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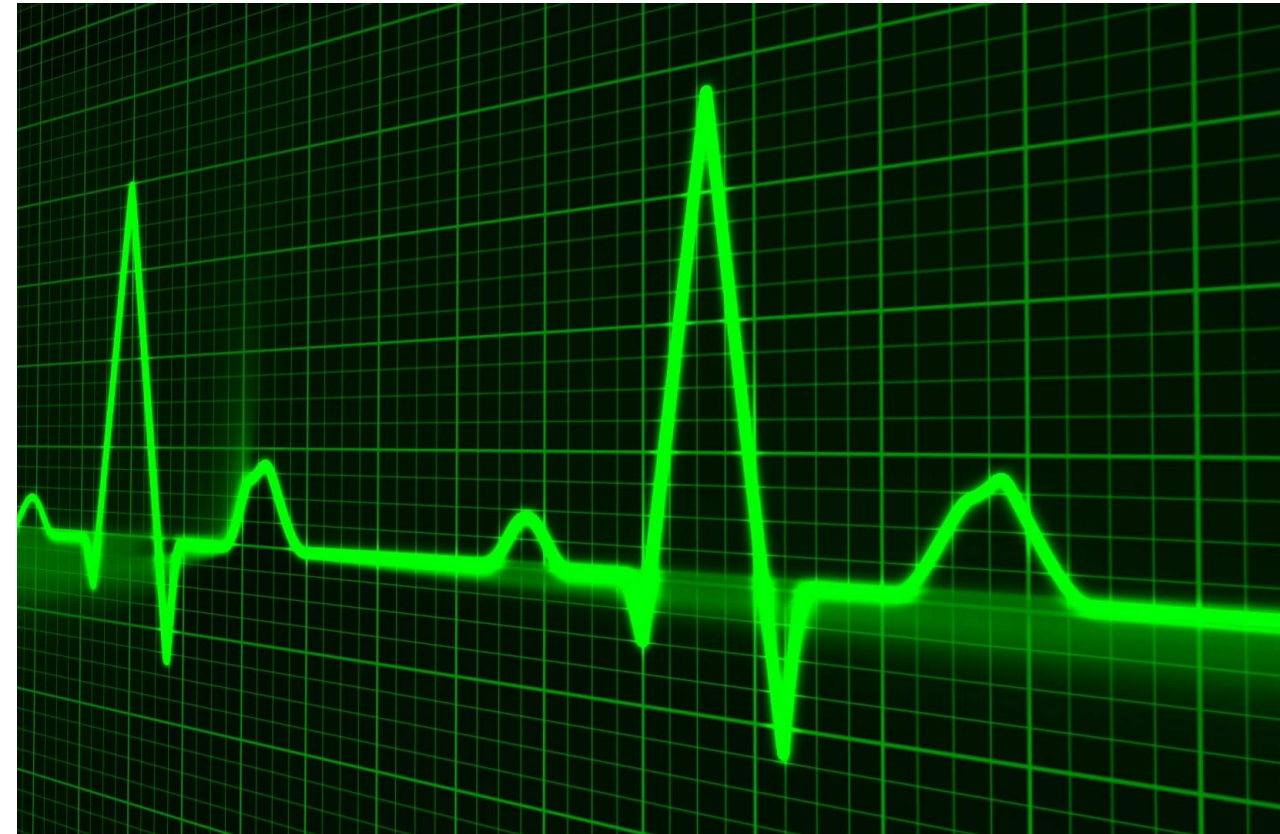
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

October 2022



Gross Media Investments Evolution

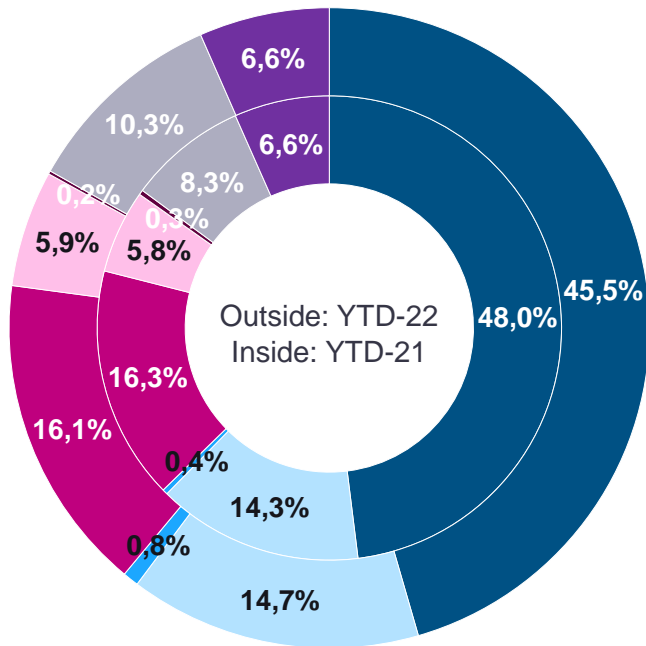
GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Sep 2022

