

# ANNUAL REPORT

2025





## FOREWORD

01

# The report by the Chairman, Stefan Lameire

Collaboration is and remains the foundation of CIM. Since our founding, we have been building measurements in which advertisers, media and agencies invest together. The shared desire to always have access to reliable, neutral and comparable data is the reason for our existence. This collaboration is not self-evident in a market where interests sometimes diverge, but precisely therein lies our strength.

What makes me particularly proud, however, is the way CIM demonstrates resilience and cohesion under these circumstances.

When I look back on the past year, I do so from the vision note we wrote at the start of my mandate. Our objective is to achieve impact and growth through continuous, high-quality and credible media research and to build a transparent, integrated and future-oriented ecosystem for the Belgian media.

That is why we will integrate all our studies into CIM ONE. We are fully engaged in this ambitious transition project that has been prepared in detail. Such a structural reform inevitably brings challenges. We must be realistic: there will undoubtedly be hiccups. Transformation on this scale never proceeds entirely linearly.

What makes me particularly proud, however, is the way CIM demonstrates resilience and cohesion under these circumstances. Thanks to the expertise and experience we have on board, we can switch quickly when needed. Our team and our experts prove daily that professionalism and agility can perfectly go hand in hand.

Equally important is the attitude of our stakeholders. The debate around the financing of CIM ONE, which lasted nine months, was intense but constructive. The final decision to secure funding for the coming five years demonstrates responsibility and long-term vision. Subject to the necessary adjustments, all parties involved realize that we are in the same boat. There is

active engagement, sometimes critical but always with the interest of the entire ecosystem in mind. This strengthens our collaboration and gives CIM the stability to carefully carry out its transformation.

For me personally, all of this confirms that the role of CIM becomes more important as the landscape becomes more complex. The more channels, platforms and formats emerge, the greater the need for a common, reliable measurement standard. CIM ONE must become the norm for future-proof measurement in Belgium.

At the same time, we look at the world with an open mind. Internationally, we see that our collaboration model inspires others. In a global market, we can only become stronger by sharing knowledge and learning from each other. We therefore remain actively in dialogue with potential foreign partners. An ecosystem in which transparency, neutrality and comparability are the norm must ultimately also include the major international tech platforms. A truly level playing field is essential so that advertisers, in consultation with their agencies, can design the best possible media mix based on objective and comparable data.

Our ambition also goes beyond technology and methodology. We see that CIM is once again very much alive today among advertisers and in the broader sector. The fact that younger generations are also finding their way to CIM is crucial to remain future-proof. Our move into the IHECS building symbolizes that open character: closer to education, research and young talent, and therefore closer to the future of our sector.

The extension of my mandate as Chairman by three years is therefore a confirmation of the confidence in the path we have taken together. I look forward to continuing this commitment together, with the same openness and collaboration, and in the conviction that as a sector we are stronger when we build on shared, reliable foundations.

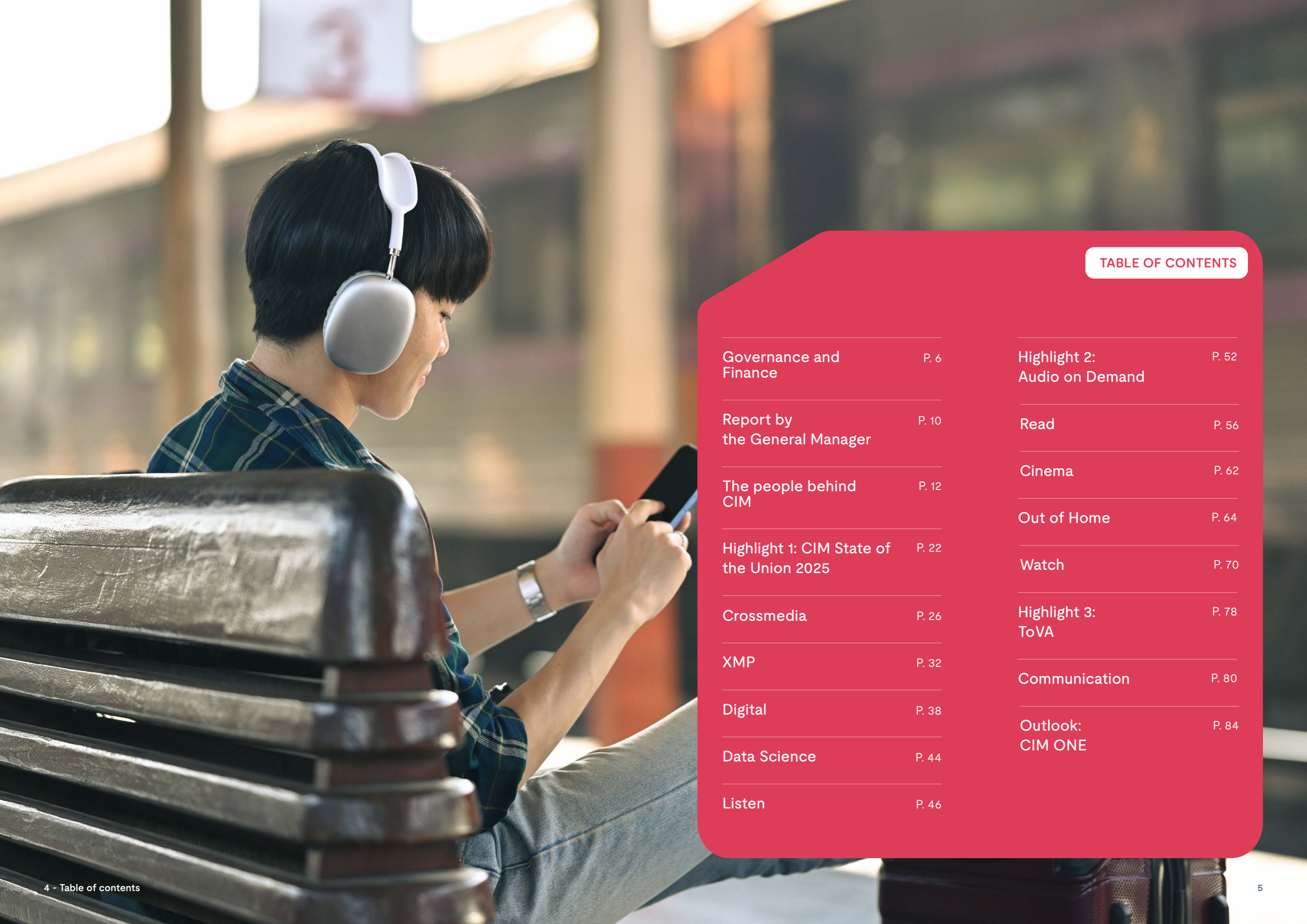


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## GOVERNANCE AND FINANCE

02

# The report by Véronique Defeld, Office Manager and Frédéric Pricken, FAP Manager

2025 was once again a busy year for CIM. The transformation continued, both in terms of studies, organization and communication. Below is an overview of the main files that were discussed and decided upon by the Board of Directors and the Bureau.

### The Board of Directors



#### Members until 22/04/2025

Bart Swings (Luminus, Secretary CIM), François Chaudoir (Space, Vice-Chairman CIM), Massimo Papa (RMB), Remi Boel (Omnicom Media Group), Sophie Vanderwinkel (IPM, Treasurer CIM), Tim Van Doorslaer (DPG Media), Valérie Morfitis (Unilever) and Veerle Colin (JC Decaux)

#### Members as of 23/04/2025

Bart Swings (Luminus, Secretary CIM), François Chaudoir (Space, Vice-Chairman CIM), Joris De Doncker (Bauer Media Outdoor), Luc Suykens (UBA), Massimo Papa (RMB), Remi Boel (Omnicom Media Group), Sophie Vanderwinkel (IPM, Treasurer CIM) and Tim Van Doorslaer (DPG Media)



6

meetings  
in 2025

### The Bureau



#### Members until 22/04/2025

Bart Demeulenaere (Ads & Data), Joris De Doncker (Bauer Media Outdoor), Luc Eeckhout (UBA) and Nathalie L'Hoir (Mediabrand)

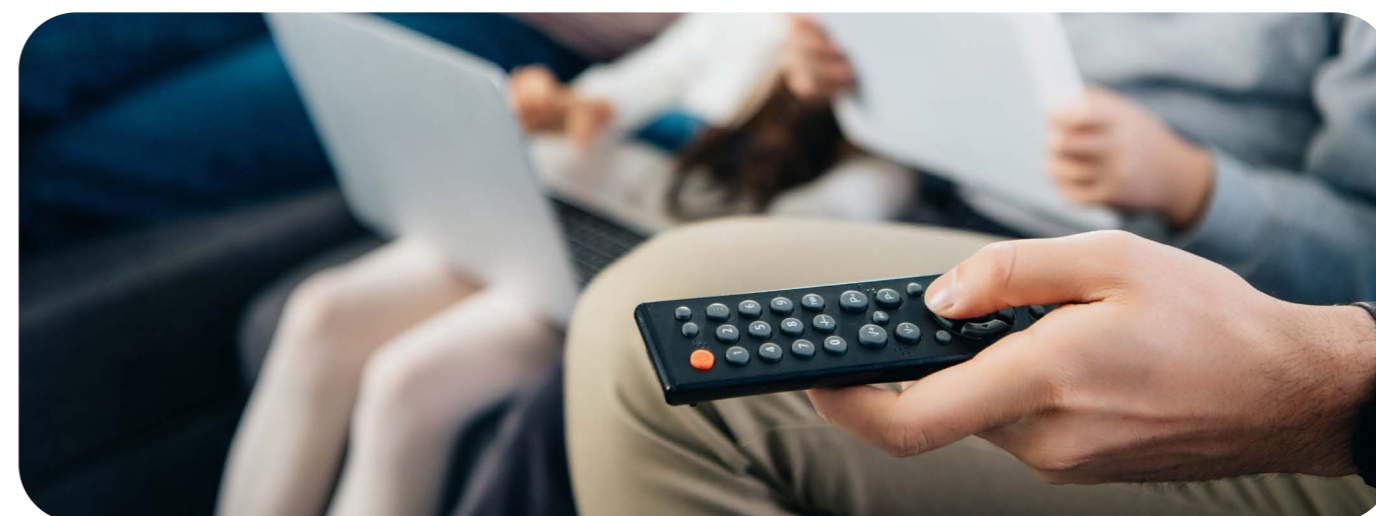
#### Members as of 27/05/2025

Bart Demeulenaere (Ads & Data), Luc Eeckhout (UBA), Nathalie L'Hoir (Mediabrand) and Veerle Colin (JC Decaux)



9

meetings  
in 2025



# The 2025 files

- Preparation and approval of the 2025 budget and the principles for financing the 2026–2030 period.
- Appointment of 2 new directors and change within the Bureau.
- Follow-up of the XMM project, partly financed by the Flemish Government.
- Approval of the extension of the mandate of Stefan Lameire (chairman) for 3 years.
- Approval of the extension of the mandate or a new mandate (1/1/2026 – 31/12/2028) of the chairpersons of the Technical Committees of CIM.
- And as always: follow-up of the studies (and the new research framework CIM ONE) and of the work of the Strategic Committees of CIM.

The Bureau prepares the meetings of the Board of Directors and oversees the implementation of the decisions taken there.



## Finance

The control of the financial situation, the annual accounts and the conformity of the recorded transactions with the law and the statutes is carried out by a statutory auditor, who is a member of the Institute of Company Auditors, Vincent De Wulf of the firm CdP DE WULF & C° BV. He prepares a detailed written report in relation to the annual accounts.

During the General Assembly of 21 April 2026, Mr. De Wulf will announce that the financial statements of the association, closed on 31 December 2025, give a true and fair view of the assets and financial position and will issue an unqualified opinion on the financial statements.

From 2026 onwards, CIM will work with a new accounting program. This will allow certain processes to be automated.



03

## The report by the General Manager Koenraad Deridder

The past year has once again confirmed how quickly the media landscape is changing. Media consumption continues to shift towards cross-media and the boundaries between channels are fading. Advertisers are also increasingly viewing these as part of one and the same consumption behaviour. The need for reliable, neutral and comparable data remains high. As CIM, we want to continue to position ourselves as a reference point in this changing landscape. This is not self-evident, but the result of the joint efforts of our members, partners and the CIM team.

### The consumer as a common thread

2025 was marked by the transition to CIM ONE, an integrated measurement system that integrates all media channels from a consumer perspective, with launch planned in 2027. The measurements are being expanded with digital meters and a new panel for measuring out-of-home media behaviour. By mid-2026, the new production system should be operational, followed by validation. In 2027, the new 'currencies' will start: Total Video, Total Audio and Total Digital.

### New solutions and data sources

In parallel with CIM ONE, many other innovations were also prepared and implemented in 2025, with a focus on the use of new data sources. For example, we publish audio on demand based on server logs, and for video we are investigating the use of Return Path Data from telecom operators and developing a tool for cross-platform reporting of advertising campaigns, using ad server data. Within Out-of-Home, a Proof of Concept is running with Wi-Fi sensor data to better map mobility. Where CIM has traditionally been strong in reach figures, we see that demand from the market is shifting from pure reach to quality, context and impact. CIM therefore guided research into attention and engagement within publishing. For cinema, it was decided to thoroughly rebuild the study based on new market needs.

### International standardization

International platforms are playing an increasingly important role. CIM ONE aims to measure them in a comparable way in order to create a more level playing field. Access to platform data, combined with audit and certification, is essential in this regard. CIM is following several paths to achieve this objective.

**Media consumption is becoming more complex but also richer and better measurable thanks to new solutions and data sources.**

Within the Halo project of the World Federation of Advertisers, CIM together with the UBA has ensured that strategic final decisions are now taken at a local level and is now also part of the HITAG Group, which reviews the project from a technical perspective. CIM is also closely monitoring the implementation of the European Media Freedom Act and, together with other JICs, has written a 'playbook' that explicitly positions JICs as ultimately responsible for the annual platform audits provided for in the regulation.

### Looking ahead with confidence

When I look back on the past year, I see a clear line. Media consumption is becoming more complex but also richer and better measurable thanks to new solutions and data sources. This supports relevant and effective communication. I would therefore like to expressly thank everyone who contributed to the functioning of CIM over the past year. Together, we continue to build a transparent and future-oriented measurement ecosystem for the Belgian media.



## THE PEOPLE BEHIND CIM

# The chairpersons of the Technical Committees

## The importance of the Technical Committees

The Technical Committees supervise the operational course of the various studies and monitor the publication of the results.

In addition, they organize the calls for tenders for new projects. They define the methodological guidelines, draw up the specifications, evaluate and rank the received offers and follow up (and control) the studies to ensure that they are correctly executed according to the established specifications. They also ensure compliance with the calculation rules in the planning software and the correct use of the data by the subscribers.

### A new structure and new chairpersons

2026 promises to be an important year for CIM, with the further rollout of new measurements. A first major change is the new structure of the Technical Committees (TC). CIM counts seven committees: Cinema, Crossmedia, Internet, Listen (Radio), Out of Home, Publishing and Watch (TV).

The Technical Committee Crossmedia will be transformed into the TC Recruitment & Surveys. This committee will be expanded with audiovisual media specialists and will have a new chairman. In addition to the Establishment Survey and the Target Group Monitor, it will henceforth oversee all surveys and the recruitment of panels. The Technical Committee Internet will also be given a broader role and will be renamed TC Digitalization. It will henceforth support all digitization projects of CIM.

Finally, we would like to thank everyone who contributes daily – or has contributed for many years – to this mission. We mention, among others, Remi Boel (Omnicom Media Group), who after many years as a member and chairman transfers the chairmanship of the TC Watch to Laurence Hellinckx, and David Lecouvet (Mediabrand), who hands over the chairmanship of TC Recruitment & Surveys to Jonathan Rijavec (Space). The other chairpersons will continue their mission in 2026 for a new term of three years.

A busy program, therefore, which underlines the importance of their role. That is why this year we give the chairpersons of the Technical Committees the floor to explain how they fulfil their role and mission within CIM.

