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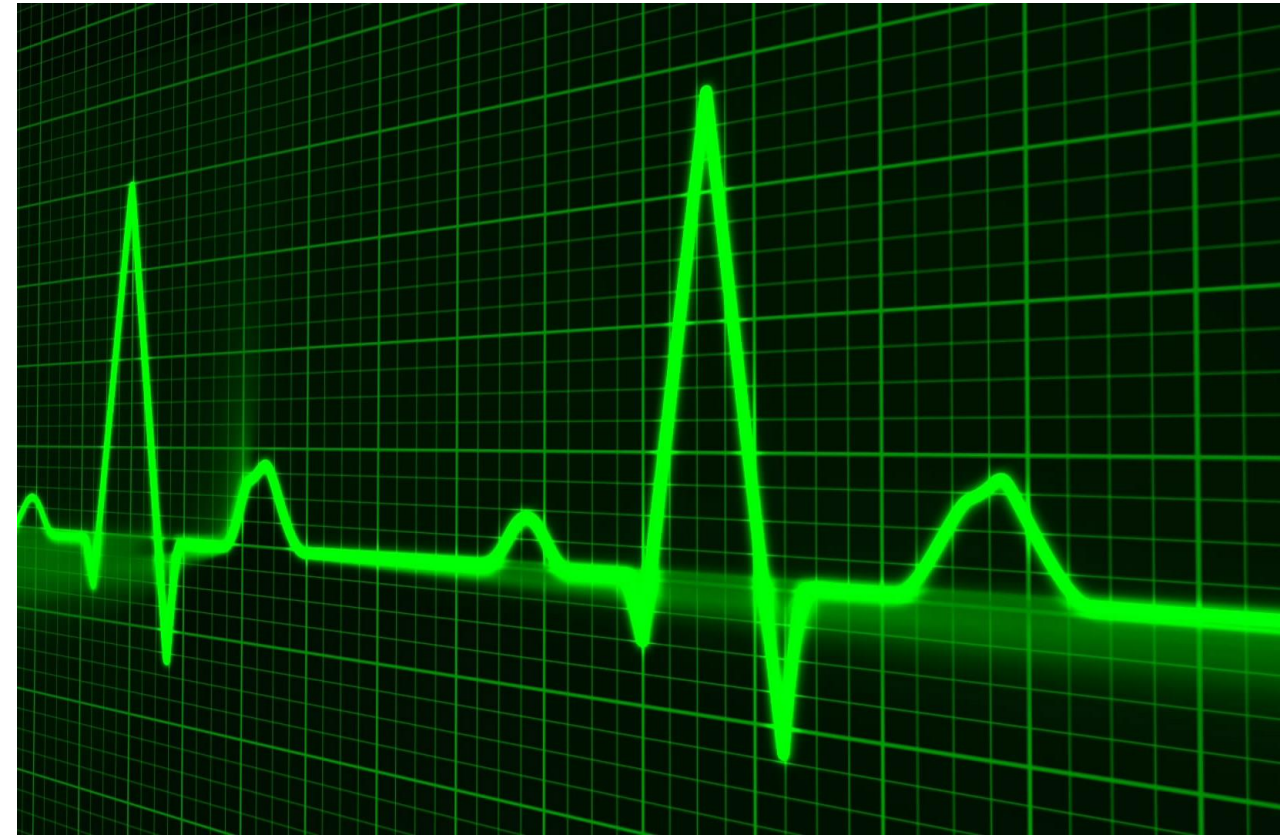
CONNECTIONS AGENCY



