



Association
of AV Media

RADIO Report 2023

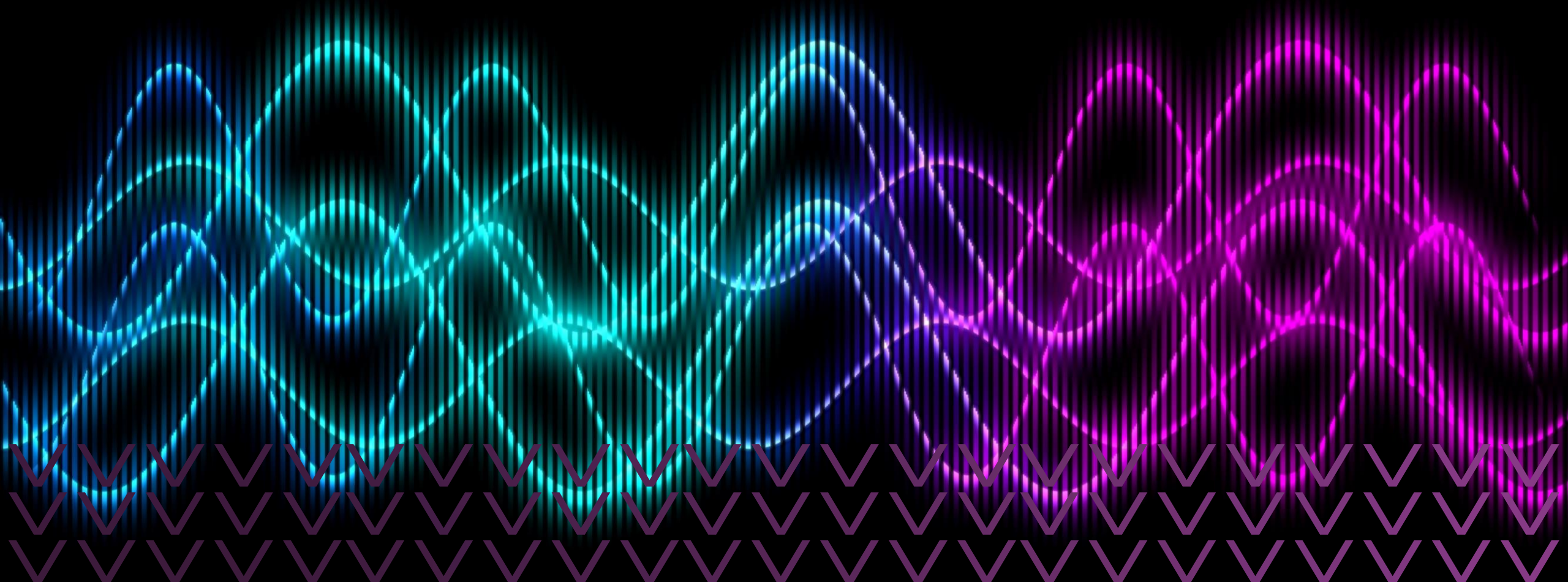


VIA RADIO Report 2023

CONTENTS

1. What is Radio ?
2. Radio Investments
3. Listening to radio (on all devices)
4. Listening to other content





1. WHAT IS RADIO ?

► What is Radio

The “CIM Audio Time” study measures the “share of ear” of the Belgian population and was conducted for the 3rd time in Oct-Dec 2023. It gives an overview of all types of audio that are consumed, their relative importance in volume (and reach) and the devices that are used.

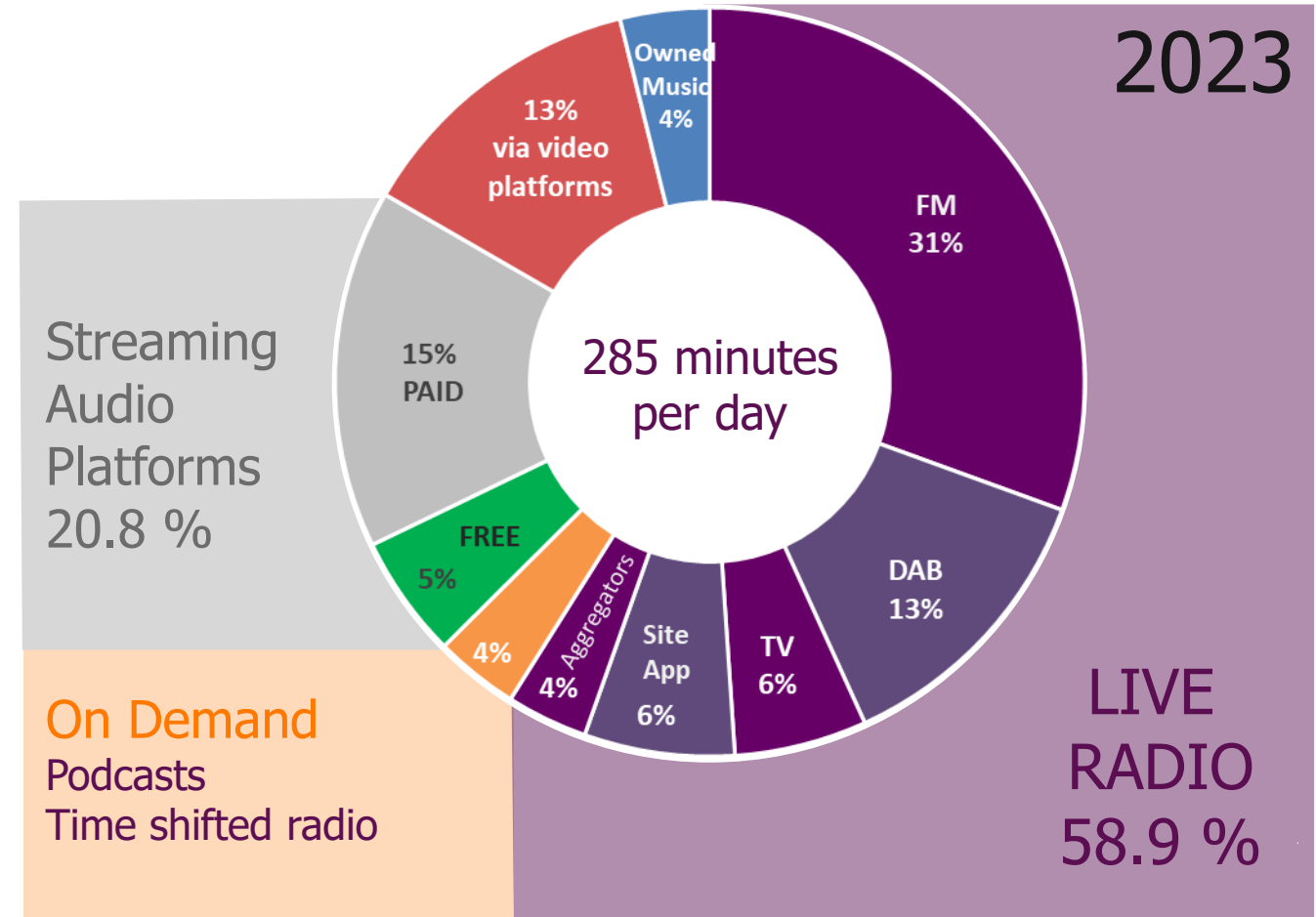
Radio is the biggest source of audio – with Live Radio in the lead and with limited “time shifted radio” – a new mode of consumption that is driven by podcasts.

With the rise of streaming platforms, a new way of audio consumption has emerged. About 25% of these platforms are ad-supported and free to use, while 75% of the volume is paid for to avoid advertising.

Next to the audio platforms, the consumer is using video platforms (like YouTube) to listen to music (for free). And of course there is owned music (records, CD, digital) that completes the picture. Both volumes are not accessible for advertising – the video platforms should be considered as a “video advertising” opportunity.

In total 68% of audio listening on 18-54y can be accessed for advertising purposes.

Live radio is more than 10x the volume of FREE streaming in 18-54y.





