



# Audify Audio Annual Report

2022



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# Preface

*So happy you've opened this report! What you have in front of you are all the data from the 2022 audio year. Last year it has become crystal clear that demand for audio is increasing to be able to cope in today's society. More people are choosing to get their entertainment and information through audio. It just fits in better with how people organize their lives, screenlessly, hands and eyes free. Hearing is the fastest of the human senses and sound is incredibly emotive. In 2022, advertisers have taken full advantage of this in the various roles audio plays for with people.*

*Podcast listening is past the exploration stage and holds a significant share of the audio market. Linear radio is the dominant format thanks to its enormous reach, accessibility, the here and now, its ability to surprise and evoke positive emotions with the human voice and content that makers create. Radio connects us to the outside world and energizes us with all the audio elements that make radio so unique. As of 2023, the transition from NLO to the NMO Listening Survey shows the weekly dynamics of the radio market.*

*Audify is a sparring partner for advertisers and consultants. We provide knowledge and inspiration to help brands make better use of sound in commercial communications. To deal with the multifaceted values of audio as an advertiser, we have researched, developed and compiled the e-learning of the Audify Academy. It was launched in 2022 to provide the industry with an audio community in which we can make sense of the powers of audio together, now and in the (AI) future.*

*We'll take the facts & figures of 2022 into 2023 as knowledge while continuing to explore and share the drivers behind the ongoing growth in the audio landscape.*

*Hope to hear from you if you want to work with Audify to develop great cases.*

Liedewij Hentenaar  
Director Audify

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# The Highlights

## 2022 has broken records

With over 225 million Euro, net investments in radio advertising have never been higher than in 2022. The year 2022 saw 7.8% more sales than the year before and 33% more than 2020.

The second quarter saw the biggest increase relative to 2021, with 15.7% more investments. Q4 saw the highest investments with over 81 million Euro (+4.1% vs. 2021).

90% of net investments went to radio spots, 5.7% went to branded content and 4.3% were invested through digital radio. Investments in digital radio increased the most at 24.8%.

More than 5.7 million spots were aired, with average spot length of 15.5 seconds.

Retail is the largest industry on radio and T-Mobile, Kruidvat and KPN are the main advertisers.

Radio spots have achieved more than 324 billion audio impressions. In addition, we have streamed 1.6 billion hours of live audio and downloaded 285 million podcasts.

# Chapter 1

Key figures radio advertising



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# Key figures radio advertising

**Net investments increased by 8% to over 225 million Euro**

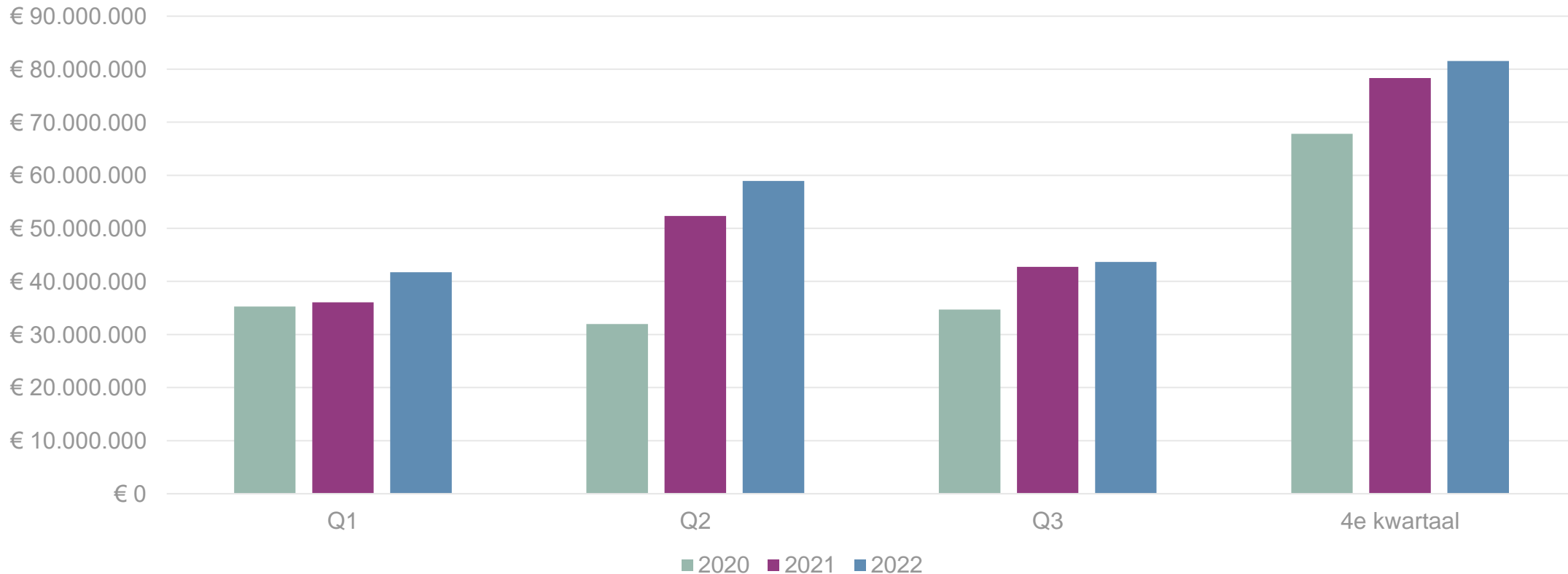
	2020	2021	2022	Index 2022-2021
Net investments	€169,750,000	€209,465,000	€225,821,000	108
Number of advertisers	1,709	1,810	1,971	109
Number of brands	1,890	2,009	2,226	111
Number of seconds aired	66,212,022	78,079,040	89,229,660	114
Number of spots aired	4,095,314	4,897,711	5,746,256	117
Average spot length	16.2	15.9	15.5	97
GfK Probe GRPs 10+ years (20")	1,564,518	1,729,610	1,831,420	106
GfK Probe GRPs 20-49 years (20")	1,588,914	1,756,197	1,849,875	105
GfK Probe GRPs 25-54 years (20")	1,729,481	1,908,653	2,027,436	106



# Investments in radio advertising per quarter

Increase in each quarter, in Q1 largest percentage increase and in Q2 largest absolute increase

Total net radio ad investments

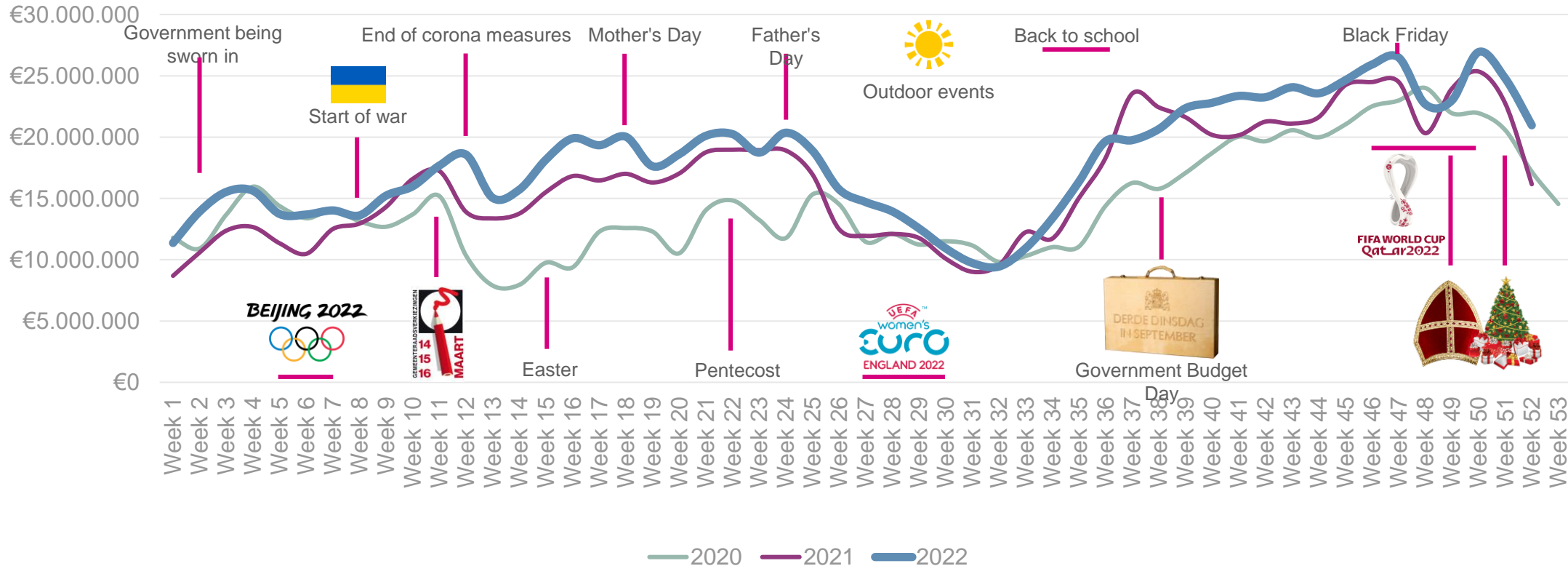




# Investments in radio advertising per week

Gross investments in 2022 in 45 weeks above 2021 level, weeks 46, 47 and 50 highest investments

Gross investments per week

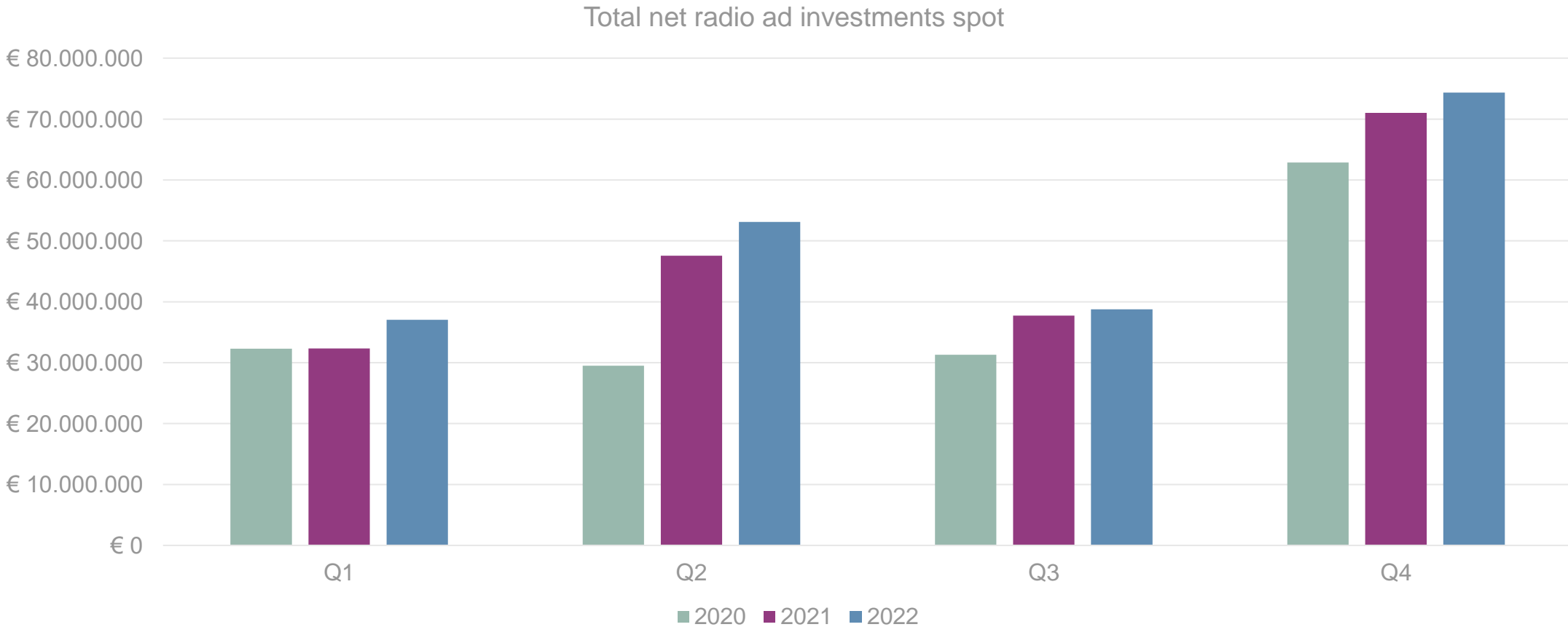






# Net radio advertising investments spot per quarter

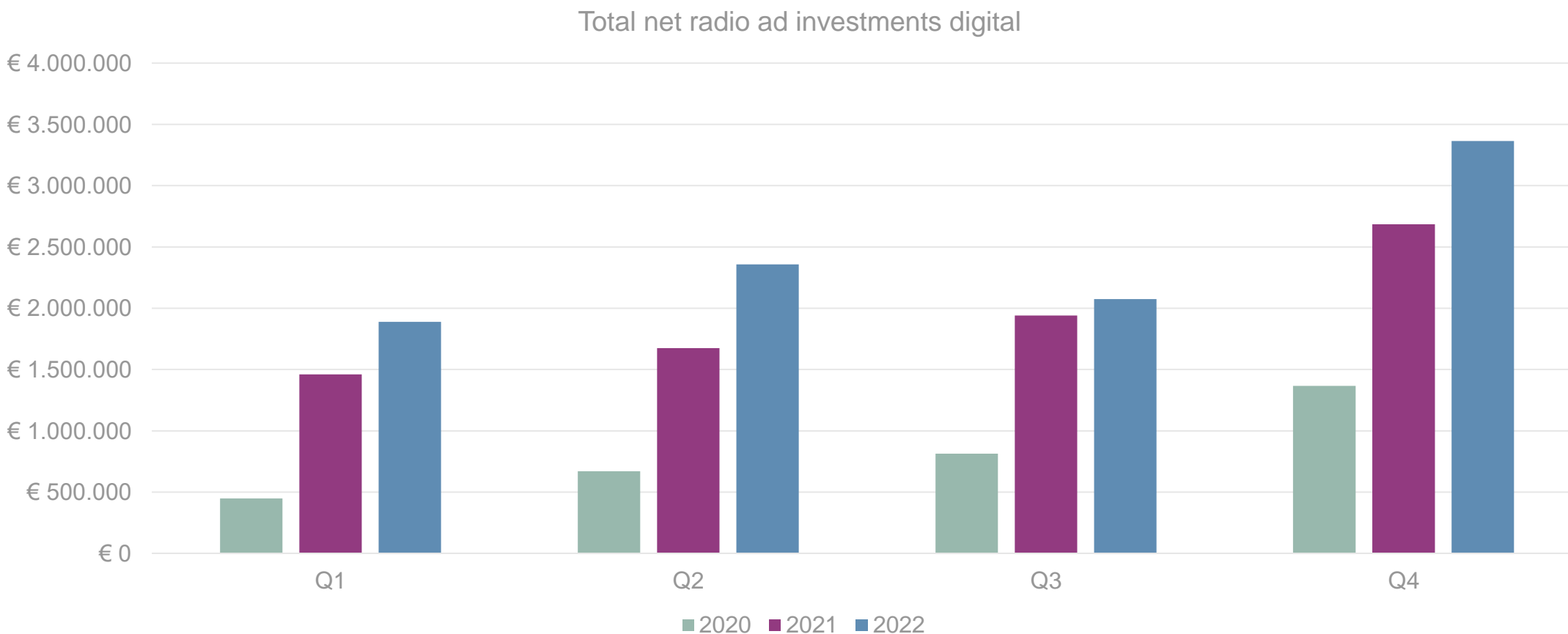
Radio spot 90% share within total audio market; net investments +7.8%





