



mediaGNOSIS

July - September 2017

The current report is prepared by the Business Intelligence Unit of GNORA Communication consultants and consists of the major findings of the monthly readership and viewership survey conducted by RAI and the monthly TeleBarometer by AGB Nielsen Media Research (Cyprus). Listenership ratings are based on the findings of a survey conducted by the University of Nicosia, IMR and Symmetron.

GNORA offers comprehensive services in Corporate and Political Communication, Public Affairs and Publishing in Cyprus and Greece. It is a specialised consultancy company, which relies on the expertise, experience and networking of its staff to manage and protect the reputation of private and public organisations and individuals.

Since its establishment in 2003, GNORA has managed to win the trust of the largest Cypriot companies, of foreign companies operating in Cyprus, as well as of leading political figures and international businessmen included in the Forbes list.

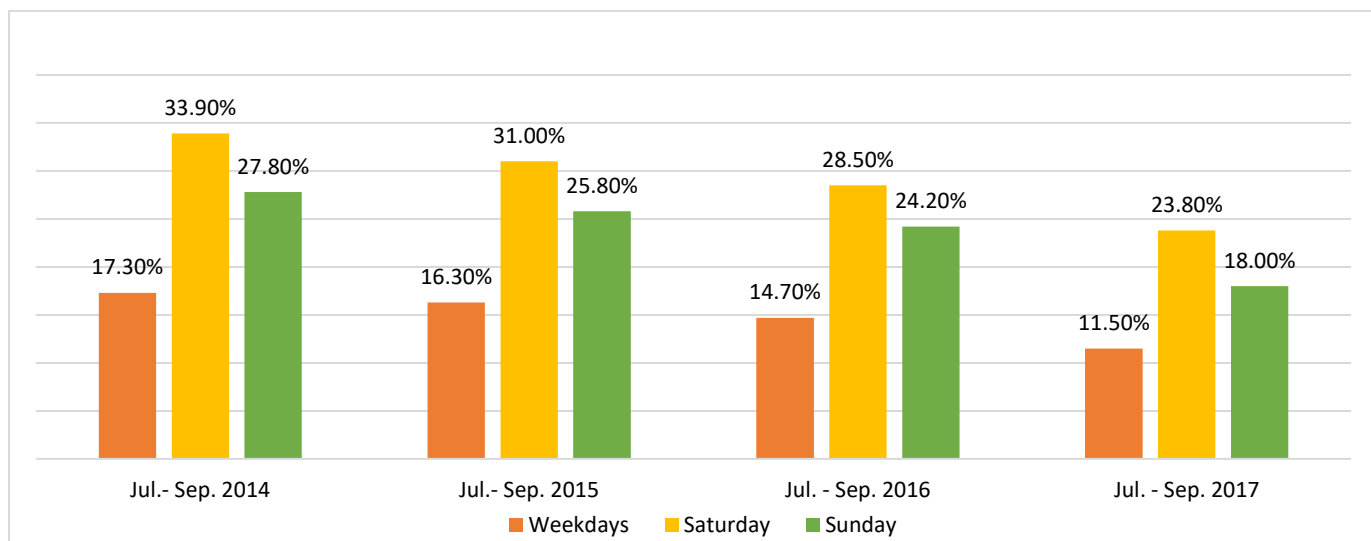
GNORA was declared national champion for Cyprus by the European Business Awards (EBA) 2016/17 in the customer focus category and was awarded the InBusiness Award for the best small and medium sized company in Cyprus in 2013. It is a member of the Fipra network (Finsbury International Policy & Regulatory Advisers – www.fipra.com) the largest European network of public affairs consultancy companies, and has a strategic cooperation on political communication with the Israeli company SHAVIV Strategy and Campaigns – www.strategyandcampaigns.com.