► Audio content types in function of age

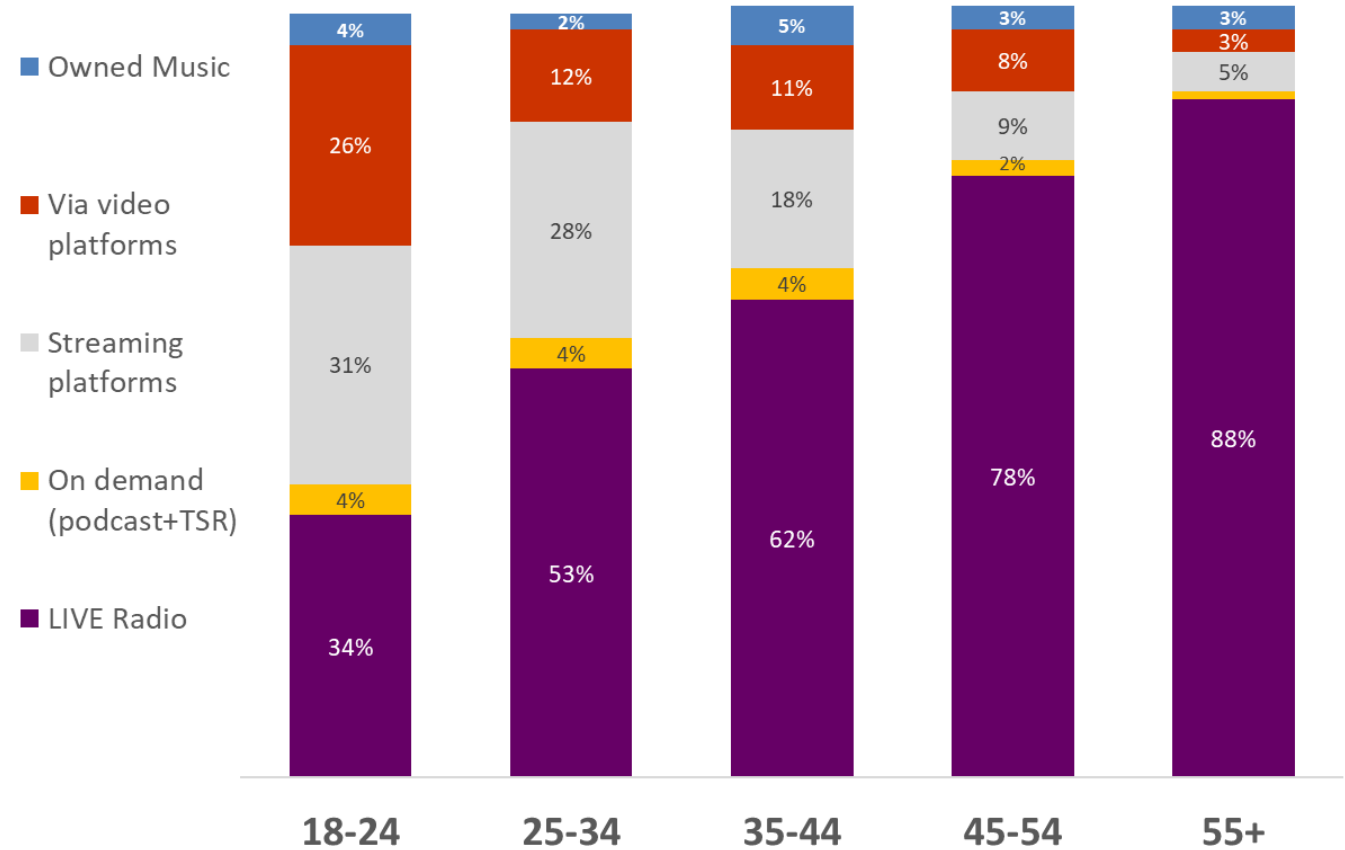
The use of the different audio sources is very dependent on age.

The ageband 18-24y has the lowest radio consumption and relies the most on streaming audio platforms and on video platforms. But even in this youngest ageband it is radio that is most consumed.

When age goes up, streaming and video platforms go down and radio becomes dominant.

Starting 35+, radio is already half of all audio consumption and streaming platforms (audio & video) drop significantly.

Live Radio is leading in every age band





3. RADIO INVESTMENTS



► Key figures

In this comparison we have included all sectors, also those with a lot of exchange like Media. The available tools don't show 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.

The number of advertisers & brands that use radio is still behind the pre-pandemic situation and remained stable in 2023 versus 2022.

The number of spots has increased in 2023 in the North but we see a decline in GRP (1% of the target) - resulting in a lower GRP per spot.

In the South there is a decline in number of spots and GRP. As the decline in audience was bigger, the GRP per spot is also lower in 2023 compared to previous years.

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

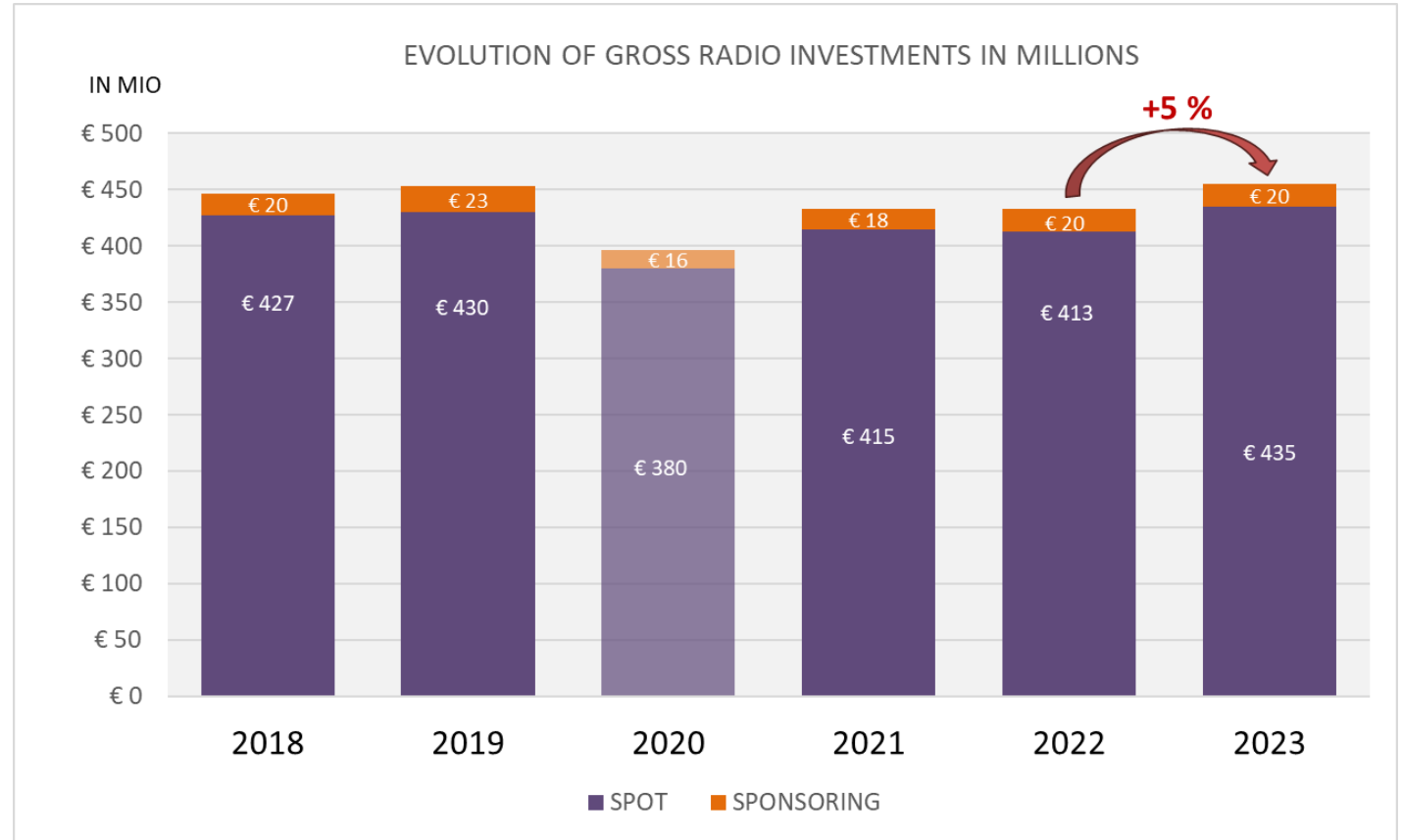
In Belgium, we only dispose of gross investments concerning media activities of advertisers. For radio this equals the rate card value of each spot or billboard that has been broadcasted. These investments do not reflect the actual amount that is paid, but it does allow to follow evolutions over time, to compare different advertisers or to analyze specific sectors.

Investment for online radio (only available in 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 grown again in 2023 with 5% to 455 million euro gross.

This brings the investment back to the pre-pandemic level – but of course we need to take into account inflation.



