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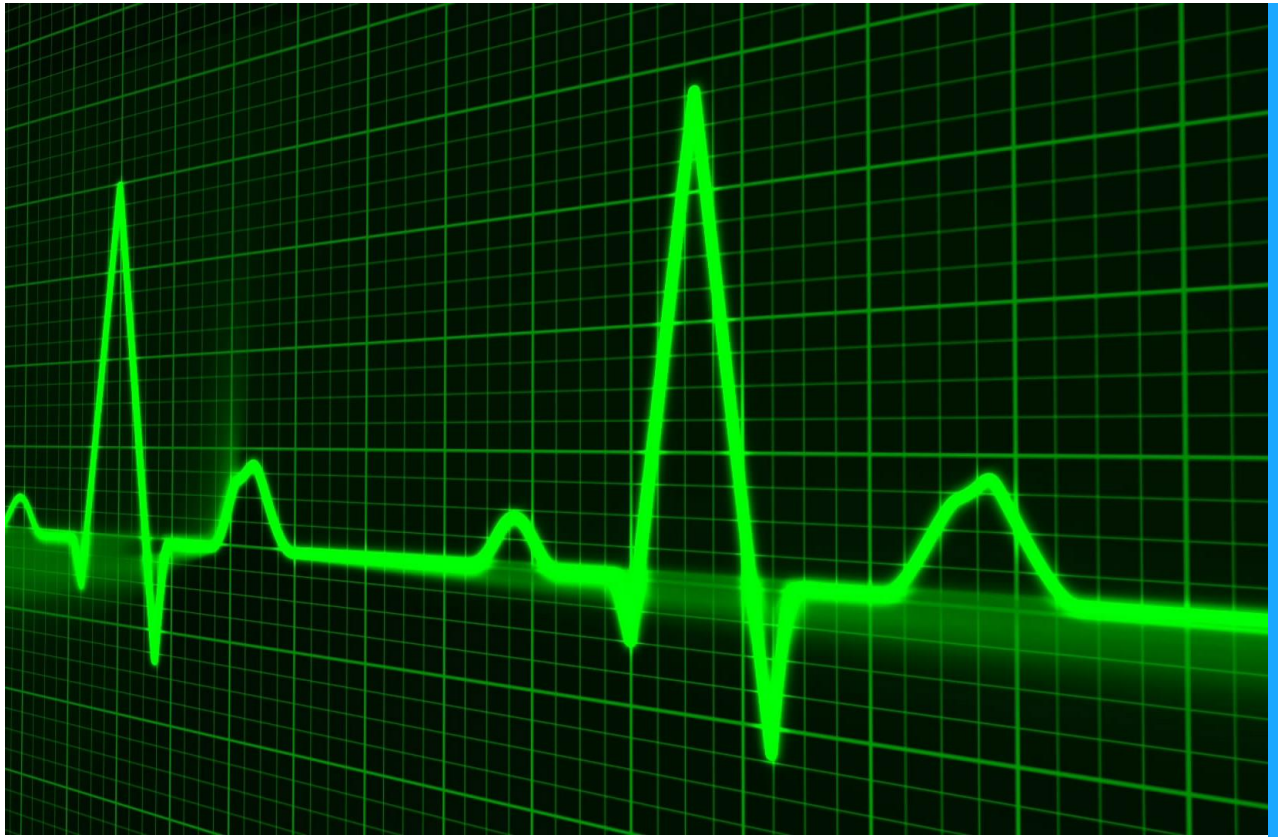
intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

December 2020



Gross Media Investments Evolution

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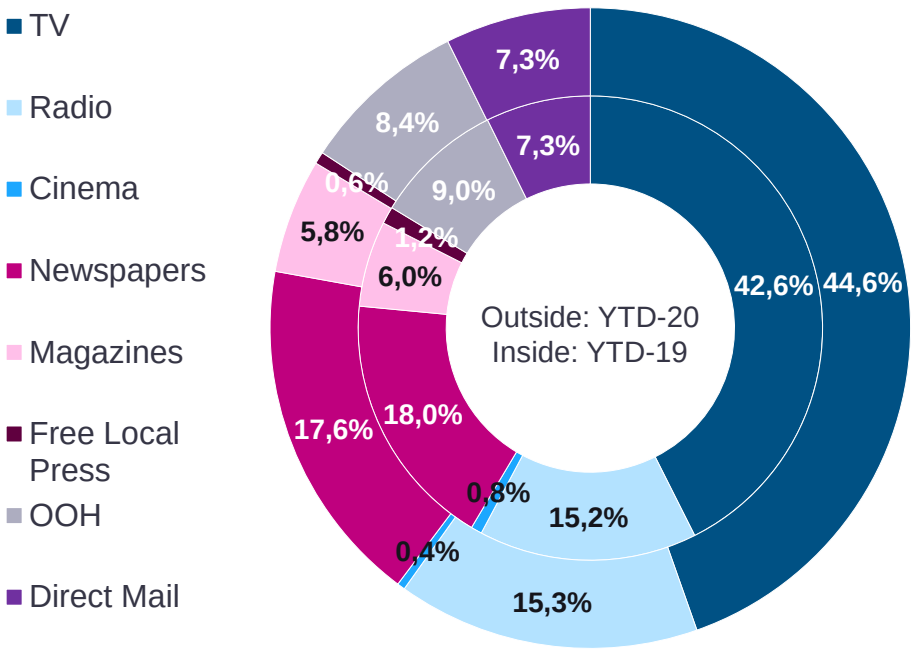
GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Nov 2020

