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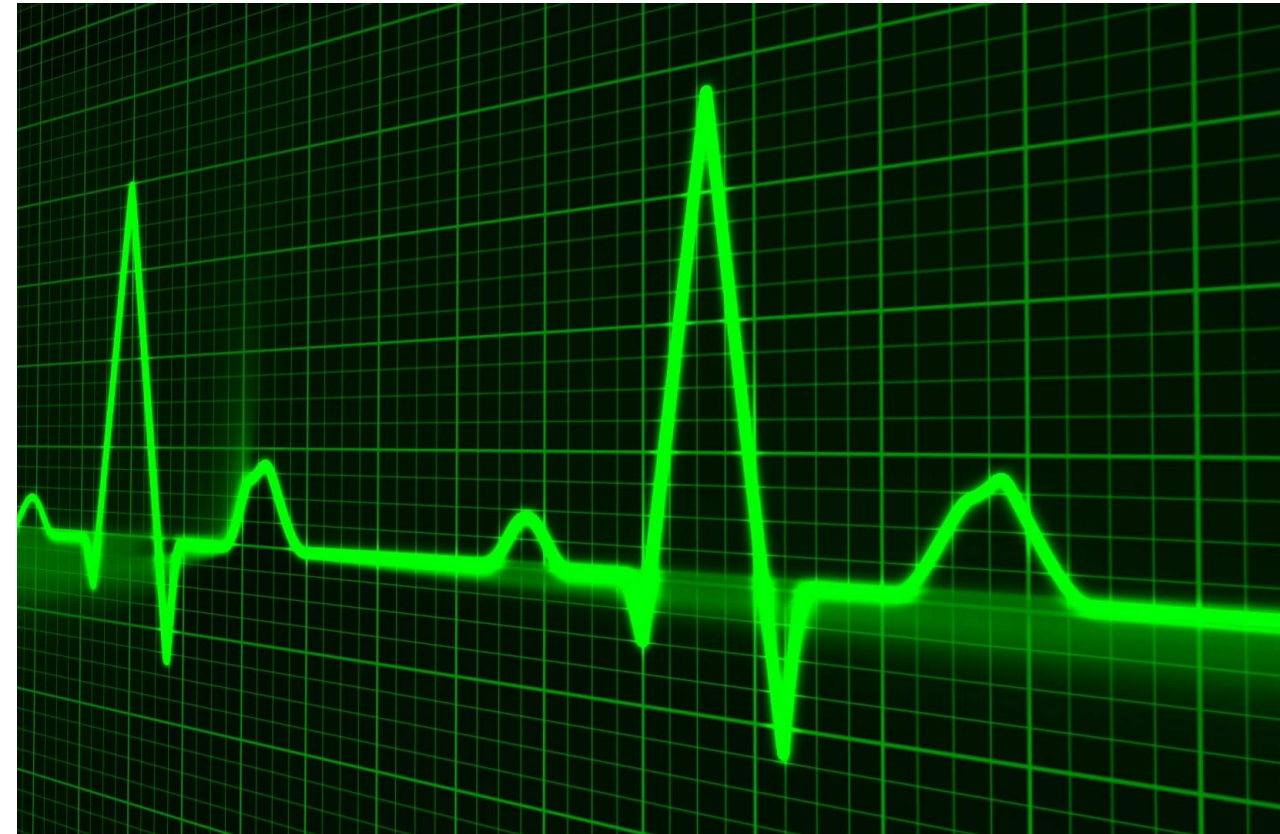
CONNECTIONS AGENCY



