

# THE 2023 REPORTS

TV

Cinema

Radio

# VIA TV Report 2023

## AGENDA

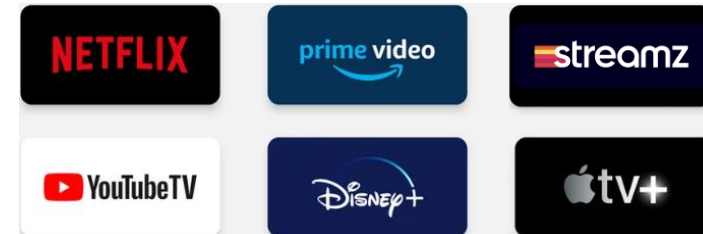
1. What is TV ?
2. TV Investments
3. Watching on the TV-screen
4. Broadcasters Content on the TV screen
5. Broadcasters Content Online
6. Other content

# ▶ WHAT IS TV

## A DEVICE



## TYPE OF CONTENT



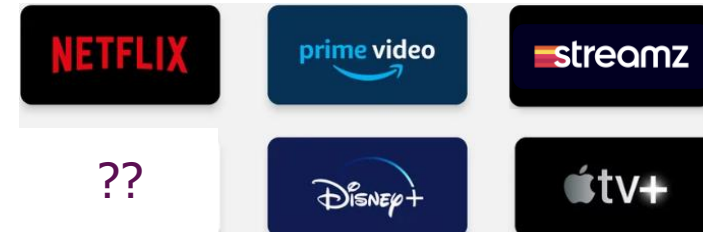
## TYPE OF CONTENT



### FIT FOR TV

Content that is produced to quality standards that include:

- Editorial input and oversight
- Regulatory compliance, or an intention to deliver content that aligns with prevailing regulation
- Content that provides a safe and suitable environment for advertisers

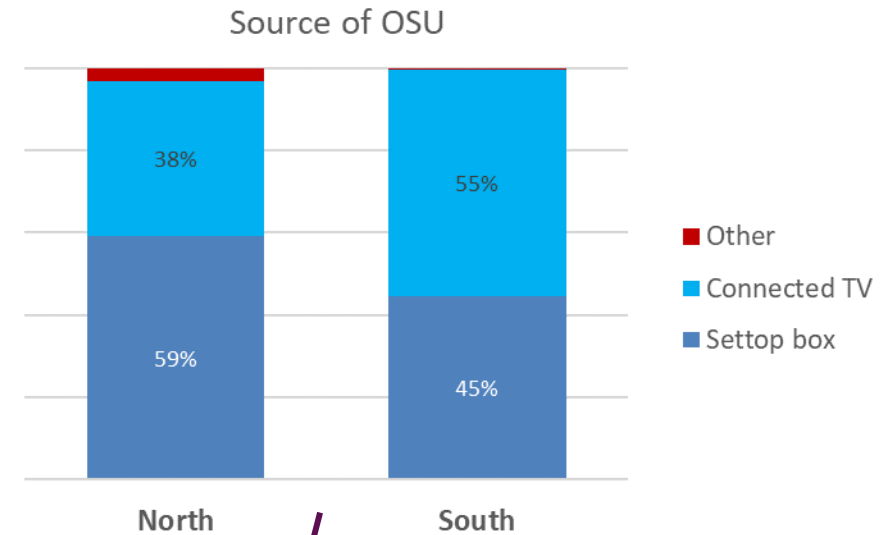


▶ THE CIM TV STUDY



Starting 2024, the TSV will be measured up to 28 days (available soon)

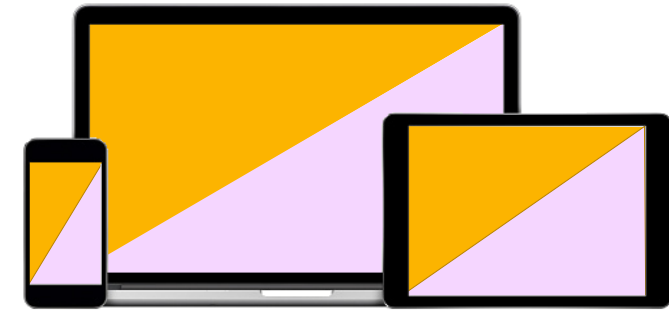
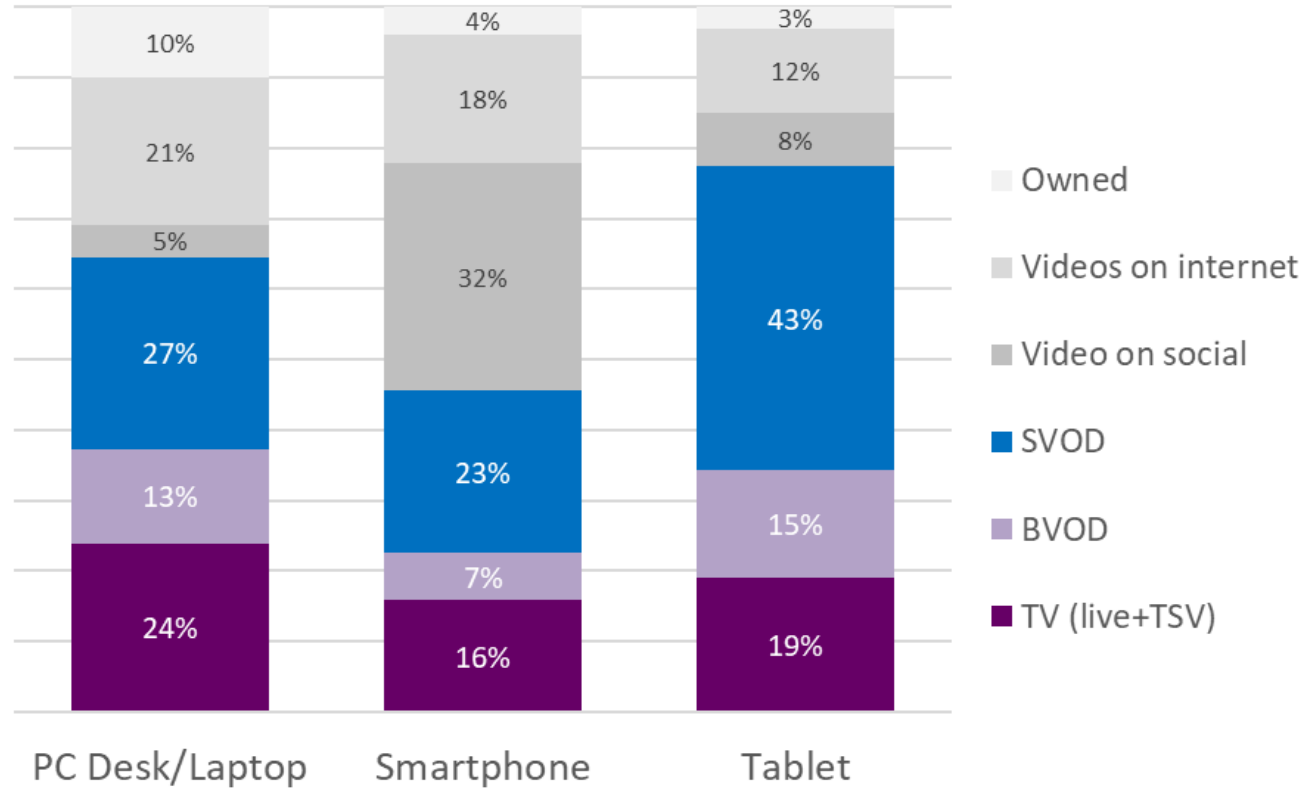
Actually reported as "other screen use"  
No details, except source



CIM is actually testing the implementation of a Router solution to measure internet streaming inhome This would disclose the volume of different apps/sites

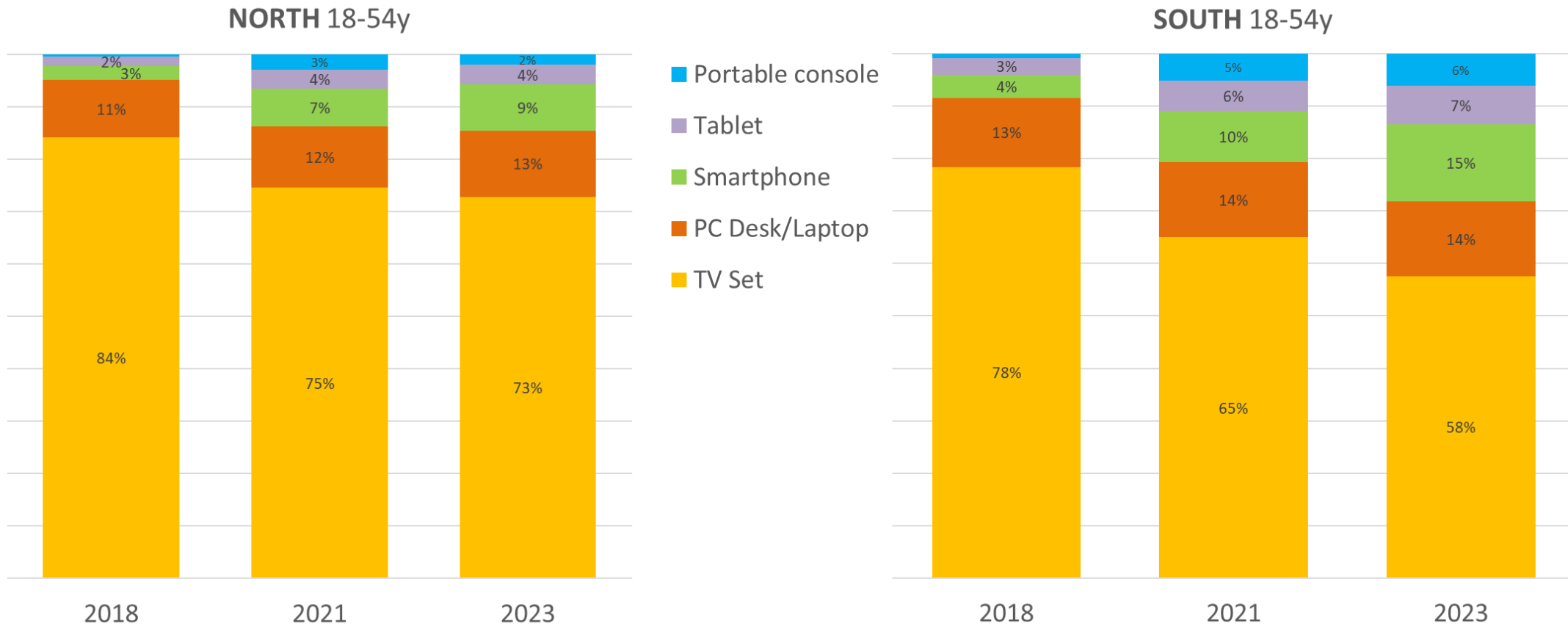
# ▶ WATCHING ONLINE TOTAL VIDEO ON OTHER SCREENS

Video content consumption of 18-54 per device



# ▶ THE BIG SHIFT FROM THE BIG SCREEN TO OTHER SCREENS

## EVOLUTION OF "PREMIUM LONG FORM CONTENT" (TV Live+TSV, BVOD, SVOD)



Source : Video Observer 2018, 2021 (IP Belgium), 2023 (RTL & VIA), 18-54y

## 2. TV INVESTMENTS



► Keyfacts



Increased dynamic in number of # commercials used per brand  
Average spotlength is 20"

Number of :	2019	2020	2021	2022	2023	<i>Index vs 2022</i>
Advertisers	1,178	1,036	1,120	1,168	1,144	98
Brands	2,035	1,570	1,685	1,766	1,651	93
Commercials	12,059	11,697	13,479	14,252	14,755	104
New Commercials	10,698	10,403	12,019	12,632	13,459	107
Commercials/Brand	5.9	7.5	8.0	8.1	8.9	111
Spotlength (spots only)	20.5"	21.3"	19.9"	20.1"	20.0"	100



## ► Keyfacts (spots only – no billboards)

	2019	2020	2021	2022	2023	Index vs 2022
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### North (spots only)

Number of channels	34	36	38	40	42	105
Spots	2,886,554	2,569,036	3,925,919	4,159,544	4,350,827	105
Spots/channel/day	233	195	283	285	284	100
GRP 18-54	883,195	819,584	889,080	831,040	730,971	88
GRP per spot	0.31	0.32	0.23	0.20	0.17	84

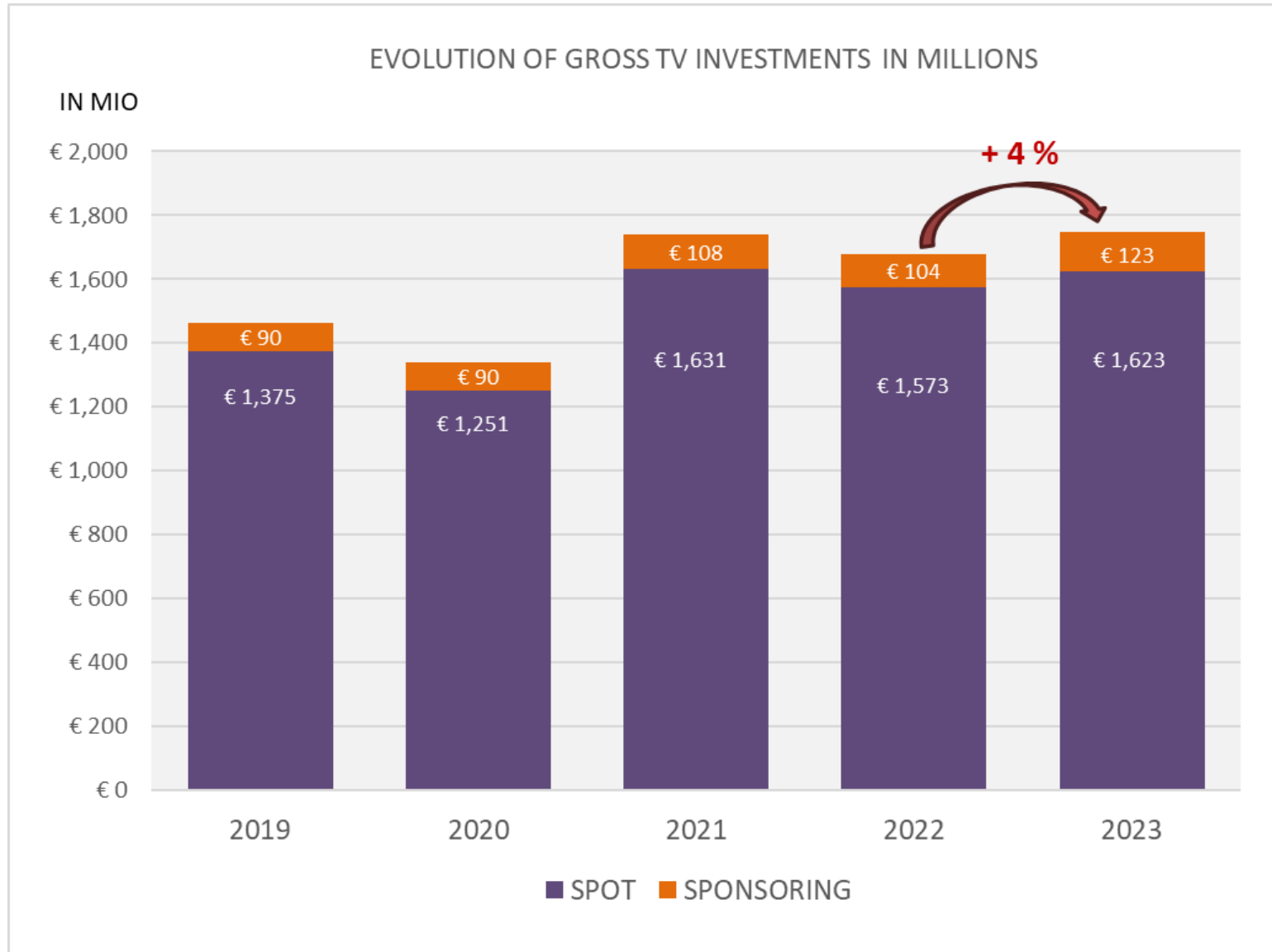
### South (spots only)

Number of channels	21	24	24	24	24	100
Spots	1,100,784	1,105,509	1,360,366	1,437,267	1,444,723	101
Spots/channel/day	144	126	155	164	165	101
GRP 18-54	755,747	690,606	778,452	696,190	623,354	90
GRP per spot	0.69	0.62	0.57	0.48	0.43	89

Growing number of spots.

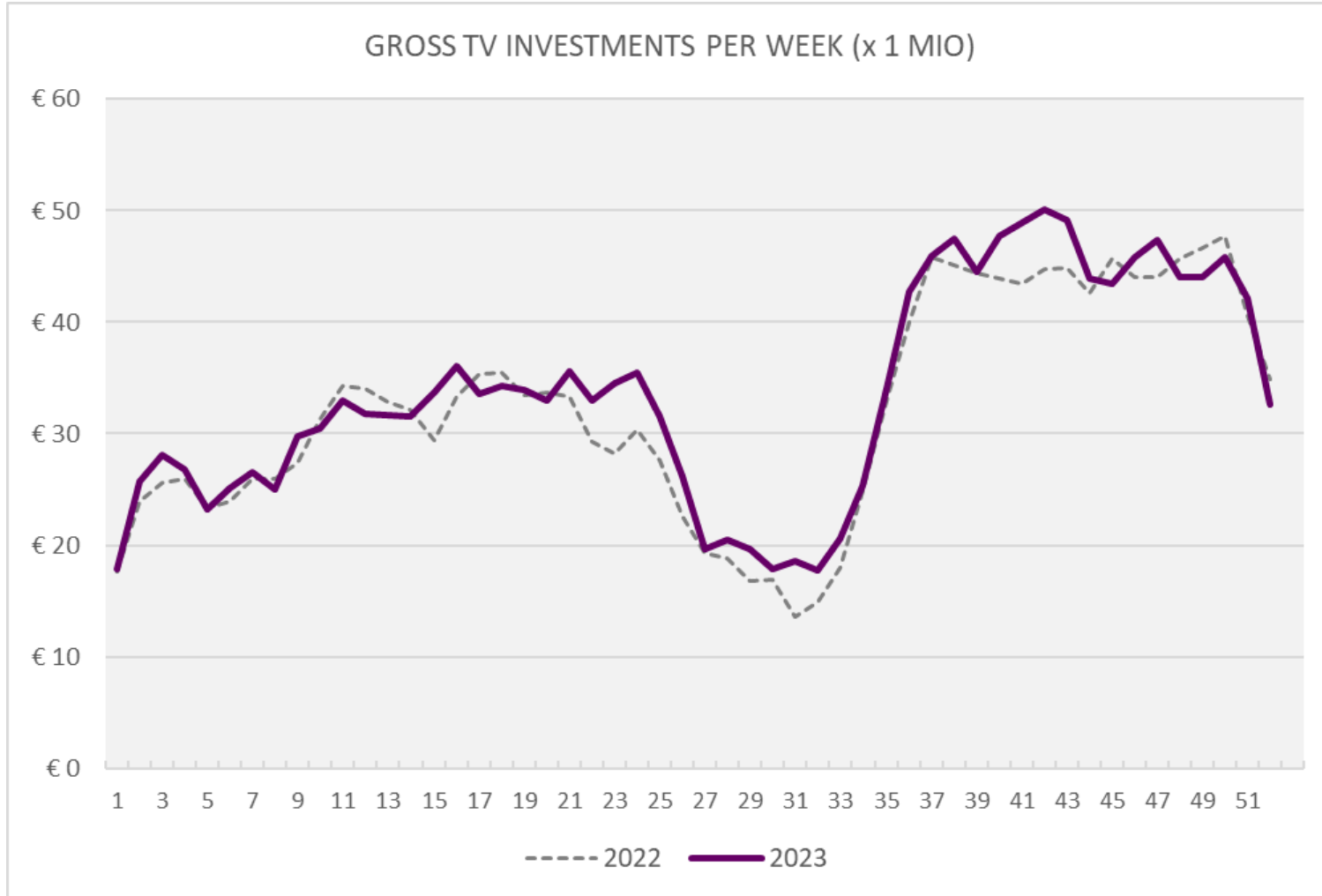
Decline of GRP  
Decline of GRP/Spot

## ▶ TV ADVERTISING. GROSS INVESTMENTS

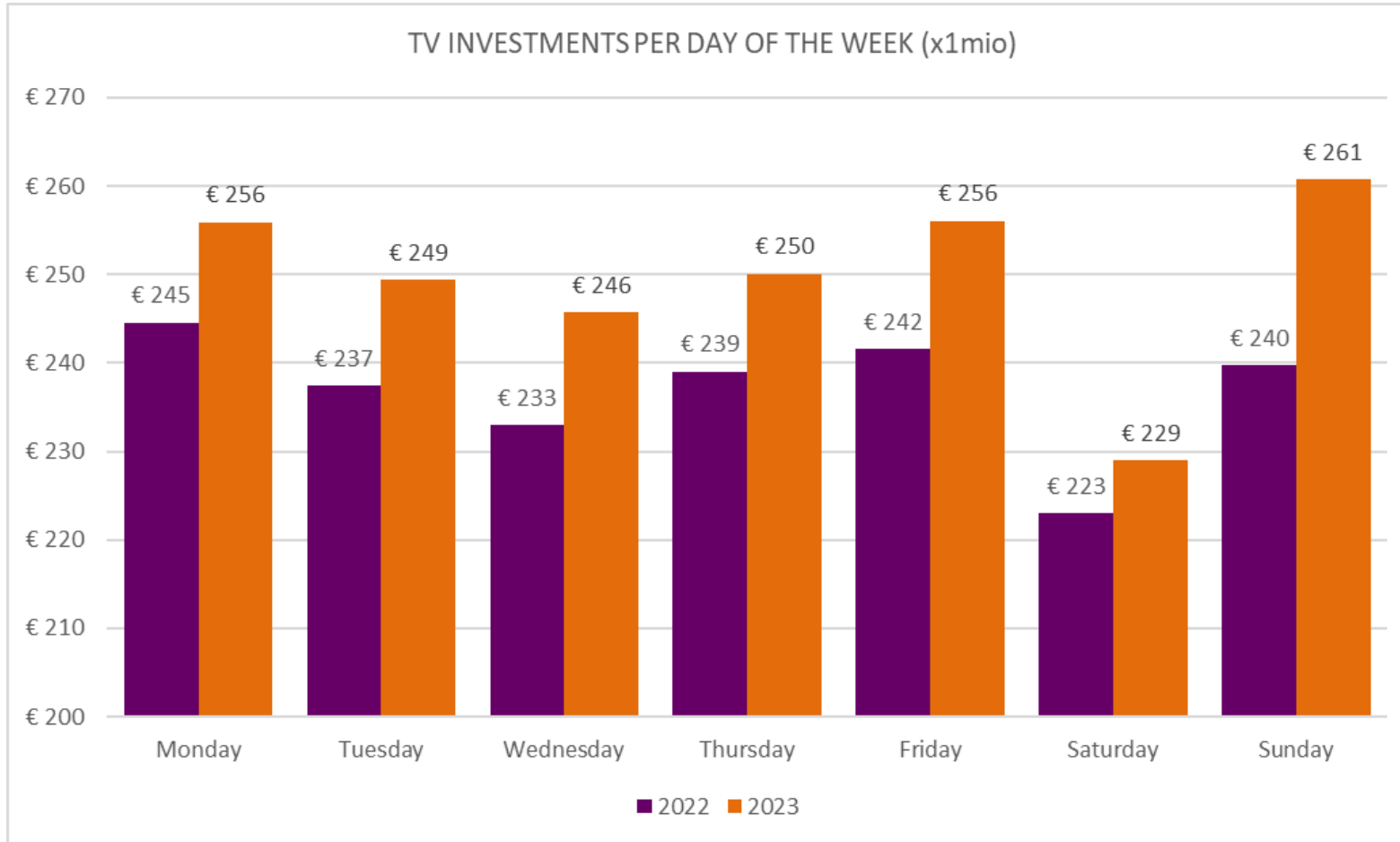




## ► GROSS TV INVESTERINGEN PER WEEK



## ► GROSS TV INVESTERINGEN PER DAY OF THE WEEK





## ► GROSS TV INVESTMENTS PER ECONOMIC GROUP

Economical group (in mio)	2019	2020	2021	2022	2023	index vs 2022	
FOOD	€ 322	€ 272	€ 379	€ 325	€ 339	104	recovery
DISTRIBUTION	€ 186	€ 196	€ 306	€ 297	€ 305	103	
CULTURE, TOERISM, SPORT	€ 184	€ 160	€ 172	€ 191	€ 189	99	
BEAUTY - HYGIENE	€ 196	€ 158	€ 197	€ 175	€ 187	107	recovery
HEALTH - WELLBEING	€ 102	€ 104	€ 118	€ 138	€ 137	99	
TRANSPORT	€ 126	€ 80	€ 107	€ 123	€ 131	107	continuous growth
SERVICES	€ 88	€ 92	€ 115	€ 118	€ 110	94	bad year
CLEANING PRODUCTS	€ 88	€ 99	€ 110	€ 81	€ 105	130	recovery
TELECOM	€ 77	€ 75	€ 82	€ 85	€ 100	118	continuous growth
HOME IMPROVEMENT	€ 62	€ 76	€ 114	€ 103	€ 97	94	
ENERGY - FUEL	€ 19	€ 17	€ 20	€ 17	€ 19	110	
PETS	€ 4	€ 3	€ 8	€ 9	€ 13	143	continuous growth
CLOTHES - ACCESSOIRES	€ 9	€ 8	€ 10	€ 14	€ 13	91	
<b>TOTAL</b>	<b>€ 1,464</b>	<b>€ 1,340</b>	<b>€ 1,739</b>	<b>€ 1,676</b>	<b>€ 1,747</b>	<b>104</b>	

## ► GROSS TV INVESTMENTS – ADVERTISERS TOP 25

	Advertiser (in mio)	2021	2022	2023	index vs 2022	
1	PROCTER & GAMBLE BENELUX	€ 140	€ 107	€ 137	128	recovery
2	FERRERO	€ 35	€ 35	€ 41	117	excellent year
3	UNILEVER BELGIUM FOODS & HPC	€ 52	€ 31	€ 41	131	recovery
4	COCA-COLA SERVICES	€ 52	€ 38	€ 32	85	continuous decline
5	D'IETEREN AUTO	€ 22	€ 26	€ 29	111	continuous growth
6	PROXIMUS	€ 17	€ 22	€ 28	124	continuous growth
7	RECKITT & BENCKISER HOME CARE	€ 31	€ 28	€ 27	95	
8	ORANGE	€ 16	€ 15	€ 26	167	excellent year
9	HENKEL BELGIUM	€ 17	€ 23	€ 24	104	
10	AS WATSON	€ 21	€ 19	€ 23	125	recovery
11	CONTINENTAL FOODS	€ 17	€ 17	€ 22	130	excellent year
12	DELHAIZE	€ 18	€ 19	€ 20	106	continuous growth
13	COLRUYT	€ 22	€ 19	€ 20	104	
14	BEIERSDORF	€ 22	€ 17	€ 19	108	
15	NATIONALE LOTERIJ	€ 17	€ 19	€ 18	95	
16	RECKITT & BENCKISER HEALTHCARE	€ 16	€ 19	€ 18	92	
17	HELLOFRESH	€ 20	€ 16	€ 17	107	
18	BOL.COM	€ 16	€ 17	€ 17	99	
19	MONDELEZ INTERNATIONAL	€ 14	€ 15	€ 16	110	continuous growth
20	RENAULT BELGIQUE LUXEMBOURG	€ 13	€ 15	€ 16	108	continuous growth
21	TELENET OPERATIES	€ 15	€ 16	€ 15	90	
22	COOLBLUE	€ 23	€ 18	€ 15	79	continuous decline
23	VINTED	€ 24	€ 9	€ 12	132	
24	NESTLE BELGILUX	€ 17	€ 10	€ 12	122	
25	PEPSICO BELUX	€ 19	€ 11	€ 9	83	
	<b>TOTAL</b>	<b>€ 675</b>	<b>€ 585</b>	<b>€ 655</b>	<b>112</b>	recovery

