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CONNECTIONS AGENCY

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Gross Media Investments Evolution

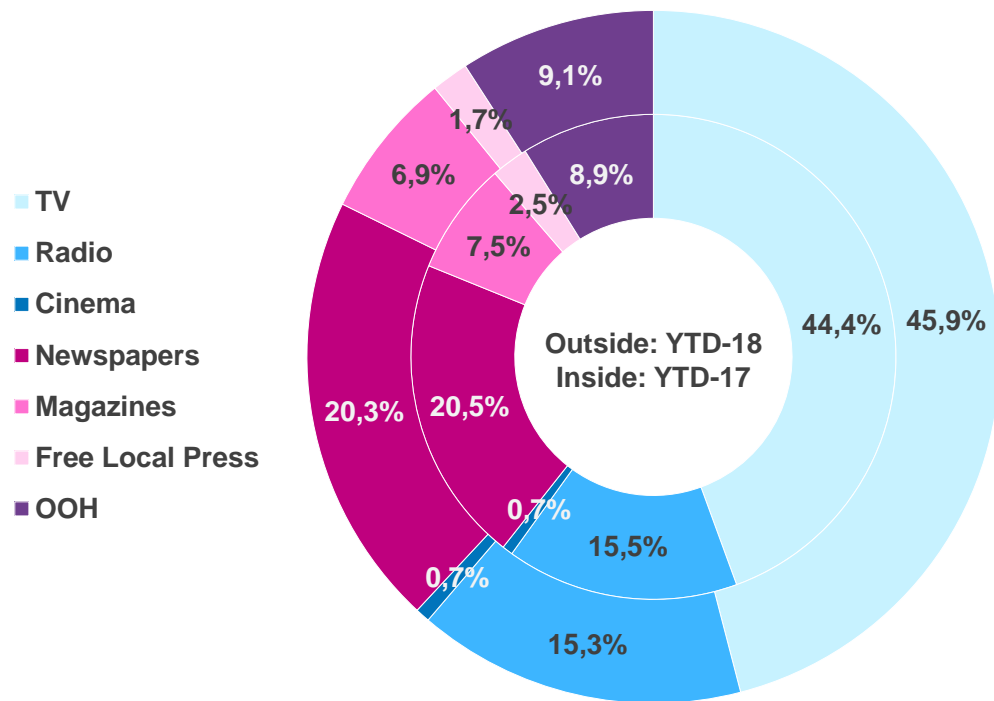
GROSS MEDIA INVESTMENTS EVOLUTION

Jan-Jun 2018

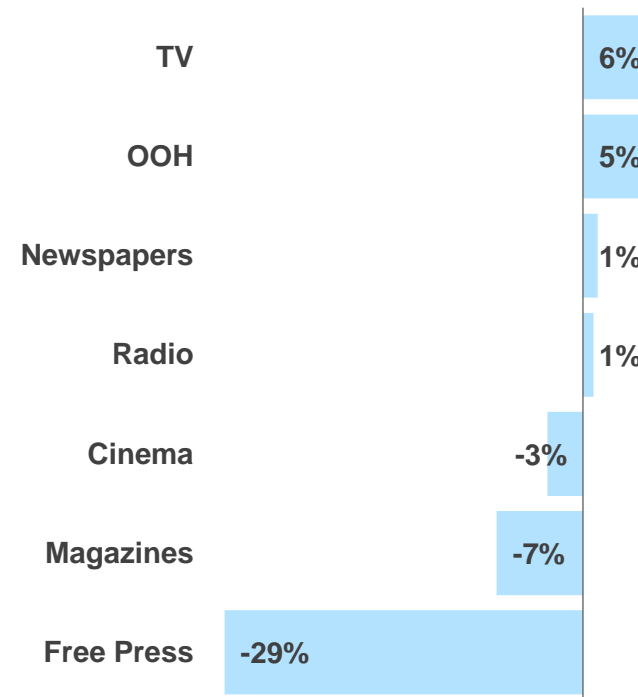
Source: MDB / Nielsen

Market	National	North	South
<ul style="list-style-type: none"> • € Mo • vs YTD-17 * • % Region 	<ul style="list-style-type: none"> • 1.814,5 • + 2,0% • 100% 	<ul style="list-style-type: none"> • 1074,8 • + 0,9% • 59% 	<ul style="list-style-type: none"> • 739,7 • + 3,7% • 41%

