Association of AV Media

TV Report 2022

VIA **TV Report 2022**

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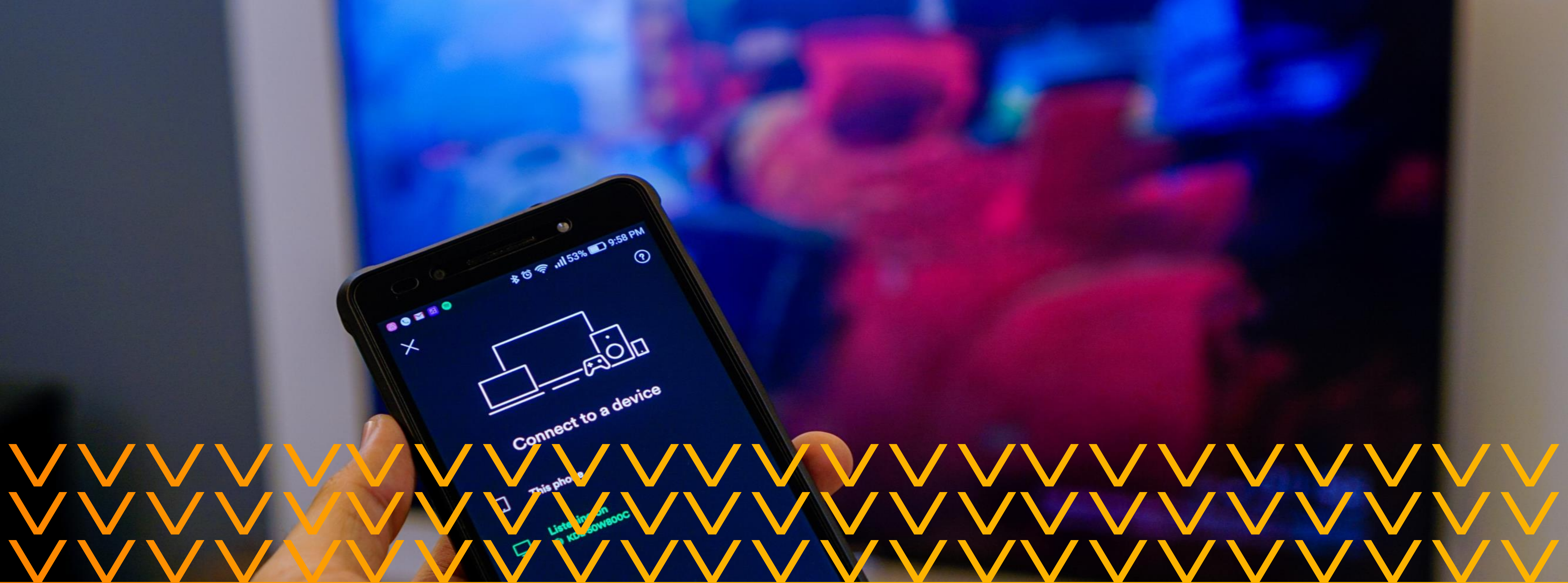


1. WHAT IS TV ?

WHAT IS TV ?

Not so long ago "watching the TV screen" was the equivalent of "watching TV channels". Today this is no longer the case. The TV-screen has actually become a digital screen like any other, with connectivity similar to a computer (HDMI, WiFi, LAN, USB). Today, almost half of all TV sets are a "smart TV" and 19% has a chromecast (source: CIM ES 2022)

TV channels can now be watched on other devices. The broadcasters have developed BVOD (Broadcaster Video On Demand) platforms to facilitate this. The apps versions become available on the smart TV and will eventually make it very easy to view "broadcaster content" on the big screen in a non-linear way.

On the other hand, the use of the TV screen to watch "non broadcaster content" is growing, thanks to its connectivity. In the past Video/DVD was an important source and the viewing could be isolated. The new platforms like Netflix, Streamz, Disney+ or video platforms such as Youtube have a various list of connections and are hard to identify.

This remains a major challenge for measurement. Today CIM still uses "finger-printing" to recognize content on the TV-screen – this means comparing viewed content with a library of channels to find the right one. With the growth of non-linear viewing and the rise of international platforms, a lot of detected viewing is no longer attributed. It is called "Other Screen Use" or OSU.

The broadcaster's activity on the TV-screen is defined in CIM as live viewing and time shifted viewing up to 7 days after broadcast.
The BVOD supply on other screens is measured within the CIM internet study.
Content that is recognized on both sides is brought together and reported as 1 viewing figure.

2. TV INVESTMENTS

Key facts

As 2021 was the year of recovery, we compare 2022 in the first place with the previous year. But it remains interesting to look at the longer trend and the pre-covid year 2019.
In this comparison we include all sectors, also those that have a lot of mutual exchange, such as media.

The number of advertisers and brands present on TV in 2022 has grown again. While the number of advertisers is close to the pre-pandemic level, the number of brands is still lagging behind.
The trend of using more different commercials and billboards is validated. About 89% of the commercials is a new one (or a new version).
The average spot length (of the regular spots excluding billboards) continues to decrease and is now close to 20".

In the North, 2 extra channels were added in 2022. This caused the rise of the number of aired spots, but the number per channel per day remained stable.
A different picture in the South: no new channels but still more aired spots, so the number per channel per day is on the rise. The absolute level however remains significantly lower compared to the North.

When looking at the audience, the number of GRP (the number of times 1% of the target group 18-54 has been reached) is in decline in both regions. This endorses the fact that the audience of an average spot is in decline. Still the level in the South is more than double of the North.

Number of :	2018	2019	2020	2021	2022	*Index vs*	*Index vs 2019*
Advertisers	1,217	1,178	1,036	1,120	1,168	*104*	*99*
Brands	2,140	2,035	1,570	1,685	1,766	*105*	*87*
Commercials	11,907	12,059	11,697	13,479	14,252	*106*	*118*
New Commercials	10,650	10,698	10,403	12,019	12,632	*105*	*118*
Commercials/Brand	5.6	5.9	7.5	8.0	8.1	*101*	*136*
Spotlength (spots only)	21.0"	21.0"	21.6"	20.3"	20.1"	*99*	*96*
North (spots only)							
Number of channels	34	34	36	38	40	*105*	*118*
Spots	2,498,399	2,886,554	2,569,036	3,925,919	4,159,544	*106*	*144*
Spots/channel/day	201	233	195	283	285	*101*	*122*
GRP 18-54	870,176	883,195	819,584	889,080	831,040	*93*	*94*
GRP per spot	0.35	0.31	0.32	0.23	0.20	*88*	*65*
South (spots only)							
Number of channels	20	21	24	24	24	*100*	*114*
Spots	1,024,055	1,100,784	1,105,509	1,360,366	1,437,267	*106*	*131*
Spots/channel/day	140	144	126	155	164	*106*	*114*
GRP 18-54	777,650	755,747	690,606	778,452	696,190	*89*	*92*
GRP per spot	0.76	0.69	0.62	0.57	0.48	*85*	*71*

Source : CIM TV. All sectors including (Associated) Manifestations/Shows, Fairs, Media/Publishers

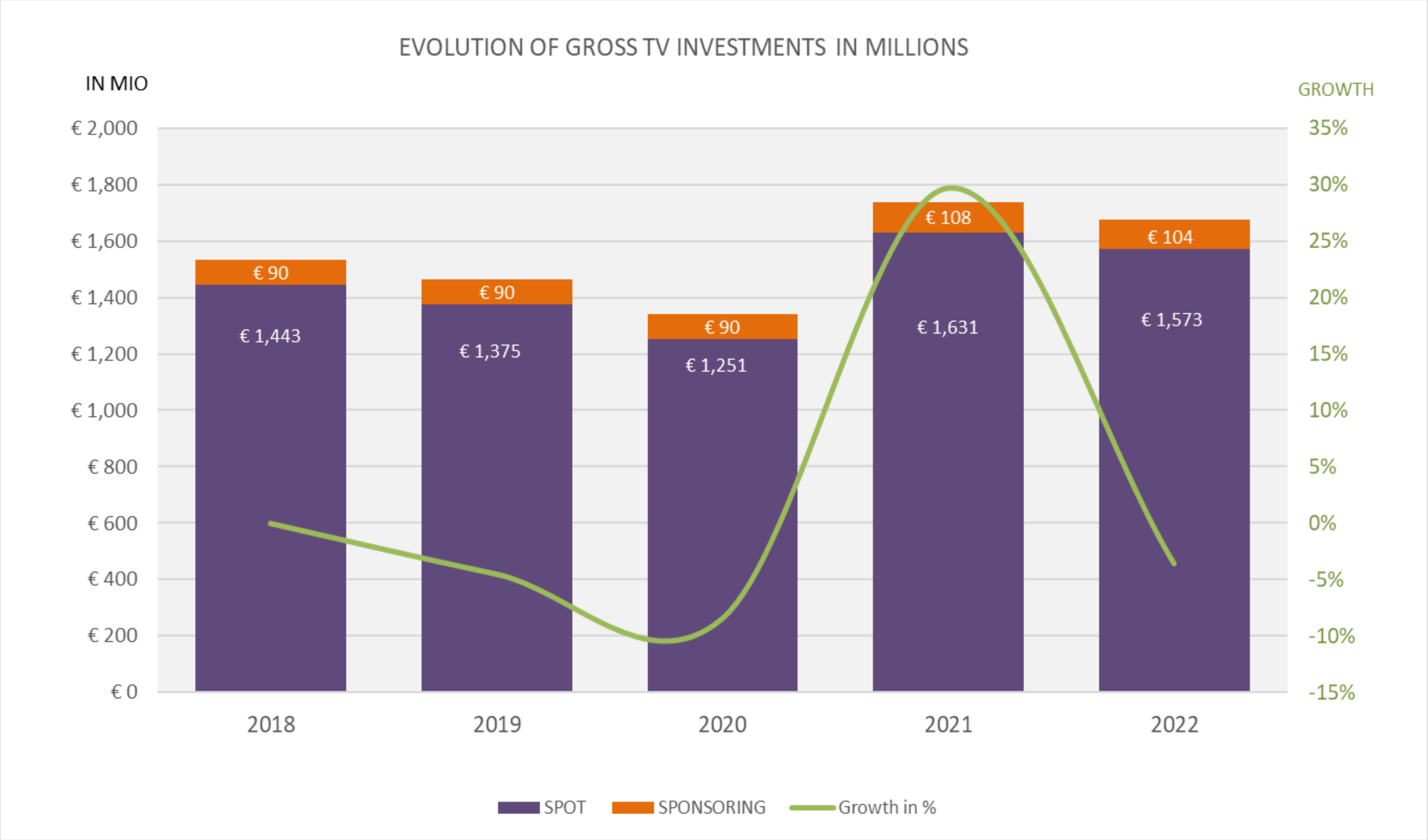
TV ADVERTISING. GROSS INVESTMENTS

In Belgium, we only dispose of gross investments concerning media activities of advertisers. For TV, this equals the rate card value of each spot or billboard that has been broadcast. 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.

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 visa versa).

Overall, 2022 was a turbulent year, with a war, an energy crisis and inflation that went through the roof. This had consequences on the TV spend, that decreased with -4% compared to the "post covid recovery year" 2021 which was then considered an ''all time high".
When compared to pre-covid investments there is still an impressive growth that is +15% versus the average of 2018-2019.

When looking at the type of investment, both spot and sponsoring decreased equally.



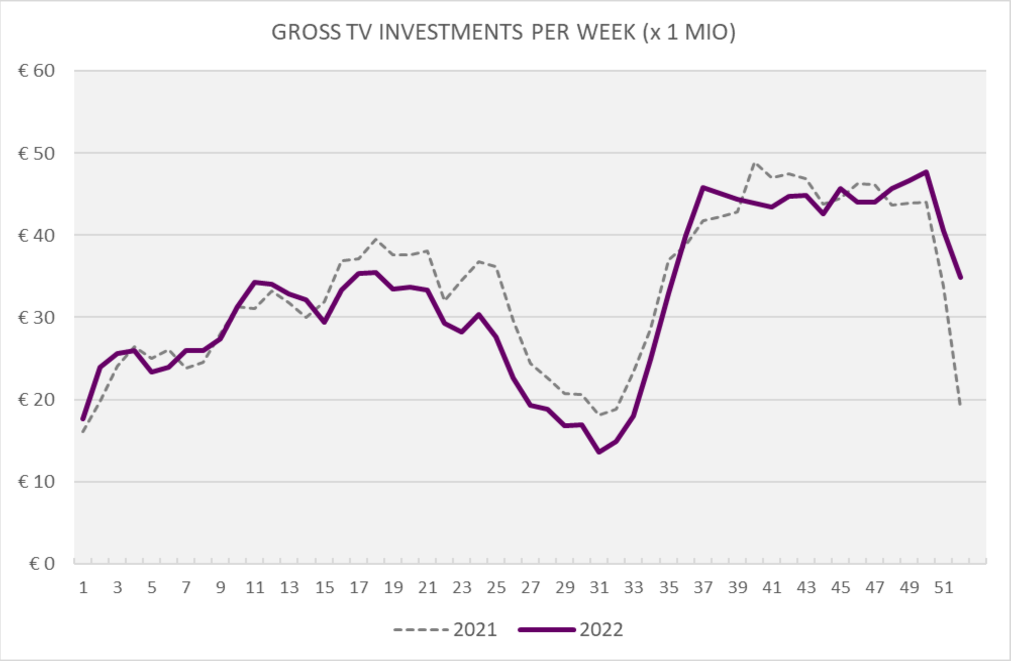
Source : MDB Nielsen. Excluded : (Associated) Manifestations/Shows, Fairs, Media/Publishers

