



space

CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

June 2020



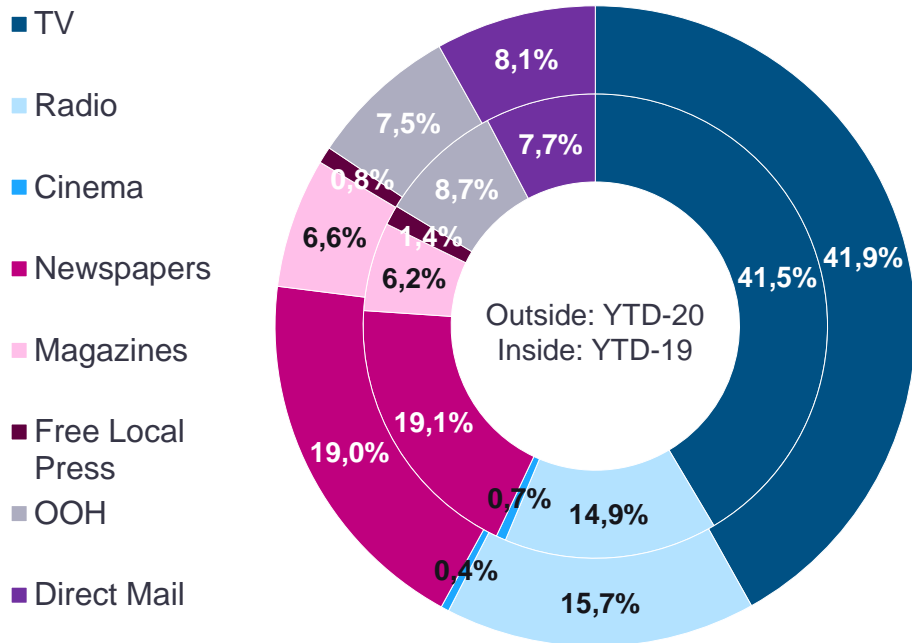
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-May 2020

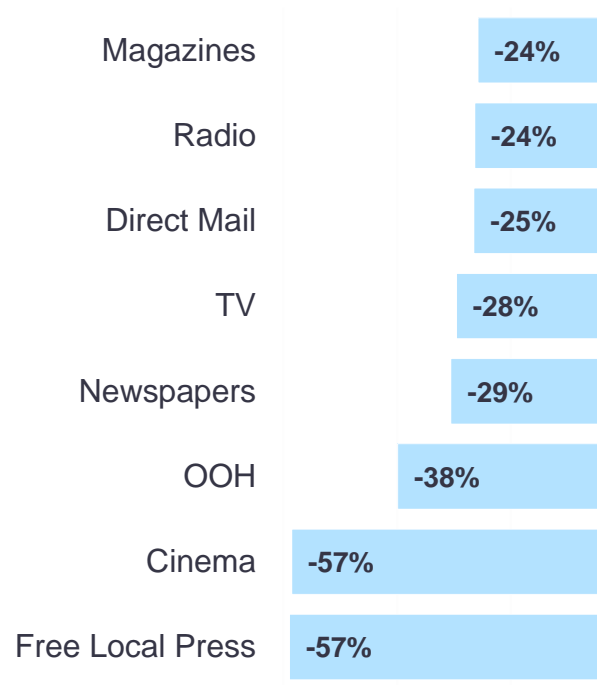
NB : No Internet figures in MDB for 2019 & 2020

Market	National	North	South
<ul style="list-style-type: none"> € Mo vs YTD-19 % Region 	1.124,6 - 28,3% 100%	688,9 - 28,2% 61%	435,7 - 28,5% 39%

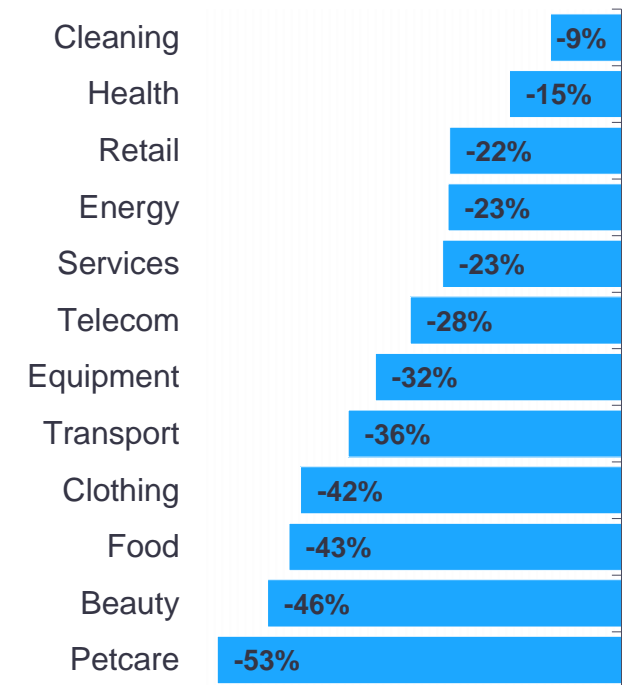
Media Mix Evol.



