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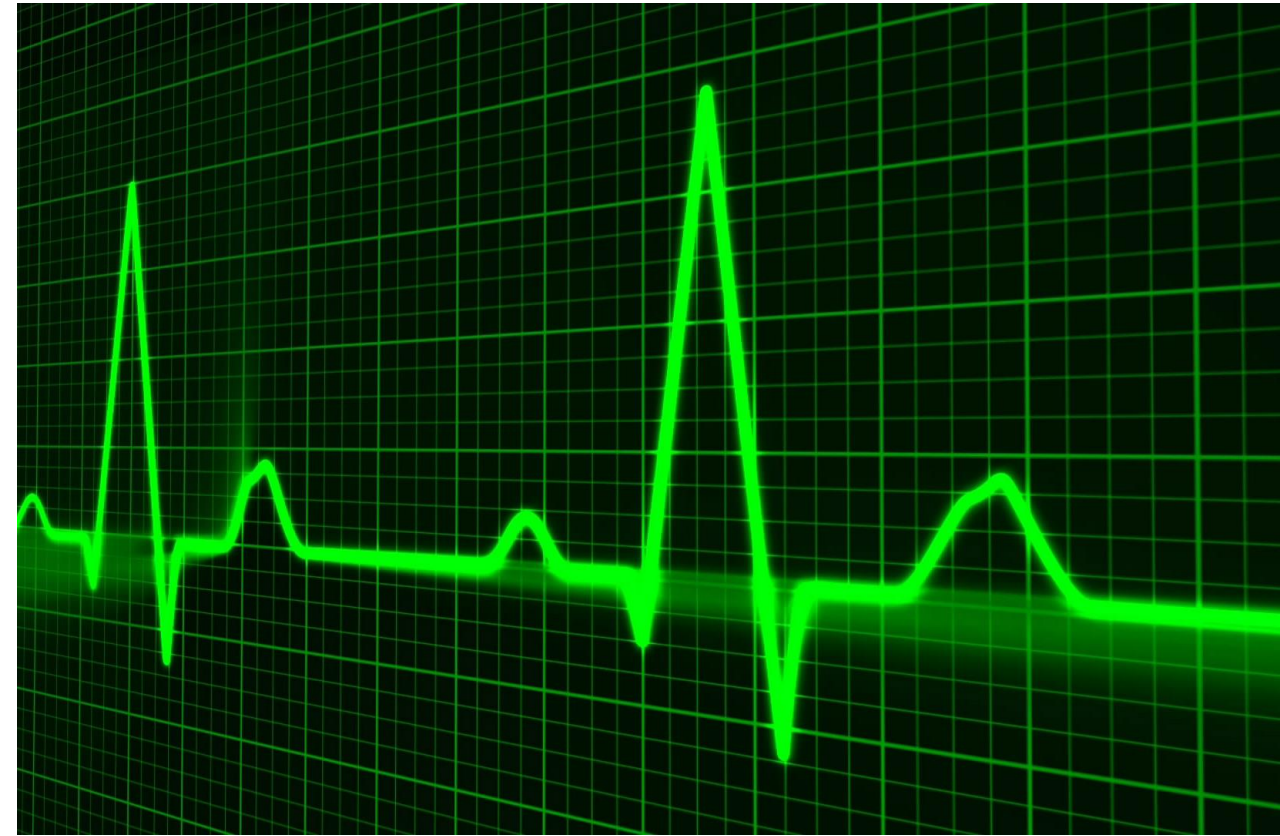
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

