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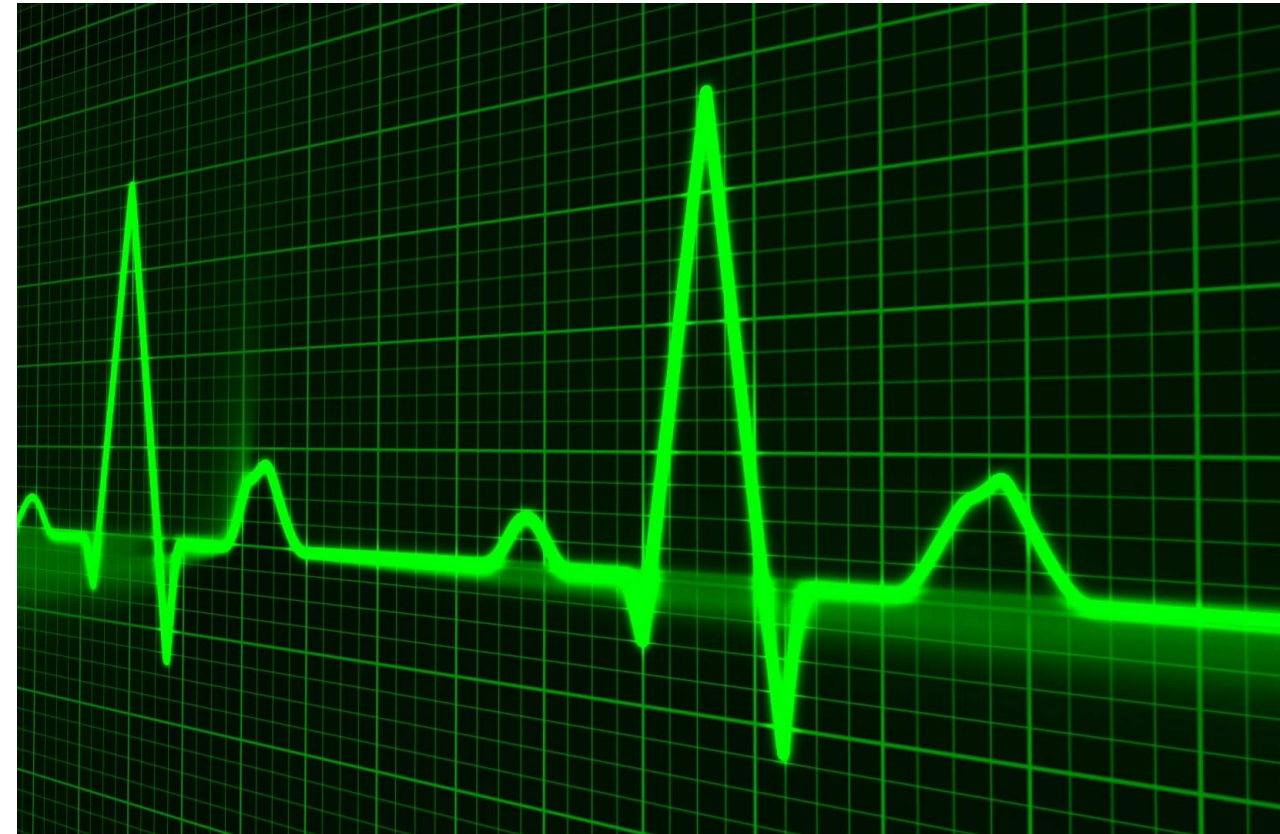
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

June 2021



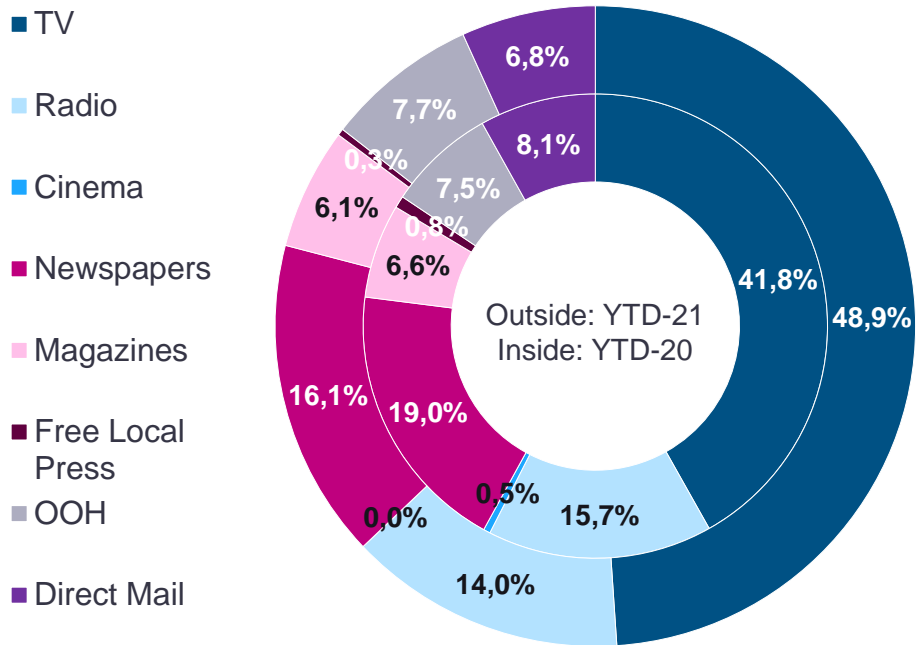
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-May 2021

