# Market Performances Barometer

## Status July 2015

space

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# GROSS MEDIA INVESTMENTS EVOLUTION

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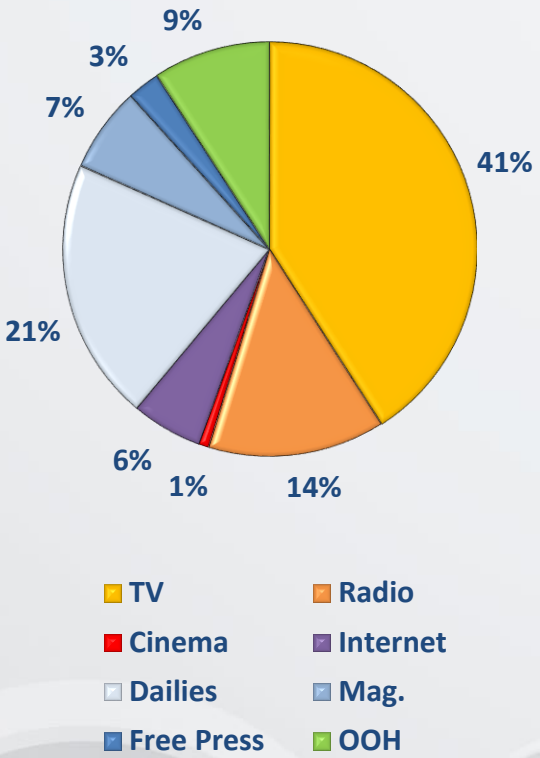
| Source: MDB | National | North | South |
|---|---|---|---|
| € Mo | 1,789.8 | 1,090.8 | 699.0 |
| % Region | 100% | 61% | 39% |
| vs YTD 2014 | - 2.2% | - 1.1% | - 3.9% |




## Media (vs YTD 2014)

TV (+ 6%)
OOH (+ 3%)

Radio (- 4%)
Magazines (- 6%)
Dailies (- 9%)
Cinema (- 11%)
Internet (- 14%)
Free Press (- 23%)

## Ecogroups (vs YTD 2014)

House Eq. (+ 12%)
Beauty (+ 10%)
House Cl. (+ 10%)
Food (+ 3%)
Transport (+ 2%)
Clothing (+ 0%)

Energy (- 1%)
Health (- 2%)
Retail (- 2%)
Services (- 12%)
Telecom (- 15%)
Petfood (- 25%)

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# KEY TV FIGURES

# Key TV Figures North - July 2015

## Source: CIM TV - Live +6 including guests

| CHANNEL | CHANNEL's MARKETING TARGET | RATING (%) 17:00-23:00 | | AUDIENCE SHARE (%) 17:00-23:00 | | C/GRP (€) Total Day | |
|---|---|---|---|---|---|---|---|
| | | Jul-15 | YTD | Jul-15 | YTD | Jul-15 | YTD |
| VTM | PRP 18-54 | 4.9 | 7.3 | 23.4 | 26.1 | 943 | 1,044 |
| 2BE | PRP 18-44 | 1.7 | 2.3 | 9.4 | 9.1 | 885 | 984 |
| VITAYA | PRP 18-54 | 0.9 | 1.1 | 4.1 | 3.8 | 966 | 1,027 |
| VIER | PRP 18-54 | 2.0 | 3.0 | 9.5 | 10.8 | 749 | 1,083 |
| VIJF | PRP 18-54 | 1.3 | 1.6 | 6.2 | 5.7 | 560 | 794 |
| Total TV | PRP 18-54 | 20.7 | 28.0 | | | | |
| Total TV | PRP 18-44 | 17.9 | 25.0 | | | | |

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# Key TV Indexes North - July 2015

## Source: CIM TV - Live +6 including guests

| CHANNEL | MARKETING TARGET | RATING 17:00-23:00 vs P-1 | | AUDIENCE SHARE 17:00-23:00 vs P-1 | | C/GRP vs Channel's Objective | |
|---|---|---|---|---|---|---|---|
| | | Jul-15 | YTD | Jul-15 | YTD | Jul-15 | YTD |
| VTM | PRP 18-54 | ↓ 88 | ↗ 101 | ↘ 99 | ↑ 105 | ✗ 124 | ✗ 106 |
| 2BE | PRP 18-44 | ↓ 98 | ↓ 98 | ↑ 113 | ↑ 102 | ✗ 125 | ✗ 107 |
| VITAYA | PRP 18-54 | ↓ 85 | ↓ 95 | ↓ 96 | ↓ 98 | ✗ 160 | ✗ 132 |
| VIER | PRP 18-54 | ↑ 107 | ↓ 98 | ↑ 120 | ↑ 102 | ✗ 103 | ✗ 108 |
| VIJF | PRP 18-54 | ↑ 128 | ↑ 123 | ↑ 145 | ↑ 128 | ✓ 96 | ✓ 99 |
| Total TV | PRP 18-54 | ↓ 89 | ↓ 97 | | | | |
| Total TV | PRP 18-44 | ↓ 87 | ↓ 96 | | | | |

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# Time Shift Viewing & Other TV Screen Usage - NORTH

## Period: Jan-Jul - Targetgroup: ALL 18-54

## Source: CIM TV - Live +6 (2011-2012 + Indexes) / Live +6 including guests (2013+)

| Variable | Channel | Daypart | YTD-12 | YTD-13 | YTD-14 | YTD-15 | 15 vs 14 |
|---|---|---|---|---|---|---|---|
| Rating (%) | TSU (Total Screen Usage) (1) | 17-23:00 | 26.1% | 27.6% | 28.7% | 28.3% | 98 |
| Audience share TSU (%) (2) | Total channels (Live + TSV) | " | 91.0% | 90.4% | 89.5% | 87.5% | 98 |
| | VHS + DVD player + Blue Ray | " | 2.4% | 2.2% | 2.8% | 3.8% | 137 |
| | Video on demand + Digital recorder | " | 5.1% | 6.1% | 6.4% | 7.8% | 121 |
| | Game console and other devices (3) | " | 1.5% | 1.3% | 1.3% | 0.9% | 71 |
| % Time shift viewing (4) | All Channels | " | 7.9% | 9.6% | 10.0% | 12.0% | 121 |
| | Main Channels (5) | " | 10.3% | 11.9% | 13.4% | 14.7% | 110 |
| Commercial breaks rating vs Full daypart rating | Main channels (5) - Live | " | 86 | 85 | 86 | 88 | |
| | Main channels (5) - TSV | " | 22 | 26 | 27 | 27 | |
| ATV (Average daily viewing time) in minutes | All TV channels (Live) | Total day | 126 | 132 | 134 | 127 | 95 |
| | All TV channels (TSV) | " | 9 | 11 | 12 | 14 | 116 |
| | All TV channels (Live + TSV) | " | 135 | 143 | 146 | 141 | 96 |
| | Other TV Screen Usage | " | 17 | 20 | 22 | 27 | 123 |
| | Total TV Screen Usage | " | 153 | 163 | 168 | 168 | 100 |

