



space

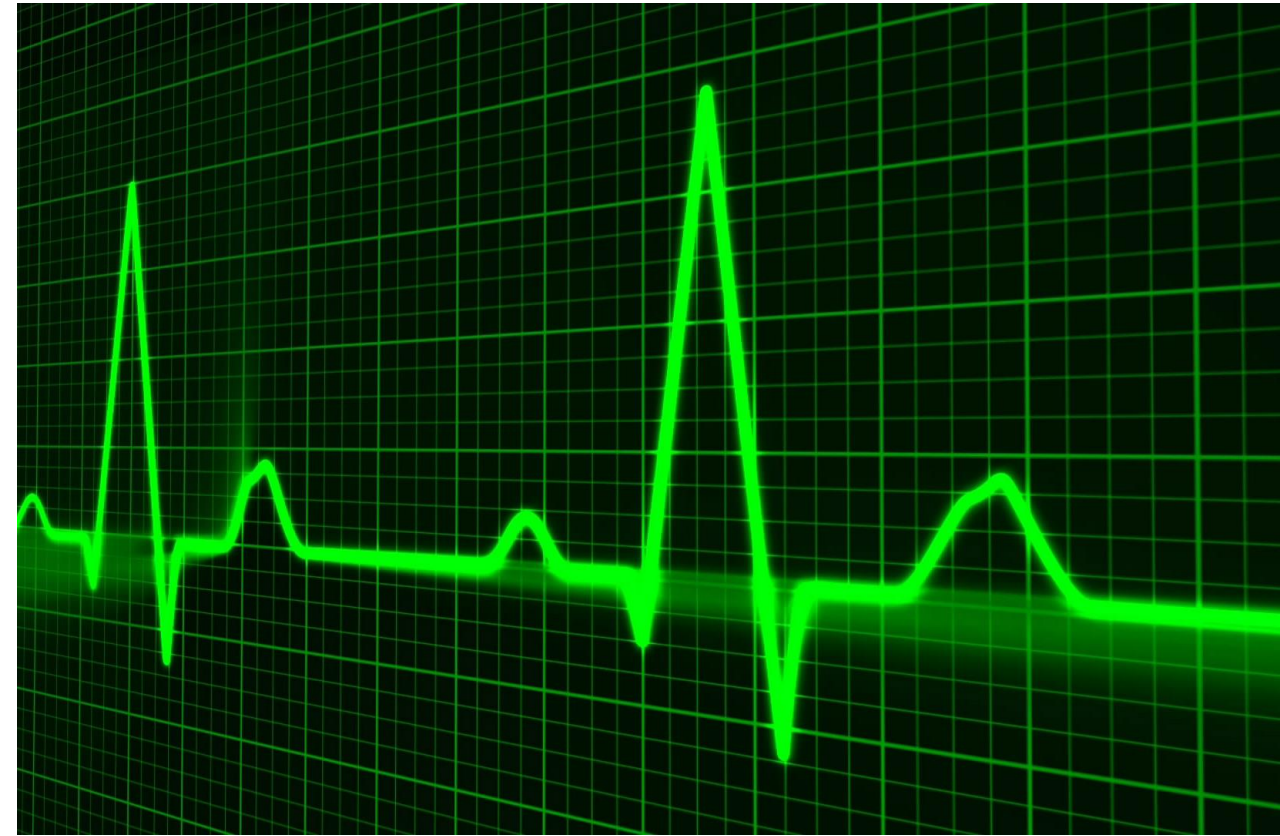
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

March 2020



Gross Media Investments Evolution

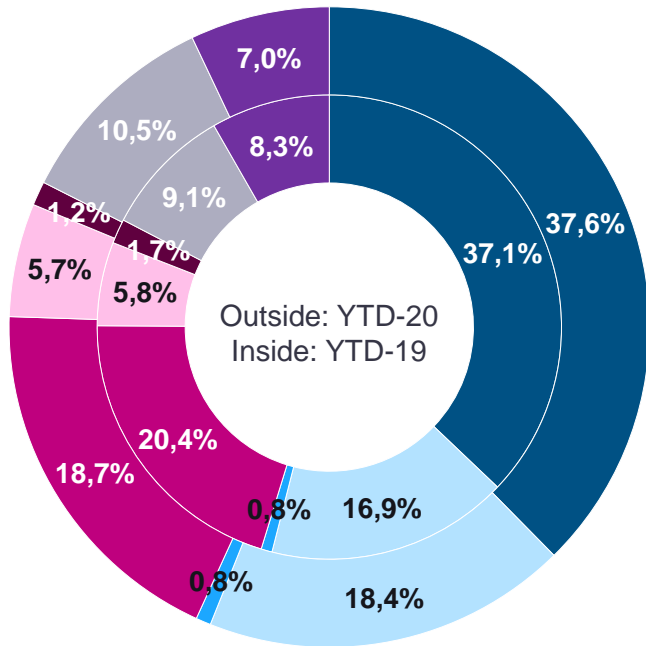
GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Feb 2020

