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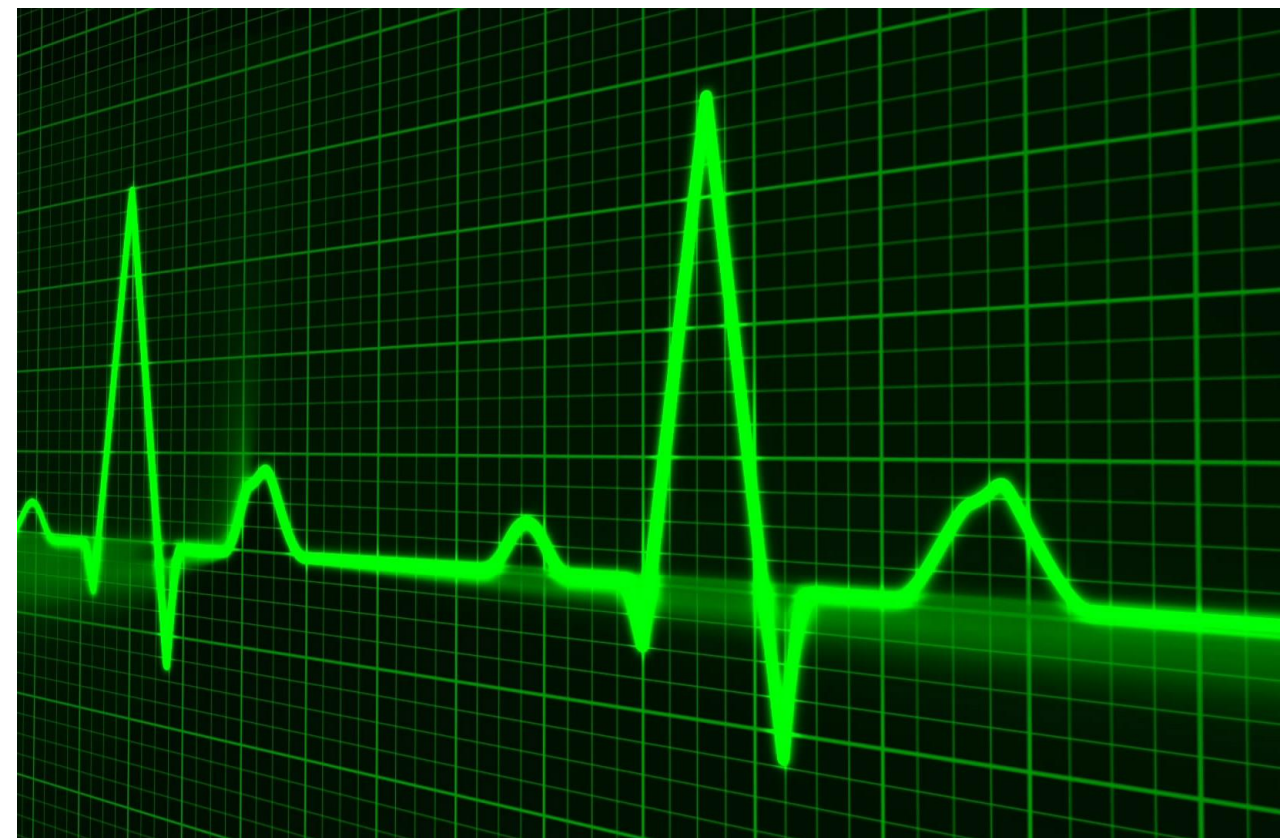
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

November 2019



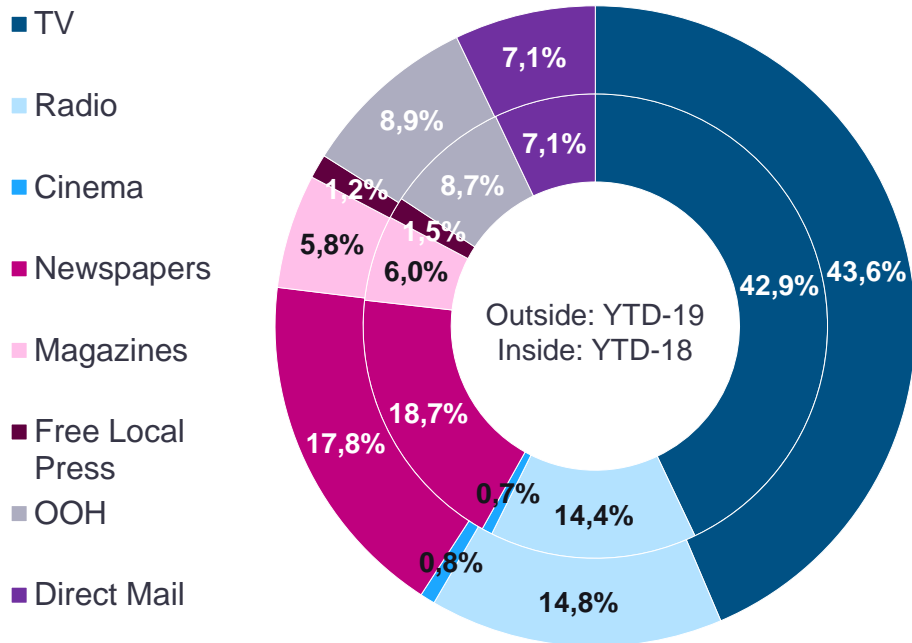
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Oct 2019

