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CONNECTIONS AGENCY



MARKET PERFORMANCES BAROMETER

Status June 2018

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Gross Media Investments Evolution

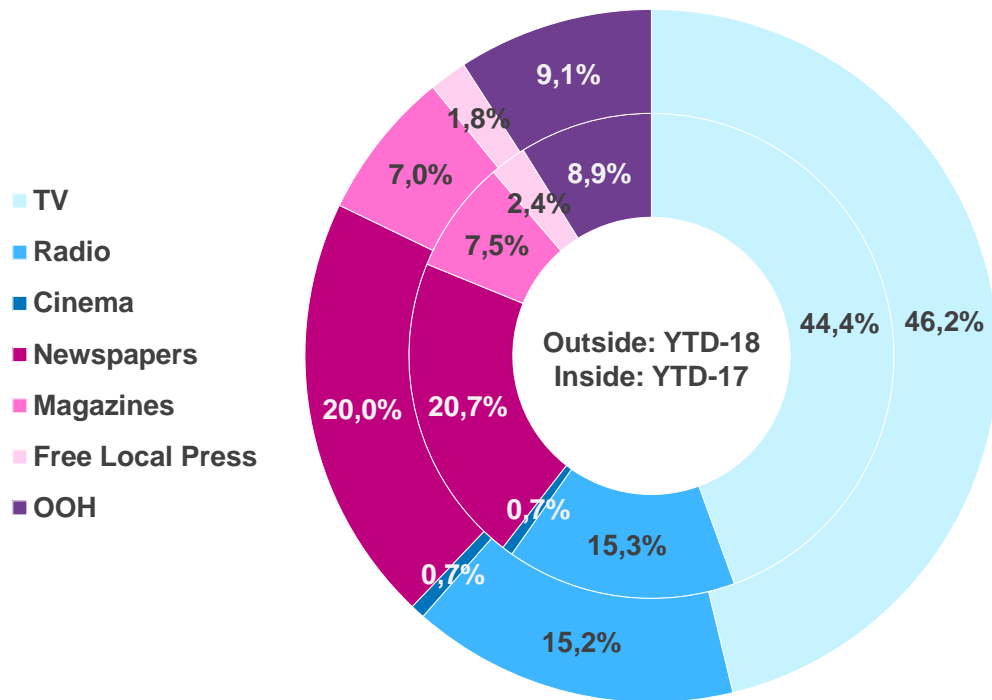
GROSS MEDIA INVESTMENTS EVOLUTION

Jan-May 2018

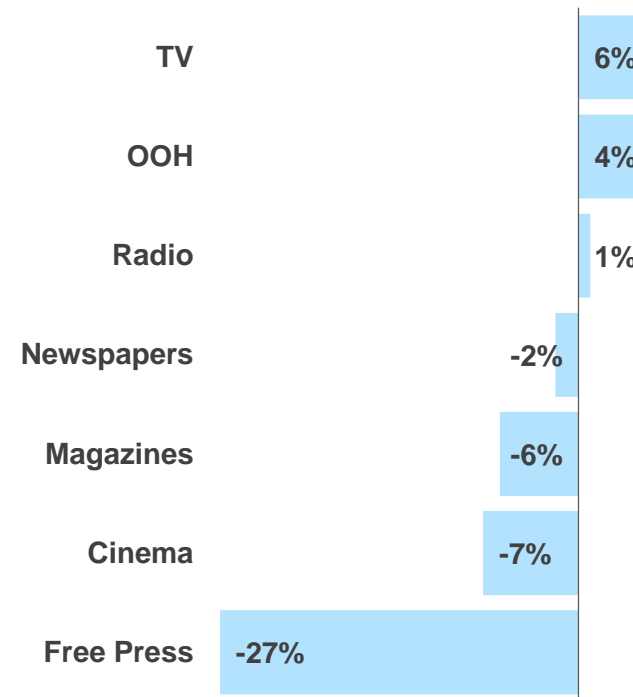
Source: MDB / Nielsen

Market	National	North	South
<ul style="list-style-type: none"> • € Mo • vs YTD-17 * • % Region 	<ul style="list-style-type: none"> • 1.508,8 • + 1,5% • 100% 	<ul style="list-style-type: none"> • 892,4 • + 0,3% • 59% 	<ul style="list-style-type: none"> • 616,5 • + 3,2% • 41%

