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MARKET PERFORMANCES BAROMETER

Status August 2018

- Gross media investments evolution p.4
- Key TV figures p.7
- Top websites p.14
- Key radio figures p.18
- Print circulation p.25
- OOH ratings p.29

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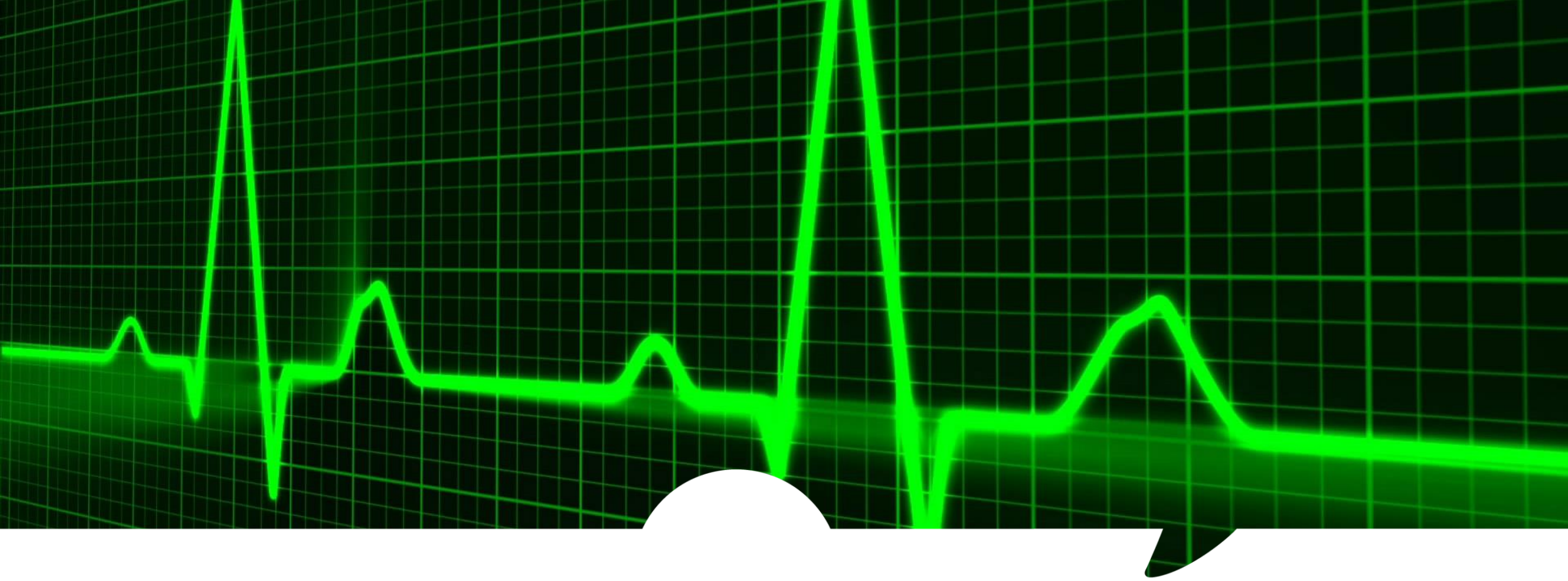


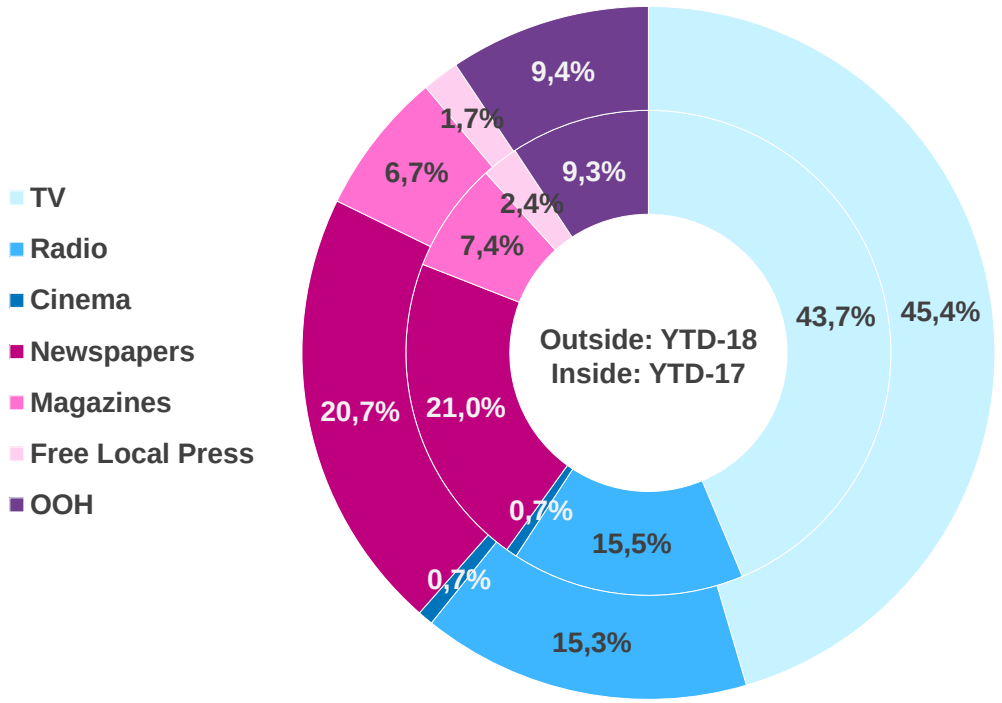
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION Jan-Jul 2018

