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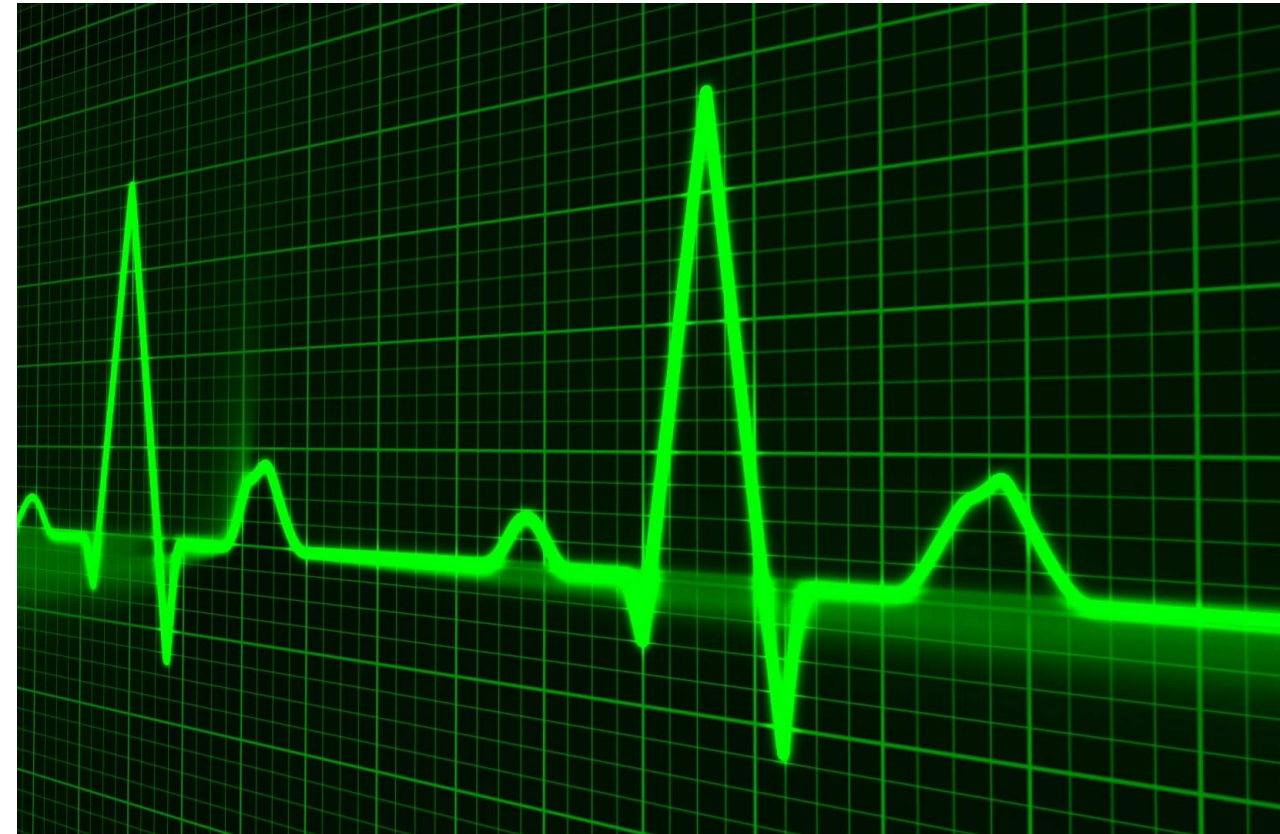
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

November 2022



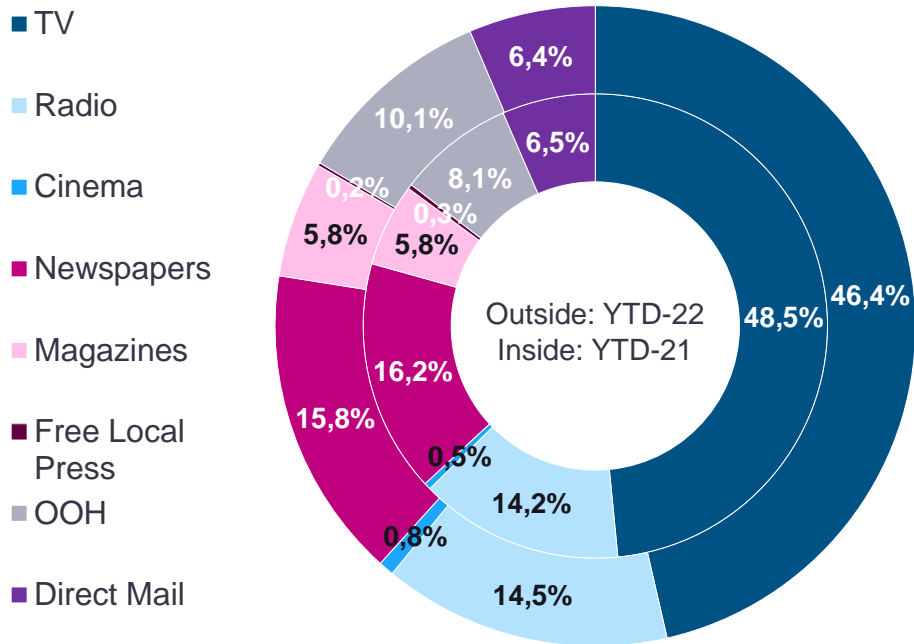
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Oct 2022