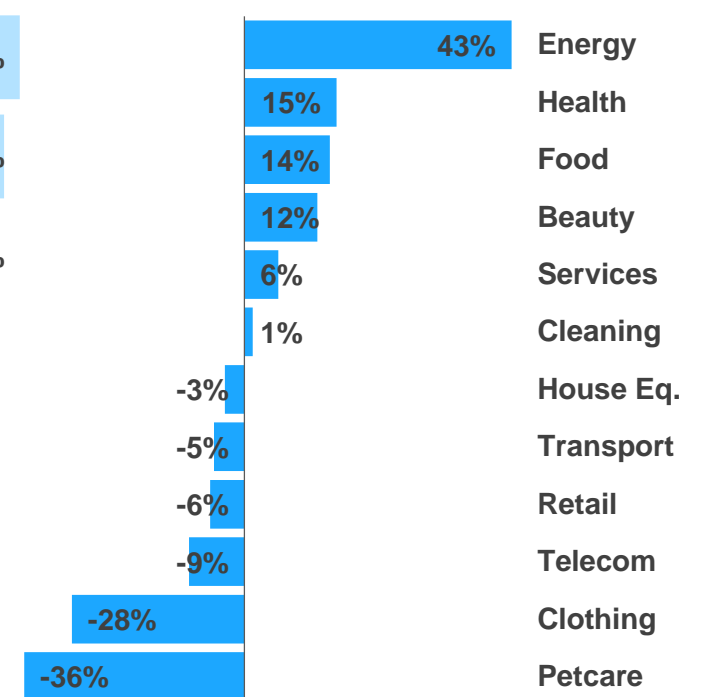
Media Mix Evol.



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-May 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	49,97	↑ 120	16	BEIERSDORF	11,2	↑ 118
2	D'IETEREN GROUP	35,05	↔ 99	17	ANHEUSER BUSCH INBEV	10,8	↑ 214
3	COCA-COLA COMPANY	27,6	↑ 158	18	BELFIUS	9,9	↑ 149
4	RECKITT & BENCKISER	25,4	↓ 82	19	FERRERO	9,6	↑ 110
5	UNILEVER	23,2	↑ 105	20	BNP-PARIBAS	9,2	↑ 179
6	PROXIMUS GROUP	21,7	↑ 102	21	THE WALT DISNEY COMPANY	9,1	↑ 135
7	RENAULT-NISSAN ALLIANCE	18,0	↑ 109	22	AHOLD DELHAIZE	8,9	↑ 113
8	PSA PEUGEOT CITROEN	17,3	↑ 104	23	GENERAL MOTORS CORP.	8,9	↑ 147
9	TELENET GROUP	15,7	↑ 107	24	GLAXOSMITHKLINE	8,8	↓ 93
10	COLRUYT GROUP	15,2	↑ 102	25	ALDI	8,8	↑ 1287
11	MONDELEZ INTERNATIONAL	14,8	↑ 106	26	FORD MOTOR COMPANY	8,5	↓ 94
12	DANONE GROUP	13,2	↑ 129	27	LOTERIE NATIONALE	8,2	↑ 115
13	FIAT CHRYSLER AUTOMOBILES	13,1	↑ 109	28	BMW GROUP	7,7	↓ 56
14	ORANGE	12,4	↓ 75	29	ING GROUP	7,7	↑ 124
15	L'OREAL GROUP	11,6	↑ 110	30	LVMH	7,4	↑ 108

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



Key TV Figures

Key TV figures North - Jun-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	
		Jun-18	YTD	Jun-18	YTD	Jun-18	YTD
VTM	PRP 18-54	5,2	6,9	21,3	24,7	1.189	903
Q2	PRP 18-44	1,6	2,1	7,3	8,3	1.137	849
VITAYA	PRP 18-54	1,1	1,3	4,6	4,5	1.002	827
VIER	PRP 18-54	1,6	2,9	6,7	10,2	1.049	1.024
VIJF	PRP 18-54	1,1	1,8	4,6	6,3	908	762
Total TV	PRP 18-54	24,4	28,1				
Total TV	PRP 18-44	22,0	25,2				

