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CONNECTIONS AGENCY

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Gross Media Investments Evolution

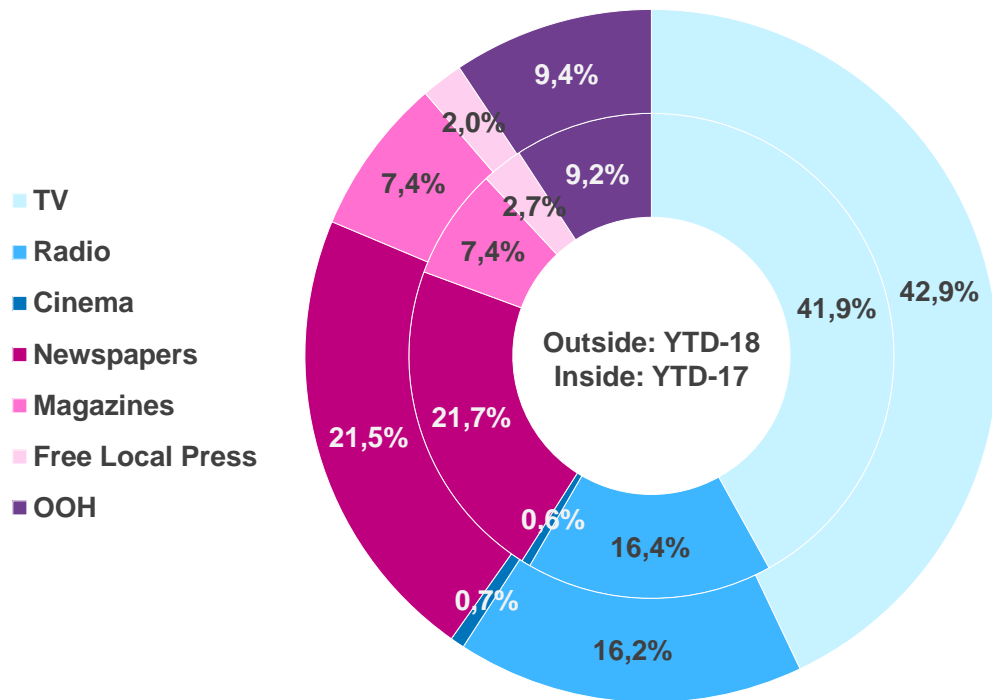
GROSS MEDIA INVESTMENTS EVOLUTION

Jan-Mar 2018

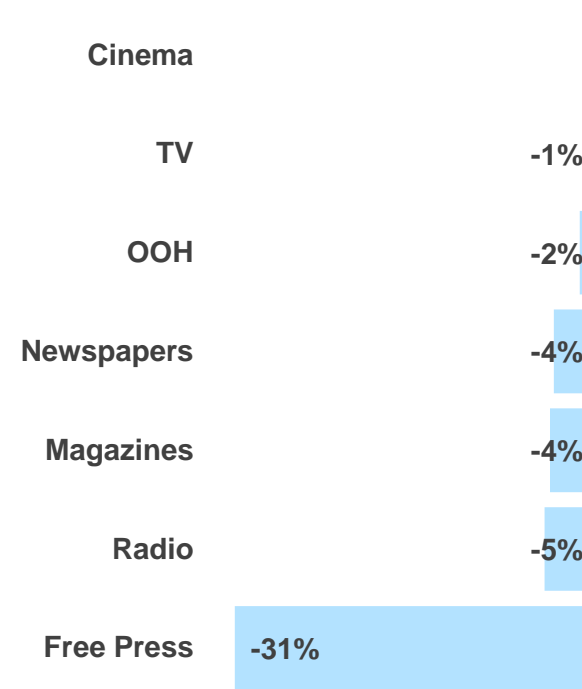
Source: MDB / Nielsen

Market	National	North	South
<ul style="list-style-type: none"> • € Mo • vs YTD-17 * • % Region 	<ul style="list-style-type: none"> • 826,7,0 • - 3,2% • 100% 	<ul style="list-style-type: none"> • 483,0 • - 3,7% • 58% 	<ul style="list-style-type: none"> • 343,7 • - 2,5% • 42%

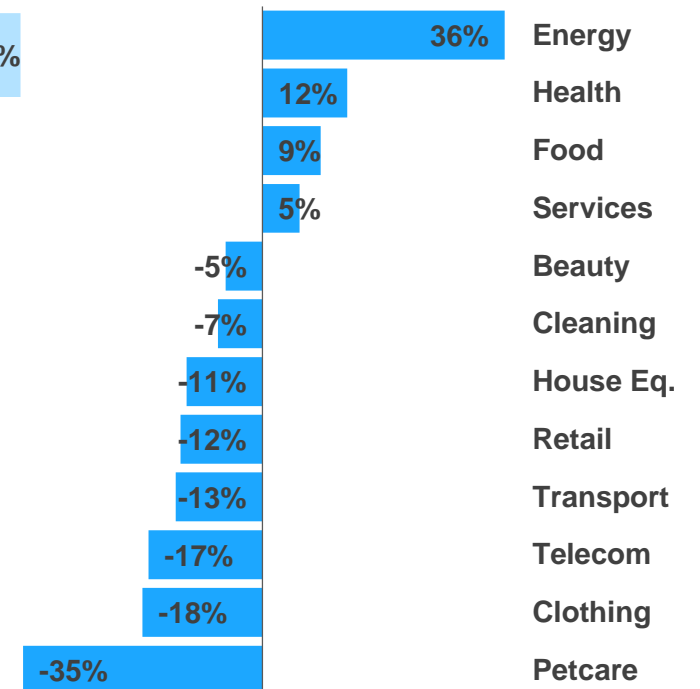
Media Mix Evol.



