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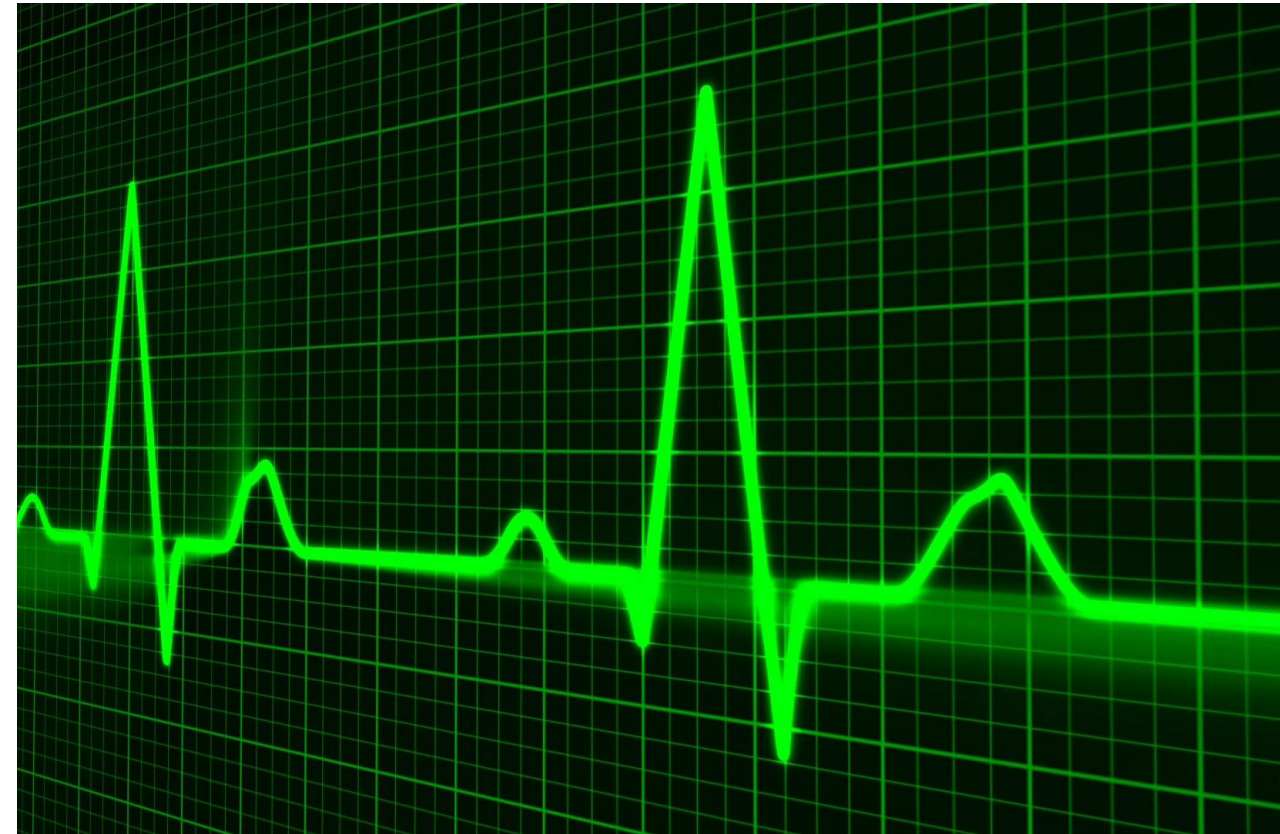
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

September 2021



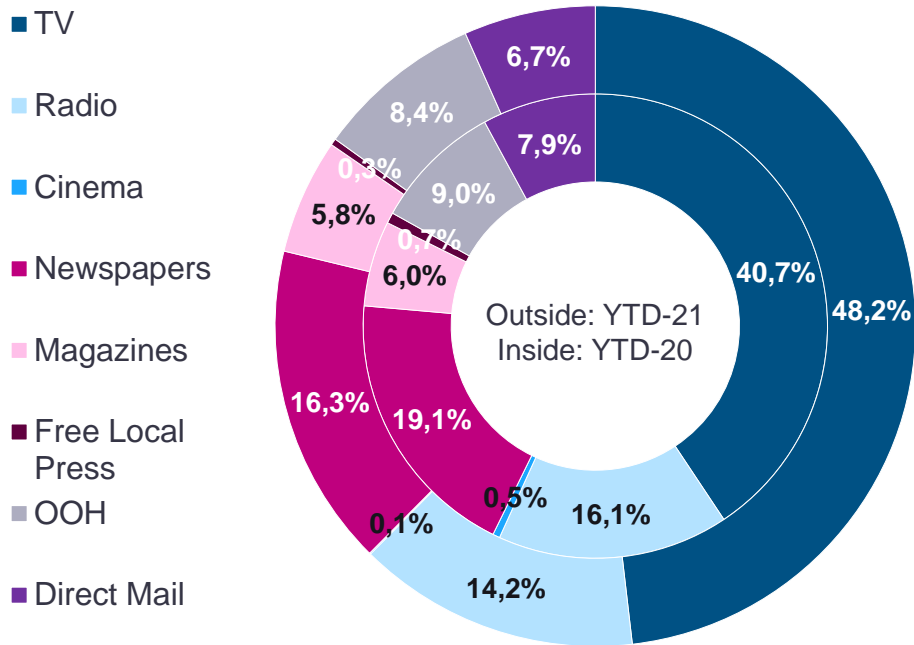
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Aug 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 	2.260,3 + 23,0% 100%	1.381,9 + 23,8% 61%	878,4 + 21,8% 39%

