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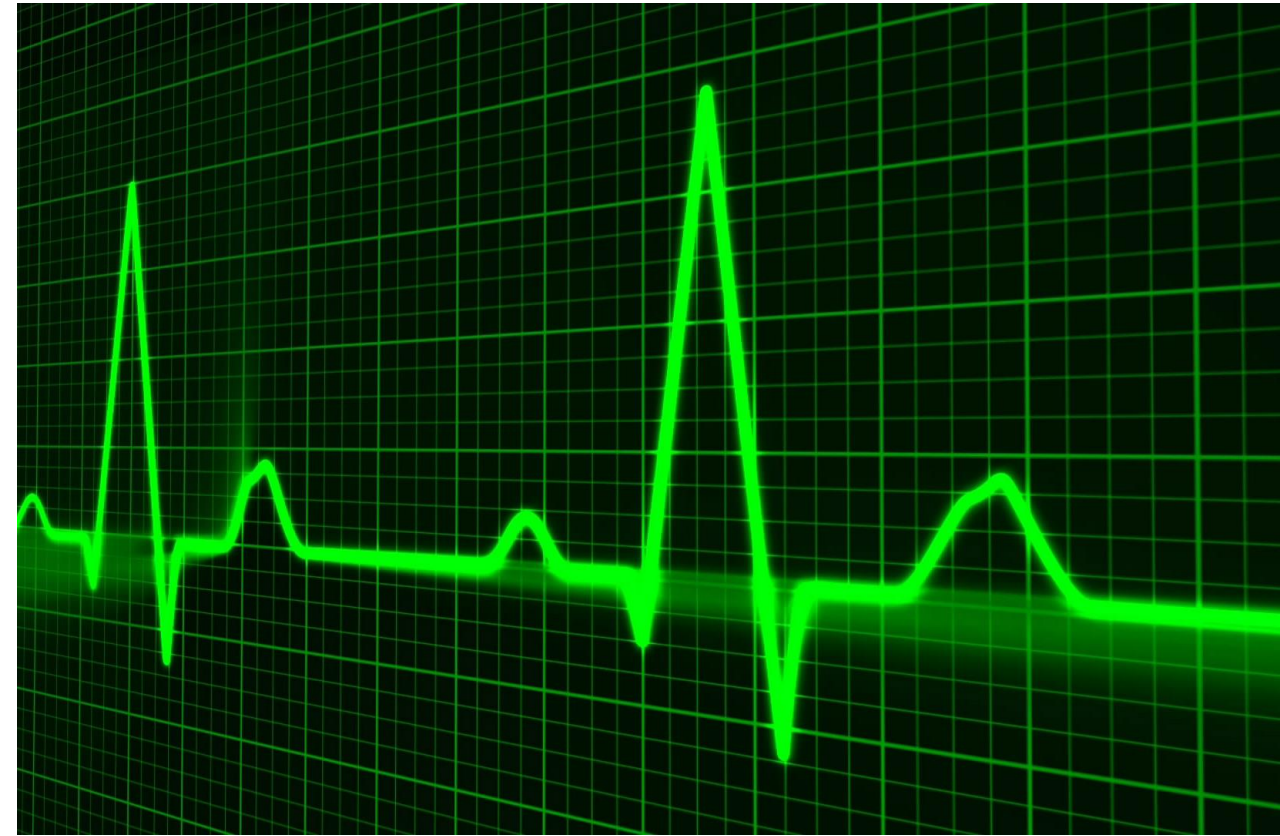
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

August 2021



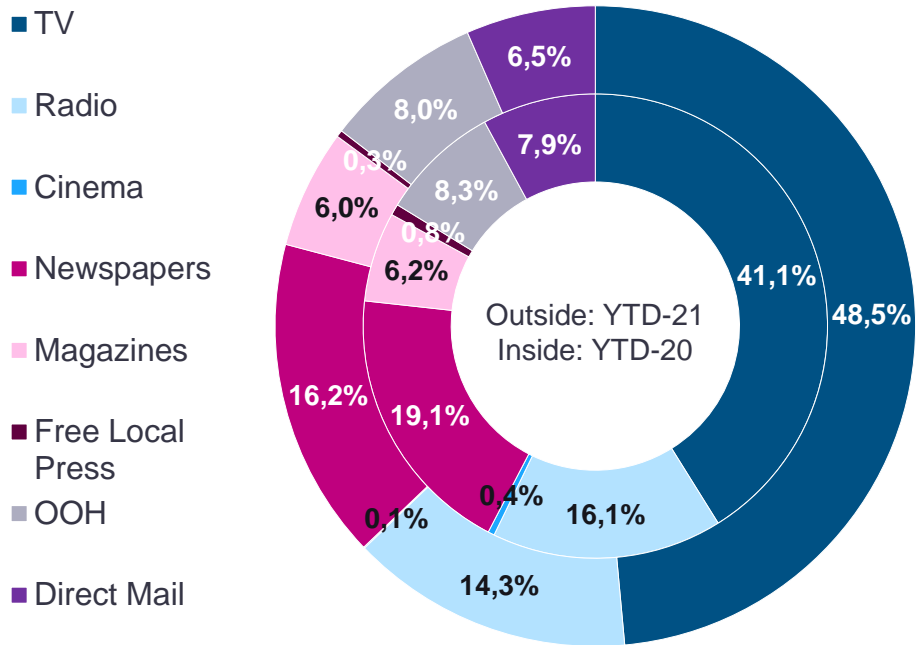
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Jul 2021

