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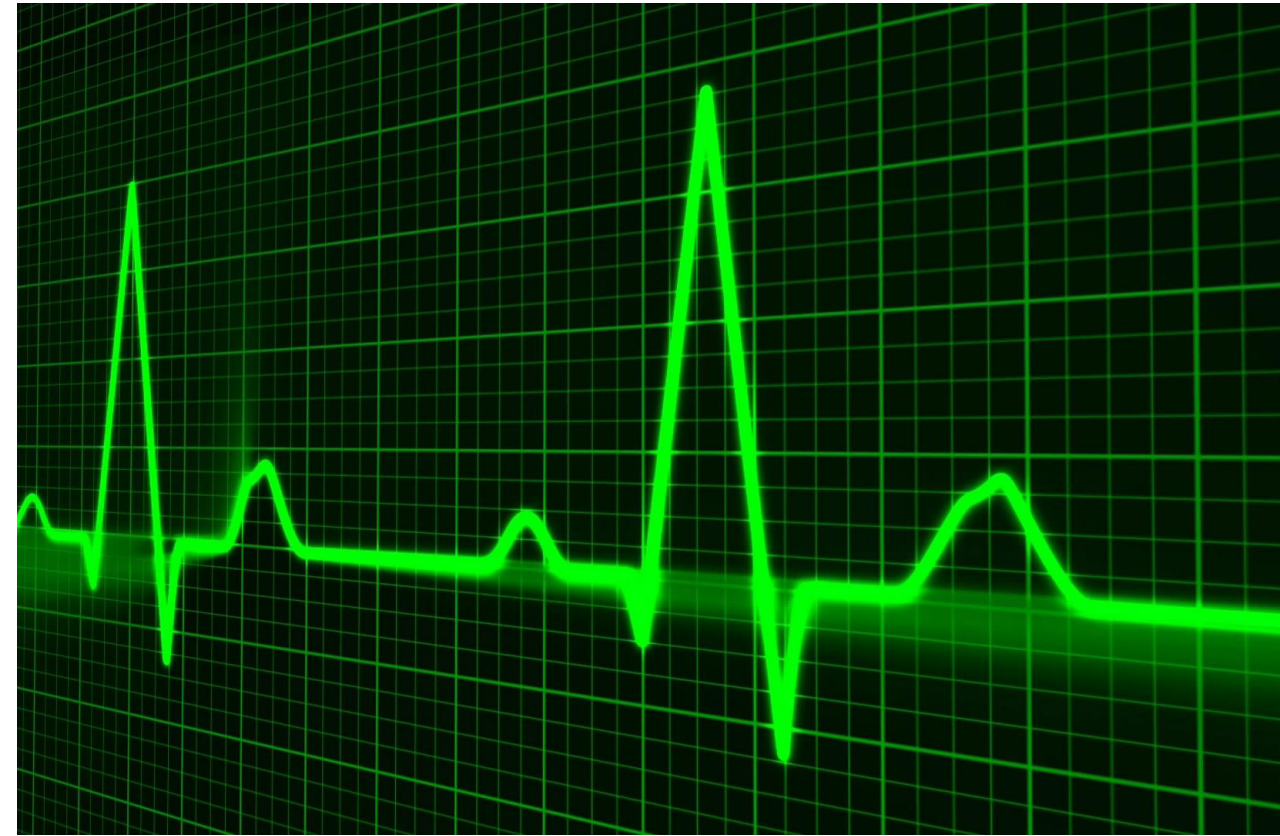
CONNECTIONS AGENCY