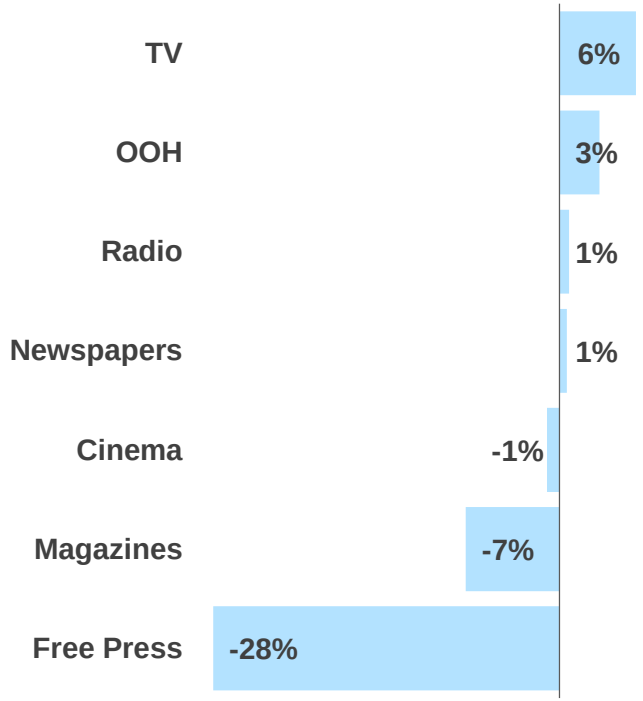
Source: MDB / Nielsen

Market	National	North	South
• € Mo • vs YTD-17 * • % Region	• 2.036,0 • + 2,0% • 100%	• 1206,1 • + 0,6% • 59%	• 829,9 • + 4,0% • 41%

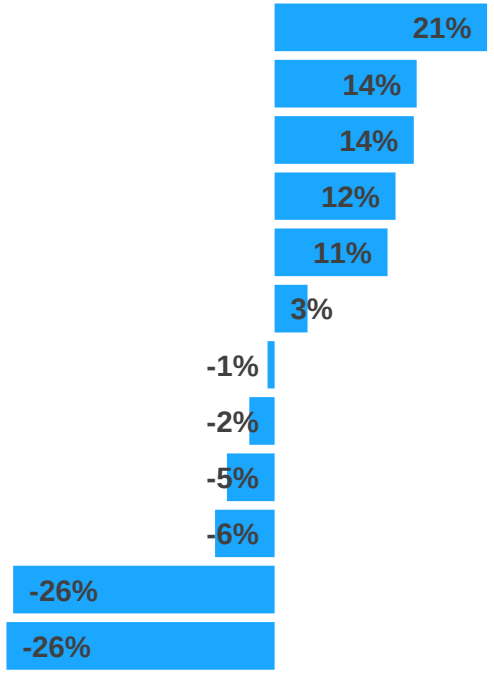
Media Mix Evol.



Media Evol. (vs YTD-17)



Ecogroups Evol. (vs YTD-17)



NB : Internet 2018 (declarative) figures are not published yet => internet is not included here !

MDB TOP 30 ADVERTISERS - Jan-Jul 2018

Source: MDB / Nielsen - Gross investments in € Mo (only commercial companies - internet not included)

Rank	ADV.GROUP	Gross Inv.	vs YTD-17
1	PROCTER & GAMBLE	67,41	119
2	COCA-COLA COMPANY	46,88	158
3	D'IETEREN GROUP	44,0	100
4	RECKITT & BENCKISER	34,2	90
5	UNILEVER	34,1	113
6	PSA GROUPE	32,9	140
7	PROXIMUS GROUP	30,8	119
8	RENAULT-NISSAN ALLIANCE	22,3	96
9	COLRUYT GROUP	21,6	109
10	TELENET GROUP HOLDING	20,1	106
11	ANHEUSER BUSCH INBEV	19,4	222
12	ORANGE	19,3	87
13	MONDELEZ INTERNATIONAL	18,0	92
14	DANONE GROUP	16,3	101
15	L'OREAL GROUP	16,1	117

Rank	ADV.GROUP	Gross Inv.	vs YTD-17
16	FIAT CHRYSLER AUTOMOBILES	16,0	90
17	BEIERSDORF	15,0	119
18	DAIMLER BENZ GROUP	14,0	99
19	LOTERIE NATIONALE	13,3	134
20	THE WALT DISNEY COMPANY	12,6	127
21	AHOLD DELHAIZE	12,3	108
22	FERRERO	11,8	118
23	ALDI	11,8	1260
24	NETHYS	11,6	105
25	JAGUAR LAND ROVER BELUX	11,4	184
26	FORD MOTOR COMPANY	11,3	113
27	BNP-PARIBAS	11,2	104
28	GLAXOSMITHKLINE	11,1	79
29	ING GROUP	10,8	118
30	BELFIUS	10,8	122

NB : Internet 2018 (declarative) figures are not published yet => internet is not included here !

