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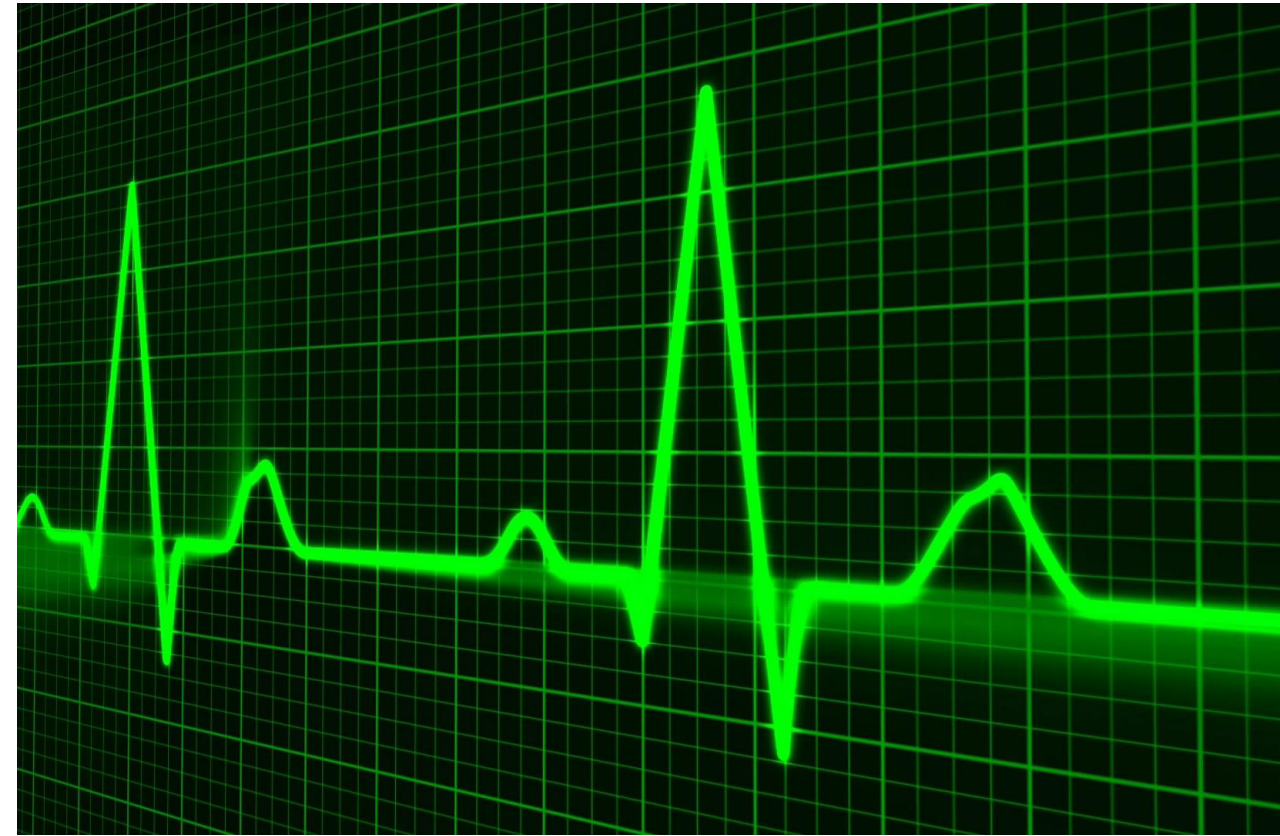
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

August 2019



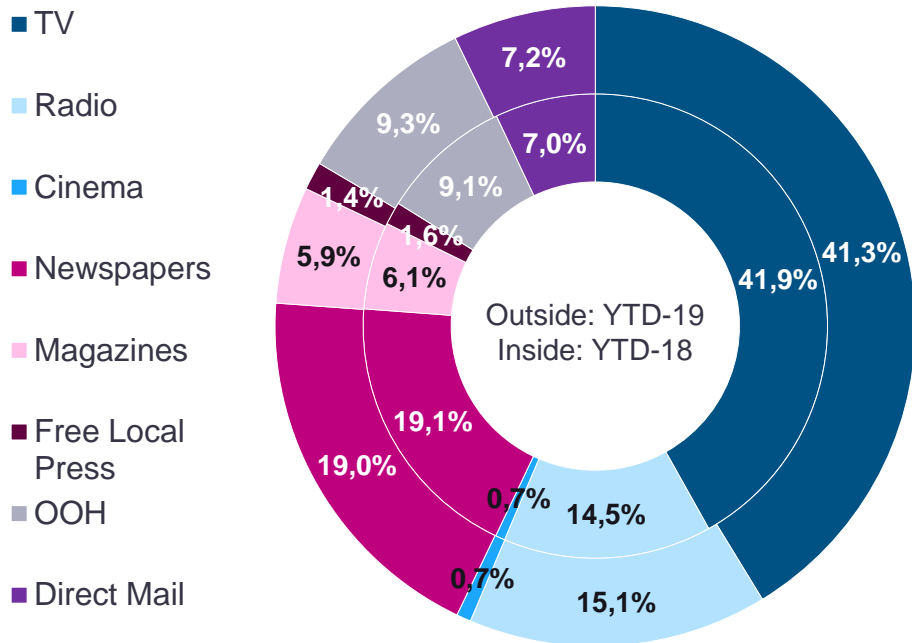
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Jul 2019

