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INSIGHT



AN OVERVIEW OF BEST PRACTICE AND KEY DEVELOPMENTS IN **RADIO** AND **AUDIO AUDIENCE MEASUREMENT**



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ABOUT THIS PUBLICATION

This report offers an overview of the methodologies used to measure radio and audio across Europe and beyond and is an update of the earlier egta publications on the topic. egta's objective is to give readers a better understanding of the range of techniques and technologies in use to measure radio and audio audiences today.

Currently, most of the official Radio Audience Measurement (RAM) currencies are carried out by: (1) declarative means (day-after recall – DAR or diaries), (2) through the use of electronic (passive) technology, or (3) via hybrid models combining both approaches. This report proposes an analysis of the benefits and limitations of each radio audience measurement methodology.

The report also includes a more in-depth look at several markets that have an innovative approach to RAM and/or that have recently transitioned to hybrid or electronic measurement.

This report is not intended as an exhaustive account of all current developments taking place in the field of audio measurement, rather it offers an overview of a topic that is in a constant state of evolution.

This report focuses on the measurement of broadcast radio and the audio formats that are covered by and included in the radio measurement systems currently in place across markets. The final two chapters examine the techniques being deployed to measure digital audio and podcast listening, along with examples of various additional initiatives covering these newer audio formats.

In terms of resources, the document draws on multiple reports, insights from egta members and contributions from audience measurement organisations and experts in order to compile the necessary data.



CHAPTER 01: AN OVERVIEW OF EXISTING RADIO AUDIENCE MEASUREMENT METHODOLOGIES

Radio Audience Measurement (RAM), in one form or another, is carried out in almost every European country, and has long provided the independent and audited data on which radio advertising has been traded. Unlike for other media, such as television and online, the methodologies used to measure radio differ quite widely between countries.

Radio is a highly mobile broadcast medium which, as a consequence, makes radio audience measurement challenging. Whilst TV viewing is extending beyond the living room screen, a significant proportion of premium television is still watched on one or more devices in the home. Radio consumption, however, takes place in various different locations: in the home, on the go, in the car or on public transport, at work, etc. Another challenge associated with the multiplatform habits of radio consumption is the fact that it may take place through an FM/AM or DAB+ (terrestrial) signal, or the audio may be delivered via a connected IP device.

A. MAIN METHODOLOGIES IN PLACE

Radio is measured by two primary means: firstly, asking people to actively remember or record their listening behaviour over a period of time (declarative); and secondly, by the use of technology that passively detects any audio in the vicinity of the individual being measured (electronic/passive).

The former set of methodologies are the most commonly employed throughout Europe, and these can be broadly classified as Day-After Recall (DAR) and Diaries. A variety of recall data collection methods are used, the predominant one being Computer Aided Telephone Interviews (CATI). Computer Assisted Web Interviewing (CAWI), in which the data is collected online, and face-to-face interviews are used in a few cases. Diaries have traditionally been paper formats, filled in by panellists, but recently the majority of the diary markets have moved to introduce online and/or mobile versions.

Electronic measurement was first developed in Switzerland with the 2001 introduction of the GfK Telecontrol Mediawatch. This was followed by Arbitron's – later bought by Nielsen – Portable People Meter (PPM), which was introduced to larger markets in the US in 2007. The PPM methodology is currently in use for the trading currency in Canada, Iceland, Norway, the US and other markets. The French research organisation Médiamétrie has developed a similar meter called RateOnAir. A third type of passive measurement technology uses smartphone software applications (apps). Ipsos, for example, developed MediaCell, which has been part of a hybrid solution in the UK, and has recently been introduced as the main measurement technology in the Netherlands. The Czech research company MEDIAN has also developed a similar technology, under the name adMeter, which is being used for cross-media planning and assessment of television, radio, online and other media types.

FIGURE 01: An overview of radio audience measurement methodologies

Country	RAM Methodologies	Institute & Supplier
Austria	DAR - CATI DAR - CAWI	GfK Reppublika
Belgium	Diary	CIM / GfK
Canada	Electronic: PPM Diary DAR: CATI	Numeris radioCount
Czech Republic	DAR: CATI Electronic: adMeter	MEDIAN
Denmark	Electronic: RateOnAir	Fifty5Blue (former name: Kantar)
Finland	Diary	Finnpanel
France	DAR: CATI Electronic: RateOnAir	Médiamétrie
Germany	DAR: CATI DAR: CAWI	agma
Iceland	Electronic: PPM	Gallup Iceland / Fifty5Blue (former name: Kantar)
Ireland	DAR: PAPI - face-to-face interviews	JNLR / Ipsos
Italy	DAR: CATI	GfK
Netherlands	Electronic: MediaCell DAR: e-Diary (for 13-17 age group)	NMO / Ipsos
Norway	Electronic: PPM	Nielsen
Poland	DAR: CATI Diary	KBR / Fifty5Blue (former name: Kantar)
Portugal	DAR: CATI DAR: CAWI	Marktest
Slovakia	DAR: CAWI DAR: PAPI	MEDIAN
Spain	DAR: Face-to-face and online interviews DAR: CATI	AIMC
Sweden	Electronic: RateOnAir DAR: CATI	Fifty5Blue (former name: Kantar)
Switzerland	Electronic: MediaWatch	Mediapulse / GfK
UK	Diary Electronic: MediaCell	RAJAR / Ipsos
US	Electronic: PPM Diary	Nielsen

Last updated: April 2026

CATI: Computer Aided Telephone Interviewing
CAWI: Computer Assisted Web Interviewing
DAR: Day-After Recall
PAPI: Paper and Pencil Interviewing
PPM: Portable People Meter



B. AUDIO MATCHING AND WATERMARKING

Electronic audio measurement meters use two primary technologies to register the content that they are exposed to: audio matching and watermarking. In some cases, they employ a combination of both.

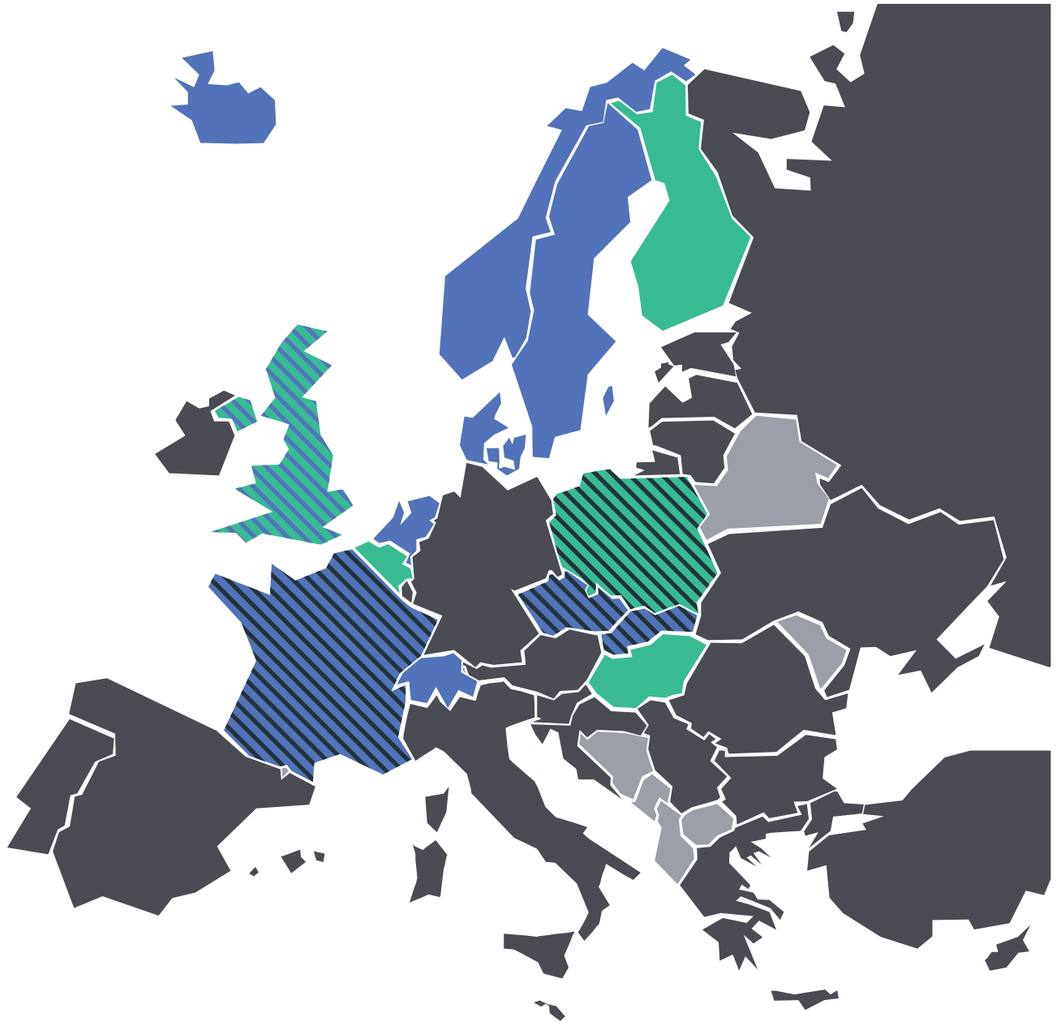
Devices that use audio matching record and compress samples of the ambient sound several times each minute, and effectively create digital fingerprints that can then be matched against stored recordings of the original radio broadcasts. This solution does not require radio broadcasters to have any additional studio equipment to insert a signal into the audio stream. However, if two or more radio stations are playing the same content at the same time, for instance a syndicated chart show or simulcast news bulletin, audio matching meters cannot identify which station is responsible for the broadcast. Likewise, the meters are unable to identify the radio platform being used, for instance FM, DAB+, digital terrestrial television, etc.

Meters that use watermarking, or encoding, pick up inaudible signals that have been inserted into radio broadcasts. The information is collected by the device, which reports back the station identification and the date and tune in/out times of listening to the measurement company. Watermarking also allows different broadcast platforms to be identified, as alternate signals can be inserted into the FM, DAB+, streams, etc. For all its advantages, watermarking requires all measured radio stations to insert the watermarking signal into the broadcast, which entails additional costs.

C. THE EMERGENCE OF HYBRID METHODOLOGIES

Several markets use a number of different measurement methodologies in parallel, examples of which include Austria and Poland. In recent years a few markets have also tested and implemented hybrid systems that combine electronic technology with recall methods which is the case of Australia, France and the UK among others. The objective behind combining methodologies is to overcome limitations of one method and bring the best of the other. Moreover, on some markets, hybrid solutions may be more viable than full measurement re-shuffle.

FIGURE 02: Radio audience measurement methodologies in Europe



Last updated: April 2026

CHAPTER 02: THE ADVANTAGES AND DISADVANTAGES OF DECLARATIVE AND ELECTRONIC METHODOLOGIES

Each measurement system has its own characteristics, strengths and weaknesses, and radio audience measurement by nature requires a compromise to find the solution that best matches a particular market. Declarative methodologies are cheaper to implement and maintain than electronic systems. They allow large samples sizes and are able to deliver robust data on fragmented markets that feature large numbers of smaller radio stations. Despite their lower levels of granularity and (at least perceived) accuracy, declarative methodologies are generally accepted by buyers, and they perform their role as a basis for radio advertising trading effectively.



Electronic measurement offers several advantages over methodologies that require respondents to remember or actively record what they have listened to: they can deliver highly accurate, minute-by-minute data with very little delay after the time of broadcast, and they deliver metrics in a similar form to television and digital media. However, they are not without their limitations. The high cost of electronic meters compared to diaries or interviews means that sample sizes tend to be relatively small, and this presents challenges for smaller and local radio stations which can suffer from zero ratings, as advertising breaks may not be recorded at all by the panel. For this reason, countries such as Sweden and the US maintain day-after-recall (DAR) and diary measurement to measure local stations and smaller designated market areas (DMAs) respectively. As mentioned earlier, there are limitations to both audio matching and watermarking technologies. The introduction of electronic measurement has been successful to date in European countries that have firstly been able to find a common agreement within the radio industry and secondly translate the advantages of accurate, granular data into higher prices per contact and gain acceptance of a new pricing structure by radio buyers.

Figures 03 and 04 give a breakdown of the pros and cons of declarative and passive measurement methodologies.

FIGURE 03: A comparison of the pros and cons of diary and day-after recall methodologies

DIARY

⊕ PROS	⊖ CONS
» Data collection from same person during the week, providing a more reliable picture of radio consumption from day to day	» Reliability and granularity of the data – people tend to over-report their 'top of mind' stations and are less precise about the stations they listen to less frequently
» Opportunity to correctly calculate cumulative weekly reach, frequency of listening and Time Spent Listening (TSL) from day to day	» Lack of control over respondents – more dependent on their discipline
» More detailed picture of individual listener behaviour	» More expensive than recall studies
	» Requires higher investments in operations and interviewers
	» Difficult to reach specific target audiences (e.g. people with high income, young people, etc.)

DAY-AFTER RECALL: CATI/CAWI

⊕ PROS	⊖ CONS
» Higher control over standards and consistency of data collection compared to self-filling diary – the question is always about yesterday	» Relative error caused by the fact that different people provide data for different days of the week. As a result, there may be modelling errors with the estimation of weekly reach
» Less expensive than diary	» Less granularity of the data as a result of memory errors
» Better accessibility (compared to diary) for specific and narrow target groups	» A limited number of stations can be encoded due to the restricted CATI interview time frame (not the case for CAWI)
» Usually delivers higher general reach figures compared to diary	» Usually delivers smaller reach for Average Quarter Hour (AQH) compared to the diary
» Bigger sample size possible, offers greater frequency of reporting	
» Data collected for different days of the week	
» Less work for the respondent	

FIGURE 04: A comparison of the pros and cons of declarative and passive methodologies

ELECTRONIC: PASSIVE MEASUREMENT

PROS

- Brings common currency to TV and radio buys
- Easy to buy – easy to sell based on GRP or impressions
- Easy and quick to do follow-ups
- Higher accountability and granularity: minute-by-minute audience data
- Continuous listening and all listening occasions measured
- Low dropout expected due to lower respondent burden
- Better optimisation of radio programme and campaign planning due to overnight reporting
- Very short delay between data collection and reporting, bringing radio in closer alignment with TV and online
- More reliable differentiation between broadcast platforms (with watermarking technology

CONS

- Reluctance towards adoption: lack of consensus and unified support among industry actors
- Measuring presence in proximity to radio signal, different definition of listening and different basis for brand recall research
- Small sample efficiency – figures are not reliable in all demos and especially in the case of small stations and regions for short time periods
- Higher cost
- Audio matching devices may not differentiate between stations broadcasting the same content at the same time
- Watermarking devices do not capture 100% of listening occasions, and may perform poorly in high background noise situations
- Generally delivers lower TSL than traditional methodologies, requiring the buying market to accept changes to advertising pricing
- Headphone listening challenge
- Difficult and expensive to build and maintain a robust sample for a fragmented market
- Lower inventory than CATI
- Zero rating issue, especially for smaller stations and off-prime time slots
- Comparable currency to TV buying does not automatically mean clients will opt for combined bundles of radio and TV. These packages are not easy to put together as the sales forces are often separate. Plus there are creative boundaries, big clients often run TV campaigns across several markets and it is difficult to negotiate changes within a single market.

DIARY/DAY-AFTER RECALL

PROS

- Traditional and established method: stability of the advertising sales market
- Lower cost
- Large sample
- Potential for more user-friendly format (online diary, smartphone applications), leads to higher respondent commitment
- Generally delivers higher TSL figures than electronic measurement

CONS

- Lack of common radio and TV currency
- Lower accountability and granularity: delivering listening rate per quarter/half an hour, and infrequent reporting
- Lower accuracy: inability of people to recall and identify every listening occasion after time
- Higher burden on the respondent
- Longer delay between data collection and reporting



CHAPTER 03: THE EXPERIENCE OF SWITCHING TO ELECTRONIC MEASUREMENT

An analysis of comparative figures for electronic and declarative measurement shows a very consistent pattern: reach for individual stations tends to be higher under electronic measurement, whilst Time Spent Listening – TSL is generally lower when compared to figures returned by DAR or diaries. This results in a drop in ratings for which a pricing correction needs to be applied in order to maintain at least an equivalent level of advertising investments when switching to electronic measurement. This pattern can be largely explained by the fact that respondents tend to overestimate the time they spend listening to their favourite stations and may not report listening to alternate stations or those they hear on public transport, when in other people's cars, etc. Conversely, passive technology picks up all of these audience contacts, which translates into higher reach for stations.

A. SWITZERLAND

The main characteristic of the Swiss radio market is its fragmentation with large number of stations operating in the country. The GfK MediaWatch has been in use in Switzerland since 2001 and is recognised as the national currency. As was the case in other markets, the audience data before and after the switch to passive measurement showed greater reach figures and a lower listening time under MediaWatch compared to the previous interview method.

▶ Evolution of MediaWatch

After five years of development, GfK launched the fourth generation of MediaWatch in 2018. The measurement system has been in use ever since and has provided a valid measurement even during the Covid lockdown. The measurement product coordinated by Mediapulse – the Swiss joint industry committee – is called Mediapulse Radio Data and provides audio matching for about 220 radio stations via a daily sample of 2.000 people representing the Swiss population in the 15+ age group. The measurement covers all distribution channels of radio programs – via FM, cable, satellite, DAB +, streaming – that are broadcast live. The research is supported by governmental subsidies, while the resulting radio data is available to all market stakeholders and the public.

In terms of recent methodology adjustments, in 2023 the sample was reduced from 2.400 to 2.000 panellists measured each day. Watch wear period was changed from the options of one, three or six months to one or six months. Technical improvements were also introduced to be able to more precisely filter out arbitrarily reported usage (false positives) and thus to increase the validity of measurement, especially for small radio stations.

The main strengths of the Mediapulse Radio Data are continuous passive measurement (to the nearest second) of the radio audience, and fast data reporting on a daily basis with a set-off of 7 days. However, audience data should ideally be analysed over an aggregated period of several weeks.

▶ Panel structure

For the Mediapulse Radio Data panel, a pool of at least 9.950 participants is recruited from the 15+ population of the country. Of these, at least 1.533 people provide measurement results every day (net sample) split among the German-speaking, the French-speaking, and the Italian-speaking communities.

The recruitment process is based on a combination of random selection and quotas. Quotas specify the ratio according to which certain characteristics (such as age, gender, recruitment zones) must be distributed in the participants pool and in the daily sample to make it representative of the population. Within the ratios specified by these quotas, people are randomly selected and recruited by telephone or in writing. The prerequisite for participation is sufficient knowledge of one of the national languages (to be able to follow instructions and complete a questionnaire). Participants wear a watch (MediaWatch 4) for the duration of their assigned wearing period (one or six months).

▶ Future developments

Mediapulse Radio Data represents an evolution of a well-established and widely accepted radio currency. However, it also has several characteristics inherent to electronic measurement, such as relatively high maintenance requirements and costs, as well as the inability to cover listening via headphones or time-shifted listening (including podcasts).

There is a need to significantly reduce the budget while maintaining a sufficient level of quality in terms of validity, reliability, precision, and measurement stability. In collaboration with the Swiss radio market, Mediapulse is currently working on identifying a future measurement solution – expected to be implemented in 2028 – that meets these requirements as effectively as possible.

▶ Additional offer: Mediapulse radio streaming data

Since the beginning of 2025, Mediapulse has been offering a new product: Mediapulse Radio Streaming Data, which complements the existing radio currency. It provides standardised and therefore comparable counting of web stream listening sessions for radio channels and reports these in the form of a regularly published list of all participating channels and their measured key figures.

