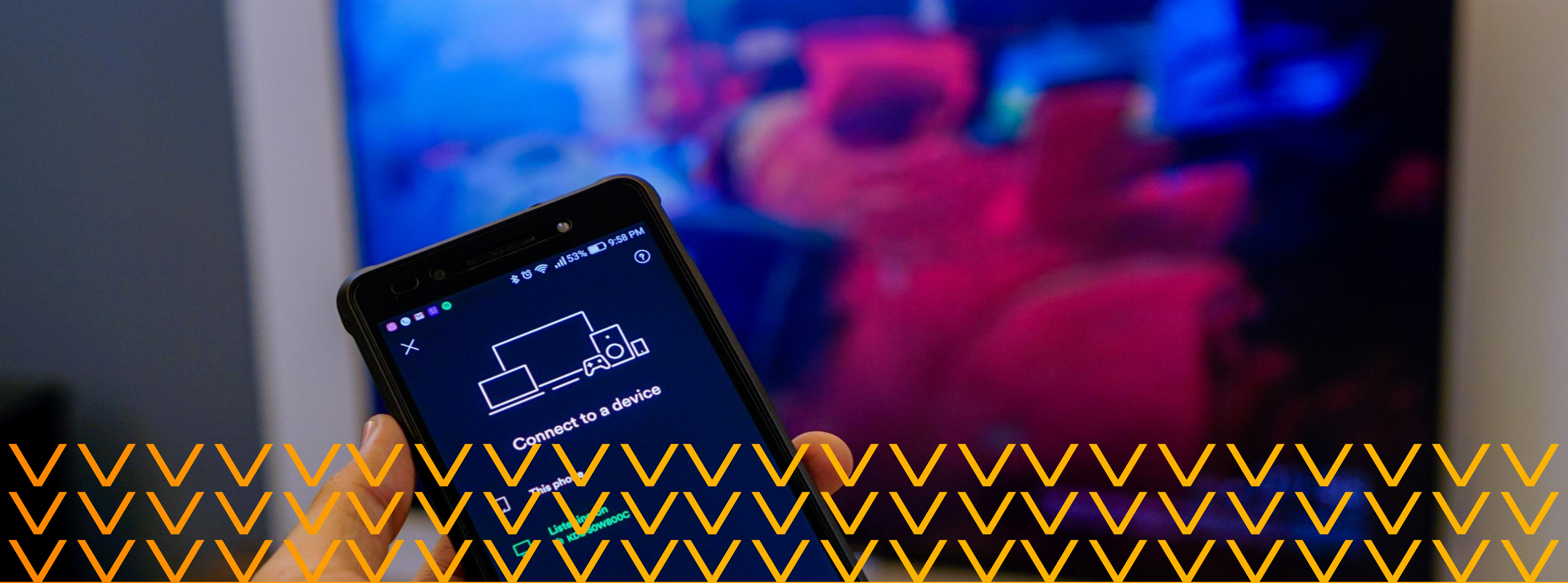
Association of AV Media

TV Report 2024

24

VIA TV Report 2024

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, 61.4% of all people declare to have a "smart TV" (source: CIM ES 2024).

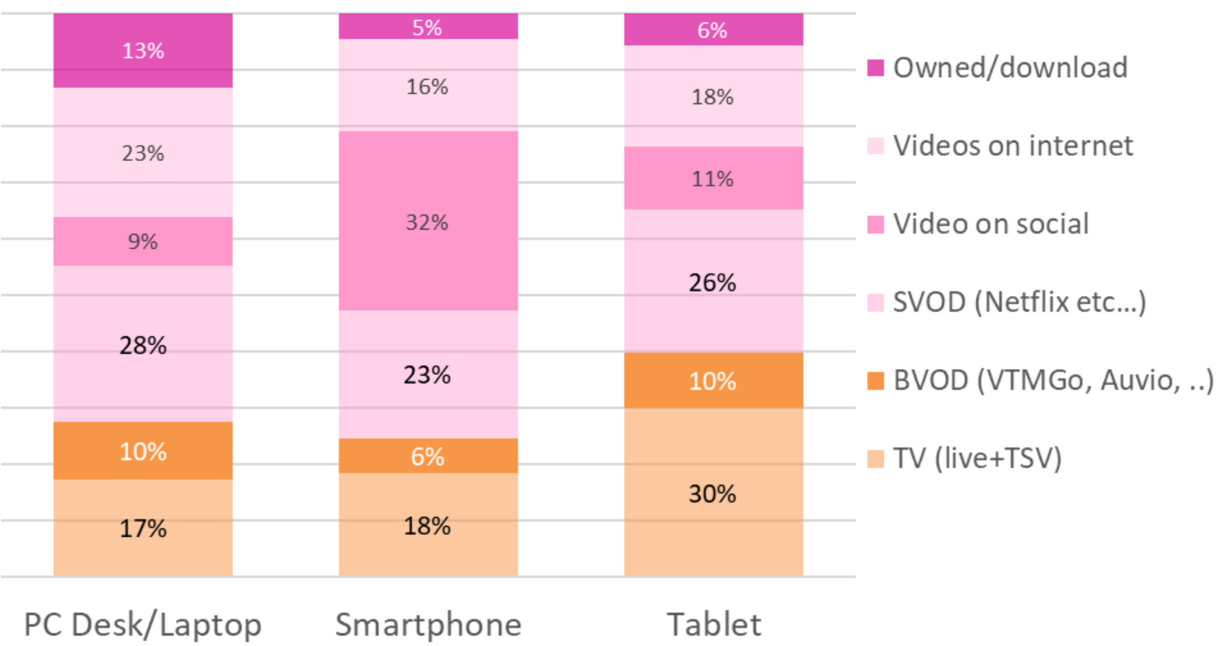
The broadcaster's activity on the TV-screen is defined in CIM as live viewing and time shifted viewing (TSV) up to 28 days after broadcast (up to 2023 the window to detect TSV was 7 days). CIM uses "finger-printing" to recognize content on the TV-screen – this means comparing viewed content by panelists with a library of channels to find the right channels (and content in the case of TSV).

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 it is very much on demand.
As this volume becomes important, CIM is rolling out in 2025 the implementation of a "routermeter" in the audimeter households to identify the streams. Based on the url's the volume of the different platforms can be defined – but not the specific content.

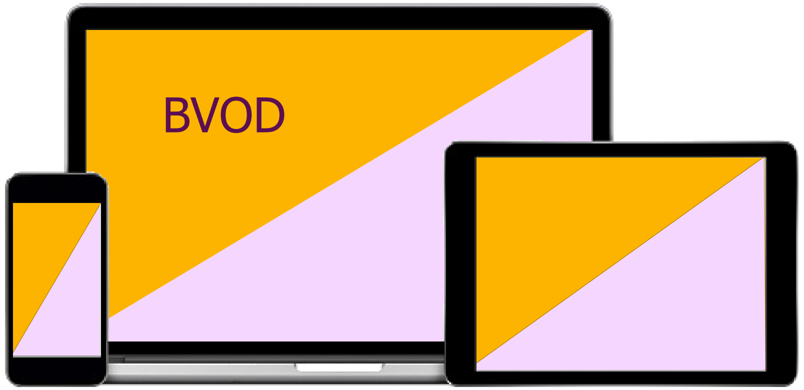
WHAT IS TV ?

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

Video content consumption of 18-54 per device



Source : Video Observer 2024, 18-54y



The broadcasters have developed BVOD (Broadcaster Video On Demand) platforms to facilitate this viewing. These apps allow non-linear viewing of recent but also older content, allow binge watching and previews. VTMgo, GoPlay, VRTnu, Auvio and RTLplay are the core players.

This online BVOD content is measured within the CIM internet study.
Content that is aired on the TV Screen and that is recognized on other screens is brought together in OVC (online video content) and can be added to the TV-screen viewing in one reporting.

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.

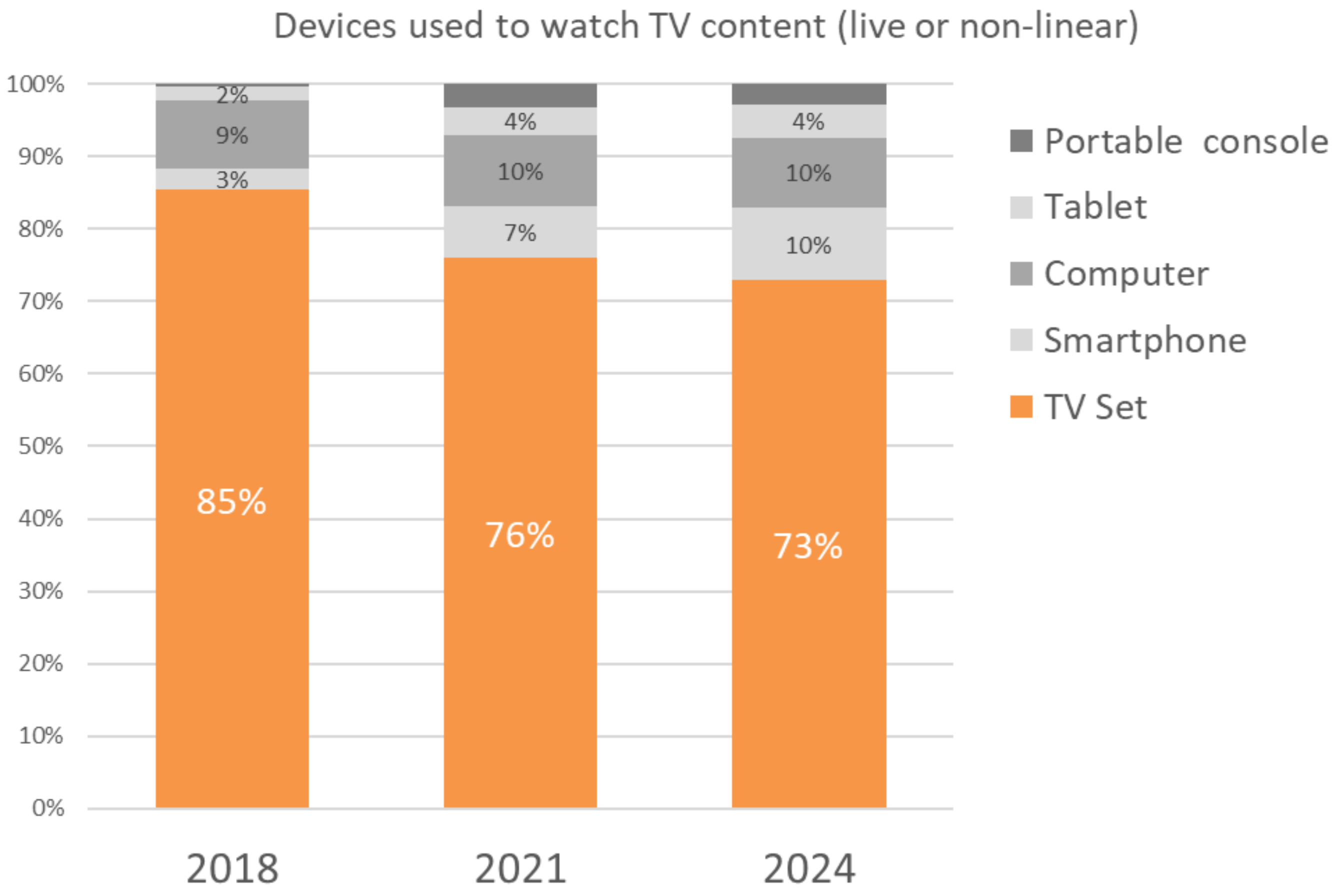
TV CONTENT REMAINS PRIMARILY ON THE BIG SCREEN

If we only look at TV content – the total of live, time shifted viewing and non-linear viewing though the apps (BVOD), the evolution over 7 years is clear.

The big screen remains the most important device. While the possibility to watch TV content on other screens has been facilitated people prefer to watch it at home, in the most comfortable way.

Over the 7 years, we see the rise of the smartphone – thanks to BVOD this personal device opens extra opportunities to watch Broadcaster content where/when one wants.

This situation comes with a downside. As most viewing on the big screen is through set-top boxes that do not allow personal targeting of ads, the TV set remains the device to reach the masses in an optimal environment.



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 4 full years behind us, and most of its impact has faded. As a reference for the long trend we have kept the pre-covid year 2019 in the table.
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.

The number of advertisers seems to erode a little, and that is also true for the number of advertised brands. Still, the trend of using more different commercials and billboards is validated.
The average spot length (of the regular spots excluding billboards) does not break through the 20” barrier and has risen again to 20.4”

In the North, 8 extra channels were added in 2023. This caused the rise of the number of aired spots, but the number per channel per day is down.
The same picture in the South: 4 extra channels boosted the number of aired spots but the number per channel per day dropped.
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) continues to decline in both regions. Live viewing – the driver of GRP’s - is going down and that has an effect. The consequence is a decline of the GRP per average spot. Still this level in the South is more than double of the North.

Number of :	2019	2020	2021	2022	2023	2024	*Index vs 2023*
Advertisers	1,178	1,036	1,120	1,170	1,144	1,108	*97*
Brands	2,035	1,570	1,685	1,756	1,651	1,614	*98*
Commercials	12,059	11,697	13,479	14,250	14,755	14,674	*99*
New Commercials	10,698	10,403	12,019	12,630	13,459	13,301	*99*
Commercials/Brand	5.9	7.5	8.0	8.1	8.9	9.1	*102*
Spotlenght (spots on	21.0''	21.6''	20.3''	20.1''	20.0''	20.4''	*102*

North (spots only)

	2019	2020	2021	2022	2023	2024	Index vs 2023
Number of channels	34	36	38	40	42	50	*119*
Spots	2,886,554	2,569,036	3,925,919	4,159,544	4,350,827	4,599,605	*106*
Spots/channel/day	233	195	283	285	284	251	*89*
GRP 18-54	883,195	819,584	889,084	831,048	730,971	687,145	*94*
GRP per spot	0.31	0.32	0.23	0.20	0.17	0.15	*89*

South (spots only)

	2019	2020	2021	2022	2023	2024	Index vs 2023
Number of channels	21	24	24	24	24	28	*117*
Spots	1,100,784	1,105,509	1,360,366	1,437,272	1,444,723	1,613,442	*112*
Spots/channel/day	144	126	155	164	165	157	*95*
GRP 18-54	755,747	690,606	778,461	696,183	623,354	593,013	*95*
GRP per spot	0.69	0.62	0.57	0.48	0.43	0.37	*85*