NB : No Internet figures in MDB for 2019 & 2020

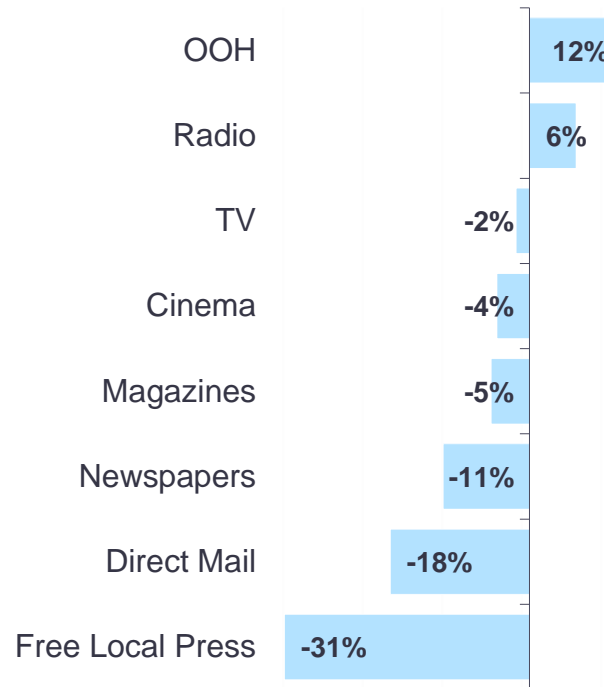
Market	National	North	South
<ul style="list-style-type: none"> ▪ € Mo ▪ vs YTD-19 ▪ % Region 	521,8 - 3,1% 100%	306,9 - 4,7% 59%	214,9 - 0,7% 41%

Media Mix Evol.

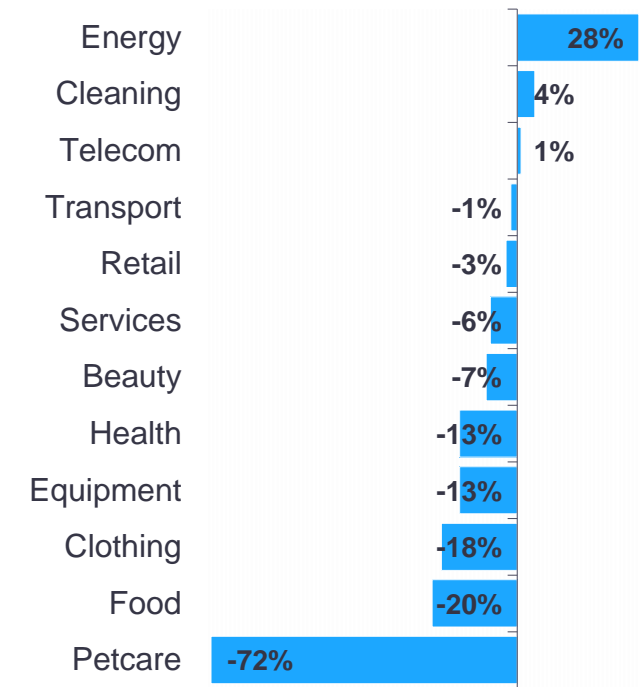
- TV
- Radio
- Cinema
- Newspapers
- Magazines
- Free Local Press
- OOH
- Direct Mail



Media Evol. (vs YTD-19)



EcoGroups Evol. (vs YTD-19)



MDB TOP 30 ADVERTISERS - Jan-Feb 2020

NB : No Internet figures in MDB for 2019 & 2020

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
1	D'IETEREN GROUP	17,4	↓ 81
2	COLRUYT GROUP	16,1	↑ 113
3	PROCTER & GAMBLE	14,2	↑ 122
4	PSA GROUPE	12,8	↓ 87
5	RENAULT-NISSAN ALLIANCE	10,5	↑ 171
6	AHOLD DELHAIZE	7,5	↓ 96
7	ALDI	6,8	↑ 551
8	ORANGE	6,1	↑ 153
9	TELENET GROUP HOLDING	5,5	↓ 86
10	PROXIMUS GROUP	4,6	↓ 63
11	THE COCA-COLA COMPANY	4,5	↓ 83
12	VINTED	4,4	↑ 116
13	LOTERIE NATIONALE	4,4	↑ 179
14	THE WALT DISNEY COMPANY	4,1	↑ 115
15	FIAT CHRYSLER AUTOMOBILES	4,0	↓ 77

