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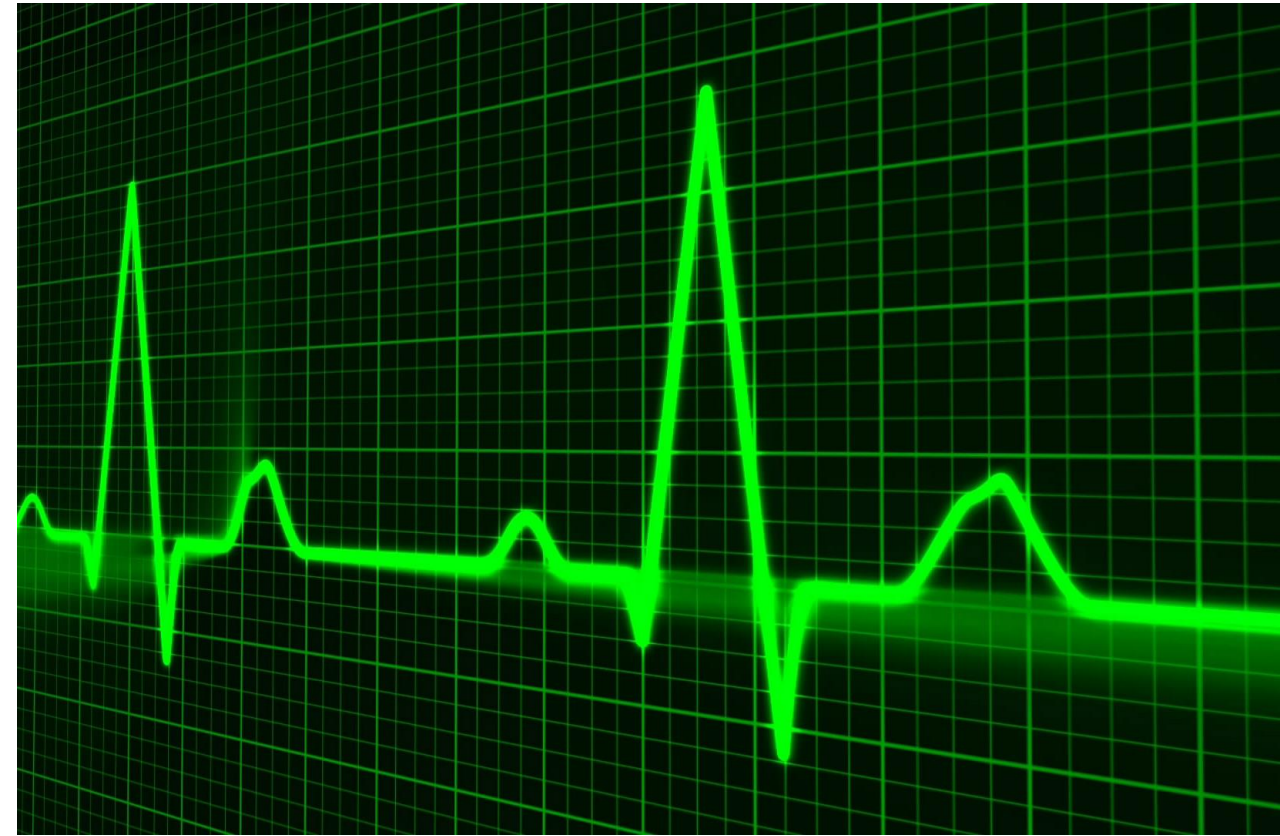
CONNECTIONS AGENCY



