Association of AV Media

RADIO Report 2024

24

VIA RADIO Report 2024

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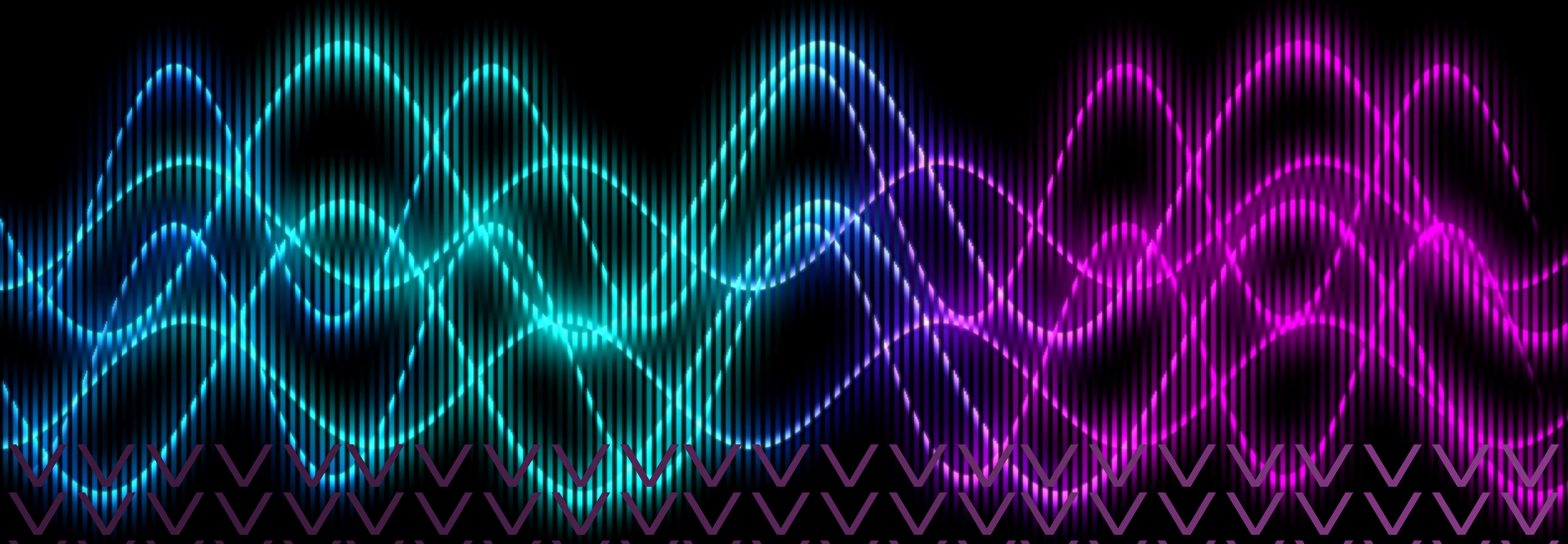


1. WHAT IS RADIO ?

What is Radio

The “CIM Audio Time” study measures the “share of ear” of the Belgian population and was conducted for the 5th time in Oct-Dec 2024. 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.

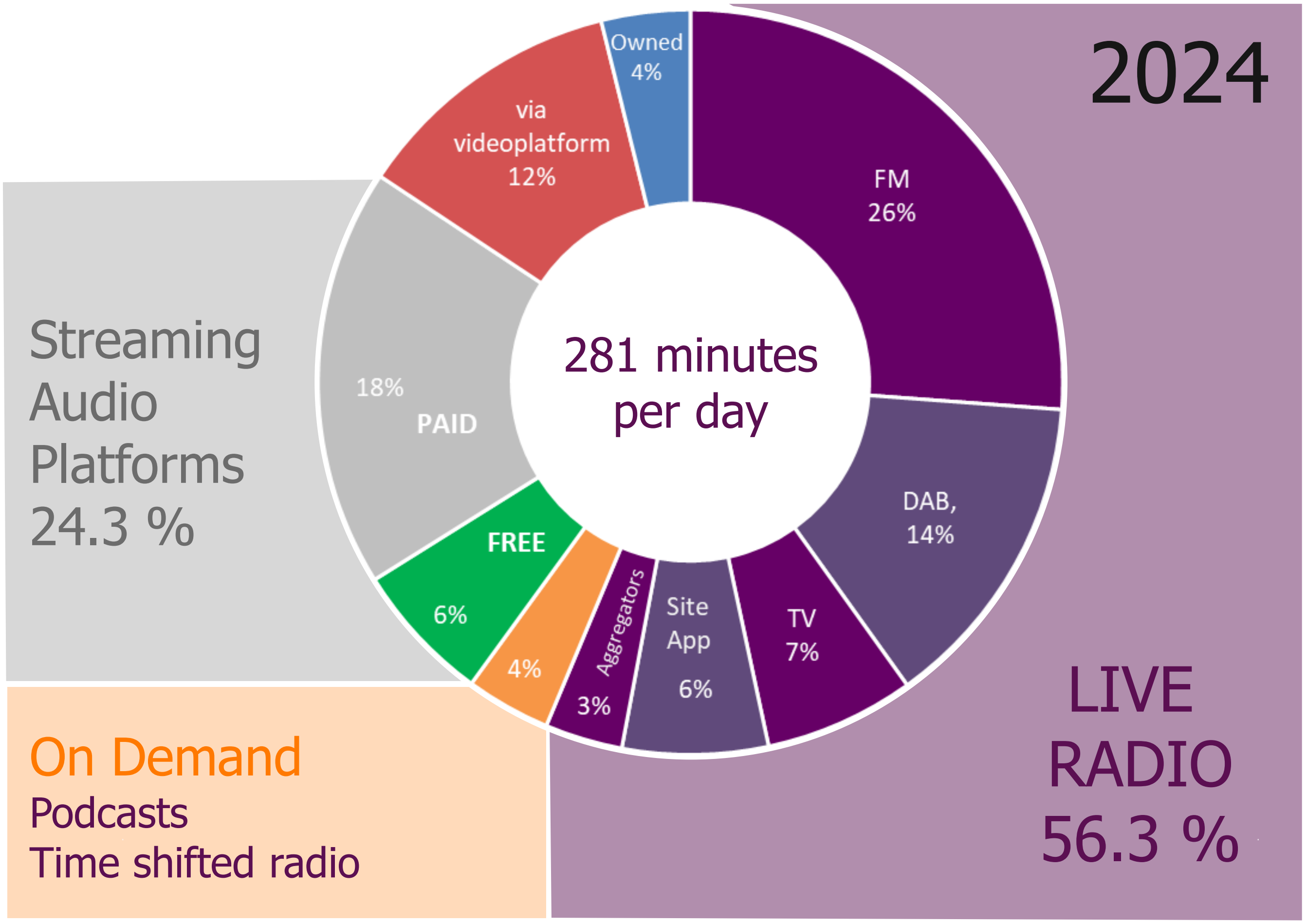
Radio is the biggest source of audio – with Live Radio in the lead and with limited “time shifted radio” – a new mode of consumption that is driven by podcasts.

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 on subscription without 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 66% of audio listening on 18-54y can be accessed for advertising purposes.

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



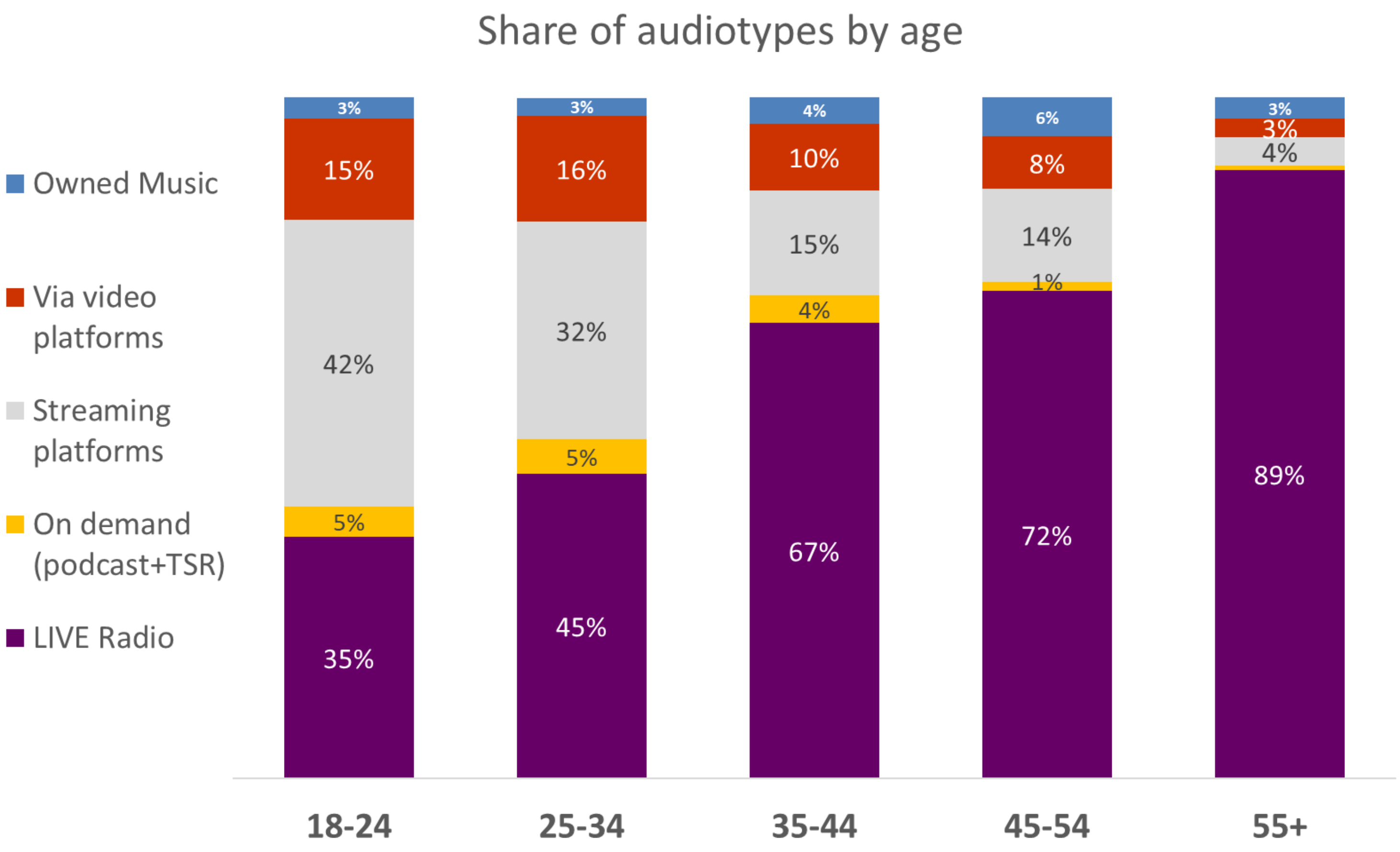
Source : CIM Audio Time 2024 (fieldwork in 2023), 18-54y

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.
With the rise of the smartphone, it has become very easy to listen ATAWAD (any time, any where, any device).