# Quotes from the chairpersons



Credits Patrick Acken

## Nathalie L'Hoir – TC Cinema

“CIM Cinema’s Technical Committee plays a key role in establishing and updating the standards for measuring cinema attendance and the profile of cinema-goers.

It brings together experts from sales houses and media agencies.

Today, cinema is the only medium in Belgium that does not have a reach study. CIM and the TC Cinema are working on this with a brand-new study on total reach, average weekly reach, but also on the seasonality of reach (which is directly influenced by film release dates) and reach accumulation. The aim is to guarantee reliable and transparent data.

The specifications of this study are submitted for approval to the TC, but also to partners such as CineData, cinema operators and film distributors.

The challenge is to set up a study that meets the needs of all stakeholders.

Thanks to its work, TC Cinema contributes to strengthening the credibility of cinema as a medium and to supporting a structured and professional advertising market in Belgium.”



## Bernard Cools – TC Publishing

“Do not say ‘press’ anymore. From now on, speak of ‘publishing’. This designation also appears in the name of the study: Belgian Publishing Survey. This also reflects the diversification of publishers: in addition to the printed press, content is now also distributed via the internet, apps, but increasingly also via podcasts and even video. The measurement of reach is therefore adapted with a ‘total brand’ that encompasses all these realities.

At the same time, the study that used to be called ‘press’ has been rationalized. The economic context has forced stakeholders to focus on the essentials: measurement of fundamental data, more modest fieldwork and a “rolling” publication combining new data with data from previous fieldwork.

The mandate of chairman of the Technical Committee concerned therefore requires a good deal of adaptability. I believe this has been the case since the somewhat distant times when I took on the chairmanship of what was then the ‘Press Reach’ committee. A lot of water has flowed under the bridge. But I am pleased that our ‘publishing’ quartet will soon become part of the great orchestra of CIM ONE.”



## Stéphanie Piret – TC Listen

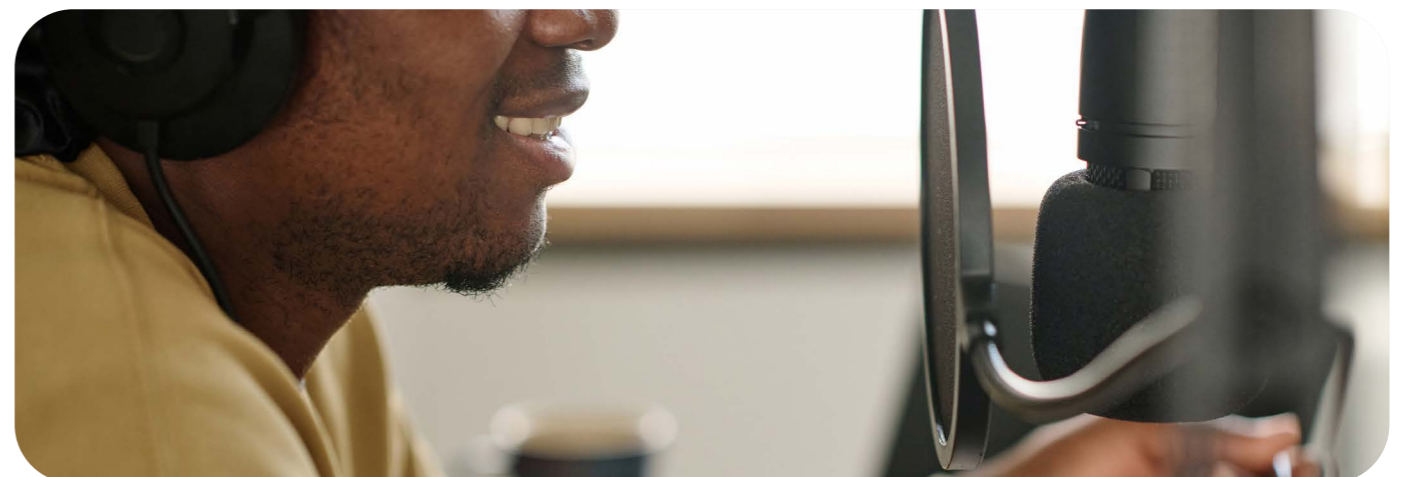
“The past three years, the work of the Technical Committee Listen has mainly focused on stabilization and a gradual integration of the digitalization of media.

In 2026, however, we are on the eve of a new and significant challenge: a transition as smooth as possible towards CIM ONE, an entirely new methodological framework. This implies a major change for the CIM Audio measurement. Since the integration of a single audio measurement within CIM, we have never experienced such far-reaching changes as those that are now approaching.

Over the past three years, we have seen the measurement evolve: integration of new recruitment sources, partial panelization, improvement of the respondent experience with the renewal of the digital diary, better understanding of digital audio thanks to the

integration of CIM Audio Time, CIM Radio Stream Monitor and AOD ranking. The transition to a consumer-oriented panel, however, is a change of a completely different order, offering new perspectives for audio and the entire media landscape.

My mission for the coming years will be to contribute to as smooth a transition as possible for the Belgian audio market. For more than 20 years, the CIM radio currency has formed the basis for radio planning and trading in Belgium. The challenge will be to guide the market through this transition, ensure confidence in the new measurement and provide refined insight into digital usage. It is an ambitious challenge, but also a stimulating evolution for our sector. I hope to make optimal use of the innovations offered by this new research framework, while maintaining the reference value and stability expected by the market.”





### David Lecouvet – TC Recruitment & Surveys (old chairman)

“During my mandate within CIM, I had the honour of taking on the chairmanship of the CIM Crossmedia Committee, in a context of profound changes in media usage and market expectations.

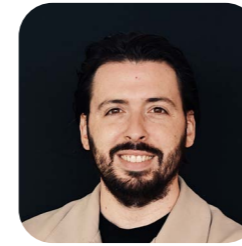
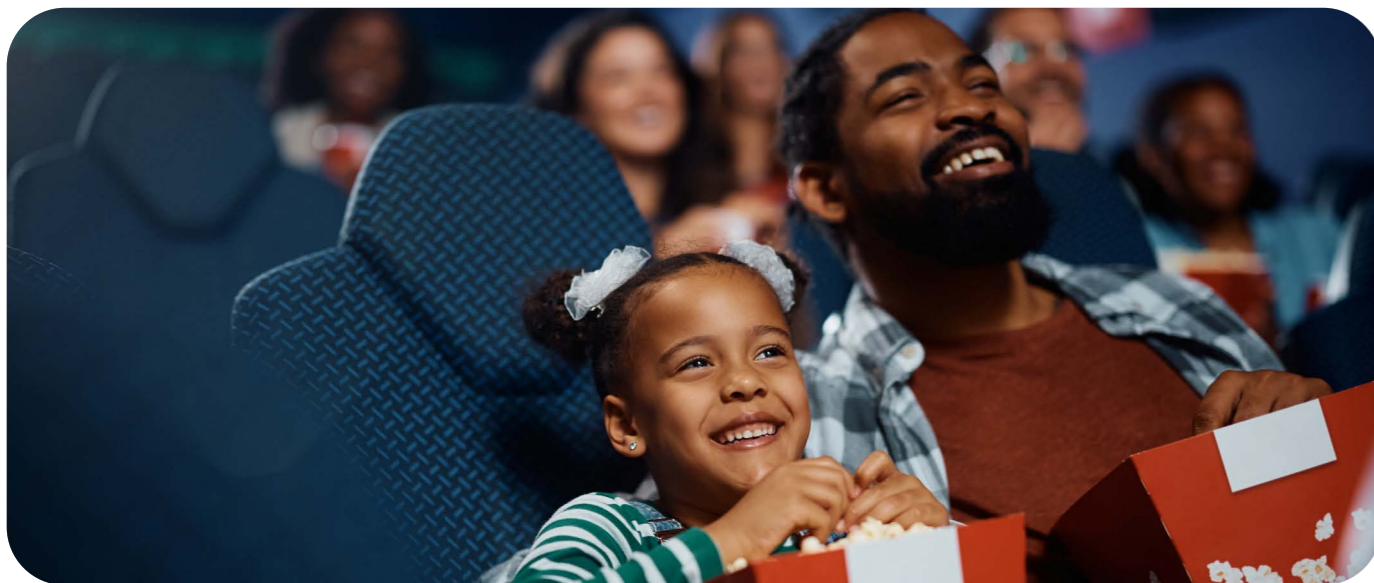
This assignment aimed to optimize the strategic component of media studies, strengthen the coherence and comparability of cross-media measurements, while taking into account the increasing complexity of digital and offline ecosystems. The work delivered, in my opinion, forms a solid foundation, but not an endpoint.

Cross-media measurement evolves by definition: it must continue to adapt to new formats, emerging platforms and the real behaviour of target groups.

The future challenges are numerous: ensuring methodological robustness, maintaining market confidence and finding the right balance between accuracy, readability and operational applicability. An additional key challenge lies in the ability to connect data, insights and the concrete use by advertisers and agencies.

The future of CIM’s cross-media mission therefore rests on strengthened collaboration between all stakeholders, as well as on a clear vision of the value that measurement must provide for decision-making.

I am convinced that CIM has the necessary expertise and legitimacy to continue playing a central role in this dynamic in the future.”



### Jonathan Rijavec – TC Recruitment & Surveys (new chairman)

“I am very honoured and proud to join CIM as chairman of the Technical Committee Recruitment & Surveys for the 2026–2028 term.

Our sector is undergoing an extremely rapid transformation and it is crucial to have solid reference points. CIM is one of them: an indispensable reference for the Belgian media and advertising sector.

However, these reference points must evolve along with the market, and the coming three years will undoubtedly be full of challenges. One of these challenges is the implementation of the CIM ONE Panel, an ambitious and necessary project that responds to the needs of the players in the sector.

I will fully commit myself to ensuring that the roadmap is respected, coherent and beneficial for the entire market. Thanks to my experience in a research agency and my current role as Chief Strategy Officer at a media agency, I can build a bridge between the methodological challenges in panel construction and the requirements of users in exploiting the output.

Finally, I would like to thank the CIM team for kindly welcoming me into the Technical Committees team, and I look forward to contributing, together with the members of the Committee, to the success of these great projects.”



### Jos Van Campenhout – TC OOH

“During my previous mandate as chairman of the Technical Committee OOH, the focus was on consolidating and further refining a methodologically strong and market-supported reach study for OOH and DOOH. In a context of increasing digitalization, it is essential that data quality, transparency and reproducibility remain central.

For the coming years, I see my mission in further optimizing the measurement models, with particular attention to flexibility and granularity, as well as the calibration of data sources and the consistency between classic OOH measurements and DOOH metrics. An important challenge remains the correct balancing of innovative data sources and technologies with statistical stability and comparability over time.

The role of the technical committee is crucial in this: safeguarding methodological choices, validating assumptions and creating trust in the figures. Only through a rigorous, data-driven approach and close collaboration with the Permanent Structure and all market parties can the OOH reach study maintain its relevance and credibility within the broader CIM measurement framework.”



### Remi Boel – TC Watch (old chairman)

The media industry is undergoing an unprecedented acceleration of its transformation. This shift is largely driven by the growing power of international “big tech” players. In turn, they are putting pressure on national media ecosystems, which is leading to an increasing concentration among local media players.

According to a European report on concentration in the audiovisual industry, European media groups still account for 56% of the revenue of the top 100 groups. This is already 11% less than ten years ago.

Marketing and media strategies are also increasingly being designed and managed at an international level. In this context, studies based on a level playing field are crucial. Measuring is knowing, and audience measurement is therefore vital for everyone active in the media industry, both literally and figuratively.

That is why an organization such as CIM is indispensable—not only to carry out and audit these measurements in a market-neutral way, but above all to enable true “apples-to-apples” comparisons. This is particularly relevant for measuring the audiovisual landscape (TV, SVOD, AVOD, OTT, CTV).

The ongoing challenge for CIM—both in the interest of the local media ecosystem and to ensure accurate, consistent, and comparable audience measurement across all these channels—is to present the added value of each media channel, whether involving local or international players, in a market-aligned and comparable way, so that strategic media recommendations can be made on a well-founded basis.



In a world where we are constantly “bombed” with commercial messages, the emotional power of video remains undeniable.



### Laurence Hellinckx – TC Watch (new chairman)

“From a very young age, I have been immersed in the world of television and advertising. As a child, I would often walk through the corridors of the RTL control room on Avenue Lloyd George, where my mother worked. After completing my studies, my first internship... at CIM (yes, even back then!) marked the beginning of a rich and varied career: media planning at Euro RSCG and DDB, followed by several years at Wavemaker — first as Client Lead, then as Director of the TV department — and eventually at Omnicom Media, where I currently hold the role of AV Excellence Lead. All these experiences have given me expertise that is both tactical and strategic.

In a world where we are constantly “bombed” with commercial messages, the emotional power of video remains undeniable. Never before have we consumed so many hours of content, and never have we had so many different ways to do so.

As Chair of the Technical Commission Watch, I aim to contribute to the development of a truly total video measurement: through the integration of TV and online video measurement in CIM ONE, by refining online measurement for specific target groups, by analysing the possibilities of integrating telco data, and through other innovations in data collection and measurement. In addition, I will oversee the continued evolution of ToVA by integrating more platforms into the planning component and supporting the launch of ToVA Post Buy.

I look forward to working closely with the members of the committee to build a video measurement system that accurately reflects the richness of our audiovisual landscape and prepares our market for the innovations of tomorrow.”



## Sébastien Reps – TC Digitalization

“I am honoured to begin this new term as chairman of the Committee, now called TC Digitalization. I look forward with enthusiasm to this crucial period for reach measurement and digital integration within CIM.

The past term was marked by an important step forward: the transition to the Joint Audience Recognition (JAR) methodology for measuring internet reach. Given the gradual disappearance of third-party cookies, this change makes our data future-proof and strong. We have significantly improved the accuracy of Real Users, especially on iOS and Safari, and strengthened the reliability of our estimates thanks to first-party cookies. This change has laid the foundation for a more transparent digital measurement that meets future standards.

**We will need to define new metrics, examine the importance of identity solutions for our measurements and make our data accessible via APIs and modern dashboards, while also addressing the measurement of AI solutions.**

The new name (“TC Digitalization”) perfectly reflects the scope of our ambitions. Our mission is expanded to oversee the digitalization of all CIM measurements, with the aim of closing the gap between digital advertising investments and the share of our budget devoted to measuring them. We will work on the harmonious integration of all big data sources – from platforms to Connected TV, but also audio and Out-of-Home. The CIM ONE project will be central in this approach, with the aim of uniform measurement references (Total Video, Total Audio, Total Publishing) and a coherent cross-media vision.

There are many challenges: rapid technological evolution, the complexity of integrating different sources, the need for advanced modelling of digital identity and the continuous respect for privacy. We will need to define new metrics, examine the importance of identity solutions for our measurements and make our data accessible via APIs and modern dashboards, while also addressing the measurement of AI solutions.

With additional members, the TC Digitalization is committed to providing the sector with reliable, transparent measurement tools adapted to the challenges of the constantly evolving digital market.”



HIGHLIGHT 2025 01

Milestone  
 CIM State of  
 the Union 2025

## State of the Union 2025: impact, creativity and collaboration as a lever for the future

On 23 September 2025, the second edition of the State of the Union took place in the prestigious setting of La Monnaie in Brussels, organized by CIM and the Advertising Council.

The event brought together the key players from media, advertising and policy around one central question: how can the sector maintain and strengthen its societal and economic impact in a rapidly changing ecosystem?

An important eye-opener came from Geert Noels (Econopolis), who frames the impact of media and advertising much more broadly than is often the case. Research by Econopolis, through its subsidiary Ortelius, shows that the direct and indirect impact of the sector together amounts to 15.1 billion euros, or 2.8% of Belgian GDP. Media and advertising not only finance local content and information, but also stimulate competition, innovation, economic growth and democratic resilience.

