

# UBA MEDIA INVESTMENTS

2020 IN BELGIUM



Taking brands further

The United Brands Association (UBA) helps advertisers to maximise the return on their communication investments in an open, transparent communication environment. Advertisers need accurate information about media investments and media reach in Belgium. Thanks to Nielsen and the Centre for Information about the Media (CIM), a lot of information is available in this regard. Media agencies and Sales Houses can provide advertisers with detailed information, but still UBA feels it is important to make available free reference documents, easy accessible to our members.

Nielsen measures the gross advertising pressure. This means that the quoted investments are based on the gross media investments rather than the amount actually paid.

We wish to thank everyone who contributed to the creation of this overview, especially Nielsen. They ensure that we can communicate transparently about media to our members.

We would specifically like to thank the United Media Agencies (UMA). The publication of this document has been made possible thanks to the constructive cooperation. Special thanks goes to Remi Boel, OMD.



Simone Ruseler  
Knowledge Manager UBA

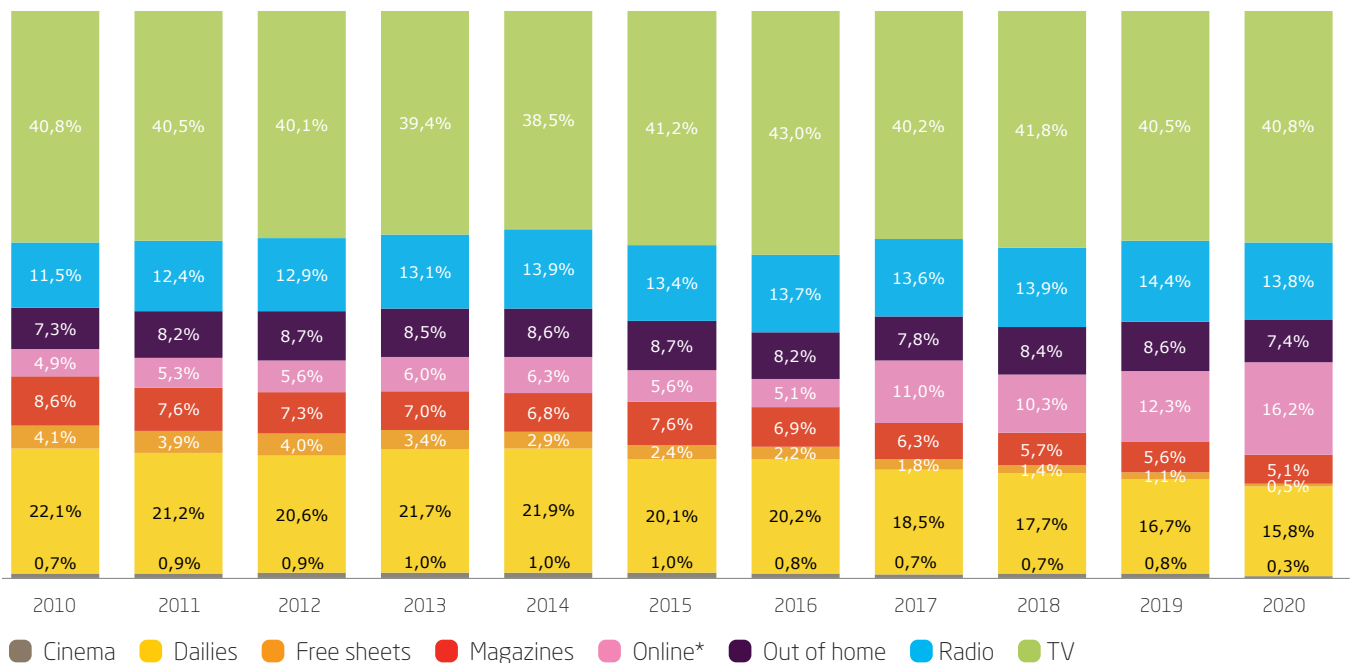


Luc Suykens  
CEO UBA

## 1. Evolution of gross media investments 2010 - 2020

- Gross media spend has declined over the past three years. Figures dropped by 1,5% in 2018 and by 1,9% in 2019. In the Covid-19 year we recorded a 10,7% drop in total gross media investments compared to 2019 (offline media: -14,7%). As a result, this past year total gross media spend dropped to a level comparable to 2013. Cinema advertising suffered the biggest downturn (-64,9%), followed by freesheets (-57,3%), OOH (-23,3%), magazines (-18%), newspapers (-15,6%), radio (-14,4%) and TV (-10,1%). Online advertising was the only medium to register actual growth (+17,5%) in this most unusual year. Looking at market shares, we see that the share of online advertising has grown by 3,9 percentage points. TV has consolidated its market share with a marginal growth of 0,3 percentage points. All other media have lost market share: cinema: -0,5 percentage points; newspapers: -0,9 percentage points; freesheets: -0,6 percentage points; magazines: -0,5 percentage points; OOH: -1,2 percentage points; radio: -0,6 percentage points.