Starting 25+, live radio becomes the biggest audio source, growing with age.
Starting 35+, live radio is already 67% of all audio consumption and streaming platforms (audio & video) drop significantly.



Source : CIM Audio Time 2025

2. 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.

The average spotlenght has again decreased to 18.3 seconds and is slightly lower than in TV.

The number of spots has increased (again) in 2024 in the North but also total GRP (1 GRP = 1% of the target) has risen resulting in a stable GRP per spot.

In the South there is an increase in number of spots and GRP. As the increase in GRP was bigger, the GRP per spot is slightly bigger in 2024 compared to the year before.

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Number of :	2019	2020	2021	2022	2023	2024	*Index vs 2023*
Advertisers	1 515	1 144	1 242	1 330	1 315	1 331	*101*
Brands	2 178	1 495	1 648	1 864	1 879	1 848	*98*
Spotlength (spots only)	19,5"	19,8"	19,9"	19,1"	18,7"	18,3"	*98*

North (spots only)

Number of channels	9	9	9	9	9	9	*100*
Spots	497 146	436 662	487 007	511 889	577,675	600,072	*104*
Spots/channel/day	151	133	148	156	176	182	*104*
GRP 18-54	1343 753	1117 554	1089 108	1057 835	998 450	1030 246	*103*
GRP per spot	2.7	2.6	2.2	2.1	1.7	1.7	*99*

South (spots only)

Number of channels	10	10	10	10	10	10	*100*
Spots	728 444	590 319	671 205	680 032	657,581	718,245	*109*
Spots/channel/day	200	161	184	186	180	196	*109*
GRP 18-54	809 579	625 484	688 543	690 293	582,470	640,502	*110*
GRP per spot	1.1	1.1	1.0	1.0	0.9	0.9	*101*

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

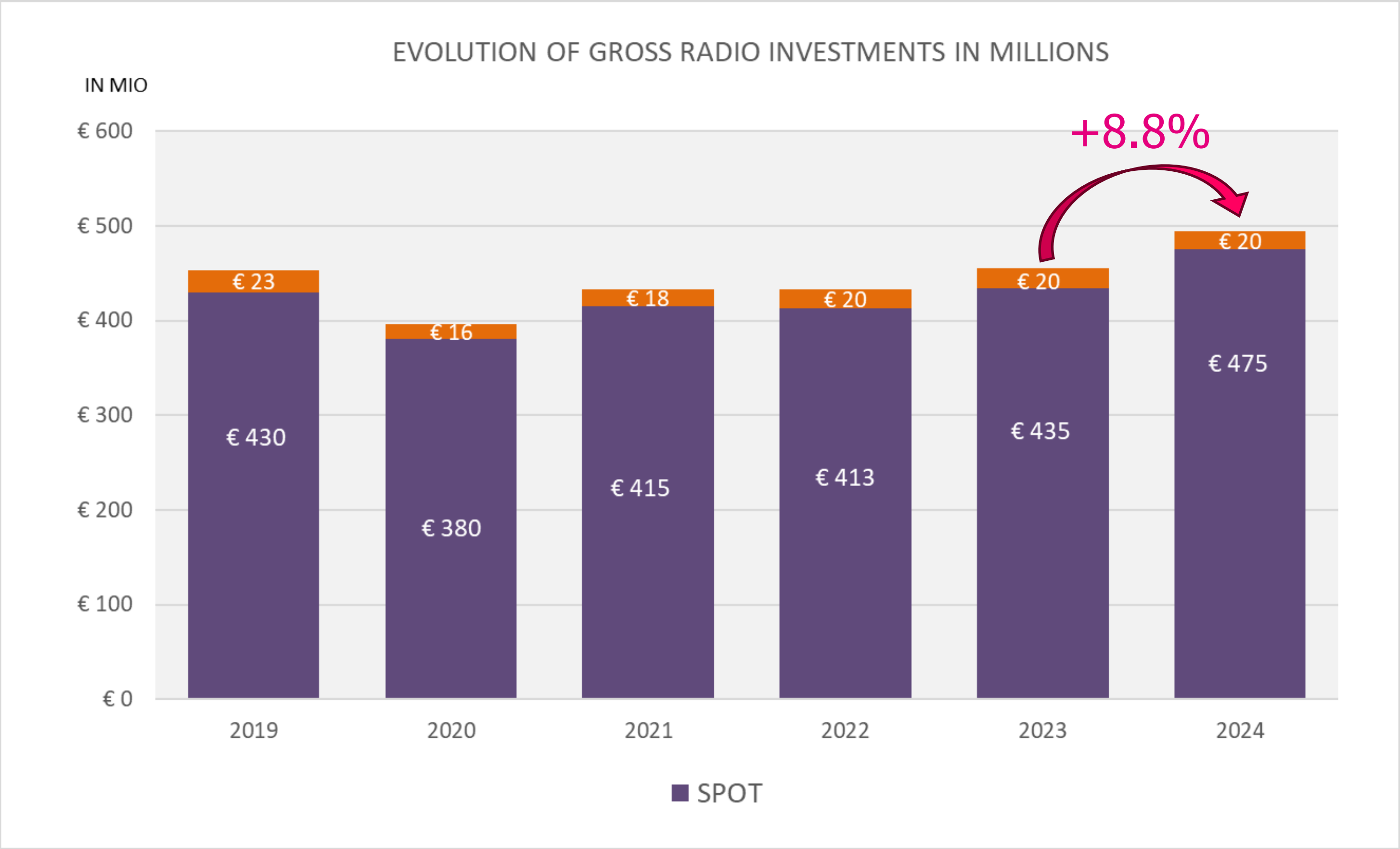
Radio gross investment

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

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 with 8.8% versus 2023 to 495 million euro gross.

