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CONNECTIONS AGENCY

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Gross Media Investments Evolution

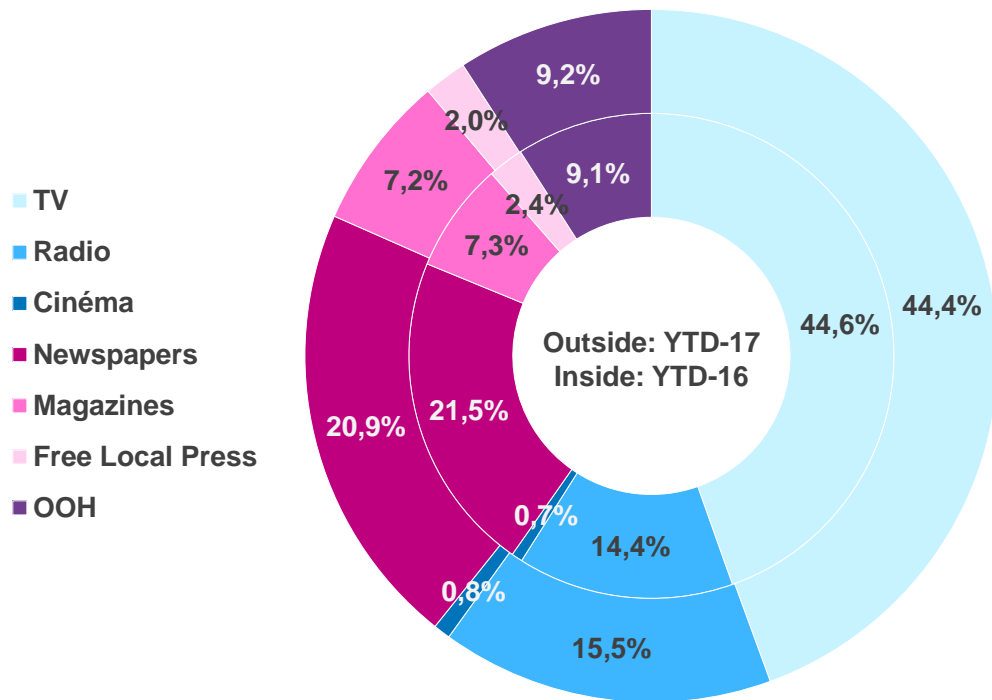
GROSS MEDIA INVESTMENTS EVOLUTION

Jan-Oct 2017

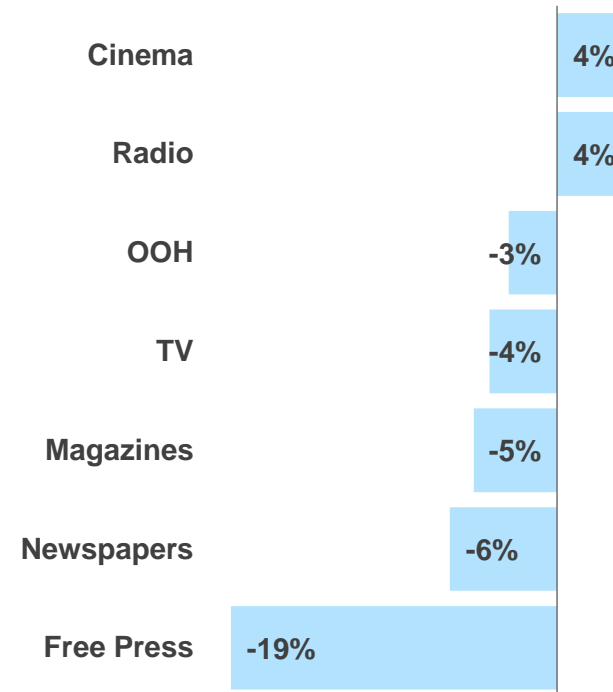
Source: MDB / Nielsen

Market	National	North	South
<ul style="list-style-type: none"> • € Mo • vs YTD-16 * • % Region 	<ul style="list-style-type: none"> • 2.993,0 • - 3,6% • 100% 	<ul style="list-style-type: none"> • 1.806,5 • - 5,4% • 60% 	<ul style="list-style-type: none"> • 1.186,6 • - 0,9% • 40%

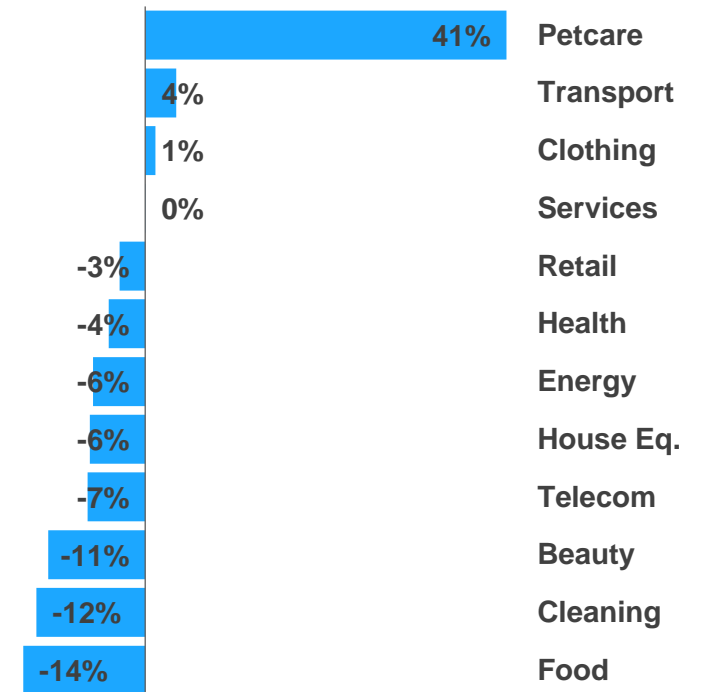
Media Mix Evol.



