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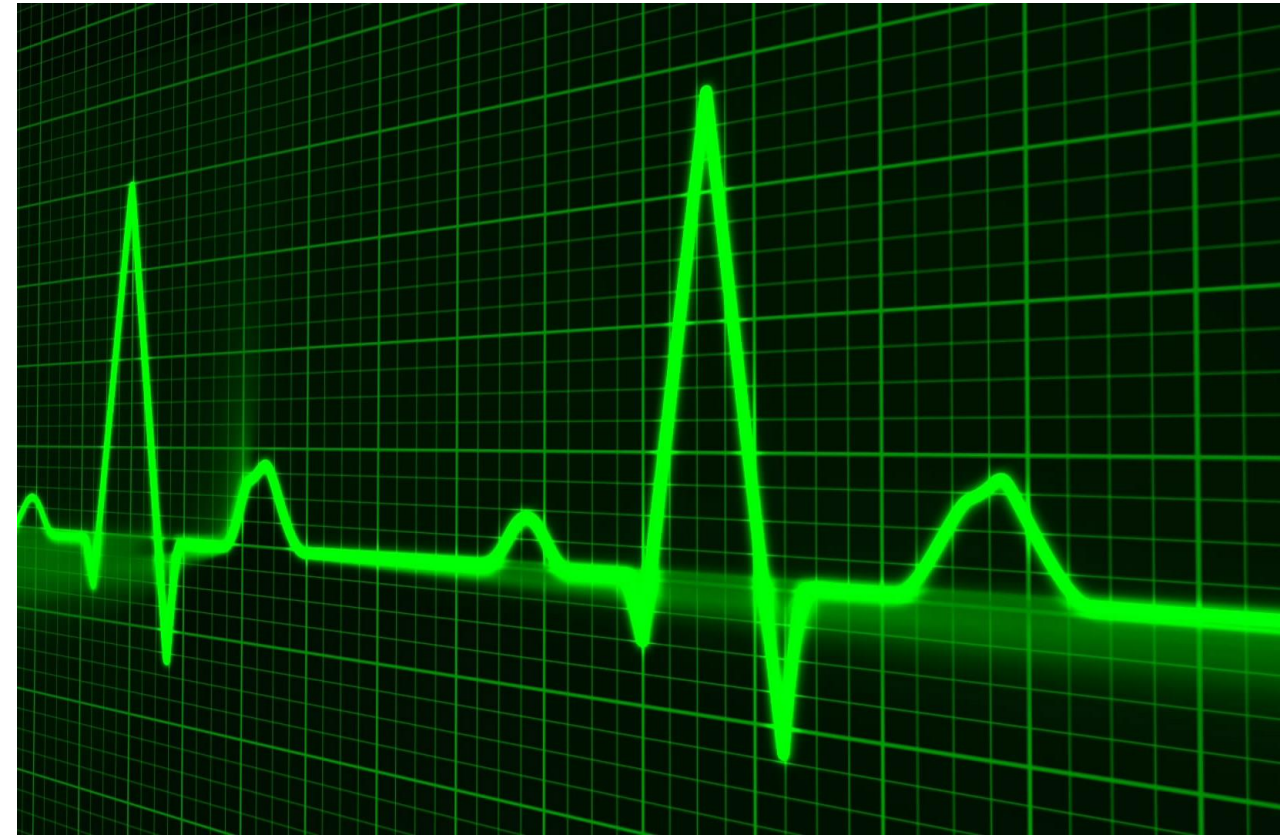
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

November 2020



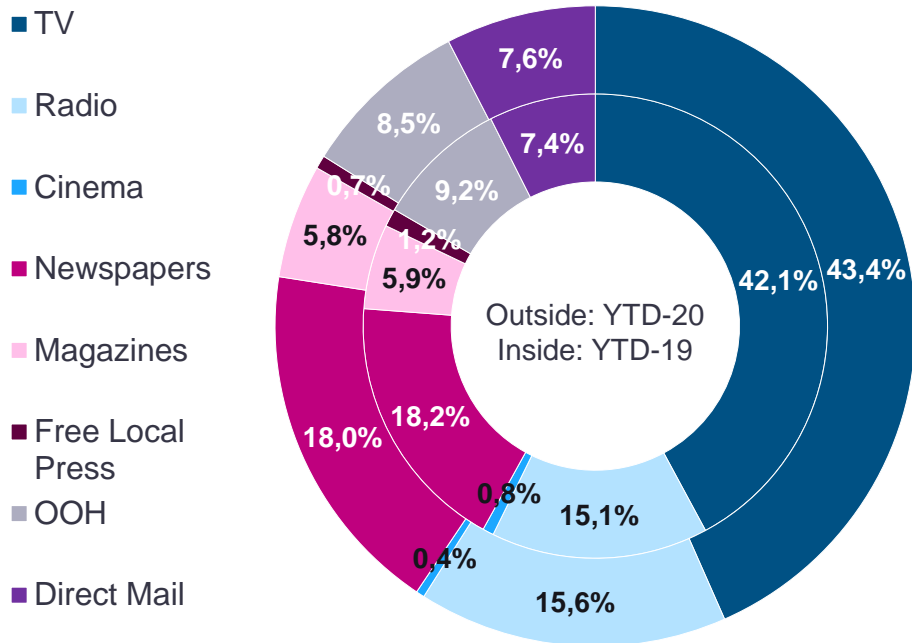
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Oct 2020