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

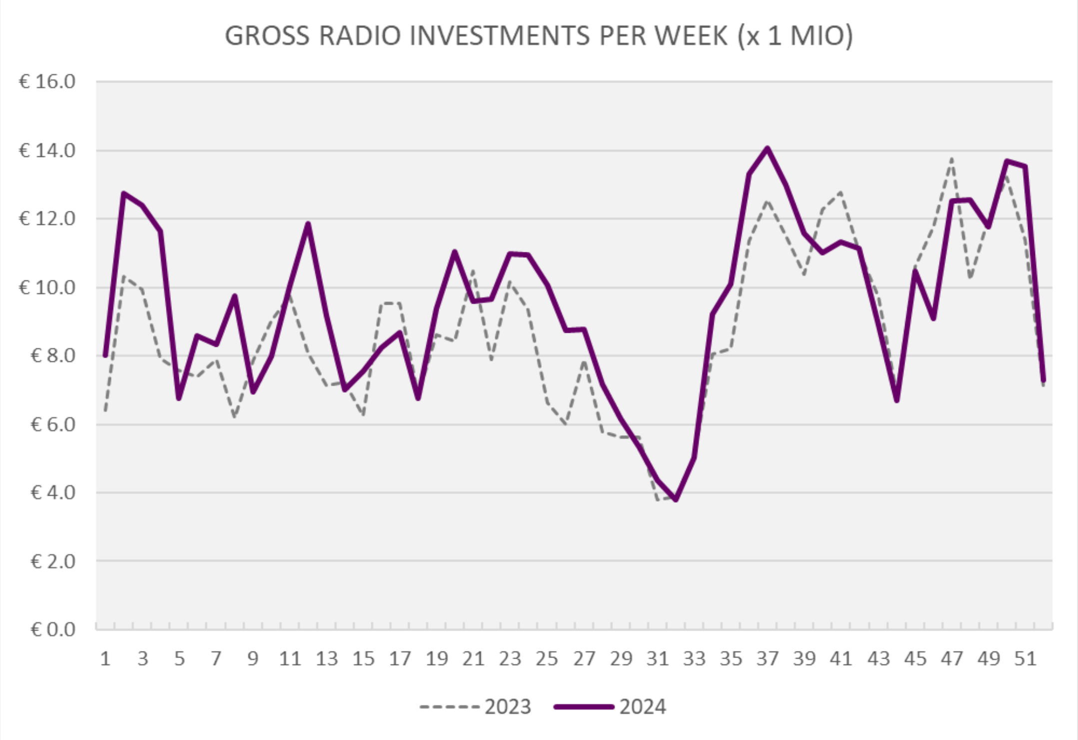


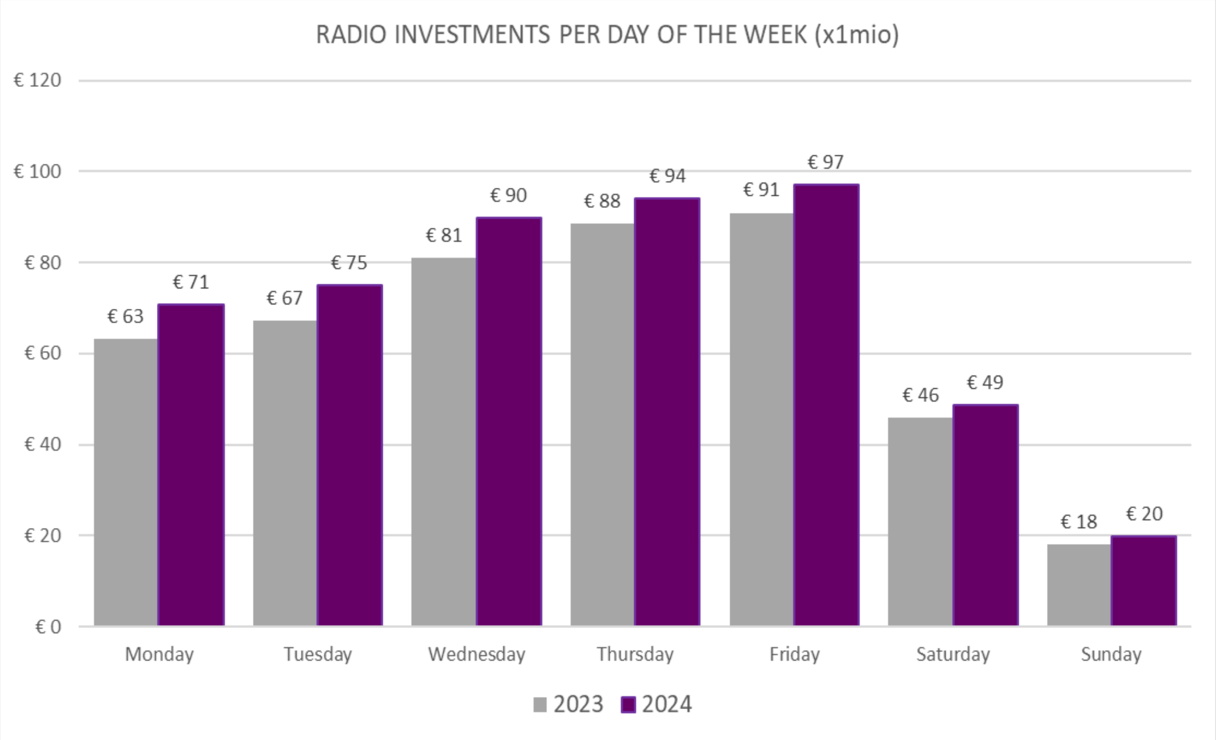
Source: Nielsen MDB – National. Excluded: (Associated) Manifestations/Shows, Fairs, Media/Publishers

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. An extra peak showed in April 2024. As campaigns tend to be short the variations between weeks can be quite high.
There is little variation in seasonality in 2024 compared to 2023. 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 weekend peak 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 percieved 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 2024 and was once more an important driver of overall growth.

Transport – the car sector – is the biggest grower in 2024 and is again at pre-pandemic level. The Culture/Tourism sector is a slow but steady grower.

On the downside, we see a a small decline of the services sector that includes finance, telecom and the smaller sectors.

Economical group (in mio)	**2020**	**2021**	**2022**	**2023**	**2024**	*index vs 2023*
DISTRIBUTION	€ 133.6	€ 155.5	€ 172.2	€ 182.0	€ 199.1	*109*
	34%	36%	40%	40%	40%	
SERVICES incl. FINANCE	€ 81.4	€ 93.6	€ 83.7	€ 78.1	€ 77.1	*99*
TRANSPORT	€ 51.6	€ 51.9	€ 46.0	€ 54.9	€ 76.1	*139*
CULTURE, TOURISM, FREE TIME, SPORTS	€ 23.8	€ 33.7	€ 41.7	€ 45.9	€ 49.3	*107*
TELECOM	€ 32.8	€ 31.8	€ 32.2	€ 34.6	€ 33.8	*98*
HOME IMPROVEMENT	€ 27.8	€ 34.3	€ 31.5	€ 29.2	€ 30.0	*103*
FOOD	€ 15.2	€ 10.2	€ 10.8	€ 11.5	€ 12.0	*104*
ENERGY - FUEL	€ 19.3	€ 13.1	€ 7.0	€ 11.4	€ 11.9	*104*
HEALTH - WELLNESS	€ 8.9	€ 5.6	€ 5.6	€ 4.8	€ 2.9	*61*
CLOTHES - ACCESSOIRES	€ 0.1	€ 0.7	€ 1.0	€ 1.0	€ 1.0	*96*
BEAUTY - HYGIENE	€ 1.2	€ 2.6	€ 1.5	€ 1.2	€ 0.9	*73*
OTHER	€ 0.0	€ 0.2	€ 0.3	€ 0.2	€ 0.6	*316*
TOTAL	**€ 396**	**€ 433**	**€ 434**	**€ 455**	**€ 495**	**109**

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

Gross Radio investments – top 25 by advertisers

The ranking 2024 has 9 newcomees, that have increased their spend in a significant way, with Amazon being the topper. Overall only 4 advertisers have a lower spend versus 2023.

The car sector is very present (again) in the list, with again an impressive growth for d'Ieteren, who spends now 5x the investment of 2 years ago! On top of that there is the come back of Peugeot, Citroen, Daimler and BMW.

The supermarket sector is topping the list with Colruyt and Aldi (that switch positions) but overall this sector is rather stable.

Also telecom brands Proximus, Orange and Telenet are rather flat, with the exception of VOO that dropped out of the list.

Non-food distribution shows different directions, with impressive growth for Ikea and FNAC, limited growth for AS Watson (AS Adventure), Brico, Bol.com and Krefel.

Overall the top 25 takes 42% of all investments into account.

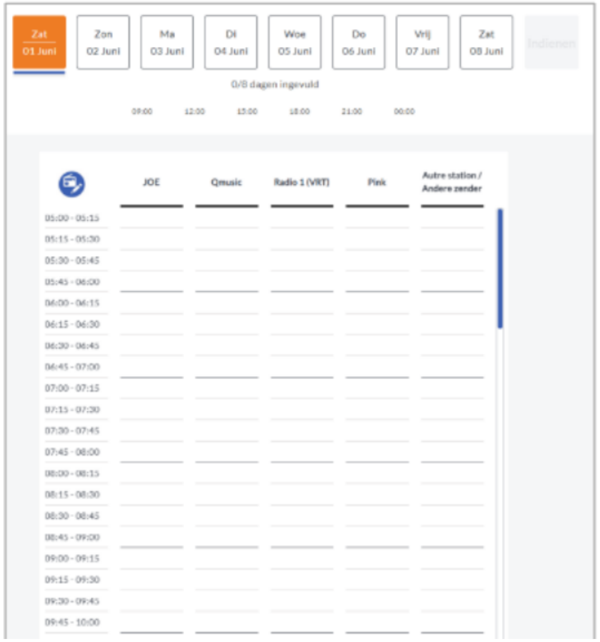
	Advertiser (in mio)	2022	2023	2024	*index vs 2023*
1	COLRUYT	€ 14.1	€ 17.3	€ 19.8	*114*
2	ALDI	€ 17.0	€ 18.6	€ 16.7	*90*
3	D'IETEREN AUTO	€ 3.3	€ 8.6	€ 16.4	*192*
4	LOTERIE NATIONALE	€ 13.6	€ 15.6	€ 16.4	*105*
5	PROXIMUS	€ 8.8	€ 11.1	€ 11.9	*107*
6	ORANGE	€ 8.0	€ 9.2	€ 10.9	*119*
7	DELHAIZE	€ 7.3	€ 10.4	€ 10.5	*101*
8	CARREFOUR	€ 9.6	€ 8.4	€ 9.6	*114*
9	AS WATSON	€ 7.9	€ 8.4	€ 8.8	*104*
10	AMAZON FRANCE	€ 0.6	€ 1.3	€ 8.1	*601*
11	IKEA BELGIUM	€ 2.8	€ 3.1	€ 7.6	*246*
12	LIDL & CO	€ 13.8	€ 7.3	€ 7.4	*102*
13	BOL.COM	€ 3.9	€ 5.6	€ 5.7	*103*
14	PEUGEOT BELGIQUE-LUXEMBOURG	€ 2.4	€ 2.3	€ 5.4	*238*
15	DAIMLER BENZ GROUP	€ 2.7	€ 1.8	€ 5.2	*292*
16	FNAC VANDEN BORRE	€ 3.2	€ 3.0	€ 5.1	*169*
17	CITROEN BELUX	€ 2.7	€ 2.8	€ 5.1	*186*
18	VLAAMSE GEMEENSCHAP	€ 4.9	€ 5.9	€ 4.8	*81*
19	BRICO INTERNATIONAL	€ 3.7	€ 3.9	€ 4.5	*116*
20	BMW BELGIUM	€ 3.5	€ 3.7	€ 4.5	*119*
21	TOYOTA BELGIUM	€ 4.7	€ 4.9	€ 4.4	*90*
22	CRELAN	€ 2.0	€ 2.8	€ 4.4	*158*
23	TELENET OPERATIES	€ 5.1	€ 4.8	€ 4.4	*91*
24	KREFEL	€ 4.9	€ 4.2	€ 4.3	*101*
25	IMPERMO	€ 3.6	€ 3.2	€ 4.2	*129*
	TOTAL TOP25	€ 154	€ 168	€ 206	
	% of total spend in radio	36%	37%	42%	

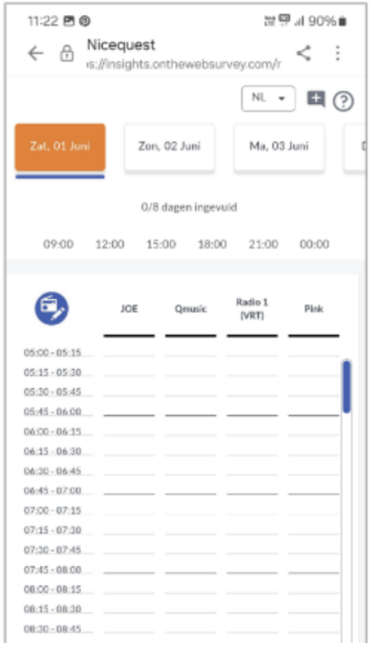
Source: Nielsen MDB – National. Excluded: (Associated) Manifestations/Shows, Fairs, Media/Publishers

3. LISTENING TO RADIO (on all devices)

RADIO MEASUREMENT

Radio is measured in Belgium in the CIM RAM study, with the use of diaries. People are asked to write down, quarter by quarter, what they have been listening to during a full week. All info on www.cim.be.
While the fieldwork is nearly continuous, the publications happen in “waves”. Normally 3 waves per year: January-April, May-August and September-December (exception : first wave of 2021 was limited to March-june due to covid).
In the tables produced on the following slides, we refer to the field periods 1, 2 and 3 per year.





