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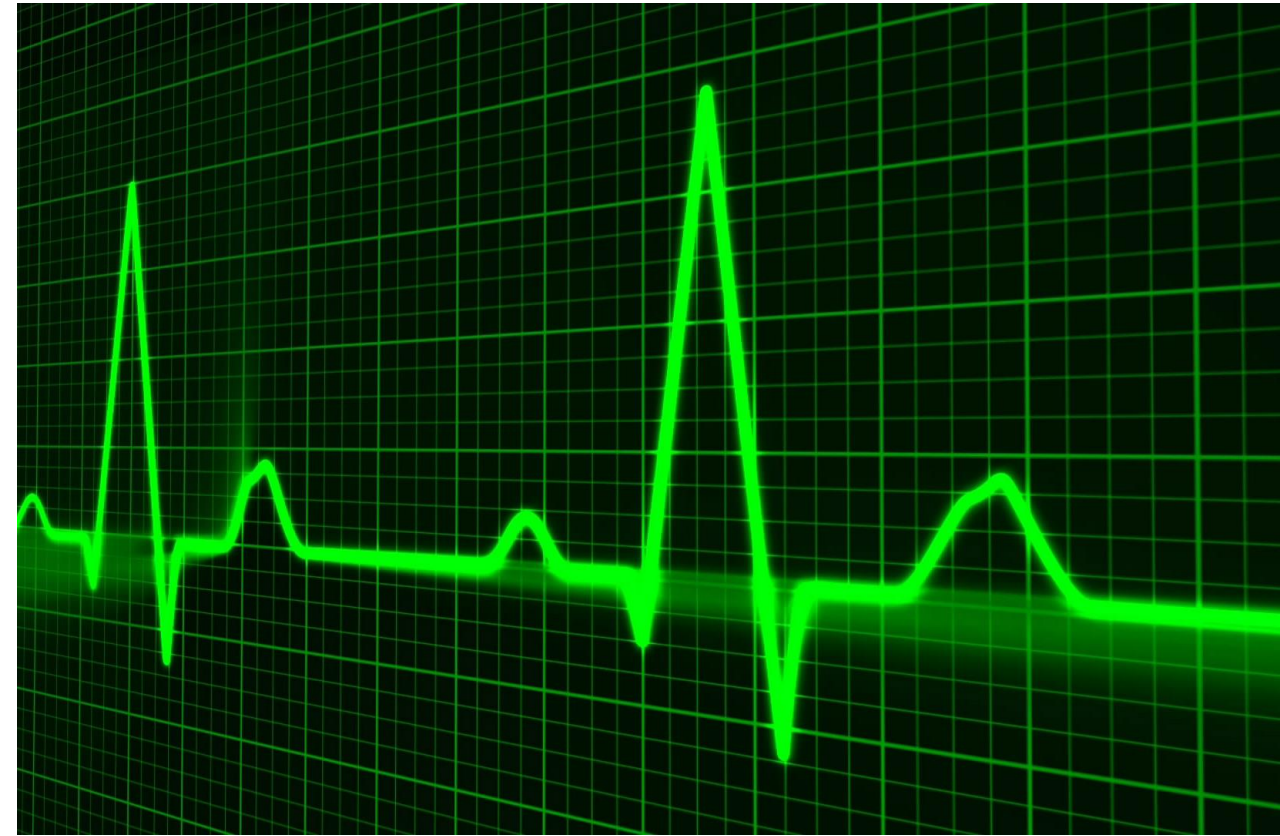
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

November 2018



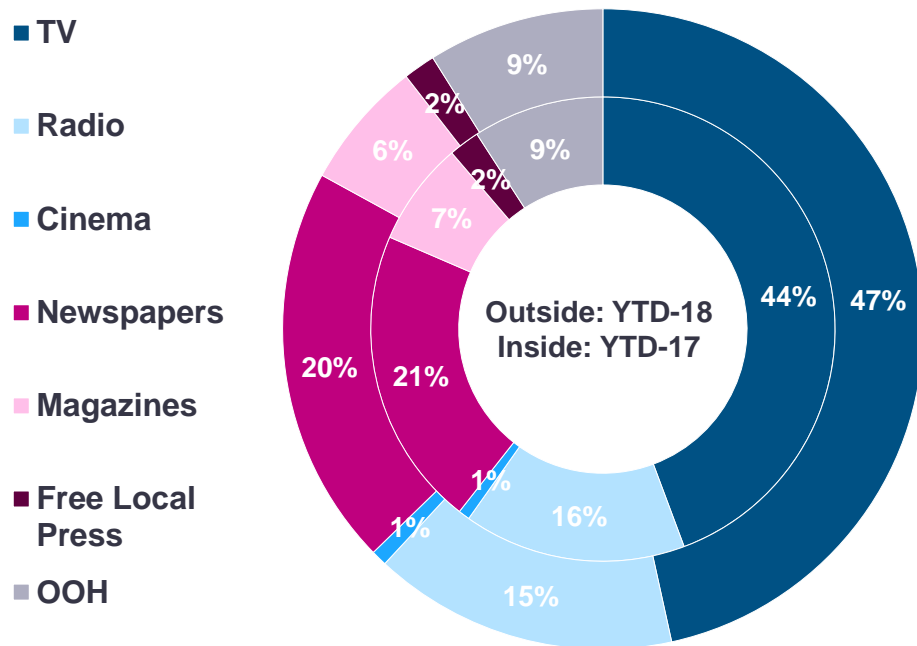
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Oct 2018

