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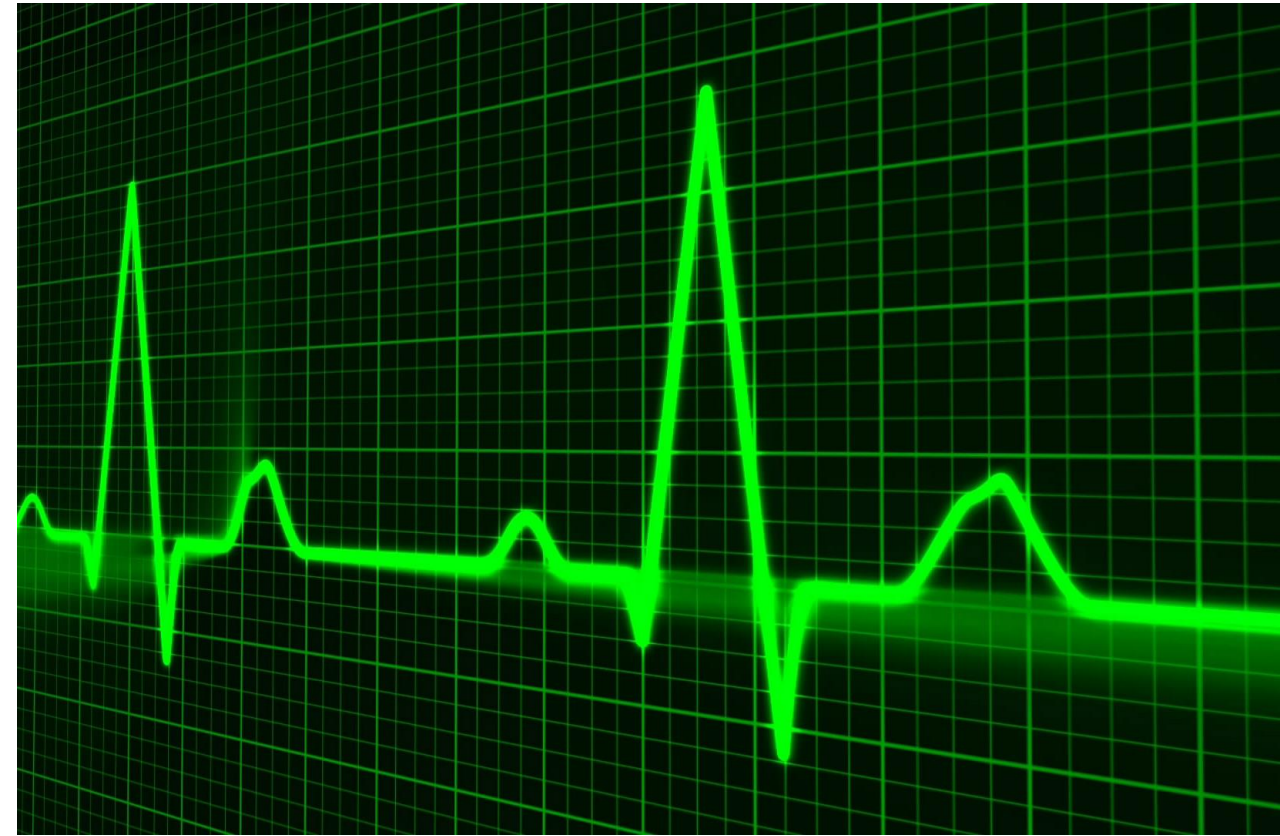
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

September 2020



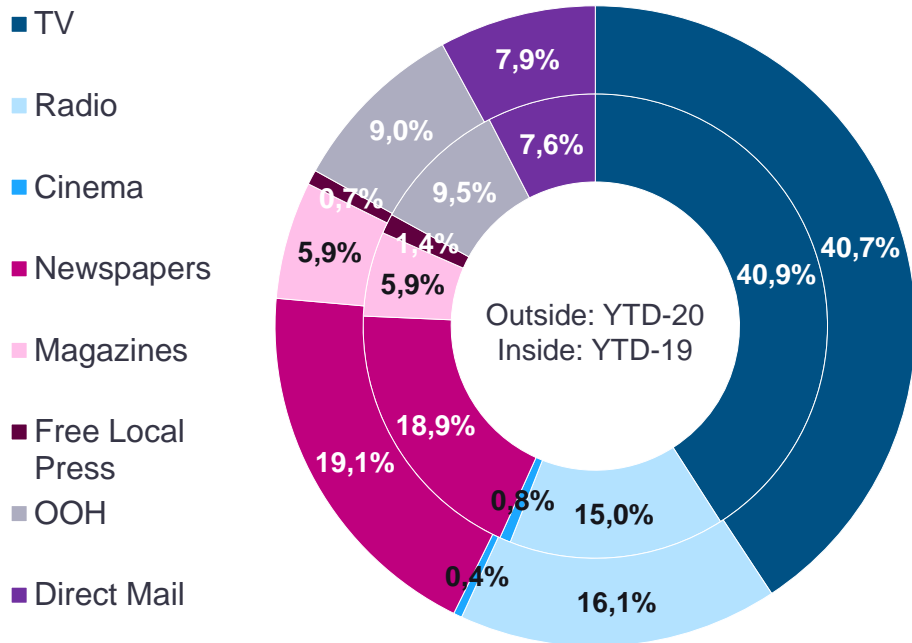
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Aug 2020

