



THE MORALE OF COMMUNICATIONS PROFESSIONALS

A HAVAS / BMMA COLLABORATION

PROFILE

1.

A survey* of
marketing,
communication and
media professionals

2.

Across an equal
proportion of
advertisers, agencies
and media outlets

3.

With managerial
responsibilities, from
head-of to c-level

4.

Within small and
medium-sized
companies as well as
large corporations

* self-administered online questionnaire in French, English and Dutch, hosted from 22/04 to 17/05, 65 respondents

✓ Situation during the crisis

✓ Future of the Belgian economy

✓ Future of my company

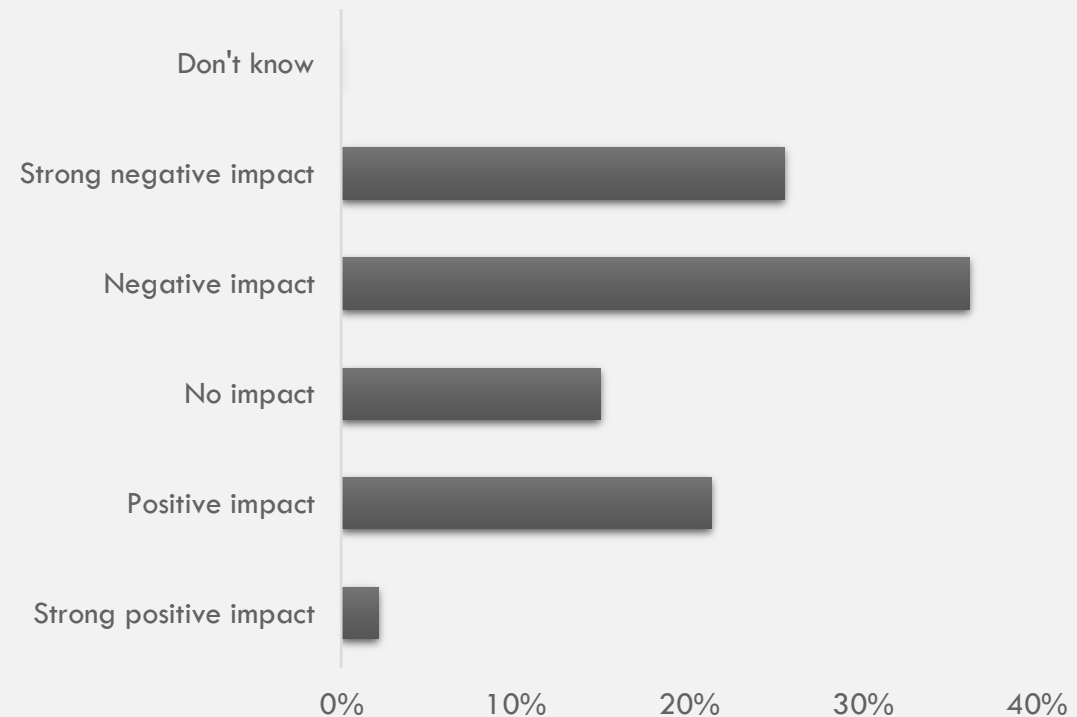
✓ A relationship to rebuild



A mixed reality for companies:

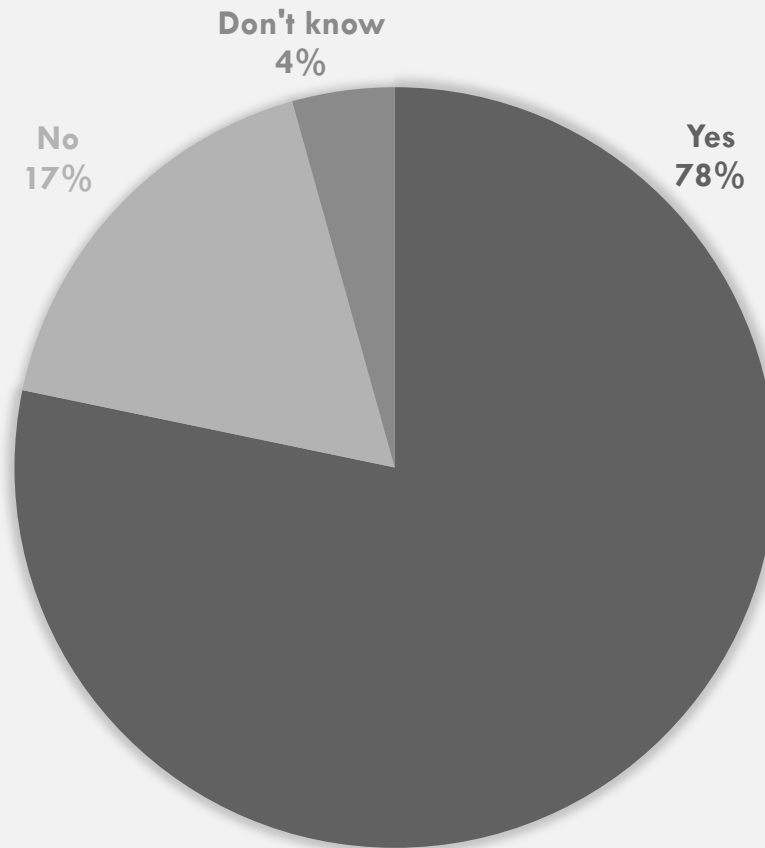
While generally negative (62%), the impact of the health crisis on their activity proved to be positive for nearly one company out of four

Since March 2020 - the beginning of the Covid-19 epidemic - has your company's activity been impacted by the health measures put in place?



