



space

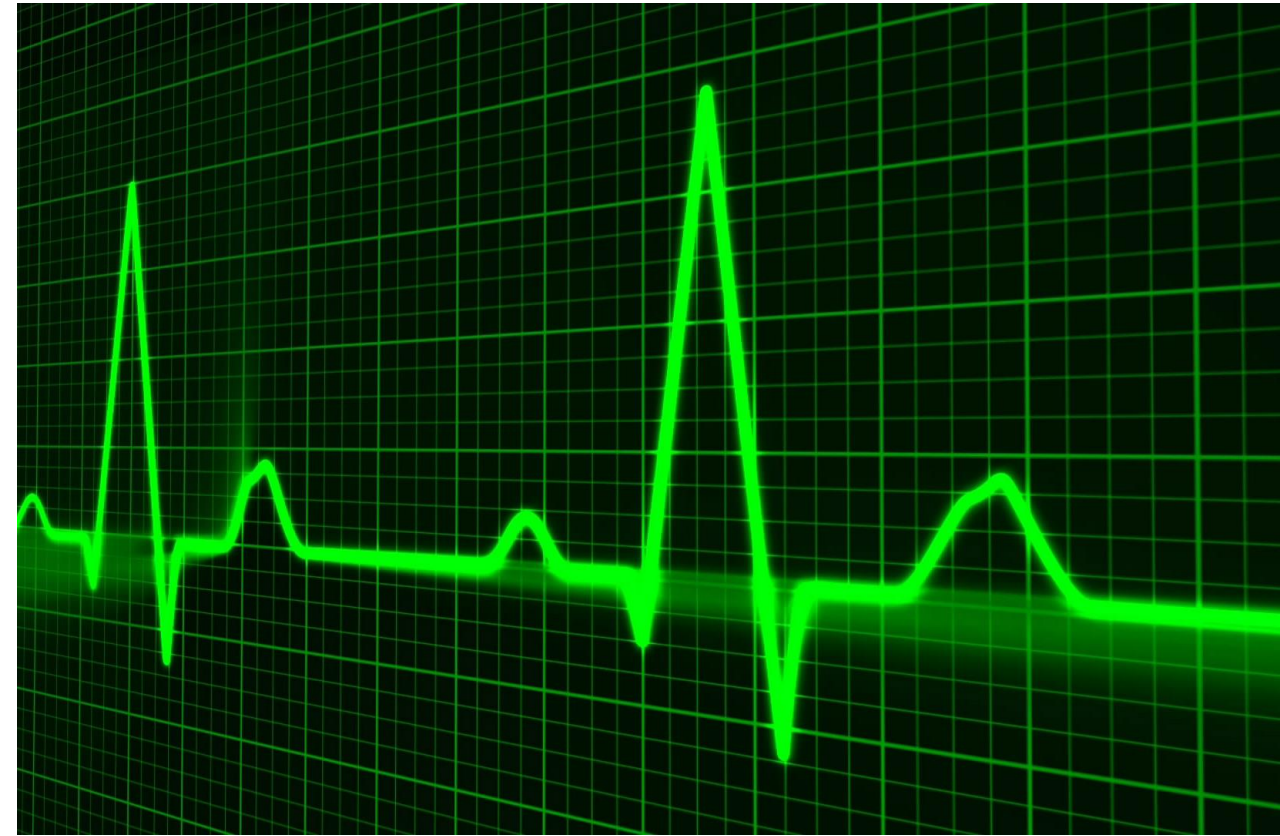
CONNECTIONS AGENCY



intelligence  
Market & Business

# MARKET PERFORMANCES BAROMETER

April 2022



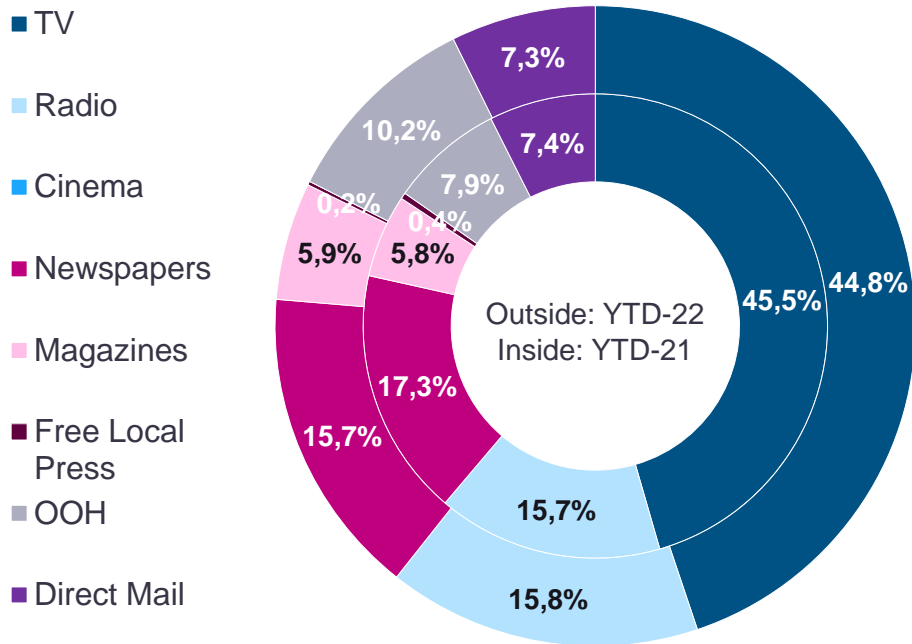
# Gross Media Investments Evolution

# GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Mar 2022

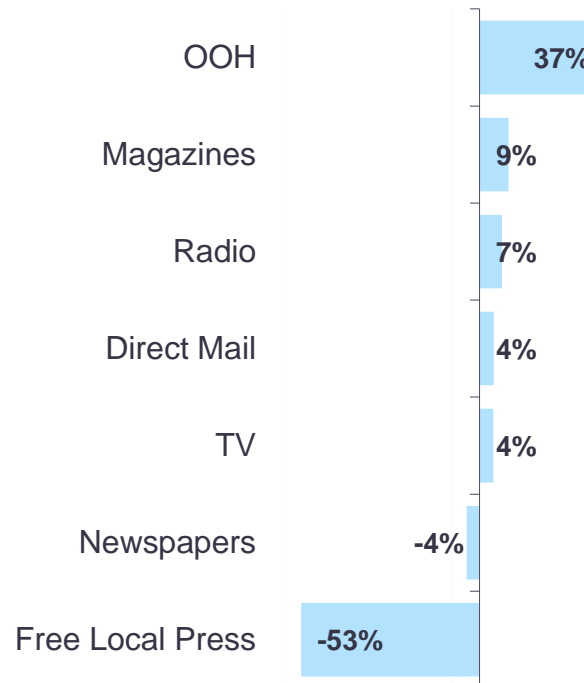
NB : No Internet figures in MDB universe / Cinema figures are missing for Q1 2022

Market	National	North	South
<ul style="list-style-type: none"> <li>▪ € Mo</li> <li>▪ vs YTD-21</li> <li>▪ % Region</li> </ul>	847,5 + 5,9% 100%	517,4 + 7,5% 61%	330,1 + 3,4% 39%

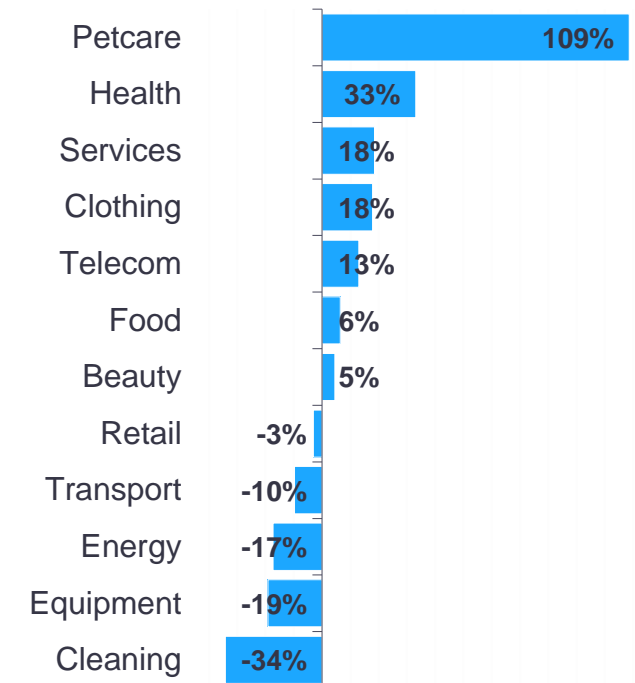
**Media Mix Evol.**



**Media Evol. (vs YTD-21)**



**EcoGroups Evol. (vs YTD-21)**



# MDB TOP 30 ADVERTISERS - Jan-Mar 2022

NB : No Internet figures in MDB universe / Cinema figures are missing for Q1 2022

Rank	ADV.GROUP	Gross Inv.	vs 2021
1	COLRUYT GROUP	29,9	↓ 85
2	PROCTER & GAMBLE BENELUX	23,5	↓ 82
3	D'IETEREN GROUP	17,1	↓ 81
4	AHOLD DELHAIZE	16,3	↓ 98
5	STELLANTIS *	13,0	↓ 81
6	THE COCA-COLA COMPANY	11,5	↓ 90
7	ORANGE	10,8	↑ 227
8	TELENET GROUP HOLDING	9,6	↓ 93
9	UNILEVER	8,9	↑ 122
10	CARREFOUR GROUP	8,8	↑ 162
11	PROXIMUS GROUP	8,5	↓ 81
12	RECKITT & BENCKISER	8,5	↓ 90
13	BMW GROUP BELGIUM	8,2	↑ 103
14	RENAULT-NISSAN ALLIANCE	7,7	↓ 69
15	ALDI	7,7	↑ 171

