 10, to which extend have you used the following services during confinement? (1: not used often/a lot - 10: used often/lot; scores 7-10 grouped). 2. See 1 + How does this situation changed your buying behavior? You do/use more... (Yes)

# BELGIANS MISS PHYSICAL STORES... BUT NOT THEIR VISITORS

## WOMEN MISS RETAIL STORES

**1** **50%** of respondents miss visiting retail stores.  
Women more often states they miss (window) shopping (58%).

## SUPERMARKETS ARE DOING A GREAT JOB

**2** **63%** feel safe and in security while doing the grocery shopping.  
French-speaking people have more varied opinions: only 58% feel safe (vs 66% of Flemish-speaking people)

Coronavirus: 30% des clients de Delhaize ne respectent pas les règles de distanciation sociale

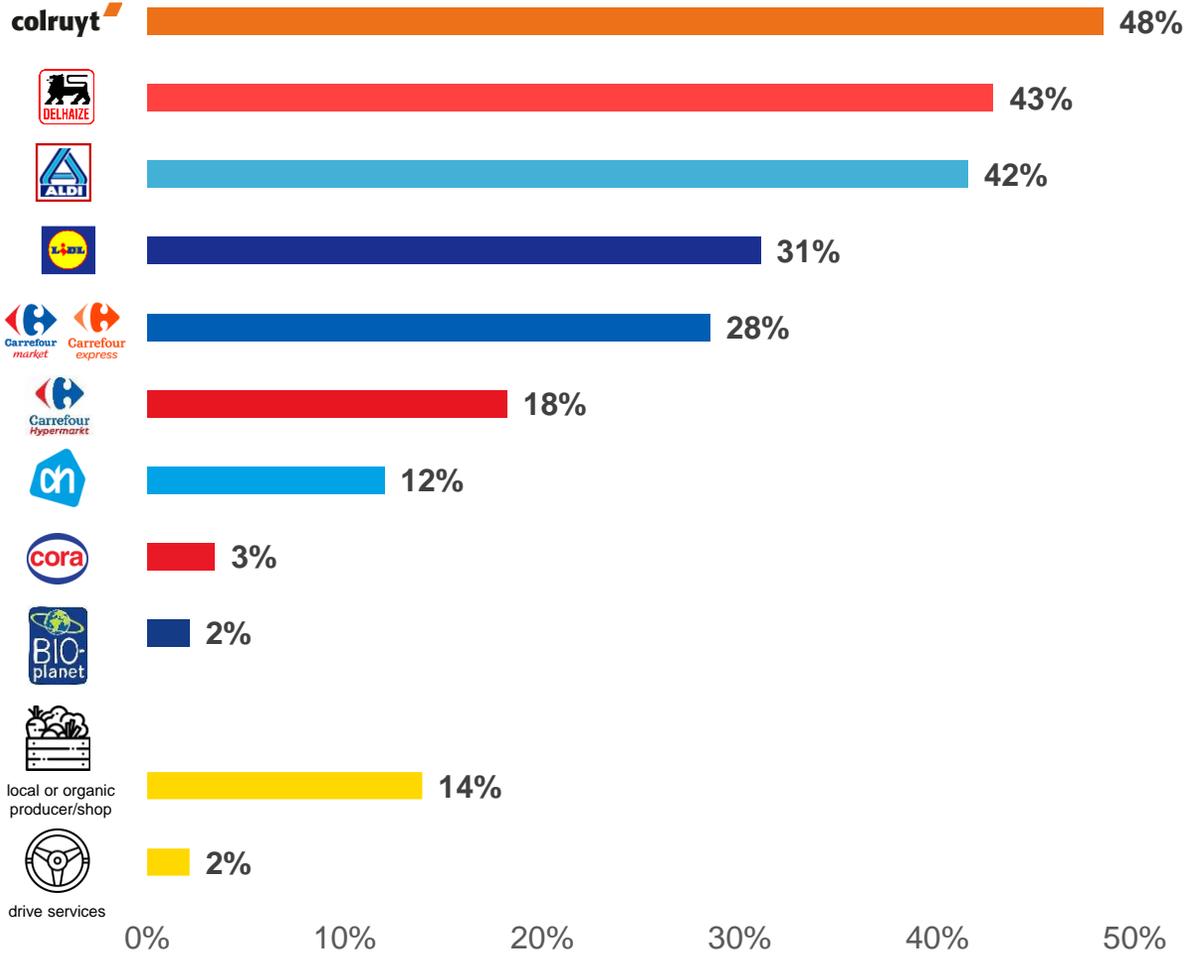


Coronavirus: 30% des clients de Delhaize ne respectent pas les règles de distanciation sociale - © Tous droits réservés  
Belga  
Publié le samedi 04 avril 2020 à 09h28  
rtbf.be

**3** **78%** Contamination by other shoppers is the biggest fear while shopping. Women and 25-34 y.o. are the most worried (81%).  
Young adults (18-24 y.o.) the less (68%)



# COLRUYT, DELHAIZE AND ALDI WERE THE MOST VISITED FOOD SUPPLIERS



## TOP 3 NL (ranked on selectivity)



## TOP 3 FR (ranked on selectivity)



## TOP 3 ♀ (ranked on selectivity)

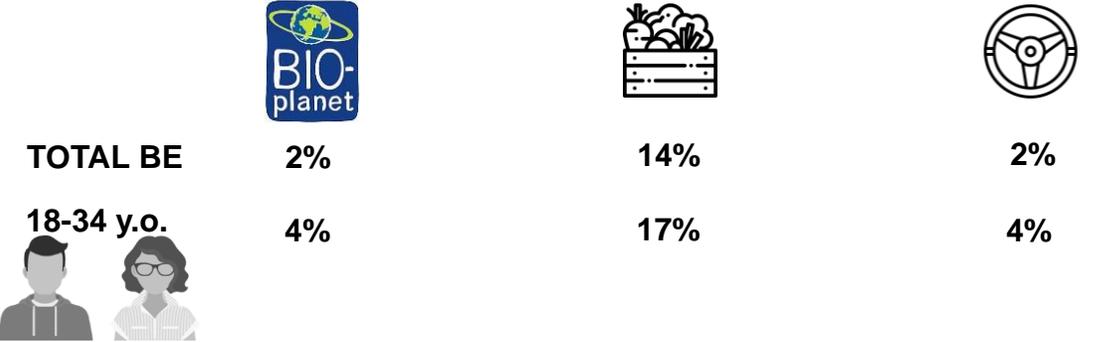


## TOP 3 ♂ (ranked on selectivity)



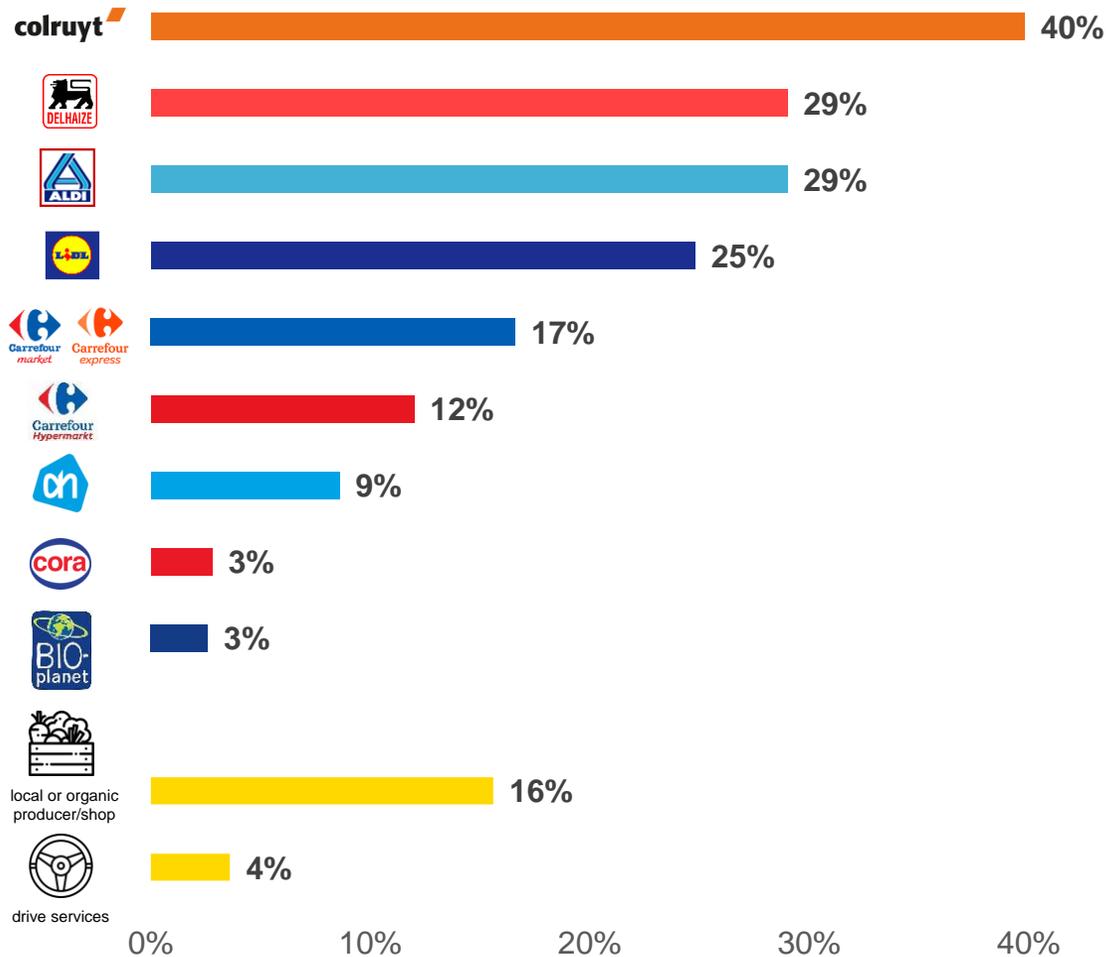
## YOUNGER ADULTS PREFER IT LOCAL AND ORGANIC

18-34 y.o. have more often mentioned organic or local shops and retail brands. Drive services from supermarkets and food retailers are not yet a thing. But younger adults are twice more numerous to be into it



Which supermarket chain or food supplier did you visit during the confinement period?

# 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)

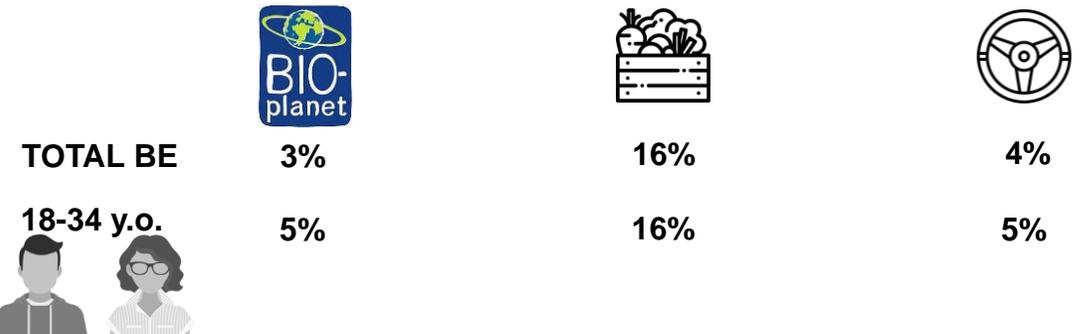


## TOP 3 ♂ (ranked on selectivity)



## 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)



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

# SOME FIRST CONCLUSIONS (and more to come)

## CREATURES OF HABITS

1

Spring cleaning, cooking, watching TV together with other household members, preparing the garden for a new season... There is something reassuring about cultivating habits. Especially when times are uncertain

## CREATURES OF HABITS... BUT OPEN FOR NEW ADVENTURES

2

Some favor physical shops, missing the human contact with local merchants (42%), other chose for online food retail services... The fact is: more Belgians than ever have find their way to e-food retailer. Other sectors, not as usual like gardening, also benefits from the confinement online

## MEDIA ARE A BASIC NEED

3

Just like eating or sleeping, media are part of our daily routine and rituals. More: they are a basic necessity fulfilling the need for information, reassurance, social exchange and entertainment



Should media continue to cover the actual health crisis with the same intensity? Opinions are varied on this topic with nearly the same amount of Belgians happy with the current coverage (45%) vs Belgians thinking media spend too much time to this topic (44%).

We have distilled some recent reports of White Corporate Affairs and Dedicated on the role and usage of media during the past few weeks.

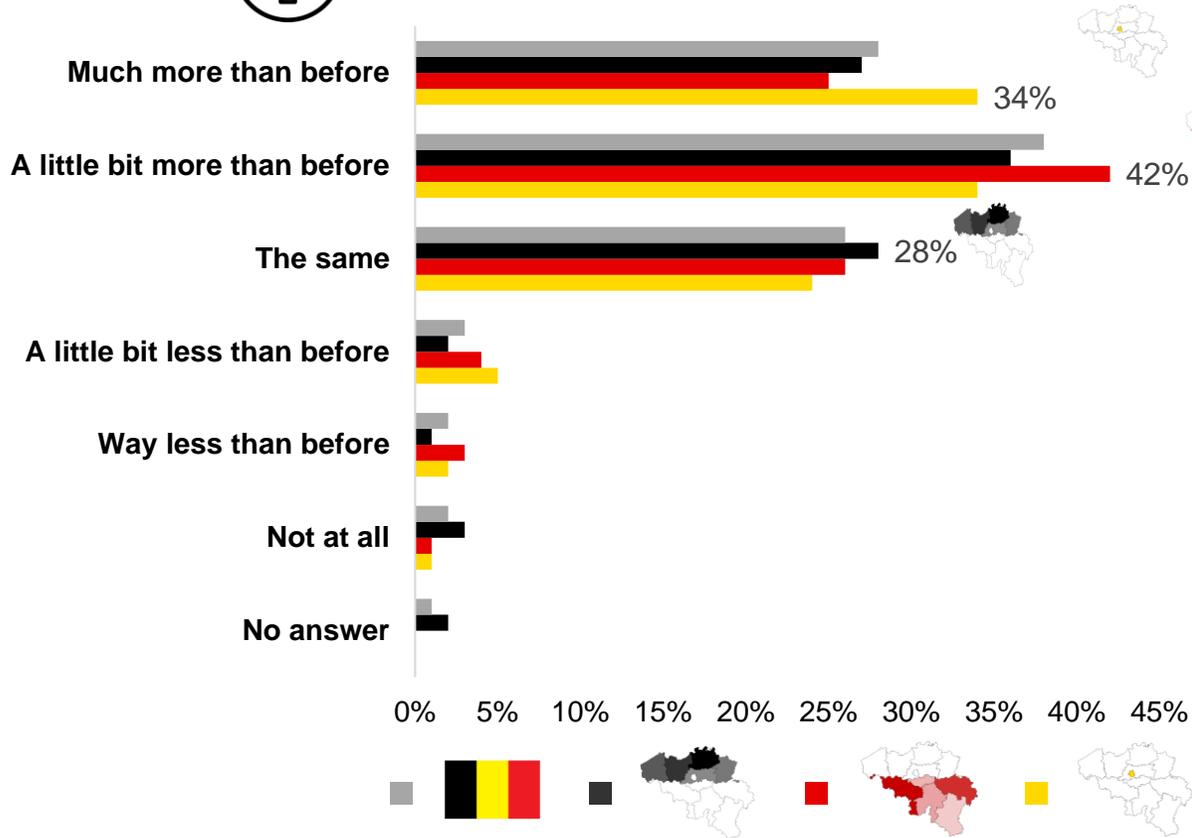


# BELGIANS INFORM THEMSELVES MORE THAN BEFORE

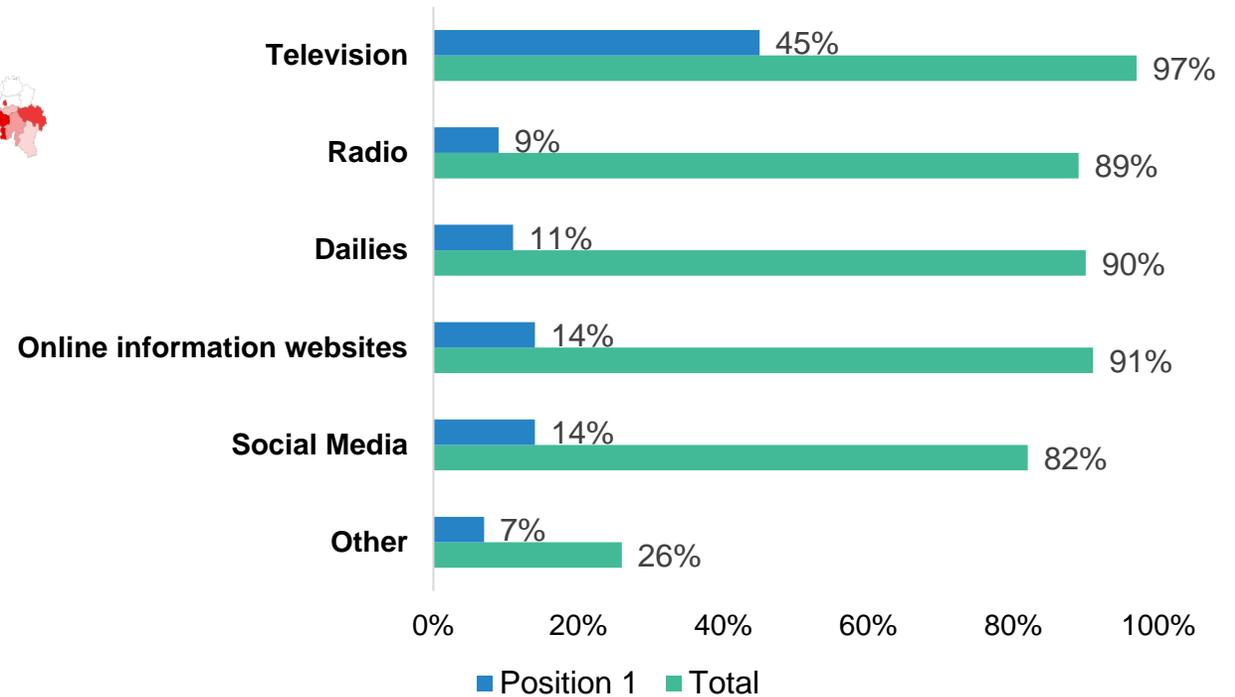
Especially French-speaking Belgians. Favorite media are TV, Radio and Press



