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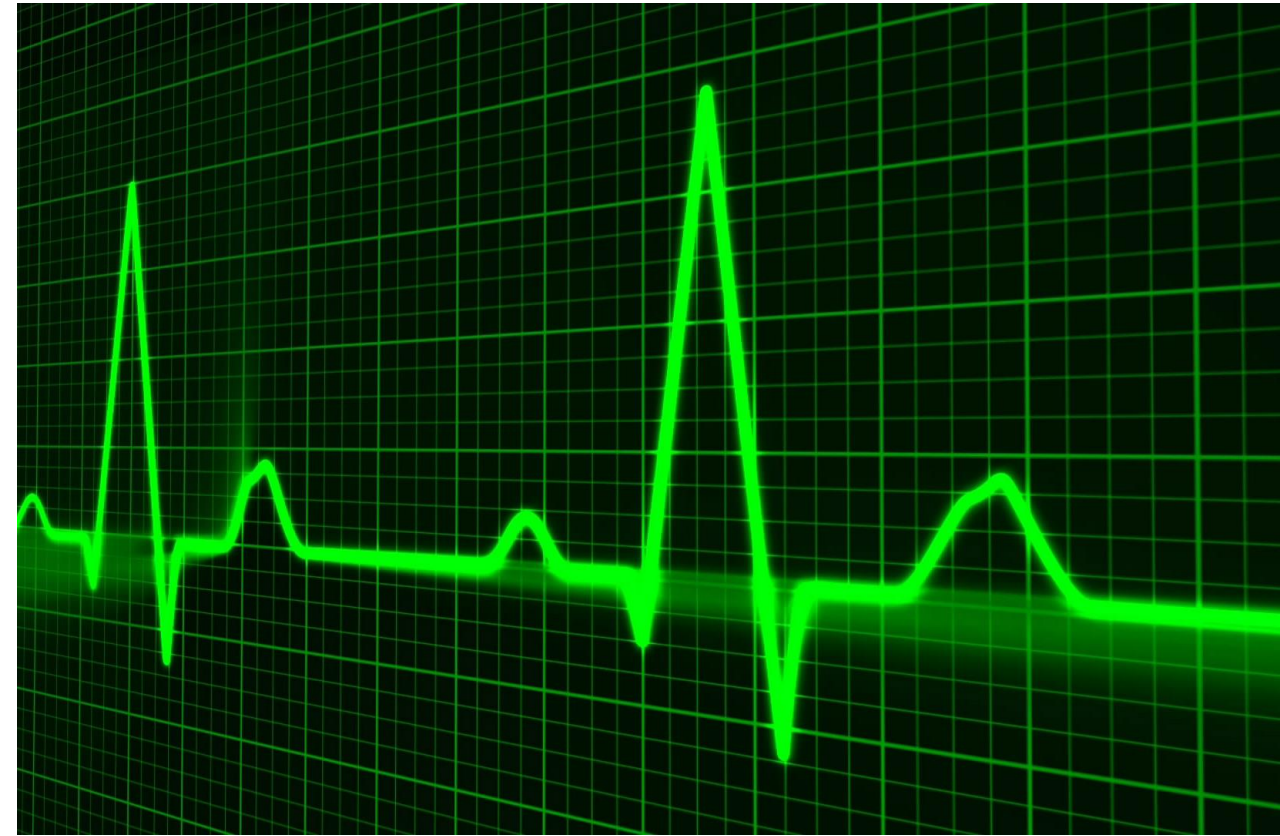
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

September 2018



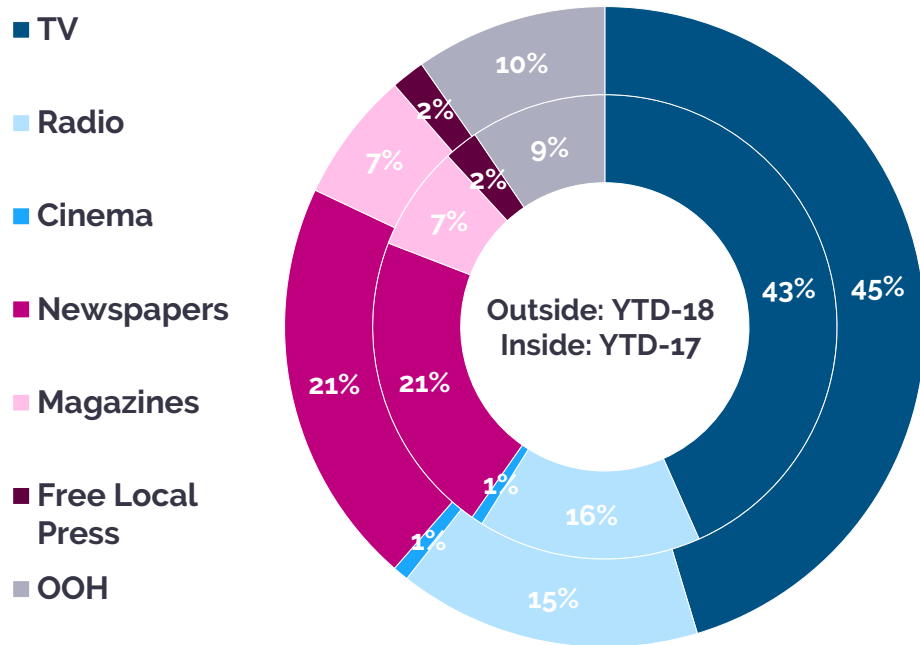
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Aug 2018

