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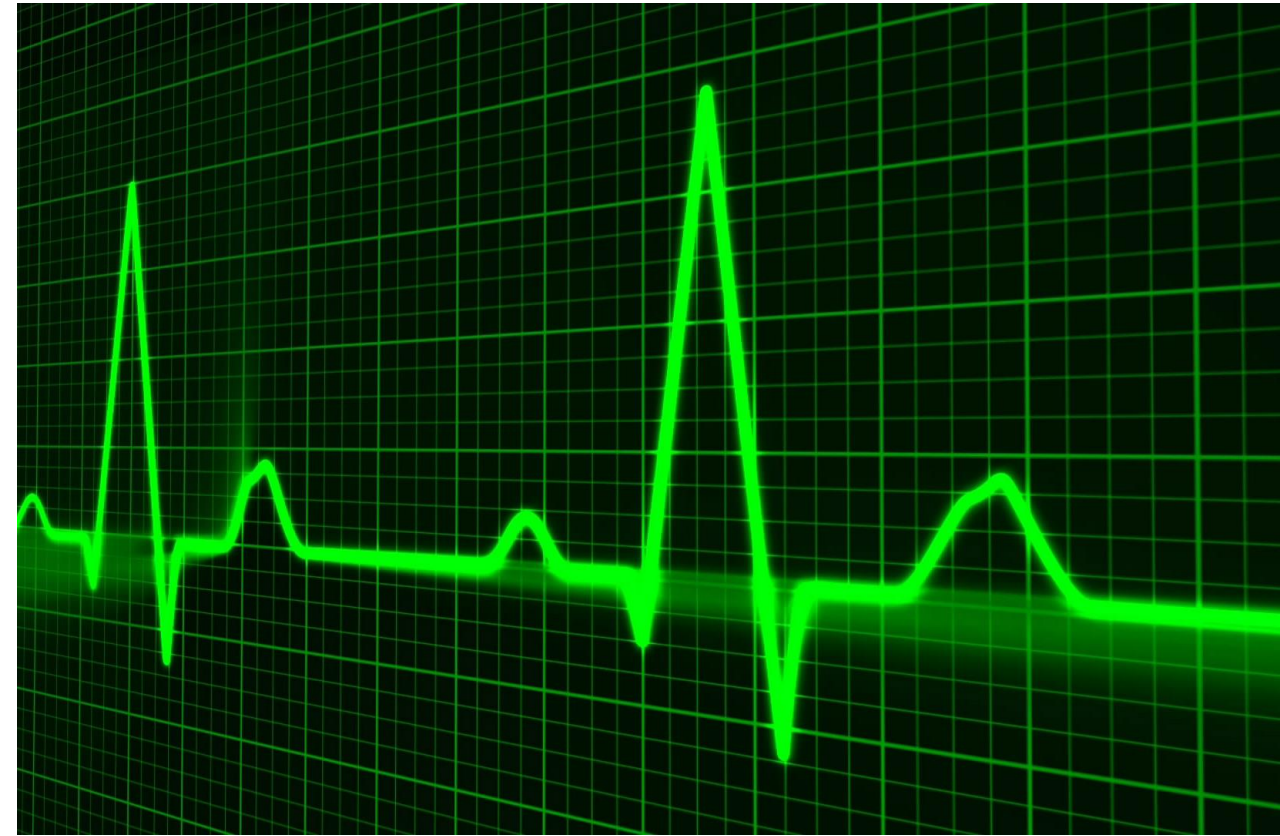
CONNECTIONS AGENCY



