Association
of AV Media

RADIO Report 2022

VIA **RADIO Report 2022**

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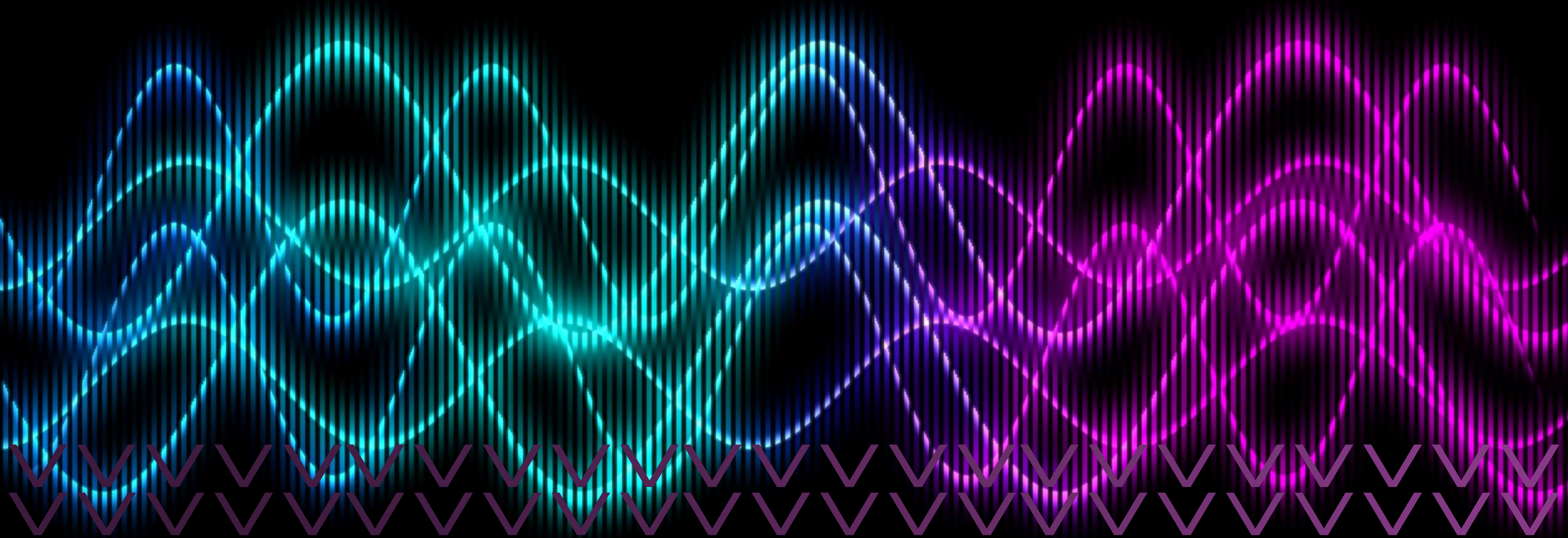


1. WHAT IS RADIO ?

What is Radio

In 2021 the CIM measured the “Share of Ear” for the first time. The second wave of this “Audio Time” study was conducted in Oct-Dec 2022 and gives an overview of all types of audio that are consumed and their relative importance in volume (and reach).

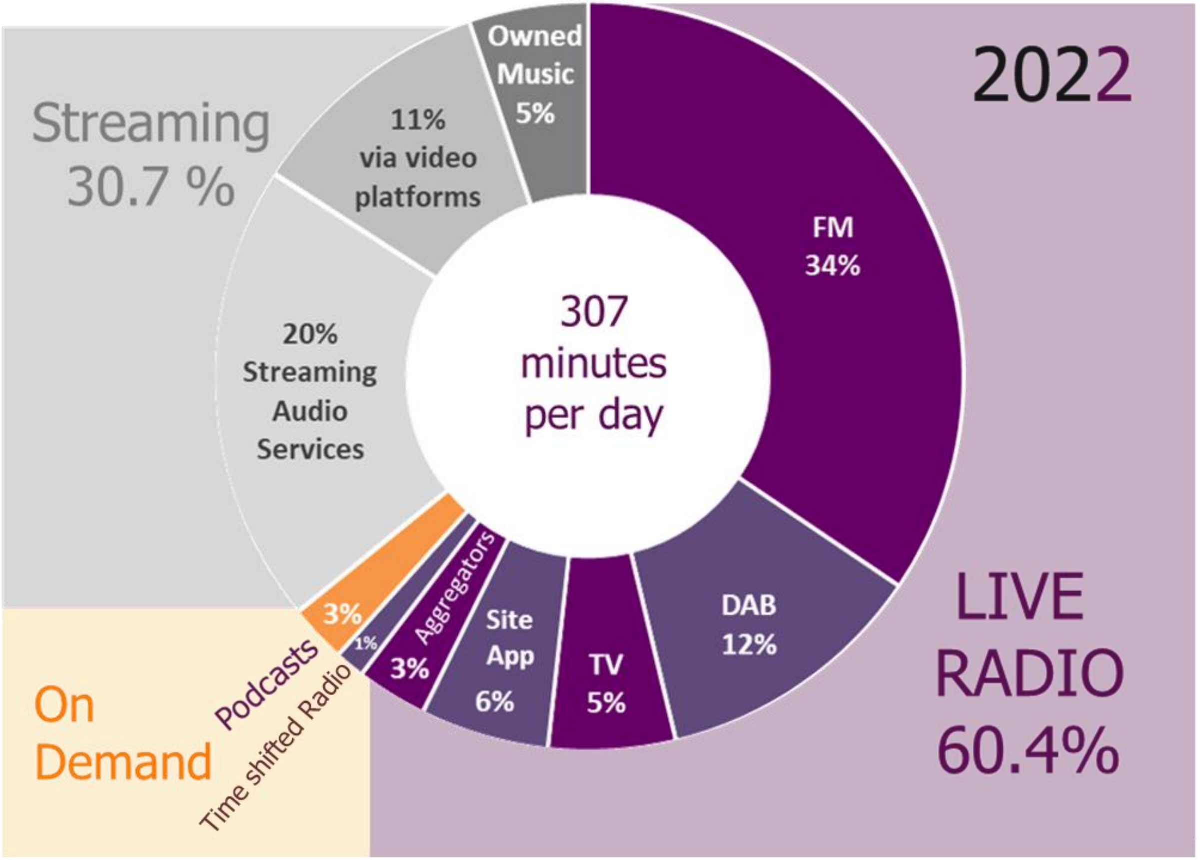
Radio is the biggest source of audio – with Live Radio in the lead and only limited “time shifted radio” – a new mode of consumption that is on the rise.

The sources of Radio listening are diverse but are increasingly digital, with DAB as the growth factor. When adding DAB, Site/App and Radio aggregators, 1/3 of total live radio volume is online.

With the rise of streaming services, a new way of audio consumption has emerged. Next to the audio platforms, the consumer is using video platforms (like YouTube) to listen to music (for free). When taking both together on the target 18-54, the volume is now about half of live radio volume. But this is highly dependent on the age band (see next page).

Last but not least : the new kid on the block are Podcasts. It is a way for many to bring content in an alternative way to their public. But it does not (yet) create lots of volume.

Live radio is nearly 2x the volume of streaming in 18-54y.