Newspaper readership drops

- Newspapers:** An across the board drop in newspaper readership as the Press struggles to adapt in the new environment.
- Portals:** News portals move in the opposite direction, with an increase in traffic volume.
- Radio:** **CyBC 3** and **Radio Proto** still at the top of the ratings list.
- Magazines:** **TV Mania** remains in the top spot. Slight drop in readership for monthly magazines.
- Television:** **Alpha Cyprus** is rising steadily while **TV One** (former **MEGA TV**) drops in viewership.

Newspapers

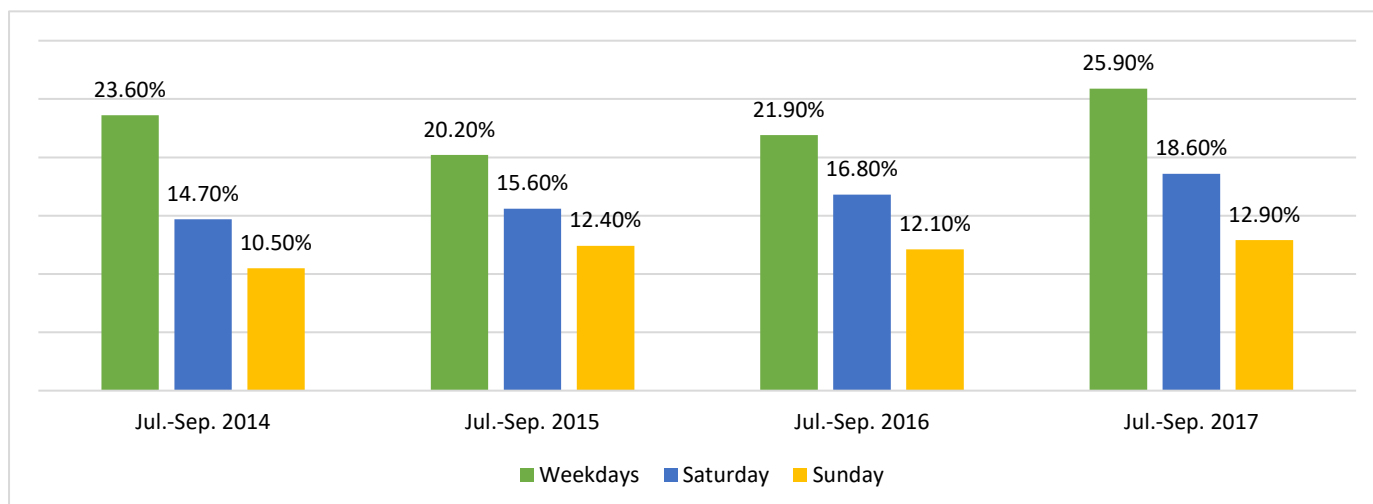


Newspaper readership for this quarter dropped across the board, a reflection of the crisis that plagues the industry. Readership is down on all days compared to last year, with Sundays registering the biggest one (-6.20 percentage points). Readership is also down compared to the previous quarter, (-1.3 pp on weekdays, 2.1pp on Saturday and 1.7 pp on Sunday). **Phileleftheros** takes the first spot, with a 7% readership on weekdays, which constitutes a 0.6 pp drop compared to the previous quarter. **Politis** is in 2nd place (4.5%), a 2.9 pp increase compared to the previous quarter. Both **Alithia** and **Sport Day** reported a slight increase in readership while the now weekly **Simerini** dropped 1.2 percentage points compared to the previous quarter.