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

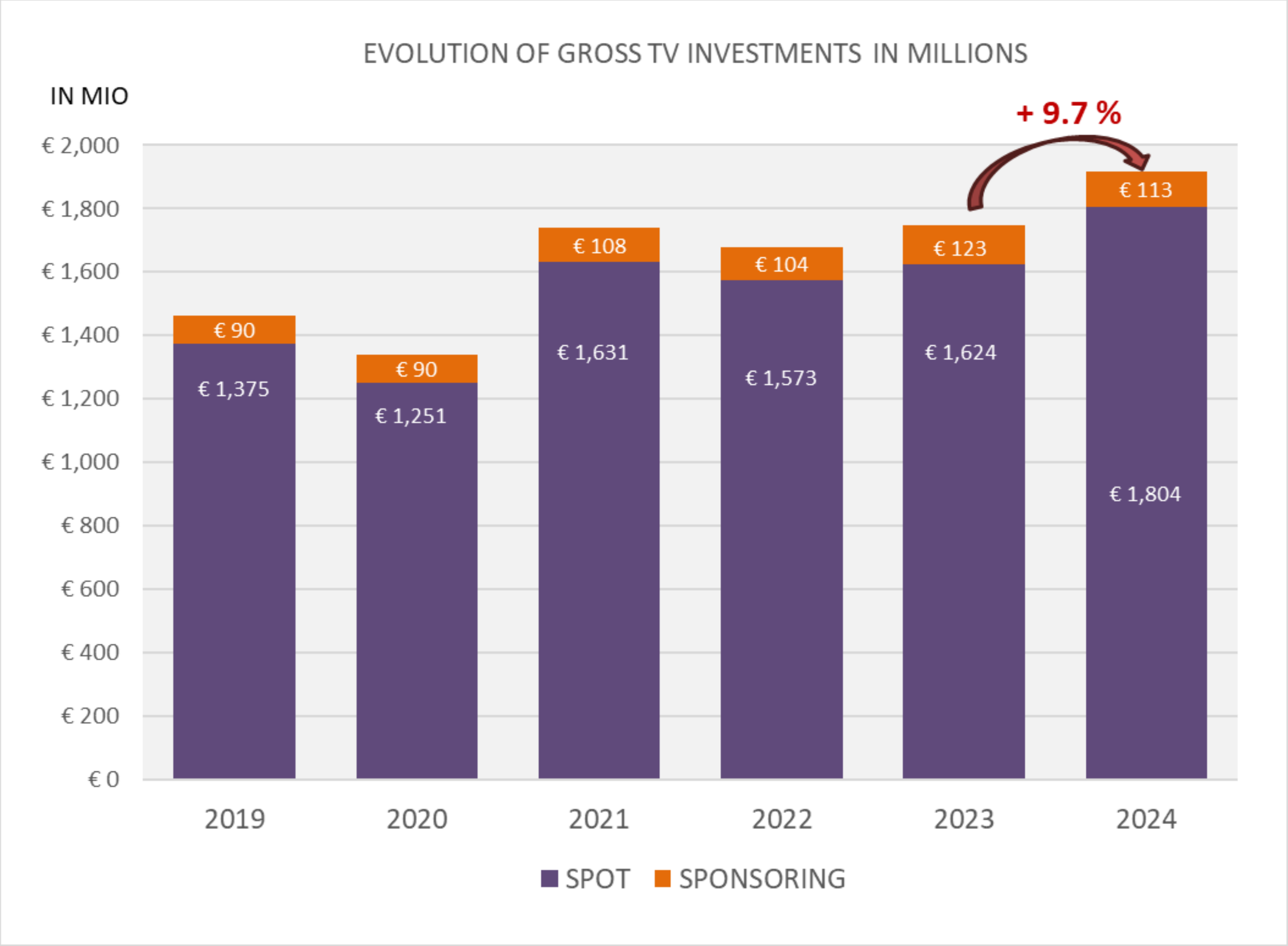
TV ADVERTISING. GROSS INVESTMENTS

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 2024 was an excellent year. While 2023 was a recovery year after the energy crisis and the inflation shock, the TV spend lifted from the start of the year and continued to do so up to Q3 included. In Q4, some of the extras got lost but the overall result is impressive : a rise with 9.7% to 1.916 Million. This is clearly above the recovery year 2021, but of course we need to take into account price-inflation over the years to have the real growth.

When looking at the type of investment, sponsoring did not grow further. It is an alternative way to avoid the cluttered spot environment.



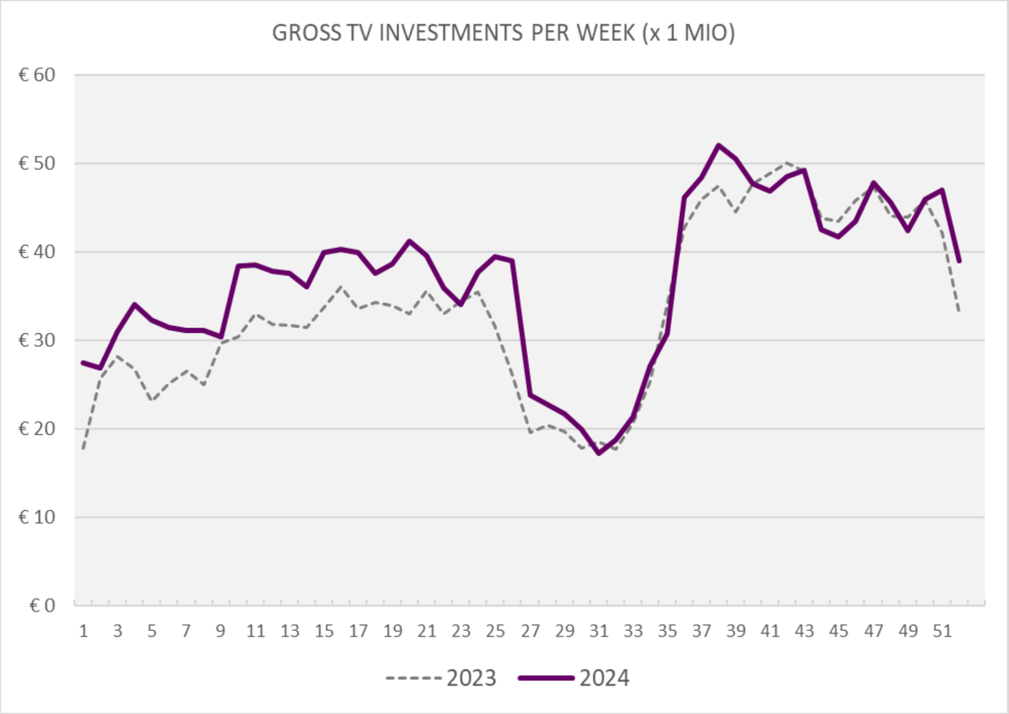
Source : MDB Nielsen. Excluded : (Associated) Manifestations/Shows, Fairs, Media/Publishers

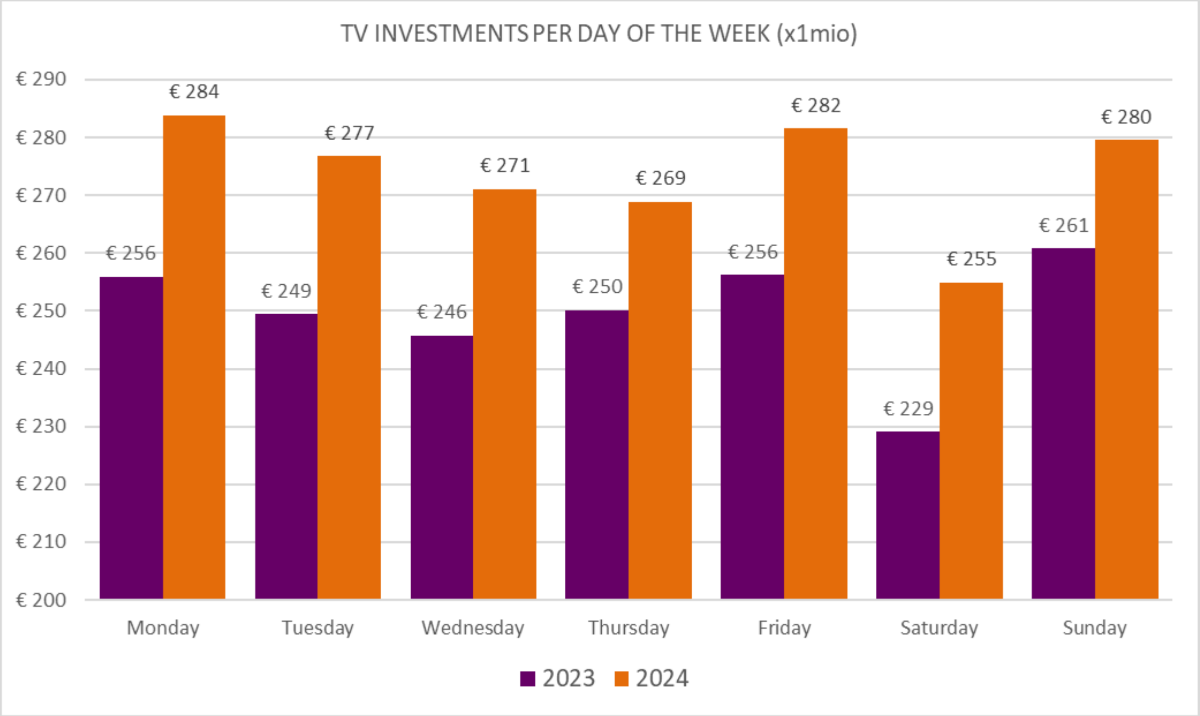
GROSS TV INVESTMENTS PER WEEK | PER DAY OF THE WEEK

In general, the investments per week follow the classic curve of seasonality of TV investments with a drop during summer and a heavy peak in the fall.
2024 was particular as the year started strong and remained strong until summer.
The start of autumn was exceptionally strong but around week 40 we see the turning point with lower investments versus 2023.
Finally the overall result was still very positive with 9.7% growth.

When looking at TV investments by day of the week the importance of specific days remained intact.
During the week, only Thursday grew less than the other days.
Also Sunday witnessed lower growth but this is probably due to the excellent performance in 2023.

Friday is 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

The Distribution sector took the lead from Food in 2024, with an impressive growth of 20% after a stabilization of 3 years.

The biggest grower is the Cleaning sector that went up with +44%. This sector nearly doubled since pre-covid.
Health&wellbeing are in a continuous rise with +23% in 2024. Also the Pets sector is a steady grower, with again +29%.

A few sectors remain rather stable when looking at the longer term, including the pre-covid year 2019. This is the case for the Food, Beauty and hygiene, Culture & sports, and to some extend the Car sector.

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

As overall the investments have grown we see few sectors that are lagging behind. The Energy sector had a slow year, and the Clothing sector seems to be in a continuous decline.

Economical group (in mio)	2019	2020	2021	2022	2023	2024	*index vs 2023*
DISTRIBUTION	€ 186	€ 196	€ 306	€ 297	€ 305	€ 368	*120*
FOOD	€ 322	€ 272	€ 379	€ 325	€ 339	€ 336	*99*
BEAUTY - HYGIENE	€ 196	€ 158	€ 197	€ 175	€ 187	€ 196	*105*
CULTURE, TOERISM, SPORT	€ 184	€ 160	€ 172	€ 191	€ 189	€ 190	*100*
HEALTH - WELLBEING	€ 102	€ 104	€ 118	€ 138	€ 137	€ 168	*123*
CLEANING PRODUCTS	€ 88	€ 99	€ 110	€ 81	€ 105	€ 151	*144*
TRANSPORT	€ 126	€ 80	€ 107	€ 123	€ 131	€ 146	*111*
HOME IMPROVEMENT	€ 62	€ 76	€ 114	€ 103	€ 97	€ 112	*115*
SERVICES	€ 88	€ 92	€ 115	€ 118	€ 110	€ 109	*99*
TELECOM	€ 77	€ 75	€ 82	€ 85	€ 100	€ 102	*101*
PETS	€ 4	€ 3	€ 8	€ 9	€ 13	€ 16	*129*
ENERGY - FUEL	€ 19	€ 17	€ 20	€ 17	€ 19	€ 14	*75*
CLOTHES - ACCESSOIRES	€ 9	€ 8	€ 10	€ 14	€ 13	€ 8	*67*
OTHER		€ 0	€ 1	€ 0	€ 1	€ 0	*77*
TOTAL	**1464**	**1340**	**1739**	**1676**	**1747**	**1917**	**110**

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

GROSS TV INVESTMENTS – ADVERTISERS TOP 25

The top 25 advertisers represent 42% of all TV investments. This is up from 37% last year. The overall market growth was clearly boosted by these top 25 spenders as they were responsible of a staggering 85% of the extra millions in the market in 2024.

What immediately catches the eye is the enormous growth of P&G. With an extra 52 million they alone are responsible of 31% of the total TV market rise.

In the Top 10 ranking Henkel is the biggest climber, from 9 to 3 followed by AS Watson (AS Adventure) from 10 to 5. Colruyt and Delhaize are new in favor of Coca-Cola Services and Orange who both plunged to the bottom of the list.

In the distribution category, Lidl is a newcomer in the list and we notice that all companies in this sector show double digit growth.

The car industry did well last year with another increase for D'Ieteren (+22%) and Renault (+23%).

At the bottom of the list, we see Vinted and Pepsico back after a few slow years.

Overall, 18 of the 25 brands show a doubledigit growth.

	Advertiser (in mio)	2021	2022	2023	2024	*index vs 2023*
1	PROCTER & GAMBLE BENELUX	€ 140.0	€ 107.1	€ 137.1	€ 189.5	*138*
2	UNILEVER BELGIUM	€ 51.8	€ 30.9	€ 40.5	€ 53.9	*133*
3	HENKEL BELGIUM	€ 17.3	€ 22.7	€ 23.7	€ 48.7	*206*
4	FERRERO	€ 34.6	€ 35.4	€ 41.2	€ 41.0	*100*
5	AS WATSON	€ 20.8	€ 18.6	€ 23.2	€ 36.5	*157*
6	D'IETEREN AUTO	€ 22.3	€ 26.2	€ 29.1	€ 35.5	*122*
7	PROXIMUS	€ 17.3	€ 22.3	€ 27.7	€ 29.1	*105*
8	RECKITT&BENCKISER HOME CARE	€ 30.5	€ 28.0	€ 26.7	€ 28.6	*107*
9	COLRUYT	€ 21.5	€ 19.3	€ 19.1	€ 25.2	*132*
10	DELHAIZE	€ 18.3	€ 19.3	€ 20.5	€ 23.7	*116*
11	RECKITT&BENCKISER HEALTHCARE	€ 16.0	€ 19.3	€ 17.7	€ 22.9	*129*
12	EMMA MATRATZEN	€ 9.6	€ 10.6	€ 21.6	€ 22.4	*103*
13	HELLOFRESH	€ 20.3	€ 16.3	€ 17.5	€ 20.6	*118*
14	CONTINENTAL FOODS	€ 16.6	€ 17.1	€ 22.3	€ 20.4	*91*
15	LIDL & CO	€ 8.3	€ 8.6	€ 12.7	€ 19.9	*157*
16	RENAULT BELGIQUE LUXEMBOURG	€ 12.8	€ 14.6	€ 15.8	€ 19.5	*123*
17	MONDELEZ INTERNATIONAL	€ 14.0	€ 14.8	€ 16.3	€ 19.0	*117*
18	BOL.COM	€ 15.9	€ 17.4	€ 17.1	€ 19.0	*111*
19	COOLBLUE	€ 22.9	€ 18.5	€ 14.5	€ 19.0	*130*
20	TELENET OPERATIES	€ 15.1	€ 16.2	€ 14.6	€ 18.8	*129*
21	VINTED	€ 23.6	€ 9.5	€ 12.5	€ 17.6	*141*
22	ORANGE	€ 15.5	€ 15.5	€ 25.9	€ 17.1	*66*
23	COCA-COLA SERVICES	€ 52.0	€ 38.2	€ 32.5	€ 16.7	*51*
24	PEPSICO BELUX	€ 19.3	€ 11.2	€ 9.3	€ 16.6	*178*
25	MCDONALD'S BELGIUM	€ 8.5	€ 12.1	€ 13.6	€ 16.4	*120*
	TOTAL	**€ 645**	**€ 570**	**€ 653**	**€ 797**	**115**

