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CONNECTIONS AGENCY

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Gross Media Investments Evolution

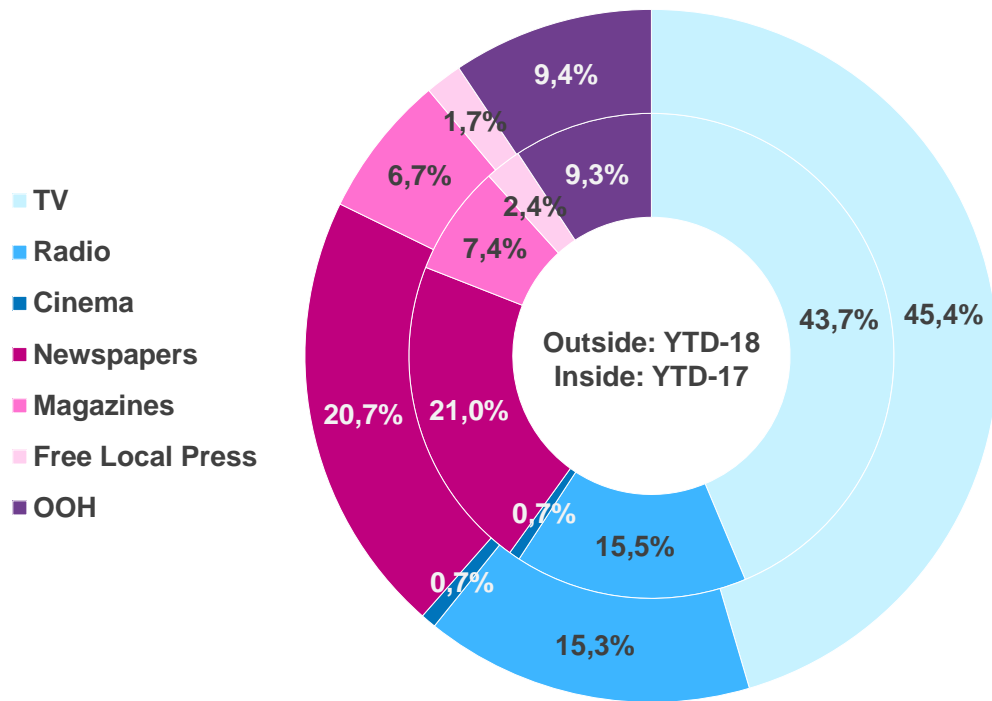
GROSS MEDIA INVESTMENTS EVOLUTION

Jan-Jul 2018

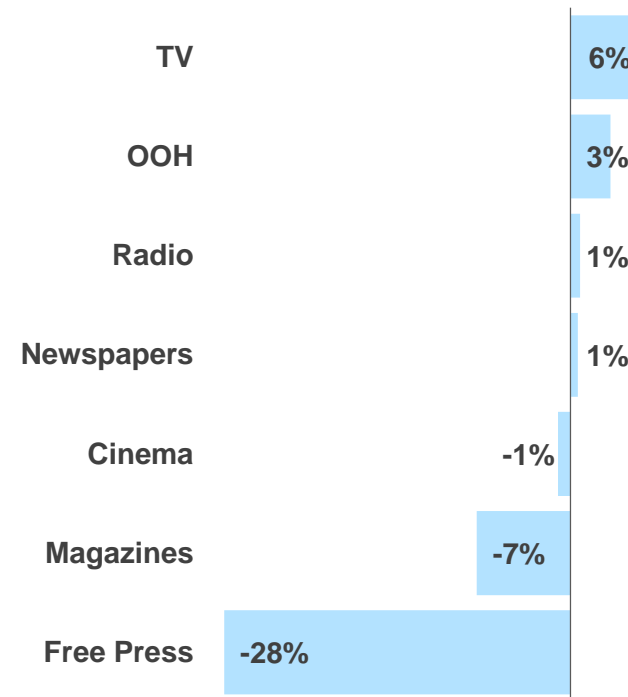
Source: MDB / Nielsen

Market	National	North	South
<ul style="list-style-type: none"> • € Mo • vs YTD-17 * • % Region 	<ul style="list-style-type: none"> • 2.036,0 • + 2,0% • 100% 	<ul style="list-style-type: none"> • 1206,1 • + 0,6% • 59% 	<ul style="list-style-type: none"> • 829,9 • + 4,0% • 41%