intelligence  
Market & Business

# MARKET PERFORMANCES BAROMETER

October 2021



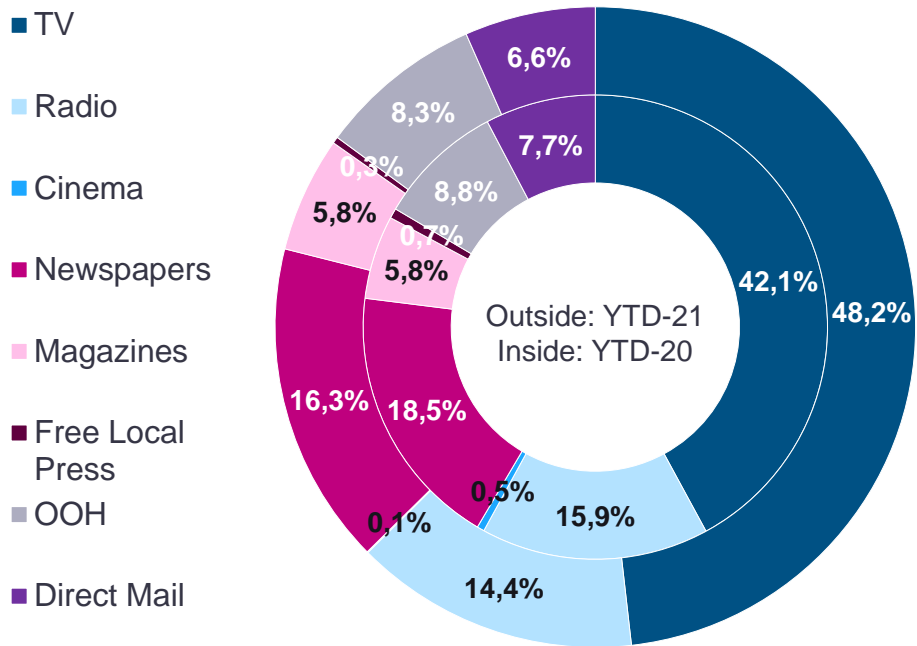
# Gross Media Investments Evolution

# GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Sep 2021

NB : No Internet figures in MDB for 2020 & 2021 / Cinema figures are missing in September 2021

Market	National	North	South
<ul style="list-style-type: none"> <li>■ € Mo</li> <li>■ vs YTD-20</li> <li>■ % Region</li> </ul>	2.649,6 + 21,3% 100%	1.607,8 + 21,7% 61%	1.041,8 + 20,8% 39%

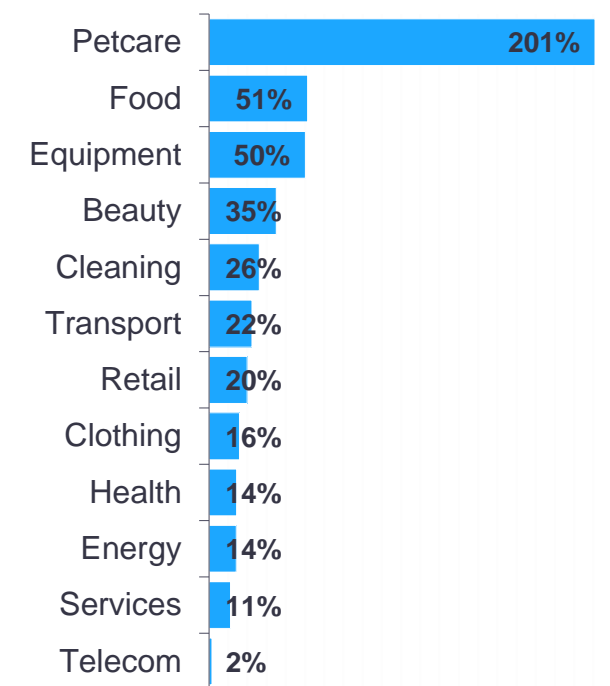
**Media Mix Evol.**



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



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



# MDB TOP 30 ADVERTISERS - Jan-Sep 2021

NB : No Internet figures in MDB for 2020 & 2021 / Cinema figures are missing in September 2021

Rank	ADV.GROUP	Gross Inv.	vs 2020
1	COLRUYT GROUP	105,9	↑ 114
2	PROCTER & GAMBLE	105,6	↑ 138
3	AHOLD DELHAIZE	62,0	↑ 148
4	THE COCA-COLA COMPANY	54,0	↑ 186
5	D'IETEREN GROUP	43,8	↑ 175
6	UNILEVER	42,0	↑ 146
7	RECKITT & BENCKISER	35,7	↑ 114
8	TELENET GROUP HOLDING	30,8	↑ 113
9	PROXIMUS GROUP	26,1	↑ 103
10	L'OREAL GROUP	24,2	↑ 169
11	LOTTERIE NATIONALE	23,5	↑ 125
12	RENAULT-NISSAN ALLIANCE	23,1	↑ 118
13	FERRERO	23,0	↑ 146
14	NESTLE GROUP	22,3	↑ 144
15	AS WATSON	21,5	↑ 137

Rank	ADV.GROUP	Gross Inv.	vs 2020
16	ORANGE	21,0	↓ 93
17	BMW GROUP BELGIUM	20,9	↑ 150
18	NETHYS	20,8	↑ 109
19	ALDI	20,7	↓ 84
20	LIDL & CO	20,4	↑ 120
21	CARREFOUR GROUP	19,3	↓ 97
22	PSA GROUPE	18,3	↓ 79
23	BEIERSDORF	18,2	↑ 125
24	VINTED	18,0	↑ 121
25	MONDELEZ INTERNATIONAL	17,1	↑ 133
26	COOLBLUE	16,8	↑ 236
27	GROUPE 3 SUISES	16,1	↑ 110
28	HELLOFRESH	15,9	↑ 176
29	PEPSICO	15,3	↓ 91
30	AXA GROUP	15,1	↑ 176



