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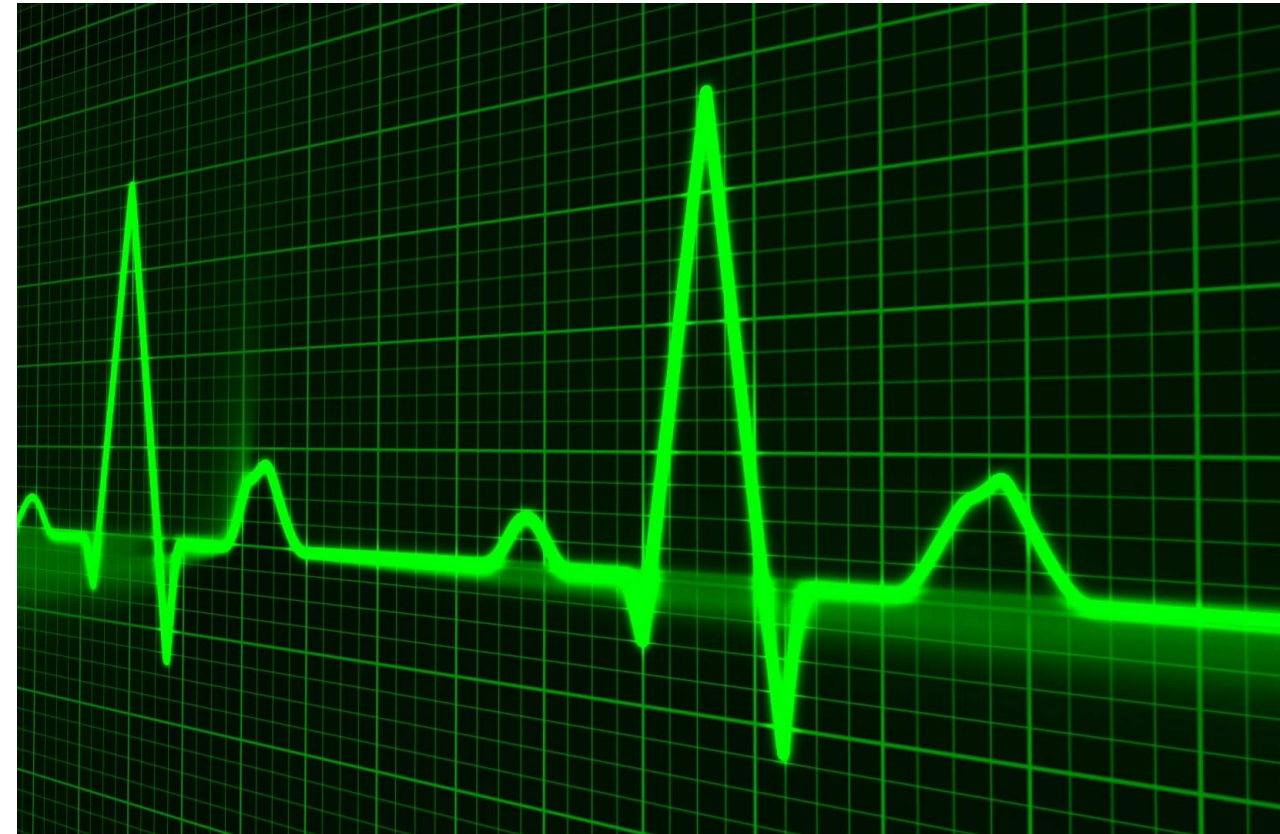
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

November 2021



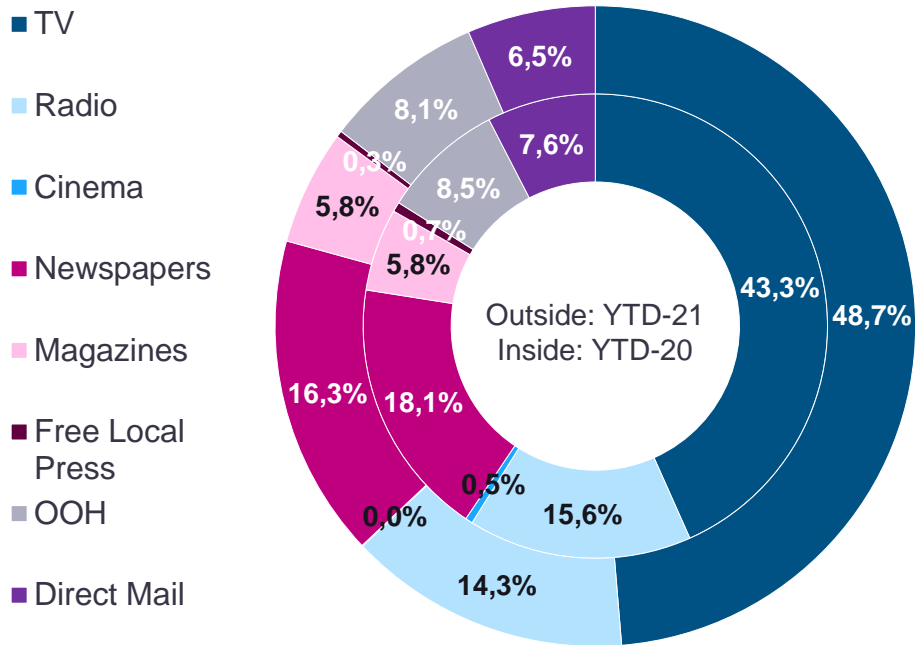
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Oct 2021