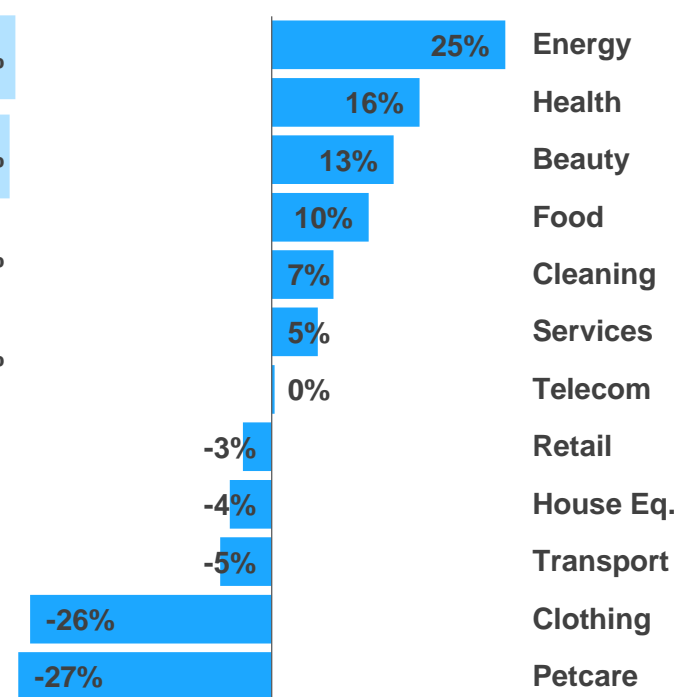
Media Mix Evol.



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-Jun 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	58,50	↑ 122	16	L'OREAL GROUP	14,3	↑ 112
2	D'IETEREN GROUP	41,88	→ 100	17	BEIERSDORF	14,0	↑ 123
3	COCA-COLA COMPANY	37,4	↑ 160	18	ALDI	11,5	↑ 1229
4	PSA GROUPE	31,1	↑ 148	19	LOTERIE NATIONALE	11,4	↑ 135
5	RECKITT & BENCKISER	30,0	↓ 85	20	FERRERO	11,2	↑ 117
6	UNILEVER	29,1	↑ 108	21	BNP-PARIBAS	10,9	↑ 156
7	PROXIMUS GROUP	27,1	↑ 111	22	DAIMLER BENZ GROUP	10,8	↓ 89
8	RENAULT-NISSAN ALLIANCE	20,9	↓ 95	23	THE WALT DISNEY COMPANY	10,8	↑ 129
9	COLRUYT GROUP	18,8	↑ 103	24	AHOLD DELHAIZE	10,6	↑ 104
10	TELENET GROUP HOLDING	18,5	↑ 107	25	GLAXOSMITHKLINE	10,5	↓ 86
11	ORANGE	17,2	↓ 90	26	BELFIUS	10,5	↑ 130
12	MONDELEZ INTERNATIONAL	17,0	↓ 95	27	NETHYS	10,3	↑ 111
13	FIAT CHRYSLER AUTOMOBILES	15,9	↑ 102	28	FORD MOTOR COMPANY	10,0	↑ 103
14	ANHEUSER BUSCH INBEV	15,7	↑ 220	29	ING GROUP	9,0	↑ 110
15	DANONE GROUP	15,4	↑ 107	30	IKEA BELGIUM	8,9	↑ 150

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



Key TV Figures

Key TV figures North - Jul-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	
		Jul-18	YTD	Jul-18	YTD	Jul-18	YTD
VTM	PRP 18-54	3,5	6,4	16,7	23,8	846	898
Q2	PRP 18-44	1,2	2,0	6,6	8,1	797	844
VITAYA	PRP 18-54	1,1	1,2	5,4	4,6	711	813
CAZ	MEN 18-54	0,4	0,5	2,1	2,1	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	1,3	2,6	6,3	9,8	578	990
VIJF	PRP 18-54	1,1	1,7	5,2	6,1	864	775
ZES	PRP 18-54	0,5	0,6	2,5	2,3	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	20,8	27,0				
Total TV	PRP 18-44	18,4	24,2				
Total TV	MEN 18-54	18,8	22,8				