intelligence  
Market & Business

# MARKET PERFORMANCES BAROMETER

December 2018



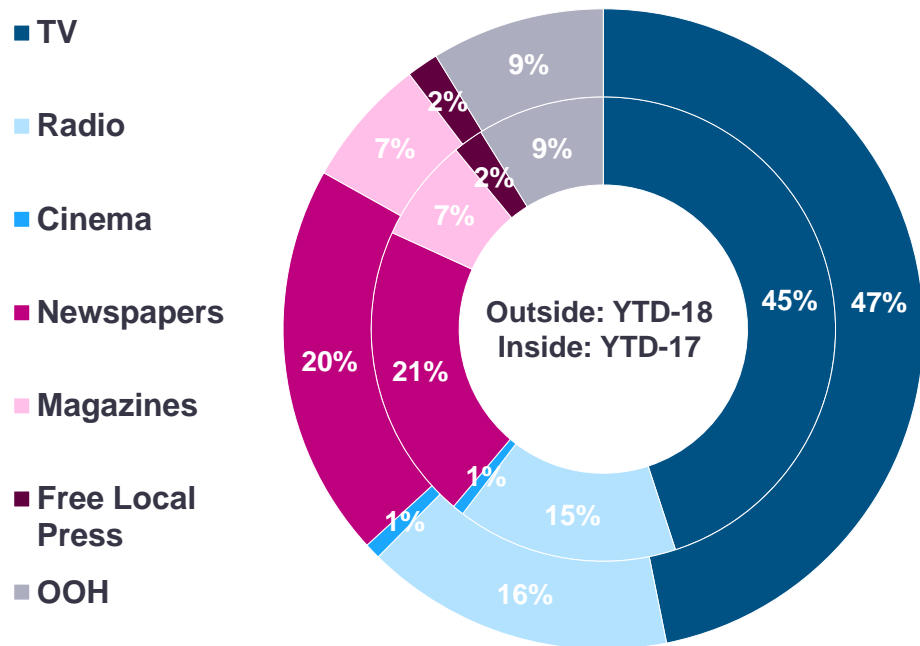
# Gross Media Investments Evolution

# GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Nov 2018

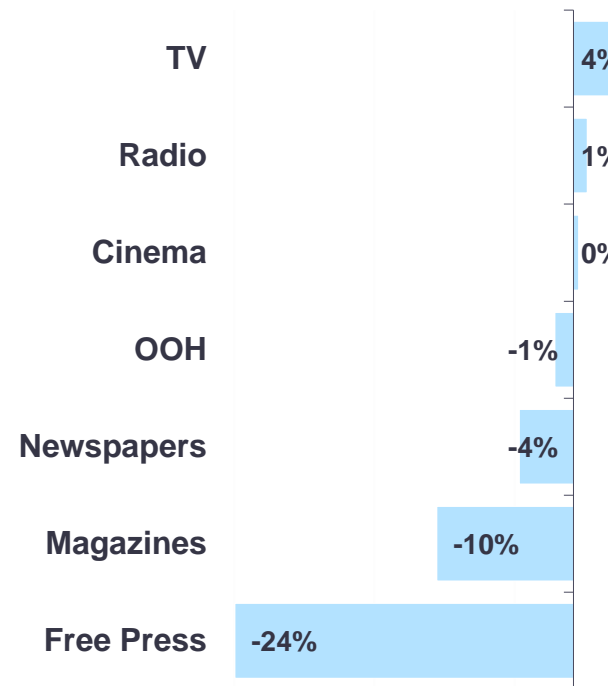
NB : Internet 2018 (declarative) figures are not published yet => internet is not included here !

Market	National	North	South
<ul style="list-style-type: none"> <li>▪ € Mo</li> <li>▪ vs YTD-17 *</li> <li>▪ % Region</li> </ul>	<ul style="list-style-type: none"> <li>▪ 3.389</li> <li>▪ - 0,2%</li> <li>▪ 100%</li> </ul>	<ul style="list-style-type: none"> <li>▪ 2.033</li> <li>▪ - 0,5%</li> <li>▪ 60%</li> </ul>	<ul style="list-style-type: none"> <li>▪ 1.356</li> <li>▪ + 0,3%</li> <li>▪ 40%</li> </ul>

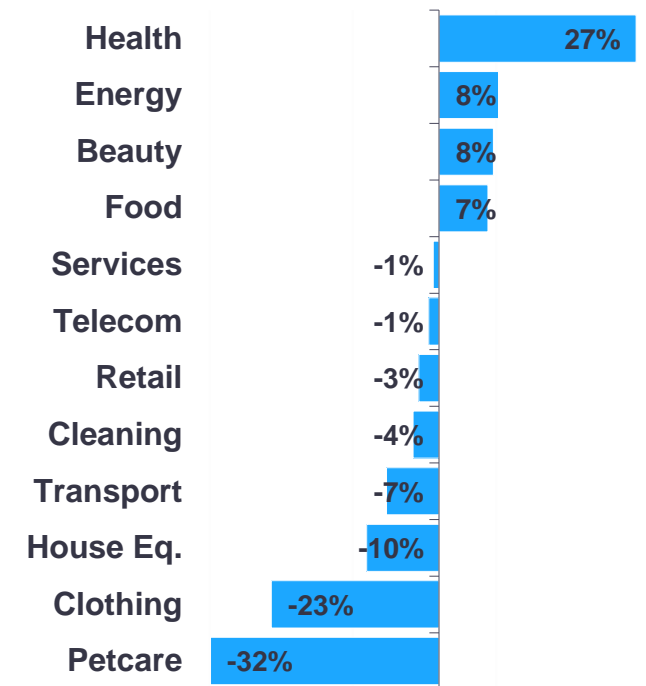
Media Mix Evol.



