



space

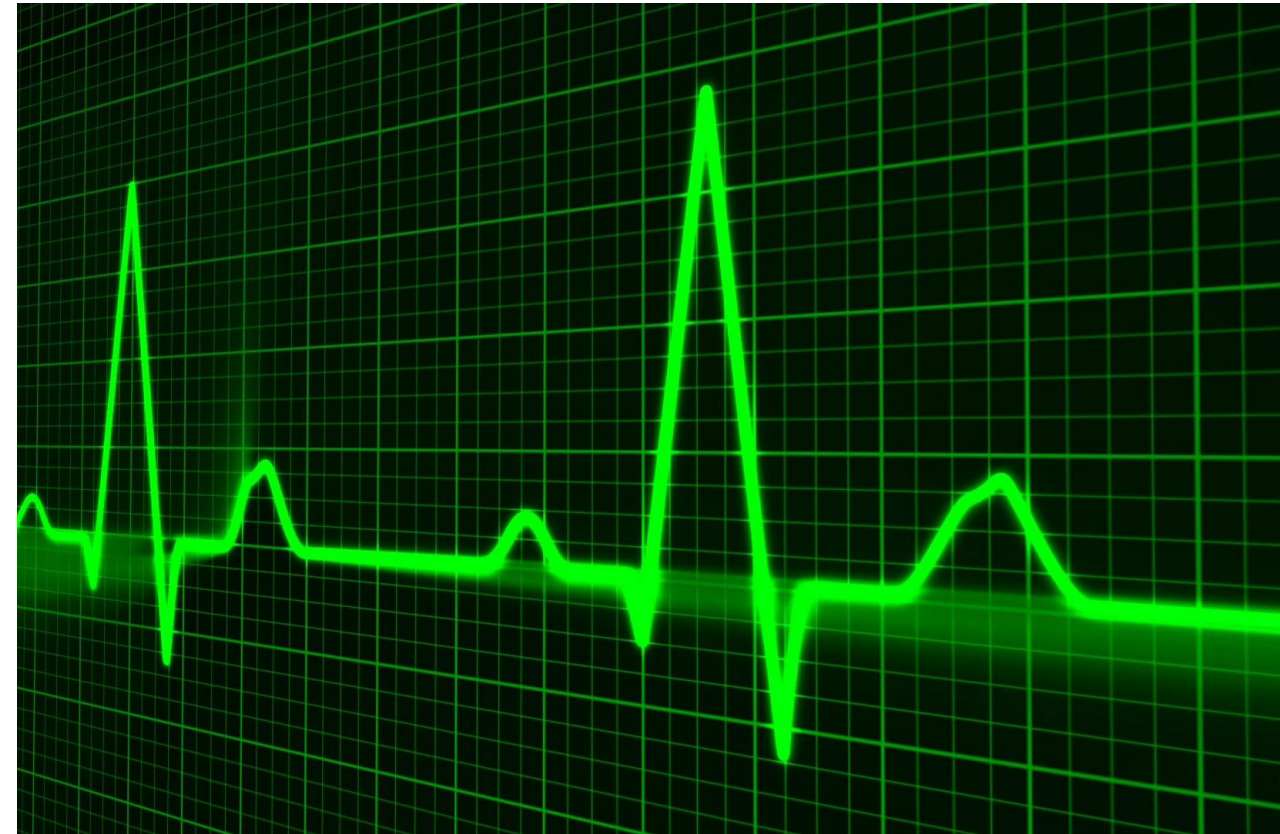
CONNECTIONS AGENCY



intelligence  
Market & Business

# MARKET PERFORMANCES BAROMETER

June 2022



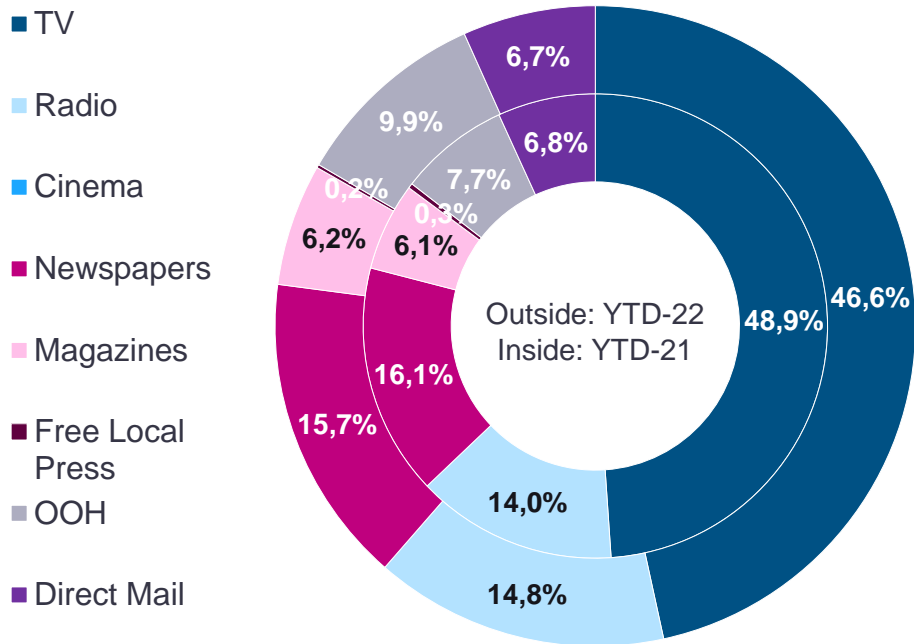
# Gross Media Investments Evolution

# GROSS MEDIA INVESTMENTS EVOLUTION - Jan-May 2022

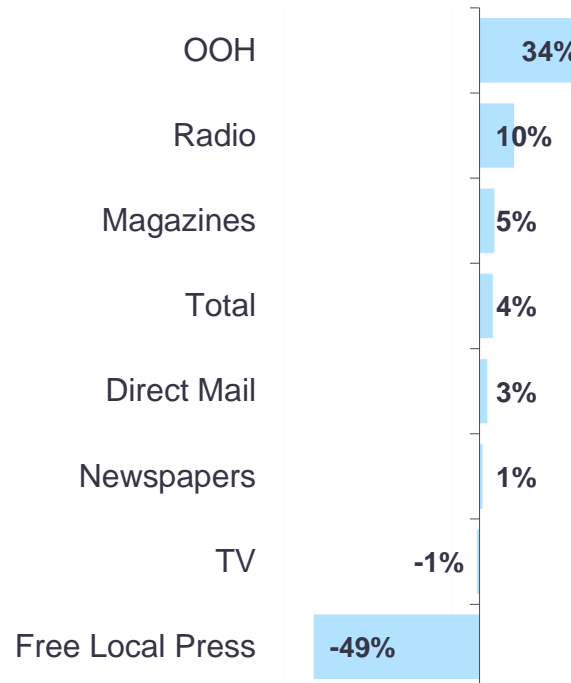
NB : No Internet figures in MDB universe / Cinema figures are missing in 2022

Market	National	North	South
<ul style="list-style-type: none"> <li>■ € Mo</li> <li>■ vs YTD-21</li> <li>■ % Region</li> </ul>	1.503,4 + 4,1% 100%	924,8 + 4,1% 61,5%	578,5 + 4,0% 38,5%

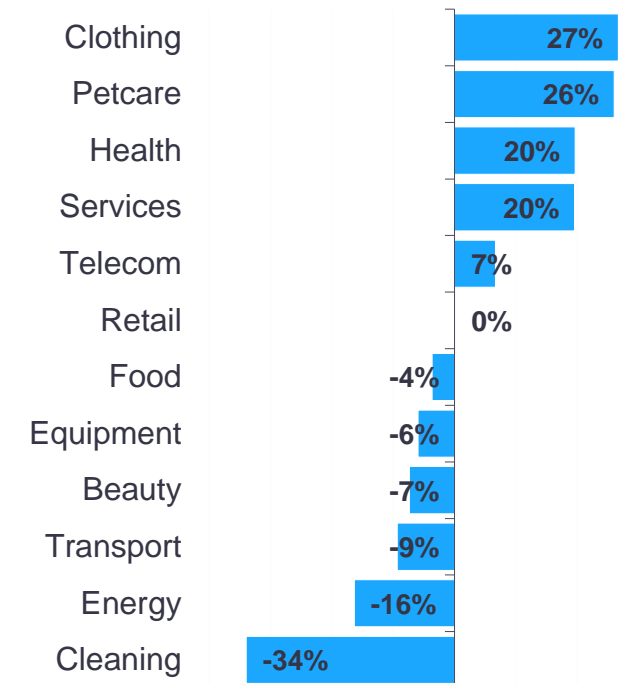
**Media Mix Evol.**



**Media Evol. (vs YTD-21)**



**EcoGroups Evol. (vs YTD-21)**



# MDB TOP 30 ADVERTISERS - Jan-May 2022

NB : No Internet figures in MDB universe / Cinema figures are missing in 2022

Rank	ADV.GROUP	Gross Inv.	vs 2021
1	COLRUYT GROUP	50,6	↓ 87
2	PROCTER & GAMBLE BENELUX	41,2	↓ 74
3	AHOLD DELHAIZE	29,1	↓ 94
4	D'IETEREN GROUP	22,6	↓ 73
5	THE COCA-COLA COMPANY	21,8	↓ 83
6	PROXIMUS GROUP	20,0	↑ 144
7	RECKITT & BENCKISER	16,8	↔ 101
8	TELENET GROUP HOLDING	16,8	↓ 84
9	CARREFOUR GROUP	16,8	↑ 172
10	STELLANTIS	16,4	↓ 87
11	ORANGE	15,2	↑ 129
12	UNILEVER	15,1	↓ 67
13	LOTERIE NATIONALE	14,2	↑ 110
14	L'OREAL GROUP	13,0	↔ 99
15	ALDI	13,0	↑ 142