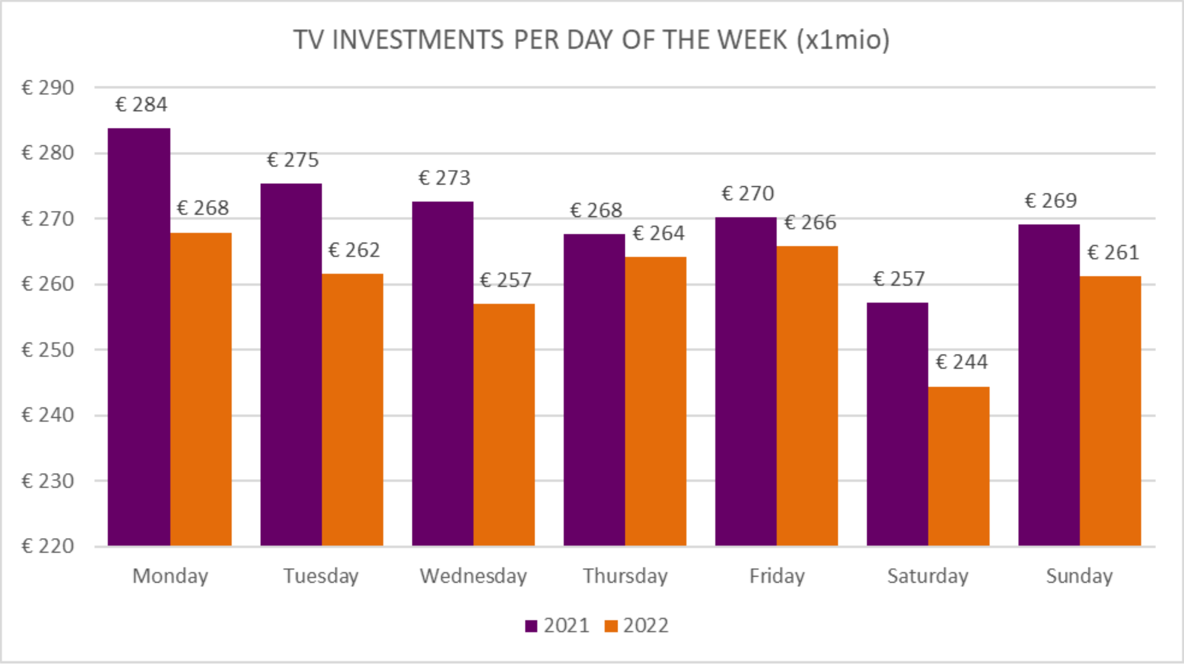
GROSS TV INVESTMENTS PER WEEK | PER DAY OF THE WEEK

In general, the investments per week follow the classic curve of seasonality of TV investments with a drop during summer and a peak in the fall.

From spring until the end of summer investments lagged compared to 2021, explaining the overall decrease.
In autumn the levels were comparable, with a small peak at the start in September and a better year-end versus the year before.

When looking at TV investments by day of the week it seems that the importance of specific days is leveling out.
This could be due to high demand and lower GRP offerings, resulting in a spread of investment (except Saturday). But another element is the increased time shifted viewing, resulting in the broadcasting day becoming less important.
On the other hand, it are Thursday and Friday that are most resistant and show the smallest decline. These are typically the most important days for the distribution sector, ahead of the weekend.





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

3. TV ADVERTISERS

GROSS TV INVESTMENTS PER ECONOMICAL GROUP

Underneath the overall decline of -4%, lies a diverse group of economical sectors significant differences in their TV investments. These differences are closely linked to the broader political and economical context.

2022 was marked by the war in Ukraine. The war had an immediate effect on the supply chain for a broad range of categories. It led to an energy crisis which in turn led to an overall inflation. As a consequence, we saw the energy sector lower its investments in TV advertising. In food – the number one category in TV – we saw a drop of investments by soft drinks and snacks brands. Banks and insurance companies on the other hand invested far more compared to 2021 and pushed the services sector.

In 2022 we finally entered the "post-corona era“. Governmental communication (part of services) peaked during corona and is back at normal levels now. The same goes for e-commerce players in the distribution sector and less communication by home equipment, furniture & building materials suppliers in the home improvement category.

People prioritize their budget and one of the things they’re not cutting back on is travel. In the TV investments we see the culture & tourism sector has fully recovered and is even peaking above pre-corona levels. Other categories to have picked up on their TV investments are transport & telecom.

Economical group (in mio)	**2019**	**2020**	**2021**	**2022**	*index vs 2021*
FOOD	€ 322	€ 272	€ 379	€ 325	*86*
DISTRIBUTION	€ 186	€ 196	€ 306	€ 297	*97*
CULTURE, TOERISM, FREE TIME, SPORT	€ 184	€ 160	€ 172	€ 191	*111*
BEAUTY - HYGIENE	€ 196	€ 158	€ 197	€ 175	*89*
HEALTH - WELLBEING	€ 102	€ 104	€ 118	€ 138	*117*
TRANSPORT	€ 126	€ 80	€ 107	€ 123	*115*
SERVICES	€ 88	€ 92	€ 115	€ 118	*103*
HOME IMPROVEMENT	€ 62	€ 76	€ 114	€ 103	*90*
TELECOM	€ 77	€ 75	€ 82	€ 85	*104*
CLEANING PRODUCTS	€ 88	€ 99	€ 110	€ 81	*74*
ENERGY - FUEL	€ 19	€ 17	€ 20	€ 17	*85*
CLOTHES - ACCESSOIRES	€ 9	€ 8	€ 10	€ 14	*140*
PETS	€ 4	€ 3	€ 8	€ 9	*113*
OTHER	€ 1	€ 0	€ 1	€ 0	*0*
TOTAL	**€ 1464**	**€ 1340**	**€ 1739**	**€ 1676**	**96**

Source : Nielsen MDB

Excluded : (Associated) Manifestations/Shows, Fairs, Media/Publishers

GROSS TV INVESTMENTS – ADVERTISERS TOP 25

The top 25 advertisers, represent 36% of all TV investments. This is slightly lower compared to 2021 (39%) & 2020 (40%).

P&G and Coca-Cola still rank first and second despite a cut of around 25% in their TV investments. Ferrero (+2%) completes the podium and takes over the third position which was held by Unilever (-40%) in the previous years.
Other noticeable changes in the fast-moving category, are PepsiCo & Nestle. They almost cut their TV budgets in half, causing them to drop out of the top 25. In this sector Henkel, Reckitt & Benckiser, Mondelez and Continental Foods were able to increase their investments versus previous year.

In the distribution category, we note an increase for Delhaize (+6%), a decline for Colruyt (-11%) and a notable newcomer Aldi (+14%).
In e-commerce and "home delivery" we see Coolblue (-19%) and Hello Fresh (-20%) cutting back on their TV investments, while Bol.com grew (+9%).

All telecom parties have grown their TV investments.

Among the top car brands, we note an increase for D'Ieteren (+17%) and Renault (+14%).

Last but not least EG (+33%) joined the top25 and was the biggest grower in this list, just before Henkel (+31%).

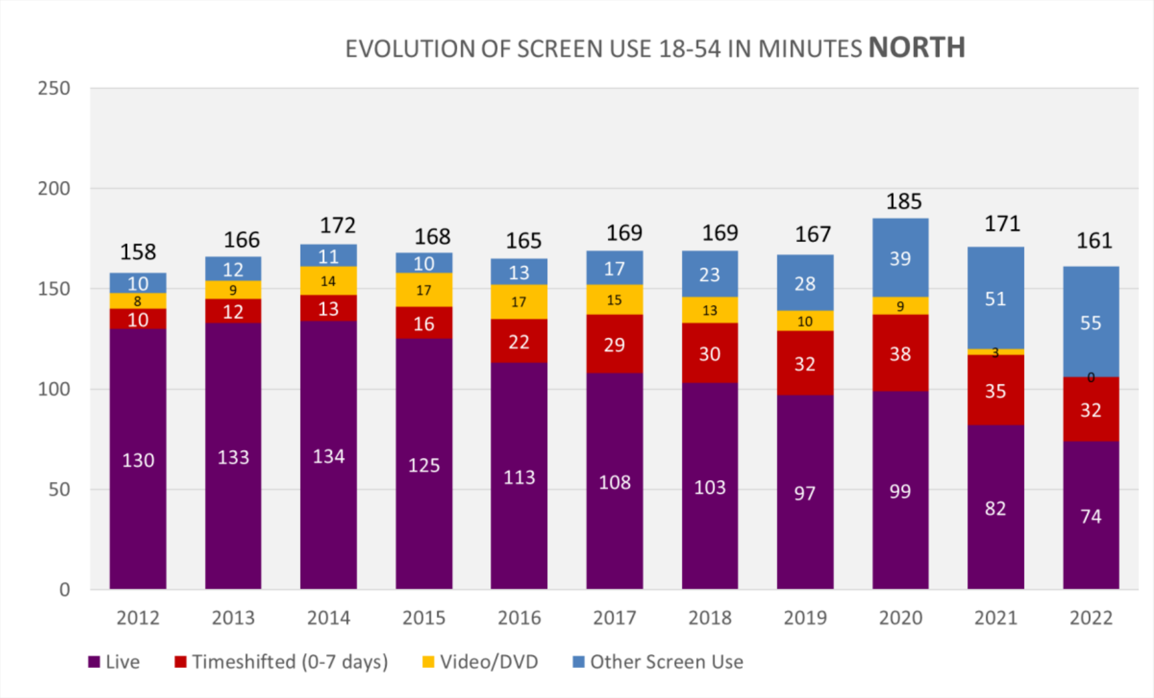
	Advertiser (in mio)	**2020**	**2021**	**2022**	*index vs 2021*
1	PROCTER & GAMBLE BENELUX	€ 110	€ 140	€ 107	*76*
2	COCA-COLA SERVICES	€ 25	€ 52	€ 38	*73*
3	FERRERO	€ 25	€ 35	€ 35	*102*
4	UNILEVER BELGIUM FOODS & HPC	€ 39	€ 52	€ 31	*60*
5	RECKITT & BENCKISER HOME CARE	€ 27	€ 31	€ 28	*92*
6	D'IETEREN AUTO	€ 8	€ 22	€ 26	*117*
7	HENKEL BELGIUM	€ 19	€ 17	€ 23	*131*
8	PROXIMUS	€ 14	€ 17	€ 22	*129*
9	NATIONALE LOTERIJ	€ 17	€ 17	€ 19	*112*
10	DELHAIZE	€ 18	€ 18	€ 19	*106*
11	RECKITT & BENCKISER HEALTHCARE	€ 19	€ 16	€ 19	*121*
12	COLRUYT	€ 14	€ 22	€ 19	*89*
13	AS WATSON	€ 16	€ 21	€ 19	*89*
14	COOLBLUE	€ 12	€ 23	€ 18	*81*
15	BOL.COM	€ 6	€ 16	€ 17	*109*
16	BEIERSDORF	€ 19	€ 22	€ 17	*78*
17	CONTINENTAL FOODS	€ 14	€ 17	€ 17	*103*
18	HELLOFRESH	€ 12	€ 20	€ 16	*80*
19	TELENET OPERATIES	€ 12	€ 15	€ 16	*107*
20	ALDI	€ 7	€ 14	€ 16	*114*
21	EG	€ 6	€ 12	€ 16	*133*
22	ORANGE	€ 13	€ 16	€ 15	*100*
23	MONDELEZ INTERNATIONAL	€ 11	€ 14	€ 15	*106*
24	RENAULT BELGIQUE LUXEMBOURG	€ 12	€ 13	€ 15	*114*
25	LEGO BELGIUM	€ 13	€ 16	€ 14	*87*

4. WATCHING (TV content) ON THE TV SCREEN

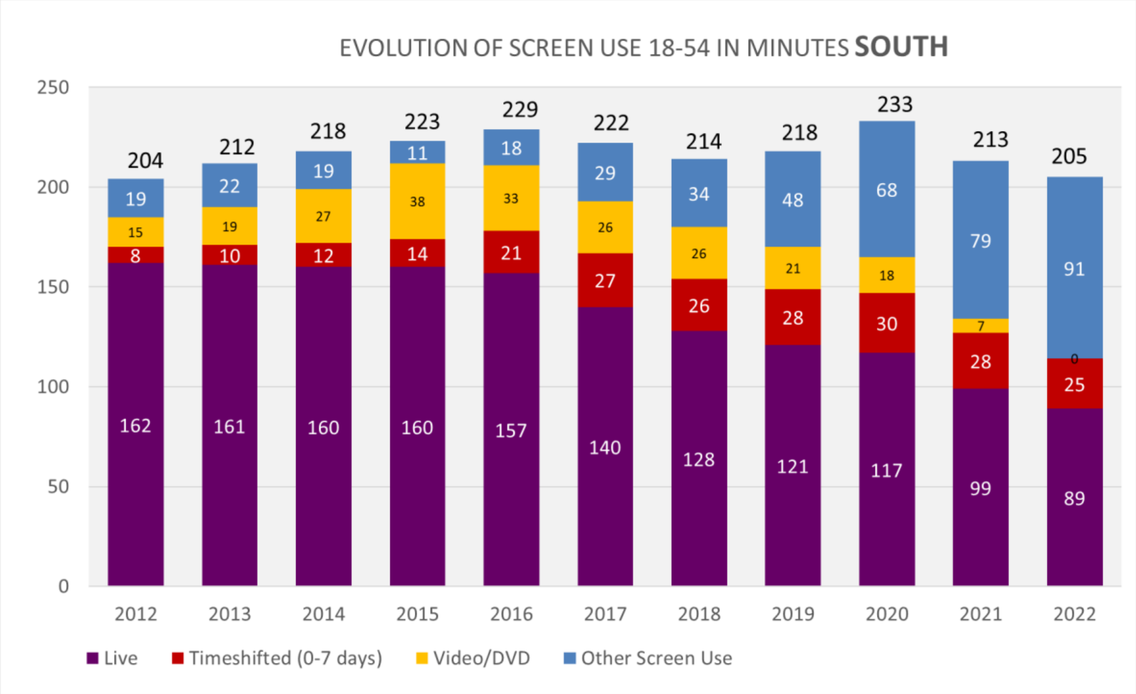
TV-SCREEN TOTAL CONSUMPION ON TARGET 18-54 YEARS

Total screen time continues to drop after the covid peak and is in 2022 a little below the pre-pandemic level. In the North, people still spend more than 2,5 hours a day behind the big screen. In the south, where screen usage is traditionally higher, this number increases to more than 3 hours a day.
The way we watch television keeps changing. The use of a “fysical” Video/DVD has been totally replaced by streaming consumption. When taking both together, the rise of “non-broadcaster viewing” over the last 3 years is rather limited : in the North from 48’ in 2020 to 55’ last year and in the South from 86’ in 2020 to 91’ in 2022.

