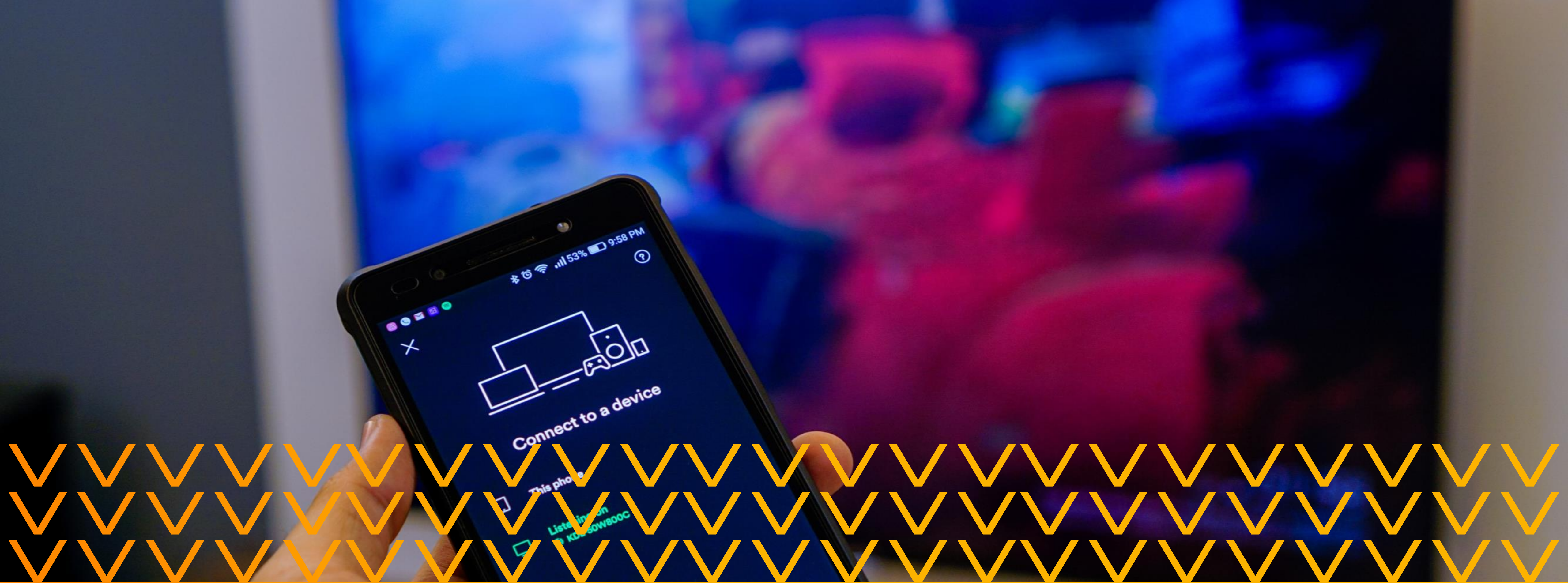
Association of AV Media

TV Report 2023

VIA **TV Report 2023**

CONTENT



1. WHAT IS TV ?

WHAT IS TV ?

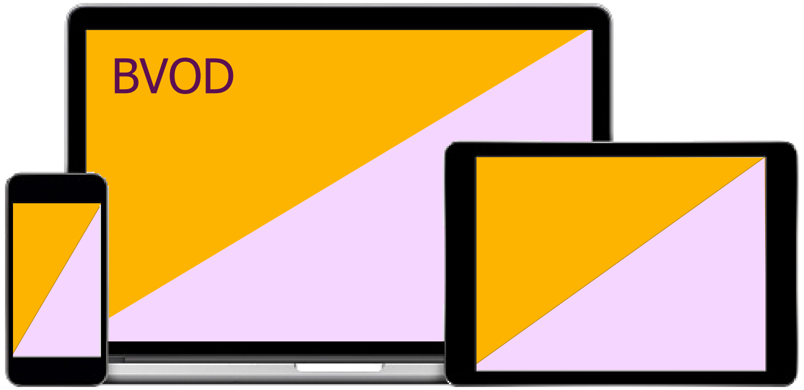
Not so long ago "watching the TV screen" was the equivalent of "watching TV channels". Today this concept is blurred. The TV-screen has actually become a digital screen like any other, with connectivity similar to a computer (HDMI, WiFi, LAN, USB). Today, 59% of all people declare to have a "smart TV" and 20% has a chromecast (source: CIM ES 2023).

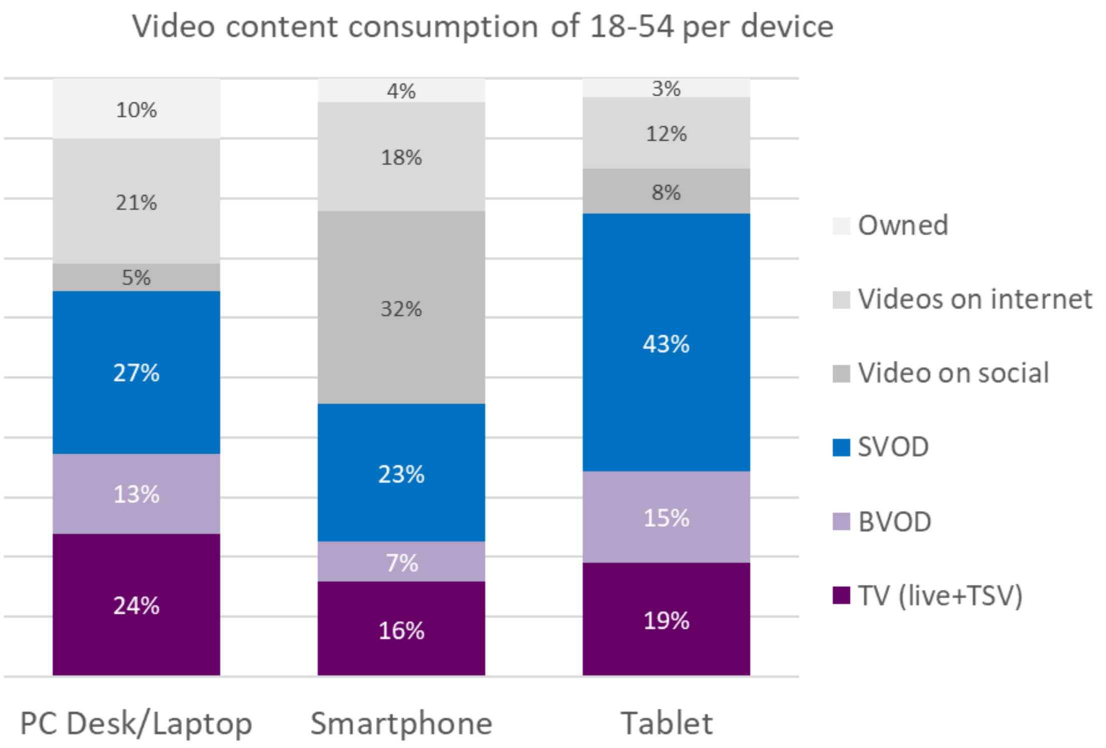
The broadcaster's activity on the TV-screen is defined in CIM as live viewing and time shifted viewing (TSV) up to 7 days after broadcast. In 2024 the window to detect TSV will be enlarged to 28 days. CIM uses "finger- printing" to recognize content on the TV-screen – this means comparing viewed content with a library of channels to find the right one.

The use of the TV screen to watch "non broadcaster content" on demand is growing, thanks to its connectivity. In the past Video/DVD was an important source and the viewing could be isolated. The new "SVOD" platforms like Netflix, Streamz, Disney+, video platforms such as Youtube and even the "BVOD" broadcasters platforms like VTMGO or Auvio allow on demand viewing of older content. This viewing is hard to identify.
As this volume becomes important, CIM is testing in 2024 the implementation of a router in the audimeter households to identify the streams. Based on the url's the volume of the different platforms can be defined.

WHAT IS TV ?

A lot of the content that is available on the “big TV Screen” can now also be watched on other screens and devices.
PC, Smartphone or Tablet are used to watch TV channels, BVOD (Broadcasters), SVOD (streaming platforms like) and of course other video content on social or Youtube and Tiktok.





The broadcasters have developed BVOD (Broadcaster Video On Demand) platforms to facilitate this viewing. These apps allow non-linear viewing of recent but also old content, allow binge watching and previews.

This online BVOD content is measured within the CIM internet study.
Content that is aired on the TV Screen and that is also recognized on other screens is brought together and is reported as 1 viewing figure.

Different solutions are possible to measure all the video activity on these devices but all have specific measurement issues that make it hard to use them on an ongoing base.

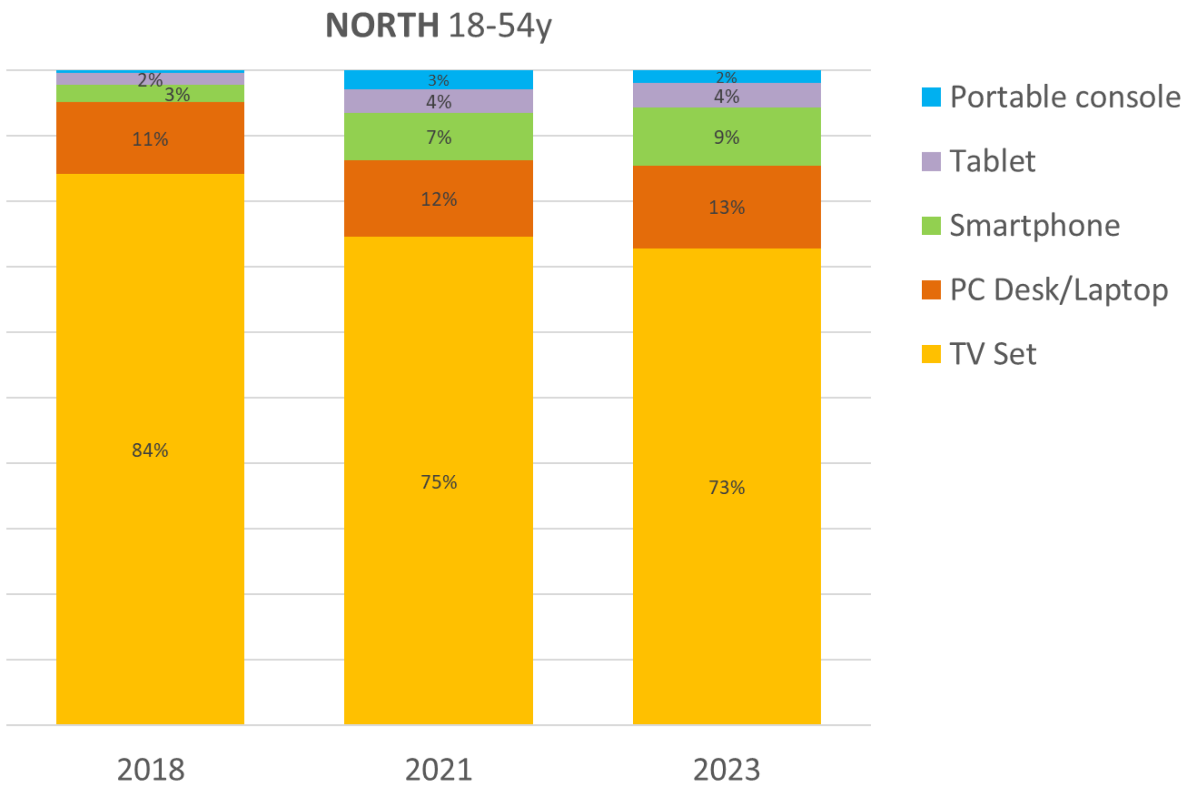
Source : Video Observer 2023 (RTL & VIA), 18-54y

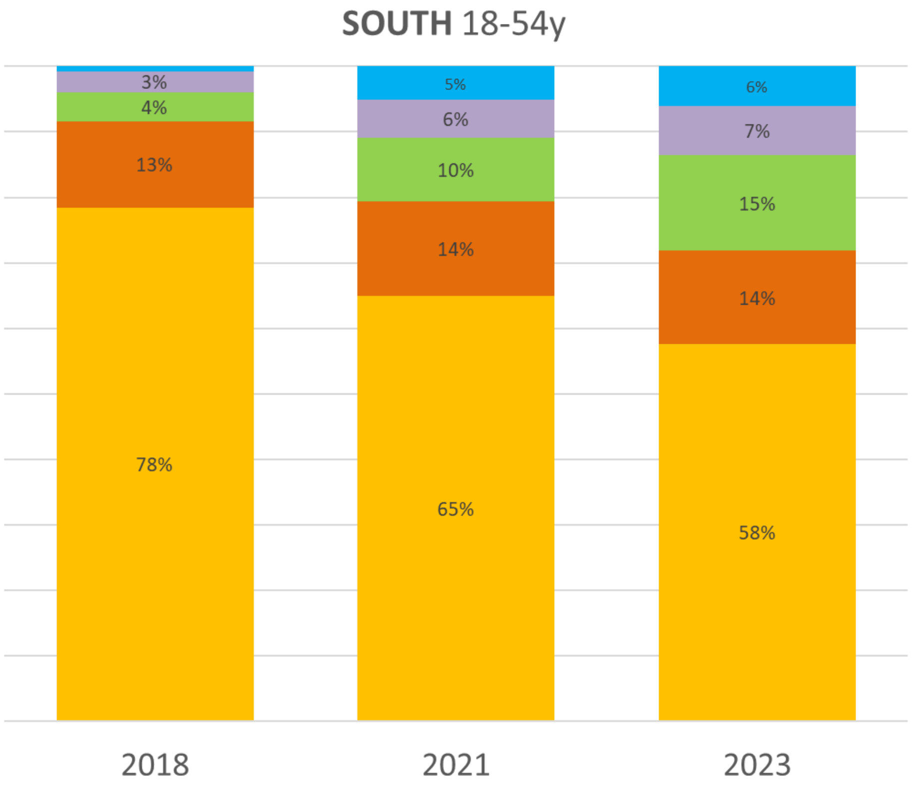
THE BIG SHIFT FROM THE BIG SCREEN TO OTHER SCREENS

While the big screen remains the most important device to watch "premium long form content" (films, series…) there is a shift towards other and smaller screens.
In the Video Observer one can have an idea of this shift by isolating this type of content (TV live, TV time shifted, Broadcasters video on demand (BVOD) and Streaming services (SVOD)) and looking at the devices that are used to watch it.

