



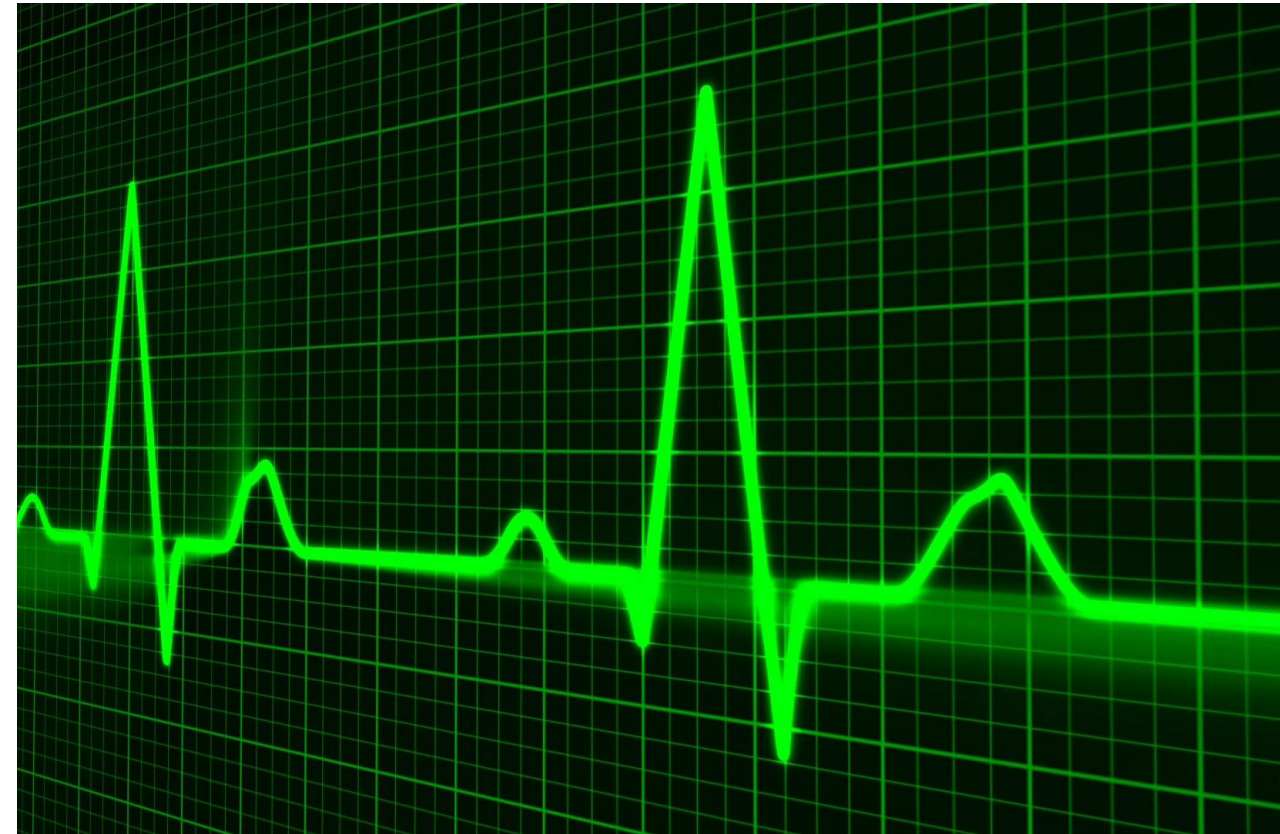
space  
CONNECTIONS AGENCY



intelligence  
Market & Business

# MARKET PERFORMANCES BAROMETER

July 2021



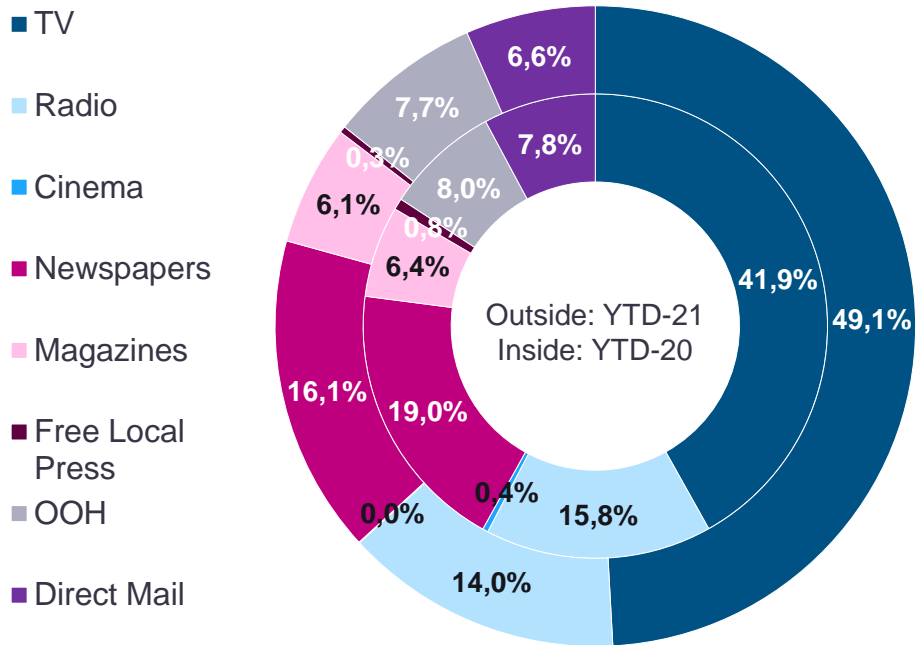
# Gross Media Investments Evolution

# GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Jun 2021

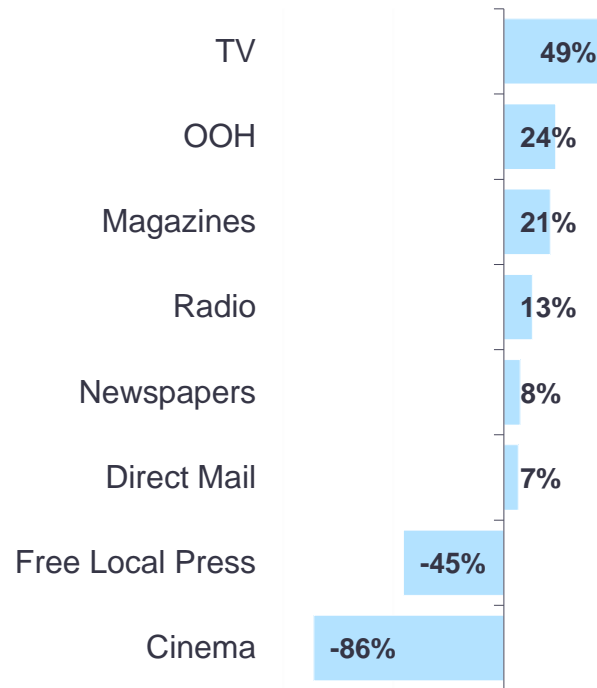
NB : No Internet figures in MDB for 2020 & 2021

Market	National	North	South
<ul style="list-style-type: none"> <li>€ Mo</li> <li>vs YTD-20</li> <li>% Region</li> </ul>	1.768,7 + 27,1% 100%	1.082,6 + 27,2% 61%	686,1 + 26,9% 39%

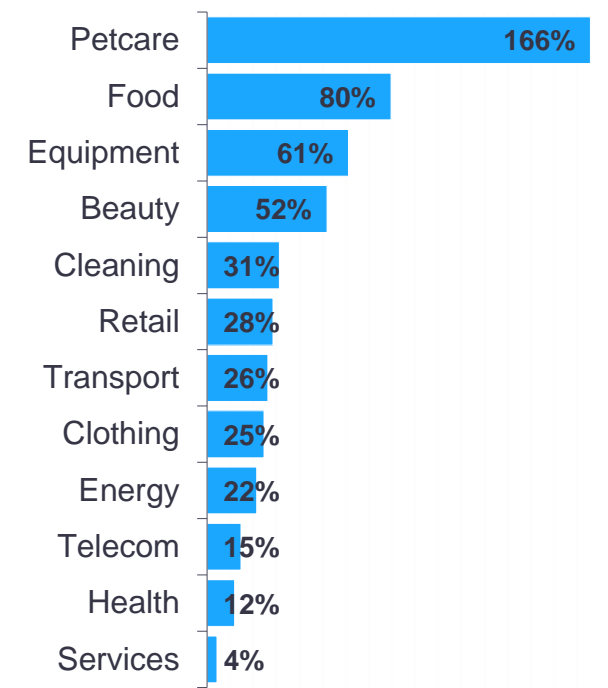
**Media Mix Evol.**



**Media Evol. (vs YTD-20)**



**EcoGroups Evol. (vs YTD-20)**



# MDB TOP 30 ADVERTISERS - Jan-Jun 2021

NB : No Internet figures in MDB for 2020 & 2021

Rank	ADV.GROUP	Gross Inv.	vs 2020
1	PROCTER & GAMBLE BENELUX	69,1	↑ 146
2	COLRUYT GROUP	67,9	↑ 128
3	AHOLD DELHAIZE	38,7	↑ 160
4	D'IETEREN GROUP	35,0	↑ 168
5	THE COCA-COLA COMPANY	33,8	↑ 358
6	UNILEVER	26,5	↑ 170
7	TELENET GROUP HOLDING	22,0	↑ 133
8	RECKITT & BENCKISER	21,2	↑ 121
9	PROXIMUS GROUP	17,6	↑ 123
10	L'OREAL GROUP	17,5	↑ 202
11	PSA GROUPE	16,9	↓ 96
12	NESTLE GROUP	16,6	↑ 172
13	RENAULT-NISSAN ALLIANCE	16,4	↑ 115
14	LOTERIE NATIONALE	16,3	↑ 153
15	AS WATSON	14,1	↑ 147