### Evolution of share of voice 2010 - 2020 - Belgium



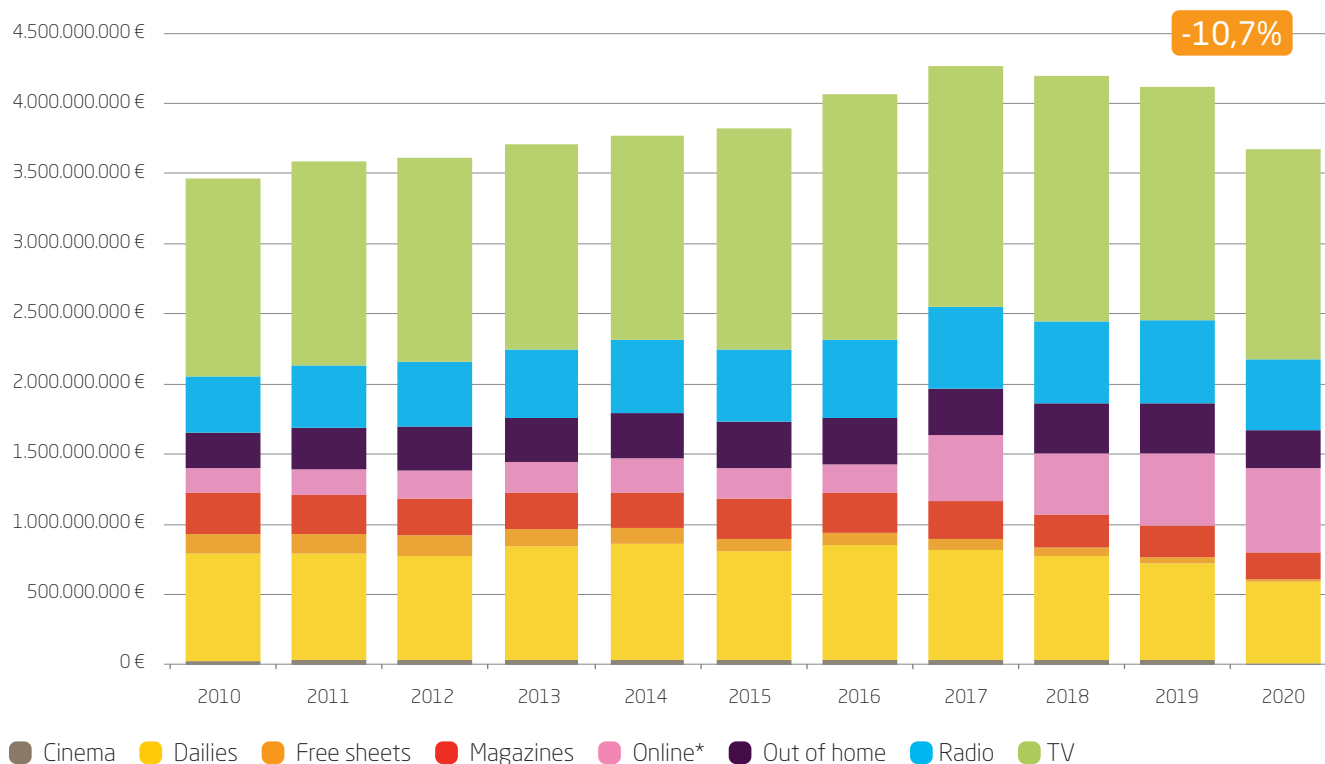
IN SOV	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
CINEMA	0,7%	0,9%	0,9%	1,0%	1,0%	1,0%	0,8%	0,7%	0,7%	0,8%	0,3%
DAILIES	22,1%	21,2%	20,6%	21,7%	21,9%	20,1%	20,2%	18,5%	18,5%	16,7%	15,8%
FREE SHEETS	4,1%	3,9%	4,0%	3,4%	2,9%	2,4%	2,2%	1,8%	1,8%	1,1%	0,5%
MAGAZINES	8,6%	7,6%	7,3%	7,0%	6,8%	7,6%	6,9%	6,3%	6,3%	5,6%	5,1%
ONLINE*	4,9%	5,3%	5,6%	6,0%	6,3%	5,6%	5,1%	11,0%	11,0%	12,3%	16,2%
OUT OF HOME	7,3%	8,2%	8,7%	8,5%	8,6%	8,7%	8,2%	7,8%	7,8%	8,6%	7,4%
RADIO	11,5%	12,4%	12,9%	13,1%	13,9%	13,4%	13,7%	13,6%	13,6%	14,4%	13,8%
TV	40,8%	40,5%	40,1%	39,4%	38,5%	41,2%	43,0%	40,2%	40,2%	40,5%	40,8%
<b>TOTAL</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>

Source: Nielsen

\* online = new measurement method since 2017. Comparison for online media spendings with previous years is not possible. More information on page 11.

This crawling methodology does not allow the measurement of password-protected platforms (as Facebook) meaning that the current figures reflect a portion only of actual total digital spends and is grossly underestimated.

## Evolution of gross media investments 2010 - 2020 - Belgium



IN kEURO	2010	2011	2012	2013	2014	2015
CINEMA	25.679	30.927	32.950	37.696	37.833	37.457
DAILIES	767.794	761.158	745.042	802.621	824.951	767.469
FREE SHEETS	141.112	140.774	142.592	124.428	110.753	90.463
MAGAZINES	296.627	274.001	262.631	258.047	256.521	291.705
ONLINE*	168.332	188.777	200.986	223.601	237.341	215.007
OUT OF HOME	254.502	294.119	312.708	313.681	324.642	330.925
RADIO	398.967	445.246	465.715	484.657	523.926	513.823
TV	1.414.340	1.453.904	1.446.358	1.459.729	1.450.342	1.577.482
<b>TOTAL</b>	<b>3.467.353</b>	<b>3.588.906</b>	<b>3.608.982</b>	<b>3.704.461</b>	<b>3.766.311</b>	<b>3.824.331</b>
	<b>9,4%</b>	<b>3,5%</b>	<b>0,6%</b>	<b>2,6%</b>	<b>1,7%</b>	<b>1,5%</b>

