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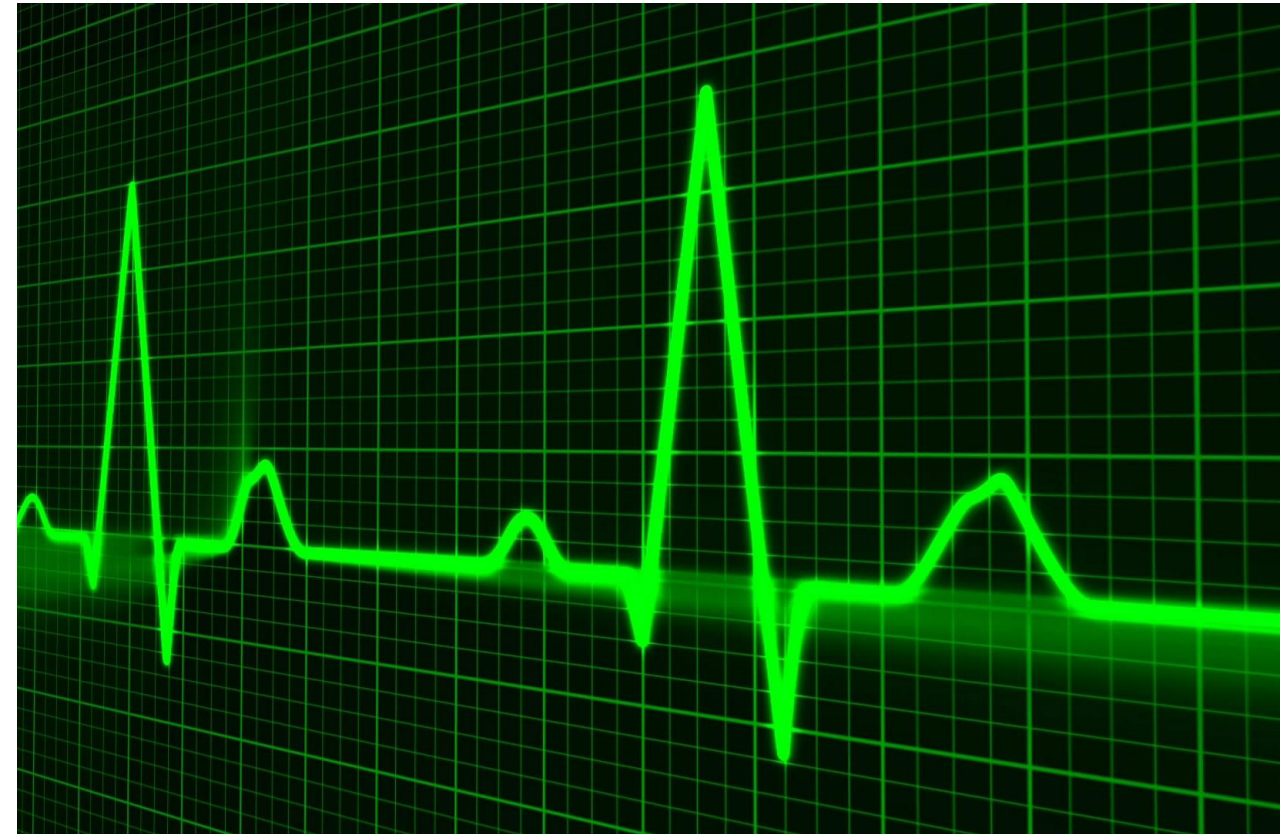
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

April 2020



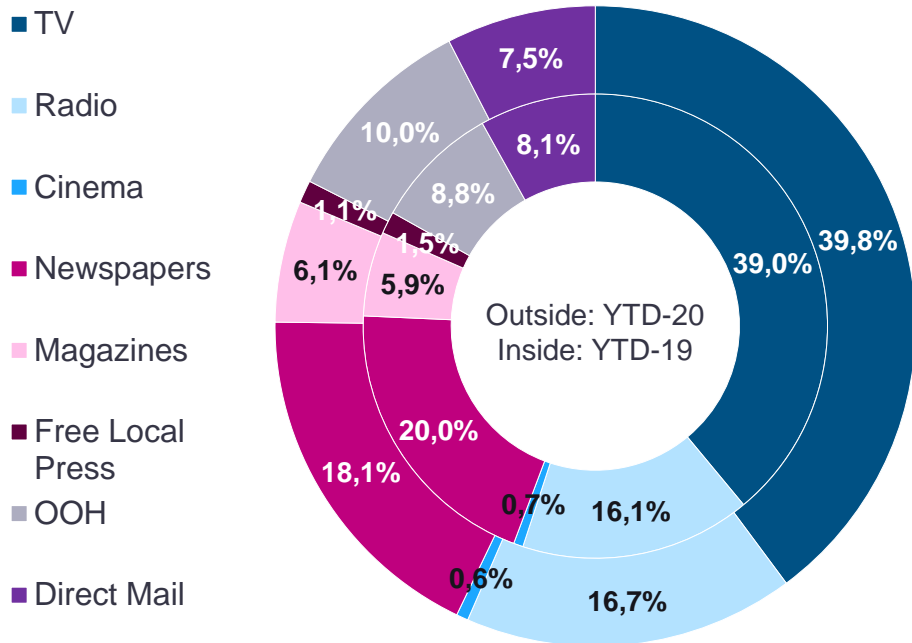
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Mar 2020

