
Radio : The Netherlands

4.1. General indicators

Number of subscriptions or connections based on total population

	1996	1997	1998	1999	2000	2001
All population (000)	15.493.000	15.567.000	15.564.000	15.760.000	15.863.000	16.000.000
Universe 13+ (000)	12.620.000	12.631.000	12.705.000	12.785.000	12.989.000	NA
Total Radio Households	63.610.000	6.362.000	6.378.000	6.463.000	6.500.000	NA
Total Radio Equipped adults 13+	12.250.000	12.277.000	12.285.000	12.363.000	12.521.000	NA
Radio connected on central antenna/cable (on household level)	72,1%	73,5%	74,7%	74,8%	76,5%	NA

Comments : Target 15+ is not available. All audience variables are based on 13+

4.2. Advertising categories

Advertising Category :

Dutch Definitions

	Does this advertising category exist in your country ?	Is this advertising category used in your country ?	Define every advertising mode listed (precise if not allowed or not existing)	Which specific aspects define this kind of ad ? (Length, content, ...)
Commercial Spots :	Yes	Yes	Normal spot used for product or services	20"
Billboard Spots :	Yes	Yes	tarif based on secondtarif and maximum of 5 seconds	tailor made
Sponsoring Spots :	Yes	Yes	tailor made	tailor made
Station Self Promotion Program :	Yes	Yes	promotion spots for the station activities	tailor made
Commercial Self Promotion Spots :	Yes	Yes	promotion spots for the station commercial offers	tailor made
Direct Response Radio Spots :	Yes	Yes	respons actions within radio programm	tailor made
Inserts or Product Placement Program :	Yes	Yes	insertion of products by advertisers within radioprogramms	tailor made
Inserts or Product Placement Spots :	Yes	No	not used so far	tailor made

Advertising Category : Dutch Definitions (2)

	Are they measured...		Value definition mode ?
	... for audiences ?	... for investments ?	
Commercial Spots :	Yes	Yes	Only measured on level of commercials
Billboard Spots :	No	No	None
Sponsoring Spots :	No	No	None
Station Self Promotion Program :	No	No	None
Commercial Self Promotion Spots :	No	No	None
Direct Response Radio Spots :	No	No	None
Inserts or Product Placement Program :	No	No	None
Inserts or Product Placement Spots :	No	No	None

Radio The Netherlands

4.3. General information by station

About Radio Stations

Types of broadcast during 1996-2001

	Status	Names	Active Period		Station Type
			Founded	Ended**	
Domestic Radios (national) *	Public	Radio 1	1927		News & Business
	Public	Radio 2	1927		Music & General Interest
	Public	Radio 3 FM	1965		Music & Entertainment
	Public	Radio 4 (classic)	1974		Other to define
	Public	747 AM (previous Radio 5)	1983		Talk (70%)
	Private	Sky radio (no deejays only soft pop music)	1988		Music (70%)
	Private	Radio 10 FM	1988		Music & Entertainment
	Private	Radio 538	1993		Music & Entertainment
	Private	Yorin FM	1995		Music & Entertainment
	Private	Noordzee FM	1993		Music & Entertainment
	Private	Kink FM (previous Happy RTL / RTL Rock Radio)	1992		Music (70%)
	Private	Business News Radio	1998		News & Business
	Private	Love Radio	1991		Music & Entertainment
	Private	ID & T radio (previous Slam FM and Slam FM was prev	2000		Music (70%)
	Private	Qthe Beat	1998		Music (70%)
	Private	Arrow Classic Rock	1996		Music (70%)
	Private	Classic FM (classic)	1994		Other to define
	Private	Veronica Nieuws Radio	1995	1996	News & Business
	Private	Country FM	1998		Music & Entertainment
	Public	Concertzender (started as local radiostation in amsterd	1993	2000	Other to define
Private	JFK Jazz Radio (previuos EuroJazz)	1990	1998	Other to define	

Comments About Radio Stations

- Redivision of radio frequencies will determine the market
 - A hot and lively discussion is going on between commercial radio stations, public radiostations and the government concerning the auction of radiofrequencies.
 - The general expectation is that if the public stations are to join the auction, prices of the frequencies will go up. If on the other hand they are exempted than the question arises if they will get to keep the number of frequencies they currently have at their disposal. Confusion is omnipresent in this case.
 - One thing remains sure: we expect that the government has learned from the problems which occurred during and after UMTS auction, which resulted in lower profits, in order to reach satisfactory yields this time round.
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Comments About Radio Stations

- All private radios are broadcasted by cable but the major players have also a FM frequency (not national coverage) which frequency depends on the station
- Cable companies do broadcast public foreign radio like e.g. BBC Worldservice WDR / NDR (Deutsch) Studio Brussel (Flemish) but these are nihil players

About Radio Stations

Types of broadcast during 1995-2001

	Status	Names	Active Period		Station Type
			Founded	Ended**	
Regional Radios**	Public	Omrop Fryslân	1978		Music & General Interest
	Public	Radio Noord	1946		Music & General Interest
	Public	Radio Drenthe	1946		Music & General Interest
	Public	Radio Oost	1987		Music & General Interest
	Public	Radio Gelderland	1987		Music & General Interest
	Public	Radio M	1989		Music & General Interest
	Public	Radio Noord Holland	1988		Music & General Interest
	Public	Radio West	1985		Music & General Interest
	Public	Radio Rijnmond	1983		Music & General Interest
	Public	Omroep Zeeland	1988		Music & General Interest
	Public	Omroep Brabant	1976		Music & General Interest
	Public	Omroep Limbrug	1986		Music & General Interest
	Public	Omroep Flevoland	1988		Music & General Interest

About Radio Stations

Types of broadcast during 1995-2001 (2)

	Status	Names	Active Period		Station Type
			Founded	Ended**	
Regional Radios**	Private	City FM Amsterdam	1996		Music (70%)
	Private	System FM	1999		Music (70%)
	Private	SR Rotterdam	1992		Music (70%)
	Private	SR Utrecht	2000		Music (70%)
	Private	SR Den Haag	1994		Music (70%)
	Private	8 FM	1999		Music (70%)
	Private	Sun FM	1995		Music (70%)
	Private	Fresh	1999		Music (70%)
	Private	Keizerstad FM	1999		Music (70%)
	Private	Rebecca Radio	1997		Music (70%)
	Private	Hot Radio	1998		Music (70%)
Private	Happy FM	1999		Music (70%)	

Comments about stations types

Comments:

- Sky radio : no deejays only soft pop music
- Kink FM : previous Happy RTL / RTL Rock Radio
- 747 AM : previous Radio 5
- ID & Tradio : previous Slam FM
- Concertzender : started as local radiostation in Amsterdam and now supported by public broadcaster NOS
- JFK Jazz Radio : previous EuroJazz

- All Public regional radios are represented by 1 sales organisation ORN
- All main Private regional radios are represented by 1 sales organisation CRN or LRN

About Radio Stations

Types of broadcast during 1996-2001

Names	Transmission Mode	Main Reception Mode	Numerical Services on Program Level	Numerical Services on Commercial Level	Comments transmission/reception mode, numerical services/advertising and/or station type
Radio 1	FM	Radio	Yes	Yes	FM and AM National coverage
Radio 2	FM	Radio	Yes	Yes	FM National coverage
Radio 3 FM	FM	Radio	Yes	Yes	FM National coverage
Radio 4	FM	Radio	Yes	Yes	FM National coverage
747 AM	AM	Radio	Yes	Yes	AM National coverage
Sky radio	Radio Cable	Radio	Yes	Yes	Cable and FM (not entirely national coverage)
Radio 10 FM	Radio Cable	Radio	Yes	Yes	Cable and FM (not entirely national coverage)
Radio 538	Radio Cable	Radio	Yes	Yes	Cable and FM (not entirely national coverage)
Yorin FM	Radio Cable	Radio	Yes	Yes	Cable and FM (not entirely national coverage)
Noordzee FM	Radio Cable	Radio	Yes	Yes	Cable and FM (not entirely national coverage)

About Radio Stations

Types of broadcast during 1996-2001 (2)

Names	Transmission Mode	Main Reception Mode	Numerical Services on Program Level	Numerical Services on Commercial Level	Comments transmission/reception mode, numerical services/advertising and/or station type
Kink FM	Radio Cable	Radio	Yes	Yes	Cable and FM (not entirely national coverage)
Business News Radio	Radio Cable	Radio	Yes	Yes	Cable and FM (not entirely national coverage)
Love Radio	Radio Cable	Radio	Yes	Yes	Cable and FM (not entirely national coverage)
ID & T radio	Radio Cable	Radio	Yes	Yes	Cable and FM (not entirely national coverage)
Qthe Beat	Radio Cable	Radio	Yes	Yes	Cable and AM (not entirely national coverage)
Arrow Classic Rock	Radio Cable	Radio	Yes	Yes	AM National coverage
Classic FM	Radio Cable	Radio	Yes	Yes	Cable and FM (not entirely national coverage)
Veronica Nieuws Radio	Radio Cable	Radio	Yes	Yes	Cable
Country FM	Radio Cable	Radio	Yes	Yes	Cable and FM (not entirely national coverage)
Concertzender	Radio Cable	Radio	Yes	No	Cable and FM (not entirely national coverage)
JFK Jazz Radio	Radio Cable	Radio	Yes	Yes	Cable and FM (not entirely national coverage)

About Radio Stations

Types of broadcast during 1996-2001

Names	Transmission Mode	Main Reception Mode	Numerical Services on Program Level	Numerical Services on Commercial Level	Comments transmission/reception mode, numerical services/advertising and/or station type
Omrop Fryslân	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Radio Noord	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Radio Drenthe	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Radio Oost	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Radio Gelderland	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Radio M	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Radio Noord Holland	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Radio West	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Radio Rijnmond	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Omroep Zeeland	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Omroep Brabant	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Omroep Limbrug	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)

About Radio Stations

Types of broadcast during 1996-2001 (2)

Names	Transmission Mode	Main Reception Mode	Numerical Services on Program Level	Numerical Services on Commercial Level	Comments transmission/reception mode, numerical services/advertising and/or station type
Omroep Flevoland	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
City FM Amsterdam	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
System FM	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
SR Rotterdam	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
SR Utrecht	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
SR Den Haag	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
8 FM	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Sun FM	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Fresh	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Keizerstad FM	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Rebecca Radio	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Hot Radio	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)
Happy FM	FM	Radio	Yes	Yes	Cable and FM (only coverage for that specific region)

4.4. Commercial Offer

Commercial Offer in 2001* (1)

	Name of Radio	Name	Capital shares holding (precise majors with parts and name)				
			Private 1	Private 2	Private 3	Private n	Public
Domestic Radio Stations	Radio 1	Name					Public broadcasters
		Part (%)					100%
	Radio 2	Name					Public broadcasters
		Part (%)					100%
	Radio 3 FM	Name					Public broadcasters
		Part (%)					100%
	Radio 4	Name					Public broadcasters
		Part (%)					100%
	Radio 5	Name					Public broadcasters
		Part (%)					100%
	Sky Radio	Name	News International (Rupert Murdoch)	Private 2			
		Part (%)	71,50%	28,50%			
	Radio 10 FM	Name	Wegener Radio & TV				
		Part (%)	100%				
	Radio 538	Name	Privat investors	News International			
		Part (%)	58%	42%			
	Yorin FM	Name	HMG				
		Part (%)	100%				

Commercial Offer in 2001* (2)

	Name of Radio		Capital shares holding (precise majors with parts and name)				
			Private 1	Private 2	Private 3	Private n	Public
Domestic Radio Stations	Noordzee FM	Name	SBS Broadcasting	Strengholt			
		Part (%)	51%	49%			
	Kink FM	Name	Vereniging Veronica	Mojo concerts			
		Part (%)	80%	20%			
	Business News Radio	Name	Manaus Business Development BV	Michiel Bicker Caarten	Wegener Arcade BV	Willem van Kooten	
		Part (%)	30%	15%	25%	30%	
	Love Radio	Name	Wegener Radio & TV				
		Part (%)	100%				
	ID & T Radio	Name					
		Part (%)					
Qthe Beat	Name	The beat goes on BV					
	Part (%)	100%					
ID & T Radio	Name	ID & T					
	Part (%)	100%					
Arrow Classic Rock	Name	Mediad					
	Part (%)	100%					
Classic FM	Name	Sky Radio 100.7FM	Classic FM PLC				
	Part (%)	50%	50%				

Commercial Offer in 2001* (3)

	Name of Radio	Name of Sales houses	Radio's Target Group
Domestic Radio stations	Radio 1	STER	business to business sport and news
		STER	AB 1
	Radio 2	STER	business to business (during traffic jams)
		STER	Shoppers (daytime)
	Radio 3 FM	STER	13-34 years
		STER	20-49 and 20-49 AB1
	Radio 4	STER	business to business
		STER	AB1 classical music fans
	Radio 5	STER	business to business
		STER	AB1 cultural / opinion
Sky Radio	Sky Radio 100.7 FM	13-49, Business to business, shoppers 20-49 AB1 20-49	
Radio 10 FM	Radio 10 FM	20-49 shoppers and shoppers with kids	
Radio 538	Radio 538	13-34 years	
Yorin FM	IPN	20-34 years	

Commercial Offer in 2001* (4)

	Name of Radio	Name of Sales houses	Radio's Target Group
Domestic Radio stations	Noordzee FM	Noordzee FM	20-34 shoppers
	Kink FM	Kink FM	alternative festival rock college people
	Business News Radio	Business News	Business to business AB1 and people who are interested in financial news
	Love Radio	Love Radio / Radio 10 FM	women 20-34
	ID & T Radio		
	Qthe Beat	Media Matters	young dance audience 13-34 years living in the cities
	ID & T Radio	ID & T	young adults 18-35
	Arrow Classic Rock	Arrow Classic Rock Radio	20-49 AB1 men
	Classic FM	Classic FM	AB1, 35-55 business to business

Commercial Offer in 2001* (1)

	Name of Radio	Capital shares holding (precise majors with parts and name)					
		Private 1	Private 2	Private 3	Private n	Public	
Regional	ORN	Name					ROOS all public stations are organised in this organisation
		Part (%)					100
	CRN	Name	all local private				
		Part (%)		100			

Commercial Offer in 2001* (2)

	Name of Radio	Name of Sales houses	Radio's Target Group
Regional	ORN	ORN	business to business shoppers
	CRN	CRN	shoppers 20-49

Commercial Offer in 2001* (in Euro)

	Name of Radios	Average Rates in 2001* - All Day - base 30 sec. - Euro only p				
		Commercial Spots 30 second normally it is 20 seconds	Billboard Spots based on second tarif	Sponsoring Spots based on second tarif	Commercial Auto Promotion Spots	Direct Response Spots
Domestic Radio stations*	Radio 1	419,14	13,97	13,97	tailor made	tailor made
	Radio 2	441,15	14,7	14,7	tailor made	tailor made
	Radio 3 FM	904,24	30,14	30,14	tailor made	tailor made
	Radio 4 (classic)	only packages			tailor made	tailor made
	747 AM (previous Radio 5)	not existing			tailor made	tailor made
	Sky radio (no deejays only soft pop music)	1314,04	43,8	43,8	tailor made	tailor made
	Radio 10 FM	500,1	16,67	16,67	tailor made	tailor made
	Radio 538	832,59	27,75	27,75	tailor made	tailor made
	Yorin FM	341,4	11,38	11,38	tailor made	tailor made
	Noordzee FM	373,2	12,44	12,44	tailor made	tailor made
	Kink FM (previous Happy RTL / RTL Rock Radio)	40,5	1,35	1,35	tailor made	tailor made
	Business News Radio	166,05	5,53	5,53	tailor made	tailor made
	Love Radio	48	1,6	1,6	tailor made	tailor made
	ID & T radio (previous Slam FM)	135,3	4,51	4,51	tailor made	tailor made
	Qthe Beat	49	1,63	1,63	tailor made	tailor made
	Arrow Classic Rock	194,6	6,48	6,48	tailor made	tailor made
	Classic FM (classic)	151,5	5,05	5,05	tailor made	tailor made

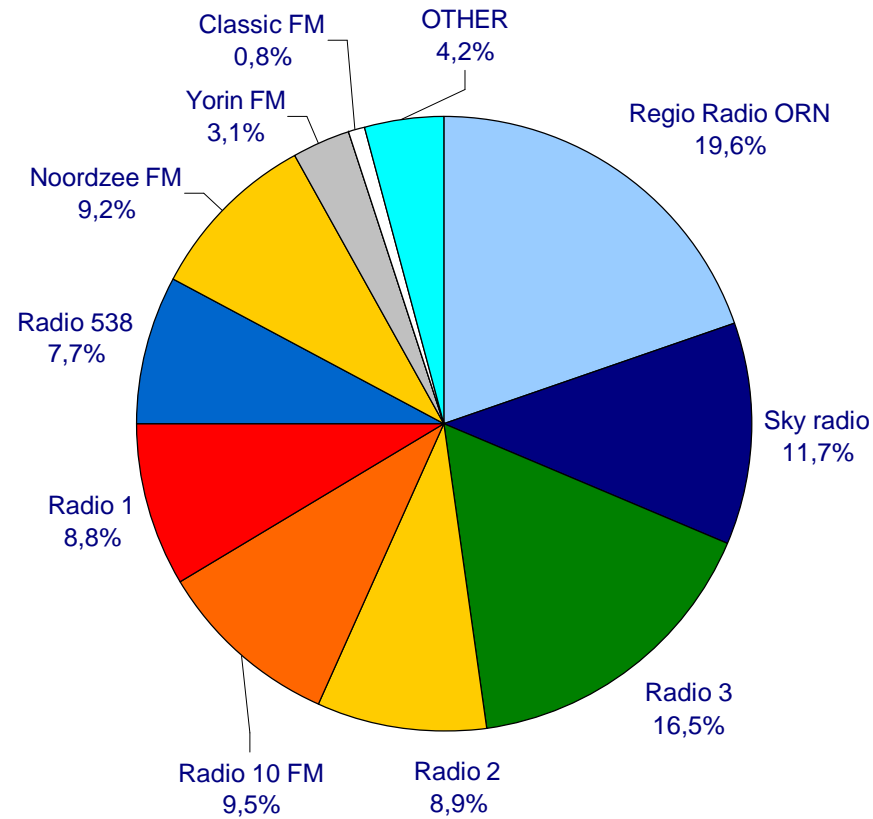
Commercial Offer in 2001* (in Euro)

Name of Radios		Average Rates in 2001* - All Day - base 30 sec. - Euro only please						
		Commercial Spots 30 second normally it is 20 seconds	Billboard Spots based on second tarif	Sponsoring Spots based on second tarif	Commercial Auto Promotion Spots	Direct Response Spots	Insert or Product Placement Spots	Others
Regional	CRN (all private commercial radiostations)	263,59	8,78	8,78	tailor made	tailor made	tailor made	tailor made
	ORN (all private public radio stations)	790,12	26,33	26,33	tailor made	tailor made	tailor made	tailor made

4.5. Audiences

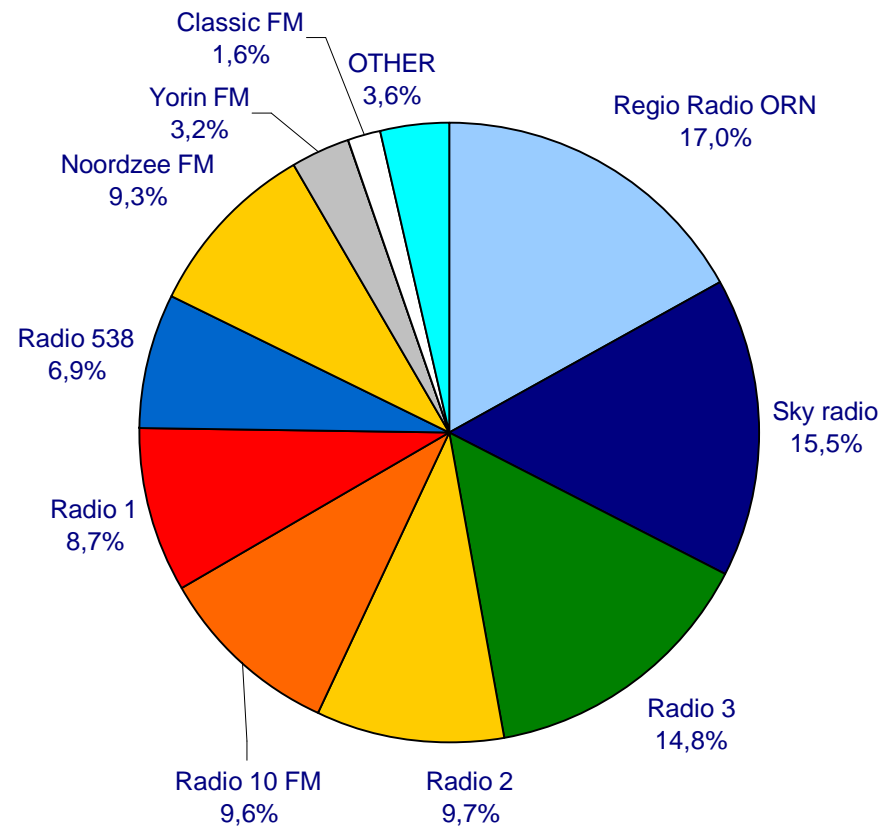
About Audience - 1996

Share of Market (%) - Target : 13+ (All Day)



