CommPass

MATINEE CiM 2019

DIGITAL

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President of Technical Committee Internet

CommPass MATINEE CIM 2019

Nov 21st 2019

Digital study

Stephanie Radochitzki, President Technical Commission

Digital strategy & performance Director
IPG Mediabrands

Agenda

1
Methodology
& results
(reminder)

2
Evolutions

3
What's next

Foreword: a team's work

Control Traffic & audience data

Mission definition

Strategic commission	
Philippe Degueldre	**Pebble Media**
Sabrina Bakalli	RTL Belgium
Michaël Bassanello	Loterie Nationale
Jean-Michel Depasse	Mindshare
Sylvie Irzi	Mediabrands
Trui Lanckriet	Mediahuis
Sandrine Penninckx	Régie Media Belge
Stéphanie Radochtizki	Mediabrands
Sofie Rutgeerts	SBS Belgium
Tim Van Doorslaer	DPG Media
Philippe Van Helshoecht	Space
Anny Wuyts	VAR

Study design, methodo choice, follow-up, control

Technical commission	
Stéphanie Radochitzki	**Mediabrands**
Adrien de Walque	RTL Belgium
Nicolas Magain	Space
Mélanie Pierlot	Rossel & Cie
Sébastien Reps	Maxus
Bart Spiessens	Pebble Media
Bernd Strauven	DPG Media
Karel Verbrugge	Mediahuis
Frédéric Watelet	RTBF

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Methodology & results (reminder)

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Evolutions

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What's next

Methodology

Traffic measurement

Site centric

```
<script type="text/javascript">

<!--//--><![CDATA[//><!--

var pp_gemius_identifier = 'IDENTIFIER';

var pp_gemius_extraparameters = new Array('lan=EN', 'key=keyword',
'subs=subsection', 'free=free_field');

// lines below shouldn't be edited

(function(d,t) {try {var
gt=d.createElement(t),s=d.getElementsByTagName(t)[0],l='http'+((location.pr
otocol=='https:')?'s':'');
gt.setAttribute('async','async');gt.setAttribute('defer','defer');
gt.src=l+'://gabe.hit.gemius.pl/xgemius.js';
s.parentNode.insertBefore(gt,s);} catch (e) {}})(document,'script');

//--><!]]>

</script>
```

Audience measurement

User centric

General internet usage			
Q1	single	How often do you usually use internet?	1: 7 days a week 2: 5 or 6 days a week
Q1b		How many hours do you use internet in a typical day?	
Q1c	GRID (TABLE) QUESTION. One answer for each location.	How often do you generally internet on each of the follo places ?	

Basic socio-demographic variables			
Q9	single	What is your gender?	1. Male 2. Female
Q12	single	What is the highest level of education that you have reached successfully, either in day school or evening school?	1: primary school or no degree 2: lower general secondary education (first three years achieved) 3: lower secondary technical, artistic or professional education (first three years achieved) 4: higher general secondary education (last three years achieved) 5: higher secondary technical, artistic education (last three years achieved) 6: higher secondary professional education (last three years achieved) 7: candidate, bachelor (academic or professional), graduate 8: university license, master, post graduate, extra-university higher education (long type) 9: university license with met additional degree, master after master 10: doctorate with thesis

Methodology

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Traffic

GEMIUS

Counting
Browsers

Tags
Pages, players, apps
(Need publishers' cooperation)

Pages, visits, duration

Audience

Profiling
People

Questionnaire
Cookie panels fusion:
PC (home-work)
Tablet, Smart phone

Continuous recruitment
➔ 74 649 cookies (oct 2019)

Modelisation
+ weighting based on
Establishment survey
(used also for TV and radio)

Real users
Reach, OTS, GRP, affinity, surf time on socio-demo targets

Methodology: issues & solutions

- Cookie deletion and Multi-cookies : invite cookie of more than 7 days in cookie panel
- Multi-Browser : correction with J coefficient
- Multi-PC : Home/Work fusion + correction with dynamic J coefficient (J BRUS update in July 2018)
- Multi user : filtering out from the panel people who use less than 50% of the device's usage

➔ Real user algorithm

$$EB = PV * \frac{BID_{good}}{PV_{good}}$$

$$RU_{Site} = EB_{Site} * J_{Internet}$$

$$Reach_{Website} = \frac{EB_{Website}}{EB_{Total}}$$

$$RU_{Website} = Reach_{Website} * P_{CIM\ Websites}$$

$P_{CIM\ Websites}$ = population of Internet Users visiting this month at least 1 measured site.