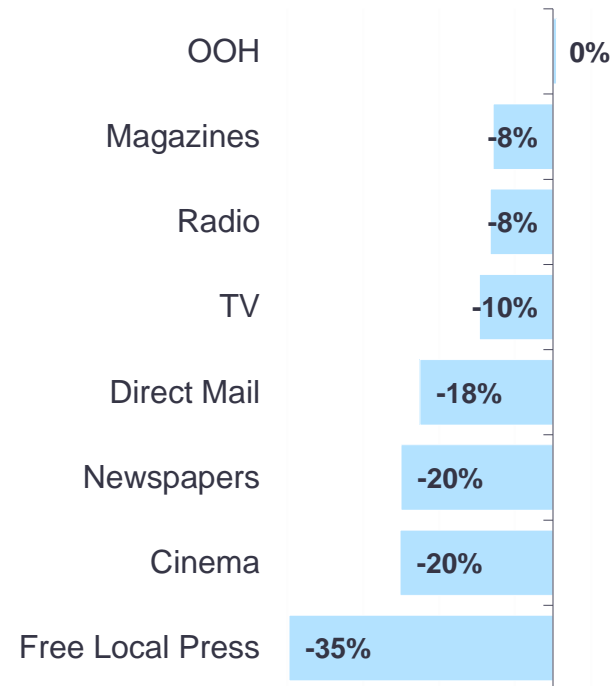
NB : No Internet figures in MDB for 2019 & 2020

Market	National	North	South
<ul style="list-style-type: none"> ■ € Mo ■ vs YTD-19 ■ % Region 	769,6 - 11,6% 100%	459,4 - 12,3% 60%	310,2 - 10,7% 40%

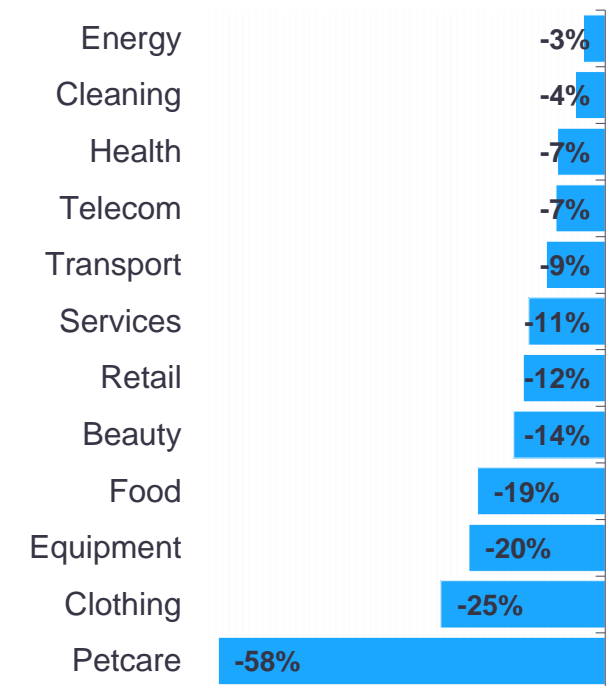
Media Mix Evol.



Media Evol. (vs YTD-19)



EcoGroups Evol. (vs YTD-19)



MDB TOP 30 ADVERTISERS - Jan-Mar 2020

NB : No Internet figures in MDB for 2019 & 2020

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
1	PROCTER & GAMBLE	22,3	↓ 98
2	COLRUYT GROUP	21,3	↓ 91
3	D'IETEREN GROUP	20,1	↓ 83
4	PSA GROUPE	15,0	↓ 84
5	RENAULT-NISSAN ALLIANCE	11,8	↑ 130
6	AHOLD DELHAIZE	11,2	↔ 99
7	ORANGE	8,5	↑ 142
8	ALDI	8,5	↑ 244
9	TELENET GROUP HOLDING	7,7	↓ 82
10	THE COCA-COLA COMPANY	7,0	↓ 78
11	PROXIMUS GROUP	7,0	↓ 55
12	RECKITT & BENCKISER	6,9	↓ 67
13	LOTERIE NATIONALE	6,5	↑ 141
14	THE WALT DISNEY COMPANY	6,4	↓ 92
15	FERRERO	6,4	↑ 115

