

# The launch of the new Dutch RAM

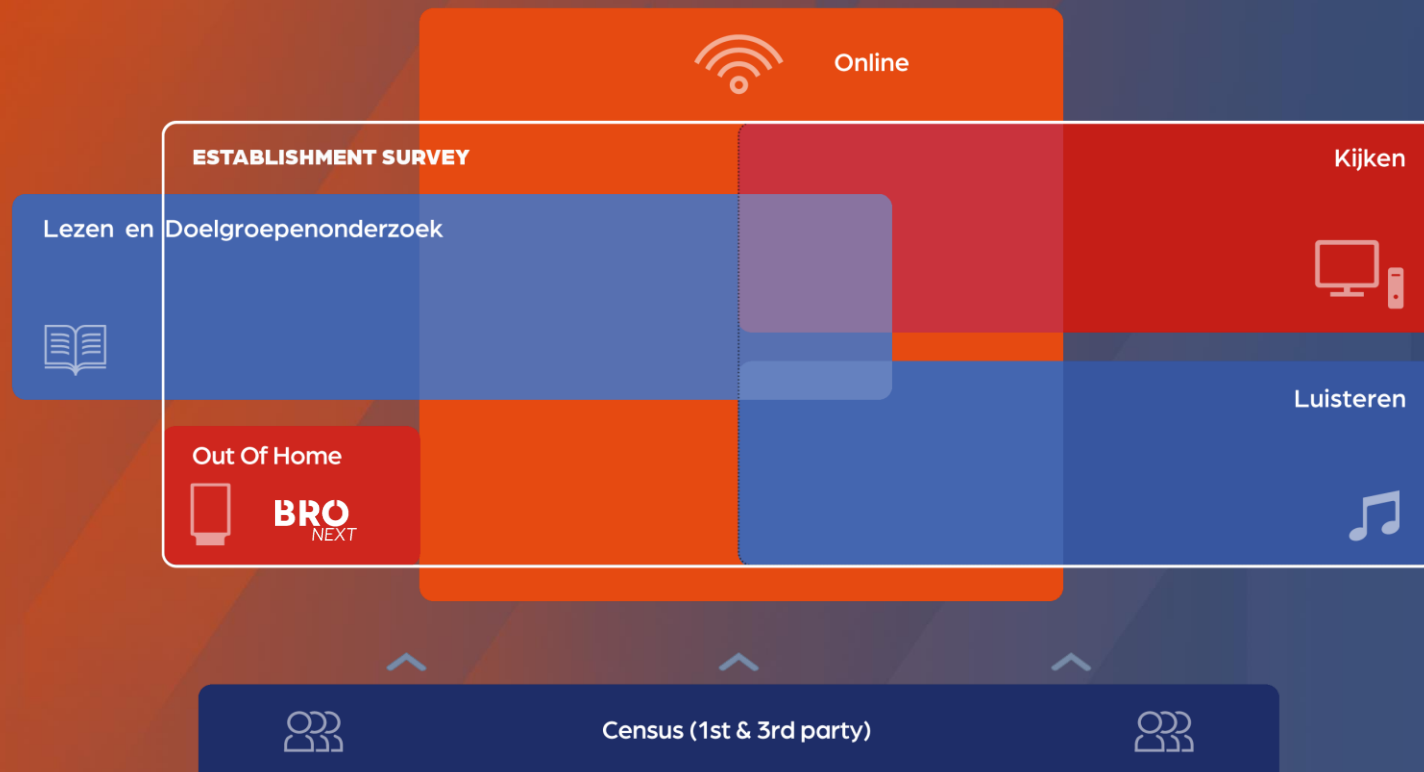
**Frans Kok (Nationaal Media Onderzoek / NMO)**

Mediapulse AG / Thinking Outside the Box, Zurich, 14 March 2024

# NMO in short

- The National Media Research (NMO) is a merger (Super-JIC) of the following organizations responsible for media audience measurement in The Netherlands:
  - NLO (listening, audio trading currency)
  - NOM (reading, print trading currency)
  - SKO (viewing, video trading currency)
  - VINEX (digital, digital trading standard)
- BRO (OOH trading currency) will join NMO in the course of 2024.
- Overall goals of the NMO project:
  - Cross media insights
  - High quality data, state of the art methodologies
  - GDPR / e-compliance standards
  - Efficiency
  - Future-proof