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Key TV Figures

Key TV figures North - Aug-18

Source: CIM TV - Live +7 including guests

CHANNEL	CHANNEL's MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Aug-18	YTD	Aug-18	YTD	Aug-18	YTD
VTM	PRP 18-54	4,4	6,2	21,6	23,6	739	881
Q2	PRP 18-44	1,7	1,9	9,3	8,3	702	829
VITAYA	PRP 18-54	1,2	1,2	6,0	4,7	676	797
CAZ	MEN 18-54	0,6	0,5	3,2	2,2	*Package*	*Package*
VIER	PRP 18-54	1,8	2,5	8,9	9,7	697	975
VIJF	PRP 18-54	1,3	1,6	6,4	6,2	645	733
ZES	PRP 18-54	0,6	0,6	2,9	2,4	*Package*	*Package*
Total TV	PRP 18-54	20,5	26,2				
Total TV	PRP 18-44	18,3	23,4				
Total TV	MEN 18-54	17,5	22,1				

Key TV indexes North - Aug-18

Source: CIM TV - Live +7 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	
		Aug-18	YTD	Aug-18	YTD	Aug-18	YTD
VTM	PRP 18-54	80	93	90	94	111	106
Q2	PRP 18-44	88	95	97	95	113	107
VITAYA	PRP 18-54	125	102	140	103	123	116
CAZ	MEN 18-54	100	102	111	102	*Package*	*Package*
VIER	PRP 18-54	88	93	99	95	108	113
VIJF	PRP 18-54	78	107	88	108	122	103
ZES	PRP 18-54	118	134	133	136	*Package*	*Package*
Total TV	PRP 18-54	89	99				
Total TV	PRP 18-44	90	100				
Total TV	MEN 18-54	90	99				

Time Shift Viewing & Other TV Screen Usage Evolution

Market: NORTH - Period: Jan-Aug - Targetgroup: ALL 18-54

Source: CIM TV - Live +6 including guests (2015) / Live +7 including guests (2016+)

Variable	Channel	Daypart	YTD-15	YTD-16	YTD-17	YTD-18	18 vs 17
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	27,5%	27,3%	27,8%	27,5%	99
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	87,3%	85,2%	85,3%	83,0%	97
	VHS + DVD player + Blue Ray	"	3,9%	4,5%	4,2%	3,6%	87
	Video on demand + Digital recorder	"	7,9%	8,9%	9,2%	11,9%	128
	Game console and other devices (3)	"	0,9%	1,3%	1,4%	1,6%	115
% Time shift viewing (4)	All Channels	"	12,0%	15,4%	23,1%	24,8%	107
	Main Channels (5)	"	14,7%	19,7%	25,6%	29,4%	115
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	85	87	86	
	Main channels (5) - TSV	"	27	29	31	34	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	124	114	106	102	96
	All TV channels (TSV)	"	14	18	27	29	105
	All TV channels (Live + TSV)	"	137	132	134	131	98
	Other TV Screen Usage	"	27	30	31	35	115
	Total TV Screen Usage	"	164	161	164	166	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 (guests included) (5) : Main channels = VTM + Q2 + Vitaya + VIER + VIJF

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Key TV figures South - Aug-18

Source: CIM TV - Live +7 including guests

CHANNEL	CHANNEL's MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Aug-18	YTD	Aug-18	YTD	Aug-18	YTD
RTL-TVI	PRP 18-54	5,6	6,9	25,4	25,7	677	790
Club-RTL	MEN 18-54	1,5	1,4	8,6	6,7	620	861
Plug-RTL	ALL 15-34	0,4	0,6	3,5	4,0	764	901
La Une	PRP 18-54	3,0	3,8	13,5	14,2	402	690
La Deux	PRP 18-54	1,1	2,2	4,9	8,0	396	638
AB3	PRP 18-44	1,6	2,2	8,7	9,5	496	623
TF1	PRP 18-54	3,0	3,4	13,6	12,7	*Package*	*Package*
TTV	PRP 18-54	21,9	26,8				
TTV	PRP 18-44	18,4	23,0				
TTV	ALL 15-34	11,3	15,1				
TTV	MEN 18-54	16,8	21,2				

Key TV indexes South - Aug-18

Source: CIM TV - Live +7 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	
		Aug-18	YTD	Aug-18	YTD	Aug-18	YTD
RTL-TVI	PRP 18-54	91	91	101	96	114	110
Club-RTL	MEN 18-54	108	100	118	102	102	112
Plug-RTL	ALL 15-34	69	73	87	81	140	126
La Une	PRP 18-54	90	100	100	105	105	110
La Deux	PRP 18-54	68	142	75	150	127	114
AB3	PRP 18-44	109	99	122	104	148	111
TF1	PRP 18-54	79	79	88	83	*Package*	*Package*
TTV	PRP 18-54	90	95				
TTV	PRP 18-44	89	94				
TTV	ALL 15-34	80	91				
TTV	MEN 18-54	92	98				

Time Shift Viewing & Other TV Screen Usage Evolution
Market: SOUTH - Period: Jan-Aug - Targetgroup: ALL 18-54
Source: CIM TV - Live +6 including guests (2015) / Live +7 including guests (2016+)