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-Mar 2018

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

Rank	ADV.GROUP	Gross Inv.	vs YTD-17	Rank	ADV.GROUP	Gross Inv.	vs YTD-17
1	D'IETEREN GROUP	25,23	↓ 88	16	ORANGE	6,1	↓ 54
2	PROCTER & GAMBLE	25,19	↑ 105	17	DANONE GROUP	6,0	↑ 110
3	PROXIMUS GROUP	13,7	↑ 135	18	BEIERSDORF	5,9	↑ 125
4	PSA PEUGEOT CITROEN	12,0	↓ 93	19	FERRERO	5,5	↑ 111
5	RECKITT & BENCKISER	11,8	↓ 61	20	THE WALT DISNEY COMPANY	5,3	↑ 153
6	COCA-COLA COMPANY	10,9	↑ 183	21	ANHEUSER BUSCH INBEV	5,2	↑ 261
7	RENAULT-NISSAN ALLIANCE	10,8	↓ 95	22	AHOLD DELHAIZE	4,9	↑ 112
8	UNILEVER	9,1	↓ 97	23	GLAXOSMITHKLINE	4,7	↓ 94
9	COLRUYT GROUP	8,2	↑ 111	24	ING GROUP	4,4	↓ 90
10	TELENET GROUP	7,9	↓ 86	25	JAGUAR LAND ROVER BELUX	4,4	↑ 152
11	MONDELEZ INTERNATIONAL	7,7	↑ 108	26	AXA GROUP	4,3	↑ 184
12	BELFIUS	7,4	↑ 166	27	HELLOFRESH	4,1	↑ 341
13	FIAT CHRYSLER AUTOMOBILES	7,0	↑ 107	28	GENERAL MOTORS CORP.	4,1	↑ 114
14	FORD MOTOR COMPANY	6,7	↑ 118	29	BMW GROUP BELGIUM	4,0	↓ 46
15	L'OREAL GROUP	6,6	↑ 116	30	NETHYS	4,0	↓ 79

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



Key TV Figures

Key TV figures North - Apr-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 (€ - <u>no</u> commission) Total Day	
		Apr-18	YTD	Apr-18	YTD	Apr-18	YTD
VTM	PRP 18-54	6,8	7,7	25,1	25,6	1.062	775
Q2	PRP 18-44	2,2	2,2	8,8	8,1	1.012	738
VITAYA	PRP 18-54	1,2	1,3	4,6	4,3	780	764
VIER	PRP 18-54	3,6	3,1	13,1	10,3	1.171	933
VIJF	PRP 18-54	2,1	2,0	7,6	6,7	890	669
Total TV	PRP 18-54	27,1	30,0				
Total TV	PRP 18-44	24,6	26,8				

Key TV indexes North - Apr-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Apr-18 vs P-1	YTD	Apr-18 vs P-1	YTD	Apr-18 vs Channel's Objective	YTD
VTM	PRP 18-54	↓ 98	↑ 103	↓ 98	↔ 101	× 104	✓ 97
Q2	PRP 18-44	↑ 106	↑ 102	↔ 101	↓ 98	× 106	✓ 99
VITAYA	PRP 18-54	↑ 103	↓ 94	↑ 103	↓ 93	✓ 93	× 116
VIER	PRP 18-54	↑ 122	↔ 100	↑ 121	↓ 98	× 111	× 109
VIJF	PRP 18-54	↑ 146	↑ 123	↑ 146	↑ 121	× 102	✓ 95
Total TV	PRP 18-54	↔ 101	↑ 102				
Total TV	PRP 18-44	↑ 105	↑ 104				

Time Shift Viewing & Other TV Screen Usage Evolution

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

Source: CIM TV - Live +6 including guests (2014-2015) / 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	31,1%	30,5%	30,8%	31,1%	101
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	87,8%	85,6%	86,3%	84,1%	97
	VHS + DVD player + Blue Ray	"	3,6%	4,7%	4,0%	3,5%	87
	Video on demand + Digital recorder	"	7,6%	8,3%	8,5%	11,0%	129
	Game console and other devices (3)	"	1,1%	1,4%	1,2%	1,5%	120
% Time shift viewing (4)	All Channels	"	12,1%	16,0%	25,1%	26,5%	106
	Main Channels (5)	"	14,7%	19,9%	28,2%	30,2%	107
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	89	87	87	87	
	Main channels (5) - TSV	"	24	27	30	34	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	137	125	114	112	98
	All TV channels (TSV)	"	15	20	32	34	105
	All TV channels (Live + TSV)	"	152	145	146	146	100
	Other TV Screen Usage	"	29	32	31	36	117
	Total TV Screen Usage	"	181	177	177	182	103