# NMO Cross-media architecture



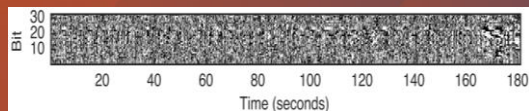
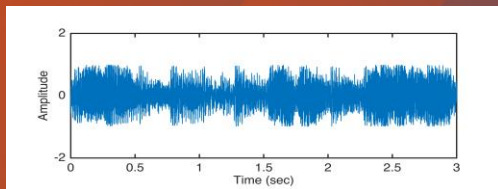
# NMO listening

- Primary goal: measure listening behaviour for the radio currency.
  - Minute-by-minute measurement, on same level as TV.
  - More stations measured (+/- 100), including TV-stations.
  - Passive electronic measurement with Ipsos' MediaCell app on a smartphone.
  - Including digital measurement with RealityMine in MediaCell+.
- 
- Recruitment by Kantar Media.
  - Multimedia panel of n=3.100 panellists, representative of NL 13+.
  - 18+ age group via MediaCell+.
  - 13-17 age group via e-diary.
  - Weekly delivery of integrated 13+ data.
  - More granularity: previous week, per day, minute-by-minute reporting.



# Measurement technology: audio matching

- MediaCell app detects the audio signal and provides a snapshot / fingerprint, which is matched against a reference audio channel.

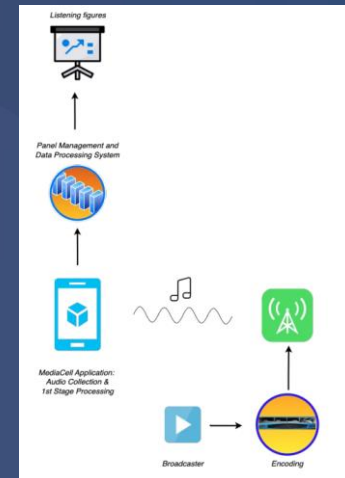


audio fingerprint of the  
original audio signal

matching with the reference

# Measurement technology: encoding

- In addition to audio matching, encoding (watermarking) is used.
- Real-time encoders are incorporated in the broadcast audio signal of the radio stations.
- The code is not audible to the human ear.
- Since February encoding is not only used for platform detection, but also for the measurement of listening (currency). This adds 6% listening time on average.



# Measurement technology: RealityMine

- Ipsos works with RealityMine for measuring digital behaviour on a smartphone.
- RM measurement is integrated into MediaCell app: MediaCell+.
- Listening to radio and music on a smartphone is measured, including listening with headphones on.
- Only whitelisted websites and apps are reported.



# What is being measured?





# 13-17 age group: e-diary

- Difficult-to-recruit target group in general:
  - Parents' consent
  - More privacy issues
- Restrictions imposed by Apple for tracking apps in Apple store (< 18 age group).
- E-diary was designed especially for this group.
- Per-minute level measurement.
- Radio listening, music streaming services, podcasts.
- Compliance: 7 days completed diaries.
- 8 week e-diary data are adjusted to MC data levels, then integrated with MC+ weekly data.

**NMO Multimedia Panel**

Heb jij naar een van de volgende radiozenders geluisterd op maandag 30 januari?

 NPO Radio 1	 NPO 3FM	 Radio Veronica	 100% NL	 XINK
 NPO Radio 2	 Q-music	 SLAM!	 Sky Radio	 Radio 538
 Radio 10	 Anders	Ik heb deze dag niet naar de radio geluisterd		

volgende

**NMO Multimedia Panel**

**Luistermoment 1**  
Van hoe laat tot hoe laat heb je maandag naar **NPO Radio 2** geluisterd?

Heb je **meerdere** momenten geluisterd, dan kun je deze invullen door op [volgende] te klikken.

