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CONNECTIONS AGENCY



MARKET PERFORMANCES BAROMETER

Status February 2018

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Gross Media Investments Evolution

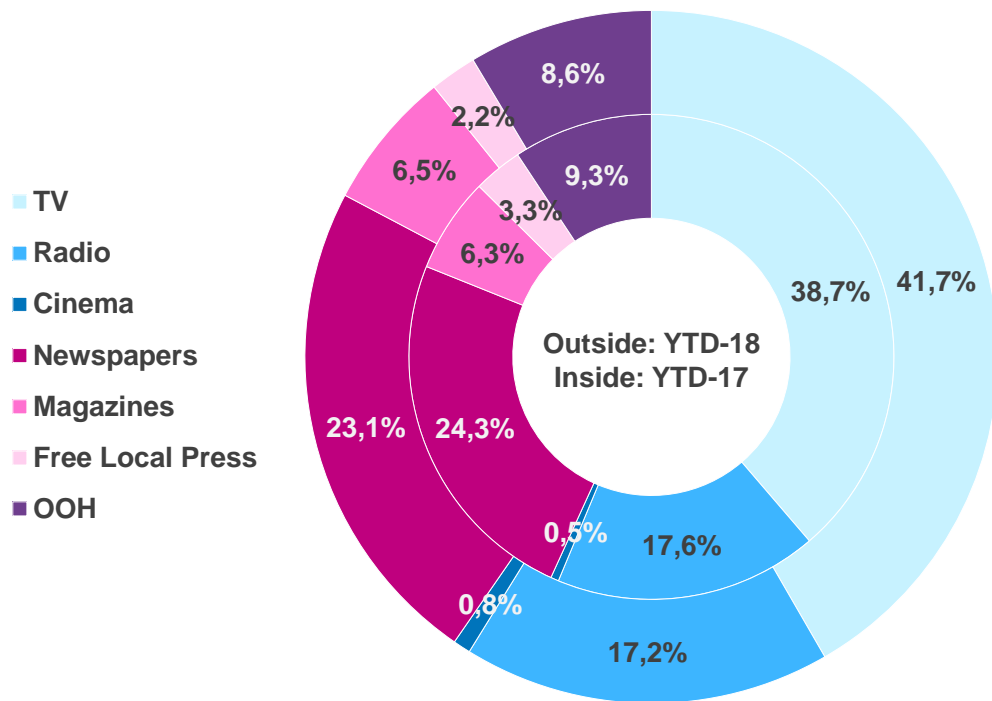
GROSS MEDIA INVESTMENTS EVOLUTION

January 2018

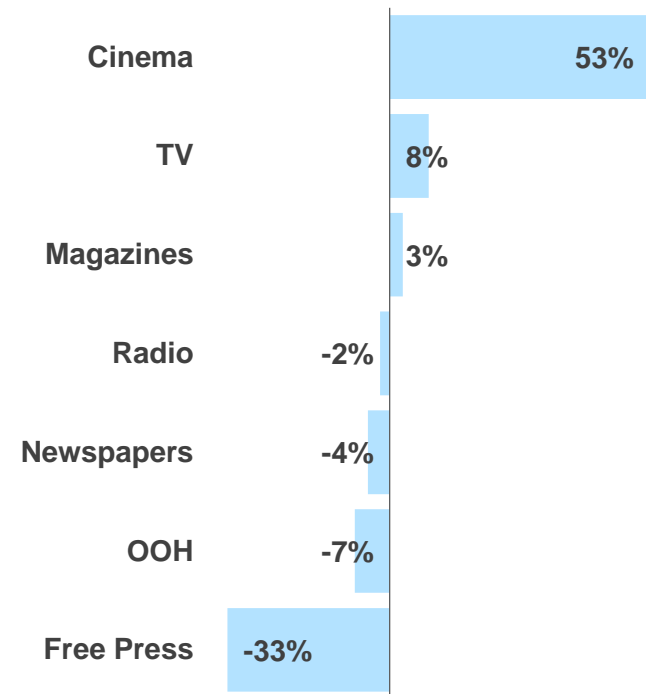
Source: MDB / Nielsen

Market	National	North	South
<ul style="list-style-type: none"> • € Mo • vs YTD-16 * • % Region 	<ul style="list-style-type: none"> • 252,9 • - 0,4% • 100% 	<ul style="list-style-type: none"> • 147,2 • + 2,3% • 58% 	<ul style="list-style-type: none"> • 105,7 • - 2,2% • 42%

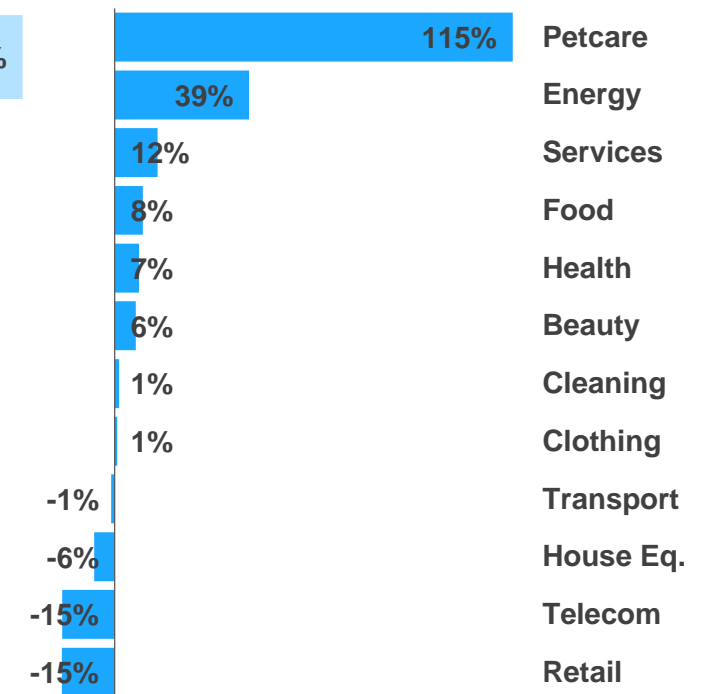
Media Mix Evol.