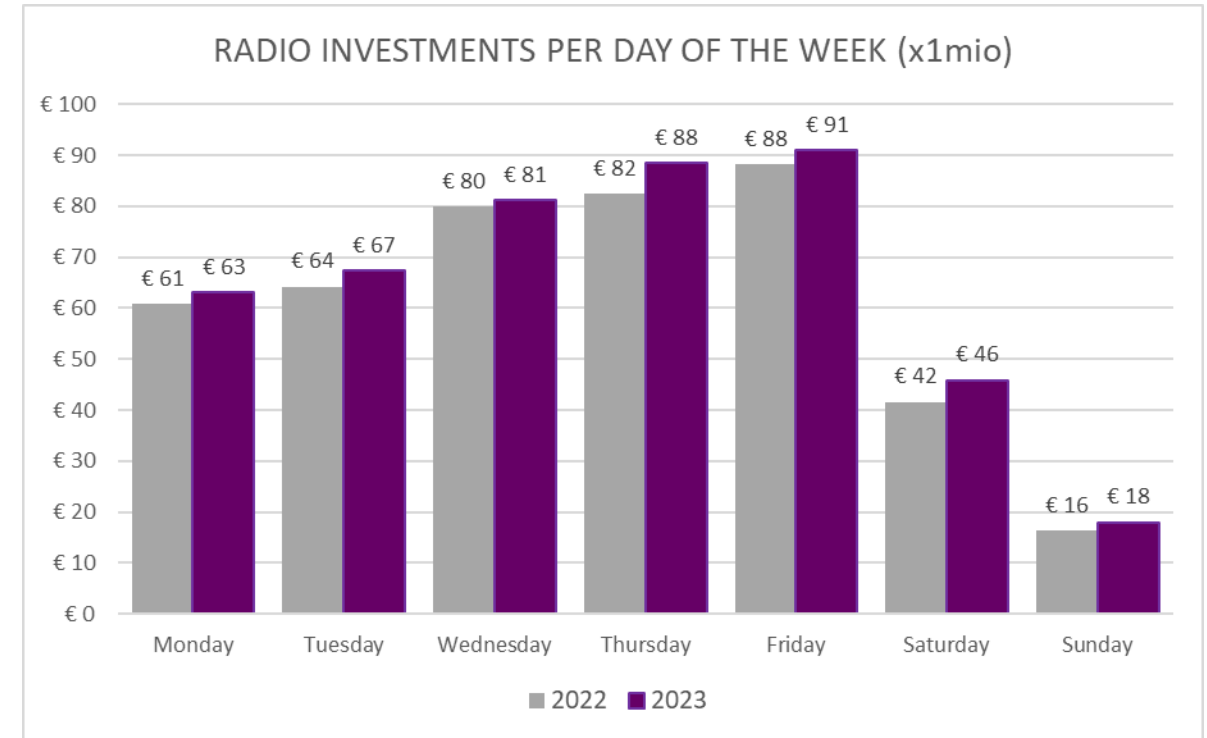
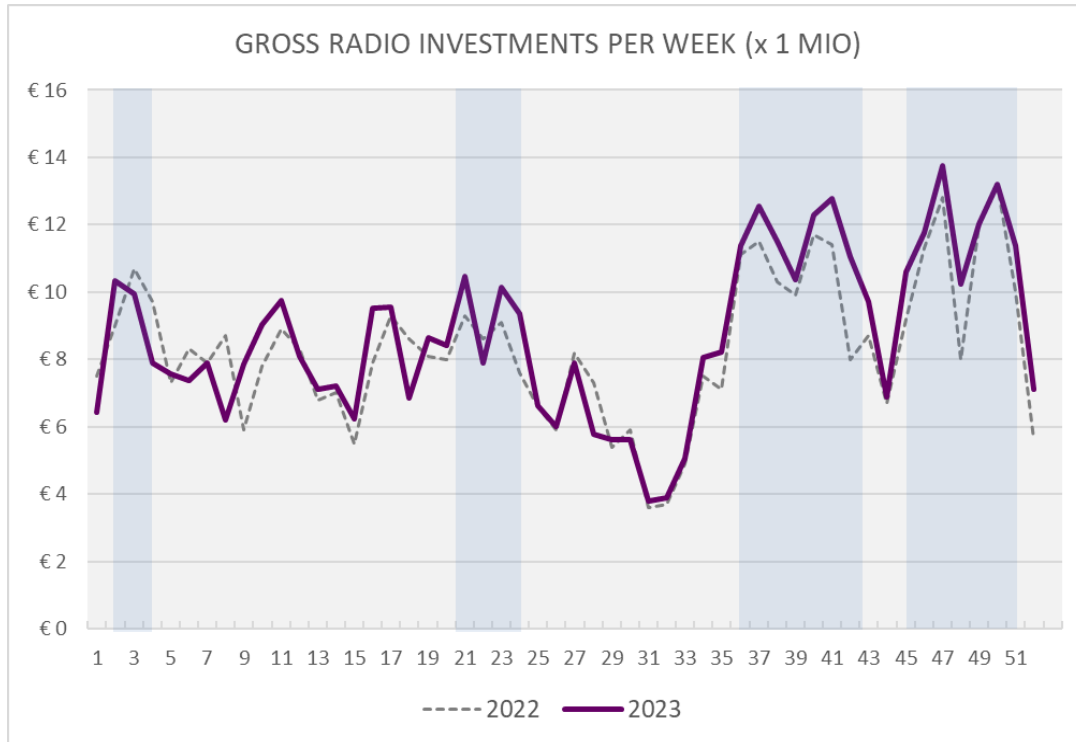
Source: Nielsen MDB – National. Excluded: (Associated) Manifestations/Shows, Fairs, Media/Publishers



► 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 campaigns tend to be short the variations between weeks can be quite high. There is little variation in seasonality in 2023 compared to 2022. 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. Despite good audience levels advertising in the weekend remains low.



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



► Gross Radio investments by economic group

The sector Distribution dominates radio advertising and has grown in importance over the years. Radio being perceived as a proximity and call-to-action media, it is not surprising to see this sector in first position.

The share of 40% of total investments was consolidated in 2023 and was an important driver of overall growth.

Transport – the car sector – had a good year in 2023 and shows the biggest growth (together with Energy) but is still behind pre-pandemic levels.

The Energy sector recovered after a difficult 2022.

On the downside, we see a continuous decline of the services sector that includes finance and government.

	Economical group (in mio)	2019	2020	2021	2022	2023	index vs 2022
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
	TOTAL	€ 453	€ 396	€ 433	€ 434	€ 455	105

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

► Gross Radio investments – top 25 by advertisers

In this ranking we see the top 8 increasing their spend versus 2022. The supermarket chains take the lead with Aldi and Colruyt in first positions, and also Delhaize recovered after a drop in 2022. Also telecom brands Proximus and Orange showed continuous growth over the last years.

Special attention goes to « come back kid » D'Ieteren who was first in the rank in 2019 but declined since then and was not even present in the top 25 last year. With a growth of index 258 it takes place at position 8.

Non-food distribution had a more difficult year, with limited growth for AS Watson (AS Adventure), Brico and Distripar (parfumes) while Krijnen (kitchens), Krefel and Mediamarkt declined.

Other notable risers are Bol.com (index 143), Bebat (index 127) and SNCB/NMBS (index 123).

Overall the top 25 takes 41% of all investments into account.

	Advertiser (in mio)	2021	2022	2023	index vs 2022
1	ALDI	€ 15.4	€ 17.0	€ 18.6	109
2	COLRUYT	€ 13.8	€ 14.1	€ 17.3	123
3	LOTERIE NATIONALE	€ 14.6	€ 13.6	€ 15.6	114
4	PROXIMUS	€ 7.9	€ 8.8	€ 11.1	126
5	DELHAIZE	€ 8.6	€ 7.3	€ 10.4	142
6	ORANGE	€ 7.2	€ 8.0	€ 9.2	114
7	D'IETEREN AUTO	€ 6.4	€ 3.3	€ 8.6	258
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
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
14	BNP PARIBAS FORTIS	€ 6.7	€ 8.2	€ 5.5	67
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
19	SUNWEB VAKANTIES	€ 2.3	€ 3.6	€ 4.3	120
20	SNCB/NMBS	€ 1.2	€ 3.5	€ 4.3	123
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
	TOTAL	€ 160	€ 172	€ 185	107
	Top 25 : % of total spend	37%	40%	41%	



3. 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 the problems it generated in the face-to-face fieldwork, the publications did not follow that rhythm 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 – analog or digital, on all devices, and on all places.

As more and more streaming radio stations emerge, and on demand radio is starting to take up, a separate initiative was launched to cover this online listening based on the first party data of the radio stations. Today, only the live part is covered but the goal is to expand this in the future. This study is a complement of the diary study and it does not detect extra listening. It just documents the long tail of radio channels.