It is the consumption of TV-channels content that continues to drop. Interesting to note is that both in the North and South viewing in timeshifted mode declines for a second year in a row (only 1 week of viewing after broadcast is measured, later viewing is considered Other screen use).
When comparing broadcaster content versus Other screen usage, the broadcasters still account for 66% of all viewing on the first screen in the North, and 56% in the South (where the actual minutes are still higher versus the North).



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total	158	166	172	168	165	169	169	167	185	171	161
Other Screen Use	10	12	11	10	13	17	23	28	39	51	55
Video/DVD	8	9	14	17	17	15	13	10	9	3	0
Timeshifted (0-7 days)	10	12	13	16	22	29	30	32	38	35	32
Live	130	133	134	125	113	108	103	97	99	82	74



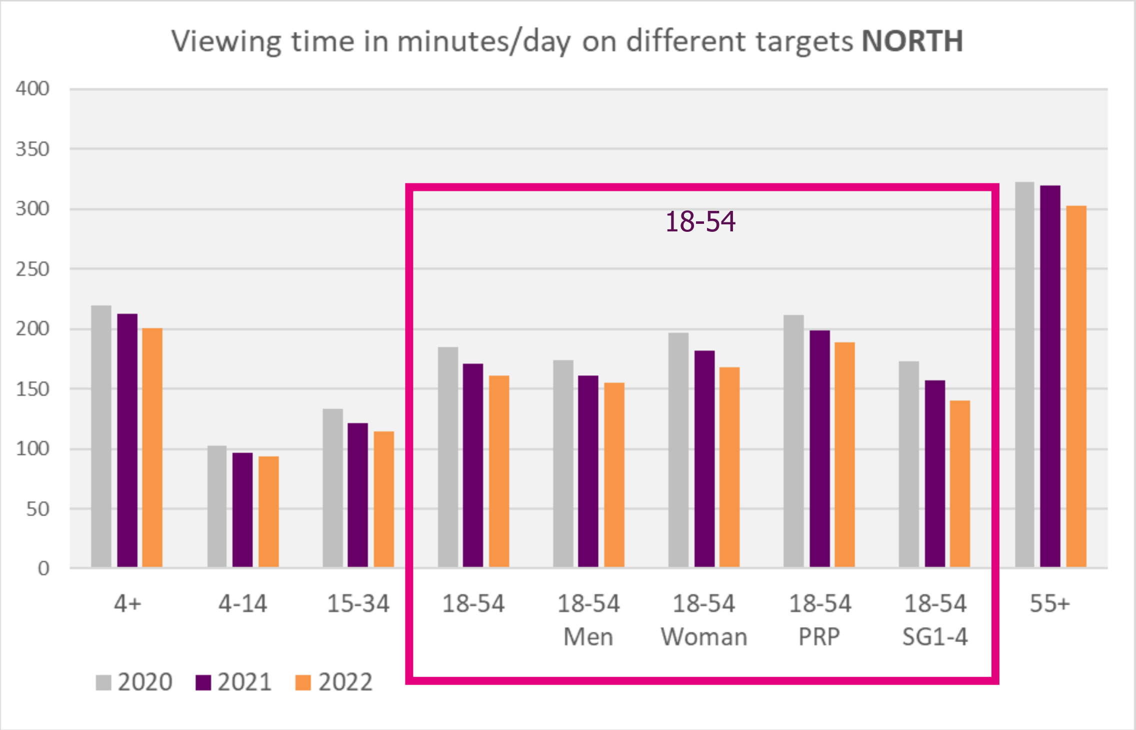
	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total	204	212	218	223	229	222	214	218	233	213	205
Other Screen Use	19	22	19	11	18	29	34	48	68	79	91
Video/DVD	15	19	27	38	33	26	26	21	18	7	0
Timeshifted (0-7 days)	8	10	12	14	21	27	26	28	30	28	25
Live	162	161	160	160	157	140	128	121	117	99	89

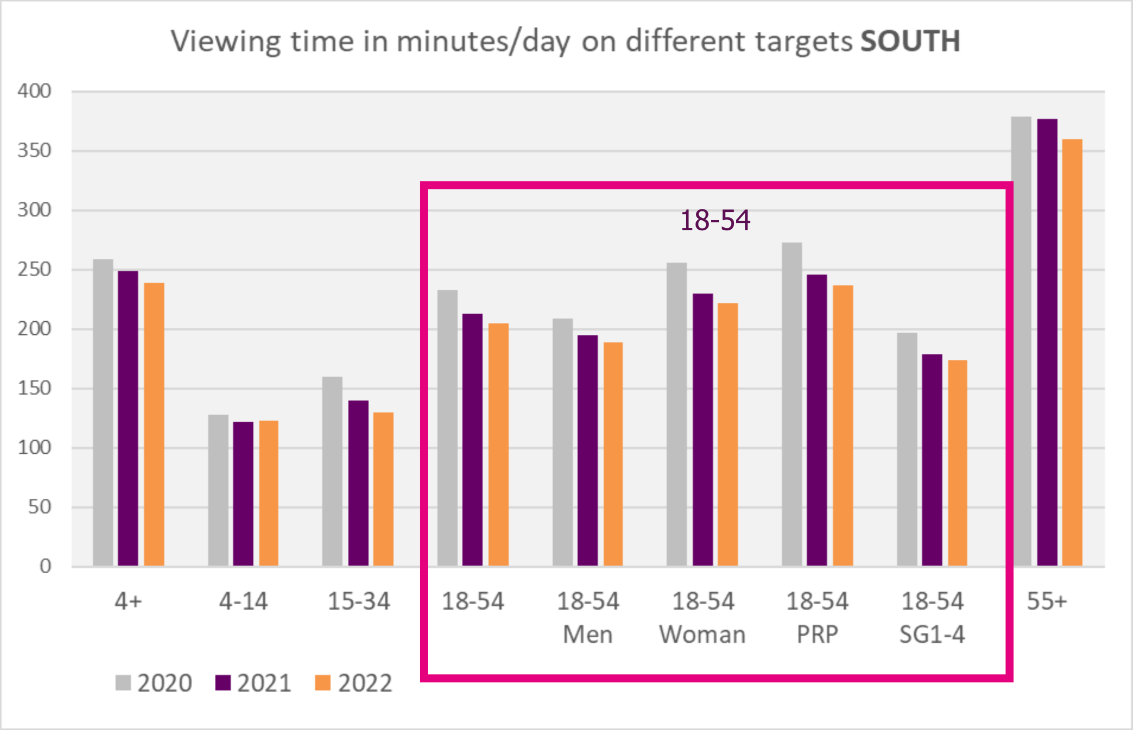
Source : CIM TV, All 18-54, Live+7, ATV

TV-SCREEN USE PER TARGET

The general trend visible in the target group 18-54, extends to (almost) all other target groups: there is a (small) decline in total viewing time compared to 2021.
Some exceptions : limited decline with children in North and South, and less with men in the North.

Looking at the main target group 18-54 and its segments we notice that women and the PRPs (Persons Responsible for Purchases: the person in the household who usually chooses the brand for food, beverages and maintenance products) have the highest viewing time.



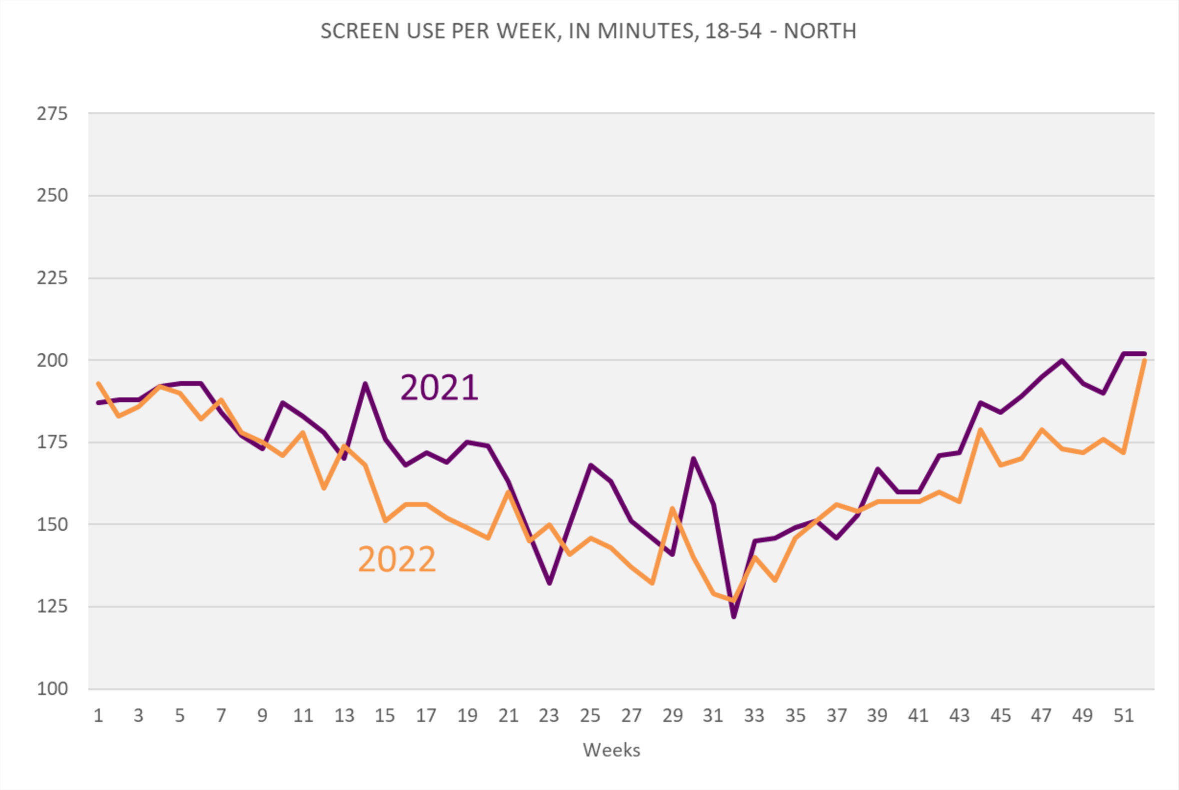


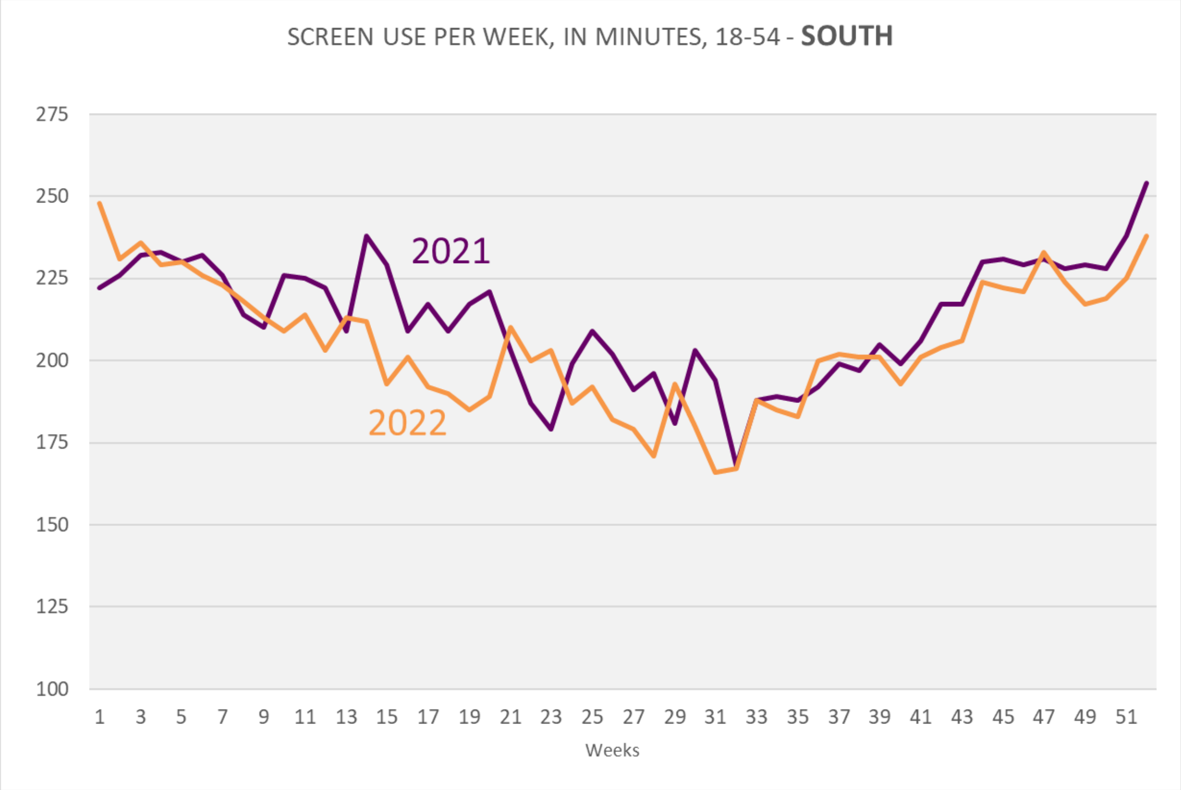
Source : CIM TV, All 18-54, Live+7, ATV

EVOLUTION OF TV SCREEN USE PER WEEK

Looking at tv consumption on a weekly basis, the typical seasonality of TV viewing shows.
Versus 2021 the viewing levels were lower in 2022 during spring and the end of the year.
The slow uptake of viewing at the start of the autumn season that was first witnessed in 2021 reproduced in 2022.