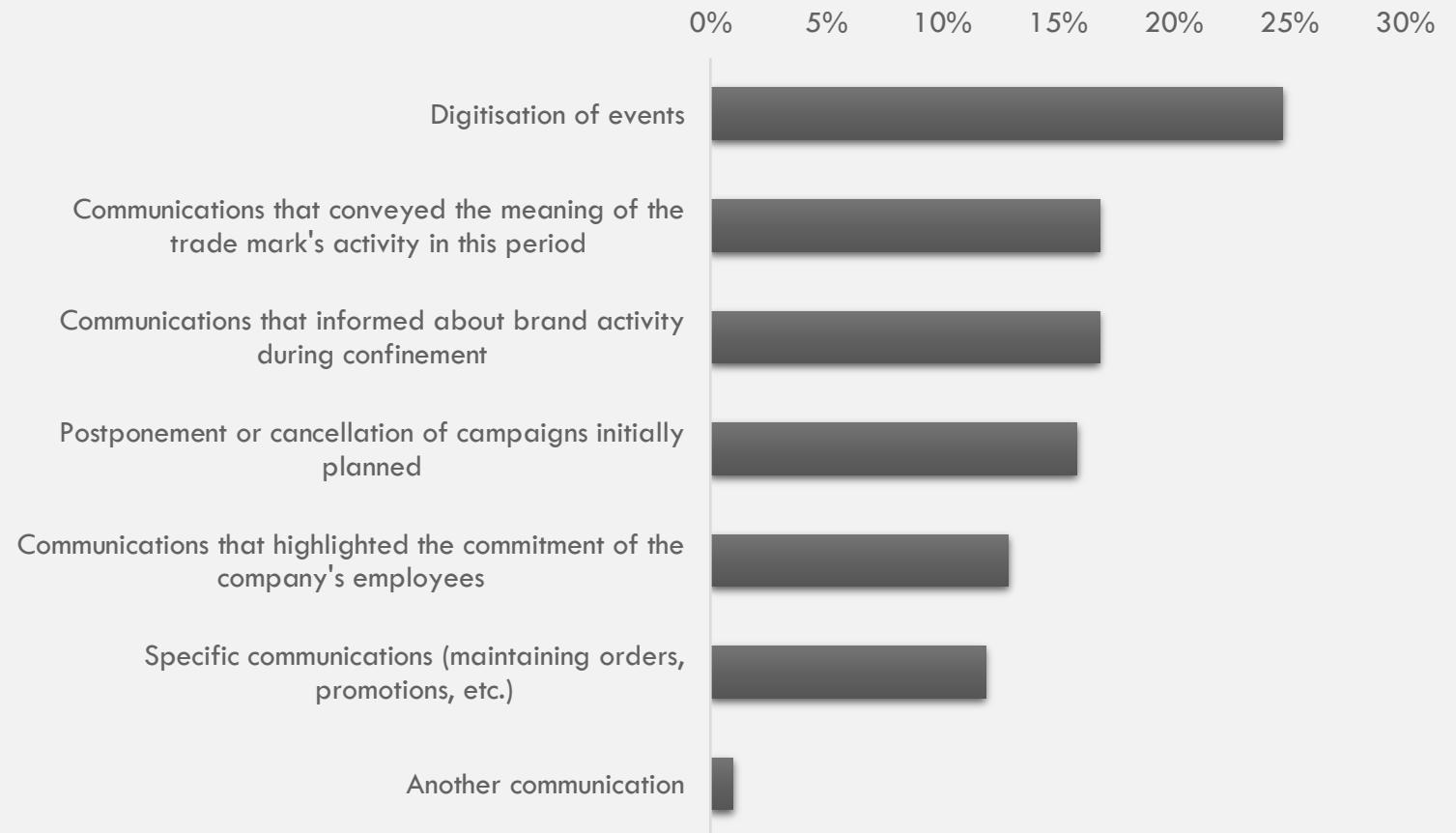
However, the vast majority of companies (80%) have had to adapt their communication actions

Since March 2020, has your company modified its communication activities (speeches, planned campaigns, press communications, social networks, ...)?



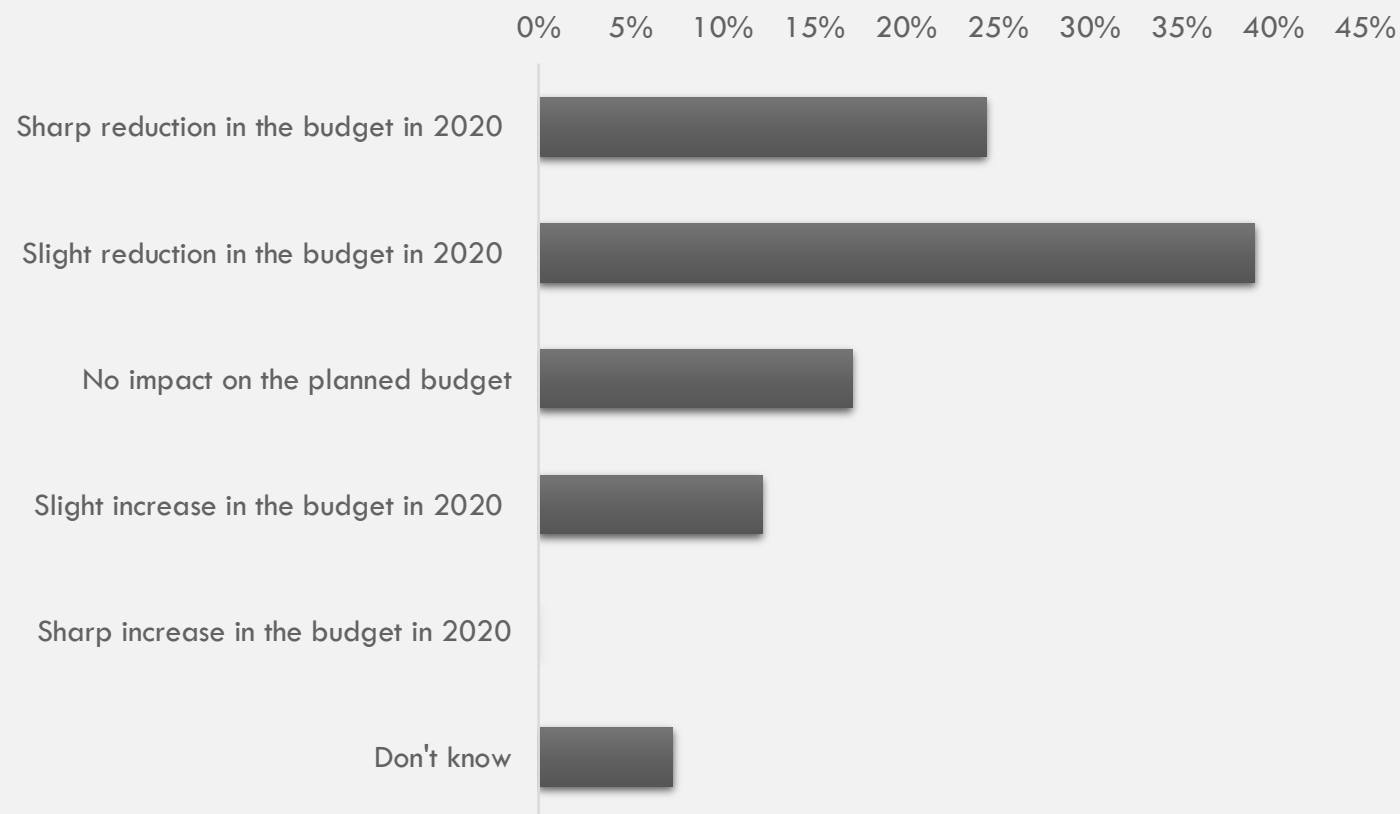
Beyond the postponement of campaigns and the necessary digitalization of events, companies have had to juggle functional communications and societal positioning

How has your brand/company changed its communication?