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-Oct 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	94,6	↓ 92	16	CARREFOUR GROUP	21,7	↓ 78
2	D'IETEREN GROUP	67,2	↑ 102	17	TRIVAGO	20,5	↑ 125
3	RECKITT & BENCKISER	49,9	↓ 76	18	DAIMLER BENZ GROUP	20,4	↓ 94
4	COCA-COLA COMPANY	48,0	↓ 96	19	BEIERSDORF	20,2	↓ 94
5	UNILEVER	47,3	↓ 75	20	LOTERIE NATIONALE	20,1	↑ 106
6	PROXIMUS GROUP	39,3	↓ 72	21	AHOLD DELHAIZE	19,8	↓ 75
7	TELENET GROUP	35,7	↑ 109	22	GLAXOSMITHKLINE	19,6	↑ 124
8	PSA PEUGEOT CITROEN	33,8	↑ 104	23	L'OREAL GROUP	19,3	↓ 74
9	COLRUYT GROUP	32,7	↑ 114	24	NETHYS	19,2	↓ 92
10	RENAULT-NISSAN ALLIANCE	32,6	↓ 97	25	NESTLE GROUP	18,8	↓ 76
11	ORANGE	32,2	↑ 118	26	LIDL & CO	18,0	→ 100
12	FIAT CHRYSLER AUTOMOBILES	26,6	↑ 148	27	BNP-PARIBAS	17,3	↑ 157
13	MONDELEZ INTERNATIONAL	24,4	↓ 89	28	GENERAL MOTORS CORP.	16,7	↓ 92
14	DANONE GROUP	23,8	↓ 60	29	THE WALT DISNEY COMPANY	15,5	↑ 130
15	BMW GROUP	22,8	↑ 113	30	ANHEUSER BUSCH INBEV	14,8	↓ 65

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



Key TV Figures

Key TV figures North - Nov-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	
		Nov-17	YTD	Nov-17	YTD	Nov-17	YTD
VTM	PRP 18-54	8,0	7,0	25,9	25,5	1.070	897
Q2	PRP 18-44	2,0	2,1	7,3	8,5	1.009	840
VITAYA	PRP 18-54	1,4	1,2	4,5	4,5	816	768
VIER	PRP 18-54	4,6	3,1	14,9	11,4	1.095	969
VIJF	PRP 18-54	1,5	1,5	4,8	5,5	1.008	726
Total TV	PRP 18-54	31,1	27,3				
Total TV	PRP 18-44	27,3	24,2				

Key TV indexes North - Nov-17

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Nov-17 vs P-1	YTD	Nov-17 vs P-1	YTD	Nov-17 vs Channel's Objective	YTD
VTM	PRP 18-54	↓ 95	↑ 103	↓ 95	↑ 102	× 113	× 104
Q2	PRP 18-44	↓ 91	↓ 96	↓ 93	↓ 96	× 115	× 103
VITAYA	PRP 18-54	↑ 119	↑ 115	↑ 119	↑ 113	! 101	× 105
VIER	PRP 18-54	↘ 99	↓ 97	↓ 98	↓ 96	× 112	× 108
VIJF	PRP 18-54	↑ 106	↑ 106	↑ 106	↑ 104	× 129	✓ 98
Total TV	PRP 18-54	↔ 101	↔ 101				
Total TV	PRP 18-44	↓ 97	→ 100				

Time Shift Viewing & Other TV Screen Usage - NORTH

Period: Jan-Nov - 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	29,0%	28,2%	27,9%	28,4%	102
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	88,9%	87,5%	85,8%	85,6%	100
	VHS + DVD player + Blue Ray	"	3,2%	3,8%	4,3%	4,0%	92
	Video on demand + Digital recorder	"	6,4%	5,6%	8,6%	9,2%	107
	Game console and other devices (3)	"	1,5%	0,8%	1,3%	1,3%	100
% Time shift viewing (4)	All Channels	"	10,6%	12,8%	17,9%	23,8%	133
	Main Channels (5)	"	14,1%	15,6%	21,9%	26,7%	122
Commercial breaks rating vs full daypart rating	Main channels (5) - Live	"	87	88	85	87	
	Main channels (5) - TSV	"	25	27	28	31	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	132	125	113	107	95
	All TV channels (TSV)	"	13	15	21	29	136
	All TV channels (Live + TSV)	"	145	139	134	136	102
	Other TV Screen Usage	"	24	27	29	31	105
	Total TV Screen Usage	"	169	167	163	167	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 - Nov-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	
		Nov-17	YTD	Nov-17	YTD	Nov-17	YTD
RTL-TVI	PRP 18-54	8,8	7,7	27,1	26,7	939	804
Club-RTL	MEN 18-54	1,6	1,5	6,7	6,7	1.094	889
Plug-RTL	ALL 15-34	1,7	1,0	9,1	6,0	734	755
La Une	PRP 18-54	4,0	3,8	12,4	13,3	823	698
La Deux	PRP 18-54	1,9	1,6	6,0	5,4	613	575
AB3	PRP 18-44	2,8	2,3	10,0	9,2	686	597
TF1	PRP 18-54	4,5	4,3	14,0	14,8	908	930
TTV	PRP 18-54	32,2	28,9				
TTV	PRP 18-44	28,1	25,0				
TTV	ALL 15-34	18,9	17,0				
TTV	MEN 18-54	24,2	22,1				