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
16	RECKITT & BENCKISER	3,9	↓ 59
17	NETHYS	3,8	↑ 138
18	3I GROUP	3,7	↓ 91
19	FERRERO	3,6	↑ 112
20	UNILEVER	3,5	↔ 101
21	BELFIUS	3,4	↓ 75
22	ING GROUP	3,3	↑ 127
23	FORD MOTOR COMPANY	3,2	↑ 142
24	GROUPE 3 SUISSES	3,1	↑ 102
25	AS WATSON	3,0	↑ 122
26	AXA GROUP	2,9	↑ 314
27	TUI BELGIUM	2,8	↑ 145
28	JAGUAR LAND ROVER BELUX	2,8	↑ 157
29	L'OREAL GROUP	2,8	↓ 79
30	MONDELEZ INTERNATIONAL	2,7	↓ 96



Key TV figures

Key TV figures North - Mar-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Mar-20	YTD	Mar-20	YTD	Mar-20	YTD
VTM	PRP 18-54	9,5	7,8	28,1	26,0	710	664
Q2	PRP 18-44	1,8	1,7	6,2	6,7	758	674
VITAYA	PRP 18-54	1,3	1,3	3,8	4,4	627	476
CAZ	MEN 18-54	0,5	0,5	1,7	2,1	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	3,8	3,1	11,3	10,5	984	883
VIJF	PRP 18-54	1,9	1,7	5,7	5,8	803	673
ZES	PRP 18-54	0,7	0,6	2,0	2,1	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	33,9	29,9				
Total TV	PRP 18-44	29,7	25,9				
Total TV	MEN 18-54	27,8	24,7				

Key TV indexes North - Mar-20

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>C/GRP</u> vs Channel's Objective	
		Mar-20	YTD	Mar-20	YTD	Mar-20	YTD
VTM	PRP 18-54	↑ 129	↑ 103	↑ 108	↑ 102	✓ 76	✓ 91
Q2	PRP 18-44	↑ 103	↓ 90	↓ 86	↓ 91	✓ 88	✓ 100
VITAYA	PRP 18-54	↓ 92	↓ 92	↓ 78	↓ 91	✓ 71	✓ 70
CAZ	MEN 18-54	↓ 98	↓ 98	↓ 85	↓ 96	Package	Package
VIER	PRP 18-54	↔ 101	↓ 89	↓ 85	↓ 89	✓ 97	✗ 108
VIJF	PRP 18-54	↑ 102	↔ 101	↓ 85	↔ 99	✓ 94	✓ 99
ZES	PRP 18-54	↔ 99	↓ 94	↓ 83	↓ 92	Package	Package
Total TV	PRP 18-54	↑ 119	↔ 101				
Total TV	PRP 18-44	↑ 120	↔ 99				
Total TV	MEN 18-54	↑ 117	↑ 102				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Mar - 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	31,6%	31,9%	31,0%	32,9%	106
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	86,5%	84,2%	82,3%	80,7%	98
	VHS + DVD player + Blu-Ray	"	4,0%	3,5%	2,4%	2,0%	85
	Video on demand + Digital recorder	"	8,3%	10,8%	13,6%	15,9%	116
	Game console and other devices (3)	"	1,2%	1,5%	1,7%	1,4%	84
% Time shift viewing (4)	All Channels	"	25,0%	25,2%	30,3%	31,7%	105
	Main Channels (5)	"	27,9%	28,3%	33,7%	35,2%	104
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	87	88	87	86	
	Main channels (5) - TSV	"	28	34	34	36	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	117	116	104	107	104
	All TV channels (TSV)	"	33	33	36	39	109
	All TV channels (Live + TSV)	"	150	149	140	147	105
	Other TV Screen Usage	"	31	37	40	46	116
	Total TV Screen Usage	"	181	186	179	193	107

Key TV figures South - Mar-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Mar-20	YTD	Mar-20	YTD	Mar-20	YTD
RTL-TVI	PRP 18-54	9,0	7,2	29,2	26,1	697	662
Club-RTL	MEN 18-54	1,2	1,2	5,1	5,9	1.064	863
Plug-RTL	ALL 15-34	0,8	0,8	4,3	4,7	675	541
TF1	PRP 18-54	3,8	3,5	12,2	12,7	574	492
La Une	PRP 18-54	5,1	4,3	16,8	15,7	629	597
La Deux	PRP 18-54	1,5	1,5	5,0	5,5	683	540
AB3	PRP 18-44	1,7	2,0	6,4	8,3	824	714
TTV	PRP 18-54	30,6	27,5				
TTV	PRP 18-44	26,8	23,7				
TTV	ALL 15-34	17,9	15,8				
TTV	MEN 18-54	22,6	20,1				

