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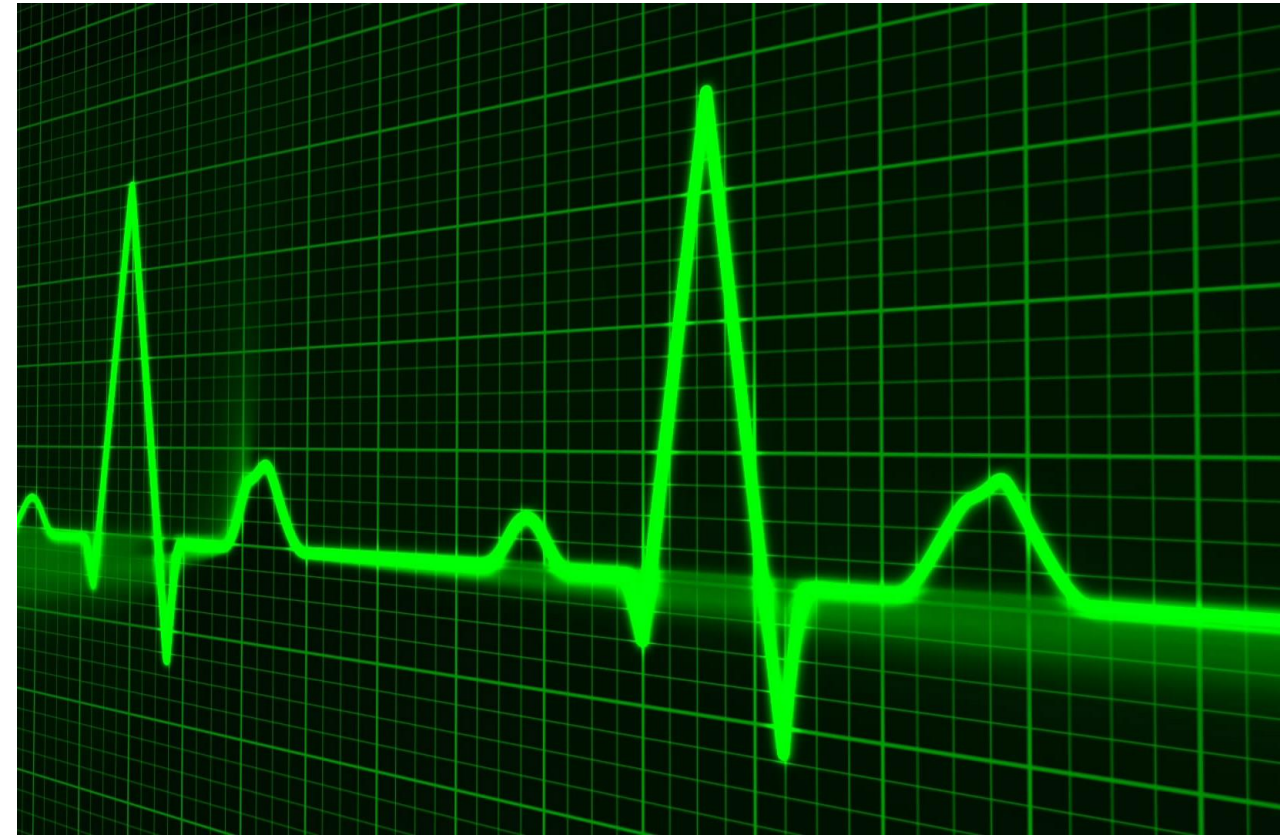
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

April 2021



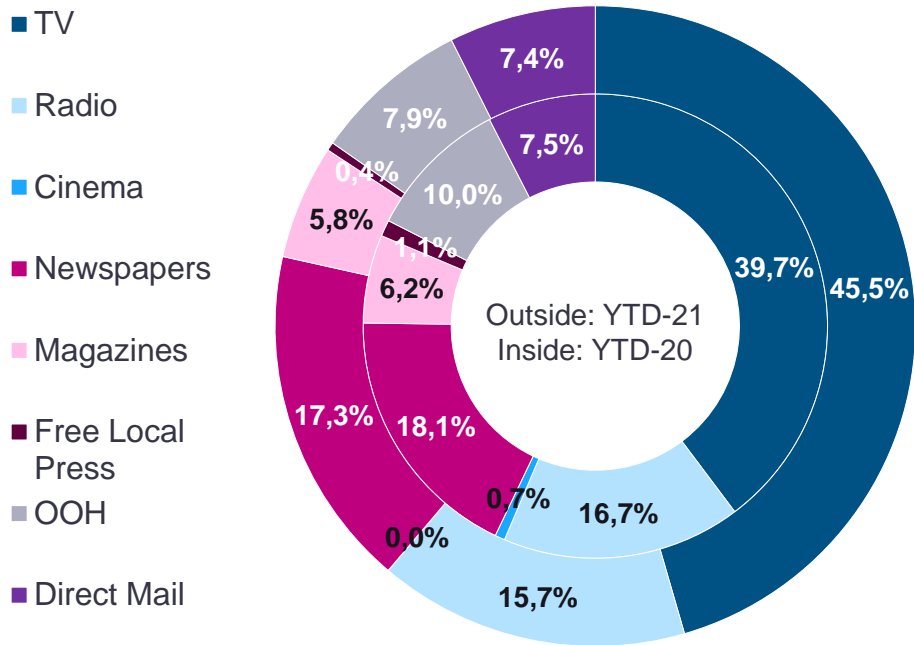
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Mar 2021

