

Audience and Media Use Research - An International Perspective

Report

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The footnotes are not included in the English version. They have to be looked up in the original report

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Management Summary

Currency research organisations, i.e. organisations engaged in media audience research, whose results constitute a nationally accepted standard (“currency”) for the advertising industry, are of prime importance for developed media systems, creating transparency for the advertising industry in relation to the contacts / GRPs of the advertising media. The present study uses a global comparison of 17 countries to examine the structures, tasks and current challenges of the national currency research organisations.

In 15 of the 17 countries examined here, currency research is the sole responsibility of the participating private and public agents in the media and communications sector. It is only in Italy and Canada that the regulatory authorities have a legal mandate in the area of broadcasting currency research, comparable to the statutory duty of supervision in place in Switzerland.

Until a few years ago, currency research the world over was primarily carried out by media category, with currencies for radio, TV, print, online and other advertising media. However, in an era of digital convergence, this parallel approach yields only an incomplete image of media use. Therefore, print currency organisations first had to extend their research to include digital forms of print media content usage. Recently, the usage of audio and video content has also been shifting ever faster onto the internet, leading to currency organisations in the broadcasting sector also being forced to develop new research systems. This has created a strong dynamic within the sector, notable since 2010, which has found expression in cooperation, methodological innovations and structural changes.

The currency organisations in most countries still operate separately from one another, the exception being the one organisation where the currency research is centralised. Various different forms of cooperation have emerged however, not least as the advertising industry is demanding ever more vehemently an integration of the different currencies. This is why many countries are running or planning projects for convergent studies. However, the associated methodological, structural and financial problems are major and remain unsolved nearly everywhere.

The trend towards convergence, but also towards the automation and internationalisation of currency research, will have a powerful influence on currency research development. The major challenge, however, is approaching in the form of the advertising industry’s new online targeting strategies, which involve a decoupling of advertising and media content as advertising is placed with target groups instead of media. This could make classic currency research redundant.

1. Currency Studies in Switzerland and the International Context

The first steps towards media use research were taken in 1914, with the founding of the **Audit Bureau of Circulation (ABC)** by the Association of National Advertisers in the **USA**(1). The idea was to create transparency between the various newspapers and their contact services, and trust amongst advertisers and the media. In France, 1923 saw the establishment of the Office de justification des tirages (OJT, from 1948 OJD, from 2015 ACPM), which conducted print run certifications. The Office was founded by the publishing houses, advertisers and advertising agencies with the aim of increasing credibility and media transparency. Both organisations wanted to provide the advertising sector with reliable and objective data. Over the following decades more and more countries recognised the value of this kind of research. In Germany the investigation of and performance checks on advertising media began in 1949. One year earlier India had already started to systematically collect user data.

After initial steps in the 1930s to audit circulations of newspapers and magazines, Switzerland too saw the beginnings of a systematic media use research, some 50 years after it began in the USA, with the establishment in 1964 of the **WEMF AG for Advertising Media Research (AG für Werbemedienforschung, WEMF)**. Its founding fathers were the Publishers' Association (today's Swiss Media Association / Verband Schweizer Medien), plus three bodies representing the Swiss advertising industry (today's Leading Swiss Agencies, the Verband Schweizer Werbeauftraggeber / Swiss Advertiser Association and the Verband Schweizer Werbegesellschaften). A neutral industry research organisation, the WEMF to this day conducts syndicated media research in print, cinema and sponsorship. The 1990s saw the advent of MA Strategy, the WEMF's first cross-media study for strategic media planning.(2)

In 1968, the then **Commercial Television Company (AG für das Werbefernsehen(3))**, together with the SRG (Swiss Broadcasting Corporation), began Swiss TV usage research, and in 1975 radio usage research too was institutionalised. At the time there was just a single provider of radio and TV programmes, the SRG SSR, which meant that research at a national level emerged from the self-interest of the monopoly holder and from 1974 onwards remained associated for a long time with the SRG research service. In 2006 the SRG research service was converted into the independent **Mediapulse AG**, which to this day remains in charge of the currency studies in the radio and TV sector. The owner of Mediapulse AG is the Mediapulse Stiftung für Medienforschung media research foundation, which according to articles 78-81 of the federal law governing radio and TV (RTVG) is obliged by law to gather radio and TV data for the whole of Switzerland. To fund this obligation, the foundation receives an annual contribution from the fees levied for radio and TV 'for the development and provision of data-collecting methods and systems' (Art. 78 par. 1 RTVG). At the time of writing, this contribution stands at just under half a million Swiss francs.(4) The foundation council has representatives from the SRG SSR, the private radio and TV broadcasters as well as the advertising industry.

The official Swiss internet use research has been in place since 2006, in the form of **NET-Metrix AG**, a subsidiary of WEMF and Mediapulse. Other shareholders include the Swiss Internet Industry Association (Schweizer Branchenverband für Internetwirtschaft, SIMSA). Before that, both the WEMF and the SRG research service maintained separate internet research systems.

Today, according to experts, the research design, sample quality and survey content of usage research for the 'classic' print, radio and TV media in Switzerland – as opposed to internet and social media – enjoy an excellent reputation internationally.(5)

1.1. Radio and TV

Radio research in Switzerland was revolutionised in 2001 by the 'Radiowatch'; this was the first time a watch worn around the wrists of participants measured radio use. Continuous development resulted in the current version, now called '**Mediawatch**', developed by GfK. The Mediawatch works by '**audiomatching**', recording the radio signal on the part of the users and the broadcasters for subsequent comparison. When the signals overlap, it becomes clear who has been listening to what station and for how long. To our knowledge, this technology for radio usage analysis is only used extensively in Switzerland and Norway. Germany, for instance, is still using CATI interviews to gather radio usage data, while several countries are currently testing the introduction of technical measuring systems. Following a convincing test phase, the Netherlands are using the Mediawatch to extend their diary-based system and in the near future are set to exclusively use this method of measurement.

In Switzerland, Mediawatch's **panel** comprises a total of about 26,000 individuals, who are at least 15 years old and speak one of the country's languages. Around 1000 watches are in operation every week. According to Mediapulse, the sample is spread across the three linguistic regions: 655 for German-speaking Switzerland, 247 for French-speaking Switzerland, as well as 100 for the Italian-speaking Ticino region. Each participant wears the watch for one week, before sending it back to the GfK, which accesses the data. The watch is then passed on to the next participant with a similar sociodemographic profile. With the enhanced survey, scheduled to be introduced in 2018, the participants may determine for themselves the period for which they wear the watch. They will be able to choose from two periods of 4 weeks or from one period of 3 or 6 months. Another innovation is the docking station, which charges the watch and is also responsible for the daily data upload. In 2017 the two systems are running in parallel. Radio usage analysis is catching up with its TV usage counterpart, particularly in technical terms (faster data availability).

Swiss **TV usage research** has used an electronic data-collection system from as early as 1985 in the form of **Telecontrol**, which for a long time was run by the GfK. As the result of a tendering process, in 2012 the project was awarded to Kantar Media, which together with Mediapulse has been running the new system since early 2013. The switch was not entirely without hitches, and the market and a few TV broadcasters in particular were so unhappy with the figures that a court injunction banned Mediapulse from publishing data for six months. Since then the teething problems have been resolved; however, the data from 2013 does merit some caution.

TV use is recorded by a measuring device called a '**Peoplemeter**', which (similarly to the Mediawatch) recognises the station through audiomatching. With TV, the transmission signal is used as audio source and compared to the data collected through Kantar Media. The panelists and any guests have to register with the Peoplemeter before and after TV viewing, so their consumption may be assigned accordingly. The panel comprises some 1800 households.

Since the 2013 switch, attempts have been made to record **time shifted TV usage** as well as use on digital end-user devices such as PC, tablet or smartphone. However, the usage data on digital end-user devices have not been reliable enough to date, which is why no data on use beyond the television set has been published. This state of affairs should be addressed however, as has been recommended by the Federal Media Commission.(6) Furthermore, some thought needs to be put into a solution for capturing the use of TV content outside the house, such as at 'public viewings'. Sweden is the first country to have certified the ratings of video content on end-user devices other than television sets.(7)

1.2. Print Media

Data on **print media use** is collected by the **WEMF** on the basis of interviews. The official reach of newspapers and magazines is published every six months. Alongside these figures, at the same time or shortly after, additional details are compiled from the same people, with the National Readership Survey, **MACH Basic**, forming the basis for further studies in a modular design. Amongst the most important are the **MACH Consumer**, a consumer media study surveying consumers' behaviour in various areas. The WEMF also publishes the **MA Leader**, concentrating on the professional decision-making powers and consumer behaviour of individuals in leading roles. Alongside this, specific studies are compiled, such as the MA Strategy, the MA Radar and the MA Sponsoring, primarily geared towards the marketing and advertising sector.

Every year, some 19,000 individuals are surveyed for the **MACH Basic** study, half over the telephone and using demonstration materials (CATIplus) sent in to respondents ahead, the other half via an online questionnaire (CAWI). This yields reader contacts, **reach** and other recognised parameters of Swiss print media. Follow-up interviews are sometimes conducted to gain single source data. The universe is made up of individuals from the age of 14 upwards resident in Switzerland or the Principality of Liechtenstein. They also have to be sufficiently assimilated to the local language spoken where they live. In linguistically mixed areas along linguistic borders, the surveyed are free to select the language they prefer. Data is collected both on print and online editions (ePaper / replicas).

1.3. Online Media and Social Media

In Switzerland, the first initiatives towards **internet use research** were launched by the WEMF and from 2000 onwards by the SRG. For a few years several different measuring systems, such as Nielsen NetRatings or MMXI, existed side by side, and it was only from 2006 onwards that **NET-Metrix** started with the usage research as we know it today.

The use of internet content, first and foremost of news sites, is surveyed on the basis of the actual access as shown in the NET Metrix Audit (**site-centric survey**). The website hosts have to integrate a piece of code ("tag") into their website, allowing them to keep count of each access. For NET-Metrix Profile (**user-centric survey**), the NET Metrix Audit survey is enhanced with socio-demographic data from onsite questionnaires (users / idents of websites receive an invitation to take part). Criticism of the quality of the NET Metrix data has come from media agencies such as ZenithOptimedia.(8) The data collection suffers from plenty of deficits, most of them not unique to Switzerland but relevant to this field of usage research in general, (a) from the non-participation of important agents such as

Google or Facebook, (b) through the acceleration in technical advances to (c) the fast migration of user streams.

The collection of usage data for **Social Media**, as a recent field of research, cannot yet rely on professional measuring systems that would be widely accepted across the sector. There are plenty of challenges and stumbling blocks in the collection of data. While providers such as Facebook or Google offer their own performance data, they lack transparency and independence, which is why these services attract criticism from advertisers.

1.4. Organisational Forms in the Sector (JIC – MOC – OS)

As a rule, currency organisations are either conceived as a **JIC** (Joint Industry Committee), an **MOC** (Media Owned Committee) or as an **OS** (Owned Service). The leadership of the JIC is split between representatives of the media companies/associations, the agencies and the advertisers. In contrast, the executive level within the MOC consists exclusively of representatives of the media companies and associations, while an OS is led by the market research company that collates the media use study data – while JICs and MOCs usually contract external market research institutes to collect data.(9)

In practice, the usual procedure in all three forms of sector organisation is to set up a technical committee to assist and advise management and to clarify methodological details with the executive institute or institutes. This committee includes representatives of the media companies, the advertising/media agencies and the advertising industry – and additionally in some countries, external scientific consultants and/or the regulator. The advisory committee allows the perspective of the advertising sector to be considered in organising the currency study in MOCs and OSs too – if often not to the same extent as in a JIC.

Currency organisations are charged with organising and supervising the measurement of usage and publishing their data. As data are considered currency in the advertising industry the confidence of market players in the quality of the data is of great importance. Thus it is the goal of the currency organisations to build up and to strengthen this confidence through transparency, neutrality and the deployment of accepted quality standards.(10) In the view of the World Federation of Advertisers (WFA) and the European Association of Communications Agencies (EACA), the best way to achieve this goal is through JICs. As the executive boards of the JICs are composed of the central players in the advertising market, a JIC should find it easier than an MOC or an OS to recognise and consider the wishes of all market participants. This makes the JIC in the eyes of the WFA and the EACA the most recommendable organisational method for collecting usage survey data.(11)

The funding models of the currency studies differ between individual countries. Usually the media owners will meet the major part of the costs of a JIC or MOC. Income from data sales to third parties are usually distributed amongst members using the same formula. While JICs and MOCs are usually non-profit organisations, an OS has a for-profit orientation.

Analysis shows that, in practice, the **borders** between the forms of research organisation

within the sector are fluid and occasionally blurred. Some organisations that consider themselves a JIC could, according to the definition, be called an MOC. Other organisations, in particular those with a low level of formalisation, see themselves as neither an MOC nor a JIC. The forms described here should be understood as **idealised types** that in practice do not always exist.

1.5. Challenges for Cross-Media Approaches

The present study shows that hardly a single country has introduced a usage currency that could be applied **across the media** – based on a Total Audience study representative of the population, integrating all relevant services of the overall market. The Austrian Media Server Study, published in 2017, does come close to this idea, but it took great effort, as experts commented with a sigh. Other countries too boast some useful approaches, but without finding broad application and acceptance with the important players. The faltering development of an innovative, cross-media usage currency surprises for two reasons. On the one hand, the advertising industry has been clamouring for years for such a currency. On the other, in many places, and Switzerland is no exception, the official media research authorities have access to the corresponding budgets to push the development of such a media usage currency. The SRG for instance has put together an internal solution for their own platforms on the basis of technology provided by comScore, an internet market research company.(12) On the US market, Nielsen, one of the biggest market research institutes in the world, offers data on the use of audiovisual contents that remain on digital video recorders or other end-user devices for a little over 30 days.(13)

The problems are not only confined to low innovative drive. The organisational and methodological challenge to establish a purer-than-pure **total audience** currency study on the market should not be underestimated. Such a study has to be well-designed, comprising in a best-case scenario all **media brands** across all genres, as well as the brands' distribution channels. It should also preferably be designed as a **single-source study**, meaning that one single individual responds to all relevant questions (on degree of familiarity, use, perception etc.) on every single medium. With traditional survey methods this is near-impossible to achieve in a useful timeframe, and many of today's category-specific studies ask for more than their fair share of participants' patience and stamina.

The second major obstacle for sophisticated Total Audience approaches – which should comprise at least print, radio, TV and online media – is how to define **standardised user data** across the different types of media. The measurement parameters used in established category studies may at best be comparable with some qualifications (e.g. print and radio reach), but often they behave like the proverbial apples (reader contacts in print media) and pears (page impressions on websites). Usage indicators in total audience studies, however, have to measure success with the audience across different types of media reliably and in the same way, to enable direct comparisons across the category boundaries. This universal measurement also has to convince the media and advertising sectors through high informative value or suitability for practical application.

In Switzerland too, some faltering steps have been undertaken on the way from separate studies to cross-media approaches: since 2011 the **WEMF's** own **Total Audience** study has included an overall reach of Swiss **print brands** and their associated **internet channels**. For this, user data of the existing MACH analyses are combined with the NET

Metrix Profile figures. The approach integrates only two media categories, representing the range of the industry research organisation for print and its online subsidiary. Unsurprisingly, this places limitations on the use and acceptance of the study in the advertising industry. It is only truly relevant to campaigns with the identical cross-media combination of print and web media.

In other countries too usage research usually begins and ends **within the category**.⁽¹⁴⁾ The reason is often that the relevant industry organisations – such as those in Switzerland – are usually limited to one sector. They would have to work with organisations from other sectors, with all the effort that entails – always assuming a mutual interest in integration exists. In many smaller countries the question arises as to whether there are enough available resources for this. There are, however, countries where the currency research in all sectors is headed by a single organisation – such as the Centre d'Information sur les Médias (CIM) in Belgium.

1.6. Future Developments

The two big players in Swiss currency research, Mediapulse and WEMF, are going beyond sector boundaries with a common project aiming for a comprehensive Swiss Total Audience study, the **Swiss Media Data Hub**. Franz Bürgi, former CEO of Mediapulse, states in an interview with the ZenithOptimedia agency⁽¹⁵⁾ about the Swiss Media Data Hub that **online no longer represents a medium as such**, but rather a convergent distribution channel for a variety of contents, facilitating the differentiation in image, text, audio and video. The way to the user becomes less important, based more on a **media brand** than on a media category. At this point it remains unclear how a common currency may be identified – as an aggregate of existing studies or in an overarching form. It is clear, however, that the existing studies will be continued.

What is becoming ever more important is **data fusion**, where existing data are enhanced with additional information. The continuously increasing amounts of data ('Big Data') require more profound mathematical-statistical and technical as well as IT skills. A potential problem is the small number of international corporations, such as Google and Facebook, with appropriate opportunities to collect, and most of all use, data to match, with the resulting market effects and dependencies.

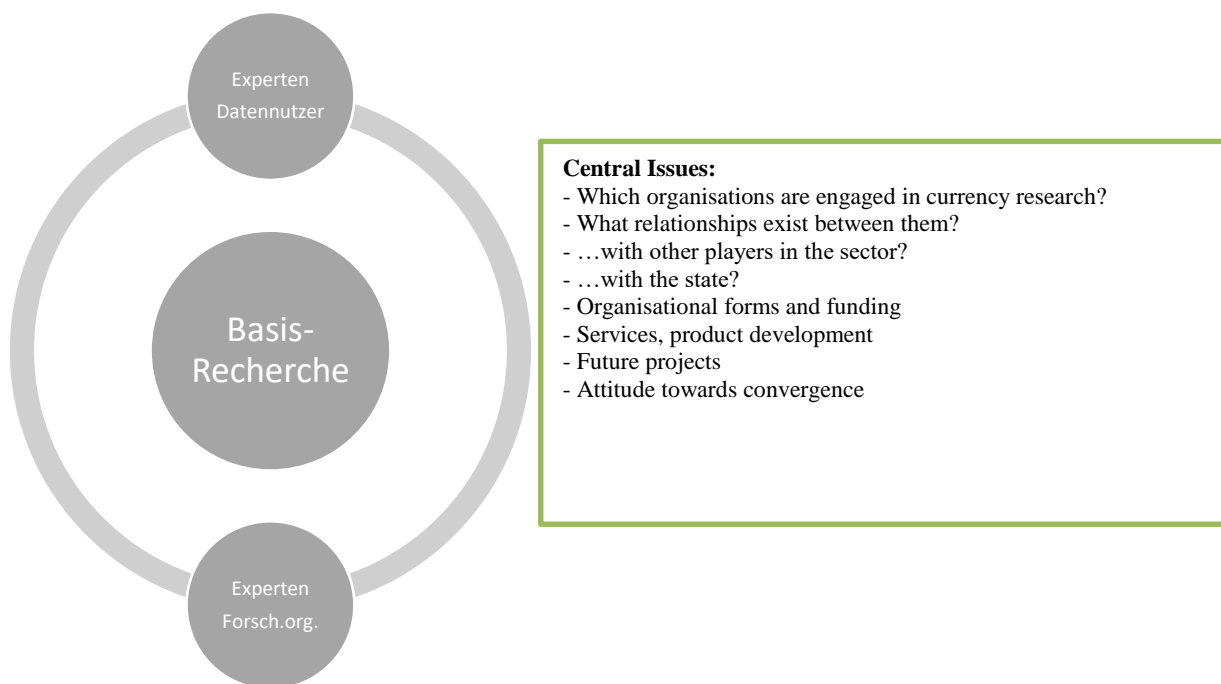
Another problem is the **advertising avoidance strategies** on the part of recipients. Often quoted examples are the fast-forwarding of TV advertising or the use of ad blockers on an internet browser. A further issue is the **decoupling of advertising and content**, meaning that advertising and editorial content no longer have to or can be used in conjunction. With 'targeting', for instance, advertising is distributed following target group criteria, independently of the context provided by content. These trends may have an effect on the interests of the advertising market: at some point that market will no longer be interested in elaborate user research to the same degree as the media sector. This could mean that some funds for research are no longer made available, and advertising ("campaign research") and advertising vehicle research ("audience research") might decouple. This would call into question the entire currency research, whose goal it is to establish trust between the media and advertisers.

Alongside the pressure of increasing digitalisation and mobility, the most important **methodological developments** in currency research are moving in the direction of more frequent and faster surveys, which are also becoming more detailed and comprehensive. In an ever faster-moving world, an advertising client requires more up-to-date performance data on the table, going as far as real-time tracking. In Brazil and other South American countries real-time audience ratings have been standard for a while already.(16)

2. Approach and Methodology

2.1. Project Design and Approach

Diagram 1: Project Design



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The present study on the international situation of currency research was conducted as a **country comparison** by means of two empirical design steps. The foundations of basic research were laid in the shape of literature and document analyses. These were then complemented by a survey of experts from the various countries. On the one hand, those representing the relevant research organisations were surveyed about issues of an organisational and strategic nature, while on the other, stakeholders, i.e. advertising buyers, media and advertising agencies, were surveyed using the data provided by the media research organisations. In the latter group the survey was focused on the requirements of the data users and their assessment of the performance of the research organisations.

2.2. Selection of Countries for Comparison

The first step, in agreement with the client, was defining the **countries for comparison**. The selection was made according to the following **main criteria**. The countries should show structural similarity with Switzerland in at least one of the following characteristics: small country status/population size, multilingualism, neighbouring countries with strong media systems and significant 'overspill' (next door giant), institutionalisation of the media system following dual principles (broadcasting system with strong public players), a democratic political constitution, and a liberal media legislation. Alongside structural similarities with Switzerland, the selected countries should ideally show best-practice potential in the area of innovative media and media research development.

1. Emphasis on Europe: the neighbouring countries are posited for their geographical proximity. Additional countries were those displaying structural similarities with Switzerland, particularly in terms of multiculturalism, small-country status and media system. In Europe the following countries were selected:

The neighbouring countries **Germany, Austria, France and Italy** – these countries produce a significant proportion of the foreign programming consumed in Switzerland. In terms of multilingualism and population size, **Belgium and Ireland** share structural similarities with Switzerland. **Denmark, Sweden, the Netherlands and Norway** are comparable to Switzerland in terms of population size, but also as regards their media system (comparatively high share of print media and strong public service media). **Great Britain's** relevance lies in its role as the 'mother country' of public service broadcasting.

2. Supplementary non-European countries: alongside the aforementioned selection criteria the study was also aiming for a broad geographical coverage across all continents. To achieve this, six countries outside Europe were identified:

The **USA**, as the nation where currency research was born, boasts the longest tradition of media use research. Furthermore, the media system is broadly diversified, in the area of digital media in particular. Thanks to its bilingualism and proximity to a big neighbour (the USA), **Canada** shows analogies with Switzerland. **Brazil** boasts the strongest media system in Latin America and distinguishes itself through innovative approaches in media use research. **South Africa's** media system is the most sophisticated on the African continent, with a long tradition in the area of currency studies. In the area of digital media and mobile applications in particular, **South Korea** is considered a major leader. Home to technology giants such as LG and Samsung, and at the forefront of technological development, it also boasts a broadly diversified media system with public and private radio and TV stations, as well as a diverse daily press. In terms of the Oceanic area, the study chose **New Zealand**. As a small country with two official languages, New Zealand shows certain analogies with Switzerland, with a media system where both public and private (electronic) media operate.

Table 1: Overview Criteria for Selection of Countries

Country	Criteria						
	Population	Languages	Next door giant	Dual Media System	Political System	Liberal Media Legislation	Best Practice
Germany							
France							
Italy							
Austria							
Belgium	+	+	+	+	+	+	
Ireland	+	+	+	+	+	+	
Denmark	+			+	+	+	
Netherlands	+			+	+	+	
Norway	+			+	+	+	
Sweden	+			+	+	+	
UK		+		+	+	+	+
USA					+	+	+
Canada		+	+	+	+	+	
Brazil					+	+	+
South Africa		+		+	+	+	
South Korea				+	+	+	+
New Zealand	+	+		+	+	+	

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Neighbouring Countries

2.3. Literature and Document Analyses

To start with, literature and document research obtained the basic information from the different countries. This **basic research** comprised information on media use research organisations that was obtainable from public sources (internet, annual reports, statutes, industry reports, etc.):

- Organisational form, structures, responsibilities, size, tasks
- Turnover, activities and services
- Funding
- Relationship to industry associations and state bodies

2.4. Expert Interviews

In the first instance, **structured expert interviews conducted over the phone** with members of the management of the relevant research organisations served to fill gaps in the available information. Beyond that, the information on the organisations' funding was – as far as possible – completed or filled in, and strategic questions asked in relation to the future shaping of media use research. The following issues took a prominent position:

- Funding and marketing concepts (participation of media companies, sale of studies and data, product development)
- Collaboration with other organisations engaged in media use research
- Attitudes towards the issue of convergence
- Current topics, important future projects

This insider perspective on organisations was juxtaposed with a country-specific external perspective. For this, selected industry players were surveyed in their role as users of media research data (media firms, advertising buyers, media and advertising buyers). The selection of interviewees was made through the relevant national industry associations (publishers, media firms, advertising industry). The following subjects were dealt with:

- Industry requirements towards the organisations in charge of media use research
- Level of satisfaction with the services
- Most important current issues in currency research
- Demands for the organisations in connection with the convergence issue

The **interviews** were conducted between November and March, in German, Italian or English. For data-protection reasons no recording was made. Instead, notes were taken during the interviews and partly transcribed. In some cases the respondents preferred to reply to the questions in writing, by email. In several cases a planned interview had to be dropped, as the respondent did not reply to the written questions despite several follow-ups or no date for a conversation could be found.

Generally speaking, the evaluation of the **external view** revealed certain issues. As most of the industry representatives contacted are involved in currency research, hardly anyone wanted to say anything negative on the subject. A few intended interviewees from the sector explicitly refused to take part. In fact, these stakeholders did not contribute much in the way of new information. The knowledge gained from these interviews was accordingly low, resulting in the cancellation of several planned interviews. Instead, the research was extended to include specialised media in the communications sector and relevant debates in the applicable national daily press, which yielded more controversial information complementing the external view.

