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CONNECTIONS AGENCY



MARKET PERFORMANCES BAROMETER

Status January 2018

- 
- 🗨 **Gross media investments evolution p.4**
 - 🗨 **Key TV figures p.7**
 - 🗨 **Top websites p.14**
 - 🗨 **Key radio figures p.18**
 - 🗨 **Print circulation p.25**
 - 🗨 **OOH ratings p.29**



Gross Media Investments Evolution

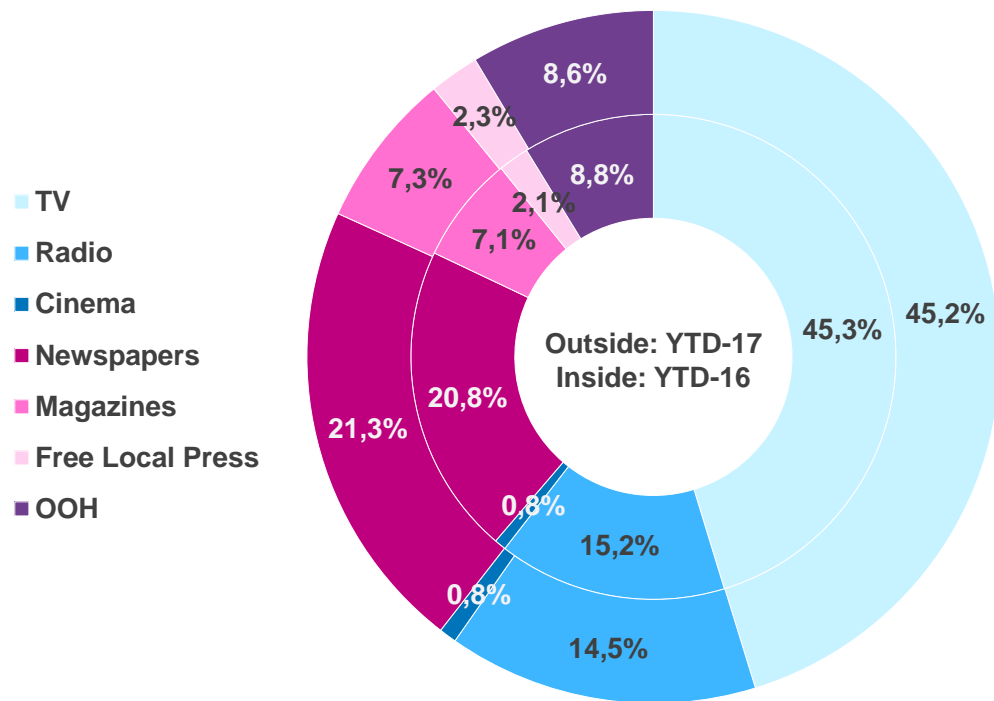
GROSS MEDIA INVESTMENTS EVOLUTION

Jan-Dec 2017

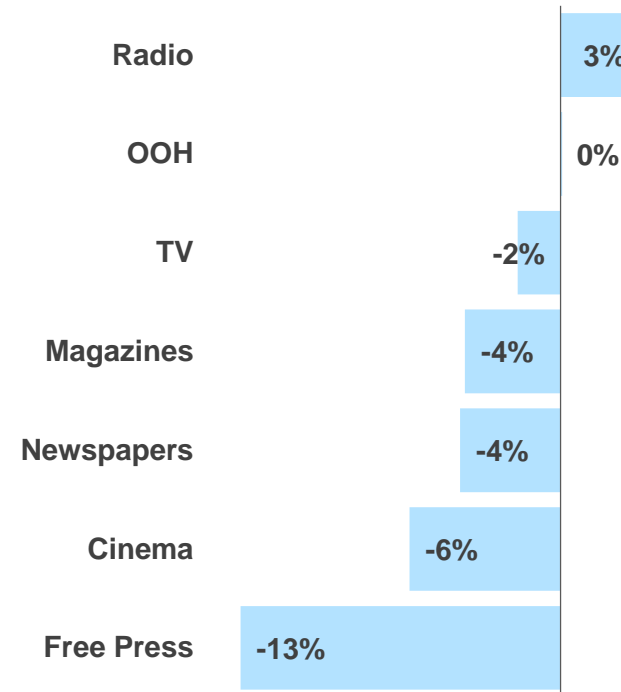
Source: MDB / Nielsen

Market	National	North	South
<ul style="list-style-type: none"> • € Mo • vs YTD-16 * • % Region 	<ul style="list-style-type: none"> • 3.789,1 • - 1,8% • 100% 	<ul style="list-style-type: none"> • 2.275,8 • - 4,1% • 60% 	<ul style="list-style-type: none"> • 1.513,3 • + 1,8% • 40%