Key TV indexes South - Mar-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			
		Mar-20		YTD		Mar-20		YTD		Mar-20		YTD	
RTL-TV1	PRP 18-54	↑	110	↓	89	↑	104	↓	94	✓	74	✓	90
Club-RTL	MEN 18-54	↓	78	↓	80	↓	78	↓	88	✗	106	✗	105
Plug-RTL	ALL 15-34	↑	128	↑	114	↑	119	↑	120	✓	80	✓	75
TF1	PRP 18-54	↑	102	↑	104	↓	97	↑	110	✓	73	✓	80
La Une	PRP 18-54	↑	130	↑	108	↑	123	↑	115	✓	81	✓	97
La Deux	PRP 18-54	↑	125	↑	114	↑	118	↑	120	✓	90	✓	91
AB3	PRP 18-44	↓	52	↓	67	↓	49	↓	71	✗	109	✗	118
TTV	PRP 18-54	↑	106	↓	95								
TTV	PRP 18-44	↑	106	↓	94								
TTV	ALL 15-34	↑	107	↓	94								
TTV	MEN 18-54	→	100	↓	91								

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Mar - 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	35,6%	35,3%	34,1%	35,2%	103
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	78,9%	76,5%	74,3%	68,3%	92
	VHS + DVD player + Blu-Ray	"	7,3%	6,6%	5,6%	3,5%	63
	Video on demand + Digital recorder	"	13,1%	16,1%	19,2%	26,9%	140
	Game console and other devices (3)	"	0,7%	0,8%	1,0%	1,3%	131
% Time shift viewing (4)	All Channels	"	17,5%	20,8%	21,8%	24,1%	110
	Main Channels (5)	"	19,2%	22,2%	22,4%	24,5%	109
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	90	88	89	88	
	Main channels (5) - TSV	"	51	49	52	50	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	154	144	134	123	92
	All TV channels (TSV)	"	28	30	30	32	106
	All TV channels (Live + TSV)	"	182	174	165	155	94
	Other TV Screen Usage	"	57	62	67	84	125
	Total TV Screen Usage	"	238	236	232	239	103



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 - Mar-20

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	2.137.113	11	Gazet van Antwerpen	374.866
2	Nieuwsblad	1.584.352	12	La Libre.be	372.186
3	VRT	827.049	13	Knack-Le Vif	317.296
4	Sudinfo	798.062	14	Het Belang van Limburg	300.847
5	RTBF.be	691.691	15	Sudpresse Editions Digitales	292.312
6	DH.be	602.041	16	L'Avenir.net	290.347
7	De Standaard	583.956	17	7sur7.be	285.383
8	RTL.be	551.406	18	2dehands.be-2ememain.be	278.389
9	Le Soir	548.210	19	Sporza	238.255
10	De Morgen	418.525	20	De Tijd	207.632

