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CONNECTIONS AGENCY



MARKET PERFORMANCES BAROMETER

Status March 2018

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Gross Media Investments Evolution

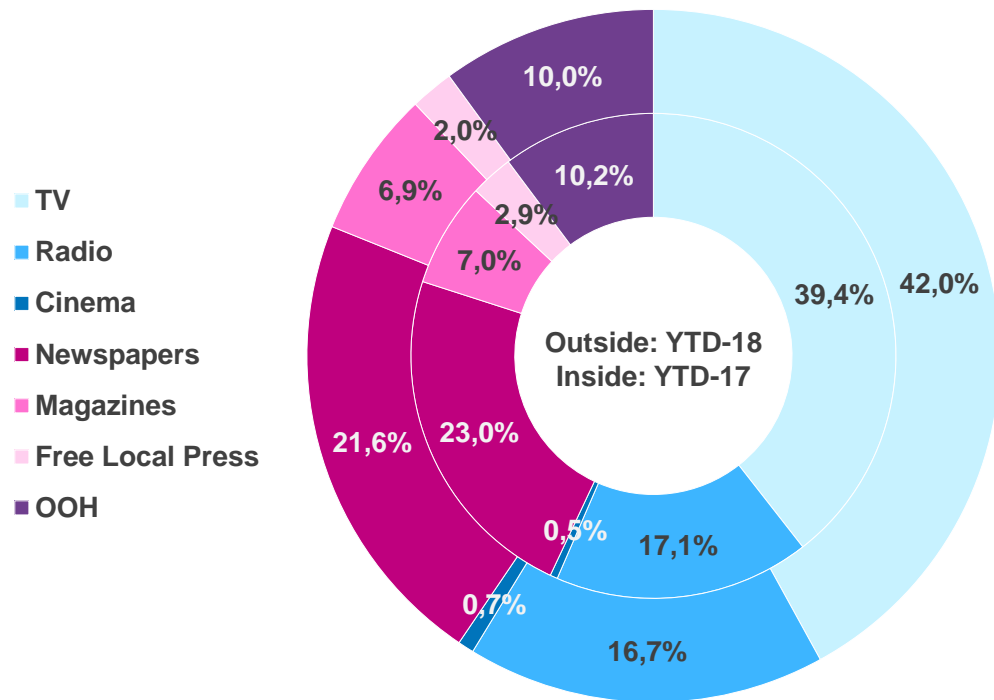
GROSS MEDIA INVESTMENTS EVOLUTION

Jan-Feb 2018

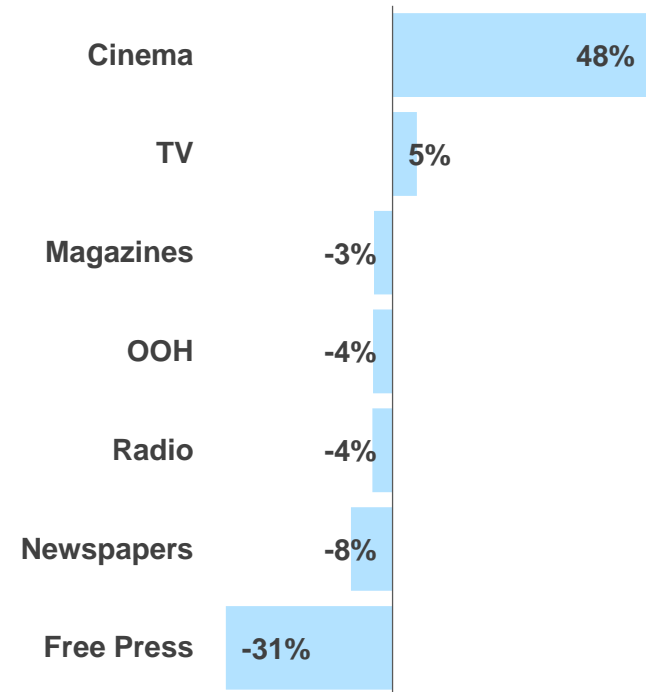
Source: MDB / Nielsen

Market	National	North	South
<ul style="list-style-type: none"> • € Mo • vs YTD-17 * • % Region 	<ul style="list-style-type: none"> • 505,0 • - 1,8% • 100% 	<ul style="list-style-type: none"> • 293,9 • - 1,8% • 58% 	<ul style="list-style-type: none"> • 211,1 • - 1,9% • 42%