## Searching for information



## Preferred media to find information





# MEDIA SHOULD CONTINUE THE COVERAGE OF THE CRISIS

But it should be balanced with other topics so it wouldn't be overwhelming



44%

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

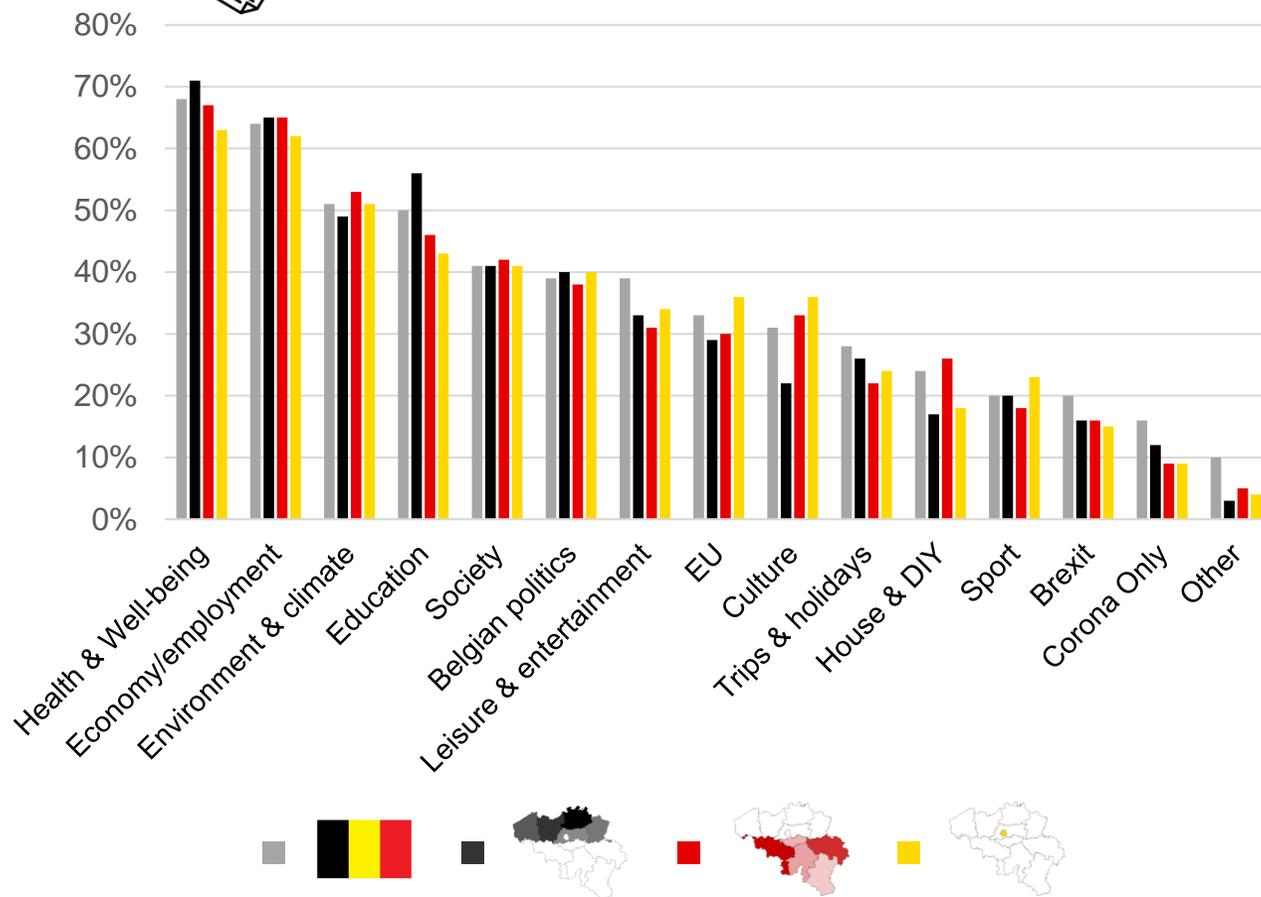
VS

45%

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



Expected content from the population





# CONSUMERS EXPECT TO HAVE MORE TIME FOR ENTERTAINMENT

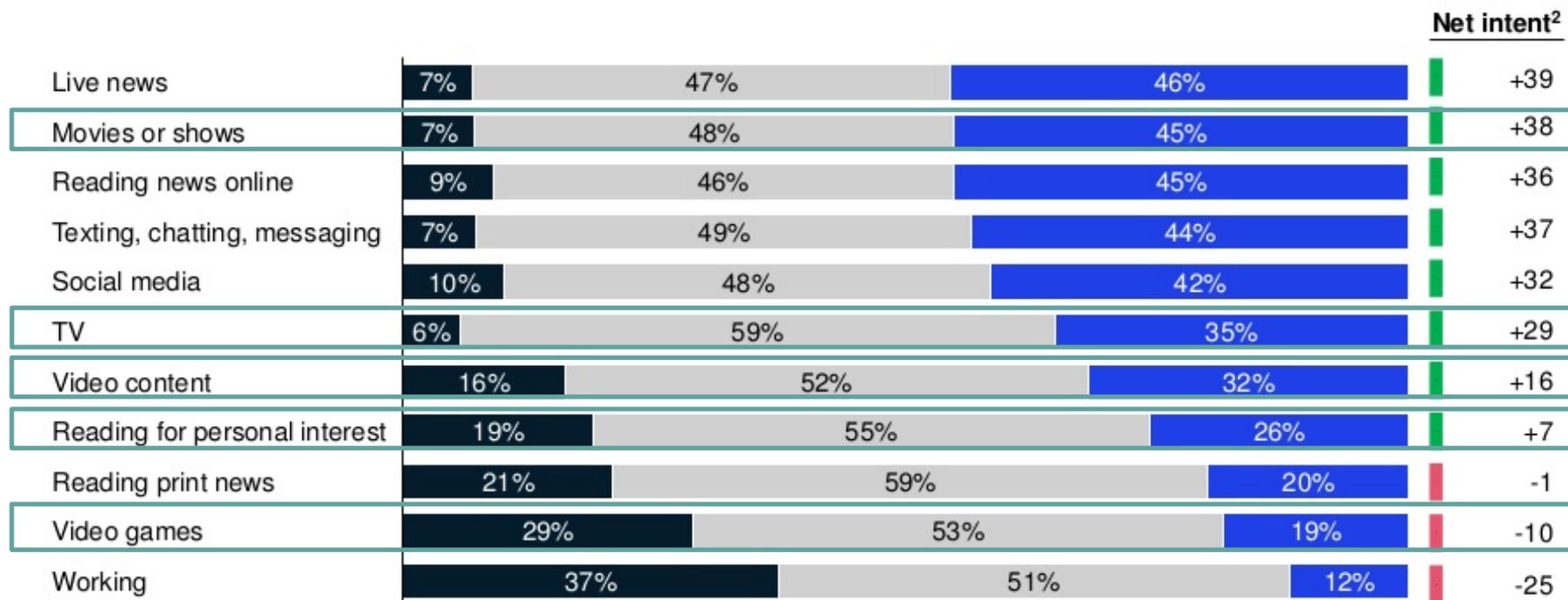
On the other hand, they expect to allocate less time to work, video games and printed news

McKinsey & Company

## Expected change to time allocation over the next two weeks<sup>1</sup>

% of respondents

■ Decrease ■ Stay the same ■ Increase



<sup>1</sup> Q: Over the next two weeks, how much time do you expect to spend on these activities compared to how much time you normally spend on them?; figures may not sum to 100% because of rounding.

<sup>2</sup> Net intent is calculated by subtracting the % of respondents stating they expect to decrease time spent from the % of respondents stating they expect to increase time spent.



# WEB

Hyperlocal news coverage still rules! But don't neglect thematic and dedicated media brands online: women's magazine brands do not suffer from the crisis online. At the contrary: the time spent with thematics about cooking & well-being has rocketed.

The last three weeks, the interest for immo has increased. But not all immo brands face the same situation in terms of visis.

And social? There is still a decrease compared to the weeks before the lockdown but brands are back on platforms!



# BELGIANS STILL SPEND MORE TIME ONLINE THAN BEFORE

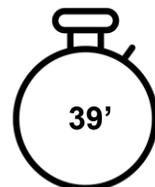
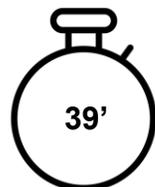
*And Flemish people are champions in spending time on Belgian sites*



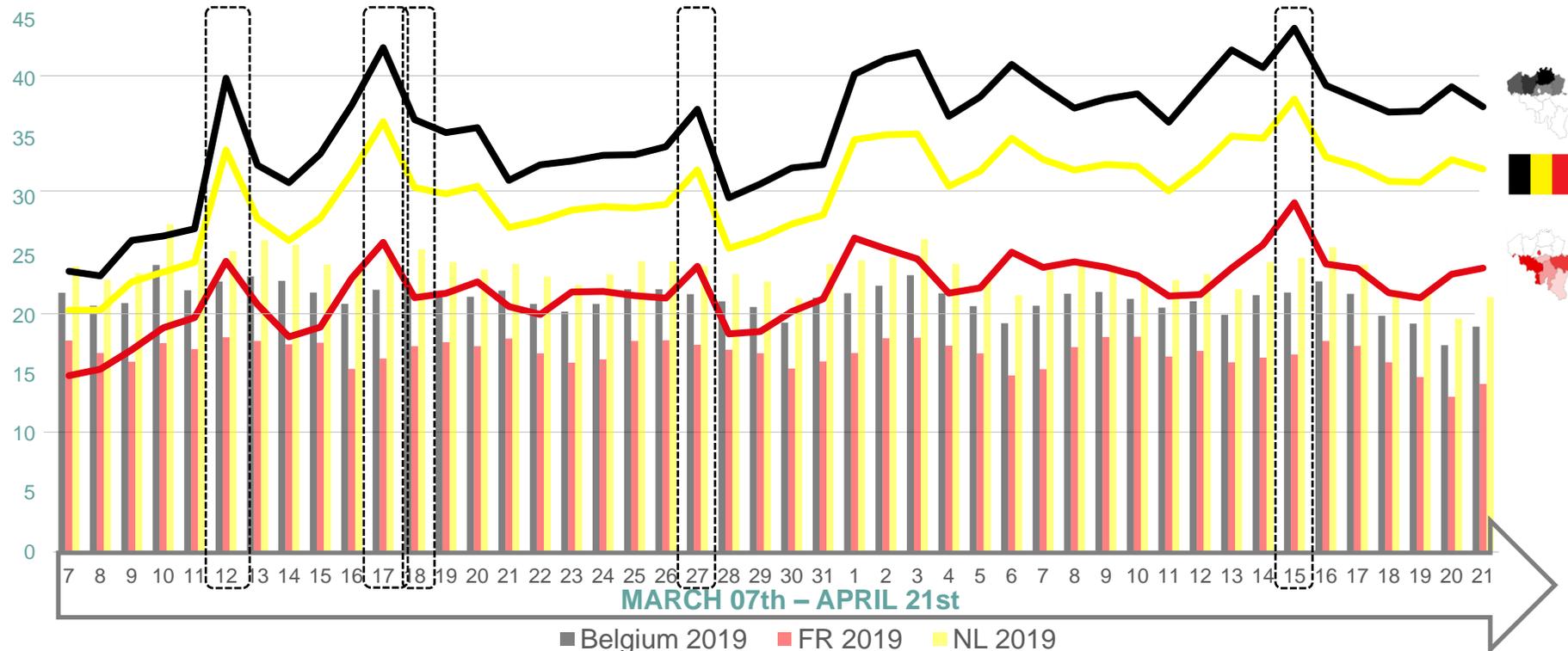
avg time spent on internet  
(in minutes)

08/04 > 14/04

15/04 > 21/04



avg time spent (min.)



MARCH 07th – APRIL 21st

■ Belgium 2019 ■ FR 2019 ■ NL 2019



# HYPERLOCAL NEWS DOMINATE IN THE NORTH



## TOP 3 audience share (21/04)

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



28%

Het Nieuwsblad

23%



9%

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

DeMorgen.

+ 16%



+ 11%



real users

2.000.000

1.800.000

1.600.000

1.400.000

1.200.000

1.000.000

800.000

600.000

400.000

200.000

0

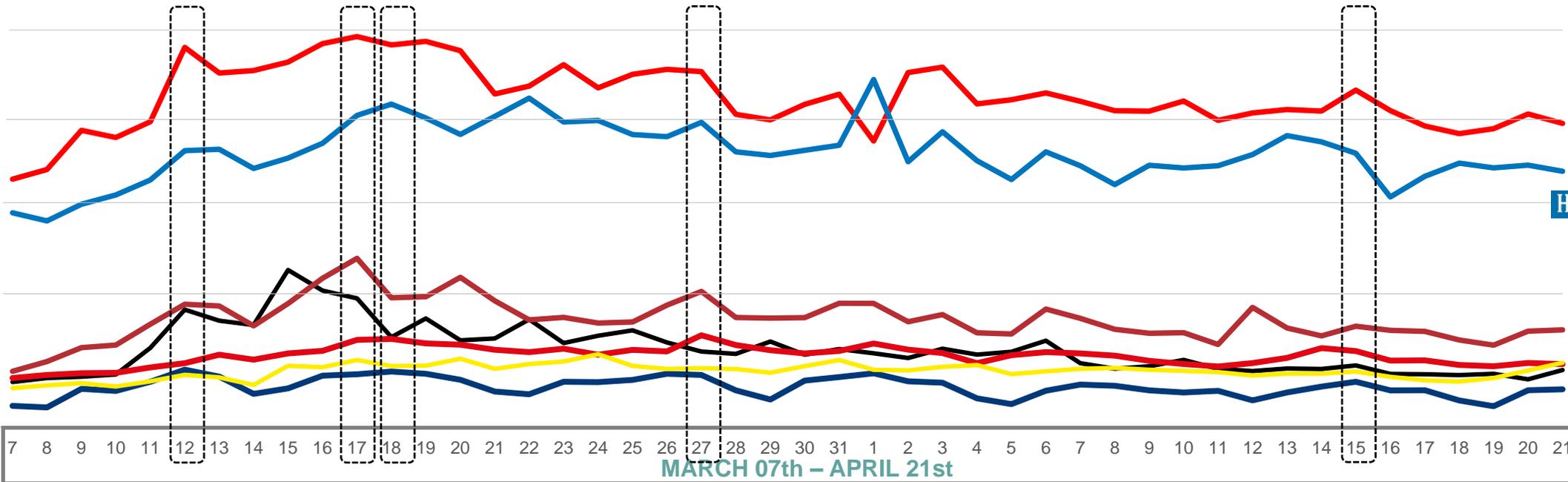
TOP 3



Het Nieuwsblad



dS De Standaard



MARCH 07th - APRIL 21st



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



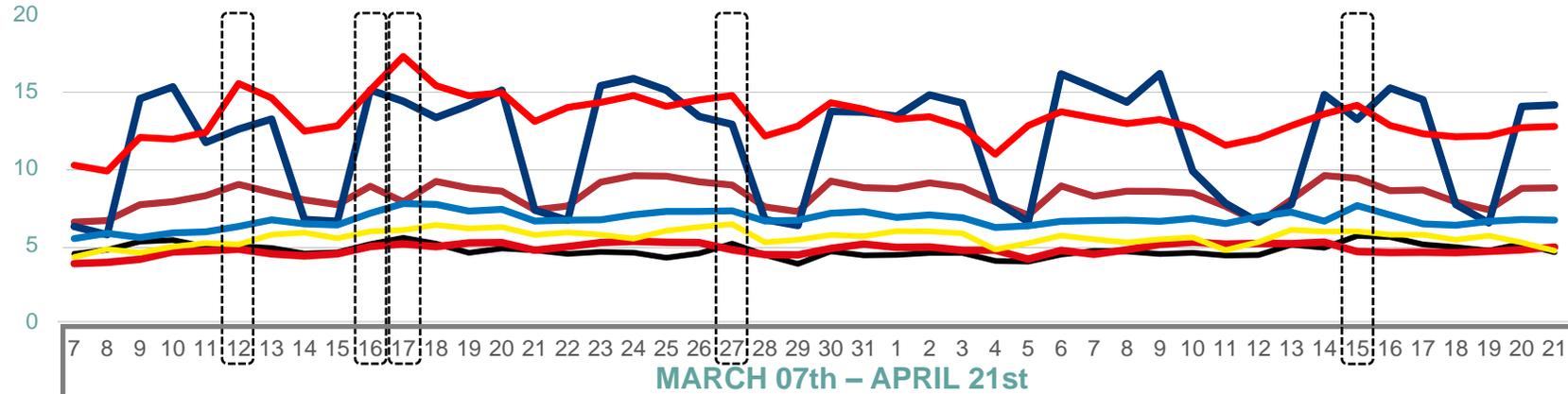


# FLEMISH SPEND MORE TIME ON *FINANCIAL* NEWS

## But view more content on hyperlocal news from HLN



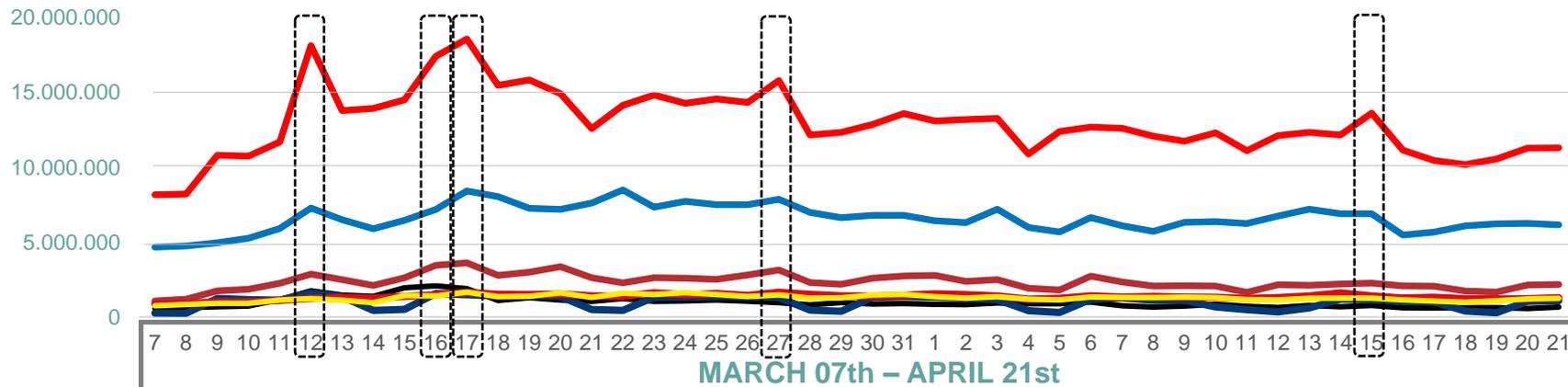
avg. time spent (min.)



