

David Lecouvet
President
Technical Committee Crossmedia





David Lecouvet, Voorzitter

Mediabrand Belgium

Stefan Delaeter

VAR

Linda Scheerlinck

Roularta

Mathilde De Maere

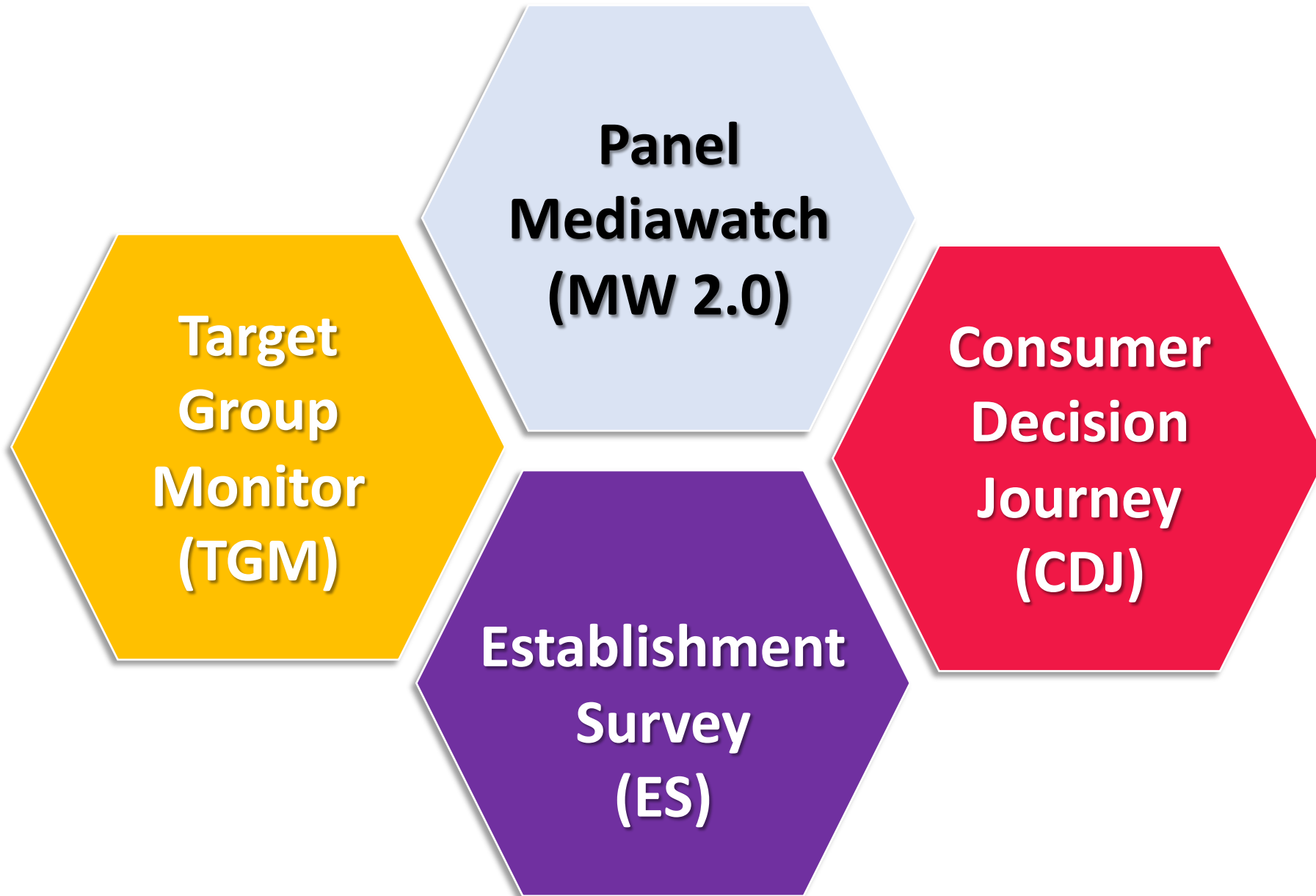
Havas Media Belgium

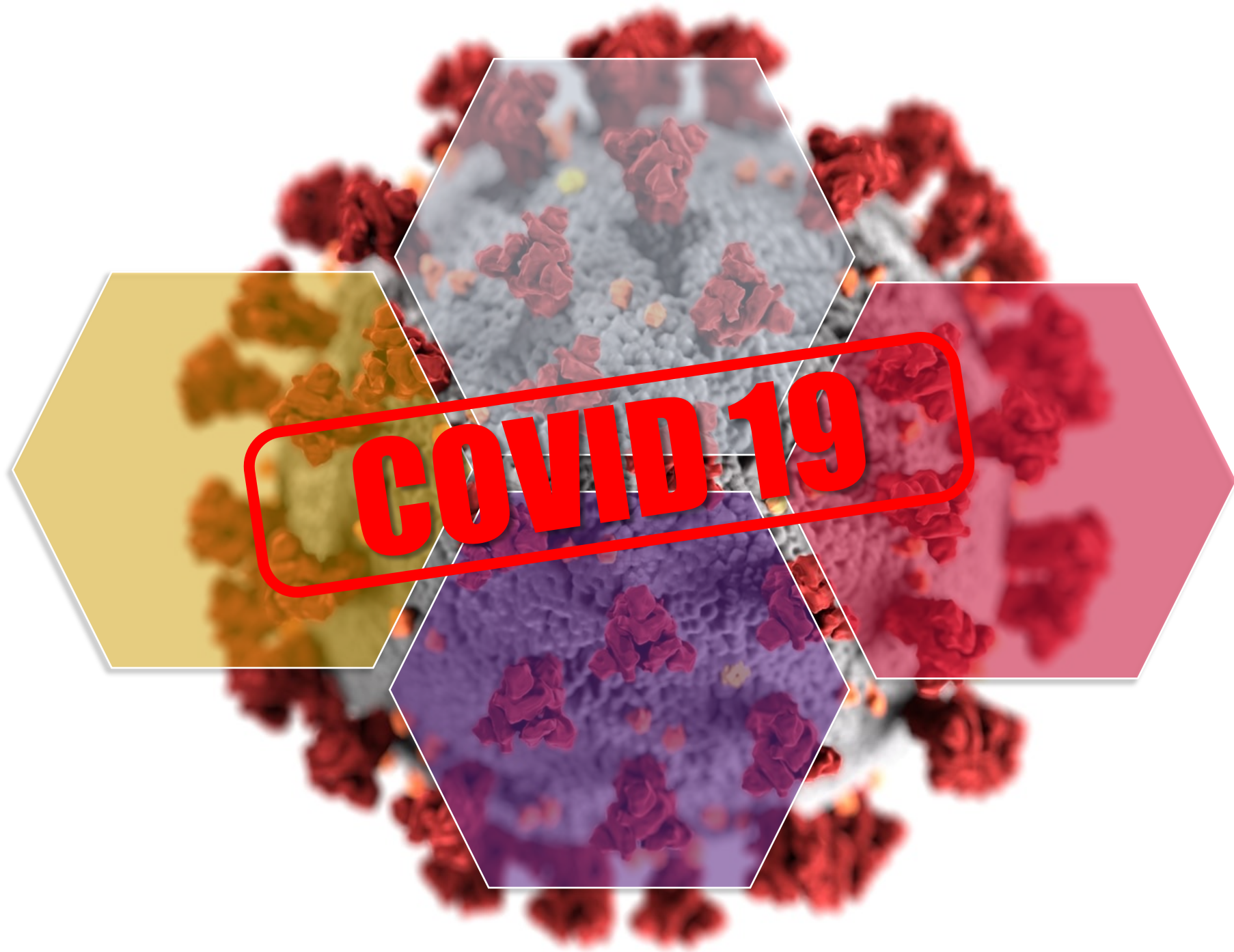
Brigitte Gilson

GroupM Belgium

Sabrina Van Impe

JC Decaux





Major trends in media use

On 5,806 Belgians

PUBLISHED

From Jul 21 to June 22

...about the consumption habits,
lifestyle and equipment