Media Evol. (vs YTD-19)



EcoGroups Evol. (vs YTD-19)



MDB TOP 30 ADVERTISERS - Jan-May 2020

NB : No Internet figures in MDB for 2019 & 2020

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
1	COLRUYT GROUP	42,1	↑ 102
2	PROCTER & GAMBLE BENELUX	36,2	↓ 83
3	D'IETEREN GROUP	20,2	↓ 61
4	AHOLD DELHAIZE	19,4	→ 100
5	PSA GROUPE	15,5	↓ 55
6	UNILEVER	13,6	↓ 58
7	TELENET GROUP HOLDING	13,0	↓ 79
8	PROXIMUS GROUP	12,0	↓ 55
9	RENAULT-NISSAN ALLIANCE	11,9	↓ 84
10	RECKITT & BENCKISER	11,8	↓ 55
11	ALDI	11,7	↑ 143
12	ORANGE	10,3	↓ 85
13	THE WALT DISNEY COMPANY	9,0	↓ 79
14	CARREFOUR GROUP	8,5	↓ 60
15	VINTED	8,4	↓ 52

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
16	GROUPE 3 SUISESSES	8,3	→ 100
17	FERRERO	8,3	↓ 57
18	LOTERIE NATIONALE	8,3	↓ 90
19	LIDL & CO	8,2	↑ 127
20	NETHYS	8,2	↑ 119
21	BMW GROUP BELGIUM	7,7	↑ 124
22	PEPSICO	7,3	↑ 118
23	THE COCA-COLA COMPANY	7,1	↓ 35
24	NESTLE GROUP	7,0	↑ 129
25	AS WATSON	6,8	↓ 86
26	BEIERSDORF	6,8	↓ 76
27	L'OREAL GROUP	6,3	↓ 49
28	HENKEL	6,3	↑ 111
29	PERRIGO	6,0	↓ 91
30	MONDELEZ INTERNATIONAL	5,7	↓ 56



Key TV figures

Key TV figures North - Jun-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Jun-20	YTD	Jun-20	YTD	Jun-20	YTD
VTM	PRP 18-54	4,8	7,3	22,1	25,5	1.102	833
Q2	PRP 18-44	1,5	1,8	8,4	7,2	1.060	797
VITAYA	PRP 18-54	1,2	1,3	5,6	4,4	687	602
CAZ	MEN 18-54	0,7	0,6	3,7	2,3	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	1,8	3,2	8,2	11,3	1.422	987
VIJF	PRP 18-54	1,3	1,7	5,9	6,0	1.095	770
ZES	PRP 18-54	0,6	0,6	2,7	2,2	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	21,7	28,6				
Total TV	PRP 18-44	18,4	24,8				
Total TV	MEN 18-54	18,3	23,6				