The Football Nation's League provoked a spark in June 2022, an effect that was not reproduced at the end of the year with the World cup.
Should we blame the Red Devils and their early exit?



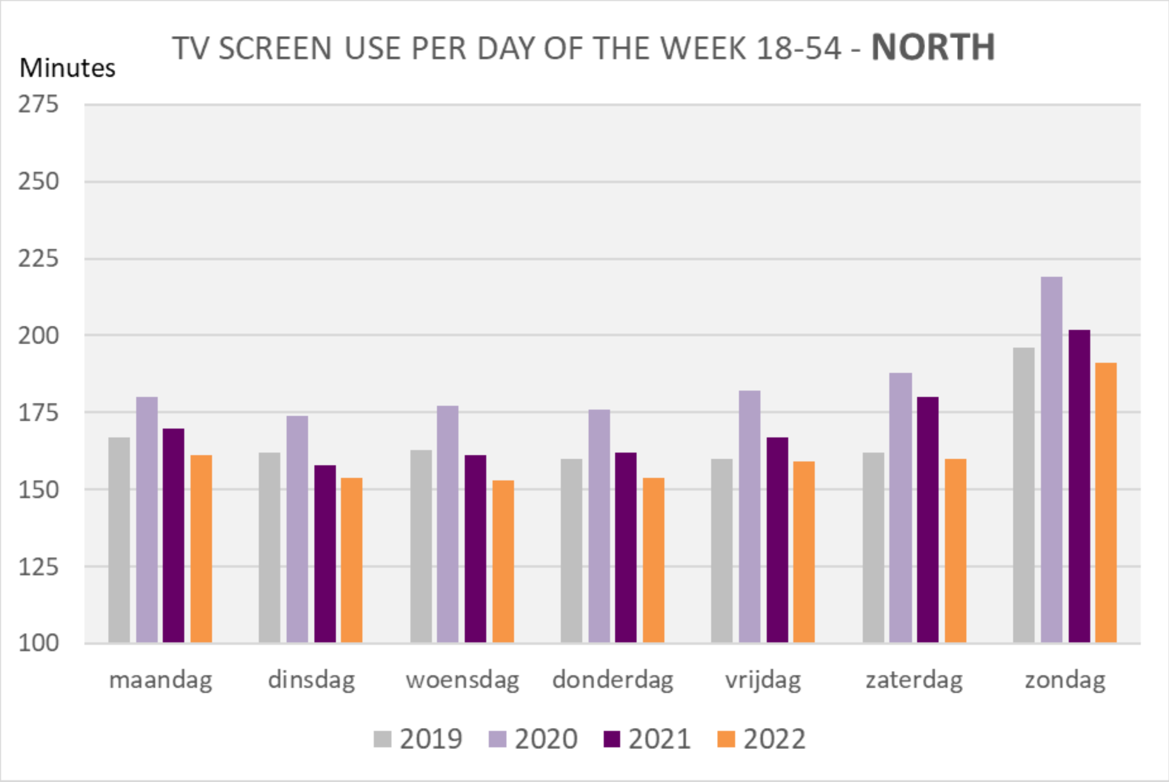


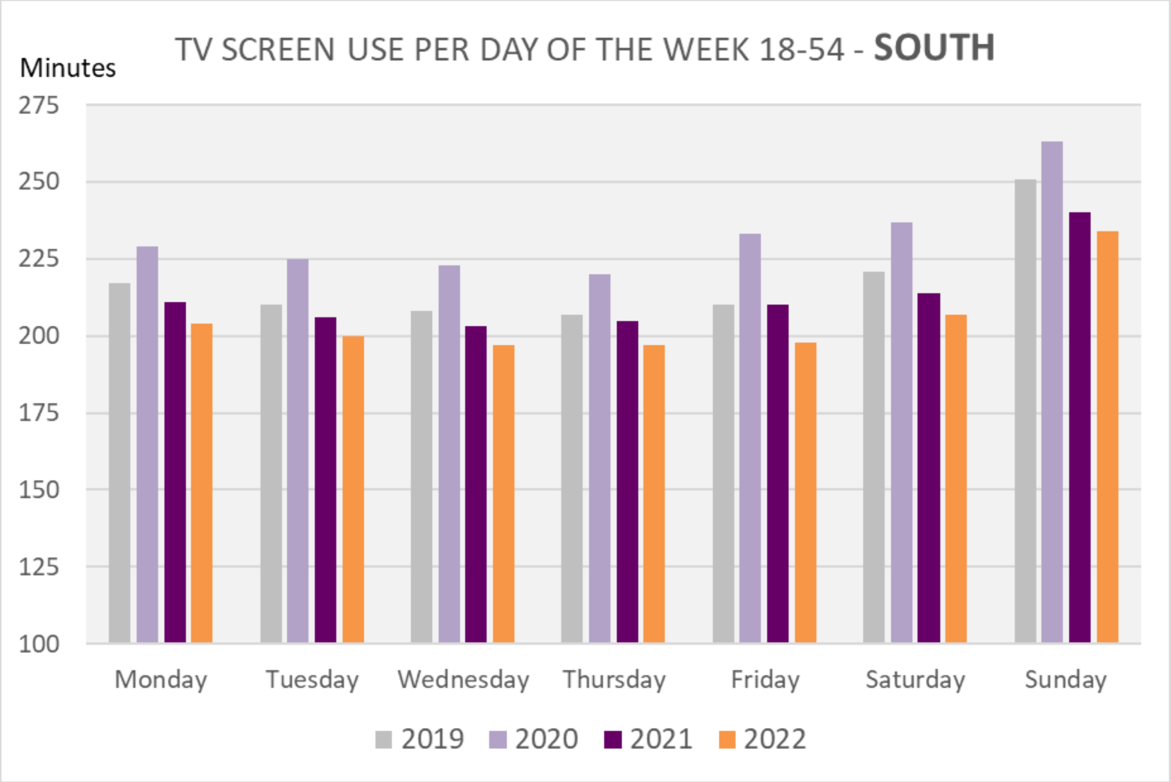
Source : CIM TV, All 18-54, Live+7, ATV

EVOLUTION OF TV-SCREEN USE PER DAG OF THE WEEK

Traditionally, people watch more TV in the weekend, with TV viewing remaining quit steady during the week while reaching a peak on Sunday. The overall trends – decline since 2020 to get to a comparable pro-covid level are reproduced per day.

In the north, the most significant decrease is on Saturday that drops to a day-of-the-week level.
In the south, such a trend was not visible. Here the biggest decrease was on Friday (-6%) and Saturday stayed the second best viewing time.



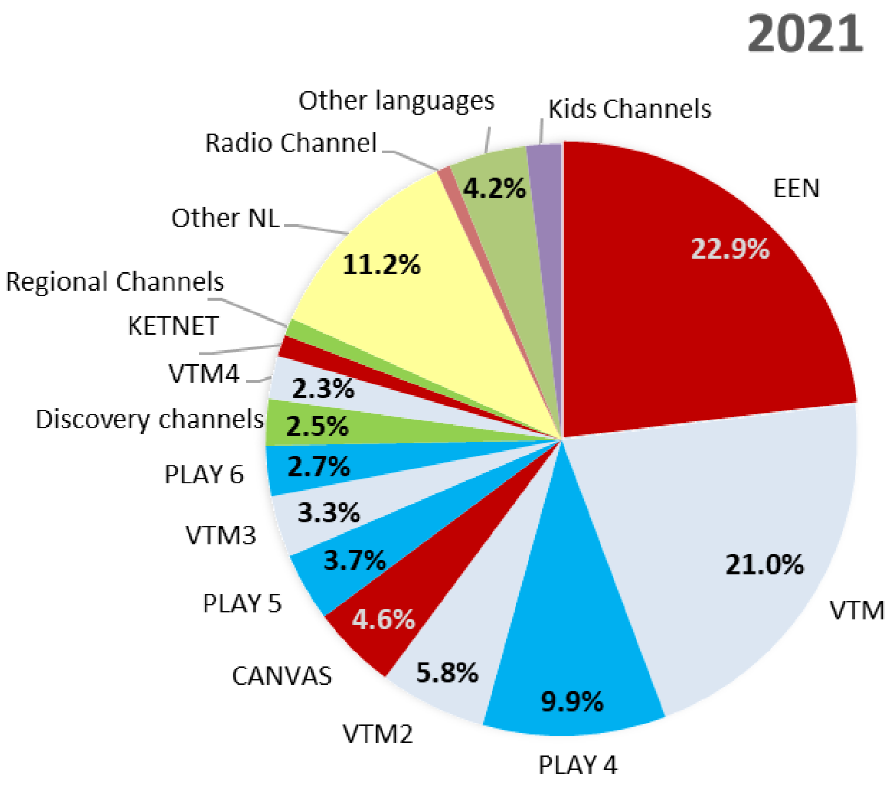


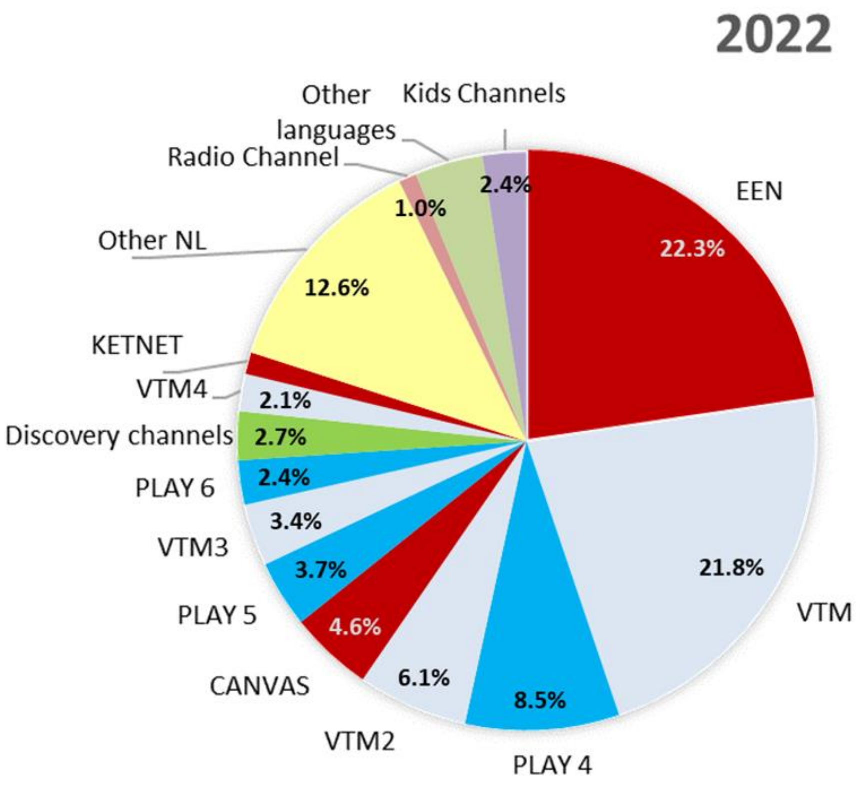
Source : CIM TV, All 18-54, Live+7, ATV

TV CHANNEL SHARES ON TARGET 18-54 IN THE NORTH

The keyword for 2022 is stability. No major changes occured and the ranking of channels did not change.
The VRT channels continue to have a strong result partly thanks to the big sport events (Tour de France, World Cup in Qatar).

The three main local broadcasters (VRT, DPG and Play Media) have a combined market share of 77%
The effect of the language remains crucial. More than 96% of the content is Dutch or has Dutch subtitles.