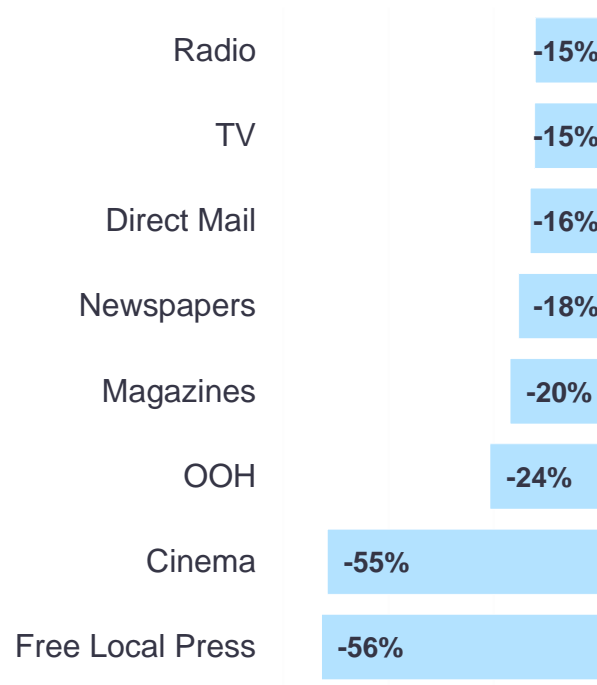
NB : No Internet figures in MDB for 2019 & 2020

Market	National	North	South
<ul style="list-style-type: none"> ▪ € Mo ▪ vs YTD-19 ▪ % Region 	2.575,8 - 17,7% 100%	1.560,3 - 18,2% 61%	1.015,5 - 16,8% 39%

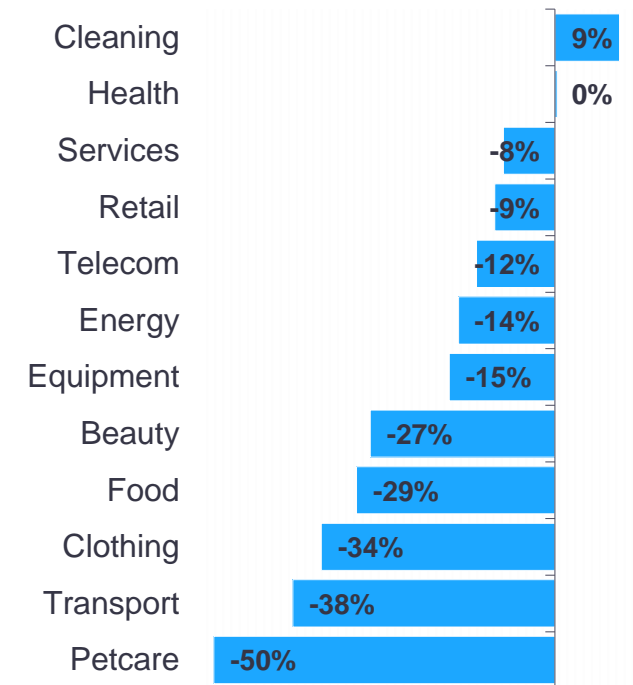
Media Mix Evol.



Media Evol. (vs YTD-19)



EcoGroups Evol. (vs YTD-19)



MDB TOP 30 ADVERTISERS - Jan-Oct 2020

NB : No Internet figures in MDB for 2019 & 2020

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
1	COLRUYT GROUP	103,5	↑ 127
2	PROCTER & GAMBLE	91,1	↔ 99
3	AHOLD DELHAIZE	53,1	↑ 130
4	RECKITT & BENCKISER	37,5	↓ 88
5	THE COCA-COLA COMPANY	36,1	↓ 55
6	UNILEVER	33,8	↓ 75
7	TELENET GROUP HOLDING	32,3	↑ 106
8	ALDI	27,7	↑ 148
9	PROXIMUS GROUP	27,6	↓ 68
10	D'IETEREN GROUP	27,2	↓ 47
11	PSA GROUPE	24,9	↓ 52
12	ORANGE	24,8	↓ 82
13	CARREFOUR GROUP	23,0	↓ 77
14	LOTERIE NATIONALE	22,8	↑ 118
15	RENAULT-NISSAN ALLIANCE	21,9	↓ 69

