



space

CONNECTIONS AGENCY



intelligence  
Market & Business

# MARKET PERFORMANCES BAROMETER

August 2020



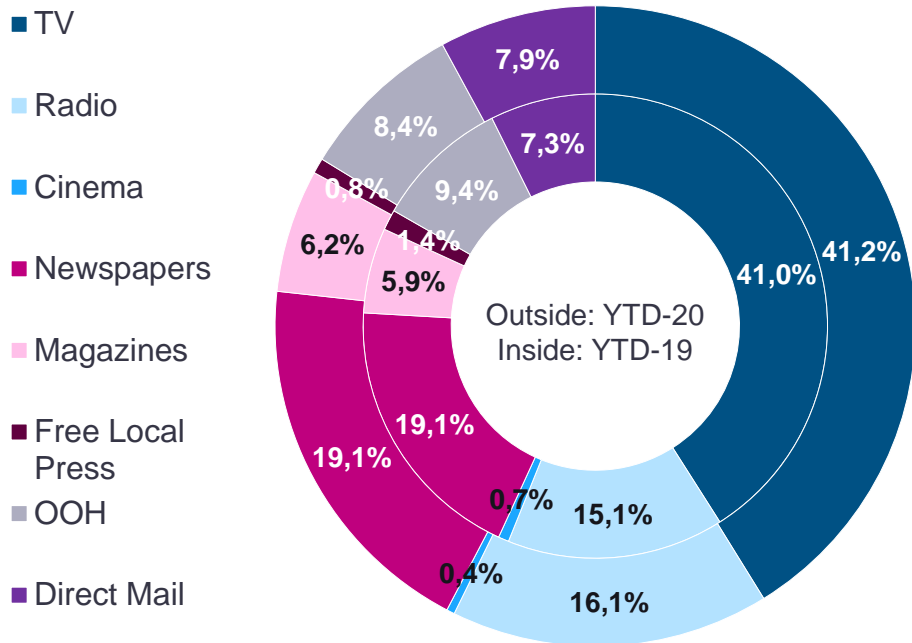
# Gross Media Investments Evolution

# GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Jul 2020

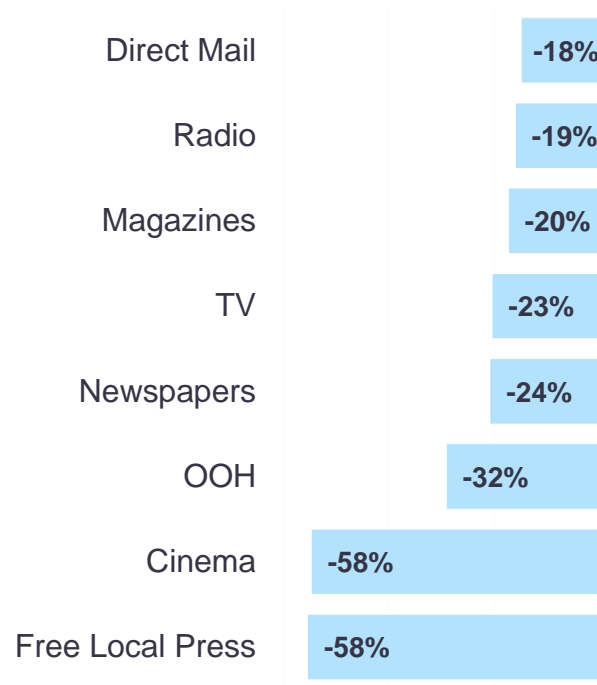
NB : No Internet figures in MDB for 2019 & 2020

Market	National	North	South
<ul style="list-style-type: none"> <li>€ Mo</li> <li>vs YTD-19</li> <li>% Region</li> </ul>	1.599,7 - 23,5% 100%	977,6 - 23,7% 61%	622,1 - 24,0% 39%