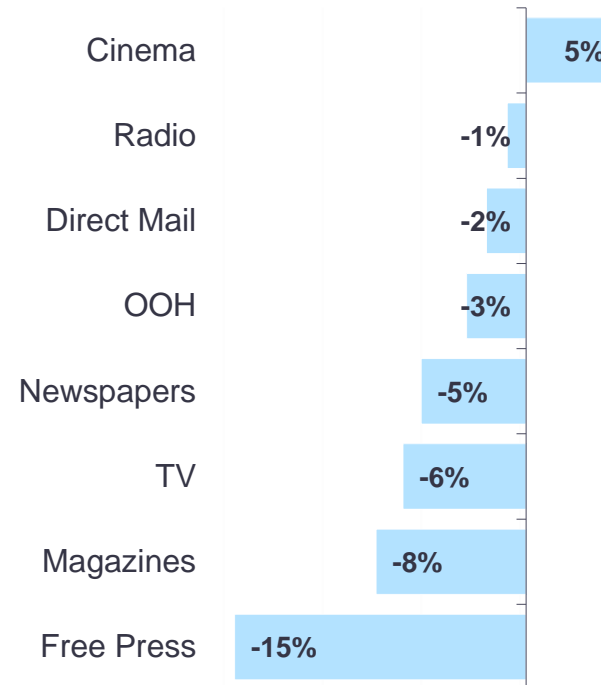
NB : 1) No Internet figures in MDB for 2018 & 2019. 2) Direct Mail : New in 2019.

Market	National	North	South
<ul style="list-style-type: none"> € Mo vs YTD-18 % Region 	2.099,7 - 4,8% 100%	1.276,2 - 3,0% 61%	823,5 - 7,6% 39%

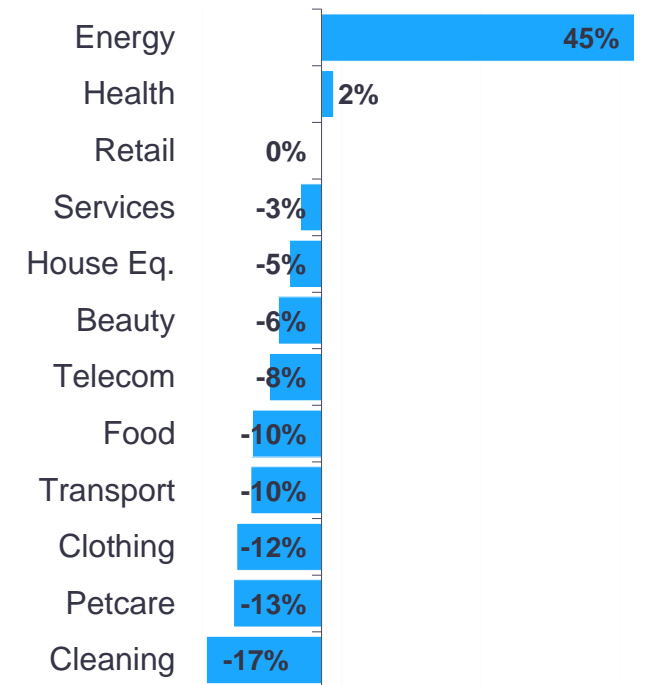
Media Mix Evol.



Media Evol. (vs YTD-18)



EcoGroups Evol. (vs YTD-18)



MDB TOP 30 ADVERTISERS - Jan-Jul 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	58,9	↓ 87
2	COLRUYT GROUP	54,9	↓ 97
3	D'IETEREN GROUP	39,6	↓ 87
4	THE COCA-COLA COMPANY	39,6	↓ 82
5	PSA GROUPE	36,6	↑ 110
6	UNILEVER	31,6	↓ 92
7	RECKITT & BENCKISER	29,8	↓ 87
8	PROXIMUS GROUP	26,6	↓ 83
9	AHOLD DELHAIZE	26,3	↑ 136
10	RENAULT-NISSAN ALLIANCE	20,8	↓ 91
11	TELENET GROUP HOLDING	20,1	↓ 91
12	FERRERO	19,4	↑ 163
13	VINTED	18,9	-
14	CARREFOUR GROUP	18,0	↑ 120
15	ORANGE	17,7	↓ 89