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

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

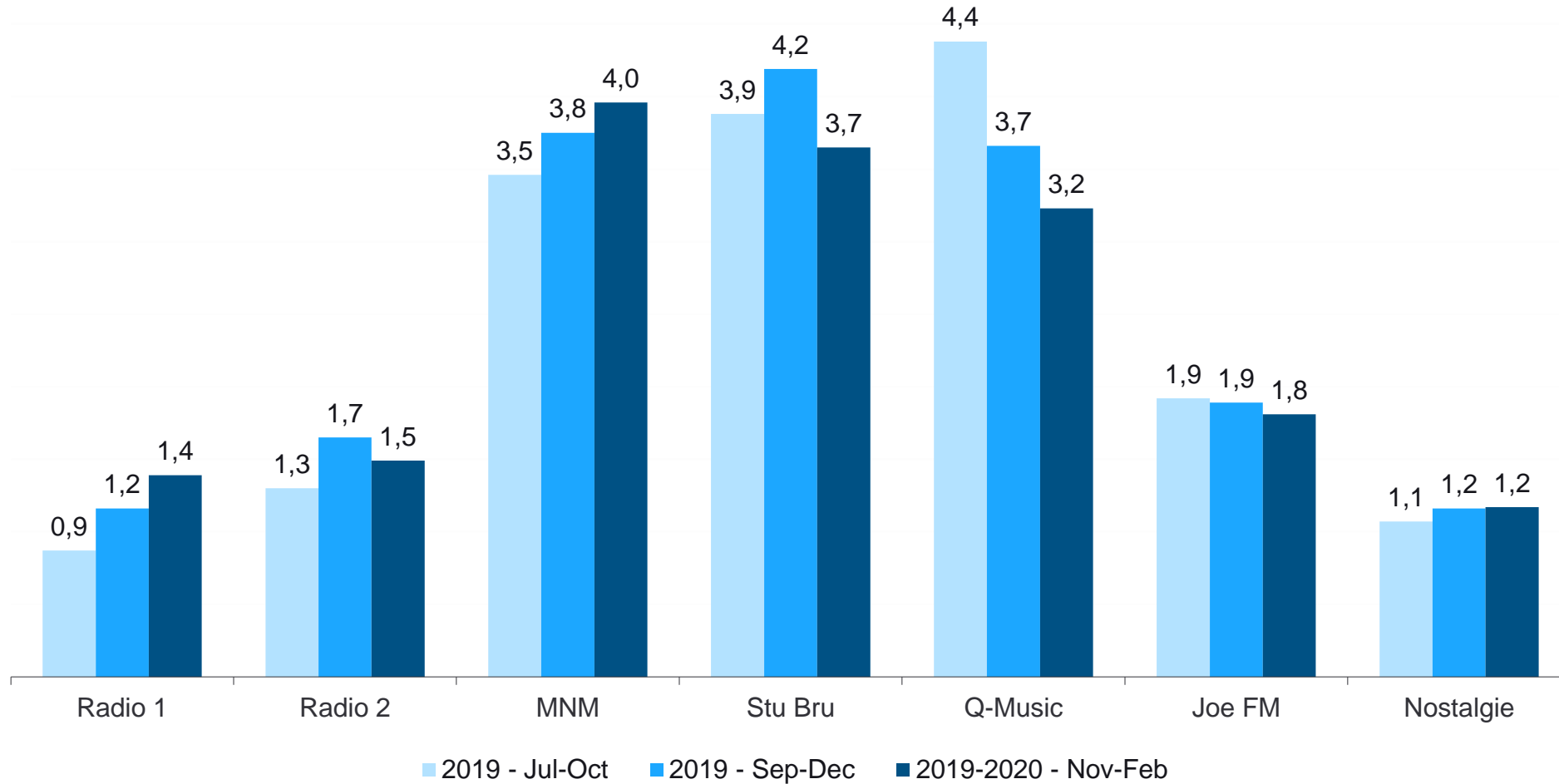
Website	Daily Visitors (000)
MSN.COM	1.022
GOOGLE.BE	1.012
MSN.BE	866
FACEBOOK.COM	657
LINKEDIN.COM	630
LIVE.COM	615
GOOGLE.COM	433
BING.COM	365
YOUTUBE.COM	327
YAHOO.COM	265