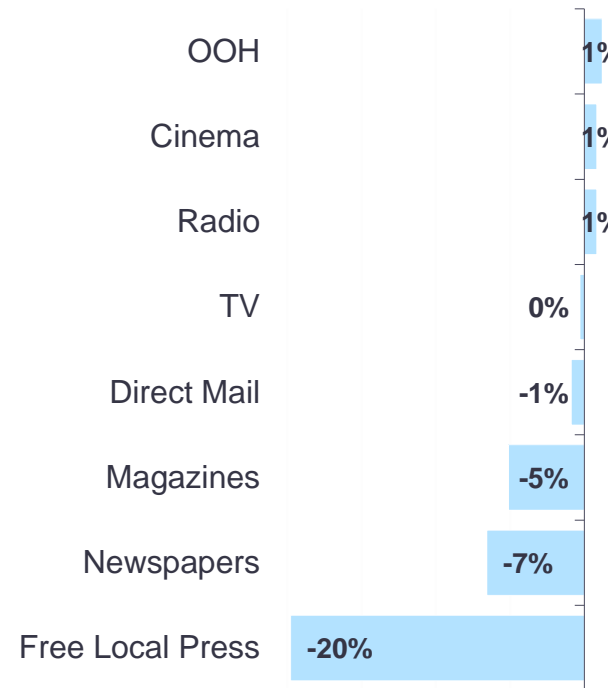
NB : 1) No Internet figures in MDB for 2018 & 2019. 2) Direct Mail : New in 2019.

Market	National	North	South
<ul style="list-style-type: none"> € Mo vs YTD-18 % Region 	3.199,1 - 1,8% 100%	1.965,9 + 0,4% 61%	233,1 - 5,1% 39%

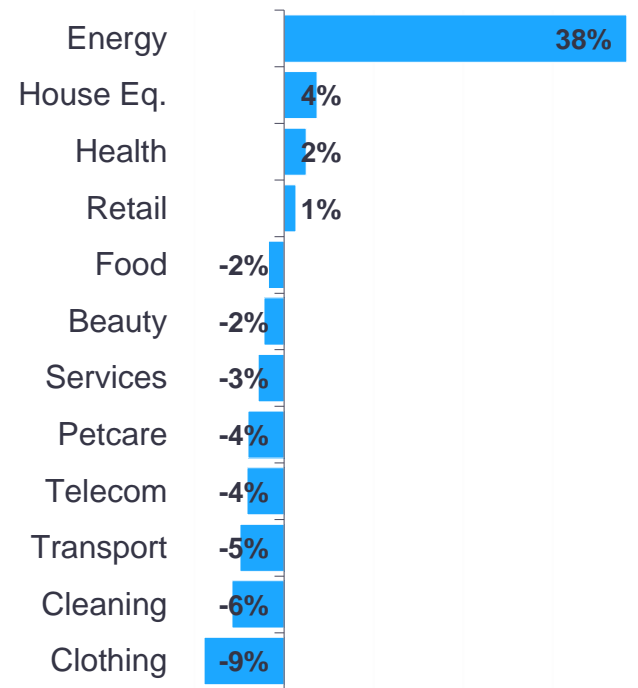
Media Mix Evol.



Media Evol. (vs YTD-18)



EcoGroups Evol. (vs YTD-18)



MDB TOP 30 ADVERTISERS - Jan-Oct 2019

NB : 1) No Internet figures in MDB for 2018 & 2019. 2) Direct Mail : New in 2019.

Rank	ADV.GROUP	Gross Inv.	vs YTD-18
1	PROCTER & GAMBLE	95,0	↓ 94
2	COLRUYT GROUP	81,4	↓ 96
3	THE COCA-COLA COMPANY	66,0	↓ 91
4	D'IETEREN GROUP	59,1	↓ 87
5	PSA GROUPE	48,9	↑ 104
6	RECKITT & BENCKISER	45,4	↓ 94
7	UNILEVER	45,0	↔ 101
8	AHOLD DELHAIZE	41,9	↑ 129
9	PROXIMUS GROUP	40,9	↓ 83
10	FERRERO	37,7	↑ 176
11	RENAULT-NISSAN ALLIANCE	32,9	↑ 102
12	VINTED	32,0	-
13	CARREFOUR GROUP	31,0	↑ 116
14	TELENET GROUP HOLDING	30,4	↓ 93
15	ORANGE	30,0	↓ 98