Key TV indexes North - Jul-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Jul-18 vs P-1	YTD	Jul-18 vs P-1	YTD	Jul-18 vs Channel's Objective	YTD
VTM	PRP 18-54	↓ 68	↓ 94	↓ 73	↓ 95	× 127	× 105
Q2	PRP 18-44	↓ 81	↓ 96	↓ 86	↓ 95	× 129	× 106
VITAYA	PRP 18-54	↑ 114	↓ 98	↑ 121	↘ 99	× 119	× 115
CAZ	MEN 18-54	↓ 57	↑ 102	↓ 58	↗ 101	<i>Package</i>	<i>Package</i>
VIER	PRP 18-54	↓ 66	↓ 94	↓ 71	↓ 94	× 125	× 112
VIJF	PRP 18-54	↓ 80	↑ 111	↓ 84	↑ 112	! 101	! 101
ZES	PRP 18-54	↑ 127	↑ 137	↑ 135	↑ 138	<i>Package</i>	<i>Package</i>
Total TV	PRP 18-54	↓ 94	↔ 100				
Total TV	PRP 18-44	↓ 93	↗ 101				
Total TV	MEN 18-54	↓ 97	↔ 100				

Time Shift Viewing & Other TV Screen Usage Evolution

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

Source: CIM TV - Live +6 including guests (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	28,3%	28,0%	28,2%	28,2%	100
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	87,5%	85,4%	85,6%	83,6%	98
	VHS + DVD player + Blue Ray	"	3,8%	4,5%	4,0%	3,6%	89
	Video on demand + Digital recorder	"	7,8%	8,8%	9,1%	11,4%	126
	Game console and other devices (3)	"	0,9%	1,3%	1,3%	1,5%	113
% Time shift viewing (4)	All Channels	"	12,0%	15,5%	23,5%	25,0%	106
	Main Channels (5)	"	14,7%	19,7%	26,3%	29,7%	113
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	88	86	88	86	
	Main channels (5) - TSV	"	27	28	30	34	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	127	116	108	105	97
	All TV channels (TSV)	"	14	18	28	30	105
	All TV channels (Live + TSV)	"	141	135	136	134	99
	Other TV Screen Usage	"	27	30	30	35	115
	Total TV Screen Usage	"	168	165	166	169	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 - Jul-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 (€ - with comm.) Total Day	
		Jul-18	YTD	Jul-18	YTD	Jul-18	YTD
RTL-TVI	PRP 18-54	4,9	7,1	21,9	25,7	527	804
Club-RTL	MEN 18-54	1,2	1,4	6,4	6,5	394	897
Plug-RTL	ALL 15-34	0,3	0,6	2,5	4,0	812	913
La Une	PRP 18-54	4,9	4,0	21,5	14,3	516	724
La Deux	PRP 18-54	2,7	2,3	11,8	8,4	661	656
AB3	PRP 18-44	1,4	2,3	7,3	9,6	483	636
TF1	PRP 18-54	2,1	3,5	9,2	12,5	<i>Package</i>	<i>Package</i>
TTV	PRP 18-54	22,5	27,6				
TTV	PRP 18-44	18,8	23,7				
TTV	ALL 15-34	12,2	15,7				
TTV	MEN 18-54	18,7	21,8				

Key TV indexes South - Jul-18

Source: CIM TV - Live +7 including guests

CHANNEL	MARKETING TARGET	RATING 17:00-23:00		AUDIENCE SHARE 17:00-23:00		C/GRP	
		Jul-18 vs P-1	YTD	Jul-18 vs P-1	YTD	Jul-18 vs Channel's Objective	YTD
RTL-TVI	PRP 18-54	↓ 77	↓ 91	↓ 83	↓ 95	× 111	× 109
Club-RTL	MEN 18-54	↑ 112	↘ 99	↑ 108	→ 100	✓ 78	× 114
Plug-RTL	ALL 15-34	↓ 52	↓ 74	↓ 58	↓ 80	× 176	× 125
La Une	PRP 18-54	↑ 153	↘ 101	↑ 164	↑ 106	× 105	× 110
La Deux	PRP 18-54	↑ 191	↑ 153	↑ 204	↑ 161	× 118	× 112
AB3	PRP 18-44	↓ 90	↓ 97	↓ 97	↑ 102	× 155	× 107
TF1	PRP 18-54	↓ 58	↓ 79	↓ 62	↓ 83	<i>Package</i>	<i>Package</i>
TTV	PRP 18-54	↓ 94	↓ 95				
TTV	PRP 18-44	↓ 94	↓ 95				
TTV	ALL 15-34	↓ 89	↓ 93				
TTV	MEN 18-54	↑ 104	↘ 99				