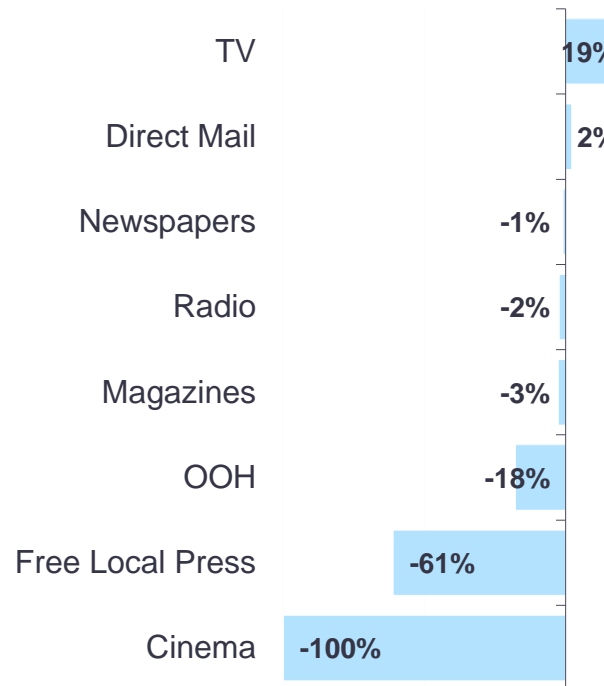
NB : No Internet figures in MDB for 2020 & 2021

Market	National	North	South
<ul style="list-style-type: none"> ▪ € Mo ▪ vs YTD-20 ▪ % Region 	800,6 + 3,8% 100%	481,2 + 4,7% 60%	319,4 + 2,5% 40%

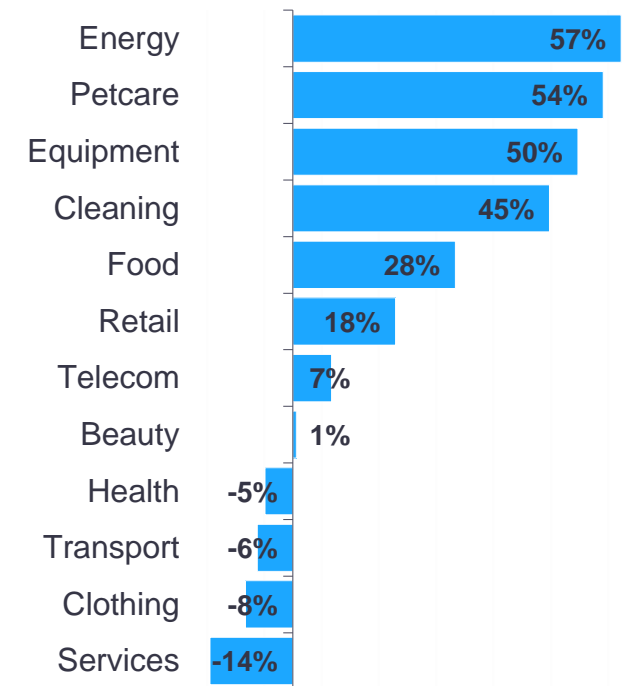
Media Mix Evol.



Media Evol. (vs YTD-20)



EcoGroups Evol. (vs YTD-20)



MDB TOP 30 ADVERTISERS - Jan-Mar 2021

NB : No Internet figures in MDB for 2020 & 2021

Rank	ADV.GROUP	Gross Inv.	vs 2020
1	COLRUYT GROUP	35,3	↑ 165
2	PROCTER & GAMBLE BENELUX	28,7	↑ 128
3	D'IETEREN GROUP	21,2	↑ 105
4	AHOLD DELHAIZE	16,6	↑ 149
5	PSA GROUPE	13,8	↓ 92
6	THE COCA-COLA COMPANY	12,8	↑ 165
7	RENAULT-NISSAN ALLIANCE	11,1	↓ 95
8	PROXIMUS GROUP	10,6	↑ 151
9	TELENET GROUP HOLDING	10,4	↑ 134
10	RECKITT & BENCKISER	9,4	↑ 135
11	BMW GROUP BELGIUM	8,0	↑ 177
12	UNILEVER	7,3	↑ 118
13	LOTERIE NATIONALE	7,2	↑ 112
14	HENKEL	6,9	↑ 203
15	VINTED	6,9	↑ 109