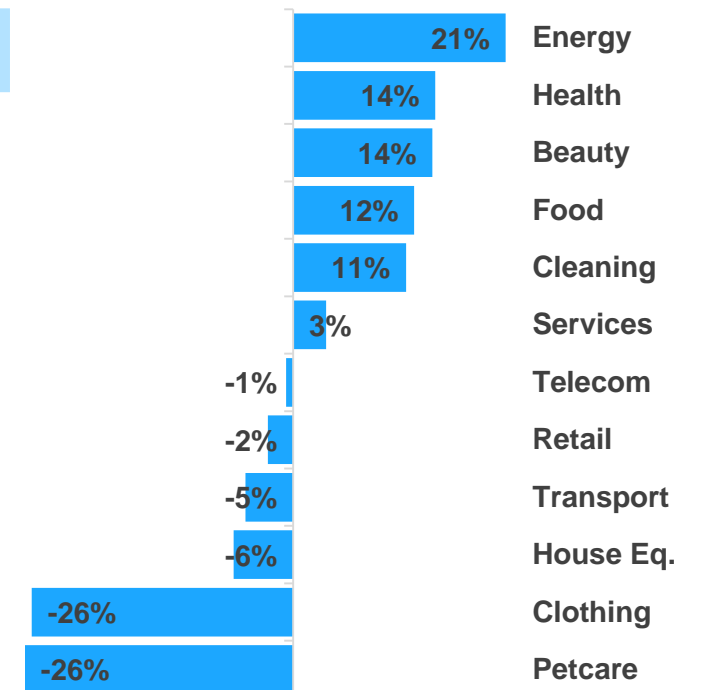
Media Mix Evol.



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-Jul 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	PROCTER & GAMBLE	67,41	↑ 119	16	FIAT CHRYSLER AUTOMOBILES	16,0	↓ 90
2	COCA-COLA COMPANY	46,88	↑ 158	17	BEIERSDORF	15,0	↑ 119
3	D'IETEREN GROUP	44,0	→ 100	18	DAIMLER BENZ GROUP	14,0	→ 99
4	RECKITT & BENCKISER	34,2	↓ 90	19	LOTERIE NATIONALE	13,3	↑ 134
5	UNILEVER	34,1	↑ 113	20	THE WALT DISNEY COMPANY	12,6	↑ 127
6	PSA GROUPE	32,9	↑ 140	21	AHOLD DELHAIZE	12,3	↑ 108
7	PROXIMUS GROUP	30,8	↑ 119	22	FERRERO	11,8	↑ 118
8	RENAULT-NISSAN ALLIANCE	22,3	↓ 96	23	ALDI	11,8	↑ 1260
9	COLRUYT GROUP	21,6	↑ 109	24	NETHYS	11,6	↑ 105
10	TELENET GROUP HOLDING	20,1	↑ 106	25	JAGUAR LAND ROVER BELUX	11,4	↑ 184
11	ANHEUSER BUSCH INBEV	19,4	↑ 222	26	FORD MOTOR COMPANY	11,3	↑ 113
12	ORANGE	19,3	↓ 87	27	BNP-PARIBAS	11,2	↑ 104
13	MONDELEZ INTERNATIONAL	18,0	↓ 92	28	GLAXOSMITHKLINE	11,1	↓ 79
14	DANONE GROUP	16,3	→ 101	29	ING GROUP	10,8	↑ 118
15	L'OREAL GROUP	16,1	↑ 117	30	BELFIUS	10,8	↑ 122

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



Key TV Figures

Key TV figures North - Aug-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	
		Aug-18	YTD	Aug-18	YTD	Aug-18	YTD
VTM	PRP 18-54	4,4	6,2	21,6	23,6	739	881
Q2	PRP 18-44	1,7	1,9	9,3	8,3	702	829
VITAYA	PRP 18-54	1,2	1,2	6,0	4,7	676	797
CAZ	MEN 18-54	0,6	0,5	3,2	2,2	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	1,8	2,5	8,9	9,7	697	975
VIJF	PRP 18-54	1,3	1,6	6,4	6,2	645	733
ZES	PRP 18-54	0,6	0,6	2,9	2,4	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	20,5	26,2				
Total TV	PRP 18-44	18,3	23,4				
Total TV	MEN 18-54	17,5	22,1				