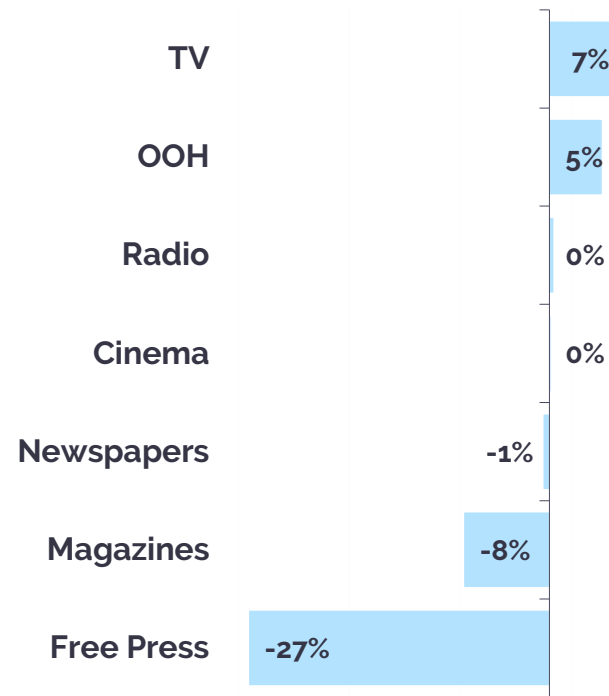
NB : Internet 2018 (declarative) figures are not published yet => internet is not included here !

Market	National	North	South
<ul style="list-style-type: none"> ▪ € Mo ▪ vs YTD-17 * ▪ % Region 	<ul style="list-style-type: none"> ▪ 2.252 ▪ + 2,2% ▪ 100% 	<ul style="list-style-type: none"> ▪ 1.333 ▪ + 0,7% ▪ 59% 	<ul style="list-style-type: none"> ▪ 918 ▪ + 4,3% ▪ 41%

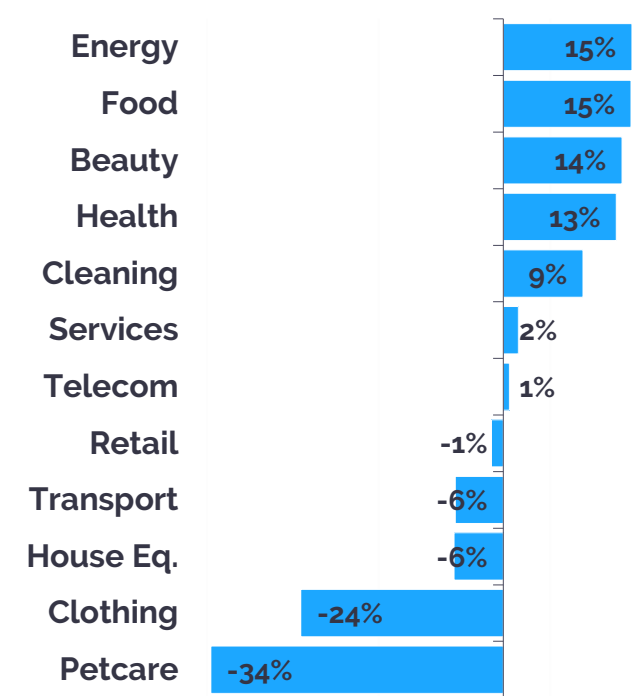
Media Mix Evol.



