



space

CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

September 2022



Gross Media Investments Evolution

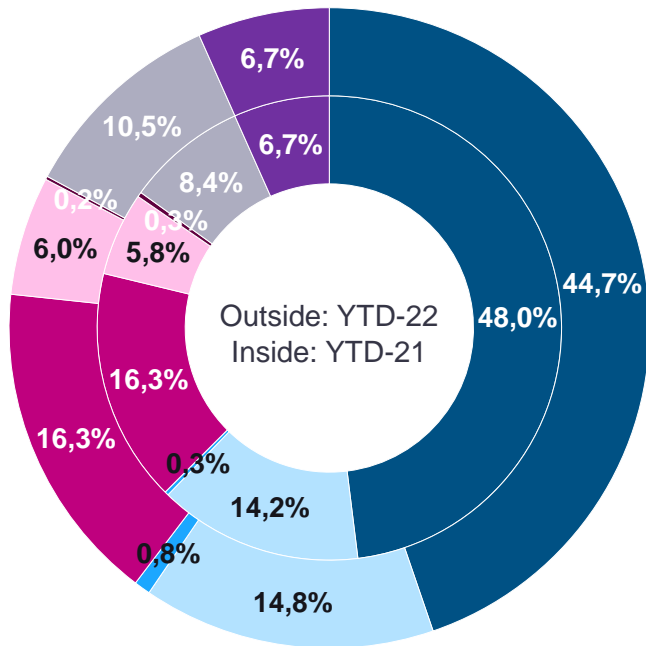
GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Aug 2022

NB : No Internet figures in MDB universe

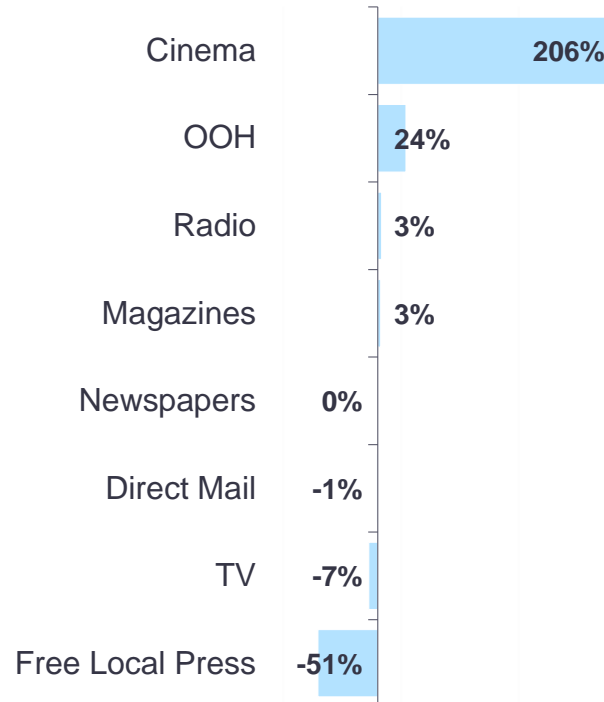
Market	National	North	South
<ul style="list-style-type: none"> ■ € Mo ■ vs YTD-21 ■ % Region 	2.252,8 - 0,6% 100%	1.390,7 - 0,4% 61,7%	862,2 - 2,2% 38,3%

Media Mix Evol.

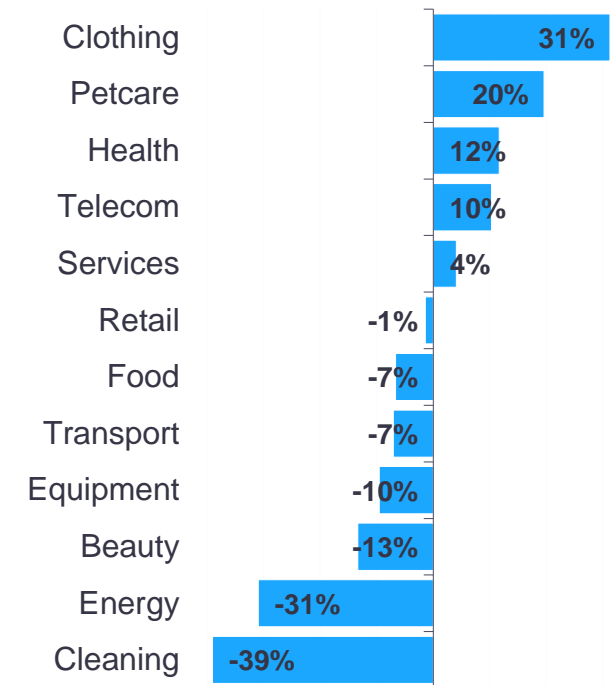
- TV
- Radio
- Cinema
- Newspapers
- Magazines
- Free Local Press
- OOH
- Direct Mail