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

Market	National	North	South
<ul style="list-style-type: none"> € Mo vs YTD-20 % Region 	3.083,3 + 19,5% 100%	1.871,6 + 19,9% 61%	1.211,7 + 19,0% 39%

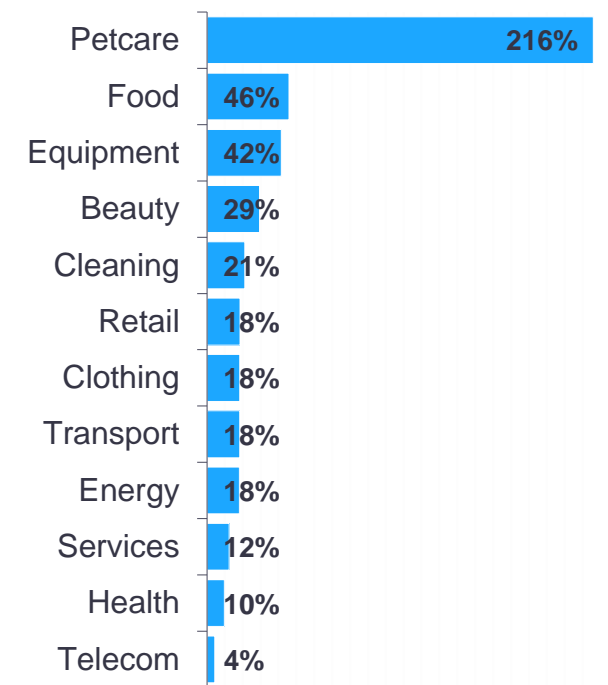
Media Mix Evol.



Media Evol. (vs YTD-20)



EcoGroups Evol. (vs YTD-20)



MDB TOP 30 ADVERTISERS - Jan-Oct 2021

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

Rank	ADV.GROUP	Gross Inv.	vs 2020
1	COLRUYT GROUP	121,2	↑ 117
2	PROCTER & GAMBLE	120,8	↑ 133
3	AHOLD DELHAIZE	75,0	↑ 141
4	THE COCA-COLA COMPANY	65,1	↑ 170
5	UNILEVER	49,6	↑ 147
6	D'IETEREN GROUP	49,4	↑ 182
7	RECKITT & BENCKISER	39,1	↑ 104
8	TELENET GROUP HOLDING	35,5	↑ 110
9	PROXIMUS GROUP	30,1	↑ 109
10	L'OREAL GROUP	28,8	↑ 153
11	FERRERO	27,9	↑ 146
12	LOTERIE NATIONALE	27,2	↑ 119
13	ALDI	24,6	↓ 89
14	AS WATSON	24,6	↑ 128
15	ORANGE	24,2	↓ 98

Rank	ADV.GROUP	Gross Inv.	vs 2020
16	RENAULT-NISSAN ALLIANCE	24,0	↑ 110
17	NESTLE GROUP	24,0	↑ 121
18	NETHYS	23,6	↑ 113
19	BMW GROUP	23,0	↑ 151
20	LIDL & CO	21,5	↑ 110
21	CARREFOUR GROUP	21,2	↓ 92
22	VINTED	20,8	↑ 115
23	BEIERSDORF	20,5	↑ 124
24	MONDELEZ INTERNATIONAL	19,3	↑ 119
25	COOLBLUE	19,0	↑ 208
26	GROUPE 3 SUISES	18,6	↑ 107
27	PSA GROUPE	18,5	↓ 74
28	HELLOFRESH	18,4	↑ 174
29	PEPSICO	16,8	↓ 86
30	AXA GROUP	16,2	↑ 107