Media Evol. (vs YTD-17)



EcoGroups Evol. (vs YTD-17)



# MDB TOP 30 ADVERTISERS - Jan-Nov 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	109,4	↑ 103
2	COCA-COLA COMPANY	73,9	↑ 146
3	D'IETEREN GROUP	72,2	↑ 102
4	PROXIMUS GROUP	54,2	↑ 118
5	PSA GROUPE	51,8	↑ 142
6	RECKITT & BENCKISER	51,4	↓ 94
7	UNILEVER	47,2	↓ 88
8	COLRUYT GROUP	36,5	↓ 98
9	TELENET GROUP	34,6	↓ 81
10	RENAULT-NISSAN ALLIANCE	34,5	↑ 102
11	ORANGE	34,2	↓ 97
12	L'OREAL GROUP	30,1	↑ 124
13	FIAT CHRYSLER AUTOMOBILES	27,7	↓ 98
14	ANHEUSER BUSCH INBEV	26,4	↑ 157
15	MONDELEZ INTERNATIONAL	25,3	↓ 97

Rank	ADV.GROUP	Gross Inv.	vs YTD-17
16	DANONE GROUP	25,0	↓ 90
17	ALDI	24,7	↑ 281
18	FERRERO	23,3	↑ 137
19	LOTERIE NATIONALE	22,7	↔ 99
20	THE WALT DISNEY COMPANY	22,6	↑ 131
21	BEIERSDORF	22,5	↓ 93
22	CARREFOUR GROUP	21,5	↓ 86
23	AHOLD DELHAIZE	21,1	↓ 94
24	BNP-PARIBAS	20,5	↔ 99
25	DAIMLER BENZ GROUP	20,0	↓ 91
26	NETHYS	18,9	↓ 89
27	ING GROUP	17,5	↑ 113
28	GLAXOSMITHKLINE	17,4	↓ 83
29	BELFIUS	17,1	↔ 99
30	METRO GROUP	16,9	↓ 92





# Key TV figures

# Key TV figures North - Dec-18

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Dec-18	2018	Dec-18	2018	Dec-18	2018
VTM	PRP 18-54	6,5	6,5	22,2	24,2	1.034	979
Q2	PRP 18-44	2,1	2,0	8,3	8,1	908	888
VITAYA	PRP 18-54	1,5	1,3	5,2	4,8	814	825
CAZ	MEN 18-54	0,6	0,5	2,0	1,9	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	3,8	3,1	13,2	11,5	949	1.007
VIJF	PRP 18-54	1,4	1,6	5,0	5,8	817	793
ZES	PRP 18-54	0,7	0,6	2,3	2,3	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	29,1	27,0				
Total TV	PRP 18-44	25,4	24,1				
Total TV	MEN 18-54	24,0	22,5				

# Key TV indexes North - Dec-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	
		Dec-18	2018	Dec-18	2018	Dec-18	2018
VTM	PRP 18-54	↓ 91	↓ 94	↓ 92	↓ 96	✗ 115	✗ 109
Q2	PRP 18-44	↑ 109	↓ 96	↑ 110	↓ 97	✗ 110	✗ 107
VITAYA	PRP 18-54	↑ 109	↑ 105	↑ 111	↑ 106	✗ 111	✗ 113
CAZ	MEN 18-54	↑ 102	↑ 102	↑ 103	↑ 103	Package	Package
VIER	PRP 18-54	↓ 97	↓ 97	↘ 99	↘ 99	✗ 103	✗ 108
VIJF	PRP 18-54	→ 100	↑ 105	↗ 101	↑ 106	✗ 108	✗ 104
ZES	PRP 18-54	↑ 111	↑ 124	↑ 113	↑ 127	Package	Package
Total TV	PRP 18-54	↘ 99	↓ 98				
Total TV	PRP 18-44	→ 100	↘ 99				
Total TV	MEN 18-54	↓ 95	↓ 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	YTD-15	YTD-16	YTD-17	YTD-18	18 vs 17
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	28,5%	28,2%	28,7%	<b>28,4%</b>	99
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	87,4%	85,8%	85,4%	<b>82,8%</b>	97
	VHS + DVD player + Blue Ray	"	3,9%	4,3%	4,0%	<b>3,5%</b>	87
	Video on demand + Digital recorder	"	5,1%	8,6%	9,4%	<b>12,1%</b>	129
	Game console and other devices (3)	"	0,8%	1,3%	1,3%	<b>1,6%</b>	124
<b>% Time shift viewing (4)</b>	All Channels	"	12,9%	18,3%	23,7%	<b>26,1%</b>	110
	Main Channels (5)	"	15,7%	22,1%	26,6%	<b>30,3%</b>	114
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	87	85	86	<b>86</b>	
	Main channels (5) - TSV	"	27	28	31	<b>34</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	125	113	108	<b>103</b>	95
	All TV channels (TSV)	"	15	22	29	<b>30</b>	105
	All TV channels (Live + TSV)	"	141	135	137	<b>133</b>	97
	Other TV Screen Usage	"	27	29	31	<b>36</b>	116
	Total TV Screen Usage	"	168	165	169	<b>170</b>	100



