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CONNECTIONS AGENCY

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Gross Media Investments Evolution

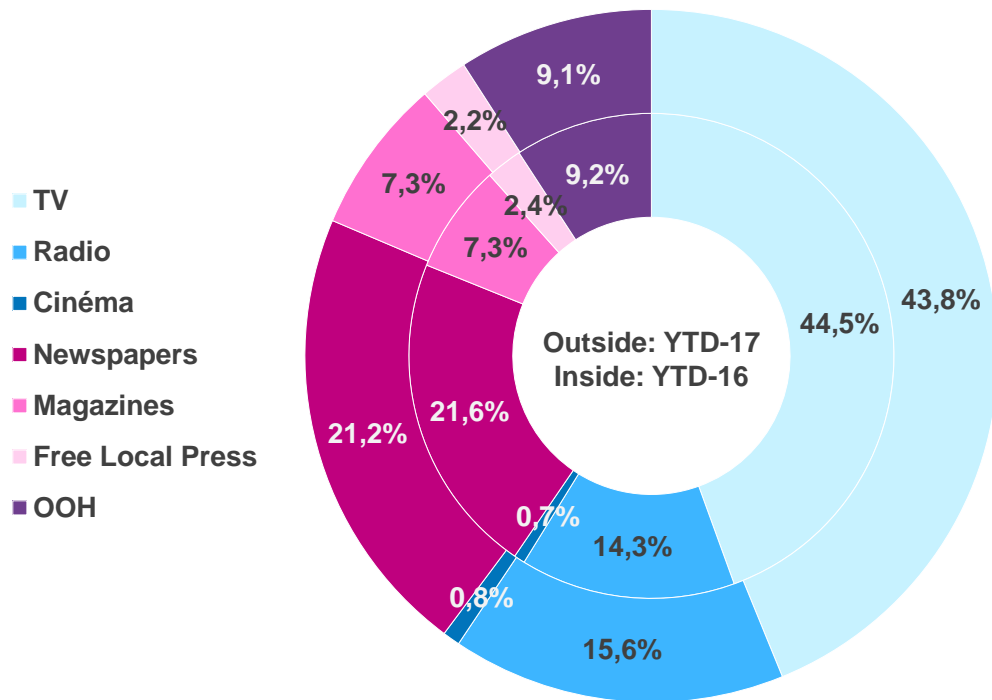
GROSS MEDIA INVESTMENTS EVOLUTION

Jan-Sep 2017

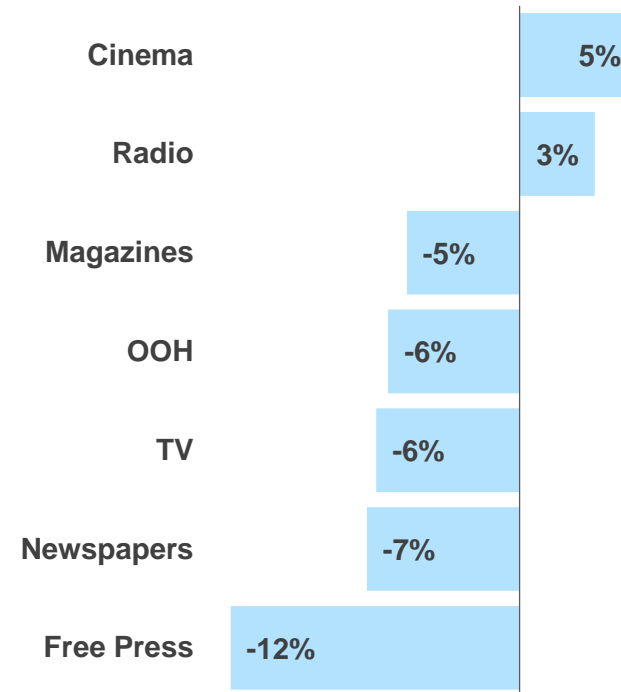
Source: MDB / Nielsen

Market	National	North	South
<ul style="list-style-type: none"> • € Mo • vs YTD-16 * • % Region 	<ul style="list-style-type: none"> • 2.577,0 • - 4,9% • 100% 	<ul style="list-style-type: none"> • 1.550,7 • - 6,5% • 60% 	<ul style="list-style-type: none"> • 1.026,3 • - 2,3% • 40%

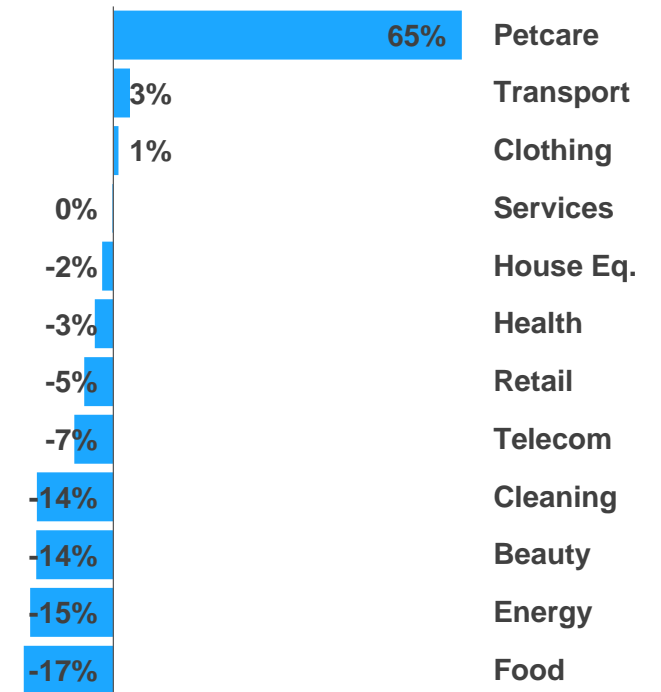
Media Mix Evol.