Key TV indexes South - Nov-17

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Nov-17 vs P-1	YTD	Nov-17 vs P-1	YTD	Nov-17 vs Channel's Objective	YTD
RTL-TVI	PRP 18-54	↓ 94	↓ 94	↔ 99	↔ 101	✗ 109	✗ 106
Club-RTL	MEN 18-54	↓ 98	↔ 101	↑ 103	↑ 107	✗ 120	✗ 109
Plug-RTL	ALL 15-34	↑ 157	↓ 83	↑ 165	↓ 92	✓ 86	! 101
La Une	PRP 18-54	↓ 88	↓ 88	↓ 93	↓ 94	✓ 100	✗ 107
La Deux	PRP 18-54	↑ 117	↓ 77	↑ 123	↓ 82	✓ 92	! 101
AB3	PRP 18-44	↑ 107	↓ 93	↑ 112	↑ 102	✓ 92	✓ 100
TF1	PRP 18-54	↓ 83	↓ 86	↓ 87	↓ 93	✓ 97	✗ 103
TTV	PRP 18-54	↓ 95	↓ 93				
TTV	PRP 18-44	↓ 96	↓ 91				
TTV	ALL 15-34	↓ 94	↓ 90				
TTV	MEN 18-54	↓ 94	↓ 94				

Time Shift Viewing & Other TV Screen Usage - SOUTH

Period: Jan-Nov - 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	32,1%	32,5%	33,4%	32,5%	97
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	82,1%	80,8%	80,8%	78,1%	97
	VHS + DVD player + Blue Ray	"	5,6%	7,8%	7,0%	7,0%	99
	Video on demand + Digital recorder	"	9,9%	7,1%	11,4%	14,2%	124
	Game console and other devices (3)	"	2,4%	1,1%	0,9%	0,8%	91
% Time shift viewing (4)	All Channels	"	8,2%	8,9%	13,3%	18,7%	141
	Main Channels (5)	"	9,0%	10,0%	14,4%	20,2%	140
Commercial breaks rating vs full daypart rating	Main channels (5) - Live	"	88	89	89	88	
	Main channels (5) - TSV	"	41	47	52	52	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	159	159	157	139	88
	All TV channels (TSV)	"	12	13	20	27	133
	All TV channels (Live + TSV)	"	171	172	177	165	94
	Other TV Screen Usage	"	45	49	51	54	107
	Total TV Screen Usage	"	216	221	228	220	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 - Nov-17

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

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.134.594	11	RTL.be	237.509
2	Nieuwsblad	1.066.451	12	Le Soir	236.851
3	2dehands.be-2ememain.be	560.120	13	Het Belang van Limburg	211.974
4	De Standaard	373.812	14	Knack-Le Vif	210.996
5	VRT	321.143	15	Immoweb	204.166
6	Gazet van Antwerpen	304.160	16	De Morgen	161.887
7	Sudinfo	298.781	17	VTM	158.214
8	RTBF.be	249.542	18	La Libre.be	137.702
9	Sporza	248.042	19	L'Avenir.net	137.635
10	DH.be	239.465	20	7sur7.be	132.225

