



space

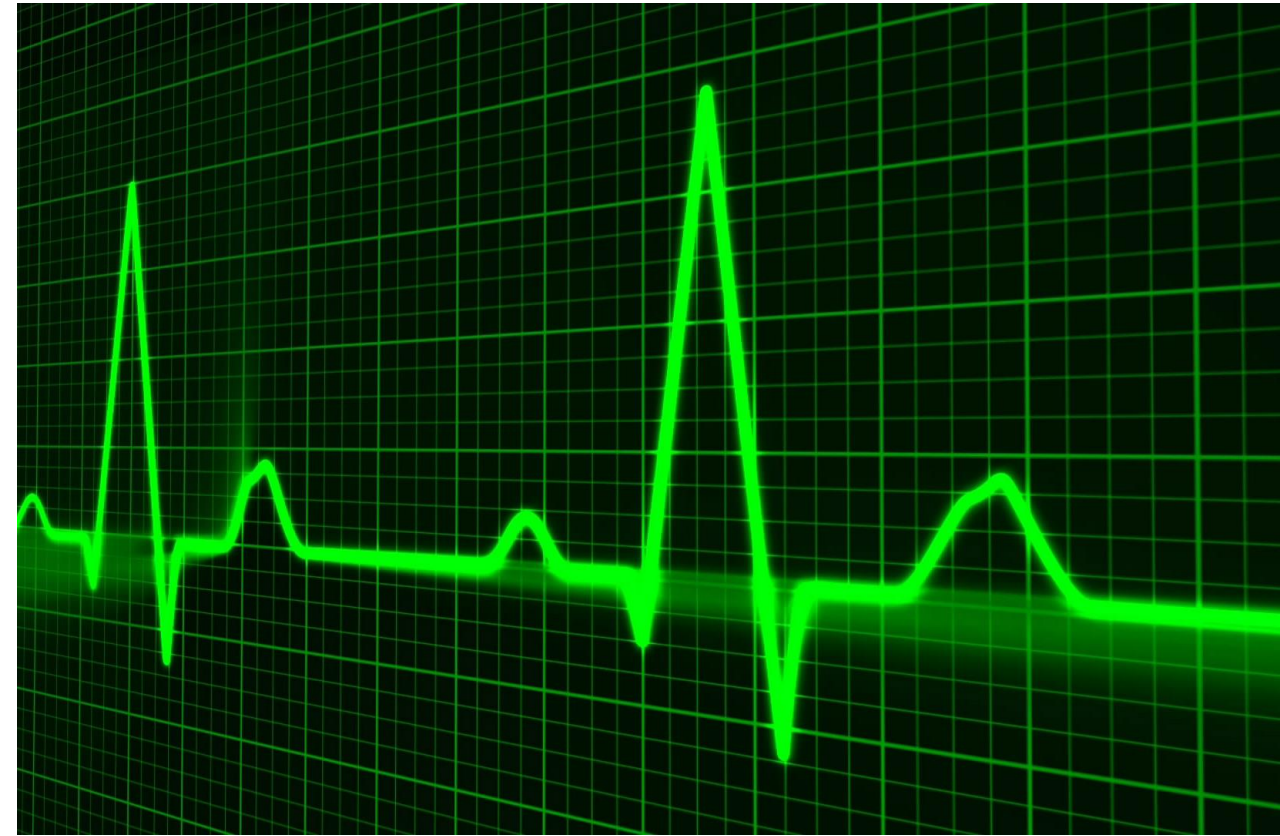
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

February 2021



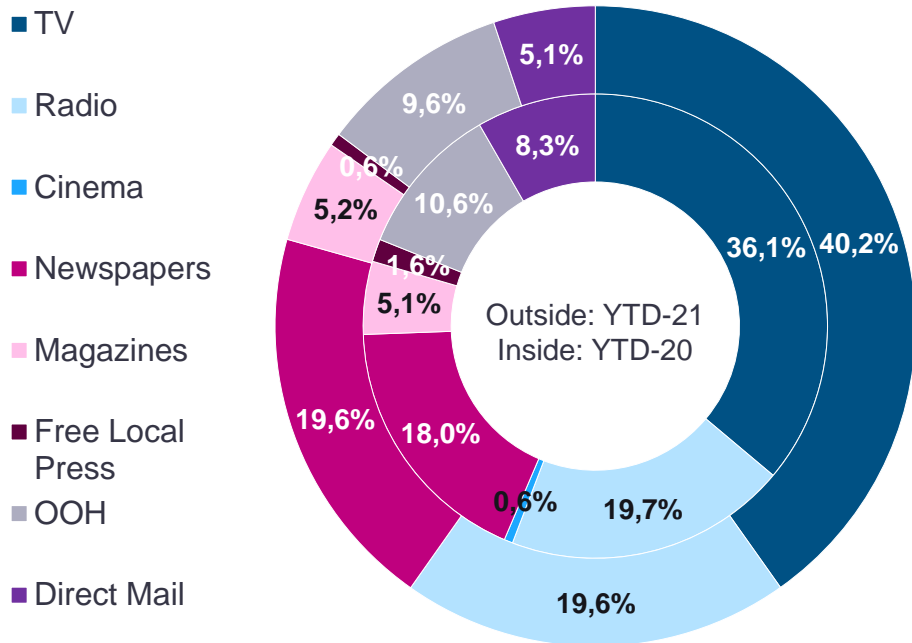
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - January 2021