Time Shift Viewing & Other TV Screen Usage Evolution

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

Source: CIM TV - Live +6 including guests (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	32,4%	33,8%	32,4%	31,8%	98
Audience share TSU (%) (2)	Total channels (Live + TSV)	"	81,3%	81,5%	78,5%	75,9%	97
	VHS + DVD player + Blue Ray	"	7,6%	6,8%	7,2%	6,5%	91
	Video on demand + Digital recorder	"	9,9%	10,9%	13,6%	16,8%	124
	Game console and other devices (3)	"	1,2%	0,8%	0,7%	0,8%	108
% Time shift viewing (4)	All Channels	"	8,1%	12,3%	17,9%	20,1%	112
	Main Channels (5)	"	8,6%	13,1%	19,6%	20,6%	105
Commercial breaks rating vs full daypart rating Index	Main channels (5) - Live	"	90	88	89	83	
	Main channels (5) - TSV	"	42	52	51	50	
ATV (Average daily viewing time) in minutes	All TV channels (Live)	Total day	161	161	141	130	92
	All TV channels (TSV)	"	12	19	26	26	101
	All TV channels (Live + TSV)	"	173	180	167	156	94
	Other TV Screen Usage	"	48	50	53	59	111
	Total TV Screen Usage	"	221	230	220	215	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 - Jul-18

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

Rank	Website	Daily Unique Browsers	Rank	Website	Daily Unique Browsers
1	HLN.be	1.153.230	11	Gazet van Antwerpen	256.176
2	Nieuwsblad	960.129	12	Le Soir	217.278
3	2dehands.be-2ememain.be	506.592	13	Immoweb	183.198
4	Sporza	425.572	14	Het Belang van Limburg	179.685
5	RTBF.be	329.392	15	De Morgen	158.879
6	De Standaard	314.535	16	Knack-Le Vif	154.695
7	SudInfo	306.425	17	La Libre.be	129.836
8	RTL.be	283.258	18	7sur7.be	123.086
9	VRT	274.893	19	Buienradar	119.269
10	DH.be	260.570	20	L'Avenir.net	119.266