TOP 3 evolution avg. time spent (21/04 vs 20/04)



pageviews



TOP 3 evolution pageviews (21/04 vs 20/04)





# SUDINFO RULES BUT IS CHALLENGED



TOP 3 audience share (21/04)  
(the share of the audience of the media in the total audience of all media)

Sudinfo.be

11%



9%

LE SOIR

9%

real users

1.000.000

900.000

800.000

700.000

600.000

500.000

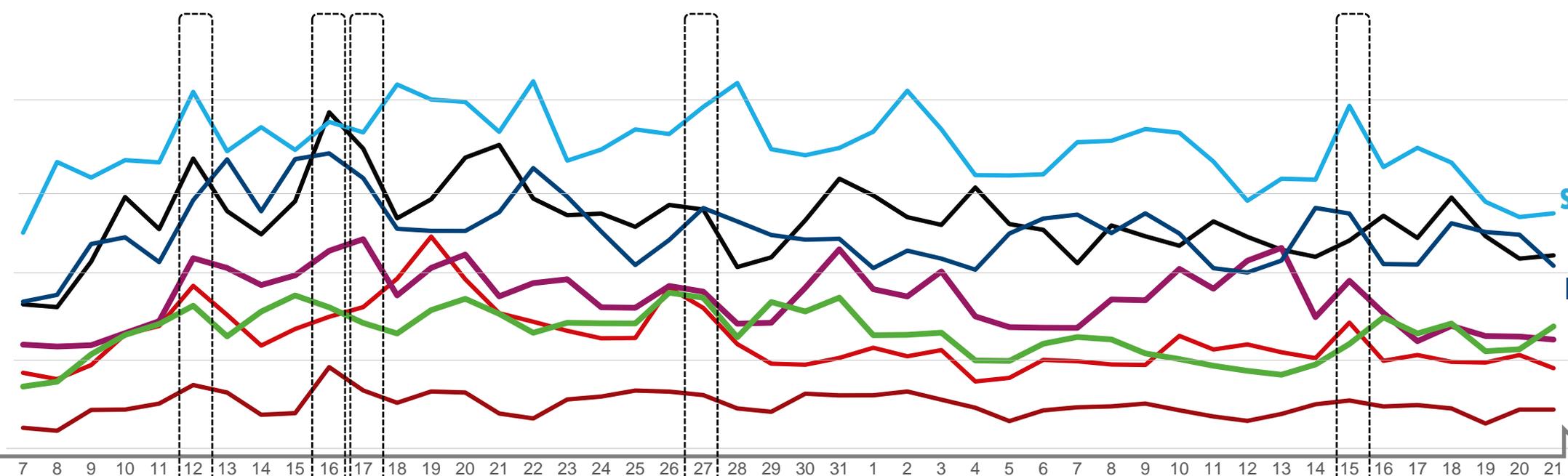
400.000

300.000

200.000

100.000

0



TOP 3

Sudinfo.be

DH

LE SOIR

MARCH 07th – APRIL 21st



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



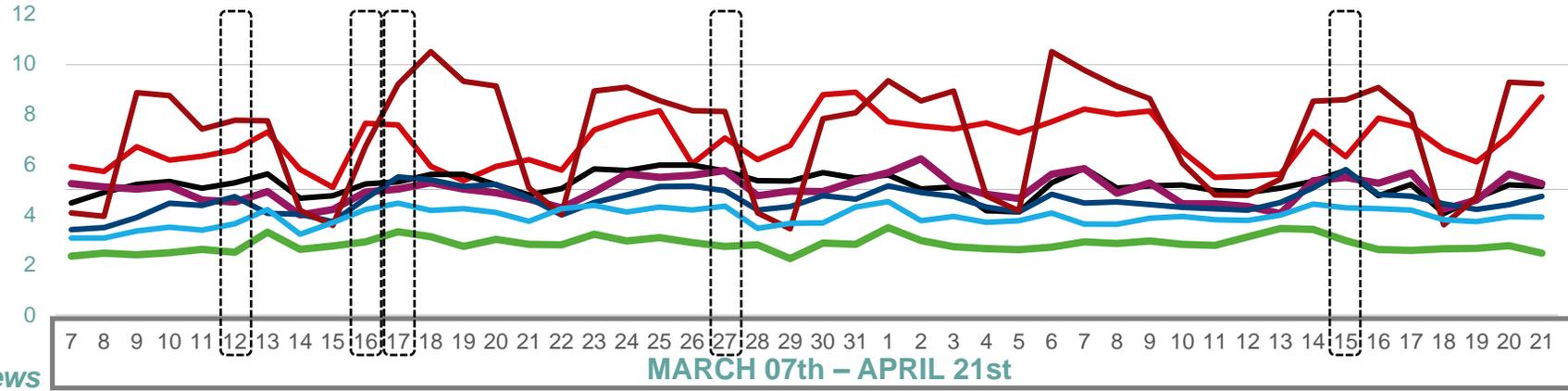


# WALLOONS SPEND MORE TIME ON *FINANCIAL* NEWS

## But consume more hyperlocal news



avg. time spent (min.)

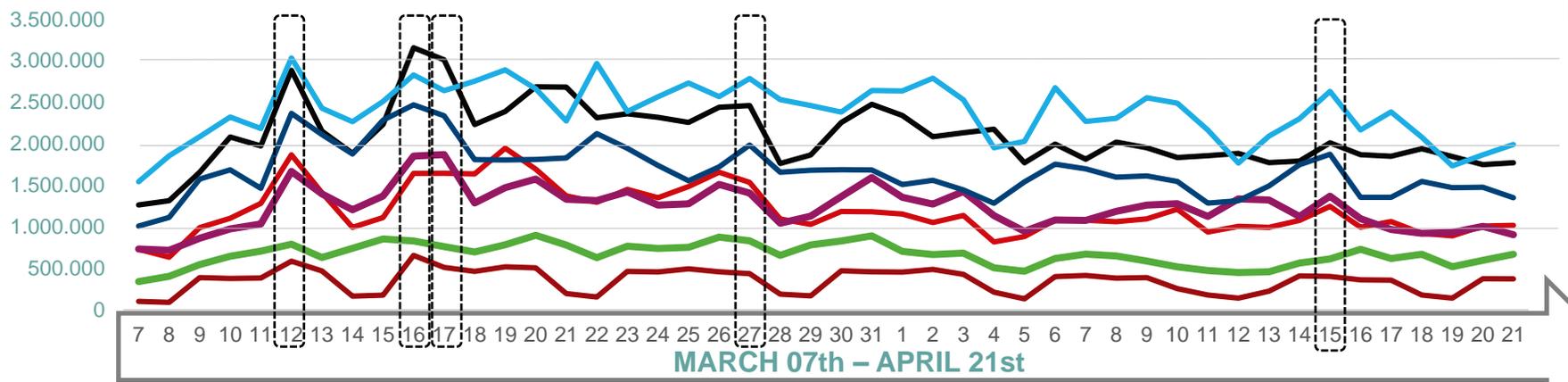


TOP 3 evolution avg. time spent (21/04 vs 20/04)



- 7sur7**  
+ 22%
- LE SOIR**  
+ 8%
- Sudinfo.be**  
+ 0%

pageviews



TOP 3 evolution pageviews (21/04 vs 20/04)



- l'avenir**  
+ 12%
- Sudinfo.be**  
+ 7%
- DH LES SPORTS**  
+ 1%



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



# INTEREST IN IMMO HAS INCREASED THE LAST 3 WEEKS

*But not all immo sites face the same situation: smaller sites are more resilient*

### evolution visits

01/03/2019 > 12/03/2019	VS	PRE-LOCKDOWN 2020 (01/03/2020 > 12/03/2020 VS 13/03/2020)
13/03/2019 > 21/04/2019	VS	LOCKDOWN 2020 (13/03/2020 > 21/04/2020)
PRE-LOCKDOWN 2020	VS	LOCKDOWN 2020



- 9%

+ 56%

+ 114%

- 18%

- 46%

+ 1%

+ 63%

- 42%

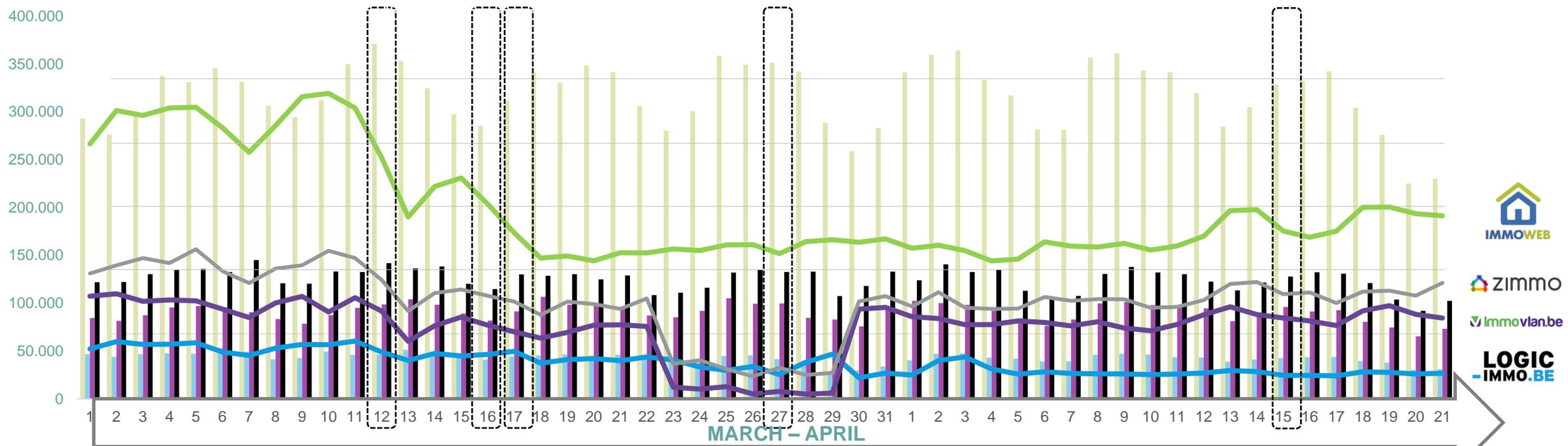
- 42%

- 34%

- 32%

- 40%

### visits



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





# WOMEN'S MAG DO NOT KNOW THE CRISIS (ONLINE)

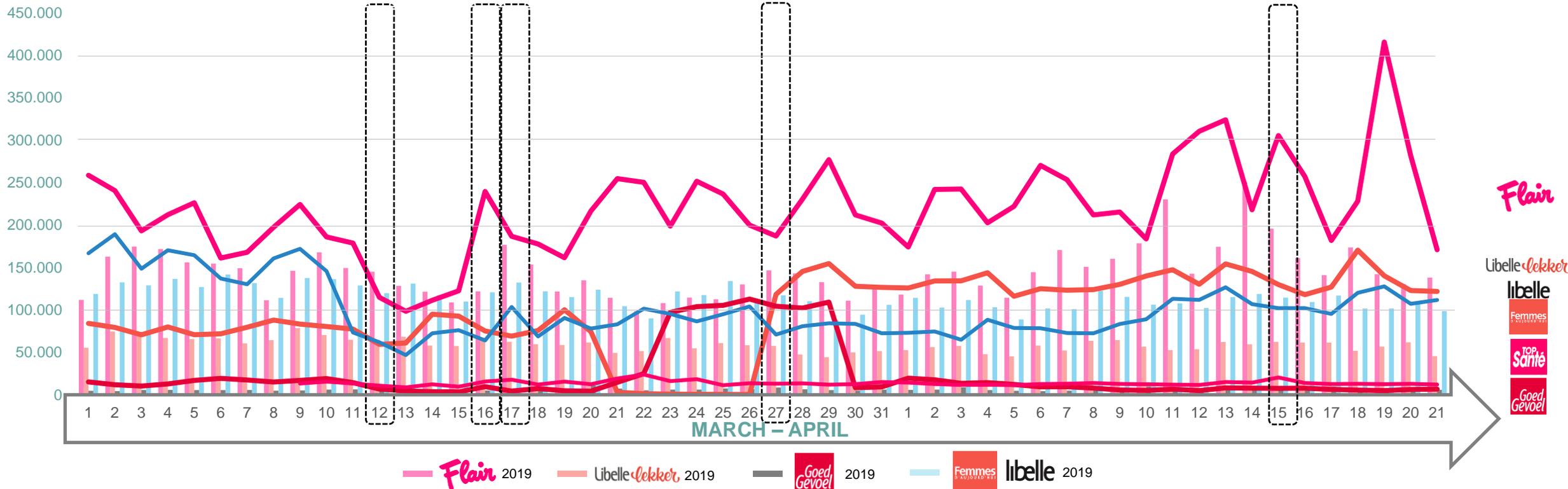
*Flair (National) and Libelle are stronger than ever*



## evolution visits

Period	Comparison	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 > 21/04/2019	VS LOCKDOWN 2020 (13/03/2020 > 21/04/2020)	+ 57%	- 20%	- 7%	+ 32%
PRE-LOCKDOWN 2020	VS LOCKDOWN 2020	+ 14%	- 38%	+ 34%	+ 74%

## visits



— Flair 2019 — Libelle lekker 2019 — Goed Gevoel 2019 — Femmes libelle 2019



# Thematics take all the attention (recipes, health & well-being)

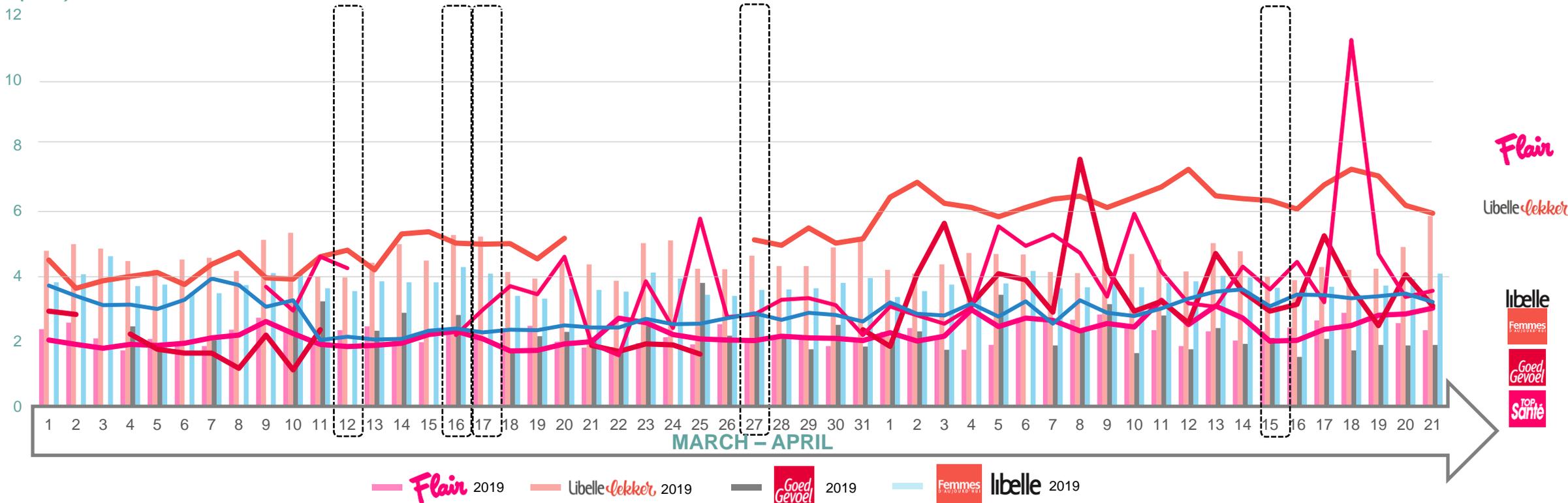
## The recipes from Libelle and healthy tips of Goed Gevoel to feel better?



### evolution visits

Period	Comparison	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)	- 7%	- 18%	- 9%	- 23%
13/03/2019 > 21/04/2019	vs LOCKDOWN 2020 (13/03/2020 > 21/04/2020)	+ 3%	- 24%	+ 31%	+ 41%
PRE-LOCKDOWN 2020	vs LOCKDOWN 2020	+ 15%	- 10%	+ 41%	+ 59%

avg. time spent (min.)



Source : Gemius/CIM - gemiusAudience study: Multiplatform - Population 12+. Gaps = no data available via EGemius

# THE IMPORTANCE OF SOCIAL

## SOCIAL MEANS CONNECTING

**1** **43%** of Belgians mentioned social media as a main activity last week



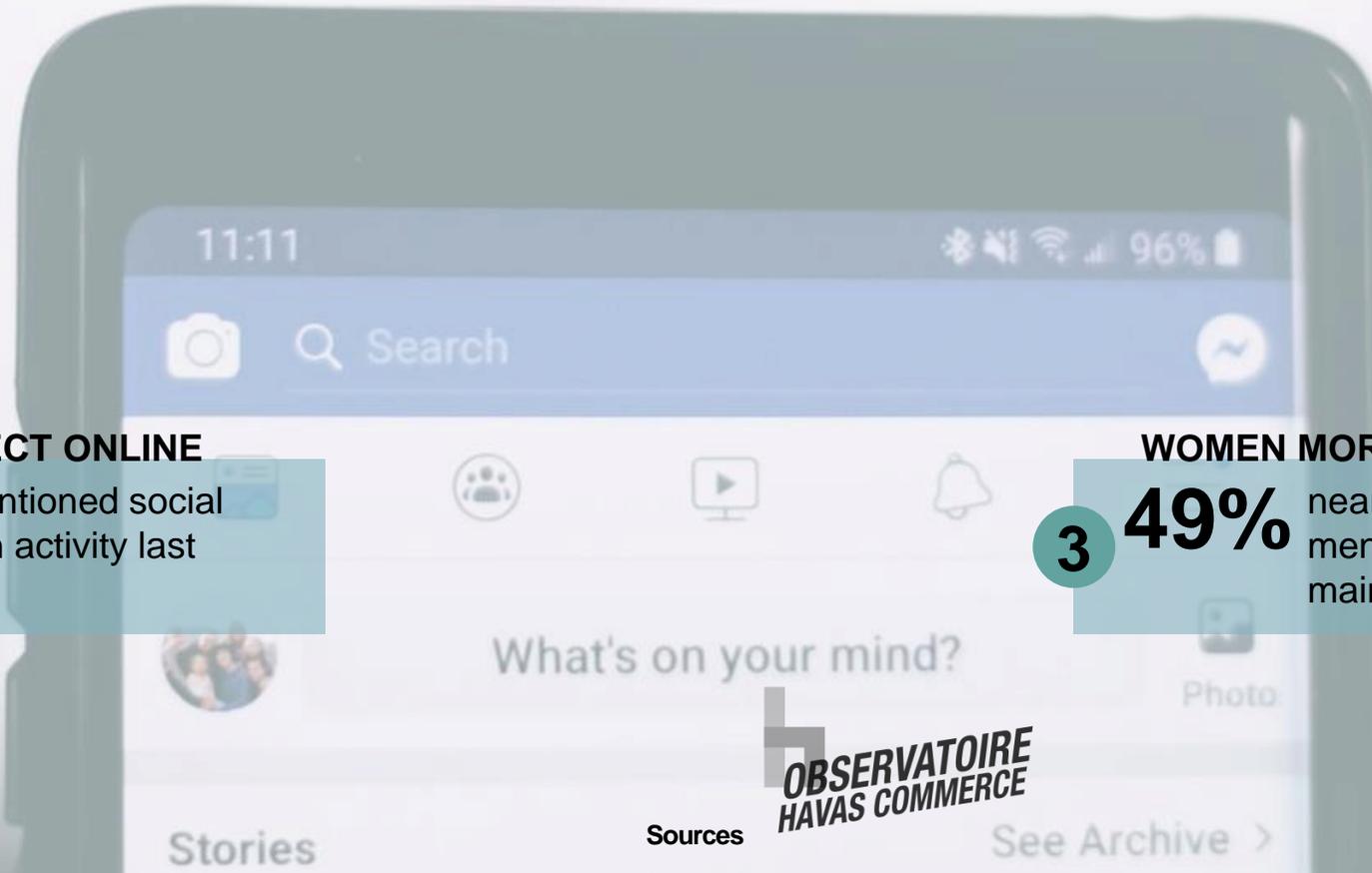
## YOUNG ADULTS CONNECT ONLINE

**2** **62%** of 18-24 y.o. mentioned social media as a main activity last week



## WOMEN MORE ADDICTED THAN MEN

**3** **49%** nearly 1 out of 2 women mentioned social media as a main activity (vs 36% men)



**OBSERVATOIRE  
HAVAS COMMERCE**

Sources

See Archive >

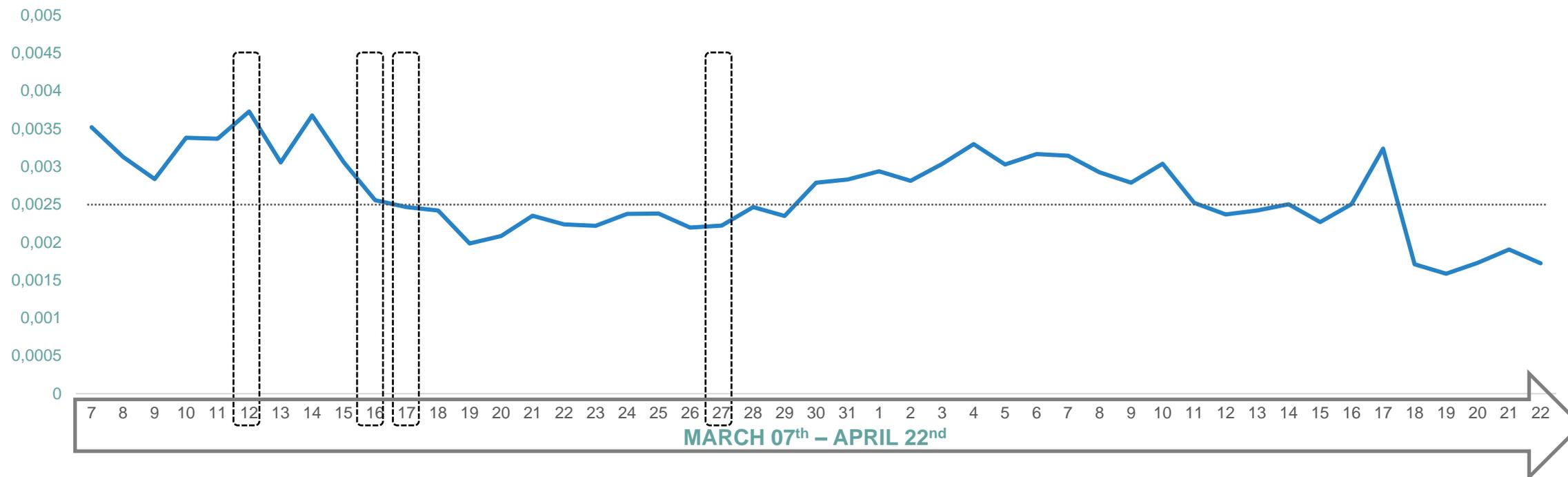


# BRANDS ARE (CAUTIOUSLY) BACK ON PLATFORMS



While we see an increase over the last 2 weeks, showing that brands have adapted their communication in *Social* and have started talking again, there is still a decrease compared to the weeks before the lockdown