(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

Key TV figures South - Apr-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 (€ - <u>with</u> comm.) Total Day	
		Apr-18	YTD	Apr-18	YTD	Apr-18	YTD
RTL-TVI	PRP 18-54	7,2	8,2	27,7	27,5	1.031	782
Club-RTL	MEN 18-54	1,6	1,6	7,9	7,2	1.203	894
Plug-RTL	ALL 15-34	0,6	0,8	4,2	4,5	1.120	911
La Une	PRP 18-54	3,4	3,8	13,0	12,7	900	759
La Deux	PRP 18-54	1,5	1,6	5,6	5,3	733	681
AB3	PRP 18-44	2,4	2,6	10,9	10,0	896	623
TF1	PRP 18-54	3,4	4,2	13,0	14,2	778	594
TTV	PRP 18-54	26,0	29,9				
TTV	PRP 18-44	21,9	25,7				
TTV	ALL 15-34	14,2	17,1				
TTV	MEN 18-54	19,9	22,9				

Key TV indexes South - Apr-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Apr-18 vs P-1	YTD	Apr-18 vs P-1	YTD	Apr-18 vs Channel's Objective	YTD
RTL-TVI	PRP 18-54	↓ 97	↓ 97	↑ 109	↔ 101	✗ 113	✗ 102
Club-RTL	MEN 18-54	↔ 99	↑ 112	↑ 114	↑ 116	✗ 124	✗ 108
Plug-RTL	ALL 15-34	↓ 69	↓ 82	↓ 83	↓ 88	✗ 126	✗ 118
La Une	PRP 18-54	↓ 90	↓ 90	↑ 102	↓ 93	✗ 113	✗ 109
La Deux	PRP 18-54	↓ 92	↔ 101	↑ 104	↑ 105	✗ 104	✗ 111
AB3	PRP 18-44	↑ 102	↓ 98	↑ 118	↑ 103	✗ 122	✓ 97
TF1	PRP 18-54	↓ 68	↓ 88	↓ 77	↓ 92	-	-
TTV	PRP 18-54	↓ 89	↓ 96				
TTV	PRP 18-44	↓ 86	↓ 95				
TTV	ALL 15-34	↓ 83	↓ 93				
TTV	MEN 18-54	↓ 87	↓ 96				

Time Shift Viewing & Other TV Screen Usage Evolution

Market: SOUTH - Period: Jan-Apr - Targetgroup: ALL 18-54

Source: CIM TV - Live +6 including guests (2014-2015) / 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	34,6%	35,5%	35,0%	34,1%	98
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	81,7%	81,6%	78,7%	76,1%	97
	VHS + DVD player + Blue Ray	"	7,2%	6,9%	7,3%	6,7%	91
	Video on demand + Digital recorder	"	9,8%	10,8%	13,3%	16,4%	124
	Game console and other devices (3)	"	1,3%	0,7%	0,7%	0,8%	114
% Time shift viewing (4)	All Channels	"	7,7%	12,9%	17,9%	21,7%	121
	Main Channels (5)	"	8,4%	14,0%	19,6%	23,0%	117
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	90	90	89	87	
	Main channels (5) - TSV	"	43	51	50	50	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	171	166	151	137	91
	All TV channels (TSV)	"	12	21	28	30	108
	All TV channels (Live + TSV)	"	183	187	179	167	94
	Other TV Screen Usage	"	50	52	56	61	109
	Total TV Screen Usage	"	232	238	235	228	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 - Apr-18

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

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.157.251	11	DH.be	251.466
2	Nieuwsblad	1.031.774	12	Immoweb	227.324
3	2dehands.be-2ememain.be	571.234	13	Le Soir	211.425
4	De Standaard	331.211	14	Het Belang van Limburg	196.112
5	VRT	309.633	15	Knack-LeVif	183.219
6	Sudinfo	286.739	16	VTM	170.664
7	Gazet van Antwerpen	273.192	17	De Morgen	148.720
8	Sporza	269.126	18	7sur7.be	138.940
9	RTBF.be	262.619	19	La Libre.be	132.459
10	RTL.be	259.821	20	L'Avenir.net	128.972