# Key TV figures

# Key TV figures North - Oct-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Oct-21	YTD-21	Oct-21	YTD-21	Oct-21	YTD-21
VTM	PRP 18-54	6,8	5,9	28,2	24,8	44,1	311,9
VTM2	PRP 18-54	1,5	1,4	6,3	6,0	13,1	80,7
VTM3	PRP 18-54	0,9	0,9	3,7	3,6	4,9	46,6
VTM4	MEN 18-54	0,8	0,6	3,9	2,9	5,0	29,9
Play4	PRP 18-54	3,2	2,7	13,0	11,3	25,0	147,5
Play5	PRP 18-54	1,0	1,0	4,3	4,3	6,7	54,9
Play6	PRP 18-54	0,5	0,6	1,9	2,3	5,6	34,4
Total TV	PRP 18-54	24,3	23,6				
Total TV	MEN 18-54	19,9	19,5				

# Key TV indexes North - Oct-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	
		Oct-21	YTD-21	Oct-21	YTD-21	Oct-21	YTD-21
VTM	PRP 18-54	↓ 76	↓ 83	↓ 95	↓ 95	→ 100	↑ 120
VTM2	PRP 18-54	↓ 76	↓ 81	↓ 95	↓ 93	↑ 155	↑ 149
VTM3	PRP 18-54	↓ 96	↓ 75	↑ 120	↓ 85	↓ 82	↑ 138
VTM4	MEN 18-54	↑ 140	↑ 102	↑ 178	↑ 116	↑ 237	↑ 183
Play4	PRP 18-54	↓ 74	↓ 87	↓ 92	→ 99	↑ 106	↑ 121
Play5	PRP 18-54	↓ 80	↓ 70	→ 101	↓ 80	↓ 97	↑ 109
Play6	PRP 18-54	↓ 94	↓ 93	↑ 117	↑ 106	↑ 114	↑ 141
Total TV	PRP 18-54	↓ 80	↓ 87				
Total TV	MEN 18-54	↓ 80	↓ 87				

# 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-18	YTD-19	YTD-20	YTD-21	21 vs 20
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	27,7%	27,7%	30,2%	<b>28,3%</b>	94
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	83,0%	81,3%	79,1%	<b>73,0%</b>	92
	VHS + DVD player + Blu-Ray	"	3,5%	2,5%	2,3%	<b>1,4%</b>	59
	Video on demand + Digital recorder	"	11,9%	14,5%	17,2%	<b>24,4%</b>	142
	Game console and other devices (3)	"	1,6%	1,7%	1,4%	<b>1,1%</b>	79
<b>% Time shift viewing (4)</b>	All Channels	"	25,6%	29,2%	32,6%	<b>33,7%</b>	103
	Main Channels (5)	"	30,2%	33,3%	36,6%	<b>38,7%</b>	106
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	86	85	84	<b>80</b>	
	Main channels (5) - TSV	"	33	33	37	<b>35</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	101	95	97	<b>80</b>	83
	All TV channels (TSV)	"	29	31	37	<b>33</b>	91
	All TV channels (Live + TSV)	"	130	126	133	<b>114</b>	85
	Other TV Screen Usage	"	35	37	46	<b>53</b>	115
	Total TV Screen Usage	"	166	163	180	<b>167</b>	93



## Key TV figures South - Oct-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Oct-21	YTD-21	Oct-21	YTD-21	Oct-21	YTD-21
RTL-TVI	PRP 18-54	5,7	5,4	25,9	24,7	33,6	221,5
Club-RTL	MEN 18-54	1,0	1,0	6,1	5,9	4,8	32,4
Plug-RTL	ALL 15-34	0,5	0,5	4,2	4,3	2,8	18,5
TF1	PRP 18-54	3,2	2,7	14,6	12,5	8,3	52,7
La Une	PRP 18-54	3,2	3,7	14,5	17,0	12,5	90,3
Tipik	PRP 18-54	1,1	1,5	5,2	6,9	3,4	30,7
AB3	PRP 18-44	1,2	1,2	6,3	6,8	3,9	22,9
TTV	PRP 18-54	22,0	21,9				
TTV	PRP 18-44	18,2	17,9				
TTV	ALL 15-34	11,1	11,6				
TTV	MEN 18-54	16,3	16,9				

