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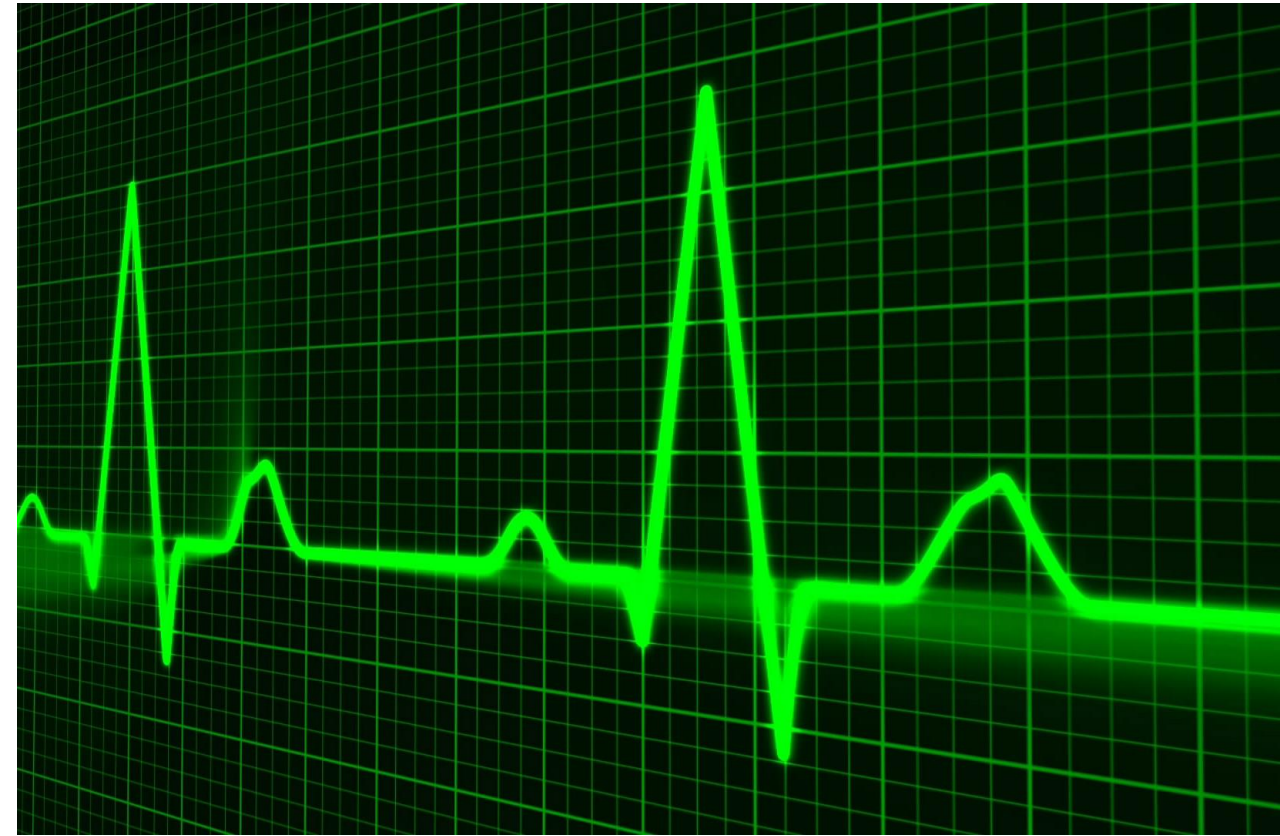
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

March 2021



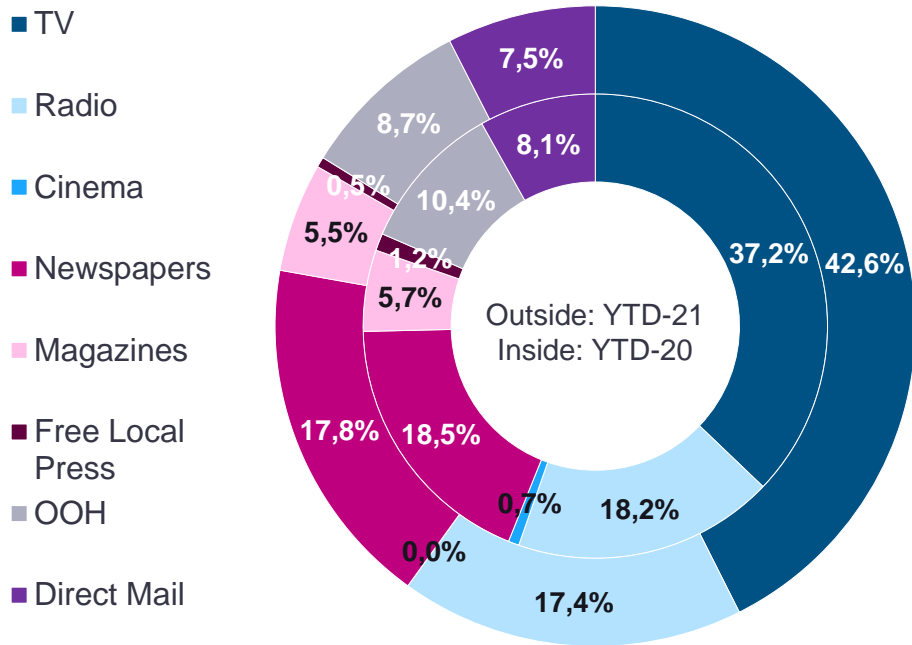
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Feb 2021