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

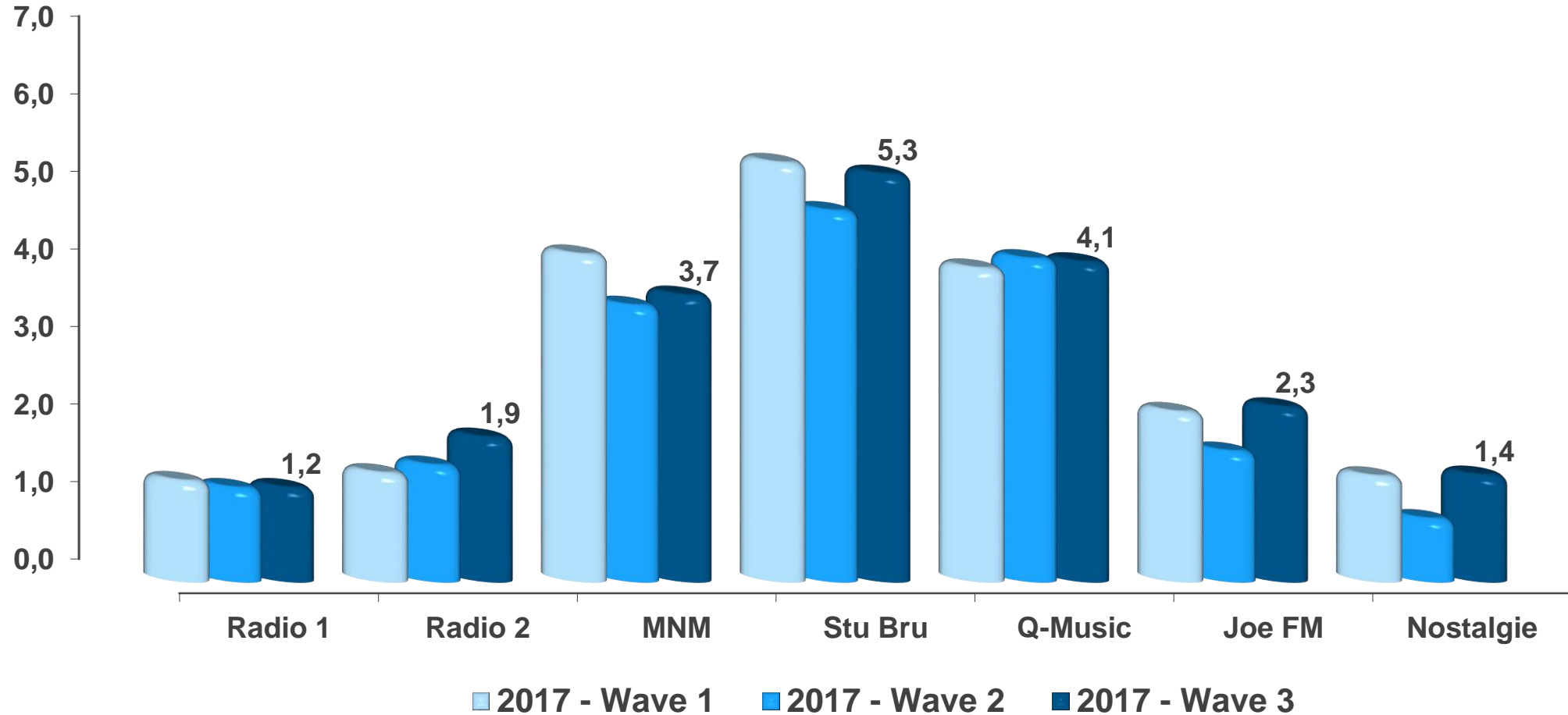
NB: Comscore stopped measuring the Belgian market on December 31, 2017



Key Radio Figures

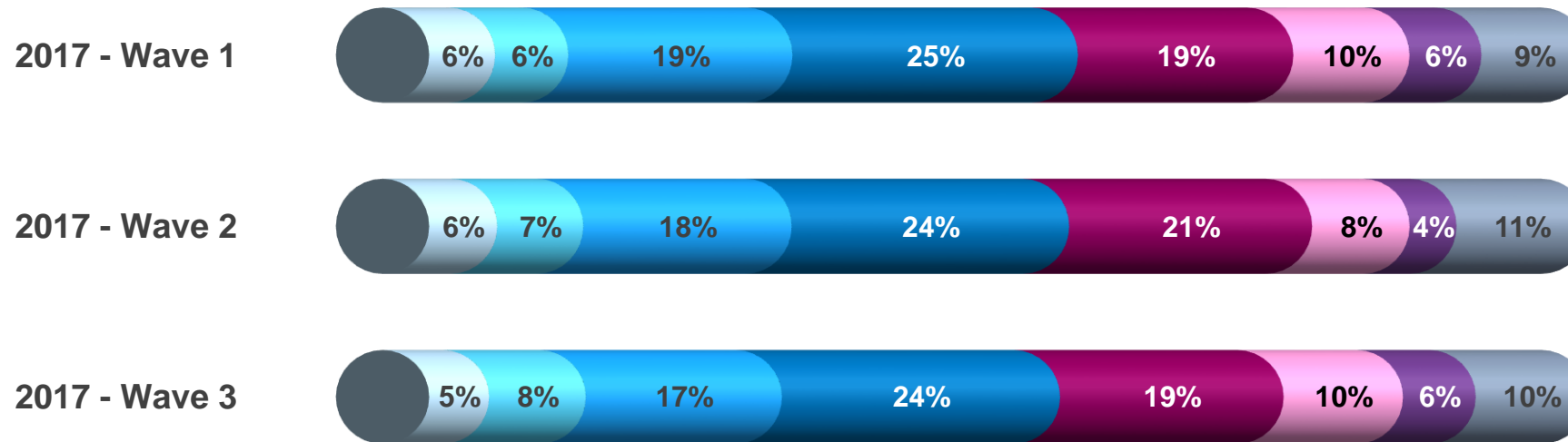
Key Radio Figures North - Average Rating (%) on ALL 18-44