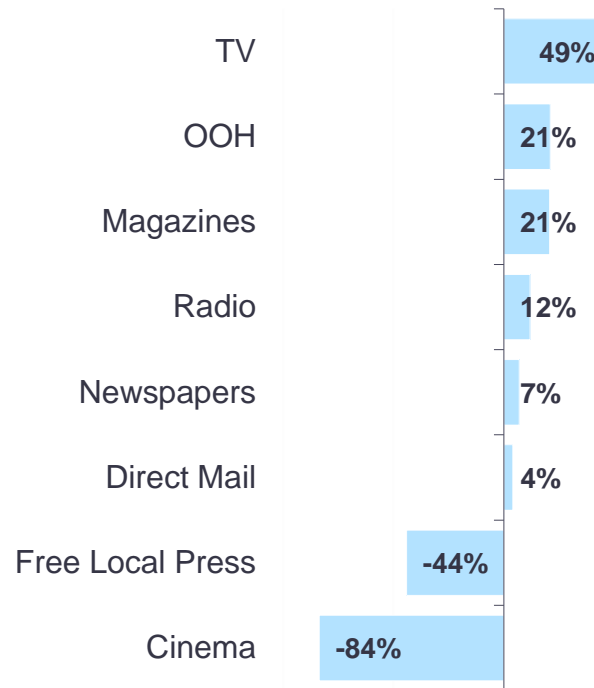
NB : No Internet figures in MDB for 2020 & 2021

Market	National	North	South
<ul style="list-style-type: none"> ■ € Mo ■ vs YTD-20 ■ % Region 	2.017,2 + 25,9% 100%	1.234,6 + 26,2% 61%	782,6 + 25,5% 39%

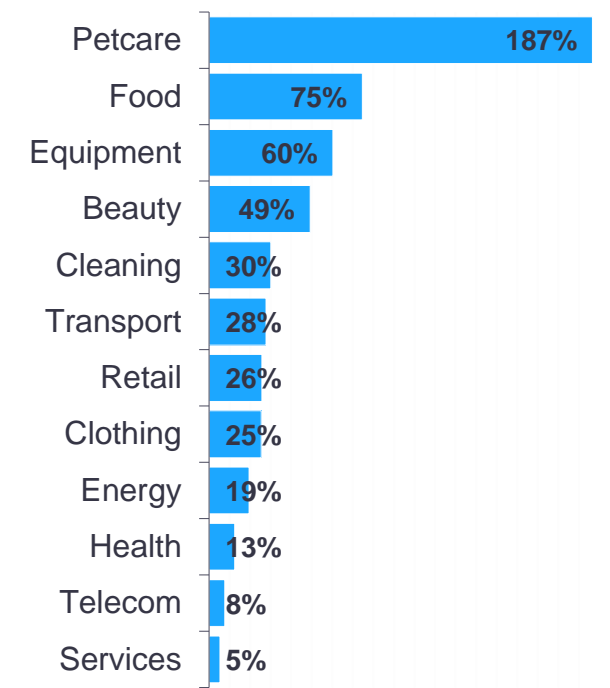
Media Mix Evol.



Media Evol. (vs YTD-20)



EcoGroups Evol. (vs YTD-20)



MDB TOP 30 ADVERTISERS - Jan-Jul 2021

NB : No Internet figures in MDB for 2020 & 2021

Rank	ADV.GROUP	Gross Inv.	vs 2020
1	PROCTER & GAMBLE BENELUX	80,4	↑ 147
2	COLRUYT GROUP	79,6	↑ 120
3	AHOLD DELHAIZE	43,5	↑ 147
4	THE COCA-COLA COMPANY	41,3	↑ 304
5	D'IETEREN GROUP	36,5	↑ 170
6	UNILEVER	32,1	↑ 170
7	RECKITT & BENCKISER	25,2	↑ 118
8	TELENET GROUP HOLDING	24,0	↑ 127
9	L'OREAL GROUP	19,2	↑ 196
10	NESTLE GROUP	18,5	↑ 152
11	PROXIMUS GROUP	18,5	↑ 107
12	RENAULT-NISSAN ALLIANCE	17,6	↑ 115
13	LOTERIE NATIONALE	17,4	↑ 125
14	PSA GROUPE	17,1	↓ 92
15	ORANGE	17,1	↑ 107