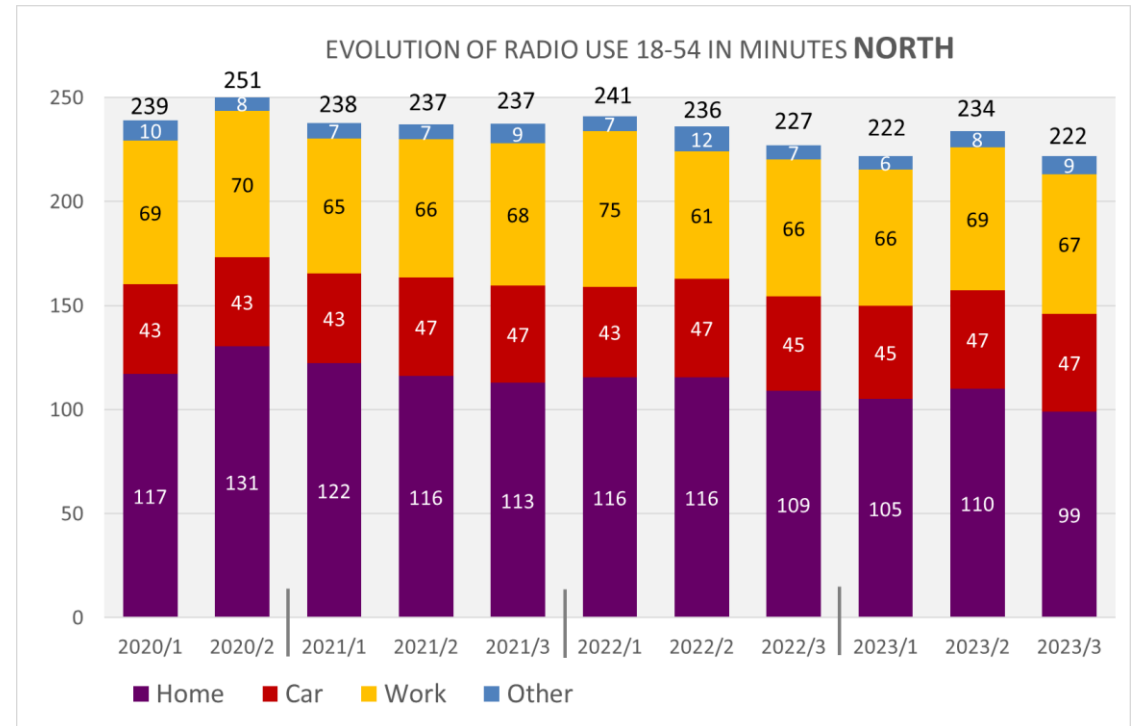
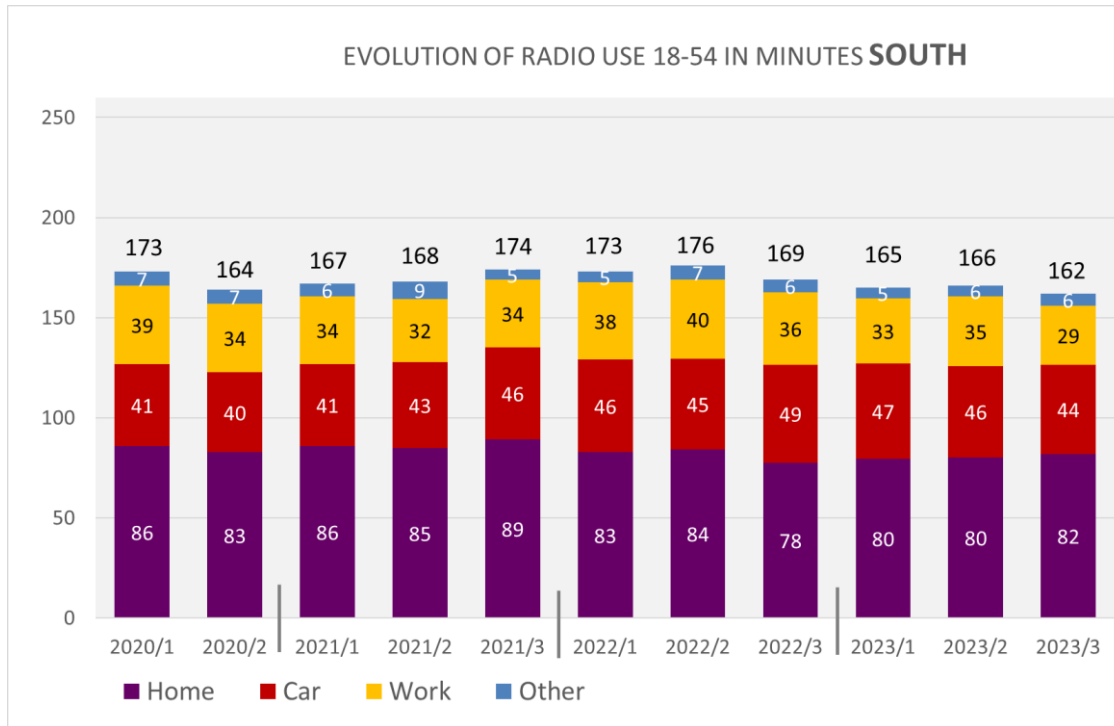
Published wave	Months
2019/1	Jan-Apr
2019/2	May-Aug
2019/3	Sep-Dec
2020/1	Jan-Jun
2020/2	Sep-Feb
2021/1	Mar-Jun
2021/2	May-Aug
2021/3	Sep-Dec
2022/1	Jan-Apr
2022/2	May-Aug
2022/3	Sep-Dec
2023/1	Jan-Apr
2023/2	May-Aug
2023/3	Sep-Dec



► EVOLUTION OF RADIO LISTENING (WITH SPLIT BY LOCATION)

The consumption of radio has always been lower in the South versus the North. It are both inhome and listening at work that make the difference. Inhome radio is antagonist to TV – people watch a lot more TV during the day in the South. The higher level at work in the North is historical but has probably also to do with the high KMO penetration. Car listening is very similar in both regions.

The evolutions in time are not spectacular and we see variations per wave that can be linked to the sample size. When taking the 3 waves of 2023 together and compared to 2022, the South declined from 173 to 164 minutes, while in the North, the average of 2023 was 226 minutes versus 235 in 2022.