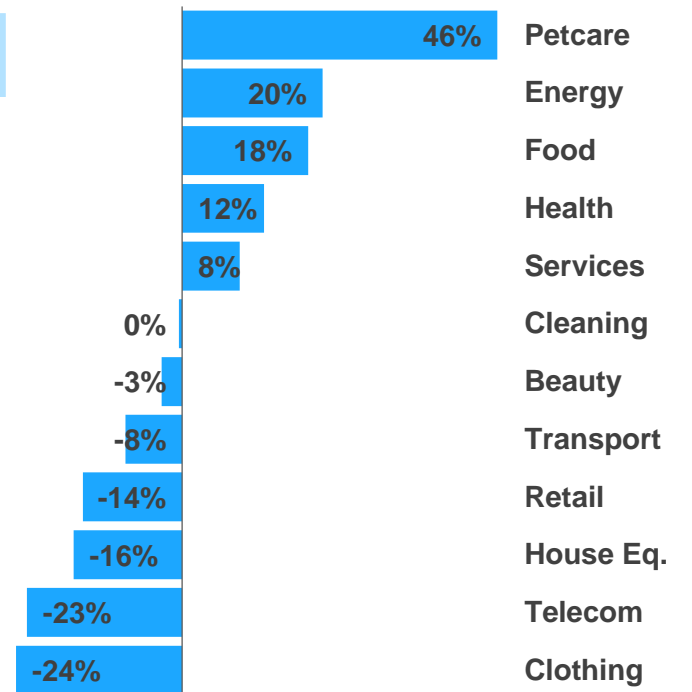
Media Mix Evol.



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-Feb 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	20,1	↓ 98	16	AHOLD DELHAIZE	3,9	↑ 139
2	PROCTER & GAMBLE	15,8	↑ 111	17	ORANGE	3,8	↓ 44
3	PSA PEUGEOT CITROEN	9,5	↓ 94	18	AXA GROUP	3,7	↑ 208
4	PROXIMUS GROUP	8,6	↑ 177	19	COLRUYT GROUP	3,6	↓ 90
5	RECKITT & BENCKISER	7,9	↓ 69	20	GENERAL MOTORS CORP.	3,6	↑ 118
6	RENAULT-NISSAN ALLIANCE	7,0	↓ 87	21	GLAXOSMITHKLINE	3,2	→ 99
7	FORD MOTOR COMPANY	6,0	↑ 120	22	JAGUAR LAND ROVER BELUX	3,2	↑ 113
8	TELENET GROUP	5,6	↓ 87	23	BEIERSDORF	3,2	↑ 113
9	COCA-COLA COMPANY	5,6	↑ 264	24	ING GROUP	3,1	↓ 96
10	FIAT CHRYSLER AUTOMOBILES	5,0	↑ 131	25	THE WALT DISNEY COMPANY	2,9	↑ 191
11	BELFIUS	4,6	↑ 152	26	BASIC-FIT	2,8	→ 100
12	MONDELEZ INTERNATIONAL	4,5	↑ 107	27	FERRERO	2,8	↑ 123
13	DANONE GROUP	4,4	↑ 134	28	METRO GROUP (Media Markt)	2,6	↓ 87
14	UNILEVER	4,3	↑ 139	29	ALCOPA (Hyundai, ...)	2,6	↓ 69
15	L'OREAL GROUP	4,0	↑ 108	30	TRIVAGO	2,5	↓ 70

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



Key TV Figures

Key TV figures North - Mar-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	
		Mar-18	YTD	Mar-18	YTD	Mar-18	YTD
VTM	PRP 18-54	8,4	8,0	26,9	25,8	841	693
Q2	PRP 18-44	2,3	2,2	8,0	7,9	784	654
VITAYA	PRP 18-54	1,3	1,3	4,0	4,2	750	759
VIER	PRP 18-54	3,4	2,9	10,8	9,5	913	850
VIJF	PRP 18-54	2,2	2,0	6,9	6,5	740	596
Total TV	PRP 18-54	31,2	31,0				
Total TV	PRP 18-44	28,3	27,6				

Key TV indexes North - Mar-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Mar-18 vs P-1	YTD	Mar-18 vs P-1	YTD	Mar-18 vs Channel's Objective	YTD
VTM	PRP 18-54	↑ 111	↑ 104	↑ 104	↔ 101	✓ 90	✓ 95
Q2	PRP 18-44	↘ 99	→ 100	↓ 92	↓ 97	✓ 90	✓ 96
VITAYA	PRP 18-54	↓ 91	↓ 92	↓ 85	↓ 90	✓ 98	✗ 126
VIER	PRP 18-54	↘ 99	↓ 93	↓ 93	↓ 91	✓ 94	✗ 108
VIJF	PRP 18-54	↑ 120	↑ 117	↑ 113	↑ 114	✓ 93	✓ 92
Total TV	PRP 18-54	↑ 107	↑ 102				
Total TV	PRP 18-44	↑ 107	↑ 103				

Time Shift Viewing & Other TV Screen Usage Evolution

Market: NORTH - Period: Jan-Mar - 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	32,1%	31,3%	31,6%	32,1%	101
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	87,9%	85,7%	86,5%	84,3%	97
	VHS + DVD player + Blue Ray	"	3,6%	4,7%	4,0%	3,5%	86
	Video on demand + Digital recorder	"	7,4%	8,1%	8,3%	10,8%	130
	Game console and other devices (3)	"	1,1%	1,6%	1,2%	1,5%	126
% Time shift viewing (4)	All Channels	"	11,6%	15,7%	25,0%	25,6%	102
	Main Channels (5)	"	14,1%	19,4%	27,9%	28,8%	103
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	89	87	87	88	
	Main channels (5) - TSV	"	24	28	28	34	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	141	129	117	116	100
	All TV channels (TSV)	"	15	20	33	34	102
	All TV channels (Live + TSV)	"	156	149	150	150	100
	Other TV Screen Usage	"	29	33	31	37	118
	Total TV Screen Usage	"	186	182	181	187	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 - Mar-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	
		Mar-18	YTD	Mar-18	YTD	Mar-18	YTD
RTL-TVI	PRP 18-54	8,5	8,6	27,4	27,4	894	714
Club-RTL	MEN 18-54	1,7	1,7	7,3	7,0	1.021	792
Plug-RTL	ALL 15-34	0,7	0,8	3,8	4,5	1.144	858
La Une	PRP 18-54	4,2	3,9	13,4	12,6	788	720
La Deux	PRP 18-54	1,7	1,6	5,4	5,2	743	665
AB3	PRP 18-44	2,8	2,6	10,4	9,7	691	547
TF1	PRP 18-54	4,8	4,5	15,4	14,5	780	555
TTV	PRP 18-54	31,1	31,2				
TTV	PRP 18-44	26,7	27,0				
TTV	ALL 15-34	17,3	18,1				
TTV	MEN 18-54	23,8	23,9				