What is the evolution of possession in terms of media equipment? What are the general trends in TV/video, audio and internet consumption?

Establishment Survey

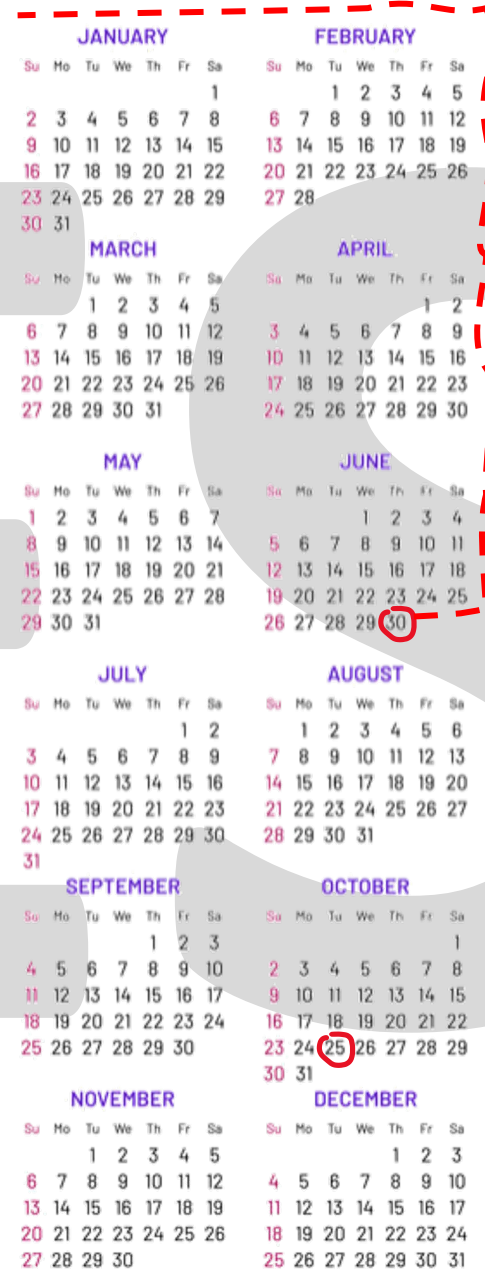
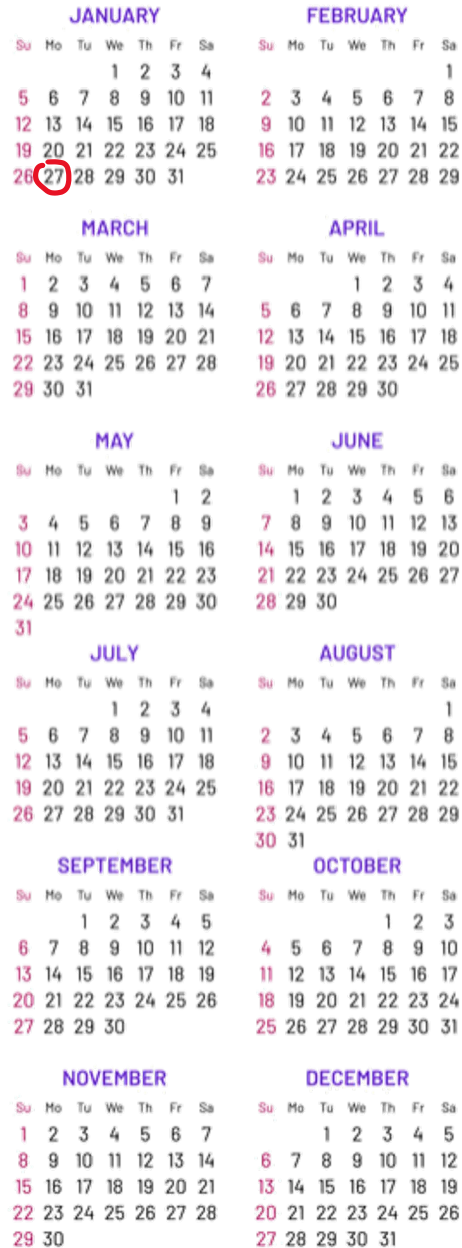
ES

Data from the survey is also combined with government statistics to define the CIM Golden Standard which is used to set benchmarks for other CIM studies : size of the universe, weighting & panel recruitment objectives, etc...