intelligence
Market & Business

MARKET PERFORMANCES BAROMETER

September 2019



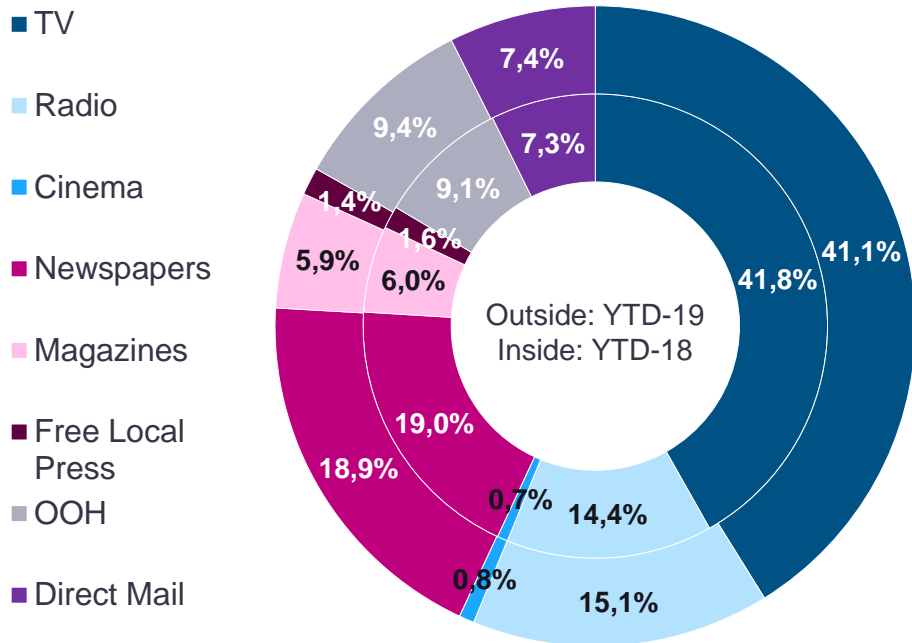
Gross Media Investments Evolution

GROSS MEDIA INVESTMENTS EVOLUTION - Jan-Aug 2019

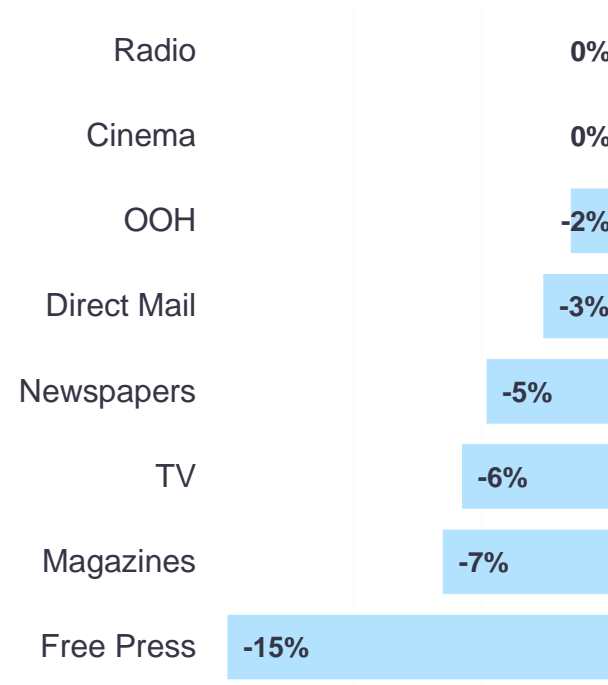
NB : 1) No Internet figures in MDB for 2018 & 2019. 2) Direct Mail : New in 2019.

Market	National	North	South
<ul style="list-style-type: none"> ■ € Mo ■ vs YTD-18 ■ % Region 	2.318,2 - 4,9% 100%	1.404,8 - 3,3% 61%	913,4 - 7,1% 39%

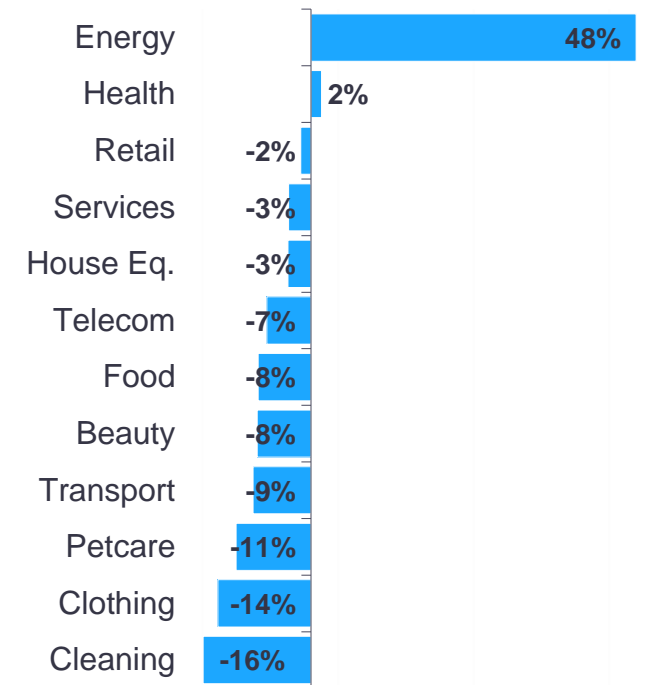
Media Mix Evol.



Media Evol. (vs YTD-18)



EcoGroups Evol. (vs YTD-18)



MDB TOP 30 ADVERTISERS - Jan-Aug 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	PROCTER & GAMBLE	66,6	↓ 86
2	COLRUYT GROUP	62,1	↓ 92
3	THE COCA-COLA COMPANY	51,2	↓ 86
4	D'IETEREN GROUP	42,2	↓ 91
5	PSA GROUPE	37,9	↑ 107
6	UNILEVER	34,8	↓ 90
7	RECKITT & BENCKISER	32,7	↓ 87
8	PROXIMUS GROUP	30,7	↓ 81
9	AHOLD DELHAIZE	29,0	↑ 124
10	FERRERO	23,7	↑ 155
11	TELENET GROUP HOLDING	21,8	↓ 90
12	RENAULT-NISSAN ALLIANCE	21,7	↓ 91
13	ORANGE	20,7	↓ 94
14	VINTED	20,7	-
15	CARREFOUR GROUP	20,4	↑ 113