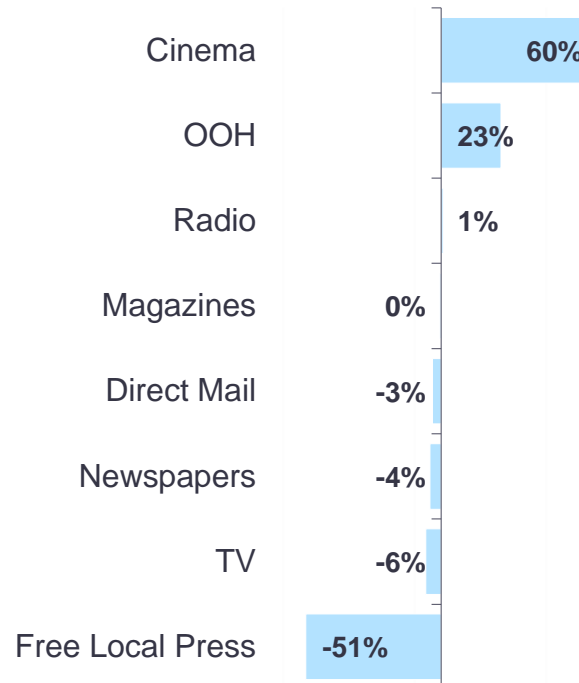
NB : No Internet figures in MDB universe

Market	National	North	South
<ul style="list-style-type: none"> ▪ € Mo ▪ vs YTD-21 ▪ % Region 	3.047,7 - 1,6% 100%	1.894,2 + 0,8% 62%	1.153,5 - 5,4% 38%

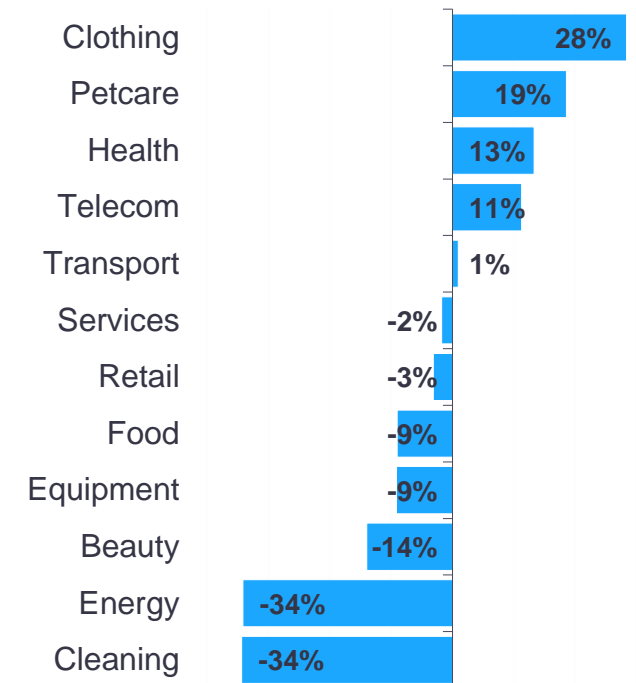
Media Mix Evol.



Media Evol. (vs YTD-21)



EcoGroups Evol. (vs YTD-21)



MDB TOP 30 ADVERTISERS - Jan-Oct 2022

NB : No Internet figures in MDB universe

Rank	ADV.GROUP	Gross Inv.	vs 2021
1	COLRUYT GROUP	102,6	↓ 85
2	PROCTER & GAMBLE BENELUX	83,5	↓ 69
3	AHOLD DELHAIZE	67,9	↓ 91
4	THE COCA-COLA COMPANY	59,3	↓ 88
5	D'IETEREN GROUP	46,6	↓ 94
6	PROXIMUS GROUP	41,2	↑ 127
7	TELENET GROUP HOLDING	38,6	↑ 108
8	CARREFOUR GROUP	36,0	↑ 170
9	RECKITT & BENCKISER	34,3	↓ 88
10	UNILEVER	33,4	↓ 67
11	STELLANTIS *	32,4	↑ 108
12	L'OREAL GROUP	30,2	↑ 105
13	ALDI	29,5	↑ 120
14	ORANGE	27,8	↑ 115
15	LOTERIE NATIONALE	27,4	↑ 104