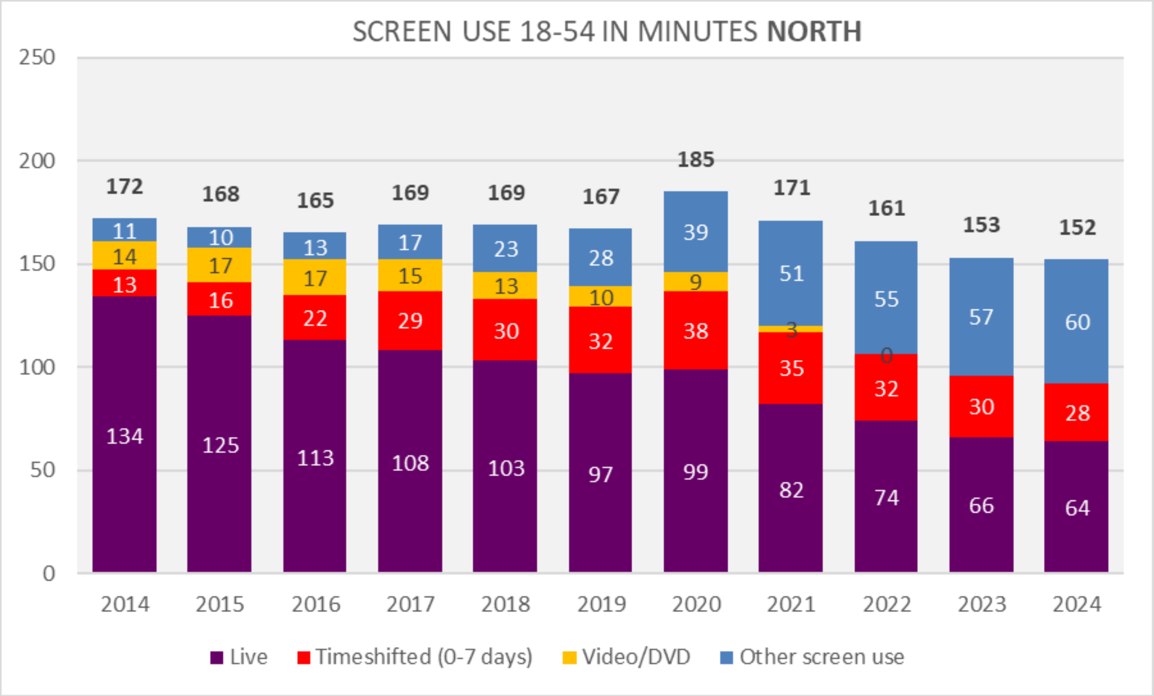
Source : Nielsen MDB - Excluded : (Associated) Manifestations/Shows, Fairs, Media/Publishers

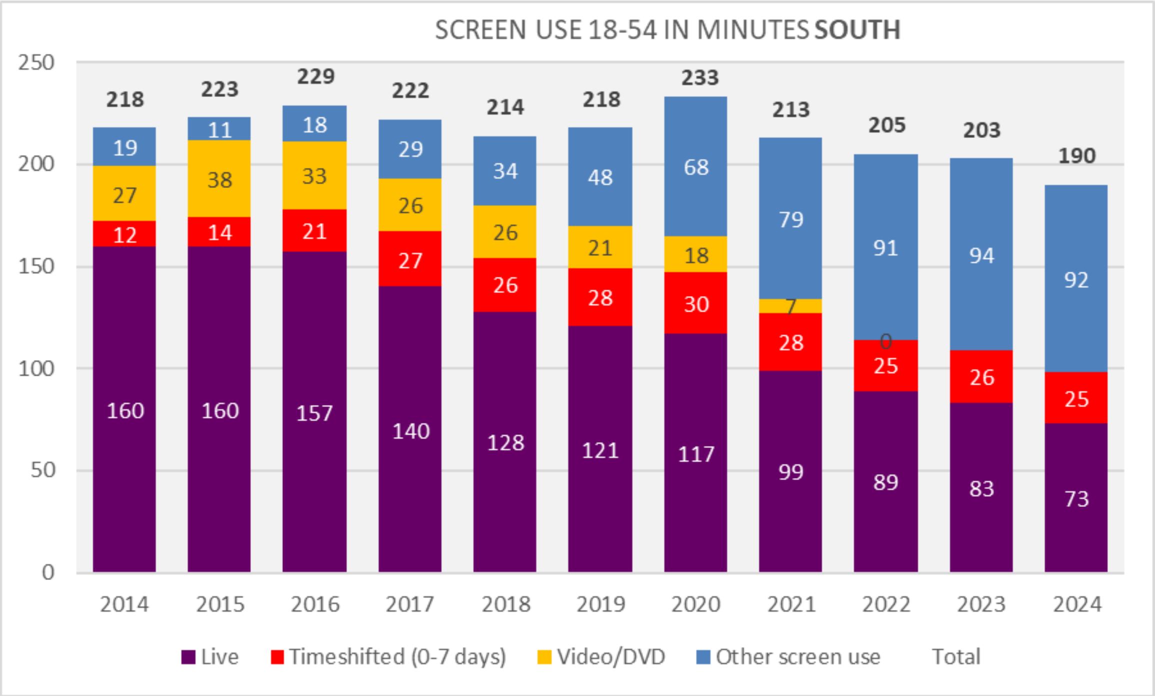
3. WATCHING ON THE TV SCREEN

▶ TV-SCREEN TOTAL CONSUMPION ON TARGET 18-54 YEARS

Total time watching the TV screen has continued to drop since covid but seems to stabilize. In the North, people spend about 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 hardware like 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 60’ last year and in the South from 86’ in 2021 to 92’ in 2024.

It is the consumption of TV-channels – especially live viewing - that continues to drop or that shifts towards other screens.
Time shifted viewing (0-7 days) continues to decline since covid – and the difference between North and South has become a little 3’.
When comparing broadcaster content versus Other screen use, the broadcasters still account for 61% of all viewing on the first screen in the North, and 52% in the South (where the actual minutes are still higher versus the North).



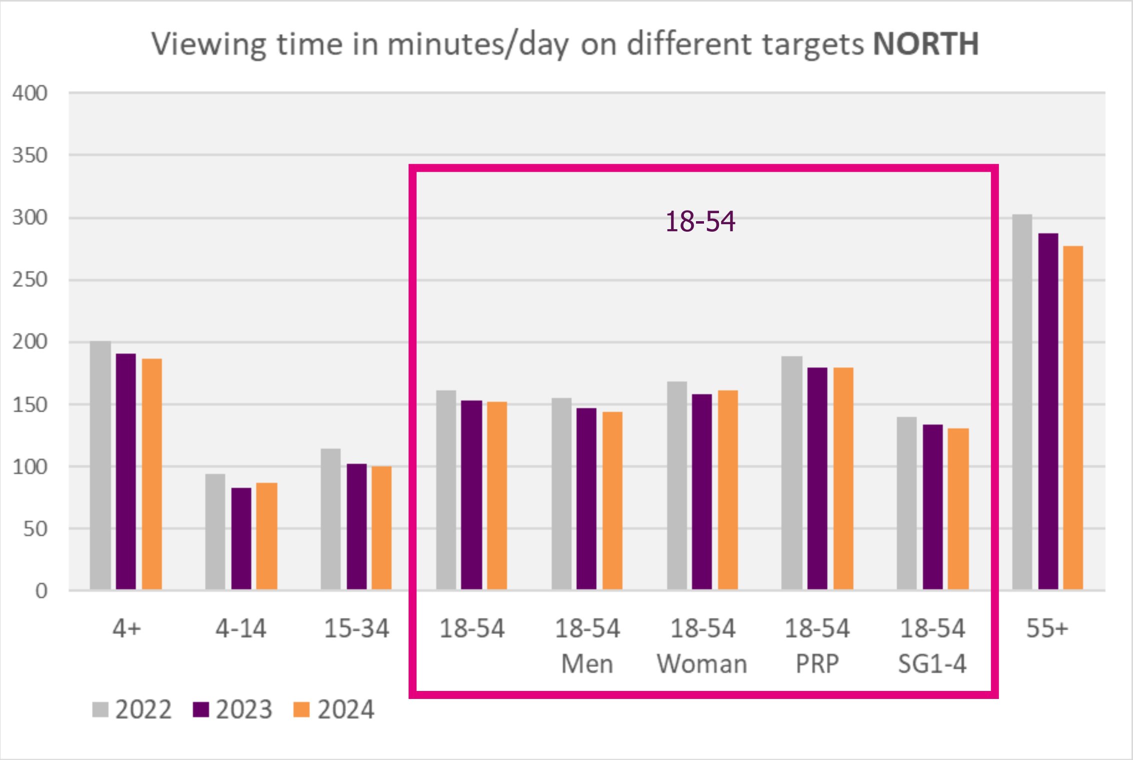


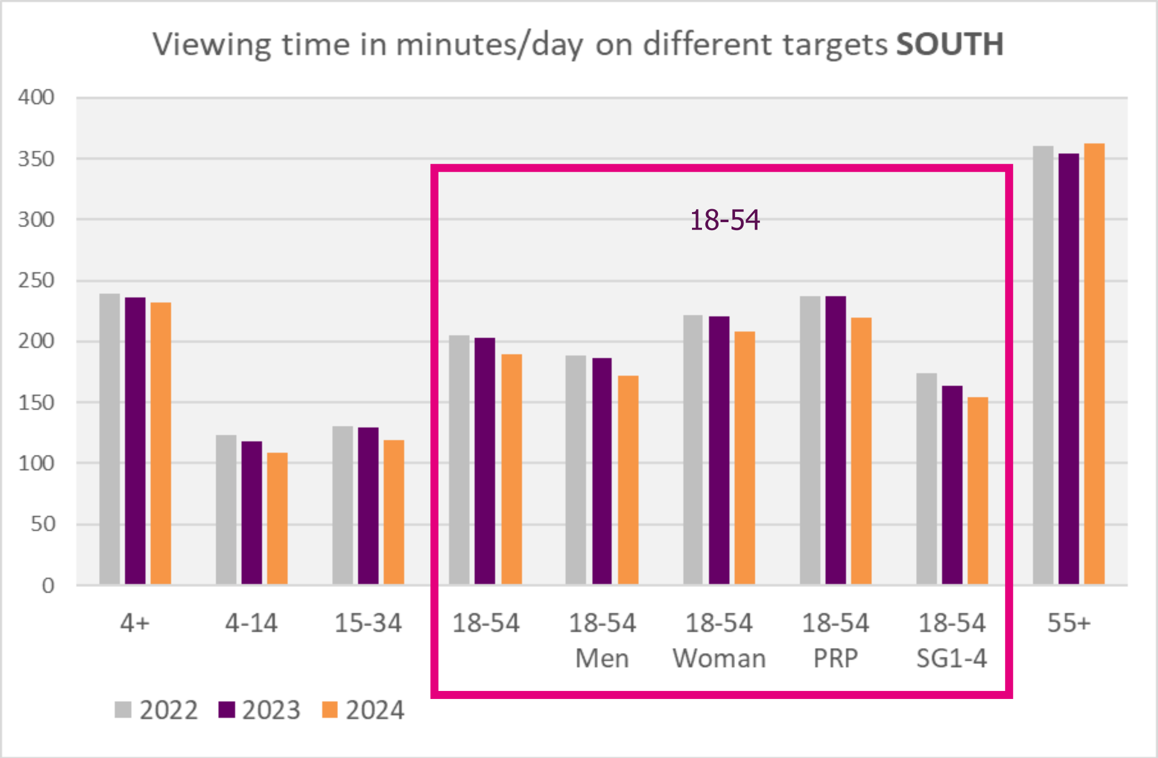
Source : CIM TV, All 18-54, Live+7, Total screen use,

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 2023.
Some exceptions : more limited decline with children – and in North Men and the higher social groups 1-4 seem to be more resistent.

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.



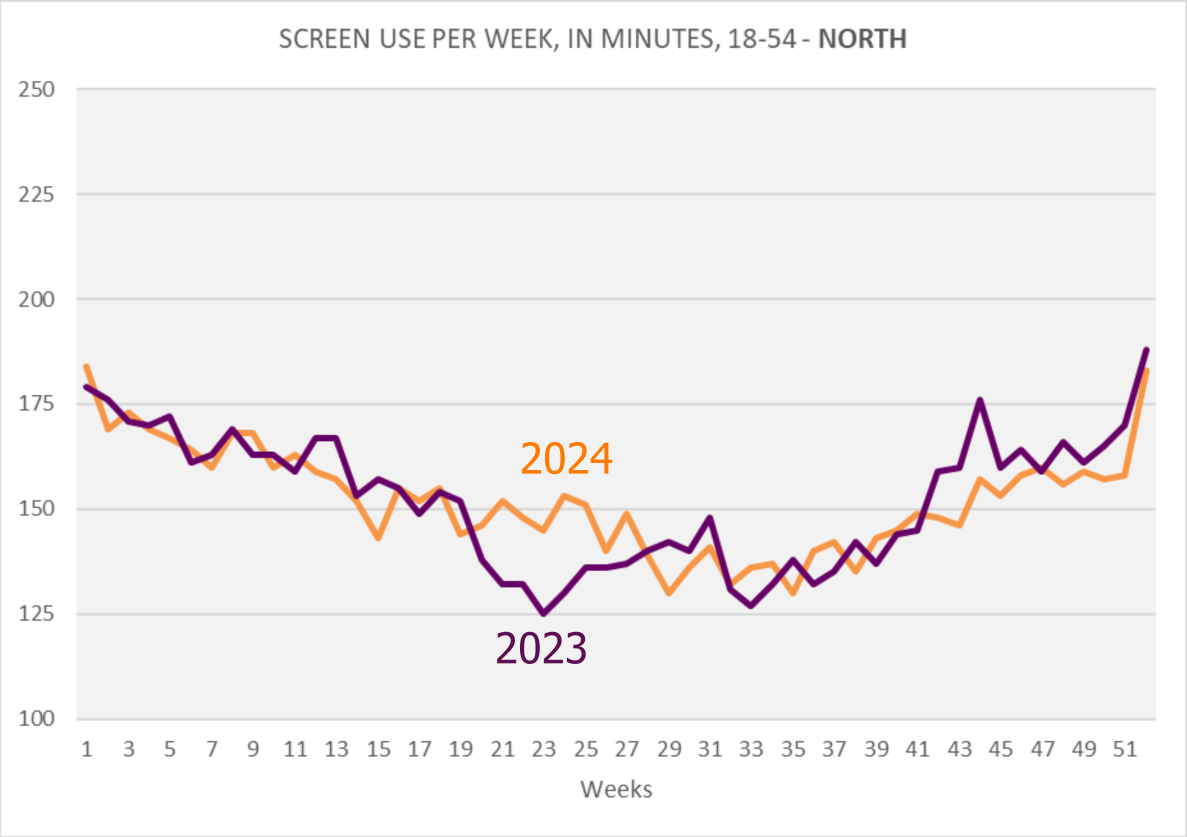


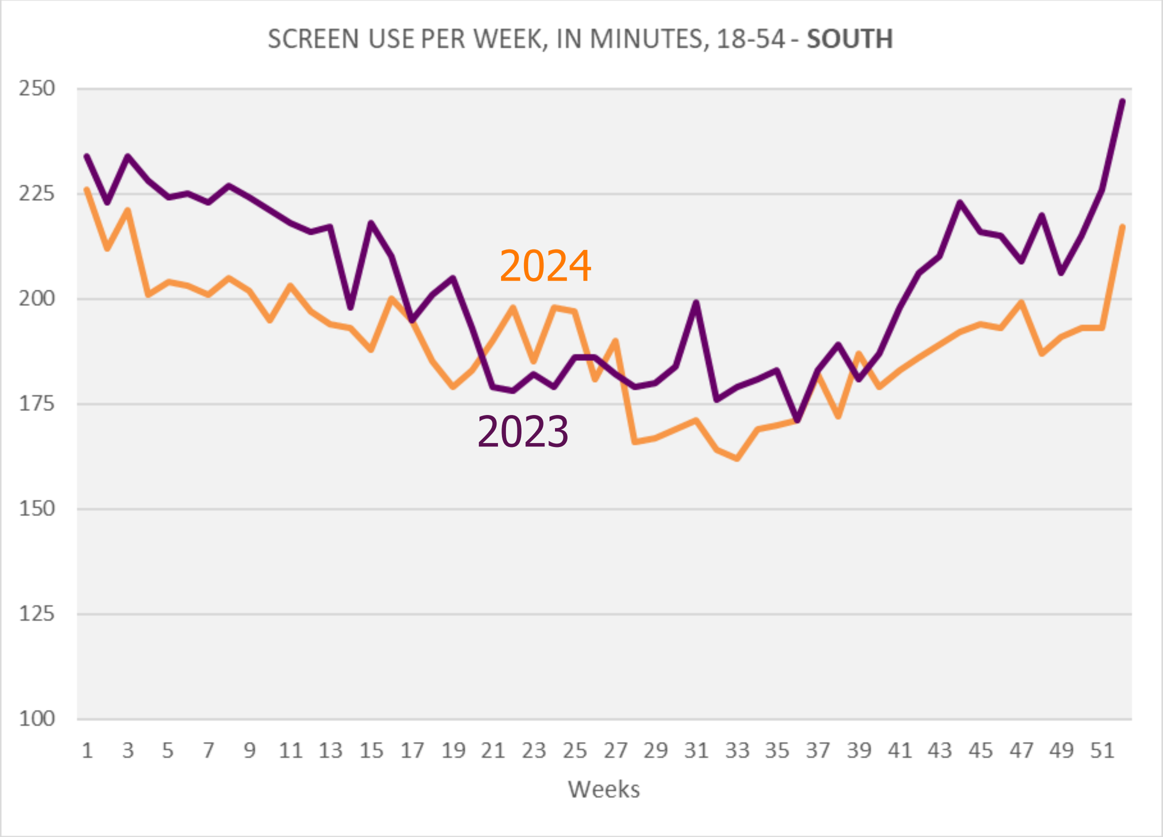
Source : CIM TV, All 18-54, Live+7, ATV

EVOLUTION OF TV SCREEN USE PER WEEK

Looking at tv consumption on a weekly basis, the typical seasonality of TV viewing shows.
2024 had a sports-summer, with the Euro football championship in June and the Olympics in Paris starting end of July. The average temperature was best in August, which might explain lower ratings.