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
16	NETHYS	21,0	↔ 101
17	NESTLE GROUP	19,8	↑ 151
18	THE WALT DISNEY COMPANY	19,7	↓ 91
19	LIDL & CO	19,6	↑ 115
20	PEPSICO	19,6	↑ 130
21	AS WATSON	19,3	↑ 117
22	FERRERO	19,0	↓ 58
23	L'OREAL GROUP	18,8	↓ 78
24	VINTED	18,1	↓ 65
25	GROUPE 3 SUISES	17,4	↑ 105
26	BEIERSDORF	16,6	↔ 99
27	MONDELEZ INTERNATIONAL	16,2	↓ 81
28	BMW GROUP BELGIUM	15,2	↓ 88
29	HENKEL	15,2	↑ 176
30	AXA GROUP	15,1	↑ 152



Key TV figures

Key TV figures North - Nov-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Nov-20	YTD	Nov-20	YTD	Nov-20	YTD
VTM	PRP 18-54	9,0	7,2	27,2	26,1	922	868
VTM2	PRP 18-44	1,6	1,7	5,3	7,0	1.259	939
VTM3	PRP 18-54	1,3	1,2	3,8	4,2	716	644
VTM4	MEN 18-54	0,6	0,6	2,0	2,4	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	4,9	3,2	14,7	11,8	1.071	996
VIJF	PRP 18-54	1,1	1,4	3,3	5,2	997	819
ZES	PRP 18-54	0,7	0,6	2,0	2,2	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	33,1	27,6				
Total TV	PRP 18-44	29,2	24,0				
Total TV	MEN 18-54	27,1	22,8				

Key TV indexes North - Nov-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	
		Nov-20	YTD	Nov-20	YTD	Nov-20	YTD
VTM	PRP 18-54	↑ 119	↑ 114	↑ 105	↑ 109	✓ 95	✓ 98
VTM2	PRP 18-44	↓ 87	↑ 105	↓ 74	→ 100	✗ 138	✗ 113
VTM3	PRP 18-54	↓ 95	↓ 86	↓ 84	↓ 82	✓ 89	✓ 88
VTM4	MEN 18-54	↑ 104	↑ 115	↓ 92	↑ 109	Package	Package
VIER	PRP 18-54	↑ 110	↓ 96	↓ 97	↓ 92	✗ 102	✗ 103
VIJF	PRP 18-54	↓ 73	↓ 98	↓ 65	↓ 93	✗ 115	✗ 107
ZES	PRP 18-54	→ 100	↑ 105	↓ 88	→ 101	Package	Package
Total TV	PRP 18-54	↑ 113	↑ 105				
Total TV	PRP 18-44	↑ 118	↑ 105				
Total TV	MEN 18-54	↑ 112	↑ 105				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Nov - 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	28,4%	28,1%	28,0%	30,9%	110
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	85,6%	83,0%	81,4%	79,0%	97
	VHS + DVD player + Blu-Ray	"	4,0%	3,5%	2,4%	2,3%	96
	Video on demand + Digital recorder	"	9,2%	11,9%	14,5%	17,3%	119
	Game console and other devices (3)	"	1,3%	1,6%	1,7%	1,4%	81
% Time shift viewing (4)	All Channels	"	23,8%	25,9%	29,2%	32,5%	111
	Main Channels (5)	"	26,7%	30,3%	33,3%	36,5%	110
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	87	86	85	84	
	Main channels (5) - TSV	"	31	33	34	36	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	107	102	96	98	103
	All TV channels (TSV)	"	29	30	32	37	117
	All TV channels (Live + TSV)	"	136	132	127	136	106
	Other TV Screen Usage	"	31	36	38	47	126
	Total TV Screen Usage	"	166	167	165	183	111

Key TV figures South - Nov-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Nov-20	YTD	Nov-20	YTD	Nov-20	YTD
RTL-TVI	PRP 18-54	8,4	7,0	28,9	27,1	1.007	758
Club-RTL	MEN 18-54	1,2	1,0	5,3	5,3	1.219	1.102
Plug-RTL	ALL 15-34	0,7	0,6	4,1	4,4	993	696
TF1	PRP 18-54	4,1	3,3	14,0	13,0	678	573
La Une	PRP 18-54	4,2	3,9	14,6	15,3	822	668
Tipik	PRP 18-54	1,4	1,4	4,8	5,3	901	646
AB3	PRP 18-44	1,5	1,5	6,7	7,2	787	693
TTV	PRP 18-54	28,9	25,6				
TTV	PRP 18-44	23,0	21,3				
TTV	ALL 15-34	16,1	14,3				
TTV	MEN 18-54	22,0	18,9				