avg CPR



BRAND  
OPTIMISM

# INFLUENCERS ARE WORKING FROM A NEW ANGLE

## Promoting local & expertise

Influencers who have lost a part of their income due to the pandemic have found a new way to create content on their own. Others have shifted to TikTok, the #1 in Entertainment on Apple Store



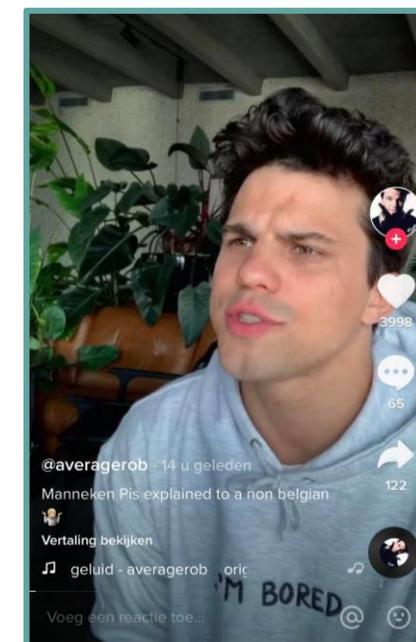
*Influencers are raising money for good causes and using their platforms to promote local shops for free*



*Actors and comedians are keeping their fans entertained from home*



*Make-up artist Sabine Peeters shares her expertise with a weekly IGTV called Corona Cosmétique*



*With more free time in their schedules, influencers have shifted to TikTok*



# TELEVISION

Back to normal? Not yet... but the interest in news is declining...

In both parts of the country, people are looking for escape, challenge and...  
**LOVE**

Discover the focus of the week on how Covid-19 crisis impacts 5 major TV shows as *De Mol*, *Blind Getrouwd*, *Mariés au premier regard*, *Koh-Lanta* & *Top Chef*.

# GOOD TO KNOW

## TV AS A MAJOR MEDIA

**1** **63%** of Belgians mentioned TV as their primary information source

## TV AS THE TRUSTED PARTNER

**2** **45%** of Belgians mentioned TV as the most important media to follow Covid-19 news

## TV WATCHING WITH MEMBERS OF THE HH

**3** **2<sup>nd</sup>** main activity of Baby boomers past week

## TV WATCHING WITH MEMBERS OF THE HH

**4** **7<sup>th</sup>** main activity of 18-34 y.o. past week

Sources

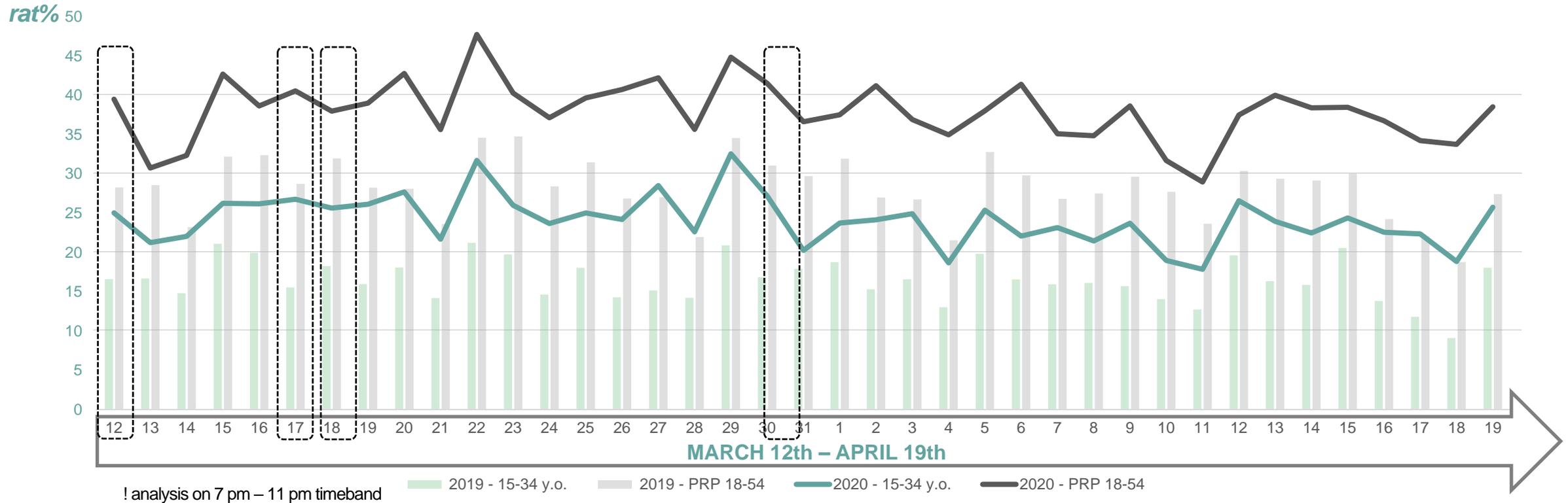


# ENTERTAINING REALITY & (LOCAL) MUSIC SCORE

## At the expense of NEWS



Sunday is always the weekly appointment for the Flemish population with *De Mol* (VIER) and *Blind getrouwd* (VTM). *Liefde voor Muziek* (VTM) ranked on 2<sup>nd</sup> position in the TOP 10 programs for 15-34 & PRP 18-54 targets, before *Blind getrouwd*. The new TV program *Lego Masters* (VTM) maintained its position in the TOP 5 programs on the PRP 18-54 target. Local TV soaps *Thuis* (EEN) & *Familie* (VTM) consolidated their place in the TOP 10 for both targets.



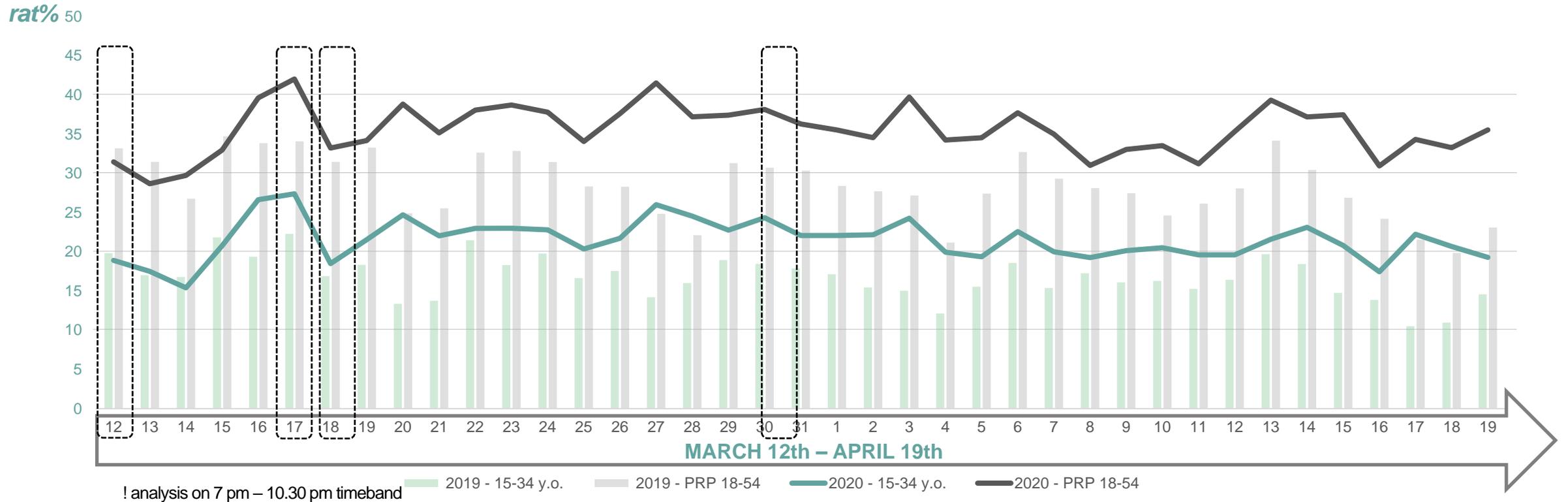


# NEWS & ENTERTAINMENT RULE

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



RTL dominates the TOP 10 programs (Live +7) last week (April 13<sup>th</sup> – April 19<sup>th</sup>). Thanks to its daily news program *RTL Info 19h*. Amongst entertainment programs, reality shows as *Koh-Lanta* (TF1) and *Mariés au premier regard* (RTL-TVI) were head to head in the TOP 5 programs on both targets 15-34 and PRP 18-54. *Enquêtes* (RTL-TVI) still remain in the TOP 10. We can also notice the appearance in the TOP 10 of the *JT Special edition* of La Une on April 15<sup>th</sup> for both targets.





# TV VIEWING IS STILL ON TOP!

Rising trend in the North after a small decline... similar trend in the South due to weather conditions?

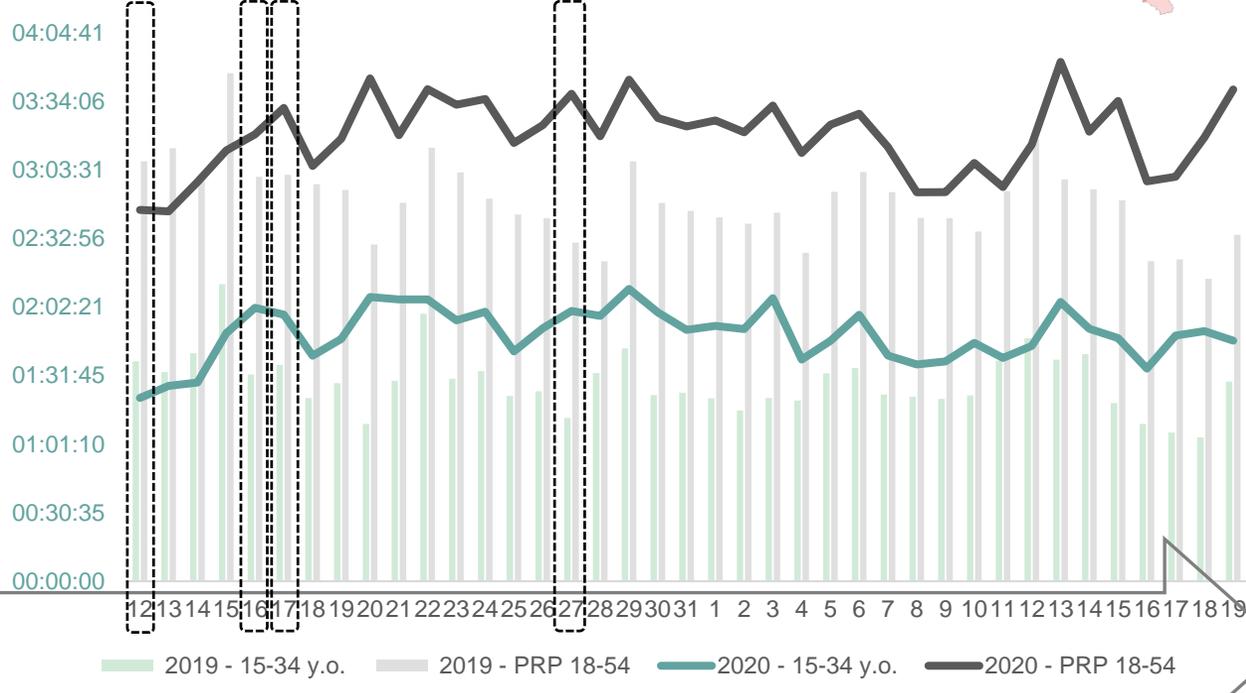
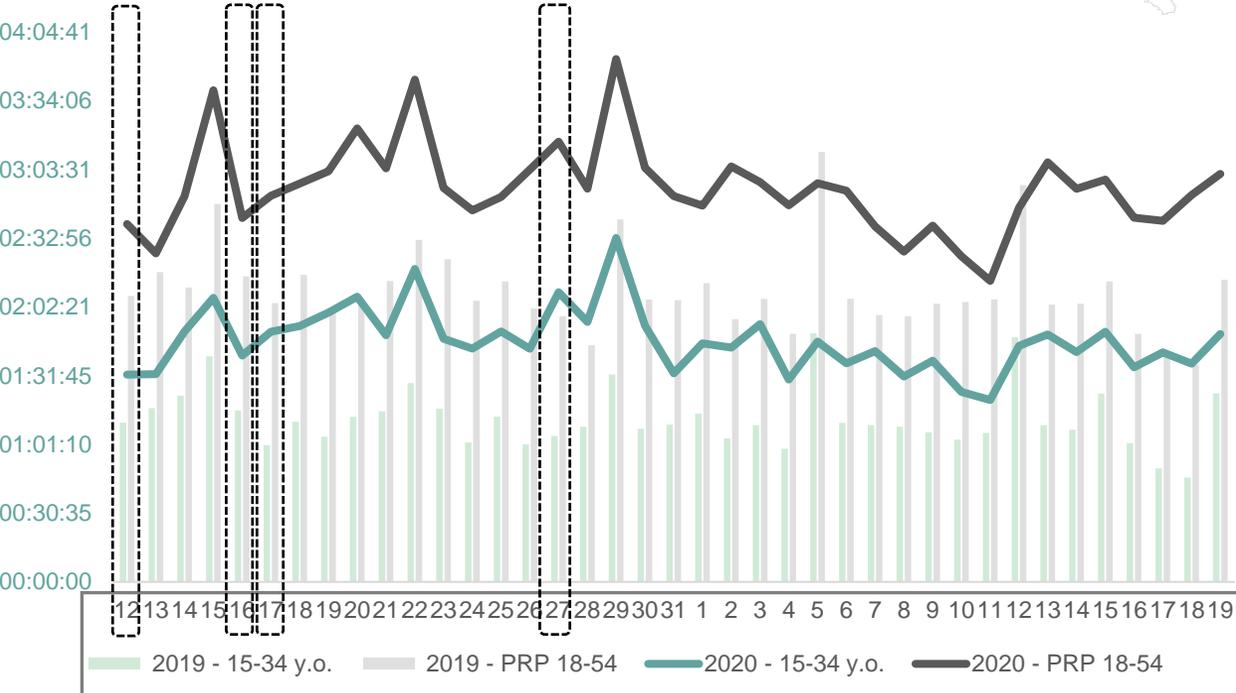


2 am-2 am

avg time spent (hours)



avg time spent (hours)



MARCH 12th – APRIL 19th



Source: Havas Media BE elaboration of Nielsen / GfK data - Live + Vosdal. ALL DAY LONG: 2 am – 2 am

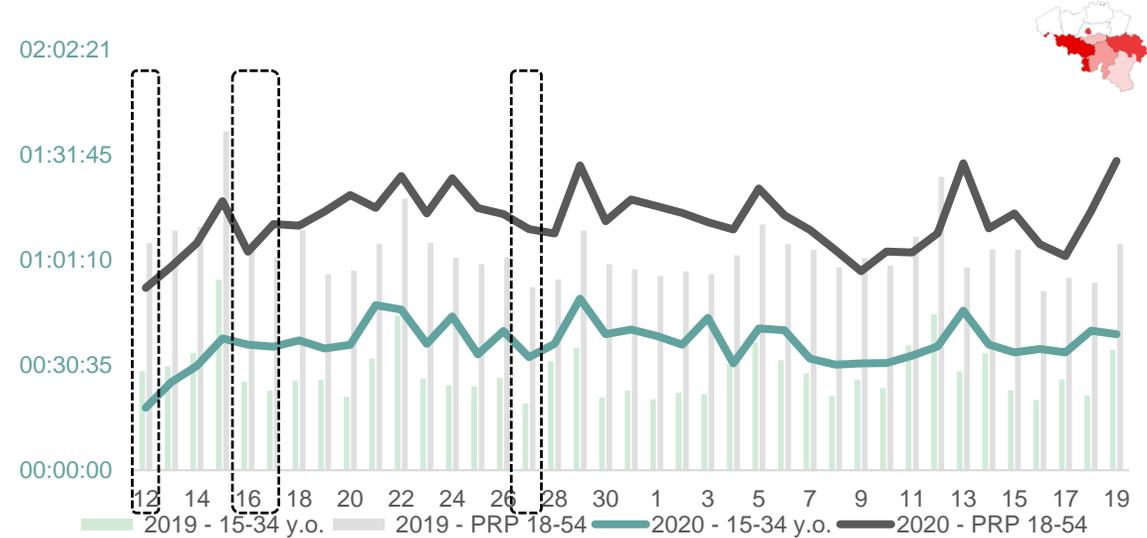
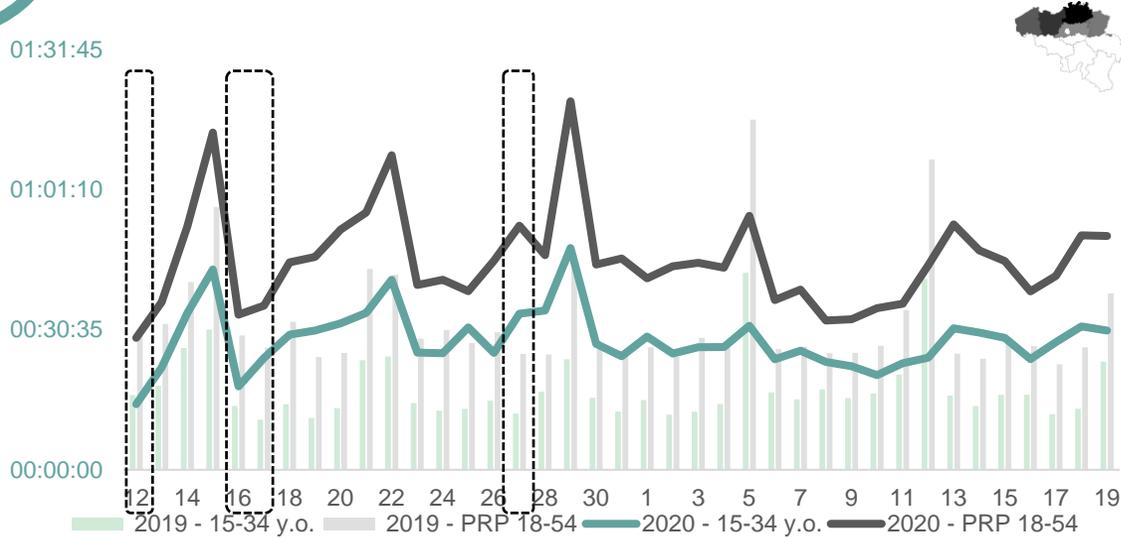