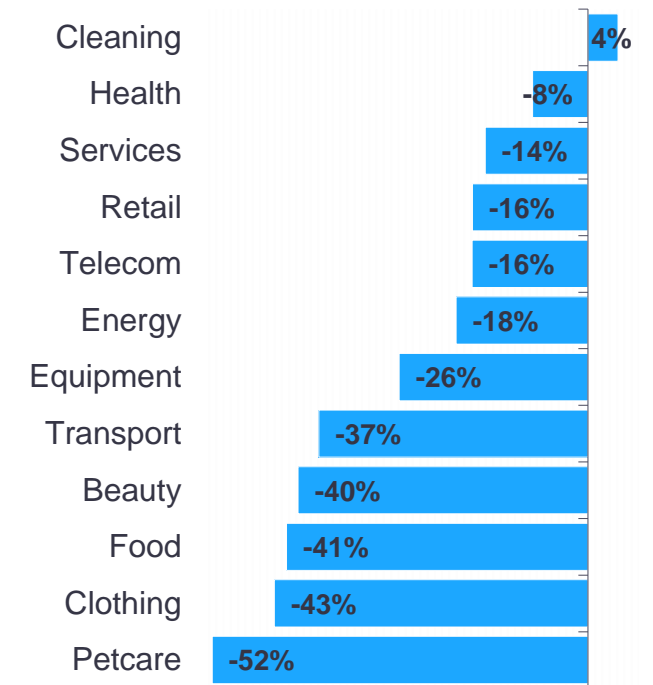
**Media Mix Evol.**



**Media Evol. (vs YTD-19)**



**EcoGroups Evol. (vs YTD-19)**



# MDB TOP 30 ADVERTISERS - Jan-Jul 2020

NB : No Internet figures in MDB for 2019 & 2020

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
1	COLRUYT GROUP	66,3	↑ 120
2	PROCTER & GAMBLE	54,2	↓ 92
3	AHOLD DELHAIZE	29,6	↑ 115
4	D'IETEREN GROUP	21,5	↓ 55
5	RECKITT & BENCKISER	21,3	↓ 71
6	UNILEVER	18,9	↓ 60
7	TELENET GROUP	18,8	↓ 94
8	PSA GROUPE	18,5	↓ 51
9	PROXIMUS GROUP	17,3	↓ 65
10	ALDI	16,8	↑ 138
11	ORANGE	15,7	↓ 89
12	RENAULT-NISSAN ALLIANCE	15,3	↓ 74
13	LOTERIE NATIONALE	13,9	↑ 107
14	CARREFOUR GROUP	13,5	↓ 76
15	THE COCA-COLA COMPANY	12,9	↓ 32

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
16	NETHYS	12,5	↑ 112
17	NESTLE GROUP	12,2	↑ 181
18	THE WALT DISNEY COMPANY	12,2	↓ 84
19	AS WATSON	11,7	↑ 105
20	GROUPE 3 SUISES	11,3	↔ 101
21	VINTED	11,2	↓ 60
22	PEPSICO	11,1	↑ 107
23	BMW GROUP	10,9	↑ 110
24	LIDL & CO	10,8	↔ 99
25	BEIERSDORF	10,4	↓ 86
26	HENKEL	9,9	↑ 157
27	L'OREAL GROUP	9,8	↓ 60
28	BNP-PARIBAS	9,2	↑ 119
29	FERRERO	8,3	↓ 43
30	SPADEL	8,0	↑ 103



# Key TV figures

# Key TV figures North - Aug-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Aug-20	YTD	Aug-20	YTD	Aug-20	YTD
VTM	PRP 18-54	5,3	6,7	24,2	25,2	673	803
Q2	PRP 18-44	1,3	1,6	6,8	7,1	933	816
VITAYA	PRP 18-54	1,0	1,2	4,7	4,5	501	579
CAZ	MEN 18-54	0,6	0,6	3,0	2,5	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	2,6	3,0	11,6	11,1	560	907
VIJF	PRP 18-54	1,0	1,5	4,6	5,7	576	753
ZES	PRP 18-54	0,6	0,6	2,9	2,4	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	22,1	26,7				
Total TV	PRP 18-44	18,8	23,0				
Total TV	MEN 18-54	18,7	22,1				

# Key TV indexes North - Aug-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	
		Aug-20	YTD	Aug-20	YTD	Aug-20	YTD
VTM	PRP 18-54	↑ 128	↑ 113	↑ 117	↑ 108	! 101	✓ 97
Q2	PRP 18-44	↓ 88	↑ 103	↓ 82	→ 100	✗ 150	✗ 105
VITAYA	PRP 18-54	↓ 80	↓ 88	↓ 73	↓ 84	✓ 92	✓ 84
CAZ	MEN 18-54	↑ 127	↑ 117	↑ 112	↑ 111	Package	Package
VIER	PRP 18-54	↑ 143	↓ 98	↑ 130	↓ 94	✓ 83	✓ 100
VIJF	PRP 18-54	↓ 94	↑ 103	↓ 85	↓ 98	✗ 106	! 101
ZES	PRP 18-54	↑ 112	↑ 113	↑ 103	↑ 107	Package	Package
Total TV	PRP 18-54	↑ 110	↑ 104				
Total TV	PRP 18-44	↑ 108	↑ 103				
Total TV	MEN 18-54	↑ 112	↑ 105				