Rank	ADV.GROUP	Gross Inv.	vs 2020
16	NETHYS	6,9	↑ 125
17	AS WATSON	6,2	↑ 152
18	FERRERO	6,2	↓ 97
19	NESTLE GROUP	5,8	↑ 170
20	L'OREAL GROUP	5,8	↑ 116
21	LIDL & CO	5,7	↑ 192
22	CARREFOUR GROUP	5,4	↑ 112
23	MONDELEZ INTERNATIONAL	5,3	↑ 107
24	COOLBLUE	5,2	↑ 452
25	ENGIE	5,0	↑ 353
26	HELLOFRESH	4,8	↑ 166
27	ORANGE	4,7	↓ 54
28	THE WALT DISNEY COMPANY	4,7	↓ 74
29	GROUPE 3 SUISES	4,6	↓ 94
30	BEIERSDORF	4,5	↓ 85



Key TV figures

Key TV figures North - Apr-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Apr-21	YTD	Apr-21	YTD	Apr-21	YTD
VTM	PRP 18-54	6,9	7,0	26,2	25,7	35,7	112,9
VTM2	PRP 18-54	1,6	1,6	6,1	6,0	8,3	26,2
VTM3	PRP 18-54	0,8	1,0	3,0	3,8	4,9	14,8
VTM4	MEN 18-54	0,7	0,6	3,2	2,7	3,1	9,0
Play4	PRP 18-54	4,3	3,5	16,2	12,9	19,6	60,5
Play5	PRP 18-54	1,1	1,2	4,2	4,5	7,8	24,3
Play6	PRP 18-54	0,6	0,6	2,2	2,3	3,2	10,5
Total TV	PRP 18-54	26,5	27,1				
Total TV	MEN 18-54	21,1	21,9				

Key TV indexes North - Apr-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	
		Apr-21	YTD	Apr-21	YTD	Apr-21	YTD
VTM	PRP 18-54	↓ 77	↓ 86	↓ 97	↓ 98	↑ 178	↑ 131
VTM2	PRP 18-54	↓ 79	↓ 91	↔ 99	↑ 102	↑ 239	↑ 154
VTM3	PRP 18-54	↓ 59	↓ 78	↓ 74	↓ 89	↑ 191	↑ 136
VTM4	MEN 18-54	↑ 140	↑ 118	↑ 179	↑ 135	↑ 193	↑ 147
Play4	PRP 18-54	↓ 88	↔ 99	↑ 111	↑ 112	↑ 275	↑ 149
Play5	PRP 18-54	↓ 61	↓ 70	↓ 77	↓ 79	↑ 252	↑ 130
Play6	PRP 18-54	↓ 91	↓ 98	↑ 113	↑ 111	↑ 234	↑ 143
Total TV	PRP 18-54	↓ 80	↓ 88				
Total TV	MEN 18-54	↓ 78	↓ 87				

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 great caution.

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

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

Source: CIM TV - Live +7 including guests

Variable	Channel	Daypart	YTD-17	YTD-18	YTD-19	YTD-20	21 vs 20
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	31,0%	30,1%	33,8%	32,0%	95
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	84,0%	82,4%	80,4%	74,0%	92
	VHS + DVD player + Blu-Ray	"	3,5%	2,4%	2,1%	2,2%	104
	Video on demand + Digital recorder	"	11,0%	13,6%	16,0%	22,4%	140
	Game console and other devices (3)	"	1,5%	1,6%	1,5%	1,3%	86
% Time shift viewing (4)	All Channels	"	26,2%	30,6%	32,9%	34,2%	104
	Main Channels (5)	"	29,9%	34,3%	37,0%	38,6%	104
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	87	88	86	82	
	Main channels (5) - TSV	"	35	35	35	36	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	112	101	109	88	81
	All TV channels (TSV)	"	33	35	42	38	92
	All TV channels (Live + TSV)	"	145	136	151	126	84
	Other TV Screen Usage	"	36	38	48	57	119
	Total TV Screen Usage	"	181	175	199	184	92

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 great caution.