Variable	Channel	Daypart	YTD-15	YTD-16	YTD-17	YTD-18	18 vs 17
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	31,8%	33,1%	31,9%	31,2%	98
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	81,0%	81,2%	78,1%	75,3%	97
	VHS + DVD player + Blue Ray	"	7,9%	6,9%	7,3%	6,6%	91
	Video on demand + Digital recorder	"	9,9%	11,1%	13,9%	17,3%	124
	Game console and other devices (3)	"	1,2%	0,9%	0,7%	0,8%	104
% Time shift viewing (4)	All Channels	"	8,3%	12,4%	17,9%	20,2%	113
	Main Channels (5)	"	9,1%	13,3%	19,5%	20,7%	106
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	90	88	89	83	
	Main channels (5) - TSV	"	42	55	52	52	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	158	158	138	127	92
	All TV channels (TSV)	"	12	19	26	26	100
	All TV channels (Live + TSV)	"	170	176	164	152	93
	Other TV Screen Usage	"	48	50	53	59	110
	Total TV Screen Usage	"	217	226	217	211	97

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

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

Key Digital Figures - TOP BELGIAN WEBSITES - Aug-18

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

Rank	Website	Daily Unique Browsers
1	HLN.be	1.226.584
2	Nieuwsblad	976.872
3	2dehands.be-2ememain.be	567.761
4	De Standaard	316.275
5	Sporza	311.365
6	SudInfo	301.045
7	VRT	293.483
8	RTBF.be	257.721
9	Gazet van Antwerpen	257.592
10	DH.be	244.360

Rank	Website	Daily Unique Browsers
11	RTL.be	242.272
12	Immoweb	210.639
13	Le Soir	204.681
14	Het Belang van Limburg	186.433
15	Knack-Le Vif	166.679
16	De Morgen	162.526
17	Buienradar	162.367
18	7sur7.be	124.643
19	La Libre.be	119.973
20	L'Avenir.net	119.086

Key Digital Figures - TOP Non-CIM WEBSITES - Dec-17

Source: COMSCORE

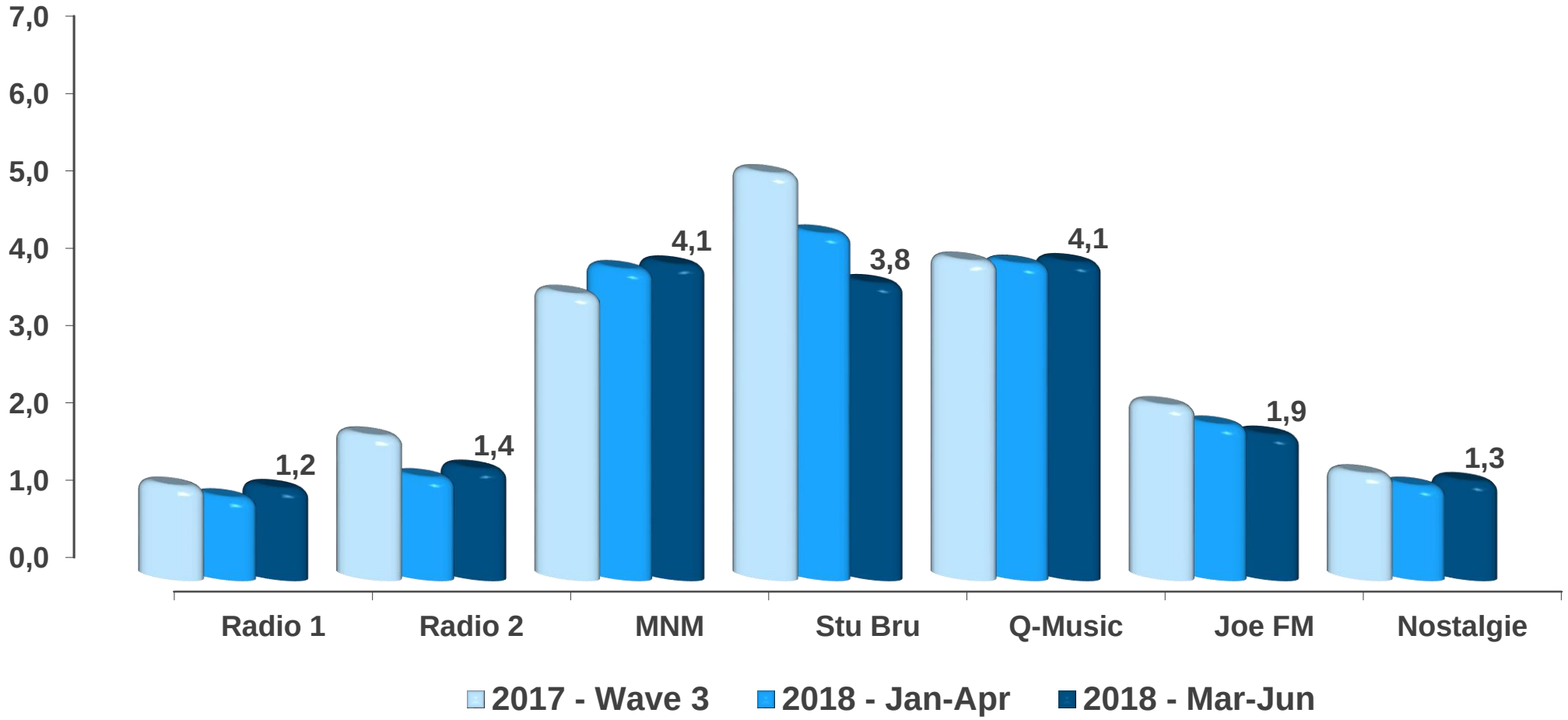
Website	Daily Visitors (000)
MSN.COM	1.022
GOOGLE.BE	1.012
MSN.BE	866
FACEBOOK.COM	657
LINKEDIN.COM	630
LIVE.COM	615
GOOGLE.COM	433
BING.COM	365
YOUTUBE.COM	327
YAHOO.COM	265