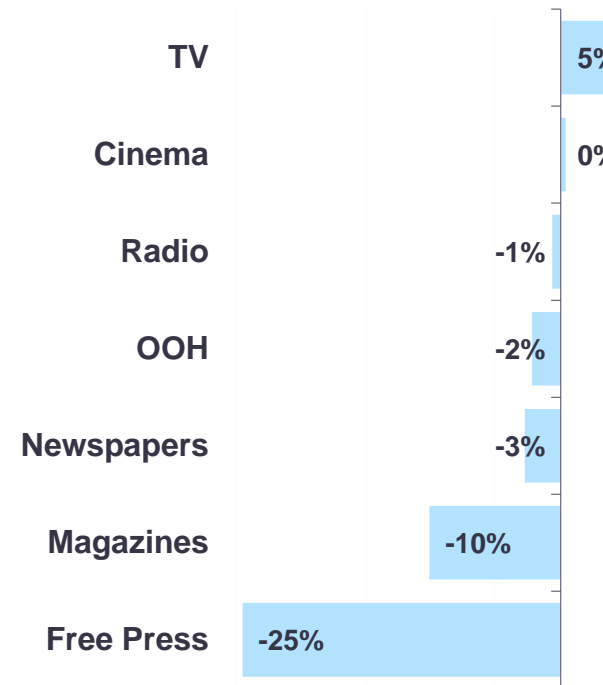
NB : Internet 2018 (declarative) figures are not published yet => internet is not included here !

Market	National	North	South
<ul style="list-style-type: none"> ▪ € Mo ▪ vs YTD-17 * ▪ % Region 	<ul style="list-style-type: none"> ▪ 3.005 ▪ + 0,1% ▪ 100% 	<ul style="list-style-type: none"> ▪ 1.797 ▪ - 0,5% ▪ 60% 	<ul style="list-style-type: none"> ▪ 1.208 ▪ + 1,2% ▪ 40%

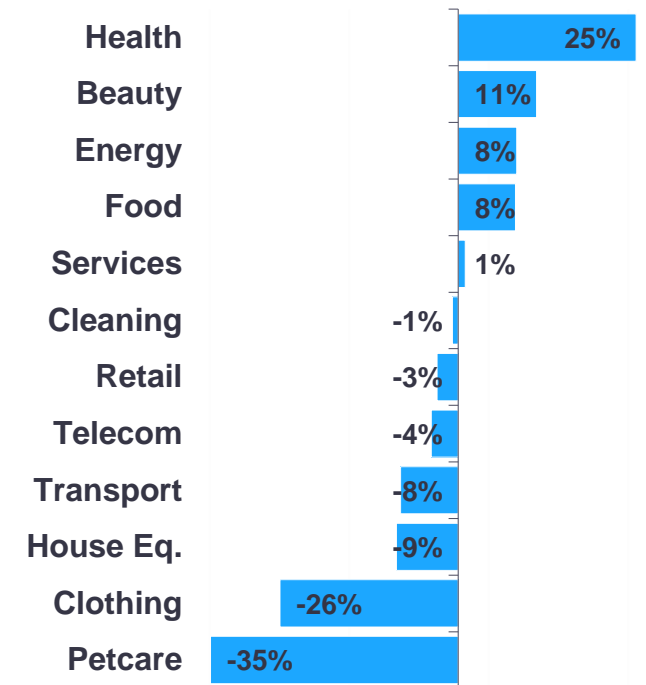
Media Mix Evol.