Key TV indexes North - Jun-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Jun-18 vs P-1	YTD	Jun-18 vs P-1	YTD	Jun-18 vs Channel's Objective	YTD
VTM	PRP 18-54	↓ 86	↓ 98	↓ 82	↓ 97	✗ 117	! 101
Q2	PRP 18-44	↓ 78	↓ 98	↓ 75	↓ 96	✗ 120	✗ 102
VITAYA	PRP 18-54	↓ 96	↓ 97	↓ 91	↓ 96	✗ 119	✗ 113
VIER	PRP 18-54	↓ 84	↓ 97	↓ 80	↓ 96	✗ 104	✗ 110
VIJF	PRP 18-54	↓ 96	↑ 117	↓ 91	↑ 116	✗ 110	✓ 99
Total TV	PRP 18-54	↑ 105	↔ 101				
Total TV	PRP 18-44	↑ 104	↑ 102				

Time Shift Viewing & Other TV Screen Usage Evolution

Market: NORTH - Period: Jan-Jun - 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	29,4%	29,2%	29,0%	29,2%	101
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	87,7%	85,7%	86,0%	83,8%	97
	VHS + DVD player + Blue Ray	"	3,7%	4,5%	3,9%	3,6%	92
	Video on demand + Digital recorder	"	7,6%	8,5%	8,8%	11,2%	126
	Game console and other devices (3)	"	1,0%	1,3%	1,2%	1,4%	115
% Time shift viewing (4)	All Channels	"	12,2%	15,6%	24,3%	25,7%	106
	Main Channels (5)	"	14,9%	19,8%	27,3%	30,0%	110
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	86	87	86	
	Main channels (5) - TSV	"	26	27	30	34	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	130	120	109	107	98
	All TV channels (TSV)	"	15	19	30	31	105
	All TV channels (Live + TSV)	"	145	139	139	138	99
	Other TV Screen Usage	"	28	30	30	35	117
	Total TV Screen Usage	"	172	170	169	173	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 - Jun-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	
		Jun-18	YTD	Jun-18	YTD	Jun-18	YTD
RTL-TVI	PRP 18-54	5,1	7,5	19,4	26,2	910	836
Club-RTL	MEN 18-54	0,8	1,5	3,6	6,5	1.072	966
Plug-RTL	ALL 15-34	0,5	0,7	3,2	4,2	854	923
La Une	PRP 18-54	4,6	3,8	17,2	13,3	637	758
La Deux	PRP 18-54	5,7	2,3	21,6	7,9	616	656
AB3	PRP 18-44	2,0	2,4	8,8	9,9	639	654
TF1	PRP 18-54	2,2	3,7	8,2	13,0	Package	Package
TTV	PRP 18-54	26,4	28,4				
TTV	PRP 18-44	23,3	24,5				
TTV	ALL 15-34	16,2	16,3				
TTV	MEN 18-54	23,1	22,3				

Key TV indexes South - Jun-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Jun-18 vs P-1	YTD	Jun-18 vs P-1	YTD	Jun-18 vs Channel's Objective	YTD
RTL-TVI	PRP 18-54	↓ 71	↓ 93	↓ 71	↓ 97	✗ 133	✗ 107
Club-RTL	MEN 18-54	↓ 68	↓ 97	↓ 60	↘ 99	✗ 142	✗ 115
Plug-RTL	ALL 15-34	↓ 65	↓ 77	↓ 62	↓ 83	✗ 129	✗ 118
La Une	PRP 18-54	↑ 125	↓ 94	↑ 124	↓ 98	✓ 92	✗ 107
La Deux	PRP 18-54	↑ 371	↑ 147	↑ 369	↑ 154	✓ 90	✗ 109
AB3	PRP 18-44	→ 100	↓ 98	↓ 97	↑ 103	✗ 114	! 101
TF1	PRP 18-54	↓ 59	↓ 82	↓ 58	↓ 86		
TTV	PRP 18-54	↘ 101	↓ 96				
TTV	PRP 18-44	↑ 103	↓ 95				
TTV	ALL 15-34	↑ 105	↓ 93				
TTV	MEN 18-54	↑ 114	↓ 98				