Media Evol. (vs YTD-16)



Ecogroups Evol. (vs YTD-16)



NB : Internet 2018 (declarative) figures are not published yet => internet is not included here !
 Clear Channel 2018 Adshel figures are not published either (not included here).

MDB TOP 30 ADVERTISERS - January 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	D'IETEREN GROUP	14,6	↑ 103	16	BASIC-FIT	2,0	↑ 133
2	PROCTER & GAMBLE	7,6	↑ 106	17	ALCOPA (Hyundai, ...)	1,9	↓ 84
3	PSA PEUGEOT CITROEN	6,7	↓ 93	18	FEBIAC	1,8	↑ 102
4	RENAULT-NISSAN ALLIANCE	5,9	↑ 115	19	UNILEVER	1,7	↑ 160
5	RECKITT & BENCKISER	3,8	↓ 67	20	THE WALT DISNEY COMPANY	1,7	↑ 162
6	FIAT CHRYSLER AUTOMOBILES	3,8	↑ 173	21	TRIVAGO	1,7	↓ 96
7	PROXIMUS GROUP	3,5	↑ 137	22	GLAXOSMITHKLINE	1,7	↑ 131
8	JAGUAR LAND ROVER BELUX	3,2	↑ 219	23	L'OREAL GROUP	1,6	↑ 137
9	FORD MOTOR COMPANY	2,8	↓ 87	24	COLRUYT GROUP	1,6	↓ 63
10	GENERAL MOTORS CORP.	2,5	→ 100	25	METRO GROUP (Media Markt)	1,6	↑ 132
11	TELENET GROUP	2,5	↓ 68	26	TUI BELGIUM	1,6	↑ 108
12	COCA-COLA COMPANY	2,3	↑ 256	27	BMW GROUP	1,5	↓ 62
13	ING GROUP	2,1	↑ 107	28	BPOST BANQUE	1,5	↑ 282
14	AXA GROUP	2,1	↑ 755	29	BELFIUS	1,5	↑ 241
15	AHOLD DELHAIZE	2,0	↑ 147	30	MONDELEZ INTERNATIONAL	1,4	↓ 81

**NB : Internet 2018 (declarative) figures are not published yet => internet is not included here !
Clear Channel 2018 Adshel figures are not published either (not included here).**



Key TV Figures

Key TV figures North - Feb-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	
		Feb-18	YTD	Feb-18	YTD	Feb-18	YTD
VTM	PRP 18-54	7,8	7,8	25,2	25,2	631	612
Q2	PRP 18-44	2,1	2,1	7,6	7,9	613	583
VITAYA	PRP 18-54	1,3	1,3	4,2	4,3	793	763
VIER	PRP 18-54	3,3	2,7	10,6	8,8	810	810
VIJF	PRP 18-54	2,2	1,9	7,1	6,2	536	514
Total TV	PRP 18-54	31,0	30,8				
Total TV	PRP 18-44	27,4	27,2				

Key TV indexes North - Feb-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Feb-18 vs P-1	YTD	Feb-18 vs P-1	YTD	Feb-18 vs Channel's Objective	YTD
VTM	PRP 18-54	↑ 103	→ 100	↔ 101	→ 100	✗ 102	✓ 99
Q2	PRP 18-44	↓ 97	↔ 101	↓ 95	→ 100	✗ 106	! 101
VITAYA	PRP 18-54	↓ 97	↓ 93	↓ 96	↓ 93	✗ 155	✗ 149
VIER	PRP 18-54	↓ 92	↓ 89	↓ 91	↓ 89	✗ 110	✗ 117
VIJF	PRP 18-54	↑ 116	↑ 115	↑ 114	↑ 115	✓ 88	✓ 90
Total TV	PRP 18-54	↔ 101	→ 100				
Total TV	PRP 18-44	↑ 102	↔ 101				

Time Shift Viewing & Other TV Screen Usage Evolution

Market: NORTH - Period: Jan-Feb - Targetgroup: ALL 18-54

Source: CIM TV - Live +6 including guests (2014-2015) / 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	32,8%	31,5%	32,3%	32,2%	100
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	87,9%	84,9%	86,6%	83,9%	97
	VHS + DVD player + Blue Ray	"	3,6%	4,8%	4,0%	3,6%	91
	Video on demand + Digital recorder	"	7,4%	8,4%	8,3%	11,0%	134
	Game console and other devices (3)	"	1,2%	1,9%	1,2%	1,4%	117
% Time shift viewing (4)	All Channels	"	11,5%	15,1%	24,4%	25,0%	102
	Main Channels (5)	"	13,6%	18,4%	27,0%	27,2%	101
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	89	89	86	87	
	Main channels (5) - TSV	"	25	26	29	34	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	146	129	122	117	97
	All TV channels (TSV)	"	15	20	33	33	99
	All TV channels (Live + TSV)	"	161	149	155	151	97
	Other TV Screen Usage	"	30	35	32	38	118
	Total TV Screen Usage	"	191	183	187	188	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 - Feb-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	
		Feb-18	YTD	Feb-18	YTD	Feb-18	YTD
RTL-TVI	PRP 18-54	8,6	8,5	28,2	27,5	666	621
Club-RTL	MEN 18-54	1,8	1,6	7,7	6,8	713	668
Plug-RTL	ALL 15-34	0,8	0,9	4,1	4,9	973	737
La Une	PRP 18-54	3,7	3,8	12,0	12,2	734	682
La Deux	PRP 18-54	1,5	1,6	4,8	5,1	671	623
AB3	PRP 18-44	2,7	2,5	10,1	9,4	433	478
TF1	PRP 18-54	4,5	4,4	14,5	14,1	456	456
TTV	PRP 18-54	30,6	31,0				
TTV	PRP 18-44	26,5	27,0				
TTV	ALL 15-34	18,5	18,5				
TTV	MEN 18-54	23,6	23,9				