Rank	ADV.GROUP	Gross Inv.	vs 2020
16	AS WATSON	16,7	↑ 143
17	NETHYS	15,3	↑ 123
18	CARREFOUR GROUP	15,0	↑ 110
19	BMW GROUP BELGIUM	14,9	↑ 137
20	LIDL & CO	14,8	↑ 136
21	FERRERO	14,5	↑ 175
22	VINTED	13,9	↑ 123
23	ALDI	13,7	↓ 81
24	MONDELEZ INTERNATIONAL	13,3	↑ 167
25	BEIERSDORF	12,6	↑ 121
26	HENKEL	12,4	↑ 125
27	COOLBLUE	12,4	↑ 245
28	GROUPE 3 SUISES	11,9	↑ 105
29	HELLOFRESH	11,7	↑ 181
30	PEPSICO	11,3	↑ 102



Key TV figures

Key TV figures North - Aug-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Aug-21	YTD-21	Aug-21	YTD-21	Aug-21	YTD-21
VTM	PRP 18-54	4,2	5,7	23,0	24,1	22,8	229,0
VTM2	PRP 18-54	1,0	1,4	5,7	5,8	6,0	56,5
VTM3	PRP 18-54	0,7	0,9	4,1	3,7	3,8	36,9
VTM4	MEN 18-54	0,5	0,5	3,4	2,7	2,4	22,6
Play4	PRP 18-54	1,4	2,6	7,9	11,1	8,9	107,2
Play5	PRP 18-54	0,9	1,0	4,9	4,3	3,2	42,7
Play6	PRP 18-54	0,5	0,6	2,7	2,4	2,5	23,9
Total TV	PRP 18-54	18,1	23,7				
Total TV	MEN 18-54	15,1	19,6				

Key TV indexes North - Aug-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>Gross Invest. (€ Mo)</u> vs P-1 Total Day	
		Aug-21	YTD-21	Aug-21	YTD-21	Aug-21	YTD-21
VTM	PRP 18-54	↓ 78	↓ 85	↓ 95	↓ 96	↑ 113	↑ 130
VTM2	PRP 18-54	↓ 74	↓ 82	↓ 90	↓ 92	↑ 119	↑ 151
VTM3	PRP 18-54	↓ 72	↓ 71	↓ 87	↓ 81	↑ 156	↑ 164
VTM4	MEN 18-54	↓ 91	↓ 96	↑ 113	↑ 108	↑ 240	↑ 187
Play4	PRP 18-54	↓ 56	↓ 89	↓ 68	↔ 101	↑ 119	↑ 134
Play5	PRP 18-54	↓ 88	↓ 68	↑ 107	↓ 76	↓ 95	↑ 117
Play6	PRP 18-54	↓ 77	↓ 92	↓ 93	↑ 104	↑ 145	↑ 159
Total TV	PRP 18-54	↓ 82	↓ 89				
Total TV	MEN 18-54	↓ 80	↓ 89				

Warning : In March and April 2020 TV ratings were exceptionally high (due to the first lockdown and the need for information), and in June 2021, the UEFA Euro was broadcasted on VRT channels. The YTD indexes should therefore be interpreted with caution.

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Aug - Targetgroup: ALL 18-54

Source: CIM TV - Live +7 including guests

Variable	Channel	Daypart	YTD-18	YTD-19	YTD-20	YTD-21	21 vs 20
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	27,5%	27,2%	30,0%	28,5%	95
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	83,0%	81,1%	78,9%	72,8%	92
	VHS + DVD player + Blu-Ray	"	3,6%	2,6%	2,5%	1,7%	67
	Video on demand + Digital recorder	"	11,9%	14,7%	17,2%	24,2%	140
	Game console and other devices (3)	"	1,6%	1,7%	1,4%	1,1%	79
% Time shift viewing (4)	All Channels	"	24,6%	28,8%	32,1%	32,6%	102
	Main Channels (5)	"	29,2%	32,6%	35,6%	37,5%	105
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	86	85	86	80	
	Main channels (5) - TSV	"	35	34	37	35	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	102	94	97	82	85
	All TV channels (TSV)	"	28	31	36	33	91
	All TV channels (Live + TSV)	"	131	125	133	115	86
	Other TV Screen Usage	"	35	37	47	54	116
	Total TV Screen Usage	"	166	162	180	169	94

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

Key TV figures South - Aug-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Aug-21	YTD-21	Aug-21	YTD-21	Aug-21	YTD-21
RTL-TV1	PRP 18-54	4,3	5,5	24,3	24,7	16,3	157,6
Club-RTL	MEN 18-54	0,9	1,0	6,4	5,6	2,5	23,1
Plug-RTL	ALL 15-34	0,3	0,5	3,7	4,3	1,4	13,1
TF1	PRP 18-54	2,2	2,7	12,6	12,1	4,5	36,0
La Une	PRP 18-54	2,6	3,9	14,7	17,4	5,1	65,4
Tipik	PRP 18-54	1,2	1,6	6,5	7,3	1,4	24,3
AB3	PRP 18-44	1,1	1,2	8,0	6,8	1,4	15,8
TTV	PRP 18-54	17,8	22,1				
TTV	PRP 18-44	14,3	18,1				
TTV	ALL 15-34	9,4	11,9				
TTV	MEN 18-54	13,8	17,2				