Especially in the South this evolution is outspoken. The smartphone has taken over from the desk/laptop for watching this kind of content. In the North the evolution is less extreme but steady.

When observing the declining viewing minutes on the big screen, one needs to take into consideration this shift. The eyeballs are not lost, they have simply moved towards another screen.





Source : Video Observer 2018, 2021 (IP Belgium), 2023 (RTL & VIA), 18-54y – TV (Live+TSV)+BVOD+SVOD

2. TV INVESTMENTS

Key facts

The covid year 2020 is now 3 full years behind us. While 2022 was the year of recovery, we still like to compare with pre-covid year 2019 to look a the longer trend.
In this comparison we include all sectors, also those that have a lot of mutual exchange, such as media. On the next pages, these sectors are excluded.

While the number of advertisers in 2022 was close to pre-covid, we see a slight decline. The number of brands however is clearly lower and lagging behing.
Still, the trend of using more different commercials and billboards is validated. The number of new commercials is rising (up to 91% of total) witch indicates that spot versions have a shorter life span.
The average spot length (of the regular spots excluding billboards) was exactly 20” in 2023.

In the North, 2 extra channels were added in 2023. This caused the rise of the number of aired spots, but the number per channel per day remained stable.
The same picture in the South: the number of channels remained stable, so did the number of aired spots. 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 :	2019	2020	2021	2022	2023	*Index vs 2022*
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*
Spotlenght (spots only	20.5''	21.3''	19.9''	20.1''	20.0''	*100*

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*

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

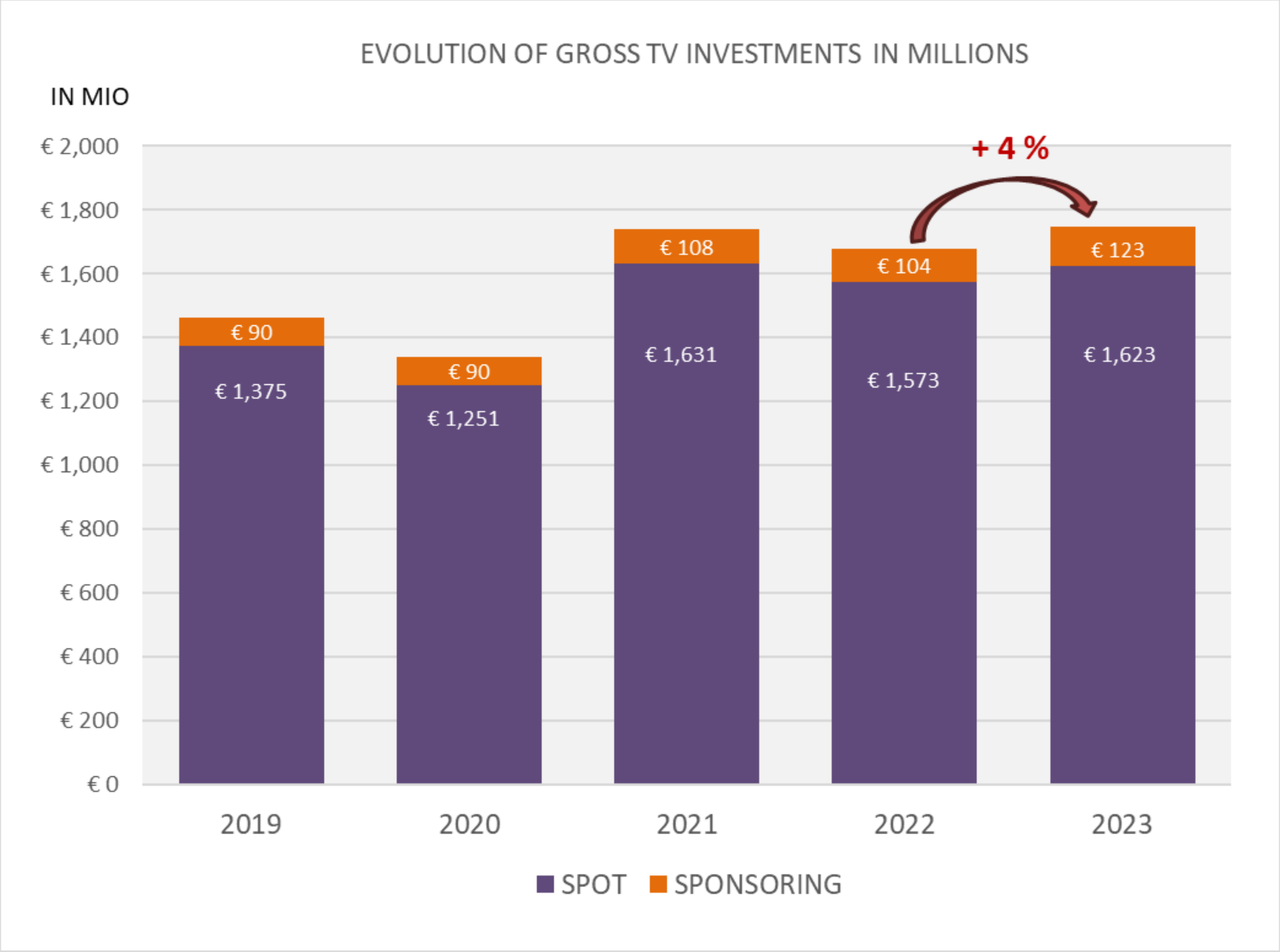
TV ADVERTISING. GROSS INVESTMENTS

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, 2023 was a recovery year. We left the energy crisis and the inflation behind shock. The TV spend, that decreased with -4% in 2022 to 1.677 Million euro rose again with the same +4% to end up at 1.747 Million euro – equal to the "all time high" of 2021. This is clearly above the pre-covid level, but of course we need to take into account price-inflation over the years.

When looking at the type of investment, sponsoring is clearly on the rise. It is an alternative way to avoid the cluttered spot environment.



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

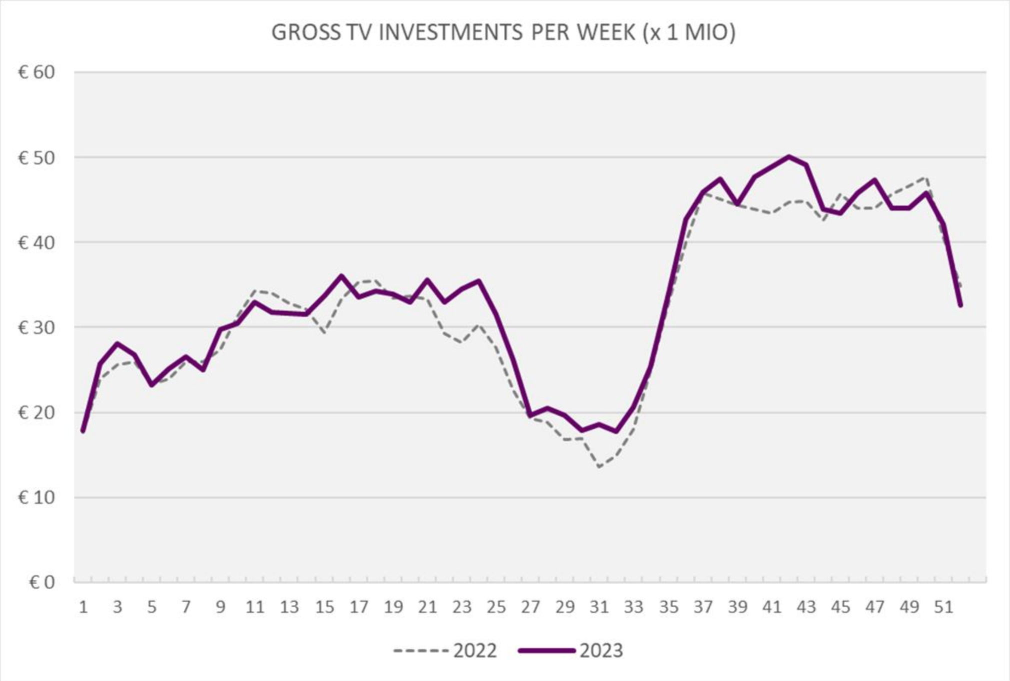
GROSS TV INVESTMENTS PER WEEK | PER DAY OF THE WEEK

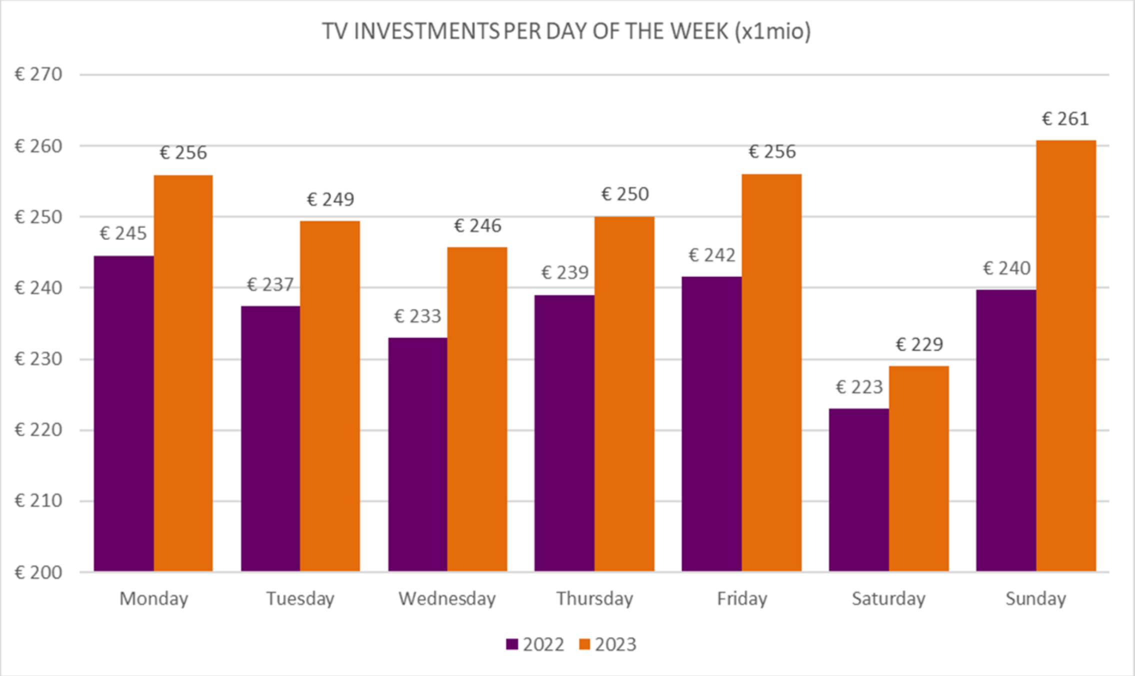
In general, the investments per week follow the classic curve of seasonality of TV investments with a drop during summer and a peak in the fall.

In spring the investments recovered versus 2022 that was impacted by the Ukraine war. This positive effect lasted all summer.
The start of autumn was exceptionally strong.

When looking at TV investments by day of the week it seems that the importance of specific days was accentuated in 2023. This is a surprise as a higher investment normally equalizes the spread over the days.

Thursday and Friday are typically important for the distribution sector, ahead of the weekend, while the audience is strong on Sunday.





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

GROSS TV INVESTMENTS PER ECONOMICAL GROUP

For a number of sectors 2023 was a year of recovery after a difficult year dominated by the Ukraine war and the effects like the energy crisis and the inflation uprise that resulted from it.

The most important sector Food went up again with 4% while Distribution went back to its peak 2021 level. The same movement happened in the Cleaning sector, that had the most important nominal gain of all sectors.

A few sectors show a continuous post-covid rise : Transport (Cars) is back on the 2019 level while Telecom and Pets are clearly surpassing it and are moving ahead.

The Services sector, that peaked in 2022 due to Governmental communication is back at more normal levels now.

Last but not least : the culture & tourism sector has fully recovered and maintained its high level during 2023.

Economical group (in mio)	2019	2020	2021	2022	2023	*index vs 2022*
FOOD	€ 322	€ 272	€ 379	€ 325	€ 339	*104*
DISTRIBUTION	€ 186	€ 196	€ 306	€ 297	€ 305	*103*
CULTURE, TOERISM, SPORT	€ 184	€ 160	€ 172	€ 191	€ 189	*99*
BEAUTY - HYGIENE	€ 196	€ 158	€ 197	€ 175	€ 187	*107*
HEALTH - WELLBEING	€ 102	€ 104	€ 118	€ 138	€ 137	*99*
TRANSPORT	€ 126	€ 80	€ 107	€ 123	€ 131	*107*
SERVICES	€ 88	€ 92	€ 115	€ 118	€ 110	*94*
CLEANING PRODUCTS	€ 88	€ 99	€ 110	€ 81	€ 105	*130*
TELECOM	€ 77	€ 75	€ 82	€ 85	€ 100	*118*
HOME IMPROVEMENT	€ 62	€ 76	€ 114	€ 103	€ 97	*94*
ENERGY - FUEL	€ 19	€ 17	€ 20	€ 17	€ 19	*110*
PETS	€ 4	€ 3	€ 8	€ 9	€ 13	*143*
CLOTHES - ACCESSOIRES	€ 9	€ 8	€ 10	€ 14	€ 13	*91*
TOTAL	**1464**	**1340**	**1739**	**1676**	**1747**	**104**

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

GROSS TV INVESTMENTS – ADVERTISERS TOP 25

The top 25 advertisers represent 37% of all TV investments. This is up from 35% last year.