Rank	ADV.GROUP	Gross Inv.	vs 2021
16	AS WATSON	13,0	↑ 113
17	THE WALT DISNEY COMPANY	12,1	↑ 200
18	FERRERO	10,7	↓ 88
19	NETHYS	10,6	↓ 90
20	BMW GROUP BELGIUM	10,1	↓ 87
21	RENAULT-NISSAN ALLIANCE	10,0	↓ 75
22	GROUPE 3 SUISES	9,9	↑ 121
23	3I GROUP	9,9	↑ 376
24	HELLOFRESH	9,4	↓ 97
25	MONDELEZ INTERNATIONAL	8,9	↓ 87
26	LIDL & CO	8,6	↓ 82
27	BELFIUS	8,3	↑ 283
28	HENKEL	8,3	↓ 88
29	NESTLE GROUP	8,1	↓ 71
30	COOLBLUE	7,5	↓ 83

\* : PSA + FCA



# Key TV figures

# Key TV figures North - Jun-22

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Jun-22	YTD-22	Jun-22	YTD-22	Jun-22	YTD-22
VTM	PRP 18-54	5,1	6,8	26,6	28,0	26,5	156,8
VTM2	PRP 18-54	1,3	1,5	6,8	6,2	5,6	36,9
VTM3	PRP 18-54	0,9	0,8	4,7	3,4	2,5	18,5
VTM4	MEN 18-54	0,4	0,5	2,8	2,6	3,2	20,0
Play4	PRP 18-54	1,4	2,8	7,3	11,4	9,1	75,9
Play5	PRP 18-54	0,7	0,9	3,6	3,7	5,9	29,8
Play6	PRP 18-54	0,5	0,5	2,5	1,9	5,8	32,1
Total TV	PRP 18-54	19,0	24,3				
Total TV	MEN 18-54	15,2	19,5				

# Key TV indexes North - Jun-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	
		Jun-22	YTD-22	Jun-22	YTD-22	Jun-22	YTD-22
VTM	PRP 18-54	↑ 124	↑ 107	↑ 134	↑ 113	↓ 84	↓ 85
VTM2	PRP 18-54	↑ 152	→ 100	↑ 164	↑ 106	↓ 74	↓ 84
VTM3	PRP 18-54	↑ 146	↓ 90	↑ 159	↓ 95	↓ 36	↓ 64
VTM4	MEN 18-54	↓ 98	↓ 91	↑ 119	↓ 98	↓ 72	↑ 115
Play4	PRP 18-54	↑ 105	↓ 88	↑ 114	↓ 93	↓ 83	↓ 84
Play5	PRP 18-54	↓ 96	↓ 80	↑ 103	↓ 85	↑ 114	↓ 81
Play6	PRP 18-54	↓ 94	↓ 77	→ 101	↓ 82	↑ 125	↑ 172
Total TV	PRP 18-54	↓ 92	↓ 95				
Total TV	MEN 18-54	↓ 83	↓ 93				

# 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-19	YTD-20	YTD-21	YTD-22	22 vs 21
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	28,7%	31,8%	30,3%	<b>28,7%</b>	95
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	82,1%	79,6%	74,0%	<b>72,6%</b>	98
	Video on demand + Digital recorder	"	13,9%	16,6%	22,8%	<b>26,8%</b>	118
<b>% Time shift viewing (4)</b>	All Channels	"	29,7%	32,9%	33,3%	<b>37,8%</b>	113
	Main Channels (5)	"	33,5%	36,5%	38,5%	<b>42,8%</b>	111
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	87	87	80	<b>82</b>	
	Main channels (5) - TSV	"	35	37	36	<b>40</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	97	102	86	<b>77</b>	90
	All TV channels (TSV)	"	33	39	36	<b>36</b>	101
	All TV channels (Live + TSV)	"	131	141	121	<b>113</b>	93
	Other TV Screen Usage	"	37	47	55	<b>54</b>	99
	Total TV Screen Usage	"	168	189	176	<b>167</b>	95



## Key TV figures South - Jun-22

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Jun-22	YTD-22	Jun-22	YTD-22	Jun-22	YTD-22
RTL-TVI	PRP 18-54	4,7	5,3	26,1	25,4	18,4	110,5
Club-RTL	MEN 18-54	0,8	0,9	5,6	6,0	2,1	16,0
Plug-RTL	ALL 15-34	0,4	0,5	5,1	5,0	1,6	10,4
TF1	PRP 18-54	2,1	2,5	11,6	12,1	4,5	29,9
La Une	PRP 18-54	2,2	3,0	12,1	14,6	6,6	51,0
Tipik	PRP 18-54	1,0	1,0	5,3	4,8	2,1	13,0
AB3	PRP 18-44	1,1	1,0	7,3	5,9	2,1	14,1
TTV	PRP 18-54	18,2	20,8				
TTV	PRP 18-44	14,8	17,2				
TTV	ALL 15-34	8,6	10,3				
TTV	MEN 18-54	13,7	15,5				

