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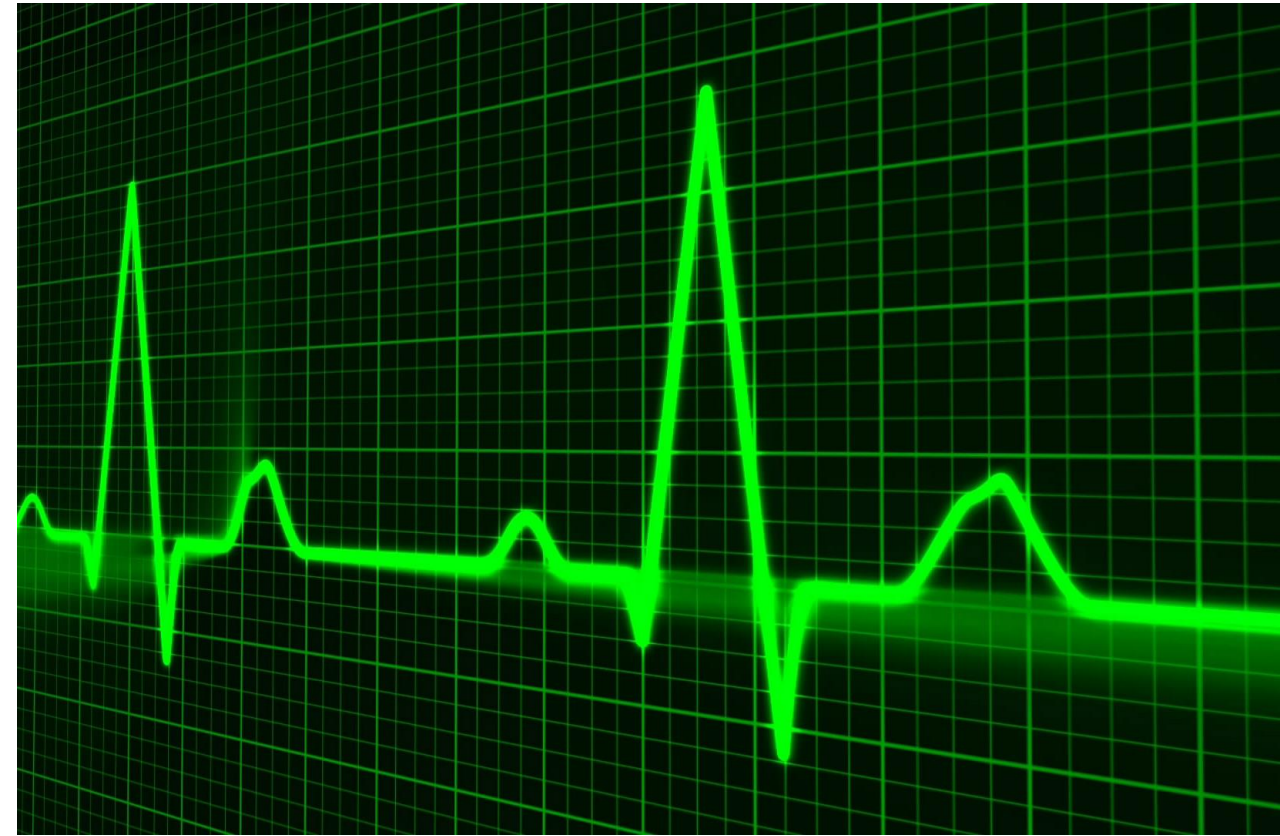
CONNECTIONS AGENCY



intelligence  
Market & Business

# MARKET PERFORMANCES BAROMETER

July 2020



# Gross Media Investments Evolution

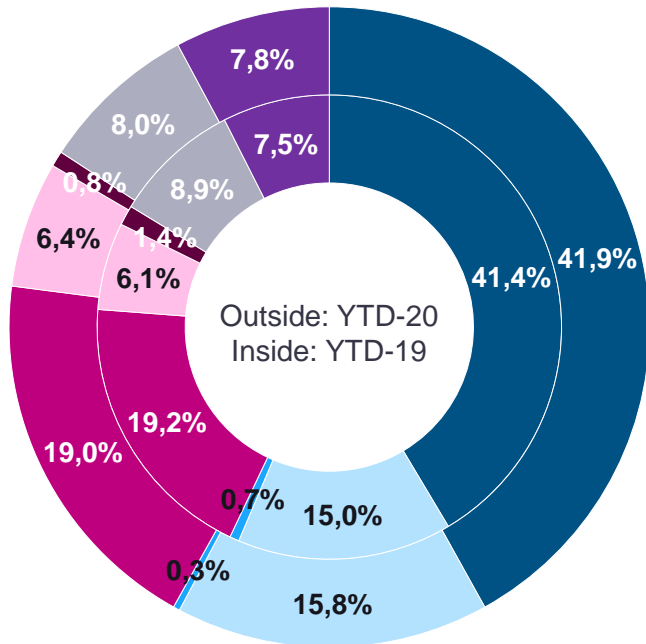
# GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Jun 2020