Rank	ADV.GROUP	Gross Inv.	vs YTD-18
16	L'OREAL GROUP	24,0	↓ 91
17	THE WALT DISNEY COMPANY	21,7	↑ 102
18	MONDELEZ INTERNATIONAL	21,1	↓ 88
19	NETHYS	20,7	↑ 130
20	LOTERIE NATIONALE	20,2	↓ 92
21	FIAT CHRYSLER AUTOMOBILES	19,9	↓ 82
22	ALDI	19,0	↑ 107
23	AS WATSON	18,1	↑ 104
24	BMW GROUP BELGIUM	18,1	↑ 120
25	COLGATE-PALMOLIVE	18,0	↑ 121
26	BEIERSDORF	17,5	↓ 80
27	LIDL & CO	17,1	↑ 129
28	GROUPE 3 SUISSES	16,6	↓ 94
29	DANONE GROUP	16,4	↓ 70
30	METRO GROUP	16,2	↑ 108



Key TV figures

Key TV figures North - Nov-19

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Nov-19	YTD	Nov-19	YTD	Nov-19	YTD
VTM	PRP 18-54	7,6	6,3	25,9	24,0	975	961
Q2	PRP 18-44	1,8	1,6	7,2	7,0	844	959
VITAYA	PRP 18-54	1,3	1,3	4,5	5,1	857	887
CAZ	MEN 18-54	0,5	0,5	2,2	2,2	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	4,4	3,4	15,1	12,8	1.077	964
VIJF	PRP 18-54	1,5	1,5	5,1	5,6	768	796
ZES	PRP 18-54	0,7	0,6	2,3	2,2	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	29,2	26,3				
Total TV	PRP 18-44	24,8	22,7				
Total TV	MEN 18-54	24,1	21,7				

Key TV indexes North - Nov-19

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	
		Nov-19	YTD	Nov-19	YTD	Nov-19	YTD
VTM	PRP 18-54	↓ 98	↓ 96	↑ 102	↓ 98	✓ 100	✗ 108
Q2	PRP 18-44	↓ 83	↓ 81	↓ 89	↓ 86	✓ 86	✗ 112
VITAYA	PRP 18-54	↓ 82	↑ 105	↓ 85	↑ 106	✗ 107	✗ 121
CAZ	MEN 18-54	↓ 93	→ 100	↓ 96	↑ 103	Package	Package
VIER	PRP 18-54	↓ 90	↑ 110	↓ 94	↑ 113	✗ 104	✗ 103
VIJF	PRP 18-54	↑ 103	↓ 92	↑ 107	↓ 94	✓ 90	✗ 103
ZES	PRP 18-54	↑ 105	↓ 92	↑ 109	↓ 94	Package	Package
Total TV	PRP 18-54	↓ 96	↓ 98				
Total TV	PRP 18-44	↓ 93	↓ 95				
Total TV	MEN 18-54	↓ 97	↓ 97				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

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

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

Variable	Channel	Daypart	YTD-16	YTD-17	YTD-18	YTD-19	19 vs 18
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	27,9%	28,4%	28,1%	28,0%	100
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	85,8%	85,6%	83,0%	81,4%	98
	VHS + DVD player + Blu-Ray	"	4,3%	4,0%	3,5%	2,4%	70
	Video on demand + Digital recorder	"	8,6%	9,2%	11,9%	14,5%	122
	Game console and other devices (3)	"	1,3%	1,3%	1,6%	1,7%	103
% Time shift viewing (4)	All Channels	"	17,9%	23,8%	25,9%	29,2%	113
	Main Channels (5)	"	21,9%	26,7%	30,3%	33,3%	110
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	85	87	86	85	
	Main channels (5) - TSV	"	28	31	33	34	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	113	107	102	96	94
	All TV channels (TSV)	"	21	29	30	32	107
	All TV channels (Live + TSV)	"	134	136	132	127	97
	Other TV Screen Usage	"	29	31	36	38	105
	Total TV Screen Usage	"	163	166	167	165	99

Key TV figures South - Nov-19

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Nov-19	YTD	Nov-19	YTD	Nov-19	YTD
RTL-TVI	PRP 18-54	6,8	6,5	24,6	25,5	1.039	832
Club-RTL	MEN 18-54	1,3	1,3	6,3	6,8	1.174	889
Plug-RTL	ALL 15-34	0,5	0,6	3,3	3,8	1.057	810
La Une	PRP 18-54	4,4	3,7	15,8	14,3	698	638
La Deux	PRP 18-54	1,6	1,4	5,7	5,3	770	602
AB3	PRP 18-44	2,3	2,3	9,9	10,4	765	663
TF1	PRP 18-54	3,5	3,0	12,5	11,5	633	611
TTV	PRP 18-54	27,6	25,6				
TTV	PRP 18-44	23,2	21,7				
TTV	ALL 15-34	15,9	14,6				
TTV	MEN 18-54	20,2	19,4				