NB : No Internet figures in MDB for 2020 & 2021

Market	National	North	South
<ul style="list-style-type: none"> ▪ € Mo ▪ vs YTD-20 ▪ % Region 	489,5 - 7,4% 100%	288,3 - 7,0% 59%	201,2 - 7,9% 41%

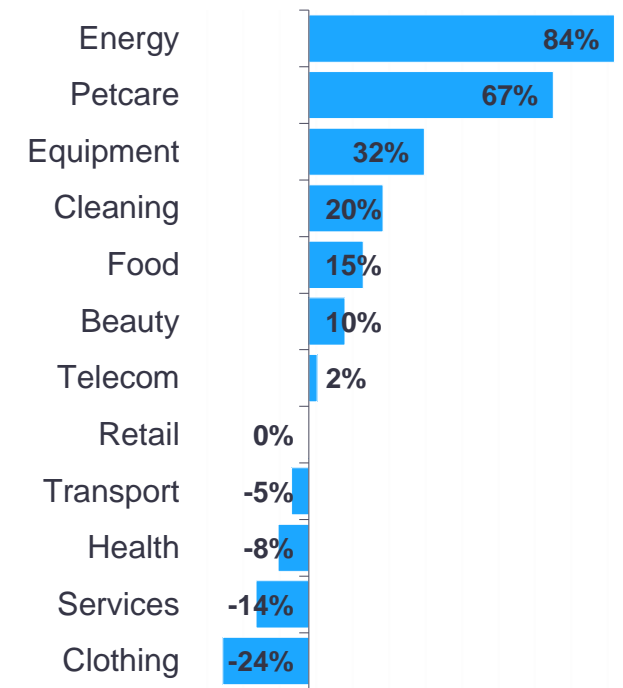
Media Mix Evol.



Media Evol. (vs YTD-20)



EcoGroups Evol. (vs YTD-20)



MDB TOP 30 ADVERTISERS - Jan-Feb 2021

NB : No Internet figures in MDB for 2020 & 2021

Rank	ADV.GROUP	Gross Inv.	vs 2020
1	COLRUYT GROUP	19,2	↑ 119
2	D'IETEREN GROUP	17,2	↔ 99
3	PROCTER & GAMBLE	16,8	↑ 118
4	PSA GROUP	12,3	↓ 96
5	AHOLD DELHAIZE	10,3	↑ 134
6	RENAULT-NISSAN ALLIANCE	9,0	↓ 86
7	THE COCA-COLA COMPANY	7,6	↑ 167
8	TELENET GROUP HOLDING	6,2	↑ 112
9	PROXIMUS GROUP	5,7	↑ 125
10	BMW GROUP BELGIUM	5,3	↑ 232
11	RECKITT & BENCKISER	5,1	↑ 129
12	VINTED	4,5	↑ 102
13	ENGIE	4,5	↑ 496
14	L'OREAL GROUP	4,3	↑ 155
15	LOTTERIE NATIONALE	4,3	↓ 98

Rank	ADV.GROUP	Gross Inv.	vs 2020
16	HENKEL	4,0	↑ 178
17	AS WATSON	3,9	↑ 118
18	ORANGE	3,7	↓ 60
19	UNILEVER	3,5	↔ 100
20	LIDL & CO	3,4	↑ 155
21	NETHYS	3,3	↓ 88
22	FORD MOTOR COMPANY	3,2	↔ 101
23	FERRERO	3,1	↓ 88
24	PEPSICO	3,1	↑ 114
25	TOYOTA BELGIUM	3,1	↑ 346
26	CARREFOUR GROUP	3,0	↓ 86
27	GROUPE 3 SUISES	3,0	↓ 82
28	DAIMLER BENZ GROUP	2,9	↑ 138
29	MONDELEZ INTERNATIONAL	2,9	↑ 107
30	HELLOFRESH	2,8	↑ 179