# Key TV indexes South - Jun-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	
		Jun-22	YTD-22	Jun-22	YTD-22	Jun-22	YTD-22
RTL-TVI	PRP 18-54	↑ 122	↓ 91	↑ 146	↑ 103	↓ 94	↓ 87
Club-RTL	MEN 18-54	↑ 169	↓ 92	↑ 220	↑ 107	↓ 76	↓ 85
Plug-RTL	ALL 15-34	↑ 133	↓ 91	↑ 192	↑ 111	↓ 87	↔ 101
TF1	PRP 18-54	↑ 119	↓ 88	↑ 142	↔ 99	↓ 84	↑ 109
La Une	PRP 18-54	↓ 43	↓ 73	↓ 51	↓ 83	↓ 56	↓ 94
Tipik	PRP 18-54	↓ 24	↓ 60	↓ 28	↓ 68	↓ 25	↓ 65
AB3	PRP 18-44	↓ 90	↓ 80	↑ 115	↓ 88	↔ 99	↑ 109
TTV	PRP 18-54	↓ 84	↓ 89				
TTV	PRP 18-44	↓ 78	↓ 90				
TTV	ALL 15-34	↓ 70	↓ 82				
TTV	MEN 18-54	↓ 76	↓ 86				

# 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-19	YTD-20	YTD-21	YTD-22	22 vs 21
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	32,1%	35,2%	32,1%	<b>30,0%</b>	93
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	73,8%	67,7%	64,5%	<b>61,1%</b>	95
	Video on demand + Digital recorder	"	20,2%	27,2%	31,7%	<b>38,5%</b>	121
<b>% Time shift viewing (4)</b>	All Channels	"	21,6%	24,2%	27,2%	<b>25,9%</b>	95
	Main Channels (5)	"	21,9%	24,9%	27,7%	<b>27,9%</b>	101
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	88	89	87	<b>88</b>	
	Main channels (5) - TSV	"	51	51	55	<b>52</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	129	123	102	<b>94</b>	92
	All TV channels (TSV)	"	29	32	30	<b>26</b>	86
	All TV channels (Live + TSV)	"	157	155	133	<b>120</b>	91
	Other TV Screen Usage	"	65	88	85	<b>90</b>	105
	Total TV Screen Usage	"	222	243	217	<b>210</b>	96