There are a few changes in the Top 10 : newcomers are Orange and AS Watson (AS Adventure), in favor of Delhaize and Nationale Loterij.
At the bottom of the list we see the drop out of EG, Aldi and Lego in favor of come-back advertisers Vinted, Nestlé and Pepsico.

P&G remains by far the biggest advertising group, while Ferrero gains 2nd place before Unilever – both went up one rank as Coca-Cola continues to decline.

In the distribution category, we note an increase for Delhaize (+6%) and Colruyt (+4%) while Aldi dropped out of the top.
In e-commerce and "home delivery" we see a recovery for Vinted (+32%) and Hello Fresh (+7) after there decline last year. Bol.com remained stable while Coolblue continued its decline.
All telecom parties have grown their TV investments.

The car industry did well last year with another increase for D'Ieteren (+11%) and Renault (+8%).

In telecom, Proximus continued its growth while Orange rose from 22th to 8th position as the biggest grower in the ranking. Regional advertiser Telenet declined.

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

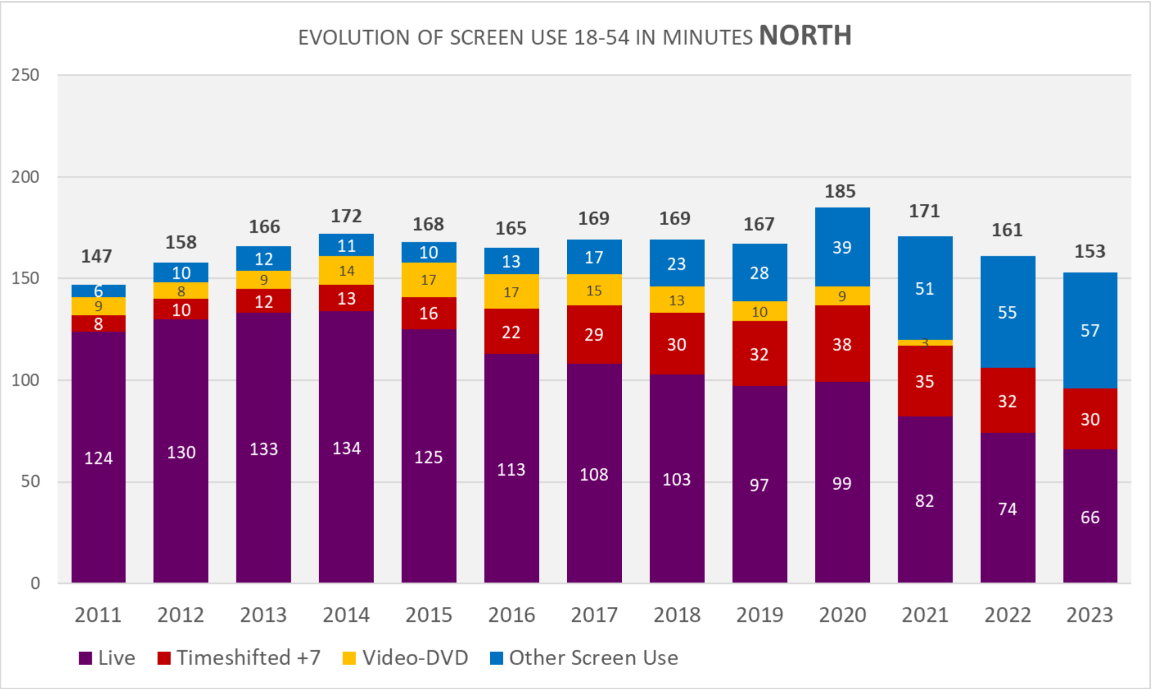
Source : Nielsen MDB - Excluded : (Associated) Manifestations/Shows, Fairs, Media/Publishers

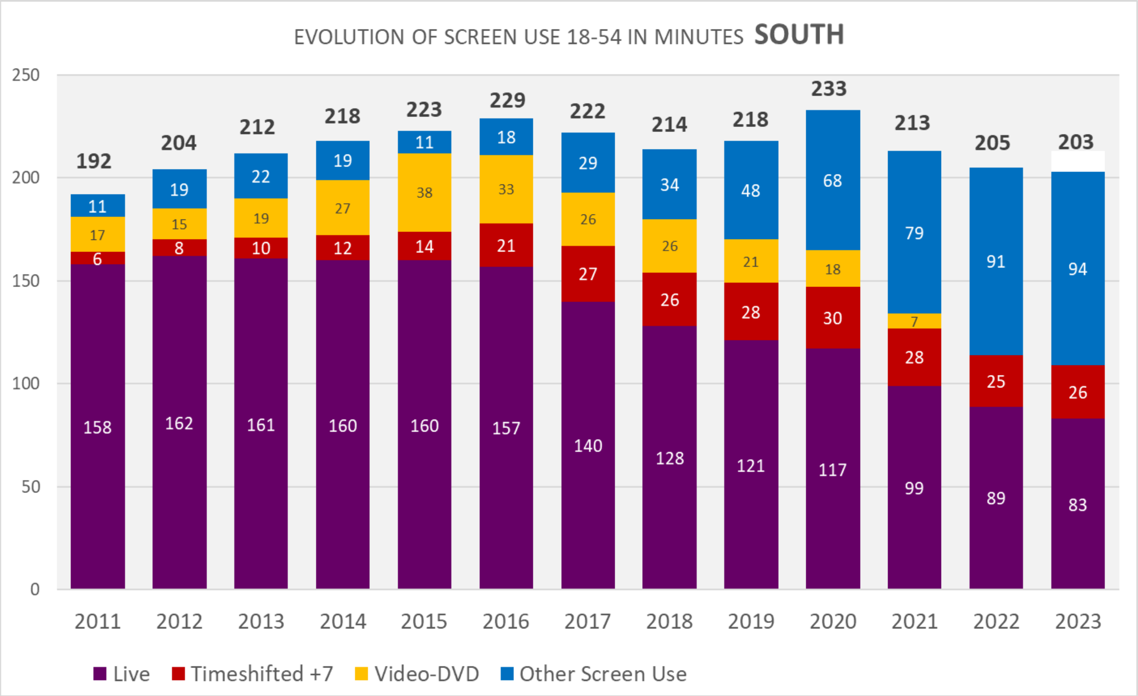
3. WATCHING ON THE TV SCREEN

TV-SCREEN TOTAL CONSUMPION ON TARGET 18-54 YEARS

Total time watching the TV screen continues to drop after the covid peak. As indicated before, this is mainly due to the shift towards other screens.
In the North, people 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 54’ in 2021 to 57’ last year and in the South from 86’ in 2021 to 94’ in 2023.

It is the consumption of TV-channels – especially live viewing - that continues to drop or that shifts towards other screens.
Interesting to see that in the North timeshifted viewing continues to declines for a 4th year in a row (note that only 1 week of viewing after broadcast is measured, after that viewing is considered to be Other screen use).
When comparing broadcaster content versus Other screen usage, the broadcasters still account for 63% of all viewing on the first screen in the North, and 53% in the South (where the actual minutes are still higher versus the North).



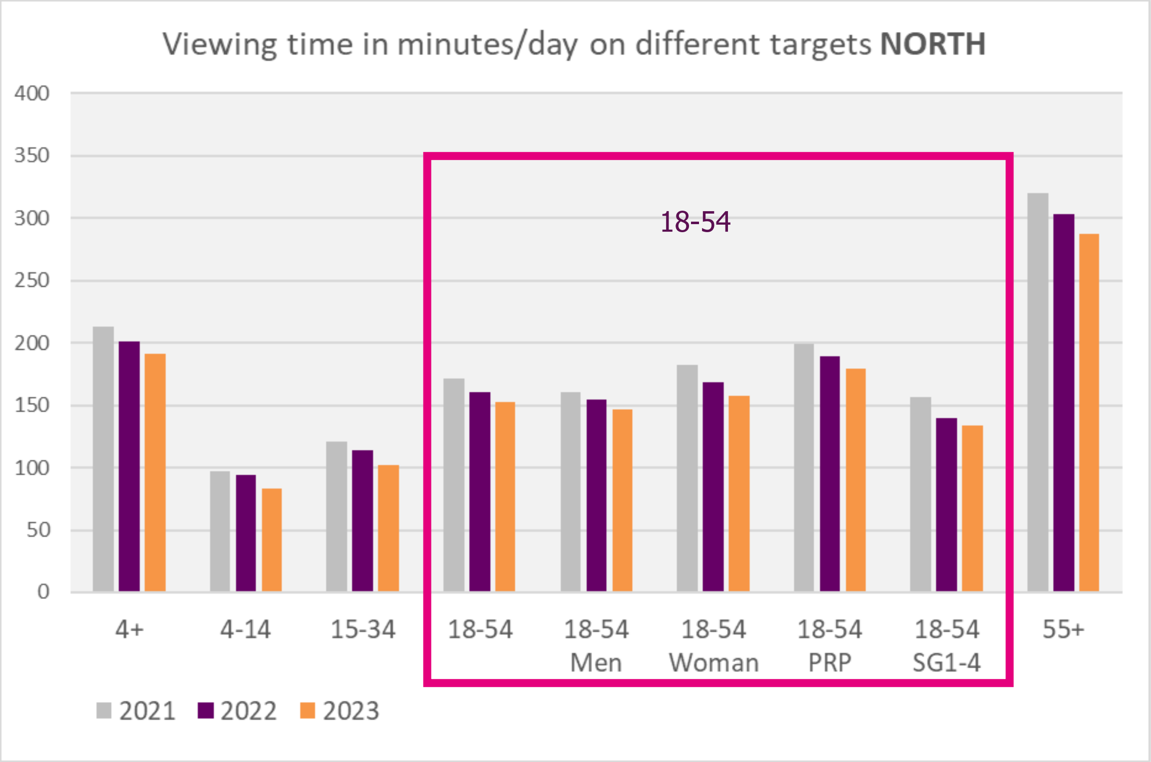


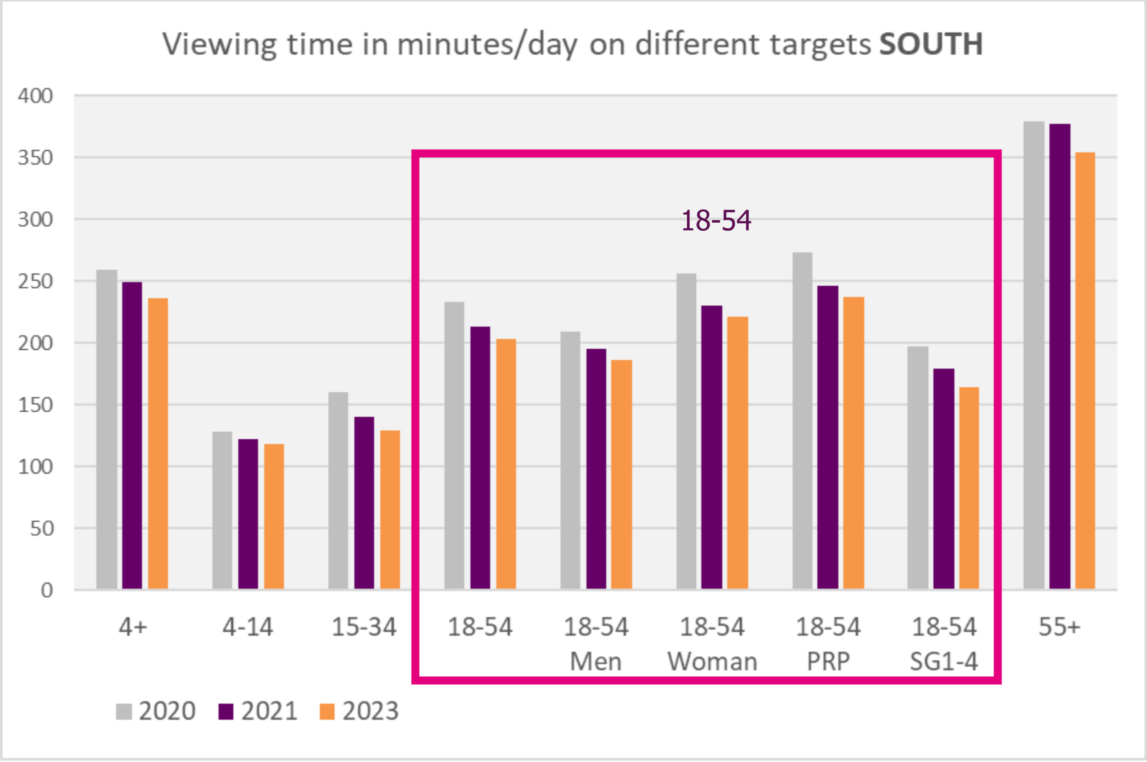
Source : CIM TV, All 18-54, Live+7, Total screen use,

▶ 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 2022.
Some exceptions : more limited decline with children – and in North Men and the higher social groups 1-4 seem to be more resisent.

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.