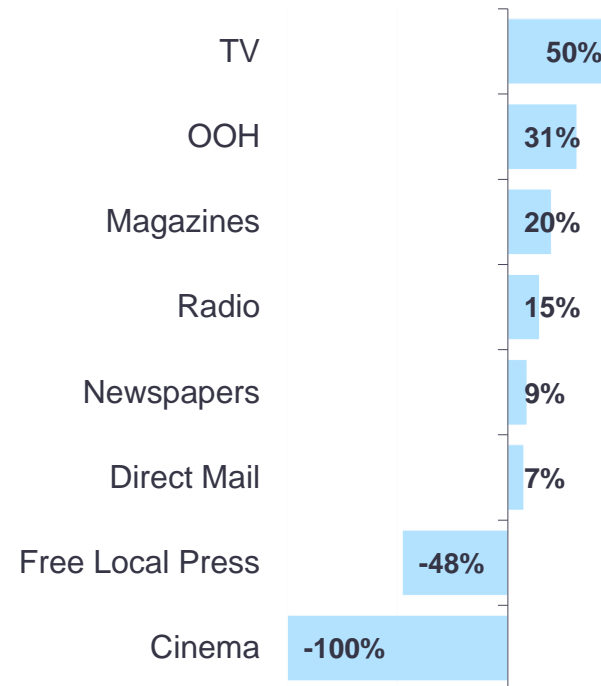
NB : No Internet figures in MDB for 2020 & 2021

Market	National	North	South
<ul style="list-style-type: none"> ■ € Mo ■ vs YTD-20 ■ % Region 	1.444,1 + 28,3% 100%	888, + 28,9% 61,5%	555,7 + 27,2% 38,5%

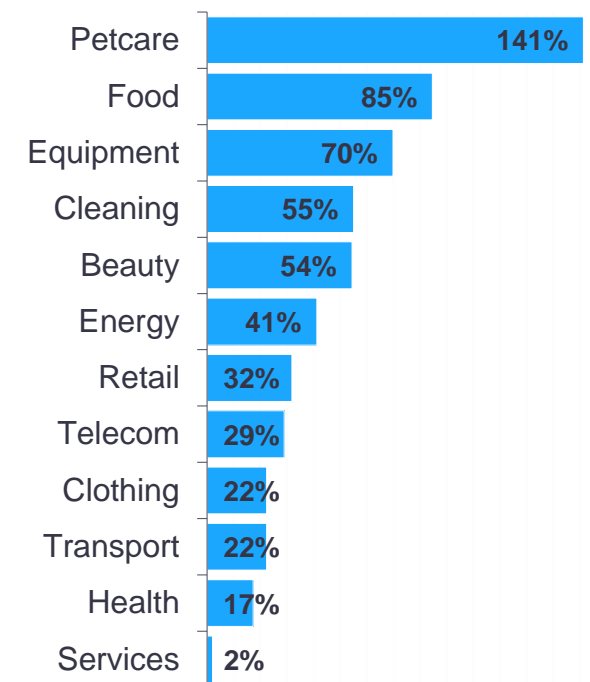
Media Mix Evol.



Media Evol. (vs YTD-20)



EcoGroups Evol. (vs YTD-20)



MDB TOP 30 ADVERTISERS - Jan-May 2021

NB : No Internet figures in MDB for 2020 & 2021

Rank	ADV.GROUP	Gross Inv.	vs 2020
1	COLRUYT GROUP	57,9	↑ 137
2	PROCTER & GAMBLE	55,6	↑ 154
3	AHOLD DELHAIZE	30,9	↑ 160
4	D'IETEREN GROUP	30,9	↑ 153
5	THE COCA-COLA COMPANY	26,2	↑ 336
6	UNILEVER	22,4	↑ 165
7	TELENET GROUP HOLDING	20,0	↑ 154
8	RECKITT & BENCKISER	16,7	↑ 141
9	PSA GROUPE	15,8	↑ 102
10	PROXIMUS GROUP	13,9	↑ 116
11	RENAULT-NISSAN ALLIANCE	13,3	↑ 112
12	L'OREAL GROUP	13,1	↑ 209
13	LOTERIE NATIONALE	12,9	↑ 157
14	FERRERO	12,2	↑ 147
15	ORANGE	11,9	↑ 113