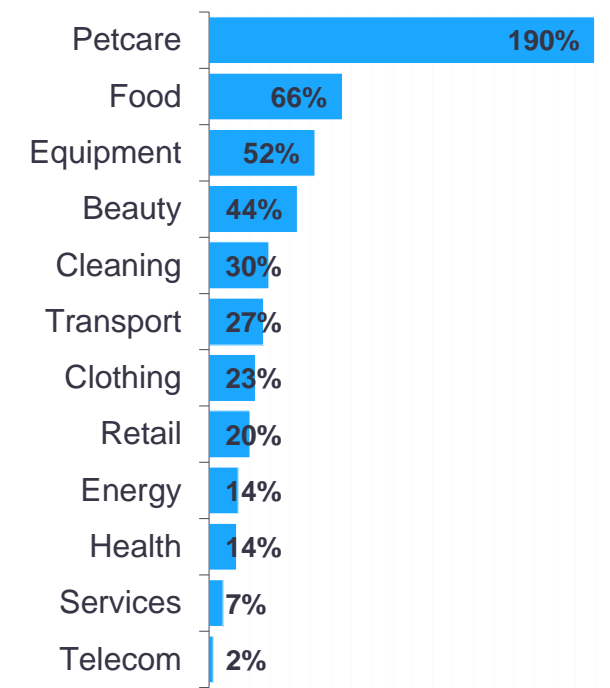
Media Mix Evol.



Media Evol. (vs YTD-20)



EcoGroups Evol. (vs YTD-20)



MDB TOP 30 ADVERTISERS - Jan-Aug 2021

NB : No Internet figures in MDB for 2020 & 2021

Rank	ADV.GROUP	Gross Inv.	vs 2020
1	COLRUYT GROUP	91,4	↑ 116
2	PROCTER & GAMBLE	90,3	↑ 143
3	AHOLD DELHAIZE	51,8	↑ 149
4	THE COCA-COLA COMPANY	49,4	↑ 225
5	D'IETEREN GROUP	38,2	↑ 169
6	UNILEVER	36,4	↑ 160
7	RECKITT & BENCKISER	30,0	↑ 122
8	TELENET GROUP HOLDING	27,2	↑ 119
9	PROXIMUS GROUP	21,9	↔ 101
10	L'OREAL GROUP	20,4	↑ 196
11	NESTLE GROUP	20,1	↑ 144
12	ORANGE	19,9	↓ 98
13	LOTERIE NATIONALE	19,2	↑ 124
14	FERRERO	18,7	↑ 175
15	AS WATSON	18,6	↑ 142

Rank	ADV.GROUP	Gross Inv.	vs 2020
16	RENAULT-NISSAN ALLIANCE	17,9	↑ 115
17	PSA GROUPE	17,3	↓ 92
18	NETHYS	17,0	↑ 117
19	CARREFOUR GROUP	17,0	↑ 103
20	BMW GROUP BELGIUM	16,7	↑ 140
21	LIDL & CO	16,3	↑ 114
22	ALDI	16,1	↓ 79
23	VINTED	15,6	↑ 125
24	BEIERSDORF	14,9	↑ 131
25	MONDELEZ INTERNATIONAL	14,7	↑ 154
26	COOLBLUE	14,3	↑ 230
27	GROUPE 3 SUISESSES	14,2	↑ 106
28	HENKEL	14,0	↑ 130
29	PEPSICO	13,2	↔ 100
30	HELLOFRESH	13,2	↑ 181



Key TV figures

Key TV figures North - Sep-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Sep-21	YTD-21	Sep-21	YTD-21	Sep-21	YTD-21
VTM	PRP 18-54	6,0	5,7	26,9	24,4	38,8	267,8
VTM2	PRP 18-54	1,5	1,4	6,9	5,9	11,2	67,6
VTM3	PRP 18-54	0,7	0,9	3,2	3,6	4,8	41,7
VTM4	MEN 18-54	0,6	0,5	3,1	2,8	2,3	24,9
Play4	PRP 18-54	2,5	2,6	11,2	11,1	15,3	122,5
Play5	PRP 18-54	1,0	1,0	4,4	4,3	5,5	48,2
Play6	PRP 18-54	0,4	0,6	1,9	2,4	4,9	28,8
Total TV	PRP 18-54	22,4	23,5				
Total TV	MEN 18-54	18,4	19,5				