Media Evol. (vs YTD-16)



Ecogroups Evol. (vs YTD-16)



NB : Internet figures 2017 are not reliable (confirmed by Nielsen) => internet is not included here !

MDB TOP 30 ADVERTISERS - Jan-Sep 2017

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

Rank	ADV.GROUP	Gross Inv.	vs YTD-16 *	Rank	ADV.GROUP	Gross Inv.	vs YTD-16 *
1	PROCTER & GAMBLE	82,8	↓ 90	16	DAIMLER BENZ GROUP	19,6	↑ 112
2	D'IETEREN GROUP	57,8	↓ 97	17	BMW GROUP	19,4	↑ 124
3	RECKITT & BENCKISER	44,7	↓ 77	18	CARREFOUR GROUP	19,4	↓ 82
4	COCA-COLA COMPANY	43,3	↓ 95	19	GLAXOSMITHKLINE	17,3	↑ 125
5	UNILEVER	38,6	↓ 67	20	L'OREAL GROUP	17,3	↓ 73
6	PROXIMUS GROUP	35,4	↓ 76	21	BEIERSDORF	17,1	↓ 91
7	PSA PEUGEOT CITROEN	30,6	↑ 106	22	LOTERIE NATIONALE	16,9	↔ 99
8	RENAULT-NISSAN ALLIANCE	29,6	↓ 95	23	NETHYS	16,6	↓ 87
9	ORANGE	28,7	↓ 93	24	AHOLD DELHAIZE	16,4	↓ 69
10	TELENET GROUP	28,7	↓ 96	25	BNP-PARIBAS	15,0	↑ 176
11	COLRUYT GROUP	26,8	↑ 113	26	LIDL & CO	14,9	↓ 89
12	MONDELEZ INTERNATIONAL	23,0	↓ 97	27	GENERAL MOTORS CORP.	14,2	↓ 88
13	FIAT CHRYSLER AUTOMOBILES	22,2	↑ 148	28	NESTLE GROUP	13,8	↓ 62
14	DANONE GROUP	21,0	↓ 59	29	ING GROUP	13,1	↓ 83
15	TRIVAGO	20,0	↑ 133	30	BELFIUS	11,6	↓ 69

NB : Internet figures 2017 are not reliable (confirmed by Nielsen) => internet is not included here !



Key TV Figures

Key TV figures North - Oct-17

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	
		Oct-17	YTD	Oct-17	YTD	Oct-17	YTD
VTM	PRP 18-54	7,6	6,8	25,5	25,4	1.196	877
Q2	PRP 18-44	2,0	2,1	7,7	8,6	1.122	822
VITAYA	PRP 18-54	1,3	1,2	4,3	4,5	937	763
VIER	PRP 18-54	4,5	3,0	15,0	11,0	1.121	953
VIJF	PRP 18-54	1,7	1,5	5,6	5,6	911	697
Total TV	PRP 18-54	29,7	26,9				
Total TV	PRP 18-44	26,3	23,9				

Key TV indexes North - Oct-17

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Oct-17 vs P-1	YTD	Oct-17 vs P-1	YTD	Oct-17 vs Channel's Objective	YTD
VTM	PRP 18-54	↑ 107	↑ 104	↑ 103	↑ 102	✗ 115	! 101
Q2	PRP 18-44	↑ 106	↓ 96	↑ 105	↓ 96	✗ 113	✗ 102
VITAYA	PRP 18-54	↑ 126	↑ 114	↑ 122	↑ 113	✗ 108	✗ 107
VIER	PRP 18-54	↑ 104	↓ 96	↔ 101	↓ 95	✗ 104	✗ 106
VIJF	PRP 18-54	↑ 104	↑ 106	↔ 101	↑ 104	✓ 99	✓ 94
Total TV	PRP 18-54	↑ 103	↔ 101				
Total TV	PRP 18-44	↔ 101	→ 100				

Time Shift Viewing & Other TV Screen Usage - NORTH

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

Source: CIM TV - Live +6 including guests (2014-2015) / Live +7 including guests (2016+)

Variable	Channel	Daypart	YTD-14	YTD-15	YTD-16	YTD-17	17 vs 16
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	28,5%	27,9%	27,5%	28,1%	102
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	89,0%	87,5%	85,6%	85,5%	100
	VHS + DVD player + Blue Ray	"	3,2%	3,8%	4,4%	4,1%	92
	Video on demand + Digital recorder	"	6,4%	6,2%	8,7%	9,2%	105
	Game console and other devices (3)	"	1,5%	0,8%	1,3%	1,3%	102
% Time shift viewing (4)	All Channels	"	10,4%	12,5%	17,2%	23,6%	137
	Main Channels (5)	"	13,9%	15,3%	21,4%	26,6%	124
Commercial breaks rating vs full daypart rating	Main channels (5) - Live	"	87	88	86	87	
	Main channels (5) - TSV	"	24	27	28	30	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	131	124	112	106	95
	All TV channels (TSV)	"	12	14	20	28	141
	All TV channels (Live + TSV)	"	143	138	132	134	102
	Other TV Screen Usage	"	23	27	29	31	105
	Total TV Screen Usage	"	167	165	161	165	102