(1) : Total Screen Usage = Live + TSV + Guest viewing (since 2013) + Other Screen Usage

(2) : as % of total screen usage rating

(3) : camera, PC, etc…

(4) : as % of total channels viewing

(5) : Main channels = VTM + 2BE + Vitaya + VIER + VIJF

(6) : Rating index

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# Key TV Figures South - July 2015

## Source: CIM TV - Live +6 including guests

| CHANNEL | CHANNEL's MARKETING TARGET | RATING (%) 17:00-23:00 | | AUDIENCE SHARE (%) 17:00-23:00 | | C/GRP (€) Total Day | |
|---|---|---|---|---|---|---|---|
| | | Jul-15 | YTD | Jul-15 | YTD | Jul-15 | YTD |
| RTL-TVI | PRP 18-54 | 6.7 | 7.9 | 26.4 | 26.1 | 468 | 685 |
| Club-RTL | MEN 18-54 | 0.9 | 1.4 | 4.4 | 5.9 | 824 | 863 |
| Plug-RTL | ALL 15-34 | 1.2 | 1.1 | 7.8 | 6.3 | 426 | 611 |
| La Une | PRP 18-54 | 3.1 | 4.0 | 12.1 | 13.4 | 330 | 635 |
| La Deux | PRP 18-54 | 1.2 | 1.6 | 4.6 | 5.2 | 302 | 535 |
| AB3 | PRP 18-44 | 1.5 | 1.9 | 6.7 | 7.0 | 292 | 554 |
| TTV | PRP 18-54 | 25.3 | 30.1 | | | | |
| TTV | PRP 18-44 | 22.9 | 26.6 | | | | |
| TTV | ALL 15-34 | 14.7 | 17.9 | | | | |
| TTV | MEN 18-54 | 19.7 | 24.1 | | | | |

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# Key TV Indexes South - July 2015

## Source: CIM TV - Live +6 including guests

| CHANNEL | MARKETING TARGET | RATING 17:00-23:00 vs P-1 | | AUDIENCE SHARE 17:00-23:00 vs P-1 | | C/GRP vs Channel's Objective | |
|---|---|---|---|---|---|---|---|
| | | Jul-15 | YTD | Jul-15 | YTD | Jul-15 | YTD |
| RTL-TVI | PRP 18-54 | ↑ 103 | ↑ 106 | ↑ 106 | ↑ 103 | ✓ 100 | ✓ 99 |
| Club-RTL | MEN 18-54 | ↓ 68 | ↓ 84 | ↓ 77 | ↓ 85 | ✗ 157 | ✗ 112 |
| Plug-RTL | ALL 15-34 | ↑ 192 | ↑ 127 | ↑ 218 | ↑ 134 | ✓ 88 | ✓ 84 |
| La Une | PRP 18-54 | ↓ 78 | ↓ 96 | ↓ 80 | ↓ 94 | ✓ 99 | ✗ 102 |
| La Deux | PRP 18-54 | ↓ 54 | ↓ 74 | ↓ 55 | ↓ 72 | ✗ 103 | ✓ 99 |
| AB3 | PRP 18-44 | ↑ 113 | → 100 | ↑ 117 | ↘ 99 | ✓ 97 | ✓ 98 |
| TTV | PRP 18-54 | ↓ 97 | ↑ 103 | | | | |
| TTV | PRP 18-44 | ↓ 97 | ↗ 101 | | | | |
| TTV | ALL 15-34 | ↓ 88 | ↓ 95 | | | | |
| TTV | MEN 18-54 | ↓ 88 | ↘ 99 | | | | |

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# Time Shift Viewing & Other TV Screen Usage - SOUTH

## Period: Jan-Jul - Targetgroup: ALL 18-54

## Source: CIM TV - Live +6 (2011-2012 + Indexes) / Live +6 including guests (2013+)

| Variable | Channel | Daypart | YTD-12 | YTD-13 | YTD-14 | YTD-15 | 15 vs 14 |
|---|---|---|---|---|---|---|---|
| Rating (%) | TSU (Total Screen Usage) (1) | 17-23:00 | 30.3% | 31.5% | 32.2% | 32.4% | 101 |
| Audience share TSU (%) (2) | Total channels (Live + TSV) | " | 86.5% | 84.8% | 82.4% | 81.3% | 99 |
| | VHS + DVD player + Blue Ray | " | 2.8% | 3.7% | 5.2% | 7.6% | 148 |
| | Video on demand + Digital recorder | " | 9.0% | 9.1% | 10.0% | 9.9% | 99 |
| | Game console and other devices (3) | " | 1.8% | 2.5% | 2.5% | 1.2% | 48 |
| % Time shift viewing (4) | All Channels | " | 5.5% | 7.0% | 8.2% | 8.1% | 99 |
| | Main Channels (5) | " | 5.7% | 7.3% | 9.0% | 8.6% | 96 |
| Commercial breaks rating vs Full daypart rating | Main channels (5) - Live | " | 90 | 90 | 87 | 90 | |
| | Main channels (5) - TSV | " | 35 | 40 | 43 | 42 | |
| ATV (Average daily viewing time) in minutes | All TV channels (Live) | Total day | 161 | 164 | 160 | 161 | 100 |
| | All TV channels (TSV) | " | 8 | 10 | 12 | 12 | 100 |
| | All TV channels (Live + TSV) | " | 168 | 173 | 172 | 173 | 100 |
| | Other TV Screen Usage | " | 33 | 39 | 45 | 48 | 105 |
| | Total TV Screen Usage | " | 202 | 212 | 217 | 221 | 101 |

(1) : Total Screen Usage = Live + TSV + Guest viewing (since 2013) + Other Screen Usage

