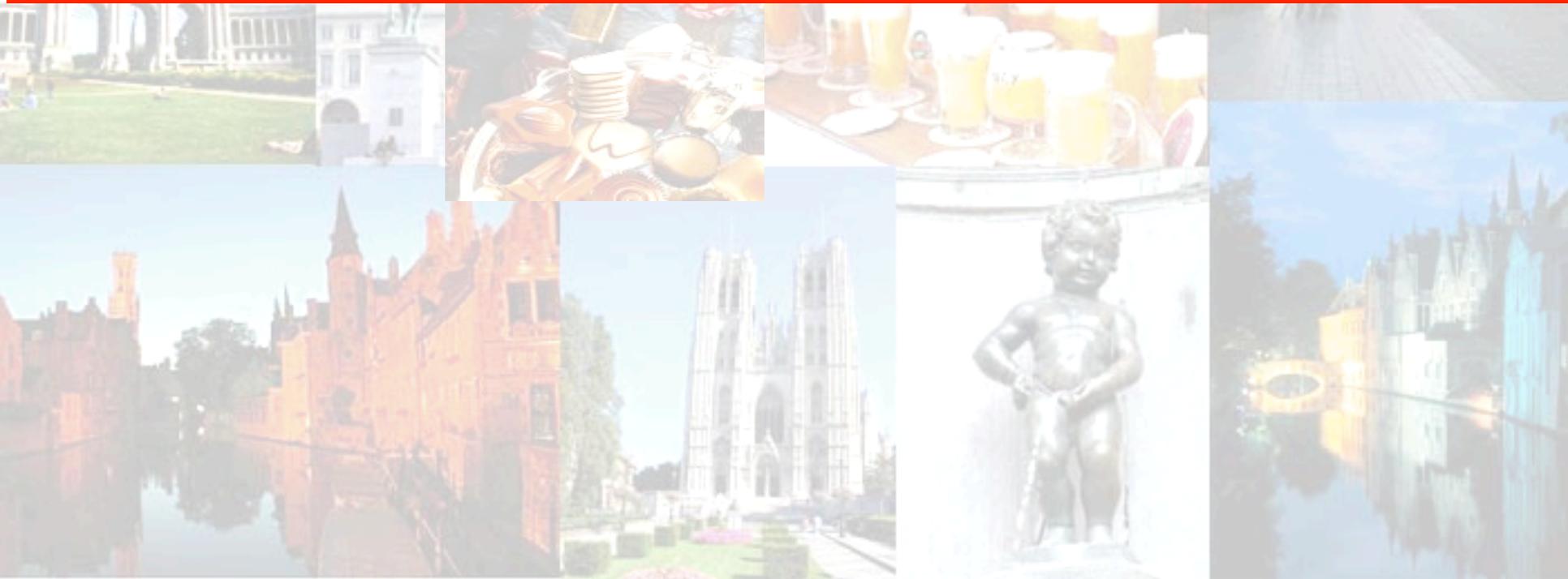


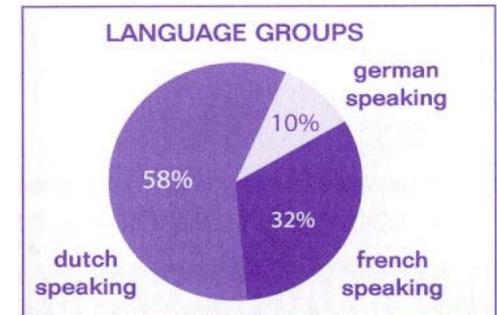
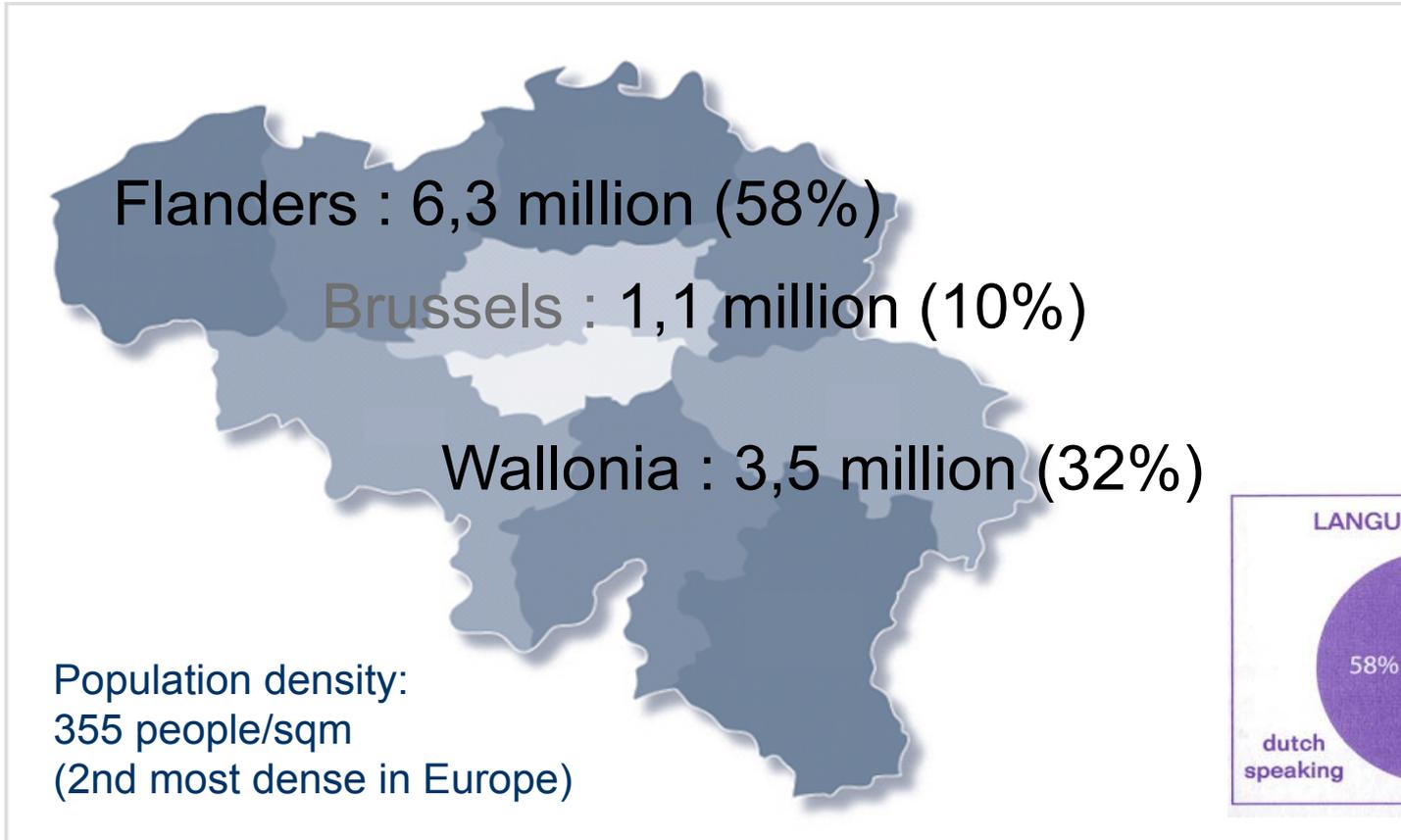


# Advertising in Belgium



# Belgium: regions & demographics

**Total Population: 11 million inhabitants**



# Belgium: strenghts & opportunities

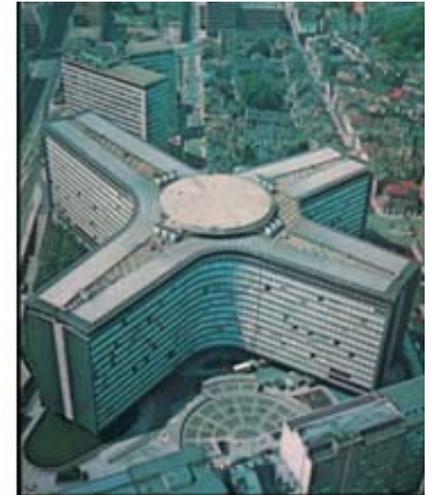
## Key economic & political position

Political and decision-making heart of Europe:  
home of most of the EU institutions.

Presence of international institutions : NATO,  
SHAPE,... (over 1700 ngo's or international  
organisations)

Large number of multinational company HQ's : P&G,  
3M, Toyota Europe, GSK, ...