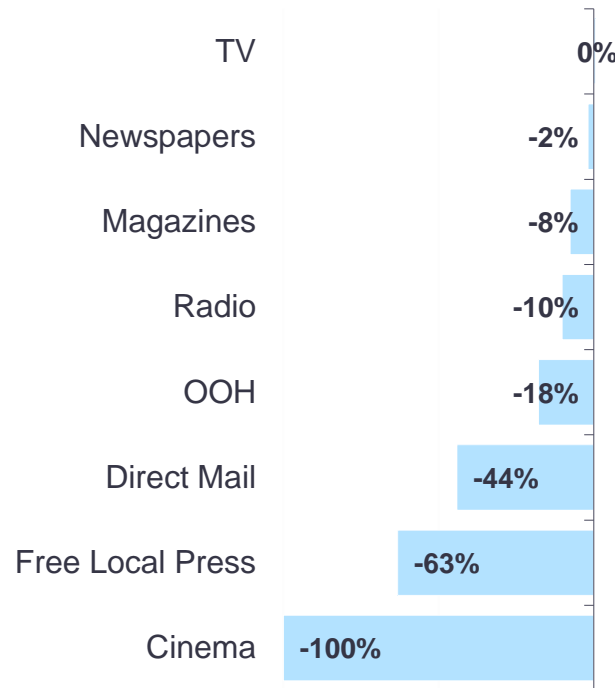
NB : No Internet figures in MDB for 2020 & 2021

| Market | National | North | South |
|---|-------------------------|------------------------|-------------------------|
| <ul style="list-style-type: none"> € Mo vs YTD-20 % Region | 245,1 - 9,7% 100% | 144,1 - 8,5% 60% | 101,0 - 11,4% 40% |

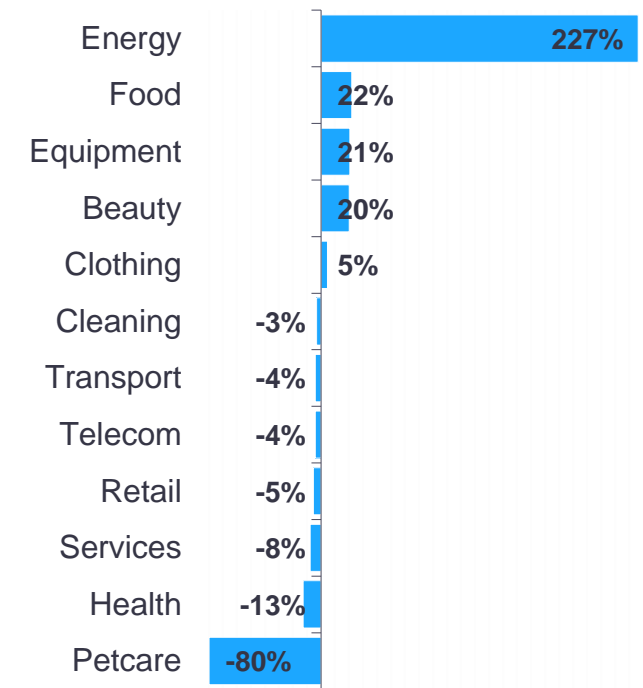
Media Mix Evol.



Media Evol. (vs YTD-20)



EcoGroups Evol. (vs YTD-20)



MDB TOP 30 ADVERTISERS - January 2021

NB : No Internet figures in MDB for 2020 & 2021

| Rank | ADV.GROUP | Gross Inv. | vs 2020 |
|------|-------------------------|------------|---------|
| 1 | D'IETEREN GROUP | 11,1 | ↓ 95 |
| 2 | COLRUYT GROUP | 9,4 | ↑ 122 |
| 3 | PSA GROUPE | 8,2 | ↓ 90 |
| 4 | PROCTER & GAMBLE | 8,0 | ↑ 123 |
| 5 | RENAULT-NISSAN ALLIANCE | 6,8 | ↓ 82 |
| 6 | AHOLD DELHAIZE | 5,3 | ↑ 128 |
| 7 | THE COCA-COLA COMPANY | 4,2 | ↑ 315 |
| 8 | BMW GROUP BELGIUM | 3,8 | ↑ 188 |
| 9 | PROXIMUS GROUP | 3,2 | ↑ 119 |
| 10 | TELENET GROUP HOLDING | 3,1 | ↑ 120 |
| 11 | JAGUAR LAND ROVER BELUX | 2,7 | ↓ 98 |
| 12 | VINTED | 2,5 | ↑ 111 |
| 13 | FORD MOTOR COMPANY | 2,4 | ↑ 156 |
| 14 | TOYOTA BELGIUM | 2,4 | ↑ 406 |
| 15 | RECKITT & BENCKISER | 2,3 | ↑ 117 |

| Rank | ADV.GROUP | Gross Inv. | vs 2020 |
|------|---------------------------|------------|---------|
| 16 | ENGIE | 2,2 | ↑ 6966 |
| 17 | ORANGE | 2,0 | ↓ 56 |
| 18 | NETHYS | 1,9 | ↓ 83 |
| 19 | DAIMLER BENZ GROUP | 1,8 | ↑ 186 |
| 20 | GEELY SWEDEN AB | 1,8 | ↑ 143 |
| 21 | UNILEVER | 1,8 | ↑ 235 |
| 22 | FIAT CHRYSLER AUTOMOBILES | 1,8 | ↓ 64 |
| 23 | AGEAS | 1,7 | ↑ 562 |
| 24 | ALCOPA | 1,6 | ↓ 88 |
| 25 | PEPSICO | 1,6 | ↑ 118 |
| 26 | L'OREAL GROUP | 1,5 | ↑ 158 |
| 27 | METRO GROUPE | 1,5 | ↑ 110 |
| 28 | LOTERIE NATIONALE | 1,5 | ↓ 75 |
| 29 | GROUPE 3 SUISSES | 1,4 | ↓ 77 |
| 30 | HELLOFRESH | 1,3 | ↑ 175 |