This enables the potential advertising inventory for pre-roll radio streaming advertising to be quantified, based on the assumption that each start of a listening session represents a potential request for the playback of digital advertising



Source: Mediapulse

B. UNITED STATES

TThe Nielsen Portable People Meter (PPM) has been the currency for the US radio industry for more than a decade. In the 48 markets in which the PPM is used as the measurement solution there are approximately 80.000+ PPM panellists on any given day. Nielsen also provides diary measurement in 193 local and metropolitan areas on a biannual or monthly basis, depending on the market..

▶ Switch to PPM

PPM was introduced as a replacement to diary data in some parts of the country starting in 2007. As of 2026, 48 out of 273 designated market areas (DMAs) are measured using PPM, whilst the remaining 225 metro and non-metro areas continue to be measured using diaries.

Nielsen uses the PPM data to produce local ratings reports for each of the 48 markets, which it delivers monthly. The data is based on the average four weeks of survey results.

Nielsen uses the diaries to produce local ratings reports, which it delivers quarterly, biannually, or a rolling 3-month average, depending on the market. The data is based on the average of 12 weeks of survey results. In 2019, 46 four-book diary markets were transformed to Continuous Diary Measurement (CDM), where data is reported monthly using a rolling 3-month sample.

The national radio ratings combine passive and declarative methodologies, and the reporting is a traditional average quarter hour (AQH) figure delivered four times each year. This relatively low granularity helps to avoid potential instabilities in electronic measurement whilst offering greater accountability to the market. It also ensures that the trading practices are consistent across national radio advertising.

▶ Impact of the switch

Comparisons between diary and PPM data made at the time PPM was introduced show that smaller stations increased their share of overall listening at the expense of larger stations, while less popular dayparts increased in importance versus peak time slots. Moreover, in comparison to previous methodologies, the switch to electronic measurement led to a fragmentation of listening and decrease in time spent listening (TSL).



▶ Evolving PPM technology: wearables

TThe US radio measurement has transitioned from PPM360 meters to wearables. The wearable devices are smaller, more appealing, and easy to wear. The PPM wearable ecosystem gives panellists three choices on how to wear their meter device: a wristband, a clip that can fit in the pocket or on a belt, or a pendant that can be worn around the neck. Other measurement components include a beacon and data hub installed in the home as well as a companion smartphone app. These are all used to transmit media consumption behaviour back to Nielsen's servers as well as detect whether the meter is at home or out of home.

After the initial rollout of the wearables, Nielsen observed a longer carry time. Meanwhile, 74% of online panellists and 88% of online households with a wearable have installed the companion smartphone app. The rollout of the new PPM wearable started in May 2022. As of January 2024, 100% of the panel is equipped with the wearable device.

▶ PPM headphone adjustment

Headphones listening has increased significantly while today's PPM device can only detect what is played out loud. With the PPM360 meters, Nielsen used an adapter to address this challenge, but this only accounted for wired headphones as opposed to wireless headphones, and was dependent on panellists remembering to use the adapter.

In October 2020, Nielsen introduced a Headphone Adjustment Factor to better reflect listening on headphones and earbuds in its PPM ratings service. The quarter-hour estimates for encoded station streams were adjusted to compensate for listening uncaptured by the meter. The original adjustment, which was made starting with the October 2020 survey, was based on data from a survey of 5.000 former PPM panellists, including a one-day online diary where participants submitted their listening behaviour. From the online survey of former PPM panellists, Nielsen quantified that 5% of uncaptured audio listening takes place via headphones. Based on these findings, Nielsen calculated a 1.6 lift factor for the previously uncaptured headphone listening, which was included in the currency as of October 2020 and was further updated with the April 2022 PPM survey and again with the January 2024 PPM survey. This solution has been accepted by the market.

In the short term, Nielsen plans to continue to rely on the headphone adjustment method to reflect listening taking place on headphones. However, the source of the data for the adjustment factor calculation may change as Nielsen explores other surveys that will allow for more frequent headphone adjustment updates.

▶ Evolving diary for small markets – mobile diary mSurvey

As announced in 2023, Nielsen will start replacing paper diaries for a subset of household demographics in 2026. The new collection instrument, known as mSurvey, will use a modernized method of data collection optimised for mobile phones, tablets and laptops. While the collection method is changing, the diary service will remain a survey-based probability sample, projectable to the population, with sample sizes comparable to the previous paper diary system. Nielsen will ask respondents to record all of their radio listening during a seven-day period. The mSurvey will also capture household demographics. By asking survey participants to record listening to AM/FM radio, radio station podcasts, satellite radio, and streaming, Nielsen aims to provide a more holistic picture of audio listening in its 200 diary markets.

mSurvey respondents will receive digital incentives, like electronic gift cards or other rewards that are delivered immediately once they submit their completed diary. In order to help improve the representativeness of its diary service, Nielsen plans to select the households or people in the demos the panel is most deficient in and more likely to return an electronic diary than a paper diary. The electronic diary will also help to reduce Nielsen's carbon footprint due to the paperless collection process. Several rounds of testing have been completed before the full deployment in 2026.

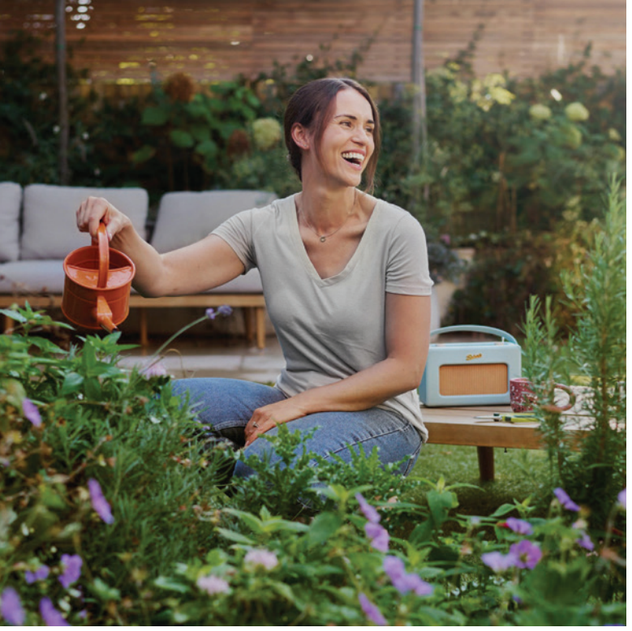
▶ The 3-minute listening qualifier

To be counted in a radio station's Nielsen audience estimate, listening sessions historically had to total at least 5 minutes within the quarter-hour. In order to better align radio measurement with radio usage, Nielsen will be modifying the minimum qualifier to credit listening from 5 minutes to 3 minutes across 48 Radio PPM markets. The change was implemented in January 2025.

Nearly half (45%) of radio occasions are shorter than 5 minutes and are currently uncredited. A move to the 3-minute listening threshold is expected to create a one-time increase in radio listening levels for all stations across all PPM markets.

Benefits of the 3-Minute Qualifier:

- Measurable ad impressions have increased as more listening is logged and reported, providing stronger inputs for attribution, outcomes measurement, and mix models;
- Previously uncredited listening around the quarter-hour break is now captured;
- Reach for radio expanded as more daily cume is credited, and time spent listening has grown as more listening events from existing listeners are captured;
- Advertisers benefit from increased choice, with more dayparts, formats, and stations available;



» Radio programmers are better equipped to optimise ad breaks and commercial placement.

▶ Nielsen One for audio

For the past years, the big focus on the US measurement market has been the development and rollout of Nielsen One, the cross-platform measurement system that uses a single metric to track media consumption across platforms. So far, the project has been focused on TV and video, but ultimately the system will also measure broadcast radio, radio streaming, other types of streaming, and podcasting.

The purpose of Nielsen One for audio is to complement the PPM panel with the digital audio measurement from streaming server data ensuring a total audio audience footprint. The objectives are to make the most of panel and census measurement, to have comparable metrics across audio platforms, to deduplicate audience, and to provide audience measurement for both content and ads.

Sources: Nielsen; Wearable PPMs, PPM Headphone Adjustment, Mobile Diary, e-Screener, Nielsen One for Audio, The 3-minute Listening Qualifier

C. CANADA

Broadcast media in Canada is one of the few media choices that uses third party measurement to generate audience data used as currency in the buying and selling of media. Live broadcast radio measurement is conducted by two third parties: Numeris and radioCount providing independent measurement of the Canadian member stations.

▶ Switch to PPM

Portable People Meters were introduced in Canada's largest radio markets of Montreal, Toronto, Calgary, Edmonton and Vancouver in 2009. Prior to the introduction of PPMs in the 5 markets, Numeris' primary method for measuring radio audiences in Canada was through diary-based surveys, where listeners manually recorded their radio listening activities. This methodology continues in 22 markets across Canada, however using mostly online rather than paper diaries.

The transition to PPMs revealed higher reach numbers and detailed listening behaviors, capturing more incidental and background listening that diary methods often missed. This change provided a more accurate depiction of when and how people listened to the radio, including overnight ratings and minute-by-minute data.

During the period when PPMs were being introduced, the radio industry in Canada saw a decrease in revenues by 5.2%. This loss cannot be entirely attributed to the roll-out of PPMs, as there was a broader economic downturn that affected media investments in general. By 2012, revenues had grown modestly from 2009. Although there was some recovery post-recession, the growth in radio investment remained relatively stable and did not exhibit significant increases during the initial years following the introduction of PPMs.

Conversion factors were used to align PPM GRPs with diary GRPs in order to maintain consistency in media planning and buying across markets, particularly for national advertisers. Some buyers and sellers did not agree on factors being used which caused protracted negotiations in some cases. Eventually, the conversion factors were dropped and PPM markets adjusted to the lower planned GRP levels with higher reach and lower frequency deliveries. Stations' CPRs increased as a result, however market investment remained consistent.

▶ Numeris: combination of PPMs and online diaries

Numeris provides data on broadcast measurement and consumer behaviour. It is a tripartite non-profit organization that provides audience and ratings data to Canadian broadcasters, advertisers, and other broadcast-related organizations in both English and French Canada. Currently, Numeris deploys two different methodologies to measure audio in Canada: Portable People Meters (PPMs) and online diaries.

The Numeris PPM panel is made up of over 4.560 households totalling over 8.700 Canadians. The Meter Panel consists of randomly selected Canadian households, and Numeris requests that individual members carry a PPM to track their radio listening and TV viewing habits. The PPM is designed to pick up codes regardless of the specific device being used to consume the media. PPMs automatically download the data at the end of each day, and Numeris processes and releases the information to its clients. The meters passively collect measurement every day of the year, crediting listening and viewing by the minute. Numeris releases Radio PPM Data in 13-week cycles for: Montreal, Toronto, Calgary, Edmonton and Vancouver.

In 22 markets, Numeris measures weekly listening. Participants in each measured market are asked to record the radio stations they listen to, the times they listen, and the duration of their listening sessions in an online diary over a specified period of time, typically one week. The data is then categorized by Numeris into average quarter-hour periods



(AQH) for each day of the week between 5 AM and 1 AM. Diary measurement credits 15 minutes of listening for each diary entry. Numeris historically used a combination of paper and online diaries for measurement. Since 2020, most diaries are now completed online, and the data is released in the Spring and Fall.

▶ radioCount: combination of telephone interviews and e-surveys

The radioCount approach uses a combination of telephone interviews and e-surveys to deliver ratings and audience data in Canadian radio markets not measured by Numeris. To ensure a broad representation of radio listening within a market, only one person per household is permitted to participate. Participants are asked about their radio listening over the past 24 hours, with unaided station identification. For each station that the participant indicated they listened to, radioCount records tuning times and session durations at the quarter hour level, followed by a short list of qualitative questions.

radioCount releases data in the fall based on an 8-week measurement period. Some markets are measured continuously throughout the year. The collected data is used to determine a



station's listener profile, audience reach within the measured market, time spent listening, market share, and commonly used statistics.

▶ Continuous measurement

Numeris in all of their diary markets, and radioCount in some of their markets, use continuous measurement to bring year-round recruitment and measurement to the Canadian AM/FM radio landscape. Continuous measurement improves the stability of radio ratings, reducing their susceptibility to fluctuations. Using a 12-month rolling average of continuous measurement smooths out peaks and valleys, resulting in a continuous refresh of the market's performance.

▶ Challenge of the three discreet measurement systems

Due to having three distinct measurement services with differing methodologies, the radio industry is unable to generate Total Canada reach numbers. As a result, PPM's reach as reported in the five markets is used; however, this only represents approximately 45% of Canada's total English and French population.

▶ Audio measurement: streaming and podcasts

For broadcasters in PPM markets, their digital signals are encoded for capture by the PPM device and are reported in the total tuning audience. Broadcasters can also provide streaming data delivered through their station apps or website and provide the same metrics as the digital pure plays. Real-time reporting of impressions starts when a digital connection is initiated at the beginning of a session and ends when the connection stops. Metrics for digital audio focus on unique streams, total listening hours, and active sessions.

The podcast market is fragmented across multiple platforms. Each platform may use different metrics or methodologies to generate audience data therefore making standardized reporting difficult. However, the use of a combination of download numbers, unique downloads, listens, subscriber numbers, and audience surveys is providing podcasters with an increasingly complete picture of their audiences.

Sources: Radio Connects, Numeris, radioCount

D. NORWAY

Norway was the first country in the Nordic region to switch from the CATI method to PPM. The industry ran a pilot in 2005 and had PPM panel currency established in 2006. The contract with TNS Kantar awarded in 2013 – expired in 2018, and the following measurement contract was awarded to Nielsen in 2019.

▶ Switch to PPM

The demand for electronic measurement was driven mainly by media owners (both public and commercial). Since many of them also sell TV, they were pushing to have a comparable currency.

A dual measurement was in place up until 2017, after which CATI continued to be used for the local stations. Following the switch, there were 45.000 interviews performed based on 30-minute reach and the reporting was delivered monthly. The PPM measured national stations, had a sample of approximately 1.000 individuals, and provided minute-by-minute data and daily reports.

The TNS Kantar panel (under a contract awarded in 2013) started with 1.200-1.400 individuals and the minimum reporting requirement was at least 1.000 individuals. The panel rotation was approximately 20-25% annually but there was no maximum or minimum limit. The primary variables included gender, age and education, the panel was not weighted on income or geography. In terms of rules for the duration of listening, PPM searched for a signal every 15 seconds. If a station was picked up at least twice for a duration of 15 seconds, it got awarded a whole minute.

▶ Impact of the switch

Following the switch, the daily reach increased by 21%, but the Time Spent Listening (TSL) – measured more accurately under the new system – dropped by 33% among listeners and by 20% in TSL total consumption. In general, smaller stations grew and bigger ones dropped, but the overall top five channel ranking did not change. When the minute data came in, broadcasters observed an "icicle phenomenon" i.e. people switching stations much more frequently than originally expected. In terms of impact on sales and pricing, the cost-per-spot was replaced by the cost-per-GRP (TRP) method in one demo of 12+ years old. The panel was not big enough to allow for narrower target groups.

The switch to PPM also resulted in a 30% reduction in inventory value compared to CATI. The 93.700 listeners per quarter hour (AQH) registered under the CATI methodology translated to 65.600 listeners per minute (GRP) under PPM, which underlines the importance of redefining the contact value of radio for the new currency to reflect different listening definitions and measurement systems. Thanks to the relatively small size of the Norwegian market, a quick understanding was reached and allowed a drop in inventory to lead to an increased gross price. The product is the same but the additional value of a PPM-measured listener is higher than a CATI-measured listener. Coincidentally, the new gross CPT on radio became half the price of TV. The broadcasters successfully communicated the additional value of a PPM-measured listener over a CATI-measured listener, and revenues grew strongly after the measurement was introduced. Radio's advertising market share increased from 5.2% in 2006 to 7.9% in 2013 (Nielsen, gross figures). In addition to more reliable data, radio and television under the new system are bought by the same media buyers using the same currency as TV, reducing complexity and increasing the number of radio buyers.

▶ Current measurement landscape and wearables

Nielsen has measured radio listening in Norway since 2019, based on a reporting panel of 2.000 individuals 10+ years old, and was awarded a new contract in 2023 to provide an even more accurate representation of Norwegians' listening habits.

The current system measures and reports on all editorial and commercial audio content from participating parties, live to time-shifted up to 7 days. It measures all radio listening behaviour regardless of distribution platform and listening equipment, at minute level granularity.

In Norway, for the first time outside of the US, Nielsen's new wearable PPM meters are now being used as the basis for official national currency figures for radio. The introduction of Nielsen's PPM wearables started in January 2023.

PPM wearables is Nielsen's newly developed portable measurement meter. The wearable meter is based on the current PPM technology, and has a modern and more user-friendly design. Testing in both Norway and the US has shown that the new wearable meters are more appealing and easier to use for panel members, and thus higher level of compliance and use is expected with these new devices.

Replacing the PPM meters with new PPM wearables in Norway was completed at the end of 2024, resulting in a market with a national radio currency 100% based on wearables. As hoped, compliance has increased, mainly due to the higher carry time by the panellists.

As more and more Norwegians listen to radio using headphones, Nielsen has developed a machine learning model for daily estimation and inclusion of listening to radio using headphones integrated in the measurement system.

Sources: Viaplay Norway, Nielsen Norway

E. ICELAND

PPM measurement was introduced in Iceland in 2008, when the diary method was replaced for both radio and TV. The same panel is used for measuring both TV and radio. This has strengthened radio, as it is possible to plan TV and radio jointly, and run reports from the same data source.

The measurement is provided by Gallup Iceland in cooperation with Kantar. Overall, radio is very strong in Iceland with a 15% share of the advertising market.

▶ Switch to PPM

The radio share of the market has in fact never been higher than in the last decade following the introduction of electronic measurement. The total reach of audio was not affected by the switch to PPM and remained almost the same as under the diary system (87.2% under diary versus 88.9% under PPM). The reach of individual radio stations increased with the exception of one talk station with an elderly audience demographic. The time spent listening declined as experienced by other markets that switched to PPM. Ratings fluctuated less over the course of the day, while less popular day parts increased in importance compared to peak time slots.

According to Icelandic broadcasters and agencies, the introduction of PPM facilitated the success of radio during the last decade. The reason behind this positive impact was the improved perception of radio due to the accuracy and reliability brought by passive measurement. The switch was welcomed by both marketing managers and agency planners, particularly thanks to the audience results being available 52 times a year compared to four times under the previous system. PPM was also instrumental in raising the profile of radio in the industry press with the two main stations competing head-to-head for the lead position every week.

▶ Current measurement landscape

The PPM panel is drawn from a reference population aged 12–80, comprising approximately 267,000 individuals. The panel includes around 500 participants. Gallup plans to introduce mobile meters and return-path data as measurement tools in 2026, replacing Nielsen's PPM 360 portable meter.

Source: RÚV – The Icelandic National Broadcasting Service

F. SWEDEN

Before the introduction of PPM, the Swedish radio market was measured by the CATI method and radio was sold based on cost-per-spot. In 2012 PPM tests were launched and for a period of time, both types of measurement ran in parallel.

▶ Switch to PPM

The electronic measurement officially launched in 2013 and provided a more precise picture of radio listening, as well as offered a refined radio product with guaranteed GRPs, transparency and accurate delivery. Kantar installed 1.250 meters in 700 households with approximately 1.050 individuals reporting per day (1.000 is a minimum). The minimum reach criterium is 3 minutes of listening (under CATI – it was 5 minutes). As a result of the switch to electronic measurement, radio began to be traded on TRPs (contacts) instead of spots, and "floating" inventories became the norm i.e. clients paid for the contacts delivered not based on time slot or number of slots.