Key TV figures

Key TV figures North - Nov-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Nov-21	YTD-21	Nov-21	YTD-21	Nov-21	YTD-21
VTM	PRP 18-54	7,5	6,0	27,3	25,0	38,2	350,1
VTM2	PRP 18-54	1,8	1,4	6,7	6,0	11,5	92,2
VTM3	PRP 18-54	0,8	0,9	3,0	3,5	6,9	53,5
VTM4	MEN 18-54	0,8	0,6	3,6	2,9	3,3	33,2
Play4	PRP 18-54	4,2	2,8	15,2	11,7	22,1	169,6
Play5	PRP 18-54	1,0	1,0	3,7	4,3	5,2	60,1
Play6	PRP 18-54	0,6	0,6	2,2	2,3	4,2	38,7
Total TV	PRP 18-54	27,6	24,0				
Total TV	MEN 18-54	22,8	19,8				

Key TV indexes North - Nov-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	
		Nov-21	YTD-21	Nov-21	YTD-21	Nov-21	YTD-21
VTM	PRP 18-54	↓ 84	↓ 83	↗ 101	↓ 96	↑ 103	↑ 118
VTM2	PRP 18-54	↓ 98	↓ 83	↑ 118	↓ 95	↑ 140	↑ 148
VTM3	PRP 18-54	↓ 66	↓ 74	↓ 79	↓ 85	↑ 142	↑ 138
VTM4	MEN 18-54	↑ 151	↑ 105	↑ 179	↑ 121	↑ 168	↑ 181
Play4	PRP 18-54	↓ 86	↓ 87	↑ 103	→ 100	↘ 99	↑ 117
Play5	PRP 18-54	↓ 94	↓ 71	↑ 112	↓ 82	↓ 83	↑ 106
Play6	PRP 18-54	↓ 91	↓ 93	↑ 109	↑ 106	↑ 106	↑ 136
Total TV	PRP 18-54	↓ 83	↓ 87				
Total TV	MEN 18-54	↓ 84	↓ 87				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Nov - 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	28,1%	28,0%	30,9%	28,6%	93
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	83,0%	81,4%	79,0%	73,1%	92
	VHS + DVD player + Blu-Ray	"	3,5%	2,4%	2,3%	1,3%	53
	Video on demand + Digital recorder	"	11,9%	14,5%	17,3%	24,4%	141
	Game console and other devices (3)	"	1,6%	1,7%	1,4%	1,0%	76
% Time shift viewing (4)	All Channels	"	25,9%	29,2%	32,5%	34,2%	105
	Main Channels (5)	"	30,3%	33,3%	36,5%	39,3%	108
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	86	85	84	80	
	Main channels (5) - TSV	"	33	34	36	35	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	102	96	98	81	82
	All TV channels (TSV)	"	30	32	37	34	92
	All TV channels (Live + TSV)	"	132	127	136	115	85
	Other TV Screen Usage	"	36	38	47	54	114
	Total TV Screen Usage	"	167	165	183	169	92

Key TV figures South - Nov-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Nov-21	YTD-21	Nov-21	YTD-21	Nov-21	YTD-21
RTL-TVI	PRP 18-54	6,5	5,5	26,8	24,9	31,2	252,7
Club-RTL	MEN 18-54	0,9	1,0	5,0	5,8	4,6	37,0
Plug-RTL	ALL 15-34	0,6	0,5	4,8	4,3	2,3	20,8
TF1	PRP 18-54	3,2	2,8	13,2	12,5	7,0	59,8
La Une	PRP 18-54	3,4	3,7	14,2	16,7	11,5	101,8
Tipik	PRP 18-54	1,3	1,5	5,4	6,7	3,2	33,9
AB3	PRP 18-44	1,4	1,2	6,7	6,7	3,5	26,4
TTV	PRP 18-54	24,1	22,1				
TTV	PRP 18-44	20,3	18,1				
TTV	ALL 15-34	12,3	11,7				
TTV	MEN 18-54	17,6	16,9				

Key TV indexes South - Nov-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	
		Nov-21	YTD-21	Nov-21	YTD-21	Nov-21	YTD-21
RTL-TV1	PRP 18-54	↓ 77	↓ 79	↓ 93	↓ 92	↑ 104	↑ 120
Club-RTL	MEN 18-54	↓ 77	↓ 98	↓ 96	↑ 109	↓ 98	↑ 103
Plug-RTL	ALL 15-34	↓ 89	↓ 79	↑ 118	↔ 99	↓ 98	↑ 138
TF1	PRP 18-54	↓ 78	↓ 83	↓ 94	↓ 96	↑ 119	↑ 161
La Une	PRP 18-54	↓ 81	↓ 94	↓ 97	↑ 109	↑ 107	↑ 129
Tipik	PRP 18-54	↓ 93	↑ 110	↑ 112	↑ 127	↔ 100	↑ 147
AB3	PRP 18-44	↓ 88	↓ 79	↔ 100	↓ 93	↓ 92	↓ 94
TTV	PRP 18-54	↓ 83	↓ 86				
TTV	PRP 18-44	↓ 88	↓ 85				
TTV	ALL 15-34	↓ 77	↓ 81				
TTV	MEN 18-54	↓ 80	↓ 90				