Cosmopolitan character : mix of nationalities



# Belgium: strenghts & opportunities

## Socio-cultural position

- Multi-cultural society :  
mix of Latin and Germanic  
cultural roots & influences
- Habit to changing political  
regimes and cultural influences  
(in the past and today)
- Performant education system :  
High educational standards  
Learning multiple languages from an early age



# Print media in Belgium : newspapers



# Belgium : newspaper market

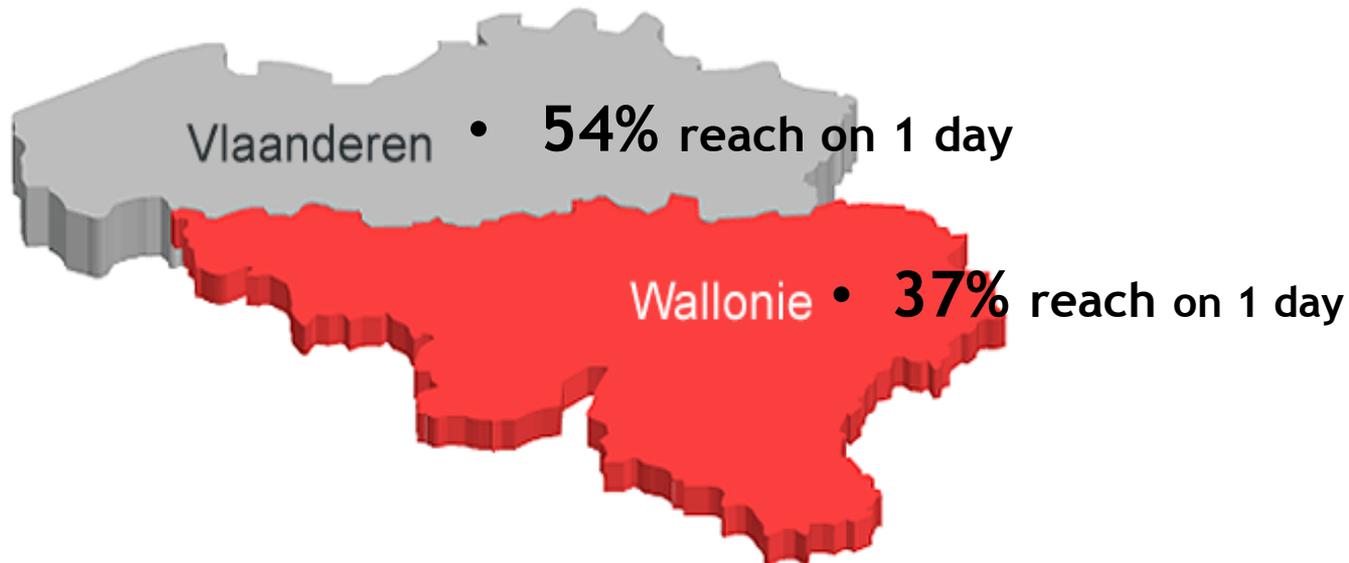


**1 BELGIAN ON 2 (population 12+)  
READS A NEWSPAPER ON DAILY BASIS**

**4.384.930 Belgians** read a newspaper every day

In Flanders average daily reach **2.897.000** readers

In Wallonia average daily reach **1.541.700** readers

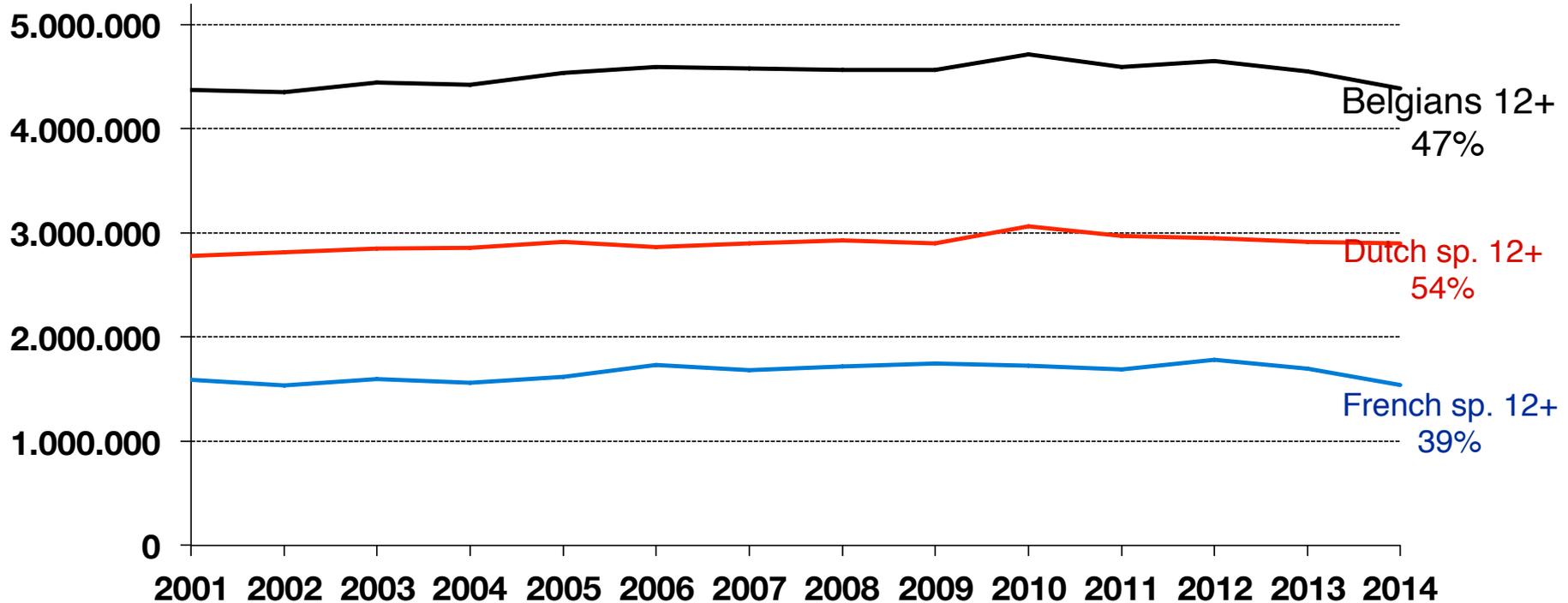


# Belgium : newspaper market

## Evolution daily newspaper readership



daily reach

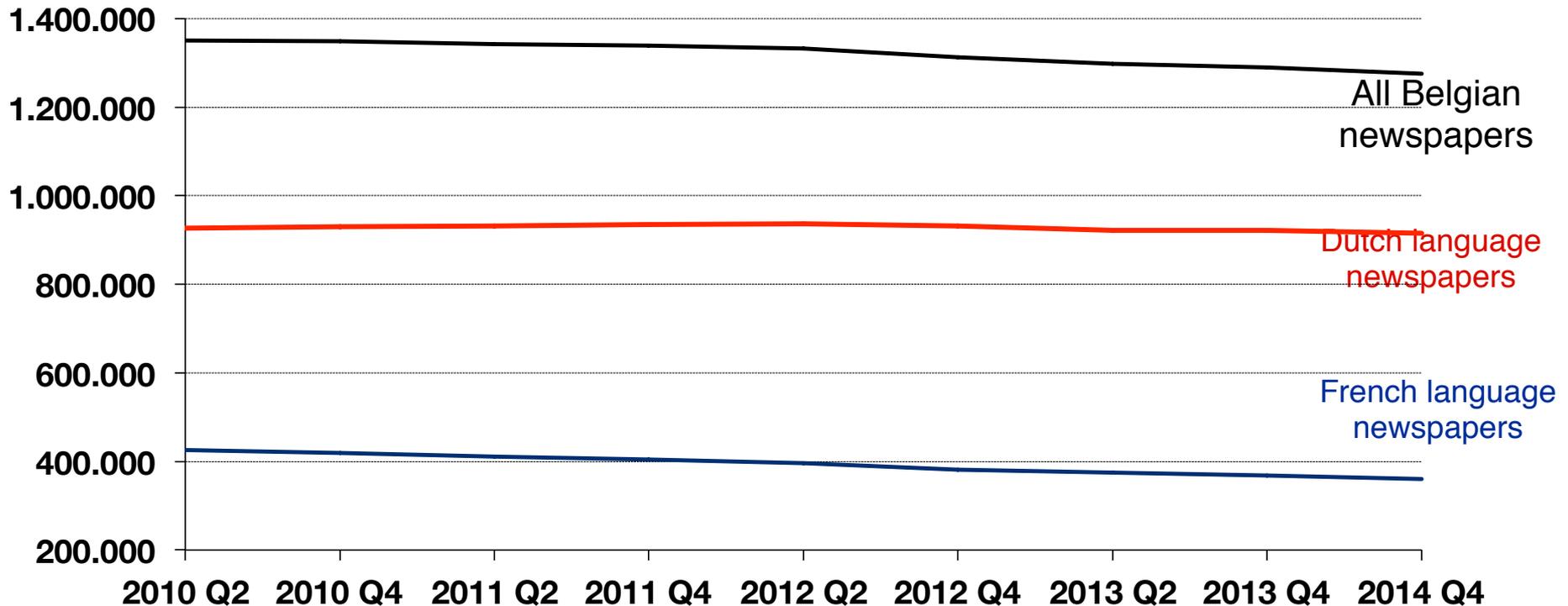


SOURCE: CIM Press 2000-2014 / Reach (RLP) paid newspapers (excl Metro) Print + Digital

# Belgium : newspaper market

## Evolution daily newspaper paid circulation

Daily circulation



SOURCE: CIM Press 2010-14 paid circulation newspapers Print + Digital

# Belgium : newspaper market



- **Belgians are still very attached to print :**  
93% prefers paper books, 86% prefers printed newspapers, 89% prefers printed magazines.  
Two thirds of those readers complete this print offer with digital media
- Penetration of digital versions of newspapers & magazines :  
47% with the Y-generation (under 35 y.)  
32% with the 55+ generation
- Situational choice :  
Home environment : 84% prefers printed version  
Work environment : 60% uses digital versions  
Other out of home environment : 36% chooses digital versions
- Type of information :  
Longer texts and books : preference for printed version  
Fast information that requires less concentration : via digital versions