Key TV figures South - Apr-21

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		Gross Invest. (€ Mo) Total Day	
		Apr-21	YTD	Apr-21	YTD	Apr-21	YTD
RTL-TVI	PRP 18-54	5,9	6,3	25,8	26,1	21,3	81,3
Club-RTL	MEN 18-54	1,4	1,1	8,1	6,1	3,9	12,1
Plug-RTL	ALL 15-34	0,7	0,6	5,3	5,0	1,8	6,4
TF1	PRP 18-54	3,1	3,1	13,8	12,8	4,2	16,6
La Une	PRP 18-54	3,5	4,1	15,3	16,9	8,9	32,3
Tipik	PRP 18-54	1,0	1,2	4,3	5,0	2,5	8,6
AB3	PRP 18-44	1,5	1,2	7,8	6,4	2,0	7,9
TTV	PRP 18-54	22,7	24,2				
TTV	PRP 18-44	18,7	19,2				
TTV	ALL 15-34	12,5	12,8				
TTV	MEN 18-54	17,0	18,5				

Key TV indexes South - Apr-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	
		Apr-21	YTD	Apr-21	YTD	Apr-21	YTD
RTL-TVI	PRP 18-54	↓ 61	↓ 81	↓ 85	↓ 96	↑ 186	↑ 133
Club-RTL	MEN 18-54	↑ 144	↔ 101	↑ 197	↑ 114	↑ 180	↑ 111
Plug-RTL	ALL 15-34	↓ 97	↓ 88	↑ 142	↑ 113	↑ 198	↑ 146
TF1	PRP 18-54	↓ 80	↓ 86	↑ 112	↑ 102	↑ 270	↑ 203
La Une	PRP 18-54	↓ 66	↓ 90	↓ 92	↑ 106	↑ 203	↑ 131
Tipik	PRP 18-54	↓ 59	↓ 78	↓ 82	↓ 92	↑ 168	↑ 115
AB3	PRP 18-44	↓ 83	↓ 64	↑ 126	↓ 83	↑ 118	↓ 75
TTV	PRP 18-54	↓ 72	↓ 85				
TTV	PRP 18-44	↓ 66	↓ 78				
TTV	ALL 15-34	↓ 68	↓ 78				
TTV	MEN 18-54	↓ 73	↓ 89				

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 great caution.

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

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

Source: CIM TV - Live +7 including guests

Variable	Channel	Daypart	YTD-17	YTD-18	YTD-19	YTD-20	21 vs 20
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	34,0%	33,2%	36,5%	33,4%	92
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	76,0%	74,2%	68,3%	64,4%	94
	VHS + DVD player + Blu-Ray	"	6,7%	5,3%	3,7%	3,4%	92
	Video on demand + Digital recorder	"	16,5%	19,5%	26,8%	31,4%	117
	Game console and other devices (3)	"	0,8%	1,0%	1,2%	0,7%	58
% Time shift viewing (4)	All Channels	"	21,4%	22,0%	24,0%	27,9%	116
	Main Channels (5)	"	22,7%	22,5%	24,5%	28,9%	118
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	87	88	87	89	
	Main channels (5) - TSV	"	51	52	50	54	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	137	132	128	104	81
	All TV channels (TSV)	"	30	30	33	32	95
	All TV channels (Live + TSV)	"	167	162	162	136	84
	Other TV Screen Usage	"	61	66	89	88	99
	Total TV Screen Usage	"	228	228	250	224	90

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 great caution.