Key TV indexes South - Feb-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Feb-18 vs P-1	YTD	Feb-18 vs P-1	YTD	Feb-18 vs Channel's Objective	YTD
RTL-TVI	PRP 18-54	↓ 98	↓ 94	↑ 102	↓ 97	✓ 99	✓ 100
Club-RTL	MEN 18-54	↑ 119	↑ 116	↑ 122	↑ 121	✓ 97	✓ 100
Plug-RTL	ALL 15-34	↓ 80	↓ 98	↓ 80	↑ 103	✗ 142	✗ 116
La Une	PRP 18-54	↓ 85	↓ 84	↓ 89	↓ 87	✗ 118	✗ 116
La Deux	PRP 18-54	↔ 99	↔ 101	↑ 104	↑ 105	✗ 125	✗ 121
AB3	PRP 18-44	↓ 92	↓ 94	↓ 97	↔ 99	✓ 76	✓ 88
TF1	PRP 18-54	↓ 96	↓ 97	↔ 100	↔ 101	-	-
TTV	PRP 18-54	↓ 96	↓ 96				
TTV	PRP 18-44	↓ 95	↓ 95				
TTV	ALL 15-34	↔ 101	↓ 95				
TTV	MEN 18-54	↓ 98	↓ 96				

Time Shift Viewing & Other TV Screen Usage Evolution

Market: SOUTH - Period: Jan-Feb - Targetgroup: ALL 18-54

Source: CIM TV - Live +6 including guests (2014-2015) / 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	36,2%	36,2%	36,4%	35,7%	98
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	82,0%	81,5%	79,0%	76,1%	96
	VHS + DVD player + Blue Ray	"	6,8%	7,5%	7,3%	6,8%	93
	Video on demand + Digital recorder	"	9,7%	10,5%	13,1%	16,4%	125
	Game console and other devices (3)	"	1,5%	0,6%	0,7%	0,8%	121
% Time shift viewing (4)	All Channels	"	7,4%	13,0%	16,9%	20,5%	122
	Main Channels (5)	"	8,2%	14,2%	18,7%	22,2%	118
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	90	92	91	88	
	Main channels (5) - TSV	"	42	51	50	50	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	179	169	160	146	91
	All TV channels (TSV)	"	12	21	28	30	108
	All TV channels (Live + TSV)	"	191	190	187	176	94
	Other TV Screen Usage	"	51	53	58	63	108
	Total TV Screen Usage	"	242	243	246	239	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 - Feb-18

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

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.129.934	11	RTL.be	251.191
2	Nieuwsblad	1.055.706	12	Immoweb	237.910
3	2dehands.be-2ememain.be	585.625	13	Le Soir	225.508
4	VRT	364.684	14	Het Belang van Limburg	215.948
5	De Standaard	352.642	15	Knack-LeVif	212.082
6	Gazet van Antwerpen	299.725	16	VTM	167.623
7	SudInfo	286.032	17	De Morgen	161.213
8	Sporza	273.874	18	7sur7.be	150.414
9	RTBF.be	270.227	19	La Libre.be	149.899
10	DH.be	266.225	20	L'Avenir.net	133.438