Time Shift Viewing & Other TV Screen Usage Evolution

Market: SOUTH - Period: Jan-Jun - 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	33,3%	34,7%	33,3%	32,7%	98
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	81,6%	81,8%	78,7%	76,0%	97
	VHS + DVD player + Blue Ray	"	7,4%	6,7%	7,1%	6,6%	92
	Video on demand + Digital recorder	"	9,9%	10,7%	13,4%	16,7%	124
	Game console and other devices (3)	"	1,2%	0,8%	0,7%	0,8%	111
% Time shift viewing (4)	All Channels	"	7,9%	12,4%	18,1%	20,7%	114
	Main Channels (5)	"	8,5%	13,2%	19,8%	21,4%	108
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	90	88	88	84	
	Main channels (5) - TSV	"	43	51	51	51	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	165	164	144	133	92
	All TV channels (TSV)	"	12	20	27	28	102
	All TV channels (Live + TSV)	"	177	184	171	160	94
	Other TV Screen Usage	"	48	50	54	59	111
	Total TV Screen Usage	"	225	234	225	220	98

(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 - Jun-18

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

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.145.666	11	Gazet van Antwerpen	262.230
2	Nieuwsblad	993.144	12	Immoweb	229.048
3	2dehands.be-2ememain.be	561.729	13	Le Soir	203.251
4	Sporza	458.800	14	Het Belang van Limburg	186.426
5	RTBF.be	362.474	15	Knack-Le Vif	174.287
6	De Standaard	323.616	16	De Morgen	144.637
7	VRT	316.617	17	La Libre.be	143.168
8	Sudinfo	307.568	18	L'Avenir.net	125.404
9	RTL.be	269.378	19	7sur7.be	124.900
10	DH.be	267.454	20	VTM	121.489