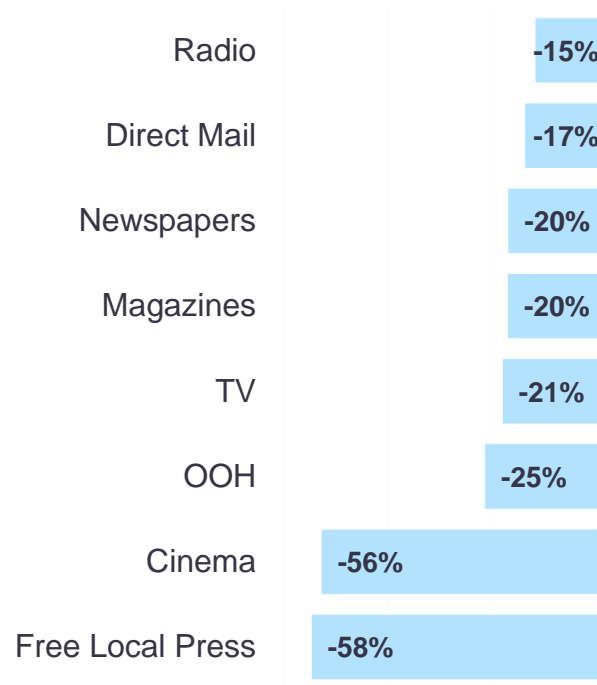
NB : No Internet figures in MDB for 2019 & 2020

Market	National	North	South
<ul style="list-style-type: none"> € Mo vs YTD-19 % Region 	1.834,5 - 20,9% 100%	1.115,2 - 20,9% 61%	719,3 - 21,0% 39%

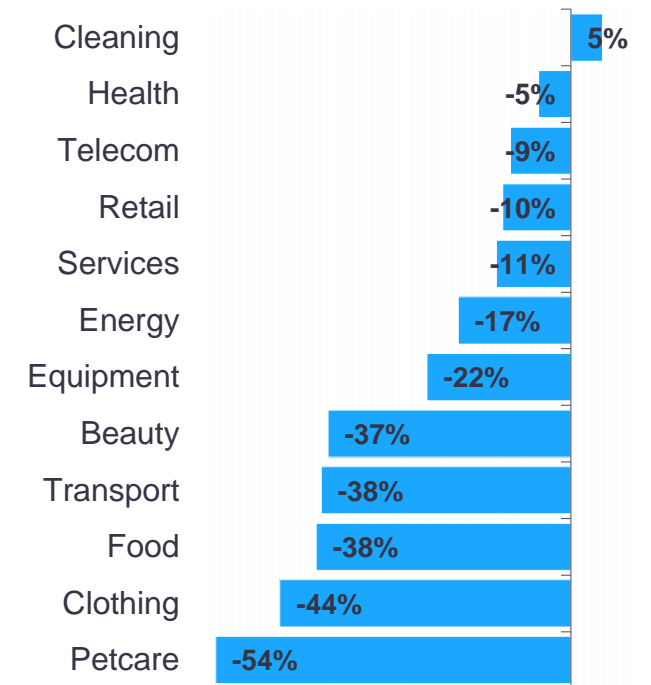
Media Mix Evol.