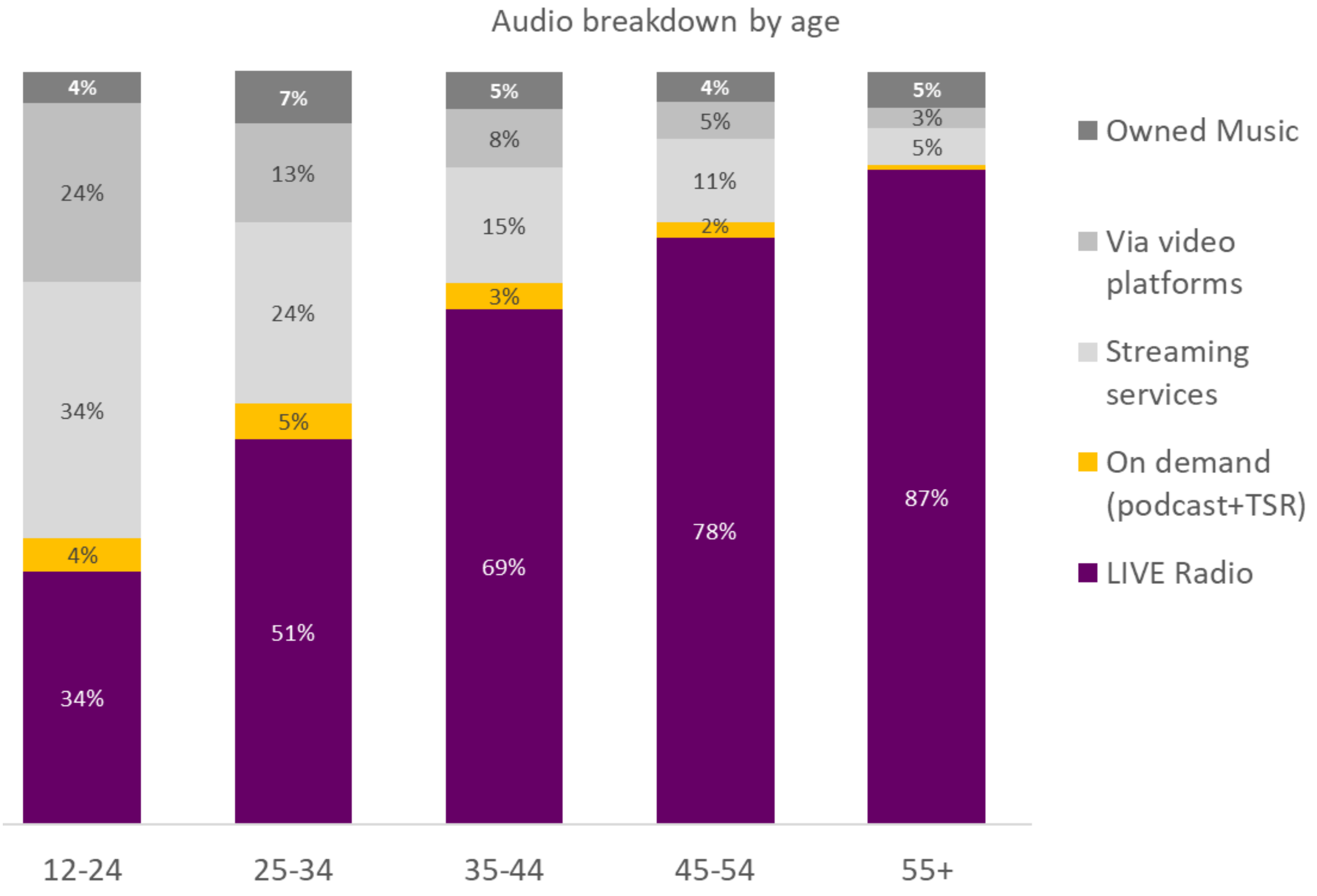


Source : CIM Audio Time 2023, 18-54y

Audio content types in function of age

The use of the different audio sources is very dependent on age. Teens have lower radio consumption and rely most on streaming services and "via video platforms". Starting the twenties, radio takes up and becomes more important than streaming. This is also the age with the highest "owned music" and "Audio On Demand" levels.

Starting 35+, streaming drops significantly and live radio becomes the dominant source of audio.



Source : CIM Audio Time 2023

2. RADIO INVESTMENTS

Key figures

In this comparison we included all sectors, including those where there is a lot of exchange, such as Media. The available tools don't give us the possibility to see the total picture as the effective number of GRP per delivered spot is only available for the main national radio stations. This table also only includes national spots and doesn't take regional spots into consideration.

It is clear that the number of advertisers & brands present on radio is still behind the pre-pandemic situation but the numbers are on the rise for the second year in a row.

The number of spots has increased both in the North and in the South and is even higher than pre-pandemic in the North.
The number of GRP (the number of times 1% of the target group 18-54 has been reached) has slightly decreased in the North and is stable in the South between 2021 and 2022.

The number of GRP per spot slightly decreases, more in the North than in the South.
Due to a more fragmented market, more spots are needed in the South.

Number of :	2018	2019	2020	2021	2022	*Index vs 2021*
Advertisers	1 577	1 515	1 144	1 242	1 330	*107*
Brands	2 244	2 178	1 495	1 648	1 864	*113*
Spotlength (spots only)	19,6"	19,5"	19,8"	19,9"	19,1"	*96*
North (spots only)						
Number of channels	10	9	9	9	9	*100*
Spots	465 604	497 146	436 662	487 007	511,889	*105*
Spots/channel/day	128	151	133	148	156	*105*
GRP 18-54	1331 630	1343 753	1117 554	1089 108	1,057,835	*97*
GRP per spot	2.9	2.7	2.6	2.2	2.1	*95*
South (spots only)						
Number of channels	10	10	10	10	10	*100*
Spots	747 877	728 444	590 319	671 205	680,032	*101*
Spots/channel/day	205	200	161	184	186	*101*
GRP 18-54	877 583	809 579	625 484	688 543	690,293	*100*
GRP per spot	1.2	1.1	1.1	1.0	1.0	*99*

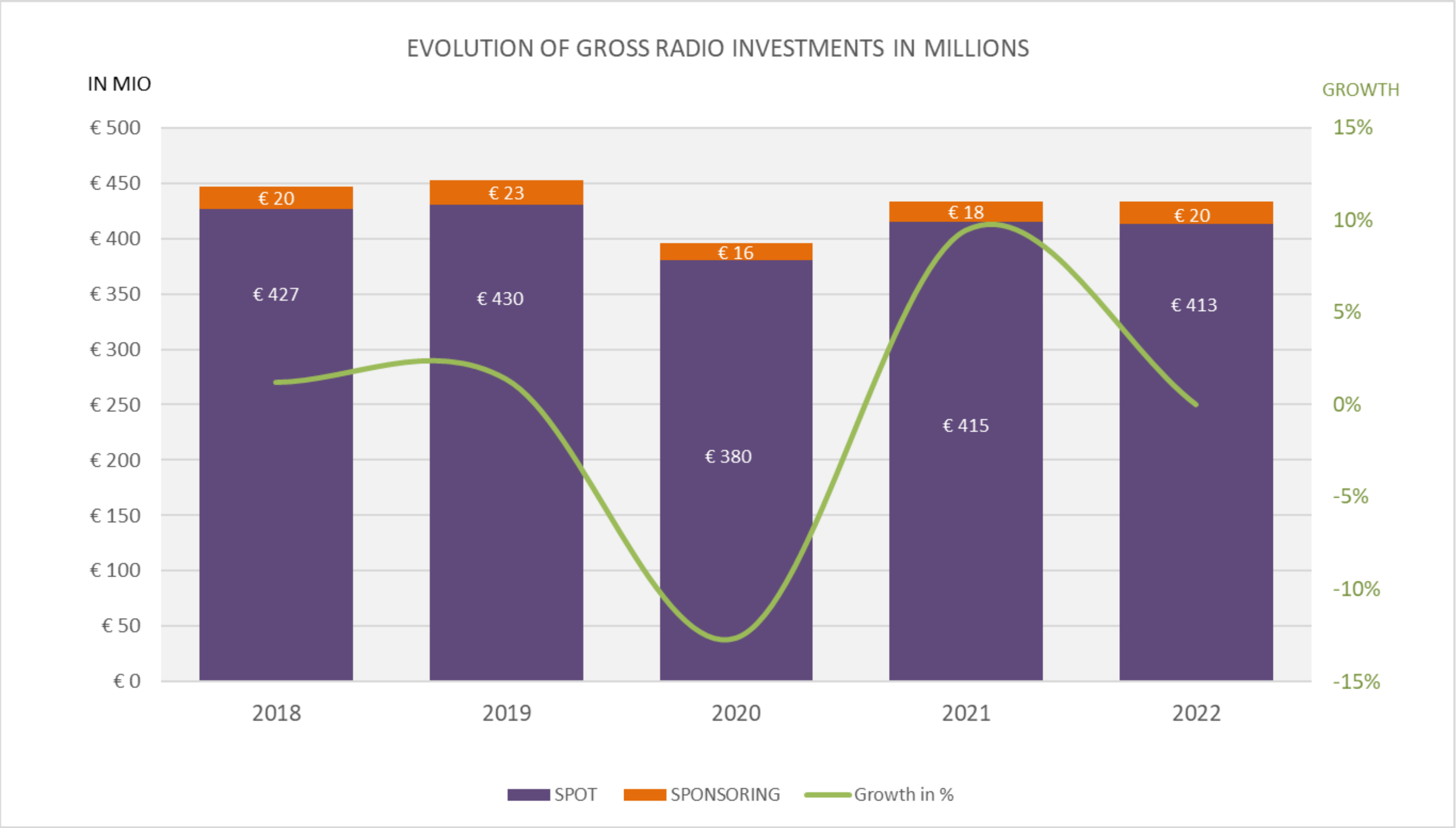
Source: Radio Competition – National. All sectors including (associated) manifestations/shows, Fairs, Media/Publishers