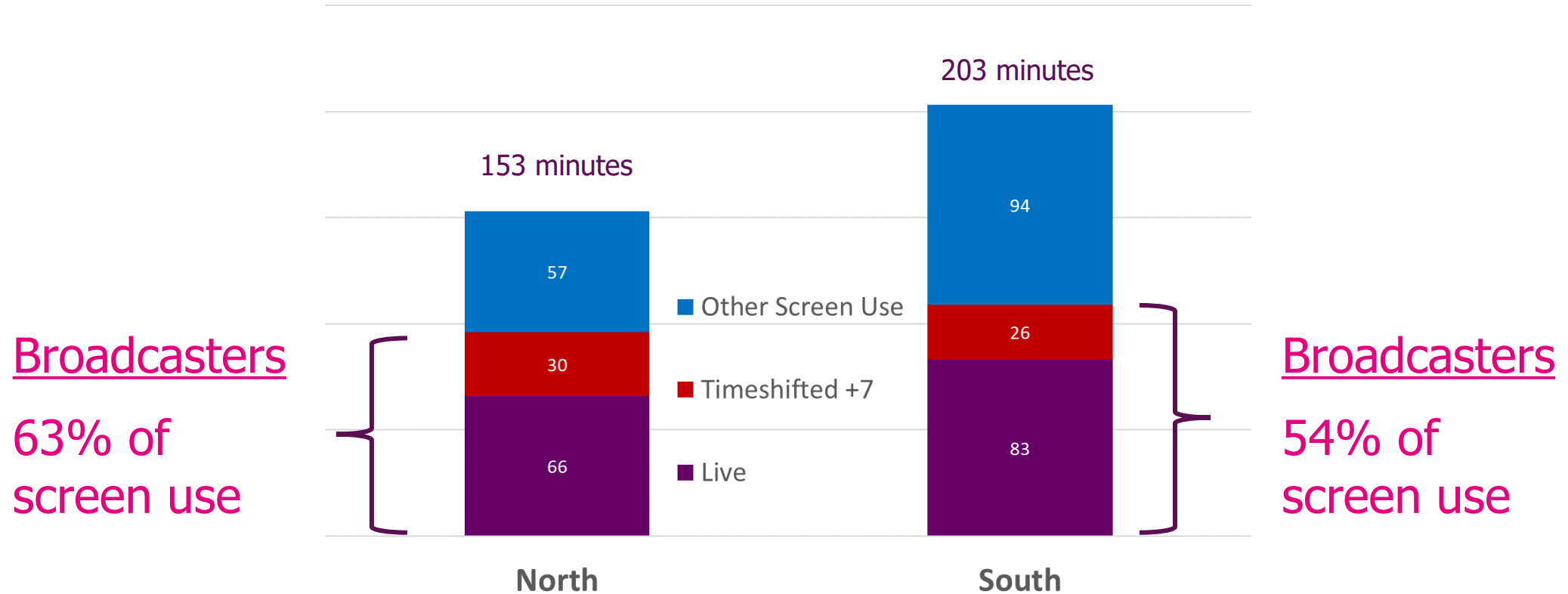
# 3. WATCHING ON THE TV SCREEN





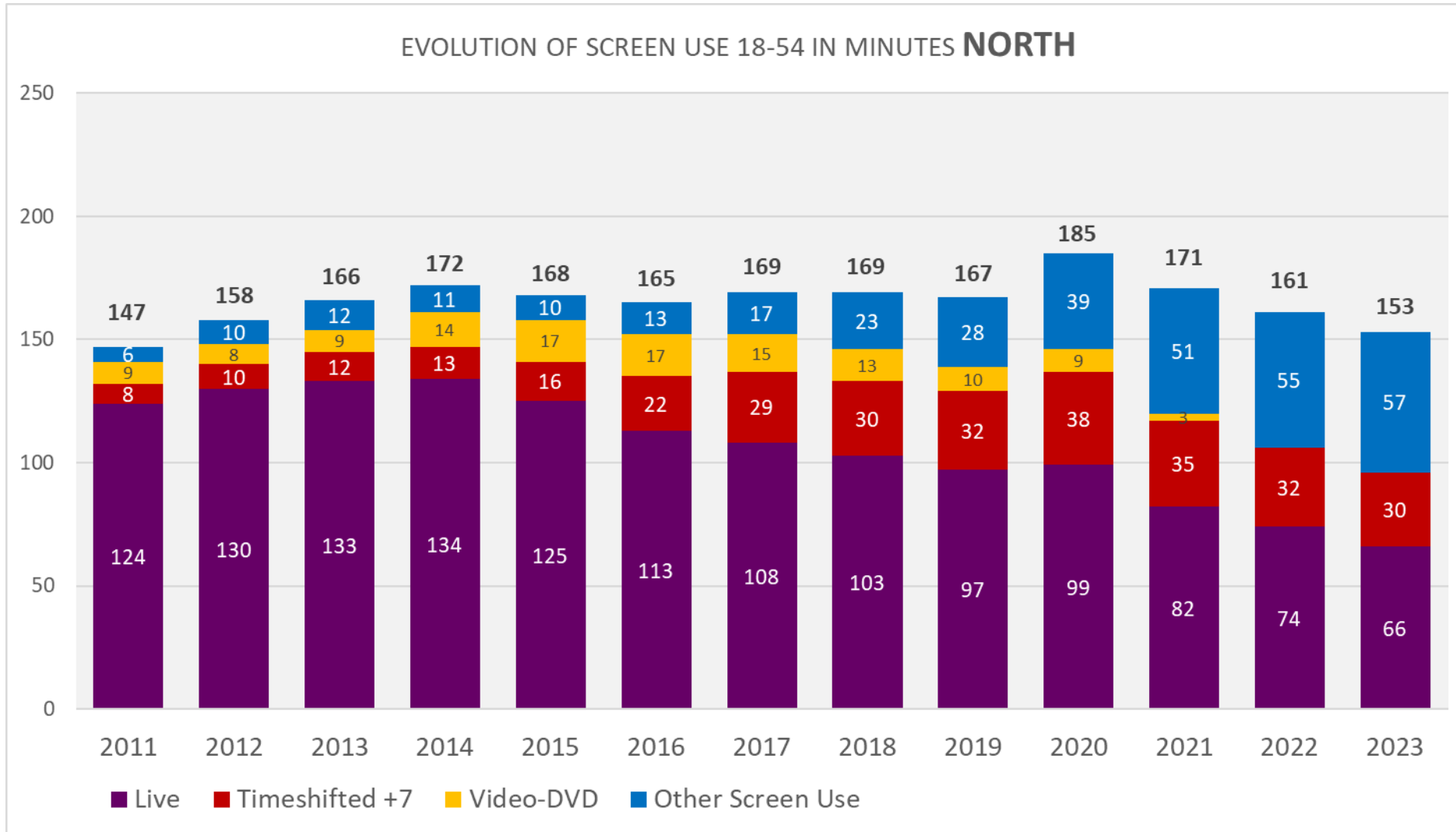
## ▶ TV USE IN THE NORTH VERSUS THE SOUTH IN 2023

### DAILY USE OF THE TV-SCREEN





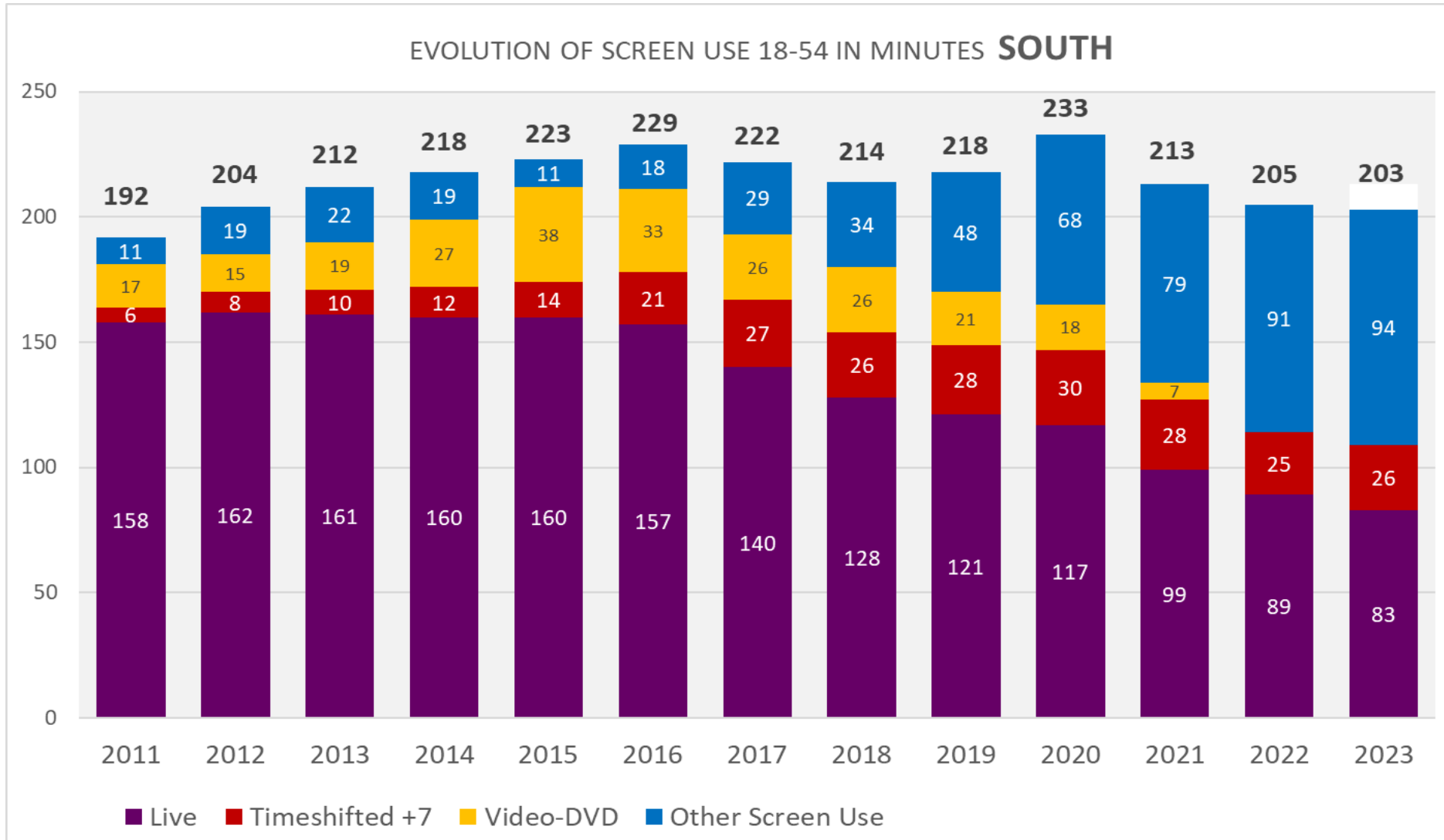
# ► EVOLUTION OF TV SCREEN USE **NORTH**, 18-54



Broadcasters  
63% of screen use



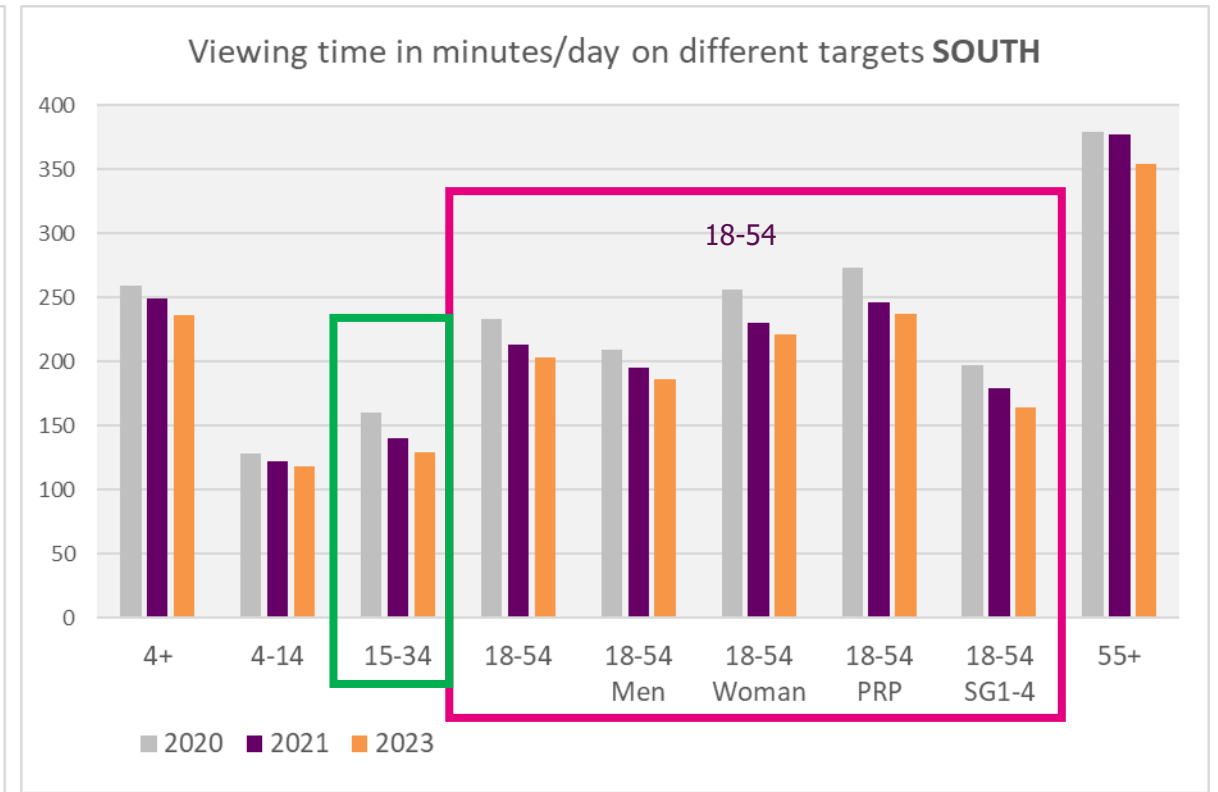
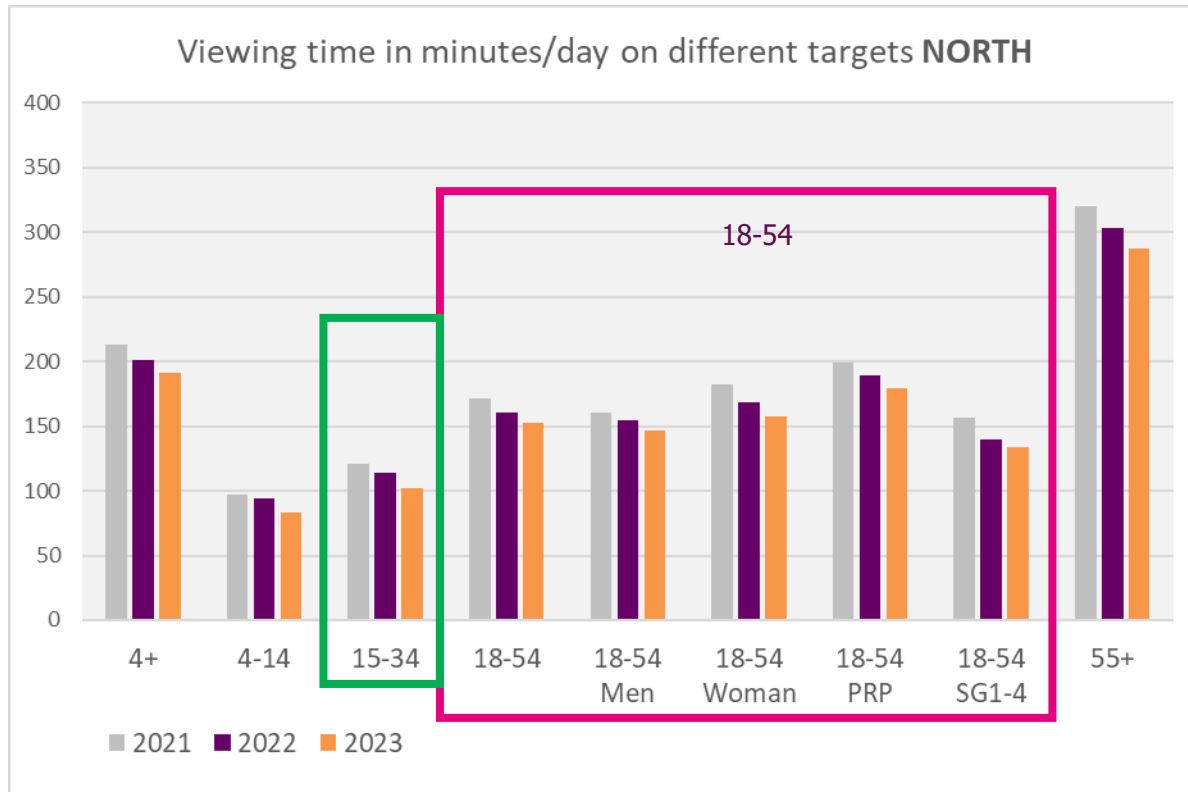
# ▶ EVOLUTION OF TV SCREEN USE **SOUTH**, 18-54



Broadcasters  
54% of screen use

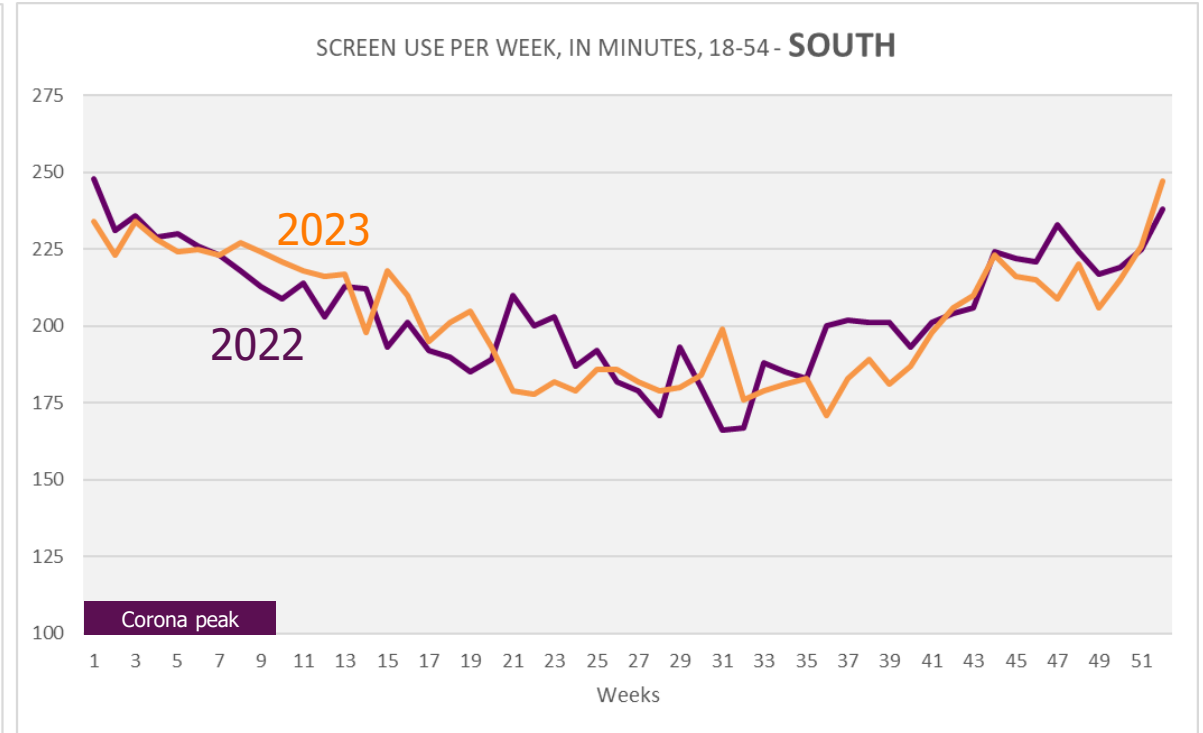
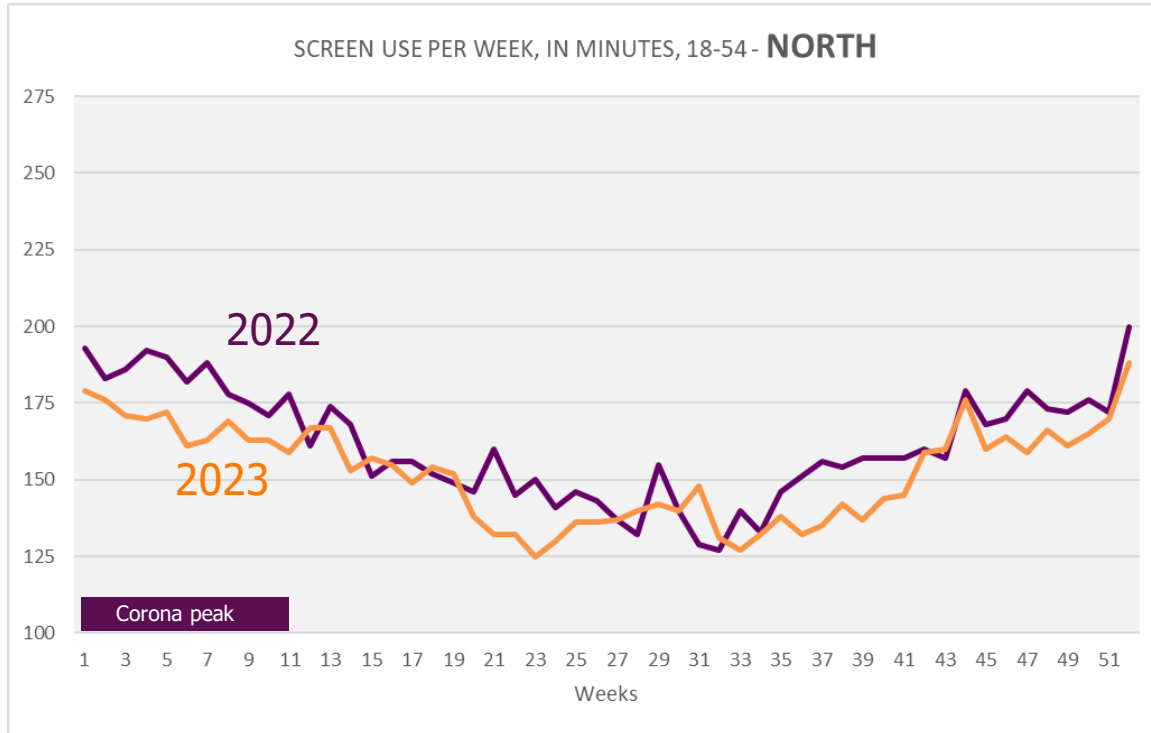
## ▶ TV SCREEN USE PER TARGET

15-34 still watch 102' (North) and 129' (South) minutes per day  
Men more resilient in decrease

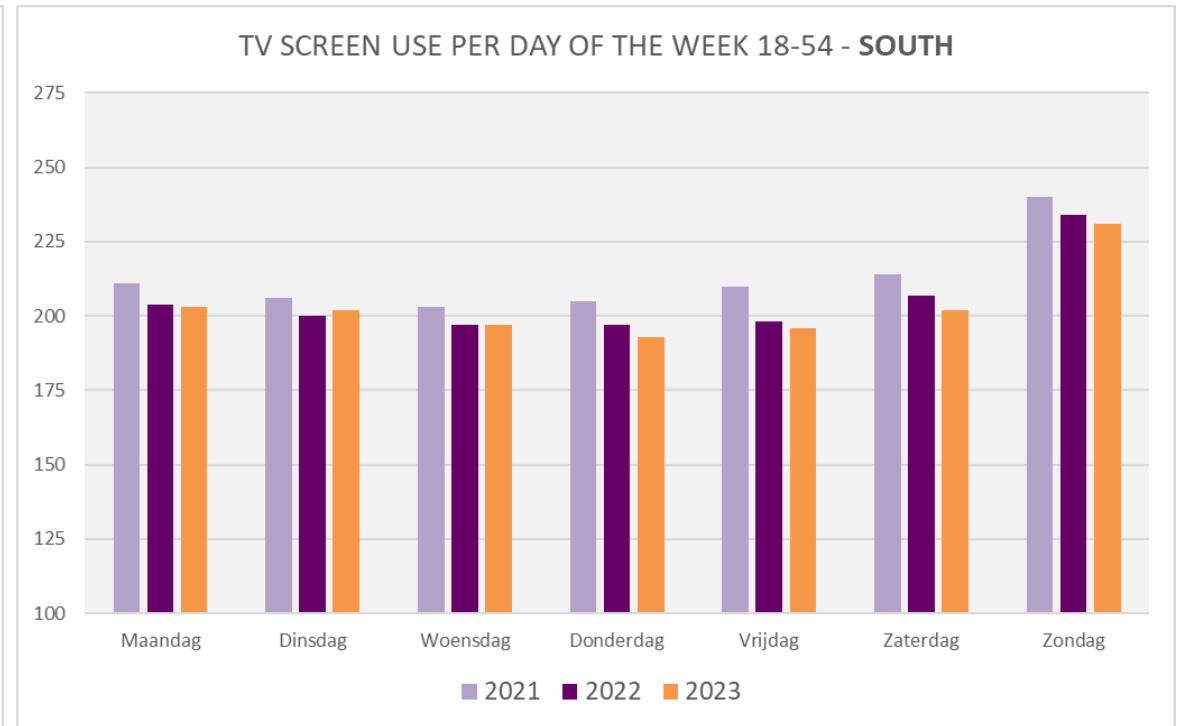
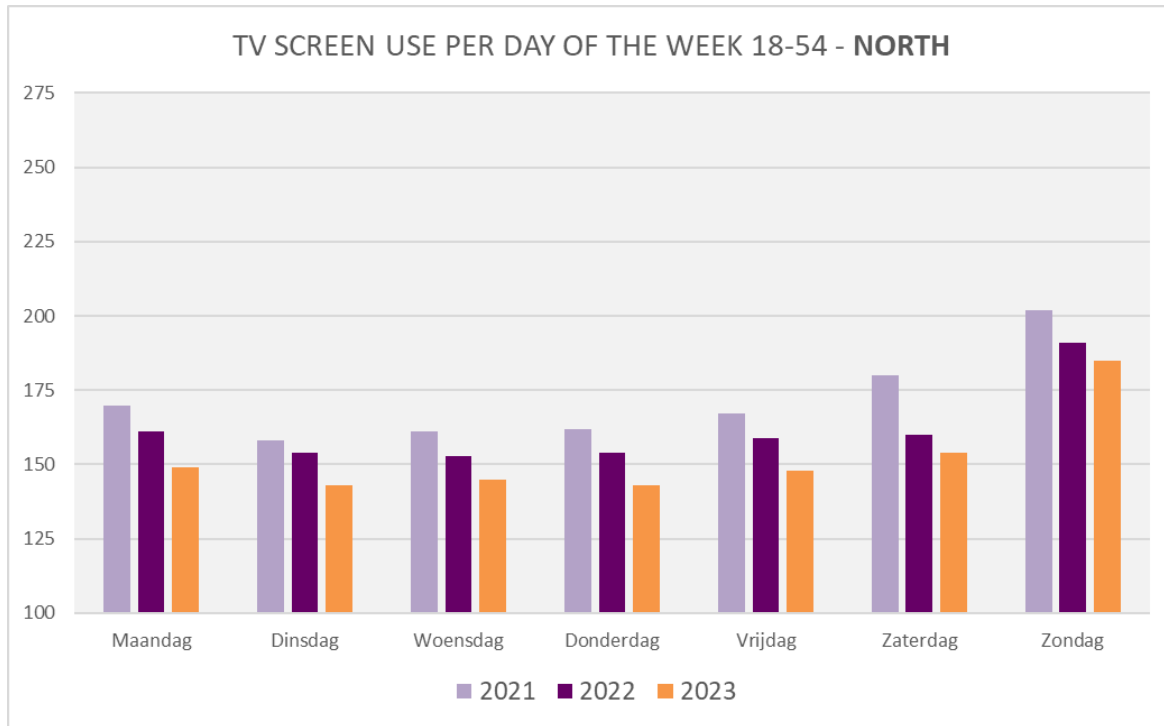