(2) : as % of total screen usage rating

(3) : camera, PC, etc…

(4) : as % of total channels viewing

(5) : Main channels = La Une + La Deux + AB3 + RTL-TVI + Club-RTL + Plug-RTL

(6) : Rating index

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# TOP WEBSITES

# Key Digital Figures - TOP WEBSITES

## Source: CIM internet / Comscore

**Warning:**

**Two studies, two methodologies.**
**CIM internet is a site-centric study measuring only Belgian sites.**
**Comscore is an international panel-based study.**
**Not to be compared !**

**CIM Unique Browser Definition:**
Browser identified by a unique CIM cookie* appearing on the measured site.

* : A cookie is a small text file stored by a website on your computer to keep track of information about your browsing on that site



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# Key Digital Figures - TOP BELGIAN WEBSITES - Jul-15

## Source: CIM internet - NB: Unique browsers on an average day

| Rank | Website | Daily Unique Browsers |
|---|---|---|
| 1 | HLN.be | 1,034,455 |
| 2 | Nieuwsblad | 844,529 |
| 3 | 2dehands.be-2ememain.be | 376,743 |
| 4 | De Standaard | 288,421 |
| 5 | Sporza | 243,615 |
| 6 | Kapaza | 230,296 |
| 7 | Knack-Le Vif | 217,493 |
| 8 | Gazet van Antwerpen | 202,827 |
| 9 | RTL.be | 202,460 |
| 10 | Deredactie.be | 200,751 |
| 11 | RTBF.be | 198,264 |
| 12 | Het Belang van Limburg | 193,630 |
| 13 | DH.be | 189,235 |
| 14 | Sudinfo | 188,726 |
| 15 | Yellow Pages | 163,183 |
| 16 | Immoweb | 162,817 |
| 17 | De Morgen | 161,794 |
| 18 | Le Soir | 148,551 |
| 19 | L'avenir.net | 147,539 |
| 20 | 7sur7.be | 130,666 |

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# Key Digital Figures - TOP Non-CIM WEBSITES - Jul-15

## Source: COMSCORE

| Website | Daily Visitors (000) |
|---|---|
| LIVE.COM | 2,198 |
| GOOGLE.BE | 1,236 |
| FACEBOOK.COM | 859 |
| MSN.BE | 849 |
| MSN.COM | 778 |
| GOOGLE.COM | 525 |
| YOUTUBE.COM | 347 |
| LINKEDIN.COM | 189 |
| IMGUR.COM | 170 |
| YAHOO.COM | 153 |

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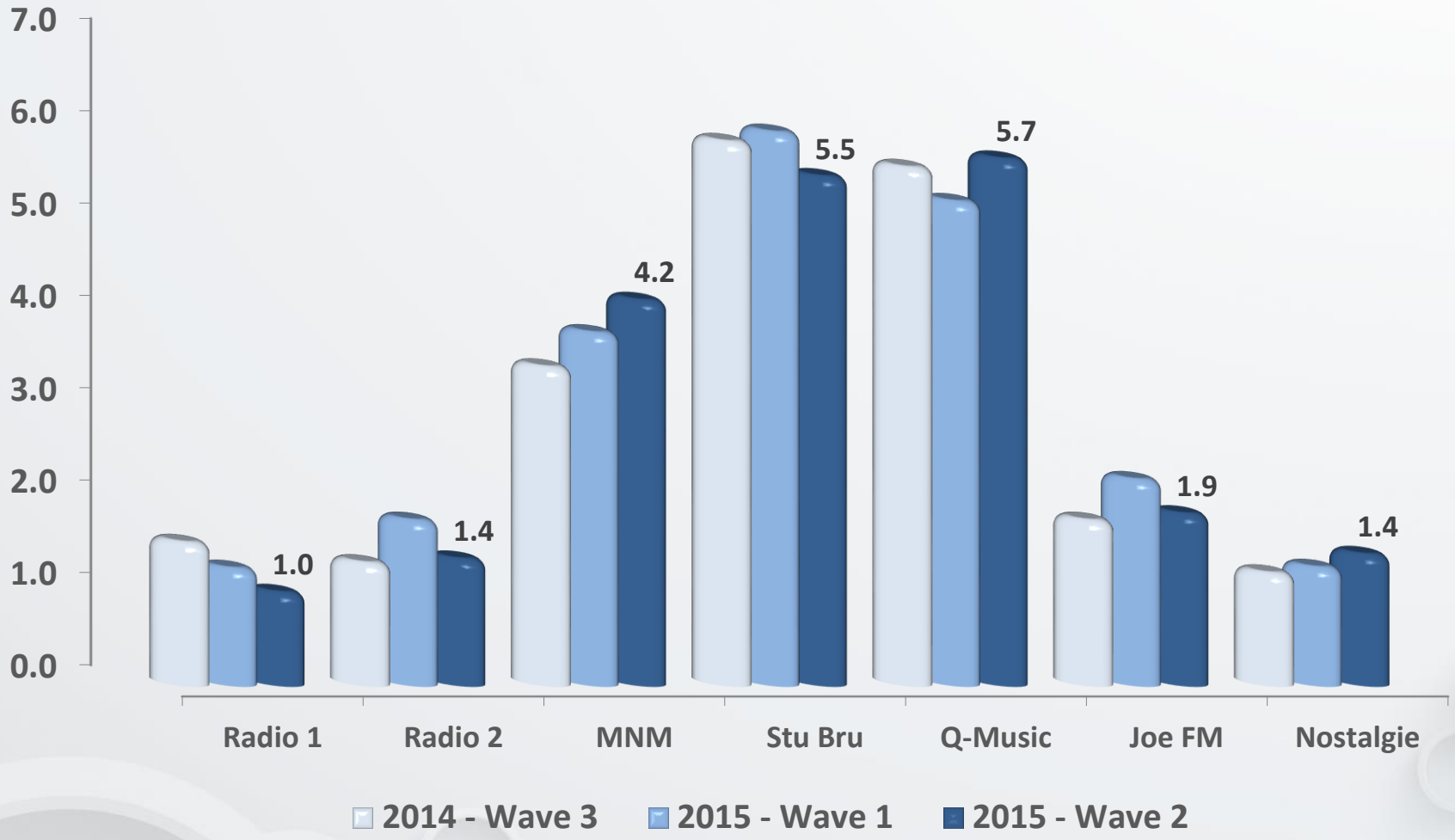
# KEY RADIO FIGURES