In the South the overall decline was present all over the year, with the exception of the June football period. This is reflected in the ranking of best viewed programs (further in this report).



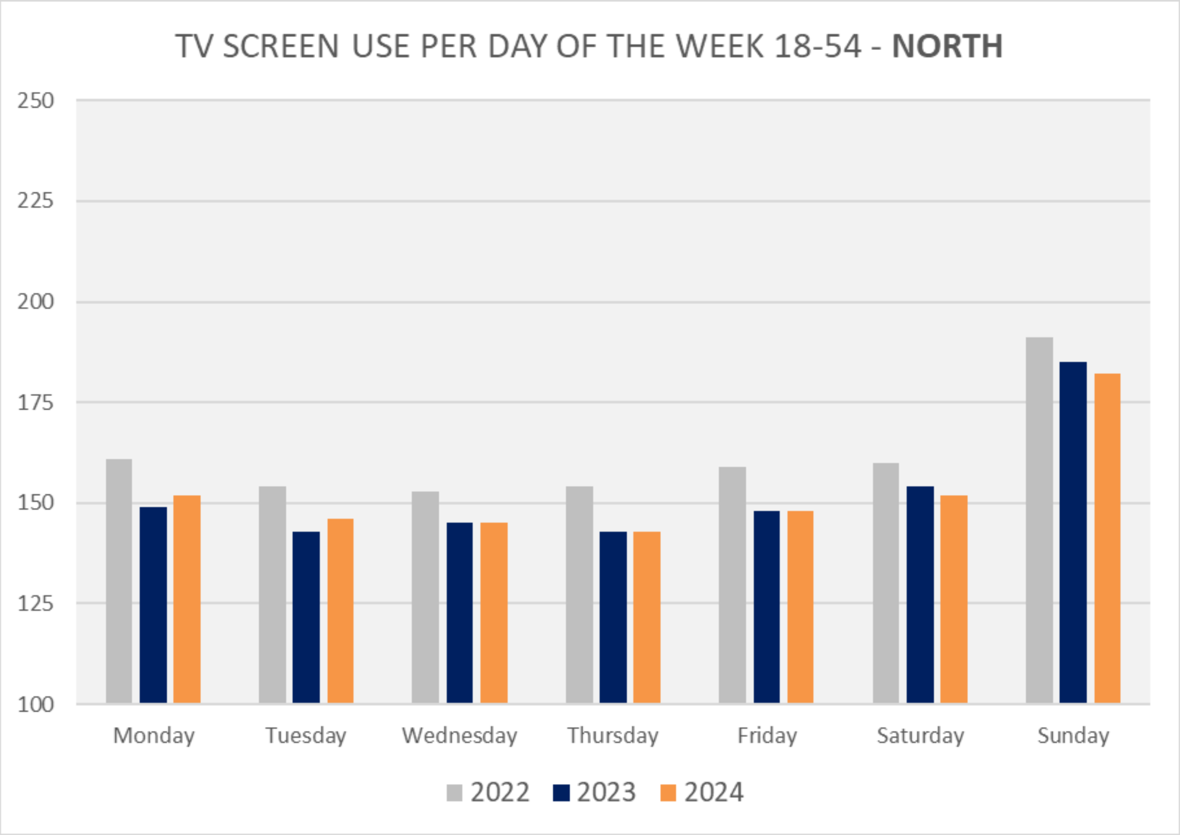


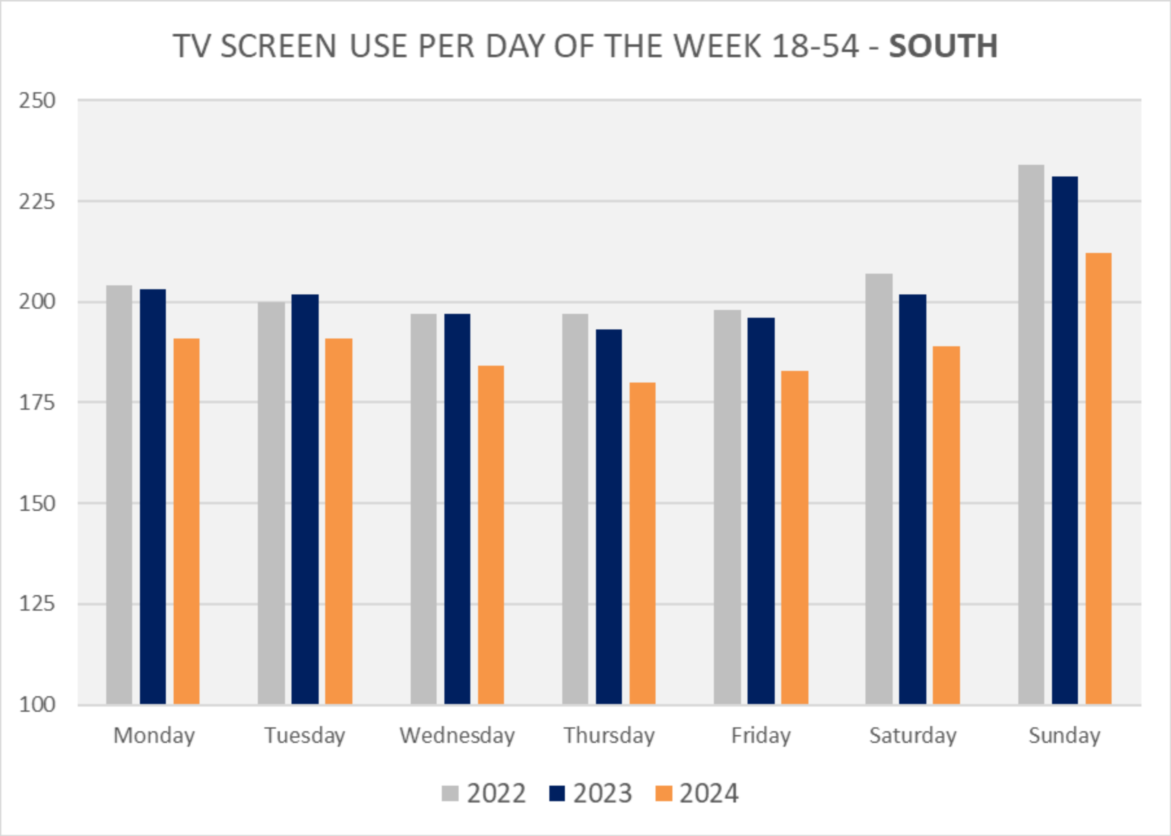
Source : CIM TV, All 18-54, Live+7, ATV

EVOLUTION OF TV-SCREEN USE PER DAY 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. As shown before, this does not reflect the spendings, that tend to be higher at the start of the week and on Friday, while Saturday is the least used day.

In the North, the week ratings are steady. The small decline was produced during the weekend.
In the South the decline was present overall, with a peak on Sunday and midweek.



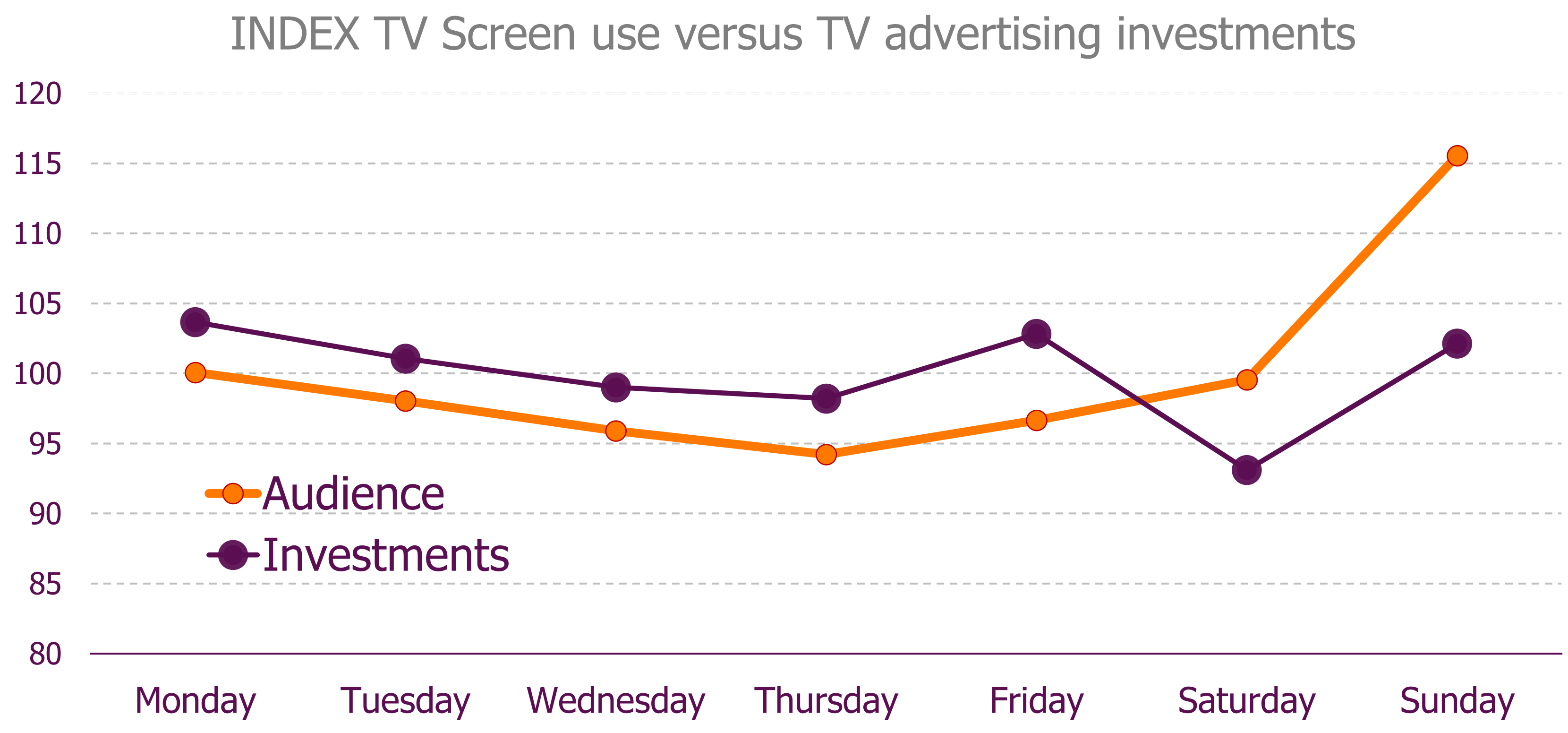


Source : CIM TV, All 18-54, Live+7, ATV

DAY OF THE WEEK : AUDIENCES VERSUS INVESTMENTS 2024

On order to compare audiences with investments we have calculated the indexes up or down for both parameters versus their weekly average.
The audiences are weighted over North and South on population 18-54.

At the start of the week both indexes are aligned. On Friday, the boost of investment is linked to the weekend and retail activities. In the weekend, the audience surplus is undervalued, especially on Saturday.



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

SALES HOUSE SHARES ON TARGET 18-54 IN THE NORTH

DPG Media and Ads&Data commercialize the channels of their shareholders but are also the sales house of external channels. Transfer Media is independent and has only external (smaller) channels in portfolio. All 3 combined represent the “open” market, good for 63.6% of the audience on 18-54.
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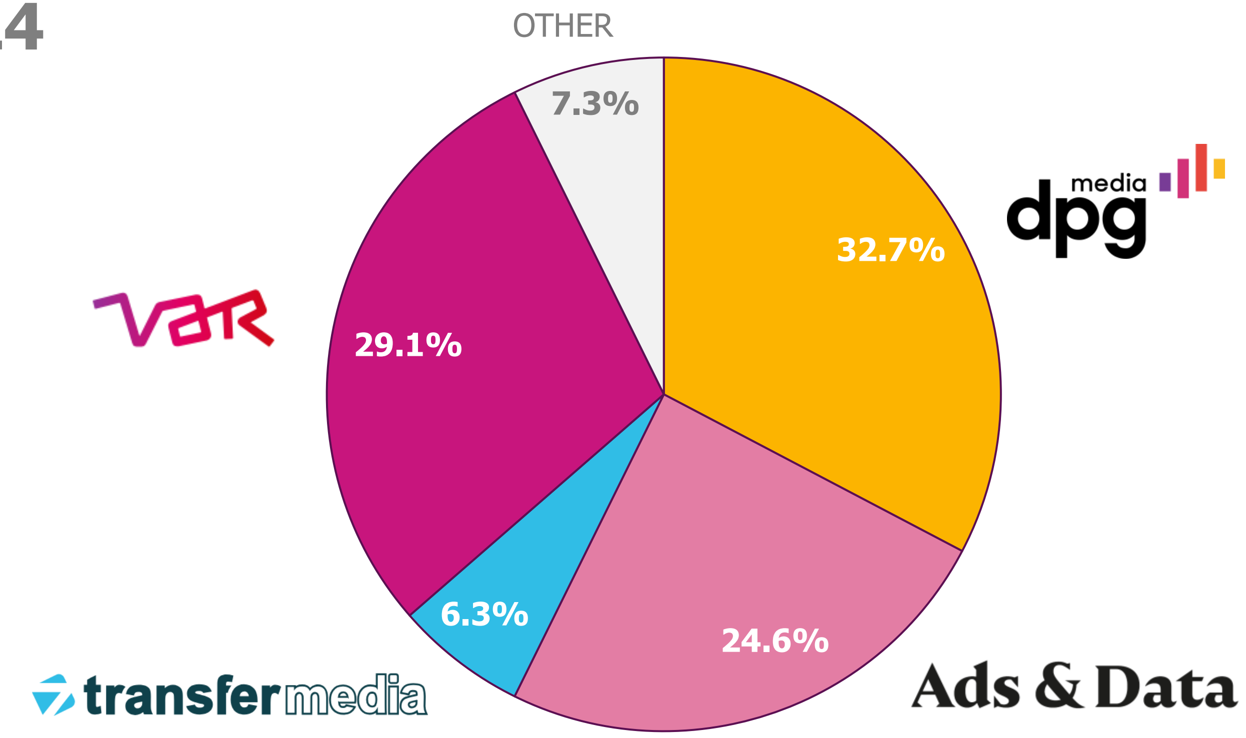
VAR sticks to the “own” VRT channels where the possibilities are limited to sponsoring. In total close to 93% of the audience is available for (some sort of) advertising.