Key TV figures

Key TV figures North - Mar-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Mar-21	YTD	Mar-21	YTD	Mar-21	YTD
VTM	PRP 18-54	7,4	7,0	28,1	25,6	1.034	806
VTM2	PRP 18-54	1,6	1,6	6,0	5,9	1.029	802
VTM3	PRP 18-54	1,0	1,1	3,9	4,1	971	701
VTM4	MEN 18-54	0,5	0,6	2,2	2,6	<i>Package</i>	<i>Package</i>
Play4	PRP 18-54	3,2	3,3	12,1	11,9	1.290	944
Play5	PRP 18-54	1,3	1,3	4,9	4,6	1.010	899
Play6	PRP 18-54	0,6	0,6	2,3	2,3	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	26,3	27,4				
Total TV	MEN 18-54	21,0	22,2				

Key TV indexes North - Mar-21

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-21	YTD	Mar-21	YTD	Mar-21	YTD
VTM	PRP 18-54	↓ 78	↓ 90	→ 100	↓ 98	✗ 117	✗ 111
VTM2	PRP 18-54	↓ 87	↓ 94	↑ 112	↑ 103	✗ 116	✗ 110
VTM3	PRP 18-54	↓ 80	↓ 85	↑ 102	↓ 93	✗ 133	✗ 117
VTM4	MEN 18-54	↓ 98	↑ 110	↑ 130	↑ 123	Package	Package
Play4	PRP 18-54	↓ 83	↑ 104	↑ 108	↑ 113	✗ 128	✗ 115
Play5	PRP 18-54	↓ 67	↓ 73	↓ 86	↓ 80	✗ 121	✗ 133
Play6	PRP 18-54	↓ 88	↑ 102	↑ 114	↑ 111	Package	Package
Total TV	PRP 18-54	↓ 78	↓ 92				
Total TV	MEN 18-54	↓ 76	↓ 90				

Warning : In March 2020 the ratings were exceptionally high (due to the first lockdown and the need for information). The indexes should therefore be interpreted with great caution. Corollary: the costs per grp were exceptionally low.

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	21 vs 20
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	31,9%	31,0%	32,9%	32,3%	98
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	84,2%	82,3%	80,7%	73,7%	91
	VHS + DVD player + Blu-Ray	"	3,5%	2,4%	2,0%	2,4%	117
	Video on demand + Digital recorder	"	10,8%	13,6%	15,9%	22,5%	141
	Game console and other devices (3)	"	1,5%	1,7%	1,4%	1,3%	95
% Time shift viewing (4)	All Channels	"	25,2%	30,3%	31,7%	33,0%	104
	Main Channels (5)	"	28,3%	33,7%	35,2%	36,9%	105
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	87	86	83	
	Main channels (5) - TSV	"	34	34	36	37	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	116	104	107	90	84
	All TV channels (TSV)	"	33	36	39	37	95
	All TV channels (Live + TSV)	"	149	140	147	127	87
	Other TV Screen Usage	"	37	40	46	59	127
	Total TV Screen Usage	"	186	179	193	186	96

Warning : In March 2020 the ratings were exceptionally high (due to the first lockdown and the need for information). The indexes should therefore be interpreted with great caution.

Key TV figures South - Mar-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Mar-21	YTD	Mar-21	YTD	Mar-21	YTD
RTL-TVI	PRP 18-54	6,3	6,5	26,2	26,2	1.047	814
Club-RTL	MEN 18-54	1,1	1,1	5,7	5,6	1.374	877
Plug-RTL	ALL 15-34	0,6	0,6	4,8	4,9	745	679
TF1	PRP 18-54	3,1	3,1	12,7	12,5	832	636
La Une	PRP 18-54	4,4	4,3	18,1	17,3	878	663
Tipik	PRP 18-54	1,2	1,3	5,0	5,2	844	646
AB3	PRP 18-44	1,3	1,2	6,8	6,0	650	658
TTV	PRP 18-54	24,1	24,7				
TTV	PRP 18-44	19,6	19,4				
TTV	ALL 15-34	13,4	12,9				
TTV	MEN 18-54	18,6	19,0				

Key TV indexes South - Mar-21

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-21	YTD	Mar-21	YTD	Mar-21	YTD
RTL-TVI	PRP 18-54	↓ 71	↓ 90	↓ 90	→ 100	✗ 111	✗ 112
Club-RTL	MEN 18-54	↓ 91	↓ 89	↑ 111	↓ 94	✗ 135	✗ 108
Plug-RTL	ALL 15-34	↓ 81	↓ 85	↑ 110	↑ 105	✓ 75	✓ 89
TF1	PRP 18-54	↓ 81	↓ 89	↑ 103	→ 99	✗ 110	✗ 107
La Une	PRP 18-54	↓ 85	→ 100	↑ 108	↑ 111	✗ 109	✗ 103
Tipik	PRP 18-54	↓ 78	↓ 85	→ 100	↓ 94	✗ 126	✗ 117
AB3	PRP 18-44	↓ 78	↓ 59	↑ 106	↓ 72	✓ 87	✗ 111
TTV	PRP 18-54	↓ 79	↓ 90				
TTV	PRP 18-44	↓ 73	↓ 82				
TTV	ALL 15-34	↓ 75	↓ 81				
TTV	MEN 18-54	↓ 82	↓ 94				

Warning : In March 2020 the ratings were exceptionally high (due to the first lockdown and the need for information). The indexes should therefore be interpreted with great caution. Corollary: the costs per grp were exceptionally low.