# Key Radio Figures North - Average Rating (%) on ALL 18-44

## Source: CIM Radio (07:00-19:00/Average Break Rating)

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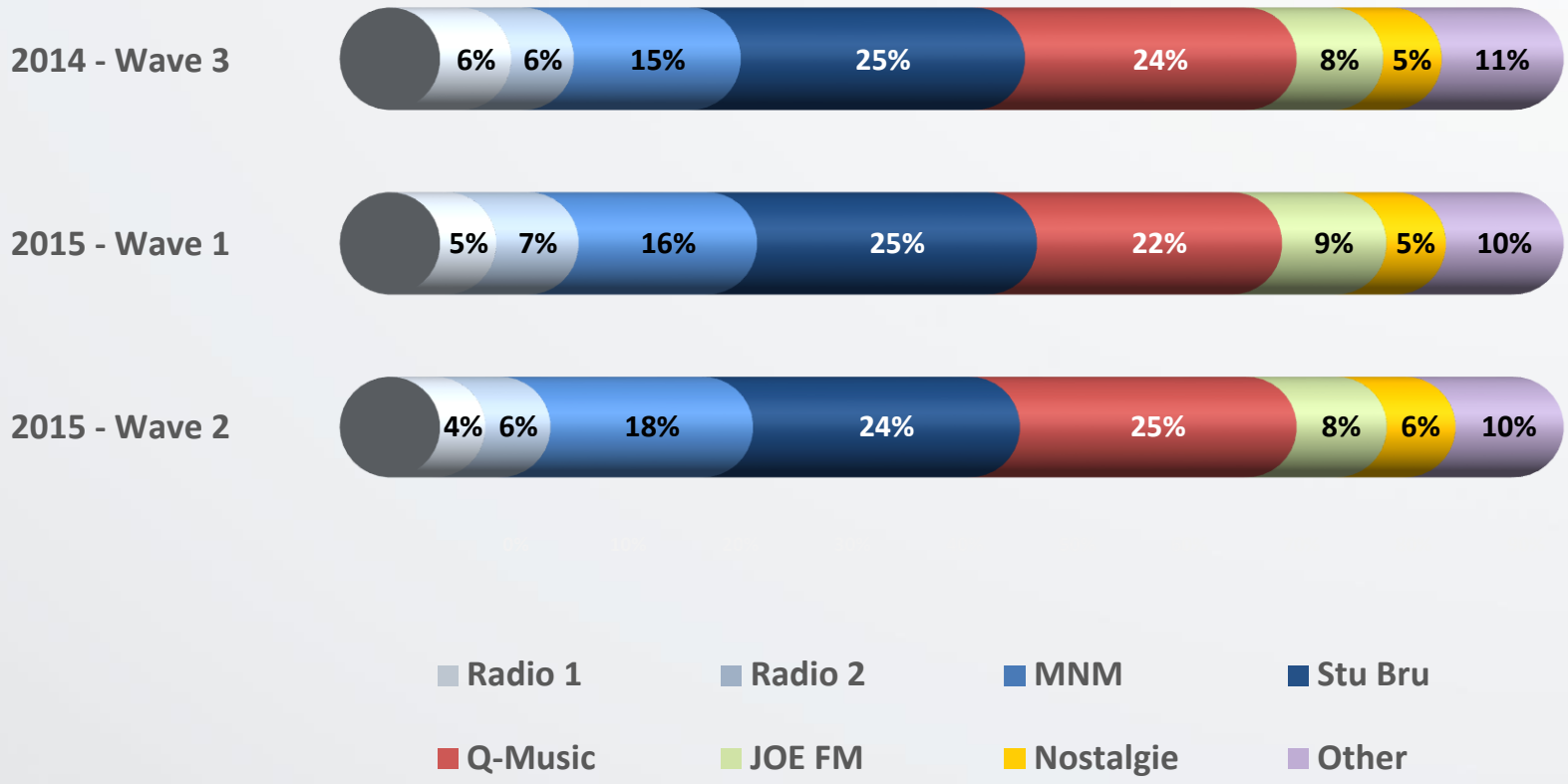
# Key Radio Figures North - Audience Shares on ALL 18-44

## Source: CIM Radio (07:00-19:00)

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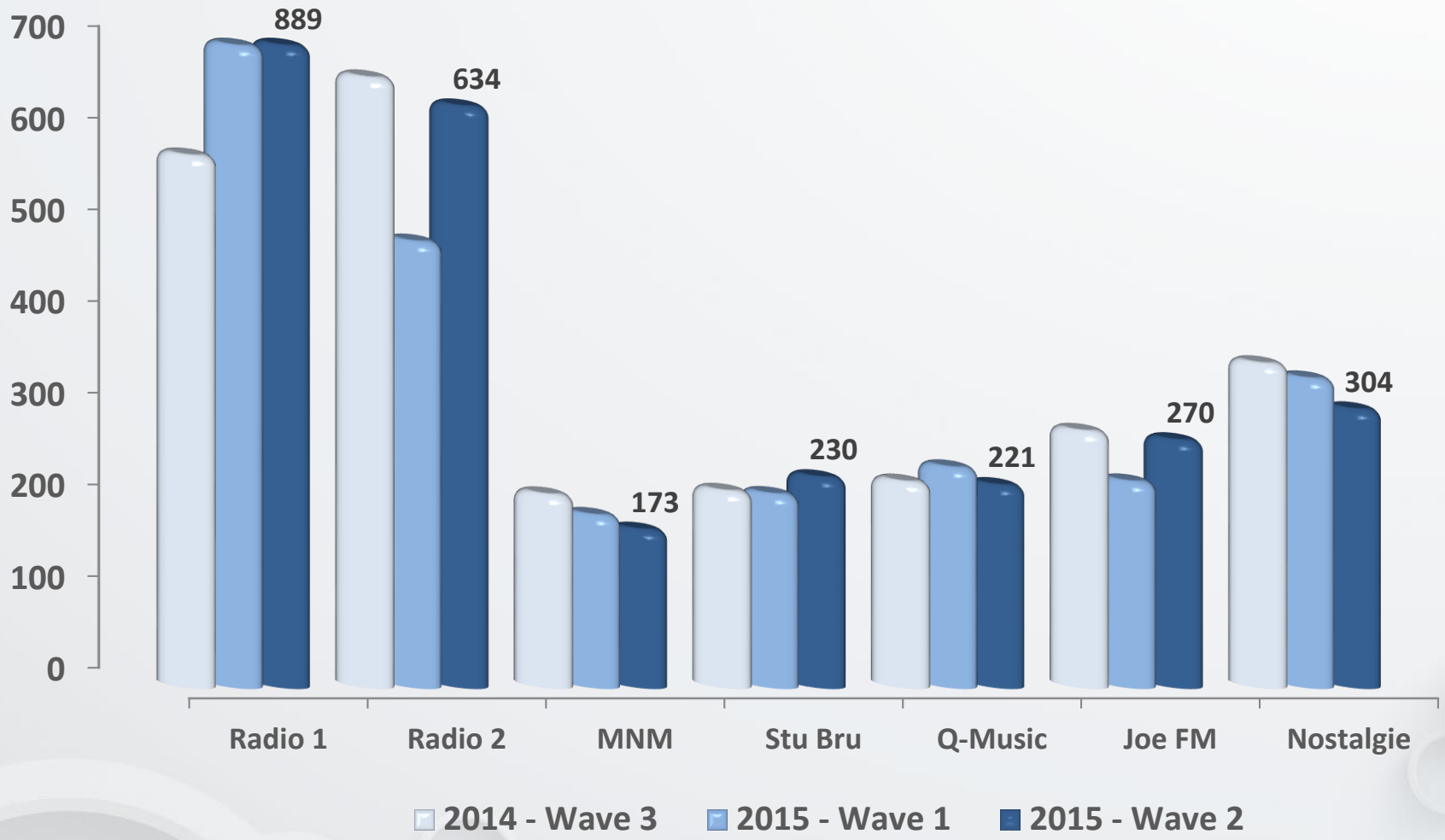
# Key Radio Figures North - Average C/GRP (€) on ALL 18-44