# Key TV figures South - Dec-18

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Dec-18	2018	Dec-18	2018	Dec-18	2018
RTL-TVI	PRP 18-54	8,1	7,1	27,4	26,1	749	830
Club-RTL	MEN 18-54	1,3	1,5	5,5	6,9	1.361	904
Plug-RTL	ALL 15-34	0,5	0,6	3,2	3,9	917	921
La Une	PRP 18-54	3,8	3,8	13,0	13,9	635	714
La Deux	PRP 18-54	1,7	1,9	5,8	7,0	529	659
AB3	PRP 18-44	2,7	2,4	10,5	10,4	818	642
TF1	PRP 18-54	4,1	3,5	14,0	12,8	<i>Package</i>	<i>Package</i>
TTV	PRP 18-54	29,5	27,2				
TTV	PRP 18-44	25,3	23,3				
TTV	ALL 15-34	17,1	15,2				
TTV	MEN 18-54	22,8	21,3				

# Key TV indexes South - Dec-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	
		Dec-18	2018	Dec-18	2018	Dec-18	2018
RTL-TVI	PRP 18-54	↓ 94	↓ 91	↔ 101	↓ 98	✓ 94	✗ 109
Club-RTL	MEN 18-54	↓ 79	↓ 98	↓ 86	↑ 103	✗ 150	✗ 112
Plug-RTL	ALL 15-34	↓ 51	↓ 58	↓ 56	↓ 65	✗ 115	✗ 122
La Une	PRP 18-54	↑ 112	↔ 100	↑ 120	↑ 107	✓ 94	✗ 106
La Deux	PRP 18-54	↓ 86	↑ 121	↓ 92	↑ 129	✓ 84	✗ 109
AB3	PRP 18-44	↑ 119	↑ 105	↑ 129	↑ 114	✗ 127	✗ 104
TF1	PRP 18-54	↓ 85	↓ 80	↓ 91	↓ 86	Package	Package
TTV	PRP 18-54	↓ 94	↓ 93				
TTV	PRP 18-44	↓ 92	↓ 92				
TTV	ALL 15-34	↓ 92	↓ 89				
TTV	MEN 18-54	↓ 92	↓ 96				

# 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	YTD-15	YTD-16	YTD-17	YTD-18	18 vs 17
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	32,8%	33,6%	32,8%	<b>31,6%</b>	96
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	80,9%	80,6%	78,0%	<b>75,1%</b>	96
	VHS + DVD player + Blue Ray	"	7,8%	7,0%	6,9%	<b>6,2%</b>	91
	Video on demand + Digital recorder	"	6,4%	11,5%	14,3%	<b>17,9%</b>	125
	Game console and other devices (3)	"	1,1%	0,8%	0,8%	<b>0,8%</b>	96
<b>% Time shift viewing (4)</b>	All Channels	"	9,1%	13,4%	18,8%	<b>20,4%</b>	109
	Main Channels (5)	"	10,3%	14,5%	20,3%	<b>20,9%</b>	103
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	89	89	88	<b>84</b>	
	Main channels (5) - TSV	"	45	52	51	<b>52</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	160	157	140	<b>128</b>	91
	All TV channels (TSV)	"	13	21	27	<b>26</b>	97
	All TV channels (Live + TSV)	"	174	178	167	<b>154</b>	92
	Other TV Screen Usage	"	49	51	55	<b>60</b>	109
	Total TV Screen Usage	"	223	229	222	<b>214</b>	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 - Dec-18

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.158.162	11	Le Soir	248.228
2	Nieuwsblad	1.018.360	12	RTL.be	246.606
3	2dehands.be-2ememain.be	531.045	13	Het Belang van Limburg	198.937
4	Sudinfo	348.846	14	Knack-Le Vif	184.562
5	De Standaard	338.623	15	De Morgen	182.571
6	VRT	330.873	16	Immoweb	166.139
7	Gazet van Antwerpen	298.305	17	La Libre.be	144.195
8	RTBF.be	293.747	18	7sur7.be	136.478
9	DH.be	279.523	19	Een	135.578
10	Sporza	277.662	20	Libelle/Femmes dAujourd'hui	134.862