2024



Channel	2024 versus 2023
VRT1	+ 2.0%
VTM	- 1.2%
PLAY 4	+ 0.5%
VTM2	- 0.7%
VRT CANVAS	+ 0.2%
PLAY 5	- 0.3%
VTM3	- 0.5%
PLAY 6	- 0.5%
Discovery	- 0.2%
PLAY Crime	(new)
VTM4	- 0.2%
VTM Gold	+ 0.2%
Regional Channels	+ 0.2%
Kids Channels	+ 0.8%
Other NL	- 3.0%
Radio Channel	+ 0.5%
Other languages	+ 0.7%

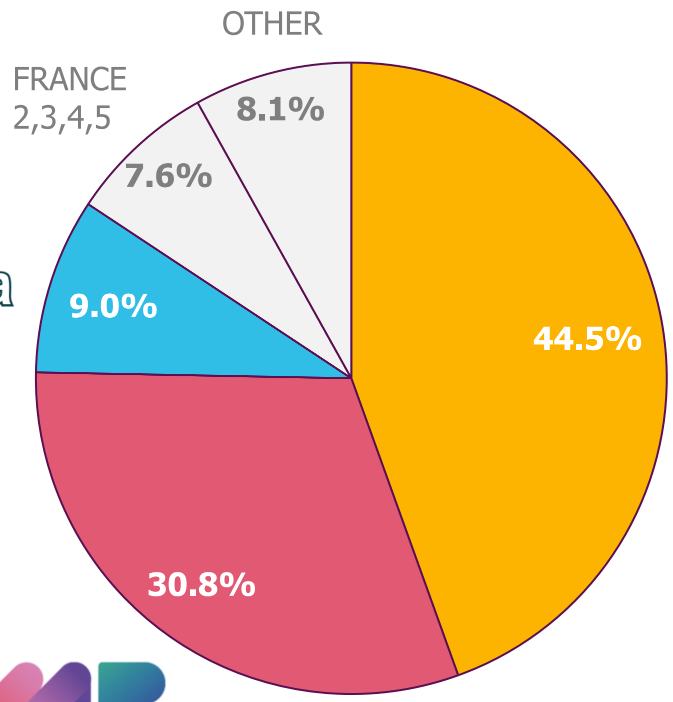
Source : CIM TV – 18-54 – Live+7

SALES HOUSE SHARES ON TARGET 18-54 IN THE SOUTH

In the South only 3 saleshouses are active, and they all offer "full" commercial possibilities. But as the France Tv channels take some audience, the total available commercial share in the South is limited to 84%.

DPG Media (RTL channels) and RMB (RTBF Channels) have also outside channels in portfolio. Transfer Media is more important in the South (versus its share in the North).

2024



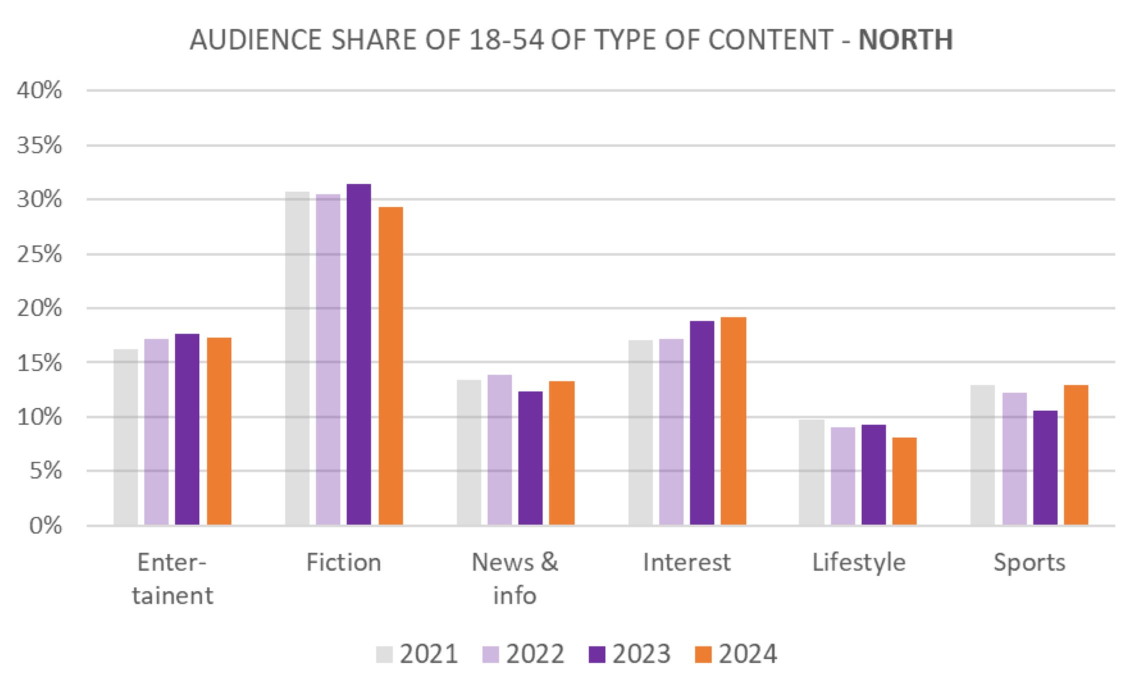
Channel	2024 versus 2023
RTL-TVI	-0.2%
TF1	1.1%
LA UNE	-0.9%
TIPIK	0.9%
AB3	-1.1%
CLUB RTL	0.4%
TMC	0.3%
PLUG RTL	0.2%
C8	0.2%
TV BREIZH	0.2%
ABXPLORE	-0.7%
13IEME RUE FR	0.3%
LA TROIS	0.0%
LES NEWS 24	0.1%
FRANCE 2+3+4+5	-0.5%
Kids channels	-0.1%
Other FR	-9.4%
Radio channels	-0.9%
Other languages	1.3%

Source : CIM TV – 18-54 – Live+7

4. BROADCASTERS CONTENT (on the TV screen)

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 are News, special Interest and certainly Sports that benefit of more viewing (or have a bigger offer). All 3 of them are on the rise in 2024.
Entertainment, fiction and lifestyle go down compared to 2023.
In sports we see a clear interest in cycling compared to the South.

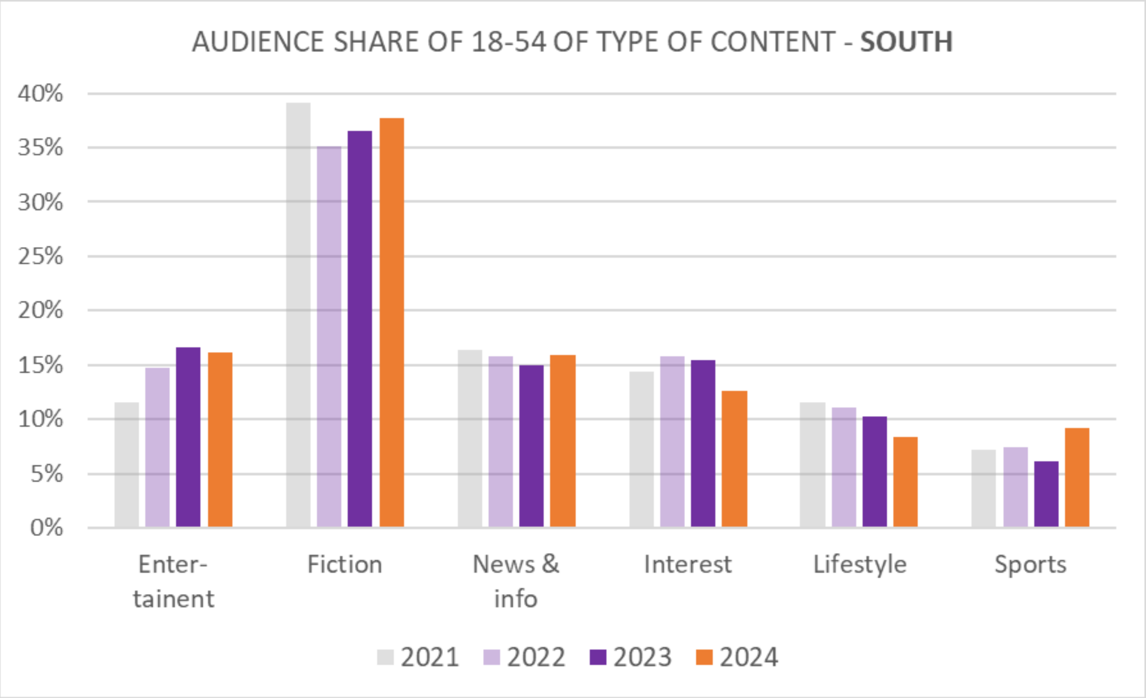


NORTH	2021	2022	2023	2024	index vs 2023
Entertainment Game shows	6%	6%	7%	5%	82
Entertainment Humour	1%	1%	2%	2%	107
Entertainment Music	4%	5%	5%	5%	97
Entertainment other	2%	2%	1%	2%	142
Entertainment love dating	2%	2%	2%	2%	104
Entertainment Talk	1%	1%	1%	2%	118
Fiction action/adventure	6%	6%	5%	5%	93
Fiction Comedy	6%	6%	6%	6%	100
Fiction Drama	7%	6%	5%	5%	93
Fiction other	2%	2%	3%	3%	101
Fiction Police/Detective	5%	6%	7%	6%	89
Fiction Soap	4%	5%	5%	4%	90
General news+specials	10%	11%	10%	10%	93
Information	3%	3%	2%	4%	188
Interest Human/Society	12%	13%	15%	15%	101
Interest Nature environment	1%	2%	1%	1%	69
Interest other	4%	3%	3%	3%	124
Lifestyle Cooking	3%	3%	3%	3%	111
Lifestyle Decoration	2%	2%	2%	1%	62
Lifestyle other	3%	4%	3%	3%	84
Lifestyle Travel/tourism	2%	1%	2%	1%	82
Sports cycling	3%	3%	4%	3%	79
Sports Football	6%	5%	3%	5%	152
Sports other	4%	3%	3%	4%	141

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

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 the largest category – and comedy the most important sub section- and continuous to rise while entertainment is in decline.
Lifestyle programs are declining since 2021 while interest programs notices a steep decline.
As for sports: football was the winner in 2024, certainly with the help of the Euro 2024 competition.



SOUTH	2021	2022	2023	2024	index vs 2023
Entertainment Game shows	5%	6%	7%	6%	80
Entertainment Humour	2%	2%	2%	2%	92
Entertainment Music	2%	2%	3%	4%	159
Entertainment other	3%	4%	5%	4%	91
Fiction action/adventure	7%	6%	6%	7%	117
Fiction Comedy	11%	10%	11%	11%	106
Fiction Drama	8%	7%	7%	7%	101
Fiction Police/Detective	8%	8%	9%	8%	95
Fiction Soap	2%	1%	2%	2%	103
Fiction other	3%	3%	2%	2%	92
General news+specials	13%	13%	12%	12%	101
Information	3%	3%	3%	3%	131
Interest Human/Society	10%	10%	11%	9%	82
Interest Nature environment	1%	1%	1%	1%	104
Interest other	4%	5%	3%	3%	77
Lifestyle Cooking	3%	3%	2%	2%	99
Lifestyle Decoration	2%	2%	2%	1%	74
Lifestyle Travel/tourism	1%	1%	1%	1%	81
Lifestyle Consumer advice	1%	1%	1%	1%	98
Lifestyle other	4%	5%	4%	3%	68
Sports cycling	1%	1%	1%	1%	83
Sports Football	5%	4%	3%	5%	190
Sports other	2%	2%	2%	3%	138

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

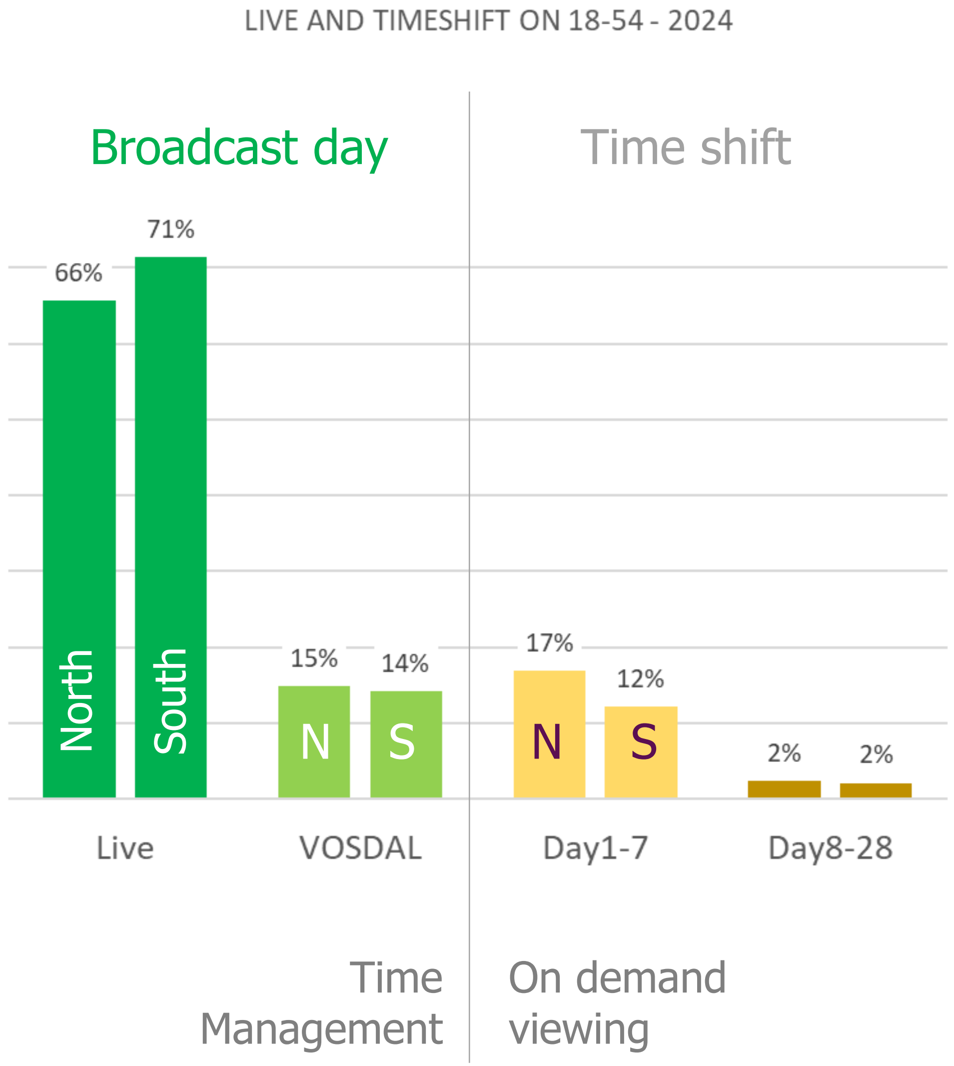
TIME SHIFTED VIEWING

Due to the sound matching technique, it is possible to find a specific video sequence back in time.

An important part of this delayed viewing is on the same day as live (VOSDAL). This can be by pausing the viewing for a period, by recording it or by replaying it using the services that most providers offer.
Thanks to the limited effort it has become part of the viewing experience to manage the time of viewing. And it came with a bonus as advertising could be skipped.
As this undermined the business model of most broadcasters, efforts have been made to “win back” this audience by limiting the zipp functions or by introducing non-skippability.

As of the next day, a more “on demand viewing” starts.
Some people were not able to watch the previous day.
Others watch a lot and need extra time to catchup.
As time goes by, the viewing become truelly on demand in function of interest – with a small peak after one week for those who have missed the previous episode of a series.