Media Evol. (vs YTD-17)



EcoGroups Evol. (vs YTD-17)



MDB TOP 30 ADVERTISERS - Jan-Oct 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	99,6	↑ 105
2	COCA-COLA COMPANY	70,4	↑ 147
3	D'IETEREN GROUP	65,7	↓ 98
4	RECKITT & BENCKISER	48,4	↓ 97
5	PROXIMUS GROUP	47,4	↑ 122
6	PSA GROUPE	47,0	↑ 139
7	UNILEVER	43,6	↓ 92
8	COLRUYT GROUP	33,1	↔ 101
9	RENAULT-NISSAN ALLIANCE	31,5	↓ 97
10	TELENET GROUP	30,0	↓ 82
11	ORANGE	29,9	↓ 93
12	L'OREAL GROUP	26,3	↑ 135
13	ANHEUSER BUSCH INBEV	25,3	↑ 170
14	FIAT CHRYSLER AUTOMOBILES	24,3	↓ 92
15	MONDELEZ INTERNATIONAL	23,9	↓ 98

Rank	ADV.GROUP	Gross Inv.	vs YTD-17
16	DANONE GROUP	23,3	↓ 98
17	BEIERSDORF	21,7	↑ 107
18	FERRERO	21,4	↑ 151
19	THE WALT DISNEY COMPANY	21,3	↑ 137
20	AHOLD DELHAIZE	20,2	↑ 102
21	LOTERIE NATIONALE	19,7	↓ 98
22	BNP-PARIBAS	18,1	↑ 105
23	DAIMLER BENZ GROUP	18,0	↓ 88
24	ALDI	17,7	↑ 348
25	CARREFOUR GROUP	17,6	↓ 81
26	ING GROUP	15,7	↑ 108
27	GLAXOSMITHKLINE	15,5	↓ 79
28	NETHYS	15,2	↓ 79
29	FORD MOTOR COMPANY	15,0	↑ 103
30	COLGATE-PALMOLIVE	14,9	↑ 126



Key TV figures

Key TV figures North - Nov-18

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Nov-18	YTD	Nov-18	YTD	Nov-18	YTD
VTM	PRP 18-54	7,8	6,6	25,5	24,4	1.117	974
Q2	PRP 18-44	2,2	1,9	8,1	8,1	911	886
VITAYA	PRP 18-54	1,6	1,3	5,3	4,8	857	827
CAZ	MEN 18-54	0,6	0,5	2,3	2,2	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	4,9	3,1	16,1	11,4	986	1.006
VIJF	PRP 18-54	1,5	1,6	4,8	5,9	966	786
ZES	PRP 18-54	0,6	0,6	2,1	2,3	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	30,4	26,8				
Total TV	PRP 18-44	26,7	23,9				
Total TV	MEN 18-54	24,8	22,4				

Key TV indexes North - Nov-18

CHANNEL	MARKETING TARGET	<u>RATING</u> vs P-1 17:00-23:00		<u>AUDIENCE SHARE</u> vs P-1 17:00-23:00		<u>C/GRP</u> vs Channel's Objective	
		Nov-18	YTD	Nov-18	YTD	Nov-18	YTD
VTM	PRP 18-54	↓ 97	↓ 94	↘ 99	↓ 96	✗ 114	✗ 110
Q2	PRP 18-44	↑ 108	↓ 95	↑ 111	↓ 95	✓ 100	✗ 107
VITAYA	PRP 18-54	↑ 116	↑ 103	↑ 118	↑ 106	✗ 107	✗ 113
CAZ	MEN 18-54	↑ 121	↓ 98	↑ 129	↘ 101	Package	Package
VIER	PRP 18-54	↑ 105	↓ 98	↑ 108	↘ 99	✓ 97	✗ 109
VIJF	PRP 18-54	↓ 98	↑ 105	→ 100	↑ 107	✗ 115	✗ 103
ZES	PRP 18-54	↑ 108	↑ 127	↑ 112	↑ 129	Package	Package
Total TV	PRP 18-54	↓ 98	↓ 98				
Total TV	PRP 18-44	↓ 98	↘ 99				
Total TV	MEN 18-54	↓ 94	↓ 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-15	YTD-16	YTD-17	YTD-18	18 vs 17
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	28,2%	27,9%	28,4%	28,1%	99
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	87,5%	85,8%	85,6%	83,0%	97
	VHS + DVD player + Blue Ray	"	3,8%	4,3%	4,0%	3,5%	87
	Video on demand + Digital recorder	"	5,6%	8,6%	9,2%	11,9%	130
	Game console and other devices (3)	"	0,8%	1,3%	1,3%	1,6%	125
% Time shift viewing (4)	All Channels	"	12,8%	17,9%	23,8%	26,0%	109
	Main Channels (5)	"	15,6%	21,9%	26,7%	30,4%	114
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	85	87	86	
	Main channels (5) - TSV	"	27	28	31	33	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	125	113	107	102	95
	All TV channels (TSV)	"	15	21	29	30	105
	All TV channels (Live + TSV)	"	139	134	136	132	97
	Other TV Screen Usage	"	27	29	31	36	116
	Total TV Screen Usage	"	167	163	166	168	101