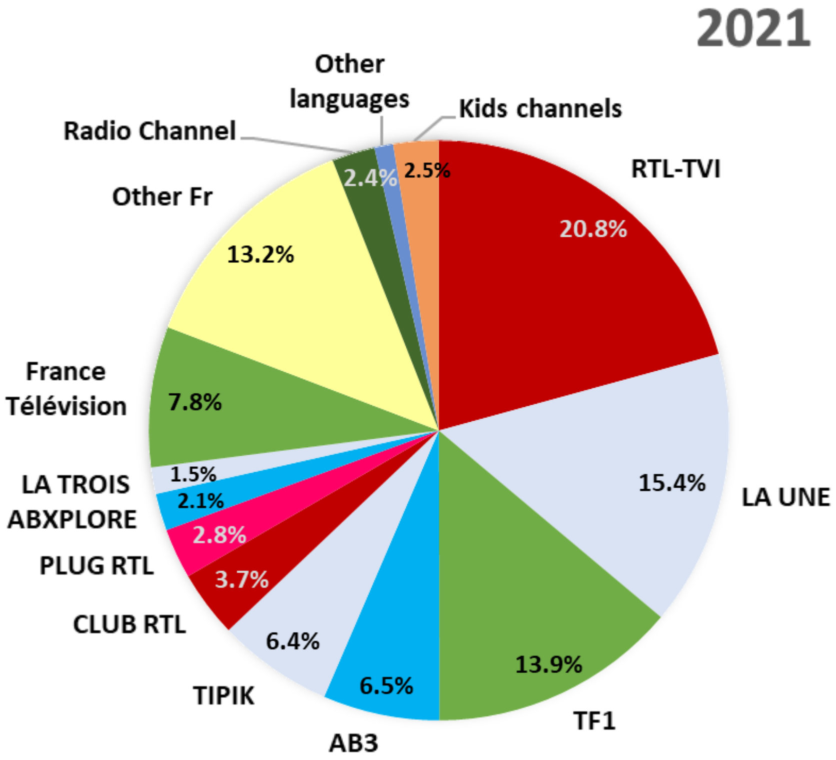


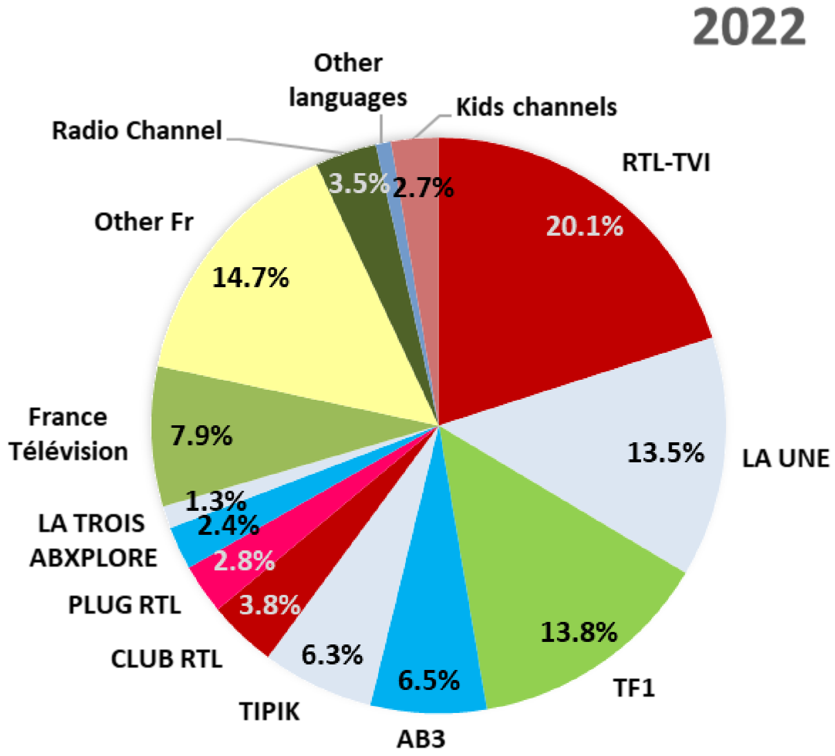
Source : CIM TV – 18-54 – Live+7 – both years ranked on 2021 results for comparability

TV CHANNEL SHARES ON TARGET 18-54 IN THE SOUTH

Also in the south the results indicate stability. There are no changes in terms of ranking.
In the southern market, only two Belgian broadcasters are active. Together they manage to attract 50% of total audience.

Despite the world cup in Qatar, we see La Une going down with almost 2 percentage points. Additionally, the other – smaller French spoken channels managed to increase their market share.
Channels in other languages have marginal share in the south.





Source : CIM TV – 18-54 – Live+7 – both years ranked on 2021 results for comparability

5. WATCHING (TV content) ON OTHER SCREENS

EVOLUTION OF THE BROADCASTER PLATFORMS - BVOD

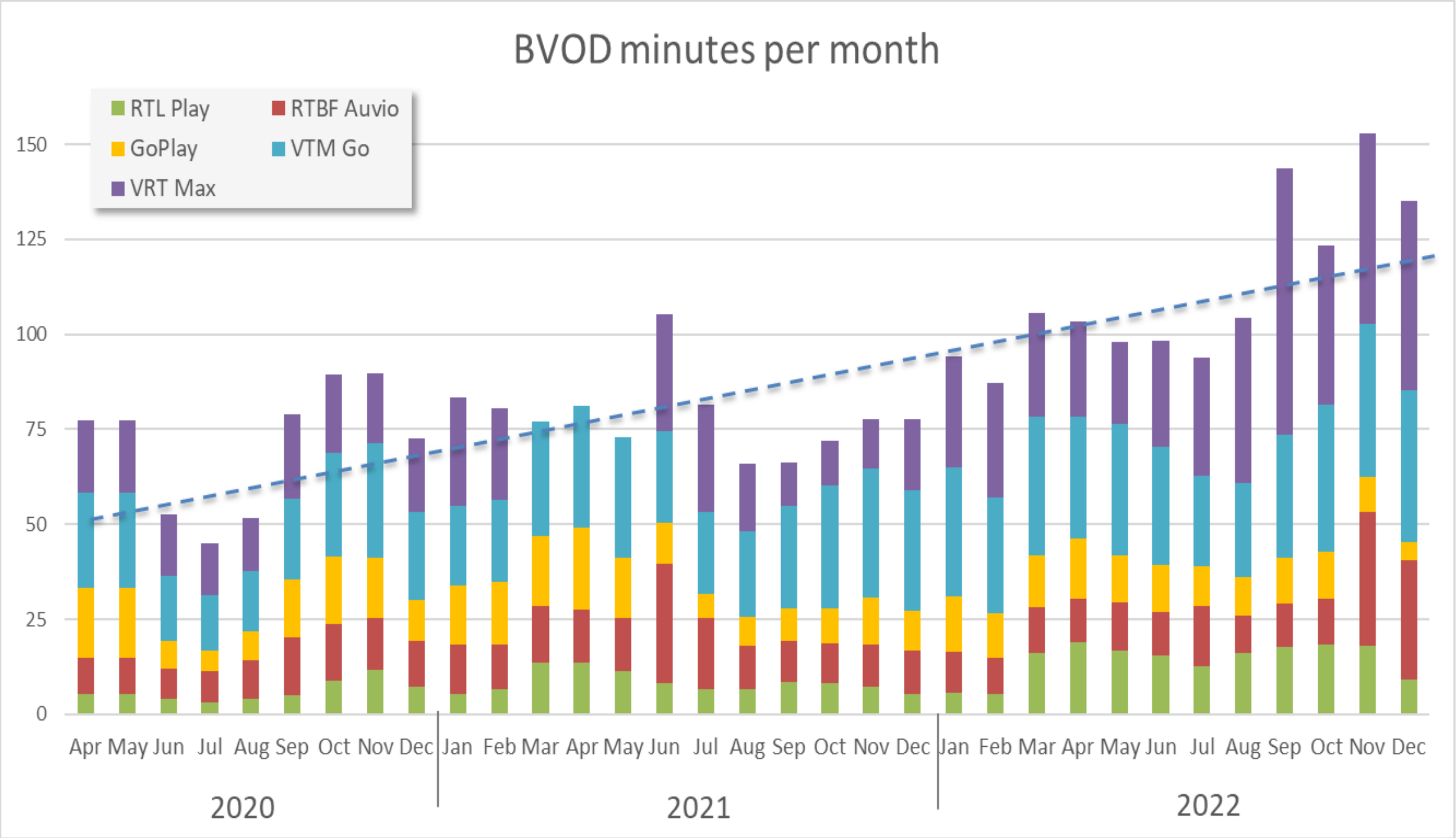
The 5 major Belgian broadcaster houses have all developed a video platform that allows both live and on-demand viewing of their programs. These so-called BVOD platforms (Broadcaster Video On Demand) focus exclusively on video (there is no written content) and they offer full episodes of programs.

When looking at the long term evolution, the overall progression of the 5 BVOD services combined is 37% on an annual basis.

In terms of look & feel, they are fully comparable to the Subscription bases Video On Demand platforms (SVOD).

In general, a clear positive evolution can be observed. CIM Gemius has streaming figures available since April 2020.

Live sports viewing is an important catalyst for use – we can see peaks in summer 2021 (Euro Championship, Olympic Games) and the end of 2022 (Worldcup) (on VRT and RTBF Auvio) In September 2022 VRT rebranded its VRT Nu service to VRT Max with success. This explains the peak in September

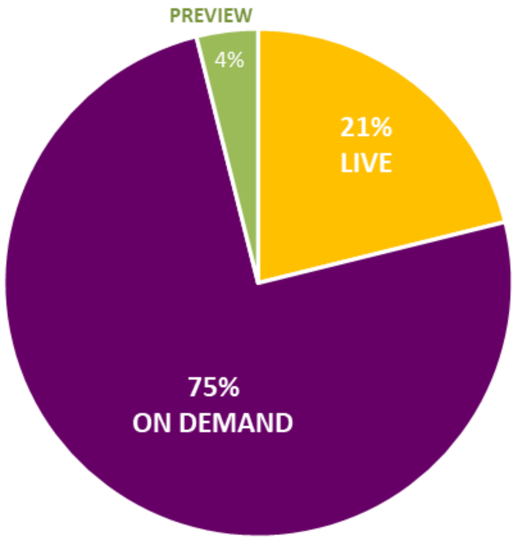


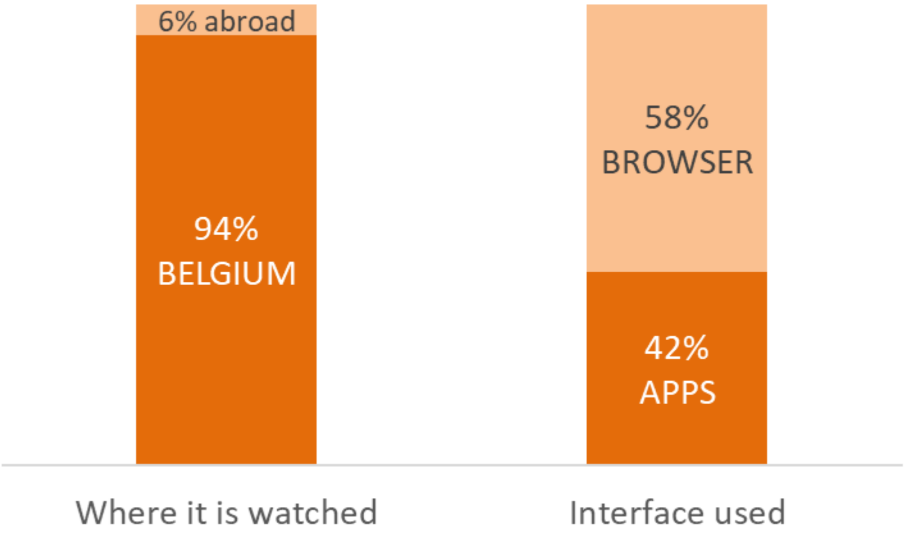
Source : CIM Internet, All 18-54, Video only, Domestic only.

ONLINE VIEWING OF TV CONTENT

All TV content that is seen online 28 days after broadcast is tagged and added to the TV screen results to generate a total picture.
On BVOD platforms it is possible to see Live TV, this accounts for about 1/5 of the viewing.
Most viewing is in “on demand modus”, on the time and place of the consumer. In some cases, it is possible to see TV content in preview on the BVOD platform – or to binchwatch further episodes after the first broadcast. This account for 4% and is most important in the North

Most of the online viewing takes place in Belgium - but it remains an excellent way to stay into contact with local content when abroad.
The browser use still prevails, but app use is on the rise.





Source : CIM OVC, all viewing (Domestic & Foreign), total population

TOP 25 ONLINE VIEWING OF TV CONTENT

When ranking the most popular TV content that was watched online, the picture is very different in the North versus the South.
While such platforms remain an excellent way to watch Live events like football, we see in the North only 6 matches popping up in the Top25, while in the South sport dominates the ranking.

The other consumption mode is of course to rewatch "on your time and place" a TV programme that aired a few days before. This is important in the North, while in the South we see (a few) programme's from smaller channels popping up in the top.