# Net radio advertising investments digital per quarter

Digital 4.3% share within total audio market; net investments +24.8%

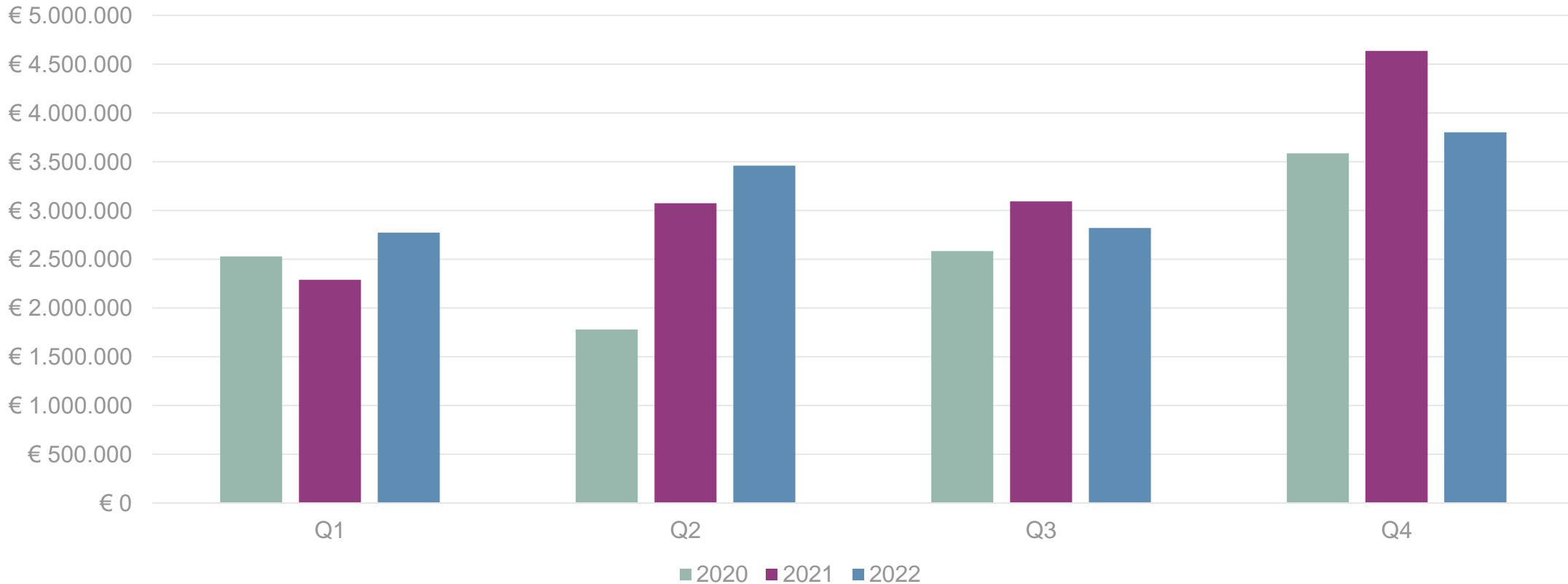




# Net radio advertising investments branded content per quarter

**Brand content 5.7% share within total audio market; net investments -1.8%**

Total net radio ad investments branded content





# Top 10 product groups on radio

10+ years: total 2,099,432 GRPs = 324,514,200,608 impressions

Product group	10+ GRPs	SOV%	#1	#2	#3
Retail	616,424	29.4%			
Media	197,774	9.4%			
Telecommunications	130,755	6.2%			
Insurance	104,371	5%			
Banks, Financing	102,555	4.9%			
Professional services	93,669	4.5%			
Passenger, commercial vehicles	85,279	4.1%	 	 	 
Nonprofit	82,981	4%			
Recreation	76,848	3.7%			
Games of chance	46,584	2.2%			



# Gross radio advertising investments by industry

Retail remains by far the largest industry and 'hospitality, tourism and recreation' rises by index 150

	2020	2021	2022	Index 2022-2021
Retail	€207,641,447	€236,246,342	€254,947,436	108
Financial Services	€81,917,594	€105,843,280	€123,531,326	117
Government, Education and Non Profit	€75,794,257	€85,940,794	€84,860,133	99
Hospitality, Tourism, Recreation	€31,406,754	€48,138,746	€72,218,963	150
Telecom, ICT	€70,613,259	€62,402,386	€68,076,270	109
Transport	€85,347,508	€76,178,616	€65,100,968	85
Media	€46,026,480	€48,411,939	€53,298,046	110
Professional services	€24,693,625	€34,702,887	€50,544,571	146
Other Products and Services	€20,007,273	€20,089,378	€29,557,610	147
Food and Stimulants	€13,572,550	€22,353,885	€29,151,946	130
Fuel, Energy, (Petro)Chemicals	€17,083,621	€14,805,119	€16,234,409	110
Home and Garden	€10,925,703	€13,015,800	€11,663,027	90
Construction and Real Estate	€6,223,981	€9,516,780	€8,808,459	93
Products Professional Use	€5,829,972	€6,966,916	€7,566,392	109
Medical	€3,805,606	€8,126,997	€4,245,919	52
Consumer Electronics	€5,128,661	€5,159,195	€4,212,632	82
Agricultural	€649,963	€696,486	€3,063,122	440
Personal Care	€4,445,941	€4,589,586	€2,979,441	65
Fashion	€1,484,518	€2,667,991	€1,977,261	74
Laundry and Cleaning Agents	€437,028	€1,938,538	€330,360	17
Other	€0	€0	€10,920	
<b>Total</b>	<b>€713,035,743</b>	<b>€807,791,663</b>	<b>€892,379,209</b>	<b>110</b>



# Top 25 Radio Advertising Brands

**T-Mobile biggest brand on radio, Gamma with index 245 biggest percentage riser in top 25**

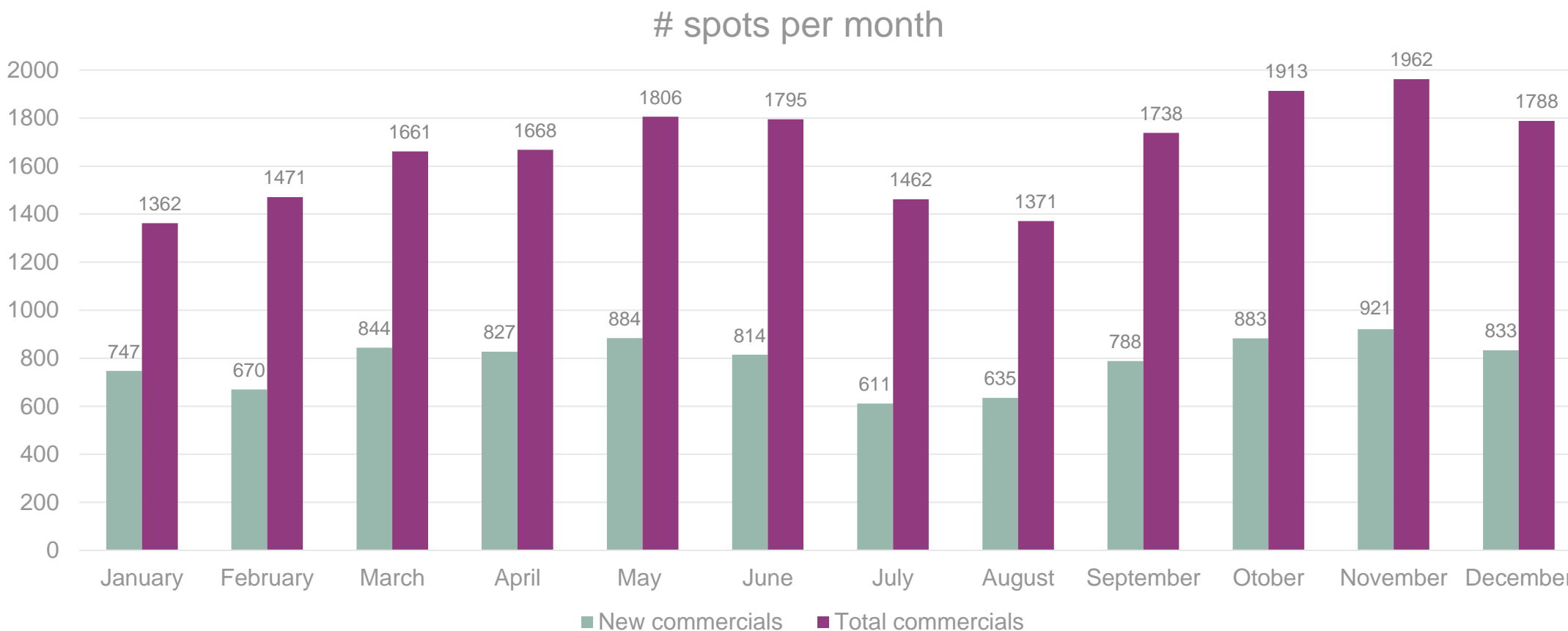
	2020	2021	2022	Index 2022-2021
T-Mobile	€16,095,558	€15,094,730	€15,965,469	106
Kruidvat	€12,814,864	€13,200,684	€13,977,470	106
KPN	€19,437,762	€14,841,262	€13,583,668	92
Ministry of Health, Welfare and Sport	€15,084,291	€19,383,504	€13,358,395	69
ANWB	€14,664,415	€16,365,046	€13,216,781	81
Albert Heijn	€8,555,316	€8,692,434	€11,849,949	136
Jumbo	€10,595,180	€12,906,075	€11,281,744	87
Lidl	€11,742,903	€11,547,627	€9,923,273	86
McDonald's	€5,699,240	€9,717,734	€9,901,505	102
Bol.com	€10,112,558	€9,151,549	€9,728,249	106
Ziggo	€6,600,156	€5,170,630	€8,430,069	163
Promovendum	€7,373,801	€8,933,634	€8,022,208	90
Hornbach	€5,545,339	€5,247,854	€7,116,146	136
Rabobank	€2,408,059	€5,474,541	€6,921,769	126
NS	€523,233	€4,408,363	€6,668,671	151
Staatsloterij	€6,489,923	€5,422,874	€6,440,979	119
Renault	€13,351,392	€10,202,055	€6,422,965	63
Toyota	€6,807,153	€5,116,203	€6,341,384	124
Karwei	€1,888,455	€4,215,804	€6,209,973	147
Coolblue.nl	€4,029,092	€5,516,602	€6,021,373	109
Ministry of Health, Welfare and Sport	€1,374,852	€2,996,416	€5,968,031	199
Dirk	€2,889,217	€3,110,147	€5,811,289	187
ING Bank	€1,964,705	€5,872,517	€5,706,886	97
ABN AMRO	€4,599,210	€6,095,423	€5,705,739	94
Gamma	€2,286,794	€2,315,875	€5,679,671	245
Total Top 25	€ 192,933,468	€ 210,999,583	€ 220,253,656	104

Source: Nielsen (data possibly subject to slight changes due to dynamic database)



# Number of commercials per month

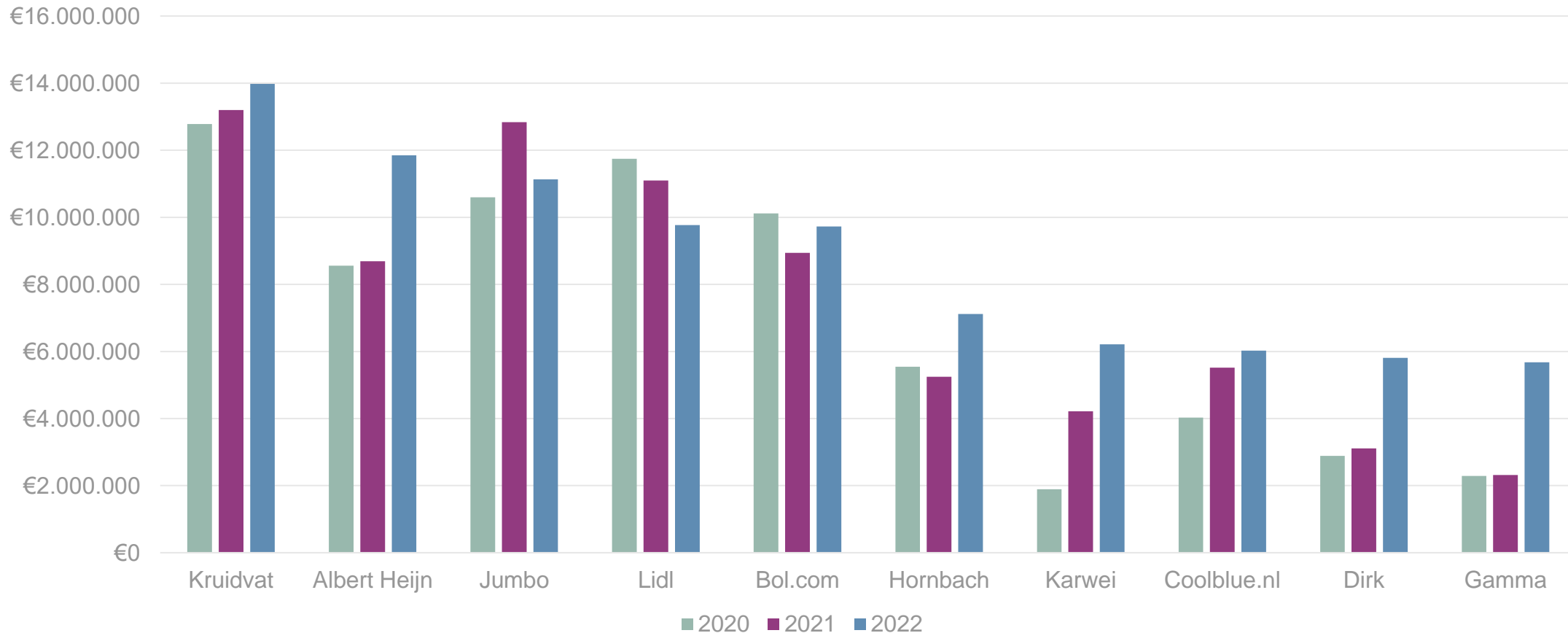
47.3% of all commercials are new, most new and highest number of commercials in November





