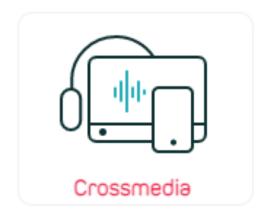


President
Technical Committee Crossmedia



David Lecouvet, Voorzitter

Mediabrands Belgium

Stefan Delaeter

VAR

Linda Scheerlinck

Roularta

Mathilde De Maere

Havas Media Belgium

Brigitte Gilson

GroupM Belgium

Sabrina Van Impe

JC Decaux



Panel Mediawatch (MW 2.0)

Monitor

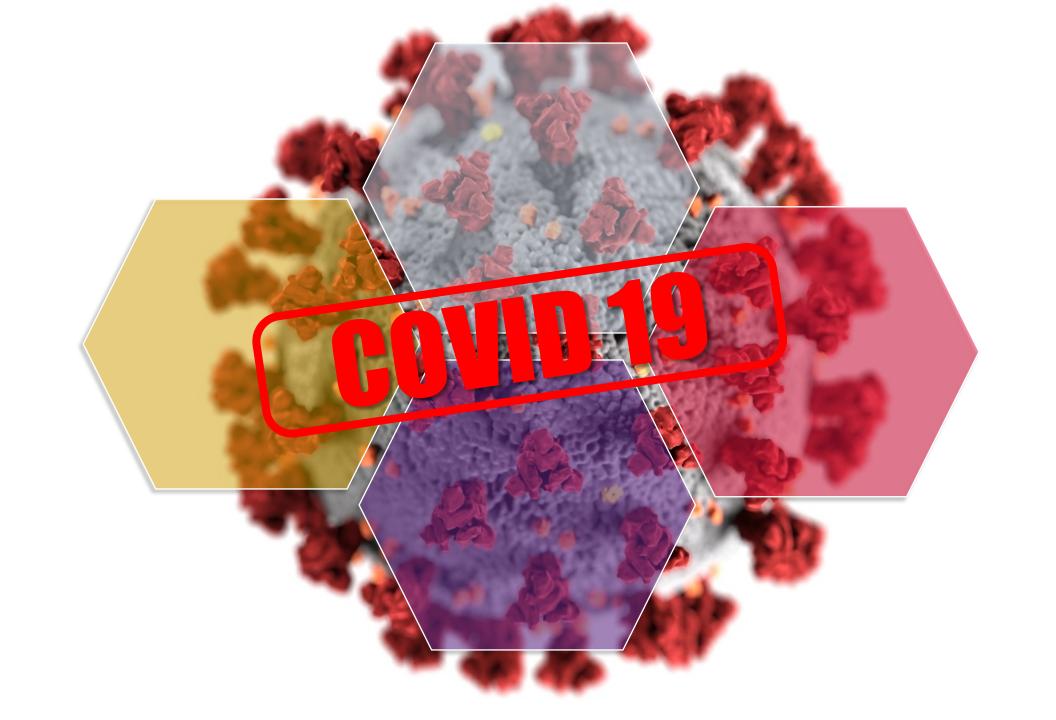
Target

Group

(TGM)

Establishment Survey (ES)

Consumer Decision Journey (CDJ)



Major trends in media use



...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?



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

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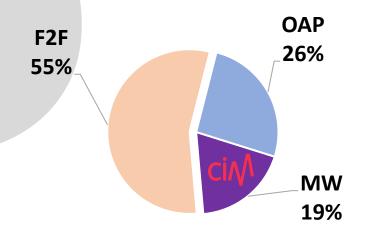
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3.214 - F2F
1.502 - CAWI (OAP)
1.090 - CAWI (MW)



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

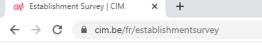
COMPORTEMENTS INTERNETGEDRAG

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 audioLes questions suivantes portent sur votre écoute de la radio et d'autres contenus audio