intelligence  
Market & Business

# MARKET PERFORMANCES BAROMETER

October 2020



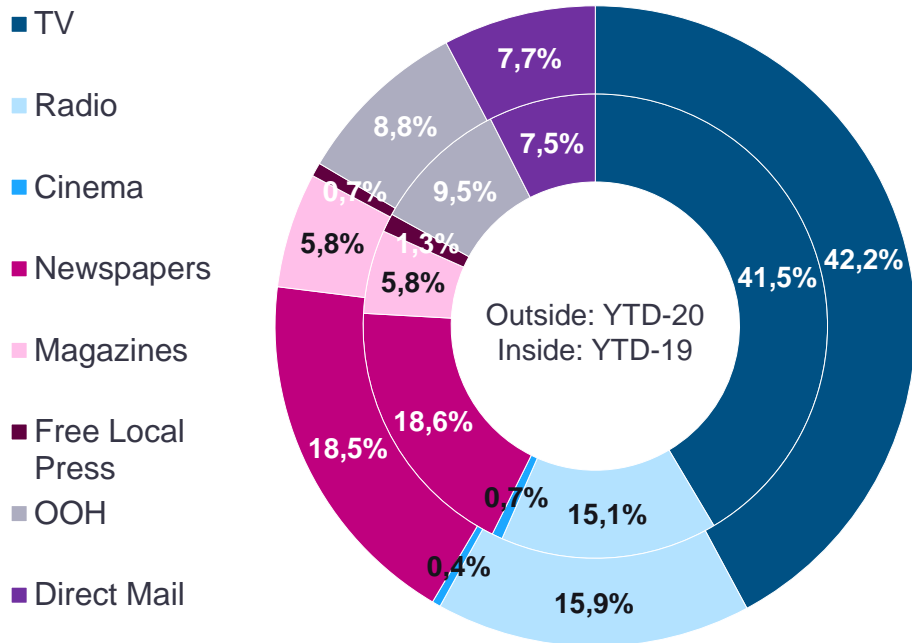
# Gross Media Investments Evolution

# GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Sep 2020

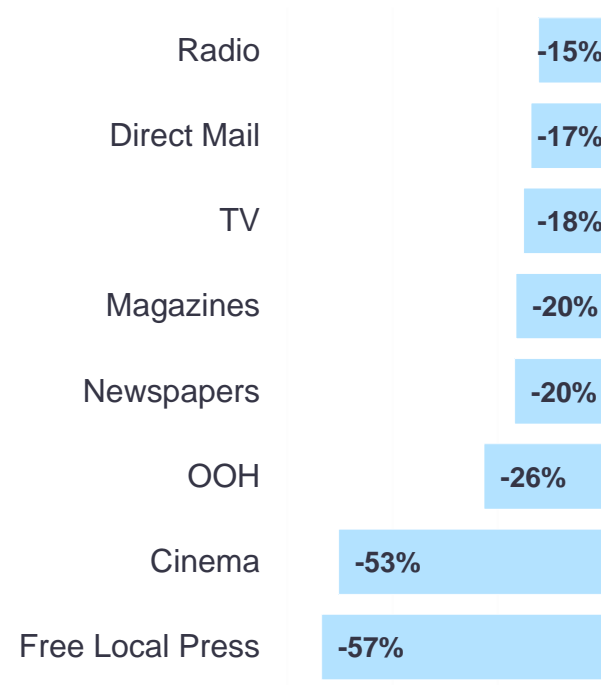
NB : No Internet figures in MDB for 2019 & 2020

Market	National	North	South
<ul style="list-style-type: none"> <li>■ € Mo</li> <li>■ vs YTD-19</li> <li>■ % Region</li> </ul>	2.180,8 - 19,4% 100%	1.320,2 - 19,8% 61%	860,6 - 18,8% 39%

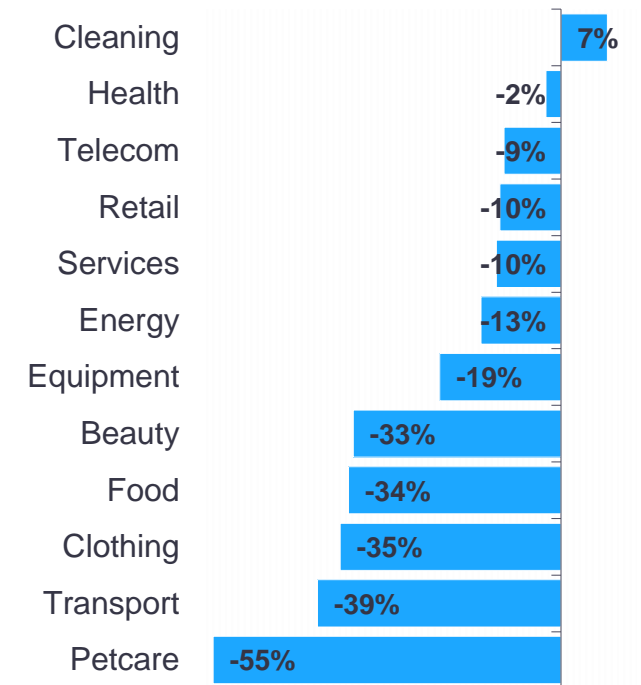
**Media Mix Evol.**



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



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



# MDB TOP 30 ADVERTISERS - Jan-Sep 2020

NB : No Internet figures in MDB for 2019 & 2020

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
1	COLRUYT GROUP	92,4	↑ 130
2	PROCTER & GAMBLE	75,8	↓ 94
3	AHOLD DELHAIZE	41,9	↑ 129
4	RECKITT & BENCKISER	31,2	↓ 83
5	UNILEVER	28,8	↓ 71
6	THE COCA-COLA COMPANY	27,2	↓ 45
7	TELENET GROUP HOLDING	27,1	↑ 111
8	PROXIMUS GROUP	25,4	↓ 72
9	D'IETEREN GROUP	25,1	↓ 49
10	ALDI	24,6	↑ 147
11	PSA GROUPE	23,3	↓ 53
12	ORANGE	22,7	↓ 89
13	CARREFOUR GROUP	20,0	↓ 78
14	RENAULT-NISSAN ALLIANCE	19,7	↓ 70
15	NETHYS	19,0	↑ 107