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

Source: COMSCORE

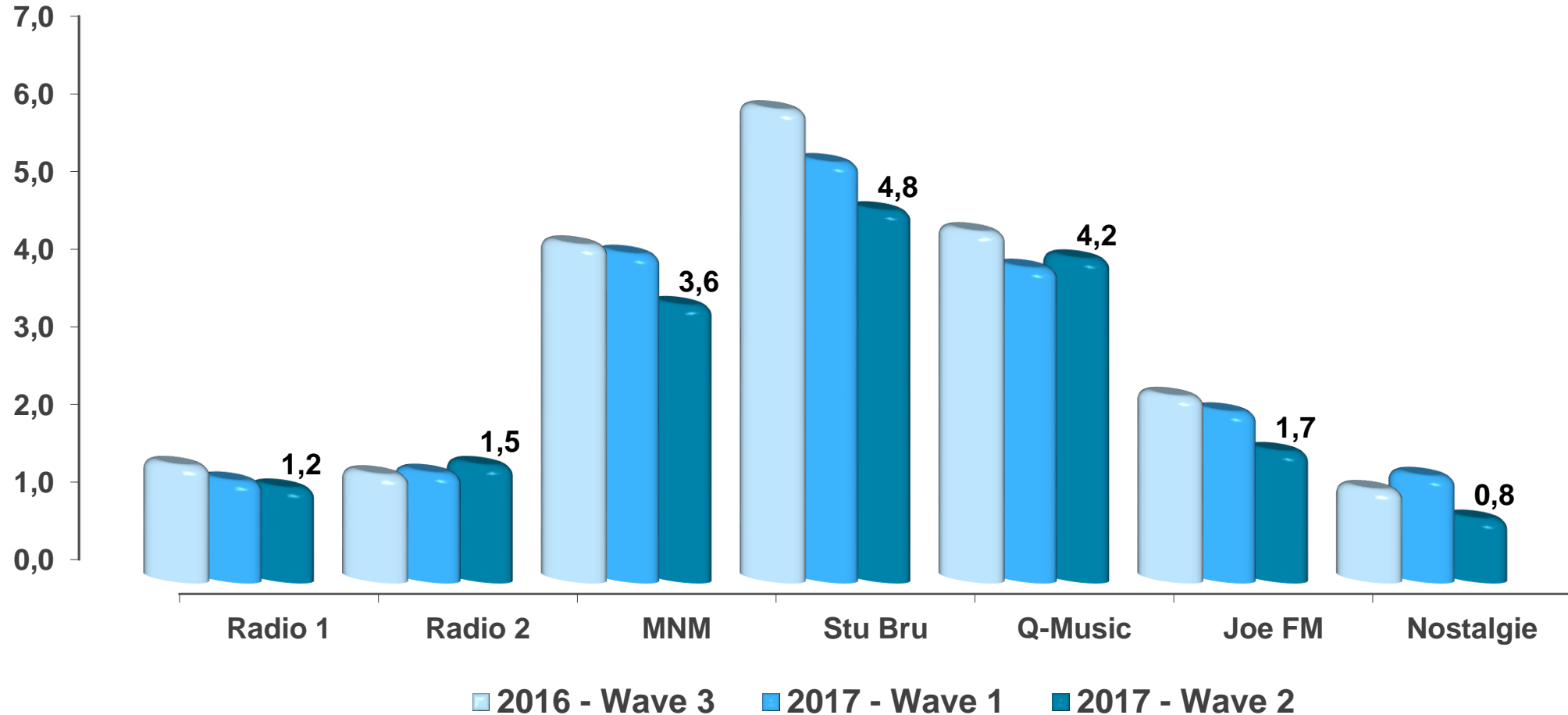
Website	Daily Visitors (000)
GOOGLE.BE	1.161
MSN.COM	1.096
MSN.BE	989
LINKEDIN.COM	840
FACEBOOK.COM	741
LIVE.COM	676
GOOGLE.COM	572
BING.COM	384
YOUTUBE.COM	361
YAHOO.COM	253



Key Radio Figures

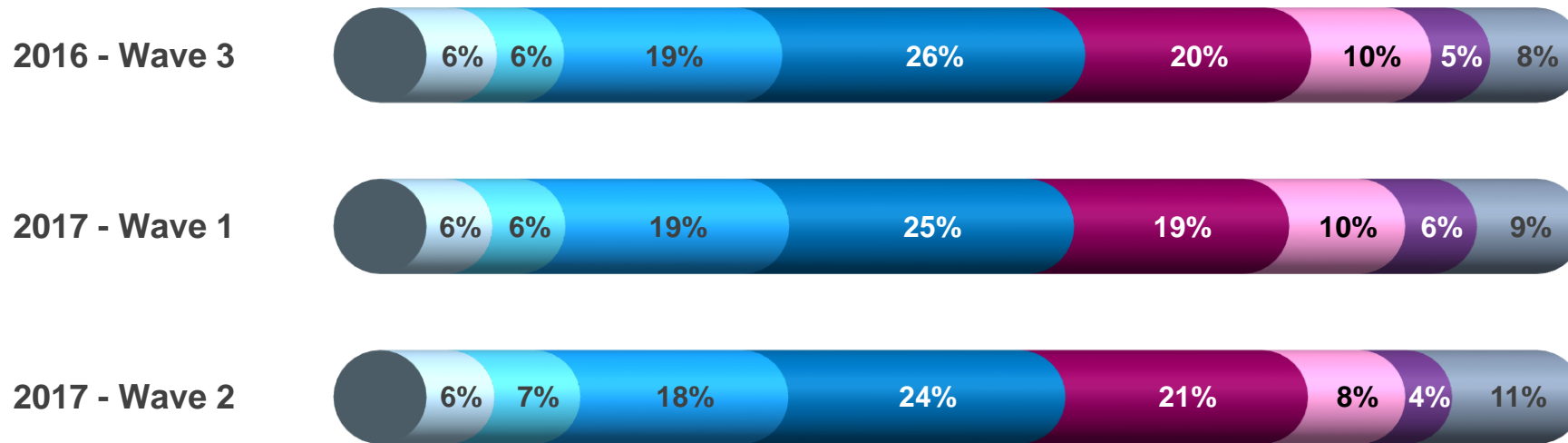
Key Radio Figures North - Average Rating (%) on ALL 18-44

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)