Little information was available on the subject of the currency organisations' funding and costs. Hardly any currency organisation publishes an annual report, and relevant questions in the interviews remained mostly unanswered. Thus, the organisations charged with ensuring transparency in the advertising market maintain – at least with regards to their own finances – a surprising lack of transparency.

Table 2: Expert Interviews

Expert Interviews Inside View	Structured telephone expert interview or email survey Target audience: media research organisations' management Number of interviews conducted: 24 Duration of telephone interviews: 15-90 minutes Languages: German, Italian, English Key-word transcription of the interviews
Expert Interviews External View	Structured telephone expert interview or email survey Target audience: industry players and industry association representatives (media, advertising industry) Number of interviews conducted: 12 Duration of telephone interviews: 10-20 minutes Languages: German, Italian, English Key-word transcription of the interviews

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2.5. Presentation of Results

The results are presented as short country profiles (chapter 3) and in tabular form (chapter 4). The country profiles include both the results from the basic analysis and those from the interviews. The interviewees were assured that their replies would be used in an anonymised fashion in the report, which is why information obtained from the interviews were not marked up as such in the text. The majority of the information from the primary analysis was taken from the currency organisations' websites and participating industry associations. In the interests of readability, these sources have been kept out of the running text. They are, however, listed in the tables in chapter 4. Where the information comes from third-party sources, this is made clear in the text.

3. Results

3.1. Neighbouring Countries

3.1.1. Austria

With just under 9 million inhabitants, Austria is roughly the same size as Switzerland; however, it has only one official language, German. This characteristic, together with historical reasons, make the **media system** less diverse and heavily influenced by the big neighbour, Germany. The **press market** is highly concentrated.(17) As of 2010 there were 15 daily newspapers still in print, with a majority owned by German publishing corporations.(18) The market is dominated by the Kronen Zeitung, a tabloid published in various regional editions, with an overall print run of around 850,000 copies.(19) As is the case in other countries, the overall print runs of daily newspapers are in marked decline.

Broadcasting is dominated by the public service ORF and its four national television channels, as well as three national and nine regional radio programmes. In both the radio and TV markets, the ORF enjoys a relatively high market share. In TV, there is significant competition from public service and private programmes from Germany. Since 2005 the market share of the foreign broadcasters has risen by about 10% to reach above half. The market share of imported German programmes with advertising slots geared towards Austria stands at 24%.(20) In the TV market, domestic private stations play a fairly limited role. The radio market features 14 non-commercial radio stations plus a number of private radio stations. The private station with the strongest reach, KroneHit, belongs to the Krone Verlag publishing house.(21)

Both the ORF and the private media have an internet presence through online portals.

The **regulation** of electronic media is the responsibility of the independent authority KommAustria (Kommunikationsbehörde Austria) with the support of RTR GmbH (Rundfunk und Telekomregulierungs GmbH), a limited company which is in federal hands. The Chancellor's Office is in charge of supervising the regulatory authorities. The regulatory authority is not responsible for the area of currency research.

Currency research is organised by media categories. In Austria, the relevant organisations are organised either as an MOC or as a JIC. **TV research** is organised by the TELETEST (MOC) working group, founded in 2005. TELETEST is an association with representatives from the ORF as well as the major private TV stations and marketers. Implementation has been outsourced to the GfK, which uses an electronic measuring device (GfK Meter) in a panel to measure usage.

Founded in 1993, the Radiotest (MOC) working group is responsible for **radio currency research**. Members are the ORF and the marketers of the major private radio stations. The research is carried out as a CATI survey by the GfK. In 2016 it became known that over several years the GfK had manipulated listener figures in favour of the ORF, without their knowledge.(22) The case generated a lot of discussion and legal argument with compensation claims, for which negotiations are ongoing. Trust in the media sector and the private radio broadcasters in particular suffered significant damage.(23) In 2017, the contract with the GfK ending in 2018 is to be put out to tender.

The currency research for **print media** is the responsibility of the Media-Analysen (JIC)

working group, founded in 1965. The working group is made up of members from the press publishing houses and other media companies, as well as the media agencies, while execution of the study has been transferred to the GfK Austria and the IFES and HTS institutes. The investigation is conducted as a survey using a combination of methods.

The **online currency research** is organised by an association structured as a JIC (Österreichische Webanalyse, ÖWA). Founded in 1998 under the umbrella of the Österreichische Auflagenkontrolle (ÖAK) circulation survey, the ÖWA has been an independent association since 2001. Membership is made up of website hosts, media associations, public bodies and media agencies.

In 2012, various media and research organisations founded the **Media Server** association, with the aim of realising **convergence research** for print, radio, television, internet and out-of-home. For this, the data of the existing currency organisations were merged and complemented by an additional survey, with the first results published in early 2017. The parties involved call the project a tour de force with numerous obstacles, which they had been able to overcome. In late January 2017 it became known, however, that the ÖWA had announced its exit from the Media Server association as of the end of April 2017, for financial reasons.⁽²⁴⁾ This makes it uncertain how the online sector may be integrated into the all-media study.

The currency organisation for TV, TELETEST, is also facing the challenges of the changes in media use head on. In particular, plans for measuring video or streaming use take into consideration participating TV stations, but the system is also open in principle to other interested parties. In the test phase, for instance, one of the participants was a mobile communications provider.

As a general rule, the advertising sector stakeholders asked for their opinion are satisfied with the performance of currency research performance. The one exception is radio research, due to the aforementioned manipulations.

The Austrian currency organisations are small bodies who do not conduct their own operational activities but outsource the research tasks to third parties. In Austria, currency research is exclusively funded by the participating stakeholders, first and foremost the media companies, in relation to their size and position in the market. A large share is contributed by the ORF, which funds itself mainly through licence fee revenue. Occasionally public bodies appear as members of the associations in charge of currency research or as data clients. Apart from the ORF funds, no public monies are used for currency research in Austria.

3.1.2. Germany

With a little over 82 million inhabitants, Germany is the biggest **media market** in Europe. Due to language reasons and geographic proximity its influence on (German-speaking) Switzerland is considerable. Furthermore, many German media products are also used in German-speaking Switzerland. The German media landscape is diverse, but the press sector in particular is subject to concentration dynamics and structural change. In 2016 there were still 339 daily and Sunday newspapers. As measured by print runs, the ten largest publishing corporations boast a market share of around 60%. The concentration is

much more pronounced in the area of magazines and periodicals. Here, the five biggest publishing corporations own nearly two thirds of the market share. The newspaper with the highest circulation is the Bild tabloid, with 1.9 million copies sold. Since 1990 the circulation figures of the daily newspapers have decreased by over 30%. (25)

In the radio and TV sector, the public service broadcasters ARD and ZDF have traditionally enjoyed a prominent role. In the TV sector, the two licence fee-funded broadcasters attain a market share of 44%, while in the radio market the ARD stations hit as high as 55%. The most successful private providers of TV programming include ProSiebenSat. 1 Media and the RTL Group as well as Sky pay-TV. In the radio market, printing houses such as Burda and Funke are heavily represented. (26)

All the media companies mentioned above are active in the online market, albeit to differing extents, some of them with extensive information portals.

Regulation of public service broadcasters is the responsibility of the *bundesländer* (German federal states). However, the Interstate Treaty on Broadcasting lays down the objectives, while supervision is the responsibility of the broadcasting councils commissioned by the *länder*. Regulation of the private broadcasting sector also falls under their remit. To this purpose the state media authorities were established, to ensure that the service agreements are adhered to. (27) Usage research is not part of the regulation, however, although there is cooperation in some areas between the regulators and industry organisations, e.g. in the current pilot project surveying DAB+ radio use (see below). In addition, some state media authorities, amongst them the Bavarian Bayerische Landeszentrale für Neue Medien, which looks after new media, support the radio usage survey financially: these subsidies allow the study's case numbers to be augmented and give more validity to the usage results of smaller local radio stations.

In Germany, the organisations engaged in **currency research** are structured in the Arbeitsgemeinschaft Media-Analyse (**agma**) working group as a JIC. agma was founded in 1954 with the brief to collect data on print media use for the advertising industry. Today, agma brings together about 230 of the most important media companies, advertising and media agencies, as well as advertisers. The Bayerische Landeszentrale für Neue Medien is also a member of agma. Over the past 60 years, agma has evolved into a cross-media organisation, i.e. it forms the umbrella group for currency research across most media categories where advertising media plays a role. Various other organisations take part in implementing the research projects. Agma's own Media-Micro-Census GmbH (MMC Ltd.) conducts the readership and radio research, while responsibility for the TV and internet sectors lies with the AGF and AGOF working groups mentioned below. (28)

Since 1963 the public service broadcasters ARD and ZDF have been running joint TV usage research together. 1988 saw the foundation of the TV Research Consortium (Arbeitsgemeinschaft Fernsehforschung, **AGF**), which has subsequently been responsible for TV audience research carried out in conjunction with the GfK research institute, while Nielsen has been entrusted with measuring online streaming. Since early 2017 the organisation has operated under the name GF Videoforschung (Video Research), in consideration of the development of the media, and changed organisational form to a limited company. At the same time the AGF Videoforschung opened itself up to other companies. While previously ARD, ZDF, ProSiebenSat.1 and RTL were the individual shareholders, recently the two media firms Sky Germany and WeltN24 have come in with a

10% share. According to industry representatives, the AGF had become increasingly subject to criticism for its organisational structure and its cumbersome decision-making processes (with any innovation requiring unanimity). This made the organisation unable to meet the demands of an ever faster-moving media world. It was hoped that reorganisation would be a means to achieve a higher degree of flexibility. There had also been a measuring error in 2016 – the reach for Sky being shown as too low – leading to discussions within the industry, to the additional detriment of the AGF’s reputation.(29)

Since 1972, **radio research** has also been conducted under the aegis of agma. The usage data is gathered via telephone interviews (CATI), with two phases of questioning taking place annually. The interviews are conducted by the market research companies GfK, IFAK, Ipsos and Kantar TNS. In 2014 the MA IP Radio study was added to the MA Radio study. The latter uses log analyses to survey digital radio use, without yet doing so on a personalised basis, which is why the MA IP Radio is not suitable as a currency. Work is currently underway to amalgamate the two studies to create a combined (cross-platform) currency.(30)

Data on **print media use** have been surveyed since 1954 in the MA (media analysis) for daily newspapers and the MA for press media. Today, these are carried out via interviews in what is called the CASI method (Computer Assisted Self Interviewing). This is a personal interview, where the respondents themselves enter their answers on a laptop. In parallel to this a separate survey has been conducted since the MA 2015, where participants measure their time-based use of print media by means of scanning barcodes (MediaScan). The field studies are conducted by the market research companies GfK, IFAK, Ipsos, Kantar TNS and Marplan/Usuma.

For their part, the regional media authorities’ criticism is that MA Radio is not yet sufficiently inclusive. The regulator is actively committed to resolve this weakness of MA Radio. Since 2016, the state media authorities, together with ARD, Deutschlandradio, Media Broadcast and private radio stations have been working on a pilot study measuring DAB+ radio use. The results of the pilot project are intended to complement the MA Audio and MA Radio. With this project, which is being continued in 2017, the regional media authorities are working in close conjunction with the responsible panels at agma. Since 2002, the body charged with **internet research** (MA Internet) has been the Arbeitsgemeinschaft Online Forschung (AGOF) consortium, bringing together Germany’s leading online marketers. During the initial years the AGOF operated independently from agma, but since 2009 it has been operating under the aegis of agma, which is also responsible for the methodological part. The AGOF is the only one of the four German currency organisations that offers more than just their data for sale. Alongside another study on the representative use of websites, the opportunity exists to participate in seminars held at the AGOF Academy on issues of media planning and online commercialisation using the AGOF studies. In addition, the AGOF Service Center provides free consultancy services in connection with online advertising planning.

The aim of the **cross-media study** offered by agma and named MA Intermedia PLoS is to allow a cross-media comparison between the various media. This is a merged set of data (multiple-source survey) from the various MA surveys and the AGF-TV panel.

All currency organisations in Germany derive their main funding through contributions from their members or the media companies and licence fees for the use of the data. In the

case of the AGF, for example, the stakeholders pay a basic fee plus a contribution according to their market share. The currency organisations don't publish any figures on the volume of costs or turnover.

These currency organisations are flanked by other organisations providing data for the advertising industry, amongst them the German Audit Bureau of Circulation (Informationsgemeinschaft zur Feststellung der Verbreitung von Werbeträgern, **IVW**), which has been researching the circulation of newspapers since 1949. In addition, the IVW undertakes the auditing of commercials broadcast on radio and television stations, and evaluates access numbers on websites and apps. Last but not least, the GXL Panel was developed by the GfK with the support of Google for measuring the moving image, i.e. TV and online video. While the procedure is heavily criticised, on the part of the AGF in particular,(31) various market participants have expressed their confidence in its potential for the future.

Overall, AGF and agma enjoy a high degree of market acceptance, while due to the deficits mentioned above this is slightly less the case for the AGOF. Due to reservations about the AGOF and the increasing digitalisation of print media, the experts expect an increased significance of the IVW Online, whereas the IVW Print is expected to become less important in line with its sector. Faced with the dynamics of media use, discussions predominantly of a methodological nature crop up time and again. Most recently, voices from the advertising sector have been demanding a methodological change in print research, as the last media analysis (MA) showed an increasing reach for magazines at the same time as decreasing circulation, which is considered highly implausible.(32)

3.1.3. Italy

With its 60.6 million inhabitants, Italy is one of the most important European media markets. The overwhelming majority of the population speaks Italian, while the most important minority are the German-speaking South Tyroleans.

Italy's **media system** is dominated by the state-owned RAI (Radiotelevisione Italia) and by private broadcasting, subject to only a low degree of regulation. The print media plays a much lesser role. The number of national and regional daily newspapers does not reach 100 and print runs are often low, with the radio and TV stations much more numerous. There are around 370 national and over 700 regional and local TV stations(33), while there are innumerable radio stations. Despite the variety of providers and programming, Italy's mediascape has a relatively high degree of concentration. The field of TV is dominated by RAI, with a market share of just under 40%, and the Mediaset group owned by Silvio Berlusconi (Canale 5, Italia 1, Rete 4, amongst others) with 32% of market share. With regards to radio, the private providers taken together reach some 88% of market share. The biggest radio provider is the RCS Group. Both RAI and the private broadcasters are active market players with online portals. (34)

While RAI is heavily regulated and has to provide a broad range of services, the private providers only have to follow certain fundamental principles (e.g. consideration of diversity of opinion). The **regulatory authority** for broadcasting is the Autorità per le Garanzie nelle Comunicazioni (AGCOM). The AGCOM president is appointed by the Prime Minister, with the four commissioners put forward by the Senate and Parliament. Their election has to be

confirmed by the President as head of state. One aspect that is rather unusual in the European context is that the AGCOM is obliged by law(35) to set down the **framework and aims for currency research** in the broadcasting sector and to oversee compliance. In the event of problems or errors the AGCOM intervenes, investigates if necessary and issues requirements for the future, which is why, in the event of conflict between currency organisations and dissatisfied market participants, the AGCOM will often make an appearance. It is not unusual for the competition authorities or the courts to have to intervene. The organisations engaged in currency research have to report several times a year to the AGCOM. In contrast to Switzerland, the Italian broadcasting currency researchers receive no state funds, which is why various industry figures call into question the regulator's legitimacy to supervise the currency organisations.

In Italy, the organisations responsible for **currency research** occur as JICs, constituted in the shape of limited companies (p.r.l, i.e. plcs). This means participation by all the different sector players. TV research is the responsibility of Auditel, with Audipress looking after the printed press, and Audiweb in charge of the online sector. While these organisations are responsible for the relevant currency researches, they commission specialised research institutes to conduct them. Until 2011, **radio currency research** was in the hands of **Audiradio**, but this organisation was subsequently dissolved. The AGCOM noted that the quality of the research did not conform to the usual standards and there existed considerable structural and organisational flaws. As Audiradio was not able to implement the improvements demanded by AGCOM, the authority ordered their dissolution. In the wake of this, the GfK tried to set up their own business solution. Meanwhile it became clear that there was a need for a currency organisation endowed with the proper legitimacy. In April 2016 the RAI, major radio broadcasters and the radio federations presented the Tavolo Editori Radio (TER), which started work in early 2017 and is expected to produce its own research results within the year.

In the light of the prominent position enjoyed by the medium of **TV** in the consumer and advertising market, **Auditel** is the most important player amongst the Italian currency research organisations. The company has been collecting viewing figures since 1984, with the operation and execution in the hands of the market research institutes Nielsen and Ipsos. The latter gather their data from a panel comprising over 5,100 households. As in other countries, Auditel too is subject to pressure from the market and the stations concerned. When the broadcaster Sky tried to implement innovations this initially failed due to resistance from the dominant players RAI and Mediaset, whereupon Sky took Auditel to court for market abuse, with partial success.(36) More commotion was caused by a mistake in field planning in October 2015. Through a careless mistake in sending out emails to panel members the identity of participants became known, which resulted in them having to be replaced.(37) As there are constant concerns about Auditel's transparency, demands for a stock market flotation are a reality. This would result in Auditel being obliged to publish business figures in more detail.

The official **print media research** has been conducted since 1992 by **Audipress**. The methodological basis is a survey commissioned from the market research companies Doxa, Ipsos and Reply. Originally two different studies were carried out for newspapers and magazines. From 2017 onwards the data are collected together for all print media, not least for cost reasons. In order to maintain comparability with previous years, only small improvements and updates have been undertaken. While Audipress also collects data on audience use of the

e-print versions of the daily newspapers and magazines examined, it doesn't include an audience survey of other digital products, such as apps for example.

Since 2007, **Audiweb** has been collecting audience figures for the **internet**, with the execution of the research outsourced to Nielsen. The institute measures the use of websites by means of the number of accesses and combines those data with face-to-face interviews conducted in a panel. There are three panels, one each for PCs, smartphones and tablets. A future project forecasts the integration of Audiweb with Auditel, allowing for the recording of online use of TV programmes and other moving images circulated online. The dynamics of audience behaviour are also forcing Audiweb to adapt to market requirements. Details are expected to be made public over the course of 2017.

When asked, the experts are of the opinion that the **currency studies** for TV, print and web show a high level of quality, and that the panels are adequate in terms of size and depth. What is criticised is the unsatisfactory situation regarding radio. The new currency organisation TER has yet to publish data, while the solution offered by the GfK is considered a temporary solution. Another desirable feature would be a cross-media study integrating all media, ideally as a single-source survey. At the moment, however, there would be little prospect of success for such a solution, although the cooperation efforts on the part of Auditel and Audiweb are being welcomed as a first step in that direction.

3.1.4. France

As Switzerland's westerly neighbour, France, with its population of 64.2 million, is significant for western Switzerland in particular. This is where the influence of the French media system, especially in terms of electronic media, is heavily felt.

Sharing similarities with Italy, the **media system** in France is heavily influenced by electronic media. As is the case everywhere, the **print media** is fighting decreasing circulation and a loss of reach. In 2016, eight national and 67 regional daily newspapers were still being published. The biggest daily newspaper is 20 Minutes with 12 regional editions and just under a million copies printed. The paid-for newspaper with the highest circulation in France is the regional newspaper Ouest France with 680,000 copies. Most paid-for newspapers are sold individually, and quality newspapers such as Le Figaro or Le Monde still manage to sell 305,000 and 269,000 copies respectively.(38)

As in other European countries, the **broadcast system** has a dual structure. In the TV sector private broadcasters dominate – in terms of market share – following the privatisation of TF1 in 1987. TF1 as the strongest provider achieves some 22% of market share. The majority owner of TF1 is Bouygues, one of Europe's biggest construction corporations, with interests in telecommunications. Alongside the TF1 group, Groupe M6, majority-owned by the RTL Group, and the pay-TV broadcaster Canal+ rank amongst the most prominent private providers of TV programming. The state-owned France Télévisions integrates several TV programmes, of which France 2 and France 3 with 14% and 10% of market share boast the strongest reach. The state-run TV providers also run a few exclusive online platforms including francetvinfo.fr and francetvsport.fr.(39)

France boasts a lively and active radio landscape. While private stations have only been licensed since 1981, private stations geared towards the French market had been

operating for decades before. RTL and Europe 1 deserve particular mention, with both initially broadcasting in from neighbouring countries, and both remaining amongst the most popular radio stations. The private radio enterprises NRJ and RMC also attain high reach figures and market share. All in all French private radio stations reach an aggregate market share of 72%, with Radio France's state-broadcast programmes achieving 23%. The strongest state radio programme – measured by market share – is France Inter (9%), with Newsradio France Info also attaining a high reach.(40)

In France, both state and private radio and TV providers are subject to a relatively high degree of **regulation**. The body entrusted with this task is the Conseil supérieur de l'audiovisuel (CSA), whose members are appointed by the French president, as well as the presidents of the Senate and Parliament. Its tasks include youth protection, the protection of the French language and culture, the distribution of frequencies and, before elections, safeguarding pluralism (same air time for all candidates). The CSA can also claim a say in the composition of the boards of the public radio and TV stations, oversees competition in the media sector and acts as an arbitrator.(41) Currency research forms no part of its remit, as specifically stated in its decree dated 25 July 2006.(42)

The **currency organisations** comprise two organisations: one of the oldest in existence, today called Alliance pour les Chiffres de la Presse et des Médias (ACPM), and also Médiamétrie, in charge of currency research in the electronic media sector.

ACPM was founded in 2015; the result of a merger of the Office de justification de la diffusion (OJD), founded in 1922, and SAS Audipresse, it ranks amongst the oldest currency research organisations in the world. Primarily responsible for the **printed media**(43), ACPM is constituted as an association, and in the composition of its members conforms to a classic JIC, with representatives from trade federations of the newspaper publishers, advertising and media agencies as well as advertising clients. ACPM employs some 20 staff. The data collection, taking place in the form of CAWI and CAPI surveys, is conducted by the Ipsos Connect and Kantar TNS institutes, and national, regional and sector-specific data sets and reports are available. The data are published twice a year, with the data from the previous year becoming available in April. The activities are funded through membership fees and data sales.

The **Médiamétrie AG** emerged in 1985 from the state administrative department, the Centre d'études d'opinion. At the same time private radio stations were being licensed and TF1 privatised. Advertisers and the new private stations did not fully trust the newly created company, launching a rival to Médiamétrie, the Centre d'étude des supports de publicité (CESP). The dispute was won by Médiamétrie, albeit with a degree of compromise, in that 60% of the share capital was passed on to private players, while the other 40% remained with public organisations. The organisation is a public limited company owned by the industry. Today 35% of the shares belong to TV stations, 35% to the advertising sector, 27% to radio stations, and the remaining 3% to other stakeholders. The major shareholders are France Télévisions, Radio France, Union des Annonceurs, TF1 and the advertising agencies Publicis, Havas and Aegip. In 1992, CESP pulled out of the usage survey, but today still checks the currency studies in the form of audits.

Alongside the survey of data for radio, TV and internet, Médiamétrie offers ad hoc studies, as well as reports on various subjects and TV data from over 100 countries. Médiamétrie is also conducting broadcasting currency research in various African countries (incl.

Morocco, Senegal and Ivory Coast). The company also developed their own Personal Peoplemeter, intended to be deployed from 2018 onwards in France and Norway. In collaboration with ACPM and Affimétrie (outdoor advertising), Médiamétrie carries out a cross-media study. The **internet usage study** is conducted by Médiamétrie/NetRatings, a joint venture of Médiamétrie and Nielsen, who alongside the studies on internet use also conduct online advertising media surveys and other studies in the online sector. In 2015, the Médiamétrie group boasted a turnover of 94.5 million euros, employing 641 staff.

Due to the important position of the communications industry for the overall economy, Médiamétrie is heavily scrutinised by the sector and often criticised. One example is the radio research, which is currently still carried out in survey form. It became known that one station had manipulated the measurement results by implementing some programming steps before the survey.⁽⁴⁴⁾ One of the consequences has been that Médiamétrie turned more to evaluating alternative measurement systems and is planning to introduce a new electronic system in 2018. In a similar way to what happened until recently in Germany, further criticism is levelled at the organisation's structural inertia. Neither the NRJ Group nor the Groupe M6, two serious players in the French media market, are represented among the shareholders. Thus the self-interest of the existing shareholders stops new market developments from gaining due consideration.

3.2. Rest of Europe

3.2.1. Netherlands

While only a little bigger than Switzerland in terms of surface area, with a population of 17 million the Netherlands boasts more than double the number of inhabitants. The Netherlands is a monolingual country, surrounded by countries speaking a different language – with the exception of the Flemish-speaking part of Belgium – resulting in a largely independent media landscape. Foreign television programmes broadcast in the same language are only brought in from the Flemish-speaking part of Belgium.

Despite decreasing print runs and reach, **newspapers** in the Netherlands still enjoy an above average popularity, with daily newspapers reaching around 70% of the population. The daily newspaper market is relatively heavily concentrated. Since the Swedish Metro group shook up the market with a commuter newspaper in 1999, corporations from Great Britain and Belgium have also increasingly been looking for a slice of the Dutch publishing business. Alongside Metro, the strongest players include the Telegraaf Media Groep with its 'De Telegraaf' flagship, the British-owned Mecom Group which owns a string of regional newspapers, and the Belgian de Persgroep, owner of 'de Volkskrant' among others.⁽⁴⁵⁾ The high-circulation quality newspaper 'NRC Handelsblad' has also been part of a Belgian group (Mediahuis) since 2015.