Radio gross investment

In Belgium, we only dispose of gross investments concerning media activities of advertisers. For radio this equals the rate card value of each spot or billboard that has been broadcasted. These investments do not reflect the actual amount that is paid, but it does allow to follow evolutions over time, to compare different advertisers or to analyze specific sectors.
Investment for online radio (only available in DAB+ or via streaming) are also not entirely included.

Some sectors like events, shows, fairs and the media itself often exchange media space among each other. To avoid bias these sectors were removed from this analysis as they tend to grow when the "normal" market is lagging (and vice versa).

Radio investments have been stable in 2022 compared to the previous year.
After a significant drop during the first peak of the pandemic, radio advertising investments have increased again but have not reached the same level as 2019 yet.

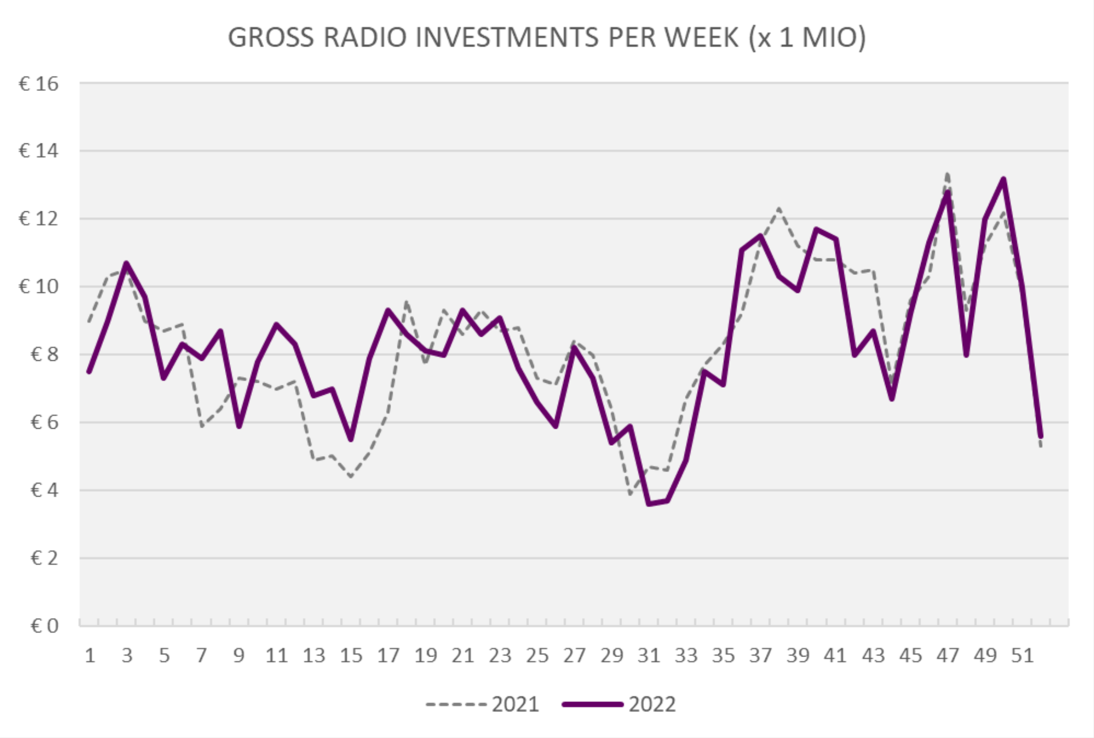


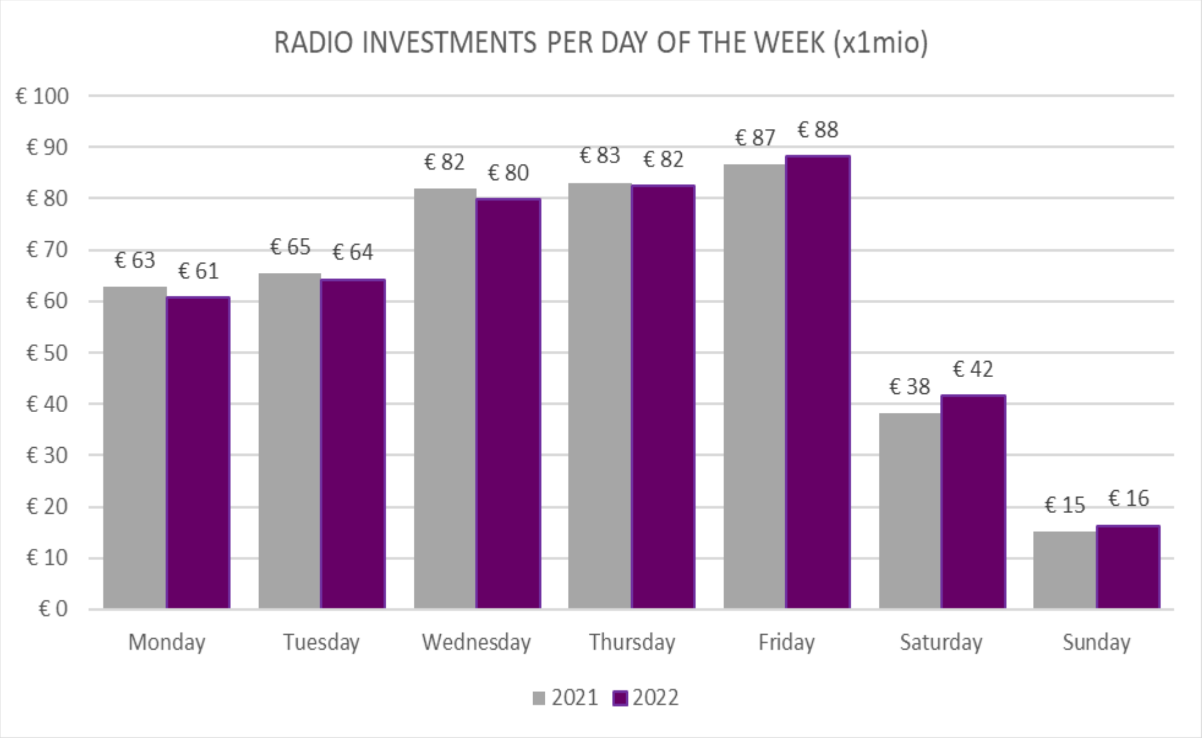
Source: Nielsen MDB – National. Excluded: (Associated) Manifestations/Shows, Fairs, Media/Publishers

Gross Radio investments – By Week and by day-of-the-week

In radio one can indicate 4 seasonal peaks: January, May-June, September and end of year – with downfalls in vacation periods.
As campaings tend to be short the variations between weeks can be quite high.
There is little variation in seasonality in 2022 compared to 2021. This also applies for the day-of-the-week levels.