intelligence  
Market & Business

# MARKET PERFORMANCES BAROMETER

May 2019



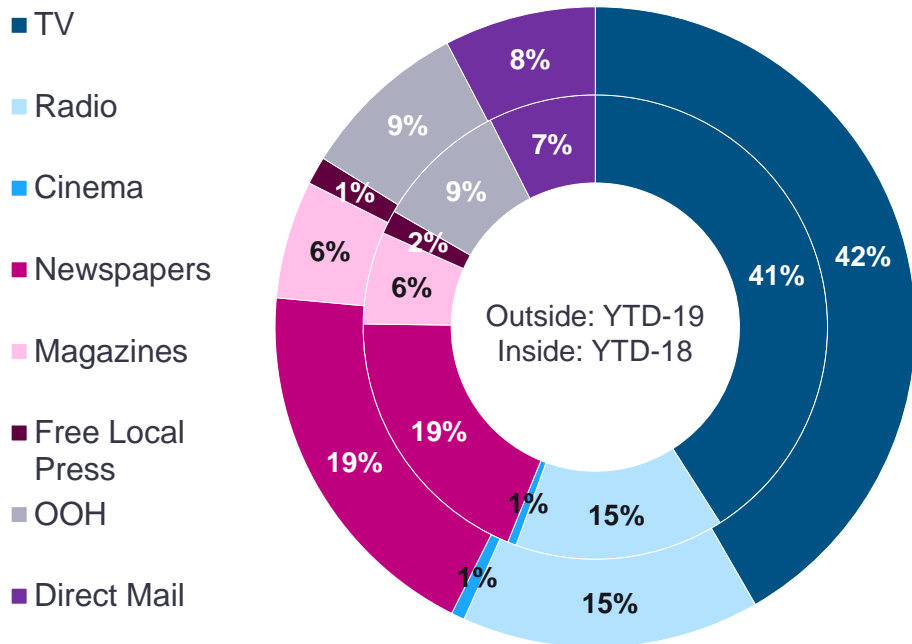
# Gross Media Investments Evolution

# GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Apr 2019

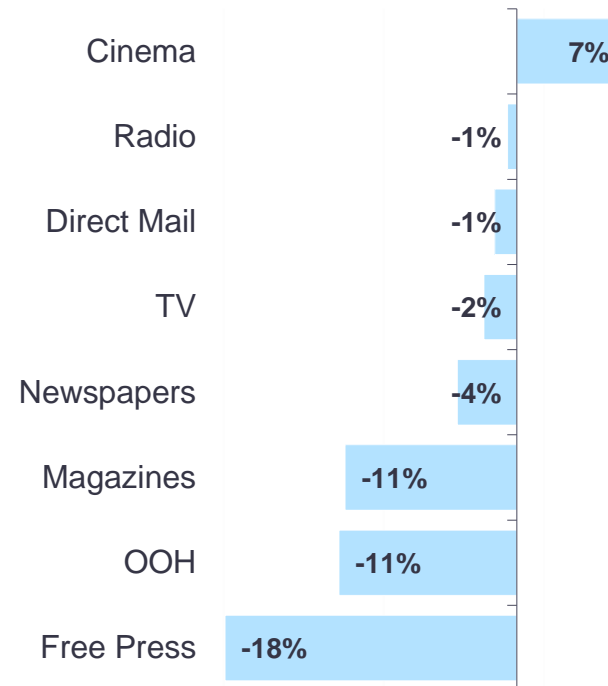
NB : 1) No Internet figures in MDB for 2018 & 2019. 2) Direct Mail : New in 2019.

Market	National	North	South
<ul style="list-style-type: none"> <li>■ € Mo</li> <li>■ vs YTD-18</li> <li>■ % Region</li> </ul>	1.212,0 - 3,7% 100%	735,2 - 1,4% 60%	476,8 - 7,0% 40%

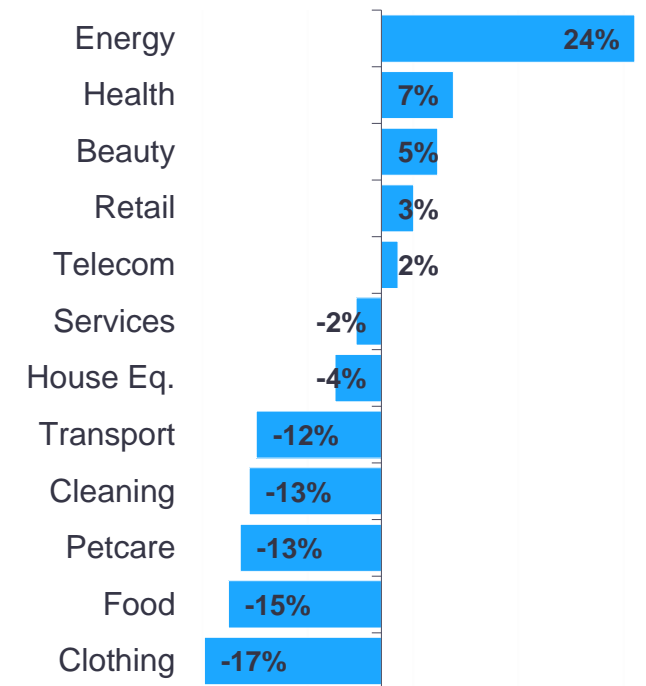
**Media Mix Evol.**



**Media Evol. (vs YTD-18)**



**EcoGroups Evol. (vs YTD-18)**



# MDB TOP 30 ADVERTISERS - Jan-Apr 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	COLRUYT GROUP	32,4	↑ 106
2	PROCTER & GAMBLE	31,2	↓ 84
3	D'IETEREN GROUP	28,6	↓ 86
4	PSA GROUPE	21,8	↑ 108
5	RECKITT & BENCKISER	16,9	→ 100
6	PROXIMUS GROUP	16,6	↓ 88
7	AHOLD DELHAIZE	15,0	↑ 145
8	UNILEVER	14,8	↓ 96
9	COCA-COLA COMPANY	14,1	↓ 76
10	TELENET GROUP HOLDING	13,0	↑ 109
11	VINTED	12,7	-
12	RENAULT-NISSAN ALLIANCE	11,0	↓ 78
13	CARREFOUR GROUP	11,0	↑ 133
14	FERRERO	9,8	↑ 135
15	THE WALT DISNEY COMPANY	9,2	↑ 141