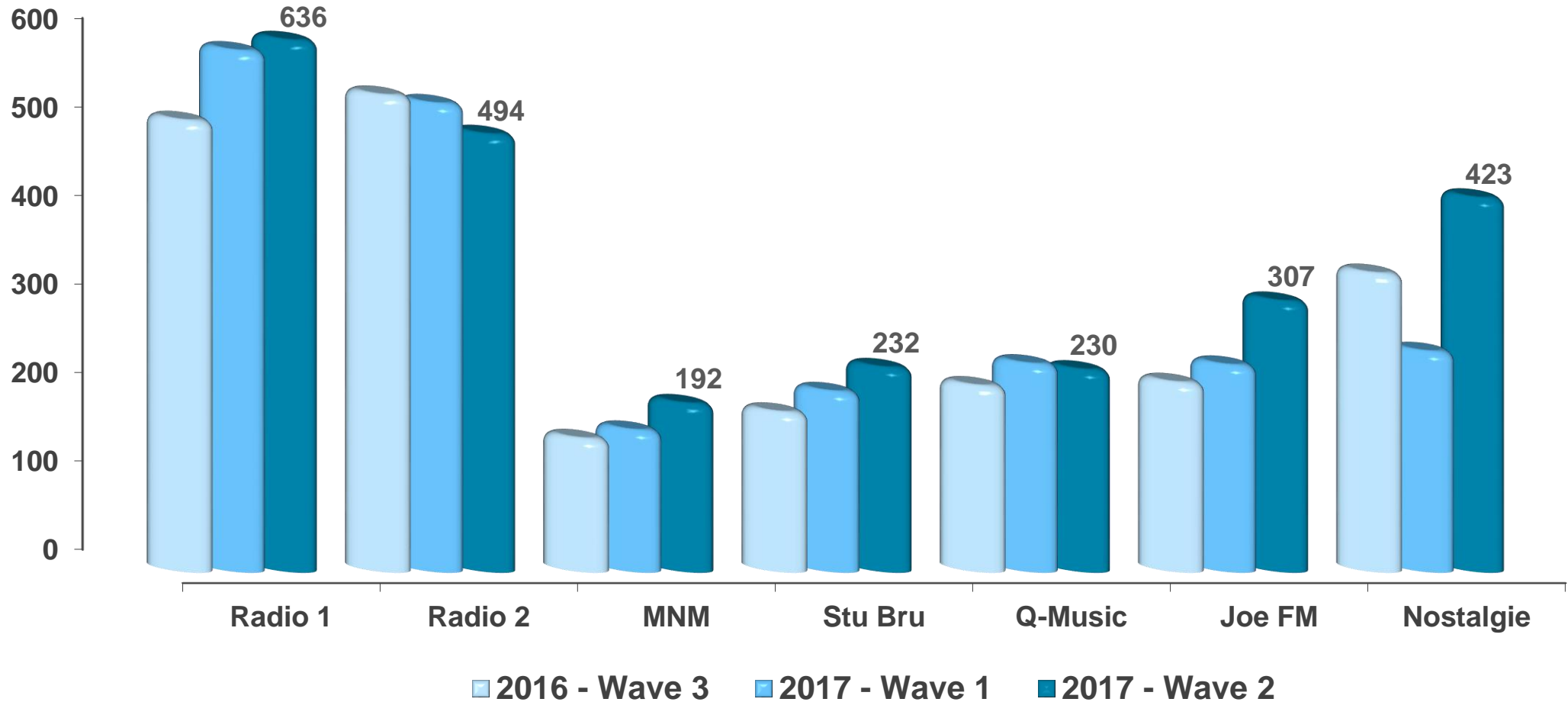


■ Radio 1 ■ Radio 2 ■ MNM ■ Stu Bru
■ Q-Music ■ Joe FM ■ Nostalgie ■ Other

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

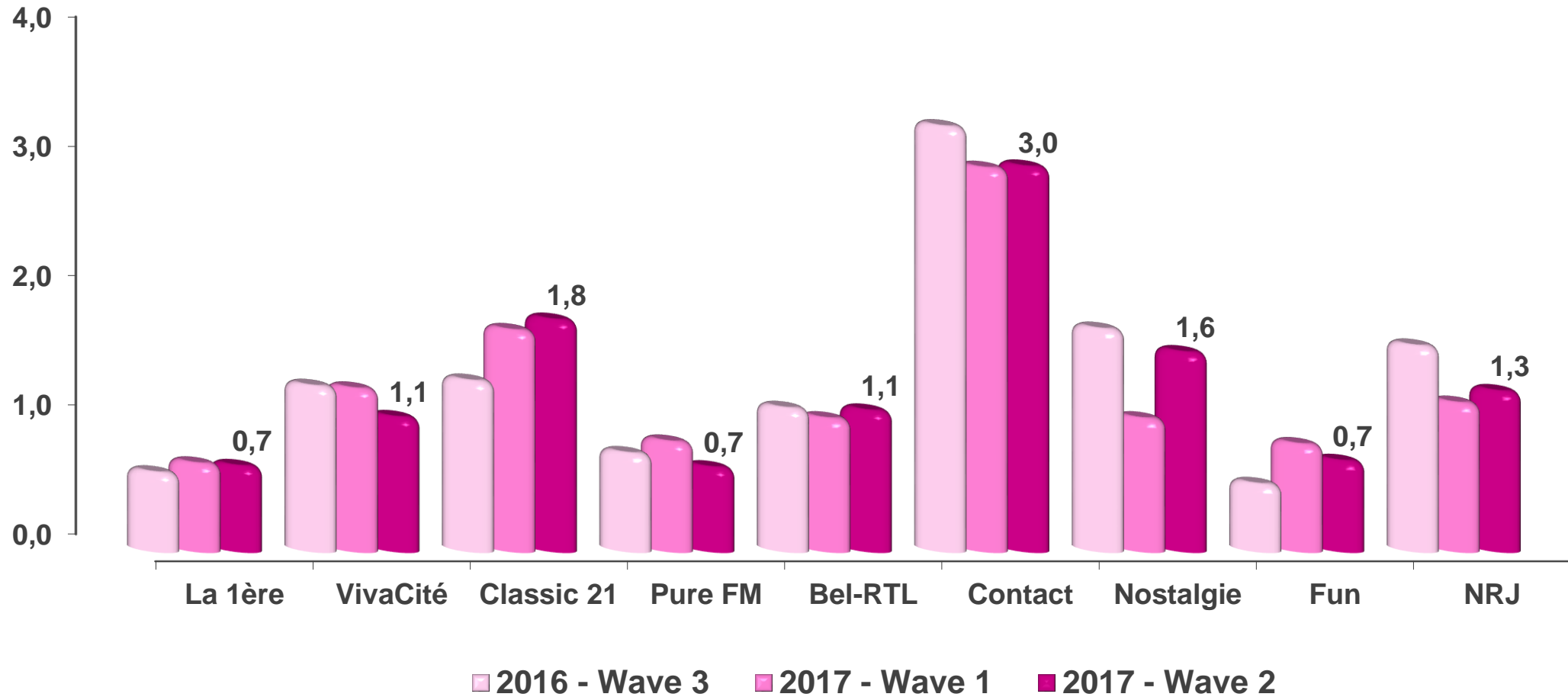