Key TV figures

Key TV figures North - Feb-21

| CHANNEL | CHANNEL'S MARKETING TARGET | RATING (%) 17:00-23:00 | | AUDIENCE SHARE (%) 17:00-23:00 | | C/GRP (€ - no commission) Total Day | |
|----------|----------------------------------|---------------------------|------|-----------------------------------|------|--|----------------|
| | | Feb-21 | YTD | Feb-21 | YTD | Feb-21 | YTD |
| VTM | PRP 18-54 | 7,2 | 6,8 | 26,5 | 24,3 | 657 | 685 |
| VTM2 | PRP 18-44 | 1,5 | 1,5 | 6,6 | 6,2 | 883 | 795 |
| VTM3 | PRP 18-54 | 1,1 | 1,2 | 4,0 | 4,2 | 611 | 576 |
| VTM4 | MEN 18-54 | 0,6 | 0,6 | 2,5 | 2,8 | <i>Package</i> | <i>Package</i> |
| Play4 | PRP 18-54 | 3,0 | 3,3 | 11,0 | 11,7 | 1.051 | 789 |
| Play5 | PRP 18-54 | 1,3 | 1,3 | 4,7 | 4,5 | 972 | 840 |
| Play6 | PRP 18-54 | 0,6 | 0,6 | 2,3 | 2,3 | <i>Package</i> | <i>Package</i> |
| Total TV | PRP 18-54 | 27,3 | 27,9 | | | | |
| Total TV | PRP 18-44 | 23,1 | 23,9 | | | | |
| Total TV | MEN 18-54 | 22,1 | 22,7 | | | | |

Key TV indexes North - Feb-21

| CHANNEL | MARKETING TARGET | RATING vs P-1 17:00-23:00 | | AUDIENCE SHARE vs P-1 17:00-23:00 | | C/GRP vs Channel's Objective | |
|----------|------------------|---------------------------------|-------|---|-------|---------------------------------|---------|
| | | Feb-21 | YTD | Feb-21 | YTD | Feb-21 | YTD |
| | | | | | | | |
| VTM | PRP 18-54 | ↑ 102 | ↘ 99 | ↑ 105 | ↓ 98 | ✓ 99 | ✗ 107 |
| VTM2 | PRP 18-44 | ↓ 94 | ↓ 90 | ↘ 99 | ↓ 90 | ✗ 109 | ✗ 108 |
| VTM3 | PRP 18-54 | ↓ 85 | ↓ 89 | ↓ 88 | ↓ 88 | ✗ 111 | ✗ 109 |
| VTM4 | MEN 18-54 | → 100 | ↑ 116 | ↑ 104 | ↑ 118 | Package | Package |
| Play4 | PRP 18-54 | ↘ 99 | ↑ 118 | ↑ 102 | ↑ 118 | ✗ 136 | ✗ 109 |
| Play5 | PRP 18-54 | ↓ 72 | ↓ 77 | ↓ 75 | ↓ 76 | ✗ 153 | ✗ 141 |
| Play6 | PRP 18-54 | ↓ 87 | ↑ 108 | ↓ 91 | ↑ 109 | Package | Package |
| Total TV | PRP 18-54 | ↓ 97 | → 100 | | | | |
| Total TV | PRP 18-44 | ↓ 95 | → 100 | | | | |
| Total TV | MEN 18-54 | ↓ 95 | ↓ 98 | | | | |

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Feb - Targetgroup: ALL 18-54

Source: CIM TV - Live +6 including guests (2015) / Live +7 including guests (2016+)

| Variable | Channel | Daypart | YTD-17 | YTD-18 | YTD-19 | YTD-20 | 21 vs 20 |
|--|------------------------------------|-----------|--------|--------|--------|--------------|----------|
| Rating (%) | TSU (Total Screen Usage) (1) | 17-23:00 | 31,9% | 31,5% | 30,8% | 33,0% | 107 |
| Audience share TSU (%) (2) | Total channels (Live + TSV) | " | 83,8% | 82,0% | 80,4% | 73,8% | 92 |
| | VHS + DVD player + Blu-Ray | " | 3,7% | 2,5% | 2,1% | 2,6% | 125 |
| | Video on demand + Digital recorder | " | 11,1% | 13,6% | 16,1% | 22,2% | 138 |
| | Game console and other devices (3) | " | 1,5% | 1,9% | 1,4% | 1,3% | 92 |
| % Time shift viewing (4) | All Channels | " | 24,3% | 30,0% | 31,1% | 32,1% | 103 |
| | Main Channels (5) | " | 26,5% | 32,8% | 33,2% | 35,7% | 107 |
| Commercial breaks rating vs full daypart rating Index | Main channels (5) - Live | " | 87 | 88 | 85 | 84 | |
| | Main channels (5) - TSV | " | 34 | 34 | 37 | 37 | |
| ATV (Average daily viewing time) in minutes | All TV channels (Live) | Total day | 117 | 105 | 101 | 93 | 92 |
| | All TV channels (TSV) | " | 32 | 36 | 36 | 37 | 102 |
| | All TV channels (Live + TSV) | " | 149 | 142 | 137 | 130 | 95 |
| | Other TV Screen Usage | " | 38 | 41 | 43 | 60 | 137 |
| | Total TV Screen Usage | " | 187 | 183 | 181 | 190 | 105 |