NB : No Internet figures in MDB universe

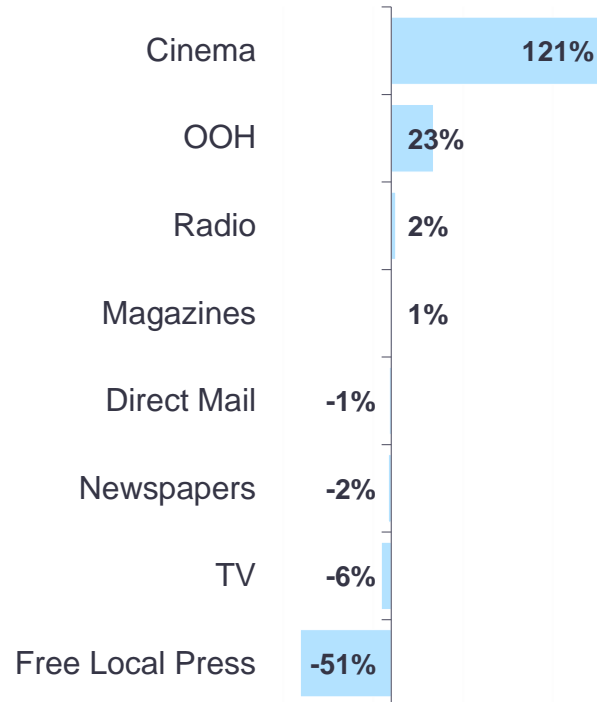
Market	National	North	South
<ul style="list-style-type: none"> € Mo vs YTD-21 % Region 	2.647,4 - 0,4% 100%	1.638,7 + 1,6% 62%	1.008,7 - 3,6% 38%

Media Mix Evol.

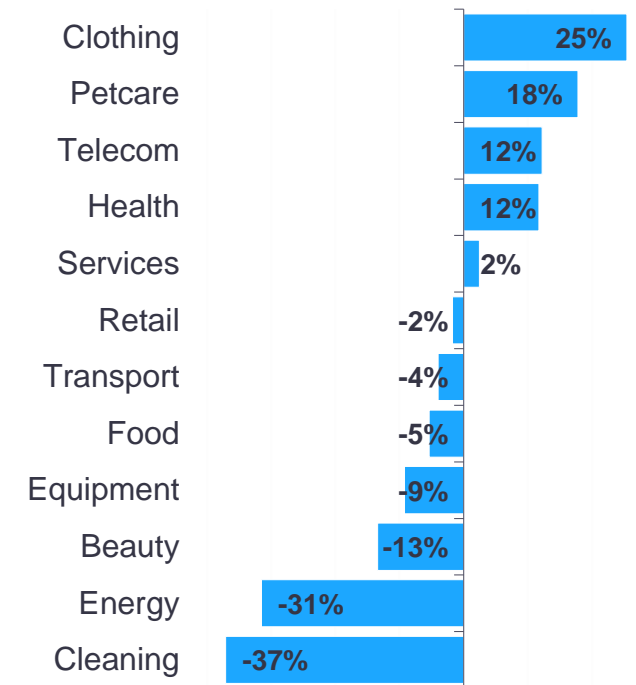
- TV
- Radio
- Cinema
- Newspapers
- Magazines
- Free Local Press
- OOH
- Direct Mail



Media Evol. (vs YTD-21)



EcoGroups Evol. (vs YTD-21)



MDB TOP 30 ADVERTISERS - Jan-Sep 2022

NB : No Internet figures in MDB universe

Rank	ADV.GROUP	Gross Inv.	vs 2021
1	COLRUYT GROUP	91,2	↓ 86
2	PROCTER & GAMBLE BENELUX	71,8	↓ 68
3	AHOLD DELHAIZE	58,7	↓ 95
4	THE COCA-COLA COMPANY	53,1	↓ 96
5	D'IETEREN GROUP	39,5	↓ 89
6	PROXIMUS GROUP	35,5	↑ 125
7	TELENET GROUP HOLDING	33,3	↑ 108
8	CARREFOUR GROUP	33,1	↑ 171
9	STELLANTIS	30,5	↑ 103
10	UNILEVER	29,9	↓ 71
11	RECKITT & BENCKISER	29,9	↓ 85
12	ALDI	25,6	↑ 124
13	LOTERIE NATIONALE	25,5	↑ 110
14	L'OREAL GROUP	24,2	→ 100
15	ORANGE	23,9	↑ 114