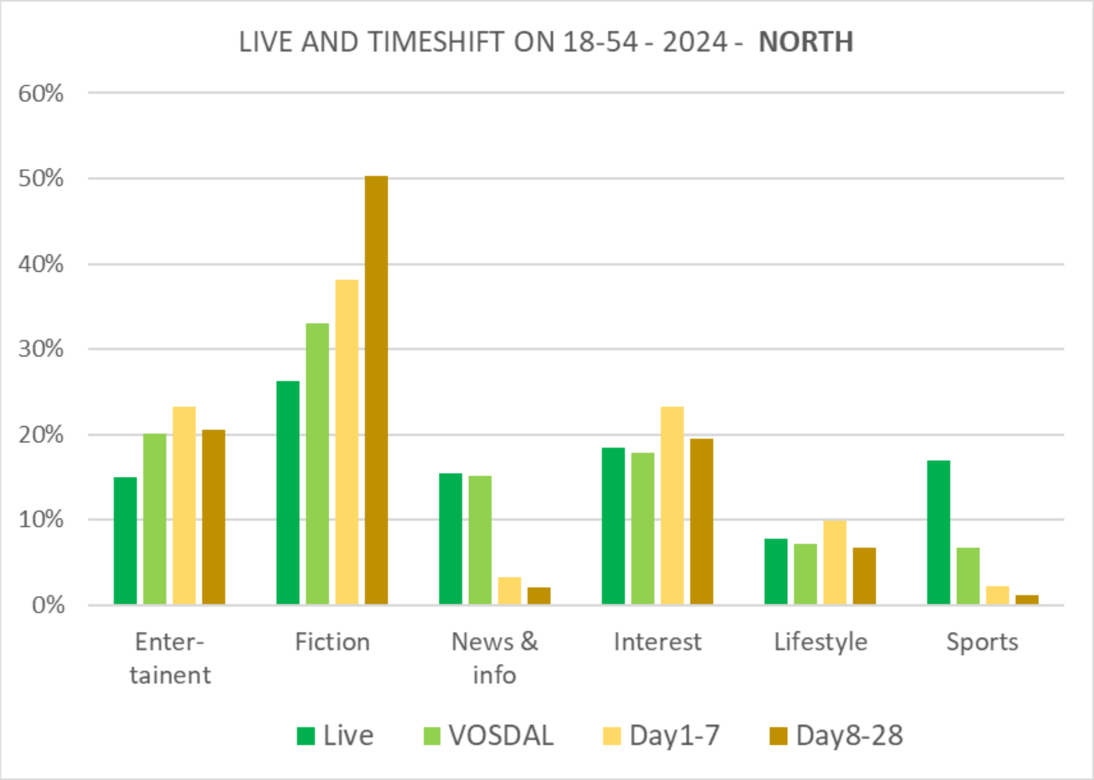
Time shifted viewing is clearly more important in the North.

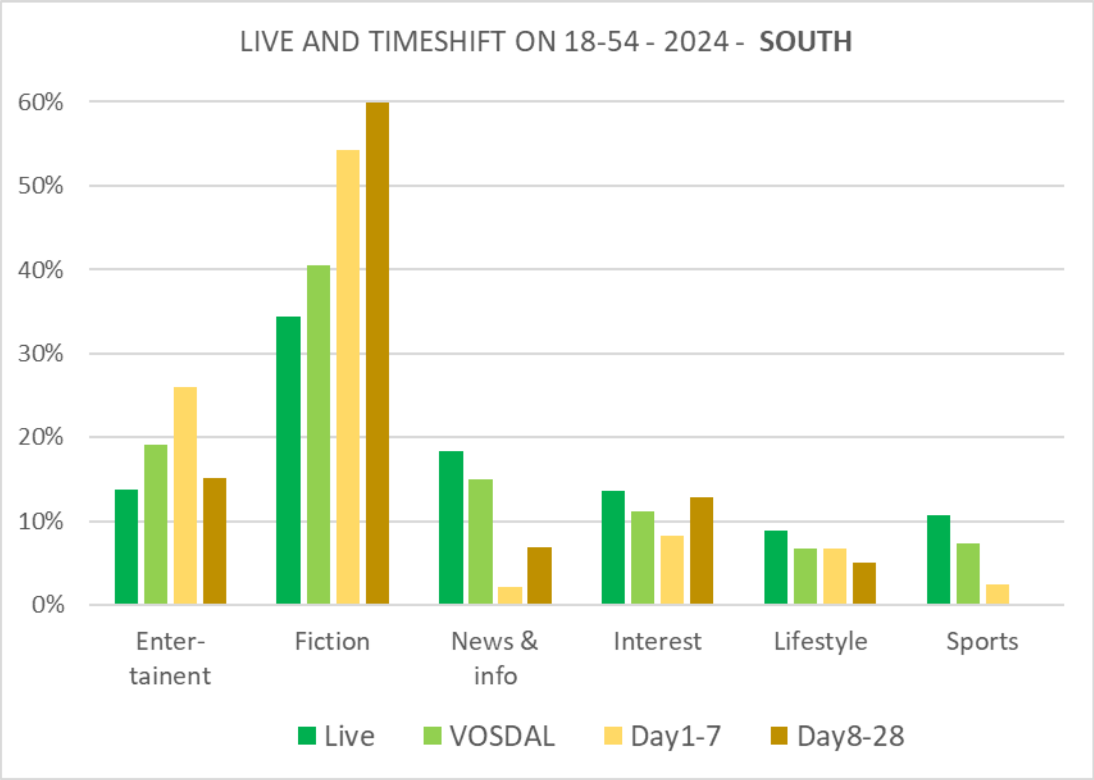


TYPE OF CONTENT IN THE DIFFERENT VIEWING MODES

Some content is easier to watch on demand than others.
News and sports programs have a sense of urgency, they have value in the now. News is quickly replaced by the next news and in sports the live element builds up the tension.

Now that we also have an extended window of 3 weeks after the first week, the differences that are already present in the first "catchup week" are accentuated. Entertainment seem to loose some interest after the first week.





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

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 2024 football is back, but it does not top the list – that honor is for “Kamp Waes”. Next are the matches of the Red Devils during the Euro 2024. Only one cycling competition made the top 25 (“De ronde van Vlaanderen” at nr24).

While “The Masked Singer” was nr 1 for two years in a row is drops now to nr 8 as the only VTM program. VRT1 occupies 6 places in the top10 and PLAY4 has again his spot with “The mol”.
On place 10 we have “Kastaars!”, broadcasted in simulcast on VRT1, VTM and PLAY4.

As for the rest of the ranking, it is all VRT1 except for “De Slimste mens”. VRT ends up with 21 spots in the top 25..

NORTH	Programme	Channel	2024	Average in 000
1	KAMP WAES	VRT 1	03/03/2024	1953,5
2	VB. EK. 1/8F - FRANKRIJK/BELGIE	VRT 1	01/07/2024	1911,1
3	VB. EK. SCHIFT - BELGIE/ROEMENIE	VRT 1	22/06/2024	1730,4
4	VB. EK. SCHIFT - BELGIE/SLOVAKIJE	VRT 1	17/06/2024	1684,2
5	CHANTAL	VRT 1	04/02/2024	1635,0
6	VB. EK. SCHIFT - OEKRAINE/BELGIE	VRT 1	26/06/2024	1634,8
7	DE MOL	PLAY4	24/03/2024	1523,8
8	THE MASKED SINGER	VTM	20/09/2024	1480,3
9	JULIET	VRT 1	03/03/2024	1478,8
10	KASTAARS!	VRT 1/VTM/PLAY4	27/01/2024	1441,7
11	GEUBELS GAAT IN BAD	VRT 1	14/01/2024	1399,8
12	VB. EK. FIN - SPANJE/ENGELAND	VRT 1	14/07/2024	1356,1
13	CHATEAU PLANCKAERT	VRT 1	10/03/2024	1318,5
14	KAMAL KHARMACH, MAG IK EVEN?	VRT 1	01/01/2024	1312,0
15	DE COLUMBUS	VRT 1	08/12/2024	1307,4
16	DE DROOMFABRIEK	VRT 1	03/02/2024	1279,1
17	FACTCHECKERS	VRT 1	03/01/2024	1277,9
18	VREDE OP AARDE	VRT 1	01/01/2024	1276,0
19	DE SLIMSTE MENS TER WERELD	PLAY4	19/12/2024	1273,2
20	ANDERMANS ZAKEN	VRT 1	29/02/2024	1259,6
21	THUIS	VRT 1	02/01/2024	1214,0
22	HET 7 UUR-JOURNAAL	VRT 1	01/07/2024	1178,3
23	VB. EK. 1/2F - NEDERLAND/ENGELAND	VRT 1	10/07/2024	1164,5
24	WIELRENNEN. RONDE VAN VLAANDEREN H.	VRT 1	31/03/2024	1226,0
25	VB. EK. 1/2F - SPANJE/FRANKRIJK	VRT 1	09/07/2024	1093,8

TV : **Live+28+Guests+OVC** = number of viewers 4+ and guests, live + time shifted viewing up to 28 days after broadcast, plus all online viewing of the program on other screens

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

Reminder : 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 always very dominant with no less than 15 places in the Ranking. This has of course all to do with Euro championship, with the matches of the Red Devils topping the list.
The opening ceremony of the Olympics is at 21.

When looking at the remainder spots, News & special editions take 6 slots. “HPI, haut potential” is the only classic series in the list.
The French channel TF1 also appears once in the ranking, this time with a musical show.

SOUTH	Programme	Channel	2024	Average in 000
1	FOOT. CHAMP.E. 1/8F - FRANCE/BELGIQUE	La Une	01/07/2024	1326,1
2	FOOT. CHAMP.E. ELIM. - UKRAINE/BELGIQUE	La Une	26/06/2024	1241,6
3	FOOT. CHAMP.E. ELIM. - BELGIQUE/ROUMANIE	La Une	22/06/2024	1215,0
4	FOOT. CHAMP.E. ELIM. - BELGIQUE/SLOVAQUIE	La Une	17/06/2024	1167,8
5	FOOT. CHAMP.E. FIN - ESPAGNE/ANGLETERRE	La Une	14/07/2024	900,5
6	FOOT. CHAMP.E. 1/2F - ESPAGNE/FRANCE	Tipik	09/07/2024	795,4
7	RTL INFO EDITION SPECIALE - NEIGE ET VERGLAS	RTL tvi	17/01/2024	790,9
8	FOOT. CHAMP.E. 1/4F - PORTUGAL/FRANCE	Tipik	05/07/2024	765,1
9	LE 19.30	La Une	01/07/2024	764,6
10	EDITION SPECIALE - LE 19.30	La Une	17/01/2024	695,5
11	FOOT. CHAMP.E. ELIM. - ESPAGNE/ITALIE	Tipik	20/06/2024	654,1
12	FOOT. CHAMP.E. 1/2F - PAYS-BAS/ANGLETERRE	Tipik	10/07/2024	637,2
13	RTL INFO 19H	RTL tvi	16/01/2024	634,3
14	ENFOIRES 2024, ON A 35 ANS!	TF1	01/03/2024	620,2
15	FOOT. CHAMP.E. ELIM. - PAYS-BAS/FRANCE	Tipik	21/06/2024	612,2
16	JEUDI EN PRIME	La Une	07/11/2024	601,0
17	FOOT. CHAMP.E. 1/4F - ESPAGNE/ALLEMAGNE	Tipik	05/07/2024	592,4
18	FOOT. AMICAL - ANGLETERRE/BELGIQUE	RTL tvi	26/03/2024	580,0
19	FACE AU JUGE	RTL tvi	24/03/2024	578,4
20	HPI, HAUT POTENTIEL INTELLECTUEL	La Une	07/05/2024	549,2
21	J.O. 2024 CEREMONIE D'OUVERTURE	La Une	26/07/2024	549,1
22	FOOT. AMICAL - BELGIQUE/LUXEMBOURG	La Une	08/06/2024	547,8
23	FOOT. CHAMP.E. ELIM. - ALLEMAGNE/ECOSSE	La Une	14/06/2024	543,1
24	ELECTIONS 2024, LA SOIREE ELECTORALE	La Une	09/06/2024	540,6
25	FOOT. AMICAL - BELGIQUE/MONTENEGRO	La Une	05/06/2024	539,3

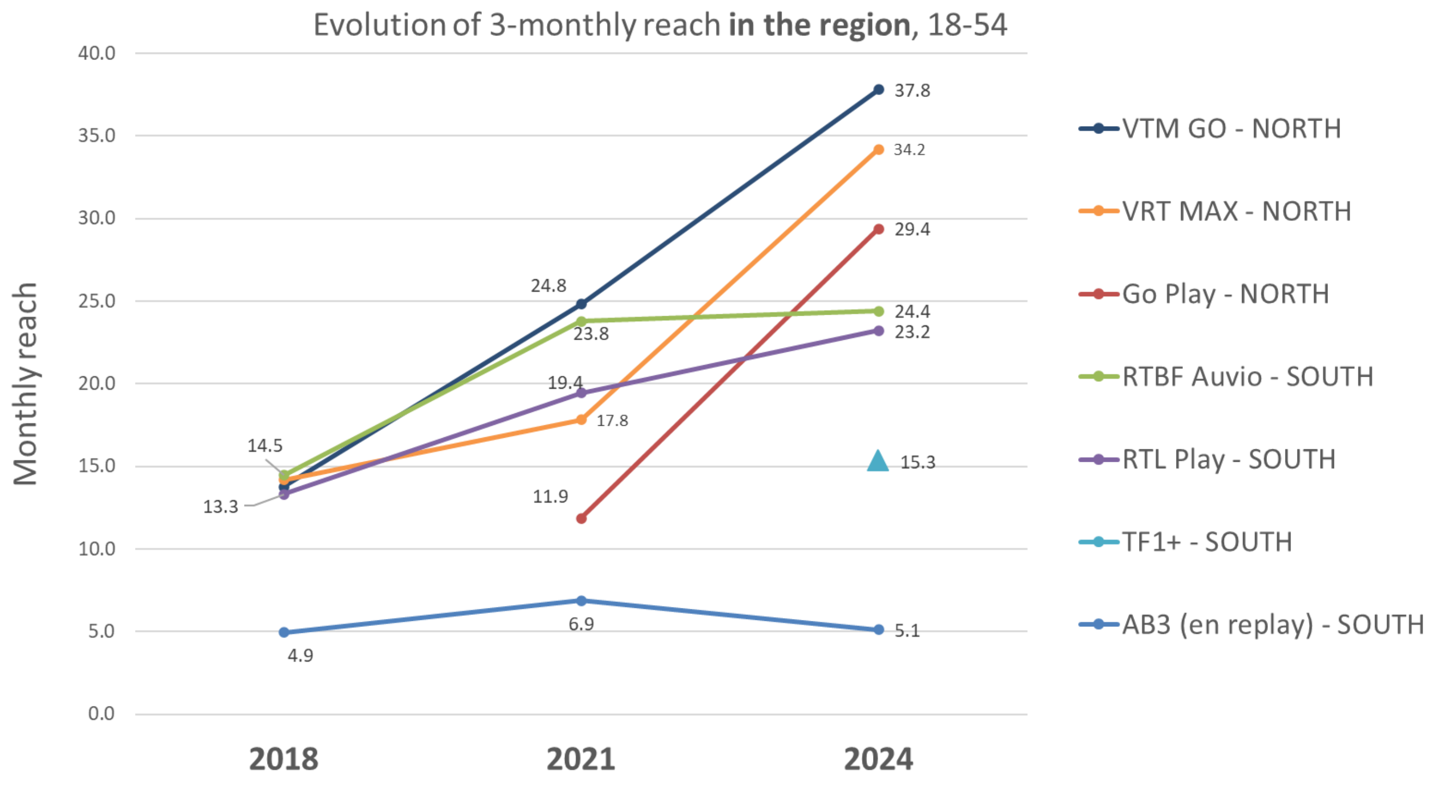
TV : **Live+7+Guests+OVC** = number of viewers 4+ and guests, live + time shifted viewing up to 7 days after broadcast, plus all online viewing of the program on other screens

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. Most of these BVOD platforms (Broadcaster Video On Demand) focus exclusively on video and offer full episodes of programs, often also older content. The public broadcasters also offer their radio channels in the same apps.