# ► EVOLUTION OF TV SCREEN USE PER WEEK, 18-54

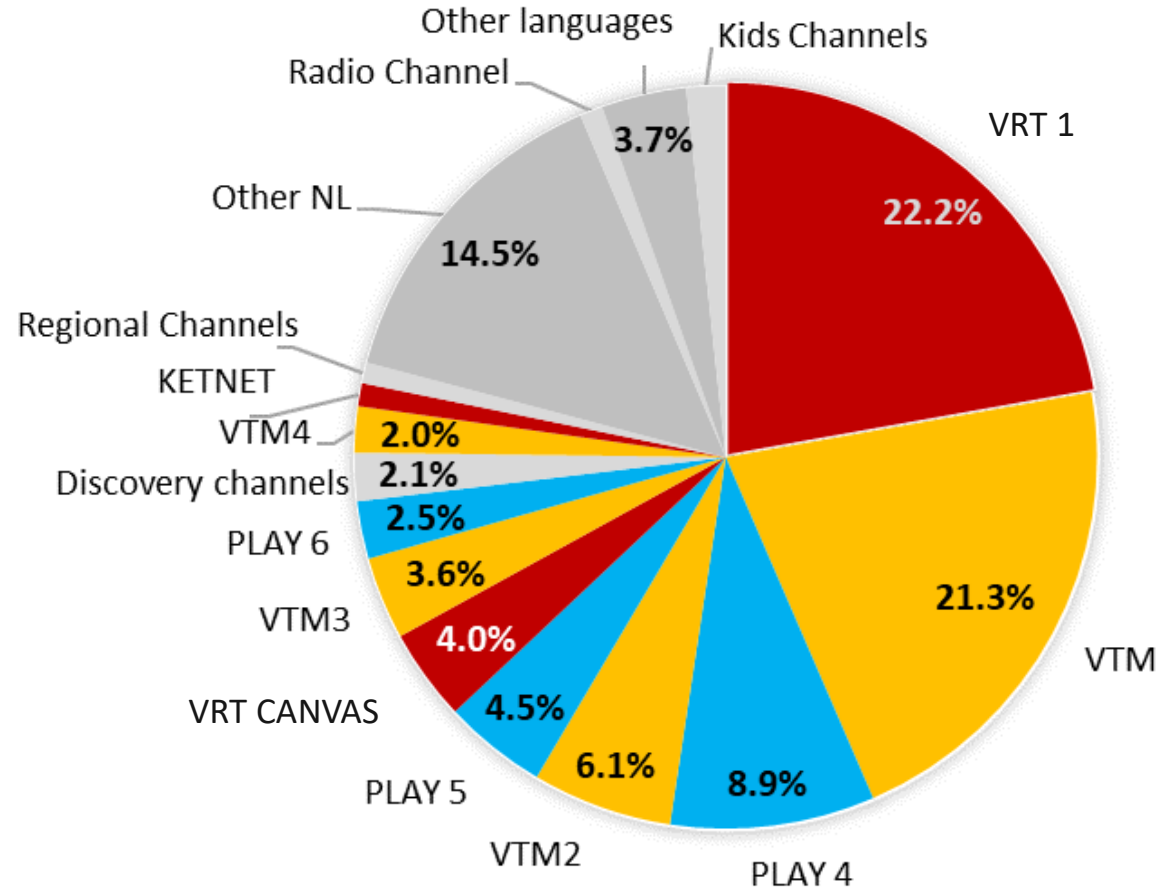


# ► EVOLUTION OF TV SCREEN USE PER DAY-OF-THE-WEEK, 18-54



# ▶ MARKET SHARES 18-54 NORTH

## 2023

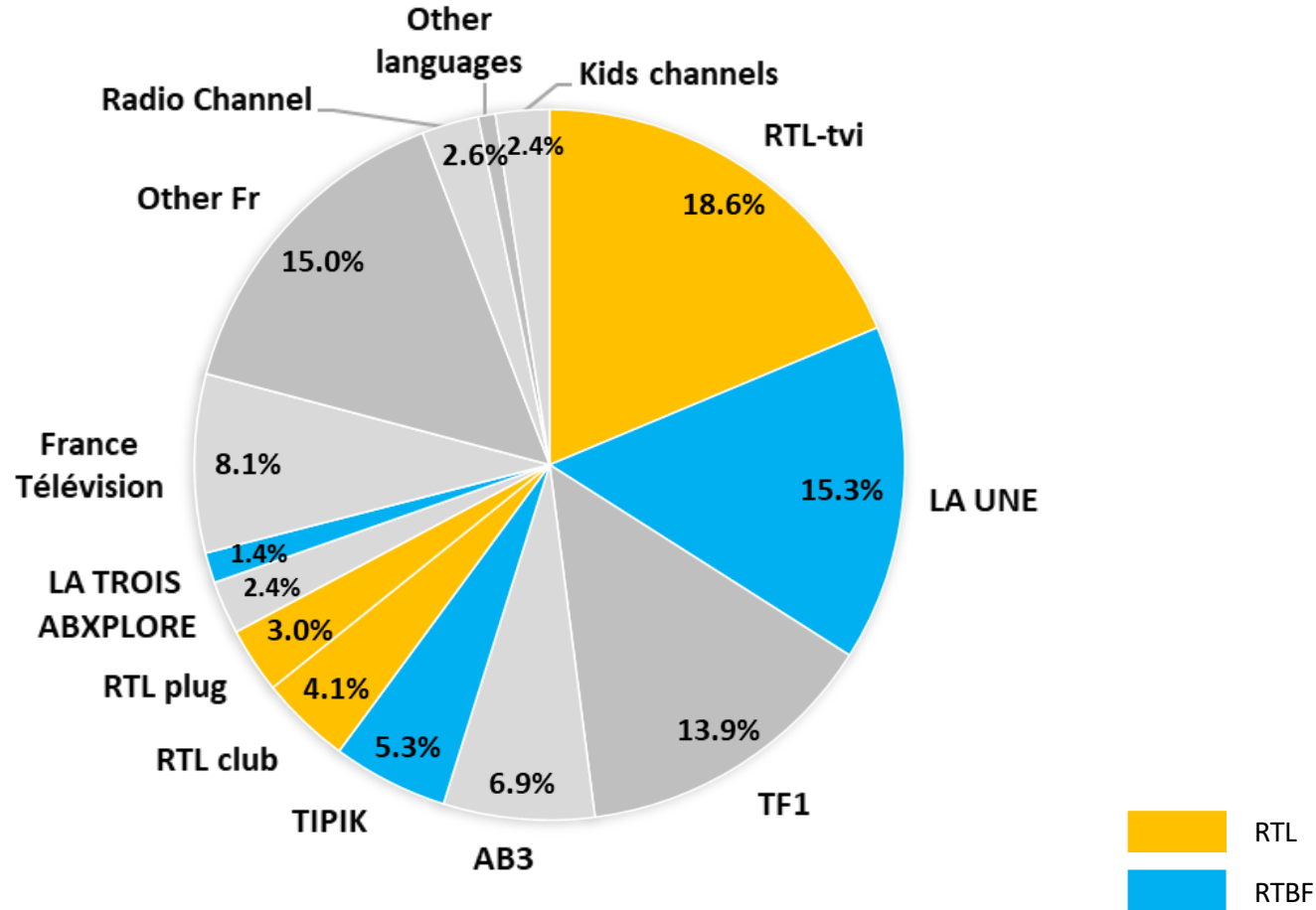


	2023 versus 2022
VRT 1	- 0.1%
VTM	- 0.5%
PLAY 4	+ 0.4%
VTM2	+ 0.0%
PLAY 5	+ 0.8%
VRT CANVAS	- 0.6%
VTM3	+ 0.2%
PLAY 6	+ 0.1%
Discovery channels	- 0.6%
VTM4	- 0.1%
KETNET	- 0.2%
Other NL	+ 1.6%
Other languages	+ 0.2%
Radio Channel	+ 0.0%
Regional Channels	- 0.1%
Kids Channels	- 0.7%



# ▶ MARKET SHARES 18-54 SOUTH

## 2023



	2023 versus 2022
RTL-tvi	- 1.4%
LA UNE	+ 1.8%
TF1	+ 0.2%
AB3	+ 0.3%
TIPIK	- 1.1%
RTL club	+ 0.3%
RTL plug	+ 0.2%
ABXPLORE	- 0.0%
LA TROIS	+ 0.1%
France Télévision	+ 0.2%
Other Fr	+ 0.3%
Radio Channel	- 0.9%
Other languages	- 0.1%
Kids channels	- 0.2%

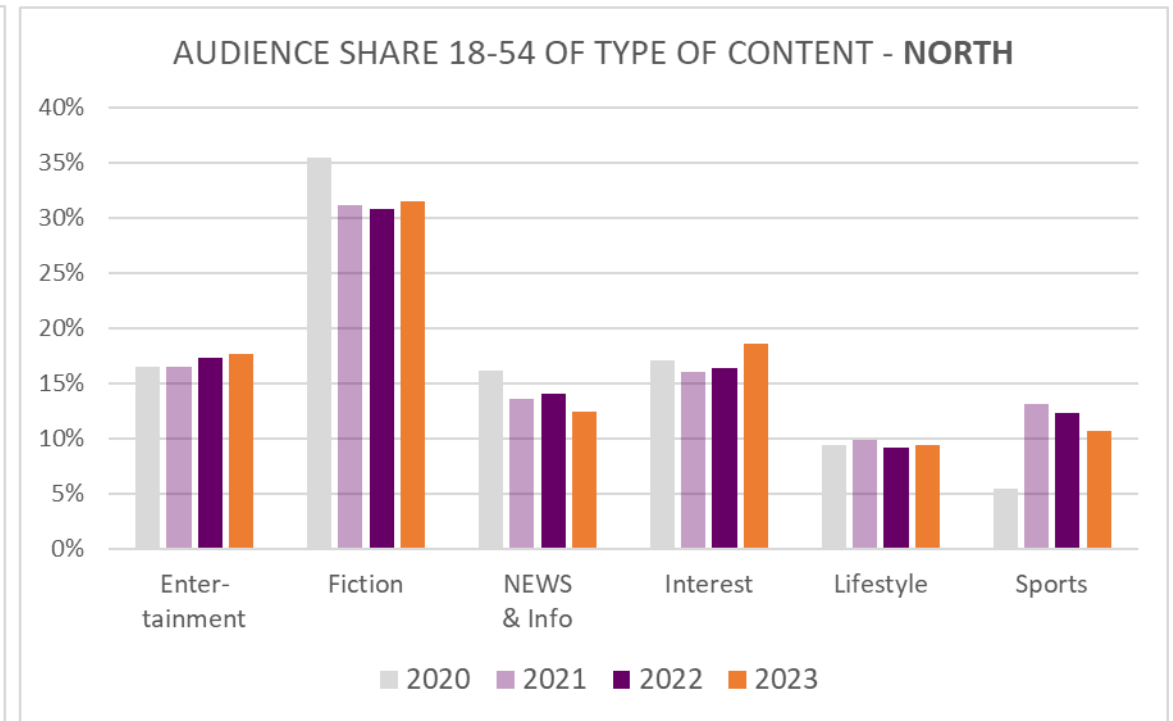
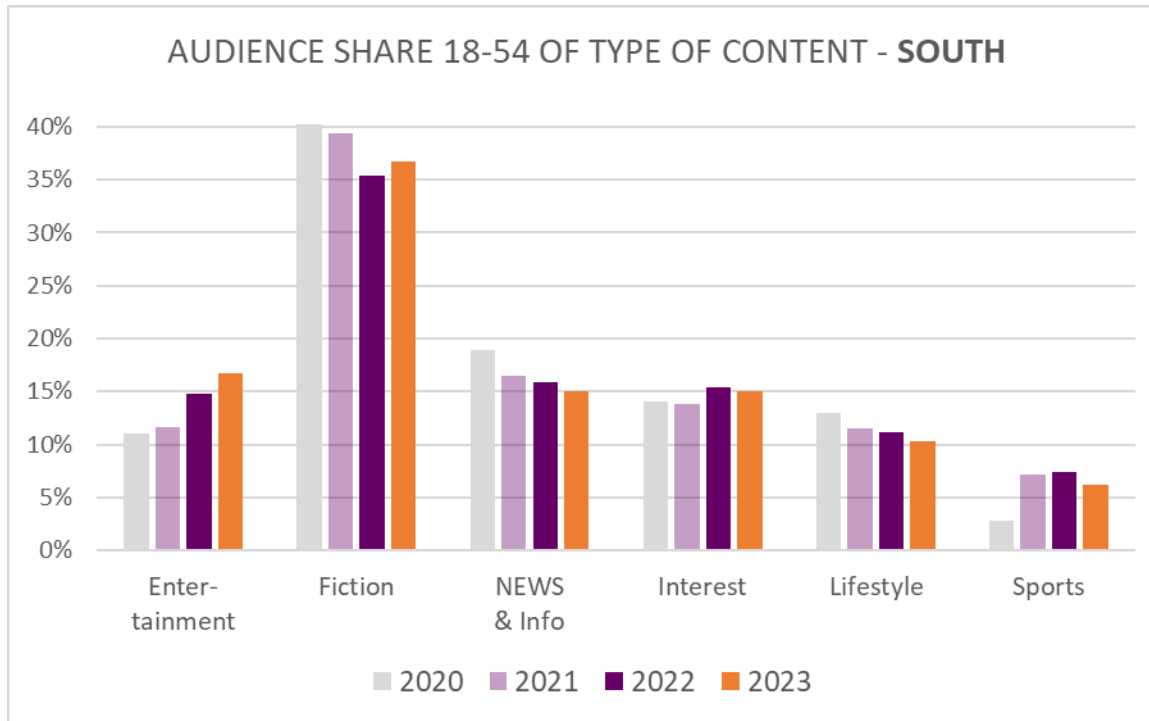
Source : CIM TV – 18-54 – Live+7



## 4. BROADCASTERS CONTENT (on the TV screen)

► SHARE OF TV CONTENT TYPE ON 18-54

South : more fiction, and entertainment on the rise  
 North : more sports, but 2023 was not a sports year





## ► SHARE OF TYPE OF TV CONTENT, 18-54

SOUTH						NORTH				
	2020	2021	2022	2023			2020	2021	2022	2023
Entertainment Game shows	5%	5%	6%	7%	Entertainment	Entertainment Game shows	6%	6%	6%	7%
Entertainment other	2%	2%	2%	3%		Entertainment other	3%	4%	5%	5%
Entertainment Music	4%	5%	6%	7%		Entertainment Music	8%	6%	6%	6%
Fiction drama	7%	7%	6%	6%	Fiction	Fiction drama	8%	6%	6%	5%
Fiction action/adventure	11%	11%	10%	11%		Fiction action/adventure	8%	6%	6%	6%
Fiction comedy	9%	8%	7%	7%		Fiction comedy	7%	7%	6%	5%
Fiction other	3%	3%	3%	2%		Fiction other	2%	2%	2%	3%
Fiction Police/Detective	9%	8%	8%	9%		Fiction Police/Detective	6%	5%	6%	7%
Fiction Soap	0%	2%	1%	2%	Fiction Soap	4%	4%	5%	5%	
General news+specials	16%	13%	13%	12%	News & Info	General news+specials	12%	10%	11%	10%
Information	3%	3%	3%	3%		Information	4%	3%	3%	2%
Interest Human/society	9%	10%	11%	11%	Interest	Interest Human/society	13%	12%	13%	15%
Interest other	5%	4%	5%	4%		Interest other	4%	4%	3%	4%
Lifestyle cooking	4%	3%	3%	2%	Lifestyle	Lifestyle cooking	4%	3%	3%	3%
Lifestyle decoration	2%	2%	2%	2%		Lifestyle decoration	1%	2%	2%	2%
Lifestyle other	7%	6%	7%	6%		Lifestyle other	5%	5%	5%	5%
Sports cycling	0%	1%	1%	1%	Sports	Sports cycling	2%	3%	4%	4%
Sports Football	1%	5%	5%	3%		Sports Football	2%	6%	5%	3%
Sports other	1%	2%	2%	2%		Sports other	1%	4%	3%	3%
TOTAL	100%	100%	100%	100%		TOTAL	100%	100%	100%	100%

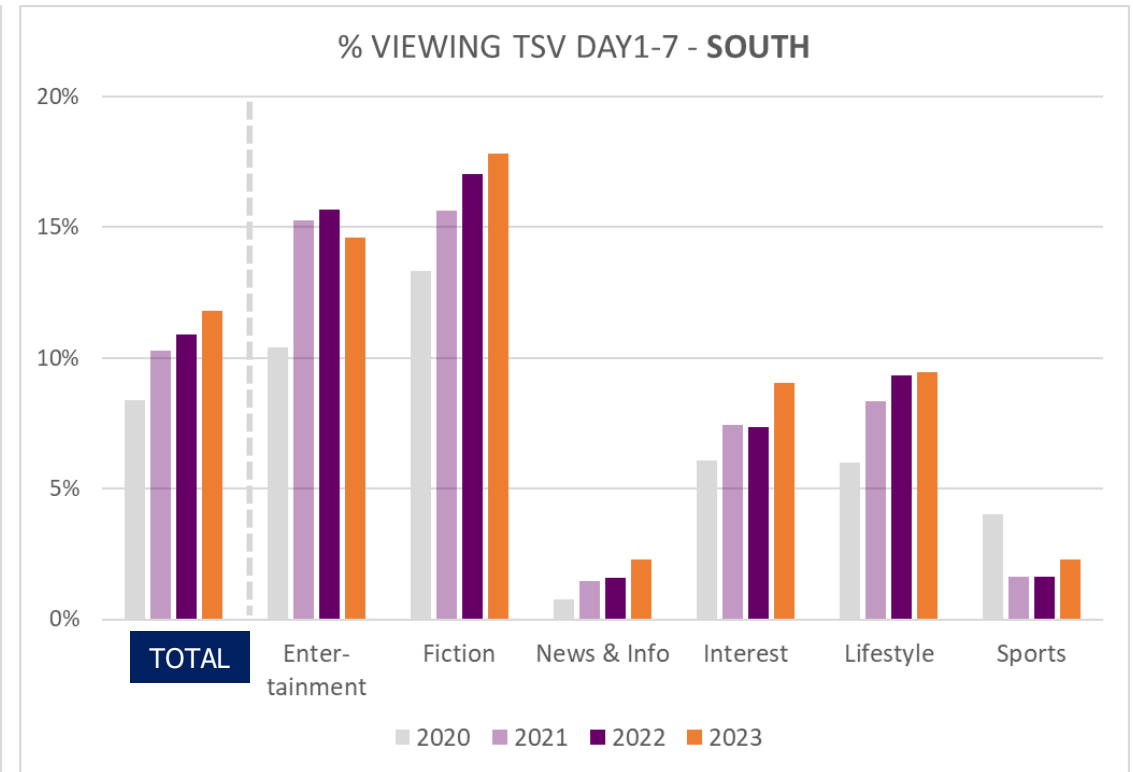
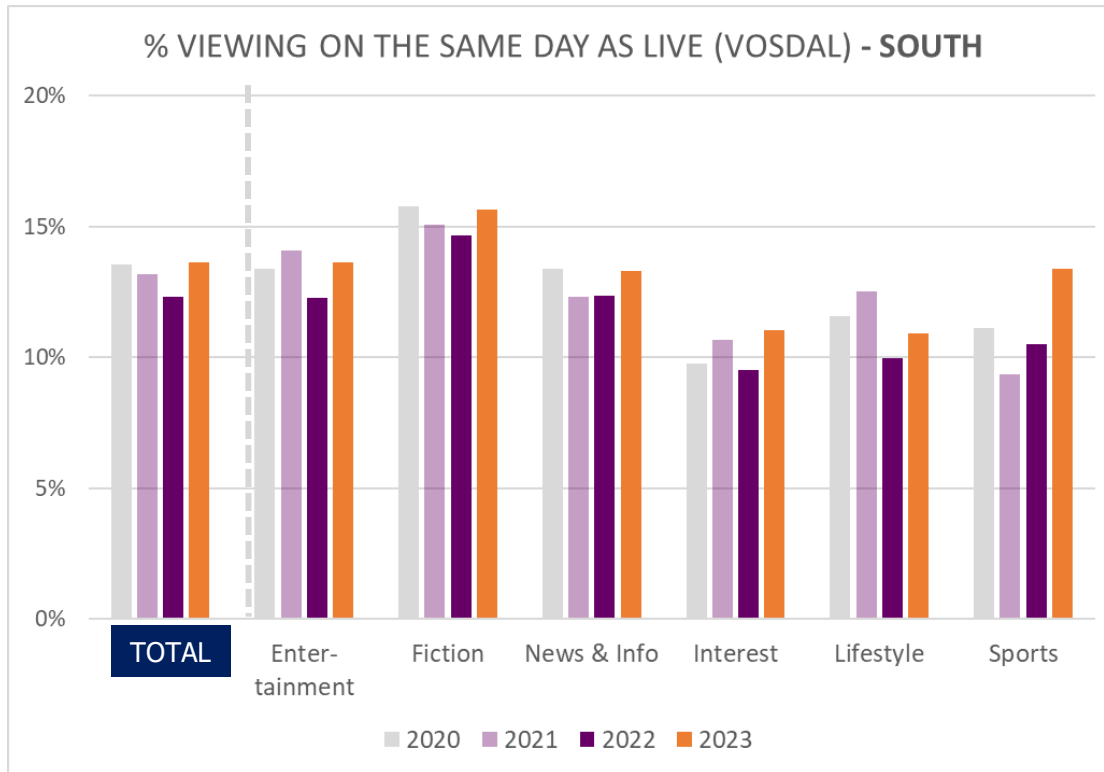


# ▶ TIME SHIFTED VIEWING 18-54 SOUTH = 24% of viewing in 2023

## TSV same day (54 % of TSV)

## TSV day +1-7 (46 % of TSV)

	2020	2021	2022	2023
VOSDAL	62%	56%	53%	54%
TSV 1-7	38%	44%	47%	46%



TSV the same day is time management

TSV the following days is non-linear viewing

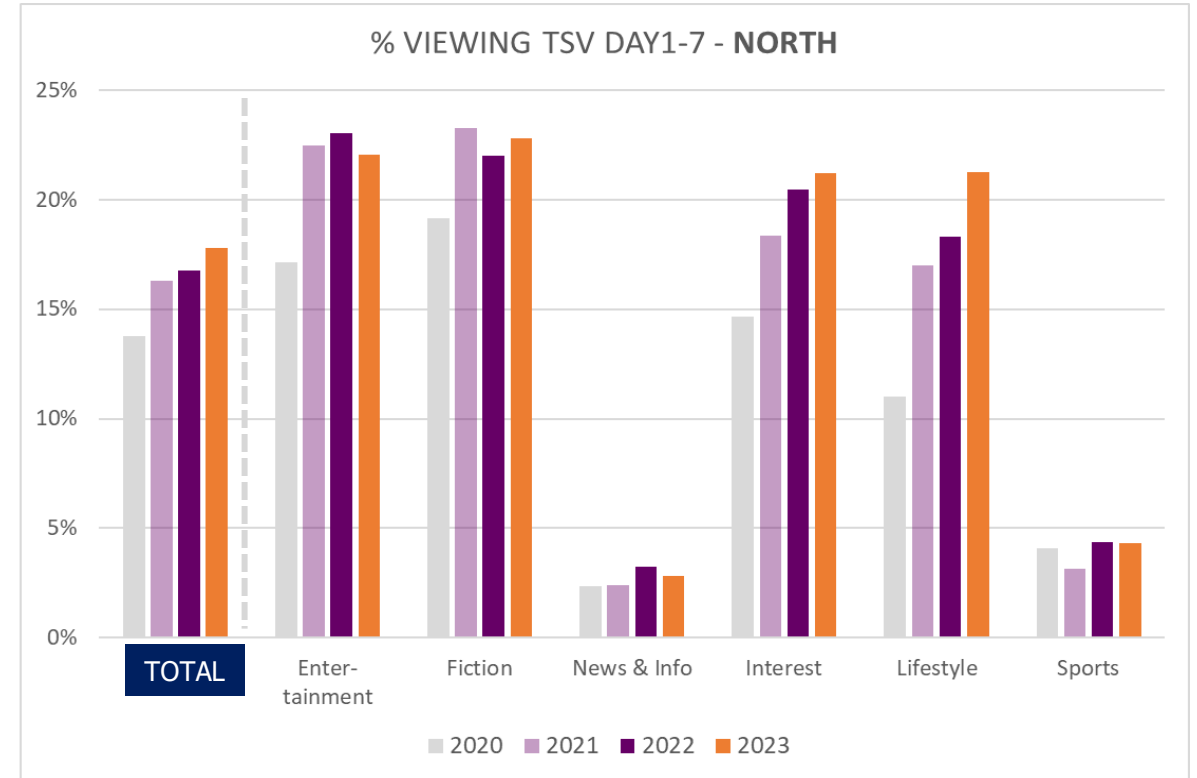
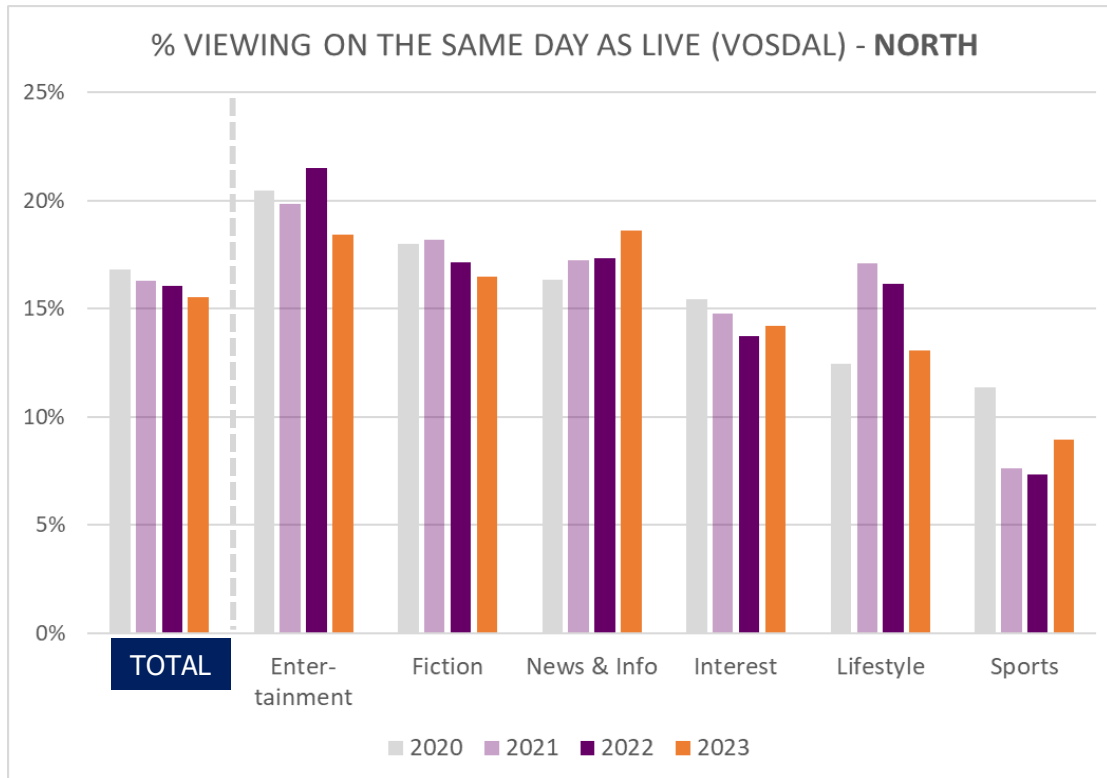


# ▶ TIME SHIFTED VIEWING 18-54 NORTH = is 31% of viewing in 2023

## TSV same day (47 % of TSV)

	2020	2021	2022	2023
VOSDAL	55%	50%	49%	47%
TSV 1-7	45%	50%	51%	53%

## TSV day +1-7 (53 % of TSV)



TSV the same day is time management

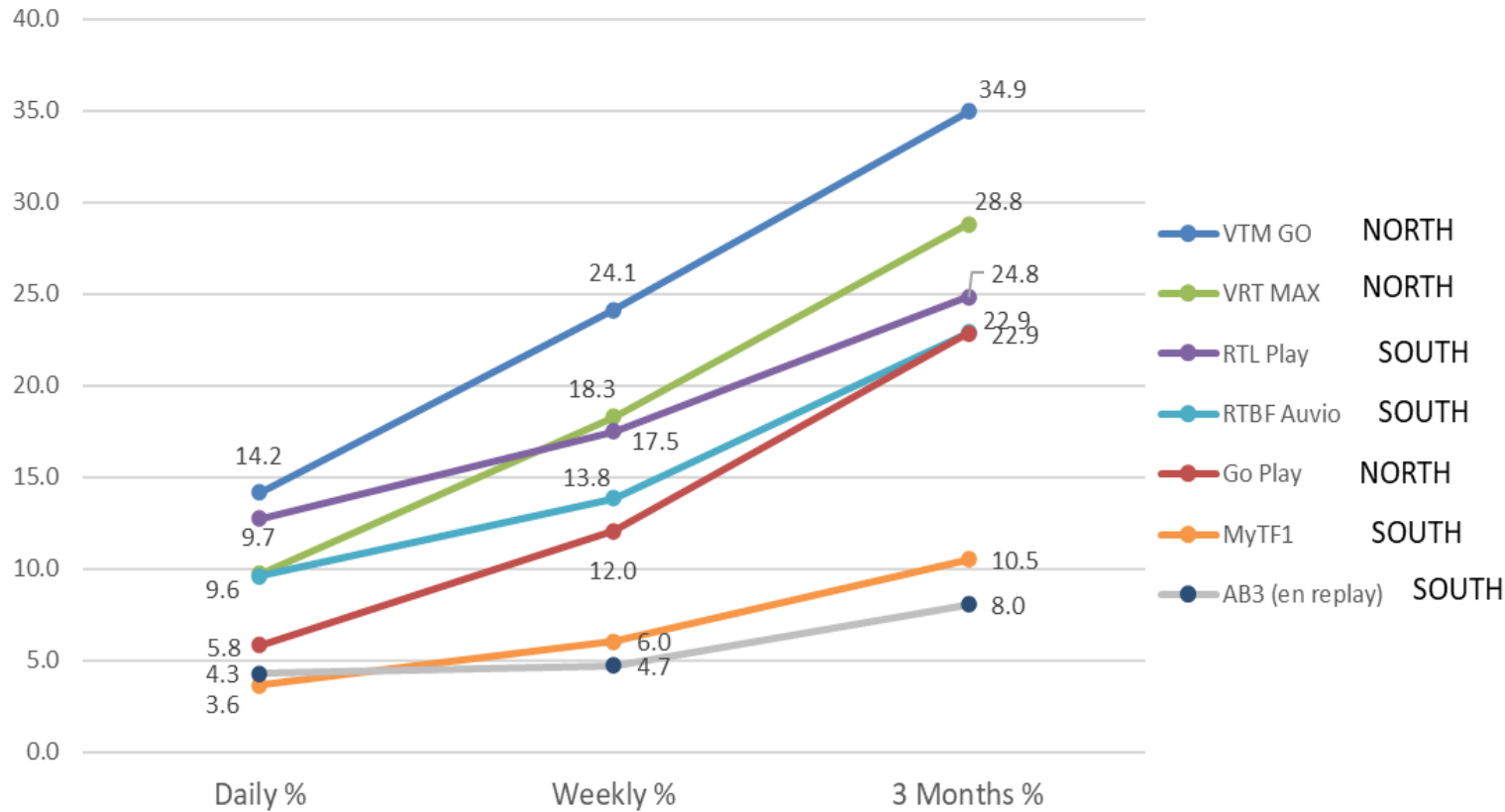
TSV the following days is non-linear viewing