Comparison of CATI and PPM results showed a higher cume reach of total radio, shorter listening time overall but higher listening in the afternoon, as well as lower AQH and TSL for individual stations. As a result, an average campaign gained higher net reach and lower frequency, leading to a decrease in gross reach. Another outcome of the switch was that the volume of advertising inventory decreased correspondingly to a decrease in ad break ratings, while CPT prices went up around 30% to balance this decline in ratings. The minute-by-minute granularity and relatively small panel size meant that the market has suffered from zero ratings for smaller channels in certain dayparts, but overall, the implementation has benefited the Swedish radio market, which has seen gains in ad spend. PPM also allowed broadcasters to evaluate programming and music much faster and thus complemented other content related research.

▶ Current measurement landscape

In 2020, a new radio measurement was launched in Sweden, with Kantar Media as a provider. National radio is currently measured by a panel with on average 1.550 reporting panel members per day. The technology used is the RateOnAir meter, developed by Médiamétrie. Beacons are placed in the home and car of panel members, thus providing data on where the listening takes place. Local radio is still measured by CATI with a total of about 30.000 interviews per year.

Commercial radio is traded on the basis of





two currencies, one national and one local. The national currency is based on the panel measurement. Spots are measured and evaluated on a 1-minute basis. The number of available spots is adjusted during the campaign until the sold TRP amount is achieved.

The local currency is a hybrid solution, based on both CATI and the panel. The panel measurement is contributing with the listening volume (reach and rating), while the CATI measurement gives the distribution pattern between regions.

Source: Viaplay Sweden

G. NETHERLANDS

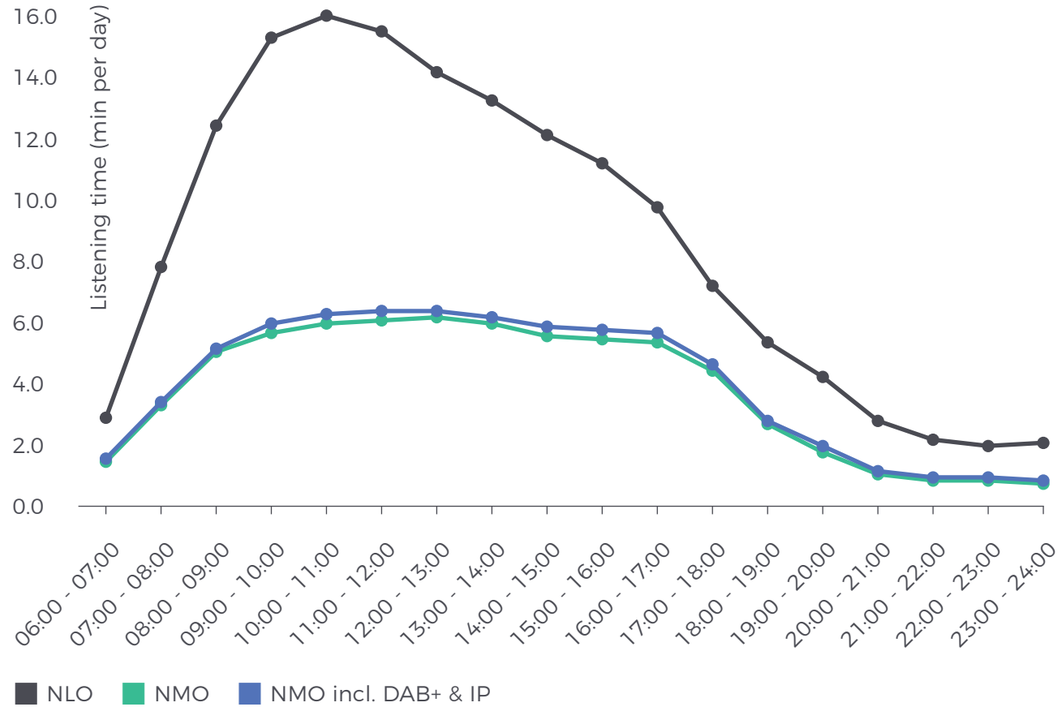
The vision behind the recent evolution of media measurement systems in the Netherlands has been based on the premise that the industry needs a holistic view of audiences across various media types, channels, formats and platforms.

▶ Total media measurement design

To address this, all main Dutch stakeholders – media owners, advertisers and agencies – joined forces to launch a request for proposal process among research companies with the aim to develop a Total Media Audience Measurement (TMAM). The implementation stage started in 2021. The resulting TMAM design incorporates a combination of sample-based and census-based audience measurement methods, passive and recall-based methodologies, as well as data fusion and modelling techniques. Ipsos and Kantar Media were appointed to design an integrated measurement system that fuels the TV, radio, print and digital trading currencies. The new approach aims at enabling advertisers and agencies to optimise the performance of media channels – both in isolation and when combined in a cross-media campaign.

In order to facilitate the measurement of audience viewing, listening, reading and browsing through a single integrated system, Nationaal Media Onderzoek (NMO) was launched as an initiative of the four organizations for media audience measurement in the Netherlands: Stichting KijkOnderzoek (SKO), Nationaal Luister Onderzoek (NLO), Nationaal Onderzoek Multimedia (NOM) and Verenigde Internet Exploitanten (VINEX). All major Dutch media operators, publishers and broadcasters are involved in these organizations, as well as the association of advertisers (bvA) and the representative organization of media agencies Platform Media Adviesbureaus (PMA). In 2026, the joint industry committee for out-of-home audience measurement Buitenreclame Onderzoek (BRO) will also join NMO.

FIGURE 05: Before and after switch to passive measurement



Source: NLO GfK Intomart (NLO, Jan – Feb 22) & Nationaal Media Onderzoek (NMO, Jan 23)

▶ New NMO listening research

The radio audience measurement in the Netherlands changed from a recall diary method (where respondents were asked to indicate retrospectively which stations they listened to every quarter hour, they reported these observations via mobile, online and paper diaries) to a passive app measurement (an app on mobile phones registering what the media consumer is listening to minute-by-minute).

After several market tests, passive electronic measurement with Ipsos' MediaCell app on a smartphone, including digital measurement with RealityMine in MediaCell+ (MC+), was introduced. The first results from new NMO Listening Research were published in February 2023. The primary measurement methodology is audio matching, while encoding (watermarking) has been additionally used for platform detection. Since February 2024, however, encoding is also used for the currency data and since 2025 watermarking is mandatory to be included in the reporting. The new measurement includes a total of 85 stations, and daily listening figures are reported weekly and based on a panel of 3.100 members. Listening by the difficult-to-recruit target group of 13-17 years old is measured by an e-diary of 200 respondents, which is afterwards integrated with MC+ weekly data.

▶ Transition and post-switch reality

During the tests and post-transition, slightly higher reach and, as shown on figure 05, significantly lower listening time has been reported. Other observed characteristics of the radio consumption under a passive methodology included: a longer morning

listening peak, people listening to more stations, and radio events having a substantial impact.

In order to facilitate a successful switch, a transition index was introduced with the objective to interpret how the former and the new figures relate. An independent audit of the methodology and the technology used was also performed with impressive conclusions giving more credibility to the new system. NMO and other industry stakeholders focused on the communication to the market to foster acceptance of the new measurement among agencies who needed to adapt their forecasting and planning models, and their advertising clients to encourage them to look beyond the perceived listening time drop and embrace the advantages of a more granular and frequent measurement. It has also been vital to support the radio stakeholders to adapt and refine their commercial policies. However, despite these transition challenges, the radio market has been growing since the introduction of the new measurement.



What is measured

The NMO Radio Audience Measurement records, on a minute-by-minute basis, which radio stations respondents from the Multimedia Panel are in contact with. This listening behaviour is extrapolated to represent the actual listening behaviour of the total population aged 13 years and older. Due to the known background characteristics of panel members, a specification of listening behaviour per target groups is also available. The results allow for the calculation of various parameters, such as the average listening time for total radio, per station, per day/time slot, etc. The listener share per station can also be calculated. This is the share of listening time a station has in a specific target group compared to the total listening volume in that target group.

How it is measured

The Ipsos MediaCell+ app uses an audio matching technique (similar to the Shazam technique) that recognises audio based on reference patterns in a database. The app compares the audio signal of a radio station with a reference signal from participating stations. This detection method is also referred to as fingerprinting, where an acoustic fingerprint is compared with that in the database of stations. This links the respondent, a radio station, and the duration of listening.

In addition to fingerprinting, encoding is also used. This technique involves sending an inaudible signal from the radio station, allowing the listening platform to be recognised. This provides insight into whether a station was listened to via FM, DAB+, internet, or another platform. At the start of the project, 18 stations were equipped with encoding, while others have been working on its implementation. As of February 2025, all stations are equipped with encoding.

For measuring digital listening behaviour on smartphones, Ipsos collaborates with RealityMine, which provides technology for



collecting detailed web, search, streaming media, and app usage on smartphones, tablets, and PCs. This technology is integrated into the MediaCell+ app and measures online media consumption on panel members' smartphones. RealityMine's technology also allows measuring radio and music listening on smartphones via headphones.

The MediaCell+ solution can capture all radio sound as long as it is audible to the human ear. Radio listening via headphones is also measured as long as it involves listening via the smartphone with the installed MediaCell+ app. What is not yet included in the measurement is headphone listening via a laptop, PC, or tablet.

To understand listening among 13-17 year-olds, an e-diary is used. During recruitment, the response among this group was found to be low, partly because both a young person and an adult in the same household had to be recruited making the process more challenging. Additionally, Apple introduced a new guideline that no longer made it possible to offer an app with tracking functionality in the App Store to those under 18 years old. This meant that young people with an iOS device could no longer participate in the listening research. For this reason, an alternative measurement method was set up for young people, ensuring that the results of both measurements, MediaCell+ and e-diary are later combined into one dataset.

Panel structure

The NMO Radio Audience Measurement is based on a panel of 3.100 panel members divided into two groups. The larger group consists of 3.100 panel members aged 18 and older, with a respect of weighting variables such as gender, age, region, education, household size, etc. The group of 200 respondents aged 13-17, weighted for gender, age and region is separately composed.

The panel for the NMO Radio Audience Measurement is recruited from various sources. In addition to NIPO-base by Kantar, other access panels are used, and letters are also sent out. The combination of recruitment and weighting ensures a continuously representative composition of the panel based on the most important socio-demographic variables related to media behaviour.

Data processing and compliance

Before a panel member's data can be admitted, compliance is tested. This means that certain conditions must be met, such as correctly installing the MediaCell+ app, carrying the smartphone as much as possible, keeping the app active, and having the microphone on.

In the NMO Radio Audience Measurement, a report file is created weekly. The compliance rules are intended to determine whether a panel member is admitted to the report. To be admitted, the respondents must be compliant on a minimum of 4 out of the 5 working days and a minimum of 1 of the 2 weekend days. In addition, a second set of rules – known as the editing rules – is applied to ensure the usability of the data.

The final step in the data process is the integration of MediaCell+ data from the 18+ panel with the e-diary data of the 13-17 year-olds. For the e-diaries, a certain level of



compliance is also required, as only those who have filled in an e-diary for all 7 days of the week are admitted to the report. Based on eight weeks of data from at least 200 e-diaries, also at the minute level, an average week is calculated. This average week is combined with the week data from MediaCell for 18+ group. A volume weighting calibrates the listening volume of the e-diary measurement to the level of the passive electronic measurement.

Impact on the radio business

Due to the continuous measurement at a minute level, the radio dataset is now much more detailed. For both media planners and program makers, it is now possible to make a more precise analysis of the listening audience. More frequent reporting also means that radio campaigns can now be adjusted and optimised during the campaign period.

As a result, all stakeholders benefit: agencies can include radio in their media planning systems directly next to the other media types, clients can better control their audio investments in comparison to other media, while radio stations can now demonstrate increased ratings, better price their inventory, and obtain more accurate insight with regards to profiles of listeners.

Audio measurement: NMO Streaming Audio Standard and NMO Podcast Standard

In addition to the Radio Audience Measurement, NMO has two other sources that provide insights into audio consumption: the Streaming Audio Standard and the Podcast Standard, both based on census rather than panel data with the objective to map listening to streaming audio and podcasts.

NMO collaborates with Triton Digital to establish these two standards, which comply with the guidelines set by the Media Rating Council (MRC) and the Interactive Advertising Bureau (IAB). Triton is responsible for collecting and processing the data. The results are published in the form of monthly rankings for both streaming audio and podcasts.

Such census-based audio measurement involves all registered, processed and reported actions on a digital device, such as a smartphone or tablet, and do not come from a sample or panel of respondents but are rather based on the entire universe. Census data also register stations that achieve too few observations in a panel study and allow these to be reliably reported. However, since the census data reports on devices rather than people, it is not possible to indicate the profile of the media consumer behind the device or to report reach.

NMO's Streaming Audio Standard covers the consumption of live (linear) audio listened to online by listeners in the Netherlands. All forms of audio on demand (such as podcasts or time-shifted listening to programs or parts of programs that have previously been broadcast) fall outside the definition. The published results are based on the Average Number of Active Streams. NMO also reports the number of Started Sessions and the Average Playback Duration of each session. The figures are based on a weekly average. Invalid sessions or sessions listened to outside the Netherlands are filtered out.

NMO's Podcast Standard maps the use of podcasts and audio on demand. It covers all audio that can be requested on demand, downloaded or streamed. Unlike the streaming standard, this does not concern the consumption of live or linear radio. Programs or parts of programs that have previously been broadcast and are later listened to fall within the definition of the podcast standard. The NMO Podcast Standard distinguishes between two classifications:

» Podcast – an audio program, usually consisting of multiple episodes, that users can stream or download and listen to at their chosen times;

» Broadcast – all on-demand audio programs that have been fully or partially broadcast live before.

The results of the NMO Podcast Standard are published based on monthly rankings. These are made based on the number of downloads or stream starts achieved in a period of four or five weeks, closely aligning with the calendar month. Invalid downloads and podcasts or audio on demand downloaded or streamed outside the Netherlands are filtered out.

Source: NMO



CHAPTER 04: BEST PRACTICE IN HYBRID SOLUTIONS

A. AUSTRALIA

In March 2023 Commercial Radio & Audio (CRA) – the commercial radio industry body in Australia – together with their measurement partner GfK launched Radio360˚.

▶ Evolution of the hybrid approach

Within the new measurement system, GfK combines data from electronic diaries, census streaming data and data collected from panels of respondents wearing GfK's MediaWatch meters. These different data sources are integrated into the radio ratings dataset.

The objectives behind Radio360˚ was to future-prove the diary measurement, to understand the differences between linear and streaming audiences, as well as to be able to use the audience insights in a more granular and regular way than has ever been possible.

The Measurement Innovation Programme on the Australian market started back in 2017 with the aim to assess different approaches to measuring radio audiences. The programme eventually led to a Super Pilot study conducted in 2019 where four different forms of data from diary, streaming, watch and phone app were collected from each individual in the sample. The results were consistent in terms of listening patterns demonstrating that future merge of the different data sets to form a more robust and evolved currency is possible. Fast forward through a covid pause, the first phase of Radio 360˚ was developed and announced to the market in 2022. The industry chose to release the results internally for the first two survey waves to give radio networks the ability to review and adapt their commercial policies. This was followed by a launch embraced by the market in 2023.

▶ Methodology and data integration

The Radio360˚ design employs GfK technologies to combine audience data collected from electronic diaries and live radio streaming data obtained from station web server logs and using the GfK Sensic tagging system. The system also calibrates the streaming data with data collected from panels of respondents wearing GfK's MediaWatch meters.

Fifty thousand surveys (80% online and 20% offline) per year are completed by listeners in geographically and demographically representative households across the five metropolitan markets.

Measurement of streaming listening over millions of connected devices is based on data taken directly from radio station websites, listening apps and server logs. These records allow to track listening patterns for individual stations as well as the entire radio market audience. The GfK Sensic Tag is a piece of code that is inserted into a station's web player and app assets. It provides the start and stop information for every call to those station assets as well as additional information like device used, browser detail, application type, operating system and geo-location of the IP.

The third type of data is the information from a 2.000 person panel of respondents wearing the GfK MediaWatch, a wearable meter that automatically captures information on radio listening when the wearer is in hearing range of a radio station. Data from the watch is encrypted for privacy and downloaded to GfK's servers daily when users recharge the watch using a wireless docking station.

▶ Roll out and next steps

Phase one of Radio360˚ has been live now since 2023 and delivers total broadcast and streaming audience figures for each radio station across the five major metro markets, giving the industry a clear picture of listening behaviour and the size of the digital opportunity.

The system also provides the capability to measure listening spikes based around special events and breaking news in addition to the existing eight radio surveys per year.

During 2024, special industry-focused reports and dashboard reporting for the radio networks only, based on the wearable data, were released. In December 2025, CRA announced the launch of CRA AudioID, a cross-network identity solution built on the foundation of Radio360˚. In 2026, GfK and CRA will look to further exploration of the data activation solution, continuing to draw on the framework and learnings from Radio360˚ and AudioID.

▶ Impact on the radio business

The method change has been successful in meeting the objective of a more granular and frequent measurement, while by opting for a hybrid approach rather than a complete measurement reshuffle the market avoided a potentially destabilizing consequence of a trend break. The transition has also enhanced ratings credibility and helped the radio industry push past the perception of diary method as outdated. The goal behind the continued modernisation is to increase revenue for the radio industry by bringing new advertisers to radio and audio and by splitting out streaming audiences to make it possible to analyse, plan and monetise them separately.

Sources: CRA, GfK Australia, Radio 360˚



B. FRANCE

Médiamétrie is the official provider of radio measurement in France. The company conducts two complementary studies on the market, based on two different methodologies:

» EAR National & Local, an audience measurement survey conducted via CATI,

» EAR Insights, a behaviour analysis based on a constant panel equipped with the electronic meter RateOnAir.

These two studies are delivered independently, each providing different indicators..

▶ Day-After Recall – CATI

The EAR National & Local study involves a substantial annual sample of 100.000 CATI interviews, representing the French population aged 13 and above. This survey collects key radio audience metrics for an average day, such as cumulative audience, share, time spent listening (TSL), and average quarter-hour (AQH). The large sample size enables detailed geographical segmentation, allowing audience data to be generated for all regions of France and 95 cities, reflecting an environment where 95% of nearly 1.000 stations are local.

Médiamétrie releases the results four times per

year for national stations and once per year for local stations. More than 85% of interviews are now conducted through mobile phone numbers.

To improve representativeness and reachability, Médiamétrie is implementing several changes:

» Since January 2026, both quotas and the questionnaire sections on awareness and listening habits have been simplified.

» From September 2026, a multimodal protocol will be introduced. Whilst initial contact will still be by phone, respondents will be able to choose how to continue the interview, using the mode with which they feel most comfortable: either by phone (CATI) or online (CAWI). This approach aims to maximise representativeness by considering individual mode preferences.

▶ Electronic Measurement – RateOnAir

The EAR Insights study is conducted with a panel of approximately 6.000 panellists aged 13 and above, all equipped with RateOnAir meters. This method uses watermarking technology embedded in the signals of radio stations, which includes both live and podcast replay content, on all local segments. The electronic measurement enables Médiamétrie to provide weekly and monthly coverages, audience accumulation week by week by location (at home or out of home, according to device connection with a beacon), and the average number of listening days. It also distinguishes between exclusive and duplicate listeners – for instance, identifying the rate of exclusive listeners between a main radio brand and its sister stations.

Encoding technology further allows analysis of listening modes for each radio brand – FM, DAB+, online streams, and podcast replays – and broadens the measurement to include online-only content such as native podcasts and web radios. This enables radio broadcasters to profile and quantify additional listeners gained through digital audio, identify the proportion of listeners consuming both over-the-air and online content, and evaluate the overall strength of their brands.

The same panel is used for out-of-home TV measurement, enabling ad hoc analysis of TV/radio co-broadcasting. It also offers editorial and marketing ad hoc analysis, such as results for a specific day or minute-by-minute audience curves.