NB: Comscore stopped measuring the Belgian market on December 31, 2017

Key Radio Figures

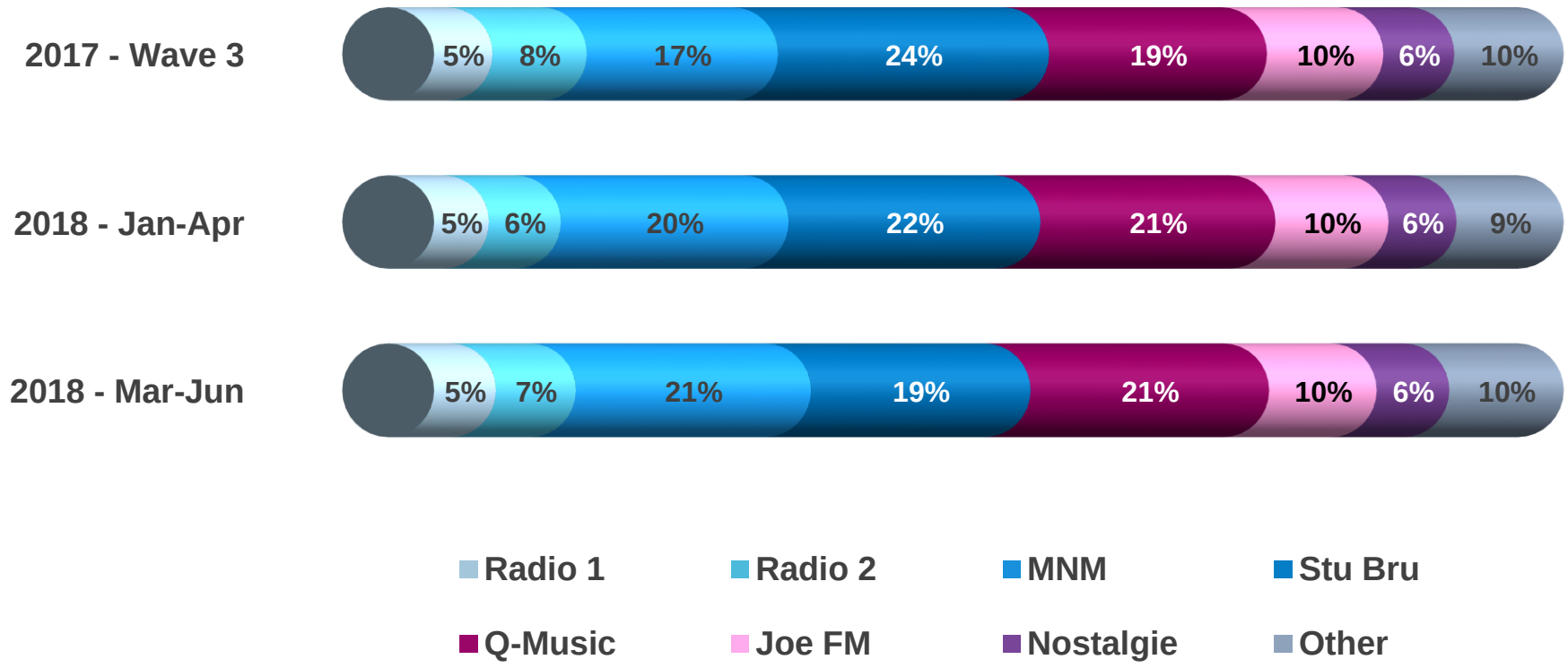
KEY RADIO FIGURES NORTH
Average break rating (%) on ALL 18-44 - 07:00-19:00

Source: 2017 CIM Radio (2017) New CIM RAM (2018)
Warning: New methodology in 2018 - CIM recommends not to compare 2018 figures with older waves