NB : No Internet figures in MDB for 2019 & 2020

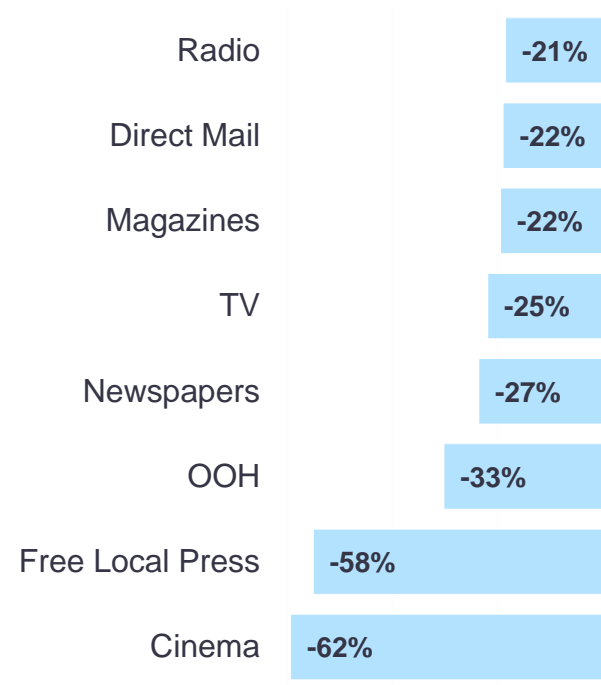
Market	National	North	South
<ul style="list-style-type: none"> <li>■ € Mo</li> <li>■ vs YTD-19</li> <li>■ % Region</li> </ul>	1.389,8 - 25,8% 100%	851,0 - 25,6% 61%	538,8 - 26,0% 39%

**Media Mix Evol.**

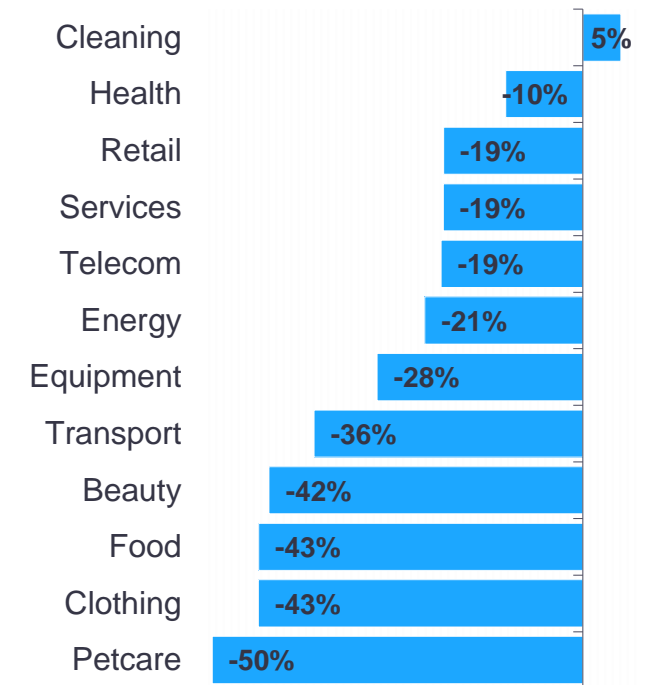
- TV
- Radio
- Cinema
- Newspapers
- Magazines
- Free Local Press
- OOH
- Direct Mail



**Media Evol. (vs YTD-19)**



**EcoGroups Evol. (vs YTD-19)**



# MDB TOP 30 ADVERTISERS - Jan-Jun 2020

NB : No Internet figures in MDB for 2019 & 2020

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
1	COLRUYT GROUP	52,9	↑ 111
2	PROCTER & GAMBLE	46,7	↓ 93
3	AHOLD DELHAIZE	24,2	↑ 109
4	D'IETEREN GROUP	20,9	↓ 57
5	PSA GROUPE	17,7	↓ 53
6	RECKITT & BENCKISER	17,5	↓ 65
7	TELENET GROUP HOLDING	16,5	↓ 89
8	ALDI	15,8	↑ 141
9	UNILEVER	15,6	↓ 54
10	PROXIMUS GROUP	14,3	↓ 58
11	RENAULT-NISSAN ALLIANCE	14,2	↓ 78
12	ORANGE	13,2	↓ 86
13	NETHYS	11,3	↑ 131
14	CARREFOUR GROUP	11,2	↓ 71
15	LOTERIE NATIONALE	10,6	↓ 98