▶ Combined currency and optimised media planning

Headphone listening presents a challenge for electronic measurement. Médiamétrie addresses this by modelling headphone listening based on data from the declarative EAR National survey, where panellists specify whether they use headphones and the device for each listening session.

Médiamétrie integrates GRPs from the CATI-based EAR survey with coverage and frequency data from the electronic EAR Insights study, facilitating data-driven and optimised media planning.

▶ Looking ahead

Médiamétrie is rolling out an advanced, smaller meter across the panel: RateOnAir v3, a connected watch capable of measuring Bluetooth headphone listening. The deployment of this device is expected to be completed by the end of 2026. The company is currently developing a mobile app to allow panellists to pair their Bluetooth headphones with the audience meter via their phones.

Médiamétrie is also researching ways to bridge the gap between panel and census datasets, with the aim of creating a common language between the digital and radio industries.

In addition, Médiamétrie is undertaking a project to transform radio measurement in France by developing a new unified currency. This initiative will combine electronic measurement with a refined declarative study, seeking to provide a single, simplified system for audience measurement whilst maintaining consistency with audience levels derived from the declarative study.

Source: Médiamétrie

C. UNITED KINGDOM

RAJAR (Radio Joint Audience Research) is the official body in charge of measuring radio audiences in the UK since 1992. It is jointly owned by the BBC and the Radiocentre on behalf of the commercial sector. RAJAR measures live radio listening via its main national listening survey and also total audio listening via its sister audio listening survey – MIDAS (Measurement of Internet Delivered Audio Services).

The digitisation of the medium has created new demands, and the survey has been continually adapted to measure all individual listening platforms – online/apps, DTV set top receivers, smart speakers and DAB as well as analogue radio (AM/FM).

▶ The methodology

RAJAR deploys a hybrid methodology comprising of three data collection components combined to produce a unique sample of over 22.000 adults per quarter recruited using face-to-face interviews:

» A 15.000 quarterly sample completes a 7-day diary, with a choice of online, mobile or paper formats – The Diary Sample;

» A continuous panel of 5.000 participants provide app-based (Ipsos MediaCell) passive listening data – The Passive Panel;

» A targeted diary panel of around 500 to boost representation of young people and selected ethnic minority groups – The Diary Boost Panel.

Because MediaCell captures a continuous record of a person's radio exposure, 7 days a week, 52 weeks a year, it is necessary to convert this large volume of data into the best representation of respondents typical weekly listening. To achieve this, RAJAR has developed a proprietary model that collects listening across several weeks to produce a virtual diary, indistinguishable from a standard RAJAR weekly diary, but with the added benefit that it delivers the best possible account of a person's typical listening across the time period. The diary remains the primary method and the predominant data source.

As in any hybrid system, it is important to calibrate to one established currency so that all stations in all areas are treated equally, regardless of panel dispersion. This is usually the largest component, which in RAJAR's case, is the standard diary.

▶ MediaCell measurement

MediaCell, as used by RAJAR, uses audiomatching to identify the stations being listened to. This takes the form of an app that is installed on the panellist's smartphone that grabs regular short samples of the ambient sound, which are subsequently compared to the programmes being aired at that precise moment in time across all the stations on RAJAR. An algorithm determines whether





there are enough matches of sufficient quality to attribute a sound sample to a particular radio station.

The RAJAR sample

The universe comprises all individuals aged 10 and over, living in private households in the UK. Although children from the age of 10 are included in the survey, published figures are for Adults 15+, unless stated otherwise. Data on respondents under 15 can only be accessed by RAJAR subscribers.

So that small stations can be surveyed, the overall diary sample is about 60.000 per year, with each respondent only participating for one week (a panel participant contributes up to 3 diaries per quarter).

The passive panel sample is 5.000 individuals (RAJAR recontacts) whom are nationally representative by geography and demographics.

The sampling is devised so that each station's sample is representative of the area it covers. The smallest sample for a station is 500 diaries over 12 months, for stations with a TSA – Total Survey Area under 300.000. The national stations report on a quarterly sample of approximately 25.000 diaries.

The interviewing process

Participants in the survey are asked to complete a listening diary for one week. They are not asked to complete the task retrospectively – instead they are asked to start recording their listening as it happens for the week ahead. Diary placement is continuous throughout 50 weeks of the year, excluding the Christmas and New Year holiday period. Only 1 respondent is recruited per household. Quotas are set to ensure the best possible demographic representation of the area.

The listenership questions

Once an individual has agreed to take part, the interviewer asks a series of questions related to the respondent's demographic details, household tenure, number of radio sets, access to digital platforms, etc. The respondent is then asked to keep a listening diary for one week, detailing for each quarter hour, which station they listened to, where, and on which platform. Only live listening is measured. The listening diary is recorded via online, paper or a mobile app. The interviewer conducts a procedure in which each respondent is asked to sort through a set of cards with the names of radio stations available in the area. This is then used to personalise the respondent's diary. The diary also comprises a self-completion questionnaire which covers media consumption including television viewing, newspaper readership, listening to podcasts, etc. At the end of the diary week, the interviewer comes back to the respondent's home to pick up the diary.

The data processing and reporting

The panel data is processed and combined with the diary data. All the diaries are scanned and the data is quality checked. The data is then weighted so that the representation of each demographic group is restored to its correct proportion in the area. Results for each station are published on their TSA every quarter, with a sample based on the latest 3, 6 or 12 months of data depending on the size of the station's TSA.

MIDAS – Measuring multiplatform and multi-device listening

RAJAR also publishes the results of MIDAS (Measurement of Internet Delivered Audio Services) Survey every quarter. It is designed to provide context and insight into how, when and where audio content is being consumed. MIDAS examines how listeners are embracing the multiplatform and multi-device offering, as well as how audio-on-demand is contributing to listening behaviour. It also reveals the activities they are involved in whilst listening, where they are listening, and who they are listening with. The results include audio types such as podcasts, live and catch-up radio, as well as on-demand music services. The fieldwork is usually carried out over two weeks with a sample of around 2.410 former RAJAR respondents (figures for Q3,2023) – adults aged 15+ completing a 7-day online diary.

Looking ahead

RAJAR is working on two distinct research and development tracks designed to enhance the resilience of the existing methodology and to extend and expand the measure of all listening beyond live radio.

Enhancement track includes:

» New measures to increase hard to reach audience placement and completion rates;

» Potential of incorporating watermarking into passive measurement;

» Effective utilisation of online listening IP data.

Extending audio listening measurement and insight track comprises:

» Extracting audio listening related data from current passive panel devices;

» Enhancing insights and measures of podcasting within the RAJAR MIDAS Audio survey.

Sources: RAJAR, The Rajar Methodology, How the Survey is conducted, MIDAS

D. CZECH REPUBLIC

Hybrid currency Radio Project

From the second half of 2024 until the end of 2026, the first phase of the Radio Project transition process for radio audience measurement is currently in place. This phase introduces a hybrid radio audience measurement dataset. The hybrid dataset integrates basic metrics from the CATI-based DAR survey with second-by-second granularity data from passive measurement.

The Radio Project currency dataset is created using data fusion, where CATI respondents serve as the acceptors, receiving detailed listening data from adMeter passively measured panellists – the donors. The pairing of acceptors and donors is based on their similarity in demographics, listening duration, and habits (e.g. listening to the same station on the same day of the week). The final dataset is then calibrated to the CATI DAR measurement results for Daily Reach and Share metrics, ensuring maximum alignment in calibrated figures for each day within the period. The data



is released quarterly, four times per year; each new quarter is added to the previous dataset to allow long-term data analysis. The results are provided to the media market through MEDIAN's new suite of analytical (KIWI) and planning (FENIX) software tools.

CATI-based DAR dataset

The respondent base for data fusion for radio audience measurement uses a CATI methodology. As of 2024, the CATI part of the Radio Project is conducted with 26.000 respondents per year, with quota sampling used for selection. Telephone numbers are generated randomly, with the first three digits predetermined and the remaining six digits generated at random. Data collection takes place continuously every day of the year, across all weekdays. Radio Project is conducted by MEDIAN and STEM/MARK.

The questionnaire consists of the following sections: basic demographics (quotas), awareness of radio stations, listening habits over the past week, listening behaviour yesterday (recorded in quarter-hour intervals),



stations listened to the day before yesterday (measured in dayparts), and listening habits three days ago (also recorded in dayparts). The questionnaire concludes with additional socio-demographic questions.

In terms of data processing, after initial cleaning and preparation, data fusion is applied to estimate listenership for the remaining four days of the week. Listening data is collected for yesterday, the day before yesterday, and three days ago — covering three days in total. To account for the remaining four days, data is fused from similar respondents who listen to the same stations but have provided information for different days. Each respondent receives data from two donors, ensuring consistency in listening patterns. Two consecutive days are fused from each donor, enabling the calculation of reach for each daypart across the entire week.

adMeter passive measurement

MEDIAN has developed and implemented a parallel passive electronic radio audience measurement system called adMeter. It is based on 2.000 panellists spread across the Czech Republic, selected to be representative based on demographic quotas, socio-economic level, and media consumption habits. The panellists are equipped with the adMeter application for Android and iOS, which measures their media consumption on smartphones and desktop devices. The application utilises multiple technologies to cover the full cross-media portfolio, including:

- Audio matching for radio and TV measurement;
- Internet usage tracking (including on personal computers);
- Application usage monitoring;
- Location tracking;
- Accelerometer data analysis.

Respondents are fully aware of the data being collected. No discrete or personally identifiable information is gathered, and any recorded audio is compressed and hashed into a distorted format to ensure privacy.

This passive cross-media data, primarily used by radio broadcasters, media agencies, and advertisers, is published weekly and made available through MEDIAN's proprietary software: KIWI for audience analysis, and FENIX for campaign planning.

Towards fully passive measurement

Further phases of the transition towards fully passive measurement have already been planned:

- 2026: A further 2.000 respondents will be added, bringing the panel to 4.000 respondents in total.
- During 2026, the hybrid dataset will continue to be produced using the expanded panel.
- 2027: A complete switch to fully passive radio audience measurement will take place, based on 4.000 adMeter panellists.

Audio measurement

Several successful pilots testing server-side measurement of podcasts, simulcasts, and webcasts using MEDIAN's proprietary measuring scripts have been conducted in collaboration with individual radio broadcasters. The collected data was linked to adMeter panel data, enabling comprehensive measurement of both linear and fragmented non-linear audio listening.

The Q4 2025 data publication is the first to include seven-day time-shifted listenership, for an initial set of channels; others are planned to follow in upcoming quarters of 2026.

MML-TGI: A complementary radio audience study

The MML-TGI (Market & Media & Lifestyle – Target Group Index) study also operates in the Czech market, offering a full set of radio audience measurement variables, including:



awareness of radio stations, listening in the past week (number of days listened, measured by dayparts), and listening yesterday (measured in quarter-hour granularity). MML-TGI data is collected via CAWI (Computer-Assisted Web Interviewing) with 15.000 respondents per year. It is calibrated to the Radio Project in terms of the Daily Reach metric. MML-TGI primarily serves media agencies and advertisers, helping them profile campaign target audiences based on consumer behaviour, lifestyle, and cross-media consumption.

Source: Median

E. SLOVAKIA

▶ MML-TGI as radio currency

The official radio currency in Slovakia is MML-TGI (Market & Media & Lifestyle – Target Group Index), a project from the TGI family, licensed by British Kantar Media. MML-TGI is conducted by MEDIAN and is based on 8.000 respondents per year, collected through a combination of CAWI (Computer-Assisted Web Interviewing) and PAPI (Paper-and-Pencil Interviewing) in an approximately 50:50 ratio.

While TGI primarily focuses on consumer behaviour, the media section of the questionnaire includes standard questions providing a detailed description of media consumption. The radio section specifically covers:

» Signal and device reception availability for radio stations;

» Listening in the past week (number of days listened, measured in dayparts);

» Listening yesterday (measured in quarter-hour granularity).

The data is released quarterly, based on a rolling half-year dataset.

Radio stations with fewer than 40.000 daily listeners are not included in the Radio Yesterday variable. Instead, these stations are merged into a combined index and published together. However, they may still appear in the Radio Last Week or Radio Reception Availability variables, depending on the number of projected respondents.

▶ Radio Project

The Radio Project study in Slovakia serves as a supplement to the MML-TGI study. An additional 4.000 respondents per year are included in the MML-TGI sample, bringing the total to 12.000 respondents. All additional interviews are conducted using PAPI (Paper-and-Pencil Interviewing). MML-TGI is calibrated to the daily reach and share metrics from the Radio Project. However, minor differences may occur, as MML-TGI accounts for two-thirds of the Radio Project sample.

▶ adMeter passive measurement

Slovakia also has a passive radio audience measurement system – adMeter – developed and conducted by MEDIAN. The system consists of 800 panellists across Slovakia, selected to be representative based on demographic quotas, socio-economic level, and media consumption habits. The panellists are equipped with the adMeter application for Android and iOS, which measures their media consumption on smartphones and desktop devices. The application utilises multiple technologies to cover the full cross-media portfolio, including:

» Audio matching for radio and TV measurement;

» Internet usage tracking (including on personal computers);

» Application usage monitoring;

» Location tracking;

» Accelerometer data analysis.

Respondents are fully aware of the data being collected. No discrete or personally identifiable information is gathered, and any recorded audio is compressed and hashed into a distorted format to ensure privacy.

This passive cross-media data, primarily used by radio broadcasters, media agencies, and advertisers, is published weekly and made available through MEDIAN's proprietary software: KIWI for audience analysis, and FENIX for campaign planning.

Discussions are ongoing about increasing the sample size and potentially transitioning to fully passive measurement in Slovakia. However, not all stakeholders in the radio market are currently involved, and no agreement has been reached. A promising new impetus for expanding the cross-media panel lies in the growing interest from print publishers and outdoor advertising providers in joining the adMeter data ecosystem.

Source: Median



CHAPTER 05: ADVANCES ON DAY-AFTER RECALL MARKETS

A. AUSTRIA

Austria is a small market with approximately 9 million inhabitants with around 70 radio stations (FM & DAB+) that are mostly regional. Due to this high fragmentation, even the stations present in multiple regions want to sell their airtime split by region for regional clients. This high level of granularity poses challenges for the radio audience measurement but these have been successfully addressed by the day-after-recall method.

▶ Established CATI method

The official survey in Austria is called Radiotest and it has been based on the CATI method since its launch in 1993. Radiotest survey is run jointly by the public and private stations. The survey measures total population 10+ with results being published twice a year for both FM and DAB+ stations. However, web radios are currently not covered.

Radiotest provides audience results (daily reach, individual quarter hours, listening time and market shares) for national, regional and local stations. The interviews are distributed equally over days of the week and time of year. The respondents are asked about their daily routine (from waking up till going to sleep) and radio consumption throughout the day in quarter hour intervals.

▶ Challenges of the CATI only method

When debating the evolution of the measurement method in Austria, the radio industry considered the challenges behind the current CATI method and the need to ensure that it accommodates the current context of shifting media habits, proliferation of smartphones and decreasing number of landlines. A switch to passive measurement was discussed, but the transition has not been approved in view of potential costs and the need for measurement stability.

To address the data collection challenges, the industry has worked since 2011 with a last random digit system to reach people on their mobile phones, and this procedure is now used for the majority of interviews. However, with the sharp decrease in the conversion rate in the field (numbers that need to be called to complete an interview), the cost of the survey has increased over the years. The completion rates have been especially low among relevant target groups (i.e. younger audience).

▶ Solution = CATI + CAWI

Following two comprehensive pilot studies conducted in 2019 and 2020, a hybrid radio audience measurement combining two methodologies: CATI and CAWI was introduced in Austria in 2022. The pilots have successfully proven that the questionnaire can also be conducted online and this collection method delivers comparable results. The market has decided on a step-by-step plan to implement the new method starting with a tender to select a provider for the 2022-2024 period.

With the start of the hybrid methodology in 2022, two companies were selected for the fieldwork: GfK Austria for CATI and Reppublika (former MindTake) for CAWI. The fieldwork and the data processing in the Radiotest are strictly separated: both field institutes upload the data on a daily basis to an independent institute responsible for monitoring the fieldwork, checking the raw data, weighting, and analysis.

As of January 2022, 10% of the total sample of 24.000 interviews were conducted online in the 14-49 target group. In 2023, the CAWI share increased to 20% of the total sample and the age group was expanded to persons from 50-69 years target (in total 4.800 online interviews in the 14-69 target group).



The main reasons why CAWI offers an efficient compliment to CATI are: high internet penetration within households, the ability to make up for CATI-deficits using web interviewing, lower cost of interviewing, better accessibility and the participation of younger target groups, as well as the transferability of the questionnaire. The combination of these two methods was also well received by the market players – advertisers and agencies.

▶ More radio stations in 2024

With the launch of 28 new DAB+ stations in Austria in June 2024, the method faced the challenge of integrating 22 of these new stations into the Radiotest questionnaire (increasing the list of stations presented to respondents to a total of up to 43 stations). However, neither in the case of CATI nor CAWI did this longer list result in any issues, whether in terms of interview duration or drop-outs.

Source: RMS Austria

B. GERMANY

The basis for measuring radio listening in Germany is the day-after recall CATI method, which includes approximately 66.000 interviews every year conducted in two waves. This study is managed by the joint industry committee agma, with fieldwork carried out by several research organisations. The ma Audio methodology provides accurate and reliable audience figures for the German radio market, which is highly fragmented, with around 500 radio stations – both public and private – the vast majority of which are available only on a regional basis (excluding online distribution).

The launch of digital terrestrial broadcasting (DAB+) in 2011 introduced national stations to Germany for the first time. Following this, a methodological adjustment of the reception modes was implemented. The method has been continuously developed and is now maintained through the ATB (see below). While the penetration of digital radio receivers was initially low, it has since increased to nearly 40% of the total population (German-speaking population aged 14 and over), as reported in ma 2025 Audio II.

In 2024, a working group within agma focused extensively on how the use of CAWI could validly contribute to the overall sample size in the future. A methodological feasibility study, with a sample size of more than 10.000 online interviews, provided a solid foundation. Following further optimisations, the project received approval from agma's technical commission. As a result, in 2025, 8.000 CATI interviews with 14- to 49-year-olds were replaced by CAWI. In 2026, the number of CAWI interviews was increased by another 2.000 interviews with 50- to 59-year-olds.

▶ ma IP Audio

In recognition of the growing importance of online audio listening, agma introduced a new report, ma IP Audio, in 2014. This study provides what the organisation refers to as



"technical reach." It indicates the volume of internet audio streams accessed, derived from census measurement for participating publishers. ma IP Audio was thus a first step towards a convergent radio currency.

ma IP Audio is based on log files generated by streamed audio sessions and is open to all forms of online audio. This includes simulcasts of radio broadcasters as well as other types of audio, such as web-only channels, music streaming services, radio aggregators, and user-generated radio services.

In the latest report, ma 2025 IP Audio IV, 84 publishers and 1.674 channels participated, representing both advertising-supported services and those without advertising. The number of publishers and channels within ma IP Audio continues to grow.

ma IP Audio currently reports on a quarterly basis, providing metrics such as average sessions per week, per two-week period, and per month; average session length; total listening sessions (a product of sessions and average listening time); and average session length per quarter. Its strength lies in the precision of the census-level data it produces, offering an accurate account of listening activity in the German market. However, unlike the traditional ma Radio study, ma IP Audio does not include a mechanism to apply demographic information, such as age or gender, to the listeners behind the streams.