- Apps tagging simplification: SDK
- 12-17 yo representativity : additional targeted recruitment

Results

Traffic data

- Scope of the study

  106 websites, 179 sections, 26 apps, 37 stream players (video, audio)

- Public results: daily

  (https://rating.gemius.com/be/tree/53)

2019-11-11 - 2019-11-17

Node	Page views	Visits	Avg. daily page views	Avg. daily visits
Internet	421 833 725	119 244 572	60 172 019	17 262 556
+ HLN.be	55 227 464	17 899 447	7 891 894	2 557 208
+ Nieuwsblad	30 334 646	11 390 880	4 335 672	1 627 866
+ Sudinfo	9 915 982	5 041 445	1 414 148	721 566
2dehands.be-2ememain.be	27 415 161	3 721 881	3 844 800	563 766
+ VRT	10 499 595	3 902 282	1 499 566	557 673
+ DH.be	8 693 498	3 684 514	1 242 275	531 366
+ RTL.be	7 231 031	3 555 666	1 033 899	510 536
+ RTBF.be	8 937 185	3 236 309	1 283 801	472 475
+ Sporza	8 155 665	2 981 207	1 165 905	426 397
+ De_Standaard	8 033 622	2 969 907	1 147 833	426 052
+ Le_Soir	5 040 019	2 602 698	721 967	378 267
+ Gazet_van_Antwerpen	6 301 763	2 507 265	900 254	360 348
+ Het_Belang_van_Limburg	5 374 254	2 074 838	767 828	298 744
Immoweb	15 991 705	2 009 998	2 277 013	297 440
+ De_Morgen	4 023 268	2 043 956	577 223	295 370

Results for subscribers

Traffic

Prism / Rating (https://prism.gemius.com/app/rating/reports/overview)

Daily update

2019-11-11 - 2019-11-17

Node	Real users	Stream views	Streaming time
Stream Media Groups	2 996 284	19 321 141	210y 132d
+ Total	2 996 284	19 321 141	210y 132d
+ Video	2 954 785	19 077 930	159y 267d
+ Audio	82 650	243 211	50y 230d

Results for subscribers
Audience analysis

Gfk Probe

Weekly update

October 2019

Device	Base target group	Target group	Facts
All platforms			
Total			
VVA 18-44 (NL)			

Titles	Net reach#	Net reach%	Views	Visits	Surf time reached cume	Index views
HLN.be	1,012,076	81.7	74,993,900	23,326,220	1:59:36	241.6
Nieuwsblad	891,780	72.0	35,306,577	13,460,703	0:47:15	210.2
VRT	612,872	49.5	16,257,137	5,866,847	1:42:23	276.0
De Standaard	543,646	43.9	11,476,168	4,362,890	0:26:01	230.3
Flair	481,877	38.9	3,076,283	2,266,529	0:08:22	307.6
Een	469,989	38.0	3,150,618	1,833,022	0:15:00	305.0
Gazet van Antwerpen	469,285	37.9	8,505,593	3,760,948	0:13:17	226.3
Immoweb	460,125	37.2	18,217,396	2,954,507	0:31:29	182.8
De Morgen	454,484	36.7	4,952,396	2,420,898	0:16:27	238.7
Libelle/Femmes_dAujourdhui	442,000	35.7	2,998,694	1,691,926	0:10:32	282.4
2dehands.be/2ememain.be	432,806	35.0	22,474,307	3,281,956	0:47:23	153.9
Vier	386,809	31.2	3,746,719	1,372,795	0:30:11	232.8
Sporza	361,332	29.2	14,370,508	4,796,362	1:01:45	247.2
Radio 2	358,506	29.0	1,147,591	902,259	0:03:49	209.0
VTM	347,530	28.1	1,757,462	951,776	0:09:39	252.8