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
16	VINTED	10,2	↓ 55
17	THE WALT DISNEY COMPANY	10,0	↓ 77
18	GROUPE 3 SUISES	9,9	→ 100
19	LIDL & CO	9,9	↑ 109
20	BMW GROUP BELGIUM	9,7	↑ 118
21	BEIERSDORF	9,7	↓ 84
22	NESTLE GROUP	9,6	↑ 154
23	AS WATSON	9,6	→ 100
24	PEPSICO	9,5	↑ 119
25	THE COCA-COLA COMPANY	8,7	↓ 31
26	L'OREAL GROUP	8,7	↓ 60
27	HENKEL	8,6	↑ 147
28	FERRERO	8,3	↓ 47
29	BNP-PARIBAS	8,2	↑ 108
30	PERRIGO	7,7	→ 99



# Key TV figures

# Key TV figures North - Jul-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Jul-20	YTD	Jul-20	YTD	Jul-20	YTD
VTM	PRP 18-54	4,8	6,9	23,8	25,3	698	818
Q2	PRP 18-44	1,2	1,7	7,0	7,2	893	805
VITAYA	PRP 18-54	1,1	1,2	5,2	4,5	495	588
CAZ	MEN 18-54	0,6	0,6	3,4	2,4	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	1,7	3,0	8,7	11,0	622	952
VIJF	PRP 18-54	0,9	1,6	4,3	5,8	751	769
ZES	PRP 18-54	0,6	0,6	2,9	2,3	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	20,1	27,4				
Total TV	PRP 18-44	16,9	23,7				
Total TV	MEN 18-54	16,3	22,6				

# Key TV indexes North - Jul-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	
		Jul-20	YTD	Jul-20	YTD	Jul-20	YTD
VTM	PRP 18-54	↑ 125	↑ 111	↑ 130	↑ 107	✗ 105	✓ 96
Q2	PRP 18-44	↑ 112	↑ 105	↑ 119	↑ 102	✗ 144	⚠ 101
VITAYA	PRP 18-54	↓ 67	↓ 88	↓ 70	↓ 86	✓ 90	✓ 83
CAZ	MEN 18-54	↑ 122	↑ 115	↑ 131	↑ 111	Package	Package
VIER	PRP 18-54	↔ 101	↓ 95	↑ 106	↓ 91	✓ 86	✗ 102
VIJF	PRP 18-54	↓ 86	↑ 103	↓ 89	↔ 100	✗ 128	✓ 100
ZES	PRP 18-54	↑ 113	↑ 111	↑ 117	↑ 107	Package	Package
Total TV	PRP 18-54	↓ 96	↑ 104				
Total TV	PRP 18-44	↓ 94	↑ 103				
Total TV	MEN 18-54	↓ 94	↑ 104				

# Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Jul - 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
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	28,2%	28,2%	27,9%	<b>30,6%</b>	110
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	85,6%	83,5%	81,6%	<b>79,2%</b>	97
	VHS + DVD player + Blu-Ray	"	4,0%	3,6%	2,5%	<b>2,4%</b>	96
	Video on demand + Digital recorder	"	9,1%	11,4%	14,3%	<b>16,9%</b>	118
	Game console and other devices (3)	"	1,3%	1,5%	1,6%	<b>1,5%</b>	93
<b>% Time shift viewing (4)</b>	All Channels	"	23,5%	24,7%	29,2%	<b>32,5%</b>	111
	Main Channels (5)	"	26,3%	29,5%	33,1%	<b>36,1%</b>	109
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	88	86	86	<b>86</b>	
	Main channels (5) - TSV	"	30	34	35	<b>37</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	108	105	96	<b>99</b>	103
	All TV channels (TSV)	"	28	29	32	<b>37</b>	117
	All TV channels (Live + TSV)	"	136	134	127	<b>136</b>	107
	Other TV Screen Usage	"	30	35	37	<b>47</b>	125
	Total TV Screen Usage	"	166	169	165	<b>183</b>	111



## Key TV figures South - Jul-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Jul-20	YTD	Jul-20	YTD	Jul-20	YTD
RTL-TVI	PRP 18-54	5,1	7,1	25,5	27,1	587	654
Club-RTL	MEN 18-54	0,8	1,0	5,8	5,3	625	1.004
Plug-RTL	ALL 15-34	0,5	0,7	4,9	4,4	419	616
TF1	PRP 18-54	2,6	3,4	13,1	12,9	388	495
La Une	PRP 18-54	2,7	4,0	13,6	15,3	419	619
La Deux	PRP 18-54	1,1	1,4	5,4	5,3	382	576
AB3	PRP 18-44	1,3	1,7	7,8	7,4	328	702
TTV	PRP 18-54	20,1	26,2				
TTV	PRP 18-44	16,7	22,4				
TTV	ALL 15-34	10,8	14,9				
TTV	MEN 18-54	14,2	19,1				