The path to a radio convergent currency in Germany: ma Audio

The next step for the industry was the development of a new survey named ma Audio. This study is based on three pillars: ma Radio, ma IP Audio, and a supplementary component covering all radio distribution channels (FM, DAB+, Internet, cable, and satellite): the audio diary study – Audio Tagebuch (ATB). The first edition of ma Audio, combining these three components, was published in the summer of 2015 and has firmly established itself as a recognised study. In a rolling process, ma Audio data is published based on two ma Radio waves.

Regarding web radio usage, the audio diary survey records the socio-demographic profiles of around 18.000 participants from the last four survey waves. In addition to their daily activities (e.g. sleeping, driving, working, etc.), respondents record, over 14 days, which web radios they listened to every quarter of an hour on those days and which devices they used to access the stations. agma has developed a model in which the personalised data from the diary survey is projected onto the ma IP Audio log file data as part of a data modelling and fusion process. The information about how many people are listening, for example via smartphone, combined with data on device usage throughout the day, leads to an estimated calculation of how many listeners are tuning into a station online. Once this information is transferred to ma Audio, a combined range of broadcasting and streaming can be calculated for each participating station. The goal is to create comparable performance values for programming and advertising across broadcast and online channels, including widest audience (users in the last four weeks), weekly reach, and daily reach (Monday to Friday/Saturday/Sunday). The growing DAB+ usage of the test subjects is also transferred from the ATB.

This hybrid methodology brings the accuracy of digital data collection into the scope of Germany's radio audience measurement, allowing audio sales companies to identify not only their broadcast reach but also the incremental reach delivered by IP-enabled devices. The system offers metrics trusted by the market while also providing flexibility in the sales models that can be applied to each portion of the inventory. Online audio may be sold alongside broadcast as a traditional radio product, or it may be identified separately and sold under a digital paradigm.

ma Podcast

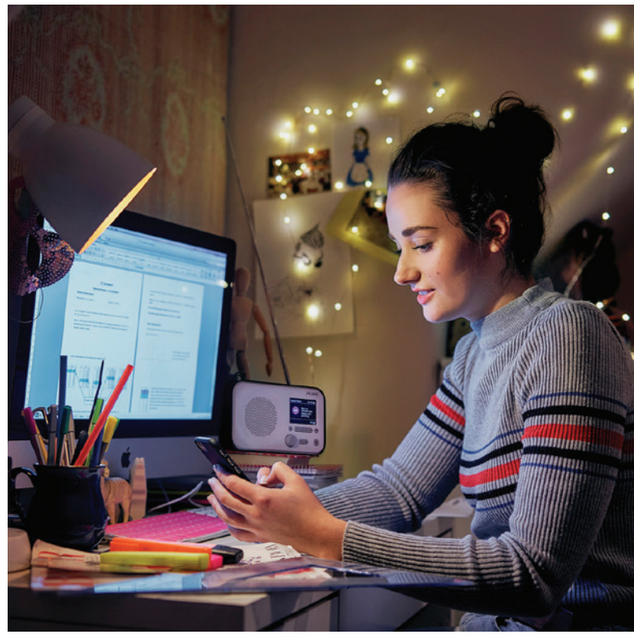
The ma Podcast is a cross-genre, independent study that has provided comparable technical usage data for podcasts in the German market since December 2021. The ma Podcast methodology is based on an analysis of server log files. For this purpose, log files of all podcasts participating in the study are sent by the hosting platforms to an independent service provider commissioned by agma, where they are verified and processed to the central identification unit "agma valid downloads." This unit is based on the "download" definition outlined in the IAB podcast measurement guidelines.

The core metric of agma's ma Podcast reporting is the monthly value of "valid downloads" per podcast. Further filtering is available by publisher, including classification of podcasts by category or as ad-supported/ad-free. In the summer of 2024, an additional KPI was introduced, which measures the performance of episodes released during the respective analysis month.

Since June 2023, the log file data has been supplemented with information on podcast usage and the sociodemographic profile of podcast listeners. This data set includes respondents aged 14 and above who have listened to podcasts in the last four weeks. The modelling of podcast usage is based on CAWI survey data. The core of the survey involves a listing of the podcasts respondents have listened to in the last four weeks. Respondents select podcasts from a pre-defined list or enter them manually. Detailed questions about podcast listening occasions are asked for each podcast title.

The survey results are then combined with the available technical measurement data for the corresponding period from ma Podcast. A report, published for the first time in November 2024, combines data from the most recent surveys, covering a total of 12.288 participants. This data is accessible through an online dashboard called the Target Group Explorer. The latest survey with 6.172 participants was conducted in winter 2025, so new information about target groups will be available in spring 2026. Further surveys are planned.

Sources: agma, ma IP Audio, ma Radio, ma Audio, ma Podcast



CHAPTER 06: ADVANCES ON DIARY MARKETS

A. BELGIUM

Belgium's official radio measurement method has been diaries since 2002. The method is being improved with every new tender. But a major overhaul for radio, under the CIM ONE framework, is in the pipeline with rollout targeted for Q1 2027.

▶ Past PPM tests

In addition to the official diary measurement, there were several private test initiatives – outside of the national joint industry currency – involving electronic PPM measurement. In 2003, Belgium became one of the first countries to introduce a PPM panel, with TNS Media under licence from Arbitron. PPM has not been used on a commercial basis in the country. It was used – primarily internally – until May 2015 in the north of the country to deliver insights into programming and product development. The PPM testing was discontinued in 2015 for several reasons, mainly cost related, as the devices would have to be replaced, requiring a major new investment. Also at the time there were less partners involved which would increase the fixed cost and as the measurement was not used for commercial exploitation, the additional investment was hard to justify economically. Sales houses in the north of the country however looked for a successor to the PPM and issued a request for proposals in 2015. The requirements included a possibility to measure radio and TV, via a panel of 1.000 individuals, and audio-matching for non-participating stations. Both Ipsos and Kantar TNS submitted a proposal. None was selected, however, for the same reasons as before, mainly the large additional investment required. On top of financial considerations, technical challenges involved a battery drain on the smartphone, and other difficulties with smartphone microphones and in-car listening. The project was put on hold for a few years. A new request for proposal for official radio audience measurement was issued in 2017. However, at the time CIM – the Belgian joint industry committee (JIC) favoured a continuation of the improved diary system provided by GfK as of 2018.

▶ Current measurement landscape

The Belgian radio market has continued to use a diary method for its audience measurement. Paper, online as well as mobile e-diaries are used in a continuous survey with the publication of three quarterly waves of 8.000 observations per year. In terms of recruitment, 50% of respondents are recruited face-to-face, 30% via online access panels, and 20% via a random digit dialling. The reference population is all individuals aged 12 and over residing in Belgium.

Since 2020, CIM has been separately measuring and publishing traffic data from live radio streams over IP. In 2025, this measurement has been further extended to broadcaster's podcasts using a top 100 podcasts ranking published monthly.

▶ From cross-media measurement innovations to CIM ONE

In 2024, a Flemish cross-media measurement project called XMM has been launched. The project involved a panel of 1.500 individuals and used passive measurement technologies of Ipsos MediaCell and RealityMine. The aim has been to establish a single source measurement system for video, audio and online media. The panel has been managed in close collaboration with CIM acting as a project manager for the initially Flemish pilot to be extended into a national CIM project in the future.

The XMM panel has been the first step in the new CIM ONE strategy, aiming to provide a consumer-centric and hybrid measurement by bringing panel insights, survey data, and



various census data sources together to make the most of all the methodologies. The objective has been set to be able to provide a holistic view of media consumption, and to either reinforce or replace some of the current CIM measurement studies.

▶ CIM ONE for audio

Historically, CIM's various media studies – covering press, TV, radio, and out-of-home – were designed in silos. In response to the increasing demand for cross-media and cross-platform insights, the new CIM ONE framework aims to integrate all of these into a single hybrid, consumer-centric system. The core idea is to measure audiences through a unified panel, combine this with big data sources, and report all media together against one virtual population representing all of Belgium.

The measurement infrastructure centres on "one panel," consisting of the existing TV panel that is being upgraded with router meters to capture digital consumption, and a new smartphone panel capturing TV, radio, and online consumption. For radio specifically, this introduces passive measurement for the first time in Belgium, which can be used as a new input for radio audience modelling within the CIM ONE framework.

The new radio methodology will combine several components: passive minute-by-minute listening data, watermarking to distinguish between platforms (FM, DAB, and online streams), census-level online data from broadcaster player tagging and server log files, and a streamlined diary-based calibration survey of 8.000 interviews per year (reduced from 24.000). The modelling process involves three steps: calibrating online volumes against census data, reconstructing quarter-hour data to maintain continuity with the existing currency, and integrating the results into the broader CIM ONE virtual population.

Three tiers of output are planned. Raw passive data will be delivered directly to broadcasters for internal programming decisions, followed by weekly calibrated data also for broadcasters only. The official market currency will be published three times per year, based on rolling averages of three to four months of weekly data. Beyond preserving market stability, the new system expands scope from total radio to total audio, bringing in streaming platforms and podcasts, with platform-level recognition enabled by watermarking, and will allow integration with other media for a comprehensive cross-media measurement. Full rollout is targeted for Q1 2027.

Expected challenges include measuring small local stations, podcast granularity, and ensuring accurate watermarking, but pilot tests to evaluate the scale of these are underway.

Source: CIM

B. FINLAND

Finnpanel Oy measures TV viewing and radio listening in Finland. National Radio Survey (KRT) is a joint audience research project of the public broadcasting company – Yleisradio (YLE) and the commercial radio stations. It serves as the currency study of the radio industry.

▶ Methodology of KRT

Radio listening is measured using diaries. The respondent can choose between a paper diary or an online diary. The respondents mark their radio listening in the diary that identifies the station and the listening time. They are also asked to mark the listening place (home, work, car, other). The annual national sample size is approximately 18.000 diaries.

The reference population for KRT is 9+ years old Finnish and Swedish speaking population excluding the Åland islands. Panel members are recruited by phone, while people whose telephone number is not available (approximately 1/3 of the population) are contacted by mail. The sample is selected by using a random sample from the population register with quotas for municipalities, gender, and age groups.

The diary measures listening throughout the week and there are approximately 52 waves each year, which enables KRT to provide data about radio listening evenly throughout the year. The data is published monthly on KRT Online (online reporting system). The data is also updated monthly in AudioPlanner (campaign planning software).

▶ Subscribers

The main subscribers of KRT are the public broadcaster and the commercial radio stations, represented by RadioMedia. Media agencies can access the data via the subscription of Marketing Finland. The implementation and quality of the survey is monitored by a joint industry committee which consists of members from YLE, RadioMedia and Marketing Finland.

▶ Future plans

Plans for the near future include the development of a mobile application that will provide more accurate data on audio listening and cover all audio formats and platforms. The mobile application was tested in 2025, and its implementation is planned to continue in 2026.

Source: RadioMedia



CHAPTER 07: DIGITAL AUDIO MEASUREMENT

Chapters 03–06 explore best practices in innovating traditional radio audience measurement (RAM) methodologies. This chapter examines the challenges associated with audio measurement in greater detail, along with examples of digital audio measurement initiatives from different markets. The following chapter will explore podcast measurement and its unique characteristics.

A. CHALLENGES

▶ Fragmented audio landscape characterised by multiple measurement methods

The online audio industry comprises a wide variety of publishers, characterised by different distribution and monetisation strategies. Broadly speaking, publishers active in the online audio industry can be classified into three groups: online radio, which includes live simulcasts of terrestrial stations, brand extensions and other digital properties of broadcasters; online radio aggregators; and on-demand music/audio services, including video platforms and podcasting services.

Furthermore, understanding and analysing the audiences of online audio is currently achieved through a combination of research methods, including sample-based and census-level measurement techniques, as well as hybrid methodologies that combine the two.

Additionally, new data infrastructure and technologies allow publishers to make the most of their own online data, which combined with attribution models and tools can provide insights into their performance.

Given this complexity, digital audio measurement is a source of many business and methodological debates, as there seems to be a lack of consensus on what to measure and how to measure it.

▶ Quantifying audiences

Quantifying the amount of online audio listening is problematic for three reasons.

Firstly, there are myriad different definitions possible, and these may include all or only part of the types of service outlined above. Furthermore, a significant volume of online video viewing, such as music videos on YouTube, can also be classified as online music streaming.

Secondly, continuous and standardised market-level measurement is evolving and the data available is typically fragmented. To estimate the scale of total online audio listening depends on stitching together a range of different reports and studies, with different methodologies.

Thirdly, subscription or registration-based audio streaming companies do not publish consumption statistics. And while such services track various statistics about their users for themselves and their clients, they do not necessarily have any commercial interest in participating in market-level research.

▶ Capturing audiences across all platforms and devices

The primary challenge in measuring online audio is determining – and implementing – a technical solution that covers the medium in its entirety. Terrestrial radio simulcasts, online radios, aggregators, on-demand services, catch-up platforms, podcasts, music video players and audiobooks, to cover just some of the array of publishers in online audio, employ different software and technologies to deliver content, some of which is live and some time-shifted. Individual audio channels, for example terrestrial radio online simulcasts, may also be accessible via several platforms.

Moreover, a wide variety of business models and geographical restrictions dictate how content is consumed and monetised. Reaching an agreement between these different companies on a common measurement methodology for all audio can be highly challenging, let alone designing the technical infrastructure required to deliver such audience data.

B. METHODOLOGIES

▶ Two measurement approaches: single publisher versus market-level research

Measurement and analytical methodologies fall into two categories: the first is restricted to a single publisher's audience, while the second provides insights across a market, encompassing multiple publishers.

On the one hand, publishers can leverage a range of tools and services to analyse the streaming of their own content, with these data being used for increasingly sophisticated targeted advertising. Several companies offer comprehensive suites of tools to deliver audio to listeners and analyse performance in real time.

On the other hand, independent, market-level research potentially provides a more holistic view of the market, enabling comparisons between different publishers and analysis of the devices used to access audio content.

▶ Single publisher analytics

Major audio platforms such as Spotify, Apple Music, YouTube collect first-party user data. These platforms use server-side tracking to log user activity, including plays, unique listeners, listening duration, and completion rates. They also capture demographics, location, device type, and user behaviour. These streaming analytics provide granular, real-time data on listener behaviour, including engagement and demographics. However, the data is platform-specific and cannot be compared across services. Additionally, off-platform listening (e.g. podcasts downloaded for offline use) cannot be tracked, and platforms do not typically share listener data with third parties.



Radio broadcasters can also utilise their own first-party data to analyse and sell their online audio inventory. The advantages of this approach include relatively low cost, immediate availability of data, and autonomy, as the publisher does not need to reach an agreement with any other actors on the market. However, the disadvantages include potential non-standardisation of data and reporting across the market, which may lead to confusion among buyers, as well as the absence of a third-party auditing or accreditation organisation to validate the publisher's figures. Furthermore, the data is likely to provide insights only into stream starts and durations, and unless the publisher requires some form of user registration, no demographic information can be appended. This limitation may be mitigated by inferring audience profiles – either by referencing a radio station's offline audience (in the case of simulcasts) or through the use of third-party demographic matching solutions.

▶ Measuring the audience at market level

The first model for measuring audiences at market level involves adapting the existing single-source RAM methodology to differentiate between online and offline listening.

A second model, which is more targeted to online audio listening specifically, involves third-party measurement solutions with different methodologies available on different markets.

The most technically ambitious approach to measuring online and offline audiences together, in order to produce a convergent currency, takes the form of hybrid measurement methodologies, which combine traditional sample-based and census-level techniques.

▶ Sample versus census-based methodologies

The use of sample-based methodologies, such as day-after recall and panels, allows for the estimation of reach and time spent consuming media, as well as the attribution of basic demographic information. Census data is (theoretically) a comprehensive and exact account of all measurable consumption behaviour across selected publishers and channels. However, linking that consumption data with demographic or other information to build detailed consumer profiles remains a challenge.

Sample measurement, in which a statistically representative subset of the population is identified and recruited to participate, forms the basis of radio audience measurement. When measuring online usage, where panel methodologies are typically employed and consumption is often fragmented, even large panels face limitations in accurately measuring smaller and more targeted audiences.

Census-level data, sometimes referred to as technical or return-path data (RPD), theoretically provides an accurate account of total consumption, potentially across all devices. While the elimination of the need to extrapolate data to the wider population is an advantage compared to the limitations of sample-based data, census-level data only reveals what was consumed. It provides little insight into the characteristics of the people actually listening to the audio content.

To achieve a complete understanding of both who was consuming content and what was consumed, census-level data derived from audio streams needs to work alongside a panel or another sample-based methodology that can provide demographic information, such as age, gender, and other attributes.

FIGURE 06: A comparison of capabilities and limitations of sample and census data

SAMPLE DATA: USER CENTRIC (respondent level data reflective of users' behaviour)	
⊕ **CAPABILITIES**	**LIMITATIONS** ⊖
» Reach estimates (unduplicated) » Frequency estimates (unduplicated) » Demographic profiles » Cross-platform behaviour at household/ individual level » Replicates of traditional RAM metrics	» Accuracy decreases for small and niche content » Potential bias due to sample composition

CENSUS DATA: SITE CENTRIC (exact account of all online activity)	
⊕ **CAPABILITIES**	**LIMITATIONS** ⊖
» Total usage (contacts, user interactions, etc.) » Technical information about all measured streams (e.g. device type, operating system, IP address, time of day, etc.) » Accurate measurement of small and niche publishers and content	» No accurate estimate of unduplicated reach or frequency » No demographic or other forms of information about users

▶ Technical standards for digital audio measurement

The Media Ratings Council (MRC) and the Interactive Advertising Bureau (IAB) have established technical standards to guide organisations in the audio industry in their measurement efforts, with the objective of enhancing transparency and comparability.

The MRC's Digital Audio Measurement Standards provide guidelines for accurately measuring digital audio ads and content, including streaming and downloads. Key elements include defining audio ad impressions based on client-side activity, filtering invalid traffic, tracking user engagement, and ensuring transparency in reporting. These standards cover ad delivery, session measurement, cross-platform consistency, and audience metrics.

The IAB has developed specific guidelines to address the unique aspects of podcast measurement, which will be covered in the following chapter.

Source: Media Ratings Council, MRC's Digital Audio Measurement Standards

C. MEASUREMENT SOLUTIONS LANDSCAPE

Each methodology for measuring audio audiences has its own strengths and limitations. This report maps the landscape of measurement solutions across three main categories: adapted RAM methodologies conducted by national radio JICs, third-party online audio measurement solutions, and platform usage reports. An overview of each category and its use cases is outlined below.

▶ Innovations in RAM methodologies to incorporate audio

Chapters 03–06 of this report highlight examples of best practices and innovations in adapting existing RAM methodologies to measure both radio and audio listening. The strategies used vary depending on the type of RAM methodology in place in a given market. The solutions and tactics applied to integrate audio range from introducing platform differentiation in recall methodologies and refining encoding for automatic platform detection in passive methods to supplementing sample-based methodologies with census-based data sources.

Detailed overviews of various measurement landscapes are provided in the respective sections dedicated to each market. Below is a compilation of several examples of adaptations applied to RAM methodologies to account for audio listening:

» RAJAR in the **UK**, historically a diary-based market, includes platform identification (AM/FM, DAB, online/app, and DTV) as a question within the diary that panel participants are asked to complete. This allows the organisation to break down listening per station by platform. The diary method is supplemented by two additional data sources, including the passive Ipsos MediaCell method. More details on the RAJAR methodology can be found in Chapter 04 (pages 33-35).