Rank	ADV.GROUP	Gross Inv.	vs YTD-18
16	FIAT CHRYSLER AUTOMOBILES	8,9	↓ 83
17	ORANGE	8,9	↓ 94
18	BEIERSDORF	7,9	↑ 109
19	L'OREAL GROUP	7,8	↓ 95
20	METRO GROUP	7,8	↑ 150
21	MONDELEZ INTERNATIONAL	7,8	↓ 68
22	LOTERIE NATIONALE	7,7	↑ 105
23	BELFIUS	6,8	↓ 62
24	GROUPE 3 SUISES	6,6	↓ 83
25	DAIMLER BENZ GROUP	5,9	↑ 133
26	AS WATSON	5,9	↑ 123
27	HENKEL	5,8	↑ 141
28	BMW GROUP BELGIUM	5,7	↓ 87
29	PERRIGO	5,5	↑ 155
30	ALDI	5,5	↑ 145



# Key TV figures

# Key TV figures North - May-19

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		May-19	YTD	May-19	YTD	May-19	YTD
VTM	PRP 18-54	5,9	6,9	22,4	24,5	1.162	895
Q2	PRP 18-44	1,7	1,8	7,5	7,3	1.237	892
VITAYA	PRP 18-54	1,3	1,3	5,1	4,8	1.316	921
CAZ	MEN 18-54	0,5	0,5	2,1	2,2	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	3,8	3,6	14,3	12,9	987	889
VIJF	PRP 18-54	1,7	1,7	6,4	6,0	788	779
ZES	PRP 18-54	0,5	0,6	1,7	2,1	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	26,3	28,3				
Total TV	PRP 18-44	22,5	24,7				
Total TV	MEN 18-54	21,9	23,2				

# Key TV indexes North - May-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	
		May-19	YTD	May-19	YTD	May-19	YTD
VTM	PRP 18-54	↑ 102	↓ 95	↓ 94	↓ 97	✗ 105	✗ 105
Q2	PRP 18-44	↓ 75	↓ 83	↓ 73	↓ 86	✗ 123	✗ 115
VITAYA	PRP 18-54	↑ 104	↑ 104	↓ 95	↑ 106	✗ 144	✗ 129
CAZ	MEN 18-54	→ 100	→ 100	↓ 93	↑ 103	Package	Package
VIER	PRP 18-54	↑ 119	↑ 117	↑ 109	↑ 119	✓ 84	✓ 95
VIJF	PRP 18-54	↑ 122	↓ 90	↑ 111	↓ 92	✓ 81	✗ 102
ZES	PRP 18-54	↓ 71	↓ 87	↓ 65	↓ 88	Package	Package
Total TV	PRP 18-54	↑ 109	↓ 98				
Total TV	PRP 18-44	↑ 103	↓ 96				
Total TV	MEN 18-54	↑ 107	↓ 98				

# Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-May - 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
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	29,6%	30,0%	29,9%	<b>29,6%</b>	99
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	85,5%	86,3%	83,9%	<b>82,4%</b>	98
	VHS + DVD player + Blue Ray	"	4,6%	3,9%	3,6%	<b>2,4%</b>	68
	Video on demand + Digital recorder	"	8,5%	8,6%	11,1%	<b>13,6%</b>	122
	Game console and other devices (3)	"	1,3%	1,2%	1,4%	<b>1,6%</b>	111
<b>% Time shift viewing (4)</b>	All Channels	"	16,3%	24,9%	26,7%	<b>30,2%</b>	113
	Main Channels (5)	"	20,1%	28,0%	30,5%	<b>34,1%</b>	112
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	86	87	87	<b>87</b>	
	Main channels (5) - TSV	"	28	31	34	<b>35</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	121	111	108	<b>100</b>	92
	All TV channels (TSV)	"	20	31	33	<b>35</b>	105
	All TV channels (Live + TSV)	"	141	143	141	<b>134</b>	95
	Other TV Screen Usage	"	31	30	36	<b>38</b>	106
	Total TV Screen Usage	"	172	173	176	<b>172</b>	98



# Key TV figures South - May-19

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		May-19	YTD	May-19	YTD	May-19	YTD
RTL-TVI	PRP 18-54	6,6	7,5	24,5	26,8	991	802
Club-RTL	MEN 18-54	1,6	1,5	7,9	7,1	874	841
Plug-RTL	ALL 15-34	0,8	0,7	4,9	4,2	935	776
La Une	PRP 18-54	3,6	3,8	13,3	13,6	736	686
La Deux	PRP 18-54	1,6	1,4	6,0	4,9	629	659
AB3	PRP 18-44	2,2	2,8	9,8	11,6	934	653
TF1	PRP 18-54	3,0	3,2	11,4	11,4	<i>Package</i>	<i>Package</i>
TTV	PRP 18-54	26,8	28,0				
TTV	PRP 18-44	22,6	23,9				
TTV	ALL 15-34	15,3	16,1				
TTV	MEN 18-54	20,6	21,3				