Key TV figures South - Feb-21

| CHANNEL | CHANNEL'S MARKETING TARGET | RATING (%) 17:00-23:00 | | AUDIENCE SHARE (%) 17:00-23:00 | | C/GRP (€ - with comm.) Total Day | |
|----------|----------------------------------|---------------------------|------|-----------------------------------|------|-------------------------------------|-----|
| | | Feb-21 | YTD | Feb-21 | YTD | Feb-21 | YTD |
| RTL-TVI | PRP 18-54 | 6,6 | 6,5 | 26,7 | 26,2 | 757 | 700 |
| Club-RTL | MEN 18-54 | 1,2 | 1,1 | 6,0 | 5,5 | 752 | 674 |
| Plug-RTL | ALL 15-34 | 0,7 | 0,6 | 5,8 | 5,1 | 549 | 637 |
| TF1 | PRP 18-54 | 3,0 | 3,1 | 11,9 | 12,4 | 567 | 536 |
| La Une | PRP 18-54 | 4,2 | 4,2 | 16,8 | 16,9 | 579 | 549 |
| Tipik | PRP 18-54 | 1,3 | 1,3 | 5,2 | 5,4 | 560 | 551 |
| AB3 | PRP 18-44 | 1,1 | 1,1 | 5,6 | 5,6 | 655 | 664 |
| TTV | PRP 18-54 | 24,9 | 25,0 | | | | |
| TTV | PRP 18-44 | 19,1 | 19,2 | | | | |
| TTV | ALL 15-34 | 12,6 | 12,6 | | | | |
| TTV | MEN 18-54 | 19,2 | 19,3 | | | | |

Key TV indexes South - Feb-21

| CHANNEL | MARKETING TARGET | RATING vs P-1 17:00-23:00 | | AUDIENCE SHARE vs P-1 17:00-23:00 | | C/GRP vs Channel's Objective | |
|----------|------------------|------------------------------|-------|--------------------------------------|-------|------------------------------|-------|
| | | Feb-21 | YTD | Feb-21 | YTD | Feb-21 | YTD |
| RTL-TV1 | PRP 18-54 | ↑ 106 | ↑ 105 | ↑ 110 | ↑ 108 | ✗ 115 | ✗ 113 |
| Club-RTL | MEN 18-54 | ↓ 85 | ↓ 88 | ↓ 83 | ↓ 86 | ! 101 | ✓ 97 |
| Plug-RTL | ALL 15-34 | ↔ 101 | ↓ 88 | ↑ 118 | ↑ 102 | ✓ 79 | ✓ 98 |
| TF1 | PRP 18-54 | ↓ 85 | ↓ 93 | ↓ 88 | ↓ 96 | ✗ 106 | ✗ 106 |
| La Une | PRP 18-54 | ↑ 110 | ↑ 110 | ↑ 114 | ↑ 113 | ! 101 | ✓ 99 |
| Tipik | PRP 18-54 | ↓ 85 | ↓ 88 | ↓ 89 | ↓ 91 | ✗ 113 | ✗ 114 |
| AB3 | PRP 18-44 | ↓ 52 | ↓ 51 | ↓ 61 | ↓ 59 | ✗ 125 | ✗ 131 |
| TTV | PRP 18-54 | ↓ 96 | ↓ 97 | | | | |
| TTV | PRP 18-44 | ↓ 85 | ↓ 87 | | | | |
| TTV | ALL 15-34 | ↓ 86 | ↓ 86 | | | | |
| TTV | MEN 18-54 | ↔ 101 | ↑ 102 | | | | |

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Feb - Targetgroup: ALL 18-54

Source: CIM TV - Live +6 including guests (2015) / Live +7 including guests (2016+)

| Variable | Channel | Daypart | YTD-17 | YTD-18 | YTD-19 | YTD-20 | 21 vs 20 |
|--|------------------------------------|-----------|--------|--------|--------|--------------|----------|
| Rating (%) | TSU (Total Screen Usage) (1) | 17-23:00 | 35,5% | 34,5% | 33,4% | 34,3% | 103 |
| Audience share TSU (%) (2) | Total channels (Live + TSV) | " | 76,0% | 73,6% | 67,7% | 64,9% | 96 |
| | VHS + DVD player + Blu-Ray | " | 6,8% | 6,1% | 3,6% | 3,9% | 107 |
| | Video on demand + Digital recorder | " | 16,4% | 19,3% | 27,3% | 30,4% | 111 |
| | Game console and other devices (3) | " | 0,8% | 1,1% | 1,4% | 0,8% | 61 |
| % Time shift viewing (4) | All Channels | " | 20,0% | 21,5% | 24,2% | 27,6% | 114 |
| | Main Channels (5) | " | 21,6% | 22,3% | 24,7% | 28,7% | 116 |
| Commercial breaks rating vs full daypart rating Index | Main channels (5) - Live | " | 88 | 89 | 91 | 90 | |
| | Main channels (5) - TSV | " | 49 | 54 | 51 | 55 | |
| ATV (Average daily viewing time) in minutes | All TV channels (Live) | Total day | 146 | 134 | 116 | 107 | 93 |
| | All TV channels (TSV) | " | 29 | 30 | 30 | 33 | 108 |
| | All TV channels (Live + TSV) | " | 175 | 164 | 146 | 140 | 96 |
| | Other TV Screen Usage | " | 63 | 69 | 80 | 88 | 111 |
| | Total TV Screen Usage | " | 238 | 233 | 226 | 229 | 101 |