At the same time, the sector faces major challenges. The shift towards digital media consumption, the dominant position of international tech platforms and the blurring boundaries between sectors put pressure on the local ecosystem. During the debates, there was therefore a clear call for a level playing field, with attention to fiscal incentives for local players and a balanced relationship between regulation and self-regulation.

Creativity emerged as a clear asset. According to Petra De Roos (ACC), local creations perform better than international ones and creativity remains a crucial differentiator, especially in an era in which AI generates an abundance of content. Investing in strong, local creative teams is therefore essential.

Innovation and collaboration were also common threads throughout the program. CIM highlighted

the progress of CIM ONE, an innovative cross-media measurement approach that will support the market from 2027 with transparent, comparable and future-proof data. In addition, concrete collaborations were announced, including around AI-driven applications.

Finally, Flemish Minister of Media Cieltje Van Achter, in a video message, emphasized the importance of collaboration, self-regulation and investments in local content: “Local content is advertising for ourselves.”

The second State of the Union made it clear that the sector and government recognize the same challenges and are looking in the same direction for solutions. The foundation has been laid to further translate these shared ambitions into concrete action.

CIM and the Advertising Council thank all participants and speakers for their participation



and cooperation: Yannick Carriou (Médiamétrie / AMC), Agnès Maqua (AdaStone Law), Marc Frederix (Advertising Council), Geert Noels (Econopolis), Yanaïka Denoyelle and Kristof Eggermont (Ortelius), Liesbeth Bernaerts (Kinesso), Toon Diependaele (National Lottery), Hugues Rey (Havas Media), Jan De Moor (Bauer Media Outdoor), Thierry Hugot (Rossel), Wim Jansen (DPG Media), Frederik Delaplace (VRT), Jean-Paul Philippot (RTBF), Nathalie L’Hoir (UMA), Petra De Roos (ACC), Luc Suykens (UBA) and Stefan Lameire (CIM).

The conclusions have once again been summarized this year in a white paper.

Downloadable on our site.

Extra insights about this event or want to (re) watch some debates?

Be sure to take a look at our “State of the Union Clips”, a series of short video fragments with a common theme: “how media, advertising and

technology can thrive together in a rapidly changing market”. The State Clips are available on our site, classified by theme.

1. Improving audience measurement
2. Thriving in a changing market
3. The impact of local media and advertising
4. Collaboration as a game changer
5. The role of regulators and policy makers in advertising and media
6. Insights in AI and other new tech solutions
7. Final conclusions



## CROSSMEDIA

04

# The report by Michaël Debels, Research Director

In addition to studies on specific media, CIM also conducts so-called strategic studies. These provide benchmarks regarding equipment, general media consumption and 'consumer insight', which can be used by all CIM members.

The design and follow-up of these studies are entrusted to the Strategic Committee Crossmedia, Publishing & Digital (CPD) and the Technical Committees Crossmedia and Publishing (Press).

## The Strategic Committee CPD



### Members

David Lecouvet, chairman (Mediabrand), Annelore Van Hove (Delhaize), Bart De Pauw (WPP Media), Bernard Cools (Space), Coralie Dalcq (Alken Maes), Edouard De Witte (Rossel), Gaetano Palermo (Engie Belgium), Gauthier Piret (Transfer), Gert Delgouffe (Bauer Media Outdoor), Joris De Ryck (Roularta), Koen Van Rhijn (Billups), Luc Eeckhout (UBA), Matthias Langenaeker (Omnicom Media Group), Patrick Van Dijck (Brightfish), Rikkert Van Loo (Ads & Data), Sandrine Penninckx (RMB), Sascha Van Der Borght (MMS Communications Belgium), Sébastien Reys (EssenceMediacom), Sofie Van Craen (Zigt Media), Sophie Vanderwinkel (IPM), Thijs Vanderhaegen (VRT), Tim Van Doorslaer (DPG Media), Veerle Colin (JC Decaux)



8

meetings  
in 2025

## The Technical Committee Crossmedia



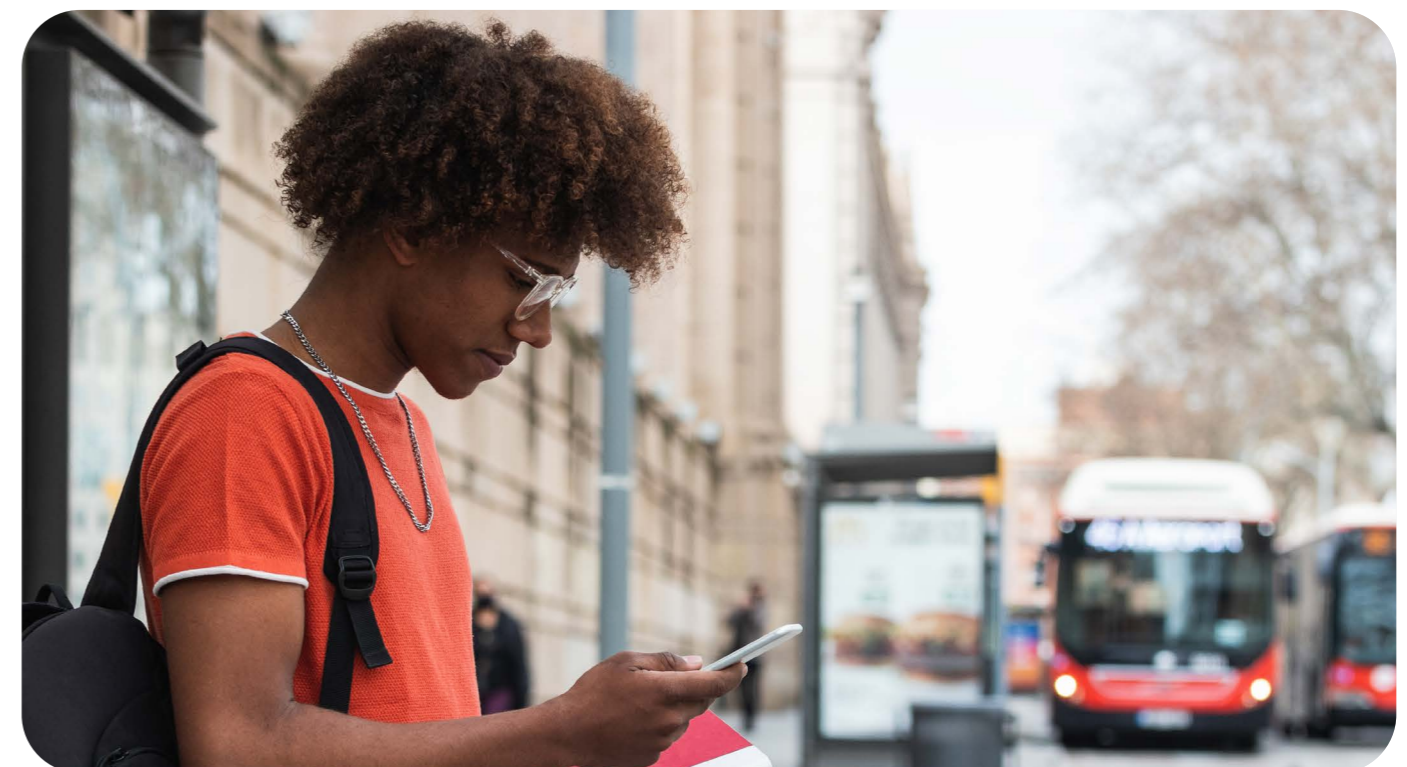
### Members

David Lecouvet, chairman (Mediabrand), Louise Van Buynder (Roularta), Mathilde De Maere (Havas), Roel Palmaerts (Mindshare), Sabrina Van Impe (JC Decaux), Stefan Delaeter (VAR)



5

meetings  
in 2025



01

## The Establishment Survey (ES)

Conducted by GfK

The main objectives of the ES are to monitor trends in the ownership and use of media devices and the general evolution of media consumption, as well as to combine ES data with government statistics in order to determine the CIM Golden Standard. This standard describes the Belgian population and makes it possible to define benchmarks for all CIM studies (such as the size of the universe, weighting objectives and recruitment objectives for panels, ...).

02

## The MediaWatch Panel

Conducted by Ipsos

The MediaWatch panel is owned by CIM. It is composed through recruitment from multiple sources – face-to-face, by post, by telephone and online – in order to obtain a high-quality panel that can be used for all CIM studies.

This proprietary panel provides a solution to the increasing recruitment difficulties in traditional surveys, such as the growing refusal to participate and the resulting problems with representativeness and costs.

03

## The Target Group Monitor (TGM)

Conducted by Ipsos

The TGM collects information on purchase responsibility and consumption habits for a wide range of products and services, divided into 24 sectors. In addition, it maps the attitudes of the Belgian population.

04

## The Virtual Population (Golden Standard)

Developed by CIM

The Golden Standard is a description of the socio-demographic structure of the Belgian population and is updated once a year. It serves as a reference for all CIM studies but is freely accessible to everyone, for example to set up a sampling frame for market research or to assess the representativeness of a study.

In the future, the virtual or synthetic population may serve as a possible solution in large hybrid studies, to combine and extrapolate data from different sources.

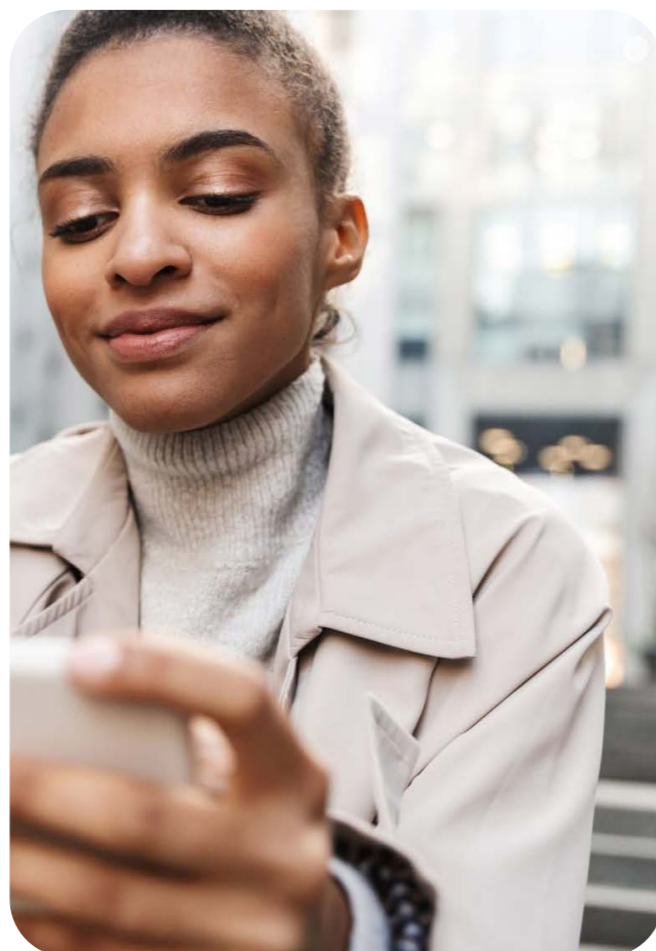
This VP is an extensive database with as many rows as there are inhabitants in Belgium. For each inhabitant, a number of characteristics are modelled based on government statistics and CIM's own studies.

# The 2025 files

- The Strategic Committee worked on finalizing the architecture of the new CIM ONE:
  - Finalizing and validating the components and budgets of CIM ONE;
  - Defining the use cases and the added value of CIM ONE for the local ecosystem;
  - Consulting potential future strategic partners as a source of new data or technical solutions to enhance the value of CIM ONE.
- The Committee also supported the decision-making process of the various tactical commissions and committees regarding the inputs, outputs, and planning of CIM ONE.
- CIM further followed up on the XMM projects: the analysis, optimization, and validation of the first results of the Cross-Media Panel (XMP), the launch of

recruitment for the French-speaking part of the Cross-Media Panel, the conclusions of the POC on RPD, and the development of the solution for campaign evaluation (post-buy) for Total Video (XMM Ads / ToVA Post Buy), and the attention measurement project.

- The Virtual Population was updated on 15/01/2025 and is available via a dashboard on the CIM website.
- The ES results from the 2024–2025 fieldwork were published on 18/09/2025. The main results of ES 2025 are available via a dashboard on the CIM website.
- The TGM results from the 2024–2025 fieldwork were published on 15/12/2025. This was the first publication of results from the renewed TGM/BPS fieldwork, in which synergies were achieved with the ES fieldwork.



**80 000**  
completed CIM questionnaires since the creation of the MediaWatch panel.

**97%**  
of Belgians watch video

**86%**  
of Belgians listen to audio

according to the ES, with broadcaster content remaining dominant.

## New in 2026

On the 2026 agenda are already the following:

- As the main agenda item of the CS CPD:
  - Validation of the outputs of CIM ONE and of the transitions to the new currencies
  - The conditions and modalities for access to the data and use cases of the CIM ONE outputs
- The TC CrossMedia will be transformed into a new Technical Committee that will monitor the developments of the ONE Panel. In this context, the name will change to “TC Recruitment & Surveys,” and the composition of the committee will also be adjusted. Marco Marini (RTL Belgium) and Dany Deroncourt (RTBF) will join this new TC, under the new chairmanship of Jonathan Rijavec (Space).
- In addition to monitoring the fieldwork and publications of the ES, TGM, and MediaWatch, this TC Recruitment & Surveys will primarily focus on the development of the CIM ONE Panel and the virtual population. In 2026, key priorities will include the development of the French-speaking panel and the revision of the CIM questionnaires, in order to optimize both the survey process within the CIM ONE Panel and its integration into the CIM ONE virtual population.
- The next publication of the ES (fieldwork 2025–2026) is scheduled for the second quarter of 2026.
- The next publication of the TGM (fieldwork 2025–2026) is scheduled for the fourth quarter of 2026.





XMP

05

# The report by Cathérine Liekens, Project Manager

Media consumption has changed significantly in recent years, driven in part by the growing use of smartphones, tablets, and laptops, combined with an ever-expanding range of content. As a result, it is becoming increasingly difficult to accurately monitor and analyse media usage.

That is why the new Cross Media Study is being launched, with the support of the Flemish Government and commissioned by the specially established CrossMediaal Consortium VZW (XMC), composed of nine members: six media groups, two advertising sales houses, and one federation, together representing the entire Flemish media ecosystem: Ads & Data, DPG Media, Mediafin, Mediahuis, Niet-Openbare Regionale Televisieverenigingen Vlaanderen (NORTV), Roularta Media Group, Play Media, Vlaamse Audiovisuele Regie (VAR), and the Flemish public broadcaster VRT.

This unique study uses the latest technologies to provide a clearer picture of the various ways media are consumed today through passive measurement.

This study is an important pillar in the lead-up to the CIM ONE Panel.

## The Technical Workgroup

### Members

Bart Gunst (Trustmedia), Dominique Vancraeynest (technical project manager XMC), Dries Janssen (NORTV), Frank Neuckens (VRT), Jeroen Coeymans (Play Media), Louise Van Buynder (Roularta), Mélusine Naômé (DPG Media), Rikkert Van Loo (Ads & Data), Stefan Delaeter (VAR)

12 meetings in 2025



# The XMP panel

For this new Cross Media Study, a new panel has been set up: the XMP Cross Media Panel, the first single-source study to passively measure cross-media reach, initially in the northern part of the country.

Both panel recruitment and the study itself are carried out by Ipsos.

CIM is responsible for project management in 2024–2025 and will take over the study from 2026 onwards in the context of the ONE Panel project.

The measurement technology consists of two apps, to be installed on the devices used by the panellists – at least on their smartphone: Mediacell+ (passive audio matching) and RealityMine (passive online measurement).

## In 2025

The first steps taken in 2024 were further developed across all three project lines:

01

**Project Line 1** involves setting up a cross-media measurement within a new panel based on at least one passive measurement.