Key TV figures South - Nov-18

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Nov-18	YTD	Nov-18	YTD	Nov-18	YTD
RTL-TVI	PRP 18-54	8,0	7,0	27,4	25,9	875	838
Club-RTL	MEN 18-54	1,6	1,5	7,2	7,0	1.012	868
Plug-RTL	ALL 15-34	0,6	0,6	3,8	4,0	868	921
La Une	PRP 18-54	3,7	3,8	12,5	14,0	714	722
La Deux	PRP 18-54	1,4	1,9	4,6	7,2	832	669
AB3	PRP 18-44	3,0	2,4	12,2	10,4	789	628
TF1	PRP 18-54	4,1	3,4	14,0	12,7	<i>Package</i>	<i>Package</i>
TTV	PRP 18-54	29,3	27,0				
TTV	PRP 18-44	24,4	23,1				
TTV	ALL 15-34	16,2	15,0				
TTV	MEN 18-54	22,8	21,1				

Key TV indexes South - Nov-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	
		Nov-18	YTD	Nov-18	YTD	Nov-18	YTD
RTL-TVI	PRP 18-54	↓ 91	↓ 91	↗ 101	↓ 97	✓ 100	✗ 113
Club-RTL	MEN 18-54	↗ 101	↗ 100	↑ 108	↑ 104	✗ 107	✗ 111
Plug-RTL	ALL 15-34	↓ 36	↓ 58	↓ 42	↓ 66	✓ 99	✗ 126
La Une	PRP 18-54	↓ 91	↘ 99	↗ 101	↑ 106	✓ 92	✗ 107
La Deux	PRP 18-54	↓ 70	↑ 124	↓ 78	↑ 133	✗ 110	✗ 112
AB3	PRP 18-44	↑ 106	↑ 104	↑ 123	↑ 112	✗ 105	✗ 102
TF1	PRP 18-54	↓ 91	↓ 80	↗ 100	↓ 85	Package	Package
TTV	PRP 18-54	↓ 91	↓ 93				
TTV	PRP 18-44	↓ 87	↓ 92				
TTV	ALL 15-34	↓ 86	↓ 88				
TTV	MEN 18-54	↓ 94	↓ 96				

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-15	YTD-16	YTD-17	YTD-18	18 vs 17
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	32,5%	33,4%	32,5%	31,4%	96
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	80,8%	80,8%	78,1%	75,1%	96
	VHS + DVD player + Blue Ray	"	7,8%	7,0%	7,0%	6,3%	91
	Video on demand + Digital recorder	"	7,1%	11,4%	14,2%	17,8%	126
	Game console and other devices (3)	"	1,1%	0,9%	0,8%	0,8%	99
% Time shift viewing (4)	All Channels	"	8,9%	13,3%	18,7%	20,4%	109
	Main Channels (5)	"	10,0%	14,4%	20,2%	20,9%	103
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	89	89	88	84	
	Main channels (5) - TSV	"	47	52	52	50	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	159	157	138	126	91
	All TV channels (TSV)	"	13	20	27	26	97
	All TV channels (Live + TSV)	"	172	177	165	152	92
	Other TV Screen Usage	"	49	51	54	59	109
	Total TV Screen Usage	"	221	227	220	212	96



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-18

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.135.712	11	Gazet van Antwerpen	274.956
2	Nieuwsblad	993.452	12	Le Soir	214.181
3	2dehands.be-2ememain.be	577.350	13	Immoweb	213.935
4	SudInfo	349.475	14	Het Belang van Limburg	194.610
5	De Standaard	327.113	15	Knack-Le Vif	186.897
6	VRT	314.284	16	De Morgen	162.867
7	RTBF.be	296.393	17	La Libre.be	138.863
8	Sporza	291.873	18	7sur7.be	133.287
9	DH.be	279.125	19	VTM	129.665
10	RTL.be	276.029	20	L'Avenir.net	124.261