# Top websites

# Key Digital Figures - TOP BELGIAN WEBSITES - Jun-22

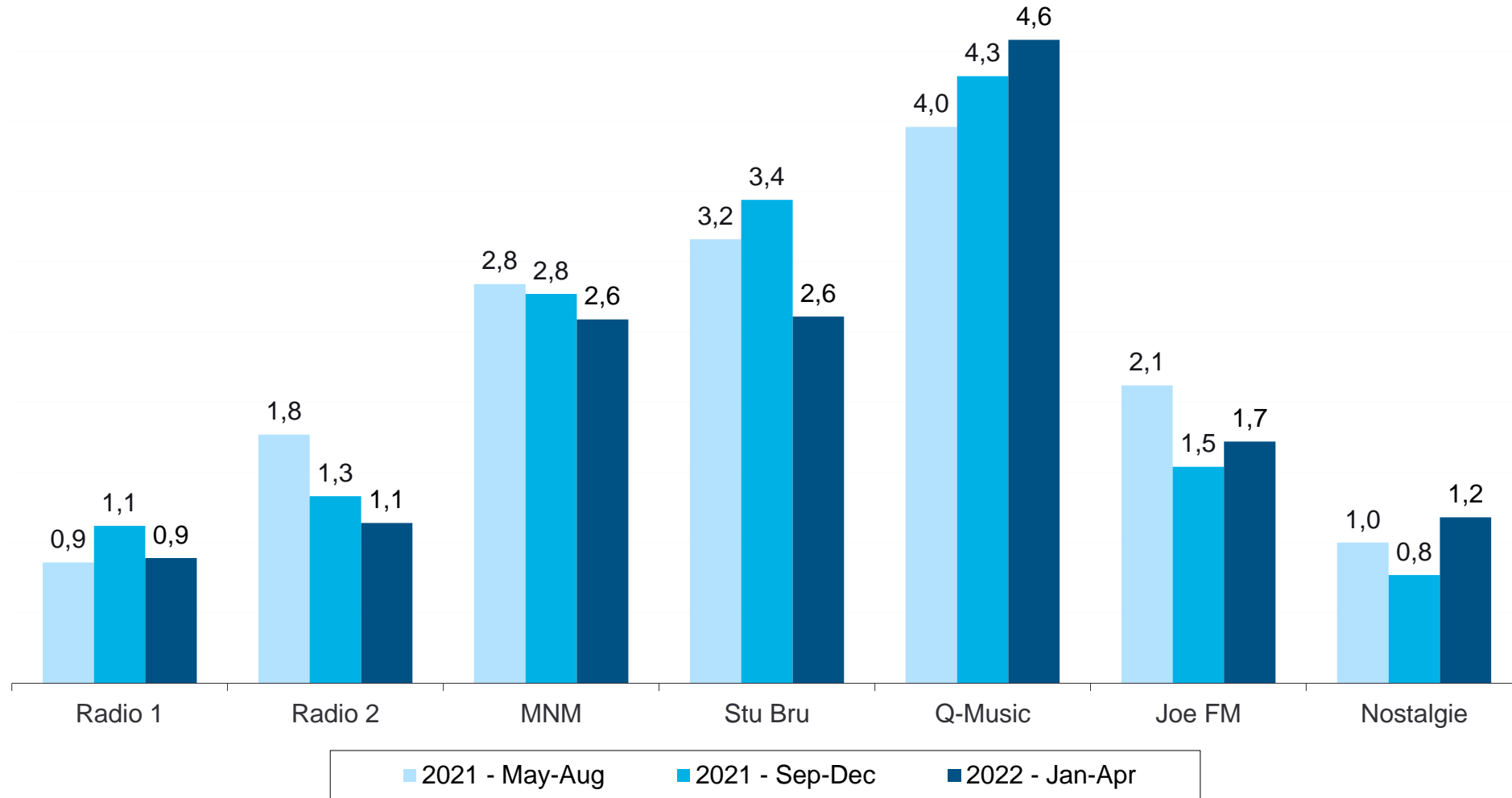
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.081.708	11	L'Avenir.net	1.279.068
2	Nieuwsblad	2.403.408	12	Metrotime	1.181.376
3	Sudinfo	1.946.112	13	De Morgen	1.115.520
4	VRT	1.807.092	14	La Libre.be	1.113.336
5	RTL.be	1.798.524	15	Knack/Levif	1.073.604
6	Immoweb	1.721.076	16	De Standaard	1.064.112
7	DH.be	1.665.384	17	7sur7.be	1.034.880
8	Le Soir	1.648.416	18	Buienradar	1.025.808
9	RTBF.be	1.589.616	19	Flair	999.600
10	Gazet van Antwerpen	1.550.388	20	Sporza	934.332



