



space

CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

May 2020



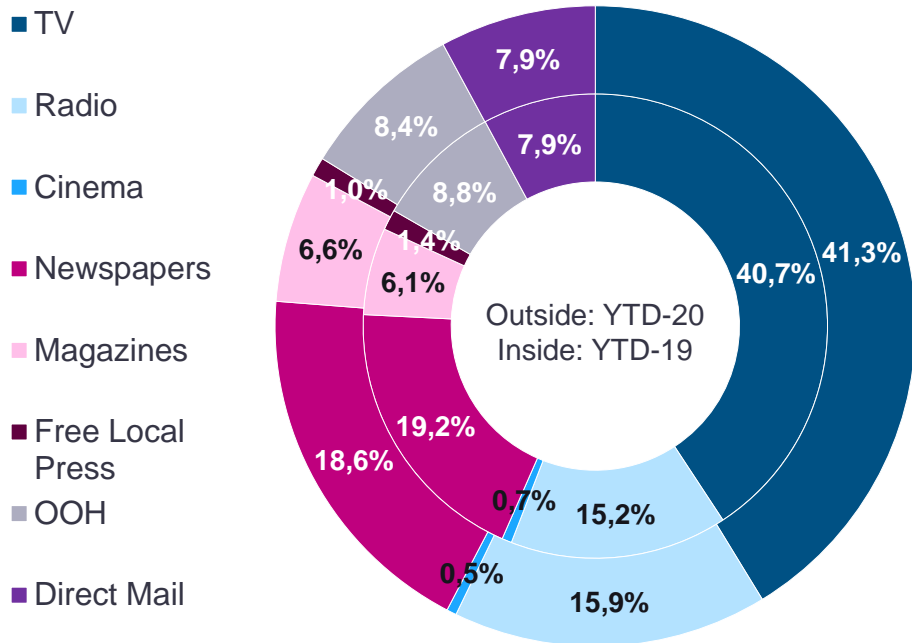
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Apr 2020

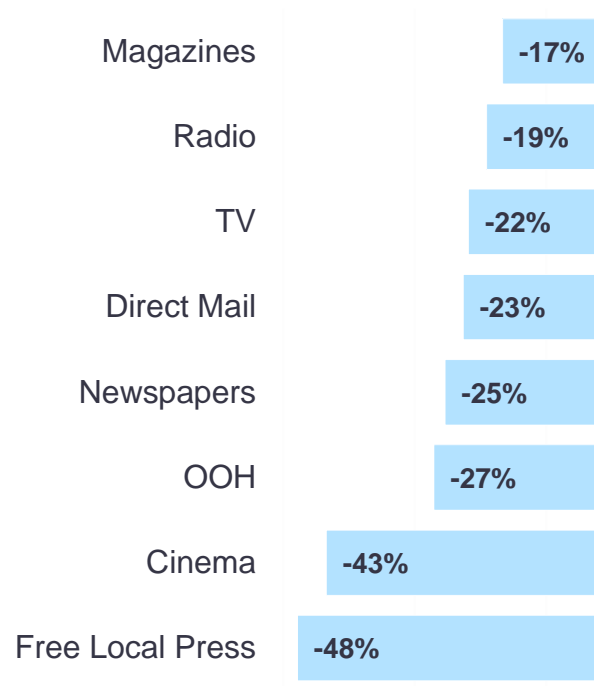
NB : No Internet figures in MDB for 2019 & 2020

| Market | National | North | South |
|---|--------------------------|-------------------------|-------------------------|
| <ul style="list-style-type: none"> ■ € Mo ■ vs YTD-19 ■ % Region | 927,2 - 22,8% 100% | 559,9 - 22,9% 60% | 367,3 - 22,7% 40% |

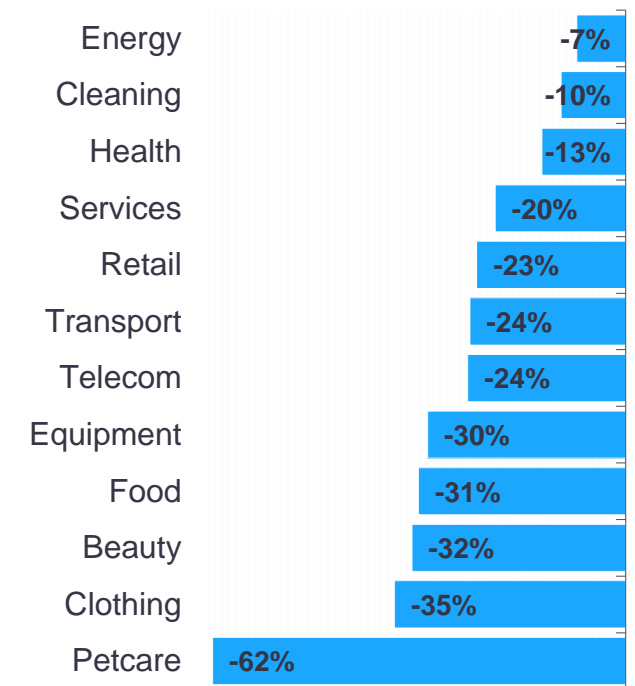
Media Mix Evol.