Key Radio figures

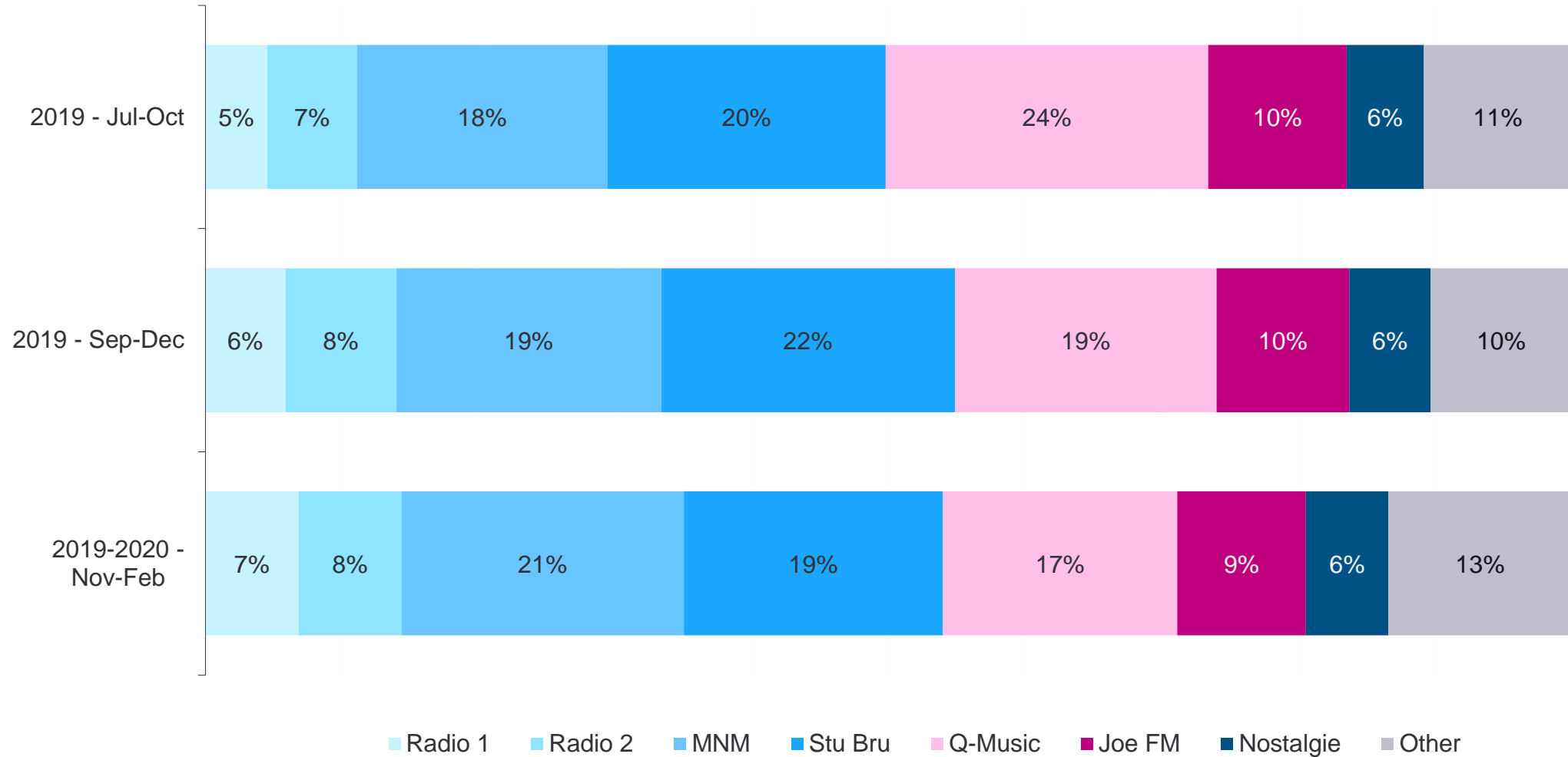
KEY RADIO FIGURES NORTH

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



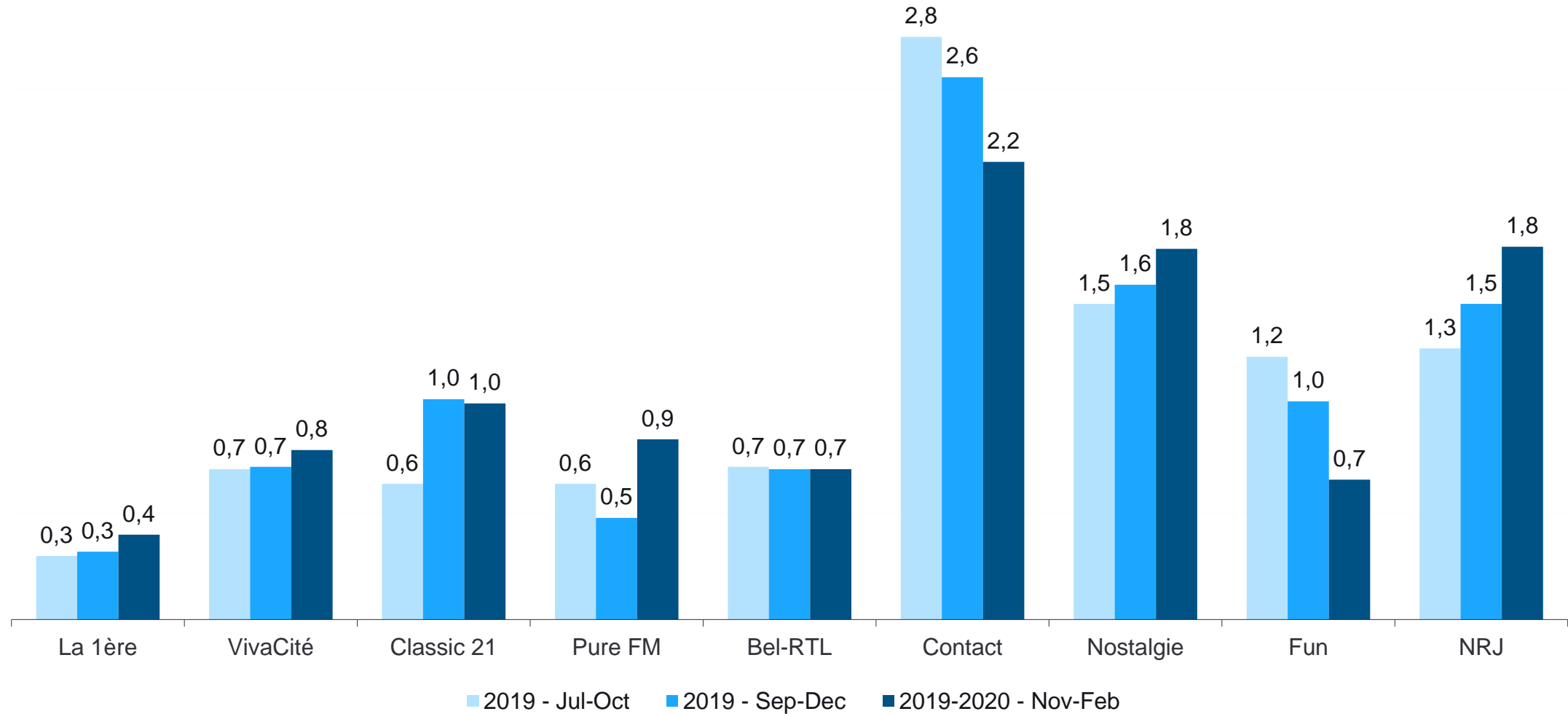