# 5. BROADCASTERS CONTENT ONLINE

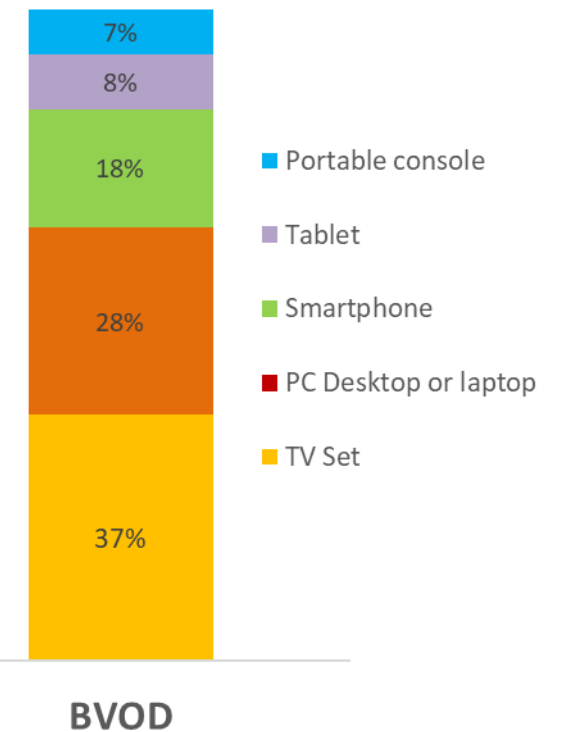


# REACH OF BVOD PLATFORMS on 18-54y in 2023

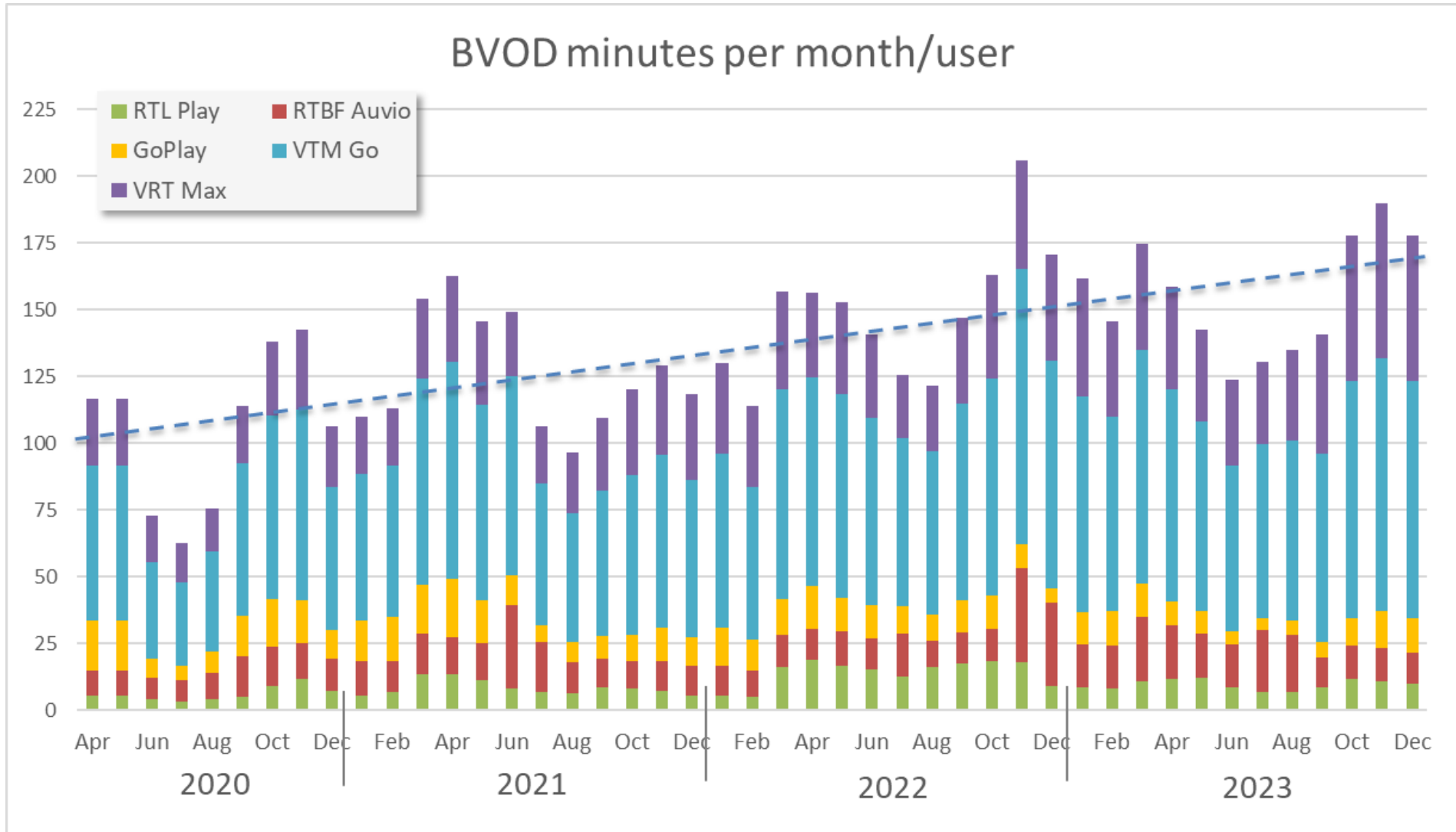
### Reach % in the region on 18-54y BVOD PLATFORMS



### Devices used by 18-54 National



# ► VOLUME EVOLUTION OF THE BELGIAN BVOD PLATFORMS



+ 16 %/year

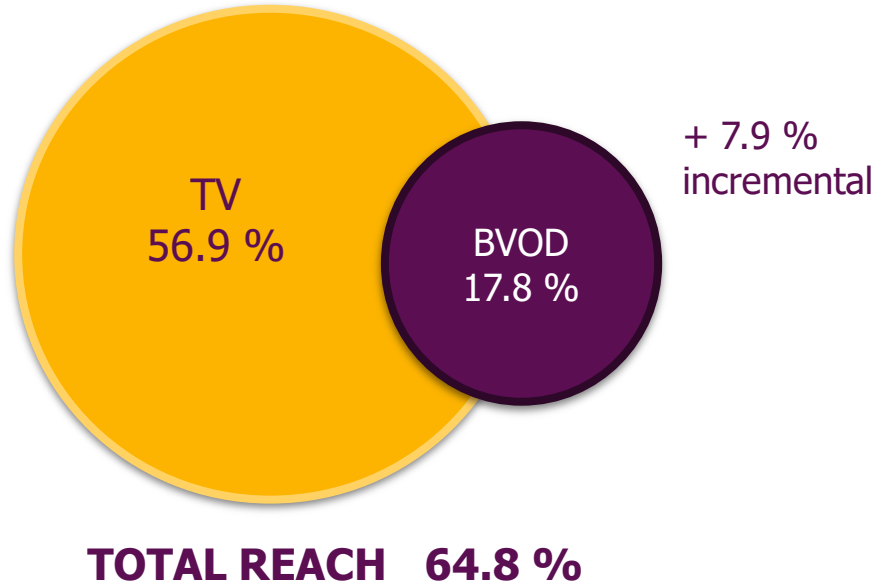
Source : CIM Internet – 18-54 – Domestic only – Video only



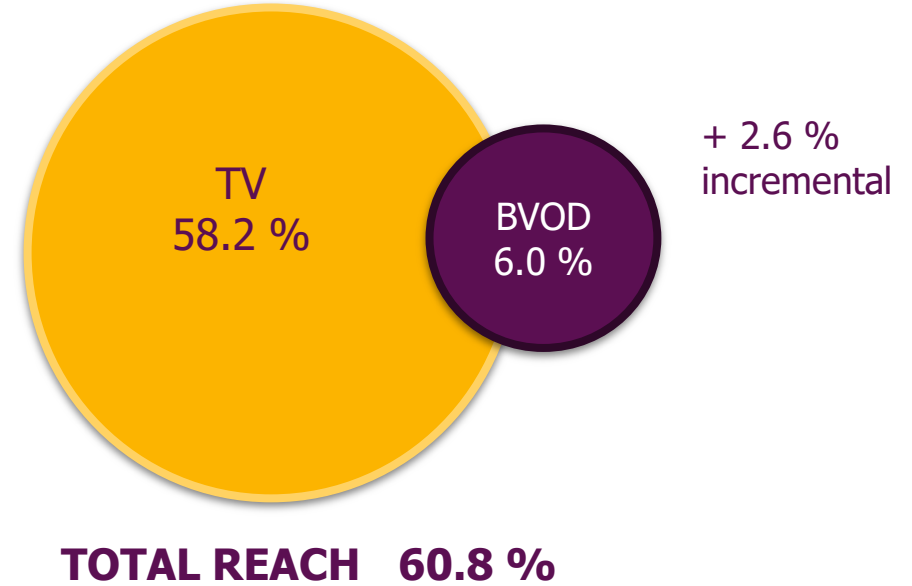


# ▶ BVOD CREATES EXTRA REACH FOR TV ADVERTISING

NORTH

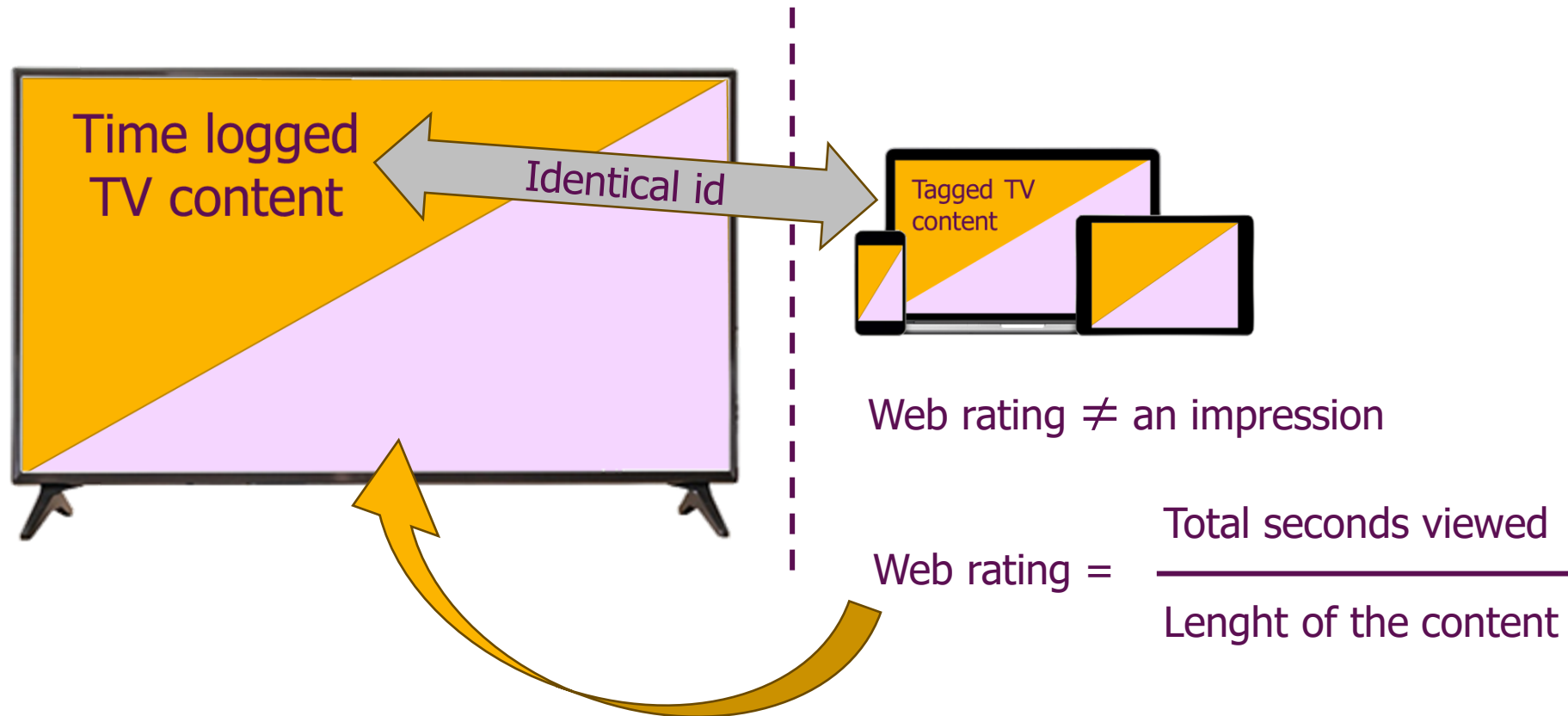


SOUTH



## ► IDENTIFYING BROADCASTERS CONTENT ON OTHER SCREENS

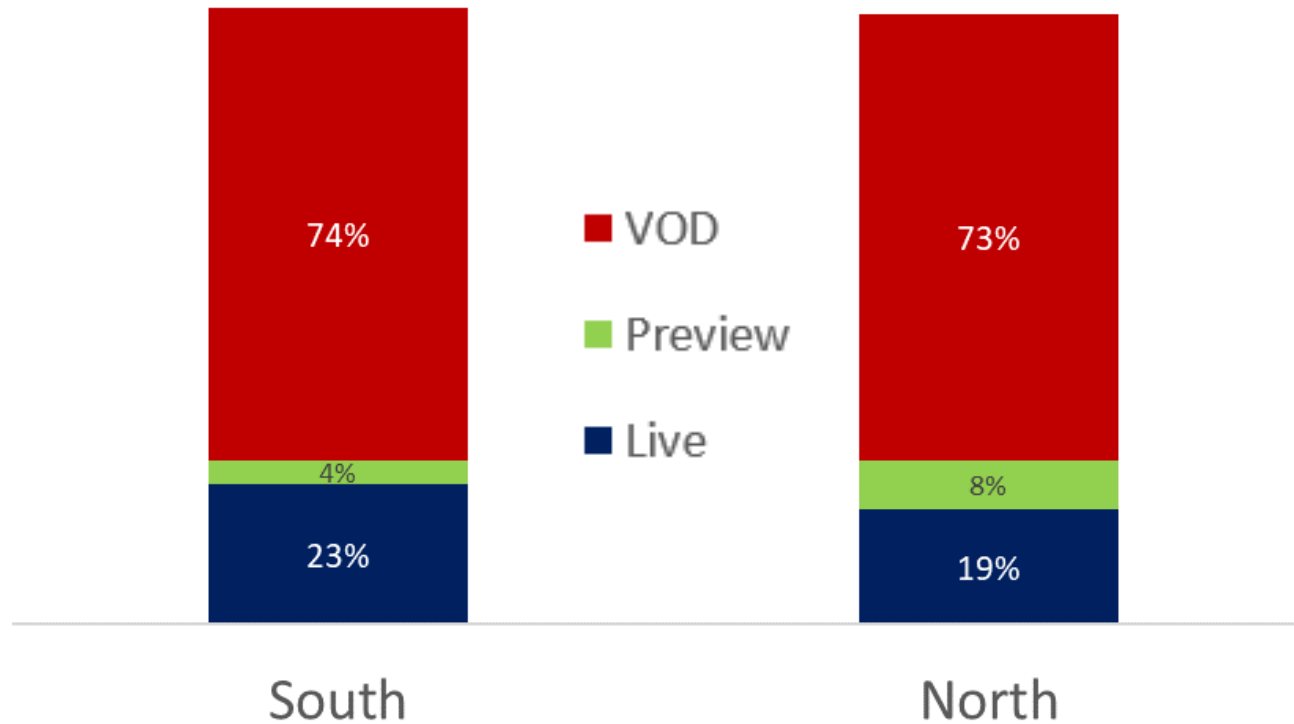
For broadcasters content that is available online and that has an identical identifier a webrating is calculated (on 4+)





## ▶ ONLINE VIEWING OF BROADCASTERS CONTENT

Tagged content that is live, or has been aired (up to 28 days prior) or that will be aired (BVOD platforms)



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

## ▶ TOP 25 ONLINE VIEWING OF BROADCASTERS CONTENT 2023 (4+)

NORTH		Programme	Channel	Aired	Average in 000
1	KNOKKE OFF	Welcome to Knokke, bitch	VRT 1	03/08	454 284
2	GODVERGETEN	Zwijgen is goud	VRT CANVAS	05/09	198 812
3	HET VERHAAL VAN VLAANDEREN	De Prehistorie	VRT 1	01/01	138 580
4	DE TWAALF	Anton en Julie	VRT 1	03/09	136 805
5	DE MOL	aflevering 1 - 1/3	PLAY VIER	19/03	126 377
6	SPECIAL FORCES, WIE DURFT WINT	Aflevering 1 - 1/3	VTM	01/05	119 648
7	1985	Papa	VRT 1	12/03	118 239
8	DOWN THE ROAD	Down the road	VRT 1	29/10	108 152
9	BLIND GETROUWD	Blind Getrouwd	VTM	13/11	107 711
10	DE VERHULSTJES	S5 1 - 1/3	PLAY VIER	05/11	107 040
11	ARCADIA	De patient	VRT 1	16/04	104 392
12	DE SLIMSTE MENS TER WERELD	NAJAAR 2023 1 - 1/3	PLAY VIER	16/10	100 554
13	EXPEDITIE GOORIS	Aflevering 1 - 1/3	VTM2	10/01	97 243
14	DE VERRADERS	Aflevering 1 - 1/3	VTM	17/09	91 900
15	DERTIGERS	Dertigers	VRT 1	10/04	87 293
16	THE MASKED SINGER	Aflevering 1 - 1/4	VTM	03/02	84 871
17	FAMILIE	Familie - 1/2	VTM	06/01	83 042
18	DE CLUB	waar je niet bij wil horen	VRT 1	06/09	80 308
19	DAG & NACHT	Augustus	VRT 1	14/10	78 759
20	LIEFDE VOOR MUZIEK	Songs van K3 - 1/3	VTM	04/04	76 257
21	HUIS GEMAAKT	Aflevering 14 - 1/3	VTM	14/12	75 183
22	DE VERMEIRES	Aflevering 1 - 1/3	VTM	18/02	70 278
23	ROUGH DIAMONDS	Rough diamonds	VRT 1	29/10	70 058
24	CAMPING COPPENS	Home Sweden Home - 1/3	VTM	19/09	66 029
25	BESTEMMING X	Aflevering 1 - 1/3	VTM	20/02	65 404

SOUTH		Programme	Channel	Aired	Average in 000
1	LES CINQUANTE		RTL PLUG	04/09	33 999
2	FOOT. AMICAL	Allemagne - Belgique	LA UNE	28/03	32 602
3	1985	Vvers le futur	LA UNE	22/01	30 743
4	ATTRACTION	Le sacrifice	LA UNE	16/04	27 632
5	ICI TOUT COMMENCE	Episode 668	TIPIK	19/05	27 311
6	F1. CHAMP.M. GP. ARABIE	SAOUDITE	TIPIK	19/03	26 895
7	LES APPRENTIS AVENTURIERS	Episode 1	RTL PLUG	13/02	26 506
8	F1. CHAMP.M. GP. AUSTRALIE		TIPIK	02/04	25 801
9	F1. CHAMP.M. GP. MIAMI		TIPIK	07/05	25 493
10	FOOT. CHAMP.E. QUALIF	Suède - Belgique	LA UNE	24/03	24 562
11	C'EST LA FAMILLE	Bienvenue	RTL PLUG	03/07	24 479
12	F1. CHAMP.M. GP. ETATS-UNIS		TIPIK	22/10	24 418
13	LE CROSS	Emission 44	RTL PLUG	11/01	24 351
14	F1. CHAMP.M. GP. SINGAPOUR		TIPIK	17/09	23 740
15	F1. CHAMP.M. GP. BAHREIN		TIPIK	05/03	23 518
16	F1. CHAMP.M. GP. GRANDE- BRETAGNE		TIPIK	09/07	23 487
17	F1. CHAMP.M. GP. MEXIQUE		TIPIK	29/10	22 724
18	DEMAIN NOUS APPARTIENT	Episode 1481	LA UNE	28/07	22 352
19	F1. CHAMP.M. GP. HONGRIE		TIPIK	23/07	22 323
20	F1. CHAMP.M. GP. BRESIL		TIPIK	05/11	22 067
21	F1. CHAMP.M. GP. AZERBAIDJAN		TIPIK	30/04	21 961
22	F1. CHAMP.M. GP. AUTRICHE		TIPIK	02/07	21 441
23	F1. CHAMP.M. GP. PAYS-BAS		TIPIK	27/08	21 182
24	F1. CHAMP.M. GP. JAPON		TIPIK	24/09	21 173
25	FOOT. CHAMP.E. QUALIF	Belgique - Suède	LA UNE	16/10	21 107

## ▶ TOP 25 TV PROGRAMMES – TOTAL VIDEO VIEW (ON 4+)

Viewed on TV and(or) online on other screens

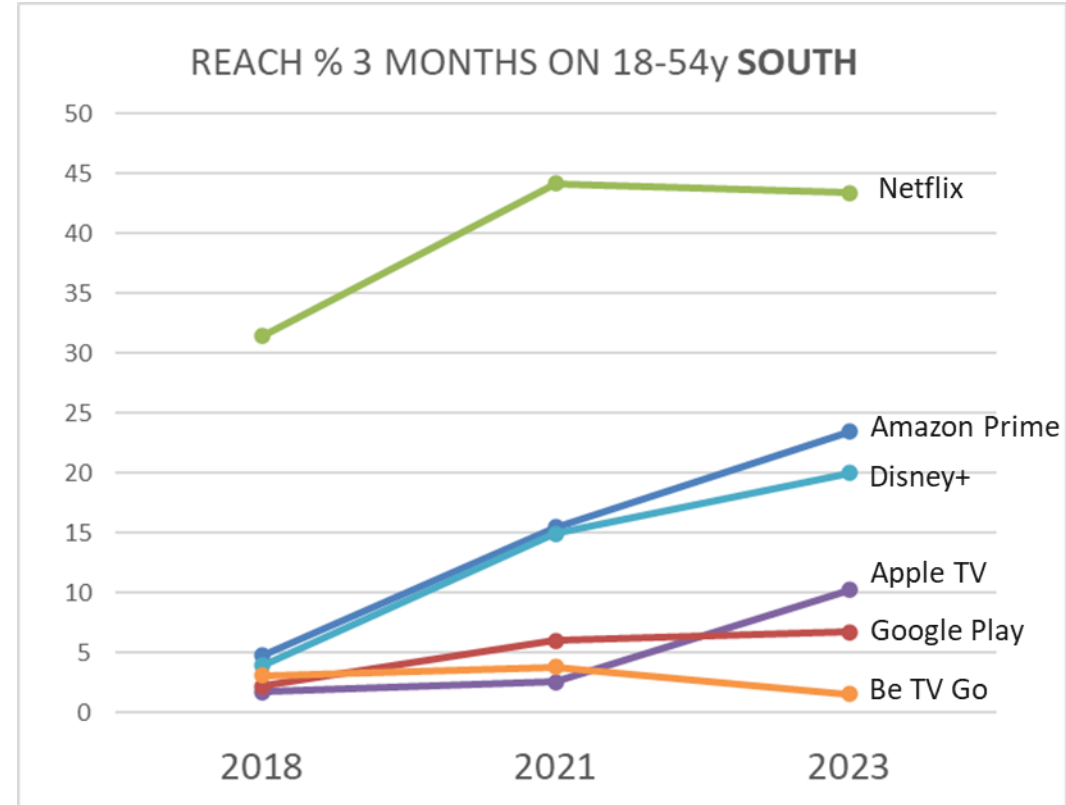
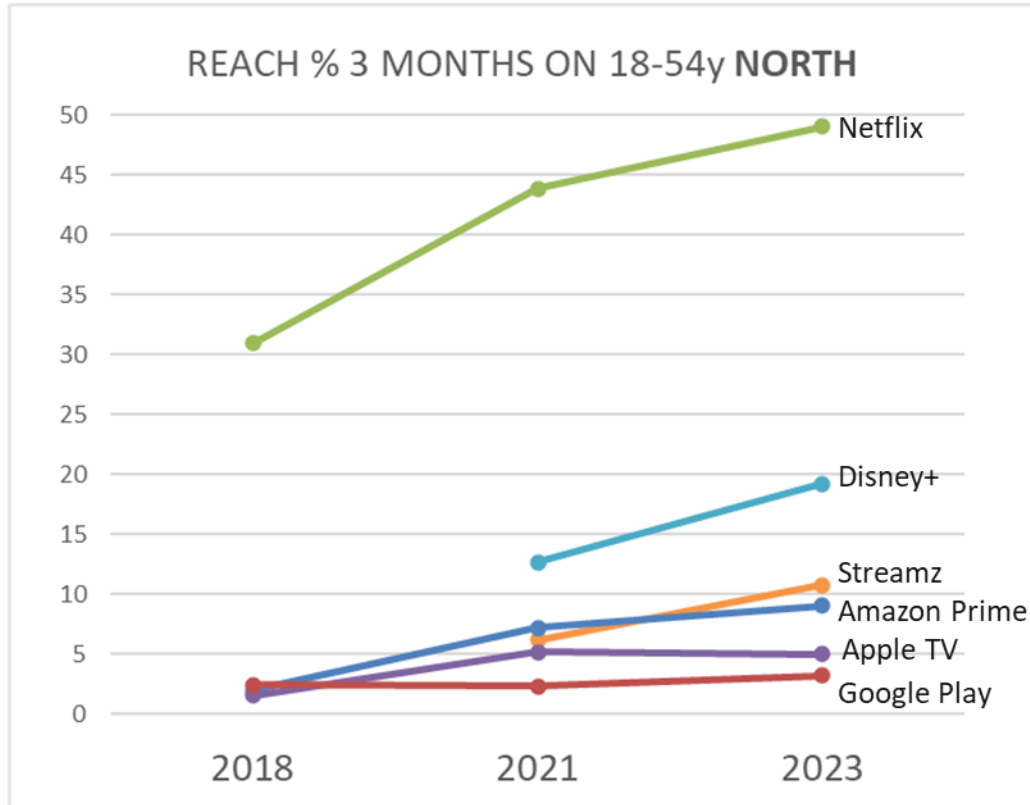
NORTH		Programme	Channel	2023	Average in 000
1	THE MASKED SINGER		VTM	03/02	1859.1
2	HET VERHAAL VAN VLAANDEREN		VRT 1	22/01	1741.3
3	DANK WEERMAN FRANK		VRT 1	20/03	1561.9
4	KASTAARS!		VRT 1/VTM/PLAY4	28/01	1494.5
5	DE MOL		PLAY4	07/05	1447.4
6	CHATEAU PLANCKAERT		VRT 1	12/03	1424.6
7	DE SLIMSTE MENS TER WERELD		PLAY4	21/12	1407.3
8	WIELRENNEN. RONDE VAN VLAANDEREN H.		VRT 1	02/04	1374.6
9	EUROVISIE SONGFESTIVAL		VRT 1	13/05	1337.3
10	DOWN THE ROAD		VRT 1	26/11	1326
11	1985		VRT 1	22/01	1304.1
12	VELDRIJDEN. WK. HOOGERHEIDE - ELITE H.		VRT 1	05/02	1276.7
13	VREDE OP AARDE		VRT 1	25/12	1244.9
14	THUIS		VRT 1	02/03	1208.8
15	ARCADIA		VRT 1/NPO3	19/03	1203.4
16	HET 7 UUR-JOURNAAL		VRT 1	20/03	1201.7
17	FACTCHECKERS		VRT 1	22/11	1172.6
18	HET HUIS		VRT 1	02/01	1130.1
19	ONDER VUUR		VRT 1	08/01	1106.3
20	DE TWAALF		VRT 1	22/10	1068.8
21	HET HOGE NOORDEN		VRT 1	21/02	1045.5
22	WIELRENNEN. PARIJS-ROUBAIX H.		VRT 1	09/04	1033.4
23	WIELRENNEN. RONDE VAN VLAANDEREN D.		VRT 1	02/04	1030.7
24	SWITCH		VRT 1	05/01	1018.6
25	INTERVIEW MET DE GESCHIEDENIS		VRT 1	04/09	1013.8