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Feb-21

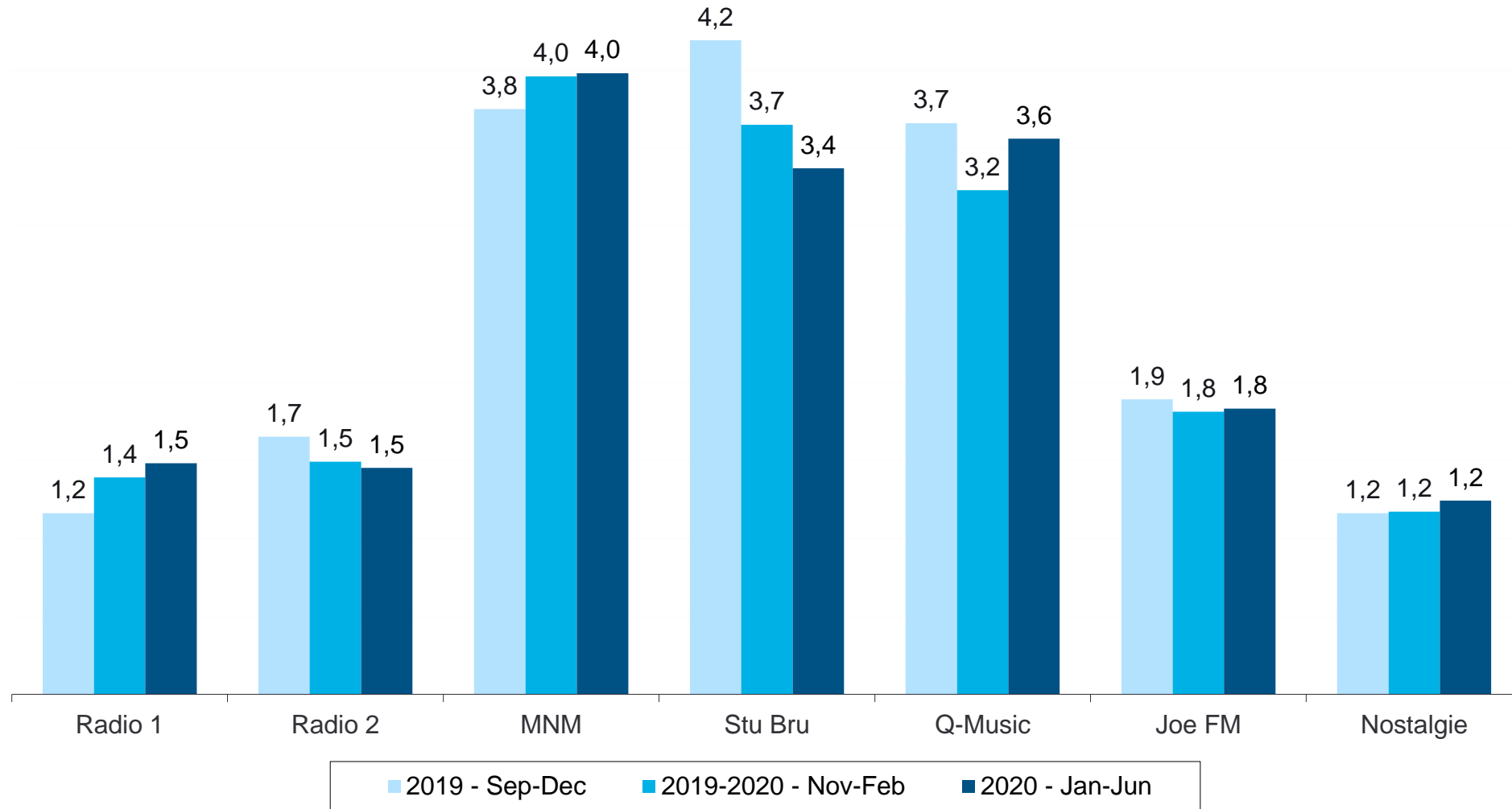
| Rank | Website | Monthly Net Reach # | Rank | Website | Monthly Net Reach # |
|------|-------------------------|---------------------|------|---------------------|---------------------|
| 1 | HLN.be | 3.191.244 | 11 | Knack/Le Vif | 1.534.932 |
| 2 | Nieuwsblad | 2.862.888 | 12 | La Libre.be | 1.461.096 |
| 3 | VRT | 2.545.956 | 13 | De Standaard | 1.438.332 |
| 4 | Sudinfo | 2.080.176 | 14 | De Morgen | 1.360.548 |
| 5 | RTBF.be | 2.072.112 | 15 | L'Avenir.net | 1.331.988 |
| 6 | DH.be | 1.904.700 | 16 | Flair | 1.225.560 |
| 7 | 2dehands.be/2ememain.be | 1.873.536 | 17 | 7sur7.be | 1.158.192 |
| 8 | RTL.be | 1.719.732 | 18 | Een | 1.111.656 |
| 9 | Immoweb | 1.669.668 | 19 | Gazet van Antwerpen | 1.082.172 |
| 10 | Le Soir | 1.640.772 | 20 | Vlan.be | 1.078.644 |