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

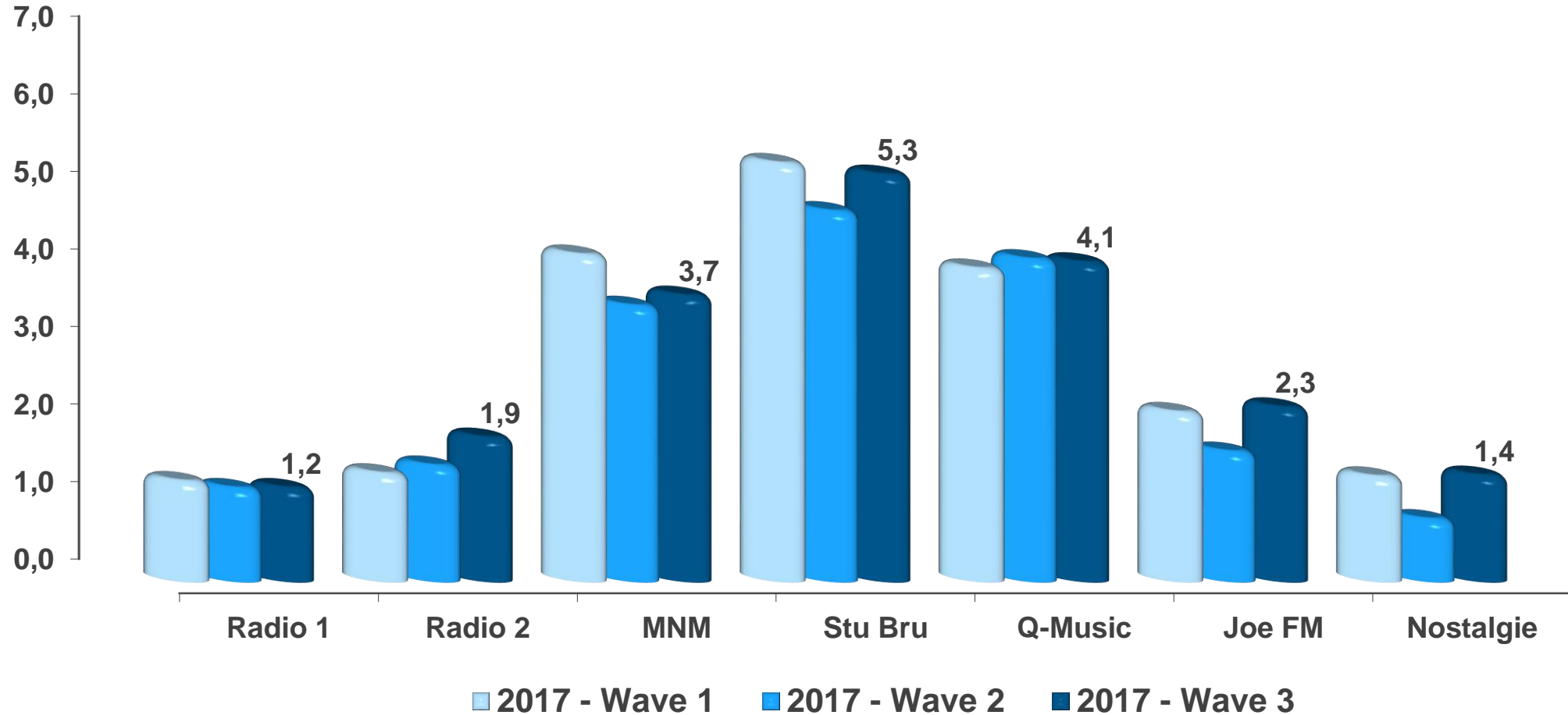
NB: Comscore stopped measuring the Belgian market on December 31, 2017



Key Radio Figures

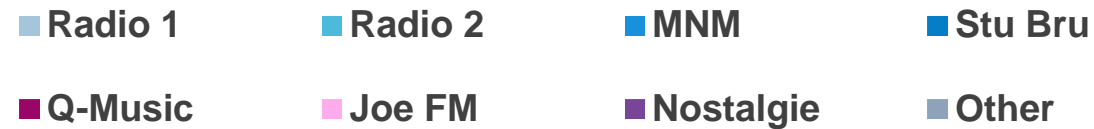
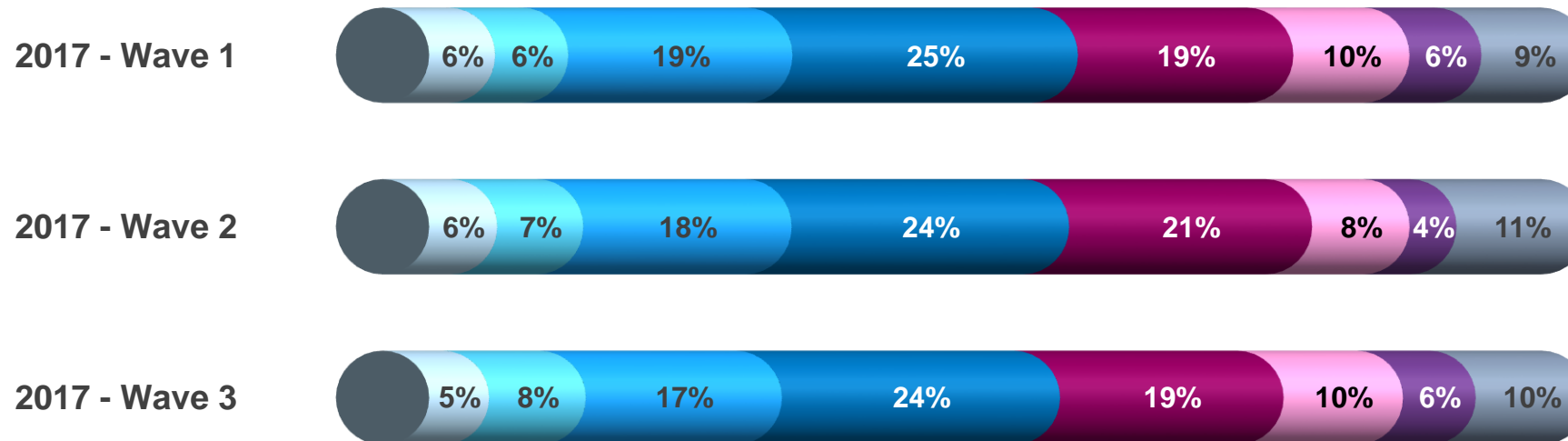
Key Radio Figures North - Average Rating (%) on ALL 18-44