Rank	ADV.GROUP	Gross Inv.	vs 2021
16	AS WATSON	20,9	↓ 97
17	FERRERO	20,1	↓ 87
18	NETHYS	19,7	↓ 95
19	BMW GROUP BELGIUM	19,2	↓ 92
20	GROUPE 3 SUISES	18,4	↑ 114
21	THE WALT DISNEY COMPANY	17,6	↑ 127
22	RENAULT-NISSAN ALLIANCE	16,9	↓ 73
23	BNP-PARIBAS	16,2	↑ 183
24	3I GROUP	16,0	↑ 179
25	HENKEL	15,2	↑ 107
26	NESTLE GROUP	14,7	↓ 66
27	LIDL & CO	14,6	↓ 71
28	BELFIUS	14,5	↑ 137
29	COOLBLUE	14,4	↓ 86
30	HELLOFRESH	14,0	↓ 88

* : PSA + FCA



Key TV figures

Key TV figures North - Oct-22

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Oct-22	YTD-22	Oct-22	YTD-22	Oct-22	YTD-22
VTM	PRP 18-54	5,9	6,0	26,4	26,7	35,5	265,3
VTM2	PRP 18-54	1,7	1,4	7,4	6,4	8,1	62,5
VTM3	PRP 18-54	0,8	0,8	3,8	3,7	4,8	33,0
VTM4	MEN 18-54	0,5	0,5	2,8	2,7	3,2	30,6
Play4	PRP 18-54	3,0	2,4	13,4	10,9	25,5	134,2
Play5	PRP 18-54	0,9	0,9	4,0	3,9	7,2	52,4
Play6	PRP 18-54	0,4	0,4	1,9	2,0	9,9	58,2
Total TV	PRP 18-54	22,2	22,3				
Total TV	MEN 18-54	17,8	18,2				

Key TV indexes North - Oct-22

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	
		Oct-22	YTD-22	Oct-22	YTD-22	Oct-22	YTD-22
VTM	PRP 18-54	↓ 86	↑ 102	↓ 94	↑ 108	↓ 80	↓ 85
VTM2	PRP 18-54	↑ 109	↔ 101	↑ 118	↑ 107	↓ 62	↓ 77
VTM3	PRP 18-54	↓ 94	↓ 98	↑ 103	↑ 103	↓ 97	↓ 71
VTM4	MEN 18-54	↓ 64	↓ 89	↓ 71	↓ 95	↓ 65	↑ 102
Play4	PRP 18-54	↓ 94	↓ 91	↑ 103	↓ 96	↑ 102	↓ 91
Play5	PRP 18-54	↓ 86	↓ 84	↓ 94	↓ 89	↑ 108	↓ 96
Play6	PRP 18-54	↓ 89	↓ 80	↓ 98	↓ 85	↑ 175	↑ 169
Total TV	PRP 18-54	↓ 92	↓ 94				
Total TV	MEN 18-54	↓ 89	↓ 93				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

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

Source: CIM TV - Live +7 including guests

Variable	Channel	Daypart	YTD-19	YTD-20	YTD-21	YTD-22	22 vs 21
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	27,7%	30,2%	28,3%	26,9%	95
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	81,3%	79,1%	73,0%	71,2%	98
	Video on demand + Digital recorder	"	14,5%	17,2%	24,4%	28,2%	116
% Time shift viewing (4)	All Channels	"	29,2%	32,6%	33,7%	36,6%	109
	Main Channels (5)	"	33,3%	36,6%	38,7%	41,7%	108
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	85	84	80	82	
	Main channels (5) - TSV	"	33	37	35	41	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	95	97	80	72	90
	All TV channels (TSV)	"	31	37	33	33	98
	All TV channels (Live + TSV)	"	126	133	114	105	92
	Other TV Screen Usage	"	37	46	53	54	101
	Total TV Screen Usage	"	163	180	167	159	95

Key TV figures South - Oct-22

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Oct-22	YTD-22	Oct-22	YTD-22	Oct-22	YTD-22
RTL-TVI	PRP 18-54	4,9	4,8	25,5	25,1	25,7	181,9
Club-RTL	MEN 18-54	1,0	0,9	6,8	6,2	3,8	26,4
Plug-RTL	ALL 15-34	0,3	0,5	3,8	4,9	2,3	16,7
TF1	PRP 18-54	3,1	2,4	16,5	12,4	6,0	47,8
La Une	PRP 18-54	2,6	2,7	13,4	14,2	12,1	81,7
Tipik	PRP 18-54	0,8	1,0	4,0	5,0	2,9	20,9
AB3	PRP 18-44	0,9	1,0	6,4	6,5	4,2	24,2
TTV	PRP 18-54	19,1	19,3				
TTV	PRP 18-44	14,7	15,6				
TTV	ALL 15-34	7,8	9,2				
TTV	MEN 18-54	14,5	14,5				