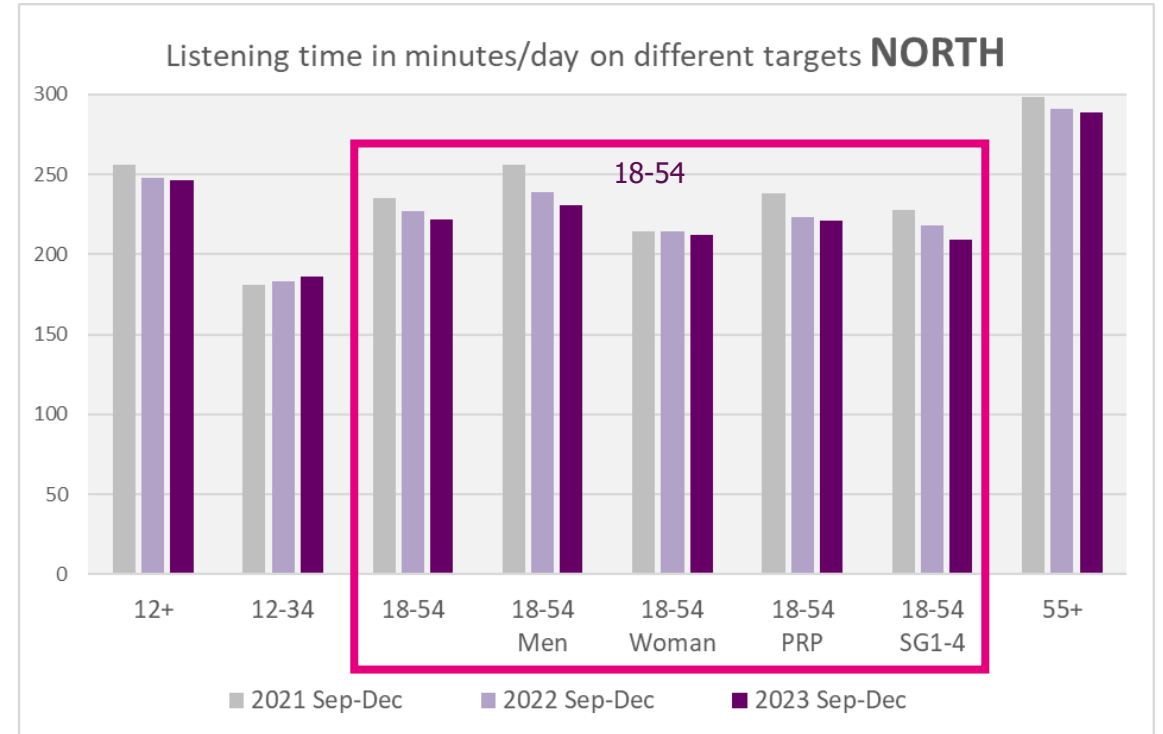
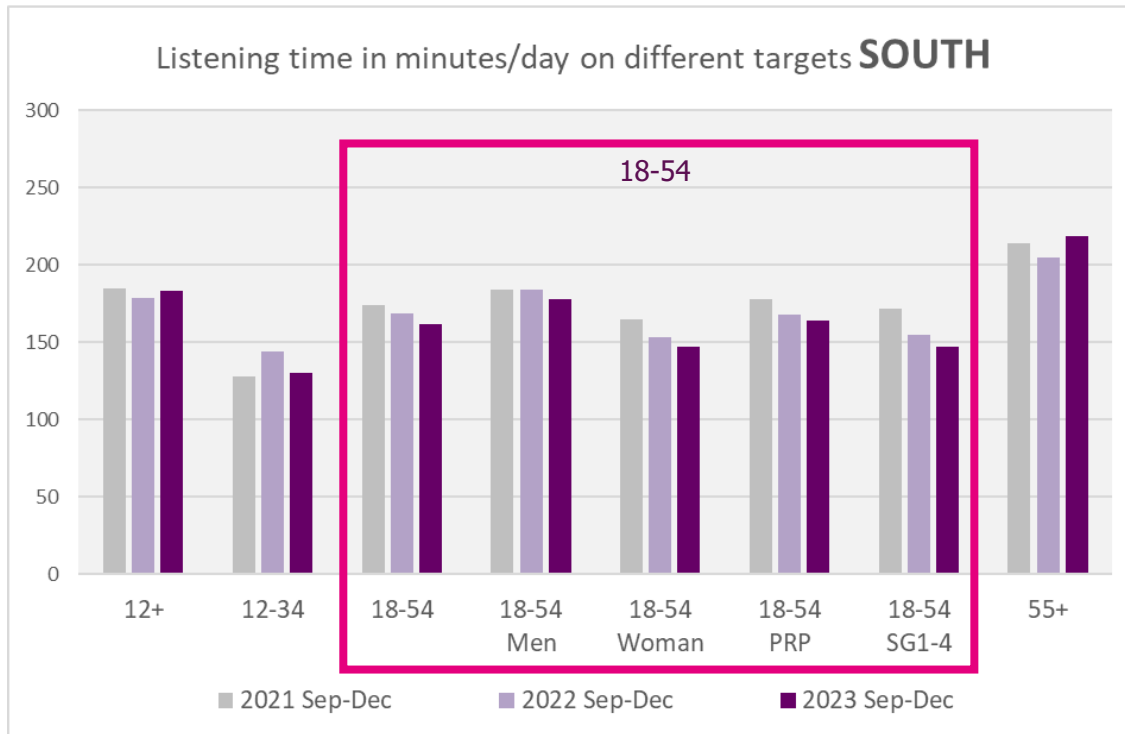




▶ TIME RADIO LISTENING PER TARGET

We have compared the last 3 years and have done this on the last wave of each year. The last wave of 2023 was in decline in both North and South. Overall the differences in average listening time among the different target groups are rather small. Men have higher listening volumes than women and upper social groups hold strong.

It is notable to see the relative high volumes of radio listening in the younger age groups. In the South the average is more than 2 hours, while in the North it rises to more than 3 hours a day !





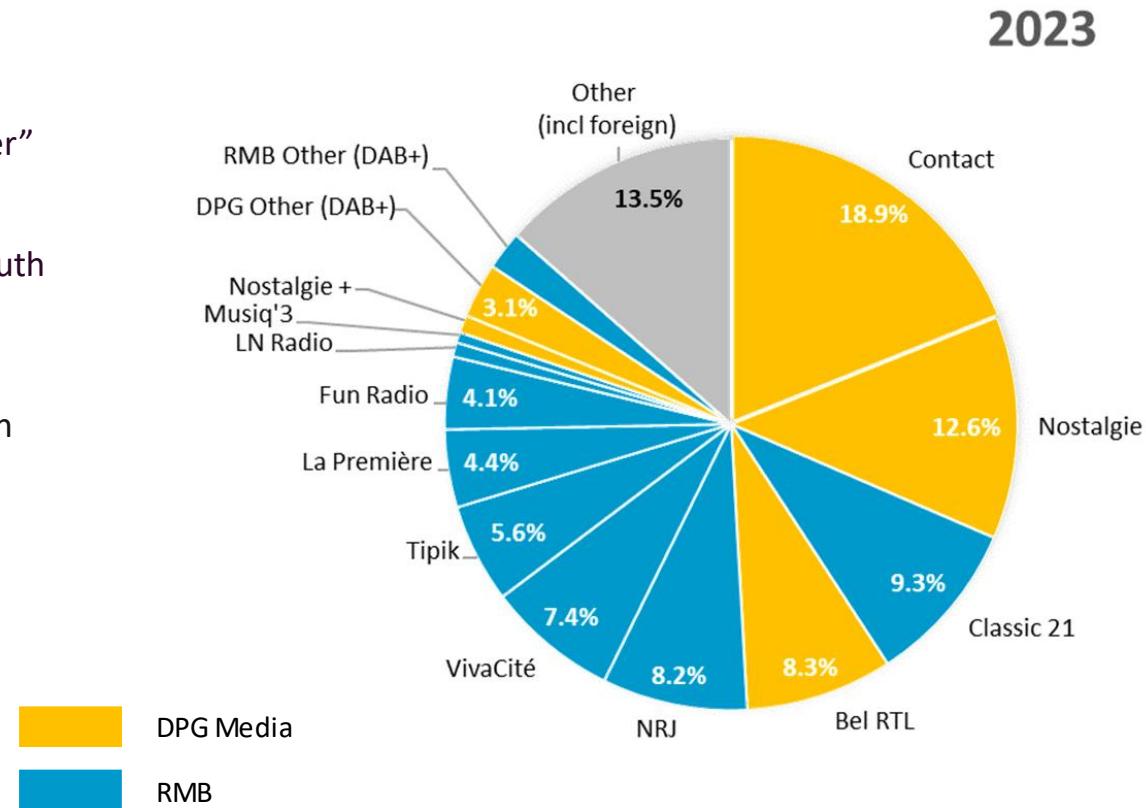
▶ MARKETSHARES 18-54 SOUTH

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 a consequence: some stations with high listening volumes in older age groups may come out less performant.

Contact is market leader on 18-54 and has even strengthened its position in 2023. Also Classic 21, Bel RTL and Fun Radio showed good progress.

All channels that have less than 1% marketshare (in 2023) are grouped in “other” and we did this by saleshouse. Next to this there are smaller, regional and especially foreign radio stations – in the South there is a lot of listening to French radio.

Overall the saleshouse RMB (blue) remains market leader. Note that Fun radio was with DPG in 2023 but is with RMB starting 1/4/2024 – so we gave it the blue colour.