Key TV indexes North - Sep-21

CHANNEL	MARKETING TARGET	<u>RATING</u> vs P-1 17:00-23:00		<u>AUDIENCE SHARE</u> vs P-1 17:00-23:00		<u>Gross Invest. (€ Mo)</u> vs P-1 Total Day	
		Sep-21	YTD-21	Sep-21	YTD-21	Sep-21	YTD-21
VTM	PRP 18-54	↓ 81	↓ 85	↓ 95	↓ 96	→ 100	↑ 125
VTM2	PRP 18-54	↓ 81	↓ 82	↓ 96	↓ 92	↑ 133	↑ 148
VTM3	PRP 18-54	↓ 86	↓ 73	→ 100	↓ 82	↓ 89	↑ 150
VTM4	MEN 18-54	↑ 104	↓ 96	↑ 124	↑ 110	↑ 108	↑ 175
Play4	PRP 18-54	↓ 88	↓ 89	↑ 103	→ 101	↓ 83	↑ 124
Play5	PRP 18-54	↓ 80	↓ 69	↓ 94	↓ 78	↓ 81	↑ 111
Play6	PRP 18-54	↑ 102	↓ 93	↑ 119	↑ 105	↑ 112	↑ 148
Total TV	PRP 18-54	↓ 85	↓ 88				
Total TV	MEN 18-54	↓ 83	↓ 88				

Warning : In March and April 2020 TV ratings were exceptionally high (due to the first lockdown and the need for information), and in June 2021, the UEFA Euro was broadcasted on VRT channels. The YTD indexes should therefore be interpreted with caution.

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

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

Source: CIM TV - Live +7 including guests

Variable	Channel	Daypart	YTD-18	YTD-19	YTD-20	YTD-21	21 vs 20
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	27,5%	27,3%	29,9%	28,2%	94
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	82,9%	81,2%	79,0%	73,0%	92
	VHS + DVD player + Blu-Ray	"	3,6%	2,5%	2,4%	1,5%	63
	Video on demand + Digital recorder	"	11,9%	14,6%	17,2%	24,2%	141
	Game console and other devices (3)	"	1,6%	1,7%	1,4%	1,1%	79
% Time shift viewing (4)	All Channels	"	25,1%	29,0%	32,5%	33,2%	102
	Main Channels (5)	"	29,7%	32,9%	36,3%	38,1%	105
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	86	85	85	79	
	Main channels (5) - TSV	"	34	35	36	36	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	101	94	96	81	84
	All TV channels (TSV)	"	29	31	36	33	91
	All TV channels (Live + TSV)	"	130	125	132	114	86
	Other TV Screen Usage	"	35	37	46	53	116
	Total TV Screen Usage	"	165	162	178	167	94

Warning : In March and April 2020 TV ratings were exceptionally high (due to the first lockdown and the need for information). The indexes should therefore be interpreted with caution.

Key TV figures South - Sep-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Sep-21	YTD-21	Sep-21	YTD-21	Sep-21	YTD-21
RTL-TVI	PRP 18-54	4,5	5,4	23,1	24,6	30,3	187,8
Club-RTL	MEN 18-54	1,2	1,0	7,7	5,8	4,5	27,6
Plug-RTL	ALL 15-34	0,4	0,5	3,9	4,3	2,6	15,7
TF1	PRP 18-54	2,6	2,7	13,3	12,2	8,5	44,4
La Une	PRP 18-54	3,2	3,8	16,2	17,3	12,4	77,8
Tipik	PRP 18-54	1,1	1,5	5,4	7,1	2,9	27,2
AB3	PRP 18-44	1,2	1,2	7,2	6,8	3,2	19,0
TTV	PRP 18-54	19,6	21,9				
TTV	PRP 18-44	16,0	17,8				
TTV	ALL 15-34	9,9	11,6				
TTV	MEN 18-54	15,0	16,9				

Key TV indexes South - Sep-21

CHANNEL	MARKETING TARGET	RATING vs P-1 17:00-23:00		AUDIENCE SHARE vs P-1 17:00-23:00		Gross Invest. (€ Mo) vs P-1 Total Day	
		Sep-21	YTD-21	Sep-21	YTD-21	Sep-21	YTD-21
RTL-TV1	PRP 18-54	↓ 80	↓ 80	↓ 91	↓ 92	↓ 98	↑ 125
Club-RTL	MEN 18-54	↑ 140	↔ 99	↑ 154	↑ 108	↓ 82	↑ 106
Plug-RTL	ALL 15-34	↓ 75	↓ 81	↓ 88	↓ 97	↑ 114	↑ 146
TF1	PRP 18-54	↓ 87	↓ 82	↓ 98	↓ 95	↑ 142	↑ 183
La Une	PRP 18-54	↓ 91	↓ 98	↑ 103	↑ 113	↑ 111	↑ 137
Tipik	PRP 18-54	↓ 81	↑ 113	↓ 92	↑ 130	↔ 99	↑ 163
AB3	PRP 18-44	↓ 86	↓ 78	↓ 95	↓ 93	↑ 102	↓ 92
TTV	PRP 18-54	↓ 89	↓ 87				
TTV	PRP 18-44	↓ 91	↓ 84				
TTV	ALL 15-34	↓ 84	↓ 83				
TTV	MEN 18-54	↓ 90	↓ 92				