Key TV indexes North - Aug-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Aug-18 vs P-1	YTD	Aug-18 vs P-1	YTD	Aug-18 vs Channel's Objective	YTD
VTM	PRP 18-54	↓ 80	↓ 93	↓ 90	↓ 94	× 111	× 106
Q2	PRP 18-44	↓ 88	↓ 95	↓ 97	↓ 95	× 113	× 107
VITAYA	PRP 18-54	↑ 125	↑ 102	↑ 140	↑ 103	× 123	× 116
CAZ	MEN 18-54	→ 100	↑ 102	↑ 111	↑ 102	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	↓ 88	↓ 93	→ 99	↓ 95	× 108	× 113
VIJF	PRP 18-54	↓ 78	↑ 107	↓ 88	↑ 108	× 122	× 103
ZES	PRP 18-54	↑ 118	↑ 134	↑ 133	↑ 136	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	↓ 89	→ 99				
Total TV	PRP 18-44	↓ 90	→ 100				
Total TV	MEN 18-54	↓ 90	→ 99				

Time Shift Viewing & Other TV Screen Usage Evolution

Market: 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-15	YTD-16	YTD-17	YTD-18	18 vs 17
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	27,5%	27,3%	27,8%	27,5%	99
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	87,3%	85,2%	85,3%	83,0%	97
	VHS + DVD player + Blue Ray	"	3,9%	4,5%	4,2%	3,6%	87
	Video on demand + Digital recorder	"	7,9%	8,9%	9,2%	11,9%	128
	Game console and other devices (3)	"	0,9%	1,3%	1,4%	1,6%	115
% Time shift viewing (4)	All Channels	"	12,0%	15,4%	23,1%	24,8%	107
	Main Channels (5)	"	14,7%	19,7%	25,6%	29,4%	115
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	85	87	86	
	Main channels (5) - TSV	"	27	29	31	34	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	124	114	106	102	96
	All TV channels (TSV)	"	14	18	27	29	105
	All TV channels (Live + TSV)	"	137	132	134	131	98
	Other TV Screen Usage	"	27	30	31	35	115
	Total TV Screen Usage	"	164	161	164	166	101

(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 - Aug-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 (€ - with comm.) Total Day	
		Aug-18	YTD	Aug-18	YTD	Aug-18	YTD
RTL-TVI	PRP 18-54	5,6	6,9	25,4	25,7	677	790
Club-RTL	MEN 18-54	1,5	1,4	8,6	6,7	620	861
Plug-RTL	ALL 15-34	0,4	0,6	3,5	4,0	764	901
La Une	PRP 18-54	3,0	3,8	13,5	14,2	402	690
La Deux	PRP 18-54	1,1	2,2	4,9	8,0	396	638
AB3	PRP 18-44	1,6	2,2	8,7	9,5	496	623
TF1	PRP 18-54	3,0	3,4	13,6	12,7	<i>Package</i>	<i>Package</i>
TTV	PRP 18-54	21,9	26,8				
TTV	PRP 18-44	18,4	23,0				
TTV	ALL 15-34	11,3	15,1				
TTV	MEN 18-54	16,8	21,2				

Key TV indexes South - Aug-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Aug-18 vs P-1	YTD	Aug-18 vs P-1	YTD	Aug-18 vs Channel's Objective	YTD
RTL-TVI	PRP 18-54	↓ 91	↓ 91	↔ 101	↓ 96	✗ 114	✗ 110
Club-RTL	MEN 18-54	↑ 108	↔ 100	↑ 118	↑ 102	✗ 102	✗ 112
Plug-RTL	ALL 15-34	↓ 69	↓ 73	↓ 87	↓ 81	✗ 140	✗ 126
La Une	PRP 18-54	↓ 90	↔ 100	↔ 100	↑ 105	✗ 105	✗ 110
La Deux	PRP 18-54	↓ 68	↑ 142	↓ 75	↑ 150	✗ 127	✗ 114
AB3	PRP 18-44	↑ 109	↔ 99	↑ 122	↑ 104	✗ 148	✗ 111
TF1	PRP 18-54	↓ 79	↓ 79	↓ 88	↓ 83	<i>Package</i>	<i>Package</i>
TTV	PRP 18-54	↓ 90	↓ 95				
TTV	PRP 18-44	↓ 89	↓ 94				
TTV	ALL 15-34	↓ 80	↓ 91				
TTV	MEN 18-54	↓ 92	↓ 98				