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

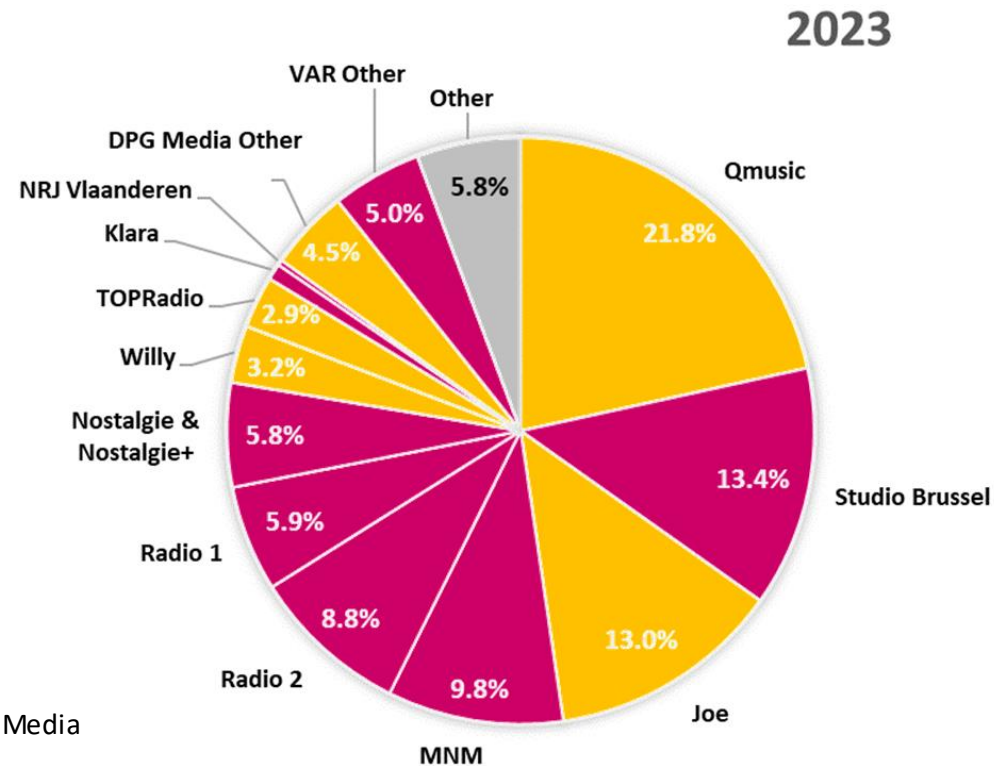
In radio, every station has a specific profile. When producing marketshares we need to choose a target and that is 18-54 in this report. This has a consequence: some stations with high listening volumes in older age groups may come out less performant.

Qmusic is market leader on 18-54. Studio Brussel Willy and Topradio showed the highest growth.

The long tail with “other radio” (all stations below 1% marketshare) that we have splitted into the 2 saleshouses is more important in the North.

On the other hand, there is less listening to small regional and foreign stations.

Overall VRT (red) and DPG Media (orange) have a comparable share – it all depends where to classify Nostalgie and NRJ that were with DPG in 2023 but are with VAR in 2024 – so we gave it a red colour in this overview.



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



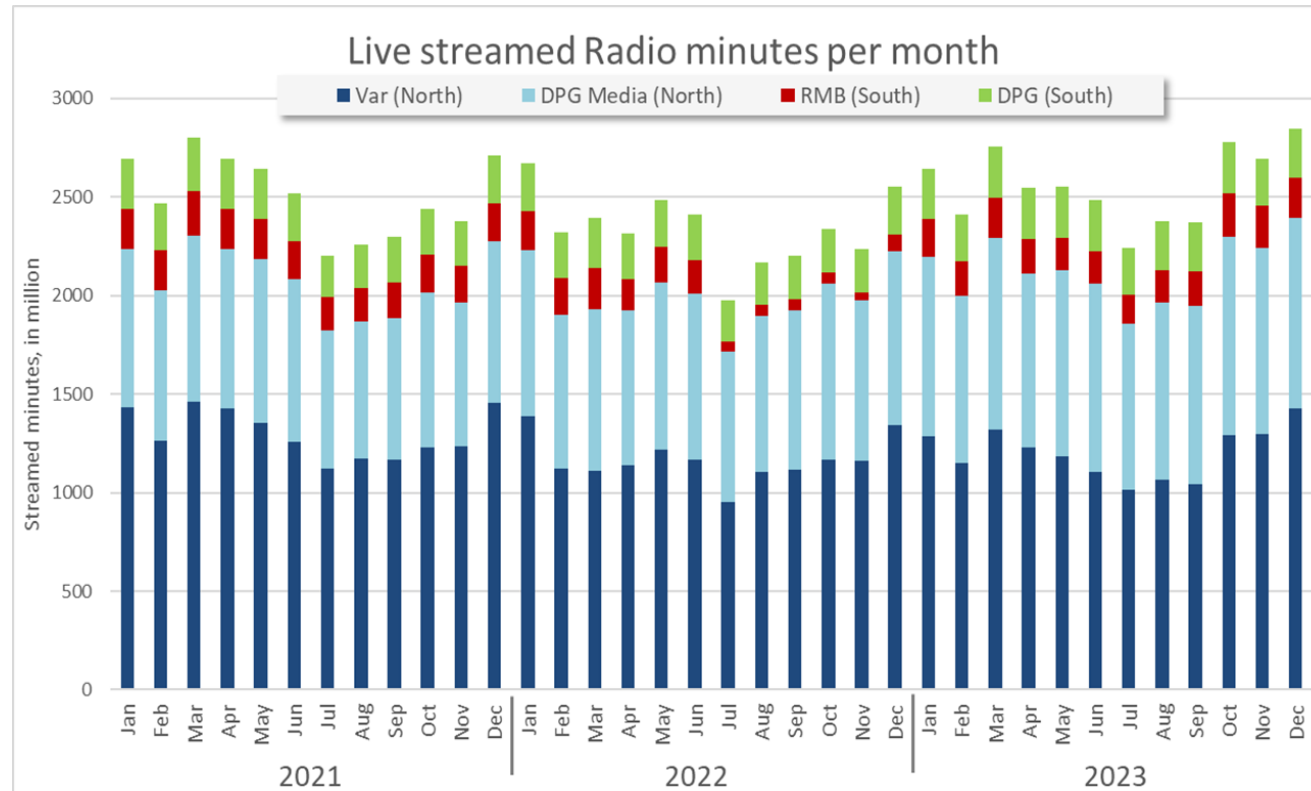
► STREAMING RADIO

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	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



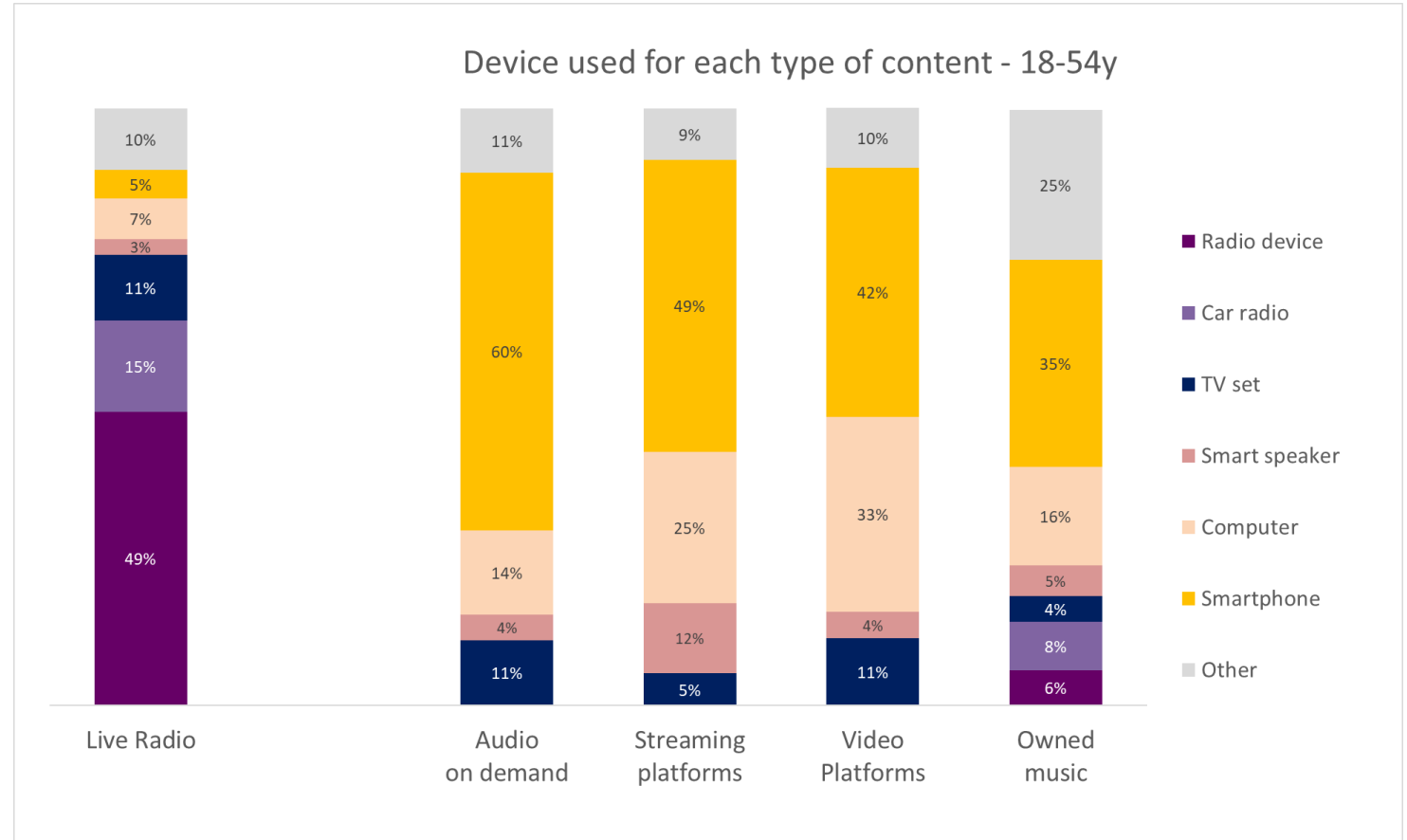
▶ WHAT TYPE OF DEVICE IS USED TO LISTEN TO CONTENT IN 2023

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 platforms, this is 50% or more 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 of non-radio content. It is however not clear if this is as a (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.