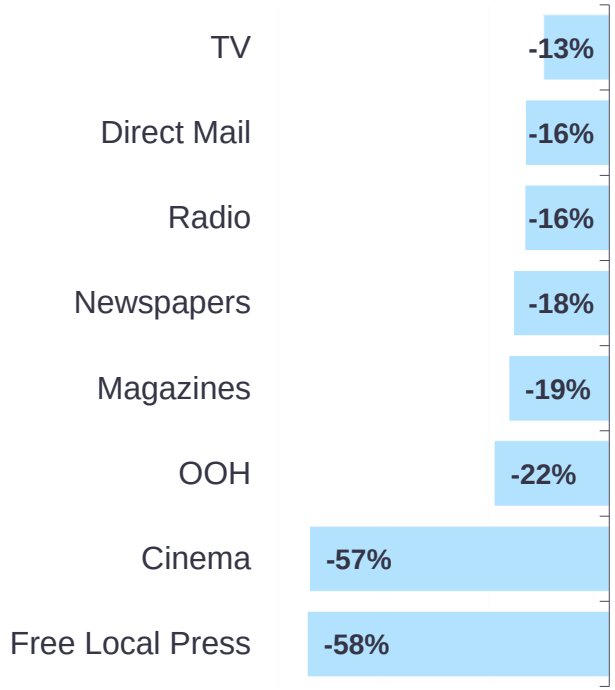
NB : No Internet figures in MDB for 2019 & 2020

Market	National	North	South
▪ € Mo ▪ vs YTD-19 ▪ % Region	2.929,0 - 16,5% 100%	1.772,0 - 17,2% 60,5%	1.157,0 - 15,4% 39,5%

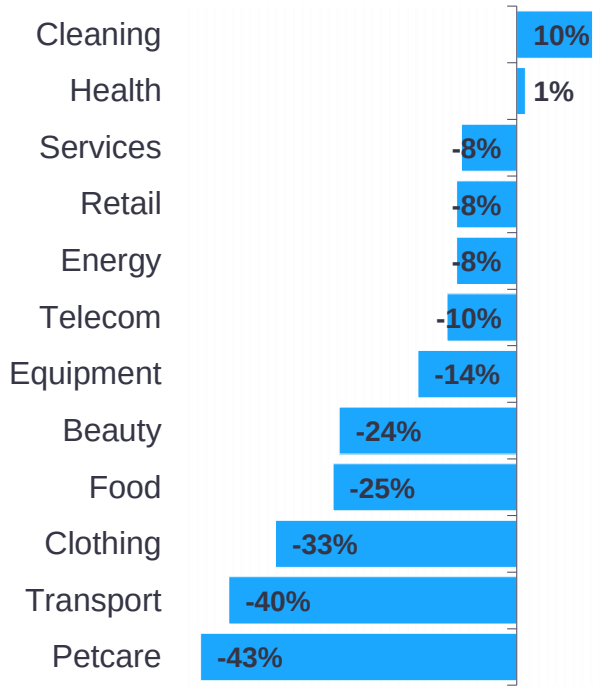
Media Mix Evol.



Media Evol. (vs YTD-19)



EcoGroups Evol. (vs YTD-19)



Source: MDB/Nielsen (Gross ratecard value)

MDB TOP 30 ADVERTISERS - Jan-Nov 2020

NB : No Internet figures in MDB for 2019 & 2020

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
1	COLRUYT GROUP	118,1	126
2	PROCTER & GAMBLE	102,1	99
3	AHOLD DELHAIZE	63,8	138
4	RECKITT & BENCKISER	42,3	89
5	THE COCA-COLA COMPANY	39,1	57
6	UNILEVER	39,1	81
7	TELENET GROUP HOLDING	37,2	105
8	PROXIMUS GROUP	33,6	73
9	ALDI	32,5	141
10	ORANGE	30,3	84
11	D'IETEREN GROUP	29,0	46
12	LOTERIE NATIONALE	27,8	121
13	CARREFOUR GROUP	26,2	78
14	NESTLE GROUP	25,3	155
15	PSA GROUPE	25,2	47

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
16	NETHYS	24,6	97
17	FERRERO	23,4	62
18	RENAULT-NISSAN ALLIANCE	22,8	65
19	LIDL & CO	22,5	124
20	L'OREAL GROUP	22,0	79
21	AS WATSON	22,0	118
22	PEPSICO	21,7	140
23	THE WALT DISNEY COMPANY	21,7	88
24	VINTED	21,4	69
25	GROUPE 3 SUISSES	19,5	105
26	BEIERSDORF	19,1	105
27	MONDELEZ INTERNATIONAL	18,6	88
28	BMW GROUP BELGIUM	18,1	98
29	HENKEL	16,5	171
30	AXA GROUP	16,1	126

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Source: MDB / Nielsen
Gross investments in € Mo (only commercial companies, internet not included)

Key TV figures

Key TV figures North - Dec-20

CHANNEL	CHANNEL's MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Dec-20	YTD	Dec-20	YTD	Dec-20	YTD
VTM	PRP 18-54	7,2	7,2	23,6	25,9	1.085	886
VTM2	PRP 18-44	1,3	1,6	4,8	6,8	1.310	969
VTM3	PRP 18-54	1,3	1,2	4,2	4,2	537	636
VTM4	MEN 18-54	0,7	0,6	3,0	2,5	*Package*	*Package*
VIER	PRP 18-54	4,0	3,3	13,2	11,9	1.129	1.009
VIJF	PRP 18-54	1,4	1,4	4,5	5,1	779	817
ZES	PRP 18-54	0,4	0,6	1,4	2,1	*Package*	*Package*
Total TV	PRP 18-54	30,4	27,8				
Total TV	PRP 18-44	26,6	24,2				
Total TV	MEN 18-54	24,7	23,0				

