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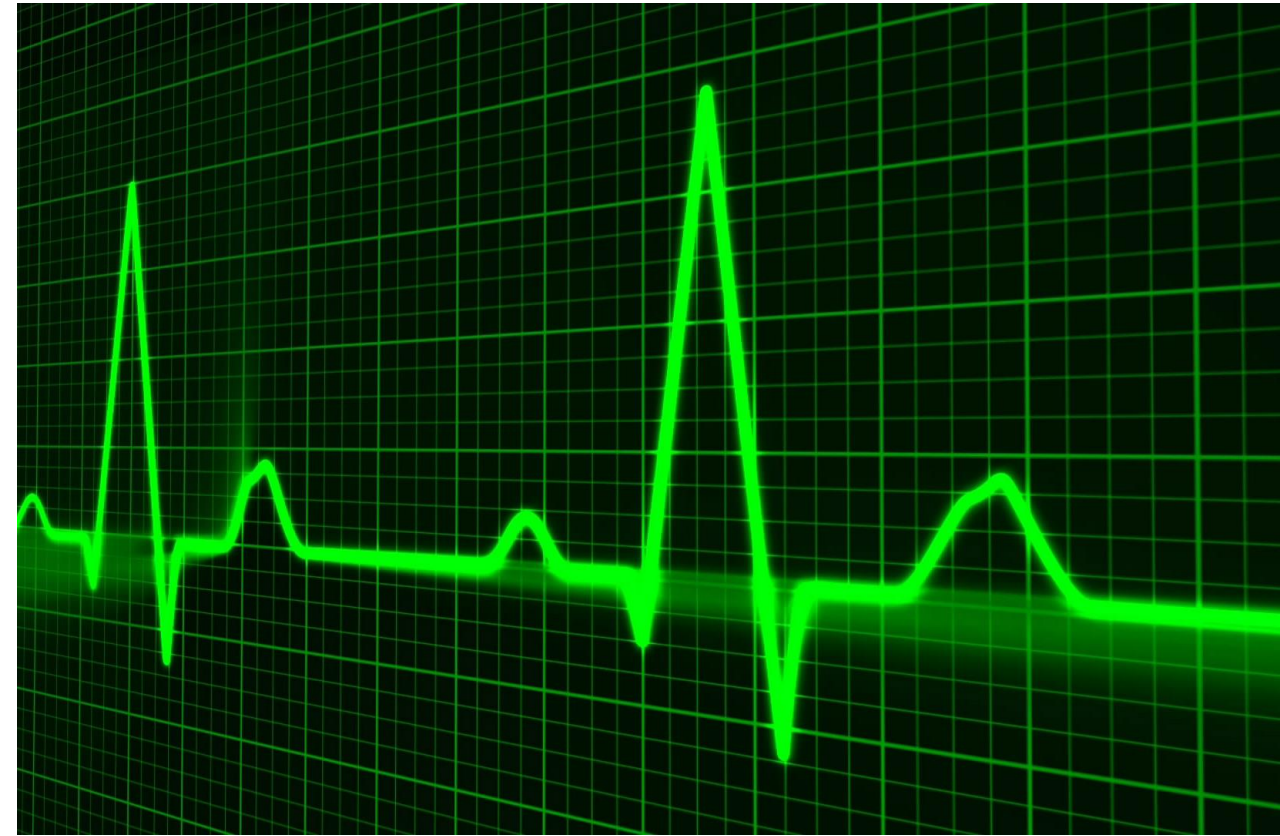
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

May 2021



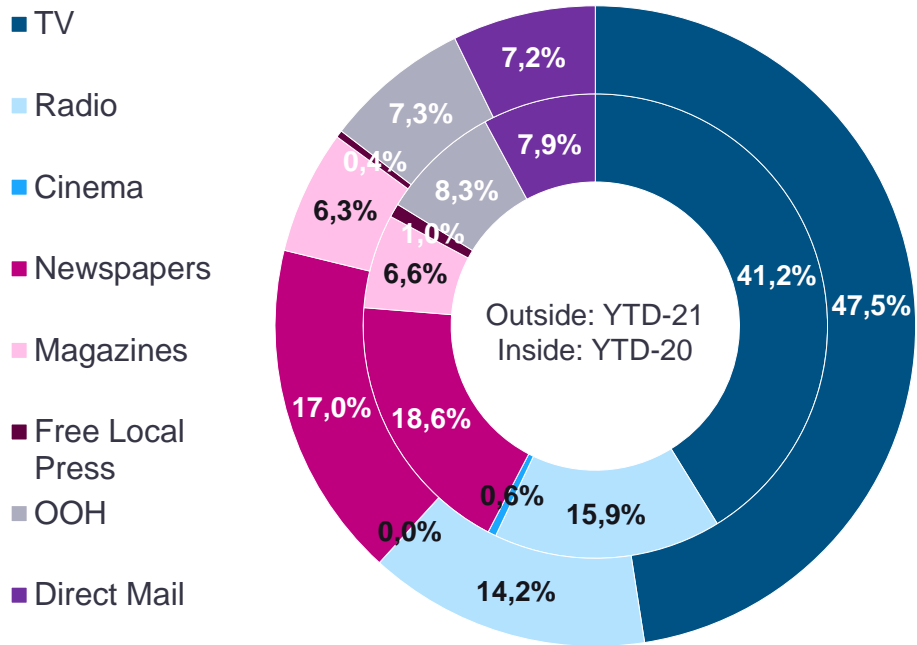
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Apr 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 	1.100,8 + 18,5% 100%	674,0 + 20,3% 61%	426,8 + 15,8% 39%