Key TV indexes South - Mar-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Mar-18 vs P-1	YTD	Mar-18 vs P-1	YTD	Mar-18 vs Channel's Objective	YTD
RTL-TVI	PRP 18-54	↑ 104	↓ 97	↑ 103	↘ 99	✓ 98	✓ 99
Club-RTL	MEN 18-54	↑ 115	↑ 117	↑ 112	↑ 118	✗ 103	✗ 102
Plug-RTL	ALL 15-34	↓ 64	↓ 86	↓ 66	↓ 90	✗ 125	✗ 117
La Une	PRP 18-54	→ 100	↓ 89	↓ 98	↓ 91	✓ 98	✗ 108
La Deux	PRP 18-54	↑ 106	↑ 104	↑ 104	↑ 105	✗ 105	✗ 114
AB3	PRP 18-44	↘ 99	↓ 96	↓ 98	↘ 99	✓ 93	✓ 89
TF1	PRP 18-54	↓ 91	↓ 95	↓ 90	↓ 97	-	-
TTV	PRP 18-54	↗ 101	↓ 98				
TTV	PRP 18-44	↗ 101	↓ 97				
TTV	ALL 15-34	↓ 97	↓ 96				
TTV	MEN 18-54	↑ 103	↘ 99				

Time Shift Viewing & Other TV Screen Usage Evolution

Market: SOUTH - Period: Jan-Mar - 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	35,5%	36,0%	35,6%	35,4%	99
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	82,1%	81,7%	78,9%	76,5%	97
	VHS + DVD player + Blue Ray	"	6,9%	7,2%	7,3%	6,6%	90
	Video on demand + Digital recorder	"	9,6%	10,5%	13,1%	16,1%	123
	Game console and other devices (3)	"	1,3%	0,7%	0,7%	0,8%	118
% Time shift viewing (4)	All Channels	"	7,6%	12,9%	17,5%	21,1%	121
	Main Channels (5)	"	8,3%	14,1%	19,2%	22,5%	117
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	90	91	90	88	
	Main channels (5) - TSV	"	44	50	51	49	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	176	169	154	144	94
	All TV channels (TSV)	"	12	21	28	31	110
	All TV channels (Live + TSV)	"	187	190	182	175	96
	Other TV Screen Usage	"	50	52	57	62	109
	Total TV Screen Usage	"	237	242	238	237	99

(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 - Mar-18

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

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.175.649	11	Sporza	245.680
2	Nieuwsblad	1.066.400	12	Immoweb	237.552
3	2dehands.be-2ememain.be	585.352	13	Le Soir	227.157
4	VRT	356.885	14	Knack-Le Vif	219.946
5	De Standaard	355.875	15	Het Belang van Limburg	214.311
6	Gazet van Antwerpen	283.178	16	VTM	182.761
7	RTBF.be	271.044	17	De Morgen	165.326
8	Sudinfo	263.219	18	7sur7.be	148.784
9	RTL.be	262.687	19	La Libre.be	142.448
10	DH.be	254.498	20	L'Avenir.net	136.847