Source: CIM TV - Live +7 including guests

Key TV indexes North - Dec-20

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	
		Dec-20	YTD	Dec-20	YTD	Dec-20	YTD
VTM	PRP 18-54	104	113	95	108	122	100
VTM2	PRP 18-44	79	103	71	97	158	117
VTM3	PRP 18-54	86	86	79	82	74	87
VTM4	MEN 18-54	140	119	133	111	*Package*	*Package*
VIER	PRP 18-54	114	98	104	93	112	104
VIJF	PRP 18-54	100	97	91	93	95	103
ZES	PRP 18-54	102	107	94	100	*Package*	*Package*
Total TV	PRP 18-54	109	105				
Total TV	PRP 18-44	111	106				
Total TV	MEN 18-54	104	105				

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Source: CIM TV - Live +7 including guests

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Dec - 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	20 vs 19
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	28,7%	28,3%	28,2%	**31,2%**	111
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	85,4%	82,8%	81,3%	**78,8%**	97
	VHS + DVD player + Blu-Ray	"	4,0%	3,5%	2,5%	**2,4%**	97
	Video on demand + Digital recorder	"	9,4%	12,1%	14,6%	**17,5%**	120
	Game console and other devices (3)	"	1,3%	1,6%	1,7%	**1,4%**	82
% Time shift viewing (4)	All Channels	"	23,7%	25,9%	29,2%	**32,5%**	111
	Main Channels (5)	"	26,6%	30,2%	33,0%	**36,4%**	111
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	86	86	85	**84**	
	Main channels (5) - TSV	"	31	34	35	**36**	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	108	103	97	**99**	102
	All TV channels (TSV)	"	29	30	32	**38**	117
	All TV channels (Live + TSV)	"	137	133	129	**137**	106
	Other TV Screen Usage	"	31	36	38	**49**	127
	Total TV Screen Usage	"	169	169	167	**185**	111

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(1) : Total Screen Usage = Live + TSV + Guest viewing (since 2013) + Other Screen Usage, (2) : as % of total screen usage rating, (3) : camera, PC, etc..., (4) : as % of total channels viewing (guests included), (5) : Main channels = VTM + Q2 + Vitaya + VIER + VIJF

Key TV figures South - Dec-20

CHANNEL	CHANNEL's MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Dec-20	YTD	Dec-20	YTD	Dec-20	YTD
RTL-TVI	PRP 18-54	6,9	6,9	26,8	27,1	1.155	790
Club-RTL	MEN 18-54	1,1	1,0	5,2	5,3	1.335	1.123
Plug-RTL	ALL 15-34	0,6	0,6	4,1	4,4	1.108	727
TF1	PRP 18-54	3,2	3,3	12,5	13,0	946	607
La Une	PRP 18-54	4,1	3,9	15,9	15,3	789	678
Tipik	PRP 18-54	1,5	1,4	5,7	5,3	676	649
AB3	PRP 18-44	1,3	1,5	6,7	7,2	794	701
TTV	PRP 18-54	25,7	25,6				
TTV	PRP 18-44	20,2	21,2				
TTV	ALL 15-34	14,4	14,3				
TTV	MEN 18-54	20,5	19,0				

Source: CIM TV - Live +7 including guests

Key TV indexes South - Dec-20

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	
		Dec-20	YTD	Dec-20	YTD	Dec-20	YTD
RTL-TVI	PRP 18-54	112	107	115	107	140	100
Club-RTL	MEN 18-54	80	76	74	78	154	133
Plug-RTL	ALL 15-34	120	111	128	115	149	98
TF1	PRP 18-54	97	111	99	112	138	92
La Une	PRP 18-54	110	107	113	107	116	103
Tipik	PRP 18-54	92	99	94	99	108	103
AB3	PRP 18-44	47	66	52	68	112	107
TTV	PRP 18-54	98	100				
TTV	PRP 18-44	91	98				
TTV	ALL 15-34	93	97				
TTV	MEN 18-54	108	98				

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Source: CIM TV - Live +7 including guests

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Dec - 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	20 vs 19
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	32,8%	31,6%	31,2%	**33,6%**	108
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	78,0%	75,1%	71,3%	**67,1%**	94
	VHS + DVD player + Blu-Ray	"	6,9%	6,2%	4,7%	**4,1%**	87
	Video on demand + Digital recorder	"	14,3%	17,9%	22,6%	**27,6%**	122
	Game console and other devices (3)	"	0,8%	0,8%	1,4%	**1,2%**	85
% Time shift viewing (4)	All Channels	"	18,8%	20,3%	22,1%	**24,3%**	110
	Main Channels (5)	"	20,3%	20,7%	22,6%	**24,6%**	109
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	84	87	**88**	
	Main channels (5) - TSV	"	51	52	50	**51**	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	140	128	121	**117**	96
	All TV channels (TSV)	"	27	26	28	**30**	109
	All TV channels (Live + TSV)	"	167	154	149	**147**	99
	Other TV Screen Usage	"	55	60	69	**85**	125
	Total TV Screen Usage	"	222	214	218	**233**	107