Rank	ADV.GROUP	Gross Inv.	vs 2020
16	NETHYS	11,8	↑ 145
17	BMW GROUP BELGIUM	11,6	↑ 150
18	VINTED	11,5	↑ 137
19	AS WATSON	11,5	↑ 168
20	NESTLE GROUP	11,3	↑ 153
21	LIDL & CO	10,5	↑ 128
22	MONDELEZ INTERNATIONAL	10,3	↑ 180
23	CARREFOUR GROUP	9,7	↑ 114
24	HELLOFRESH	9,7	↑ 209
25	HENKEL	9,4	↑ 150
26	ALDI	9,2	↓ 78
27	COOLBLUE	9,1	↑ 316
28	BEIERSDORF	8,5	↑ 125
29	GROUPE 3 SUISES	8,2	↘ 99
30	AXA GROUP	8,1	↑ 159



Key TV figures

Key TV figures North - Jun-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Jun-21	YTD-21	Jun-21	YTD-21	Jun-21	YTD-21
VTM	PRP 18-54	4,1	6,4	19,8	24,7	31,5	184,3
VTM2	PRP 18-54	0,9	1,5	4,1	5,8	7,6	44,0
VTM3	PRP 18-54	0,6	0,9	2,9	3,6	7,1	29,0
VTM4	MEN 18-54	0,4	0,6	2,3	2,6	4,5	17,4
Play4	PRP 18-54	1,3	3,1	6,4	12,2	10,9	90,8
Play5	PRP 18-54	0,7	1,1	3,4	4,3	5,2	36,5
Play6	PRP 18-54	0,5	0,6	2,4	2,3	4,6	18,7
Total TV	PRP 18-54	20,7	25,7				
Total TV	MEN 18-54	18,3	21,0				

Key TV indexes North - Jun-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	
		Jun-21	YTD-21	Jun-21	YTD-21	Jun-21	YTD-21
VTM	PRP 18-54	↓ 85	↓ 87	↓ 90	↓ 97	↑ 114	↑ 135
VTM2	PRP 18-54	↓ 55	↓ 84	↓ 58	↓ 94	↑ 116	↑ 156
VTM3	PRP 18-54	↓ 50	↓ 73	↓ 53	↓ 81	↑ 184	↑ 163
VTM4	MEN 18-54	↓ 63	→ 100	↓ 63	↑ 112	↑ 195	↑ 171
Play4	PRP 18-54	↓ 74	↓ 97	↓ 78	↑ 108	↓ 79	↑ 137
Play5	PRP 18-54	↓ 56	↓ 65	↓ 59	↓ 72	↓ 84	↑ 123
Play6	PRP 18-54	↓ 85	↓ 95	↓ 89	↑ 105	↑ 179	↑ 161
Total TV	PRP 18-54	↓ 95	↓ 90				
Total TV	MEN 18-54	→ 100	↓ 89				

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-Jun - 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
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	29,1%	28,7%	31,8%	30,3%	95
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	83,8%	82,1%	79,6%	74,0%	93
	VHS + DVD player + Blu-Ray	"	3,6%	2,5%	2,4%	1,9%	78
	Video on demand + Digital recorder	"	11,2%	13,9%	16,6%	22,8%	138
	Game console and other devices (3)	"	1,4%	1,6%	1,5%	1,1%	75
% Time shift viewing (4)	All Channels	"	25,4%	29,7%	32,9%	33,3%	101
	Main Channels (5)	"	29,7%	33,5%	36,5%	38,5%	105
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	86	87	87	80	
	Main channels (5) - TSV	"	34	35	37	36	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	107	97	102	86	84
	All TV channels (TSV)	"	31	33	39	36	91
	All TV channels (Live + TSV)	"	138	131	141	121	86
	Other TV Screen Usage	"	35	37	47	55	115
	Total TV Screen Usage	"	173	168	189	176	93