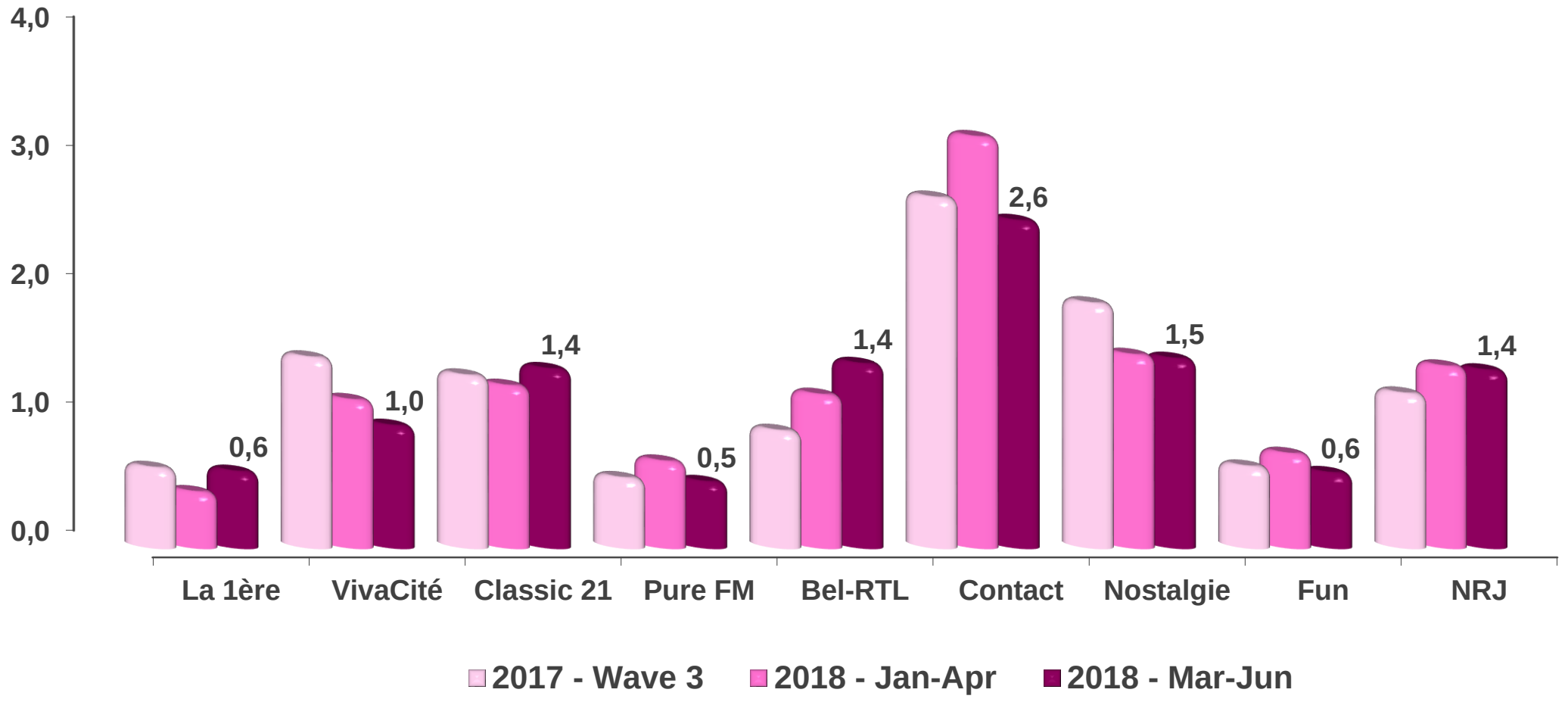
KEY RADIO FIGURES NORTH
Audience shares on ALL 18-44 - 07:00-19:00

Source: 2017 CIM Radio (2017) New CIM RAM (2018)
Warning: New methodology in 2018 - CIM recommends not to compare 2018 figures with older waves



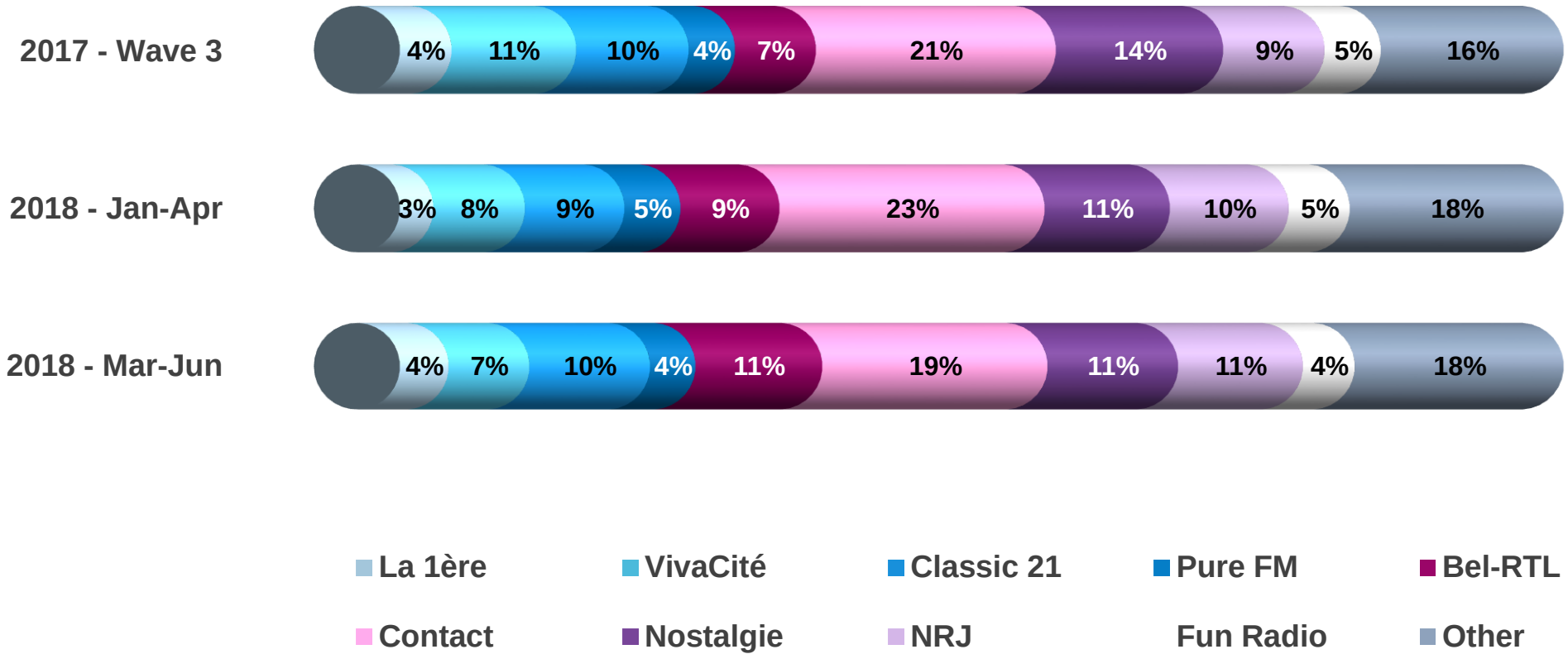
KEY RADIO FIGURES SOUTH
Average break rating (%) on ALL 18-44 - 07:00-19:00