Rank	ADV.GROUP	Gross Inv.	vs YTD-19
16	LOTERIE NATIONALE	18,8	↑ 111
17	THE WALT DISNEY COMPANY	17,7	↓ 90
18	LIDL & CO	17,0	↑ 113
19	PEPSICO	16,8	↑ 117
20	FERRERO	15,7	↓ 55
21	AS WATSON	15,6	↑ 112
22	NESTLE GROUP	15,5	↑ 151
23	VINTED	14,9	↓ 62
24	GROUPE 3 SUISES	14,7	↔ 99
25	BEIERSDORF	14,5	↓ 96
26	L'OREAL GROUP	14,0	↓ 70
27	BMW GROUP BELGIUM	13,9	↑ 104
28	MONDELEZ INTERNATIONAL	12,8	↓ 73
29	HENKEL	12,4	↑ 166
30	BNP-PARIBAS	12,0	↔ 99





# Key TV figures

# Key TV figures North - Oct-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Oct-20	YTD	Oct-20	YTD	Oct-20	YTD
VTM	PRP 18-54	9,0	7,0	29,6	26,0	1.063	862
Q2	PRP 18-44	1,8	1,7	6,8	7,2	1.260	905
VITAYA	PRP 18-54	0,9	1,1	3,1	4,2	1.022	638
CAZ	MEN 18-54	0,6	0,6	2,2	2,5	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	4,3	3,1	14,1	11,4	1.193	985
VIJF	PRP 18-54	1,3	1,5	4,2	5,4	1.023	806
ZES	PRP 18-54	0,5	0,6	1,7	2,2	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	30,3	27,0				
Total TV	PRP 18-44	26,9	23,4				
Total TV	MEN 18-54	25,0	22,4				

# Key TV indexes North - Oct-20

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>C/GRP</u> vs Channel's Objective	
		Oct-20	YTD	Oct-20	YTD	Oct-20	YTD
VTM	PRP 18-54	↑ 124	↑ 114	↑ 117	↑ 109	✓ 100	✓ 98
Q2	PRP 18-44	↑ 120	↑ 107	↑ 107	↑ 103	✗ 127	✗ 111
VITAYA	PRP 18-54	↓ 78	↓ 85	↓ 73	↓ 82	✗ 117	✓ 88
CAZ	MEN 18-54	↑ 108	↑ 115	↑ 102	↑ 111	Package	Package
VIER	PRP 18-54	↓ 90	↓ 94	↓ 84	↓ 91	✗ 103	✗ 103
VIJF	PRP 18-54	↓ 88	→ 100	↓ 82	↓ 96	✗ 107	✗ 103
ZES	PRP 18-54	↓ 93	↑ 105	↓ 87	↑ 103	Package	Package
Total TV	PRP 18-54	↑ 107	↑ 104				
Total TV	PRP 18-44	↑ 111	↑ 104				
Total TV	MEN 18-54	↑ 106	↑ 104				

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

Period: Jan-Oct - 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	28,1%	27,7%	27,7%	<b>30,2%</b>	109
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	85,5%	83,0%	81,3%	<b>79,1%</b>	97
	VHS + DVD player + Blu-Ray	"	4,1%	3,5%	2,5%	<b>2,3%</b>	94
	Video on demand + Digital recorder	"	9,2%	11,9%	14,5%	<b>17,2%</b>	118
	Game console and other devices (3)	"	1,3%	1,6%	1,7%	<b>1,4%</b>	81
<b>% Time shift viewing (4)</b>	All Channels	"	23,6%	25,6%	29,2%	<b>32,6%</b>	112
	Main Channels (5)	"	26,6%	30,2%	33,3%	<b>36,6%</b>	110
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	87	86	85	<b>84</b>	
	Main channels (5) - TSV	"	30	33	33	<b>37</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	106	101	95	<b>97</b>	102
	All TV channels (TSV)	"	28	29	31	<b>37</b>	117
	All TV channels (Live + TSV)	"	134	130	126	<b>133</b>	106
	Other TV Screen Usage	"	31	35	37	<b>46</b>	124
	Total TV Screen Usage	"	165	166	163	<b>180</b>	110



## Key TV figures South - Oct-20

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Oct-20	YTD	Oct-20	YTD	Oct-20	YTD
RTL-TVI	PRP 18-54	7,8	6,8	29,0	26,9	956	730
Club-RTL	MEN 18-54	0,8	1,0	4,2	5,3	1.709	1.089
Plug-RTL	ALL 15-34	0,6	0,6	4,4	4,4	860	663
TF1	PRP 18-54	3,5	3,3	13,1	12,9	758	558
La Une	PRP 18-54	4,4	3,9	16,2	15,4	806	652
La Deux	PRP 18-54	1,3	1,4	4,7	5,3	953	621
AB3	PRP 18-44	1,5	1,5	6,8	7,3	796	684
TTV	PRP 18-54	26,9	25,3				
TTV	PRP 18-44	21,5	21,2				
TTV	ALL 15-34	14,4	14,1				
TTV	MEN 18-54	19,9	18,6				