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



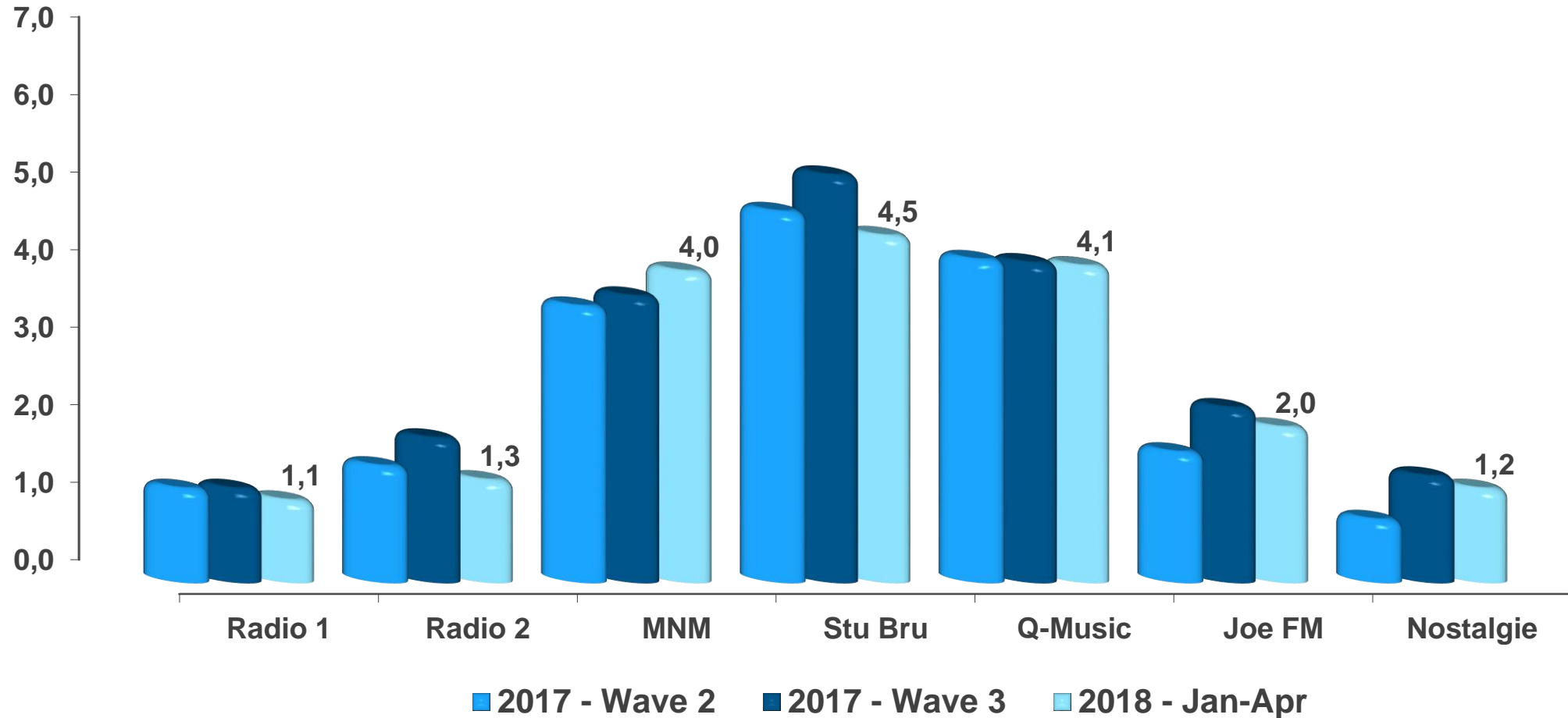
Key Radio Figures

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

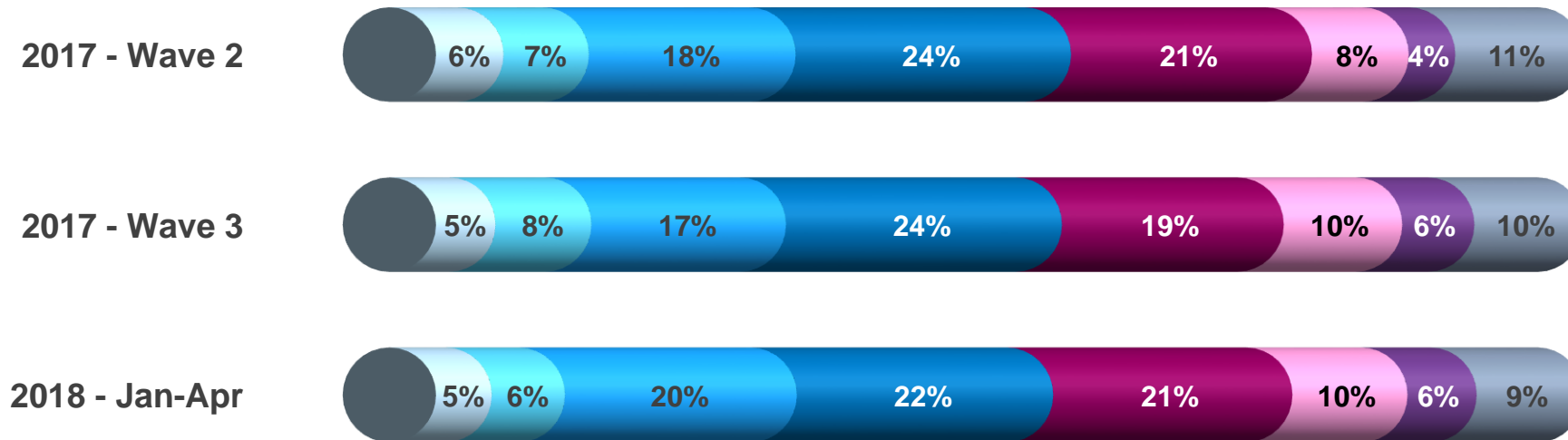


KEY RADIO FIGURES NORTH