# Industry insights: Top 10 retail brands

## Kruidvat is #1 retail brand, Media Markt biggest riser in Top 10

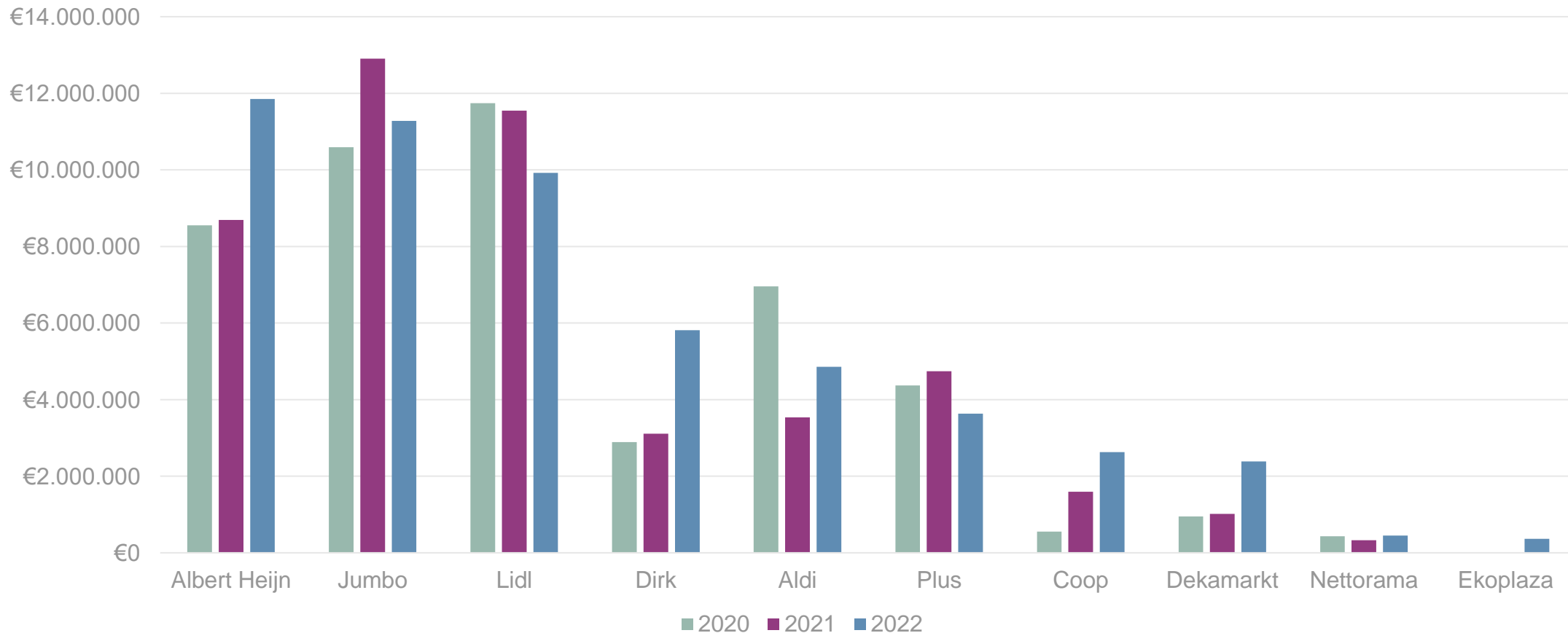






# Industry insights: Top 10 supermarkets

## Albert Heijn is the new #1, Dirk quit TV and invested more in radio



# Top 20 new brands on radio in 2022



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**besured** beter verzekerd



A man with a beard and short hair is driving a car, smiling and looking towards the right. He is wearing a light-colored button-down shirt with sunglasses tucked into the collar. The car's interior, including the steering wheel and dashboard, is visible. The entire image has a semi-transparent pink overlay.

**Chapter 2**  
Radio listeners

A white audio waveform icon consisting of several vertical bars of varying heights, resembling a sound wave.

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# Average daily and monthly reach

Every week, radio reaches more than 12.5 million unique Dutch people aged 10+ years old

Average unique daily reach & reach per measuring period

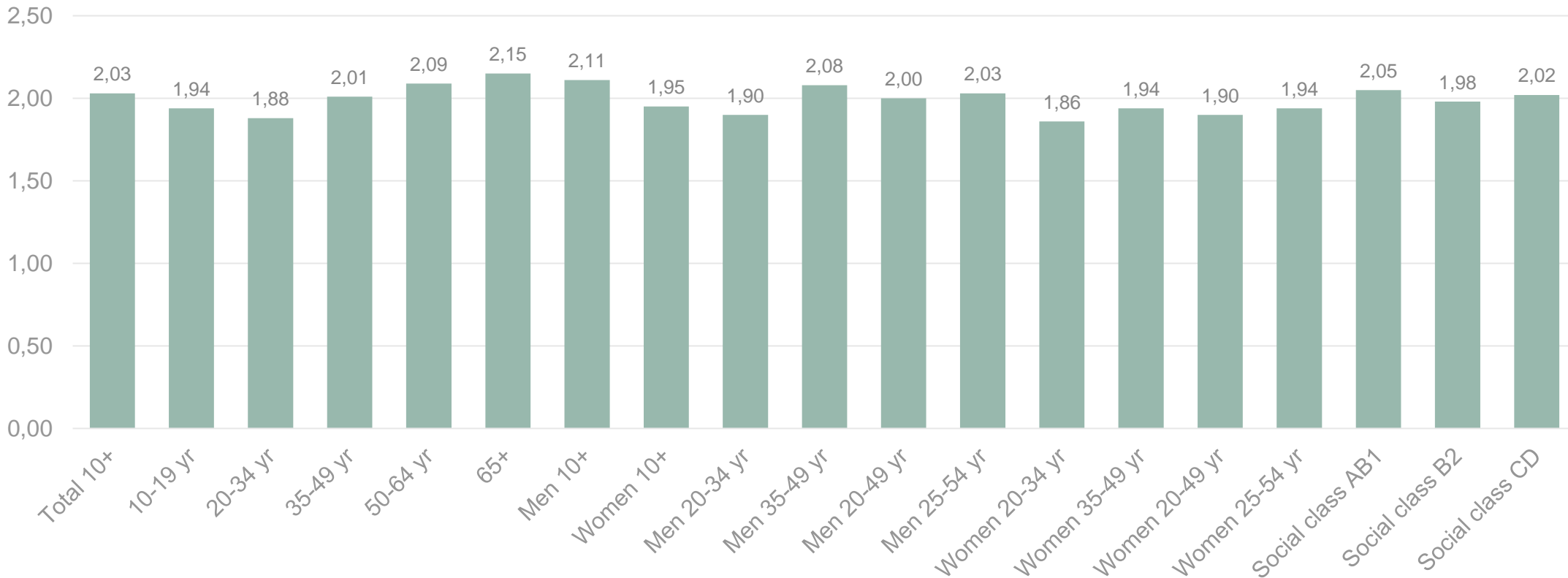




# Average number of radio stations listened to

On average, a radio listener listens to 2.03 radio stations, with slight differences by target group.

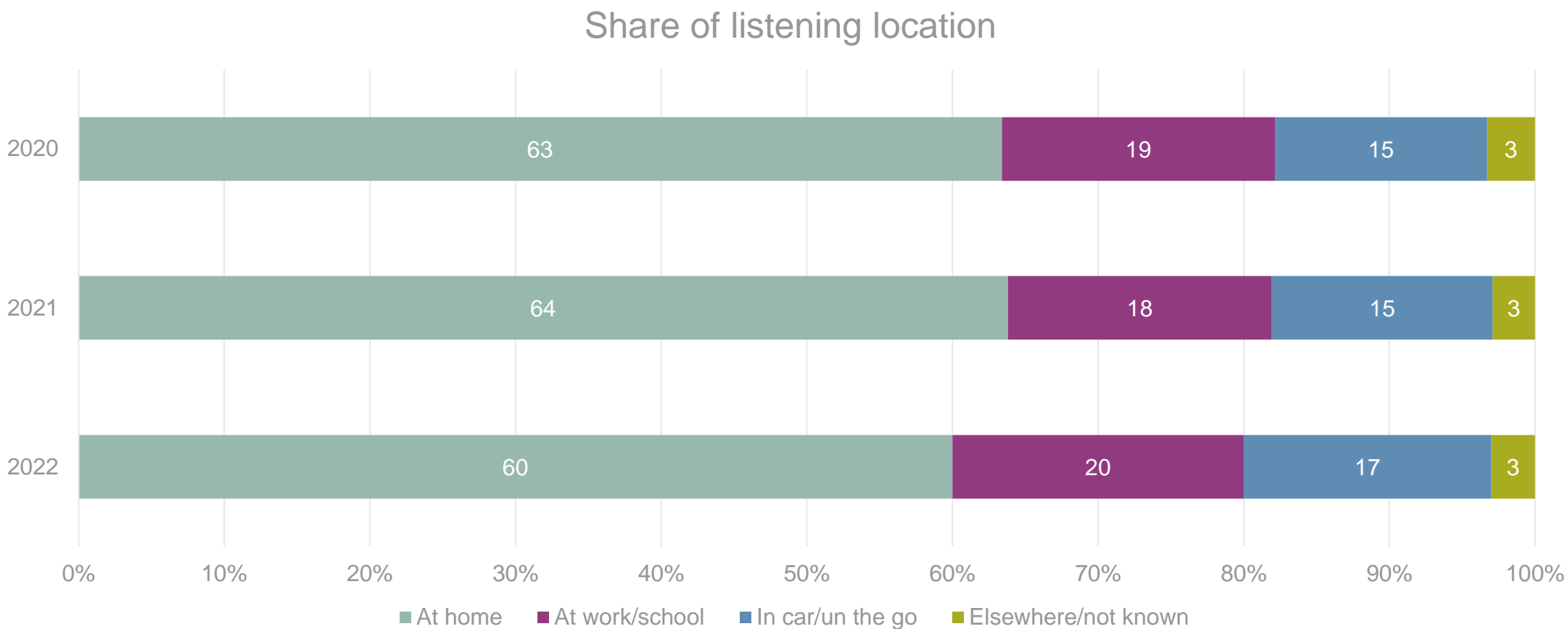
Average # of radio stations listened to





# Share of listening location

Outdoors shows slight increase but still a lot at home, pre-corona share at home was 54%

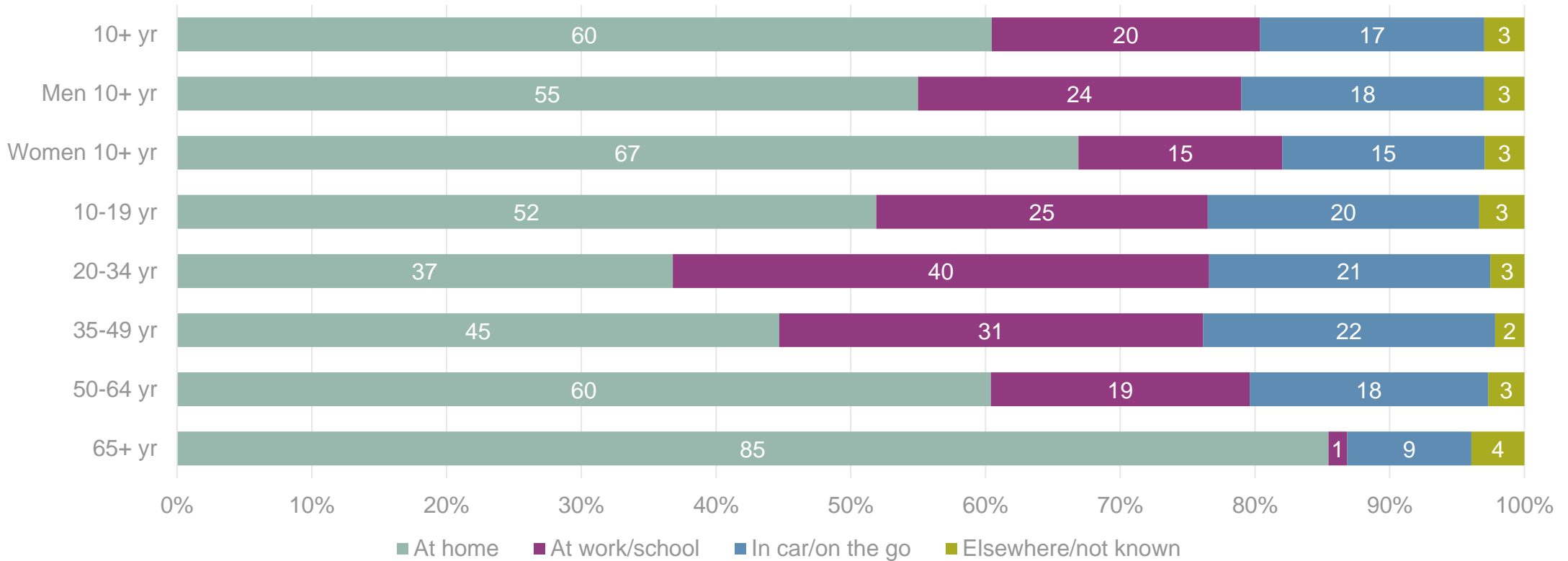




# Share of listening location by age group

Target group 20-34 years largest share at work/school and 35-49 years in car/on the go

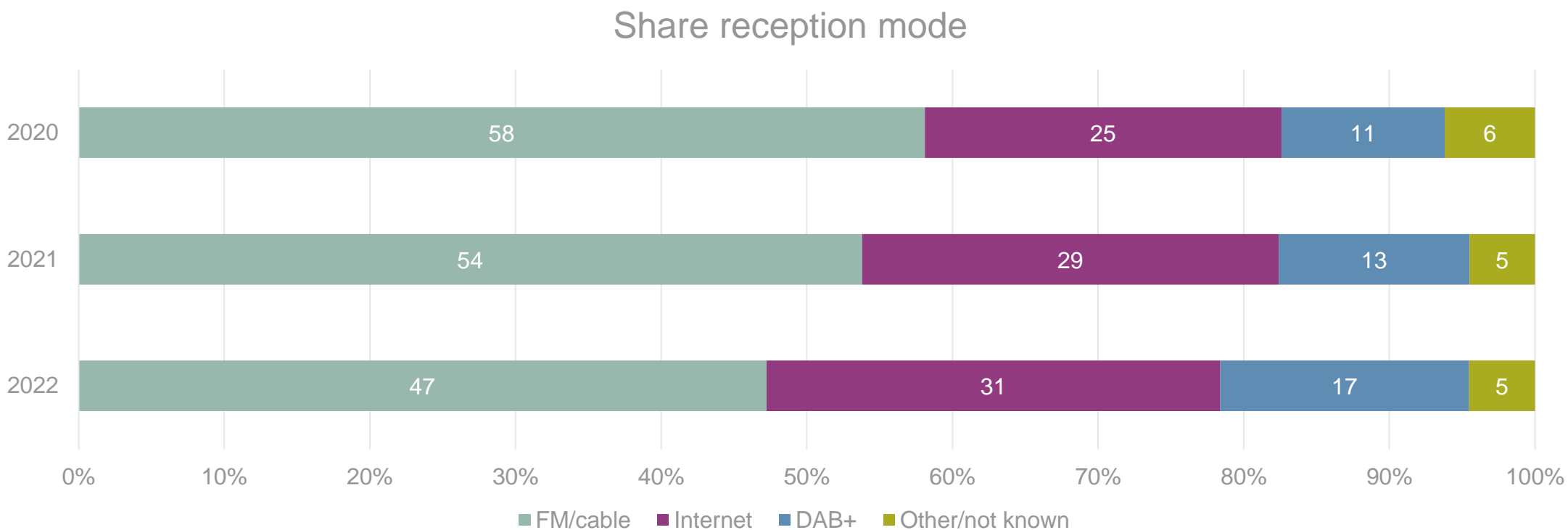
Share of listening location by age group