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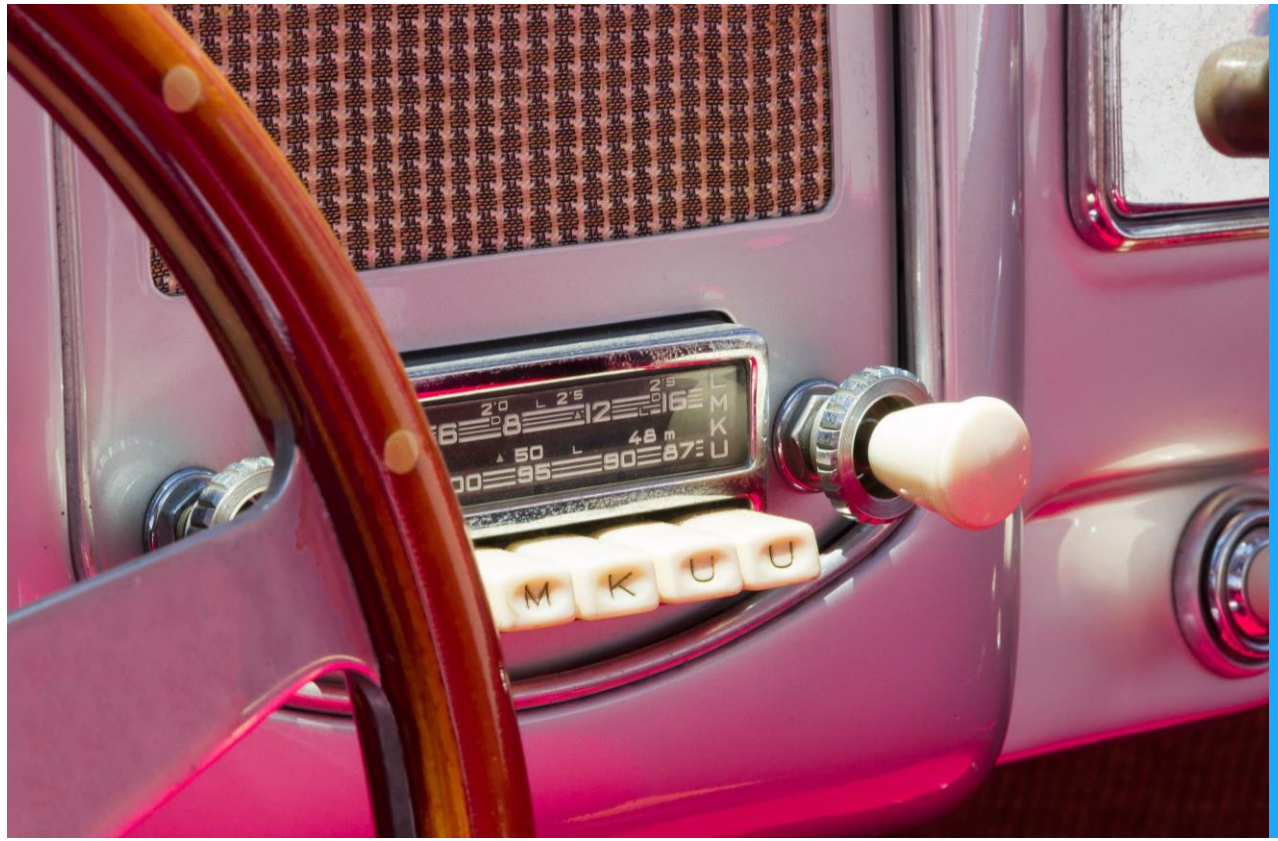
(1) : Total Screen Usage = Live + TSV + Guest viewing (since 2013) + Other Screen Usage (2) : as % of total screen usage rating (3) : camera, PC, etc…
(4) : as % of total channels viewing (guests included) (5) : Main channels = La Une + La Deux + AB3 + RTL-TVI + Club-RTL + Plug-RTL

Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Dec-20

Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.363.276	11	De Standaard	1.596.756
2	Nieuwsblad	2.978.220	12	De Morgen	1.520.316
3	VRT	2.705.640	13	Immoweb	1.497.552
4	Sudinfo	2.391.312	14	L'Avenir.net	1.451.772
5	RTBF.be	2.382.660	15	La Libre.be	1.420.356
6	RTL.be	2.115.204	16	Flair	1.383.816
7	2dehands.be/2ememain.be	2.044.140	17	Een	1.299.984
8	DH.be	2.033.388	18	Metrotime	1.212.456
9	Knack/Le Vif	1.888.824	19	7sur7.be	1.183.812
10	Le Soir	1.820.952	20	Gazet van Antwerpen	1.170.456