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

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

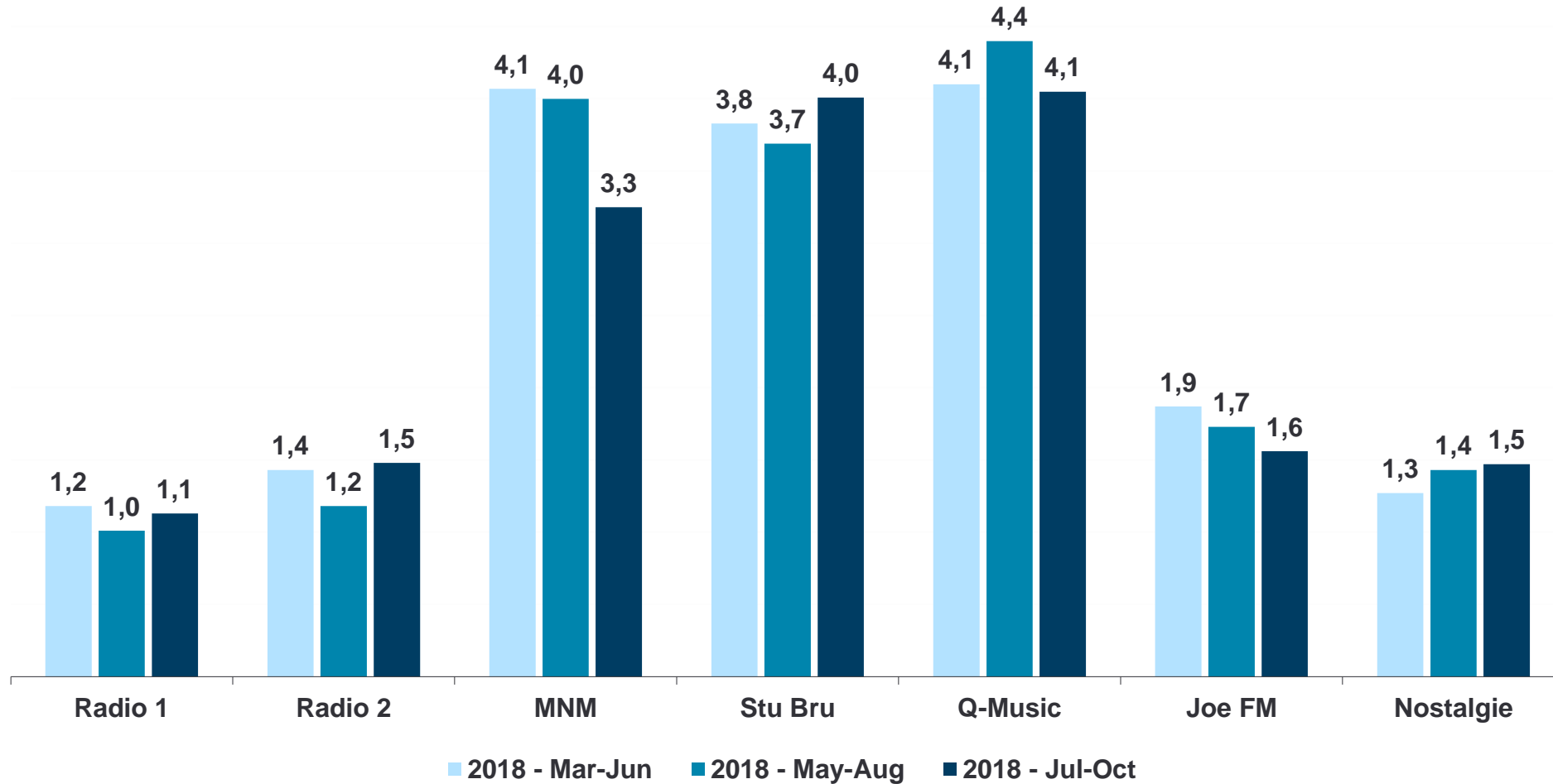
Website	Daily Visitors (000)
MSN.COM	1.022
GOOGLE.BE	1.012
MSN.BE	866
FACEBOOK.COM	657
LINKEDIN.COM	630
LIVE.COM	615
GOOGLE.COM	433
BING.COM	365
YOUTUBE.COM	327
YAHOO.COM	265