Key TV indexes South - Nov-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	
		Nov-20	YTD	Nov-20	YTD	Nov-20	YTD
RTL-TV1	PRP 18-54	↑ 123	↑ 106	↑ 118	↑ 107	✗ 109	✓ 96
Club-RTL	MEN 18-54	↓ 91	↓ 76	↓ 84	↓ 78	✗ 122	✗ 133
Plug-RTL	ALL 15-34	↑ 125	↑ 113	↑ 123	↑ 114	✗ 120	✓ 94
TF1	PRP 18-54	↑ 117	↑ 113	↑ 112	↑ 113	✓ 87	✓ 87
La Une	PRP 18-54	↓ 97	↑ 107	↓ 93	↑ 107	✗ 105	✓ 100
Tipik	PRP 18-54	↓ 87	↘ 99	↓ 83	→ 100	✗ 119	✗ 102
AB3	PRP 18-44	↓ 67	↓ 68	↓ 67	↓ 69	✗ 102	✗ 106
TTV	PRP 18-54	↑ 105	→ 100				
TTV	PRP 18-44	↘ 99	↘ 99				
TTV	ALL 15-34	↘ 101	↓ 98				
TTV	MEN 18-54	↑ 109	↓ 97				

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Nov - 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	32,5%	31,3%	31,0%	33,4%	108
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	78,1%	75,1%	71,6%	67,2%	94
	VHS + DVD player + Blu-Ray	"	7,0%	6,3%	4,8%	4,1%	85
	Video on demand + Digital recorder	"	14,2%	17,8%	22,3%	27,6%	124
	Game console and other devices (3)	"	0,8%	0,8%	1,3%	1,2%	87
% Time shift viewing (4)	All Channels	"	18,7%	20,3%	21,9%	24,2%	110
	Main Channels (5)	"	20,3%	20,7%	22,5%	24,5%	109
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	84	86	88	
	Main channels (5) - TSV	"	52	50	50	51	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	138	126	121	117	96
	All TV channels (TSV)	"	27	26	28	30	110
	All TV channels (Live + TSV)	"	165	152	148	147	99
	Other TV Screen Usage	"	54	59	68	85	126
	Total TV Screen Usage	"	220	212	216	232	107



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Nov-20

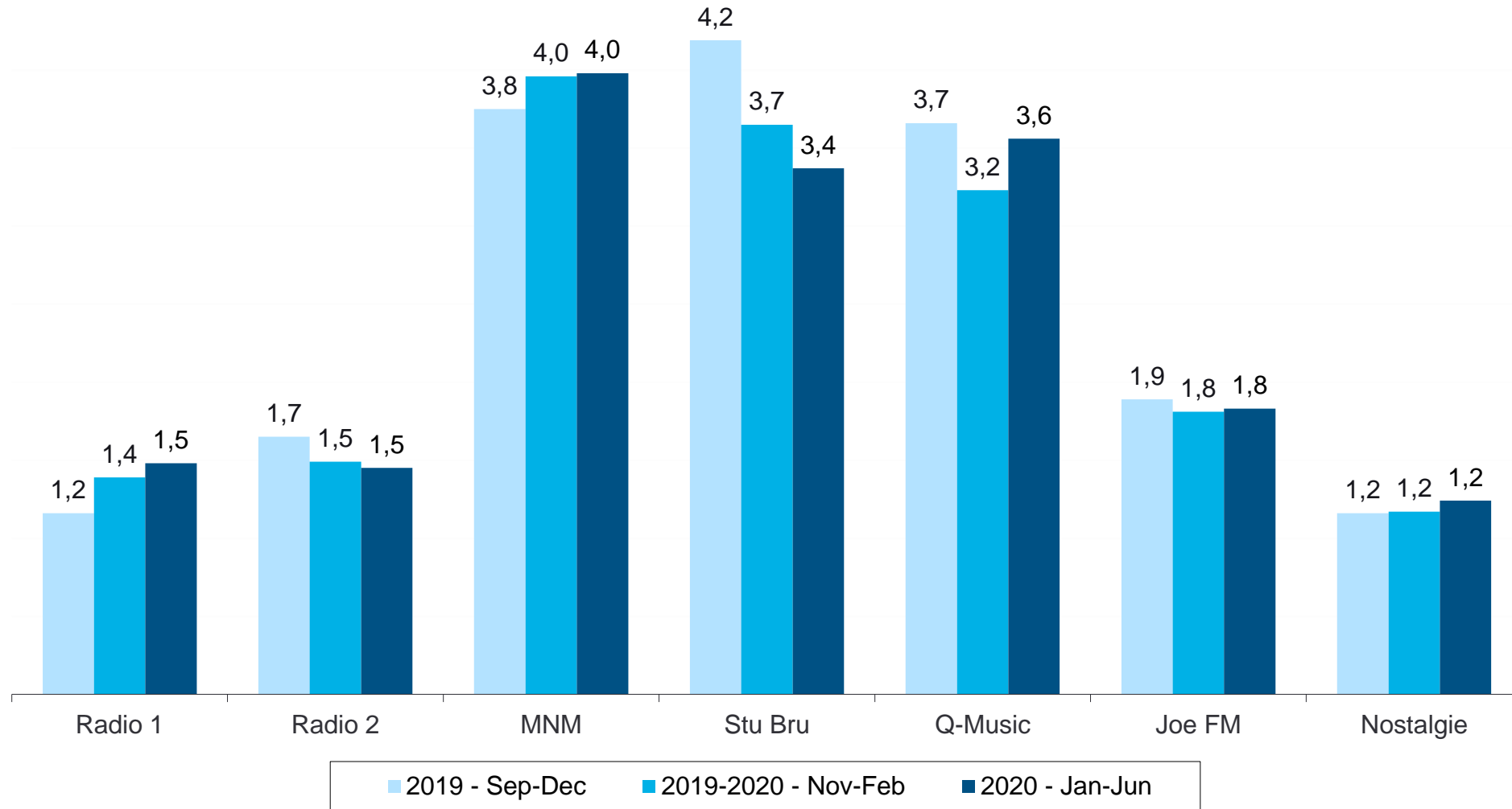
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.363.276	11	De Standaard	1.596.756
2	Nieuwsblad	2.978.220	12	De Morgen	1.520.316
3	VRT	2.705.640	13	Immoweb	1.497.552
4	Sudinfo	2.391.312	14	L'Avenir.net	1.451.772
5	RTBF.be	2.382.660	15	La Libre.be	1.420.356
6	RTL.be	2.115.204	16	Flair	1.383.816
7	2dehands.be/2ememain.be	2.044.140	17	Een	1.299.984
8	DH.be	2.033.388	18	Metrotime	1.212.456
9	Knack/Le Vif	1.888.824	19	7sur7.be	1.183.812
10	Le Soir	1.820.952	20	Gazet van Antwerpen	1.170.456