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

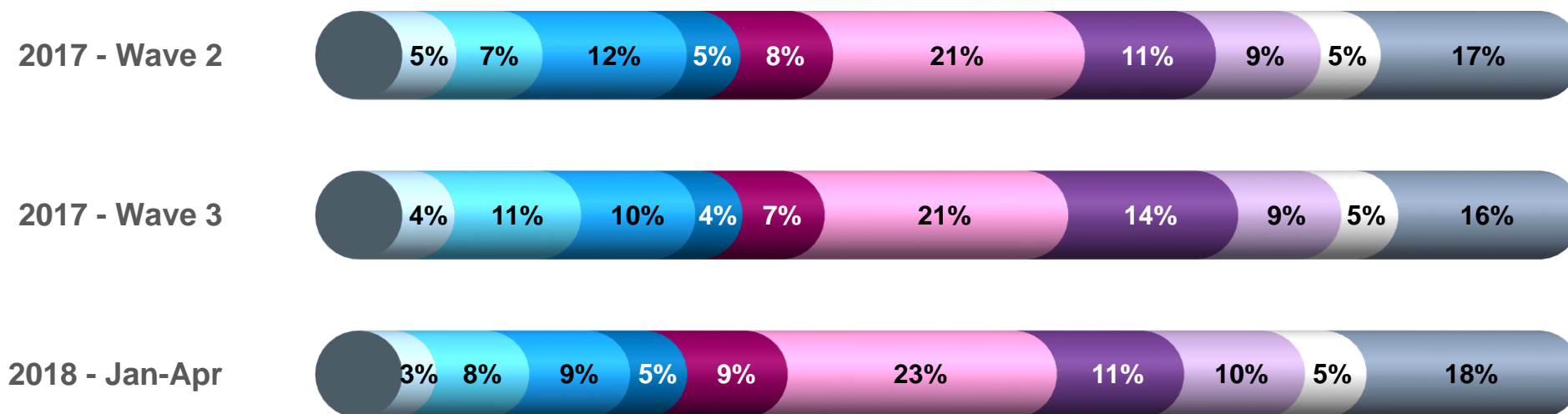


KEY RADIO FIGURES NORTH

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	260.735	↓ 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