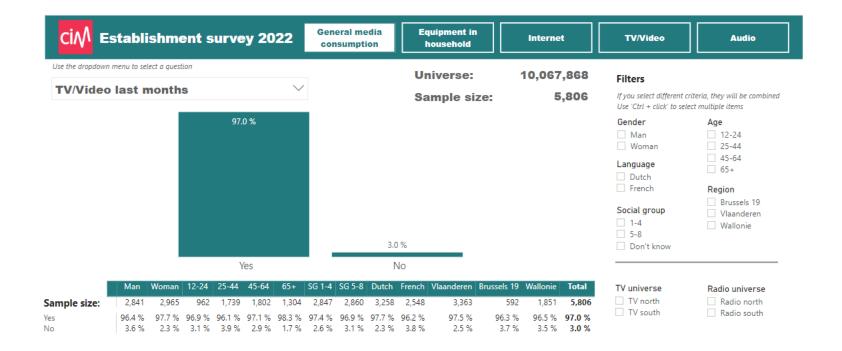


Establishment Survey

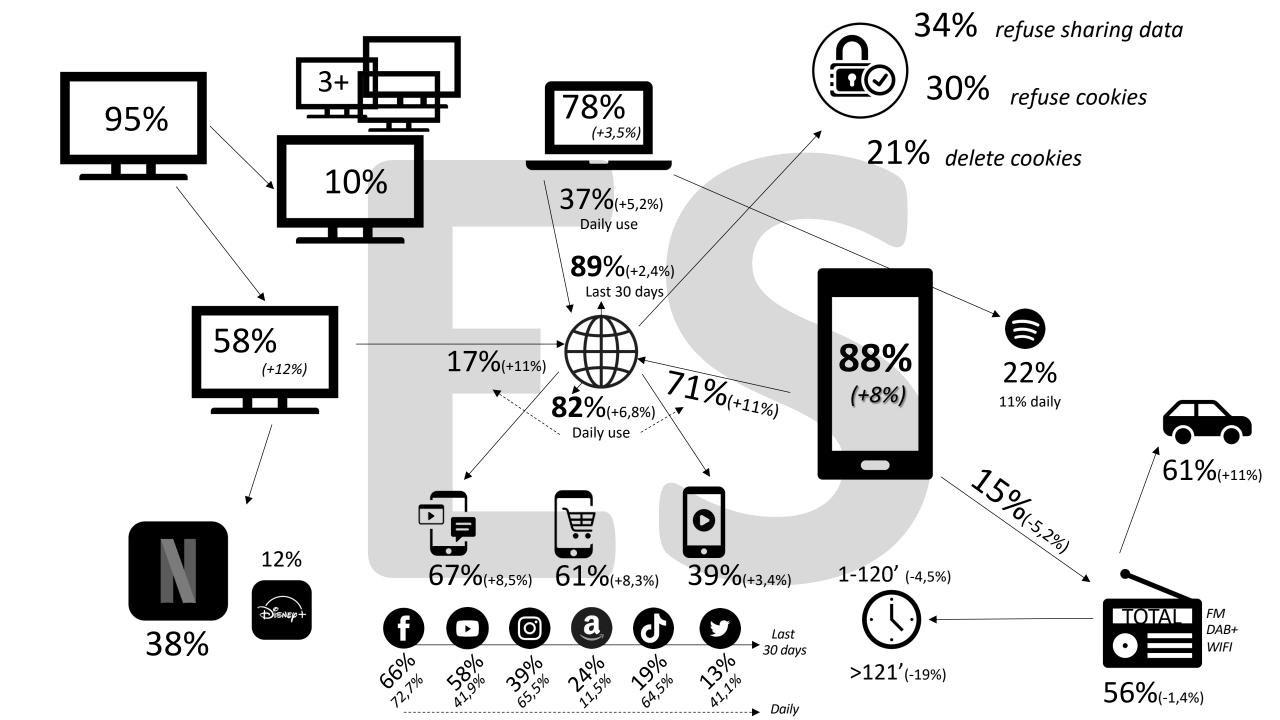
L'objectif de l'Establishment Survey (ES) est de mesurer, chaque année, les grandes tendances dans l'utilisation des médias : Quelle est l'évolution de la possession en matière d'équipements médias ? Quelles sont les tendances générales de la consommation de TV/vidéo, audio et d'internet ?