In the Netherlands, private **radio stations** enjoy a long tradition. Radio Veronica started broadcasting as a 'pirate station' as early as 1960, playing the first pop music programme in Europe from a ship moored off the coast. Officially, private radio was only licensed towards the end of the 1980s. Today, there are 22 active private radio stations, with the most successful including Radio 538 and Sky Radio, both part of John de Mol's Talpa group, as well as Q-Music (de Persgroep). The public service stations of NPO (Nederlandse Publieke Omroep), who are present on the market with six national programmes, are an important player in the radio market. The NPO station Radio 2 has

one of the highest listener figures in the country.

In the **TV sector** the public service broadcaster Nederlandse Publieke Omroep (NPO), with its three programmes, occupies around a third of the market. The second-strongest group is RTL Nederland, part of the Bertelsmann corporation, which also operates several channels, followed by SBS Nederland, which at some point belonged to the German ProSieben Sat. 1 Media but since 2011 has been owned by the Finnish media corporation Sanoma and the Talpa group. Among the private TV stations with the largest audience are RTL 4 and SBS 6.(46)

The Dutch **regulatory authority** is the Commissariaat voor de Media (CvdM) in Hilversum, an independent agency affiliated with the Ministry of Education, Culture and Science. The agency is in charge of both the public service and private broadcasters, but their remit does not include currency research.

Nearly all **currency organisations** are organised as JICs, usually as not-for-profit foundations, and are housed in Amsterdam's Mediahuis, together with the industry associations. This spatial proximity is the result of a cooperation strategy striving for optimised levels of synergy.

In the Netherlands, the use of **print media** has since 2001 been surveyed by the Nationaal Onderzoek Multimedia (NOM), made up of four industry organisations: the federations grouping together newspaper and magazine publishers as well as advertising and media agencies. NOM publishes both a readership survey and a consumer survey. Print media usage data have for a while now been collected across all channels, after the former federation of Dutch publishers opened itself to other genres too, now trading as the Federation of News Media (NDP Nieuwsmedia).

Since 2001, the Stichting Kijk Onderzoek (SKO) has been in charge of currency research for the **TV** sector. SKO is organised as a foundation, to which the TV providers and the advertising federations belong (JIC). The survey SKO is responsible for includes not only traditional TV use but also TV content consumed online. Constituting a globally pioneering service on the part of SKO, these cross-platform, cross-media data are available on a daily basis.(47) Work on the TV panel is performed by GfK and Nielsen, the online measurement by Kantar TNS Nipo and comScore.

Radio is analysed through the Nationaal Luister Onderzoek (NLO), its execution being in the hands of the GfK. To date the survey has been carried out by means of sample polling and using the diary method, but for 2018 a change of methodology is planned, after various tests have been conducted with electronic measurement methods. The contract is to be awarded following a process of tender which was still ongoing at the time of going to print (31.03.2017).

Online currency research in the Netherlands has a chequered history. There have been various attempts that have repeatedly failed, for reasons of both an organisational-structural and a technical nature. The latest attempt is called NOBO (Nederlands Online Bereiks Onderzoek), a Media Owned Committee (MOC) started at the end of 2016 and deliberately structured as a loose entity. NOBO is supported and funded by 20 major media corporations with their own online platforms. Execution has been awarded to the institutes Kantar TNS and comScore.

The currency research organisations work together in various **forms of collaboration**, including, for instance, studies carried out jointly, such as the Crossmedia:Tijd, the Media:Tijd and the Media Standard Study (MSS). The Media:Tijd is a daily study surveying media use, the Crossmedia:Tijd consists of merged usage data gained from the four sectors, and the MSS provides the data on media use by category and place, also providing basic data for the survey of the individual studies. The currency organisations share a strong desire to collaborate, recognising that past thinking along category lines no longer corresponds to the reality of today's media use. The cooperation goes beyond methodological-technical aspects to include organisational issues as well. While there are no plans for the organisations to be merged, in the future it could be envisaged that they are placed under a shared leadership.

3.2.2. Belgium

Counting some 11.3 million inhabitants (2015) across a surface area of 30,528 square kilometres, Belgium ranks amongst the most densely populated states in Europe. The country is divided into Flemish-speaking, French-speaking and German-speaking communities. The Dutch-speaking Flemish, living in the northern part of the country, make up the majority of the Belgian population, while 40% of Belgians belong to the French-speaking community found in the south of the country, on the French border. Only around 77,000 Belgians (2% of the population) in the eastern part of the country are native German speakers. Despite the small size of the German-speaking community, German, alongside Dutch and French, ranks among Belgium's official languages.

The three communities are very different not only in a linguistic and geographical sense, but also culturally and politically. This divide is reflected in Belgium's federally structured and pluralistic **media system**. Each of the communities has their own media outlets, which cooperate little across the linguistic divide. Accordingly there is no national media, only media geared towards the relevant linguistic region, and yet mostly available across the whole country.

Each of the Belgian communities has their own public service radio and TV organisation. In **Flanders** the domestic public and private TV stations divide up the market amongst themselves equally, with around 40% market share each. Amongst the private stations the broadcasting group of the Belgian media corporation Medialaan enjoys a prominent position in the market. Despite the lack of a language barrier, Dutch broadcasters have difficulty establishing a foothold in Flanders, reaching a market share of only around 5%.⁽⁴⁸⁾

Wallonia presents the opposite scenario: here, the public RTBF attains a market share of only 24%, which makes it one of the public TV broadcasters with the least audience support Europe-wide.⁽⁴⁹⁾ The biggest domestic private station is RTL-TVI. In contrast to Flanders, a third of the market falls to stations broadcasting from the neighbouring country. TF1, the most popular French station in Wallonia, commands more than 15% market share. TF1's announcement that they are planning a Belgian advertising slot is currently creating plenty of commotion and debate about the economic viability of domestic private stations and the threat of staff cutbacks⁽⁵⁰⁾.

Belgium's **German-speaking community** boasts the smallest public radio and TV organisation in Europe, the BRF. There are no private TV stations and BRF is not a part of the Belgian currency survey, nor was any information on its market share of the German-language Belgian TV market made available even by approaching the station directly.(51)

The Flemish **radio sector** is characterised by a high degree of concentration. With a market share of 64%, the public-service VRT stations enjoy a dominant position. Only a few private stations have coverage across the whole of Flanders. The two private stations with the highest listener figures, Qmusic and JOE, are owned by Mediaaan. There are a large number of stations at local level; however, they belong to a small number of companies. In 2017, the Flemish community is planning to take steps against this concentration and rethink the distribution of frequencies.(52)

In the radio sector too, Wallonia shows a marked difference to the Flemish North: only a little over a third of listeners tune into the RTBF public service radio. More popular here are the stations belonging to the RTL and NRJ groups.(53)

The Belgian **newspaper market** has, to a large extent, been able to compensate for a decreasing readership in the print sector with an increase in online readership. The quality newspapers in particular are registering comparatively high online use figures. Most newspapers address only one of the three linguistic regions, and the newspaper market in all three regions is characterised by a strong level of concentration. In Flanders the market is dominated by the publications of the two Belgian publishing houses De Persgroep and Mediahuis.(54) In Wallonia, Sudpresse and Le Soir, owned by the Belgian Groupe Rossel, rank amongst the most-read daily newspapers.(55)

In the broadcasting sector, all three parts of the country have their own broadcast law, each with their own **regulatory authority**. The Vlaamse Regulator voor de Media (VRT) is in charge of the Flemish-speaking North, the Conseil Supérieur de l'Audiovisuel (CSA) is responsible for the French-speaking South, and the Medienrat (media council) for Belgium's German-speaking community. The three regulators are obliged to cooperate both amongst each other and with the regulatory authority for post and telecommunications. As independent organisations generally, their staff are not allowed to work for the government at the same time. An exception is the CSA, which employs an observer from the French-speaking community. The independence of the supervisory bodies is not helped, however, by the fact that all staff are appointed by the communities' government and parliament, and may equally be dismissed by them. Furthermore, the Belgian communities can, through budgeting, exert indirect pressure on the regulators. Each regulator is funded by their respective community, with only the VRT receiving additional funding through licensing fees.(56) The regulatory authorities have no formal relations with the Belgian currency research organisation.

Within Europe, the structure of **Belgian currency research** is unique.(57) There is a single currency organisation covering all sectors, in the form of the Centrum voor Informatie over de Media and the Centre d'Information sur les Médias (**CIM**). Founded in 1971 through the merger of two organisations for audience and readership surveys, this not-for-profit association is organised as a JIC.

CIM outsources the execution of the individual studies to research companies. Radio usage is measured by the GfK, and television use by the GfK (TV/panel) and Nielsen (time

logging). Television will soon be subject to a planned joint measurement of TV, TV advertising, online video and online advertising. To date, CIM is not entirely satisfied with the draft of what it calls Video Total solution, with some technical challenges to be resolved amongst other issues.

Figures on print use have been collected since 2016 by Ipsos. Awarding the tender to Ipsos also brought about the introduction of a new readership survey, which instead of the classic readers per edition provides an estimated daily readership figure for the print and online editions.

The internet usage survey was handed over to Gemius in 2000. Registered sites/apps are measured by three panels (one each for PC, tablet and smartphone). In future the plan is to integrate non-registered websites as well, including both foreign and non-commercial sites.

The CIM CrossMedia **convergence study** was first conducted by the CIM in 2012. For this, all currency surveys were merged with data from a consumer study, the TGM.(58) The CIM CrossMedia was last carried out in 2015 and is currently being revised. According to the CIM, the convergence study in its previous form was too complicated and did not yield sufficiently reliable data. Therefore the ultimate goal of a cross-genre currency is still some way off. While the CIM does not want to lose sight of cross-media perspectives, in the immediate future it will initially focus on a cross-platform perspective for each individual category.

In 2014 the CIM established the 'CIM 2020' project group. Its brief is to make suggestions as to how the CIM might in future respond better to the demands of a changing media world and the requirements of advertising clients.(59) One important strategic change has already been implemented: as the classic management board had proven too limited and inert, a dedicated decision-making committee was introduced for each media sector within the CIM. These committees are comprised of representatives of the media companies, advertisers and agencies, as well as from CIM's permanent staff. They conduct monthly coordination meetings and supervise the respective currency studies.

Generally, the satisfaction of the Belgian stakeholders with the currency studies has been relatively high. However, over the past few years they have increasingly confronted the CIM with contradictory demands: while some would like to initially hold on to traditional forms of organisation and survey, others are in favour of taking the development further with the utmost speed. (6)

3.2.3. Denmark

While Denmark is a little larger than Switzerland in terms of surface area, its population of 5.7 million only equates to the number of inhabitants of German-speaking Switzerland. The Danish **media landscape** is one where the press and public service broadcasting occupy a strong position. At national level, the media show relatively little differentiation, with a stronger segmentation at local level.

With regards to its **TV market** Denmark is considered a special case, with Danmarks Radio (DR) representing a national TV and radio broadcaster financed through fees. In addition, the regional offshoots of the private TV station TV2 – unlike their national main TV2 station – fulfil a public broadcasting mandate and are supported by public funds. In 2016, the market shares of TV2 and DR stood at about a third each. The remaining third is shared between foreign broadcasters and Danish private stations. As the neighbouring countries' broadcasters don't generally transmit their programmes in Danish, they represent less of a rival to domestic broadcasters (lesser spill-in) than is the case, for example, in Switzerland.

In the national **listener market** the public Danmarks Radio occupies a dominant position, with some 75% of market share. Faced with the DR, private competitors have a difficult time. Amongst Denmark's approximately 100 local and regional private radio stations, those belonging to the German Bauer Media Group play a central role, capturing nearly 20% of the listenership.(61) The national private stations were only introduced in 2003 and have not been able to gain much of a foothold in the market.

The strong position enjoyed by DR is often criticised in Denmark – in particular by representatives of the private broadcasters, but also by the print media, faced with the online competition presented by the DR stations. According to a recent study, 47% of news journalists are on the state's payroll. In Norway (37%) and Sweden (26%) this share is significantly lower.(62) The same study warns that the Danish state might in the future exercise too much influence on broadcasting. In November 2016 the Danish government presented a report aiming to curb DR's position of power and to privatise TV2, in the shape of several different scenarios.(63) As this has been attempted before, there is scepticism as to whether it will in fact be carried through.

By contrast, Denmark boasts an extremely pluralistic **newspaper market**. In 2016, there were some 40 regional and local newspapers alongside eleven national newspapers. The most popular daily newspaper, with a readership of 484,000, is the MX/Metroxpress freesheet.(64) Owned by Tamedia, it is similar to the Swiss 20 Minuten. As in other countries, in Denmark the print media readership figures have dropped over the past decade. Between 2010 and 2015 the number of readers of daily newspapers declined by 26.4%, with the strong downward trend weakening in 2014. From 2014 to 2015 some newspapers even regained users.(65) The use of newspaper websites is also rising continually.

The Danish **regulator** in the broadcast sector is the Radio og tv-nævnet, the Radio and TV Council. The council forms part of the agency for culture and palaces, which in turn forms part of the Ministry of Culture. The advertising media research does not fall within the Radio and TV Council's duties and regulatory remit. However, the Council could exercise indirect influence on currency research: if the annual reports filed by the public broadcasters DR or TV2 should show unacceptable figures, the regulator could in theory attempt to influence the survey methods. In practice, this case is extremely unlikely.

Denmark has no institutionalised, central organisation governing media usage surveys, like, for instance, Belgium's CIM. However, the execution of the entire Danish **currency research** is centralised in the hands of Kantar Gallup, the largest market research firm in Denmark.

In the **TV sector**, the currency survey Kantar Gallup Seer-undersøgelsen (previously: TNS Gallup TV-Meter) looks at the eight largest TV networks. Their representatives are organised in a steering committee as an MOC, where all members – independent of the size of their station – enjoy the same voting rights. The MOC commissions a market research organisation to conduct the study, controlling its execution, with the study funded by the leading TV stations. If Kantar Gallup later sells the data to third-party users, the stations receive a percentage of the sale. In early 2017 the study was, in collaboration with Kantar Gallup, adapted to modern requirements, adding the measurement of the use of streamed and time-delayed TV content, as well as usage on all (mobile) devices.

Danish **listening figures** are gathered through the TNS Gallup Radiometer and in the Gallup Lokalradio Index. The former measures radio use at national level via the Peoplemeter, while the latter focuses on local radio, hence the name, and is based on a CATI survey. The client is an MOC, consisting of the public DR, radio stations belonging to the Bauer media group, as well as private, regional and local radio stations, represented by Danske Medier. The survey is funded, as with the TV study, through the clients and (potential) data licencing fees. At the moment the measurement of online and podcast usage are still at the experimental stage.

The **readership survey** has been conducted since 1997 as part of the Index Danmark/Gallup consumer survey. The study is headed by a JIC consisting of Danske Medier, as the representative of the publishers, and the agencies' federation. The Index Danmark/Gallup currency research is conducted using a survey. One criticism voiced over the past few years by advertisers was that Index Danmark was not taking into account sufficiently the changing reading habits of the Danish people, as data on online use was not collected. This is changing as of 2017, with the first results on e-newspaper use expected in September.⁽⁶⁶⁾ The Danish print sector organisation has one particularity: contract negotiations between the JIC and Kantar Gallup in 2001 instituted a Development Fund financed by both parties. This fund is used, for instance, to pay for experiments with new methods.

Another Danish particularity is Danske Medier Research. In principle, Danske Medier, the Danish media association, is only responsible for private media. In order to work with the public broadcasters a new platform for public and private media was created, Danske Medier Research. This organisation commissions the **online currency survey**: Dansk Online Index provides the key data on Danish internet use. Relunched in 2016, it is conducted by Kantar Gallup. In principle it is open not only to members of Danske Medier Research, but to any media firm interested in measuring their online use.

There has been, and still is, some overlap between the currency surveys. Some

members of the TV study's steering committee are also members of the committee in charge of the radio study and/or the online study. There have been several initiatives towards setting up collaborations between the currency organisations, as well as convergence studies. The attempt to merge the TV and radio studies failed however, one reason being that the public TV station DR has little interest in such a merger. A close collaboration with the radio study's steering committee would mean that Danske Medier, with a tendency to be critical of DR, would gain influence on the viewer research.

3.2.4. Sweden

With around 10 million inhabitants, Sweden has a slightly larger population than Switzerland. Stretching across some 450,000 km² however, in terms of surface area Sweden is significantly larger. While the official language is Swedish, there are small linguistic minorities. As the most populous country in Scandinavia, the Swedish media economy boasts better conditions than the other Scandinavian countries, also resulting in a higher degree of media diversity.

The **print market** in Sweden is still highly diverse, even though paid-for newspapers have suffered a decline in circulation. In 2014 there were 84 daily newspapers, of which four were national.(67) One particularity of the Swedish newspaper market is the continued existence of morning and evening newspapers. The morning ones, unless they are commuter newspapers, are mainly distributed through subscription. The biggest subscription morning newspaper is Dagens Nyheter, which belongs to the Bonnier media corporation, a family-run firm dominating the Swedish media landscape. The other morning titles are Metro (free) and Svenska Dagbladet. The Aftonbladet and Expressen tabloids are published in the evening. Part of the Norwegian Schibsted Group, Aftonbladet is also pushing heavily into the audiovisual sector. Expressen belongs to Bonnier.(68)

Sweden's **TV landscape** consists of the programmes broadcast by the public service provider Sveriges Television (SVT) and private networks. In 2016 the market share of public programming stood at 31.5%, while in the same year TV 4, the largest Swedish private TV company (owner: Bonnier), reached a market share of 20.5%.(69) TV 4's portfolio of programmes includes several special-interest channels. The programmes of the Swedish Modern Times Group (MTG), which operates internationally, and the SBS Discovery Network, operating out of Great Britain, also enjoy a strong position in the TV market.

The **radio landscape** too has a dual structure. With a share of 77.7%, the four national programmes of the public Sveriges Radio (SR) station, P1, P2, P3 and P4, dominate the listener market.(70) There are also 27 regional public radio stations.(71) Since the 1990s there has been a noticeably pronounced economic concentration in the private radio sector, with most private radio stations today belonging to either to the MTG Group or the German Bauer Media Group. In March 2017, the market share of each group stood at 9.4% and 12.9%, respectively.(72) In 2013 the advertising income of private radio was only about a quarter of the receipts generated by public radio, or a tenth of TV advertising revenue. This means that, in contrast to many other

European countries, radio in Sweden represents a fairly insignificant advertising medium.(73)

The Swedish **regulator** is known as Myndigheten för press, radio och tv, i.e. the Authority for Press, Radio and TV. In the print media sector the authority is responsible for supporting the press, while radio and TV are subject to further regulations. These also concern commercial broadcasts in particular, which are regulated by the Swedish consumer authority. Sweden is well-known for having strict advertising guidelines in electronic media, especially with regards to publicity for alcohol as well as child protection. Audience research does not fall under the remit of Myndigheten för press, radio och tv.(74)

The **currency organisations** are organised in very different ways. Since 1992, **TV research** has been the responsibility of Mediamätning i Skandinavien (MMS). This is a construct halfway between an MOC and a JIC and organised as a public limited company (AB), where the media companies carry far more weight than the advertising sector. MMS is de facto owned by the four leading TV networks, the public SVT and the private groups MTG and TV4 as well as Discovery Networks Sweden. Each group holds 24% of the shares, with only four per cent owned by advertising sector organisations. The execution of the survey has been outsourced to the Nielsen and comScore institutes, with comScore responsible for measuring online use and streaming. Sweden's MMS started early on with the measurement of web and video content, and since 2010 time-delayed television has been surveyed too. In early 2017, MMS started identifying the use of the audiovisual web content of the tabloid (Aftonbladet TV) in comparison with the linear TV programmes and their web content. Funding for these activities is raised by selling data to media companies, media agencies and advertisers. According to experts, the implementation of innovations could proceed at a faster pace. They also expressed a desire for improved tools for data use. Other than that, the level of satisfaction is very high, with the sense of quality in particular achieving high approval rates.

The **radio listenership research** has been awarded to TNS Kantar Sifo on behalf of the public broadcaster Sveriges Radio and the private groups MTG Radio and Bauer Media. Between 1993 and 2005 the radio broadcasters commissioned a separate firm organised as an MOC for the currency research. In 2005 this was sold to TNS Kantar Sifo, who carry out two studies: the Radioresultat Nationell Radio investigates radio use through a technical measuring method (Portable Peoplemeter and server-side measurement) in a national panel, while the second study, Radioresultat Lokalradio, identifies the use of regional and local radio programmes and is still conducted through interviews (CATI). Experts recommend changing over to the technical measurement with local radio too, which would also bring about an integration of the two studies. The ideal would be a complete registration of all listening situations, including for instance with earphones.

Rather than being able to rely on a dedicated currency organisation for **print media** use, the study published by the commercial research institute TNS Kantar Sifo is being used as a base, whose results are broadly consensual across the sector. These are the ORVESTO consumer studies, first set up in 1969 and these days also

including cross-media aspects. Print media data form part of ORVESTO Konsument. Alongside this there are further sub-surveys covering various subjects. The survey is conducted for all studies under the name Sverige Nu (Sweden Now). The survey data on print media use are merged with the data from the radio and TV research to form one intermedia study. The ORVESTO studies are funded through data sales.

Currently there is much discussion about **online currency research**. The KIA Index (Kommittén för Internetannonsering), as it is known, is run by the Swedish federation of advertisers (Sveriges Annonsörer) in collaboration with the media federation (Tidningsutgivarna) and the federation of media agencies (Sveriges Mediebyråer). In organisational terms this is a JIC funded by the participating organisations and those running the surveyed websites. Essentially the index records access statistics, which have only recently started to be enhanced by demographic data through the AudienceProject company. Methodologically, the KIA Index is very controversial as it relies solely on census data. The disadvantage of this kind of data is that distortions resulting from non-human traffic or international access are not filtered out. In early 2017, these weaknesses caused an important player, the Schibsted Group, to leave, taking with it all the platforms run by them.

One solution would be to replace the KIA Index with a different currency. Here, it would be useful to draw on the aforementioned ORVESTO studies, which already feature an existing online panel. While this panel currently only records digital print use, it has the potential to be expanded. The firm currently dedicated to this expansion is the international comScore company, which in 2015 took over the ORVESTO Online Panel. By 2018/9 in all likelihood – and certainly once the MMX-MP has been introduced in Norway and Finland – the panel technology previously used will be replaced comScore's MMX-MP product.

With the exception of the KIA index, which lacks broad acceptance, the Swedish currency studies are generally accepted. The MMS in particular strives to integrate new developments early on, in order to meet market requirements. In 2015, the organisations engaged in currency research achieved an annual turnover of 63.6 million Swiss francs. This figure includes other market research services not associated with currency research.

3.2.5. Norway

Norway is a sparsely populated country, with 5.2 million inhabitants across a land area of approximately 385,000 km², making it about nine times the size of Switzerland. Thanks to oil reserves, the country is very wealthy. The majority of Norway is bilingual, with the two official languages Bokmål and Nynorsk sharing a fair degree of similarity. A few more minority languages are spoken in marginal areas, but the vast majority (85-90%) speaks Bokmål(75), with Nynorsk spoken mainly in the western parts of the country. Both languages are taught in schools, and the public service broadcaster NRK has to produce a quarter of its content in Nynorsk. There are a few dialects too, and on television and radio it is usually the particular local dialect that is spoken. The differences are often marginal, and as in German-speaking Switzerland the various dialects are comprehensible by most.

In the **media system** of Norway, **newspapers** have traditionally had an important role to play. In 2015 there were 228 titles, of which more than 70 were daily paid-for newspapers.(76) The range of titles has remained stable for years, not least thanks to an enhanced system of press subsidies. A large proportion of them are sheets with a local-regional perspective and relatively low print runs. As is the case throughout Europe, structural changes have led to strong economic concentration and local-regional monopolies. The Schibsted Group, owned by various international capital funds and investment banks, controls about a third of Norway's printed press run. Their portfolio includes Aftenposten, Norway's long-established and largest daily newspaper, Verdens Gang (VG) and Bergens Tidende as well as numerous online portals. Other major titles in Norway are the tabloid newspaper Dagbladet, the daily business newspaper Dagens Næringsliv and the regional newspaper Adresseavisen. With in places drastically decreasing print runs, nearly all media companies are concentrating their efforts on the internet.

Norway's **TV landscape** is relatively compact. The public service broadcaster Norsk rikskringkasting (NRK), which broadcasts three advertising-free national programmes as well as a children's programme, plays a central role. In 2016, the audience leader, the NRK 1 channel, attained a market share of 31%. The strongest private TV provider is TV 2, with six programmes across the station. The most successful private programme, TV 2, attains 18% market share.(77) The owner of TV 2 is the Danish media corporation Egmont. Other major private television providers include TV Norge/TVN (Discovery Communications) and TV 3 (MTG).

The **radio sector** is dominated by the public provider to an even higher degree than the TV sector: NRK broadcasts 16 advert-free programmes, achieving a market share of 68% in 2016.(78) The most important private radio broadcasters are MTG, which owns the P 4 Hele Norge network, amongst others, and the German Bauer Mediengruppe, which also runs several radio stations.

The **regulator**, the Medietilsynet media authority, forms part of the culture ministry and is responsible for all media. Part of the authority's brief is to issue broadcast rights and monitor the programmes for legal conformity, in particular in terms of advertising regulations. In the press sector the authority governs the allocation of funds. Technical issues regarding radio and TV are dealt with by the post and telecommunications authority (NKOM), including switching off the analogue signal and the transition to digital radio, which started in January 2017 and is scheduled to be completed by the end of the year. The authority's remit includes research on media use, but not advertising media research in the sense of currency research.

Comprehensive media use data are provided by the Norwegian statistics office Statistisk sentralbyrå (SSB). The SSB has been collecting data on media use since 1991 and provides the public with access to them in the shape of the Norwegian Media Barometer. In this respect there is an official cross-media study with comparable data across the media categories. However, the data are only available at category level, not at brand level. The study is funded by the Ministry of Culture.