Source: CIM internet



Key Radio figures

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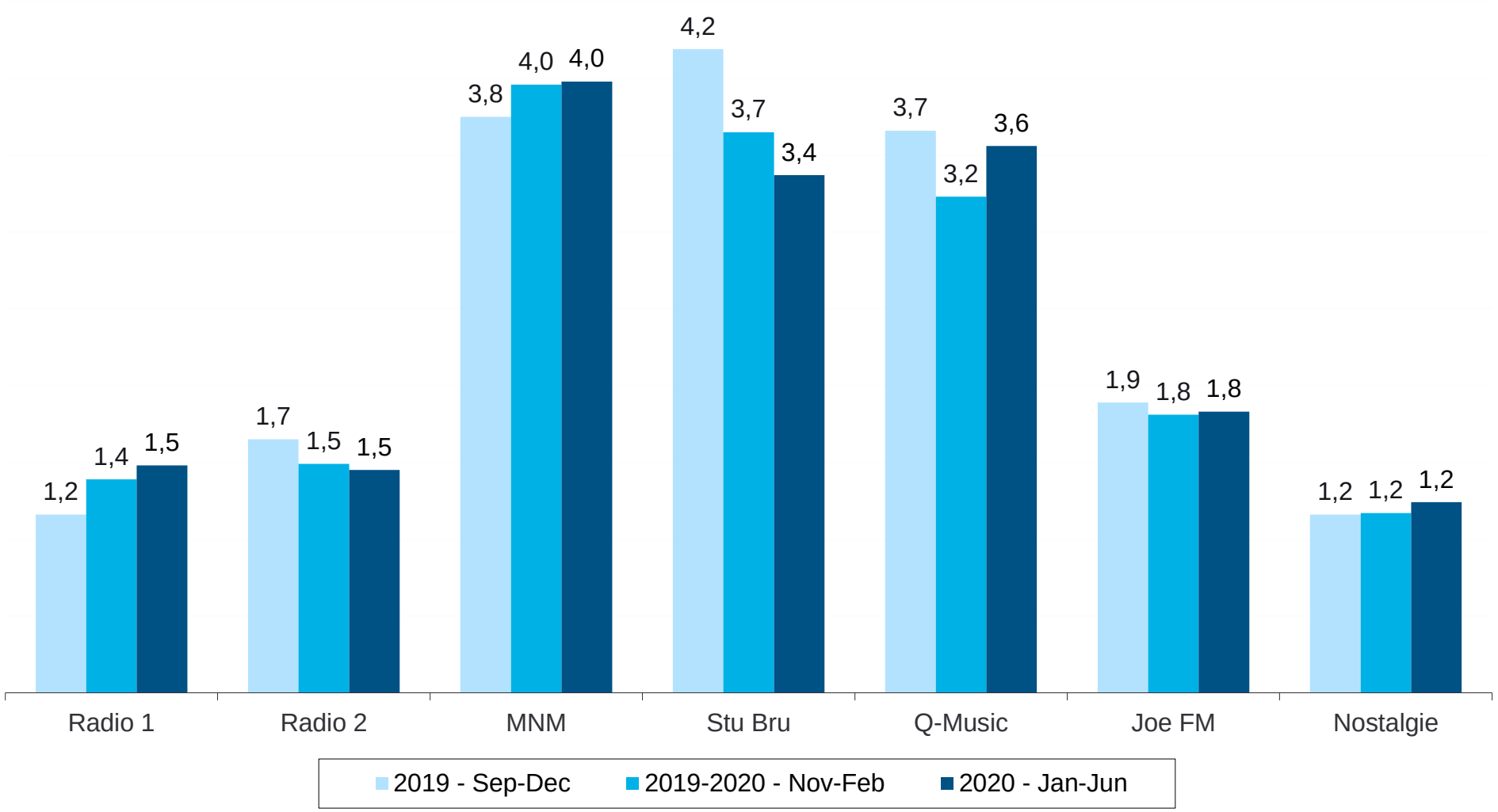
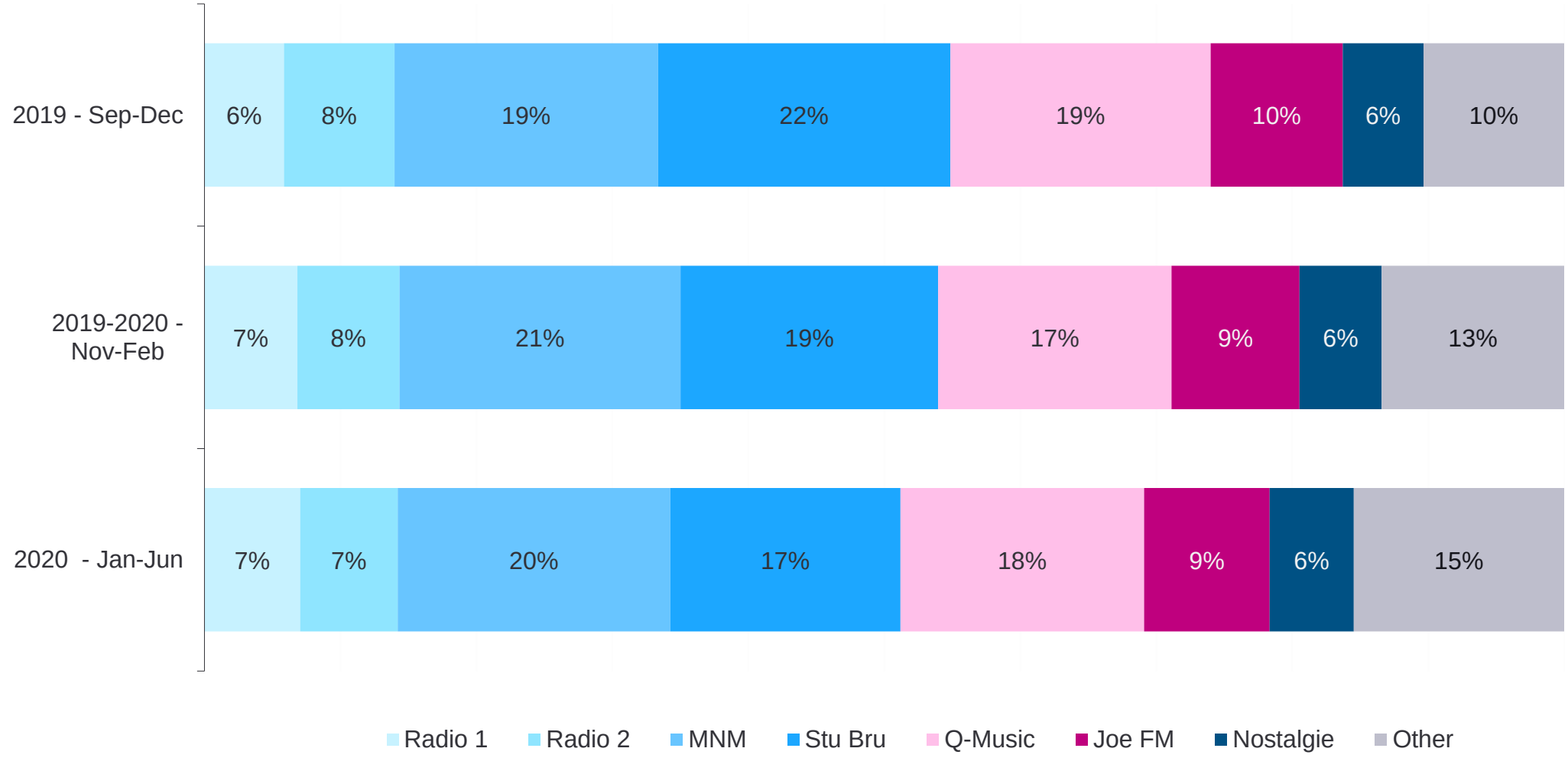
KEY RADIO FIGURES NORTH
Average break rating (%) on ALL 18-44 - 07:00-19:00