Key Radio figures

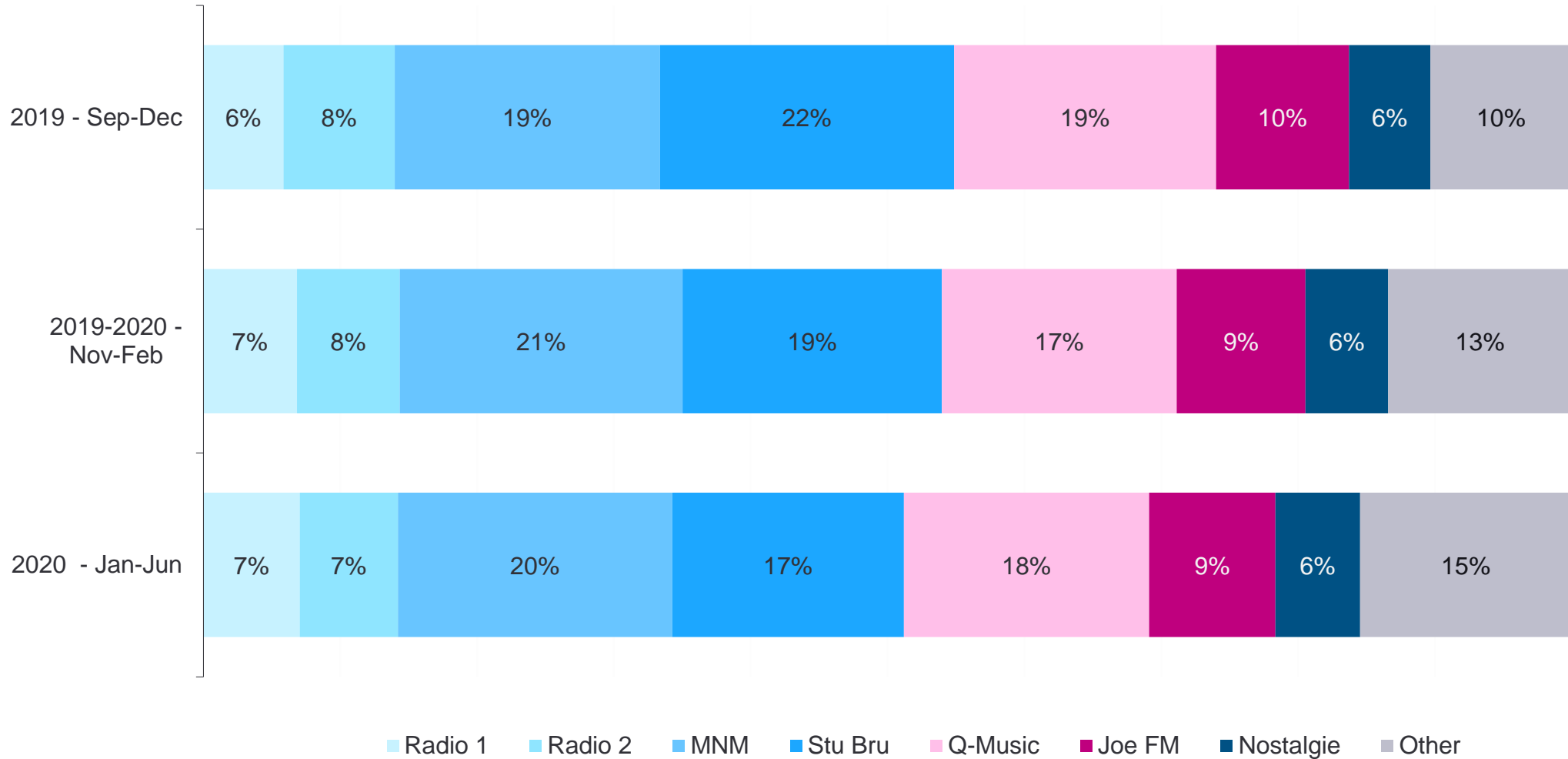
KEY RADIO FIGURES NORTH

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



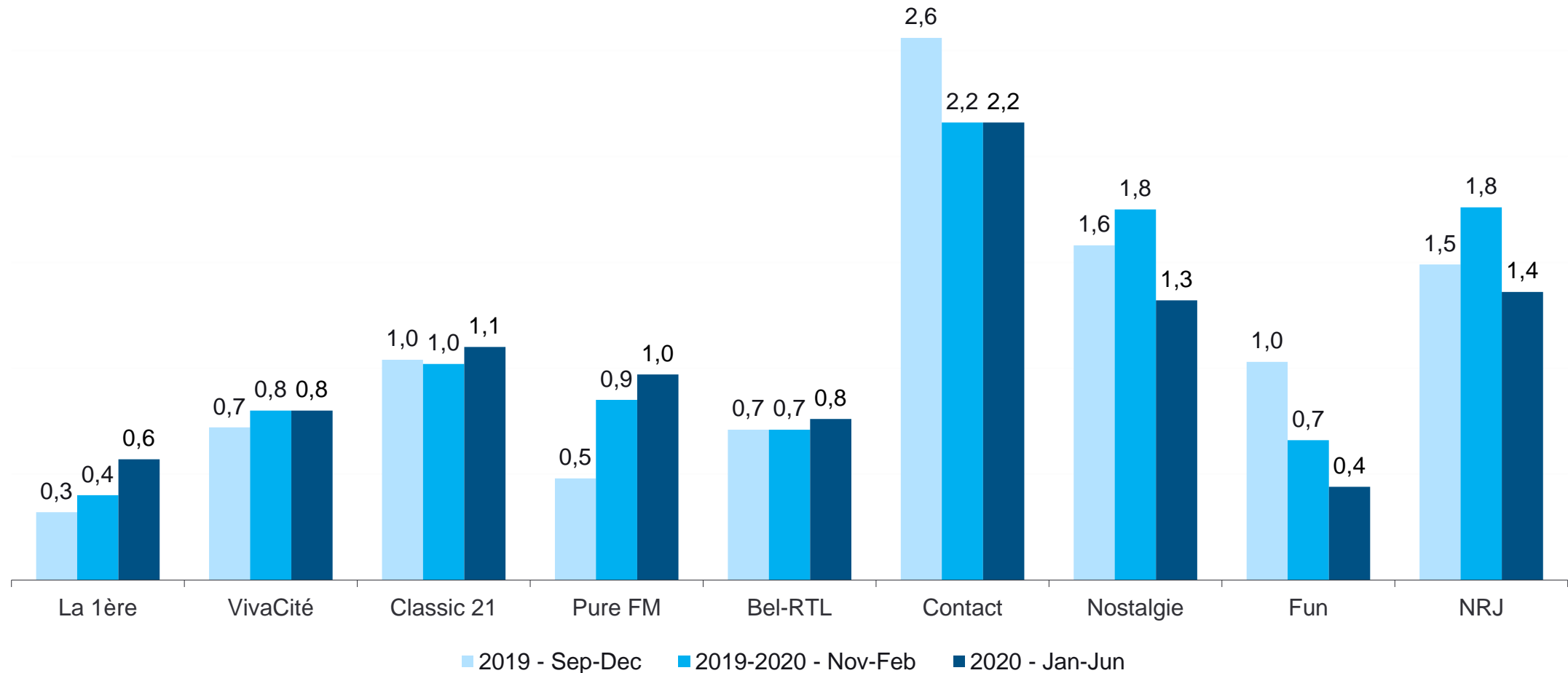
KEY RADIO FIGURES NORTH

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



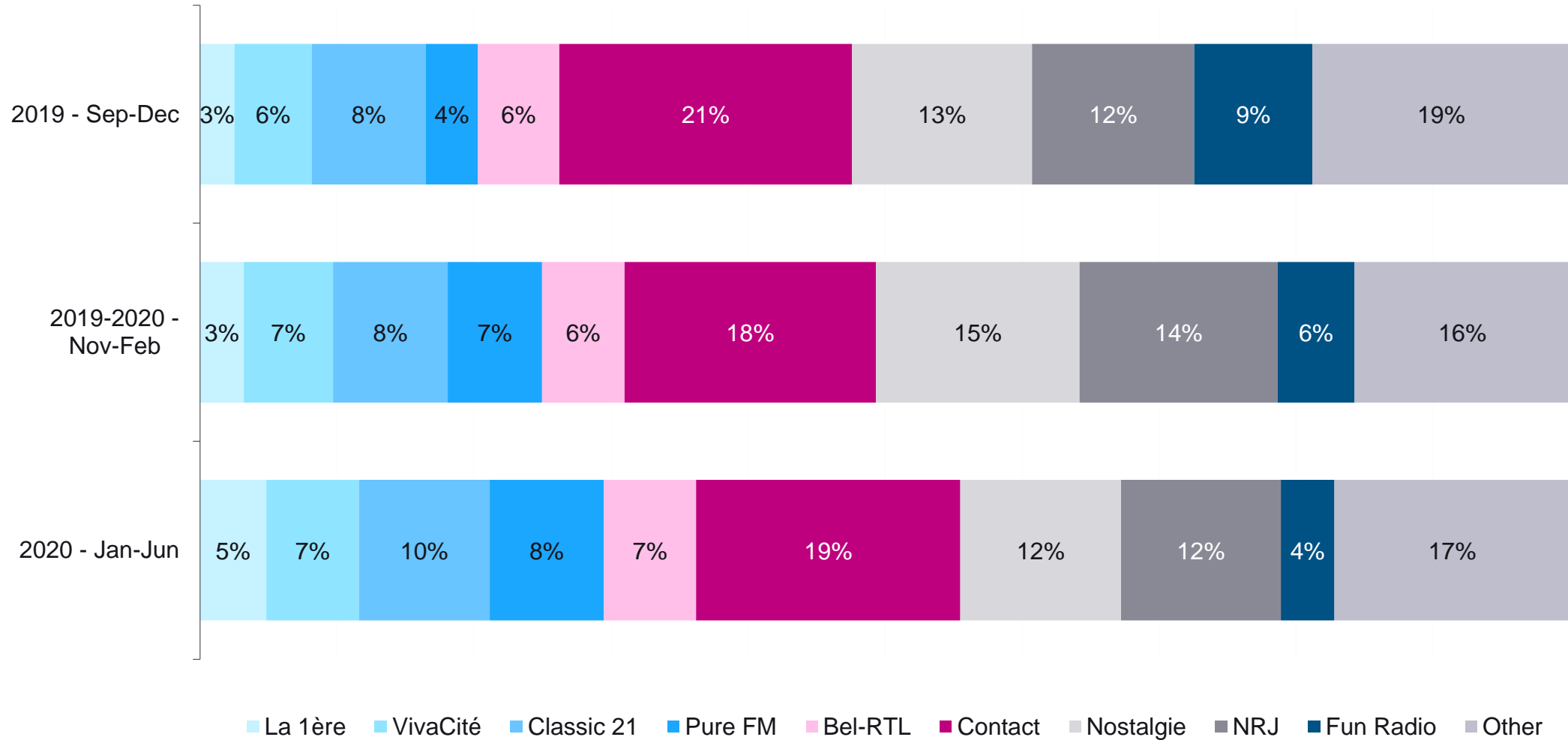
KEY RADIO FIGURES SOUTH

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	242.109	↓ 94	11%	↑ 129
Het Nieuwsblad	211.209	↓ 96	8%	↑ 119
De Standaard	104.352	→ 100	30%	↑ 118
Het Belang van Limburg	86.450	↓ 97	11%	↑ 132
Gazet van Antwerpen	76.500	↓ 94	12%	↑ 134
De Morgen	47.507	↓ 92	40%	↑ 110
De Tijd	45.877	↑ 104	46%	↑ 107
Total North	814.004	↓ 96	17%	↑ 120

SOUTH	Circulation	vs 2018	Digital Part	vs 2018
L'Avenir	75.284	↓ 97	12%	↑ 112
Sud Presse	73.253	→ 100	17%	↑ 173
Le Soir	61.353	↑ 107	32%	↑ 174
La Libre Belgique	37.563	↑ 106	30%	↑ 133
La DH	34.992	↓ 95	17%	↑ 129
L'Echo	16.684	↑ 102	50%	↑ 108
Grenz Echo	9.575	↓ 97	8%	↑ 124
Total South	308.704	→ 100	22%	↑ 142