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,
The reach potential has become considerable over the years and offers an excellent complement to the “normal” broadcast.



Source : Video Observer

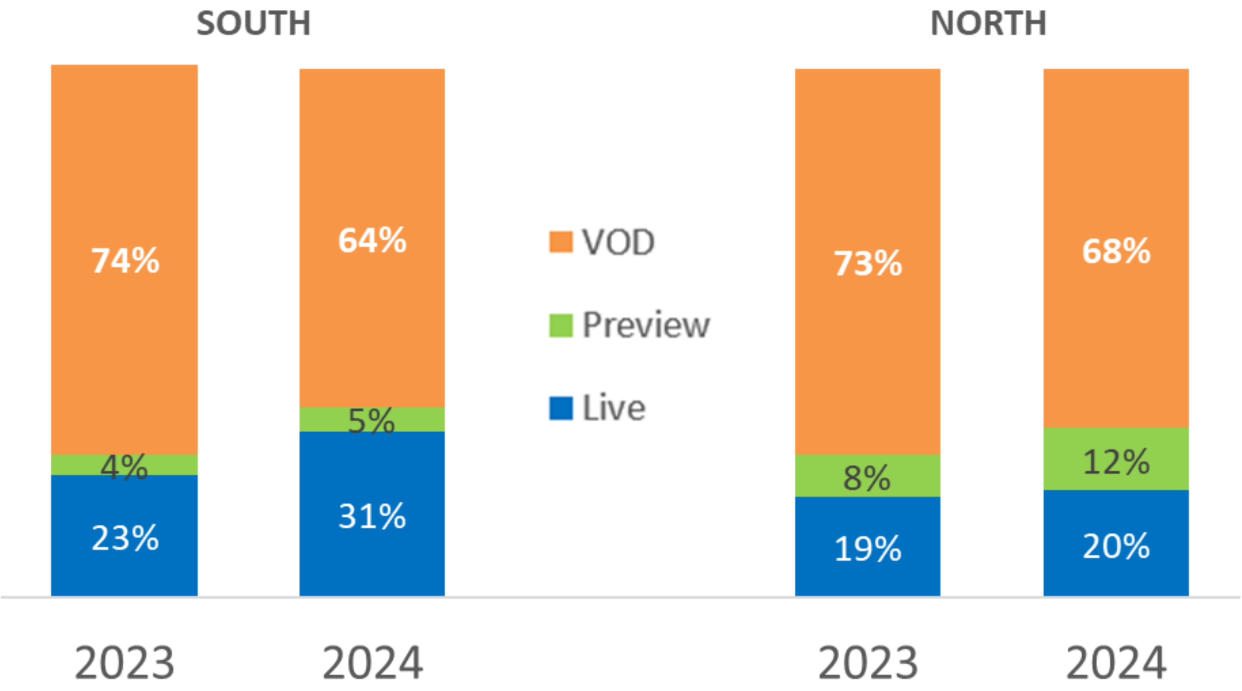
ONLINE VIEWING OF TV CONTENT

The BVOD platforms sometimes offer programs in preview and even allow to bingewatch episodes before they are scheduled for live broadcast.

Previewing is clearly on the rise.

It is of course also possible to watch live TV online – but most viewing is in VOD modus (viewing on demand), on the time and place of the consumer.
Close to 2/3 of the recognised views is on demand in the month after broadcast.

Online viewing time modus



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

TOP 25 ONLINE VIEWING OF TV CONTENT IN 2024

The picture is very different in the North versus the South. Live sports are typically watched "on the go", and they totally dominate the ranking in the South while we only find 3 football events in the North (the Belgian matches at Euro 2024).

In the North watching a TV programme online on your own time and has been largely adopted. Top programs that are a succes on the big screen find their way to the other screens.

NORTH		Programme	Channel	Aired	Average in 000
1	LAURA TESORO	Meer dan een droom	VTM	07/11	229 966
2	KAMP WAES	Kamp Waes	VRT 1	11/02	167 188
3	DE MOL	DE MOL	PLAY VIER	24/03	136 750
4	THE MASKED SINGER	Samson en Marie (Space	VTM	08/11	102 810
5	DE SLIMSTE MENS	DE SLIMSTE MENS TER	PLAY VIER	14/10	97 007
6	KOMEN ETEN	KOMEN ETEN S20 9 - 1/3	PLAY VIER	16/09	96 595
7	JULIET	De verloren zoon	VRT 1	31/03	95 685
8	DE VERHULSTJES	DE VERHULSTJES S6 1 -	PLAY VIER	09/11	95 093
9	HET CONCLAAF	Het Conclaaf-Aflevering	VTM	16/05	88 878
10	KAMP JEROOM	KAMP JEROOM S1 1 - 1/2	PLAY VIER	30/09	86 458
11	ONDER VUUR	Afscheid	VRT 1	29/12	78 990
12	THUIS	Thuis	VRT 1	29/03	76 717
13	VOETBAL EK 1/8F	France - Belgique	VRT 1	01/07	76 025
14	EXPEDITIE GOORIS	Expeditie Gooris in	VTM2	08/01	75 701
15	CHANTAL	Wie is Miguel?	VRT 1	21/01	74 484
16	VOETBAL EK SCHIFT	Ukraine - Belgique	VRT 1	26/06	73 406
17	STERREGEM	Sterregem-Aflevering 1 -	VTM	16/10	73 318
18	HET PROCES	dat niemand wou	VRT CANVAS	03/04	72 941
19	EERSTE KEUS	PIKOH Hasselt	VRT 1	26/05	72 865
20	NONKELS	NONKELS 2 1 - 1/2	PLAY VIER	18/04	70 979
21	KAMAL KHARMACH	Mag ik even?	VRT 1	01/01	69 858
22	EERSTE KEUS	GO KAZ Zottegem	VRT 1	27/05	66 859
23	NONKELS	NONKELS 2 4 - 1/2	PLAY VIER	09/05	66 577
24	VOETBAL EK SCHIFT	Belgique - Slovaquie	VRT 1	17/06	66 051
25	MILO	Milo - Aflevering 1 - 1/3	VTM	05/01	64 139

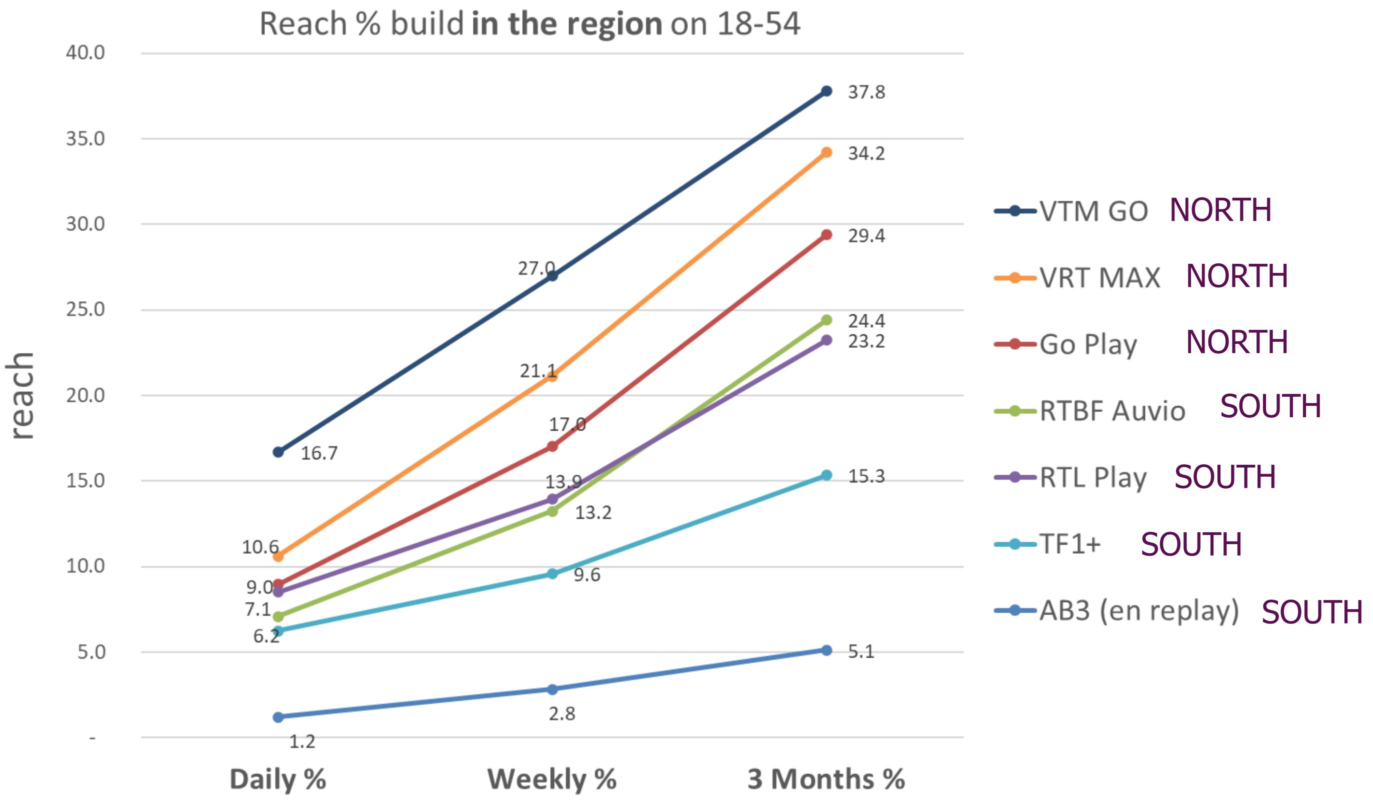
SOUTH		Programme	Channel	Aired	Average in 000
1	FOOT. CHAMP.E. 1/8F	France - Belgique	LA UNE	01/07	86 858
2	FOOT. CHAMP.E. ELIM.	Ukraine - Belgique	LA UNE	26/06	74 179
3	FOOT. CHAMP.E. 1/2F	Espagne - France	TIPIK	09/07	68 301
4	FOOT. CHAMP.E. ELIM.	Belgique - Slovaquie	LA UNE	17/06	64 586
5	FOOT. CHAMP.E. ELIM.	Belgique - Roumanie	LA UNE	22/06	61 173
6	FOOT. CHAMP.E. FIN	Espagne - Angleterre	LA UNE	14/07	59 868
7	FOOT. CHAMP.E. 1/4F	Portugal - France	TIPIK	05/07	56 955
8	FOOT. CHAMP.E. ELIM.	Espagne - Italie	TIPIK	20/06	46 290
9	FOOT. CHAMP.E. 1/2F	Pays-Bas - Angleterre	TIPIK	10/07	44 868
10	FOOT. CHAMP.E. 1/4F	Espagne - Allemagne	TIPIK	05/07	41 584
11	FOOT. CHAMP.E. 1/8F	Angleterre - Slovaquie	TIPIK	30/06	34 658
12	FOOT. CHAMP.E. ELIM.	Pays-Bas - France	TIPIK	21/06	34 444
13	FOOT. CHAMP.E. 1/8F	Espagne - Géorgie	TIPIK	30/06	34 343
14	FOOT. CHAMP.E. ELIM.	Croatie - Italie	TIPIK	24/06	33 968
15	FOOT. CHAMP.E. 1/8F	Suisse - Italie	TIPIK	29/06	33 335
16	FOOT. CHAMP.E. 1/4F	EURO 2024	TIPIK	06/07	32 342
17	FOOT. CHAMP.E. ELIM.	Portugal -Tchéquie	TIPIK	18/06	31 994
18	FOOT. CHAMP.E. ELIM.	Autriche - France	TIPIK	17/06	31 872
19	F1. GP. BRESIL	Brésil	TIPIK	03/11	30 280
20	F1. GP. MONACO	Grand Prix F1 de Monaco	LA UNE	26/05	27 791
21	FOOT. CHAMP.E. ELIM.	Serbie - Angleterre	TIPIK	16/06	27 748
22	FOOT. CHAMP.E. 1/8F	Portugal - Slovénie	TIPIK	01/07	27 452
23	FOOT. CHAMP.E. 1/4F	Angleterre - Suisse	TIPIK	06/07	27 368
24	FOOT. CHAMP.E. ELIM.	Suisse - Allemagne	TIPIK	23/06	27 364
25	FOOT. CHAMP.E. 1/8F	Allemagne - Danemark	TIPIK	29/06	26 944

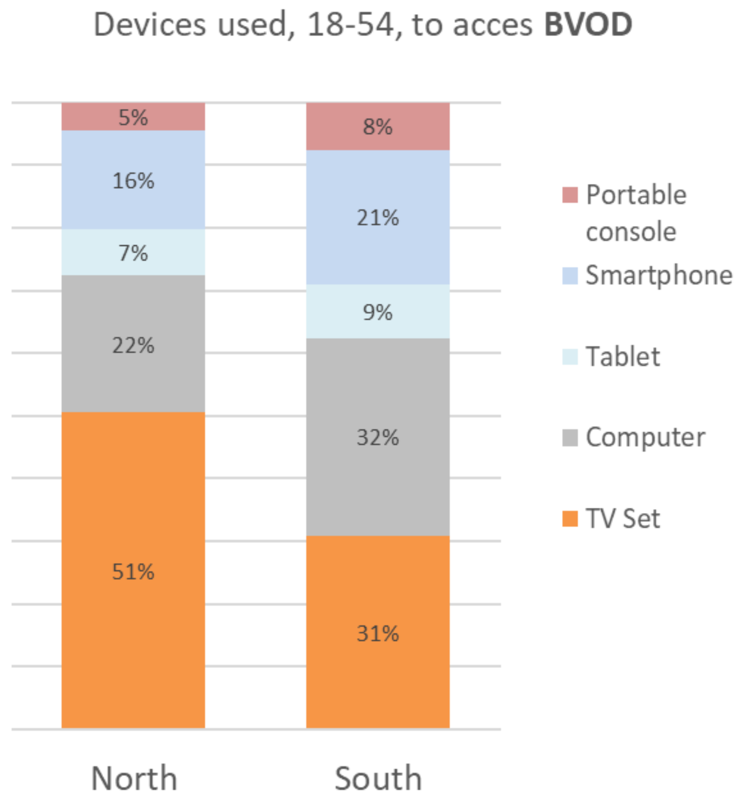
Source : CIM OVC, all viewing (Domestic & Foreign), total population

BROADCASTER PLATFORMS - BVOD

While the reach on a single day is still limited, it builds strongly when looking at the weekly or longer basis. The public broadcasters (VRT Max and Auvio) continue to add extra reach more than the other platforms – this might be due to their more diverse offer.

As these BVOD platforms are online they can be accessed on all internet connected devices. In the North, already half of the volume happens on a "connected TV". In the south, the computer is still most popular.