Key TV indexes South - Oct-22

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	
		Oct-22	YTD-22	Oct-22	YTD-22	Oct-22	YTD-22
RTL-TV1	PRP 18-54	↓ 86	↓ 90	↘ 99	↑ 102	↓ 76	↓ 82
Club-RTL	MEN 18-54	→ 100	↓ 91	↑ 112	↑ 106	↓ 80	↓ 81
Plug-RTL	ALL 15-34	↓ 62	↓ 92	↓ 89	↑ 115	↓ 81	↓ 90
TF1	PRP 18-54	↓ 98	↓ 87	↑ 113	↘ 99	↓ 73	↓ 91
La Une	PRP 18-54	↓ 80	↓ 74	↓ 93	↓ 84	↓ 96	↓ 90
Tipik	PRP 18-54	↓ 67	↓ 63	↓ 77	↓ 72	↓ 85	↓ 68
AB3	PRP 18-44	↓ 81	↓ 83	→ 100	↓ 96	↑ 107	↑ 106
TTV	PRP 18-54	↓ 87	↓ 88				
TTV	PRP 18-44	↓ 81	↓ 87				
TTV	ALL 15-34	↓ 70	↓ 80				
TTV	MEN 18-54	↓ 89	↓ 86				

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

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

Source: CIM TV - Live +7 including guests

Variable	Channel	Daypart	YTD-19	YTD-20	YTD-21	YTD-22	22 vs 21
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	30,7%	33,0%	30,3%	28,4%	94
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	71,9%	67,2%	63,7%	59,5%	93
	Video on demand + Digital recorder	"	21,9%	27,6%	33,4%	40,2%	120
% Time shift viewing (4)	All Channels	"	21,7%	24,1%	26,2%	25,8%	98
	Main Channels (5)	"	22,2%	24,4%	26,8%	27,4%	102
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	86	88	86	86	
	Main channels (5) - TSV	"	51	50	55	55	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	121	116	97	88	90
	All TV channels (TSV)	"	27	30	28	24	87
	All TV channels (Live + TSV)	"	148	145	125	112	90
	Other TV Screen Usage	"	66	84	83	89	107
	Total TV Screen Usage	"	214	229	209	202	97



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Oct-22

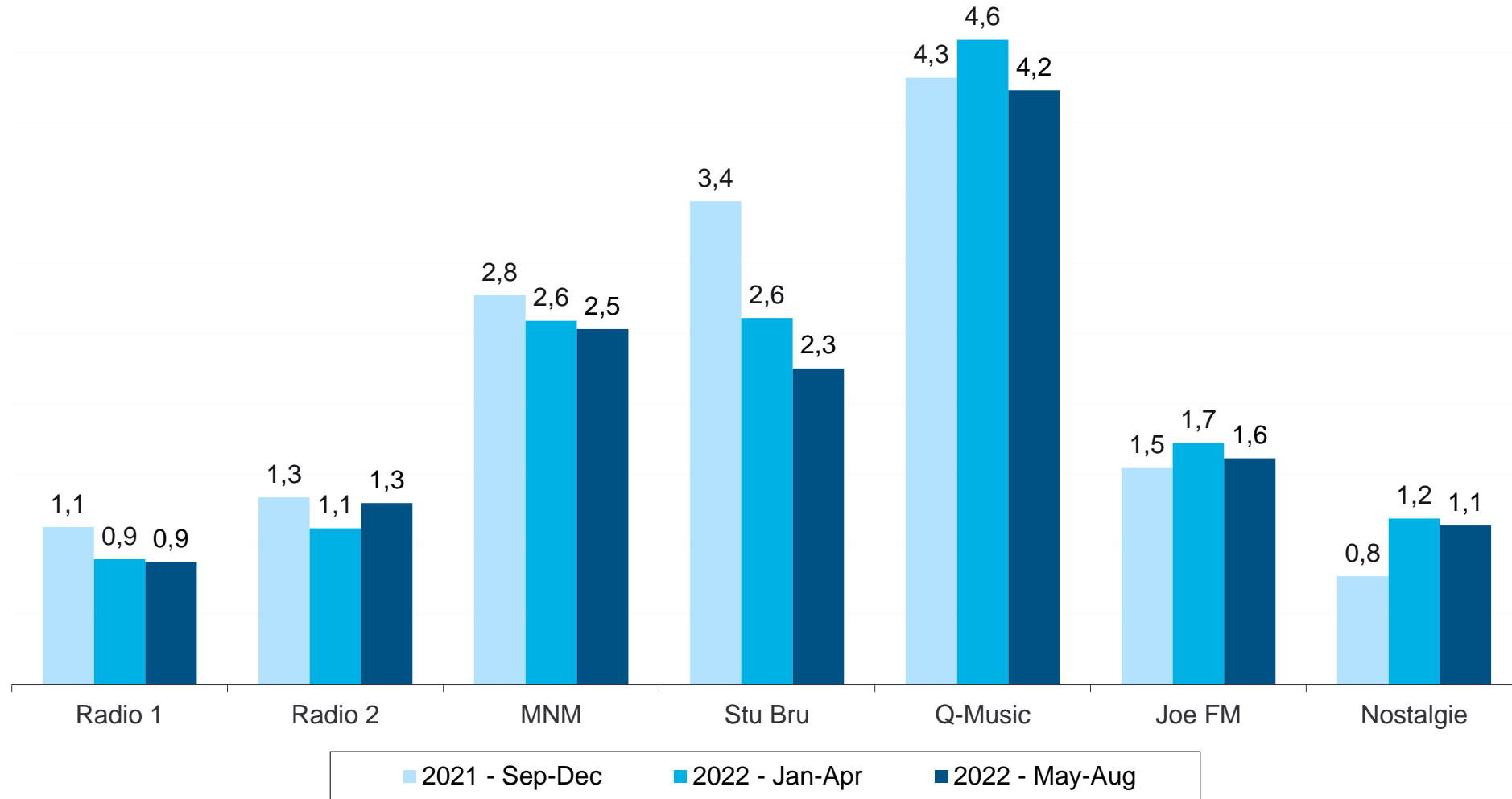
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.095.484	11	DH.be	1.515.192
2	Nieuwsblad	2.648.604	12	De Morgen	1.373.064
3	Sudinfo	2.186.772	13	Humo The Wild Site	1.338.792
4	VRT	2.068.584	14	L'Avenir.net	1.336.272
5	RTBF.be	1.783.908	15	Metrotime	1.205.988
6	RTL.be	1.735.356	16	Knack/Le Vif	1.182.636
7	2dehands.be/2ememain.be	1.683.780	17	De Standaard	1.172.052
8	Le Soir	1.655.220	18	La Libre.be	1.083.096
9	Immoweb	1.613.388	19	7sur7.be	1.083.012
10	Gazet van Antwerpen	1.609.104	20	Flair	970.536