Key Radio figures

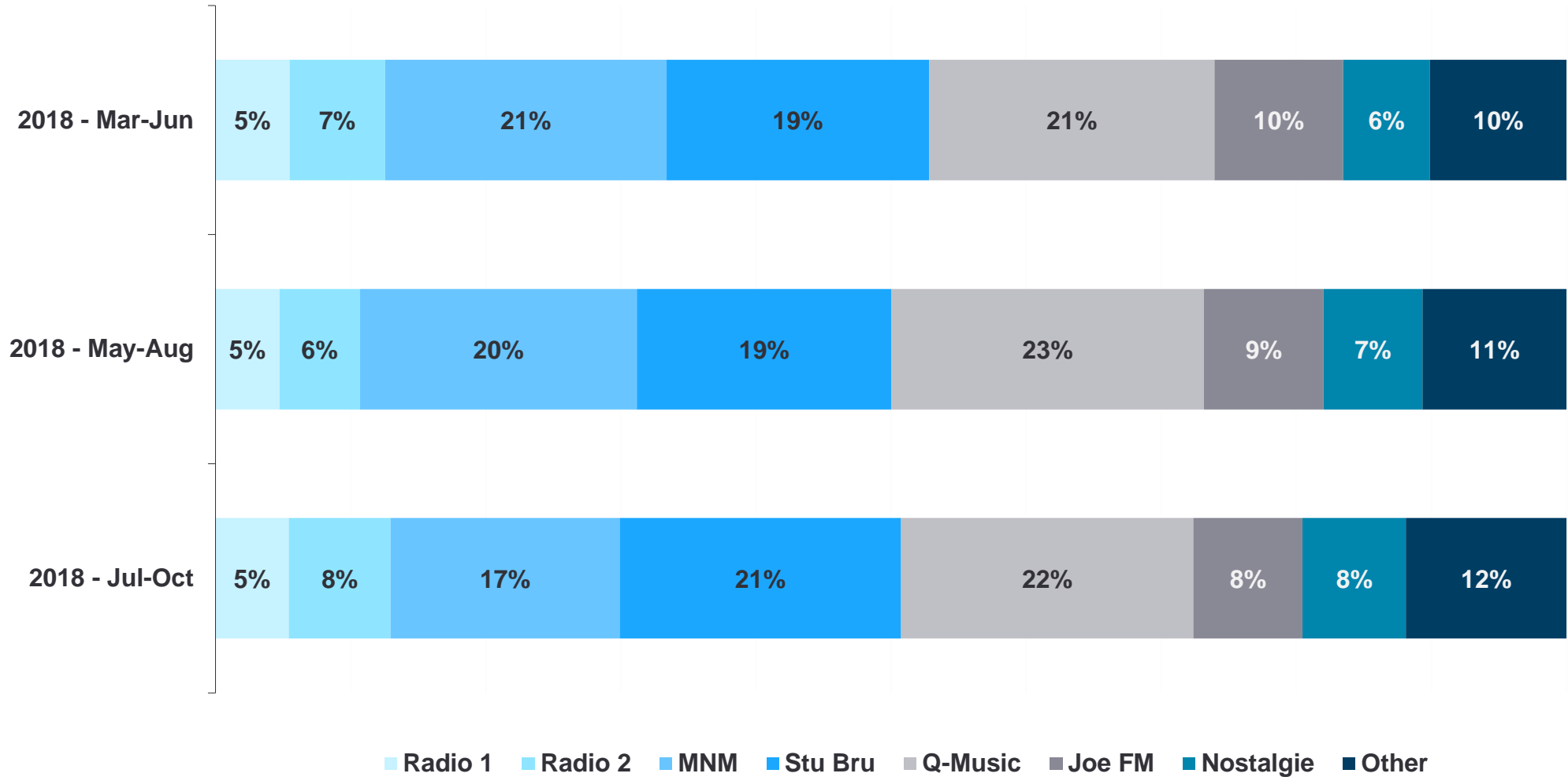
KEY RADIO FIGURES NORTH

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



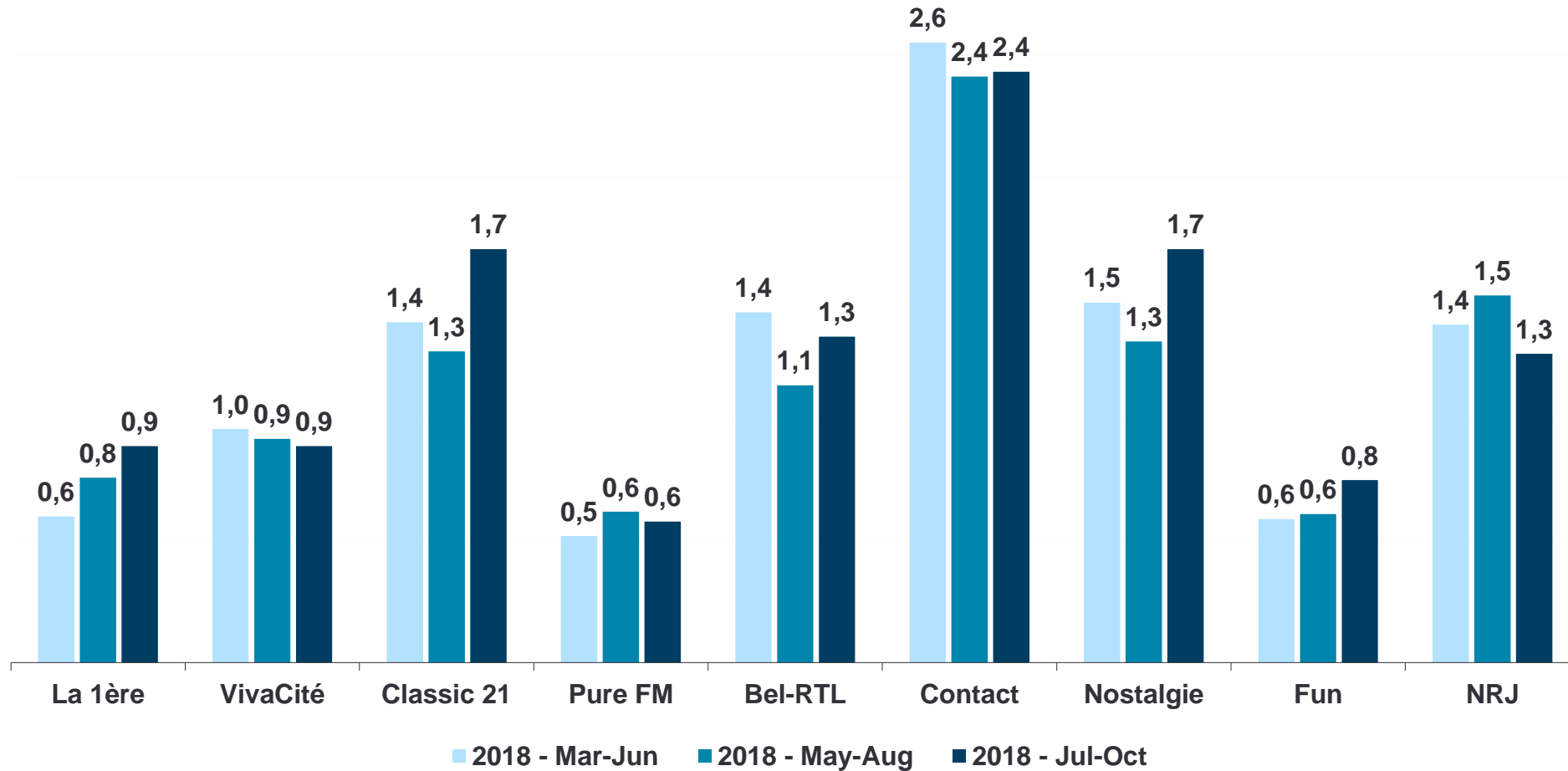