The following elements were finalized and continuously monitored:

- The panel recruitment objective was reached on April 1, 2025, with 1,500 panellists in production.
- Churn, representativeness, quality, and stability of the panel have been continuously monitored since then.
- The output files were finalized, and since June these files have been delivered weekly and integrated into the Techedge processing software used by the members of the Technical Working Group to analyse the data.
- Continuous quality checks were performed for TV, radio, and online, mainly based on comparisons of XMM figures with CIM benchmarks. Based on these analyses, taxonomy, referencing, and data processing were further optimized.
- A dataset was also provided to Mediapunt as part of the collaboration with academic institutions.
- A principled agreement was reached among all parties regarding the implementation of watermarking for radio in 2026.

02

**Project Line 2** involves developing algorithms and building know-how in data linkage.

Significant progress was made in 2025 on the following projects:

- Integration of Gemius tags in the RealityMine measurement to incorporate the additional information contained in these tags into online measurements and reporting.
- Setting up a Proof of Concept (POC) for Return Path Data (RPD). The POC regarding the integration of RPD from the operators Proximus and Telenet was finalized. This POC allowed a model to be established for integrating RPD data with TAM data, to analyse the impact of this integration on TV results, particularly regarding the reduction of “zero ratings,” and to define the conditions for the industrialization of the process.
- Development of the XMM ads (ToVA Post Buy) project, aimed at calculating “Total Video” campaign results by combining Ad Server data with TAM measurement.

This project was entrusted to DataBreeders, which advanced the main developments to a beta version (collection of Ad Server data, matching with TAM panel data, modelling to individualize and profile impressions).

03

**Project Line 3** involves developing models to enrich CIM currencies.

In this context, a project note for the “attention measurement” project within publishing was prepared in 2024, including the integration of the quadruple articulation model, after consultation with representatives from academia.

In 2025, the RFP for this study was issued, and the project was assigned to Sapience after a thorough comparison of the proposals received.

The study proceeded smoothly and was delivered within the planned budget and timeline: fieldwork started on September 5, and the first results of the study were presented on December 18.

These results were well received by stakeholders, who in February 2026 commissioned Sapience to carry out further additional and in-depth analyses.

# In 2026

In 2026, both the Cross Media Panel and the XMM study will be conducted nationally, the role of XMC (the CrossMediaal Consortium) will be taken over by CIM in April, and XMM will become a pillar within CIM ONE.

Work will continue in various project lines and areas:

## Project Line 01

Expansion to the French-speaking part of Belgium in terms of panel, taxonomy, and measurement.

- Panel recruitment is handled by GfK. Panel management and production are carried out by Ipsos. Objective: a representative French-speaking panel with 1,500 panellists in production, including 500 overlapping with TAM, by the end of June 2026.
- Development and updating of the French taxonomy and update of the Dutch taxonomy.
- Updating of the national lists of media to be included (TV, radio, online).
- Testing of French-language results, with ongoing monitoring of Dutch-language results.
- Implementation of watermarking for radio.

## Project Line 02

Data linkage

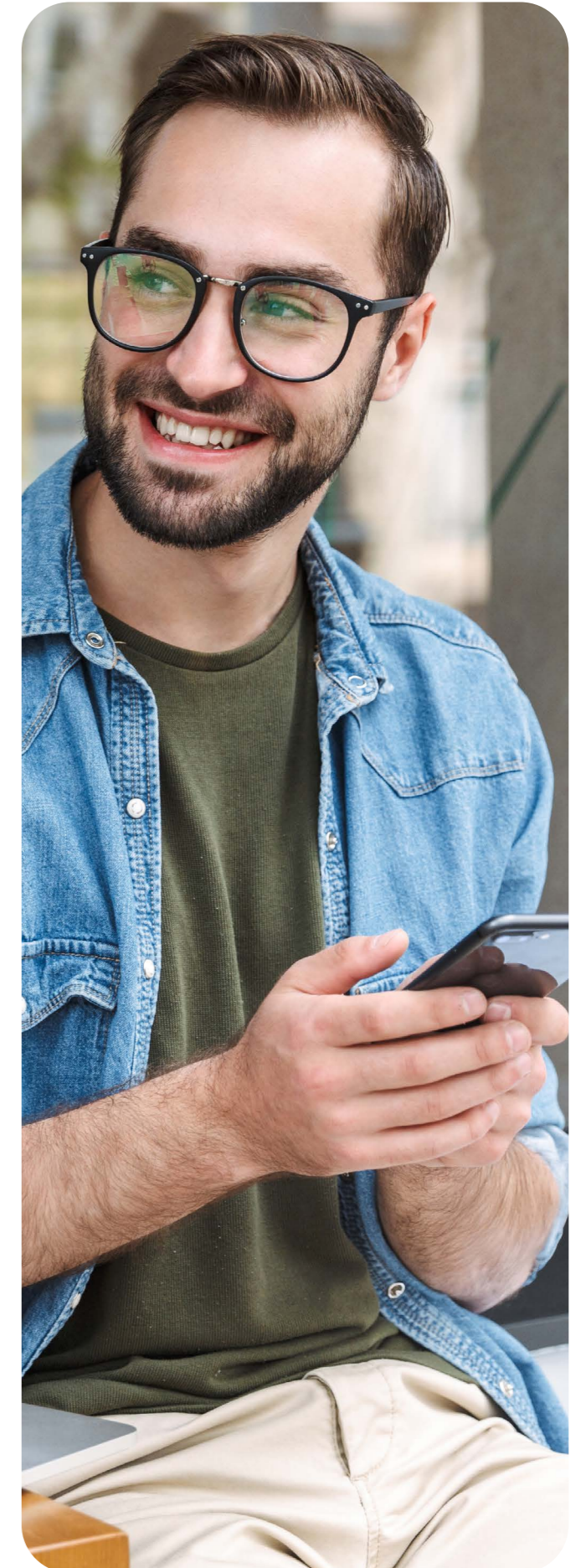
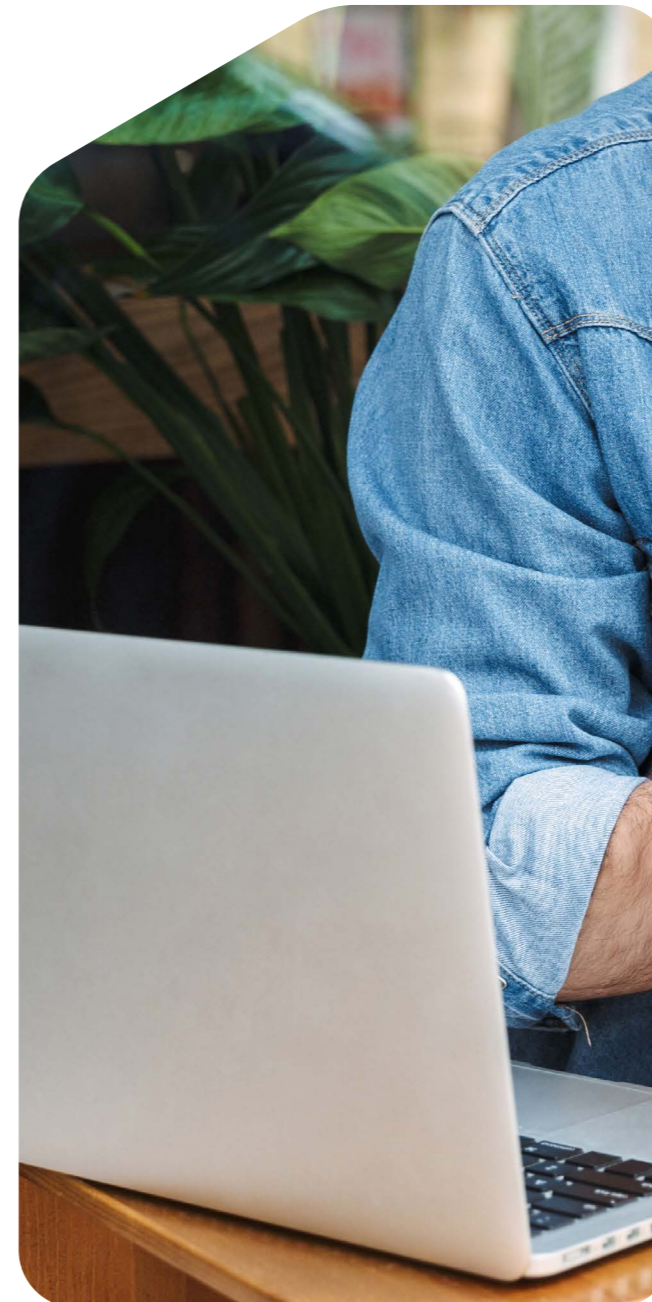
- Within XMM: completion and automation of the Gemius tag integration, including measurement, processing, and reporting.
- Within CIM ONE: development of the virtual population and linkage of XMM and CIM studies in preparation for the new CIM currencies in 2027.
- Future developments: including software rationalization, API connections with agencies, and the update and expansion of planning tools.

# 1500

panellists in production  
as of 1 April 2025

# 3750

measured  
platforms





DIGITAL

06

# The report by Salomé Basch, Research Executive

The CIM Internet study measures traffic to websites, apps and players and estimates their reach. This is done in accordance with privacy legislation and GDPR guidelines. The study constantly evolves due to the continuous changes in the digital landscape and the technology used, specifically adaptations to the operating systems of devices and changes in browsers and applications.

We also want to expand the scope of our study. Our ambition is to have a complete picture of all online consumption of the Belgian population, for the media and the Belgian platforms participating in our current study, but also for all other actors, such as social media and international streamers, and that on all mobile devices and on Connected TV.

## The Strategic Committee



### Members

David Lecouvet, chairman (Mediabrand), Annelore Van Hove (Delhaize), Bart De Pauw (WPP Media Belgium), Bernard Cools (Space), Coralie Dalcq (Alken Maes), Edouard De Witte (Rossel), Gaetano Palermo (Engie Belgium), Gauthier Piret (Transfer), Gert Delgouffe (Bauer Media Outdoor Belgium), Joris De Ryck (Roularta), Koen Van Rhijn (Billups), Luc Eeckhout (UBA), Matthias Langenaeker (Omnicom Media Group), Patrick Van Dijk (Brightfish), Rikkert Van Loo (Ads & Data), Sandrine Penninckx (RMB), Sascha Van Der Borgh (MMS Communications Belgium), Sébastien Reps (EssenceMediacom), Sofie Van Craen (Zigt Media), Sophie Vanderwinkel (IPM), Thijs Vanderhaegen (VRT), Tim Van Doorslaer (DPG Media), Veerle Colin (JC Decaux)



8

meetings in 2025

## The Technical Committee



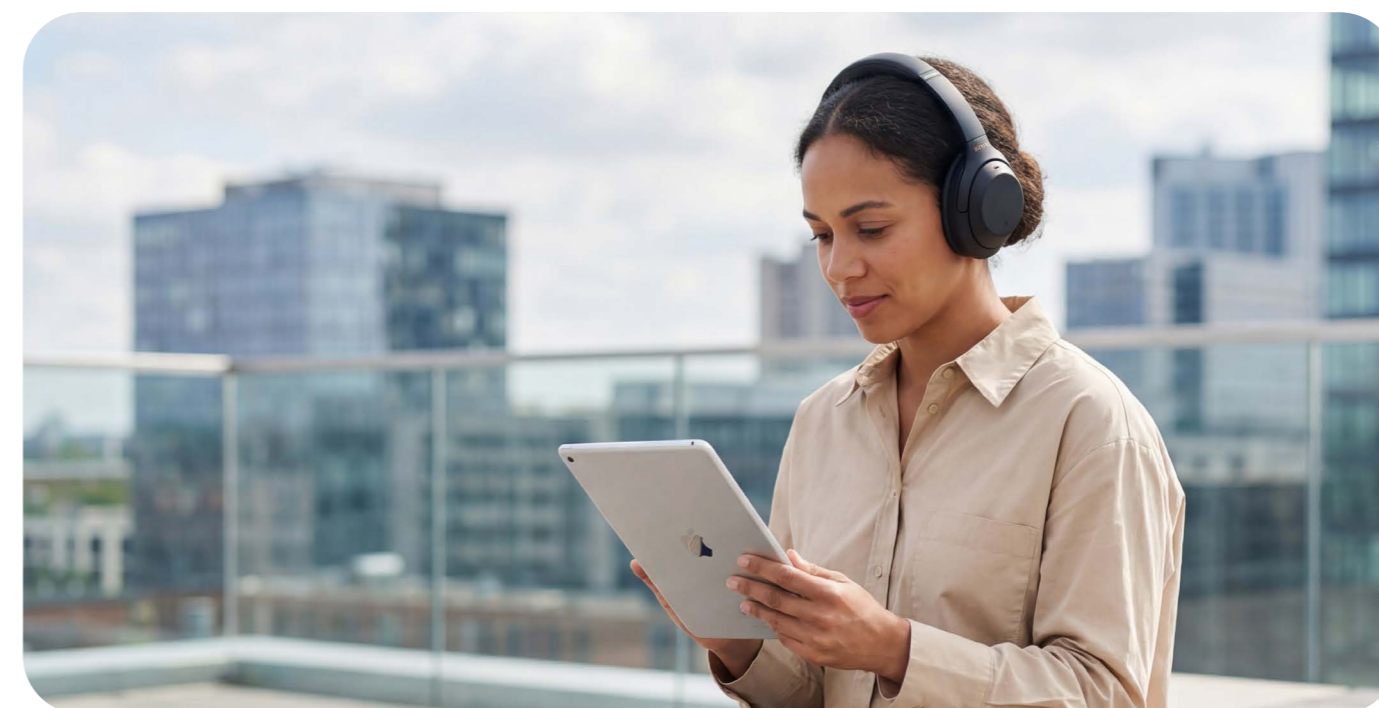
### Members

Sébastien Reps, chairman (EssenceMediacom), Charlotte Van Der Stappen (Ads & Data), Corentin Franzin (Mindshare), Hanae Schoofs (Rossel), Frank Neuckens (VRT), Isabelle Lambert (Mediabrand), Lauranne Van Cutsem (Mediafin), Mathieu Pieters (RTL), Sebastien Barbieri (RTBF), Stéphanie Radochitzki (ING), Thierry Hottat (IPM), Tom Overloop (DPG)



4

meetings in 2025



# THE STUDIES IN BRIEF

## CIM Internet Conducted by Gemius

The CIM Internet Study consists of two parts: the measurement of traffic for Belgian and Luxembourg media and the measurement of reach for Belgian media. The traffic of sites, apps and players that participate in the study is measured using a script developed by Gemius. The reach study calculates the profiles that these traffic data represent by using a panel.

Since 2020, data from the CIM Internet study has been used in mergers with the CIM TV and press studies.

## The 2025 files

### An improved method to estimate internet reach

To make our study future-proof, several improvements were implemented.

#### The JAR method: better measurement through first-party cookies and new identifiers

The new JAR methodology (Joint Audience Recognition) has been used since 1 February 2025 and applies retroactively from 1 January 2025. This new method makes it possible to use first-party cookies instead of the threatened third-party cookies and also has new modelling to estimate reach across sites.

For apps, the modelling of Real Users is improved because in the new method we have more identifiers, in particular the AppVisitorID, which combines the AdvertisingID and the VendorID. The reach of app users within Apple's iOS environment is more completely estimated. Additionally, for in-app players, Real Users from traffic without identifiers are now also estimated.

The JAR method also improves other metrics, such as:

- Visits: where visits for traffic without identifiers are estimated.
- Unique Applications (UA): which are based on AppVisitorID, and no longer on cookies. This solves the problem of cookie deletion and therefore the overestimation of the metric.
- Unique Browser (UB): which now uses first-party cookies.

#### ToVA: connected TV traffic and reach estimation

Thanks to the Gemius tagging that has been implemented in cTV applications, this traffic is known and reported in our tools. In the absence of a Cookie Panel for cTV, an estimation of reach is not yet possible with our partner.

Since January 2025, however, reach has been estimated in the ToVA tool based on this traffic, applying a co-viewing index of 1.53 (based on a CIM study from 2024).