Media Evol. (vs YTD-21)



EcoGroups Evol. (vs YTD-21)



MDB TOP 30 ADVERTISERS - Jan-Aug 2022

NB : No Internet figures in MDB universe

Rank	ADV.GROUP	Gross Inv.	vs 2021
1	COLRUYT GROUP	80,6	↓ 88
2	PROCTER & GAMBLE BENELUX	59,5	↓ 66
3	AHOLD DELHAIZE	48,8	↓ 94
4	THE COCA-COLA COMPANY	47,6	↓ 94
5	D'IETEREN GROUP	33,2	↓ 86
6	PROXIMUS GROUP	29,8	↑ 127
7	CARREFOUR GROUP	28,3	↑ 167
8	TELENET GROUP HOLDING	27,3	→ 100
9	UNILEVER	25,9	↓ 71
10	RECKITT & BENCKISER	25,4	↓ 85
11	STELLANTIS	24,1	↓ 87
12	ALDI	21,6	↑ 134
13	ORANGE	21,5	↑ 108
14	LOTERIE NATIONALE	21,2	↑ 110
15	AS WATSON	18,6	→ 100

Rank	ADV.GROUP	Gross Inv.	vs 2021
16	L'OREAL GROUP	18,5	↓ 91
17	BMW GROUP BELGIUM	16,7	→ 100
18	FERRERO	16,6	↓ 89
19	NETHYS	16,5	↓ 97
20	GROUPE 3 SUISES	16,1	↑ 114
21	THE WALT DISNEY COMPANY	14,9	↑ 148
22	RENAULT-NISSAN ALLIANCE	13,9	↓ 77
23	HENKEL	13,6	↓ 97
24	NESTLE GROUP	13,0	↓ 64
25	3I GROUP	12,7	↑ 199
26	MONDELEZ INTERNATIONAL	12,3	↓ 84
27	BNP-PARIBAS	12,2	↑ 186
28	BELFIUS	12,2	↑ 159
29	COOLBLUE	11,7	↓ 82
30	METRO GROUP	11,7	↑ 103

* : PSA + FCA



Key TV figures

Key TV figures North - Sep-22

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Sep-22	YTD-22	Sep-22	YTD-22	Sep-22	YTD-22
VTM	PRP 18-54	5,9	6,0	27,4	26,8	37,1	229,8
VTM2	PRP 18-54	1,4	1,4	6,5	6,2	8,9	54,4
VTM3	PRP 18-54	0,8	0,8	3,8	3,7	5,5	28,2
VTM4	MEN 18-54	0,6	0,5	3,1	2,7	3,6	27,4
Play4	PRP 18-54	2,8	2,4	12,9	10,6	19,5	108,7
Play5	PRP 18-54	0,8	0,9	3,8	3,8	7,8	45,2
Play6	PRP 18-54	0,4	0,4	1,7	2,0	9,2	48,3
Total TV	PRP 18-54	21,7	22,3				
Total TV	MEN 18-54	17,8	18,2				

Key TV indexes North - Sep-22

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	
		Sep-22	YTD-22	Sep-22	YTD-22	Sep-22	YTD-22
VTM	PRP 18-54	👉 99	👈 104	👈 102	👈 110	👇 96	👇 86
VTM2	PRP 18-54	👇 92	👉 100	👇 94	👈 106	👇 80	👇 80
VTM3	PRP 18-54	👈 115	👇 96	👈 120	👈 103	👈 115	👇 68
VTM4	MEN 18-54	👇 95	👇 94	👉 99	👉 99	👈 153	👈 110
Play4	PRP 18-54	👈 112	👇 90	👈 115	👇 95	👈 128	👇 89
Play5	PRP 18-54	👇 84	👇 83	👇 86	👇 89	👈 141	👇 94
Play6	PRP 18-54	👇 84	👇 79	👇 86	👇 84	👈 187	👈 168
Total TV	PRP 18-54	👇 97	👇 95				
Total TV	MEN 18-54	👇 96	👇 94				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Sep - Targetgroup: ALL 18-54