| Jul.-Sep. 2017 | Weekdays 11.5% | | Saturday 23.8% | | Sunday 18% | |
|-----------------------|-------------------|--------|-------------------|---------|---------------|--------|
| | % | read. | % | read. | % | read. |
| Phileleftheros | 7 | 50,785 | 17.1 | 123,985 | 10.3 | 74,526 |
| Politis | 4.5 | 32,457 | 5.7 | 41,219 | 3.3 | 23,724 |
| Haravgi | 1.9 | 13,550 | 2.3 | 16,747 | 2.1 | 15,098 |
| Simerini | - | - | - | - | 3 | 21,879 |
| Alithia | 0.6 | 4,471 | 0.7 | 4,897 | 0.7 | 5,281 |
| Sport Day | 0.3 | 2,307 | 0.6 | 4,601 | 0.6 | 4,211 |
| Cyprus Mail* | - | 201 | 0.2 | 1,415 | 0.1 | 1,082 |
| Kathimerini | - | - | - | - | 1.9 | 13,882 |
| Machi | - | - | - | - | 0.1 | 890 |

*Cyprus Mail readership doesn't include non-residents and tourists

Websites



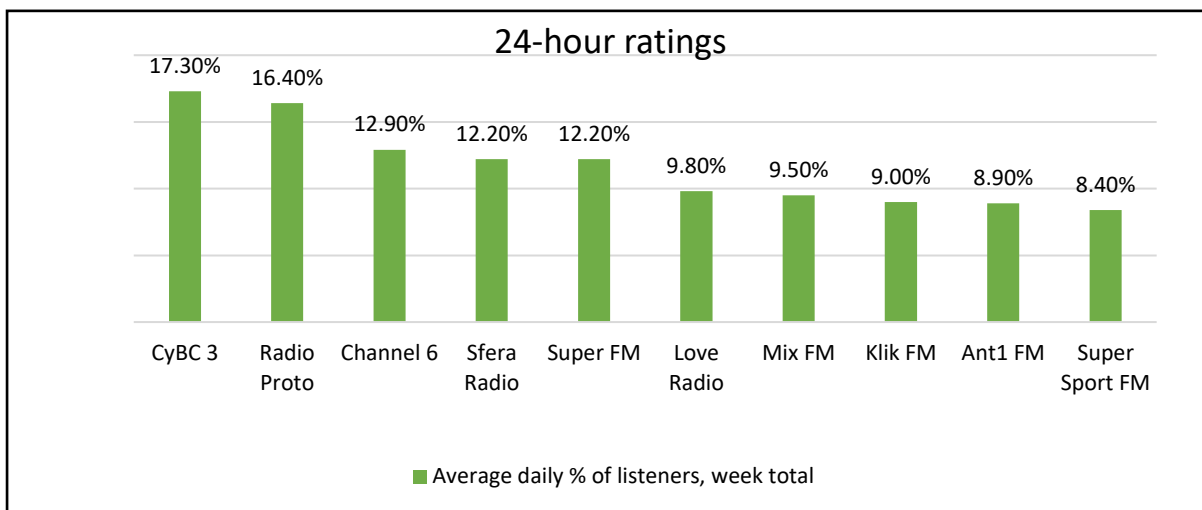
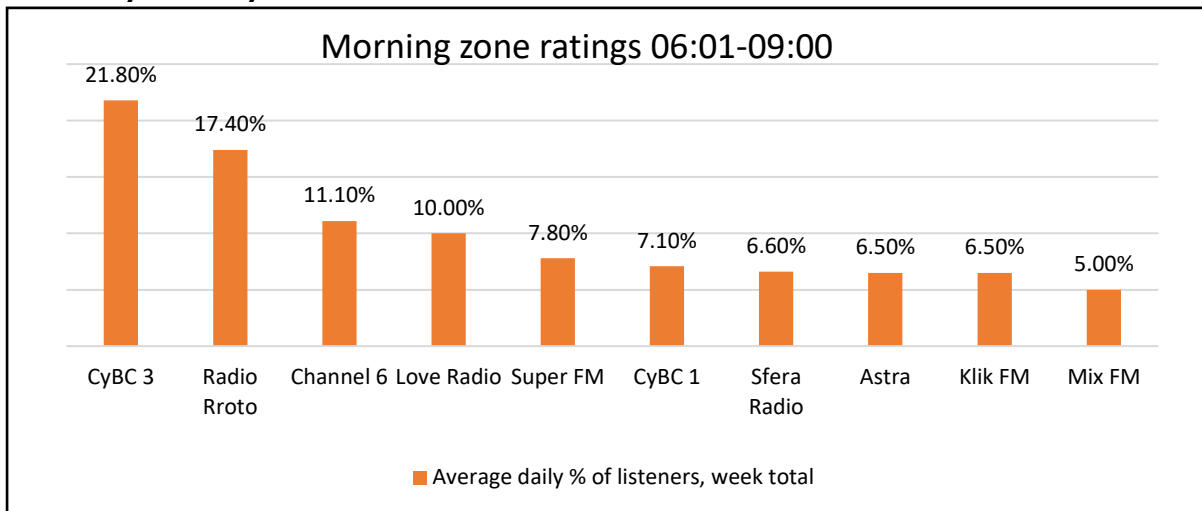
News websites on the other hand are moving in the opposite direction, showing an across the board rise in volume traffic, both compared to last year (+4 pp on weekdays, 1.8 pp on Saturday and 0.8 pp on Sunday) and the previous quarter (+3.5, 3.2 and 1.2 respectively). **Philenews.com** still leads the volume traffic race with **politis-news.com** coming in second.