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Feb - 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	21 vs 20
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	35,3%	34,1%	35,2%	33,7%	96
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	76,5%	74,3%	68,3%	65,1%	95
	VHS + DVD player + Blu-Ray	"	6,6%	5,6%	3,5%	3,6%	101
	Video on demand + Digital recorder	"	16,1%	19,2%	26,9%	30,6%	113
	Game console and other devices (3)	"	0,8%	1,0%	1,3%	0,8%	60
% Time shift viewing (4)	All Channels	"	20,8%	21,8%	24,1%	27,7%	115
	Main Channels (5)	"	22,2%	22,4%	24,5%	28,8%	117
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	89	88	90	
	Main channels (5) - TSV	"	49	52	50	55	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	144	134	123	106	86
	All TV channels (TSV)	"	30	30	32	33	101
	All TV channels (Live + TSV)	"	174	165	155	138	89
	Other TV Screen Usage	"	62	67	84	87	103
	Total TV Screen Usage	"	236	232	239	225	94

Warning : In March 2020 the ratings were exceptionally high (due to the first lockdown and the need for information). The indexes should therefore be interpreted with great caution.



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Mar-21

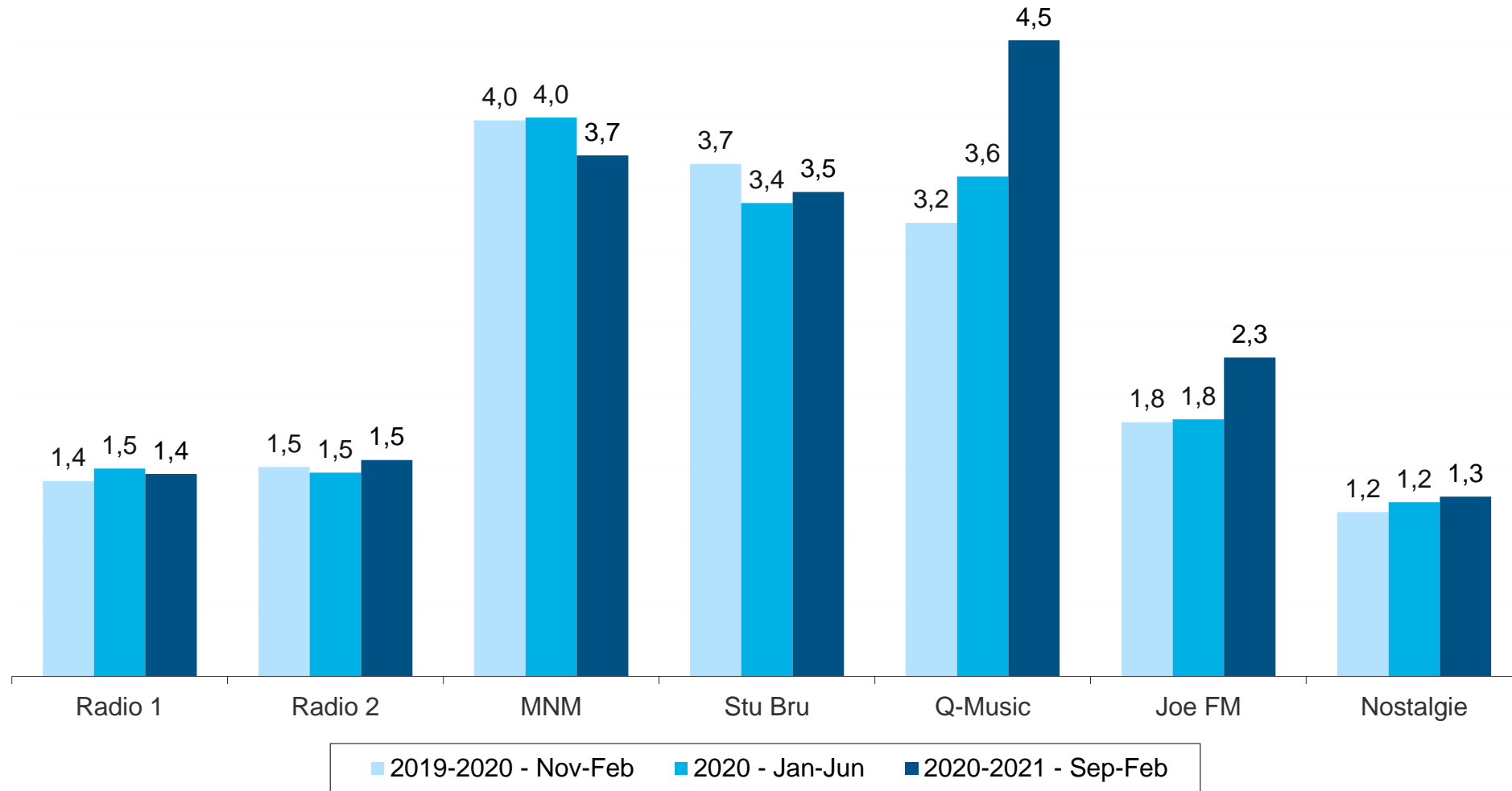
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.304.728	11	Knack/Le Vif	1.669.332
2	Nieuwsblad	2.994.936	12	La Libre.be	1.566.768
3	VRT	2.640.708	13	De Standaard	1.511.412
4	RTBF.be	2.349.396	14	De Morgen	1.499.148
5	Sudinfo	2.248.008	15	L'Avenir.net	1.433.880
6	2dehands.be/2ememain.be	1.952.160	16	Flair	1.207.920
7	DH.be	1.911.588	17	Sporza	1.185.912
8	Le Soir	1.836.996	18	Gazet van Antwerpen	1.174.068
9	RTL.be	1.783.320	19	Een	1.165.752
10	Immoweb	1.725.444	20	7sur7.be	1.164.156