Rank	ADV.GROUP	Gross Inv.	vs YTD-18
16	L'OREAL GROUP	16,2	↓ 92
17	THE WALT DISNEY COMPANY	15,9	↑ 109
18	MONDELEZ INTERNATIONAL	15,1	↓ 79
19	FIAT CHRYSLER AUTOMOBILES	14,7	↓ 88
20	LOTERIE NATIONALE	14,2	↓ 87
21	ALDI	14,2	↑ 119
22	METRO GROUP	13,5	↑ 114
23	NETHYS	13,2	↑ 103
24	GROUPE 3 SUISSES	13,1	↓ 94
25	BEIERSDORF	12,9	↓ 82
26	AS WATSON	12,2	↓ 98
27	LIDL & CO	11,8	↑ 120
28	DANONE GROUP	11,2	↓ 65
29	BMW GROUP BELGIUM	10,8	↑ 104
30	BELFIUS	10,8	↓ 78



Key TV figures

Key TV figures North - Sep-19

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - no commission) Total Day	
		Sep-19	YTD	Sep-19	YTD	Sep-19	YTD
VTM	PRP 18-54	6,9	6,1	25,9	23,6	1.239	927
Q2	PRP 18-44	1,4	1,6	6,1	7,0	1.538	943
VITAYA	PRP 18-54	1,2	1,4	4,5	5,3	1.031	885
CAZ	MEN 18-54	0,5	0,5	2,1	2,2	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	3,9	3,1	14,5	12,1	1.111	915
VIJF	PRP 18-54	1,4	1,5	5,2	5,7	1.026	786
ZES	PRP 18-54	0,5	0,6	1,9	2,2	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	26,7	25,7				
Total TV	PRP 18-44	22,4	22,3				
Total TV	MEN 18-54	22,0	21,2				

Key TV indexes North - Sep-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	
		Sep-19	YTD	Sep-19	YTD	Sep-19	YTD
VTM	PRP 18-54	↓ 98	↓ 97	↓ 96	↓ 98	✗ 116	✗ 108
Q2	PRP 18-44	↓ 84	↓ 83	↓ 88	↓ 87	✗ 155	✗ 118
VITAYA	PRP 18-54	→ 100	↑ 111	↓ 98	↑ 112	✗ 117	✗ 125
CAZ	MEN 18-54	↑ 112	↓ 98	↑ 109	↑ 102	Package	Package
VIER	PRP 18-54	↑ 105	↑ 117	↑ 103	↑ 119	✓ 99	⚠ 101
VIJF	PRP 18-54	↓ 83	↓ 90	↓ 82	↓ 92	✗ 110	✗ 105
ZES	PRP 18-54	↓ 89	↓ 90	↓ 88	↓ 92	Package	Package
Total TV	PRP 18-54	↑ 102	↓ 98				
Total TV	PRP 18-44	↓ 95	↓ 95				
Total TV	MEN 18-54	↑ 104	↓ 96				

Time Shift Viewing & Other TV Screen Usage Evolution - NORTH

Period: Jan-Sep - 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
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	27,3%	27,8%	27,5%	27,3%	99
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	85,5%	85,4%	83,0%	81,2%	98
	VHS + DVD player + Blu-Ray	"	4,4%	4,1%	3,6%	2,5%	71
	Video on demand + Digital recorder	"	8,9%	9,2%	11,9%	14,6%	122
	Game console and other devices (3)	"	1,3%	1,3%	1,6%	1,7%	108
% Time shift viewing (4)	All Channels	"	16,3%	23,4%	25,3%	29,0%	114
	Main Channels (5)	"	20,6%	26,2%	29,9%	32,9%	110
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	85	87	86	85	
	Main channels (5) - TSV	"	28	30	34	35	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	112	106	101	94	93
	All TV channels (TSV)	"	19	28	29	31	106
	All TV channels (Live + TSV)	"	131	133	130	125	96
	Other TV Screen Usage	"	29	30	35	37	106
	Total TV Screen Usage	"	160	164	165	162	98

Key TV figures South - Sep-19

CHANNEL	CHANNEL'S MARKETING TARGET	RATING (%) 17:00-23:00		AUDIENCE SHARE (%) 17:00-23:00		C/GRP (€ - with comm.) Total Day	
		Sep-19	YTD	Sep-19	YTD	Sep-19	YTD
RTL-TVI	PRP 18-54	5,7	6,5	23,7	25,7	989	784
Club-RTL	MEN 18-54	1,3	1,3	7,3	6,9	913	825
Plug-RTL	ALL 15-34	0,5	0,6	3,7	3,9	1.102	771
La Une	PRP 18-54	3,9	3,5	16,2	13,9	743	619
La Deux	PRP 18-54	1,5	1,3	6,2	5,2	622	571
AB3	PRP 18-44	1,6	2,3	8,4	10,5	847	655
TF1	PRP 18-54	2,7	2,9	11,2	11,4	<i>Package</i>	<i>Package</i>
TTV	PRP 18-54	24,1	25,4				
TTV	PRP 18-44	19,3	21,4				
TTV	ALL 15-34	12,7	14,5				
TTV	MEN 18-54	17,7	19,3				