In Norway, **currency research** benefits from having simple structures. A single company leads the work across all categories. Thus, there are no category-specific currency organisations, and the relations between media firms or their federation and the executing institute are merely contractual.

The commissioning entity responsible for **readership research** is the Norwegian media federation (Mediebedriftenes Landsforening, MBL), grouping together all the important players: publishers, radio and TV stations as well as media and advertising agencies. The contractor is the Kantar TNS institute, which carries out the readership research as part of a consumer study known as Kantar TNS Forbruker & Media (F&M, Consumer & Media). The print media study was established in 1988 on the initiative of the Norwegian publishers federation and has since then been conducted by Kantar TNS as a survey (CATI). The figures, comprising both the use of print editions and digital channels, are updated twice a year. The initial three steering committees for newspaper, magazine and digital surveys have now been grouped together into a central steering committee. As of 2018, the readership study is expected to employ a new methodological basis, guided by the Brand First approach and consequently reporting Total Reach data on online and offline use for newspaper brands. The study is funded by the participating titles – with smaller papers paying less than major ones – and the commercialisation of the data.

Until 1992 the **TV research** was entirely in the hands of the public broadcaster NRK. The admission of private providers led to the creation of a broader base. The Ipsos MMI institute had been in charge of carrying out the research, until in 2000 the task went to Kantar TNS, who will be responsible for it until at least 2023. Clients are the networks NRK, TV 2, MTG and Discovery Networks Norway or their steering committees for TV advertising. TV research is experiencing a period of change. Up to now measurement has been carried out in a household panel using an electronic device, but early 2018 should see the introduction of a Total-TV and video rating. This means that the user data on TV content on mobile devices and outside the home would be collected too. Initially the data collected are not intended to be merged; there is no official cross-media plan. A novelty is that the user data is collected in two panels: on the one hand the existing panel with the classic measurement on several screens, and on the other in a panel recording consumption outside the main residence. This is important, as a large part of the Norwegian population has a holiday house where TV is consumed too. The measurement of this use in the second panel is carried out through portable Peoplemeters provided by the French media research firm Médiamétrie. This procedure has already been deployed in radio research. As it records programme use by acoustic identification, it can equally serve for gathering data on TV use.

In Norway, official **radio currency research** only started with the emergence of private radios entering the market in 1991. While in the first years, the Synovate MMI institute was in charge of the survey, since 1995 Kantar TNS has been responsible for this research too. After an initial CATI survey, Kantar TNS has since 2006/7 been working with the technical measurement using the Portable Peoplemeter. Where there are small transmission areas or small stations where the PPM measurement does not yield a sufficient amount of data, the CATI survey continues to be used.

Radio research is commissioned by the networks NRK, MTG and Bauer Media.

Kantar TNS also runs – in collaboration with comScore – the Norwegian **online research**, the TNS Metrix. The Internet Panel (NIP) was created in 1996 and is described by the institute as the world's first web panel. This means it is not merely recording access statistics, but surveying the internet use behaviour of the population within a panel of representative composition. Its client is the Nettforum internet group of the Norwegian media federation MBL. In 2018 the panel technology used up to this point will be replaced by the comScore product.

The central organisation involved in Norwegian currency research, Kantar TNS, employs 129 staff in Norway and had an overall turnover of some 36 million Swiss francs in 2015. It was not possible to ascertain the share of currency research in this.

3.2.6. United Kingdom

With a population of 65.1 million, the United Kingdom is one of the largest media markets in Europe, with an international reach. While English is the dominant language at national level there are additional regional languages, including Welsh and Scottish Gaelic.

The United Kingdom's **media system** is considered to be one of the most diverse in the world, not least as players of worldwide renown such as the BBC, the news agency Reuters and the Financial Times operate from the UK. In 2015, the media industry in the United Kingdom employed nearly 90,000 people.(79)

The **press** can look back on a long tradition and forms the basis for the variety of the media landscape. With a strong national press as its backbone, it consists of a whole range of daily and Sunday newspapers, even if their circulation figures have been eroding for years. In contrast, digital platforms are gaining ground. Press concentration is at an advanced stage, in particular in the local and regional newspaper sector: the five largest media corporations control nearly three quarters of the regional newspaper market. In the national press sector, two corporations (News International, Daily Mail and General Trust) occupy more than half the market.(80) The titles with the highest circulation figures are the well-known tabloids, with The Sun and the Daily Mail reaching print runs of over 1.5 million in 2016. The Metro free sheet distributes nearly as many copies as well. The quality paper with the highest circulation, at 450,000 copies, is the establishment newspaper The Times, owned by Rupert Murdoch's originally Australian News Corporation.(81)

There are various TV groups in the United Kingdom's **TV market**, most of which operate at international level too. The public service broadcaster the BBC enjoys a prominent position, not only as the provider of various national and regional TV programmes, but also with a commercial arm, in the shape of BBC Worldwide. This portfolio encompasses TV content as well as individual stations that can be received outside Great Britain. There are other stations with a public service remit, such as Channel 4 and the Welsh S4C. Taken together, the public broadcasters control a market share of about 46%. Amongst the private providers, ITV, owned by a stock-market listed, licensed public limited company (ITV plc), can boast the largest share

of the user market, with 35%.(82) Other major private providers include the US-American media corporation Viacom, owners of Channel 5, as well as UKTV, Turner and Discovery. Another heavyweight is the Pay-TV company Sky, who hold important football rights.

The United Kingdom's **radio landscape** also displays great variety. The BBC alone runs ten national stations, as well as a large number of regional and local stations. The public service broadcaster thereby attains a market share of 54%.(83) Some 300 private, mostly local radio stations complete the picture. The two major radio networks are Bauer Media, with a 2016 market share of around 15% since buying the Orion Group, as well as the London-based Global, owner of the private market leader Classic FM amongst others. Communicorp has a presence in Ireland with several radio stations, plus stations in Scotland, Wales and Manchester. The mid-size radio groups include the Wireless Group, a part of News Corporation and operating mostly in Northern Ireland. There are innumerable smaller radio broadcasters, operating mostly at a regional level and achieving a joint market share of around 7%.(84)

The United Kingdom **regulator**, the Office of Communications (Ofcom), is generally responsible for telecommunications, radio and TV, with the exception, until recently, of the BBC. In April 2017 this task was also transferred to Ofcom from the previous regulatory authority, the BBC Trust. Ofcom is an independent authority that does not form part of the British government. Its statutory basis is the Communications Act 2003. Ofcom's brief includes ensuring programmes of high quality and variety, as well as guaranteeing sufficient competition in the media and telecommunications sector. By law, Ofcom is required to carry out audience research with regard to programme remits. Advertising media research does not form part of the brief and regulatory area. For its work, Ofcom can draw on the data provided by currency research organisations.

Due to digitalisation and structural change, the United Kingdom's **currency research organisations** are faced with great challenges, which, according to industry experts, can only be solved in a common effort. Because of the complexity of the media market, the **print media** have two currency research organisations, both organised in the form of JICs: while PAMCo gathers the audience figures for the national print media, JICREG is the currency authority for local media.

PAMCo (Publishers Audience Measurement Company) was established in January 2016 as the successor organisation to the National Readership Survey (NRS), founded in 1956. Participating members are the advertising industry associations, the Institute of Practitioners in Advertising (IPA), the News Media Association (NMA) and the PPA (Professional Publishers Association), the organisation grouping together magazine publishers and database providers. The study identifies the readership figures of over 250 media brands. In 2012, data merging was used to extend the study to online readerships, and in 2014 to include mobile users. Work is underway on the next development step: late 2017/early 2018 should see the launch of the new Audience Measurement for Publishers (AMP) analysis, integrating all categories. Methodologically, the intention is to use a face-to-face survey, including for determining the use of digital channels. The execution of the PAMCo studies has

been outsourced to the institutes Ipsos MORI, RSMB and comScore, with Ipsos MORI responsible for marketing the data. PAMCo employs ten staff, but does not release information on business volume.

The second print media currency organisation, **JICREG**, has been identifying the usage data of the regional print media since 1990. JICREG is a public limited company (plc), owned by the national associations NMA, PPA and IPA. Since 2013 there has been a close collaborative partnership with PAMCo, consisting of the JICREG brands data being collected as part of the national PAMCo Survey. This means that it is de facto the same survey. In January 2016, the collaboration of the two print media JICs was extended by a further five years.

The British currency organisation for the **TV sector** is the Broadcasters' Audience Research Board (**BARB**). In existence since 1981, the BARB is a public limited company (plc) and is owned by the BBC, ITV, Channel 4, Channel 5, Sky, UKTV (since 2017) and the advertising association IPA. Before 1981, TV research in the United Kingdom was fragmented, with the BBC and ITV each running their own research systems. BARB employs ten staff, mainly tasked with coordination, communications and marketing. The majority of operational activities are outsourced; Kantar Media is responsible for the technical equipment and data transmission, Ipsos MORI recruits the panelists and determines the household-related data, and RSMB designs the study and carries out the quality control. Currently, the most important future plan being developed at BARB is Project Dovetail, addressing the fragmentation of TV use on various platforms. The target is to identify a total reach of video content across all user channels. Already implemented are the 'Player Reports'(85), which serve as a model for other countries (e.g. Ireland). In principle it would also be possible to include services such as Netflix in the measurement; however, a lack of cooperation on the part of those providers means this is not yet viable. The BARB panel is funded through contributions of the participants and marketing of the data, organised in part through resellers offering further analysis services.

The **radio category** is studied by Radio Joint Audience Research (RAJAR). Founded in 1992, the company is owned by the BBC and RadioCentre, the association bringing together private radio stations. While the advertising associations IPA and ISBA (Incorporated Society of British Advertisers) do not belong to the circle of owners, they enjoy a consultancy role during board meetings, which is why RAJAR identifies itself as a JIC. The RAJAR Survey has been outsourced to the Ipsos MORI institute and is conducted using the diary method in a household panel. Responsibility for the random sample concept and data weighting lies with RSMB. In the wake of a thorough evaluation a few years ago, RAJAR dispensed with deploying a technical measurement method, considering it to be too costly, too prone to error and not adequate for the complex regional structures of the radio markets. RAJAR funds itself through participation fees paid by the radio stations, and through selling the data.

As a hybrid model, the currency organisation for the **internet** category represents a special case. United Kingdom Online Measurement (UKOM) is a company that has outsourced the entire currency research to a commercial partner (comScore), which

also owns the data. The reason given is financial considerations. UKOM's main task is developing and monitoring the measurement standards. The organisation also commissions research and monitors data quality. UKOM funds itself through a 12.5% levy on the comScore products authorised by UKOM. The prices media companies pay for accessing the data are dependent on reach, and for agencies on the type and volume of data accessed. While UKOM authorises the guiding principles, the final pricing structure lies within the remit of comScore.

The organisation JICWEBS, grouping together various associations and organisations representing online providers and advertisers is striving towards common standards in measuring the performance and marketing of online advertising products. The JICWEBS does not conduct currency research but was created mainly to make the communications performance of online advertising more transparent and to minimise advertising fraud.

The British advertising association IPA has been conducting the IPA Touchpoints study since 2006. This is a convergent consumer study primarily concerned with the effect of individual communications media in the purchasing process. IPA Touchpoints is not currency research in the strictest sense but first and foremost an advertising planning tool, which is however being met with quite a high degree of interest in the market, and has since also been adapted in other countries.

Despite the variety of currency research organisations, there are numerous and efficient collaborations in the United Kingdom, partly for historical reasons, one being the fact that the sponsoring organisations are mainly the same. The sector players recognise the efforts of the currency research organisations, even if there is some occasional criticism, such as that of the role played by the RSMB. One of the responsibilities of this organisation is the quality control of the TV panel, where Kantar plays a major role. As half of RSMB belongs to Kantar (with the other half owned by the Havas advertising agency), its independence is sometimes called into question. The comparatively conflict-free field of the United Kingdom's currency research organisations might possibly also be due to the neutral position of the BBC, which is not allowed to broadcast advertising in its programmes. This means the BBC is not a direct rival in the advertising market, lowering the potential for conflict.

The central issues for the future orientation of currency research in the United Kingdom are media convergence and increasing online advertising fraud.

3.2.7. Ireland

With its 4.8 million inhabitants, Ireland is the smallest European country in our selection. Ireland has two official languages, English and Irish. However, with Irish spoken only by a small minority, the dominant English language makes it easy for media products and services from the United Kingdom and the United States to get a foothold in the Irish market. In their bids to enter the Irish market, media from the UK also benefit from their cultural and geographical proximity. Hence, the Irish media are faced with comparatively strong foreign rivals.

The Irish **TV market** features two Irish public broadcasters, RTÉ and TG4. Broadcasting English-language programmes, RTÉ is funded by licence fees and advertising revenue. In January 2017 RTÉ achieved a market share of 26.6%. By contrast, in the same month, the market share of the Irish-language broadcaster TG4 stood at 1.5%.⁽⁸⁶⁾ As is the case in Switzerland, public TV in Ireland enjoys a far larger audience share than the domestic private TV. The largest private network is the TV3 Group, owned by Virgin Media Ireland and thus by the UPC mother company Liberty Global. In January, the group's market share (TV3, TV3+1, 3e, be3) stood at 16.1%.⁽⁸⁷⁾ The new domestic private stations, UTV Ireland and Irish TV, introduced in 2014 and 2015, did not meet with the expected public success. UTV Ireland now belongs, alongside be3, to the TV3 Group, while Irish TV had to be sold to the Irish Post newspaper.⁽⁸⁸⁾ Around a third of the viewing market is taken by foreign, mainly British (and at the same time Northern Irish) stations. These do provide their audience with some Irish content and commercial slots.

The **radio landscape** is dominated by the public RTÉ radio stable. The strongest private competitor is the media firm Communicorp, which owns six radio stations, of which two have national reach (Today FM and Newstalk). There are a few local radio stations too.⁽⁸⁹⁾

In terms of popularity the Irish are less keen on **newspapers** as a source of news, instead favouring TV, radio and online.⁽⁹⁰⁾ Still, for decades Ireland has supported an extremely strong and competitive **print media market**, which is, like the broadcast market, heavily influenced by British competition. Various British newspapers, amongst them the Sunday Times, are published with a special Irish section. While readership figures have fallen in recent years, Ireland does not show such a sharp continuous downward trend as is seen in many other Western countries. Over the past few years, one of the biggest daily newspapers, the Irish Times, has even enjoyed an increase more than once in the users of their print edition and a two-digit increase in users of their website.⁽⁹¹⁾ Particularly popular with readers are the national daily and Sunday newspapers, as well as regional weeklies. In 2014/5, the most popular Sunday paper, the Sunday Independent, had a readership of about 921,000, i.e. more than a fifth of the Irish population.⁽⁹²⁾ The biggest daily newspaper, with around 688,000 readers, is the Irish Independent, which belongs to the Independent News & Media (INM) company. INM is the biggest player in the national newspaper and online market. Alongside the Irish Independent, INM also owns the national daily newspaper The Herald, several Sunday and local papers and part of the Irish Daily Star. In 2014, the circulation of the daily newspapers belonging to INM made up around 45% of the entire national circulation.⁽⁹³⁾

The year 2010 saw the launch of a very popular news website: TheJournal.ie is comparable to the Huffington Post or the Swiss site watson and in 2013 claimed to reach 20% of the population.⁽⁹⁴⁾ Owner Distilled SCH, a subsidiary of Distilled Media and the Norwegian Schibsted Media Group, has been active with various sites in the online real estate and small ads business since 1997.⁽⁹⁵⁾ In terms of journalistic content as well as real estate and small ads, TheJournal.ie represents strong competition for the local print media, which are increasingly jockeying for online position.

The Irish press sector self-regulates through the Press Council of Ireland and the Press Ombudsman. In the broadcasting sector, the Broadcasting Authority of Ireland (BAI) is responsible for **regulation**. The BAI is an independent organisation, which does not form part of the Irish administration and displays a few particular characteristics. Firstly, it is funded by the media themselves, through a levy. Secondly, one of its aims is to promote understanding of the media amongst the population and media professionals. Thirdly, the BAI occupies an unusual role in the radio currency organisation: a representative of BAI sits on the management committee of the Joint National Listenership Research (JNLR). As a member of the management committee, BAI is in charge of the co-supervision of central changes in the listener study, such as the awarding of contracts or methodological changes.(96) In the TV currency organisation, however, BAI is not involved nor does it take on a supervisory function.

Since the 1960s, the public broadcaster RTÉ has taken the lead on TV currency organisation. As around half its budget comes from advertising revenue, RTÉ has been and remains very interested in viewer figures. Later, TV3 and TG4 came on board the RTÉ research. Eventually, 2007 saw the founding of **TAM Ireland**, which has since then commissioned and supervised the TV study. TAM Ireland has similarities with the British BARB and is led by a Board of Directors. The board consists of a representative of the advertising industry, two representatives of the public RTÉ and one each from other TV networks that take out advertising in the Irish market (such as the British Channel 4).(97) One of TAM Ireland's task groups is the Future Measurement Development Group. Founded in 2012, this group looks at current and future methodological developments within the sector. Its current target is to measure viewer behaviour across all devices, both inside and outside the home, as reliably as possible, and to integrate the results in a Total Audience TV currency. One step in that direction is the VISTA (Video Integration Strategy for a Total Audience) project, which started in the autumn of 2016 and is still awaiting complete realisation.(98)

Ireland ranks amongst the countries with a strong interest in the latest developments in viewer research. In 2010 for example it was one of the first countries to record time-delayed TV use. Since 1996, execution of the study has been in the hands of the Nielsen firm, which obtains the data by Peoplemeter.

Since 1989, information on **radio use** has been collected by the aforementioned JNLR. The management committee consists of members from RTÉ, private radio stations, the regulator BAI and the two associations representing the advertising agencies (IAPI) and advertisers (AAI). However, the study is exclusively funded by the radio stations. The idea has been advanced of changing the JIC from a straightforward company into a legal body. This would have the advantage of allowing the JIC to enter into contracts with the data provider as an independent legal entity. Since 1989, the study has been awarded to Ipsos MRBI, which collects information on radio use via a face-to-face survey.(99) Currently there is an increasing demand from JNLR and its clients for a Total Audio Study, which would also include the use of podcasts and services such as Spotify.

Newspaper use is analysed by the Joint National Readership Survey (JNRS). The JNRS is made up of members of the NewsBrands Ireland newspaper association, the AAI advertising association and the IAPI association of agencies. Since 2013 the study has also contained data on digital readership. Before the study was awarded anew in 2016, JNRS asked for feedback from the advertising industry in order to improve the study and adapt it to the challenges of current times. Eventually, Kantar Millward Brown was once again awarded the contract for gathering the data. First results are expected in late 2017.

The Irish online JIC, or Joint National Internet Research Committee, was dissolved by its members some ten years ago, marking the end of an independent Irish currency organisation for **internet use**. The de facto currency research on the Irish market is compiled by the international comScore company. Here, comScore benefits from the fact that its comScore MMX-MP product has already established itself as standard currency on the neighbouring British market. Also, in 2016, the company was integrated into the Irish readership currency by Millward Brown as a partner charged with measuring the digital use of print brands. It is comScore's goal to use this collaboration with the print sector to establish a stable customer base, which could – with IAB's support – be the launching pad over time for a standalone online JIC. What is available at the moment, as in many other countries, is a comScore user committee, where clients can voice their ideas regarding measurement.

The established Irish currency organisations maintain no connections or collaborations. Discussions about a **convergence study** within the organisations have yet to yield a result. Having recommended such a cross-media measurement for the past three years, the Institute of Advertising Practitioners in Ireland (IAPI) is welcoming the first Irish step in this direction, undertaken by JNRS with its combined measurement of print and digital readership. A perceived problem here is the costly financing of the measuring methods. In a small market such as Ireland in particular, the individual participants would be looking at high costs. However, in the opinion of the IAPI and other agents of the advertising industry, even in the case of Ireland to join all currencies into a single standard currency would be financially reasonable and advisable. There is, however, no consensus about who should shoulder the costs for this project.(100)

3.3. North/South America

3.3.1. USA

With 322.8 million inhabitants, the USA represents the most populous country in our selection.

The US-American **media market** is split into local markets, whose number and size differ depending on media category.(101) TV adds a national level to the local market level that is largely missing in the radio sector. The radio market is dominated by commercial companies, with the public providers leading more of a niche existence. The public TV station PBS belongs to the Corporation for Public Broadcasting (CPB). Founded by Congress, this non-profit organisation is funded by the US government and donations, and also supports a good number of local independent radio and TV stations. Equally forming part of CPB, NPR (National Public Radio) is a cooperation of non-profit radio stations. NPR funds itself largely through sponsorship by companies and foundations. The commercial providers are flanked by numerous non-profit radio and TV stations, mostly financed by donations or sponsorship and exempt from the fees levied for frequency use.

US-American **TV** is essentially dominated by the big four networks. In 2016, the network with the highest viewing figures was CBS (owned by National Amusements) with 8.81 million viewers, followed by NBC (Comcast) with 8.43 million viewers.(102) ABC (Disney) and Fox (21st Century Fox) reached 6.33 million and 5.05 million respectively. Some distance behind follow the Fox News Channel, the Spanish-language network Univision, the sports network ESPN and The CW network. The increasing success of video-on-demand platforms, such as Netflix or Amazon Prime, are putting pressure on the existing linear (Pay-)TV networks.

As of late 2016, the USA had 15,516 licensed **radio stations** registered, although how many of them actually broadcast is largely unknown.(103) Amongst the biggest groups are iHeartMedia (previously known as ClearChannel), Cumulus Media, Entercom, Salem Media Group, CBS Radio and the predominantly Spanish-speaking Entravision. There is also the larger non-profit radio network Educational Media Foundation, with a religious background. The private Entercom group is currently engaged in taking over the CBS radio stations.

The US-American **print landscape**, which is also divided up into local markets, is characterised by numerous smaller and larger local newspapers. The Wall Street Journal, the New York Times, USA Today and the Washington Post are the most popular newspapers and address a national readership. Some newspapers belong – like most US newspapers – to large media conglomerates. The Wall Street Journal is owned by Rupert Murdoch's News Corp, while USA Today forms part of the Gannett media corporation, which owns one or more newspapers in most states.

The Federal Communications Commission (FCC) is the **US regulator** for radio, TV and telecommunications, and is an independent federal agency overseen by Congress. From the start, **currency research** has been in private hands,(104) hence the important role played by the Federal Trade Commission (FTC) in mergers and takeovers. An independent federal agency like the FCC, it promotes competition,

aims to protect consumers and in this vein prevent a monopolistic currency organisation for one or several media categories. For anti-trust reasons, US legislation prohibits the JIC form of organisation for all sectors.

The early days of **audience research** were not easy. In the 1950s there were several providers, sometimes coming up with contradictory results. The National Association of Broadcasters (NAB) and the Advertising Research Foundation (ARF) made suggestions for improvements, only to be ignored by the providers. Complaints registered with members of Congress initially met with no success, but eventually the FTC was forced by a quiz show scandal to examine the collected data, noting several mistakes and arbitrary data manipulations. Years of discussion culminated in the 1966 Harris Committee Report, leading to an admission of guilt on the part of the currency companies. Another consequence was the foundation of the **Media Rating Council** (MRC) at the request of the US Congress.(105) The industry preferred this self-regulating body to a state-run entity. Nearly all industry organisations and firms may join the MRC, excluding only companies that are themselves active in currency research. The MRC ensures a voluntary certification of the currency research according to the tenets of validity, reliability and effectiveness. There is a continuous auditing process.(106)

Nielsen is the dominant company in US **currency research**. The first Nielsen currency surveys for US radio were issued as early as 1947 and for TV in 1950. Founded in the 1920s by Arthur C. Nielsen, the firm and its measurement methods became an international pioneer of currency research. Today though, some of Nielsen's TV measurement methods are considered out of date. In most small US-American TV markets Nielsen is still gathering data on TV use by means of paper diaries. As a method not certified by the MRC, it is the target of criticism: in viewer research, electronic measurement, mentioned as early as 1999 in the Global Guidelines on TV audience measurement (GGTAM), has for a long time now been standard practice. However, the USA still maintains the diary. The explanations given revolve around cultural factors and protection of privacy, in an attempt to not appear too pushy. In 56 (of the 210 defined) US-American markets TV use is measured through a box connected to the TV set. Since early 2017, outside-the-home consumption has also been analysed in 25 of these markets, using additional Personal PeopleMeters. The USA are the first country where Nielsen is measuring delayed video use up to 35 days after broadcast – as opposed to the international standard, which is over the following seven days. Data on the total consumption of a programme is collected in the Total Audience currency, which alongside time delay is able to capture the consumption of programmes on additional devices, such as smartphones, tablets and desk-top computers.