Investments are traditionally higher in the middle of the week (Wednesday to Friday) as radio is used often tactical, with the distribution sector preferring to advertise closer to the peak weekend moment of sales. However, the levels in the weekend remain low.





Source: Nielsen MDB - National. Excluded: (Associated) Manifestations/Shows, Fairs, Media/Publishers

3. RADIO ADVERTISERS

Gross Radio investments by economic group

When looking at the evolutions sector by sector, distribution and tourism stand out, with investments increasing over the last two years obtaining a level that is even higher compared to the pre-covid period.

The increase in the distribution sector is mainly due to the food retailers whose investments have almost doubled since 2019 and who represent almost 40% of the sector's investments. Radio being percieved as a proximity and call-to-action media, it is not surprising to see the sector in first position.

On the downside, difficulties in car sales prevented the transport sector from returning to a pre-covid level.

Finally, investments in the energy sector decline due to the energy price inflation in 2022.

Economical group (in mio)	2019	2020	2021	2022	*index vs 2021*
DISTRIBUTION	€ 138.9	€ 133.6	€ 155.5	€ 172.2	*111*
SERVICES incl. FINANCE	€ 91.5	€ 81.4	€ 93.6	€ 83.7	*89*
TRANSPORT	€ 77.2	€ 51.6	€ 51.9	€ 46.0	*89*
CULTURE, TOURISM, FREE TIME, SPORTS	€ 33.9	€ 23.8	€ 33.7	€ 41.7	*124*
TELECOM	€ 30.6	€ 32.8	€ 31.8	€ 32.2	*101*
HOME IMPROVEMENT	€ 37.3	€ 27.8	€ 34.3	€ 31.5	*92*
FOOD	€ 18.0	€ 15.2	€ 10.2	€ 10.8	*106*
ENERGY - FUEL	€ 15.2	€ 19.3	€ 13.1	€ 7.0	*53*
HEALTH - WELLNESS	€ 7.7	€ 8.9	€ 5.6	€ 5.6	*100*
BEAUTY - HYGIENE	€ 2.0	€ 1.2	€ 2.6	€ 1.5	*58*
CLOTHES - ACCESSOIRES	€ 0.1	€ 0.1	€ 0.7	€ 1.0	*143*
OTHER	€ 0.5	€ 0.0	€ 0.2	€ 0.3	*150*
TOTAL	**€ 453**	**€ 396**	**€ 433**	**€ 434**	**100**

Source: Nielsen MDB – National. Excluded: (Associated) Manifestations/Shows, Fairs, Media/Publishers

Gross Radio investments – top 25 by advertisers

Since Covid, the supermarket chains have taken the lead in the advertisers ranking. With the exception of Delhaize, advertisers such as Aldi, Colruyt, Lidl and Carrefour have increased their investments in Radio by more than 50%. Aldi and Carrefour have even more than doubled their investments since 2019.

But also non-food distribution such as AS Watson (AS Adventure), Krefel, Brico, Belron (Carglass), Impermo and Krijnen (kitchens) showed higher investments - Mediamarkt being the exception.

Other notable risers are Toyota (index 188), Sunweb vacations (index 157) and SNCB/NMBS (index 292).

We see the disappearance from the top 25 of car advertisers such as D'Ieteren (top 1 in 2019), Ford, Citroën and Peugeot.

	Advertiser (in mio)	2019	2020	2021	2022	*index vs 2021*
1	ALDI	€ 4.4	€ 11.3	€ 15.4	€ 17.0	*110*
2	COLRUYT	€ 8.0	€ 10.0	€ 13.8	€ 14.1	*102*
3	LIDL & CO	€ 7.6	€ 8.8	€ 10.2	€ 13.8	*135*
4	LOTERIE NATIONALE	€ 10.3	€ 10.5	€ 14.6	€ 13.6	*93*
5	CARREFOUR	€ 4.3	€ 4.2	€ 6.0	€ 9.6	*160*
6	PROXIMUS	€ 8.6	€ 8.0	€ 7.9	€ 8.8	*111*
7	BNP PARIBAS FORTIS	€ 3.7	€ 6.8	€ 6.7	€ 8.2	*122*
8	ORANGE	€ 7.0	€ 7.1	€ 7.2	€ 8.0	*111*
9	AS WATSON	€ 4.8	€ 5.6	€ 7.3	€ 7.9	*108*
10	DELHAIZE	€ 7.9	€ 10.1	€ 8.6	€ 7.3	*85*
11	VOO	€ 6.7	€ 6.4	€ 7.8	€ 6.9	*88*
12	TELENET OPERATIES	€ 3.8	€ 4.3	€ 4.4	€ 5.1	*116*
13	VLAAMSE GEMEENSCHAP	€ 6.7	€ 7.0	€ 5.4	€ 4.9	*91*
14	KREFEL	€ 4.5	€ 4.6	€ 4.2	€ 4.9	*117*
15	TOYOTA BELGIUM	€ 0.5	€ 1.4	€ 2.5	€ 4.7	*188*
16	KRIJNEN	€ 4.0	€ 4.0	€ 4.4	€ 4.7	*107*
17	MEDIAMARKT	€ 5.7	€ 4.9	€ 5.0	€ 4.4	*88*
18	BOL.COM	€ 4.2	€ 3.7	€ 4.3	€ 3.9	*91*
19	DISTRIPAR	€ 2.8	€ 2.8	€ 3.9	€ 3.7	*95*
20	BRICO INTERNATIONAL	€ 3.1	€ 1.2	€ 3.2	€ 3.7	*116*
21	IMPERMO	€ 2.0	€ 2.0	€ 3.1	€ 3.6	*116*
22	SUNWEB VAKANTIES	€ 1.8	€ 1.0	€ 2.3	€ 3.6	*157*
23	BELRON	€ 2.9	€ 2.2	€ 3.4	€ 3.5	*103*
24	BMW BELGIUM	€ 5.5	€ 6.0	€ 4.2	€ 3.5	*83*
25	SNCB/NMBS	€ 0.9	€ 0.7	€ 1.2	€ 3.5	*292*

Source: Nielsen MDB – National. Excluded: (Associated) Manifestations/Shows, Fairs, Media/Publishers

4. LISTENING TO RADIO (on all devices)

RADIO MEASUREMENT

Radio is measured in Belgium with the use of diaries. People are asked to write down, quarter by quarter, what they have been listening to during a full week.
In order to be representative for all regions, the sample size needs to be big enough, the goal is 8000 interviews per wave.
While the fieldwork is nearly continuous, the publications happen in “waves”.
Normally 3 waves per year: January-April, May-August and September-December.
Due to covid and to problems it generated in the face-to-face fieldwork, the publications did not follow that rythm in the period 2020-2021.

In the tables produced on the following slides, we refer to the field periods 1, 2 and 3 per year, and for 2020 to 1 and 2. In the table you can find the corresponding months this covers.

When looking to devices and online & offline listening, it is important to notice that the methodology of declaration **covers ALL listening.** People do indicate where they listen and if it is online or not, as extra information.