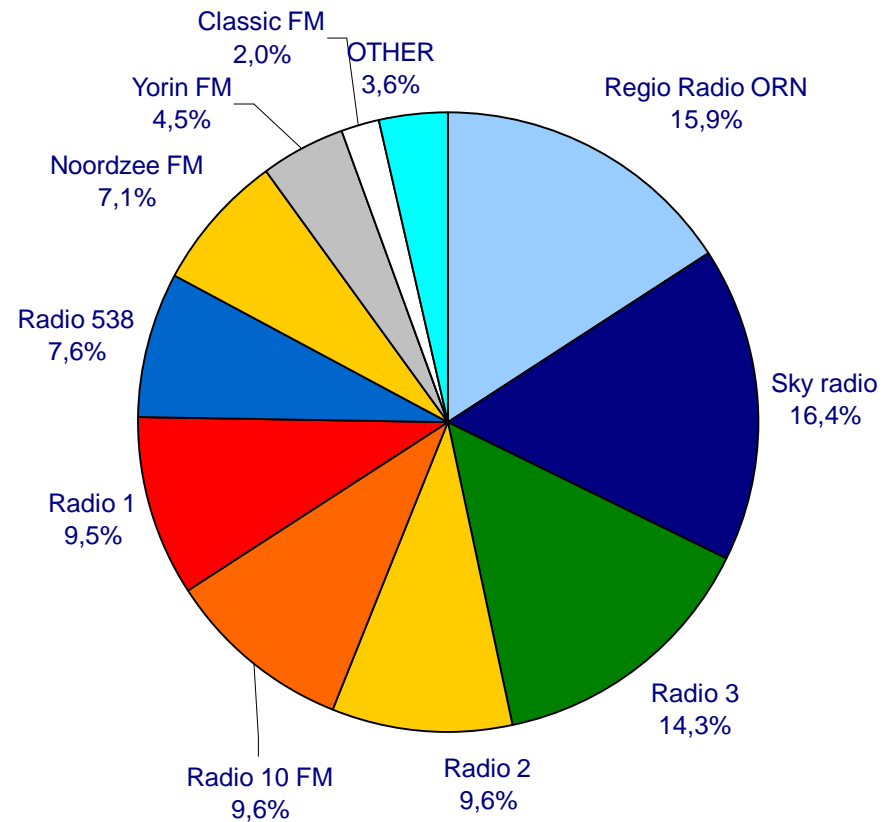
About Audience - 1997

Share of Market (%) - Target : 13+ (All Day)



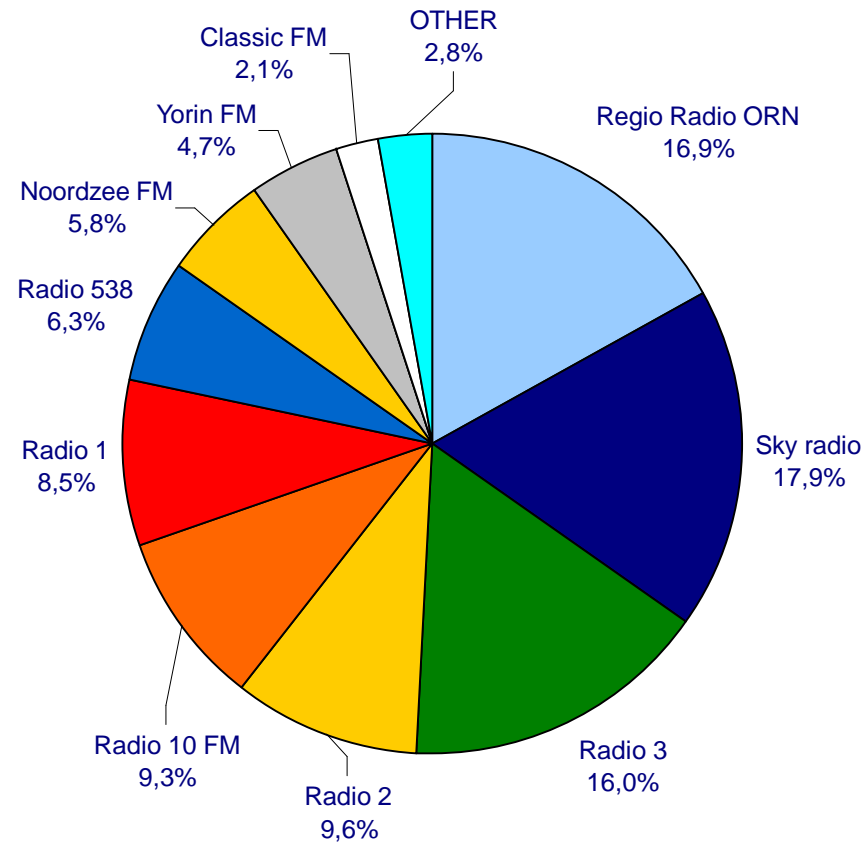
About Audience - 1998

Share of Market (%) - Target : 13+ (All Day)



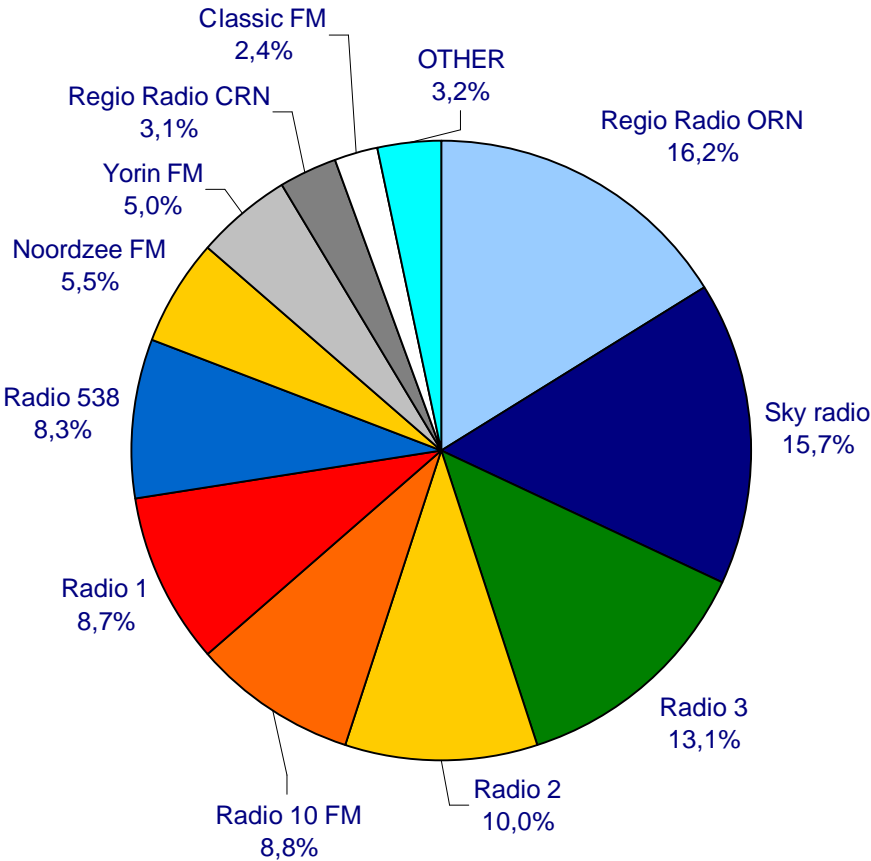
About Audience - 1999

Share of Market (%) - Target : 13+ (All Day)



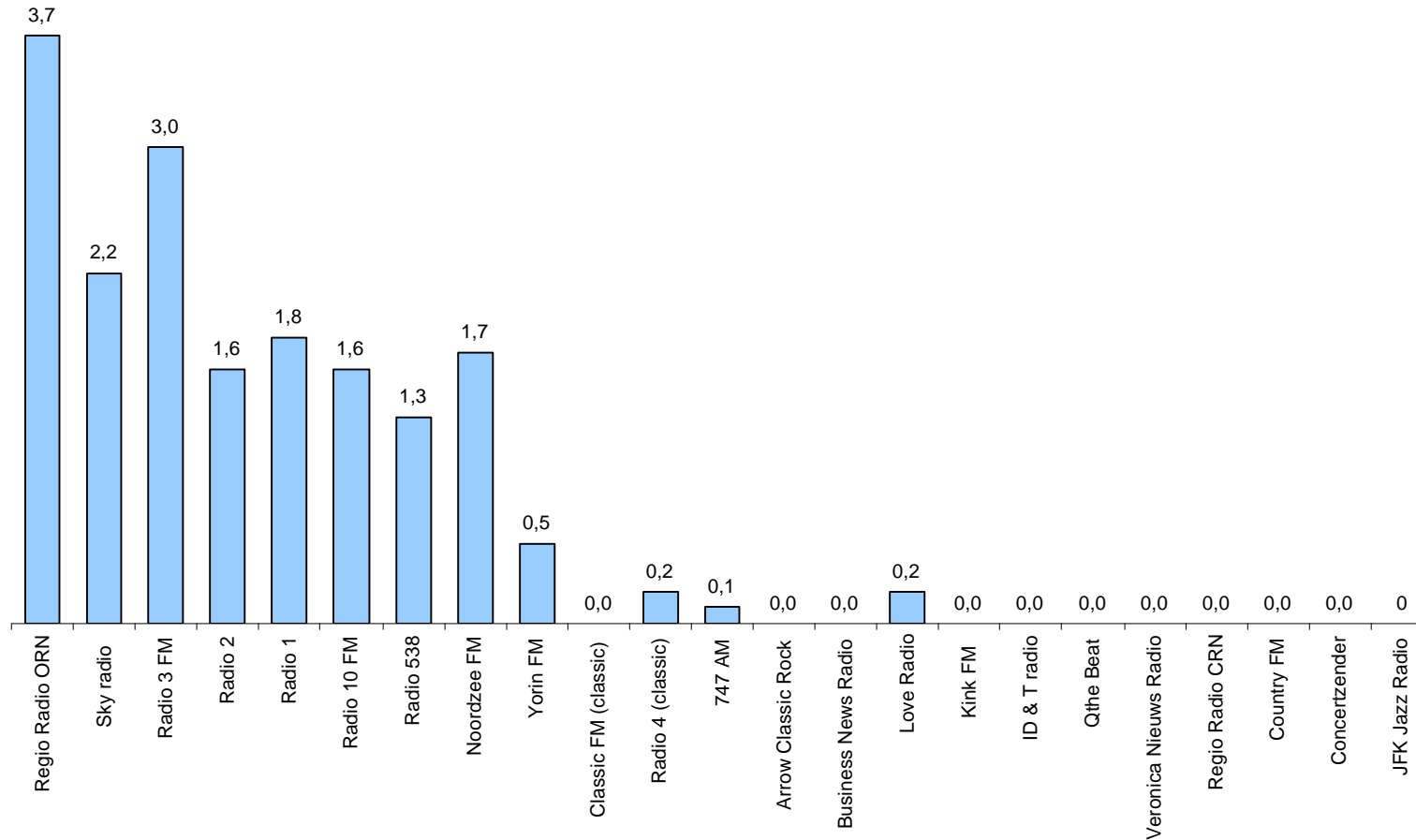
About Audience - 2000

Share of Market (%) - Target : 13+ (All Day)



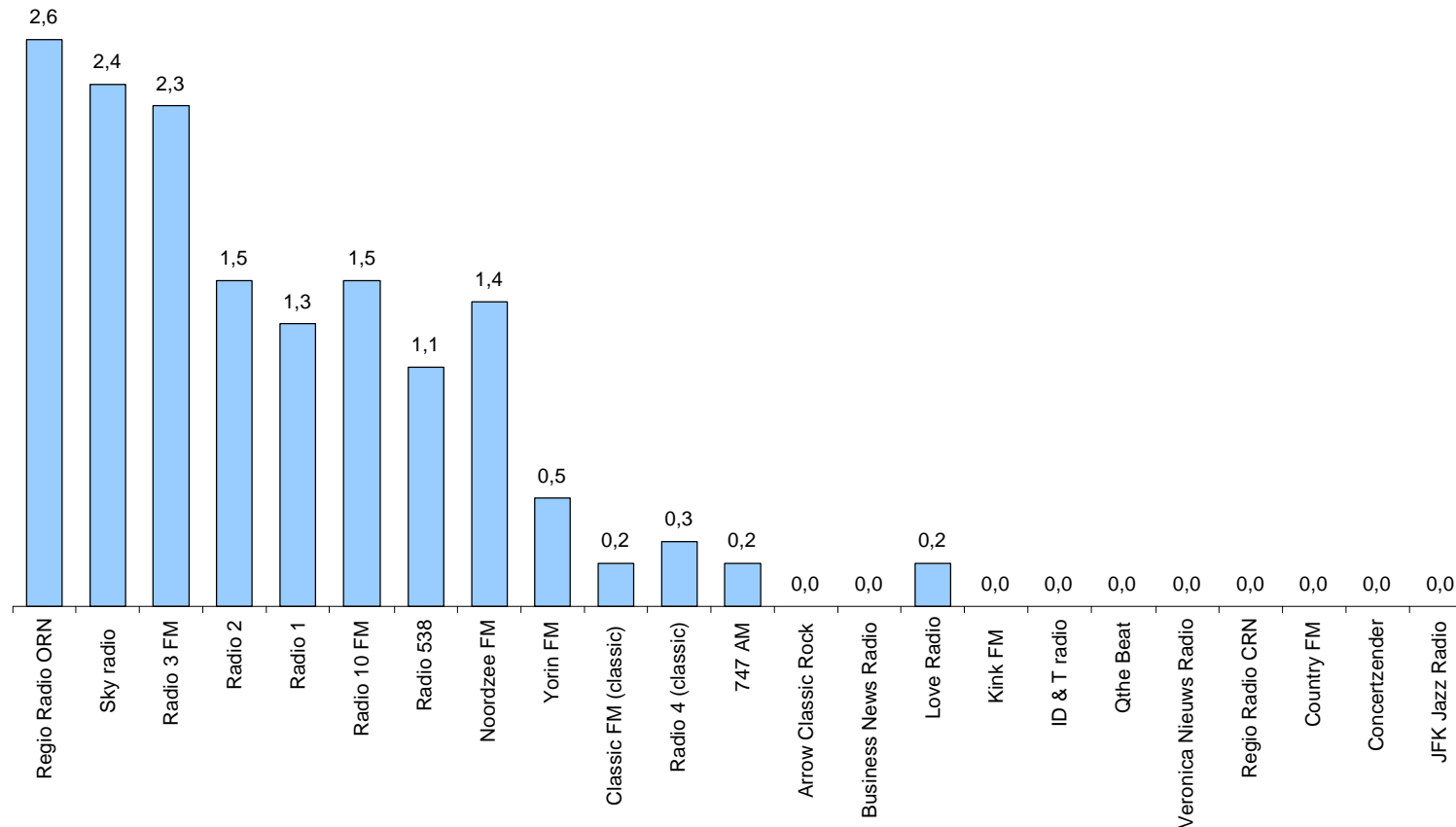
About Audience - 1996

Average Rating (%) - Target : 13+ (All Day)



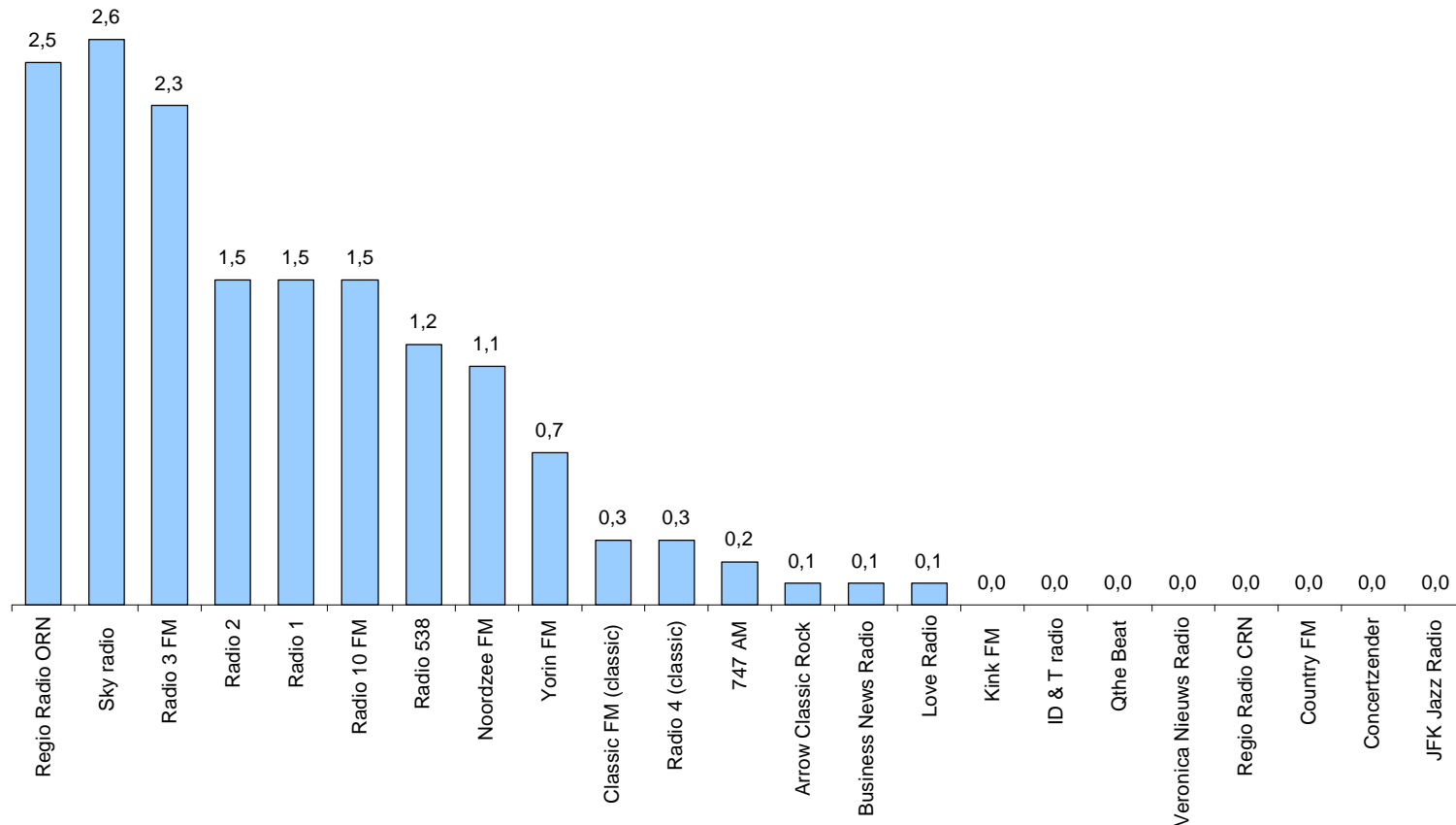
About Audience - 1997

Average Rating (%) - Target : 13+ (All Day)



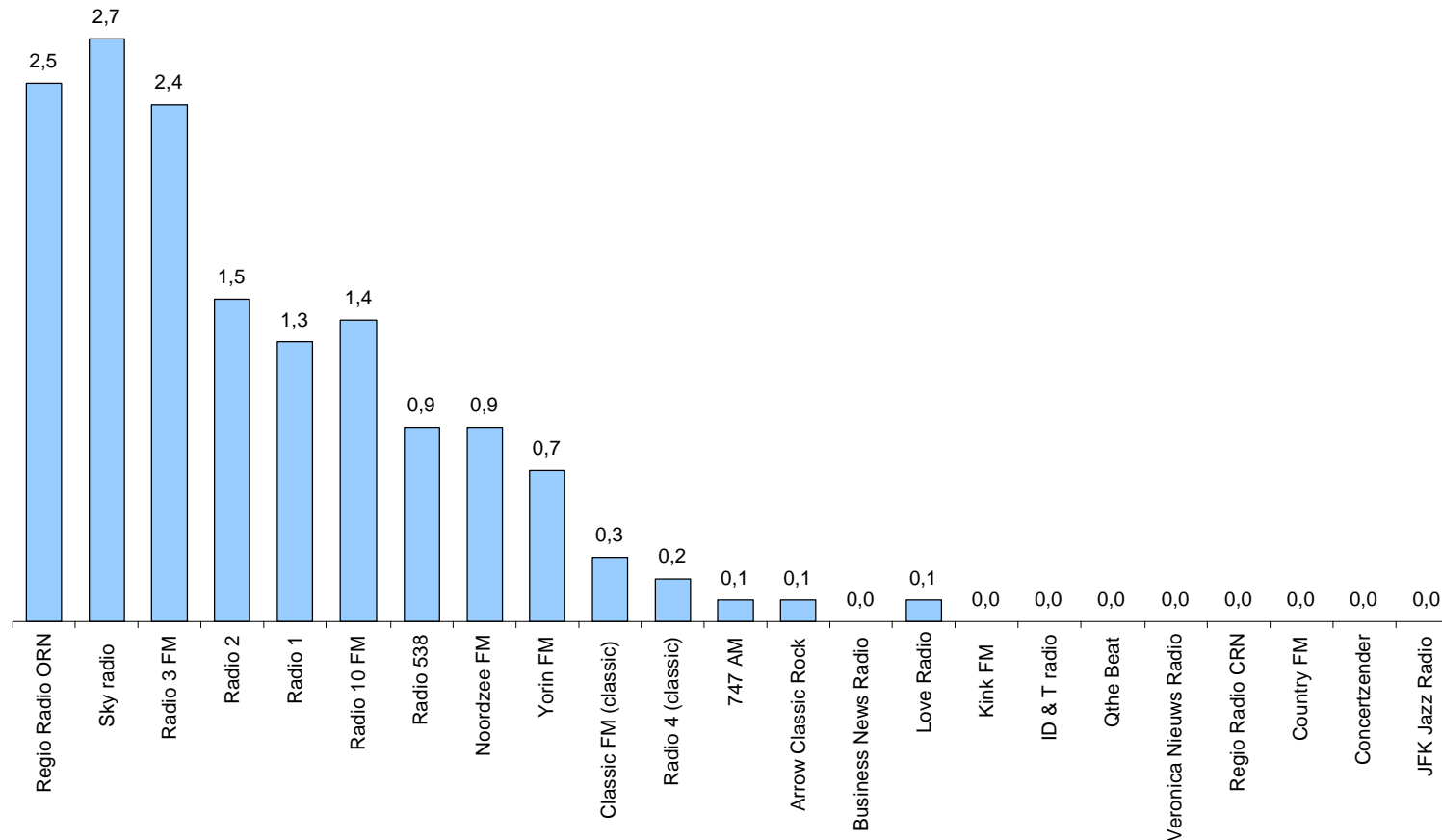
About Audience - 1998

Average Rating (%) - Target : 13+ (All Day)