Rank	ADV.GROUP	Gross Inv.	vs 2020
16	ORANGE	14,1	↑ 105
17	BMW GROUP BELGIUM	14,1	↑ 145
18	NETHYS	13,9	↑ 123
19	CARREFOUR GROUP	13,2	↑ 118
20	VINTED	13,1	↑ 129
21	LIDL & CO	12,7	↑ 129
22	FERRERO	12,7	↑ 153
23	ALDI	12,2	↓ 77
24	MONDELEZ INTERNATIONAL	12,1	↑ 173
25	HELLOFRESH	11,7	↑ 206
26	COOLBLUE	10,8	↑ 258
27	HENKEL	10,7	↑ 124
28	BEIERSDORF	10,6	↑ 109
29	GROUPE 3 SUISES	10,3	↑ 102
30	PEPSICO	9,3	↓ 98





# Key TV figures

# Key TV figures North - Jul-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Jul-21	YTD-21	Jul-21	YTD-21	Jul-21	YTD-21
VTM	PRP 18-54	3,5	5,9	19,6	24,2	21,9	206,2
VTM2	PRP 18-54	1,0	1,4	5,5	5,8	6,5	50,5
VTM3	PRP 18-54	0,7	0,9	3,9	3,6	4,1	33,1
VTM4	MEN 18-54	0,5	0,5	2,9	2,6	2,8	20,2
Play4	PRP 18-54	1,0	2,8	5,4	11,5	7,4	98,3
Play5	PRP 18-54	0,6	1,0	3,6	4,2	3,0	39,5
Play6	PRP 18-54	0,6	0,6	3,1	2,4	2,7	21,4
Total TV	PRP 18-54	17,6	24,5				
Total TV	MEN 18-54	15,7	20,3				

# Key TV indexes North - Jul-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	
		Jul-21	YTD-21	Jul-21	YTD-21	Jul-21	YTD-21
VTM	PRP 18-54	↓ 72	↓ 86	↓ 83	↓ 96	↑ 116	↑ 132
VTM2	PRP 18-54	↓ 71	↓ 83	↓ 80	↓ 92	↑ 162	↑ 156
VTM3	PRP 18-54	↓ 65	↓ 72	↓ 74	↓ 80	↑ 185	↑ 165
VTM4	MEN 18-54	↓ 82	↓ 96	↓ 84	↑ 108	↑ 300	↑ 182
Play4	PRP 18-54	↓ 55	↓ 93	↓ 63	↑ 104	↑ 121	↑ 135
Play5	PRP 18-54	↓ 73	↓ 66	↓ 83	↓ 73	↓ 83	↑ 119
Play6	PRP 18-54	↓ 93	↓ 95	↑ 107	↑ 106	↑ 164	↑ 161
Total TV	PRP 18-54	↓ 88	↓ 90				
Total TV	MEN 18-54	↓ 96	↓ 90				

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-Jul - 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
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	28,2%	27,9%	30,6%	<b>29,2%</b>	96
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	83,5%	81,6%	79,2%	<b>73,4%</b>	93
	VHS + DVD player + Blu-Ray	"	3,6%	2,5%	2,4%	<b>1,8%</b>	72
	Video on demand + Digital recorder	"	11,4%	14,3%	16,9%	<b>23,6%</b>	139
	Game console and other devices (3)	"	1,5%	1,6%	1,5%	<b>1,1%</b>	76
<b>% Time shift viewing (4)</b>	All Channels	"	24,7%	29,2%	32,5%	<b>32,6%</b>	100
	Main Channels (5)	"	29,5%	33,1%	36,1%	<b>37,7%</b>	104
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	86	86	86	<b>80</b>	
	Main channels (5) - TSV	"	34	35	37	<b>35</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	105	96	99	<b>84</b>	85
	All TV channels (TSV)	"	29	32	37	<b>34</b>	91
	All TV channels (Live + TSV)	"	134	127	136	<b>118</b>	87
	Other TV Screen Usage	"	35	37	47	<b>55</b>	117
	Total TV Screen Usage	"	169	165	183	<b>172</b>	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 - Jul-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Jul-21	YTD-21	Jul-21	YTD-21	Jul-21	YTD-21
RTL-TVI	PRP 18-54	4,7	5,6	24,8	24,8	14,7	141,3
Club-RTL	MEN 18-54	0,8	1,0	5,0	5,6	1,8	20,6
Plug-RTL	ALL 15-34	0,4	0,5	3,8	4,4	1,3	11,7
TF1	PRP 18-54	2,0	2,8	10,7	12,1	4,0	31,5
La Une	PRP 18-54	3,4	4,0	17,9	17,7	5,9	60,3
Tipik	PRP 18-54	1,8	1,7	9,3	7,3	3,0	22,9
AB3	PRP 18-44	1,0	1,2	6,4	6,6	1,5	14,4
TTV	PRP 18-54	18,9	22,8				
TTV	PRP 18-44	15,8	18,6				
TTV	ALL 15-34	10,4	12,2				
TTV	MEN 18-54	15,3	17,7				