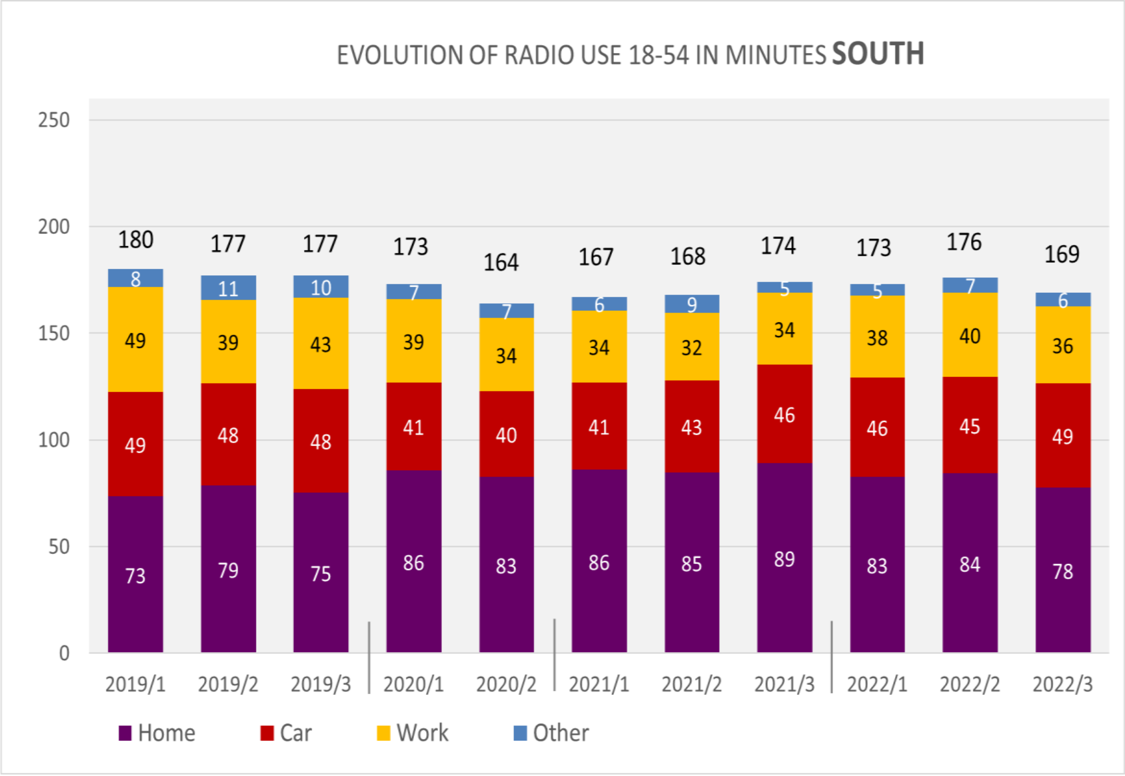
As more and more streaming radio stations emerge, and on demand radio is starting to take up, a separate initiative was launched to cover all this listening based on the first party data of the radio stations. Today, only the live part is covered.
This study does not detect “new” listening. It just details listening that is already in the radio study.

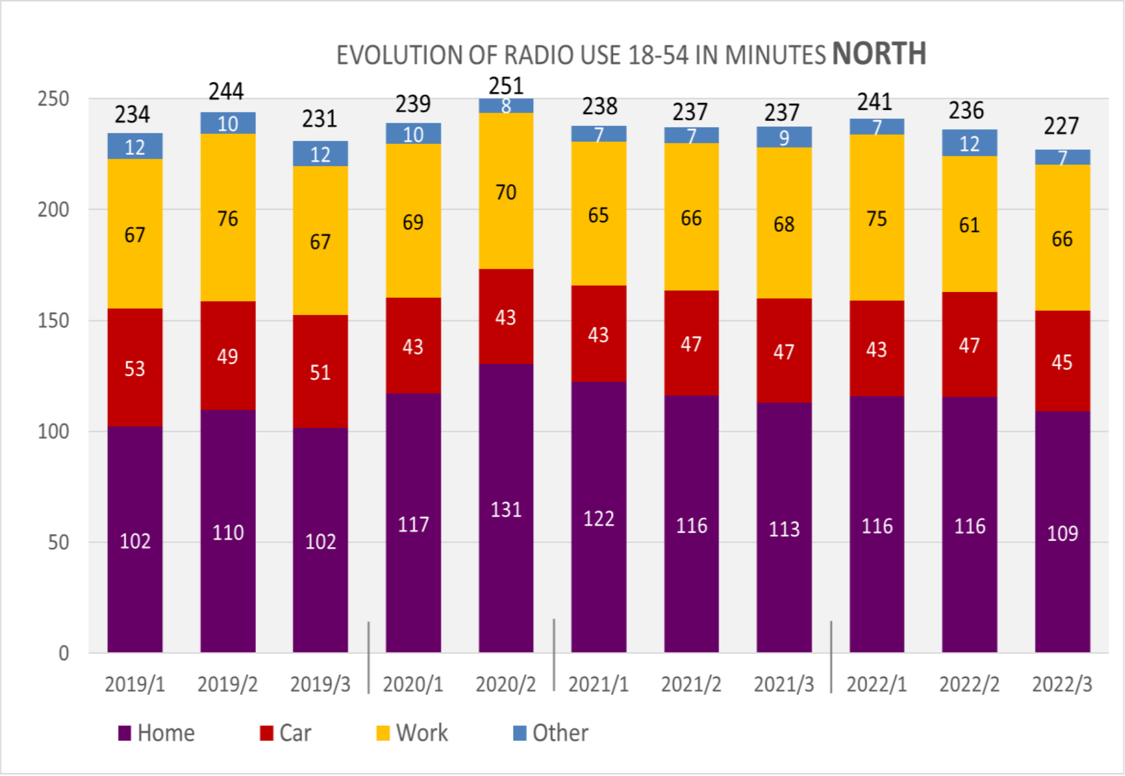
Published wave	Months
2019/1	Jan-Apr
2019/2	May-Aug
2019/3	Sep-Dec
2020/1	Jan-Jun
2020/2	Sep-Feb
2021/1	Mar-Jun
2021/2	May-Aug
2021/3	Sep-Dec
2022/1	Jan-Apr
2022/2	May-Aug
2022/3	Sep-Dec

EVOLUTION OF RADIO LISTENING (WITH SPLIT BY LOCATION)

The consumption of radio has always been lower in the South versus the North (in reverse with TV).
The evolutions in time are not spectacular. When taking the 3 waves of 2022 together and compared to 2021. The South is slightly increasing.
In the North, with much higher consumption, the average 2022 is a little lower due to the last wave.

Radio is most listened in the home, with about 48% of total consumption. Listening in the car is limited to about 27% in the South and 20% in the North. When looking at the situation on the workplace, it is more or less the opposite, with nearly 30% of volume in the North.