Key Radio figures

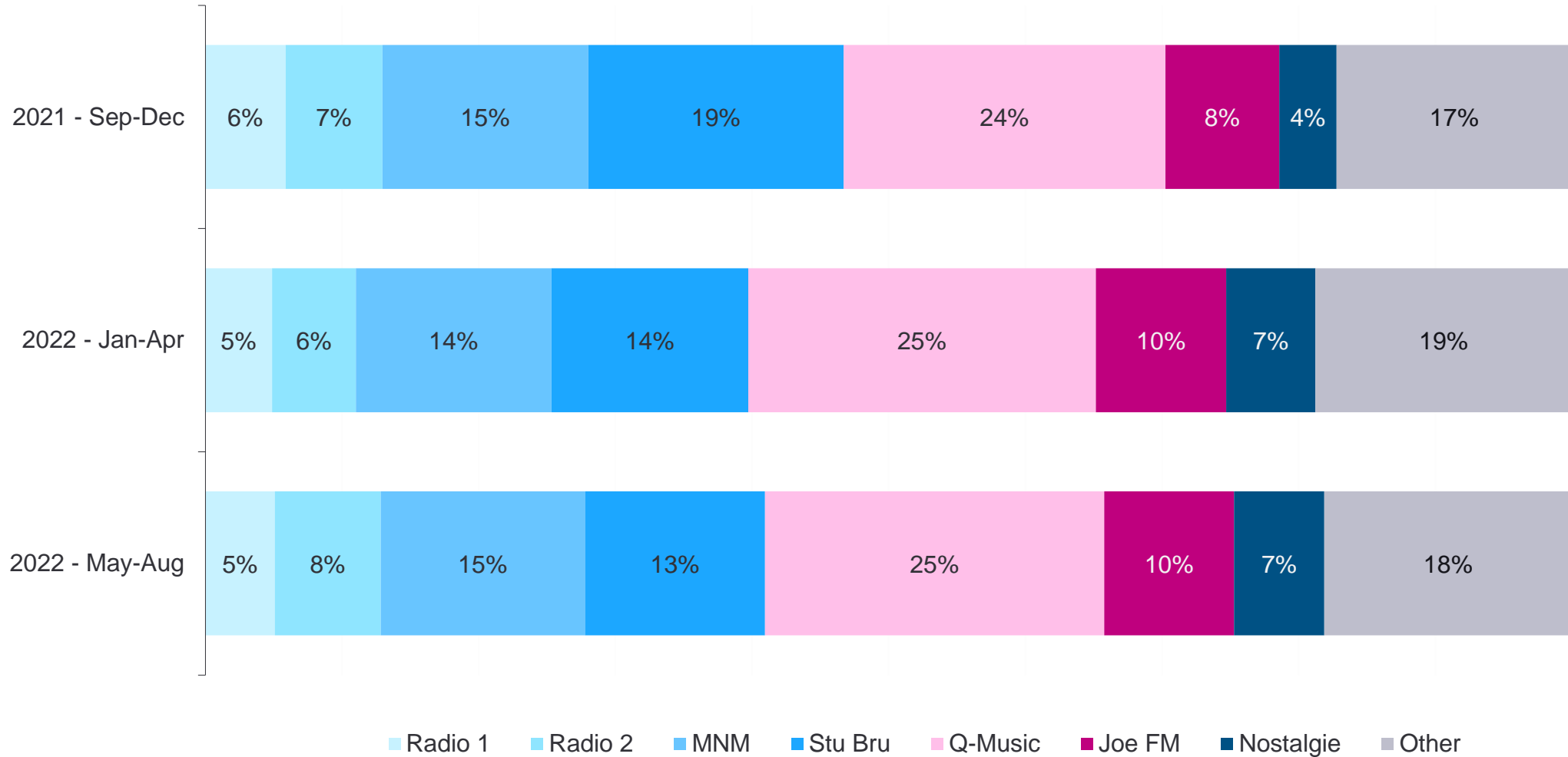
KEY RADIO FIGURES NORTH

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



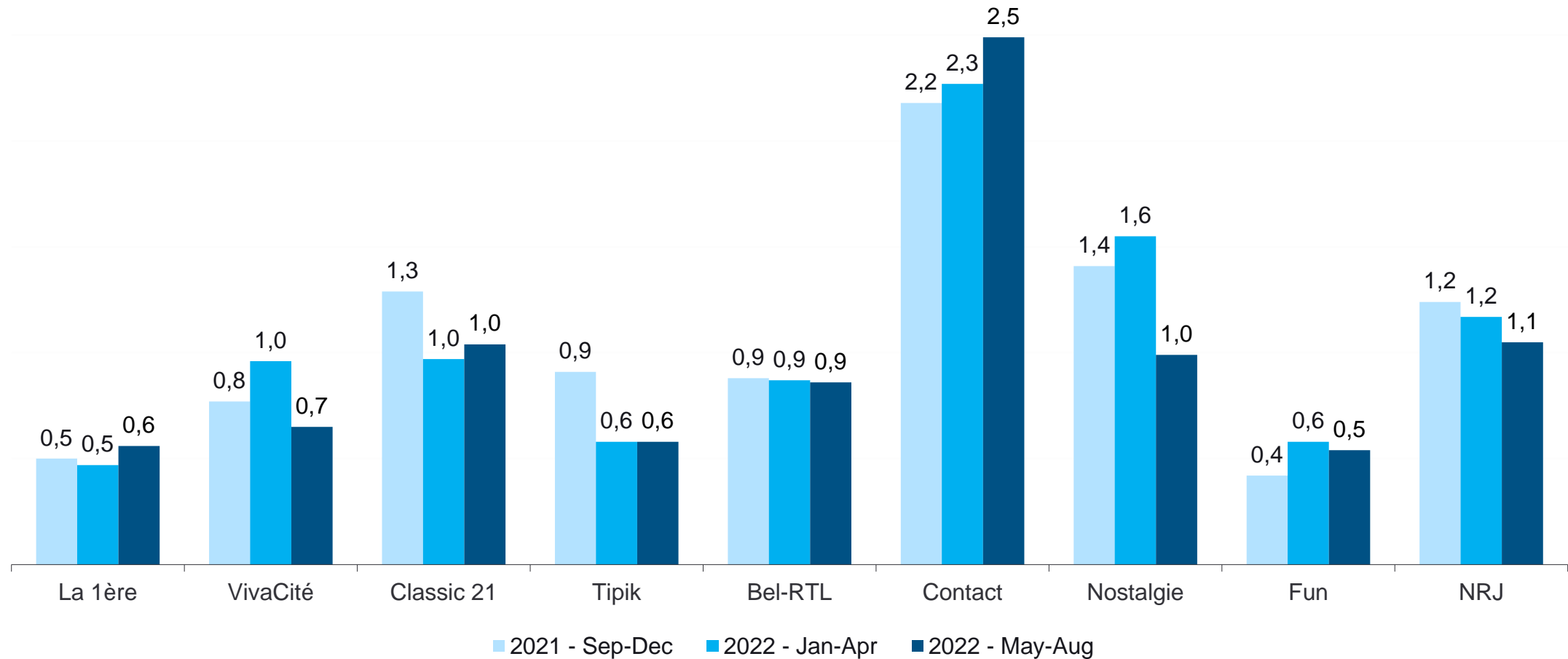
KEY RADIO FIGURES NORTH

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



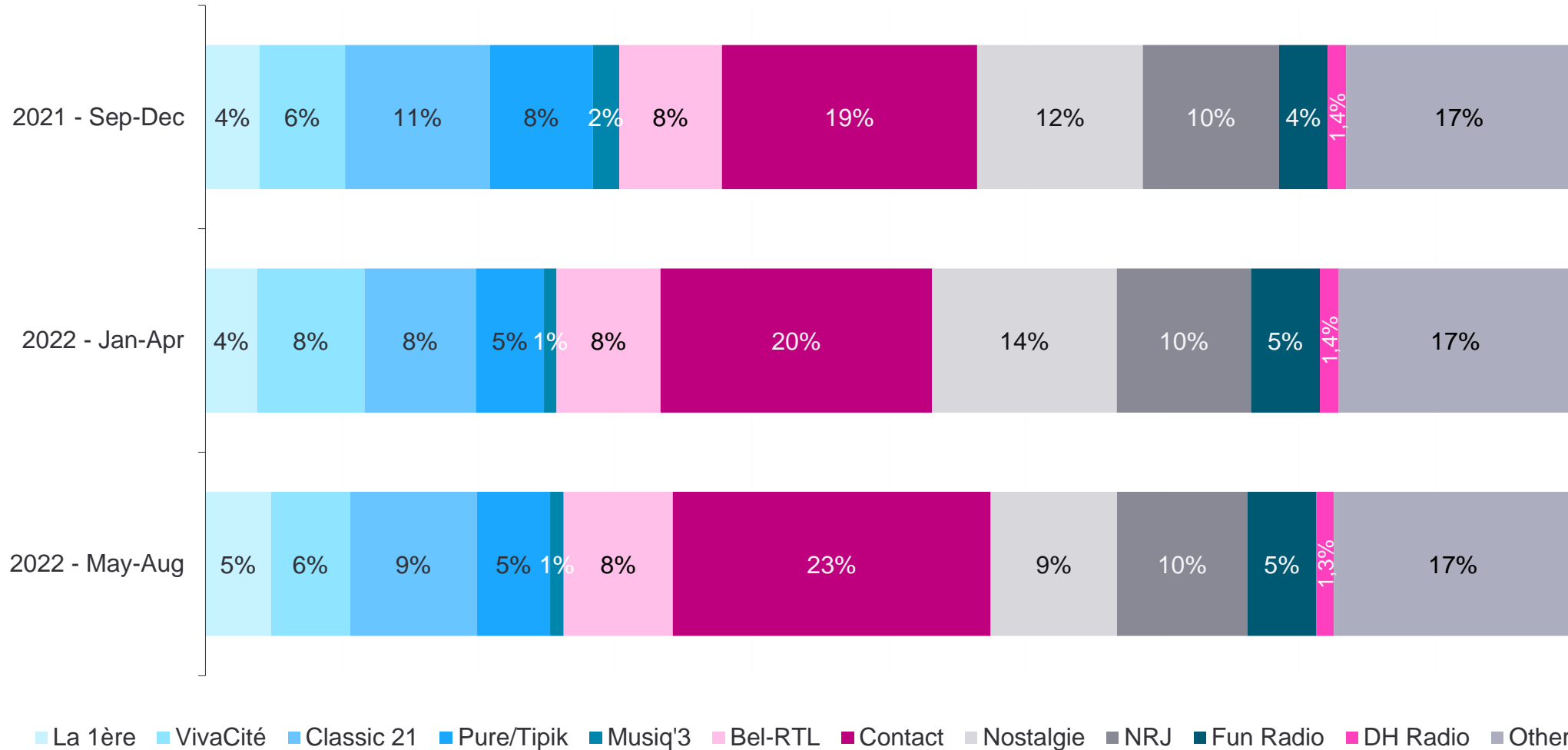
KEY RADIO FIGURES SOUTH