Key Radio figures

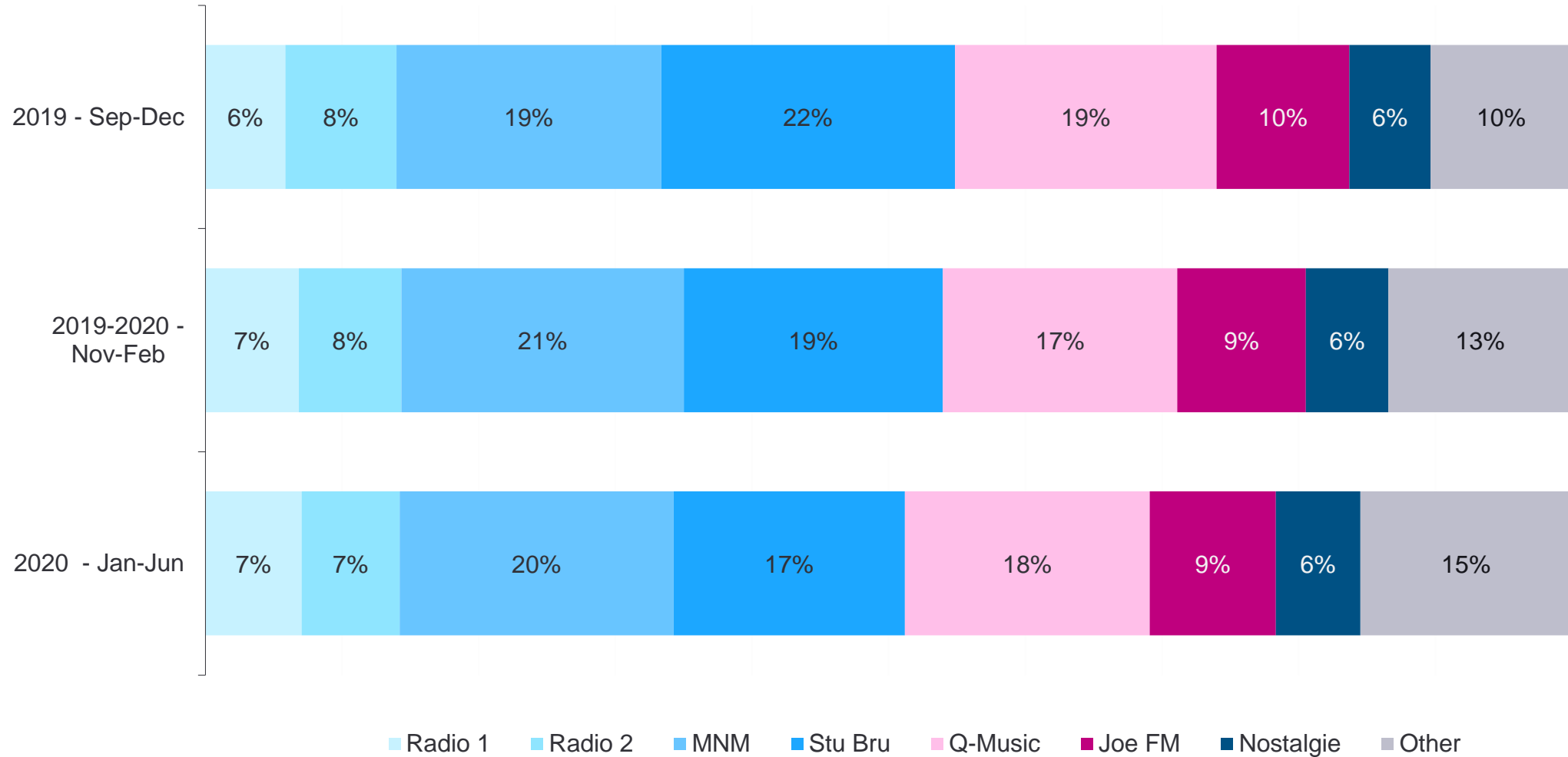
KEY RADIO FIGURES NORTH

Average break rating (%) on ALL 18-44 - 07:00-19:00



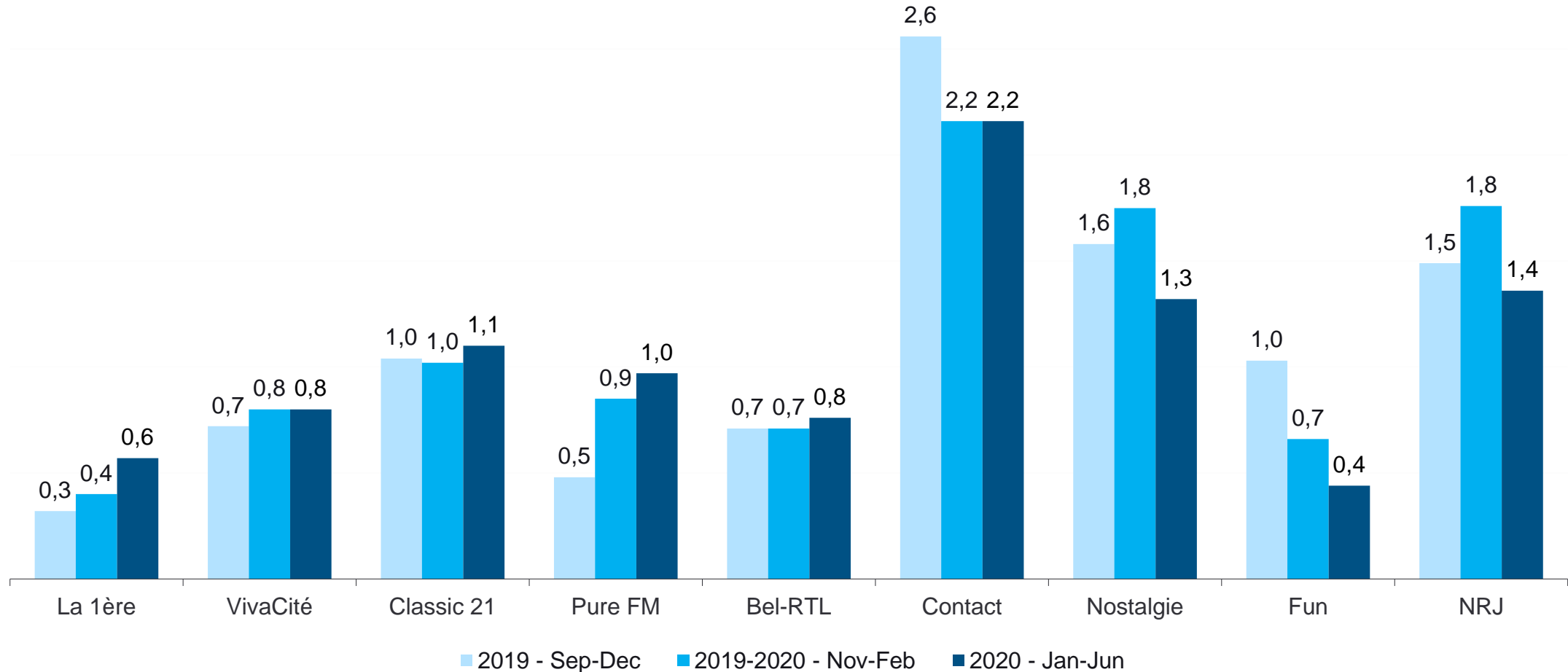
KEY RADIO FIGURES NORTH

Audience Shares (%) on ALL 18-44 - 07:00-19:00



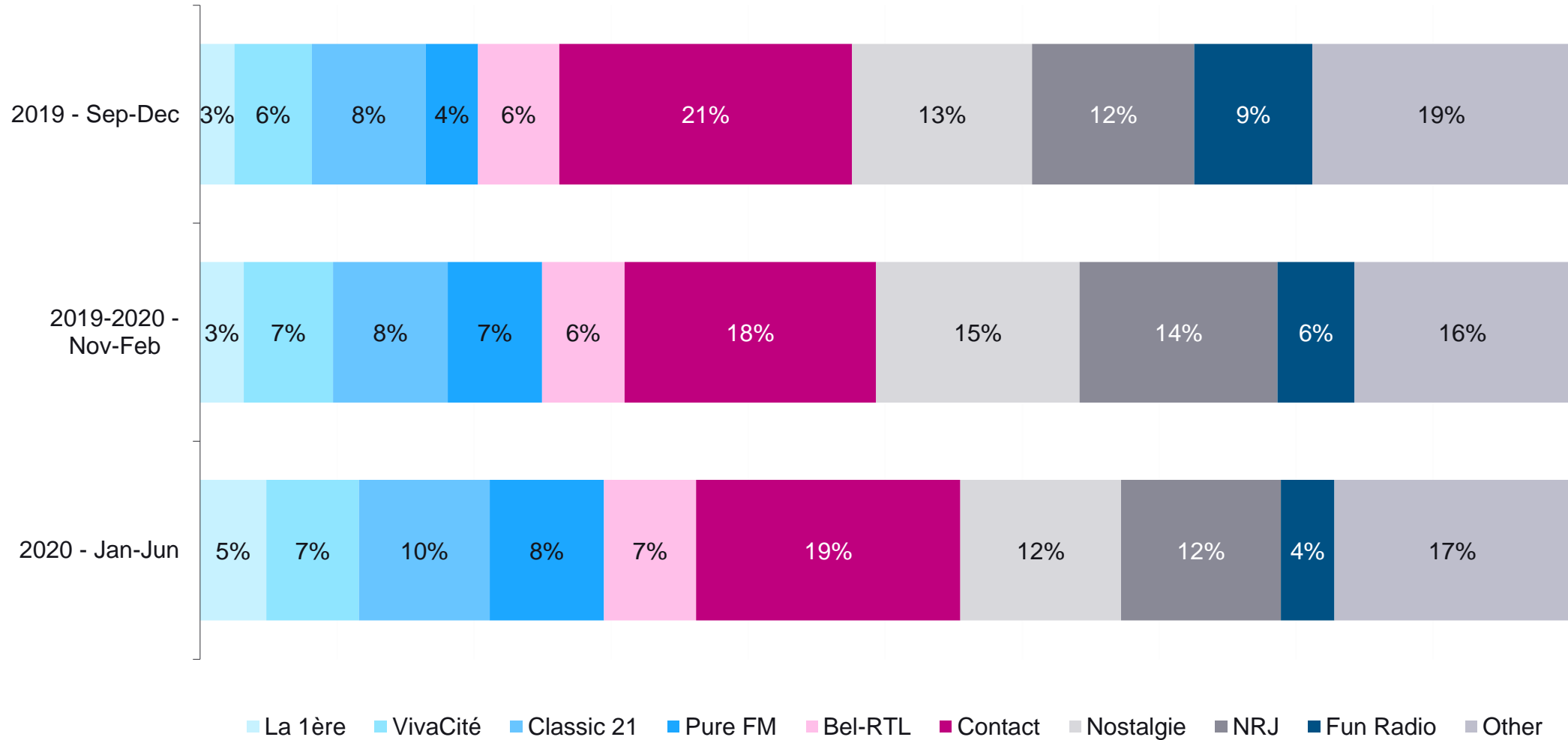
KEY RADIO FIGURES SOUTH

Average break rating (%) on ALL 18-44 - 07:00-19:00



KEY RADIO FIGURES SOUTH

Audience Shares (%) on ALL 18-44 - 07:00-19:00





Print Circulation

Key Print Figures - Newspapers/Magazines circulation

Print Circulation:

Number of copies sold/given
on an average issue.
Yearly delivery.
“Cim-authenticated” datas.
Includes digital sales.

Key Print Figures - Newspapers Circulation - Year 2019 (Paid + Free - digital sales included)

| NORTH | Circulation | vs 2018 | Digital Part | vs 2018 |
|------------------------|----------------|-------------|--------------|--------------|