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



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

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

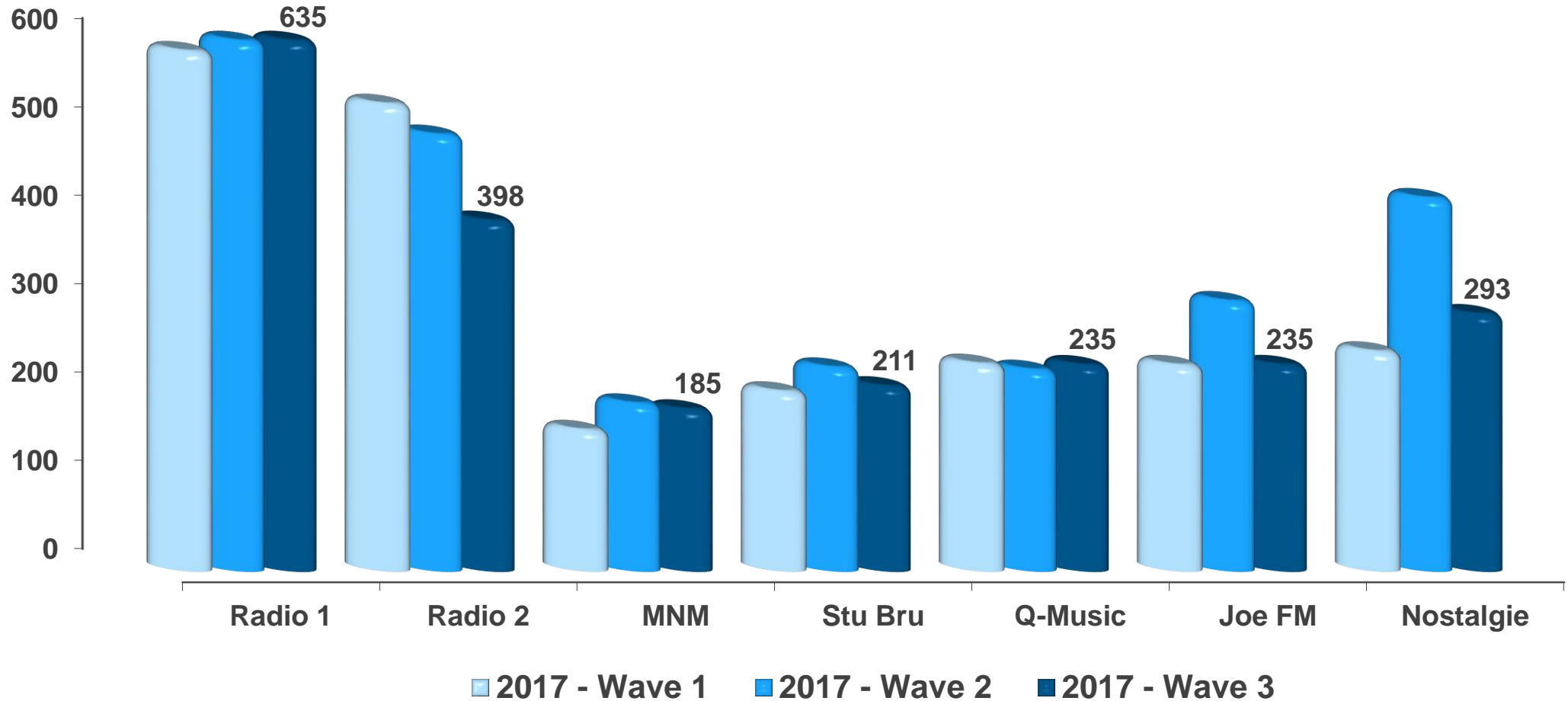


■ Radio 1 ■ Radio 2 ■ MNM ■ Stu Bru
■ Q-Music ■ Joe FM ■ Nostalgie ■ Other

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

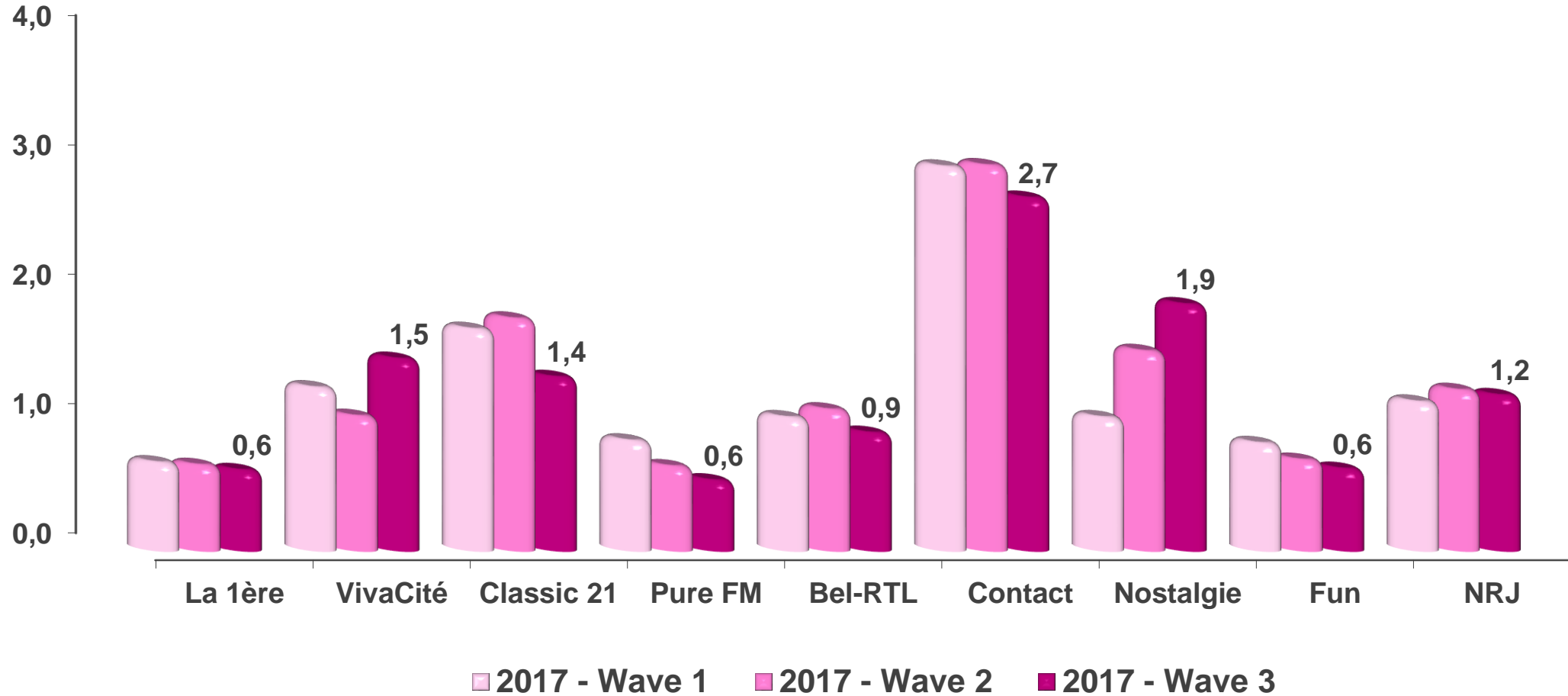
Source: CIM Radio (07:00-19:00/Average Break)