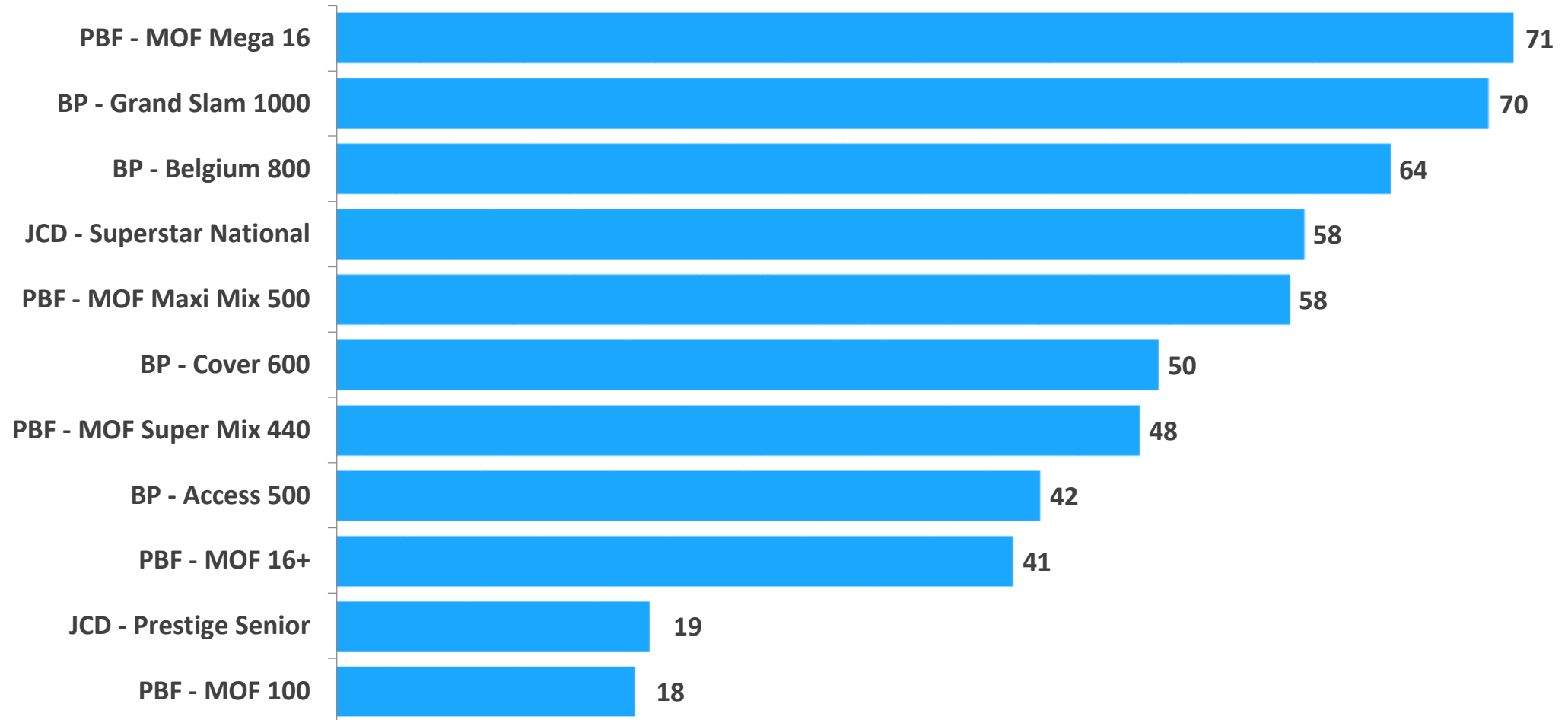


OOH ratings

Key OOH Figures - Panoramic & Classic billboards

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

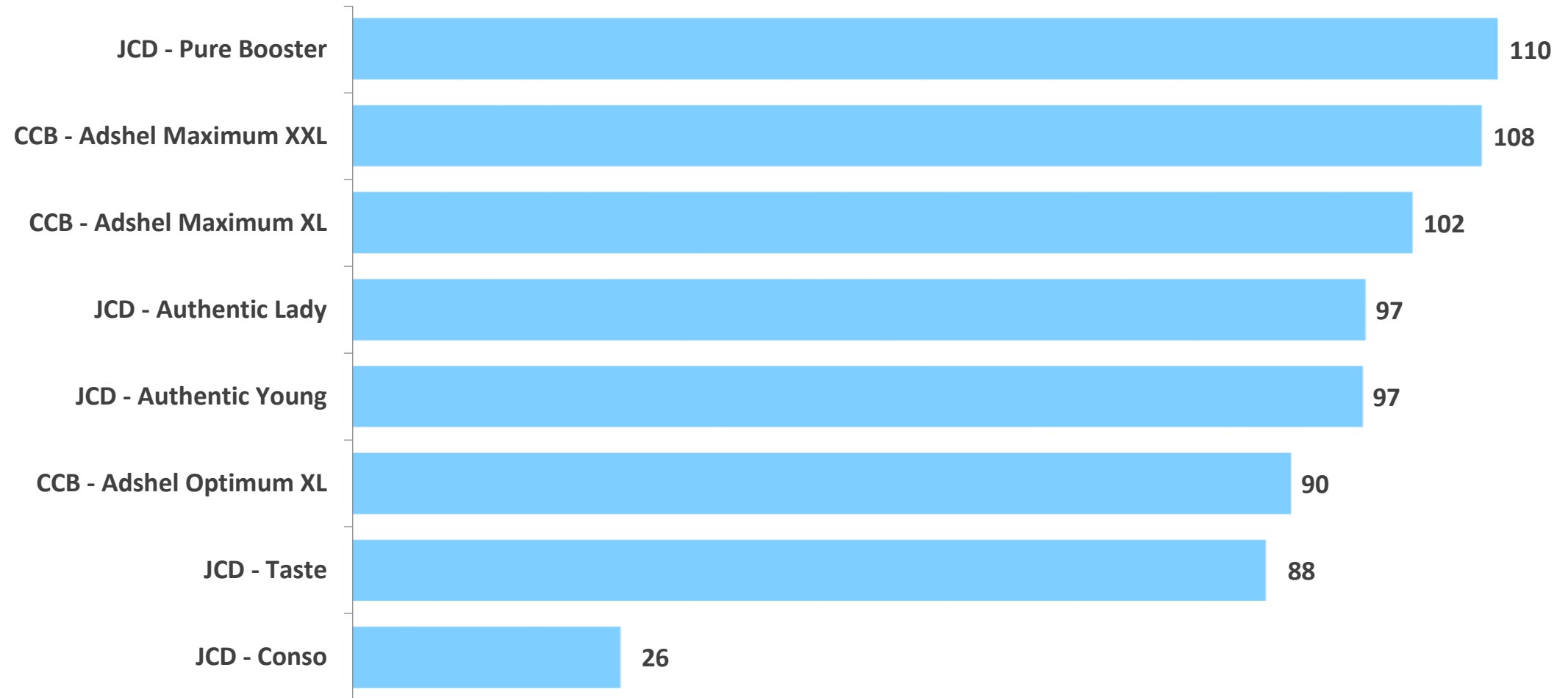
Source: CIM OOH 2017-01 / * : Visibility adjusted Rating Point



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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