Media Evol. (vs YTD-19)



EcoGroups Evol. (vs YTD-19)



MDB TOP 30 ADVERTISERS - Jan-Aug 2020

NB : No Internet figures in MDB for 2019 & 2020

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
1	COLRUYT GROUP	78,8	↑ 126
2	PROCTER & GAMBLE	62,2	↓ 93
3	AHOLD DELHAIZE	34,7	↑ 122
4	RECKITT & BENCKISER	24,6	↓ 75
5	TELENET GROUP HOLDING	22,8	↑ 105
6	UNILEVER	22,7	↓ 65
7	D'IETEREN GROUP	22,6	↓ 54
8	PROXIMUS GROUP	21,7	↓ 70
9	THE COCA-COLA COMPANY	20,7	↓ 40
10	ALDI	20,2	↑ 144
11	ORANGE	20,2	↓ 97
12	PSA GROUPE	18,7	↓ 50
13	CARREFOUR GROUP	16,4	↓ 81
14	RENAULT-NISSAN ALLIANCE	15,6	↓ 72
15	LOTERIE NATIONALE	15,5	↑ 109

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
16	NETHYS	14,6	↑ 110
17	LIDL & CO	14,3	↑ 121
18	NESTLE GROUP	13,9	↑ 168
19	THE WALT DISNEY COMPANY	13,8	↓ 87
20	GROUPE 3 SUISES	13,3	↔ 101
21	PEPSICO	13,3	↑ 109
22	AS WATSON	13,1	↑ 107
23	VINTED	12,4	↓ 60
24	BMW GROUP BELGIUM	11,9	↑ 111
25	BEIERSDORF	11,4	↓ 89
26	HENKEL	10,7	↑ 157
27	FERRERO	10,7	↓ 45
28	L'OREAL GROUP	10,4	↓ 64
29	BNP-PARIBAS	9,8	↑ 109
30	MONDELEZ INTERNATIONAL	9,5	↓ 64



Key TV figures

Key TV figures North - Sep-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Sep-20	YTD	Sep-20	YTD	Sep-20	YTD
VTM	PRP 18-54	7,4	6,8	28,3	25,5	1.135	837
Q2	PRP 18-44	1,8	1,7	7,8	7,2	1.302	865
VITAYA	PRP 18-54	0,8	1,2	3,2	4,4	1.116	611
CAZ	MEN 18-54	0,6	0,6	2,5	2,5		
VIER	PRP 18-54	2,9	3,0	10,9	11,1	1.341	953
VIJF	PRP 18-54	1,2	1,5	4,7	5,6	1.187	787
ZES	PRP 18-54	0,4	0,6	1,6	2,3		
Total TV	PRP 18-54	26,2	26,6				
Total TV	PRP 18-44	23,1	23,0				
Total TV	MEN 18-54	22,2	22,1				

Key TV indexes North - Sep-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	
		Sep-20	YTD	Sep-20	YTD	Sep-20	YTD
VTM	PRP 18-54	↑ 107	↑ 112	↑ 110	↑ 108	✗ 107	✓ 98
Q2	PRP 18-44	↑ 132	↑ 106	↑ 127	↑ 102	✗ 131	✗ 108
VITAYA	PRP 18-54	↓ 69	↓ 86	↓ 70	↓ 83	✗ 127	✓ 86
CAZ	MEN 18-54	↑ 122	↑ 117	↑ 120	↑ 112		
VIER	PRP 18-54	↓ 74	↓ 95	↓ 75	↓ 92	✗ 117	✗ 102
VIJF	PRP 18-54	↓ 89	↔ 101	↓ 91	↓ 98	✗ 126	✗ 103
ZES	PRP 18-54	↓ 82	↑ 107	↓ 86	↑ 105		
Total TV	PRP 18-54	↓ 98	↑ 104				
Total TV	PRP 18-44	↑ 103	↑ 103				
Total TV	MEN 18-54	↔ 101	↑ 104				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Sep - 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	27,8%	27,5%	27,3%	29,9%	109
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	85,4%	82,9%	81,2%	79,0%	97
	VHS + DVD player + Blu-Ray	"	4,1%	3,6%	2,5%	2,4%	96
	Video on demand + Digital recorder	"	9,2%	11,9%	14,6%	17,2%	118
	Game console and other devices (3)	"	1,3%	1,6%	1,7%	1,4%	83
% Time shift viewing (4)	All Channels	"	23,4%	25,1%	29,0%	32,5%	112
	Main Channels (5)	"	26,2%	29,7%	32,9%	36,3%	110
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	87	86	85	85	
	Main channels (5) - TSV	"	30	34	35	36	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	106	101	94	96	102
	All TV channels (TSV)	"	28	29	31	36	117
	All TV channels (Live + TSV)	"	133	130	125	132	106
	Other TV Screen Usage	"	30	35	37	46	124
	Total TV Screen Usage	"	164	165	162	178	110