(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 - Oct-17

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	
		Oct-17	YTD	Oct-17	YTD	Oct-17	YTD
RTL-TVI	PRP 18-54	8,5	7,6	27,2	26,6	993	790
Club-RTL	MEN 18-54	1,6	1,5	6,8	6,7	1.094	866
Plug-RTL	ALL 15-34	1,7	0,9	9,0	5,6	768	759
La Une	PRP 18-54	3,9	3,8	12,5	13,3	842	685
La Deux	PRP 18-54	1,5	1,5	4,9	5,3	727	570
AB3	PRP 18-44	2,5	2,3	9,2	9,2	628	586
TF1	PRP 18-54	4,1	4,3	13,1	14,9	1.063	951
TTV	PRP 18-54	31,2	28,6				
TTV	PRP 18-44	27,2	24,7				
TTV	ALL 15-34	18,5	16,8				
TTV	MEN 18-54	23,6	21,8				

Key TV indexes South - Oct-17

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Oct-17 vs P-1	YTD	Oct-17 vs P-1	YTD	Oct-17 vs Channel's Objective	YTD
RTL-TVI	PRP 18-54	↑ 105	↓ 94	↑ 108	↑ 102	× 110	× 105
Club-RTL	MEN 18-54	→ 100	↗ 101	→ 100	↑ 107	× 115	× 107
Plug-RTL	ALL 15-34	↑ 113	↓ 76	↑ 114	↓ 85	✓ 89	× 103
La Une	PRP 18-54	↓ 91	↓ 88	↓ 93	↓ 94	× 103	× 108
La Deux	PRP 18-54	↓ 92	↓ 73	↓ 94	↓ 79	× 102	× 102
AB3	PRP 18-44	↓ 93	↓ 91	↓ 98	↗ 101	✓ 84	✓ 100
TF1	PRP 18-54	↓ 79	↓ 86	↓ 81	↓ 93	× 107	× 109
TTV	PRP 18-54	↓ 97	↓ 93				
TTV	PRP 18-44	↓ 95	↓ 90				
TTV	ALL 15-34	↘ 99	↓ 90				
TTV	MEN 18-54	→ 100	↓ 94				

Time Shift Viewing & Other TV Screen Usage - SOUTH

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

Source: CIM TV - Live +6 including guests (2014-2015) / Live +7 including guests (2016+)

Variable	Channel	Daypart	YTD-14	YTD-15	YTD-16	YTD-17	17 vs 16
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	31,7%	32,0%	33,0%	32,2%	97
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	82,1%	80,9%	80,8%	78,1%	97
	VHS + DVD player + Blue Ray	"	5,4%	7,9%	7,0%	7,1%	101
	Video on demand + Digital recorder	"	10,0%	7,9%	11,3%	14,1%	124
	Game console and other devices (3)	"	2,5%	1,1%	0,8%	0,7%	88
% Time shift viewing (4)	All Channels	"	8,3%	8,7%	13,1%	18,4%	140
	Main Channels (5)	"	9,0%	9,7%	14,2%	20,1%	141
Commercial breaks rating vs full daypart rating	Main channels (5) - Live	"	88	90	88	89	
	Main channels (5) - TSV	"	44	45	53	51	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	158	157	156	138	89
	All TV channels (TSV)	"	11	12	20	26	134
	All TV channels (Live + TSV)	"	169	170	175	164	94
	Other TV Screen Usage	"	45	48	50	54	107
	Total TV Screen Usage	"	214	218	225	218	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 - Oct-17

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

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.125.747	11	Immoweb	224.976
2	Nieuwsblad	1.084.614	12	Le Soir	223.432
3	2dehands.be-2ememain.be	536.070	13	Knack-LeVif	208.401
4	SudInfo	363.155	14	Het Belang van Limburg	205.839
5	De Standaard	362.576	15	RTL.be	196.440
6	Gazet van Antwerpen	299.019	16	VTM	168.512
7	VRT	295.993	17	De Morgen	156.632
8	RTBF.be	244.705	18	L'Avenir.net	140.424
9	Sporza	237.541	19	7sur7.be	132.134
10	DH.be	231.915	20	La Libre.be	131.439

