



space

CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

December 2019



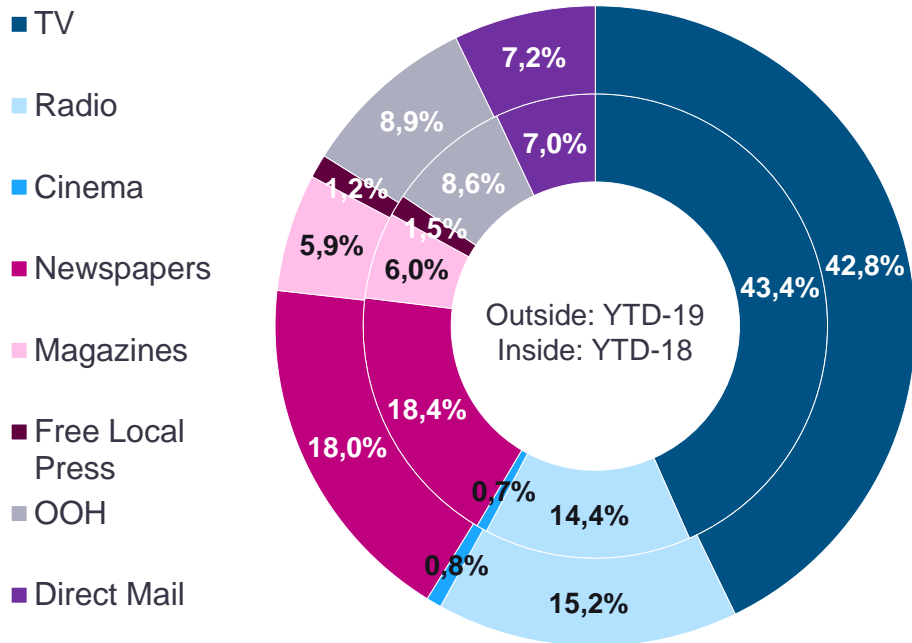
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Nov 2019

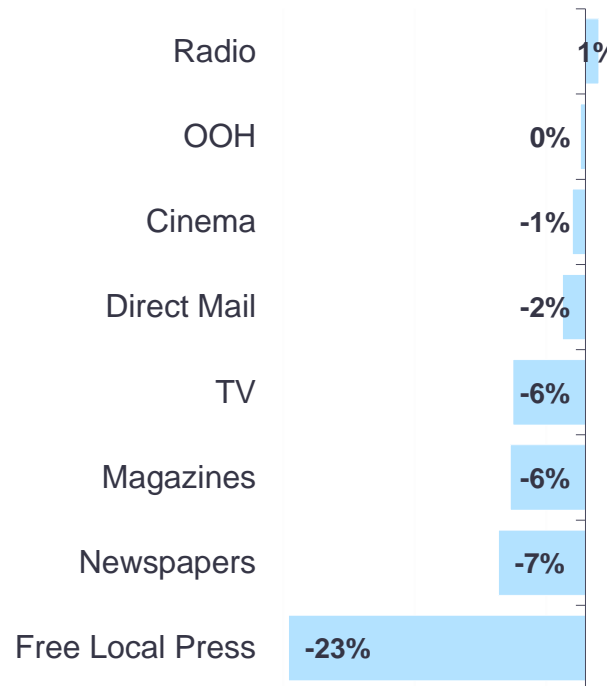
NB : 1) No Internet figures in MDB for 2018 & 2019. 2) Direct Mail : New in 2019.

Market	National	North	South
<ul style="list-style-type: none"> ■ € Mo ■ vs YTD-18 ■ % Region 	3.502,2 - 4,3% 100%	1.965,9 - 2,9% 61%	233,1 - 6,4% 39%