Rank	ADV.GROUP	Gross Inv.	vs 2021
16	FERRERO	25,7	↓ 92
17	BMW GROUP BELGIUM	23,2	→ 100
18	AS WATSON	23,0	↓ 94
19	GROUPE 3 SUISES	20,9	↑ 113
20	RENAULT-NISSAN ALLIANCE	20,9	↓ 87
21	NETHYS	20,9	↓ 88
22	3I GROUP	18,7	↑ 206
23	THE WALT DISNEY COMPANY	18,3	↑ 122
24	LIDL & CO	18,2	↓ 85
25	BNP-PARIBAS	17,7	↑ 160
26	HENKEL	17,5	↑ 111
27	BELFIUS	17,1	↑ 110
28	MONDELEZ INTERNATIONAL	16,8	↓ 87
29	HELLOFRESH	15,6	↓ 85
30	NESTLE GROUP	15,3	↓ 64

* : PSA + FCA



Key TV figures

Key TV figures North - Nov-22

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Nov-22	YTD-22	Nov-22	YTD-22	Nov-22	YTD-22
VTM	PRP 18-54	6,2	6,0	27,0	26,8	34,0	299,2
VTM2	PRP 18-54	1,3	1,4	5,7	6,3	7,4	69,9
VTM3	PRP 18-54	0,9	0,8	3,7	3,7	3,7	36,7
VTM4	MEN 18-54	0,5	0,5	2,5	2,7	5,8	36,5
Play4	PRP 18-54	2,2	2,4	9,7	10,8	15,4	149,6
Play5	PRP 18-54	0,9	0,9	3,8	3,8	7,4	59,8
Play6	PRP 18-54	0,4	0,4	1,5	1,9	8,8	66,9
Total TV	PRP 18-54	23,0	22,3				
Total TV	MEN 18-54	19,0	18,3				

Key TV indexes North - Nov-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	
		Nov-22	YTD-22	Nov-22	YTD-22	Nov-22	YTD-22
VTM	PRP 18-54	↓ 82	→ 100	↘ 99	↑ 107	↓ 89	↓ 85
VTM2	PRP 18-54	↓ 71	↓ 98	↓ 86	↑ 105	↓ 64	↓ 76
VTM3	PRP 18-54	↑ 104	↓ 98	↑ 124	↑ 105	↓ 54	↓ 69
VTM4	MEN 18-54	↓ 57	↓ 84	↓ 68	↓ 92	↑ 179	↑ 110
Play4	PRP 18-54	↓ 54	↓ 86	↓ 64	↓ 92	↓ 70	↓ 88
Play5	PRP 18-54	↓ 85	↓ 84	↑ 102	↓ 90	↑ 142	→ 100
Play6	PRP 18-54	↓ 57	↓ 77	↓ 69	↓ 84	↑ 206	↑ 173
Total TV	PRP 18-54	↓ 83	↓ 93				
Total TV	MEN 18-54	↓ 83	↓ 92				

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-19	YTD-20	YTD-21	YTD-22	22 vs 21
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	28,0%	30,9%	28,6%	27,1%	95
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	81,4%	79,0%	73,1%	70,9%	97
	Video on demand + Digital recorder	"	14,5%	17,3%	24,4%	28,5%	117
% Time shift viewing (4)	All Channels	"	29,2%	32,5%	34,2%	36,1%	106
	Main Channels (5)	"	33,3%	36,5%	39,3%	41,4%	105
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	85	84	80	82	
	Main channels (5) - TSV	"	34	36	35	41	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	96	98	81	73	90
	All TV channels (TSV)	"	32	37	34	32	94
	All TV channels (Live + TSV)	"	127	136	115	105	91
	Other TV Screen Usage	"	38	47	54	55	102
	Total TV Screen Usage	"	165	183	169	160	95

Key TV figures South - Nov-22

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Nov-22	YTD-22	Nov-22	YTD-22	Nov-22	YTD-22
RTL-TV1	PRP 18-54	4,7	4,8	21,9	24,8	25,2	207,2
Club-RTL	MEN 18-54	0,7	0,9	4,3	6,0	3,4	29,8
Plug-RTL	ALL 15-34	0,3	0,4	2,8	4,7	2,2	18,9
TF1	PRP 18-54	3,1	2,4	14,4	12,6	5,8	53,6
La Une	PRP 18-54	3,1	2,8	14,4	14,3	11,6	93,3
Tipik	PRP 18-54	2,4	1,1	11,4	5,6	5,0	25,9
AB3	PRP 18-44	0,9	1,0	5,2	6,3	4,6	28,8
TTV	PRP 18-54	21,2	19,4				
TTV	PRP 18-44	16,7	15,7				
TTV	ALL 15-34	10,0	9,3				
TTV	MEN 18-54	17,0	14,7				