IN kEURO	2016	2017	2018	2019	2020	DIFF 2020/2019
CINEMA	31.600	30.743	31.277	31.281	10.968	-64,9% ●
DAILIES	820.711	786.936	742.396	688.859	581.511	-15,6% ●
FREE SHEETS	89.389	77.677	58.365	44.875	19.142	-57,3% ●
MAGAZINES	281.469	270.322	240.871	229.498	188.148	-18,0% ●
ONLINE*	205.312	470.802	432.616	507.992	597.130	17,5% ●
OUT OF HOME	331.939	332.128	353.468	355.918	273.118	-23,3% ●
RADIO	558.254	578.296	583.027	592.181	507.058	-14,4% ●
TV	1.746.479	1.715.410	1.754.365	1.666.931	1.498.192	-10,1% ●
<b>TOTAL</b>	<b>4.065.153</b>	<b>4.262.314</b>	<b>4.196.385</b>	<b>4.117.534</b>	<b>3.675.266</b>	<b>-10,7% ●</b>
	<b>6,3%</b>	<b>4,9%</b>	<b>-1,5%</b>	<b>-1,9%</b>	<b>-10,7%</b>	

offline: -14,7% ●

Source: Nielsen

\* online = new measurement method since 2017. Comparison for online media spendings with previous years is not possible. More information on page 11.

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## 2. Top 100 advertisers (gross media investments)

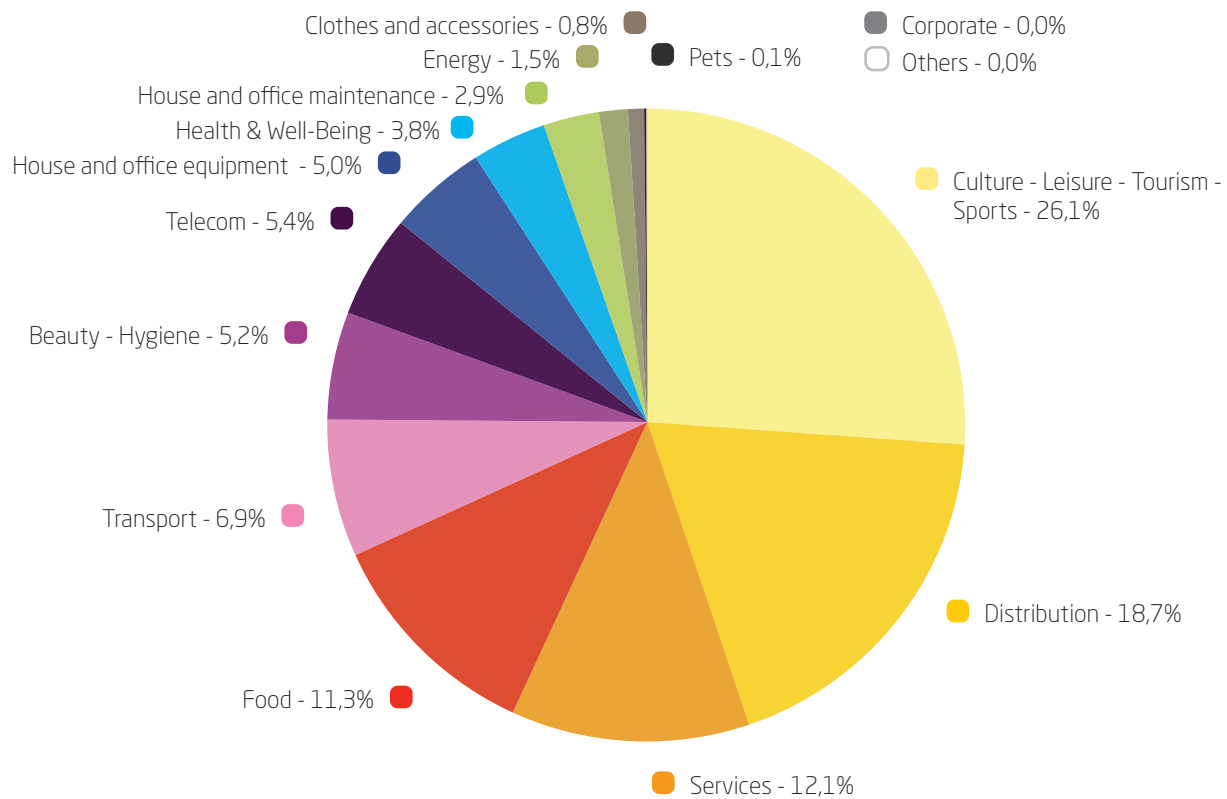
- What is striking in the top 100 advertisers is the prominence of gross 'investments' by media companies. Like last year, DPG Media tops the list.
- This atypical Covid-19 year is characterised by several other remarkable evolutions, such as the major upswing in media spending by retailers, the twin movement of gainers and losers in the fast mover category, the clear divestment in sectors that have been particularly hard hit by the lockdown such as the automotive industry and, last but not least, the massive upturn in investments in the e-commerce and home delivery sectors.
- In the retail industry Colruyt realised a growth of 30%, Ahold Delhaize 61%, Aldi 44.5% and Lidl 12%. Carrefour (-29,5%) and Metro Group (-9,8%) are the only ones in this group to record significant losses.
- In the fast mover category P&G (+2,5%), Beiersdorf (+8,4%) and Unilever (+8,8%) spent moderately more on media as opposed to a big upswing for Mondelez (+50%), Nestlé (+52.7%), Pepsico (+59%) and Henkel (+89,2%). However, other companies spent considerably less on media: R&B (-8,9%), The Coca Cola Company (-38,6%), L'Oréal (-17,6%) and Ferrero (-37,6%).
- In the car manufacturing industry top 100 D'Ieteren (-48,4%), PSA Group (-53,4%), Renault - Nissan (-41,2%), Fiat Chrysler (-46,3%), Daimler (-21,7%), Geely (-17,9%) and Ford (-40,3%) cut spending, with a status quo for BMW (-0,4%).
- In e-commerce and home delivery we noticed a marked increase for: Coolblue (+170,2%), Rocket Internet (+42,5%), Takeway.com (+34,7%) and Hello Fresh (+18,4%).