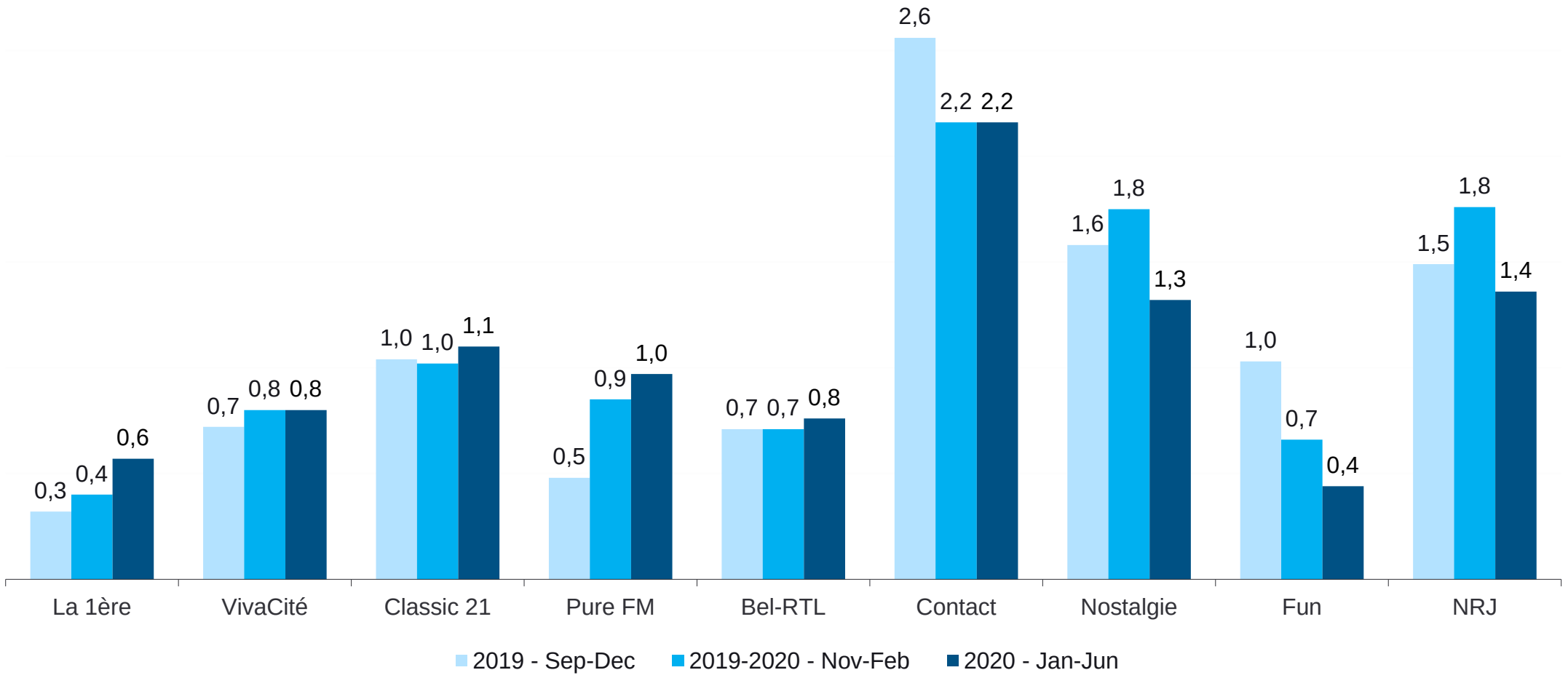
Source: CIM RAM
NB: CIM Rule - Any media planning processing must be carried out on the cumulative data of the last three waves