Key TV indexes South - Nov-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	
		Nov-22	YTD-22	Nov-22	YTD-22	Nov-22	YTD-22
RTL-TVI	PRP 18-54	↓ 72	↓ 88	↓ 82	→ 100	↓ 81	↓ 82
Club-RTL	MEN 18-54	↓ 83	↓ 90	↓ 86	↑ 104	↓ 73	↓ 80
Plug-RTL	ALL 15-34	↓ 47	↓ 88	↓ 58	↑ 109	↓ 95	↓ 91
TF1	PRP 18-54	↓ 96	↓ 88	↑ 109	→ 100	↓ 83	↓ 90
La Une	PRP 18-54	↓ 90	↓ 75	↑ 102	↓ 85	→ 101	↓ 92
Tipik	PRP 18-54	↑ 188	↓ 74	↑ 213	↓ 83	↑ 156	↓ 76
AB3	PRP 18-44	↓ 64	↓ 81	↓ 78	↓ 94	↑ 131	↑ 109
TTV	PRP 18-54	↓ 88	↓ 88				
TTV	PRP 18-44	↓ 82	↓ 87				
TTV	ALL 15-34	↓ 81	↓ 80				
TTV	MEN 18-54	↓ 97	↓ 87				

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-19	YTD-20	YTD-21	YTD-22	22 vs 21
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	31,0%	33,4%	30,6%	28,8%	94
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	71,6%	67,2%	63,5%	59,4%	93
	Video on demand + Digital recorder	"	22,3%	27,6%	33,8%	40,3%	119
% Time shift viewing (4)	All Channels	"	21,9%	24,2%	26,1%	25,6%	98
	Main Channels (5)	"	22,5%	24,5%	26,6%	26,9%	101
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	86	88	86	86	
	Main channels (5) - TSV	"	50	51	54	55	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	121	117	98	89	90
	All TV channels (TSV)	"	28	30	28	25	87
	All TV channels (Live + TSV)	"	148	147	126	113	90
	Other TV Screen Usage	"	68	85	84	90	107
	Total TV Screen Usage	"	216	232	211	204	97