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



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

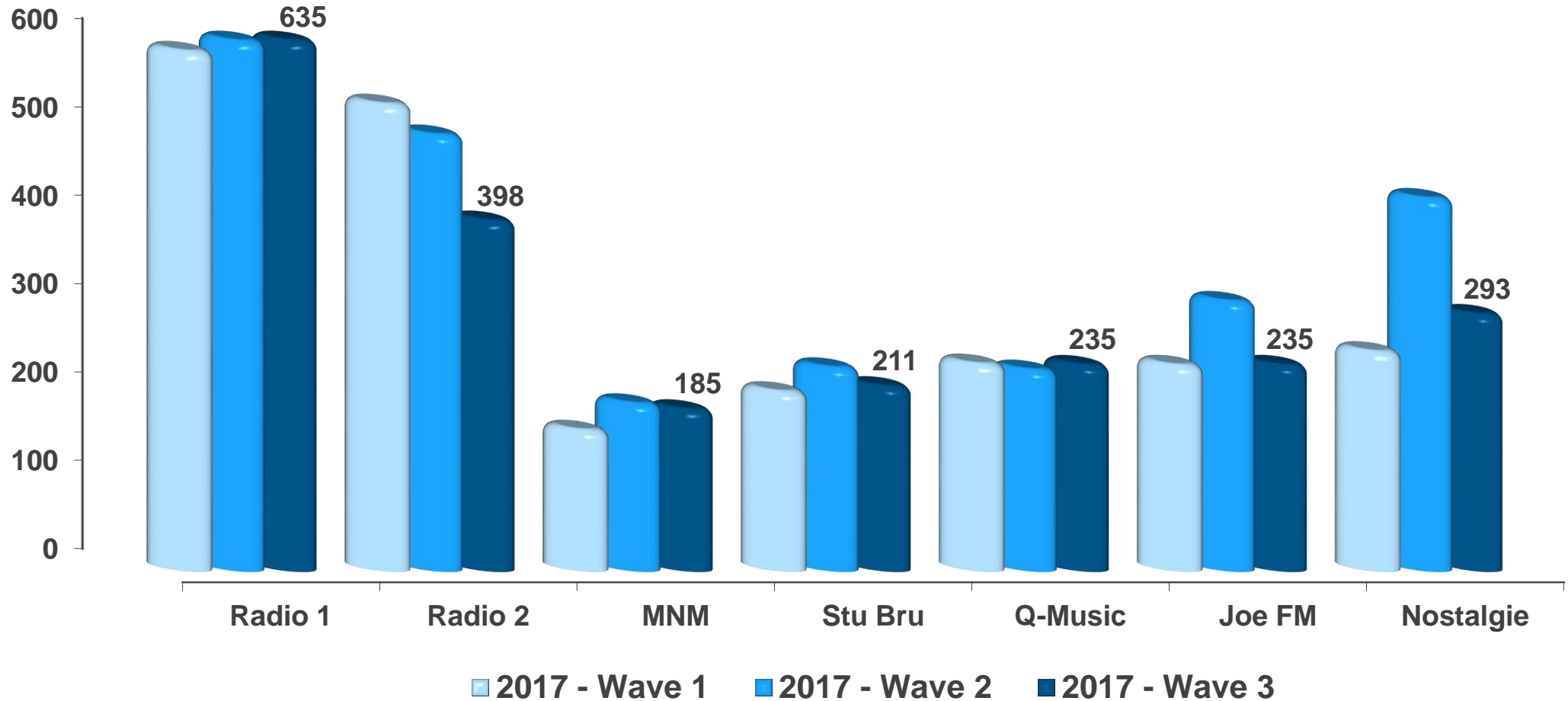
Source: CIM Radio (07:00-19:00)



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

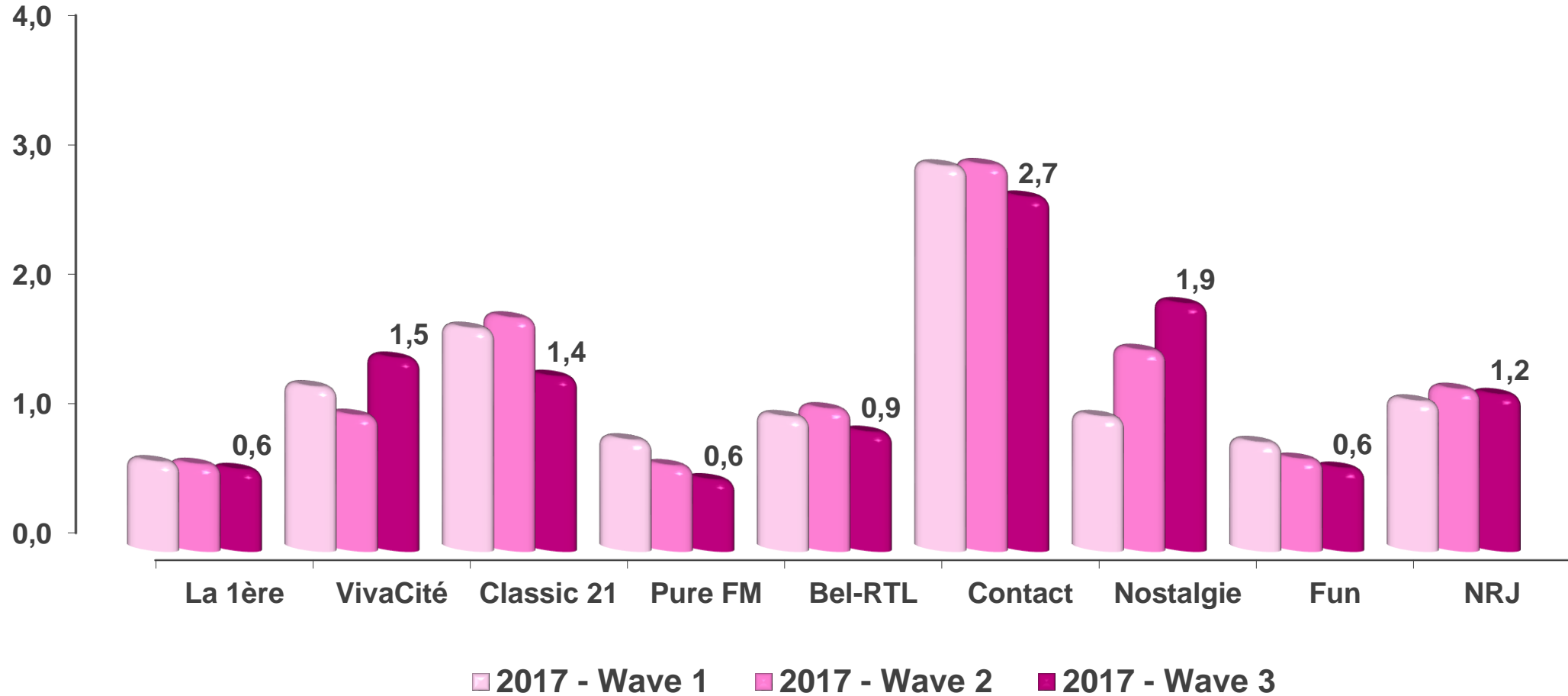
Source: CIM Radio (07:00-19:00/Average Break)