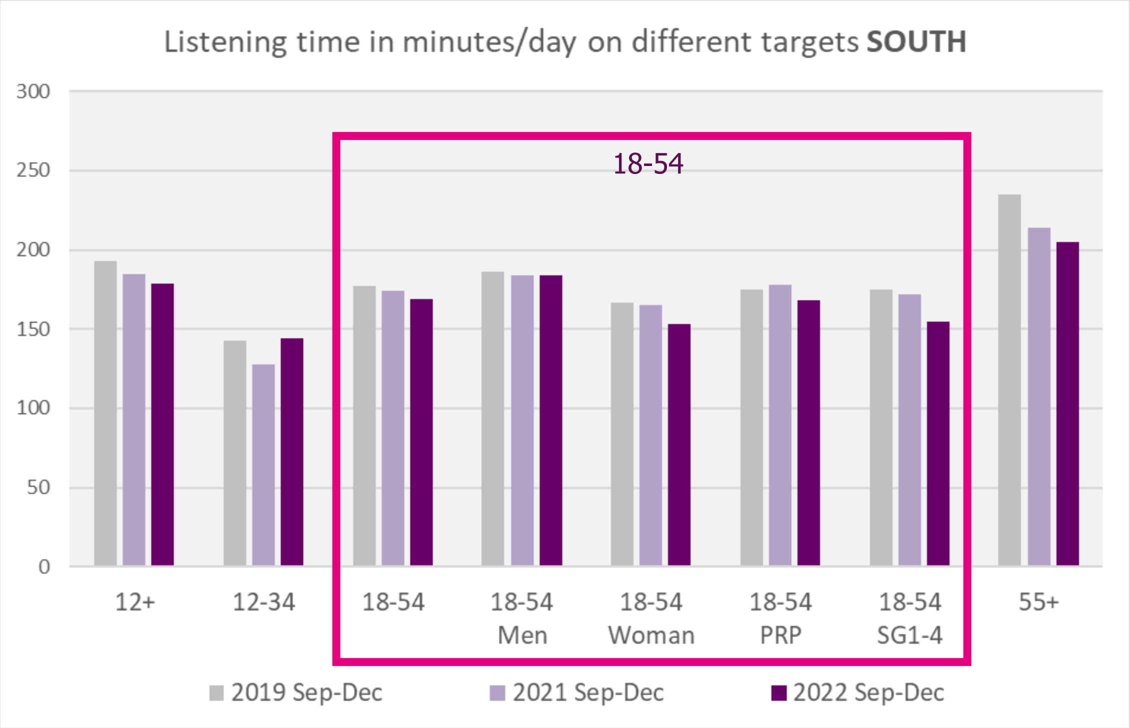


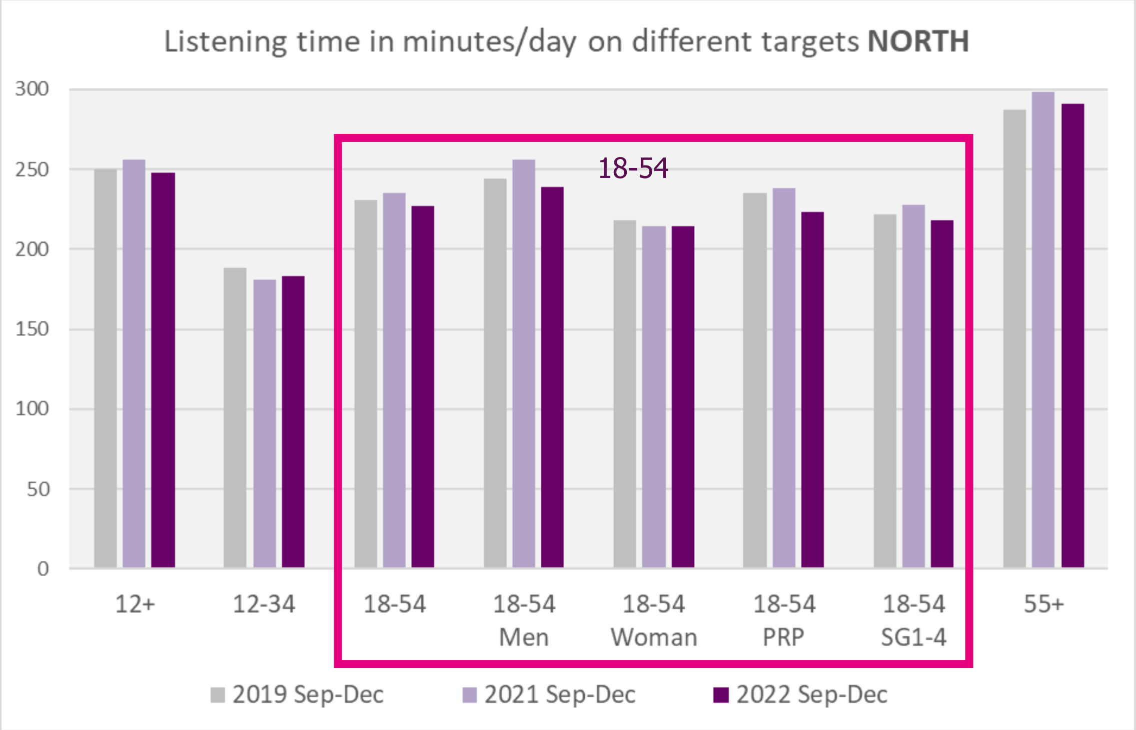
CIM RAM, Mon-Sun, 05-00h, Total radio, 18-54

TIME RADIO LISTENING PER TARGET

We have compared the last 2 years with the pre-covid year 2019 and have done this on the last wave of each year.
The last wave of 2022 was in decline in both North and South, but when compared to 2019, only the South shows a decreasing trend.

In general the differences in average listening ~~volume~~ time among the different target groups are rather small.
Men have higher listening volumes than women and upper social groups hold strong.





CIM RAM, Mon-Sun, 05-00h, Total Radio, Average Time Listening (in minutes)

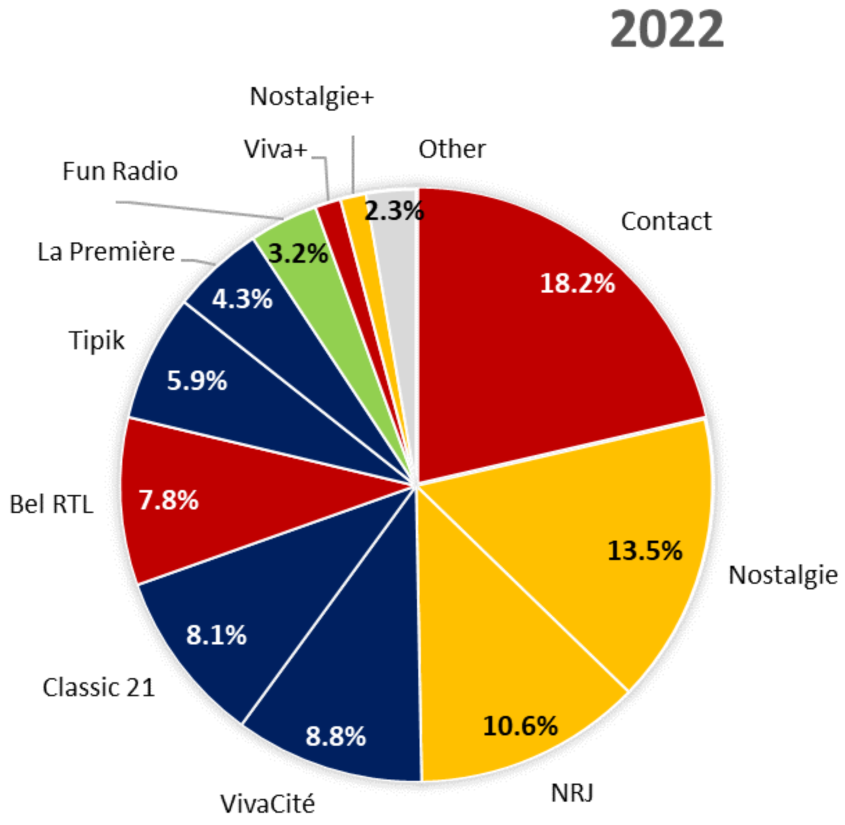
MARKETSHARES 18-54 SOUTH

In radio, every station has a specific profile. When producing marketshares we need to choose a target and that is 18-54 in this report. This has as consequence that some stations with high listening volumes in older age groups may come out less performant.
Indicated evolutions are between the last wave of 2021 and the last wave of 2022.

Contact is market leader on 18-54 and has strenghtened its position in 2022.
Also NRJ (Group N) has showed good progress.

All channels that have less than 1% marketshare (in 2022) are grouped in “other”. This volume is rather limited (compared to the North).

Overall RTBF (dark blue) remains market leader but RTL (red) or NGroup (orange) are closing the gap, resulting in 3 groups that have similar volume.



Sept - Dec	Evolution 2022 vs 2021
Contact	+ 2.4
Nostalgie	- 0.1
NRJ	+ 2.8
VivaCité	+ 0.9
Classic 21	- 2.3
Bel RTL	- 2.0
Tipik	- 1.2
La Première	+ 0.0
Fun Radio	+ 0.5
Viva+	+ 0.9
Nostalgie + (FR)	+ 0.5
Other	- 1.7