January 2021



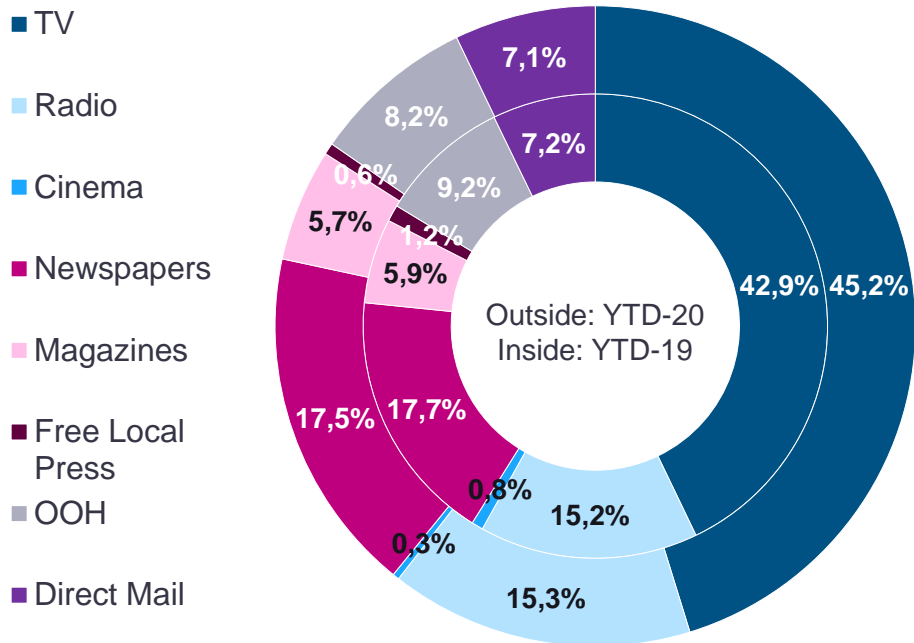
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Dec 2020

NB : No Internet figures in MDB for 2019 & 2020

Market	National	North	South
<ul style="list-style-type: none"> € Mo vs YTD-19 % Region 	3.312,5 - 14,8% 100%	1.993,2 - 15,9% 60%	1.319,4 - 13,1% 40%

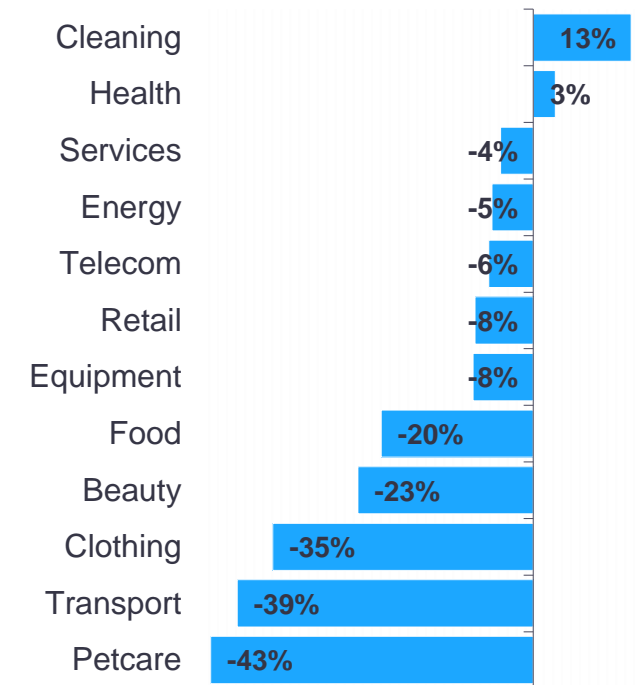
Media Mix Evol.



Media Evol. (vs YTD-19)



EcoGroups Evol. (vs YTD-19)



MDB TOP 30 ADVERTISERS - Jan-Dec 2020

NB : No Internet figures in MDB for 2019 & 2020

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
1	COLRUYT GROUP	132,3	↑ 124
2	PROCTER & GAMBLE	114,2	↔ 101
3	AHOLD DELHAIZE	74,7	↑ 139
4	RECKITT & BENCKISER	46,3	↓ 91
5	UNILEVER	44,4	↓ 91
6	THE COCA-COLA COMPANY	44,2	↓ 60
7	TELENET GROUP	42,2	↑ 103
8	ALDI	40,9	↑ 137
9	PROXIMUS GROUP	38,5	↓ 76
10	ORANGE	37,1	↓ 92
11	LOTERIE NATIONALE	33,3	↑ 116
12	D'IETEREN GROUP	32,4	↓ 46
13	NESTLE GROUP	31,9	↑ 149
14	CARREFOUR GROUP	30,5	↓ 76
15	NETHYS	29,1	↓ 95

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
16	LIDL & CO	27,4	↑ 117
17	PSA GROUPE	27,1	↓ 46
18	AS WATSON	26,5	↑ 118
19	L'OREAL GROUP	26,3	↓ 81
20	RENAULT-NISSAN ALLIANCE	25,6	↓ 60
21	FERRERO	25,6	↓ 62
22	PEPSICO	24,7	↑ 145
23	THE WALT DISNEY COMPANY	24,0	↓ 89
24	BMW GROUP BELGIUM	22,6	↑ 107
25	VINTED	21,4	↓ 69
26	GROUPE 3 SUISSES	20,5	↑ 104
27	BEIERSDORF	20,5	↑ 104
28	MONDELEZ INTERNATIONAL	20,4	↓ 91
29	BNP-PARIBAS	19,6	↑ 135
30	HENKEL	18,7	↑ 184