*Gebruik een punt bij het invullen van de tijden, zoals bijvoorbeeld 08.10, 12.03 of 20.00, en gebruik de 24-uurs notatie. Heb je bijvoorbeeld om 7 uur 's avonds geluisterd, dan vul je 19.00 uur in.*

Van: Tot:

Waar heb je geluisterd naar NPO Radio 2?

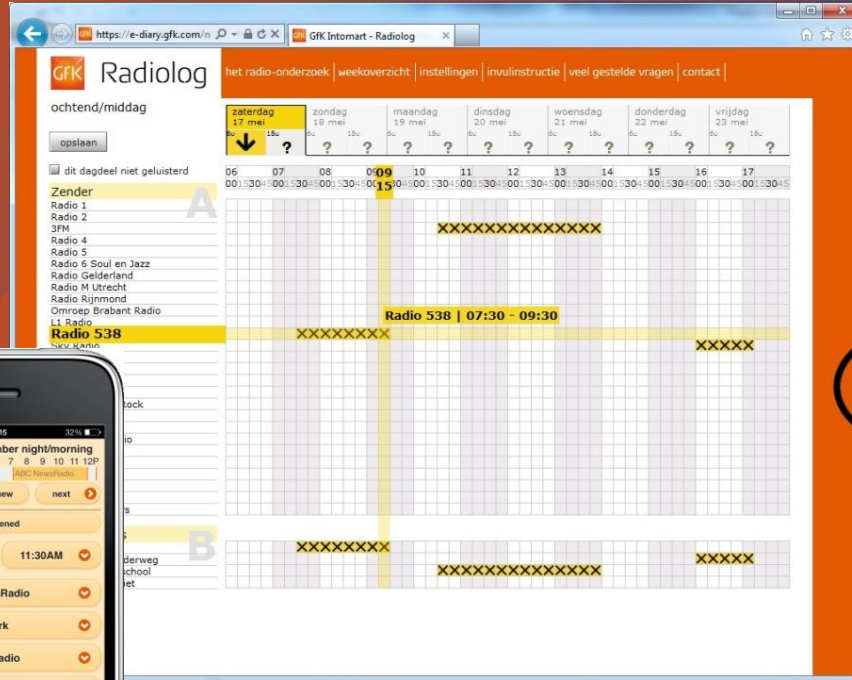
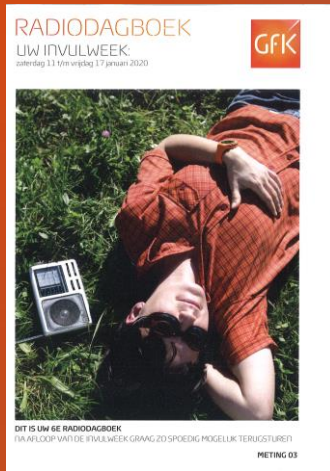
☐ Thuis