RANK 2020	ADVERTISERGROUP	2020 IN kEURO	2019 IN kEURO	DIFF 2020/2019	RANK 2019
1	DPG MEDIA	146.491	149.690	-2,1%	1
2	PROCTER & GAMBLE BENELUX	116.744	113.933	2,5%	2
3	COLRUYT GROUP	83.838	64.467	30,0%	6
4	AHOLD DELHAIZE	77.356	48.142	60,7%	12
5	MEDIAHUIS	75.320	60.444	24,6%	7
6	TELENET GROUP HOLDING	59.333	58.136	2,1%	8
7	UNILEVER	53.310	49.007	8,8%	11
8	ROULARTA MEDIA GROUP	48.912	47.288	3,4%	13
9	RECKITT & BENCKISER	46.559	51.133	-8,9%	10
10	COMMUNITIES & REGIONS	45.329	41.466	9,3%	17
11	THE COCA-COLA COMPANY	45.292	73.717	-38,6%	4
12	ALDI	44.459	30.761	44,5%	22
13	ORANGE	42.072	42.932	-2,0%	16
14	PROXIMUS GROUP	41.616	56.830	-26,8%	9
15	D'IETEREN GROUP	39.486	76.533	-48,4%	3
16	LOTTERIE NATIONALE	39.045	30.133	29,6%	24
17	MONDELEZ INTERNATIONAL	36.303	24.189	50,1%	30
18	PSA GROUP	32.823	70.420	-53,4%	5
19	NETHYS	32.397	31.665	2,3%	20
20	NESTLE GROUP	31.282	20.492	52,7%	37
21	LIDL & CO	30.698	27.407	12,0%	28
22	L'OREAL GROUP	28.683	34.821	-17,6%	19
23	THE WALT DISNEY COMPANY	27.604	27.755	-0,5%	27
24	RENAULT-NISSAN ALLIANCE	27.545	46.871	-41,2%	15
25	PEPSICO	27.319	17.180	59,0%	47
26	FERRERO	25.865	41.426	-37,6%	18
27	SAGEVAS	25.626	9.333	174,6%	85
28	AS WATSON	25.312	19.381	30,6%	40
29	IPM GROUPE	23.467	22.606	3,8%	32
30	BMW GROUP BELGIUM	23.389	23.483	-0,4%	31
31	BELGIAN FEDERAL STATE	22.774	6.325	260,1%	131
32	CLT-UFA	22.733	20.779	9,4%	35
33	VRT	22.238	30.205	-26,4%	23
34	BNP-PARIBAS	21.943	19.289	13,8%	41
35	BEIERSDORF	21.565	19.889	8,4%	38
36	VINTED	21.382	30.961	-30,9%	21
37	RTBF	20.150	16.396	22,9%	49
38	HENKEL	19.535	10.322	89,2%	72
39	SBS BELGIUM	19.318	21.734	-11,1%	34
40	CONTINENTAL FOODS	18.397	17.340	6,1%	44

RANK 2020	ADVERTISERGROUP	2020 IN KEURO	2019 IN KEURO	DIFF 2020/2019	RANK 2019
41	AXA GROUP	18.181	13.217	37,6%	59
42	SPADEL	17.743	13.235	34,1%	58
43	METRO GROUPE	17.734	19.671	-9,8%	39
44	CARREFOUR GROUP	17.461	24.774	-29,5%	29
45	COLGATE-PALMOLIVE	16.771	15.343	9,3%	51
46	COOLBLUE	16.495	6.106	170,2%	136
47	FIAT CHRYSLER AUTOMOBILES	15.753	29.341	-46,3%	25
48	KBC GROUP	13.919	18.731	-25,7%	42
49	DAIMLER BENZ GROUP	13.874	17.728	-21,7%	43
50	LEGO BELGIUM	13.286	10.541	26,0%	70
51	PERRIGO	13.260	11.089	19,6%	67
52	FAIRCOOP	13.250	6.507	103,6%	125
53	ROCKET INTERNET	13.232	9.287	42,5%	87
54	BELFIUS BANQUE & ASSURANCES	13.142	22.374	-41,3%	33
55	GLAXOSMITHKLINE	12.636	16.539	-23,6%	48
56	SAMSUNG GROUP	12.428	8.311	49,5%	95
57	KINEPOLIS GROUP	12.380	10.441	18,6%	71
58	ING GROEP	12.189	11.529	5,7%	64
59	HELLOFRESH	12.124	10.242	18,4%	74
60	GROUPE VERS L'AVENIR	11.738	11.143	5,3%	66
61	ETHIAS	11.655	10.055	15,9%	77
62	MCDONALD'S	11.639	13.318	-12,6%	57
63	ENGIE	11.012	12.061	-8,7%	61
64	3I GROUP	10.544	14.663	-28,1%	53
65	STADA	10.403	7.728	34,6%	107
66	IKEA BELGIUM	10.392	8.293	25,3%	96
67	HEDO	10.342	7.298	41,7%	112
68	GEELY SWEDEN AB	9.714	11.831	-17,9%	62
69	ROSSEL	9.628	8.228	17,0%	97
70	FORD MOTOR COMPANY	9.620	16.114	-40,3%	50
71	ALCOPA	9.577	9.368	2,2%	84
72	NOMAD	9.456	10.177	-7,1%	75
73	DYSON	9.269	8.023	15,5%	102
74	SPIRITUS	9.203	6.369	44,5%	130
75	NINTENDO	9.176	8.993	2,0%	90
76	CRELAN	8.996	13.809	-34,9%	55
77	TAKEAWAY.COM CENTRAL CORE	8.886	6.594	34,7%	123
78	FRIESLANDCAMPINA	8.864	8.472	4,6%	93
79	GROUPE 3 SUISES	8.737	6.256	39,6%	132
80	MARS INCORPORATED	8.574	6.730	27,4%	120
81	SHOP-APOTHEKE	8.558	9.297	-8,0%	86
82	MITSUBISHI GROUP	8.406	664	1166,9%	632
83	X2O	8.320	4.683	77,6%	163
84	RADIO CONTACT	8.157	6.742	21,0%	119
85	SNAIDERO INTERNATIONAL	8.091	7.625	6,1%	109
86	QVIVA	8.066	2.708	197,9%	232
87	EDF LUMINUS	8.031	15.185	-47,1%	52
88	JAGUAR LAND ROVER BELUX	7.893	13.987	-43,6%	54
89	MYENERGYCHOICE	7.840	10.899	-28,1%	68
90	AGEAS	7.821	10.134	-22,8%	76
91	DOVY	7.778	8.171	-4,8%	99
92	FNAC BELGIUM	7.455	10.288	-27,5%	73
93	MENATAM	7.264	7.010	3,6%	115
94	BURGER BRANDS	7.250	9.813	-26,1%	80
95	EMESA	7.156	7.275	-1,6%	113
96	WIJKOPENAUTOS	7.149	11.616	-38,5%	63
97	BRUSSELS AIRLINES	7.076	9.739	-27,3%	81
98	GRAND VISION BELGIUM	7.064	8.603	-17,9%	91
99	KREFEL	6.982	7.997	-12,7%	104
100	SUNTORY	6.976	9.431	-26,0%	83