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Apr-21

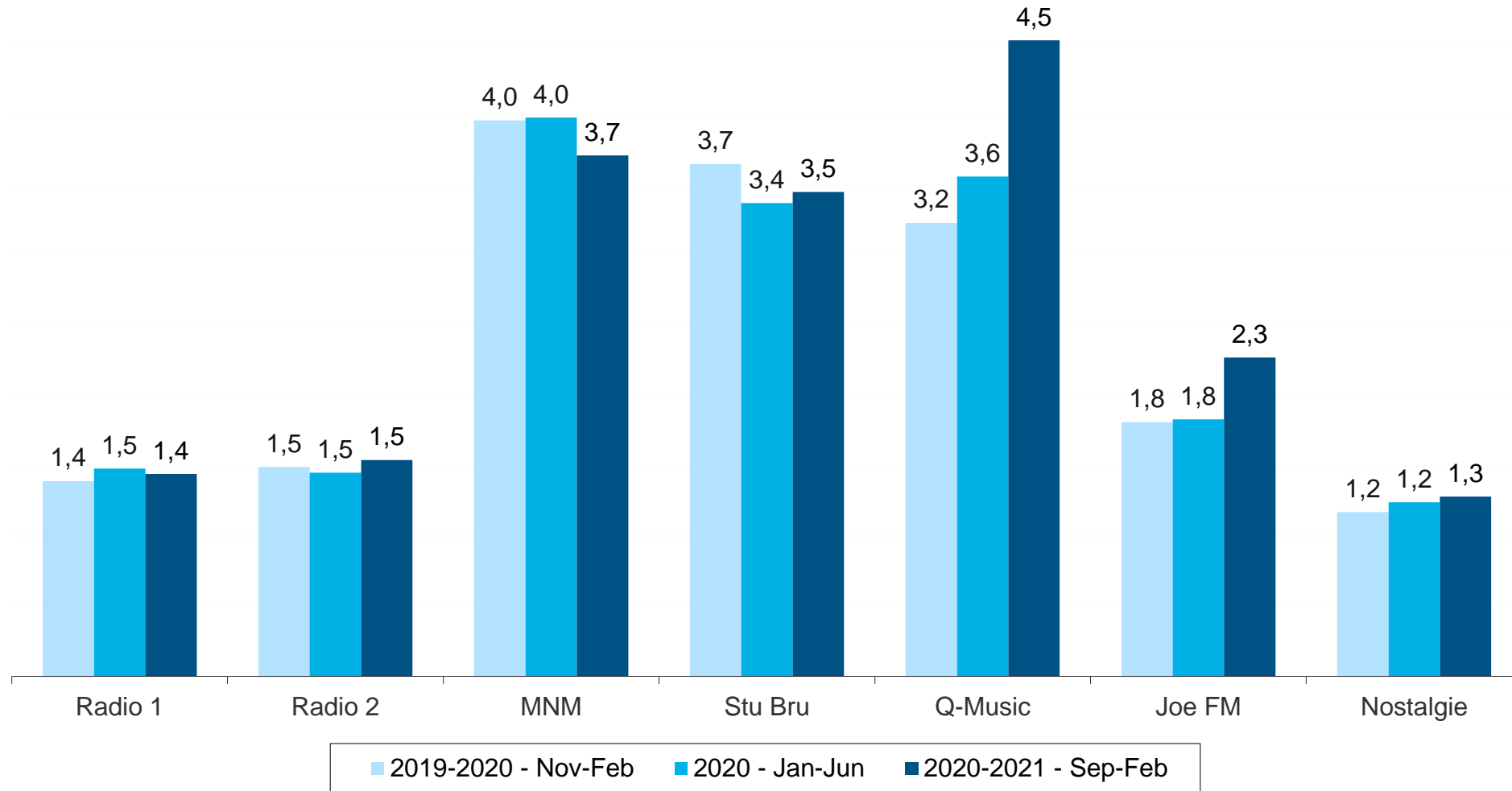
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	Nieuwsblad	2.926.140	11	Knack/Le Vif	1.479.576
2	HLN.be	2.921.016	12	L'Avenir.net	1.416.660
3	VRT	2.497.404	13	La Libre.be	1.393.476
4	RTBF.be	2.133.600	14	De Standaard	1.386.336
5	Sudinfo	2.112.432	15	De Morgen	1.367.688
6	2dehands.be/2ememain.be	2.025.156	16	Flair	1.233.456
7	DH.be	1.804.992	17	Gazet van Antwerpen	1.215.648
8	Immoweb	1.752.072	18	Een	1.184.904
9	RTL.be	1.702.932	19	Sporza	1.181.208
10	Le Soir	1.702.848	20	Zimmo	1.037.400