# Key TV indexes South - Oct-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	
		Oct-20	YTD	Oct-20	YTD	Oct-20	YTD
RTL-TV1	PRP 18-54	↑ 123	↑ 105	↑ 119	↑ 105	✗ 103	✓ 95
Club-RTL	MEN 18-54	↓ 72	↓ 75	↓ 69	↓ 78	✗ 163	✗ 126
Plug-RTL	ALL 15-34	↑ 110	↑ 109	↑ 113	↑ 113	✓ 88	✓ 89
TF1	PRP 18-54	↑ 117	↑ 112	↑ 113	↑ 113	✓ 97	✓ 87
La Une	PRP 18-54	↑ 106	↑ 108	↑ 102	↑ 109	✓ 94	✓ 99
La Deux	PRP 18-54	↓ 88	↔ 101	↓ 84	↑ 102	✗ 124	✗ 102
AB3	PRP 18-44	↓ 62	↓ 68	↓ 64	↓ 69	✓ 100	✗ 108
TTV	PRP 18-54	↑ 104	↔ 99				
TTV	PRP 18-44	↓ 98	↔ 99				
TTV	ALL 15-34	↓ 98	↓ 98				
TTV	MEN 18-54	↑ 104	↓ 96				

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

Period: Jan-Oct - 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	32,2%	31,0%	30,7%	<b>33,0%</b>	107
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	78,1%	75,2%	71,9%	<b>67,2%</b>	93
	VHS + DVD player + Blu-Ray	"	7,1%	6,4%	4,9%	<b>4,0%</b>	82
	Video on demand + Digital recorder	"	14,1%	17,6%	21,9%	<b>27,6%</b>	126
	Game console and other devices (3)	"	0,7%	0,8%	1,3%	<b>1,2%</b>	93
<b>% Time shift viewing (4)</b>	All Channels	"	18,4%	20,2%	21,7%	<b>24,0%</b>	111
	Main Channels (5)	"	20,0%	20,8%	22,2%	<b>24,4%</b>	110
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	89	83	86	<b>88</b>	
	Main channels (5) - TSV	"	51	51	51	<b>50</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	138	125	121	<b>116</b>	96
	All TV channels (TSV)	"	26	26	27	<b>30</b>	110
	All TV channels (Live + TSV)	"	164	151	148	<b>145</b>	98
	Other TV Screen Usage	"	54	58	66	<b>84</b>	127
	Total TV Screen Usage	"	218	209	214	<b>229</b>	107



# Top websites

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

Rank	Website	Monthly Net Reach #	Rank	Website	Monthly Net Reach #
1	HLN.be	3.474.324	11	Immoweb	1.845.984
2	Nieuwsblad	3.099.348	12	De Standaard	1.712.424
3	VRT	2.773.596	13	De Morgen	1.640.772
4	RTBF.be	2.670.864	14	La Libre.be	1.616.916
5	Sudinfo	2.332.176	15	L'Avenir.net	1.584.744
6	DH.be	2.221.380	16	Sudpresse Editions Digitales	1.533.756
7	RTL.be	2.218.272	17	Een	1.340.136
8	Knack/Le Vif	2.061.192	18	Flair	1.298.640
9	Le Soir	2.021.544	19	Gazet van Antwerpen	1.284.192
10	2dehands.be/2ememain.be	1.978.368	20	Metrotime	1.218.084