| Het Laatste Nieuws | 242.109 | ↓ 94 | 11% | ↑ 129 |
| Het Nieuwsblad | 211.209 | ↓ 96 | 8% | ↑ 119 |
| De Standaard | 104.352 | → 100 | 30% | ↑ 118 |
| Het Belang van Limburg | 86.450 | ↓ 97 | 11% | ↑ 132 |
| Gazet van Antwerpen | 76.500 | ↓ 94 | 12% | ↑ 134 |
| De Morgen | 47.507 | ↓ 92 | 40% | ↑ 110 |
| De Tijd | 45.877 | ↑ 104 | 46% | ↑ 107 |
| Total North | 814.004 | ↓ 96 | 17% | ↑ 120 |

| SOUTH | Circulation | vs 2018 | Digital Part | vs 2018 |
|--------------------|----------------|--------------|--------------|--------------|
| L'Avenir | 75.284 | ↓ 97 | 12% | ↑ 112 |
| Sud Presse | 73.253 | → 100 | 17% | ↑ 173 |
| Le Soir | 61.353 | ↑ 107 | 32% | ↑ 174 |
| La Libre Belgique | 37.563 | ↑ 106 | 30% | ↑ 133 |
| La DH | 34.992 | ↓ 95 | 17% | ↑ 129 |
| L'Echo | 16.684 | ↑ 102 | 50% | ↑ 108 |
| Grenz Echo | 9.575 | ↓ 97 | 8% | ↑ 124 |
| Total South | 308.704 | → 100 | 22% | ↑ 142 |