Key TV indexes South - Nov-19

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	
		Nov-19	YTD	Nov-19	YTD	Nov-19	YTD
RTL-TV1	PRP 18-54	↓ 85	↓ 93	↓ 90	↓ 98	✘ 116	✘ 107
Club-RTL	MEN 18-54	↓ 77	↓ 89	↓ 87	↓ 97	✘ 122	✘ 108
Plug-RTL	ALL 15-34	↓ 85	↓ 95	↓ 87	↓ 97	✘ 131	✘ 111
La Une	PRP 18-54	↑ 119	↓ 97	↑ 126	↑ 102	✓ 88	⚠ 101
La Deux	PRP 18-54	↑ 117	↓ 70	↑ 124	↓ 74	✘ 105	⚠ 101
AB3	PRP 18-44	↓ 77	↓ 94	↓ 81	↔ 101	⚠ 101	✘ 107
TF1	PRP 18-54	↓ 84	↓ 86	↓ 90	↓ 91	N.A. (Package in 2018)	
TTV	PRP 18-54	↓ 94	↓ 95				
TTV	PRP 18-44	↓ 95	↓ 94				
TTV	ALL 15-34	↓ 98	↓ 97				
TTV	MEN 18-54	↓ 89	↓ 92				

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

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

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

Variable	Channel	Daypart	YTD-16	YTD-17	YTD-18	YTD-19	19 vs 18
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	33,4%	32,5%	31,3%	31,0%	99
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	80,8%	78,1%	75,1%	71,6%	95
	VHS + DVD player + Blu-Ray	"	7,0%	7,0%	6,3%	4,8%	76
	Video on demand + Digital recorder	"	11,4%	14,2%	17,8%	22,3%	125
	Game console and other devices (3)	"	0,9%	0,8%	0,8%	1,3%	175
% Time shift viewing (4)	All Channels	"	13,3%	18,7%	20,3%	21,9%	108
	Main Channels (5)	"	14,4%	20,2%	20,8%	22,7%	109
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	89	88	84	86	
	Main channels (5) - TSV	"	52	52	50	50	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	157	138	126	121	96
	All TV channels (TSV)	"	20	27	26	28	106
	All TV channels (Live + TSV)	"	177	165	152	148	97
	Other TV Screen Usage	"	51	54	59	68	114
	Total TV Screen Usage	"	227	220	212	216	102



Top websites

Key Digital Figures - TOP WEBSITES

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 - Nov-19

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.443.830	11	Le Soir	267.886
2	Nieuwsblad	1.058.562	12	Gazet van Antwerpen	260.235
3	Sudinfo	473.475	13	Immoweb	220.597
4	RTL.be	374.279	14	De Morgen	200.343
5	DH.be	373.369	15	Het Belang van Limburg	187.344
6	VRT	360.559	16	Flair	183.951
7	2dehands.be-2ememain.be	332.351	17	7sur7.be	169.128
8	RTBF.be	329.733	18	L'Avenir.net	160.461
9	De Standaard	310.647	19	Sudpresse Editions Digitales	153.366
10	Sporza	268.889	20	La Libre.be	144.093