March 2017 saw the debut publication of data from Nielsen's Total Audience measurement – under the name of **Total Content Ratings** (TCR). Even before publication TCR was heavily criticised as not yet sufficiently developed for use. The supposed gaps in the data were criticised, as well as the high costs of the measurement and the long period of time Nielsen requires to provide clients with the results. Another criticism is that the measurement tool is not yet perfected, and that the company merely breaks down its data into the classic categories of 'gender',

'age', etc., instead of taking consumer information into account too.(107)

Similar criticism of Nielsen has frequently been voiced over past years. Another target is the company's leading market position: **comScore**, the company originally specialising in online usage measurement, acquired the video measurement firm Rentrak in 2015. Since then it is comScore that collects data on TV and online use in the USA and is attempting to become the dominant industry currency organisation. In collaboration with CIMM, the Coalition for Innovative Media Measurement, the company has since 2010 been developing its own Total Audience Measurement. 2015 saw the presentation of the product: Xmedia, which measures the use of linear and digital TV as well as online use across all devices. However, in 2016 comScore had to contend with a severe setback: the company was investigated for bookkeeping discrepancies, and its share price nosedived. For 2017 comScore is planning several innovations, including an 'ExtendedTV' measurement tool able to capture cross-platform TV usage better than before.(108)

At the moment, many US-American TV providers are not entirely satisfied either with comScore's or Nielsen's products. This is the reason behind three major TV networks, Fox Networks Group, Viacom and Turner, coming together to develop an 'open platform' for independent usage measurement. Its OpenAP platform is scheduled to come onto the market in April 2017.(109)

Radio use is measured by Nielsen Audio in the 48 largest local markets using Personal PeopleMeters. In more than 225 other markets user data is gathered through diaries. Data may also be enhanced with qualitative information on the panel's consumer behaviour. Nielsen Audio emerged from the takeover in 2012 of the Arbitron company, which had previously provided listener figures. A condition imposed by the FTC on the takeover was that the data for the following eight years had to be made available to third parties on a licence basis.(110) This means that the numerous non-profit radio stations can obtain the data not only directly from Nielsen, but also from the Radio Research Consortium. Competition for Nielsen comes from Triton and Kantar.(111)

The survey of **print figures** in the USA started in the 1930s. Life magazine wanted to check its suspicion that it had a lot more readers than their circulation figures would suggest, and that its value for advertisers was accordingly higher. This first study marked the start of a measurement method or philosophy that appears unusual viewed from today's European perspective. The interviewers used the 'Thru-The-Book' (TTB) method, which means the survey looked through newspapers and magazines page by page. This intensive survey, alongside the fact that the USA does not represent a classic newspaper country, help to explain why in the USA print use research – in particular compared to TV use research – has traditionally been neglected. It was only in 1979 that one provider, Mediamark Research & Intelligence (MRI), managed to established itself, using the European 'Recent Reading' method. These days, MRI belongs to the German GfK, and GfK MRI's Survey of the American Consumer represents the US-American print currency. The survey is based on around 26,000 face-to-face interviews, which also gather information on media and consumer behaviour, attitudes and demographics. GfK MRI is greatly interested in enhancing its print data with other studies, in order to make it more attractive to the advertising market. In Net/MRI for instance, data from the Survey of the American Consumer are merged with Nielsen's National People Meter (NPM) data. GfK MRI also entered into a partnership with the

Datalogix company.

A second print use study being used in the American market is by Scarborough, a company now belonging to Nielsen. Scarborough also integrates its print data into a consumer study that asks about the use of other media categories. While the measurement method differs from market to market, it is usually based on a survey.

Competition is particularly acute in **internet use research**. The most important data for the sector are provided by the comScore company. In the USA, as in some European countries, comScore is using its MMX-MP product, with the abbreviation standing for Media Metrix – Multi Platform. One of the other providers of online indicators is Nielsen, which uses parts of its TV panels as an online panel. The company has also been enhancing its data since 2010 through Facebook data. An innovation of the US-American usage measurement market is Nielsen's Twitter TV Ratings. In these ratings Nielsen measures the Total Twitter Activity, i.e. how often users were Tweeting about TV content three hours before and after the broadcast of a programme. To date, outside the USA Nielsen is only using this method in Italy. Measurement services by Google and Facebook are currently eyed with increasing caution: Facebook had to admit to inflated video reach figures and Google has temporarily had its certification revoked.(112)

3.3.2. Canada

In terms of land area, Canada is larger than its neighbour, the USA, but with a population of only 36.3 million the country has far fewer inhabitants. Official languages are English and French. Bilingualism and the strong influence of the US media are central characteristics of the Canadian media system.

The newspaper market is dominated by the two large national titles, The Globe and Mail and the National Post, while in Quebec there is also Le Devoir. Economic concentration is quite high in the Canadian newspaper market, with most newspapers part of major chains, such as Quebecor or Can-West News Service. In Canada too, the **print media** are suffering from structural changes, which led to newspapers in Quebec asking the state for help in 2016.(113)

The Canadian **broadcasting system** is the oldest dual broadcasting system in the world. The public service broadcaster, the Canadian Broadcasting Corporation (CBC), has been transmitting programmes in French and English across the country since 1952. The commercial network sector shows a high degree of concentration. Key players in the private TV market are Bell, Rogers, Shaw and Quebecor. Alongside the private TV providers are a relatively high number of community stations transmitting for universities or religious institutions. The TV networks transmitted in from the USA are extremely popular with Canadians, often reaching higher viewing rates than their domestic counterparts. The domestic broadcasters are supported by the Canadian state in their competition with US networks. For instance, 1972 saw the introduction of simultaneous substitution (Simsub). Simsub means that the transmission of a US station can be interrupted and its broadcasting slot used for programmes or advertising by a Canadian provider, substituting the US content or advertising. Simsub was lifted for the first time for the Superbowl 2016 (comparable to the World Cup Final in football). The reason given was that the advertising (produced especially for the Superbowl by most companies) was an integral part of the event. This decision was met with disappointment by the networks, being the first time that such a decision had gone against them.

There are four publicly funded **radio stations**, two each in English (Radio One and Radio Two) and French (La Radio of Radio Canada and La Chaîne culturelle FM). While all in all some 2,000 stations broadcast in Canada on the AM and FM frequencies, the market is mainly dominated by four of the overall 21 players: Newcap Broadcasting (95 stations), Rogers Communications (52 stations), Corus Entertainment (39 stations) and Bell Media (106 stations). And in 2015 just five companies creamed off nearly 90% of advertising turnover (BCE, Cogeco, Quebecor, Rogers and Shaw).(114)

Preserving the country's multicultural identity is very important in Canada, which explains the high number of ethnically segmented radio stations or programme formats. Ethnic radio is by no means an unprofitable niche that has to be promoted out of a state integration drive, but rather a potent and innovative segment.

For Canadian radio networks, frequency bands play an important role: in this lightly populated country AM frequencies are unstable, particularly across long distances, which is why by now the entire AM bandwidth is vacant. In order to keep the option of transmitting on the AM frequency, FM stations are requested to broadcast their signal not by air but through a cable. Another technical development is taking place in the DAB market: currently 73 stations can be received – but they are all duplicates of already existing stations. No provider is prepared yet to rely solely on the DAB technology.

The Canadian Radio-Television and Telecommunications Commission (CRTC) **regulatory body** is an independent agency with no affiliation to a ministry. The CRTC has a relatively high degree of executive powers and mandates at its disposal and is a strong player in the landscape of Canadian broadcasting. Its responsibilities include the authorisation of Simsub, as well as the shaping by decree of the Broadcasting Act of Canada. The regulatory measures aim to ensure the population's access to Canadian content and thus to safeguard and promote the Canadian national identity. One of the best-known measures taken by the CRTC is the so-called CanCon-Quote. This determined that both public and private TV and radio have to broadcast a certain quota of programmes of Canadian content or origin. Over the past few years, however, the CanCon-Quote has increasingly come under fire, with discussions centred around the issue of whether it still makes sense in the digital age, and if it runs counter to the trans-Pacific trade agreement TPP planned at the time. In 2008 the CRTC issued new rules aiming to limit cross-ownership in both the broadcast and press sectors. Other than that the press is not subject to state regulation. The Canadian provinces have press councils as a tool for self-regulation of the press.

While in 1999 the CRTC voiced the opinion that there was no need to regulate the internet, this is now being discussed.

An unusual feature in international comparison is that the CRTC also **supervises the currency research** in the broadcast sector. As is the case in Switzerland, in Canada the regulator lays down the aims of the survey and chooses the organisation responsible for its operation in a public tender. In the autumn of 2016, the previous contractor, Numeris, was confirmed for another three years.

The **TV and radio currency organisation** Numeris was founded as far back as 1944 by the Canadian Association of Broadcasters (CAB, radio and TV) and the Association of Canadian Advertisers (ACA), and now boasts 1,250 members from the media and advertising sector. As the JIC is conducting the audience research themselves it is considered a TRCC. Numeris collects the data across the media, i.e. for TV and radio together – an international rarity. Two different methods are employed here: in the national consumer market and in the six largest regional markets Numeris – in collaboration with Nielsen – gives preference to the Personal

Peoplemeter. In the remaining markets Numeris still relies on the traditional paper diaries, in part at least using online diaries. The company in charge of the data processing is Kantar.

Canada is still a long way away from cross-platform measurement in the area of TV. This would require 'goodwill, unusual partnerships, patience and time.'(115) Numeris is at least already collaborating with an STB (set-top box) working group commissioned by the CRTC, to find out whether it would be technically feasible to bring together their own data and STB data provided by the telecommunications companies. Numeris is also looking for new ways of measuring digital TV. (116) Since the autumn of 2016 panel members can choose to make their diary entries online too. As a consequence of this change far more participants from the 25-54 age group submitted their diary entries, and in parts the new measurement results differed quite significantly from the old ones, with small stations showing changes of up to 30%. This created a degree of unhappiness on the part of media and advertising clients and led to discussions about the adequacy of measuring methods. External experts expect further reworking of the measuring methodology for 2017.

Since 2014, the **newspaper currency survey** has been conducted by Vividata, a TRCC. Vividata was the result of a merger of the currency organisation for newspaper usage NADbank and the Print Measurement Bureau (PMB), dedicated to studying magazine usage. Market players had been advocating this merger for years.(117) Alongside reduced costs for data collection, Vividata offers users the additional advantages of collecting information of more relevance to the advertising sector and surveying a more representative sample. Furthermore, Vividata also provides internet use data for the print media, although this is not measured but gathered – as is print use – as part of a survey.

In Canada – as is the case in the USA – there is no **internet currency** organisation with roots in the industry. Instead the advertising and media market relies on data provided by several private companies, comScore in particular.

So far no proper convergence study has been conducted for Canada. In 2016 Ipsos launched the British TouchPoints study, a convergent consumer study, on the Canadian market.(118)

3.3.3. Brazil

With more than 200 million inhabitants, Brazil is the world's sixth-largest media market.(119) Up until around 2013 the country experienced strong economic growth, but has since then entered a sustained period of recession. Alongside the country's official language of Portuguese a number of minority languages exist, spoken by relatively small sections of the population.

Due to its size, the Brazilian **media market** is heavily regionalised and characterised by a strong, predominantly privately run broadcasting system with thousands of radio stations and a few hundred TV channels. The **TV industry** is also an important sector for Brazilian exports. The important role played by broadcasting has been ascribed, amongst other reasons, to the country's relatively low literacy rate of around 85% (as of 2002).(120) Another reason is conjectured to be the fact that Brazil's status as a colony well into the 19th century did not allow for the establishment of an (independent) press sector. The censorship in place up until the 1980s was a further factor undermining the importance of press reporting.(121) In any case, around the year 2010 the dominant medium was television, used by the Brazilians for an average of 3.5 hours per day.(122)

Despite the dominance enjoyed by radio and TV, Brazil does have more than 500 **daily**

newspapers. In 2015, the largest, such as O Globo, Folha de São Paulo or Super Notícia, reached print runs of around 300,000 copies.(123) However, digitalisation is gaining ground in Brazil too. The long-established Jornal do Brasil for instance, founded in 1891, has since 2010 been published in digital form only, and the website www.onlinenewspapers.com lists 166 digital newspapers.(124) One characteristic of online usage in Brazil is that the upgrading is taking place in the mobile sector: costs for internet accessed via smartphone are lower and variable, while having a landline at home is relatively expensive. User figures for home internet and internet accessed by cyber café are practically the same (27% versus 31%).(125)

While the **broadcasting system** in principal has a dual structure, it is de facto dominated by private companies. The state-owned provider **EBC** (Empresa Brasil de Comunicação S/A), which emerged in 2007 from the previous Radiobras, runs the national news agency alongside two TV programmes (TV Brasil, TV Brasil Internacional) and eight radio stations. However, these services play a limited role in the market.

The market leader in the **TV sector** is Rede Globo, one of the world's biggest media companies, with interests across the entire range of media. Its 'telenovelas' make Globo one of the world's most important exporters of TV programmes.(126) In 2015, Globo enjoyed a market share of 37% in the Brazilian TV market, although this has been decreasing. Other large broadcasters are the Sistema Brasileiro de Televisão (SBT), part of the Grupo Silvio Santos, TV Record (Grupo Record) and TV Band (Grupo Bandeirantes). The four largest providers occupy about two thirds of the market. Over recent years however a good number of small providers have appeared on the scene, and are gaining market share.(127)

The **radio market** is in the main dominated by the same media corporations, with the exception of the largest radio company, the Gaucha group (Grupo RBS), grouping together 143 radio stations.(128) While there are also countless small local and communal radio stations, it is nearly impossible to obtain reliable data on their number. A UNESCO statistic from 2005 counted a total of 3,890 radio stations,(129) while an up-to-date source states a higher figure of 4,909.(130) There are no publicly reliable data on the market share of individual radio companies or programmes.

With Brazil's media market largely liberalised, **regulation** has until now been weak and late to arrive: the Código Brasileiro de Telecomunicações (CBT) was implemented in 1962 and given concrete form in 1997 by the Lei Geral de Telecomunicações. The Agência Nacional de Telecomunicações (ANATEL) is responsible for telecommunications. Broadcasting licences are issued directly by Parliament on application by the communications ministry. Despite the fact that licences have only regional validity and are limited in their number per provider, in reality powerful national chains have emerged, with regional satellites. The Conselho Nacional de Telecomunicações is in place as the regulatory body in charge of penalising violation of the rules.

Regulation of Brazil's media sector is not very pronounced: 'There is no specific board or council working exclusively to promote and carry out media self-regulation. On the other hand, Brazil has a complex system of laws and institutions that in some way undertakes the role of regulating the media'.(131) Until a few years ago there were no limitations on the content of media production, only self-regulation in the advertising sector.(132) Since then, however, legislation regarding child protection has been introduced. The past few years have seen the start of intense discussions about setting up an independent regulatory authority, in view of the planned complete digitalisation of broadcasting, as the negative consequences of unfettered competition are becoming ever more obvious. Resistance to enforced regulation is strong, however, which comes as no surprise given the fact that a large proportion of

parliamentary deputies have connections with media corporations.(133)

The Brazilian Institute of Public Opinion and Statistics (**IBOPE**) started as early as 1942 by surveying the Brazilian **radio reach**, adding **TV reach** in 1951. The Institute's founder Auricélio Penteadó, himself owner of a radio station, took inspiration from the US-American Gallup Institute. In 1988, IBOPE was the world's first institute to introduce **real-time measurement** of TV use. In 2014 the media department – in charge of measuring use – of the well-established institute was taken over by Kantar Media and refashioned into today's Kantar Ibope Media.(134) The institute offers both national and regional panels. The national panel, operating with an electronic measurement system, comprises Brazil's 15 biggest urban areas. Clients can choose between monthly, weekly, daily or real-time data.

Over the past decades, (Kantar) Ibope has time and again found itself the target of criticism, mainly because of flawed or delayed data. This has resulted in repeated attempts to attack (Kantar) Ibope's monopoly with new services, attempts that until 2013 proved fruitless.(135) In 2013 the GfK was commissioned by the media companies Band TV, Record, RedeTV! and SBT to measure TV reach in competition with Kantar Ibope. The GfK figures have been available on the Brazilian market since October 2015, and some market players now have contracts with both firms (despite the additional costs).(136) GfK had the aim of increasing the representativeness of the TV reach data. With this in mind, they put together a panel that also integrates the population living in the slums, enabling the extreme socio-economic variance within the Brazilian population to be taken into account.(137) The GfK panel, which records use by means of the Peplemeter, currently comprises 6,500 households in the country's 15 major urban areas. GfK also works with Nielsen in order to implement a cross-media TV/online usage measurement.

It seems that competition from the GfK has set in motion some rethinking at Kantar Ibope and resulted in the quality of their data improving. Not only are there fewer mistakes, Kantar Ibope is also conducting more interviews and has introduced some innovations, including integrating pay TV into the measurement and sampling time-delayed use.(138) These improvements in quality on the part of Kantar Ibope led to its readings from autumn 2016 onwards aligning with GfK's data. Before that, discrepancies in viewer figures between the two companies had sometimes reached up to 50%.(139) The speed of Kantar Ibope's delivery is now also meeting advertising clients' requirements, leading to current discussions as to whether there is still a need for the GfK. The largest Brazilian TV network Rede Globo, for instance, is now satisfied with Kantar Ipsos and is not going through with its planned move to GfK.(140) In addition, GfK was not able to fulfil every expectation of its customers, for instance in terms of speed of data delivery.(141) This has led to the GfK project in Brazil having a bumpy ride so far, especially with one of the participating TV stations pulling out in early 2017.(142)

The Brazilian **Print Use Survey** is conducted by Ipsos, a company founded in France but operating internationally. In 2001, Ipsos took over the long-standing Brazilian Marplan company, which had up to that point been in charge of print currency. The Estudo Geral de Meios, or EGM for short, samples the print media use – alongside consumer and general media use habits – of some 30,000 Brazilians by means of face-to-face interviews. In 2015 the newspaper association Associação Nacional de Jornais (ANJ) launched a new reach survey, the Métrica Única de Audiência dos Jornais(143), combining the reach data from the EGM study, the circulation figures of the Instituto Verificador de Circulação (IVC) and the online usage data provided by comScore. The concept underlying this data merger was put together by the newspaper publishers' association ANJ together with Ipsos and other partners. However, just one year after the introduction of the new combined currency the project was shut down. Its failure was due to three reasons. Firstly, the publishers did not

manage to agree on methodological foundations recognised by all. Secondly, many participants balked at the costs of the new project, and thirdly, problems emerged in the collaboration between two central project partners, Ipsos and comScore, as comScore at international level collaborates closely with one of Ipsos' main rivals, Kantar. Thus, 2015 saw a return to the original solution. Today, the Ipsos EGM study is once more considered the industry-wide standard currency in the print sector. As in many other countries, there is a parallel consumer study, the TGI, whose data allow further insights into the consumer behaviour of print media users.

While the **online sector** has a de facto currency in the shape of comScore's MMX-MP product, there is no national organisation in the sector. As early as 1995, the ministries of communications and technology set up an authority, the Comitê Gestor da Internet no Brasil (CGI.br). CGI.br is in charge of infrastructure issues regarding the spread of the World Wide Web in Brazil and promotes studies on online consumption, without engaging in content constraints or controls.(144)

3.4. Africa, Asia, Oceania

3.4.1. South Africa

South Africa currently has a population of 56 million across a land area of around 1.2 million km². In an African context, South Africa is one of the strongest countries economically and is considered an emerging market. As with many African countries, South Africa boasts an enormous linguistic variety. Eleven languages, including Afrikaans and English, are considered official national languages.

South Africa's **media landscape** is heavily shaped by the Anglo-Saxon media tradition. The print media landscape consists of around 1,000 titles, with many regional newspapers amongst them, but also numerous magazines with various thematic orientations. Of the 23 daily newspapers, the biggest, the tabloid The Daily Sun, posts a circulation of around 250,000 copies. The newspaper belongs to the Media24 Group, which brings together the Napster corporation's print media activities. The company owns other important daily newspapers such as Beeld and Die Burger, as well as major online portals. Other major media companies with strong engagement in the print and online sector are the INMSA (Independent News & Media South Africa), owned by the Sekunjalo Independent Media Consortium, the Times Media Group and the Caxton & CTP Group, particularly strong in the regional newspaper market. Some of South Africa's major media companies are listed on the stock market, while most are under South African ownership.(145)

In South Africa, **broadcasting** is organised as a dual system. The South African Broadcasting Company (SABC) is owned by the state and at least technically independent from the government. However, their closeness to the state is a constant subject of political discussion. In the TV sector, the SABC operates with three main programmes and transmits programmes in all eleven official languages. Most SABC TV programmes contain advertising. Over the past few years they have suffered a shrinking market share through private competition. In 2004 SABC programmes posted a market share of around 63%(146), but currently they only achieve a combined market share of around 49%.(147)

The most important private free-TV broadcasting network is e.tv, part of the stock market-listed Hosken Consolidated Investments Ltd, whose main shareholder is a South African union. Corporations active in the pay TV sector include DStv/Multichoice and StarSat. The first belongs to Napster, a South African media firm operating worldwide, primarily online, with companies such as the small-ads portal OLX. StarSat belongs to the Chinese TV broadcasting corporation StarTimes, which is also active in other African countries.

There are some 400 **radio stations** in South Africa, with many of them local.(148) In terms of reach and market share the state-run SABC is by far the most important provider: the seven stations with the most powerful reach are all SABC stations. Overall SABC runs 20 radio stations, mostly funded through advertising, with at least one for each of the eleven official languages. The most popular SABC station, Ukhozi FM, on its own reaches nearly eight million people on a daily basis, making it arguably one of the biggest radio stations on the African continent.(149) Beyond that, there are numerous private stations, some of which also achieve a high reach. The most

important, Jacaranda FM, belongs to the South African Kagiso media group, which is active in the radio and online sector.

The Independent Communications Authority of South Africa (ICASA) is South Africa's **regulatory agency** for radio, TV and telecommunications. ICASA is officially independent from the state, and the agency's members are not allowed to be politicians or to have family ties with the media business. In terms of broadcasting, their main task lies in awarding broadcasting licences, guaranteeing competition and supervising the channels. Their regulations are aimed above all at strengthening national identity, e.g. through quotas for South African music on the radio or by protection and promotional measures for domestic film and TV production. The regulation of advertising media research does not fall within the remit of the agency.(150)

Over the past 3-4 years, the landscape of **currency research organisations** has reformed after suffering a high degree of disruption. The origin of the upheaval lay in problems surrounding the funding of currency research, secured by a voluntary contribution of the media industry levied on net advertising revenue. This contribution funded the South African Audience Research Foundation (SAARF), founded in 1974. SAARF conducted currency studies for all media genres in South Africa. When another sector organisation, the Advertising Standards Authority, got into financial difficulties, it was also supported by this contribution. This created some bad feeling, as an internal cross-subsidy (of this kind) within the sector had not been budgeted for. Together with discussions around the lack of transparency in financial flows and increasing tensions due to SAARF's limited flexibility, in mid-2013 the situation escalated. In 2015 the radio and television stations left SAARF and took broadcasting research into their own hands. The loss of 70% of their funding in effect spelled the end for SAARF.(151) The print media too took the opportunity to reform as the Publisher Research Council. The last SAARF study was issued in 2015, and today all media have left the SAARF, with only the advertising sector associations remaining. SAARF, or in the future the Marketing Research Foundation, would like to introduce a new currency study. The plans for replacing the current consumer and cross-media All Media and Products Study (AMPS) were presented in March 2017. An independent study is planned, going beyond the Establishment Survey of the new currency organisations. Whether the study will be implemented has not yet been decided while feedback from the market is awaited. The requirements and wishes voiced earlier, on the part of the advertising sector in particular, did show great interest in this; however, there were calls for fundamental changes, especially as regards funding.

The AMPS provided South Africa's advertising sector with a cross-media study, as has been demanded repeatedly in other countries for a long time. SAARF's inability to carry out the required reforms spelled the effective end of the organisation as well as the (temporary) end of convergent currency research.

At the moment, **radio and TV research** is conducted by the Broadcast Research Council of South Africa (BRC). BRC is a non-profit organisation founded in 2015 by the broadcast companies. As before the reorientation, the operational execution of

the Television Audience Measurements (TAMS) falls to the market research institute Nielsen. In terms of method, the TAMS is carried out by means of a panel and the Peoplemeter technology. The Radio Audience Measurement (RAMS) is realised by TNS using the diary method. Every year, the panel is subject to an external audit through a specialised British company. The 2016 audit report shows a marked improvement of the important indicators since the reorganisation of currency research.(152) At the end of March 2017, the BRC went beyond the two currency studies to present the first results of the Establishment Survey. This is a multimedia study at category level which comprises, amongst others, TV, radio, print and online media on all available platforms. The studies are funded by the stations themselves, or rather through a levy as was the case previously, and through selling data. The fact that funding continues to be via a fee on advertising turnover shows that this system has by and large been successful, enjoying a broad consensus in the South African media sector.

The Publisher Research Council (**PRC**) is the new currency organisation governing **print media**. This is a not-for-profit organisation organised as a JIC, with representatives from media companies as well as advertising associations. The PRC is responsible for the Publisher Audience Measurement Survey (PAMS), which is taking the place of the previous currency study and is explicitly conceived as part of the Establishment Survey, scheduled to integrate all South African currency studies into a shared data hub. PAMS is conducted as a face-to-face survey by Nielsen and is slated to be connected with the Establishment Survey in the third quarter of 2017. The PRC also wants to start an online panel in 2017. Funding is secured, as with the radio and TV research, through a levy on advertising revenue.

The **internet** currency research is organised by the local offshoot of the international Internet Advertising Bureau (IAB) association. The organisation, previously operating under its old name Digital Media and Marketing Association (DMMA), joined the IAB in 2014. Its more than 200 members include online publishers, creative agencies, media agencies and online service providers. IAB works with a technical measurement to provide data on website use. The survey is conducted through an Australian firm, Effective Measure.

3.4.2. South Korea

South Korea's land area of some 100,000 square kilometres is home to 51.5 million inhabitants, who share Korean as their national and official language. While freedom of the media was for a long time heavily curbed, the technical development of the country proceeded unencumbered: in 2006 South Korea boasted the world's highest rate of broadband connection as well as some 36 million mobile phones for a population at the time of just under 49 million.(153) This dynamic also shows in the digitalisation of radio: a substantial proportion of media time for TV and radio is spent on mobile devices.

South Korea has a broad **range of media**, with an extremely lively print market alongside a dual TV system with three state-funded stations (KBS, MBC, EBS) and around 50 private TV stations (the largest being SBS).(154) Radio has a long tradition

in South Korea, and the ever increasing global pioneering role of the republic in IT development promotes both the establishment and the use of information services online as well as mobile use, in particular of TV programmes watched by commuters on the way to and from work. Despite the wide spread of the internet, the quality of reporting in online media is still perceived as inferior, particularly in terms of balance and factual accuracy.