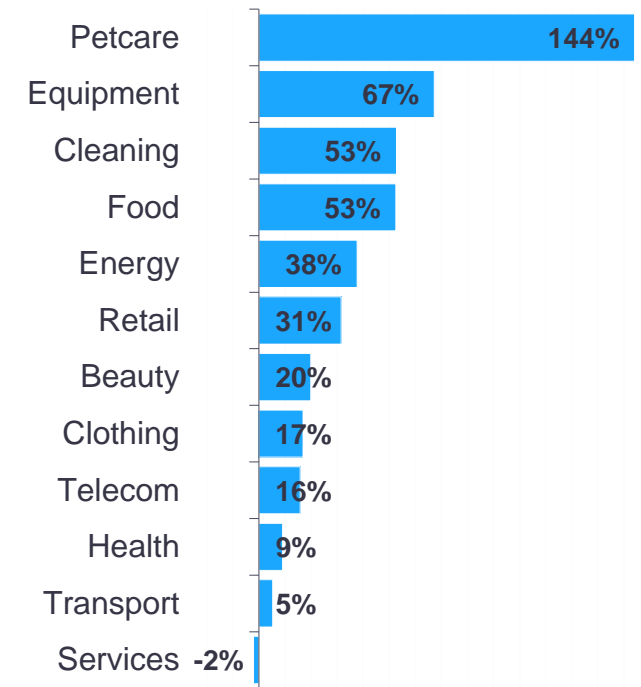
Media Mix Evol.



Media Evol. (vs YTD-20)



EcoGroups Evol. (vs YTD-20)



MDB TOP 30 ADVERTISERS - Jan-Apr 2021

NB : No Internet figures in MDB for 2020 & 2021

Rank	ADV.GROUP	Gross Inv.	vs 2020
1	COLRUYT GROUP	47,5	↑ 153
2	PROCTER & GAMBLE	42,5	↑ 145
3	D'IETEREN GROUP	23,1	↑ 115
4	AHOLD DELHAIZE	21,8	↑ 150
5	THE COCA-COLA COMPANY	18,9	↑ 244
6	PSA GROUPE	14,6	↓ 97
7	TELENET GROUP HOLDING	14,4	↑ 147
8	UNILEVER	14,1	↑ 144
9	RECKITT & BENCKISER	12,8	↑ 147
10	RENAULT-NISSAN ALLIANCE	11,3	↓ 96
11	PROXIMUS GROUP	11,1	↑ 134
12	LOTERIE NATIONALE	10,2	↑ 138
13	BMW GROUP BELGIUM	9,8	↑ 188
14	VINTED	9,5	↑ 134
15	NETHYS	9,1	↑ 129

Rank	ADV.GROUP	Gross Inv.	vs 2020
16	L'OREAL GROUP	9,0	↑ 161
17	AS WATSON	8,5	↑ 197
18	FERRERO	8,5	↑ 103
19	LIDL & CO	8,1	↑ 154
20	ORANGE	8,1	↓ 78
21	NESTLE GROUP	7,9	↑ 144
22	HENKEL	7,7	↑ 183
23	MONDELEZ INTERNATIONAL	7,5	↑ 150
24	HELLOFRESH	7,3	↑ 199
25	CARREFOUR GROUP	7,2	↑ 115
26	ALDI	6,8	↓ 73
27	COOLBLUE	6,8	↑ 546
28	GROUPE 3 SUISES	6,6	↑ 117
29	AXA GROUP	6,1	↑ 121
30	ENGIE	5,6	↑ 179