Key TV figures

Key TV figures North - Jan-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Jan-21	YTD	Jan-21	YTD	Jan-21	YTD
VTM	PRP 18-54	6,4	6,4	22,5	22,5	710	710
VTM2	PRP 18-44	1,5	1,5	5,9	5,9	732	732
VTM3	PRP 18-54	1,2	1,2	4,3	4,3	548	548
VTM4	MEN 18-54	0,7	0,7	3,1	3,1	<i>Package</i>	<i>Package</i>
Play4	PRP 18-54	3,5	3,5	12,4	12,4	603	603
Play5	PRP 18-54	1,2	1,2	4,3	4,3	724	724
Play6	PRP 18-54	0,7	0,7	2,3	2,3	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	28,5	28,5				
Total TV	PRP 18-44	24,7	24,7				
Total TV	MEN 18-54	23,3	23,3				

Key TV indexes North - Jan-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	
		Jan-21	YTD	Jan-21	YTD	Jan-21	YTD
VTM	PRP 18-54	↓ 96	↓ 96	↓ 92	↓ 92	✗ 114	✗ 114
VTM2	PRP 18-44	↓ 86	↓ 86	↓ 82	↓ 82	✗ 107	✗ 107
VTM3	PRP 18-54	↓ 91	↓ 91	↓ 88	↓ 88	✗ 107	✗ 107
VTM4	MEN 18-54	↑ 131	↑ 131	↑ 128	↑ 128	Package	Package
Play4	PRP 18-54	↑ 141	↑ 141	↑ 135	↑ 135	✓ 89	✓ 89
Play5	PRP 18-54	↓ 82	↓ 82	↓ 79	↓ 79	✗ 130	✗ 130
Play6	PRP 18-54	↑ 140	↑ 140	↑ 135	↑ 135	Package	Package
Total TV	PRP 18-54	↑ 104	↑ 104				
Total TV	PRP 18-44	↑ 104	↑ 104				
Total TV	MEN 18-54	↑ 102	↑ 102				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: January - 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%	31,8%	30,6%	33,4%	109
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	82,7%	81,3%	80,2%	74,3%	93
	VHS + DVD player + Blu-Ray	"	4,0%	2,7%	2,3%	2,8%	122
	Video on demand + Digital recorder	"	11,8%	13,7%	16,2%	21,6%	133
	Game console and other devices (3)	"	1,5%	2,2%	1,3%	1,3%	95
% Time shift viewing (4)	All Channels	"	22,2%	28,9%	30,0%	32,1%	107
	Main Channels (5)	"	22,9%	30,7%	30,3%	34,6%	114
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	87	88	85	85	
	Main channels (5) - TSV	"	36	35	37	38	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	118	108	101	96	95
	All TV channels (TSV)	"	29	36	35	38	108
	All TV channels (Live + TSV)	"	148	143	136	134	98
	Other TV Screen Usage	"	40	43	44	59	136
	Total TV Screen Usage	"	187	186	180	193	107

Key TV figures South - Jan-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Jan-21	YTD	Jan-21	YTD	Jan-21	YTD
RTL-TVI	PRP 18-54	6,4	6,4	25,7	25,7	650	650
Club-RTL	MEN 18-54	1,0	1,0	5,0	5,0	599	599
Plug-RTL	ALL 15-34	0,6	0,6	4,4	4,4	734	734
TF1	PRP 18-54	3,2	3,2	12,9	12,9	507	507
La Une	PRP 18-54	4,3	4,3	17,1	17,1	522	522
Tipik	PRP 18-54	1,4	1,4	5,5	5,5	543	543
AB3	PRP 18-44	1,1	1,1	5,6	5,6	672	672
TTV	PRP 18-54	25,1	25,1				
TTV	PRP 18-44	19,4	19,4				
TTV	ALL 15-34	12,7	12,7				
TTV	MEN 18-54	19,3	19,3				