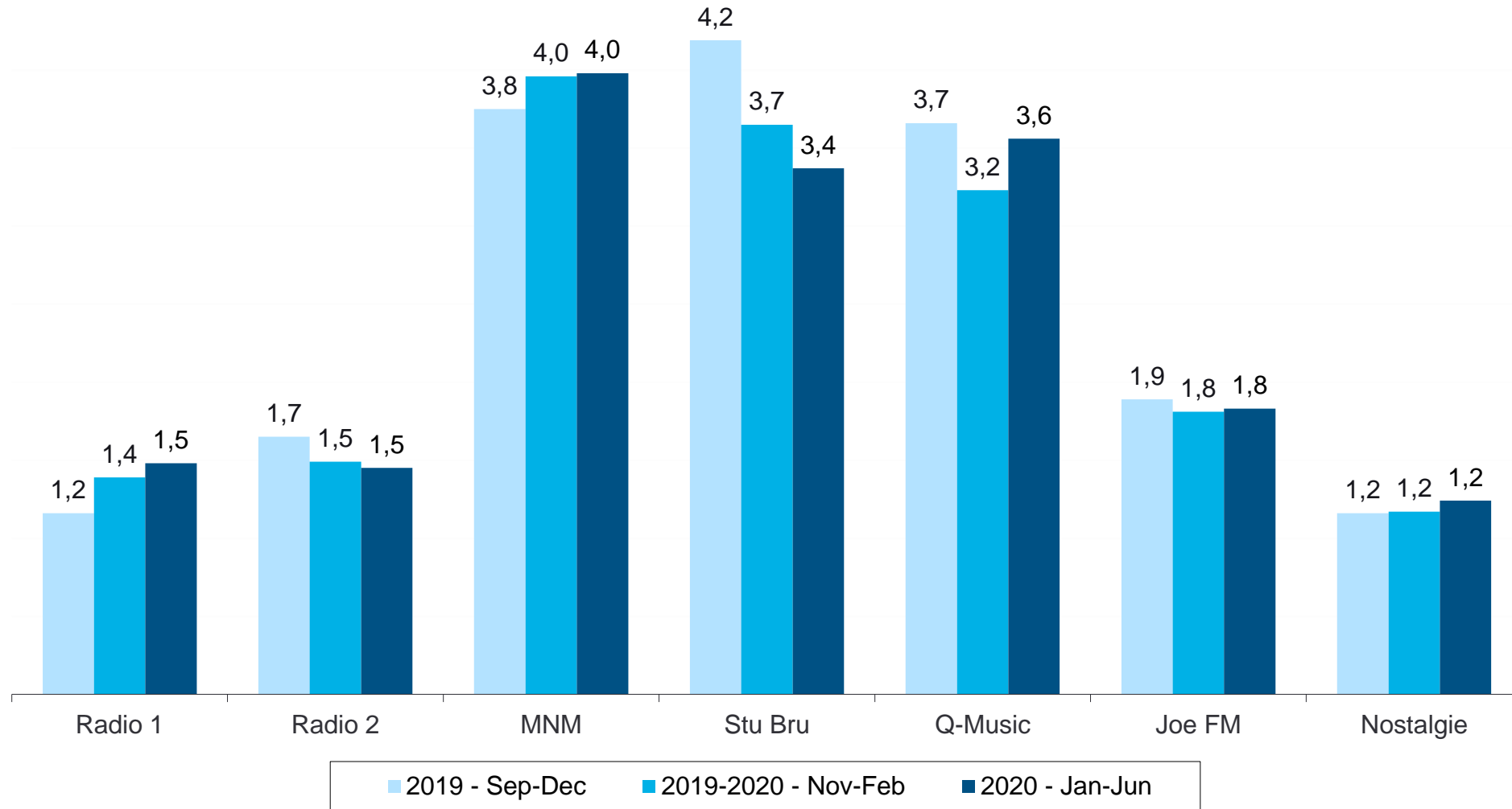




# Key Radio figures

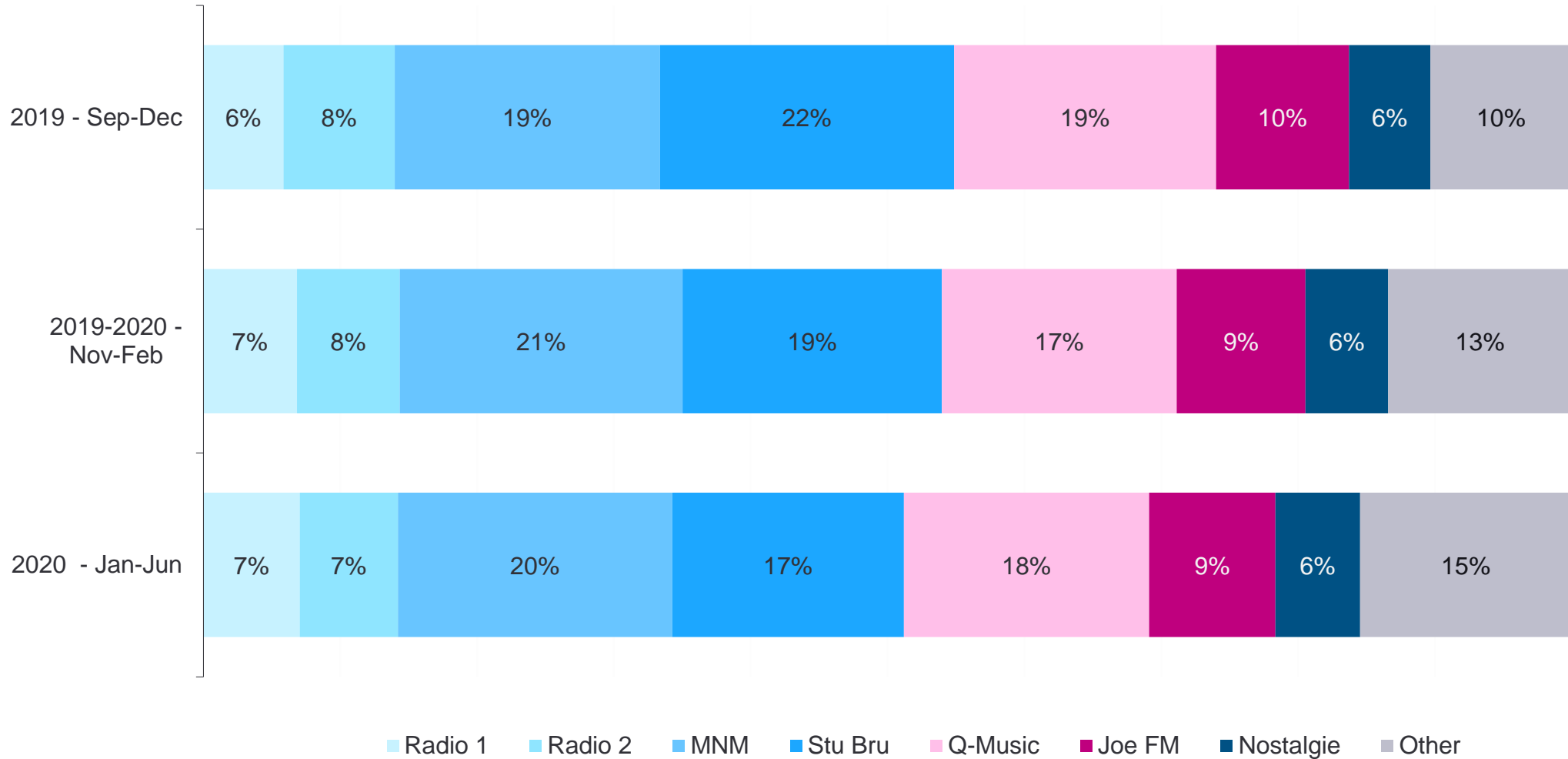
# KEY RADIO FIGURES NORTH

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