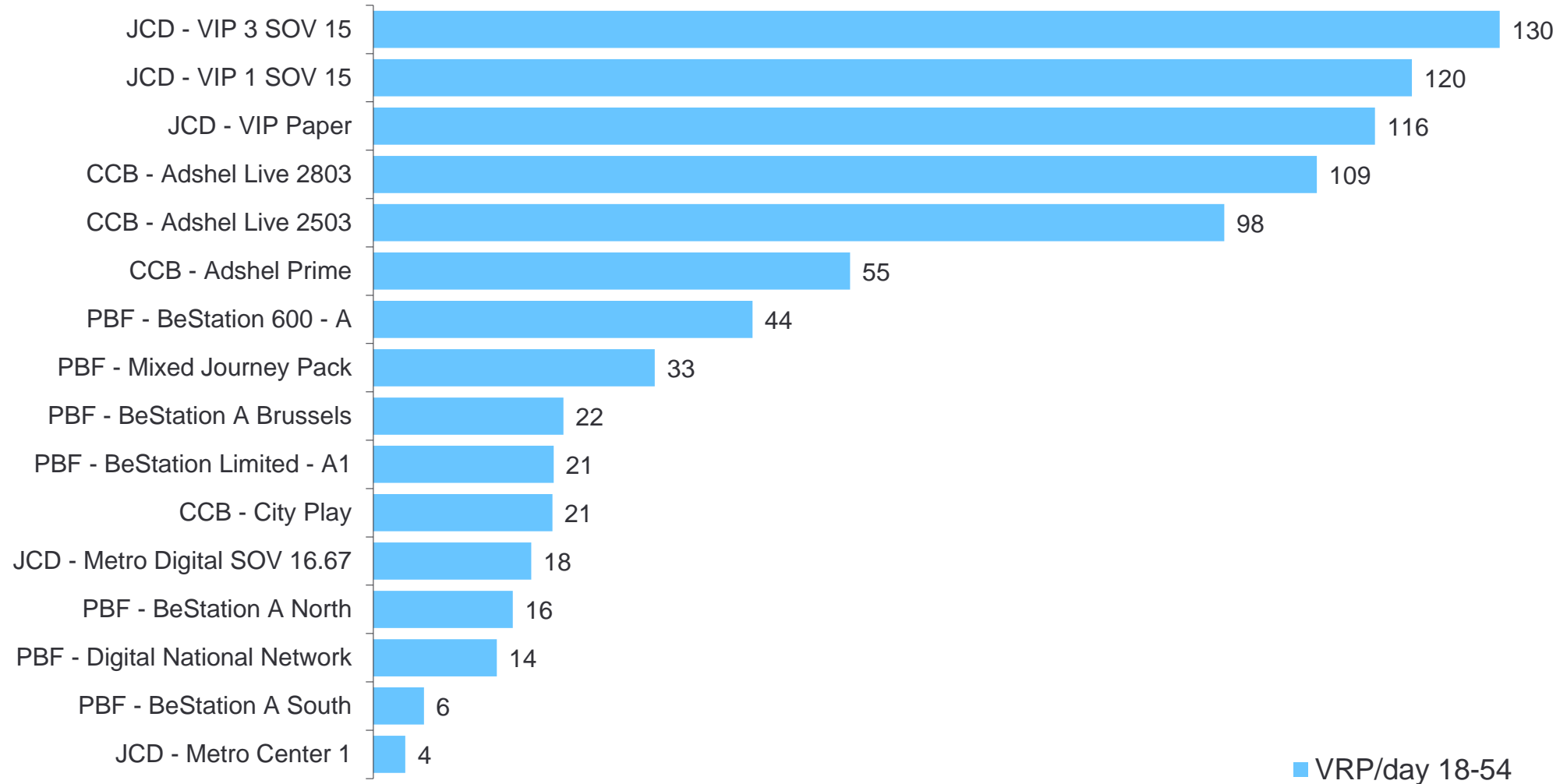
Key Print Figures - Magazines Circulation - Year 2019 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages		TOTAL	
	Circulation	vs 2018	Circulation	vs 2018	Circulation	vs 2018	Circulation	vs 2018
Television	596.815	↓ 95	372.411	↓ 93			969.226	↓ 94
Women	334.431	↓ 96	152.069	↓ 90			486.500	↓ 94
Business & News	105.604	↑ 103	131.699	↓ 97	51.359	↓ 88	288.662	↓ 97
Generation (Youth/Senior)			14.572	↓ 93	119.560	↓ 98	134.132	↓ 97
Build & Deco	47.684	↓ 95	26.668	↓ 99	28.186	↓ 74	102.538	↓ 89
Men	28.770	↓ 87	14.844	↓ 91	31.110	↓ 71	74.724	↓ 80
TOTAL	1.113.304	↓ 96	712.263	↓ 93	230.215	↓ 88	2.055.782	↓ 94



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