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

Period: Jan-Aug - 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
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	27,8%	27,5%	27,2%	<b>30,0%</b>	110
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	85,3%	83,0%	81,1%	<b>78,9%</b>	97
	VHS + DVD player + Blu-Ray	"	4,2%	3,6%	2,6%	<b>2,5%</b>	96
	Video on demand + Digital recorder	"	9,2%	11,9%	14,7%	<b>17,2%</b>	117
	Game console and other devices (3)	"	1,4%	1,6%	1,7%	<b>1,4%</b>	86
<b>% Time shift viewing (4)</b>	All Channels	"	23,1%	24,6%	28,8%	<b>32,1%</b>	111
	Main Channels (5)	"	25,6%	29,2%	32,6%	<b>35,6%</b>	109
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	87	86	85	<b>86</b>	
	Main channels (5) - TSV	"	31	35	34	<b>37</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	106	102	94	<b>97</b>	103
	All TV channels (TSV)	"	27	28	31	<b>36</b>	117
	All TV channels (Live + TSV)	"	134	131	125	<b>133</b>	107
	Other TV Screen Usage	"	31	35	37	<b>47</b>	124
	Total TV Screen Usage	"	164	166	162	<b>180</b>	111



## Key TV figures South - Aug-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Aug-20	YTD	Aug-20	YTD	Aug-20	YTD
RTL-TVI	PRP 18-54	4,8	6,8	24,0	26,8	715	660
Club-RTL	MEN 18-54	1,1	1,0	7,0	5,5	641	955
Plug-RTL	ALL 15-34	0,5	0,6	4,8	4,4	513	603
TF1	PRP 18-54	2,5	3,3	12,3	12,8	506	496
La Une	PRP 18-54	2,9	3,9	14,6	15,2	406	596
La Deux	PRP 18-54	1,2	1,4	5,9	5,4	395	555
AB3	PRP 18-44	1,1	1,6	6,9	7,3	326	665
TTV	PRP 18-54	20,0	25,4				
TTV	PRP 18-44	15,8	21,6				
TTV	ALL 15-34	11,0	14,4				
TTV	MEN 18-54	15,4	18,6				

# Key TV indexes South - Aug-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	
		Aug-20	YTD	Aug-20	YTD	Aug-20	YTD
RTL-TV1	PRP 18-54	↓ 97	↑ 103	↔ 99	↑ 103	✗ 119	✓ 90
Club-RTL	MEN 18-54	↑ 111	↓ 76	↑ 109	↓ 80	✗ 103	✗ 120
Plug-RTL	ALL 15-34	↑ 200	↑ 109	↑ 201	↑ 113	✓ 90	✓ 85
TF1	PRP 18-54	↓ 98	↑ 112	↔ 99	↑ 112	✓ 100	✓ 81
La Une	PRP 18-54	↑ 106	↑ 111	↑ 108	↑ 111	✗ 106	! 101
La Deux	PRP 18-54	↑ 118	↑ 105	↑ 119	↑ 105	✓ 95	✓ 99
AB3	PRP 18-44	↓ 72	↓ 68	↓ 76	↓ 68	✓ 89	✗ 116
TTV	PRP 18-54	↔ 99	→ 100				
TTV	PRP 18-44	↓ 95	↔ 99				
TTV	ALL 15-34	↓ 98	↓ 98				
TTV	MEN 18-54	↑ 103	↓ 95				