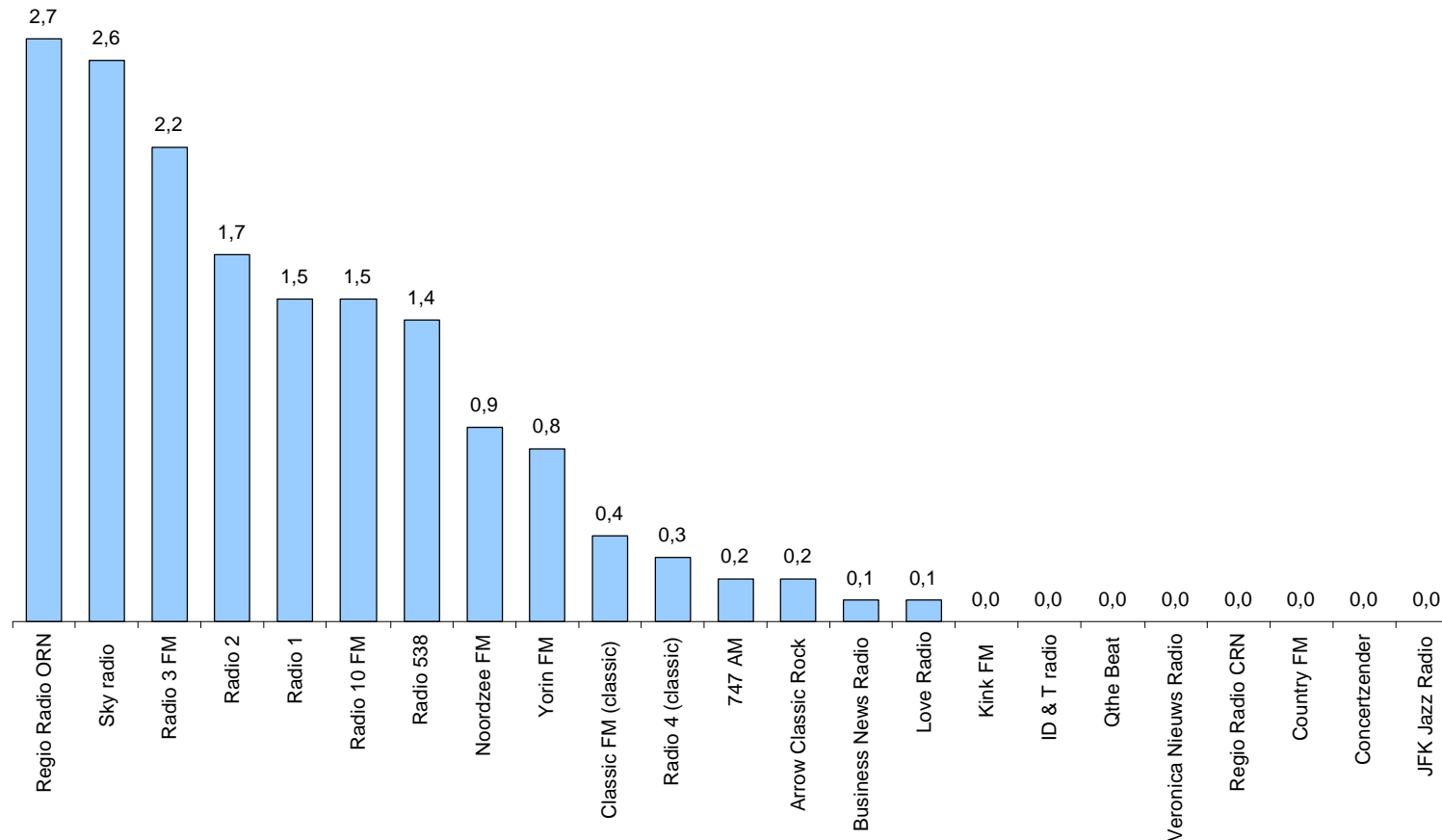
About Audience - 1999

Average Rating (%) - Target : 13+ (All Day)



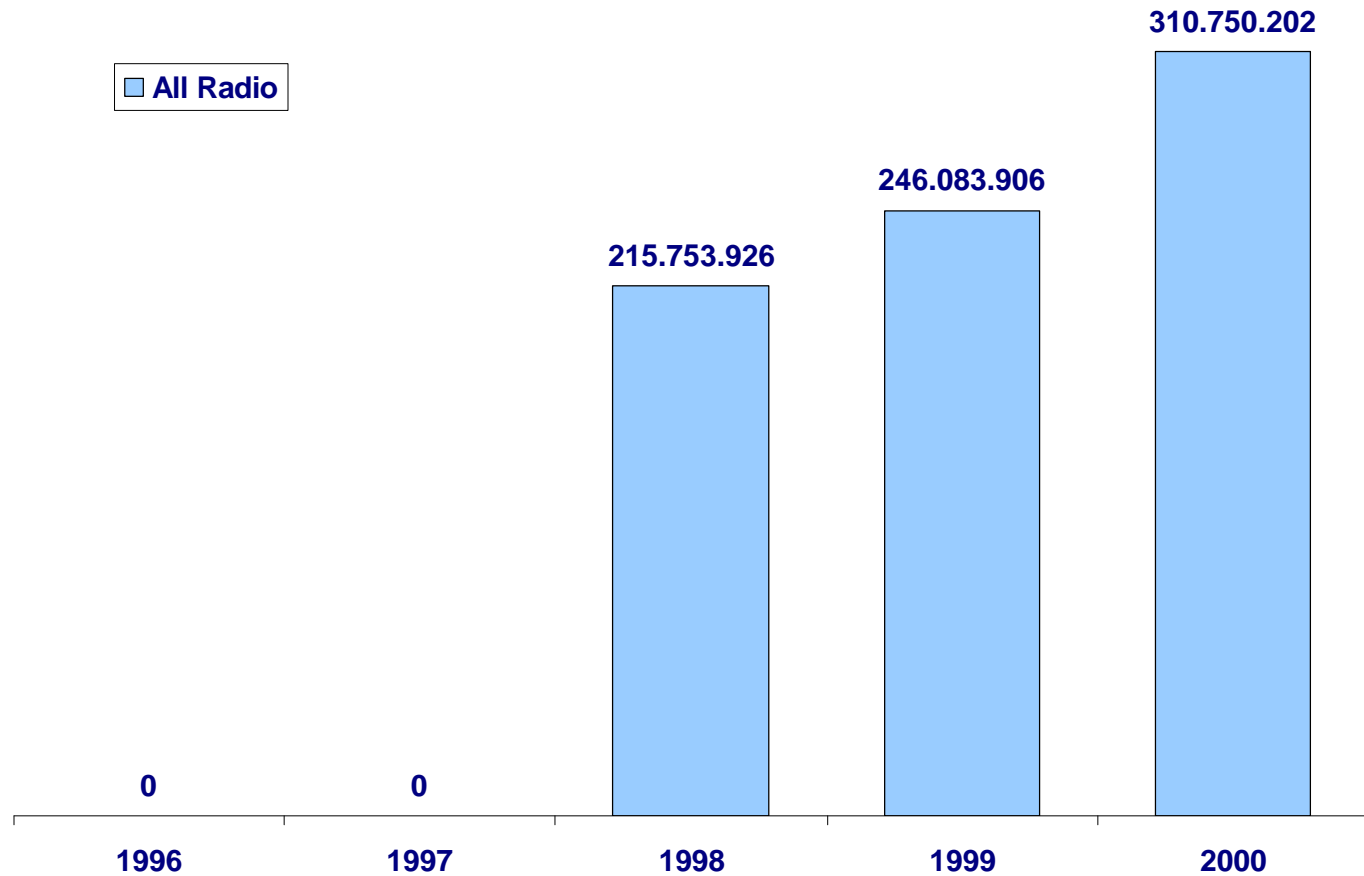
About Audience - 2000

Average Rating (%) - Target : 13+ (All Day)