☒ Auto/onderweg

☐ School/werk

☐ Ergens anders/weet niet

# From diary to passive electronic measurement

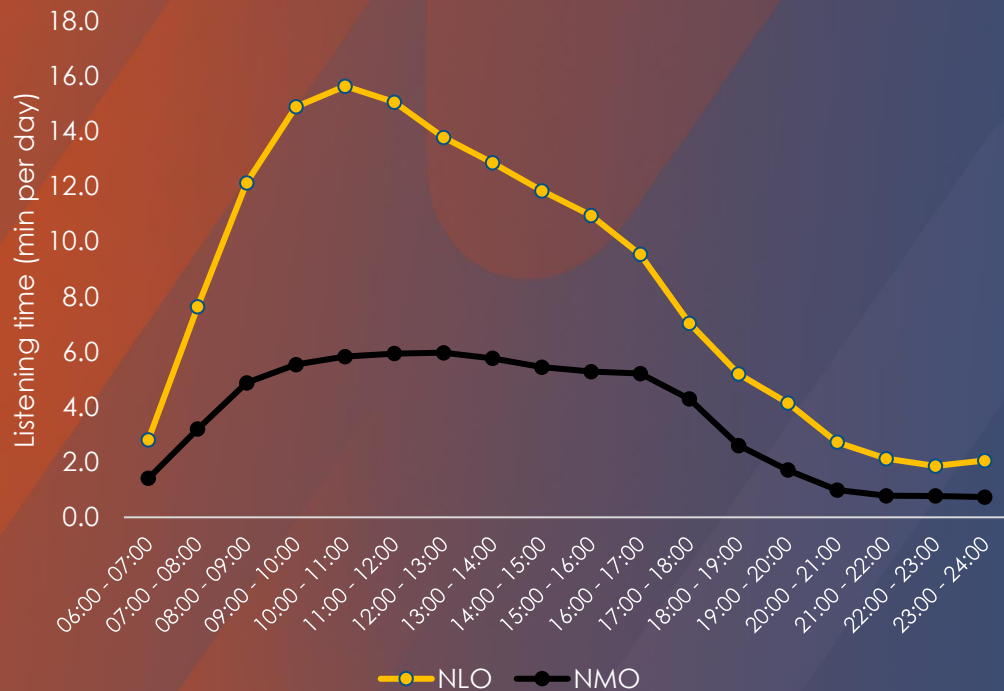


# Transition from diary → electronic measurement

- New definition of radio listening:
  - From listening according to a respondent to technically audible for a meter.
  - That changes also the currency.
- Overall picture (and in line with international cases):
  - More dynamics in ratings
  - Daily reach: comparable
  - Weekly reach: higher
  - Number of listening sessions: more
  - Average listening time per session: less
  - Average listening time: less (minute-by-minute data, no memory effects)
- **Listening behaviour is not changed in the Netherlands: the same impact with the same budget.**

# Less reported listening time

Average listening time hour-by-hour  
Monday – Sunday | 06:00 – 24:00



Source: NLO GfK Intomart (NLO, jan\_feb 22) & Nationaal Media Onderzoek (NMO, jan 23)

# NLO Board meeting (2020)

- *“We all agree that reality does not change, but that we measure it in a new, innovative way.”*
- *“We all agree that the radio market should not collapse because of the new research. Radio will remain as powerful as it is now.”*
- bvA (advertisers) and PMA (media agencies) asked NLO for a transition tool/index: an index to gain insight into the difference in results between the new and the old measurement.
- Purely as a source of information. It does not oblige any party to any commercial activity. That is not up to NLO.



# Transition index of average listening time

- Index to gain insight into the difference in results between the new and the old measurement.
- Purely as a source of information. It does not oblige any party to any commercial activity.
- Widely used by the market.

Transitie Index NMO Luisteronderzoek					
Zender	Ma-Zo 6-24/ doelgroep 13+	Zender	Tijdvak	Doelgroep	Index
NPO Radio 1	189	NPO Radio 1	Ma-Zo 06-24	46-67	202
NPO Radio 2	210	NPO Radio 2	Ma-Zo 06-24	25-67	205
NPO 3FM	202	NPO 3FM	Ma-Zo 06-24	25-45	318
NPO Klassiek	341	NPO Klassiek	Ma-Zo 06-24	55+	325
NPO Radio 5	214	NPO Radio 5	Ma-Zo 06-24	55+	198
Sky Radio	192	Sky Radio	Ma-Zo 06-24	20-49	246
Radio Veronica	168	Radio Veronica	Ma-Zo 06-24	20-49	164
Radio 10	195	Radio 10	Ma-Zo 06-24	20-49	156
Radio 538	200	Radio 538	Ma-Zo 06-24	20-49	246
100%NL	198	100%NL	Ma-Zo 06-24	20-49	220
SLAM!	308	SLAM!	Ma-Zo 06-24	20-49	362
Sublime	191	Sublime	Ma-Zo 06-24	20-49	395
Radio Decibel	124	Radio Decibel	Ma-Zo 06-24	20-49	131
Qmusic	208	Qmusic	Ma-Zo 06-19	20-49	214
KINK	578	KINK	Ma-Za 06-24	20-34	463
ClassicNL	215	ClassicNL	Ma-Zo 06-24	13+	215
BNR Nieuwsradio	338	BNR Nieuwsradio	Ma-Zo 06-24	13+	338
EPower Radio	237	EPower Radio	Ma-Zo 06-24	25-67	289
ORN Radio	296	ORN Radio	Ma-Zo 07-19	25-67	320