# Key TV indexes South - Jul-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	
		Jul-20	YTD	Jul-20	YTD	Jul-20	YTD
RTL-TV1	PRP 18-54	↑ 102	↑ 104	↑ 109	↑ 104	✗ 120	✓ 87
Club-RTL	MEN 18-54	↓ 79	↓ 73	↓ 93	↓ 77	✗ 118	✗ 122
Plug-RTL	ALL 15-34	↑ 136	↑ 105	↑ 159	↑ 107	✓ 86	✓ 85
TF1	PRP 18-54	↑ 103	↑ 113	↑ 109	↑ 114	✓ 95	✓ 78
La Une	PRP 18-54	↓ 93	↑ 111	↔ 99	↑ 112	✗ 118	✓ 100
La Deux	PRP 18-54	↓ 91	↑ 104	↓ 98	↑ 104	✗ 114	✓ 98
AB3	PRP 18-44	↓ 78	↓ 68	↓ 84	↓ 68	✓ 96	✗ 117
TTV	PRP 18-54	↓ 94	→ 100				
TTV	PRP 18-44	↓ 93	→ 100				
TTV	ALL 15-34	↓ 85	↓ 98				
TTV	MEN 18-54	↓ 85	↓ 95				

# Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Jul - 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
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	32,4%	31,7%	31,2%	<b>34,0%</b>	109
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	78,5%	75,8%	73,5%	<b>67,2%</b>	92
	VHS + DVD player + Blu-Ray	"	7,2%	6,6%	4,8%	<b>4,0%</b>	82
	Video on demand + Digital recorder	"	13,6%	16,9%	20,6%	<b>27,5%</b>	134
	Game console and other devices (3)	"	0,7%	0,8%	1,1%	<b>1,3%</b>	116
<b>% Time shift viewing (4)</b>	All Channels	"	17,9%	19,9%	21,3%	<b>24,2%</b>	113
	Main Channels (5)	"	19,6%	20,5%	21,6%	<b>24,8%</b>	115
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	89	83	88	<b>89</b>	
	Main channels (5) - TSV	"	51	50	51	<b>50</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	141	130	126	<b>119</b>	95
	All TV channels (TSV)	"	26	26	27	<b>31</b>	112
	All TV channels (Live + TSV)	"	167	156	153	<b>150</b>	98
	Other TV Screen Usage	"	53	59	64	<b>86</b>	135
	Total TV Screen Usage	"	220	214	217	<b>236</b>	109