# Key TV indexes South - May-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	
		May-19	YTD	May-19	YTD	May-19	YTD
RTL-TVI	PRP 18-54	↓ 97	↓ 95	↓ 89	↓ 98	✘ 106	✓ 98
Club-RTL	MEN 18-54	↑ 123	↓ 96	↑ 115	⇒ 100	✓ 88	✓ 97
Plug-RTL	ALL 15-34	↑ 132	↓ 93	↑ 113	↓ 94	✘ 106	✓ 99
La Une	PRP 18-54	↑ 117	↑ 105	↑ 108	↑ 108	✓ 98	✓ 100
La Deux	PRP 18-54	↑ 106	↓ 87	↓ 98	↓ 89	✓ 96	✘ 102
AB3	PRP 18-44	↓ 97	↑ 111	↓ 91	↑ 115	✘ 126	✓ 98
TF1	PRP 18-54	⇒ 99	↓ 80	↓ 92	↓ 82	Package	Package
TTV	PRP 18-54	↑ 108	↓ 97				
TTV	PRP 18-44	↑ 107	↓ 97				
TTV	ALL 15-34	↑ 117	⇒ 99				
TTV	MEN 18-54	↑ 106	↓ 96				

# Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-May - 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
<b>Rating (%)</b>	TSU (Total Screen Usage) (1)	17-23:00	34,9%	34,1%	33,2%	<b>32,9%</b>	99
<b>Audience share TSU (%) (2)</b>	Total channels (Live + TSV)	"	81,4%	78,8%	75,6%	<b>74,1%</b>	98
	VHS + DVD player + Blue Ray	"	6,9%	7,2%	6,6%	<b>5,1%</b>	77
	Video on demand + Digital recorder	"	11,0%	13,3%	17,0%	<b>19,9%</b>	117
	Game console and other devices (3)	"	0,8%	0,7%	0,8%	<b>1,0%</b>	123
<b>% Time shift viewing (4)</b>	All Channels	"	13,0%	18,1%	21,7%	<b>22,0%</b>	102
	Main Channels (5)	"	14,1%	20,0%	22,8%	<b>22,6%</b>	99
<b>Commercial breaks rating vs full daypart rating Index</b>	Main channels (5) - Live	"	90	89	87	<b>88</b>	
	Main channels (5) - TSV	"	51	51	50	<b>52</b>	
<b>ATV (Average daily viewing time) in minutes</b>	All TV channels (Live)	Total day	163	147	133	<b>131</b>	98
	All TV channels (TSV)	"	20	28	29	<b>30</b>	102
	All TV channels (Live + TSV)	"	183	174	162	<b>161</b>	99
	Other TV Screen Usage	"	51	55	61	<b>65</b>	108
	Total TV Screen Usage	"	234	229	223	<b>226</b>	102



# 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 - May-19

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.352.176	11	RTL.be	298.930
2	Nieuwsblad	1.182.587	12	Le Soir	284.235
3	2dehands.be-2ememain.be	556.317	13	Immoweb	247.999
4	Sudinfo	449.588	14	Knack-Le Vif	205.095
5	VRT	411.387	15	Het Belang van Limburg	200.381
6	DH.be	383.806	16	De Morgen	190.879
7	De Standaard	366.006	17	VTM	178.576
8	RTBF.be	352.031	18	La Libre.be	170.491
9	Sporza	337.152	19	L'Avenir.net	163.280
10	Gazet van Antwerpen	322.971	20	7sur7.be	143.661