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 - Jun-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Jun-21	YTD-21	Jun-21	YTD-21	Jun-21	YTD-21
RTL-TV1	PRP 18-54	3,9	5,8	17,9	24,8	19,5	126,5
Club-RTL	MEN 18-54	0,5	1,0	2,5	5,6	2,8	18,9
Plug-RTL	ALL 15-34	0,3	0,6	2,6	4,5	1,8	10,4
TF1	PRP 18-54	1,8	2,9	8,1	12,3	5,3	27,5
La Une	PRP 18-54	5,1	4,1	23,6	17,7	11,8	54,4
Tipik	PRP 18-54	4,1	1,7	18,8	7,1	8,6	19,9
AB3	PRP 18-44	1,2	1,3	5,6	5,6	2,1	12,9
TTV	PRP 18-54	21,6	23,4				
TTV	PRP 18-44	18,9	19,1				
TTV	ALL 15-34	12,4	12,5				
TTV	MEN 18-54	17,9	18,1				

Key TV indexes South - Jun-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	
		Jun-21	YTD-21	Jun-21	YTD-21	Jun-21	YTD-21
RTL-TV1	PRP 18-54	↓ 59	↓ 78	↓ 64	↓ 91	↑ 116	↑ 142
Club-RTL	MEN 18-54	↓ 51	↓ 98	↓ 49	↑ 108	↓ 94	↑ 117
Plug-RTL	ALL 15-34	↓ 61	↓ 84	↓ 66	↑ 104	↑ 150	↑ 161
TF1	PRP 18-54	↓ 58	↓ 82	↓ 63	↓ 95	↑ 174	↑ 211
La Une	PRP 18-54	↑ 150	↓ 98	↑ 164	↑ 114	↑ 180	↑ 149
Tipik	PRP 18-54	↑ 387	↑ 114	↑ 421	↑ 133	↑ 425	↑ 179
AB3	PRP 18-44	↓ 92	↓ 77	→ 100	↓ 90	↓ 81	↓ 86
TTV	PRP 18-54	↓ 92	↓ 86				
TTV	PRP 18-44	↓ 97	↓ 82				
TTV	ALL 15-34	↓ 93	↓ 80				
TTV	MEN 18-54	↑ 103	↓ 91				

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-Jun - 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
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	32,6%	32,1%	35,2%	32,1%	91
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	76,0%	73,8%	67,7%	64,5%	95
	VHS + DVD player + Blu-Ray	"	6,6%	5,0%	3,9%	3,1%	78
	Video on demand + Digital recorder	"	16,7%	20,2%	27,2%	31,7%	117
	Game console and other devices (3)	"	0,8%	1,0%	1,2%	0,6%	49
% Time shift viewing (4)	All Channels	"	20,5%	21,6%	24,2%	27,2%	112
	Main Channels (5)	"	21,2%	21,9%	24,9%	27,7%	111
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	84	88	89	87	
	Main channels (5) - TSV	"	50	51	51	55	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	133	129	123	102	83
	All TV channels (TSV)	"	27	29	32	30	96
	All TV channels (Live + TSV)	"	160	157	155	133	86
	Other TV Screen Usage	"	59	65	88	85	97
	Total TV Screen Usage	"	220	222	243	217	90