### 3. Gross media spend per economic group

'Culture, tourism, leisure and sports' still leads the charge with 26,1% despite a marked downturn in investments (-13,1%). The only climbers in this Covid-19 year were 'House and office equipment' (+17,6%) and 'Health & Well-being' (+7,8%).



	IN SOV	IN KEURO	IN KEURO	DIFF
	2020	2019	2020	2020/2019
CULTURE - LEISURE - TOURISM - SPORTS	26,1%	1.105.117	960.340	-13,1% ●
DISTRIBUTION	18,7%	712.462	687.554	-3,5% ●
SERVICES	12,1%	471.437	443.598	-5,9% ●
FOOD	11,3%	461.102	415.015	-10,0% ●
TRANSPORT	6,9%	400.085	254.556	-36,4% ●
TELECOM	5,4%	201.232	200.107	-0,6% ●
BEAUTY - HYGIENE	5,2%	243.002	192.827	-20,6% ●
HOUSE AND OFFICE EQUIPMENT	5,0%	187.196	184.639	-1,4% ●
HEALTH & WELL BEING	3,8%	130.128	140.298	7,8% ●
HOUSE AND OFFICE MAINTENANCE	2,9%	89.540	105.313	17,6% ●
ENERGY	1,5%	63.178	54.464	-13,8% ●
CLOTHES AND ACCESSORIES	0,8%	41.282	30.366	-26,4% ●
PETS	0,1%	5.825	4.072	-30,1% ●
CORPORATE	0,0%	4.184	1.455	-65,2% ●
OTHERS	0,0%	1.764	662	-62,4% ●
	<b>100,0%</b>	<b>4.117.534</b>	<b>3.675.266</b>	<b>-10,7% ●</b>

Source: Nielsen

## 4. Evolution of gross media investments per economic group and medium type

- This table details the share every economic group represents within each medium type.
- Example: in 2020 the economic group 'Beauty Hygiene' accounted for 5,2% of overall media spend. However, within the medium of movie theatres, this economic group represents 2,1%. In 2020 this economic group invested 78,3% less in the medium of movie theatres compared to 2019.

	IN SOV	CINEMA			DAILIES		FREE SHEETS		INTERNET	
	2020	SHARE	EVOL		SHARE	EVOL	SHARE	EVOL	SHARE	EVOL
CULTURE - LEISURE - TOURISM - SPORTS	26,1%	54,8%	-61,3%	●	35,5%	-20,7%	●	18,3%	-62,2%	●
DISTRIBUTION	18,7%	0,9%	-88,6%	●	25,7%	-7,9%	●	38,5%	-64,7%	●
SERVICES	12,1%	21,9%	-44,9%	●	21,5%	10,3%	●	13,4%	-44,3%	●
FOOD	11,3%	11,9%	-73,1%	●	3,5%	-25,9%	●	1,5%	-47,8%	●
TRANSPORT	6,9%	3,6%	-84,0%	●	5,0%	-44,7%	●	8,3%	21,8%	●
TELECOM	5,4%	4,0%	-65,3%	●	2,1%	-37,9%	●	0,0%	-92,8%	●
BEAUTY - HYGIENE	5,2%	2,1%	-78,3%	●	0,0%	-56,4%	●	0,5%	-54,1%	●
HOUSE AND OFFICE EQUIPMENT	5,0%	0,3%	-90,4%	●	4,0%	-26,3%	●	14,6%	-51,1%	●
HEALTH & WELL BEING	3,8%	0,6%	-77,5%	●	1,0%	-15,5%	●	3,7%	-56,9%	●
HOUSE AND OFFICE MAINTENANCE	2,9%	0,0%	-100,0%	●	0,2%	32,4%	●	0,1%	16,3%	●
ENERGY	1,5%	0,0%	-100,0%	●	1,0%	-27,6%	●	0,7%	-5,4%	●
CLOTHES AND ACCESSORIES	0,8%	0,1%	-91,7%	●	0,2%	-60,8%	●	0,1%	-89,3%	●
PETS	0,1%	0,0%	-		0,0%	-82,2%	●	0,0%	-77,7%	●
CORPORATE	0,0%	0,0%	-		0,1%	219,1%	●	0,0%	-	
OTHERS	0,0%	0,0%	-		0,0%	-68,7%	●	0,3%	-80,7%	●
<b>GRAND TOTAL</b>	<b>100,0%</b>	<b>100,0%</b>	<b>-64,9%</b>		<b>100,0%</b>	<b>-15,6%</b>		<b>100,0%</b>	<b>-57,3%</b>	