Key TV indexes South - Aug-21

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	
		Aug-21	YTD-21	Aug-21	YTD-21	Aug-21	YTD-21
RTL-TV1	PRP 18-54	↓ 90	↓ 80	↔ 101	↓ 92	↓ 93	↑ 132
Club-RTL	MEN 18-54	↓ 82	↓ 95	↓ 92	↑ 103	↓ 97	↑ 112
Plug-RTL	ALL 15-34	↓ 65	↓ 81	↓ 77	↓ 98	↑ 120	↑ 155
TF1	PRP 18-54	↓ 91	↓ 82	↑ 103	↓ 94	↑ 143	↑ 196
La Une	PRP 18-54	↓ 89	↔ 99	↔ 101	↑ 114	↑ 106	↑ 144
Tipik	PRP 18-54	↓ 98	↑ 117	↑ 110	↑ 135	↑ 104	↑ 177
AB3	PRP 18-44	↑ 105	↓ 77	↑ 116	↓ 92	↑ 109	↓ 90
TTV	PRP 18-54	↓ 89	↓ 87				
TTV	PRP 18-44	↓ 90	↓ 84				
TTV	ALL 15-34	↓ 86	↓ 82				
TTV	MEN 18-54	↓ 90	↓ 92				

Warning : In March and April 2020 TV ratings were exceptionally high (due to the first lockdown and the need for information), and in June 2021, the UEFA Euro was broadcasted on RTBF channels. The YTD indexes should therefore be interpreted with caution.

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Aug - Targetgroup: ALL 18-54

Source: CIM TV - Live +7 including guests

Variable	Channel	Daypart	YTD-18	YTD-19	YTD-20	YTD-21	21 vs 20
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	31,1%	30,5%	33,2%	30,7%	92
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	75,3%	72,8%	67,0%	63,9%	95
	VHS + DVD player + Blu-Ray	"	6,7%	4,9%	4,0%	2,7%	69
	Video on demand + Digital recorder	"	17,3%	21,1%	27,7%	32,7%	118
	Game console and other devices (3)	"	0,8%	1,2%	1,3%	0,6%	50
% Time shift viewing (4)	All Channels	"	20,0%	21,3%	23,9%	26,4%	110
	Main Channels (5)	"	20,5%	21,7%	24,5%	27,0%	110
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	83	87	88	86	
	Main channels (5) - TSV	"	52	51	50	56	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	127	122	117	99	84
	All TV channels (TSV)	"	25	27	30	28	96
	All TV channels (Live + TSV)	"	152	149	147	127	87
	Other TV Screen Usage	"	59	64	85	83	98
	Total TV Screen Usage	"	211	214	232	210	91