* : no agency commission



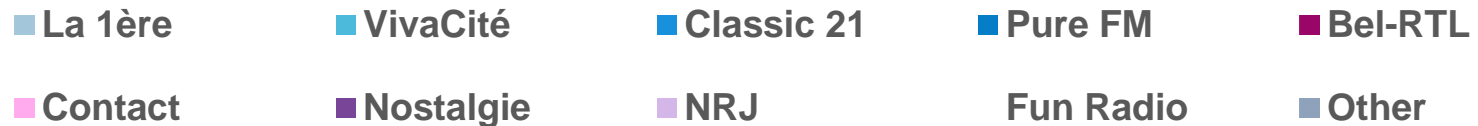
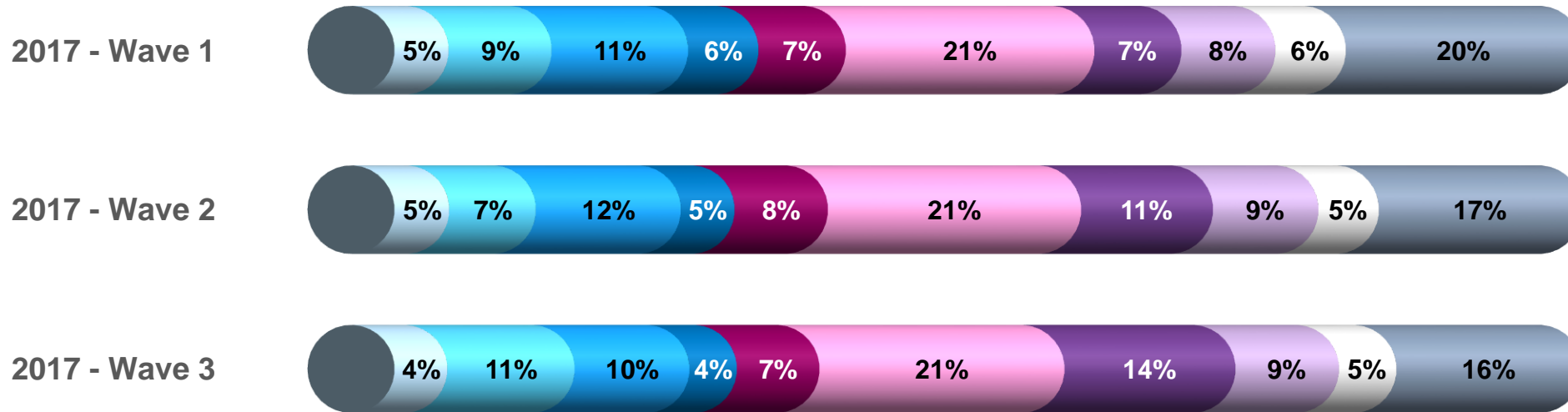
Key Radio Figures South - Average Rating (%) on ALL 18-44