Time Shift Viewing & Other TV Screen Usage Evolution

Market: 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-15	YTD-16	YTD-17	YTD-18	18 vs 17
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	31,8%	33,1%	31,9%	31,2%	98
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	81,0%	81,2%	78,1%	75,3%	97
	VHS + DVD player + Blue Ray	"	7,9%	6,9%	7,3%	6,6%	91
	Video on demand + Digital recorder	"	9,9%	11,1%	13,9%	17,3%	124
	Game console and other devices (3)	"	1,2%	0,9%	0,7%	0,8%	104
% Time shift viewing (4)	All Channels	"	8,3%	12,4%	17,9%	20,2%	113
	Main Channels (5)	"	9,1%	13,3%	19,5%	20,7%	106
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	90	88	89	83	
	Main channels (5) - TSV	"	42	55	52	52	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	158	158	138	127	92
	All TV channels (TSV)	"	12	19	26	26	100
	All TV channels (Live + TSV)	"	170	176	164	152	93
	Other TV Screen Usage	"	48	50	53	59	110
	Total TV Screen Usage	"	217	226	217	211	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-TV1 + 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 - Aug-18

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

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.226.584	11	RTL.be	242.272
2	Nieuwsblad	976.872	12	Immoweb	210.639
3	2dehands.be-2ememain.be	567.761	13	Le Soir	204.681
4	De Standaard	316.275	14	Het Belang van Limburg	186.433
5	Sporza	311.365	15	Knack-Le Vif	166.679
6	SudInfo	301.045	16	De Morgen	162.526
7	VRT	293.483	17	Buienradar	162.367
8	RTBF.be	257.721	18	7sur7.be	124.643
9	Gazet van Antwerpen	257.592	19	La Libre.be	119.973
10	DH.be	244.360	20	L'Avenir.net	119.086