* : no agency commission



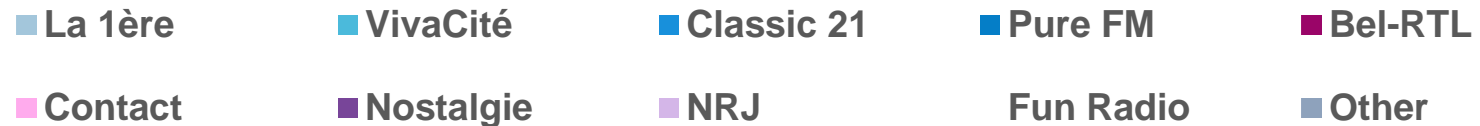
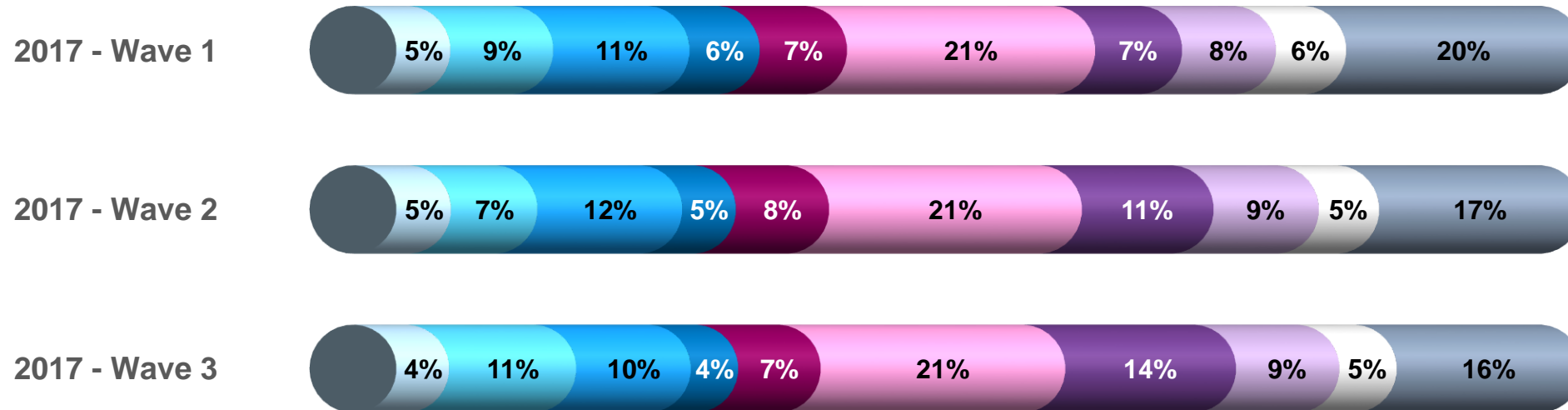
Key Radio Figures South - Average Rating (%) on ALL 18-44