Key TV indexes South - Sep-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	
		Sep-19	YTD	Sep-19	YTD	Sep-19	YTD
RTL-TVI	PRP 18-54	↓ 89	↓ 95	↓ 93	→ 100	✗ 116	✗ 105
Club-RTL	MEN 18-54	↓ 86	↓ 93	↓ 95	→ 101	✗ 104	✗ 105
Plug-RTL	ALL 15-34	↓ 85	↓ 93	↓ 92	↓ 97	✗ 139	✗ 109
La Une	PRP 18-54	↑ 111	↓ 93	↑ 116	↓ 98	✓ 97	✗ 103
La Deux	PRP 18-54	↑ 108	↓ 64	↑ 112	↓ 67	✓ 86	✓ 100
AB3	PRP 18-44	↓ 59	→ 100	↓ 67	↑ 107	✗ 116	✗ 112
TF1	PRP 18-54	↓ 88	↓ 86	↓ 92	↓ 90	<i>Package</i>	<i>Package</i>
TTV	PRP 18-54	↓ 96	↓ 95				
TTV	PRP 18-44	↓ 89	↓ 94				
TTV	ALL 15-34	↓ 95	↓ 97				
TTV	MEN 18-54	↓ 91	↓ 92				

Time Shift Viewing & Other TV Screen Usage Evolution - SOUTH

Period: Jan-Sep - 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
Rating (%)	TSU (Total Screen Usage) (1)	17-23:00	32,8%	31,9%	31,0%	30,4%	98
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	81,0%	78,0%	75,2%	72,4%	96
	VHS + DVD player + Blu-Ray	"	6,9%	7,3%	6,6%	5,0%	76
	Video on demand + Digital recorder	"	11,3%	14,0%	17,5%	21,4%	122
	Game console and other devices (3)	"	0,9%	0,7%	0,7%	1,2%	165
% Time shift viewing (4)	All Channels	"	12,8%	18,1%	20,3%	21,5%	106
	Main Channels (5)	"	13,8%	19,8%	20,9%	22,1%	106
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	88	83	87	
	Main channels (5) - TSV	"	52	53	51	50	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	156	137	125	121	97
	All TV channels (TSV)	"	19	26	26	27	105
	All TV channels (Live + TSV)	"	175	163	151	148	98
	Other TV Screen Usage	"	50	54	58	65	111
	Total TV Screen Usage	"	224	217	209	213	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 - Sep-19

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.427.555	11	Le Soir	287.846
2	Nieuwsblad	941.607	12	Gazet van Antwerpen	283.757
3	Sudinfo	559.604	13	Immoweb	250.564
4	DH.be	361.294	14	Het Belang van Limburg	201.270
5	2dehands.be-2ememain.be	359.547	15	De Morgen	177.902
6	RTL.be	339.757	16	7sur7.be	155.453
7	VRT	336.571	17	L'Avenir.net	152.610
8	RTBF.be	321.638	18	Sudpresse	145.413
9	De Standaard	308.192	19	La Libre.be	141.963
10	Sporza	306.499	20	Flair	141.118