Key TV indexes North - Jun-20

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	
		Jun-20	YTD	Jun-20	YTD	Jun-20	YTD
VTM	PRP 18-54	↓ 93	↑ 110	↓ 97	↑ 105	✗ 108	✓ 94
Q2	PRP 18-44	↑ 131	↑ 104	↑ 139	→ 100	✗ 111	✓ 96
VITAYA	PRP 18-54	↓ 85	↓ 93	↓ 88	↓ 89	✓ 82	✓ 82
CAZ	MEN 18-54	↑ 174	↑ 115	↑ 177	↑ 108	Package	Package
VIER	PRP 18-54	↓ 74	↓ 94	↓ 78	↓ 90	✗ 135	⚠ 101
VIJF	PRP 18-54	↑ 104	↑ 105	↑ 109	→ 101	✗ 127	✓ 96
ZES	PRP 18-54	↑ 113	↑ 111	↑ 120	↑ 105	Package	Package
Total TV	PRP 18-54	↓ 96	↑ 105				
Total TV	PRP 18-44	↓ 94	↑ 104				
Total TV	MEN 18-54	→ 99	↑ 105				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Jun - 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	20 vs 19
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	29,0%	29,1%	28,7%	31,8%	111
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	86,0%	83,8%	82,1%	79,6%	97
	VHS + DVD player + Blu-Ray	"	3,9%	3,6%	2,5%	2,4%	96
	Video on demand + Digital recorder	"	8,8%	11,2%	13,9%	16,6%	119
	Game console and other devices (3)	"	1,2%	1,4%	1,6%	1,5%	95
% Time shift viewing (4)	All Channels	"	24,3%	25,4%	29,7%	32,9%	111
	Main Channels (5)	"	27,3%	29,7%	33,5%	36,5%	109
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	87	86	87	87	
	Main channels (5) - TSV	"	30	34	35	37	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	109	107	97	102	105
	All TV channels (TSV)	"	30	31	33	39	118
	All TV channels (Live + TSV)	"	139	138	131	141	108
	Other TV Screen Usage	"	30	35	37	47	127
	Total TV Screen Usage	"	169	173	168	189	112

Key TV figures South - Jun-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Jun-20	YTD	Jun-20	YTD	Jun-20	YTD
RTL-TVI	PRP 18-54	6,6	7,5	27,9	27,3	686	663
Club-RTL	MEN 18-54	0,9	1,0	5,1	5,2	1.107	1.063
Plug-RTL	ALL 15-34	0,5	0,7	4,0	4,3	704	649
TF1	PRP 18-54	3,1	3,5	12,9	12,9	571	511
La Une	PRP 18-54	3,4	4,2	14,4	15,5	711	645
La Deux	PRP 18-54	1,1	1,5	4,5	5,3	887	604
AB3	PRP 18-44	1,2	1,7	6,2	7,3	845	755
TTV	PRP 18-54	23,7	27,3				
TTV	PRP 18-44	19,4	23,4				
TTV	ALL 15-34	13,4	15,6				
TTV	MEN 18-54	17,4	19,9				

Key TV indexes South - Jun-20

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	
		Jun-20	YTD	Jun-20	YTD	Jun-20	YTD
RTL-TV1	PRP 18-54	↑ 117	↑ 104	↑ 114	↑ 103	✓ 97	✓ 83
Club-RTL	MEN 18-54	↓ 78	↓ 72	↓ 82	↓ 75	✗ 152	✗ 122
Plug-RTL	ALL 15-34	↓ 89	↑ 102	↓ 90	↑ 102	✗ 109	✓ 85
TF1	PRP 18-54	↑ 133	↑ 115	↑ 130	↑ 115	✓ 96	✓ 76
La Une	PRP 18-54	↑ 105	↑ 113	↑ 102	↑ 113	✗ 124	✓ 97
La Deux	PRP 18-54	↓ 72	↑ 105	↓ 70	↑ 105	✗ 160	✓ 96
AB3	PRP 18-44	↓ 78	↓ 66	↓ 78	↓ 66	✗ 152	✗ 117
TTV	PRP 18-54	↑ 103	→ 100				
TTV	PRP 18-44	→ 99	→ 101				
TTV	ALL 15-34	↓ 98	→ 100				
TTV	MEN 18-54	↓ 95	↓ 96				

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Jun - 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	20 vs 19
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	33,3%	32,6%	32,1%	35,2%	110
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	78,7%	76,0%	73,8%	67,7%	92
	VHS + DVD player + Blu-Ray	"	7,1%	6,6%	5,0%	3,9%	79
	Video on demand + Digital recorder	"	13,4%	16,7%	20,2%	27,2%	134
	Game console and other devices (3)	"	0,7%	0,8%	1,0%	1,2%	120
% Time shift viewing (4)	All Channels	"	18,1%	20,5%	21,6%	24,2%	112
	Main Channels (5)	"	19,8%	21,2%	21,9%	24,9%	114
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	84	88	89	
	Main channels (5) - TSV	"	51	50	51	51	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	144	133	129	123	96
	All TV channels (TSV)	"	27	27	29	32	112
	All TV channels (Live + TSV)	"	171	160	157	155	99
	Other TV Screen Usage	"	54	59	65	88	135
	Total TV Screen Usage	"	225	220	222	243	109