# Key TV indexes South - Oct-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	
		Oct-21	YTD-21	Oct-21	YTD-21	Oct-21	YTD-21
RTL-TV1	PRP 18-54	↓ 73	↓ 79	↓ 89	↓ 92	↑ 115	↑ 123
Club-RTL	MEN 18-54	↑ 119	↔ 101	↑ 145	↑ 111	↓ 94	↑ 104
Plug-RTL	ALL 15-34	↓ 73	↓ 79	↓ 95	↓ 97	↑ 137	↑ 145
TF1	PRP 18-54	↓ 91	↓ 83	↑ 111	↓ 97	↑ 122	↑ 170
La Une	PRP 18-54	↓ 73	↓ 96	↓ 89	↑ 111	↑ 110	↑ 133
Tipik	PRP 18-54	↓ 90	↑ 111	↑ 110	↑ 129	↑ 110	↑ 155
AB3	PRP 18-44	↓ 79	↓ 79	↓ 93	↓ 93	↑ 115	↓ 95
TTV	PRP 18-54	↓ 82	↓ 87				
TTV	PRP 18-44	↓ 85	↓ 84				
TTV	ALL 15-34	↓ 77	↓ 82				
TTV	MEN 18-54	↓ 82	↓ 91				

# 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-18	YTD-19	YTD-20	YTD-21	21 vs 20
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	31,0%	30,7%	33,0%	<b>30,3%</b>	92
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	75,2%	71,9%	67,2%	<b>63,7%</b>	95
	VHS + DVD player + Blu-Ray	"	6,4%	4,9%	4,0%	<b>2,3%</b>	57
	Video on demand + Digital recorder	"	17,6%	21,9%	27,6%	<b>33,4%</b>	121
	Game console and other devices (3)	"	0,8%	1,3%	1,2%	<b>0,6%</b>	50
<b>% Time shift viewing (4)</b>	All Channels	"	20,2%	21,7%	24,1%	<b>26,2%</b>	109
	Main Channels (5)	"	20,8%	22,2%	24,4%	<b>26,8%</b>	110
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	83	86	88	<b>86</b>	
	Main channels (5) - TSV	"	51	51	50	<b>55</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	125	121	116	<b>97</b>	84
	All TV channels (TSV)	"	26	27	30	<b>28</b>	94
	All TV channels (Live + TSV)	"	151	148	145	<b>125</b>	86
	Other TV Screen Usage	"	58	66	84	<b>83</b>	99
	Total TV Screen Usage	"	209	214	229	<b>209</b>	91