SOUTH		Programme	Channel	2023	Average in 000
1	FOOT. EURO QUALIF - SUEDE/BELGIQUE		La Une	24/03	845.1
2	FOOT. AMICAL - ALLEMAGNE/BELGIQUE		La Une	28/03	804.6
3	FOOT. EURO QUALIF - ESTONIE/BELGIQUE		La Une	20/06	770.5
4	FOOT. EURO QUALIF - BELGIQUE/AUTRICHE		La Une	17/06	677.9
5	FOOT. EURO QUALIF - AUTRICHE/BELGIQUE		La Une	13/10	666.7
6	FOOT. EURO QUALIF - BELGIQUE/ESTONIE		La Une	12/09	660.8
7	RTL INFO 19H		RTL tvi	21/03	656.3
8	FOOT. EURO QUALIF - BELGIQUE/SUEDE		La Une	16/10	655.4
9	FOOT. EURO QUALIF - BELGIQUE/AZERBAIDJAN		La Une	19/11	631.5
10	HPI, HAUT POTENTIEL INTELLECTUEL		La Une	16/05	618.5
11	FACE AU JUGE		RTL tvi	19/03	618.3
12	LE 19.30		La Une	02/11	606.7
13	EDITION SPECIALE - LE 19.30		La Une	17/10	600.2
14	ENFOIRES UN JOUR, TOUJOURS		TF1	03/03	575.9
15	ENQUETES		RTL tvi	21/03	559.4
16	RTL INFO EDITION SPECIALE		RTL tvi	17/10	553.9
17	FOOT. AMICAL - BELGIQUE/SERBIE		La Une	15/11	497.8
18	EN ROUTE AVEC LA POLICE		RTL tvi	16/04	489.1
19	ED. SPECIALE - FUSILLADE DANS LES RUES DE BRUX.		La Une	16/10	478.3
20	TOP CHEF		RTL tvi	06/03	475
21	APPEL D'URGENCE		RTL tvi	22/01	473
22	MATHILDE, DANS LES PAS D'UNE REINE ENGAGEE		RTL tvi	20/01	471.5
23	MARIES AU PREMIER REGARD		RTL tvi	26/03	463.5
24	JEUDI EN PRIME		La Une	22/06	461.1
25	L'AMOUR EST DANS LE PRE		RTL tvi	17/12	455.0

## 6. WATCHING OTHER CONTENT (any screen)

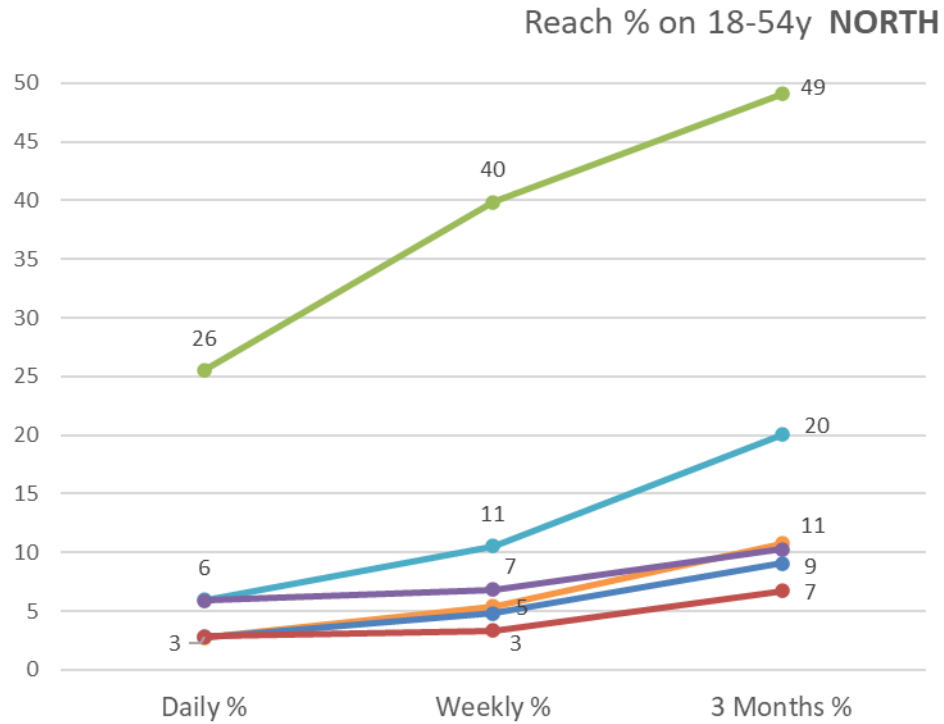


# ► Evolution of streaming platforms 2018-2021-2023 on 18-54y



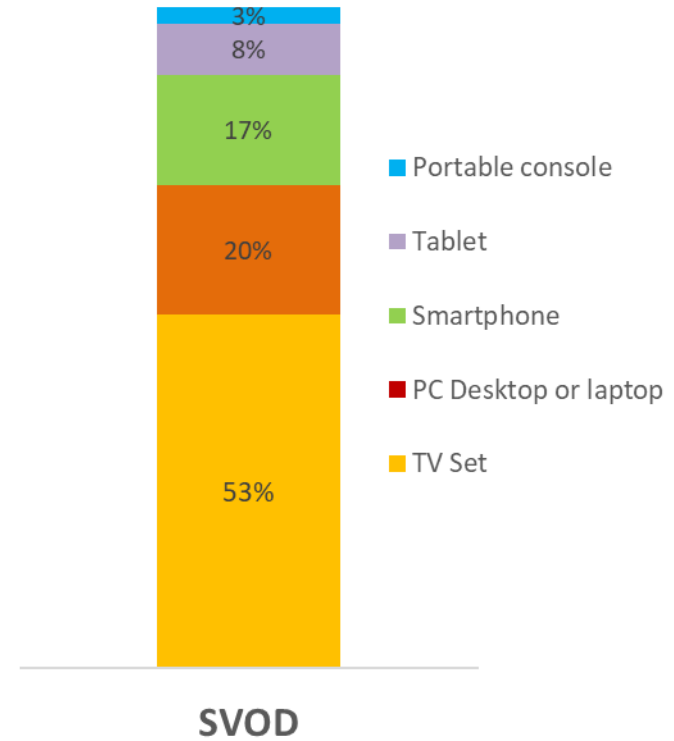


# ► Other content : 2023 reach of streaming platforms on 18-54y - **NORTH**



- Netflix
- Disney +
- Streamz
- Apple TV
- Amazon Prime
- Google Play films

### SVOD Devices used by 18-54 NORTH

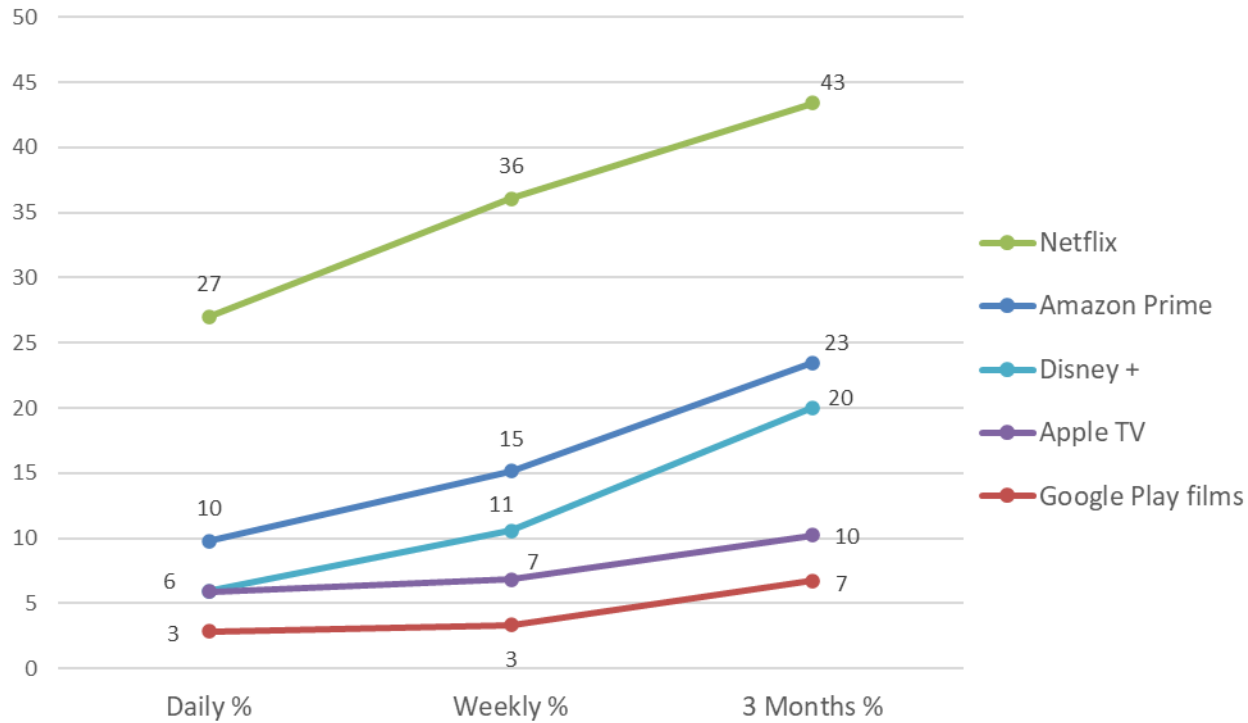




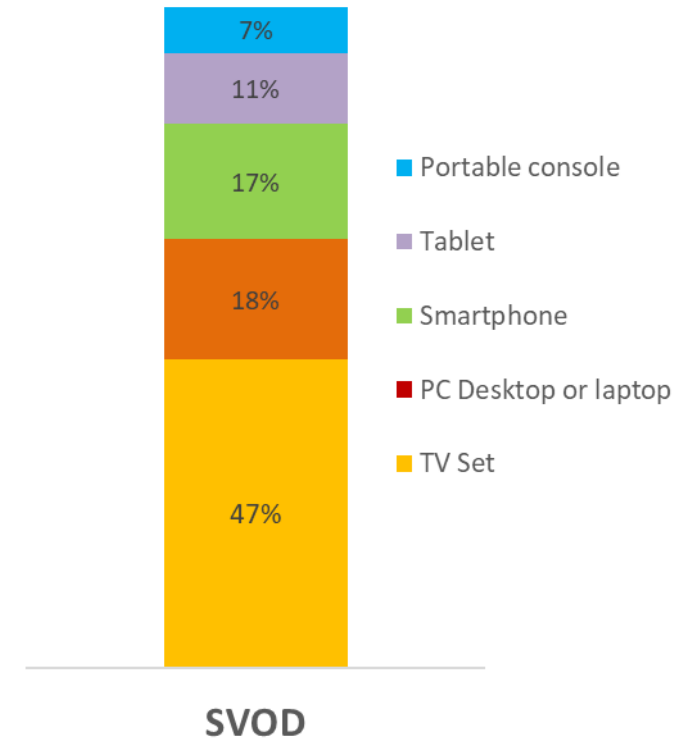


# ► Other content : 2023 reach of streaming platforms on 18-54y - **SOUTH**

### Reach % on 18-54y **SOUTH**



### SVOD Devices used by 18-54 SOUTH



# Cinema Report 2023

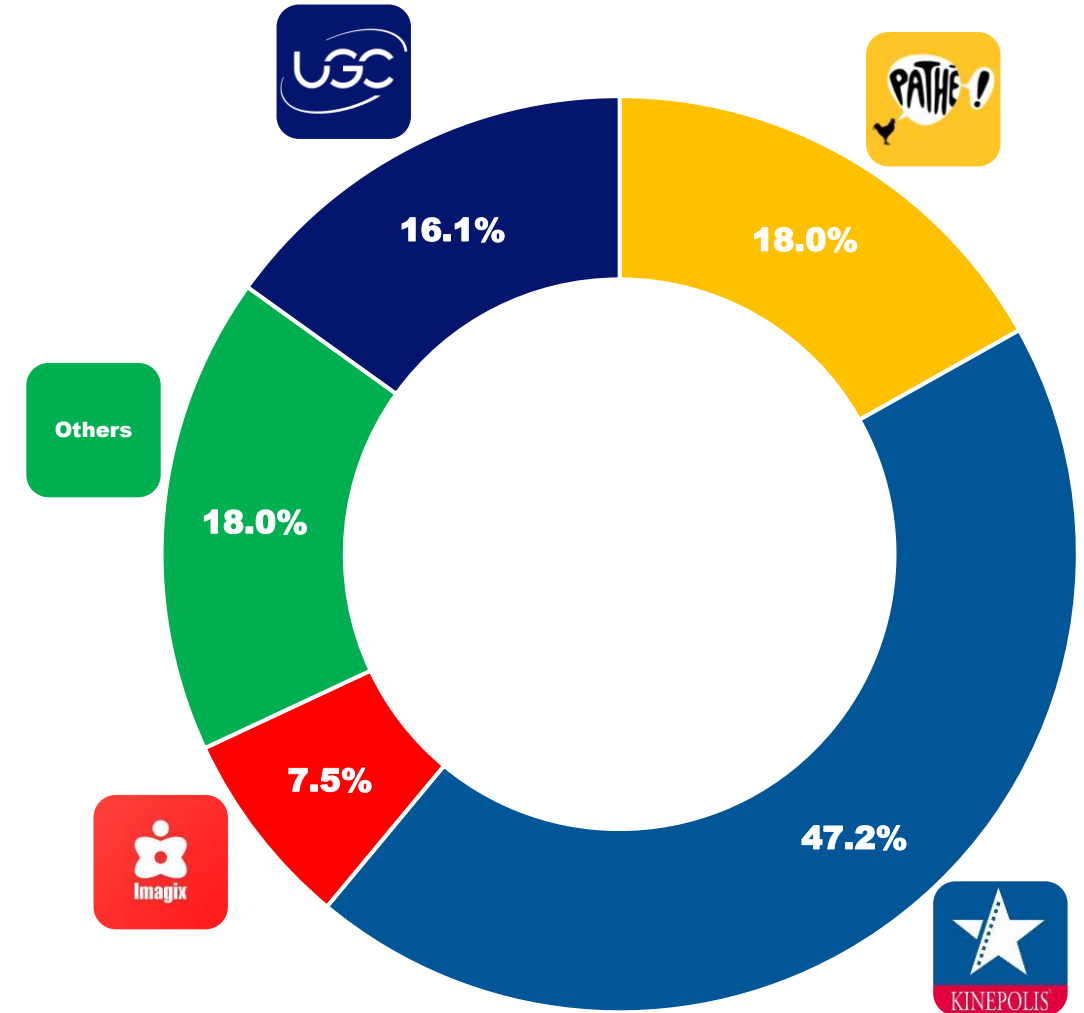
## AGENDA

1. Cinema Market
2. Cinema Investments
3. Cinema Advertisers
4. Admissions
5. Content



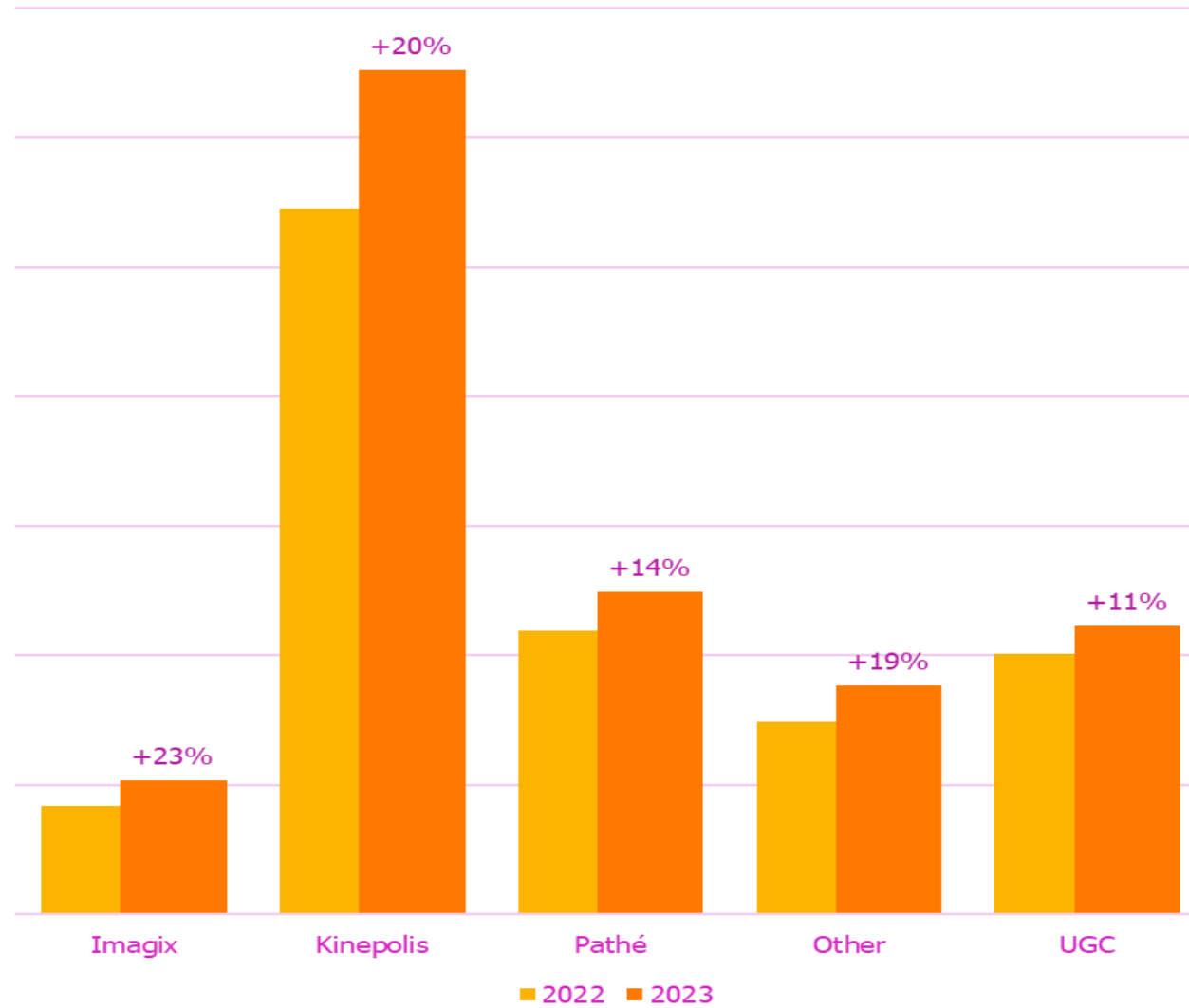
## ► Commercial Cinema Market Belgium

	Brightfish	Transfer
# of cinemas	40	7
# of screens	315	74
# of admissions	11,586,951	2,226,470
# of seats	74.143	14.744
MDB Invest (in 000's)	€29.039	€3.091
Commercial share of Market	90.4%	9.6%



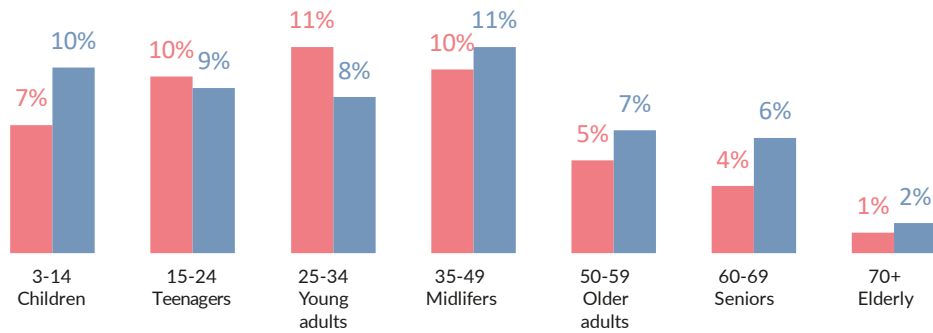
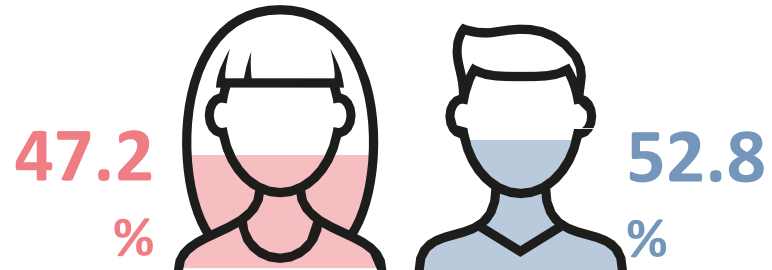


## ► Cinema Market Evolution

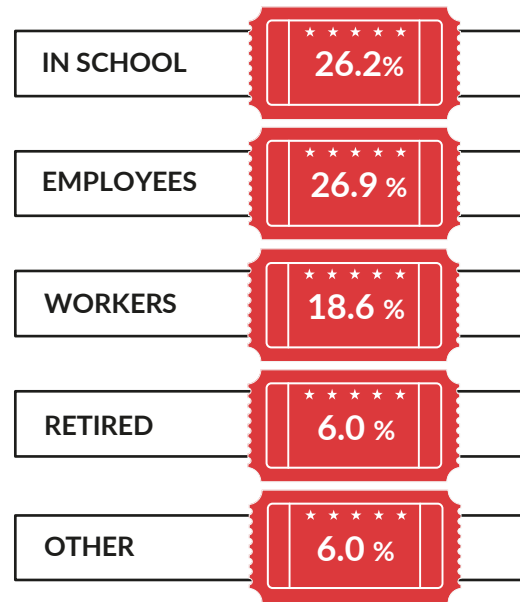


Source : Cinedata 2022/2023 admissions

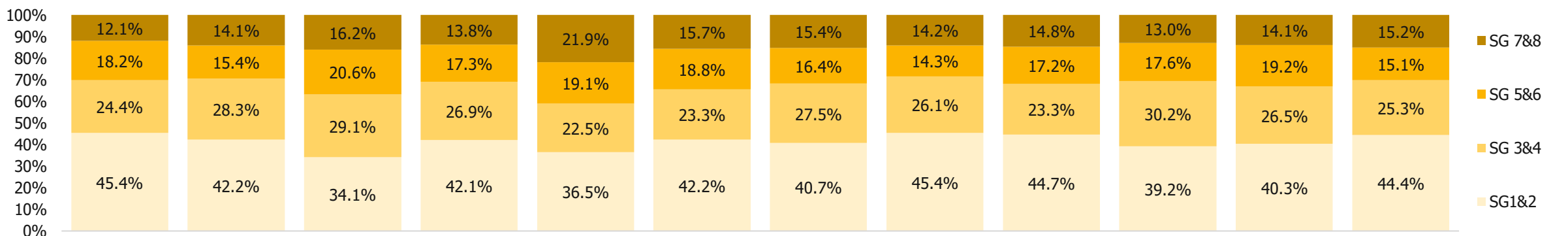
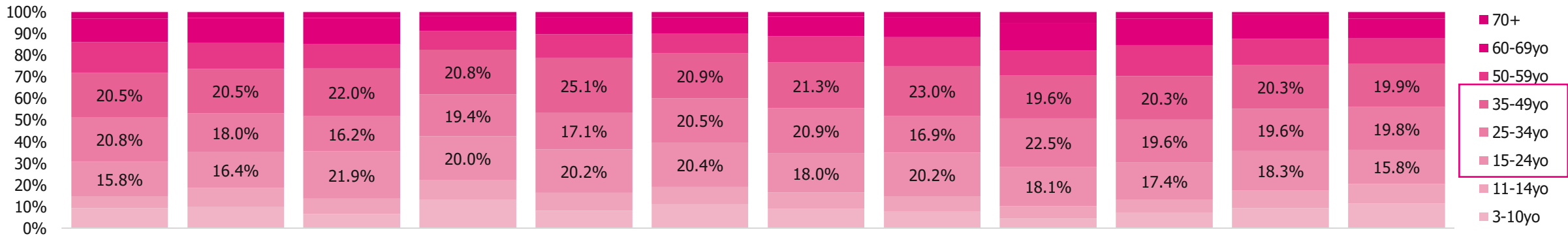
# ► Vertigo Research Cinema Profile – CIM Source



## THEY ARE...



# Profile Evolution

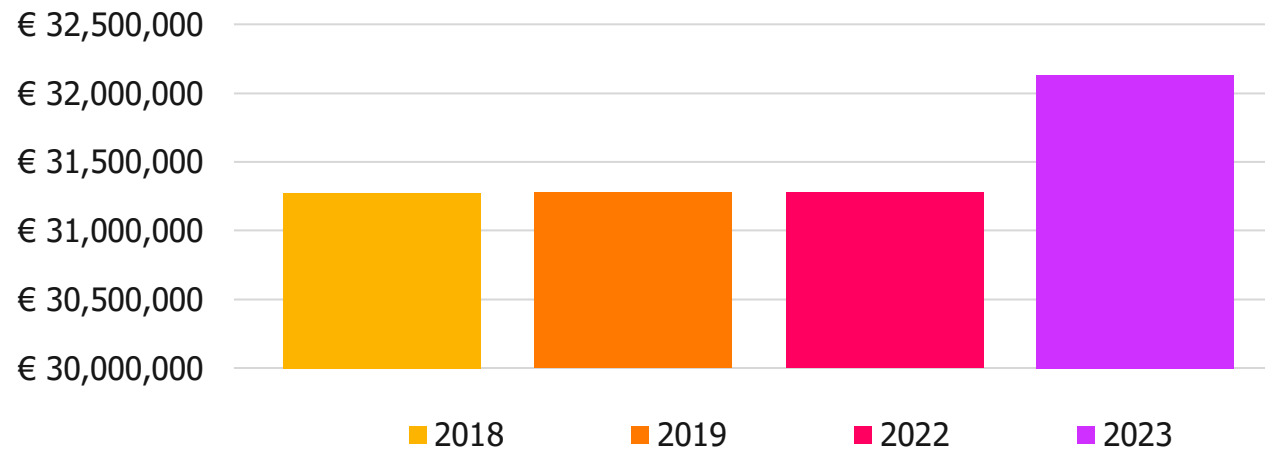


## 2. CINEMA INVESTMENTS



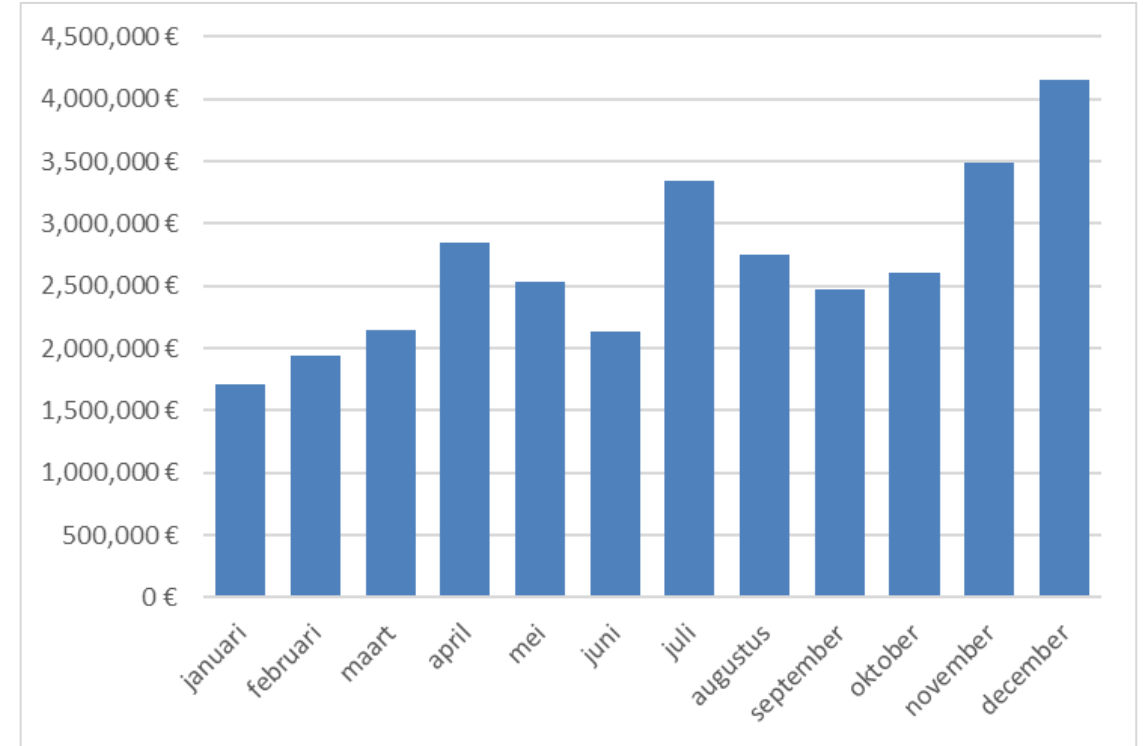
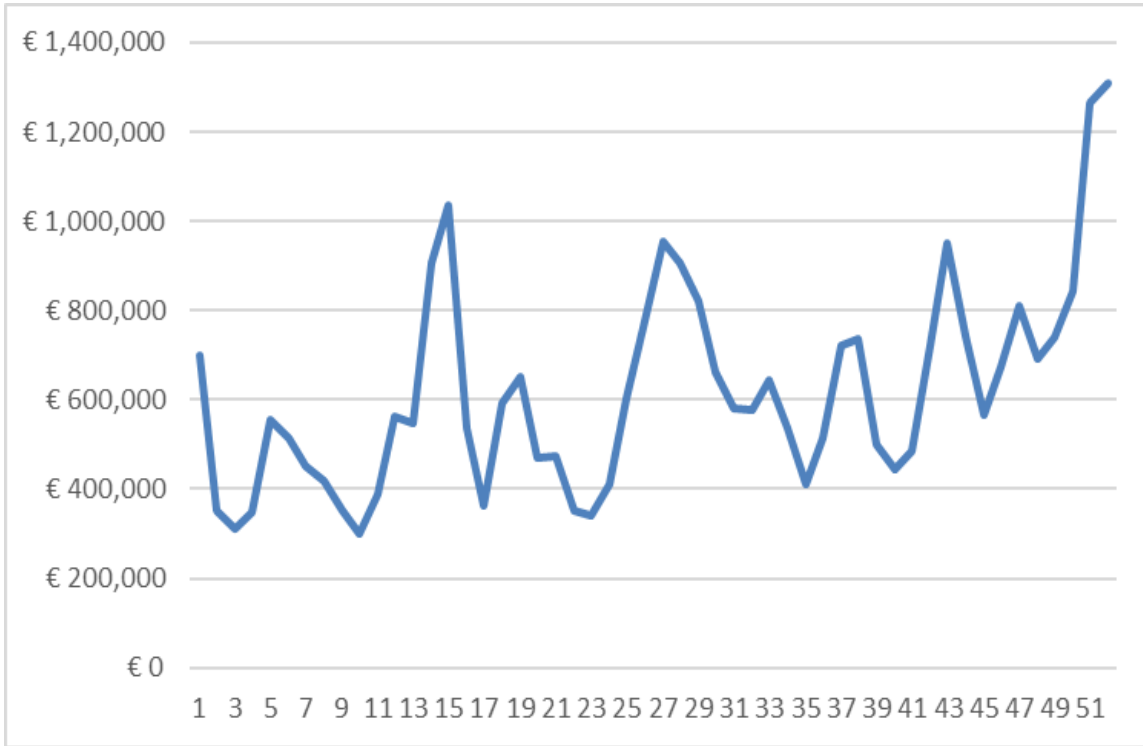
## ► Key facts