# 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

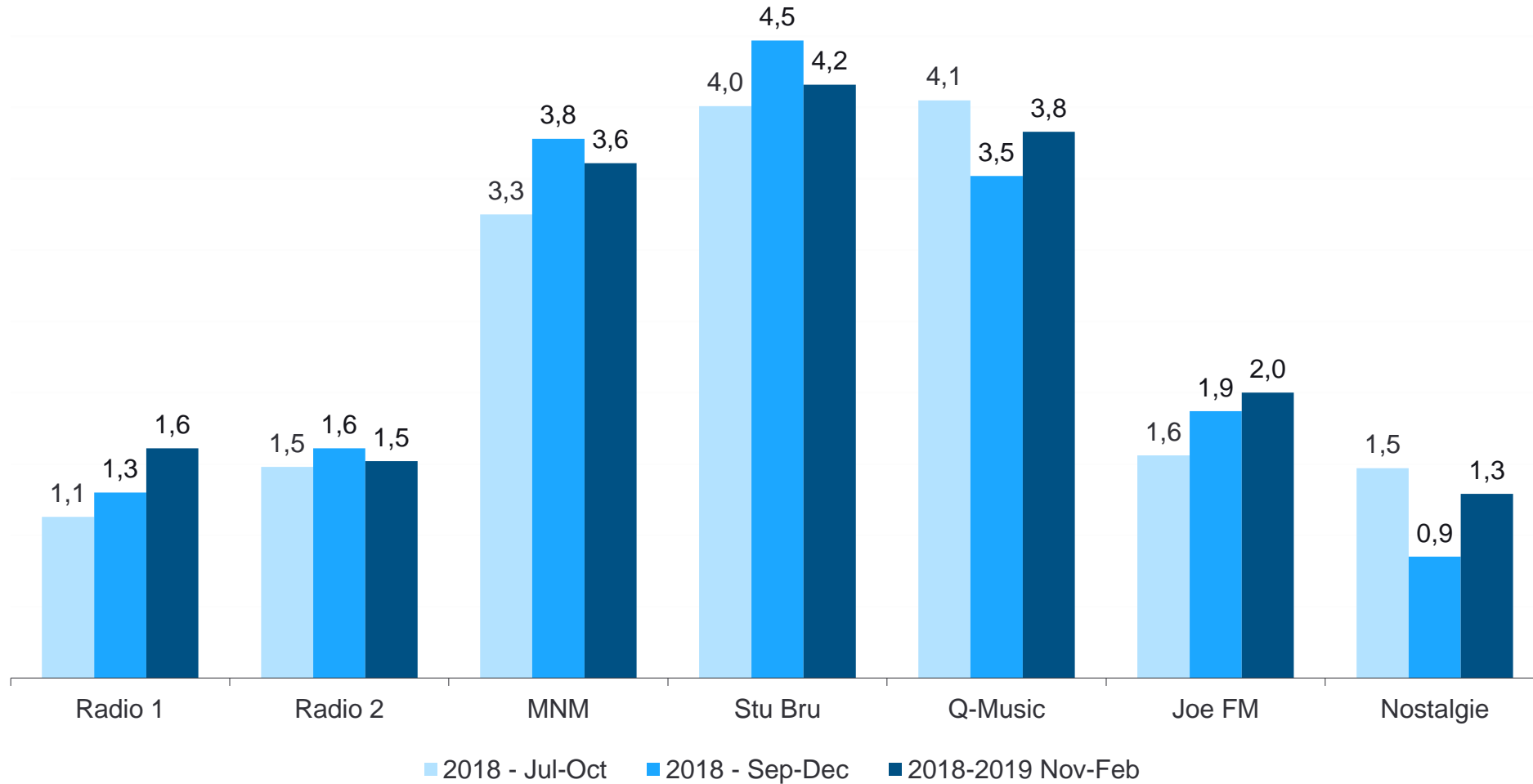


# Key Radio figures



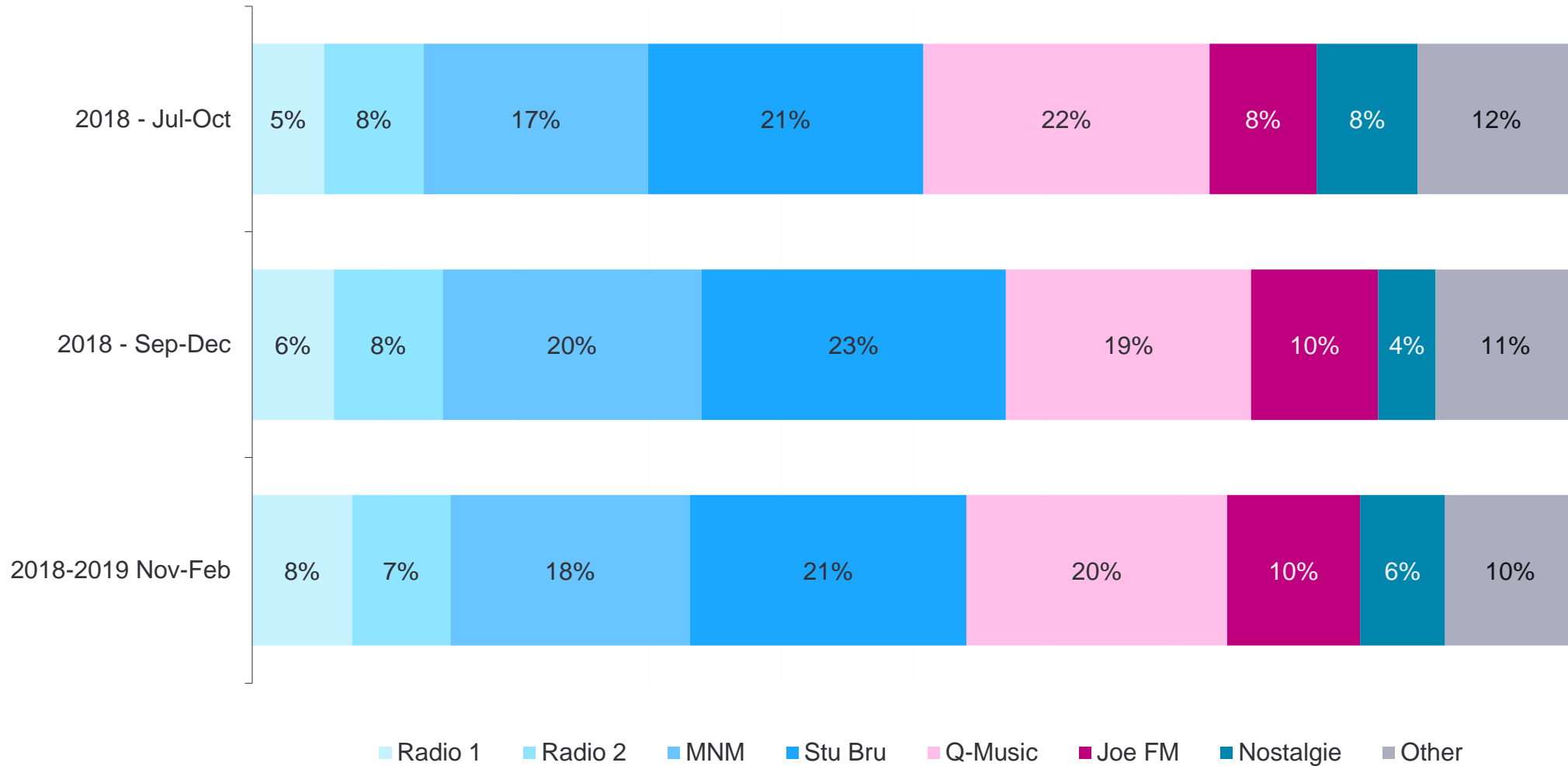