And to adapt, in 2 cases out of 3, by implementing, on a more or less important scale, a reduction of communication budgets

Since the start of the Covid-19 epidemic in March 2020, what has been the impact on your company's communication budgets in 2020 compared to those planned initially?





Situation during the crisis



Future of the Belgian economy



Future of my company



A relationship to rebuild



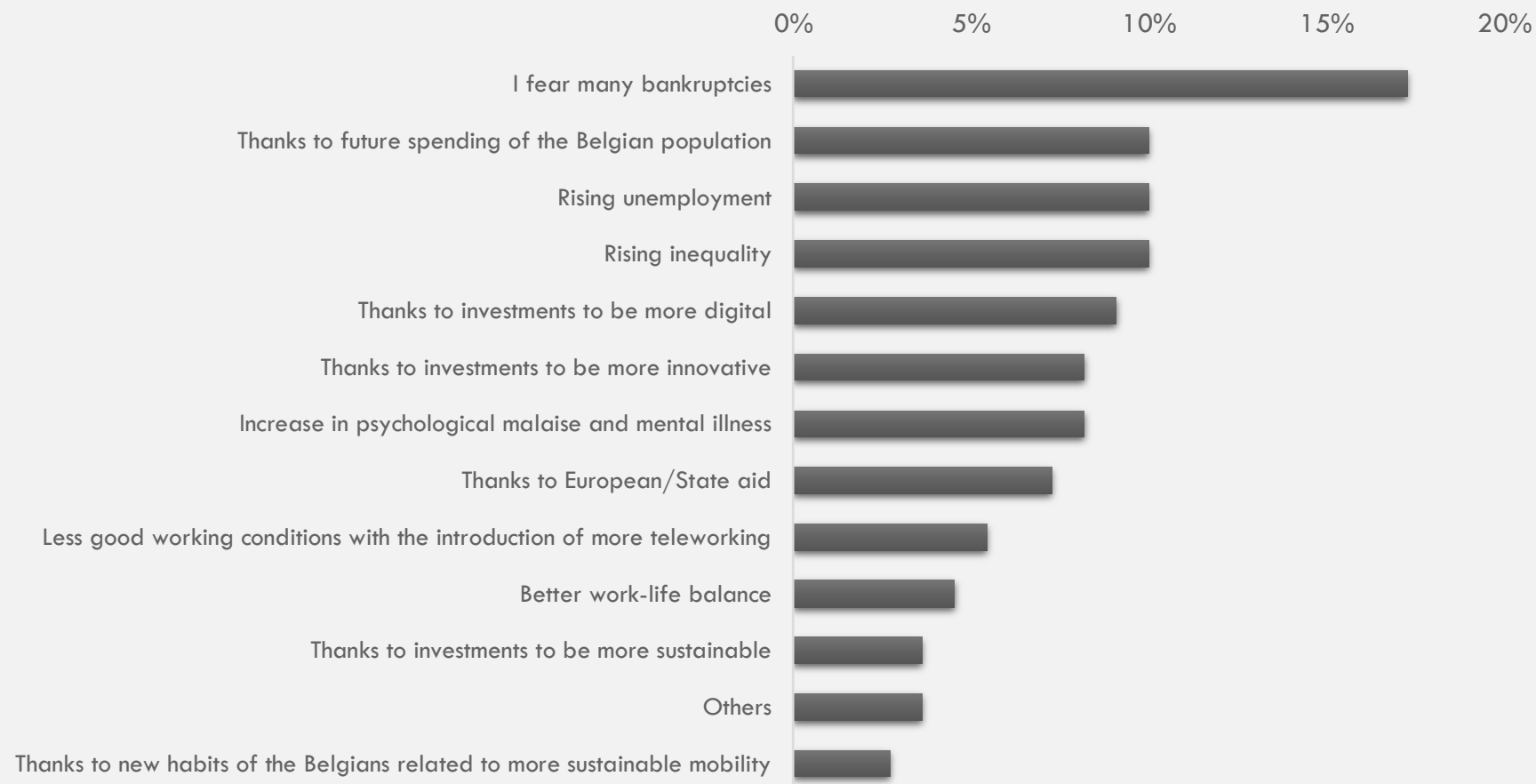
Evaluated on a scale of 1 to 10, the confidence of the sector's professionals in the rapid recovery of economic activity is quite low (5.9) but is based on very contrasting perceptions (ranging from 3 to... 10!)

On a scale of 1 to 10, how confident are you about Belgian economic activity in the coming months?



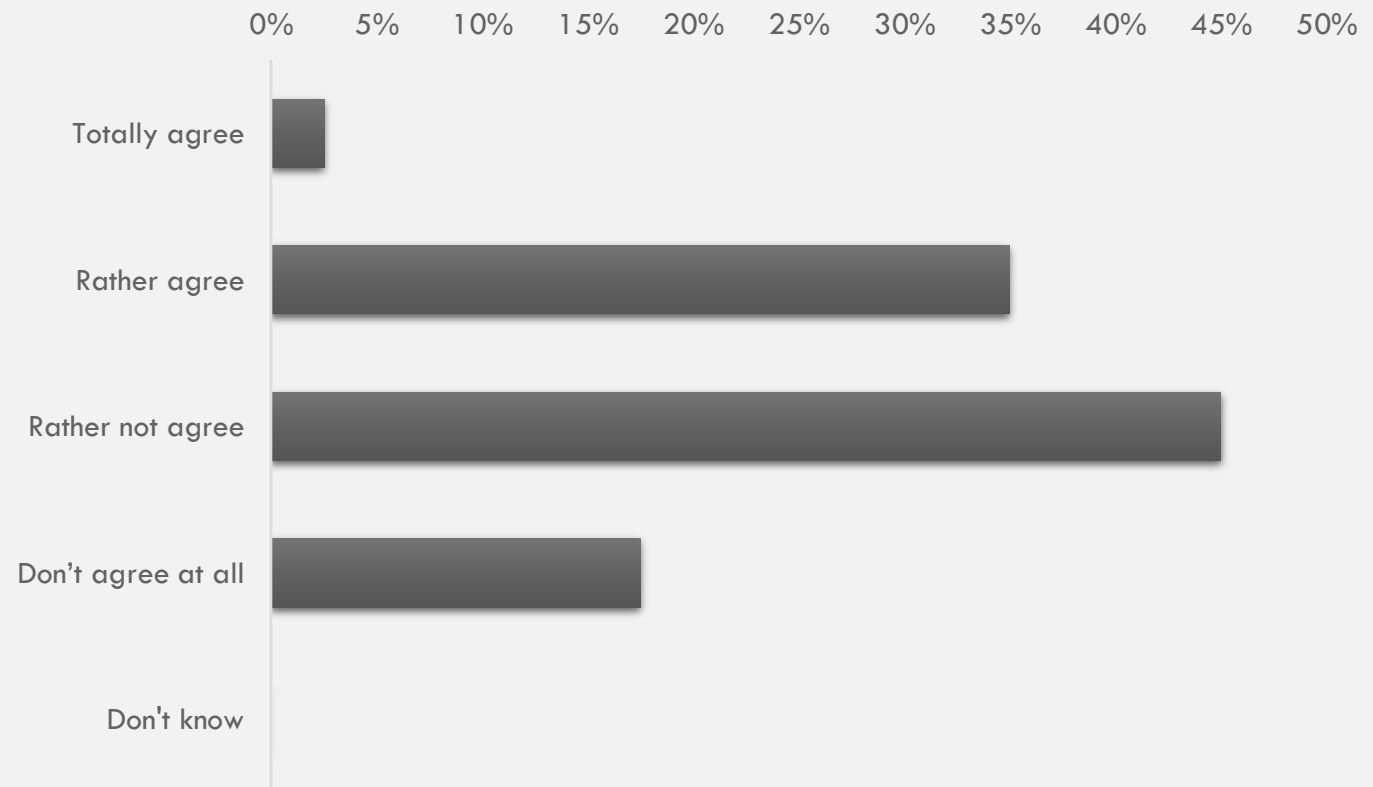
Fears of numerous bankruptcies, rising unemployment and inequality are only partially alleviated by Belgium's deferred consumer spending and companies' investments towards their own transformation