Rank	ADV.GROUP	Gross Inv.	vs YTD-18
16	L'OREAL GROUP	16,2	→ 100
17	THE WALT DISNEY COMPANY	14,4	↑ 114
18	FIAT CHRYSLER AUTOMOBILES	14,1	↓ 88
19	MONDELEZ INTERNATIONAL	13,8	↓ 76
20	LOTERIE NATIONALE	13,0	↓ 86
21	METRO GROUPE	13,0	↑ 116
22	BEIERSDORF	12,4	↓ 82
23	ALDI	12,3	↑ 104
24	GROUPE 3 SUISES	11,3	↓ 91
25	NETHYS	11,1	↓ 93
26	AS WATSON	11,1	↑ 105
27	LIDL & CO	11,0	↑ 120
28	BELFIUS	10,3	↓ 79
29	DANONE GROUP	10,2	↓ 62
30	BMW GROUP	9,9	→ 100



Key TV figures

Key TV figures North - Aug-19

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Aug-19	YTD	Aug-19	YTD	Aug-19	YTD
VTM	PRP 18-54	4,2	6,0	20,7	23,3	711	886
Q2	PRP 18-44	1,5	1,6	8,3	7,1	701	888
VITAYA	PRP 18-54	1,3	1,4	6,4	5,4	567	871
CAZ	MEN 18-54	0,4	0,5	2,7	2,3	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	1,8	3,0	8,9	11,8	706	889
VIJF	PRP 18-54	1,1	1,5	5,4	5,8	646	761
ZES	PRP 18-54	0,6	0,6	2,8	2,2	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	20,1	25,6				
Total TV	PRP 18-44	17,4	22,3				
Total TV	MEN 18-54	16,7	21,1				

Key TV indexes North - Aug-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	
		Aug-19	YTD	Aug-19	YTD	Aug-19	YTD
VTM	PRP 18-54	↓ 94	↓ 96	↓ 96	↘ 99	✗ 107	✗ 106
Q2	PRP 18-44	↓ 85	↓ 82	↓ 89	↓ 87	✗ 103	✗ 114
VITAYA	PRP 18-54	↑ 104	↑ 111	↑ 106	↑ 114	✗ 103	✗ 127
CAZ	MEN 18-54	↓ 79	↓ 96	↓ 83	↑ 102	Package	Package
VIER	PRP 18-54	↓ 98	↑ 119	→ 100	↑ 121	✗ 108	! 101
VIJF	PRP 18-54	↓ 82	↓ 91	↓ 84	↓ 93	✗ 120	✗ 105
ZES	PRP 18-54	↓ 97	↓ 89	↓ 98	↓ 92	Package	Package
Total TV	PRP 18-54	↓ 98	↓ 98				
Total TV	PRP 18-44	↓ 95	↓ 95				
Total TV	MEN 18-54	↓ 95	↓ 95				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

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

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

Variable	Channel	Daypart	YTD-16	YTD-17	YTD-18	YTD-19	19 vs 18
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	27,3%	27,8%	27,5%	27,2%	99
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	85,2%	85,3%	83,0%	81,1%	98
	VHS + DVD player + Blu-Ray	"	4,5%	4,2%	3,6%	2,6%	71
	Video on demand + Digital recorder	"	8,9%	9,2%	11,9%	14,7%	124
	Game console and other devices (3)	"	1,3%	1,4%	1,6%	1,7%	108
% Time shift viewing (4)	All Channels	"	15,4%	23,1%	24,8%	28,8%	116
	Main Channels (5)	"	19,7%	25,6%	29,4%	32,6%	111
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	85	87	86	85	
	Main channels (5) - TSV	"	29	31	34	34	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	114	106	102	94	92
	All TV channels (TSV)	"	18	27	29	31	107
	All TV channels (Live + TSV)	"	132	134	131	125	95
	Other TV Screen Usage	"	30	31	35	37	106
	Total TV Screen Usage	"	161	164	166	162	97

Key TV figures South - Aug-19

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Aug-19	YTD	Aug-19	YTD	Aug-19	YTD
RTL-TVI	PRP 18-54	4,9	6,6	24,3	25,9	669	763
Club-RTL	MEN 18-54	1,0	1,3	6,4	6,9	813	814
Plug-RTL	ALL 15-34	0,3	0,6	2,4	3,9	893	743
La Une	PRP 18-54	2,7	3,5	13,5	13,7	363	603
La Deux	PRP 18-54	1,0	1,3	4,9	5,1	432	563
AB3	PRP 18-44	1,5	2,3	9,1	10,7	337	638
TF1	PRP 18-54	2,5	2,9	12,4	11,4	<i>Package</i>	<i>Package</i>
TTV	PRP 18-54	20,3	25,6				
TTV	PRP 18-44	16,6	21,7				
TTV	ALL 15-34	11,2	14,7				
TTV	MEN 18-54	15,0	19,5				