| Jul. – Sep. 2017 | Weekdays 25.9% | | Saturday 18.6% | | Sunday 12.9% | |
|--------------------------|-------------------|----------|-------------------|---------|-----------------|---------|
| | % | read. | % | read. | % | read. |
| Philenews.com | 17.4 | 126, 232 | 12.2 | 88, 315 | 8.5 | 61, 269 |
| Politis-news.com | 8.9 | 64, 170 | 5.5 | 40, 082 | 5.2 | 37, 608 |
| Simerini.com.cy* | 4.5 | 32, 302 | 2.8 | 20, 142 | 2.6 | 18, 817 |
| kathmerini.com.cy | 3 | 21, 713 | 2.6 | 18, 994 | 1.5 | 10, 067 |
| Haravgi.com.cy | 1.2 | 8, 935 | 1 | 7, 360 | 0.5 | 3, 665 |
| Alithia.com.cy | 0.7 | 4, 845 | 0.2 | 1, 367 | 0.3 | 2, 136 |
| Cyprus-mail.com | 0.5 | 3, 384 | 0.8 | 5, 772 | 0.6 | 4, 240 |

*Simerini's and Haravgi's readership figures aren't reflected in their websites but on news portals sigmalive.com and dialogos.com respectively. No reliable figures for these two portals are available.

Radio

From May 1 – July 31 2017



Morning zone

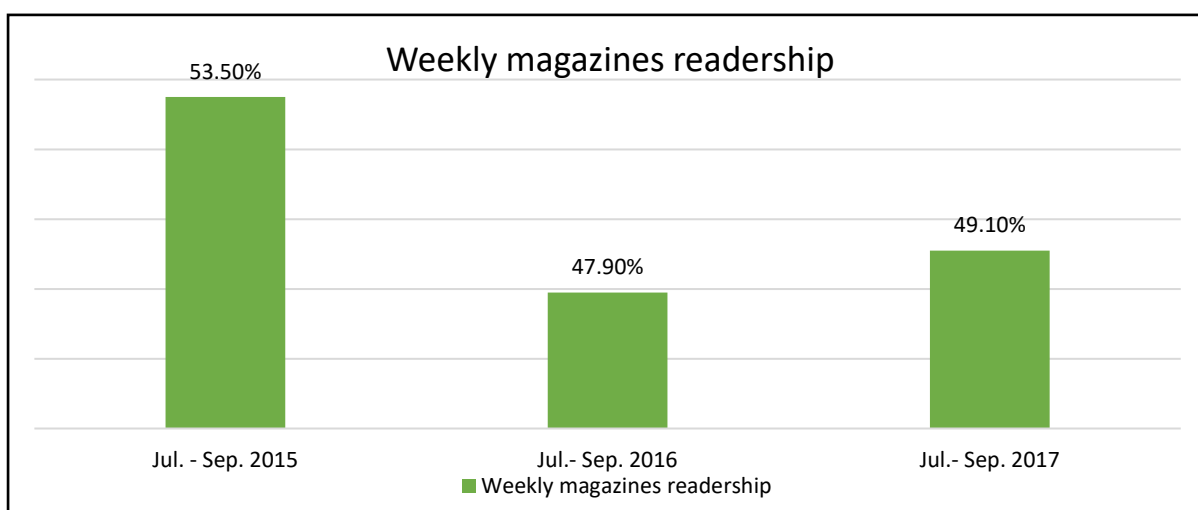
CyBC 3 continues to lead the radio stations in ratings in the morning zone, followed once more by **Radio Proto**.