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Nov-22

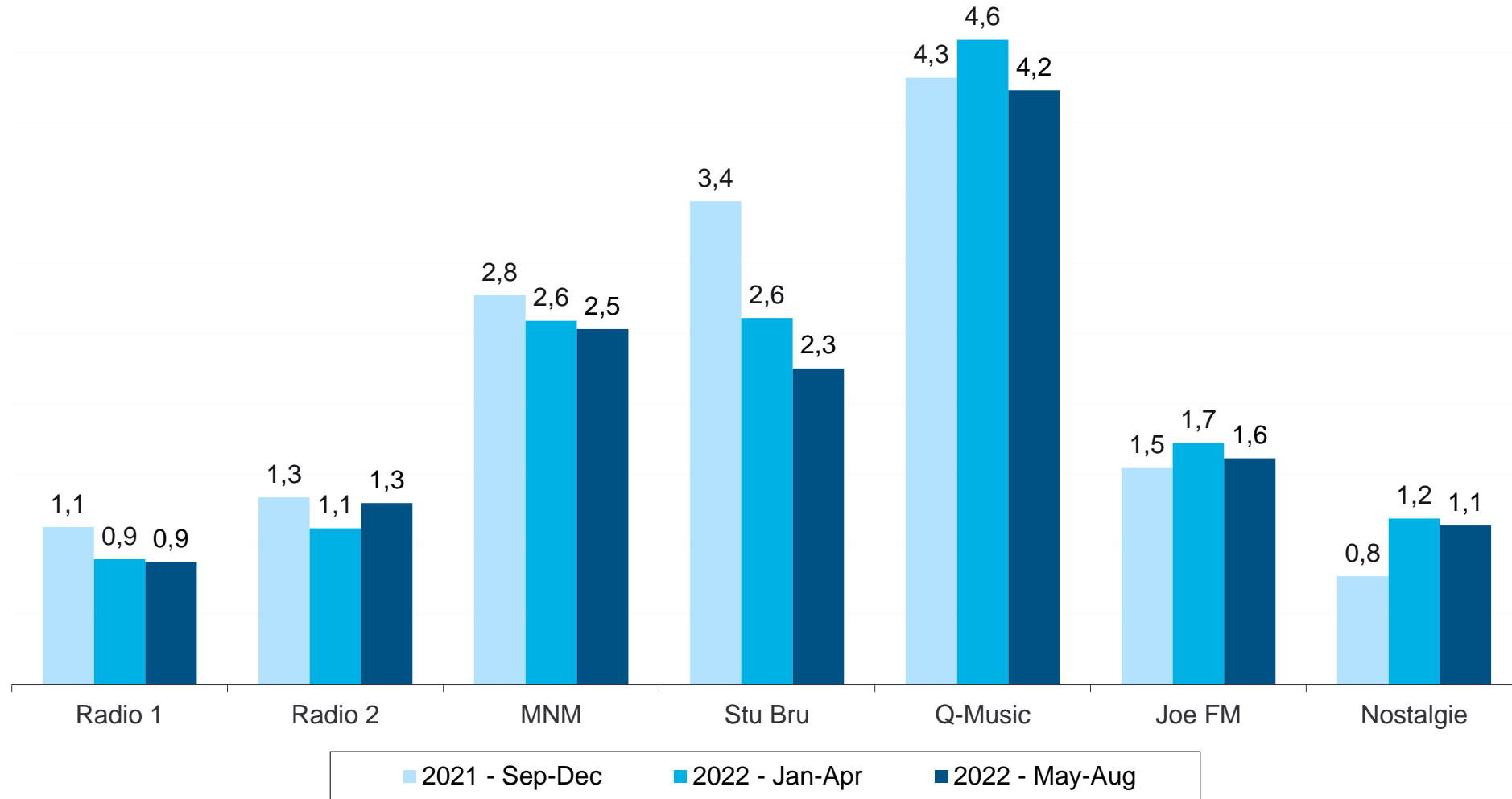
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.092.712	11	L'Avenir.net	1.506.120
2	Nieuwsblad	2.685.144	12	Immoweb	1.478.568
3	Sudinfo	2.219.448	13	De Morgen	1.440.264
4	VRT	2.171.064	14	Sporza	1.399.188
5	RTBF.be	1.945.944	15	La Libre.be	1.336.524
6	RTL.be	1.782.144	16	Knack/Le Vif	1.302.168
7	Le Soir	1.714.944	17	Humo The Wild Site	1.281.756
8	DH.be	1.708.560	18	De Standaard	1.277.136
9	2dehands.be/2ememain.be	1.704.696	19	7sur7.be	1.176.672
10	Gazet van Antwerpen	1.684.284	20	Metrotime	1.139.124