Key TV indexes South - Aug-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	
		Aug-19	YTD	Aug-19	YTD	Aug-19	YTD
RTL-TVI	PRP 18-54	↓ 89	↓ 96	↓ 96	↗ 101	✘ 112	✘ 104
Club-RTL	MEN 18-54	↓ 67	↓ 94	↓ 75	↑ 102	✘ 132	✘ 105
Plug-RTL	ALL 15-34	↓ 65	↓ 97	↓ 67	↓ 98	✘ 168	✘ 106
La Une	PRP 18-54	↓ 93	↓ 91	↘ 100	↓ 96	✘ 103	✘ 103
La Deux	PRP 18-54	↓ 93	↓ 60	↘ 100	↓ 64	✘ 121	✘ 102
AB3	PRP 18-44	↓ 94	↑ 106	↑ 104	↑ 113	✓ 98	✘ 110
TF1	PRP 18-54	↓ 84	↓ 86	↓ 91	↓ 90	<i>Package</i>	<i>Package</i>
TTV	PRP 18-54	↓ 93	↓ 95				
TTV	PRP 18-44	↓ 90	↓ 94				
TTV	ALL 15-34	↓ 98	↓ 97				
TTV	MEN 18-54	↓ 89	↓ 92				

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

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

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

Variable	Channel	Daypart	YTD-16	YTD-17	YTD-18	YTD-19	19 vs 18
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	33,1%	31,9%	31,2%	30,5%	98
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	81,2%	78,1%	75,3%	72,8%	97
	VHS + DVD player + Blu-Ray	"	6,9%	7,3%	6,6%	4,9%	74
	Video on demand + Digital recorder	"	11,1%	13,9%	17,3%	21,1%	122
	Game console and other devices (3)	"	0,9%	0,7%	0,8%	1,2%	155
% Time shift viewing (4)	All Channels	"	12,4%	17,9%	20,2%	21,3%	106
	Main Channels (5)	"	13,3%	19,5%	20,7%	22,0%	106
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	89	83	87	
	Main channels (5) - TSV	"	55	52	52	51	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	158	138	127	122	97
	All TV channels (TSV)	"	19	26	26	27	105
	All TV channels (Live + TSV)	"	176	164	152	149	98
	Other TV Screen Usage	"	50	53	59	64	110
	Total TV Screen Usage	"	226	217	211	214	101



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 - Aug-19

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.357.330	11	RTL.be	275.043
2	Nieuwsblad	1.100.678	12	Immoweb	246.335
3	SudInfo	478.312	13	Le Soir	241.571
4	2dehands.be-2ememain.be	373.423	14	Het Belang van Limburg	203.472
5	DH.be	345.801	15	De Morgen	172.007
6	De Standaard	318.247	16	Buienradar	153.420
7	VRT	316.420	17	Flair	152.474
8	Sporza	315.706	18	7sur7.be	148.793
9	RTBF.be	298.761	19	L'Avenir.net	144.778
10	Gazet van Antwerpen	278.435	20	Knack-Le Vif	141.076