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Nov - 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	31,3%	31,0%	33,4%	30,6%	92
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	75,1%	71,6%	67,2%	63,5%	95
	VHS + DVD player + Blu-Ray	"	6,3%	4,8%	4,1%	2,1%	51
	Video on demand + Digital recorder	"	17,8%	22,3%	27,6%	33,8%	122
	Game console and other devices (3)	"	0,8%	1,3%	1,2%	0,6%	49
% Time shift viewing (4)	All Channels	"	20,3%	21,9%	24,2%	26,1%	108
	Main Channels (5)	"	20,7%	22,5%	24,5%	26,6%	108
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	84	86	88	86	
	Main channels (5) - TSV	"	50	50	51	54	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	126	121	117	98	84
	All TV channels (TSV)	"	26	28	30	28	93
	All TV channels (Live + TSV)	"	152	148	147	126	86
	Other TV Screen Usage	"	59	68	85	84	99
	Total TV Screen Usage	"	212	216	232	211	91



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Nov-21

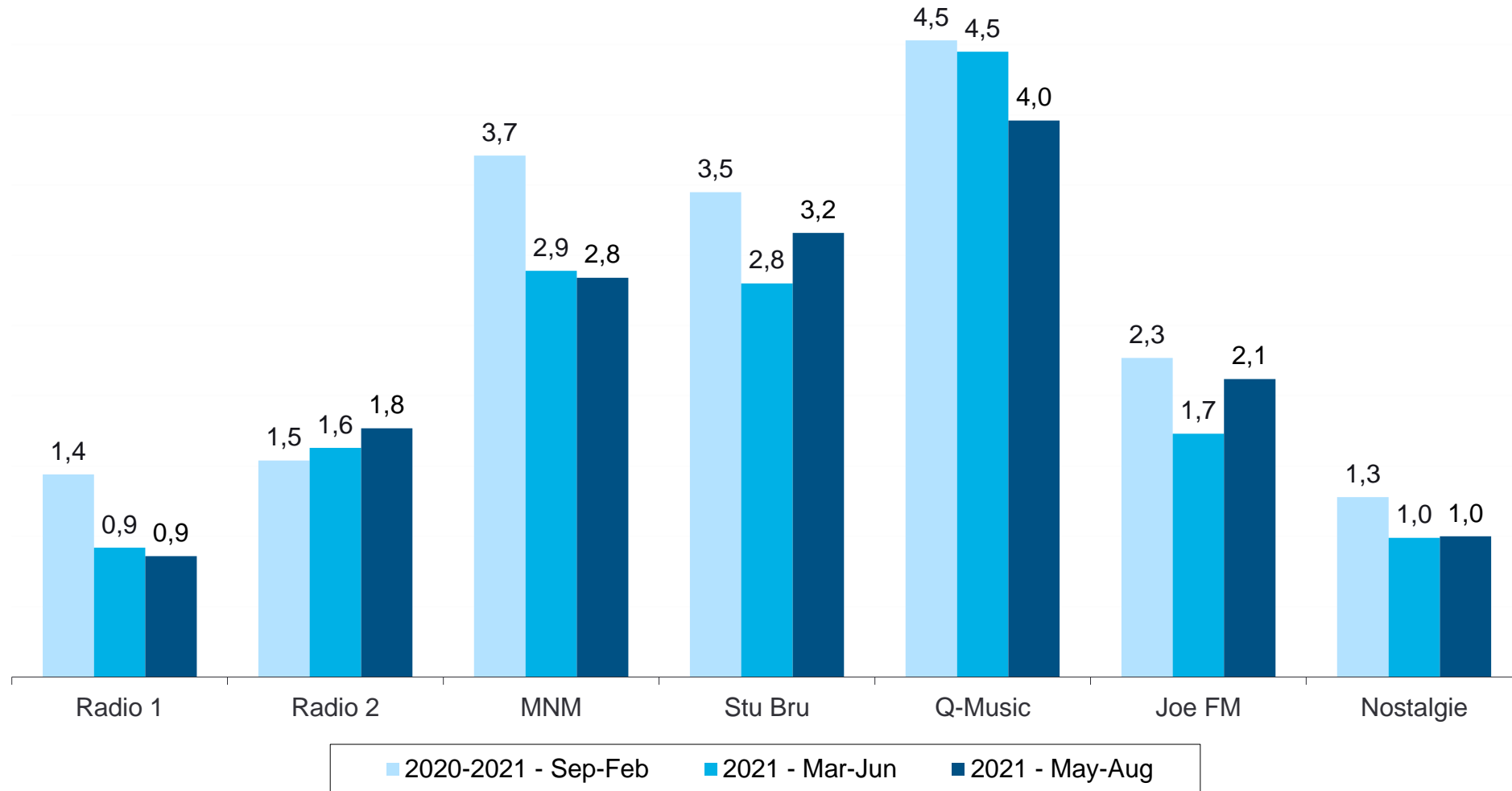
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	2.818.620	11	L'Avenir.net	1.465.296
2	Nieuwsblad	2.808.708	12	Immoweb	1.457.736
3	VRT	2.229.024	13	De Morgen	1.384.320
4	RTBF.be	2.038.092	14	Knack/Le Vif	1.343.160
5	Sudinfo	1.969.296	15	De Standaard	1.326.948
6	DH.be	1.928.304	16	La Libre.be	1.293.012
7	Le Soir	1.672.608	17	Flair	1.047.480
8	RTL.be	1.593.984	18	Sporza	1.000.440
9	2dehands.be/2ememain.be	1.580.460	19	Een	989.520
10	Gazet van Antwerpen	1.513.848	20	VTM	913.668