Key TV indexes South - Jan-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	
		Jan-21	YTD	Jan-21	YTD	Jan-21	YTD
RTL-TV1	PRP 18-54	↑ 103	↑ 103	↑ 106	↑ 106	✗ 112	✗ 112
Club-RTL	MEN 18-54	↓ 93	↓ 93	↓ 90	↓ 90	✓ 92	✓ 92
Plug-RTL	ALL 15-34	↓ 75	↓ 75	↓ 88	↓ 88	✗ 120	✗ 120
TF1	PRP 18-54	↔ 101	↔ 101	↑ 104	↑ 104	✗ 106	✗ 106
La Une	PRP 18-54	↑ 109	↑ 109	↑ 113	↑ 113	✓ 97	✓ 97
Tipik	PRP 18-54	↓ 91	↓ 91	↓ 93	↓ 93	✗ 116	✗ 116
AB3	PRP 18-44	↓ 50	↓ 50	↓ 56	↓ 56	✗ 136	✗ 136
TTV	PRP 18-54	↓ 97	↓ 97				
TTV	PRP 18-44	↓ 89	↓ 89				
TTV	ALL 15-34	↓ 85	↓ 85				
TTV	MEN 18-54	↑ 103	↑ 103				

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: January - 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	35,9%	34,9%	33,8%	34,6%	102
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	75,0%	73,6%	67,2%	64,6%	96
	VHS + DVD player + Blu-Ray	"	7,0%	6,3%	3,6%	4,1%	114
	Video on demand + Digital recorder	"	17,1%	19,0%	27,9%	30,3%	109
	Game console and other devices (3)	"	0,9%	1,2%	1,4%	1,0%	71
% Time shift viewing (4)	All Channels	"	19,6%	21,6%	24,8%	27,0%	109