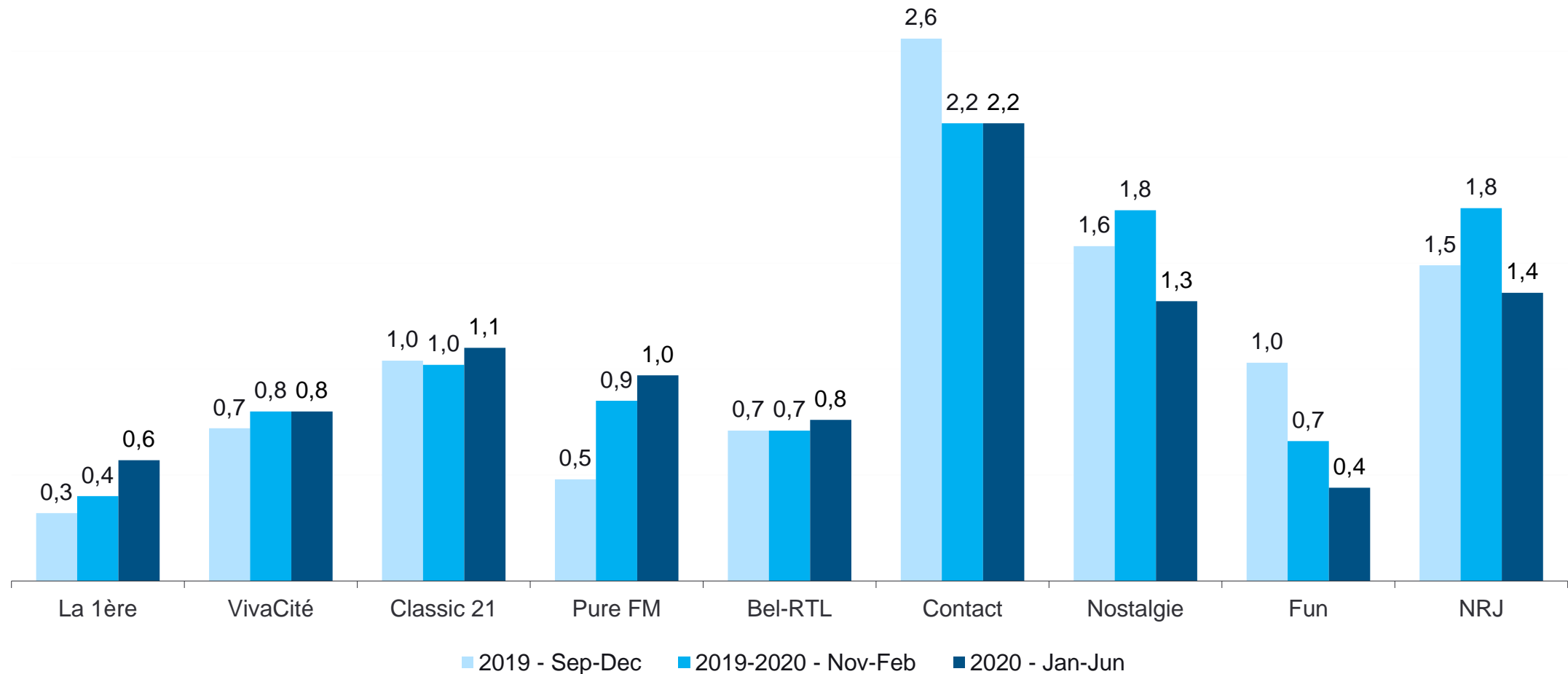
# KEY RADIO FIGURES NORTH

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



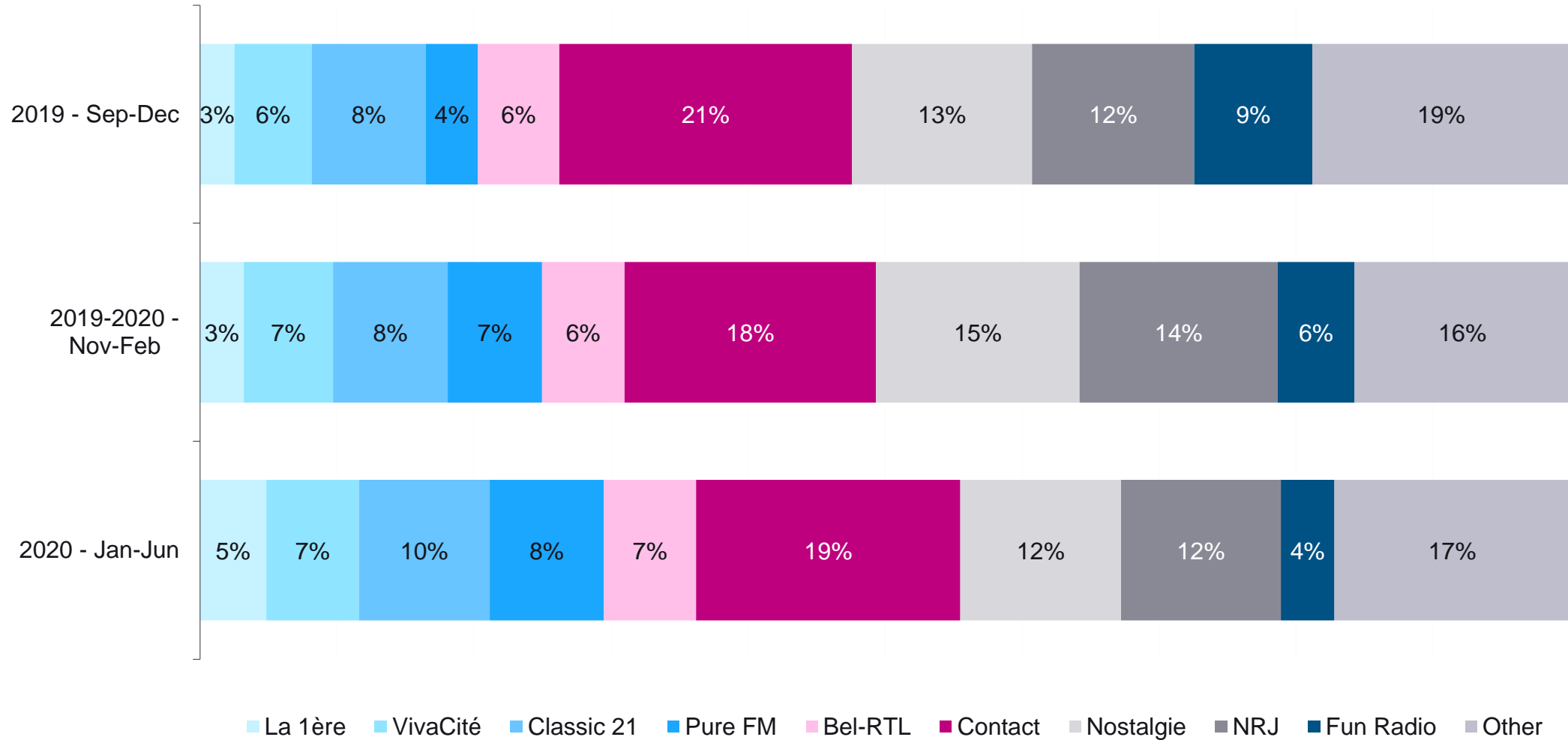
# KEY RADIO FIGURES SOUTH

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
<b>Total North</b>	<b>814.004</b>	<b>↓ 96</b>	<b>17%</b>	<b>↑ 120</b>