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 - Jun-21

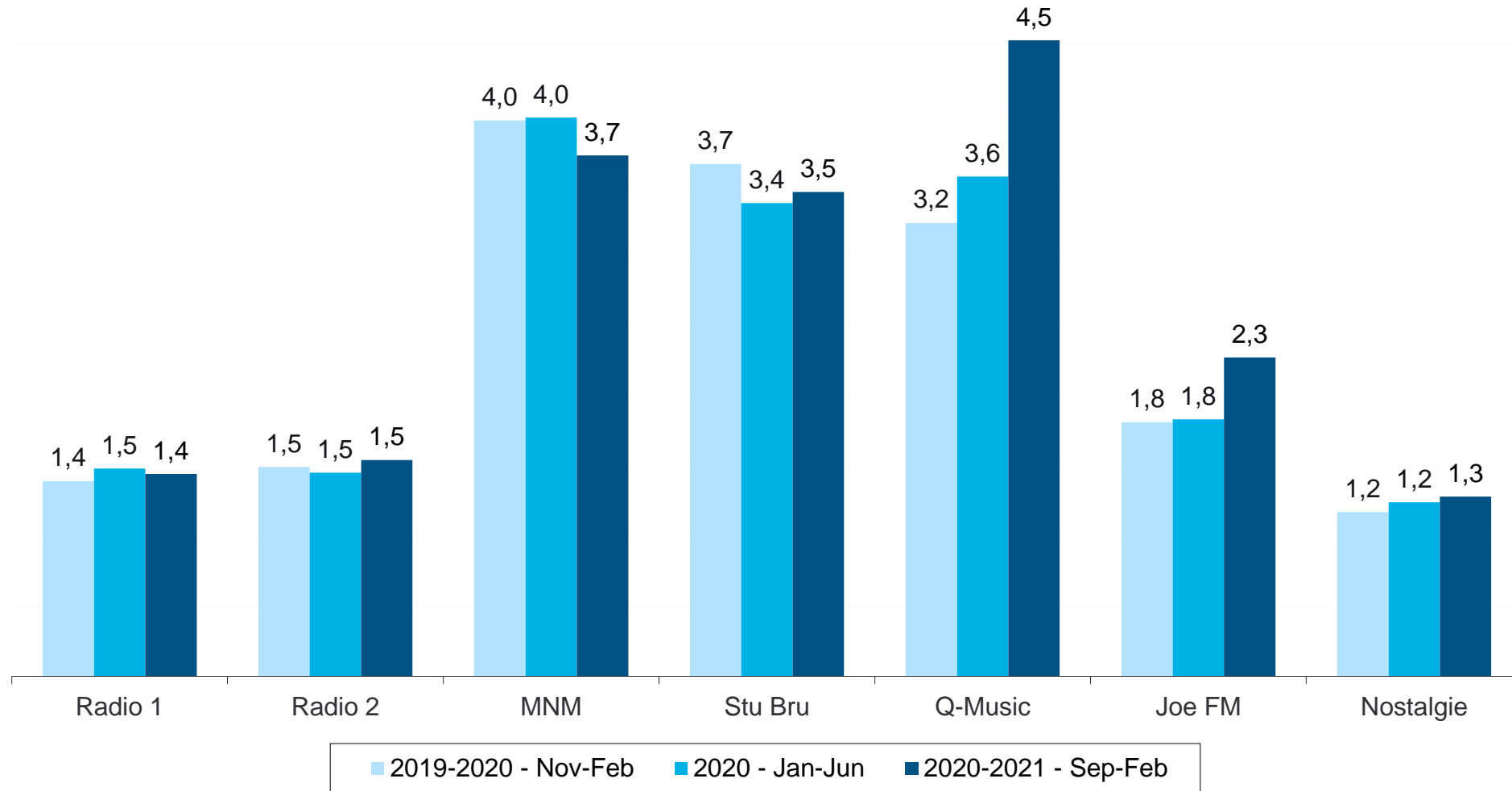
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	Nieuwsblad	2.948.568	11	Immoweb	1.566.432
2	HLN.be	2.805.180	12	La Libre.be	1.511.748
3	RTBF.be	2.363.844	13	L'Avenir.net	1.498.644
4	VRT	2.202.732	14	De Morgen	1.382.976
5	Sudinfo	2.159.892	15	De Standaard	1.325.184
6	DH.be	1.945.104	16	Gazet van Antwerpen	1.247.568
7	Le Soir	1.895.292	17	Knack/Le Vif	1.095.444
8	RTL.be	1.891.848	18	Buienradar	1.092.252
9	2dehands.be/2ememain.be	1.721.160	19	7sur7.be	1.054.620
10	Sporza	1.685.040	20	Het Belang van Limburg	995.568