Rank	ADV.GROUP	Gross Inv.	vs 2021
16	LOTERIE NATIONALE	7,3	↔ 101
17	AS WATSON	6,9	↑ 111
18	FERRERO	6,8	↑ 110
19	L'OREAL GROUP	6,5	↑ 112
20	THE WALT DISNEY COMPANY	6,4	↑ 138
21	3I GROUP	5,9	↑ 452
22	NETHYS	5,8	↓ 85
23	HELLOFRESH	5,6	↑ 117
24	MONDELEZ INTERNATIONAL	5,6	↑ 106
25	GROUPE 3 SUISSES	5,6	↑ 121
26	BELFIUS	5,6	↑ 211
27	GEELY SWEDEN AB	4,5	↑ 158
28	TOYOTA BELGIUM	4,4	↑ 144
29	PERRIGO	4,4	↑ 160
30	NESTLE GROUP	4,4	↓ 76

\* : PSA + FCA



# Key TV figures

# Key TV figures North - Apr-22

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Apr-22	YTD-22	Apr-22	YTD-22	Apr-22	YTD-22
VTM	PRP 18-54	6,6	7,4	28,1	28,4	29,7	99,2
VTM2	PRP 18-54	1,4	1,6	6,1	6,0	8,1	23,9
VTM3	PRP 18-54	0,7	0,8	3,1	3,2	3,2	12,6
VTM4	MEN 18-54	0,5	0,5	2,4	2,4	4,0	12,7
Play4	PRP 18-54	3,5	3,1	14,9	11,7	13,3	51,4
Play5	PRP 18-54	0,9	1,0	3,9	3,8	5,5	17,3
Play6	PRP 18-54	0,4	0,5	1,8	1,8	5,6	19,8
Total TV	PRP 18-54	23,5	26,2				
Total TV	MEN 18-54	18,7	21,0				

# Key TV indexes North - Apr-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	
		Apr-22	YTD-22	Apr-22	YTD-22	Apr-22	YTD-22
VTM	PRP 18-54	↓ 95	↑ 106	↑ 107	↑ 110	↓ 83	↓ 88
VTM2	PRP 18-54	↓ 90	↓ 96	↔ 101	↔ 100	↓ 98	↓ 91
VTM3	PRP 18-54	↓ 89	↓ 82	↔ 101	↓ 84	↓ 66	↓ 85
VTM4	MEN 18-54	↓ 67	↓ 85	↓ 76	↓ 89	↑ 127	↑ 142
Play4	PRP 18-54	↓ 82	↓ 88	↓ 92	↓ 91	↓ 68	↓ 85
Play5	PRP 18-54	↓ 80	↓ 80	↓ 91	↓ 83	↓ 70	↓ 71
Play6	PRP 18-54	↓ 71	↓ 76	↓ 80	↓ 79	↑ 176	↑ 188
Total TV	PRP 18-54	↓ 89	↓ 97				
Total TV	MEN 18-54	↓ 89	↓ 96				

# Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Apr - 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
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	30,1%	33,8%	32,0%	<b>30,5%</b>	95
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	82,4%	80,4%	74,0%	<b>73,8%</b>	100
	Video on demand + Digital recorder	"	13,6%	16,0%	22,4%	<b>25,6%</b>	114
<b>% Time shift viewing (4)</b>	All Channels	"	30,6%	32,9%	34,2%	<b>38,3%</b>	112
	Main Channels (5)	"	34,3%	37,0%	38,6%	<b>43,4%</b>	113
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	88	86	82	<b>83</b>	
	Main channels (5) - TSV	"	35	35	36	<b>39</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	101	109	88	<b>82</b>	93
	All TV channels (TSV)	"	35	42	38	<b>39</b>	103
	All TV channels (Live + TSV)	"	136	151	126	<b>121</b>	96
	Other TV Screen Usage	"	38	48	57	<b>55</b>	96
	Total TV Screen Usage	"	175	199	184	<b>176</b>	96



## Key TV figures South - Apr-22

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Apr-22	YTD-22	Apr-22	YTD-22	Apr-22	YTD-22
RTL-TV1	PRP 18-54	5,0	5,6	24,9	25,7	20,7	69,9
Club-RTL	MEN 18-54	1,0	1,0	6,6	6,2	3,2	10,9
Plug-RTL	ALL 15-34	0,5	0,5	4,7	4,9	1,8	6,9
TF1	PRP 18-54	2,7	2,6	13,3	12,1	5,1	20,2
La Une	PRP 18-54	2,6	3,3	13,1	15,0	9,6	34,1
Tipik	PRP 18-54	1,0	1,0	5,0	4,7	2,2	8,6
AB3	PRP 18-44	0,9	1,0	5,5	5,5	2,5	8,9
TTV	PRP 18-54	20,0	21,8				
TTV	PRP 18-44	16,8	18,0				
TTV	ALL 15-34	10,1	10,8				
TTV	MEN 18-54	15,0	16,2				