Key Radio figures

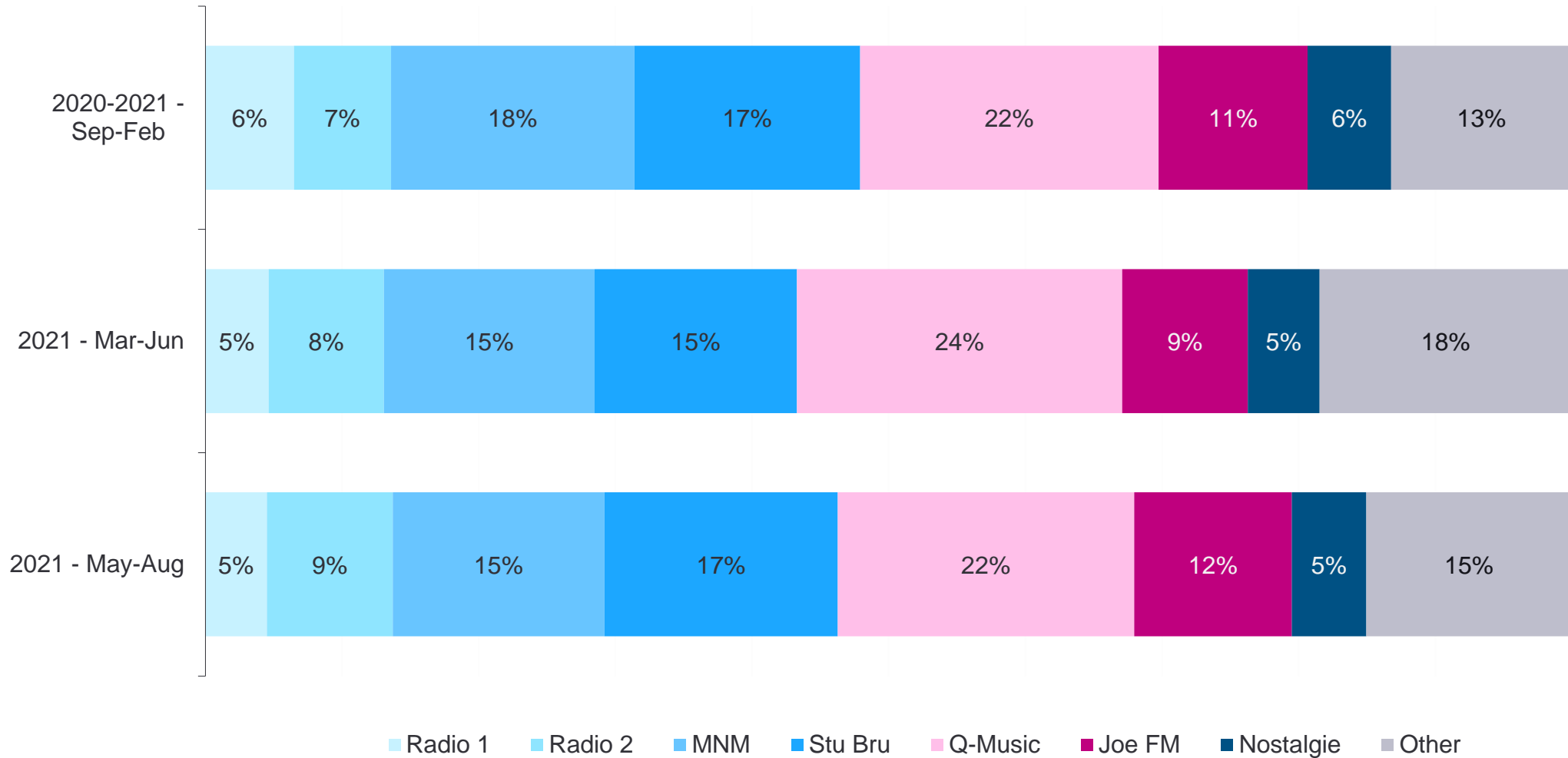
KEY RADIO FIGURES NORTH

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



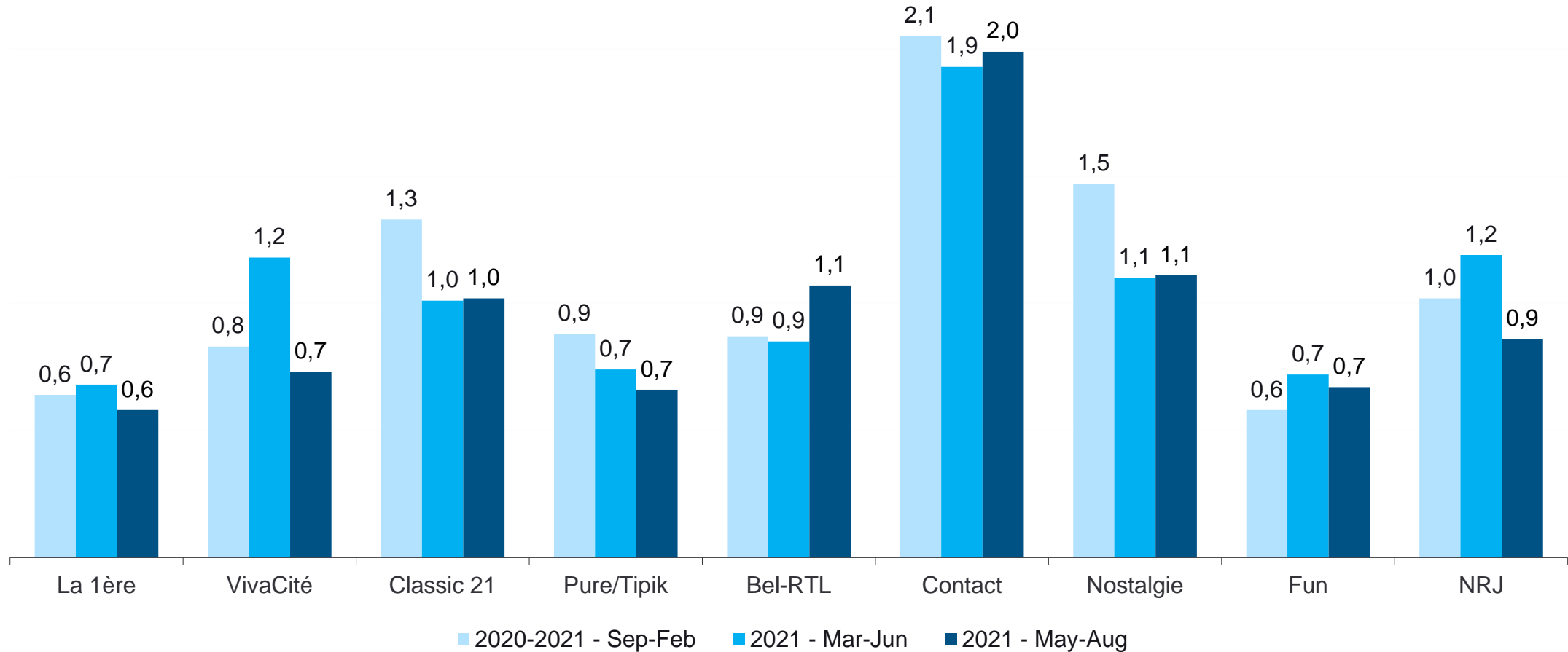
KEY RADIO FIGURES NORTH

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



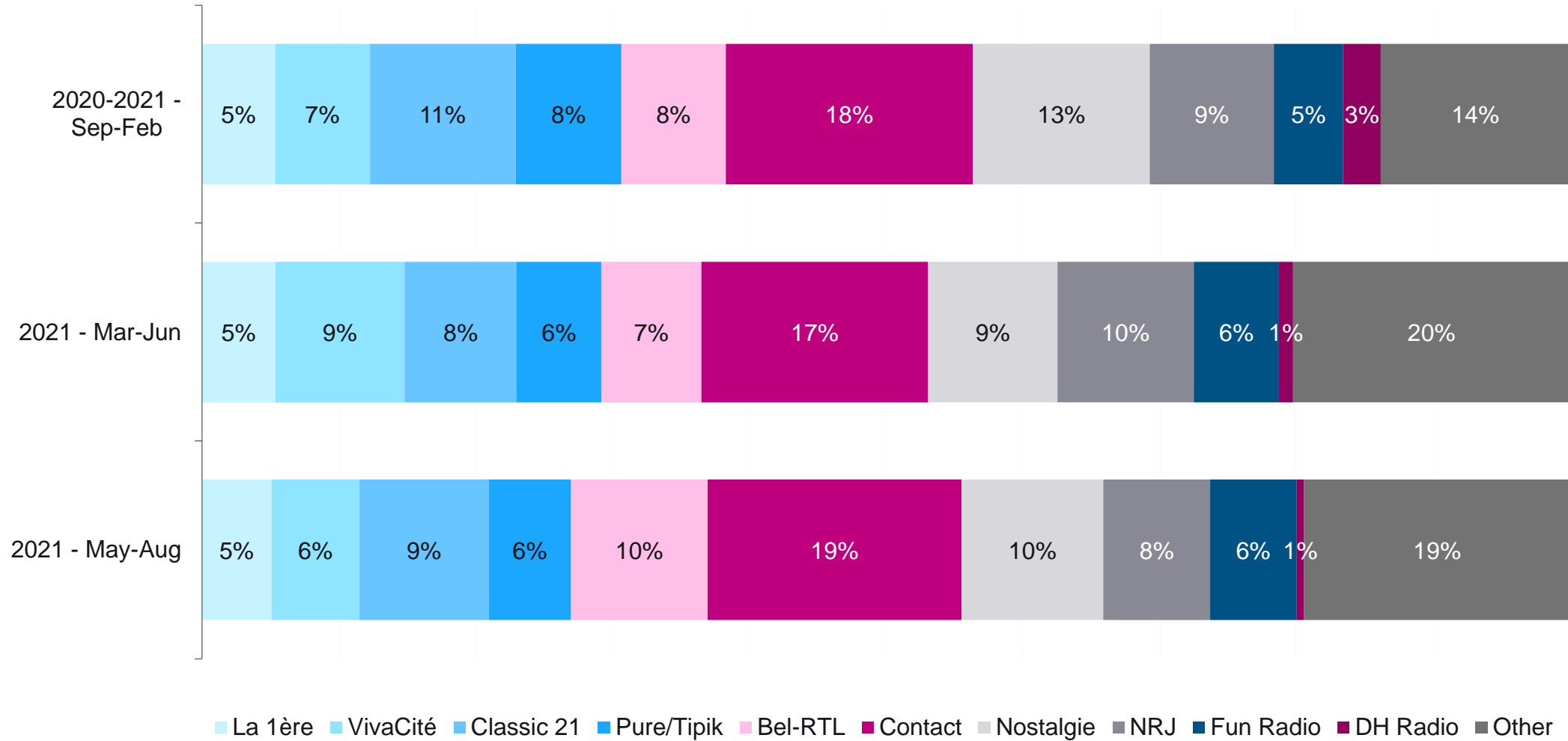
KEY RADIO FIGURES SOUTH

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
Het Laatste Nieuws/De Nieuwe Gazet	230.054	↓ 95	14%	↑ 126
Het Nieuwsblad/De Gentenaar	204.678	↓ 97	10%	↑ 116
De Standaard	110.868	↑ 106	36%	↑ 120
Het Belang van Limburg	84.900	↓ 98	12%	↑ 111
Gazet van Antwerpen	72.417	↓ 95	13%	↑ 109
De Tijd	49.927	↑ 109	51%	↑ 110
De Morgen	46.618	↓ 98	43%	↑ 109
Total North	799.462	↓ 98	20%	↑ 119

SOUTH	Circulation	vs 2019	Digital Part	vs 2019
Le Soir	73.761	↑ 120	55%	↑ 172
L'Avenir	69.092	↓ 92	9%	↓ 76
Sud Presse	69.052	↓ 94	21%	↑ 121
La Libre Belgique	40.644	↑ 108	38%	↑ 128
La DH	31.928	↓ 91	21%	↑ 124
L'Echo	16.795	↑ 101	53%	↑ 107
Grenz Echo	8.372	↓ 87	13%	↑ 165
Total South	309.644	→ 100	30%	↑ 138