Source: CIM TV - Live +7 including guests

Variable	Channel	Daypart	YTD-19	YTD-20	YTD-21	YTD-22	22 vs 21
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	27,3%	29,9%	28,2%	26,8%	95
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	81,2%	79,0%	73,0%	71,5%	98
	Video on demand + Digital recorder	"	14,6%	17,2%	24,2%	27,9%	115
% Time shift viewing (4)	All Channels	"	29,0%	32,5%	33,2%	36,4%	110
	Main Channels (5)	"	32,9%	36,3%	38,1%	41,5%	109
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	85	85	79	82	
	Main channels (5) - TSV	"	35	36	36	41	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	94	96	81	73	90
	All TV channels (TSV)	"	31	36	33	32	98
	All TV channels (Live + TSV)	"	125	132	114	105	93
	Other TV Screen Usage	"	37	46	53	53	100
	Total TV Screen Usage	"	162	178	167	159	95

Key TV figures South - Sep-22

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Sep-22	YTD-22	Sep-22	YTD-22	Sep-22	YTD-22
RTL-TVI	PRP 18-54	4,7	4,8	25,6	25,1	23,9	156,3
Club-RTL	MEN 18-54	0,9	0,9	6,4	6,1	3,3	22,6
Plug-RTL	ALL 15-34	0,4	0,5	4,9	5,0	2,1	14,4
TF1	PRP 18-54	2,3	2,3	12,3	11,9	6,3	41,8
La Une	PRP 18-54	2,6	2,8	14,2	14,3	10,4	69,6
Tipik	PRP 18-54	0,9	1,0	4,6	5,1	2,5	18,0
AB3	PRP 18-44	1,1	1,0	7,6	6,5	3,3	20,0
TTV	PRP 18-54	18,5	19,3				
TTV	PRP 18-44	14,6	15,7				
TTV	ALL 15-34	8,4	9,4				
TTV	MEN 18-54	14,0	14,5				

Key TV indexes South - Sep-22

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	
		Sep-22	YTD-22	Sep-22	YTD-22	Sep-22	YTD-22
RTL-TVI	PRP 18-54	↑ 104	↓ 90	↑ 111	↑ 102	↓ 79	↓ 83
Club-RTL	MEN 18-54	↓ 77	↓ 90	↓ 84	↑ 105	↓ 75	↓ 82
Plug-RTL	ALL 15-34	↑ 105	↓ 94	↑ 126	↑ 118	↓ 82	↓ 92
TF1	PRP 18-54	↓ 87	↓ 86	↓ 92	↓ 97	↓ 74	↓ 94
La Une	PRP 18-54	↓ 82	↓ 73	↓ 87	↓ 83	↓ 84	↓ 90
Tipik	PRP 18-54	↓ 81	↓ 64	↓ 86	↓ 72	↓ 86	↓ 66
AB3	PRP 18-44	↓ 96	↓ 83	↑ 105	↓ 95	↑ 105	↑ 105
TTV	PRP 18-54	↓ 94	↓ 88				
TTV	PRP 18-44	↓ 91	↓ 88				
TTV	ALL 15-34	↓ 85	↓ 81				
TTV	MEN 18-54	↓ 94	↓ 86				

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Sep - Targetgroup: ALL 18-54

Source: CIM TV - Live +7 including guests

Variable	Channel	Daypart	YTD-19	YTD-20	YTD-21	YTD-22	22 vs 21
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	30,4%	32,8%	30,3%	28,4%	94
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	72,4%	67,0%	63,7%	59,8%	94
	Video on demand + Digital recorder	"	21,4%	27,8%	33,1%	40,0%	121
% Time shift viewing (4)	All Channels	"	21,5%	24,0%	26,3%	25,5%	97
	Main Channels (5)	"	21,9%	24,5%	26,9%	27,3%	101
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	87	88	86	87	
	Main channels (5) - TSV	"	50	51	55	53	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	121	115	98	89	91
	All TV channels (TSV)	"	27	29	28	24	87
	All TV channels (Live + TSV)	"	148	145	126	113	90
	Other TV Screen Usage	"	65	84	83	89	107
	Total TV Screen Usage	"	213	229	209	201	97