Key Radio figures

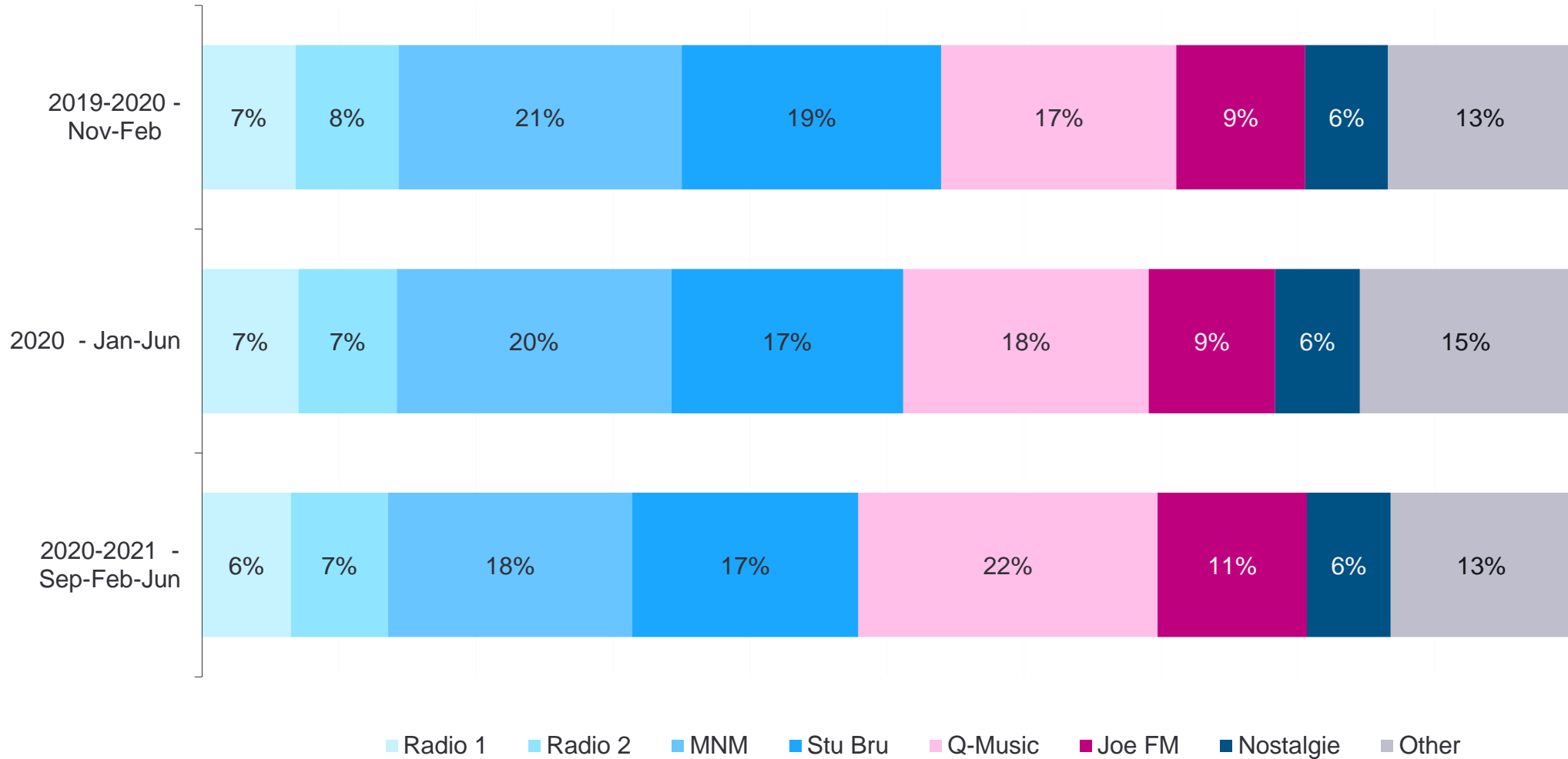
KEY RADIO FIGURES NORTH

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



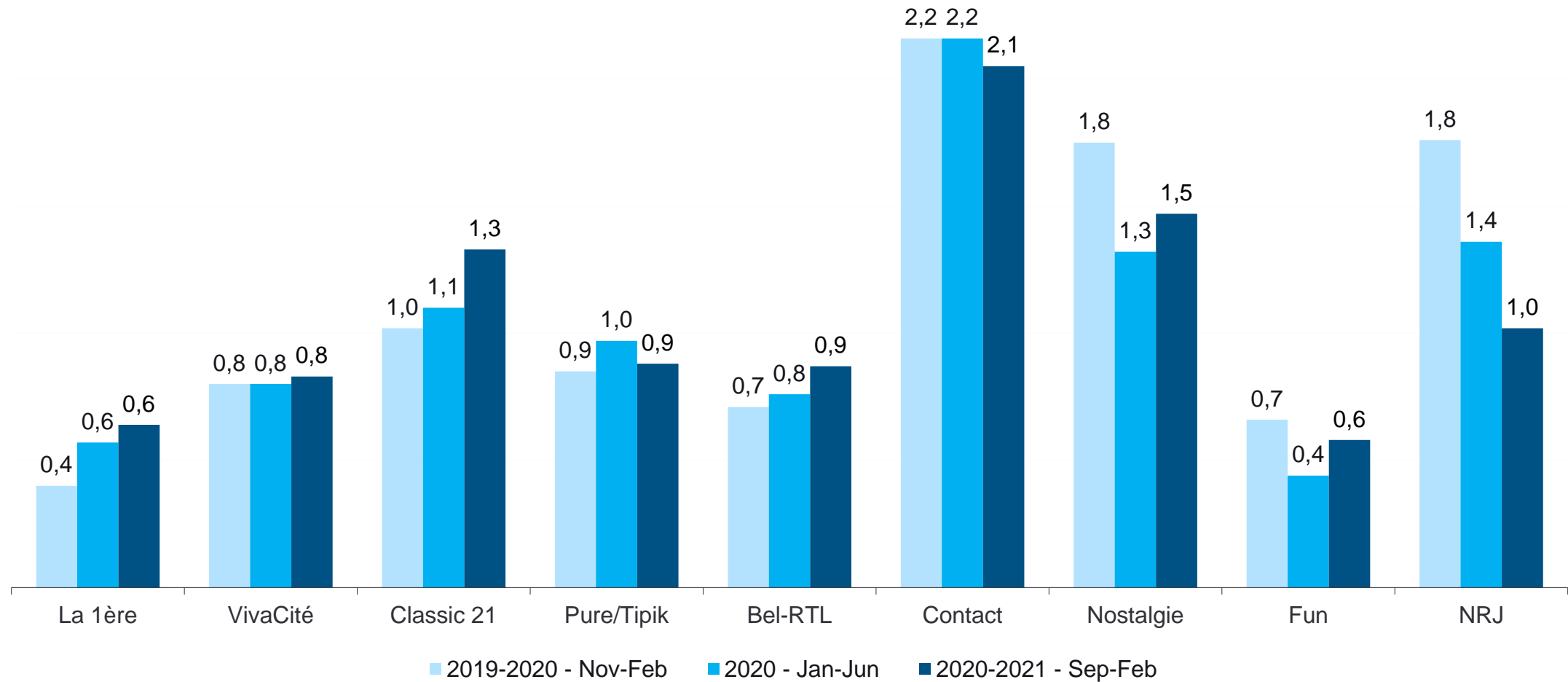
KEY RADIO FIGURES NORTH