Results for subscribers
Audience analysis

	Website	Reach in %	Affinity index	Surf time (monthly)
1	HLN.be	46%	165.8	02:10:44
2	Nieuwsblad	44%	219	01:26:20
3	De Standaard	32%	283.1	00:56:21
4	VRT	30%	271.1	03:03:42
5	2dehands.be/2ememain.be	29%	131.3	00:55:01
6	Knack/Levif	27%	186.4	00:11:27
7	Sporza	26%	271.1	01:08:21
8	Le Soir	24%	237	00:36:16
9	DH.be	24%	338	01:14:52
10	RTBF.be	24%	176.2	01:35:46
11	Gazet van Antwerpen	23%	152.6	00:27:42
12	De Morgen	22%	234	00:25:10
13	Immoweb	21%	73.2	00:28:50
14	Sudinfo	20%	69.4	00:16:46
15	De Tijd	19%	278.7	00:53:12
16	RTL.be	17%	115.8	00:26:43
17	Yellow Pages	15%	108.2	00:11:44
18	L'Avenir.net	15%	117.4	00:08:49
19	Autoscout24	15%	172.5	01:18:38
20	Sudpresse Editions Digitales	15%	122.6	00:08:40

Results for subscribers
Audience analysis

	Website	Reach in %	Affinity index	Surf time (monthly)
1	HLN.be	43%	74.4	01:00:02
2	Flair	39%	363.1	00:08:53
3	Nieuwsblad	36%	57.1	00:23:54
4	Immoweb	33%	201	00:39:29
5	Libelle/Femmes_dAujourdhui	29%	210.9	00:08:38
6	DH.be	28%	35.2	00:09:18
7	RTL.be	28%	117.5	00:17:36
8	Sudinfo	27%	107.1	00:18:00
9	RTBF.be	27%	47.5	00:40:15
10	2dehands.be/2ememain.be	25%	62.8	00:26:57
11	VRT	25%	75.5	01:17:26
12	Le Soir	23%	74.9	00:09:31
13	Een	21%	165.2	00:13:53
14	Gazet van Antwerpen	20%	87.5	00:08:57
15	L'Avenir.net	20%	94.9	00:05:57
16	VTM	19%	207.2	00:11:15
17	Vier	19%	209.3	00:44:46
18	De Standaard	18%	64.8	00:20:02
19	De Morgen	17%	95.6	00:13:13
20	Knack/Levif	16%	82.3	00:06:39

Results for subscribers
Planning

Scenario 1

Total-> FR Reference period: October 2019 Titles	Volume	% Volume	Impressions Base	Impressions Tgt	Targeting Target	Reach%	Reach#	OTS	Freq Cap	Static	Budget	Budget%	CPM net	GRP	C/GRP
Video| IP Belgium	4,487,210	20.0	897,442	897,442	FR	11.9	505,984	1.8	0	☑	32,308	35.9	36.00	21.0	1,536.2
Video| RMB (partial)	8,465,425	20.0	1,693,085	1,693,085	FR	13.7	584,368	2.9	0	☑	57,565	64.1	34.00	39.7	1,450.9
DPG Media Stream	72,260,541	0.0	0	0		0.0	0	0.0	0	☐	0	0.0	26.00	0.0	0.00
SBS Belgium Stream	6,555,908	0.0	0	0		0.0	0	0.0	0	☐	0	0.0	33.00	0.0	0.00
# TOTAL PLAN #			2,590,527	2,590,527		22.4	954,948	2.7		☐	89,873			60.7	1,480.4

Total-> NL Reference period: October 2019 Titles	Volume	% Volume	Impressions Base	Impressions Tgt	Targeting Target	Reach%	Reach#	OTS	Freq Cap	Static	Budget	Budget%	CPM net	GRP	C/GRP
Video| IP Belgium	4,526,887	0.0	0	0		0.0	0	0.0	0	☐	0	0.0	36.00	0.0	0.00
Video| RMB (partial)	8,521,799	0.0	0	0		0.0	0	0.0	0	☐	0	0.0	34.00	0.0	0.00
DPG Media Stream	72,260,541	20.0	14,452,108	13,967,088		41.0	2,260,81	6.2	0	☐	375,755	89.7	26.00	253.5	1,482.13
SBS Belgium Stream	6,555,908	20.0	1,311,182	1,116,198		11.5	634,805	1.8	0	☐	43,269	10.3	33.00	20.3	2,135.62
# TOTAL PLAN #			15,763,290	15,083,286		44.6	2,458,38	6.1		☐	419,024			273.8	1,530.49