Les réponses à ces questions se trouvent dans les résultats de l'ES. Les souscripteurs ont accès à tous les détails via leur logiciel. Mais les principaux résultats sont également rendus accessible pour tout le monde via le Dashboard ci-dessous.

Dans ce Dashboard, vous pourrez choisir plusieurs questions pour chacun des chapitres de l'étude ainsi que différents filtres socio-démographiques.



You can Copy/Paste results into Excel



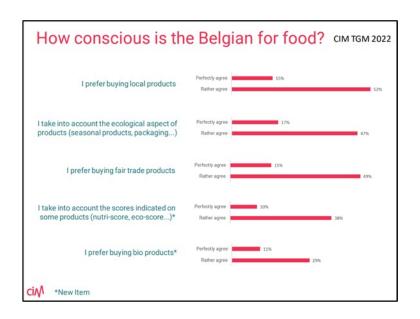
>1,000 questions about purchases and consumer attitudes...

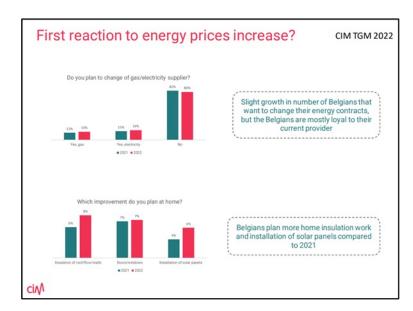


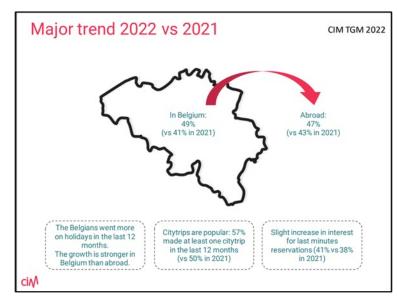
...about the consumption habits, lifestyle and equipment

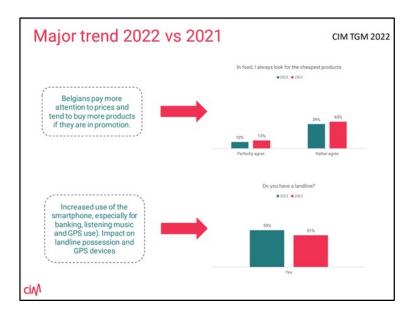












https://www.cim.be/resources/news_images/TGM2022_presentation.pdf



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



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



48% Perfectly/rather agree



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



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



Type of purchase means to sleep better

66% No purchase of this type



The ease of online shopping

23% very/rather important



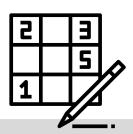
Frequency buying Website supermarket with home delivery

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

via the short chain (at a local producer)



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



Conduct virtual meetings (private or professional)