Media Evol. (vs YTD-19)



EcoGroups Evol. (vs YTD-19)



MDB TOP 30 ADVERTISERS - Jan-Apr 2020

NB : No Internet figures in MDB for 2019 & 2020

| Rank | ADV.GROUP | Gross Inv. | vs YTD-19 |
|------|--------------------------|------------|-----------|
| 1 | COLRUYT GROUP | 31,1 | ↓ 96 |
| 2 | PROCTER & GAMBLE BENELUX | 29,4 | ↓ 89 |
| 3 | D'IETEREN GROUP | 20,2 | ↓ 71 |
| 4 | PSA GROUPE | 15,0 | ↓ 70 |
| 5 | AHOLD DELHAIZE | 14,5 | ↔ 101 |
| 6 | RENAULT-NISSAN ALLIANCE | 11,8 | ↑ 111 |
| 7 | ORANGE | 10,1 | ↑ 113 |
| 8 | TELENET GROUP HOLDING | 9,8 | ↓ 75 |
| 9 | UNILEVER | 9,8 | ↓ 66 |
| 10 | ALDI | 9,4 | ↑ 176 |
| 11 | RECKITT & BENCKISER | 8,7 | ↓ 53 |
| 12 | FERRERO | 8,3 | ↓ 90 |
| 13 | PROXIMUS GROUP | 8,3 | ↓ 49 |
| 14 | THE WALT DISNEY COMPANY | 8,0 | ↓ 88 |
| 15 | LOTERIE NATIONALE | 7,4 | ↓ 97 |

| Rank | ADV.GROUP | Gross Inv. | vs YTD-19 |
|------|---------------------------|------------|-----------|
| 16 | VINTED | 7,1 | ↓ 58 |
| 17 | NETHYS | 7,1 | ↑ 134 |
| 18 | THE COCA-COLA COMPANY | 7,0 | ↓ 49 |
| 19 | BEIERSDORF | 6,8 | ↓ 89 |
| 20 | CARREFOUR GROUP | 6,2 | ↓ 56 |
| 21 | GROUPE 3 SUISSES | 5,7 | ↓ 86 |
| 22 | PEPSICO | 5,7 | ↑ 129 |
| 23 | L'OREAL GROUP | 5,6 | ↓ 72 |
| 24 | FIAT CHRYSLER AUTOMOBILES | 5,3 | ↓ 60 |
| 25 | LIDL & CO | 5,2 | ↑ 133 |
| 26 | BMW GROUP BELGIUM | 5,2 | ↓ 93 |
| 27 | NESTLE GROUP | 5,1 | ↑ 176 |
| 28 | AXA GROUP | 5,0 | ↑ 185 |
| 29 | MONDELEZ INTERNATIONAL | 5,0 | ↓ 69 |
| 30 | PERRIGO | 4,9 | ↓ 90 |



Key TV figures

Key TV figures North - May-20

| CHANNEL | CHANNEL'S MARKETING TARGET | RATING (%) 17:00-23:00 | | AUDIENCE SHARE (%) 17:00-23:00 | | C/GRP (€ - no commission) Total Day | |
|----------|----------------------------------|---------------------------|------|-----------------------------------|------|--|----------------|
| | | May-20 | YTD | May-20 | YTD | May-20 | YTD |
| VTM | PRP 18-54 | 6,6 | 7,8 | 24,3 | 25,9 | 1.130 | 797 |
| Q2 | PRP 18-44 | 1,9 | 1,8 | 8,2 | 7,0 | 911 | 752 |
| VITAYA | PRP 18-54 | 1,1 | 1,3 | 4,1 | 4,3 | 846 | 587 |
| CAZ | MEN 18-54 | 0,5 | 0,5 | 1,9 | 1,7 | <i>Package</i> | <i>Package</i> |
| VIER | PRP 18-54 | 3,4 | 3,5 | 12,5 | 11,7 | 1.233 | 935 |
| VIJF | PRP 18-54 | 1,9 | 1,8 | 7,0 | 6,0 | 945 | 728 |
| ZES | PRP 18-54 | 0,7 | 0,6 | 2,5 | 2,1 | <i>Package</i> | <i>Package</i> |
| Total TV | PRP 18-54 | 27,1 | 30,0 | | | | |
| Total TV | PRP 18-44 | 23,7 | 26,1 | | | | |
| Total TV | MEN 18-54 | 22,3 | 24,7 | | | | |