# Example of how the transition index works

## Same investment means the same number of spots, but GRPs will decline

Example NPO2	NLO	Transition index	NMO
Channel	NPO Radio 2		NPO Radio 2
Month	January		January
Spot length	20 sec		20 sec
Target audience	25-67		25-67
<b>Budget</b>	<b>€ 10.000</b>		<b>€ 10.000</b>
<b>Basic Year Price</b>	<b>€ 125</b>	<b>205</b>	<b>€ 256</b>
Month index	60		60
Market index	100		100
Spot length index	100		100
Package	85		85
Cost per GRP	€ 63,75		€ 130,56
<b>GRPs</b>	<b>157</b>		<b>77</b>
<b>Spots per day</b>	<b>4</b>		<b>4</b>

**The transition index is calculated over the base year price.** In the example, the transition index of NPO Radio 2 has been set at 205. The basic year price will therefore go from € 125 to € 256. Because the listening time decreases with the same index, you end up with the same spot pressure with an identical budget. The number of GRPs is a lot lower with the same budget, so the c/GRP increases.

The impact of the Radio flight stays the same in terms of communication effects such as recognition.



# CESP Audit in 2023



## 1) Methodological audit

- NMO Luisteronderzoek is “fit-for-purpose”, improvements were proposed and adopted

## 2) Technical audit

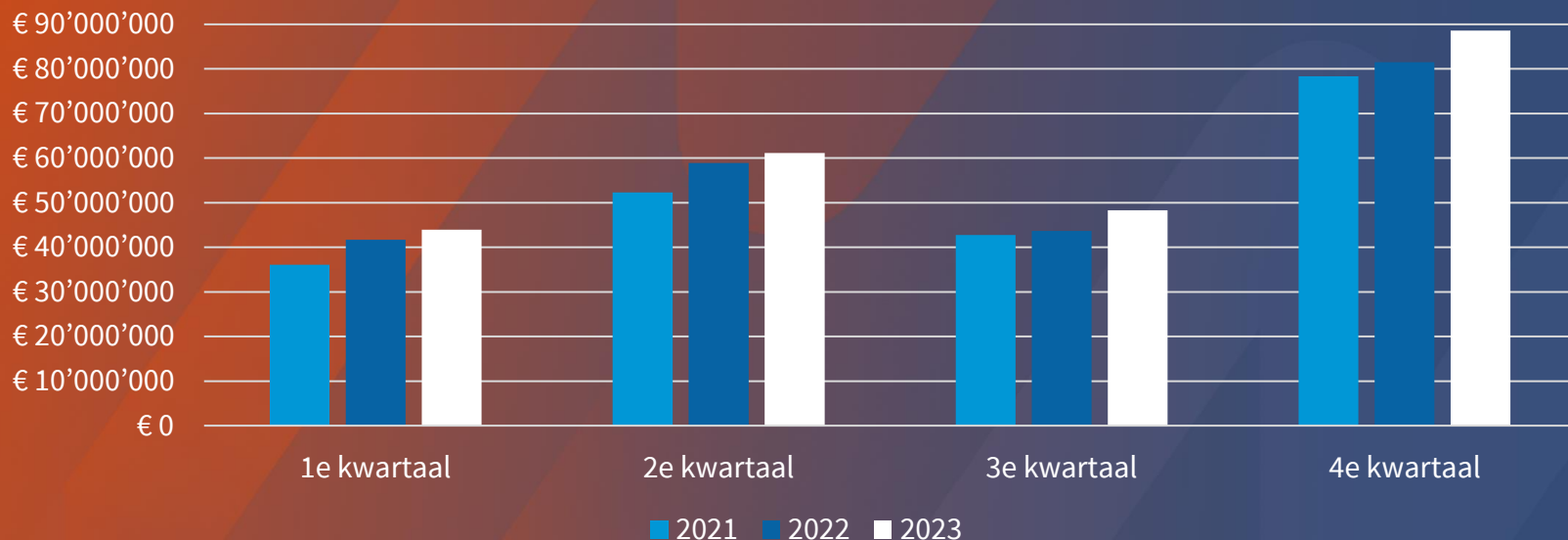
- The reporting rate of the Mediacell+ measurement with 97,1% of all radio sessions is positive.