KEY RADIO FIGURES NORTH

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



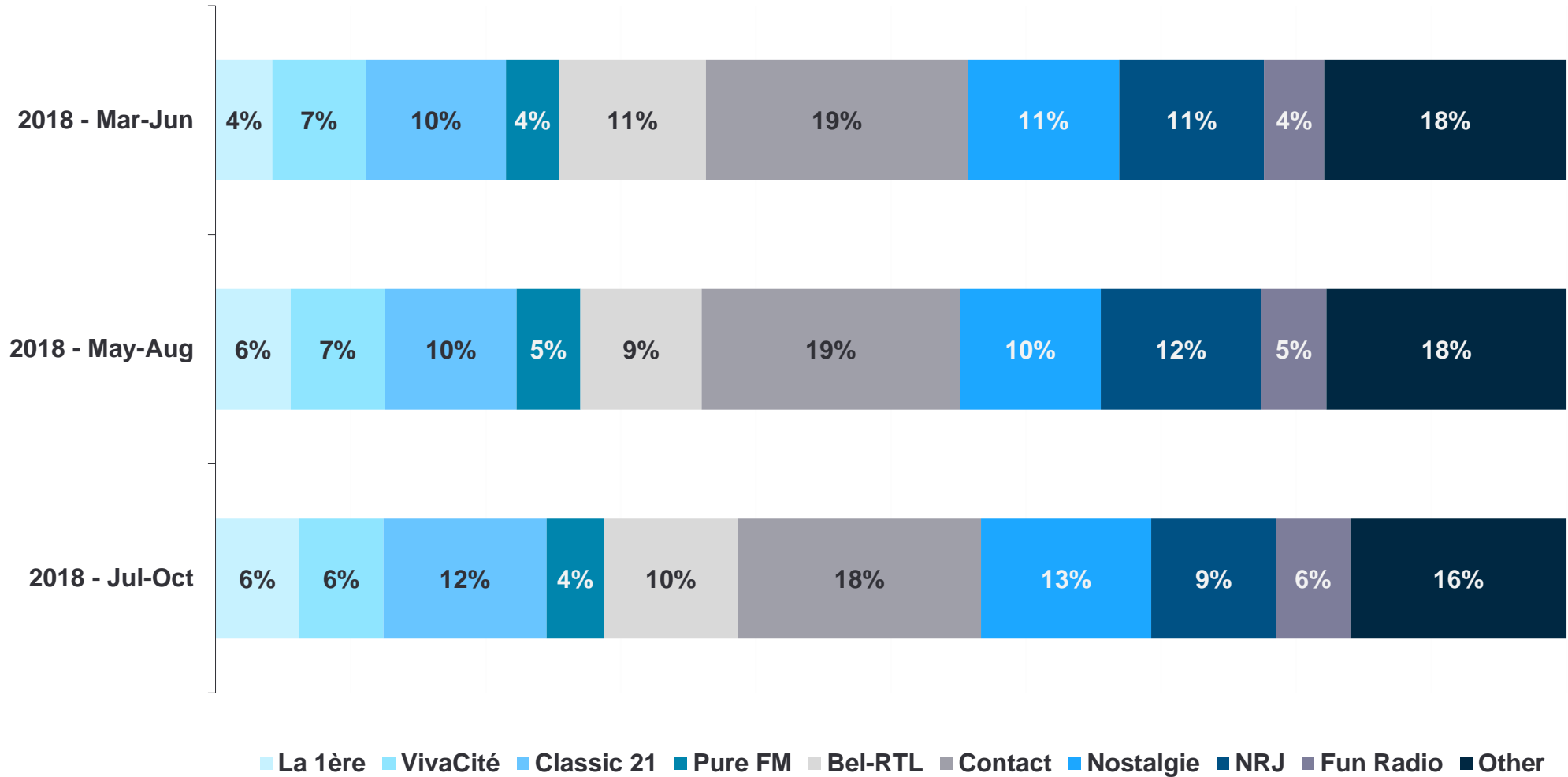
KEY RADIO FIGURES SOUTH

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%