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

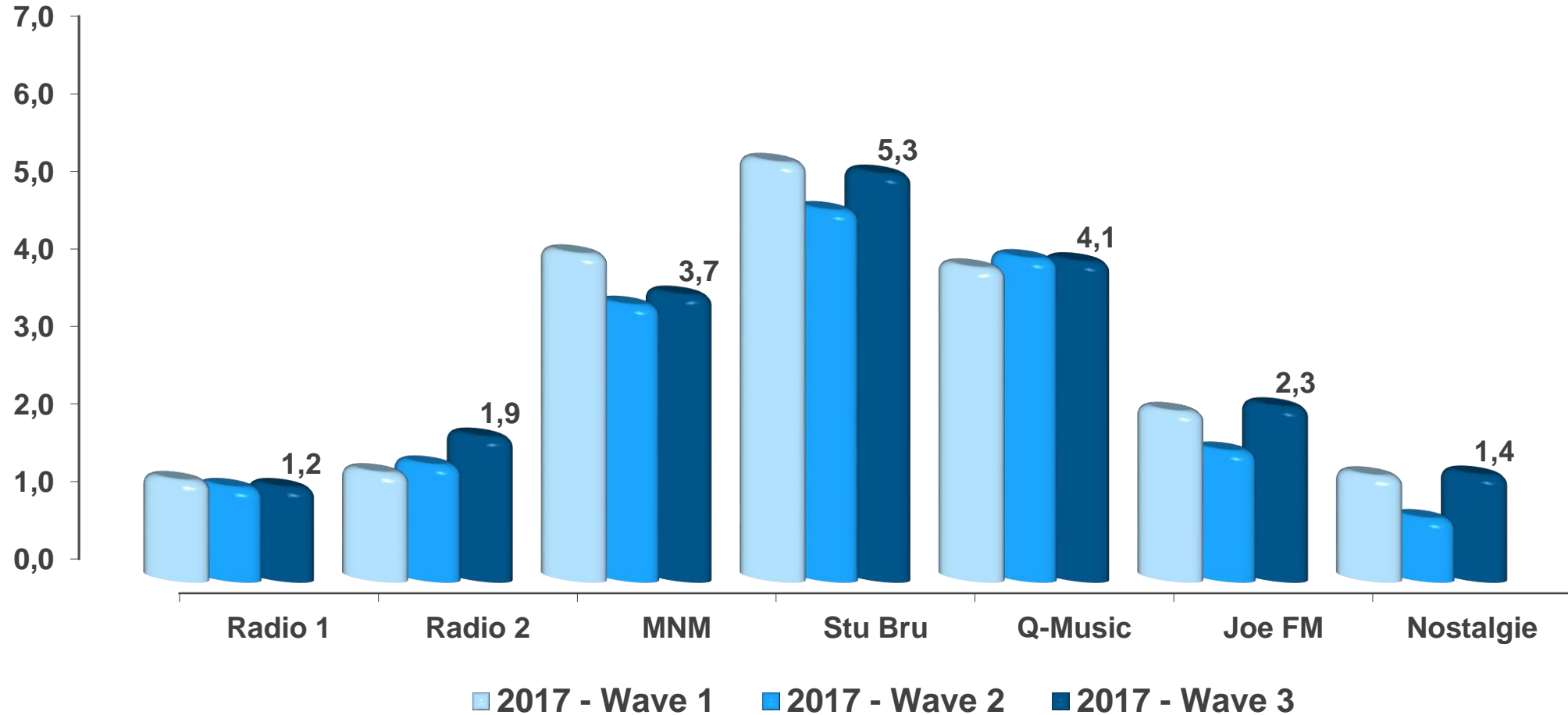
NB: Comscore stopped measuring the Belgian market on December 31, 2017



Key Radio Figures

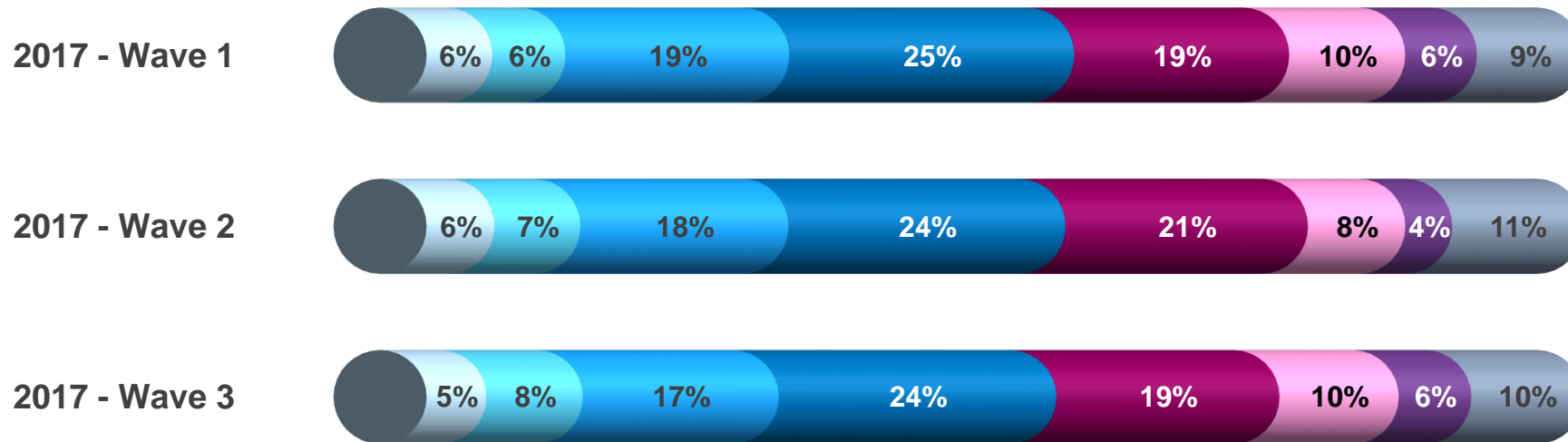
Key Radio Figures North - Average Rating (%) on ALL 18-44