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



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Aug-21

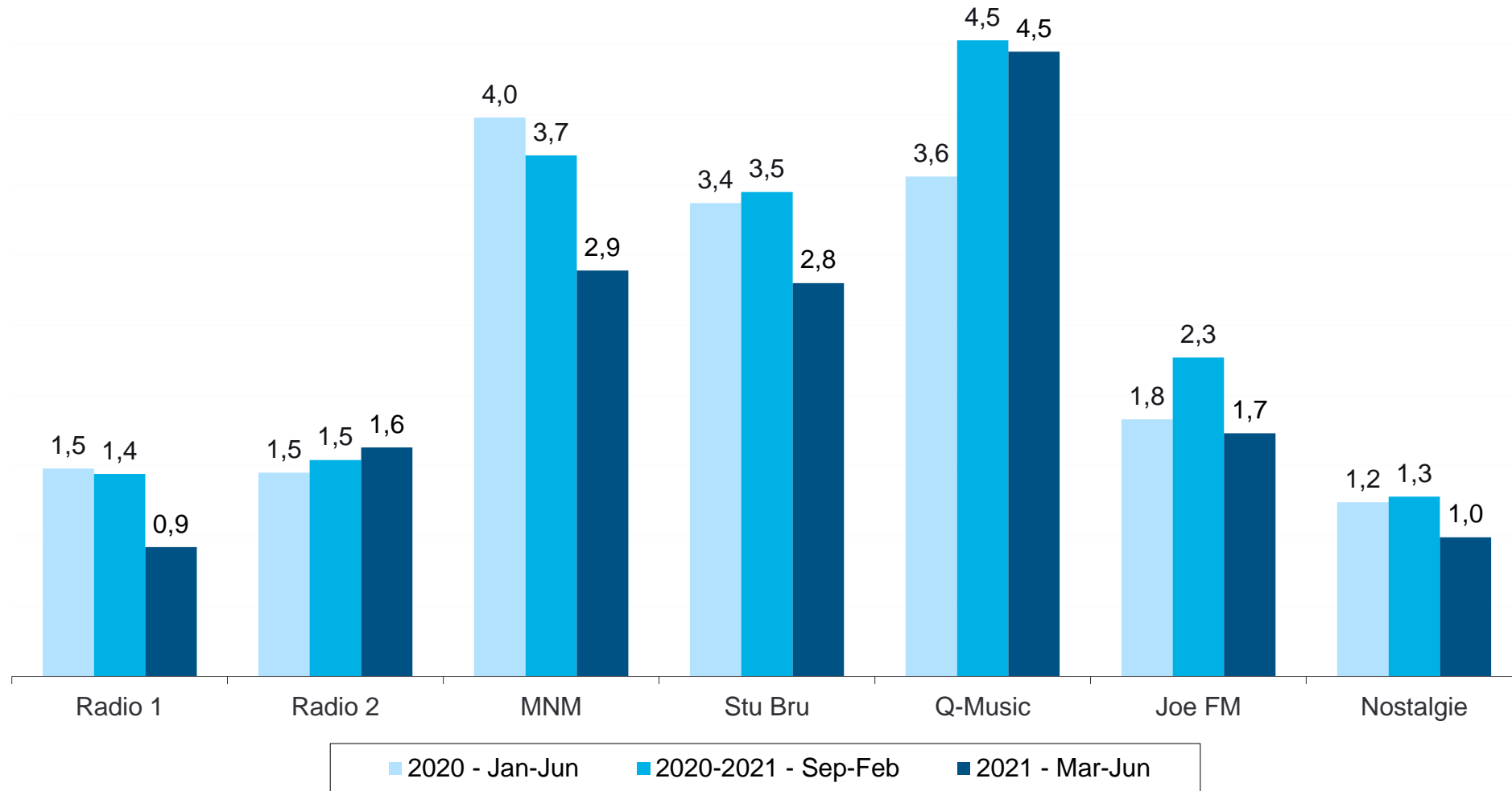
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	2.945.040	11	L'Avenir.net	1.446.648
2	Nieuwsblad	2.858.352	12	Gazet van Antwerpen	1.407.336
3	RTBF.be	2.083.200	13	2dehands.be/2ememain.be	1.359.120
4	Sudinfo	2.080.764	14	De Standaard	1.298.304
5	VRT	2.062.032	15	De Morgen	1.235.220
6	DH.be	1.717.296	16	Knack/Le Vif	1.220.352
7	Sporza	1.712.592	17	La Libre.be	1.177.764
8	Le Soir	1.708.980	18	Buienradar	1.103.592
9	RTL.be	1.681.848	19	7sur7.be	1.022.784
10	Immoweb	1.521.912	20	Flair	1.017.324