# Key TV indexes South - Apr-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	
		Apr-22	YTD-22	Apr-22	YTD-22	Apr-22	YTD-22
RTL-TV1	PRP 18-54	↓ 85	↓ 89	↓ 96	↓ 98	↓ 97	↓ 86
Club-RTL	MEN 18-54	↓ 72	↓ 88	↓ 81	↔ 101	↓ 84	↓ 90
Plug-RTL	ALL 15-34	↓ 71	↓ 81	↓ 89	↓ 97	↓ 98	↑ 109
TF1	PRP 18-54	↓ 85	↓ 85	↓ 97	↓ 95	↑ 121	↑ 122
La Une	PRP 18-54	↓ 76	↓ 80	↓ 86	↓ 89	↑ 108	↑ 106
Tipik	PRP 18-54	↑ 102	↓ 84	↑ 115	↓ 94	↓ 87	↔ 100
AB3	PRP 18-44	↓ 64	↓ 80	↓ 71	↓ 85	↑ 124	↑ 113
TTV	PRP 18-54	↓ 88	↓ 90				
TTV	PRP 18-44	↓ 90	↓ 94				
TTV	ALL 15-34	↓ 81	↓ 85				
TTV	MEN 18-54	↓ 88	↓ 87				

# Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Apr - 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
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	33,2%	36,5%	33,4%	<b>31,3%</b>	94
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	74,2%	68,3%	64,4%	<b>61,6%</b>	96
	Video on demand + Digital recorder	"	19,5%	26,8%	31,4%	<b>38,0%</b>	121
<b>% Time shift viewing (4)</b>	All Channels	"	22,0%	24,0%	27,9%	<b>25,9%</b>	93
	Main Channels (5)	"	22,5%	24,5%	28,9%	<b>27,8%</b>	96
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	88	87	89	<b>89</b>	
	Main channels (5) - TSV	"	52	50	54	<b>51</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	132	128	104	<b>98</b>	94
	All TV channels (TSV)	"	30	33	32	<b>27</b>	86
	All TV channels (Live + TSV)	"	162	162	136	<b>126</b>	92
	Other TV Screen Usage	"	66	89	88	<b>92</b>	105
	Total TV Screen Usage	"	228	250	224	<b>218</b>	97



# Top websites

# Key Digital Figures - TOP BELGIAN WEBSITES - Apr-22

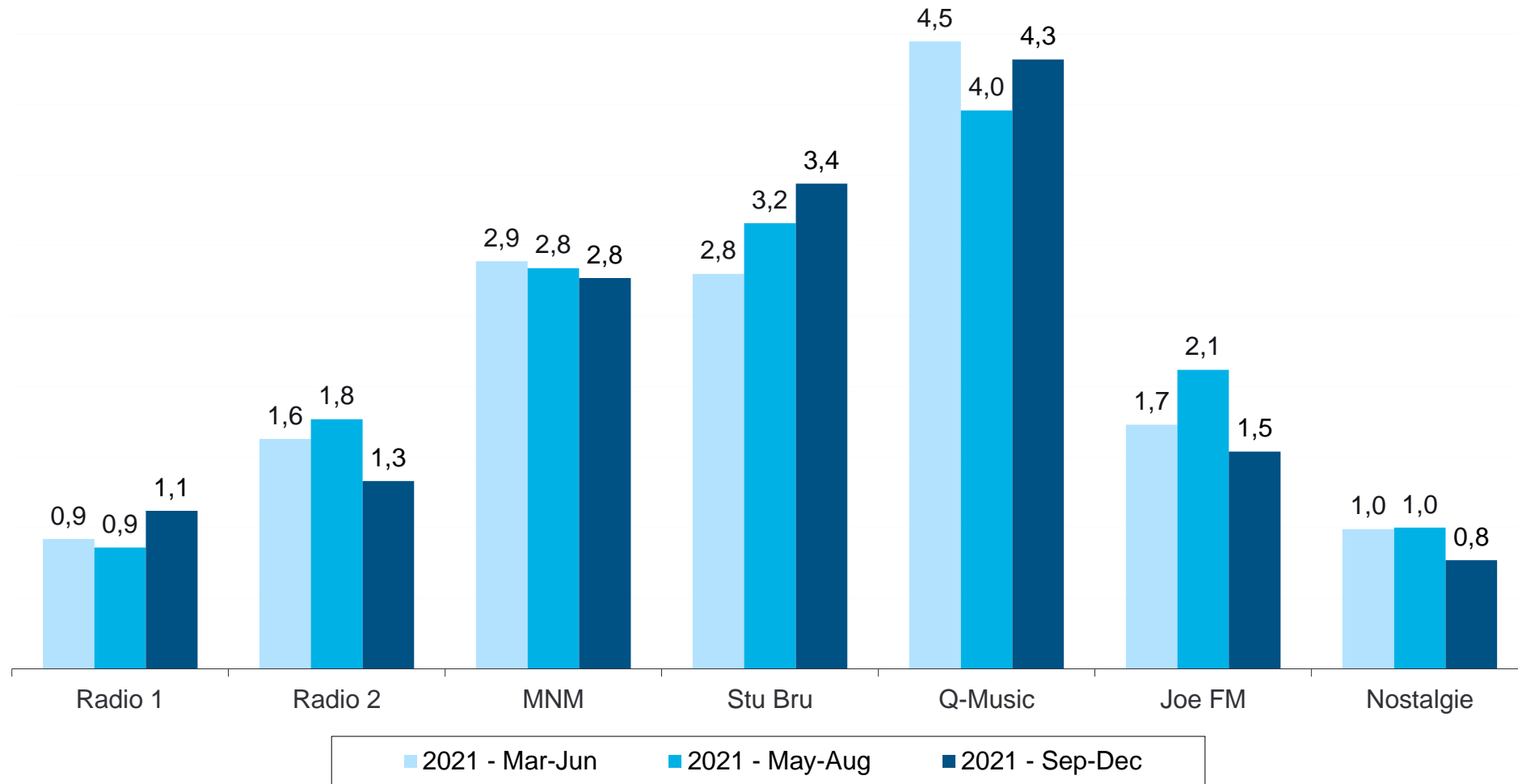
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	2.819.124	11	Gazet van Antwerpen	1.331.988
2	Nieuwsblad	2.446.752	12	L'Avenir.net	1.189.776
3	SudInfo	2.113.188	13	Metrotime	1.094.940
4	VRT	1.825.404	14	Sporza	1.087.380
5	Le Soir	1.716.540	15	Knack/Le Vif	1.064.196
6	Immoweb	1.638.168	16	De Morgen	1.059.072
7	RTL.be	1.637.748	17	La Libre.be	1.037.736
8	DH.be	1.634.472	18	Flair	1.028.748
9	2dehands.be/2ememain.be	1.587.264	19	7sur7.be	976.668
10	RTBF.be	1.569.456	20	De Standaard	890.148