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 2021 (Paid + Free - digital sales included)

NORTH	Circulation	vs 2020	Digital Part	vs 2020
Het Laatste Nieuws/De Nieuwe Gazet	226.076	↓ 98	18%	↑ 127
Het Nieuwsblad/De Gentenaar	200.875	↓ 98	12%	↑ 128
De Standaard	113.616	↑ 103	41%	↑ 113
Het Belang van Limburg	84.206	↓ 99	15%	↑ 123
Gazet van Antwerpen	70.008	↓ 97	16%	↑ 121
De Tijd	53.206	↑ 107	55%	↑ 108
De Morgen	48.293	↑ 104	48%	↑ 109
Total North	796.280	→ 100	24%	↑ 119

SOUTH	Circulation	vs 2020	Digital Part	vs 2020
Le Soir	75.503	↑ 102	61%	↑ 111
L'Avenir	65.713	↓ 95	10%	↑ 110
SudInfo	64.429	↓ 93	21%	↑ 102
La Libre Belgique	40.650	→ 100	42%	↑ 111
La DH	29.776	↓ 93	23%	↑ 112
L'Echo	16.914	↑ 101	57%	↑ 108
Grenz Echo	8.035	↓ 96	17%	↑ 133
Total South	301.020	↓ 97	34%	↑ 112