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



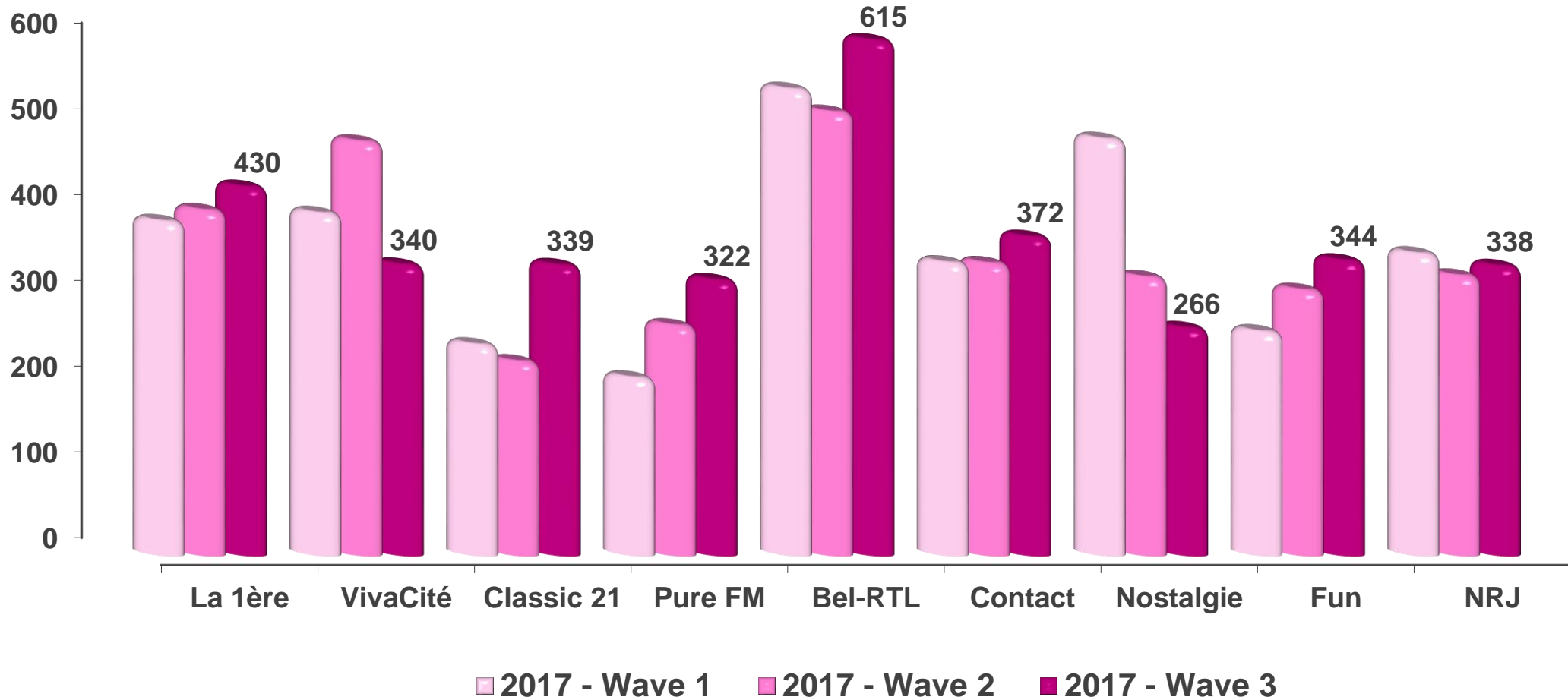
Key Radio Figures South - Audience Shares on ALL 18-44

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



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

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





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-authenticated” 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	260.735	↓ 95	5,6%
Het Nieuwsblad	228.786	↓ 95	5,2%
De Standaard	101.470	→ 100	20,1%
Het Belang van Limburg	91.486	↓ 97	6,5%
Gazet van Antwerpen	84.859	↓ 96	6,1%
De Morgen	52.857	↓ 95	31,2%
De Tijd	42.347	↑ 104	38,7%
Total North	862.540	↓ 96	10,5%

SOUTH	Circulation	vs 2016	% Digital
Sud Presse	81.047	↓ 90	7,5%
L'Avenir	80.265	↓ 97	7,6%
Le Soir	65.006	↓ 95	19,2%
La DH	37.894	↓ 91	7,5%
La Libre Belgique	35.015	↓ 98	15,6%
L'Echo	16.227	↓ 91	41,9%
Grenz Echo	10.194	→ 100	4,6%
Total South	325.648	↓ 94	12,3%

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	718.769	↓ 99	419.343	↓ 93		
Women	353.854	↓ 90	189.245	↓ 93		
Business & News	118.395	↓ 97	144.535	↓ 97	54.743	↑ 112
Generation (Youth/Senior)			16.649	↓ 95	115.606	↑ 106
Men	28.523	↓ 99	17.984	↓ 98	47.440	↑ 102
Lifestyle & Travel					81.164	↓ 97
Build & Deco	13.987	↓ 94	14.086	↓ 87	17.607	↓ 88
TOTAL	1.233.528	↓ 96	801.842	↓ 94	316.560	↑ 103