# Key Radio figures

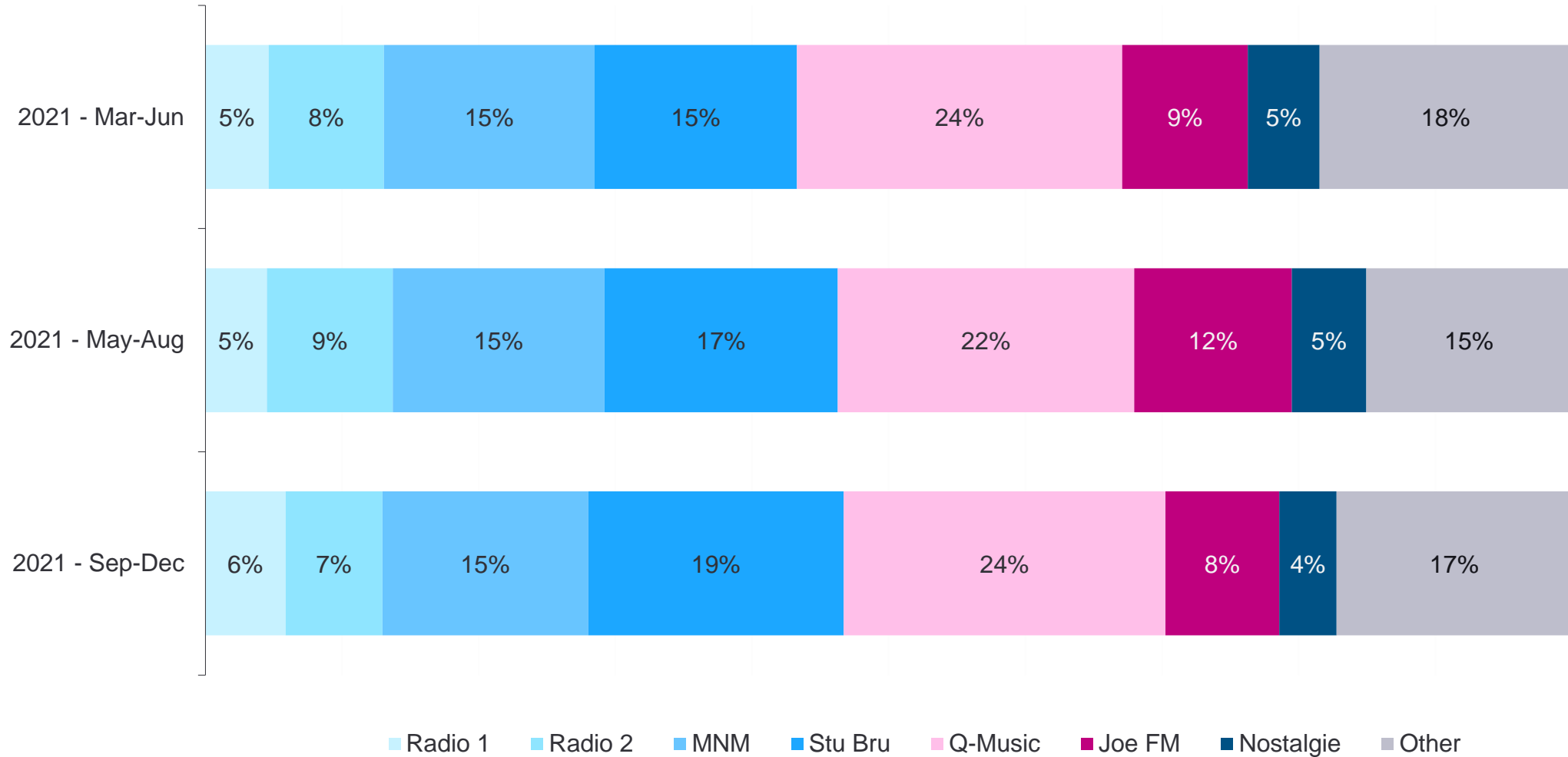
# KEY RADIO FIGURES NORTH

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