For what reason(s) have you given this score? Select the 3 main reasons



In particular, because these deferred spending and catch-up consumption forecasts are a given to only 40% of those surveyed.

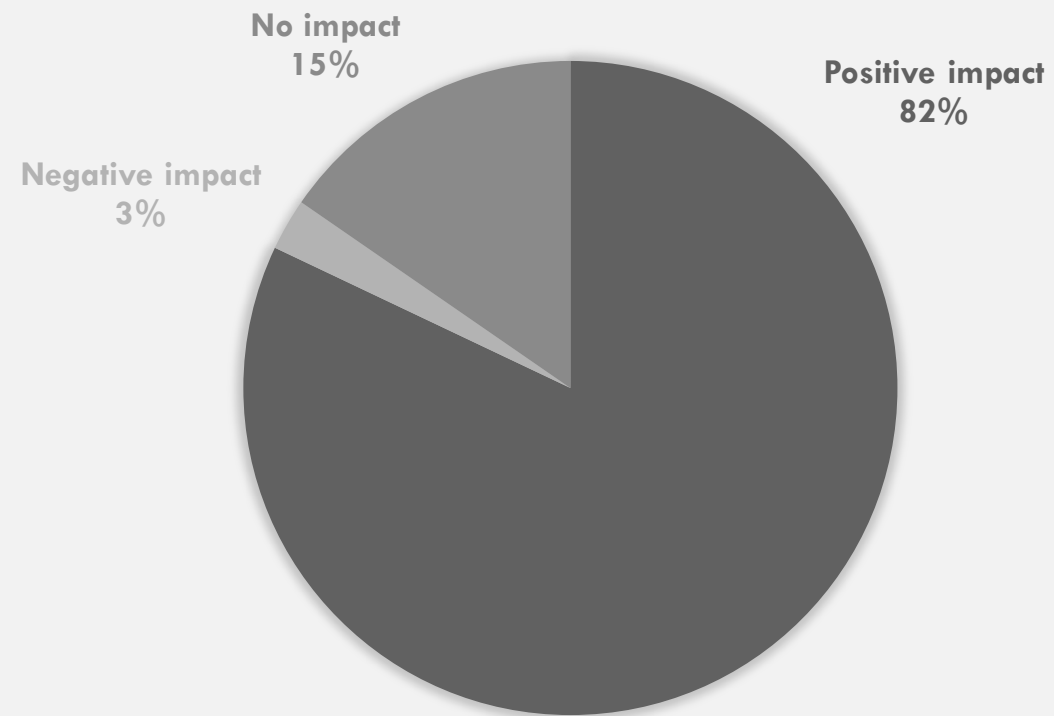
To what extent do you agree with this statement about post Covid-19 era: "Money will roll in and the economy should boom. People will spend the money they've saved during the crisis."



If this study teaches us anything, it is that almost all respondents believe that this crisis will have a positive impact on the willingness of companies to give meaning to their actions

For you, will the current crisis caused by the Covid-19 epidemic have a positive, negative or no impact on...?

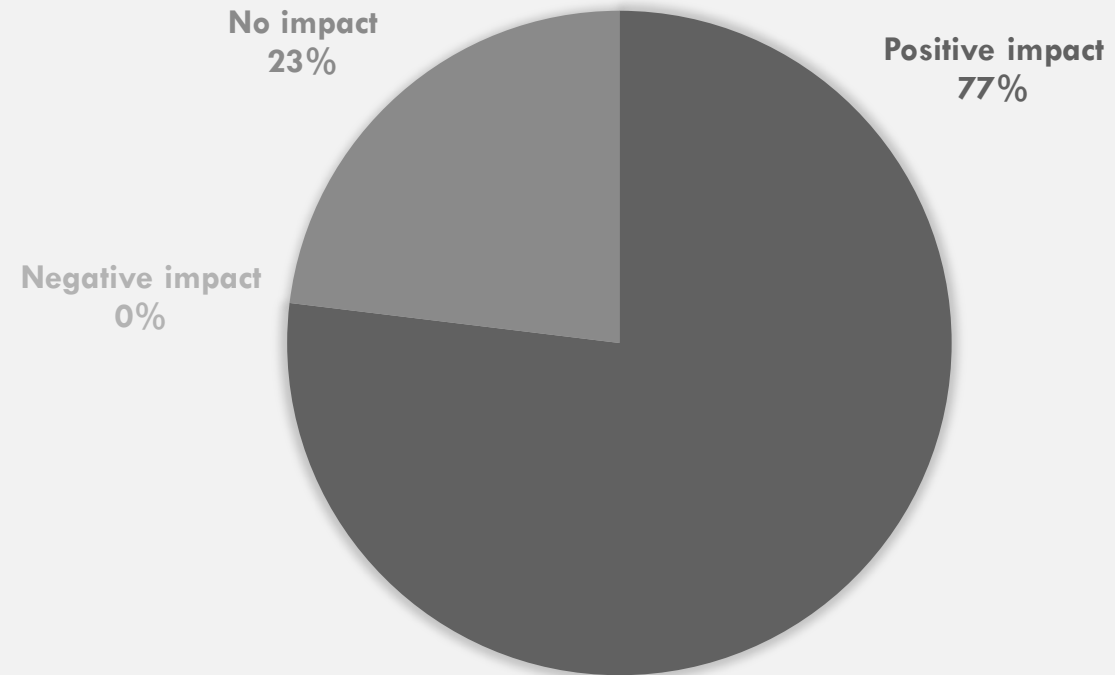
The willingness of brands/companies to give more meaning to their activities



Thus, addressing the impact that this crisis could have had on the attention consumers pay to the meaning delivered by brands

For you, will the current crisis caused by the Covid-19 epidemic have a positive, negative or no impact on...?