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

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

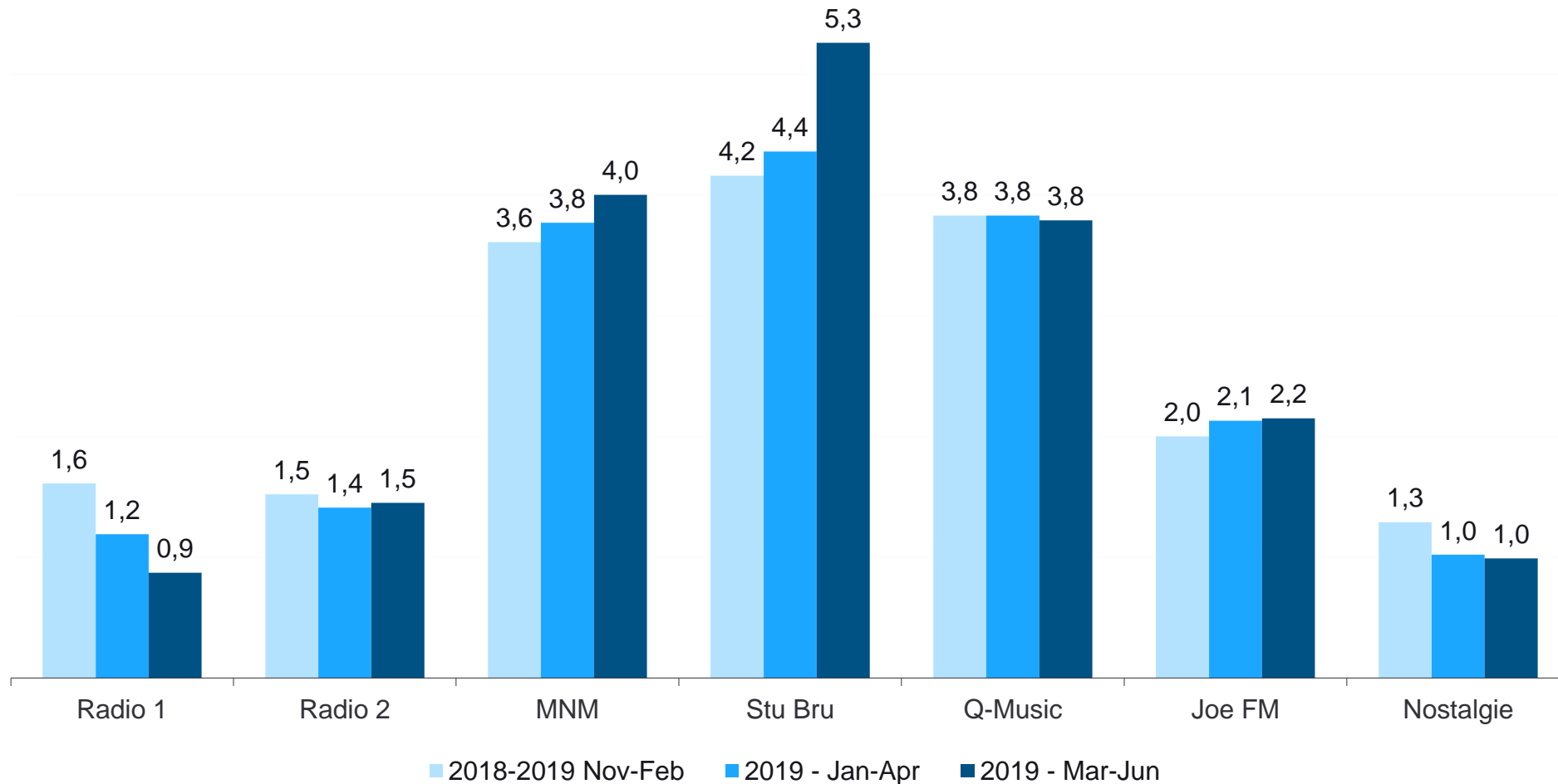
Website	Daily Visitors (000)
MSN.COM	1.022
GOOGLE.BE	1.012
MSN.BE	866
FACEBOOK.COM	657
LINKEDIN.COM	630
LIVE.COM	615
GOOGLE.COM	433
BING.COM	365
YOUTUBE.COM	327
YAHOO.COM	265