# KEY RADIO FIGURES NORTH

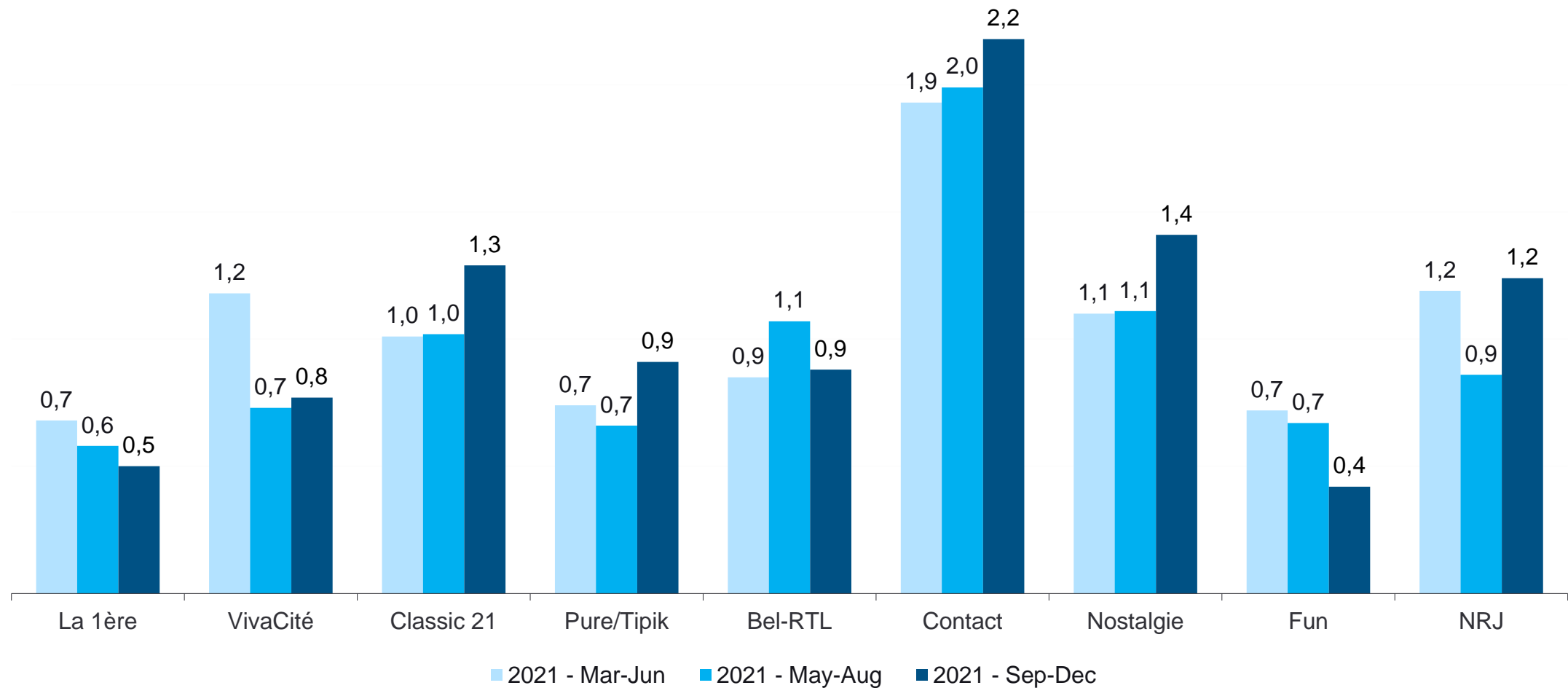
## Audience Shares (%) on ALL 18-44 - 07:00-19:00