2020

2021

2022



N=5.806

3.214 - F2F

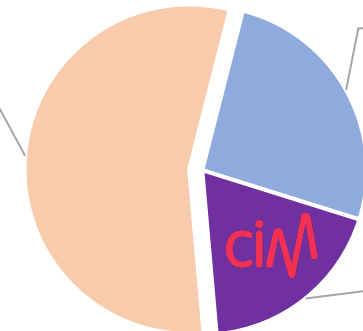
1.502 - CAWI (OAP)

1.090 - CAWI (MW)

**F2F
55%**

**OAP
26%**

**MW
19%**



HABITUDES MEDIA GEWOONTES

Nous allons commencer par quelques questions générales portant sur vos habitudes de ces derniers mois./Laten we beginnen met een paar algemene vragen over uw gewoontes van de laatste maanden.

Kunt u aanduiden over welke toestellen u beschikt in uw gezin + persoonlijk gebruikt? / Quels sont les équipements dont vous disposez dans votre ménage + usage personnel ?

UITRUSTING / EQUIPEMENTS

EQUIPEMENTS TV-UITRUSTING

Nu, een paar meer specifieke vragen over uw TV-uitrusting / quelques questions plus spécifiques sur vos équipements TV.

VERBONDEN TOESTELLEN / APPAREILS CONNECTES

quelques questions sur vos appareils connectés à internet / paar vragen over uw toestellen die met het internet verbonden zijn.

Les questions qui suivent portent sur votre utilisation d'internet / De volgende vragen gaan over uw internet gebruik

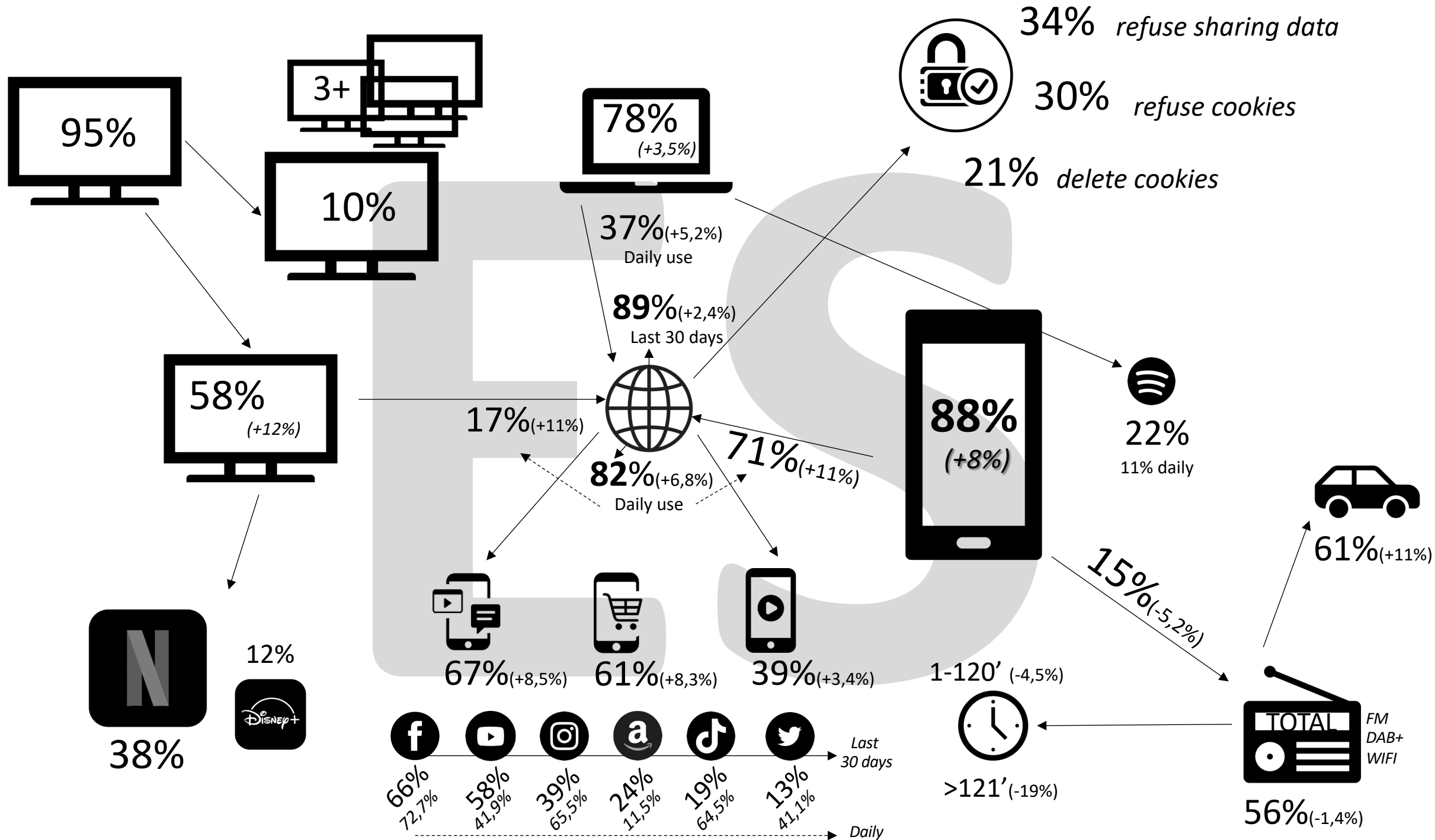
COMPORTEMENTS INTERNETGEDRAG

COMPORTEMENTS TV/VIDEOGEDRAG

Vragen over uw TV en video kijkgedrag / votre comportement de vision TV et video

LUISTERGEDRAG COMPORTEMENTS AUDIO /

De volgende vragen gaan over uw luistergewoontes van de radio en andere audio
Les questions suivantes portent sur votre écoute de la radio et d'autres contenus audio