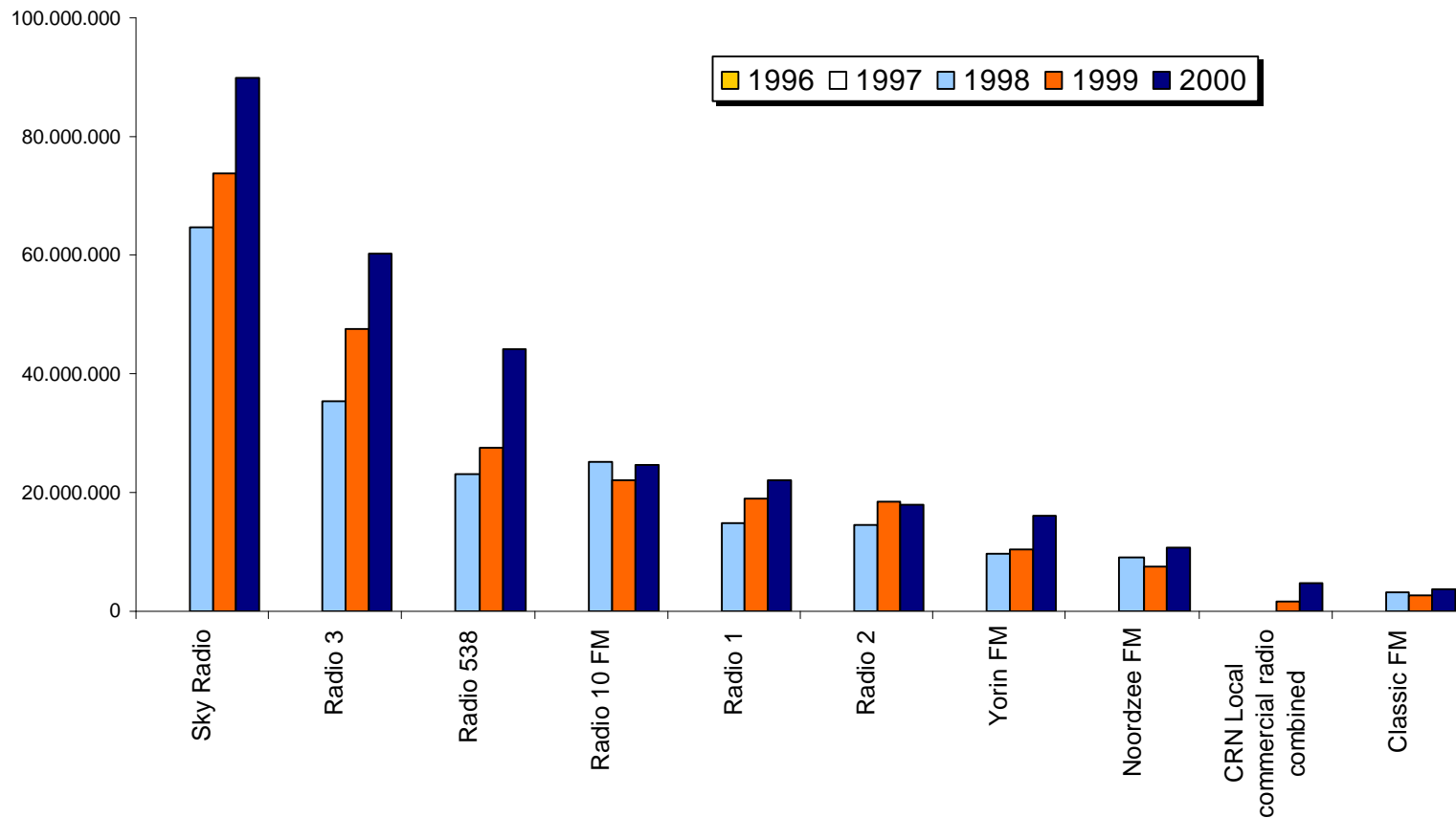


4.6. Media Investment

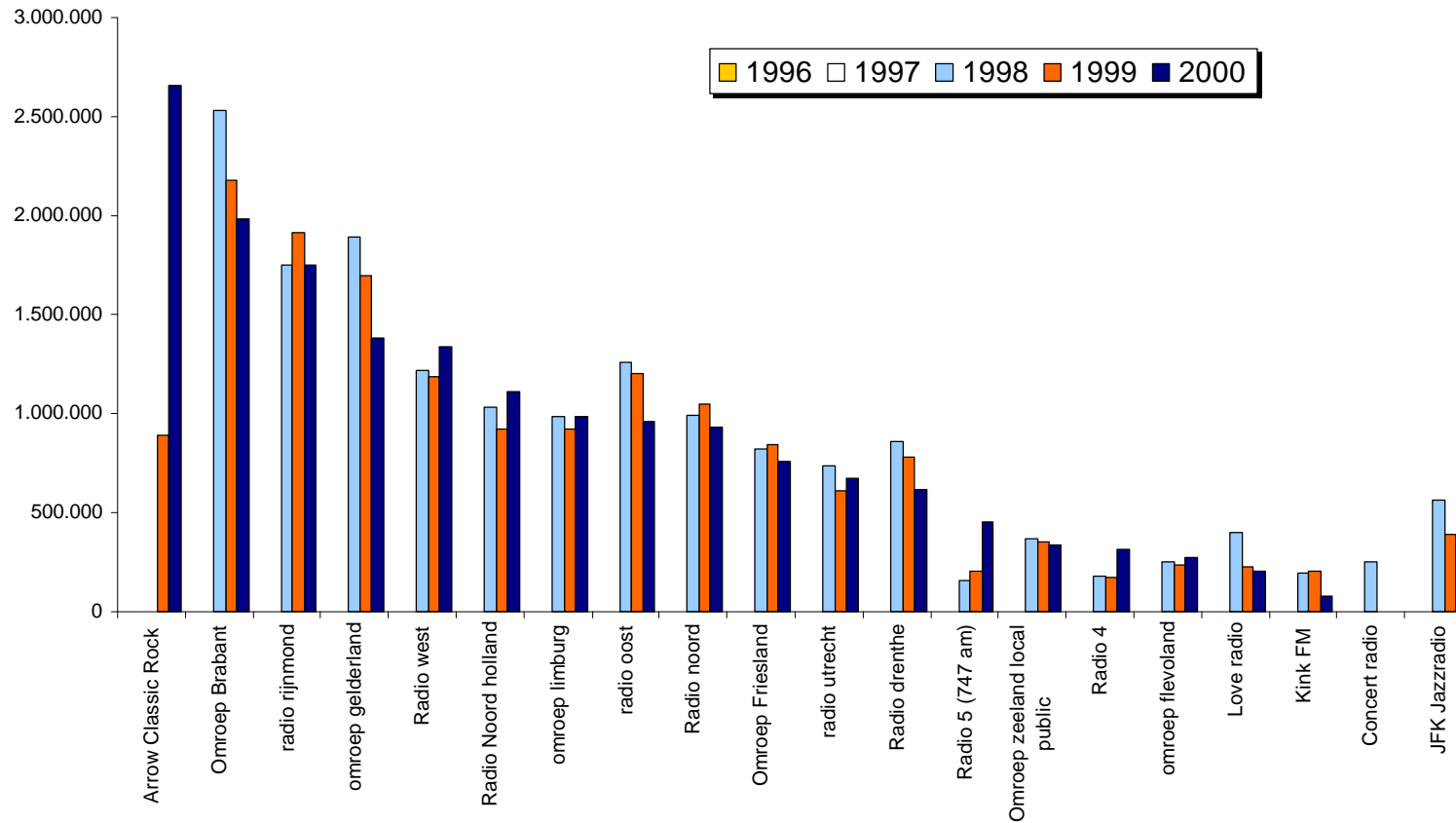
Media Investment Total Radio



Media Investment By Channel

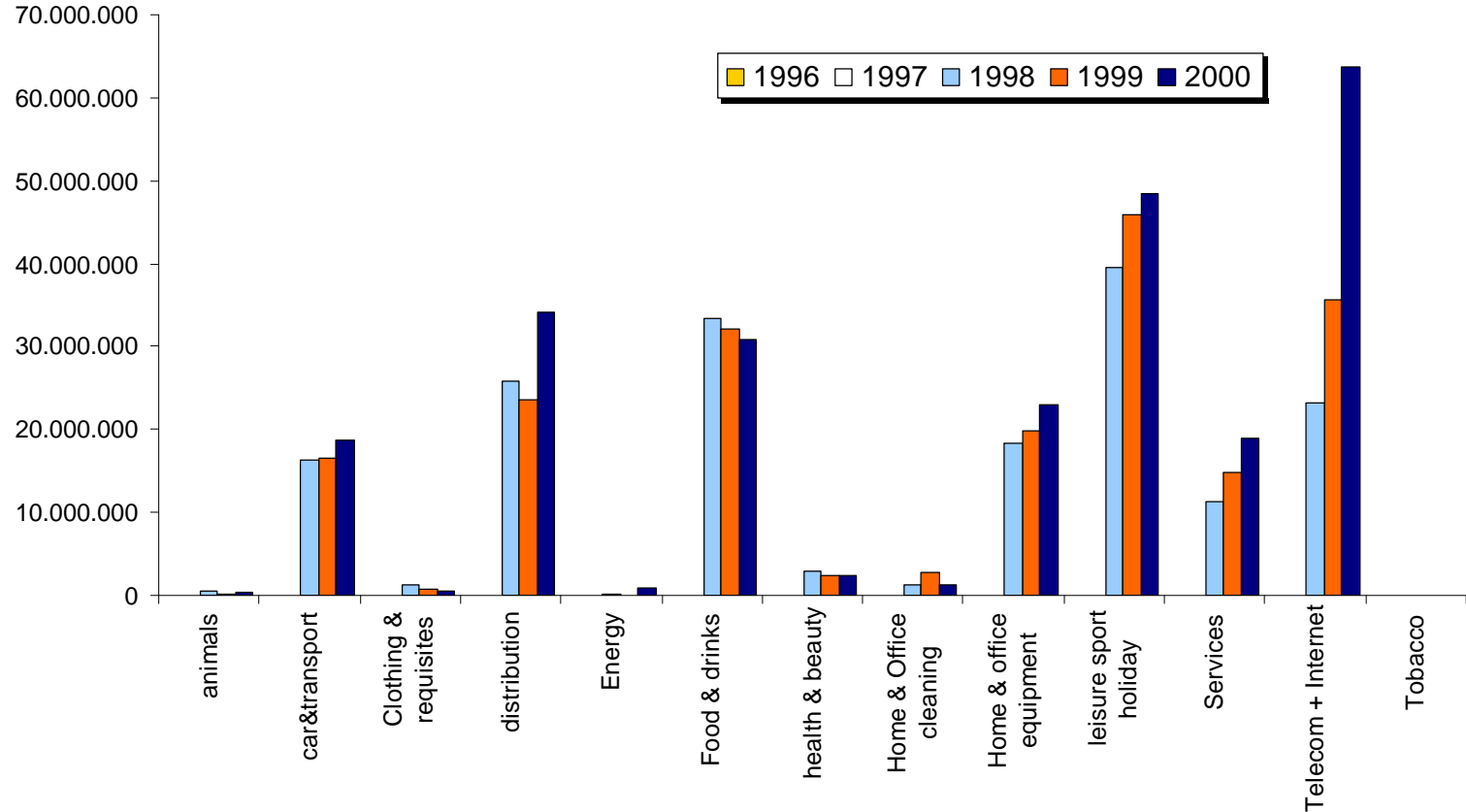


Media Investment By Channel



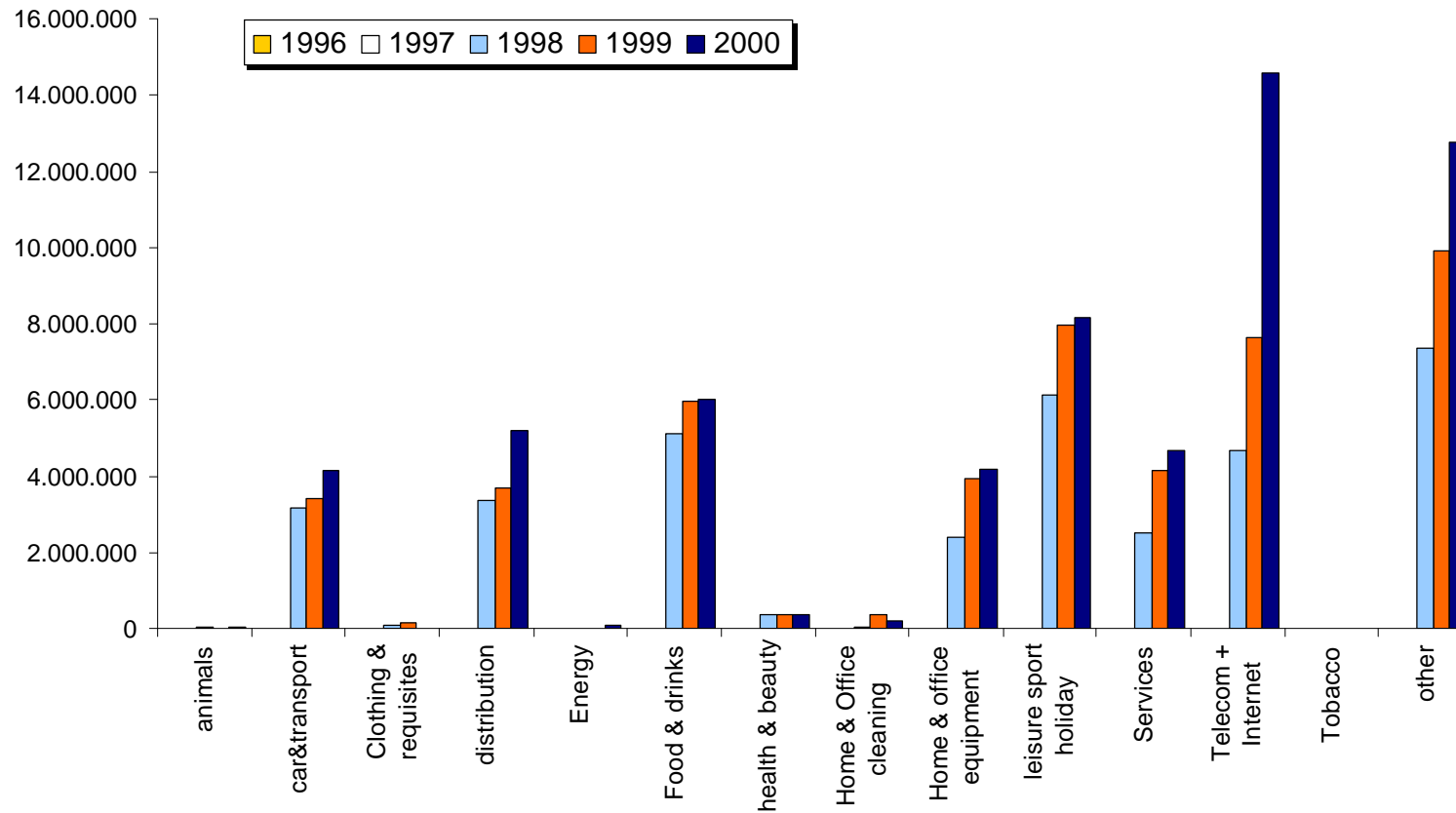
Media Investment

Total Radio by Sector



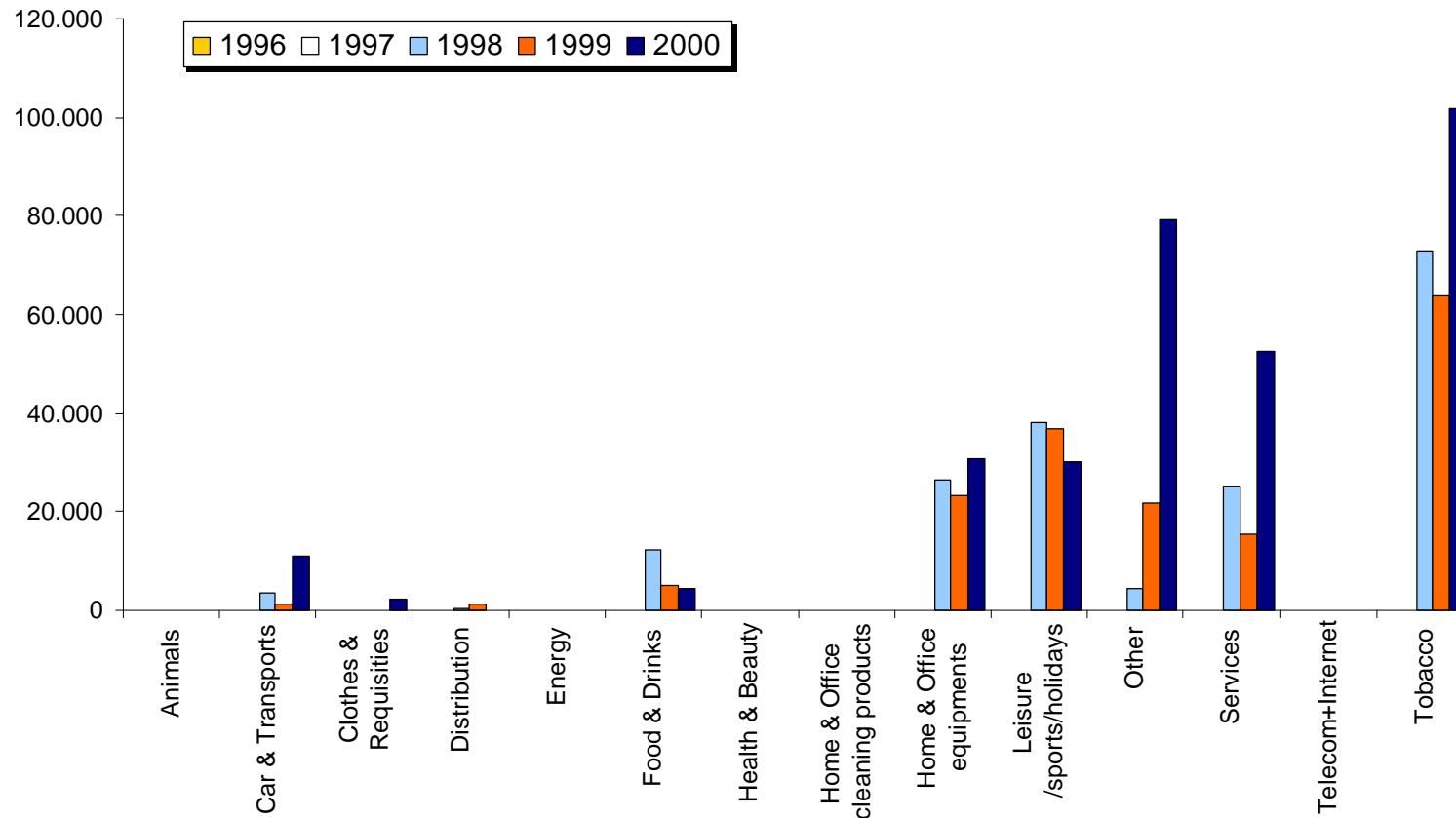
Media Investment

Radio 3



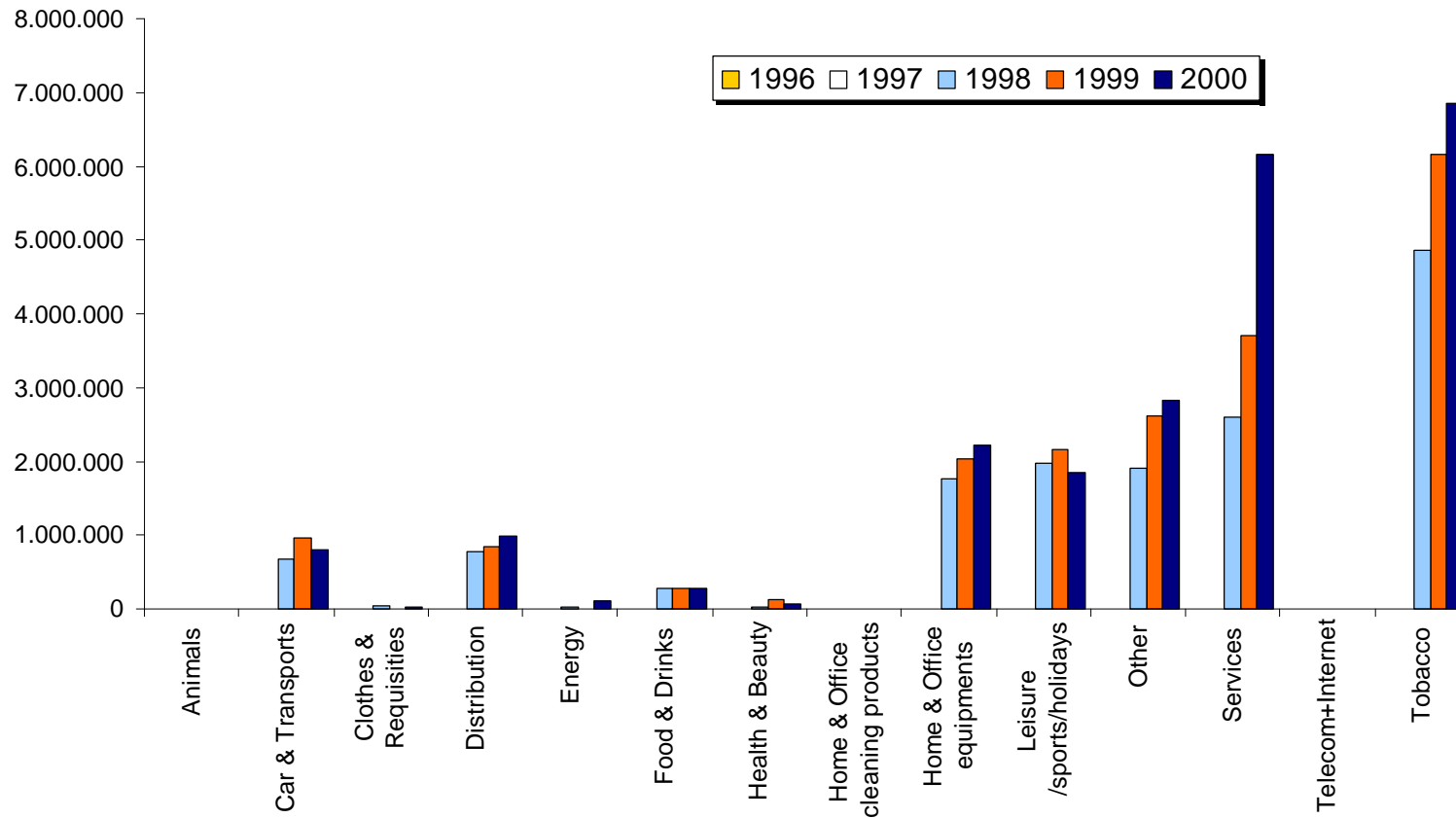
Media Investment

Radio 4



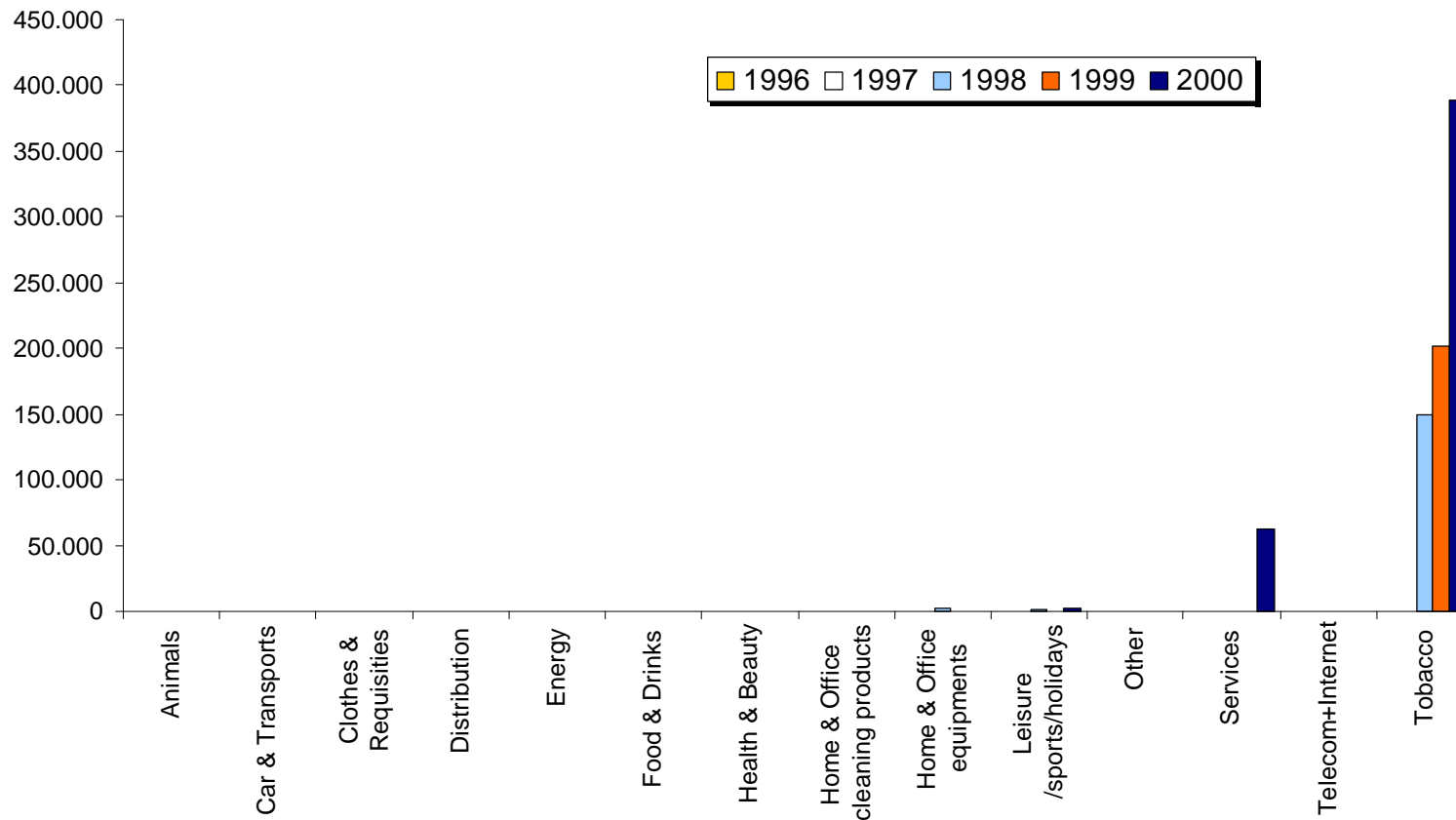
Media Investment

Radio 1



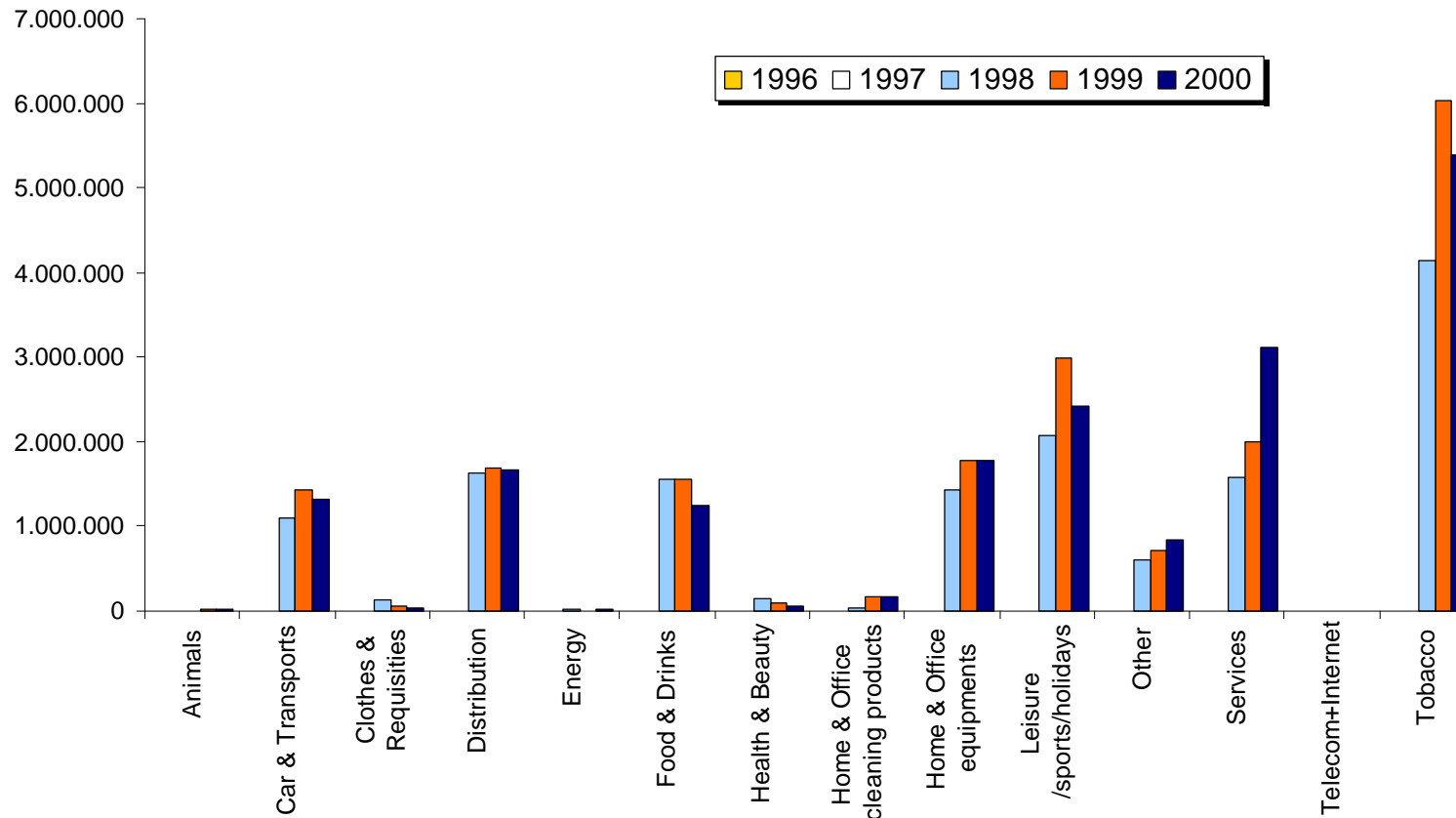
Media Investment

Radio 5 (747 am)