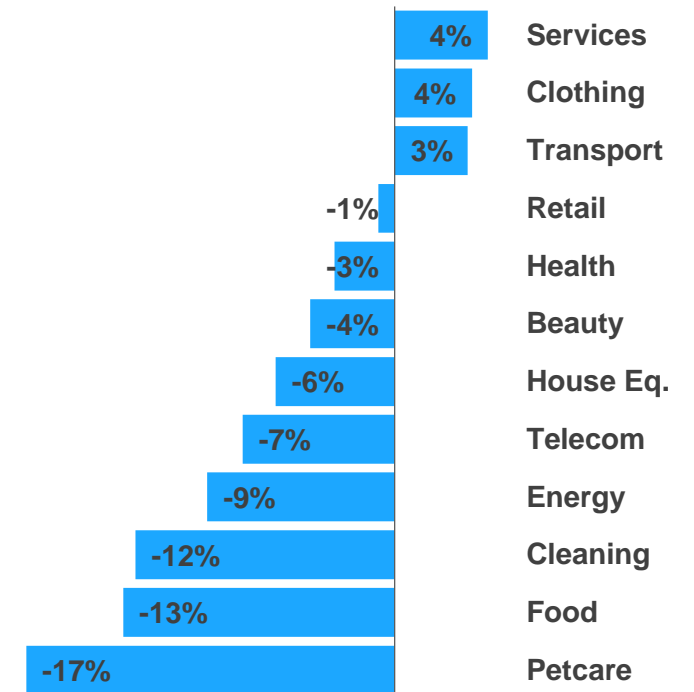
Media Mix Evol.



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-Dec 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	114,5	↓ 94	16	L'OREAL GROUP	28,0	↓ 80
2	D'IETEREN GROUP	81,4	↑ 108	17	LOTERIE NATIONALE	27,5	↑ 102
3	UNILEVER	59,7	↓ 82	18	AHOLD DELHAIZE	27,0	↓ 76
4	RECKITT & BENCKISER	57,4	↓ 78	19	BMW GROUP	26,5	↑ 109
5	COCA-COLA COMPANY	53,9	↓ 91	20	BEIERSDORF	26,2	↑ 107
6	PROXIMUS GROUP	53,7	↓ 79	21	BNP-PARIBAS	26,1	↑ 174
7	TELENET GROUP	45,7	↑ 102	22	DAIMLER BENZ GROUP	25,6	↑ 104
8	COLRUYT GROUP	44,6	↑ 106	23	NETHYS	24,6	↓ 93
9	ORANGE	41,6	↑ 109	24	LIDL & CO	23,9	↑ 105
10	RENAULT-NISSAN ALLIANCE	37,3	↓ 97	25	NESTLE GROUP	22,3	↓ 68
11	PSA PEUGEOT CITROEN	37,2	↓ 89	26	GLAXOSMITHKLINE	21,6	↑ 104
12	DANONE GROUP	31,4	↓ 71	27	METRO GROUPE	21,5	↑ 113
13	CARREFOUR GROUP	30,5	↓ 84	28	TRIVAGO	20,9	↑ 120
14	FIAT-CHRYSLER	28,5	↑ 146	29	THE WALT DISNEY COMPANY	20,1	↑ 134
15	MONDELEZ INTERNATIONAL	28,2	↓ 98	30	FERRERO	20,1	↓ 81

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



Key TV Figures

Key TV figures North - Jan-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	
		Jan-18	YTD	Jan-18	YTD	Jan-18	YTD
VTM	PRP 18-54	7,7		25,2		596	
Q2	PRP 18-44	2,2		8,1		560	
VITAYA	PRP 18-54	1,4		4,5		739	
VIER	PRP 18-54	2,2		7,2		811	
VIJF	PRP 18-54	1,6		5,4		492	
Total TV	PRP 18-54	30,7					
Total TV	PRP 18-44	27,1					

Key TV indexes North - Jan-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Jan-18 vs P-1	YTD	Jan-18 vs P-1	YTD	Jan-18 vs Channel's Objective	YTD
VTM	PRP 18-54	↓ 98		↓ 98		✓ 96	
Q2	PRP 18-44	↑ 105		↑ 104		✓ 97	
VITAYA	PRP 18-54	↓ 90		↓ 91		✗ 144	
VIER	PRP 18-54	↓ 86		↓ 86		✗ 125	
VIJF	PRP 18-54	↑ 114		↑ 115		✓ 92	
Total TV	PRP 18-54	↘ 99					
Total TV	PRP 18-44	→ 100					

Time Shift Viewing & Other TV Screen Usage Evolution

Market: NORTH - Period: January - Targetgroup: ALL 18-54

Source: CIM TV - Live +6 including guests (2014-2015) / Live +7 including guests (2016+)

Variable	Channel	Daypart	Jan-15	Jan-16	Jan-17	Jan-18	18 vs 17
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	33,4%	31,7%	32,4%	32,4%	100
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	87,9%	84,6%	86,2%	82,9%	96
	VHS + DVD player + Blue Ray	"	3,5%	5,1%	3,9%	3,9%	99
	Video on demand + Digital recorder	"	7,6%	8,4%	8,5%	11,7%	137
	Game console and other devices (3)	"	1,0%	1,8%	1,4%	1,5%	112
% Time shift viewing (4)	All Channels	"	11,1%	13,7%	23,2%	23,6%	102
	Main Channels (5)	"	12,9%	16,0%	25,0%	24,4%	98
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	90	90	88	87	
	Main channels (5) - TSV	"	24	28	31	37	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	150	133	124	118	95
	All TV channels (TSV)	"	15	18	32	32	99
	All TV channels (Live + TSV)	"	165	151	156	150	96
	Other TV Screen Usage	"	31	36	34	40	119
	Total TV Screen Usage	"	196	187	190	190	100