	Main Channels (5)	"	21,3%	22,7%	25,6%	28,1%	109
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	89	91	91	
	Main channels (5) - TSV	"	49	52	50	57	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	147	136	116	109	94
	All TV channels (TSV)	"	29	31	31	33	105
	All TV channels (Live + TSV)	"	175	167	147	142	96
	Other TV Screen Usage	"	66	71	81	90	110
	Total TV Screen Usage	"	241	238	228	231	101



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Jan-21

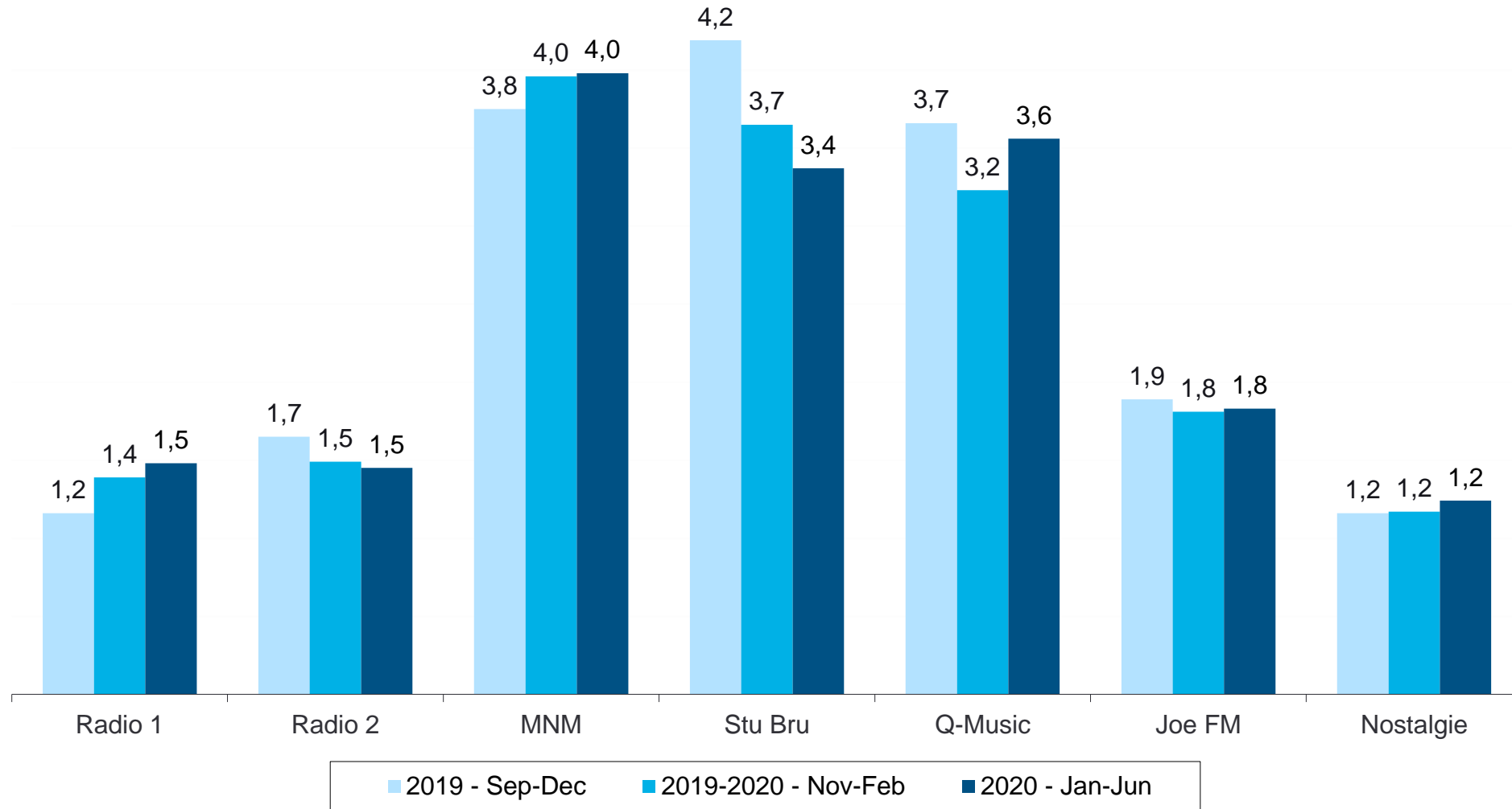
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.284.400	11	Immoweb	1.742.580
2	Nieuwsblad	3.020.136	12	De Standaard	1.611.876
3	VRT	2.711.856	13	La Libre.be	1.533.924
4	RTBF.be	2.282.700	14	De Morgen	1.524.096
5	Sudinfo	2.229.948	15	L'Avenir.net	1.355.004
6	DH.be	1.962.912	16	Flair	1.329.972
7	2dehands.be/2ememain.be	1.832.040	17	Een	1.314.264
8	RTL.be	1.804.488	18	7sur7.be	1.271.844
9	Le Soir	1.793.484	19	Vlan.be	1.107.960
10	Knack/Le Vif	1.745.520	20	Sporza	1.090.152