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

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

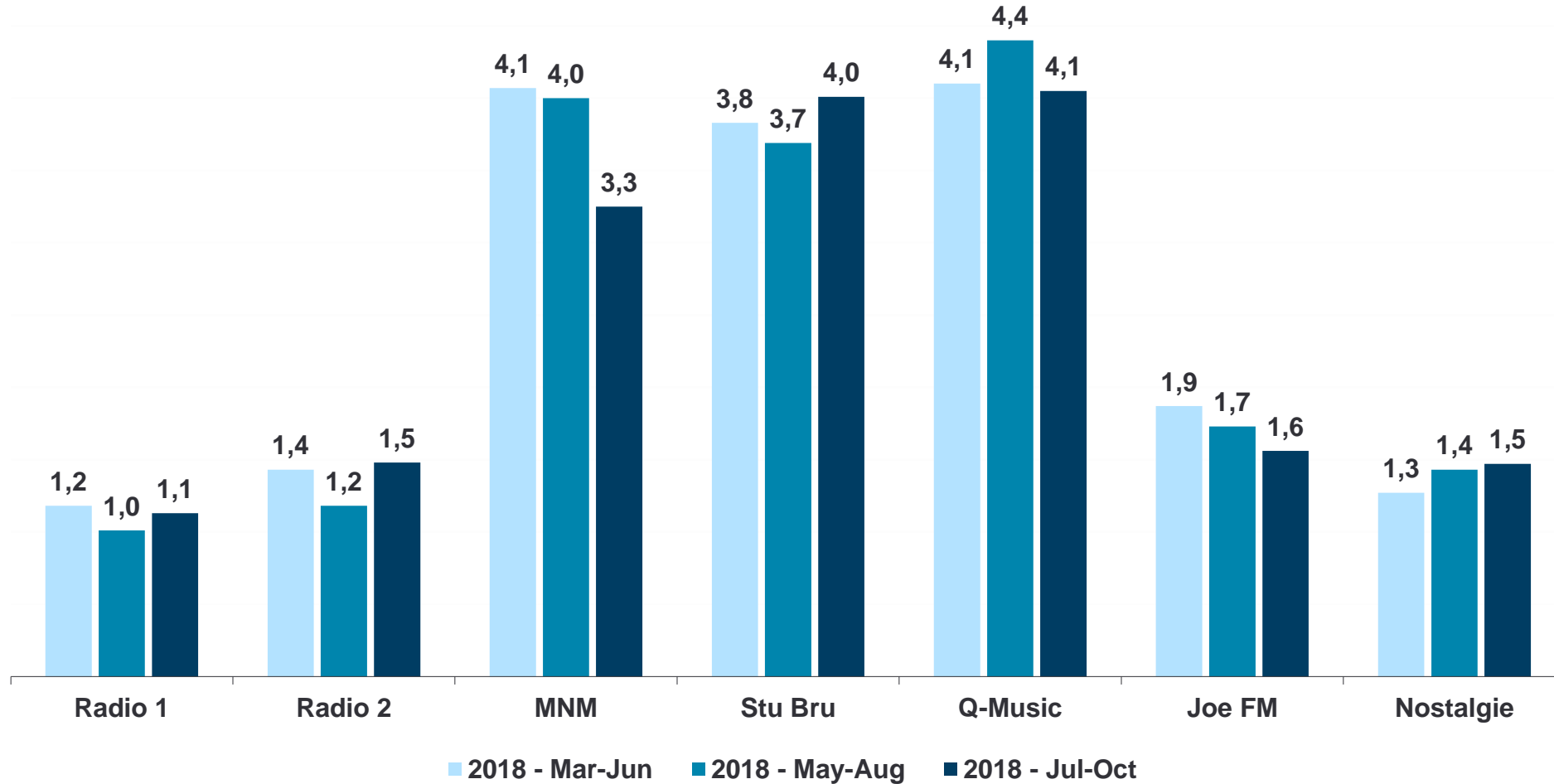
Website	Daily Visitors (000)
MSN.COM	1.022
GOOGLE.BE	1.012
MSN.BE	866
FACEBOOK.COM	657
LINKEDIN.COM	630
LIVE.COM	615
GOOGLE.COM	433
BING.COM	365
YOUTUBE.COM	327
YAHOO.COM	265