- The Radio360° RAM design in **Australia** employs GfK technologies to combine audience data collected from electronic diaries with live radio streaming data obtained from station web server logs using the GfK Sensic tagging system. The system further calibrates the streaming data with data collected from panels of respondents wearing GfK's MediaWatch meters. More details on the Radio360° methodology can be found in Chapter 04 (pages 30-31).
- In **Germany**, a day-after recall market, a CATI-based radio measurement methodology is complemented by research based on log files generated from streamed audio sessions. These two modes of data collection are further supplemented by a model in which personalised data from the diary survey is projected onto the log file data as part of a data modelling and fusion process, allowing for a combined reach figure of broadcast and streaming for each participating station. More details on the agma methodology can be found in Chapter 05 (pages 41-43).



- For the hybrid radio measurement market in **France**, Médiamétrie measures audiences and consumption of live broadcast radio, radio streams, and catch-up podcasts, on both studies: EAR > National & Local (CATI-based) and EAR > Insights (meter-based study). On the meter-based side, refinement of watermarking enables separate analyses of each listening mode for a radio brand – FM, DAB+, stream, and podcast – and expands the measurement scope to include exclusive online content, such as original podcasts and web radios. More details on the Médiamétrie methodology can be found in Chapter 04 (pages 31-33).
- In the passively measured PPM markets, Portable People Meter (PPM) technology can track live radio and streaming audio. Additionally, software development kits (SDKs) can be embedded in streaming apps and websites to add census data component by enabling audience measurement organisations to identify and track user access to audio streams or other content delivered online.
- In the **Netherlands**, a market that has recently transitioned to passive measurement for radio, Ipsos collaborates with RealityMine to measure digital listening behaviour on smartphones. RealityMine provides technology for collecting detailed data on web usage, search activity, streaming media, and app usage across smartphones, tablets, and PCs. This technology is integrated into the MediaCell+ app, which measures online media consumption on panel members' smartphones. In addition to the Listening Research, NMO – a market JIC – in collaboration with Triton Digital, employs two other techniques that provide insights into audio consumption: the Streaming Audio Standard and the Podcast Standard. Both techniques are based on census rather than panel data, with the objective of mapping listening to streaming audio and podcasts. More details on the NMO methodology can be found in Chapter 03 (pages 24-29).

▶ Third-party online audio measurement solutions

In addition to market-level audio-enriched RAM measurement solutions, regular rankings of digital audio services and in-depth market analyses exist in several markets. The most well-known example is Triton Digital's Webcast Metrics and their Streaming Rankers, available across various regions. These solutions can also exist within a single market. For example, in France, a partial ranking of online radio channels is published by ACPM, the organisation responsible for certifying census data, with the aim of publishing rankers based on comparable data.

While these solutions work across multiple publishers and platforms, they tend to have limited visibility into closed platforms like Spotify and Apple Music.

Webcast Metrics by Triton Digital

Triton Digital's Webcast Metrics is an industry-standard service for measuring online audio streaming, providing publishers with detailed insights into their audience's behaviour across various parameters such as time of day, location, device, and listening platform.

Webcast Metrics employs a census-based approach to capture every listening session across any player and device. The data collected enables publishers to gain insights into how and when listeners are consuming the content, trends over time, real-time listening, and more.

The service utilizes two primary methods for data collection:

- Content Delivery Network (CDN) Data Collection: This method is most commonly used and involves gathering data directly from the servers that deliver audio content to listeners. By analysing server logs, Webcast Metrics can determine metrics such as the number of listening sessions and total listening hours. The server logs can come from Triton's own CDN or a publisher's third party CDN. In the case of third party CDN's, Triton transforms the raw data into a consistent format with consistent and comparable measurement, regardless of the initial source, format, or other intricacies with the data.
- Listener Tracking: In addition to CDN data, Webcast Metrics can incorporate client-side data collection to track individual listener behaviour more precisely. This involves using tracking mechanisms within the audio players to capture data on how listeners interact with the content, providing insights into metrics like average time spent listening and unique listener counts.

Once data has been collected, invalid or non-human traffic is filtered out and measurement crediting rules are applied, as documented in the Webcast Metrics description of methodology. Through ongoing machine learning and R&D from Triton's Data Science team, they have established a series of rules to flag anomalies in the data and separate non-human traffic from real listening that is identified and counted.



Once the data is processed, Webcast Metrics allows publishers access to performance insights through its user interface, API, and automated reports. Key consumption metrics include:

- Average Active Sessions (AAS): The average number of listening sessions that are active within a specific time period.
- Session Starts (SS): The number of times a stream was requested and played for at least one minute.
- Total Listening Hours (TLH): The cumulative amount of time that listeners have spent streaming the content.
- CUME: The cumulative number of unique listening agents/identifiers with at least one active session of at least one minute in the reported time period.
- Average Time Spent Listening (ATSL): The average duration that each session was streamed.

Public streaming rankers by Triton Digital

In addition to private reporting for individual publishers, Triton Digital provides public streaming rankers, which offer industry-wide insights into the top-performing digital audio publishers and streaming networks. These rankers, available on Triton Digital's website, cover various regions. Publishers are ranked Globally, as well as in three distinct regions: US, LATAM, and EMEA.

The Global Publisher Ranker, powered by Webcast Metrics, verifies the quantity of streams without qualifying where they are being consumed. The regional rankers quantify consumption based on listener location. All metrics within Triton's Rankers include both ad-supported and non-ad supported listening. Sales Networks include both owned streams and the streams related to network affiliations. Ranker data only includes Triton clients that participate for the full month for which the ranker is being released.



Move towards hybrid measurement

Due to the complexities of measuring streaming listening with traditional research methods such as panels and surveys, server log data can be used to enhance that measurement. Each method and data source has strengths that make up for the other's limitations. Census data from streaming log measurement includes every online listening session so it does not have concerns that panels and surveys can have with sample sizes or data collection challenges.

While server log data provides detailed listening information and can accurately quantify the total amount of online listening, it also has limitations. Server logs can identify devices, players, and listener location, but do not on their own identify unique audience reach or the listener's demographic profiles. To address these gaps, panels and surveys are used to estimate audience reach, frequency, and demographics. This combination allows for more accurate and detailed insights. It can also enable measurement and reporting of smaller stations, specific time periods, or granular geographical segments that panels or surveys are unable to provide.

By integrating server log data with panels and surveys, Triton aims to collaborate with other measurement partners and contribute to a more accurate measurement system that accounts for the complexities of online audio consumption. This hybrid approach is designed to overcome challenges such as fragmented listening habits, diverse device usage, and the limitations of IP address-based identification. The integration of both methodologies enables broadcasters to gain a more comprehensive understanding of their audience, ultimately benefiting both advertisers and listeners. Triton Digital focuses on providing accurate and ready-to-use server log data that can be incorporated into hybrid measurement systems across different markets.

Sources: Webcast Metrics Methodology, Streaming Metrics, Hybrid Audio Measurement

ACPM Web Radios Ranking

ACPM provides radio streams and web radios sessions and duration ranking each month: participating publishers provide streaming data from their own web analytics tools, which is then verified and audited against raw log file data extracted from CDNs (Content Delivery Networks). The ACPM figures do not constitute an advertising currency. More details on radio and audio measurement in France can be found in Chapter 04 (pages 31-33).

Source: ACPM Classement des Radios Digitales

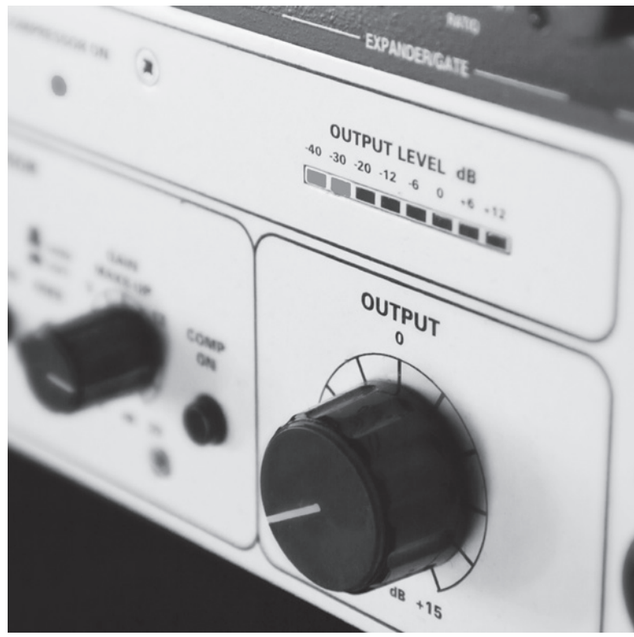
Platform usage reports

The prevalence of online audio listening is reported in several markets through studies analysing platform, device, and service usage. In some cases, these studies are conducted by the national radio audience JIC, while in others, they are published by private research organisations. Examples of the former include RAJAR's MIDAS in the UK and Médiamétrie's Global Audio in France, while an example of the latter is Share of Ear by Edison Research in the US.

These reports provide insights into the scale of audio consumption and enable comparisons across different devices and platforms, such as broadcast radio and various forms of online audio. When conducted over time, they allow for the analysis of trends and evolving patterns of behaviour.

They use well-established and trusted research methodologies, predominantly diaries, questionnaires, and interviews. However, these sample-based reports generally lack granularity, offering overall listening figures by platform but providing limited data on individual stations or publishers. This lack of detail reduces their relevance as an audio advertising currency, as they are usually not suitable for media planning and buying.

Platform usage reports may be published regularly or on a more ad hoc basis, and the frequency of reporting is usually low. Furthermore, they rely on declarative methodologies using small samples, which contrasts with the passive, continuous, and big data methodologies used to measure other forms of digital media consumption. Generally,





such reports do not include data on individual channels, though they may offer insights into the audience size of the largest players in the market, such as Spotify and YouTube.

MIDAS by Rajar in the UK

RAJAR in the UK publishes the results of MIDAS (Measurement of Internet Delivered Audio Services) Survey every quarter. It is designed to provide context and insight into how, when and where audio content is being consumed. MIDAS examines how listeners are embracing the multiplatform and multi-device offering, as well as how audio-on-demand is contributing to listening behaviour. It also reveals the activities they are involved in whilst listening, where they are listening, and who they are listening with.

The results include audio types such as podcasts, live and catch-up radio, as well as on-demand music services. The fieldwork is usually carried out over two weeks with a sample of around 2.410 former RAJAR respondents (figures for Q3,2023) – adults aged 15+ completing a 7-day online diary.

Source: MIDAS

Global Audio by Médiamétrie

TThe Global Audio study by Médiamétrie in France is designed to deliver audio consumption across various formats, platforms, and listening contexts. It provides insights into reach, overlap, audience profiles, and listening shares, as well as the context such as location, devices used, and times of listening. The study covers a wide range of audio consumption, including: live radio (FM/DAB+ and live streaming), podcasts (both catch-up radio and original podcasts), audiobooks, music streaming services (both free and subscription-based), music streaming on video platforms, and personal music libraries.

The Global Audio study aims to provide a comprehensive overview of audio consumption habits in France. It helps industry stakeholders understand audience behaviours, track trends in digital audio consumption, and assess the impact of new platforms and technologies on listening habits. The study is conducted online using the CAWI method with a sample of 4.000+ individuals aged 15 to 80 years, representative of the French population based on key socio-demographic criteria.

Source: Médiamétrie – Global Audio

Share of Ear by Edison Research

Share of Ear, published since 2014, is a syndicated quarterly dataset created by Edison Research that measures all daily audio consumption in the US. It tracks listening across all platforms, including AM/FM radio, streaming services, podcasts, owned music, YouTube, SiriusXM, audiobooks, and music channels on television, in any location and on any device.

Share of Ear is a quarterly audio listening diary survey that records the audio habits of 1.000 respondents over a 24-hour period. The majority of participants use an online diary, while some complete a paper diary. Respondents self-report their listening details for every 15-minute period throughout the day. The survey provides insights into what Americans aged 13 and over are listening to, how much they listen, when and where they listen, and which devices they use.

Demographic information collected includes listener age, gender, income, employment status, and the presence of children in the household. Additional variables in the dataset include the model year of the respondent's primary car, political affiliation, premium audio subscription status, ownership of smart speakers, and more.

Source: Edison Research - Share of Ear



CHAPTER 08: PODCAST MEASUREMENT

A. CHALLENGES

Measuring podcast performance is inherently complex due to the unique characteristics of the medium. Unlike other digital media, podcasts are digital audio files that are listened to either by downloading the file for later listening (downloaded), or by listening while the file is being downloaded (progressive download). This limits real-time data collection on listener engagement and ad consumption.

Metrics like downloads provide only a partial picture, as they do not indicate whether episodes are fully consumed (no time spent listening), partially played, or skipped. Additionally, reconciling data across platforms and devices presents a significant challenge. Podcasts are consumed on a diverse range of apps and hardware, each with its own approach to data collection.

Some devices, like Apple Watches or offline players, do not transmit user behaviour back to servers, complicating measurement efforts. Furthermore, podcast episodes are often consumed weeks or months after release, requiring ongoing monitoring of historical downloads to capture the medium's time-shifted nature.

Beyond server log analysis, listener surveys provide critical qualitative insights using extensive interviews of podcast listeners. These surveys gather data on show preferences, weekly reach, and demographics, complementing quantitative metrics. However, they rely on representative samples and self-reported recall, which can introduce bias and underrepresent niche or emerging audiences.

Another significant factor is the dual nature of podcast advertising: baked-in ads, which are permanently embedded in episodes, and dynamically inserted ads, which are tailored to specific listeners or times. These distinct delivery methods require different measurement approaches. Additionally, distinguishing legitimate downloads from anomalies, such as bot activity or unusual spikes, is essential for maintaining the integrity of metrics.

The rise of video podcasting has further fragmented measurement, with platforms relying on fundamentally different metrics: YouTube prioritises *watch time*, traditional podcast platforms count *downloads*, while Spotify reports *plays*. These metrics are not directly comparable, making it difficult to assess total reach, engagement, or performance across formats. As a result, no unified industry standard yet exists for measuring podcast consumption consistently across both audio and video environments.

Finally, podcasts often have global audiences, yet many measurement systems focus on specific regions. Understanding the reach and behaviour of international listeners adds further complexity to measurement efforts.

Despite these challenges, industry standards like the IAB Podcast Measurement Technical Guidelines provide frameworks for consistent data filtering, anomaly detection, and reporting, helping advertisers and creators better understand the medium's impact. By combining quantitative metrics from server logs with qualitative insights from surveys, podcast measurement offers a multifaceted view of listener engagement.

Source: IAB Tech Lab - Podcast Measurement Technical Guidelines

B. METHODOLOGIES

▶ Download-based measurement

The IAB Podcast Measurement Technical Guidelines 2.2 defines content, ad, and audience metrics in the context of downloaded podcasts whether saved for later listening or listened to while being downloaded. In this context, both formats are typically pre-recorded and available on demand whenever the listener is ready to access the files.



Per IAB standards, a download is counted once per episode, per unique IP address, and device user agent combination within a 24-hour window (either a fixed calendar day or a rolling window) when 60 seconds or more of the audio file has been sent to the listener's device. Companies can apply additional filtering using metadata if available.

Audio can be automatically downloaded to one's phone; in case they want to hear it later. Or, audio can be downloaded when a listener wants to hear it - a "user-initiated download". For an app like Apple Podcasts, which does both automatic and user-initiated downloads, the podcast hosting company does not know which it is. It just knows it is a download.

In standard podcast analytics, a podcast never truly "streams." The term "streaming" in podcasting refers to a progressive download that occurs while a user plays an episode. These "streamed" podcast files are still logged as downloads by server logs. Some podcast players offer additional insights into listener behaviour, but only within their own apps, limiting the overall view of user engagement.

Sources: IAB Tech Lab - Podcast Measurement Technical Guidelines, Podnews, Sounds Profitable

▶ Survey-based measurement

Survey-based measurement approaches, such as those used by Edison Research and Triton Digital, aim to estimate podcast audiences by capturing self-reported listening behaviour from representative consumer panels. Rather than relying on platform or server logs, these methodologies focus on *who* is listening, *how often*, and in *what context*, enabling demographic and behavioural insights that download metrics alone cannot provide. While survey-based data offers a more holistic view of audience reach and composition across platforms and devices, it is dependent on respondent recall and modelling assumptions, and is typically reported at lower frequency (e.g. quarterly) rather than in real time.

▶ Hybrid / integrated measurement approaches

As podcast consumption fragments across audio and video platforms, hybrid measurement approaches have emerged to provide a more complete and audience centric picture. These

systems combine census level data such as server side logs or platform reported usage with survey based audience research to estimate total reach, frequency, and audience composition across multiple environments. Leading examples include Triton Digital's dual approach and Demos+ which pairs monthly download based rankings with quarterly survey listener data to attribute demographics even to smaller shows and Nielsen Podcast Fusion, which integrates Edison Podcast Metrics into Nielsen Media Impact to enable planning and comparison of podcasts alongside TV, radio, digital, and social media.

By linking observed consumption signals with modelled demographic and behavioural data, hybrid systems move beyond raw delivery metrics toward a more holistic view of how audiences engage with podcasts across formats. However, these approaches still face challenges around deduplicating listeners across platforms, reconciling fundamentally different measurement units, and maintaining transparency when modelling survey or behavioural data. As a result, hybrid measurement represents an important step forward but not yet a fully standardised or universally accepted solution for cross platform podcast measurement.

Sources of podcast statistics

There are several key sources of podcast analytics, each providing a different perspective on reach and engagement:

- **Podcast Hosting Platforms** (e.g. Libsyn, Buzzsprout, RSS.com, Captivate): hosting platforms collect census-level data based on RSS delivery and provide download counts, listener geography and device information across most open podcast platforms. While this remains the backbone of podcast measurement, it primarily reflects RSS-based consumption and does not fully capture in-app streaming or video podcast usage on closed platforms.
- **Third-Party Prefix Services** (e.g. OP3, Podtrac): prefix services measure podcast requests by inserting a tracking layer into episode URLs, enabling standardised reporting across platforms and publishers. These systems track file requests rather than confirmed playback, which limits insight into actual listening behaviour or completion.
- **Logfile Analysis Services** (e.g. Triton Podcast Metrics): logfile-based measurement analyses server delivery logs to estimate validated downloads and file delivery, often aligned with IAB measurement standards. Compared to prefix tracking, logfile analysis can offer a more robust census view of audio delivery, but still focuses on delivery rather than listener engagement.
- **Podcast App Analytics** (e.g. Apple Podcasts Connect, Spotify for Podcasters, YouTube Studio): platform-native analytics provide the most detailed behavioural insights, including starts, completion rates, skips and engagement. However, this data is siloed within each platform and cannot be standardised or deduplicated across the wider podcast ecosystem. See more details on the platform specific metrics below.

In practice, podcasters and advertisers increasingly combine multiple data sources to balance scale, accuracy and behavioural insight, reflecting the fragmented nature of modern podcast consumption.

Platform-specific metrics (Spotify, YouTube, Apple)

The ability to track podcast content and ad playback largely depends on the player requesting the file. Spotify, Apple and YouTube can only report on the listening activity happening in their own apps and will therefore only represent a part of the total downloads and differ from the data from podcast host.

Spotify

Spotify's strength in podcast measurement comes from its access to detailed behavioural data from logged-in users. This allows creators to track metrics such as drop-off rates, average listen time, and completion rates per episode, as well as demographic information like gender, location, and device type (mobile, desktop, smart speakers).

A major change in May 2025 replaced the "Starts" metric with **Plays**, which count the number of times users actively listened to or watched an episode. Public play counts are displayed as milestone badges (e.g., 50K, 100K) once thresholds are reached, while creators still see exact figures internally in Spotify for Creators or Megaphone dashboards.

Streams – the metric that still underpins monetisation – are counted when a listener consumes **at least 60 seconds** of a podcast episode. Streams determine ad revenue eligibility, payout calculations, and other monetisation metrics, meaning that while Plays reflect overall engagement, **Streams remain the currency for revenue.**

Spotify also permanently **deduplicates listeners** using logged-in accounts. A single user listening repeatedly to the same episode is counted only once, in contrast to IAB standards, which use IP addresses, user agents, and 24-hour windows, potentially counting the same person multiple times. This approach, combined with its platform-specific metrics, means Spotify data cannot be directly compared with hosting or third-party download-based statistics.