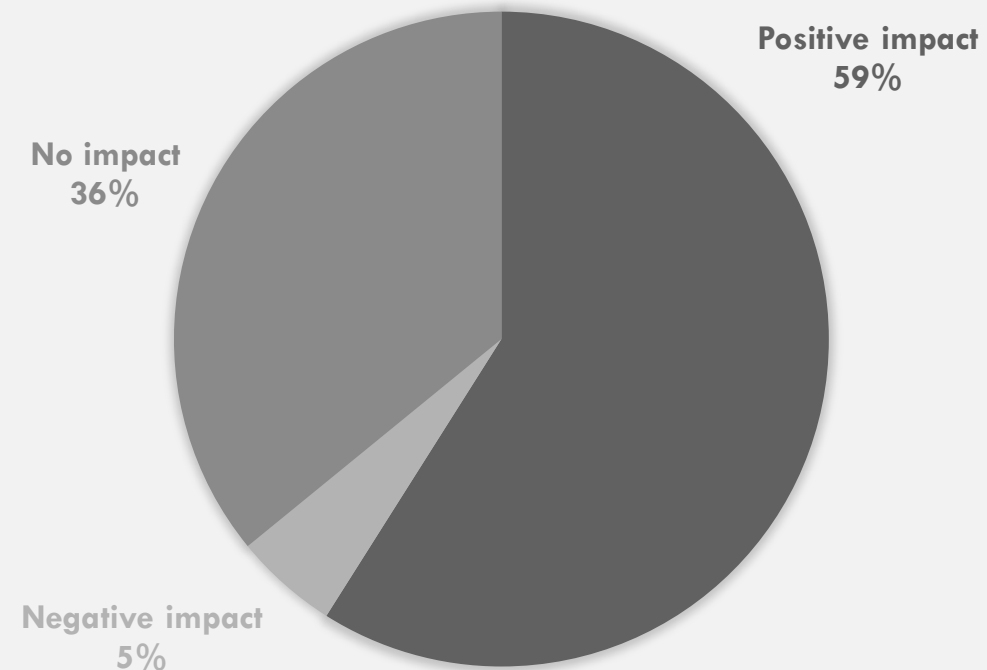
The attention paid by consumers to the meaning of brands/companies



**On the other hand,
industry professionals
have a more polarized
opinion regarding
whether this
willingness of
companies to give
meaning will be better
integrated into the
way brands
communicate (and
act?) in the future**

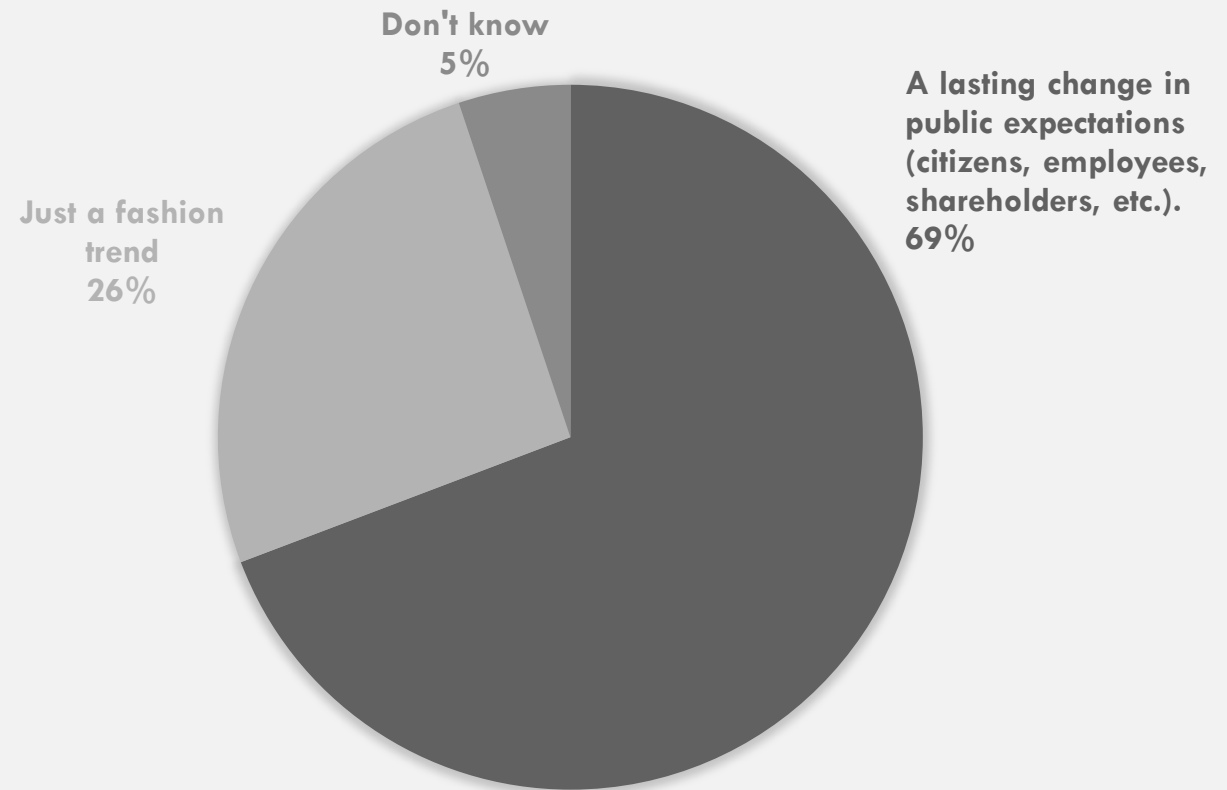
For you, will the current crisis caused by the Covid-19 epidemic have a positive, negative or no impact on...?

How brands/companies communicate



However, the majority (70%) believe that the attention given by companies to meaning is the result of a lasting change in public expectations

From your point of view, is the greater attention paid to the meaning of brands/companies ...?