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



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

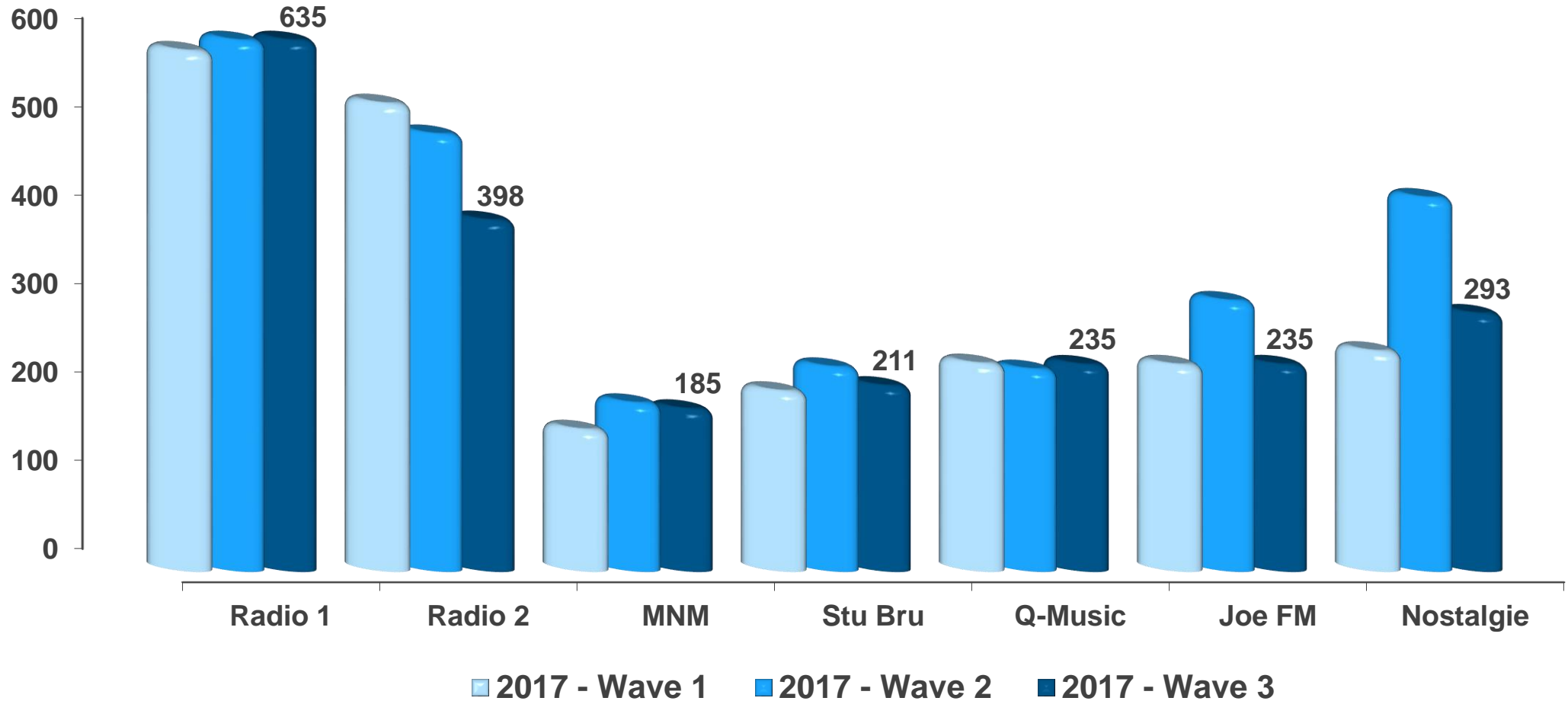
Source: CIM Radio (07:00-19:00)



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

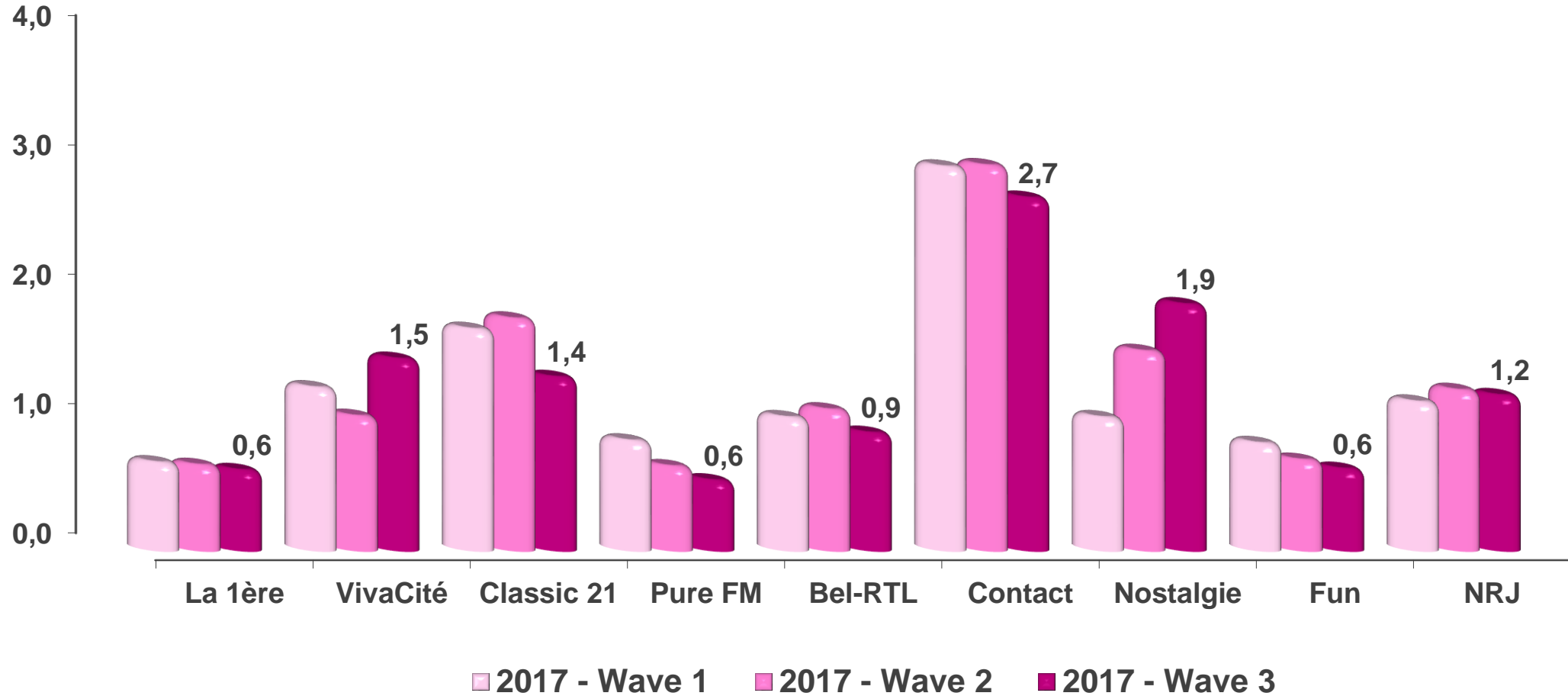
Source: CIM Radio (07:00-19:00/Average Break)