# Key Radio figures

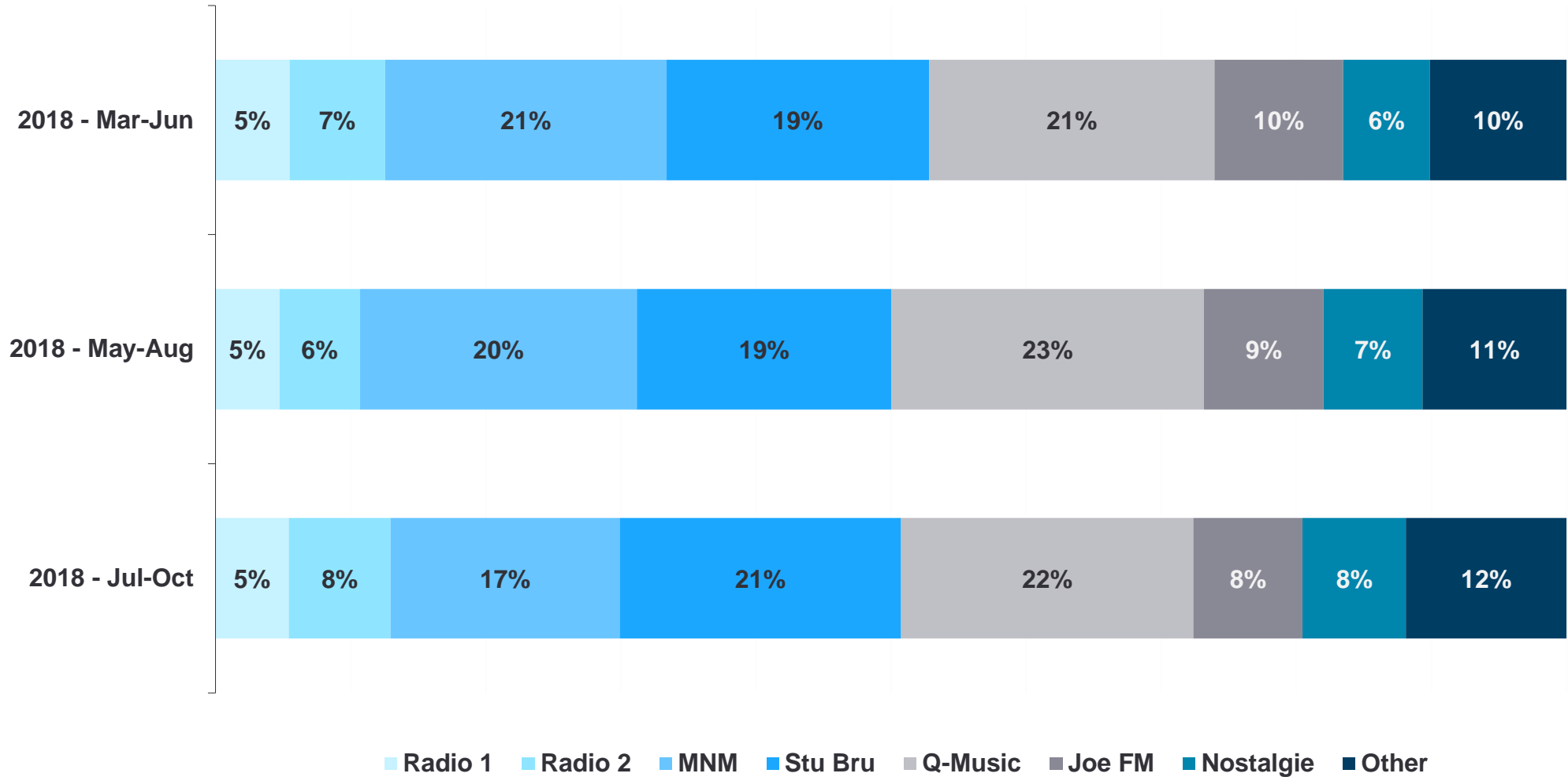
# KEY RADIO FIGURES NORTH

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



# KEY RADIO FIGURES NORTH

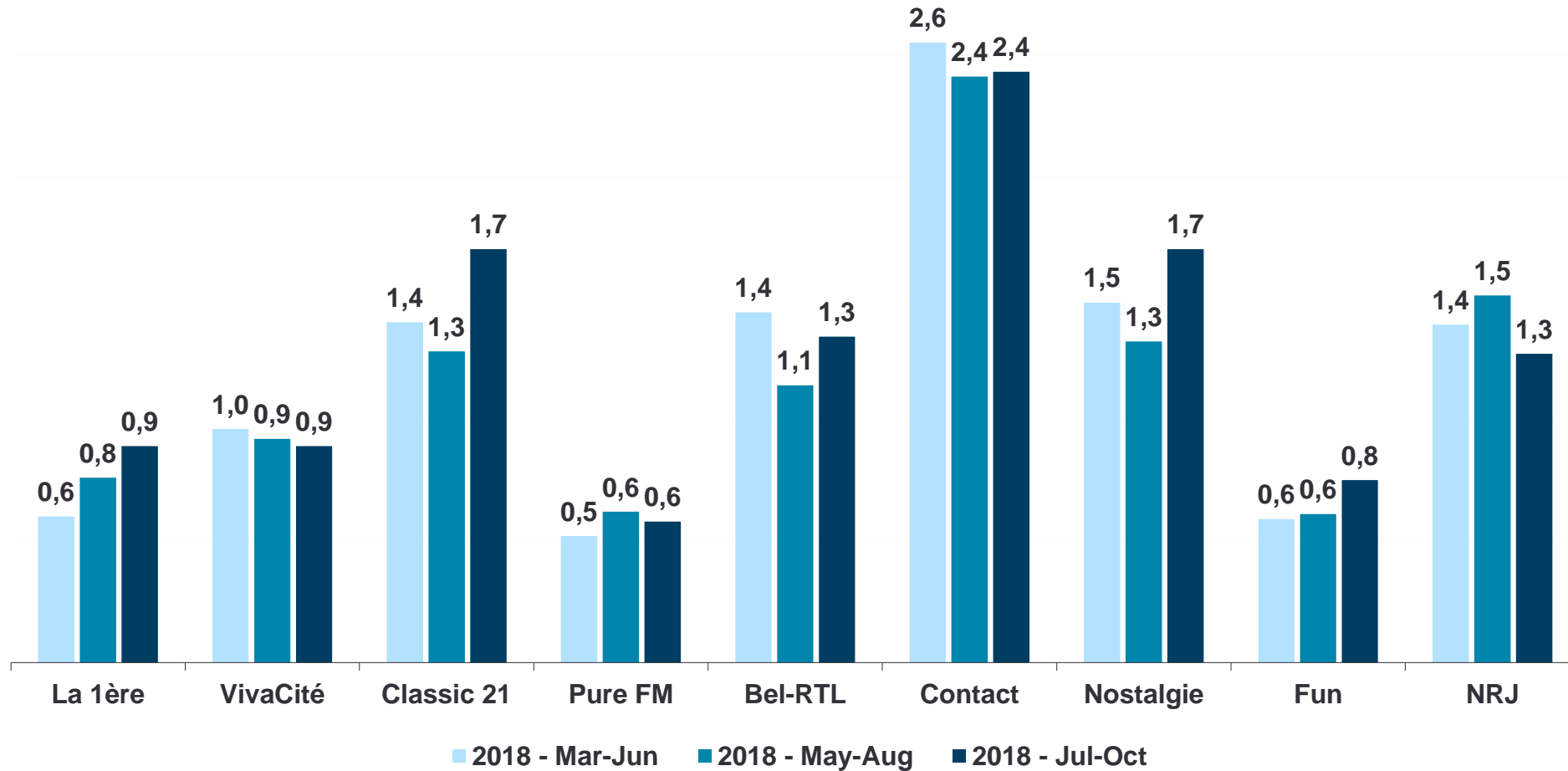
## Audience Shares (%) on ALL 18-44 - 07:00-19:00