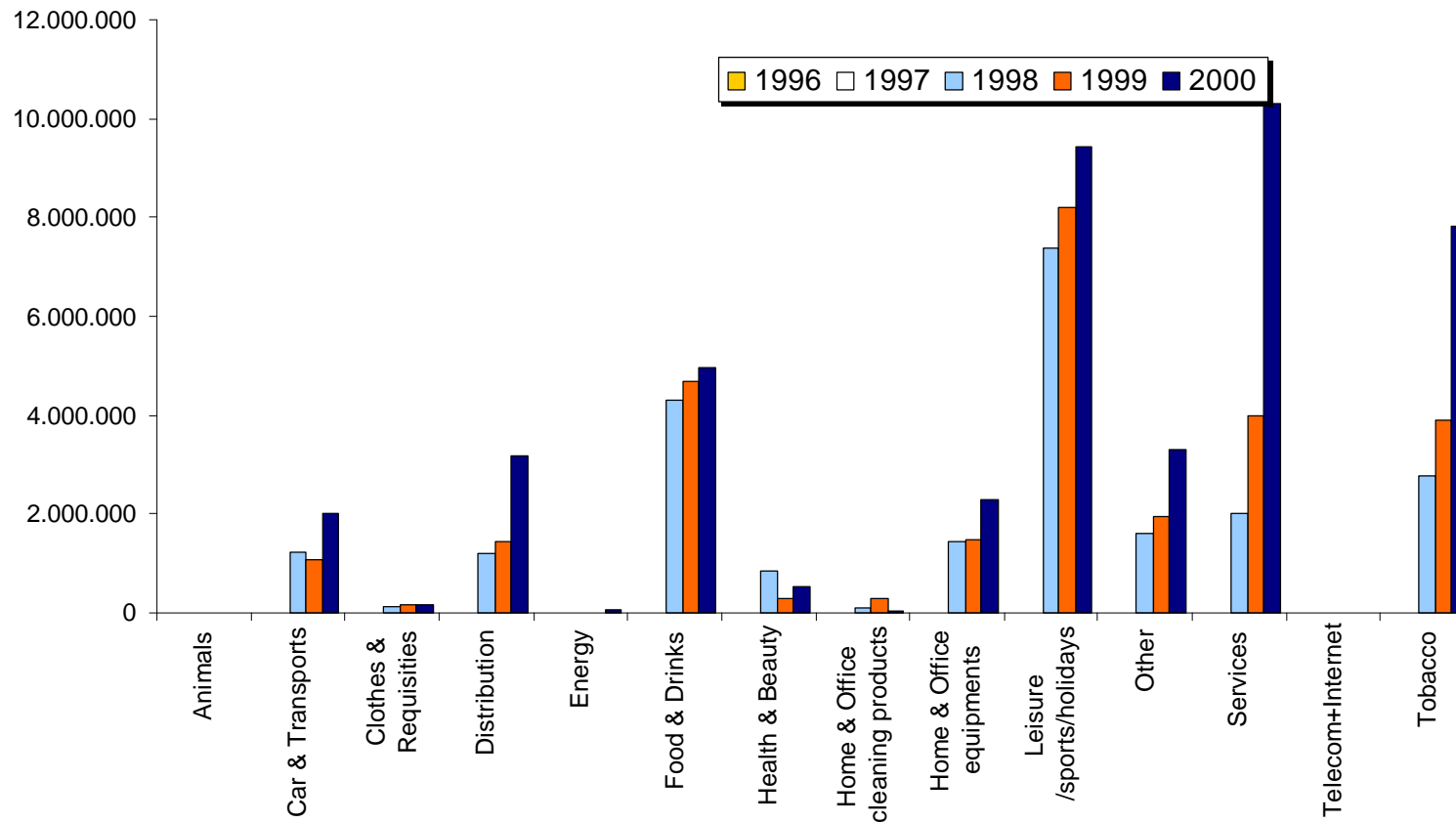
Media Investment

Radio 2



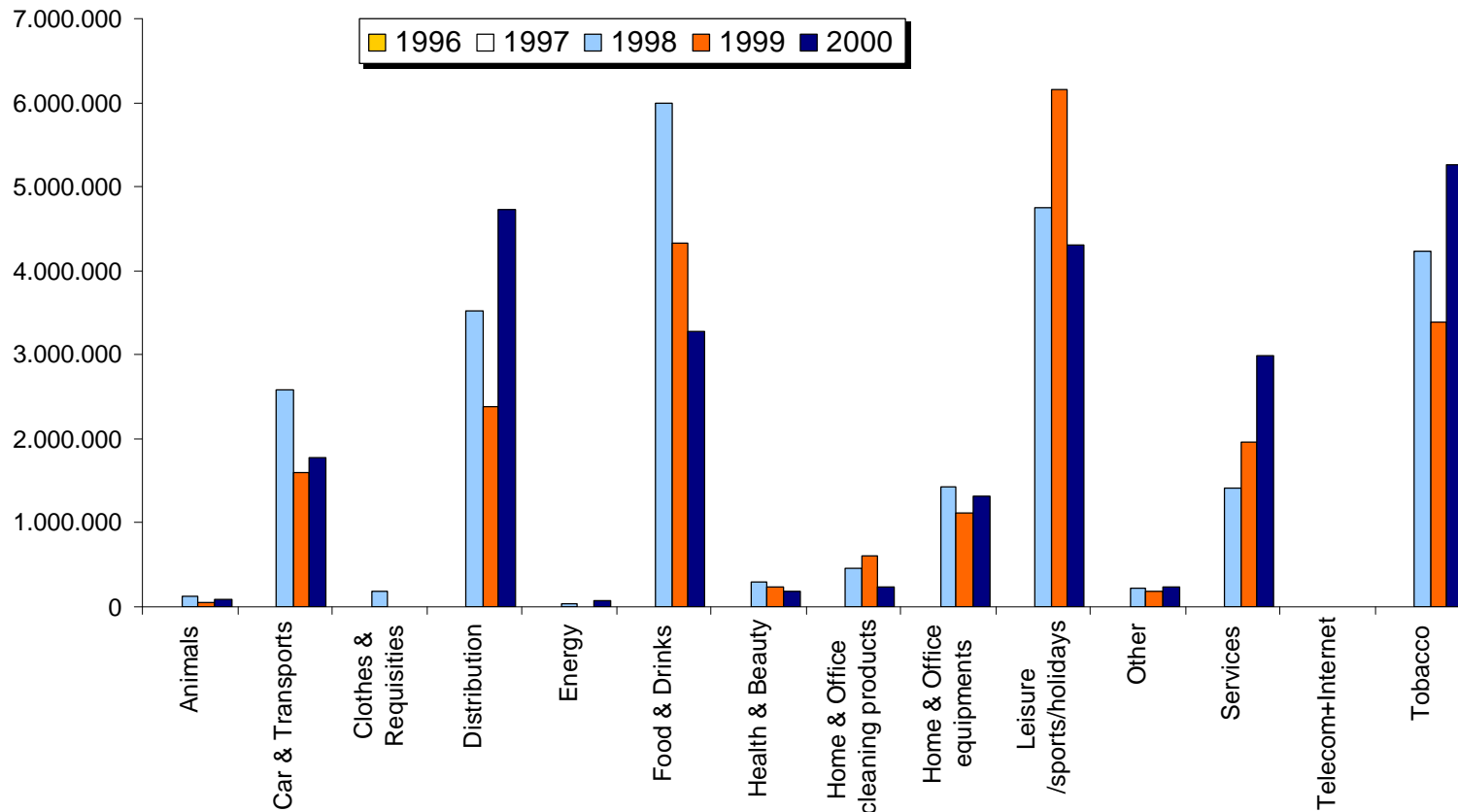
Media Investment

Radio 538

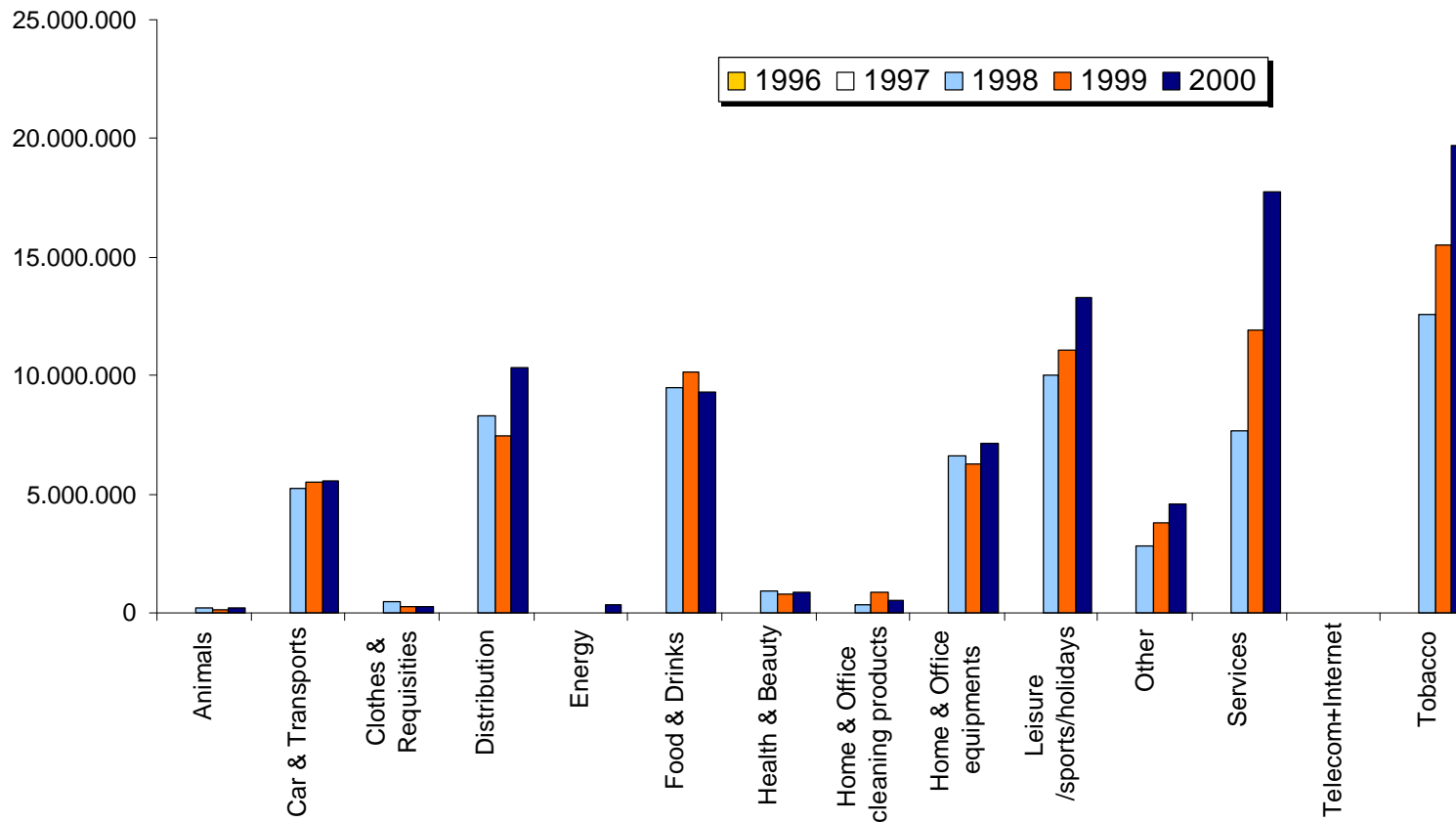


Media Investment

Radio 10 FM

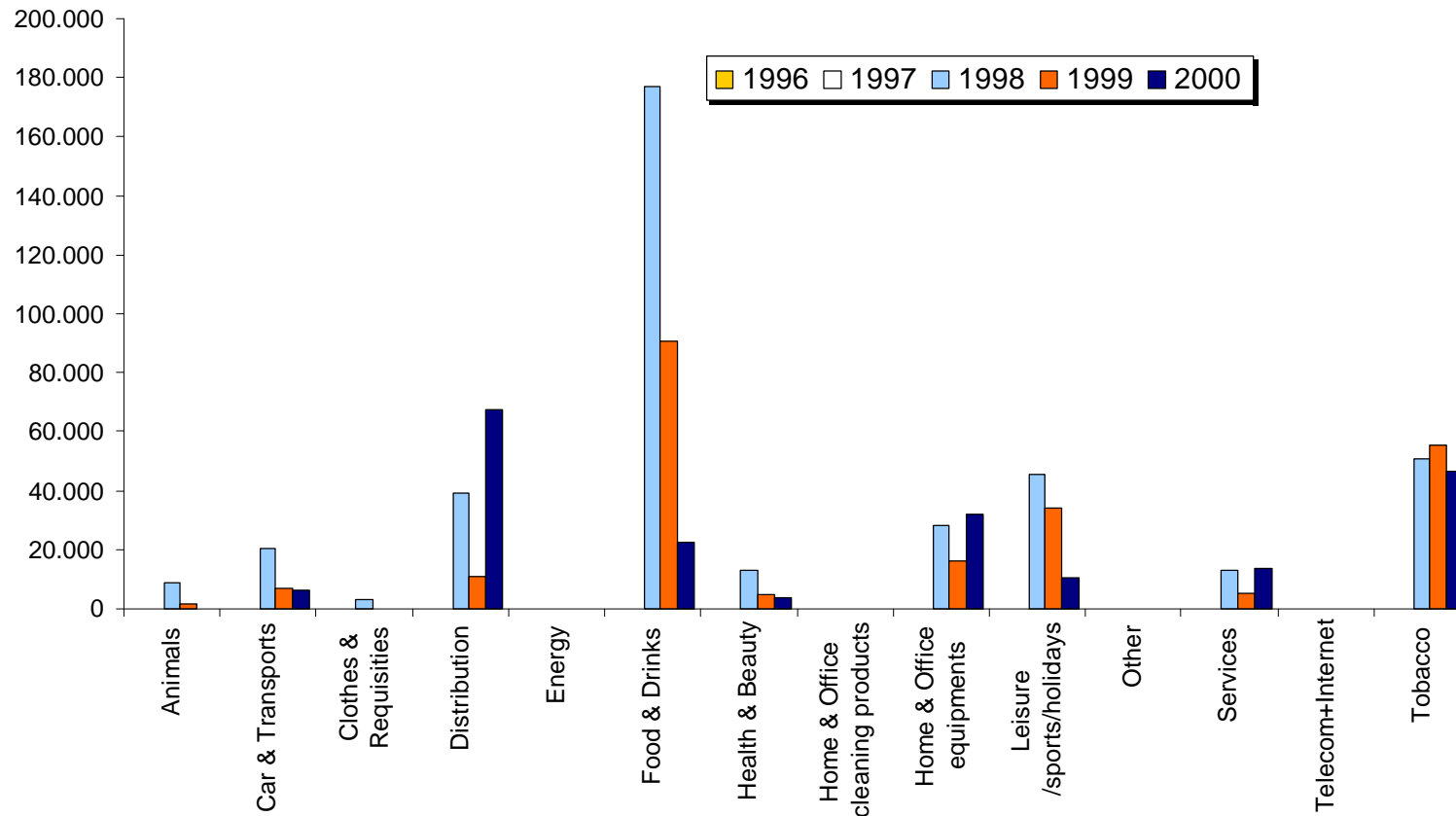


Media Investment Sky Radio



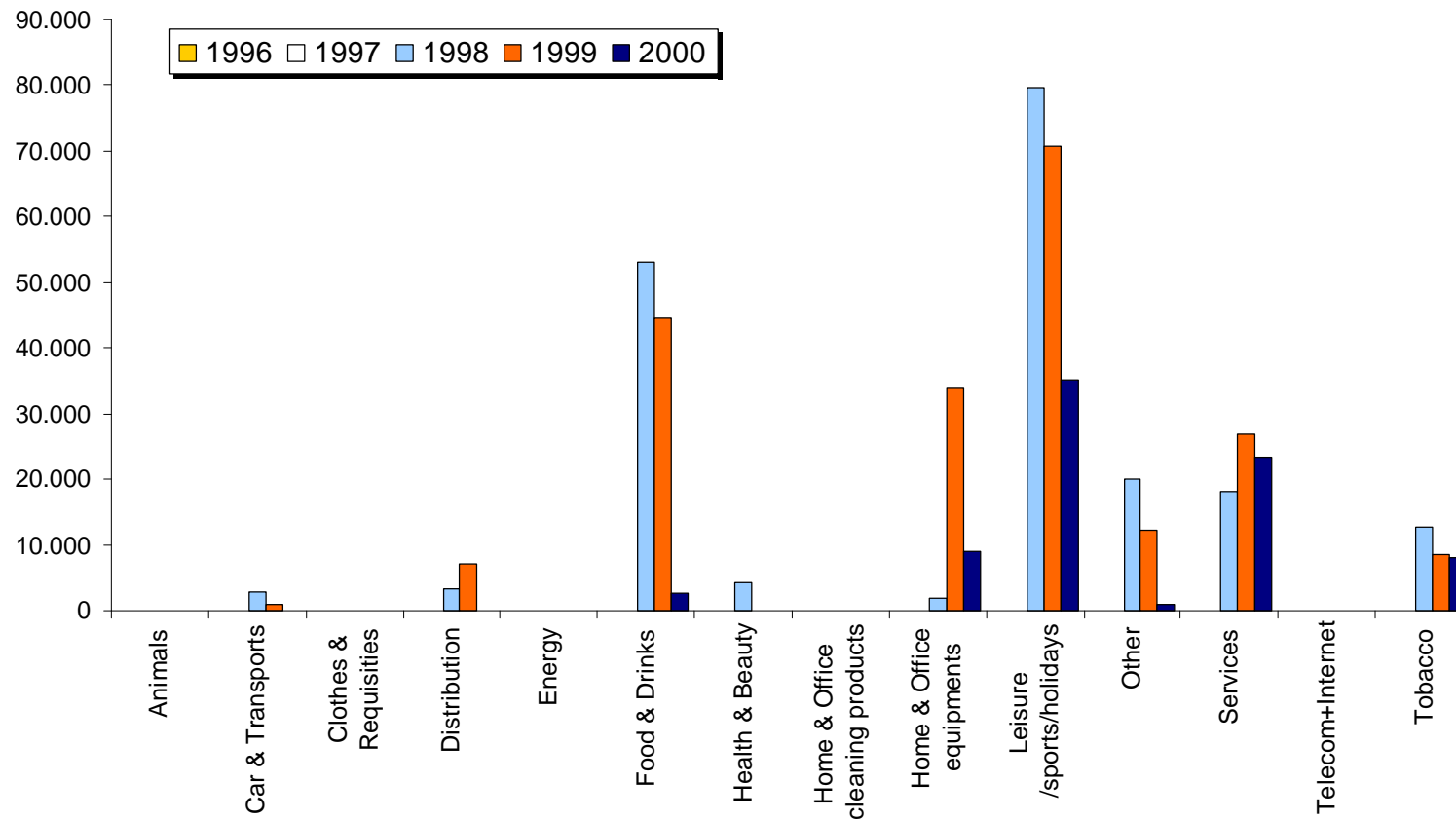
Media Investment

Love Radio



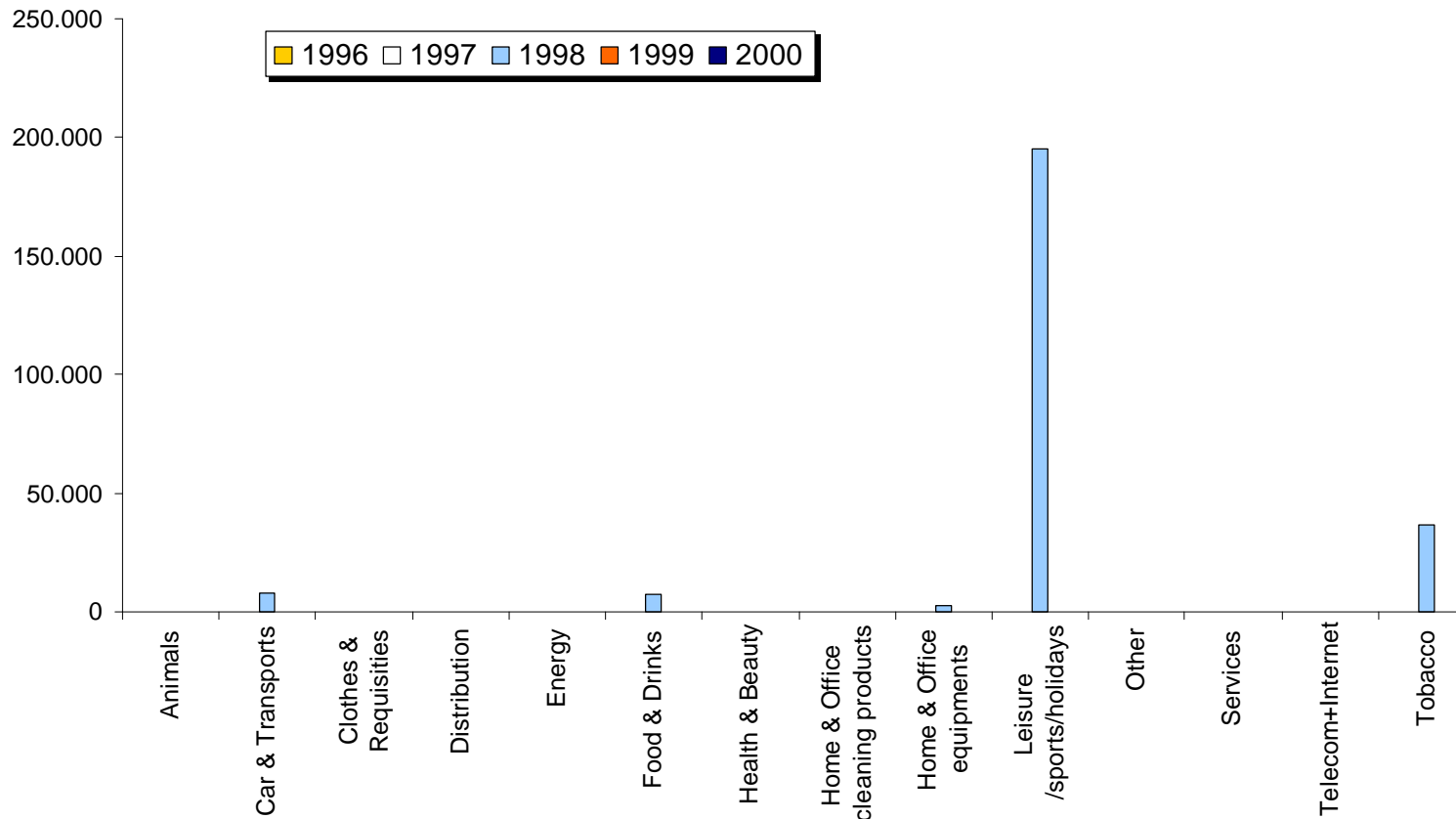
Media Investment

Kink FM



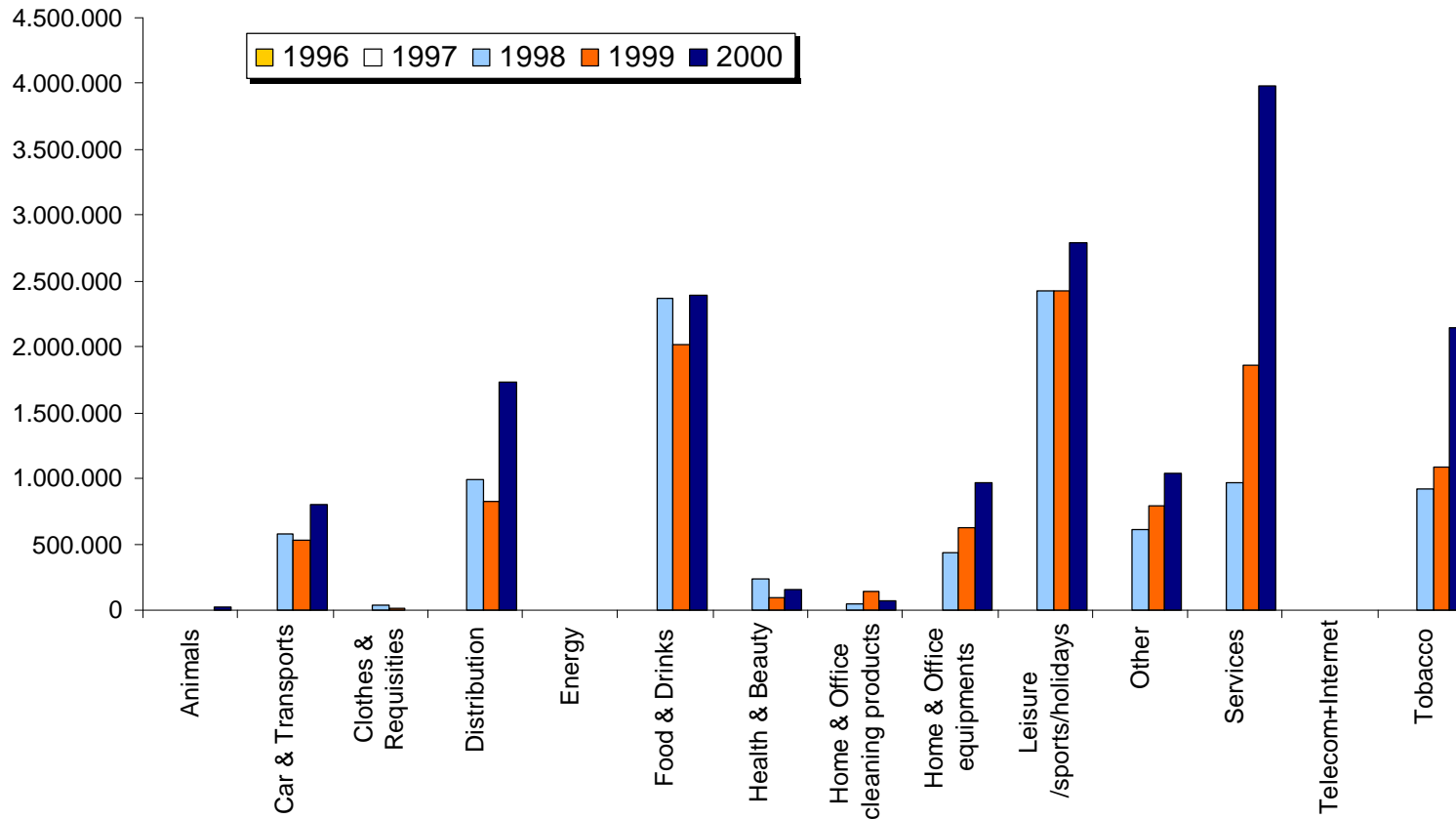