Key Radio figures

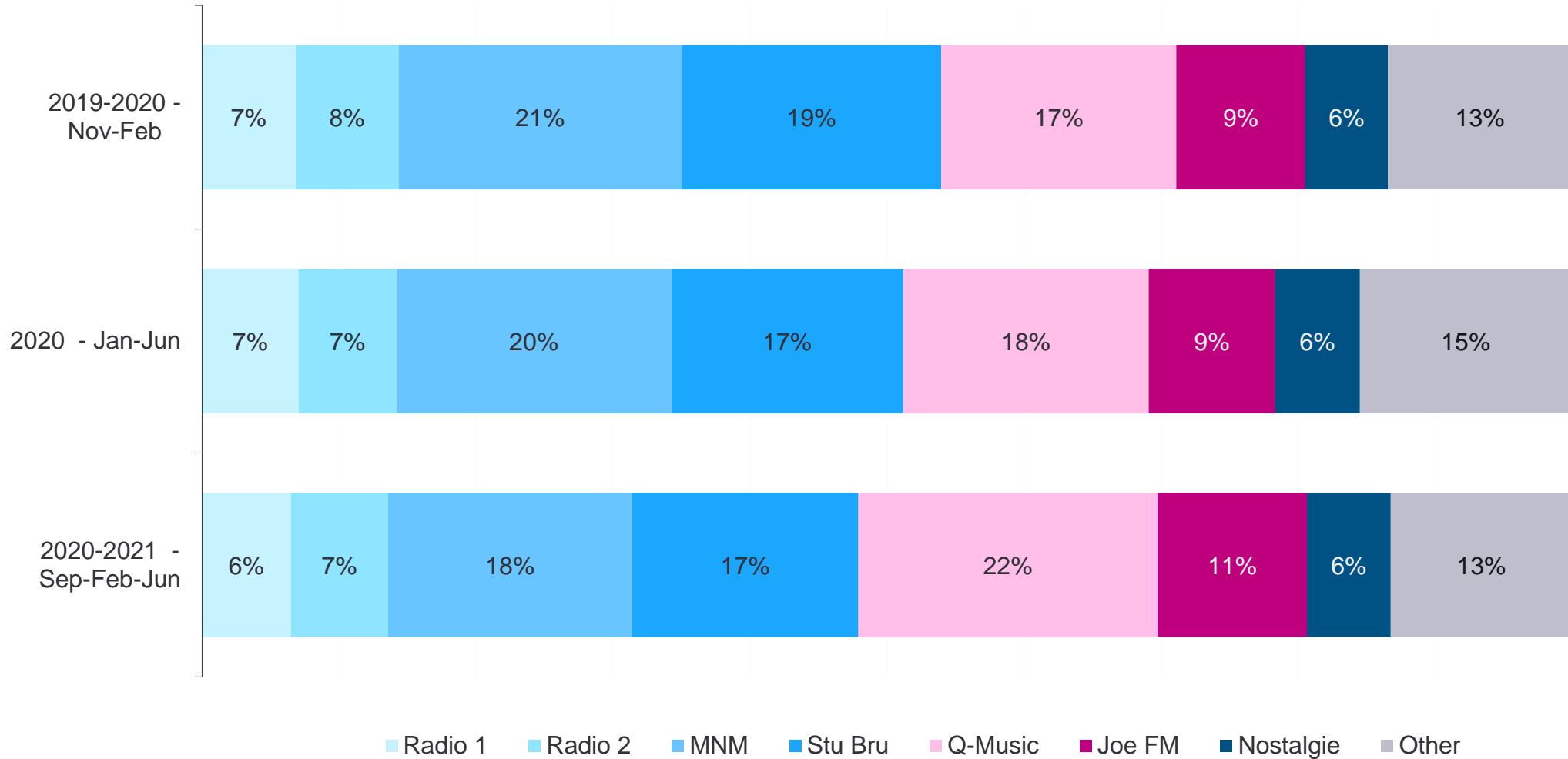
KEY RADIO FIGURES NORTH

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



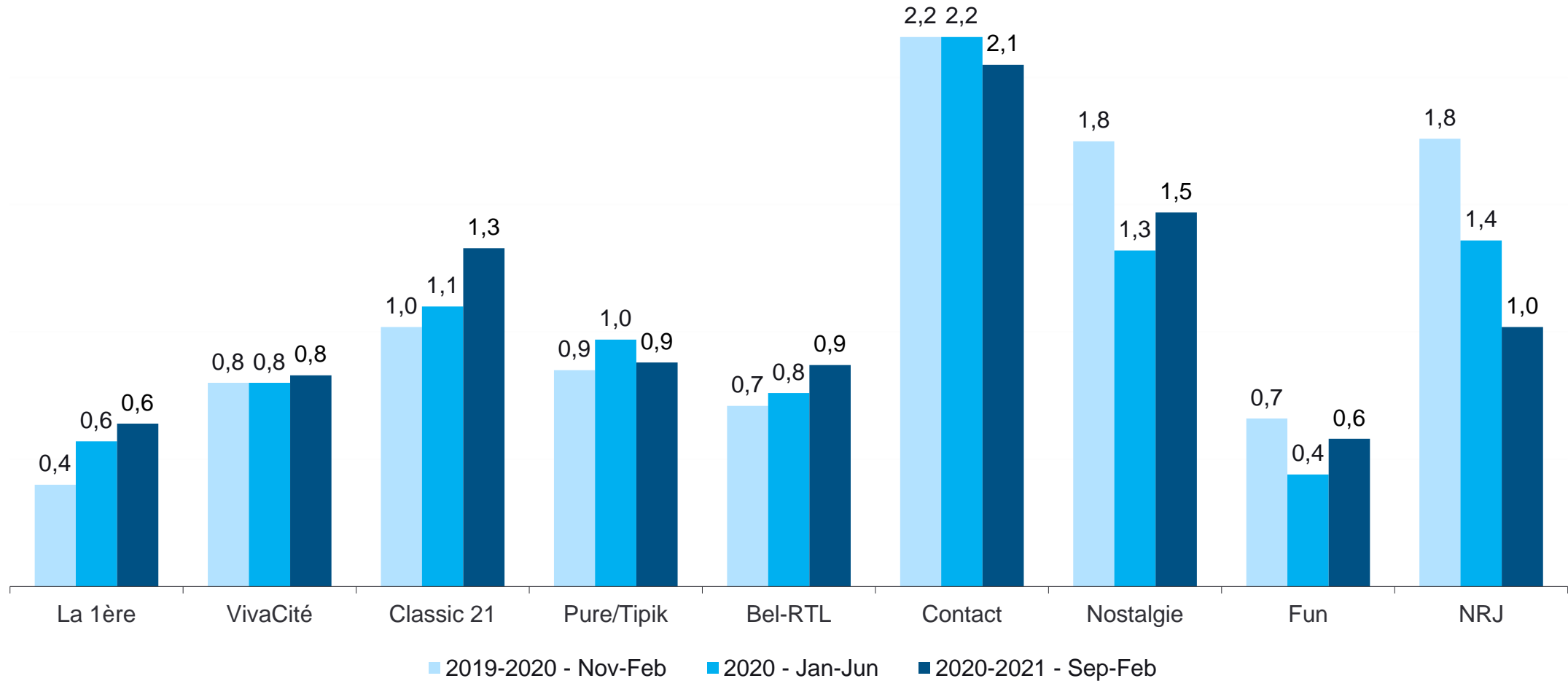