Source : i-Vox march 2013 for Paper Chain Forum & Newspaperswork

# Belgium : newspaper market

Overview Flemish / Dutch language newspaper titles and publishers



Corelio MEDIA  
Concentra MEDIA

de Persgroep  
GROUPE ROSSEL

62%

38%

50%

50%



MEDIAHUIS



de Persgroep

mediafin

dS De Standaard

Het Nieuwsblad

GAZET VAN ANTWERPEN

HET BELANG VAN LIMBURG

DMorgen

HET LAATSTE NIEUWS

DE TIJD

# Belgium : newspaper market

## Overview French language newspaper titles and publishers



Corelio  
MEDIA



Tecteo  
GROUP

IPM  
Media Today

GROUPE  
ROSSEL

de Persgroep

GROUPE  
ROSSEL

50%



50%



mediafin

l'avenir

La Libre BELGIQUE  
LA DERNIERE HEURE  
LES SPORTS

LE SOIR  
sudpresse

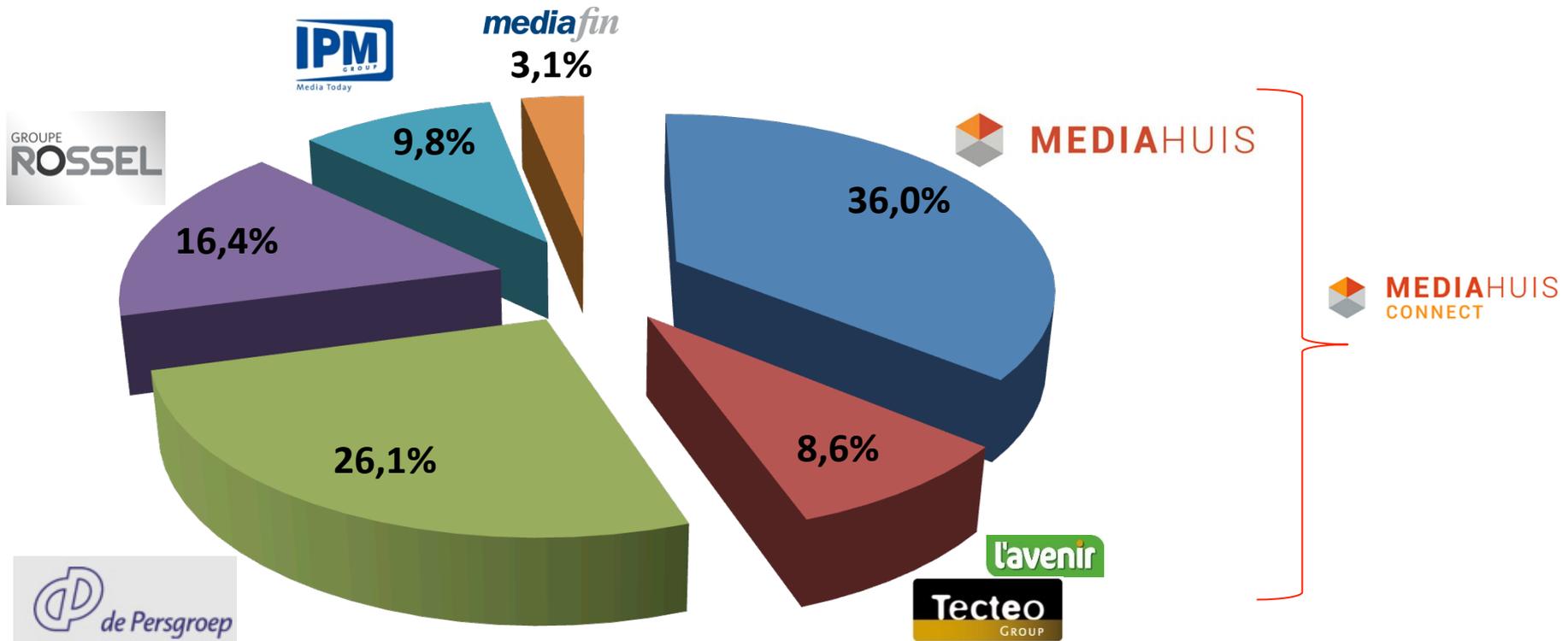
L'Echo

# Belgium : newspaper market



## Marketshare reach newspaper publishers

### CIM 2014 - REACH PAPER + DIGITAL



SOURCE: CIM sept 2014 / Shares based on Reach (RLP) paid newspapers (excl Metro)

# Belgium : newspaper market



## Dutch language newspapers

	Paid Circulation	RLP * 2014	SG1-3 2014	Readers per copy	Index reach vs paper only		Index week - Saturday	
					paper + digital versions	total brand = paper + dig. Version + web	index reach week	index reach Saturday
<b>Quality Press</b>								
De Standaard	100.786	367.700	76,4%	3,6	+17%	+75%	94,7%	123,0%
De Morgen	53.437	251.950	69,3%	4,7	+13%	+66%	92,1%	131,8%
De Tijd	40.223	119.800	80,5%	3,0	+14%	+75%	93,4%	109,9%
<b>Popular Press</b>								
Het Nieuwsblad	253.292	988.790	40,8%	3,9	+6%	+42%	97,7%	108,6%
Het Laatste Nieuws/NG	281.652	1.185.850	36,9%	4,2	+16%	+61%	98,1%	106,1%
Gazet Van Antwerpen	91.355	368.880	38,3%	4,0	+8%	+38%	97,0%	114,6%
Belang Van Limburg	94.360	379.230	37,1%	4,0	+5%	+25%	95,1%	119,8%
<b>Free Press</b>								
	(Free circulation)							
Metro Dutch language	103.231	375.710	57,0%	3,6	+1%	+1%		

\* RLP = readers last periodicity - source : CIM Sept 2014 Print + Digital versions

# Belgium : newspaper market



## French language newspapers

	Paid Circulation	RLP * 2014	SG1-3 2014	Readers per copy	Index reach vs paper only		Index week - Saturday	
					paper + digital versions	paper + dig. version + web	index reach week	index reach Saturday
<b>Quality Press</b>								
Le Soir	69.931	370.300	61,8%	5,3	+8%	+45%	99,5%	101,9%
Libre Belgique	36.978	163.220	69,6%	4,4	+6%	+44%	98,6%	106,0%
Echo	15.995	47.830	78,5%	3,0	N/A	N/A	N/A	N/A
<b>Popular Press</b>								
<b>l'Avenir</b>	<b>84.161</b>	<b>455.610</b>	<b>34,3%</b>	<b>5,4</b>	<b>+4%</b>	<b>+27%</b>	<b>99,3%</b>	<b>101,9%</b>
Sud Presse	96.585	547.560	30,2%	5,7	+3%	+22%	97,8%	104,4%
Dernière Heure	47.674	353.930	45,0%	7,4	+8%	+46%	97,7%	104,4%
<b>Free Press</b> (free circulation)								
Metro French language	96.227	465.250	48,6%	4,8	+1%	+2%		

\* RLP = Readers Last Periodicity - source : CIM 2014 Sept - print + digital versions



# Belgium : magazine market



## Readership last period

RLP-readers magazines	All readers	Dutch language readers	French language readers
Weeklies	7 458 700	4 478 000	3 114 500
Fortnightlies + Monthlies	5 597 300	3 126 800	2 007 100

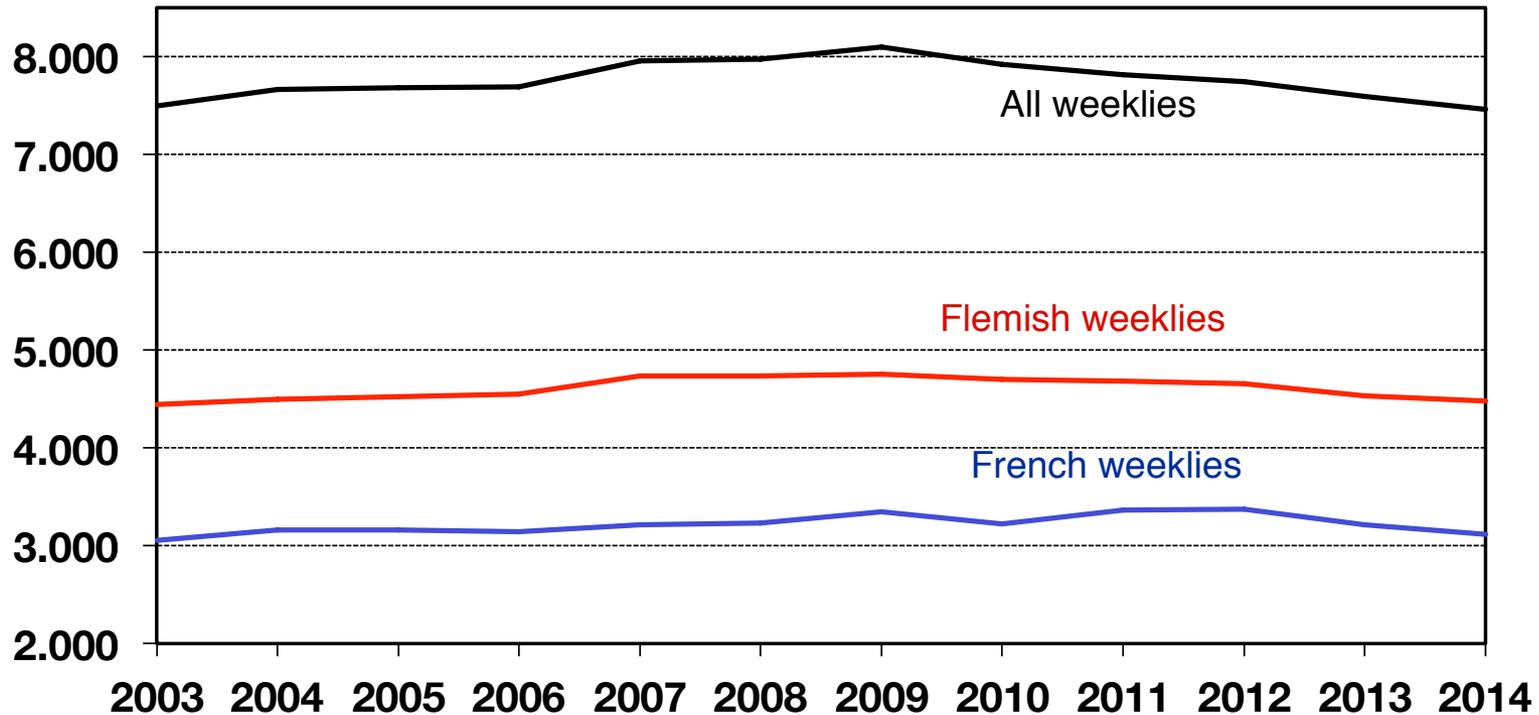
SOURCE: CIM Press 2014 Sept / Reach Magazines (RLP) Print + Digital versions