* : no agency commission



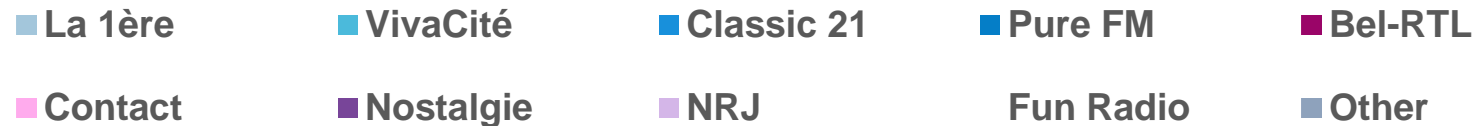
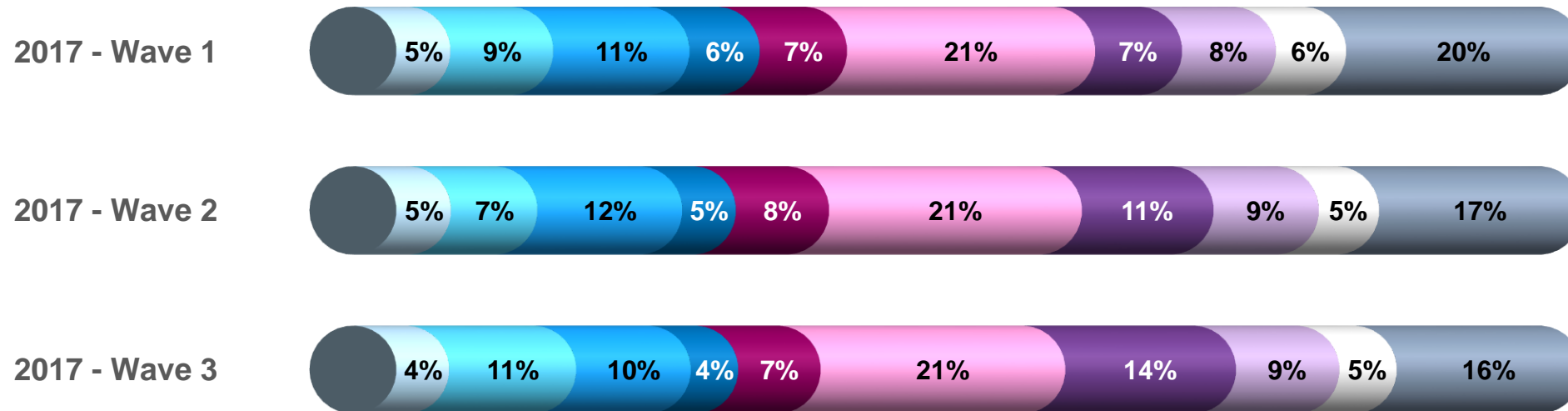
Key Radio Figures South - Average Rating (%) on ALL 18-44