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
16	VINTED	6,3	↓ 78
17	UNILEVER	6,2	↓ 88
18	NETHYS	5,5	↑ 155
19	BEIERSDORF	5,3	↓ 95
20	FIAT CHRYSLER AUTOMOBILES	5,3	↓ 90
21	L'OREAL GROUP	5,0	↓ 79
22	MONDELEZ INTERNATIONAL	4,9	↓ 97
23	GROUPE 3 SUISSES	4,9	↓ 97
24	AXA GROUP	4,9	↑ 253
25	CARREFOUR GROUP	4,8	↓ 66
26	BMW GROUP BELGIUM	4,5	↑ 113
27	PERRIGO	4,4	↓ 94
28	KBC GROUP	4,3	↔ 101
29	BELFIUS	4,2	↓ 68
30	ING GROUP	4,1	↑ 129



Key TV figures

Key TV figures North - Apr-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Apr-20	YTD	Apr-20	YTD	Apr-20	YTD
VTM	PRP 18-54	9,0	8,1	27,1	26,3	875	724
Q2	PRP 18-44	2,0	1,8	7,0	6,8	793	707
VITAYA	PRP 18-54	1,4	1,3	4,1	4,3	697	530
CAZ	MEN 18-54	0,5	0,5	1,8	2,0	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	4,8	3,6	14,6	11,6	786	857
VIJF	PRP 18-54	1,8	1,8	5,5	5,7	670	672
ZES	PRP 18-54	0,7	0,6	2,0	2,0	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	33,2	30,7				
Total TV	PRP 18-44	29,0	26,7				
Total TV	MEN 18-54	27,0	25,3				

Key TV indexes North - Apr-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	
		Apr-20	YTD	Apr-20	YTD	Apr-20	YTD
VTM	PRP 18-54	↑ 146	↑ 113	↑ 116	↑ 105	✓ 86	✓ 90
Q2	PRP 18-44	↑ 123	↓ 97	↓ 96	↓ 93	✓ 87	✓ 96
VITAYA	PRP 18-54	↑ 120	↘ 99	↓ 96	↓ 92	✓ 83	✓ 80
CAZ	MEN 18-54	↑ 107	→ 100	↓ 85	↓ 94	Package	Package
VIER	PRP 18-54	↑ 121	↓ 98	↓ 96	↓ 92	✓ 71	✓ 96
VIJF	PRP 18-54	↑ 114	↑ 104	↓ 91	↓ 97	✓ 73	✓ 91
ZES	PRP 18-54	↑ 135	↑ 103	↑ 109	↓ 96	Package	Package
Total TV	PRP 18-54	↑ 126	↑ 107				
Total TV	PRP 18-44	↑ 127	↑ 105				
Total TV	MEN 18-54	↑ 125	↑ 107				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Apr - 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	30,8%	31,0%	30,1%	33,8%	112
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	86,3%	84,0%	82,4%	80,4%	98
	VHS + DVD player + Blu-Ray	"	4,0%	3,5%	2,4%	2,1%	88
	Video on demand + Digital recorder	"	8,5%	11,0%	13,6%	16,0%	118
	Game console and other devices (3)	"	1,2%	1,5%	1,6%	1,5%	91
% Time shift viewing (4)	All Channels	"	25,1%	26,2%	30,6%	32,9%	107
	Main Channels (5)	"	28,2%	29,9%	34,3%	37,0%	108
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	87	87	88	86	
	Main channels (5) - TSV	"	30	35	35	35	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	114	112	101	109	108
	All TV channels (TSV)	"	32	33	35	42	117
	All TV channels (Live + TSV)	"	146	145	136	151	111
	Other TV Screen Usage	"	31	36	38	48	126
	Total TV Screen Usage	"	177	181	175	199	114

Key TV figures South - Apr-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Apr-20	YTD	Apr-20	YTD	Apr-20	YTD
RTL-TVI	PRP 18-54	9,6	7,8	30,4	27,3	594	642
Club-RTL	MEN 18-54	1,0	1,1	4,1	5,4	1.498	975
Plug-RTL	ALL 15-34	0,7	0,7	3,7	4,4	796	601
TF1	PRP 18-54	3,9	3,6	12,4	12,6	479	490
La Une	PRP 18-54	5,3	4,5	16,6	15,9	590	595
La Deux	PRP 18-54	1,7	1,6	5,3	5,5	524	536
AB3	PRP 18-44	1,7	1,9	6,2	7,7	775	726
TTV	PRP 18-54	31,8	28,5				
TTV	PRP 18-44	28,1	24,8				
TTV	ALL 15-34	18,3	16,5				
TTV	MEN 18-54	23,2	20,9				