Situation during the crisis



Future of the Belgian economy



Future of my company

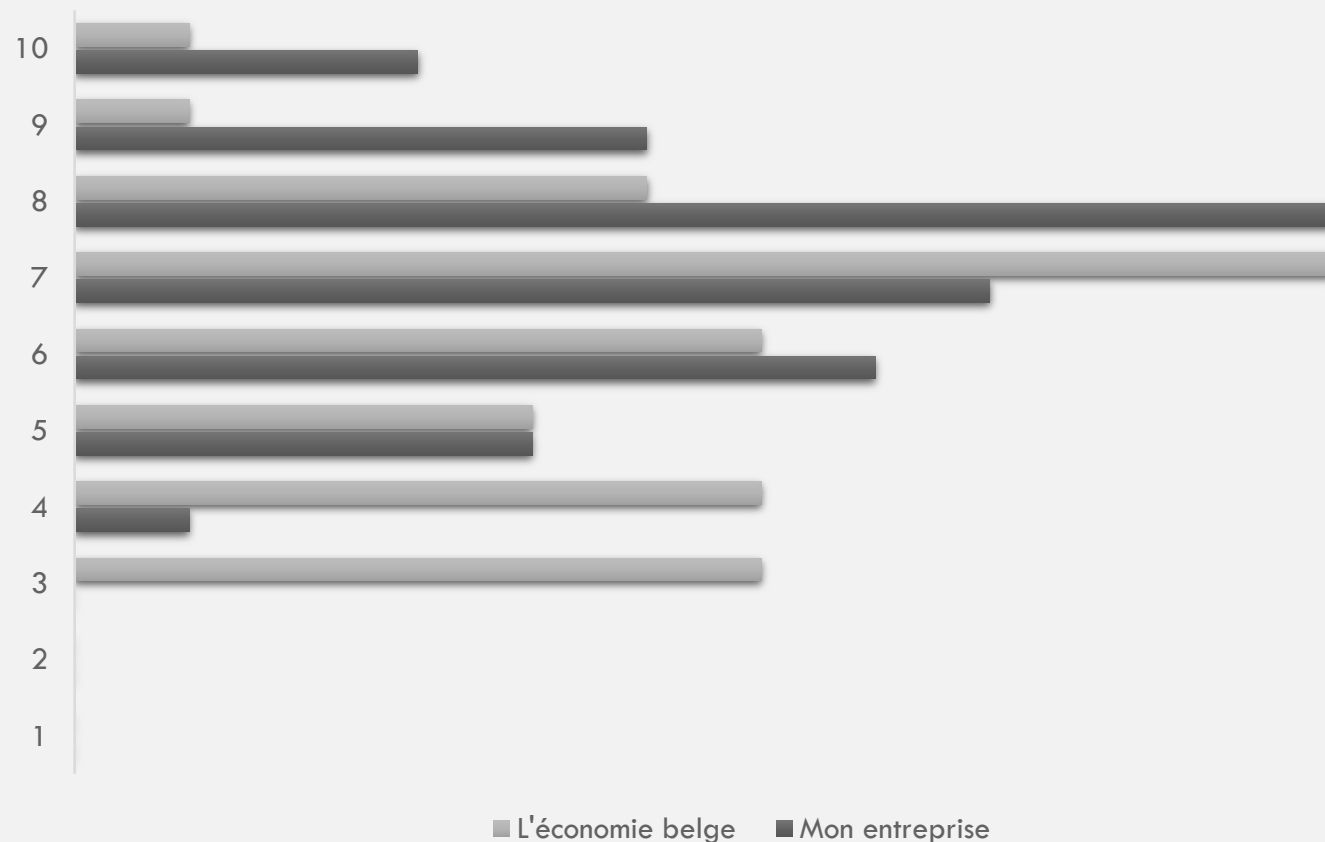


A relationship to rebuild



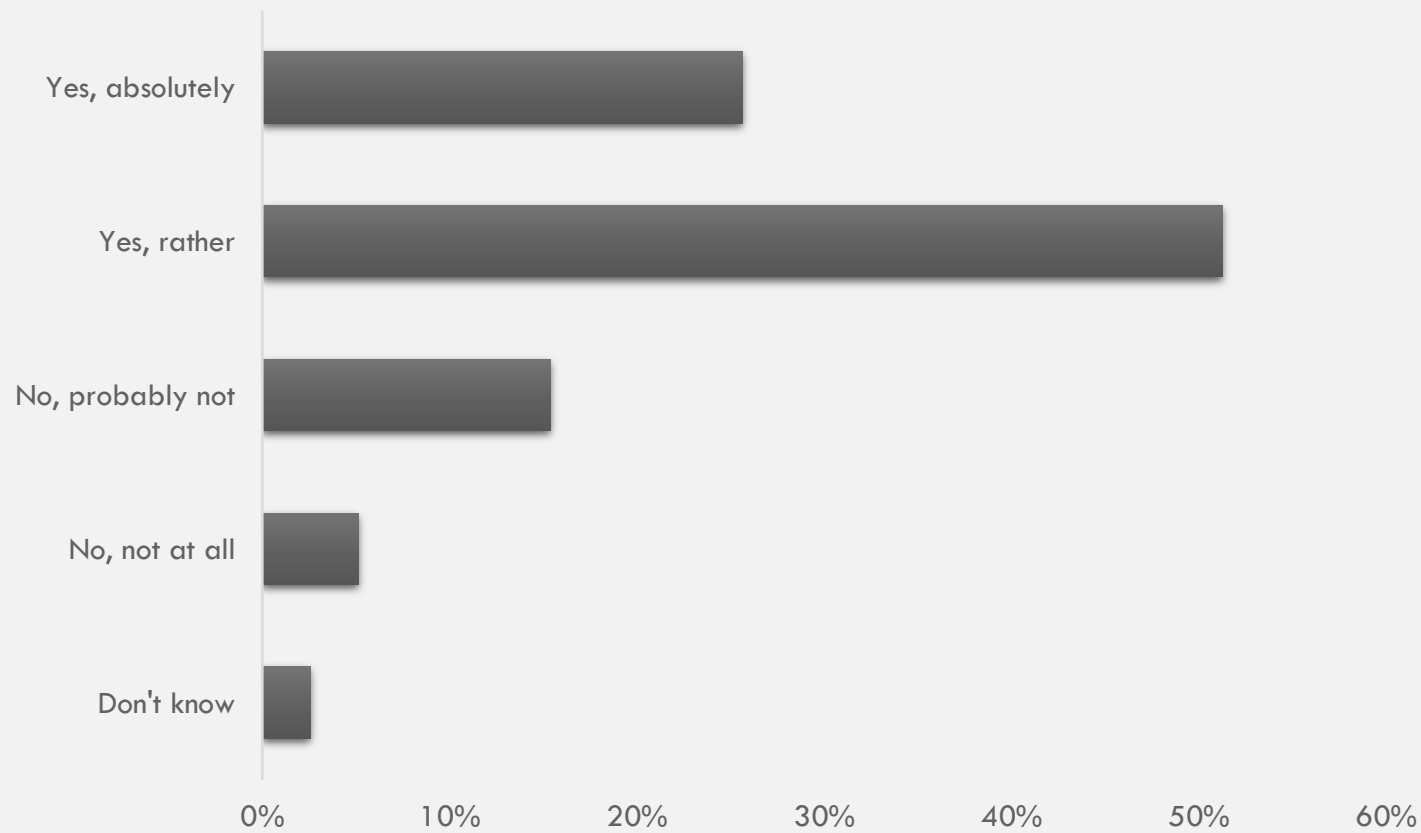
While confidence in the recovery of Belgium's national economic activity is rather low, professionals seem to have a strong optimistic outlook regarding their own business (7.3 on a scale of 1 to 10)

On a scale of 1 to 10, how confident are you about your company's activity in the coming months?