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

Period: Jan-Aug - 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
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	31,9%	31,1%	30,5%	<b>33,2%</b>	109
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	78,1%	75,3%	72,8%	<b>67,0%</b>	92
	VHS + DVD player + Blu-Ray	"	7,3%	6,7%	4,9%	<b>4,0%</b>	81
	Video on demand + Digital recorder	"	13,9%	17,3%	21,1%	<b>27,7%</b>	131
	Game console and other devices (3)	"	0,7%	0,8%	1,2%	<b>1,3%</b>	108
<b>% Time shift viewing (4)</b>	All Channels	"	17,9%	20,0%	21,3%	<b>23,9%</b>	112
	Main Channels (5)	"	19,5%	20,5%	21,7%	<b>24,5%</b>	113
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	89	83	87	<b>88</b>	
	Main channels (5) - TSV	"	52	52	51	<b>50</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	138	127	122	<b>117</b>	95
	All TV channels (TSV)	"	26	25	27	<b>30</b>	111
	All TV channels (Live + TSV)	"	164	152	149	<b>147</b>	98
	Other TV Screen Usage	"	53	59	64	<b>85</b>	132
	Total TV Screen Usage	"	217	211	214	<b>232</b>	109



# Top websites

# Key Digital Figures - TOP BELGIAN WEBSITES - Aug-20

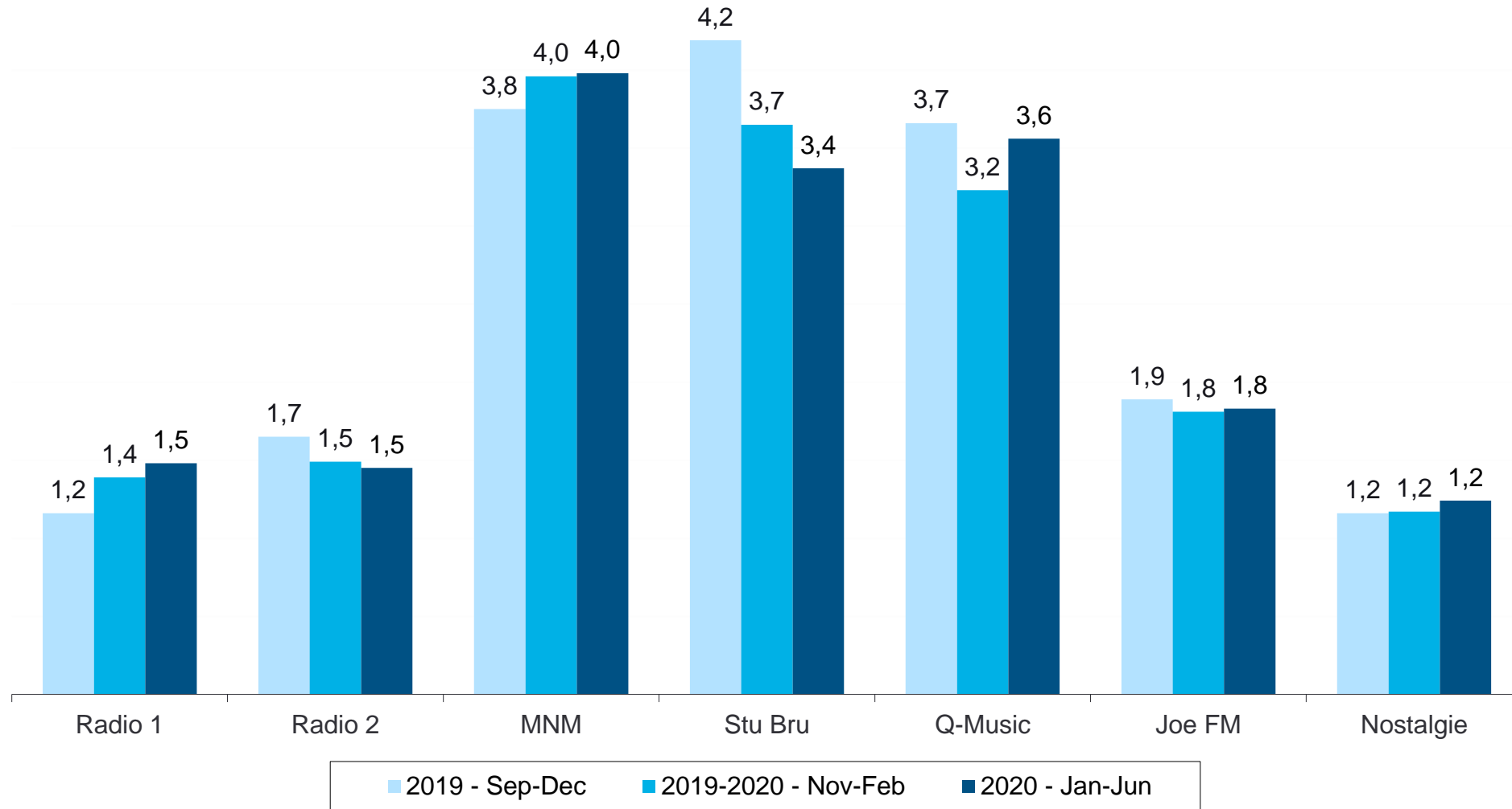
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.384.192	11	De Standaard	1.684.704
2	Nieuwsblad	3.143.028	12	Sudpresse Editions Digitales	1.534.848
3	VRT	2.594.340	13	Knack/Levif	1.513.260
4	RTBF.be	2.350.572	14	Gazet van Antwerpen	1.454.040
5	2dehands.be/2ememain.be	2.189.208	15	L'Avenir.net	1.377.936
6	Sudinfo	2.120.664	16	Sporza	1.347.696
7	RTL.be	2.114.784	17	Flair	1.319.052
8	Immoweb	1.929.564	18	La Libre.be	1.305.864
9	DH.be	1.923.516	19	Buienradar	1.230.852
10	Le Soir	1.796.592	20	7sur7.be	1.221.276