# Top websites

# Key Digital Figures - TOP BELGIAN WEBSITES - Oct-21

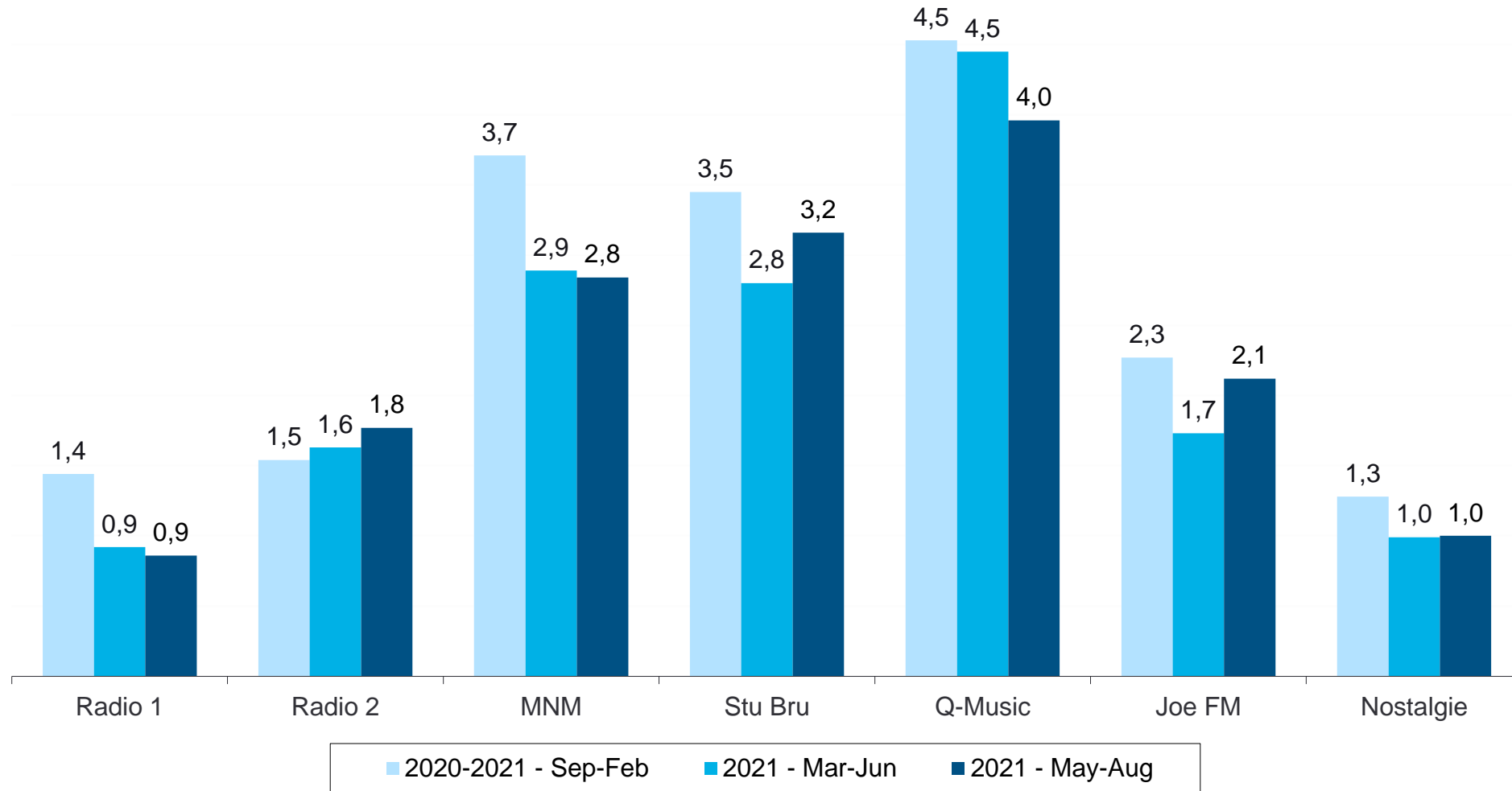
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	2.928.828	11	Gazet van Antwerpen	1.405.068
2	Nieuwsblad	2.747.136	12	De Morgen	1.285.284
3	VRT	2.166.780	13	L'Avenir.net	1.283.352
4	Sudinfo	2.072.196	14	Sporza	1.240.260
5	RTBF.be	1.968.288	15	Knack/Le Vif	1.239.840
6	DH.be	1.934.604	16	De Standaard	1.213.212
7	RTL.be	1.639.176	17	La Libre.be	1.212.204
8	2dehands.be/2ememain.be	1.632.036	18	Flair	1.118.628
9	Le Soir	1.598.436	19	Een	946.932
10	Immoweb	1.506.708	20	7sur7.be	930.468