Key TV figures

Key TV figures North - May-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		May-21	YTD	May-21	YTD	May-21	YTD
VTM	PRP 18-54	6,1	6,8	24,5	25,5	39,9	152,9
VTM2	PRP 18-54	1,7	1,6	6,7	6,1	10,2	36,4
VTM3	PRP 18-54	0,8	1,0	3,1	3,7	7,1	22,0
VTM4	MEN 18-54	0,5	0,6	2,3	2,7	3,9	12,9
Play4	PRP 18-54	3,4	3,5	13,8	13,1	19,4	80,0
Play5	PRP 18-54	1,0	1,2	4,2	4,5	7,0	31,3
Play6	PRP 18-54	0,6	0,6	2,4	2,3	3,6	14,1
Total TV	PRP 18-54	24,9	26,7				
Total TV	MEN 18-54	20,4	21,6				

Key TV indexes North - May-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	
		May-21	YTD	May-21	YTD	May-21	YTD
VTM	PRP 18-54	↓ 92	↓ 87	↗ 101	↓ 98	↑ 174	↑ 140
VTM2	PRP 18-54	↓ 85	↓ 90	↓ 93	↔ 100	↑ 216	↑ 167
VTM3	PRP 18-54	↓ 69	↓ 77	↓ 75	↓ 86	↑ 232	↑ 157
VTM4	MEN 18-54	↓ 82	↑ 110	↓ 90	↑ 125	↑ 223	↑ 164
Play4	PRP 18-54	↗ 101	↘ 99	↑ 110	↑ 111	↑ 160	↑ 152
Play5	PRP 18-54	↓ 54	↓ 66	↓ 59	↓ 75	↑ 150	↑ 134
Play6	PRP 18-54	↓ 87	↓ 95	↓ 96	↑ 108	↑ 210	↑ 155
Total TV	PRP 18-54	↓ 92	↓ 89				
Total TV	MEN 18-54	↓ 92	↓ 88				

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

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

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

Source: CIM TV - Live +7 including guests

Variable	Channel	Daypart	YTD-17	YTD-18	YTD-19	YTD-20	21 vs 20
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	29,8%	29,6%	33,1%	31,4%	95
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	83,8%	82,4%	80,0%	74,1%	93
	VHS + DVD player + Blu-Ray	"	3,6%	2,4%	2,3%	2,0%	88
	Video on demand + Digital recorder	"	11,2%	13,6%	16,2%	22,5%	139
	Game console and other devices (3)	"	1,4%	1,6%	1,5%	1,2%	80
% Time shift viewing (4)	All Channels	"	26,4%	30,2%	33,2%	34,7%	104
	Main Channels (5)	"	30,2%	34,1%	37,0%	39,0%	105
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	87	87	87	82	
	Main channels (5) - TSV	"	34	35	36	35	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	108	100	106	87	82
	All TV channels (TSV)	"	32	35	41	38	93
	All TV channels (Live + TSV)	"	140	134	147	125	85
	Other TV Screen Usage	"	36	38	48	56	116
	Total TV Screen Usage	"	176	172	196	181	92

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 great caution.

Key TV figures South - May-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		May-21	YTD	May-21	YTD	May-21	YTD
RTL-TVI	PRP 18-54	5,7	6,2	25,6	26,0	25,7	107,0
Club-RTL	MEN 18-54	1,1	1,1	6,7	6,2	3,9	16,1
Plug-RTL	ALL 15-34	0,5	0,6	4,0	4,8	2,2	8,6
TF1	PRP 18-54	3,1	3,1	13,9	13,0	5,6	22,2
La Une	PRP 18-54	3,5	4,0	15,6	16,6	10,4	42,6
Tipik	PRP 18-54	1,0	1,2	4,7	5,0	2,7	11,3
AB3	PRP 18-44	1,5	1,3	7,9	6,7	2,9	10,8
TTV	PRP 18-54	22,2	23,8				
TTV	PRP 18-44	18,7	19,1				
TTV	ALL 15-34	11,6	12,5				
TTV	MEN 18-54	16,5	18,1				

Key TV indexes South - May-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	
		May-21	YTD	May-21	YTD	May-21	YTD
RTL-TV1	PRP 18-54	↓ 81	↓ 81	↓ 94	↓ 95	↑ 230	↑ 148
Club-RTL	MEN 18-54	↑ 129	↑ 106	↑ 146	↑ 119	↑ 175	↑ 122
Plug-RTL	ALL 15-34	↓ 82	↓ 87	↑ 103	↑ 112	↑ 256	↑ 164
TF1	PRP 18-54	↓ 84	↓ 86	↔ 99	↔ 101	↑ 312	↑ 223
La Une	PRP 18-54	↓ 91	↓ 90	↑ 107	↑ 106	↑ 194	↑ 142
Tipik	PRP 18-54	↓ 75	↓ 78	↓ 87	↓ 91	↑ 169	↑ 124
AB3	PRP 18-44	↑ 104	↓ 71	↑ 121	↓ 90	↑ 151	↓ 87
TTV	PRP 18-54	↓ 85	↓ 85				
TTV	PRP 18-44	↓ 86	↓ 79				
TTV	ALL 15-34	↓ 81	↓ 78				
TTV	MEN 18-54	↓ 88	↓ 89				