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Jun-20

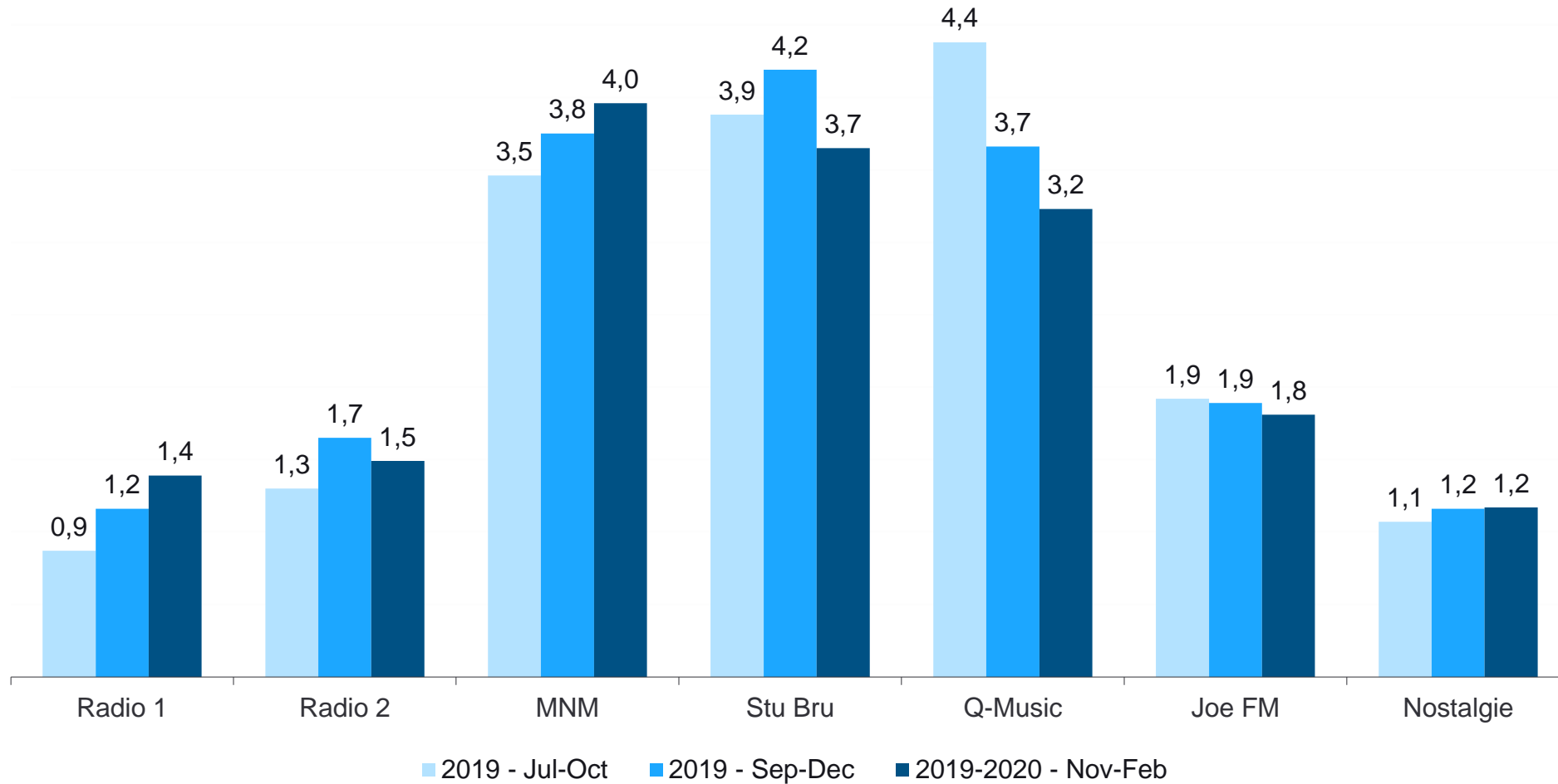
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.168.648	11	Le Soir	1.639.512
2	Nieuwsblad	3.046.512	12	Flair	1.534.848
3	VRT	2.367.204	13	Sudpresse Editions Digitales	1.505.112
4	RTBF.be	2.215.584	14	De Standaard	1.495.956
5	Sudinfo	2.159.556	15	Gazet van Antwerpen	1.344.840
6	2dehands.be/2ememain.be	2.151.660	16	L'Avenir.net	1.295.196
7	Immoweb	2.054.388	17	La Libre.be	1.283.940
8	RTL.be	1.852.284	18	De Morgen	1.248.156
9	DH.be	1.818.264	19	Vlan.be	1.209.600
10	Knack/Le Vif	1.796.592	20	Buienradar	1.175.832