# Key Radio figures

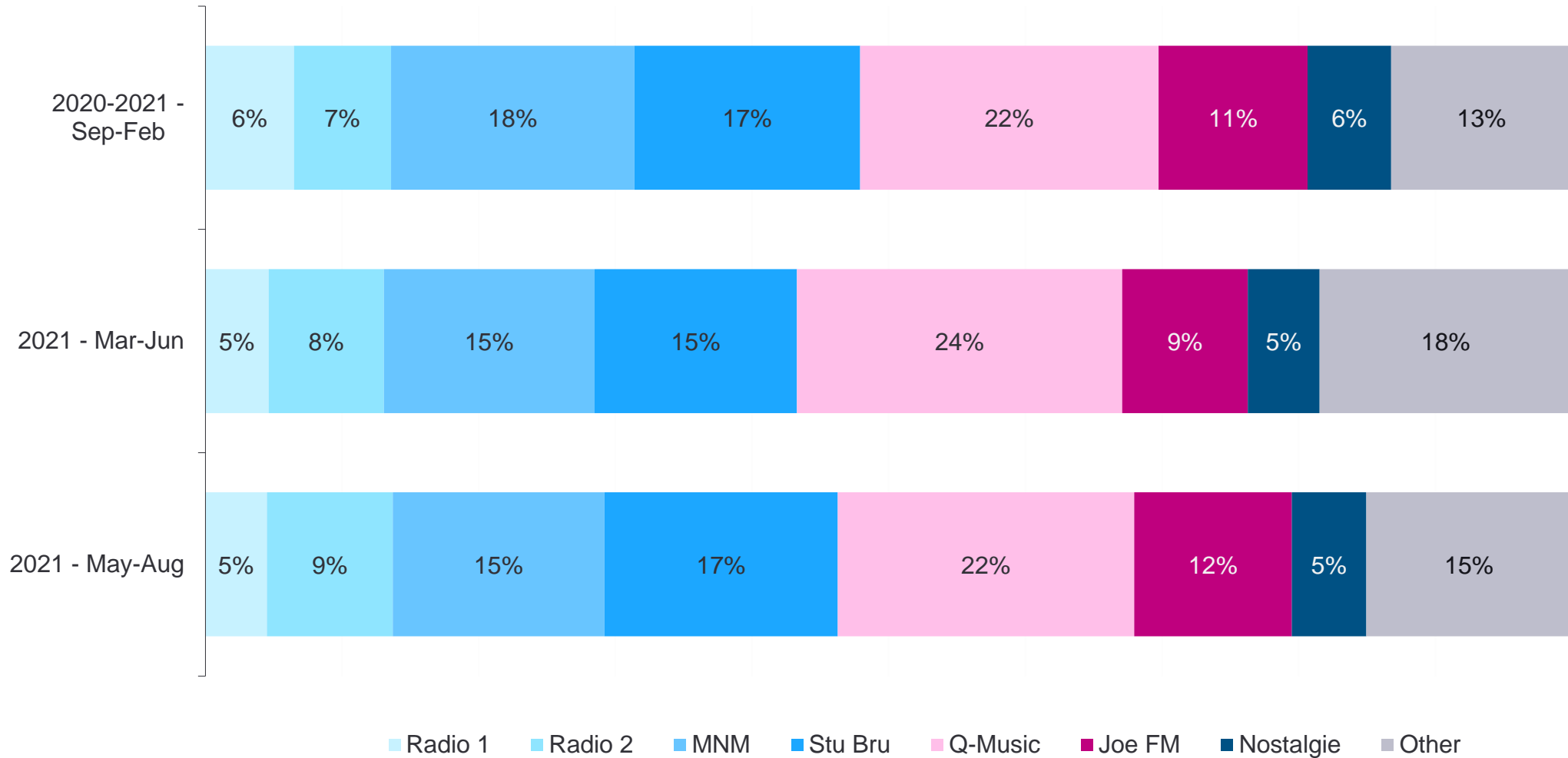
# KEY RADIO FIGURES NORTH

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



# KEY RADIO FIGURES NORTH

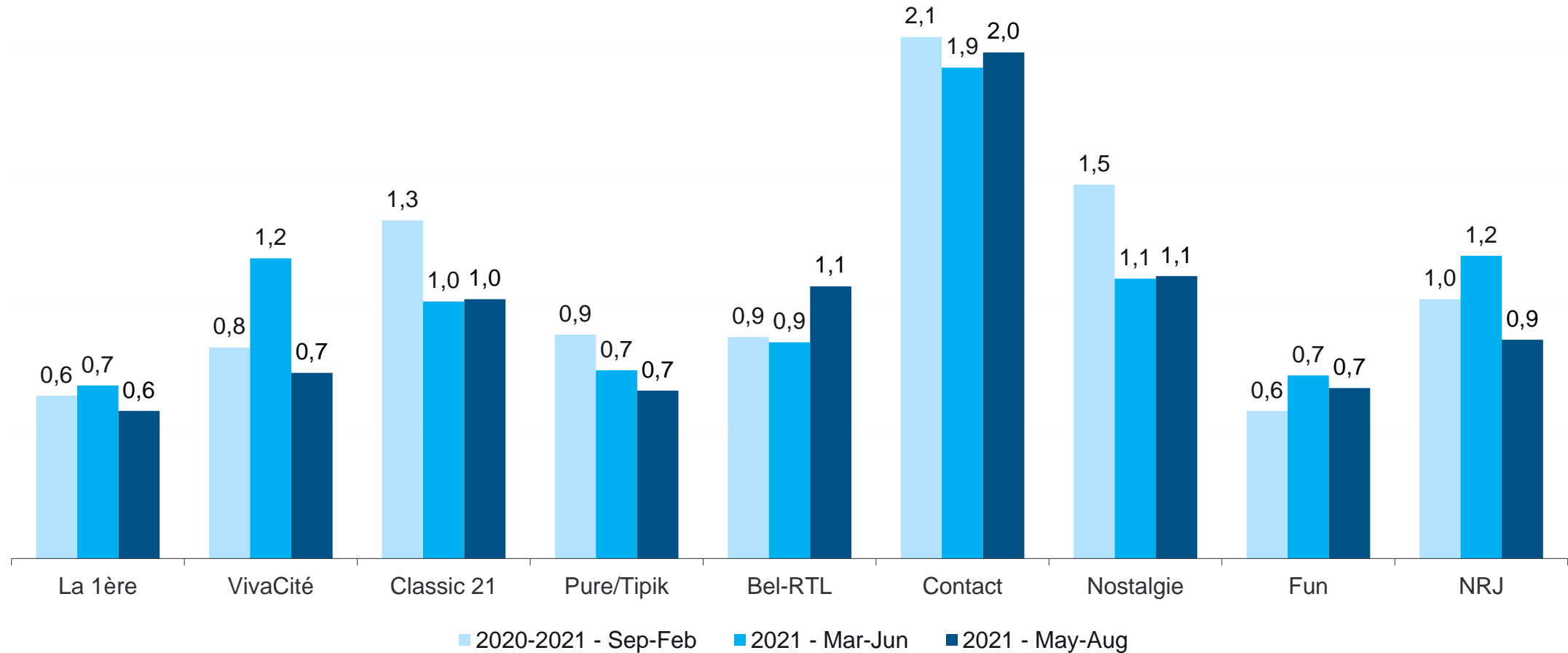
## Audience Shares (%) on ALL 18-44 - 07:00-19:00