24-hour

CyBC 3 and **Radio Proto** lead the ratings on a 24 hour basis, with **Channel 6** following in 3rd place.

Weekly Magazines

| Readership | Jul. – Sep. | | July | | August | | September | |
|---------------|-------------|----------|---------|---------|---------|---------|-----------|---------|
| | 2017 (%) | | 2017(%) | | 2017(%) | | 2017(%) | |
| | 49.1 | | 48.6 | | 53.8 | | 44.7 | |
| TV Mania | 20.2 | 146, 739 | 21 | 151,889 | 24.8 | 179,913 | 20.2 | 146,383 |
| Down Town | 17.2 | 124, 504 | 16.4 | 118,871 | 20.2 | 146,303 | 20.2 | 140,911 |
| HELLO | 17.1 | 123, 367 | 12.6 | 91,141 | 15.8 | 114,903 | 12.2 | 88,639 |
| OK | 12.2 | 88, 711 | 13.2 | 95,622 | 14.8 | 106,973 | 13.8 | 99,773 |
| Tile - Ores | 7.2 | 51, 858 | 12.8 | 92,608 | 6.9 | 49,799 | 8.7 | 62,772 |
| Beaut. People | 7.1 | 51, 152 | 6.8 | 49,541 | 7 | 50,834 | 6.6 | 47,558 |
| Cappuccino | 6.1 | 44, 303 | 8.9 | 64,291 | 7.4 | 53,821 | 4.5 | 32,863 |

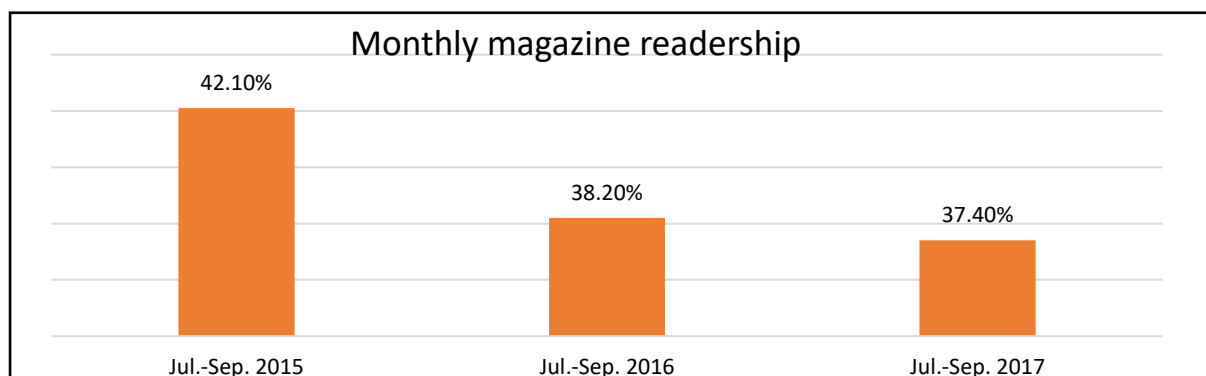


Weekly magazines

Readership for weekly magazines is on the rise compared to the previous quarter (+3.6 pp from 45.5%) and last year (+1.2 pp from 47.9%). **TV Mania** remains in the top spot (20.2%) although it dropped compared to the last quarter (-3.1pp from 23.3%). It should be noted that all other magazines reported an increase in readership.