# ... SLOWLY BACK TO NORMAL...

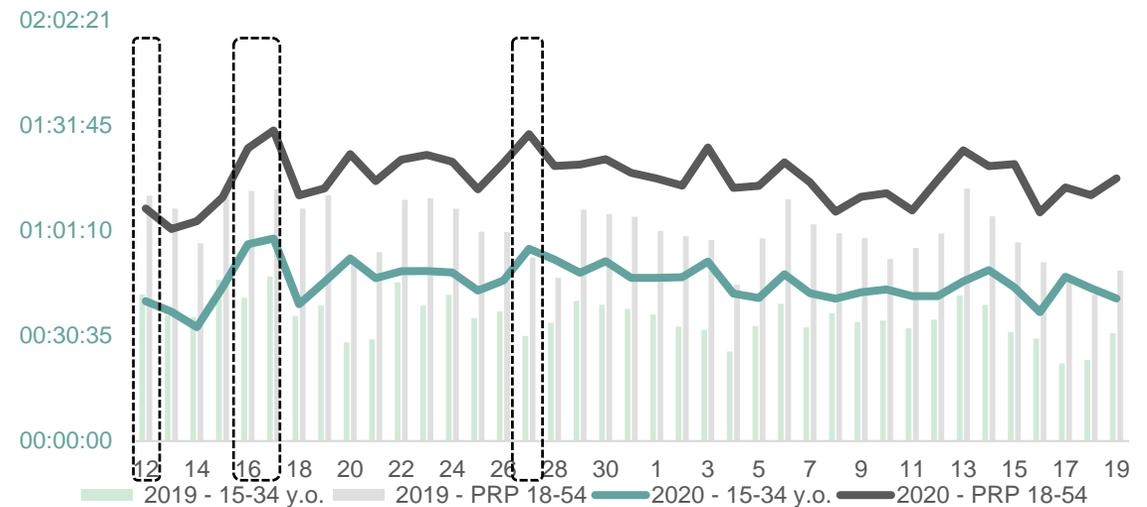
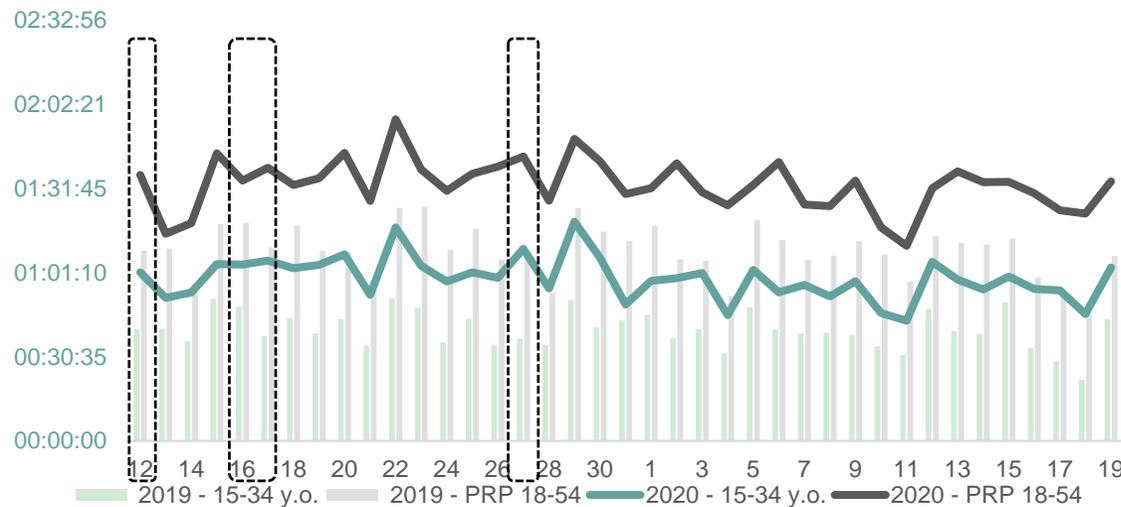
## With a particular drop during day time



2 am-5 pm



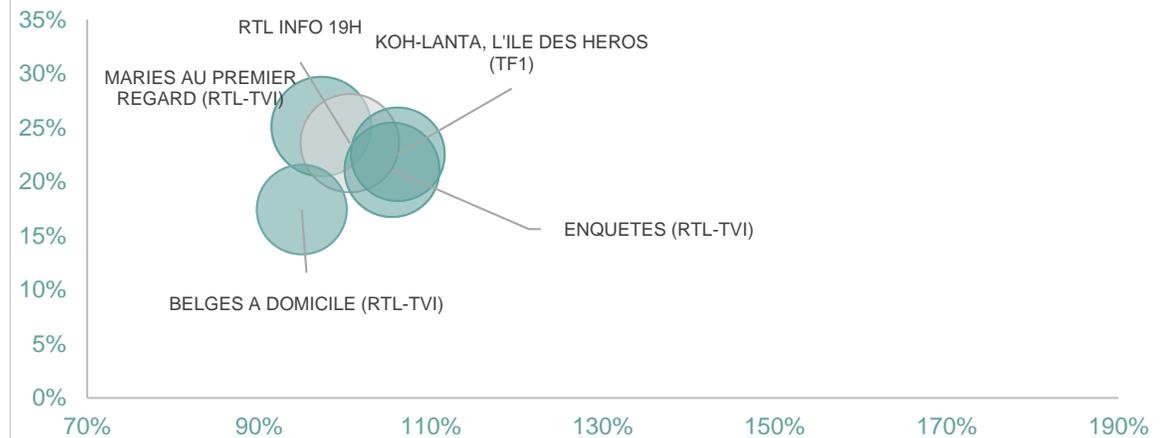
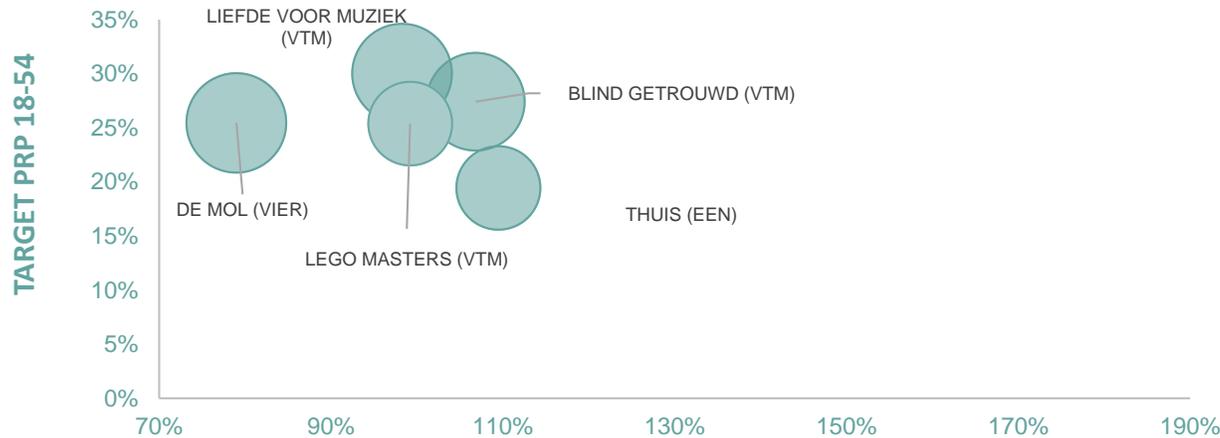
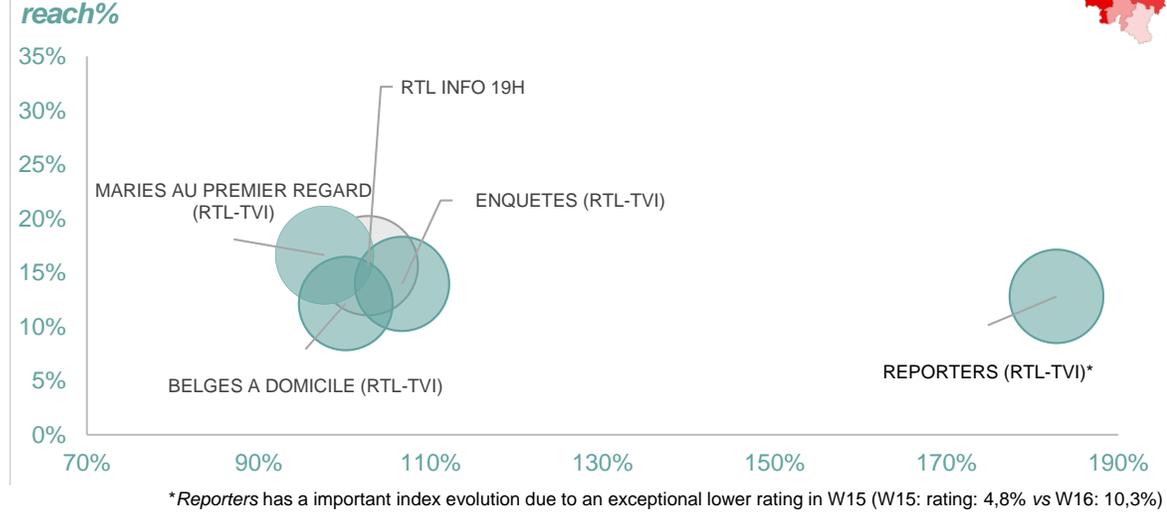
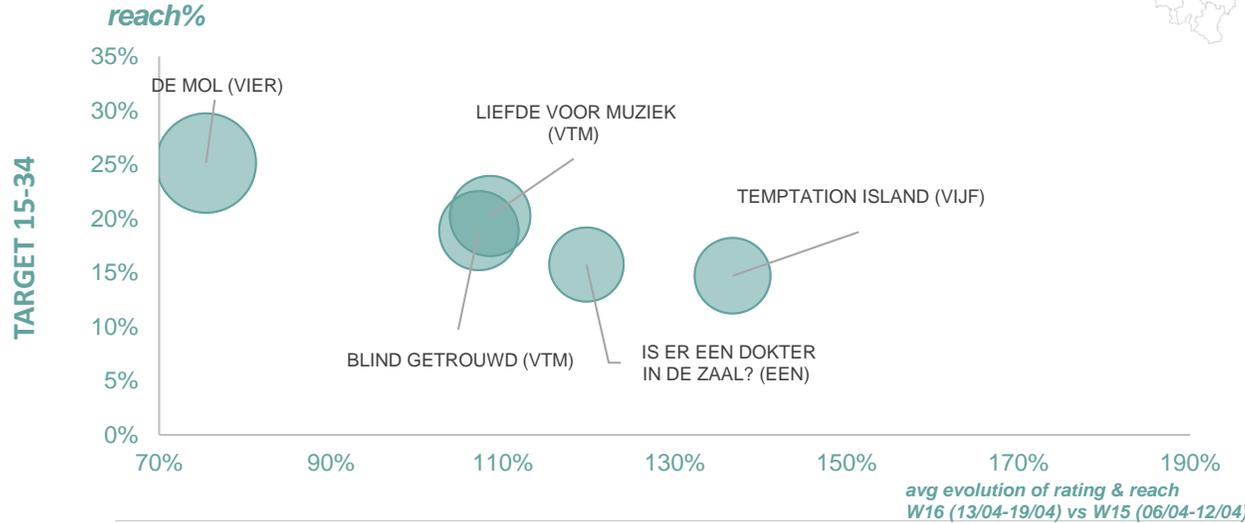
7 pm-11 pm





# LOVE IS IN THE AIR

Flemish got a Lego brick in the belly, French-speaking into infotainment



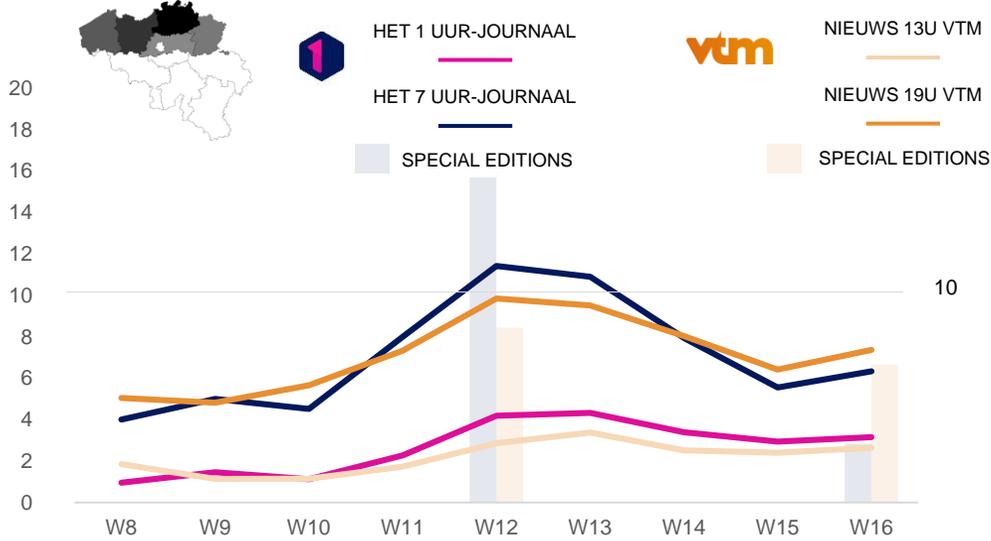


# INTEREST FOR NEWS IS DECLINING

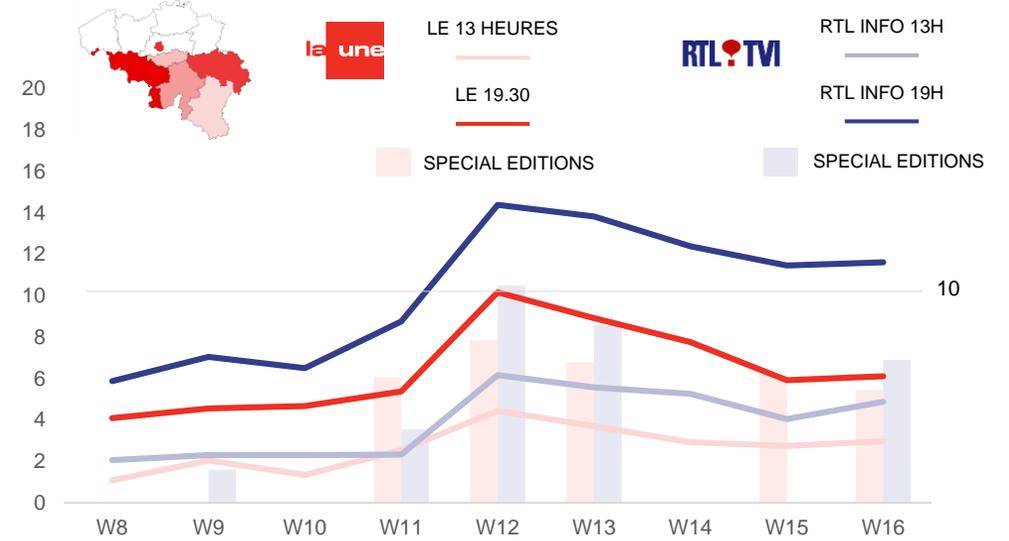
VTM NIEUWS leads the way in the North, RTL INFO maintains its leader position in the South