# KEY RADIO FIGURES NORTH

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



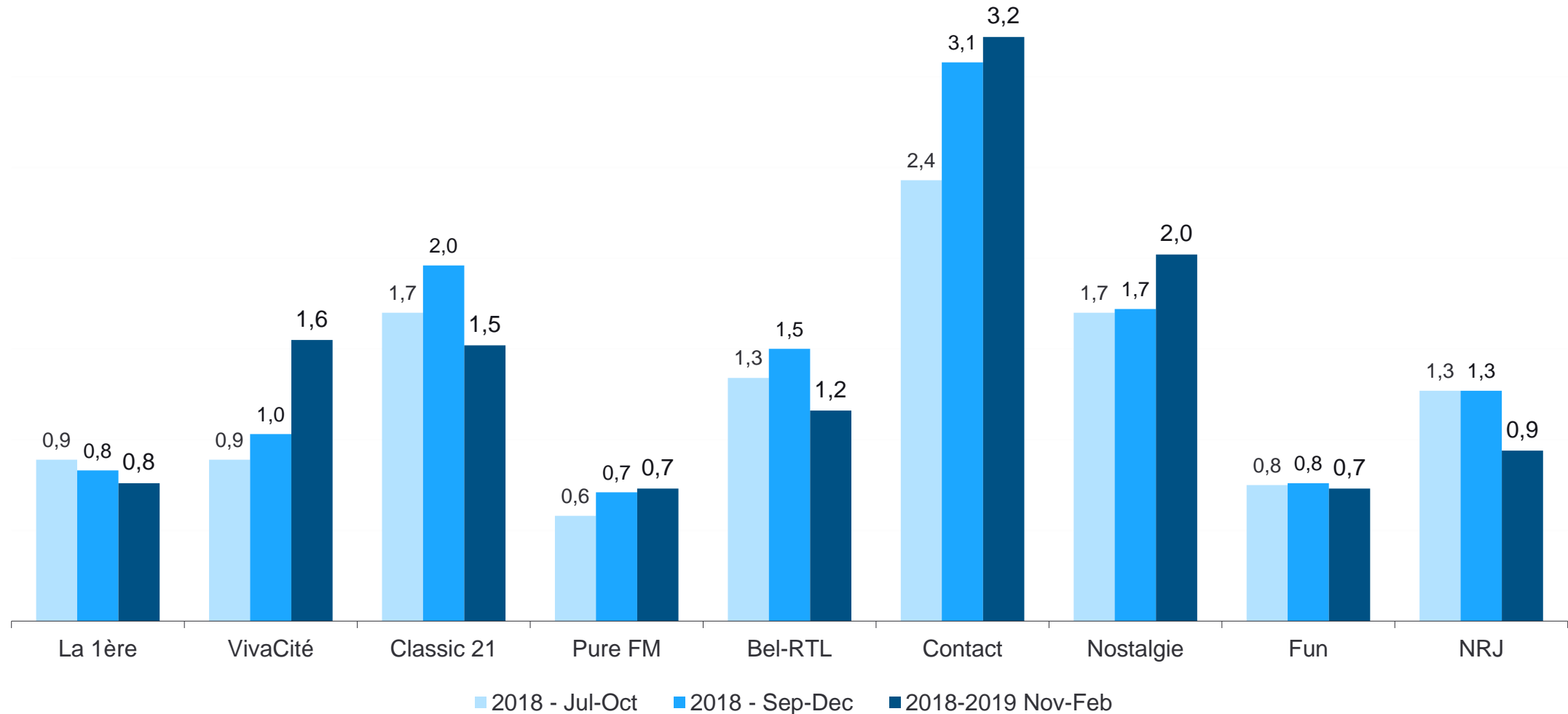
# KEY RADIO FIGURES NORTH

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