	IN SOV	MAGAZINES			OUT OF HOME		RADIO		TV	
	2020	SHARE	EVOL		SHARE	EVOL	SHARE	EVOL	SHARE	EVOL
CULTURE - LEISURE - TOURISM - SPORTS	26,1%	46,7%	-5,6%	●	17,5%	-9,2%	●	19,6%	-21,4%	●
DISTRIBUTION	18,7%	13,5%	-21,0%	●	17,3%	3,2%	●	31,6%	-8,2%	●
SERVICES	12,1%	10,9%	-22,6%	●	12,2%	-14,2%	●	16,9%	-10,8%	●
FOOD	11,3%	2,8%	-30,3%	●	15,4%	-36,3%	●	3,0%	-16,1%	●
TRANSPORT	6,9%	3,7%	-43,3%	●	14,5%	-45,9%	●	10,4%	-33,2%	●
TELECOM	5,4%	0,7%	27,3%	●	13,6%	-4,9%	●	6,6%	8,3%	●
BEAUTY - HYGIENE	5,2%	4,3%	-37,7%	●	4,8%	-44,0%	●	0,2%	-37,3%	●
HOUSE AND OFFICE EQUIPMENT	5,0%	7,4%	-26,5%	●	1,8%	28,5%	●	6,0%	-25,6%	●
HEALTH & WELL BEING	3,8%	2,7%	23,8%	●	0,9%	56,8%	●	1,8%	11,7%	●
HOUSE AND OFFICE MAINTENANCE	2,9%	0,1%	29,5%	●	0,2%	918,1%	●	0,0%	-41,8%	●
ENERGY	1,5%	1,0%	-4,2%	●	0,5%	-62,8%	●	3,8%	26,3%	●
CLOTHES AND ACCESSORIES	0,8%	5,9%	-39,6%	●	0,9%	-44,2%	●	0,0%	-37,2%	●
PETS	0,1%	0,2%	204,4%	●	0,0%	-44,1%	●	0,0%	-90,9%	●
CORPORATE	0,0%	0,0%	12,7%	●	0,3%	-77,2%	●	0,0%	-86,8%	●
OTHERS	0,0%	0,0%	-100,0%	●	0,0%	-		0,0%	-95,2%	●
<b>GRAND TOTAL</b>	<b>100,0%</b>	<b>100,0%</b>	<b>-18,0%</b>		<b>100,0%</b>	<b>-23,3%</b>		<b>100,0%</b>	<b>-14,4%</b>	

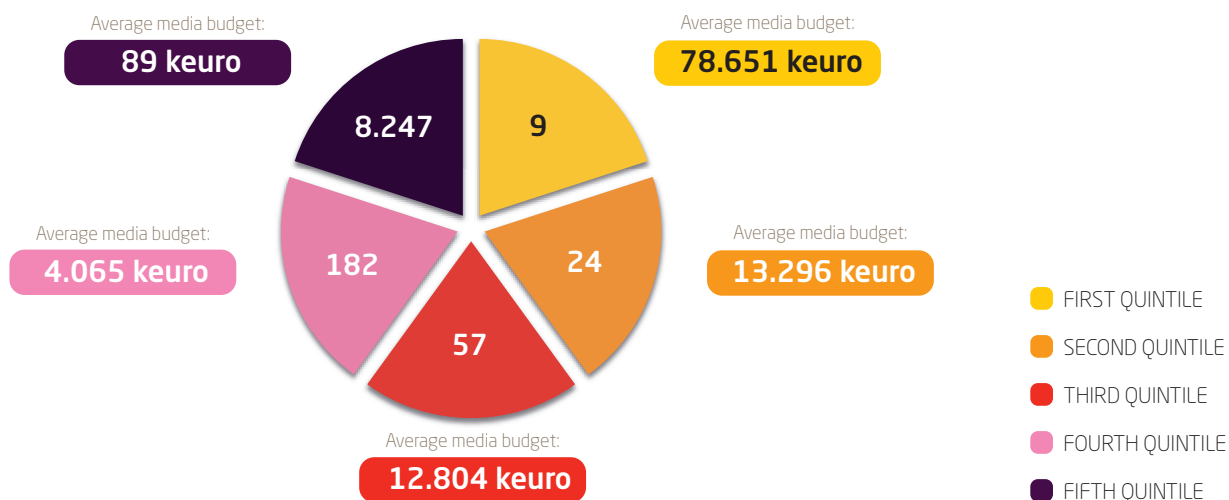
Source: Nielsen



## 5. Advertiser split and media mix per budget size

- In 2020 there were 404 advertisers more than in 2019 (8.519 in 2020 as opposed to 8.115 in 2019).
- In 2020, **9 advertisers** (0,11% of the total number) accounted for **± 20% of the total media spend** in Belgium.
- **272** or 3,2% of **advertisers** accounted for **80% of the total media spend** in Belgium.