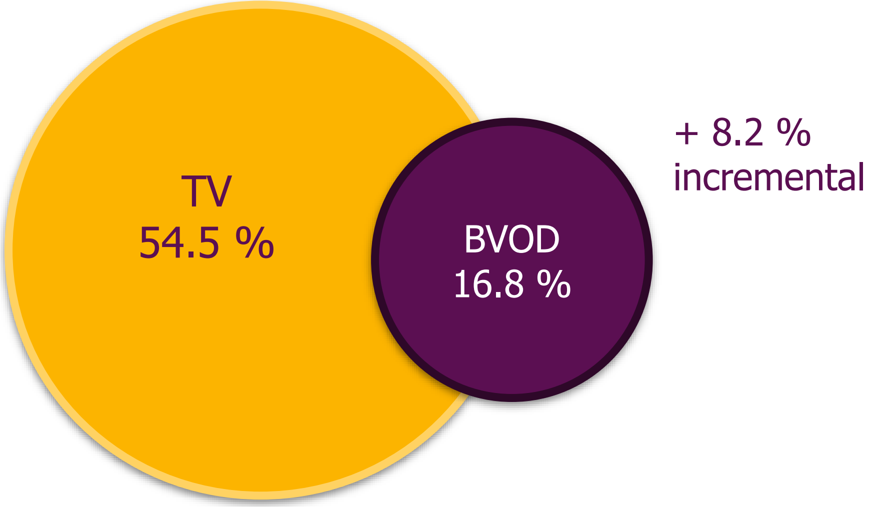


BVOD CREATES EXTRA REACH FOR TV ADVERTISING

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

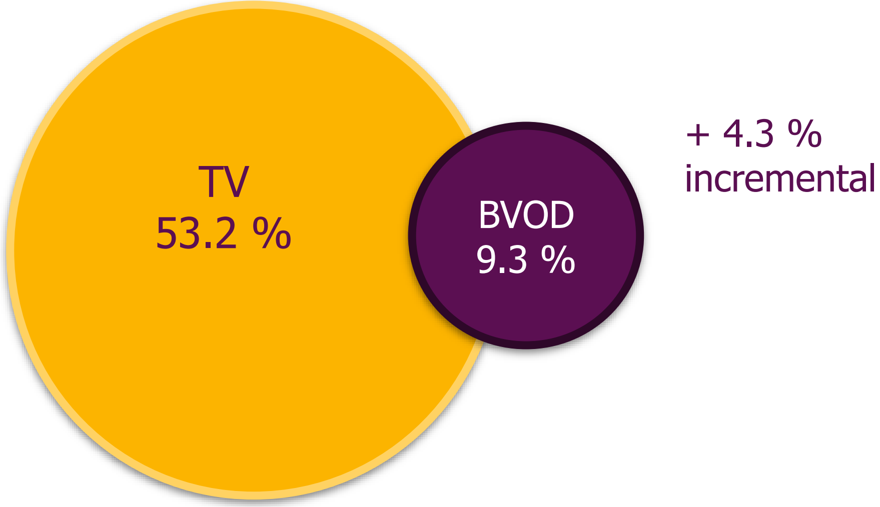
The CIM ToVA planner allows to calculate the combined reach of BVOD with TV for an average campaign on the target group 18-54. The plan below is based on a campaign of 330 GRP with a split TV/BVOD of 84/16 in the North and 90/10 in the South.
With only a little switch from TV to BVOD, the reach grows with +8.2% in the North and +4.3% In the South.

NORTH



TOTAL REACH 62.7 %

SOUTH



TOTAL REACH 57.5 %

Source : CIM ToVA planner, on 18-54, April 2024. 330 grp. Budget split : TV/BVOD : : 90/10 in the South and 84/16 in the North

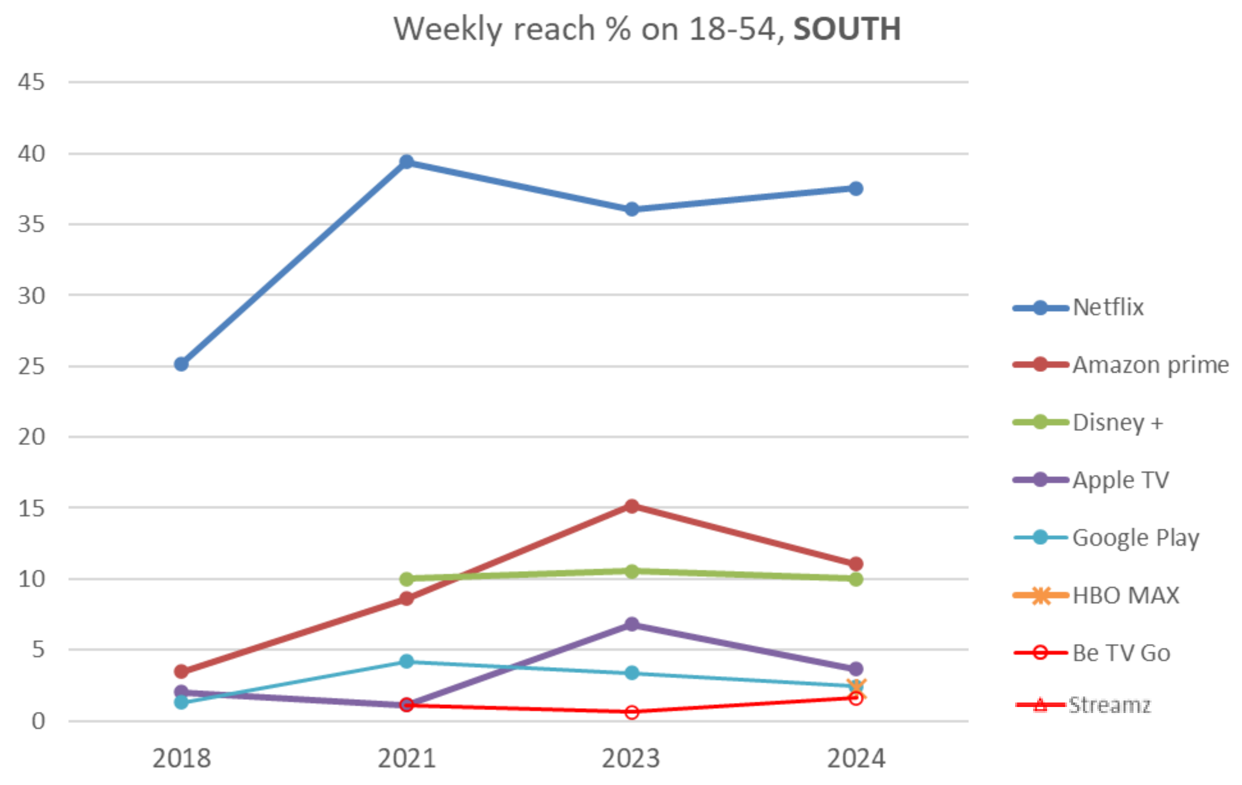
6. OTHER CONTENT : STREAMING SERVICES

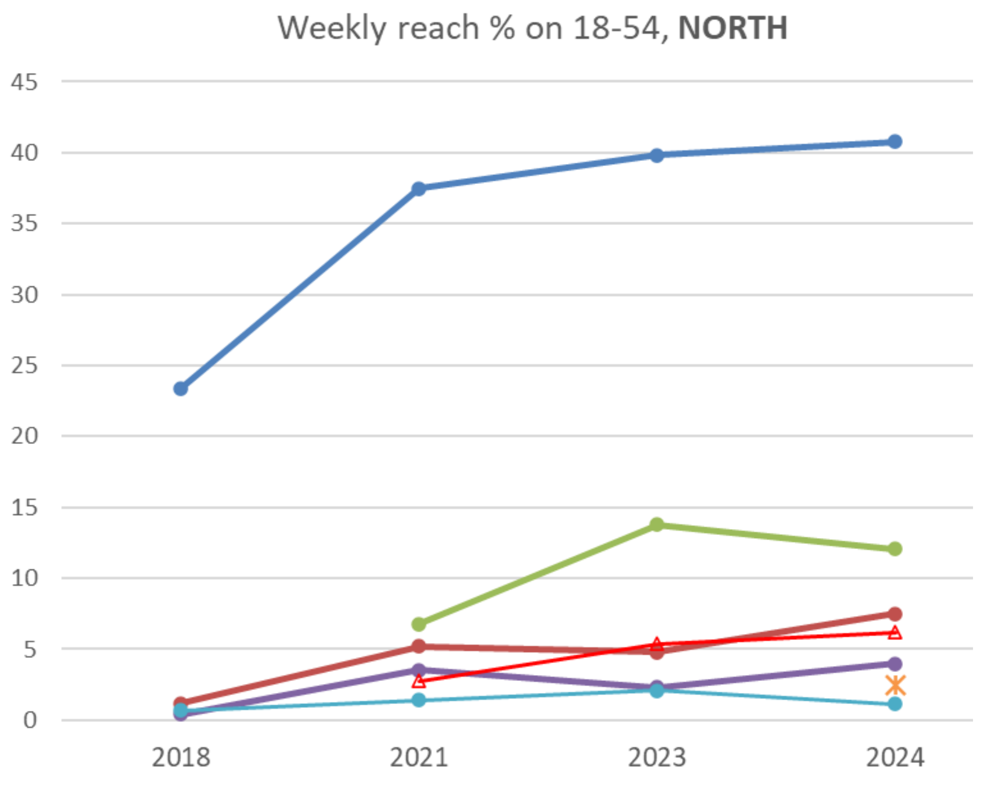
EVOLUTION OF STREAMING SERVICES OVER TIME

The actual TV measurement method does not allow to identify the platforms yet but declarative surveys like Video Observer can give an idea of their relative importance and evolution.

Overall the platforms seem to plateau, but Netflix is in best shape, with a little more succes in the North.

Disney is going down in both regions, but remains nr 2 in the North.
In te South, Amazon Prime is close to loosing its 2nd place.
New in the list is HBO, with limited succes at this stage.
Finally, 2 local platforms get some interest, with Streamz in the North competing with Amazon for 3rd place.





Source : Video Observer, 18-54y

PROFILE OF THE STREAMING SERVICES IN 2024

Streaming services appeal to a younger audience and they all have a specific profile.

As Netflix is the bigger one, its profile is closer to the population, still its proportion of 18-24 is double of the population. Streamz, HBO MAX and Apple Tv have even more.

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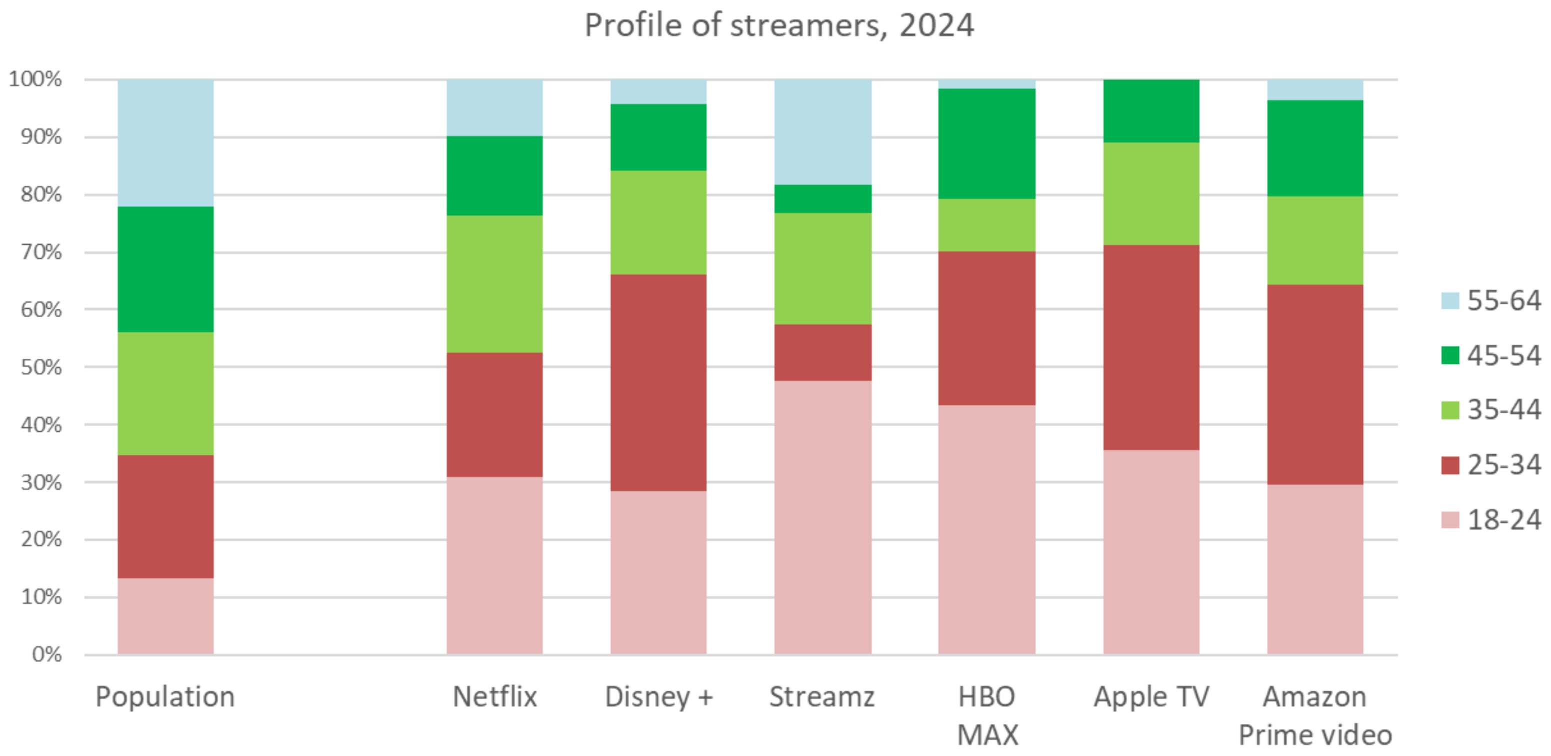
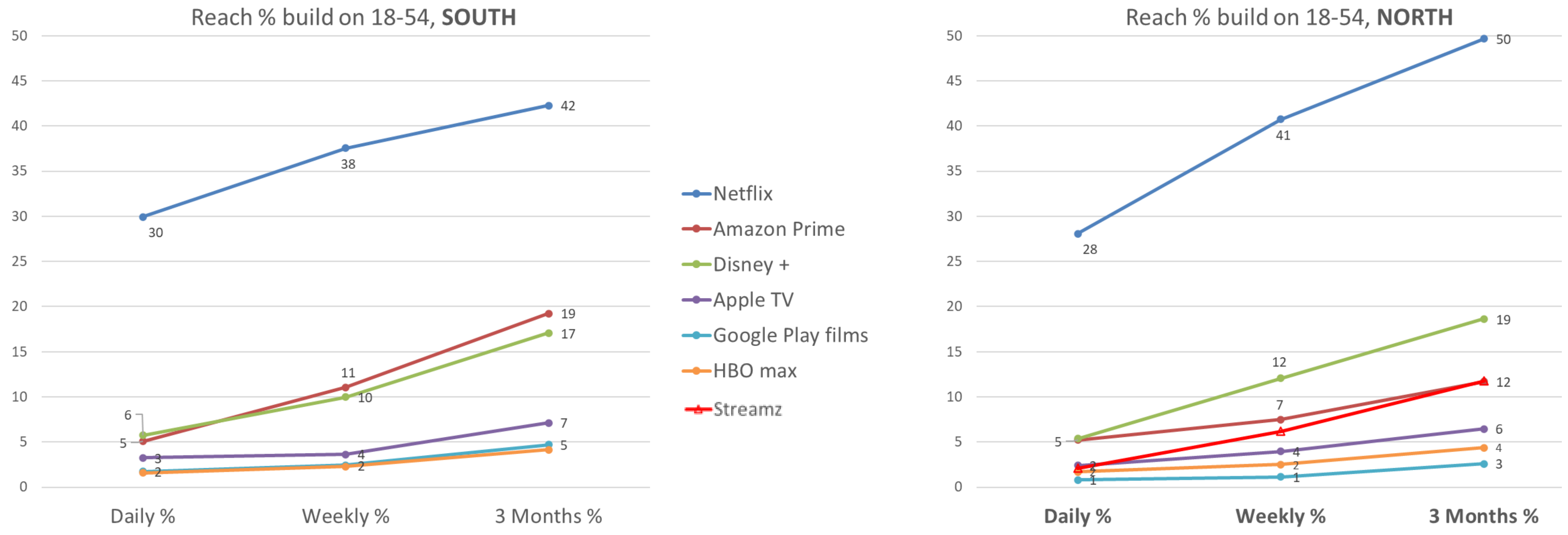


Source : Video Observer 2024

REACH POTENTIAL IN 2024

Even if the streamers are a succes, the market leader Netflix only reaches about half of the 18-54 population. And the 2nd position not more than 20%.

Overall we see a bigger adoption of the platforms in the North. Netflix is clearly the leader.



Source : Video Observer 2024, 18-54y

VIA TV Report 2024

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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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