Media Evol. (vs YTD-17)



EcoGroups Evol. (vs YTD-17)



MDB TOP 30 ADVERTISERS - Jan-Aug 2018

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

Rank	ADV.GROUP	Gross Inv.	vs YTD-17
1	PROCTER & GAMBLE	76,78	↑ 114
2	COCA-COLA COMPANY	58,35	↑ 160
3	D'IETEREN GROUP	44,82	↓ 95
4	UNILEVER	37,82	↑ 113
5	RECKITT & BENCKISER	37,66	↓ 93
6	PROXIMUS GROUP	36,58	↑ 121
7	PSA GROUPE	35,20	↑ 138
8	COLRUYT GROUP	25,67	↑ 110
9	RENAULT-NISSAN ALLIANCE	23,39	↓ 97
10	TELENET GROUP HOLDING	22,52	↑ 107
11	ORANGE	21,92	↓ 92
12	ANHEUSER BUSCH INBEV	20,11	↑ 202
13	MONDELEZ INTERNATIONAL	19,12	↓ 91
14	L'OREAL GROUP	17,68	↑ 119
15	DANONE GROUP	17,14	↓ 97

Rank	ADV.GROUP	Gross Inv.	vs YTD-17
16	FIAT CHRYSLER AUTOMOBILES	16,6	↓ 90
17	BEIERSDORF	15,8	↑ 115
18	AHOLD DELHAIZE	15,4	↑ 110
19	FERRERO	15,2	↑ 148
20	THE WALT DISNEY COMPANY	14,6	↑ 127
21	DAIMLER BENZ GROUP	14,5	↓ 97
22	LOTERIE NATIONALE	14,5	↑ 117
23	NETHYS	12,4	↓ 89
24	BNP-PARIBAS	12,3	↑ 108
25	FORD MOTOR COMPANY	11,9	↑ 105
26	ALDI	11,9	↑ 1120
27	GLAXOSMITHKLINE	11,7	↓ 75
28	JAGUAR LAND ROVER BELUX	11,7	↑ 154
29	BELFIUS	11,6	↑ 126
30	ING GROUP	11,3	↑ 103



Key TV figures

Key TV figures North - Sep-18

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Sep-18	YTD	Sep-18	YTD	Sep-18	YTD
VTM	PRP 18-54	7,1	6,3	27,0	24,0	1.305	929
Q2	PRP 18-44	1,6	1,9	6,9	8,1	1.296	871
VITAYA	PRP 18-54	1,2	1,2	4,6	4,7	899	807
CAZ	MEN 18-54	0,4	0,5	1,9	2,2	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	3,7	2,7	14,0	10,2	1.113	993
VIJF	PRP 18-54	1,7	1,6	6,4	6,2	815	741
ZES	PRP 18-54	0,6	0,6	2,2	2,4	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	26,2	26,2				
Total TV	PRP 18-44	23,5	23,4				
Total TV	MEN 18-54	21,2	22,0				

Key TV indexes North - Sep-18

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-18	YTD	Sep-18	YTD	Sep-18	YTD
VTM	PRP 18-54	↓ 92	↓ 93	↓ 96	↓ 94	✘ 123	✘ 108
Q2	PRP 18-44	↓ 70	↓ 92	↓ 73	↓ 93	✘ 131	✘ 109
VITAYA	PRP 18-54	↑ 103	↗ 101	↑ 107	↑ 103	✘ 102	✘ 114
CAZ	MEN 18-54	↓ 85	→ 100	↓ 92	↗ 101	Package	Package
VIER	PRP 18-54	↑ 105	↓ 95	↑ 109	↓ 96	! 101	✘ 111
VIJF	PRP 18-54	↑ 118	↑ 108	↑ 123	↑ 110	✓ 90	! 101
ZES	PRP 18-54	↑ 116	↑ 132	↑ 120	↑ 135	Package	Package
Total TV	PRP 18-54	↓ 96	↓ 98				
Total TV	PRP 18-44	↓ 96	↘ 99				
Total TV	MEN 18-54	↓ 92	↓ 98				

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-15	YTD-16	YTD-17	YTD-18	18 vs 17
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	27,6%	27,3%	27,8%	27,5%	99
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	87,5%	85,5%	85,4%	83,0%	97
	VHS + DVD player + Blue Ray	"	3,8%	4,4%	4,1%	3,6%	87
	Video on demand + Digital recorder	"	7,0%	8,9%	9,2%	11,9%	129
	Game console and other devices (3)	"	0,8%	1,3%	1,3%	1,6%	119
% Time shift viewing (4)	All Channels	"	12,3%	16,3%	23,4%	25,3%	108
	Main Channels (5)	"	15,0%	20,6%	26,2%	29,9%	114
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	85	87	86	
	Main channels (5) - TSV	"	28	28	30	34	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	123	112	106	101	96
	All TV channels (TSV)	"	14	19	28	29	105
	All TV channels (Live + TSV)	"	137	131	133	130	98
	Other TV Screen Usage	"	27	29	30	35	116
	Total TV Screen Usage	"	164	160	164	165	101