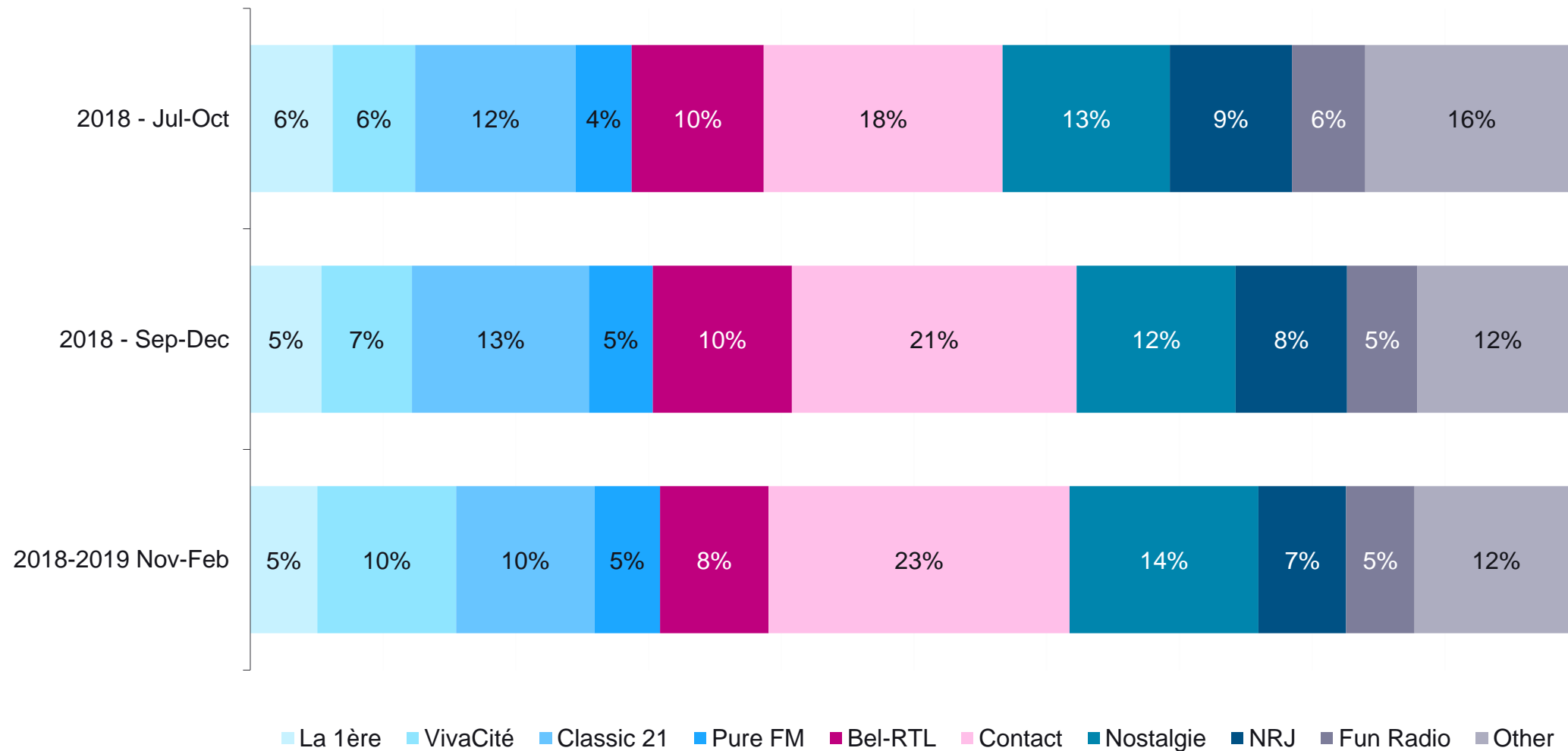
# KEY RADIO FIGURES SOUTH

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
<b>Total North</b>	<b>851.167</b>	<b>↓ 99</b>	<b>13,8%</b>	<b>↑ 130</b>