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

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

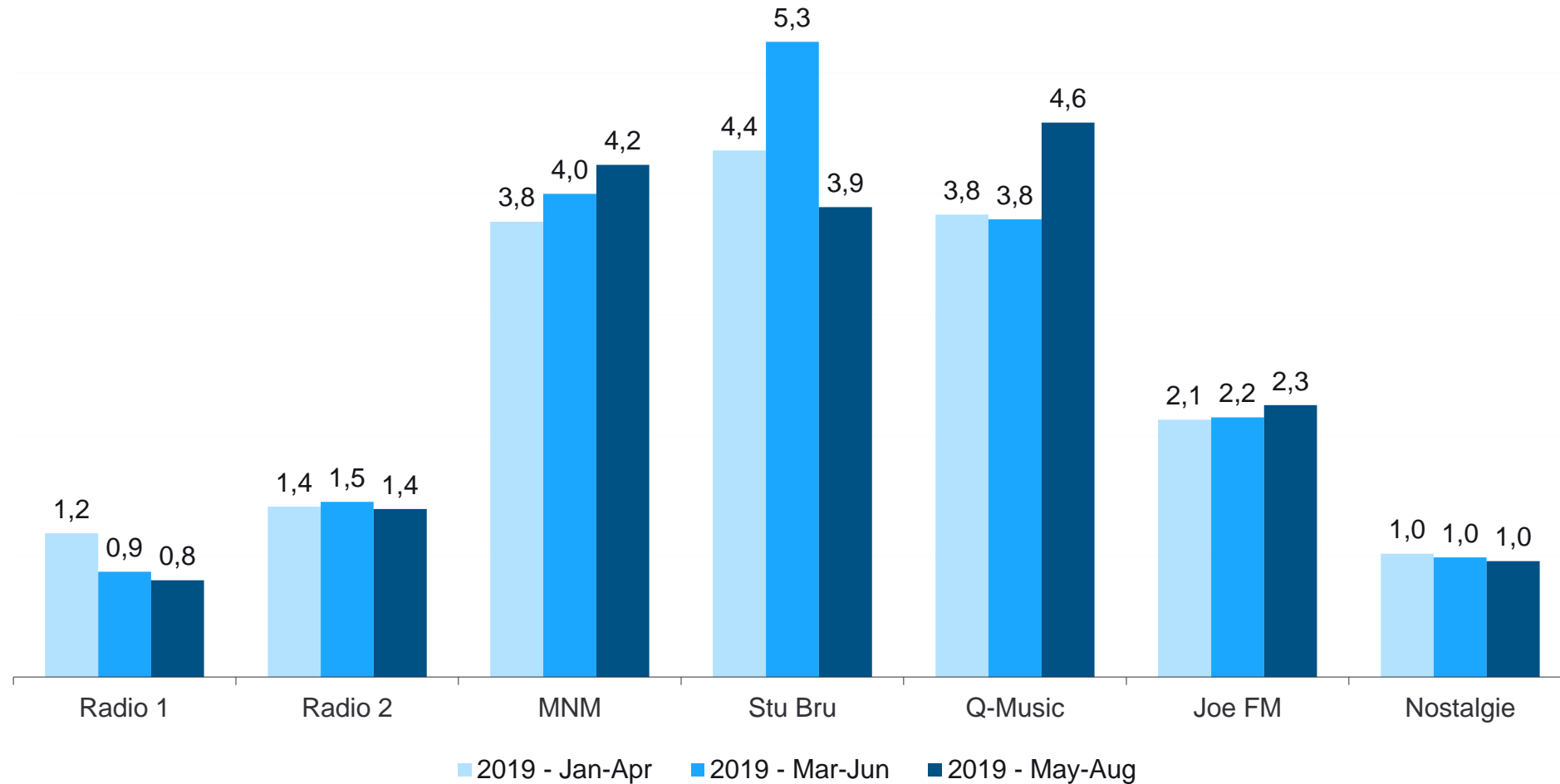
Website	Daily Visitors (000)
MSN.COM	1.022
GOOGLE.BE	1.012
MSN.BE	866
FACEBOOK.COM	657
LINKEDIN.COM	630
LIVE.COM	615
GOOGLE.COM	433
BING.COM	365
YOUTUBE.COM	327
YAHOO.COM	265