(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 - Jan-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>with</u> comm.) Total Day	
		Jan-18	YTD	Jan-18	YTD	Jan-18	YTD
RTL-TVI	PRP 18-54	8,4		26,8		581	
Club-RTL	MEN 18-54	1,5		6,0		619	
Plug-RTL	ALL 15-34	1,0		5,5		586	
La Une	PRP 18-54	3,9		12,4		637	
La Deux	PRP 18-54	1,7		5,3		586	
AB3	PRP 18-44	2,4		8,8		530	
TF1	PRP 18-54	4,3		13,6		455	
TTV	PRP 18-54	31,4					
TTV	PRP 18-44	27,5					
TTV	ALL 15-34	18,5					
TTV	MEN 18-54	24,2					

Key TV indexes South - Jan-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Jan-18 vs P-1	YTD	Jan-18 vs P-1	YTD	Jan-18 vs Channel's Objective	YTD
RTL-TVI	PRP 18-54	↓ 90		↓ 93		! 101	
Club-RTL	MEN 18-54	↑ 115		↑ 120		✗ 102	
Plug-RTL	ALL 15-34	↑ 113		↑ 125		✓ 99	
La Une	PRP 18-54	↓ 83		↓ 86		✗ 113	
La Deux	PRP 18-54	↑ 103		↑ 106		✗ 119	
AB3	PRP 18-44	↓ 96		↔ 101		✗ 102	
TF1	PRP 18-54	↓ 98		↔ 101		✓ 100	
TTV	PRP 18-54	↓ 97					
TTV	PRP 18-44	↓ 95					
TTV	ALL 15-34	↓ 91					
TTV	MEN 18-54	↓ 95					

Time Shift Viewing & Other TV Screen Usage Evolution

Market: SOUTH - Period: January - Targetgroup: ALL 18-54

Source: CIM TV - Live +6 including guests (2014-2015) / Live +7 including guests (2016+)

Variable	Channel	Daypart	2014	2015	2016	2017	17 vs 16
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	32,3%	32,8%	33,6%	32,8%	98
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	82,0%	80,9%	80,6%	78,0%	97
	VHS + DVD player + Blue Ray	"	5,8%	7,8%	7,0%	6,9%	98
	Video on demand + Digital recorder	"	9,9%	6,4%	11,5%	14,3%	124
	Game console and other devices (3)	"	2,3%	1,1%	0,8%	0,8%	94
% Time shift viewing (4)	All Channels	"	8,2%	9,1%	13,4%	18,8%	140
	Main Channels (5)	"	8,8%	10,3%	14,5%	20,3%	140
Commercial breaks rating vs full daypart rating	Main channels (5) - Live	"	88	89	89	88	
	Main channels (5) - TSV	"	42	45	52	51	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	160	160	157	140	89
	All TV channels (TSV)	"	12	13	21	27	132
	All TV channels (Live + TSV)	"	172	174	178	167	94
	Other TV Screen Usage	"	46	49	51	55	107
	Total TV Screen Usage	"	218	223	229	222	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 - Jan-18

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

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.179.937	11	Sporza	234.265
2	Nieuwsblad	1.071.129	12	Het Belang van Limburg	228.404
3	2dehands.be-2ememain.be	584.660	13	Le Soir	223.285
4	De Standaard	375.168	14	Knack-LeVif	210.568
5	VRT	324.680	15	Immoweb	192.648
6	Gazet van Antwerpen	313.340	16	De Morgen	162.987
7	Sudinfo	312.578	17	VTM	161.558
8	RTBF.be	258.118	18	7sur7.be	142.940
9	DH.be	248.312	19	La Libre.be	140.426
10	RTL.be	247.334	20	L'Avenir.net	134.032