Key TV figures South - Sep-18

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Sep-18	YTD	Sep-18	YTD	Sep-18	YTD
RTL-TV1	PRP 18-54	6,4	6,8	25,5	25,7	1.020	813
Club-RTL	MEN 18-54	1,5	1,4	7,7	6,8	768	850
Plug-RTL	ALL 15-34	0,6	0,6	4,1	4,0	959	907
La Une	PRP 18-54	3,5	3,8	14,1	14,2	867	709
La Deux	PRP 18-54	1,4	2,1	5,5	7,8	836	652
AB3	PRP 18-44	2,7	2,3	12,6	9,8	610	621
TF1	PRP 18-54	3,1	3,4	12,2	12,6	Package	Package
TTV	PRP 18-54	25,1	26,7				
TTV	PRP 18-44	21,8	22,9				
TTV	ALL 15-34	13,4	14,9				
TTV	MEN 18-54	19,5	21,0				

Key TV indexes South - Sep-18

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-18	YTD	Sep-18	YTD	Sep-18	YTD
RTL-TV1	PRP 18-54	↓ 91	↓ 91	↑ 103	↓ 97	✗ 122	✗ 115
Club-RTL	MEN 18-54	↓ 90	↘ 99	→ 100	↑ 102	✓ 93	✗ 113
Plug-RTL	ALL 15-34	↓ 45	↓ 70	↓ 56	↓ 77	✗ 117	✗ 129
La Une	PRP 18-54	↓ 97	↘ 99	↑ 110	↑ 106	✗ 109	✗ 110
La Deux	PRP 18-54	↓ 91	↑ 136	↑ 103	↑ 145	✗ 117	✗ 114
AB3	PRP 18-44	↑ 116	→ 100	↑ 131	↑ 107	✓ 83	✗ 107
TF1	PRP 18-54	↓ 72	↓ 79	↓ 81	↓ 83	Package	Package
TTV	PRP 18-54	↓ 89	↓ 94				
TTV	PRP 18-44	↓ 88	↓ 94				
TTV	ALL 15-34	↓ 79	↓ 90				
TTV	MEN 18-54	↓ 90	↓ 97				

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-15	YTD-16	YTD-17	YTD-18	18 vs 17
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	31,8%	32,8%	31,9%	31,0%	97
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	81,0%	81,0%	78,0%	75,2%	96
	VHS + DVD player + Blue Ray	"	7,9%	6,9%	7,3%	6,6%	90
	Video on demand + Digital recorder	"	8,8%	11,3%	14,0%	17,5%	125
	Game console and other devices (3)	"	1,2%	0,9%	0,7%	0,7%	101
% Time shift viewing (4)	All Channels	"	8,5%	12,8%	18,1%	20,3%	112
	Main Channels (5)	"	9,4%	13,8%	19,8%	20,9%	106
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	89	88	88	83	
	Main channels (5) - TSV	"	47	52	53	51	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	157	156	137	125	91
	All TV channels (TSV)	"	12	19	26	26	99
	All TV channels (Live + TSV)	"	169	175	163	151	92
	Other TV Screen Usage	"	48	50	54	58	109
	Total TV Screen Usage	"	217	224	217	209	97



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 - Sep-18

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.143.121	11	RTL.be	227.531
2	Nieuwsblad	949.203	12	Immoweb	213.598
3	2dehands.be-2ememain.be	558.518	13	Le Soir	206.375
4	Sporza	316.428	14	Het Belang van Limburg	179.582
5	De Standaard	315.695	15	Knack-Le Vif	158.826
6	VRT	303.165	16	De Morgen	156.613
7	Sudinfo	293.650	17	VTM	132.123
8	RTBF.be	270.428	18	7sur7.be	127.016
9	Gazet van Antwerpen	248.903	19	La Libre.be	123.507
10	DH.be	245.276	20	L'Avenir.net	122.869