Key Radio figures

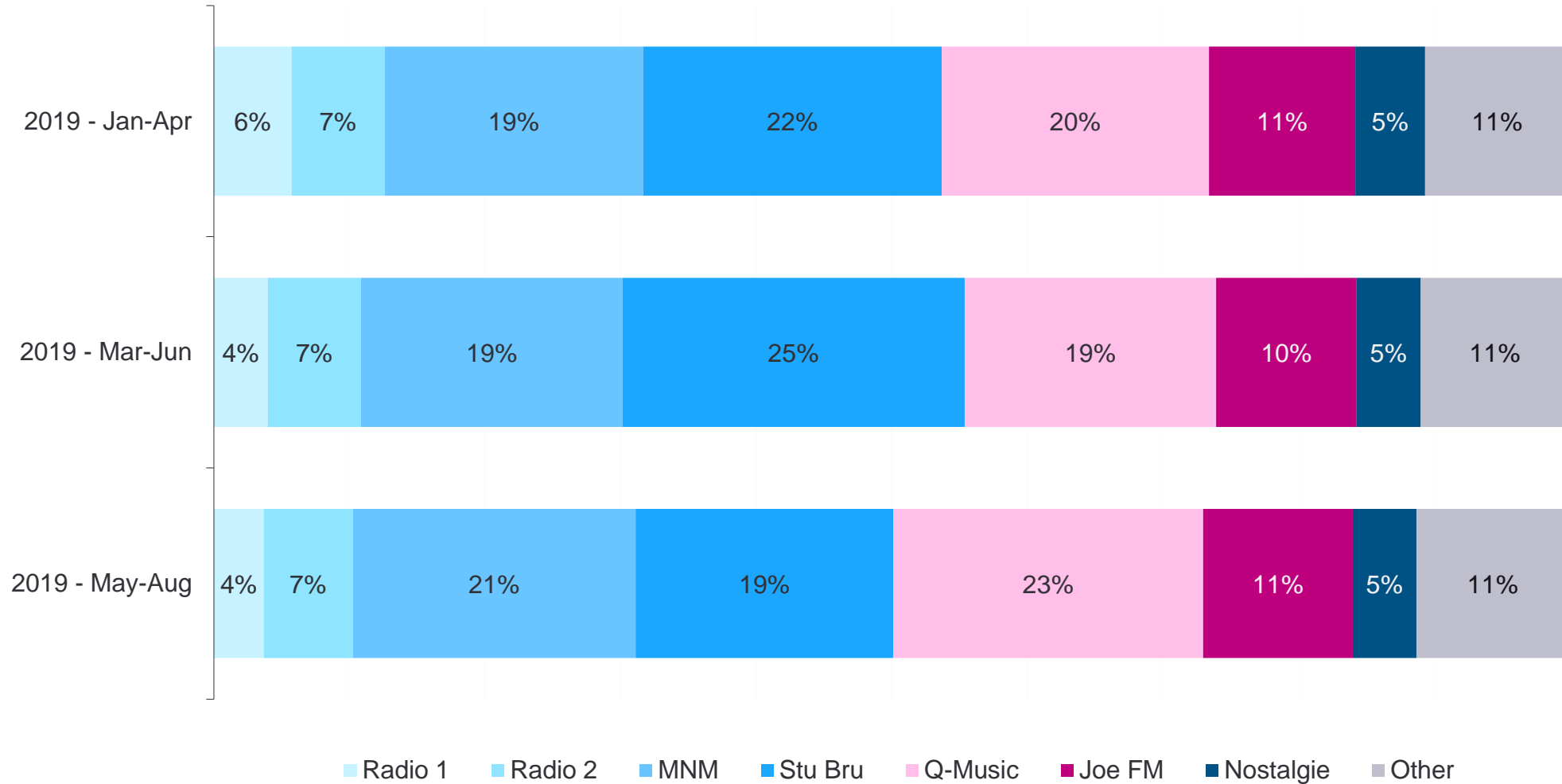
KEY RADIO FIGURES NORTH

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



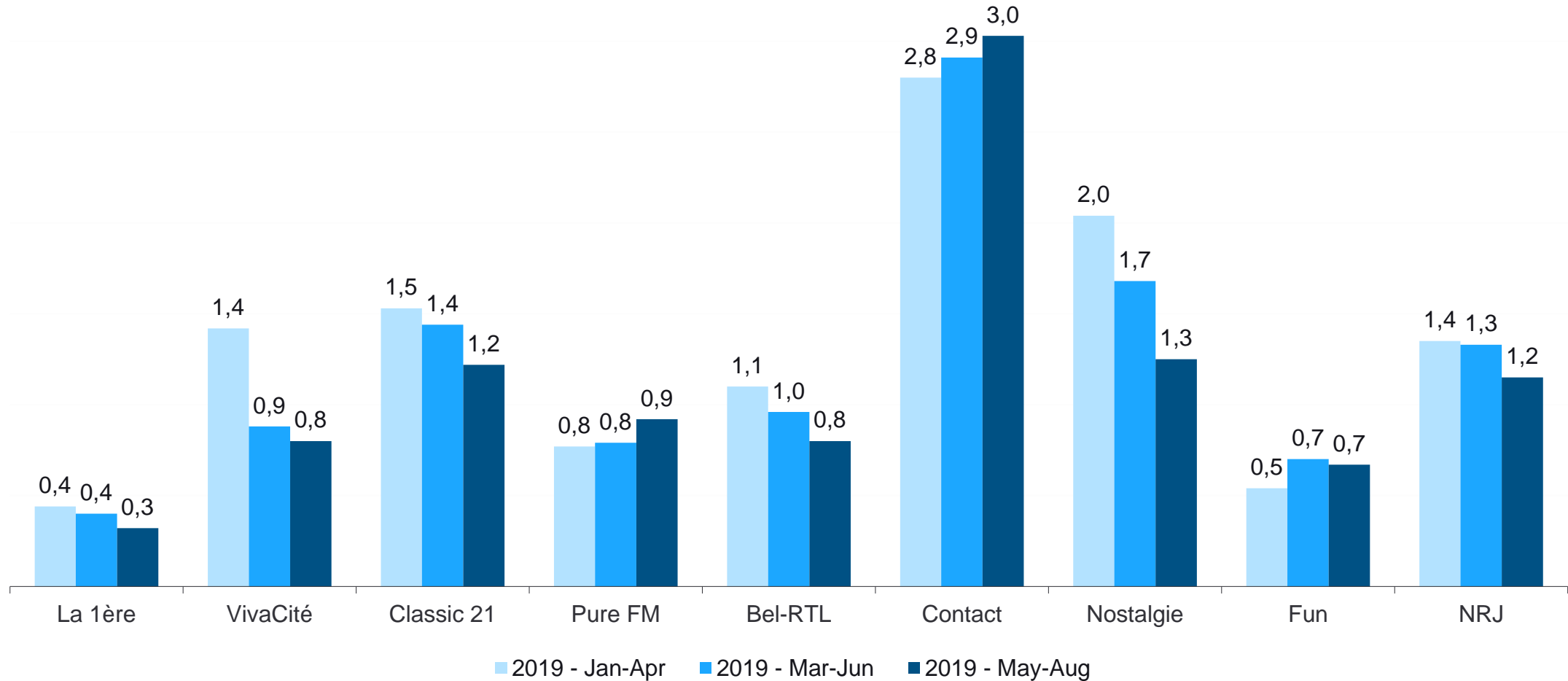
KEY RADIO FIGURES NORTH

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



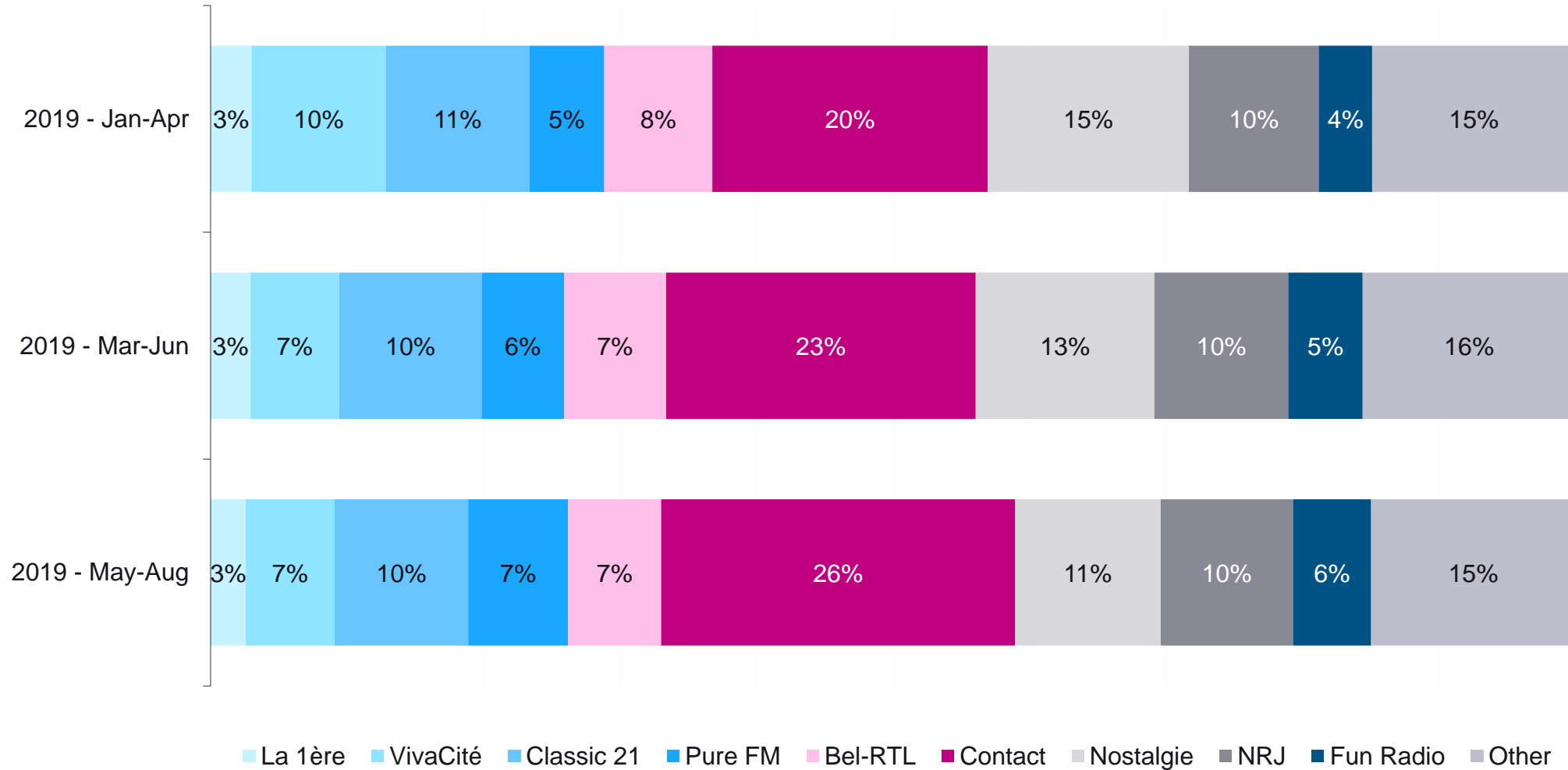
KEY RADIO FIGURES SOUTH

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	258.474	↓ 99	9%	↑ 150
Het Nieuwsblad	220.949	↓ 97	7%	↑ 138
De Standaard	104.199	↑ 103	26%	↑ 128
Het Belang van Limburg	89.435	↓ 98	8%	↑ 127
Gazet van Antwerpen	81.470	↓ 96	9%	↑ 145
De Morgen	51.883	↓ 98	36%	↑ 115
De Tijd	44.023	↑ 104	43%	↑ 112
Total North *	850.433	↓ 99	14%	↑ 130

SOUTH	Circulation (paid+free)	vs 2017	Digital Part	vs 2017
L'Avenir	77.985	↓ 97	11%	↑ 141
Sud Presse	73.569	↓ 92	10%	↑ 164
Le Soir	57.444	↓ 94	19%	↑ 132
La DH	36.650	↓ 97	13%	↑ 172
La Libre Belgique	35.501	↑ 102	22%	↑ 151
L'Echo	16.367	→ 100	47%	↑ 111
Grenz Echo	9.861	↓ 99	6%	↑ 193
Total South *	307.377	↓ 96	15%	↑ 142