CIM RAM, Mon-Sun, 05-00h, South, 18-54,

MARKETSHARES 18-54 NORTH

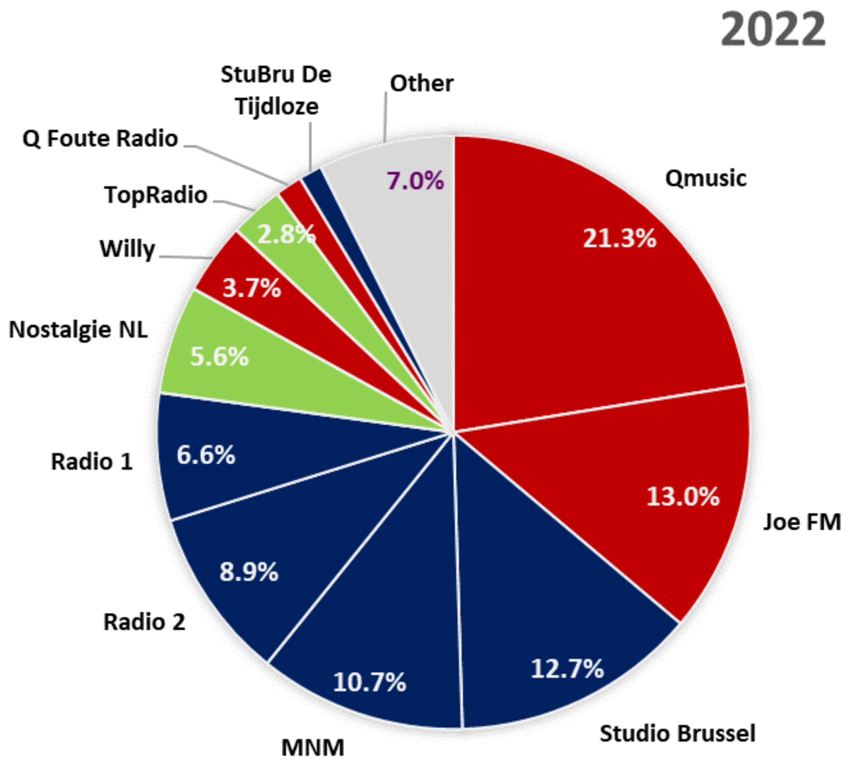
In radio, every station has a specific profile. When producing marketshares we need to choose a target and that is 18-54 in this report. This has as consequence that some stations with high listening volumes in older age groups may come out less performant.
Indicated evolutions are between the last wave of 2021 and the last wave of 2022.

Qmusic is market leader on 18-54 and has strengthened its position in 2022.
Especially Joe FM has showed good progress.

The long tail with “other radio” (all stations below 1% marketshare) is more important in the North.

Note that Nostalgie NL is not part of NGroup who holds Nostalgie FR in the South.

Overall VRT (dark blue) remains market leader but DPG Media (red) is closing the gap.



Sept - Dec	Evolution 2022 vs 2021
Qmusic	+ 0.6
Joe FM	+ 2.0
Studio Brussel	- 3.0
MNM	- 1.7
Radio 2	- 1.6
Radio 1	- 0.3
Nostalgie NL	- 0.1
Willy	+ 2.4
TopRadio	- 0.5
Q Foute Radio	+ 0.7
StuBru De Tijdloze	+ 0.6
Other	+ 0.0

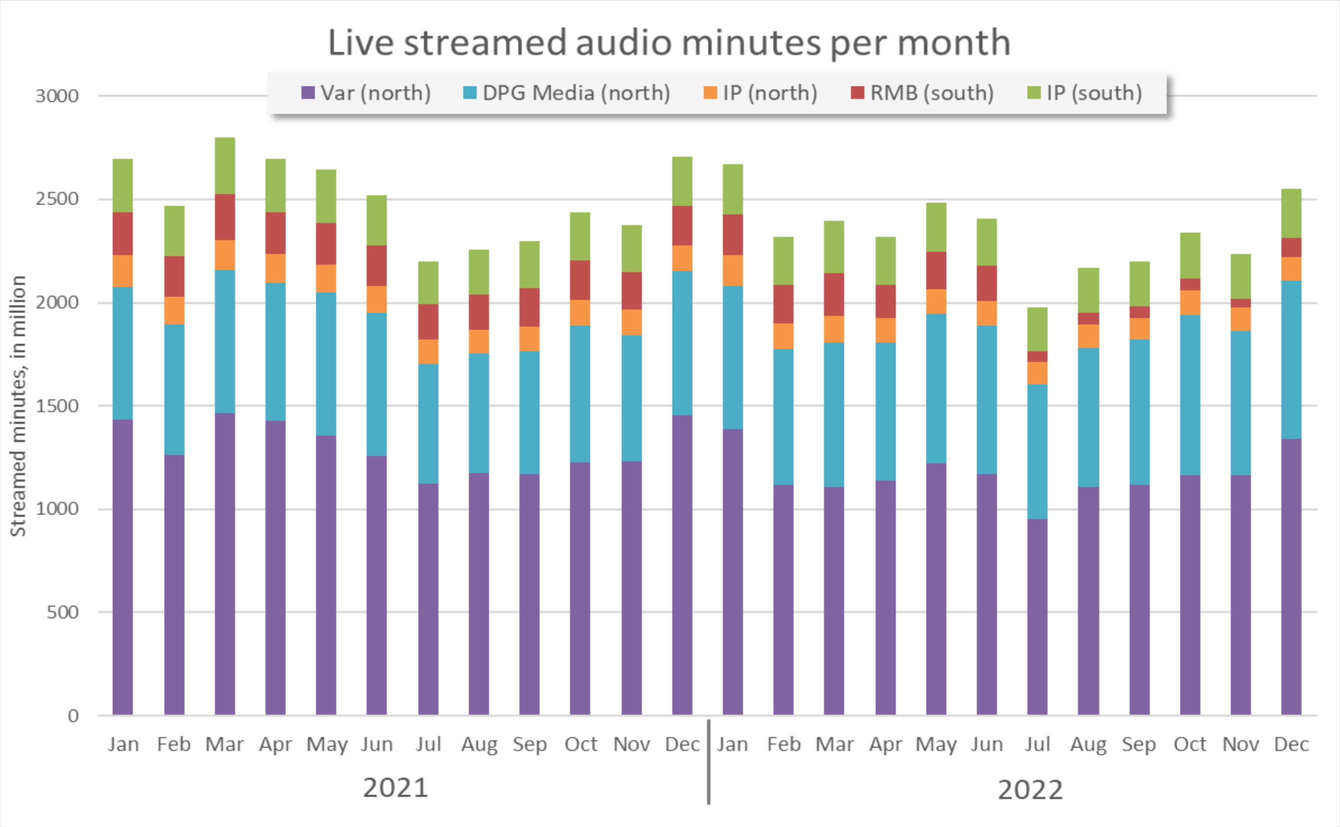
CIM RAM, Mon-Sun, 05-00h, North, 18-54,

STREAMING RADIO

Radio streaming is gaining importance every day. These are new channels or theme channels that you can only listen to via the internet, live and on demand. This contains also podcasts with specific content, for example from radio stations or news sites, that you can download to listen to (even offline) whenever you feel like it.

CIM measures this via a server-side approach that uses directly the logfiles generated by the streaming servers (1st party data).
In the logfiles, all events (stream requests by/and sent to a "web service" through IP) are stored by the streaming server.

The advantage of a server-side measurement is that it covers 100% of the delivered streams, independently of the receiving platform.
The disadvantage is that the method cannot identify the exact consumption of the delivered stream. In the case of Audio On Demand for example, we do not know if the downloaded audio file has been consumed. Even for a live stream, most of the players are "buffering" before the "real" consumption (play) by a user, causing a bias.