TARGET 15-34

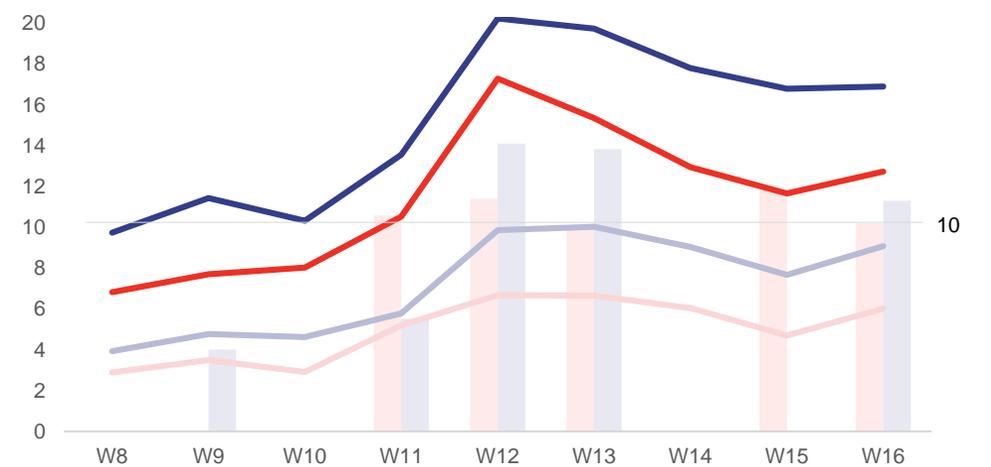
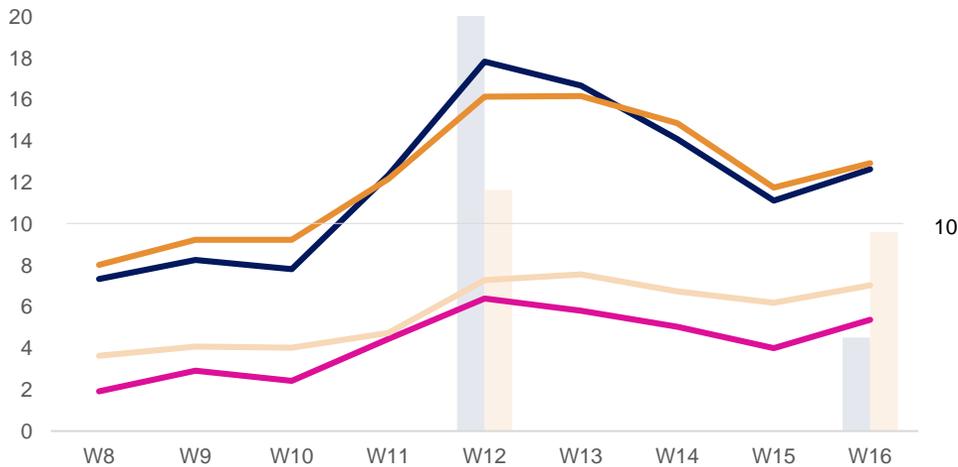
rat% average



rat% average



TARGET PRP 18-54



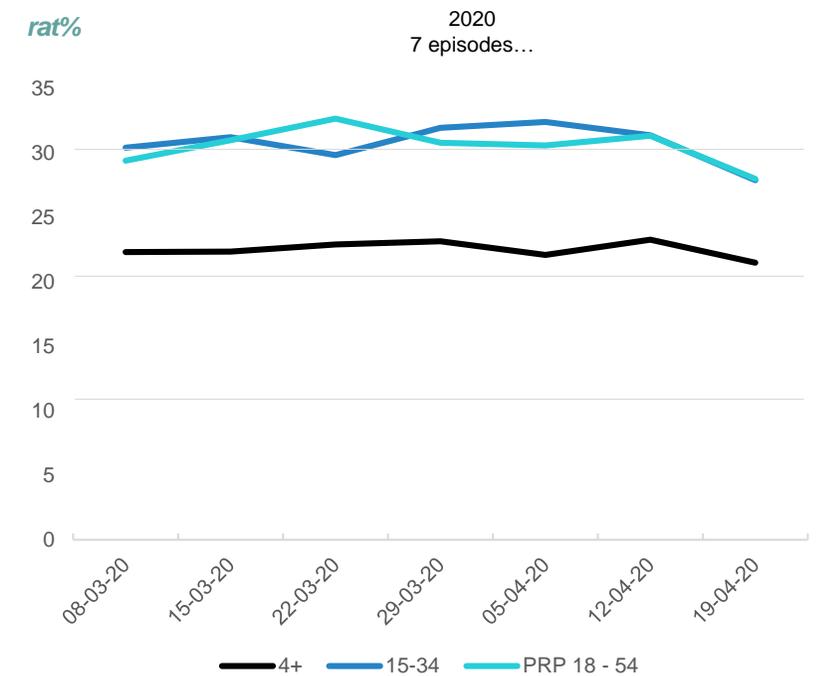
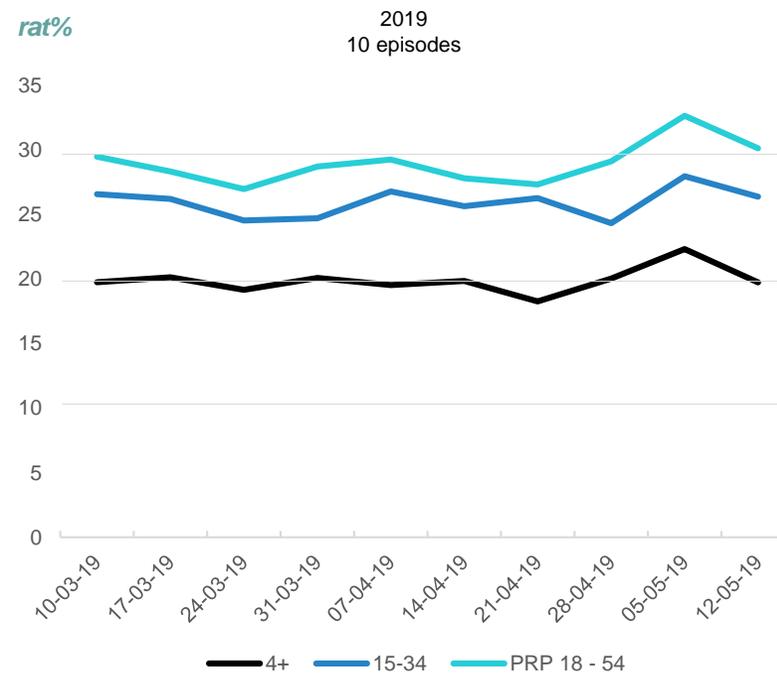
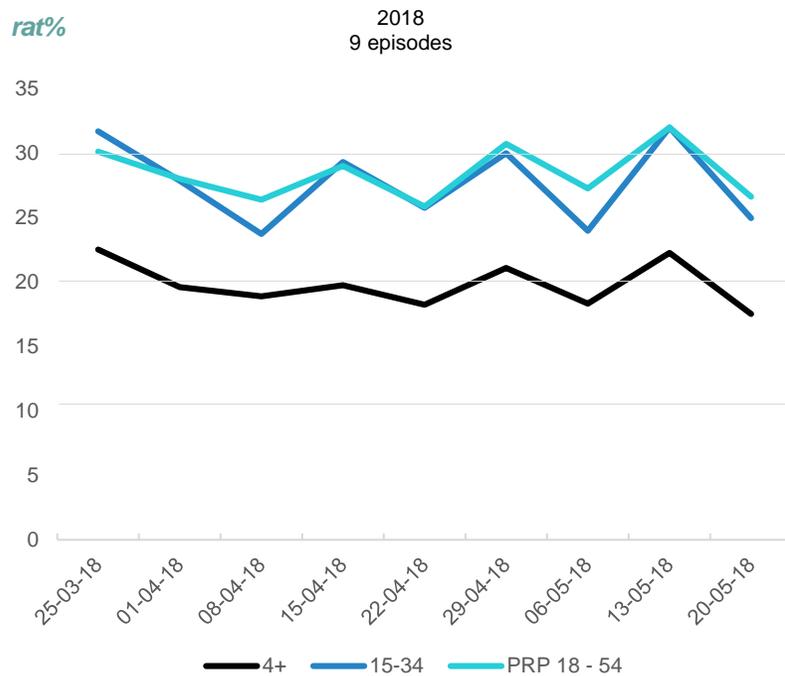


# DE MOL

## ALWAYS A SAFE BET



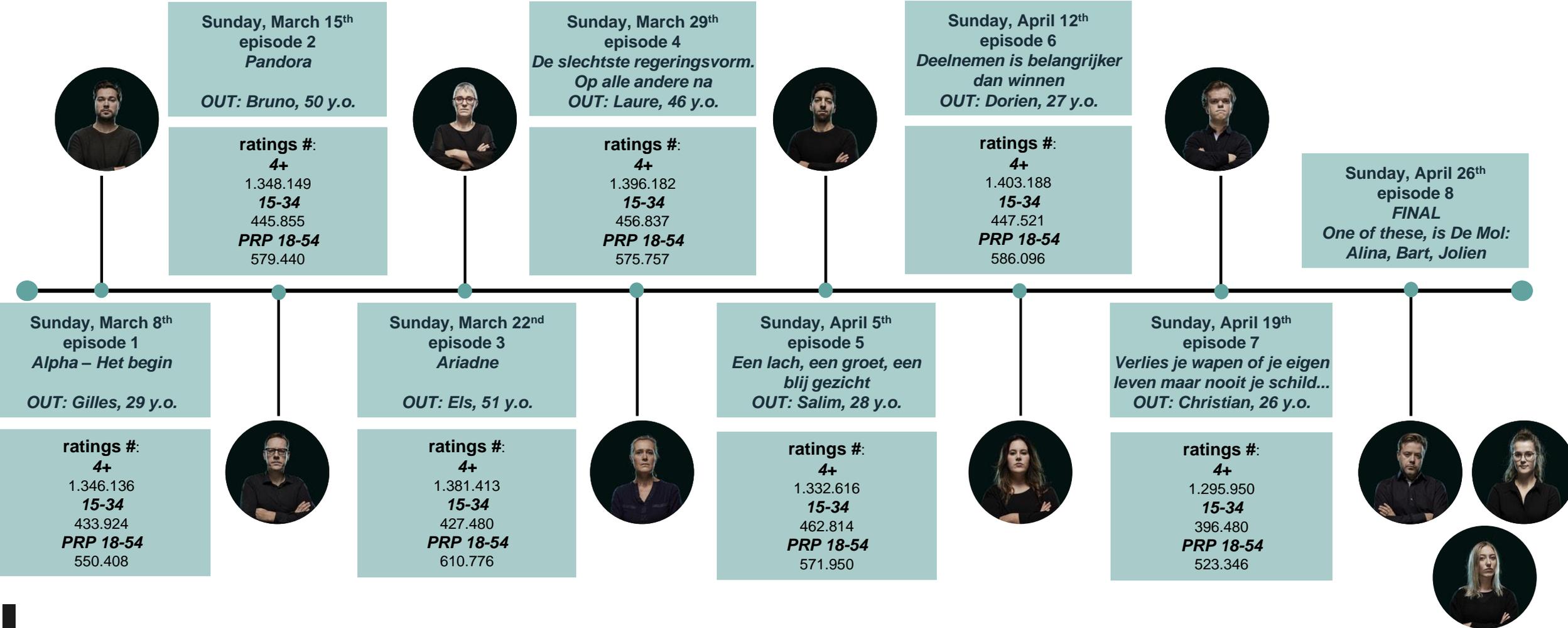
Year after year *De Mol* maintains its position of TOP Program in Flanders, keeping its audience ratings high. *De Mol* has even increased its average audience by +13% between 2019 and the current edition for 4+ target and +17% for 15-34. For the PRP 18-54 target, ratings are stable. Audience peaks are observed for final episodes of each season: May 13th in 2018, May 5th in 2019. After a lower success last week, how will the final rate this year? Answer on next Sunday!





# DE MOL

## FOCUS ON 2020 EDITION



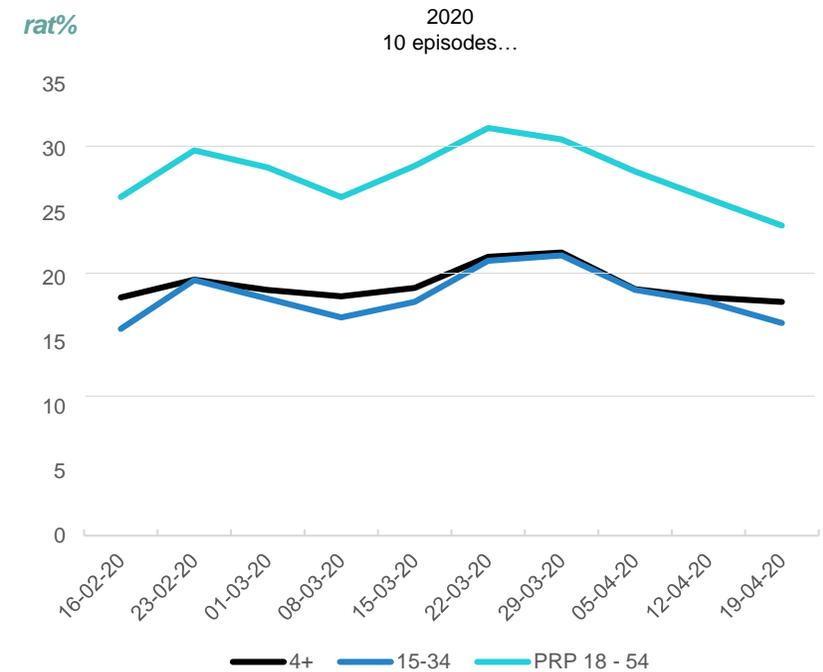
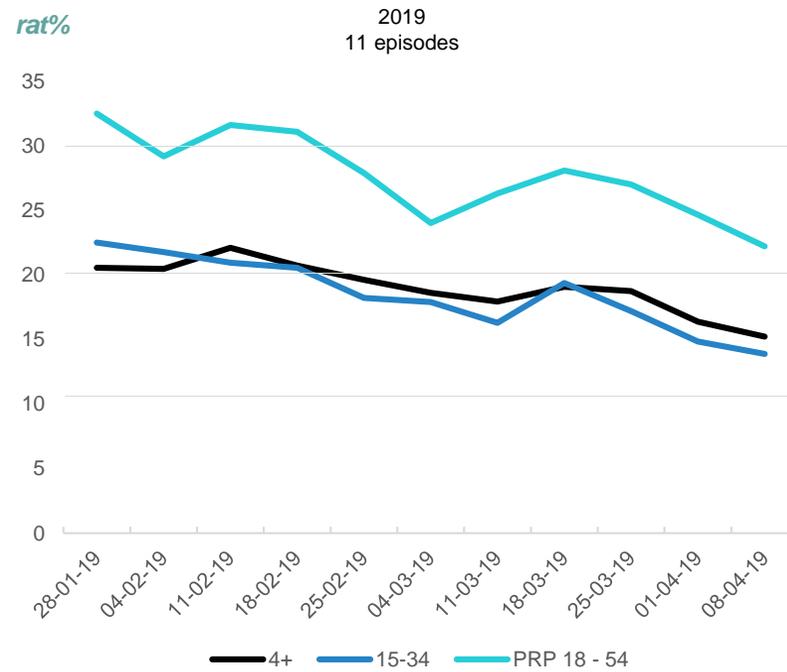
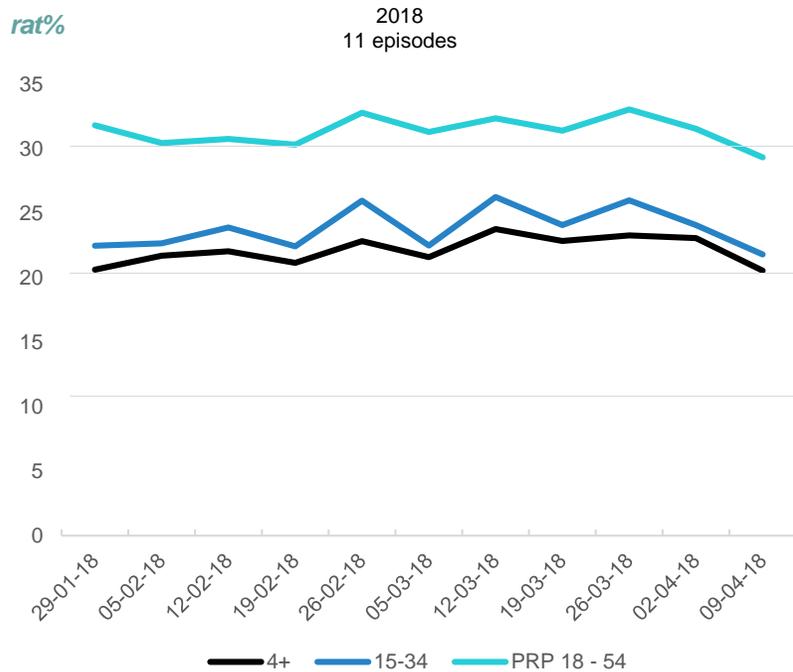


# BLIND GETROUWD **vtm**

## STILL IN THE BOX-OFFICE BUT AFFECTION IS DECLINING



For several years now *Blind Getrouwd* is amongst the TOP Programs in Flanders. Despite this success, the audience ratings are declining: -14% on 4+ target and even -22% on 15-34 between 2019 vs 2018 editions. After a deep dive analysis, we can claim that *Blind Getrouwd* has taken advantage of the first weeks of confinement. *Blind Getrouwd* vs the final of *De Mol*, who will win?

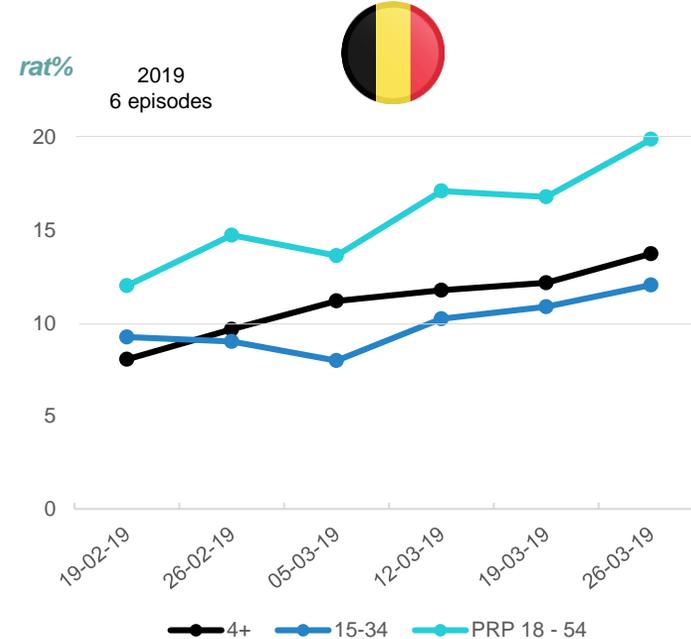
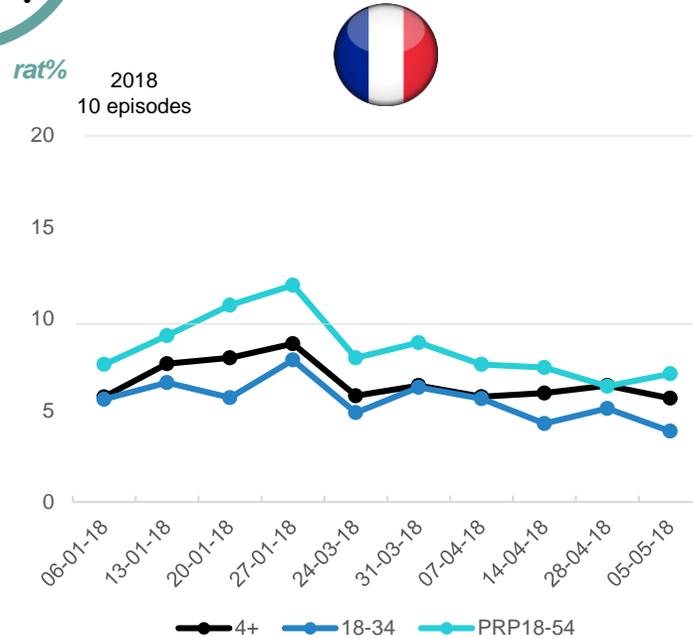




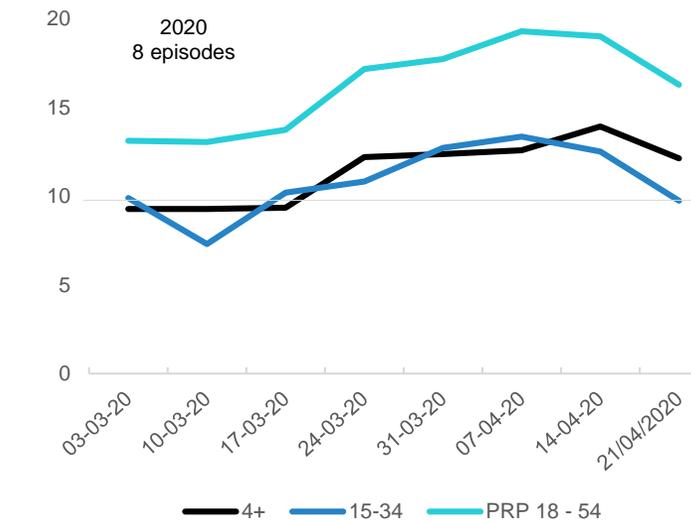
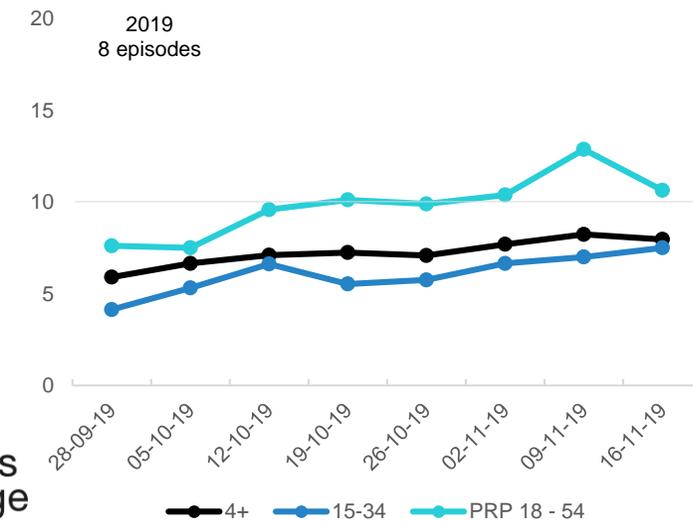
# MARIÉS AU PREMIER REGARD

## THE NEED OF LOVE EXPLAINS THE SUCCESS

RTL TVI



*Mariés au premier regard* is broadcasted on RTL-TVI on two versions: a French one on air on Saturday evening and a Belgian one on Tuesday prime time. Those two differences may explain the ratings differences between the two programs: higher ratings for the Belgian version than for the French one. Belgian versions have an increasing success week after week, maintaining their ratings high.