Source: 2017 CIM Radio (2017) New CIM RAM (2018)
Warning: New methodology in 2018 - CIM recommends not to compare 2018 figures with older waves



KEY RADIO FIGURES NORTH
Audience shares on ALL 18-44 - 07:00-19:00

Source: 2017 CIM Radio (2017) New CIM RAM (2018)
Warning: New methodology in 2018 - CIM recommends not to compare 2018 figures with older waves



Print Circulation

Key Print Figures – Newspapers/Magazines circulation

Source: CIM Press Brand Report

Print Circulation:

Number of copies sold/given on an average issue. **Yearly delivery.** “Cim-authentified” datas. Includes digital sales.

Key Print Figures
Newspapers Circulation (Paid + Free - digital sales included)
Year 2017 (Source: CIM Press Brand Report / CIM Circulation)

NORTH	Circulation	vs 2016	% Digital
Het Laatste Nieuws	260.337	95	5,7%
Het Nieuwsblad	228.629	95	5,1%
De Standaard	101.032	100	20,1%
Het Belang van Limburg	91.500	97	6,5%
Gazet van Antwerpen	84.872	96	6,1%
De Morgen	51.375	92	32,6%
De Tijd	42.385	104	38,6%
Total North	860.130	96	10,6%

SOUTH	Circulation	vs 2016	% Digital
L'Avenir	80.221	97	7,6%
Sud Presse	79.993	89	6,4%
Le Soir	61.863	90	15,4%
La DH	37.793	91	7,5%
La Libre Belgique	34.721	97	14,8%
L'Echo	16.291	92	41,9%
Grenz Echo	9.999	98	3,2%
Total South	320.881	92	11,2%

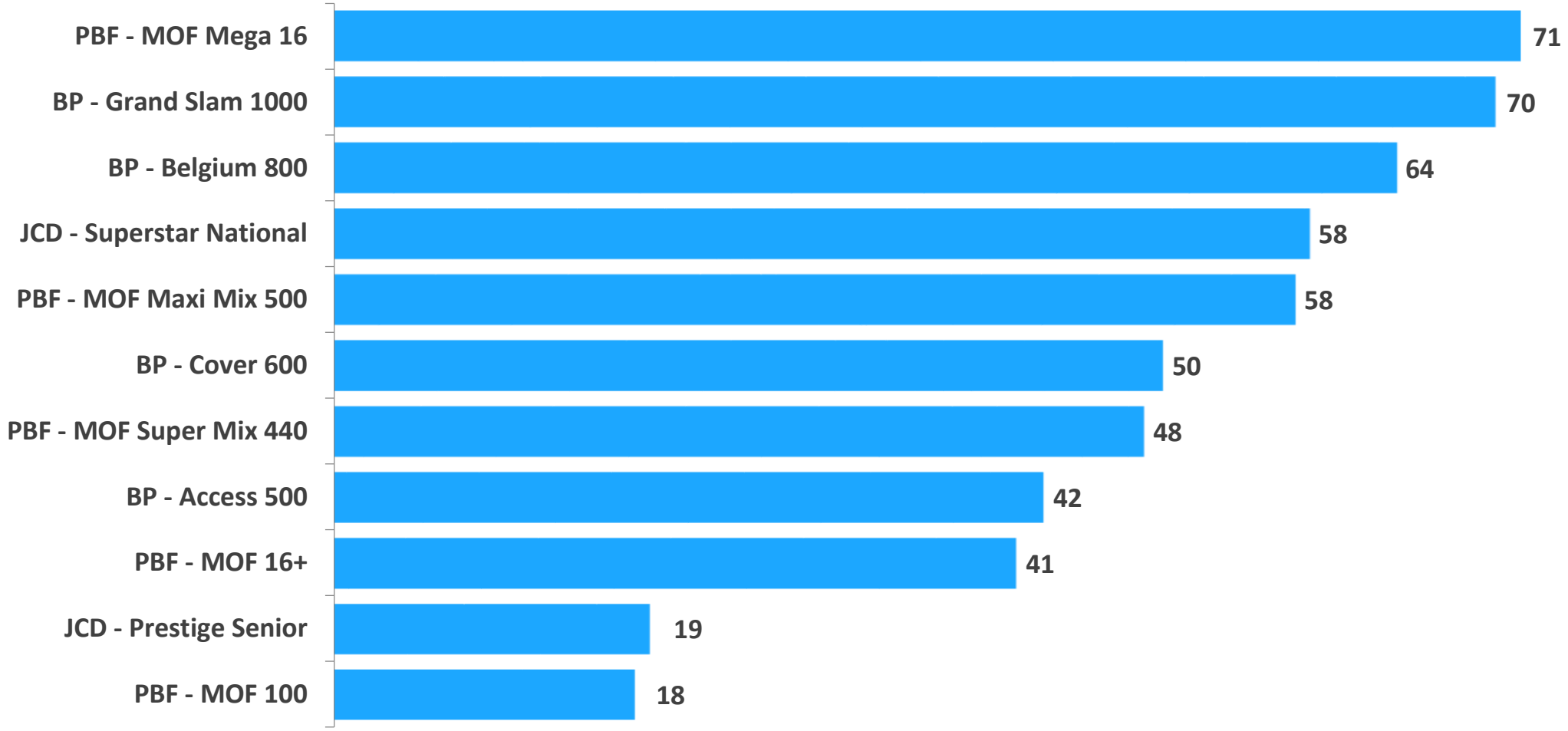
Key Print Figures
Magazines Circulation (Paid + Free - digital sales included)
Year 2017 (Source: CIM Press Brand Report / CIM Circulation)