Source: Spotify

Apple Podcast

Apple Podcasts Analytics reports *listens* from devices that actually play content in the Apple Podcasts app, rather than raw downloads from server logs. Metrics include unique listeners (devices that played at least one second), total plays, average consumption rates, follower growth, geographic breakdowns and episode skip/drop off behaviour, giving creators a sense of how their audience engages on Apple's ecosystem. Subscription shows offer additional insights into free trial conversions, paid subscribers and revenue performance.

Unlike Spotify's account based approach, Apple's analytics is **device based**, so deduplication is less precise – a listener using multiple devices could be counted more than once. Apple also has minimum data thresholds; shows with very low engagement may not surface analytics until they hit basic listen counts.

Apple has also expanded discovery and localisation, rolling out year end and regional charts in nearly **100 countries and regions**, spotlighting Top Shows, Most Followed and Most Shared shows to help guide listener discovery.

Apple has announced the new HLS video podcast experience but has not (at the date of the publication of this insight) published a detailed specifications of the analytics they will





expose specifically for HLS video streams

Sources: Apple, Spotify, Podnews, Voxalyze

YouTube and podcast measurement

YouTube has become a major hub for podcast consumption, even though it is not a traditional podcast platform in the RSS feed sense. Unlike Apple or Spotify, YouTube does not count downloads or plays tied to an RSS ecosystem; it measures engagement through video views and watch time metrics within its native platform.

YouTube Analytics focuses on core video performance indicators such as total views, watch time, average view duration and audience retention. These metrics reflect how long viewers actually watch an episode and how well content holds attention, which are central to how YouTube's algorithm surfaces and ranks content.

- Views: Counted when a viewer watches a video long enough to meet YouTube's criteria (typically 30 seconds or more).
- Watch time: Total minutes watched – a key metric both for creators and YouTube's recommendation engine.
- Average view duration & retention: Show how much of an episode viewers watch on average and where they drop off.

YouTube also provides demographic details (e.g., age and gender) for logged in users.

Because YouTube treats podcasts as video content, the way it measures engagement can produce very different numbers from traditional podcast platforms. For example, a view on YouTube may not equate to a one minute listening threshold used by the IAB or other podcast standards, and auto play, recommendations and incidental discovery can inflate metrics relative to intentional listening.

That measurement difference has real implications: some industry reports suggest that YouTube captures a substantial share of simulcast consumption, underscoring its role in multi format strategies. However, because YouTube's metrics are not aligned with IAB or traditional download/play definitions, they are not directly comparable with podcast platform data without careful normalisation.

In practice, podcasters typically track YouTube performance in parallel with download and play based metrics from audio platforms – using YouTube's watch time and retention stats to understand engagement on that platform, while relying on industry measurement standards for cross platform audience and monetisation insights.

Source: Google

▶ Measurement of advertising in podcasts

Integrated ads

Traditionally, podcast ad campaigns feature ads read by the podcast host or a familiar voice. These ads are permanently embedded in the episode file. Since every listener who downloads the file receives the same ads, targeting capabilities are limited.

Dynamically inserted ads

Ad technology advancements have enabled the targeting and dynamic insertion of ads at the time of file request. Ad servers determine the best ad to deliver based on user data. In a podcast consumed online, ads may be inserted into a file being progressively downloaded at designated ad breaks.

Measurement with server logs

To ensure accurate counts for podcast downloads and ads, publishers analyse server logs. These logs track downloaded podcast files, dynamically inserted ads, and other content requests.

An ad impression in podcasting refers to an ad delivered, meaning a portion of the episode containing the advertisement has been sent to the listener. According to IAB guidelines:

- If an ad is baked-in, the ad is considered delivered once the associated portion of the episode has been downloaded.
- If an ad is dynamically inserted, 100% of the ad file must be downloaded for it to count as delivered. For example, if an ad is placed in the first 25% of an episode, the ad is counted as delivered if at least 25% of the episode is downloaded.

However, an ad is only counted as delivered if the download itself is valid. For example, a pre-roll ad cannot be counted as delivered if the podcast download does not reach a minimum threshold, even if the ad is fully downloaded.

Sources: IAB Tech Lab - Podcast Measurement Technical Guidelines, Sounds Profitable

Development of new standards beyond the "download"

The Alliance for Measurement in Podcasting (AMP), an independent industry coalition convened by podcast advertising agency Oxford Road, announced in June 2026 the first unified impression framework for audio and video podcasting. The initiative responds to a longstanding measurement fragmentation: Apple Podcasts counts downloads, Spotify counts streams, and YouTube counts views – making cross-platform comparison effectively impossible for advertisers, and costing the market an estimated $1 billion in stalled ad spend. Unanimously ratified by its twelve voting members (including Spotify), the AMP framework establishes four common definitions – *Podcast Play* (30 seconds of content played, audio or video), *Podcast Audience* (the number of unique users who had a Podcast Play), *Ad Impression* (a commercial begins playing for the user), and *Ad Audience* (the number of users exposed to an Ad Impression) – designed to work across both audio and video as a supplementary layer alongside existing platform metrics, rather than replacing them. Full guidance and an implementation guide are expected after Oxford Road's CAO Summit in July 2026.

Source: Sounds Profitable

C. MEASUREMENT SOLUTIONS LANDSCAPE

▶ Podcast Rankers

Podcast rankers, such as Triton Digital, Edison Research, and country-specific rankings, measure podcast popularity using downloads, unique listeners, and engagement rates. However, methodologies vary, making cross-platform comparisons challenging. Country-specific podcast rankers only count downloads from within that country and usually only include publishers who choose to participate.

Apart from international rankers such as Podtrac, there are podcast rankers in Norway, New Zealand, Sweden, Australia, Belgium, France the Netherlands, Canada, Latin America, and the US. These are operated by various companies, with many provided by Triton Digital. They work by analysing podcast log files to calculate the total number of downloads.

Depending on how they are calculated, rankers can be a useful way to compare different shows across various platforms, they do however usually only feature those publishers who chose to participate.

Source: Podnews

▶ Triton Digital's Rankers and Podcast Metrics

Triton Digital's Podcast Rankers list the top podcasts in a country or region using data from its **Podcast Metrics** measurement service and are published monthly. These rankers use **average weekly downloads and/or listeners** in line with the IAB Podcast Technical Measurement Guidelines and include only podcasts and publishers that opt in to Triton's measurement. Triton rankers are available in Australia, Canada, LATAM, the Netherlands, New Zealand and United States.

Triton's Podcast Metrics service measures downloads, listeners, and downloaded hours for on demand audio, based on IAB aligned server log data. Reports are calculated over a four week period and can be broken down by network, program, episode, geography, device, and distributor. Podcast Metrics also reports **YouTube consumption data via API connection** (metrics are calculated by YouTube), allowing publishers to view audio and video consumption together. For precise definitions see Triton's methodology here.



In 2025, Triton introduced **quarterly survey based listener rankings** to complement the monthly download-based rankers. These survey rankings include the **Top 200 podcasts** based on a nationally representative survey that captures *what listeners report they have listened to or watched*, explicitly including video podcast consumption via platforms like YouTube. This provides a broader view of audience reach beyond the opt-in downloads measured monthly.

Triton's **Demos+** product combines census-level download data with survey data from Signal Hill Insights to provide demographic, behavioural, and consumer intent profiles. It creates audience "neighbourhoods" by identifying podcasts with overlapping audiences, allowing profile data from survey respondents to be attributed across multiple shows. This approach helps describe audience composition for individual podcasts or genres while accounting for limited survey responses for smaller shows.

Overall, Triton's measurement now combines **monthly download-based rankers, quarterly survey-based rankings, and audience profiling** to provide multiple perspectives on podcast reach and listener characteristics.

In 2026, Triton further expanded its analytics offering with the introduction of a new Podcast Metrics Industry Feature Set. This update provides publishers with aggregated industry benchmarks across the top 20 podcast markets (by download), allowing them to compare their programs and average episode downloads, audience composition, and market share against the wider Triton-measured ecosystem. By offering market-level context and competitive insights – including genre, device, and listening behaviour comparisons – the new features give publishers a clearer understanding of their relative performance and potential growth opportunities within the global podcast landscape.

Sources: Triton Digital Rankers, Triton Digital Podcast Metrics, Sounds Profitable, BusinessWire, Rain News

▶ Netherlands: NMO Podcast Standard

In addition to the Radio Audience Measurement, NMO has two other sources that provide insights into audio consumption: the Streaming Audio Standard and the Podcast Standard, both based on census rather than panel data with the objective to map listening to streaming audio and podcasts.

NMO collaborates with Triton Digital to establish these two standards, which comply with the guidelines set by the Media Rating Council (MRC) and the Interactive Advertising Bureau (IAB). Triton is responsible for collecting and processing the data. The results are published in the form of monthly rankings for both streaming audio and podcasts.

Such census-based audio measurement involves all registered, processed and reported actions on a digital device, such as a smartphone or tablet, and do not come from a sample or panel of respondents but are rather based on the entire universe. Census data also register stations that achieve too few observations in a panel study and allow these to be reliably reported. However, since the census data reports on devices rather than people, it is not possible to indicate the profile of the media consumer behind the device or to report reach.

NMO's Podcast Standard maps the use of podcasts and audio on demand. It covers all audio that can be requested on demand, downloaded, or streamed. Unlike the streaming standard, this does not concern the consumption of live or linear radio. Programs or parts of programs that have previously been broadcast and are later listened to fall within the definition of the podcast standard. The NMO Podcast Standard distinguishes between two classifications:

- Podcast – an audio program, usually consisting of multiple episodes, that users can stream or download and listen to at their chosen times;
- Broadcast – all on-demand audio programs that have been fully or partially broadcast live before.

The results of the NMO Podcast Standard are published based on monthly rankings. These are made based on the number of downloads or stream starts achieved in a period of four or five weeks, closely aligning with the calendar month. Invalid downloads and podcasts or audio on demand downloaded or streamed outside the Netherlands are filtered out.

On NMOdata.nl, these lists can be viewed separately or combined into a single overview.

More details on radio and audio measurement in the Netherlands can be found in Chapter 03 (pages 24-29).

▶ Edison's Podcast Metrics in the US and the UK

In the US, Edison Research interviews 20.000 weekly podcast listeners age 13 and older each year about the shows they listened to in the last week. In addition to calculating the weekly reach of podcast networks and shows, the report tracks demographics, content preferences, and listening behaviours. It is a podcast measurement service that measures listening, not downloads, across all networks, shows and platforms.

Edison Research has produced rankers of the Top Podcasts and Networks in the US since 2019 and has measured the podcast space for over 15 years. Subscribers to the service including podcast networks and agencies receive quarterly data updates delivered via an online dashboard. The Podcast and Network Rankers provide reach and rank, with the ability to filter and rank by dozens of demographics. The Efficiency Ranker determines which shows index highest against a specific target. Show and Network Profiles give users a summary of

their demographic characteristics.

As of 2023 Edison Research launched their Podcast Metrics also in the UK where Edison interviews 8.000 weekly podcast listeners age 15 and older each year about the shows they listened to in the last week. In addition to calculating the weekly reach of podcasts, the report tracks demographics, content preferences, and listening behaviours.

▶ Edison's Podcast Metrics and Nielsen Integration

In August 2025, Edison and Nielsen launched **Nielsen Podcast Fusion** powered by Edison Research, integrating Edison Podcast Metrics into Nielsen Media Impact (NMI) for the first time. This allows advertisers and agencies to plan, optimise and compare podcasts alongside TV, radio, digital and social media in a single platform. Early charter subscribers include NPR and Ocean Media.

This integration enables agencies to **plan, optimise, and compare podcasts alongside other media**. By combining Edison's survey-based listening data with Nielsen's media measurement infrastructure, planners gain a more unified view of podcast audiences across platforms, supporting cross-media campaign planning.

Sources: Edison Research, Nielsen

▶ Sweden: PODDINDEX

Poddindex, established in 2017, is Sweden's standardized system for podcast measurement, managed by Kantar Media in collaboration with a committee comprising representatives from Sveriges Radio, Acast, Podplay/Bauer Media, Podspace, Perfect Day Media, and Sveriges Annonsörer. The standard aligns with international guidelines from the IAB Tech Lab.

Poddindex offers two key metrics:

» Technical Media Reach ("IAB Listeners"): This metric reflects the number of unique players accessing podcasts weekly, accounting for various platforms like web browsers, apps, or other audio playback devices.

» Starts/Downloads ("IAB Downloads"): This figure represents the number of streams that played for more than 60 seconds, as well as fully downloaded episodes, indicating the total listens per week.

The value for listens is typically higher than technical reach because the same unique player can start the same episode multiple times or listen to multiple episodes within a given period.

Kantar Media ensures data accuracy by accessing server log files from connected platforms, with **Kantar Media Audit performing random sample audits** to validate the data (acceptable variance ±10%). To be counted, a listener must have listened **at least 60 seconds** or downloaded the episode; metrics apply across all episodes and platforms, including international listening (~6%).

Data from Poddindex is publicly available in the Mediafacts tool by Kantar, providing transparency about which media house a podcast is associated with. This allows advertisers to filter and view all podcasts from a particular publisher in Mediafacts, offering security for advertisers and media buyers when investing in podcast advertising.

More details about the methodology can be found here.

Source: mediafacts.se

▶ Norway: Podtoppen

Podtoppen is Norway's official podcast ranking and measurement system, owned by NRK, Schibsted, Bauer Media, the P4 Group, and Moderne Media, and funded by its owners and participating platforms. Kantar Media oversees quality control and regular audits to ensure consistency across platforms. Since June 2025, participating platforms themselves perform the aggregation of server log data, while Kantar conducts oversight and verification.

The measurement includes podcasts hosted on NRK, Schibsted (Stream), Bauer Media (Podplay), P4, Moderne Media (Podspace), AdLink (Omny Studio), and Acast. Each platform provides server logs to Kantar, which are processed according to IAB-aligned standards.

Podtoppen reports two key metrics weekly:

» Streamed/Downloaded – The total number of episode plays or downloads in the week. Plays are counted within a 24-hour window and include both new and past episodes.

» Unique Devices – The number of distinct devices that streamed or downloaded at least one episode during the week, identified using a combination of IP address and user agent. This metric is comparable to "reach" but measures devices rather than individual listeners.

Because a single device may stream multiple episodes, the Streamed/Downloaded figure is typically higher than Unique Devices.

To ensure accuracy and comparability:

» Data is filtered to remove bots and non-human traffic.

» Only plays/downloads of at least 60 seconds are counted.

» Autoplay is excluded; users must manually select or press "play."

» Only direct server streams are counted; cached plays via distributors are excluded but can sometimes be negotiated.

» All podcasts follow IAB-aligned rules, though minor deviations may occur depending on platform implementation.

Podtoppen is published weekly and provides a transparent, standardized view of podcast consumption in Norway, supporting advertisers and media planners in cross-platform planning.

Sources: Podtoppen

▶ France: EAR > podcast and ACPM certification

Podcast measurement in France has undergone a major transformation in 2025, moving from a dual measurement system to a collaborative, harmonised framework between Médiamétrie and ACPM.

Médiamétrie – EAR > Podcast

Médiamétrie, historically known for tracking podcast listens and downloads via eStat Podcast, launched its evolved service EAR > Podcast in September 2025. EAR > Podcast measures podcast listens and downloads across platforms using server logs provided by publishers, rather than site centric tracking. EAR > Podcast captures both radio-based catch-up and original podcast content.

ACPM now handles log collection, analysis, and quality control, applying IAB Tech Lab–aligned filters and calculation rules. This allows results to be comparable across publishers and between Médiamétrie and ACPM reports, as well as reflect international standards. The new EAR > Podcast methodology is fully operational from July 2025.



ACPM – certification and unified measurement

ACPM, which has operated a podcast certification programme since 2020, accredits Content Delivery Networks (CDNs) that distribute podcasts, including Acast, Ausha, Audion, Audiomeans, Megaphone, and Saooti.

As of December 2025, ACPM certified approximately 795 podcasts within its monthly rankings, covering over 2,600 digital radio and podcast properties nationally.

Under the 2025 collaboration with Médiamétrie, ACPM now operates a single, shared platform where all publisher logs are controlled, whether they subscribe to Médiamétrie or ACPM services. The server-side approach ensures IAB-compliant metrics. Monthly certification and ranking reports give advertisers and agencies transparent, comparable metrics for planning and buying.

Sources: ACPM, Mediametrie

▶ Germany: ma Podcast

The ma Podcast is a cross-genre, independent study that has provided comparable technical usage data for podcasts in the German market since December 2021. The ma Podcast methodology is based on an analysis of server log files. For this purpose, log files of all podcasts participating in the study are sent by the hosting platforms to an independent service provider commissioned by agma, where they are verified and processed to the central identification unit "agma valid downloads." This unit is based on the "download" definition outlined in the IAB podcast measurement guidelines.

The core metric of agma's ma Podcast reporting is the monthly value of "valid downloads" per podcast. Further filtering is available by publisher, including classification of podcasts by category or as ad-supported/ad-free. In the summer of 2024, an additional KPI was introduced, which measures the performance of episodes released during the respective analysis month.

Since June 2023, the log file data has been supplemented with information on podcast usage and the sociodemographic profile of podcast listeners. This data set includes respondents aged 14 and above who have listened to podcasts in the last four weeks. The modelling of podcast usage is based on CAWI survey data. The core of the survey involves a listing of the podcasts respondents have listened to in the last four weeks. Respondents select podcasts from a pre-defined list or enter them manually. Detailed questions about podcast listening occasions are asked for each podcast title.

The survey results are then combined with the available technical measurement data for the corresponding period from ma Podcast. A report, published for the first time in November 2024, combines data from the most recent surveys, covering a total of 12.288 participants. This data is accessible through an online dashboard called the Target Group Explorer. Further surveys are planned. The latest survey with 6,172 participants was conducted in winter 2025, so new information about target groups will be available in spring 2026.

More details on radio, audio and podcast measurement in Germany can be found in Chapter 05 (pages 41-43).

Source: ma Podcast

CONCLUSIONS

The markets covered in this report provide a wealth of benchmarking information that should be of value to any national radio industry stakeholder considering a change of methodology. Analysing the radio audience measurement evolution in these and other countries, one can conclude that neither declarative nor passive methodologies are perfect. Different markets have different characteristics and different needs: there is no one-size-fits-all solution when it comes to radio audience measurement.

The careful and thorough testing and evaluation carried out both in markets that have implemented electronic measurement and in those that have not done so to date demonstrate the importance of ensuring that the conditions and technologies adopted are fit for purpose. To date, electronic radio measurement has been tested widely but implemented in only a handful of countries around the world. All things being equal, modern passive electronic measurement systems provide more accurate measurement of listening. However, the main hurdle to the implementation of such systems for broadcast radio is their cost in comparison with recall or diary methods. Therefore, the most common approach, among radio markets with declarative audience measurement methodologies in place, is to discover and test various options on how to improve the quality of the current method rather than to immediately switch to electronic passive measurement.

From the advertising business perspective, it is more important to have total market agreement on a certain level of measurement accuracy, which is accepted and trusted by advertisers, agencies and radio publishers, rather than to rely on excessively expensive, granular but unstable data from electronic meters. It is more beneficial to have reliable and stable recall data rather than volatile data from a small electronic panel. These considerations are not valid if the panel is big enough and the market in question can afford to switch to electronic measurement. However, for most radio markets that still use recall methods, it seems to make more sense to consider and test hybrid audience measurement models combining different data collection methods from broadcast radio, streaming and podcast.