49% conduct virtual meetings



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

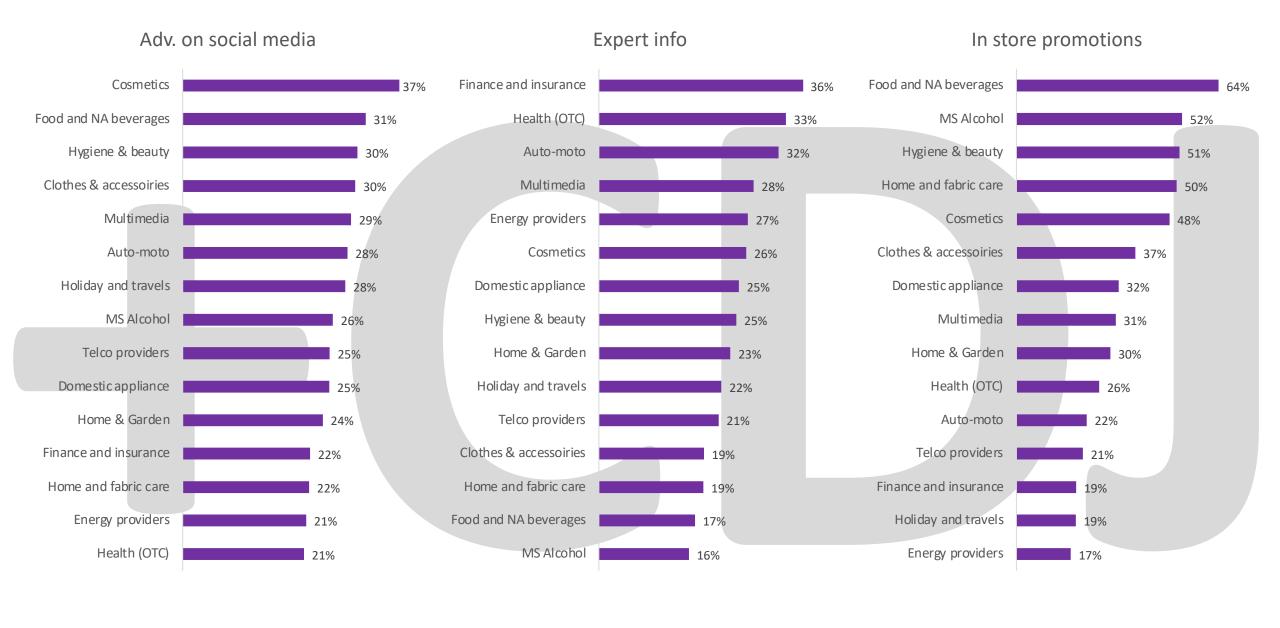
Add new channels: C8, LN24, Eclips TV, NJAM!, Play 7

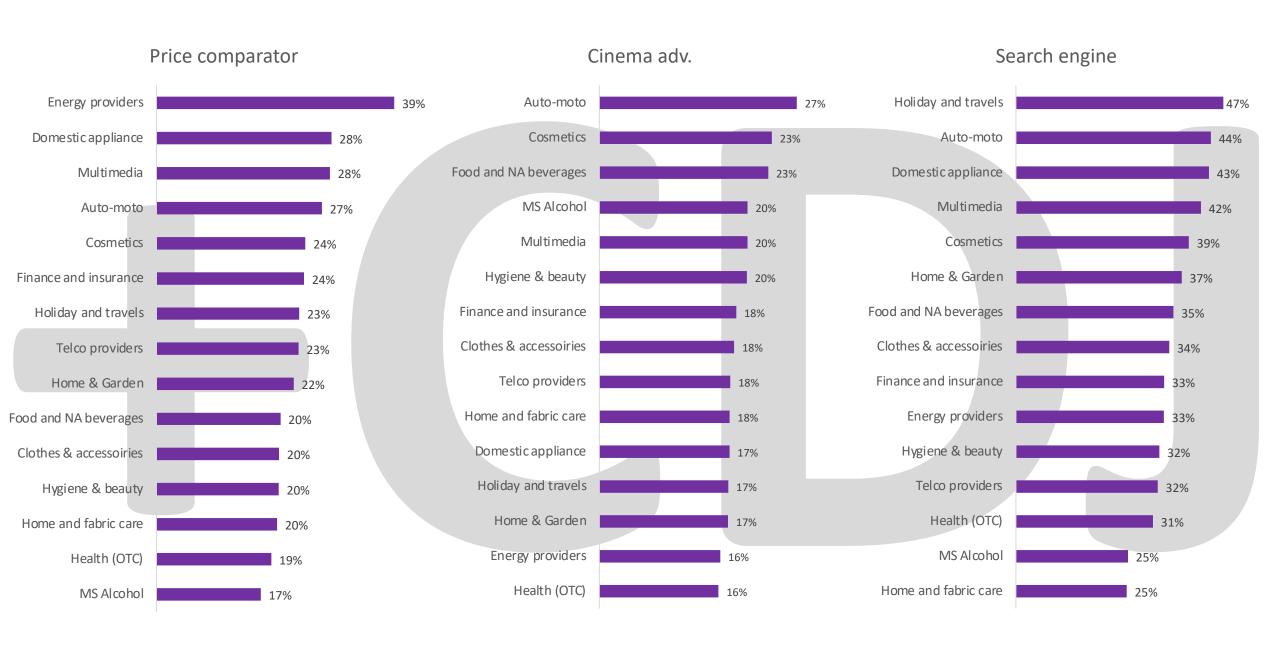
Consumer decision journey on 8,139 respondants...