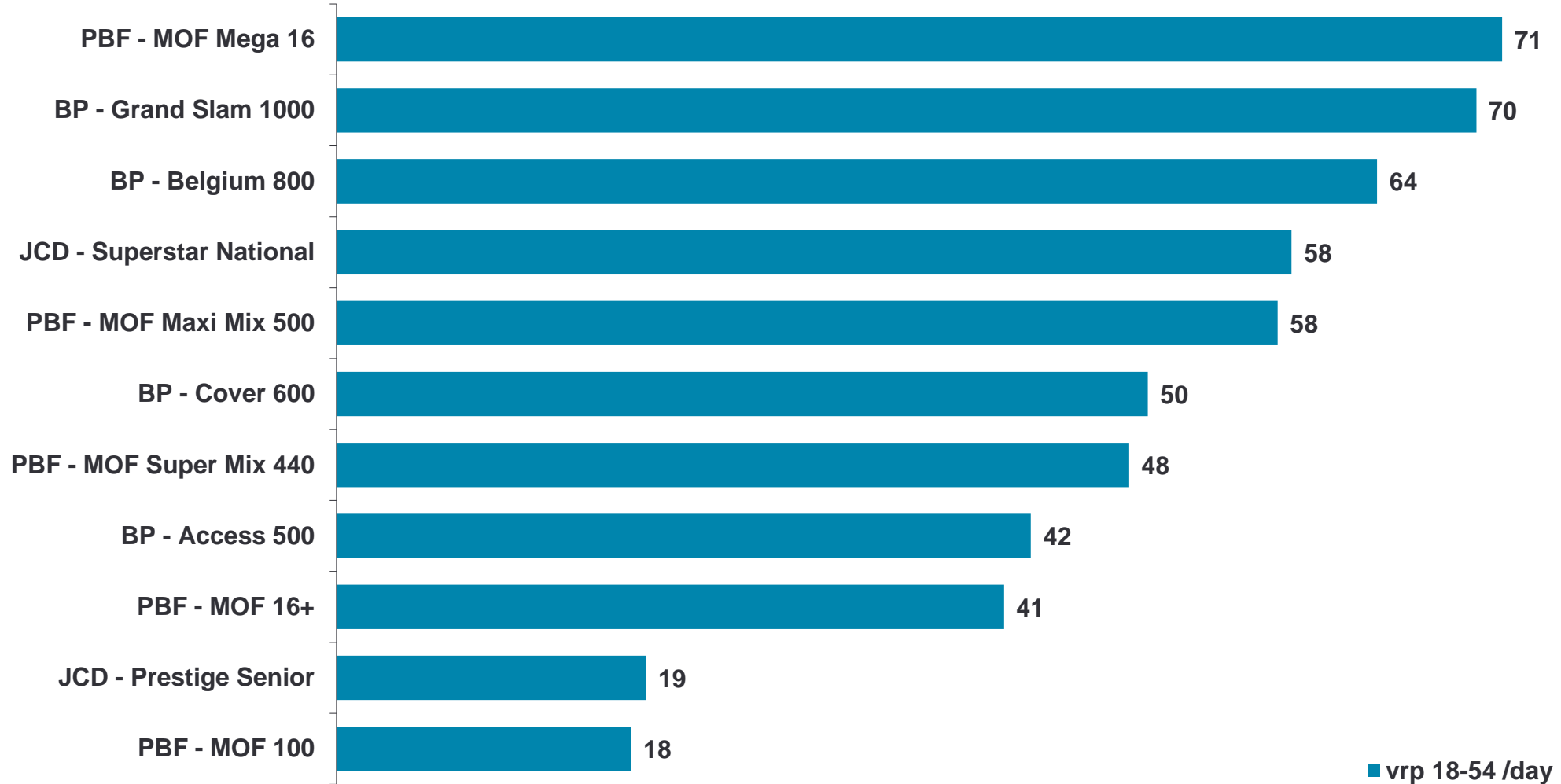
Key Print Figures - Magazines Circulation - Year 2017 (Paid + Free - digital sales included)

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