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



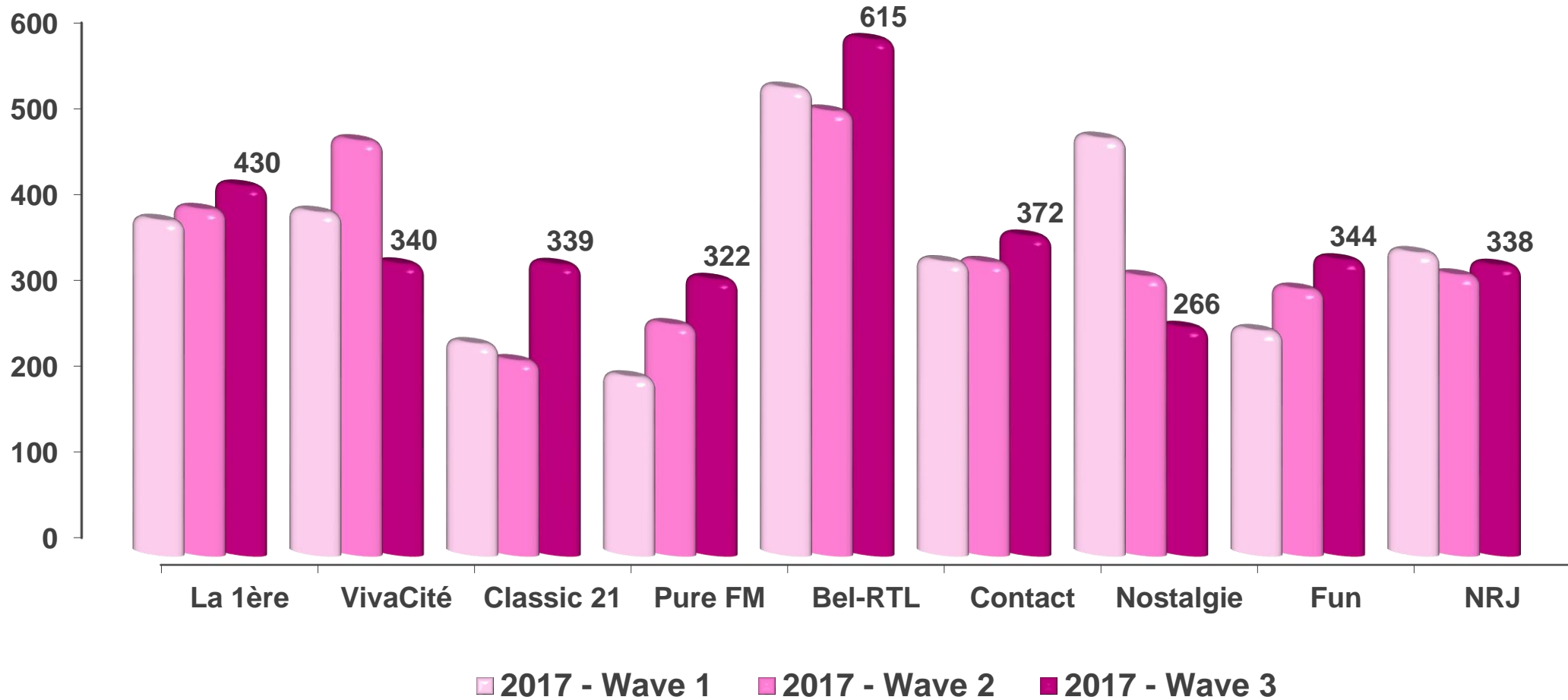
Key Radio Figures South - Audience Shares on ALL 18-44

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/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	260.735	↓ 95	5,6%
Het Nieuwsblad	228.786	↓ 95	5,2%
De Standaard	101.470	→ 100	20,1%
Het Belang van Limburg	91.486	↓ 97	6,5%
Gazet van Antwerpen	84.859	↓ 96	6,1%
De Morgen	52.857	↓ 95	31,2%
De Tijd	42.347	↑ 104	38,7%
Total North	862.540	↓ 96	10,5%

SOUTH	Circulation	vs 2016	% Digital
Sud Presse	81.047	↓ 90	7,5%
L'Avenir	80.265	↓ 97	7,6%
Le Soir	65.006	↓ 95	19,2%
La DH	37.894	↓ 91	7,5%
La Libre Belgique	35.015	↓ 98	15,6%
L'Echo	16.227	↓ 91	41,9%
Grenz Echo	10.194	→ 100	4,6%
Total South	325.648	↓ 94	12,3%

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	718.769	↓ 99	419.343	↓ 93		
Women	353.854	↓ 90	189.245	↓ 93		
Business & News	118.395	↓ 97	144.535	↓ 97	54.743	↑ 112
Generation (Youth/Senior)			16.649	↓ 95	115.606	↑ 106
Men	28.523	↓ 99	17.984	↓ 98	47.440	↑ 102
Lifestyle & Travel					81.164	↓ 97
Build & Deco	13.987	↓ 94	14.086	↓ 87	17.607	↓ 88
TOTAL	1.233.528	↓ 96	801.842	↓ 94	316.560	↑ 103