# Top websites

# Key Digital Figures - TOP BELGIAN WEBSITES - Jul-20

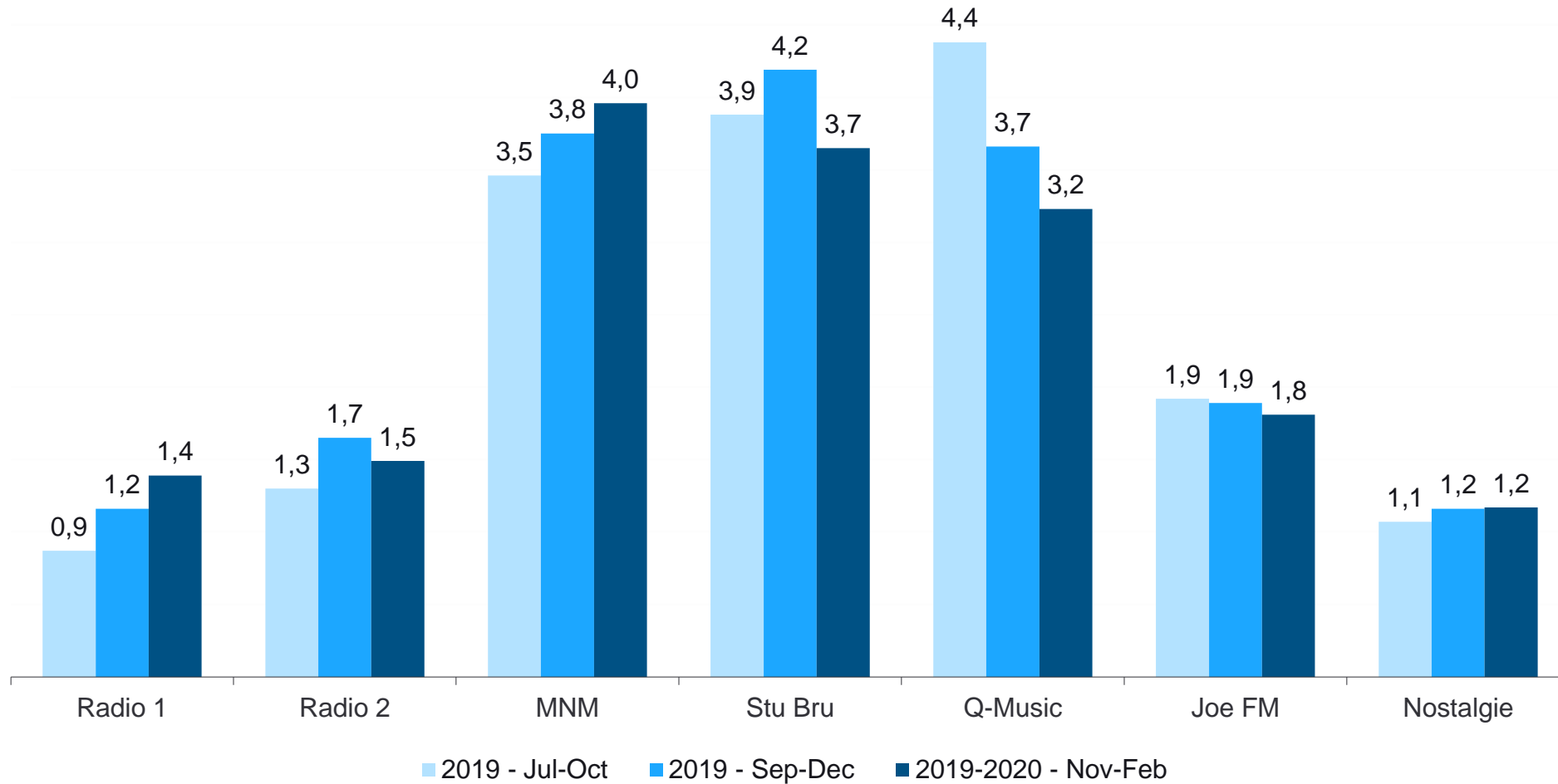
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.240.216	11	De Standaard	1.546.692
2	Nieuwsblad	3.042.984	12	Knack/Levif	1.524.600
3	VRT	2.465.820	13	Flair	1.497.720
4	RTBF.be	2.262.204	14	Sudpresse Editions Digitales	1.485.960
5	Sudinfo	2.126.292	15	L'Avenir.net	1.339.968
6	2dehands.be/2ememain.be	2.112.516	16	Gazet van Antwerpen	1.317.792
7	RTL.be	1.949.976	17	De Morgen	1.263.696
8	DH.be	1.931.412	18	La Libre.be	1.225.560
9	Immoweb	1.790.628	19	Vlan.be	1.080.072
10	Le Soir	1.679.076	20	Zimmo	1.052.352