Info from
external rate cards

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Methodology & results (reminder)

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What's next

OVC daily publication

Communiqué de presse CIM

Publication des volumes de vision en ligne des programmes TV
à partir du 2 septembre 2019

Le CIM publie chaque jour combien de personnes en Belgique ont regardé le jour avant un programme en direct ou en différé sur l'écran de TV classique. Le CIM publie également chaque jour combien de surfeurs ont regardé le jour avant des vidéos en ligne de nos chaînes belges, mais sans détail sur le contenu de ces vidéos. Le CIM ajoutera très bientôt, dans leur **Total Video Project**, le chaînon manquant entre les deux mesures.

A partir du 2 septembre 2019, le CIM rapportera également, à côté des chiffres de vision TV classiques, le nombre de Vues et la Durée de vision des programmes TV qui sont regardés en ligne après émission (sur demande). Cela permet au marché de compléter le rating TV classique avec le rating de la vision en différé des programmes TV en ligne.

Méthode

Les vidéos en ligne sont déjà mesurés depuis quelques années par Gemius dans l'étude CIM Internet.

Depuis peu, les broadcasters intègrent, dans leurs applications vidéo, un code d'identification qui permet d'identifier le contenu de ces vidéos en ligne.
De cette manière, il est possible de faire le lien entre les vidéos en ligne et les programmes diffusés de façon linéaire comme rapportés dans l'étude CIM TV.

Reporting

En plus des vues en ligne et le temps de vision, le web rating par programme est publié. Il est calculé de la même manière que pour la TV classique, à savoir le temps de vision total divisé par la durée du programme.

Les logiciels TV de Nielsen, GfK et Kantar TNS sont certifiés pour la publication de ces nouvelles données.

Nielsen Online Video Content Band B Dashboard

Source: CIM; TV ratings are based on 4+ plus guests
Copyright © 2019 The Nielsen Company

North South | Networks Stations Episodes

Filter by Repeat: No | 0. All Day | Consolidated (last available)

DPG Media SBS VRT

Episodes by Program

VTM | NIEUWS 19U VTM | Repeat: No | 0. All Day | Consolidated (last available)

Last Updated: Mon 18 Nov 2019 @ 14:08

					RAT	RAT %	TTVSHR %	Web RAT	Stream Views	Hours Viewed
2019.11	17/11/2019	VTM NIEUWS 19u - 17/11/2019	18:59:57	19:45:55	610.129	10,09	29,44	499	1.128	382,4
	16/11/2019	VTM NIEUWS 19u - 16/11/2019	20:25:32	21:01:15	584.227	9,66	24,61	751	1.887	447
	15/11/2019	VTM NIEUWS 19u - 15/11/2019	18:59:52	19:51:06	574.269	9,5	29,45	810	2.009	692,2
	14/11/2019	VTM NIEUWS 19u - 14/11/2019	18:59:55	19:51:15	643.667	10,65	30,75	925	2.335	791,8
	13/11/2019	VTM NIEUWS 19u - 13/11/2019	18:59:54	19:53:17	662.018	10,95	31,92	1.041	2.851	926,1
	12/11/2019	VTM NIEUWS 19u - 12/11/2019	18:59:56	19:52:25	659.414	10,91	31,88	1.011	2.611	884,2
	11/11/2019	VTM NIEUWS 19u - 11/11/2019	18:59:57	19:50:58	702.558	11,62	31,17	853	2.609	725,4
	10/11/2019	VTM NIEUWS 19u - 10/11/2019	18:59:54	19:44:53	466.618	7,72	24,67	840	2.500	630,3
	09/11/2019	VTM NIEUWS 19u - 09/11/2019	18:59:53	19:41:34	526.383	8,71	29,22	974	2.360	677
	08/11/2019	VTM NIEUWS 19u - 08/11/2019	18:59:54	19:52:29	607.524	10,05	31,8	788	2.329	690,7
	07/11/2019	VTM NIEUWS 19u - 07/11/2019	18:59:53	19:52:41	596.622	9,87	29,25	916	2.703	806,2
	06/11/2019	VTM NIEUWS 19u - 06/11/2019	18:59:50	19:53:42	655.283	10,84	30,5	920	2.841	825,8