# Key TV indexes South - Jul-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	
		Jul-21	YTD-21	Jul-21	YTD-21	Jul-21	YTD-21
RTL-TV1	PRP 18-54	↓ 91	↓ 79	↓ 97	↓ 91	↑ 113	↑ 138
Club-RTL	MEN 18-54	↓ 94	↓ 97	↓ 87	↑ 105	↓ 95	↑ 115
Plug-RTL	ALL 15-34	↓ 75	↓ 83	↓ 77	↔ 101	↑ 154	↑ 161
TF1	PRP 18-54	↓ 76	↓ 81	↓ 81	↓ 94	↑ 179	↑ 207
La Une	PRP 18-54	↑ 124	↔ 100	↑ 132	↑ 116	↑ 145	↑ 149
Tipik	PRP 18-54	↑ 161	↑ 119	↑ 170	↑ 138	↑ 236	↑ 185
AB3	PRP 18-44	↓ 78	↓ 75	↓ 82	↓ 90	↑ 117	↓ 88
TTV	PRP 18-54	↓ 94	↓ 87				
TTV	PRP 18-44	↓ 95	↓ 83				
TTV	ALL 15-34	↓ 97	↓ 82				
TTV	MEN 18-54	↑ 108	↓ 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-Jul - 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
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	31,7%	31,2%	34,0%	<b>31,4%</b>	92
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	75,8%	73,5%	67,2%	<b>64,3%</b>	96
	VHS + DVD player + Blu-Ray	"	6,6%	4,8%	4,0%	<b>2,9%</b>	74
	Video on demand + Digital recorder	"	16,9%	20,6%	27,5%	<b>32,1%</b>	116
	Game console and other devices (3)	"	0,8%	1,1%	1,3%	<b>0,6%</b>	49
<b>% Time shift viewing (4)</b>	All Channels	"	19,9%	21,3%	24,2%	<b>26,6%</b>	110
	Main Channels (5)	"	20,5%	21,6%	24,8%	<b>27,1%</b>	109
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	83	88	89	<b>86</b>	
	Main channels (5) - TSV	"	50	51	50	<b>56</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	130	126	119	<b>101</b>	84
	All TV channels (TSV)	"	26	27	31	<b>29</b>	96
	All TV channels (Live + TSV)	"	156	153	150	<b>130</b>	87
	Other TV Screen Usage	"	59	64	86	<b>84</b>	97
	Total TV Screen Usage	"	214	217	236	<b>214</b>	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 - Jul-21

Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	2.963.856	11	2dehands.be/2ememain.be	1.521.324
2	Nieuwsblad	2.882.628	12	Immoweb	1.432.032
3	RTBF.be	2.352.000	13	La Libre.be	1.408.008
4	VRT	2.163.000	14	Gazet van Antwerpen	1.320.144
5	Sudinfo	2.115.036	15	De Standaard	1.318.548
6	RTL.be	1.918.812	16	Knack/Le Vif	1.251.348
7	Le Soir	1.823.976	17	Buienradar	1.172.472
8	DH.be	1.786.428	18	De Morgen	1.150.380
9	Sporza	1.738.380	19	7sur7.be	1.070.160
10	L'Avenir.net	1.608.096	20	Het Belang van Limburg	981.120