on 15 sectors and 43 touchpoints available

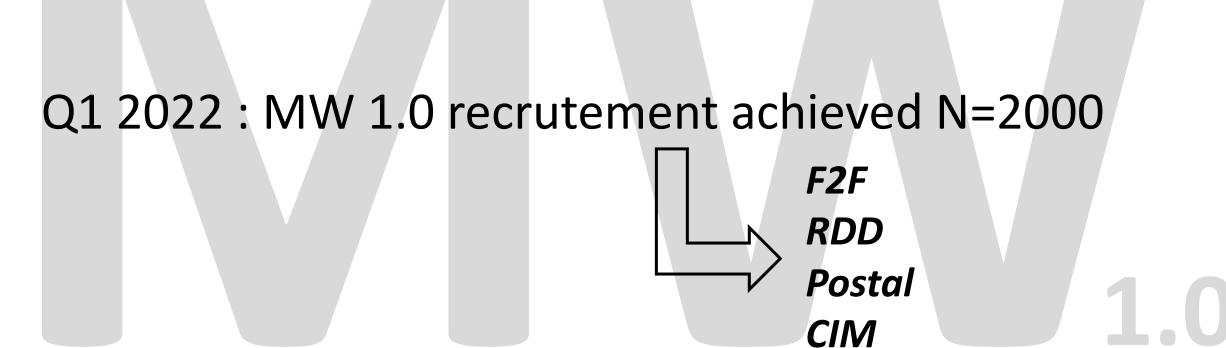
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Adv. email	35%	22%	35%	43%	28%	25%	41%	30%	32%	34%	36%	35%	33%	33%	29%
Adv. In dailies	36%	31%	32%	32%	24%	30%	30%	30%	30%	36%	26%	27%	24%	23%	32%
Adv. In freesheet	48%	38%	40%	39%	27%	37%	35%	39%	37%	39%	27%	27%	28%	24%	40%
Adv. In magazines	36%	33%	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%
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Brand website	28%	22%	29%	37%	28%	22%	39%	38%	38%	47%	41%	36%	37%	34%	34%
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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%			39%		25%	34%	43%		44%	47%		32%	33%	37%
Seller info	21%			29%		19%	24%	29%		42%	23%	33%	29%	28%	27%
SMS adv.	17%			19%		15%	18%	15%		22%			16%	16%	16%
Sponsoring	19%			18%			16%	15%		23%			18%	17%	16%
Test product	5%			0%		0%	21%	20%		31%			0%	0%	20%
TV sponsoring	31%			25%		22%	22%	23%		30%			21%	19%	21%
TV spot	62%			55%				47%		56%			49%	35%	39%







Part of recruitment for ES – TGM and more



Online

POC1

Objectives

Create #2.000 recruitment panel

Representative

Test recruitment channels

Measure response rate

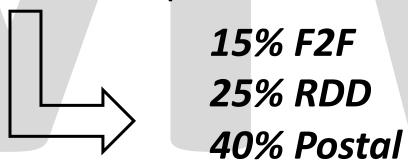
Effect of survey order, interval, topic

Comparability of results to CIM studies



Timing: mid-August – mid-April (8 months)

Recruitment period: mid-August – end-November



10% Online

10% Other

2.853 (24/10)

POC2

Contribute to CIM studies

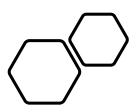
Rent a panel

ES **TGM PRESS RAM** CAT **AD-HOC**

Qualitative recruitment

Link with CIM studies

2.0



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