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

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

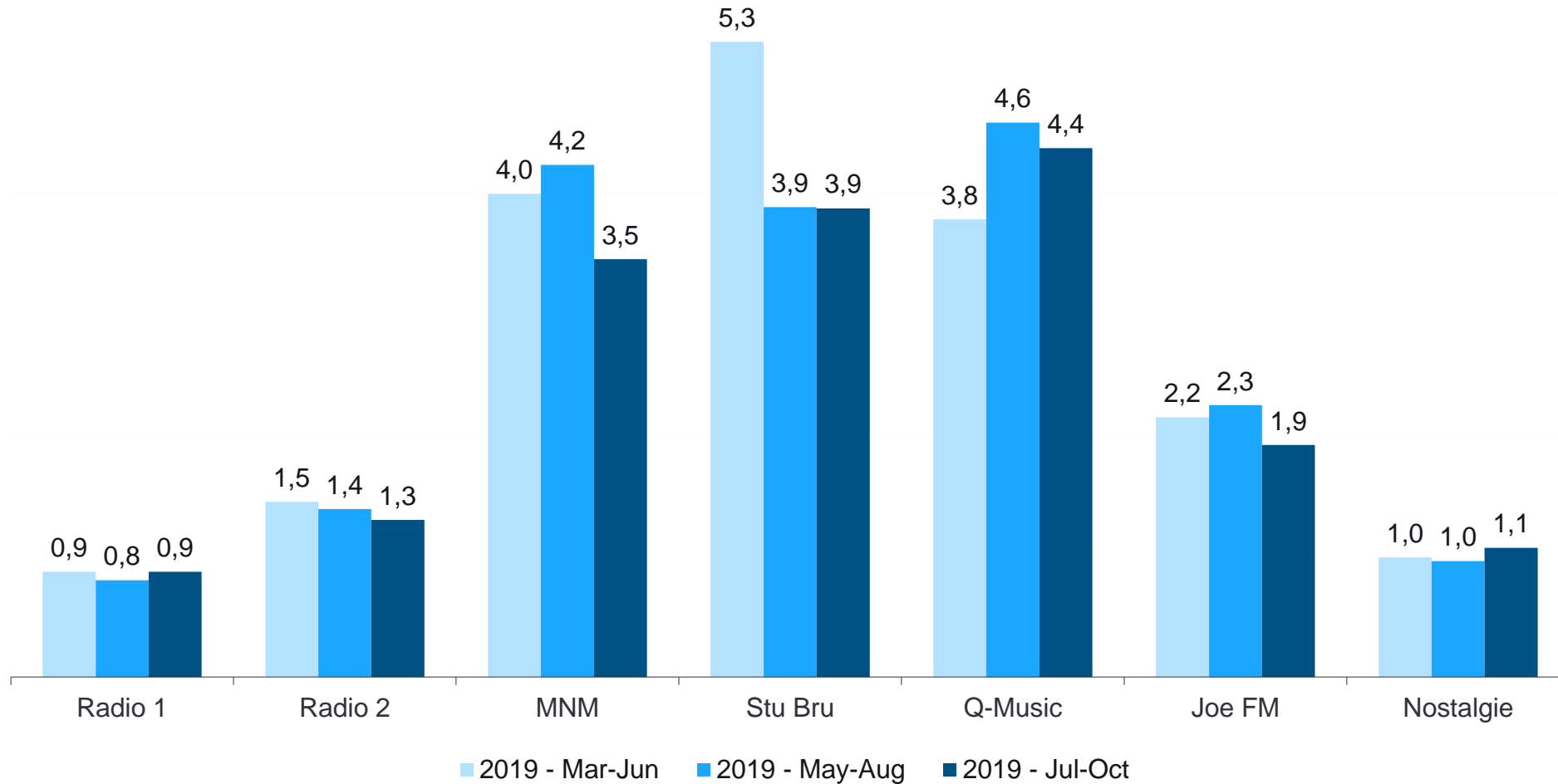
Website	Daily Visitors (000)
MSN.COM	1.022
GOOGLE.BE	1.012
MSN.BE	866
FACEBOOK.COM	657
LINKEDIN.COM	630
LIVE.COM	615
GOOGLE.COM	433
BING.COM	365
YOUTUBE.COM	327
YAHOO.COM	265