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



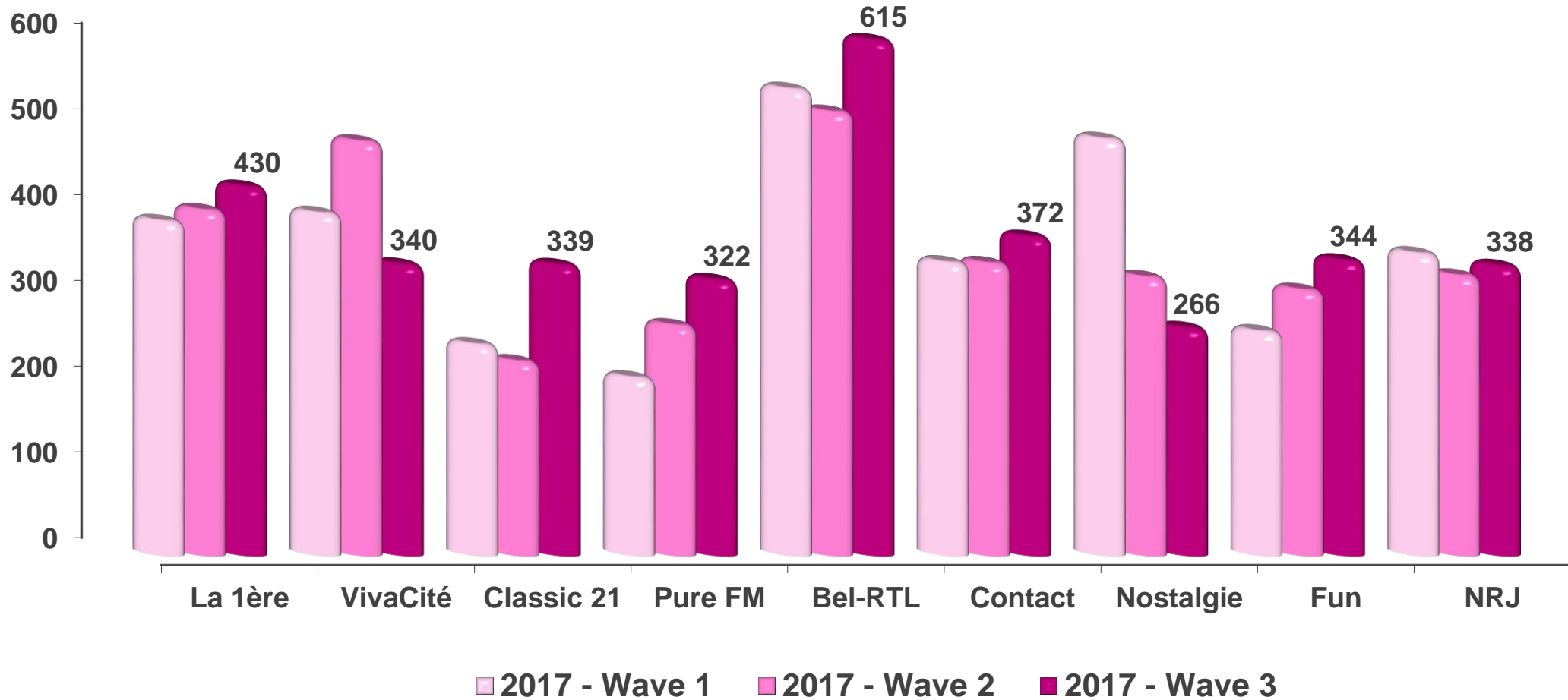
Key Radio Figures South - Audience Shares on ALL 18-44