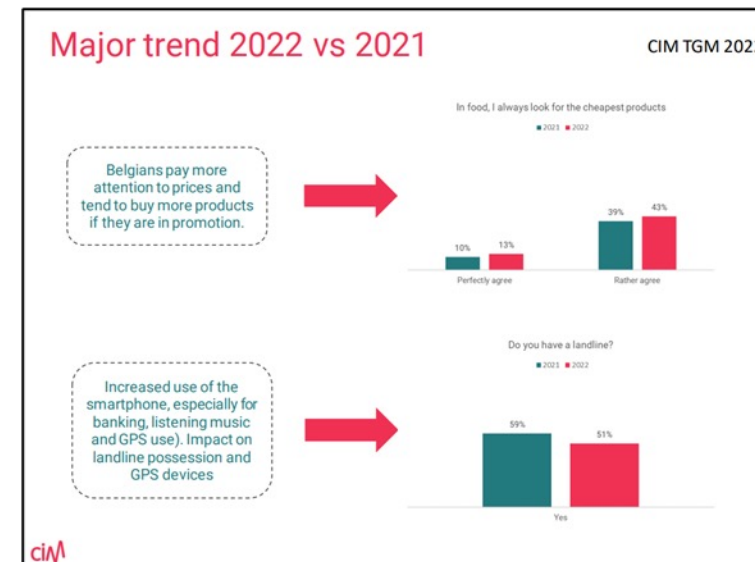
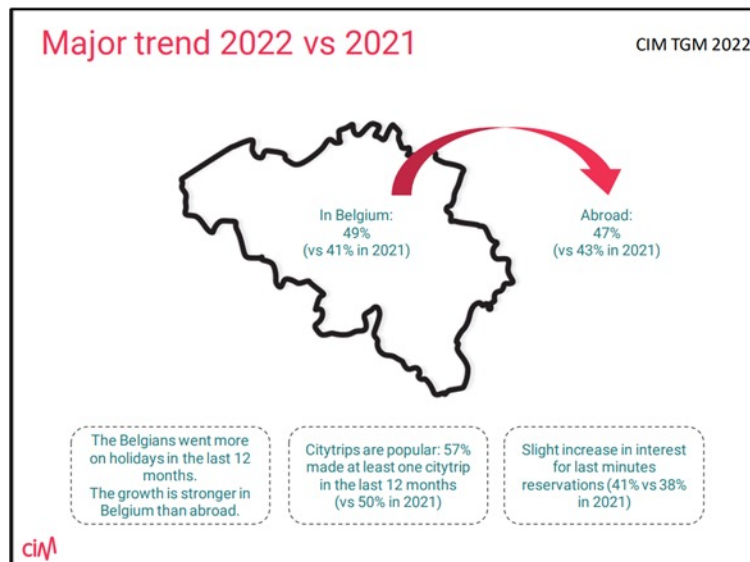
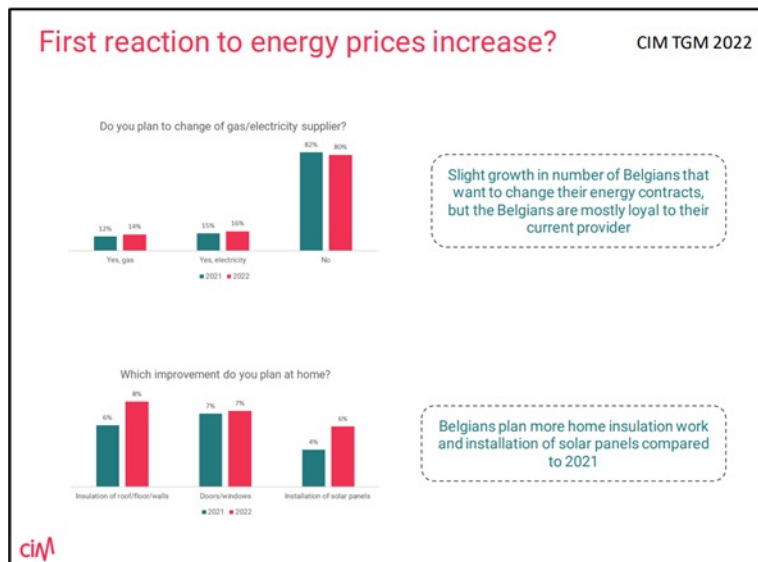
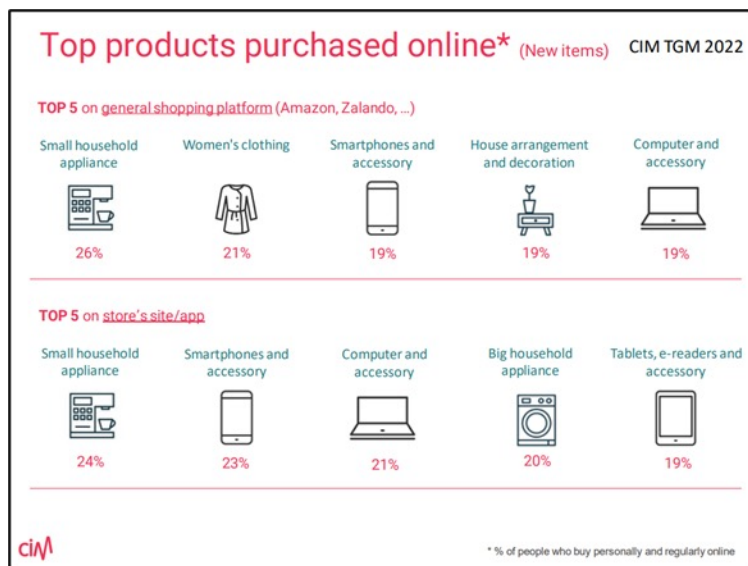
>1,000 questions about purchases
and consumer attitudes...

On 3,944 Belgians

PUBLISHED

From Nov 21 to June 22

...about the consumption habits,
lifestyle and equipment





Via the store's site/app
Online via a general shopping
platform (Amazon, Zalando, ...)



I prefer buying bio products.

40% Perfectly/rather agree

I take into account the scores indicated on
some products (nutri-score, eco-score, ...)