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

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

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

Source: CIM TV - Live +7 including guests

Variable	Channel	Daypart	YTD-17	YTD-18	YTD-19	YTD-20	21 vs 20
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	33,1%	32,9%	36,0%	32,9%	91
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	75,6%	74,1%	67,9%	64,1%	94
	VHS + DVD player + Blu-Ray	"	6,6%	5,1%	3,9%	3,3%	84
	Video on demand + Digital recorder	"	17,0%	19,9%	27,0%	32,0%	119
	Game console and other devices (3)	"	0,8%	1,0%	1,3%	0,7%	52
% Time shift viewing (4)	All Channels	"	21,5%	22,0%	24,2%	28,2%	117
	Main Channels (5)	"	22,6%	22,3%	24,7%	29,3%	119
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	87	88	89	89	
	Main channels (5) - TSV	"	50	52	51	55	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	133	131	126	103	81
	All TV channels (TSV)	"	29	30	33	32	97
	All TV channels (Live + TSV)	"	162	161	159	134	85
	Other TV Screen Usage	"	61	65	89	87	98
	Total TV Screen Usage	"	222	226	248	222	90

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 great caution.



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - May-21

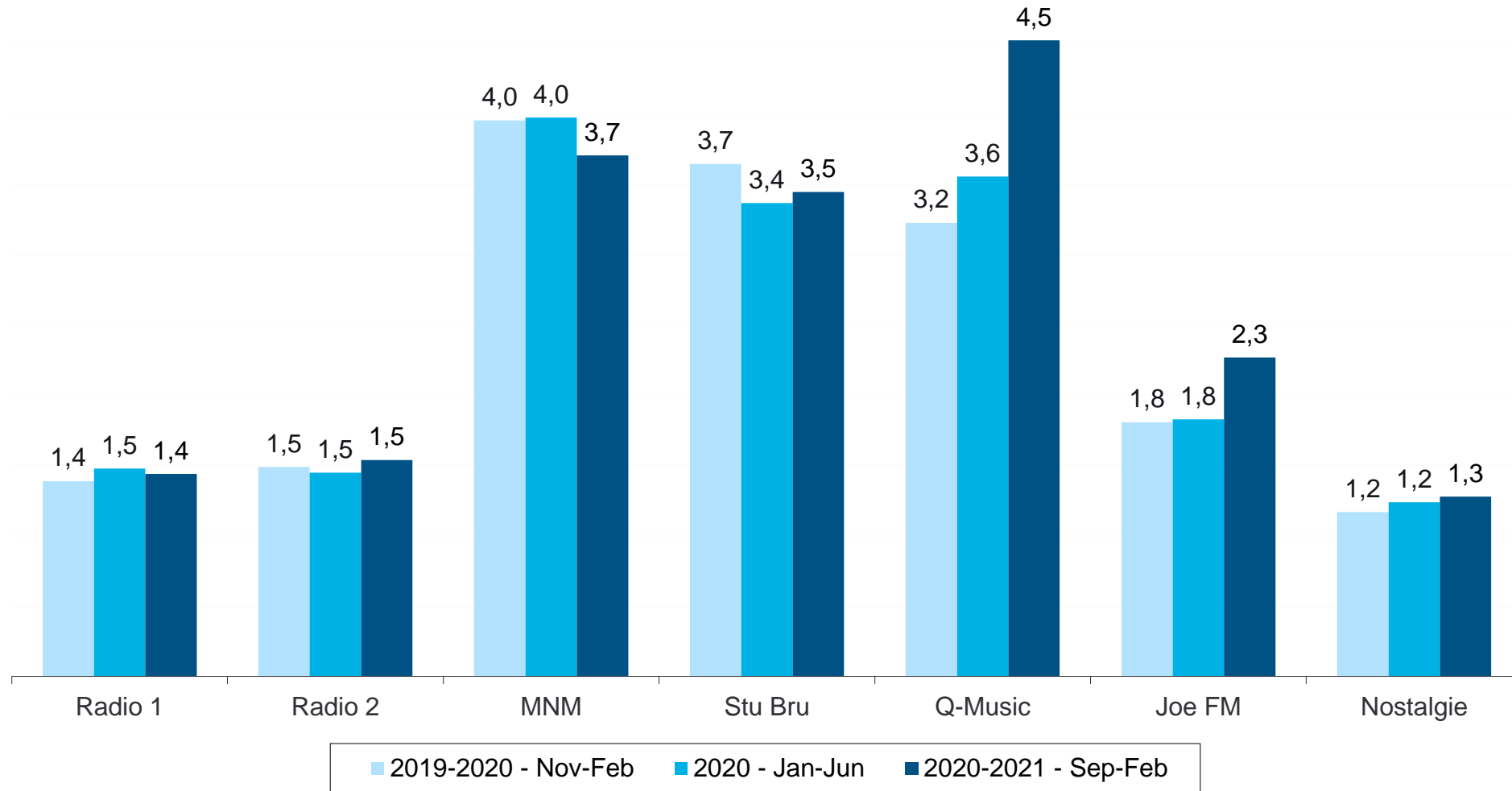
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	2.946.552	11	L'Avenir.net	1.493.520
2	Nieuwsblad	2.915.136	12	La Libre.be	1.399.356
3	VRT	2.387.448	13	Knack/Le Vif	1.389.108
4	Sudinfo	2.206.932	14	De Standaard	1.321.824
5	RTBF.be	2.132.508	15	De Morgen	1.294.188
6	DH.be	1.945.524	16	Flair	1.263.108
7	2dehands.be/2ememain.be	1.930.152	17	Een	1.200.276
8	RTL.be	1.801.128	18	Gazet van Antwerpen	1.185.408
9	Le Soir	1.793.568	19	Buienradar	1.149.036
10	Immoweb	1.617.168	20	Sporza	1.079.316