# Key Radio figures

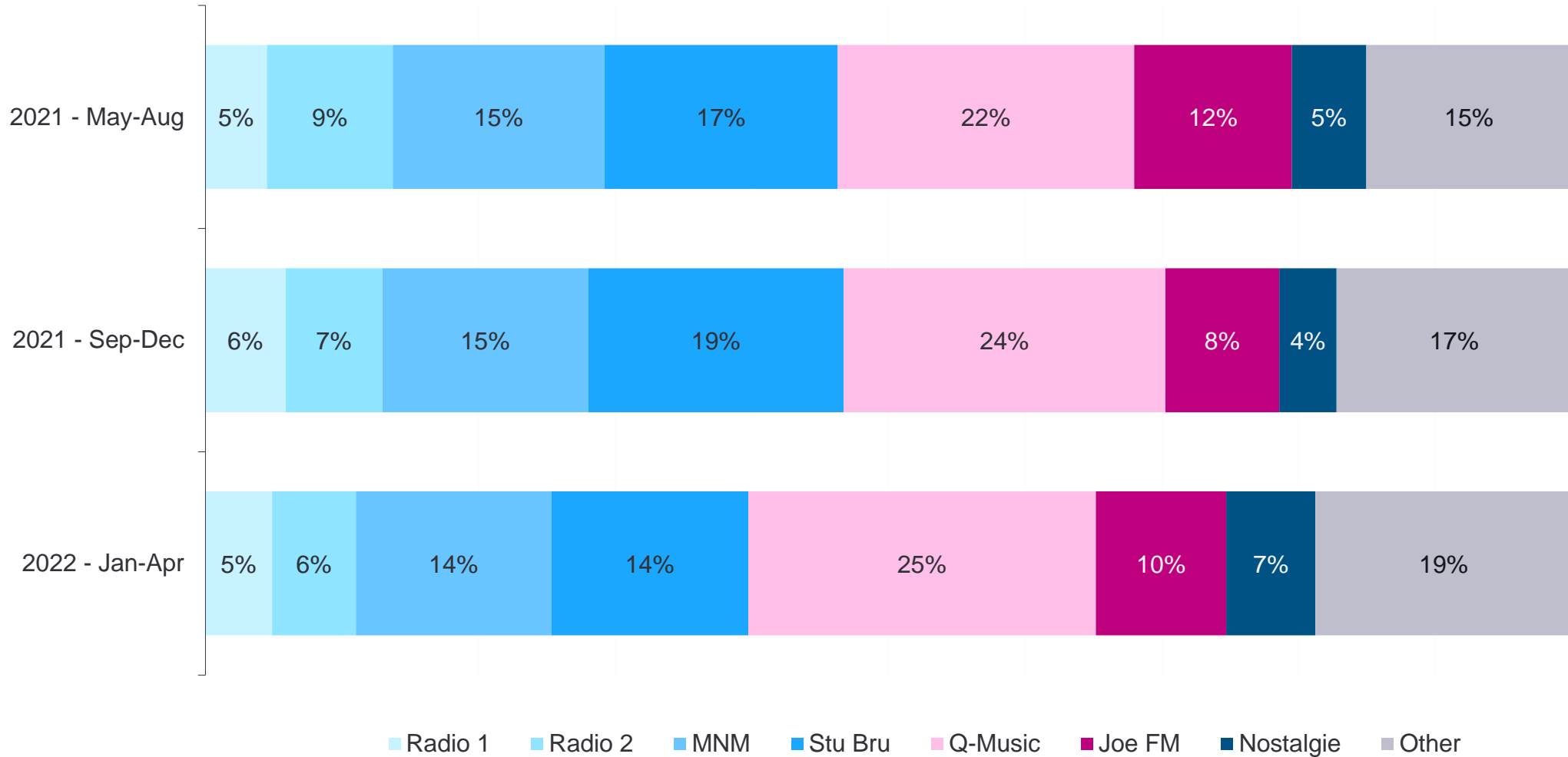
# KEY RADIO FIGURES NORTH

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



# KEY RADIO FIGURES NORTH

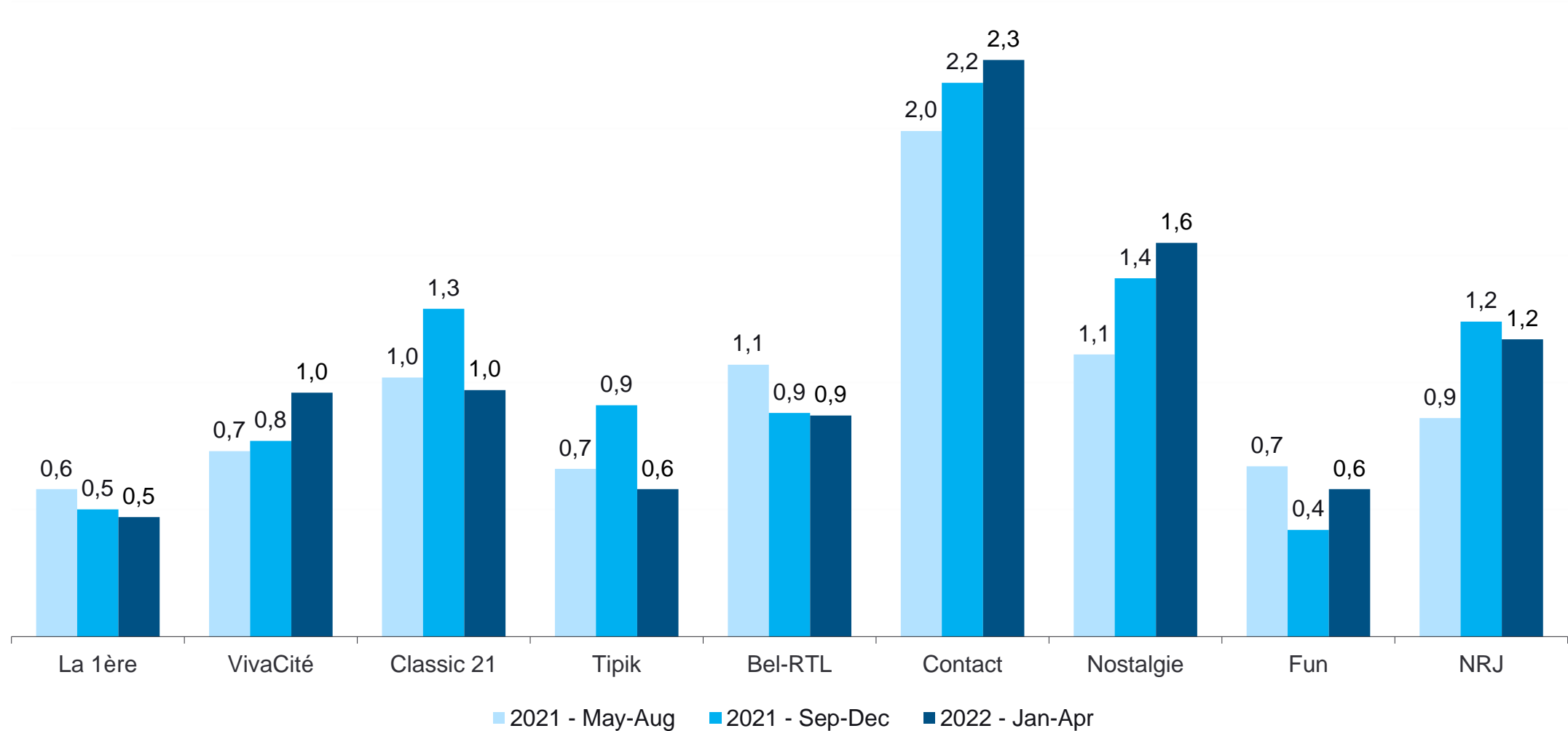
## Audience Shares (%) on ALL 18-44 - 07:00-19:00