Key Radio figures

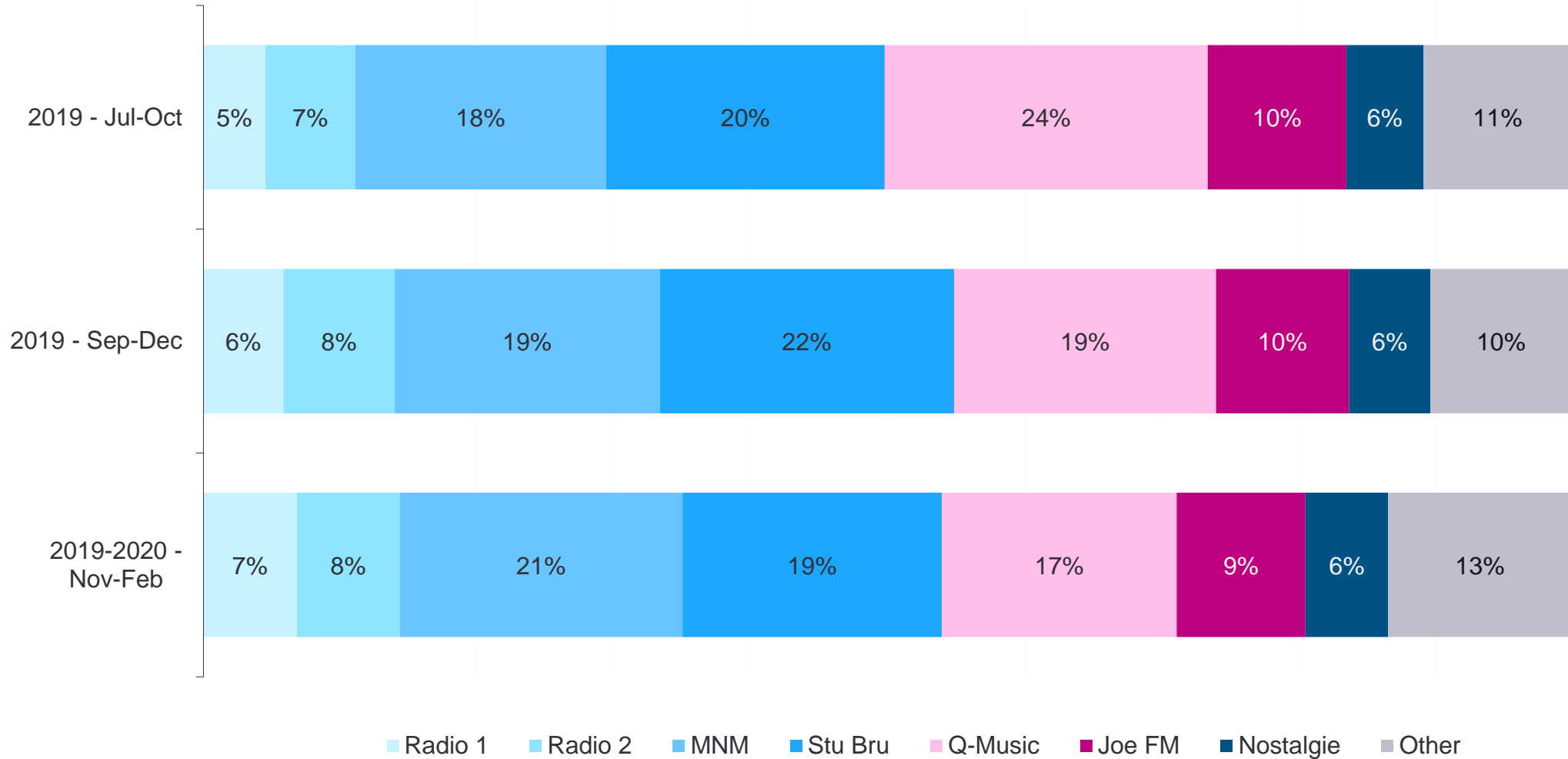
KEY RADIO FIGURES NORTH

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



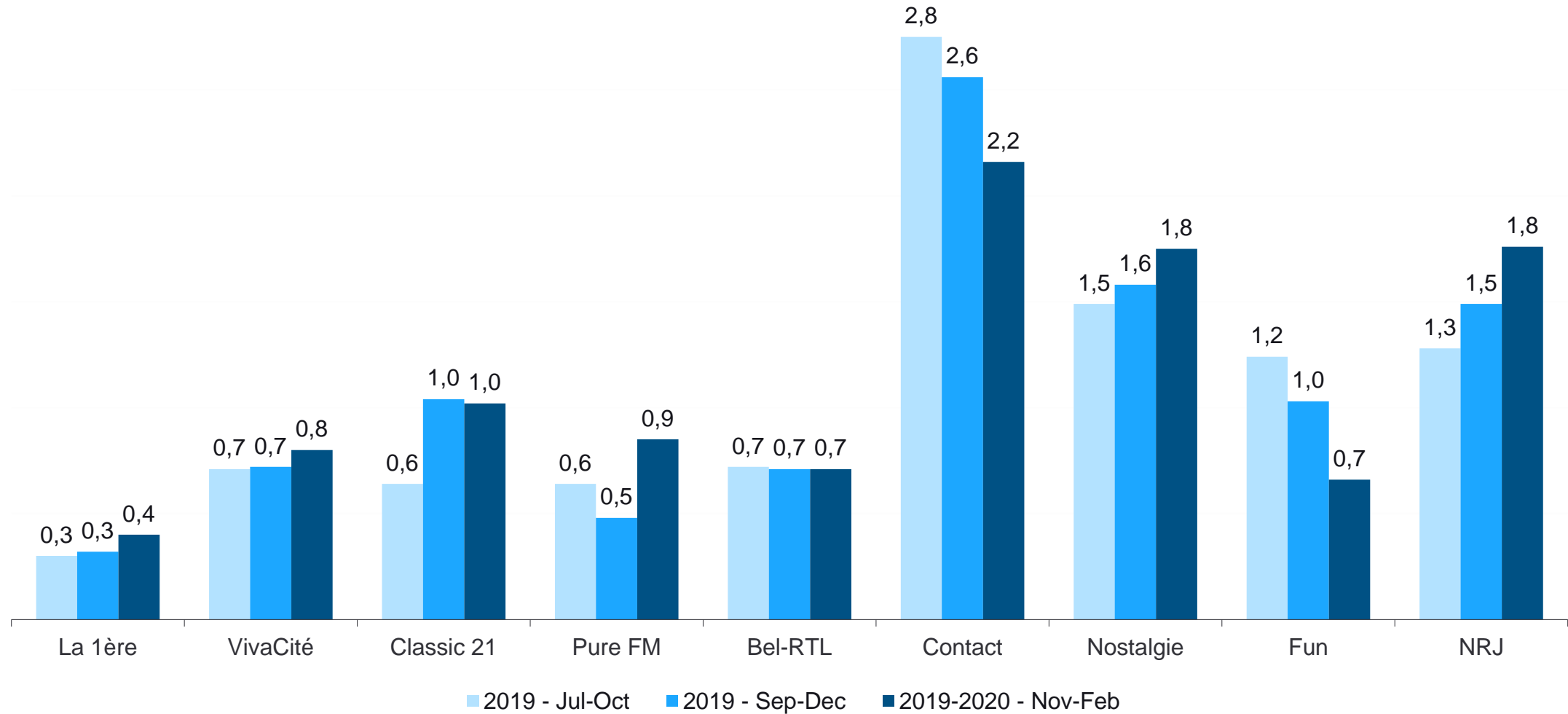
KEY RADIO FIGURES NORTH

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



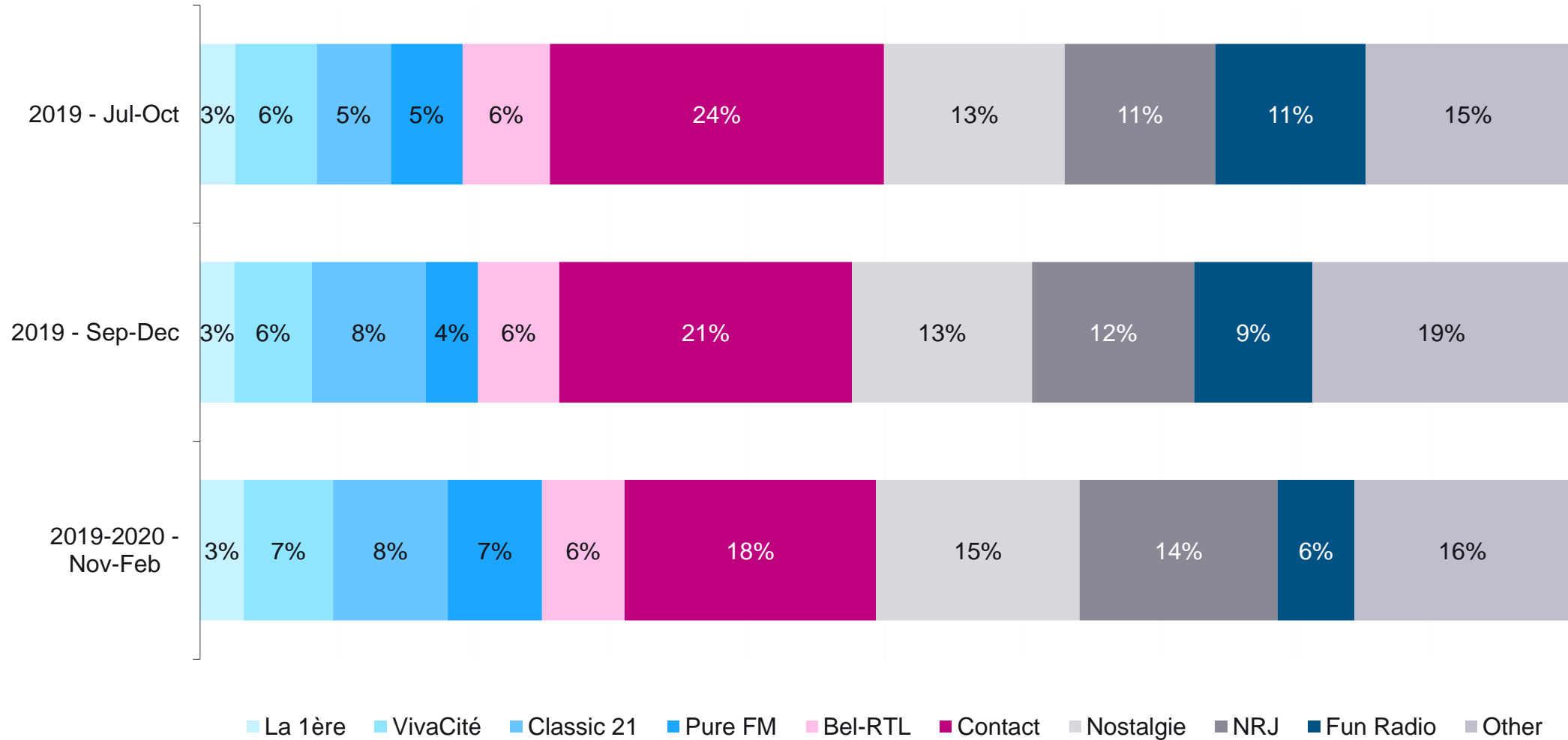
KEY RADIO FIGURES SOUTH

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	241.934	↓ 94	11%	↑ 130
Het Nieuwsblad	211.680	↓ 96	8%	↑ 119
De Standaard	104.821	↑ 101	30%	↑ 118
Het Belang van Limburg	86.448	↓ 97	11%	↑ 132
Gazet van Antwerpen	76.496	↓ 94	12%	↑ 134
De Morgen	47.491	↓ 92	40%	↑ 110
De Tijd	45.857	↑ 104	46%	↑ 107
Total North	814.727	↓ 96	17%	↑ 120

SOUTH	Circulation	vs 2018	Digital Part	vs 2018
L'Avenir	75.269	↓ 97	12%	↑ 112
Sud Presse	73.425	→ 100	17%	↑ 175
Le Soir	65.104	↑ 113	36%	↑ 193
La Libre Belgique	37.562	↑ 106	30%	↑ 133
La DH	34.993	↓ 95	17%	↑ 129
L'Echo	16.679	↑ 102	50%	↑ 108
Grenz Echo	9.667	↓ 98	8%	↑ 123
Total South	312.699	↑ 102	23%	↑ 148