KEY RADIO FIGURES NORTH

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



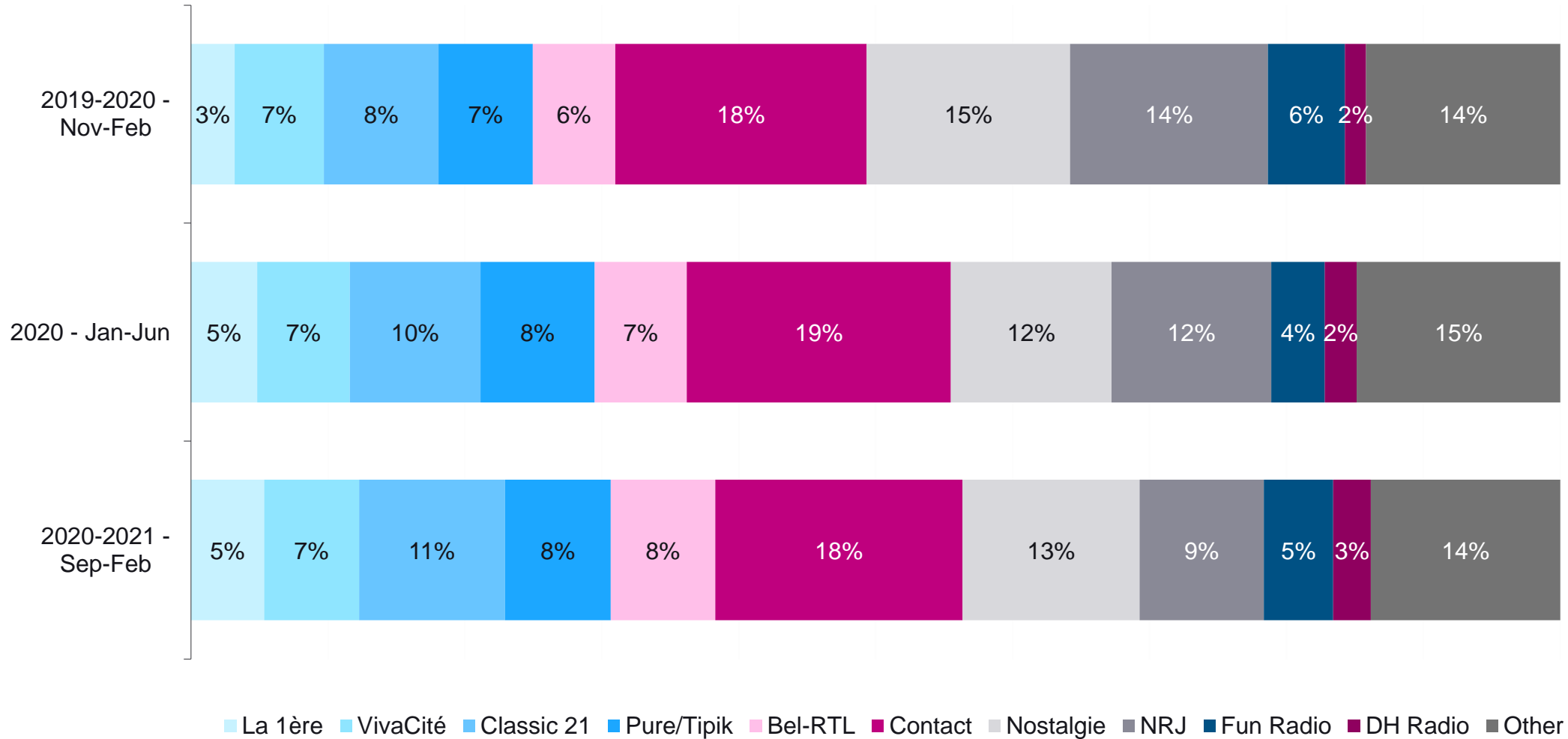
KEY RADIO FIGURES SOUTH

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