Key TV indexes South - Apr-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	
		Apr-20	YTD	Apr-20	YTD	Apr-20	YTD
RTL-TV1	PRP 18-54	↑ 141	↔ 101	↑ 116	↔ 100	✓ 64	✓ 82
Club-RTL	MEN 18-54	↓ 64	↓ 76	↓ 53	↓ 78	✗ 143	✗ 112
Plug-RTL	ALL 15-34	↑ 113	↑ 112	↓ 89	↑ 111	✓ 89	✓ 78
TF1	PRP 18-54	↑ 134	↑ 111	↑ 110	↑ 110	✓ 61	✓ 74
La Une	PRP 18-54	↑ 146	↑ 117	↑ 120	↑ 116	✓ 75	✓ 90
La Deux	PRP 18-54	↑ 144	↑ 121	↑ 119	↑ 120	✓ 72	✓ 86
AB3	PRP 18-44	↓ 59	↓ 65	↓ 46	↓ 64	✗ 102	✗ 113
TTV	PRP 18-54	↑ 122	↔ 101				
TTV	PRP 18-44	↑ 128	↑ 102				
TTV	ALL 15-34	↑ 127	↔ 101				
TTV	MEN 18-54	↑ 121	↓ 97				

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Apr - 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	35,0%	34,0%	33,2%	36,5%	110
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	78,7%	76,0%	74,2%	68,3%	92
	VHS + DVD player + Blu-Ray	"	7,3%	6,7%	5,3%	3,7%	70
	Video on demand + Digital recorder	"	13,3%	16,5%	19,5%	26,8%	137
	Game console and other devices (3)	"	0,7%	0,8%	1,0%	1,2%	124
% Time shift viewing (4)	All Channels	"	17,9%	21,4%	22,0%	24,0%	109
	Main Channels (5)	"	19,6%	22,7%	22,5%	24,5%	109
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	89	87	88	87	
	Main channels (5) - TSV	"	50	51	52	50	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	151	137	132	128	97
	All TV channels (TSV)	"	28	30	30	33	112
	All TV channels (Live + TSV)	"	179	167	162	162	100
	Other TV Screen Usage	"	56	61	66	89	134
	Total TV Screen Usage	"	235	228	228	250	110



Top websites

Key Digital Figures - TOP WEBSITES

Warning:

Two studies, two methodologies.

CIM internet is a site-centric study measuring only Belgian sites.

Comscore is an international panel-based study.

Not to be compared !

CIM Unique Browser Definition:

Browser identified by a unique CIM cookie* appearing on the measured site.

* : A cookie is a small text file stored by a website on your computer to keep track of information about your browsing on that site

Key Digital Figures - TOP BELGIAN WEBSITES - Apr-20

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.980.058	11	Gazet van Antwerpen	360.310
2	Nieuwsblad	1.511.979	12	De Morgen	334.963
3	Sudinfo	748.656	13	La Libre.be	333.540
4	VRT	709.800	14	Immoweb	320.288
5	RTBF.be	658.309	15	Het Belang van Limburg	273.877
6	DH.be	533.492	16	Sudpresse Editions Digitales	250.830
7	RTL.be	524.305	17	Knack-Le Vif	233.159
8	De Standaard	481.136	18	L'Avenir.net	226.207
9	Le Soir	449.264	19	7sur7.be	193.635
10	2dehands.be-2ememain.be	384.678	20	Sporza	189.701