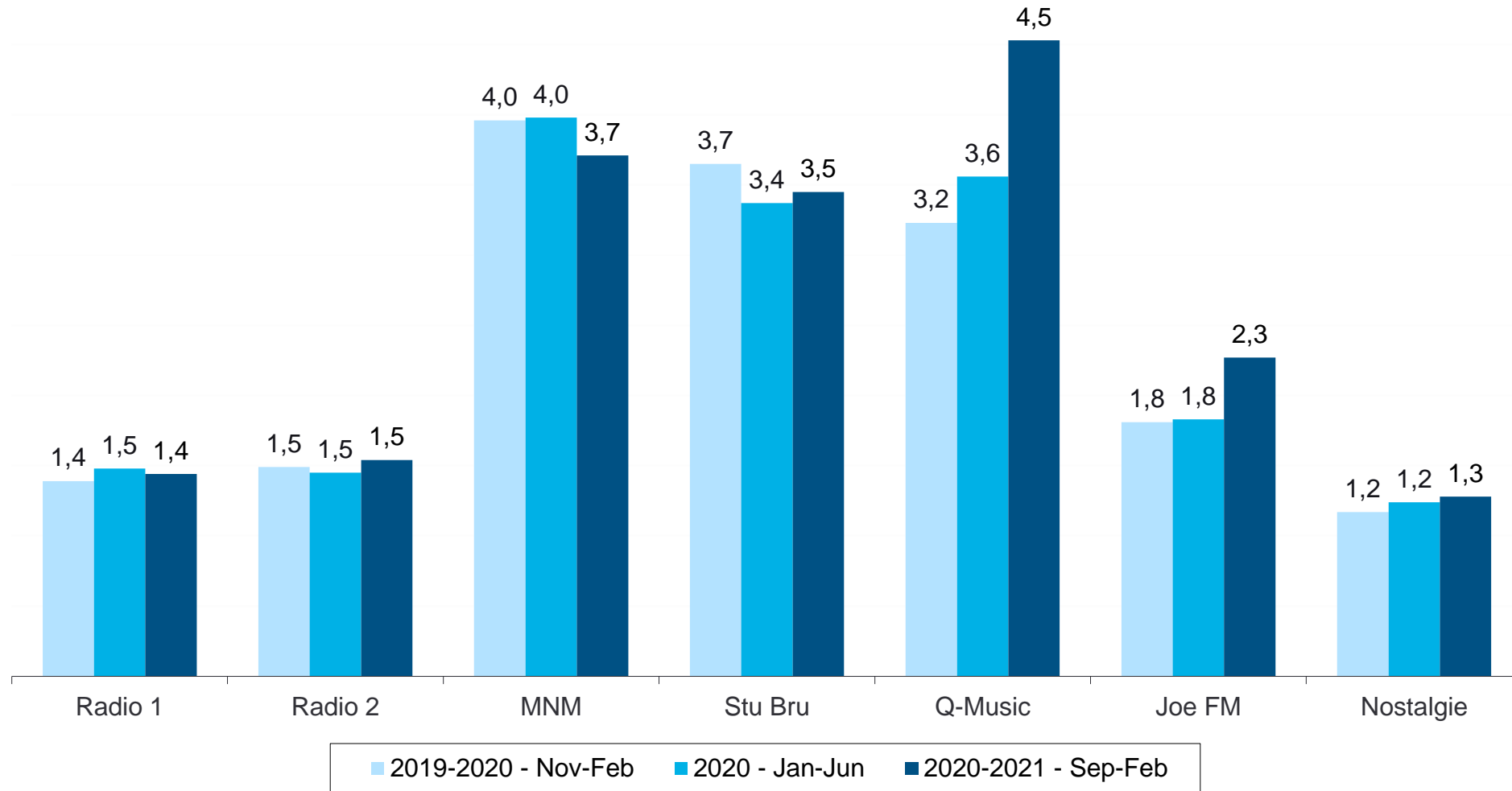




# Key Radio figures

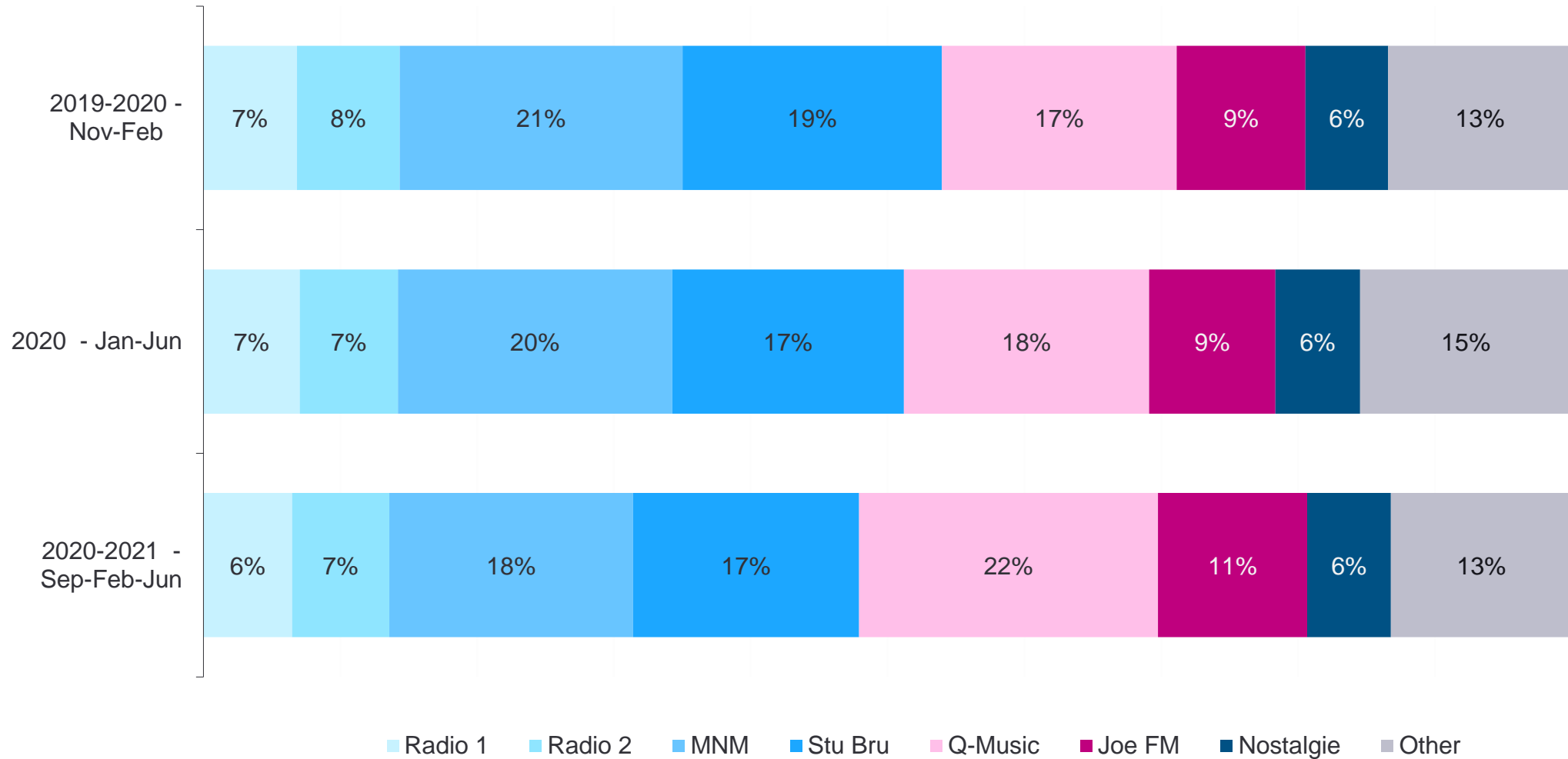
# KEY RADIO FIGURES NORTH

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