2020	NUMBER OF ADVERTISERS	AVERAGE MEDIA BUDGET IN KEURO	SOV							
			CINEMA	DAILIES	FREE SHEETS	INTERNET	MAGAZINES	OUT OF HOME	RADIO	TV
FIRST QUINTILE	9	78.651	0,2%	18,7%	0,1%	15,2%	7,5%	4,5%	10,0%	43,8%
SECOND QUINTILE	24	13.296	0,1%	13,9%	0,3%	13,9%	1,8%	11,9%	16,3%	41,8%
THIRD QUINTILE	57	12.804	0,1%	11,8%	0,7%	14,0%	2,3%	7,0%	13,3%	50,8%
FOURTH QUINTILE	182	4.065	0,6%	11,9%	1,1%	15,6%	3,3%	7,6%	15,1%	44,8%
FIFTH QUINTILE	8247	89	0,4%	23,0%	0,4%	22,6%	10,8%	5,9%	14,1%	22,8%
<b>TOTAL</b>	<b>8519</b>	<b>431</b>	<b>0,3%</b>	<b>15,8%</b>	<b>0,5%</b>	<b>16,2%</b>	<b>5,1%</b>	<b>7,4%</b>	<b>13,8%</b>	<b>40,8%</b>



Source: Nielsen

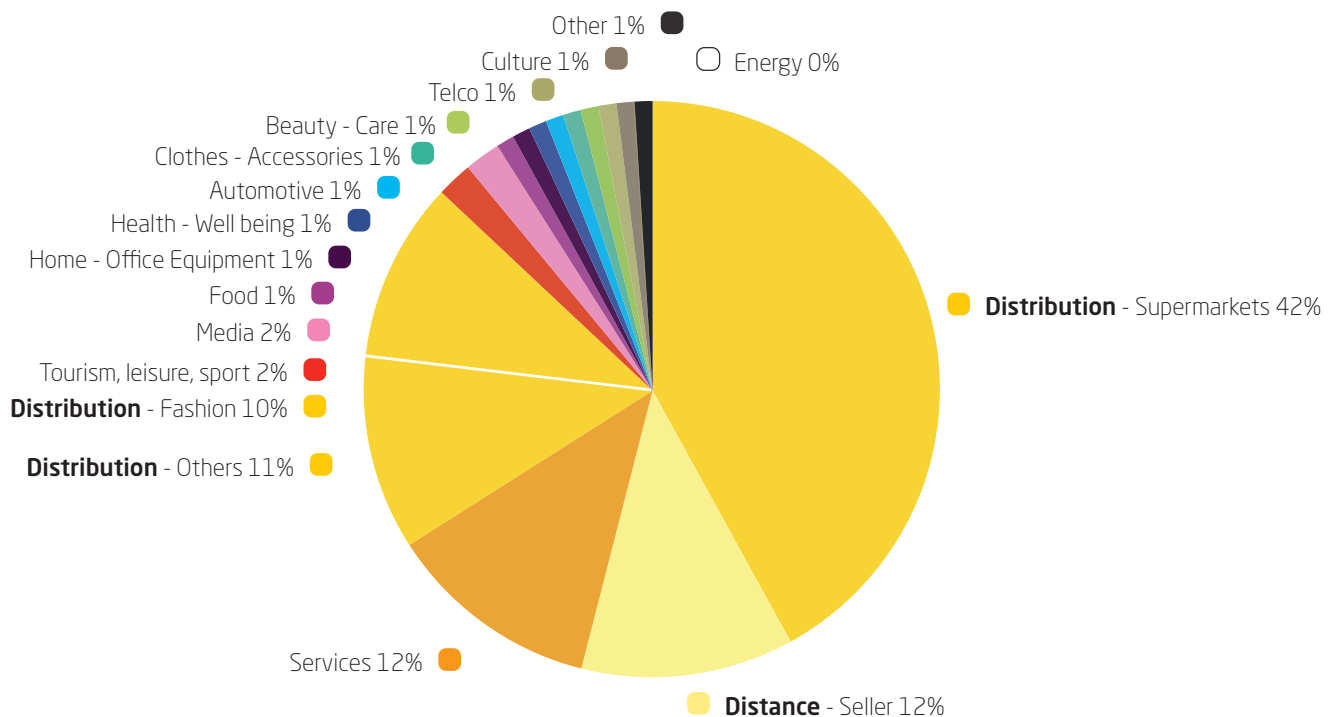
## 6. Number of advertisers per medium type

The same strong concentration can also be observed when comparing the number of advertisers per medium type.

2020		FIRST QUINTILE	SECOND QUINTILE	THIRD QUINTILE	FOURTH QUINTILE	FIFTH QUINTILE	TOTAL
<b>PLURIMEDIA</b>	<b>NUMBER OF ADVERTISERS</b>	<b>9</b>	<b>24</b>	<b>57</b>	<b>182</b>	<b>8.247</b>	<b>8.519</b>
<b>CINEMA</b>	NUMBER OF ADVERTISERS	1	1	2	14	109	<b>127</b>
	SOV	28,4%	14,7%	16,2%	21,5%	19,2%	<b>100,0%</b>
<b>DAILIES</b>	NUMBER OF ADVERTISERS	3	12	38	160	2.134	<b>2.347</b>
	SOV	20,2%	19,5%	20,3%	20,0%	20,0%	<b>100,0%</b>
<b>FREE SHEETS</b>	NUMBER OF ADVERTISERS	2	3	3	7	92	<b>107</b>
	SOV	20,0%	23,2%	16,6%	20,3%	19,9%	<b>100,0%</b>
<b>INTERNET</b>	NUMBER OF ADVERTISERS	6	19	52	138	5.158	<b>5.373</b>
	SOV	20,5%	19,1%	20,5%	19,9%	20,0%	<b>100,0%</b>
<b>MAGAZINES</b>	NUMBER OF ADVERTISERS	2	13	62	212	1.958	<b>2.247</b>
	SOV	25,7%	14,3%	20,0%	20,0%	20,0%	<b>100,0%</b>
<b>OUT OF HOME</b>	NUMBER OF ADVERTISERS	5	9	15	43	569	<b>641</b>
	SOV	19,8%	20,0%	20,0%	20,3%	19,9%	<b>100,0%</b>
<b>RADIO</b>	NUMBER OF ADVERTISERS	9	13	30	76	965	<b>1.093</b>
	SOV	21,3%	18,5%	20,4%	19,8%	20,0%	<b>100,0%</b>
<b>TV</b>	NUMBER OF ADVERTISERS	6	16	32	75	825	<b>954</b>
	SOV	19,3%	20,7%	19,8%	20,1%	20,1%	<b>100,0%</b>

## 7. Direct mail in Belgium: 2020 key figures

According to the Nielsen estimates, gross investments in Direct Mail amounted to **236,2 million euros** in 2020. That represents a **decrease of 15,4%**, a consequence of the Covid period. This development represents a decrease of 15%, in line with the evolution of offline investments. In this context, the share of the DM media remained stable in 2020 (in the Nielsen offline universe).