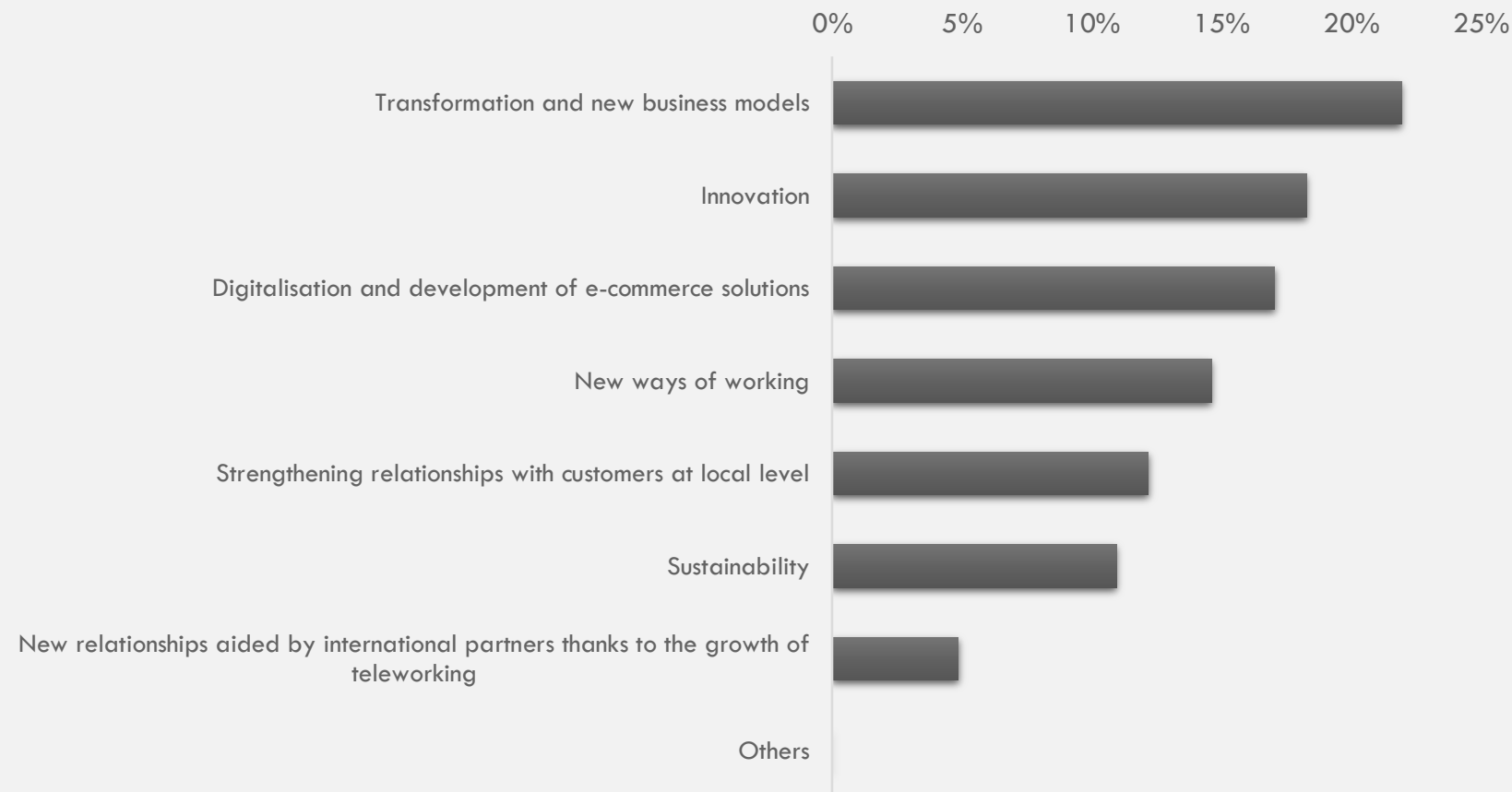
**Furthermore,
respondents consider
in general (77%) that
this upheaval has
brought about
opportunities for
development and
transformation**

In your opinion, is the current period an opportunity for your company to develop and grow?



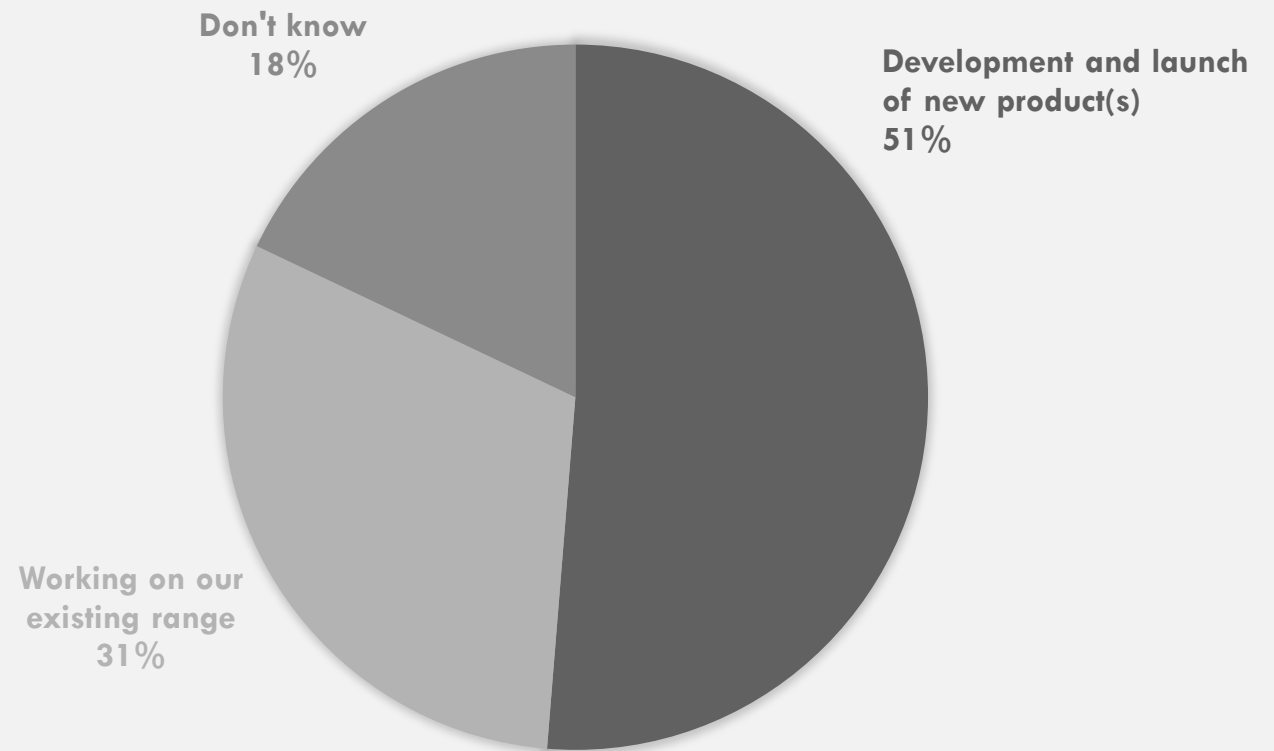
**New business models,
innovation,
development of e-
commerce and new
ways of working drive
the market**