Warning : In March and April 2020 TV ratings were exceptionally high (due to the first lockdown and the need for information), and in June 2021, the UEFA Euro was broadcasted on RTBF channels. The YTD indexes should therefore be interpreted with caution.

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

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

Source: CIM TV - Live +7 including guests

Variable	Channel	Daypart	YTD-18	YTD-19	YTD-20	YTD-21	21 vs 20
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	30,9%	30,4%	32,8%	30,3%	93
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	75,1%	72,4%	67,0%	63,7%	95
	VHS + DVD player + Blu-Ray	"	6,6%	5,0%	4,0%	2,5%	63
	Video on demand + Digital recorder	"	17,6%	21,4%	27,8%	33,1%	119
	Game console and other devices (3)	"	0,7%	1,2%	1,2%	0,6%	50
% Time shift viewing (4)	All Channels	"	20,2%	21,5%	24,0%	26,3%	109
	Main Channels (5)	"	20,6%	21,9%	24,5%	26,9%	110
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	83	87	88	86	
	Main channels (5) - TSV	"	51	50	51	55	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	125	121	115	98	85
	All TV channels (TSV)	"	25	27	29	28	95
	All TV channels (Live + TSV)	"	151	148	145	126	87
	Other TV Screen Usage	"	58	65	84	83	99
	Total TV Screen Usage	"	209	213	229	209	91

Warning : In March and April 2020 TV ratings were exceptionally high (due to the first lockdown and the need for information). The indexes should therefore be interpreted with caution.



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Sep-21

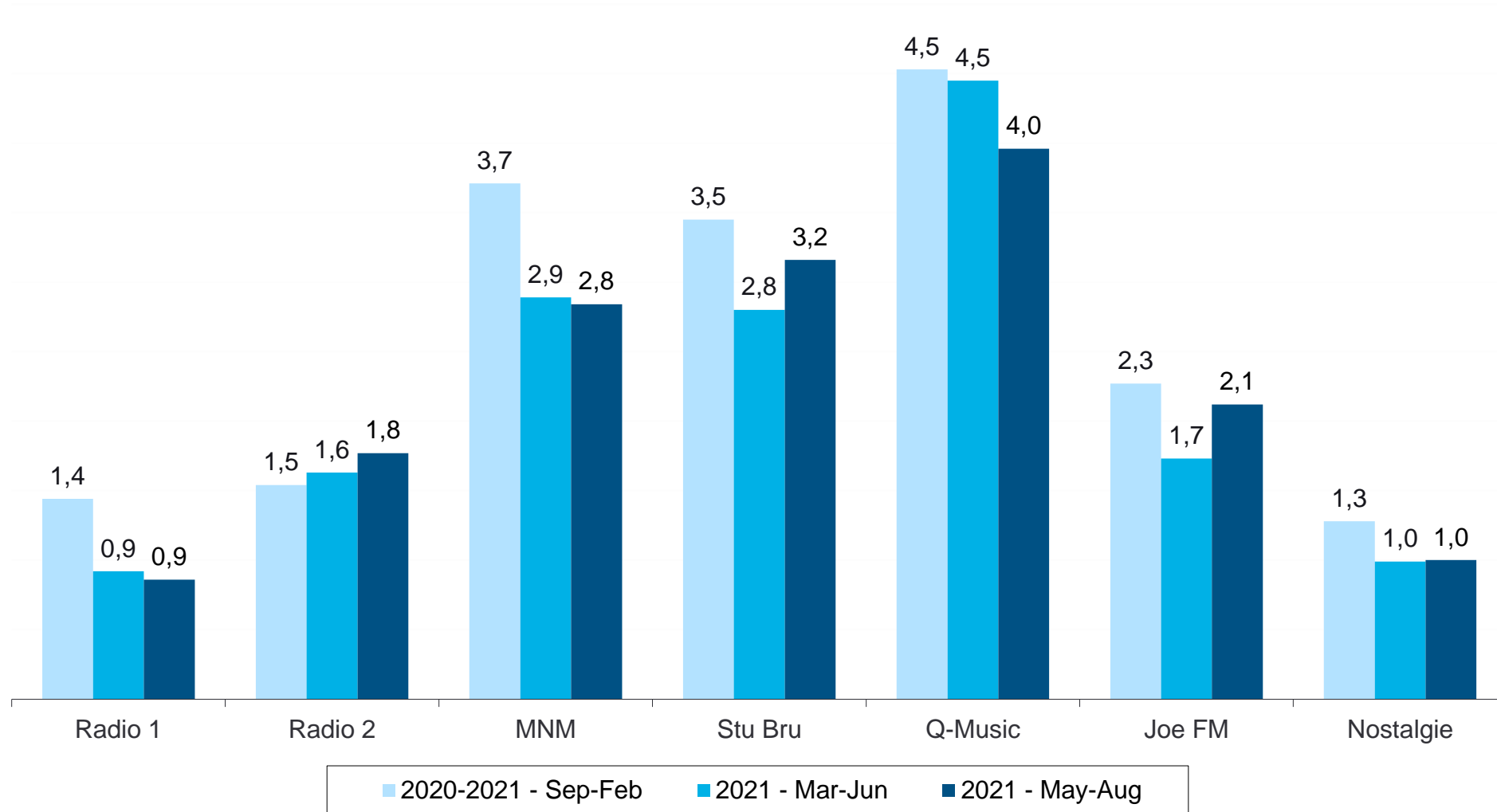
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	2.874.060	11	Sporza	1.469.916
2	Nieuwsblad	2.730.252	12	Gazet van Antwerpen	1.283.688
3	VRT	2.029.440	13	L'Avenir.net	1.235.892
4	Sudinfo	1.958.712	14	De Standaard	1.213.044
5	DH.be	1.791.636	15	La Libre.be	1.094.268
6	RTBF.be	1.758.624	16	De Morgen	1.083.516
7	RTL.be	1.642.452	17	Knack/Le Vif	1.057.812
8	2dehands.be/2ememain.be	1.550.388	18	Flair	995.232
9	Le Soir	1.501.584	19	7sur7.be	988.176
10	Immoweb	1.482.180	20	Vlan.be	897.792