Key Radio figures

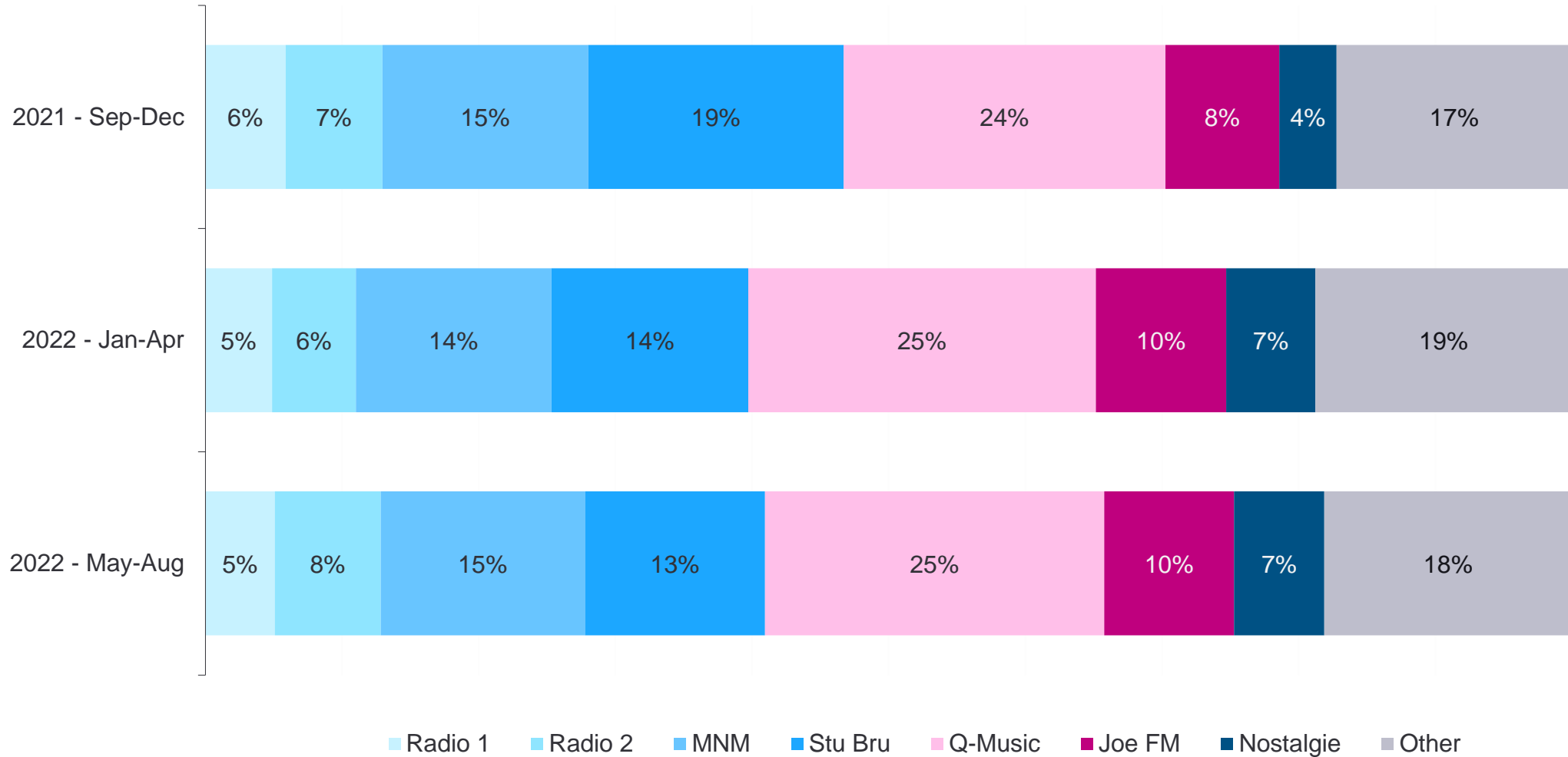
KEY RADIO FIGURES NORTH

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



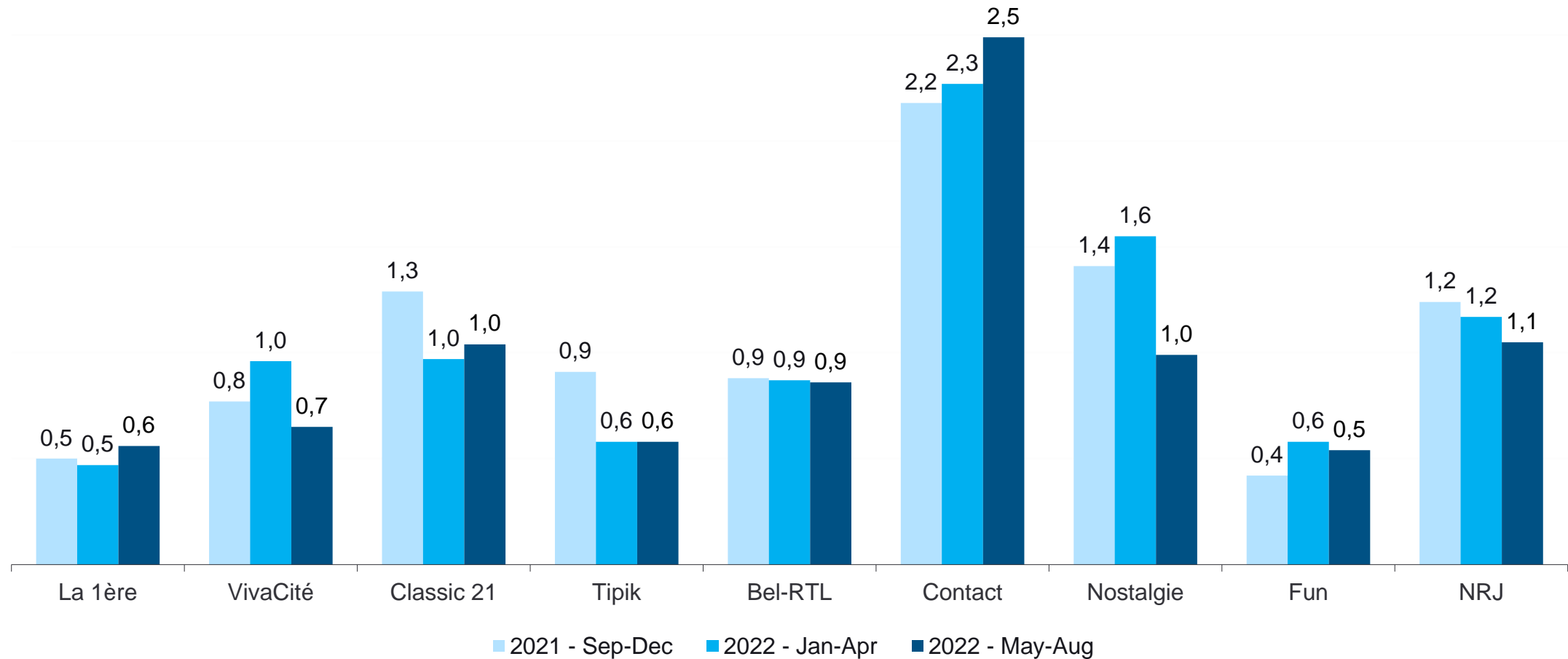
KEY RADIO FIGURES NORTH

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



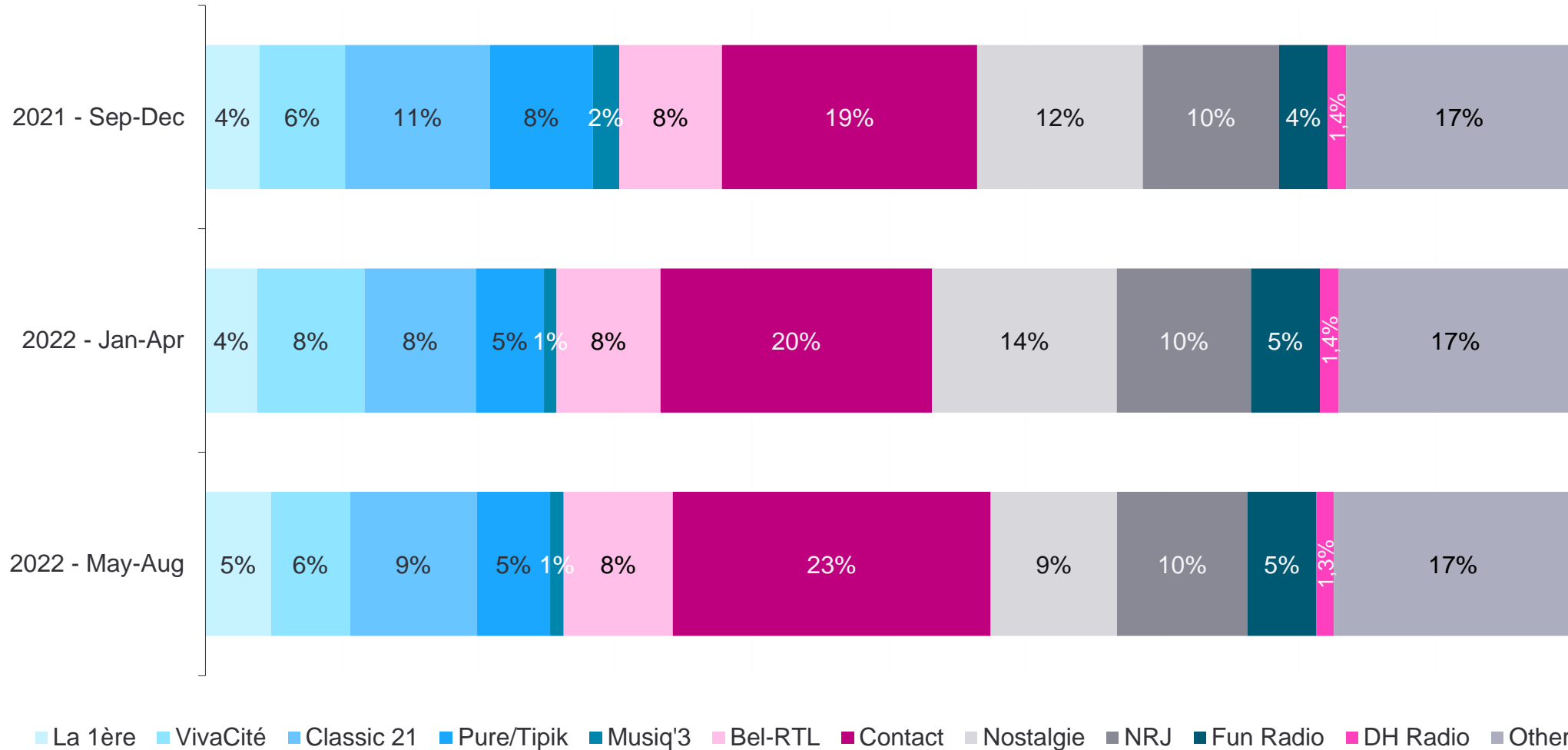
KEY RADIO FIGURES SOUTH

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