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.

Connections
Sum of started sessions of min. 2 sec, calculated for the chosen period.

```
SELECT SUM (ID) FROM UserSessions WHERE Duration >= 2 AND Start BETWEEN
@PERIODSTART AND @PERIODEND
```

Active sessions
Sum of started sessions of min. 60 sec, calculated for the chosen period.

```
SELECT SUM(ID) FROM UserSessions WHERE DURATION >= 60 AND Start BETWEEN
@PERIODSTART AND @PERIODEND
```

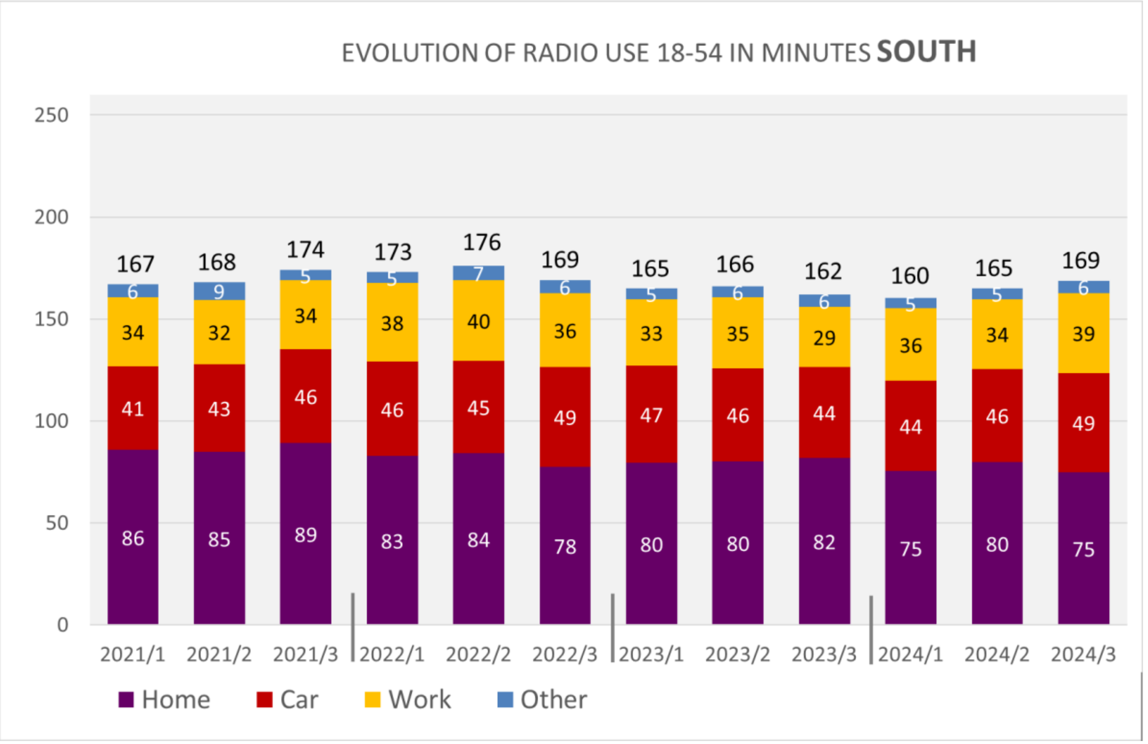
Sessions
Sum of started sessions of min. 600 sec, calculated for the chosen period.

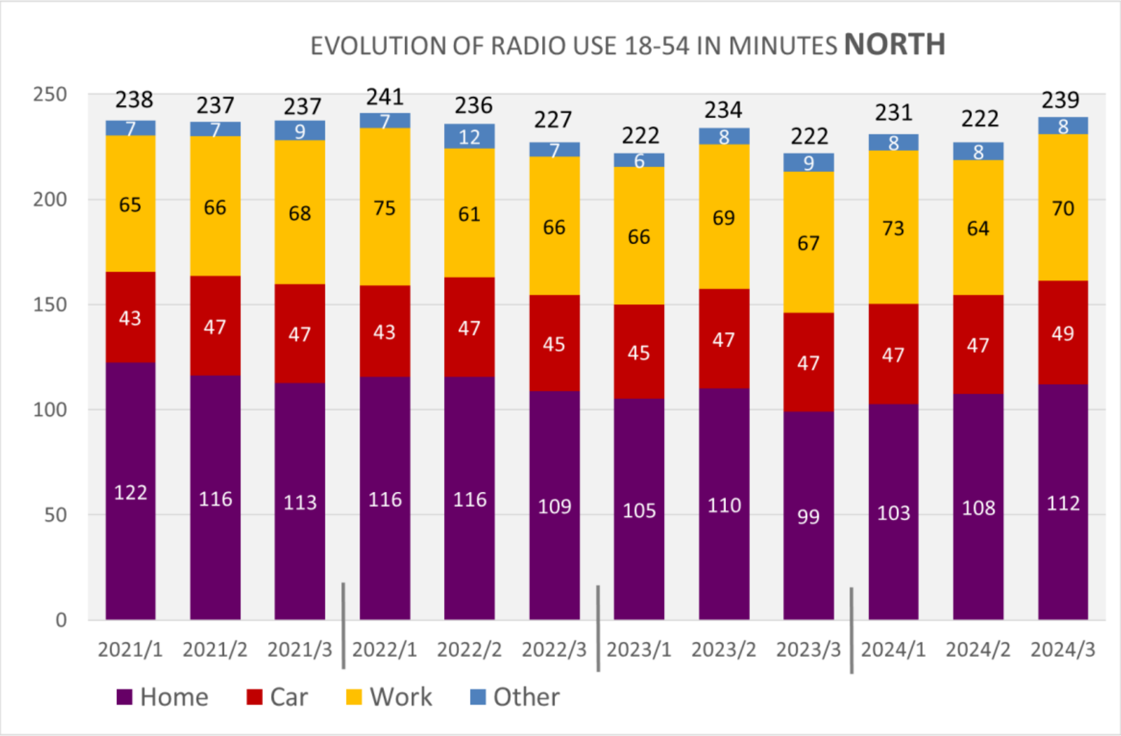
```
SELECT SUM (ID) FROM UserSessions WHERE Duration >= 600 AND Start
BETWEEN @PERIODSTART AND @PERIODEND
```

▶ EVOLUTION OF RADIO LISTENING (WITH SPLIT BY LOCATION)

The consumption of radio has always been lower in the South versus the North. Inhome and listening-at-work 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 2024 together and compared to 2023 there was growth in both regions : plus 6 minutes in the North to 232 minutes and plus 1 minute in the South to 165 minutes.