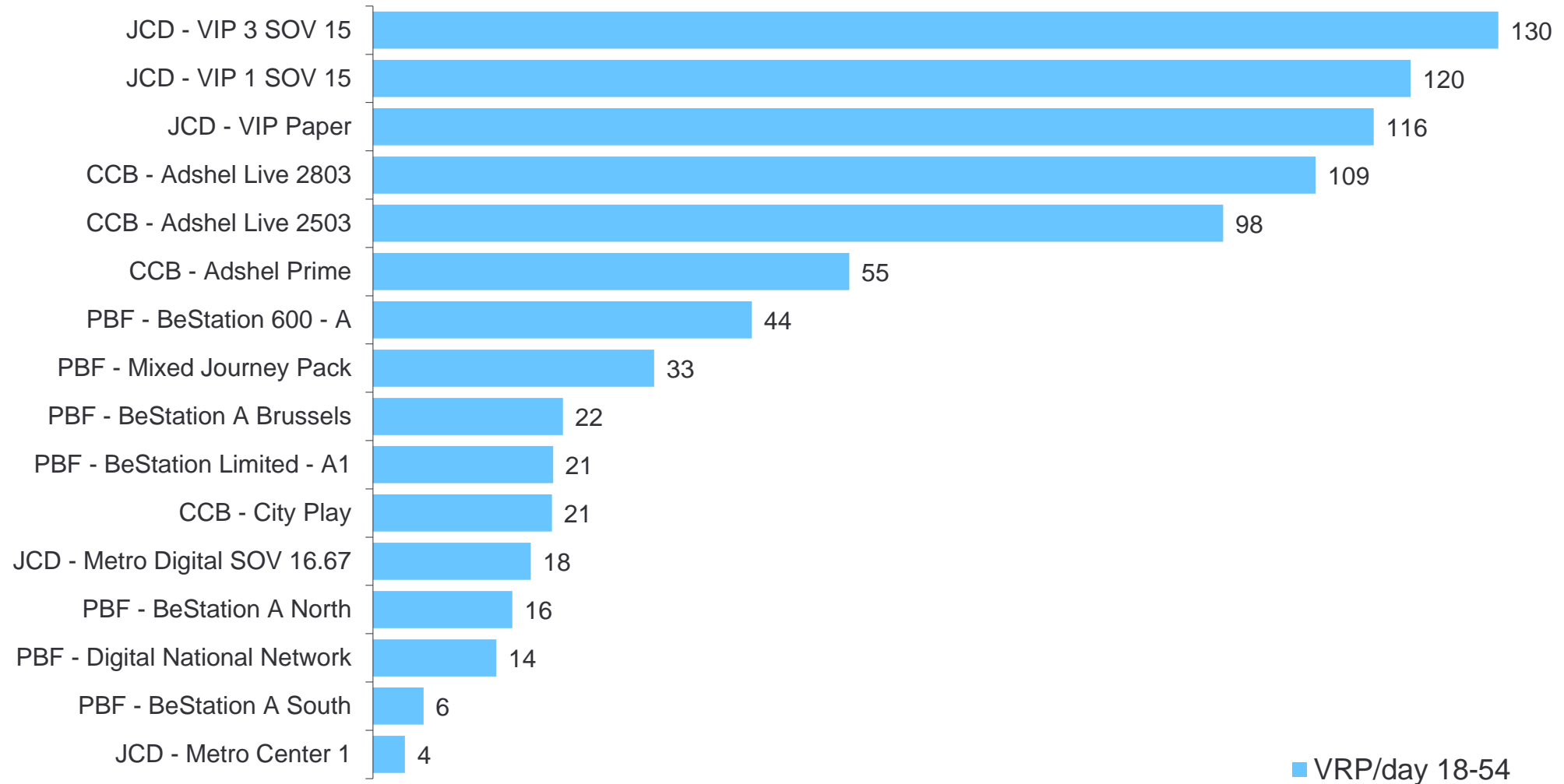
Key Print Figures - Magazines Circulation - Year 2020 (Paid + Free - digital sales included)

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