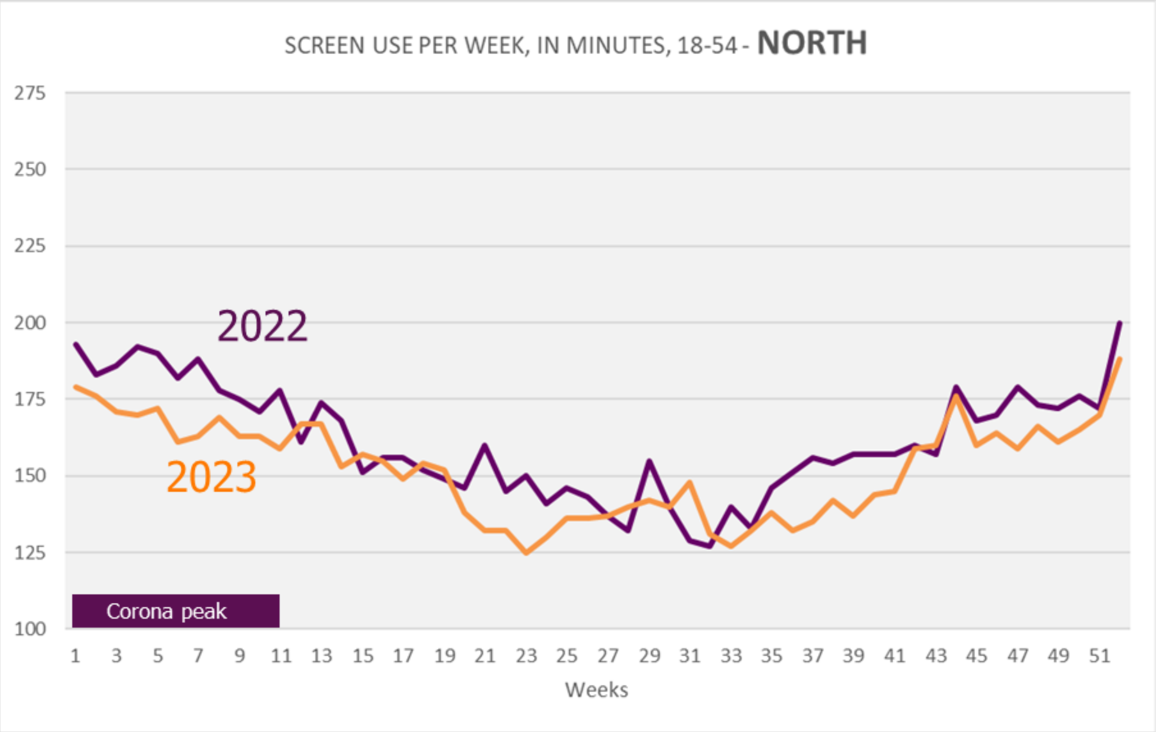


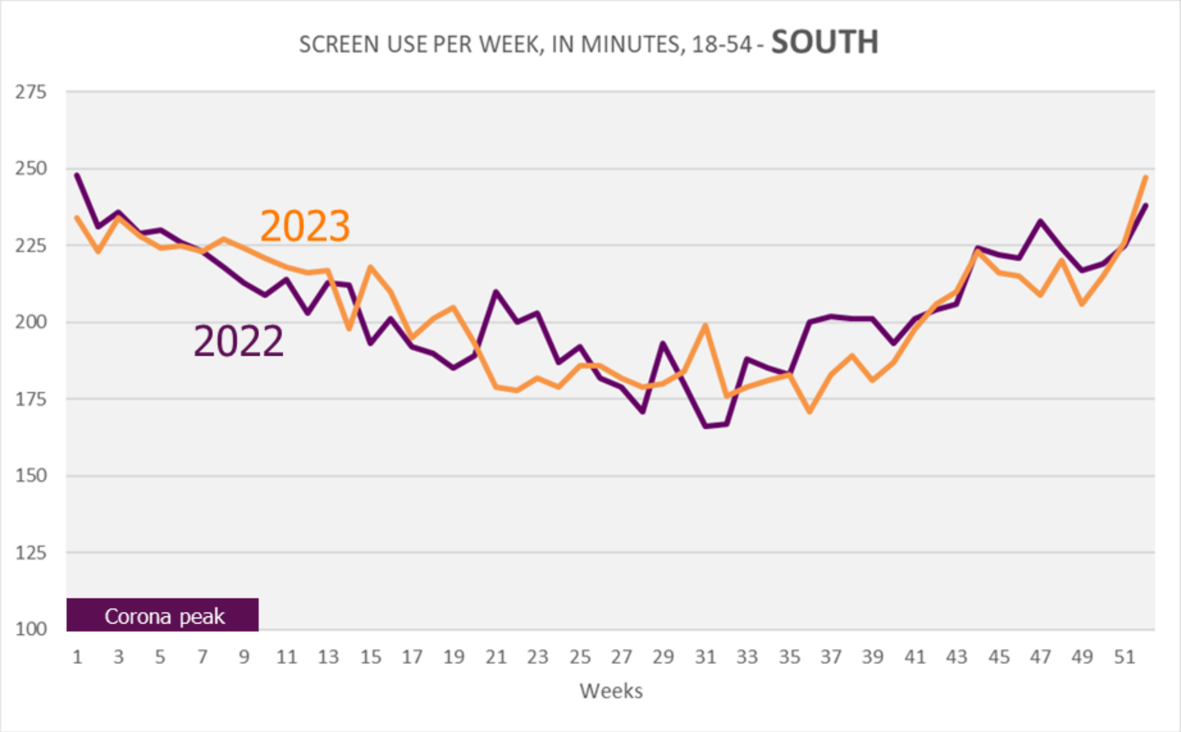
Source : CIM TV, All 18-54, Live+7, ATV

EVOLUTION OF TV SCREEN USE PER WEEK

Looking at tv consumption on a weekly basis, the typical seasonality of TV viewing shows.
We tend to forget, but at the start of 2022 we had the highest peak of covid (Omicron) what explains the high viewing levels at that time.

The viewing levels in 2023 were certainly affected in a negative way in June and September –October because of the good weather conditions.



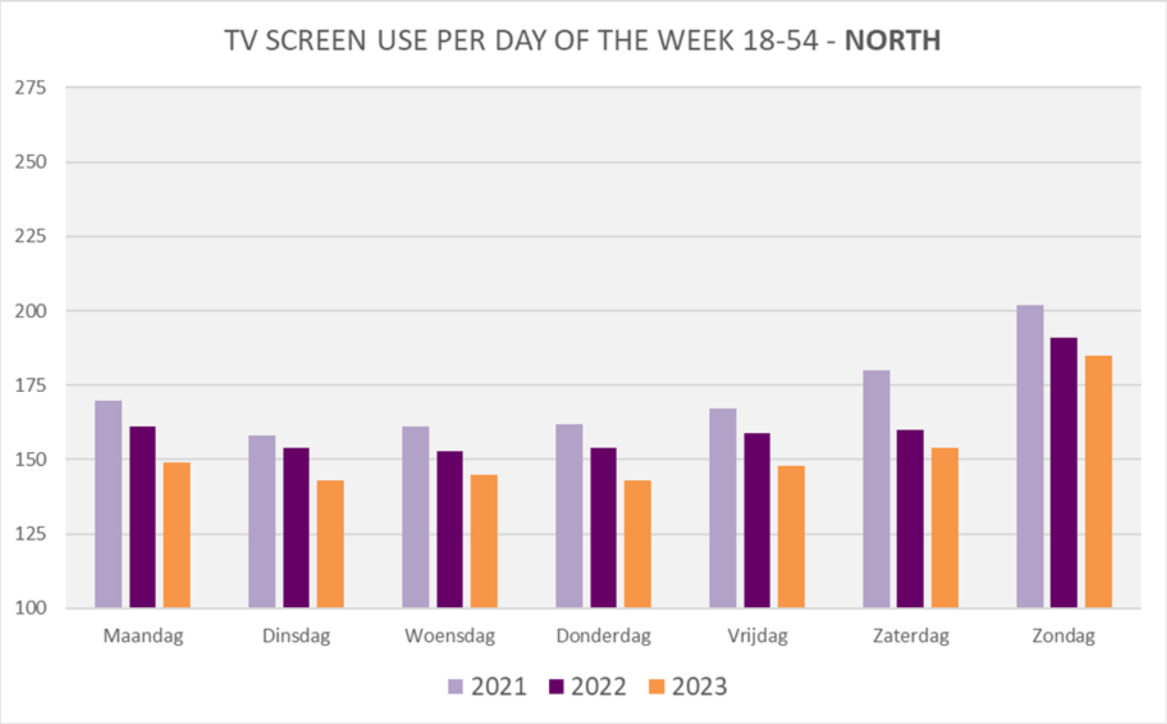


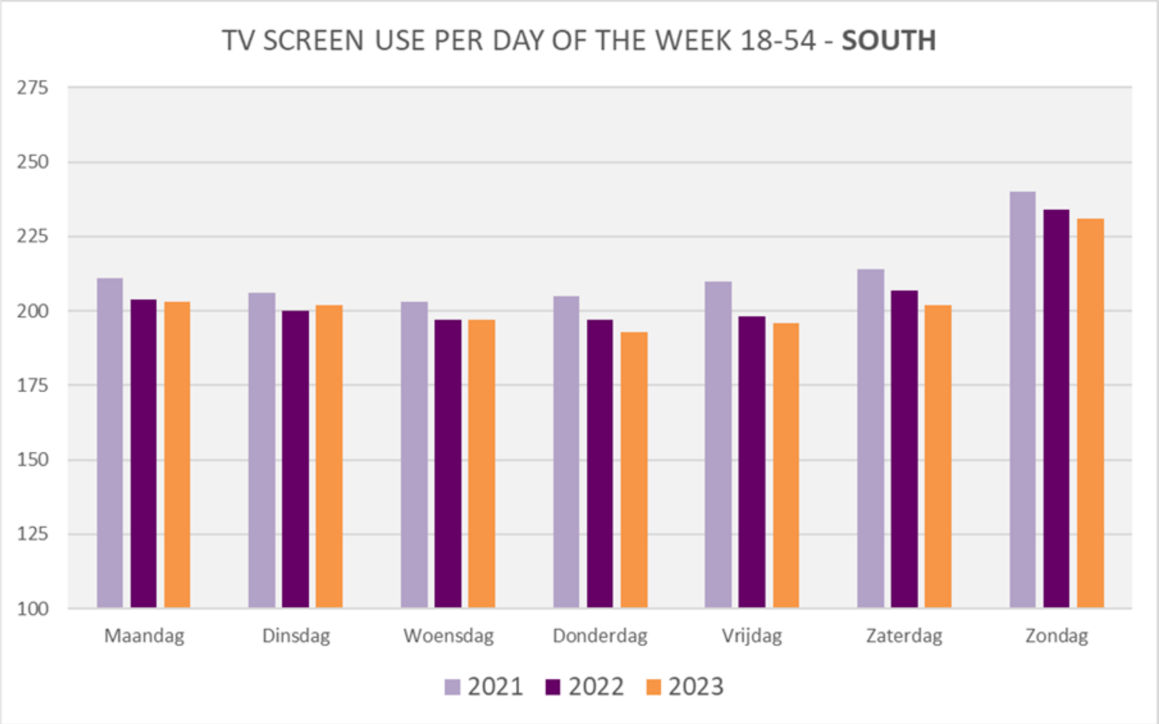
Source : CIM TV, All 18-54, Live+7, ATV

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 trend of a decline is reproduced all days.

In the north, Saturday was the most resistant after an important drops last year.
In the south, such a trend was not visible. Overall viewing per day remained quit stable.





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

TV CHANNEL SHARES ON TARGET 18-54 IN THE NORTH

When looking at the market shares, the top ranking did not change. The 6 VTM channels combined had 35.2% market share on the target 18-54. The 3 VRT channels combined had 27.2% while alle Play channels (including sport channels) obtained 18.1%.