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



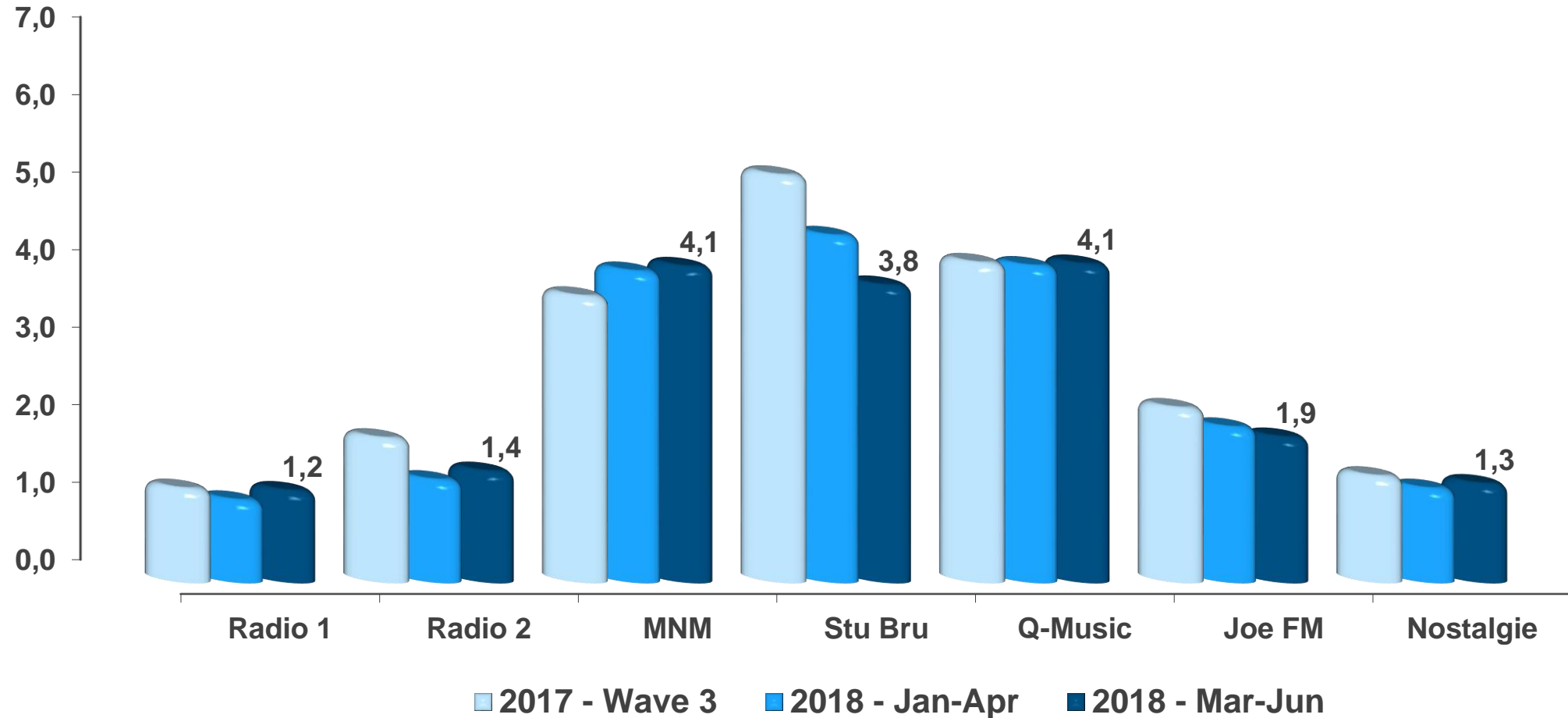
Key Radio Figures

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

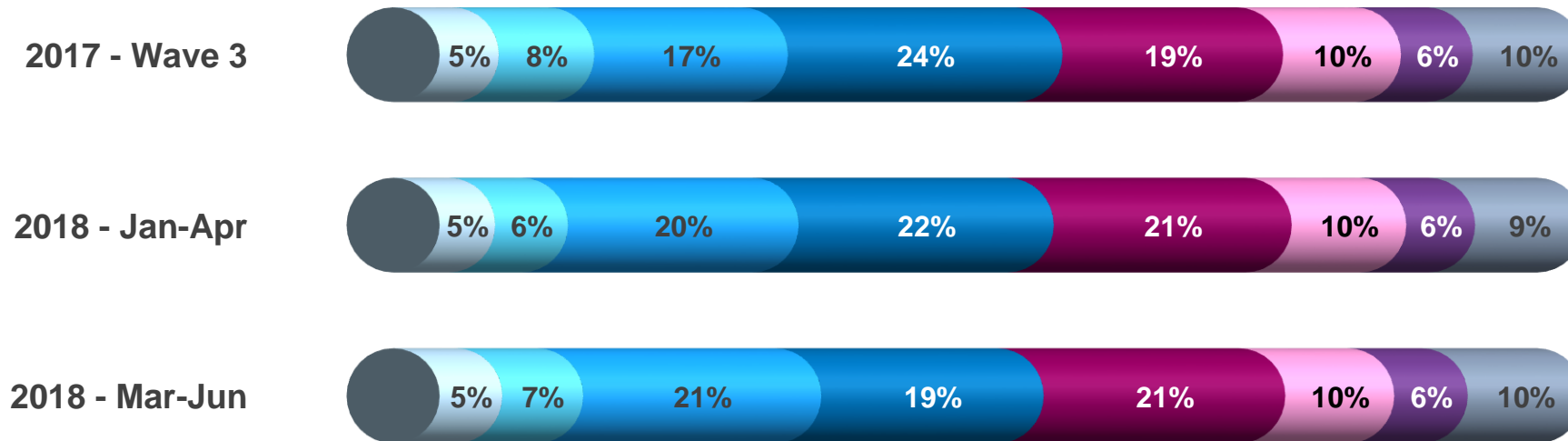