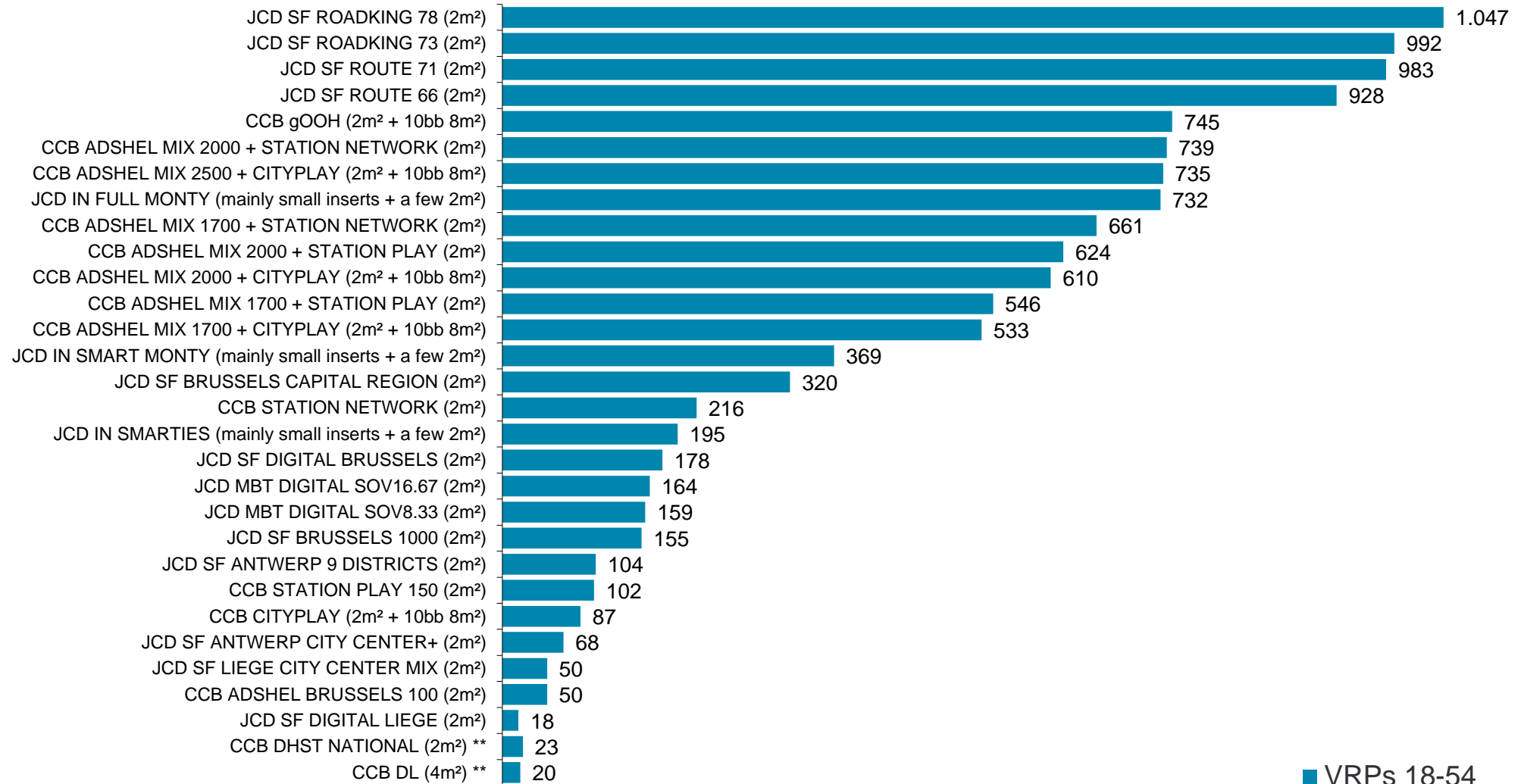
Key Print Figures - Magazines Circulation - Year 2021 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages		TOTAL	
	Circulation	vs 2020	Circulation	vs 2020	Circulation	vs 2020	Circulation	vs 2020
Television	539.671	↓ 94	328.592	↓ 95			868.263	↓ 94
Women	290.956	↓ 94	121.574	↓ 92			412.530	↓ 94
Lifestyle Culture & Travel	115.148	↑ 101	65.710	↓ 96	188.696	↑ 102	369.554	↑ 101
Business & News	97.536	↓ 95	125.958	↓ 98	44.578	↑ 103	268.072	↓ 98
Generation (Youth/Senior)			12.816	↓ 95	116.634	↑ 102	129.450	↑ 101
Men	21.772	↓ 93	11.159	↓ 94	32.231	↑ 105	65.162	↓ 99
Build & Deco	37.360	↓ 84	17.043	↓ 79	9.320	↓ 92	63.723	↓ 84
TOTAL	1.102.443	↓ 95	682.852	↓ 95	391.459	↑ 102	2.176.754	↓ 96



Out Of Home Ratings

OOH Ratings - Small sized billboards networks VRP's* on ALL 18-54 - 7 days (except **) - National



■ VRPs 18-54

OOH Ratings - Average & large sized billboards networks VRP's* on ALL 18-54 - 14 days (except **) - National