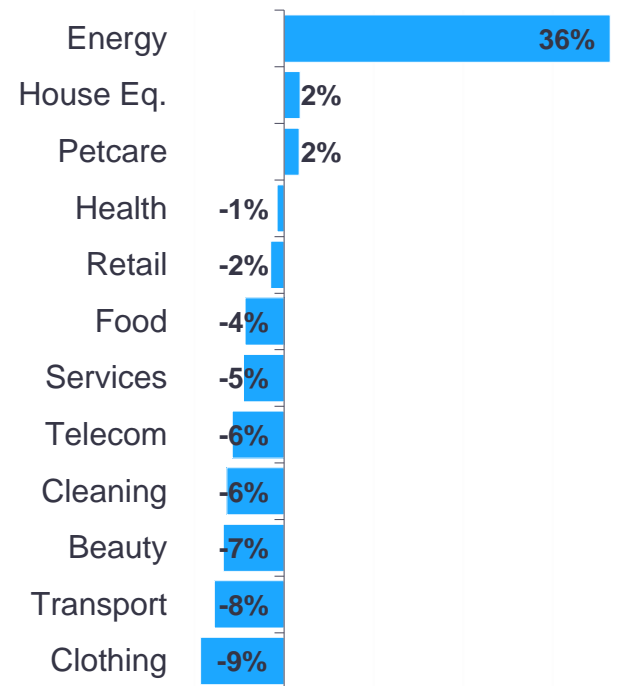
Media Mix Evol.



Media Evol. (vs YTD-18)



EcoGroups Evol. (vs YTD-18)



MDB TOP 30 ADVERTISERS - Jan-Nov 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 BENELUX	103,7	↓ 94
2	COLRUYT GROUP	93,2	↓ 98
3	THE COCA-COLA COMPANY	67,8	↓ 90
4	D'IETEREN GROUP	62,6	↓ 85
5	PSA GROUPE	53,6	↑ 103
6	UNILEVER	47,9	→ 100
7	RECKITT & BENCKISER	47,3	↓ 92
8	AHOLD DELHAIZE	46,4	↑ 130
9	PROXIMUS GROUP	45,2	↓ 80
10	FERRERO	38,2	↑ 163
11	ORANGE	36,1	↑ 104
12	TELENET GROUP HOLDING	35,4	↓ 94
13	RENAULT-NISSAN ALLIANCE	34,3	↓ 98
14	CARREFOUR GROUP	33,4	↑ 105
15	VINTED	31,2	↑ 4639

Rank	ADV.GROUP	Gross Inv.	vs YTD-18
16	L'OREAL GROUP	27,8	↓ 92
17	NETHYS	25,0	↑ 126
18	THE WALT DISNEY COMPANY	24,6	↑ 108
19	LOTERIE NATIONALE	23,0	↓ 91
20	ALDI	23,0	↓ 93
21	FIAT CHRYSLER AUTOMOBILES	21,3	↓ 77
22	MONDELEZ INTERNATIONAL	21,2	↓ 83
23	AS WATSON	18,7	↓ 95
24	BMW GROUP BELGIUM	18,5	↑ 115
25	GROUPE 3 SUISES	18,4	↓ 97
26	LIDL & CO	18,2	↑ 125
27	BEIERSDORF	18,2	↓ 81
28	METRO GROUP	17,4	↓ 98
29	DANONE GROUP	16,8	↓ 67
30	NESTLE GROUP	15,6	↑ 108



Key TV figures

Key TV figures North - Dec-19

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Dec-19	YTD	Dec-19	YTD	Dec-19	YTD
VTM	PRP 18-54	6,9	6,4	24,9	24,1	928	958
Q2	PRP 18-44	1,6	1,6	6,8	7,0	1.018	963
VITAYA	PRP 18-54	1,5	1,4	5,3	5,1	668	865
CAZ	MEN 18-54	0,5	0,5	2,2	2,2	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	3,5	3,4	12,7	12,8	1.090	975
VIJF	PRP 18-54	1,4	1,5	4,9	5,5	618	780
ZES	PRP 18-54	0,4	0,6	1,5	2,1	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	27,8	26,4				
Total TV	PRP 18-44	23,9	22,8				
Total TV	MEN 18-54	23,7	21,8				

Key TV indexes North - Dec-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	
		Dec-19	YTD	Dec-19	YTD	Dec-19	YTD
VTM	PRP 18-54	↑ 107	↓ 97	↑ 112	↘ 99	✗ 105	✗ 109
Q2	PRP 18-44	↓ 77	↓ 81	↓ 82	↓ 86	✗ 121	✗ 114
VITAYA	PRP 18-54	↓ 97	↑ 103	↗ 101	↑ 106	✓ 91	✗ 119
CAZ	MEN 18-54	↓ 91	↓ 98	↓ 94	↑ 102	Package	Package
VIER	PRP 18-54	↓ 93	↑ 109	↓ 97	↑ 111	✗ 117	✗ 105
VIJF	PRP 18-54	↓ 94	↓ 92	↘ 99	↓ 94	✓ 80	⚠ 101
ZES	PRP 18-54	↓ 60	↓ 89	↓ 63	↓ 91	Package	Package
Total TV	PRP 18-54	↓ 96	↓ 98				
Total TV	PRP 18-44	↓ 94	↓ 95				
Total TV	MEN 18-54	↘ 99	↓ 97				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