# Listening time by reception mode

## Radio listening digitizes, FM/cable less than 50%



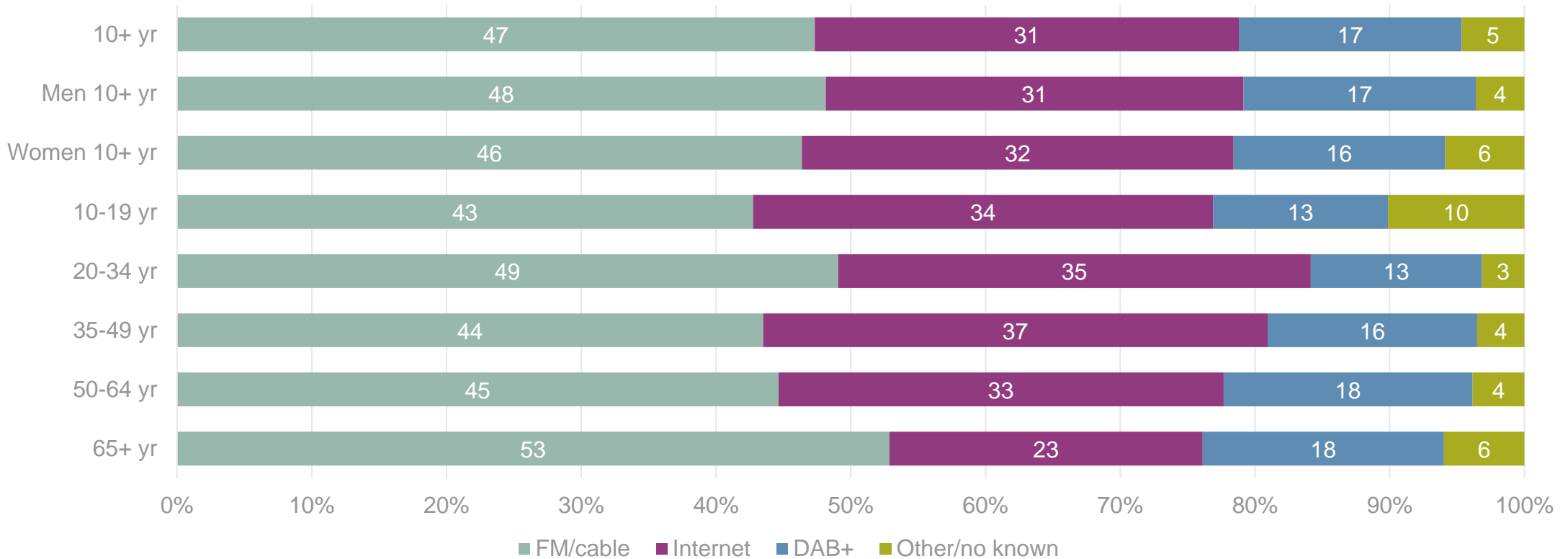




# Listening time per reception mode by age group

35-49 yr-olds largest share of internet listening, share of DAB+ most popular among 50+ yr-olds

Share reception mode by age group





# Chapter 3

Audio Landscape



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# Top 10 most played artists and songs on radio in 2022



1. Ed Sheeran



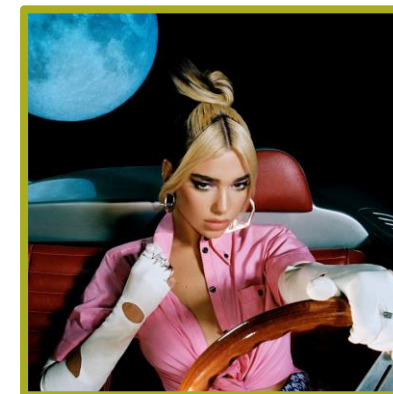
2. David Guetta



3. Coldplay



4. The Weeknd



5. Dua Lipa



6. George Ezra



7. Suzan & Freek



8. Rondé



9. Ava Max



10. Bløf



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# Top 10 most played tracks on radio in 2022



1. Purple Disco Machine & Sophie + The Giants - In The Dark



2. Ed Sheeran – Overpass Graffiti



3. Di-Rect - Through The Looking Glass



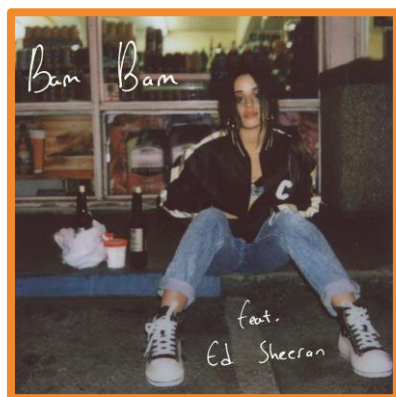
4. Son Mieux – Multicolor



5. George Ezra – Anyone For You



6. Harry Styles – As It Was



7. Camila Cabello feat. Ed Sheeran - Bam Bam



8. Willy William – Trompeta



9. Rondé – Love Myself



10. Robin Schulz & Dennis Lloyd - Young Right Now



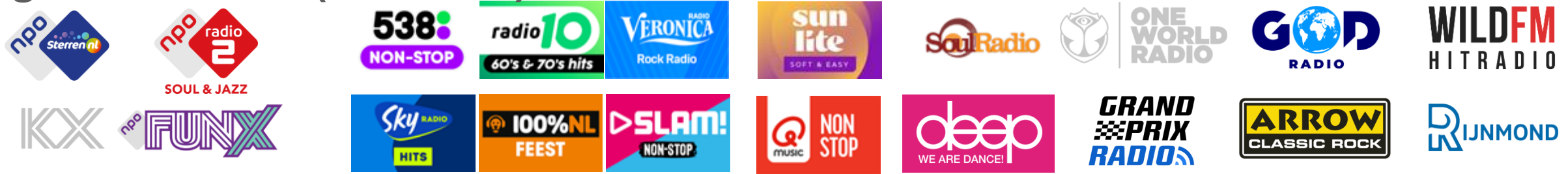
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# Audio Landscape

## NLO stations



## Digital channels (selection)



## Podcasts (selection)

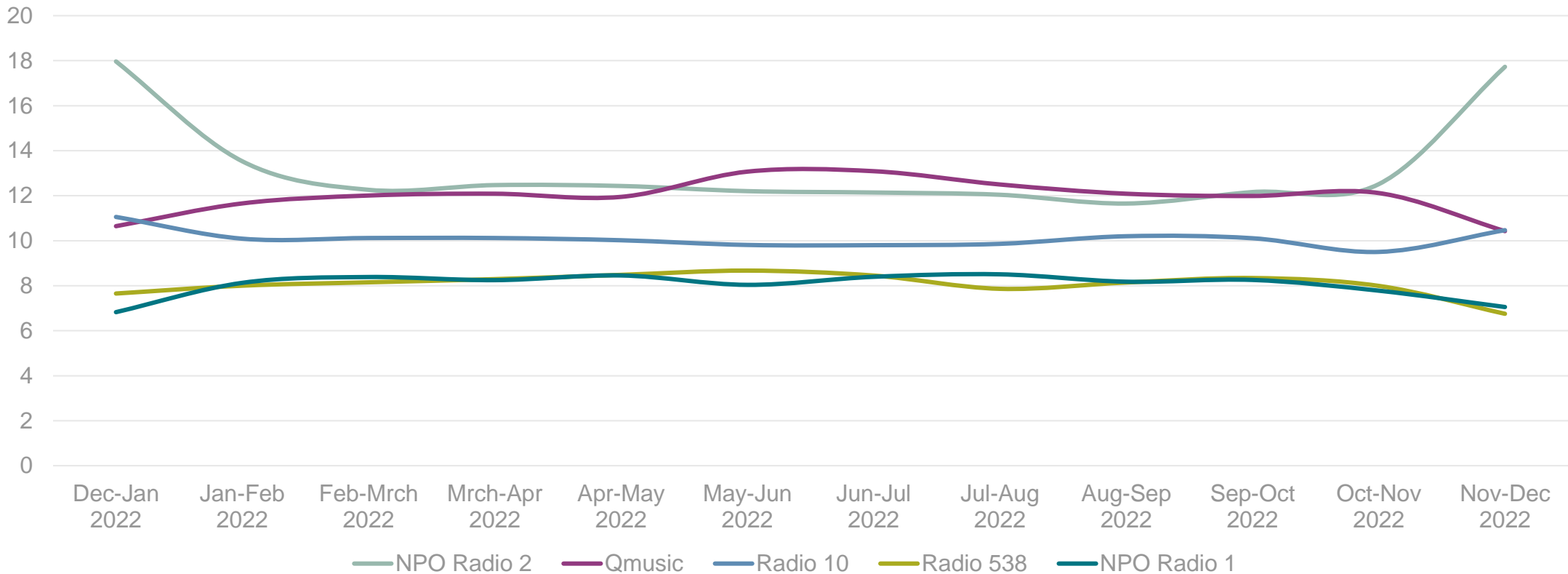




# Market shares 2022 - Top 5 radio stations

NPO Radio 2 Top 2000 peak in Nov-Dec, Qmusic market leader in May-Sept 2022

Market share 10+ yr

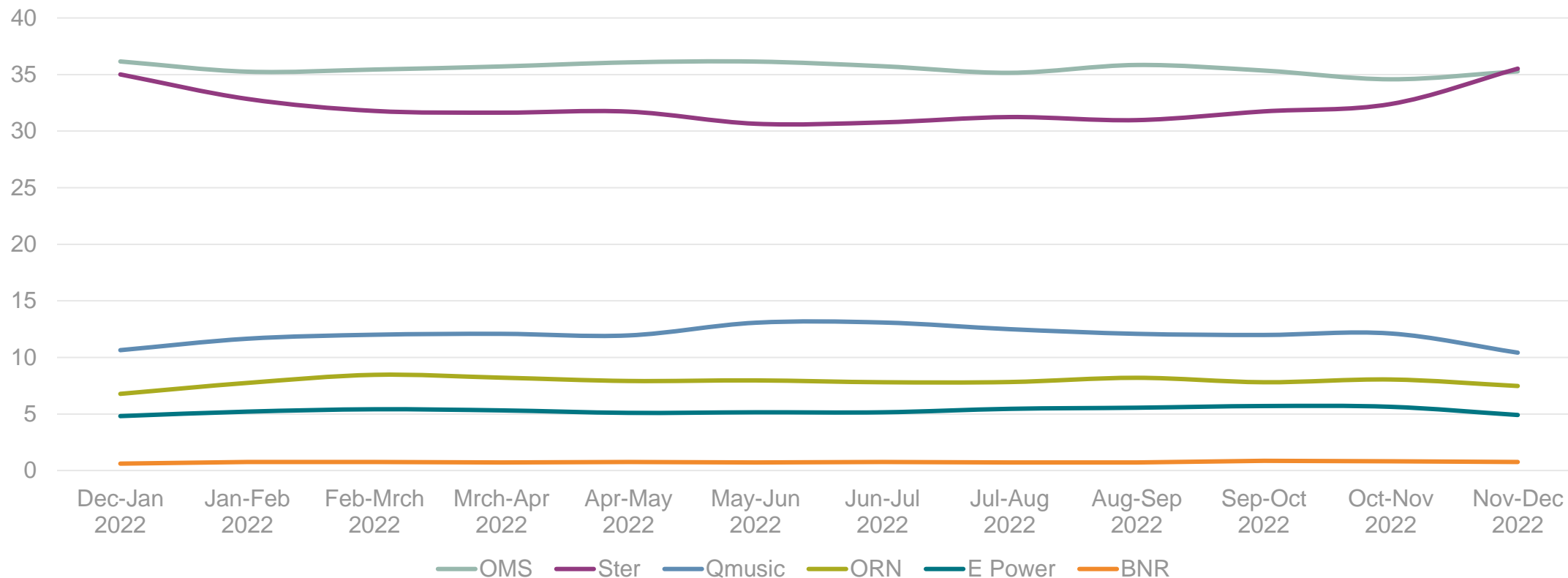




# Market shares 2022 - station groups

**OMS market leader with eight stations, Ster with five stations ranks second**

Market share 10+ yr



# Annual review of events 2022 - January through June



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January


February


March


April


May

June


 **Scheduling:** 538 Morning with Wietze and Klaas


 **Promotion:** 1 year free cost of living


 **Scheduling:** 'FryslânDoc' Podcast on Long Covid


 **Collaboration:** RPO take part in the NLO Streaming Audio Standard


 **Award:** Mattie and Marieke Golden Radio Ring 2022 and Bram Krikke Silver Radio Star Man


 **Award:** Annemieke Schollaardt Silver Radio Star woman and Andres Odijk Marconi Award New Talent

 **Scheduling:** 100% Liefde with Robert ten Brink


 **Award:** Sublime Awards 2022

 **Design:** New design with Jan Smit and Erik de Zwart

 **Promotion:** Stories on helping Ukraine in 'Spitstijd in Bed'

 **Charts:** 80s & Top 810


 **Scheduling:** Regional broadcasters report on City Council elections


 **Chart:** Film score top 50


 **Scheduling:** Start Johnny's Friday with John Williams


 **Promotion:** 'Het wachtwoord'


 **Event:** 538 King's Day


 **Programming:** 1 day the Christmas station during the snow


 **Award:** Gouden Regiohelden Award for podcast 'De dood van Robbert'


 **Scheduling:** 'Vier het voorjaar'

 **Promotion:** Win an F1 world trip

 **Event:** Somertijd CPR Day

 **Scheduling:** Biem Buijs new presenter of Lunchpauze

 **Event:** Pentecost conference Stichting Opwekking

 **Scheduling:** 'Steef & Stoof' with ode to Brabant



# Annual review of events 2022 - July through December



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July

August

September

October

November

December



**Action:** 100% NL gastenlijst



**Chart:** Album Top 1000



**Design:** New design with voice Bart van Gogh



**Scheduling:** Eric Corton on KINK every weekday



**Change:** Expansion of FM and DAB+



**Scheduling:** Concert of Normaal to be heard on radio



**New station:** Radio West Sports



**Achievement:** Publisher most commercial podcast downloads in the Netherlands



**New station:** Nostalgia by Audiohuis



**Promotion:** De Uithaal



**Scheduling:** New show 'Karstival'



**Promotion:** The Sound



**Scheduling:** Marc Adriani new editor-in-chief of BNR



**Chart:** KINK 1500



**New station:** Vibe Radio by Epower



**Scheduling:** e.g. afternoon show Sander Lantinga and arrival of Sander Hoogendoorn



**Chart:** Rock 500



**Event:** Tent party in Borger



**Event:** Musical journey with Veronica Express



**Scheduling:** Podcast "30 jaar regionale televisie"

**Management:** Mandy van der Wal Managing Director



**Chart:** Top 1000 Allertijden



**Achievement:** Boekestijn & de Wijk 1 downloads podcast AND Podcast Award in News and Politics



**Promotion:** Sintvooriereen1



**Event:** Film Scores Week



**Chart:** Sublime Top 1000



**Scheduling:** Housuh in de Pauzuh XL



**Promotion:** Q-escape room



**Chart:** RADIONL top 30



**Chart:** Top 4000



**Event:** The Christmas Station



**Promotion:** Missie 538



**Scheduling:** Youngest morning DJ in the Netherlands  
**Promotion:** Glazen Huis 2022



**Chart:** Classic Top 250



**Chart:** Top 2000



# Chapter 4

NLO Streaming Audio Standard



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# The NLO Streaming Audio Standard

## Online listening to live or linear audio

The NLO Streaming Audio Standard consists of the consumption of live or linear audio listened to online (via the Internet) by listeners in the Netherlands. To capture this, NLO is partnering with Triton Digital, which provides the industry standard for validated online audio data through its streaming measurement service. The results are published in the form of monthly top lists that reflect the average per week and that can be found on [onlineaudiodata.nl](https://onlineaudiodata.nl).