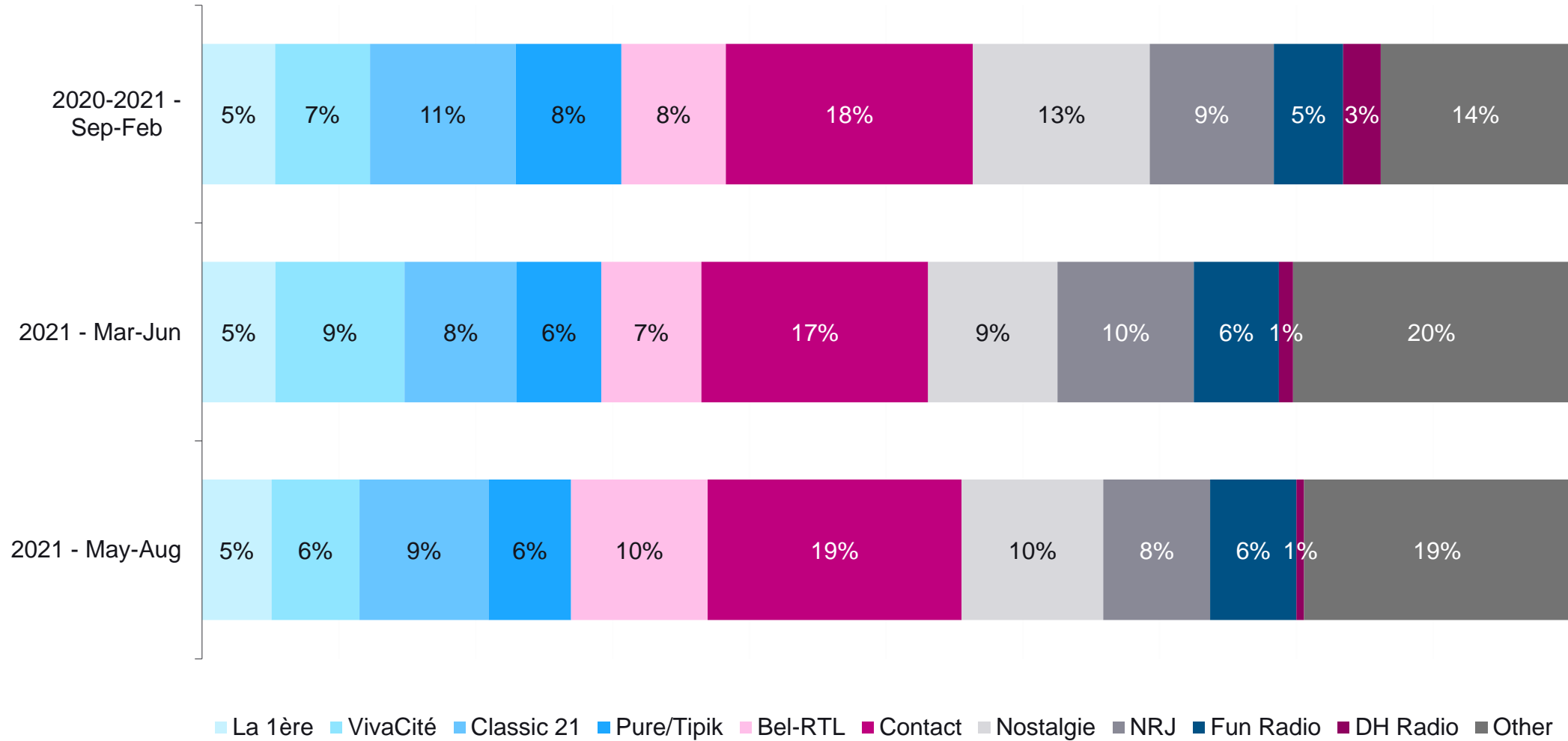
# KEY RADIO FIGURES SOUTH

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
<b>Total North</b>	<b>799.462</b>	<b>↓ 98</b>	<b>20%</b>	<b>↑ 119</b>	<b>Total South</b>	<b>310.028</b>	<b>→ 100</b>	<b>30%</b>	<b>↑ 138</b>