<b>Cinema</b>	<b>2018</b>	<b>2019</b>	<b>2022</b>	<b>2023</b>
Sectors	56	60	60	49
Advertisers	348	386	260	270
Brands	432	480	297	304
Avg spot length	41.9"	39.5"	33.9"	33.2"
Total ad spend	€ 31,276,830	€ 31,280,517	€ 31,280,197	€32,129,602





# ► GROSS CINEMA INVESTMENTS PER WEEK / MONTH



► GROSS CINEMA INVESTMENTS PER ECONOMICAL GROUP

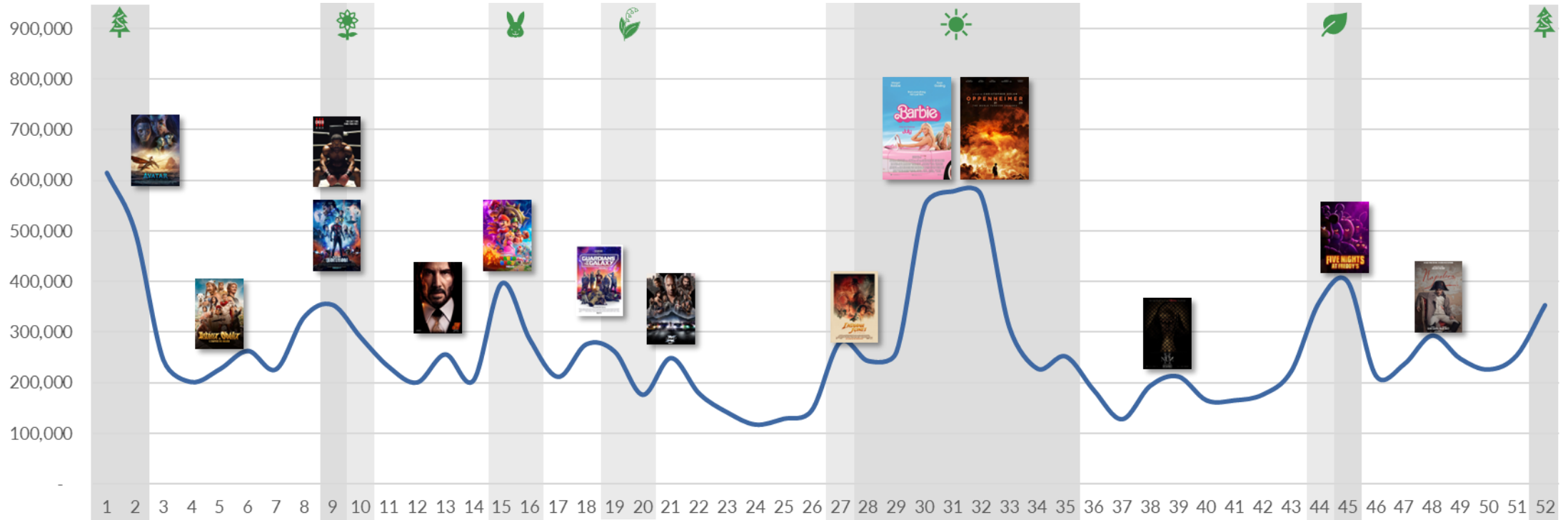
Eco Group	2022 Spend	2023 Spend	
ALIMENTATION	€ 11,580,470	€ 6,524,178	▼
BEAUTE - HYGIENE	€ 712,260	€ 258,145	▼
CORPORATE	€ 1,288	€ 23,637	▲
CULTURE, TOURISME, LOISIRS, SPORTS	€ 8,444,190	€ 9,168,091	▲
DISTRIBUTION	€ 2,692,288	€ 2,775,579	▲
ENERGIE - COMBUSTIBLES	€ 6,578	€ 318,198	▲
EQUIPEMENT MAISON - BUREAU	€ 278,010	€ 39,325	▼
HABILLEMENT - ACCESSOIRES	€ 151,290	€ 111,969	▼
SANTE - BIEN ETRE	€ 29,145	€ 222,553	▲
SERVICES	€ 3,372,651	€ 5,458,832	▲
TELECOM	€ 628,585	€ 1,770,988	▲
TRANSPORT	€ 3,383,442	€ 5,458,107	▲

► GROSS CINEMA INVESTMENTS – ADVERTISERS TOP 25

Advertiser	Spend
COCA-COLA SERVICES	€ 3,841,220
VOLVO CARS	€ 2,253,920
IKEA BELGIUM	€ 1,405,619
DUVEL MOORTGAT BROUWERIJ	€ 1,351,984
D'IETEREN AUTO	€ 1,120,379
BNP PARIBAS FORTIS	€ 764,064
ORANGE	€ 660,442
ETAT FEDERAL	€ 630,354
BMW BELGIUM	€ 559,546
AXA BANQUE & ASSURANCES	€ 511,605
COMPAGNIE DES ALPES	€ 448,487
REGION WALLONNE	€ 442,505
PROXIMUS	€ 408,953
UNILEVER BELGIUM FOODS & HPC	€ 350,227
FOST PLUS	€ 346,067
ASTARA WESTERN EUROPE	€ 342,975
ENGIE	€ 318,198
ING BELGIQUE	€ 306,816
CARREFOUR	€ 292,952
NINTENDO	€ 290,468
LEGO BELGIUM	€ 289,844
PAYCONIQ	€ 268,961

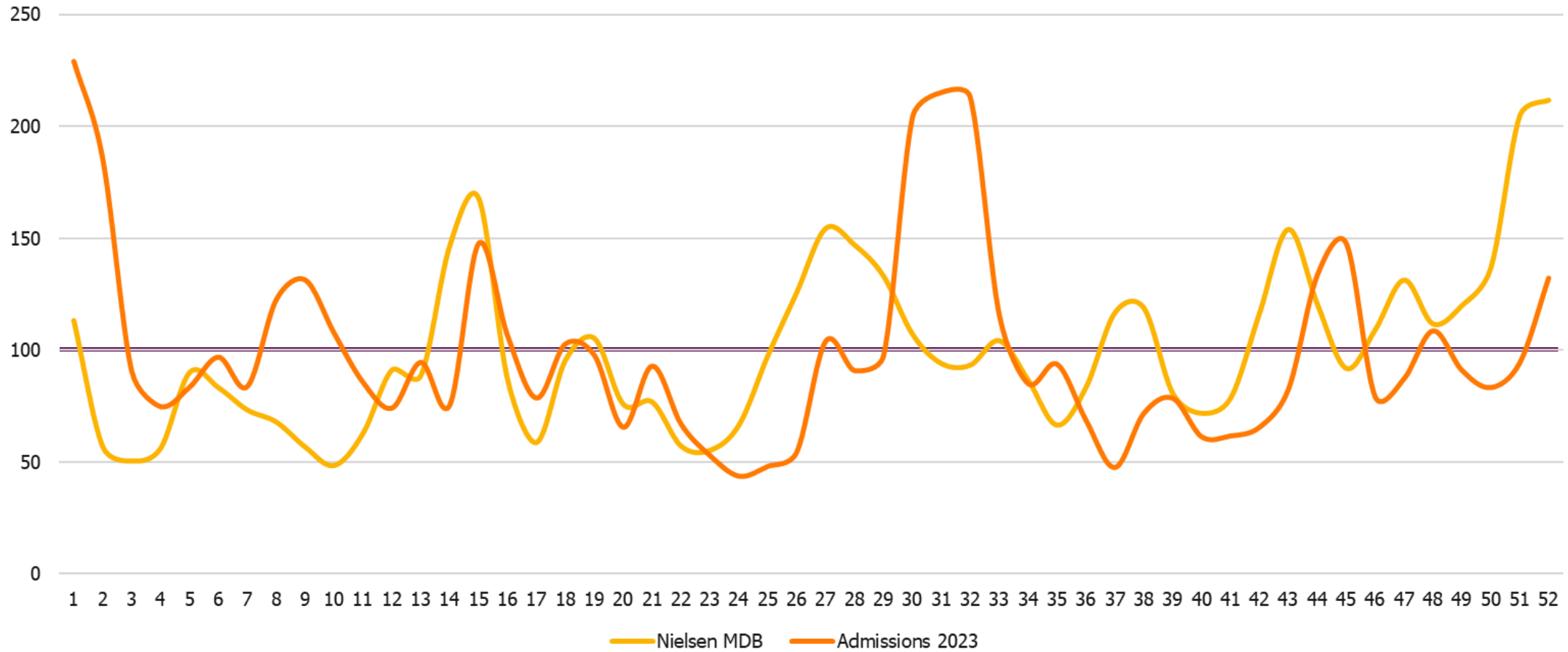
# 4. ADMISSIONS

## ► Vacations and content drive admissions





## ► Admissions VS Investments - Indexed



Source : Cinedata 2023 all admissions + MDB Nielsen 2023

# 5. CONTENT

## ► Top 20 movies 2023

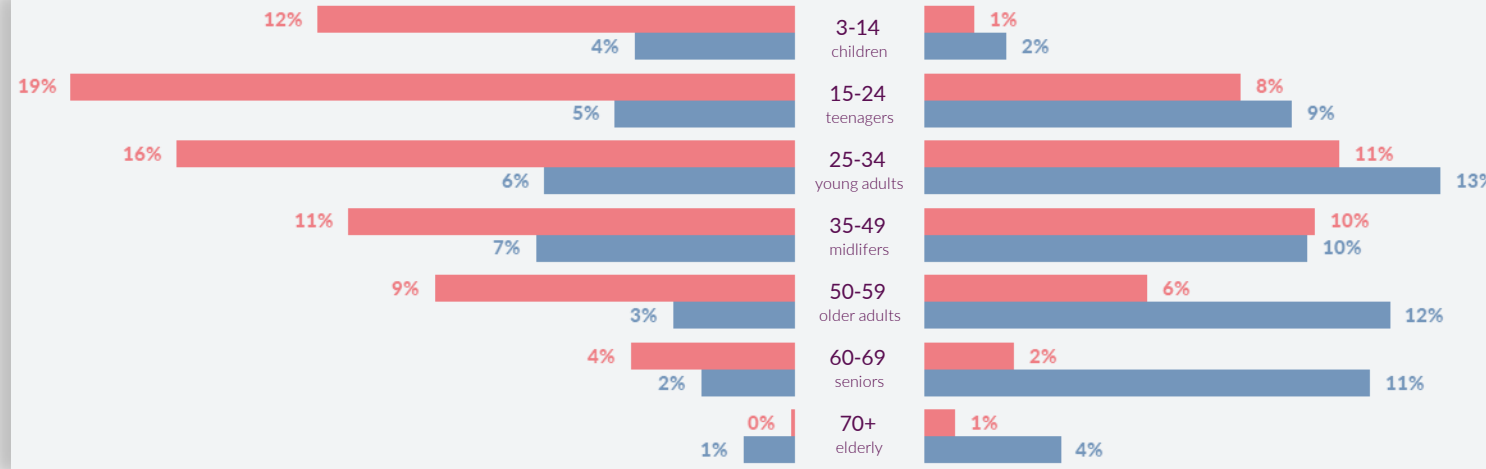
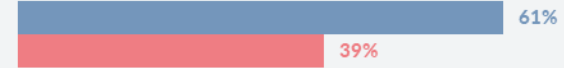
	Title	2023	Lifetime
1	Avatar 2: the Way of Water	898,000	1.322.472
2	Barbie	882,579	
3	The Super Mario Bros. Movie	742,479	
4	Oppenheimer	624,858	
5	Elemental	346,967	
6	The Hunger Games: the Ballad of Songbirds and Snakes	271,125	346.492
7	Fast & Furious 10	257,458	
8	Guardians of the Galaxy Vol. 3	241,434	
9	The Little Mermaid	240,954	
10	Puss in Boots 2: the Last Wish	239,806	322.528
11	Indiana Jones and the Dial of Destiny	239,704	
12	Mission: Impossible 7	227,693	
13	Napoleon	227,342	299.142
14	Astérix & Obélix: l'Empire du Milieu <b>(FR)</b>	212,666	
15	Wonka	208,758	537.776
16	Creed III	208,178	
17	The Meg 2: the Trench	190,978	
18	John Wick: Chapter 4	190,244	
19	Spider-Man: Across the Spider-Verse	189,461	
20	The Nun 2	172,027	





### BARBIE

### OPPENHEIMER



"Barbie" n=1028

Source: Vertigo Research 2023

"Oppenheimer" n=444

# RADIO Report 2023

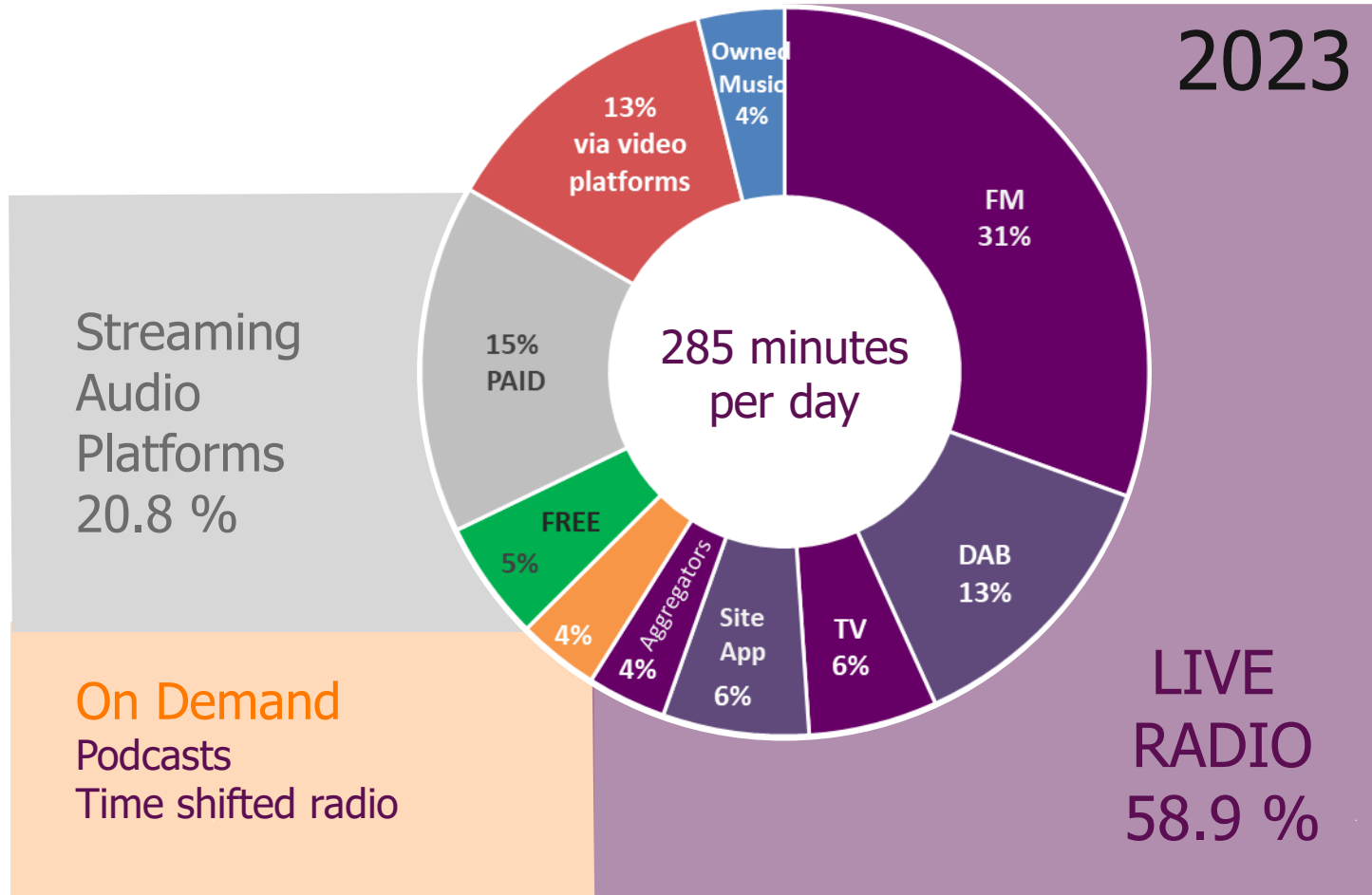
## AGENDA

1. What is Radio ?
2. Radio Investments
3. Radio listening (on all devices)
4. Digital evolutions





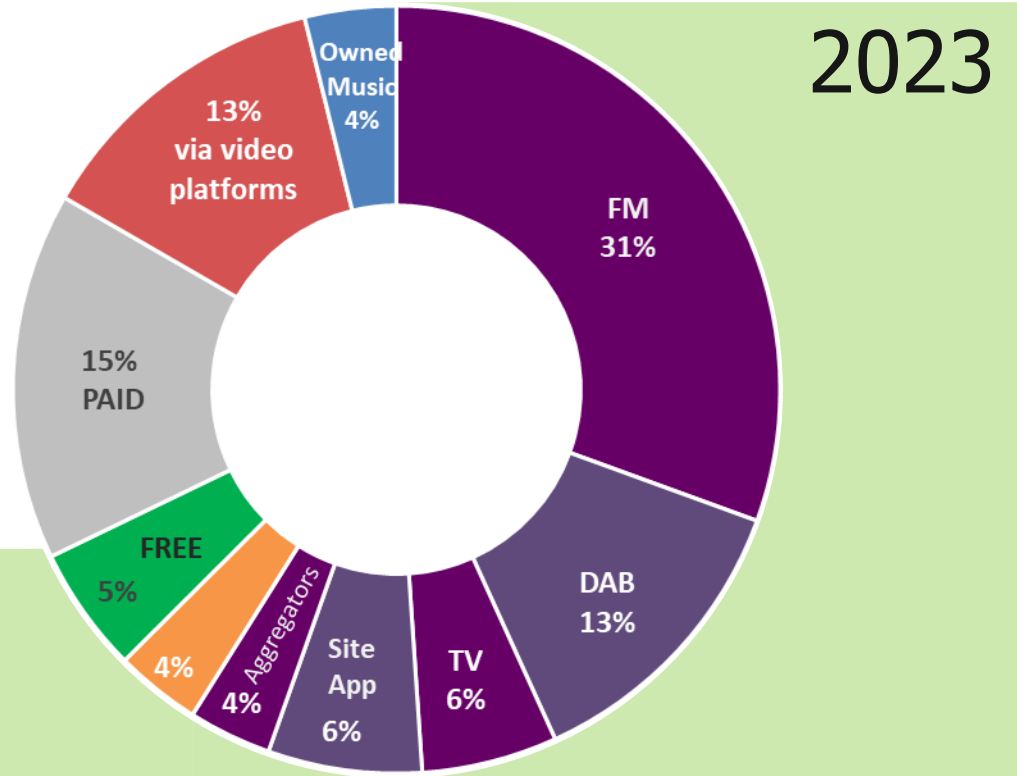
► What is Radio (target 18-54y)



Evolution	2022	2023	index
Live FM	34.5%	30.6%	89
Live DAB	11.8%	12.7%	107
Live via TV	5.5%	5.7%	104
Live via Site/App	5.6%	6.5%	117
Live via Aggregators	3.1%	3.5%	115
On demand audio	3.8%	3.6%	95
Streaming platforms	20.0%	20.8%	104
Via videoplatform	10.7%	12.8%	119
Owned music	5.1%	3.9%	75
<b>TOTAL minutes</b>	<b>307</b>	<b>285</b>	<b>93</b>



## ► What is Commercial Audio (target 18-54y)

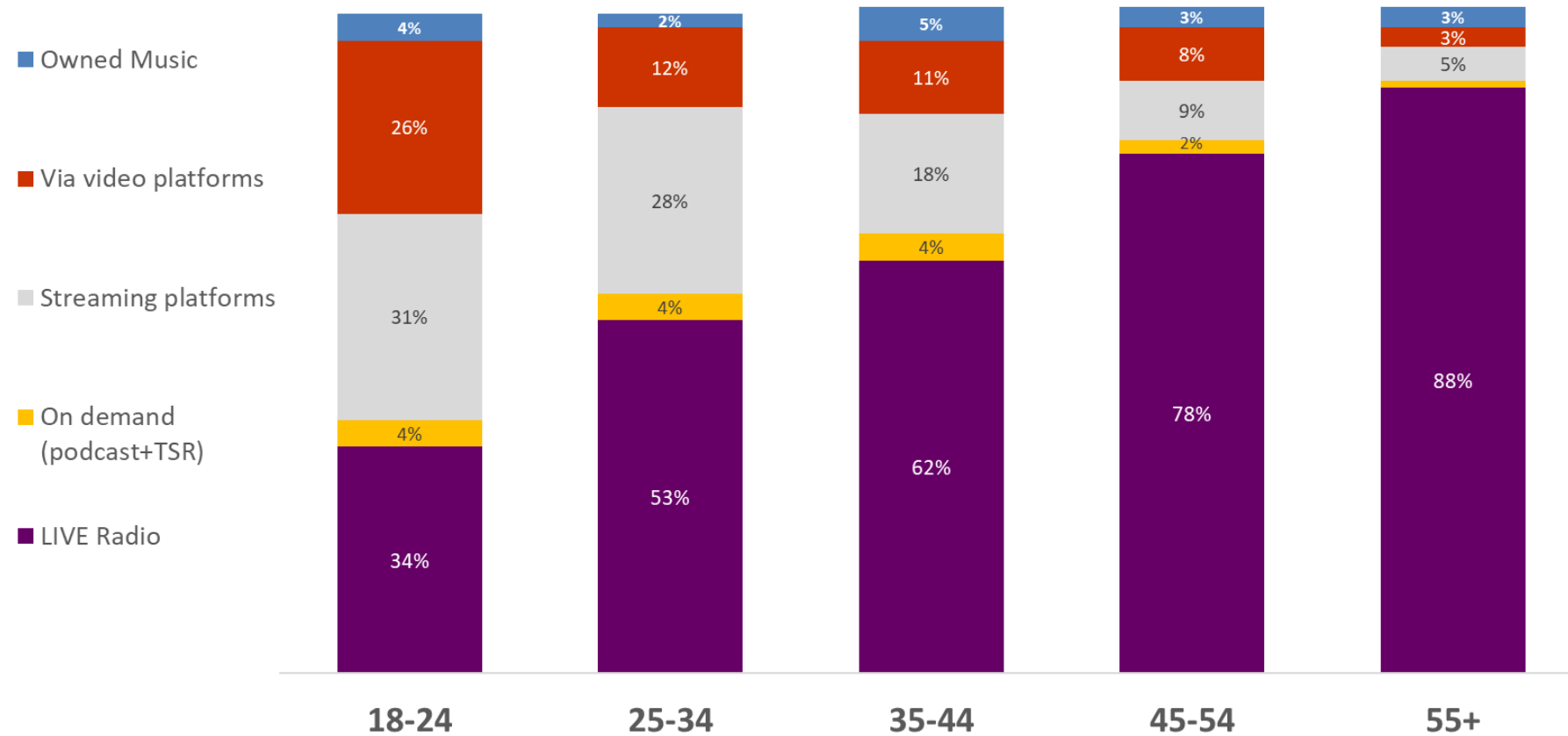


Live Radio is more than 10 x  
the volume of  
FREE Streaming platforms



## ► Audio content types breakdown by age

Live Radio is leading in every age band



## 2. RADIO INVESTMENTS



## ► Key figures

Number of :	2019	2020	2021	2022	2023	Index vs 2023
Advertisers	1 515	1 144	1 242	1 330	1 315	99
Brands	2 178	1 495	1 648	1 864	1 879	101
Spotlength (spots only)	19,5"	19,8"	19,9"	19,1"	18,7"	99

### North (spots only)

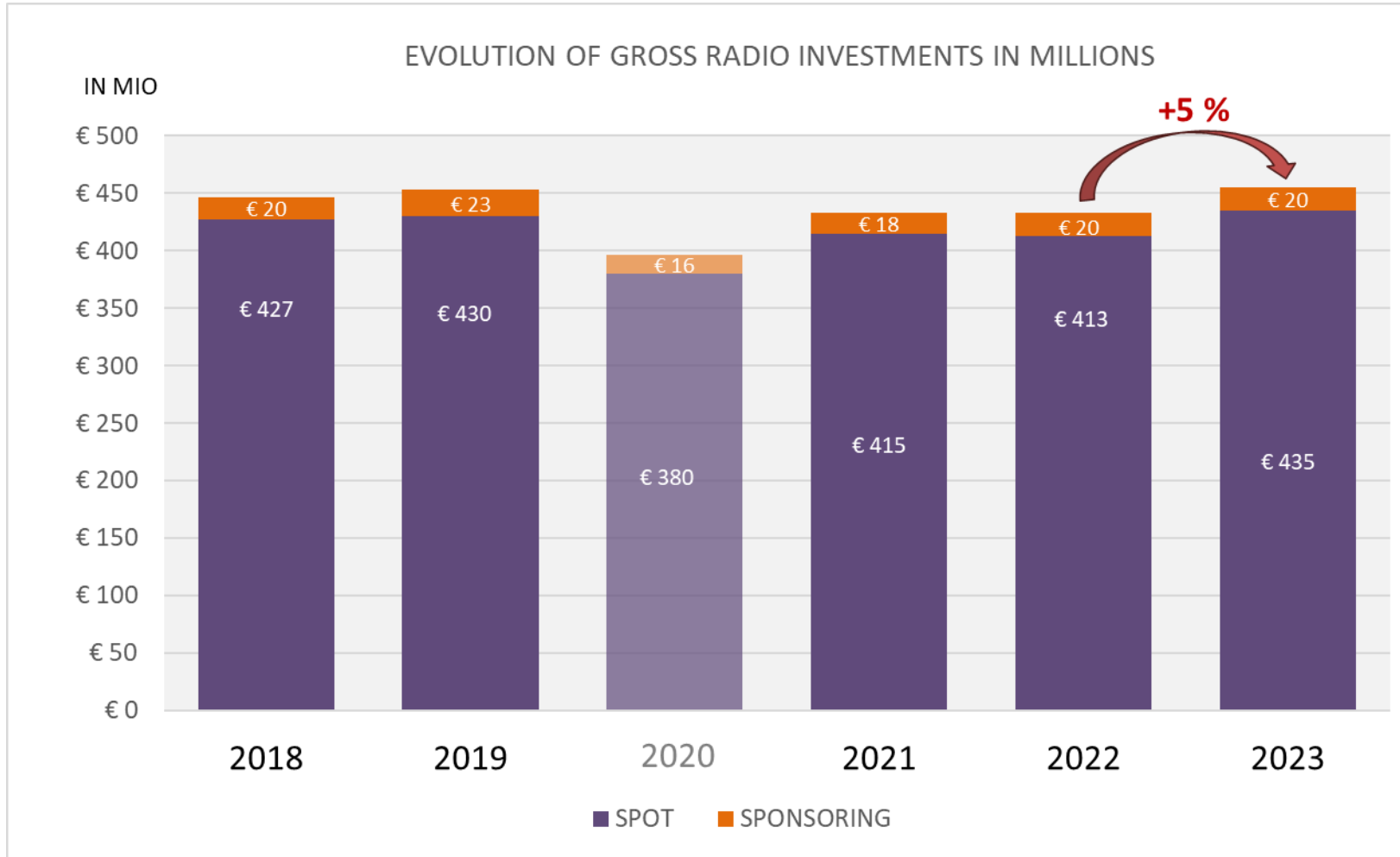
Number of channels	9	9	9	9	9	100
Spots	497 146	436 662	487 007	511 889	577,675	113
Spots/channel/day	151	133	148	156	176	113
GRP 18-54	1343 753	1117 554	1089 108	1057 835	998 450	94
GRP per spot	2.7	2.6	2.2	2.1	1.7	82