Figures : 2016 = Cim Authenticated / 2017 = declarations on honour by publishers

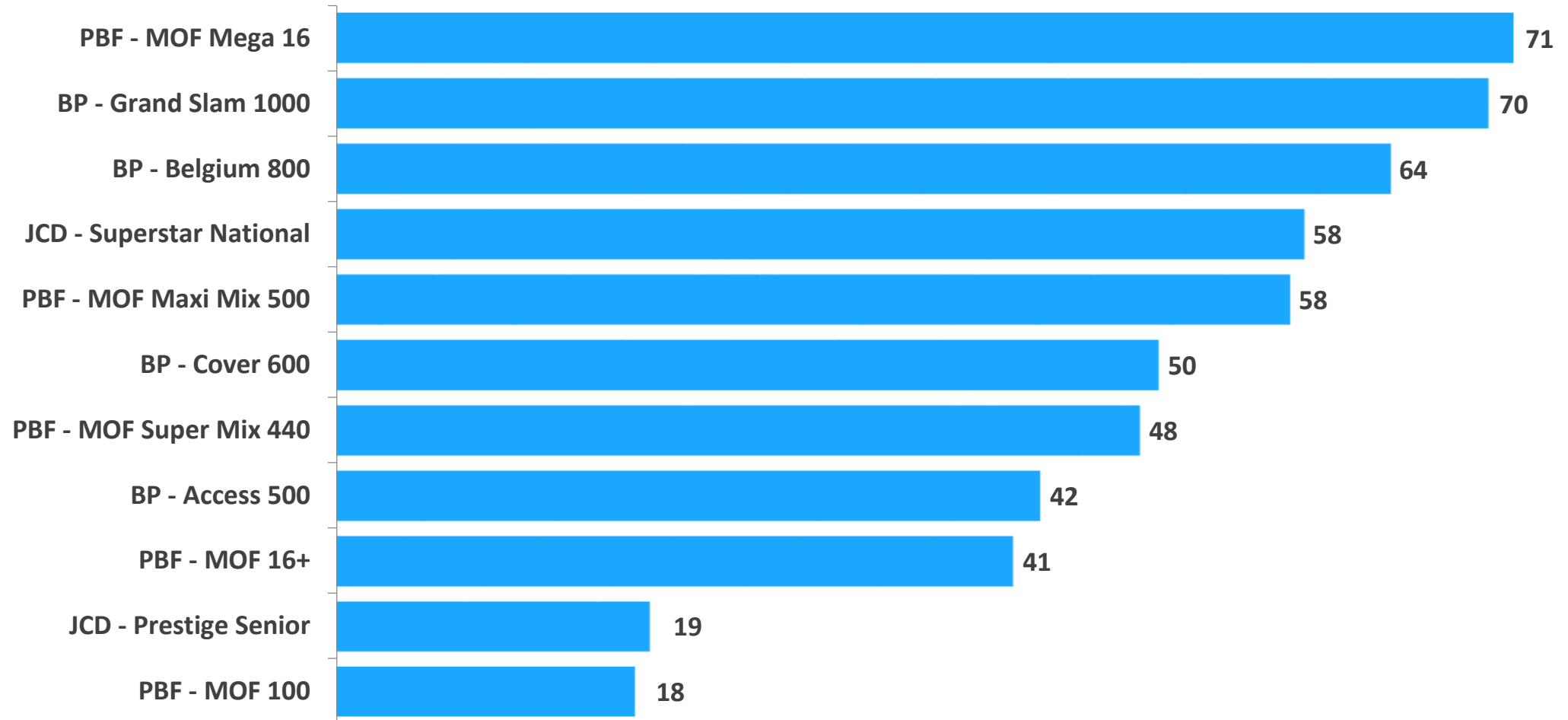


OOH ratings

Key OOH Figures - Panoramic & Classic billboards

VRP's* per day (National) on ALL 18-54

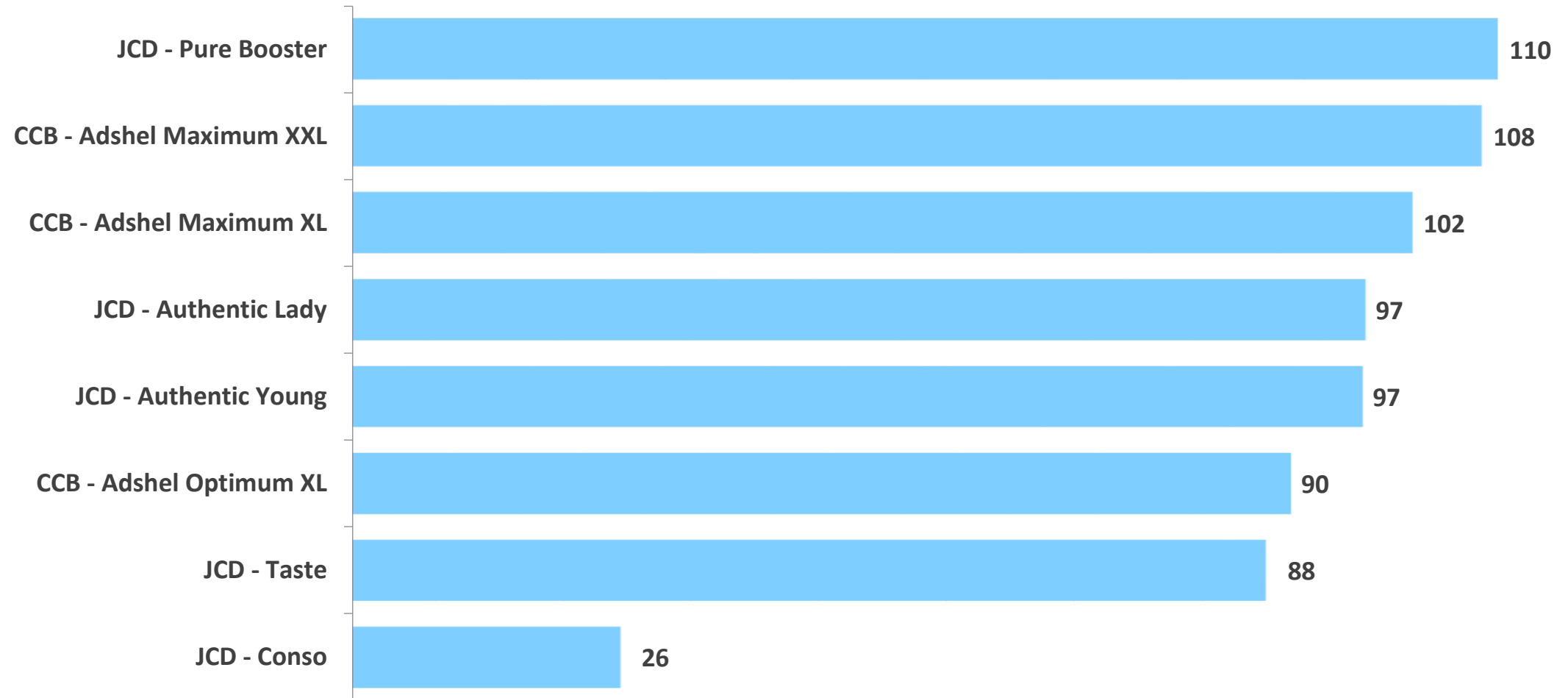
Source: CIM OOH 2017-01 / * : Visibility adjusted Rating Point



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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CONNECTIONS AGENCY