# Belgium : magazine market



## Evolution weeklies readership

Weeklies RLP reach in '000 readers

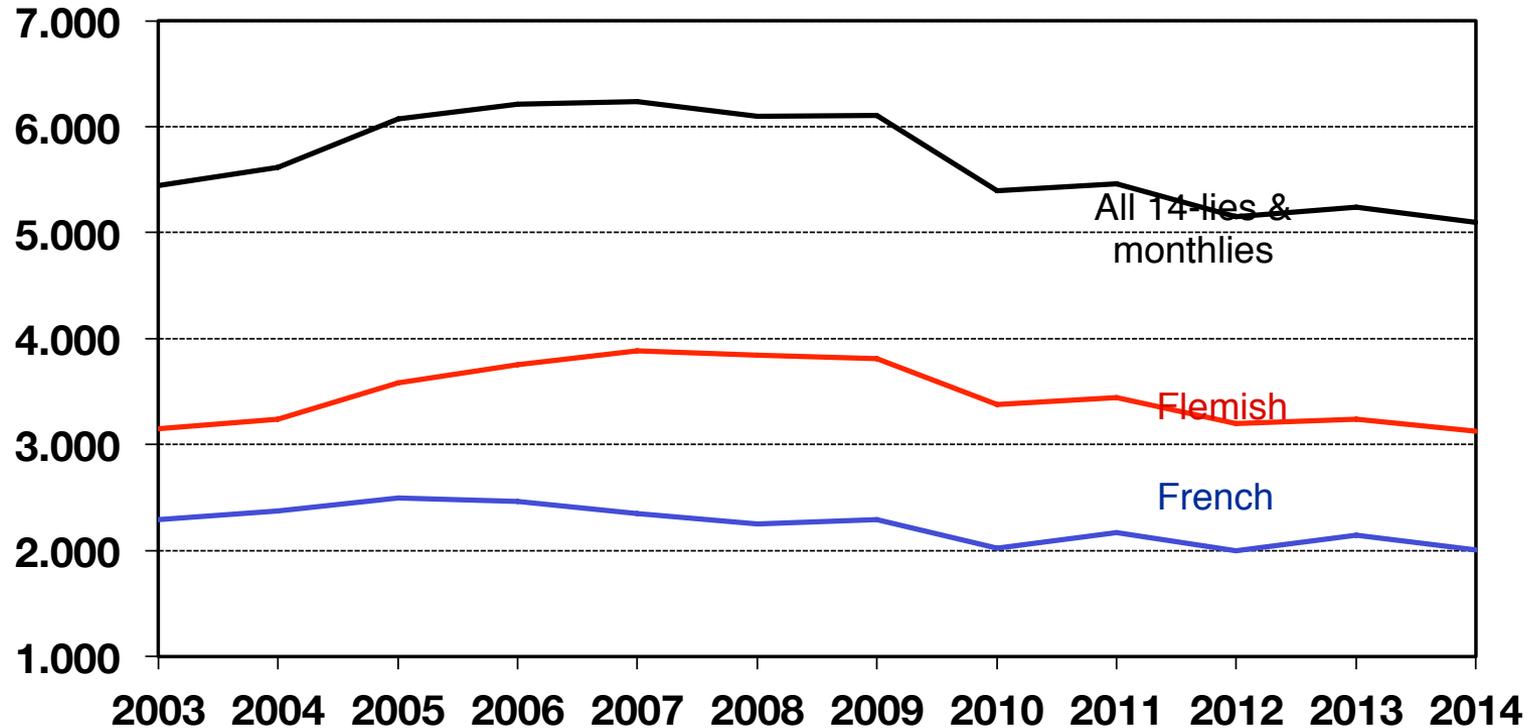


# Belgium : magazine market



## Evolution 14-lies + monthlies readership

RLP-reach 14-lies + monthlies in '000 readers



# Belgium : magazine market

## DEVELOPMENTS BELGIAN MAGAZINES & NEWSPAPER MAGAZINES



- Print media readers indicate that they have more time to read and therefore prefer to read magazines during the weekend
- During the week there is less and less time to read their magazine in a comfortable way

- The majority of Belgian (weekly) magazines, most of them issued on a week-day, have seen their circulation decreasing in the last years
- The only weekly magazines that **have increased their readership** in 2011-14, are **Saturday magazines** issued with quality newspapers



# Belgium : magazine market

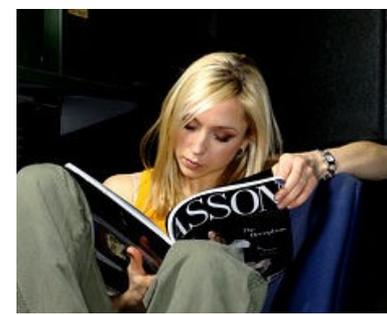
## NEWSPAPER MAGAZINES ARE RISING STARS

- Almost all newsbrand magazines of the have restyled their magazine to make them more appealing for both reader & advertisers.
- Structure & physical aspect of the newsbrand magazines has become close to the most successful lifestyle magazines on the market, even with the extra thick and glossy theme specials.
- De Standaard has doubled it's weekend magazine offer for the reader with the purpose to offer more and complementary news & lifestyle content



# Belgium : magazine market

## Flemish language weekly magazines



	Circulation 2014	Readership 2014	Magazine type
Dag Allemaal+Expres *	304.835	1.393.920	TV
Libelle	199.342	921.720	Women
HUMO	115.722	620.710	TV
Story	103.588	632.600	People
Nieuwsblad Magazine	265.542	574.660	Lifestyle
Flair NL	71.902	564.280	Women
Nina	308.376	533.310	Lifestyle
Knack	100.499	456.820	News
Nieuwsblad Fan!	265.542	371.690	Sports
Tv Familie+Blik *	76.240	355.740	TV
Weekend Knack	100.499	346.020	Lifestyle
De Standaard Magazine	110.954	345.130	Lifestyle
De Standaard Weekblad	110.380	312.310	News
TeVe-Blad	163.980	285.400	TV
Sjiek (BVL Magazine)	100.051	279.100	Lifestyle
De Morgen Magazine	70.038	256.650	Lifestyle
Focus Knack	100.499	246.100	Culture
P-magazine	29.225	245.700	Men
Primo/TV Gids *	115.059	241.900	TV
Joepie	31.133	230.500	Youth
Citta (GvA Magazine)	101.016	177.620	Lifestyle

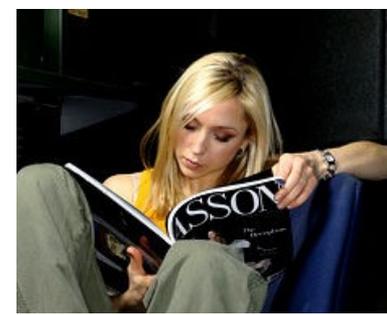
\*Compulsory combination

Het Nieuwsblad  
magazine

dS De Standaard MAGAZINE

# Belgium : magazine market

## French language weekly magazines



	Circulation 2014	Readership 2014	Magazine type
Ciné Télé Revue	241.134	1.317.200	TV
Femmes d'Aujourd'hui	85.070	506.000	Women
Télépro	113.388	407.300	TV
Vif L'Express	63.475	391.900	News
Paris Match	42.292	379.800	People
Soir Magazine	55.606	359.100	People
Télé Star	64.317	356.700	TV
Flair FR	30.383	329.500	Women
Télé Moustique	62.886	324.600	TV
Vif Weekend	63.475	220.300	Lifestyle
TV News	170.792	175.700	TV
Public	14.149	161.100	People
Point de Vue	26.259	148.600	Royalty
Victoire	72.184	143.700	Lifestyle
Focus Vif	63.475	135.700	Culture