### South (spots only)

Number of channels	10	10	10	10	10	100
Spots	728 444	590 319	671 205	680 032	657,581	97
Spots/channel/day	200	161	184	186	180	97
GRP 18-54	809 579	625 484	688 543	690 293	582,470	84
GRP per spot	1.1	1.1	1.0	1.0	0.9	87



## ► Radio gross investment

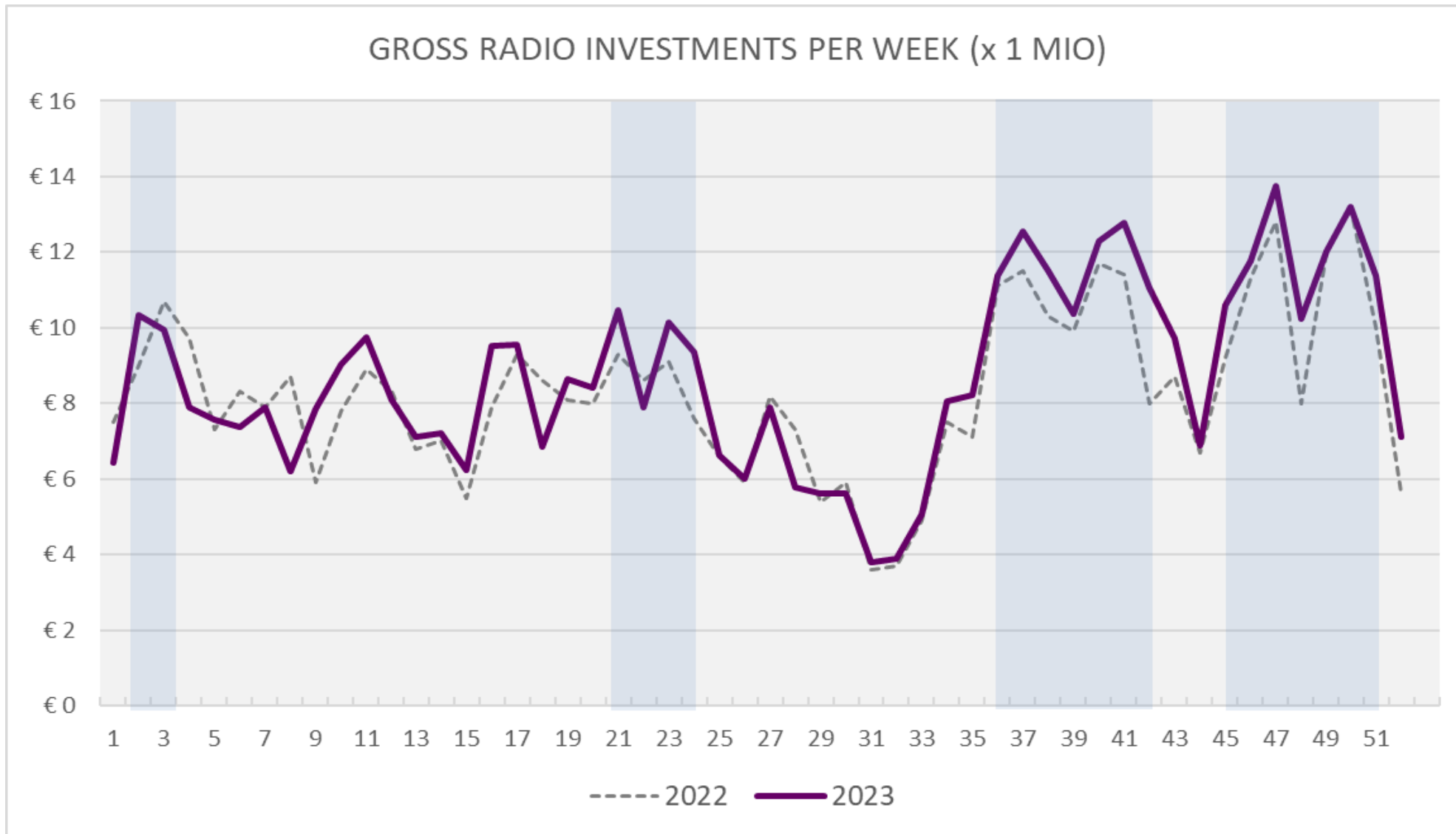


Market has grown with 5% and is again on pre-covid level (excl inflation)





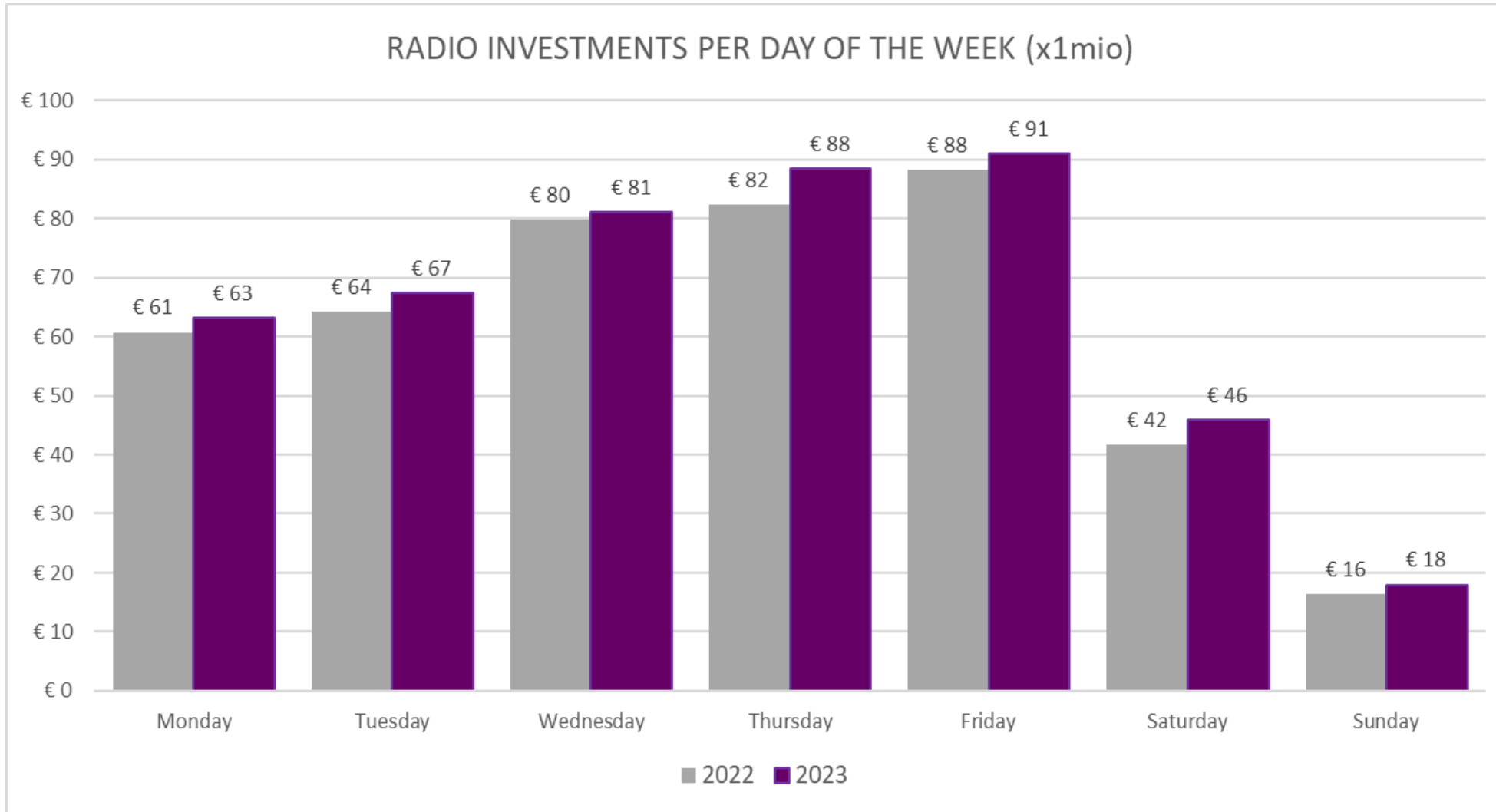
## ► Gross Radio investments – By Week



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



## ► Gross Radio investments – by day-of-the-week





## ► Gross Radio investments by economic group

Economical group (in mio)		2019	2020	2021	2022	2023	<i>index vs 2022</i>
1	DISTRIBUTION	€ 138.9	€ 133.6	€ 155.5	€ 172.2	€ 182.0	106
	Sector share in total spend	31%	34%	36%	40%	40%	
2	SERVICES incl. FINANCE	€ 91.5	€ 81.4	€ 93.6	€ 83.7	€ 78.1	93
3	TRANSPORT	€ 77.2	€ 51.6	€ 51.9	€ 46.0	€ 54.9	119
4	CULTURE, TOURISM, FREE TIME, SPORTS	€ 33.9	€ 23.8	€ 33.7	€ 41.7	€ 45.9	110
5	TELECOM	€ 30.6	€ 32.8	€ 31.8	€ 32.2	€ 34.6	107
6	HOME IMPROVEMENT	€ 37.3	€ 27.8	€ 34.3	€ 31.5	€ 29.2	93
7	FOOD	€ 18.0	€ 15.2	€ 10.2	€ 10.8	€ 11.5	106
8	ENERGY - FUEL	€ 15.2	€ 19.3	€ 13.1	€ 7.0	€ 11.4	163
9	HEALTH - WELLNESS	€ 7.7	€ 8.9	€ 5.6	€ 5.6	€ 4.8	86
10	BEAUTY - HYGIENE	€ 2.0	€ 1.2	€ 2.6	€ 1.5	€ 1.2	80
11	CLOTHES - ACCESSOIRES	€ 0.1	€ 0.1	€ 0.7	€ 1.0	€ 1.0	100
12	OTHER	€ 0.5	€ 0.0	€ 0.2	€ 0.3	€ 0.2	67
<b>TOTAL</b>		<b>€ 453</b>	<b>€ 396</b>	<b>€ 433</b>	<b>€ 434</b>	<b>€ 455</b>	<b>105</b>

continuous growth

continuous decline

recovery year

continuous growth

recovery year

bad year

continuous decline



## ► Gross Radio investments – top 25 by advertisers

	Advertiser (in mio)	2021	2022	2023	index vs 2022	
1	ALDI	€ 15.4	€ 17.0	€ 18.6	109	continuous growth
2	COLRUYT	€ 13.8	€ 14.1	€ 17.3	123	continuous growth
3	LOTIERIE NATIONALE	€ 14.6	€ 13.6	€ 15.6	114	
4	PROXIMUS	€ 7.9	€ 8.8	€ 11.1	126	excellent year
5	DELHAIZE	€ 8.6	€ 7.3	€ 10.4	142	recovery year
6	ORANGE	€ 7.2	€ 8.0	€ 9.2	114	continuous growth
7	D'IETEREN AUTO	€ 6.4	€ 3.3	€ 8.6	258	excellent year
8	AS WATSON	€ 7.3	€ 7.9	€ 8.4	107	
9	CARREFOUR	€ 6.0	€ 9.6	€ 8.4	88	
10	LIDL & CO	€ 10.2	€ 13.8	€ 7.3	53	bad year
11	VOO	€ 7.8	€ 6.9	€ 6.1	89	
12	VLAAMSE GEMEENSCHAP	€ 5.4	€ 4.9	€ 5.9	120	
13	BOL.COM	€ 4.3	€ 3.9	€ 5.6	143	recovery year
14	BNP PARIBAS FORTIS	€ 6.7	€ 8.2	€ 5.5	67	bad year
15	TOYOTA BELGIUM	€ 2.5	€ 4.7	€ 4.9	106	
16	TELENET OPERATIES	€ 4.4	€ 5.1	€ 4.8	94	
17	KRIJNEN	€ 4.4	€ 4.7	€ 4.4	95	
18	BEBAT	€ 1.9	€ 3.4	€ 4.4	127	continuous growth
19	SUNWEB VAKANTIES	€ 2.3	€ 3.6	€ 4.3	120	continuous growth
20	SNCB/NMBS	€ 1.2	€ 3.5	€ 4.3	123	continuous growth
21	KREFEL	€ 4.2	€ 4.9	€ 4.2	87	
22	MEDIAMARKT BELGIUM	€ 5.0	€ 4.4	€ 4.0	91	
23	DISTRIPAR	€ 3.9	€ 3.7	€ 4.0	108	
24	BRICO INTERNATIONAL	€ 3.2	€ 3.7	€ 3.9	106	
25	ENGIE	€ 5.1	€ 3.3	€ 3.8	116	
<b>TOTAL</b>		<b>€ 160</b>	<b>€ 172</b>	<b>€ 185</b>	<b>107</b>	
Top 25 : % of total spend		37%	40%	41%		

### 3. LISTENING TO RADIO (on all devices)

## ► RADIO MEASUREMENT



### Reported waves in CIM RAM

	Wave	Months
2019/01-04	2019/1	Jan-Apr
2019/05-08	2019/2	May-Aug
2019/09-12	2019/3	Sep-Dec
2020/01-06	2020/1	Jan-Jun
2020/09 - 2021/02	2020/2	Sep-Feb
2021/03-06	2021/1	Mar-Jun
2021/05-08	2021/2	May-Aug
2021/09-12	2021/3	Sep-Dec
2022/01-04	2022/1	Jan-Apr
2022/05-08	2022/2	May-Aug
2022/09-12	2022/3	Sep-Dec
2023/01-04	2023/1	Jan-Apr
2023/05-08	2023/2	May-Aug
2023/09-12	2023/3	Sep-Dec

### NOTE

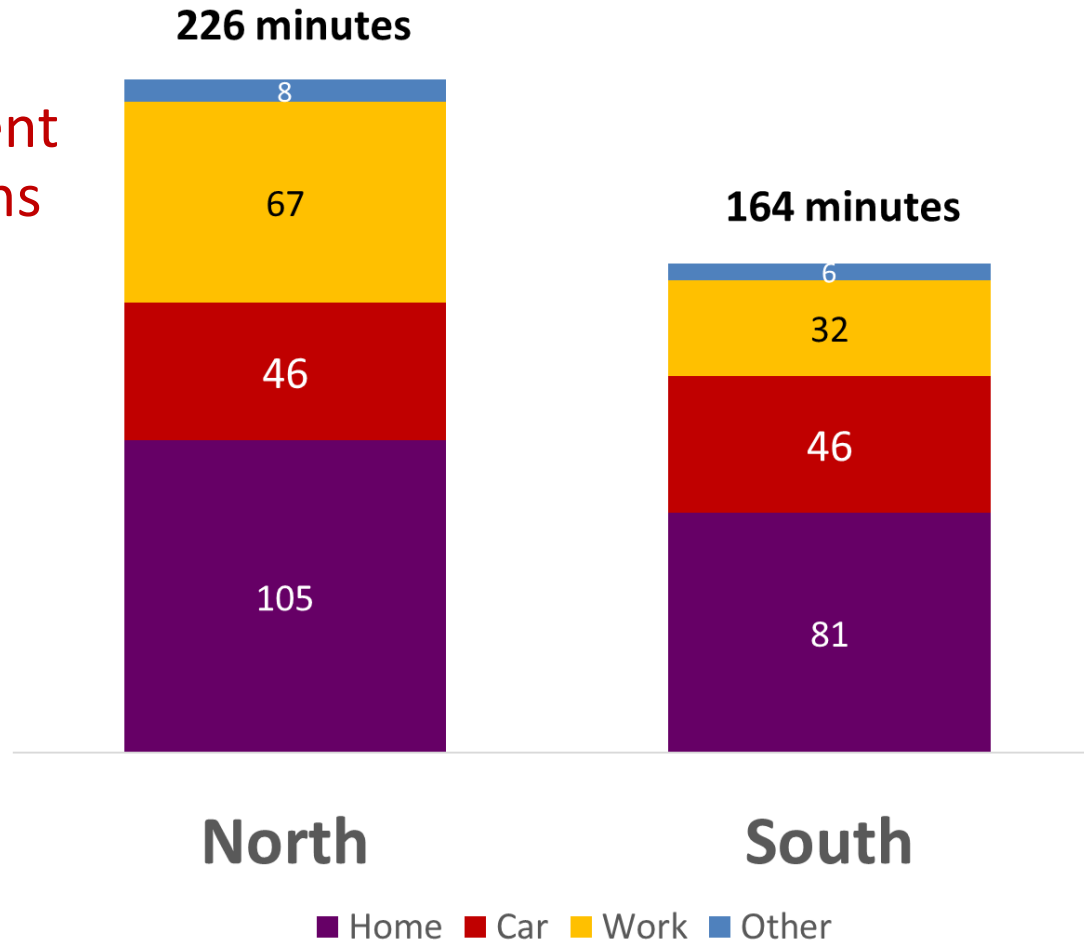
As CIM RAM is declared behaviour all radio listening is reported, on all devices – digital and analog.



## ▶ Radio use in the North versus the South

RADIO USE 18-54 IN MINUTES in 2023

Radio at work is different due to historical reasons and type of work

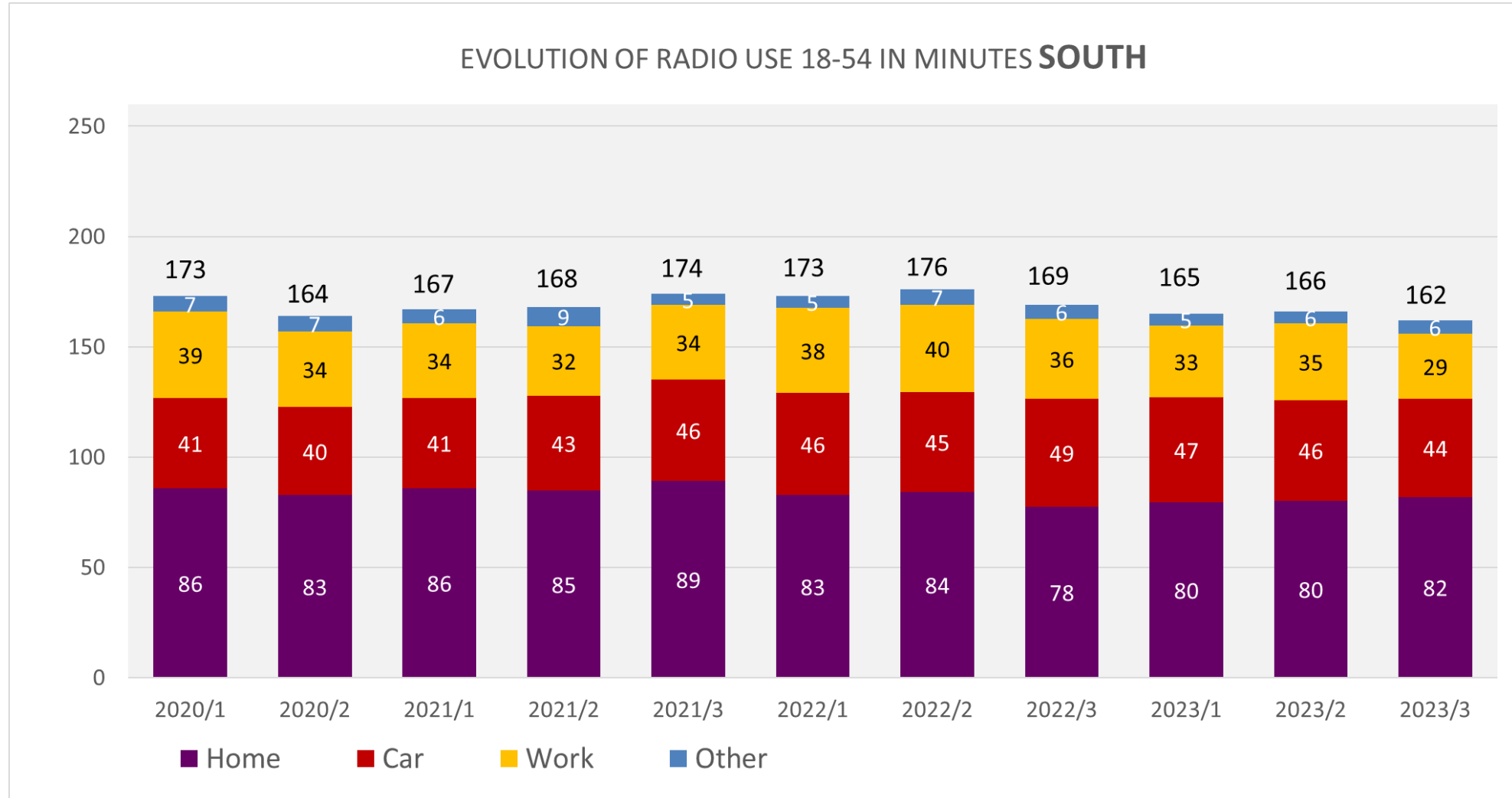


Radio at home is antagonist to TV. This explains the difference between regions



# ► EVOLUTION OF RADIO LISTENING (WITH SPLIT BY LOCATION) SOUTH

## Stable on all locations

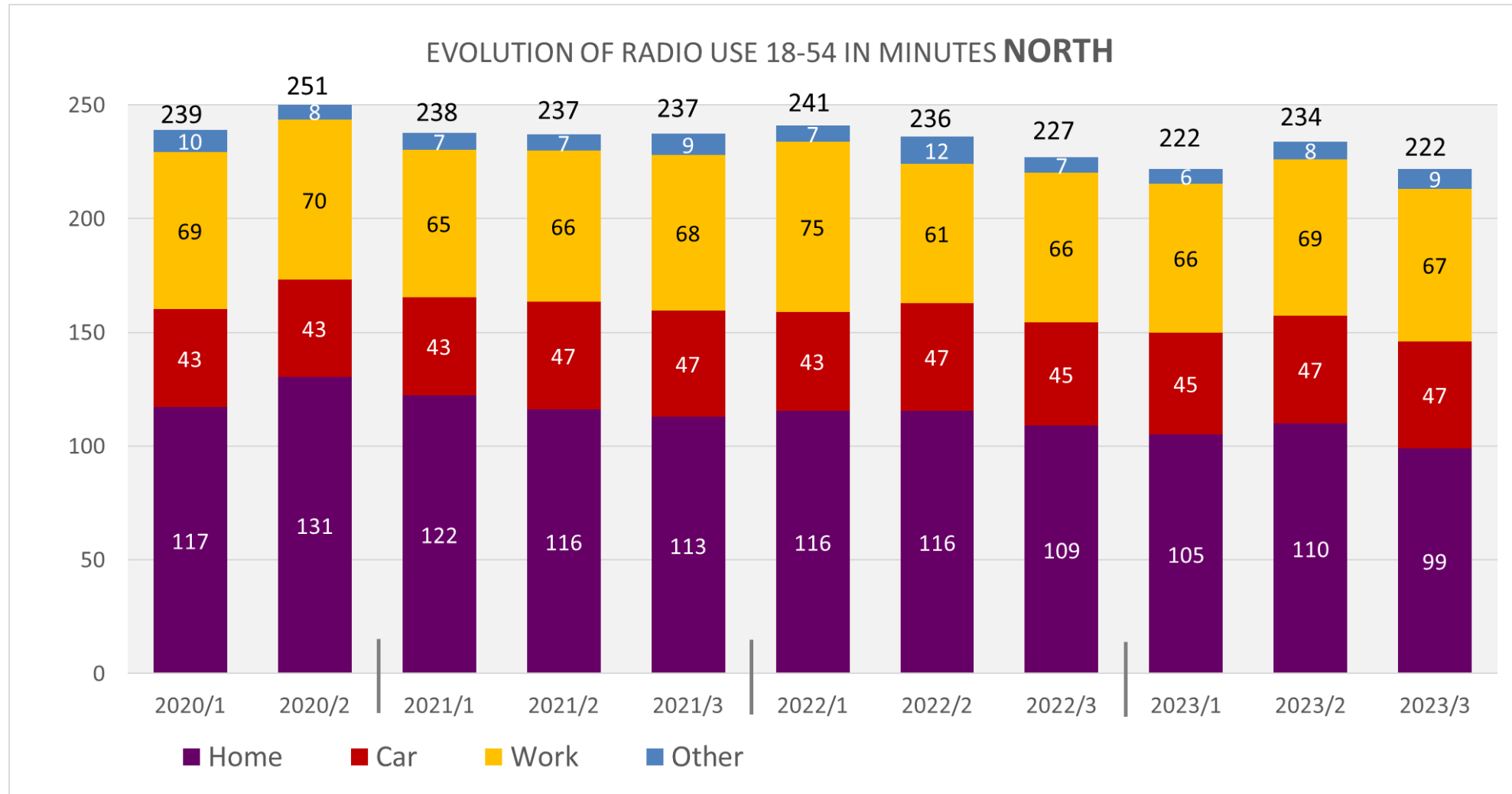






# ► EVOLUTION OF RADIO LISTENING (WITH SPLIT BY LOCATION) NORTH

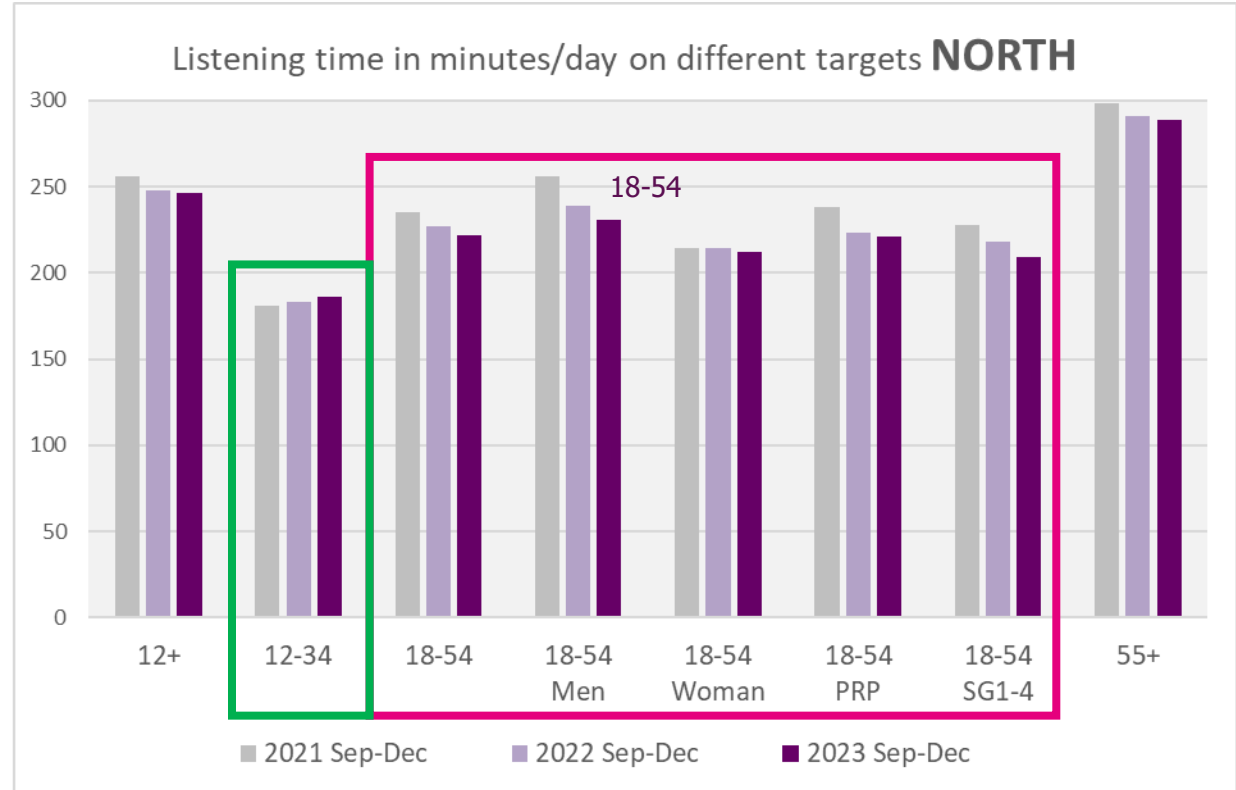
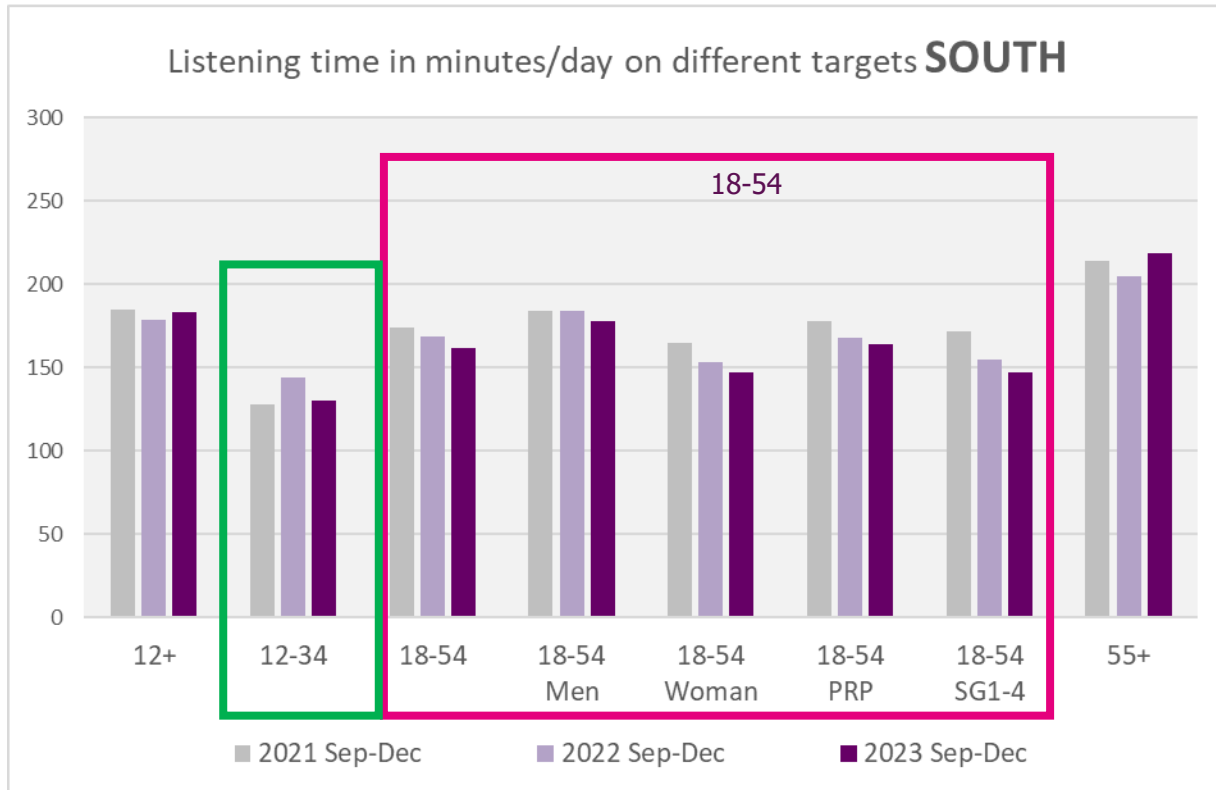
## Declining at home but stable on other locations