NORTH	Programme	Original broadcast Channel	Original broadcast Date	Live+28 days in 000
1	DE MOL	PLAY4	20/03/2022	143 722
2	TWEE ZOMERS	EEN	13/03/2022	129 623
3	VB. WK. SCHIFT. - KROATIE/BELGIE	EEN	01/12/2022	108 546
4	NONKELS	PLAY4	10/05/2022	84 578
5	DE ALLERSLIMSTE MENS TER WERELD	PLAY4	05/09/2022	82 014
6	DE VERRADERS	VTM	07/02/2022	79 376
7	DERTIGERS	EEN	17/02/2022	79 325
8	BLIND GETROUWD	VTM	17/10/2022	78 739
9	BLIND GEKOCHT	PLAY4	07/04/2022	78 491
10	VB. WK. 1/2F - FRANKRIJK/MAROKKO	EEN	14/12/2022	77 215
11	VB. WK. FIN - ARGENTINIE/FRANKRIJK	EEN	18/12/2022	73 814
12	DE VERHULSTJES	PLAY4	14/02/2022	72 893
13	THE MASKED SINGER	VTM	14/01/2022	72 196
14	CHANTAL	EEN	25/09/2022	71 978
15	VB. WK. SCHIFT. - BELGIE/CANADA	EEN	23/11/2022	69 984
16	VB. WK. SCHIFT. - BELGIE/MAROKKO	EEN	27/11/2022	67 280
17	DOWN THE ROAD	EEN	03/10/2022	66 213
18	FAMILIE	VTM	29/08/2022	61 539
19	K3, EEN JAAR LATER	VTM	26/11/2022	58 889
20	DE AFTOCHT VAN...	VTM2	20/02/2022	56 292
21	UNDERCOVER	EEN	02/01/2022	55 928
22	VB. WK. 1/2F - ARGENTINIE/KROATIE	EEN	13/12/2022	54 277
23	LISA	VTM	21/02/2022	51 834
24	TABOE	EEN	02/01/2022	51 414
25	HET JACHTSEIZOEN	VTM	01/09/2022	49 772

SOUTH	Programme	Original broadcast Channel	Original broadcast Date	Live+28 days in 000
1	FOOT. CM. 1/2F - FRANCE/MAROC	TIPIK	14/12/2022	69 759
2	FOOT. CM. FIN - ARGENTINE/FRANCE	LA UNE	18/12/2022	67 216
3	FOOT. CM. ELIM. - BELGIQUE/CANADA	LA UNE	23/11/2022	51 895
4	FOOT. CM. ELIM. - BELGIQUE/MAROC	LA UNE	27/11/2022	50 712
5	FOOT. CM. 1/4F - ANGLETERRE/FRANCE	TIPIK	10/12/2022	44 427
6	FOOT. CM. ELIM. - CROATIE/BELGIQUE	LA UNE	01/12/2022	44 398
7	FOOT. CM. 1/8F - MAROC/ESPAGNE	TIPIK	06/12/2022	44 387
8	FOOT. CM. 1/4F - MAROC/PORTUGAL	TIPIK	10/12/2022	43 900
9	FOOT. CM. 1/2F - ARGENTINE/CROATIE	TIPIK	13/12/2022	41 442
10	LES CINQUANTE	PLUGRTL	05/09/2022	37 897
11	FOOT. CM. 1/4F - CROATIE/BRESIL	TIPIK	09/12/2022	36 995
12	LES APPRENTIS AVENTURIERS	PLUGRTL	16/05/2022	35 242
13	FOOT. CM. 1/4F - PAYS-BAS/ARGENTINE	TIPIK	09/12/2022	32 451
14	ICI TOUT COMMENCE	LA UNE	14/02/2022	31 590
15	FOOT. CM. ELIM. - MAROC/CROATIE	TIPIK	23/11/2022	29 009
16	LE CROSS	PLUGRTL	14/11/2022	28 897
17	LES MARSEILLAIS AU MEXIQUE	PLUGRTL	04/03/2022	28 894
18	FOOT. CM. ELIM. - FRANCE/AUSTRALIE	TIPIK	22/11/2022	28 800
19	FOOT. CM. ELIM. - BRESIL/SERBIE	TIPIK	24/11/2022	28 439
20	FOOT. CM. ELIM. - ESPAGNE/ALLEMAGNE	TIPIK	27/11/2022	26 381
21	FOOT. CM. ELIM. - ARGENTINE/ARABIE	TIPIK	22/11/2022	25 430
22	FOOT. CM. 1/8F - JAPON/CROATIE	TIPIK	05/12/2022	25 405
23	FOOT. CM. 1/8F - FRANCE/POLOGNE	TIPIK	04/12/2022	25 110
24	FOOT. CM. ELIM. - PORTUGAL/GHANA	TIPIK	24/11/2022	24 443
25	F1. CHAMP.M. GP. BAHREIN	TIPIK	20/03/2022	24 207

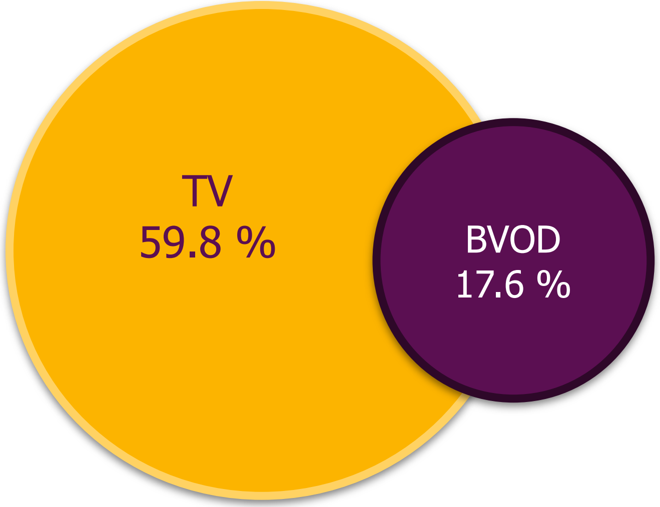
Source : CIM OVC, all viewing (Domestic & Foreign), total population

BVOD CREATES EXTRA REACH FOR TV ADVERTISING

Advertising on BVOD has a similar quality level compared to TV. BVOD platforms are focused on the same long form content (like TV) and advertising is also full screen (like TV).
As the BVOD platforms offer live viewing but also the long tail with "unlimited" catchup it offers extra viewing possibilities. And last but not least, it is free. For advertising purposes this all makes BVOD a natural complement to TV, by adding other screens

The new CIM ToVA planner allows to calculate the combined reach of BVOD with TV for an average campaign on the target group 18-54. The plan below is based on an investment of 330 GRP with a budget split of 90%-10% TV/BVOD.
With only 10% extra investment, the reach grows from 59.8% to 67.2% in the North. In the South the incremental reach is lower but the potential is growing.

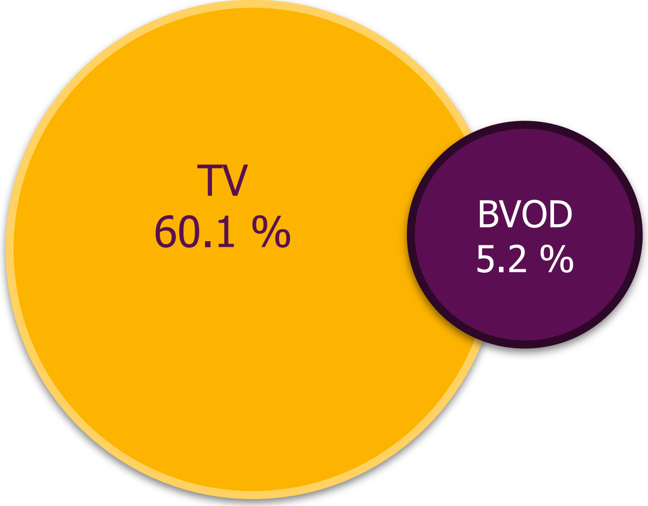
NORTH



+ 7.4 % incremental

TOTAL REACH 67.2 %

SOUTH



+ 2.1 % incremental

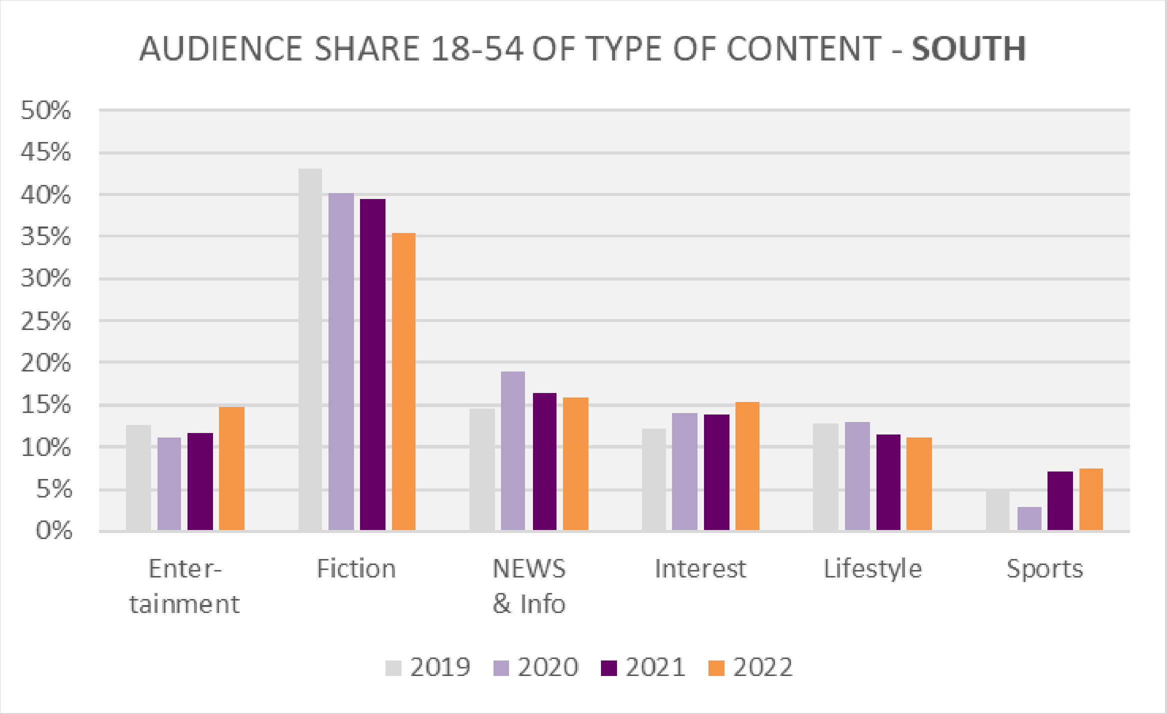
TOTAL REACH 62.2 %

Source : CIM ToVA planner, on 18-54, April 2022. 330 grp? Budget split : TV : 90%, BVOD 10%

6. TV CONTENT

SHARE OF TYPE OF TV CONTENT, SOUTH, 18-54

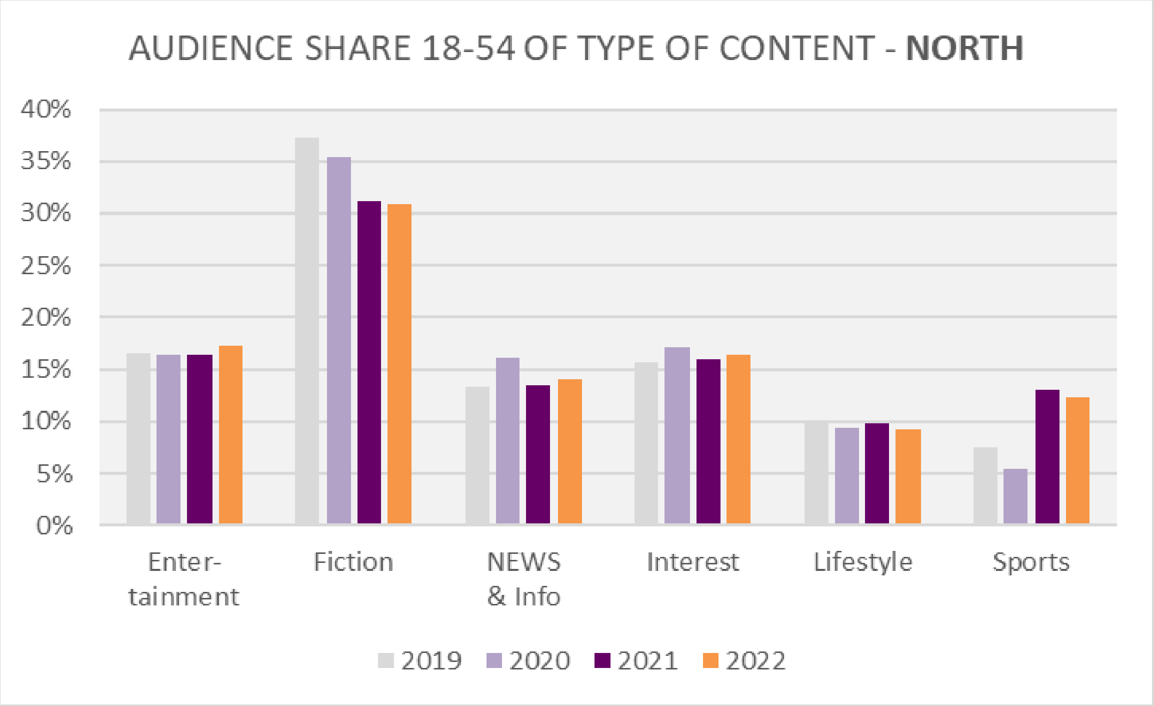
Based on the typology of content that is produced in the CIM TAM, we can define which type of program gets the most viewing on a certain target.
Fiction is still the largest category in 2022 but is in a declining trend comparing to the previous years.
General news is still at a higher level than in the pre-covid period but is also declining since 2020. The increase in sports in 2021 was maintained in 2022, thanks to the football tournaments.
Entertainment, Lifestyle and Interest content are on a positive trend.