Key Radio figures

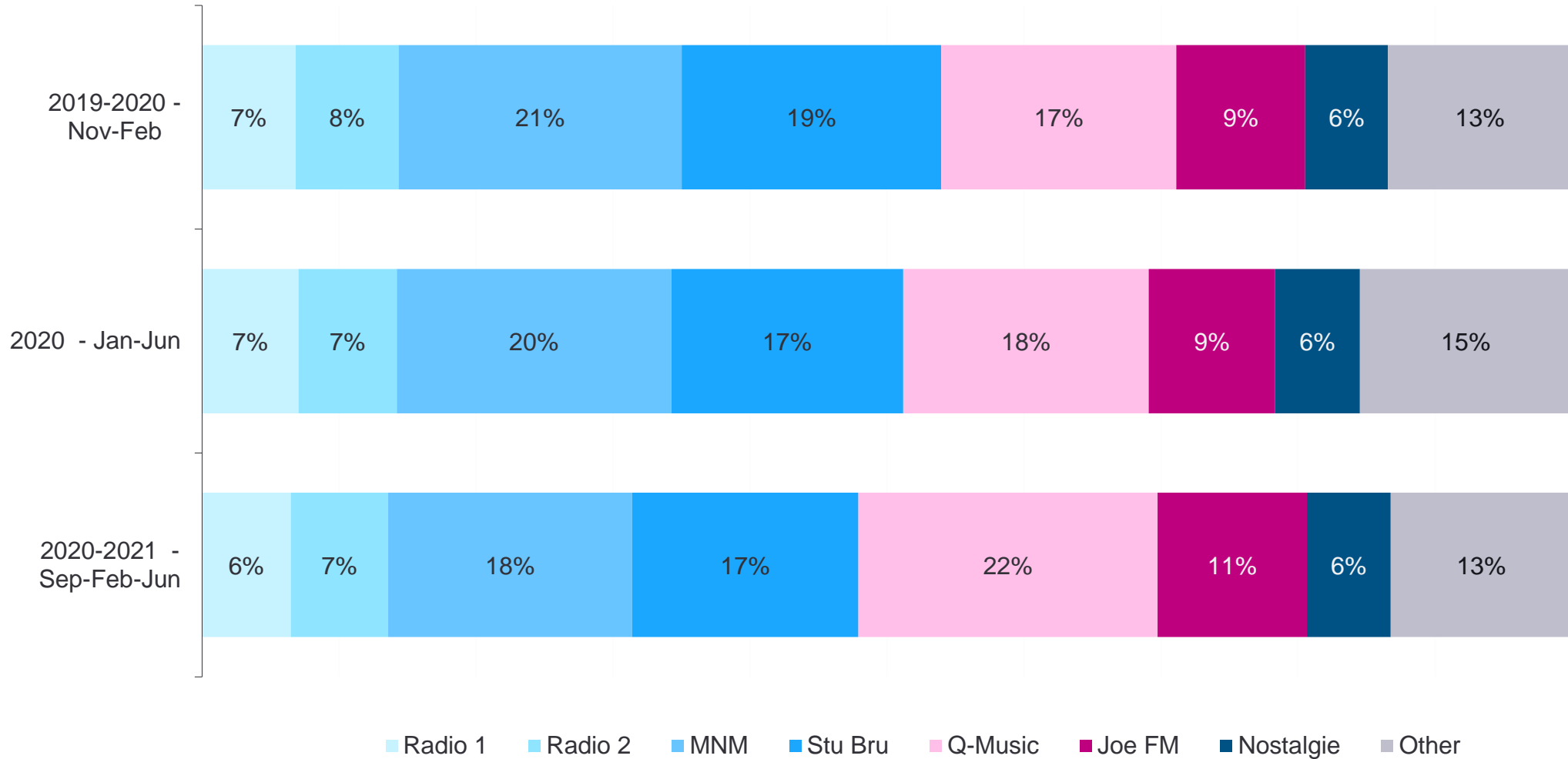
KEY RADIO FIGURES NORTH

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



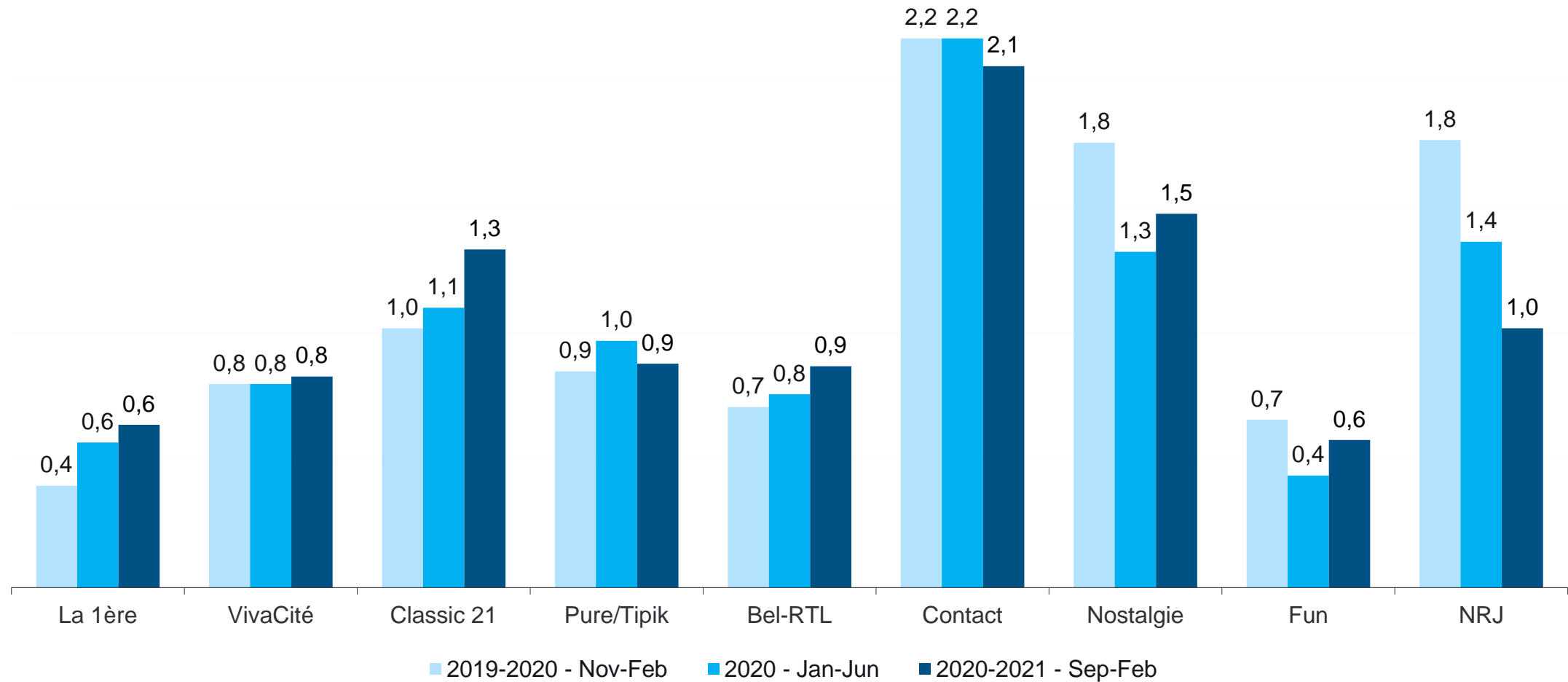
KEY RADIO FIGURES NORTH

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



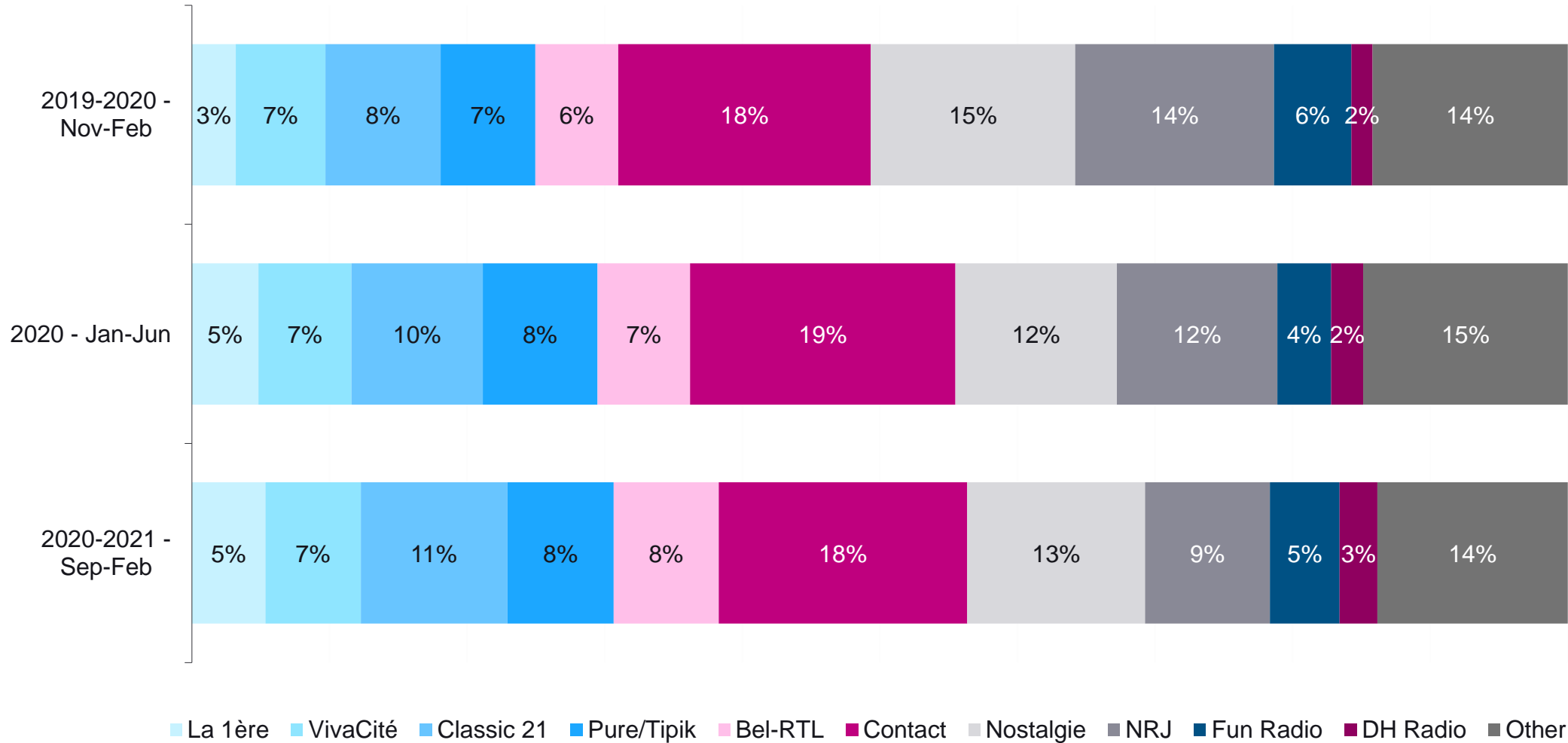
KEY RADIO FIGURES SOUTH