In 2016, the level of internet penetration in South Korea stood at just under 86%.⁽¹⁵⁵⁾ In 1995 the state introduced the 'Framework Act on Informatization Promotion', which is intended to support the entire population as well as all economic and political sectors in obtaining and processing information. The target is fast broadband connection across the entire territory. How much the technological development could impact on media production is shown by the example of the oldest daily newspaper in South Korea, Chosun Ilbo. The paper recently put together an editorial team for Virtual Reality (VR), not only to extend its reach to the millennials target group, but also to rethink the business model of the media firm as such: Chosun Ilbo spreads its VR services via a dedicated app, 'VR Chosun'.⁽¹⁵⁶⁾

The **media system** is heavily shaped by what is known as Chaebol: these corporate conglomerates (such as Samsung or Hyundai, for example) usually own media titles and even advertising agencies alongside their core businesses, which creates a two-fold imbalance: on the one hand the owners have both a knowledge advantage over their competitors, and the advantage of placing their own product advertising. On the other, their large advertising budgets feed into their own agencies and titles, putting the smaller media firms at a disadvantage, as they lose out on this revenue. This is where the state comes in, with its KOBACO (Korean Broadcast Advertising Corporation) agency, founded in 1981, which allocates commercial slots independently – not only to the large titles operating in the urban areas, but also to smaller, local organisations.⁽¹⁵⁷⁾

Some 10 daily newspapers dominate the **print media market**, with the leading titles (the morning newspaper Chosun Daily as well as the evening papers JoongAng Daily and Dong-a Daily) representing a conservative world view. The left/liberal political range finds an outlet in the Hankyoreh Daily and Kyunghyang Daily. In 2010, the Korean Communications Commission (**KCC**) opened the television market to newspaper publishers, a move criticised as strengthening the right-wing/conservative voice in the country.⁽¹⁵⁸⁾

Another characteristic of the South Korean media landscape is censorship, which in the first half of the 20th century was fairly obvious. Today South Korea is considered to be 'fairly unrestricted'⁽¹⁵⁹⁾ in daily practice. The constitution does guarantee, in Article 21, the fundamental freedom of the press. At the same time, in the same article of law, that basic freedom is limited, in particular as regards libel.⁽¹⁶⁰⁾ Online reporting is the medium most subject to pressure from the Korea Communications Standards Commission (KCSC), which in its role as public agency is striving for a 'culture of safe internet communication'⁽¹⁶¹⁾, and enjoys far-ranging powers in deleting 'libellous' content. The journalism community's commonly practiced 'careful' handling of freedom of opinion is often seen as self-censorship,⁽¹⁶²⁾ resulting in

reporting that is loyal to the government and not very confrontational – at least towards the government.

Following the model of the USA's Federal Communications Commission (FCC), February 2008 saw the founding of the Korean Communications Commission (KCC). In contrast to the FCC, the KCC is not independent from the government but reports directly to the President. The commission emerged from the former Department for Information and Communications (Ministry of Information and Communication, MIC). Its main purpose consists of bringing together broadcast and telecommunications, i.e. promoting IPTV and other digital technologies. The KCC's responsibilities comprise the regulation of broadcasting as well as the internet. Its remit includes the allocation of broadcast licences and, amongst other things, the evaluation of broadcast quality as well as the safeguarding and promotion of media diversity. Furthermore, the state exercises influence on media content by having its say in terms of the staff working at licenced stations: the CEO is appointed by the KCC.

South Korean **currency research** is less clearly structured and consensual than in comparable countries. One reason for the widespread lack of sector-wide consensual currencies lies in the fact that within the Chaebol system, advertising contracts are not awarded according to performance criteria but to the advertising media firm's affiliation. While a number of companies publish ratings, the client and quality control standards remain undisclosed. These tasks are dealt with by Owned Services (OS), in which the media corporations have no part.(163) The reach studies are conducted without explicit involvement on the part of the regulator.

Until 1998, Media Service Korea (MSK) was the only institute carrying out **TV audience measurement**. MSK gathered its data in a panel comprising 300 households recruited in Seoul. With the takeover of MSK in 1999 the international corporation Nielsen entered the South Korean audience research market. MSK's competitor, the South Korean company Total National Multimedia Statistics (TNmS), was founded in 1998. While the measurement methods of the two companies have similarities, their results often diverge by around two or three percent, for unknown reasons. Supposedly the differences are rooted in the fact that unlike TNmS, Nielsen Korea excludes visitors in panel households from the ratings.(164) The rivalry between Nielsen Korea and TNmS has already led to legal disputes. In 2009 Nielsen Korea accused its competitor of having manipulated the data. TNmS is currently using the strategy of discrediting Nielsen through their non-Korean origin while emphasising their own strong and long-standing roots in South Korean society. In an interview the founder and CEO of TNmS, Min Kyung-sook, explained that TNmS was interested in spreading South Korean innovations in the audience measurement sector. In order to gain the trust of non-Korean partners, TNmS would have to present itself as a credible South Korean brand. This is why Min Kyung-sook is asking the South Korean state to throw more of its weight behind the domestic research firm and to rely on TNmS rather than foreign firms.(165)

A study with significance for **radio usage**, the Metro Radio Study (MRS), has been conducted since 2009 by the market research company Hankook Research, by means of a CATI survey. The Hankook Research Company is also active in

readership research. Its HRC Media Index is based on a face-to-face survey carried out as part of a consumer study. Alongside media usage behaviour, this survey also examines the interviewees' consumer behaviour and lifestyle, as well as psychological factors.

Nielsen KoreanClick was the result of a 2009 merger between Nielsen and Koreanclick and measures **internet use** (on PC and Android smartphones) in a representative sample for the Korean population aged between 7 and 65.(166)

3.4.3. New Zealand

The island state of New Zealand consists of numerous islands, with the capital, Wellington, situated on North Island. Currently the country has about 4.7 million registered inhabitants and a parliamentary democracy that corresponds officially in English and Maori. Its particular geographical-geological situation makes New Zealand a separate case, in terms of culture too: with the country lying on both the Australian and Pacific plates, culturally it is shaped by its proximity to both Australia and Oceania. This position is reflected in a **media system** that has to represent the two official languages, but is also heavily shaped by imported content from other English-language countries, primarily the UK and USA. Despite being a small state New Zealand is blessed with an extremely rich range of media: 26 daily newspapers, 3,700 magazines, plus a total of 88 TV and 212 radio stations serve the inhabitants of both main islands across a surface area of just under 270,000 square kilometres.(167) The size of the country makes a local orientation of (private) broadcasting unattractive, so that local and regional reporting is primarily taken on by the printed press. In fact there is no daily newspaper aiming explicitly for a national perspective.(168)

One lamentable regional characteristic of both New Zealand and Australia is the low degree of provider choice: in New Zealand the big cities are covered by a single daily newspaper, belonging to one of two publishing houses, Fairfax Media and APN News and Media respectively (with both headquartered in Australia, and the latter belonging to an Irish company).(169) At the start of the 21st century the ownership patterns looked very different: the majority of papers in circulation were published by either Independent Newspapers Limited (INL) or Wilson and Horton Limited, with INL owning over 80 titles and Wilson and Horton serving nearly 60% of the newspaper market.(170) And now a further significant shift is imminent, with Fairfax and APN planning to merge. This merger would give the new company control over 90% of the **newspaper market**.(171) To the present day there is no daily quality sheet covering the whole country, with this role taken on by both the tabloids and the weekly press.(172)

Another small-state phenomenon is the major importance of bought-in content and formats, for linguistic reasons from the Anglo-Saxon markets (USA and UK): according to a report by The Churches Agency on International Issues, more than 90% of New Zealand media are not nationally owned.(173)

In New Zealand, commercial, professional **TV** has only been available since 1960. The most obvious obstacles are the small market with its high investment costs, and the geology interfering with the signal, which meant that in its beginnings the TV market was divided between four regional providers. They only came together later, in 1969, to form a single network (in time to transmit the moon landing).(174) State-funded broadcasting has only been a reality since the advent of TV, with privately run radio stations existing previously. This public service is taken on by Radio New Zealand, Māori Television and TV New Zealand, with only the latter operating on funding provided by advertising.

A 2002 agreement reserved frequencies for dedicated broadcasting for the Maori population (in their own language).(175) Although New Zealand's indigenous population had been diminishing since the early 19th century, its recovery into the 1990s meant that dedicated broadcasting gained in importance.

The radio market is split between the two commercial providers, The Radio Network (also owned by APN) and RadioWorks (also owned by an Australian company), as well as two state-funded stations, Radio New Zealand National and Radio New Zealand Concert. Most of the free-to-air TV is provided by the two state-funded stations Television New Zealand (TV One and TV2) and Māori Television, as well as TV3 and Four (both owned by Media Works, also the owner of RadioWorks), the racing network Trackside and Prime Television (part of the Sky Television portfolio).(176)

With an internet penetration of almost 90%, New Zealand has near complete online connection.(177) The most popular news portal in New Zealand is www.stuff.co.nz, which is part of Fairfax Media.(178) As is the case everywhere else, the establishment of the internet has initiated a decline in circulation of the daily and weekly newspapers. In response to this, alongside the aforementioned Stuff, a successful online platform was established in the shape of the NZ Herald (owned by the NZME media conglomerate).(179)

Until 1936 radio broadcasting was not funded by the state, and was monitored by the Post and Telegraph Department. After then, **regulation** was taken over by the National Broadcasting Service.(180) The Broadcasting Act of 1989 clarifies the legal bases of broadcast regulation and defines the remit of the Broadcast Commission ('NZ On Air', promoting content diversity), as well as the Broadcasting Standards Authority (BSA, integrity of reporting). The regulation of TV content is also shaped by the following bodies: the Advertising Standards Agency (ASA), Ministry for Economic Development, the Ministry of Culture (which oversees the BSA), the Commercials Approvals Bureau and Advertising Pre-Vetting Systems.(181) Since 1972 the press, which for historic reasons was much less tightly regulated, has been subject to the (ethical) self-regulation of the Press Council, which is also funded by the industry.(182)

NZ on Air's remit to promote media diversity also requires the authority to understand the current situation and developments. In response, the BSA and NZ on Air have commissioned studies on the media usage of children(183), for instance, or the Total

Audience study 'Where are the audiences?'

With the exception of a fee for accessing the data, **currency research** is funded through the media. In the TV sector, currency research is instigated by the associations of the private and public TV broadcasters. They commission Nielsen to measure viewer behaviour, with the data gathered by means of the Peoplemeter.⁽¹⁸⁴⁾ The current contract runs up until 2018, and discussions on the new contract started recently. One point of criticism of the survey used until now is to do with the type of measurement, with the data being collected in 15-minute periods. This means that figures for five-minute commercial breaks are presumed to be too high. Clients also express a desire to bring in online use, something that is scheduled to change in the new contract.

Until 2016 the association of **private radio stations**, the RBA, was conducting separate surveys of their user figures in collaboration with TNS and the public broadcaster RNZ. In 2015 the parties agreed to conduct a shared usage survey and signed a memorandum of understanding. The leadership of the project lies with the RBA's Research Committee, with the public RNZ contributing pro rata to the costs of the survey, ranging between 1-2 million NZD. 2016 marked the first collection of the new currency research by the GfK. The study is based on listeners' print and online diary entries.

Nielsen also regularly conducts an independent **readership survey**, using a methodology which has since 1956 also served as the basis for the readership survey in the United Kingdom. An additional presence in the market is the market research company Roy Morgan Research⁽¹⁸⁵⁾, but the majority of the reports on readership and reach are based on figures provided by ABC and Nielsen.

Several competing players operate in the **online sector**. Nielsen is already commercialising individual products such as Digital Ad Ratings, while comScore is a relatively recent market presence. For this reason the figures cannot always be compared and can be confusing. This investigation, for example, encountered several different sources for access, including Google Analytics. There is criticism of the situation where several companies are engaged in internet measurement.

4. Tabular Overview of Comparable Countries

4.1. Neighbouring Countries

4.1.1. Austria

Population: 8.7 million

Land Area: 83,878 km²

Official Language: German

Regulation	
Regulator:	KommAustria
Responsible for:	Radio, TV, Print, Internet
Organisational form:	Independent authority
Execution:	RTR-GmbH (under federal ownership)
Website:	
Relationship with currency organisation:	No supervisory function over currency research

Austrian TV Currency	
Leading Organisation:	Name: Arbeitsgemeinschaft TELETEST (AGTT)
Organisational form:	MOC, association under Austrian law
Year founded:	2005 (foundation of the ARGE), from 2007 (commissioning entity for the TELETEST)
Members:	ORF, ORF Enterprise, ATV (now part of P7S1P4), ServusTV, ProSiebenSat1 PULS4, IP Austria, Goldbach Media Austria (marketer)
Staff:	No in-house operational activity
Currency study funding:	By participating networks (graded by market share and tech. reach) as well as data licensees
Turnover/costs:	No information available
Additional products / services:	Video streaming reach measurement
Website:	www.agtt.at
Currency:	Name: TELETEST
	Execution: GfK Austria
	First survey: 1991
	Type of survey: Electronic device (in the panelist's residence)
	Current projects: Video streaming reach measurement

Austrian Radio Currency	
Leading Organisation:	Name: Arbeitsgemeinschaft Radiotest
	Organisational form: MOC, association under Austrian law
	Year founded: 1993
	Members: Radio Marketing Service GmbH Austria, ORF, KroneHit Radio (marketer)
	Staff: No in-house operational activity
	Currency study funding: Through members and data licensees
	Turnover/costs: No information available
	Additional products / services: None
	Website: None
Currency:	Name: Radiotest
	Execution: GfK Austria
	First Survey: 1993
	Type of survey: Survey (CATI)
	Additional information: In May 2016 GfK was forced to admit having manipulated listener figures in favour of, but without the knowledge of, the ORF. With trust in Radiotest damaged, negotiations for compensation payments are ongoing. In 2018 the contract with GfK comes to an end, with a new tender in 2017.

Austrian Print Currency	
Leading Organisation:	Name: Verein Arbeitsgemeinschaft Media - Analysen
	Organisational form: JIC, association under Austrian law
	Year founded: 1965
	Members: Austrian newspapers and magazines, media agencies, Infoscreen,(186) RMS Austria (radio) and ORF Enterprise (TV/radio)(187)
	Staff: 3
	Currency study funding: Through members and data licensees
	Turnover/costs: No information available / MA 2010: 2.5 million CHF
	Additional products / Services: None
	Website: www.media-analyse.at
Currency:	Name: Media-Analyse
	Execution: GfK Austria, IFES, HTS
	First survey: 1965
	Type of survey: Survey (CAWI, CAPI, CASI)

Austrian Online Currency	
Leading Organisation:	Name: ÖWA
	Organisational form: JIC, under Austrian law
	Year founded: 1998, independent since September 2001
	Members: Advertising media services (mainly media websites), services without advertising (e.g. media associations or the City of Vienna), as well as media agencies
	Staff: 4.5
	Currency study funding: Membership fees as well as members' operational and study contributions
	Turnover/costs: < 5 million €
	Additional products / services: ÖWA Basic (accessed data)
	Website: www.oewa.at
Currency:	Name: ÖWA Plus
	Execution: TNS Infratest, Ebert + Grüntjes, HTS, Interrogare, Kantar Media Spring
	First survey: 2001
	Type of survey: Full survey plus enhancement by onsite & offsite survey

Austrian Convergent Study	
Leading Organisation:	Name: Verein Media Server
	Organisational form: MOC, association under Austrian law
	Year founded: 2012
	Members: AGTT (TV), Radiotest, VMA (print), ÖWA(188) (internet), OSA (outdoor advertising) and agencies' association (IGMA)
	Staff: 2
	Funding: Membership fees, revenue from the activity, as well as donations/grants where applicable
	Funding breakdown: AGTT & VMA: 30% Other: 10%
	Turnover/costs: No information available
	Website: www.vereinmediaserver.at
	Execution: GfK Austria and IFES
	First survey: Completed in January 2017
	Type of survey: Fusion of existing data from the 5 currency organisations plus additional CATI/CAWI survey (2-part)
	Purpose: Developed from the VMA cross-media study (better data comparability)

4.1.2. Germany

Population: 82.8 million

Land Area: 35,7376 km²

Official Language: German

Regulation	
Regulator for private radio and TV:	die medienanstalten – ALM GbR
Website:	www.die-medienanstalten.de
Regulator for public-service radio and TV:	Supervisory bodies ARD and ZDF
Website:	ZDF: www.zdf.de Deutschlandradio: www.deutschlandradio.de [ditto]
Relationship with currency organisation:	No supervisory function over currency research

German TV Currency	
Leading Organisation:	Name: AGF Videoforschung
	Organisational form: MOC, GmbH (plc)
	Year founded: 1988
	Shareholders: ARD, ZDF, ProSiebenSat.1 Media SE and Mediengruppe RTL Germany, Sky Germany, WeltN24
	Additional partners: Organisation Werbungtreibende im Markenverband (OWM, federation of brand advertisers) and Organisation der Mediaagenturen (OMG, media agencies)
	Staff: 5
	Currency study funding: Through shareholders (basic contribution plus media analysis-dependent percentage), as well as licensees
	Turnover/costs: No information available
	Additional products / Services: None
	Current projects: Integration of streaming/moving image use. Further opening to additional owners and change of legal statute to a plc with associated structural adaptation
	Website: www.agf.de
Currency:	Name: AGF/GfK TV panel
	Execution: TV: GfK, streaming: Nielsen
	First survey: 1985
	Type of survey: Electronic measurement device (in the panellist's residence) including measurement of mobile devices

German Radio Currency	
Leading Organisation:	Arbeitsgemeinschaft Media-Analyse e.V. (agma) (Media-Micro-Census GmbH)
Organisational form:	JIC, non-profit association
Year founded:	1954
Members:	Ca. 230 companies (media, advertising and media agencies and advertisers)
Currency studies funding:	Through agma members and licensees
Turnover/costs	No information available
Currency:	Name: ma Radio
Execution:	GfK, IFAK, IPSOS, Kantar TNS
First survey:	1972 (since 1987 separate from print survey)
Type of survey:	CATI (twice per year, ca. 65,000 interviews), since 2014: ma IP Audio (logfile analyses)
Website:	www.agma-mmc.de/media-analyse/radio.html
Current developments/challenges:	Improvement of nationwide radio use measurement via DAB+ (coordination with ARD, Deutschlandradio, Media Broadcast, private stations and state media authorities regarding pilot project)

German Print Currency	
Leading Organisation:	Arbeitsgemeinschaft Media-Analyse e.V. (agma) (Media-Micro-Census GmbH) (see radio currency)
Currency:	Name: ma daily newspapers
Execution:	GfK, IFAK, IPSOS, Kantar TNS, Marplan/USUMA
First survey:	1954
Type of survey:	CASI (39,000 interviews) and Mediascan (2,000 respondents)
Website:	www.agma-mmc.de/media-analyse/tageszeitungen.html

German Online Currency	
Leading Organisation:	Name: Arbeitsgemeinschaft Online Forschung (AGOF) Arbeitsgemeinschaft Media-Analyse e.V. (agma)
	Organisational form: JIC/TRCC, non-profit association
	Year founded: 2002
	Members: Online Vermarkter (Online Marketers), Senat der Wirtschaft (Senate of Economy), Bundesverband Digitale Wirtschaft (BVDW, digital economy federation), Bundesverband Medien und Marketing (BVMM, media and marketing federation)
	Staff: 13
	Currency study funding: Through AGOF members, study participants and licensees
	Turnover/costs: No information available
	Additional products / services: 'Digital facts' study: media market study on advertising media going beyond reach; 'Brand facts' study: on the representative use of all participating websites (including those without advertising) with socio-demographic information. AGOF Akademie: seminars on media planning and the online marketing of the studies
	Website: www.agof.de
Currency:	Name: MA Internet(189)
	Execution: AGOF Services GmbH
	First survey: 2002
	Type of survey: Multi-method model, technical measurement of all participating online advertising media services, combined with onsite/InApp survey, smartphone panel and telephone survey
	Website: http://www.agma-mmc.de/media-analyse/internet.html

4.1.3. Italy

Population: 60.6 million

Land Area: 301,338 km²

Official Language: Italian

Regulation	
Regulator:	Autorità per le Garanzie nelle Comunicazioni (AGCOM)
Responsible for:	Radio, TV, internet
Organisational form:	Independent authority
Website:	www.agcom.it
Relationship with currency organisation:	Legal supervisory duty over currency research

Italian TV Currency	
Leading Organisation:	Auditel
Organisational form:	JIC, p.r.l (plc)
Year founded:	1984
Owners:	UPA (Utenti Pubblicità Associati, advertisers), ASSOCOM (Associazione Aziende di Comunicazione, association of communications companies), UNICOM (Unione Nazionale Imprese di Comunicazione è l'Associazione, communications sector association), FIEG (Federazione Italiana Editori Giornali, journalists' association), CRTV (Confindustria Radio Televisioni, networks union), RAI, R.T.I. (Mediaset), Sky, La Sette
Staff:	5
Currency study funding:	Through members and data licensees
Turnover/costs:	No information available
Additional products / services:	None
Website:	www.auditel.it
Currency:	Name: Auditel
Execution:	Nielsen, Ipsos
First survey:	1984
Type of survey:	Electronic measuring device (in the panellist's residence)
Current developments:	Panel renewal and streaming project

Italian Radio Currency		
Leading Organisation:	Name:	Tavolo Editori Radio (TER)
	Organisational form:	MOC, p.r.l (plc)
	Year founded:	2016 (2011: dissolution of the predecessor organisation Audiradio)
	Owners:	Major radio stations/networks, incl. associations
	Staff:	No information available
	Currency study funding:	Through members and data licensees
	Turnover/costs:	No information available
	Additional products / services:	None
	Website:	None
Currency:	Name:	No specific name for radio data
	Execution:	GfK, Ipsos
	First survey:	2017 (first data expected[<i>HA: 'published'?</i>] in summer 2017)
	Type of survey:	Survey (CATI)

Italian Print Currency		
Leading Organisation:	Name:	Audipress
	Organisational form:	JIC, p.r.l (plc)
	Year founded:	1992
	Owner:	FIEG, UPA, Assap Servizi (Assocom), Unicom, Auditel (TV-JIC)
	Staff:	4
	Currency study funding:	Through publishers
	Turnover/costs:	No information available
	Additional products / services:	None
	Website:	www.audipress.it
Currency:	Name:	Audipress
	Execution:	Doxa, Ipsos, Reply
	First survey:	1992
	Type of survey:	Survey (CAPI)
	Current projects:	Relaunched study in January 2017, new study for all print media, minor improvements and updates

Italian Online Currency	
Leading Organisation:	Name: Audiweb
	Organisational form: JIC, p.r.l (plc)
	Year founded: 2007
	Members: Fedoweb (50%, online publishers), UPA (25%, advertisers), Assap Servizi (25%, Assocom)
	Staff: 3+1 (for PR, media)
	Currency study funding: Membership fees, as well as members' operation and study contributions
	Turnover/costs: 4-4.5 million CHF (turnover 2016)
	Additional products / services: None
	Website: www.audiweb.it
Currency:	Name: Audiweb
	Execution: Nielsen
	First survey: 2007
	Type of survey: Full survey plus F2F interviews, 3 available panels (for PC, smartphones, tablets)
	Current projects: Mobile measurement (smartphones/tablets) and integration of Auditel for TV (panel fusion).