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

Source: COMSCORE

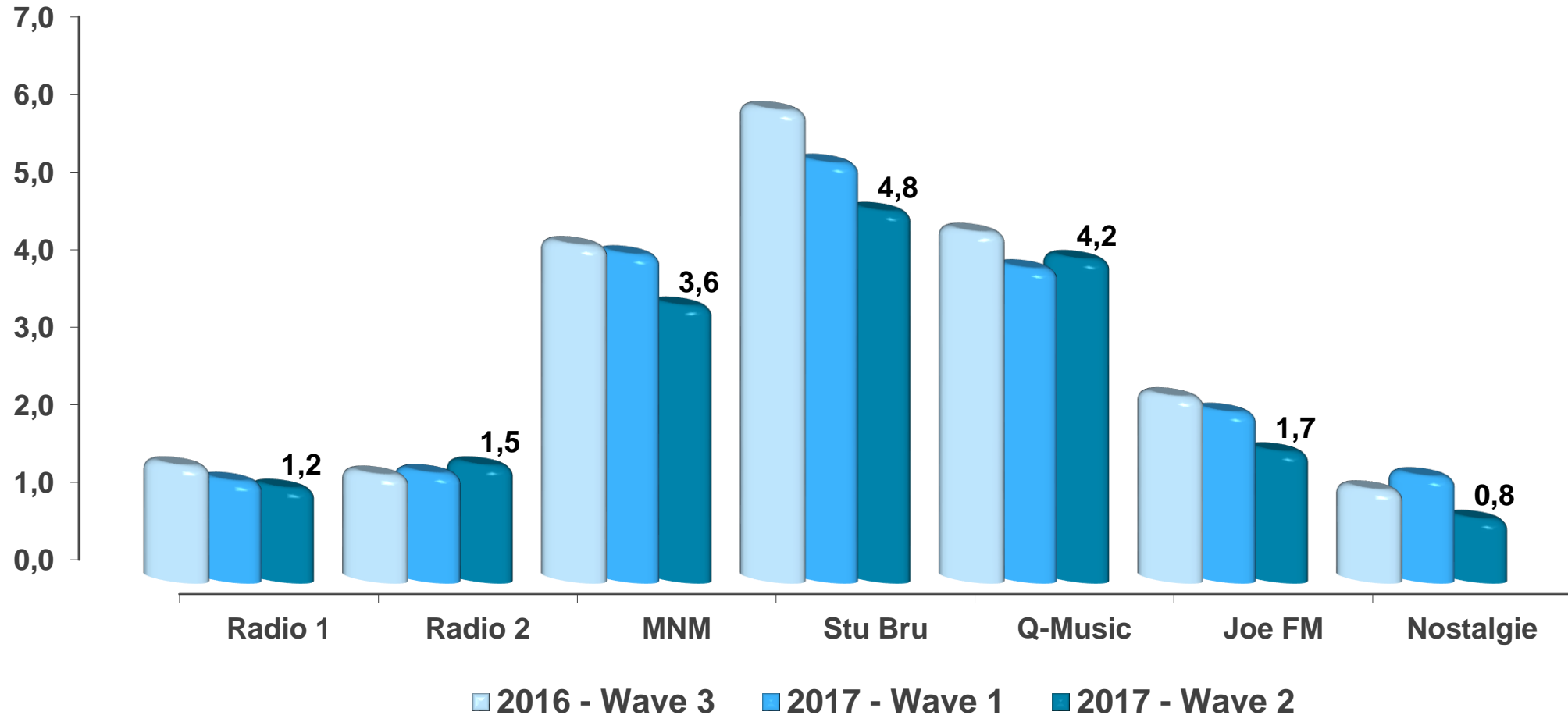
Website	Daily Visitors (000)
MSN.COM	1.093
GOOGLE.BE	1.057
MSN.BE	904
LINKEDIN.COM	784
FACEBOOK.COM	751
LIVE.COM	673
GOOGLE.COM	513
BING.COM	390
YOUTUBE.COM	281
YAHOO.COM	222



Key Radio Figures

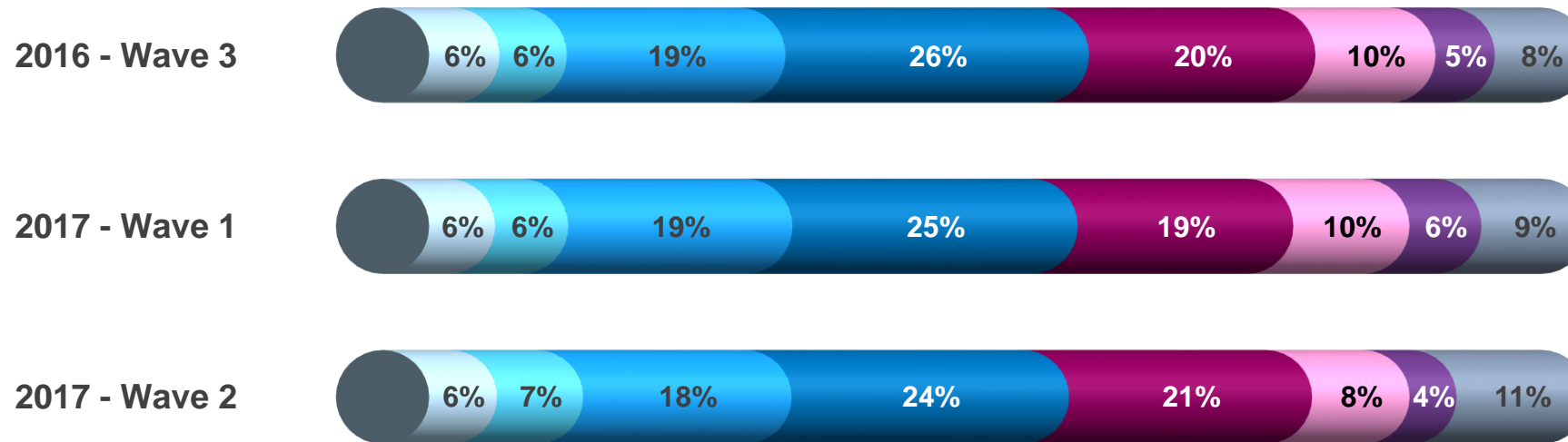
Key Radio Figures North - Average Rating (%) on ALL 18-44

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)