# Key Radio figures

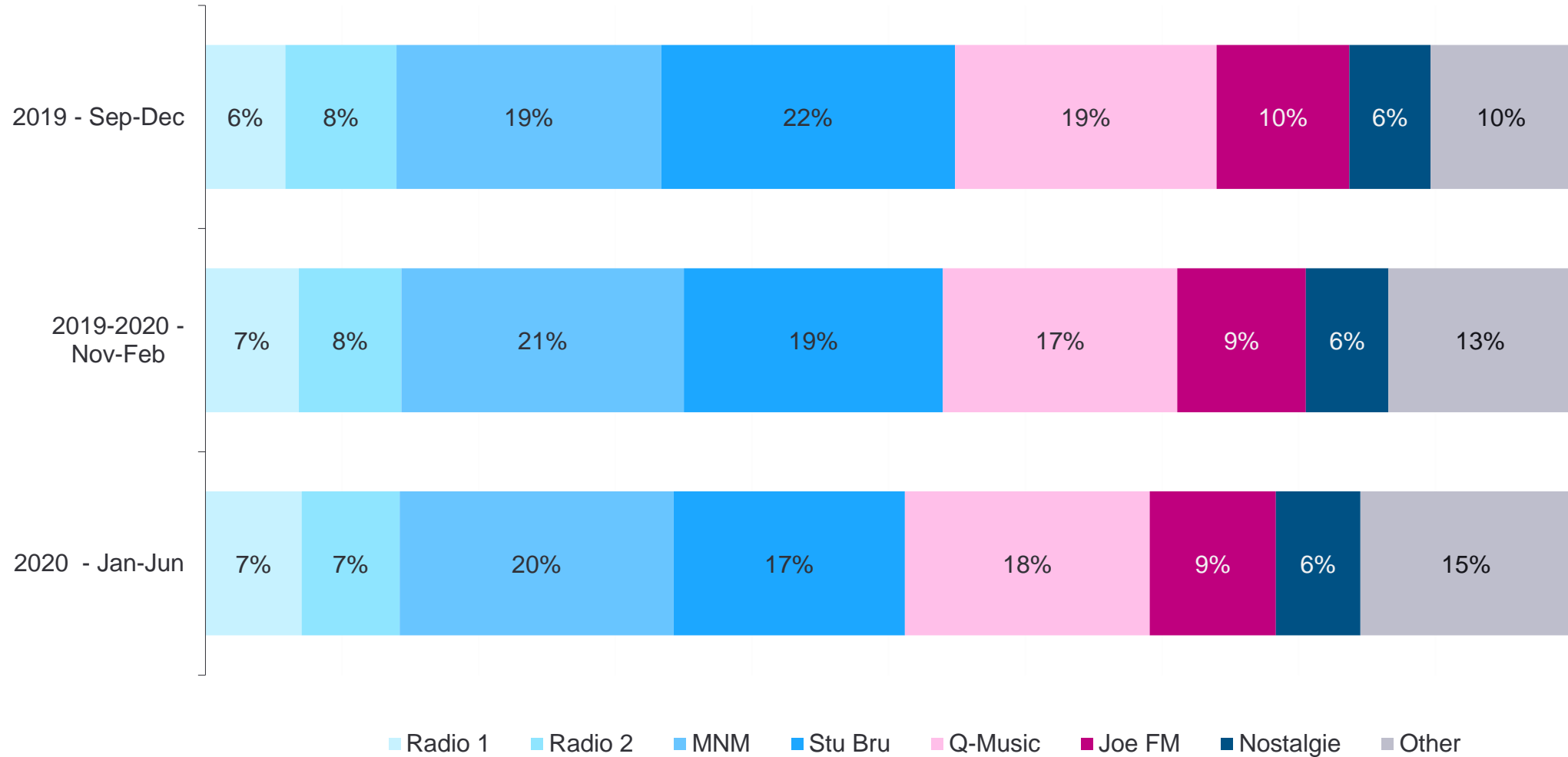
# KEY RADIO FIGURES NORTH

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