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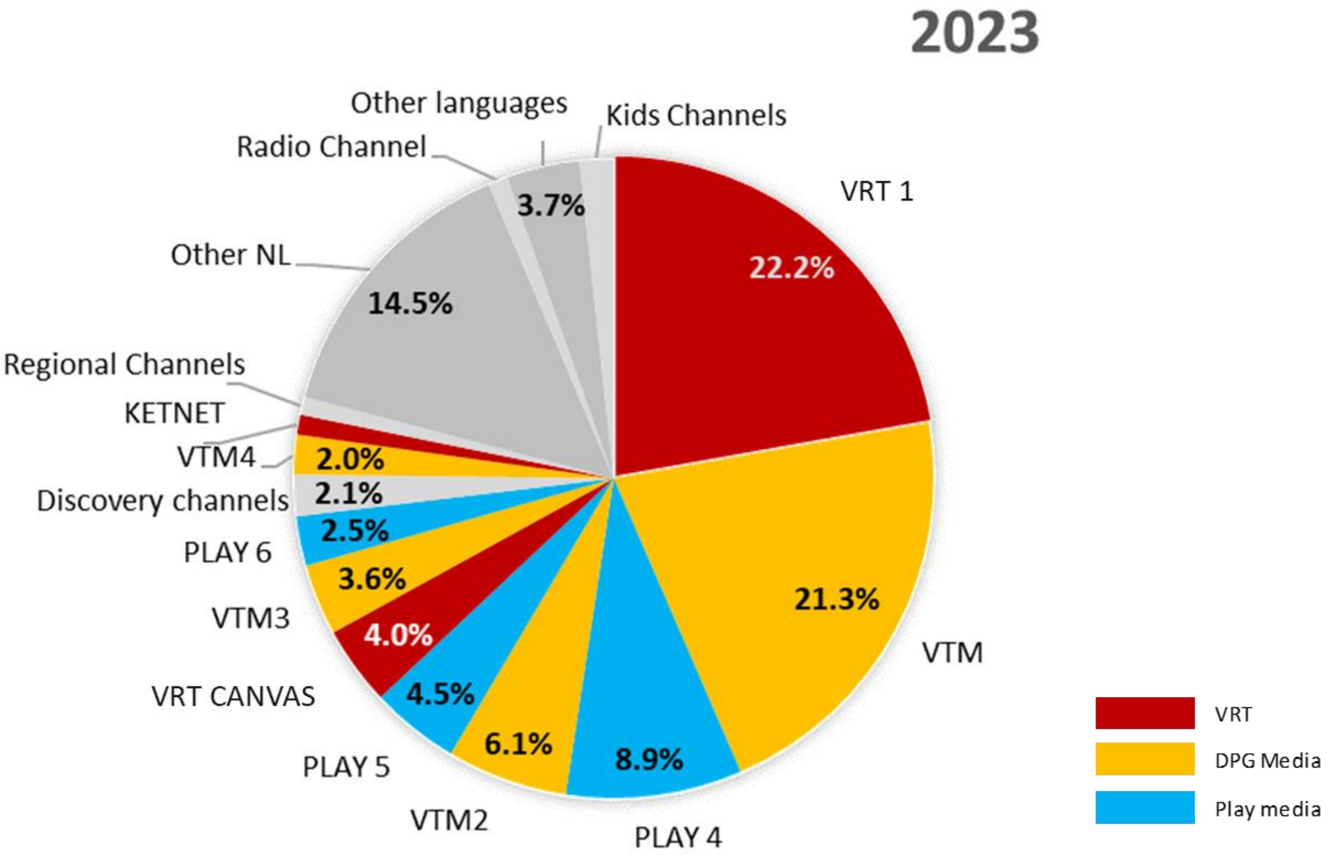
This means that the three main local broadcasters (VRT, DPG and Play Media) have a combined market share of 80%
The effect of the language remains crucial. More than 96% of the content is Dutch or has Dutch subtitles.



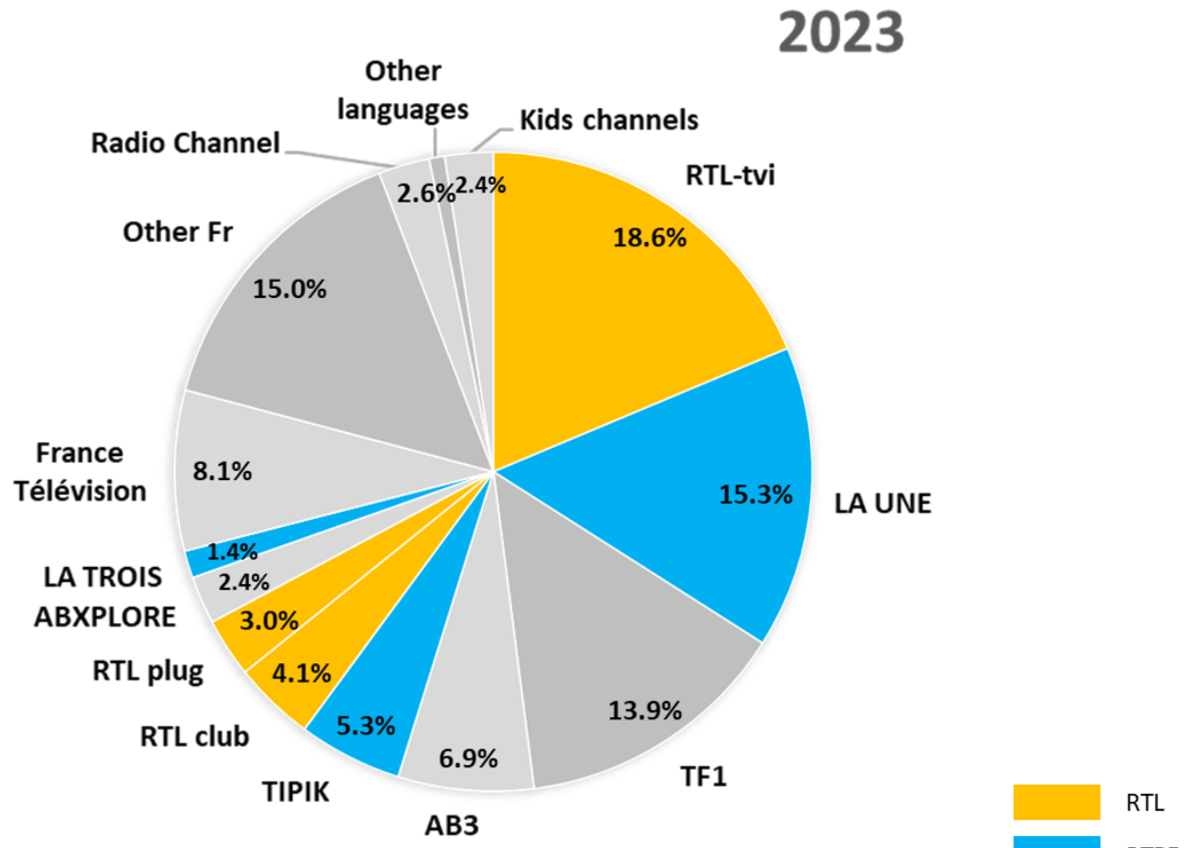
	2023 versus 2022
VRT 1	- 0.1%
VTM	- 0.5%
PLAY 4	+ 0.4%
VTM2	+ 0.0%
PLAY 5	+ 0.8%
VRT CANVAS	- 0.6%
VTM3	+ 0.2%
PLAY 6	+ 0.1%
Discovery channels	- 0.6%
VTM4	- 0.1%
KETNET	- 0.2%
Other NL	+ 1.6%
Other languages	+ 0.2%
Radio Channel	+ 0.0%
Regional Channels	- 0.1%
Kids Channels	- 0.7%

Source : CIM TV – 18-54 – Live+7

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.
The 3 RTL channels obtain 25.7% share in total, while the 3 RTBF channels get 21.9%.

As TF1, AB3 and ABXplore are also commercially exploitable in Belgium the total commercial share gets up to ¾ (including smaller channels).
Also notable is that the share of other languages is really marginal in the south.

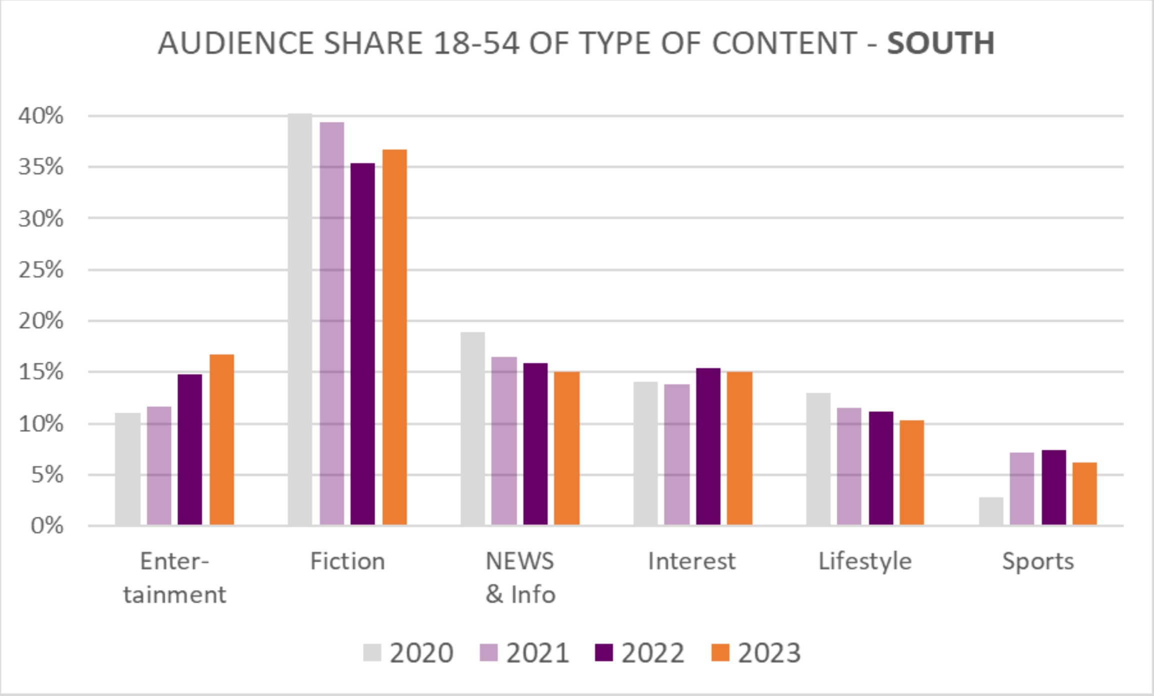


	2023 versus 2022
RTL-tvi	- 1.4%
LA UNE	+ 1.8%
TF1	+ 0.2%
AB3	+ 0.3%
TIPIK	- 1.1%
RTL club	+ 0.3%
RTL plug	+ 0.2%
ABXPLORE	- 0.0%
LA TROIS	+ 0.1%
France Télévision	+ 0.2%
Other Fr	+ 0.3%
Radio Channel	- 0.9%
Other languages	- 0.1%
Kids channels	- 0.2%

4. BROADCASTERS CONTENT (on the TV screen)

▶ 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 2023 and is on the raise again after a decline last year.
Especially Entertainment is on the rise and gets to the level in the North – all different types are growing.
General news is declining since 2020.
The hype on “lifestyle cooking” seems to be over as the share declined again in 2023.

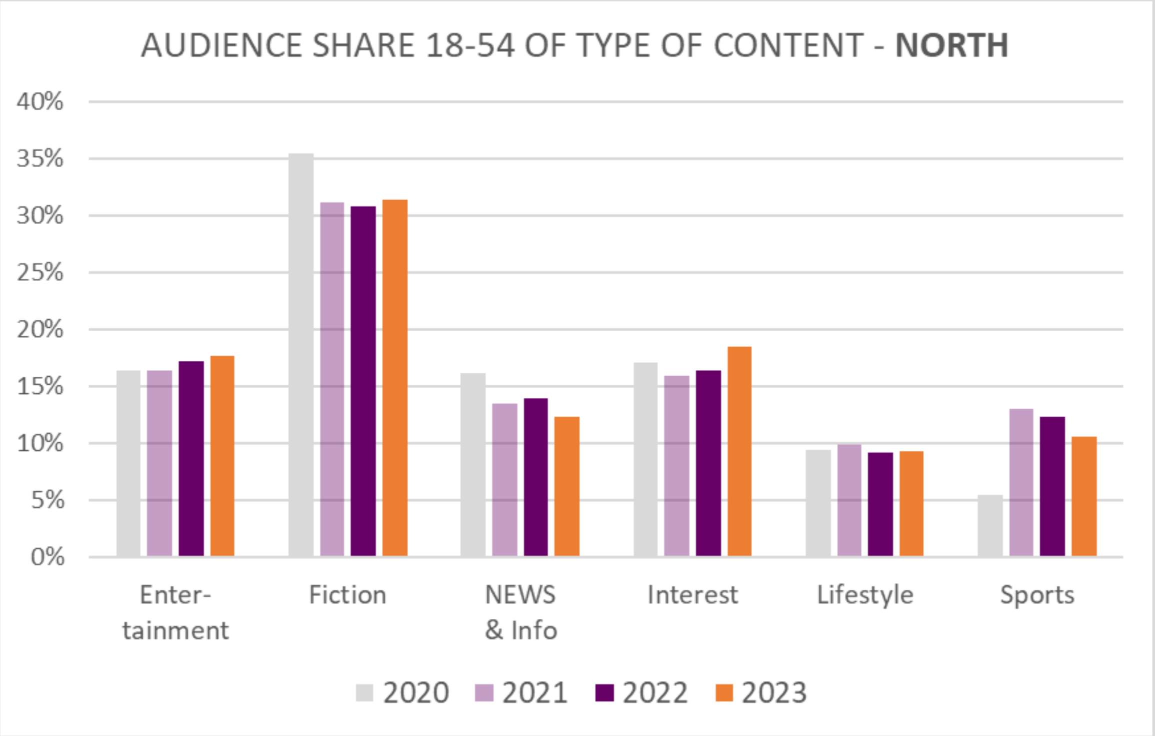


SOUTH	2020	2021	2022	2023
Entertainment Game shows	5%	5%	6%	7%
Entertainment other	2%	2%	2%	3%
Entertainment Music	4%	5%	6%	7%
Fiction drama	7%	7%	6%	6%
Fiction action/adventure	11%	11%	10%	11%
Fiction comedy	9%	8%	7%	7%
Fiction other	3%	3%	3%	2%
Fiction Police/Detective	9%	8%	8%	9%
Fiction Soap	0%	2%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

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

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. It remained stable in 2023 with some categories going up while others go down.
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	2020	2021	2022	2023
Entertainment Game shows	6%	6%	6%	7%
Entertainment other	3%	4%	5%	5%
Entertainment Music	8%	6%	6%	6%
Fiction drama	8%	6%	6%	5%
Fiction action/adventure	8%	6%	6%	6%
Fiction comedy	7%	7%	6%	5%
Fiction other	2%	2%	2%	3%
Fiction Police/Detective	6%	5%	6%	7%
Fiction Soap	4%	4%	5%	5%
General news+specials	12%	10%	11%	10%
Information	4%	3%	3%	2%
Interest Human/society	13%	12%	13%	15%
Interest other	4%	4%	3%	4%
Lifestyle cooking	4%	3%	3%	3%
Lifestyle decoration	1%	2%	2%	2%
Lifestyle other	5%	5%	5%	5%
Sports cycling	2%	3%	4%	4%
Sports Football	2%	6%	5%	3%
Sports other	1%	4%	3%	3%
TOTAL	100%	100%	100%	100%