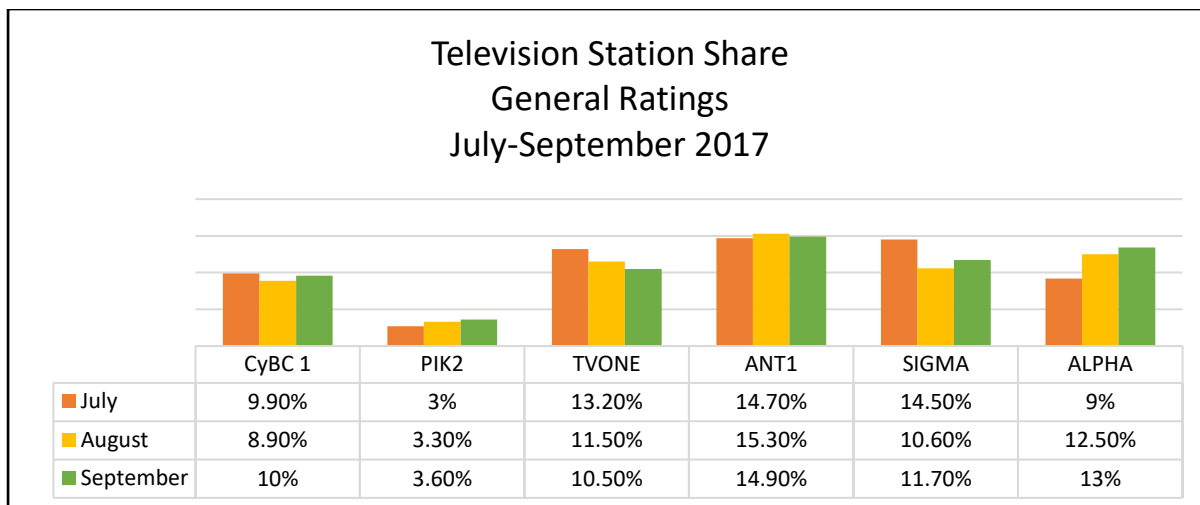
Monthly Magazines

| Readership (Top 10) | Jul.-Sep. 2017 | | July | | August | | September | |
|-------------------------|----------------|--------|------|--------|--------|--------|-----------|--------|
| | (%) | | (%) | | (%) | | (%) | |
| | 37.4 | | 36.5 | | 38.2 | | 37.3 | |
| Time-Out | 11.8 | 85,406 | 13 | 94,142 | 11.9 | 86,746 | 10.3 | 74,337 |
| Chries Sintages | 9 | 65,255 | 7.9 | 57,199 | 9 | 64,943 | 9.2 | 66,968 |
| Madame Figaro | 7.4 | 53,508 | 9 | 64,949 | 8.4 | 60,618 | 4.9 | 35,299 |
| Omikron | 5.8 | 41,697 | 6.8 | 49,060 | 4.7 | 34,273 | 7.3 | 52,967 |
| In Business | 4.4 | 31,753 | 4.4 | 31,892 | 4.8 | 34,784 | 5 | 36,357 |
| Glikes Alchimies | 3.8 | 27,356 | 4.6 | 33,161 | 3.9 | 28,234 | 3.3 | 23,894 |
| Must | 3.3 | 24,201 | 2.9 | 21,005 | 3.7 | 26,576 | 2.8 | 20,596 |
| Taste | 2.7 | 19,941 | 2.2 | 16,078 | 4.2 | 30,747 | 3.3 | 23,750 |
| LIFE | 2.9 | 21,279 | 2.4 | 17,473 | 4.8 | 34,889 | 2.2 | 16,075 |
| Gastronomos | 2.4 | 17,403 | 1.1 | 8,240 | 2.2 | 16,902 | 3.9 | 28,605 |