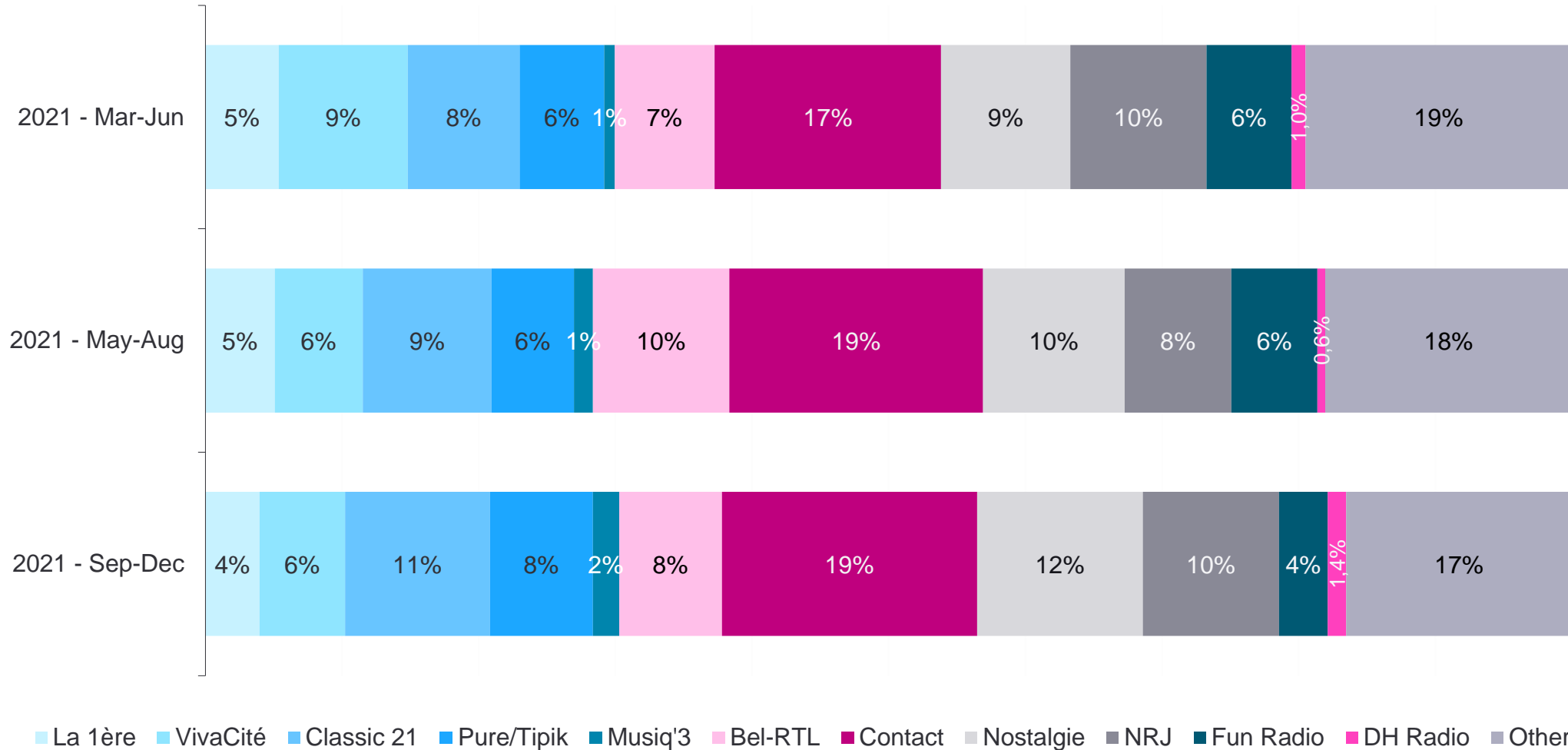
# KEY RADIO FIGURES SOUTH

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	226.075	↓ 98	18%	↑ 127
De Morgen	48.292	↑ 104	48%	↑ 109
Het Nieuwsblad/De Gentenaar	n.a.	n.a.	n.a.	n.a.
De Standaard	n.a.	n.a.	n.a.	n.a.
Het Belang van Limburg	n.a.	n.a.	n.a.	n.a.
Gazet van Antwerpen	n.a.	n.a.	n.a.	n.a.
De Tijd	n.a.	n.a.	n.a.	n.a.
<b>Total North</b>	<b>274.367</b>	<b>↓ 99</b>	<b>23%</b>	<b>↑ 121</b>

SOUTH	Circulation	vs 2020	Digital Part	vs 2020
Le Soir	75.536	↑ 102	61%	↑ 111
L'Avenir	65.733	↓ 95	10%	↑ 110
Sud Presse	64.389	↓ 93	21%	↑ 102
La Libre Belgique	40.651	→ 100	42%	↑ 111
La DH	29.777	↓ 93	23%	↑ 112
Grenz Echo	8.057	↓ 96	17%	↑ 132
L'Echo	n.a.	n.a.	n.a.	n.a.
<b>Total South</b>	<b>284.143</b>	<b>↓ 97</b>	<b>32%</b>	<b>↑ 112</b>