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

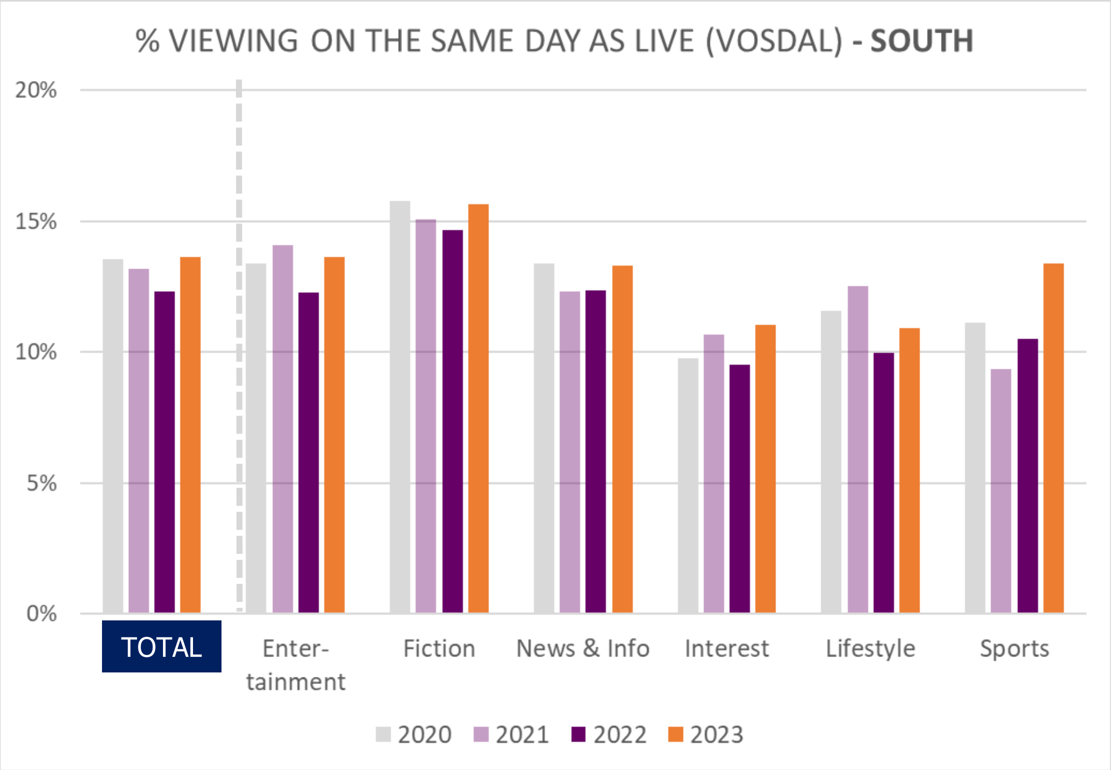
TIME SHIFTED VIEWING IN THE SOUTH, 18-54

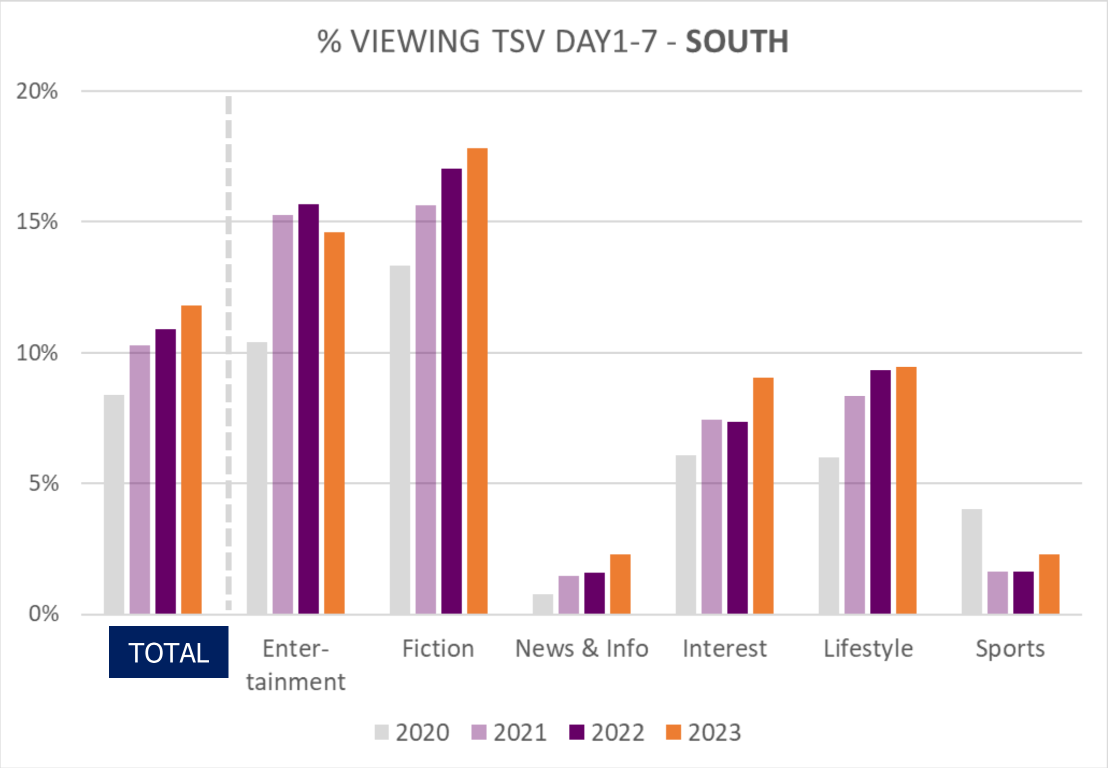
Timeshifted viewing breaks down into 2 components : viewing on the same day as live (VOSDAL)= 54% in 2023 and viewing later in the week = 46% of all delayed viewing.

Shifted viewing on the same day is a form of time management. This explains why the levels are the same for the different types of content.

In the days following the broadcast, there is much more difference depending on the type of content. This is much more viewing on demand and it explains why news or sports are much lower at these are typical “live” items.

News and sports are even more neglected than in the North





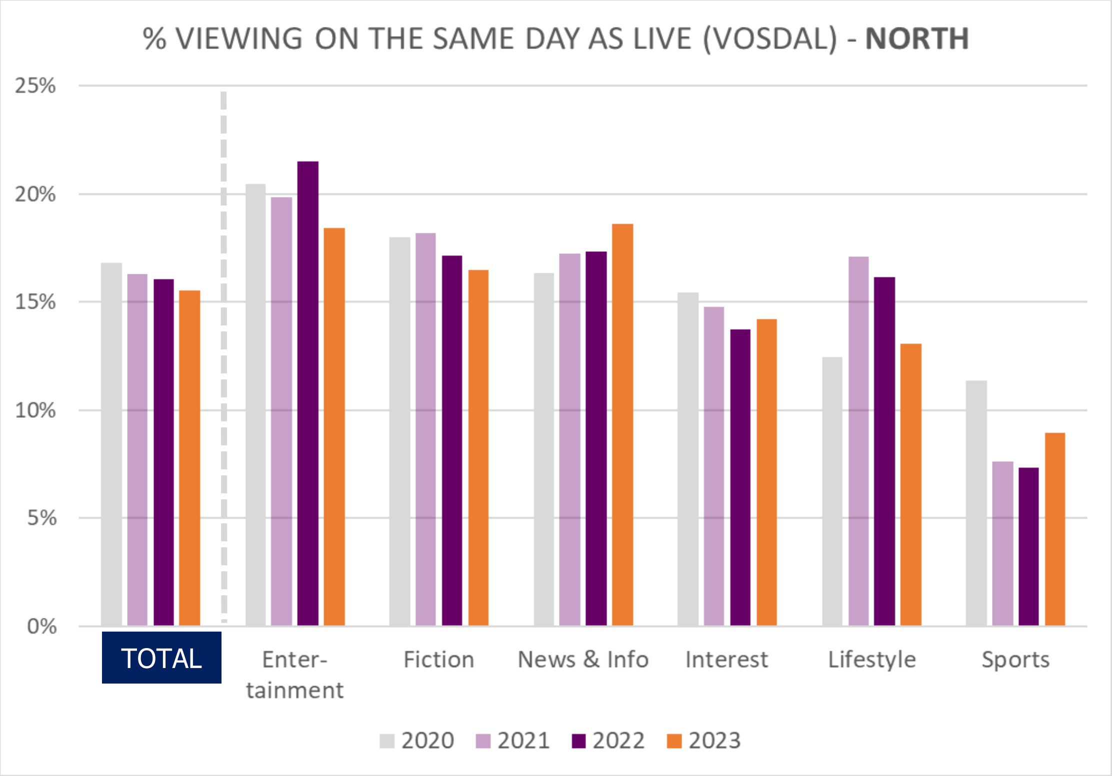
Source : CIM TV, All 18-54, Live+7, ATV, typology CIM

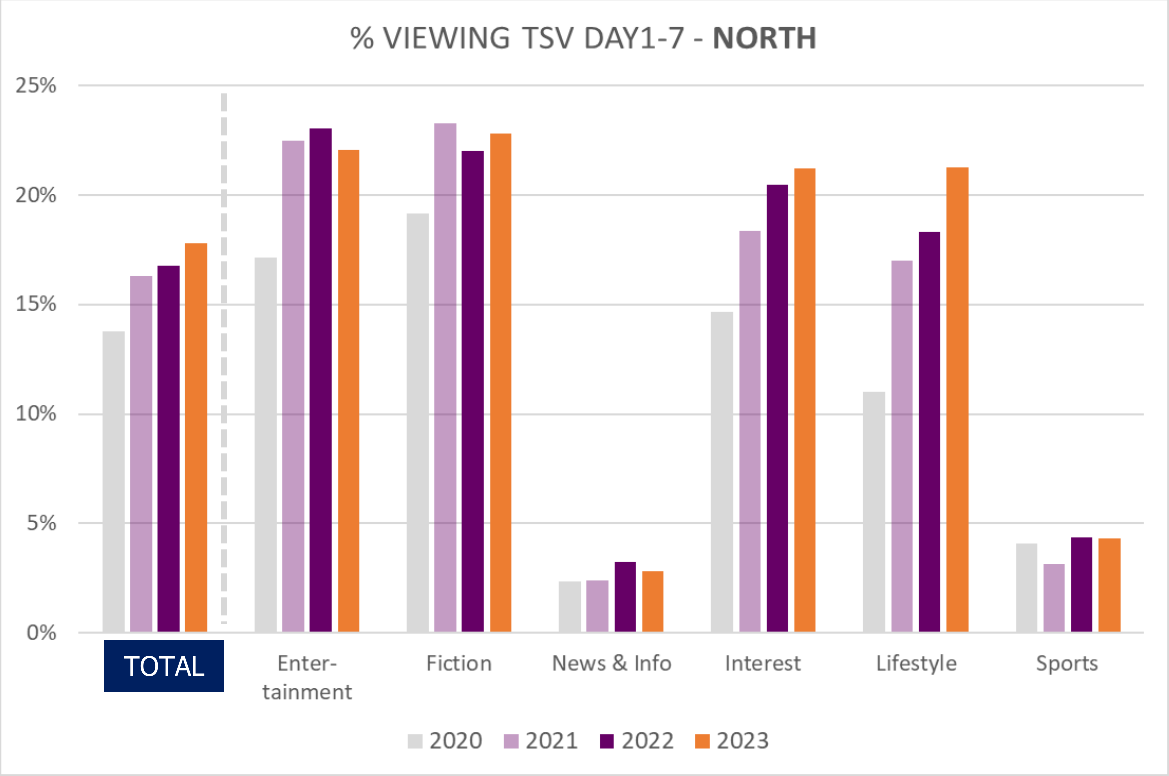
TIME SHIFTED VIEWING IN THE NORTH, 18-54

Timeshifted viewing breaks down into 2 components : viewing on the same day as live (VOSDAL)= 47% in 2023 and viewing later in the week = 53% of all delayed viewing and growing.

Shifted viewing on the same day is a form of time management. This explains why the levels are the same for the different types of content, in the North with the exception of sports.