Key TV indexes North - May-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 | |
|----------|------------------|---------------------------------|-------|---|-------|---------------------------------|---------|
| | | May-20 | YTD | May-20 | YTD | May-20 | YTD |
| | | | | | | | |
| VTM | PRP 18-54 | ↑ 112 | ↑ 112 | ↑ 109 | ↑ 106 | ✗ 102 | ✓ 92 |
| Q2 | PRP 18-44 | ↑ 114 | ↔ 101 | ↑ 109 | ↓ 96 | ✓ 89 | ✓ 92 |
| VITAYA | PRP 18-54 | ↓ 84 | ↓ 96 | ↓ 81 | ↓ 90 | ✓ 82 | ✓ 82 |
| CAZ | MEN 18-54 | ↑ 124 | ↑ 104 | ↑ 121 | ↔ 99 | Package | Package |
| VIER | PRP 18-54 | ↓ 91 | ↓ 97 | ↓ 88 | ↓ 91 | ✗ 102 | ✓ 98 |
| VIJF | PRP 18-54 | ↑ 113 | ↑ 105 | ↑ 110 | ↔ 99 | ✓ 96 | ✓ 92 |
| ZES | PRP 18-54 | ↑ 150 | ↑ 110 | ↑ 147 | ↑ 103 | Package | Package |
| Total TV | PRP 18-54 | ↑ 103 | ↑ 106 | | | | |
| Total TV | PRP 18-44 | ↑ 105 | ↑ 105 | | | | |
| Total TV | MEN 18-54 | ↑ 102 | ↑ 106 | | | | |

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-May - 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 | 30,0% | 29,8% | 29,6% | 33,1% | 112 |
| Audience share TSU (%) (2) | Total channels (Live + TSV) | " | 86,3% | 83,8% | 82,4% | 80,0% | 97 |
| | VHS + DVD player + Blu-Ray | " | 3,9% | 3,6% | 2,4% | 2,3% | 93 |
| | Video on demand + Digital recorder | " | 8,6% | 11,2% | 13,6% | 16,2% | 120 |
| | Game console and other devices (3) | " | 1,2% | 1,4% | 1,6% | 1,5% | 94 |
| % Time shift viewing (4) | All Channels | " | 24,9% | 26,4% | 30,2% | 33,2% | 110 |
| | Main Channels (5) | " | 28,0% | 30,2% | 34,1% | 37,0% | 108 |
| Commercial breaks rating vs full daypart rating Index | Main channels (5) - Live | " | 87 | 87 | 87 | 87 | |
| | Main channels (5) - TSV | " | 31 | 34 | 35 | 36 | |
| ATV (Average daily viewing time) in minutes | All TV channels (Live) | Total day | 111 | 108 | 100 | 106 | 107 |
| | All TV channels (TSV) | " | 31 | 32 | 35 | 41 | 118 |
| | All TV channels (Live + TSV) | " | 143 | 140 | 134 | 147 | 110 |
| | Other TV Screen Usage | " | 30 | 36 | 38 | 48 | 128 |
| | Total TV Screen Usage | " | 173 | 176 | 172 | 196 | 114 |

Key TV figures South - May-20

| CHANNEL | CHANNEL'S MARKETING TARGET | RATING (%) 17:00-23:00 | | AUDIENCE SHARE (%) 17:00-23:00 | | C/GRP (€ - with comm.) Total Day | |
|----------|----------------------------------|---------------------------|------|-----------------------------------|------|-------------------------------------|-------|
| | | May-20 | YTD | May-20 | YTD | May-20 | YTD |
| RTL-TVI | PRP 18-54 | 7,0 | 7,6 | 27,1 | 27,2 | 729 | 659 |
| Club-RTL | MEN 18-54 | 0,9 | 1,1 | 4,6 | 5,2 | 1.547 | 1.055 |
| Plug-RTL | ALL 15-34 | 0,6 | 0,7 | 3,9 | 4,3 | 831 | 640 |
| TF1 | PRP 18-54 | 3,7 | 3,6 | 14,1 | 12,9 | 550 | 500 |
| La Une | PRP 18-54 | 3,8 | 4,4 | 14,6 | 15,7 | 808 | 633 |
| La Deux | PRP 18-54 | 1,4 | 1,5 | 5,4 | 5,5 | 732 | 570 |
| AB3 | PRP 18-44 | 1,4 | 1,8 | 6,5 | 7,5 | 827 | 742 |
| TTV | PRP 18-54 | 25,9 | 28,0 | | | | |
| TTV | PRP 18-44 | 21,9 | 24,2 | | | | |
| TTV | ALL 15-34 | 14,4 | 16,0 | | | | |
| TTV | MEN 18-54 | 18,7 | 20,4 | | | | |