KEY RADIO FIGURES NORTH

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



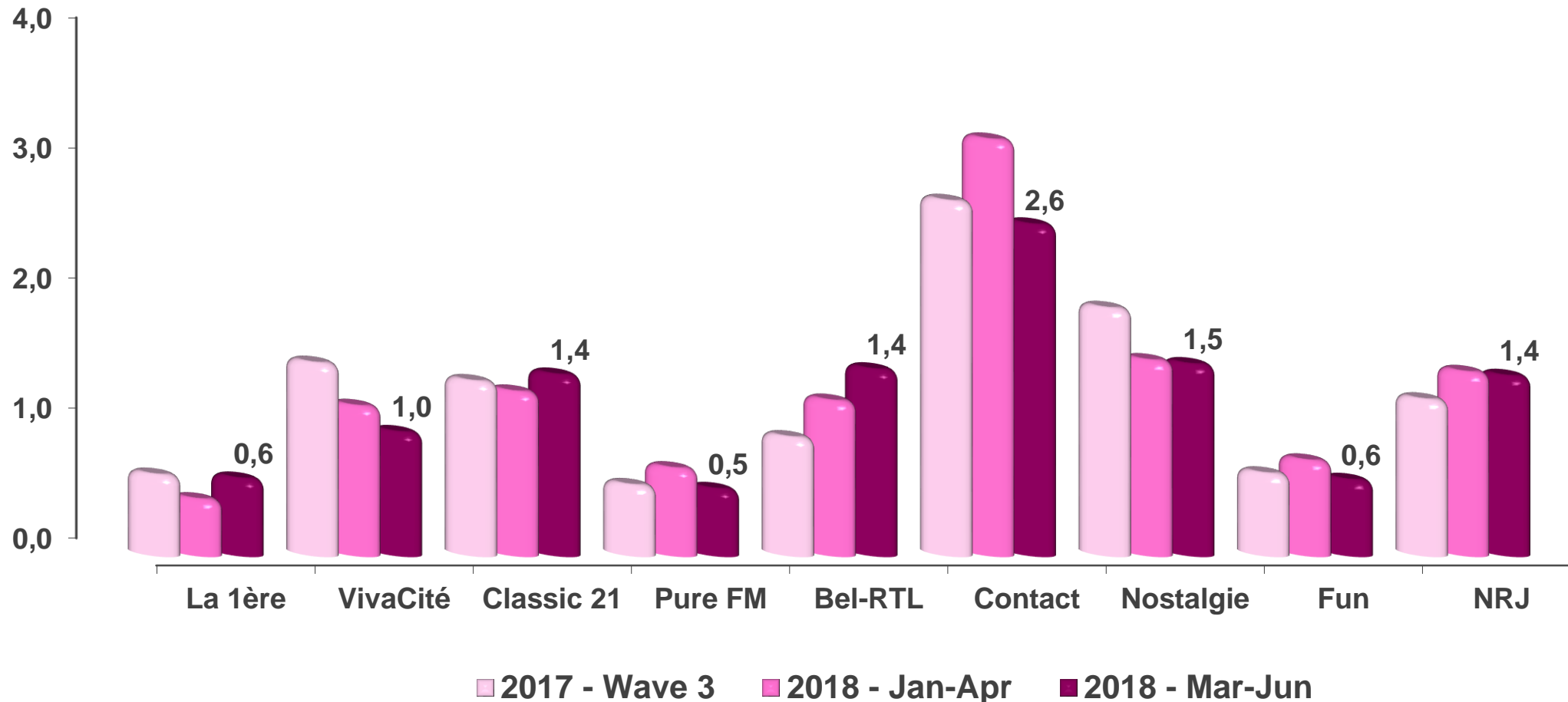
- Radio 1
- Radio 2
- MNM
- Stu Bru
- Q-Music
- Joe FM
- Nostalgie
- Other