# ▶ TIME RADIO LISTENING PER TARGET

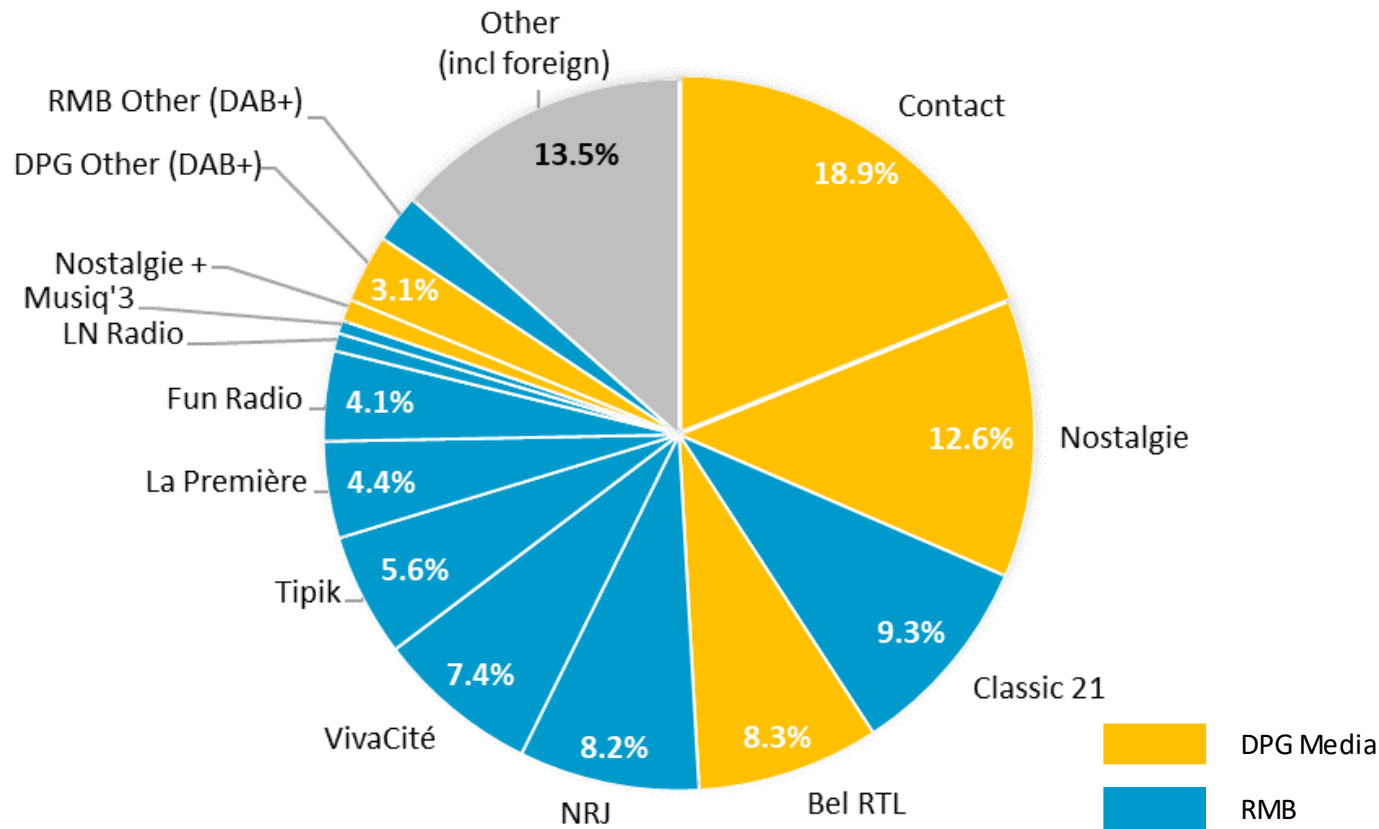
More masculine in the South  
Radio scores well on SG1-4

Growing young listerers  
Radio scores well on SG1-4



# MARKETSHARES 18-54 SOUTH

2023

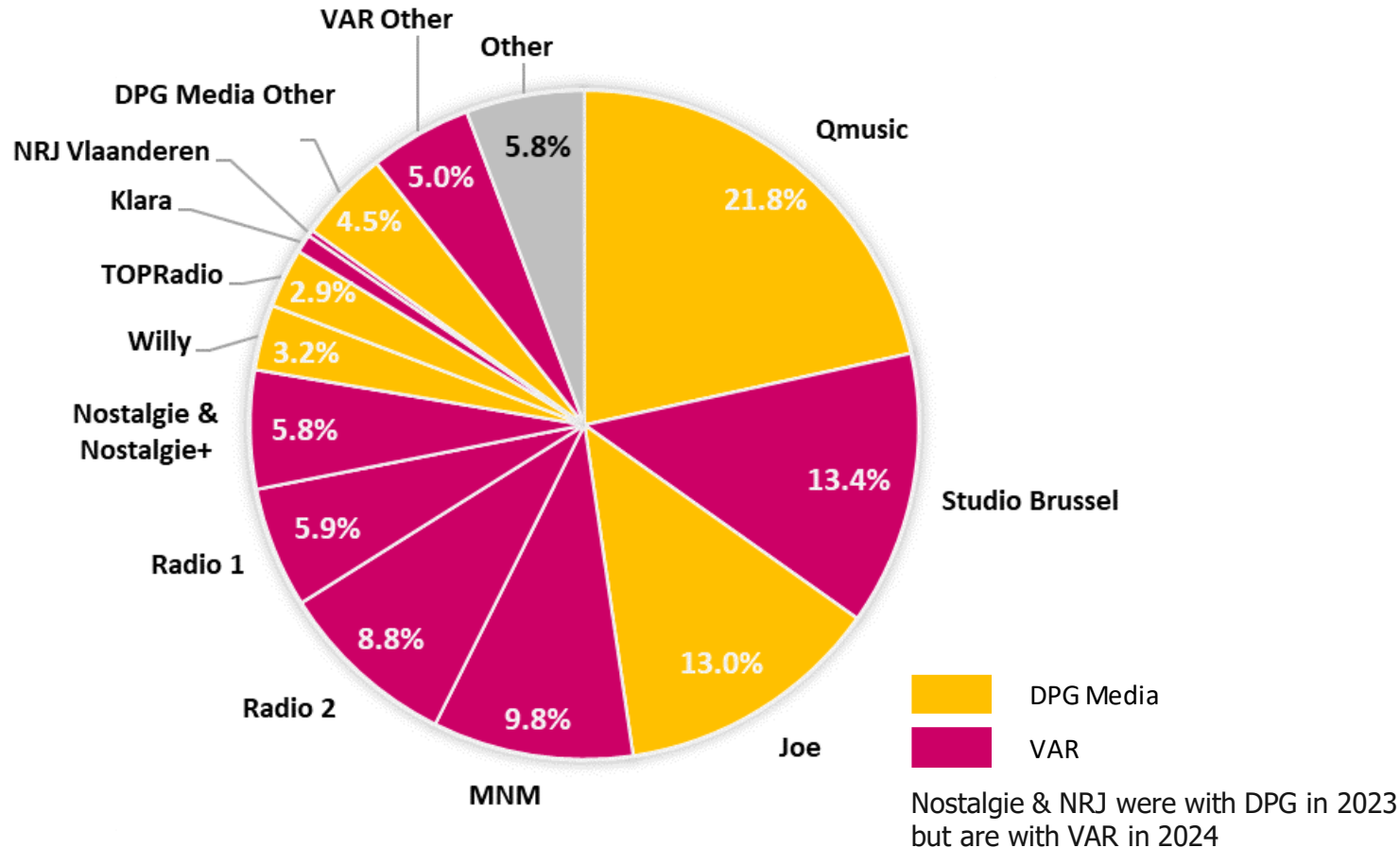


Fun radio was with DPG in 2023 but is with RMB starting 1/4/2024

All year	Evolution 2023 vs 2022
Contact	+ 0.5
Nostalgie	- 1.2
Classic 21	+ 0.4
Bel RTL	+ 0.2
NRJ	- 0.4
VivaCité	- 1.4
Tipik (RTBF)	+ 0.2
La Première	- 0.1
Fun Radio	+ 0.3
LN Radio	- 0.2
Musiq'3	- 0.3
Nostalgie +	- 0.6
DPG Other (DAB+)	+ 0.5
RMB Other (DAB+)	+ 1.0
Other(incl foreign)	+ 1.1

# ▶ MARKETSHARES 18-54 NORTH

2023

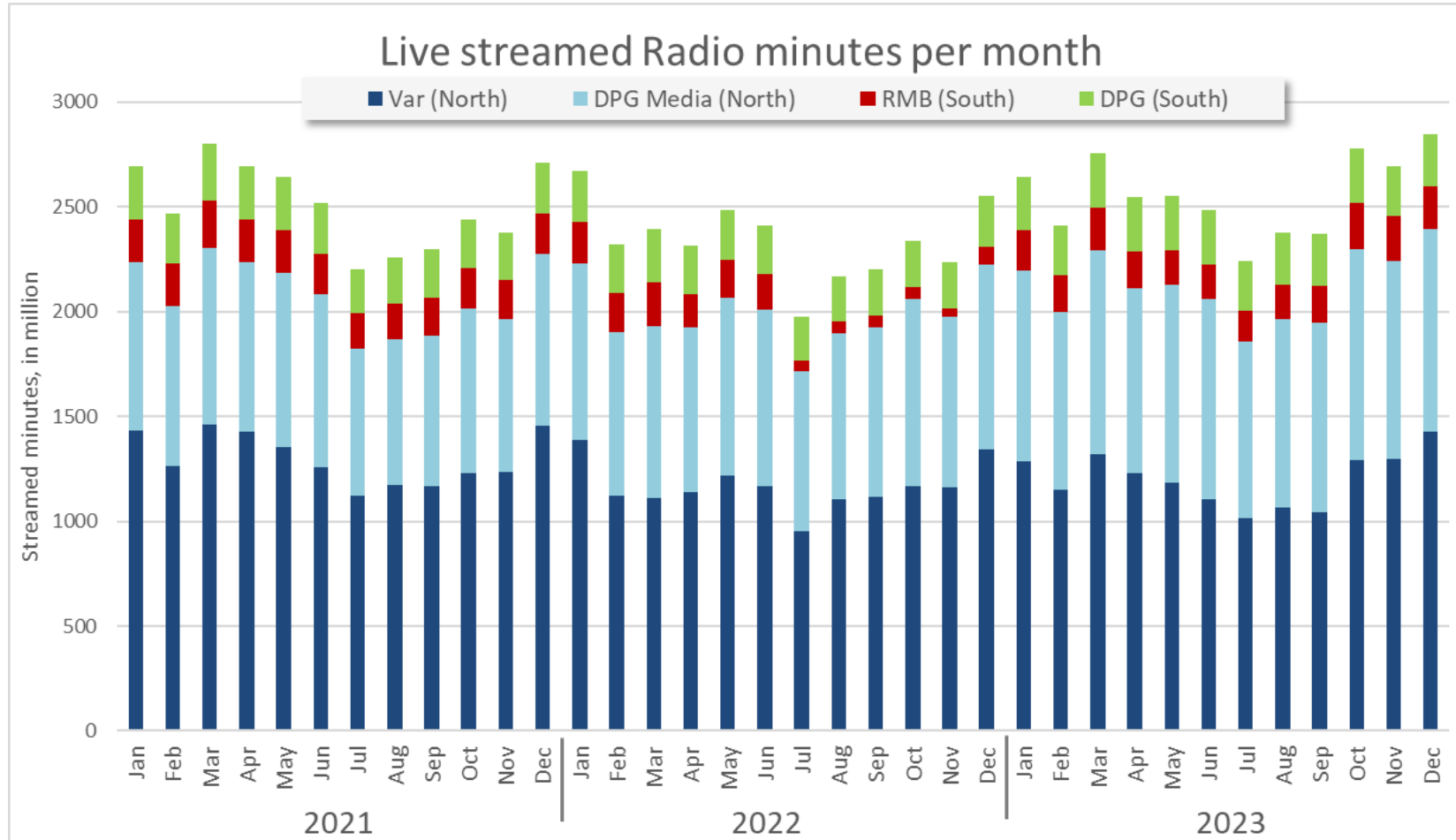


Total year	Evolution 2023 vs 2022
Qmusic	+ 0.0
Studio Brussel	+ 1.2
Joe	+ 0.1
MNM	- 1.7
Radio 2	- 0.5
Radio 1	- 0.3
Nostalgie & Nostalgie+	- 0.8
Willy	+ 1.0
TOPRadio	+ 0.9
Klara	- 0.4
NRJ Vlaanderen	- 0.2
DPG Media other DAB+	+ 0.4
VAR other DAB+	+ 1.8
Other (incl foreign)	- 0.6



# ► STREAMING LIVE RADIO

Driven by demand: more and more channels but the volume remains stable

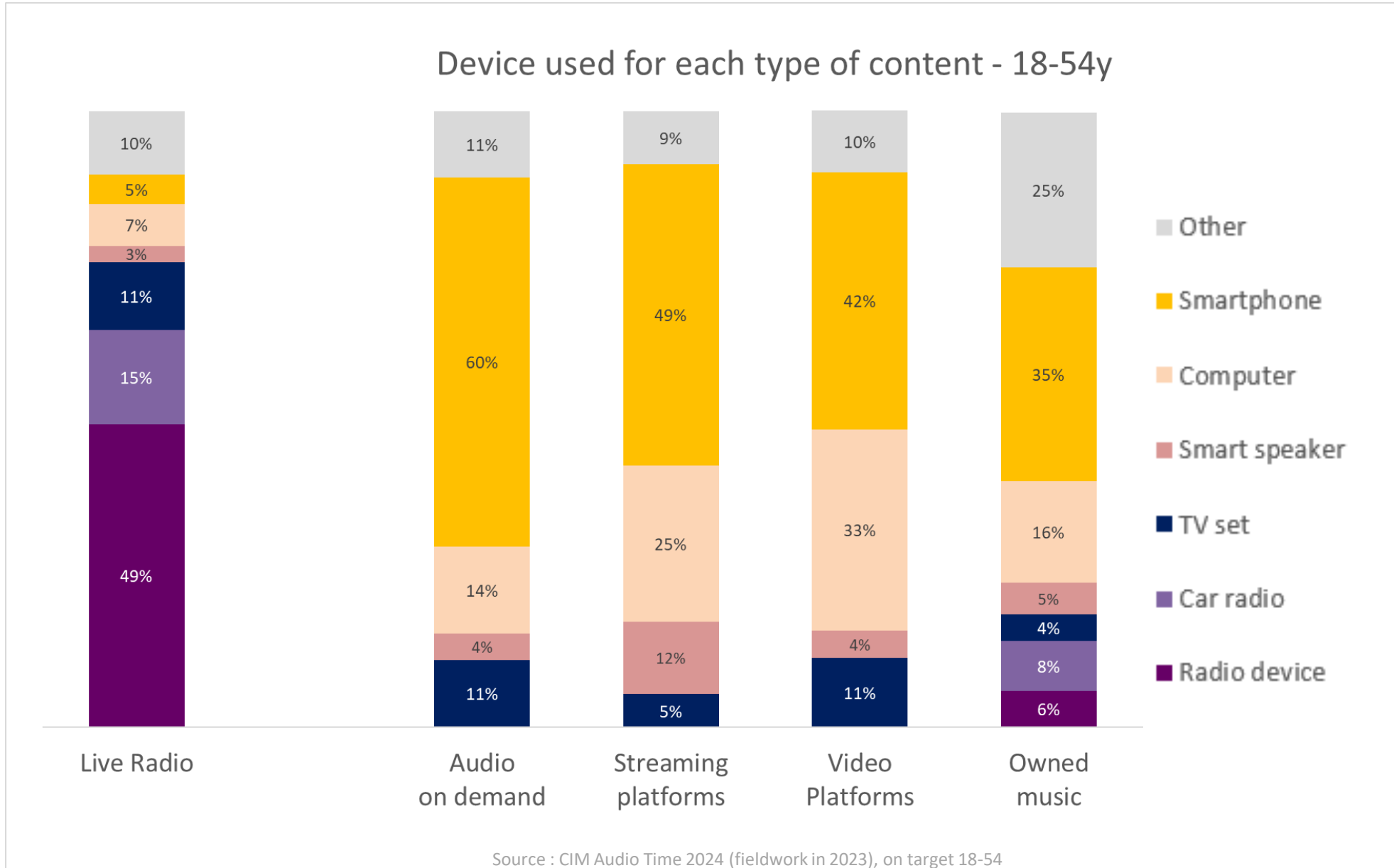


Sales House	Radio Station	#sub-radios	
DPG Media (South)	Bel RTL	11	
	Chérie FM	13	
	Fun Radio Belgique	1	
	Mint	1	
	Nostalgie (FR)	27	
	Radio Contact	10	
RMB (South)	Classic 21 (RTBF)	13	
	jam.	1	
	La Première (RTBF)	2	
	LN Radio	9	
	Musiq'3 (RTBF)	4	
	NRJ	18	
	RTBF MIX	1	
	RTBF Ukraine	1	
	Tarmac	1	
	Tipik (RTBF)	3	
	VivaCité (RTBF)	16	
	DPG Media (North)	Joe	7
		Nostalgie (NL)	9
NRJ Vlaanderen		1	
One World Radio		2	
Qmusic		13	
TOPradio		9	
WILLY		2	
Var (north)	Ketnet Radio (VRT)	1	
	Klara (VRT)	3	
	MNM (VRT)	4	
	Radio 1 (VRT)	3	
	Radio 2 (VRT)	8	
	Studio Brussel (VRT)	7	
	Grand Total	201	

## 4. LISTENING TO OTHER CONTENT

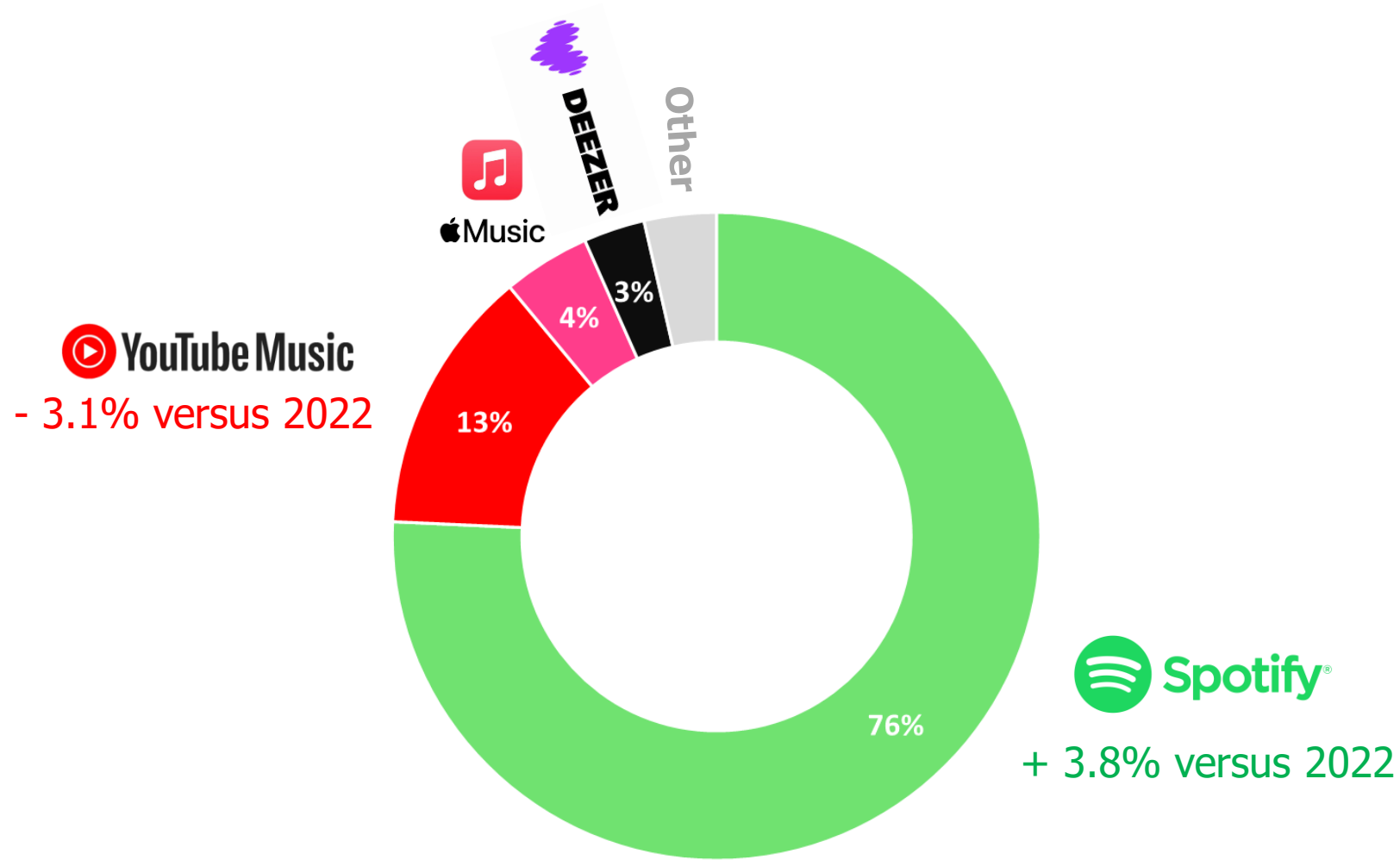


# ▶ WHAT TYPE OF DEVICE IS USED TO LISTEN TO CONTENT (other than radio)



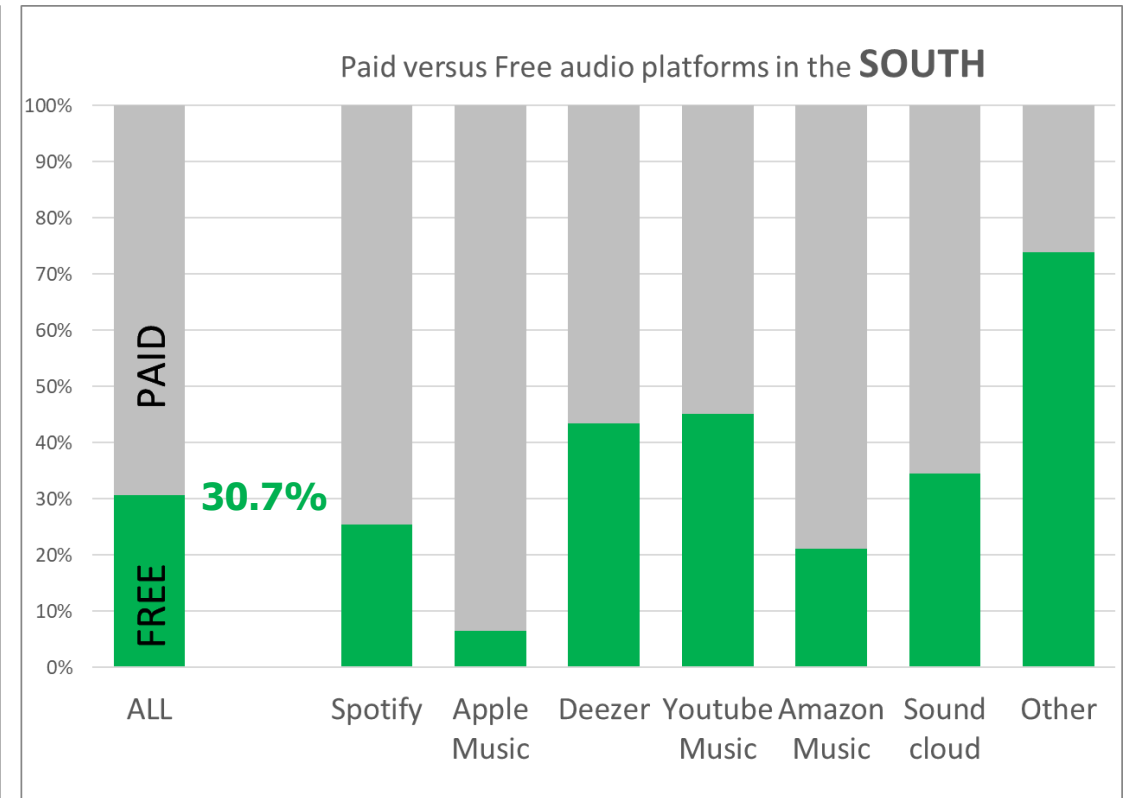
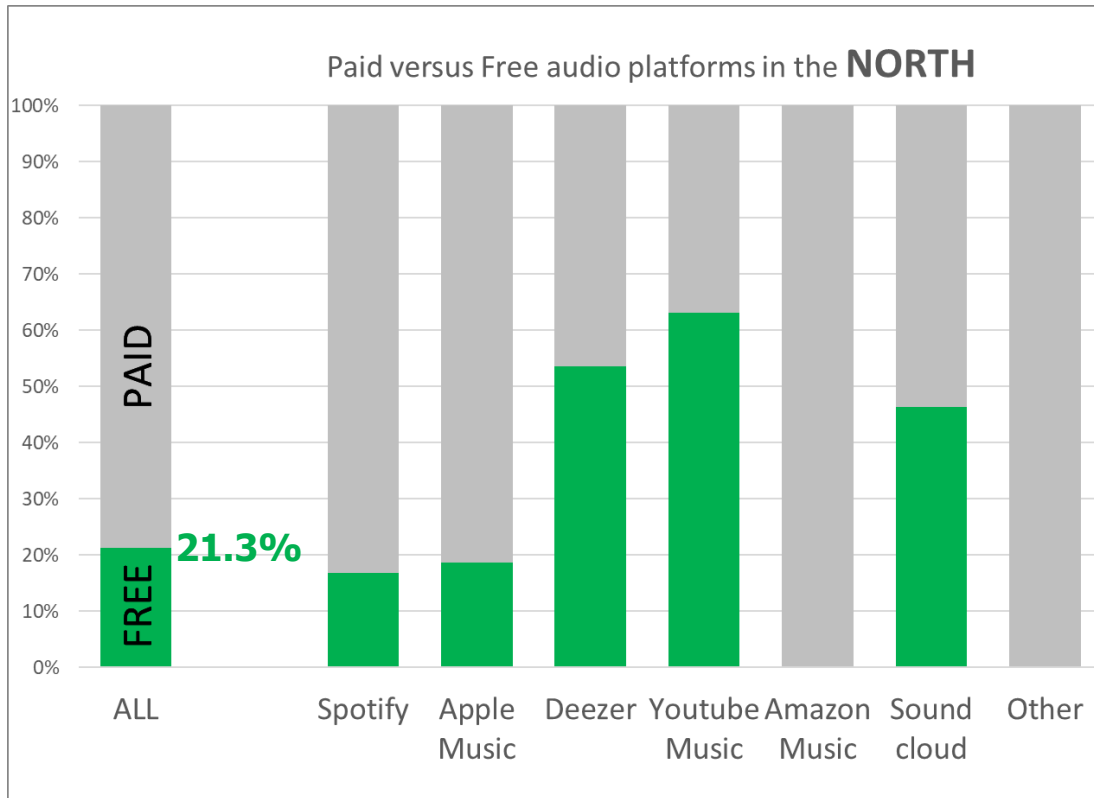


## ▶ STREAMING PLATFORMS (on 18-54)





## ▶ Streaming platforms : FREE versus PAID





# ► The incremental reach potential of streaming platforms (on top of radio) on 18-54y

Hypothesis : the % of **FREE** users versus **PAID** platforms is the same in the category Exclusive platforms versus the category Overlappers