Key Radio figures

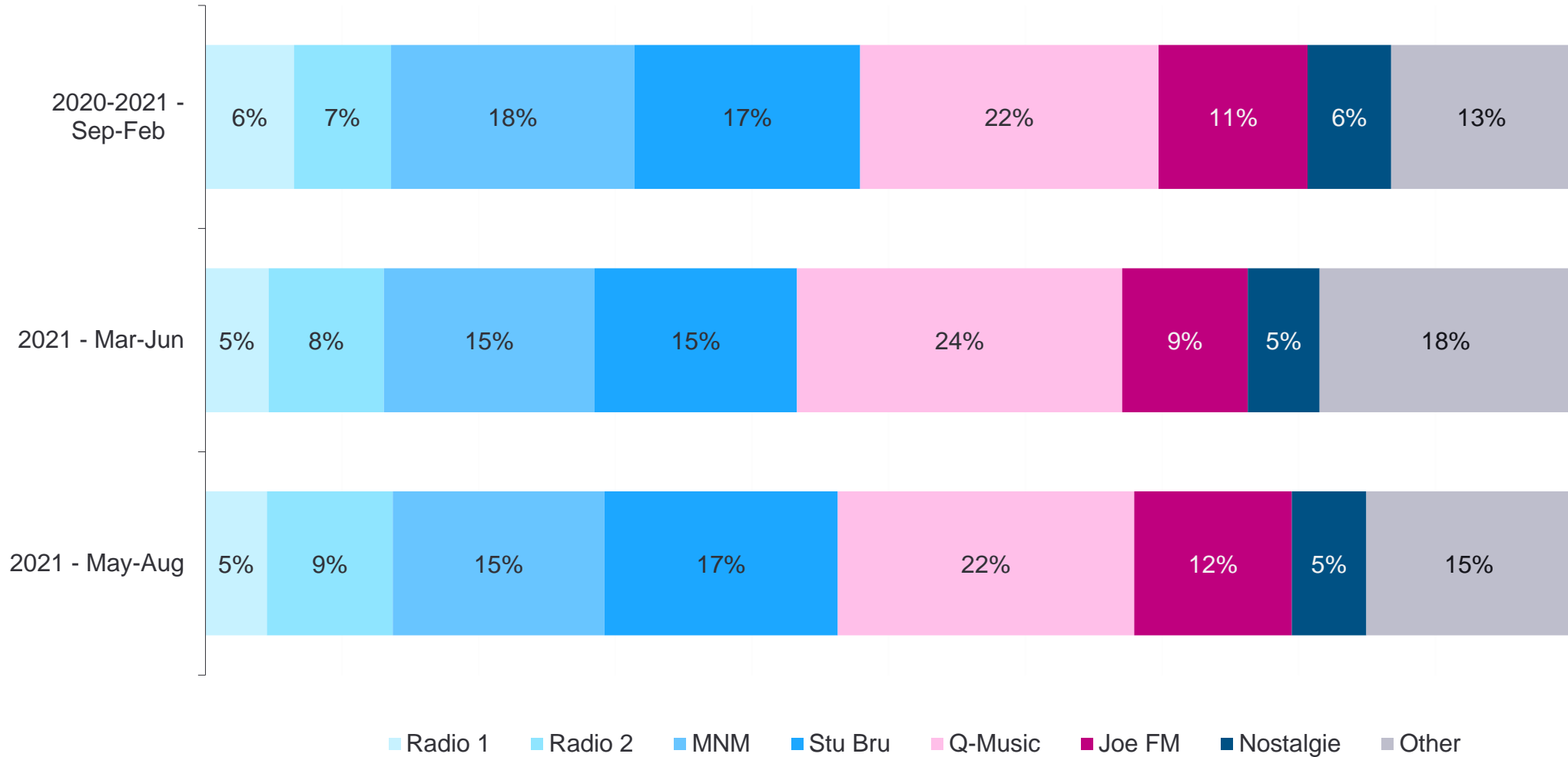
KEY RADIO FIGURES NORTH

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



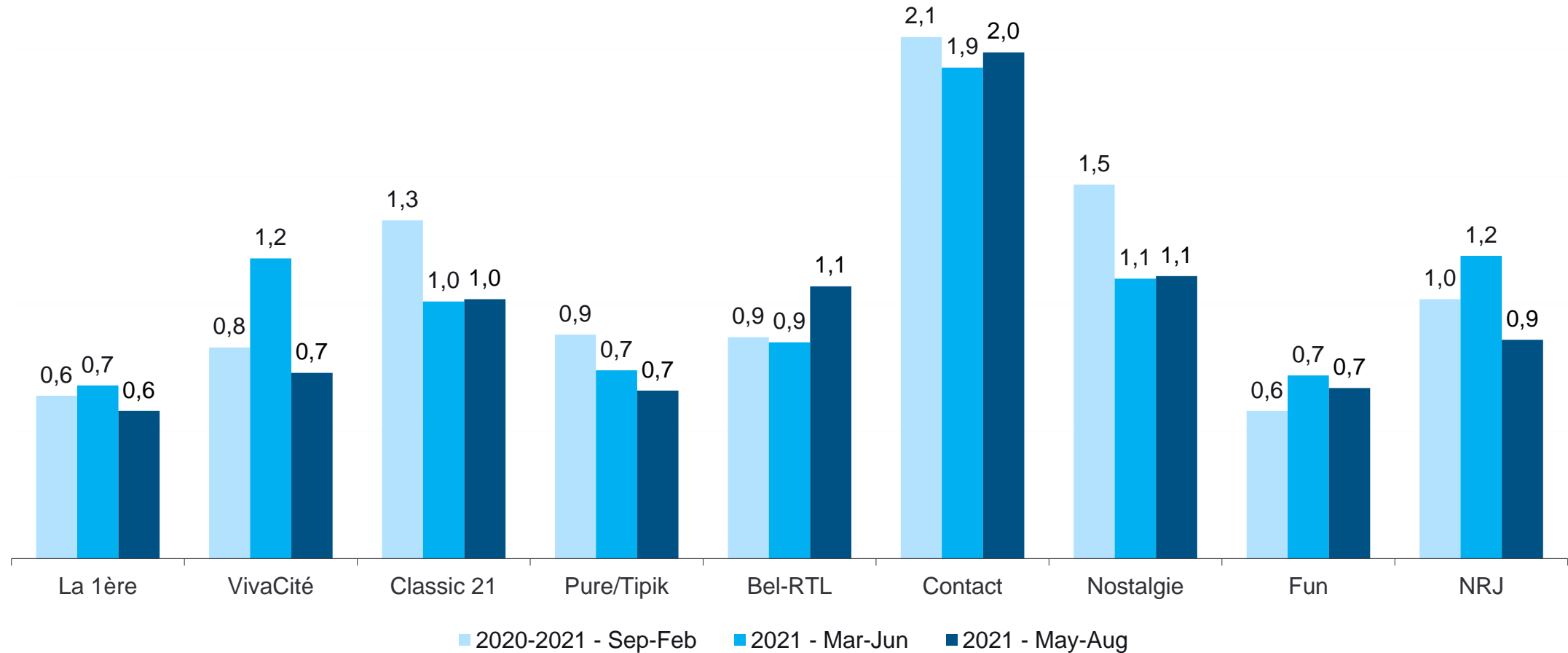
KEY RADIO FIGURES NORTH

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



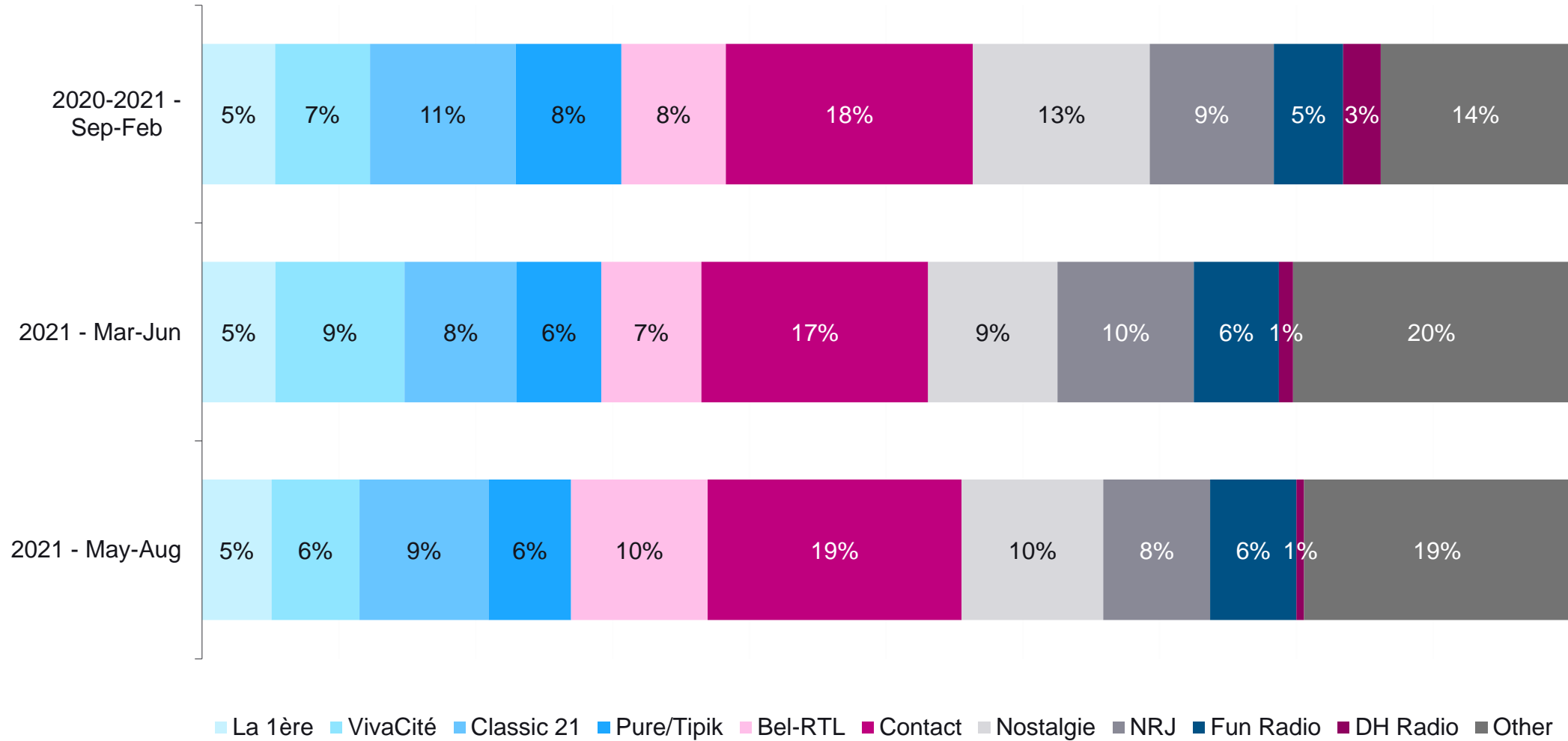
KEY RADIO FIGURES SOUTH