4.1.4. France

Population: 64.2 million
Land Area: 632,834 km²
Official Language: French

Regulation	
Regulator:	Conseil supérieur de l'audiovisuel (CSA)
Responsible for:	Radio, TV, internet
Organisational form:	Independent authority
Website:	www.csa.fr
Relationship with currency organisation:	No supervisory mandate over currency research

French TV Currency		
Leading Organisation:	Name:	Médiamétrie
	Organisational form:	JIC (TRCC), AG
	Year founded:	1985
	Owners:	France Télévisions, TF1, Radio France, Canal+, Europe1, RMC, RTL, Union des Annonceurs, Publicis, Aegis, Havas, DDB, FCB and more (largest share with first 3 mentioned, 35% TV, 35% advertising industry, 27% radio and 3% other)
	Staff:	641 (entire company)
	Funding:	Through members and data licensees
	Turnover/costs:	94 million CHF (of which approx. 20% abroad)
	Additional products / services:	Offers a broad range of services: ad-hoc studies for customers, reports for parties interested in various subjects, sale of TV data from 100 countries, RateOnAir (Personal Peoplemeter, in-house development), NOTA New on the Air (monitoring of TV start-ups worldwide with information summary)
	Website:	www.mediametrie.com
Currency:	Name:	Médiamat
	Execution:	GfK
	First survey:	1985
	Type of survey:	Electronic measuring device (in the panellist's home) and measurement of mobile devices

French Radio Currency		
Leading Organisation:	Name:	Médiamétrie (see TV Currency)
Currency:	Name:	126 000 Radio
	Execution:	In-house
	First survey:	1985
	Type of survey:	Survey (CATI)
	Current projects:	There are plans for deploying the Personal Peoplemeter developed in-house from 2018
	Additional information:	Origin of the name: 126,000 interviews annually

French Print Currency		
Leading Organisation:	Name:	Alliance pour les Chiffres de la Presse et des Médias (ACPM)
	Organisational form:	JIC, association
	Year founded:	1922 (foundation OJD), 2015 (merger of OJD and SAS Audipresse to form ACPM)
	Owners:	Print media, media agencies and advertisers
	Staff:	20
	Currency study funding:	Through publishers and agencies
	Turnover/costs:	11 million CHF[<i>HA: umzurechnen in...?</i>]
	Additional products / services:	ONE Global: press use for Print, PC, tablet and smartphone in collaboration with Médiamétrie
	Website:	www.acpm.fr
Currency:	Name:	ONE
	Execution:	Ipsos Connect, Kantar TNS
	First survey:	1992
	Type of survey:	Survey (CAWI, CAPI)
	Website:	http://one.acpm.fr/2016_09/index.html
	Audit:	Centre d'étude des supports de publicité (CESP)

French Online Currency		
Leading Organisation:	Name:	Médiamétrie//NetRatings (Médiamétrie see TV currency)
Currency:	Name:	Audience Internet Global
	Execution:	Joint venture with Nielsen
	First Survey:	2000
	Type of survey:	Full survey with panel
	Additional products/ services:	Further data on internet use, e.g. channels or advertising effect, also additional Nielsen products

4.2. Rest of Europe

4.2.1 Netherlands

Population: 17 million

Land Area: 41,548 km²

Official Language: Dutch

Regulation	
Regulator:	Commissariaat voor de Media (CvdM)
Responsible for:	Radio, TV and internet
Organisational form:	Independent authority
Website:	www.cvdM.nl
Relationship with currency organisation:	No supervisory mandate over currency research

Netherlands TV Currency	
Leading Organisation:	Name: Stichting Kijk Onderzoek (SKO)
	Organisational form: JIC, foundation
	Year founded: 2002 (previously CKO)
	Members: BVA (advertisers' association), PMA (agencies' association), Screenforce (private TV), NPO (public broadcasting) (marketer)
	Staff: 5
	Currency study funding: Through participating networks, as well as data sales
	Turnover/costs: No information available
	Website: www.kijkonderzoek.nl
Currency:	Name: Kijkonderzoek
	Execution: GfK (panel & data), Nielsen (categorisation and post-broadcast control), online: Kantar TNS Nipo, comScore (Census data)
	First survey: 1965 (diary method) 2002 (electronic meter measurement, panel) 2008 (measuring online video streams of the most popular TV stations) 2013 (new concept: Video Total)
	Type of survey: Electronic measuring device (in the panellist's home) plus measurement of mobile devices
	Current developments: Cross-media & cross-platform measurement; fusion of online multi-platform video data with the TAM data for overall figures.
	Additional information: - First country worldwide to provide daily data on TV content consumed online - Online video reporting, as well as from 2018 online advertising tracking

Netherlands Radio Currency		
Leading Organisation:	Name:	Natioonal Luister Onderzoek (NLO)
	Organisational form:	JIC, foundation
	Year founded:	2012 (previously CLO)
	Members:	RAB (private radio), NPO (public R/TV), BVA (advertisers' association, PMA (agencies' association) (marketers)
	Staff:	<2 (director: 1,200h, of which 50% governance paid through JIC, 50% of research paid by radios; secretary (166h)
	Currency study funding:	Through participating networks, as well as data licensees
	Costs:	Study: 1.2 million €, 0.4 million € for future and shared projects
	Additional products / services:	None
	Website:	www.nationaalluisteronderzoek.nl/luistercijfers.html
Currency:	Name:	Natioonal Luister Onderzoek
	Execution:	GfK
	Type of survey:	Diary / Portable Peplemeters (for trial purposes)
	Current developments:	- Study currently open to tender - Biennial Audio Distributie Survey: information on platform distribution (e. g. DAB+) of the listeners - Planned: survey of radio via IP

Netherlands Print Currency		
Leading Organisation:	Name:	Nationaal Onderzoek Multimedia (NOM)
	Organisational form:	JIC, foundation
	Year founded:	2001
	Members:	NDP Nieuwsmedia (news media association, formerly publishers' association) MMA (magazine association), BVA (association advertisers), PMA (agency association)
	Staff:	5
	Currency study funding:	Through print media and data customers
	Costs:	No information available
	Additional products / services:	Various other studies
	Website:	www.nommedia.nl
Currency:	Name:	NOM Print Monitor
	Execution:	GfK
	Type of survey:	Survey (CAWI)

Netherlands Online Currency	
Leading Organisation:	Name: Nederlands Online BereiksOnderzoek (NOBO)
	Organisational form: MOC, loose association
	Year founded: 2016
	Members: 20 major media (Vinex, SKO, NOM), partly Facebook
	Staff: 1.2
	Currency study funding: Membership fees
	Costs: 1 million €, 50k per member
	Additional products / Services: None
	Website: www.vinex.nl/nobo
Currency:	Name: NOBO
	Execution: Kantar TNS (panel, model), comScore (census)
	First survey: 2016 (previously GfK)
	Type of survey: Full survey with panel
Netherlands Convergent Study	
Currency:	Name: Media:Tijd, CrossMedia:Tijd
	Categories included: TV, radio, print, internet, outdoor advertising
	Execution: GfK
	Type of survey: Media:Tijd: 91% online diary, 9% CATI CrossMedia:Tijd: data merger of existing currencies
	Website:

4.2.2. Belgium

Population: 11.3 million

Land Area: 30,528 km²

Official Languages: Dutch, French, German

Regulation in Belgium	
Regulator:	Conférence des régulateurs du secteur des communications électroniques (CRC)
Organisational form:	Conference bringing together the regulators from the three linguistic communities plus regulator post/telecommunications services
Website:	None

Regulation in the Flemish Community	
Regulator:	Vlaamse Regulator voor de Media
Responsible for:	Audiovisual in radio, TV, internet
Organisational form:	Independent authority
Website:	www.vlaamseregulatormedia.be
Relationship with the currency organisation:	No supervisory mandate over currency research

Regulation in the French-speaking Community	
Regulator:	Conseil supérieur de l'audiovisuel (CSA)
Responsible for:	Audiovisual content in radio, TV, internet
Organisational form:	Independent authority
Website:	www.csa.be
Relationship with the currency organisation:	No supervisory mandate over currency research

Regulation in the German-speaking Community	
Regulator:	Medienrat der Germansprachigen Gemeinschaft Belgiens
Responsible for:	Audiovisual content in radio, TV, internet
Organisational form:	Independent authority
Website:	www.medienrat.be
Relationship with currency organisation:	No supervisory mandate over currency research

Belgian TV Currency		
Leading Organisation:	Name:	Centrum voor Informatie over de Media bzw. Centre d'Information sur les Médias (CIM)
	Organisational form:	JIC, Non-profit association
	Year founded:	1971
	Members:	Over 225 members (of which over 180 media, as well as advertisers, advertising and media agencies)
	Staff:	March 2017: 10 (normally 10-12)
	Currency study funding:	Through members and data subscribers
	Funding split:	Split into costs for permanent running of CIM and cross-media study (costs split between media and advertising sector by key indicators) as well as the costs of the study (91% borne by the media)
	Turnover/costs:	No information available
	Additional products / services:	Certifications, e.g. print circulation
	Website:	www.cim.be
Currency:	Name:	CIM TV
	Execution:	GfK (panel), Nielsen (time logging), Profacts (online use survey)
	First survey:	1997
	Type of survey:	Electronic measuring device (in the panellist's home)
	Current developments:	Current tender for measuring online video advertising; revision of project Video Total (TV + TV advertising + online video + online advertising); data merger being discussed
	Website:	http://www.cim.be/nl/media/televisie/21

Belgian Radio Currency		
Leading Organisation:	Name:	CIM (see TV currency)
Currency:	Name:	CIM Radio
	Execution:	GfK
	First survey:	1971
	Type of survey:	Diary (3 batches/year)
	Website:	http://www.cim.be/nl/media/radio/23

Belgian Print Currency		
Leading Organisation:	Name:	CIM (see TV currency)
Currency:	Name:	L'étude CIM Presse
	Execution:	Ipsos (new contract 2016-2019, previously TNS Media)
	First survey:	1971
	Type of survey:	Survey (CASI/CAPI)
	Current developments:	The new readership study started in June 2016, with a new institute and new targets. Instead of LpA the estimated daily readership is surveyed, plus internet.
	Additional products/services:	Circulation survey and L'étude TGM, a consumer study carried out with the respondents following the L'étude CIM Presse
	Website:	http://www.cim.be/nl/media/pers/24

Belgian Online Currency		
Leading Organisation:	Name:	CIM (see TV currency)
Currency:	Name:	L'étude CIM Internet
	Execution:	Gemius
	First survey:	2000 (traffic measurement), 2005 (audience measurement), from 2014 (traffic and audience) by Gemius
	Type of survey:	Measurement of registered sites/apps/streaming & 3 panels (PC, tablet, smartphone)
	Current developments:	Measuring websites/apps not registered with CIM (foreign/ non-commercial sites)
	Website:	www.rankingbe.com

Belgian Convergent Study		
Leading Organisation:	Name:	CIM (see TV currency)
Currency:	Name:	L'étude CIM CrossMedia
	Execution:	GfK (Survey), RSMB (technical execution of the data merger)
	Aim:	Merging the individual currency studies with the L'étude TGM (see L'étude Presse) and the L'étude HUB into a single database
	First survey:	2012
	Type of survey:	CASI/CATI + data from the currency studies
	Current developments:	Last published 2015, being redesigned and redeveloped, new focus: cross-platform

4.2.3. Denmark

Population: 5.7 million

Land Area: 42,921 km²

Official Language: Danish

Regulation	
Regulator:	Radio- og tv-nævnet
English Name:	Radio and TV Council
Responsible for:	Radio and TV
Organisational form:	Council
Website:	www.slks.dk/medier
Information:	The council forms part of the Slots- og Kulturstyrelsen (Agency for Culture and Palaces, SLKS), the same entity deals with supporting the press
Relationship with currency organisation:	No supervisory mandate, relevant market participants (DR, TV2) however are state-owned (and funded)

Danish TV Currency	
Leading Organisation:	Name: No official name; Danish steering committee for TV usage survey
	Organisational form: MOC
	Year founded: 1988
	Clients: 8 networks (DR, TV2, MTG, FOX, Discovery, Disney, Turner, Viacom)
	Staff: No in-house operational activity
	Currency study funding: Through participants and data licensees
	Turnover/costs: No information available
	Additional products / services: None
	Website: www.kantargallup.dk/markedsfokus/tv-radio-audience
Currency:	Name: Kantar Gallup Seer-undersøgelsen (viewer survey)
	Execution: Kantar Gallup
	First survey: 1988
	Type of survey: Data merger: traditional panel, individual panel (all devices), web panel, census data
	Current developments: From 1 Jan 2017 new TV panel; new measurement of TV use on mobile devices, Web TV, streamed and time-delayed use across all devices

Danish Radio Currency		
Leading Organisation:	Name:	No official name; Danish steering committee for radio usage survey
	Organisational form:	MOC
	Year founded:	1997
	Clients:	DR, private radio stations, Danske Medier Research (representing local radio), Bauer Media Denmark
	Staff:	No in-house operational activity
	Currency study funding:	Through participants and data licensees
	Turnover/costs:	No information available
	Additional products / services:	None
	Website:	www.kantargallup.dk/markedsfokus/tv-radio-audience
currency:	Name:	Kantar Gallup Radiometer, Gallup Lokalradio Index
	Execution:	Kantar Gallup
	First Survey:	1997
	Type of survey:	National networks: Personal Peplemeter, local radio: CATI
	Current developments:	Experimental phase: podcast measurement

Danish Print Currency		
Leading Organisation:	Name:	No in-house name, steering committee made up of clients
	Organisational form:	JIC
	Year founded:	1997
	Members:	Danske Medier Research, Kreativitet & Kommunikation (agencies' association)
	Staff:	No in-house operational activity
	Currency study funding:	Through participants and data licensees
	Turnover/costs:	No information available
	Website:	www.kantargallup.dk/markedsfokus/index-danmarkgallup
Currency:	Name:	Index Danmark/Gallup
	Execution:	TNS Gallup
	First survey:	1997/2001
	Type of survey:	Survey (self-completed)
	Additional information:	- Index Danmark consists of two parts: a currency study and a consumer survey - 2001: establishment of a Development Fund (funded by JIC and TNS Gallup)
	Current developments:	Planned for 2 nd half 2017: integration of e-paper use

Danish Online Currency		
Leading Organisation:	Name:	Danske Medier Research
	Organisational form:	MOC
	Year founded:	2016
	Clients:	Danske Medier (Danish Media association, merger of various associations, categories: print, internet, radio), participation in studies open to all publishers/broadcasters
	Staff:	3
	Currency study funding:	Through participants and data licensees
	Turnover/costs:	No information available
	Additional products / services:	None
	Website:	www.danskonlineindex.dk
Currency:	Name:	Dansk Online Index/ Kantar Gallup (up to 2015: Danish Media Research / gemiusAudience)
	Execution:	Kantar Gallup
	First Survey:	1997 (from 2016 Kantar Gallup)
	Type of survey:	Full survey with panel

4.2.4. Sweden

Population: 10 million

Land Area: 447,435 km²

Official Language: Swedish

Regulation	
Regulator:	Myndigheten för press, radio och tv
Responsible for:	Press, radio and TV
Organisational form:	Culture Ministry department
Website:	www.radioochtv.se
Relationship with currency organisation:	No supervisory mandate over currency research

Swedish TV Currency	
Leading Organisation:	Name: Mediamätning i Skandinavien (MMS) AB (Media measurement in Scandinavia)
	Organisational form: JIC, AG
	Year founded: 1992
	Members: SVT (public), MTG, TV4, Discovery Networks Sweden (24% each), Sveriges Annonörer (advertisers), Sveriges Mediebyråer (agencies)
	Staff: 24
	Currency study funding: Through members and data licensees
	Turnover: 68.6 million SEK (9.8 million CHF, 2015)(190)
	Additional products / services: Events[<i>HA: Anlässe</i>] for interested professional audience
	Website: www.mms.se
Currency:	Name: No specific name for TV data
	Execution: Nielsen (TV) (90 staff in Sweden), comScore (Web/streaming)
	First Survey: 1992
	Type of survey: Electronic measuring devices (in the panelist's home) for TV and mobile devices
	Current developments: From June 2017: Total Video Measurement (TV + advertising-based video-on-demand), TNS Kantar Sifo internet panel is maintained

Swedish Radio Currency		
Leading Organisation:	Name:	No in-house name; clients' steering committee
	Organisational form:	MOC
	Year founded:	1969 (predecessor organisation), 1993
	Clients:	Sveriges Radio (public), MTG Radio and Bauer Media
	Staff:	No in-house operational activity
	Currency study funding:	Through members and data licensees
	Turnover:	turnover TNS Kantar Sifo, radio: 68,6 million SEK (9.8 million CHF, 2015); entire company: 446.6 million SEK (50.4 million CHF)(191)
	Additional products / services:	None
	Website:	https://tns-sifo.se/rapporter-undersokningar/radiundersokningar
Currency:	Name:	TNS SIFO Radiundersökningar (Radio result national radio; radio result local radio)
	Execution:	TNS Kantar Sifo
	First survey:	1992, since 2012: PPM
	Type of survey:	National networks: electronic measuring procedure (PPM, watermarking), server-side measurement Local stations: interview (CATI) with check as to online usage

Swedish Print Currency		
Leading Organisation:	Name:	TNS Kantar Sifo
	Organisational form:	OS
	Year founded:	1954 (Swedish Institute of Public Opinion Research (SIFO)), 2000 (sold to Research International), 2009 (TNS Kantar SIFO)
	Staff:	234 (entire company)
	Currency study funding:	Through customers
	Turnover:	446.6 million SEK (50.4 million CHF, entire company)(192)
	Additional products / services:	All market research services ORVESTO: a group study on various issues, including consumers, business, internet
Currency:	Name:	ORVESTO Konsument
	Execution:	In-house
	First survey:	1969 (1994 for print, TV, radio)
	Type of survey:	Survey
	Website:	http://tns-sifo.se/rappporter-undersokningar/rackviddsmatningar/orvesto-konsument

Swedish Online Currency		
Leading Organisation:	Name:	Sveriges Annonörer AB (Advertisers of Sweden)
	Organisational form:	JIC (TRCC), AG
	Year founded:	2002
	Members:	Sveriges Annonörer, Sveriges Mediebyråer (agencies), TU (Tidningsutgivarna, newspaper publishers)
	Staff:	2 (Sveriges Annonörer: 13)
	Currency study funding:	Through participants fee, dependent on access figures
	Turnover:	30.5 million SEK (3.4 million CHF, entire association, 2015)(193)
	Additional products / services:	None
	Website:	www.kiaindex.se
Currency:	Name:	KIA-Index (Kommittén för Internetannonsering)
	Execution:	Various, amongst them TNS Kantar Sifo
	First survey:	2002
	Type of survey:	Census data (full survey)
	Current developments:	Target: integrating demographic data The KIA Index is controversial.

4.2.5 Norway

Population: 5.2 million

Land Area: 385,199 km²

Official Languages: Norwegian (Bokmål and Nynorsk)

Regulation	
Regulator:	Medietilsynet (media authority)
Responsible for:	Radio, TV, Print, internet
Organisational form:	Ministry of Culture department
Website:	www.medietilsynet.no
Relationship with currency organisation:	No supervisory mandate over currency research

Norwegian TV Currency	
Leading Organisation:	Name: No official name (Norwegian steering committee for TV usage survey)
	Organisational form: MOC
	Year founded: 1992 (92-99: Ipsos MMI, 2000-2023 Kantar TNS, option until 2028)
	Members: NRK (public), TV 2, MTG and Discovery Networks Norway
	Staff: No in-house operational activity
	Currency study funding: Through participants and data licensees
	Turnover/costs: No information available
	Website: www.tns-gallup.no/vare-paneler
Currency:	Name: Kantar TNS TV-undersøkelsen
	Execution: Kantar TNS
	First survey: 1992, ab 2006/7 PPM
	Type of survey: Electronic measuring device (in the panellist's home and Personal Peoplemeter for radio and TV)
	Current developments: New system from 2018 for a TV and video rating (called TVOV). Two panels, existing and new for consumption outside the home via measuring device (GallupGO); but: separate measurement of TV and video, no official cross-media plan

Norwegian Radio Currency		
Leading Organisation:	Name:	No official name (Norwegian steering committee for radio usage survey)
	Organisational form:	MOC
	Year founded:	1991
	Clients:	NRK (public), MTG, Bauer Media
	Staff:	No in-house operational activity (In Norway, Kantar TNS employs 129 staff, of which 40 in currency research)
	Currency study funding:	Through clients and data licensees
	Turnover/costs:	No information available
	Website:	www.tns-gallup.no/vare-paneler
Currency:	Name:	Kantar TNS radio-undersøkelsen
	Execution:	Kantar TNS with Nielsen
	First survey:	1991 (1991-95 Synovate MMI, from 1995 Kantar TNS, from 2007 measurement)
	Type of survey:	Portable electronic measuring device, with smaller stations via interview (CATI)

Norwegian Print Currency		
Leading Organisation:	Name:	No in-house name (see Clients)
	Organisational form:	MOC
	Year founded:	1988
	Clients:	Mediebedriftenes Landsforening (MBL, media association)
	Staff:	No in-house operational activity
	Currency study funding:	Through the participating data licensees and data sales to media agencies
	Turnover/costs:	No information available
	Website:	www.tns-gallup.no/medier/avis
Currency:	Name:	Kantar TNS Forbruker & Media (F&M)
	Execution:	Kantar TNS
	First survey:	1988
	Type of survey:	Survey (CATI)
	Current developments:	Planned for 2018: Total Audience Study (printed & digital) instead of F&M & NIP (internet), but continued publication in F&M (Consumer & Media) survey; online data are matched with comScore data; data merger survey and measurement

Norwegian Online Currency		
Leading Organisation:	Name:	No in-house name (see Clients)
	Organisational form:	MOC
	Year founded:	1996
	Clients:	Mediebedriftenes Landsforening (MBL, media association)/Nettforum
	Staff:	No in-house operational activity
	Currency study funding:	Through clients and data licensees
	Turnover:	No information available
	Additional products / services:	None
	Website:	http://www.mediebedriftene.no
Currency:	Name:	TNS Metrix (Norsk InternettPanel (NIP))
	Execution:	comScore, Kantar TNS
	First survey:	1996 (since 2015 comScore)
	Type of survey:	Full survey with Norsk InternettPanel (NIP)
	Information:	TNS Scores, additional surveys
	Current developments:	To be redesigned in 2018; comScore planning to apply comScore MMX-MP
	Website:	www.tns-gallup.no/medier/internett

4.2.6. United Kingdom

Population: 65.1 million

Land Area: 248,528 km²

Official Language: English

Regulation	
Regulator:	Office of Communications (OFCOM)
Responsible for:	Radio, TV, internet
Organisational form:	Independent authority
Website:	www.ofcom.org.uk
Relationship with currency organisation:	No supervisory mandate over currency research
Information:	From April 2017 supervision brief includes the BBC

British TV Currency	
Leading Organisation:	Name: Broadcasters' Audience Research Board (BARB)
	Organisational form: Limited company (Ltd.), JIC
	Year founded: 1981
	Shareholders: BBC, ITV, Channel 4, Channel 5, Sky, UKTV, IPA (Institute of Practitioners in Advertising)
	Staff: 10
	Currency study funding: Through members and data licensees, sales also through reseller
	Turnover/costs: No information available
	Additional products / services: Courses on data use
	Website: www.barb.co.uk
Currency:	Name: BARB
	Execution: Kantar Media, RSMB (method), Ipsos MORI, Nielsen (Project Dovetail only)
	First survey: 1981
	Type of survey: Electronic measuring device (in the panellist's home) and VirtualMeter for PC/mobile devices
	Current developments: Project Dovetail Fusion cross-screen measurement: identification of total reach of video use; traditional panel + full survey (web content). The tender for a new measuring device with internet-based ability to measure across the entire household (TV + mobile devices) was won by Kantar in late February 2017.

British Radio Currency		
Leading org.:	Name:	Radio Joint Audience Research Limited (RAJAR)
	Organisational form:	Limited company (Ltd.), JIC
	Year founded:	1992
	Shareholders:	BBC, RadioCentre (private radio association),
	Other partners:	IPA
	Staff:	10
	Currency study funding:	Through members and data licensees
	Turnover/costs:	No information available
	Additional products / services:	Regular courses, including tailor-made
	Website:	www.rajar.co.uk
Currency:	Name:	RAJAR
	Execution:	RSMB, Ipsos MORI
	First survey:	1992
	Type of survey:	Digital diary (online, app)
	Additional information:	Measurement was tested a few years ago and discarded as too expensive, flawed and complicated for UK market structure (with approx. 500 geographical areas).

British Print Currency (national)			
Leading Organisation:	Name:	The Publishers Audience Measurement Company (PAMCo)	
	Organisational form:	Limited (Ltd.), JIC	
	Year founded:	2016 (predecessor NRS: 1956)	
	Shareholders:	News Media Association (NMA), Professional Publishers Association (PPA, magazines), IPA	
	Staff:	8	
	Currency study funding:	Through members and data licensees	
	Turnover/costs:	No information available	
	Website:	www.ampdata.co.uk / www.nrs.co.uk	
	Currency:	Name:	Audience Measurement for Publishers (AMP) / National Readership Survey (NRS)
		Execution:	Ipsos MORI, comScore
First survey:		1956	
Type of survey:		Survey (DS-CAPI) and measurement for digital content	
Additional information:	In late 2017/early 2018 AMP will become the new survey, until then the old NRS remains in place.		

British Print Currency (regional)		
Leading Organisation:	Name:	JICREG
	Organisational form:	Limited (Ltd.), JIC
	Year founded:	1990
	Shareholders:	News Media Association (NMA), Professional Publishers Association (PPA, magazines), IPA
	Staff:	2
	Currency study funding:	Through members and data licensees
	Turnover/costs:	No information available
	Website:	www.jicreg.co.uk
Currency:	Name:	JICREG
	Execution:	see British print currency (national)
	First survey:	1990
	Type of survey:	Since 2013 integrated into AMP/NRS
	Current developments:	A system update is planned

British Online Currency		
Leading Organisation:	Name:	United Kingdom Online Measurement (UKOM)
	Organisational form:	Limited (Ltd.)
	Year founded:	2009
	Shareholders:	Association of Online Publishers (AOP), Internet Advertising Bureau (IAB)
	Other partners:	IPA, Incorporated Society of British Advertisers (ISBA)
	Staff:	6
	Currency study funding:	12.5% levy on all comScore products authorised by UKOM
	Turnover/costs:	No information available
	Additional products / services:	UKOM does not provide anything; comScore offers all products for sale in UK
	Website:	www.ukom.uk.net
Currency:	Name:	comScore MMX-MP
	Execution:	comScore
	First Survey:	1992
	Type of survey:	Unified Digital Measurement (UDM): full survey with panel across all devices

British Convergent Consumer Study		
Leading Organisation:	Name:	IPA
	Organisational form:	Association of advertising and marketing representatives
	Year founded:	1917
	Categories covered:	TV, radio, print, outdoor, cinema, internet, individual events and sponsors, direct marketing, mouth-to-mouth publicity
	Funding:	Data sales
	Turnover/costs:	No information available
	Website:	www.ipa.co.uk/touchpoints
Currency:	Name:	IPA Touchpoints
	Execution:	Ipsos Connect, comScore (digital data)
	First survey:	2006
	Type of survey:	Questionnaire and online diary

4.2.7 Ireland

Population: 4.8 million

Land Area: 70,273 km²

Official Languages: Irish, English

Regulation	
Regulator for non-technical aspects:	Broadcasting Authority of Ireland (BAI)
Responsible for:	Radio and TV
Organisational form:	Independent organisation, financed through a levy from the networks
Website:	www.bai.ie
Relationship with the currency organisation:	No supervisory mandate over TAM Ireland, member of the JNLR management committee
Regulator for technical aspects:	Commission for Communications Regulation (ComReg)
Organisational form:	Independent and autonomous organisation
Website:	www.comreg.ie

Irish TV Currency	
Leading Organisation:	Name: TAM Ireland
	Organisational form: JIC, non-profit Ltd
	Founding year: 2007
	Members: RTÉ, TV3, UTV, Channel 4, Sky Ireland, Viacom, Eir Sport, TG4, advertising agencies
	Staff: CEO (+1 consultant)
	Currency study funding: Through members and data licensees
	Turnover/costs: No information available
	Additional products /services: None
	Website: www.tamireland.ie
Currency:	Name: TAM Ireland
	Execution: Nielsen (since 1996)
	First survey: 1996
	Type of survey: Electronic measuring device (in the panellist's home)
	Current developments: VISTA (Video Integration Strategy for a Total Audience); tests for various video streaming measurement providers

Irish Radio Currency		
Leading Organisation:	Name:	Joint National Listenership Research Committee, JNLR
	Organisational form:	Quasi JIC, simple company
	Year founded:	1989 (when private radio was licensed)
	Members:	RTÉ, Today FM, Independent Broadcasters of Ireland, BAI (regulator), IAPI (agency association), AAI (advertisers' association)
	Staff:	No in-house operational activity
	Currency study funding:	Only through the radio sector members
	Turnover/costs:	No information available
	Additional products / services:	None
	Website:	http://info.ipsosmrbi.com/jnlr
Currency:	Name:	JNLR/Ipsos MRBI
	Execution:	Ipsos MRBI, Espri DMC
	First survey:	1989
	Type of survey:	Face-to-face survey (approx. 16,800 respondents)

Irish Print Currency		
Leading Organisation:	Name:	Joint National Readership (JNRS)
	Organisational form:	JIC
	Year founded:	1972
	Members:	NewsBrands Ireland (newspaper association), AAI (advertisers' association), IAPI (agencies' association)
	Staff:	None
	Currency study funding:	Through the associations and data licensees
	Turnover/costs:	No information available
	Additional products / services:	None
	Website:	http://newsbrandsireland.ie/data-centre/readership/
Currency:	Name:	JNRS
	Execution:	Kantar Millward Brown, Partner: comScore (online data)
	First survey:	1972
	Type of survey:	Survey
	Current developments:	Relaunch of JNRS (integration of digital readership), data/Total Reach Figure for end of 2017 (from then on bi-annually)
	Additional information:	Data only collected on the NewsBrand Ireland association brands, currently 16 titles (print & online). Open to other online media, including RTÉ.ie.