Key TV indexes South - May-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 | |
|----------|------------------|------------------------------|-------|--------------------------------------|-------|------------------------------|-------|
| | | May-20 | YTD | May-20 | YTD | May-20 | YTD |
| RTL-TV1 | PRP 18-54 | ↑ 107 | ↑ 102 | ↑ 111 | ↑ 102 | ✓ 78 | ✓ 81 |
| Club-RTL | MEN 18-54 | ↓ 52 | ↓ 71 | ↓ 58 | ↓ 74 | ✗ 155 | ✗ 117 |
| Plug-RTL | ALL 15-34 | ↓ 75 | ↑ 104 | ↓ 79 | ↑ 104 | ✓ 97 | ✓ 81 |
| TF1 | PRP 18-54 | ↑ 120 | ↑ 113 | ↑ 124 | ↑ 113 | ✓ 71 | ✓ 73 |
| La Une | PRP 18-54 | ↑ 106 | ↑ 115 | ↑ 110 | ↑ 115 | ✗ 103 | ✓ 93 |
| La Deux | PRP 18-54 | ↓ 86 | ↑ 112 | ↓ 89 | ↑ 112 | ✓ 100 | ✓ 88 |
| AB3 | PRP 18-44 | ↓ 65 | ↓ 65 | ↓ 67 | ↓ 64 | ✗ 110 | ✗ 112 |
| TTV | PRP 18-54 | ↓ 97 | → 100 | | | | |
| TTV | PRP 18-44 | ↓ 97 | → 101 | | | | |
| TTV | ALL 15-34 | ↓ 94 | → 100 | | | | |
| TTV | MEN 18-54 | ↓ 91 | ↓ 96 | | | | |

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-May - 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 | 34,1% | 33,1% | 32,9% | 36,0% | 109 |
| Audience share TSU (%) (2) | Total channels (Live + TSV) | " | 78,8% | 75,6% | 74,1% | 67,9% | 92 |
| | VHS + DVD player + Blu-Ray | " | 7,2% | 6,6% | 5,1% | 3,9% | 76 |
| | Video on demand + Digital recorder | " | 13,3% | 17,0% | 19,9% | 27,0% | 136 |
| | Game console and other devices (3) | " | 0,7% | 0,8% | 1,0% | 1,3% | 125 |
| % Time shift viewing (4) | All Channels | " | 18,1% | 21,5% | 22,0% | 24,2% | 110 |
| | Main Channels (5) | " | 20,0% | 22,6% | 22,3% | 24,7% | 110 |
| Commercial breaks rating vs full daypart rating Index | Main channels (5) - Live | " | 89 | 87 | 88 | 89 | |
| | Main channels (5) - TSV | " | 51 | 50 | 52 | 51 | |
| ATV (Average daily viewing time) in minutes | All TV channels (Live) | Total day | 147 | 133 | 131 | 126 | 96 |
| | All TV channels (TSV) | " | 28 | 29 | 30 | 33 | 110 |
| | All TV channels (Live + TSV) | " | 174 | 162 | 161 | 159 | 99 |
| | Other TV Screen Usage | " | 55 | 61 | 65 | 89 | 136 |
| | Total TV Screen Usage | " | 229 | 222 | 226 | 248 | 110 |