Key TV figures South - Sep-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Sep-20	YTD	Sep-20	YTD	Sep-20	YTD
RTL-TVI	PRP 18-54	5,7	6,7	25,5	26,7	1.112	702
Club-RTL	MEN 18-54	0,8	1,0	5,0	5,4	1.756	1.024
Plug-RTL	ALL 15-34	0,5	0,6	4,5	4,4	942	640
TF1	PRP 18-54	3,0	3,2	13,6	12,9	807	529
La Une	PRP 18-54	3,5	3,8	15,8	15,3	947	632
La Deux	PRP 18-54	1,3	1,4	5,8	5,4	833	584
AB3	PRP 18-44	1,3	1,6	7,6	7,4	740	672
TTV	PRP 18-54	22,2	25,1				
TTV	PRP 18-44	17,6	21,1				
TTV	ALL 15-34	11,8	14,1				
TTV	MEN 18-54	16,6	18,4				

Key TV indexes South - Sep-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	
		Sep-20	YTD	Sep-20	YTD	Sep-20	YTD
RTL-TV1	PRP 18-54	👉 99	👈 103	👈 108	👈 104	❌ 122	✅ 93
Club-RTL	MEN 18-54	👇 64	👇 75	👇 68	👇 79	❌ 190	❌ 126
Plug-RTL	ALL 15-34	👈 111	👈 111	👈 119	👈 113	❌ 119	✅ 89
TF1	PRP 18-54	👈 112	👈 112	👈 122	👈 113	❌ 106	✅ 84
La Une	PRP 18-54	👇 90	👈 108	👇 97	👈 109	❌ 130	❌ 104
La Deux	PRP 18-54	👇 87	👈 103	👇 94	👈 104	❌ 106	✅ 99
AB3	PRP 18-44	👇 82	👇 69	👇 90	👇 70	⚠️ 101	❌ 114
TTV	PRP 18-54	👇 92	👉 99				
TTV	PRP 18-44	👇 91	👉 99				
TTV	ALL 15-34	👇 93	👇 97				
TTV	MEN 18-54	👇 94	👇 95				

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Sep - 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	31,9%	30,9%	30,4%	32,8%	108
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	78,0%	75,1%	72,4%	67,0%	92
	VHS + DVD player + Blu-Ray	"	7,3%	6,6%	5,0%	4,0%	81
	Video on demand + Digital recorder	"	14,0%	17,6%	21,4%	27,8%	130
	Game console and other devices (3)	"	0,7%	0,7%	1,2%	1,2%	101
% Time shift viewing (4)	All Channels	"	18,1%	20,2%	21,5%	24,0%	112
	Main Channels (5)	"	19,7%	20,6%	21,9%	24,5%	112
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	83	87	88	
	Main channels (5) - TSV	"	53	51	50	51	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	137	125	121	115	95
	All TV channels (TSV)	"	26	25	27	29	110
	All TV channels (Live + TSV)	"	163	151	148	145	98
	Other TV Screen Usage	"	54	58	65	84	130
	Total TV Screen Usage	"	217	209	213	229	107