Source: CIM Radio (07:00-19:00/Average Break)

* : no agency commission



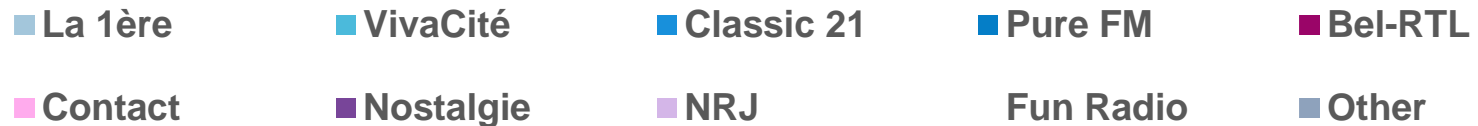
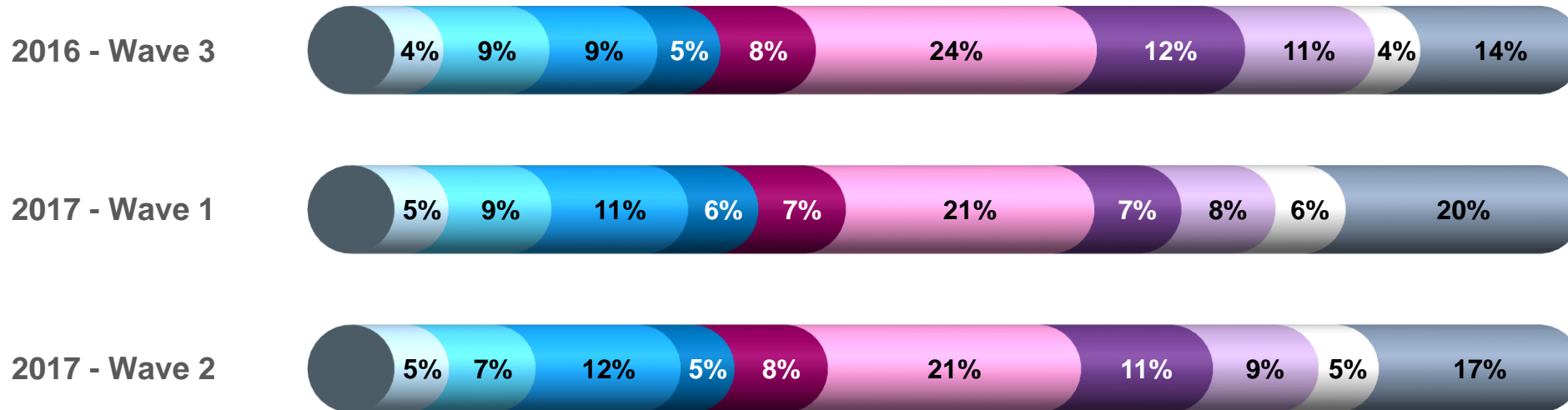
Key Radio Figures South - Average Rating (%) on ALL 18-44