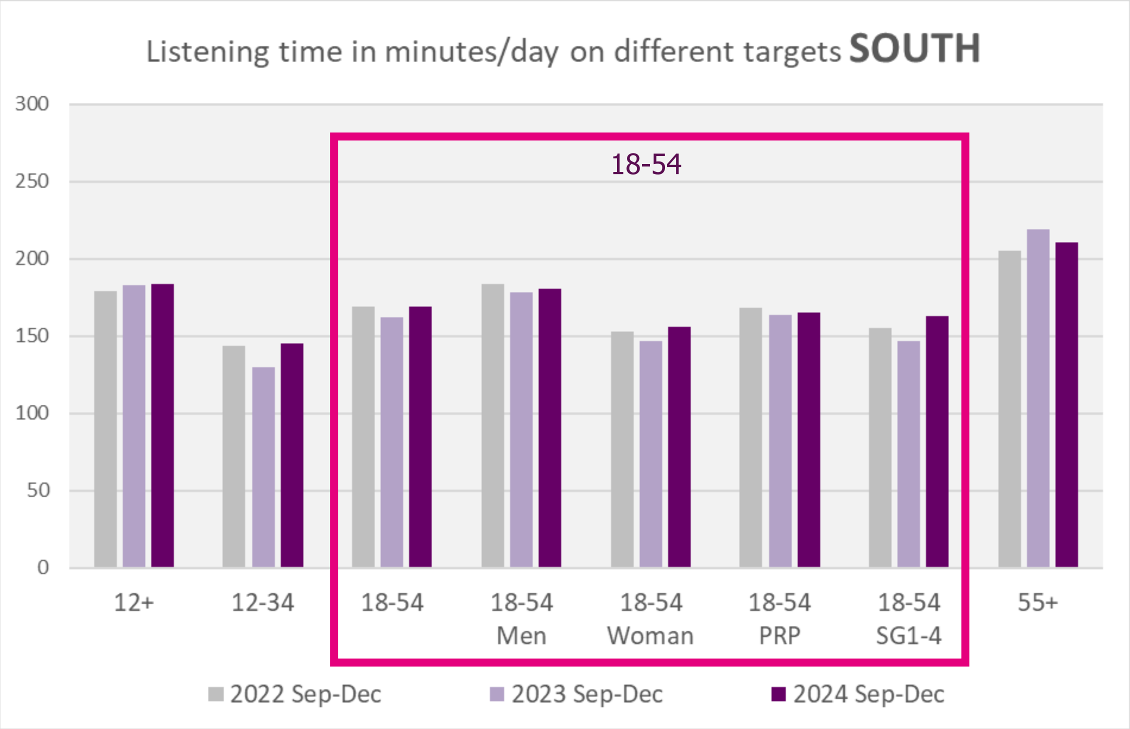


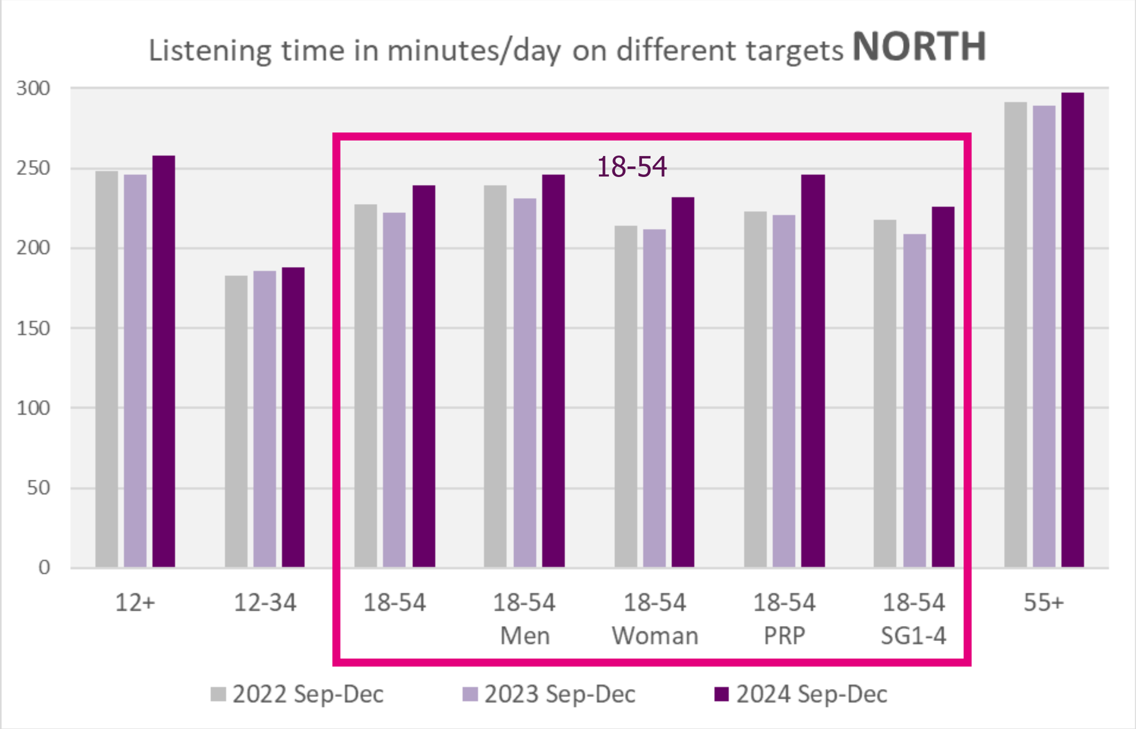
CIM RAM, Mon-Sun, 05-00h, Total radio, 18-54

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 2024 was overall stronger in both North and South. 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 close to 2.5 hours, while in the North it rises to more than 3 hours a day !





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

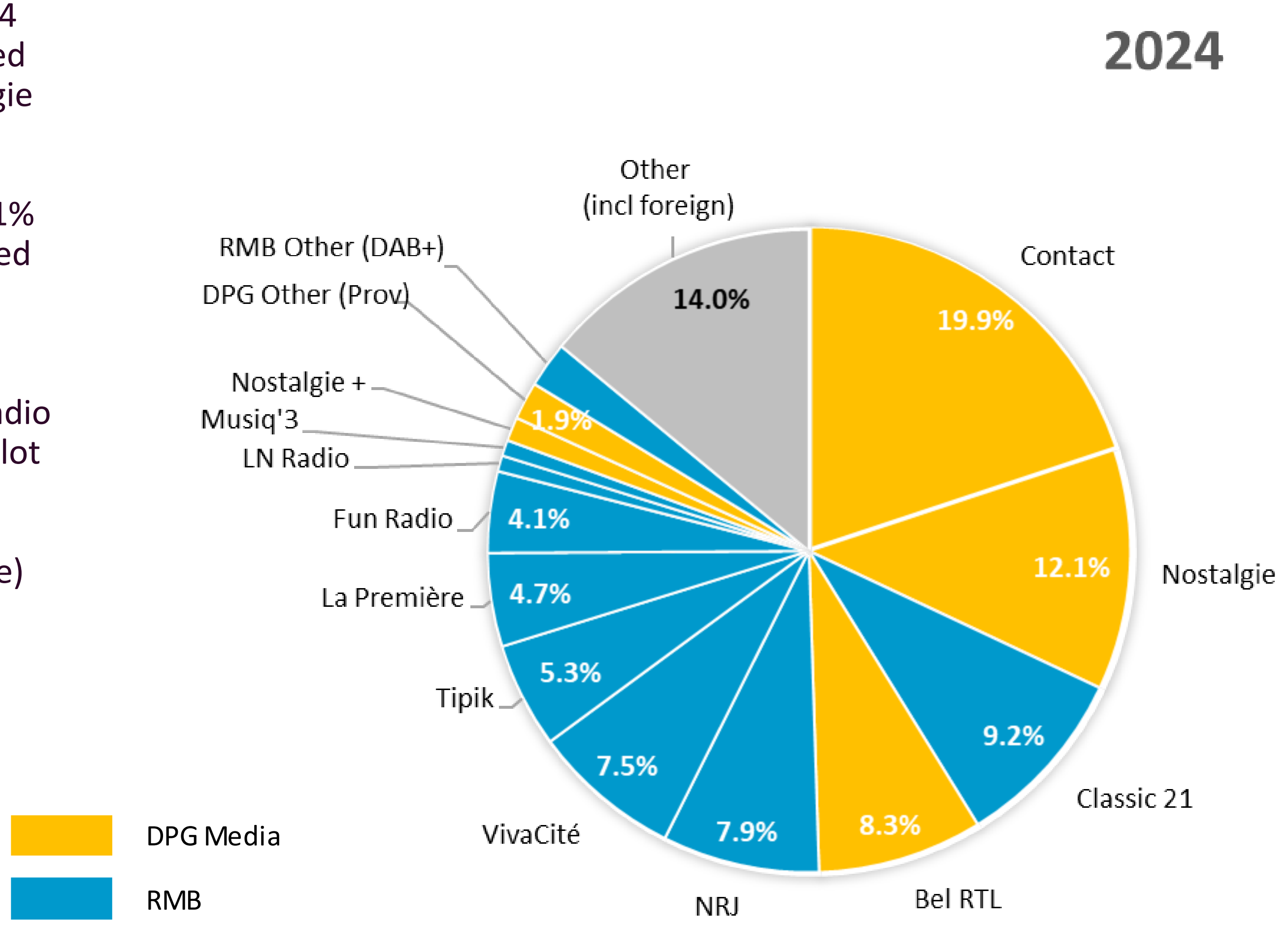
MARKETSHARES 18-54 SOUTH

In radio, every station has a specific profile. When producing marketshares we need to choose a target and that is 18-54 in this report. This has 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 (once more) strengthened its position in 2024 while Nostalgie showed the biggest drop.

All channels that have less than 1% marketshare (in 2024) 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.



All year	Evolution 2024 vs 2023
Contact	+ 1.0
Nostalgie	- 0.5
Classic 21	- 0.1
Bel RTL	+ 0.0
NRJ	- 0.3
VivaCité	+ 0.1
Tipik (RTBF)	- 0.3
La Première	+ 0.3
Fun Radio	+ 0.0
LN Radio	+ 0.0
Musiq'3	+ 0.2
Nostalgie +	+ 0.2
DPG Other (Prov)	- 1.1
RMB Other (DAB+)	+ 0.1
Other(incl foreign)	+ 0.4