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 2020 (Paid + Free - digital sales included)

NORTH	Circulation	vs 2019	Digital Part	vs 2019
Het Laatste Nieuws/De Nieuwe Gazet	230.054	↓ 95	14%	↑ 126
Het Nieuwsblad/De Gentenaar	204.678	↓ 97	10%	↑ 116
De Standaard	110.868	↑ 106	36%	↑ 120
Het Belang van Limburg	84.900	↓ 98	12%	↑ 111
Gazet van Antwerpen	72.417	↓ 95	13%	↑ 109
De Tijd	49.927	↑ 109	51%	↑ 110
De Morgen	46.618	↓ 98	43%	↑ 109
Total North	799.462	↓ 98	20%	↑ 119

SOUTH	Circulation	vs 2019	Digital Part	vs 2019
Le Soir	73.639	↑ 120	56%	↑ 172
L'Avenir	69.087	↓ 92	9%	↓ 76
Sud Presse	69.052	↓ 94	21%	↑ 121
La Libre Belgique	40.956	↑ 109	39%	↑ 129
La DH	31.928	↓ 91	21%	↑ 124
L'Echo	16.917	↑ 101	53%	↑ 106
Grenz Echo	8.449	↓ 88	12%	↑ 163
Total South	310.028	→ 100	30%	↑ 138