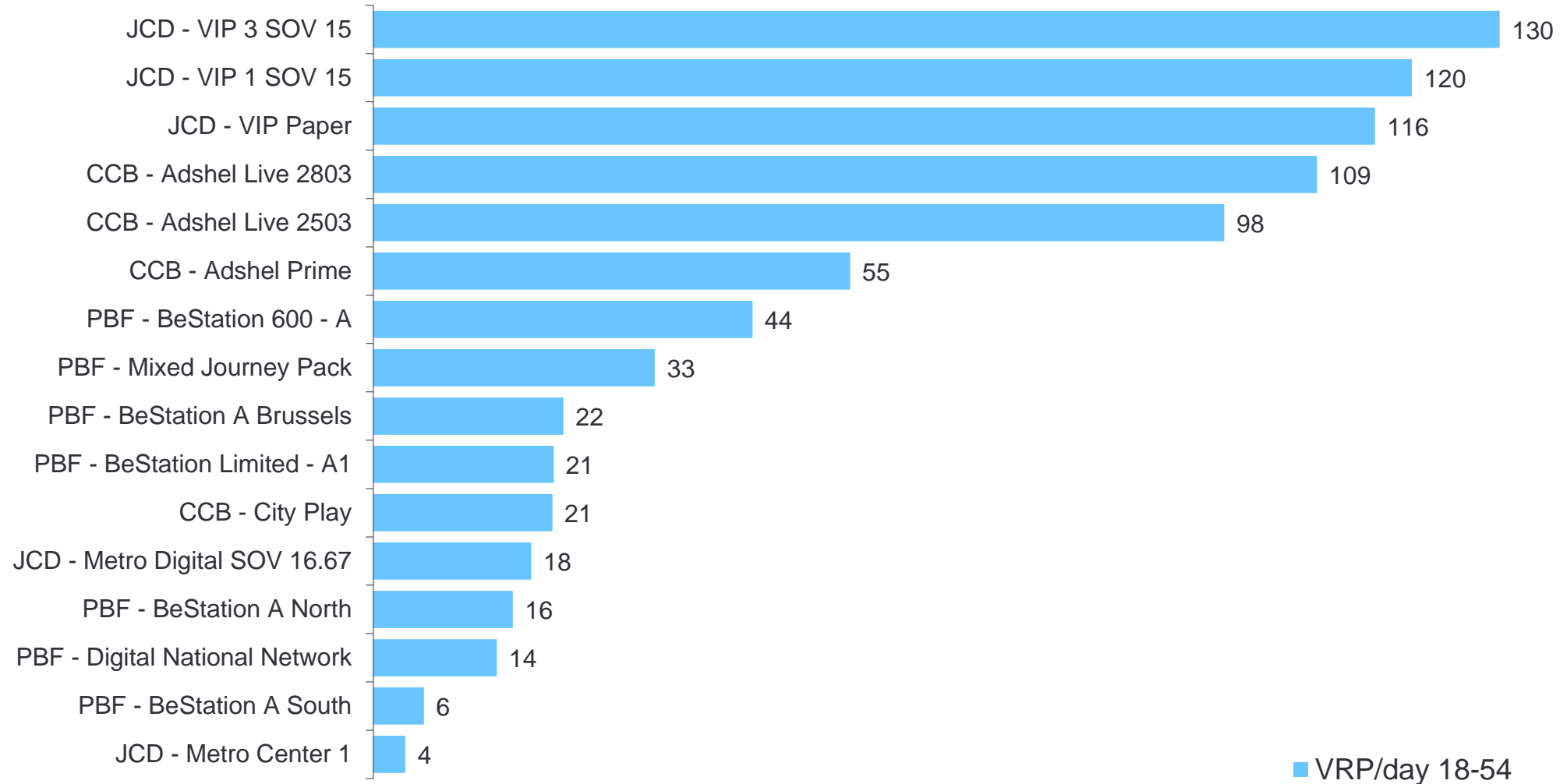
Key Print Figures - Magazines Circulation - Year 2019 (Paid + Free - digital sales included)

| Categories | NL-speaking | | FR-speaking | | Both languages | | TOTAL | |
|---------------------------|------------------|-------------|----------------|-------------|----------------|-------------|------------------|-------------|
| | Circulation | vs 2018 | Circulation | vs 2018 | Circulation | vs 2018 | Circulation | vs 2018 |
| Television | 596.815 | ↓ 95 | 372.411 | ↓ 93 | | | 969.226 | ↓ 94 |
| Women | 334.431 | ↓ 96 | 152.069 | ↓ 90 | | | 486.500 | ↓ 94 |
| Business & News | 105.604 | ↑ 103 | 131.699 | ↓ 97 | 51.359 | ↓ 88 | 288.662 | ↓ 97 |
| Generation (Youth/Senior) | | | 14.572 | ↓ 93 | 119.560 | ↓ 98 | 134.132 | ↓ 97 |
| Build & Deco | 47.684 | ↓ 95 | 26.668 | ↓ 99 | 28.186 | ↓ 74 | 102.538 | ↓ 89 |
| Men | 28.770 | ↓ 87 | 14.844 | ↓ 91 | 31.110 | ↓ 71 | 74.724 | ↓ 80 |
| TOTAL | 1.113.304 | ↓ 96 | 712.263 | ↓ 93 | 230.215 | ↓ 88 | 2.055.782 | ↓ 94 |



Out Of Home Ratings

OOH Ratings - Street furniture & Stations VRP's* per day (National) on ALL 18-54



■ VRP/day 18-54

OOH Ratings - Panoramic & Classic billboards VRP's* per day (National) on ALL 18-54