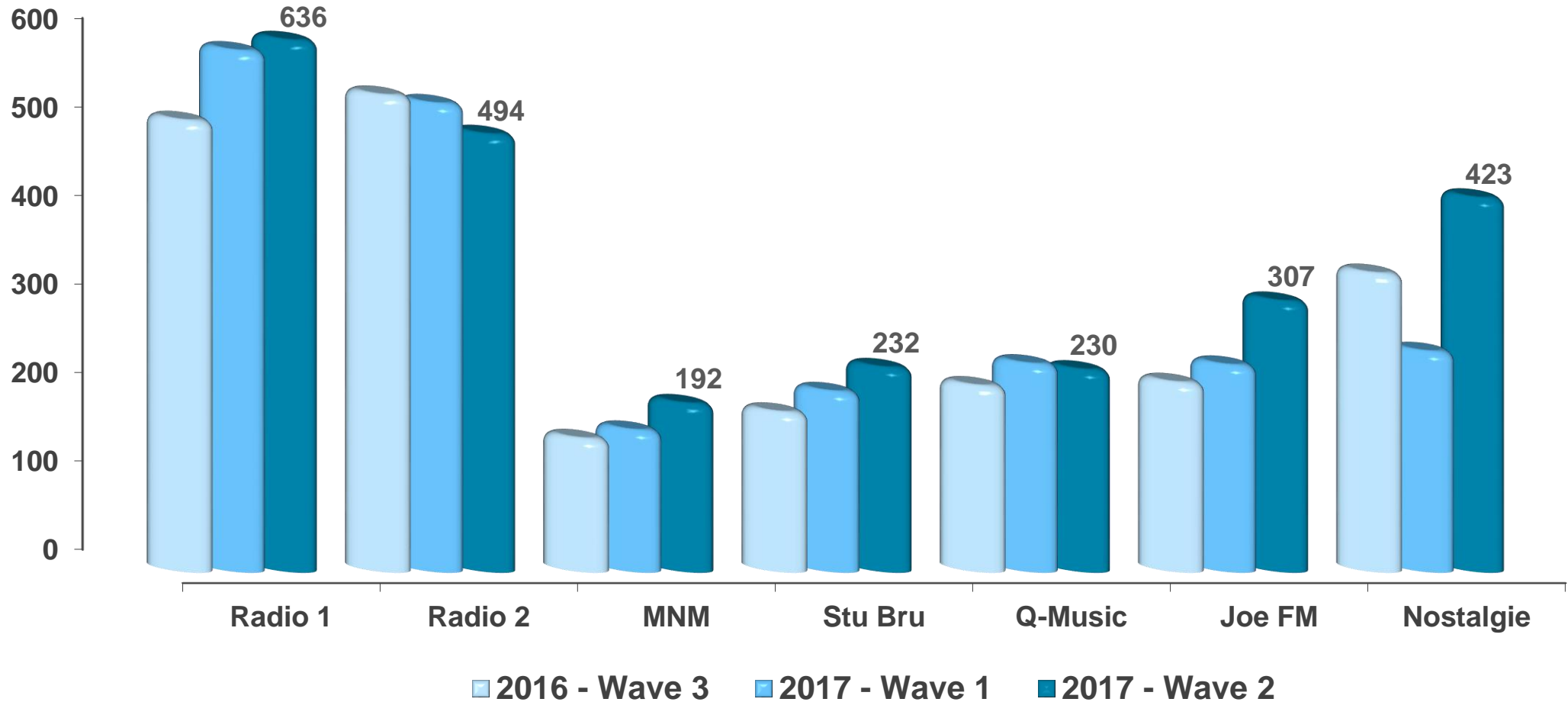


■ Radio 1 ■ Radio 2 ■ MNM ■ Stu Bru
■ Q-Music ■ Joe FM ■ Nostalgie ■ Other

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

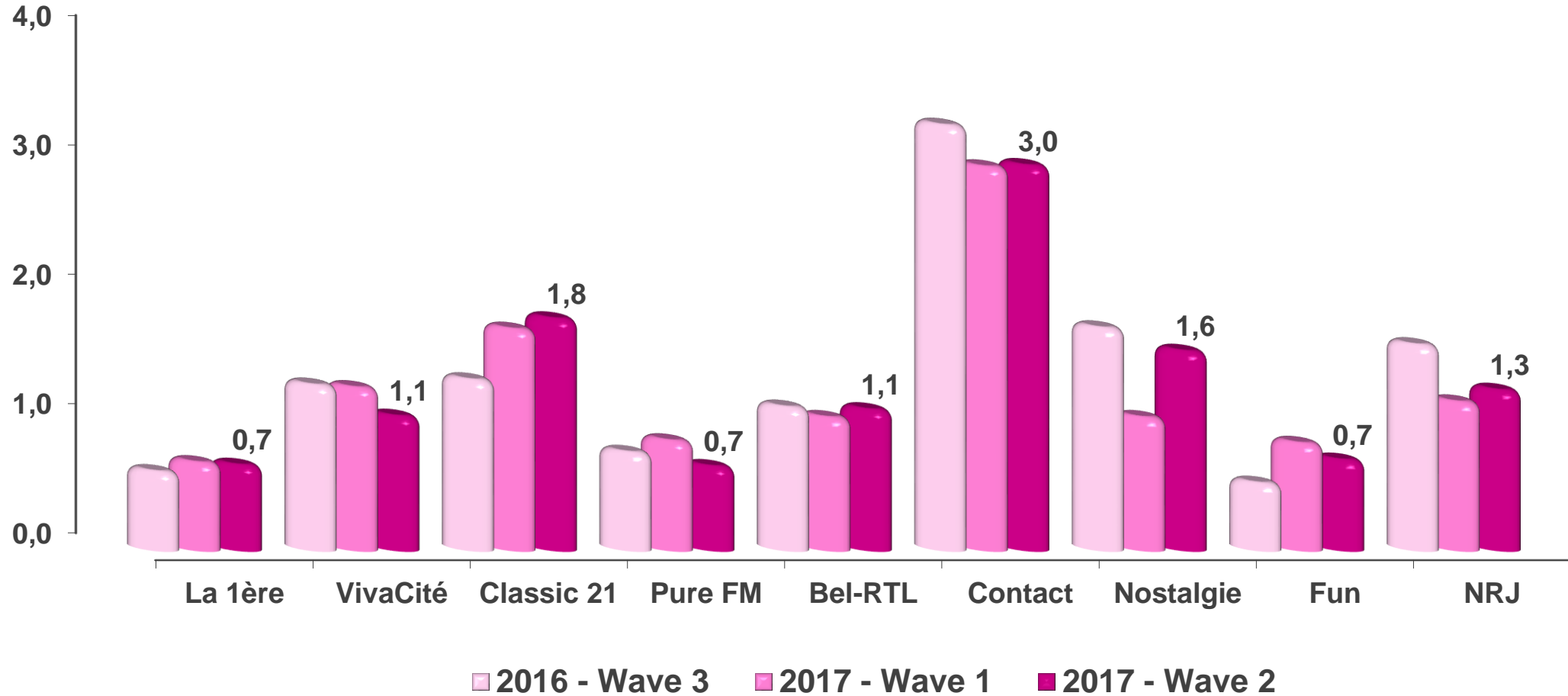
Source: CIM Radio (07:00-19:00/Average Break)