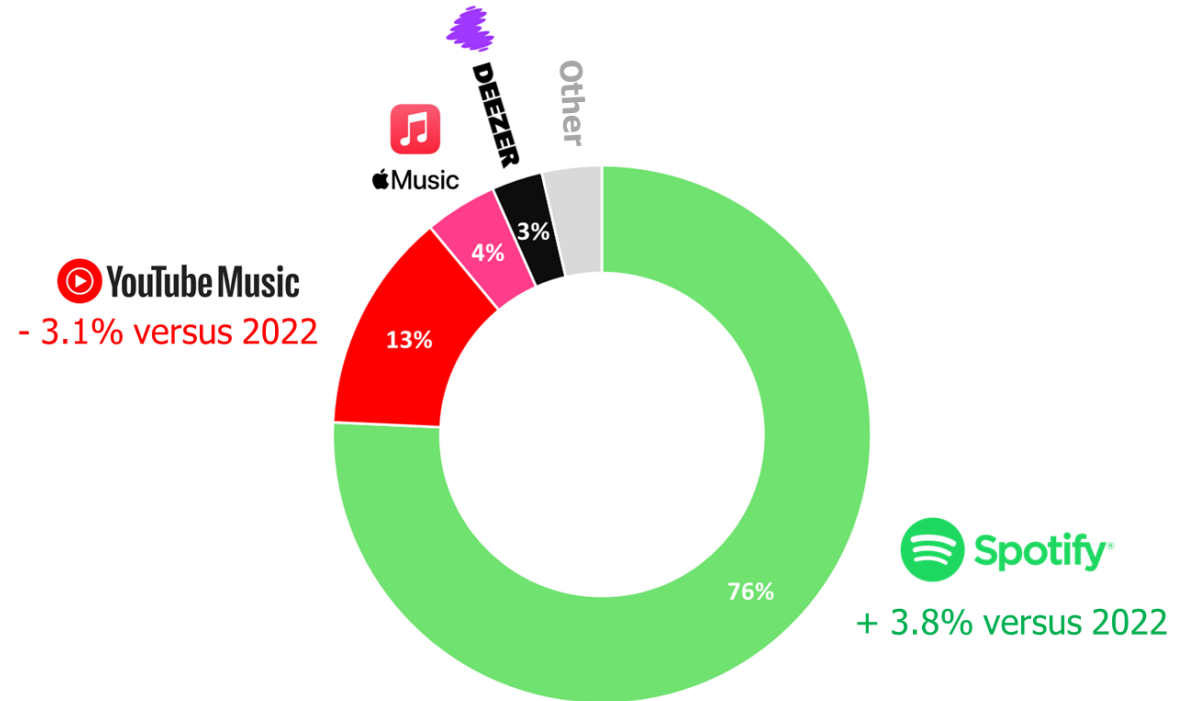


► STREAMING PLATFORMS ON 18-54y in 2023

CIM Audio Time has also asked about the brands of music streaming platforms that people use (for free, or paid 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. It has even gained importance in 2023.

YouTube music, Apple music and Deezer take a quarter of the volume, and are more present in the South. The rise of Spotify is especially to the detriment of YouTube Music (not to be mistaken with YouTube video).



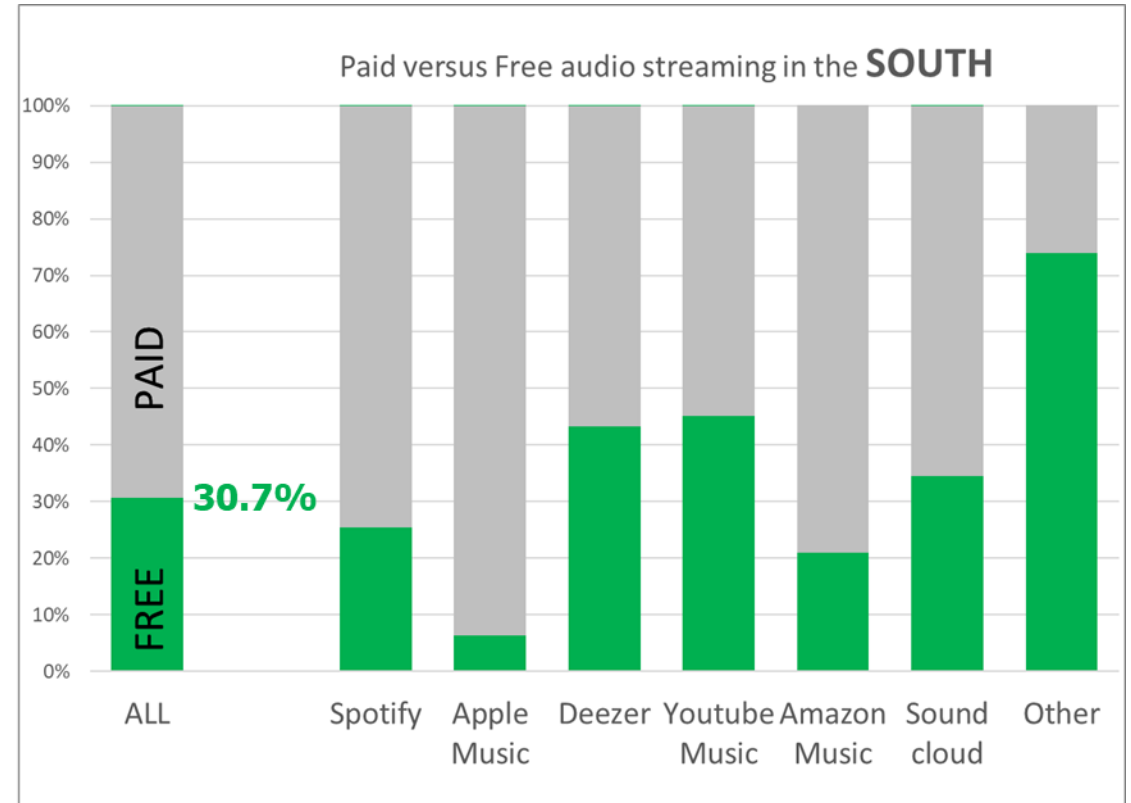
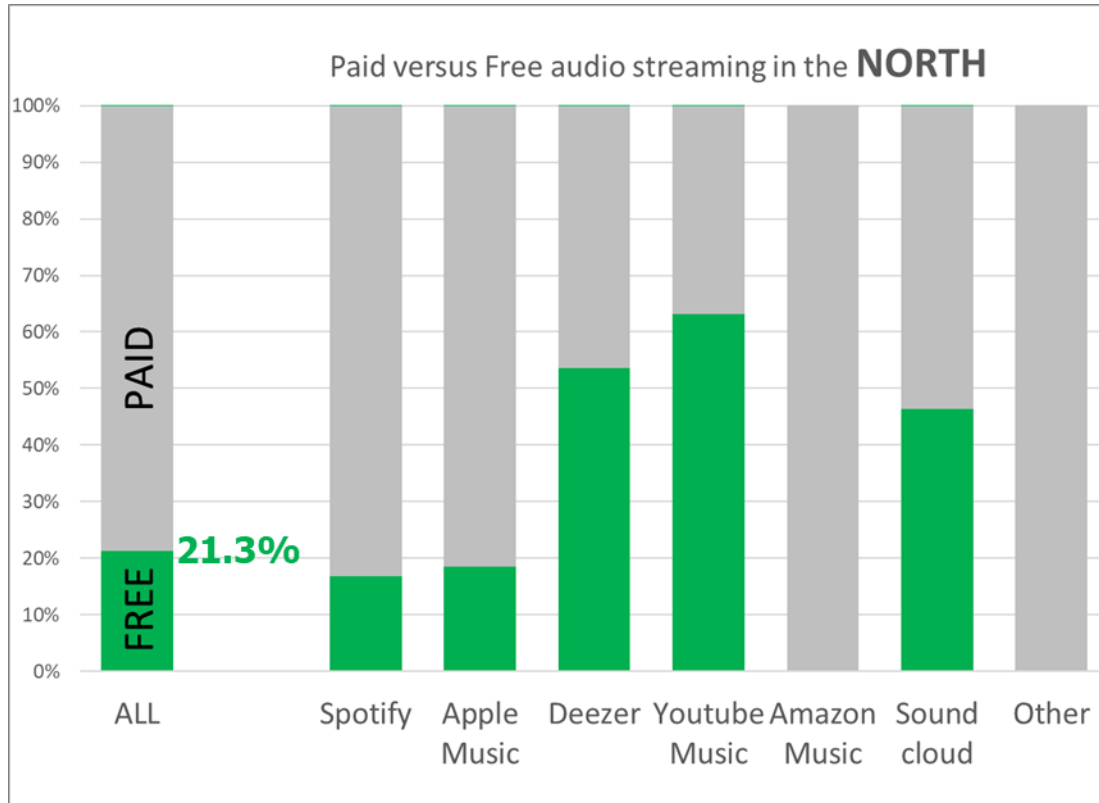