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

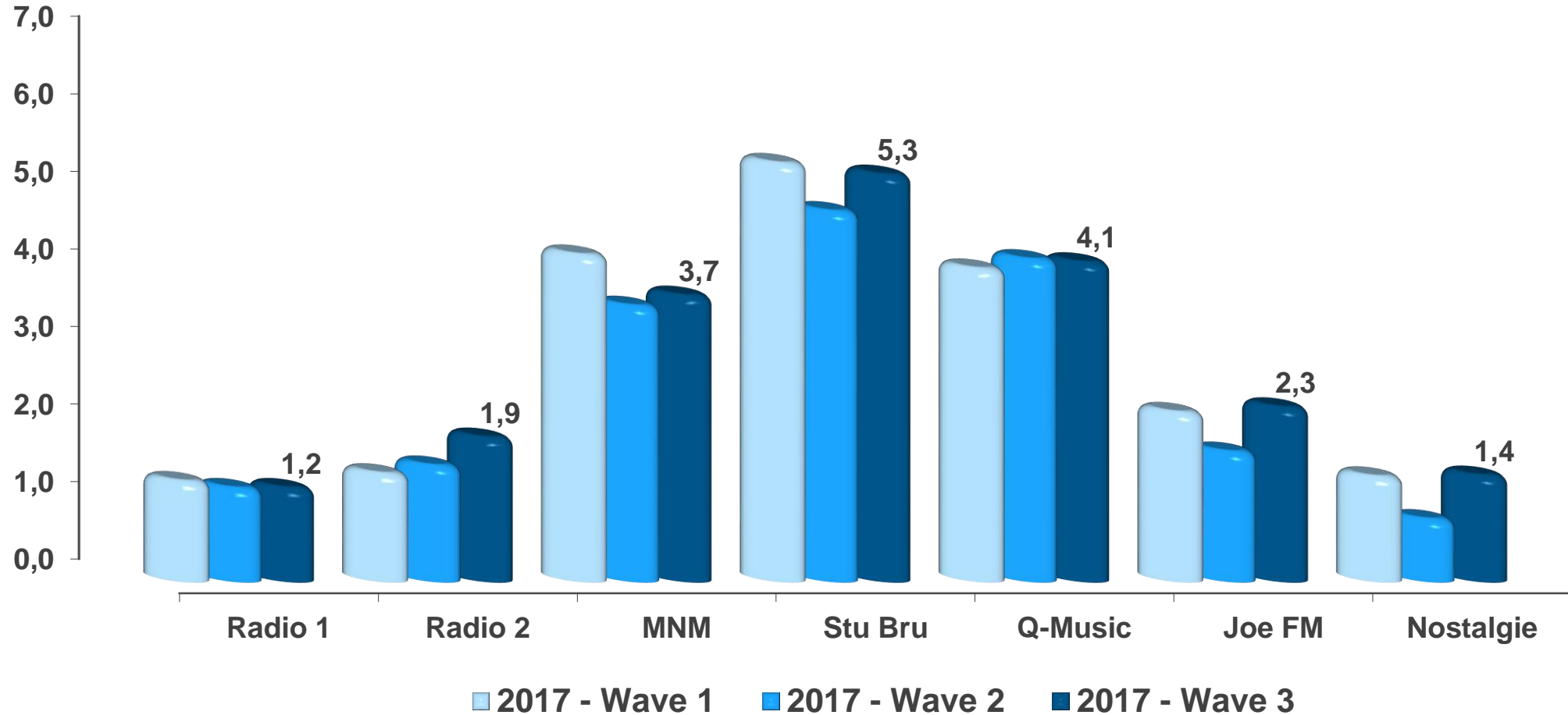
NB: Comscore stopped measuring the Belgian market on December 31, 2017



Key Radio Figures

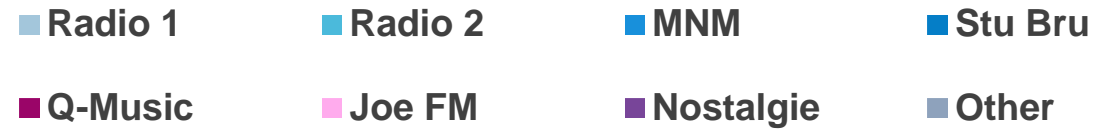
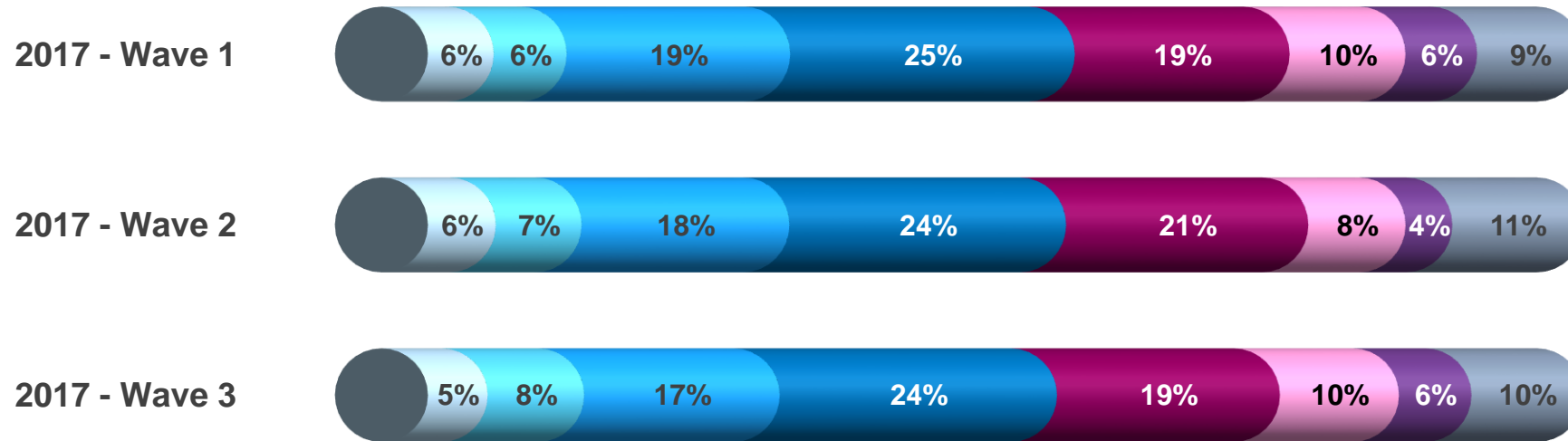
Key Radio Figures North - Average Rating (%) on ALL 18-44