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - May-20

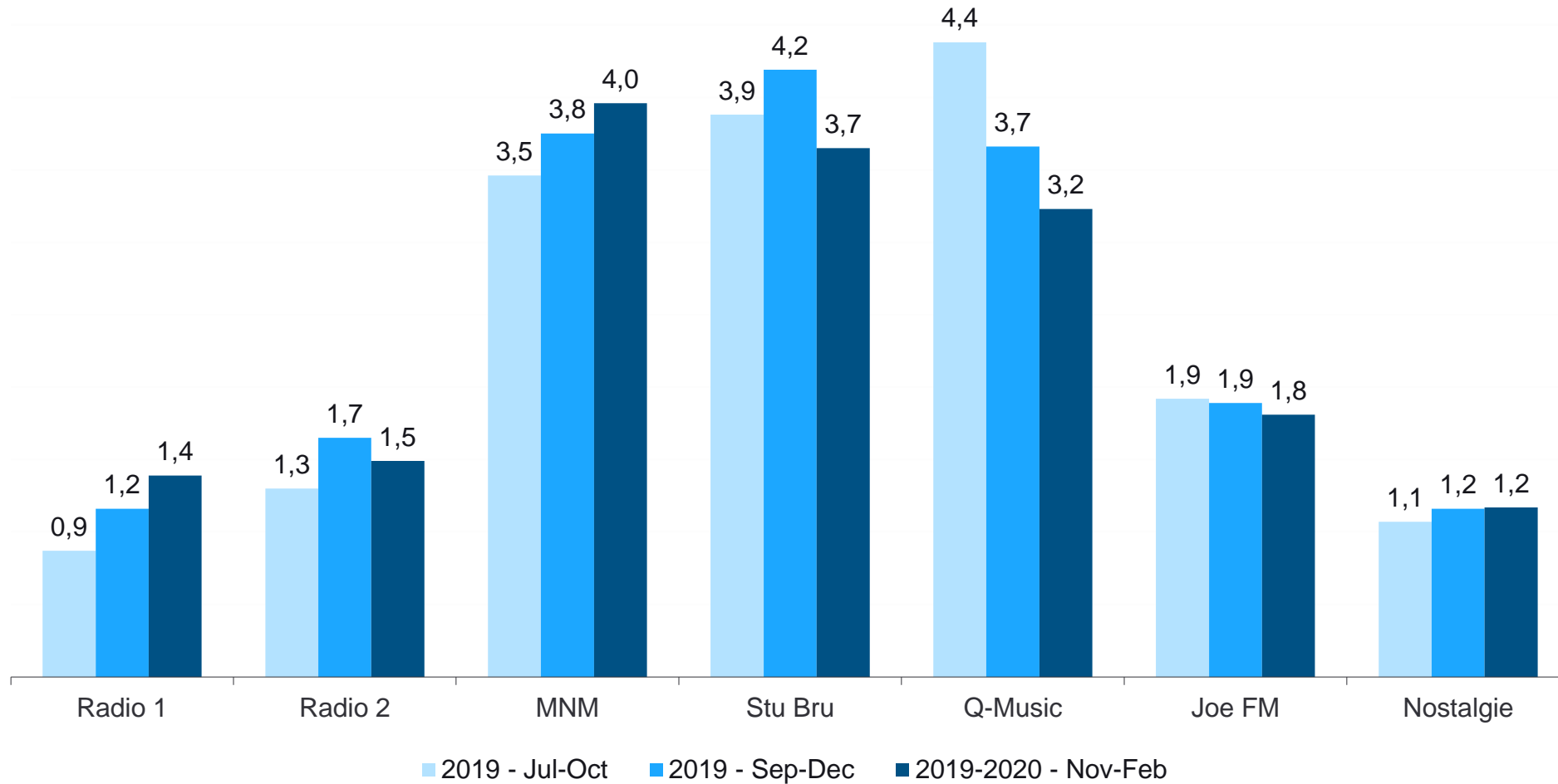
| Rank | Website | Monthly Net Reach # | Rank | Website | Monthly Net Reach # |
|------|-------------------------|---------------------|------|------------------------------|---------------------|
| 1 | HLN.be | 3.428.124 | 11 | Le Soir | 1.917.720 |
| 2 | Nieuwsblad | 3.162.012 | 12 | De Standaard | 1.739.136 |
| 3 | VRT | 2.569.896 | 13 | Flair | 1.628.508 |
| 4 | RTBF.be | 2.420.712 | 14 | Sudpresse Editions Digitales | 1.605.828 |
| 5 | Sudinfo | 2.267.076 | 15 | La Libre.be | 1.542.408 |
| 6 | 2dehands.be/2ememain.be | 2.265.228 | 16 | De Morgen | 1.519.728 |
| 7 | Knack/Levif | 2.218.272 | 17 | Gazet van Antwerpen | 1.453.200 |
| 8 | RTL.be | 2.143.428 | 18 | L'Avenir.net | 1.339.128 |
| 9 | Immoweb | 1.995.588 | 19 | Een | 1.243.956 |
| 10 | DH.be | 1.971.984 | 20 | Zimmo | 1.226.064 |