#### Reporting web-exclusive video content

The digital usage of content that is broadcast on television is already reported in the TV reporting tools (web ratings). The Committee has investigated whether the integration of "web exclusive" content is also possible and has identified the various dimensions that must be optimized to achieve this (definition and time window of web-exclusive content, technical parameters that must be harmonized and implemented by broadcasters).

# THE STUDIES IN BRIEF

# New in 2026

## Integration of digital within the CIM ONE framework

2026 will be the year of the transition of digital measurement within the CIM ONE framework, with the integration of panel measurements (TAM Router, cross-media panel) and the expansion of measurement (streaming platforms, social networks, ...).

With this in mind, the Technical Committee Internet will evolve into the TC "Digitalization," with an expansion of its scope to all digital-related questions, which will occupy a central position within the new CIM ONE framework. The most important themes for 2026 will be:

- Developing a new personification modelling and profiling of census and other device data whereby the scope can be expanded from apps and sites alone to routers (with GfK), return-path data, mobile (telco) data, audio and video logs ...
- The integration of online and offline data into the new Total Video, Total Audio and Total Publishing currencies and into one cross-media modelling and consistent output.
- Investigating complementary or alternative census data collection (1st party data, server-to-server integration)
- Defining adapted metrics, in alignment with those of online media.
- Integrating CIM data and models into the computing engines of large marketing models of agencies and advertisers.



121

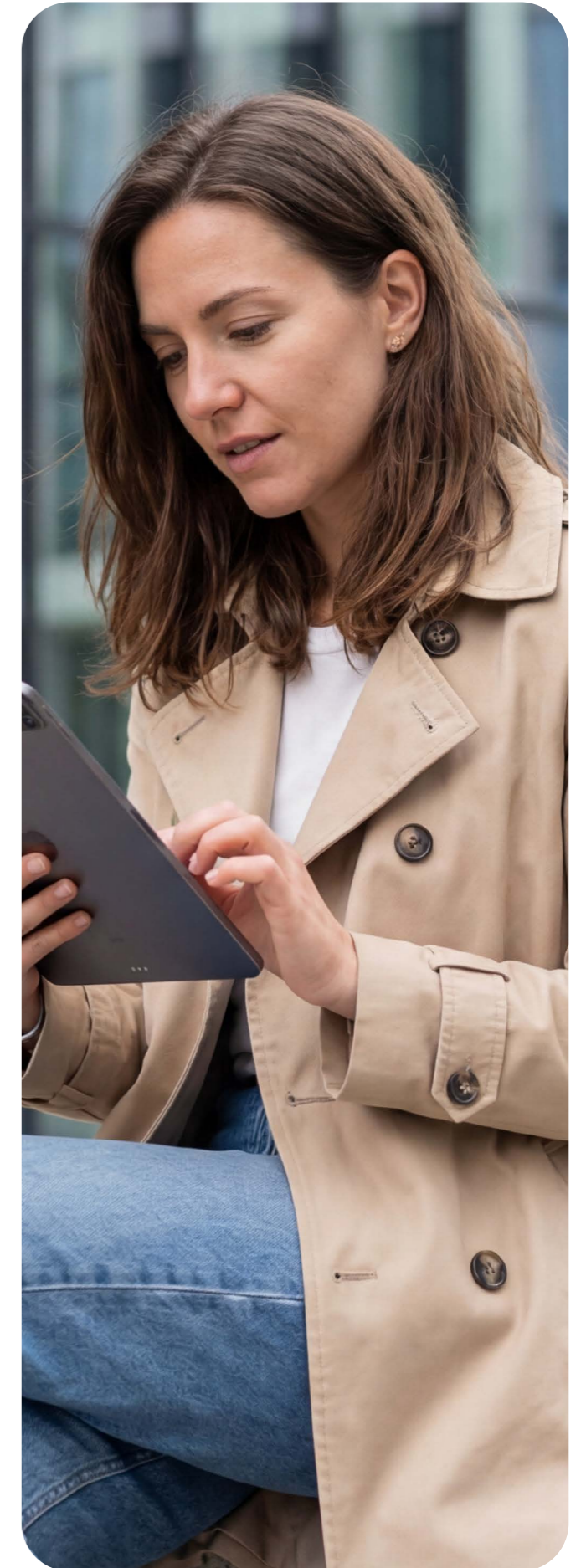
published nodes

3.166.918.132

streams for 28 players

28.567.379.338

page views for 93 apps and sites





DATA SCIENCE

07

# The report by Aytug Altin, Senior Data Scientist

In 2025, my focus was on strengthening the technical foundations and increasing the degree of automation within our data operations, in support of the further rollout of CIM ONE.

An important part of this was setting up and structuring the Azure environment. In doing so, I contributed to building a robust data architecture with a clear separation between storage, processing and reporting, including secure access via Key Vault and automated data flows.

In addition, I integrated Git within Databricks to professionalize version control, collaboration and deployment. As a result, we work with a transparent development structure, controlled releases and reproducible pipelines.

For the Internet Results, I developed a specific Luxembourg dashboard in Power BI, focusing on clear KPI structure, consistent definitions and user-friendly filtering. This dashboard makes it possible to analyse Luxembourg data autonomously and efficiently within the same methodological logic as the other markets.

Finally, I further automated the processing of AOD (Audio On Demand). Here, the entire flow – from data intake to reporting – was streamlined with the aim of eliminating manual steps, reducing errors and shortening the lead time.

These projects contribute to a stable, scalable and future-oriented data environment.





LISTEN

08

# The report by Joëlle Defossez, Project Manager and Mathias Maesschalck, Research Executive

Listening to audio within CIM is measured via no fewer than three different specific studies, reflecting the strong position of the radio medium within the Belgian market. Even in this medium, digitalization continues. Reporting on the use of audio players via the CIM Internet study is therefore a useful addition to these specific studies.

## The Strategic Committee



### Members

Thijs Vanderhaegen, chairman (VRT), Jo Snoeckx (DPG Media), Julien Faucheux (RTBF), Kim Beyns (NGroup), Luc Eeckhout (UBA), Marco Marini (RTL), Sandrine Penninckx (RMB), Stéphanie Piret (Omnicom Media Group), Veerle Hellemans (VAR)



5

meetings in 2025

## The Technical Committee



### Members

Stéphanie Piret, chairwoman (Omnicom Media Group), Dany Deroncourt (RTBF), Gaëtan Doucy (WPP Media), Jo Snoeckx (DPG Media), Julie Badisco (VRT), Marco Marini (RTL), Stefan Delaeter (VAR), Soraya Boudaoudi (Publicis Group)



6

meetings in 2025



## CIM Audio Time (CAT) Conducted by Ipsos

01

The CIM Audio Time study is an annual study that provides an overview of the consumption of audio content in all its forms. Its goal is to identify all types of audio and radio consumption, measure their distribution and volume, and calculate the 'share of ear' of each audio type. The study is based on a survey of 4,000 respondents aged 12 to 74, who, in addition to the questionnaire, also fill in a diary of the previous day. Recruitment was carried out via Ipsos' Online Access Panel (OAP) and the CIM MediaWatch panel, during the period September–November 2025.

## Radio Stream Monitor (RSM) Conducted by NeuroMedia

02

This is the measurement of Radio over IP traffic. Stream volumes are measured using log files generated by the streaming servers of the stations.

## Radio Audience Measurement (RAM) Conducted by GfK

03

The RAM study, on the basis of which CIM publishes reach, listening duration, and market shares of participating stations, is based on a continuous survey reported in three waves of 8,000 observations per year. The study uses a hybrid recruitment mix: 50% of respondents are recruited face-to-face, 30% via online access panels, and 20% by phone using the random digital dialling (RDD) technique. The reference universe includes all individuals aged 12 and over living in Belgium.

## Audio On Demand (AOD) Conducted by NeuroMedia

04

This study measures the number of unique streams and downloads of audio on demand (time-shifted radio listening) and podcasts. The methodology is similar to that of the RSM study, as the measurement is based on server logs.

# The 2025 files

In 2025, CIM organized the fifth wave of CIM Audio Time. The results were published in February 2026.

The RAM study follows entirely the methodology of the previous year. In 2025, the results of 3 waves were published:

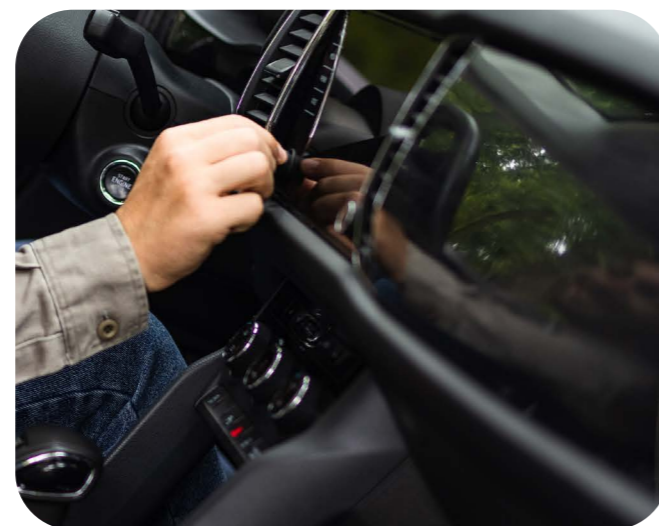
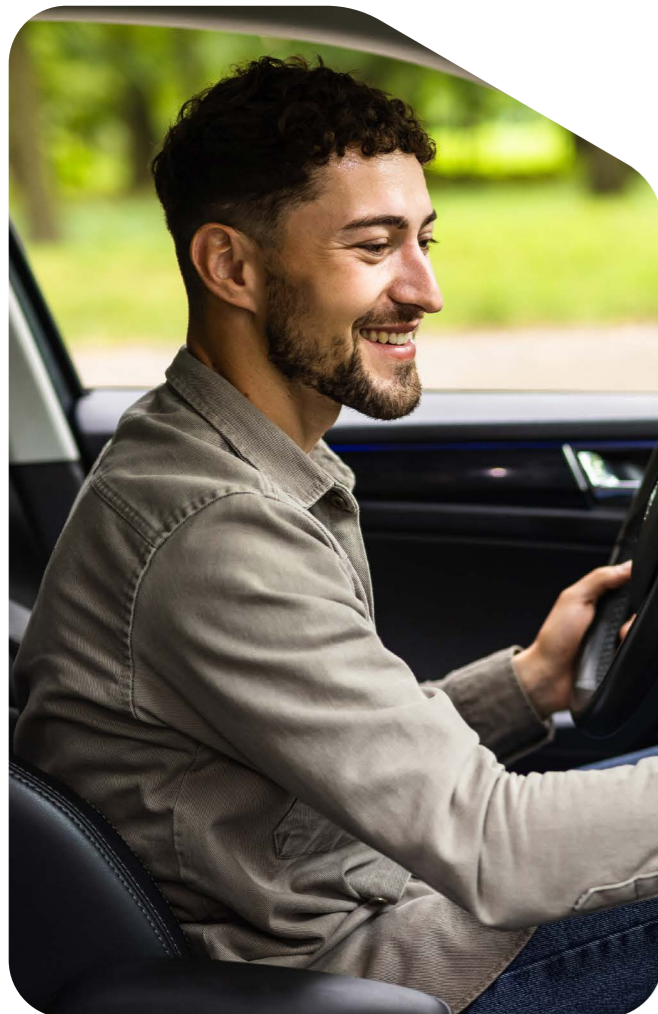
- RAM September–December 2024, in February 2025;
- RAM January–April 2025, in June 2025;
- RAM May–August 2025, in October 2025.

In 2025, the AOD study was published for the first time. It thus complements CIM's existing audio studies and includes measuring podcasts and time-shifted radio listening. The publication started in March with the results of the spring. Since then, the dashboard has been updated monthly with a new ranking, giving users continuous and up-to-date insight into the reach and popularity of audio on demand content and podcasts.

The Strategic Committee has established its expectations regarding the evolution of the RAM study within the framework of CIM ONE and chose a hybrid measurement (passive measurement and calibration study) to ensure a transition that preserves the balance of the radio advertising market.

The Strategic Committee defined the expected input and output for the Total Audio section of CIM ONE.

The Strategic Committee also validated the implementation of watermarking as an additional technology within the framework of passive measurement.



125,7

million unique streams and downloads registered (Audio on demand)

359.890.791

Active sessions  
(sessions of at least 60 sec)  
(Radio Stream Monitor)

3h49'

Stable daily radio listening  
(Total radio RAM)

## New in 2026

- The next publication of the CAT, fieldwork September–November 2025, is scheduled for early 2026.
- The next publications of the RAM are scheduled for February, June, and October 2026.
- The Technical Committee and the Strategic Committee will closely monitor the numerous audio developments within the framework of CIM ONE: the implementation of watermarking, the development and validation of the calibration model, the recruitment and first results of passive radio measurement for the south of the country, and the start of the radio calibration study after the last RAM wave.



HIGHLIGHT 2025

02

# Audio on Demand



In March 2025, CIM launched Audio On Demand, the first measurement of podcasts and time-shifted listening.

In the Audio On Demand study, CIM reports monthly on the number of streams and downloads, adding an extra dimension to the existing measurements of audio content.

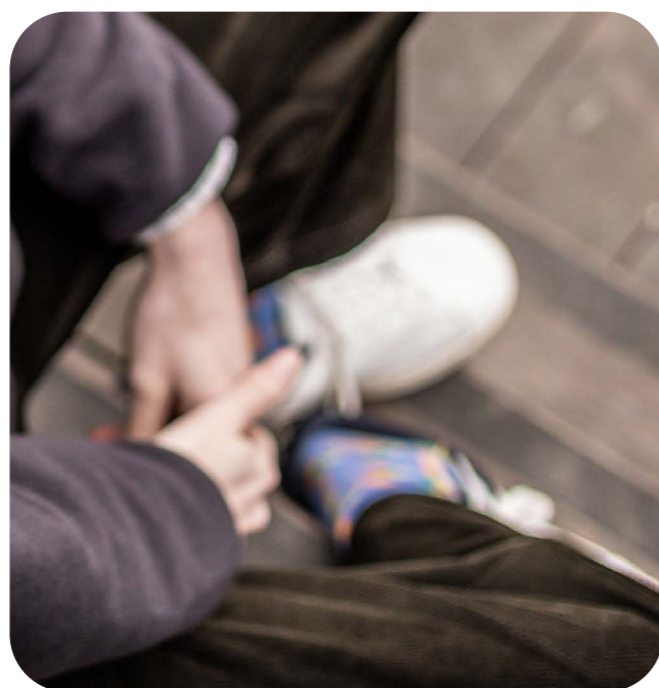
CIM analyses, in collaboration with NeuroMedia, more than 12 million unique streams or downloads each month from over a thousand programs, covering nearly 80,000 episodes.

The first phase of the study contained data from the stations participating in the radio study.

The podcasts of De Tijd and L'Echo from publisher Mediafin were added to the figures in March 2025.

Mediahuis was added to the figures from October 2025.

The ambition remains to make the study as complete as possible by including other publishers.



## Current affairs and commentary dominate, with summer exceptions

The CIM 'top 100' at program level shows a consistent pattern for 2025: current affairs and commentary formed the foundation of the most listened-to programs. For most of the year, they accounted for at least half of the top 10 programs in both the North and South. History and human interest filled the higher regions, while popular genres such as crime and sports were occasionally present.

Exceptional events broke this pattern. The summer brought a sporty wave: the cycling celebration of the Tour de France pushed race programs such as 'Sporza Koers' and 'On connaît nos classiques' to the top. Other holiday periods also brought more variety in listening behaviour.

With the return of the school year in September, however, news programs resumed their dominant position in both regions. Listeners returned to their familiar routines, and this trend remained stable until the end of the year.

## Reliable measurement via server data

The Audio On Demand figures are collected via server-side registration: NeuroMedia analyses daily the log files of the participating broadcasters and publishers. This methodology guarantees accurate and reliable listening figures, independent of cookies or user registration. The data are enriched with metadata such as program information.