Key Radio figures

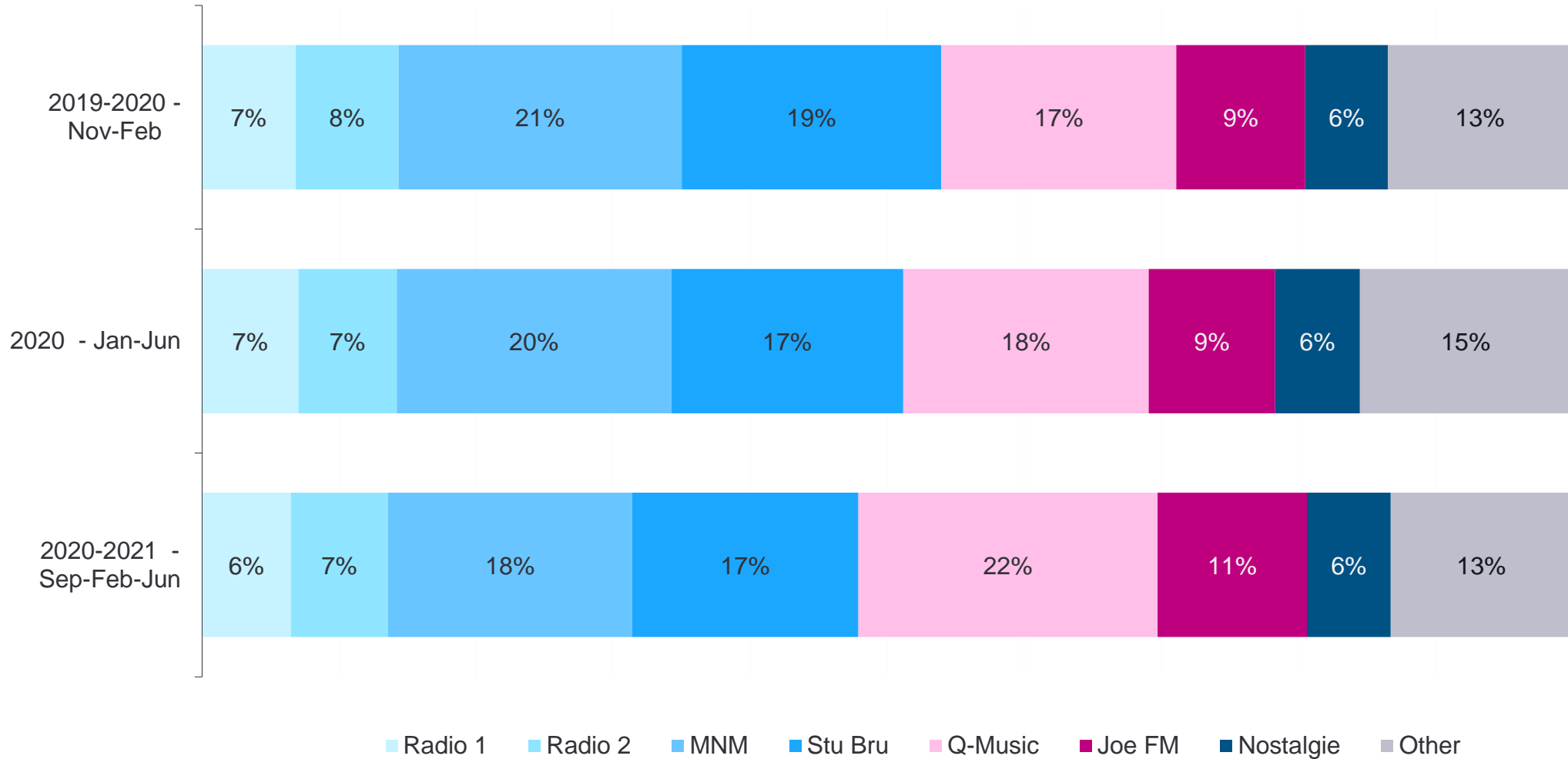
KEY RADIO FIGURES NORTH

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



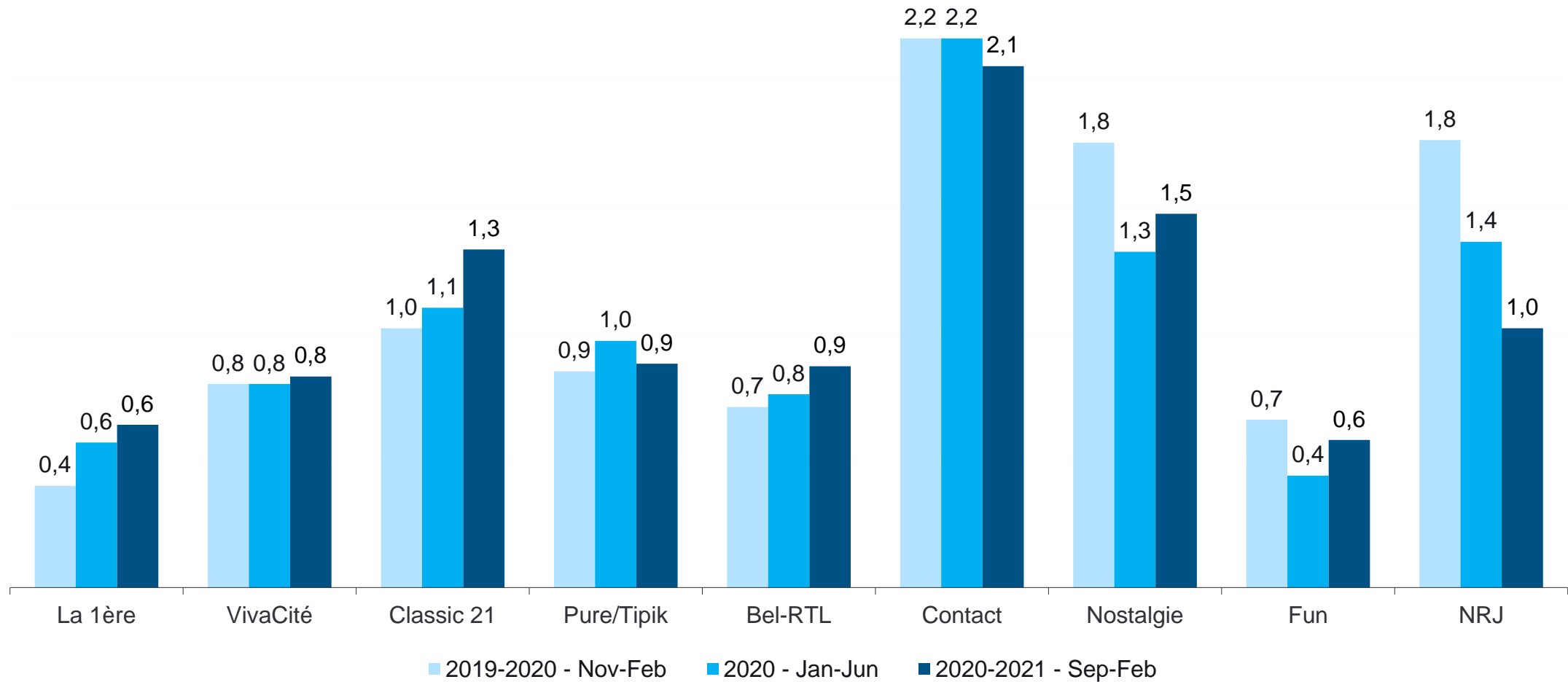
KEY RADIO FIGURES NORTH

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



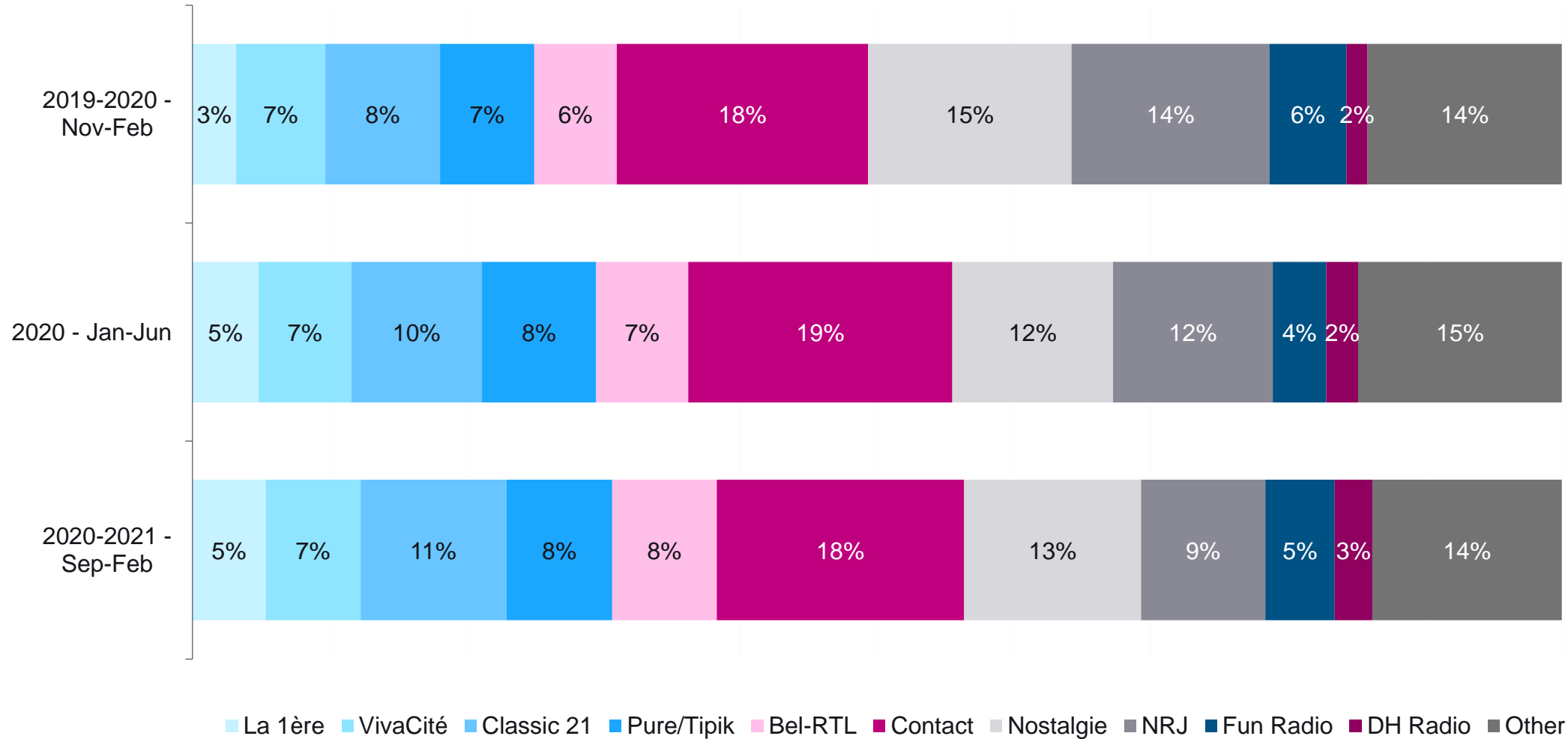
KEY RADIO FIGURES SOUTH

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	SOUTH	Circulation	vs 2019	Digital Part	vs 2019
Het Laatste Nieuws/De Nieuwe Gazet	230.054	↓ 95	14%	↑ 126	Le Soir	73.639	↑ 120	56%	↑ 172
Het Nieuwsblad/De Gentenaar	204.678	↓ 97	10%	↑ 116	L'Avenir	69.087	↓ 92	9%	↓ 76
De Standaard	110.868	↑ 106	36%	↑ 120	Sud Presse	69.052	↓ 94	21%	↑ 121
Het Belang van Limburg	84.900	↓ 98	12%	↑ 111	La Libre Belgique	40.956	↑ 109	39%	↑ 129
Gazet van Antwerpen	72.417	↓ 95	13%	↑ 109	La DH	31.928	↓ 91	21%	↑ 124
De Tijd	49.927	↑ 109	51%	↑ 110	L'Echo	16.917	↑ 101	53%	↑ 106
De Morgen	46.618	↓ 98	43%	↑ 109	Grenz Echo	8.449	↓ 88	12%	↑ 163
Total North	799.462	↓ 98	20%	↑ 119	Total South	310.028	→ 100	30%	↑ 138