All forms of audio on demand fall outside this definition. That's what the NLO Podcast Standard was developed for.

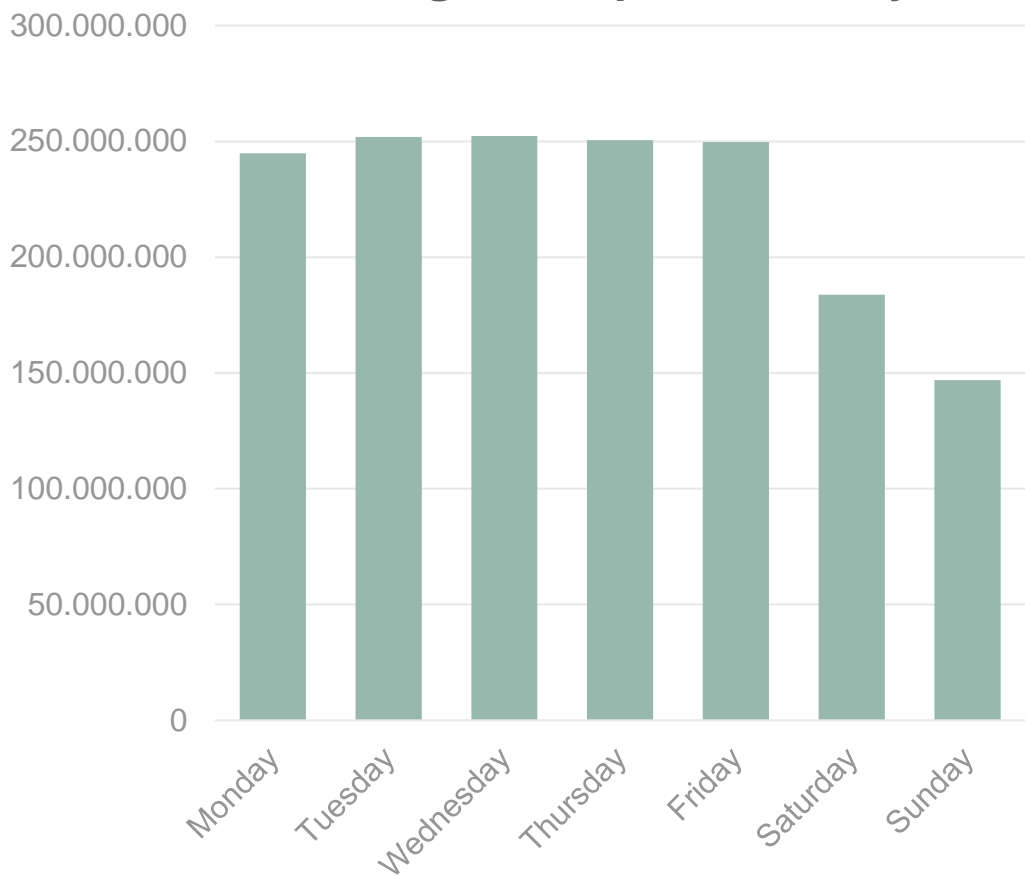




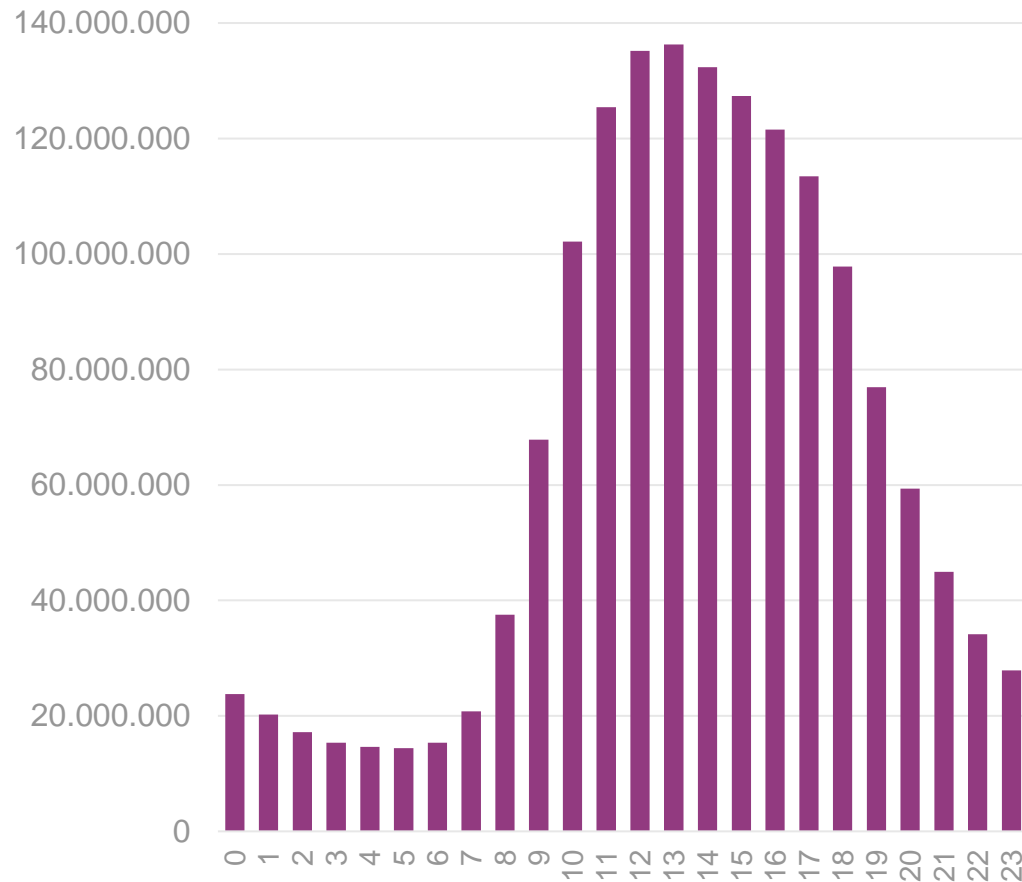
# 1.6 billion hours of streaming in 2022

On average, the most hours are streamed on Wednesdays and between 1 and 2 pm

### Total listening hours per week day



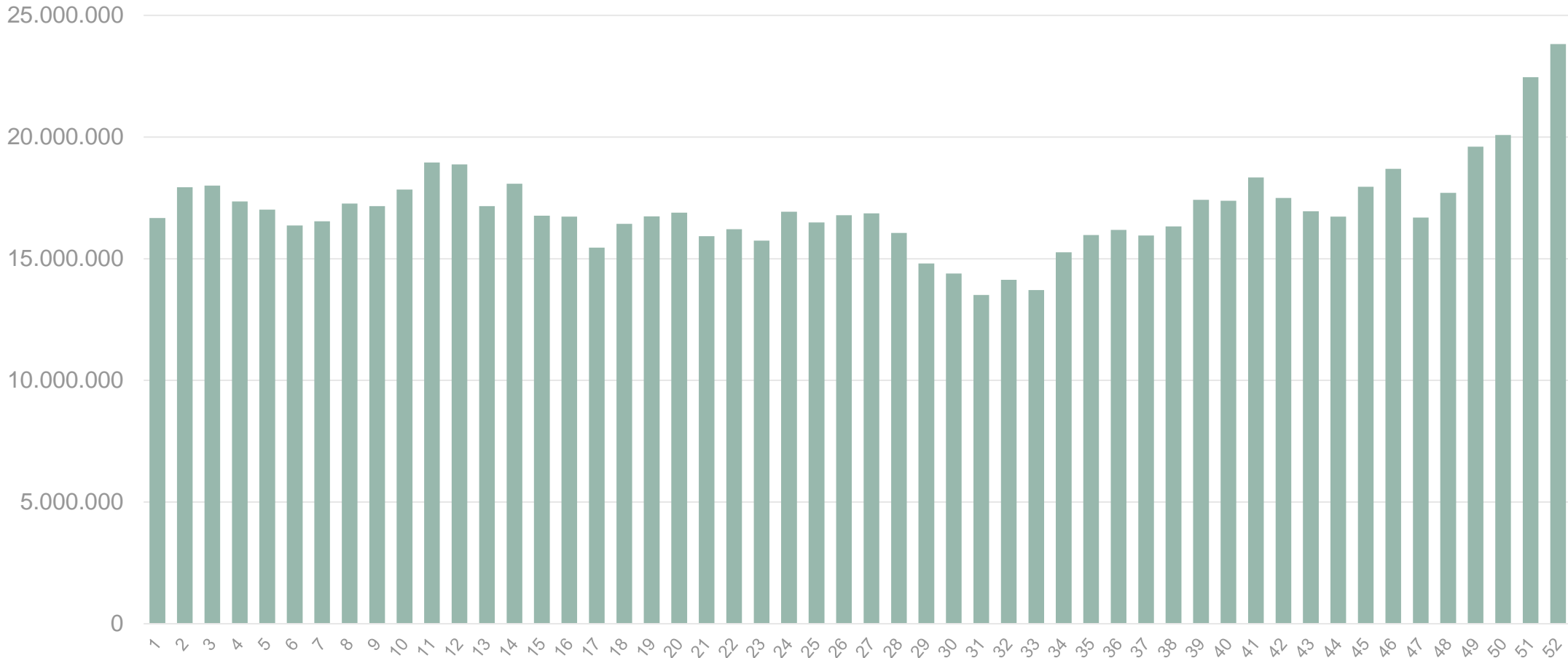
### Total listening time in hours, by hour of the day





# On average more than 17 million stream starts per week

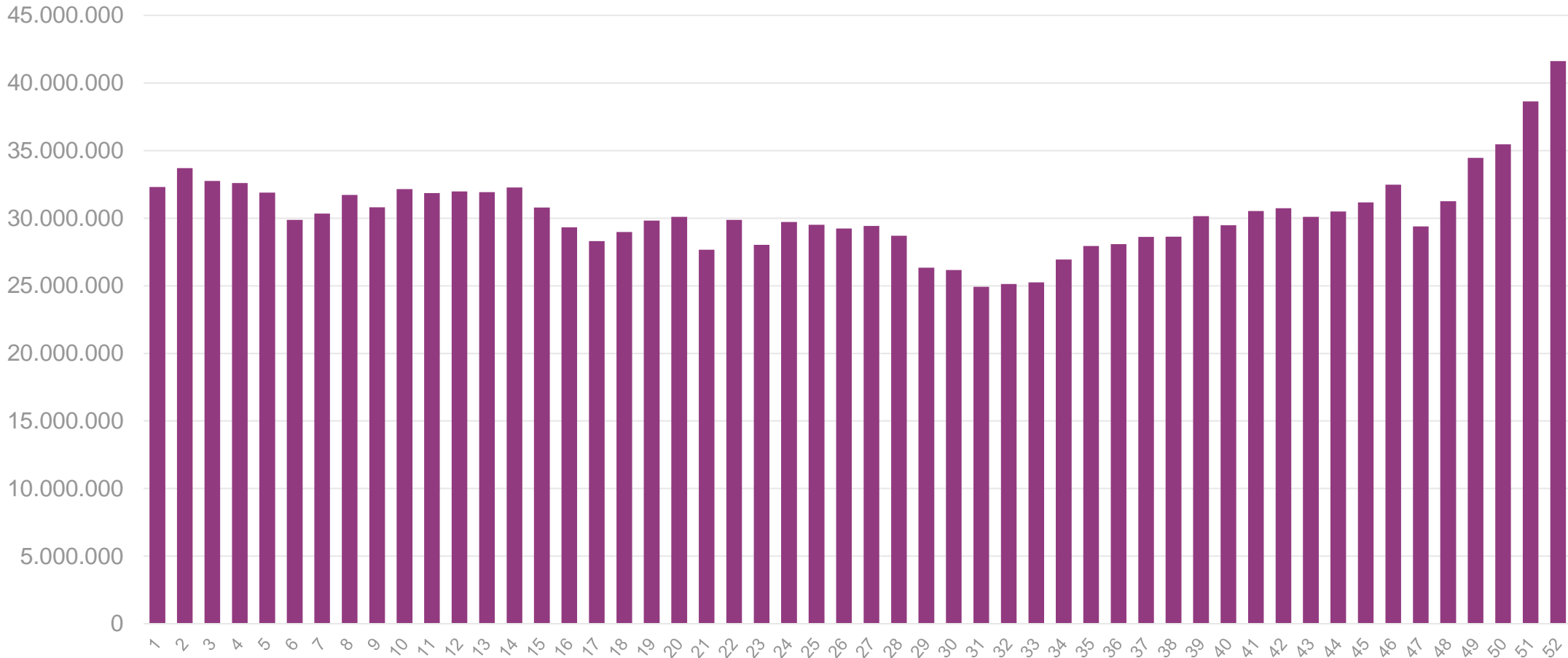
Most stream starts in weeks 50 through 52 (12 Dec 2022 to 1 Jan 2023)





# On average more than 30 million streaming hours per week

Most streaming hours in weeks 50 through 52 (12 Dec 2022 to 1 Jan 2023)