CIM only measures the viewing from day 1 to day 7 – after that viewing is not detected and becomes "unknown".
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. Interest and Lifestyle are showing growth again compared to previous years





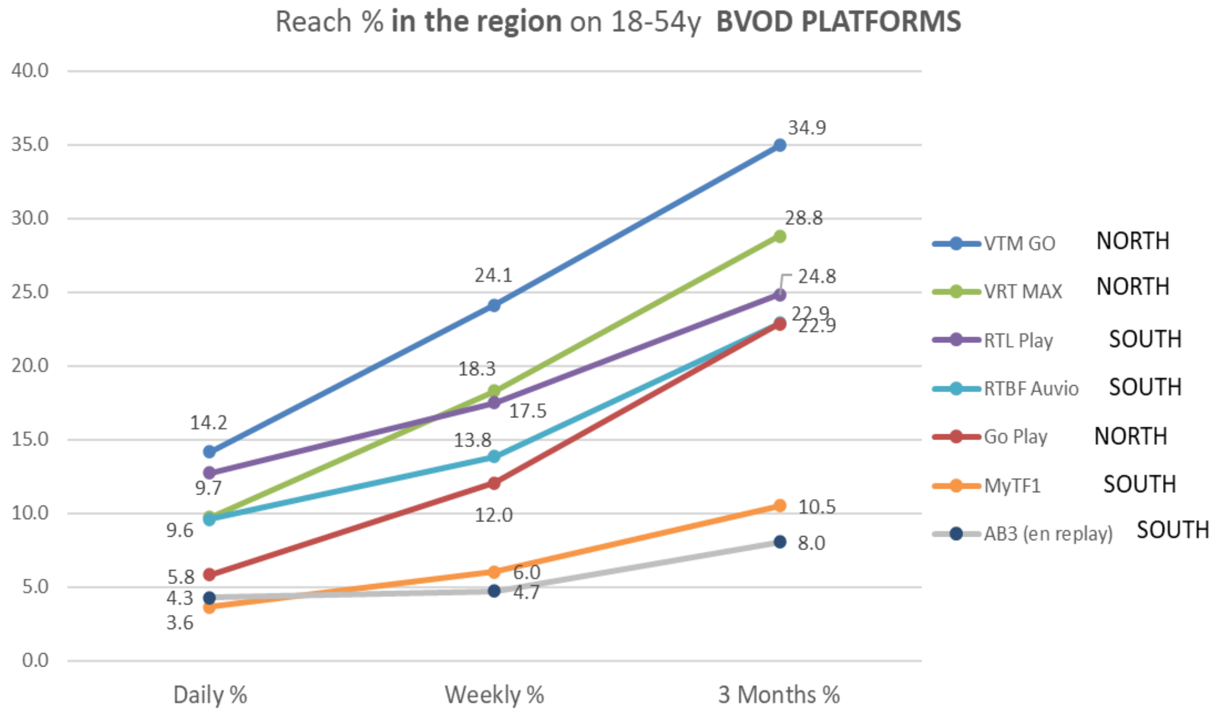
Source : CIM TV, All 18-54, Live+7, ATV, typology CIM

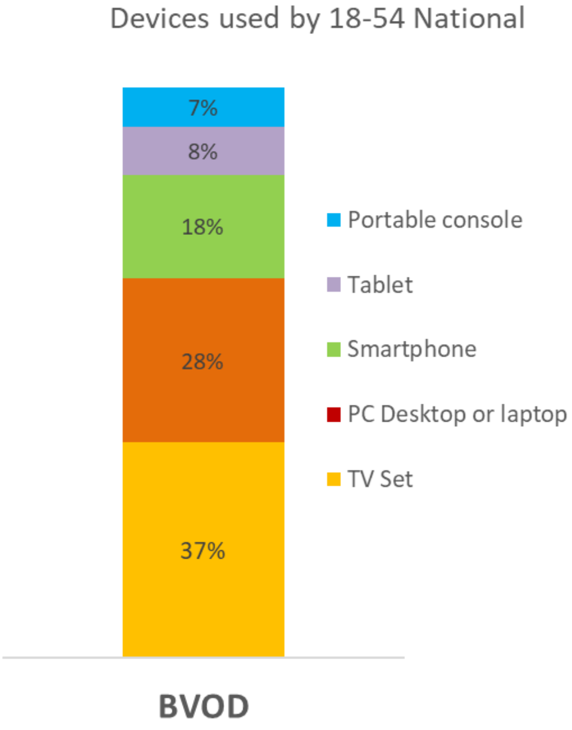
5. BROADCASTERS CONTENT ON OTHER SCREENS

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 online. These so-called BVOD platforms (Broadcaster Video On Demand) focus exclusively on video and offer full episodes of programs, often also older content. In terms of look & feel, they are fully comparable to the Subscription based (international) Video On Demand platforms (SVOD).

These BVOD platforms can be accessed on all internet connected devices, As smart TV's are on the rise, already 1/3 of the viewing is on the big screen. If the content is older than 1 week, it is considered "unknown" for the classic measurement but live or TSV0+7 is recognized.
The reach potential is considerable and it offers an excellent complement to the "normal" broadcast.





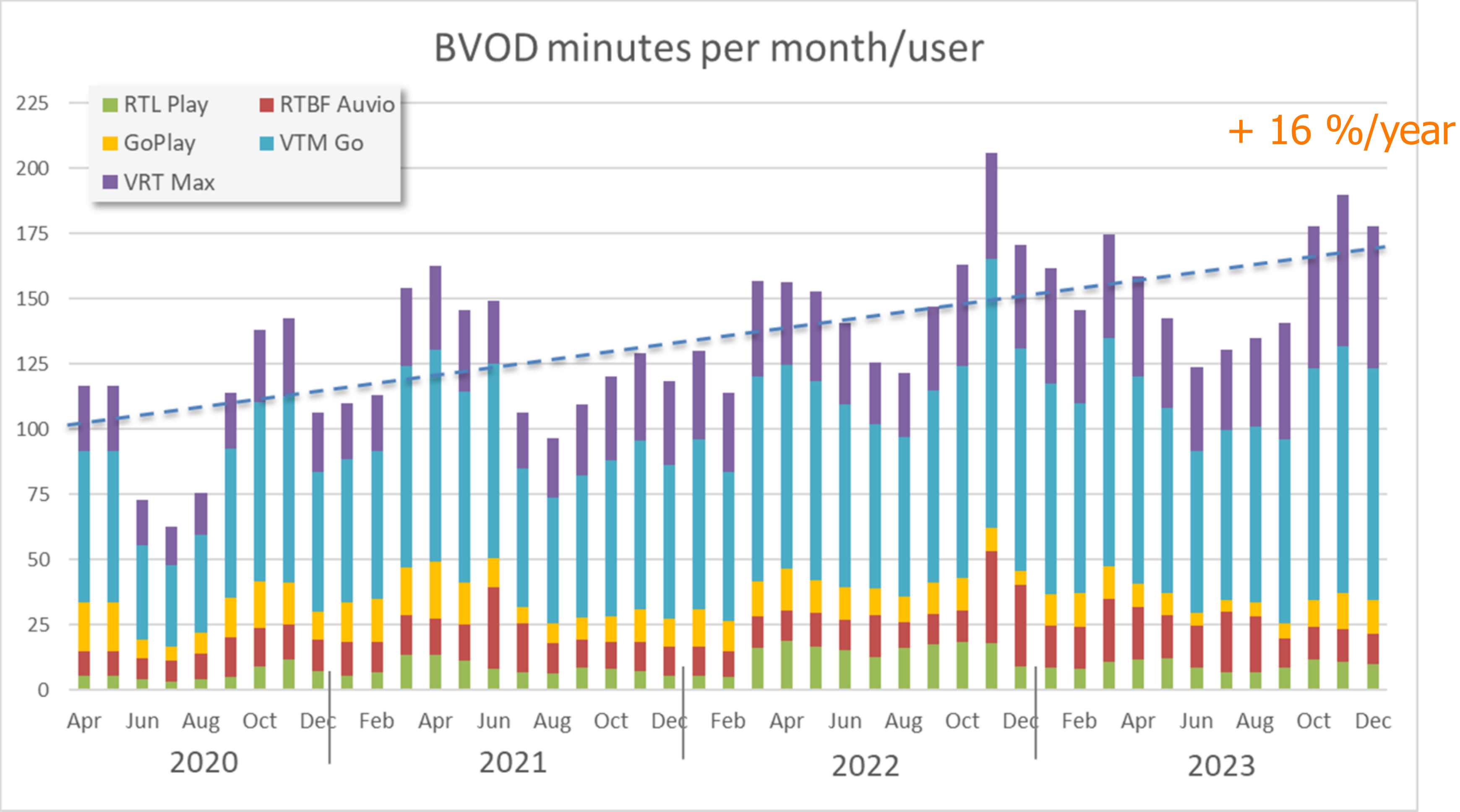
Source : Video Observer 2023 (RTL & VIA)

EVOLUTION OF THE BROADCASTER PLATFORMS - BVOD

CIM Internet measures the BVOD platforms since April 2020.

When looking at the long term evolution, the overall progression of the 5 BVOD services combined is +16% on an annual basis.

Live sports are an important catalyst for use – we can see peaks in summer 2021 (Euro Football, Olympic Games) and the end of 2022 (Worldcup).



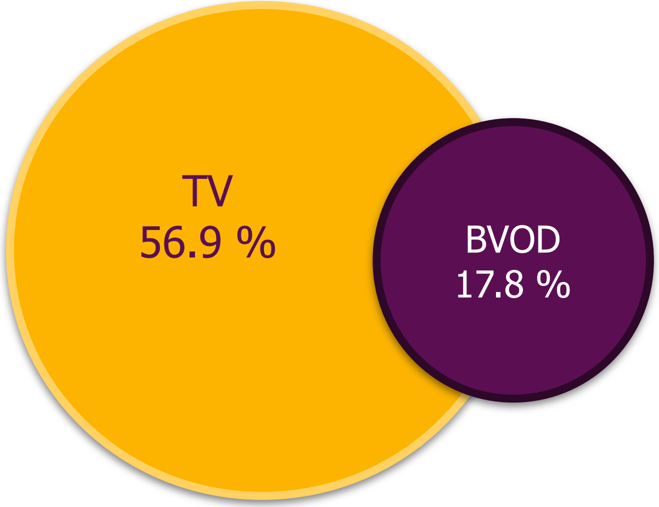
Source : CIM Internet, All 18-54, Apr2020-Dec 2022, ATV, Video only, Belgium only. Videoplayers are the actual names, other playernames were used in the observed period.

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 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 a campaign of 330 GRP with a split TV/BVOD of 84/16 in the North and 90/10 in the South.
With only little switch from TV to BVOD, the reach grows from 56.9 to 64.8% in the North. In the South the incremental reach is lower but the potential is growing.

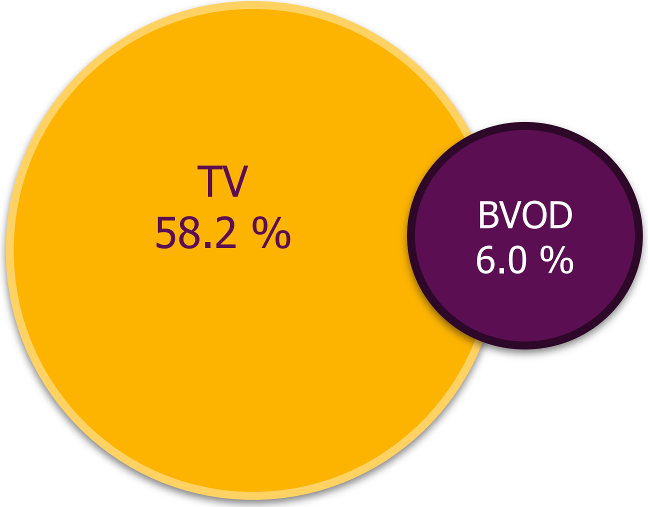
NORTH



+ 7.9 %
incremental

TOTAL REACH 64.8 %

SOUTH



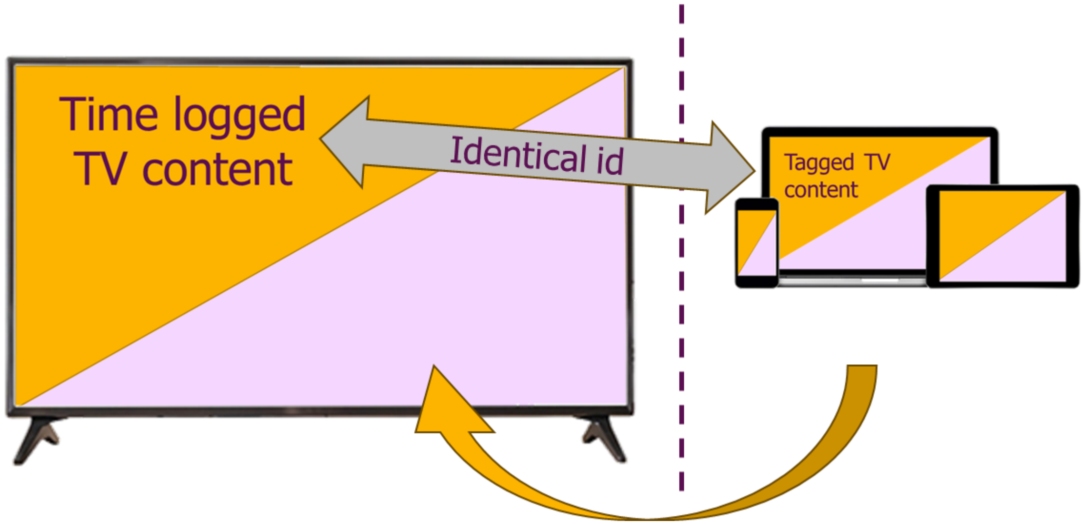
+ 2.6 %
incremental

TOTAL REACH 60.8 %

Source : CIM ToVA planner, on 18-54, April 2023. 330 grp. Budget split : TV/BVOD : : 90/10 in the South and 84/16 in the North

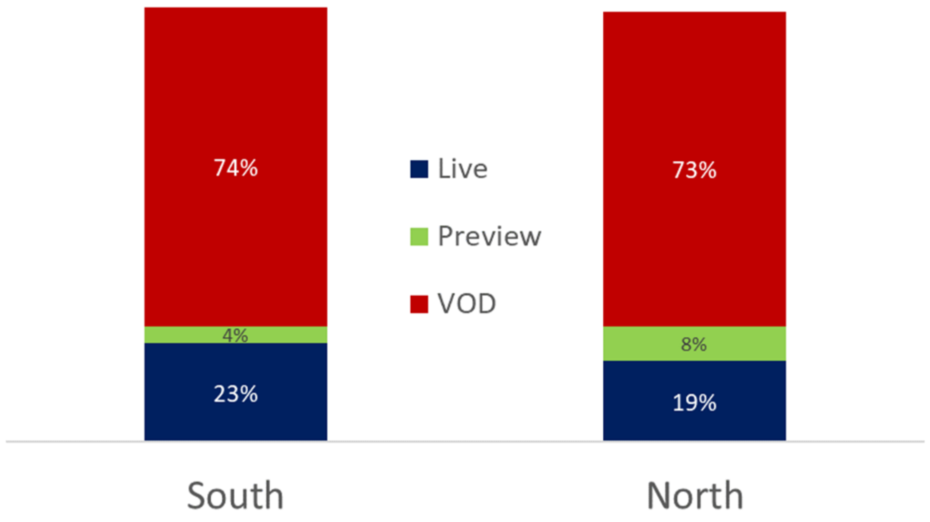
ONLINE VIEWING OF TV CONTENT

When TV content is broadcasted it generates an id that can be used online to recognise the content.
These id's appear in the tagging of the online stream and allows programmes that are viewed up to 28 days after broadcast to be added to the TV screen results to generate a total picture.
As profiling online remains a challenge the results are actually only available on total population 4+.
The views are recalculated towards a "webrating", that takes into account the viewing time. This is identical to the calculation rules on TV, but is not comparable to an impression of minimum 2" (the way it is used in the internet world).