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 2020 (Paid + Free - digital sales included)

NORTH	Circulation	vs 2019	Digital Part	vs 2019	SOUTH	Circulation	vs 2019	Digital Part	vs 2019
Het Laatste Nieuws/De Nieuwe Gazet	230.054	↓ 95	14%	↑ 126	Le Soir	73.639	↑ 120	56%	↑ 172
Het Nieuwsblad/De Gentenaar	204.678	↓ 97	10%	↑ 116	L'Avenir	69.087	↓ 92	9%	↓ 76
De Standaard	110.868	↑ 106	36%	↑ 120	Sud Presse	69.052	↓ 94	21%	↑ 121
Het Belang van Limburg	84.900	↓ 98	12%	↑ 111	La Libre Belgique	40.956	↑ 109	39%	↑ 129
Gazet van Antwerpen	72.417	↓ 95	13%	↑ 109	La DH	31.928	↓ 91	21%	↑ 124
De Tijd	49.927	↑ 109	51%	↑ 110	L'Echo	16.917	↑ 101	53%	↑ 106
De Morgen	46.618	↓ 98	43%	↑ 109	Grenz Echo	8.449	↓ 88	12%	↑ 163
Total North	799.462	↓ 98	20%	↑ 119	Total South	310.028	→ 100	30%	↑ 138