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



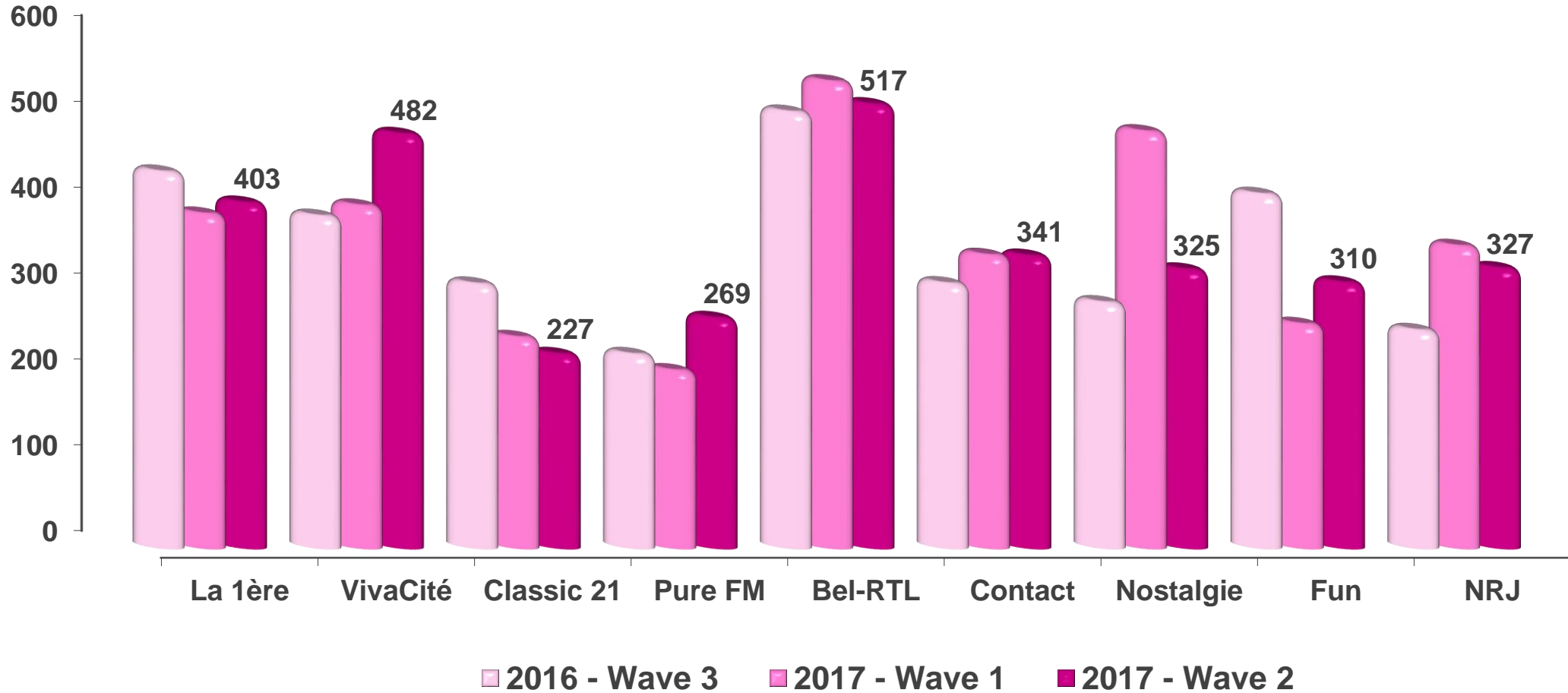
Key Radio Figures South - Audience Shares on ALL 18-44