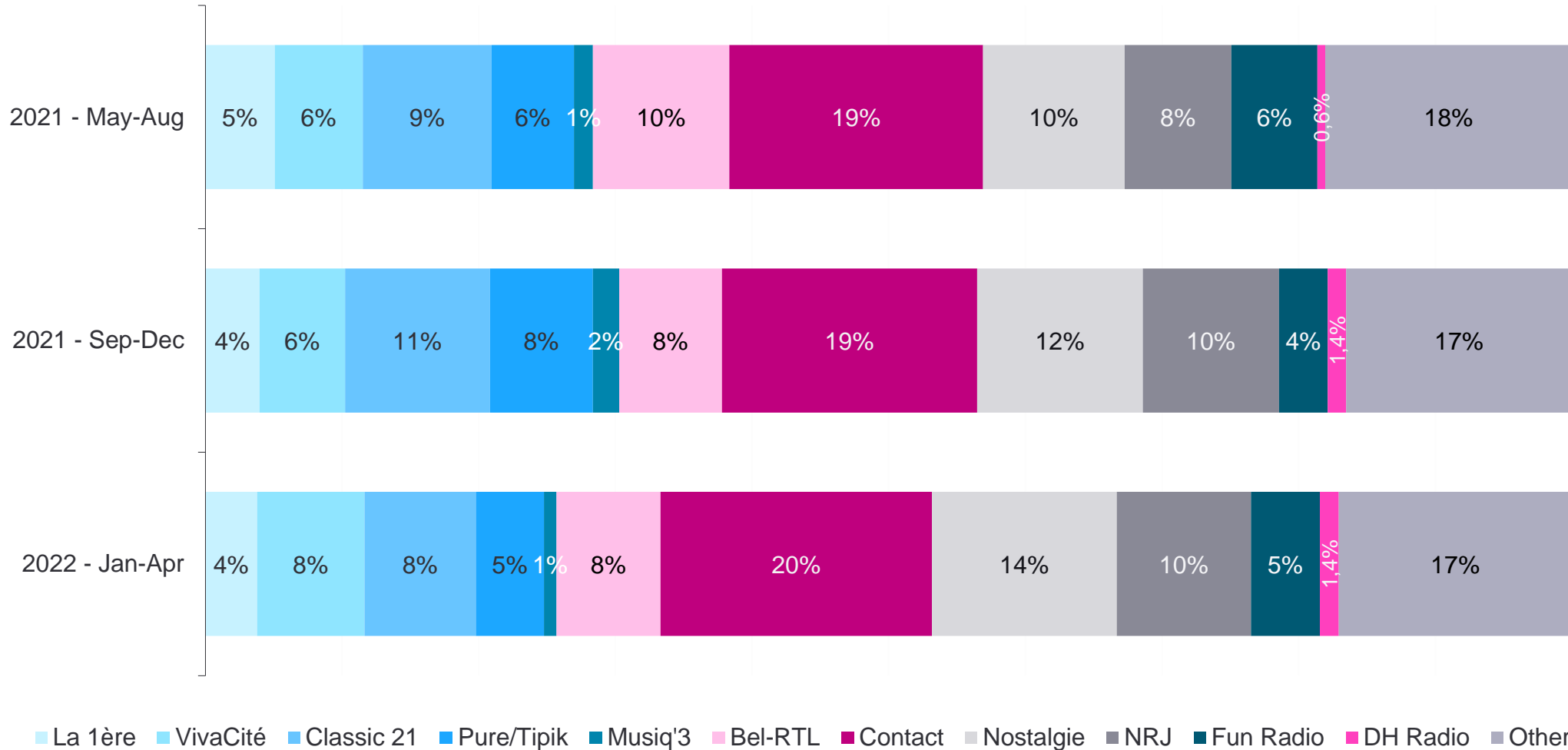
# KEY RADIO FIGURES SOUTH

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	226.075	↓ 98	18%	↑ 127
De Morgen	48.292	↑ 104	48%	↑ 109
Het Nieuwsblad/De Gentenaar	n.a.	n.a.	n.a.	n.a.
De Standaard	n.a.	n.a.	n.a.	n.a.
Het Belang van Limburg	n.a.	n.a.	n.a.	n.a.
Gazet van Antwerpen	n.a.	n.a.	n.a.	n.a.
De Tijd	n.a.	n.a.	n.a.	n.a.
<b>Total North</b>	<b>274.367</b>	<b>↓ 99</b>	<b>23%</b>	<b>↑ 121</b>