Categories	NL-speaking		FR-speaking		Both languages	
	Circulation	vs 2016	Circulation	vs 2016	Circulation	vs 2016
Television	672.928	↓ 93	421.637	↓ 93		
Women	354.047	↓ 90	189.236	↓ 93		
Business & News	118.715	↓ 97	144.940	↓ 97	54.689	↑ 112
Generation (Youth/Senior)			16.328	↓ 93	115.418	↑ 106
Men	28.299	↓ 98	17.699	↓ 97	47.434	↑ 102
Lifestyle & Travel					81.059	↓ 97
Build & Deco	14.072	↓ 95	14.955	↓ 92	17.908	↓ 90
TOTAL	1.188.061	↓ 92	804.795	↓ 94	316.508	↑ 103

OOH ratings

Key OOH Figures - Panoramic & Classic billboards VRP's* per day (National) on ALL 18-54

Source: CIM OOH 2017-01 / * : Visibility adjusted Rating Point



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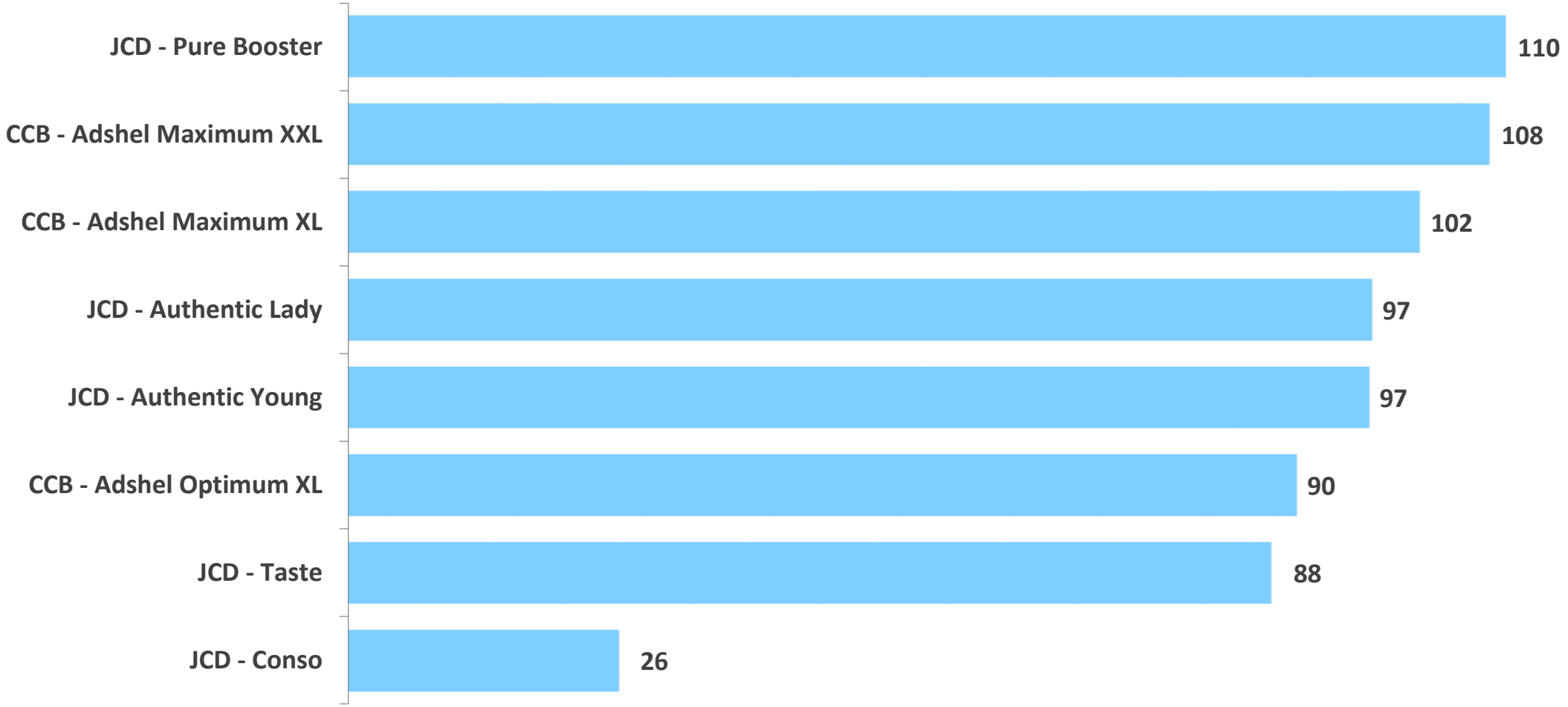
Key OOH Figures - Street billboards
VRP's* per day (National) on ALL 18-54

Source: CIM OOH 2017-01 / * : Visibility adjusted Rating Point



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