Media Investment

Concert Radio



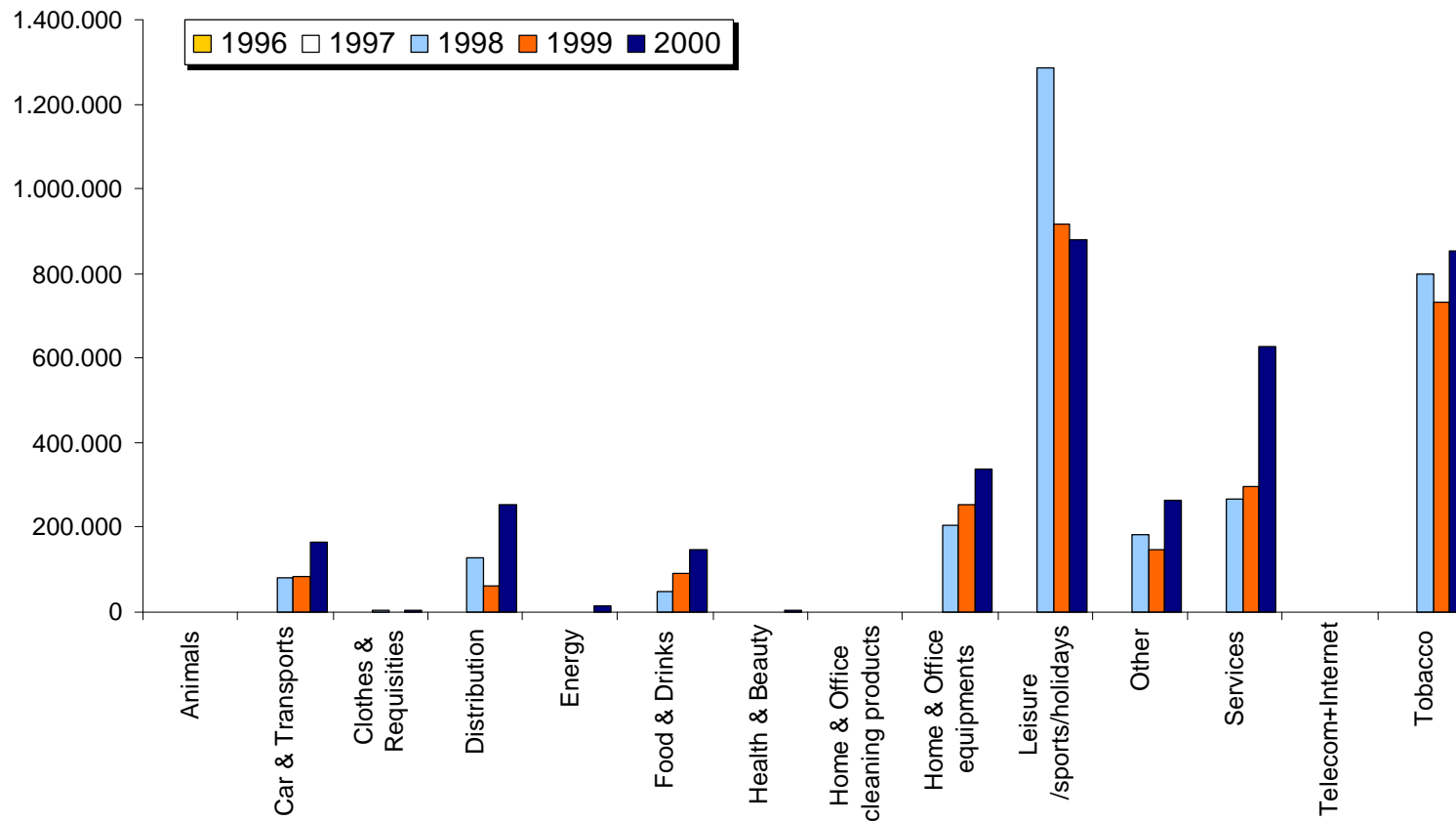
Media Investment

Yorin FM



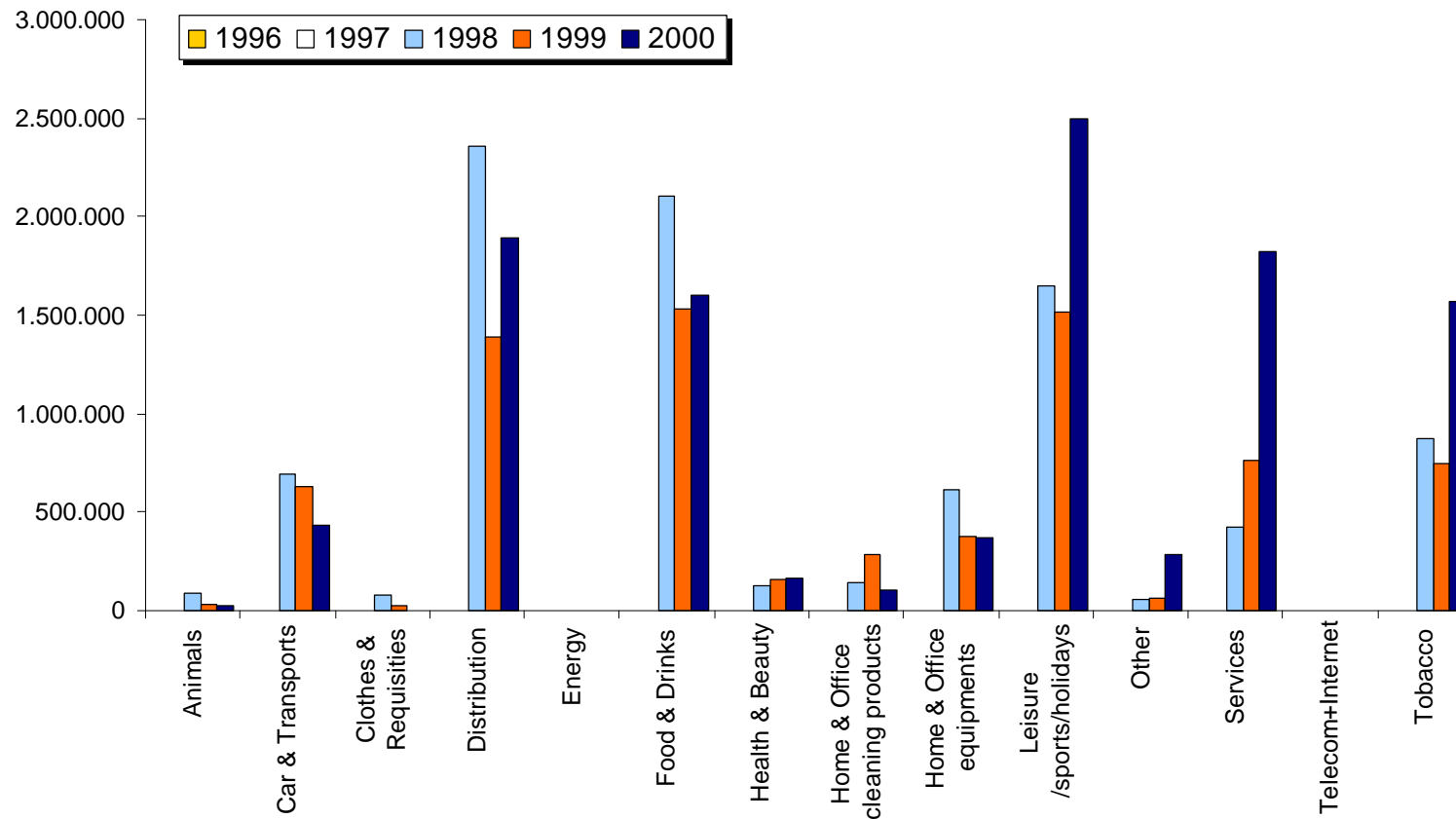
Media Investment

Classic FM



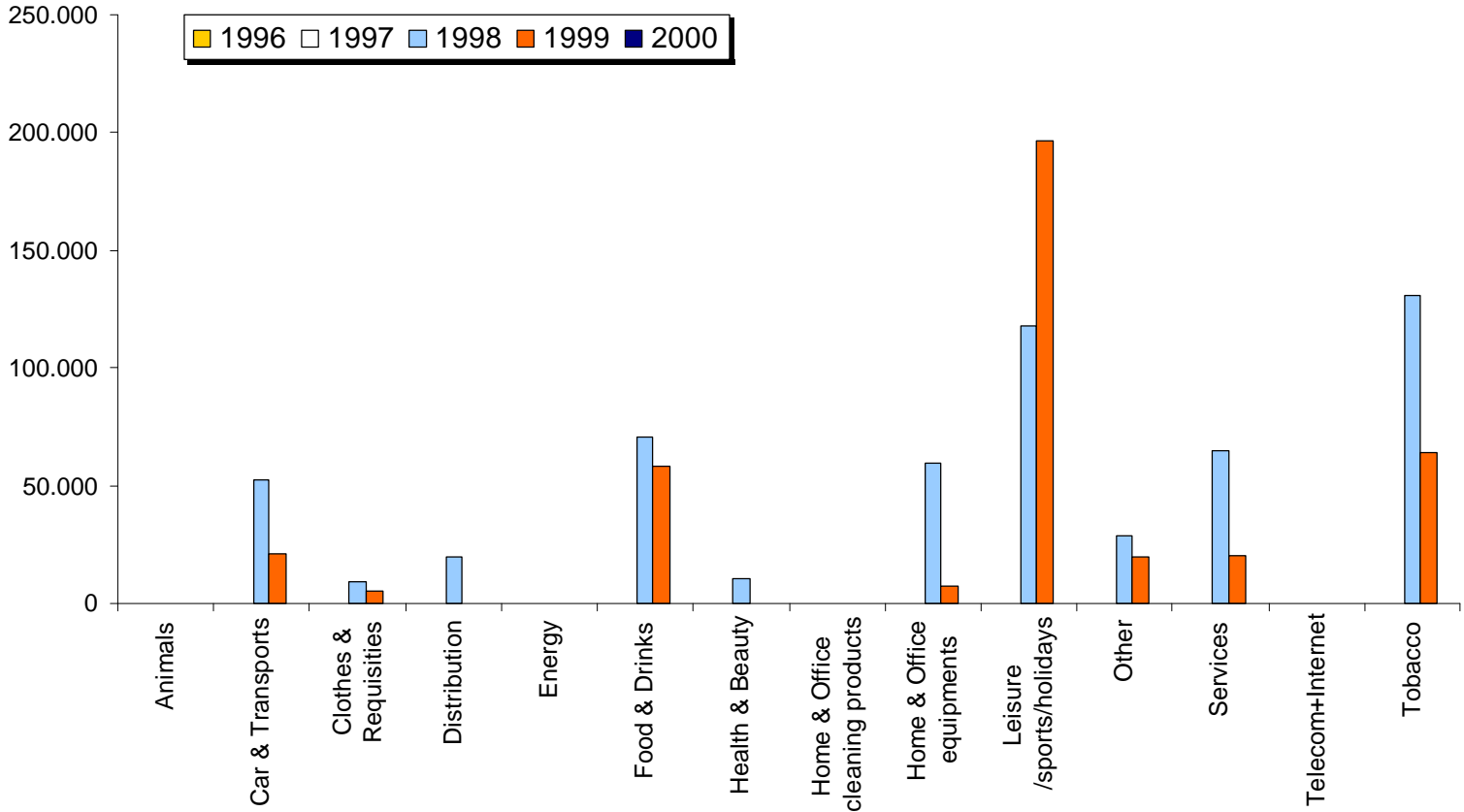
Media Investment

Noordzee FM

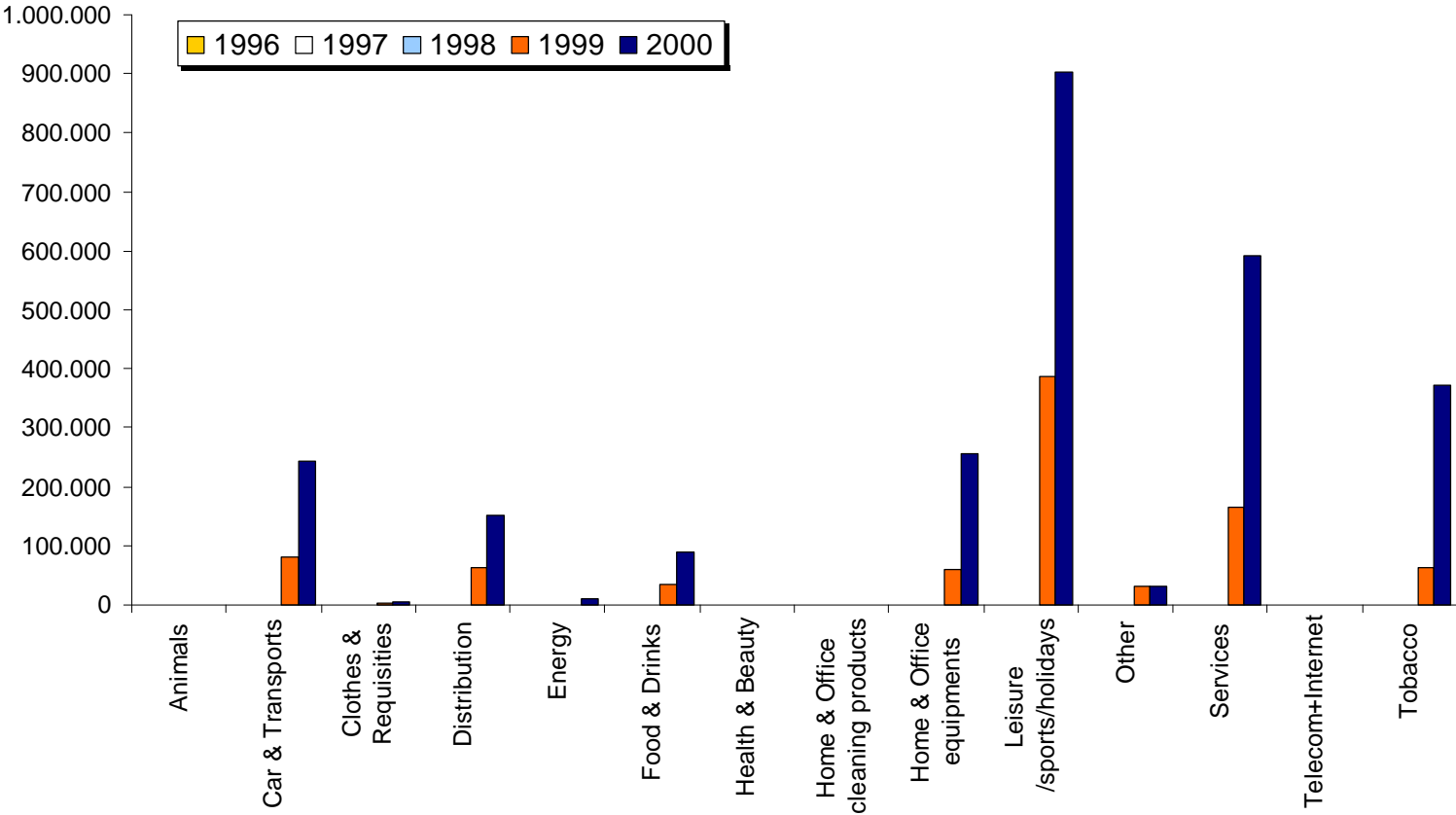


Media Investment

JFK Jazzradio

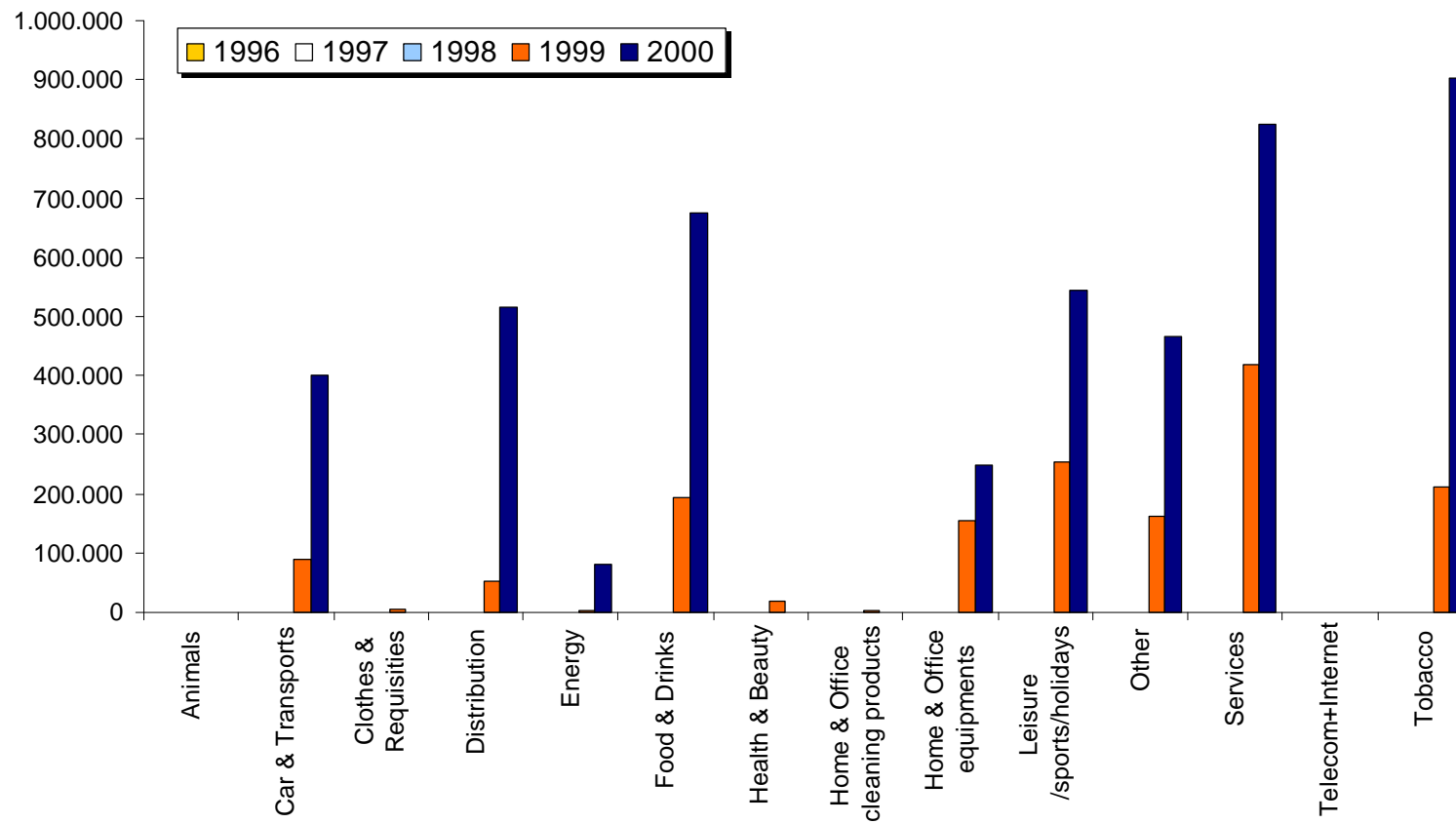


Media Investment Arrow Classic Rock



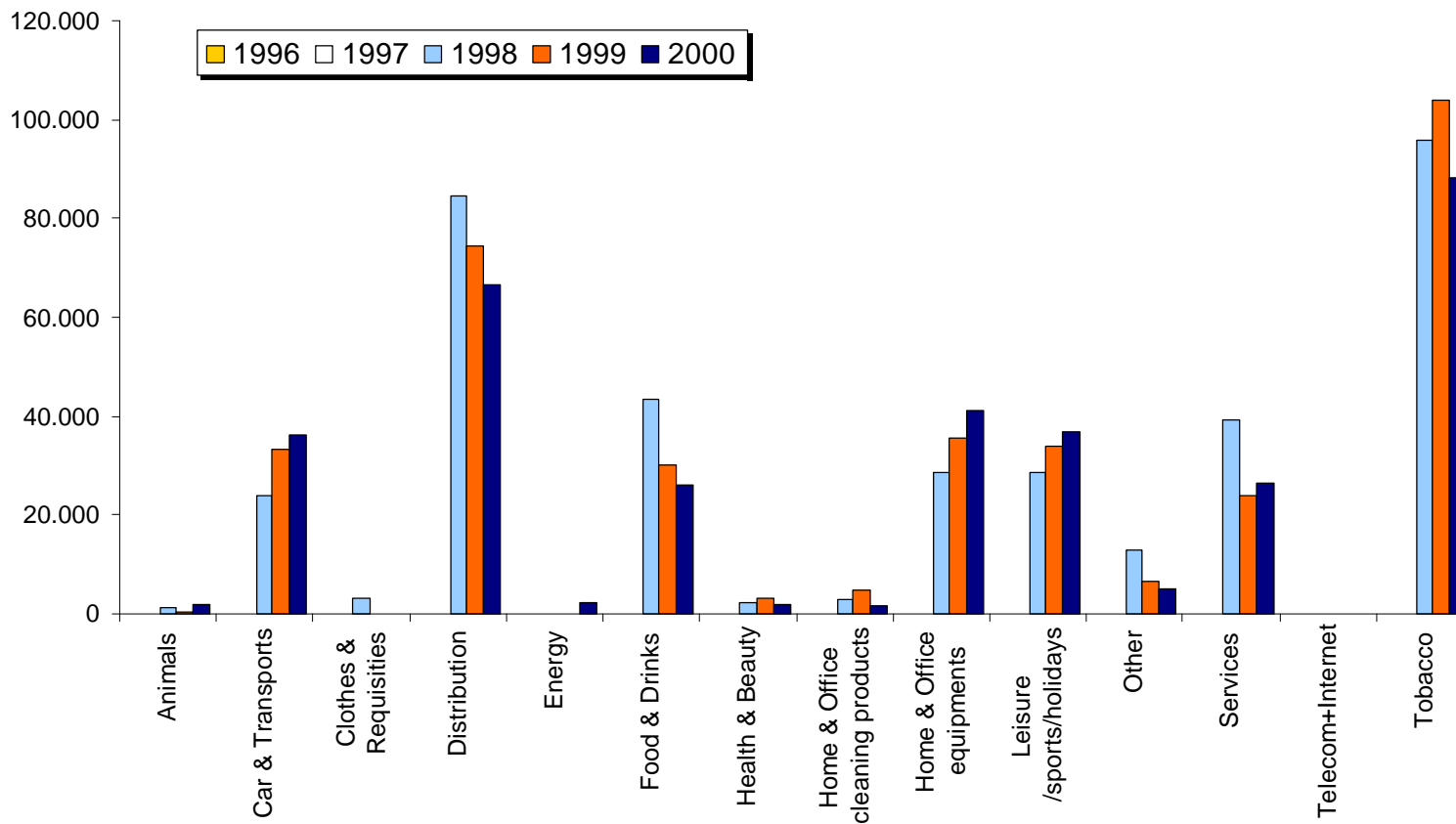
Media Investment