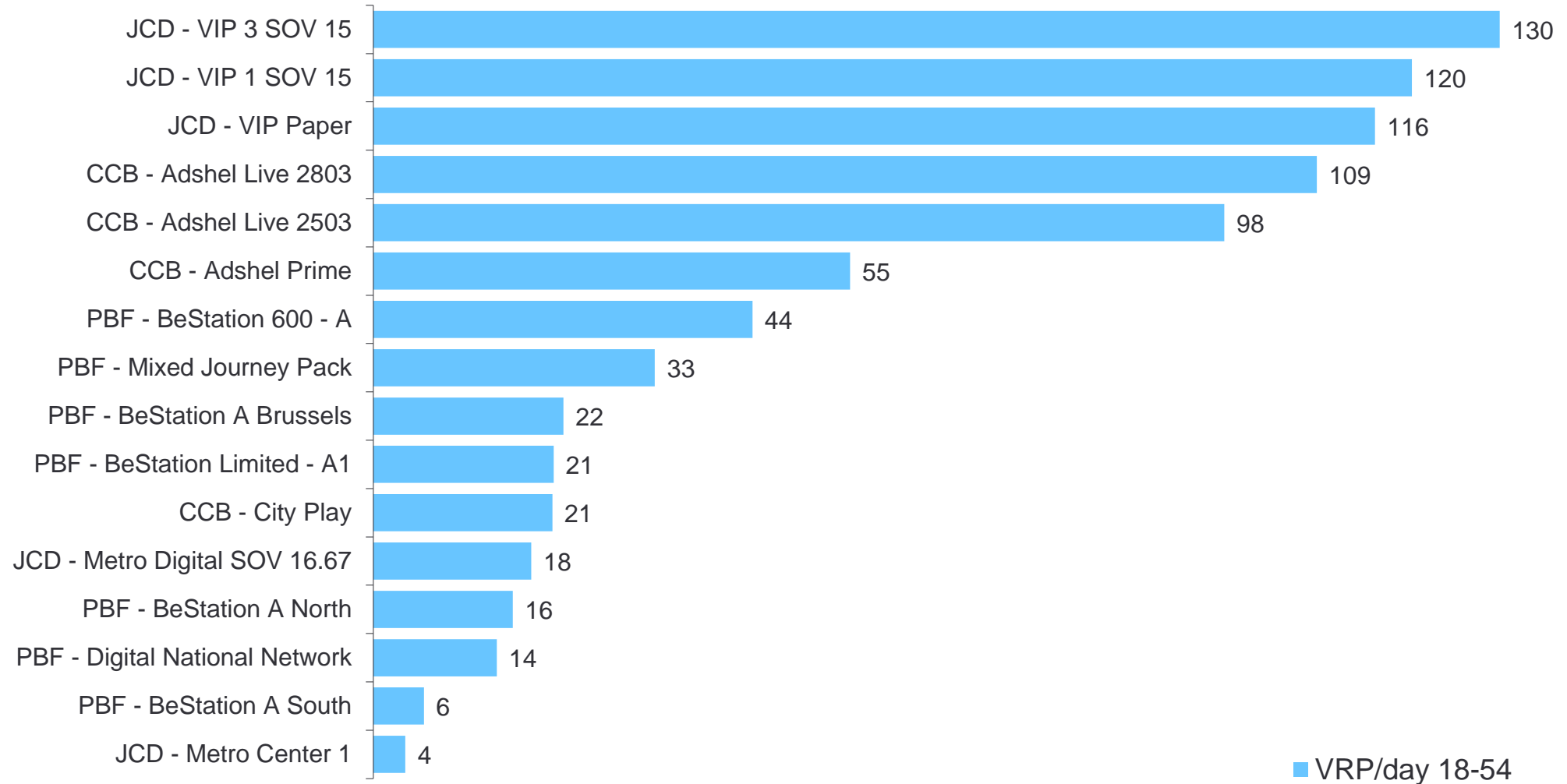
Key Print Figures - Magazines Circulation - Year 2020 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages		TOTAL	
	Circulation	vs 2019	Circulation	vs 2019	Circulation	vs 2019	Circulation	vs 2019
Television	572.494	↓ 96	345.684	↓ 93			918.178	↓ 95
Lifestyle Culture & Travel	110.940	↑ 104	68.286	↑ 102	354.928	↑ 107	534.154	↑ 105
Women	307.494	↓ 96	131.623	↓ 89			439.117	↓ 93
Business & News	103.172	↓ 98	128.560	↓ 98	43.473	↓ 85	275.205	↓ 95
Generation (Youth/Senior)			13.315	↓ 91	114.521	↓ 96	127.836	↓ 95
Build & Deco	42.917	↓ 90	21.408	↓ 80	26.452	↓ 94	90.777	↓ 89
Men	23.388	↓ 81	11.704	↓ 79	30.621	↓ 98	65.713	↓ 88
TOTAL	1.160.405	↓ 96	720.580	↓ 93	569.995	↑ 101	2.450.980	↓ 96



Out Of Home Ratings

OOH Ratings - Street furniture & Stations VRP's* per day (National) on ALL 18-54



■ VRP/day 18-54

OOH Ratings - Panoramic & Classic billboards VRP's* per day (National) on ALL 18-54