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

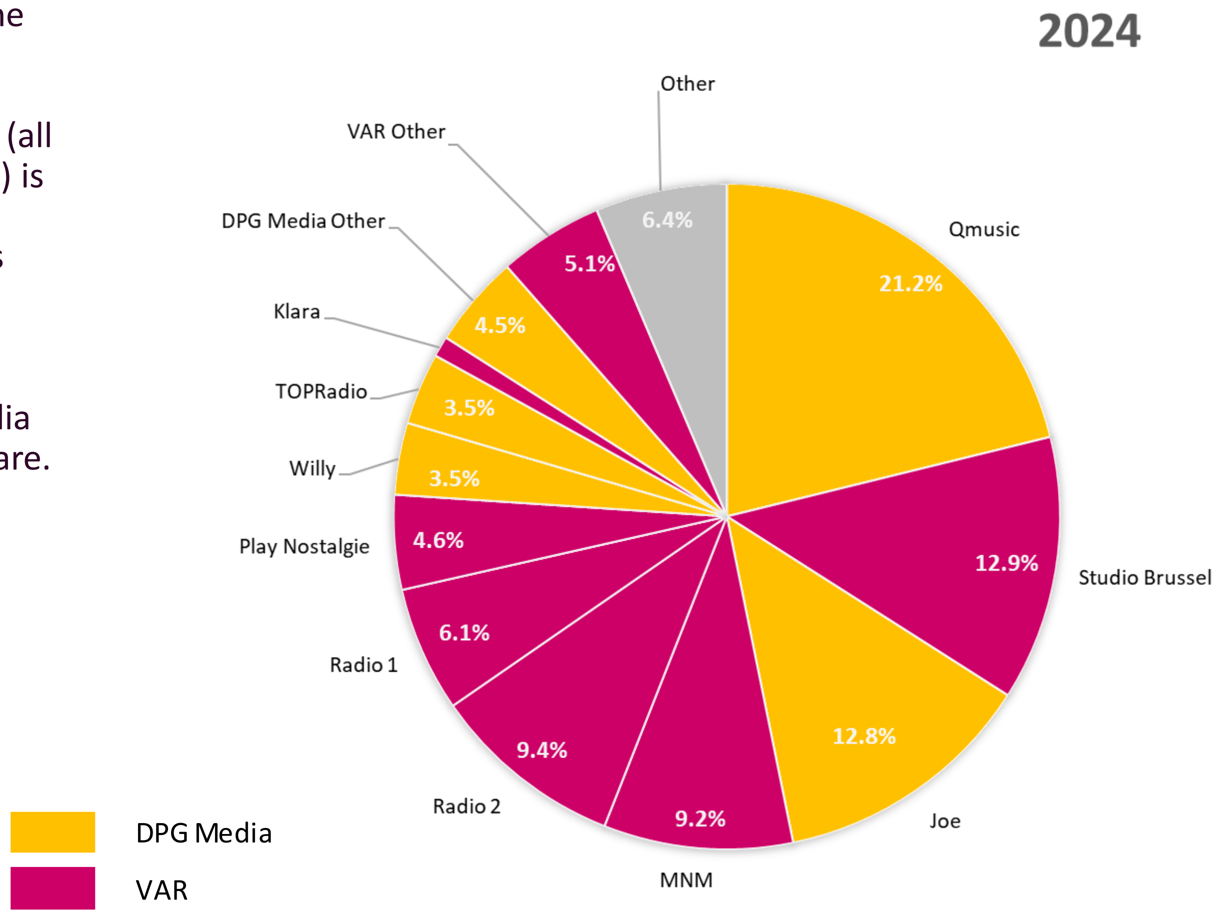
MARKETSHARES 18-54 NORTH

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

Qmusic is market leader on 18-54. Radio2 and Topradio showed the highest growth.

The long tail with “other radio” (all stations below 1% marketshare) is more important in the North. On the other hand, there is less listening to small regional and foreign stations.

Overall VAR (red) and DPG Media (orange) have a comparable share.



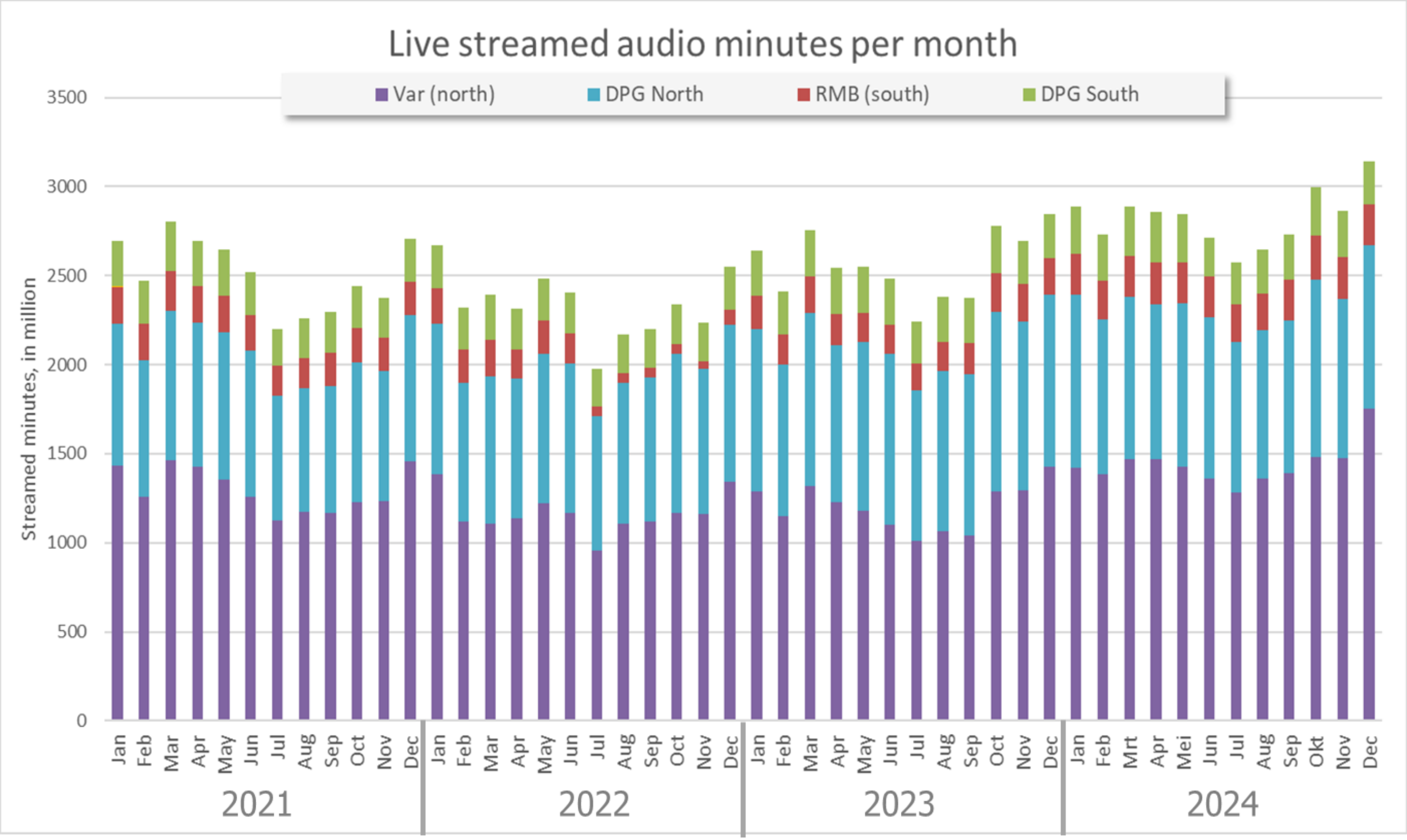
Total year	Evolution 2024 vs 2023
Qmusic	- 0.6
Studio Brussel	- 0.5
Joe	- 0.2
MNM	- 0.6
Radio 2	+ 0.6
Radio 1	+ 0.2
Play Nostalgie	- 1.2
Willy	+ 0.3
TOPRadio	+ 0.6
Klara	+ 0.1
DPG Media other DAB+	+ 0.2
VAR other DAB+	+ 0.7
Other (incl foreign)	+ 0.4

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). Also podcasts with specific content, for example from radio stations or news sites gain importance.

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: 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.



SalesHou	Radio Station	#subradios
DPG Media (south)	Bel RTL	12
	Chérie FM	11
	Mint	1
	Nostalgie (FR)	24
	Radio Contact	11
	Fun Radio Belgique	1
RMB (south)	Classic 21 (RTBF)	13
	jam.	1
	La Première (RTBF)	2
	Musiq'3 (RTBF)	4
	RTBF MIX	1
	RTBF Ukraine	1
	Tarmac	1
	Tipik (RTBF)	3
	VivaCité (RTBF)	16
	LN Radio	9
	Fun Radio Belgique	1
	NRJ	17
DPG Media (north)	Joe	8
	One World Radio	1
	Qmusic	9
	TOPradio	11
	WILLY	2
	Nostalgie (NL)	9
	NRJ Vlaanderen	1
Var (north)	Ketnet Radio (VRT)	1
	Klara (VRT)	3
	MNM (VRT)	4
	One World Radio	1
	Radio 1 (VRT)	3
	Radio 2 (VRT)	9
	Studio Brussel (VRT)	7
	VRT others (VRT)	1
	Nostalgie (NL)	9
	NRJ Vlaanderen	1
	Grand Total	209