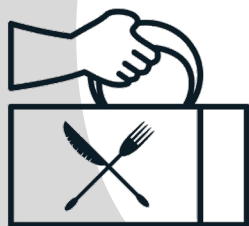
48% Perfectly/rather agree



LACTOSE
FREE

Lactose-free products

71% Never



A self-made meal prepared using a
mealbox bought in a supermarket

74% Never **7%** 1x or more/wk



Home made sparkling
water consumption

73% Never



I am susceptible to messages about
responsible alcohol consumption

67% Perfectly/rather agree



Smoothie consumption

59% Never **8%** 1x or more/wk



I take into account the ecological and biological aspects of cosmetic products

52% Perfectly/rather agree



I utilise cleaning services to maintain my house

19% Perfectly/rather agree



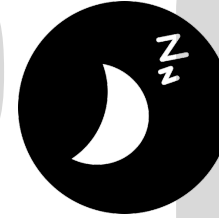
The ease of online shopping

23% very/rather important



via the short chain (at a local producer)

50% Never



Type of purchase means to sleep better

66% No purchase of this type

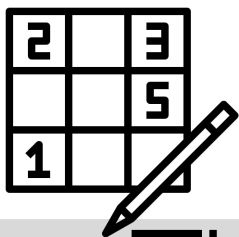


Frequency buying Website supermarket with home delivery

79% Never **9%** 1x or more/month

Frequency buying Website supermarket and and pick up at a point of sale

74% Never **11%** 1x or more/month



Solving crossword puzzles, sudoku
or other similar mind games

27% Never **28%** 1x or more/wk



Lottery, scratch, betting, gambling
online & POS category



Comparison sites and/or reviews

49% Perfectly/rather agree



I think it's important that my bank is innovative
and comes up with new products/services

49% Perfectly/rather agree

I think it's important that my bank
is involved in sustainability

54% Perfectly/rather agree



I find it important that the energy consumption
of my home is as low as possible

92% Perfectly/rather agree



Conduct virtual meetings
(private or professional)

49% conduct virtual meetings



I often read reviews
before making a decision

55% Perfectly/rather agree



I prefer connected devices or ones I can control remotely

18% Perfectly/rather agree



GSM/smartphone & Tablet new items : Reading
news items, Listen to podcast, Use voice assistant
(type Siri, Alexa, ...), Cast to a TV screen



Purchase in internet new items :
Garden items, Games/toys,
Furniture, Decorative items

Add new channels : C8, LN24, Eclips TV, NJAM!, Play 7

Consumer decision journey on
8,139 respondents...

67,575 questionnaires

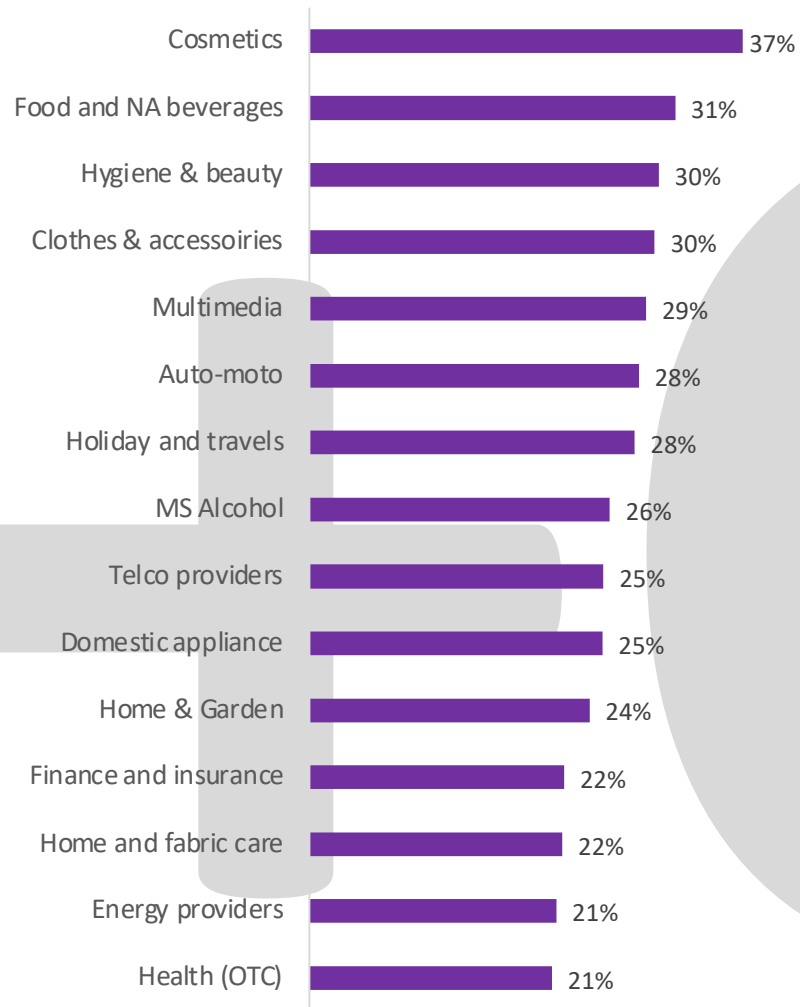
PUBLISHED

From Oct 21 to May 22

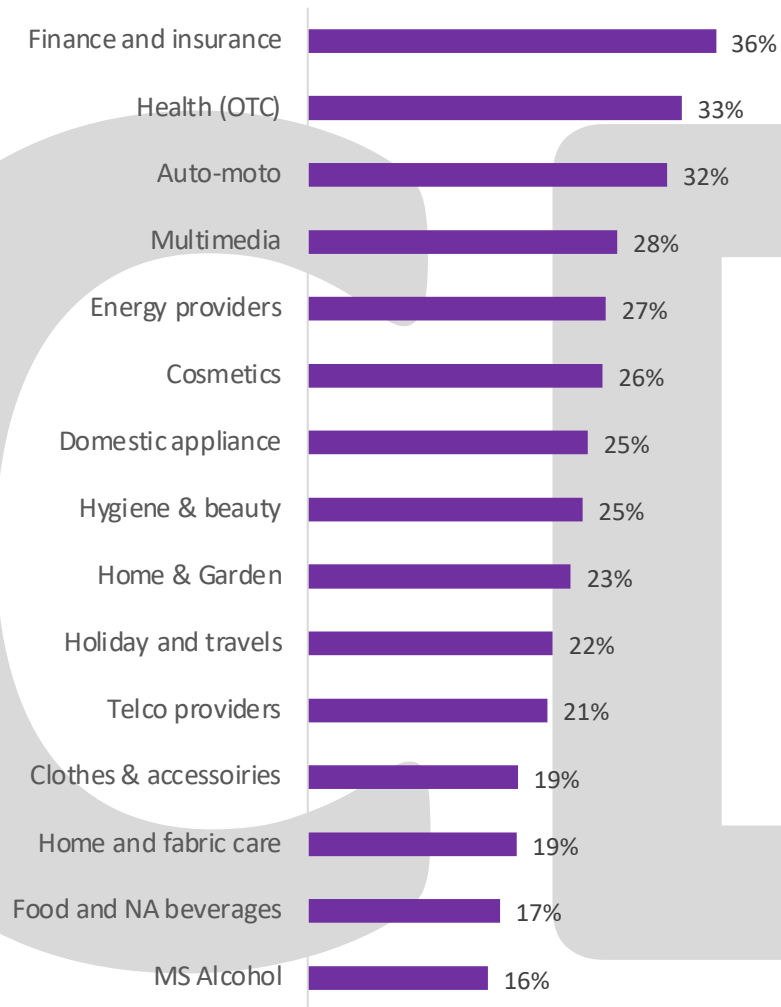
on 15 sectors and 43
touchpoints available