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



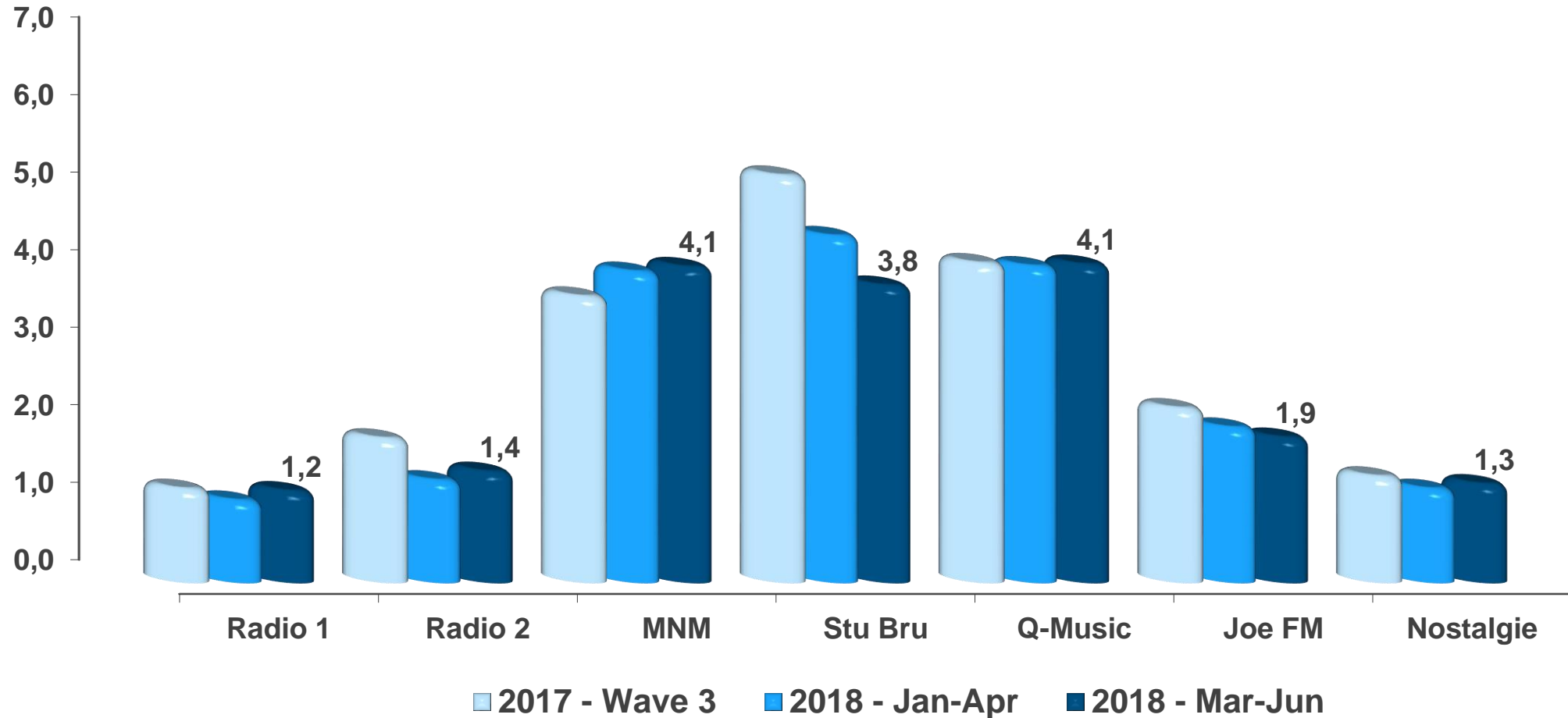
Key Radio Figures

KEY RADIO FIGURES NORTH

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

Source: 2017 CIM Radio (2017) New CIM RAM (2018)

Warning: New methodology in 2018 - CIM recommends not to compare 2018 figures with older waves

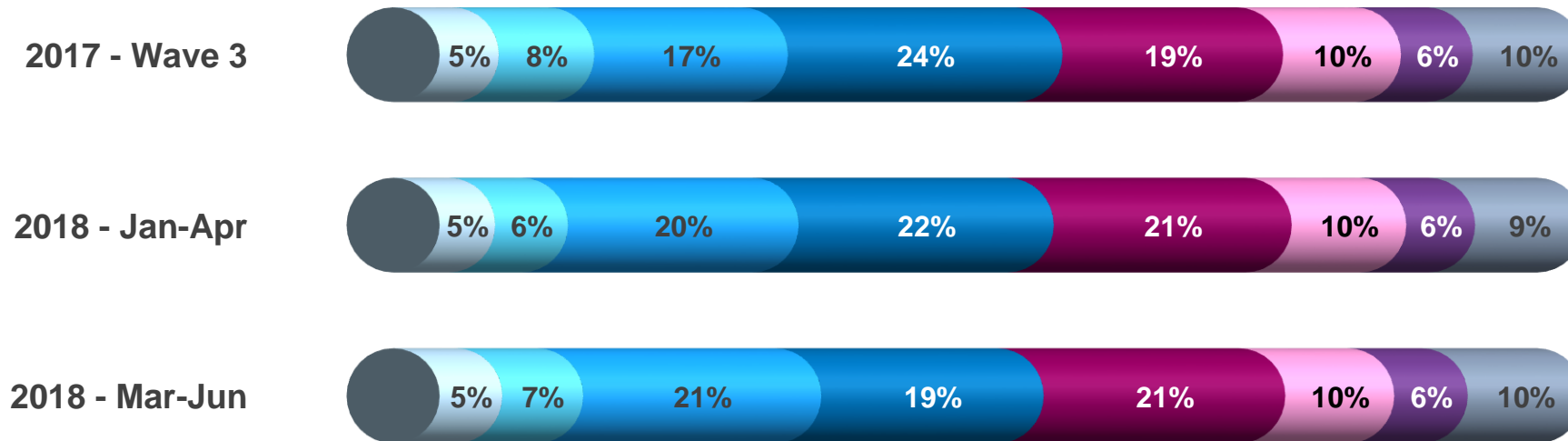


KEY RADIO FIGURES NORTH

Audience shares on ALL 18-44 - 07:00-19:00

Source: 2017 CIM Radio (2017) New CIM RAM (2018)

Warning: New methodology in 2018 - CIM recommends not to compare 2018 figures with older waves