Top websites

Key Digital Figures - TOP BELGIAN WEBSITES - Sep-20

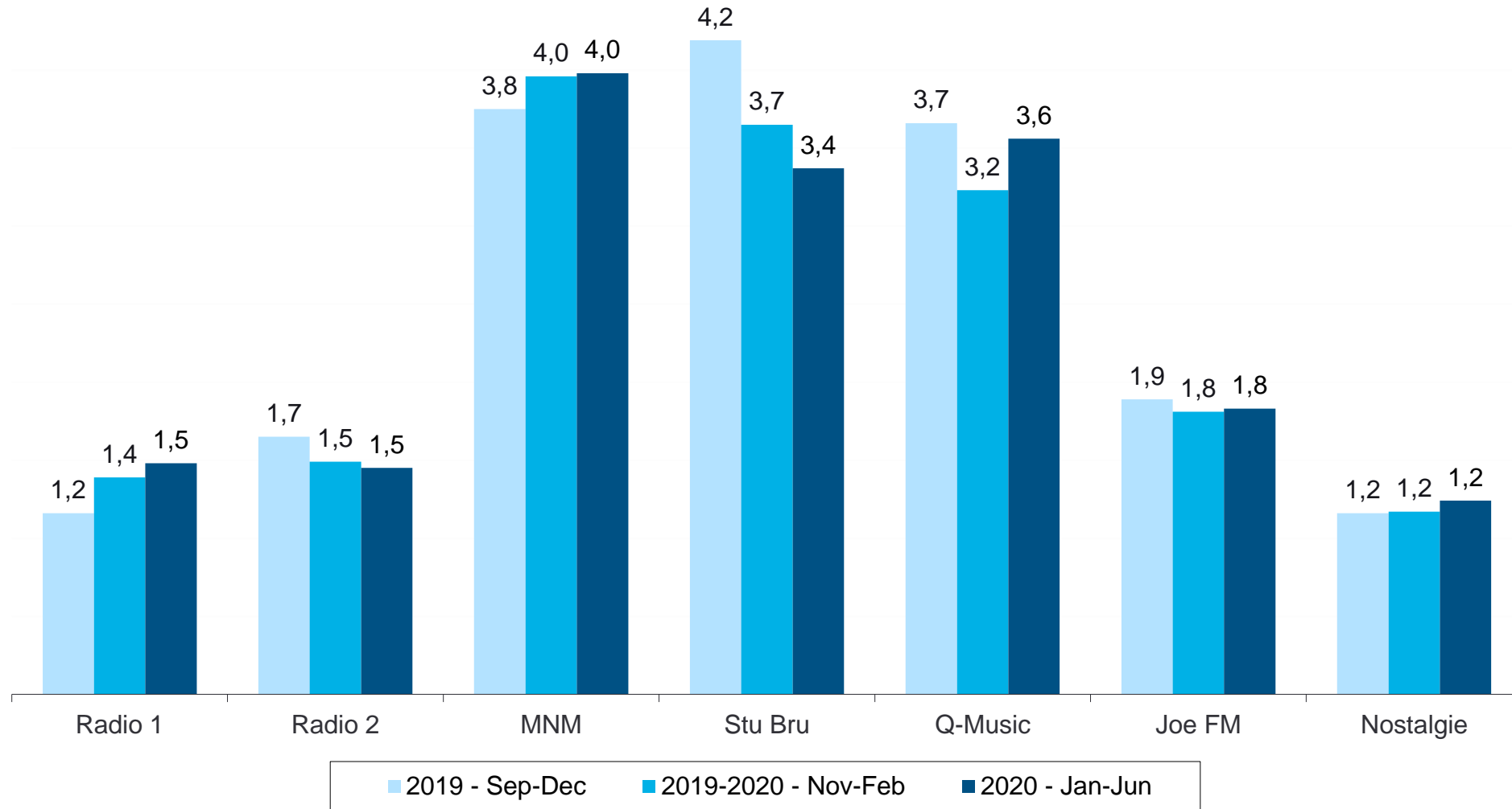
Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.305.736	11	Sudpresse Editions Digitales	1.563.408
2	Nieuwsblad	3.118.332	12	De Standaard	1.517.964
3	VRT	2.420.628	13	Knack/LeVif	1.487.388
4	RTBF.be	2.313.864	14	La Libre.be	1.344.924
5	Sudinfo	2.191.560	15	Gazet van Antwerpen	1.344.588
6	2dehands.be/2ememain.be	2.150.148	16	Flair	1.327.788
7	RTL.be	2.061.780	17	L'Avenir.net	1.270.332
8	DH.be	2.058.252	18	Sporza	1.255.128
9	Immoweb	1.915.704	19	7sur7.be	1.207.332
10	Le Soir	1.777.944	20	De Morgen	1.179.528