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

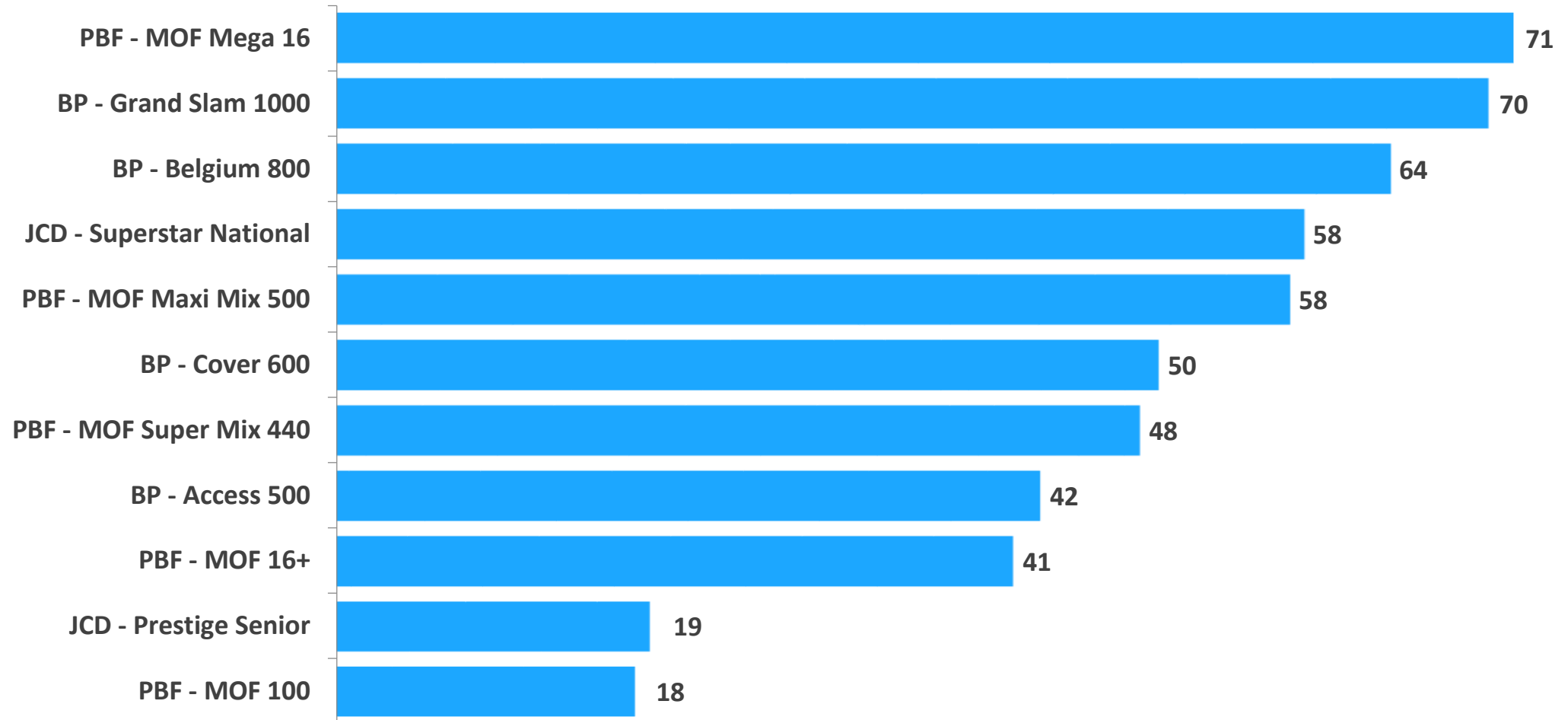


OOH ratings

Key OOH Figures - Panoramic & Classic billboards

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

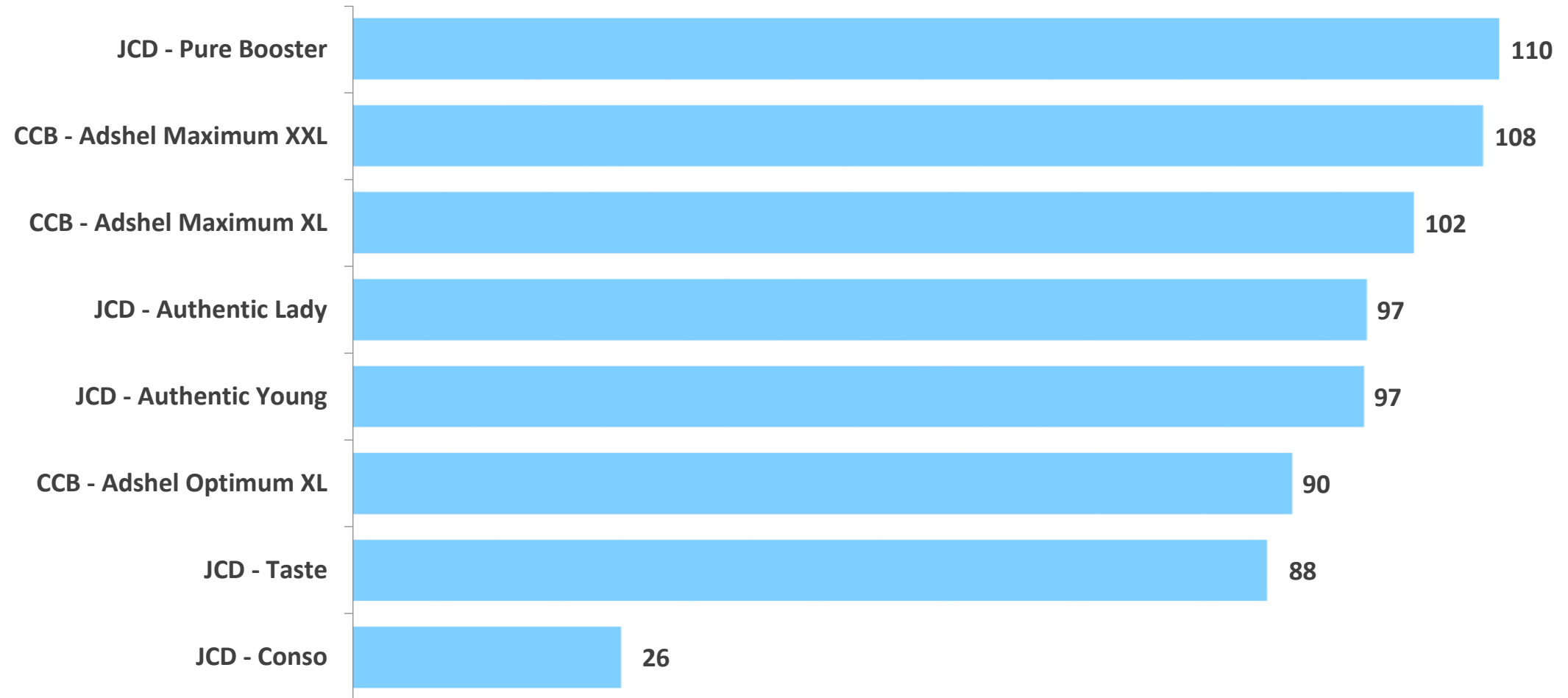
Source: CIM OOH 2017-01 / * : Visibility adjusted Rating Point



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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