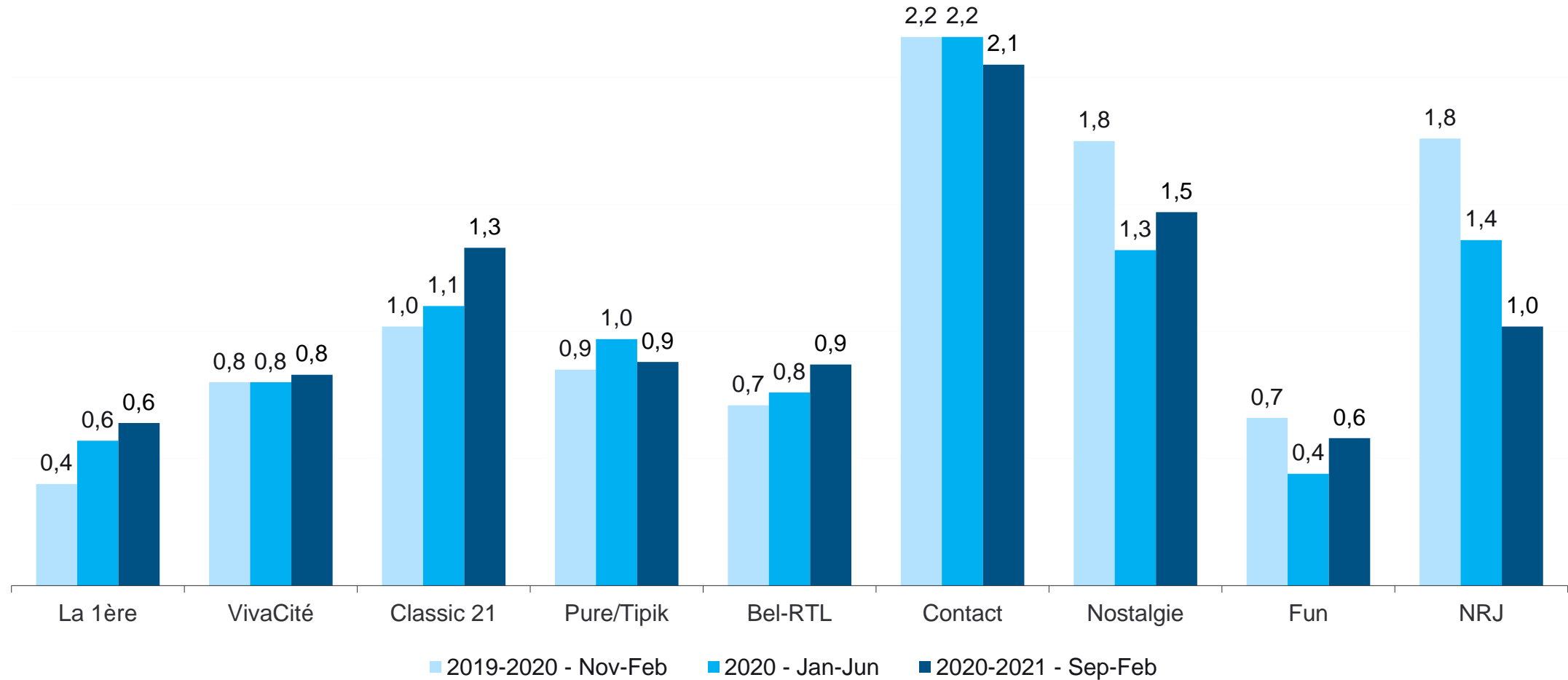
# KEY RADIO FIGURES NORTH

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



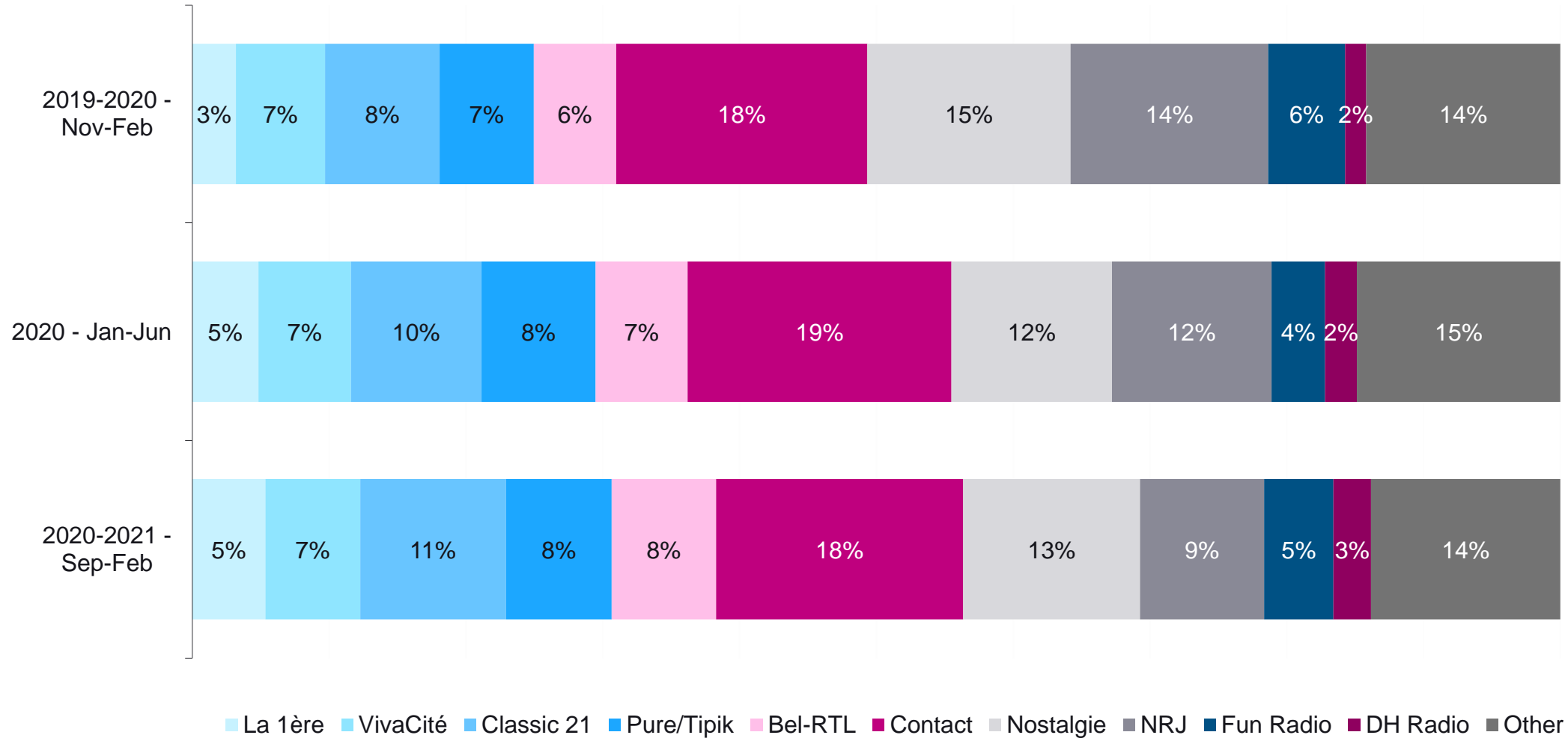
# KEY RADIO FIGURES SOUTH

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
<b>Total North</b>	<b>799.462</b>	<b>↓ 98</b>	<b>20%</b>	<b>↑ 119</b>