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

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

Variable	Channel	Daypart	2016	2017	2018	2019	19 vs 18
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	28,2%	28,7%	28,3%	28,2%	100
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	85,8%	85,4%	82,8%	81,3%	98
	VHS + DVD player + Blu-Ray	"	4,3%	4,0%	3,5%	2,5%	71
	Video on demand + Digital recorder	"	8,6%	9,4%	12,1%	14,6%	120
	Game console and other devices (3)	"	1,3%	1,3%	1,6%	1,7%	101
% Time shift viewing (4)	All Channels	"	18,3%	23,7%	25,9%	29,2%	112
	Main Channels (5)	"	22,1%	26,6%	30,2%	33,0%	109
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	85	86	86	85	
	Main channels (5) - TSV	"	28	31	34	35	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	113	108	103	97	94
	All TV channels (TSV)	"	22	29	30	32	107
	All TV channels (Live + TSV)	"	135	137	133	129	97
	Other TV Screen Usage	"	29	31	36	38	105
	Total TV Screen Usage	"	165	169	169	167	99

Key TV figures South - Dec-19

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Dec-19	YTD	Dec-19	YTD	Dec-19	YTD
RTL-TVI	PRP 18-54	6,2	6,5	23,4	25,3	1.023	846
Club-RTL	MEN 18-54	1,3	1,3	7,0	6,8	1.070	903
Plug-RTL	ALL 15-34	0,5	0,6	3,2	3,8	1.076	829
La Une	PRP 18-54	3,7	3,7	14,0	14,3	666	640
La Deux	PRP 18-54	1,6	1,4	6,0	5,4	593	601
AB3	PRP 18-44	2,9	2,3	12,8	10,7	606	658
TF1	PRP 18-54	3,3	3,0	12,6	11,6	586	609
TTV	PRP 18-54	26,3	25,7				
TTV	PRP 18-44	22,3	21,7				
TTV	ALL 15-34	15,4	14,7				
TTV	MEN 18-54	19,0	19,4				

Key TV indexes South - Dec-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	
		Dec-19	YTD	Dec-19	YTD	Dec-19	YTD
RTL-TV1	PRP 18-54	↓ 76	↓ 92	↓ 85	↓ 97	✗ 125	✗ 110
Club-RTL	MEN 18-54	↑ 106	↓ 90	↑ 128	↘ 99	✗ 117	✗ 109
Plug-RTL	ALL 15-34	↓ 91	↓ 95	→ 100	↓ 97	✗ 139	✗ 115
La Une	PRP 18-54	↓ 97	↓ 97	↑ 108	↑ 103	✓ 100	⚠ 101
La Deux	PRP 18-54	↓ 92	↓ 72	↑ 103	↓ 76	✓ 94	⚠ 101
AB3	PRP 18-44	↑ 107	↓ 95	↑ 122	↑ 102	✓ 94	✗ 105
TF1	PRP 18-54	↓ 80	↓ 86	↓ 90	↓ 91	N.A. (Package in 2018)	
TTV	PRP 18-54	↓ 89	↓ 94				
TTV	PRP 18-44	↓ 88	↓ 93				
TTV	ALL 15-34	↓ 90	↓ 97				
TTV	MEN 18-54	↓ 84	↓ 91				