Key Radio figures

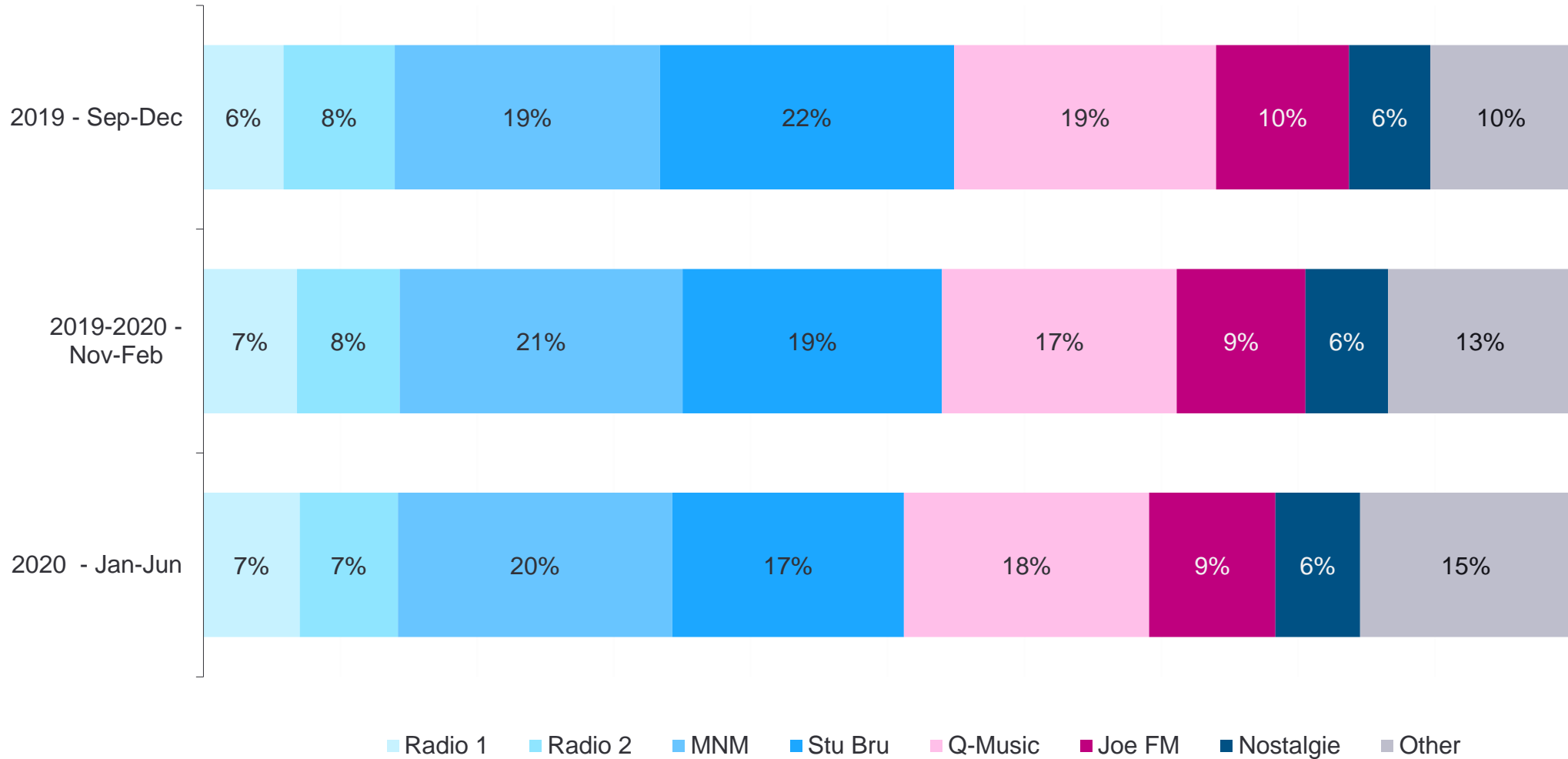
KEY RADIO FIGURES NORTH

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



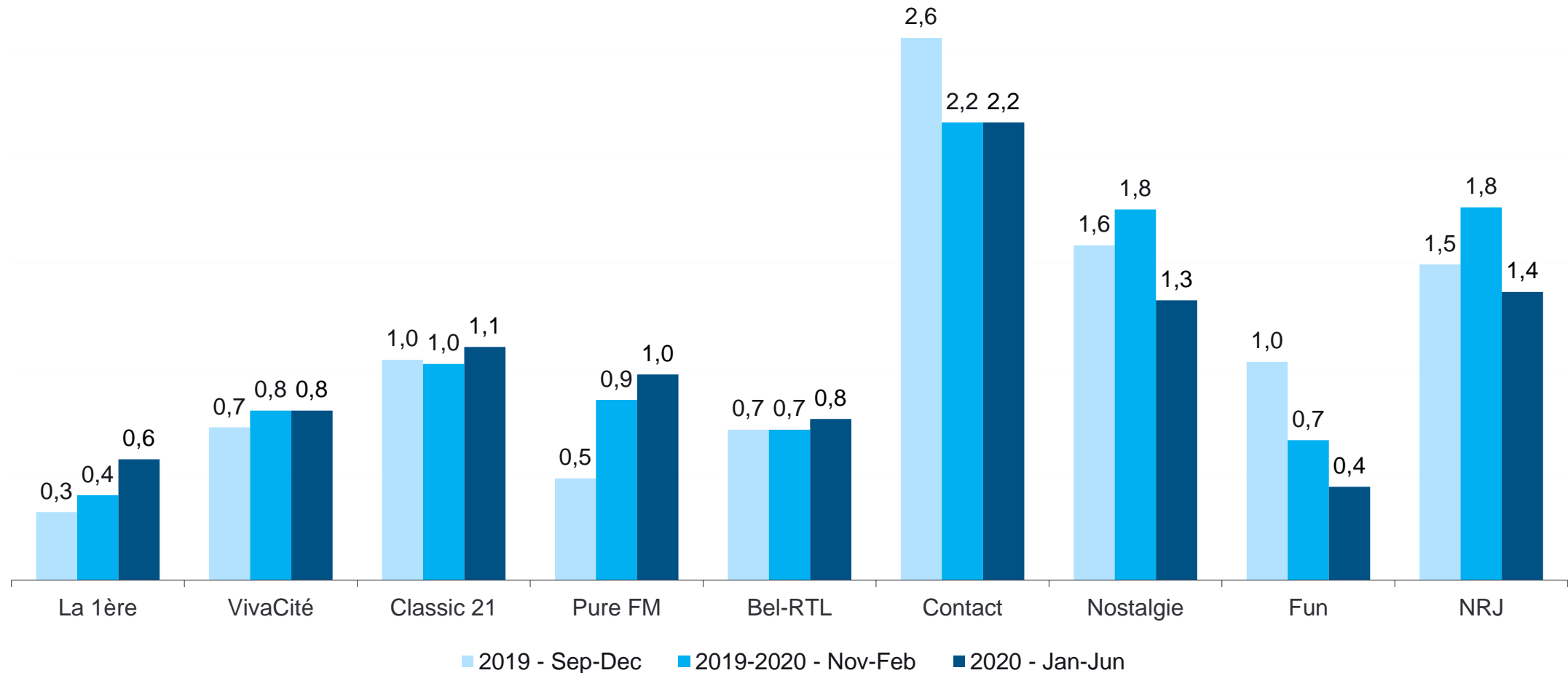