Key Radio figures

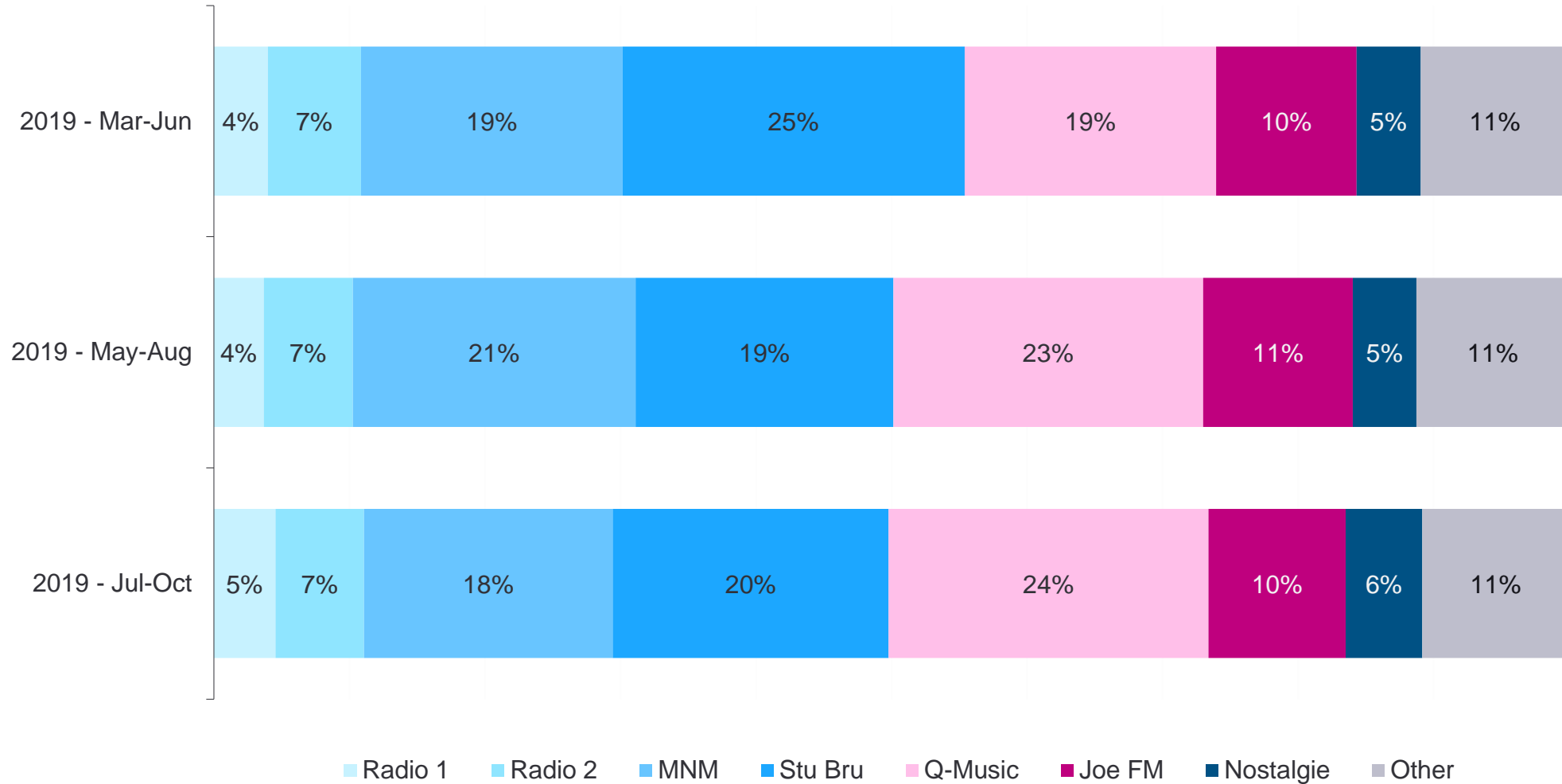
KEY RADIO FIGURES NORTH

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



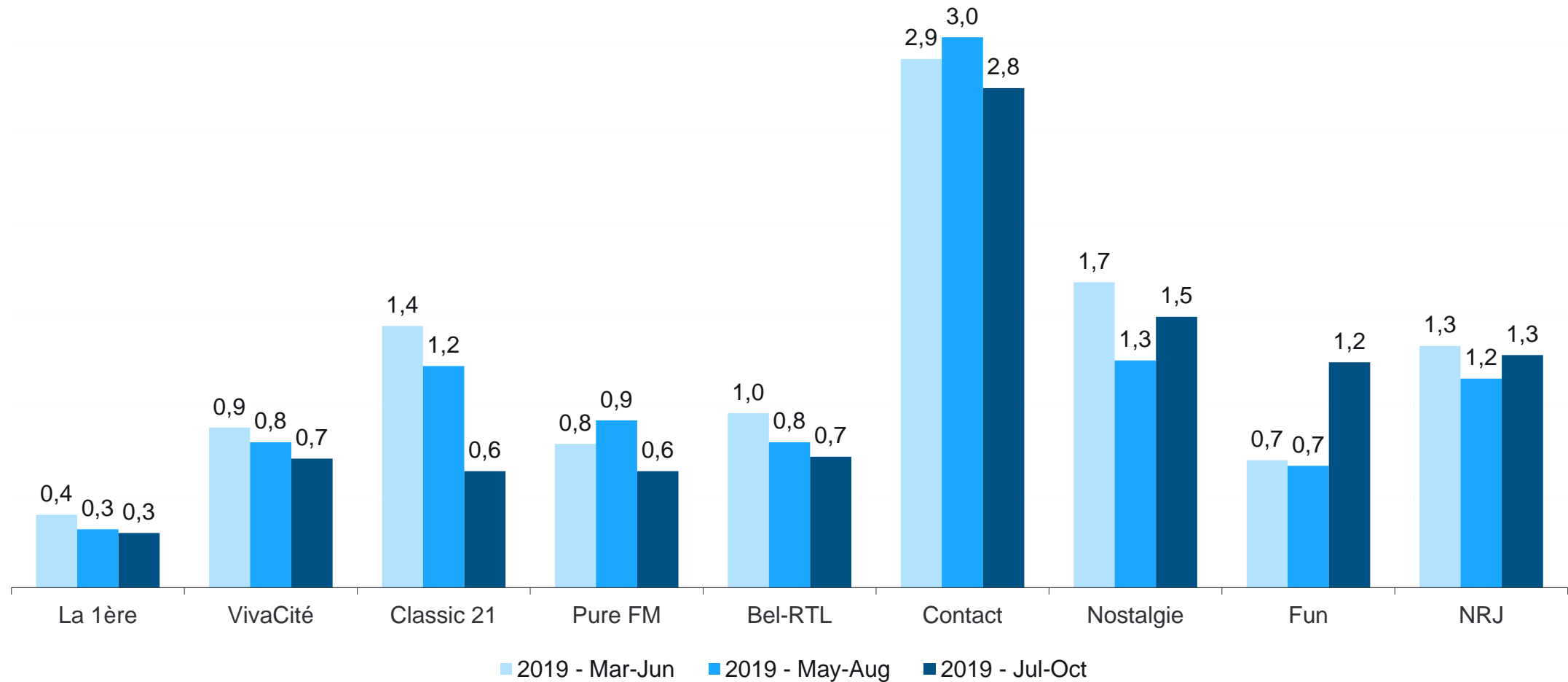
KEY RADIO FIGURES NORTH

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



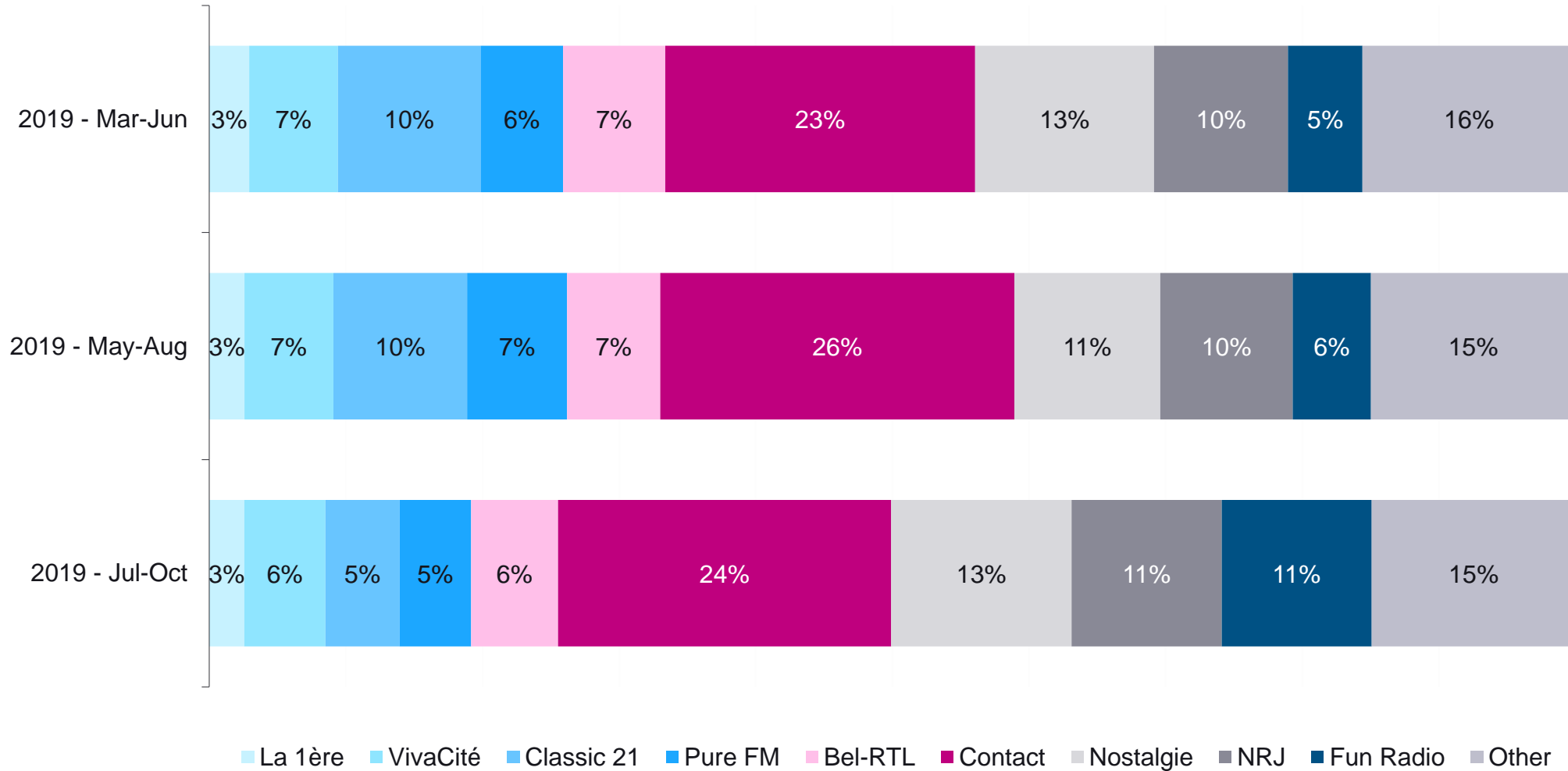
KEY RADIO FIGURES SOUTH

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 2018 (Paid + Free - digital sales included)

NORTH	Circulation (paid+free)	vs 2017	Digital Part	vs 2017
Het Laatste Nieuws	258.474	↓ 99	9%	↑ 150
Het Nieuwsblad	220.949	↓ 97	7%	↑ 138
De Standaard	104.199	↑ 103	26%	↑ 128
Het Belang van Limburg	89.435	↓ 98	8%	↑ 127
Gazet van Antwerpen	81.470	↓ 96	9%	↑ 145
De Morgen	51.883	↓ 98	36%	↑ 115
De Tijd	44.023	↑ 104	43%	↑ 112
Total North *	850.433	↓ 99	14%	↑ 130

SOUTH	Circulation (paid+free)	vs 2017	Digital Part	vs 2017
L'Avenir	77.985	↓ 97	11%	↑ 141
Sud Presse	73.569	↓ 92	10%	↑ 164
Le Soir	57.444	↓ 94	19%	↑ 132
La DH	36.650	↓ 97	13%	↑ 172
La Libre Belgique	35.501	↑ 102	22%	↑ 151
L'Echo	16.367	→ 100	47%	↑ 111
Grenz Echo	9.861	↓ 99	6%	↑ 193
Total South *	307.377	↓ 96	15%	↑ 142