SOUTH	Circulation	vs 2020	Digital Part	vs 2020
Le Soir	75.536	↑ 102	61%	↑ 111
L'Avenir	65.733	↓ 95	10%	↑ 110
Sud Presse	64.389	↓ 93	21%	↑ 102
La Libre Belgique	40.651	→ 100	42%	↑ 111
La DH	29.777	↓ 93	23%	↑ 112
Grenz Echo	8.057	↓ 96	17%	↑ 132
L'Echo	n.a.	n.a.	n.a.	n.a.
<b>Total South</b>	<b>284.143</b>	<b>↓ 97</b>	<b>32%</b>	<b>↑ 112</b>

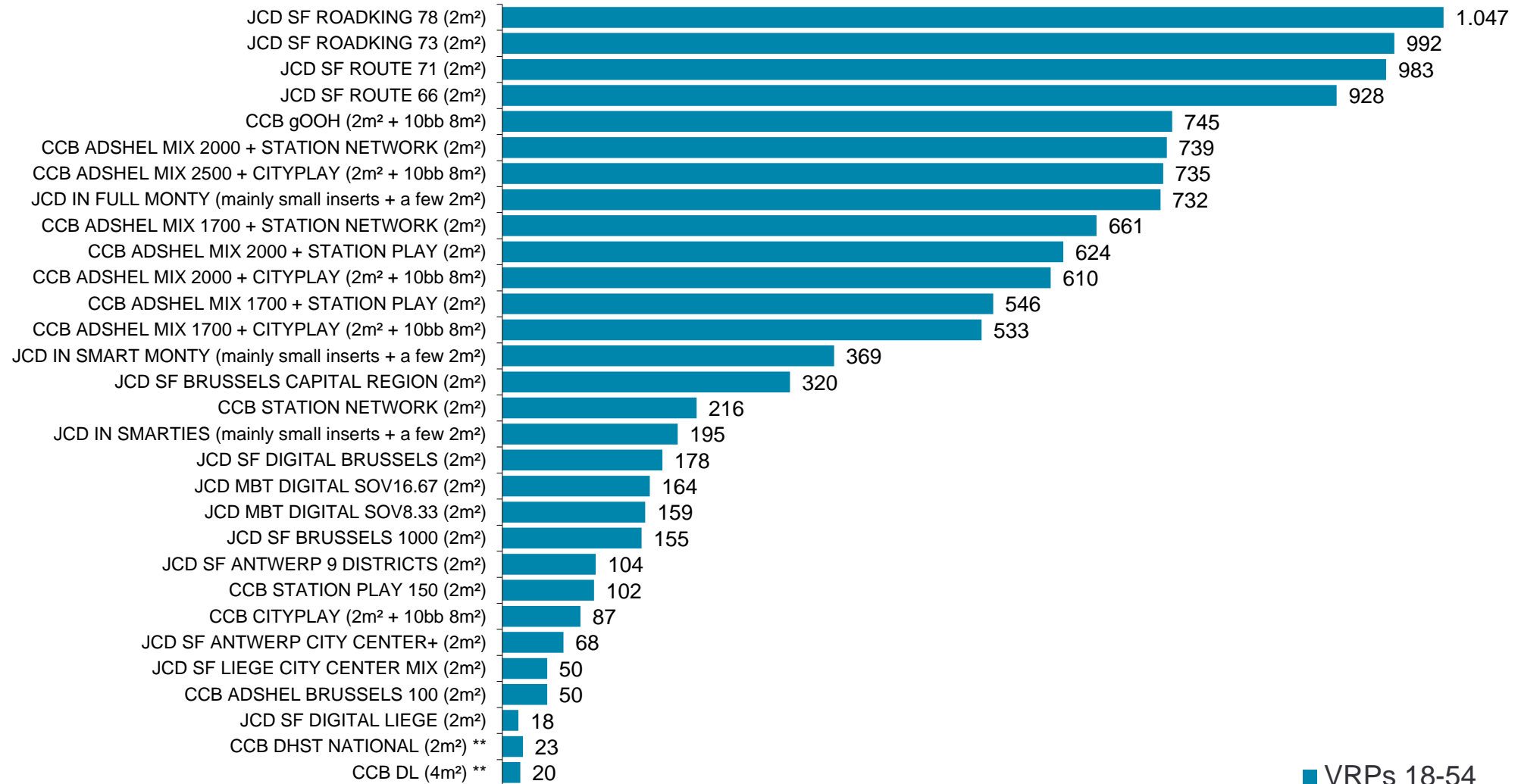
# Key Print Figures - Magazines Circulation - Year 2021 (Paid + Free - digital sales included)

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
<b>TOTAL</b>	<b>1.102.183</b>	<b>↓ 95</b>	<b>682.122</b>	<b>↓ 94</b>	<b>392.609</b>	<b>↑ 102</b>	<b>2.176.914</b>	<b>↓ 96</b>



# 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