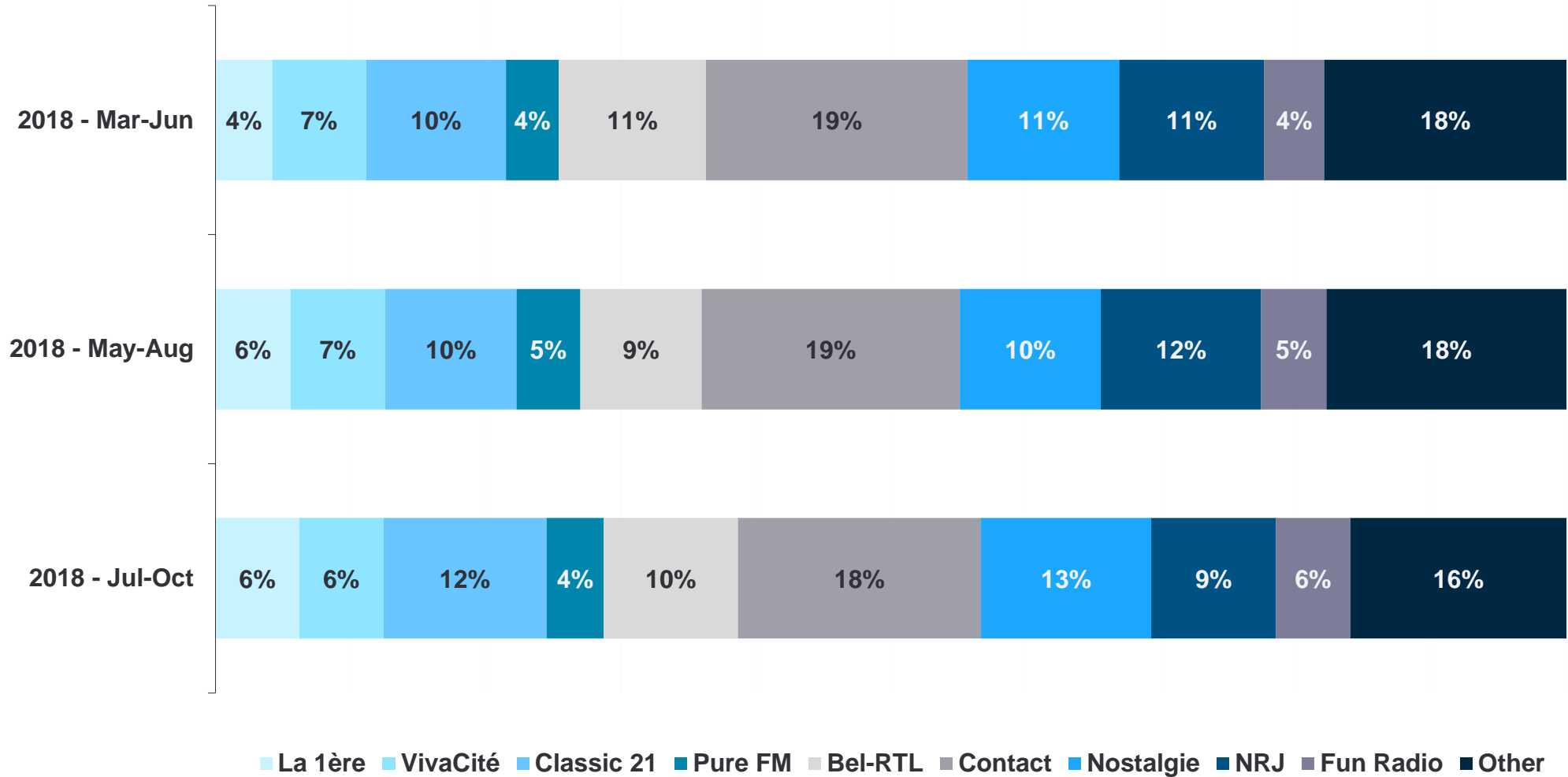
# KEY RADIO FIGURES SOUTH

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%
<b>Total North</b>	<b>860.130</b>	<b>↓ 96</b>	<b>10,6%</b>