## Source: CIM Radio (07:00-19:00/Average Break)

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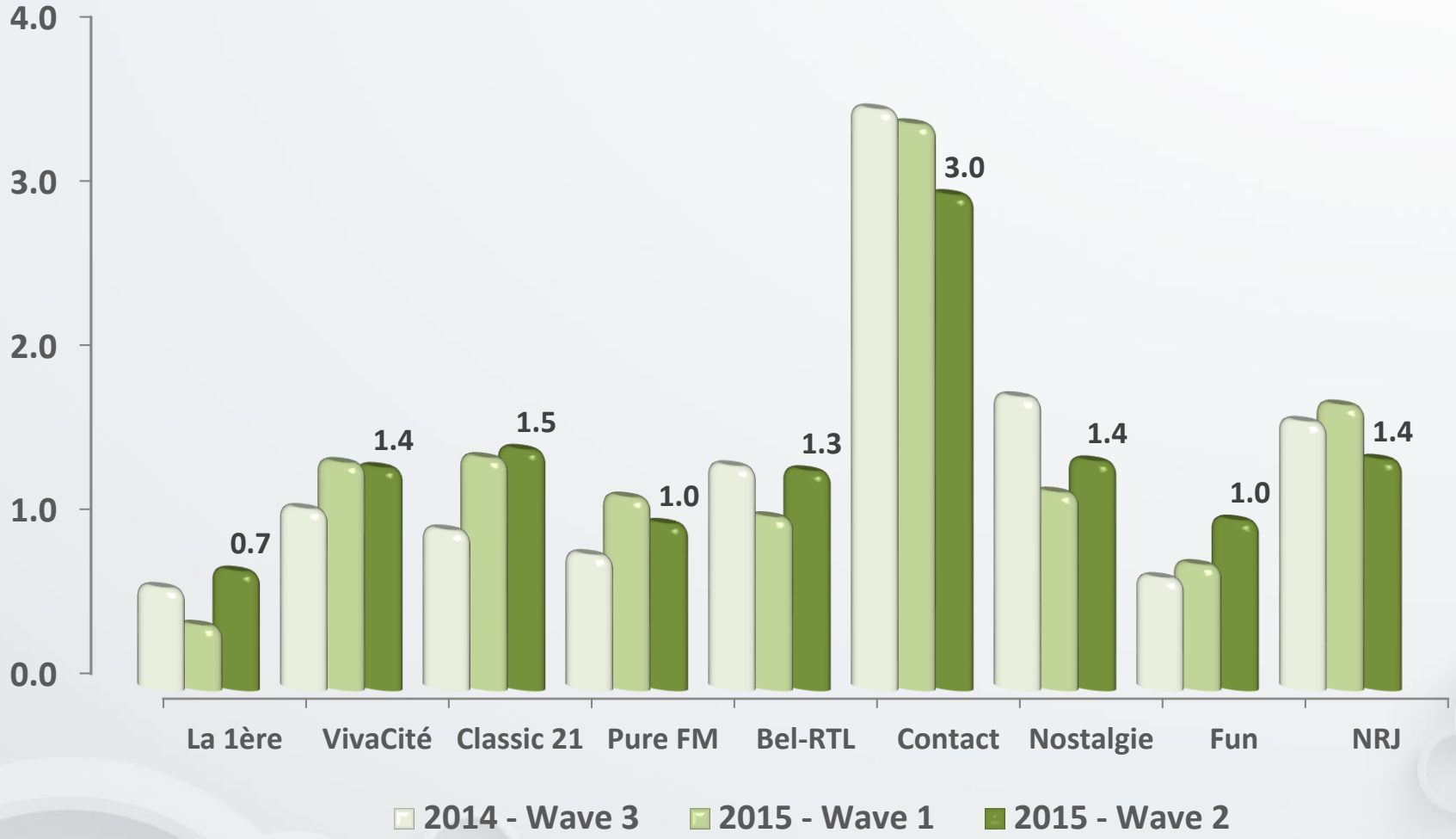
# Key Radio Figures South - Average Rating (%) on ALL 18-44