Key Radio figures

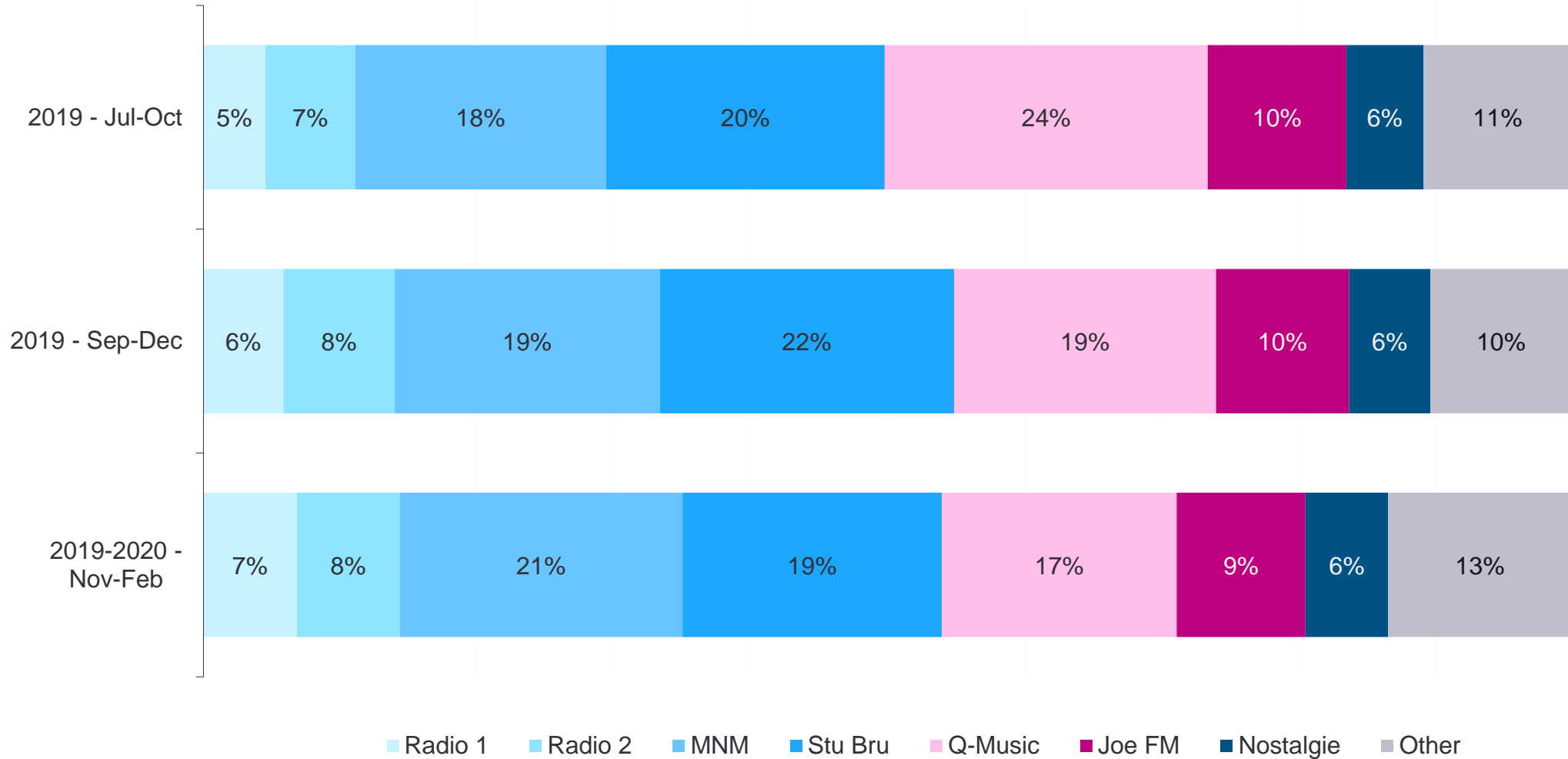
KEY RADIO FIGURES NORTH

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



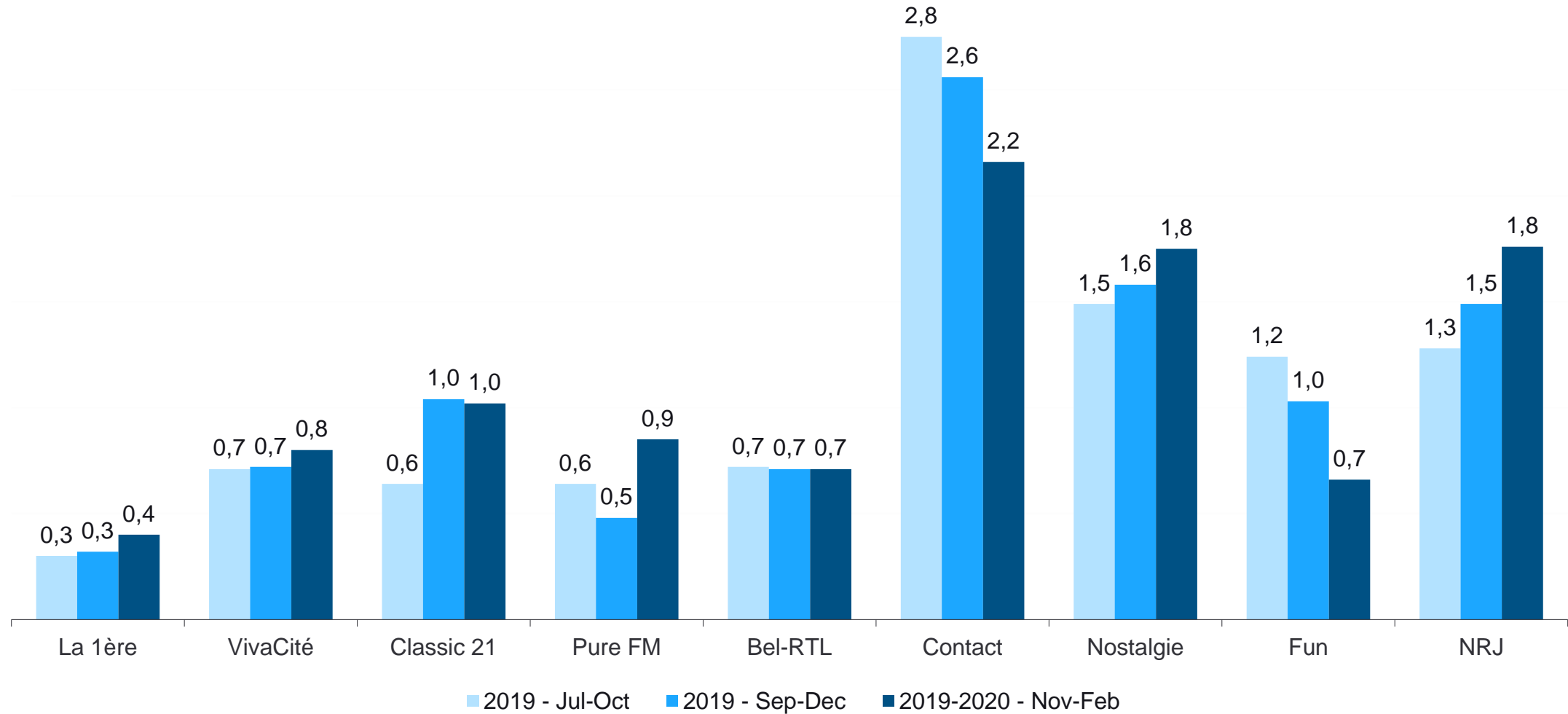