# KEY RADIO FIGURES NORTH

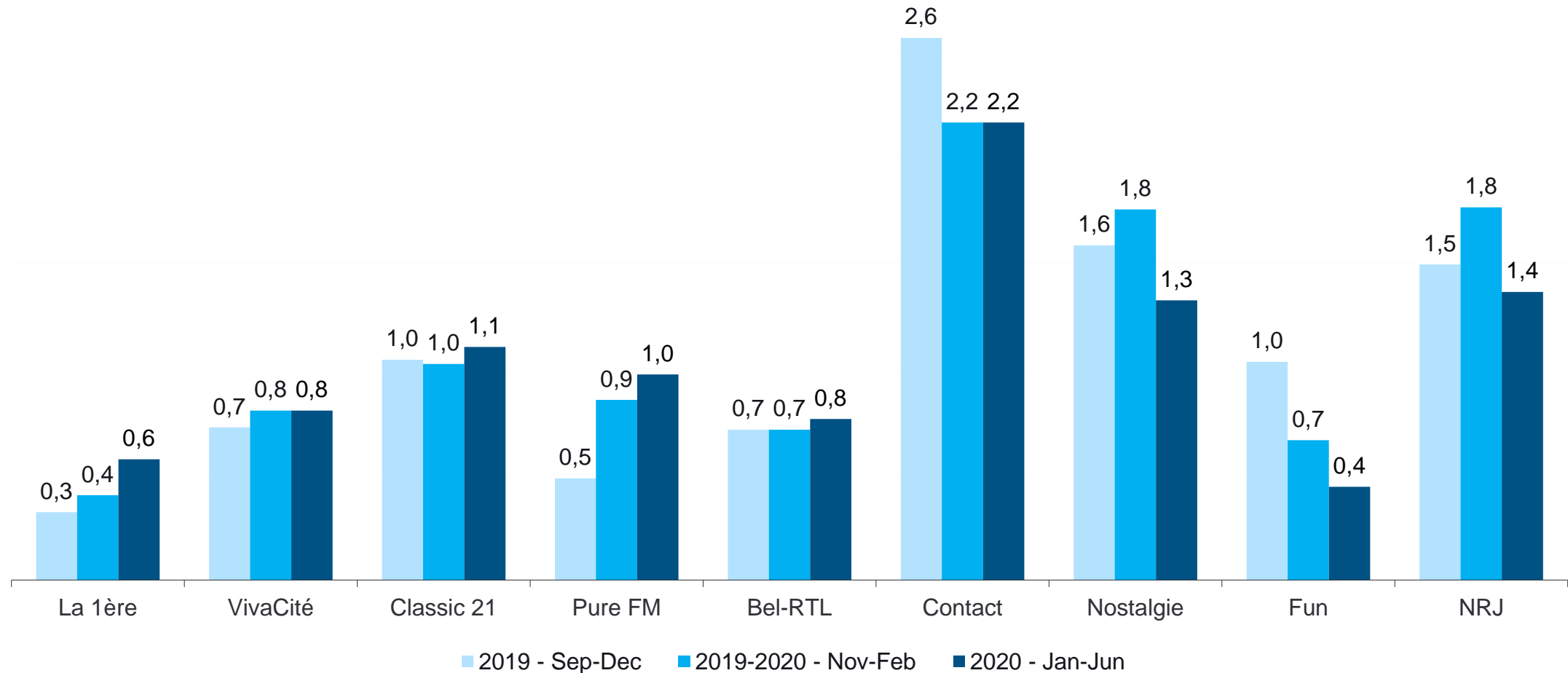
## Audience Shares (%) on ALL 18-44 - 07:00-19:00