Key Radio figures

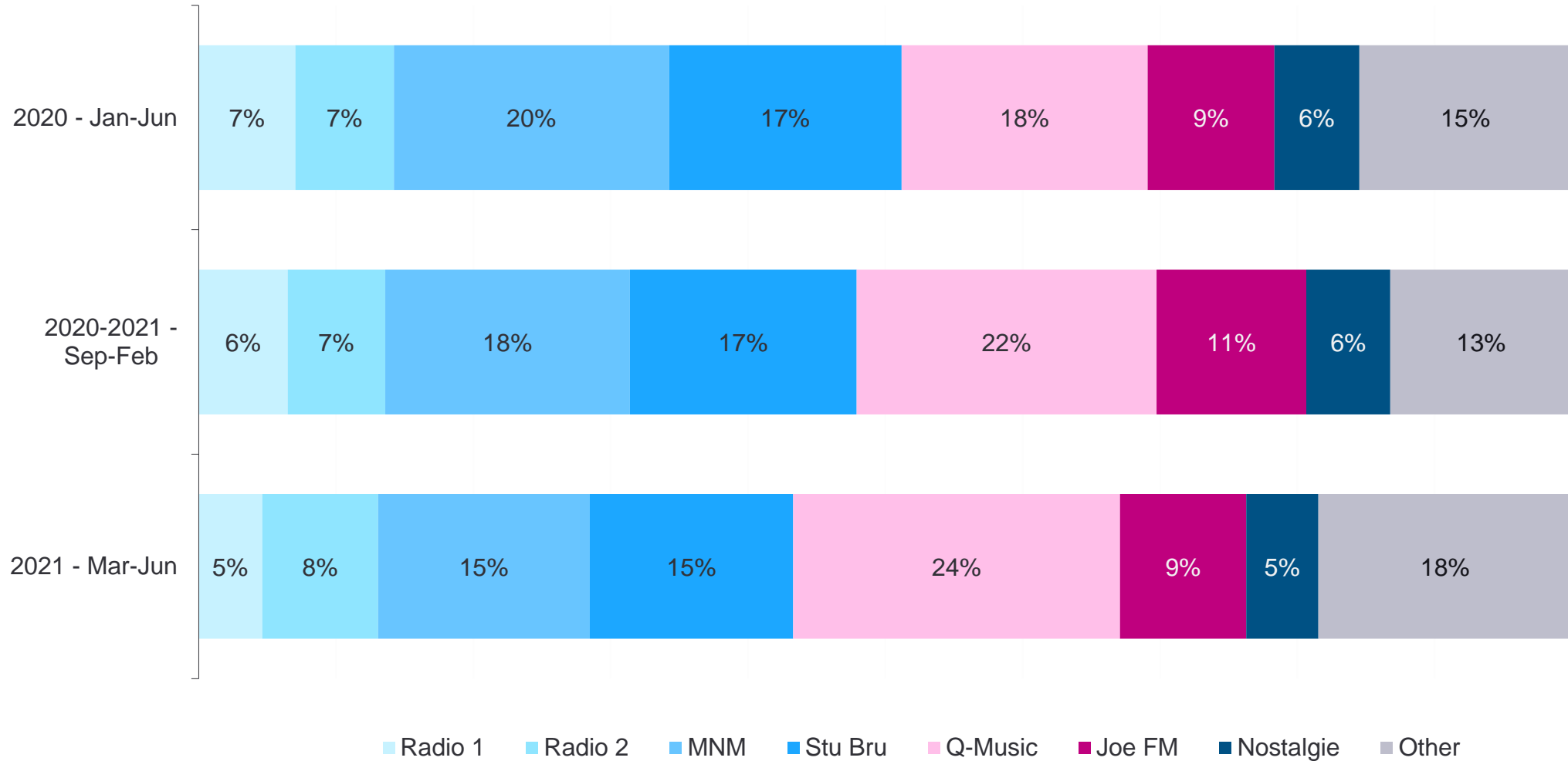
KEY RADIO FIGURES NORTH

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



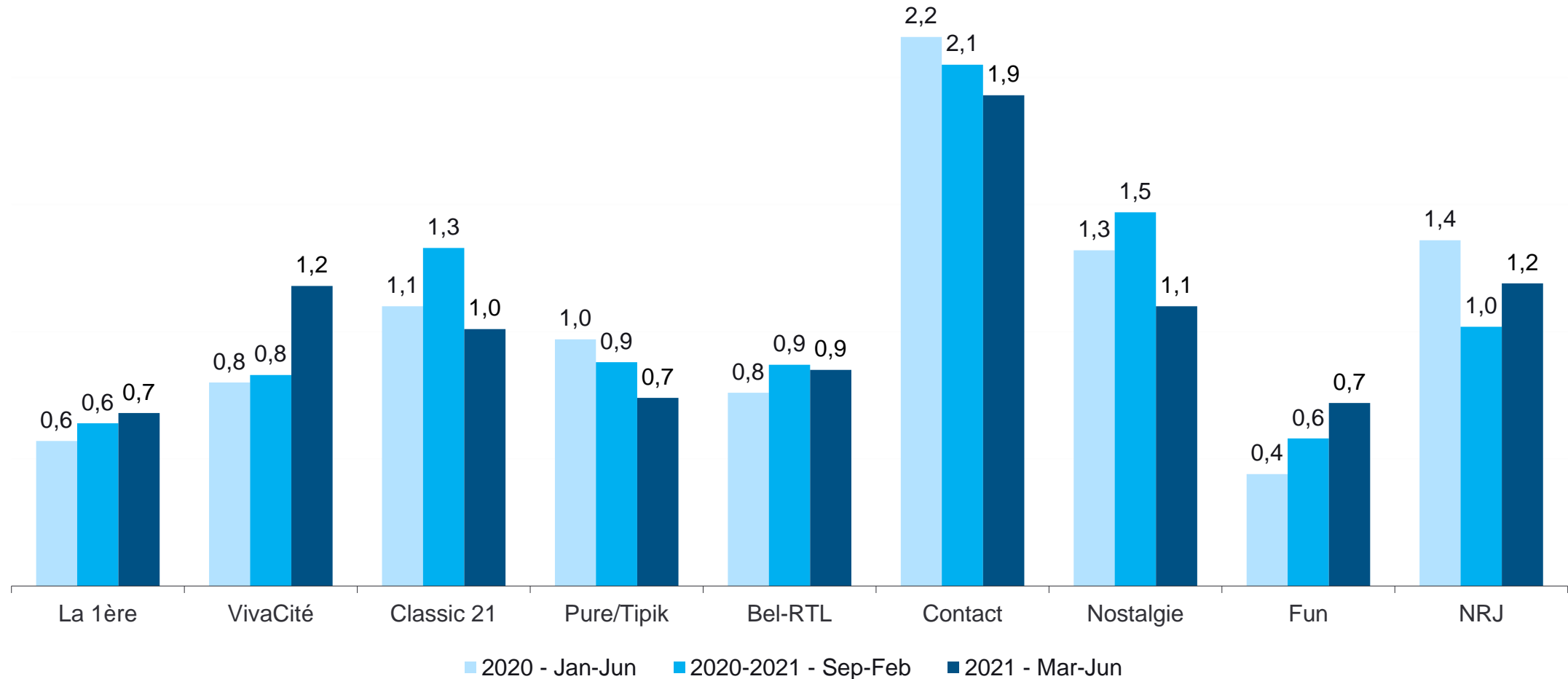
KEY RADIO FIGURES NORTH

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



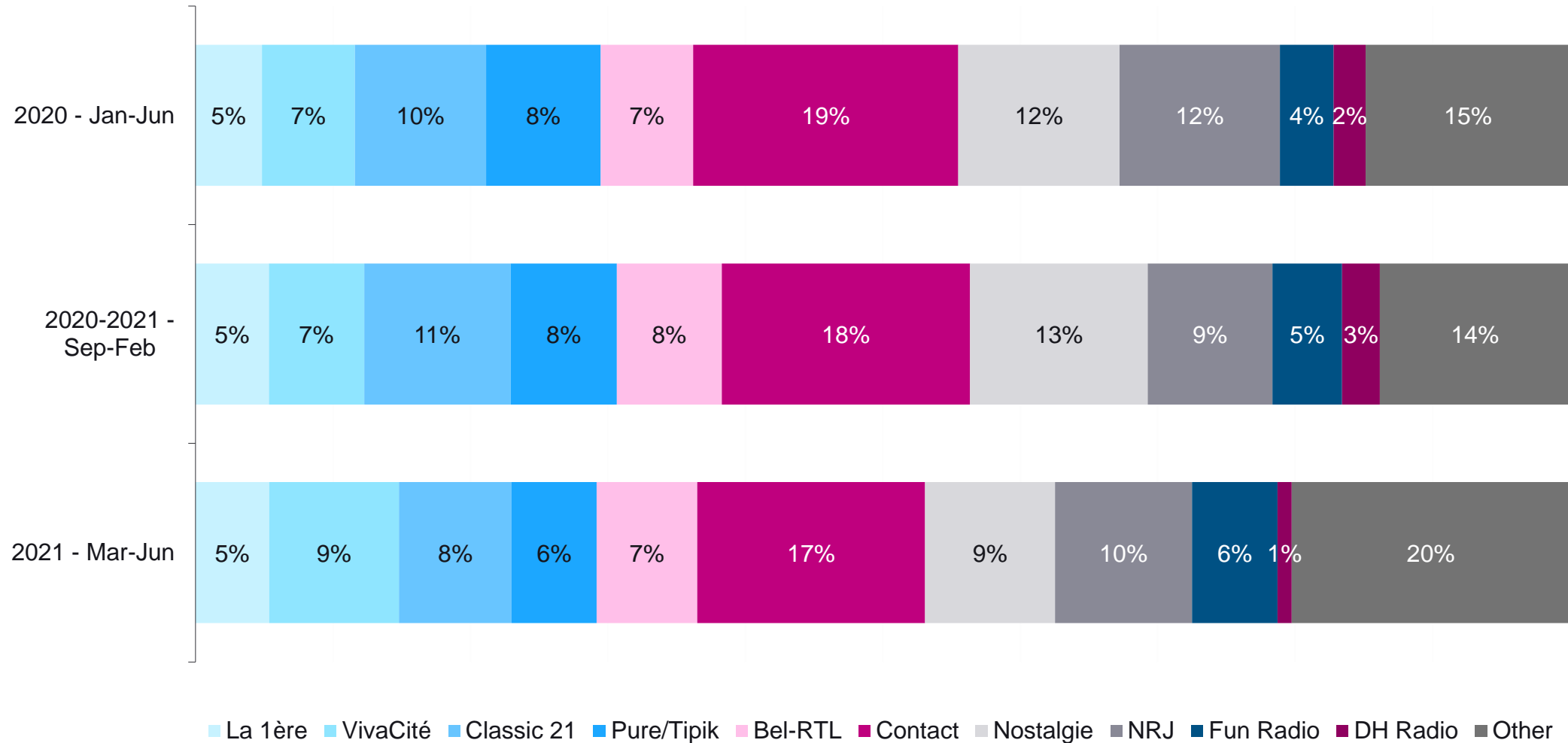
KEY RADIO FIGURES SOUTH

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
Het Laatste Nieuws/De Nieuwe Gazet	230.054	↓ 95	14%	↑ 126
Het Nieuwsblad/De Gentenaar	204.678	↓ 97	10%	↑ 116
De Standaard	110.868	↑ 106	36%	↑ 120
Het Belang van Limburg	84.900	↓ 98	12%	↑ 111
Gazet van Antwerpen	72.417	↓ 95	13%	↑ 109
De Tijd	49.927	↑ 109	51%	↑ 110
De Morgen	46.618	↓ 98	43%	↑ 109
Total North	799.462	↓ 98	20%	↑ 119