* : no agency commission



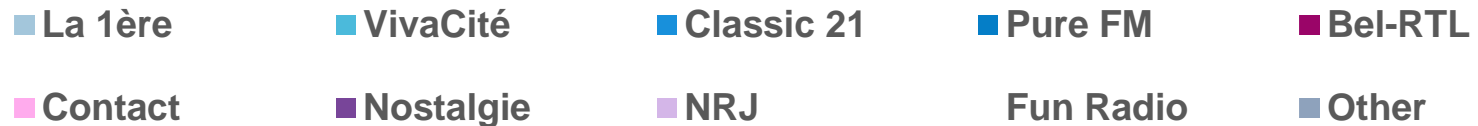
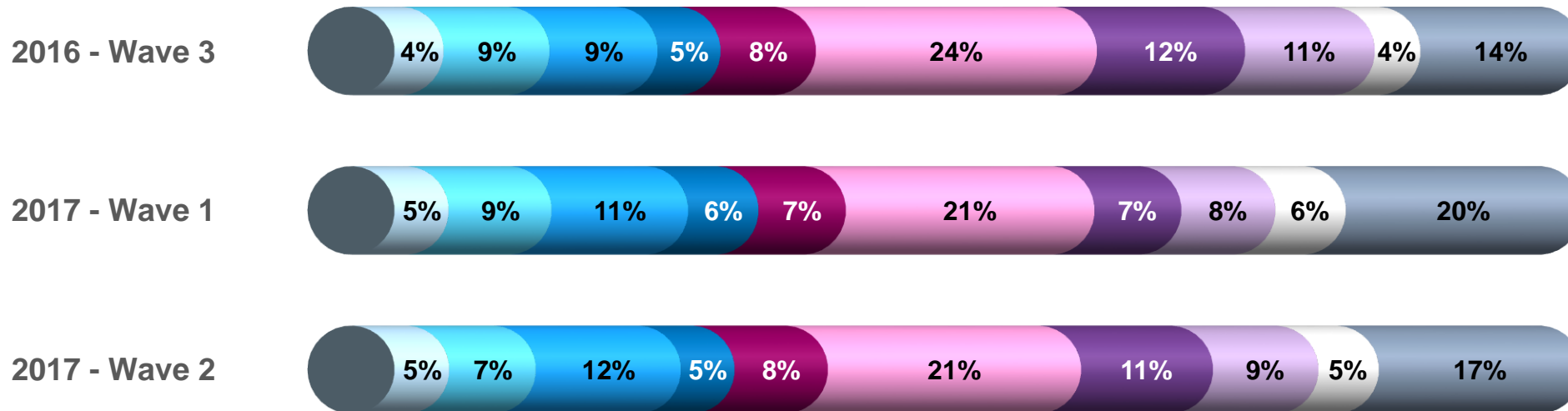
Key Radio Figures South - Average Rating (%) on ALL 18-44