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



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

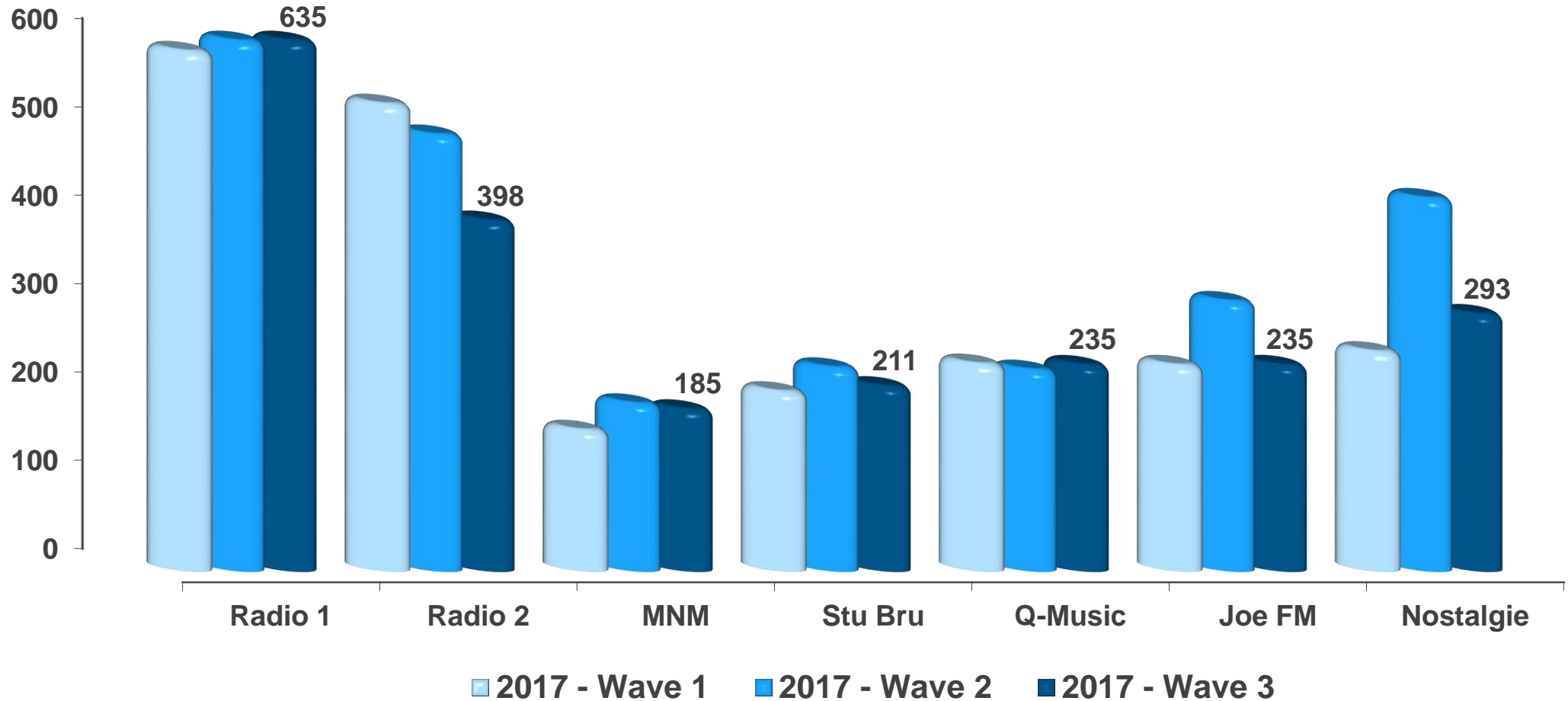
Source: CIM Radio (07:00-19:00)