# Audio advertising investment per quarter

Increase of revenues in every quarter, Q3 largest percentage increase, Q4 largest absolute increase

Total nett: 242 million euro



## PODCAST STANDAARD

JANUARI 2024

## AUDIOTITELS TOP 100

Positie	Rang- wijziging	Audiotitel	Netwerk	Mediabedrijf	Aantal nieuwe afleveringen	Gem. aantal downloaders per week	Gem. aantal gebruikers per week	Teng luister- radio	Categorie
1	—	Boekstijp en de Wijk	FD Mediagroep	BNR Nieuwradio	24	413.885	181.949		
2	—	NRC Vandaag	Mediagroup NRC	Mediagroup NRC	19	308.372	157.906		
3	▲ 3	de Volkskrant Elke Dag	DPG Media	Volkskrant	32	176.107	77.887		
4	—	De Dag	NPO Radio 1	NOS	20	166.143	74.357		
5	▲ 2	Wij.nl nieuws	DPG Media	WU	71	156.824	59.746		
6	▲ 2	538 Nieuws	Talpa Network	538	672	153.224	76.031		
7	▲ 3	De Jortcast	NPO Radio 1	AVROTROS	16	122.033	59.720		
8	▲ 3	Eerst dit	NPO Luister	EO	20	121.652	51.522		
9	▼ -6	Napoleon	FD Mediagroep	BNR Nieuwradio	0	120.876	59.201		
10	▲ 2	NOS Met het Dag op Morgen	NPO Radio 1	NOS	32	117.471	41.910		
11	▲ 2	AD Voetbal podcast	DPG Media	AD	26	115.229	68.258		
12	▼ -7	Vandaag Inside	Talpa Network	SBS6	12	102.674	65.409		
13	▼ -4	De Stemming van Vullings en Van der Walp	NPO Radio 1	NOS/ AVROTROS	3	99.801	76.693		
14	—	Lang verhaal kort	NPO 3FM	NOS op 3	20	96.358	48.850		
15	▲ 2	Nooit meer slapen	NPO Radio 1	VPRO	20	76.935	25.175		
16	—	Parool Misdaadpodcast	DPG Media	Het Parool	2	73.555	45.378		
17	▲ 1	Alleraardige Vragen	NPO Luister	BNWRA	20	68.066	38.024		
18	▼ -3	De Zaak X	DPG Media	AD	2	66.902	34.529		
19	▲ 1	BNR De Wereld	FD Mediagroep	BNR Nieuwradio	21	64.416	34.423		
20	▲ 8	FCA Daily: Alles over voetbal	Audiotitel Podcastnetwerk	FC Aankijken	24	64.224	36.660		
21	▲ 1	De zaak ontfeerd	Audiotitel Podcastnetwerk	Mediagroup Nederland	5	61.551	37.043		
22	▲ 1	Het HLN-nieuws	DPG Media	HLN	76	56.410	23.796		
23	▲ 1	FI aan Tafel	Talpa Network	Grand Prix Radio	4	54.431	41.972		
24	▼ -3	Kick-off met Valentin Driessen	Audiotitel Podcastnetwerk	Mediagroup Nederland	8	54.355	44.121		
25	—	AD Media Podcast	DPG Media	AD	9	53.096	42.876		
26	▲ 8	Strikt Privé	Audiotitel Podcastnetwerk	Mediagroup Nederland	25	51.557	37.384		
27	—	Wetenschap Vandaag	FD Mediagroep	BNR Nieuwradio	43	50.468	23.029		
28	▼ -2	FD Dagkoers	FD Mediagroep	Het Financieel Dagblad	15	48.015	28.324		
29	▲ 2	NRC Onbehaarde Apen	Mediagroup NRC	Mediagroup NRC	3	47.970	31.389		
30	▲ 1	Van de radar	DPG Media	AD	6	46.917	26.019		
31	▼ -1	Europa draait door	NPO Radio 1	VPRO	3	45.998	37.093		
32	▲ 5	Het Misdaadbureau	NPO Radio 1	WNL	5	45.606	24.283		
33	▼ -14	NRC Haagse Zaken	Mediagroup NRC	Mediagroup NRC	4	45.075	34.297		
34	▲ 1	Beurs	FD Mediagroep	BNR Nieuwradio	25	44.810	23.450		