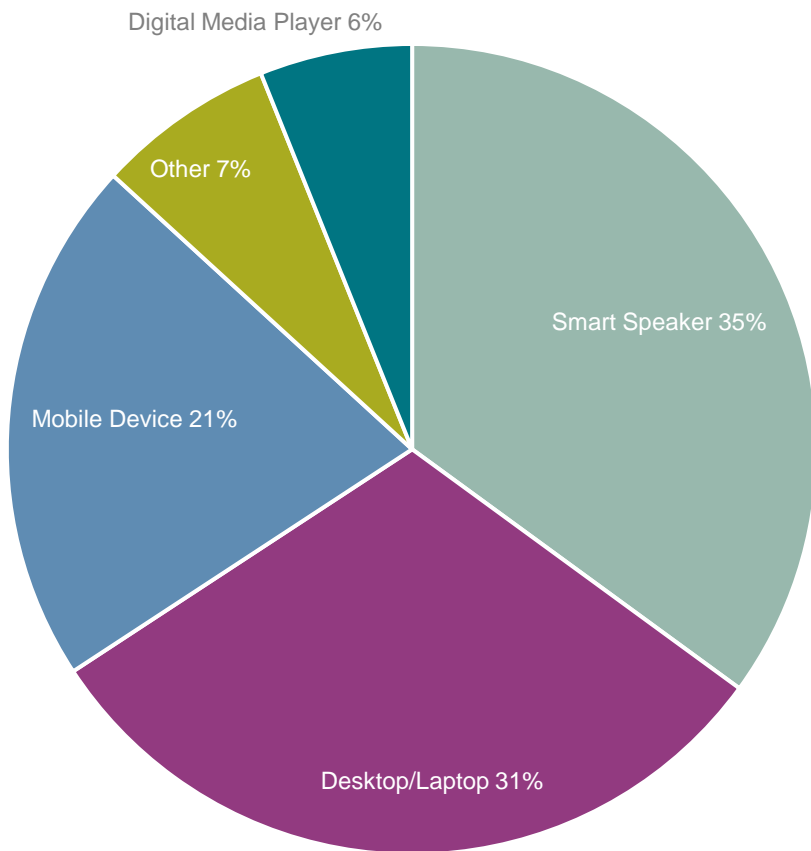




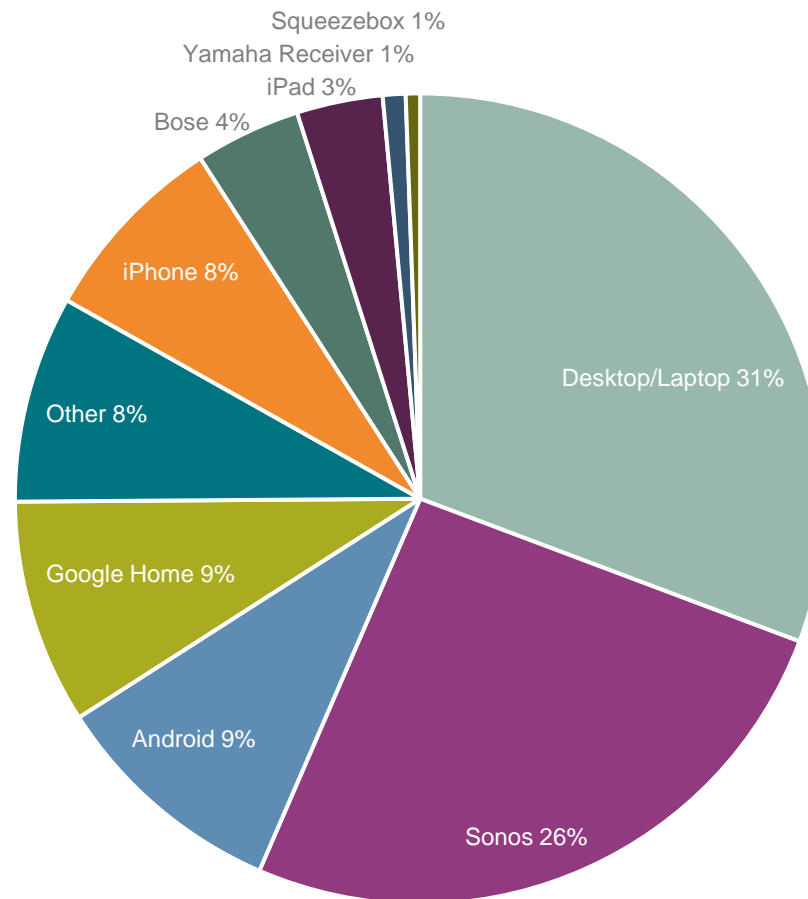
# Smart speaker most popular device, Sonos most popular brand

desktop/laptop is also widely used for streaming audio

**Device**



**Platform**





# Participants in the NLO Streaming Audio Standard

Meanwhile, over 119 stations for 22 media companies are being measured across 6 sales networks





A man with a beard and short hair is driving a car, smiling and looking towards the right. He is wearing a light-colored, long-sleeved button-down shirt. The car's interior, including the steering wheel and dashboard, is visible. The entire image is overlaid with a semi-transparent pink color. In the bottom right corner, there is a white graphic of a soundwave.

## Chapter 5

NLO Podcast Standard

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# The NLO Podcast Standard

## Online downloading or streaming of podcasts or other audio on demand

The NLO Podcast Standard consists of the consumption of podcasts or other audio on demand downloaded or streamed online in the Netherlands. To capture this, NLO is partnering with Triton Digital, which provides the industry standard for validated online audio data through its Podcast Metrics. The results are published in the form of monthly top lists that reflect the average per week and that can be found on [onlineaudiodata.nl](https://onlineaudiodata.nl).

All forms of live or linear radio are outside this standard, which is what the NLO Streaming Audio Standard was developed for. This standard is accessible to the entire market, including parties that are not yet members of NLO.

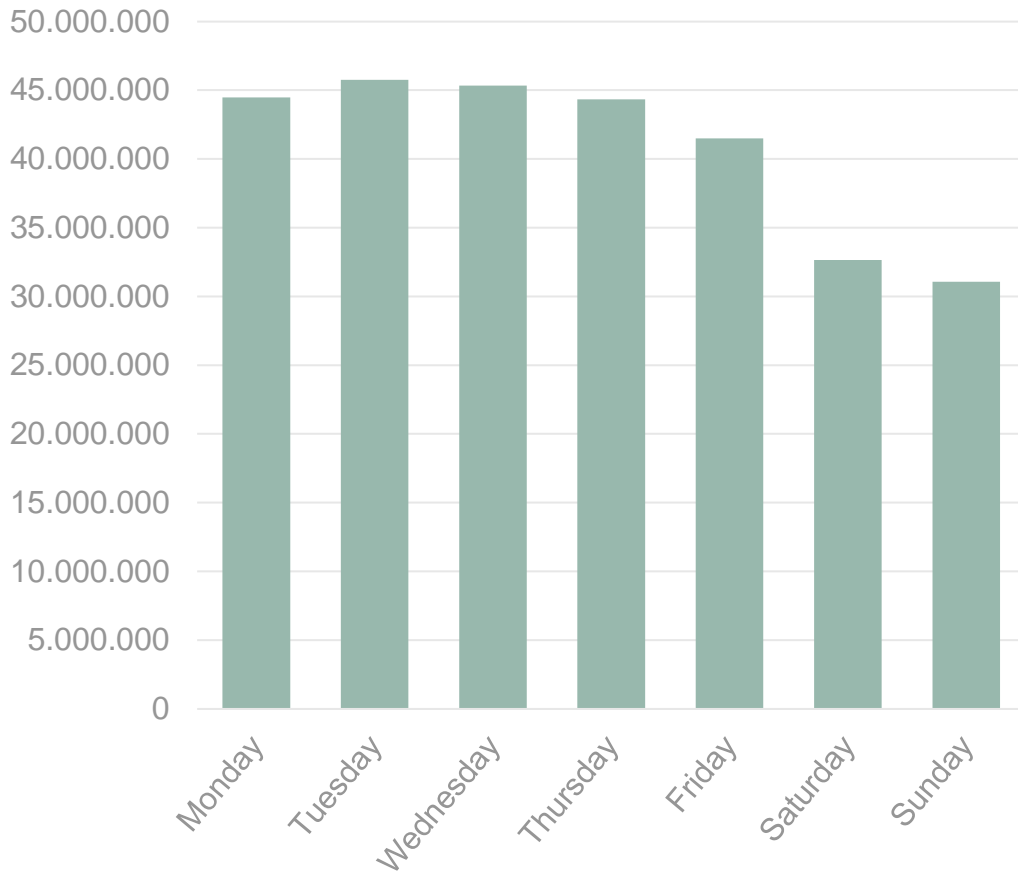




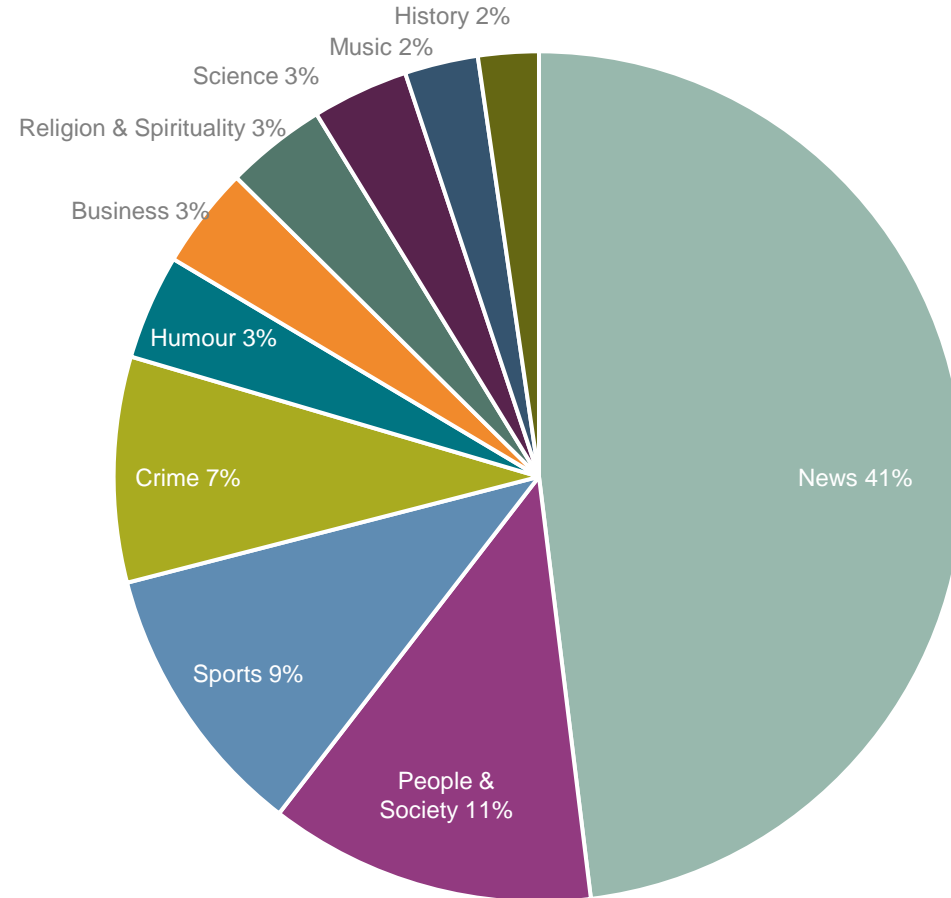
# 285 million podcast downloads in 2022

The most downloads on Tuesdays, news being the most popular category

### Total downloads per weekday



### Category top 10

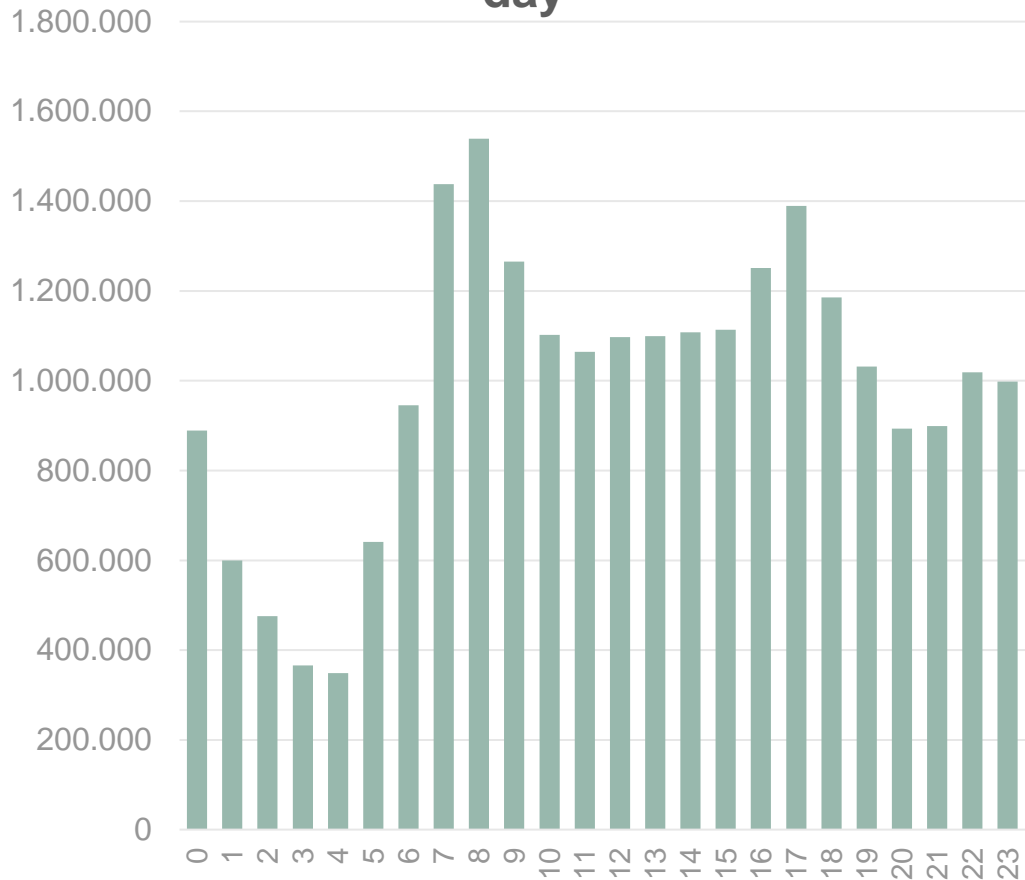




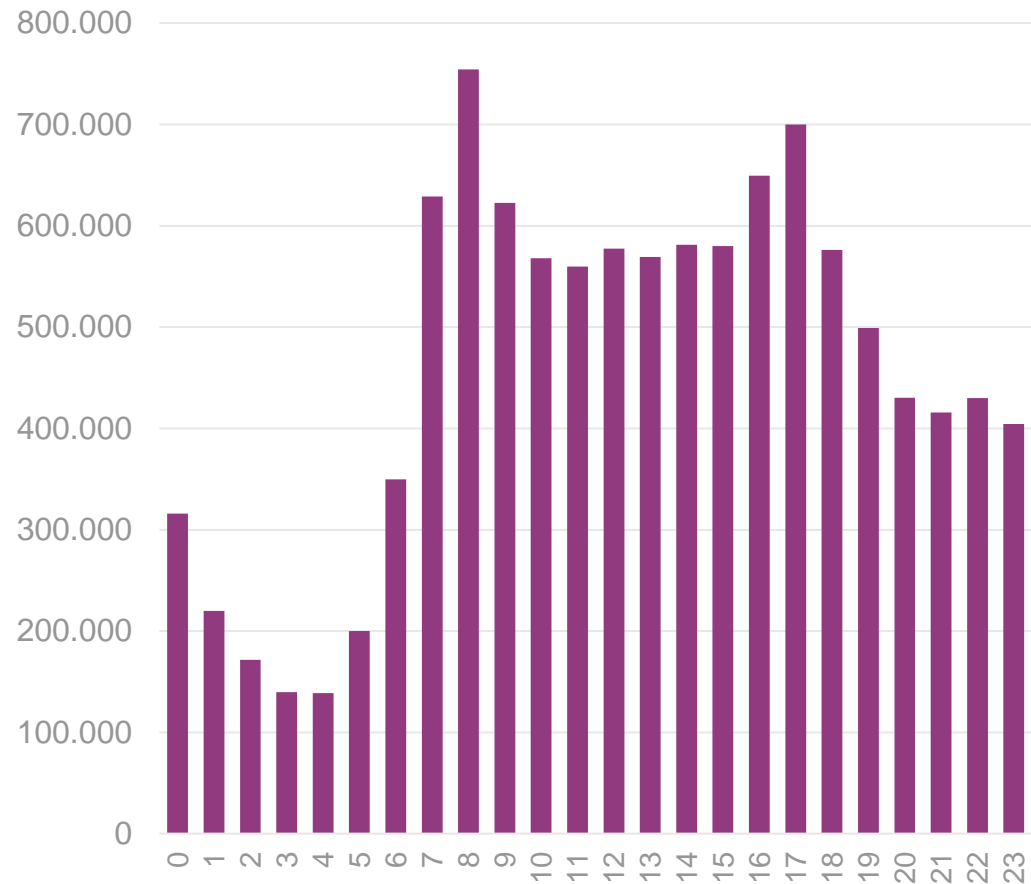
# Most downloads and users in rush hour periods