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



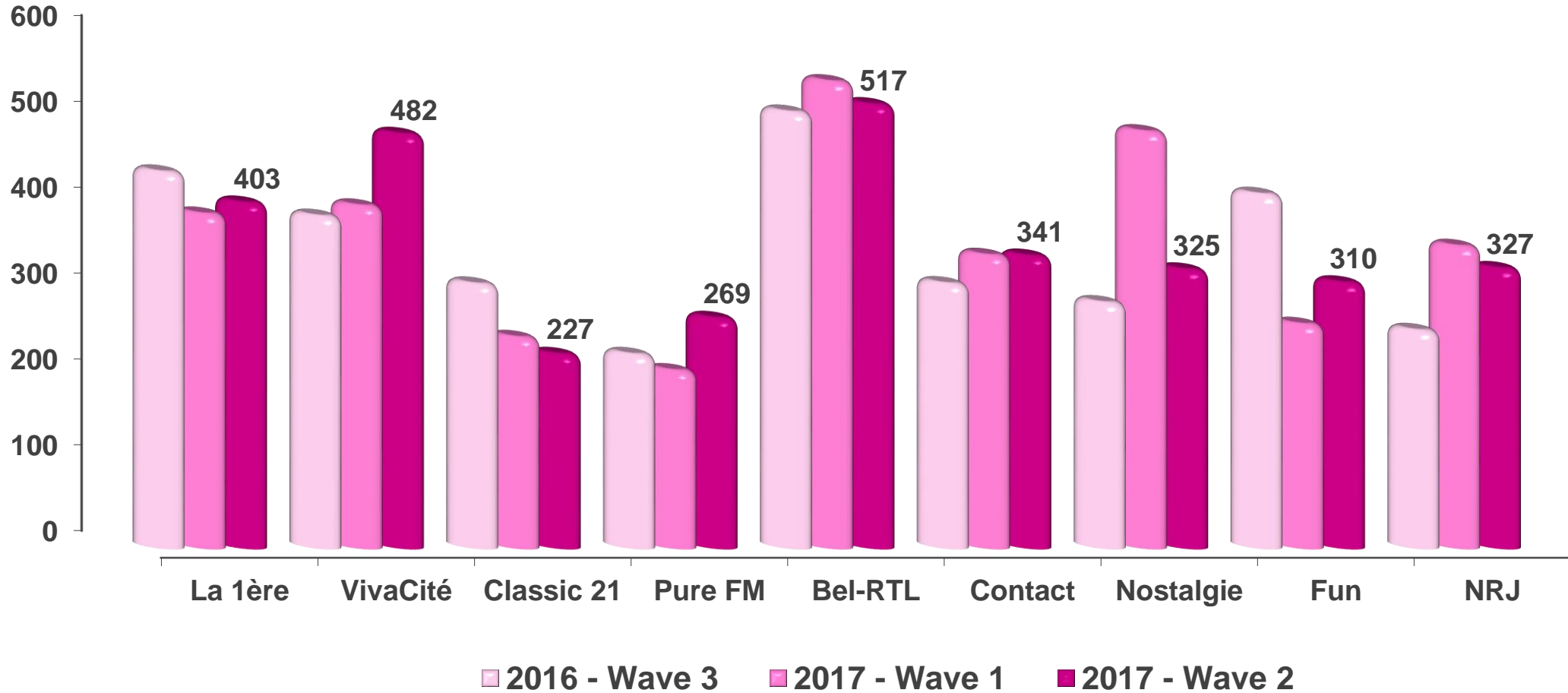
Key Radio Figures South - Audience Shares on ALL 18-44

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 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)

Jun-16/May-17 (Source: CIM Press Brand Report / CIM Circulation)

NORTH	Circulation	vs P-1	% Digital
Het Laatste Nieuws	269.901	↓ 96	4,8%
Het Nieuwsblad	235.525	↓ 96	4,8%
De Standaard	101.139	→ 100	18,1%
Het Belang van Limburg	93.066	↓ 98	6,3%
Gazet van Antwerpen	86.587	↓ 96	5,8%
De Morgen	54.582	↓ 97	29,9%
De Tijd	42.351	↑ 101	38,0%
Total North	883.151	↓ 97	9,7%

SOUTH	Circulation	vs P-1	% Digital
Sud Presse	85.907	↓ 93	8,6%
L'Avenir	81.351	↓ 96	6,0%
Le Soir	68.724	↑ 103	20,2%
DH/Les Sports	41.037	↓ 95	5,9%
La Libre Belgique	36.401	→ 100	12,4%
L'Echo	16.427	→ 100	39,8%
Grenz Echo	10.285	↓ 99	3,1%
Total South	340.132	↓ 97	11,7%

Key Print Figures - Magazines Circulation (Paid + Free)

Jun-16/May-17 (Source: CIM Press Brand Report / CIM Circulation)

Categories	NL-speaking		FR-speaking		Both languages	
	Circulation	vs P-1	Circulation	vs P-1	Circulation	vs P-1
Television	720.079	↓ 92	439.377	↓ 93		
Women	403.056	↓ 91	201.930	→ 100		
Business & News	120.862	↓ 98	146.388	↓ 95	50.358	↑ 108
Generation (Youth/Senior)			17.314	↓ 99	111.912	↑ 109
Men	29.355	↑ 102	18.312	↑ 101	45.665	↑ 105
Lifestyle & Travel					83.678	↑ 103
Build & Deco	15.086	↓ 92	14.939	↓ 88	16.943	↓ 85
TOTAL	1.288.438	↓ 93	838.260	↓ 95	308.556	↑ 105