## Source: CIM Radio (07:00-19:00/Average Break Rating)

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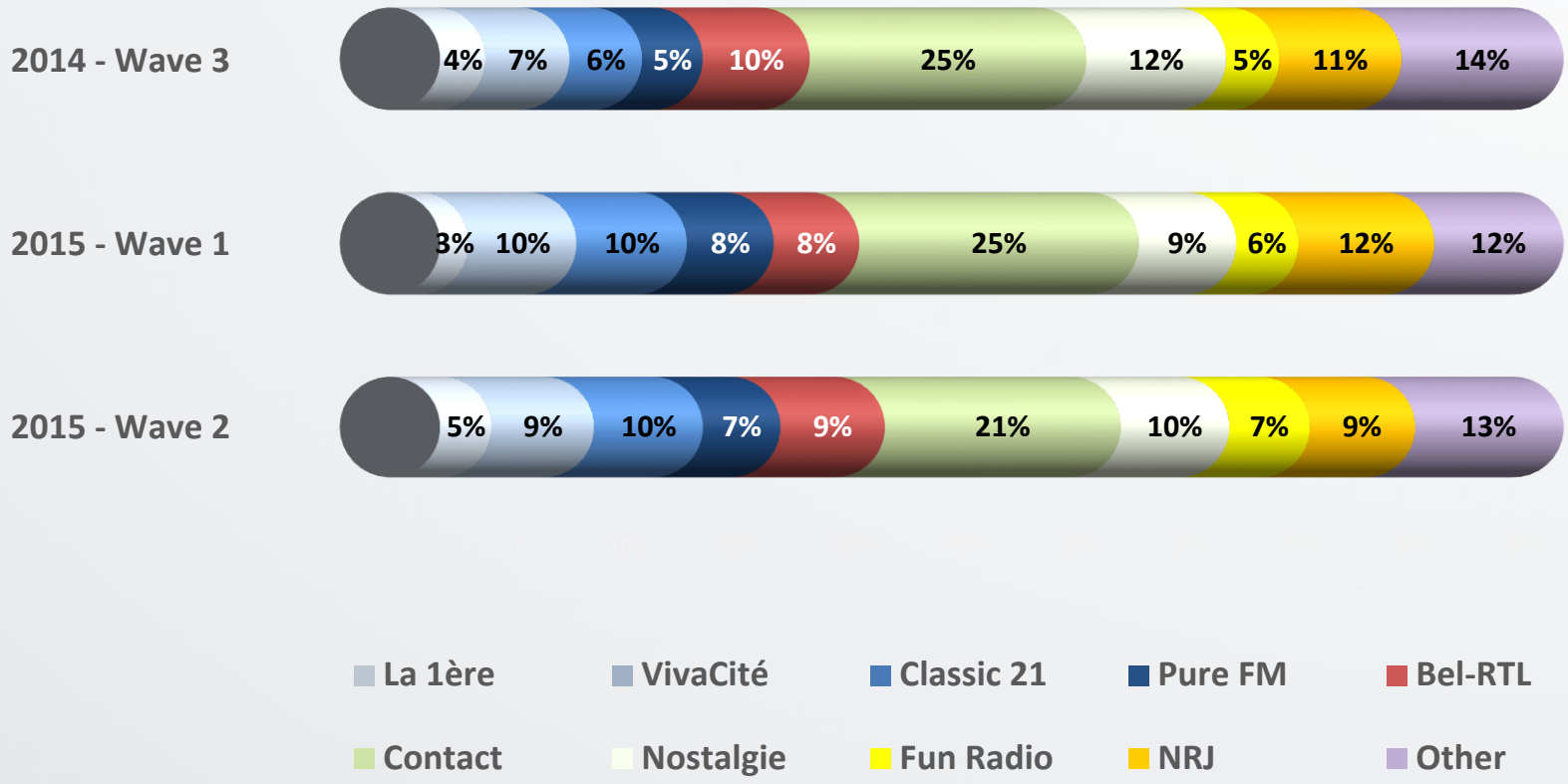
# Key Radio Figures South - Audience Shares on ALL 18-44

## Source: CIM Radio (07:00-19:00)

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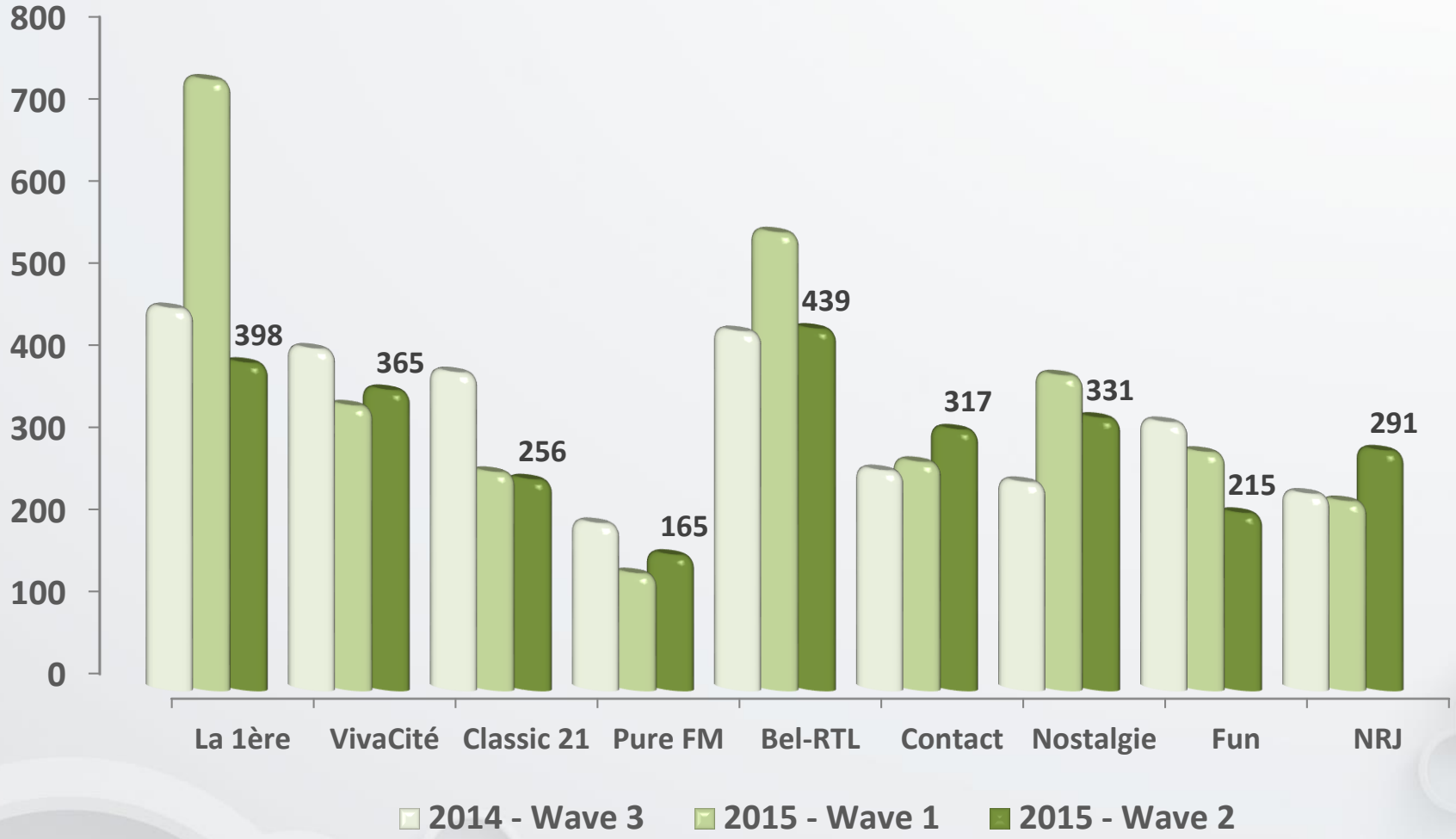
# Key Radio Figures South - Average C/GRP (€) on ALL 18-44