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

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

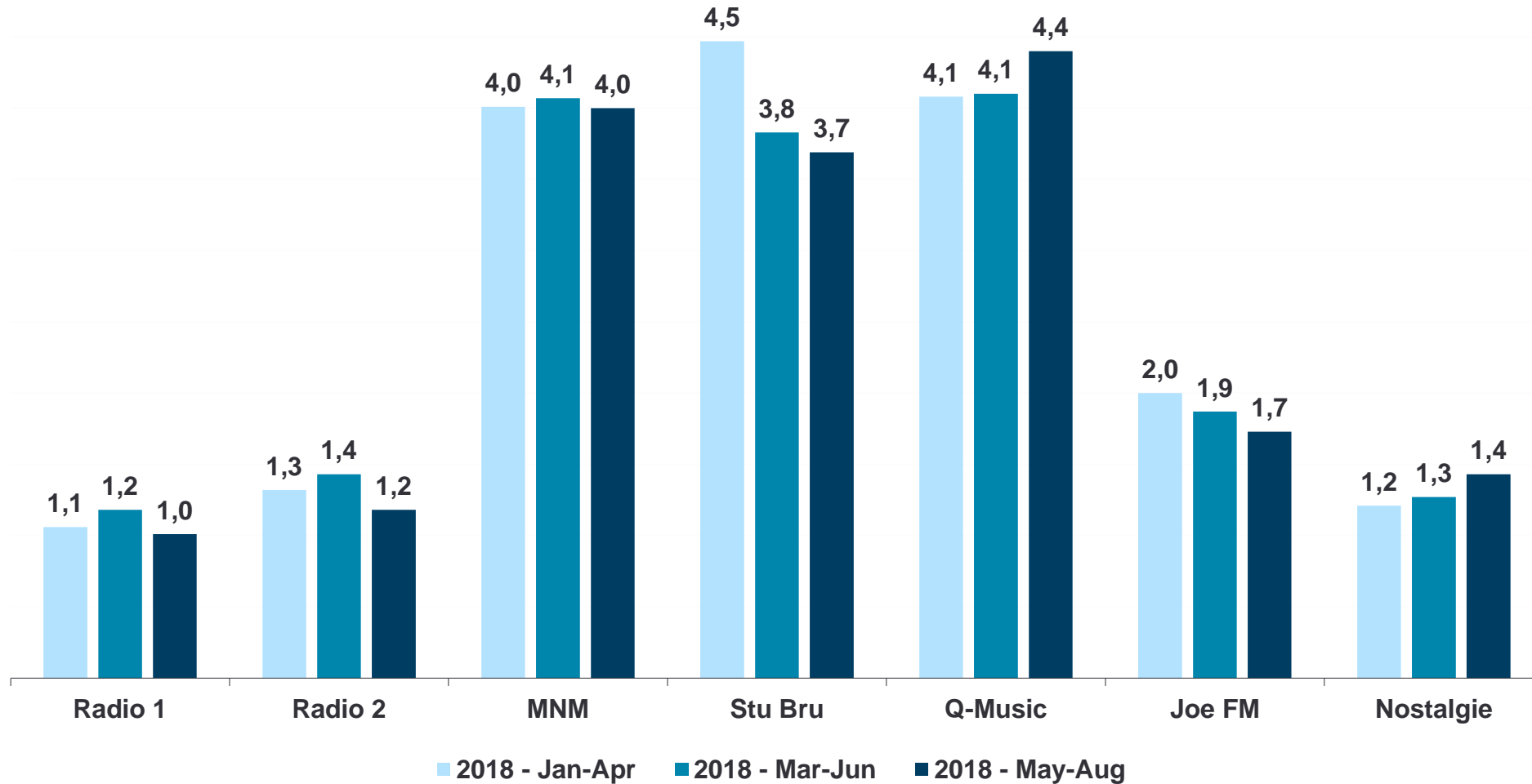
Website	Daily Visitors (000)
MSN.COM	1.022
GOOGLE.BE	1.012
MSN.BE	866
FACEBOOK.COM	657
LINKEDIN.COM	630
LIVE.COM	615
GOOGLE.COM	433
BING.COM	365
YOUTUBE.COM	327
YAHOO.COM	265