		Food and NA beverages	MS Alcohol	Hygiene & beauty	Cosmetics	Health (OTC)	Home and fabric care	Clothes & accessoiries	Domestic appliance	Multimedia	Auto-moto	Holiday and travels	Finance and insurance	Telco providers	Energy providers	Home & Garden
Adv. email		35%	22%	35%	43%	28%	25%	41%	30%	32%	34%	36%	35%	33%	33%	29%
Adv. In dailies		36%	31%	32%	32%	24%	30%	30%	30%	30%	36%	26%	27%	24%	23%	32%
Adv. In freesheet		48%	38%	40%	39%	27%	37%	35%	39%	37%	39%	27%	27%	28%	24%	40%
Adv. In magazines		36%	33%	34%	37%	25%	31%	31%	30%	30%	35%	26%	26%	25%	22%	32%
Adv. on social media		31%	26%	30%	37%	21%	22%	30%	25%	29%	28%	28%	22%	25%	21%	24%
Advertorial		38%	33%	35%	37%	27%	31%	30%	31%	32%	35%	27%	27%	25%	24%	33%
Brand app		19%	14%	15%	21%	16%	16%	19%	16%	20%	20%	19%	20%	18%	17%	17%
Brand page on social media		23%	19%	22%	30%	19%	18%	27%	24%	25%	32%	26%	21%	23%	23%	23%
Brand video		24%	21%	24%	29%	17%	18%	22%	21%	24%	29%	21%	19%	19%	17%	19%
Brand website		28%	22%	29%	37%	28%	22%	39%	38%	38%	47%	41%	36%	37%	34%	34%
Celeb. Endorsment		19%	17%	21%	26%	17%	16%	19%	17%	19%	22%	16%	18%	14%	16%	17%
Cinema adv.		23%	20%	20%	23%	16%	18%	18%	17%	20%	27%	17%	18%	18%	16%	17%
Digital coupon		38%	25%	33%	37%	24%	31%	29%	24%	24%	21%	23%	19%	20%	19%	24%
Display adv.		32%	25%	28%	36%	23%	22%	28%	28%	29%	30%	27%	24%	24%	21%	24%
Expert info		17%	16%	25%	26%	33%	19%	19%	25%	28%	32%	22%	36%	21%	27%	23%
Forums, blogs, reviews		17%	15%	19%	23%	17%	17%	18%	17%	21%	23%	18%	19%	14%	18%	18%
Free sample		33%	22%	42%	51%	24%	33%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Friends and family		39%	37%	37%	41%	36%	35%	36%	35%	39%	38%	40%	36%	33%	31%	33%
In app adv.		23%	18%	21%	27%	18%	18%	22%	19%	23%	23%	19%	20%	19%	18%	18%
In game adv.		19%	15%	19%	21%	16%	16%	18%	17%	20%	20%	16%	18%	15%	16%	17%
In store promotions		64%	52%	51%	48%	26%	50%	37%	32%	31%	22%	19%	19%	21%	17%	30%
Indoor DOOH		33%	28%	29%	35%	20%	23%	25%	24%	27%	32%	24%	22%	23%	19%	22%
Indoor OOH		31%	28%	30%	35%	18%	23%	24%	22%	25%	28%	22%	22%	25%	19%	20%
Mail folders		43%	28%	36%	40%	23%	30%	35%	31%	30%	36%	27%	29%	29%	25%	33%
Online Audio adv.		18%	17%	17%	20%	16%	16%	17%	15%	19%	21%	17%	18%	15%	16%	17%
Online video adv.		30%	25%	26%	32%	20%	23%	23%	23%	25%	30%	22%	21%	21%	18%	20%
Outdoor DOOH		31%	26%	28%	34%	18%	21%	24%	21%	26%	30%	22%	20%	23%	18%	19%
Outdoor OOH		33%	26%	28%	34%	19%	23%	26%	23%	26%	34%	22%	23%	25%	20%	20%
Packaging		41%	28%	35%	33%	24%	32%	20%	20%	22%	0%	0%	0%	0%	0%	18%
Paper coupon		59%	41%	46%	45%	25%	48%	30%	28%	26%	0%	20%	0%	0%	0%	25%
POS folders		43%	35%	36%	35%	23%	33%	30%	31%	32%	31%	25%	23%	24%	18%	33%
Price comparator		20%	17%	20%	24%	19%	20%	20%	28%	28%	27%	23%	24%	23%	39%	22%
Print loose inserts		36%	30%	33%	34%	24%	30%	31%	30%	30%	36%	26%	25%	25%	21%	32%
Product placement		40%	37%	32%	35%	23%	29%	26%	28%	31%	35%	23%	25%	23%	20%	23%
Public transport OOH		27%	22%	25%	29%	17%	21%	23%	20%	24%	27%	21%	21%	23%	19%	19%
Radio spot		43%	31%	32%	33%	27%	31%	26%	31%	32%	38%	29%	31%	34%	28%	29%
Search engine		35%	25%	32%	39%	31%	25%	34%	43%	42%	44%	47%	33%	32%	33%	37%
Seller info		21%	18%	23%	29%	26%	19%	24%	29%	31%	42%	23%	33%	29%	28%	27%
SMS adv.		17%	13%	17%	19%	16%	15%	18%	15%	18%	22%	16%	18%	16%	16%	16%
Sponsoring		19%	21%	15%	18%	15%	14%	16%	15%	19%	23%	15%	21%	18%	17%	16%
Test product		5%	3%	5%	0%	0%	0%	21%	20%	21%	31%	0%	0%	0%	0%	20%
TV sponsoring		31%	26%	24%	25%	20%	22%	22%	23%	24%	30%	21%	23%	21%	19%	21%
TV spot		62%	56%	55%	55%	43%	52%	42%	47%	48%	56%	41%	40%	49%	35%	39%