# Key Radio figures

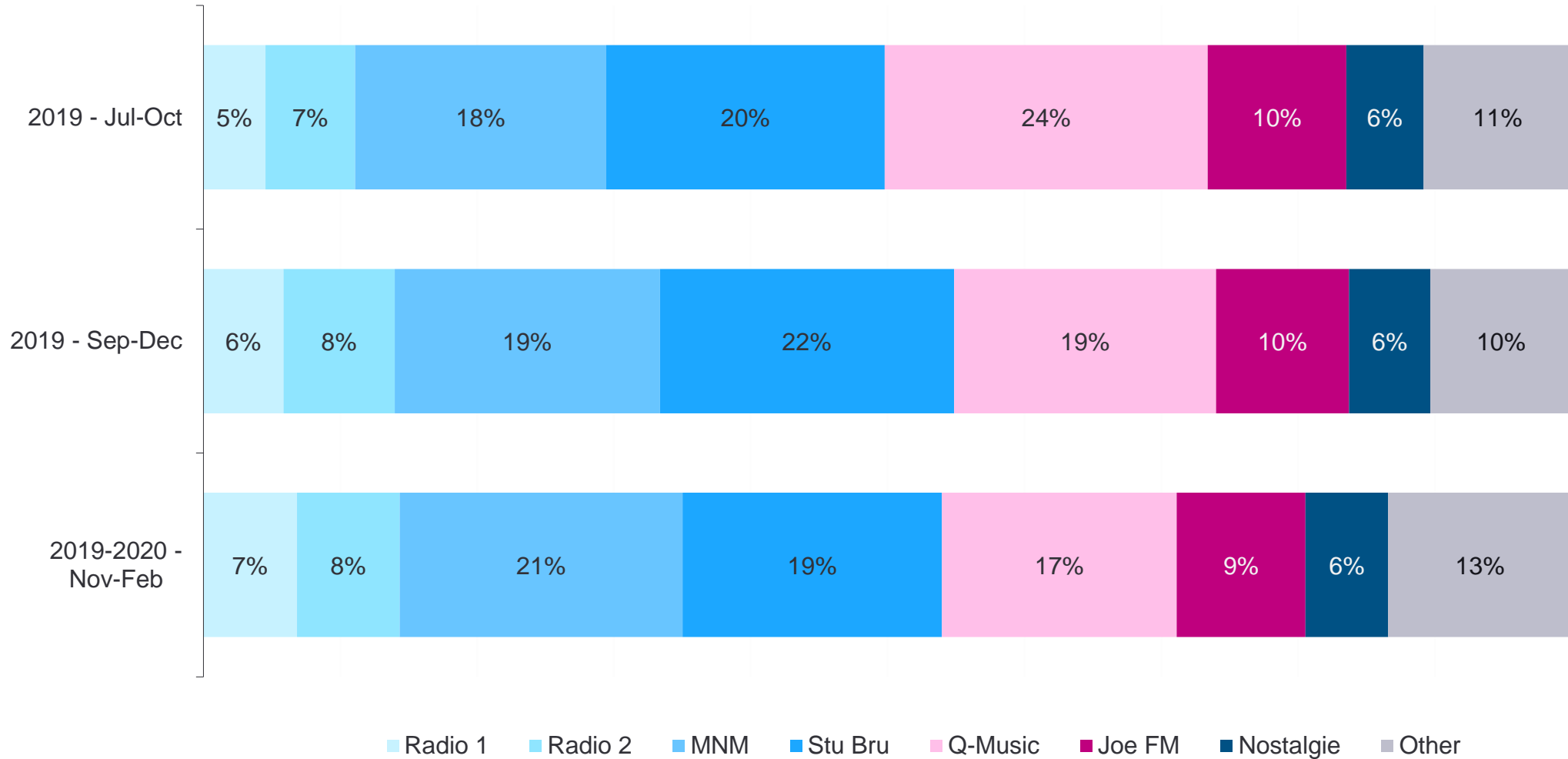
# KEY RADIO FIGURES NORTH

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



# KEY RADIO FIGURES NORTH

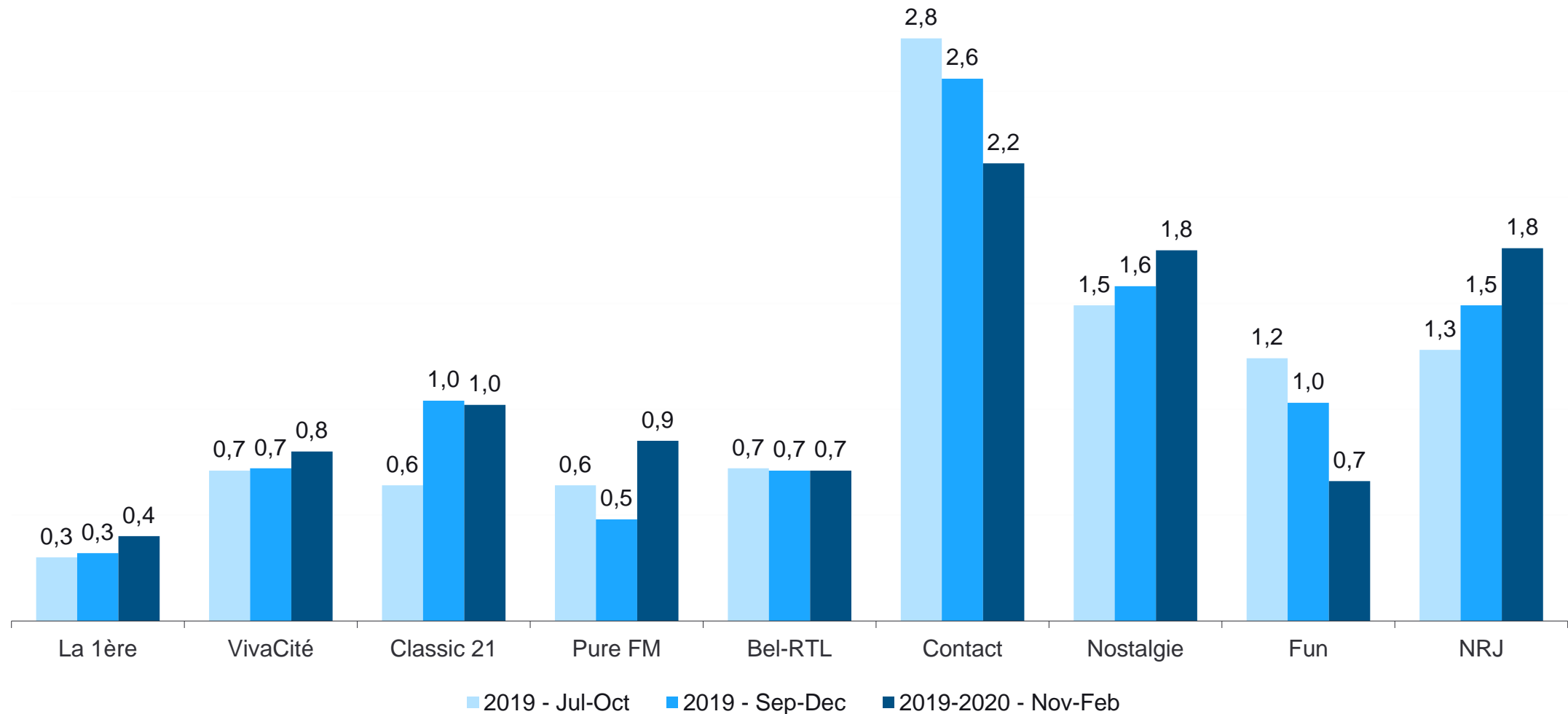
Audience Shares (%) on ALL 18-44 - 07:00-19:00