KEY RADIO FIGURES NORTH

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



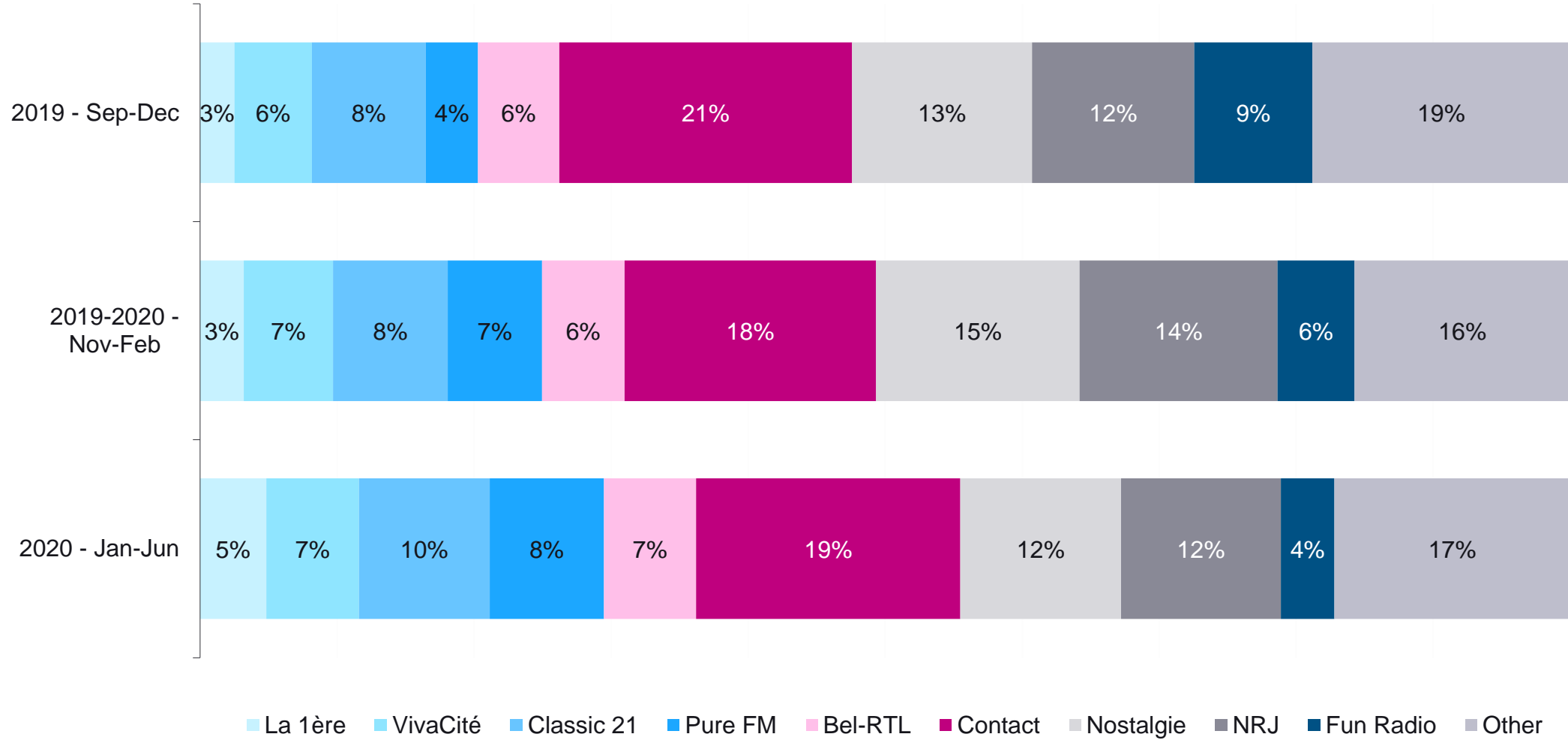
KEY RADIO FIGURES SOUTH

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