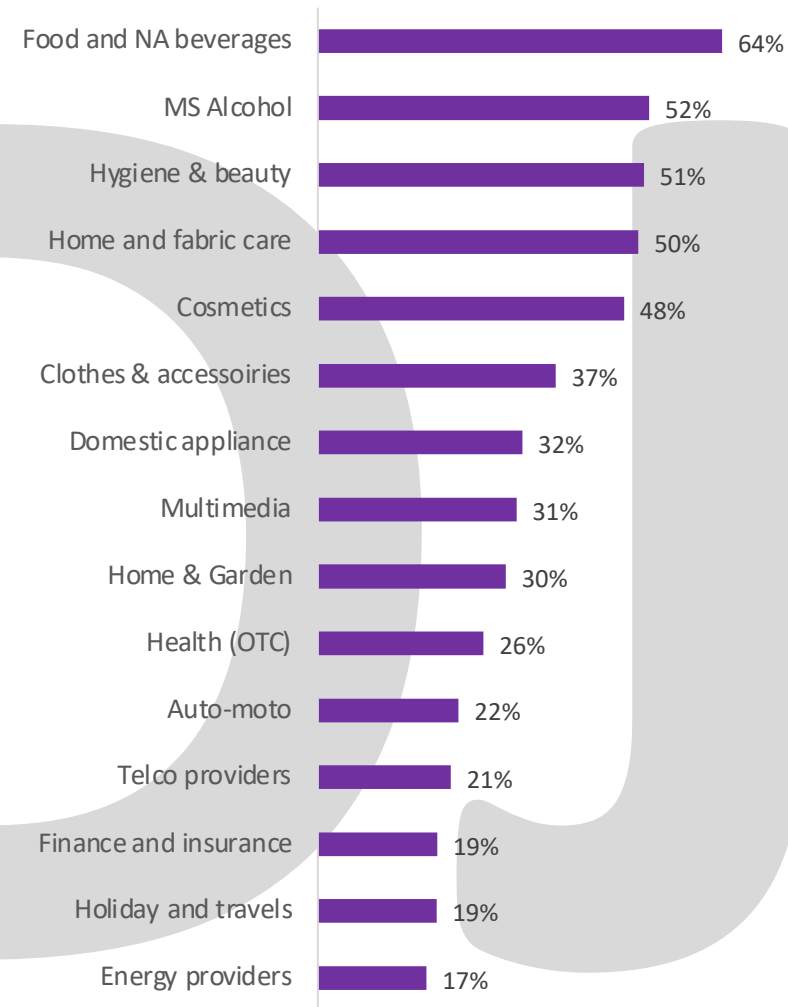
Adv. on social media



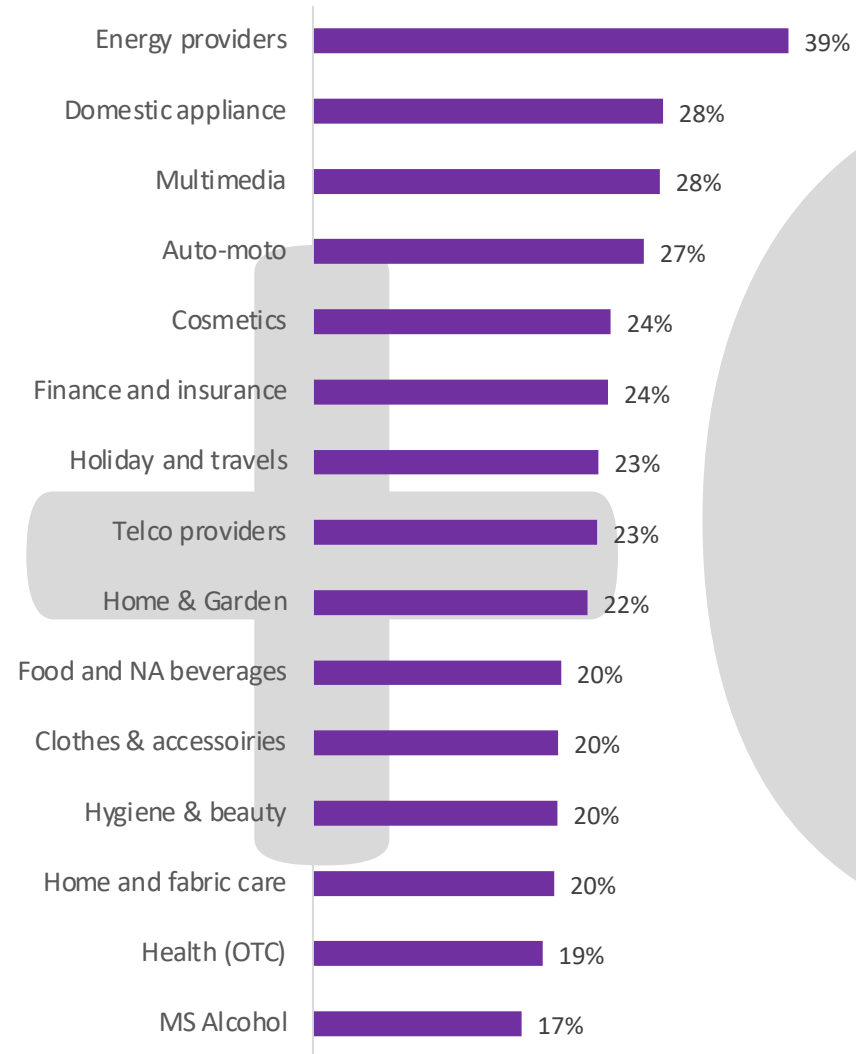
Expert info



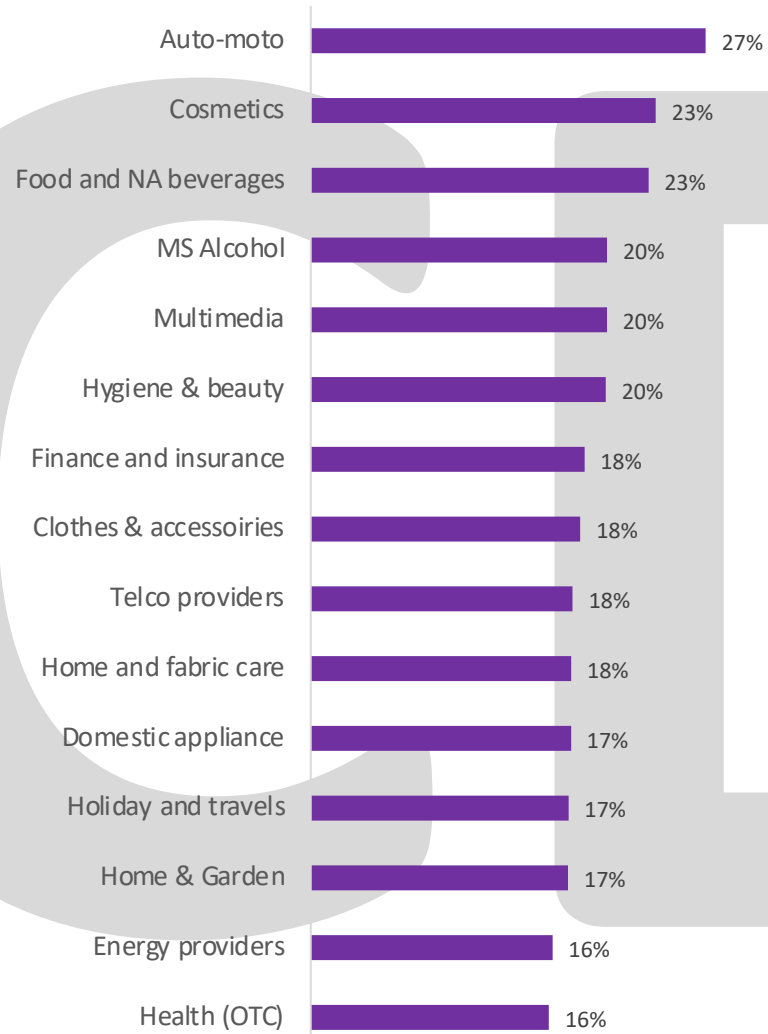
In store promotions



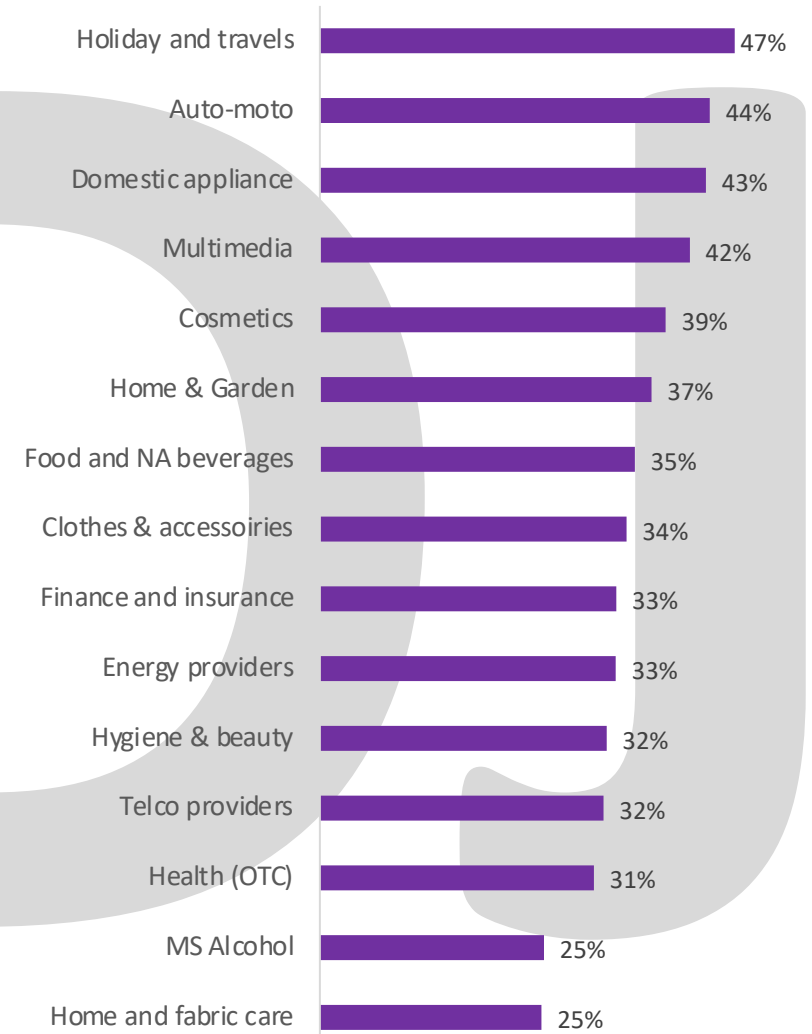
Price comparator



Cinema adv.



Search engine



Alternative source of CIM recruitment

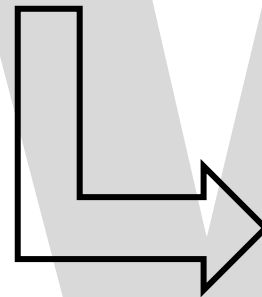
*Sample : 5,500 (dec
22)*

ON AIR

2.0

Part of recruitment for ES – TGM and more

Q1 2022 : MW 1.0 recrutement achieved N=2000



F2F

RDD

Postal

CIM

Online

1.0
POC1

Objectives

Create #2.000 recruitment panel

Representative

Test recruitment channels

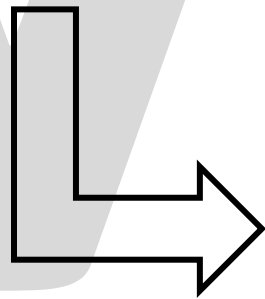
Measure response rate

Effect of survey order, interval, topic

Comparability of results to CIM studies

1.0

Panel size 5.500 → 4.800 fresh recruitment
Timing: mid-August – mid-April (8 months)
Recruitment period: mid-August – end-November



15% F2F
25% RDD
40% Postal
10% Online
10% Other

2.853 (24/10)

2.0
POC2

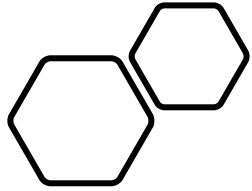
Contribute to CIM studies

ES
TGM
PRESS
RAM
CAT
AD-HOC

Rent a panel

Qualitative recruitment
Link with CIM studies

2.0



*Thank you all.
Now, let's see
what you
remembered ...*