The current edition has also taken advantage of the confinement period, especially amongst 15-34 where an increase of more than 80% is observed between the lowest rating episode and the highest one. This trend also applies on 4+ and PRP 18-54 targets with an increase of +50%.

Source: Havas Media BE elaboration of Nielsen / GfK data - Live + 7  
(For any programs until 14/4/2020)

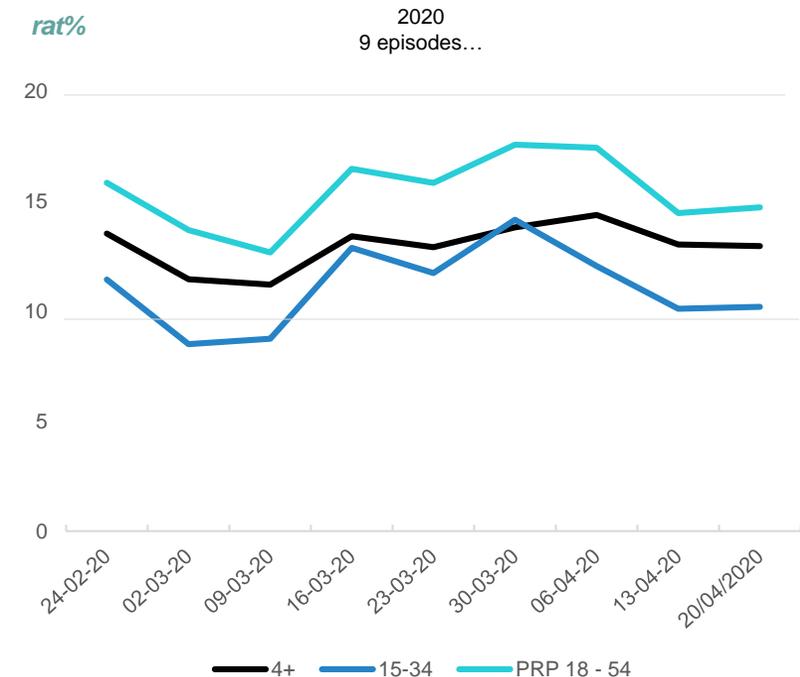
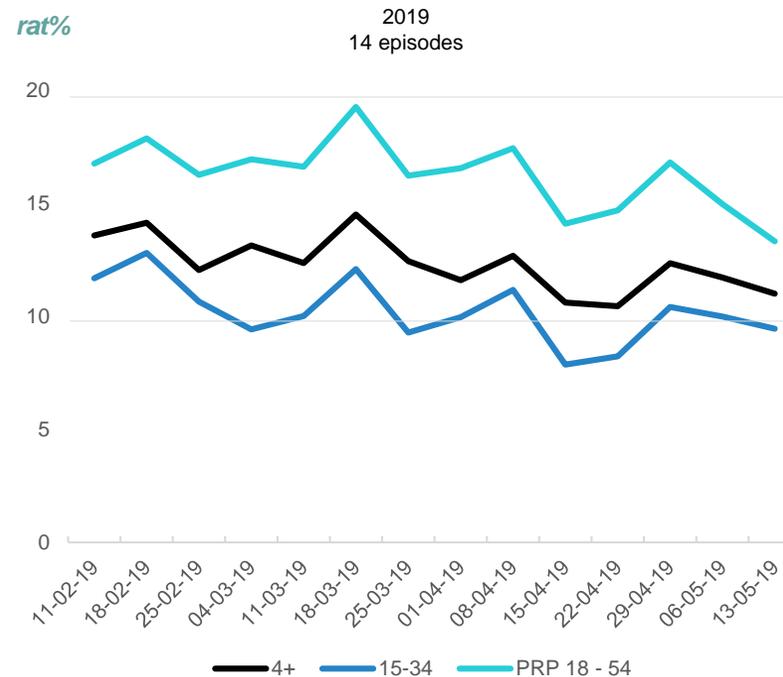
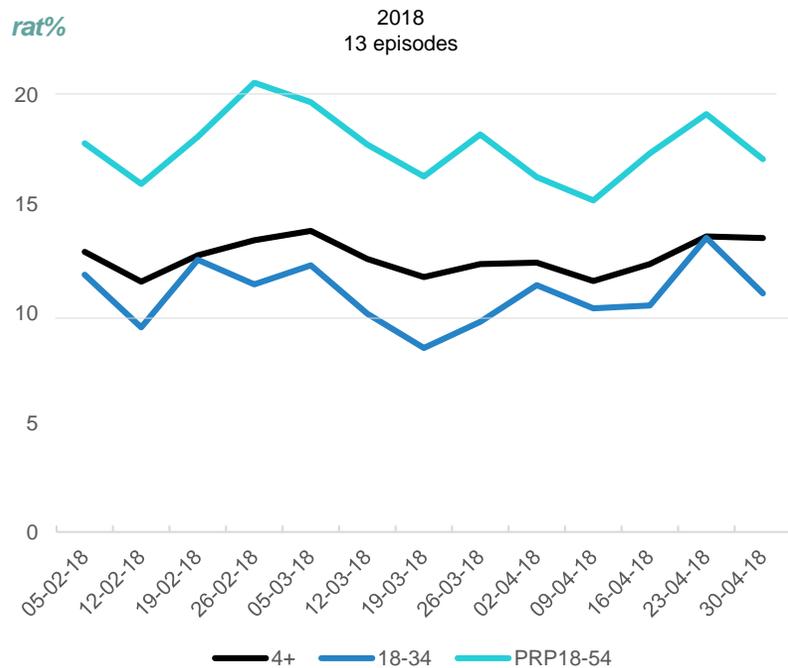


# TOP CHEF **RTL TVI**

## IN NEED OF A KITCHEN REVOLUTION



As *Koh-Lanta*, *Top Chef* is one of those programs French-speaking Belgians are all familiar with. Despite this aspect, we can observe a slow decline on audiences on PRP 18-54 with -13% on average ratings between 2018 and 2020 editions. In contrast, the program is gaining new younger viewers between last year and today (with 8% more of average audiences on 15-34). A similar trend applies on 4+ target. Regarding the current edition, audiences increased after the beginning of confinement period. Is *Top Chef* reminding us the pleasure to cook and keeping the memory of chef's talents in order to prepare the post-confinement?



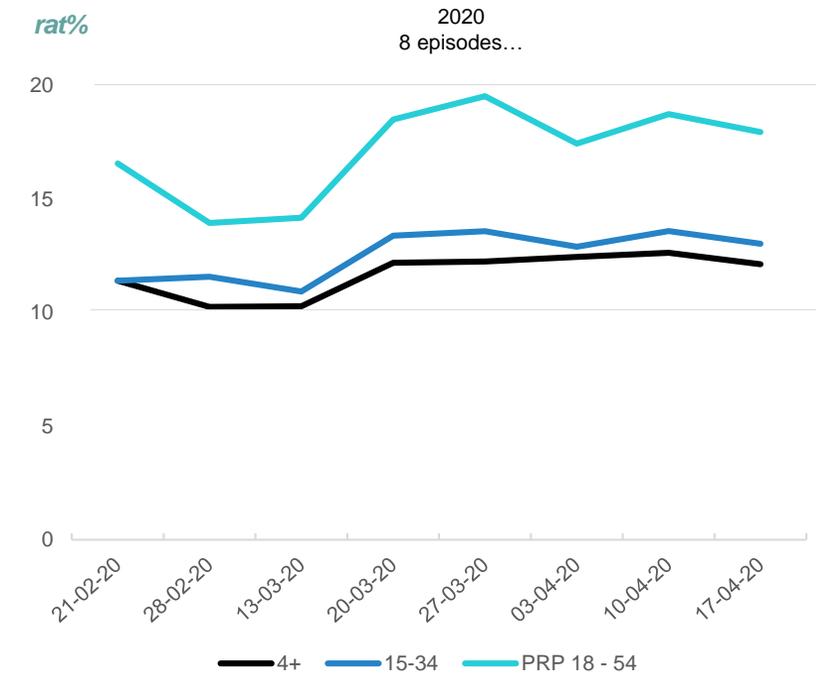
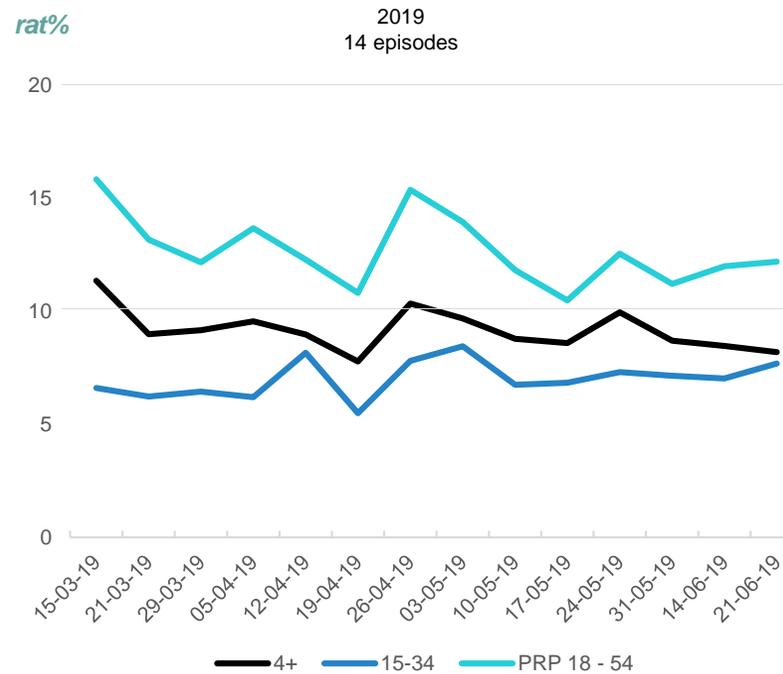
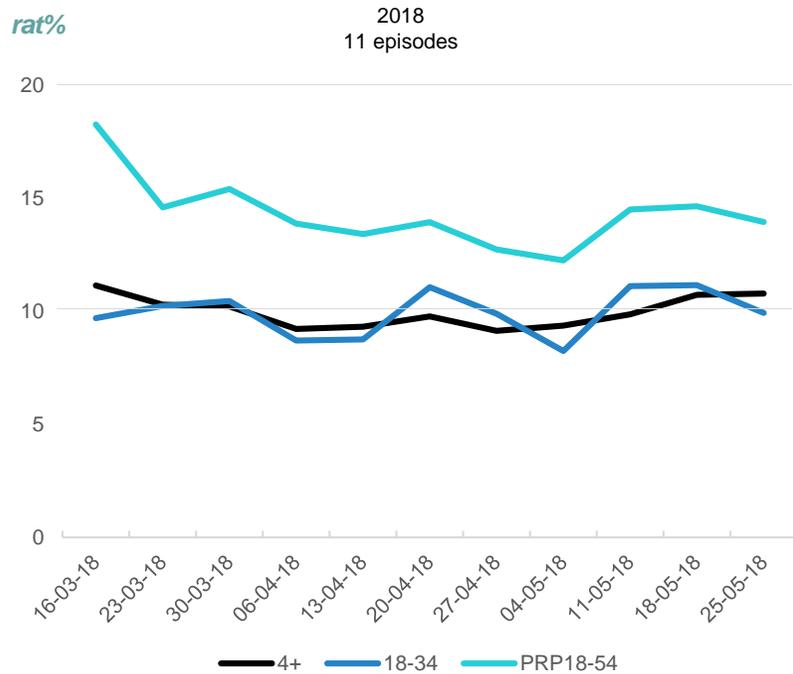


# KOH-LANTA

## A GREAT ESCAPE IN CONFINEMENT



*Koh-Lanta* is the “*Madeleine de Proust*” on air for many years now. The 2020 edition “*L’île des Héros*” achieved an unprecedented success during the confinement period on all targets. Families seem to rediscover the joys of watching a competition taking place in an idyllic island as a temporary escape solution.





# KOH-LANTA

## FOCUS ON 2020 EDITION



Friday, February 28<sup>th</sup>  
episode 2

*OUT: Valérie, 58 y.o.*

ratings #:  
**4+**  
452.651  
**15-34**  
134.541  
**PRP 18-54**  
207.325

Friday, March 20<sup>th</sup>  
episode 4

*OUT: Benoit, 43 y.o.*

ratings #:  
**4+**  
538.685  
**15-34**  
154.703  
**PRP 18-54**  
275.041

Friday, April 3<sup>rd</sup>  
episode 5, part 2

*OUT: Pholien, 29 y.o.  
Delphine, 36 y.o.*

ratings #:  
**4+**  
549.896  
**15-34**  
149.696  
**PRP 18-54**  
259.205

Friday, April 17<sup>th</sup>  
episode 7, part 1

*OUT: /*

ratings #:  
**4+**  
535.703  
**15-34**  
150.598  
**PRP 18-54**  
266.870

Friday, February 21<sup>th</sup>  
episode 1

*OUT: Joseph, 27 y.o.*

ratings #:  
**4+**  
503.578  
**15-34**  
131.569  
**PRP 18-54**  
246.333

Friday, March 13<sup>rd</sup>  
episode 3

*OUT: Teheiura, 41 y.o.*

ratings #:  
**4+**  
454.231  
**15-34**  
126.237  
**PRP 18-54**  
210.786

Friday, March 27<sup>th</sup>  
episode 5, part 1

*OUT: /*

ratings #:  
**4+**  
541.284  
**15-34**  
156.963  
**PRP 18-54**  
290.382

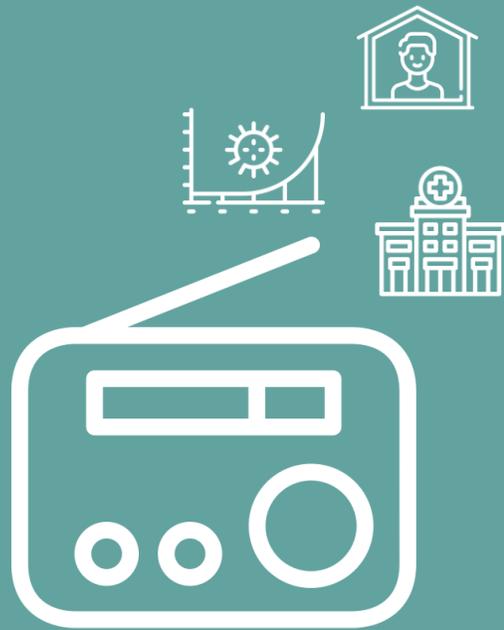
Friday, April 10<sup>th</sup>  
episode 6

*OUT: Ahmad, 30 y.o.*

ratings #:  
**4+**  
558.207  
**15-34**  
158.308  
**PRP 18-54**  
278.614



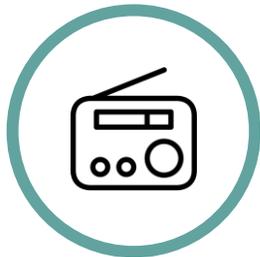
Source: Havas Media BE elaboration of Nielsen / GFK data - Live + 7  
(For any programs until 14/4/2020)



# RADIO

Radio is alive and kicking! No, people not only listen to radio when commuting from home to work...

Radio listeners are attached to their radio stations, not to the radio device. Find some striking evidence about the rise of digital radio stations and streaming services during the actual crisis.