KEY RADIO FIGURES NORTH

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



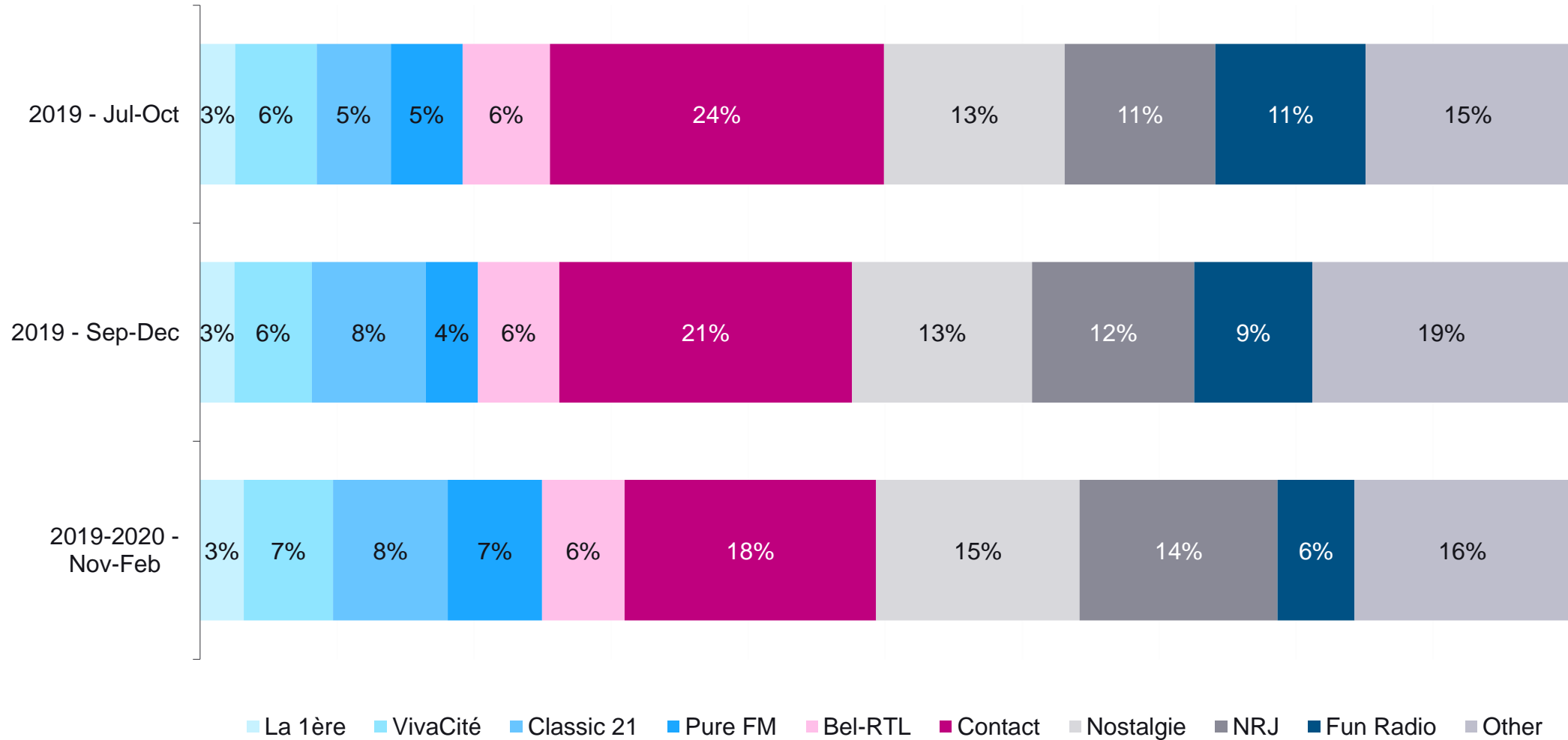
KEY RADIO FIGURES SOUTH

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