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



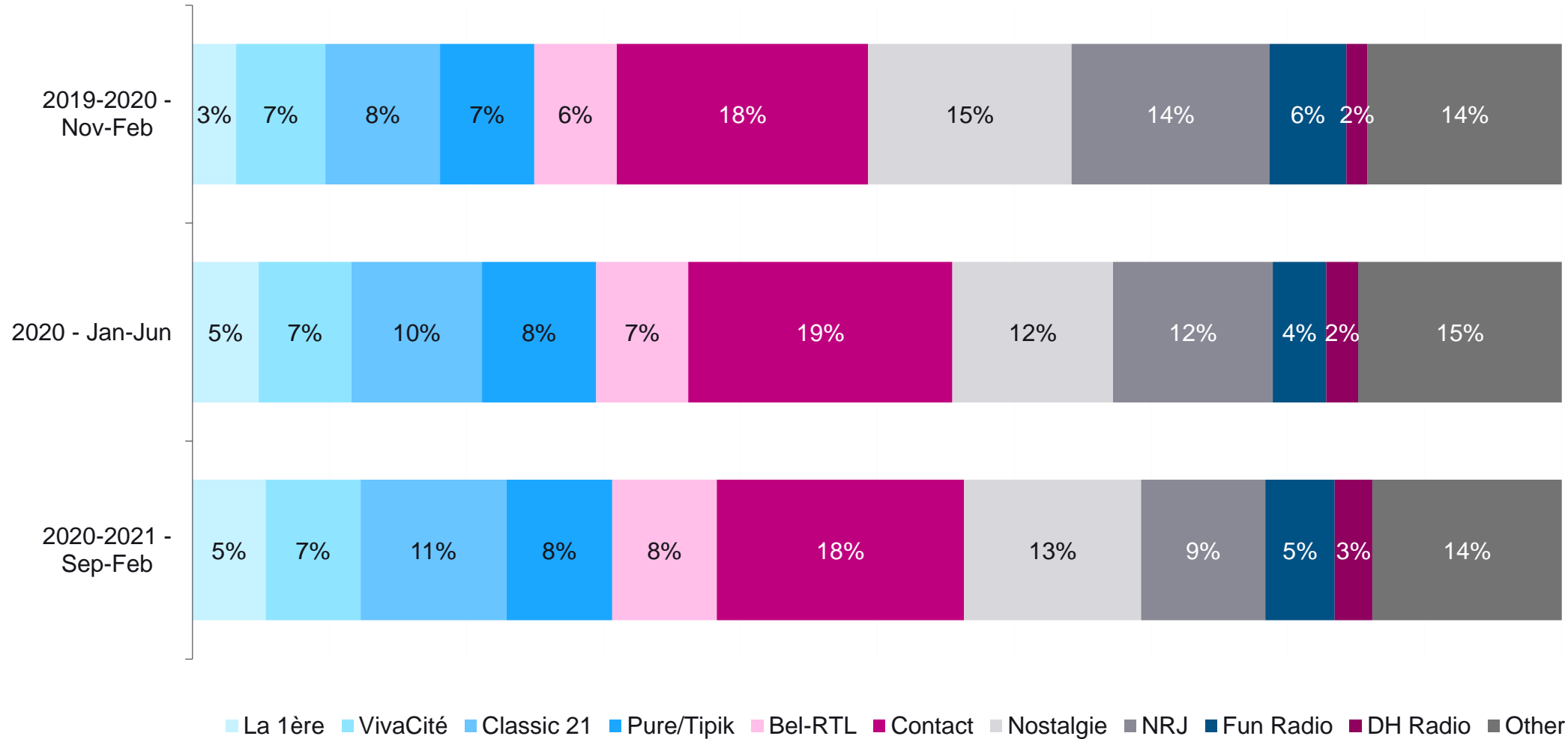
KEY RADIO FIGURES SOUTH

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
Total North	799.462	↓ 98	20%	↑ 119	Total South	310.028	→ 100	30%	↑ 138