Key Radio figures

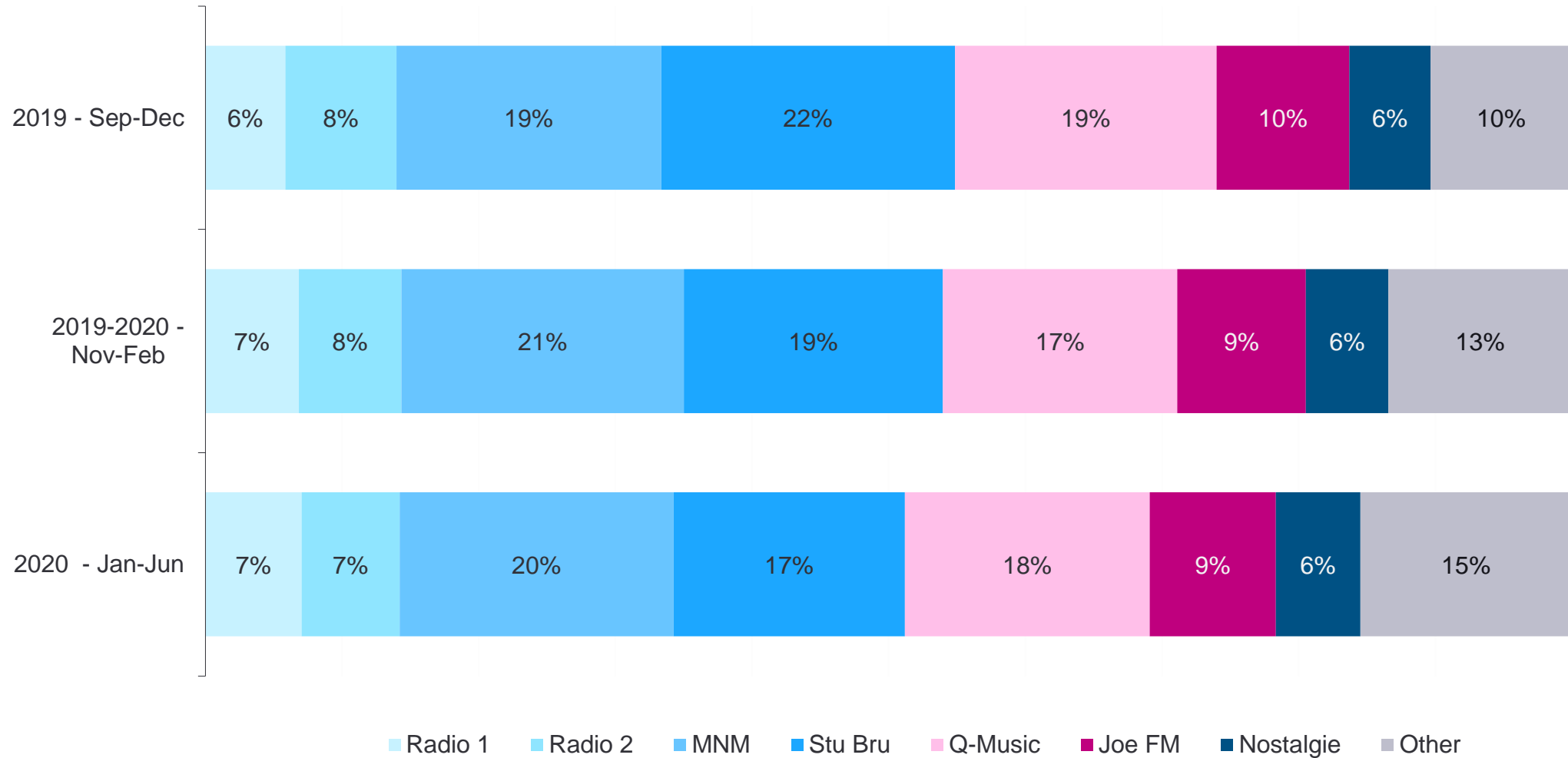
KEY RADIO FIGURES NORTH

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



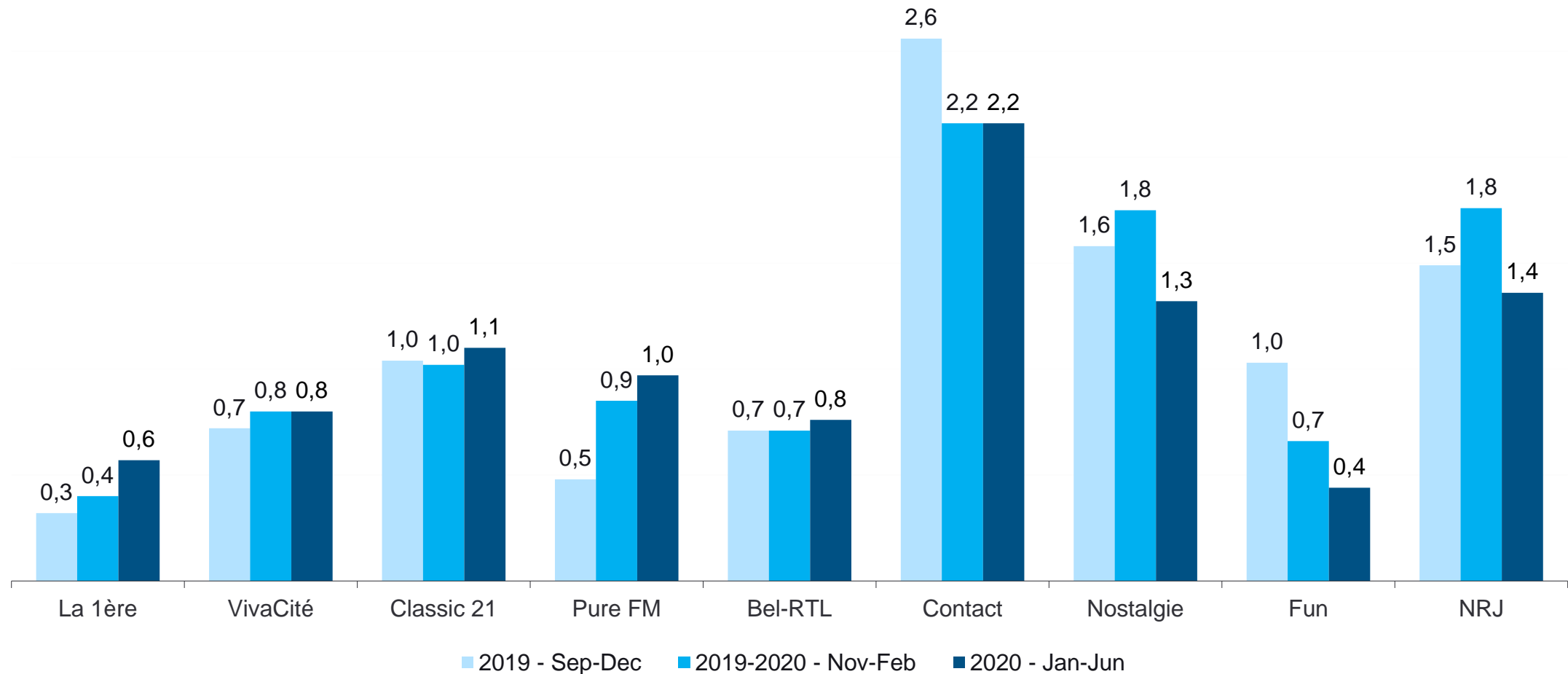
KEY RADIO FIGURES NORTH

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