Key Digital Figures - TOP Non-CIM WEBSITES - Dec-17

NB: Comscore stopped measuring the Belgian market on December 31, 2017

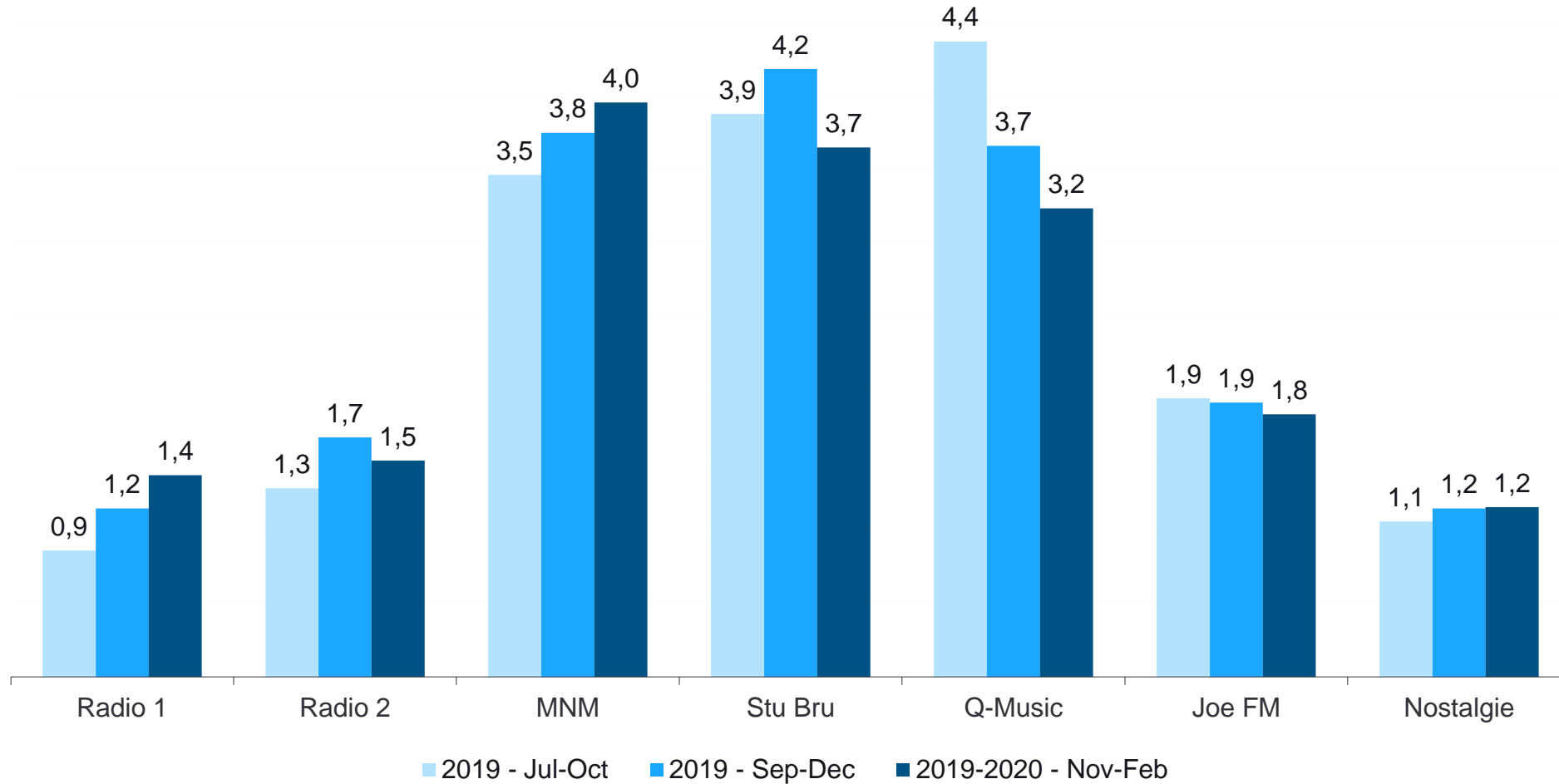
Website	Daily Visitors (000)
MSN.COM	1.022
GOOGLE.BE	1.012
MSN.BE	866
FACEBOOK.COM	657
LINKEDIN.COM	630
LIVE.COM	615
GOOGLE.COM	433
BING.COM	365
YOUTUBE.COM	327
YAHOO.COM	265