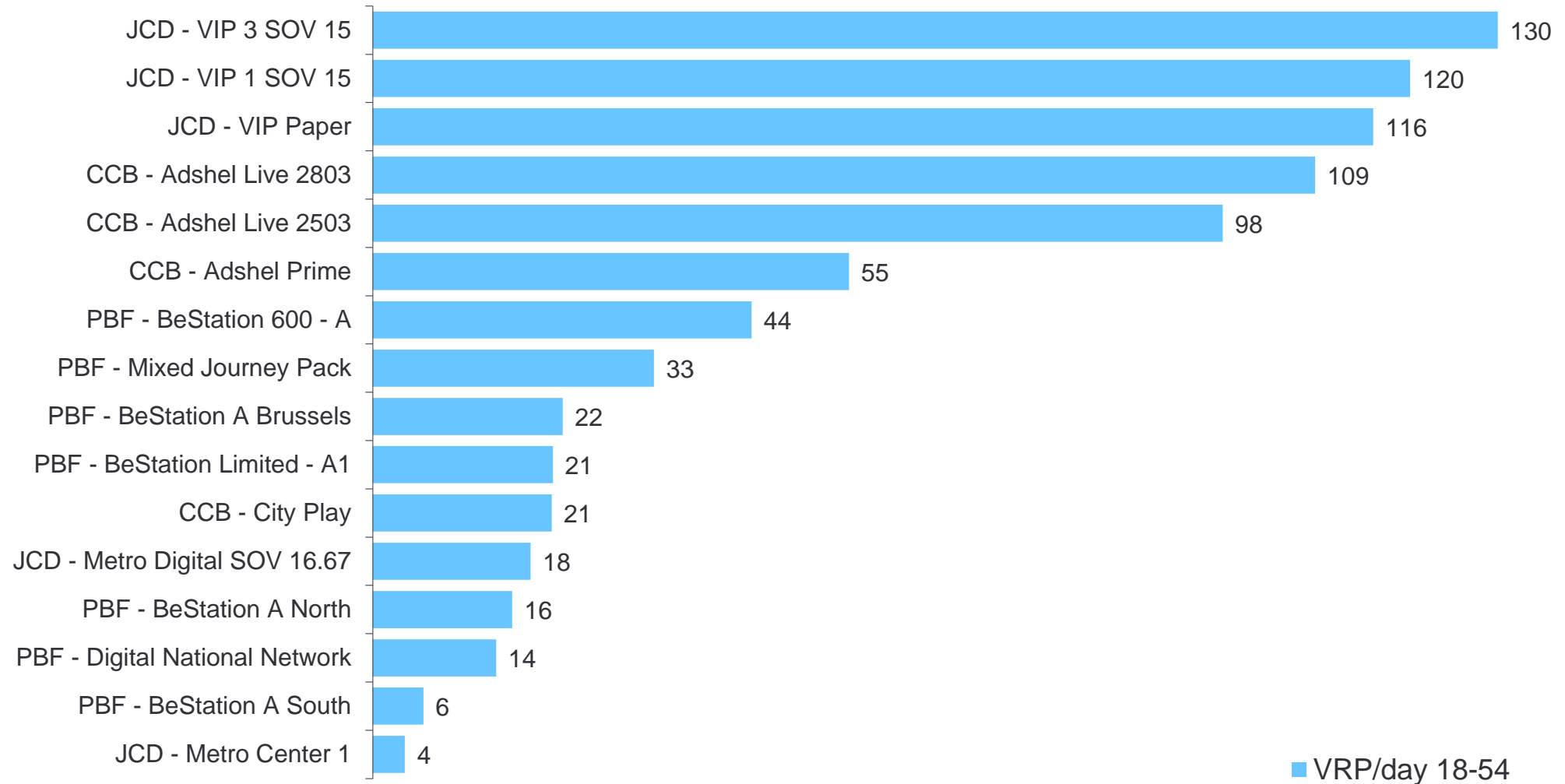
Key Print Figures - Magazines Circulation - Year 2020 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages		TOTAL	
	Circulation	vs 2019	Circulation	vs 2019	Circulation	vs 2019	Circulation	vs 2019
Television	572.494	↓ 96	345.684	↓ 93			918.178	↓ 95
Lifestyle Culture & Travel	110.940	↑ 104	68.286	↑ 102	354.928	↑ 107	534.154	↑ 105
Women	307.494	↓ 96	131.623	↓ 89			439.117	↓ 93
Business & News	103.172	↓ 98	128.560	↓ 98	43.473	↓ 85	275.205	↓ 95
Generation (Youth/Senior)			13.315	↓ 91	114.521	↓ 96	127.836	↓ 95
Build & Deco	42.917	↓ 90	21.408	↓ 80	26.452	↓ 94	90.777	↓ 89
Men	23.388	↓ 81	11.704	↓ 79	30.621	↓ 98	65.713	↓ 88
TOTAL	1.160.405	↓ 96	720.580	↓ 93	569.995	↑ 101	2.450.980	↓ 96



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