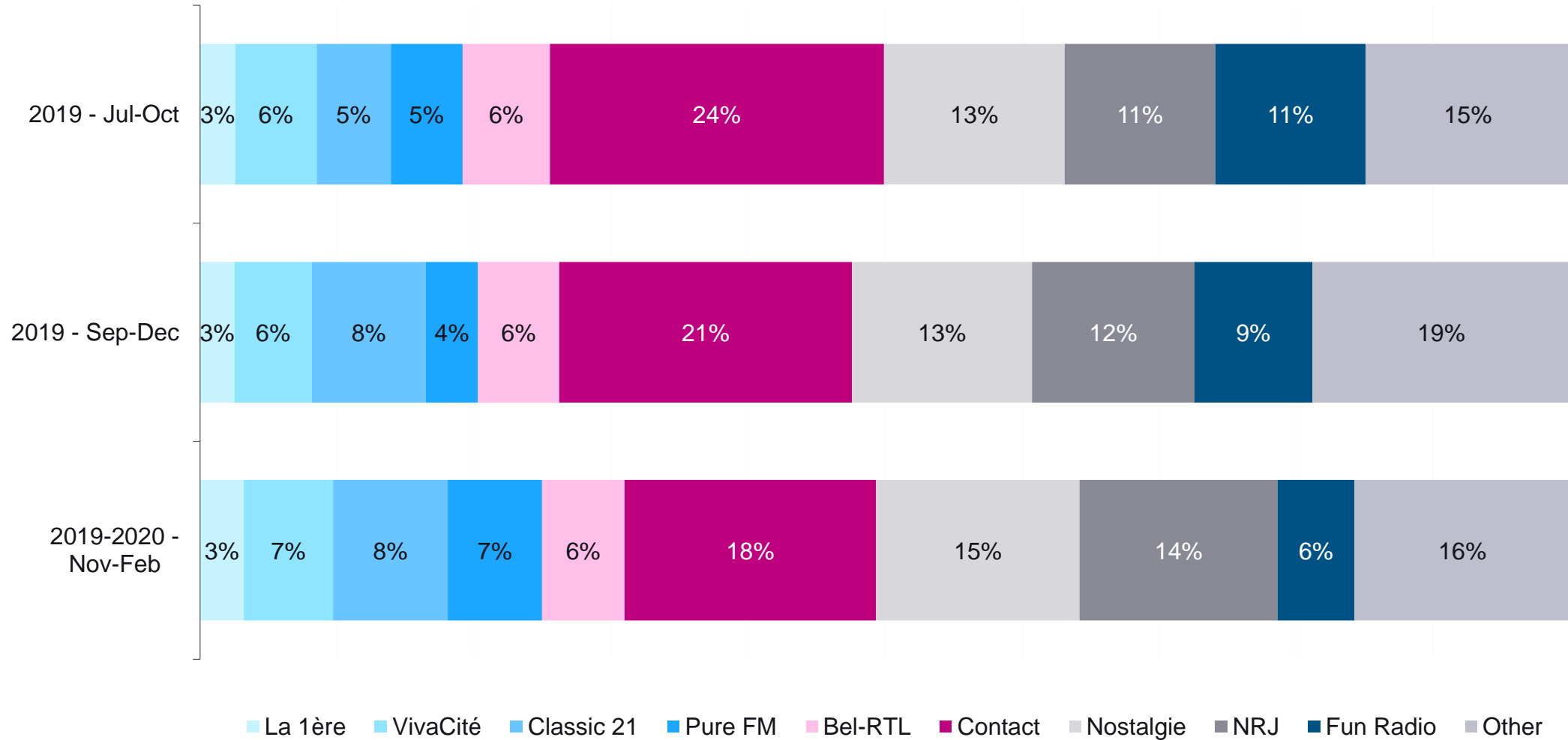
# KEY RADIO FIGURES SOUTH

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
<b>Total North</b>	<b>814.727</b>	<b>↓ 96</b>	<b>17%</b>	<b>↑ 120</b>