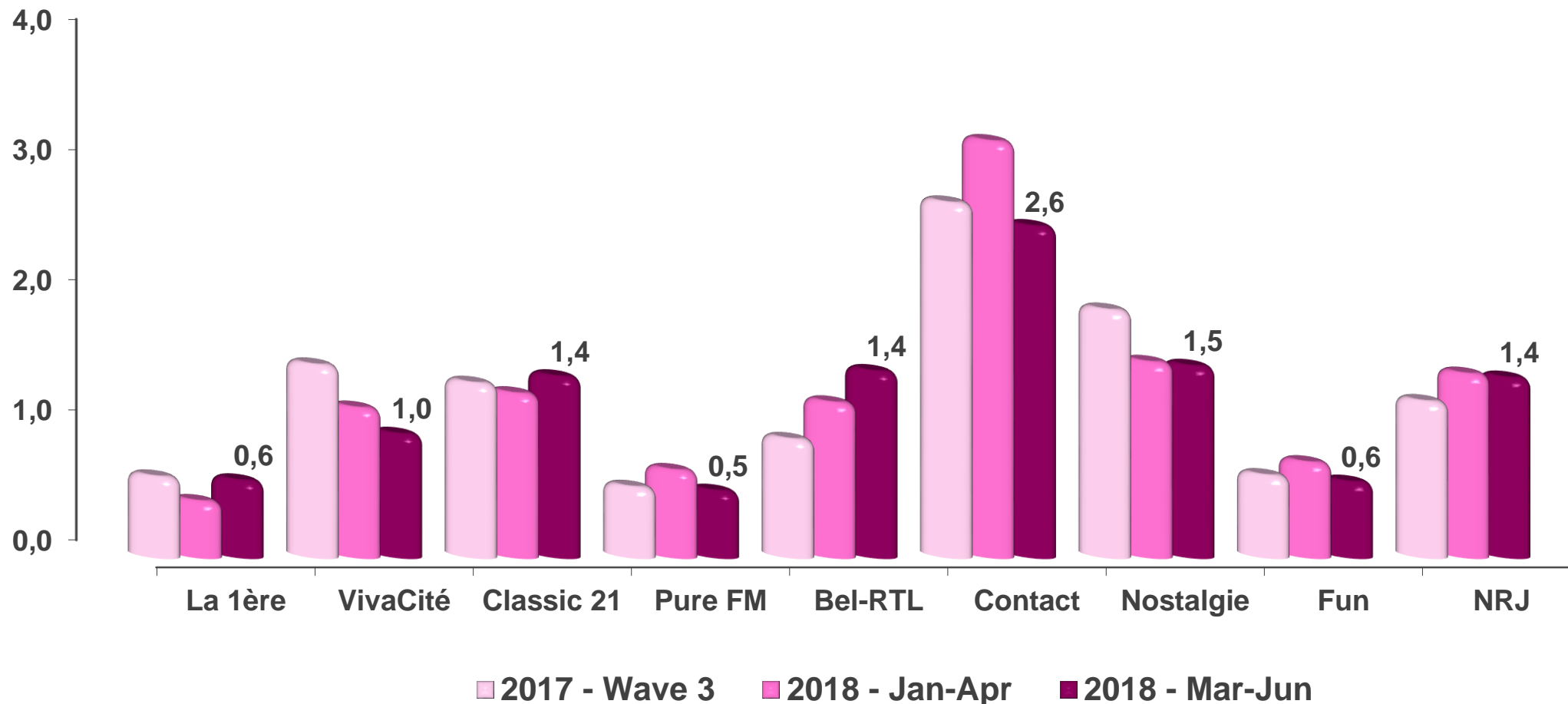
■ Radio 1 ■ Radio 2 ■ MNM ■ Stu Bru
■ Q-Music ■ Joe FM ■ Nostalgie ■ Other

KEY RADIO FIGURES SOUTH

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

Source: 2017 CIM Radio (2017) New CIM RAM (2018)

Warning: New methodology in 2018 - CIM recommends not to compare 2018 figures with older waves