Key Radio figures

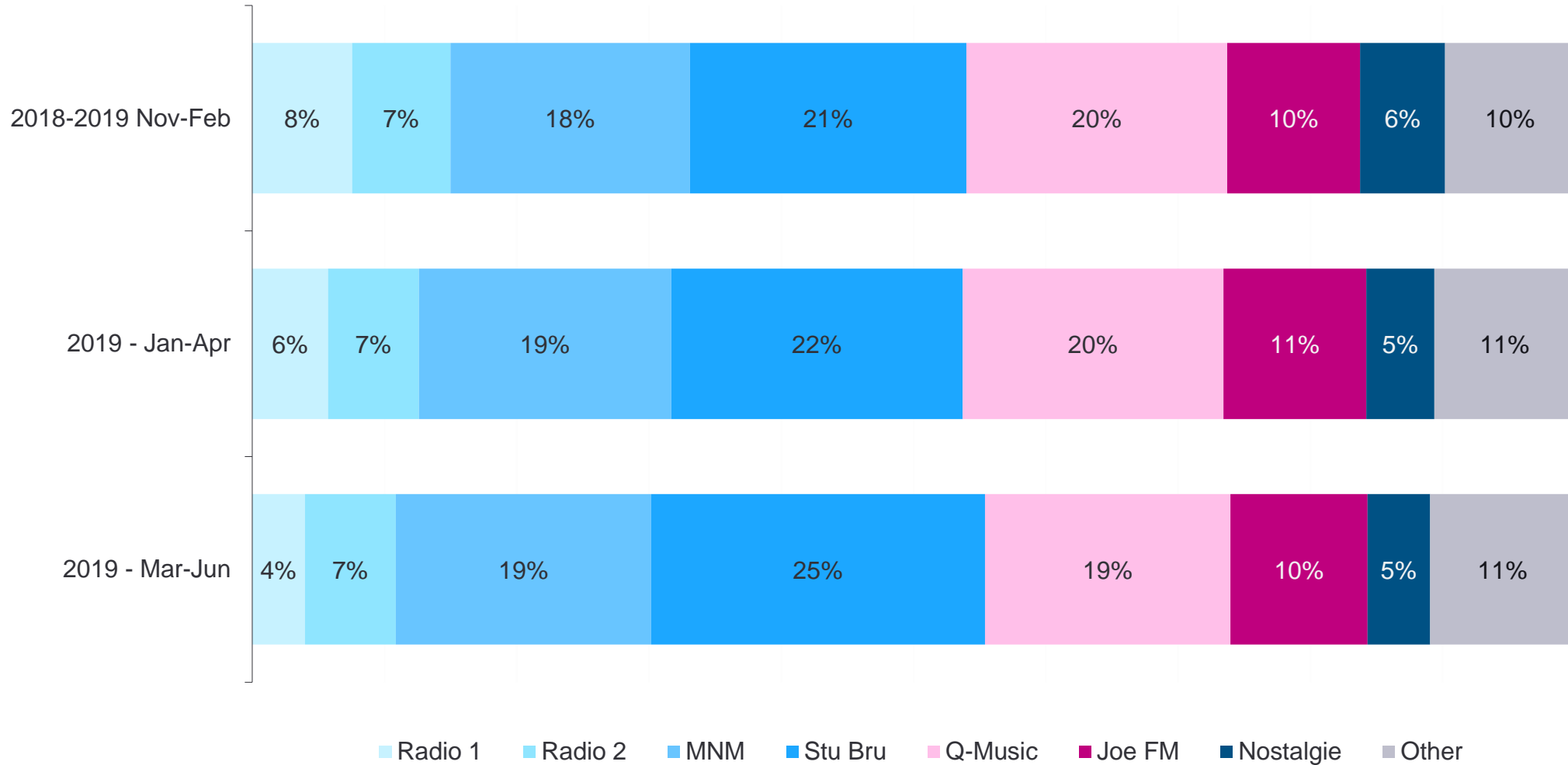
KEY RADIO FIGURES NORTH

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



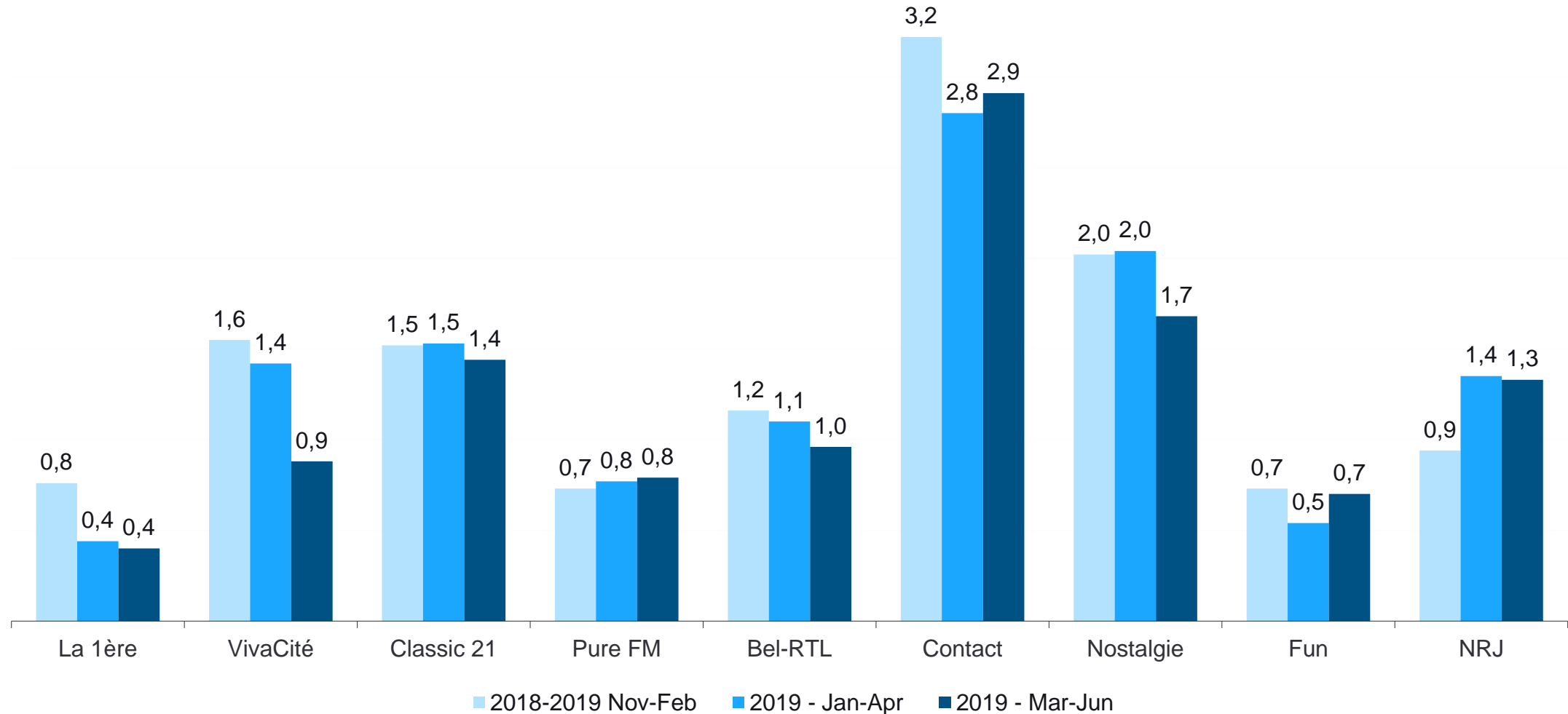
KEY RADIO FIGURES NORTH

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



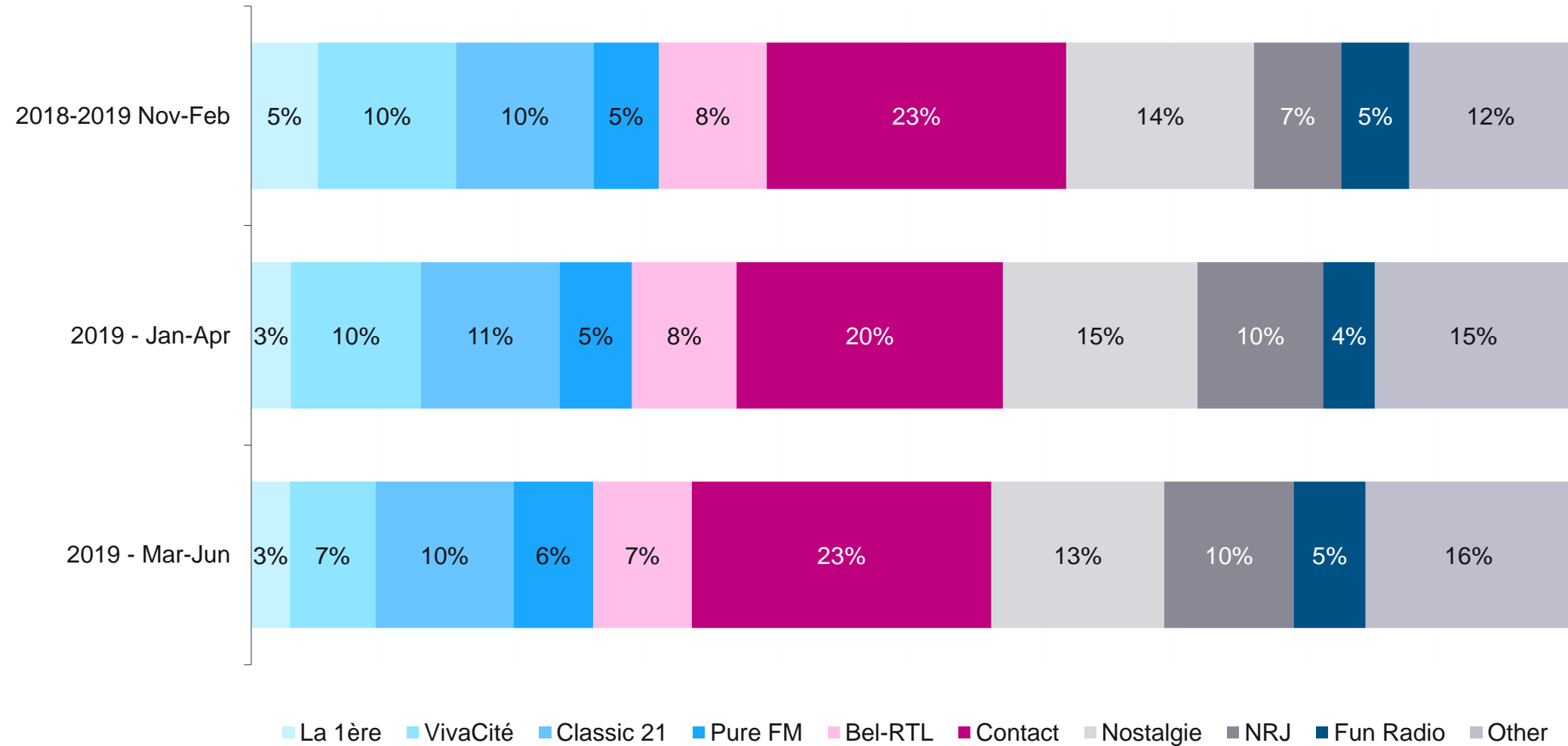
KEY RADIO FIGURES SOUTH

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	258.473	↓ 99	8,6%	↑ 150
Het Nieuwsblad	221.167	↓ 97	7,2%	↑ 140
De Standaard	104.575	↑ 104	25,9%	↑ 129
Het Belang van Limburg	89.532	↓ 98	8,3%	↑ 127
Gazet van Antwerpen	81.593	↓ 96	8,8%	↑ 145
De Morgen	51.887	↓ 98	36,3%	↑ 115
De Tijd	43.940	↑ 104	43,4%	↑ 112
Total North	851.167	↓ 99	13,8%	↑ 130

SOUTH	Circulation (paid+free)	vs 2017	Digital Part	vs 2017
Sud Presse	79.109	↓ 99	13,4%	↑ 223
L'Avenir	77.986	↓ 97	10,7%	↑ 141
Le Soir	63.892	↑ 105	25,3%	↑ 179
La DH	36.659	↓ 97	12,9%	↑ 172
La Libre Belgique	35.502	↑ 102	22,4%	↑ 151
L'Echo	16.382	↑ 101	46,6%	↑ 111
Grenz Echo	9.871	↓ 99	6,1%	↑ 190
Total South	319.401	→ 100	17,5%	↑ 162