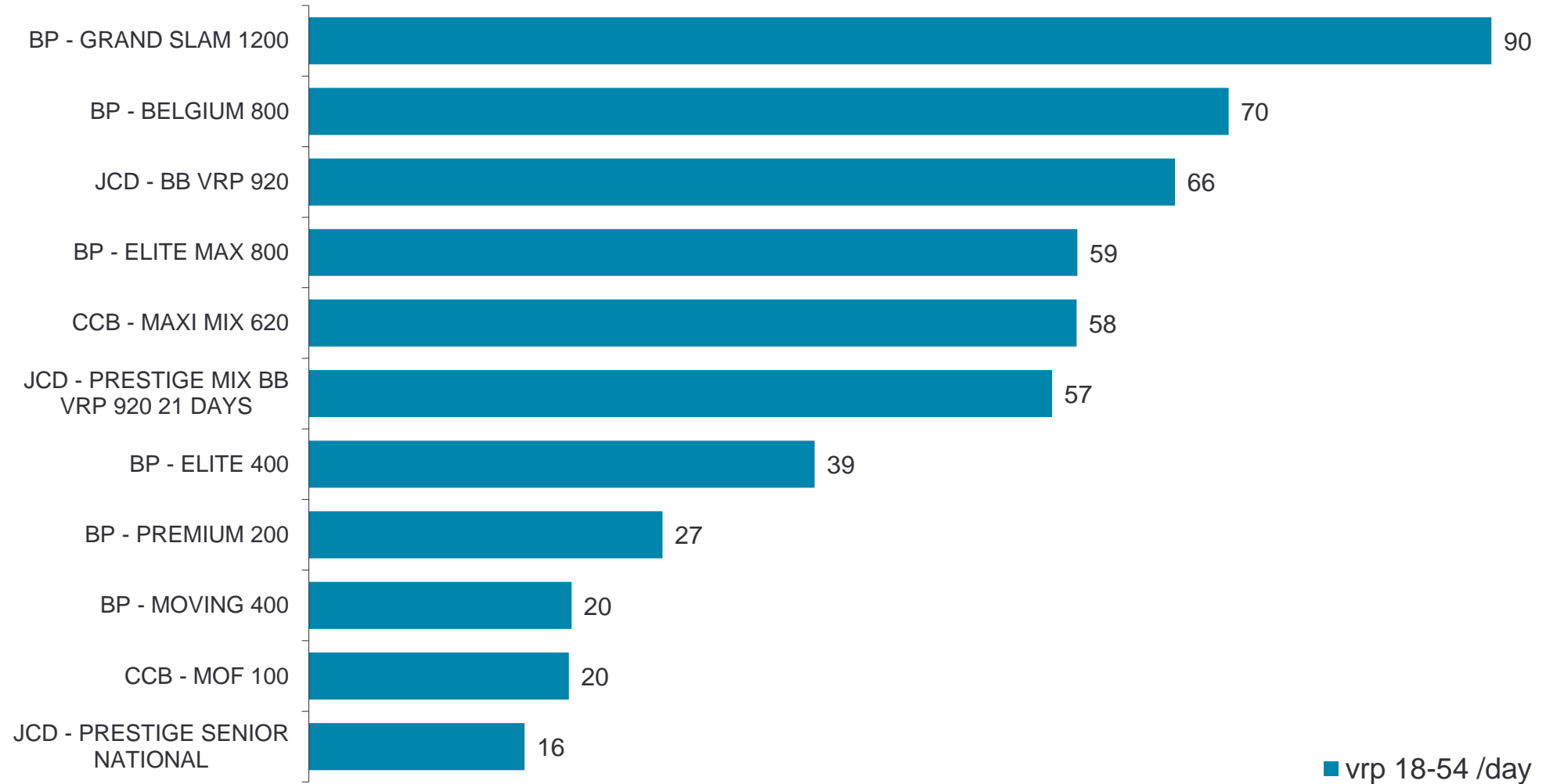
Key Print Figures - Magazines Circulation - Year 2018 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages	
	Circulation	vs 2017	Circulation	vs 2017	Circulation	vs 2017
Television	631.144	↓ 94	400.474	↓ 95		
Women	335.209	↓ 91	166.308	↓ 88		
Business & News	102.555	↓ 86	135.587	↓ 94	58.095	↑ 106
Generation (Youth/Senior)			15.719	↓ 96	122.263	↑ 106
Men	26.074	↓ 92	16.334	↓ 92	43.851	↓ 92
Build & Deco	13.389	↓ 95	14.662	↓ 98	37.983	↓ 85
TOTAL	1.108.371	↓ 92	749.084	↓ 93	262.192	→ 100



Out Of Home Ratings

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



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