The study fits within the broader CIM strategy to make media usage in Belgium more transparent and measurable through the use of big data.

The figures can be found on our website.

More details on the methodology are on our website.

**80 000**  
Episodes  
/month

**275 000**  
Episodes  
/year

**8000**  
Programs  
/year



READ

09

# The report by Cecilia Versmissen, Project Manager

There are two CIM press studies: the Press Circulation Audit, with the distribution of press titles, and the Belgian Publishing Survey (BPS), which reflects the reach of press titles across all platforms. The design and monitoring are entrusted to the Strategic Committee Crossmedia, Publishing & Digital (CPD) and the Technical Committee Publishing.

## The Strategic Committee CPD



### Members

David Lecouvet, chairman (Mediabrand Belgium), Annelore Van Hove (Delhaize), Bart De Pauw (WPP Media), Bernard Cools (Space), Coralie Dalcq (Alken Maes), Edouard De Witte (Rossel), Gaetano Palermo (Engie Belgium), Gauthier Piret (Transfer), Gert Delgouffe (Bauer Media Outdoor), Joris De Ryck (Roularta), Koen Van Rhijn (Billups), Luc Eeckhout (UBA), Matthias Langenaeker (Omnicom Media Group), Patrick Van Dijck (Brightfish), Rikkert Van Loo (Ads & Data), Sandrine Penninckx (RMB), Sascha Van Der Borght (MMS Communications Belgium), Sébastien Reys (EssenceMediacom), Sofie Van Craen (Zigt Media), Sophie Vanderwinkel (IPM), Thijs Vanderhaegen (VRT), Tim Van Doorslaer (DPG Media), Veerle Colin (JC Decaux)



8

meetings in 2025

## The Technical Committee Publishing



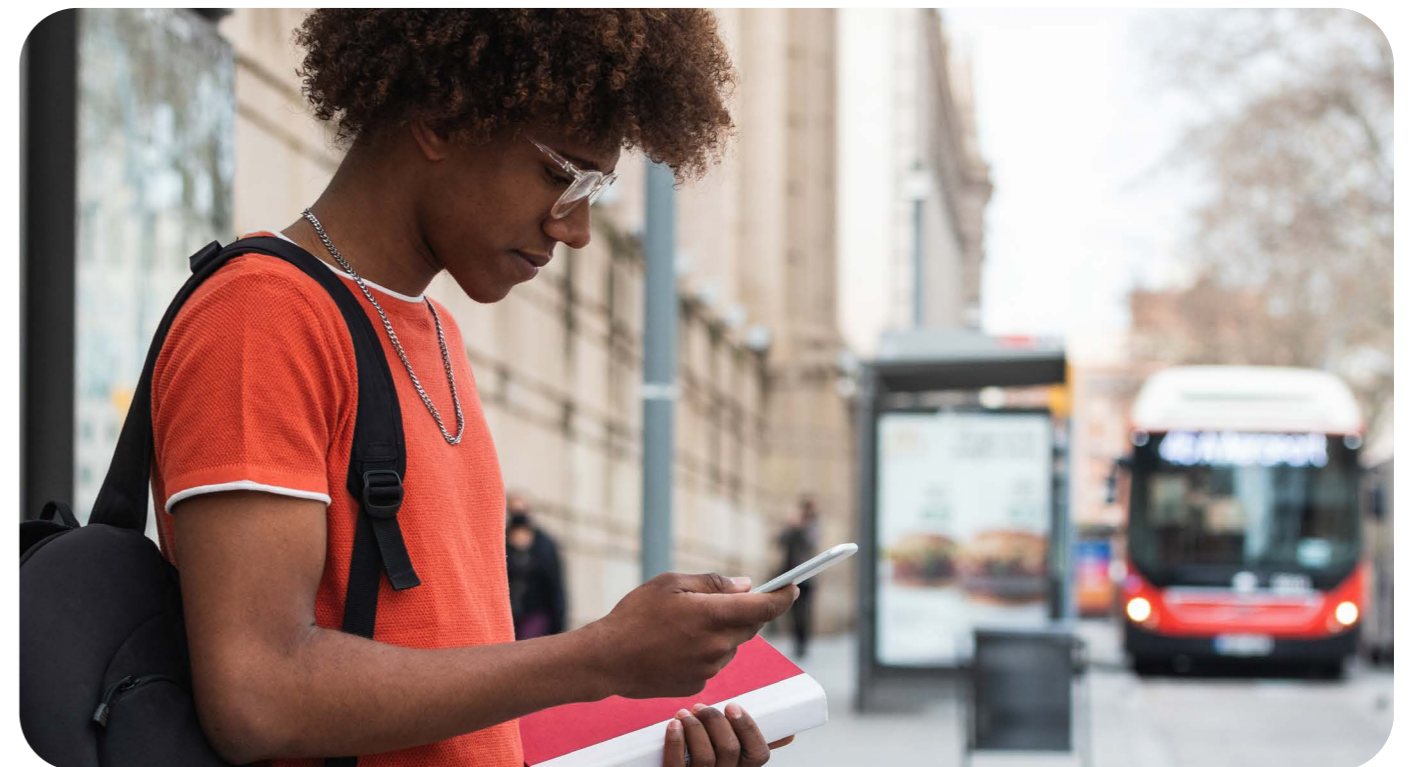
### Members

Bernard Cools, chairman (Space), Francine Kenler (Rossel & Cie), Françoise Fauchaux (Ads & Data), Ilse Peeters (DPG Media), Isabelle Rotsaert (Dentsu), Laurant Van Cutsem (Mediafin), Louise Van Buynder (Roularta), Remi Boel (Omnicom Media Group), Thierry Hottat (IPM)



5

meetings in 2025



# THE STUDIES IN BRIEF

01

## Press Circulation Audit Conducted by MICC

The CIM Press Circulation Audit ensures that the circulation declared by the publishers, both paid and other distributions of participating titles, are verified and 'certified as genuine'. This is carried out by an external agency (MICC), under the supervision and coordination of the CIM team.

02

## The Belgian Publishing Survey (BPS) Conducted by Ipsos

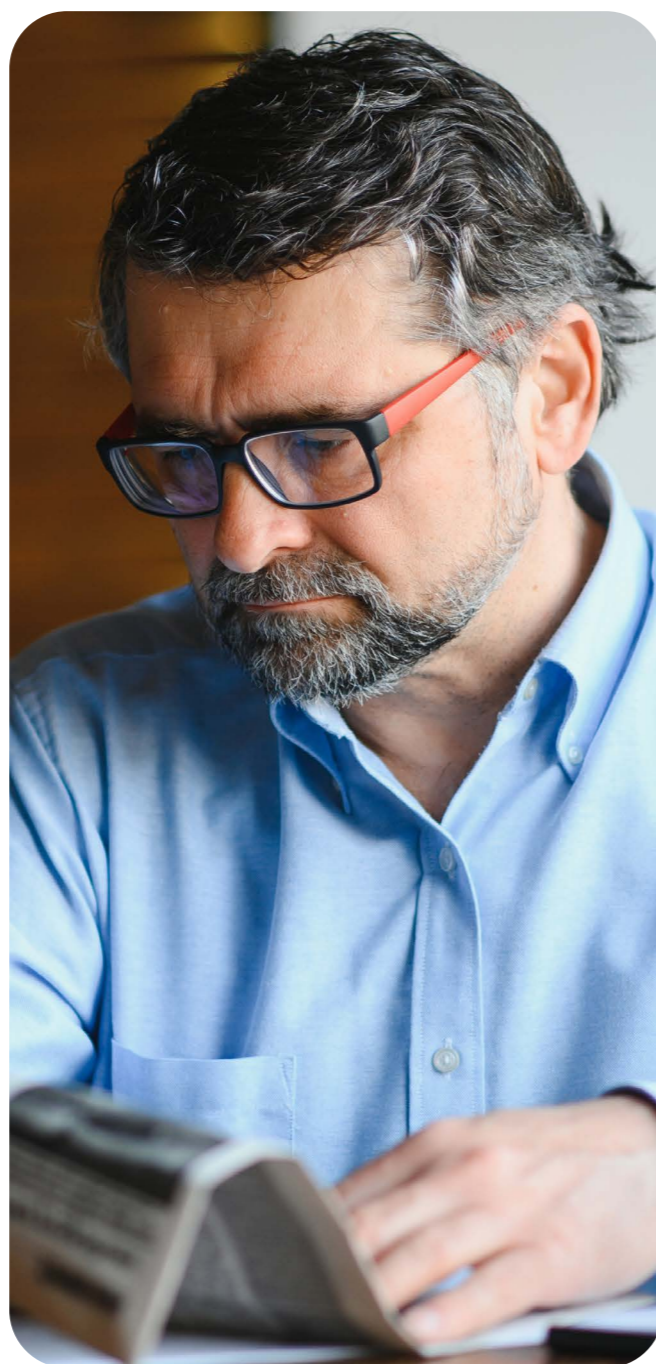
The CIM press reach study, the BPS, measures the reading of press titles at all reading moments, both on paper and in the digital edition. The BPS currently provides three reading indicators: one for paper + digital (PDF) versions, one for the web versions (website, app, video), and finally the 'Total Brand', which encompasses all three platforms (paper, digital edition, and web). The published web and Total Brand results are based on the merger of site, app, and video data measured in the CIM Internet study with the press data.

# E STUDIES IN BRIEF /



# The 2025 files

- The BPS results from the 2024–2025 fieldwork were published on 15/10/2025.
- The role of the CrossMedia committee, which was transformed into the “Recruitment & Surveys” committee, was expanded to monitor the coherence of recruitment and questionnaires of all CIM studies within the framework of CIM ONE.
- Monitoring of the new design of the press study, with the first publication of results from this renewed design.
- Based on the experience gained during this first fieldwork according to the new design, the committee made some additional optimizations to the questionnaire and the organization of the fieldwork.
- Monitoring of the Press Circulation Audit with simplifications in the reporting categories.



**34 million**

Average number of copies of paper newspapers and magazines, measured by CIM, distributed monthly.

**93,7%**

of Belgians consult at least one press brand each month.

**56,1%**

of Belgians consult a daily newspaper brand every day.

## New in 2026

- The next publication of the BPS fieldwork 2025–2026 is scheduled for the fourth quarter of 2026.
- Monitoring of the measurement of online press brands within the XMP panel, as well as the first results of the French-speaking part of the panel.
- Determination of principles and monitoring of developments for the integration of BPS results into CIM ONE.



## The Technical Committee Cinema



### Members

Nathalie L'Hoir, chairwoman (Mediabrand, UM), Sandrine Penninckx (RMB), Patrick Van Dijck (Brightfish), Hélène Bairiot (Dentsu), Mathilde De Maere (Havas)

CINEMA

After several years of absence, since the end of 2024 CIM has been preparing the return of a cinema study. The goal of this new study remains to map the average cinema audience in Belgium. In addition, new dimensions are being added, such as seasonality.

## The 2025 files

In 2025, the committee worked on the optimization and management by CIM of a sector study, as well as on the development of planning software linked to this study. For technical and strategic reasons, it was ultimately not possible to produce and publish results from this study for the advertising market.

The cinema members of CIM (Brightfish, RMB, as well as the agencies) therefore started drafting a new terms of reference to launch a completely new study that will meet the needs of the market.

## New in 2026

The new RFP will be sent to potential partners in the first quarter of 2026, and the final choice must be made in the second quarter.

Depending on the start date of the new study and the final set-up, the timing of the publication of the first results can then be determined with greater precision.



## OUT OF HOME

10

# The report by Joëlle Defossez, Project Manager

The CIM Out Of Home (OOH) study, which measures the reach of billboards on streets, in train stations, and in the Brussels metro, is a hybrid study. It combines mobility data from classical interviews and big data with information on the placement of boards from participating agencies.

The main challenge is the renewal of the study and the integration of new data and technologies to best meet the market's needs in measuring digital out of home (DOOH), and in particular programmatic buying. This new digital offering is indeed an important reason for the current growth of investments in the out-of-home medium.

## The Strategic Committee



### Members

Veerle Colin, chairwoman (JC Decaux), An-Sofie Van der Maelen (Mediabrand), Geoffrey Dejean (Belgian Posters), Gert Delgouffe (Bauer Media Outdoor), H el ene Bairiot (Dentsu), Jos Van Campenhout (Billups), Thomas De Greef (WPP Media)



6

meetings  
in 2025

## The Technical Committee



### Members

Jos Van Campenhout, chairman (Billups), Christophe Guisset (Mediabrand), Elodie Roland (Havas), Geoffrey Dejean (Belgian Posters), H el ene Bairiot (Dentsu), Sabrina Van Impe (JC Decaux), Thomas De Greef (WPP Media), Val erie De Coster (Bauer Media Outdoor)



7

meetings  
in 2025



# THE STUDY IN BRIEF

## CIM Out Of Home (OOH)

Conducted by, among others, MGE Data and BE-MOBILE

The current OOH study is based on a hybrid methodology and consists of three components:

- 01 Traffic modelling**, in which the travel patterns of the Belgian population for an average week are first defined based on CIM and public mobility studies, telco data, and mobility statistics. Then the exact routes for each trip are generated on the OSM road network.
- 02 Inventory mapping | visibility calculation (VAI)**  
All boards, with their specific characteristics, are mapped in OSM cartography. Visibility (VAI) is calculated for each panel according to size, position, distance from the road, and the lighting or movement system of each panel.
- 03 Visibility Adjusted Contacts (VAC)**  
Traffic modelling and VAI data are combined to calculate Visibility Adjusted Contacts of individual billboards and networks, for all OOH universes (street, metro, and train stations).



# STUDY IN BRIEF/ TH

# The 2025 files and new in 2026

In 2025, the results of a new wave were published, based on the same mobility data and taking into account an update of the billboard inventory:

**CIM OOH 2025-1**  
in August 2025

In addition to the publication of new results, several projects were carried out to improve the current study:

- Management of the call for tender issued at the end of 2024, with the evaluation of the offers from the institutes to choose the new partner for the next mobility modelling. As part of this selection process, a Proof Of Concept was organized with one of the institutes to evaluate the technical and methodological aspects of the proposed technology and thus provide an objective basis for the choice of the final supplier.
- Development and evaluation of a new method for calculating reach build-up (accumulation method) to better meet the requirements of programmatic buying.
- After the publication in 2024 of the first results of "Shopping Malls & Retail" in the OOH study, preparation of an update of the data to include new points of sale, with a view to publication in 2026.
- Determination of the participation conditions for new agencies in the organization and financing of the OOH study.