Between 8 and 9 a.m. most downloads and users, on average

### Average number of downloads per hour of the day



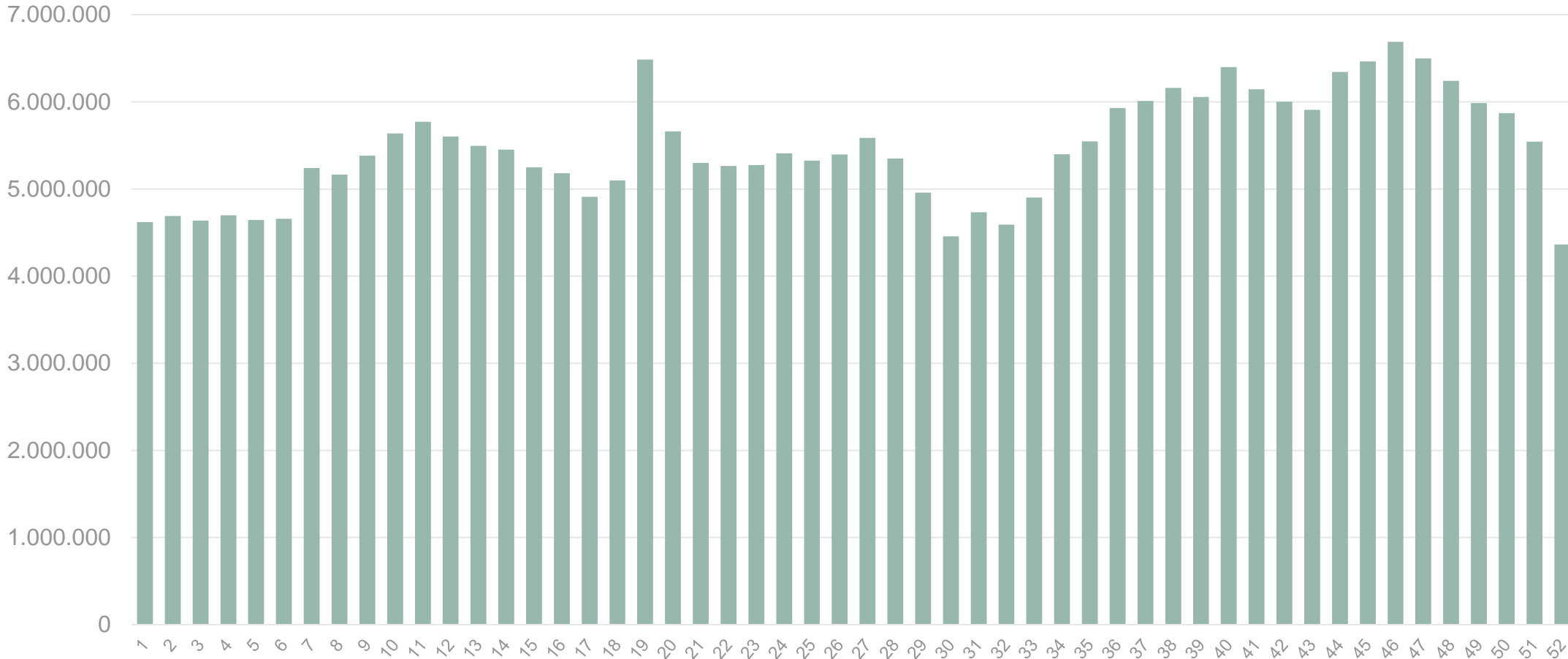
### Average number of users per hour of the day





# Average of 5.5 million podcast downloads per week in 2022

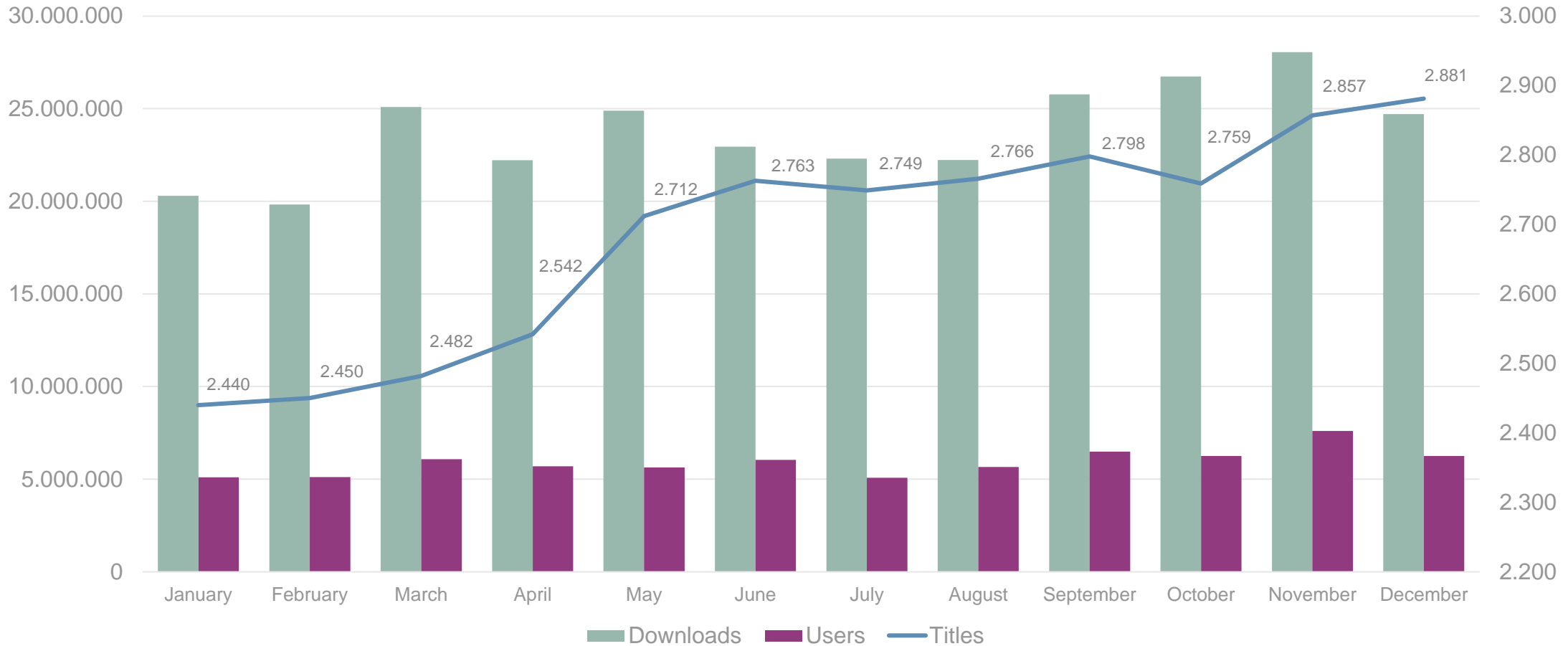
Most downloads in week 19 (9 to 15 May), 46 and 47 (14 to 27 Nov)





# From 2,440 to 2,881 measured podcasts by 2022

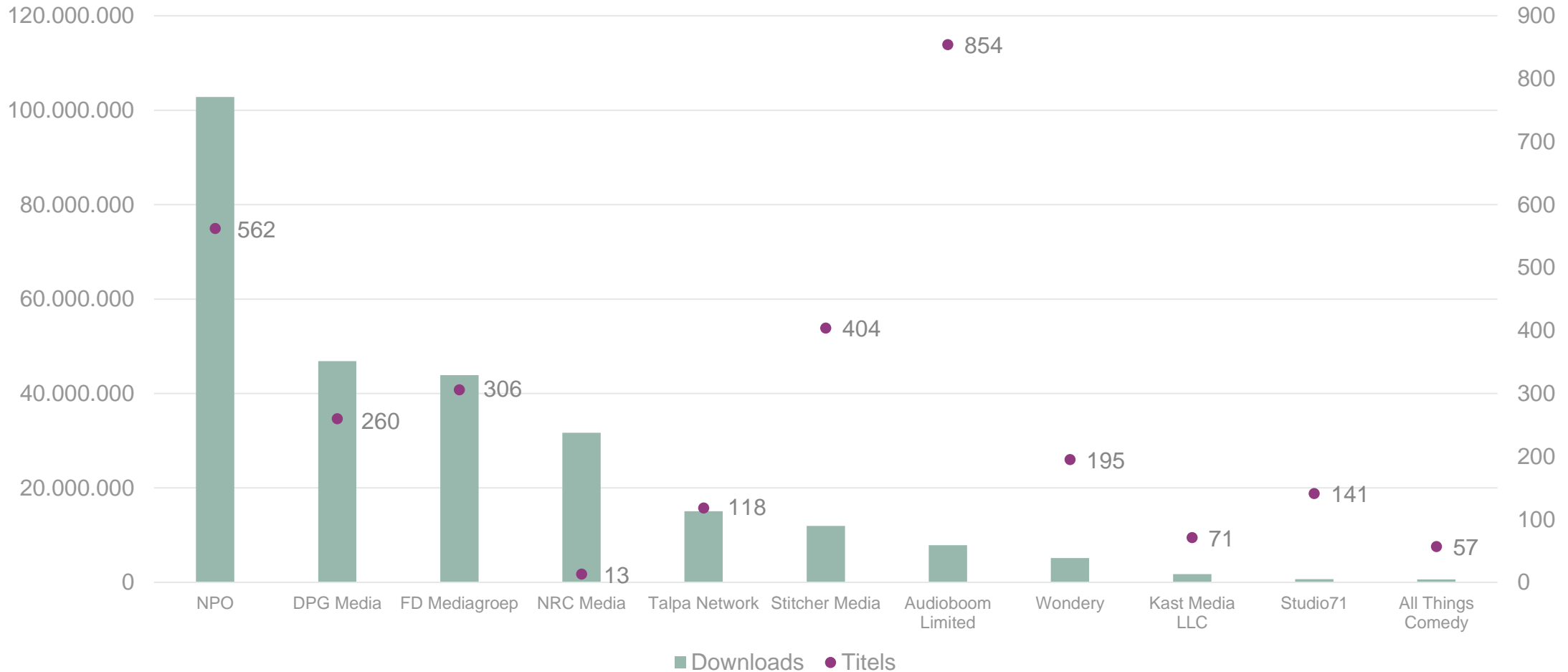
Number of downloads and users show upward trend, partly thanks to increasing number of podcasts in measurement





# NPO passes 100 million downloads mark in 2022

## NRC most downloads per title, on average















# The podcast downloads Top 40 of 2022

## NRC Vandaag, Boekestijn and de Wijk and De Dag lead the top list

	Title	Downloads
1	NRC Vandaag	21,462,682
2	Boekestijn and de Wijk	15,970,904
3	De Dag	14,085,103
4	NU.nl nieuws	7,408,025
5	NOS Met het Oog op Morgen 	7,026,547
6	Eerst dit	6,102,404
7	De Volkskrant Elke Dag	4,922,499
8	De Jortcast	4,905,791
9	AD Voetbal podcast	4,324,950
10	De Stemming van Vullings en v.d. Wulp	4,195,447
11	Nooit meer slapen 	4,111,360
12	Lang verhaal kort	4,049,076
13	In Het Wiel	3,946,711
14	F1 aan Tafel	3,593,584
15	NRC Onbehaarde Apen	3,334,934
16	De Taghi Podcast	3,280,155
17	Het HLN-nieuws	3,050,941
18	538 Nieuws 	2,883,933
19	NRC Haagse Zaken	2,866,703
20	Vandaag Inside	2,642,915

	Title	Downloads
21	Kunststof 	2,438,569
22	BNR De Wereld 	2,205,969
23	NOS Voetbalpodcast	2,173,821
24	Macro met Boot en Mujagić 	2,068,046
25	30 MINUTEN RAUW door Ruud de Wild	1,994,791
26	TV-TALK	1,953,538
27	Argos 	1,788,067
28	Europa draait door 	1,716,074
29	Cocaïnekoorts	1,652,298
30	FD Dagkoers	1,611,057
31	Amerika Podcast	1,584,181
32	BNR's Big Five 	1,572,193
33	AD Media Podcast	1,565,100
34	Alledaagse Vragen 	1,550,804
35	Met Groenteman in de kast	1,529,483
36	Cryptocast	1,528,345
37	OVT Fragmenten podcast 	1,481,714
38	Wetenschap Vandaag 	1,354,974
39	Zakendoen 	1,348,674
40	Crime Junkie	1,317,139

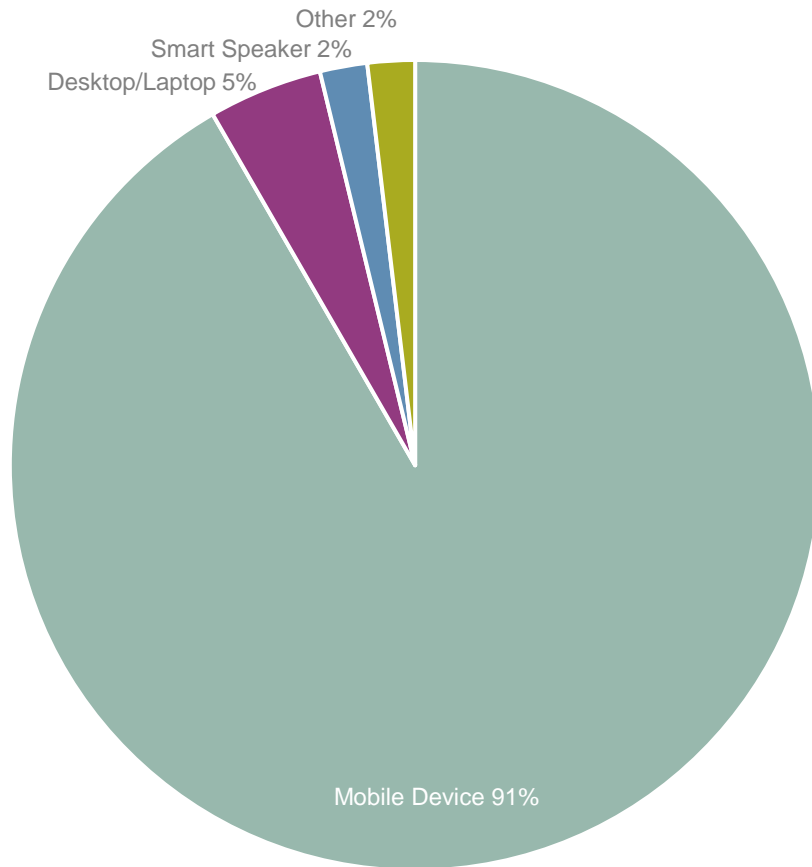




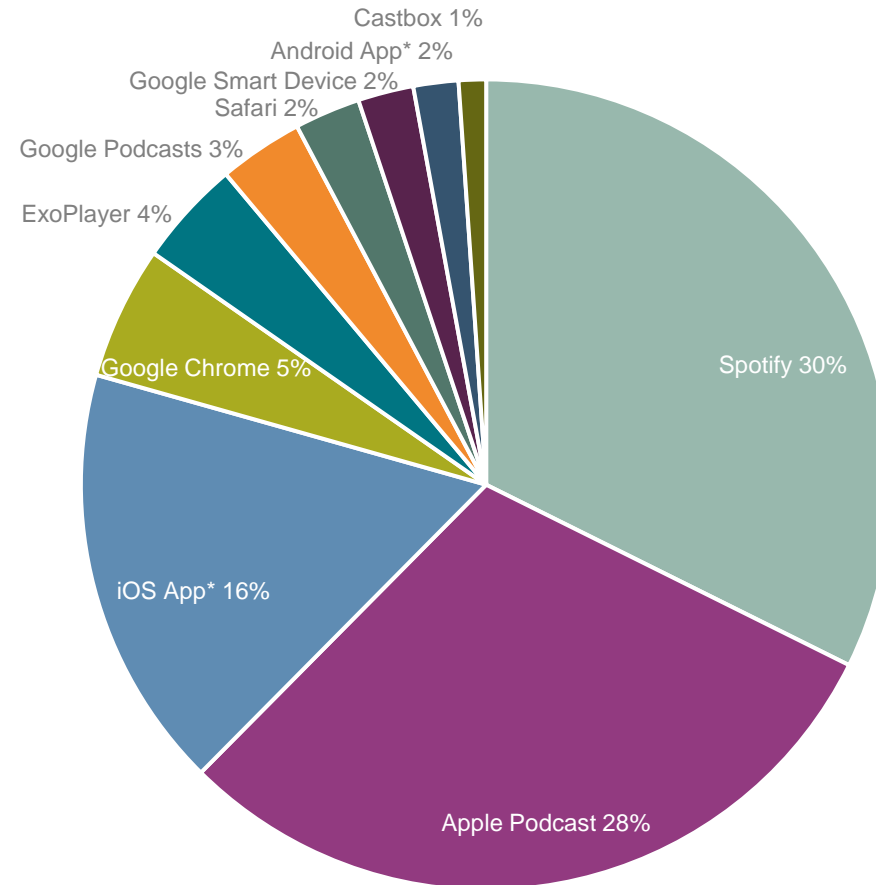
# Mobile most popular device, Spotify most popular platform