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%
<b>Total South</b>	<b>320.881</b>	<b>↓ 92</b>	<b>11,2%</b>



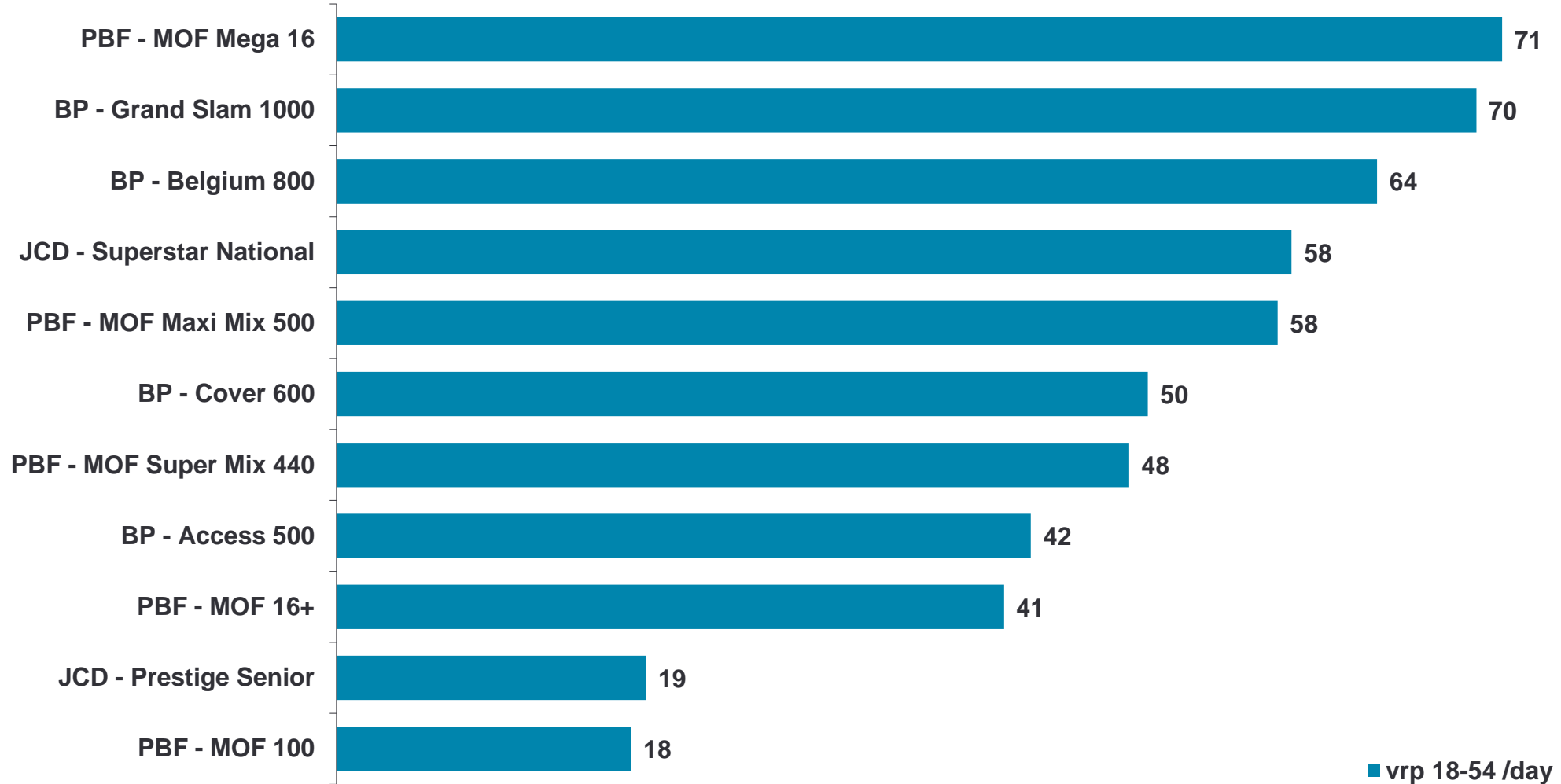
# Key Print Figures - Magazines Circulation - Year 2017 (Paid + Free - digital sales included)

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
<b>TOTAL</b>	<b>1.188.061</b>	<b>↓ 92</b>	<b>804.795</b>	<b>↓ 94</b>	<b>316.508</b>	<b>↑ 103</b>



# 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