► Streaming platforms : FREE versus PAID on 18-54y in 2023

When discussing the merites of the streaming platforms for advertising we need to separete the users that listen for free and accept advertising versus those who pay to avoid advertising.

Overall about 21% in the North are free users, versus 31% in the South. Note that this level is lower for market leader Spotify in both markets.

When calculating the extra reach that streaming platforms can add to a radio plan, one should take only the FREE part into account. This is however a specific and complex analyses. A standard devide between both types of use could help a lot to better disclose the merites.

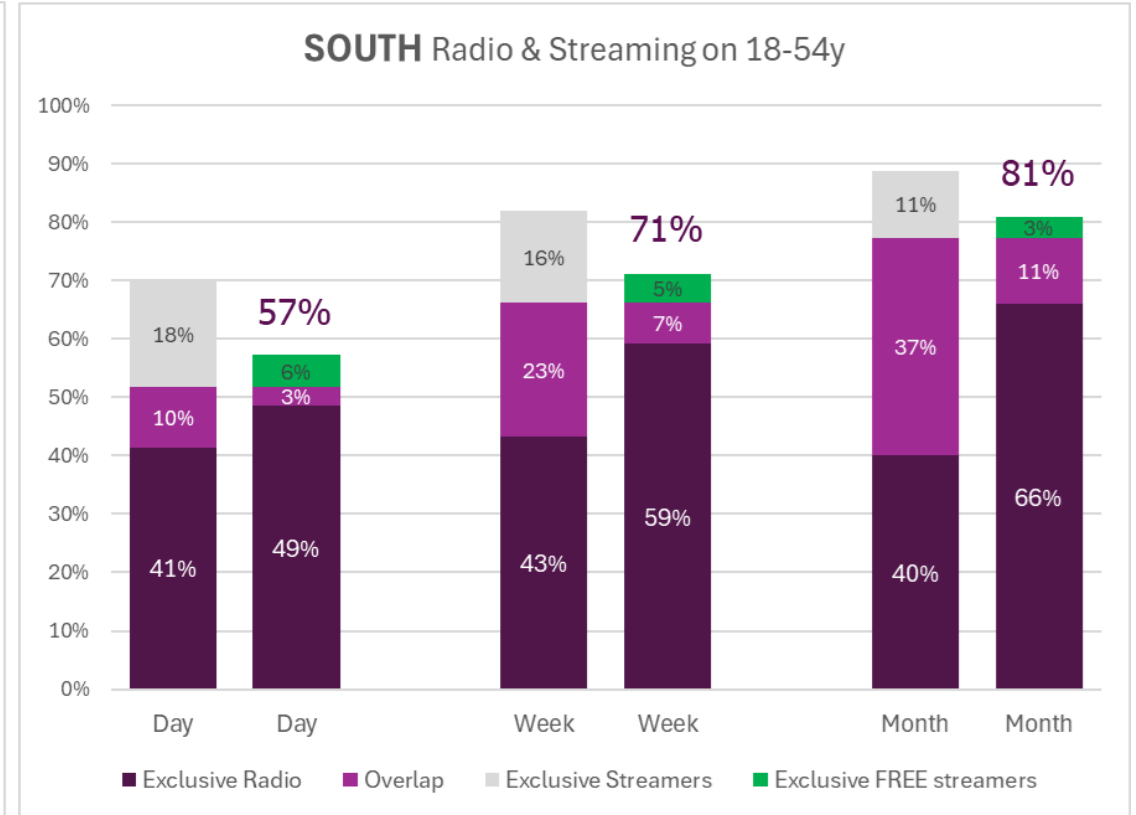
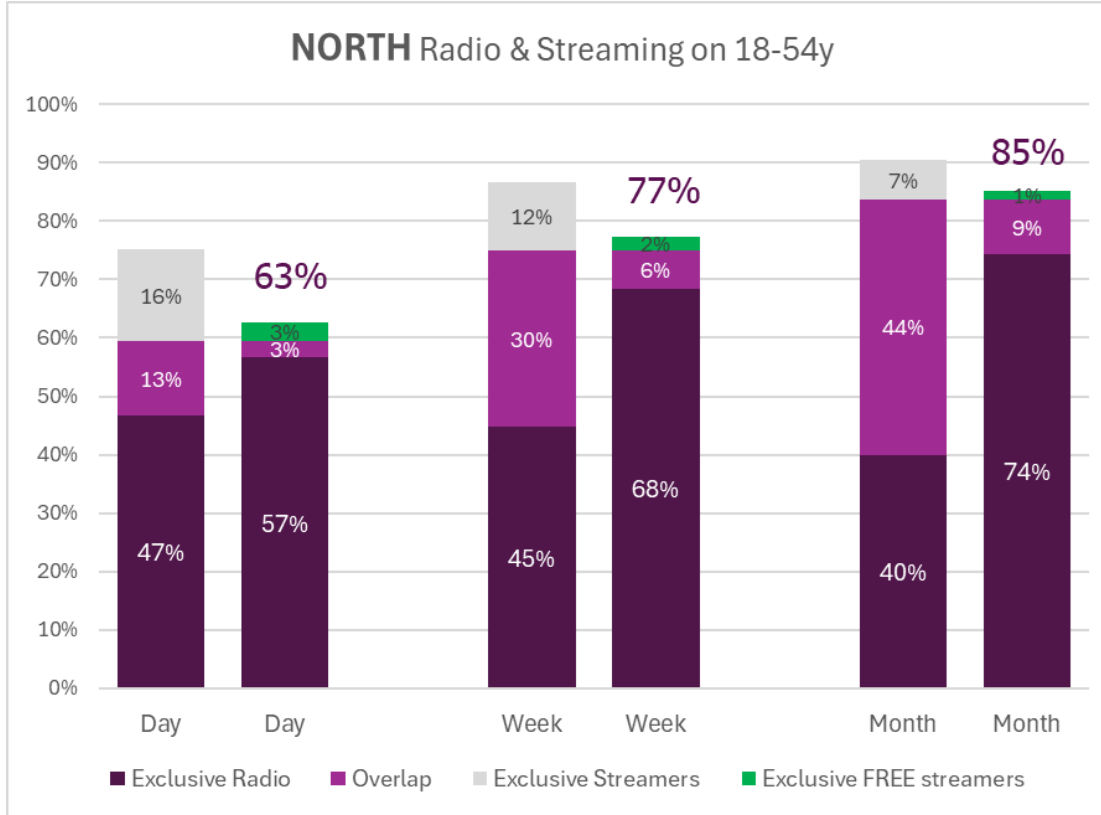




► The incremental reach potential of streaming platforms (on top of radio) on 18-54y

CIM Audiotime allows to calculate the daily / weekly / monthly reach that radio and streaming platforms can have, and it is also possible to calculate the overlap of people that use both in that timeframe (with a special thanks to “Seen from Space” who did this analyses first). We have taken this analyses one step further and have crossed the information on the split FREE versus PAID.

The hypothesis used is that the % of FREE users versus PAID platforms is the same in the category Exclusive platforms versus the category Overlappers. If this would be true, the exclusive reach of radio is much higher, and the incremental reach of streaming platforms is limited. Yes, this will rise on younger age groups. But we also believe that our hypothesis is even overestimating as FREE users of platforms might be more than expected also radio listeners.



VIA RADIO Report 2023

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Association
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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



Ads & Data



 **transfer**