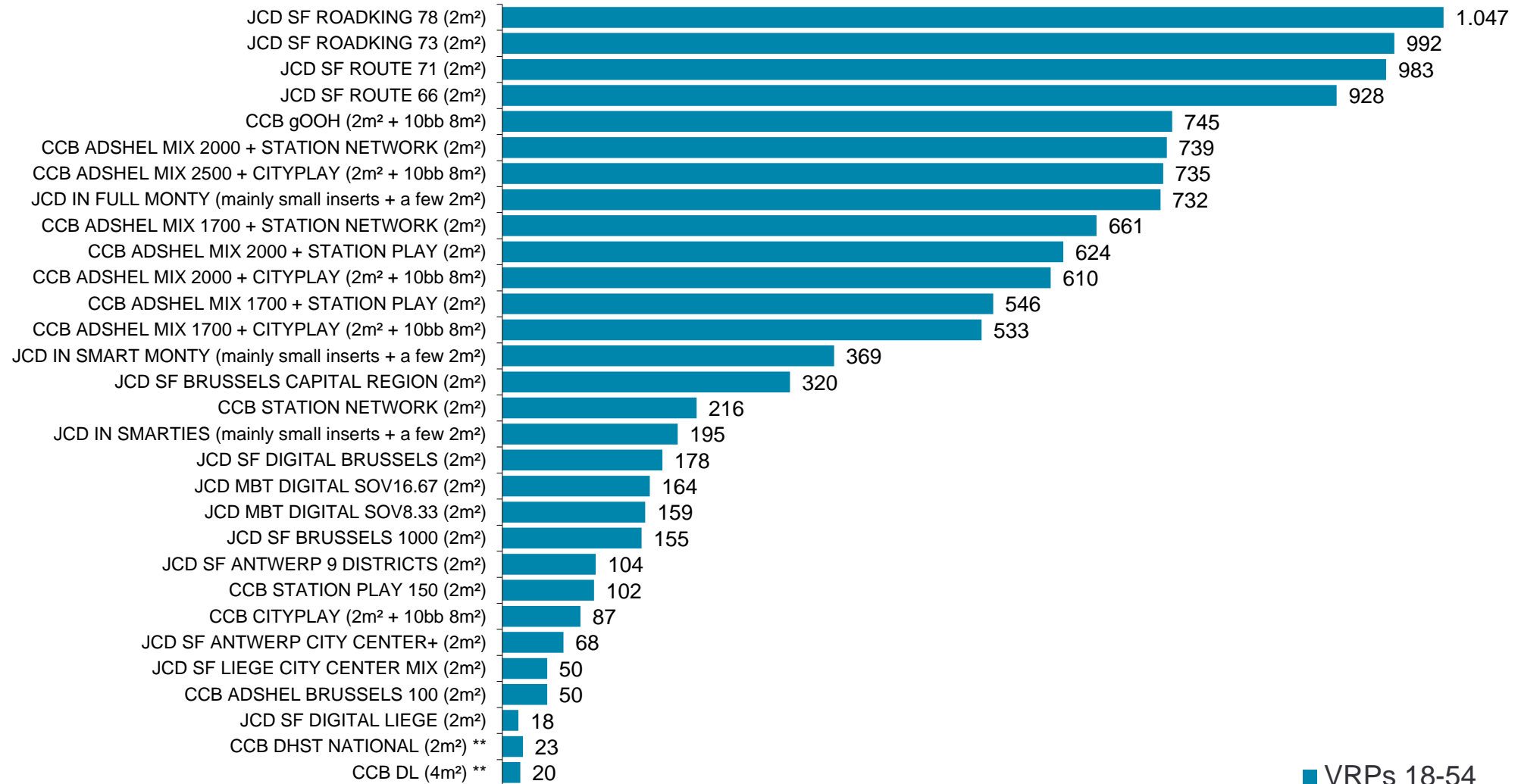
# Key Print Figures - Magazines Circulation - Year 2021 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages		TOTAL	
	Circulation	vs 2020	Circulation	vs 2020	Circulation	vs 2020	Circulation	vs 2020
Television	539.675	↓ 94	327.834	↓ 95			867.509	↓ 94
Women	291.336	↓ 94	121.953	↓ 92			413.289	↓ 94
Lifestyle Culture & Travel	115.332	↑ 101	65.710	↓ 96	188.696	↑ 102	369.738	↑ 101
Business & News	97.682	↓ 95	125.950	↓ 98	44.714	↑ 103	268.346	↓ 98
Generation (Youth/Senior)			12.826	↓ 95	116.634	↑ 102	129.460	↑ 101
Men	21.458	↓ 92	11.159	↓ 94	32.264	↑ 105	64.881	↓ 99
Build & Deco	36.700	↓ 82	16.690	↓ 77	10.301	↑ 102	63.691	↓ 84
<b>TOTAL</b>	<b>1.102.183</b>	<b>↓ 95</b>	<b>682.122</b>	<b>↓ 94</b>	<b>392.609</b>	<b>↑ 102</b>	<b>2.176.914</b>	<b>↓ 96</b>



# 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