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

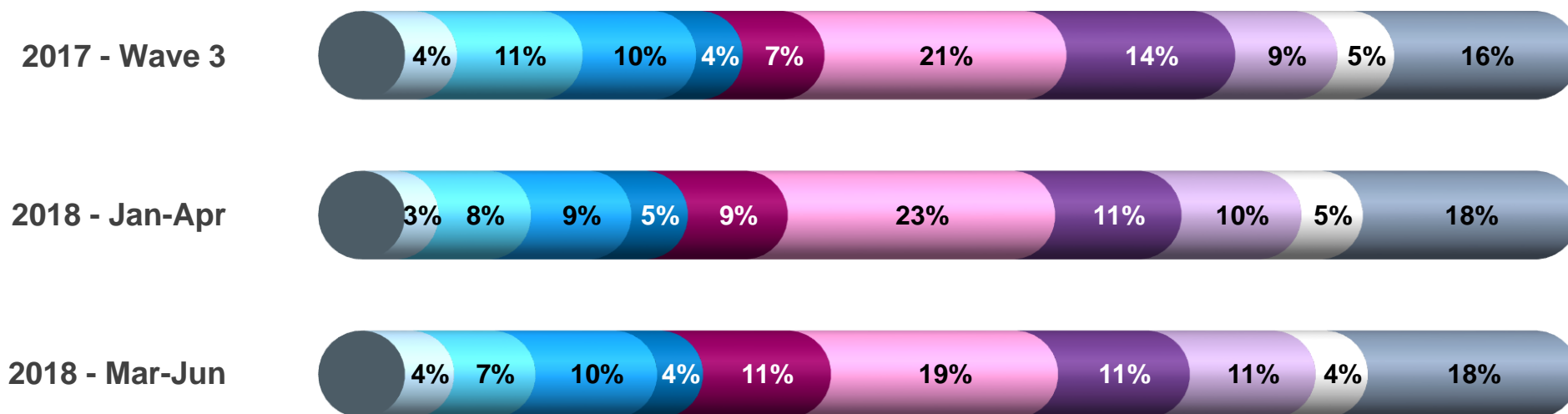


KEY RADIO FIGURES NORTH

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

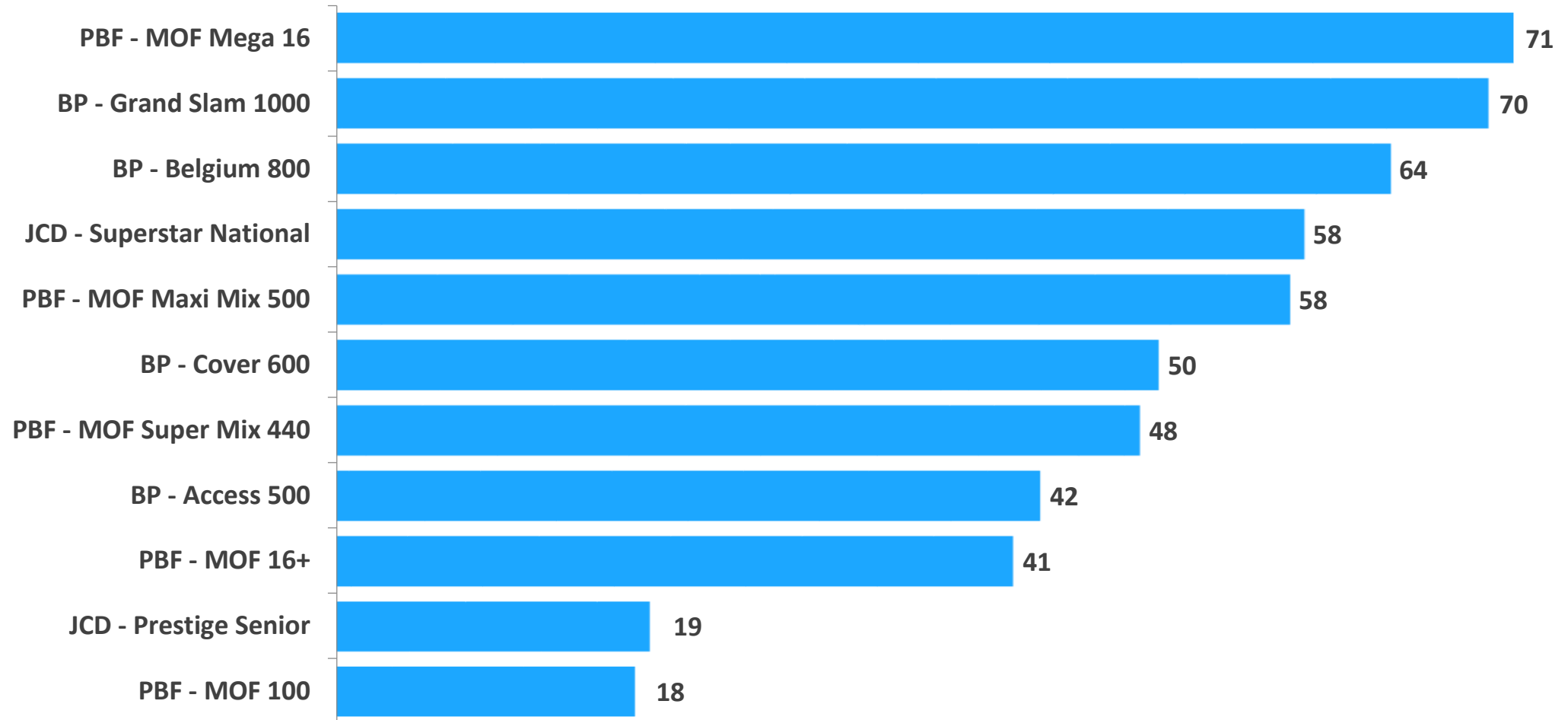


OOH ratings

Key OOH Figures - Panoramic & Classic billboards