CRN Local commercial radio combined

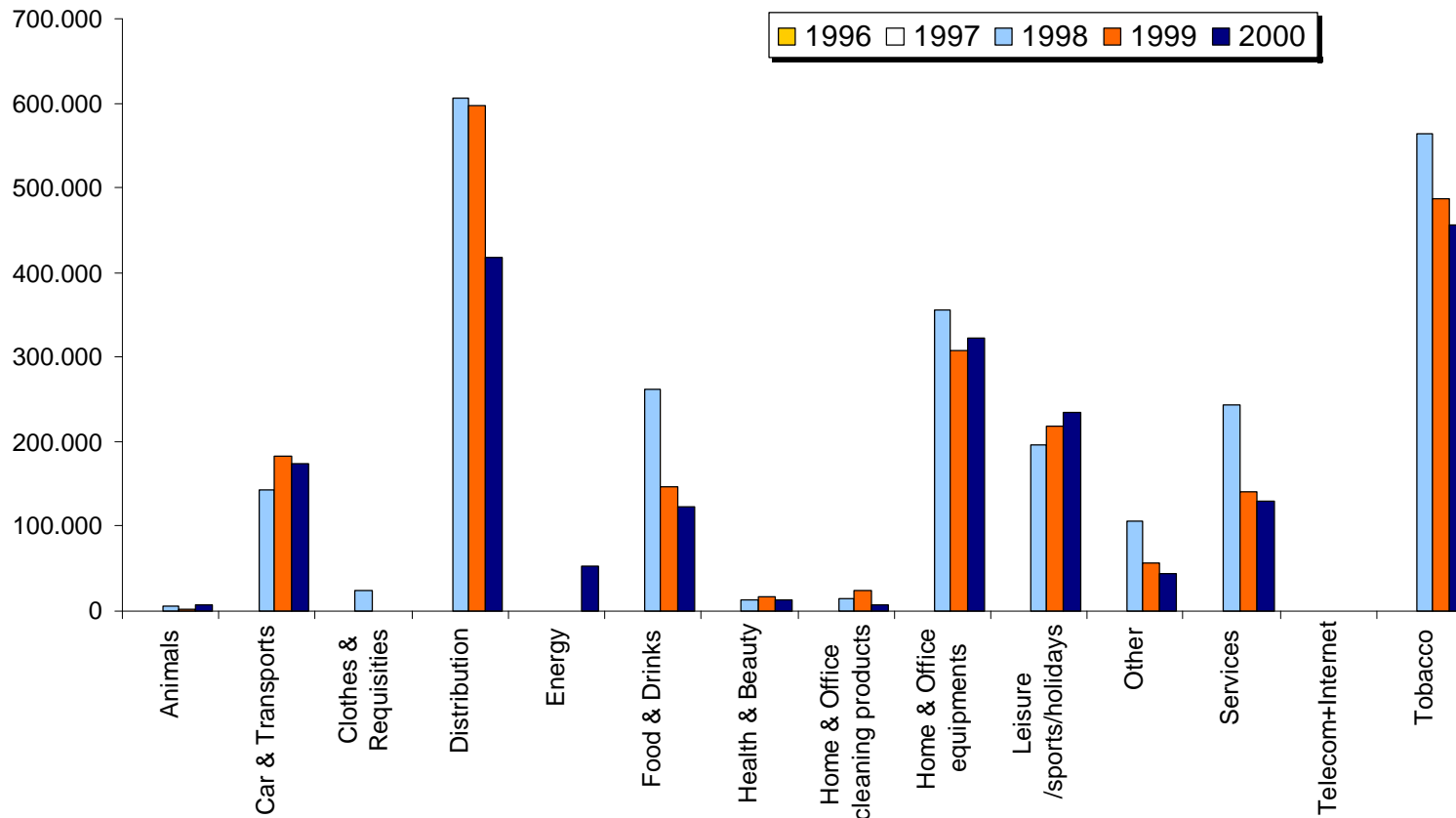


Media Investment

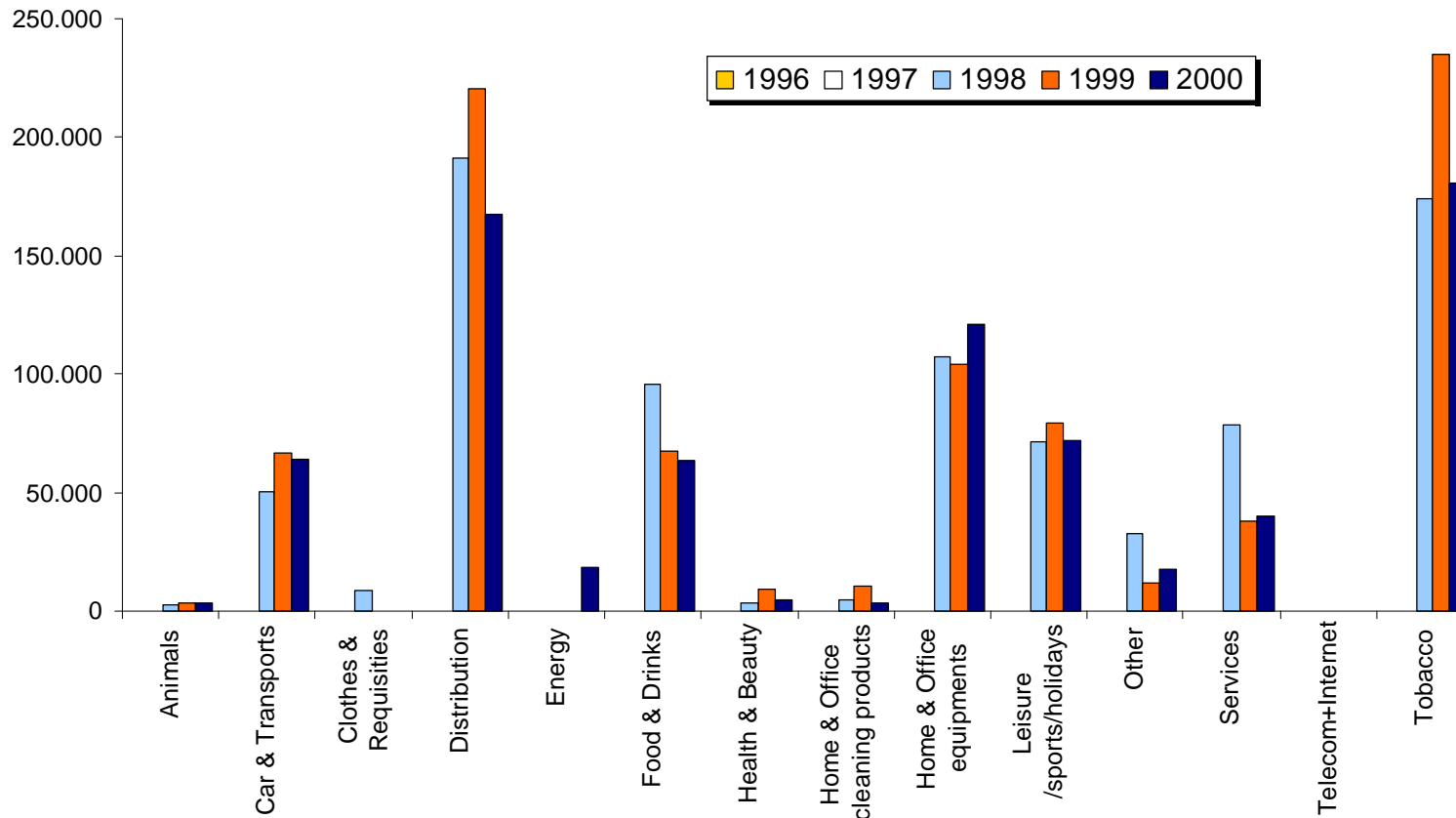
Omroep zeeland local public



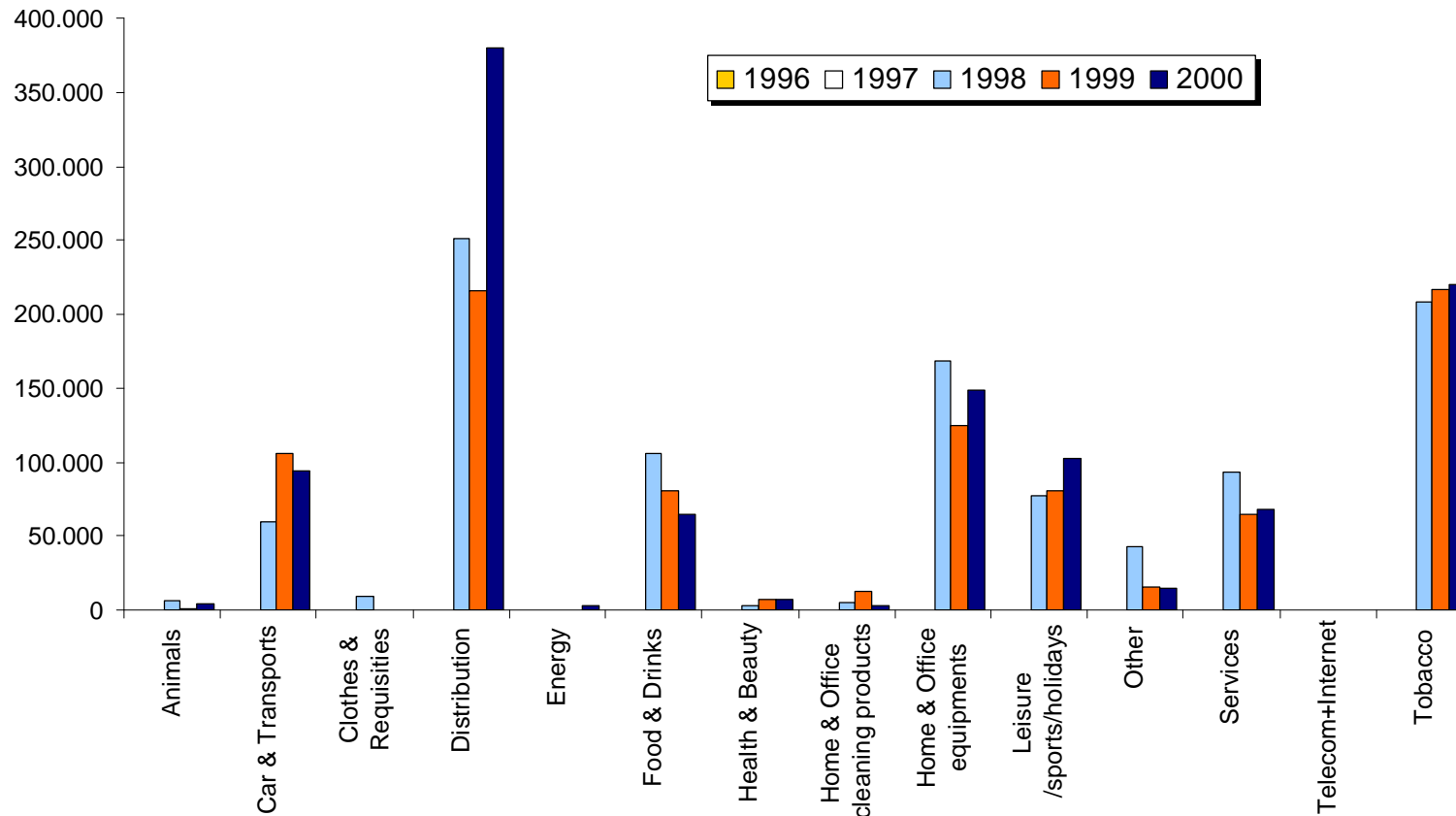
Media Investment Omroep Brabant



Media Investment Omroep Friesland

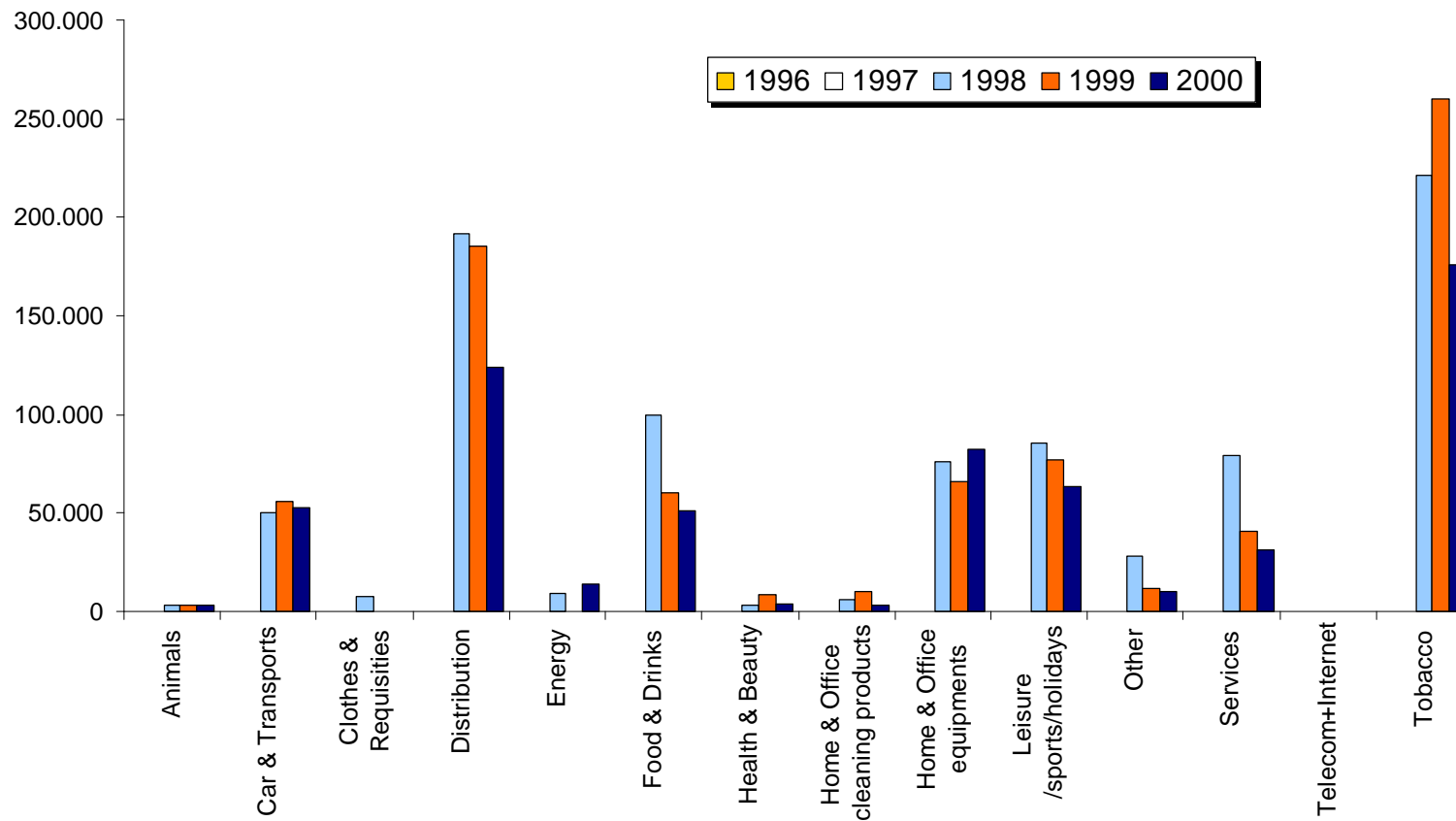


Media Investment Radio Noord Holland

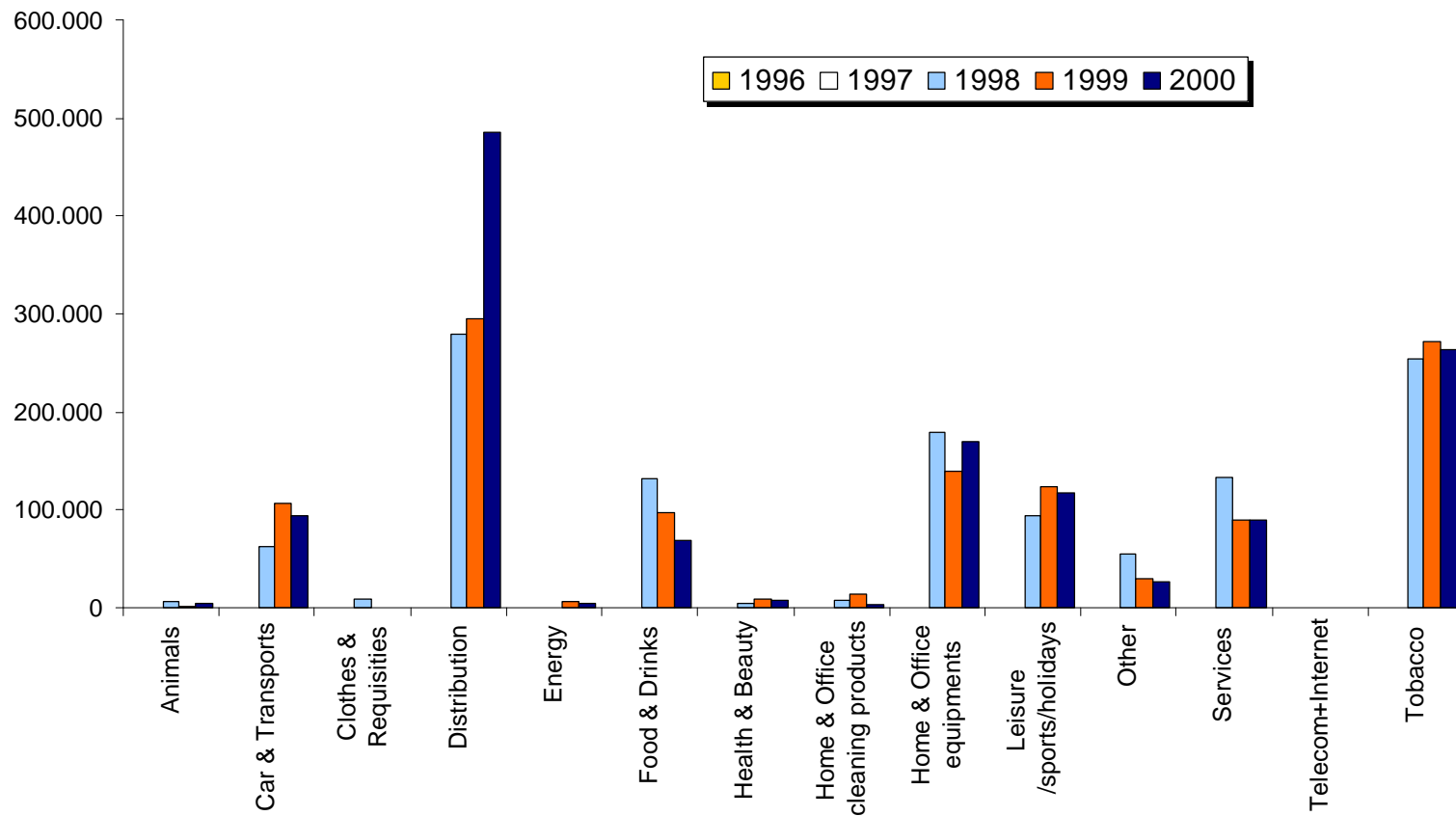


Media Investment

Radio Drenthe

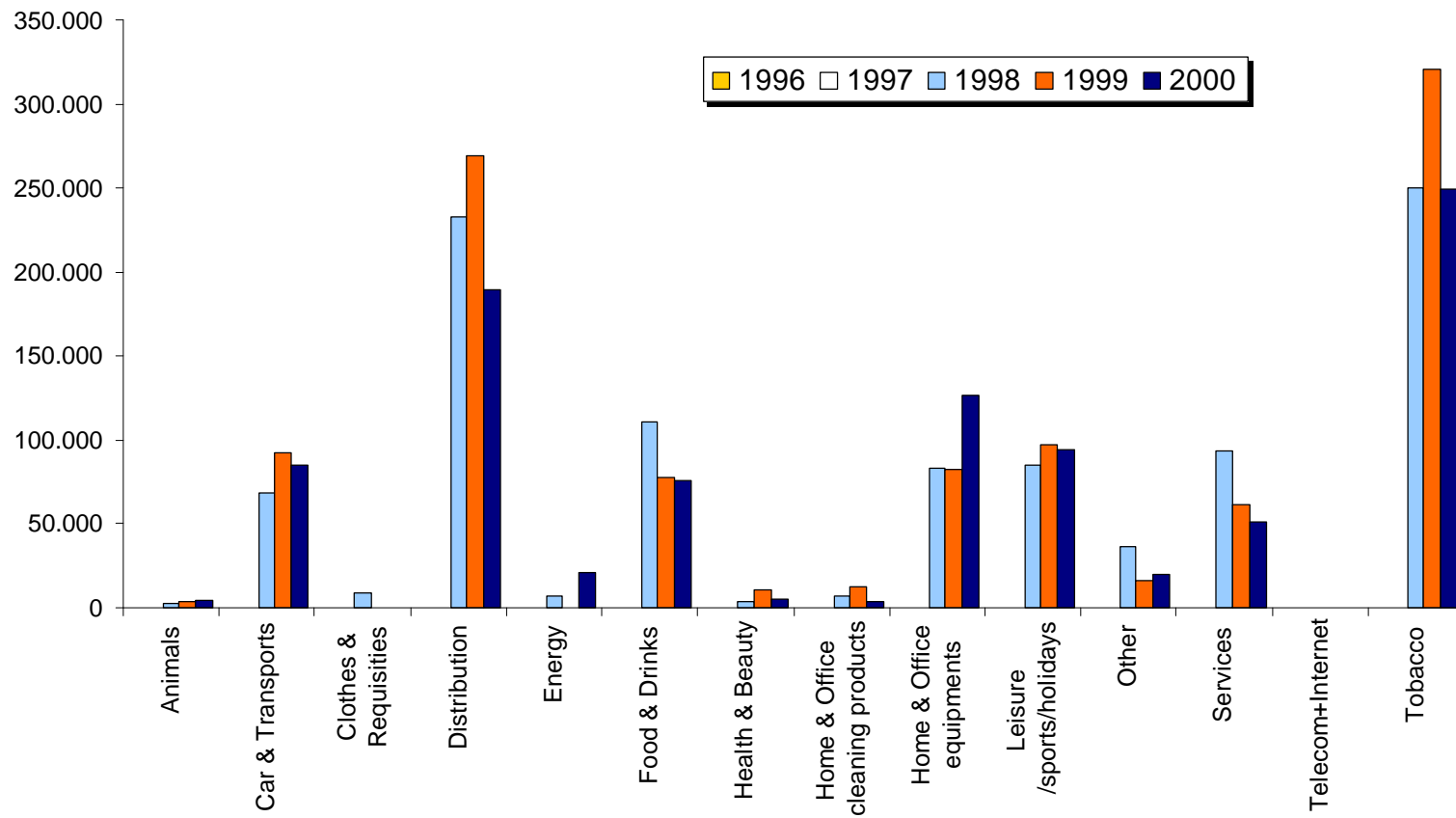