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Sep-22

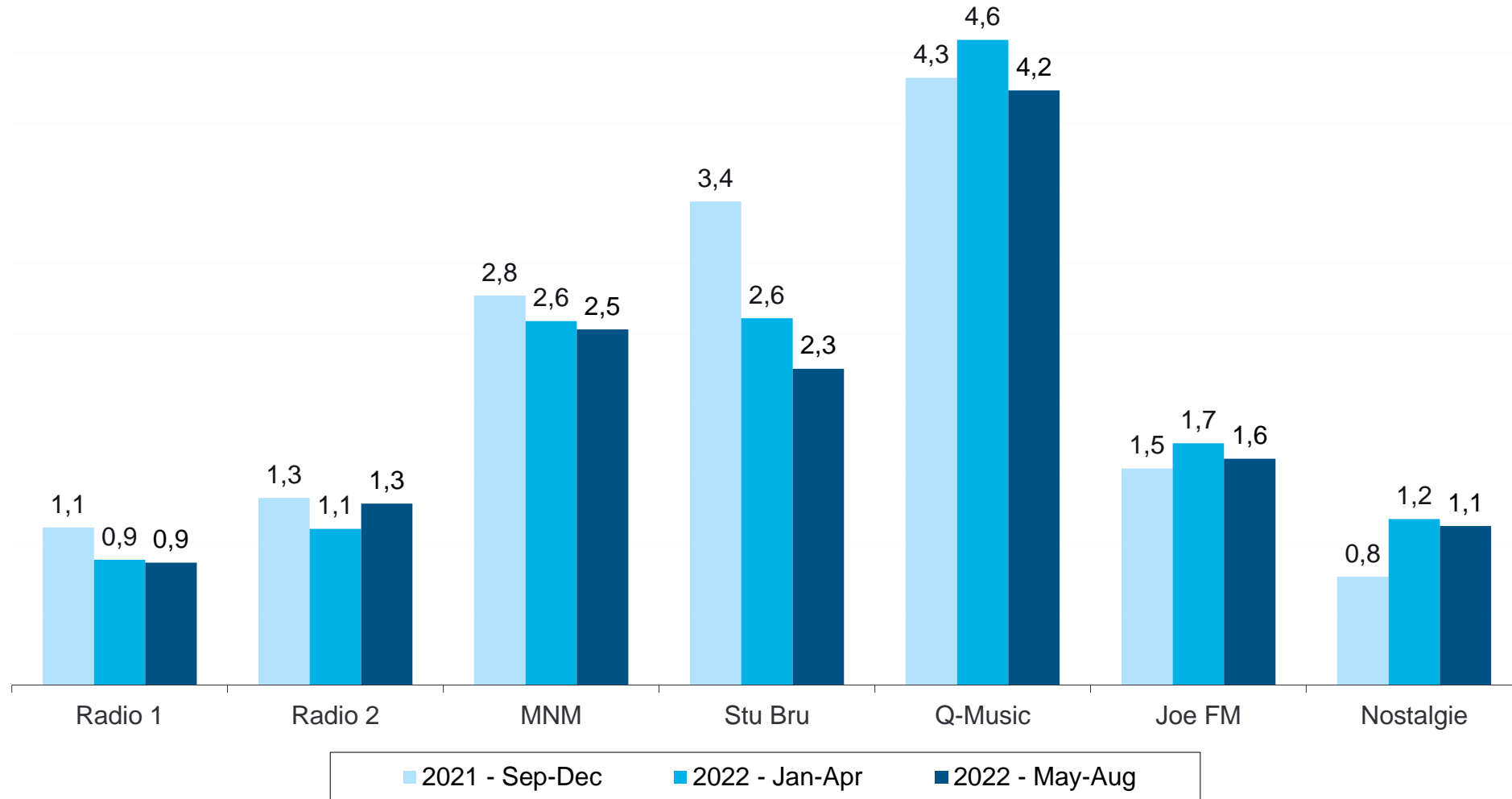
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.003.588	11	Gazet van Antwerpen	1.391.712
2	Nieuwsblad	2.554.860	12	Metrotime	1.293.012
3	SudInfo	2.012.220	13	L'Avenir.net	1.282.428
4	VRT	1.991.304	14	De Morgen	1.260.504
5	RTBF.be	1.761.480	15	Knack/Le Vif	1.116.864
6	RTL.be	1.753.500	16	De Standaard	1.102.752
7	2dehands.be/2ememain.be	1.706.376	17	7sur7.be	1.076.040
8	Le Soir	1.602.636	18	Sporza	1.044.960
9	Immoweb	1.574.664	19	La Libre.be	1.024.212
10	DH.be	1.516.620	20	Buienradar	978.096