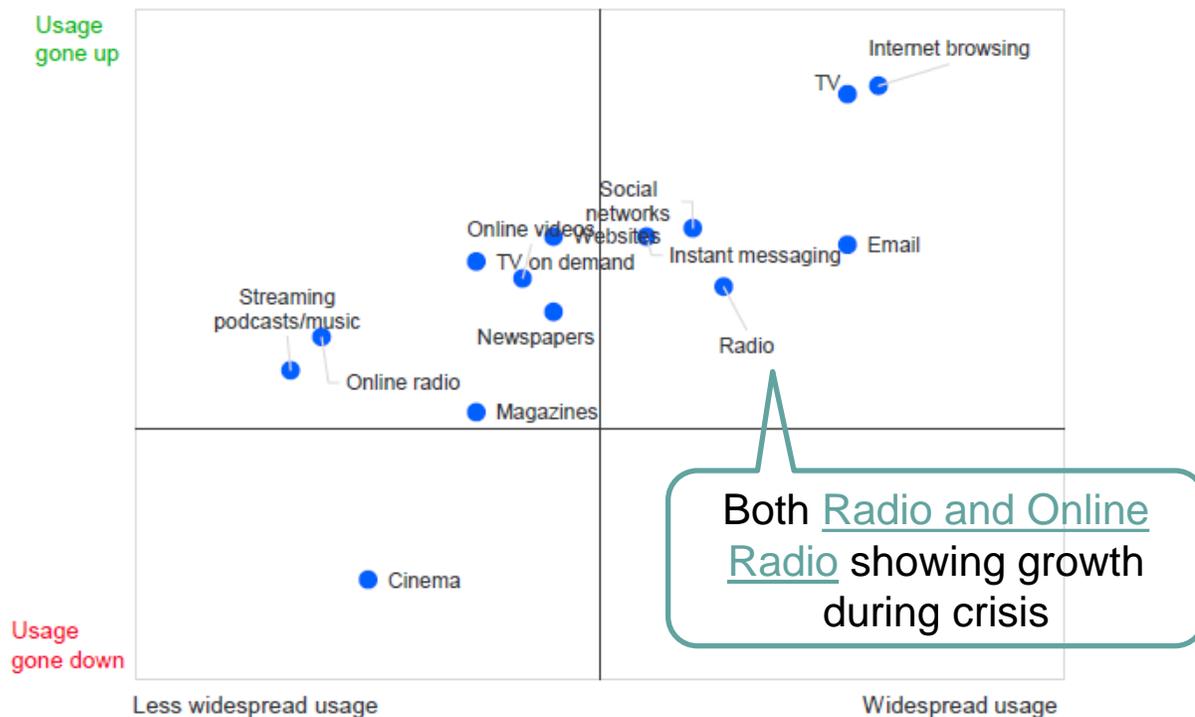
# NOT ONLY TV AND ONLINE ARE ON THE RISE

## 1/4 of the Belgian Dutch speakers are listening MORE to the radio

KANTAR TNS



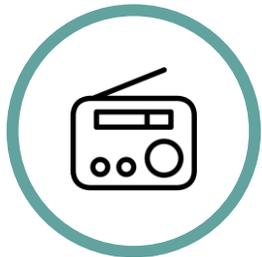
### Claimed Media Usage (past month):



Based on a [qualitative study](#) of 1378 Flemish people on Radio consumption in the North:

- 25% of respondents listen more to Radio compared to before confinement (mostly 15-44)
- 13% of respondents listen less to Radio compared to before confinement (mostly 25-44)
- Classic radio stations remain popular in order to keep informed

**Online Radio Streaming:** +30% increase in stream starts / average listening time / unique visitors on average of the Belgian broadcasters



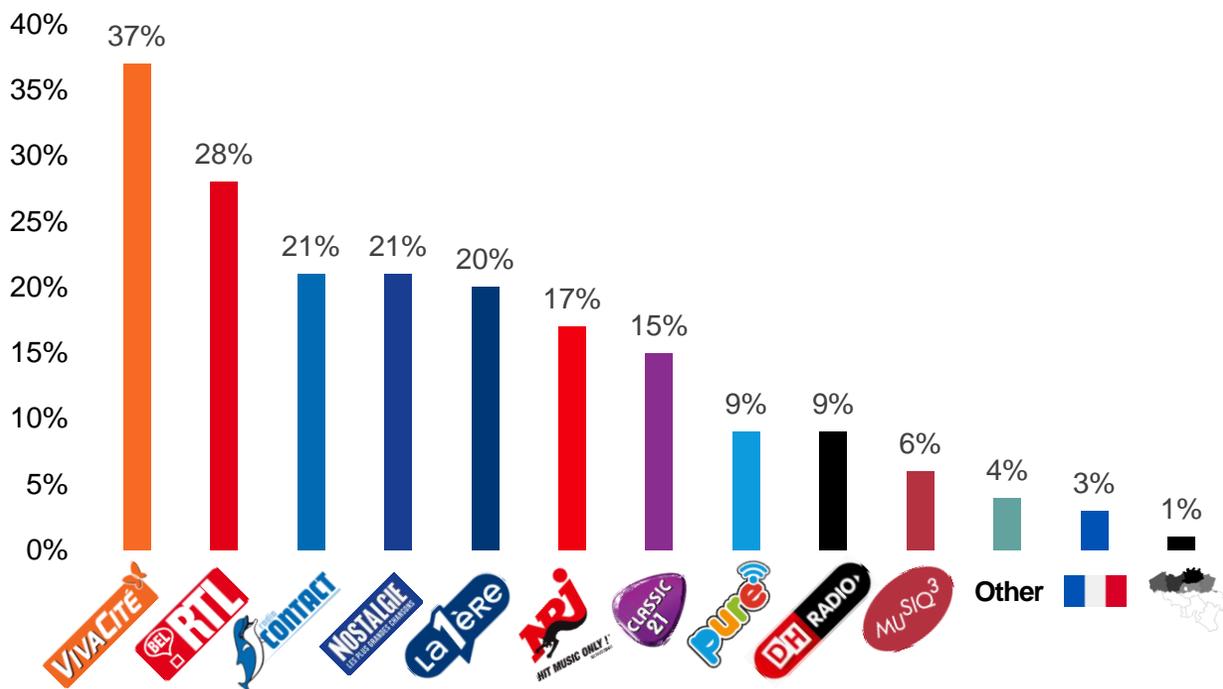
# BELGIANS KEEP LISTENING TO RADIO STATIONS

In the South **Vivacité**, **RTL** and **Radio Contact** come first

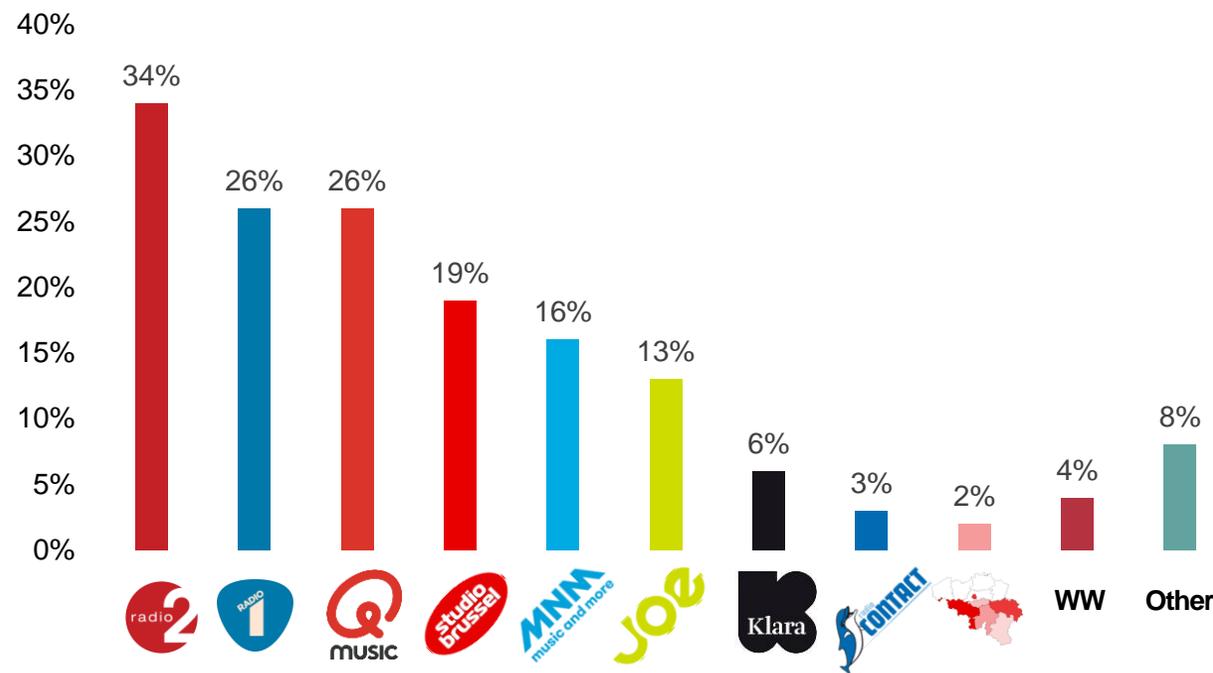
In the North **Radio 2**, **Radio 1** and **Qmusic** are leading

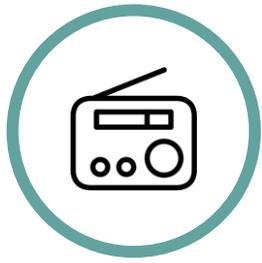


To which radio station do you listen more since the crisis?



To which radio station do you listen more since the crisis?





# ONLINE SOLUTIONS MORE POPULAR THAN EVER

**+40% of radio sessions between 11am and 5pm**



Radio supports multiple roles according to the listeners:



**INFORM** – People want to stay up to date by listening to the news



**CONNECT** – It helps people to stay connected between each other



**ENTERTAIN** – Shows and programs bring life in the house and relax people



- Number of people listening to the radio online (via app or websites) increase by **+36%** since the beginning of the crisis
- Podcasts and programs became more popular for **+23%** of the listeners

## Radio stations see their audiences grow bigger



**+50%** of listeners (last two weeks)



**+32%** of listeners (March)



**+46%** of listeners (last two weeks)



**+22%** of listeners (March)



**+65%** of listeners (March)



# AUDIO STREAMING GAINS POPULARITY

1/4 of the Belgian Dutch speakers are listening MORE to the radio



## LISTENING BRINGS JOY



Listening at home creates new habits

## MOBILE IS STILL FIRST



Smartphones are the main device for audio streaming but can also be used as remote controls

## FAMILY FOCUS

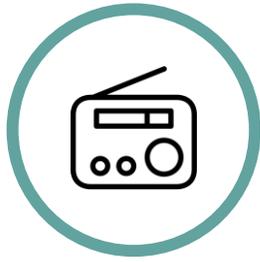


Cocooning is the biggest trend and playlists are now created for domestic tasks and family activities

## REFLECTION – ENTERTAINMENT



Well-being, meditation podcasts gain meaningfulness as well as sport or comedy for entertainment



# MORAL SUPPORT FOR AUDIENCES & LOCAL BUSINESSES

## New initiatives arise and messages are positive and comforting

### LEAVE A MESSAGE

1

People's call will be broadcasted and answered to launch the conversation



Les auditeurs peuvent laisser des messages positifs sur le répondeur de Radio Contact. Les messages seront diffusés en direct dès lundi entre 10h00 et 16h00, et entre 20h00 et minuit.

Radio Contact met à disposition une Feel Good Line. Un répondeur sur lequel les auditeurs peuvent laisser des messages Feel Good. L'objectif de cette initiative est de répandre des idées positives à l'antenne afin d'aider la population dans le confinement. Pour rejoindre la - Feel Good Line -, il suffit de composer le numéro suivant : 02/337.69.30.

Pour toutes questions ou informations, n'hésitez pas à contacter Delphine Van Kerckhove, 02 337 63 16, [dkerckhove@ipb.be](mailto:dkerckhove@ipb.be).

### HEALTH CARE SUPPORT

2

At 8pm, a song from the artist "Soprano" is played in order to show support to the health care worker.



Dans cette période, les radios soutiennent plus que jamais le corps médical.

Plusieurs de nos radios comme Sud Radio, Fun Radio et Radio Contact soutiennent tout le personnel soignant qui a la dure tâche d'être en première ligne pour sauver des vies.

Les radios diffusent chaque soir à 20h, le titre de Soprano - A nos héros du quotidien -. Une manière très positive de se joindre au mouvement !

Plus d'informations sur les programmations de nos radios via Delphine Van Kerckhove, 02 337 63 16, [dkerckhove@ipb.be](mailto:dkerckhove@ipb.be).

**NOSTALGIE**  
WHAT A FEELING!

**NOSTALGIE**  
LES PLUS GRANDES CHANSONS

**SUD**  
RADIO

**BEL** **RTL**

**NRJ**  
HIT MUSIC ONLY!

**fun radio**  
LE SON DANSEFLOOR

"1 uit de 100" allows listeners to choose songs and dedicate them to their close ones.

"La chanson qui fait du bien" – listeners picking up songs & the "good news office" to share positive news

"Partageons le positif" – from 11am to 7pm, people will receive positive vibes on the radio

"Belges à domicile" – tips and tricks to cope with the lockdown situation

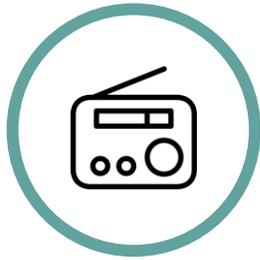
"Hits voor Heroes" allows listeners to choose songs to thank the crisis heroes

"L'e-pero" – gather the speakers, guests and listeners who would like to enjoy a drink together

3

### FINANCIAL SUPPORT

Audiovisual sales houses offer a free 5" audio and video tag-on to invite consumers to consume online. A 10" video campaign supporting local business has also been produced.



# THE CRISIS IS TOUGH BUT THE FUTURE STAYS BRIGHT

## Regional and local radio stations are suffering more when national quickly adapted

### TEMPORARY (DES)ACTIVATION

#### 1 Radio usually broadcasts lots of activation campaigns for in-store traffic

« Pour ce faire, elle ajuste ses programmes, fait travailler les présentateurs depuis leur maison, met en place des actions de solidarité et apporte un soutien aux artistes en faisant la part belle à la musique belge sous le hashtag #playlocal, en diffusant des interviews et même en créant une véritable chaîne numérique et DAB+ comme Joe Best of Belgium. »

« Cette souplesse et cette agilité éditoriales nous permettent en effet de créer très rapidement de nouveaux formats qui répondent plus précisément aux attentes des Belges confinés à leur domicile », conclut Denis Masquellier. C'est aussi ce qu'a mis en place NGroup côté francophone avec NRJ Héros.

Pour mettre en valeur tous ces atouts auprès du grand public, DPG, la VRT et Mediahuis ont d'ailleurs créé un spot commun qui sera montré pour la première fois ce soir sur les chaînes TV flamandes. L'idée ? Sur l'air du célèbre morceau 'Stuck in the Middle with you' montrer les présentateurs de tous les réseaux devant leur micro, à la maison, afin d'illustrer la puissance de la radio et ses 4 millions d'auditeurs, présents via DAB+, sur le radioplayer, les sites web et les applications, au-delà des ondes.

#### Money, money, money

Malheureusement, cette flexibilité tous azimuts ne se reflète pas encore dans les investissements publicitaires. Sandrine Penninckx : « La radio a été la première touchée par la

1/1/www.mm.be/news-fr-45638-la-radio-en-temps-de-crise-l-analyse-des-regies

4/6

### ADAPTABILITY IS KEY

#### 2 New formats, new topics and mood boosters. Radio station answer with creativity and a meaningful purpose.



16 avril 2020  
VIVA FOR LIFE  
Urgence sociale covid-19: CAP et Viva for Life lancent un appel aux dons  
LA WEBRADIO HEROS ACCOMPAGNE LE QUOTIDIEN DU PERSONNEL SOIGNANT

Ces dernières semaines, de nombreuses associations qui accompagnent personnes précaires, jeunes en difficulté et personnes handicapées nous...

#### 3 Radio is a great media to have a quick and effective impact on sales. It is agile, quick and not too expensive.

#### Future's bright ?

« Nous supposons que le marché publicitaire va rebondir lorsqu'on assouplira les mesures et que les magasins pourront rouvrir leurs portes », avance Saskia Schatteman.

« Et nous pensons que la radio pourra jouer un rôle important à cet égard. Les annonceurs savent que notre média est synonyme d'impact rapide. »

« Certains voudront avant tout accroître le trafic vers leurs points de vente pour compenser au plus vite la perte de revenus occasionnée par la crise. Là encore, la radio pourra leur donner un fameux coup de pouce grâce à sa grande capacité de générer du trafic », ajoute la CEO de

1/1/www.mm.be/news-fr-45638-la-radio-en-temps-de-crise-l-analyse-des-regies

5/6

04/2020

Media Marketing | News | La radio en temps de crise : l'analyse des régions

la Var.

Denis Masquellier mise aussi sur la facilité et la réactivité du média, notamment comparé à d'autres : « La radio aura certainement un rôle important à jouer dans la reprise, grâce à son agilité, sa rapidité de mise en oeuvre et ses coûts de production très limités qui lui permettront de saisir la balle au bond. »

Sandrine Penninckx souligne quant à elle l'importance du soutien accordé par l'État : « Pour cette relance, il faudra à tout prix que des aides soient mises en place par les autorités et que celles-ci favorisent les médias locaux et l'économie locale. Ce n'est pas une question de protectionnisme, c'est une question de maintien de santé économique pour le pays. On peut imaginer que chaque pays fera pareil. Ce qui est certain, c'est que c'est tout un secteur économique - la communication au sens large - qui est touché et qu'il y aura sans doute des victimes. »

Cette crise va sans doute aussi modifier à jamais nos habitudes d'écoute. An Caers : « Nous nous attendons à une transition plus rapide vers l'écoute en ligne, maintenant que les gens et surtout les 18-34 sont plus nombreux à avoir découvert cette possibilité. Il s'agit d'une tendance qui devrait se poursuivre après la crise. Les marques locales fortes se sont révélées très pertinentes ces temps-ci et pourraient bien en récolter les fruits une fois tournée la page du coronavirus. » Elle souligne également les possibilités que cette crise a contribué à créer : « Nous avons découvert notre talent créatif et lancé de nombreuses idées de contenus qui remettent en question toute une série de certitudes et ouvrent la voie à des innovations. Outre les nouvelles idées de podcasts et les interactions inédites avec les auditeurs, on constate qu'il n'est pas vraiment indispensable d'être en studio pour faire de la radio. »

# THINK LOCAL!

## Giving visibility to Belgian artists during the crisis

### JOE Best of Belgium

Available on Joe's website/app and via DAB+, this new channel is an answer to the cancellations of festivals and concerts. It focuses on featuring Belgian local artists.

#### Joe ondersteunt #playlocal en lanceert nieuwe radiozender



Concerten zijn afgelast, releases en promo's uitgesteld en de agenda's van artiesten zijn zo goed als leeg. De coronacrisis snijdt diep in de Belgische muziekindustrie en dat is ook Joe niet ontgaan. Om de boodschap #playlocal extra te ondersteunen, lanceert Joe vandaag, woensdag 15 april, de nieuwe zender 'Joe - Best Of Belgium'. Op de nieuwe digitale zender, die via [Joe.be](#), de Joe-app én via DAB+, weerklinken non-stop

*New digital radio to feature the best songs from Belgian artists*

De eerste dag uitzending van de radiozender wordt alvast een extra speciale: de playlist wordt gekozen door heel wat Belgische artiesten. Zo presenteren Bart Peeters, Jan Leyers, Kris Wauters, Walter Grootaers, Guy Swinnen en Joe-dj's Born en Raf Van Brussel elk een uur lang hun favoriete platen.

Benieuwd naar de nieuwe radiozender? Luister dan nu naar 'Joe - Best Of Belgium' via DAB+, [Joe.be](#), de Joe-app of [het Radioplayer-platform](#).

*The channel has been created to compensate the cancellations of all the music events like festivals, concerts, etc.*

# PROVIDE NEW EXPERIENCES

## From audio to video, but still radio

**Qmusic organises a digital DJ set to keep celebrating despite the social distancing**

The event will take place on the 28<sup>th</sup> of April with a 90's theme. The objective is to keep having fun through music but keep respecting the government measures by staying at home... and enjoying some good music.

### Q-Party in Quarantaine



Qmusic organiseert tijdens de quarantainemaatregel...  
quarantaine, elke zaterdag vanaf 21u, met sets van...  
op Qmusic en op Facebook. Herbeleef [hier](#) de eerste

*Digital DJ set via Facebook*



# PARTNERSHIPS ARE BETTER THAN COMPETITION

In these difficult times it is better to be together than apart

**Sales Houses are joining their forces to communicate about the power of radio**

With the name #stuckinthemiddlewithyou, DPG Media, VRT et Mediahuis are launching a joint campaign on TV and Radio to celebrate the power of the radio.

DJs from Qmusic, Joe, Willy, Radio 1, Radio 2, MNM, Studio Brussel, Nostalgie, Klara et NRJ get together to explain how radio is helping more than 4 million Flemish every day during the crisis.

## DPG MEDIA, VRT ET MEDIAHUIS CÉLÈBRENT LE POUVOIR DE LA RADIO

21/04/2020 | redaction



Digital DJ set via Facebook



# THE END

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15/04/20

Brussels