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

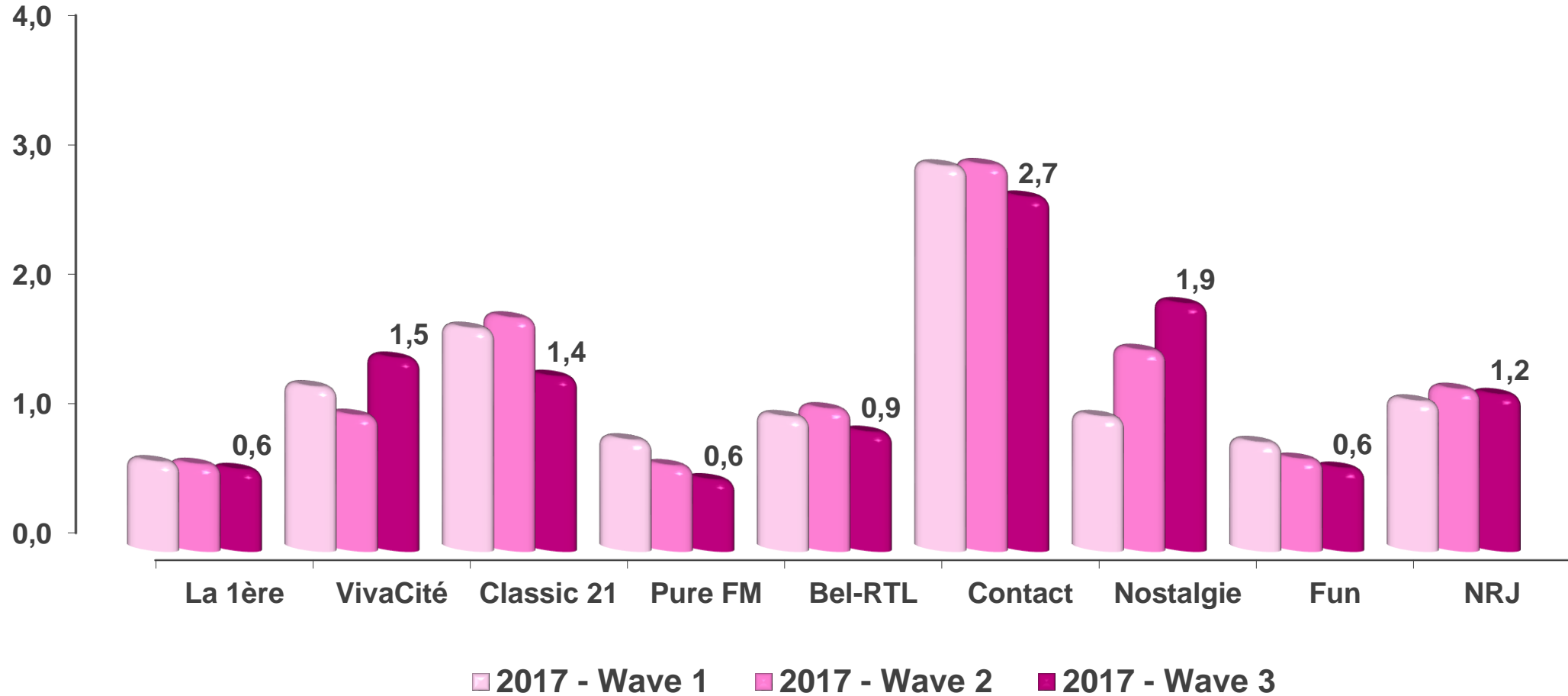
Source: CIM Radio (07:00-19:00/Average Break)

* : no agency commission



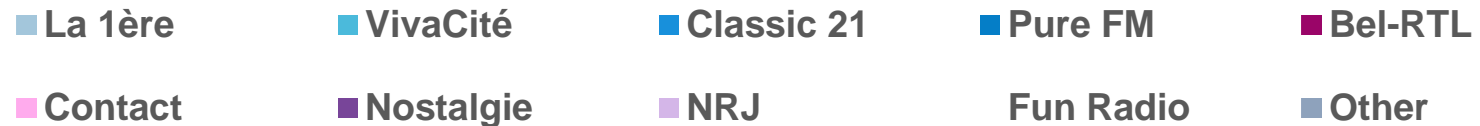
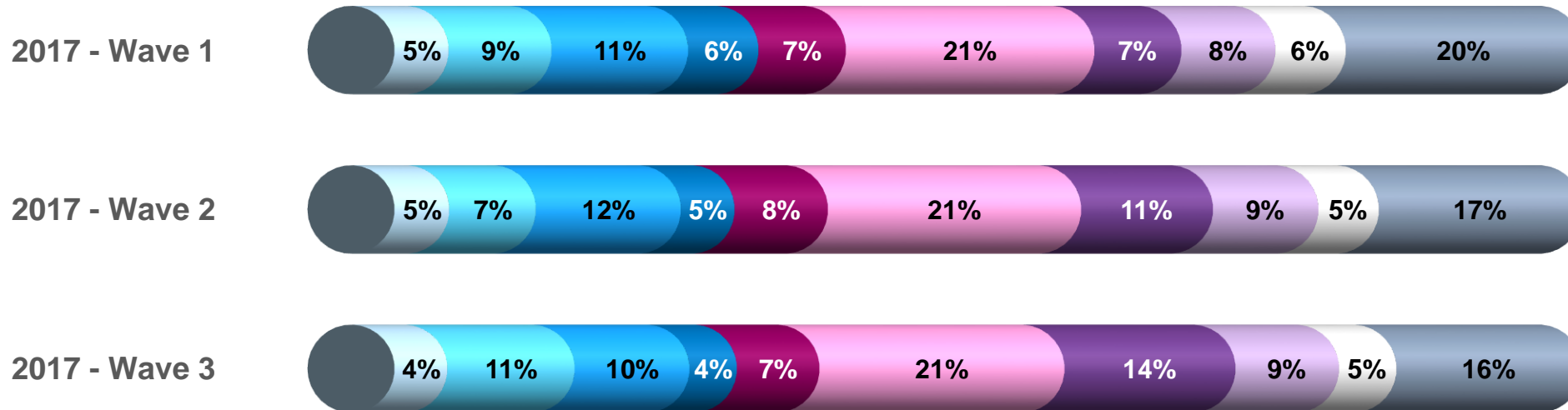
Key Radio Figures South - Average Rating (%) on ALL 18-44