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
<b>Total South</b>	<b>312.699</b>	<b>↑ 102</b>	<b>23%</b>	<b>↑ 148</b>

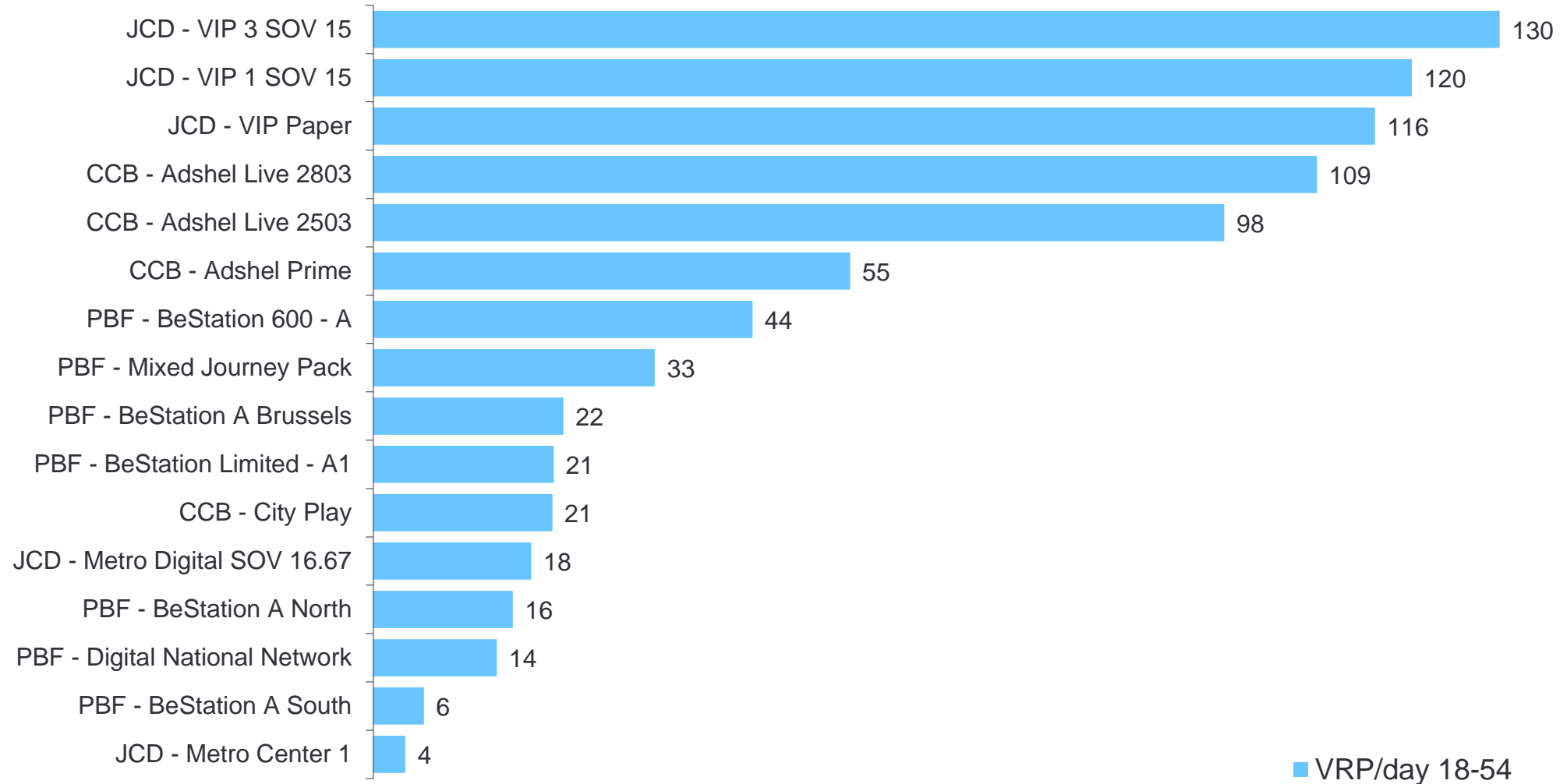
# Key Print Figures - Magazines Circulation - Year 2019 (Paid + Free - digital sales included)

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
<b>TOTAL</b>	<b>1.107.829</b>	<b>↓ 96</b>	<b>715.854</b>	<b>↓ 94</b>	<b>230.330</b>	<b>↓ 88</b>	<b>2.054.013</b>	<b>↓ 94</b>



# 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