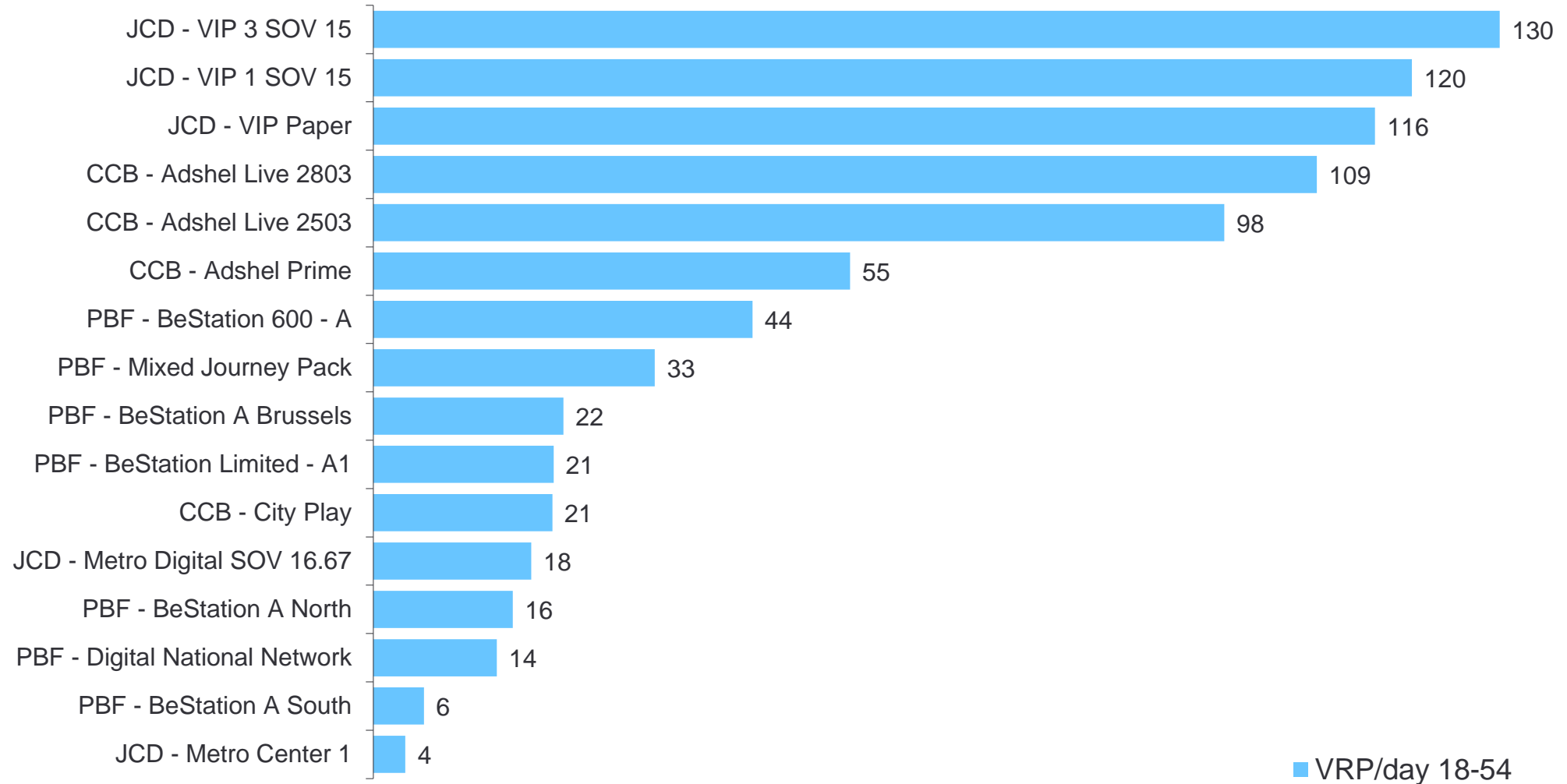
Key Print Figures - Magazines Circulation - Year 2020 (Paid + Free - digital sales included)

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
TOTAL	1.160.405	↓ 96	720.580	↓ 93	569.995	↑ 101	2.450.980	↓ 96



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