SOUTH	2019	2020	2021	2022
Entertainment Game show	5%	5%	5%	6%
Entertainment other	2%	2%	2%	2%
Entertainment Music	5%	4%	5%	6%
Fiction drama	8%	7%	7%	6%
Fiction action/adventure	12%	11%	11%	10%
Fiction comedy	10%	9%	8%	7%
Fiction other	3%	3%	3%	3%
Fiction Police/Detective	10%	9%	8%	8%
Fiction Soap	0%	0%	2%	1%
General news+specials	12%	16%	13%	13%
Information	3%	3%	3%	3%
Interest Human/society	8%	9%	10%	11%
Interest other	4%	5%	4%	5%
Lifestyle cooking	4%	4%	3%	3%
Lifestyle decoration	2%	2%	2%	2%
Lifestyle other	7%	7%	6%	7%
Sports cycling	1%	0%	1%	1%
Sports Football	2%	1%	5%	5%
Sports other	2%	1%	2%	2%
TOTAL	100%	100%	100%	100%

SHARE OF TYPE OF TV CONTENT, NORTH, 18-54

Fiction is also the largest category in the North, but in a smaller proportion than in the South. The downward trend since 2019 is stabilizing but comedies and soap are still decreasing.
Entertainment still represents a significant part of the viewing in the North and benefits from an increase comparing to 2021.
General news is on a positive trend compared to pre-covid.
2022 being also a sports year, the category remains at a similar level to 2021 but is slightly down due to less interest in football than the previous year.

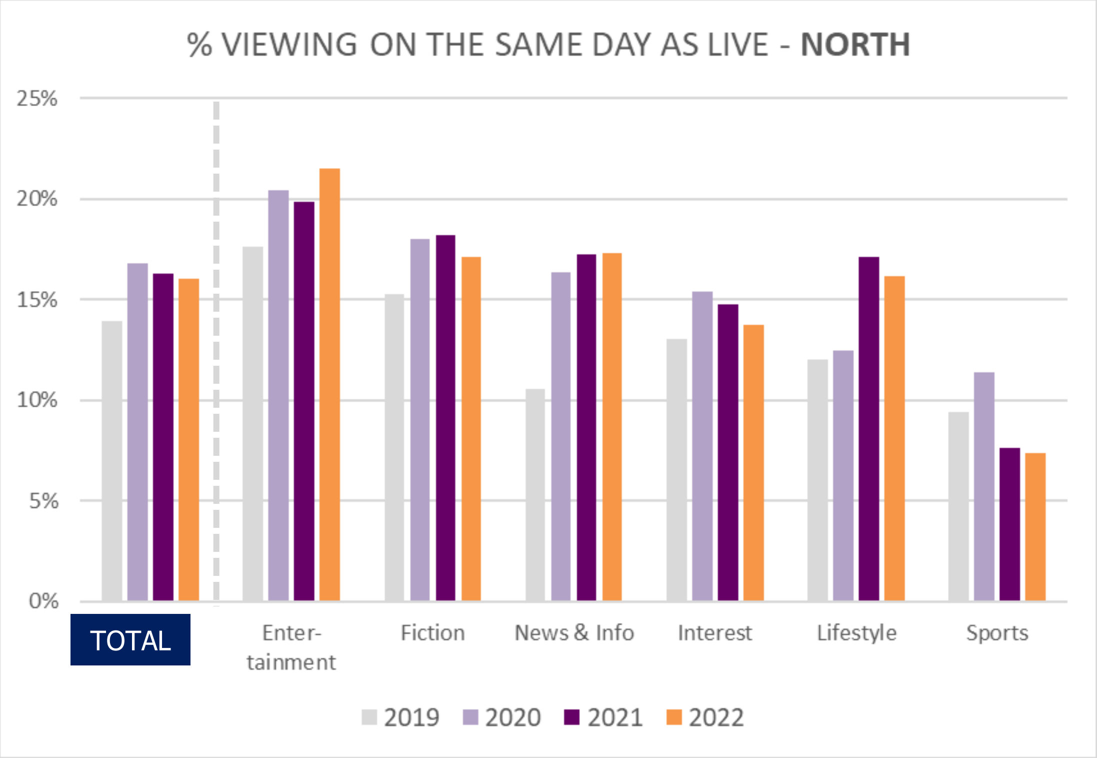


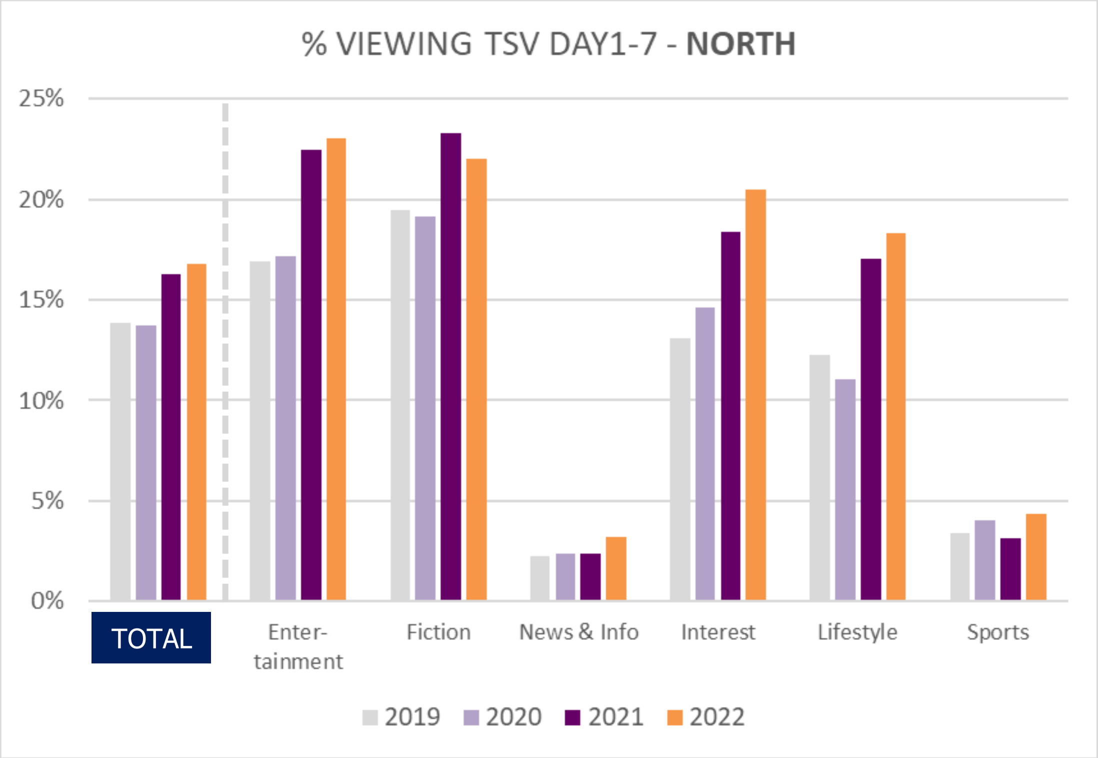
NORTH	2019	2020	2021	2022
Entertainment Game show	5%	6%	6%	6%
Entertainment other	2%	3%	4%	5%
Entertainment Music	9%	8%	6%	6%
Fiction drama	8%	8%	6%	6%
Fiction action/adventure	9%	8%	6%	6%
Fiction comedy	7%	7%	7%	6%
Fiction other	2%	2%	2%	2%
Fiction Police/Detective	6%	6%	5%	6%
Fiction Soap	5%	4%	4%	5%
General news+specials	9%	12%	10%	11%
Information	4%	4%	3%	3%
Interest Human/society	11%	13%	12%	13%
Interest other	4%	4%	4%	3%
Lifestyle cooking	3%	4%	3%	3%
Lifestyle decoration	1%	1%	2%	2%
Lifestyle other	5%	5%	5%	5%
Sports cycling	3%	2%	3%	4%
Sports Football	3%	2%	6%	5%
Sports other	2%	1%	4%	3%
TOTAL	100%	100%	100%	100%

TIME SHIFTED VIEWING IN THE NORTH, 18-54

The total volume of timeshifted viewing has already been presented earlier in the report and now broken down in 2 components : viewing on the same day of broadcast (VOSDAL) and viewing later in the week. VOSDAL is lightly going down in favour of viewing the days after.
On the same day there is a relatively fair share for each type of content with a preference for entertainment that is even growing. Sports remains a typical event to view live.

CIM only measures the viewing from day 1 to day 7 – after that viewing is not detected and becomes "unknown". This type of viewing is more pronounced in some types of content. Sports and news content lose a lot of value if not consumed on the same day. Entertainment and fiction, on the other hand, lend themselves very well to timeshifted viewing, although fiction is slightly down. Interest and Lifestyle are showing a great growth compared to previous years

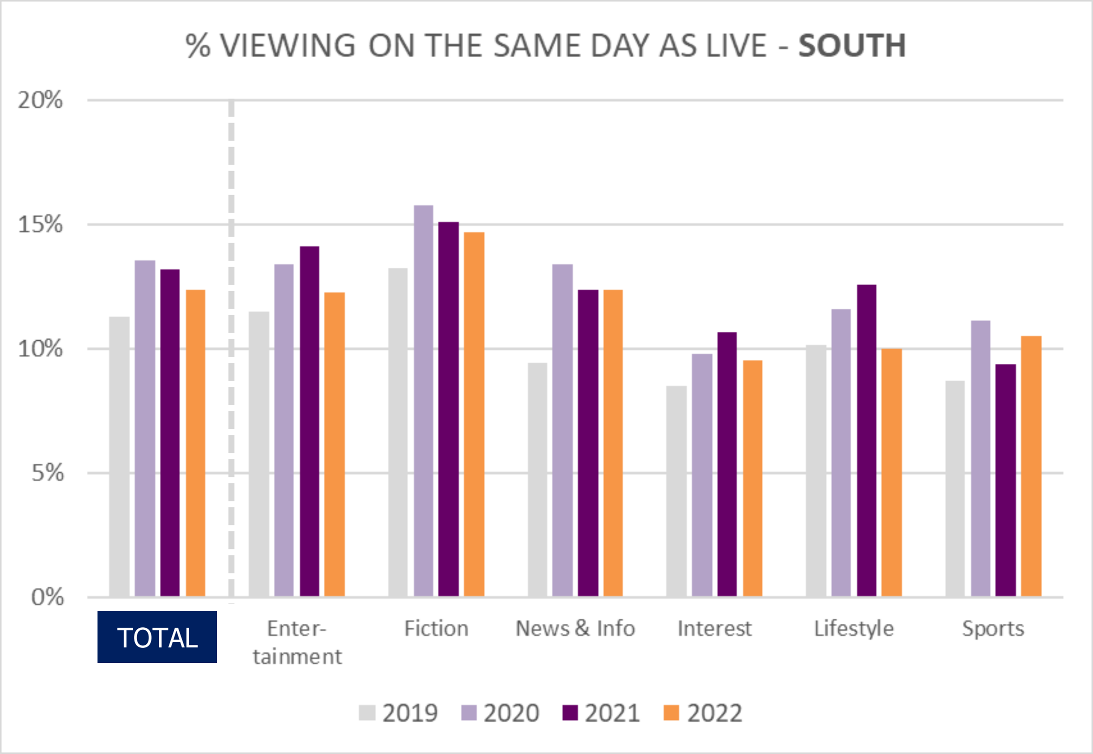


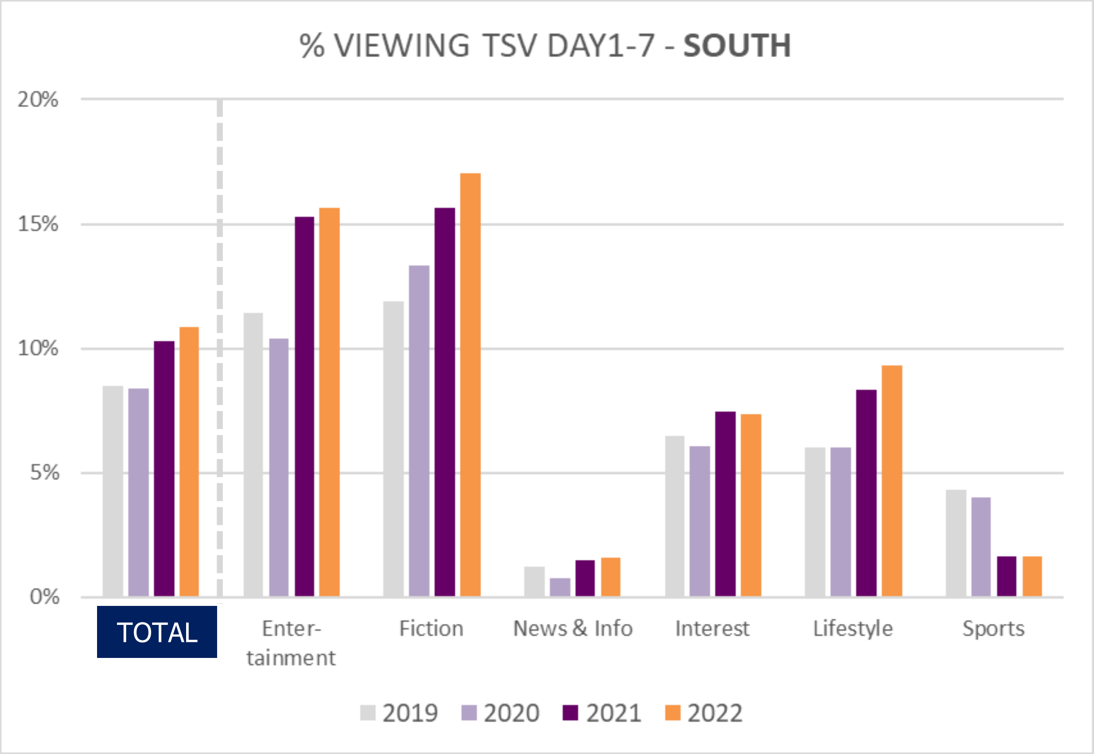


TIME SHIFTED VIEWING IN THE SOUTH, 18-54

In the South, we have a similar view, with slight differences.
The total level of TSV is lower than in the North.
Here too, same-day delayed viewing is at a similar level regardless of the type of content. There is also a certain levelling out going on since last year, with the exception of sports even higher than in 2021, which again has to do with the strong "live" sports in 2022.