These BVOD platforms sometimes offer programmes in preview and even allow to binge watch further episodes after the first broadcast. This viewing can also be detected with the identifier.
It is also possible to watch live TV. This type of viewing takes 23% in the South and 19% of all online viewing in the North.
Preview is limited. Most viewing is in "on demand modus", on the time and place of the consumer. About 3 quarter of the recognised views is on demand.

Type of TV content in online modus



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

TOP 25 ONLINE VIEWING OF TV CONTENT IN 2023

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 sports events we see none of them in the North while the top is dominated with sports and especially F1 races in the South.

The other consumption mode is of course to watch a TV programme that was aired before on your own time and place, and watch it on the device you want. This is important in the North, while in the South we see only a few programs – sometime from smaller channels- popping up in the top.

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

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

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

The top ranking of programs takes into account viewing on the TV screen (up to 7 days after broadcast) AND viewing up to 28 days after broadcast + previewing.
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 live sports event 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. The complete top 100 for the North can be found on the CIM website.

In 2023 we do not have any football match in the top in the North, but we do have 4 cycling competitions with "De ronde van Vlaanderen" at nr8.

VTM tops the list with The Masked Singer a second year in a row.
VRT1 occupies 6 places in the top10 and PLAY4 is the runner up with 2 spots (none in the top10 in 2022).
On place 4 we have "Kastaars!", broadcasted in simulcast on VRT1, VTM and PLAY4.

As for the rest of the ranking, it is all VRT1 who ends up with 21 spots in the ranking.

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

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

The top ranking of programs takes into account viewing on the TV screen (up to 7 days after broadcast) AND viewing up to 28 days after broadcast + previewing.
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 live sports event is always considered a separate program.
This is the official top25 published by the CIM. 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 9 places in the Ranking. The matches against Sweden, Germany and Estonia on La Une make up the top 3 of 2023.

News, special editions and information programmes is the most popular other content, after the sports.

The French channel TF1 also appears once in the ranking, this time with a multi-artist show.

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

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

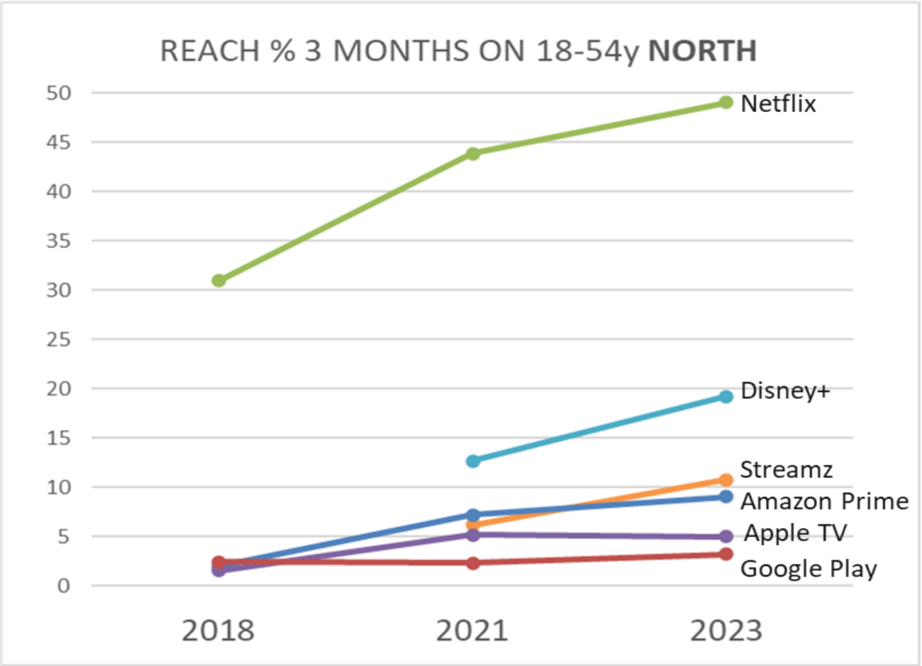
6. OTHER CONTENT

OTHER CONTENT – SCOPE OF THE STREAMING SERVICES IN THE NORTH

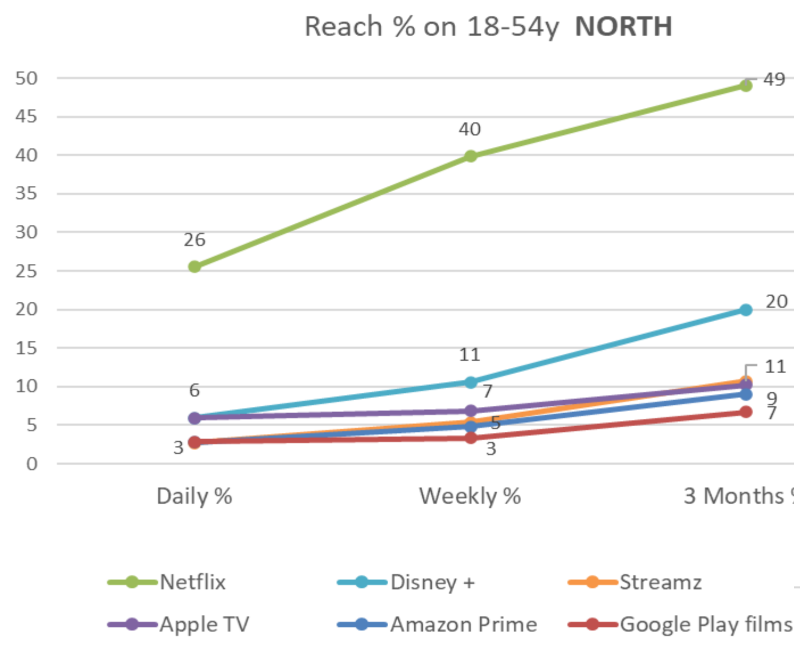
As shown before, the section "other screen use" of the TV screen has grown to considerable proportions. The actual measurement method does not allow to identify the platform, nor the volumes attached to it.
As these platforms have well know brand names, declarative surveys like Video Observer can give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

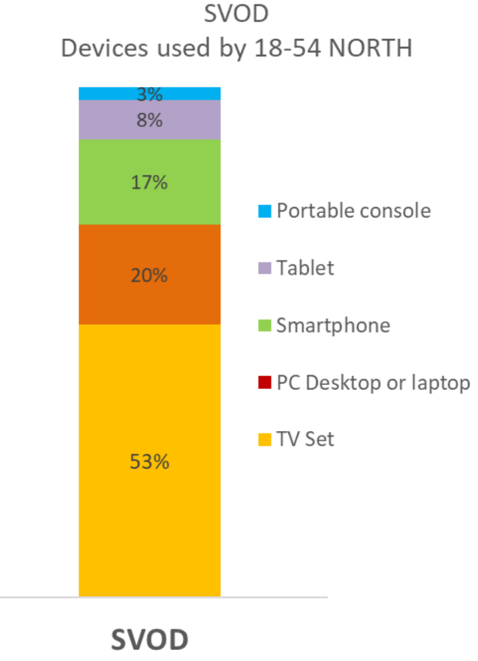
Overall we see a bigger adoption of the platforms in the North. Netflix is clearly the leader and continous to grow. Disney+ and Streamz are the other platforms that grow.
All screens are used to watch SVOD but the TV screen remains the most popular.

Evolution 2018 – 2021 - 2023



Potential reach and devices used in 2023





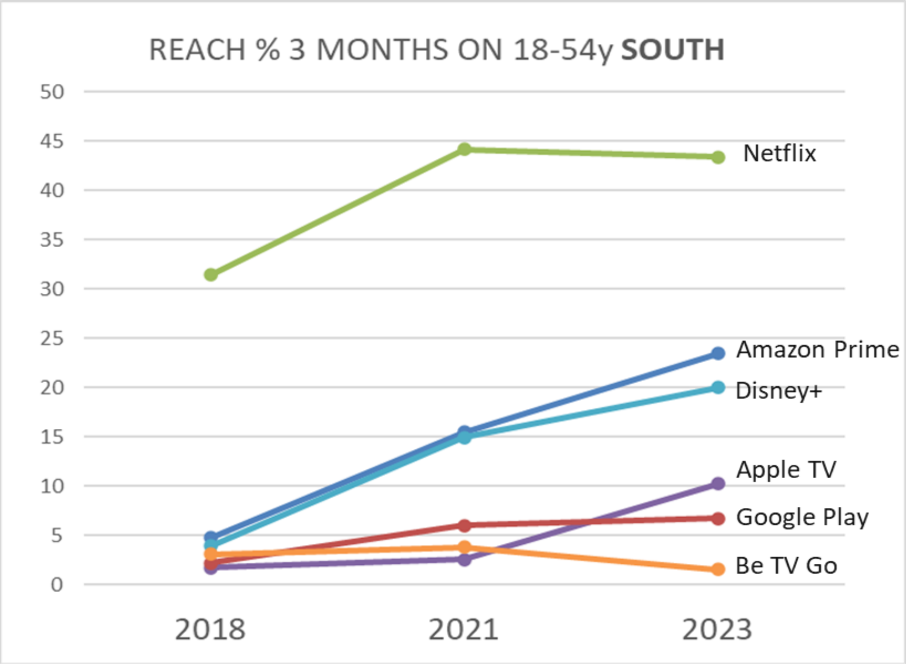
Source : Video Observer 2018, 2021 (IP Belgium), 2023 (RTL & VIA), 18-54y

OTHER CONTENT – SCOPE OF THE STREAMING SERVICES IN THE SOUTH

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 like Video Observer can give an idea of their relative importance.

Overall we see a more cluttered market in the South compared to the North. Amazon Prime is 2nd thanks to its FR language offer and influence from France.
Netflix is clearly the leader although it shows a decline in 2023. The other streamers are on the rise.
All screens are used to watch SVOD but other screens combined are more popular than the TV screen.

Evolution 2018 – 2021 - 2023



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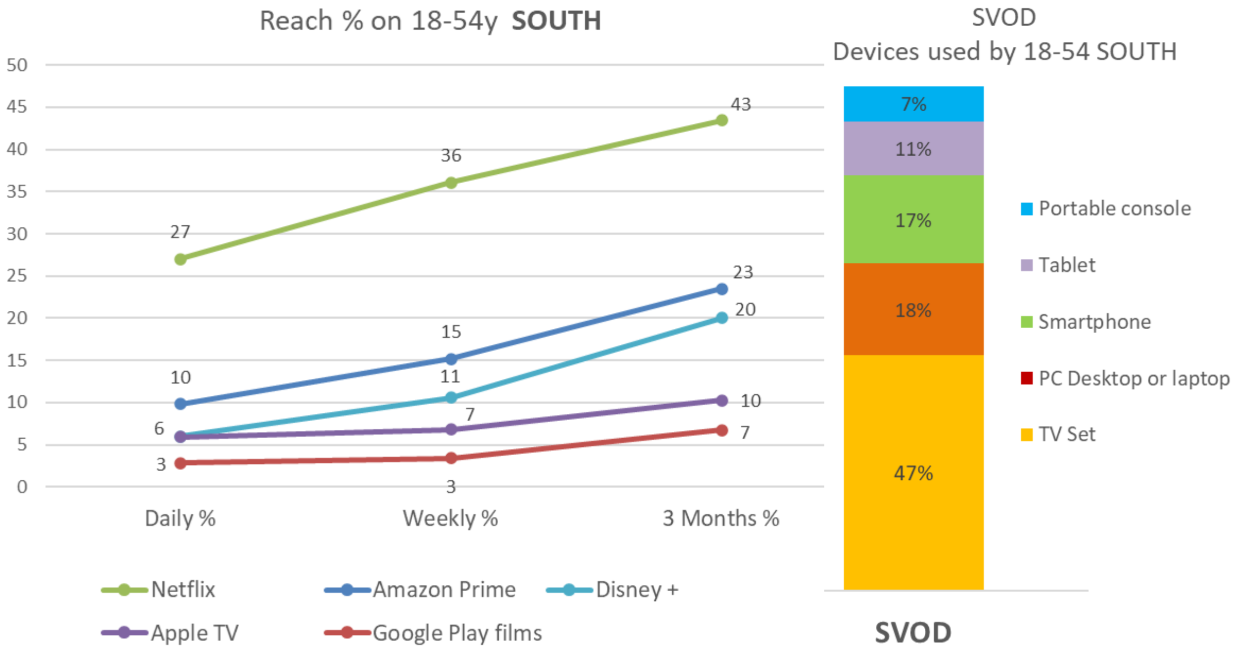

Source : Video Observer 2018, 2021 (IP Belgium), 2023 (RTL & VIA), 18-54y

VIA TV Report 2023

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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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