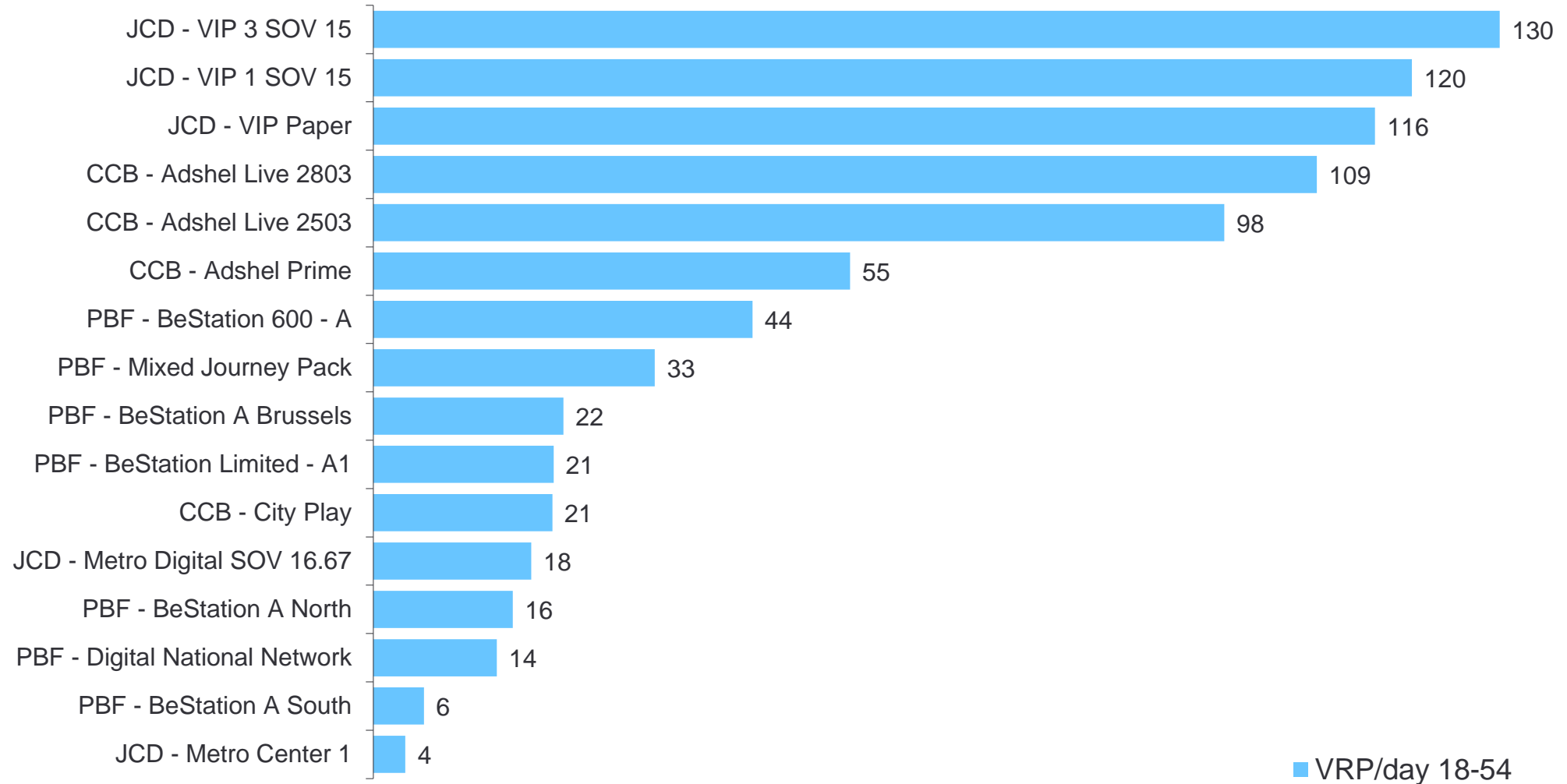
Key Print Figures - Magazines Circulation - Year 2019 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages		TOTAL	
	Circulation	vs 2018	Circulation	vs 2018	Circulation	vs 2018	Circulation	vs 2018
Television	596.383	↓ 94	372.608	↓ 93			968.991	↓ 94
Women	339.379	↓ 98	154.878	↓ 92			494.257	↓ 96
Business & News	105.989	↑ 103	131.979	↓ 97	51.365	↓ 88	289.333	↓ 98
Generation (Youth/Senior)			14.571	↓ 93	119.560	↓ 98	134.131	↓ 97
Build & Deco	36.674	↓ 91	26.853	↓ 99	28.294	↓ 74	91.821	↓ 87
Men	29.404	↓ 89	14.965	↓ 92	31.111	↓ 71	75.480	↓ 81
TOTAL	1.107.829	↓ 96	715.854	↓ 94	230.330	↓ 88	2.054.013	↓ 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