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
<b>Total South</b>	<b>310.028</b>	<b>→ 100</b>	<b>30%</b>	<b>↑ 138</b>

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

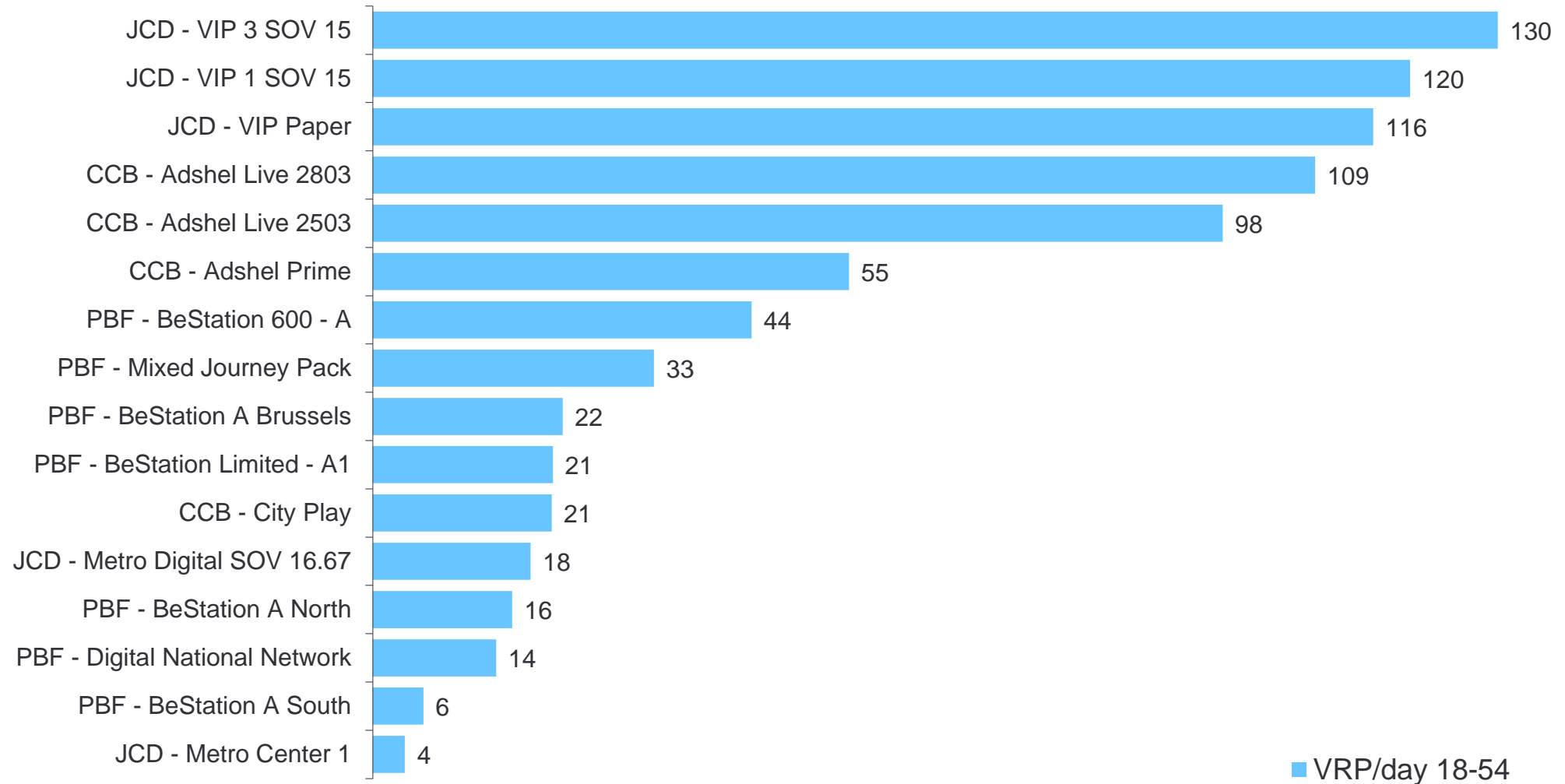
Categories	NL-speaking		FR-speaking		Both languages		TOTAL	
	Circulation	vs 2019	Circulation	vs 2019	Circulation	vs 2019	Circulation	vs 2019
Television	572.494	↓ 96	345.684	↓ 93			918.178	↓ 95
Lifestyle Culture & Travel	110.940	↑ 104	68.286	↑ 102	354.928	↑ 107	534.154	↑ 105
Women	307.494	↓ 96	131.623	↓ 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
<b>TOTAL</b>	<b>1.160.405</b>	<b>↓ 96</b>	<b>720.580</b>	<b>↓ 93</b>	<b>569.995</b>	<b>↑ 101</b>	<b>2.450.980</b>	<b>↓ 96</b>



# 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