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

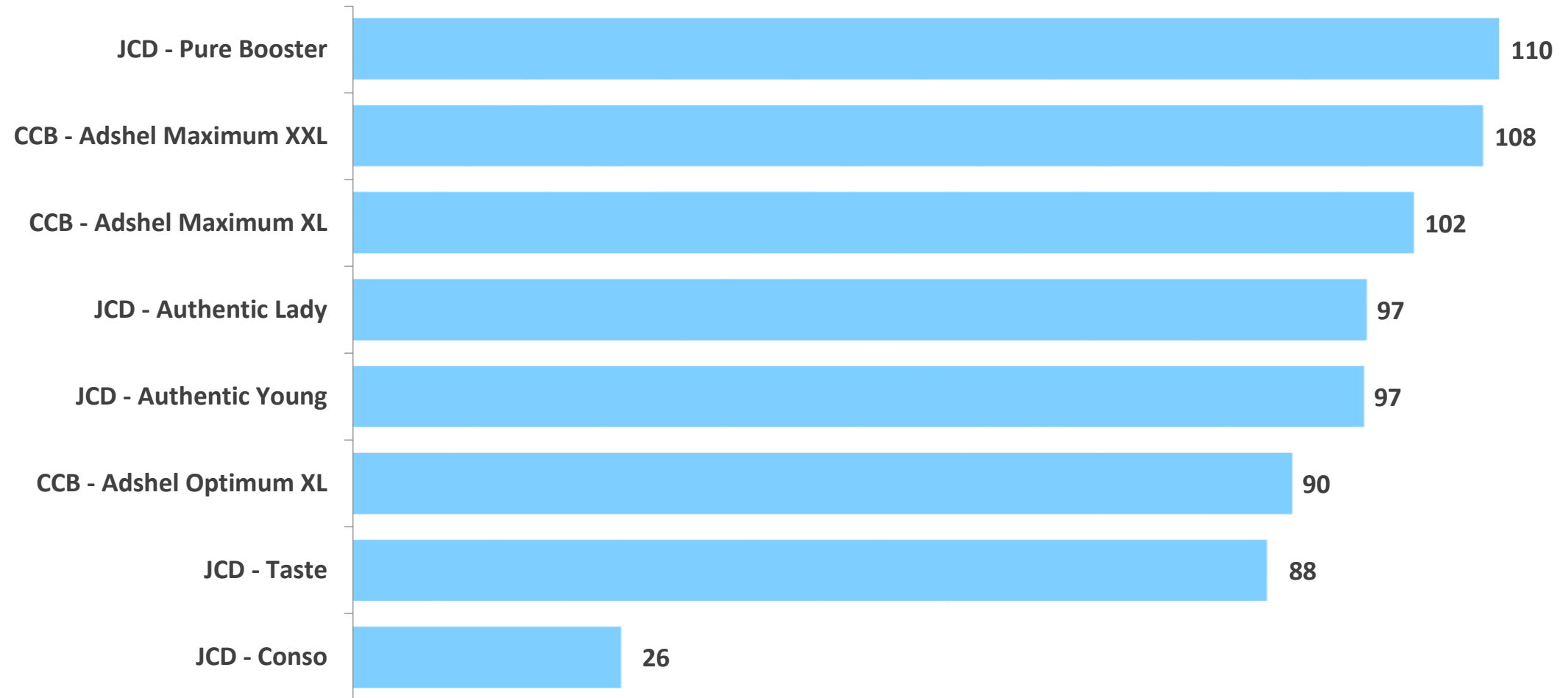
Source: CIM OOH 2017-01 / * : Visibility adjusted Rating Point



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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