KEY RADIO FIGURES NORTH
Audience Shares (%) on ALL 18-44 - 07:00-19:00



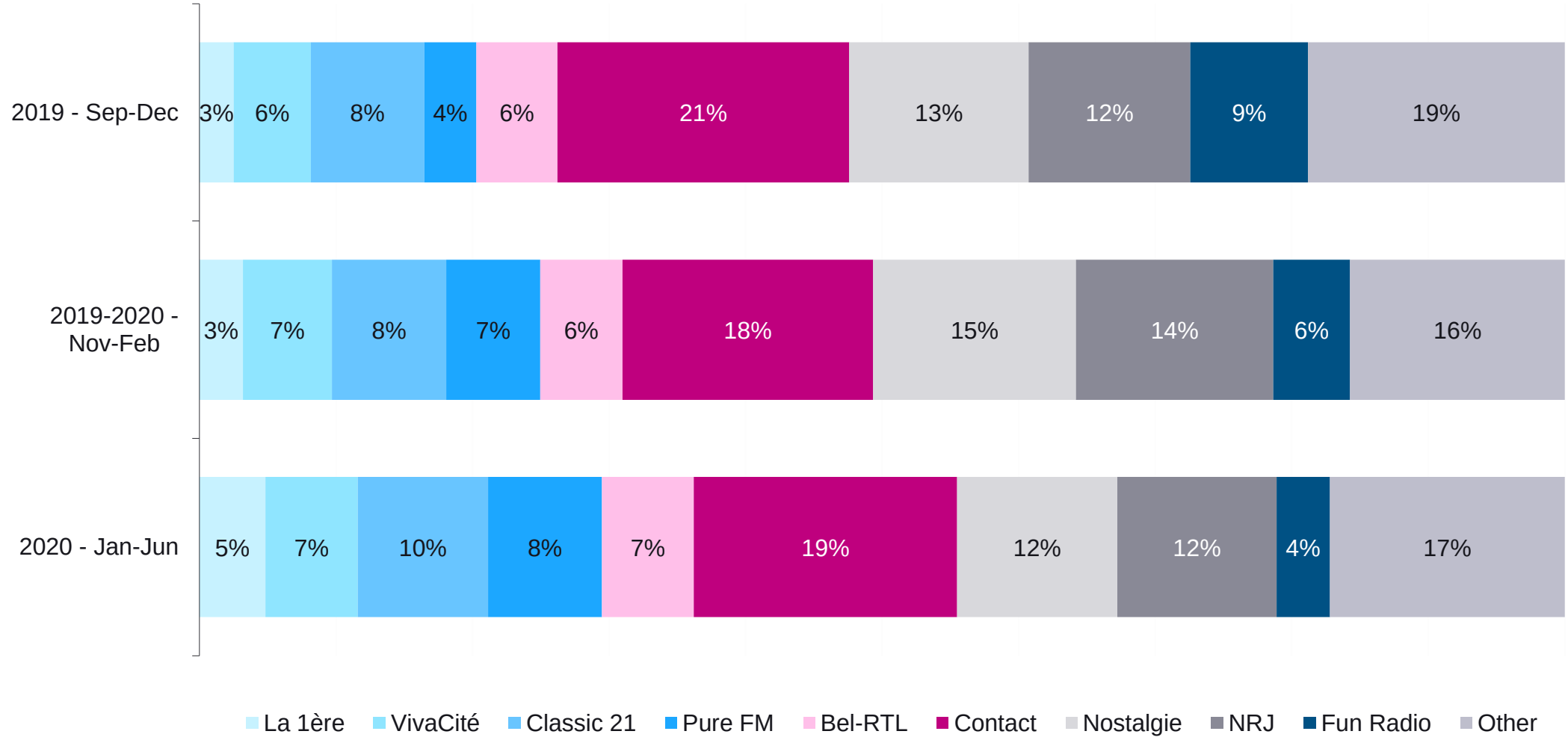
Source: CIM RAM
NB: CIM Rule - Any media planning processing must be carried out on the cumulative data of the last three waves

KEY RADIO FIGURES SOUTH
Average break rating (%) on ALL 18-44 - 07:00-19:00



Source: CIM RAM
NB: CIM Rule - Any media planning processing must be carried out on the cumulative data of the last three waves

KEY RADIO FIGURES SOUTH
Audience Shares (%) on ALL 18-44 - 07:00-19:00



Source: CIM RAM
NB: CIM Rule - Any media planning processing must be carried out on the cumulative data of the last three waves

Print Circulation

Key Print Figures - Newspapers/Magazines circulation

Print Circulation:

Number of copies sold/given on an average issue.
Yearly delivery.
"Cim-authentified" datas.
Includes digital sales.

Source: CIM Press Brand Report

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**

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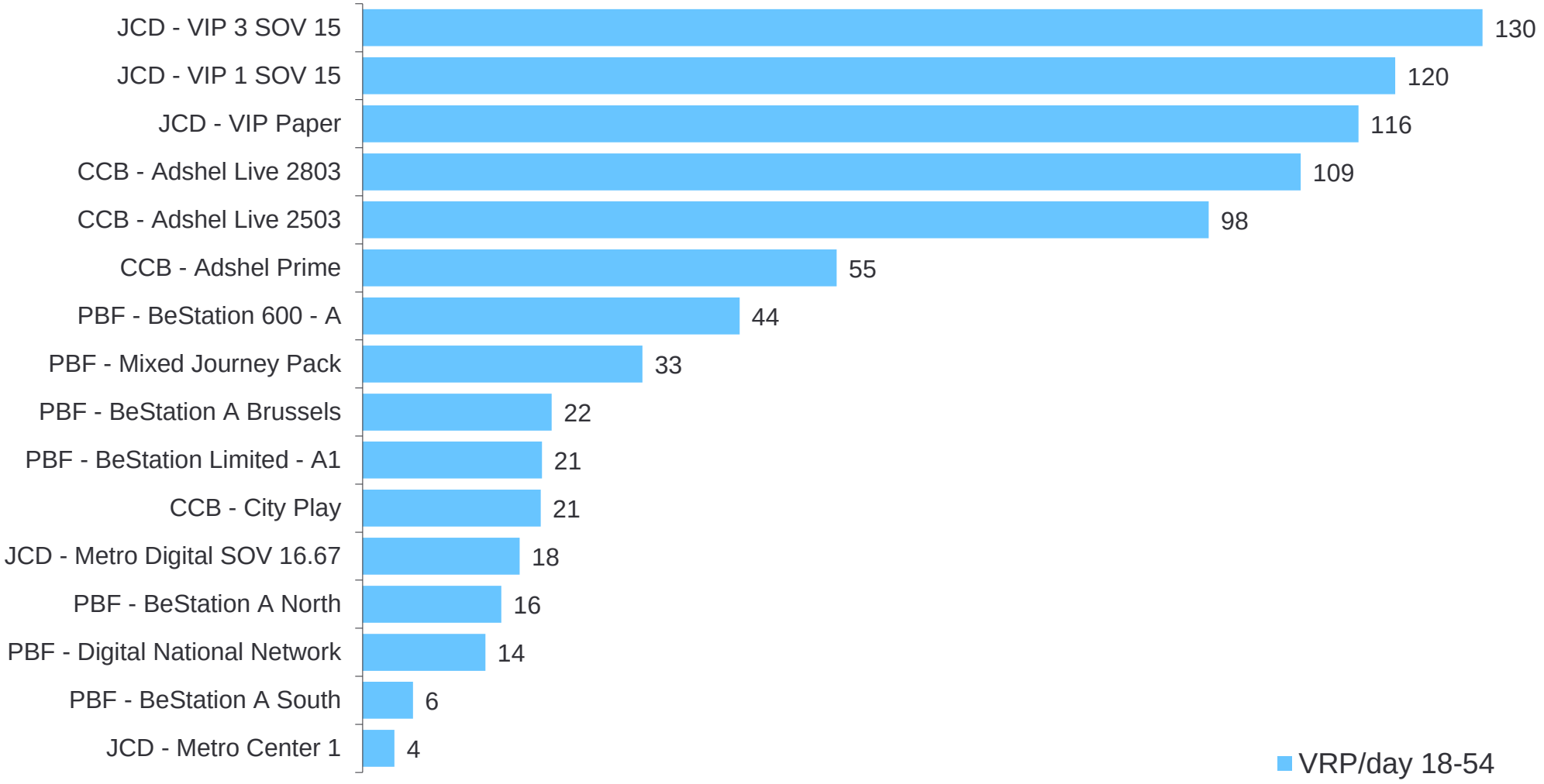
Sources: CIM Press Brand Report (CIM authentified)