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

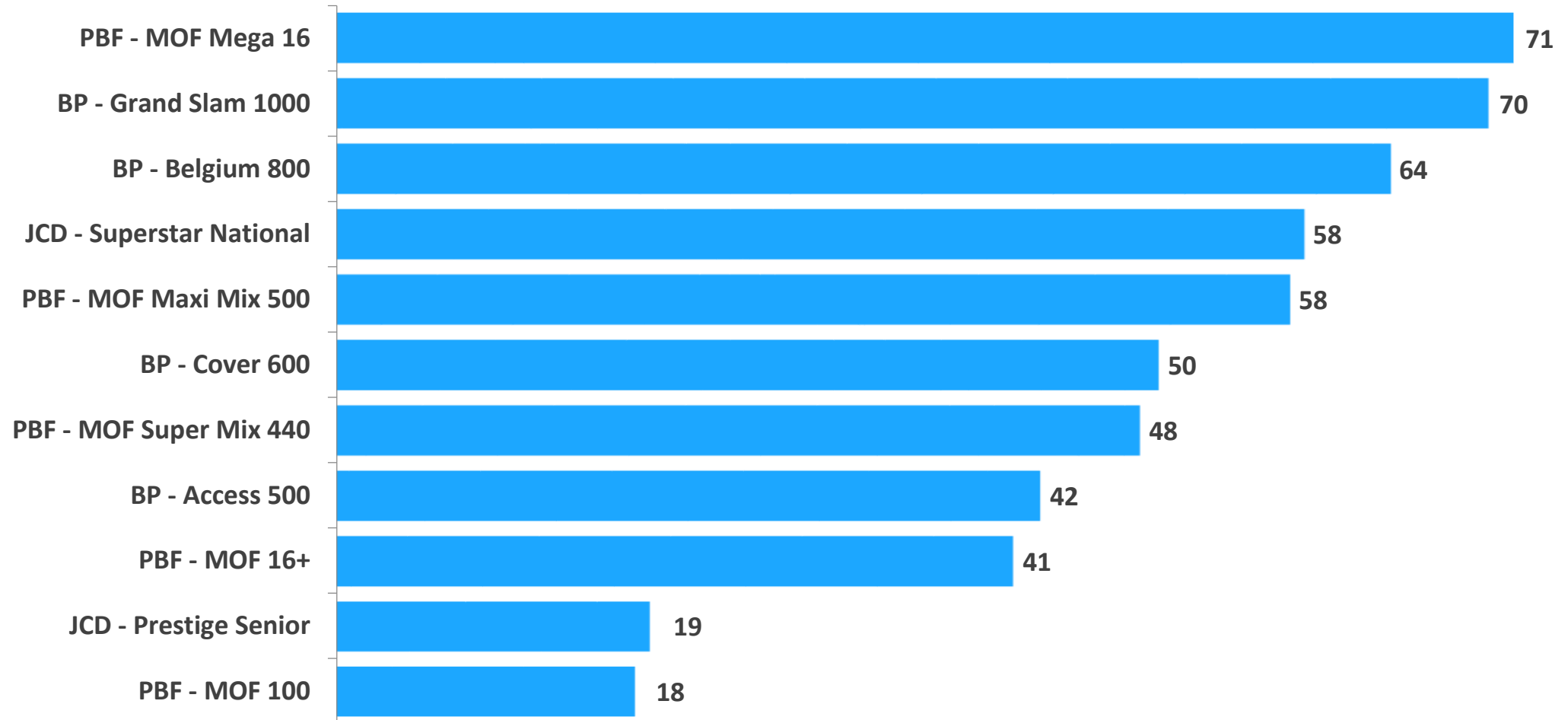


OOH ratings

Key OOH Figures - Panoramic & Classic billboards

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

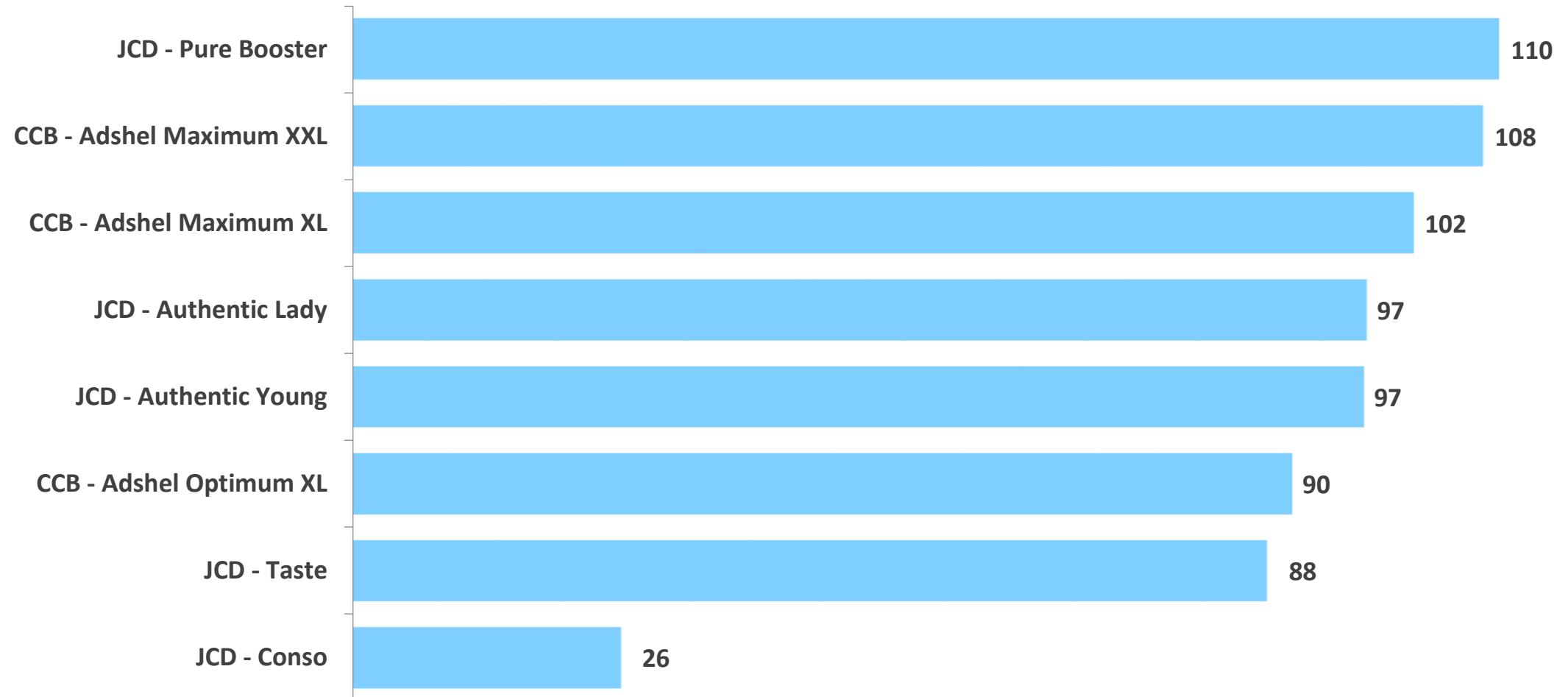
Source: CIM OOH 2017-01 / * : Visibility adjusted Rating Point



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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