## Source: CIM Radio (07:00-19:00/Average Break)

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# PRINT CIRCULATION

# Key Print Figures
## Source: CIM Authentification

**Print Circulation:**
Number of copies sold/given on an average issue. **Quarterly delivery on a 4 quarters moving period.** Data's are either based on "declarations on honour" of publishers or "Cim-authentified" (once a year). Newpapers circulation includes digital sales.

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# Key Print Figures - Newspapers Circulation (Paid + Free)

## Q3 2014-Q2 2015 Source: CIM Authentification

| NORTH | Circulation | vs P-1 | % Digital |
|---|---|---|---|
| Het Laatste Nieuws | 281,068 | ↓ 96 | 1.5% |
| Het Nieuwsblad | 256,420 | ↓ 99 | 3.6% |
| De Standaard | 102,619 | ↑ 102 | 12.9% |
| Het Belang van Limburg | 96,770 | ↑ 102 | 5.7% |
| Gazet van Antwerpen | 94,348 | ↑ 102 | 3.9% |
| De Morgen | 55,257 | ↑ 101 | 19.3% |
| De Tijd | 40,821 | ↑ 101 | 31.5% |
| Total North | 927,303 | ↓ 99 | 6.4% |

| SOUTH | Circulation | vs P-1 | % Digital |
|---|---|---|---|
| Sud Presse | 95,073 | ↓ 94 | 4.4% |
| L'Avenir | 85,697 | ↓ 98 | 3.0% |
| Le Soir | 69,594 | ↓ 94 | 10.3% |
| DH/Les Sports | 45,897 | ↓ 91 | 4.1% |
| La Libre Belgique | 37,349 | ↓ 99 | 7.4% |
| L'Echo | 16,274 | ↓ 97 | 33.3% |
| Grenz Echo | 10,789 | ↓ 95 | 1.2% |
| Total South | 360,673 | ↓ 95 | 6.7% |

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# Key Print Figures - Magazines Circulation (Paid + Free)

## Q2 2014-Q1 2015 Source: CIM Authentification

| Categories | NL-speaking | | FR-speaking | | Both languages | |
|---|---|---|---|---|---|---|
| | Circulation | vs P-1 | Circulation | vs P-1 | Circulation | vs P-1 |
| Television | 881,078 | ↓ 98 | 504,680 | ↓ 93 | | |
| Women | 480,032 | ↓ 92 | 271,911 | ↓ 92 | | |
| Business & News | 125,128 | ↓ 97 | 160,630 | ↓ 97 | 43,501 | ↓ 99 |
| Generation (Youth/Senior) | 28,239 | ↓ 68 | 17,783 | ↓ 95 | 100,256 | ↓ 95 |
| Men | 58,075 | ↓ 90 | 19,114 | ↓ 95 | 43,523 | ↓ 95 |
| Lifestyle & Travel | | | | | 103,084 | ↓ 79 |
| Build & Deco | 16,225 | ↓ 94 | 18,215 | ↓ 90 | 48,304 | ↓ 84 |
| Other | | | 2,296 | ↓ 83 | | |
| TOTAL | 1,588,777 | ↓ 95 | 994,629 | ↓ 93 | 338,668 | ↓ 88 |