Key Radio figures

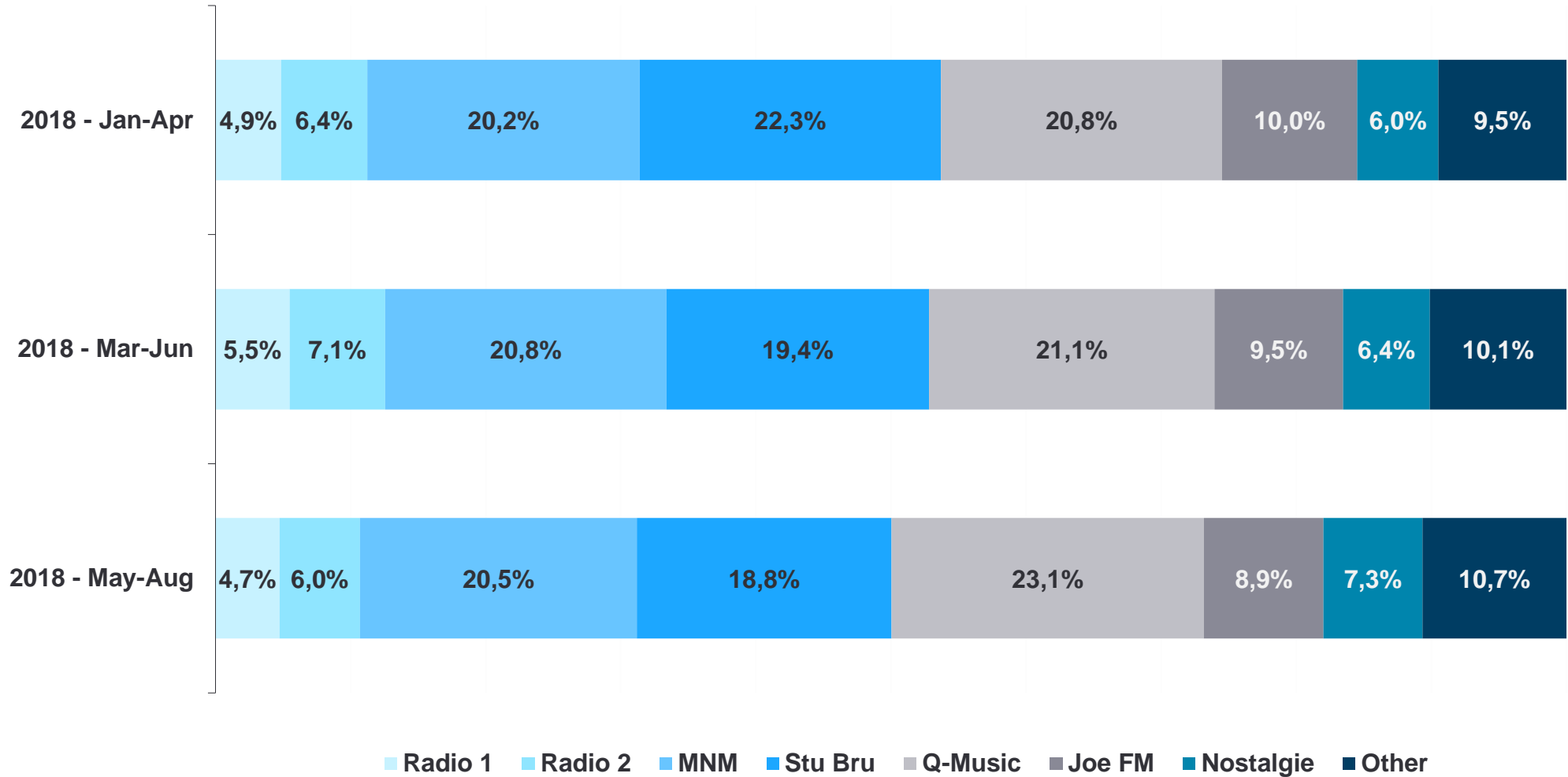
KEY RADIO FIGURES NORTH

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



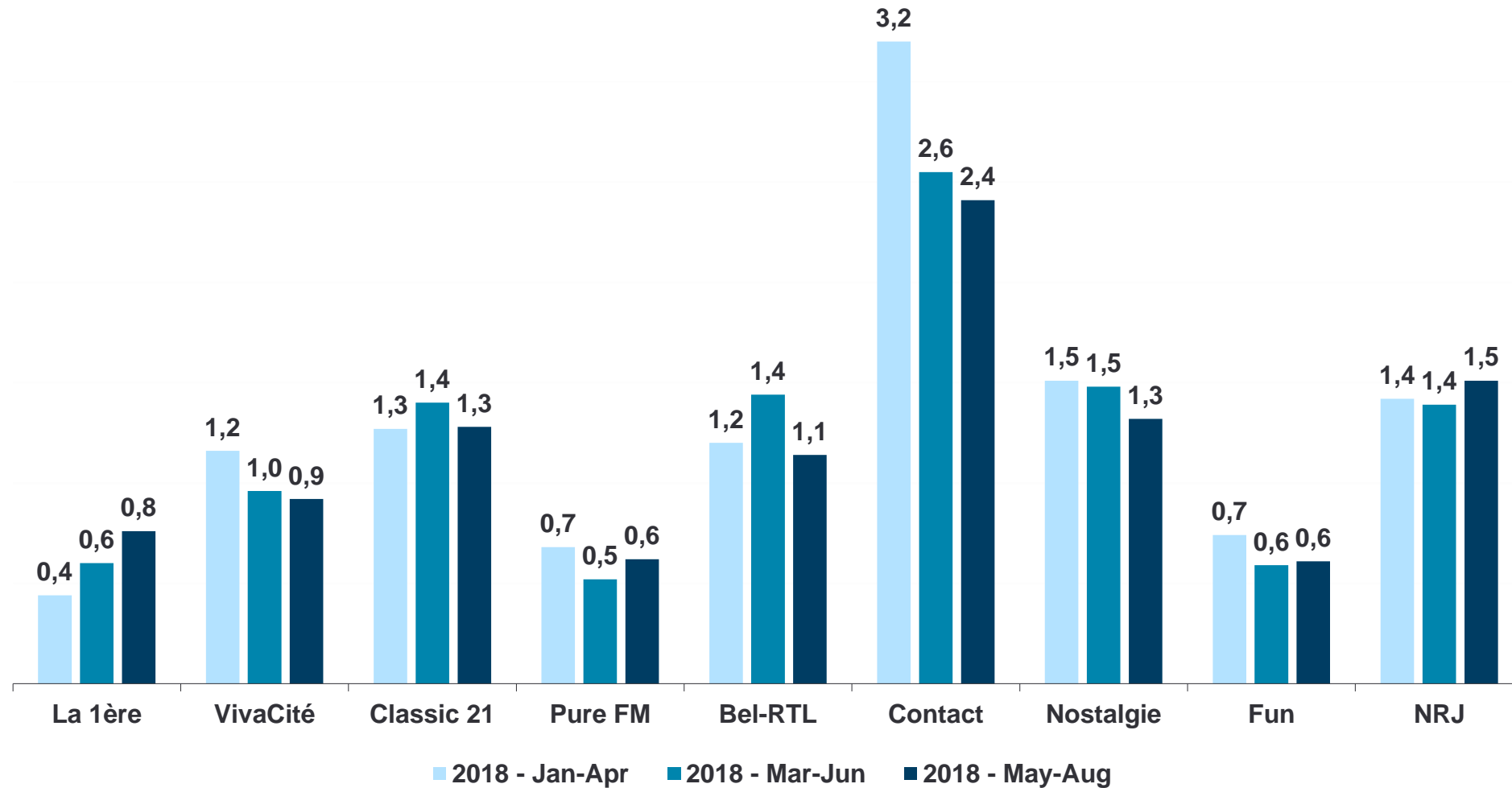
KEY RADIO FIGURES NORTH