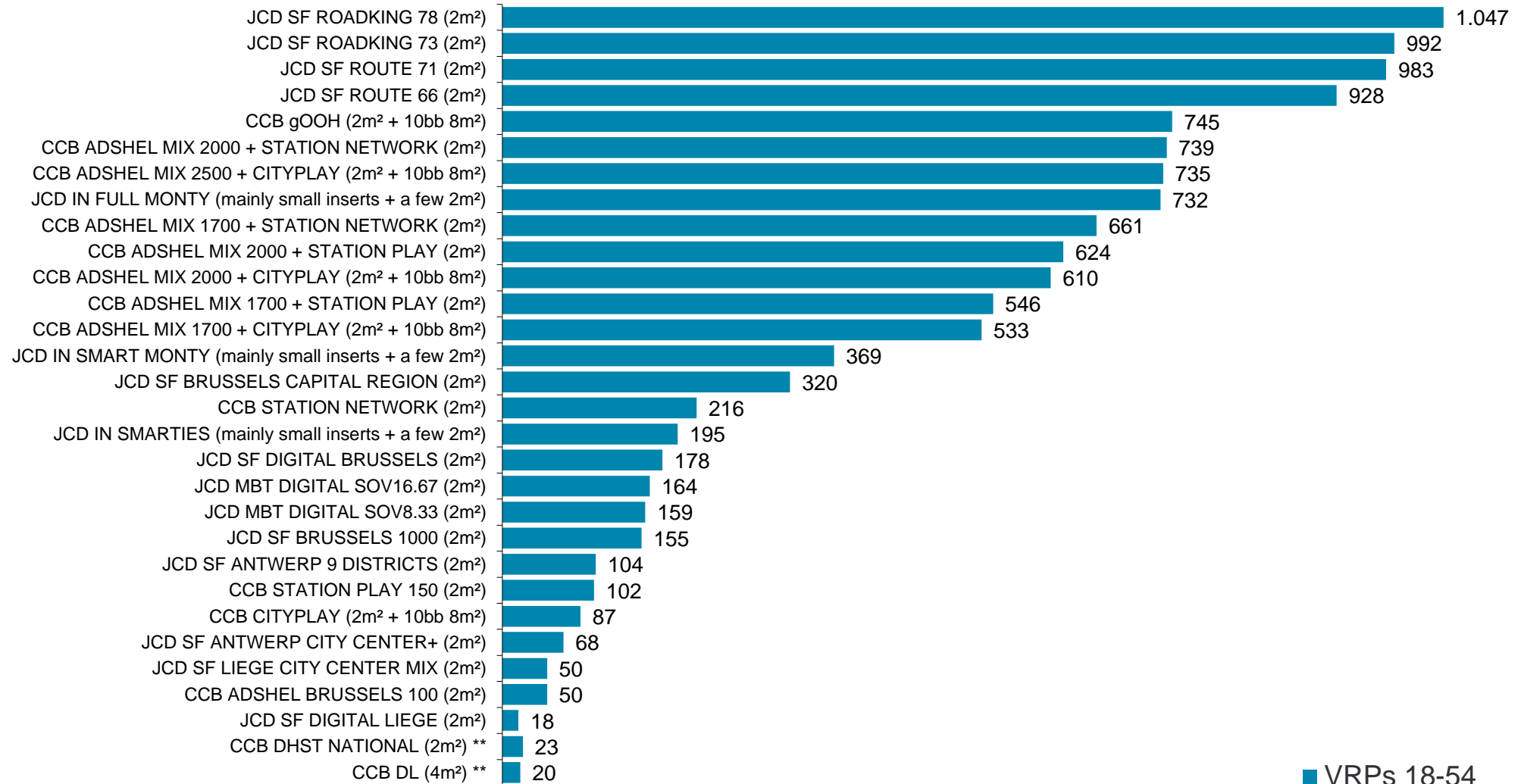
Key Print Figures - Magazines Circulation - Year 2021 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages		TOTAL	
	Circulation	vs 2020	Circulation	vs 2020	Circulation	vs 2020	Circulation	vs 2020
Television	539.671	↓ 94	328.592	↓ 95			868.263	↓ 94
Women	290.956	↓ 94	121.574	↓ 92			412.530	↓ 94
Lifestyle Culture & Travel	115.148	↑ 101	65.710	↓ 96	188.696	↑ 102	369.554	↑ 101
Business & News	97.536	↓ 95	125.958	↓ 98	44.578	↑ 103	268.072	↓ 98
Generation (Youth/Senior)			12.816	↓ 95	116.634	↑ 102	129.450	↑ 101
Men	21.772	↓ 93	11.159	↓ 94	32.231	↑ 105	65.162	↓ 99
Build & Deco	37.360	↓ 84	17.043	↓ 79	9.320	↓ 92	63.723	↓ 84
TOTAL	1.102.443	↓ 95	682.852	↓ 95	391.459	↑ 102	2.176.754	↓ 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