Unsurprisingly, the decline was less pronounced for the sectors of supermarkets and distance sales. Overall, the retail sector concentrated around 75% of gross investments in 2020.

	2019	2020		DIFF 2020/2019	EVOL GROSS
	IN kEURO	IN kEURO	IN %	IN %	IN kEURO
DISTRIBUTION-SUPERMARKETS	102.485	98.507	42%	-4% ●	-3.978
DISTANCE SELLER	32.336	29.484	12%	-9% ●	-2.852
SERVICES	37.650	29.429	12%	-22% ●	-8.220
DISTRIBUTION-OTHERS	31.410	25.213	11%	-20% ●	-6.197
DISTRIBUTION-FASHION	34.585	23.234	10%	-33% ●	-11.350
TOURISM, LEISURE, SPORT	9.470	5.416	2%	-43% ●	-4.054
MEDIA	4.643	4.499	2%	-3% ●	-144
FOOD	3.549	3.251	1%	-8% ●	-298
HOME-OFFICE EQUIPMENT	4.940	3.202	1%	-35% ●	-1.738
HEALTH-WELL BEING	2.409	2.627	1%	9% ●	218
AUTOMOTIVE	3.631	2.035	1%	-44% ●	-1.595
CLOTHES-ACCESSORIES	2.714	2.018	1%	-26% ●	0
BEAUTY-CARE	2.613	1.772	1%	-32% ●	0
TELCO	1.890	1.703	1%	-10% ●	0
CULTURE	2.526	1.322	1%	-48% ●	-1.204
ENERGY	0	473	0%	-5% ●	-24
OTHER	1.976	2.003	1%	1% ●	28
<b>GRAND TOTAL</b>	<b>279.323</b>	<b>236.189</b>	<b>100%</b>	<b>-15% ●</b>	<b>-43.133</b>

Source: Nielsen

## **Important remark regarding the measurement of online advertisement spend by Nielsen:**

The analyses of media spend are based on the gross rates of the media measured by Nielsen. Up to and including December 2016 internet investments were declared to Nielsen by the agencies who were a member of the DMA: a limited list of Belgian websites and only investments in display direct sales advertisements. In 2017 Nielsen introduced a crawling system. This method offers the advantage of also measuring investments on websites that are not a member of the DMA. For instance, YouTube was added to the study (for the video & display part). This crawling methodology does not allow the measurement of password-protected platforms (as Facebook) meaning that the current figures reflect a portion only of actual total digital spends and is grossly underestimated. As a result, no accurate and reliable data on gross online media spend are currently available. Hence, any comparisons of trended data should be made with much care and should potentially be limited to offline media spend, especially on detailed level. On behalf of the advertisers, UBA is urgently requesting that accurate data on digital investments be made available as soon as possible.

However, there was a growing demand from the market to not only provide an evolution of gross figures but also to provide a better insight into the net evolution of investments as well as, specifically, the evolution of the split between offline and online budgets. Hence the initiatives of UBA based on a survey among its members, BAM (survey) and the UMA (based on net media spend via the UMA members) to monitor both the evolution of net media spend and the online-offline split. And even though the results are not identical, the initiatives clearly establish that the market share of online is considerably higher than suggested by the gross figures.

## **UBA researched online net spending in Belgium**

Under the protection of a strict non-disclosure agreement, the survey queried the participating advertisers on their net advertisement investment in terms of offline and online media. The survey only asked for details regarding online investments.

A total of 39 advertisers, who together invested a net sum of €332 million in media investments in 2019, took part in the study. Although the survey did not cover the market in its entirety, the number of participants and the sectors represented still allow us to draw a series of relevant conclusions. According to Nielsen's MDB figures the survey represented 16% of the total Belgian advertising market in 2019.

In 2019 the participating advertisers spent 36% of their budget on online media as opposed to 31% in 2018. In euro this means a growth of 21% of absolute investments in the online media market.

41% of online investment went to Google (SEA, Google Display Network and YouTube), 22% was spent on Facebook (incl. Instagram). Around 4% was invested in large foreign groups not associated with the two aforementioned American giants. Think of social media like Twitter or Pinterest.

The remaining 33% of the available budget went to Belgian online media, 22% of which is still spent on display ads. The fact that display as a touchpoint accounts for such a large market share is quite remarkable, especially when compared to the 7% in online video and 4% in native advertising.



**Taking brands further**

## **UBA (UNITED BRANDS ASSOCIATION)**

UBA is the belgian organisation made by brands, made for brands. The UBA community of members currently counts 353 brand builders who are strengthened and supported by UBA Expertise Partners. This makes the UBA a unique platform for promoting the interests of brands and exchanging knowledge. With a wide range of activities and services, UBA promotes a creative, innovative and transparent communication ecosystem as a breeding ground for strong, sustainable brands. UBA's activities and services are consistently based on four strategic principles: inspire, influence, facilitate and connect. These principles guarantee a relevant service that makes brand builders stronger.

**[www.ubabelgium.be](http://www.ubabelgium.be)**