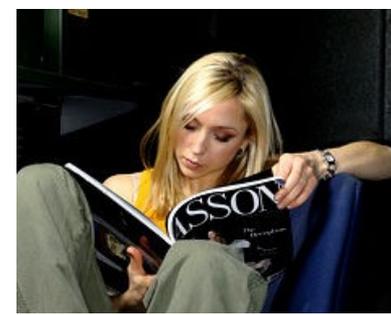
## Compulsory FR+FL weekly magazines

	Circulation 2014	Readership 2014	Magazine type
Sport Voetbal Magazine NL+FR	44.081	547.000	Sport
Trends NL+FR	43.377	233.400	News
Sabato NL+FR	60.819	97.200	Lifestyle

SOURCE: CIM Press 2014 Sept / Reach Magazines (RLP) Print + Digital versions

# Belgium : magazine market

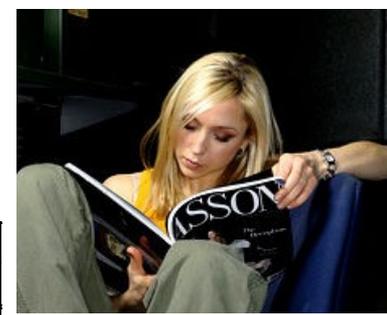
## Flemish language monthly & 14-ly magazines



	Circulation 2014	Readership 2014	Magazine type
UIT-Magazine (VAB)	298.794	487.400	Travel (members magazine)
Goed Gevoel	68.543	442.100	Health
Touring Explorer NL	181.739	347.800	Travel (members magazine)
Eos Magazine	25.619	290.100	Science
Feeling	53.572	258.900	Lifestyle / Women
Vitaya (Evita)	45.718	189.700	Women
Autogids	16.000	177.900	Cars
Autowereld	14.372	162.800	Cars
Vrouwen Met Vaart	99.595	160.200	Women
Elle België	18.014	139.900	Women / Fashion
Vrouw & Wereld / Femma	62.437	133.900	Women
Ché	14.359	128.200	Men
Pasar	32.292	119.500	Travel
Grande	5.438	102.000	Travel
Psychologies	6.319	90.100	Women/Health
Marie Claire NL	12.192	86.100	Women

# Belgium : magazine market

## French language monthly & 14-ly magazines



	Circulation 2014	Readership 2014	Magazine type
Top Santé	43.603	540.000	Women
Touring Explorer FR	205.607	384.200	Travel (members magazine)
Be TV	99.734	373.400	TV (members magazine)
Gael	23.335	241.400	Women
Marie Claire FR	14.225	193.100	Women
Elle Belgique	17.094	180.900	Women
Art et Décoration	4.923	174.300	Interior Design
Psychologies Magazine	10.359	168.600	Women
Elle Décoration	3.323	101.900	Interior Design
Parents	2.353	60.000	Family

## Compulsory FR+FL monthly & 14-ly magazines

	Circulation 2014	Readership 2014	Magazine type
Nest NL+FR (2-monthly)	85.716	500.500	Lifestyle
Plus Magazine NL+FR	100.928	348.300	Senior
Feeling Wonen + Gaël Maison	25.271	229.800	Interior Design
Actief Wonen + Déco Idées	24.303	194.800	Interior Design
Tu Bâtit, Je Rénove+Beter Bouwen en v	10.324	200.900	Construction
Ik Ga Bouwen+Je Vais Construire	14.883	202.800	Construction
Ambiance Culinaire FR+ NL	18.632	118.500	Gastronomy
Royals NL+FR	22.193	156.200	Royalty
Netto + Mon Argent	64.377	117.300	Finance

SOURCE: CIM Press 2014 / Reach Magazines (RLP) Print + Digital versions



# Belgium : internet market

# 81%

of all Belgians are online

EU: 65%, WE:81%, NE:87%, SE:61%, CEE:55%



Increased 17%  
since 2010



Belgian Internet users spend on  
average **13.6hrs online**  
per week

EU: 14.8, WE:14.0, NE:14.8, SE:13.8, CEE:16.1



Increased 5%  
since 2010



Source : IAB Mediascope Belgium

# Belgium : internet market



## Websites visited

### Top Websites used at least Daily

	Belgium	EU
Social media	36%	43%
News	37%	40%
Video	11%	18%
Banking and Finance	15%	16%
Hobby	9%	15%
Sports	7%	12%
Forums	7%	11%
Jobs	4%	11%
Music	5%	10%
Local information	5%	9%

### Top Websites used at least Monthly

	Belgium	EU
News	77%	78%
Social media	62%	70%
Video	64%	67%
Banking and Finance	75%	66%
Maps	61%	61%
Local information	49%	60%
Other Hobby	49%	58%
Films	37%	52%
Music	37%	52%
Price Comparison Sites	35%	49%

Source : IAB Mediascope Belgium

# Belgium : internet market

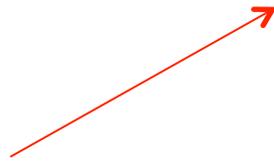
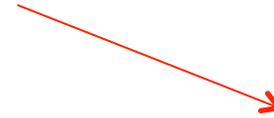


## Belgium

### Top 20 Sites in Belgium

Source: comScore MMX, December 2013

	Total Unique Visitors (000)	% Reach
<b>Total Internet : Total Audience</b>	<b>6,469</b>	<b>100.0</b>
1 Google Sites	6,197	95.8
2 Microsoft Sites	5,356	82.8
3 Facebook	4,726	73.1
4 Corelio Publishing	2,971	45.9
5 Yahoo Sites	2,438	37.7
6 Wikimedia Foundation Sites	2,375	36.7
7 VRT Sites	1,911	29.5
8 Belgacom Group	1,805	27.9
9 Axel Springer SE (Immoweb,...)	1,755	27.1
10 De Persgroep	1,672	25.9
11 Ask Network	1,615	25.0
12 Concentra Media	1,583	24.5
13 Amazon Sites	1,572	24.3
14 Apple Inc.	1,501	23.2
15 Groupe Rossel	1,447	22.4
16 CCM-Benchmark	1,423	22.0
17 eBay	1,376	21.3
18 2dehands	1,355	20.9
19 LinkedIn	1,333	20.6
20 BNP Paribas	1,304	20.2



**MEDIAHUIS**  
Publishing

# Belgium : internet market

## Ranking portals & news sites

Mediahuis news sites = top 10 sites

Website	UB's per month	UB's per week
HLN.be	10.708.338	3.635.188
Nieuwsblad Group	8.561.792	2.958.493
2dehands.be-2ememain.be	5.658.093	1.780.951
De_Standaard	4.302.831	1.426.155
Yellow_Pages	4.136.216	1.164.689
Knack-Levif	3.638.943	1.123.960
SUD PRESSE Groupe	3.583.834	1.242.414
Deredactie.be	3.454.845	1.085.033
Immoweb	3.240.041	999.482
Kapaza	3.032.009	958.347
She (gva+hbvl+nieuwsblad)	3.023.822	963.144
Sporza	2.964.149	973.972
Gazet_van_Antwerpen	2.855.730	943.981
RTBF.be	2.815.007	938.348
RTL.be	2.697.979	914.466
De_Morgen	2.677.456	866.976
DH.be	2.555.370	834.766
Skynet	2.531.833	742.197
VTM	2.273.422	668.359
Le_Soir	2.171.267	679.871
Lavenir Group	2.137.141	720.739
Sudinfo	2.051.446	691.221
7sur7.be	1.930.201	592.525
Het_Belang_van_Limburg	1.913.852	647.191
De_Tijd	1.627.144	495.308