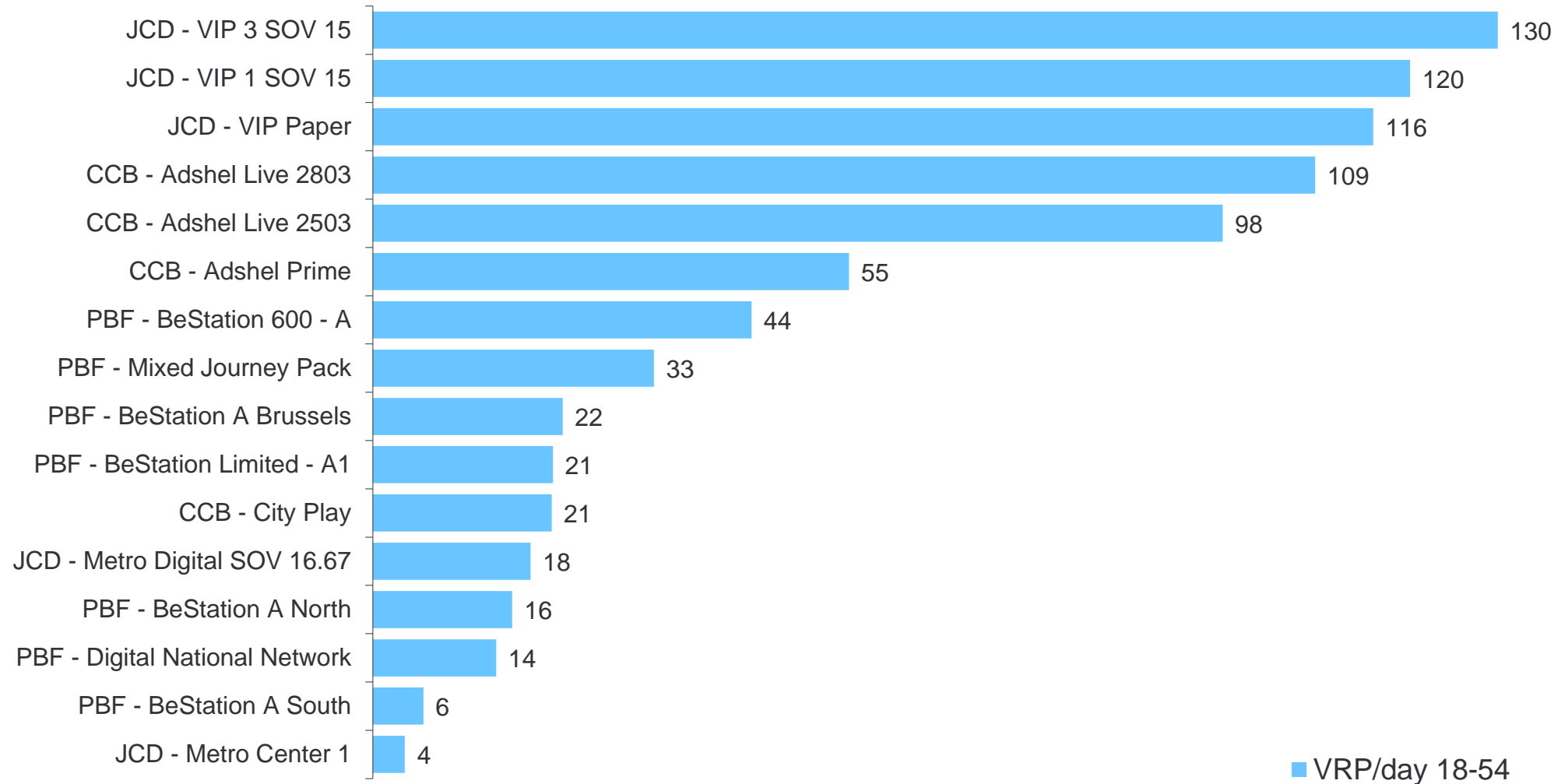
Key Print Figures - Magazines Circulation - Year 2020 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages		TOTAL	
	Circulation	vs 2019	Circulation	vs 2019	Circulation	vs 2019	Circulation	vs 2019
Television	572.452	↓ 96	346.403	↓ 93			918.855	↓ 95
Lifestyle Culture & Travel	113.691	↑ 106	68.246	↑ 102	364.594	↑ 109	546.531	↑ 108
Women	308.725	↓ 96	132.351	↓ 89			441.076	↓ 94
Business & News	103.170	↓ 98	128.115	↓ 97	43.472	↓ 85	274.757	↓ 95
Generation (Youth/Senior)			13.439	↓ 92	114.521	↓ 96	127.960	↓ 95
Build & Deco	44.518	↓ 93	21.572	↓ 81	28.154	→ 100	94.244	↓ 92
Men	23.296	↓ 81	11.925	↓ 80	30.620	↓ 98	65.841	↓ 88
TOTAL	1.165.852	↓ 97	722.051	↓ 93	581.361	↑ 103	2.469.264	↓ 97



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