At what level is this an opportunity? (Max. 3 answers)



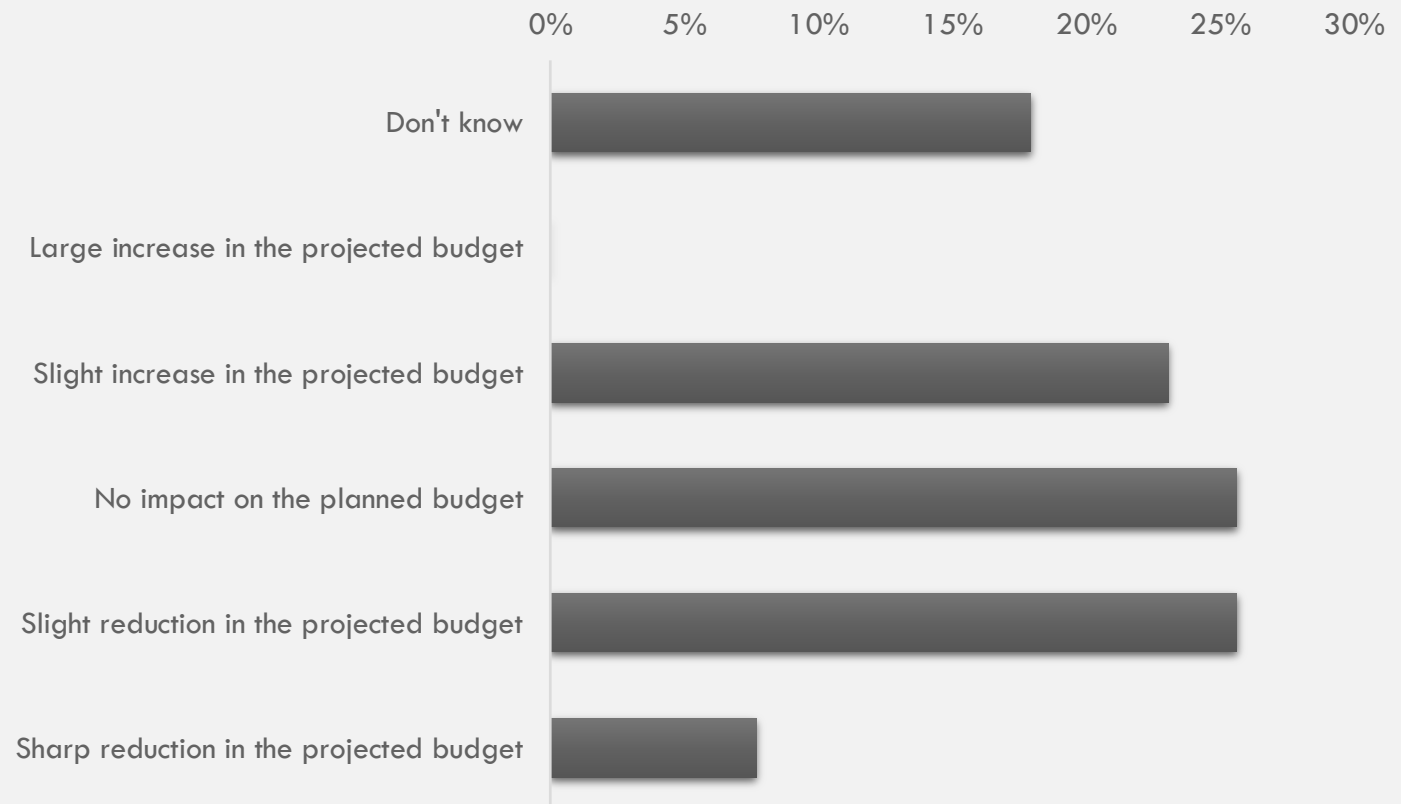
**Who works on the
development and
launch of new
products and services**

Are you working on new product launch(es) or are you looking to strengthen your existing brand(s) and product(s) in the current context?



During this transitional year, in which budgetary caution remains the order of the day

Has the communication budget of your company been reduced or increased for the year 2021 compared to what was originally planned for 2020?





Situation during the crisis



Future of the Belgian economy



Future of my company



A relationship to rebuild



Agility, innovation, empathy, solidarity and courage will be the key words of the relationship to rebuild between partners

What do you expect from your partners (creative agencies - media agencies - professional associations)?

Transparence Simplification Réactivité

Nouveaux business modèles, nouvelles manières de travailler, agilité, flexibilité

Souplesse, compréhension et aucun compromis sur l'expertise

samen sterk

Professionalisme, transparantie, samenwerken in 'open' architectuurmodel

Doorgedreven efficiënte digitale oplossingen rond relevantie en activatie

Snellere digitalisering, constructieve aanpak versus digitalisering. Maatschappelijk engagement (diversiteit, sustainability, ...)

Une solidarité entre l'ensemble des partenaires serait louable

Empathy, purpose and transformation

Etre tjrs plus agile face à de telles situations imprévues qui inévitablement se reproduiront encore

TAKEAWAYS

1.

Although generally negative, the Covid-19 epidemic has had a mixed impact on companies, which have nevertheless adapted their communications with reduced budgets

2.

While the industry professionals are rather uncertain regarding a general recovery, they have great confidence in their respective companies' future

3.

There is an almost unanimous agreement on the positive impact of this crisis in terms of the desire of companies to give more meaning to their actions and the opportunity that this ordeal represents in terms of transformation

4.

New business models, innovation, development of e-commerce and new modes of collaboration are driving the sector today

CONTACT

MATHIAS BEKE, CHIEF INTELLIGENCE OFFICER HAVAS VILLAGE
MATHIAS.BEKE@HAVASMG.COM