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

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

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

Variable	Channel	Daypart	2016	2017	2018	2019	19 vs 18
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	33,6%	32,8%	31,6%	31,2%	99
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	80,6%	78,0%	75,1%	71,3%	95
	VHS + DVD player + Blu-Ray	"	7,0%	6,9%	6,2%	4,7%	75
	Video on demand + Digital recorder	"	11,5%	14,3%	17,9%	22,6%	126
	Game console and other devices (3)	"	0,8%	0,8%	0,8%	1,4%	178
% Time shift viewing (4)	All Channels	"	13,4%	18,8%	20,3%	22,1%	109
	Main Channels (5)	"	14,5%	20,3%	20,8%	22,8%	110
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	89	88	84	87	
	Main channels (5) - TSV	"	52	51	52	50	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	157	140	128	121	95
	All TV channels (TSV)	"	21	27	26	28	106
	All TV channels (Live + TSV)	"	178	167	154	149	97
	Other TV Screen Usage	"	51	55	60	69	114
	Total TV Screen Usage	"	229	222	214	218	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 - Dec-19

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.446.952	11	Gazet van Antwerpen	273.690
2	Nieuwsblad	1.074.943	12	Sporza	263.650
3	Sudinfo	469.556	13	Het Belang van Limburg	201.174
4	VRT	370.517	14	De Morgen	189.545
5	RTL.be	356.744	15	Immoweb	179.922
6	DH.be	334.890	16	Flair	163.637
7	RTBF.be	315.174	17	Libelle/Femmes d'Aujourd'hui	155.187
8	De Standaard	309.345	18	7sur7.be	154.634
9	2dehands.be-2ememain.be	297.468	19	L'Avenir.net	151.693
10	Le Soir	279.792	20	Knack-Le Vif	145.289

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

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

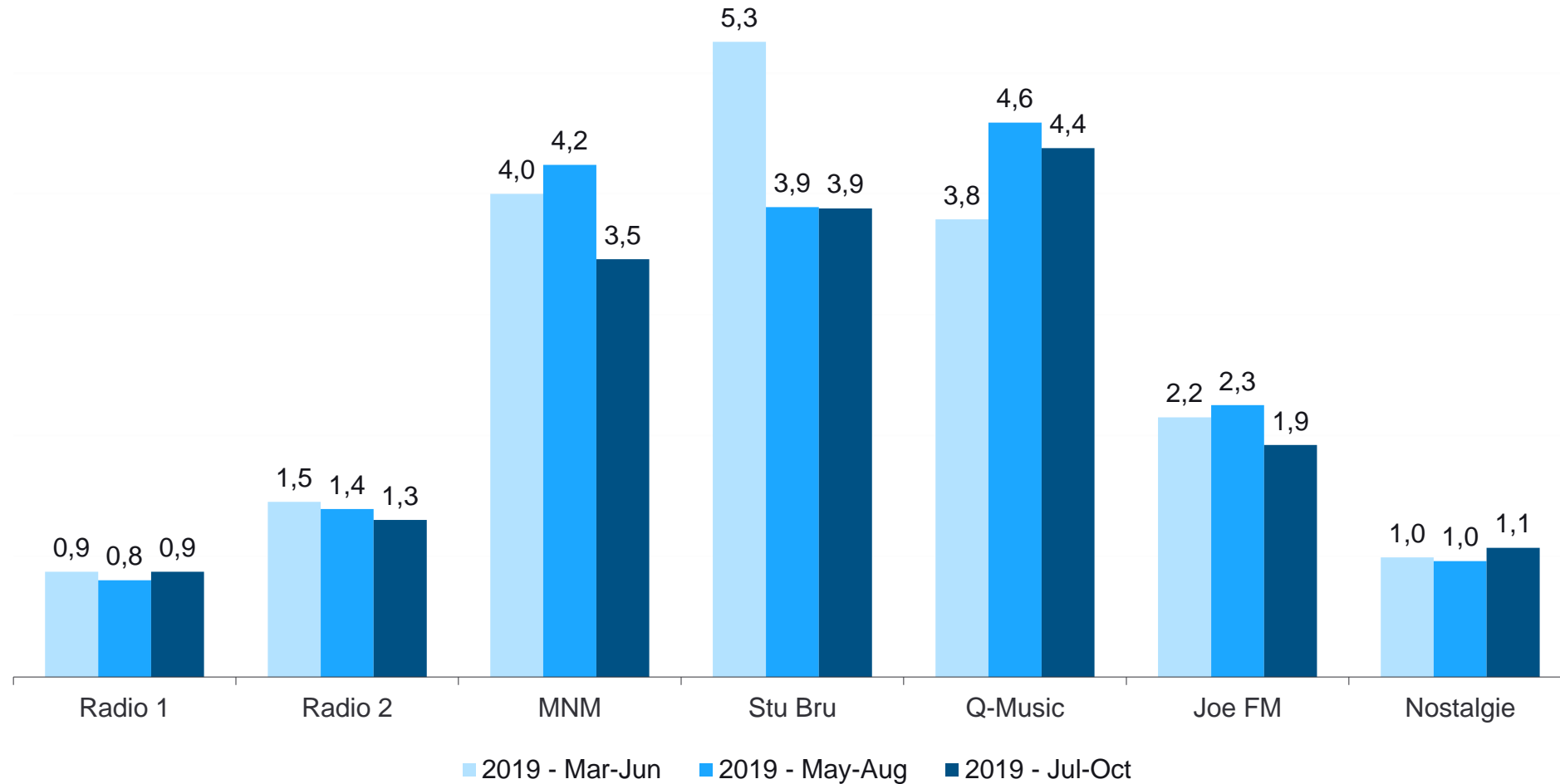
Website	Daily Visitors (000)
MSN.COM	1.022
GOOGLE.BE	1.012
MSN.BE	866
FACEBOOK.COM	657
LINKEDIN.COM	630
LIVE.COM	615
GOOGLE.COM	433
BING.COM	365
YOUTUBE.COM	327
YAHOO.COM	265