Nieuwsblad.be

dS De  
Standaard  
ONLINE

GM.be  
GAZET VAN ANTWERPEN

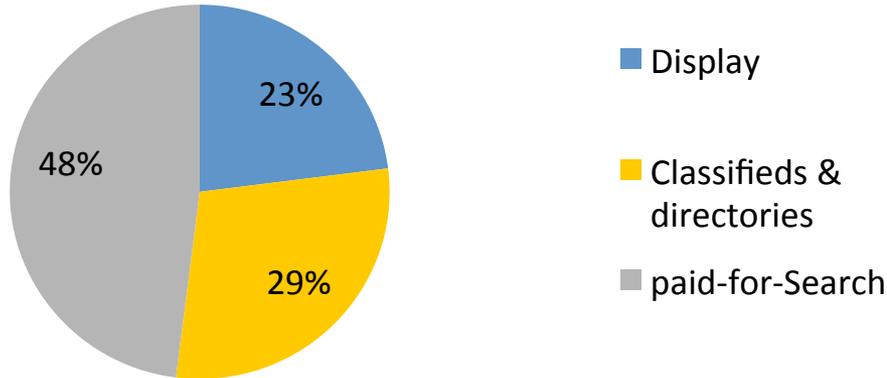
hbvl.be  
HET BELANG VAN LIMBURG

l'avenir.net

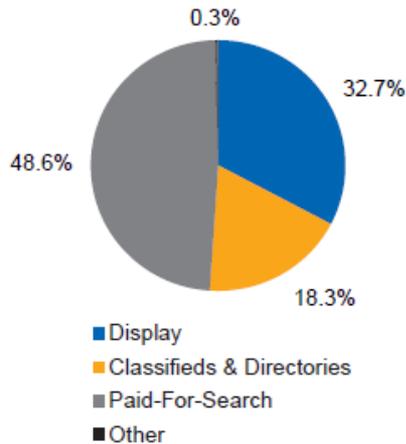
# Belgium : internet market



Belgium - Share of formats 2013

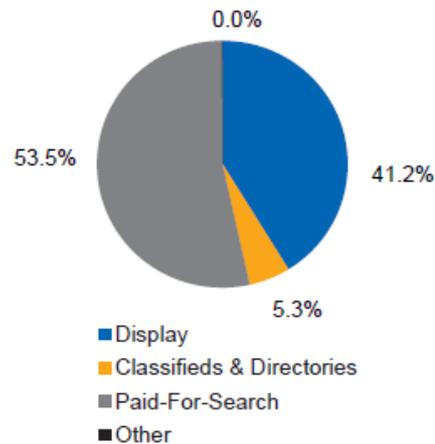


Western Europe:  
Share of formats in 2013



Source: IAB Europe/IHS

CEE:  
Share of formats in 2013

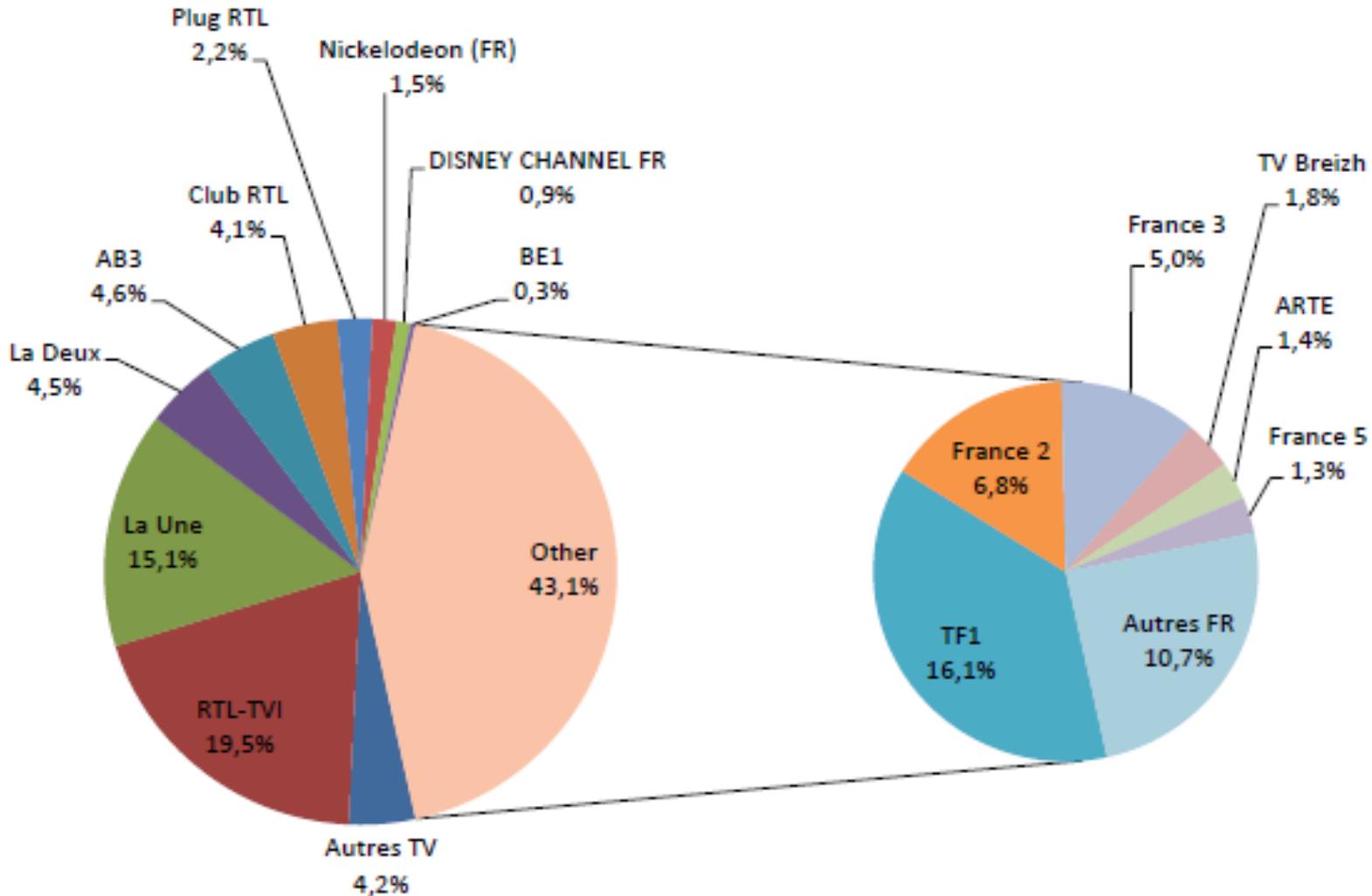


Source: IAB Europe/IHS

# TV media in Belgium

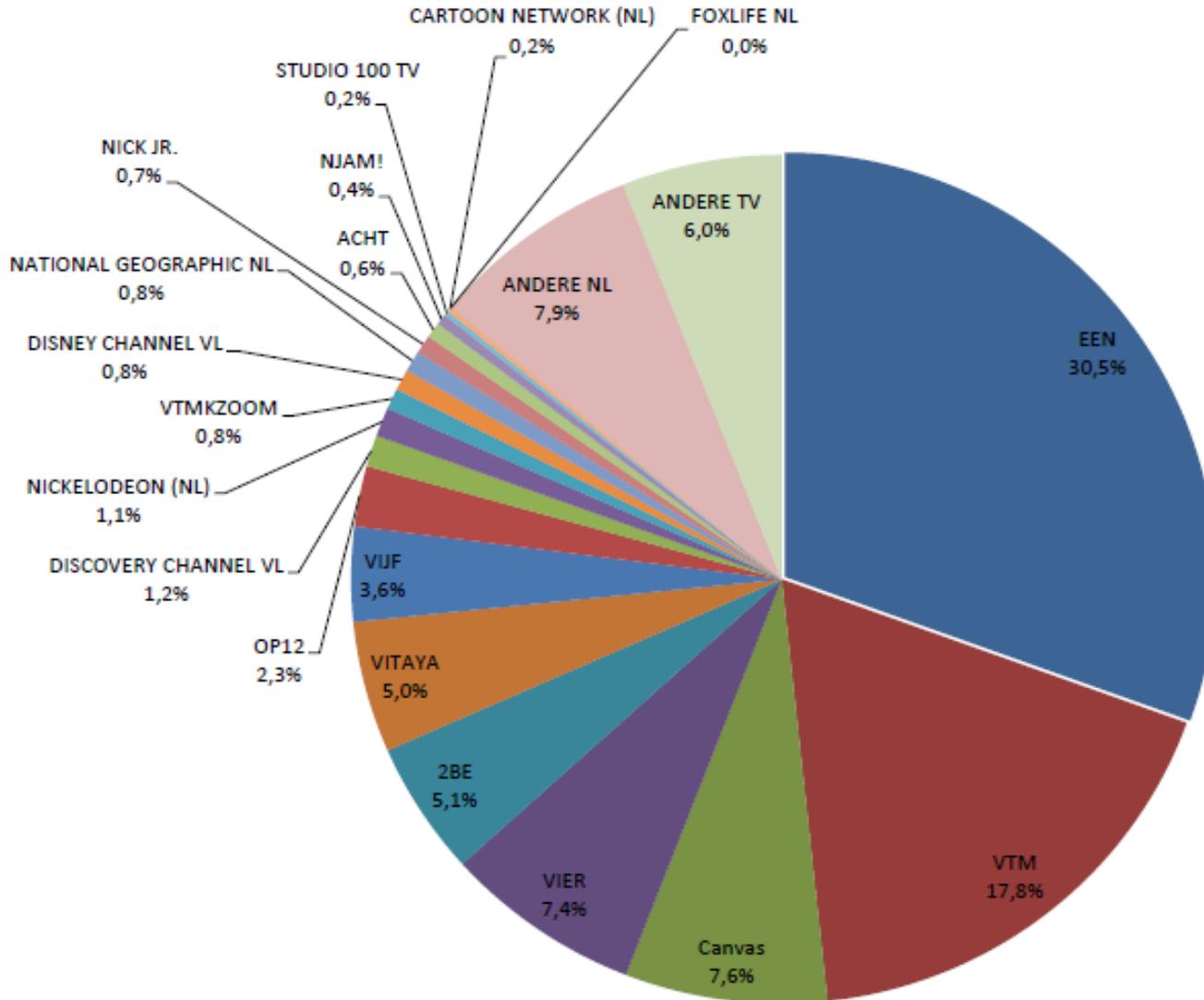
# Belgium : TV market

## Market share Wallonia 2013 – total population



# Belgium : TV market

## Market share Flanders 2013 – total population

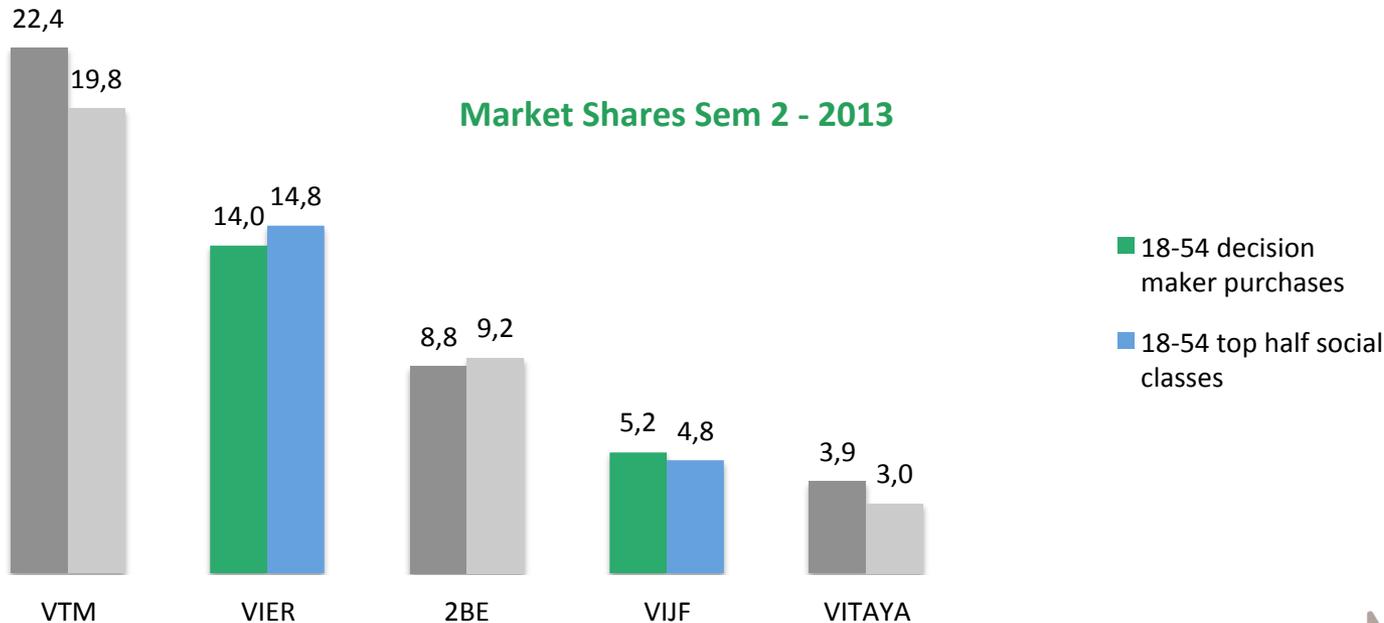


# Belgium : TV market



## 3 Challenging TV-channels

- **VIER** (Flanders – Generalist, Open Channel)
  - Upscale, Actives, strong challenger
- **VIJF** (Flanders – Female, Open Channel)
  - Female, Young,
- **Libelle TV** (Flanders – Digital Channel)
  - Spin off biggest female magazine Libelle, Women, all ages