Key Radio figures

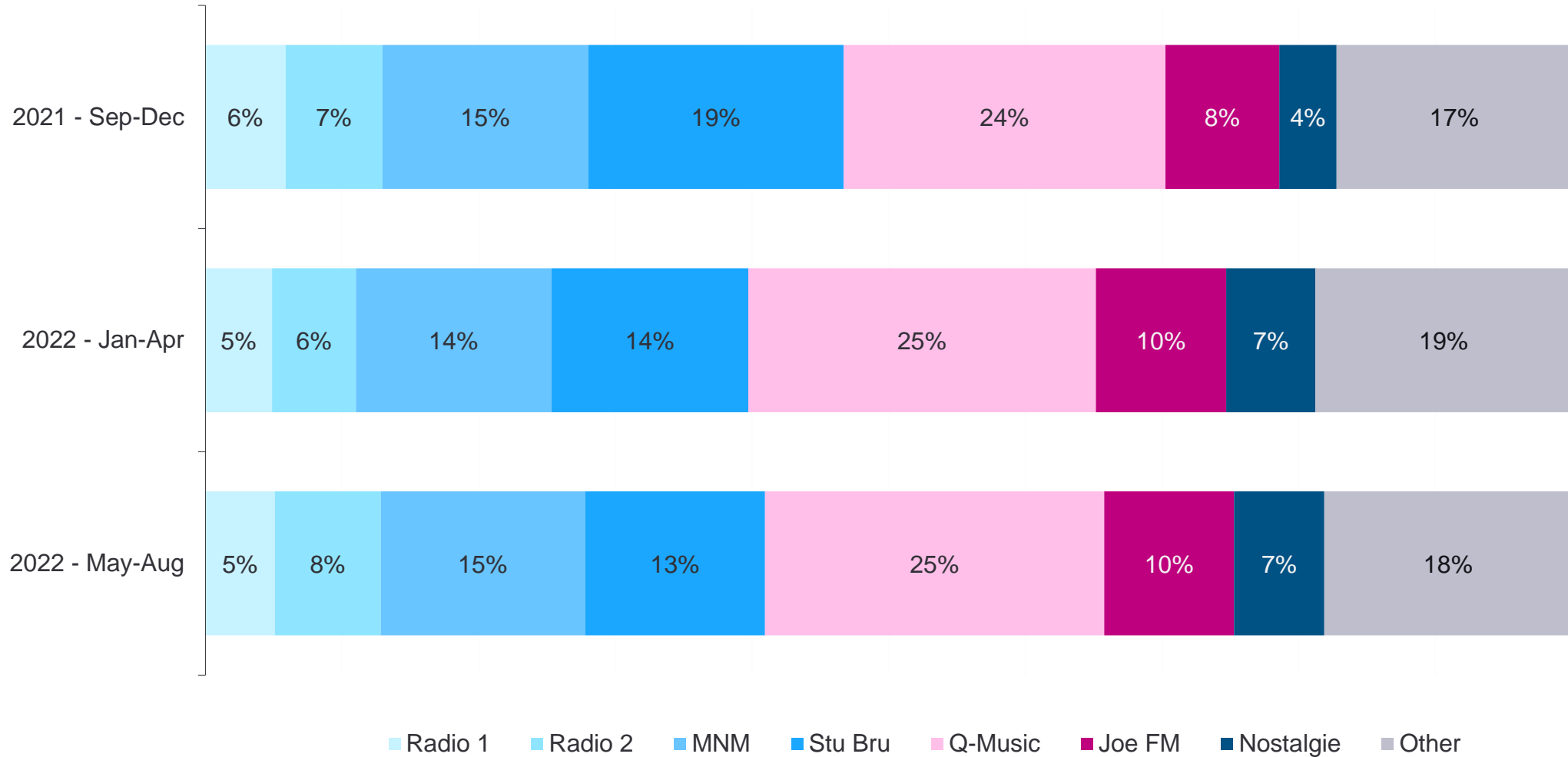
KEY RADIO FIGURES NORTH

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



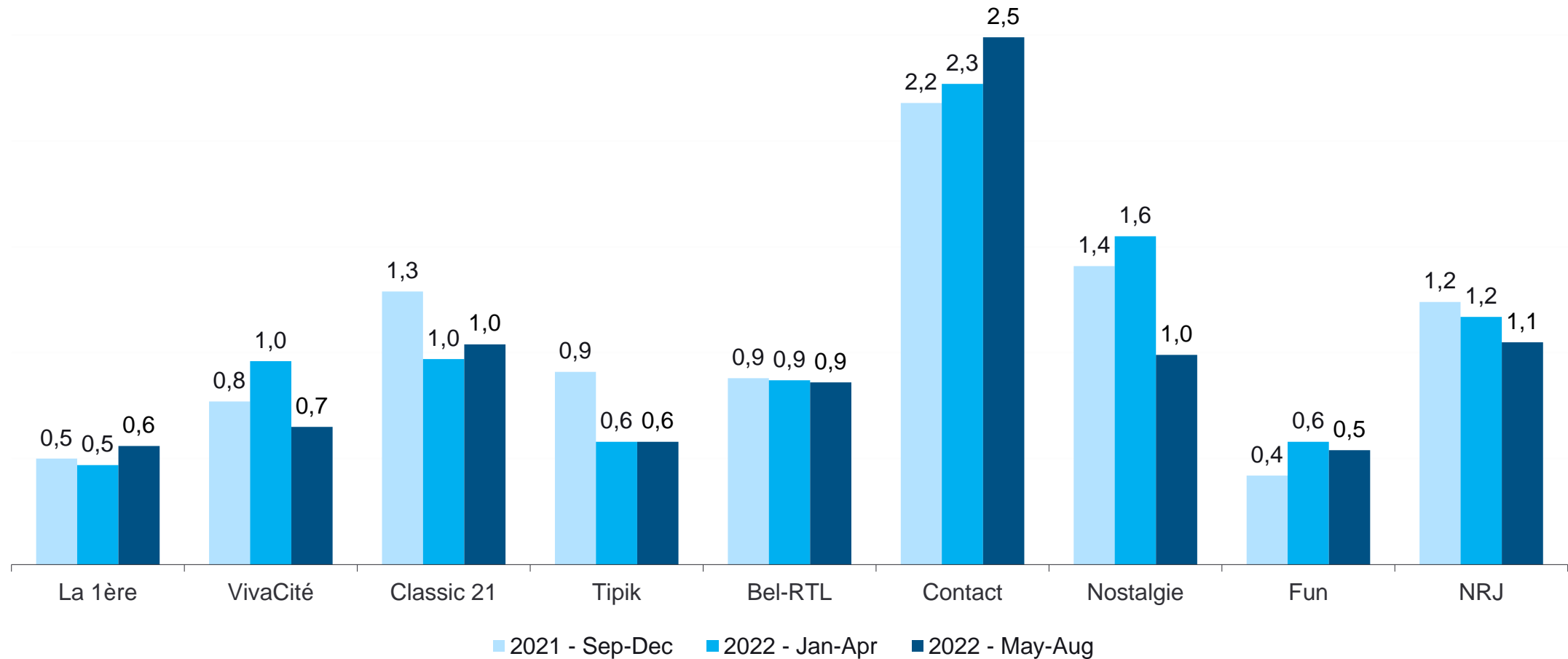
KEY RADIO FIGURES NORTH

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



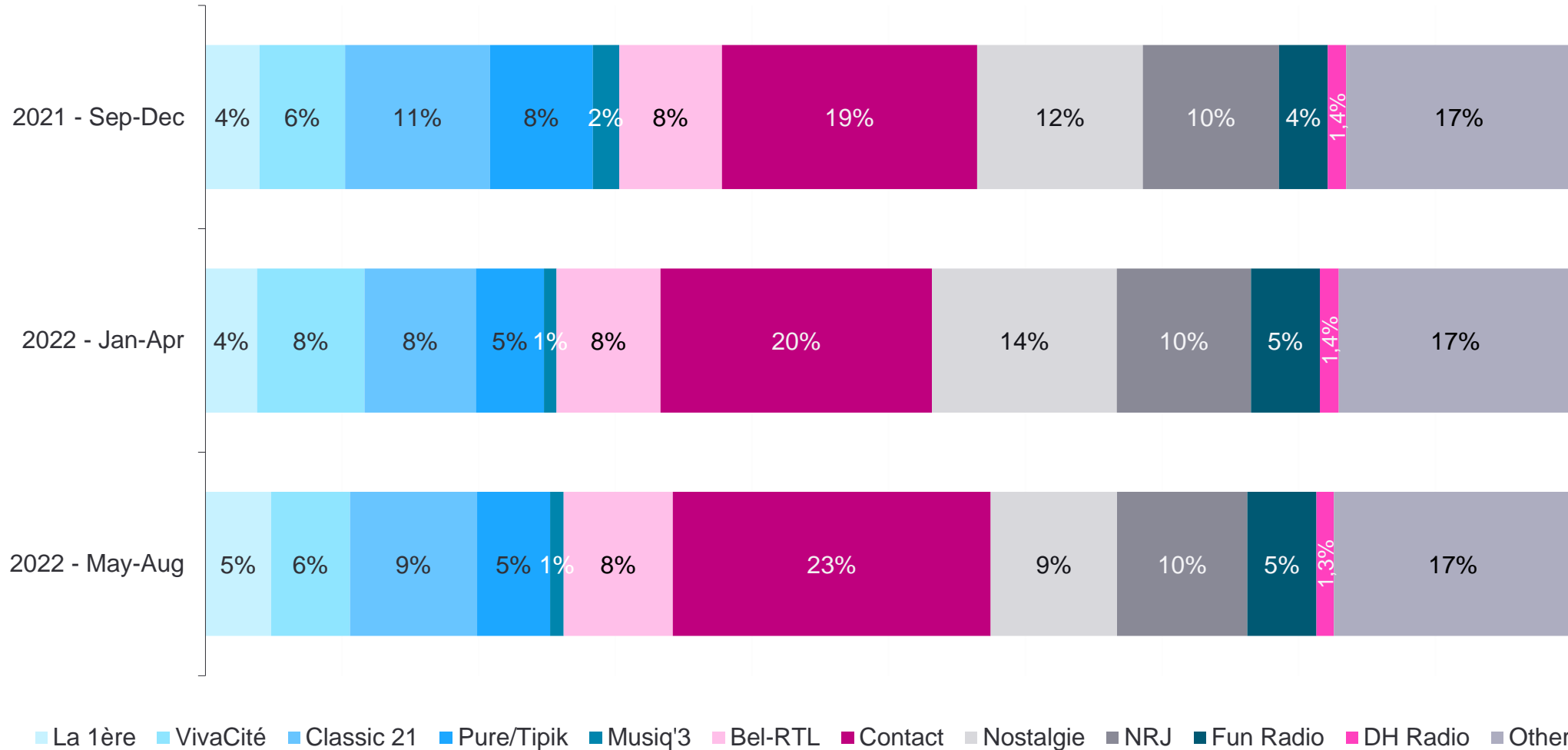
KEY RADIO FIGURES SOUTH