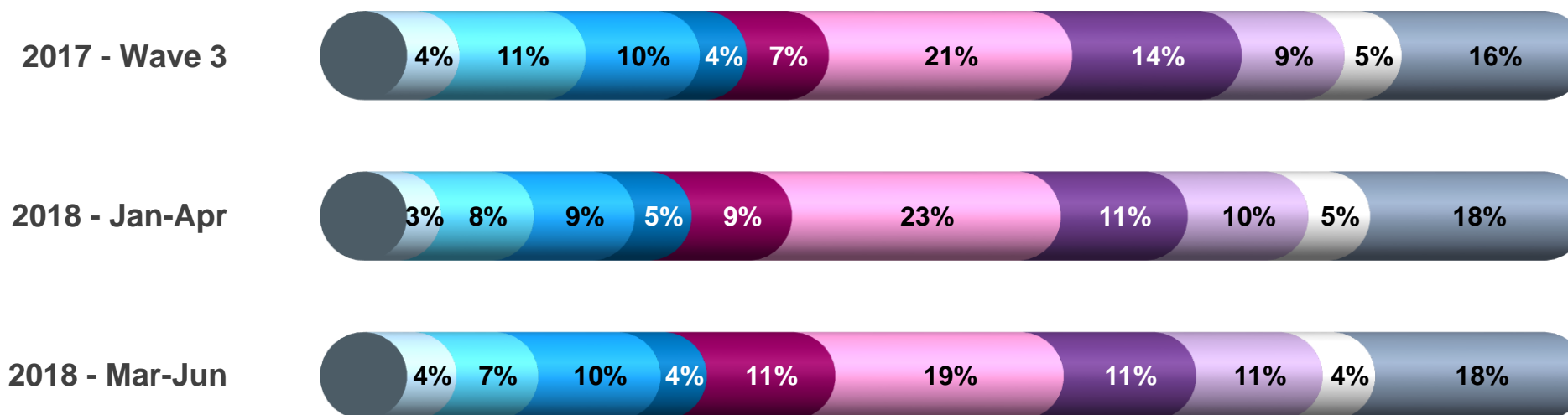


KEY RADIO FIGURES NORTH

Audience shares on ALL 18-44 - 07:00-19:00

Source: 2017 CIM Radio (2017) New CIM RAM (2018)

Warning: New methodology in 2018 - CIM recommends not to compare 2018 figures with older waves



La 1ère
 VivaCité
 Classic 21
 Pure FM
 Bel-RTL

Contact
 Nostalgie
 NRJ
 Fun Radio
 Other



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	260.337	↓ 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 (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	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