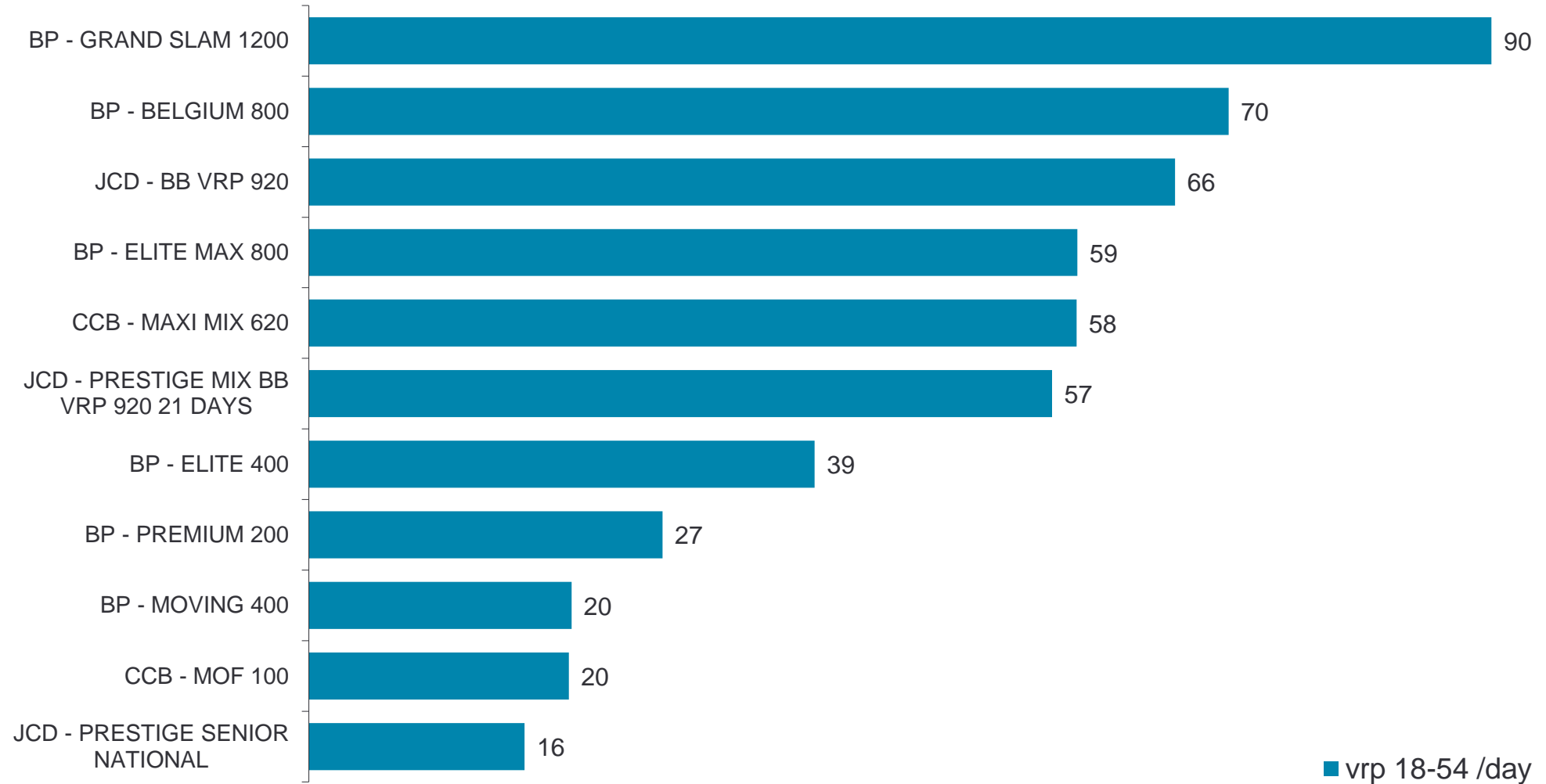
Key Print Figures - Magazines Circulation - Year 2018 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages	
	Circulation	vs 2017	Circulation	vs 2017	Circulation	vs 2017
Television	631.503	↓ 94	400.465	↓ 95		
Women	338.508	↓ 92	167.509	↓ 89		
Business & News	114.065	↓ 96	135.668	↓ 94	58.814	↑ 108
Generation (Youth/Senior)			15.716	↓ 96	122.262	↑ 106
Men	26.104	↓ 92	16.293	↓ 92	43.851	↓ 92
Lifestyle & Travel					76.448	↓ 94
Build & Deco	11.990	↓ 85	13.650	↓ 91	32.712	↓ 73
TOTAL	1.122.170	↓ 93	749.301	↓ 93	334.087	↓ 97



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