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



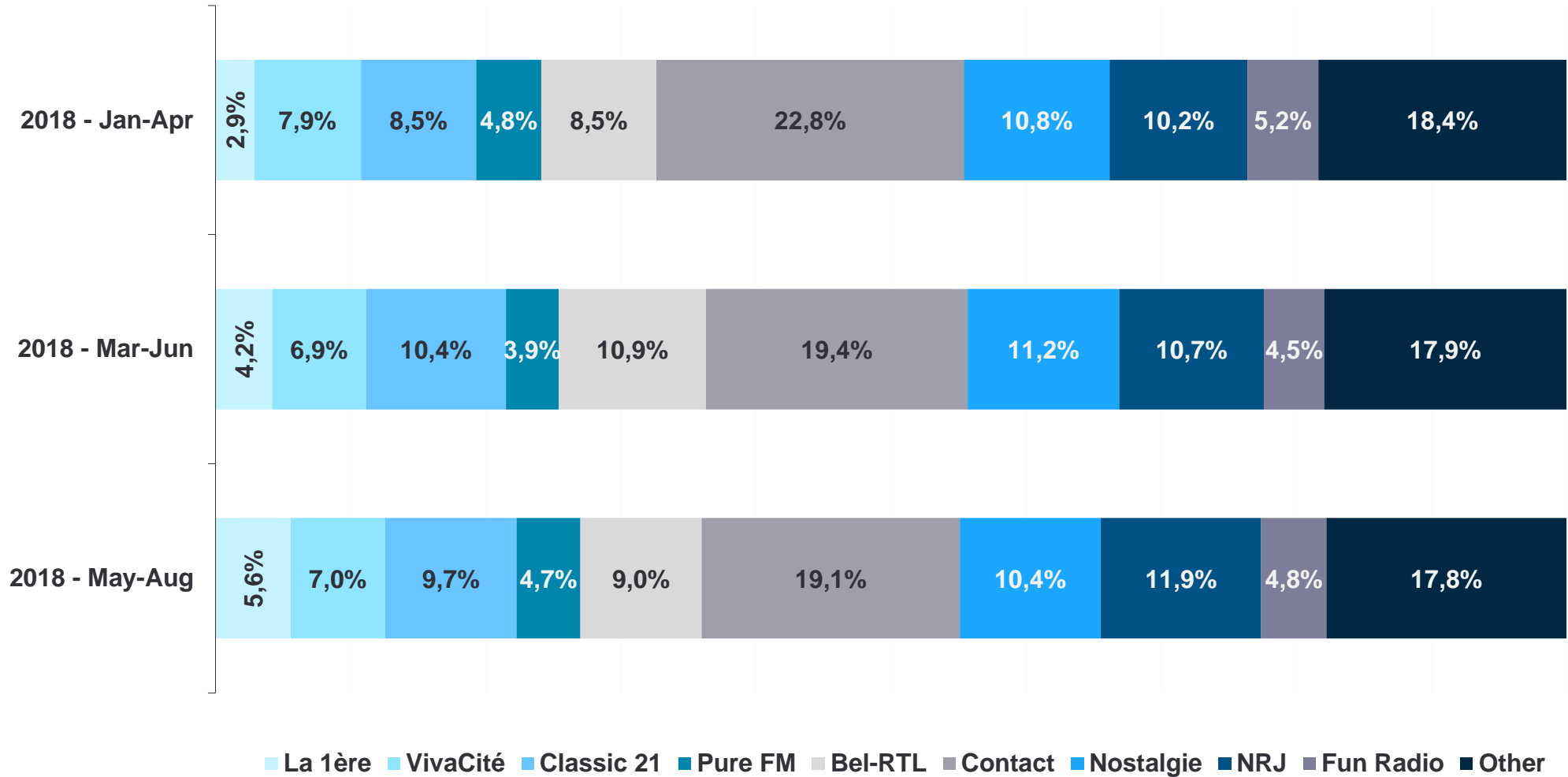
KEY RADIO FIGURES SOUTH

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 2017

(Paid + Free - digital sales included)