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



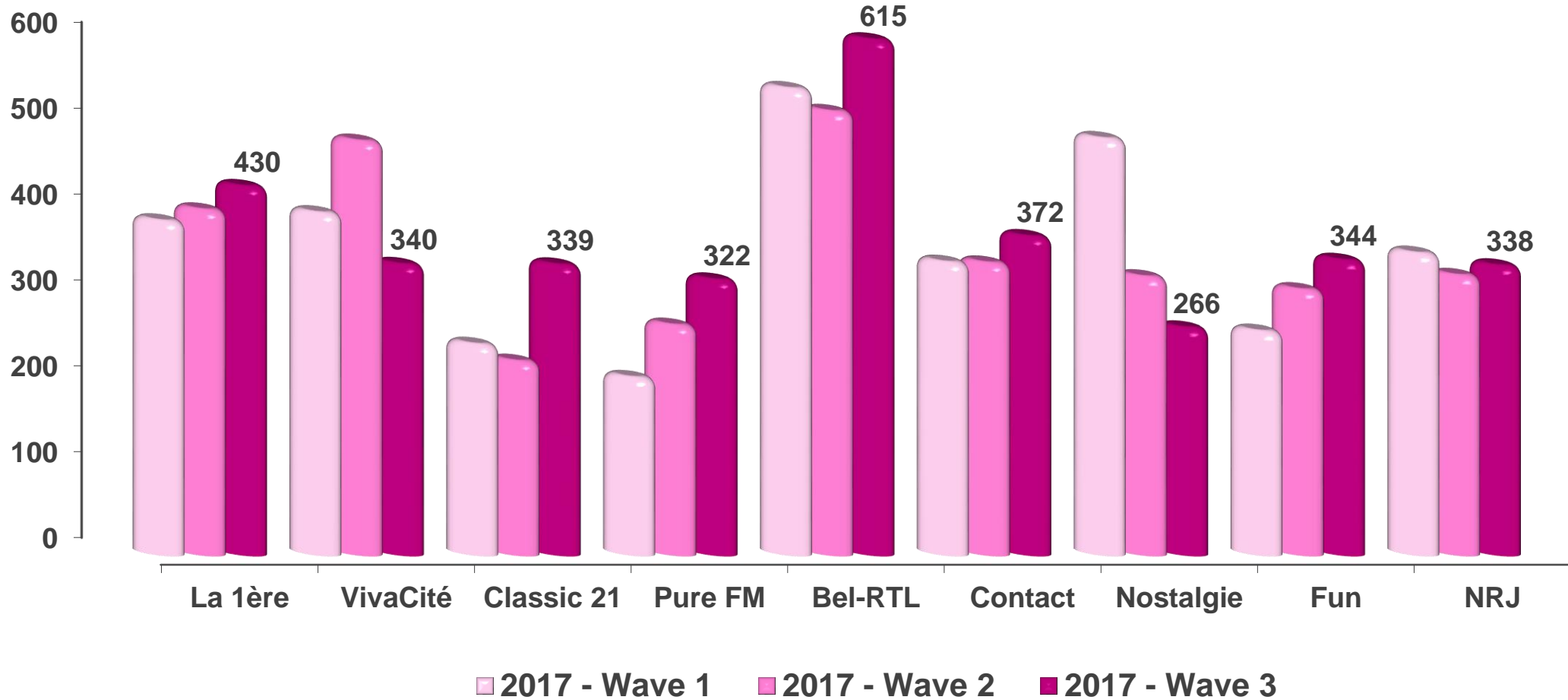
Key Radio Figures South - Audience Shares on ALL 18-44