KEY RADIO FIGURES NORTH

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



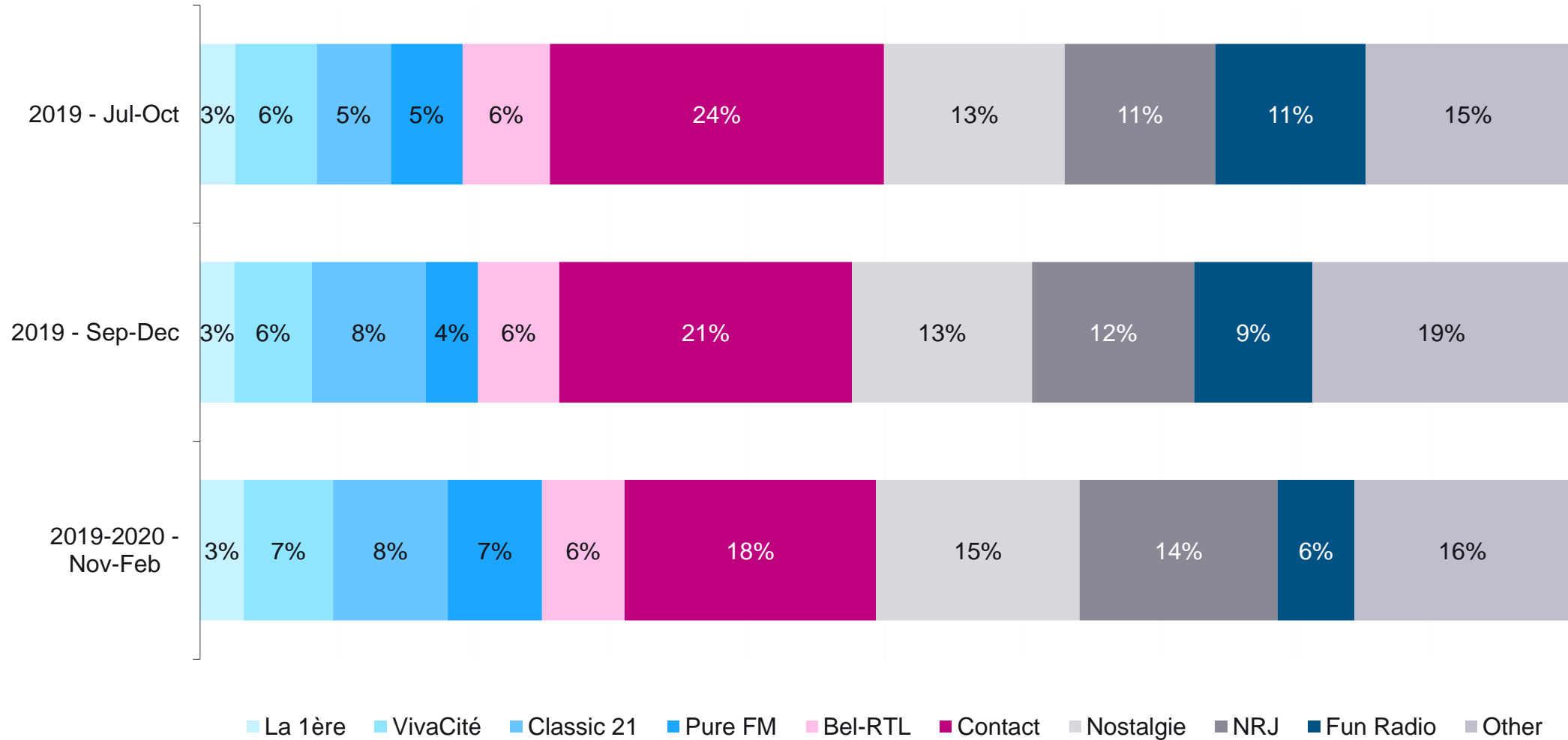
KEY RADIO FIGURES SOUTH

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 |