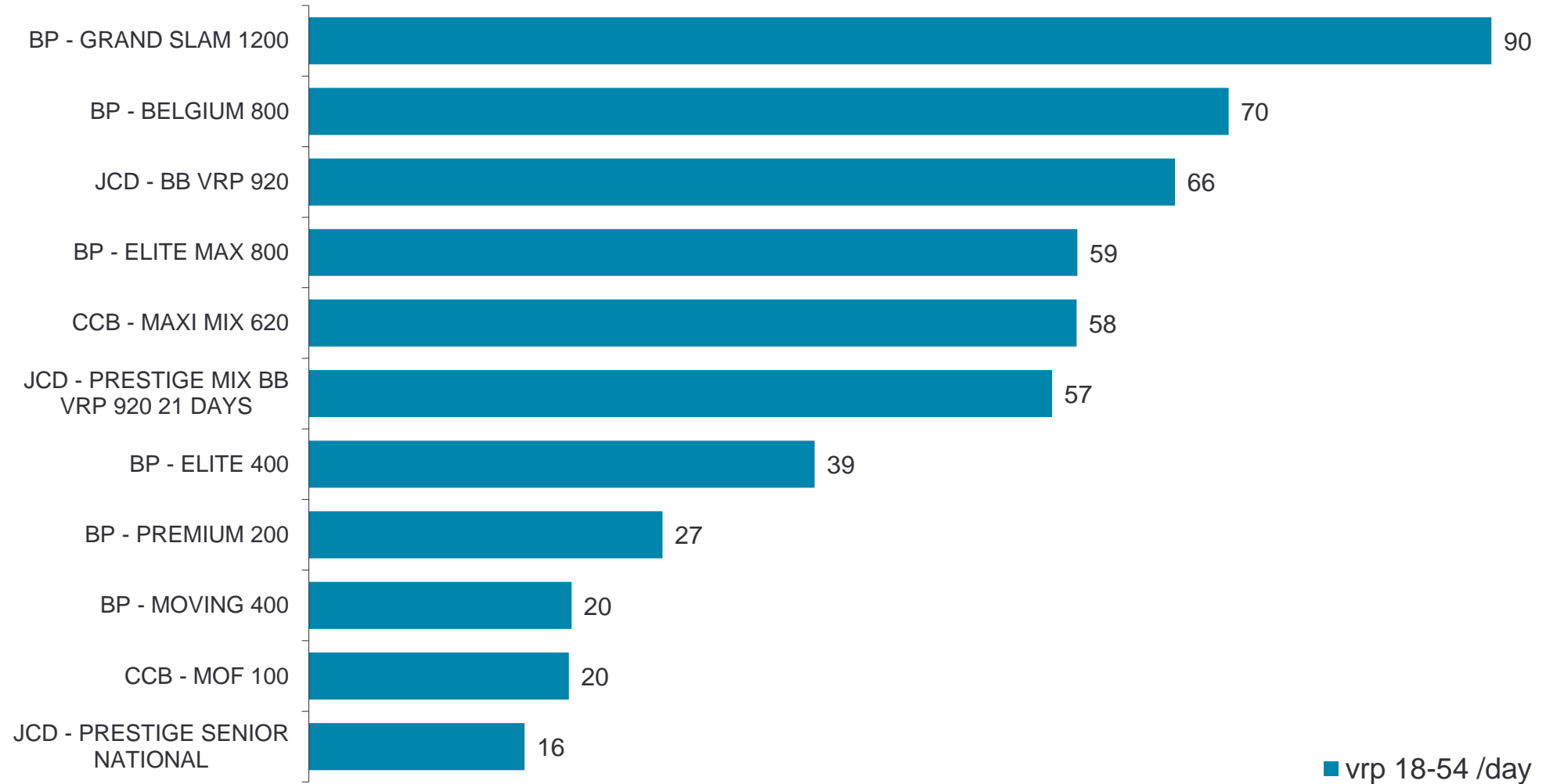
Key Print Figures - Magazines Circulation - Year 2018 (Paid + Free - digital sales included)

Categories	NL-speaking		FR-speaking		Both languages	
	Circulation	vs 2017	Circulation	vs 2017	Circulation	vs 2017
Television	631.144	↓ 94	400.474	↓ 95		
Women	335.209	↓ 91	166.308	↓ 88		
Business & News	102.555	↓ 86	135.587	↓ 94	58.095	↑ 106
Generation (Youth/Senior)			15.719	↓ 96	122.263	↑ 106
Men	26.074	↓ 92	16.334	↓ 92	43.851	↓ 92
Build & Deco	13.389	↓ 95	14.662	↓ 98	37.983	↓ 85
TOTAL	1.108.371	↓ 92	749.084	↓ 93	262.192	→ 100



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