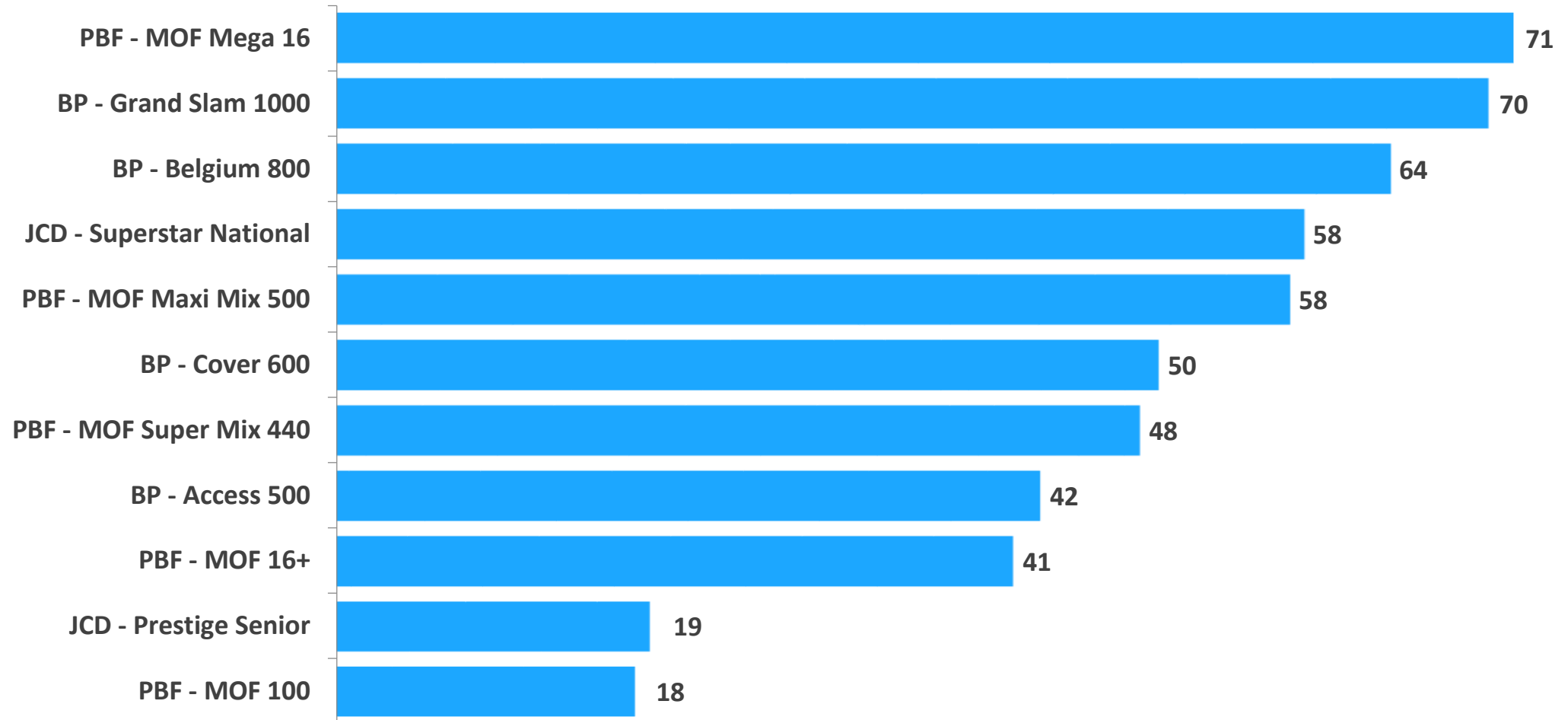


OOH ratings

Key OOH Figures - Panoramic & Classic billboards

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

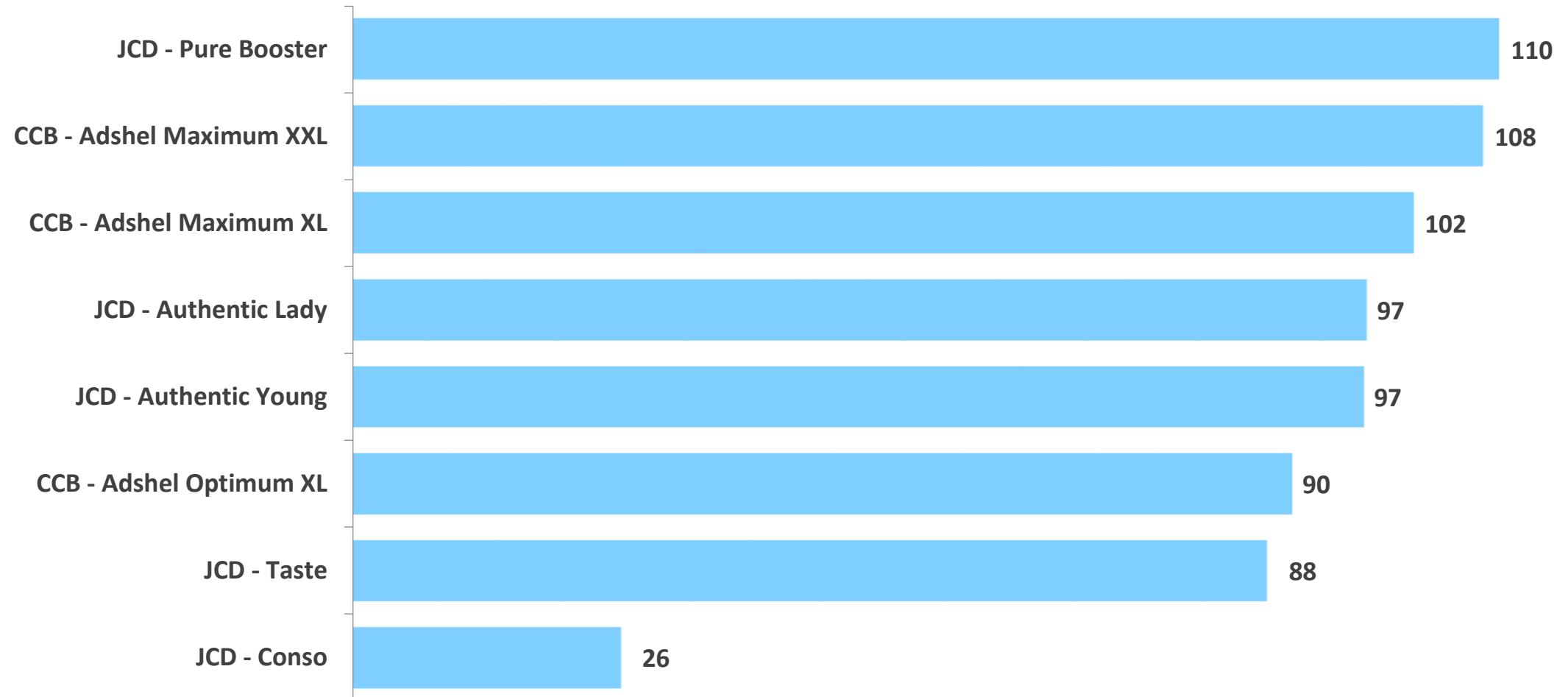
Source: CIM OOH 2017-01 / * : Visibility adjusted Rating Point



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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