**188 million**

modelled trips per week

**4 universes**

(roadside, stations, metros, retail)

More than

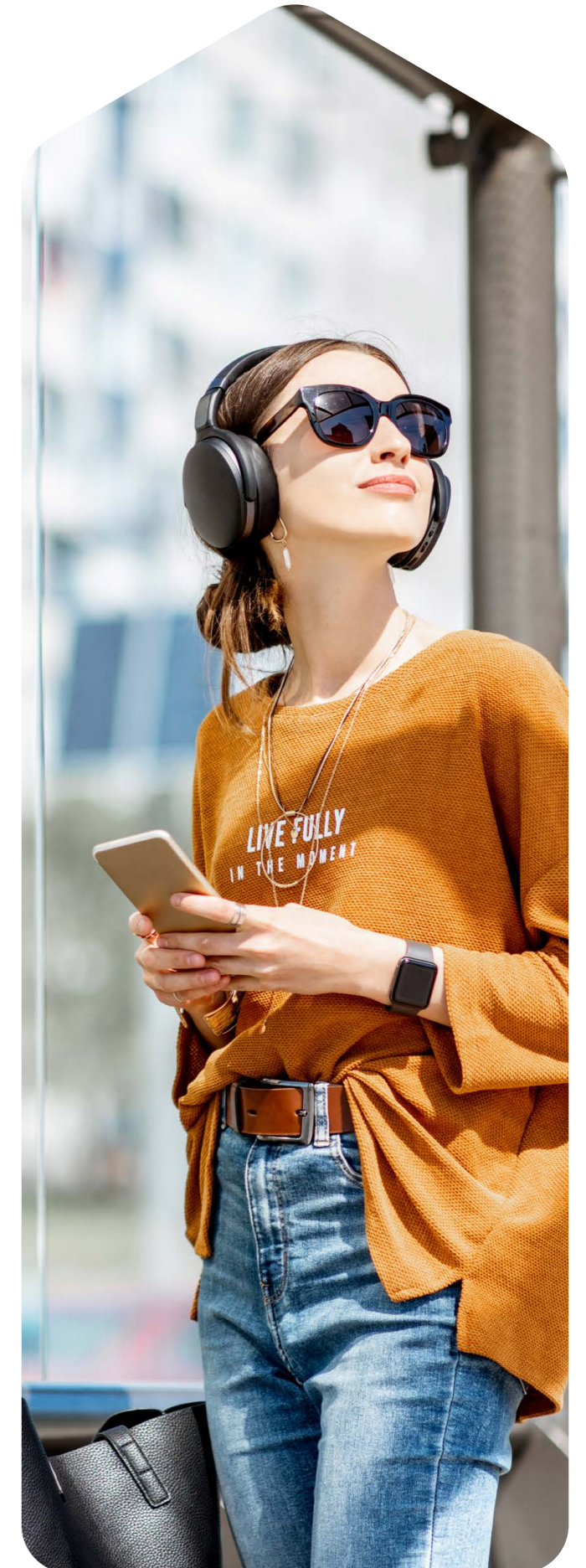
**40 000**

measured panels

## Renewal of the study

In 2026, the tender will be further followed up, starting with the evaluation of the Proof of Concept. This will serve as the basis for the choice of the new partner responsible for the next mobility research.

The Technical Committee will monitor the launch of this study, with particular attention to the use of new data sources and the development of the new modelling.





WATCH

11

# The report by Robin Florin, Media Director and Stephan van Weddingen, Project Manager

The CIM Television study consists of two parts: the measurement of television reach (CIM TAM study) and the identification and timing of TV broadcasts, promotion, and advertising (CIM Horodatage).

## The Strategic Committee



### Members

Tim Van Doorslaer, chairman (DPG Media), Ariane Debeur (RTL Belgium), Benoit Pissoot (WPP Media), Bernard Cools (Space), Gauthier Piret (Transfer), Inne De Swaef (Ads & Data), Jo Martens (VRT), Luc Eeckhout (UBA), Quinten Galle (DPG Media), Remi Boel (Omnicom Media Group), Sandrine Penninckx (RMB)



7

meetings  
in 2025

## The Technical Committee



### Members

Remi Boel, voorzitter (Omnicom Media Group), Ariane Debeur (RTL Belgium), Bernard Cools (Space), Hanne Henkens (Zigt Media), Isabel Sanchez (MMS Communications Belgium), Isabelle Rotsaert (Dentsu Belgium), Jo Martens (VRT), Mélusine Naômé (DPG Media), Pieter Berger (EssenceMediacom), Rikkert Van Loo (Ads & Data), Sandrine Penninckx (RMB), Timo Hasaerts (Transfer)



5

meetings  
in 2025



# THE STUDIES IN BRIEF

01

## CIM Television Audience Measurement (TAM)

Conducted by GfK

GfK Belgium is responsible for measuring viewing figures: using a panel of 1,500 households equipped with a people meter, TV viewing behaviour is mapped.

02

## CIM Horodatage

Conducted by Nielsen

Nielsen Belgium organizes the identification, coding, and time logging of TV broadcasts, self-promotion, and advertising for channels subscribing to the Grande Audimétrie /Grote Audimetrie.



# STUDIES IN BRIEF/

# The 2025 files

## The cross-media measurement

The first results of the Flemish XMP study by Ipsos were published internally. These include measurement of traditional television via the Mediacell+ meter and registration of all digital video platforms with the RealityMine meter, both integrated into a smartphone app for 1,500 panellists.

The results provide more insight into the similarities and differences with the results of the CIM TAM and CIM Internet measurement. Based on these data, the method can be refined to integrate these different sources into CIM ONE, which aims to create a new super-complete Total Video 'currency'.

The study scope is significantly expanded. A total of 3,750 platforms are now measured versus 120 channels in the old television study.

## The router meter

In the television panel managed by GfK, a digital meter, called the router meter, was also installed. By the end of 2025, almost three-quarters of panel households had their complete digital media behaviour mapped. This provides insight into the 'other usage' of the large television screen at home, with a focus on various streaming platforms.

## ToVA Strategic Planning

The Connected TV (cTV) inventory (Broadcaster Video On Demand (BVOD), YouTube) was added to the ToVA strategic planning tool. This addition is based on a combination of data from the CIM Cross Platform Survey (CPS, already used to combine TV and digital data to create the ToVA reach) and the cTV traffic measured for these platforms in the CIM Internet study.

## ToVA Post Buy

It was decided to extend the ToVA planning tool with a post-buy solution. This will allow campaign balances to be made for the combination of linear TV, BVOD, addressable TV, and online video. After a Request for Proposal, the contract to build this system was awarded to the institute DataBreeders, which had previously developed similar solutions in Finland and Italy.

## Return Path Data (RPD)

The Proof Of Concept (POC) regarding the use of Return Path Data from telcos such as Proximus and Telenet was completed with clear conclusions. The question was whether this data could be integrated into the TV currency. The results of this POC, conducted by Ipsos, allowed this question to be answered affirmatively.

A model is possible that makes the results of the television study significantly more stable, especially for thematic and regional channels and for general channels in time slots with lower viewing density. The challenge, however, is the regular and more complete delivery of data by the operators. CIM is engaging with them regarding this.

## The horodatage

At the beginning of 2025, it was still intended to extend the horodatage contract with Nielsen by two years, as contractually possible. The horodatage contract concerns the coding of television programs in a broad sense, including checking at what time scheduled programs, advertising blocks, and spots were broadcast.

After a restructuring was announced in spring under the Renault law at Nielsen Belgium (the second in a row), it was decided that CIM had to issue a tender. This was completed during the summer. At the end of August, the CIM Watch Strategic Committee and Technical Committee unanimously – with approval from media, agencies, and advertisers – decided to award the project to GfK and Neuromedia (the latter for metadata harmonization).

A one-year extension with Nielsen was considered riskier than this switch, and a three-month overlap period was rejected by GfK. There was no other option than to switch to the new suppliers within a very short timeframe.

# 3.088.331.926 streams

Of all linear TV viewing in 2025, **71%** was watched live and **29%** time-shifted up to 28 days after broadcast in the North. In the South, this was 75.5% live and **24.5%** time-shifted.

The top-scoring program of 2025 in the North was De Mol with **1,438,967** viewers (4+, Live+28 including web rating) and in the South the Nations League football match between Belgium and Ukraine with **647,226** viewers. Both programs were broadcast on March 23, 2025. In other words, a top TV day!

# New in 2026

## The horodatage

The start of the new horodatage by GfK from January 1, 2026, was particularly problematic. There was no problem with the viewing figures themselves, for example with the calculation of channel and time-slot market shares, as these do not depend on the horodatage.

However, new programs and schedules could no longer be evaluated, top lists were no longer published, and agencies had no possibility to evaluate or optimize their advertising campaigns, based on the latest audience figures. On January 20, CIM decided to install a 'War Room' at GfK, which allowed it to have detailed insight into what went wrong and to influence organization, staffing, and priority-setting to resolve this crisis. After a rebriefing of software developers at GfK by CIM itself, programs could be delivered to the market in a regular and continuous manner from January 30 onwards. Work continued on the gradual delivery of advertising blocks and spot lists and the correction of back data.

## ToVA Post Buy

A first ('beta') version of the system is expected in the second quarter of 2026. It will combine linear TV data from GfK with data from the ad servers of Ads & Data / VAR, DPG, and RMB. Transfer will join later.

The company Streamhub is developing a reporting tool to facilitate the creation of balances. A 'Creative ID' taskforce has also been established to standardize the identification of creatives across all video platforms, enabling campaign balances of total video campaigns on both online and offline platforms.

## RPD

Discussions with operators regarding data delivery are ongoing. The new CIM ONE production system already provides for the integration of such data.

## Total Video

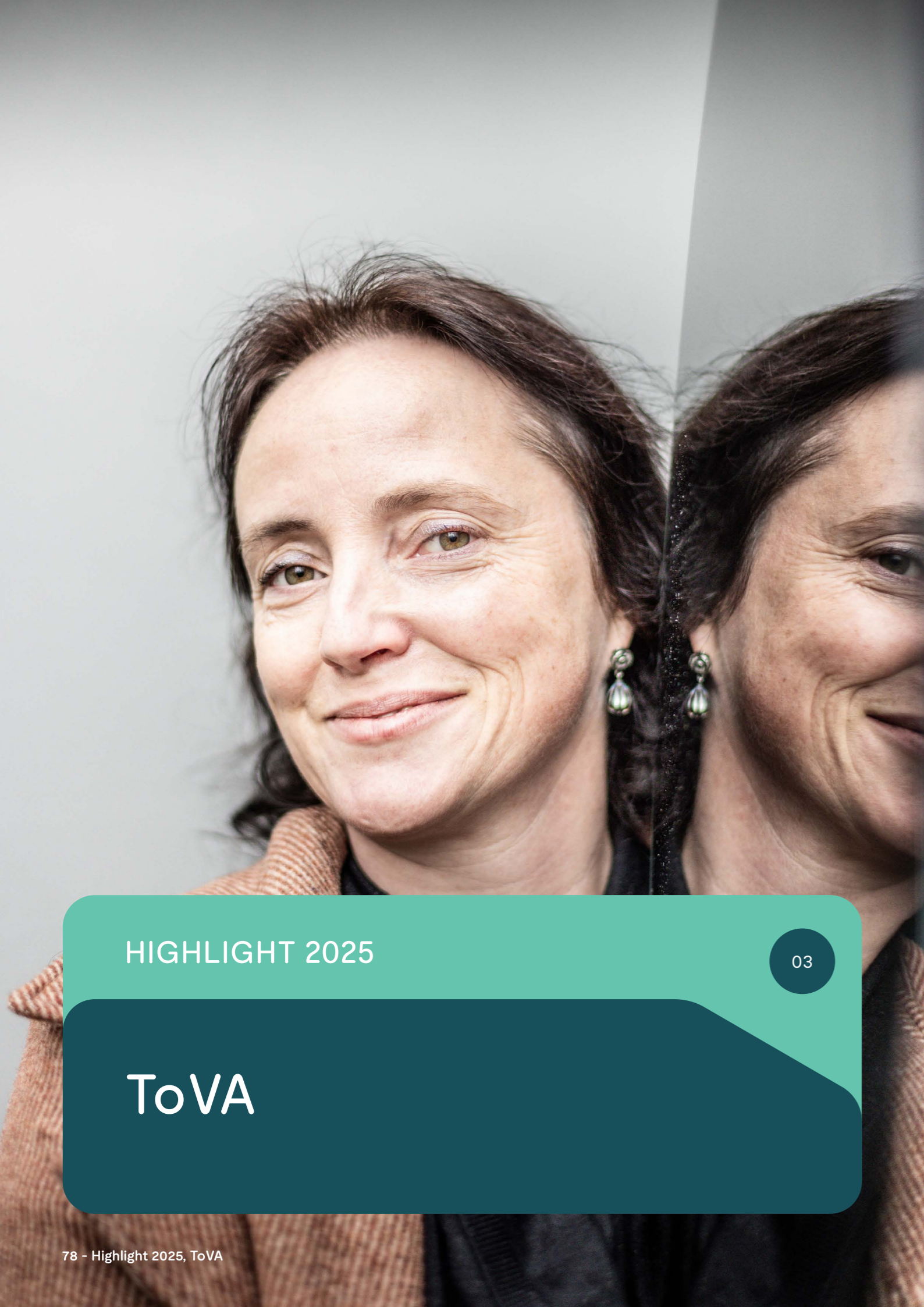
2026 is also a transition year for video towards CIM ONE. The creation of the new Total Video currency was awarded to GfK, which must deliver it by January 1, 2027. It will include data from the TV panel and the XMP panel, from the router meter installed at panellists' homes, and from the RealityMine smartphone meter used at home and on the go. The internet census will also be integrated into one modelling and reporting system.

## Software and API

The data from the new video currency will be made available for analysis in existing market software. Suppliers will receive a briefing for this.

A Request for Information (and later Proposal) will also be issued to develop planning software and a CIM API that can deliver data directly into the CIM members' own planning and trading systems.





HIGHLIGHT 2025

03

ToVA

## Robin Florin (CIM) on the newest ToVA developments

(Interview MM – Best of Research 09/09/2025)

Almost three years ago, CIM presented its ToVA to the market, an internally developed planning tool that for the first time combined TV and online video (including YouTube) into a single instrument for Belgian media agencies. To emphasize its practical utility, the institute now wants to highlight a number of use cases.

A good occasion for further explanation by Robin Florin, Media Director at CIM.

**“At the end of this month, it will be time for your second General Assembly, Robin, and in recent months you have not been idle. Among other things, you have been working on your ToVA, launched in 2022. What does that abbreviation stand for again and what exactly does the tool do?”**

“ToVA stands for Total Video Advertising Planner. It is a tool for media agencies and broadcasters that allows them to view video campaigns as a whole, both offline via traditional television and on various online platforms, including local BVOD and YouTube. It is the only tool in Belgium and in many other countries that enables the analysis of total OLV consumption.

The data used comes from both the television and internet studies; both sources are linked via a cross-platform survey, an annual survey on internet and television behaviour.

This allows us to compare traditional GRPs and impressions. It makes it possible to determine, for a planned campaign, what the incremental reach of online versus offline is, or what additional reach CTV provides, and so on.”

**“ToVA was presented to the market three years ago but has since undergone a number of innovations. What are they?”**

“The most important this year is definitely the addition of Connected TV, both for BVOD and YouTube, so that we get a more complete picture of video consumption. On the other hand, there was also the introduction of the JAR method. This is basically a fancy term to say that first-party cookies are used to have more reliable measurements.”

**“To clarify things, you are now presenting a series of videos (\*) to illustrate the application of ToVA. Why?”**

“We thought it useful to highlight several use cases to make the contribution of the different media channels tangible and to emphasize the important share of local players in campaign reach using practical examples.

For instance, one of the videos is dedicated to the analysis of a targeting supplement. You should know that in online video some broadcasters request a supplement to target certain audiences. With ToVA, you can determine in advance how useful that is and what it delivers. Another use case is finding the best balance between TV and online video for a specific target audience.

In total, we have eight examples that can help advertisers and their agencies.”

Discover all videos on the dedicated ToVA page of our website.



## COMMUNICATION

12

# The report by Nicole Lasseel, Communication Manager

## 2025: Communication as a strategic lever

In 2025, CIM explicitly positioned communication as a strategic lever. In line with the 2024 course, CIM evolved toward an “**always-on**” strategy, aimed at continuously informing and connecting all players in the Belgian media ecosystem. Communication around **CIM ONE** strengthened trust in the project and confirmed CIM as a forward-looking player in media measurement.

The content strategy was diversified. New formats – such as **CIM Monthly** and CIM Flash newsletters, LinkedIn carousels (**CIM Moments/Highlights**), longreads (e.g., for the Establishment Survey), and video series (**How-to videos e.g., for ToVA, State Clips**) – brought both rhythm and depth to communication. Initiatives such as the **White Book** (in collaboration with the Advertising Council and PUB) and the **summer quiz** stimulated engagement and involvement in the community. The development of **YouTube playlists** also increased the accessibility of CIM content.