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

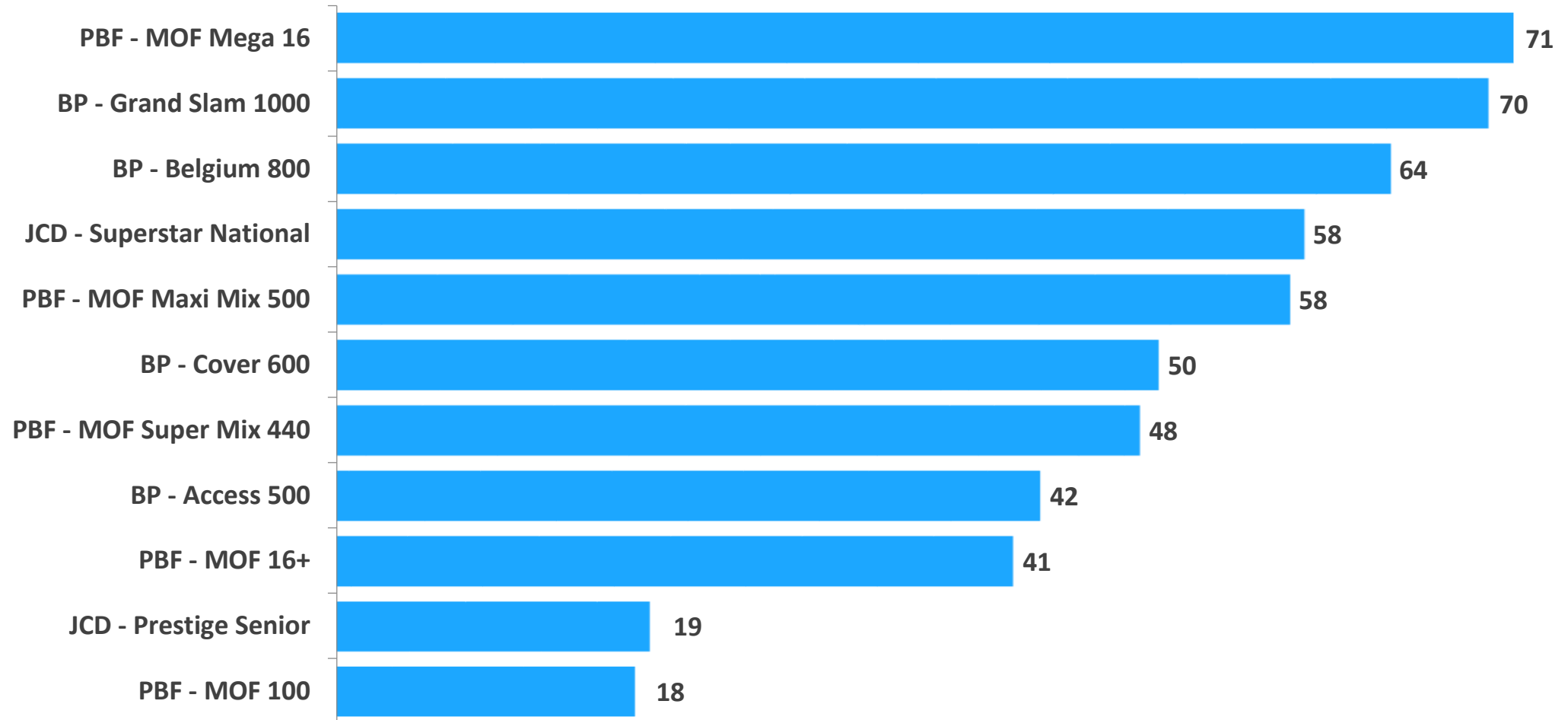


OOH ratings

Key OOH Figures - Panoramic & Classic billboards

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

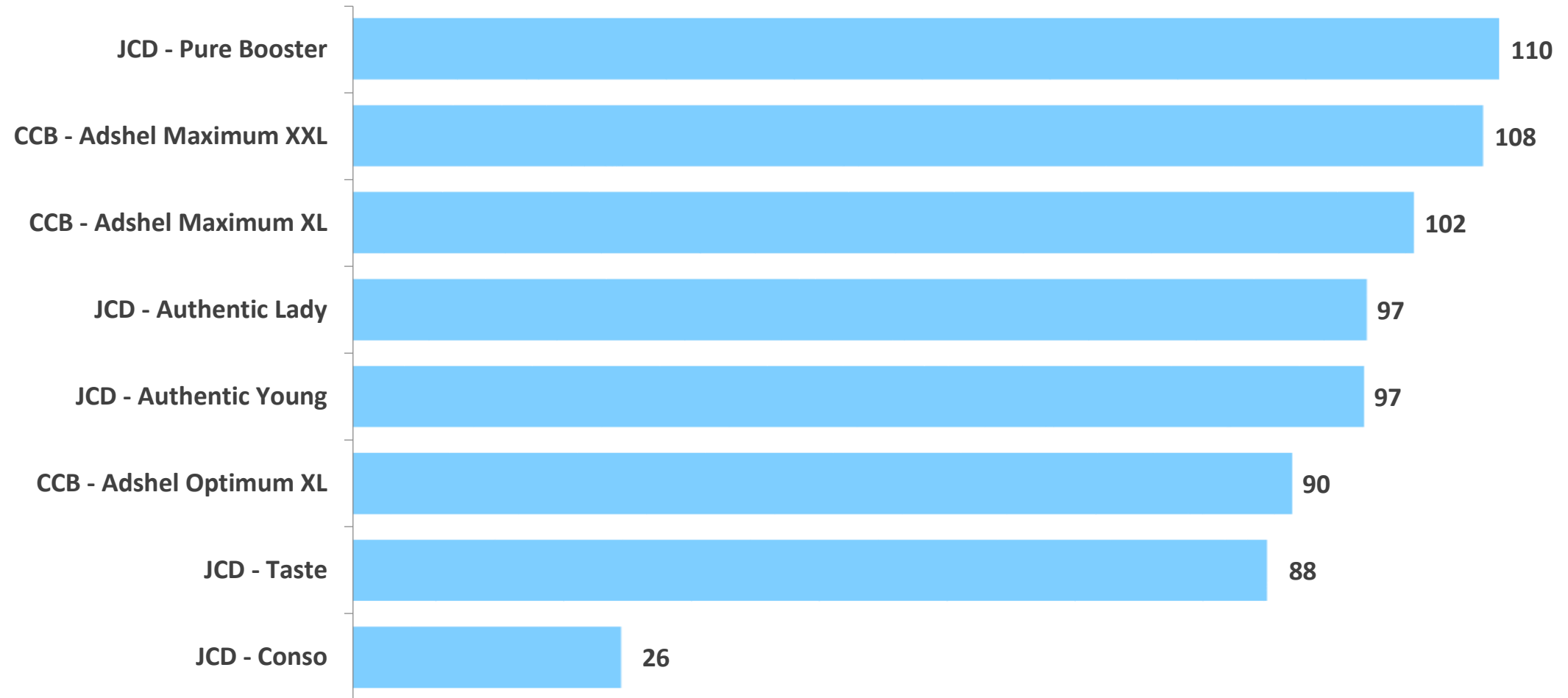
Source: CIM OOH 2017-01 / * : Visibility adjusted Rating Point



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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