Key Radio figures

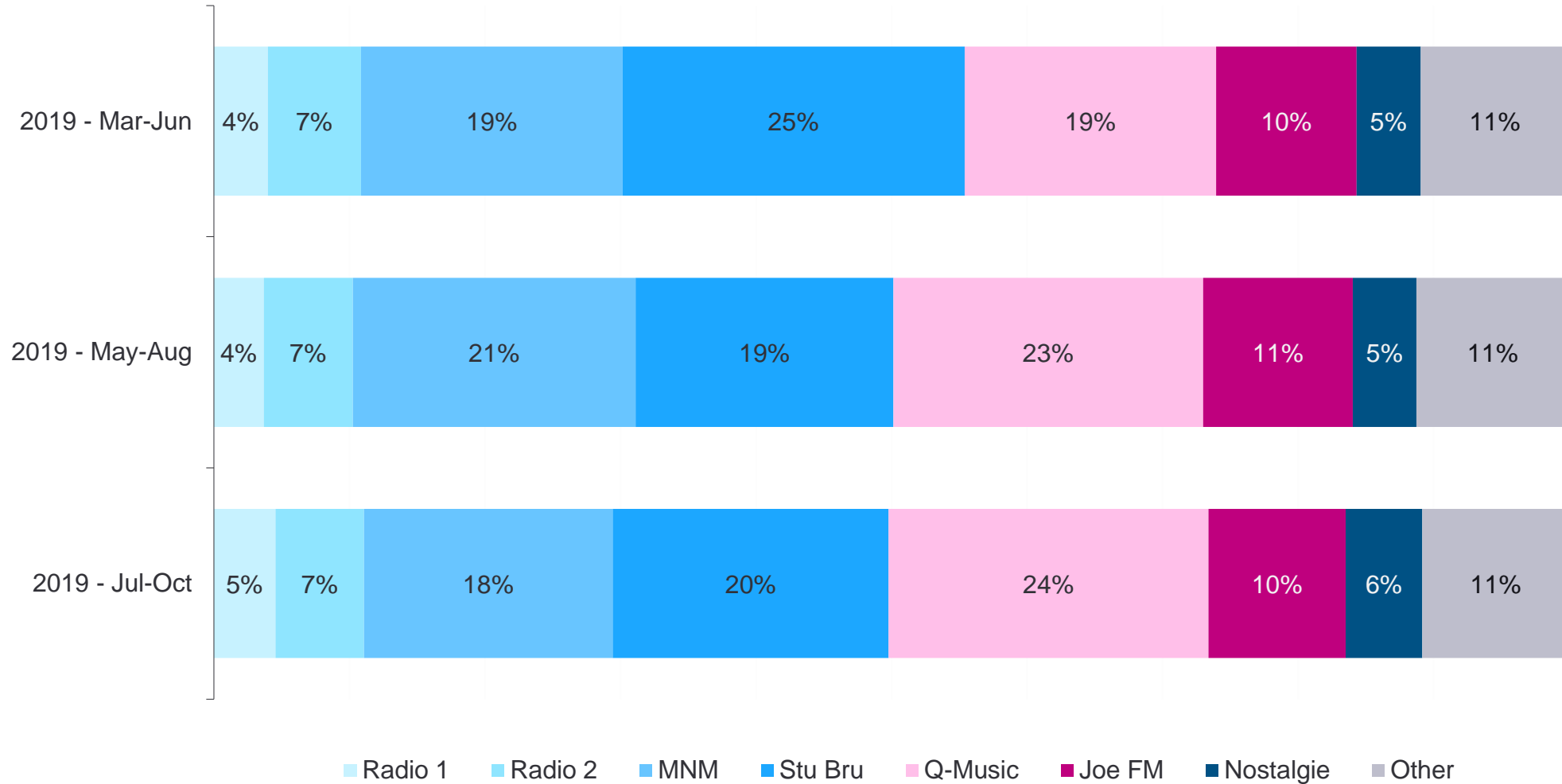
KEY RADIO FIGURES NORTH

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



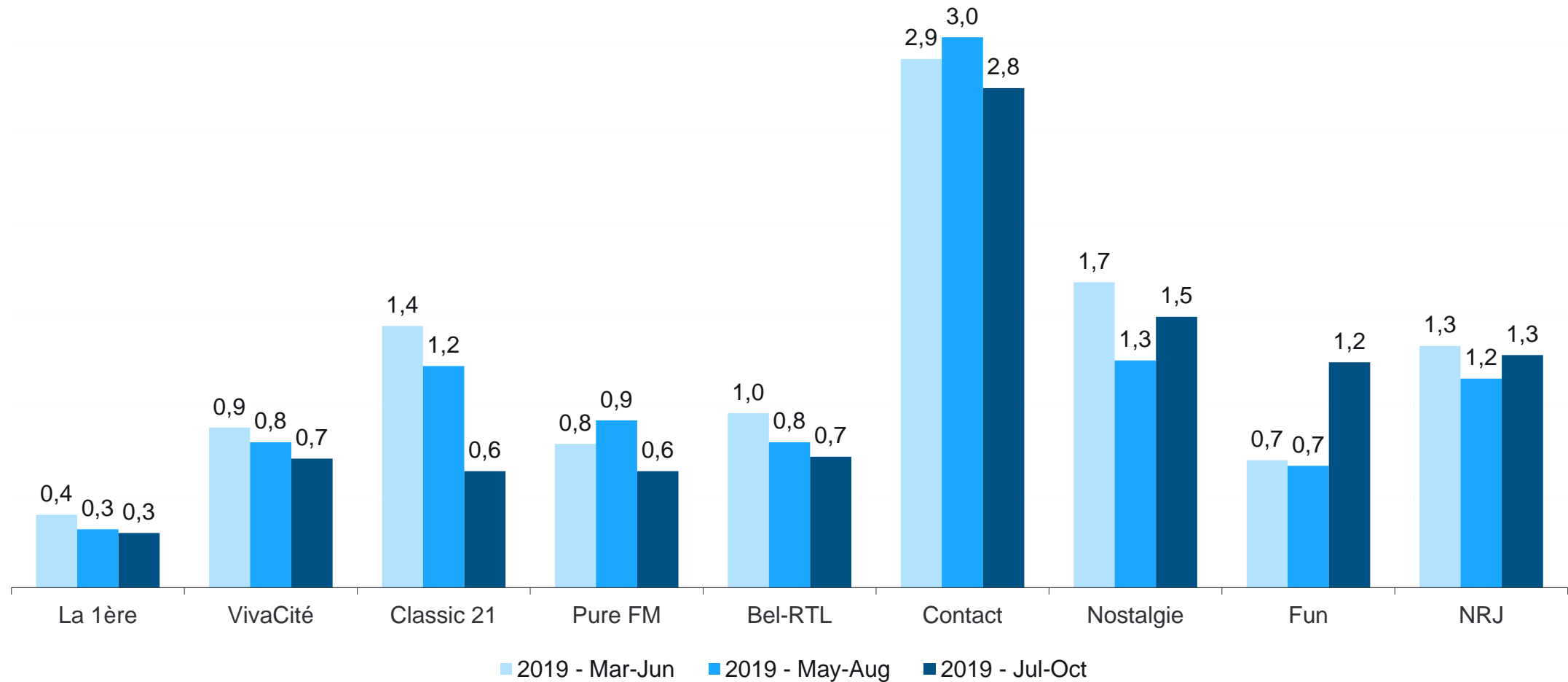