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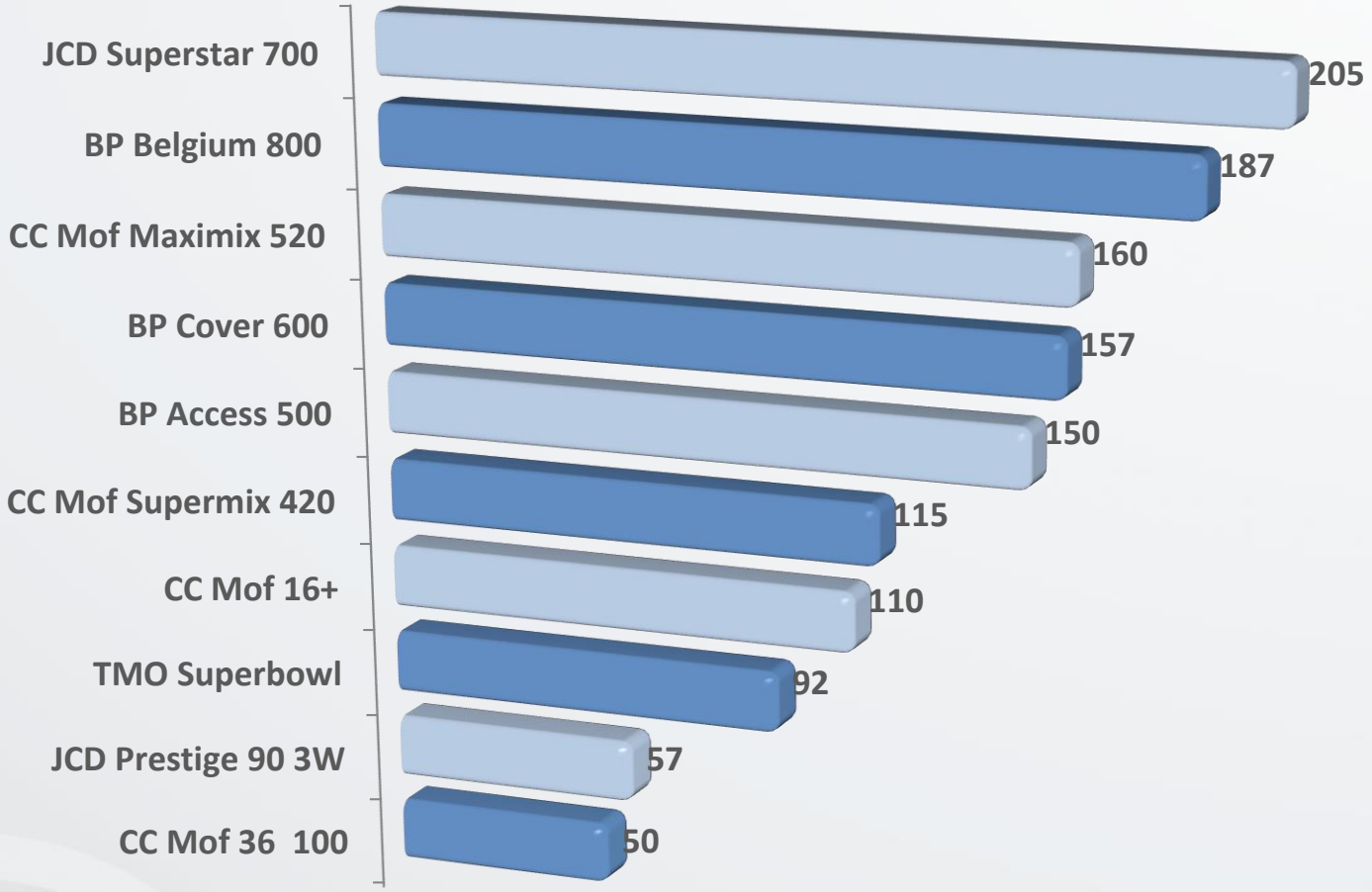
# KEY OOH FIGURES

# Key Outdoor Figures - Panoramic & Classic billboards
## GRP's per Day (National) on ALL 18-54
Source: CIM Traffic 2015 (Wave 1)

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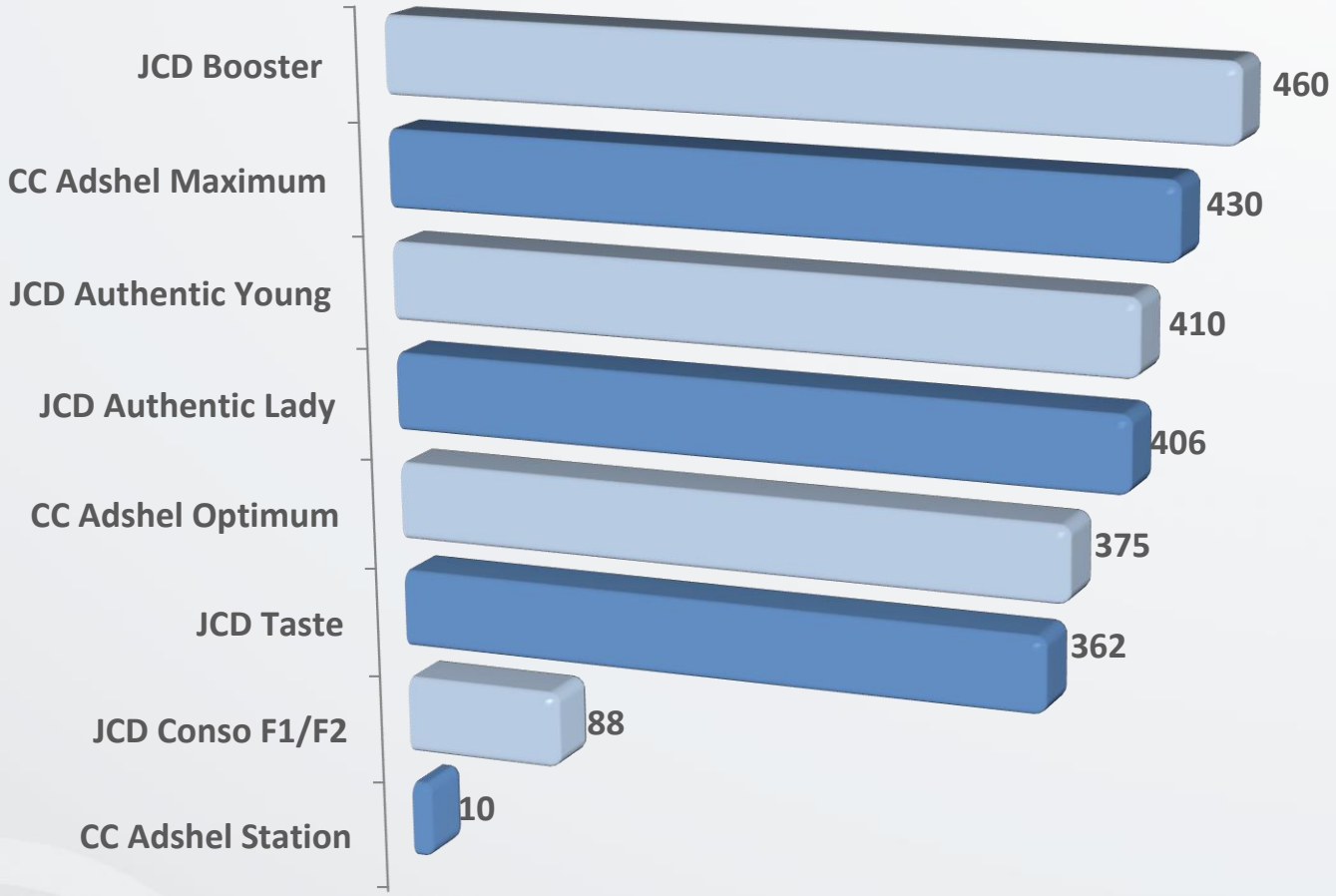
# Key Outdoor Figures - Street billboards
# GRP's per Day (National) on ALL 18-54

Source: CIM Traffic 2015 (Wave 1)

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