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



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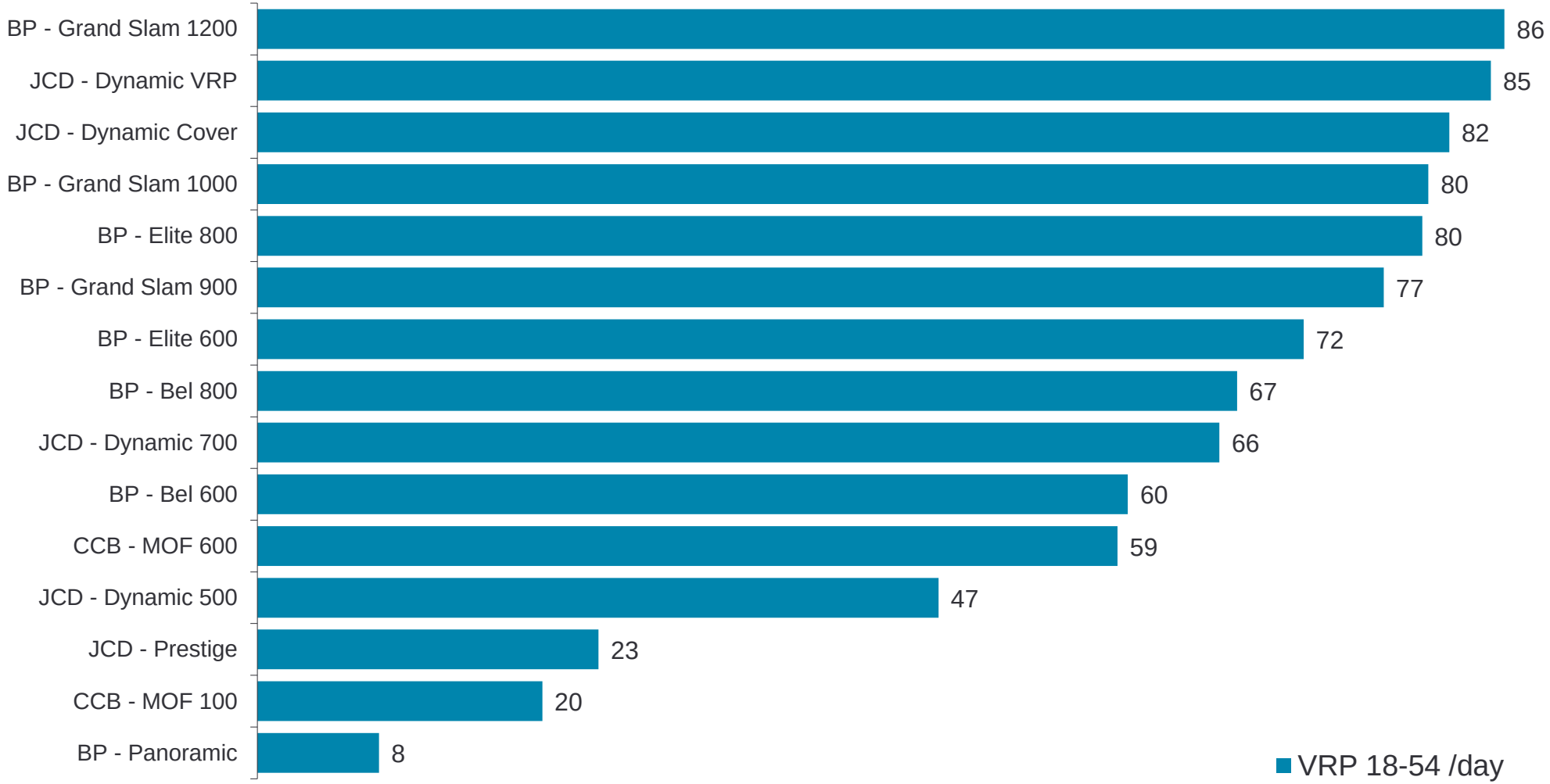
Source: CIM Traffic Outdoor Survey 2020-02 / * : Visibility adjusted Rating Point

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



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Source: CIM Traffic Outdoor Survey 2020-02 / * : Visibility adjusted Rating Point