If a market decides to switch to passive electronic measurement, it is worth considering the following recommendations:

» Take time to prepare – make sure you have a well-balanced panel of sufficient size and that you have a long enough test period. Prepare the market and your sales staff well before the switch.

» Convince the market – electronic measurement is normally more expensive, but it is expected to attract more attention from media buyers.

» Think twice about the inventory – do not be afraid of the expected drop in gross contacts: a higher contact cost will compensate for this, but be prepared to make the argument for it.

» Have all radio sales houses on board.

Radio audience measurement continues to be an area of testing, evaluating and innovating. In parallel to these advances, the next phase of measurement evolution is to take place in the online audio space including audio streaming and podcast. A total audio measurement solution combining all the audio types will also be the focus of development in the coming years with the ultimate goal of designing and implementing measurement techniques that are able to capture the full spectrum of audio consumption.

CONTRIBUTIONS BY PARTNERS ON THE FUTURE OF RADIO MEASUREMENT

egta: *Does radio need to change its current audience measurement? Why? Where does the pressure for innovation and change come from (agencies, marketers, radio itself)?*

GfK: Among the traditional media, radio remains strong and useful. Not only is it regularly seen as the most trusted medium, but it has also proved its resilience in an increasingly competitive audio environment. We also saw this resilience in the COVID lockdowns with listening levels being maintained albeit with some shifts in behaviours. One notable shift was the growth in the proportion of people consuming live radio content via streaming. In most countries, radio audience measurement is still based on survey methods such as diaries or day after recall. While these methods may suit a particular market's geographical and financial set up, and maintaining them gives consistency of data, feedback from clients, particularly the media agencies, highlight that measurement needs to keep pace with the wider and more 'digitized' market. Furthermore, measurement systems need to be more 'COVID proof' to avoid the data collection disruptions experienced in many markets. We therefore believe that radio certainly does need to evolve its current audience measurement in various European markets and further afield.

egta: *What are the expectations of each of the stakeholders (brands, agencies, radios) in regards to the radio audience measurement evolution/upgrade?*

GfK: Generally speaking, there is a strong demand for a more modern approach. One that provides a more precise reporting of listening, including event measurement, and one that incorporates more accurate measurement of streaming. Advertisers and agencies would like to have radio listening reported within the broader audio (and cross media) picture.

egta: *What are the main challenges (from the research point of view) the industry faces and which obstacles does it need to overcome in order to meet those expectations?*

GfK: Incorporating electronic meter measurement, either wholly or in part, continues to be desirable yet challenging. It presents several issues that are preventing a broad adoption by the global market: it is more expensive than traditional measurement, it tends to be more severe in its outcomes (especially for time spent listening), it can be problematic for bigger countries with many local stations that need to have large samples,



and it is not necessarily easy to account for headphone listening. Whilst it may be ultimately feasible to achieve, its potential for broad scale adoption across multiple markets is extremely small.

egta: *What is your vision on how to overcome all or some of those obstacles? Which solutions would work best in your opinion?*

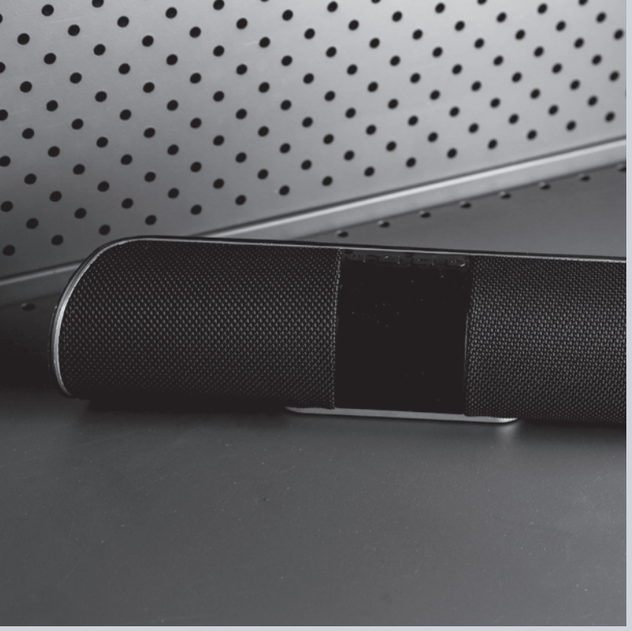
GfK: While in many countries, traditional measurement will remain the benchmark, in other more pioneering countries, we will see methods evolve to embrace hybrid solutions. Many individual studies have been conducted over the years assessing the different measurement methodologies, showing that each system has its advantages and disadvantages. Integrating datasets to exploit the best from each is the way forward. GfK is already moving fast in this direction with its clients. For example, in Australia, we have taken tagged census data and station log file data, applied modelling to profile the streaming, and integrated this into the currency. Essentially, replacing survey-based online listening data with live-from-source actual streaming data, while maintaining the core total audience metrics. We call this product Radio360. It shows what can be achieved with hybrid measurement that meets the expectations of the stakeholders for a more modern and digitized radio currency. We will be adopting the Radio360 methodology in more markets to come, e.g. in South Africa in the course of 2026, and we are working on several PoCs in other countries this year.

egta: *Does radio need to change its current audience measurement? Why? Where does the pressure for innovation and change come from (agencies, marketers, radio itself)?*

Ipsos: Radio/audio needs to adapt to measure beyond linear broadcast media. The rise of digital content, streaming platforms, and new devices to listen to audio content is attracting more listeners to the industry. Recent data from RAJAR, in the UK, highlights how listening via smart speakers continues to rise with total digital listening now accounting for over 75% of all radio listening, signifying the success of the industry's digital migration.

At the same time, the rise of native digital radios and the multiplication of listening platforms and audio formats pose many challenges to audience measurement systems based on declared listening.

Alongside measuring new forms of audio content, the industry needs to also embrace new measurement techniques and adopt hybrid measurement frameworks to deliver more granular and accurate insights. The NMO's new listening currency is a prime example of how minute-by-minute audience data provides rich insights that can help marketers and media agencies plan more effectively. Ipsos' MediaCell technology passively measures respondents' listening habits and has helped to provide a truer picture of audience behaviour. It has removed memory bias and allowed a more complete measurement of complex listening patterns and interstitial listening, proving that people listen to far more broadcasters than they claim when asked. According to Audify, the Dutch audio advertising industry grows every year since the new currency's launch (7% growth in both 2023 and 2024 and growing again in 2025).



Whilst there is pressure from media agencies and advertisers, many radio JICs are typically conservative. They find it hard to change due to the financial pressures and the risk of breaking their longitudinal trend data. To overcome this, the industry needs to decide on what it wants to measure and how that corresponds to advertising revenue. Whilst the audio industry should aspire to measure every media touchpoint, it is unrealistic and impractical. Trade-offs are therefore needed to ensure radio currencies evolve to showcase the strength of audio vs other media, whilst being delivered at an acceptable cost.

egta: *What are the expectations of each of the stakeholders (brands, agencies, radios) in regards to the radio audience measurement evolution/upgrade?*

Ipsos: Advertisers and media agencies are keen on a common standard of metrics and would like comparable data to compare versus digital and TV campaigns. They want more granular audience insights delivered seamlessly into their buying systems, ideally the day after airing or even in real-time to enable faster optimisation. Programmatic buying is driving this trend as it has sped up transactions by automating the buying and selling process. This has led to many buyers wanting more data to help them contextually target their campaigns. Programmatic technology however doesn't universally support all audio formats which is where audience measurement continues to play a vital role in helping inform and fill gaps.

Broadcasters are keen to maximise their reported audiences and have a total picture across all their assets. Whilst they want or need this complete view, increased revenue pressures mean there is a gap between the amount they spend on research and the amount required to collect the information.

egta: *What are the main challenges (from the research point of view) the industry faces and which obstacles does it need to overcome in order to meet those expectations?*

Ipsos: If the measurement system changes, the reported audience will change but it doesn't mean the actual listening behaviour has changed. Good currencies represent our best attempts to get close to the truth using the most appropriate and state-of-the-art solutions available. They do not stand still. The way people think about scheduling campaigns will change if greater knowledge is available about audiences across the day and over time. Passive audience measurement systems are ideally built around cooperation: either all stations should encode their audio, even if their audience share falls which can be tough to achieve, or if an audio-matching solution is developed instead, there needs to be an investment in building infrastructure to maximise accuracy. The NMO has proved that we mustn't be afraid of smaller numbers. Whilst total listening in their new system has declined, they cite how passive measurement "produces more accurate and granular outputs," leading to an overall increase in the number of stations reportedly listened to and a greater understanding of thematic peaks. Subsequently, this has increased confidence in the marketplace leading to growth in advertising spend.

There is also the challenge of managing the server data generated from the digital consumption of audio and applying internationally accepted standards of data cleaning and editing. The target is that the data can be viewed similarly to traditional "listening data" showing consumption of audio content across platforms and devices (session-ised and de-duplicated). RAJAR for instance transforms the minute-by-minute data which they collect passively into 15-minute blocks which are converted into a diary format and hence treated like a diary participant for integrating into the hybrid methodology.

The challenge of overcoming these obstacles is also the cost of using the most modern software/hardware solutions, and new data science capabilities to accurately capture, blend and report on nationally representative listening behaviour.



egta: *What is your vision on how to overcome all or some of those obstacles? Which solutions would work best in your opinion?*

Ipsos: The vision of how to overcome all these obstacles is to create a robust hybrid method of measurement that merges survey, passive and server data into a unified dataset. This provides a complete view of audio consumption across any platform, any device and at any time.

For hybrid audience measurement systems to work, it is vital to combine data from different sources with data science and data integration playing a crucial role. A key development in this space is the use of synthetic data, or more precisely, synthetic populations as a foundation for integrating disparate data sources and delivering robust audience data in a privacy-safe way. Ipsos has been at the forefront of this new method, pioneering the use of synthetic data first in the space of OOH advertising measurement, and then expanding to digital and cross-media measurement.

A close collaboration between Joint Industry Committees, experts at research agencies, data science, digital audio specialists and radio broadcasters is required to facilitate the creation of synthetic models, to deliver a more unified and ultimately more accurate dataset. New developments in data science and AI must also be incorporated which will help to simplify the process, speed up data delivery and drive affordability.

egta: *Does radio need to change its current audience measurement? Why? Where does the pressure for innovation and change come from (agencies, marketers, radio itself)?*

Nielsen: There are several reasons change is needed in the measurement space:

Evolving Media Landscape: The media landscape has undergone significant changes in recent years with the rise of digital platforms, streaming services, and podcasts. Traditional radio faces increased competition for audience attention, and accurate measurement methods are crucial to demonstrate its reach and effectiveness compared to other media.

Fragmented Audience: Audiences are no longer limited to tuning in to local radio stations. People have access to a wide range of options from different locations, genres, and platforms. Traditional audience measurement methods may not fully capture the extent of that fragmentation, leading to a misrepresentation of measurement metrics.

Digital and Mobile Consumption: As listeners increasingly access radio content through online platforms and mobile devices, traditional measurement techniques that rely on recall-based solutions like diaries or phone surveys may not be as accurate or timely. Digital technologies offer opportunities for more precise, real-time measurement of radio consumption.

Accountability and ROI: Advertisers and marketers often demand more accurate and reliable metrics to justify their investments and assess the return on investment (ROI). Recall measurement methods may not provide the level of accountability and granularity required by advertisers, leading to a shift in ad budgets to other platforms that offer more sophisticated measurement capabilities.

We see the pressure for innovation and change in radio audience measurement come from:

Agencies and Advertisers: Advertising agencies and marketers play a significant role in driving change. They seek more precise metrics and data to make informed decisions about where to allocate their advertising budgets. They may push for advancements in audience measurement to ensure transparency and demonstrate the value of radio advertising.

Radio Industry Itself: Forward-thinking radio stations and industry associations recognize the need to adapt to changing media consumption habits. They understand the importance of accurate audience measurement to attract advertisers and maintain relevance in an increasingly competitive landscape. They may drive innovation by investing in new measurement technologies or advocating for industry-wide changes.

Industry Bodies: JICs and MOCs overseeing the broadcasting industry also play a role in advocating for updated audience measurement methods. They recognize the need for more accurate and standardized metrics to ensure fairness and competitiveness among broadcasters.

egta: *What are the main challenges (from the research point of view) the industry faces and which obstacles does it need to overcome to meet those expectations?*

Nielsen:

Fragmentation of Audience: As audiences have diversified their media consumption habits, radio faces the challenge of accurately measuring and understanding fragmented audiences across various platforms, including traditional terrestrial radio, online streaming, podcasts, and mobile apps. Research efforts need to focus on developing comprehensive measurement techniques that capture the full spectrum of radio consumption.

Cross-Platform Measurement: With the proliferation of media channels and devices, there is a growing demand for cross-platform measurement that provides a holistic view of audience engagement across multiple touchpoints. Radio research needs to integrate data from various sources and platforms to provide a comprehensive understanding of how audiences interact with radio content.

Digital Transformation: Radio has been impacted by the digital revolution, and research efforts need to keep pace with the changes brought about by digital technologies. This includes understanding digital consumption patterns, developing new measurement methodologies for online and mobile radio, and leveraging data analytics to gain insights into audience behaviour and preferences.

Integration of Big Data: The availability of vast amounts of data presents both opportunities and challenges for radio research. Effectively harnessing big data to derive actionable insights requires advanced data analytics capabilities, including machine learning. Radio research needs to invest in data infrastructure and analytical tools to unlock the potential of big data for audience measurement and content optimization.

egta: *What is your vision on how to overcome all or some of those obstacles? Which solutions would work best in your opinion?*

Nielsen:

Advanced Audience Measurement: Invest in advanced audience measurement techniques that go beyond traditional methods. This can include the use of digital tracking technologies, data integration across platforms, and real-time analytics to capture and analyse audience behaviour across multiple touchpoints. Collaboration among industry stakeholders can help establish standardized measurement frameworks.

Cross-Platform Integration: Develop sophisticated cross-platform measurement tools that combine data from various sources, such as terrestrial broadcast, online streaming, mobile apps, and podcasts. This integration will provide a comprehensive view of audience engagement and enable accurate comparisons across different platforms.

Digital Transformation: Embrace digital transformation by investing in research and development of technologies specific to online and mobile radio consumption. This involves leveraging digital analytics, user behaviour tracking, and automated content recognition to gather insights and enhance audience measurement capabilities.

Big Data Analytics: Develop robust data analytics capabilities to process and analyse large volumes of data generated by radio platforms. Utilize machine learning to derive actionable insights, identify audience trends, and optimize content delivery. Collaboration with data scientists and researchers can help uncover valuable patterns within the data.



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This publication has been researched and produced by egta's radio department, and it draws inspiration from the team's conversations with industry experts and literature from multiple sources. Whilst every effort has been made to ensure the accuracy of the information in publication, egta does not accept responsibility for errors or omissions.

EDITORIAL COMMITTEE

Ania Lara
Head of Radio Research, egta
Katerina Borovska
Senior Manager – Marketing & Innovation, egta

ARTWORK

Paulina Kott
Senior Lead Ad Tech, egta

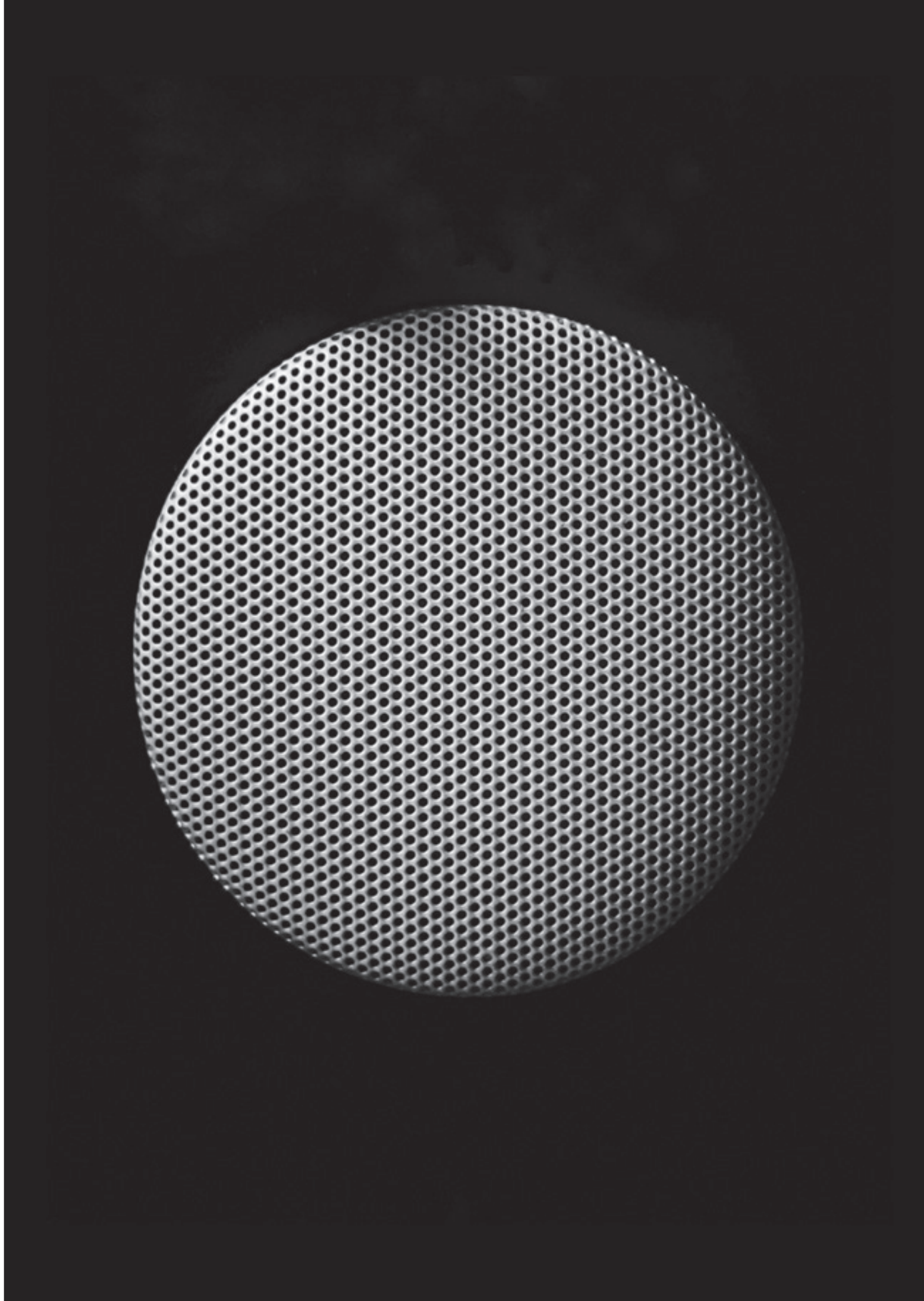
ABOUT egta

Leading. Connecting. Inspiring.

egta is the international trade body of multiplatform TV and audio businesses. We represent more than 180 members in over 40 markets. Our members are multiplatform TV and audio businesses that sit at the intersection of traditional TV and radio and digital video and audio platforms. Multiplatform TV and audio bring together linear and on-demand services, across all screens and platforms.

Our mission is to enable members to flourish and grow as they connect their audiences and services with brands, thus contributing to a healthy and sustainable media industry. egta is a knowledge-sharing and innovation hub for its members and the broader industry. Through our unique network of experts, we foster collaboration and engage with policy makers. We drive the industry forward through benchmarking, alignment on standards and cooperation.

Rue Washington 34 / boîte 2
1050 Brussels (Belgium)
T: + 32 2 290 31 31
www.egta.com



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