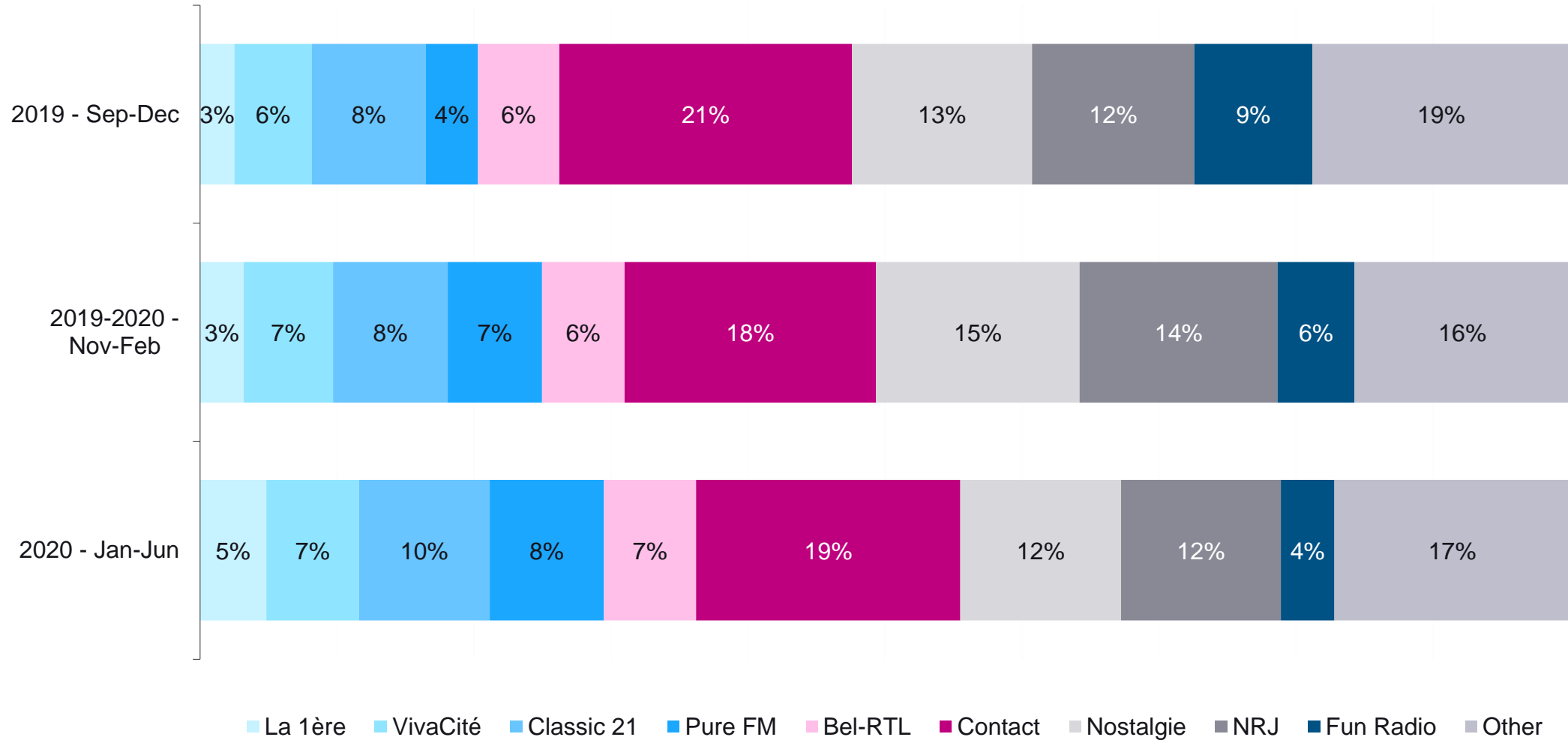
KEY RADIO FIGURES SOUTH

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

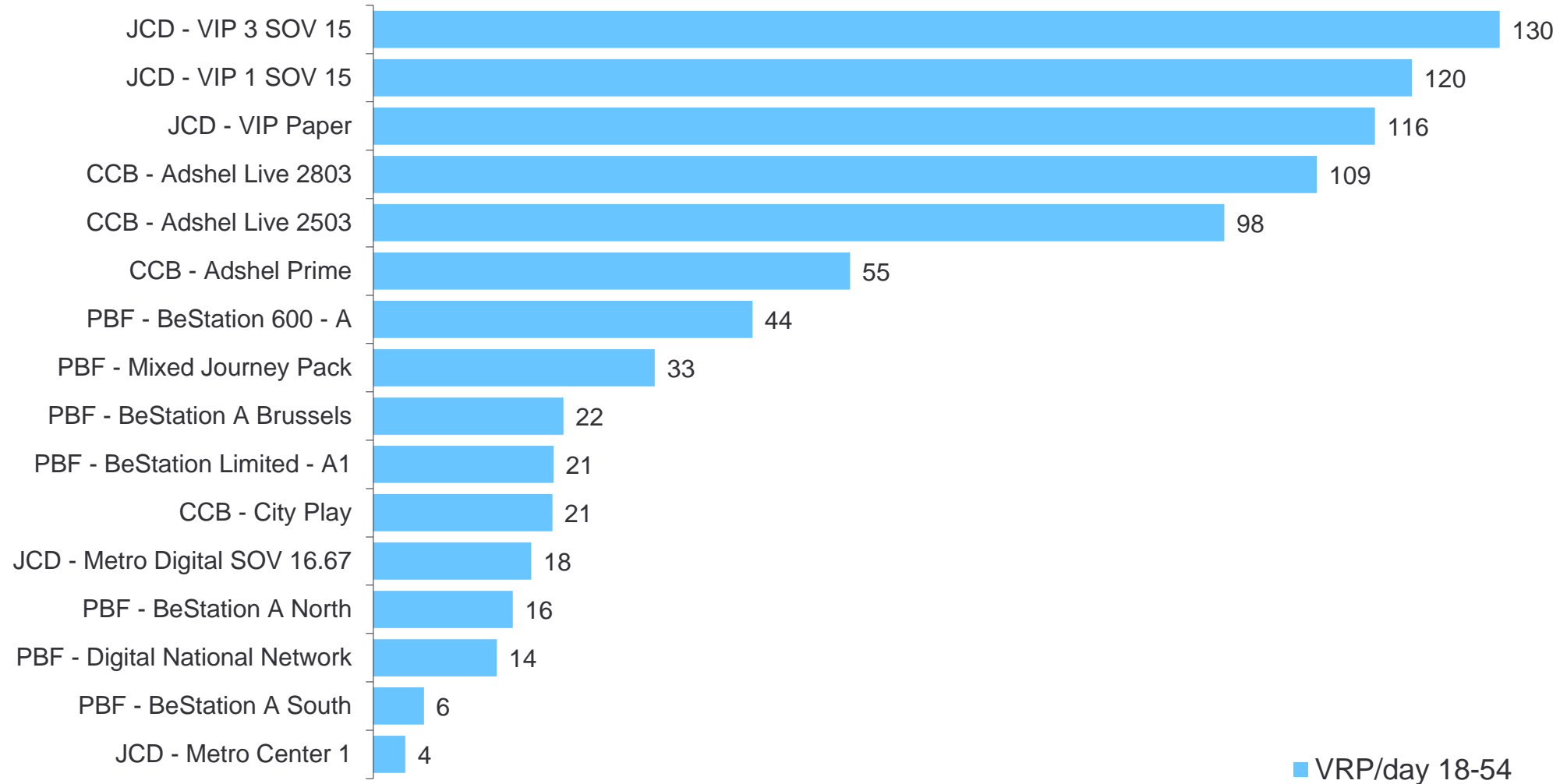
Key Print Figures - Magazines Circulation - Year 2019 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages		TOTAL	
	Circulation	vs 2018	Circulation	vs 2018	Circulation	vs 2018	Circulation	vs 2018
Television	596.383	↓ 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
TOTAL	1.107.829	↓ 96	715.854	↓ 94	230.330	↓ 88	2.054.013	↓ 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