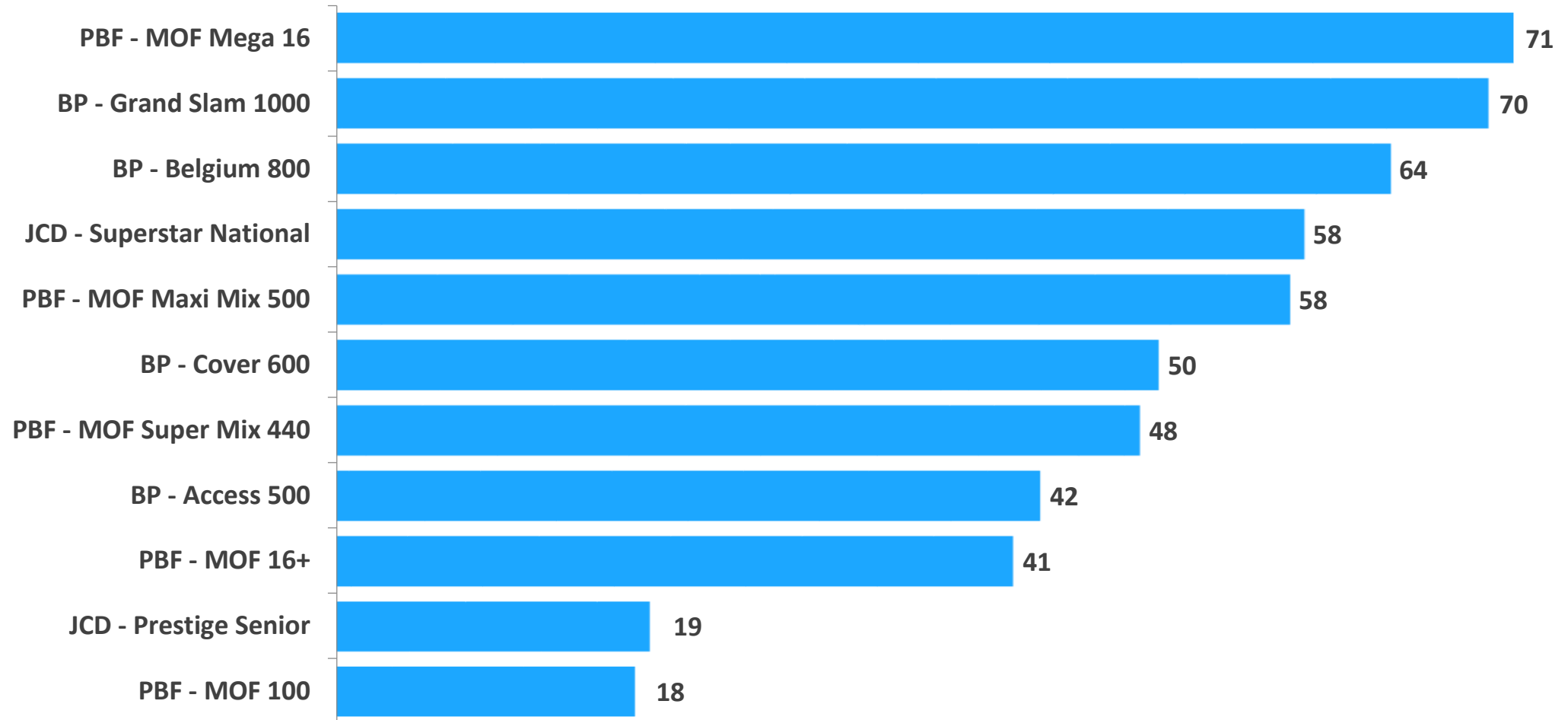


OOH ratings

Key OOH Figures - Panoramic & Classic billboards

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

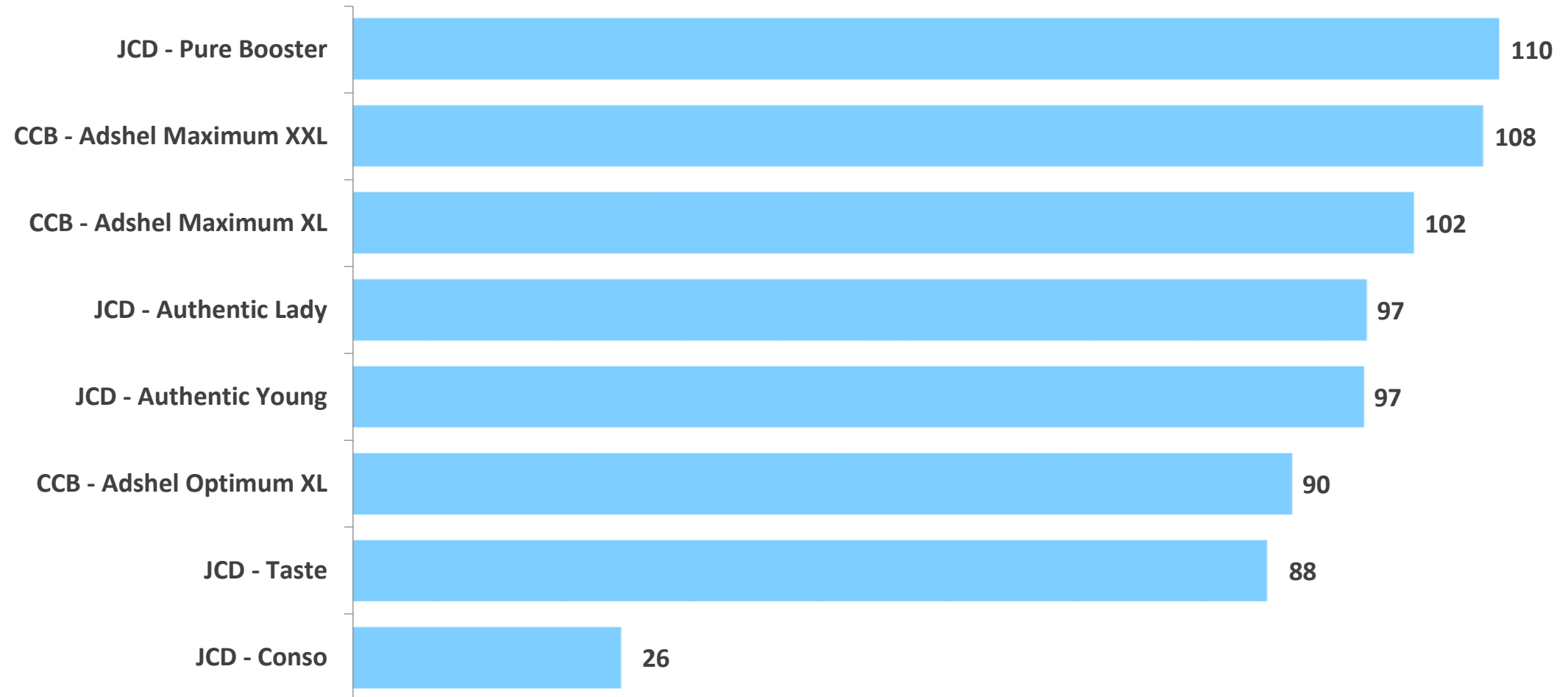
Source: CIM OOH 2017-01 / * : Visibility adjusted Rating Point



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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