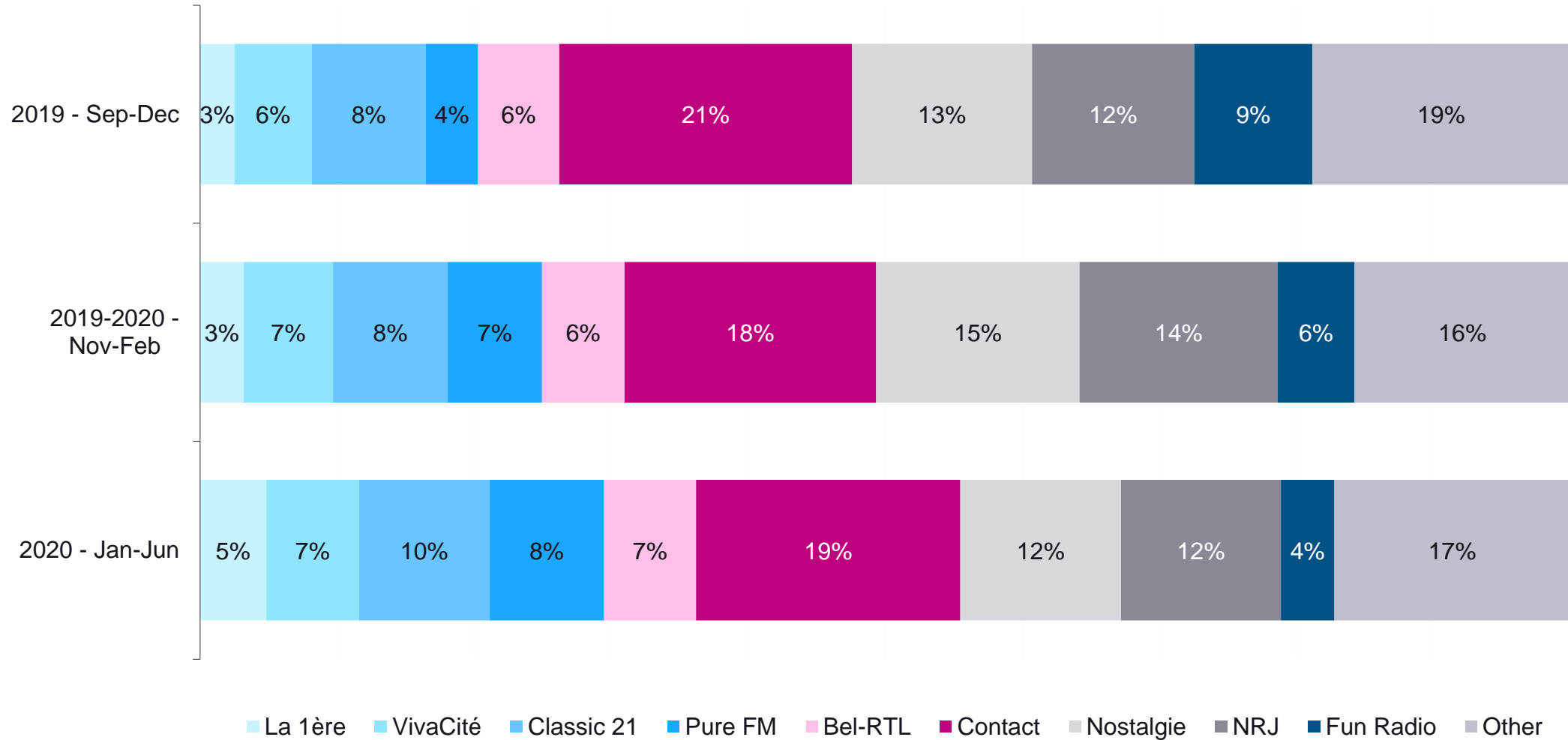
# KEY RADIO FIGURES SOUTH

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
<b>Total North</b>	<b>814.727</b>	<b>↓ 96</b>	<b>17%</b>	<b>↑ 120</b>

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
<b>Total South</b>	<b>312.699</b>	<b>↑ 102</b>	<b>23%</b>	<b>↑ 148</b>