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%

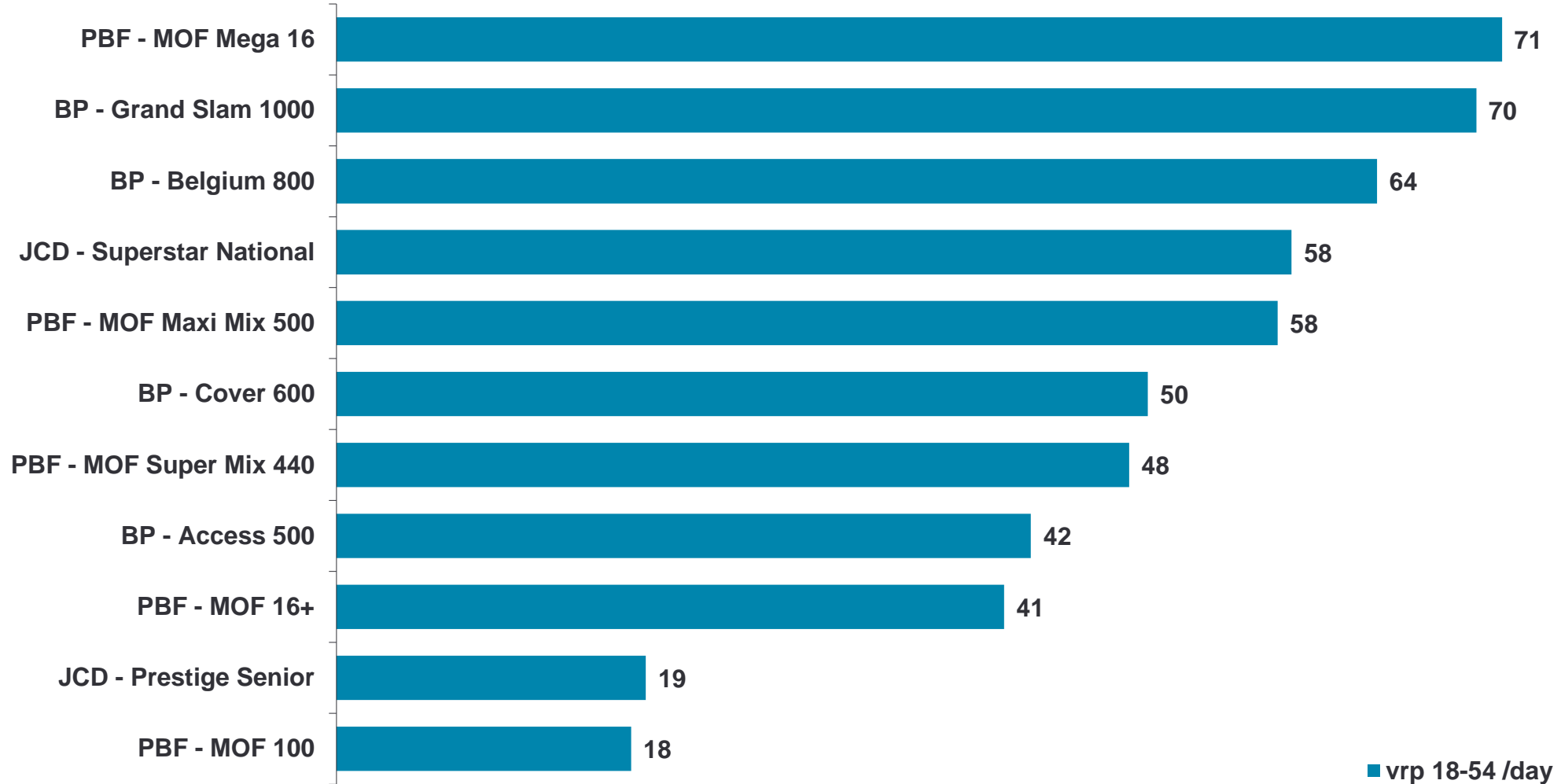
Key Print Figures - Magazines Circulation - Year 2017 (Paid + Free - digital sales included)

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



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