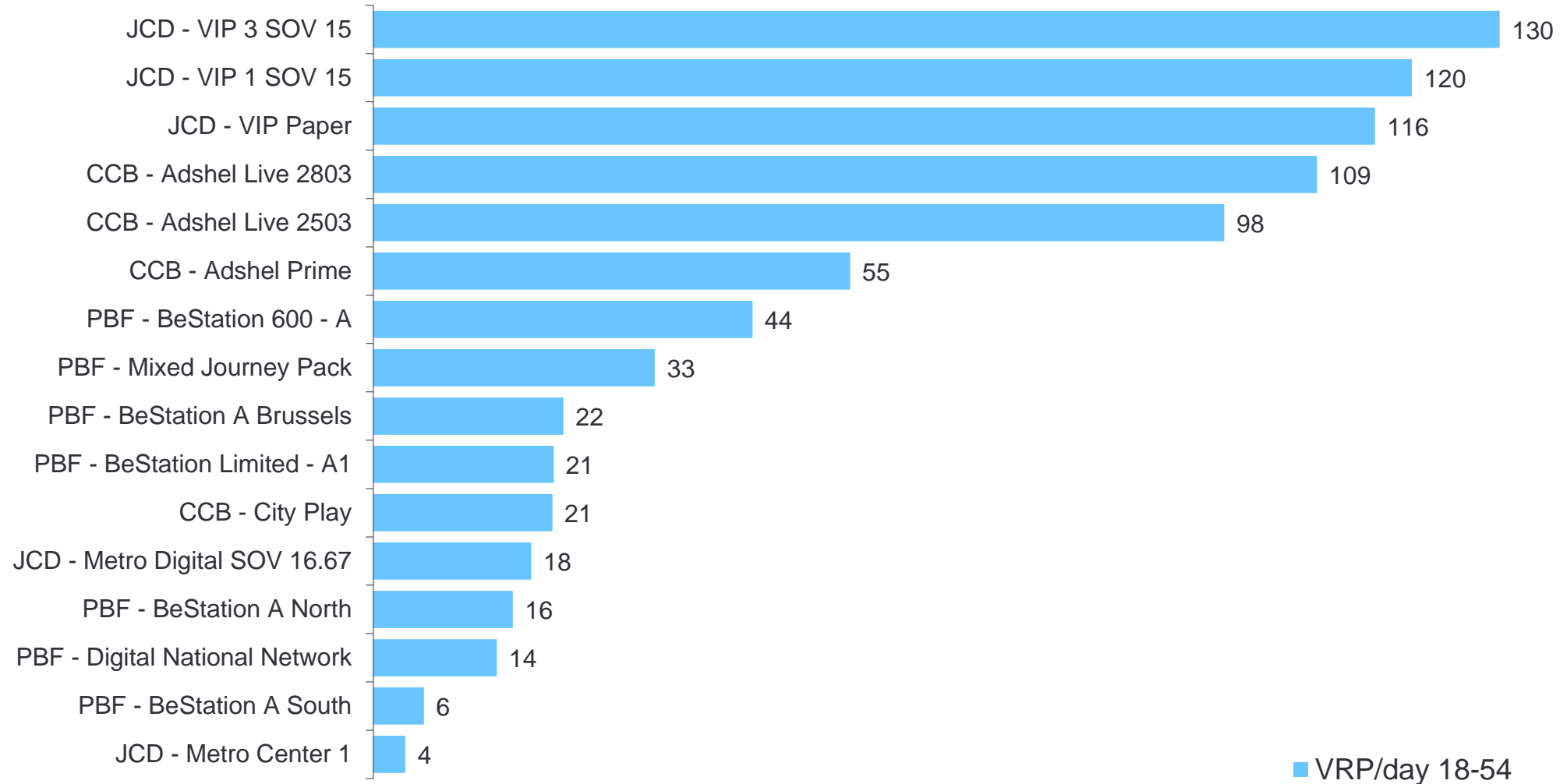
# Key Print Figures - Magazines Circulation - Year 2020 (Paid + Free - digital sales included)

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