In addition to new formats, **strategic collaborations played** a key role in increasing communication impact. The **State of the Union** event in collaboration with the Advertising Council formed an important sector-wide meeting point. Other initiatives, such as **CIM for Starters, CommPass sessions**, and information sessions on innovation for specific audiences (regulators, PR professionals), increased impact. Internationally, CIM remained active within networks such as **AMC, EMRO and I-JIC**, where participation in congresses and sector initiatives further strengthened knowledge exchange and positioning as an innovative and reliable partner in audience measurement.

Consistent and transparent communication had clear effects. CIM was cited more frequently in

trade media and was increasingly recognized internationally as a progressive player in media measurement. At the same time, growing engagement was observed **among young professionals and starters**.

The built-up momentum forms a solid basis for the further rollout of CIM ONE and the future of cross-media measurement.



## Key own events

**State of the Union 2025** – the largest visibility peak and the flagship event of CIM (co-organization with the Advertising Council).

**CIM for Starters and CommPass CIM Session** (in collaboration with CommPass).

**Action Session** on innovation (with top figures from media and agencies).

**Informative and training sessions for regulators.**

**CIM4PR:** presentation to PR professionals (organized by C-Square).

## Participation in sector events such as:

- The Future of Video (The Media Leader)
- IAB Afterwork
- XMP event

## International presence

Within various international associations:

- **Audience Measurement Coalition (AMC)**
- **EMRO**
- **Euroclub**
- **Iclub**
- **IFABC**
- **I-JIC**
- **Member and Board member of the American Media Rating Council**
- Participation in strategic sessions of the **Halo project of the World Federation of Advertisers** and membership in the technical **HITAG steering group**

# Outlook for 2026

In 2026, communication will be further strengthened:

- The **website** will have smoother navigation and a more modern presentation of data and publications, enabling visitors to find information more quickly.
- **CIM ONE roadshows** will present the project live to members, share key Q&As on LinkedIn, and increase engagement toward the 2027 launch.
- The newsletter will be expanded with the **CIM ONE Update**, periodically communicating the latest developments.
- Move to the new **IHECS** headquarters in September 2026, with further deepening of the relationship with this academic partner.

On November 20, 2025, CIM and **IHECS** concluded a strategic partnership to strengthen media research and better respond to the rapidly evolving media sector. They combine academic knowledge with practical experience in a shared research environment. Students benefit from current sources and practice-oriented methods, while CIM contributes to the training of future media professionals.



website CIM.be:

**120 483**

active users  
(+37% vs. 88,000 in 2024)

Mailing database:

**4278**

contacts (more than double vs. 1,825 in 2024)

LinkedIn community:

**2100**

followers  
(+75% vs. 1,200 in 2024)

## Thought leadership

The collage features several key pieces of thought leadership content:

- Sector**: A red button labeled 'Sector'.
- Hybrid & AI**: A blue report cover titled 'NEW GENERATIONS OF MEASUREMENT AND THE CHALLENGES OF MEDIA MEASUREMENT'.
- Regulators, policy makers & academic**: A red button with this text.
- DEMOCRACY IN ACTION**: A blue report cover with the subtitle 'La régulation des médias sous tous les angles'.
- The Future of Video Brussels**: A blue report cover featuring Koenraad Derudder as the speaker.
- egta EVENTS**: A logo for an event.
- asi**: A red report cover titled 'CIM ONE, the new fully-integrated research framework of the Belgian JIC'.
- Establishment Survey**: A small report cover.
- IAB AFTERWORK 5/17 CONNECTED TV**: A small report cover.
- 2025 International Conferences - Joint Session**: A red report cover.
- RG**: A logo for the Centre de Recherche sur la Régulation des Médias.
- mediapunt**: A logo for the Centre di Ricerca sulla Televisione e gli Audiovisivi (Ce.R.T.A.).

CIM ONE focuses on measuring media usage across all channels and platforms, with the consumer at the centre, rather than traditional medium-specific measurements.

OUTLOOK

# CIM ONE

Robin Florin, Media Director en  
Michael Debels, Research Director



# First of all: what is CIM ONE again?

CIM ONE is the new **cross-media research and measurement system** of CIM, designed to replace all individual media studies with a **single integrated framework**. It focuses on measuring **media usage across all channels and platforms**, with the **consumer at the centre**, rather than traditional medium-specific measurements.

The system is modular and combines panel data from the so-called **ONE Panel** with all kinds of big data **via a data exchange**. The **personification engine** ensures coherent modelling, resulting in a **virtual population** of all Belgian media consumers that can be integrated as a 'large media model' into the planning and trading systems of the members.



# 2025 – What was achieved?

## Strategic roadmap, communication, and sector-wide support

- During **State of the Union 2025**, CIM clarified the vision behind CIM ONE and presented an ambitious roadmap. Throughout the year, **communication efforts toward advertisers, agencies, and media** were invested in, in collaboration with their various associations, to create broad support for the new solution.

## Financing

- CIM stakeholders provided a **guarantee** for the financing of CIM ONE for the next five years. Despite significant savings in existing studies, additional costs remained to be financed, mainly for the use of the smartphone panel and the new production platform. **New financing** rules for these new solutions and additional costs were agreed upon among the members.

## Restructuring within CIM

- Methodological committees and internal structures within CIM were redesigned to promote **cross-media work**.
- The Technical Committee (TC) "Crossmedia" was transformed into TC "Recruitment & Surveys" and now oversees all recruitments, including panels. TC "Internet" received a much broader scope and, as TC "Digitalization," will examine the integration and modelling of all data.
- The CIM team now works with a focus on input or output.

## Building the foundations

- The ONE panel, within which as much media behaviour as possible will be measured among the same consumers, is at the heart of cross-media measurement. It combines the existing TV panel, which measures media behaviour at home, with the new smartphone panel, which adds out-of-home media behaviour. Within the TV panel, the digital router meter was installed in three-quarters of households. The Dutch-speaking mobile panel – largely funded by the Flemish Government – reached the desired 1,500 panellists, and recruitment of the French-speaking panel was started.
- An overlap between the TV panel and the smartphone panel is also created to make it truly one panel. To facilitate this, all recruitments were entrusted to the same institute, GfK.

## Methodological innovations

- For further development of innovative methods, research was invested in, in collaboration with the **Crossmedia Consortium XMC** (especially regarding RPD data, video advertising post buy, and measuring engagement for publishing) and through participation in international working groups such as those of the Halo project of the **World Federation of Advertisers (WFA)**.

# 2026 – What is on the agenda?

## Technical production and start of the integration phase

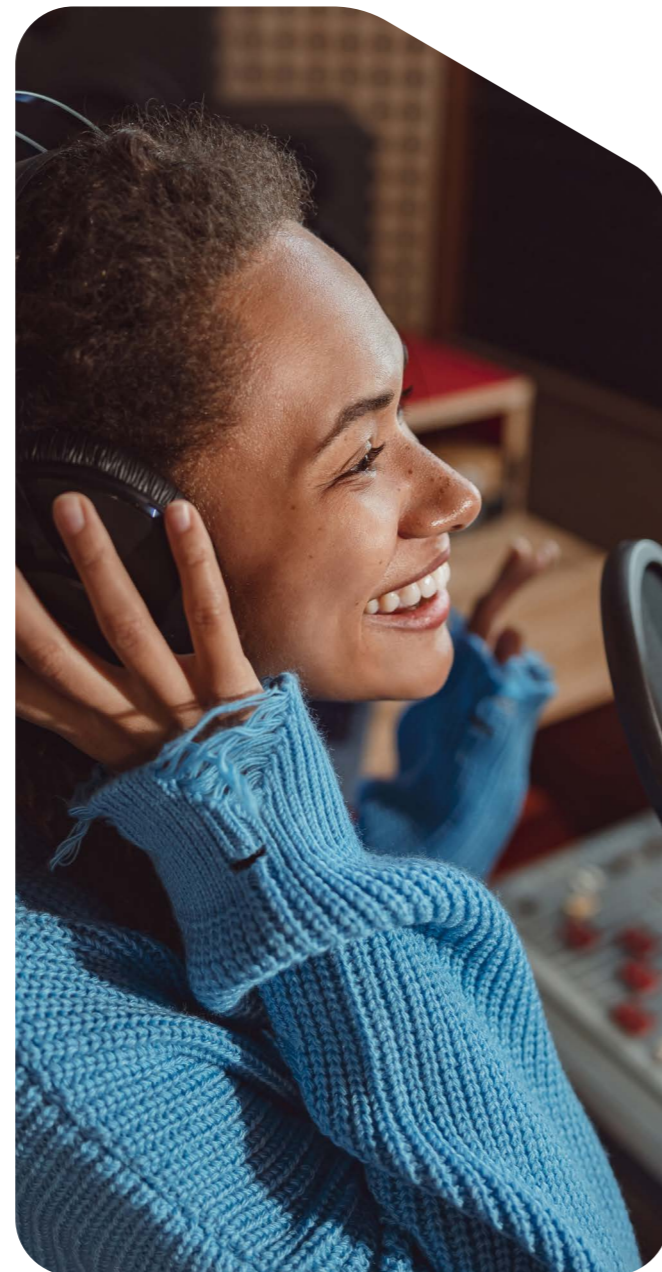
- CIM ONE will be **gradually put into production**: the panels will be integrated by summer, and the new production system will be put into use.
- **Definitions and calculation rules** must be aligned in advance.
- In the first phase of production, existing systems (such as the traditional RAM measurement) will continue to operate, while **new cross-media data is introduced in the new system and a new workflow is developed**.

## Operationalization and validation of the new figures

- CIM ONE must be seen as an **‘operating system’** that continuously converts data flows into actionable insights based on the execution of a single long code. Initially, it is important to ‘industrialize’ the workflows so they can run as automatically as possible. It is essential to provide human and/or automated quality control at every step.
- Before the launch, **validation is needed of the results of the new currency measurements and the cross-media dataset**. This includes extensive testing to ensure the reliability of each element and consistency across the different currencies. Ideally, six months of test and validation data will be available.

## Preparation for full launch

- Planning remains focused on a rollout in **2027** with new currencies for Total Video, Total Audio, and Total Digital, and an integrated cross-media dataset with consumer insights.



# What does CIM ONE mean for the sector?

## For media agencies and advertisers:

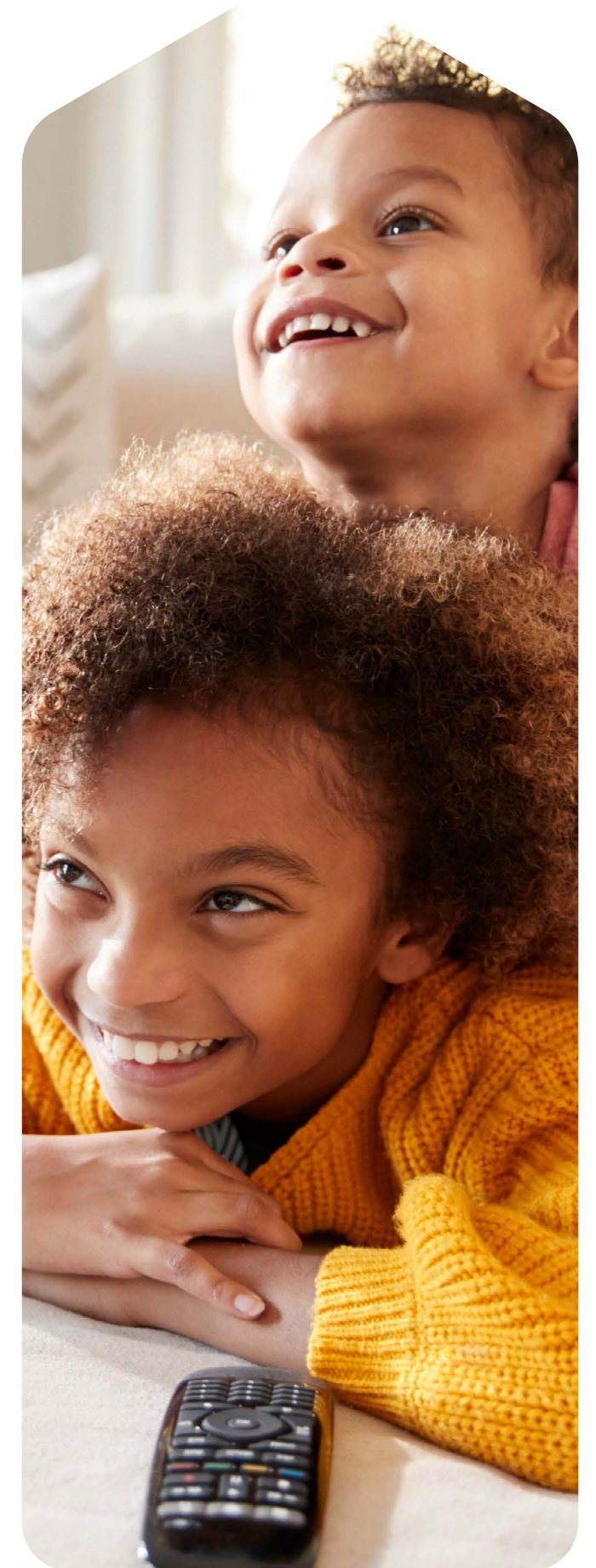
- One coherent view of net reach and duplication across media, and cross-platform and cross-media insights usable for planning and evaluation.

## For media:

- Fair comparisons between traditional and digital channels, with improved visibility for niche content and platform usage.

## For the Belgian media sector as a whole:

- More transparency and reliability, with the ambition to provide Belgium with a future-proof measurement framework.
- So ‘state of the art’ that it can easily be integrated into the latest internationally developed trading and planning systems, making Belgian media visible and easily purchasable.



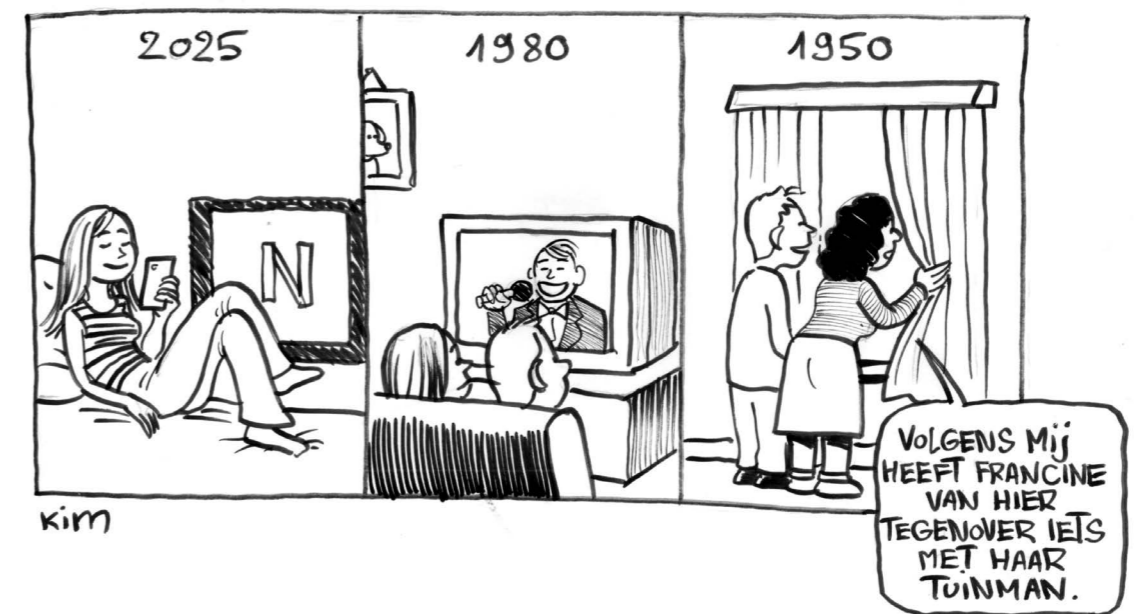
### DIGITAL ACCELERATION



Digital acceleration

"Oh my god, dad still has to look out the window to know what the weather is like!!"

### MEDIA DOORHEEN DE JAREN



Media over the years

"I think Francine, from across the street, is involved with her gardener."



#### Colofon

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The CIM-team

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