KEY RADIO FIGURES NORTH

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



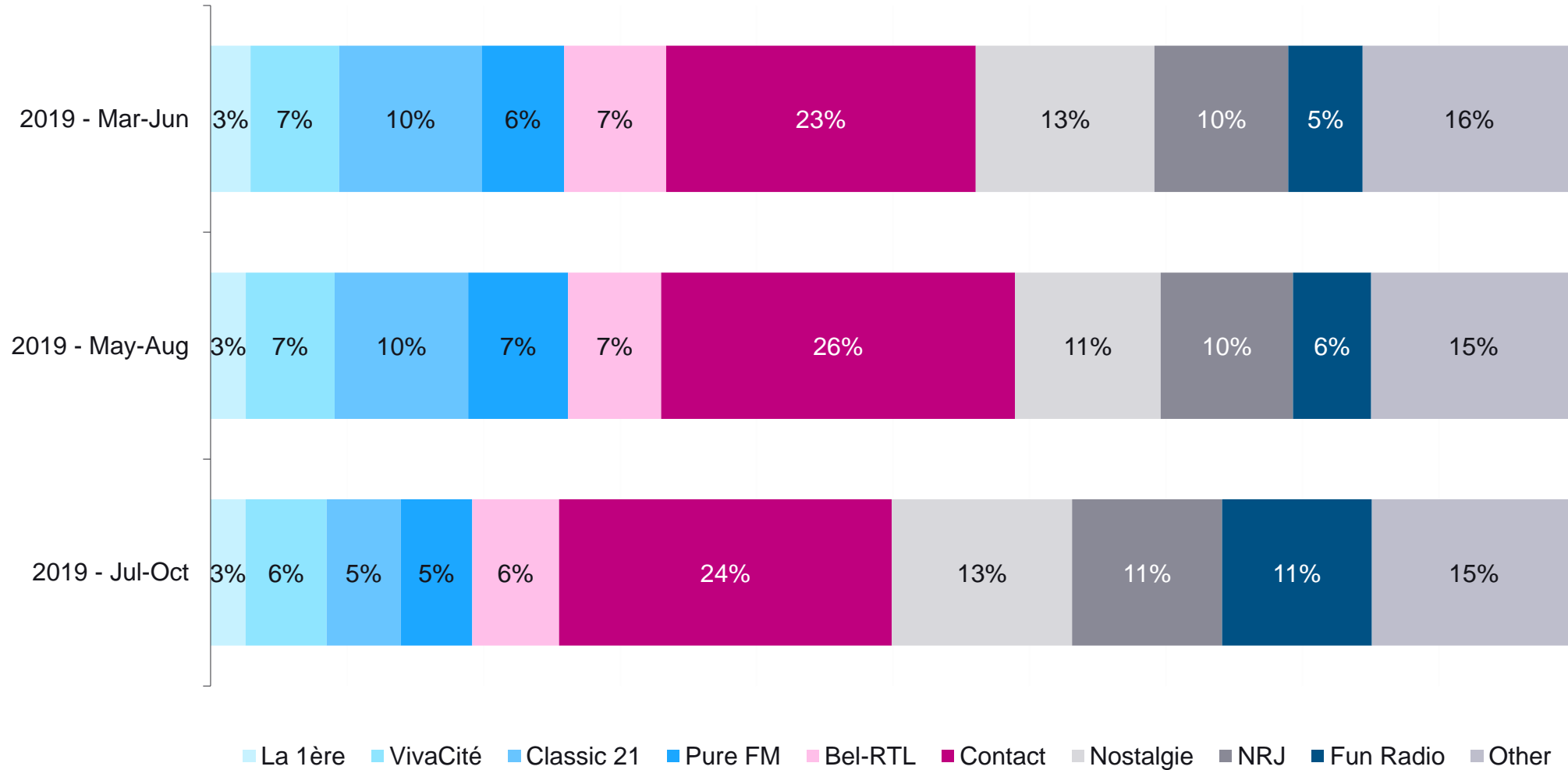
KEY RADIO FIGURES SOUTH