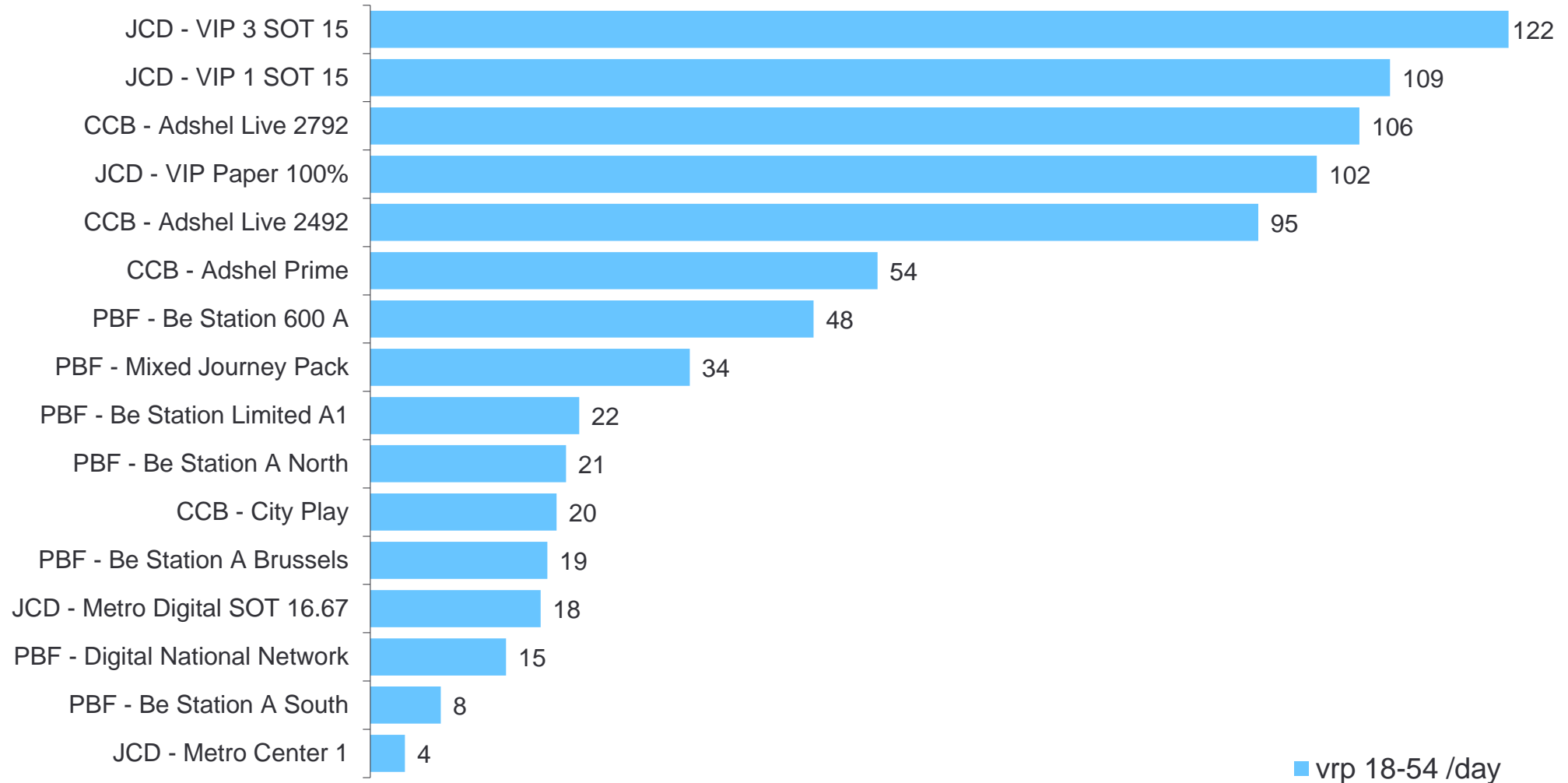
Key Print Figures - Magazines Circulation - Year 2019 (Paid + Free - digital sales included)

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