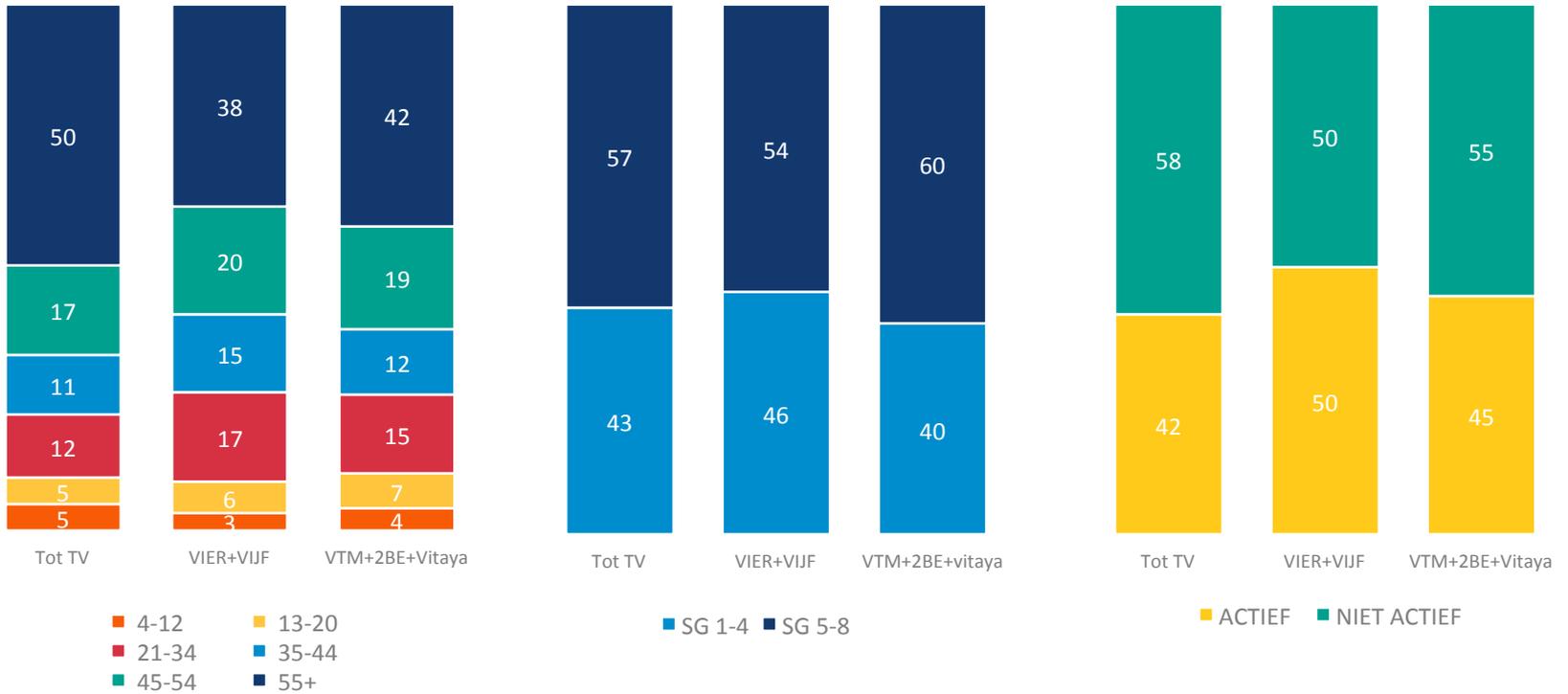


# Belgium : TV market

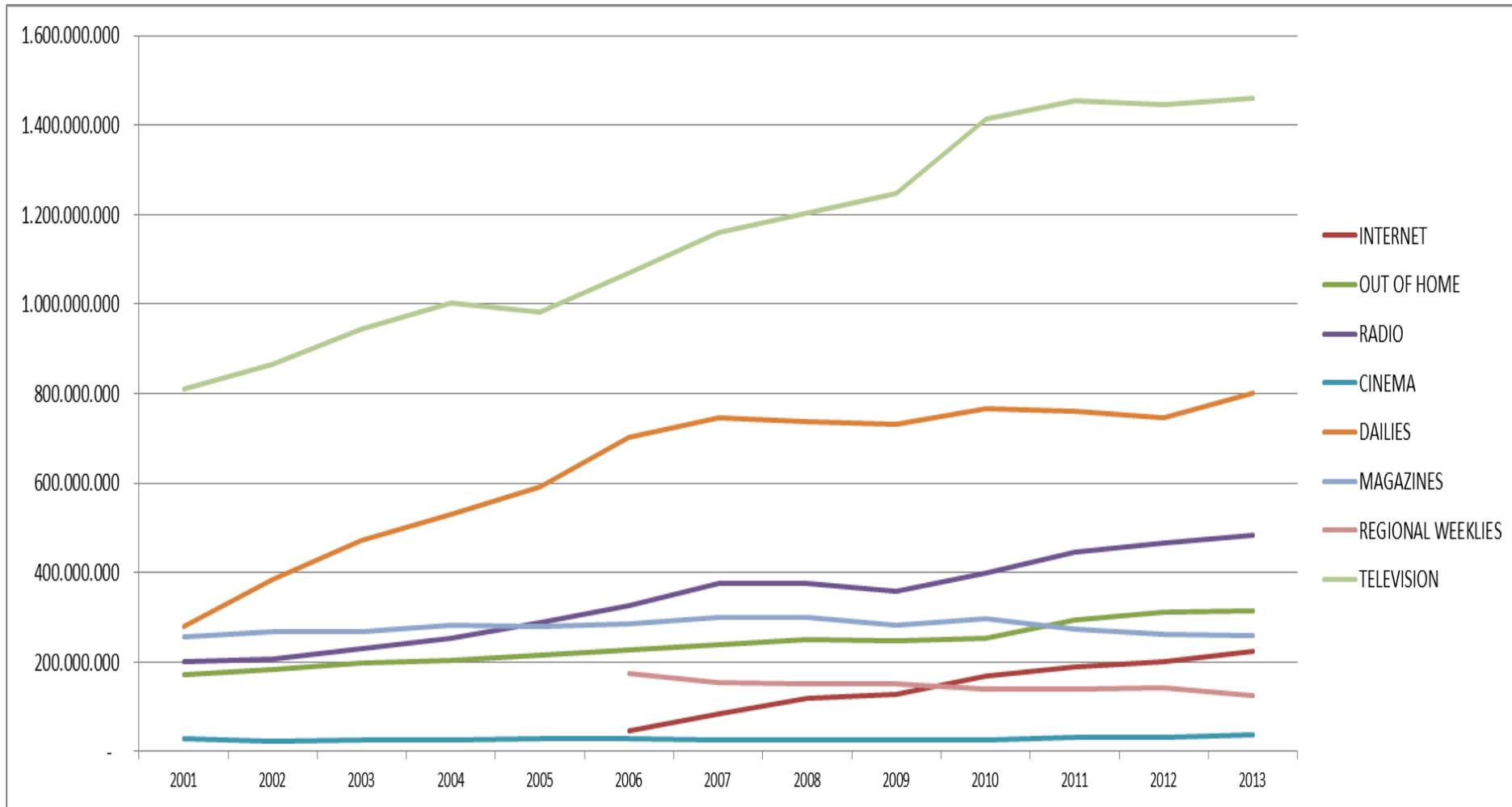


## PROFILE ANALYSIS

VIER – VIJF – Libelle TV

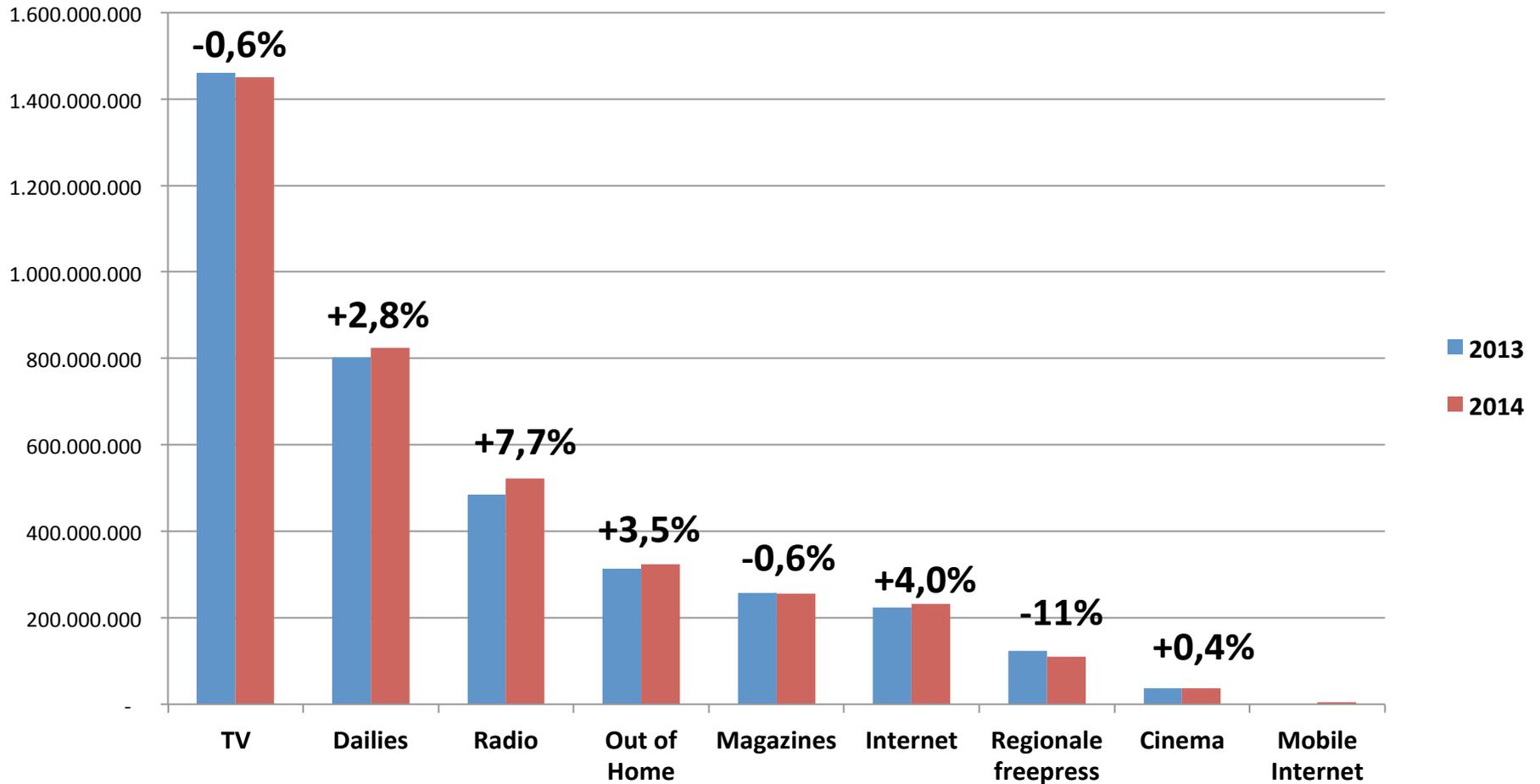


# Belgium : evolution media investments



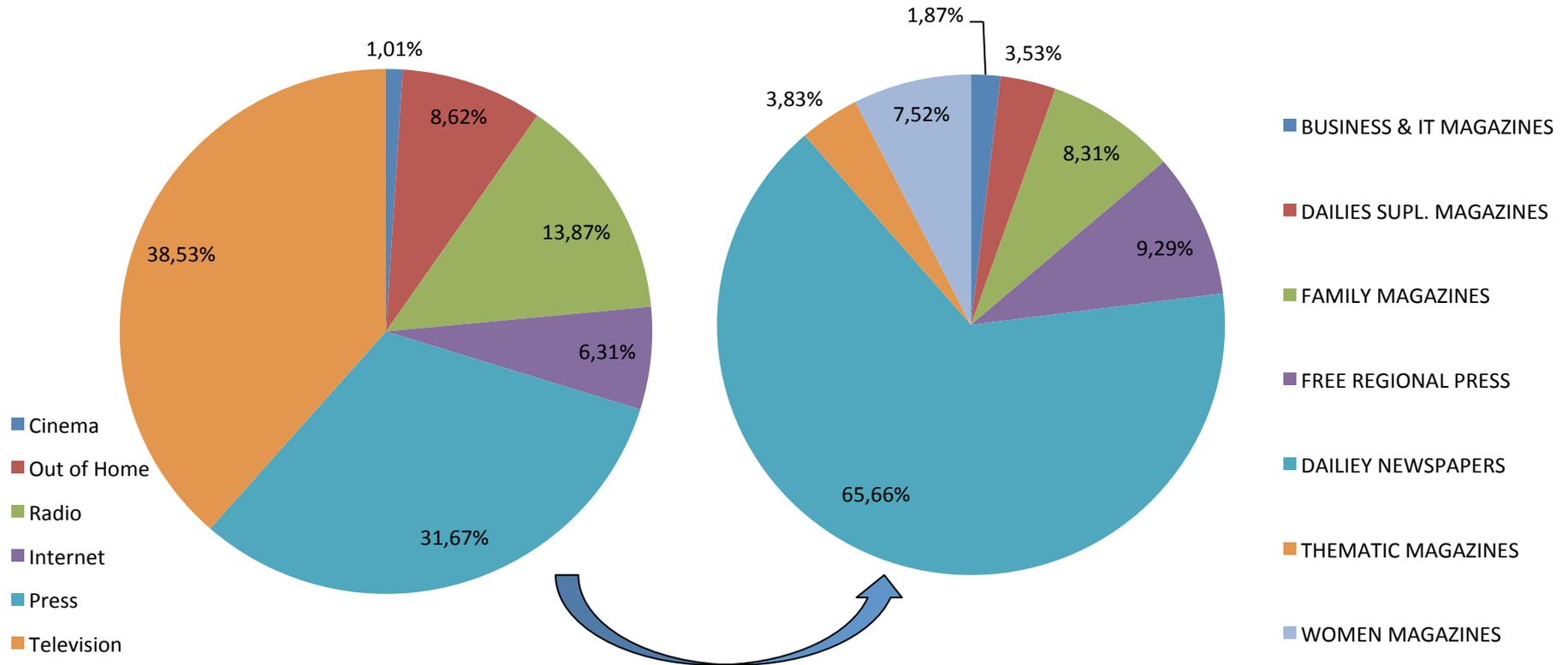
Source: MediaXim Bruto investments

# Belgium : evolution media investments



Source: MediaXim Gross investments 2014

# Belgium : evolution media investments



Source: MediaXim Gross investments 2014

# Belgium : evolution media investments

## Belgium : avid media consumers avid advertising consumers

7 out of 10 consumers believes that advertising promotes the growth of the economy.

They consider advertising as the crucial motor for a healthy competition amongst companies, which improves services and products and keeps the price level low.





MediaReps  
International Media Services

World Trade Center Almere  
P.J. Oudweg 4  
1314 CH Almere

T + 31(0)36 841 4880 M +31(0)6 524 33 721  
E [giovanni@mediareps.nl](mailto:giovanni@mediareps.nl) | [www.mediareps.nl](http://www.mediareps.nl)