Key Radio figures

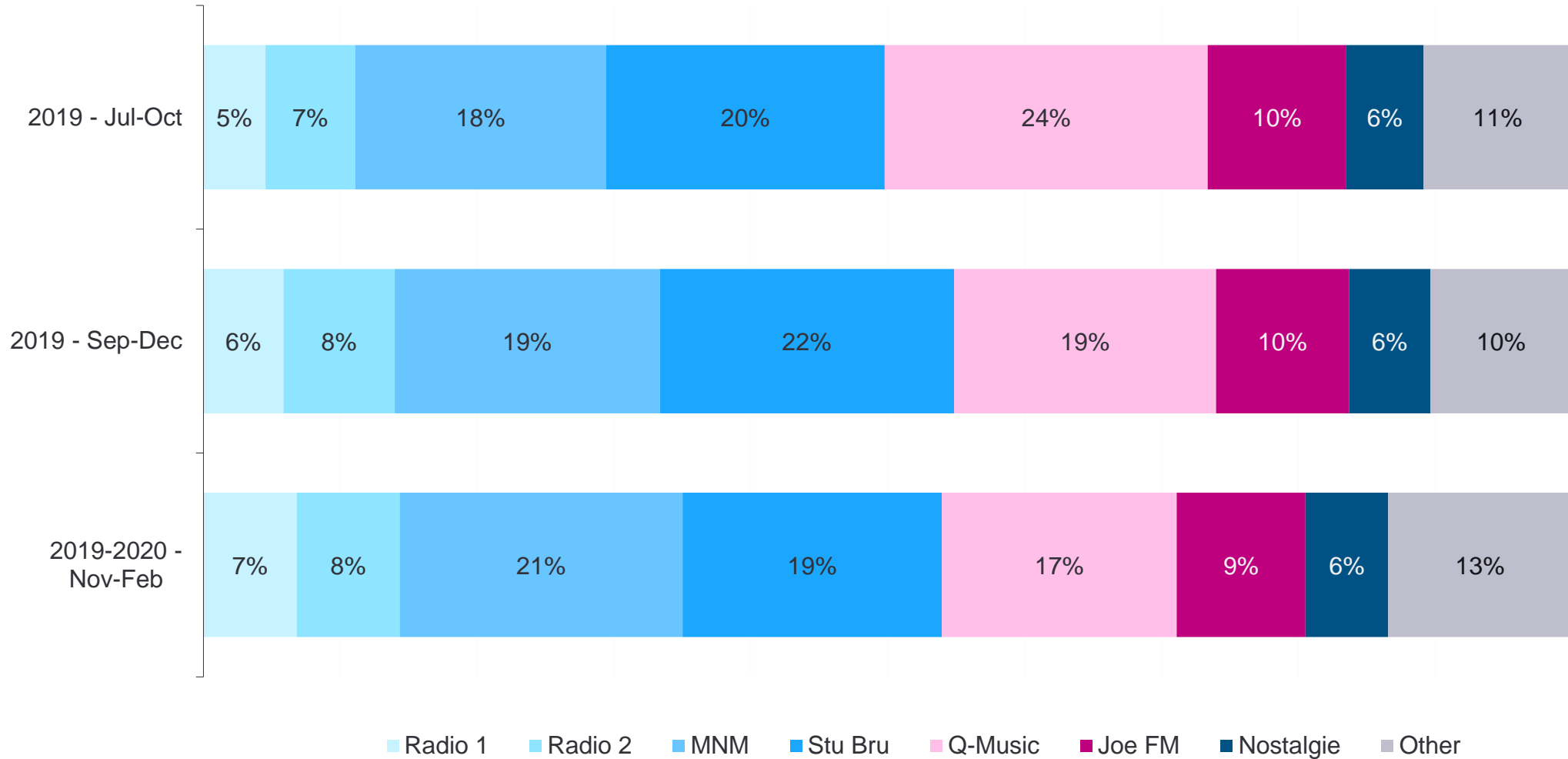
KEY RADIO FIGURES NORTH

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



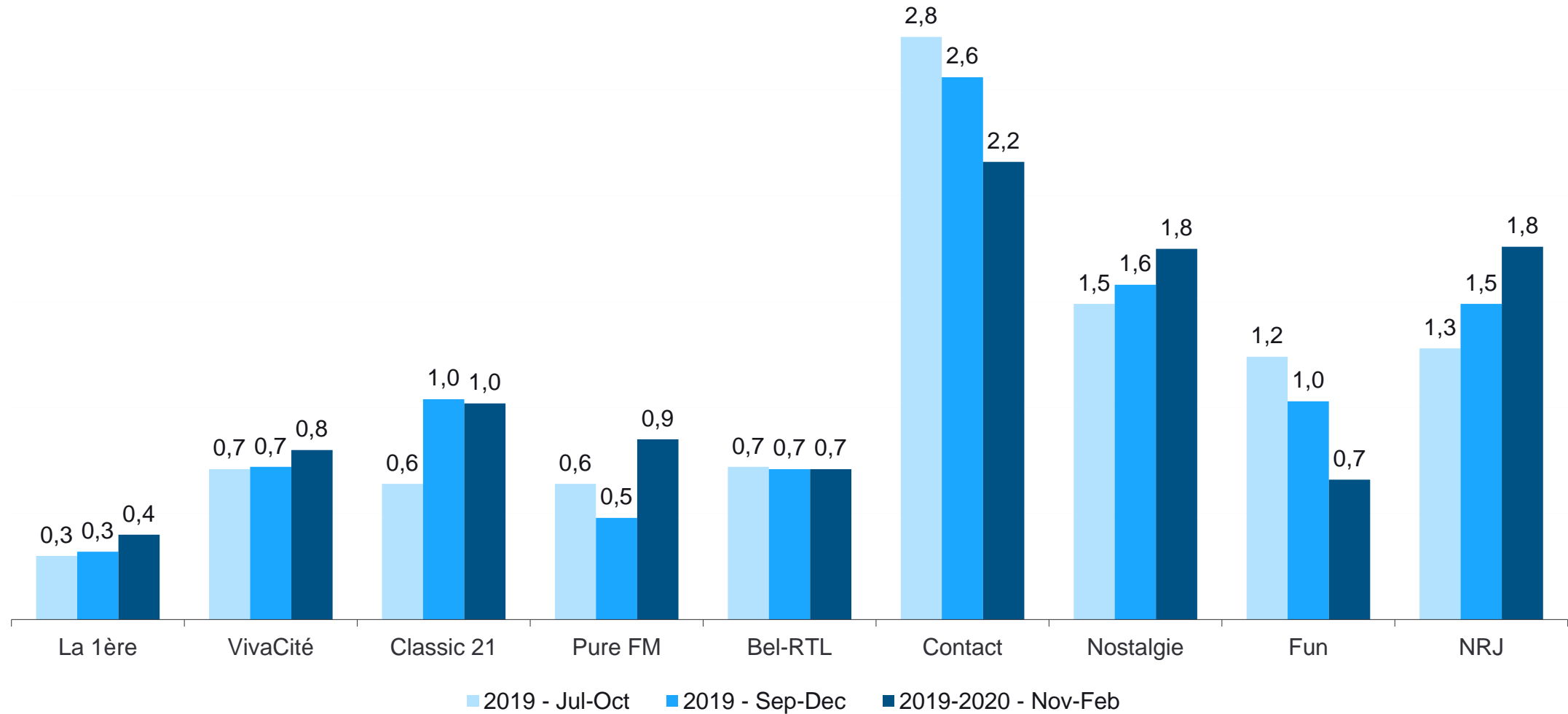
KEY RADIO FIGURES NORTH