Changes introduced with ON study format

GEMIUS

Advertising content : gDE

(Gemius Direct effect)

Impressions	Unique cookies	Real users
1 679 590	133 532	86 182

Data

Placement name	Search	Impressions	Unique cookies	Frequency
ROS_IMU_300x250_		744 472	89 342	7.17
ROS_IMU_300x250_		622 427	84 554	6.38
ROS_Billboard_970x		458 143	54 056	7.43
ROS_Billboard_970x		423 694	54 743	6.90
ROS_IMU_300x250_		316 571	85 477	2.88
ROS_MobileBanner_		215 686	89 514	1.42
ROS_IMU_300x250_		185 509	50 028	2.44
ROS_MobileBanner_		97 462	21 820	1.36
ROS_IMU_300x250_		21 138	3 961	4.55
ROS_Billboard_970x		20 754	3 895	4.78
All		**3 146 958**	**359 906**	**7.10**

Data Export

Features	Real users	Audience composition
Gender		
Female	37 631	43.66%
Male	48 551	56.34%
Age		
0-14	0	0.00%
15-24	4 744	5.50%
25-34	11 287	13.10%
35-44	18 121	21.03%
45-54	16 909	19.62%
55+	35 121	40.75%
Dutch/French population		
Dutch population	5 753	6.68%
French population	80 429	93.33%
Educational level interviewed person		
None or primary	4 285	4.97%
Secondary low	5 320	6.17%
Secondary high gen., techn. art.	23 159	26.87%
Secondary high prof	7 765	9.01%
Bachelor	18 836	21.86%
Master	26 817	31.12%
Social group 4		
1-2	38 351	44.50%
3-4	22 156	25.71%
5-6	16 067	18.64%
7-8	9 194	10.67%
not qualified	415	0.48%
Question was not asked	0	0.00%

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… and

- Streams measures : script update
- Smart TV audience monitoring
- Rules update (apps, mobile sites…)
- Controls

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Methodology & results (reminder)

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What's next

Less silos

- <u>OVC : Online Video Content</u>

  Constant panel, planning on custom periods (Q1 2020)

  Refinement : long form / short form

  TV + digital publications :

  - Live digital viewing
  - Add fragments / previews
  - Add exclusive web videos
  - Profiles

- <u>OVA : Online Video Advertising</u>

  Total video planning : Audimetrie + CIM Internet Advertising measurement for TV+digital video

2020

Increased cooperation with Watch, Read, Listen, Cross Media commissions

Getting ready for a Cookieless world

- 3rd party tracking blocking : iOS, Mozilla Firefox, Chrome
- software panel (PC large enough, not mobile)

3rd party cookies not allowed by default

Intelligent Tracking Prevention

Chrome 80

Beta coming Dec 19 - Jan 9

Stable in 76 days (Feb 4)

24%

71%

Existencial questions

- CIM as data provider ?
- Third party verification vs international players ?
- Towards a transparent Belgian measurement ecosystem ?

Advertisers use different tools to understand the effectiveness of their ad campaigns. One type, called pixels, has played an important role across the web for over a decade, but was built for a world of single screens, not for the ways many people watch YouTube today. While more than 70 percent of time spent watching YouTube globally occurs on mobile devices, pixels can't report on the effectiveness of ads that appear in mobile apps. And many third-party pixels lack the privacy controls and user protections of newer technology. That's why, for the past several years, we've been taking action to limit the pixels we allow on YouTube while investing in a cloud-based measurement solution called Ads Data Hub that allows our advertisers to understand the effectiveness of their ads in a secure, privacy-safe environment.

Over the last year, we've been working with key measurement companies including Nielsen, Comscore, DoubleVerify, Dynata, Kantar and Integral Ad Science to migrate their services to Ads Data Hub. Once the migrations are complete early next year, we will stop allowing third-party pixels on YouTube.

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48 années de chiffres fiables et pertinents

Thank you

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