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
<b>Total South</b>	<b>308.704</b>	<b>→ 100</b>	<b>22%</b>	<b>↑ 142</b>

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

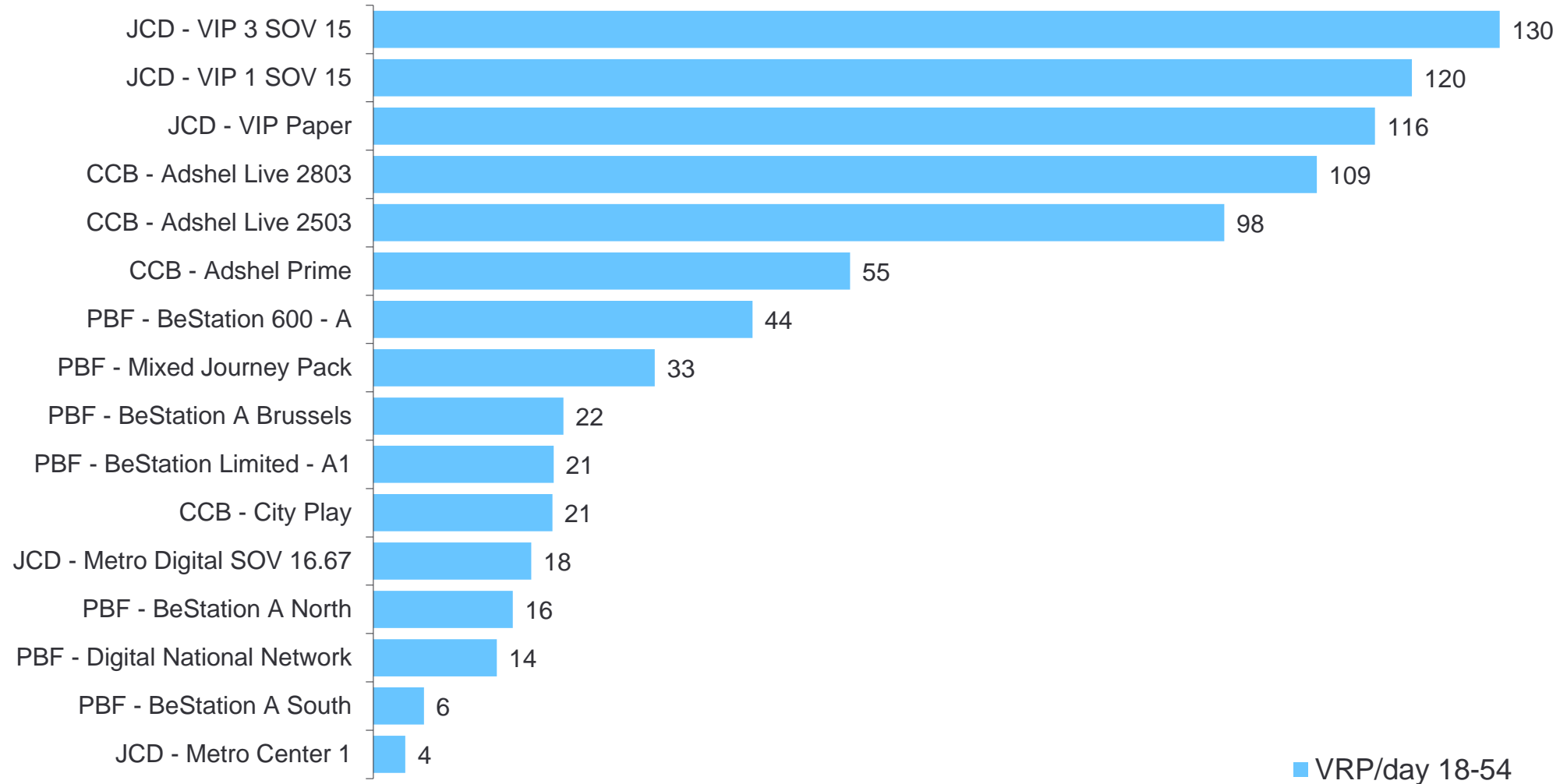
Categories	NL-speaking		FR-speaking		Both languages		TOTAL	
	Circulation	vs 2018	Circulation	vs 2018	Circulation	vs 2018	Circulation	vs 2018
Television	596.815	↓ 95	372.411	↓ 93			969.226	↓ 94
Women	334.431	↓ 96	152.069	↓ 90			486.500	↓ 94
Business & News	105.604	↑ 103	131.699	↓ 97	51.359	↓ 88	288.662	↓ 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
<b>TOTAL</b>	<b>1.113.304</b>	<b>↓ 96</b>	<b>712.263</b>	<b>↓ 93</b>	<b>230.215</b>	<b>↓ 88</b>	<b>2.055.782</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