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 2021 (Paid + Free - digital sales included)

NORTH	Circulation	vs 2020	Digital Part	vs 2020
Het Laatste Nieuws/De Nieuwe Gazet	226.076	↓ 98	18%	↑ 127
Het Nieuwsblad/De Gentenaar	200.875	↓ 98	12%	↑ 128
De Standaard	113.616	↑ 103	41%	↑ 113
Het Belang van Limburg	84.206	↓ 99	15%	↑ 123
Gazet van Antwerpen	70.008	↓ 97	16%	↑ 121
De Tijd	53.206	↑ 107	55%	↑ 108
De Morgen	48.293	↑ 104	48%	↑ 109
Total North	796.280	→ 100	24%	↑ 119

SOUTH	Circulation	vs 2020	Digital Part	vs 2020
Le Soir	75.503	↑ 102	61%	↑ 111
L'Avenir	65.713	↓ 95	10%	↑ 110
SudInfo	64.429	↓ 93	21%	↑ 102
La Libre Belgique	40.650	→ 100	42%	↑ 111
La DH	29.776	↓ 93	23%	↑ 112
L'Echo	16.914	↑ 101	57%	↑ 108
Grenz Echo	8.035	↓ 96	17%	↑ 133
Total South	301.020	↓ 97	34%	↑ 112