Media Investment Radio West



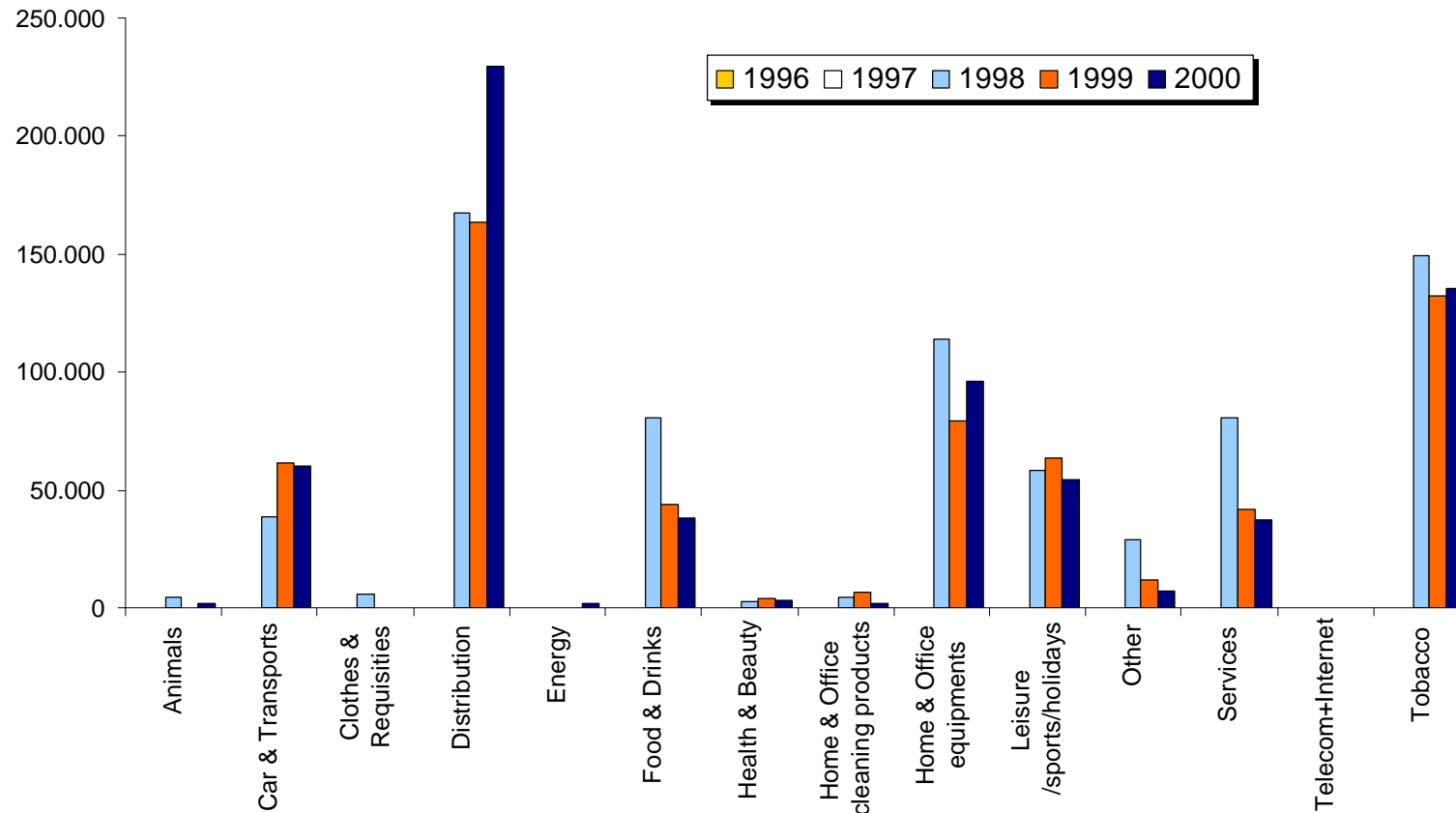
Media Investment

Radio Noord

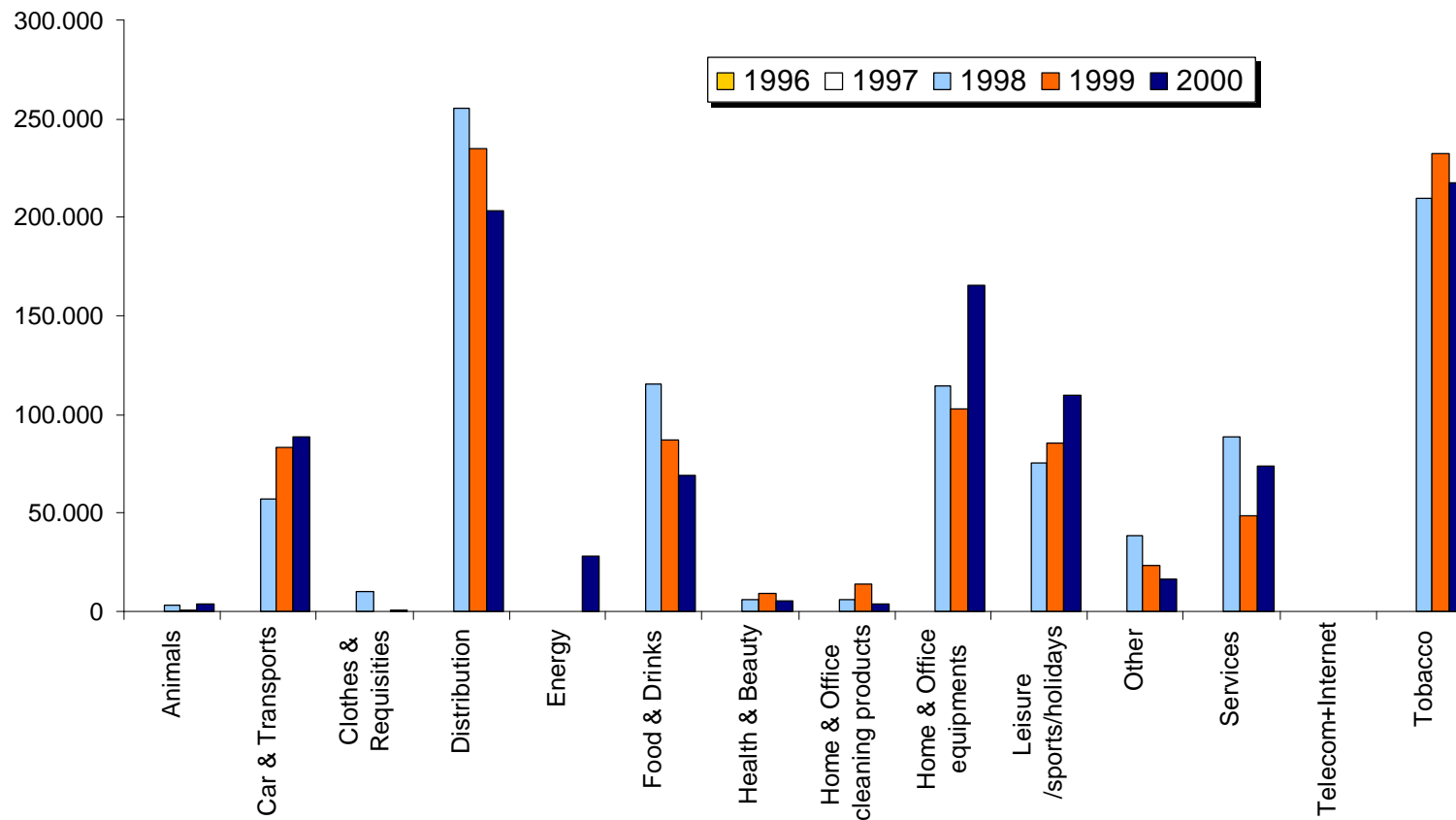


Media Investment

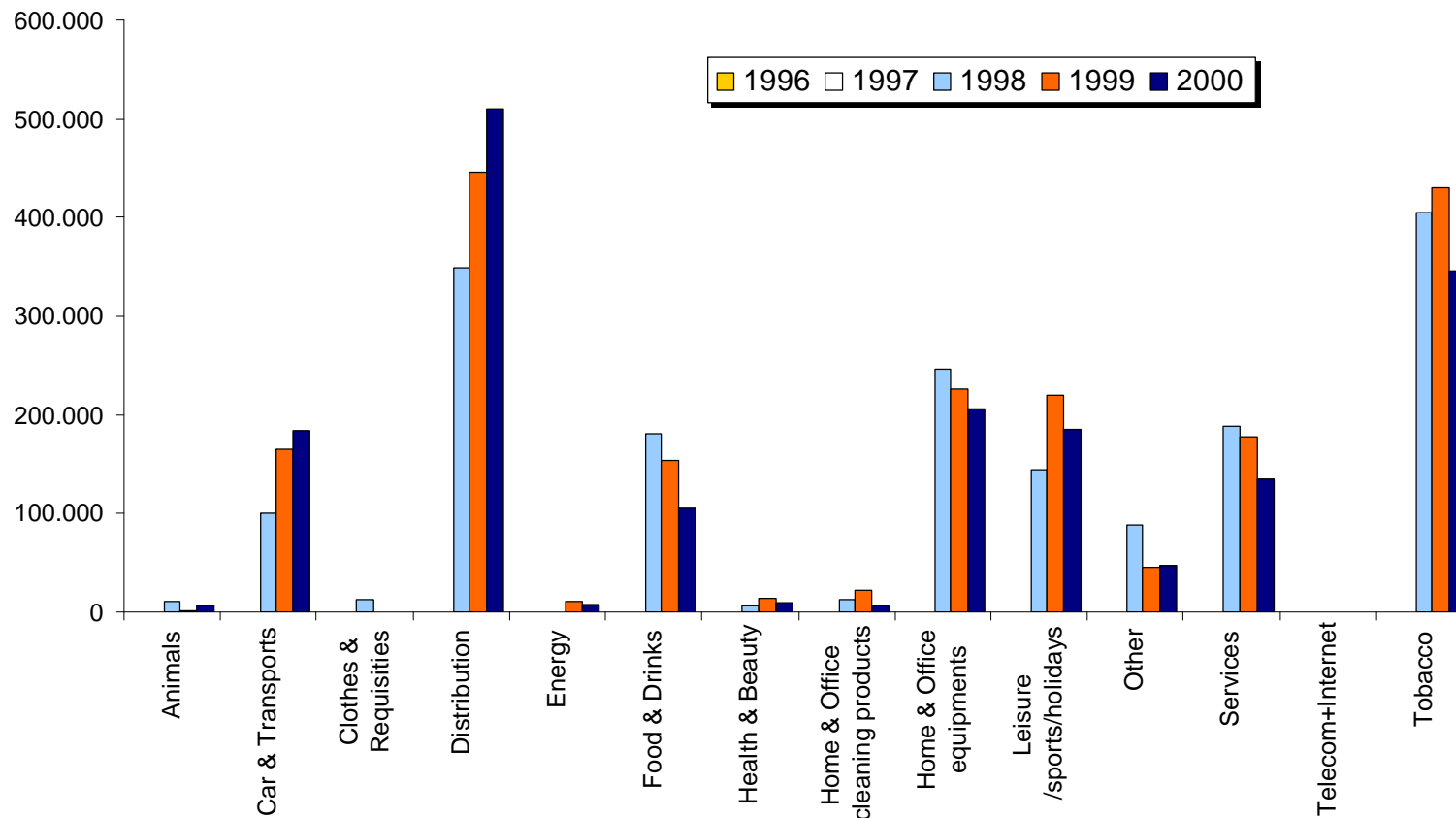
Radio Utrecht



Media Investment Omroep Limburg

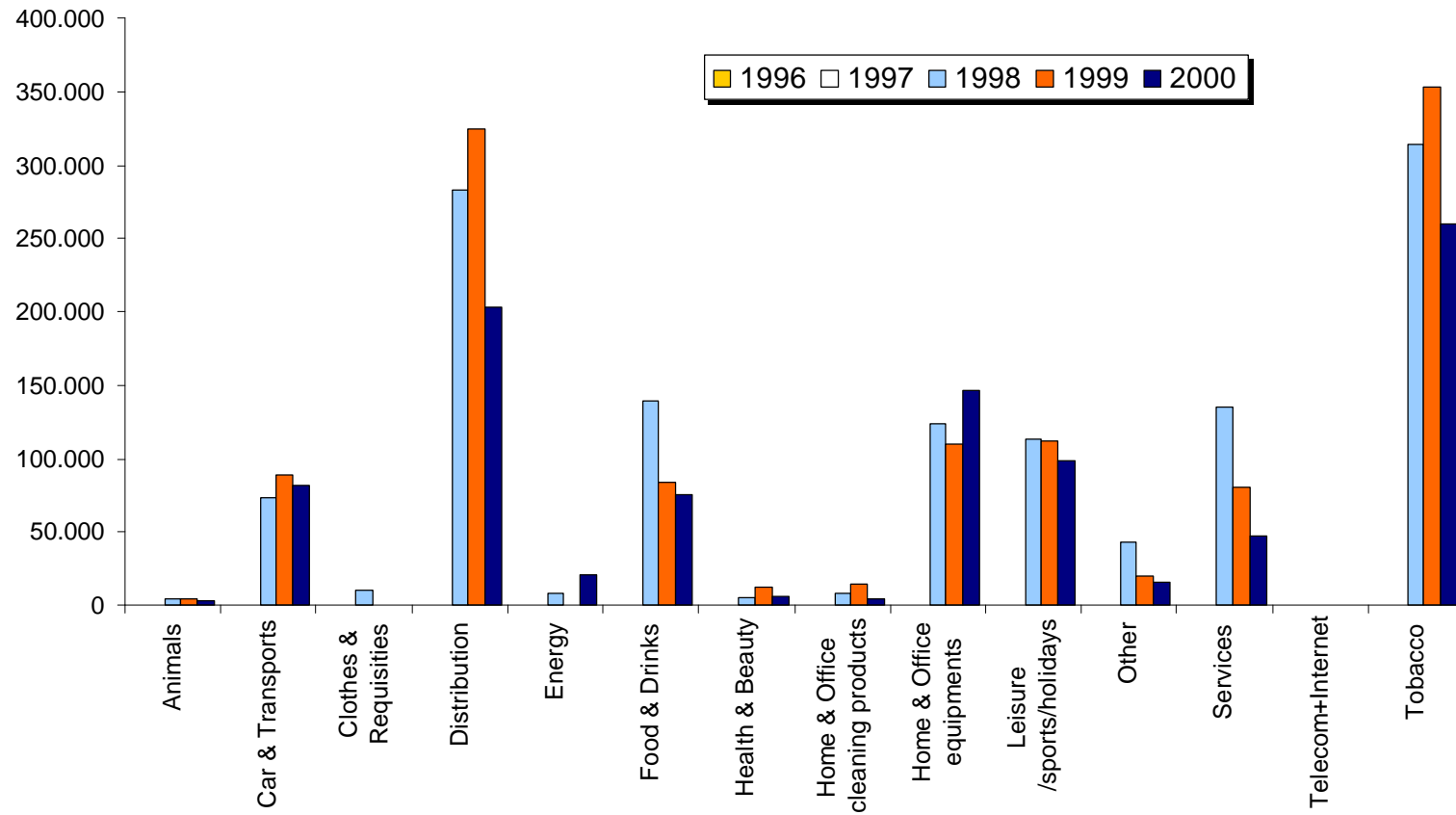


Media Investment Radio Rijnmond

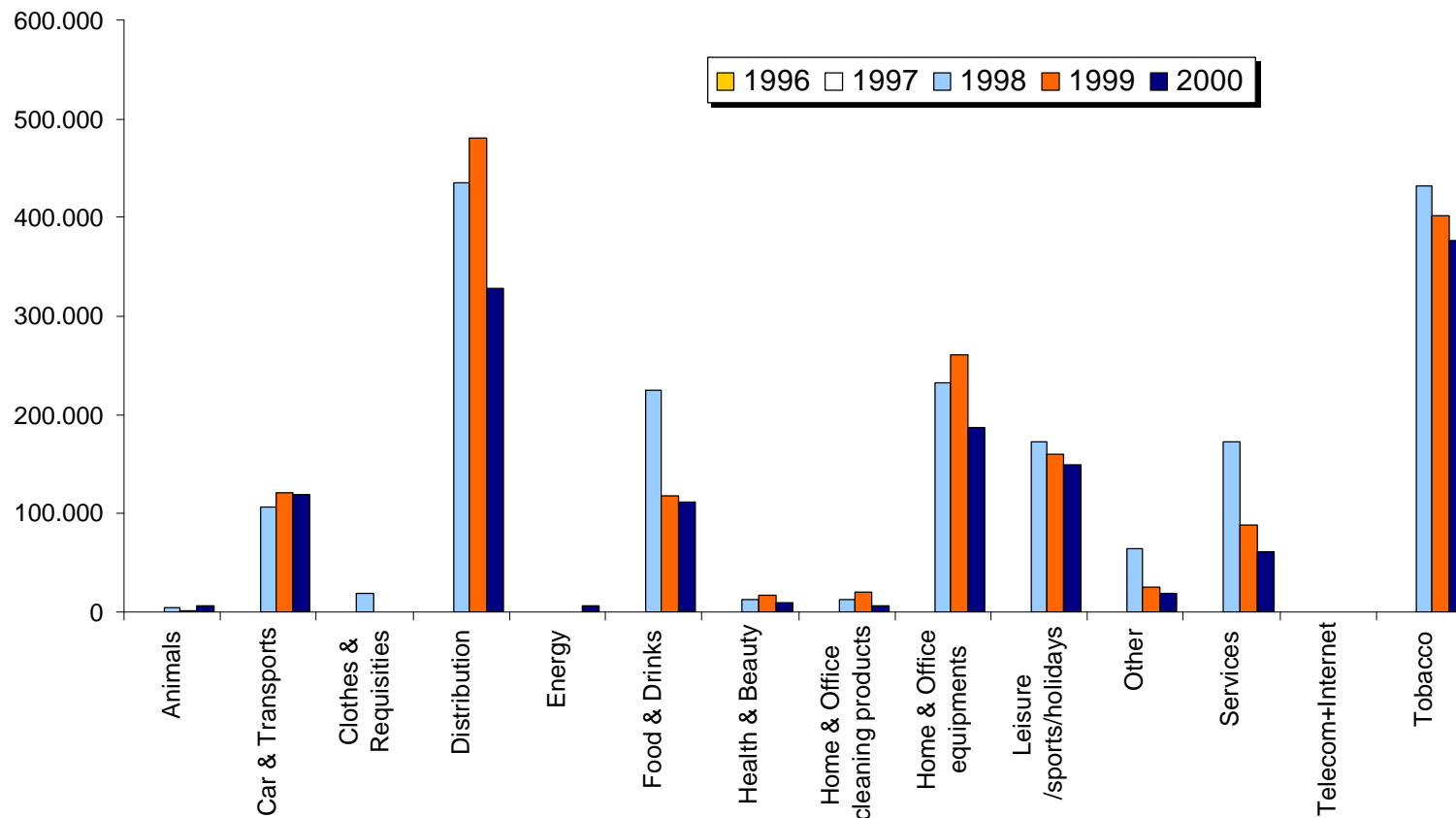


Media Investment

Radio Oost



Media Investment Omroep Gelderland



Media Investment Omroep Flevoland