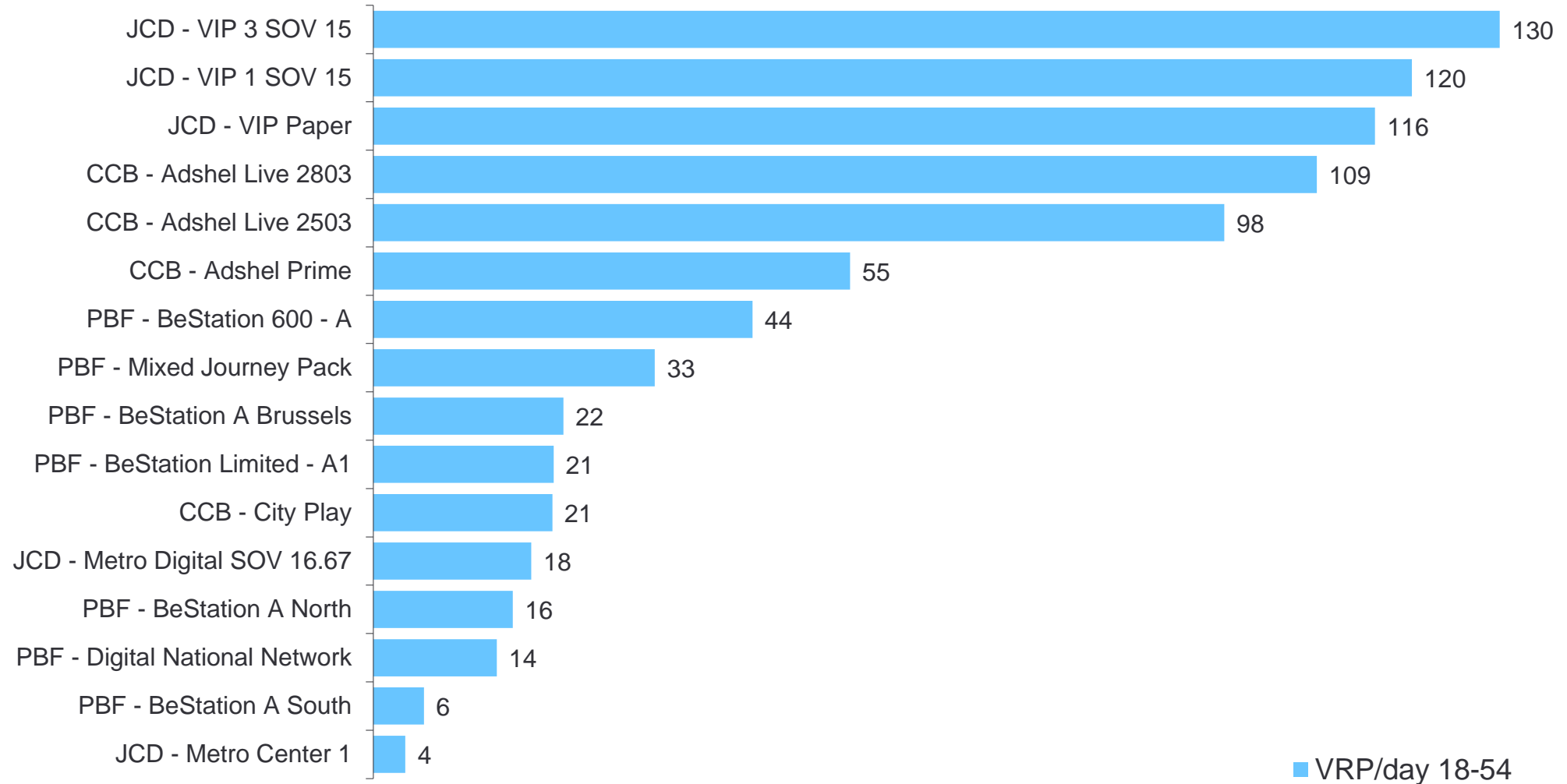
# Key Print Figures - Magazines Circulation - Year 2019 (Paid + Free - digital sales included)

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
<b>TOTAL</b>	<b>1.107.829</b>	<b>↓ 96</b>	<b>715.854</b>	<b>↓ 94</b>	<b>230.330</b>	<b>↓ 88</b>	<b>2.054.013</b>	<b>↓ 94</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