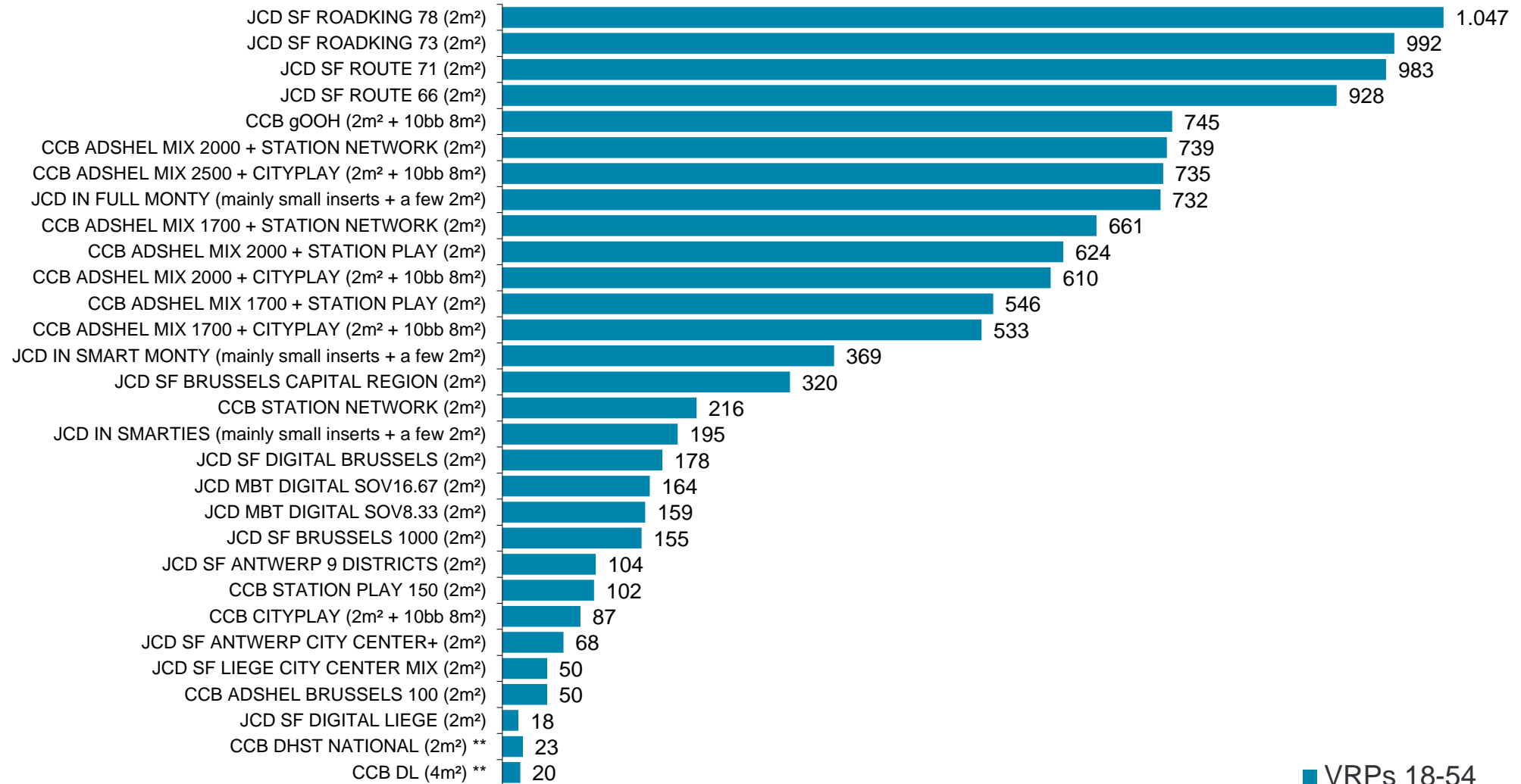
Key Print Figures - Magazines Circulation - Year 2021 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages		TOTAL	
	Circulation	vs 2020	Circulation	vs 2020	Circulation	vs 2020	Circulation	vs 2020
Television	539.675	↓ 94	327.834	↓ 95			867.509	↓ 94
Women	291.336	↓ 94	121.953	↓ 92			413.289	↓ 94
Lifestyle Culture & Travel	115.332	↑ 101	65.710	↓ 96	188.696	↑ 102	369.738	↑ 101
Business & News	97.682	↓ 95	125.950	↓ 98	44.714	↑ 103	268.346	↓ 98
Generation (Youth/Senior)			12.826	↓ 95	116.634	↑ 102	129.460	↑ 101
Men	21.458	↓ 92	11.159	↓ 94	32.264	↑ 105	64.881	↓ 99
Build & Deco	36.700	↓ 82	16.690	↓ 77	10.301	↑ 102	63.691	↓ 84
TOTAL	1.102.183	↓ 95	682.122	↓ 94	392.609	↑ 102	2.176.914	↓ 96



Out Of Home Ratings

OOH Ratings - Small sized billboards networks VRP's* on ALL 18-54 - 7 days (except **) - National



■ VRPs 18-54

OOH Ratings - Average & large sized billboards networks VRP's* on ALL 18-54 - 14 days (except **) - National