Figures : 2016 = Cim Authenticated / 2017 = declarations on honour by publishers

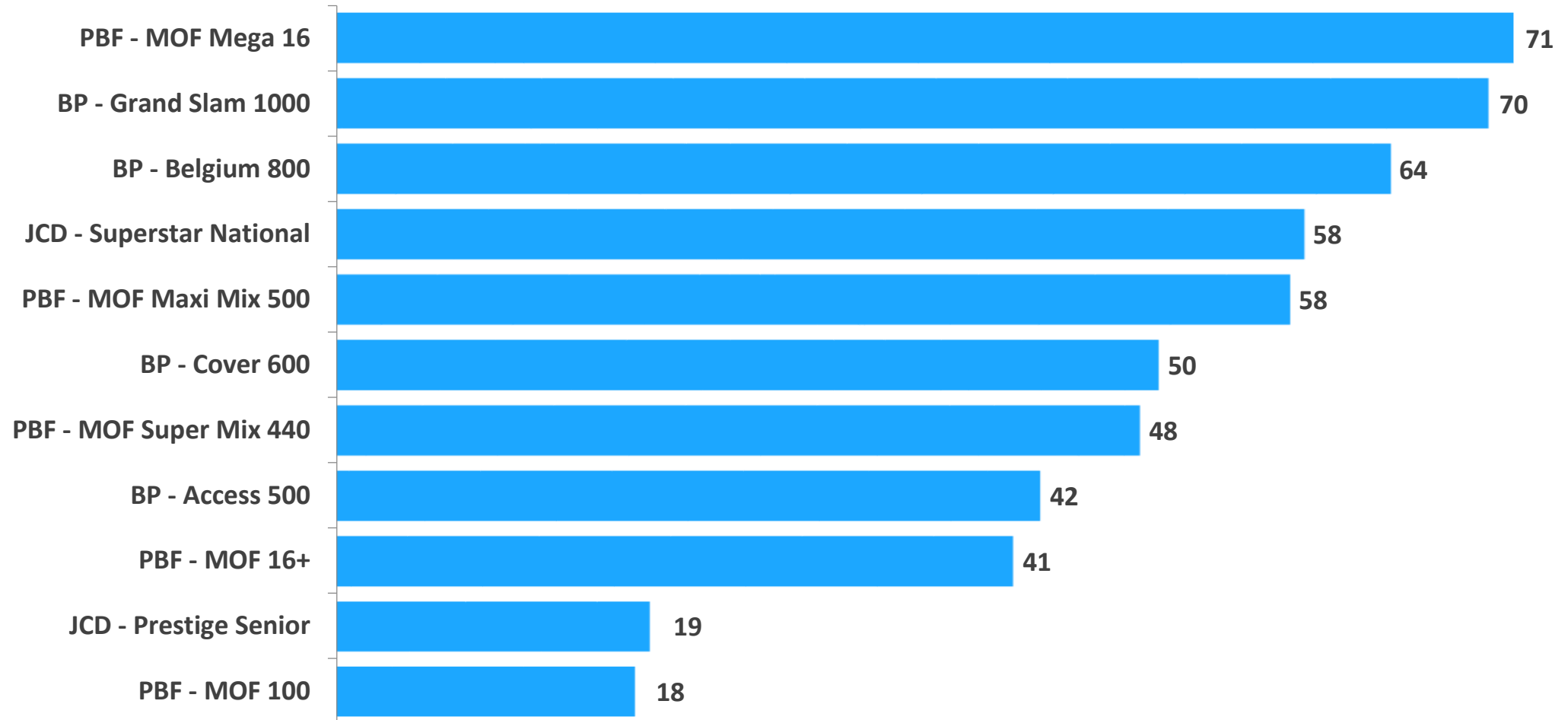


OOH ratings

Key OOH Figures - Panoramic & Classic billboards

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

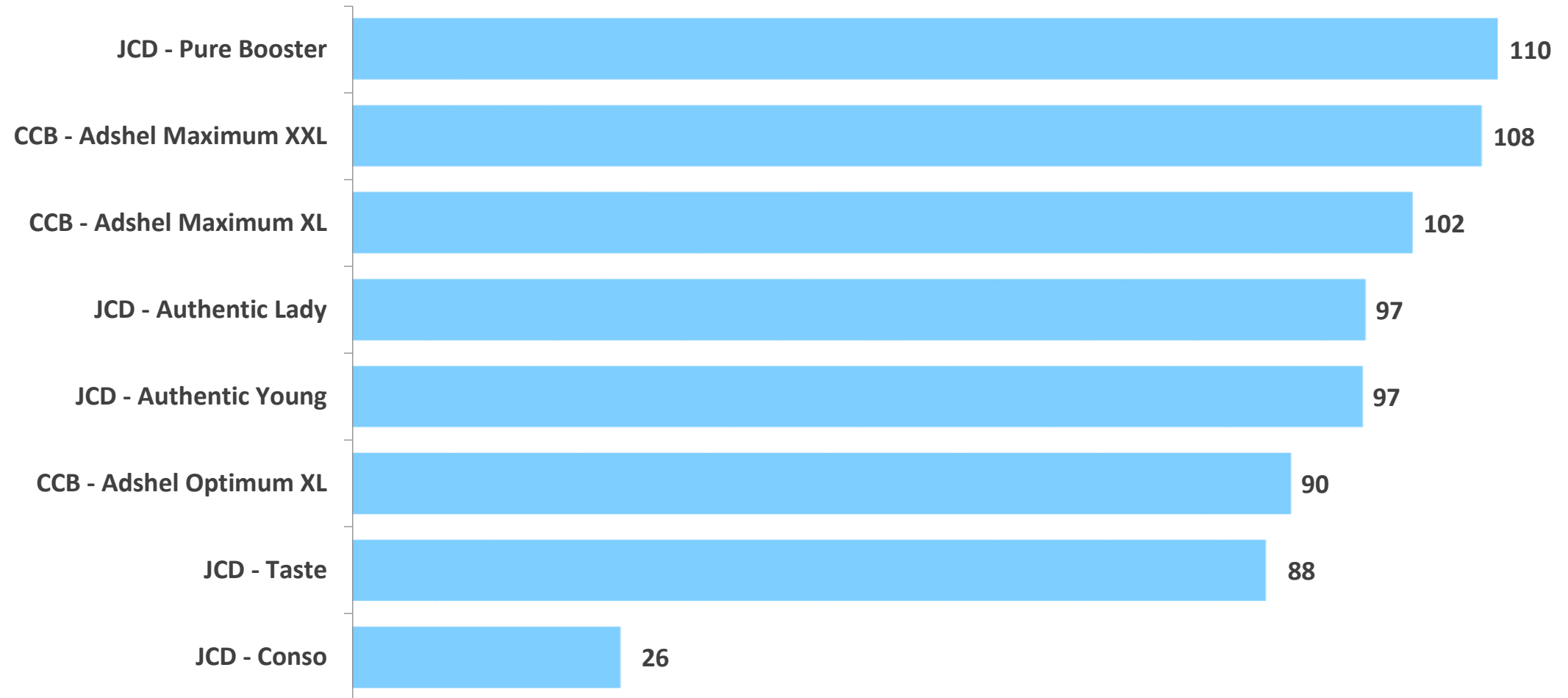
Source: CIM OOH 2017-01 / * : Visibility adjusted Rating Point



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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