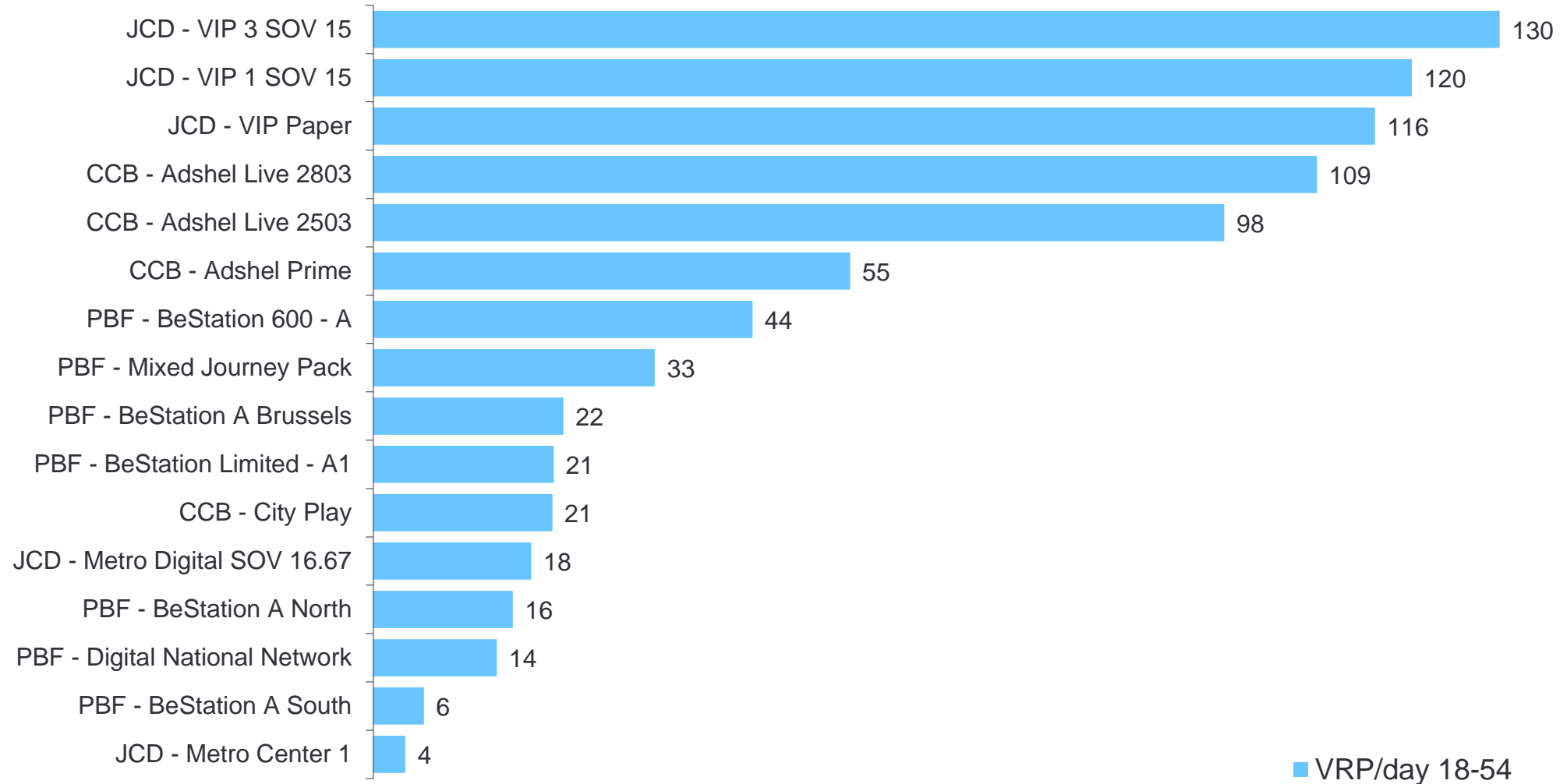
Key Print Figures - Magazines Circulation - Year 2020 (Paid + Free - digital sales included)

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