Sales House	Broadcaster	Radio Station	#sub-radios
IP (South)	Radio H	Radio Contact	9
		BEL RTL	1
		Mint	1
	N Group	Nostalgie FR	13
	Fun Radio	Fun Radio .be	25
RMB (South)	RTBF	Classic 21	10
		Jam	1
		La Première	2
		Misic 3	2
		Ouftivi	1
		Pure	4
		Tarmac	2
		RTBF Spot	1
		Vivacité	8
	Ngroup	NRJ	19
	IPM	DH Radio	1
IP (North)	Nostalgie	Nostalgie NL	11
		NRJ Vlaanderen	1
		Zen FM	1
DPG (North)	DPG Media	Joe	8
		Qmusic	11
		Willy	1
	Topradio	Topradio	1
VAR (North)	VRT	Ketnet Radio	1
		Klara	2
		MNM	5
		Radio1	2
		Radio2	5
		Studio Brussel	5

CIM Radio Stream Monitor, Belgian IP-Adresses. RMB-data are not complete from July-22

5. LISTENING TO OTHER CONTENT

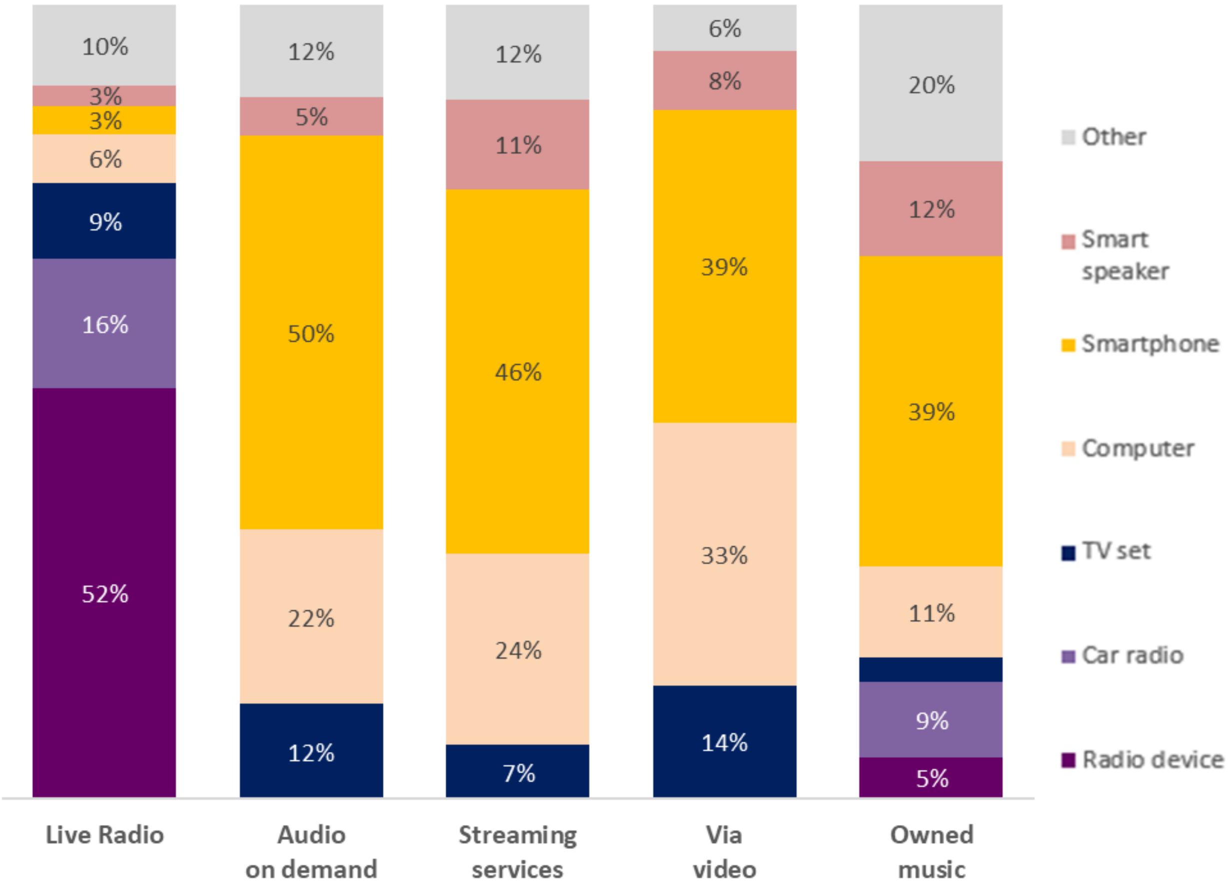
WHAT TYPE OF DEVICE IS USED TO LISTEN TO CONTENT (other than radio)

CIM Audio Time gives an overview of all the audio types & devices that are consumed.
The first important learning is that Smartphones are the dominant way to listen to “other content”. For Audio on demand (podcast and timeshifted radio) and Streaming services, this is about 50% of the volume. But even for music via video, or owned music, it is the most important source.

Other learning : the smart speaker has an important role in the consumption to non-radio content. It is however not clear if this is as (bluetooth) speaker only, or if people use it to get access.

The computer is also an important access device. Very logical that it is used for music via video streaming. But it also plays a role on the other content types.

Device used for type of content, 18-54



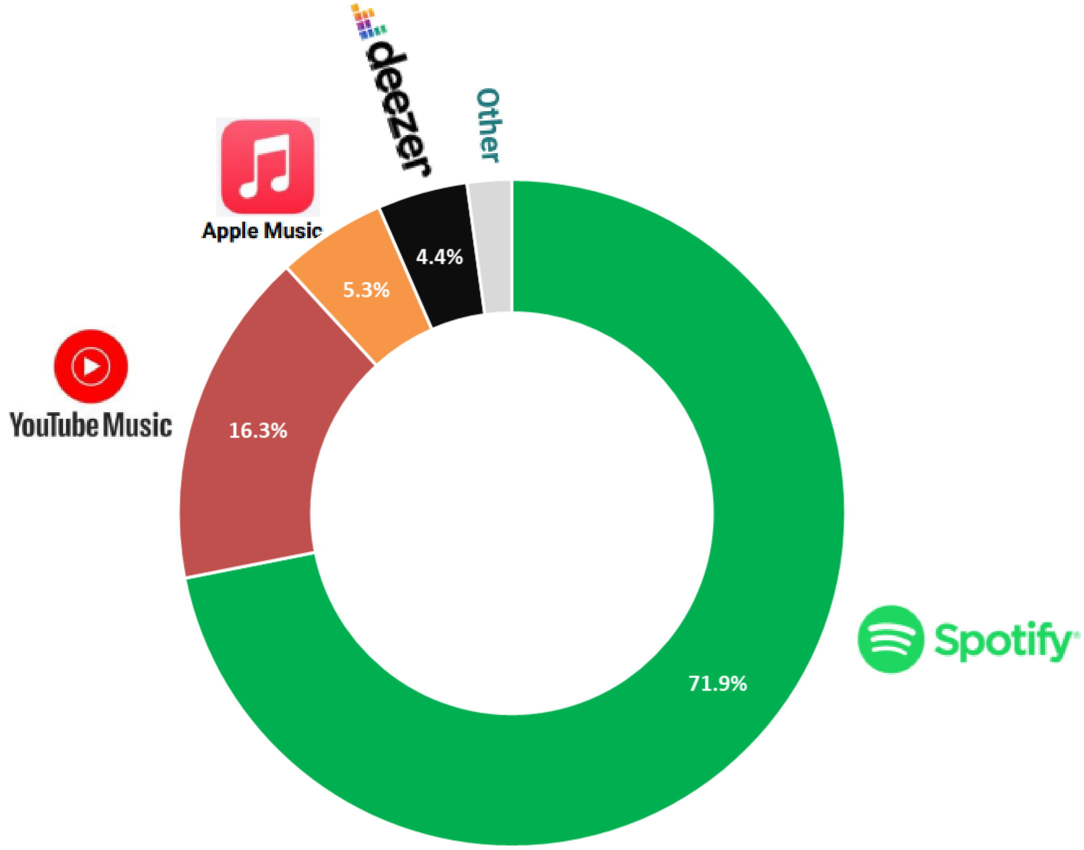
Source : CIM Audio Time 2023, on target 18-54

STREAMING SERVICES

CIM Audio Time has also asked about the brands of music streaming service that people use (and/or pay for).

No surprise to see that Spotify has more than 2/3 of volume. This platform is more important in the North versus the South.

YouTube music, Apple music and Deezer take a quarter of the volume, and are more present in the South.



Source : CIM Audio Time 2023, 18-54

VIA RADIO Report 2022

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VIA

Association
of AV Media

ABOUT VIA

VIA unites the salesorganisations of the Belgische Audio-Visual media (TV, Radio, Cinema) and has the following goals:

- Stimulate consultation between the members
- Connect in order to develop new initiatives in the market
- Facilitate consultation about technology
- Promote the power of our media, by setting up joint research that supports our current offer & future developments.
- Support the setup of measurement and reporting of media, help to achieve consensus and bring together our experts.
- Represent its members towards other associations