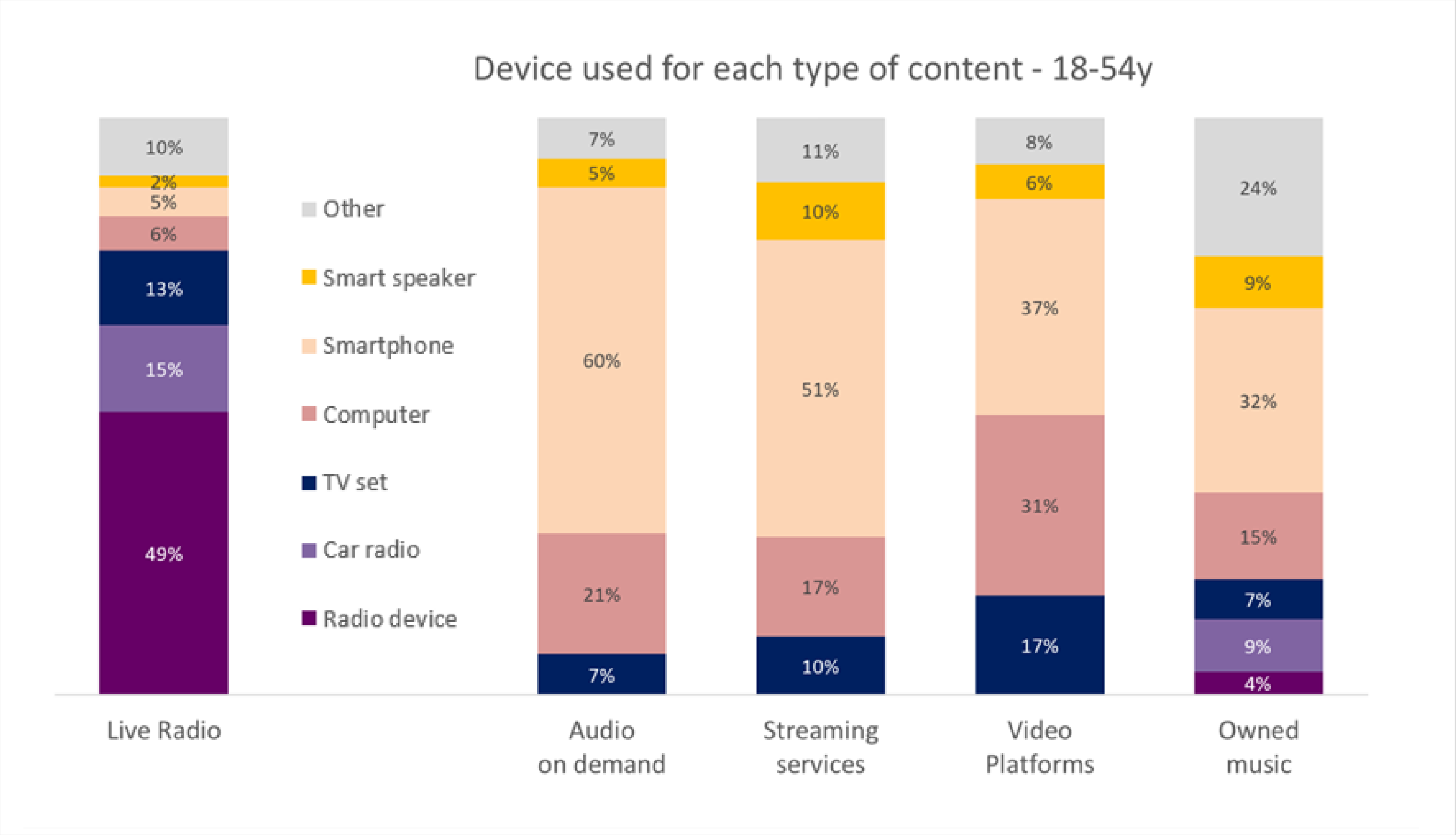
4. LISTENING TO OTHER CONTENT

WHAT TYPE OF DEVICE IS USED TO LISTEN TO CONTENT IN 2024

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 more than half 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.



Source : CIM Audio Time 2025 (fieldwork in 2024), on target 18-54

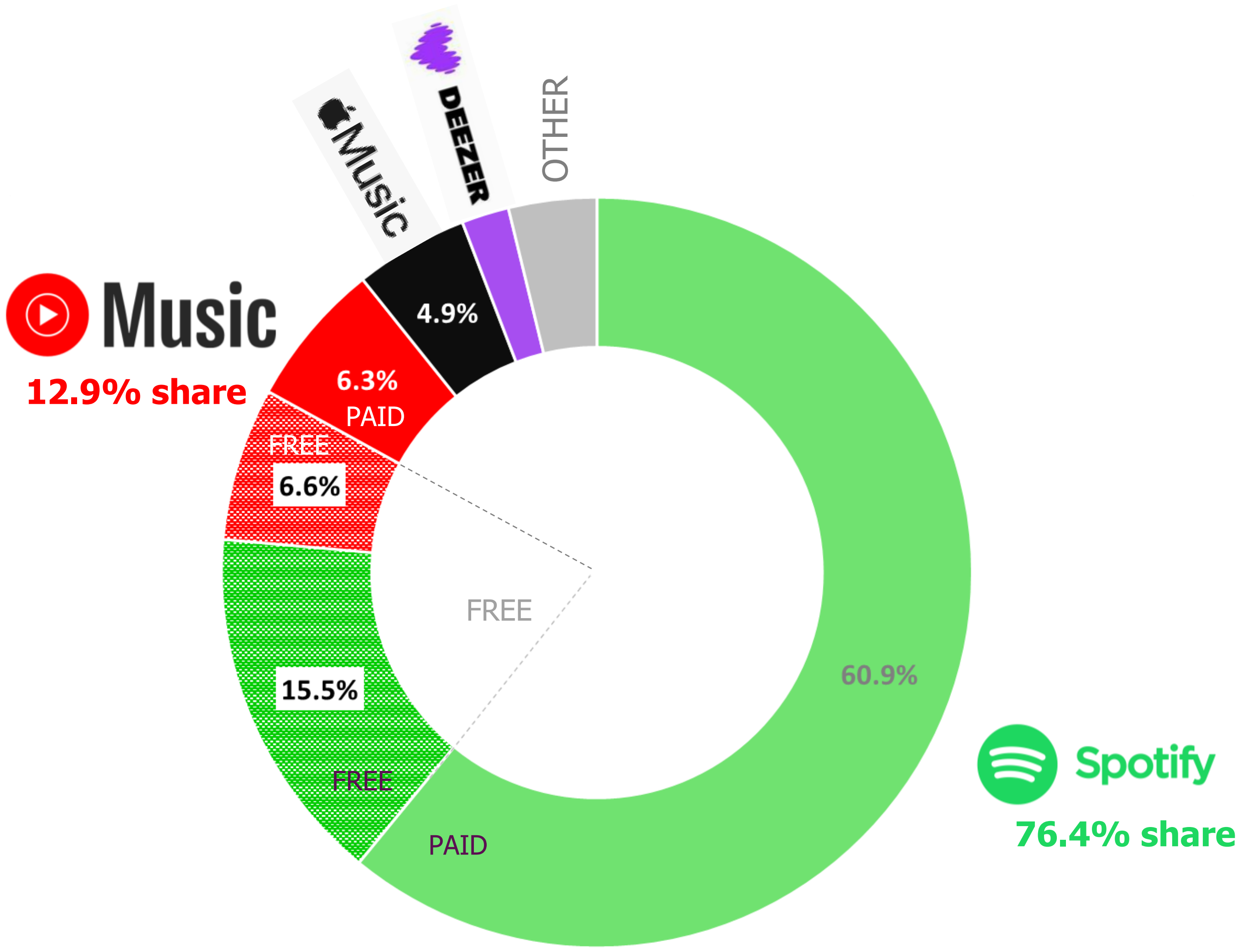
MUSIC STREAMING PLATFORMS ON 18-54y in 2023

CIM Audio Time has also asked about the brands of music streaming platforms that people use, and if they do so via subscription or for free.

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 2024.

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

Less than a quarter of the volume of music streaming services is available to advertise. This of course limits the opportunities of this new way of listening.



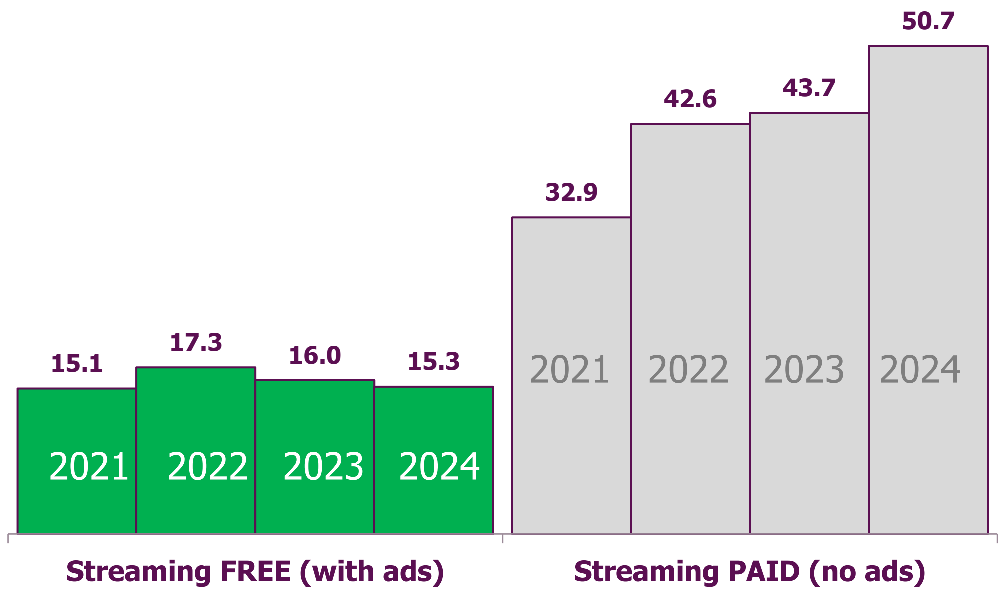
Source : CIM Audio Time 2025 (fieldwork in 2024), on target 18-54

▶ Streaming platforms : evolution FREE versus PAID on 18-54y

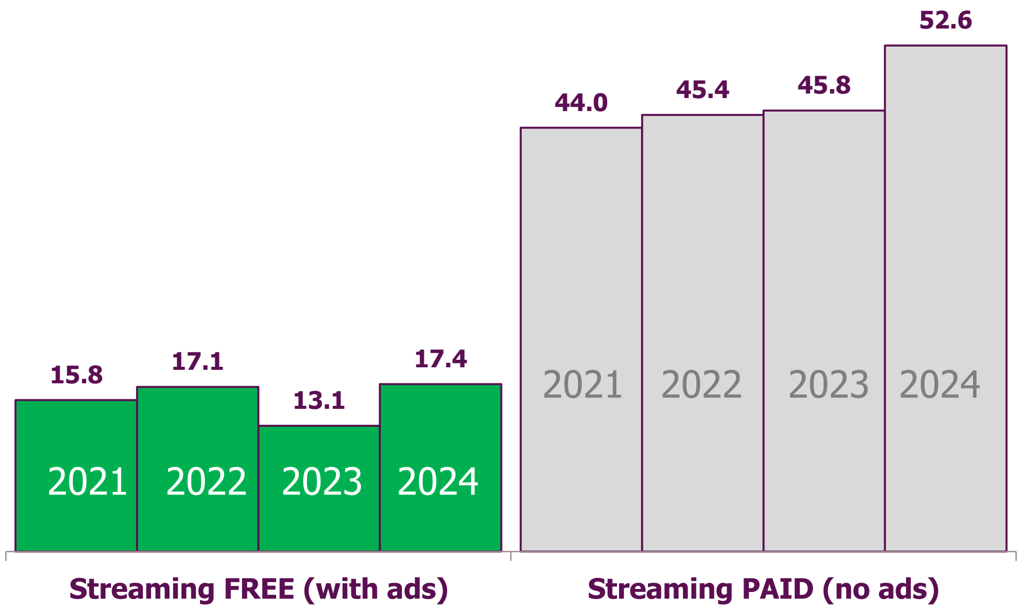
When discussing the merites of the streaming platforms for advertising we need to seperate the users that listen for FREE and accept advertising versus those who pay to avoid advertising.
The extra reach that streaming platforms can add to a radio plan only depend on FREE users, so we should isolate them to get a proper view.