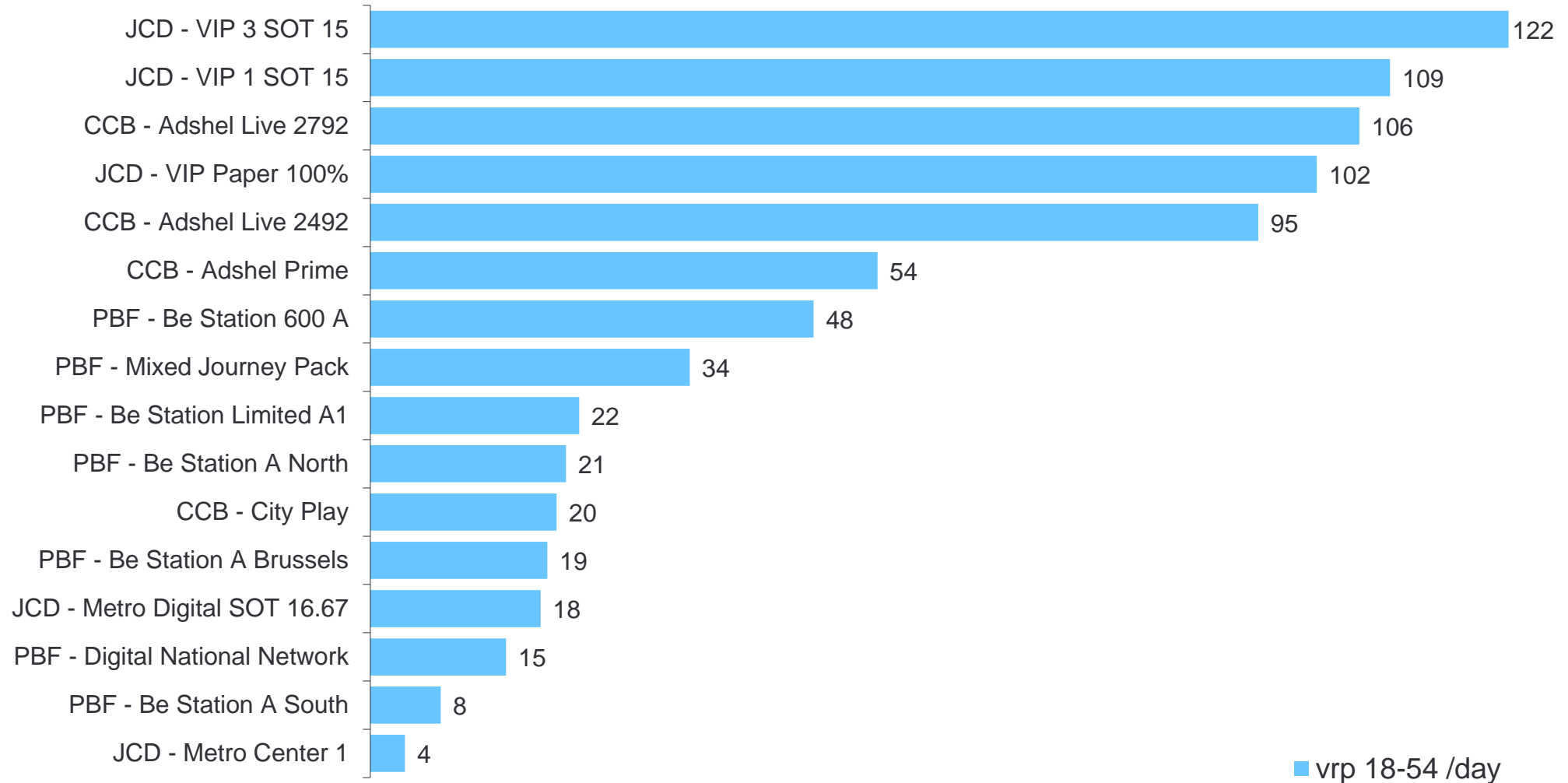
Key Print Figures - Magazines Circulation - Year 2019 (Paid + Free - digital sales included)

| 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