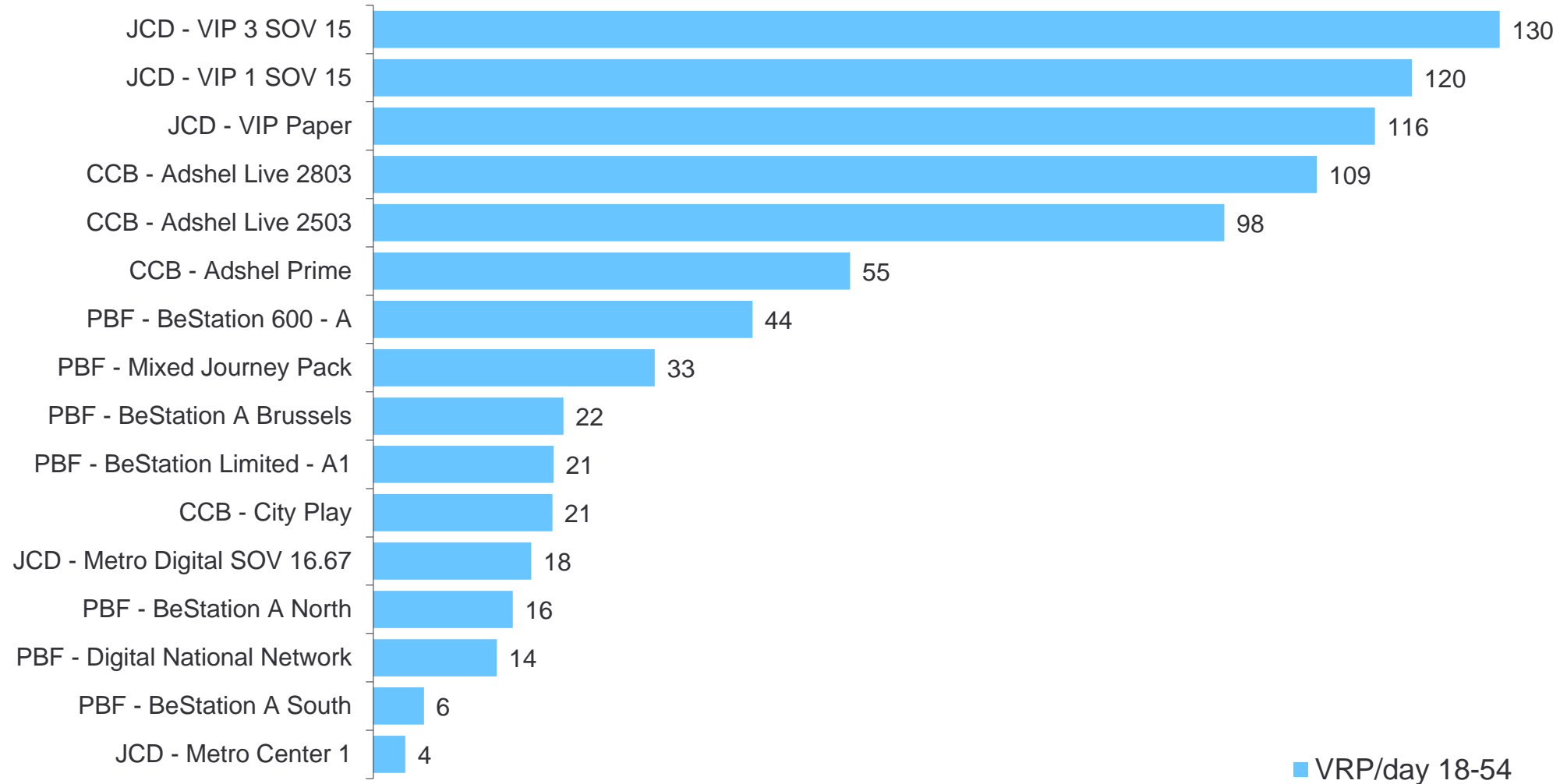
Key Print Figures - Magazines Circulation - Year 2019 (Paid + Free - digital sales included)

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