It is interesting to see that the growing volume of music streaming is due to the rise of PAID subcriptions, rather than the FREE use.
This might have to do with the overload of advertising that incentivates people to switch to the paid subscription.

Minutes 18-54 SOUTH



Minutes 18-54 NORTH

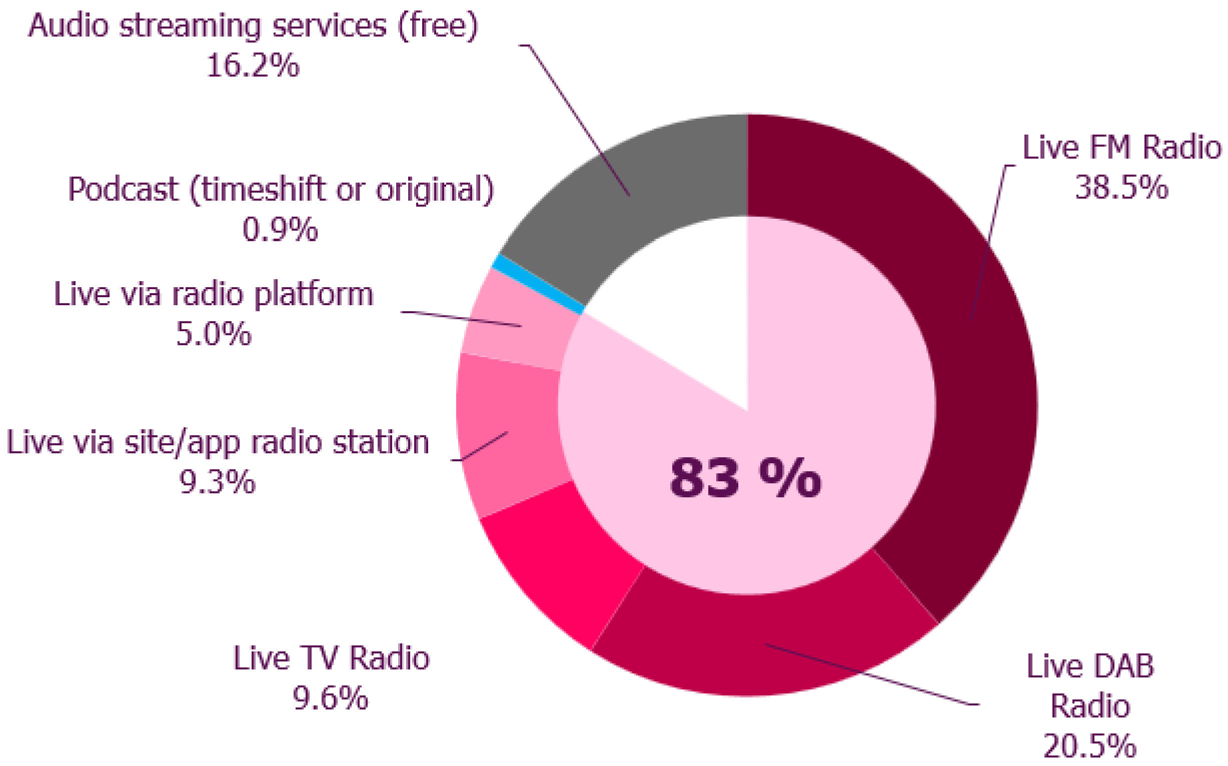


Source : CIM Audio on target 18-54. FREE volume contains Spotify, You Tube Music, Deezer and Soundcloud

5. TOTAL AUDIO ADVERTISING

▶ Share of advertising

In Belgium, 83% of all audio ads are delivered by Radio broadcasters

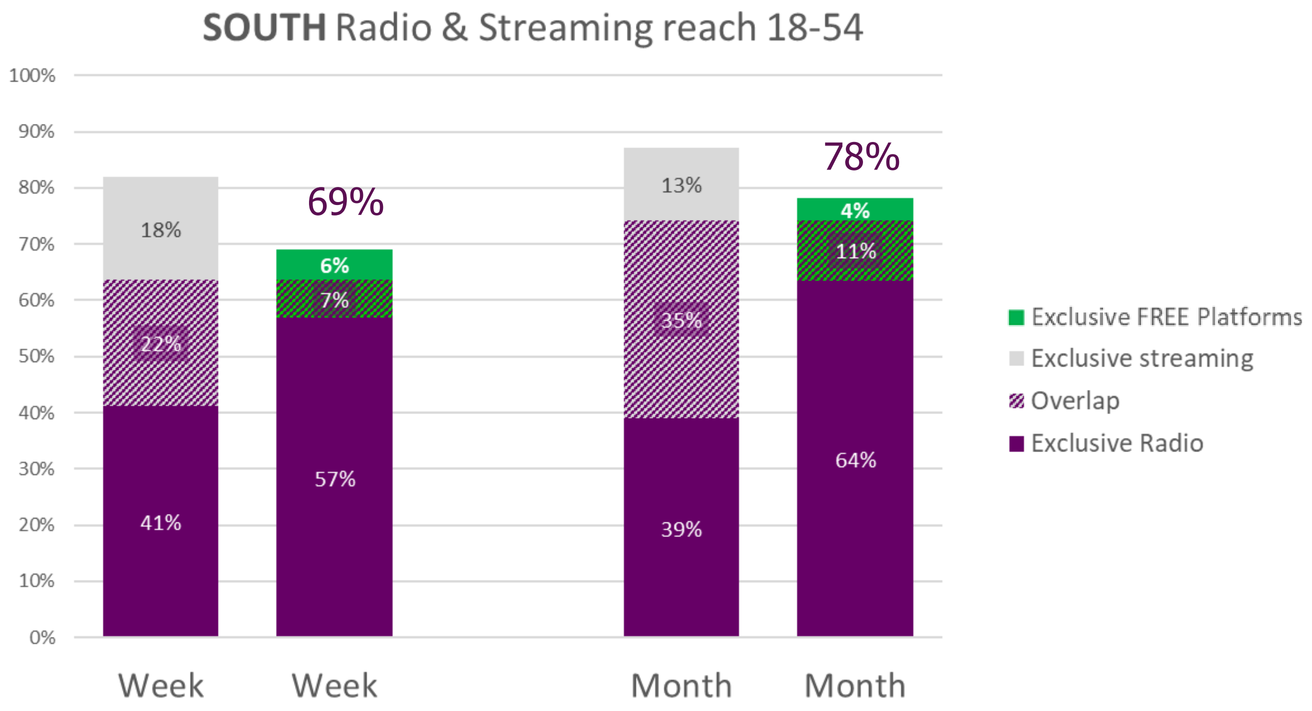


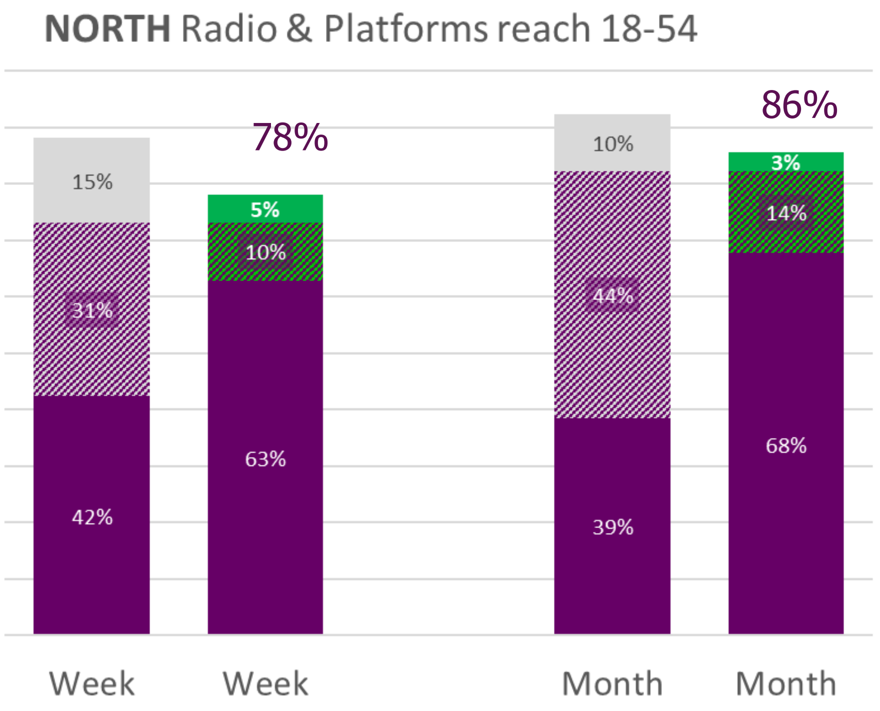
Sources : CIM Audio Time 2025 – Target 18-54 – Estimation advertising share: CIM RAM Sept23 -Aug24 – For Audio Streaming and Podcasts: VIA estimates. Info on thinkvia.be

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

CIM Audiotime allows to calculate the weekly/monthly reach of radio and streaming platforms, and the overlap of people that use both. And we can isolate the FREE users (that get advertising) in the total Streaming reach.
Hypothesis: the % of FREE users is the same in the category Exclusive streaming versus the category Overlappers (those that use both Radio and Streaming)

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 the incremental reach as FREE users of platforms might be more than expected also radio listeners.





Source : CIM Audio Time 2025 (fieldwork in 2024), on target 18-54

VIA RADIO Report 2024

www.thinkvia.be

VIA
Association
of AV Media

ABOUT VIA

VIA Association of AV Media

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

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

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