# STREAMING AUDIO STANDAARD

JANUARI 2024

## STATIONS

Positie	Station	Mediabedrijf	Verkoopnetwerk	GS Gestarte Sessies (per week)	GAAS Gemiddeld Aantal Active Streams	GA Gemiddelde Afspeelduur (min.)
1	NPO Radio 2	NPO	Ster	2.308.180	31.283	135
2	NPO Radio 1	NPO	Ster	2.026.306	17.021	84
3	Qmusic NL	DPG Media	DPG Media	1.595.607	20.137	127
4	538	Talpa Radio	Talpa Network	1.574.782	18.406	118
5	Radio 10	Talpa Radio	Talpa Network	1.515.852	19.918	132
6	Sky Radio	Talpa Radio	Talpa Network	1.015.810	13.786	136
7	NPO Radio 5	NPO	Ster	854.813	11.397	134
8	Joe NL	DPG Media	DPG Media	598.192	6.911	116
9	NPO FunX	NPO	Ster	373.296	1.954	53
10	NPO Klassiek	NPO	Ster	356.504	3.985	112
11	SLAM!	Mediahuis Radio	Talpa Network	337.548	2.807	84
12	100% NL	Mediahuis Radio	Talpa Network	337.134	4.429	132
13	NPO 3FM	NPO	Ster	309.508	3.632	118
14	Veronica	Mediahuis Radio	Talpa Network	282.406	3.745	133
15	Radio 10 60's & 70's hits	Talpa Radio	Talpa Network	282.257	3.758	134
16	BNR Nieuwsradio	BNR Nieuwsradio	FD Mediagroep	263.707	1.252	48
17	KINK	KINK	E Power Audio Sales	256.660	2.300	90
18	Arrow Classic Rock	Arrow Classic Rock	E Power Audio Sales	245.681	2.605	107
19	RADIONL	RADIONL B.V.	E Power Audio Sales	216.825	1.905	88
20	Sublime	Mediahuis Radio	Talpa Network	202.610	2.472	123
21	Qmusic Foute Uur	DPG Media	DPG Media	162.050	1.483	92
22	Qmusic Non-Stop	DPG Media	DPG Media	162.036	2.456	152
23	Classie.nl	Classie.nl	Talpa Network	161.583	1.997	125
24	NPO Sterren NL	NPO	Ster	150.262	1.710	115
25	Groot Nieuws Radio	Groot Nieuws Radio	E Power Audio Sales	138.389	834	61
26	Radio 10 Non-Stop	Talpa Radio	Talpa Network	134.839	2.413	180
27	Radio 10 80's hits	Talpa Radio	Talpa Network	130.740	1.635	126
28	538 NONSTOP	Talpa Radio	Talpa Network	116.539	1.718	148
29	NPO Radio 2 Soul & Jazz	NPO	Ster	114.869	1.531	134
30	Radio M Utrecht	RPO	ORN	109.729	1.193	110
31	Radio Gelderland	RPO	ORN	103.430	1.175	115
32	Omroep Brabant	RPO	ORN	96.967	1.217	127

# Wish list for 2024 and beyond



Head set listening on laptop/PC



Integration censusdata and panel data



Time shift listening (Listening On Same Day As Live)

## And last but certainly no least: NMO Crossmedia!

# Lessons learned

- Join forces where possible: for cross-media and efficiency purposes
- Allow plenty of time for a parallel run (at least 6 months)
- Be careful predicting/communicating differences in results, it creates expectations that cannot always be met
- Keep your 'enemies' close (and involved)
- Have an external, independent audit carried out

# Thanks for listening!

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