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
<b>Total South</b>	<b>319.401</b>	<b>→ 100</b>	<b>17,5%</b>	<b>↑ 162</b>

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

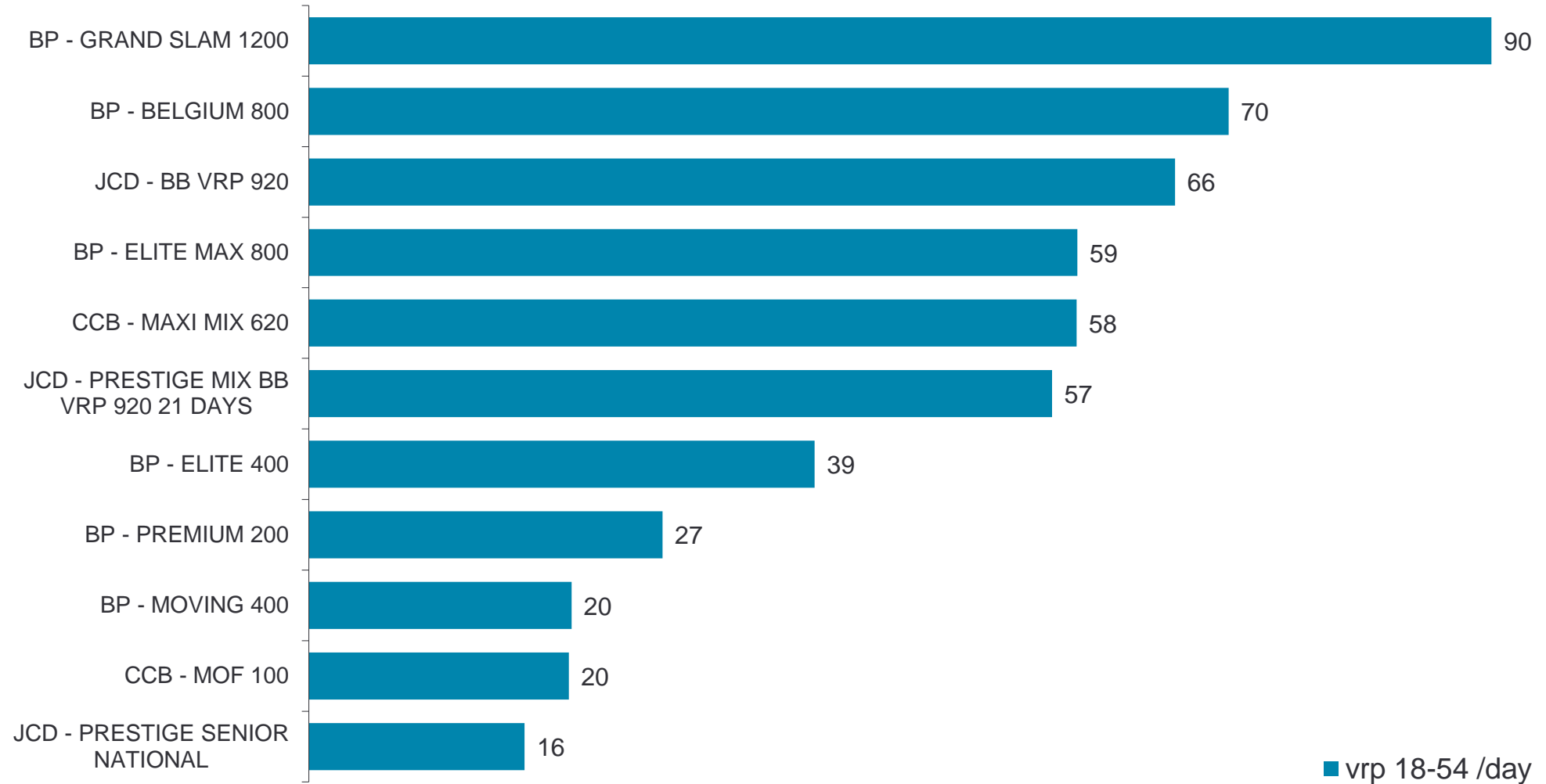
Categories	NL-speaking		FR-speaking		Both languages	
	Circulation	vs 2017	Circulation	vs 2017	Circulation	vs 2017
Television	631.503	↓ 94	400.465	↓ 95		
Women	338.508	↓ 92	167.509	↓ 89		
Business & News	114.065	↓ 96	135.668	↓ 94	58.814	↑ 108
Generation (Youth/Senior)			15.716	↓ 96	122.262	↑ 106
Men	26.104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