Apple Podcast and iOS App popular platforms too

**Device**



**Platform**





# Participants in the NLO Podcast Standard

By now, 2,945 podcasts from 11 media companies are being measured



nederlandse  
publieke  
omroep



**nrc** media >



**WONDERY**



**STUDIO71**

**ATC** ALL THINGS COMEDY

# Chapter 6

Let's listen to audio designers



Hans van Raaij  
*NPO Radio 1*



Jonah Hofman  
*NPO 3FM*



Niels de Koning  
*Qmusic*



Sjoerd Rabbit  
*Talpa Radio*



# Audify



# What does an audio designer do?



I feel responsible for 'the sound of the station'. In practice, this means that all communications by the NPO Radio 1 brand should sound as coming from a single entity as much as possible, without sounding too bland. You can achieve this with central design created by one composer and with station voices Sander Guis and Wendy Duivenvoorde, which are familiar and recognizable voices for the listener.



As an audio designer at 3FM, my team and me are responsible for all the jingles you hear in between the music, but also for the audio design for the news or promotional audio for promotional actions and events. We create a sound that matches the music and feel of 3FM, which creates impact and surprises the listener.



As audio designers, we create all audio in which Qmusic is featured. Both on the radio station and on the digital domains, but also at events like the Foute Party.



As audio designers, we are responsible for the sound image of our radio stations. This includes jingles and promos, as well as musical design for various promotions. The easiest way to explain it on a birthday party is this: we make "the bits" you hear in between songs.



# What education or experience do you need?



Have a good ear, know how to convey emotion in sound and have a good sense of what fits a modern news station. I have a degree in journalism and that's actually a must for NPO Radio 1. My experience as a radio documentary maker comes in handy, because making promos of, say, 40 seconds is really telling a little story.



Above all, you need to have a fascination for radio, be a true radio animal and understand music and music editing. I myself started at local broadcasters, where I was allowed to handle technology, but later I was also allowed to do audio design on a show for kids. I went from being an intern to becoming a full-time audio designer.



There is no specific training for this, in the Netherlands. Most audio designers in the market started with a passion for audio at radio stations and learned the craft in practice.



Unfortunately, there are not really any courses in the Netherlands that focus on the audio design profession. You can learn a lot if you take courses in Sound Design or Music Production, of course, but most of us gained experience from a hobby and then at a (local) radio station. And at that radio station, you will then meet colleagues you can learn a tremendous amount from!



# What is the biggest challenge for audio designers?



Making sure we keep up with the times and presenting a station that is well worth listening to. And creating things that touch listeners, give them goosebumps. The broadcasters are in charge of the content of the channel, but one of the things I do is make sure that all their great ideas are showcased optimally, so that listeners know what we have to offer.



Always be creative. While it is fun to get so creative with audio, it can be quite challenging, at times. Some days the creative juices will flow more than on others, so it can be more of a challenge to come up with something cool. If this happens, it often helps to get started on another project or get inspired by other audio design or other creations.



The biggest challenge is to safeguard the Qmusic brand across all domains and opportunities. For example, the Foute Ur requires a different approach than the Top 40, where the Qmusic identity must always be clearly and recognizably audible.



Because we work for multiple stations, the challenge is to give each station its own "sound", ensuring that when a listener hears audio design they immediately know which station they are listening to. This is to do with the tone of voice, genres and instruments in the jingles, and the use of sound effects, for example. For example, Radio 538 is a true hit station with a tough yet friendly design. Sky Radio is more about feel-good vibes, the voice-over has a smile and the jingles are upbeat.



## What well-known audio design are you behind?



No tunes and jingles, that honour really falls to our designers at KH Music. But there are plenty of promos over the (many) years that I have made.



I have been involved in audio design at 3FM since 2013, initially working on audio design of shows from BNN as was, the NTR and KRO-NCRV and since 2015 I have been involved in all station-wide audio design at 3FM.



Het Geluid is a well-known campaign but I also created the jingles of the Top 40 it came to our station in 2019. The Top 40 has been an institution for many years and we respect its history yet have also given it a Qmusic sound.



At the moment I work for all the channels of Talpa Network, which means I'm handling a lot of different projects. If I had to pick something I'm really proud of, it would be the news design for Sky Radio and Radio Veronica and the jingle packages for Radio 538, Radio 10 and Sky Radio.



# Why is audio design so important?



The content of a radio station must be supported by an audio package that support the identity of the station. What we bring as NPO Radio 1 is, of course, news, sports, culture, in-depth items, backgrounds and issues from multiple angles. All this is also reflected in our audio design.



It creates an ambiance and it lend a certain recognizability and an image to your radio brand, it's a house style that you apply to the station. With fixed ingredients such as regular station voices and a recognizable audio logo.



Qmusic thus exudes its own identity and vibe; you can think of it as the house style in sound. Qmusic stands for energy, positivity and feeling like every day is a Friday. You won't hear ballads in our jingles, although we play hits by Adele, for example, but we deliberately surround them with high-energy audio. We also create special Qmusic hit intros with our regular voices, connecting the brand with the hits that we play in a recognizable way.



Audio design lends a radio station its identity. While people feel it is obvious that a company has a visual image for a company, for radio in particular it is even more important to also have a recognizable 'face' in audio. This can be done, for example, with a strong audio logo, the ambiance and vibes felt through jingles and promos, a good (sung) slogan and, of course, your station voice.





# Does audio design have an expiration date?



Absolutely. We refresh the design, change an audio logo, adjust tunes more than we used to do before. If you listen to the station now compared to five years ago, we already sound quite different, more contemporary, more modern. At the same time, you have to be safeguard your recognizability and not change the whole thing at once. NPO Radio 1 is a familiar and recognizable brand.



Yes, but this one is hard to define. The traffic jam song in the Coen and Sander Show was a song you heard as a listener every day and if it wouldn't be there, the show just wouldn't be complete. Then again, you don't want the audio design to sound past its prime and old. It can be quite refreshing to update the audio design.



Especially at Qmusic, because we are a hit station with current music and new trends, so the turnaround time is short. Normally with a jingle package will last you 3 to 4 years, with us it is often two years tops.



Not always, but often. A recognizable show jingle can be timeless, but we can no longer use with a Radio 538 jingle package from 2002. Music has changed, the vibe of the station has changed, and production techniques are also evolving at a rapid pace.



# What can we expect in 2023?



We will continue to refine, keep our finger on the pulse and make sure we remain recognizable and familiar to listeners, both linearly and online and on demand with podcasts.



We'll continue to innovate in 2023 and strive to do our best work. 3FM's slogan is *We Want More*, with us you want to get more out of your radio. More out of your morning and more out of your afternoon; more out of your day. But also more out of the audio design: *We Want More* audio design!



A lot is going to happen in 2023. Among other things, there will be new audio design for this year's Top 40 and the Foute Uur. Also, it is a special radio year given the auction of FM frequencies. Improved listening research is also going to give us new insights.



We are going to do a lot of great things this year! We are currently producing new jingle packages for Radio 538 and Radio 10. These are always labour-intensive production processes, where we take another step in the image of the channels. And, of course, it will be an exciting year with the upcoming developments around FM frequencies and the new NMO listening survey.



**Looking ahead to 2023**



**Audify**



**Audify**

## Audio market moves to new measurement method

On 1 January 2023, the renewed NMO Listening Survey, based on passive measurement, was kicked off. Ipsos' MediaCell+ app uses audio matching technology to record which station is 'switched on'. In addition, watermarking (an inaudible code in the audio signal) is used to determine which platform is being listened to, such as FM, DAB+ or the Internet.

The new measurement method provides more opportunities for (strategic) planning of radio advertising campaigns. The listening data are much more comprehensive and fine-grained. The new method measures and reports at the minute level and many more linear channels are measured, including theme channels. This makes it possible to better understand events and actions on radio. Listening figures will now be made available on a weekly basis (every Wednesday at 2 p.m.), where previously they were provided monthly. This makes it possible to optimize radio campaigns in between measurements.





# Different data, listening behaviour not changed

The new measurement method changes the definition of radio listening from ‘listened to according to the respondent’ to ‘technically audible to the meter’. As a result, the new passive measurement of listening behaviour yields different data. It is important to emphasize that, of course, consumer listening behaviour has not actually changed. Listening behaviour is only measured differently. The same audio campaign still has the same impact and effect as before.

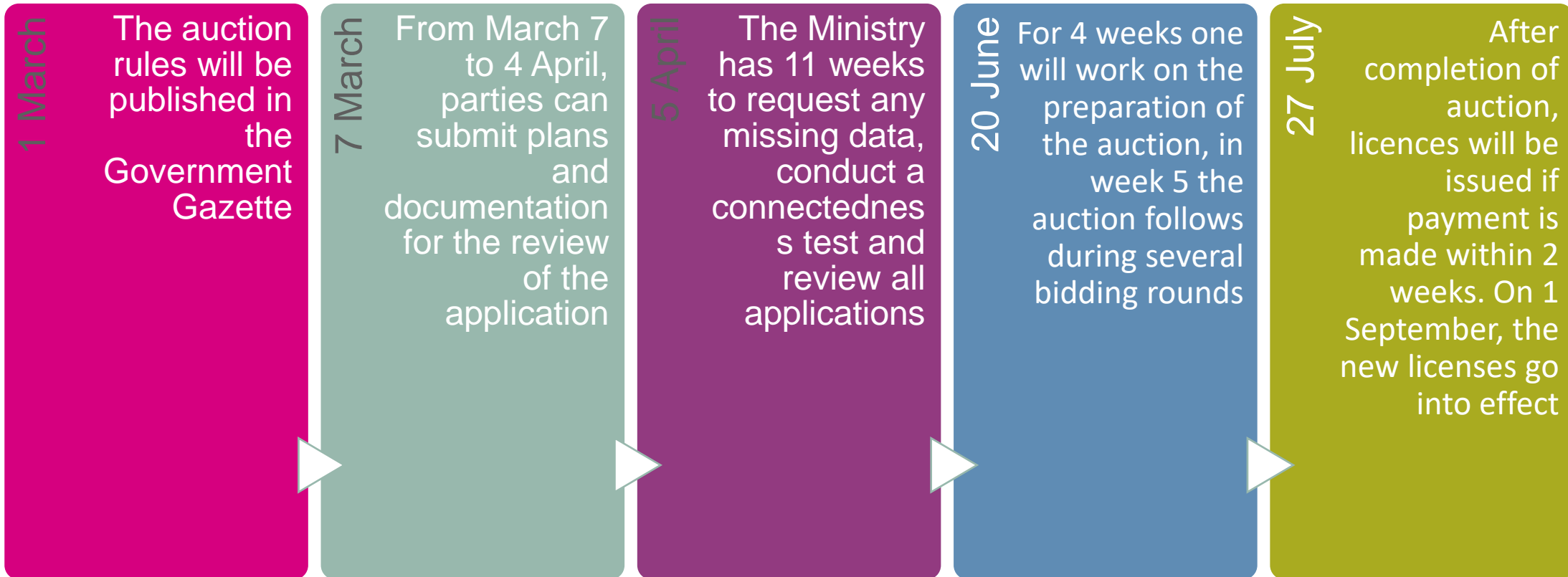
In the new method, an advertiser gets the same number of spots for the same budget. Listening density did change, though. Given this fact, the NMO communicated the transition index. It is based on the old and new survey in the period Oct-Nov 2022 in the time period Mon-Sun 06:00-24:00.

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



# Planning FM auction 2023

9 FM frequencies, 2 of which are cloused, re-auctioned by 1 September 2023 for 12 years





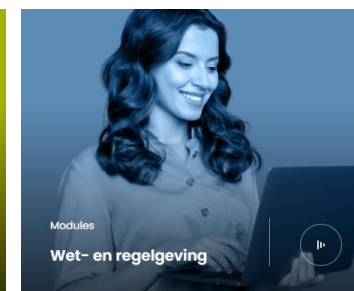
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# Become Soundmaster through the Audify Academy

**Register now at [audify.nl](https://audify.nl)**

The world of sound is evolving rapidly, providing plenty of opportunities for brands and communications. Audify wants to contribute to the professionalization of the audio domain and further develop the use of audio by professionals.

The training - developed by the leading specialists in the media and audio profession - consists of several modules offered through an online e-learning platform. So it's up to you when and at what pace you'll follow the module. You conclude each module with a test to earn your certificate and NIMA PE points. For people from the trade, Audify covers the costs of 499 euros per module.



**About the 2022 Audify audio annual  
report**







**Audify**

# About the 2022 Audify audio annual report

This is the 2022 Audify audio annual report. The report identifies investments and listening behaviour to radio, streaming audio, podcasts and audio on demand. Net investments are reported to Stichting Audify by all national and regional, public and commercial radio stations. All amounts are exclusive of VAT and a 15% agency discount. Investments in radio advertising are split up into spot, digital and branded content.

Sources used:

- Stichting Nationaal Luister Onderzoek (NLO)
- Nielsen
- Triton Digital
- GfK
- Adfact
- SoundAware

This report was issued on 13 March 2023 and created in collaboration with Audify by Featly Media and the above parties. If you have questions, comments or suggestions regarding the Audify Audio Annual Report 2022, please contact Audify ([info@audify.nl](mailto:info@audify.nl)).



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