In the days following the broadcast, there is still a lot of difference depending on the type of content.
News and sports are even more neglected than in the North
As in the North, we still see in increase in this viewing behaviour in 2022





TOP 25 TV PROGRAMMES – TOTAL VIDEO VIEW (ON 4+) - NORTH

A program title can only appear once at the top of the most watched programs – it is the most watched episode that is in the list. However, a football match is always considered a separate program. And not without importance: this is the official top25 published by the CIM. And it does so on the total 4+ population.
Since 2022 it is not only the viewing on the TV Screen that is taken into account, but also the online viewing on other screens (see also the ranking above). The complete top 100 for the North can be found on the CIM website.

In the North, The World Cup is in the top 25 with 6 matches but only 4 in the top 10 which represents a drop compared to the EURO in 2021.

VTM tops the list with in the second episode of The Masked Singer which had the highest rating on the channel in five years.

EEN occupies the other 9 places in the top 10 with programs like Taboe and Factchekers.

Play4 falls just outside the Top 10 with the second episode of De Mol season 10.

In total, EEN takes 22 places in the ranking.

NORTH	Programme	Channel	Date	Average in 000
1	THE MASKED SINGER	VTM	28/01/2022	1.905,3
2	VB. WK. SCHIFT. - BELGIE/CANADA	EEN	23/11/2022	1.893,7
3	TABOE	EEN	09/01/2022	1.767,7
4	VB. WK. SCHIFT. - BELGIE/MAROKKO	EEN	27/11/2022	1.764,1
5	VB. WK. FIN - ARGENTINIE/FRANKRIJK	EEN	18/12/2022	1.680,8
6	FACTCHECKERS	EEN	11/01/2022	1.604,3
7	VB. WK. SCHIFT. - KROATIE/BELGIE	EEN	01/12/2022	1.597,9
8	TWEE ZOMERS	EEN	06/02/2022	1.585,3
9	CHATEAU PLANCKAERT	EEN	20/02/2022	1.580,4
10	REIZEN WAES, NEDERLAND	EEN	03/01/2022	1.468,7
11	DE MOL	PLAY4	27/03/2022	1.422,8
12	CHANTAL	EEN	18/09/2022	1.422,4
13	VB. WK. 1/2F - FRANKRIJK/MAROKKO	EEN	14/12/2022	1.380,4
14	ANDERMANS ZAKEN	EEN	31/01/2022	1.349,3
15	VREDE OP AARDE	EEN	05/01/2022	1.347,3
16	REIZEN WAES, WERELDSTEDEN	EEN	17/04/2022	1.336,5
17	THUIS	EEN	01/02/2022	1.310,8
18	DOWN THE ROAD	EEN	29/08/2022	1.285,4
19	UNDERCOVER	EEN	09/01/2022	1.260,6
20	DWARS DOOR DE LAGE LANDEN	EEN	18/04/2022	1.239,0
21	HET 7 UUR-JOURNAAL	EEN	24/02/2022	1.229,3
22	DE ALLERSLIMSTE MENS TER WERELD	PLAY4	10/11/2022	1.209,5
23	WIELRENNEN. RONDE VAN VLAANDEREN	EEN	03/04/2022	1.193,9
24	HET HUIS - WIM LYBAERT	EEN	12/12/2022	1.179,8
25	SWITCH	EEN	05/01/2022	1.170,9

TV : **Live+7+Guests+OVC** = number of viewers 4+ and guests, live + time shifted viewing up to 7 days after broadcast, plus all online viewing of the program on other screens

TOP 25 TV PROGRAMMES – TOTAL VIDEO VIEW (ON 4+)- SOUTH

Again, a program title can only appear once at the top of the most watched program. However, a football match is always considered a separate program.
This is the official top25 published by the CIM. Since 2022 it is not only the viewing on the TV Screen that is taken into account, but also the online viewing on other screens (see also the ranking above). All viewing is on total 4+ population. The complete top 100 in the South can be found on the CIM website (www.cim.be)

In the South, Football is very dominant with no less than 14 places in the Ranking. The World Cup matches against Canada, Morocco and Croatia on La Une make up the top 3 of 2022.

News reports did gather a lot of attention in 2022 especially in February when the Ukrainian War started which made the 19H on RTL-TVI stand at the 6th position. Same goes for the special edition on la Une which slipped to 8th place.

National channels like Tipik, RTL-TVI and La Une share the most places in the ranking. The only French channel in the top is TF1, which appears in 16th place with the singing contest Star Academy.

Below the 15th place, we find some fiction series and magazines alongside the other World Cup matches.

SOUTH	Programme	Channel	Date	Average in 000
1	FOOT. CM. ELIM. - BELGIQUE/CANADA	La Une	23/11/2022	1.232,3
2	FOOT. CM. ELIM. - BELGIQUE/MAROC	La Une	27/11/2022	1.058,7
3	FOOT. CM. ELIM. - CROATIE/BELGIQUE	La Une	01/12/2022	1.024,8
4	FOOT. CM. FIN - ARGENTINE/FRANCE	La Une	18/12/2022	968,6
5	FOOT. CM. 1/2F - FRANCE/MAROC	Tipik	14/12/2022	935,3
6	RTL INFO 19H	RTL-TVI	28/02/2022	722,7
7	FOOT. NATIONS LEAGUE - BELGIQUE/POLOGNE	RTL-TVI	08/06/2022	713,6
8	EDITION SPECIALE - LE 19.30	La Une	24/02/2022	706,1
9	FOOT. CM. 1/4F - ANGLETERRE/FRANCE	Tipik	10/12/2022	700,4
10	FOOT. CM. 1/2F - ARGENTINE/CROATIE	Tipik	13/12/2022	694,0
11	FOOT. NATIONS LEAGUE - POLOGNE/BELGIQUE	RTL-TVI	14/06/2022	681,0
12	FACE AU JUGE	RTL-TVI	06/02/2022	650,7
13	RTL INFO EDITION SPECIALE	RTL-TVI	27/02/2022	646,6
14	LE 19.30	La Une	01/03/2022	641,5
15	HPI, HAUT POTENTIEL INTELLECTUEL	La Une	24/05/2022	633,3
16	STAR ACADEMY	TF1	15/10/2022	631,7
17	FOOT. NATIONS LEAGUE - BELGIQUE/PAYS DE GALLES	RTL-TVI	22/09/2022	628,1
18	FOOT. NATIONS LEAGUE - PAYS-BAS/BELGIQUE	RTL-TVI	25/09/2022	612,2
19	FOOT. NATIONS LEAGUE - BELGIQUE/PAYS-BAS	RTL-TVI	03/06/2022	599,5
20	PAOLA, COTE JARDIN	La Une	18/02/2022	592,3
21	FOOT. NATIONS LEAGUE - PAYS DE GALLES/BELGIQUE	RTL-TVI	11/06/2022	590,5
22	ENQUETES	RTL-TVI	22/02/2022	569,6
23	JEUDI EN PRIME	La Une	24/02/2022	556,0
24	FOOT. CM. 1/4F - PAYS-BAS/ARGENTINE	Tipik	09/12/2022	552,0
25	MARIES AU PREMIER REGARD	RTL-TVI	03/04/2022	551,1

TV : **Live+7+Guests+OVC** = number of viewers 4+ and guests, live + time shifted viewing up to 7 days after broadcast, plus all online viewing of the program on other screens

7. OTHER CONTENT

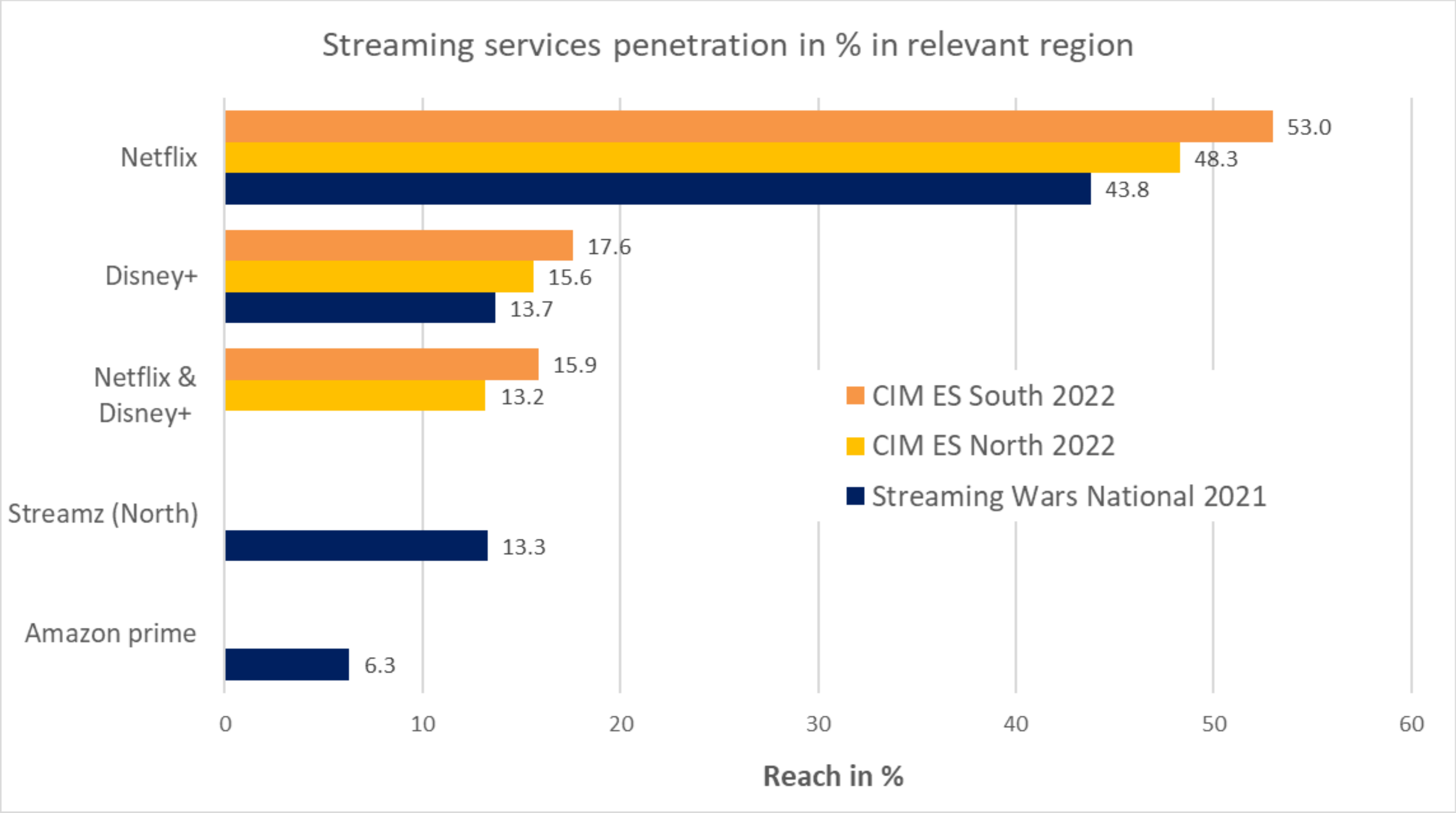
▶ OTHER CONTENT – SCOPE OF THE STREAMING SERVICES

As shown before, the section “other screen use” of the TV screen has grown to considerable proportions. The actual measurement method does not allow to identify the platform, nor the volumes attached to it.
As these platforms have well know brand names, declarative surveys can give an idea of their relative importance.

Netflix is clearly the leader, with even higher penetration in CIM.
When looking at Disney+, only few people adopt this services without subscribing to Netflix first.
In the North the local Streamz service is close to Disney+ penetration.
From GroupM we learn that Amazon prime is still small, but probably more important in the South.

We have 2 recent sources available that draw a picture but they need to be taken with caution.
GroupM produced 3 waves of it’s “Streaming Wars” survey, generating only national figures about “watching the last 2 months”.
The CIM has published a new wave of it’s Establishment survey and asked about app/site use the last month. We suppose that people also include there TV screen viewing in their answer….
A small note about Amazon: we did not retain the outcome as we consider the result too much biased towards the e-commerce site, not towards Prime, the video service.

Overall we see a bigger adoption of the platforms in the South versus the North. This is no surprise as overall first screen use is 205’ while it is only 161’ in the North.



Sources : CIM Establishment Survey July 2021- June 2022, “Used App/Site the last month” and GroupM’s Streaming Wars, September 2021, “watched the last 2 months”

VIA TV Report 2022

www.thinkvia.be

VIA Association of AV Media

ABOUT VIA

VIA Association of AV Media

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

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