SOUTH	Circulation	vs 2019	Digital Part	vs 2019
Le Soir	73.639	↑ 120	56%	↑ 172
L'Avenir	69.087	↓ 92	9%	↓ 76
Sud Presse	69.052	↓ 94	21%	↑ 121
La Libre Belgique	40.956	↑ 109	39%	↑ 129
La DH	31.928	↓ 91	21%	↑ 124
L'Echo	16.917	↑ 101	53%	↑ 106
Grenz Echo	8.449	↓ 88	12%	↑ 163
Total South	310.028	→ 100	30%	↑ 138

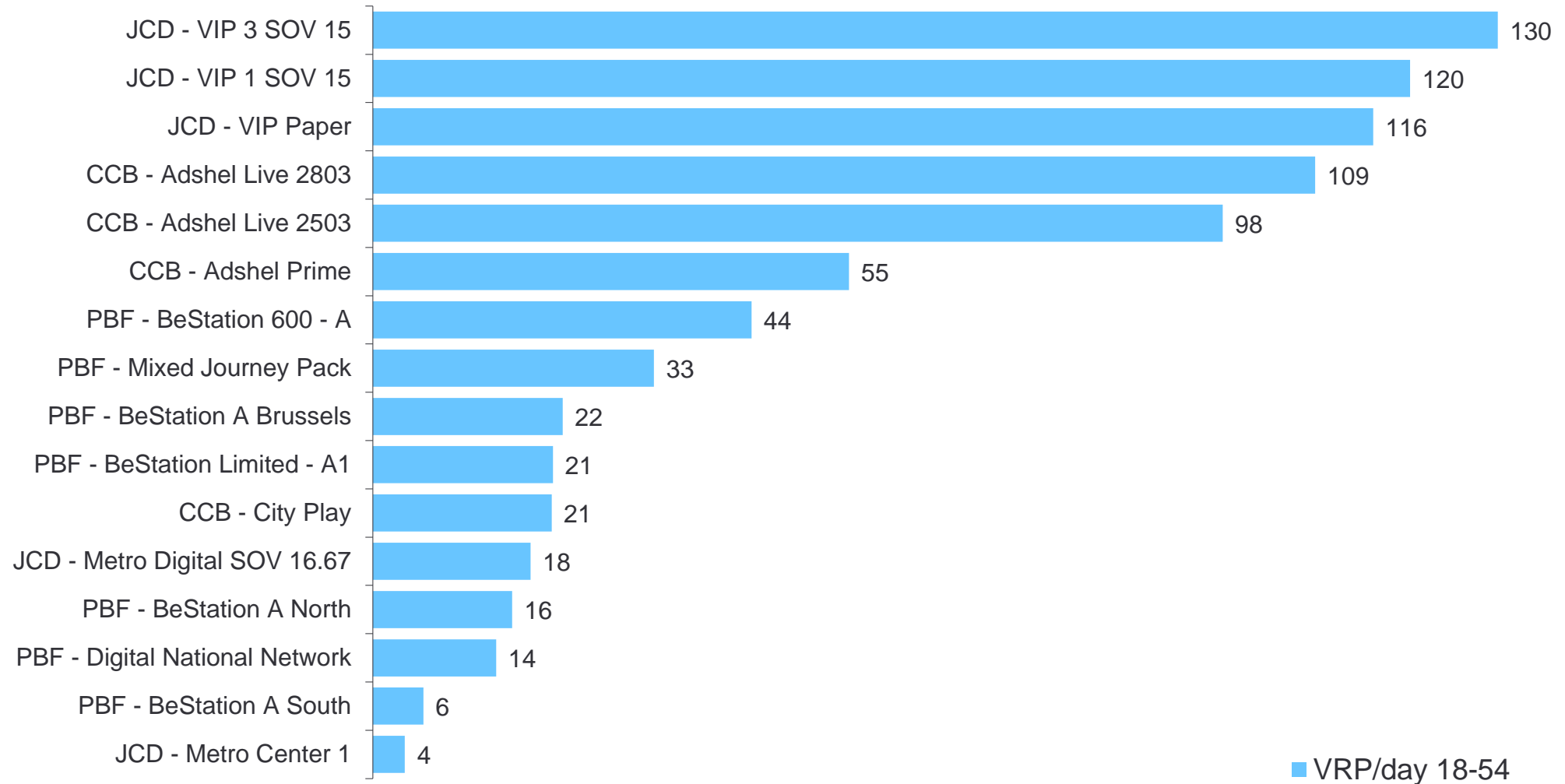
Key Print Figures - Magazines Circulation - Year 2020 (Paid + Free - digital sales included)

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