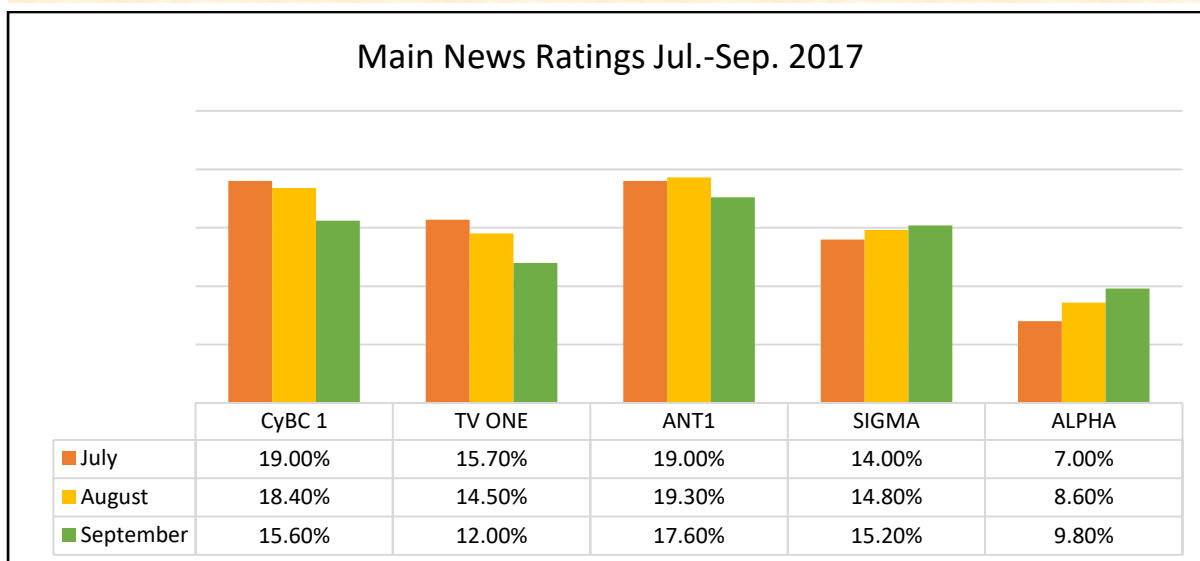


Monthly magazines readership reported a slight drop, despite a boost in August, a generally favorable period for monthly magazine sales because of the summer vacations. More specifically, readership dropped compared to the previous quarter (**0.9pp** from **38.3%**) and compared to the same period last year (**0.8pp** from **38.2%**). There was no change in the top 10 readership board, with **Time Out** taking the first stop (**11.8%**), followed by culinary magazine **Chries Sintages** and women's lifestyle magazine **Madame Figaro**.

Television



Alpha Cyprus is once more on the rise, gaining 4 percentage points in viewership within three months, bringing the station up to **13%**. **TV One** on the other hand is moving in the other direction, dropping from **13.2%** to **10.5%**. The remaining TV stations reported a slight drop in August, followed by an increase in September. **ANT1 TV** took the first spot in ratings with a **15.3%** high in August.



ANT1's improved performance boosted the station's main news, taking the first spot and going as high as **19.3%** in August. This is followed by **CyBC 1**, although the two stations shared the top spot in July with **19%**. **TV ONE** and **Alpha TV** follow the same trend formed by general ratings, with **TV One** even dropping **3.7 pp** from July to September, while **Alpha** is steadily on the rise, gaining **2.8 pp** in two months.