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



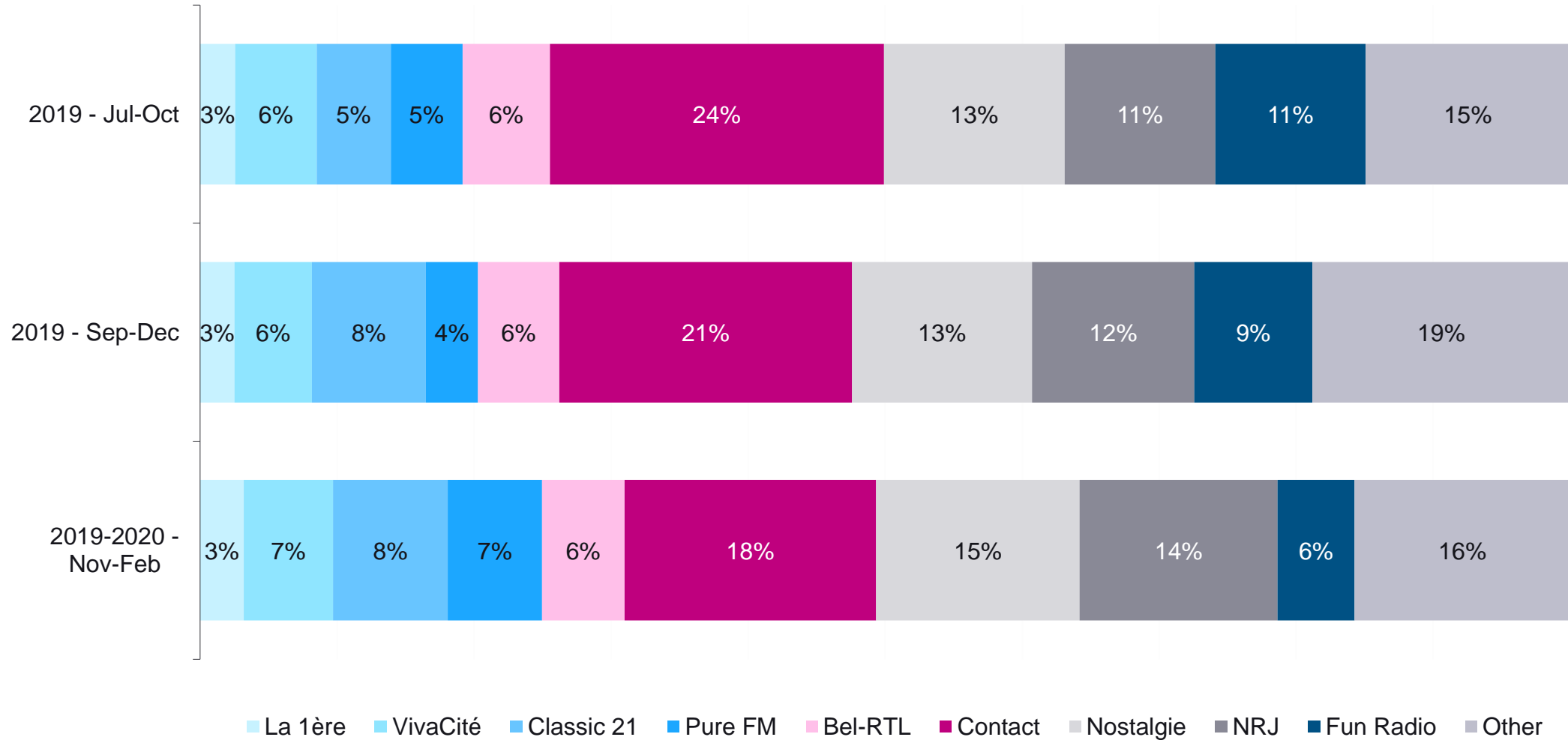
KEY RADIO FIGURES SOUTH

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

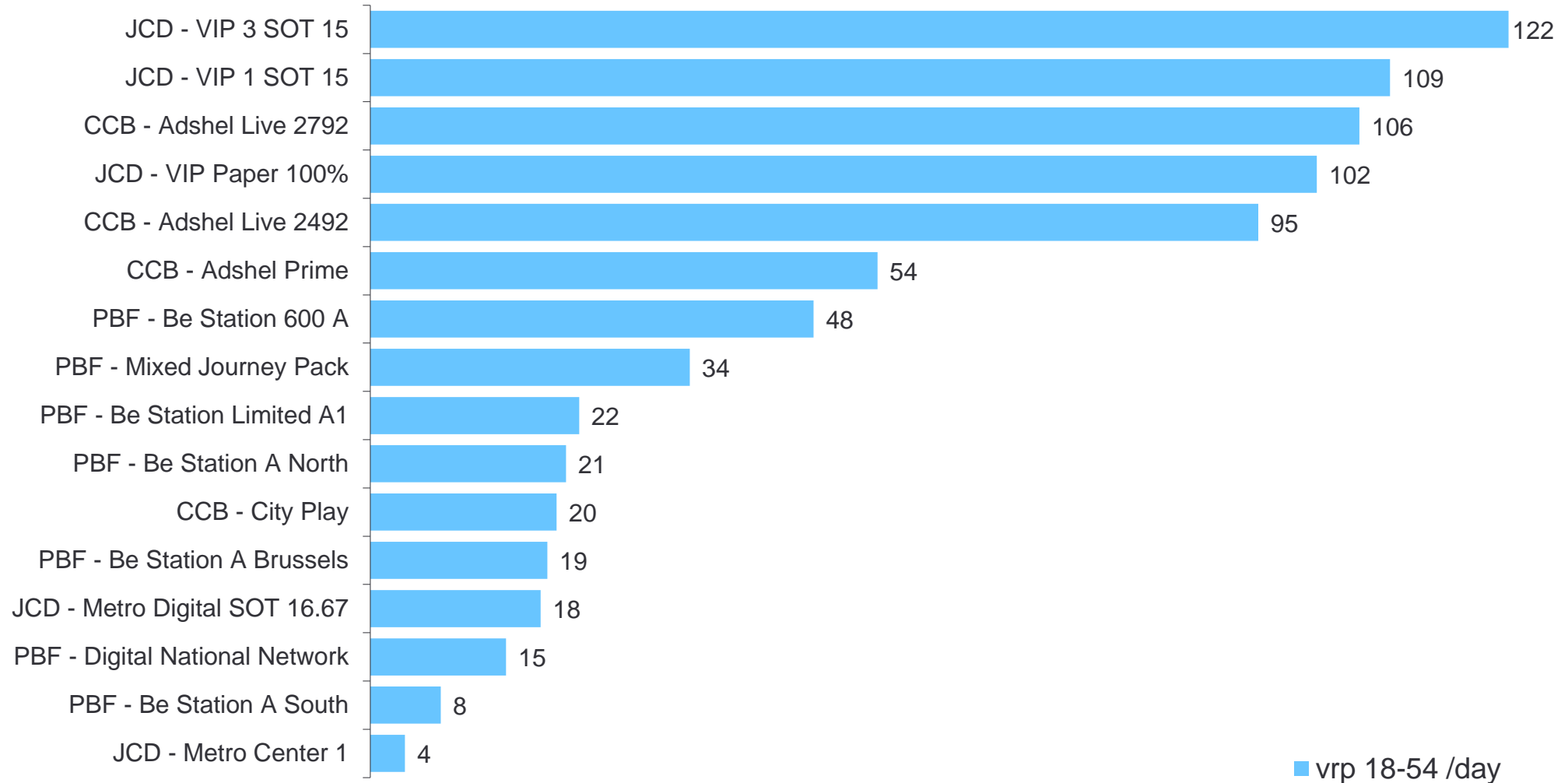
Key Print Figures - Magazines Circulation - Year 2019 (Paid + Free - digital sales included)

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



OOH Ratings - Panoramic & Classic billboards VRP's* per day (National) on ALL 18-54