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

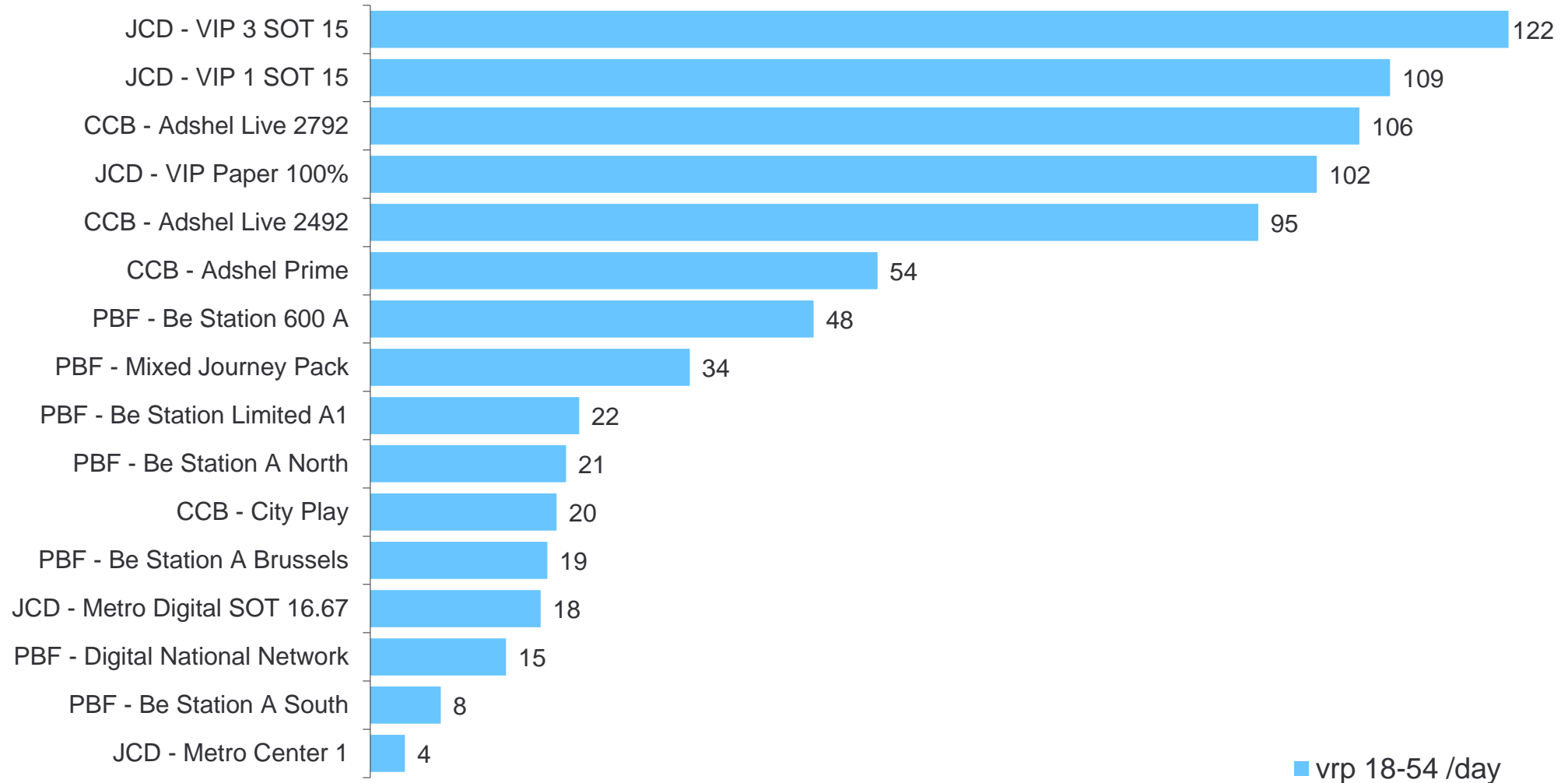
Key Print Figures - Magazines Circulation - Year 2018 (Paid + Free - digital sales included)

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 - Street furniture & Stations VRP's* per day (National) on ALL 18-54



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