Irish Online Currency		
Leading Organisation:	Info:	No in-house currency organisation
De facto currency:	Name:	comScoreMMX-MP
	Execution:	comScore
	First survey:	2005
	Type of survey:	Unified Digital Measurement (UDM): full survey with panel across all devices
	Information:	comScore is currently engaged in setting up an online JIC

4.3 North/South America

4.3.1. USA

Population: 322.8 million

Land Area: 9,826,675 km²

Official Language: English

Regulation	
Regulator:	Federal Communications Commission (FCC)
Responsible for:	Radio, TV, internet
Organisational form:	Independent federal agency
Website:	www.fcc.gov
Relationship with currency organisation:	No supervisory function over currency organisation

NB:	For anti-trust reasons, JICs are banned in the USA. The Media Rating Council certifies the investigations on a voluntary basis as a self-regulating organisation. The MRC was founded in the 1960s at the instigation of Congress instead of a state regulator for media research.
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US TV Currency	
Leading Organisation:	Name: Nielsen
	Organisational form: OS, AG
	Year founded: 1923
	Staff: 9,301 (USA, 2015, entire company)
	Currency study funding: Data sale
	Turnover/costs: Entire company \$2.8 billion worldwide in the 'watch' sector(194)
	Other products / services: Complete range of market research services
	Website: www.nielsen.com/us/en/solutions/measurement/television.html
Currency:	Name: Nielsen TV Ratings
	Execution: In-house
	First survey: 1950
	Type of survey: Electronic measurement devices (in the panellist's home) in the 56 biggest of 210 markets; in the remainder: diaries. Since 2017 now also by Personal Peplemeters for outside-the-home use.
	Additional information: Services two markets: national TV market and 210 individual local TV markets

US Radio Currency		
Leading Organisation:	Name:	Nielsen (see TV currency)
Currency:	Name:	Nielsen Audio; 'Syndicated Radio Rating Service'
	Execution:	In-house
	First survey:	1936 (in 2013 Arbitron, leader in listener research was taken over)
	Type of survey:	In the 48 major markets by Portable Peoplemeter (PPM); in the remainder: diaries
	Website:	www.nielsen.com/us/en/solutions/capabilities/audio.html

US Print Currency 1		
Leading Organisation:	Name:	GfK Mediamark Research & Intelligence (MRI)
Currency:	Organisational form:	OS, LLC
	Currency study funding:	By sale to clients: media, agencies, advertisers
	Costs:	No information available
	Additional products / services:	Further market research services
	Website:	www.gfkmri.com
Currency:	Name:	Survey of the American Consumer, GfK Mediamark Research & Intelligence (MRI)
	Execution:	GfK MRI
	Type of survey:	Face-to-face survey (26,000 interviews; survey on digital use)
	Information:	Interviews gather information on media and consumer behaviour, attitudes and demographics

US Print Currency 2		
Leading Organisation:	Name:	Nielsen (see TV Currency)
Currency:	Name:	Nielsen Scarborough
	Execution:	In-house
	First survey:	1987
	Type of survey:	Measuring method dependent on market: survey (via telephone or internet) or diary
	Website:	www.scarborough.com/services/measurements/media
	Additional information:	Part of a consumer study for local markets with national and cross-media elements

US Online Currency 1		
Leading Organisation:	Name:	comScore
	Organisational form:	OS
	Year founded:	1999
	Staff:	Around 1,000 in the USA, 1,800+ worldwide
	Currency study funding:	Data licensees
	Turnover:	Entire company approx. \$400 million worldwide (2015)
	Additional products / services:	Cross-platform measurements of brands & consumer behaviour
	Website:	www.comscore.com/
Currency:	Name:	comScore MMX-MP
	Execution:	In-house
	First survey:	2000
	Type of survey:	Unified Digital Measurement (UDM): full survey with panel across all devices

US Online Currency 2		
Leading Organisation:	Name:	Nielsen (see TV currency)
Currency:	Name:	Nielsen Digital Audience Measurement (previously: Nielsen Netratings)
	Execution:	In-house
	First survey:	2000
	Type of survey:	Full survey with panel
	Website:	http://www.nielsen.com/us/en/solutions/measurement/online.html
	Additional products / services:	Other products such as digital ad ratings
	Additional information:	Part of a consumer study for local markets with national and cross-media elements

US Convergence Studies		
	Information:	In the USA various providers offer different convergence studies, e.g.
Leading Organisation:	Name:	- Nielsen & GfK MRI: Net//MRI: merger of Nielsen data and GfK MRI's Survey of the American Consumer - comScore: XMedia (since 2015, developed in collaboration with CIMM): Total Audience Measurement: TV, digital TV, internet, target: daily publication of data

4.3.2. Canada

Population: 36.3 million

Land Area: 9,984,670 km²

Official Languages: English, French

Regulation	
Regulator:	Canadian Radio-Television and Telecommunications Commission (CRTC)
Responsible for:	Radio, TV
Organisational form:	Authority in the Department for Canadian Heritage
Website:	www.crtc.gc.ca
Relationship with currency organisation:	Supervisory mandate
Information:	Strong regulation to shield Canadian media companies from US corporations. Since 2014, there has been an ongoing discussion between CRTC and the population/ the media, in the shape of 'Let's Talk TV'. CRTC decided to deploy a working group on the use of data gathered via customers' set-top boxes.

Canadian TV Currency		
Leading Organisation:	Name:	Numeris
	Organisational form:	Non-profit TRCC
	Year founded:	1944
	Management:	External: Board of Directors consisting of representatives of the members Internal: executive team
	Members/participants:	Over 1250 media companies, agencies, advertisers
	Staff:	Full time: 250 / part time: over 500 (entire company)
	Currency study funding:	Through membership contributions and data licensees
	Turnover/costs:	No information available
	Additional products / services:	Numerous reports with user data plus data around radio/TV content (e.g. changes of format at radio stations)
	Website:	www.numeris.ca
Currency:	Name:	Numeris (no specific name for TV data)
	Execution:	Numeris in collaboration with Kantar for processing, Nielsen (with PPM only).
	First survey:	1952
	Type of survey:	Nationally and in the 6 major markets: Personal Peplemeter for radio and TV; in the remaining markets: diary for radio and TV
	Current developments:	- Attempt to merge set-top-box user data (return-path data, RPD) and Numeris data - Integration of the measurement of internet-based video use, evaluation in progress
	Additional information:	Cross-media content is provided for radio and TV

Canadian Radio Currency		
Leading Organisation:	Name:	Numeris (see TV currency)
Currency:	Name:	Numeris (no specific name for radio data)
	Execution:	Numeris in collaboration with Kantar for the processing, and Nielsen (only with the PPM).
	First survey:	1944
	Type of survey:	Nationally and in the 6 major markets: Personal Peoplemeter measures radio and TV. Other markets: diary for radio and TV
	Additional information:	Cross-media content available for radio and TV

Canadian Print Currency		
Leading Organisation:	Name:	Vividata
	Organisational form:	Non-profit TRCC
	Year founded:	2014 (Product of a merger between two previously existing print research firms (NADbank and PMB))
	Members:	Board of Directors: representatives from the media, agencies, advertising sector Members: over 500 from the media/advertising sector
	Staff:	13 (March 2017)
	Currency study funding:	Through membership fees and data licenses
	Turnover/costs:	No information available
	Additional products / services:	Vividata Online Media School (interactive modules, including on media planning and sampling theory)
	Website:	www.vividata.ca
Currency:	Name:	Vividata
	Execution:	Nielsen
	First Survey:	2015
	Type of survey:	Survey (CATI/CAWI); cross-platform survey of print and digital use across all devices
	Additional information:	Survey of over 70 magazine/newspaper titles – national and across 50 Canadian markets; survey incl. questions on demographics, consumer habits, general media use (also of other categories), etc.

Canadian Online Currency		
Leading Organisation:	Info:	No in-house currency organisation
Currency:	Name:	comScore MMX-MP
	Execution:	comScore
	First survey:	2014
	Type of survey:	Unified Digital Measurement (UDM): full survey with panel across all devices
	Information:	Further competitors of comScore on the market, but comScore is the de facto currency

4.3.3. Brazil

Population: 207 million

Land Area: 8,515,770 km²

Official Language: Portuguese

Regulation	
Regulator for content and legal/contractual issues:	Ministry of Science, Technology, Innovation and Communications (MCTIC)
Responsible for:	Radio, TV, internet
Organisational form:	Ministry
Website:	www.mctic.gov.br
Regulator for technical issues:	Anatel – National Telecommunications Agency
Responsible for:	Radio, TV, Internet
Organisational form:	Independent authority
Website:	www.anatel.gov.br

Brazilian TV Currency 1	
Leading Organisation:	Name: Kantar IBOPE Media
	Organisational form: OS
	Year founded: 1942 (Ibope = Brazilian Institute of Public Opinion and Statistics)
	Staff: 3,500 in 17 South American countries
	Currency study funding: Data licensees
	Turnover/costs: No information available
	Additional products / services: Further studies and data on various categories available, e.g. Kantar Twitter TV Ratings
	Website: www.kantaribopemedia.com
Currency:	Name: Audiência TV 15 Mercados
	Execution: In-house
	First Survey: 1951
	Type of Survey: Electronic measurement device (in the panellist's home) with real-time measurement since 1988 Total Video TVOV (Peplemeter with panel, Focalmeter for tablets, phones, PCs)
	Audit Control: Between 1998 and around 2014 IBOPE was controlled by EY following MRC guidelines, paid by ABAP (Brazilian agency federation). This stopped in 2014 because of supposed discussions about funding and fear of espionage through the new competitor GfK; the GfK figures were now the 'auditor' in the words of the IBOPE president(195)

Brazilian TV Currency 2		
Leading Organisation:	Name:	No proper name (see Clients)
	Organisational form:	MOC
	Year founded:	2015
	Clients:	TV networks: Band TV, Record, RedeTV!, SBT, TV Cultura
	Staff:	400 (all of Brazil)
	Currency study funding:	Through clients and data licensing sales
	Turnover/costs:	No information available
	Additional products / services:	None
	Website:	http://www.gfk.com/pt-br/
Currency:	Name:	GfK
	Execution:	GfK (& Nielsen)
	First survey:	2015
	Type of survey:	PPM, panel, real-time measuring
	Current developments:	Introduction of a cross-media TV/online audience measurement

Brazilian Radio Currency		
Leading Organisation:	Name:	Kantar IBOPE Media (see TV currency 1)
	Website:	www.kantaribopemedia.com
Currency:	Name:	Easymedia4
	Execution:	In-house
	First survey:	1942
	Type of Survey:	Survey (in person, over the telephone, online)
	Information:	Complementary service for radio stations: TagWave: Web analytics, monitoring of online radio use and streaming

Brazilian Print Currency		
Leading Organisation:	Name:	Ipsos Brasil (previously: Ipsos Marplan)
	Organisational form:	OS, Ltda.
	Year founded:	1997 (Brazil), 2001 (merger with Marplan) 1975 (company founded in France)
	Staff:	700 in Brazil; 15,000 worldwide
	Currency study funding:	Through clients/data licensees
	Turnover/costs:	No information available
	Additional products / services:	Market research & consulting
	Website:	www.ipsos.com.br
Currency:	Name:	Estudo Geral de Meios, EGM (previously: Estudos Marplan EGM)
	Execution:	In-house
	First survey:	1960 (by Marplan), 2014: pilot project online use
	Type of Survey:	Face-to-face interview (survey) with approx. 30,000 respondents
	Information:	- EGM is a market and consumer study also collecting data on print reach - 2015 project Métrica Única de Audiência dos Jornais: data merger EGM, comScore MMX, IVC, failed 2016
	Additional information:	Consumer study Target Group Index (TGI) has been conducted since 1999 in Brazil

Brazilian Online Currency		
Leading Organisation:	Name:	Absence of own currency organisation comScore's product is considered the de facto currency in Brazil
De facto currency:	Name:	comScore MMX-MP
	Execution:	comScore
	Type of Survey:	Unified Digital Measurement (UDM): full survey with panel on all devices
	Information:	Acquisition of Certifica (Latin-American online measurement firm) Since 2016 cooperation with Kantar Media: cross-platform service: merger of the data of comScore MMX and Kantar TGI Clickstream

4.4. Africa, Asia, Oceania

4.4.1. South Africa

Population: 56 million

Land Area: 1,219,912 km²

Official Languages: Afrikaans, English, Southern Ndebele, Xhosa, Zulu, Northern Sotho, Sesotho,

Setswana, Siswati, Tshivenda, Xitsonga, 11 languages

Regulation	
Regulator:	The Independent Communications Authority of South Africa (ICASA)
Responsible for:	Radio, TV, internet
Organisational form:	Independent authority
Website:	www.icasa.org.za
Relationship with currency organisation:	No supervisory mandate over currency research

South African TV Currency	
Leading Organisation:	Broadcast Research Council of South Africa (BRC)
Organisational form:	MOC, non-profit organisation
Year founded:	2015
Members:	National Association of Broadcasters (NAB)
Staff:	3 (for R & TV)
Currency study funding:	Levy system (1% of advertising sales), networks and data licensees
Costs:	70 million ZAR (5.4 million CHF)
Website:	www.brca.org.za/#TV
Currency:	Name: TAMS (TAM South Africa)
	Execution: Nielsen (since 1989)
	Type of survey: Electronic measuring device (in the panellist's home)

South African Radio Currency	
Leading Organisation:	Broadcast Research Council of South Africa (BRC)
Organisational form:	MOC, non-profit organisation
Year of foundation:	2015
Members:	National Association of Broadcasters (NAB)
Staff:	3 (for R & TV)
Research study funding:	Levy system (1% of advertising revenue), stations and data licensees
Costs:	25 million ZAR (ca. 1.95 million CHF)
Website:	www.brca.org.za/#radio
Currency:	Name: RAMS
	Execution: TNS
	Type of survey: Diary

South African Print Currency		
Leading Organisation:	Name:	Publisher Research Council (PRC)
	Organisational form:	JIC, non-profit society
	Year founded:	2016
	Members:	Most important publishers in South Africa
	Staff:	1
	Currency study funding:	PRC (levy on advertising revenue)
	Turnover/costs:	No information available
	Additional products / services:	None
	Website:	www.prc.za.com
Currency:	Name:	Publisher Audience Measurement Survey (PAMS)
	Execution:	Nielsen
	First survey:	2017
	Type of survey:	Face-to-face interviews
	Current developments:	First edition of the new readership study to be published in the third quarter of 2017.
South African Online Currency		
Leading Organisation:	Name:	Internet Advertising Bureau South Africa (IAB SA)
	Organisational form:	JIC (TRCC), non-profit society
	Year of foundation:	2014 (previously Digital Media and Marketing Association (DMMA))
	Members:	IAB SA (association of over 200 members from the digital and advertising sector)
	Staff:	2
	Currency study funding:	Through members and data licensees
	Turnover/costs:	No information available
	Website:	www.iabsa.net
Currency:	Name:	Effective Measure
	Execution:	Effective Measure
	First survey:	2011
	Type of survey:	Full survey plus interviews
South African Convergent Study		
Currency:	Name:	Establishment Survey (planned)
	Categories covered:	TV, radio, print, internet
	Members:	Broadcast Research Council of South Africa (BRC) Publisher Research Council (PRC)
	First survey:	2017
	Type of survey:	Data Hub
	Funding:	Associations; levy on advertising sales

4.4.2. South Korea

Population: 51.5 million

Land Area: 100,284 km

Language: Korean

Regulation	
Regulator:	Daehanminguk Bangsongtongsin Wiwonhoe
English name:	Korea Communications Commission (KCC)
Responsible for:	Radio, TV, internet
Organisational form:	Administrative organisation at ministerial level
Website:	http://eng.kcc.go.kr/user/ehpMain.do
Information:	Highly regulated, in particular the radio and TV frequencies, due to the proximity to North Korea.

South Korean TV Currency 1	
Leading Organisation:	Name: Nielsen Korea
	Organisational form: OS, AG
	Year founded: 1992 as MSK, in 1999 taken over by Nielsen
	Staff: No information available
	Currency study funding: Through customers
	Turnover/costs: No information available
	Additional products / services: N-Screen: capture of usage data in TV, on PC and smartphones, with the option of customised modules. Internet use in collaboration with Nielsen Koreanclick.
	Website: www.nielsenkorea.co.kr
Currency:	Name: Nielsen TAM / N-Screen
	Execution: In-house
	First survey: 1992
	Type of survey: Electronic measuring device (in the 2,050 panel households) / For N-screen: app to capture PC or smartphone use
	Information: Popular in Korea is Digital Media Broadcasting (DMB), i.e. terrestrial TV specifically for DMB-enabled mobile devices

South Korean TV Currency 2		
Leading Organisation:	Name:	Total National Multimedia Statistics (TNmS)
	Organisational form:	AG
	Year founded:	1998
	Staff:	Approx. 80
	Currency study funding:	Through customers
	Turnover/costs:	No information available
	Additional products / services:	The 'MR Application' app tracks mobile media use (TV programmes in particular)
	Website:	http://www.tnmp.tv
Currency:	Name:	No separate name
	Execution:	In-house in collaboration with Kantar
	First survey:	1998
	Type of survey:	Electronic measuring device (in the panellist's home)

South Korean Radio Currency		
Leading Organisation:	Name:	Hankook Research Company
	Organisational form:	Ltd.
	Year founded:	1978
	Staff:	270 (entire company)
	Currency study funding:	Through customers/data licensees
	Turnover/costs:	KRW 62 million (55 million CHF, 2015, entire company)(196)
	Additional products / services:	Comprehensive market research and consultancy
	Website:	www.hrc.co.kr
Currency:	Name:	Metro Radio Study (MRS)
	Execution:	In-house
	First survey:	2009
	Type of survey:	Survey (CATI)

South Korean Print Currency		
Leading Organisation:	Name:	Hankook Research Company (see radio currency)
Currency:	Name:	HRC Media Index and TGI
	Execution:	In-house
	First survey:	1987 (TV ratings), 1988 (First print readership study and start of Media Index)
	Type of survey:	Face-to-face survey, part of a consumer study, radio is also integrated

South Korean Online Currency		
Leading Organisation:	Name:	Nielsen KoreanClick
	Organisational form:	OS, AG
	Year founded:	2000 KoreanClick (taken over by Nielsen in 2009)
	Staff:	No information available
	Currency study funding:	Through customers (sectors: e-commerce, media, advertisers...)
	Turnover/costs:	No information available
	Additional products / services:	Other products & consulting for internet/mobile/advertising slots
	Website:	www.koreanclick.com
Currency:	Name:	Nielsen KoreanClick
	Execution:	In-house
	First survey:	2000, 2012 (mobile)
	Type of survey:	Full survey with panel (PC only MS Windows, mobile only Android OS)

4.4.3. New Zealand

Population: 4.7 million

Land Area: 269,652 km²

Official Languages: English, Maori

Regulation	
Regulator:	Broadcasting Standards Authority (BSA)
Responsible for:	Radio and TV
Organisational form:	Independent Crown Entity,(197) pertaining to the Ministry of Culture and Heritage, responsibility residing with the Minister for Broadcasting
Website:	https://bsa.govt.nz
Relationship with currency organisation:	

New Zealand TV Currency	
Leading Organisation:	Name: No in-house name, see Clients
	Organisational form: MOC
	Year founded: 1975
	Clients: Think TV (TVNZ association (public) and MediaWorks TV (private)
	Staff: No in-house operational activity
	Currency study funding: Through clients and data licensees (majority paid for by the media)
	Turnover/costs: No information available
	Additional products / services: none
	Website: www.agbnielsen.net > New Zealand
Currency:	Name: Nielsen TAM
	Execution: Nielsen
	First survey: 1975, from 1990 onwards Peoplemeter
	Type of survey: Electronic measuring device (in the 500 panel households)
	Current developments: Current contract runs until 2018, with currency to be renewed
	Additional information: Data is gathered every 15 minutes, leading to advertising breaks lasting five minutes presumably showing exaggerated figures. The new contract is slated to change this.

New Zealand Radio Currency	
Leading Organisation:	Name: Research Committee of the Radio Broadcasters Association (RBA)
	Organisational form: MOC
	Staff: No in-house operational activity
	Currency study funding: Radio Broadcasters Association (RBA) = association of private radio; public network RNZ pays RBA pro-rata for its data (laid down in Memorandum of Understanding)
	Turnover/costs: 1-2 million NZD (0.7-1.5 million CHF)
	Additional products / services: None
	Website: www.gfk.com/en-nz/insights/report/radio-audience-measurement
Currency:	Name: GfK Radio Audience Measurement
	Execution: GfK (since 2016), previously TNS (1991-2015)
	First survey: 2016 (in new form)
	Type of survey: Diary (paper or online)
	Additional information: Since 2015/6, public broadcaster RNZ has been participating in measurement within the framework of a Memorandum, previously own occasional measurements
New Zealand Print Currency	
Leading Organisation:	Name: Nielsen
	Organisational form: plc, recommended by the sector(198)
	Staff: No information available
	Currency study funding: Through data licensees
	Turnover/costs: No information available
	Additional products / services: None
	Website: www.nielsen.com/nz/en.html
Currency:	Name: Nielsen Consumer and Media Insights (CMI)
	Execution: Nielsen
	First survey: 2011
	Type of survey: Interview (online-based), additional integration of user data from other categories in the annual edition.
New Zealand Online Currency	
	Information: There is no shared measurement, leading to criticism. Nielsen and comScore are both active in New Zealand's internet use research, with Nielsen boasting a stronger position in the market. Both companies entered the NZ market only recently.

5. Conclusion

5.1. Comparing currency research organisations – an international perspective

Currency research organisations, i.e. organisations conducting research into media use, whose results constitute a nationally valid **standard** (“currency”) for the advertising business, are of prime importance for developed media systems. In 2017, the global **advertising market** will reach a volume of more than 500 billion US dollars. Nearly a third of that is spent in the USA, but countries such as China, Brazil and Mexico are registering big increases too.(199) Therefore, currency organisations and their research findings contribute not only to the allocation of economically significant resources, but also determine the very existence of media companies and products. Their **relevance** is thus not only of an (advertising) economic nature, but indirectly bears a political dimension. First and foremost, however, the function of the currency organisations is to provide transparency for the advertisers in terms of the advertising media’s contact performance.

The current situation of currency research organisations is heavily shaped on one hand by developments in the **media markets**, and on the other by historic circumstances and the institutionalisation of the media systems in the various countries. As a general rule, in countries with strongly libertarian institutionalised media such as the USA and Brazil it seems to be harder to establish nationally recognised **currencies** – in the **USA** this is even **banned** through anti-trust laws. Then again, the institutionalisation of currencies may also hit difficulties in a country such as South Korea, where the boundaries between the media and (the rest of) the economic system are somewhat fluid, as the major industry conglomerates have their own media and advertising agencies. These interdependencies have led, amongst other things, to the South Korean state founding their own marketing agency for private and public broadcasters, to also allow smaller independent media access to advertising funds.

While the **currency organisations** for print media can usually look back on decades of experience, broadcast media only began to push the institutionalising of currencies in the second half of the last century. Particularly in countries with a strong tradition of public broadcasting, ‘**Joint Industry Committees**’ formed only after the entrance of private providers onto the market. Before that, identifying user figures in the radio and TV sector was the responsibility of the public broadcasters and their research departments. Often these were able to maintain their strong influence on the relevant currencies for a long time: in Switzerland, for example, it took until 2006 for the SRG research service to be converted into an independent organisation.

Until a few years ago, currency research all over the world was primarily **category research (“silo research”)**, i.e. there were currencies for print media, for radio, TV, online media and other advertising media. This was despite the fact that media users have always been orientated towards multi media. In individual countries (e.g. UK, USA) there have been and still exist even currencies for sub categories, e.g. magazines or regional media in contrast to nationally circulated media. However, this parallelisation yields an incomplete picture of the media consumer – particularly in an

age of digital convergence. From around the year 2010 onwards there are noticeably strong dynamics in the currency research sector. This is reflected, for example, in the **rebranding** of existing currency organisations (e.g. USA, France, Germany, UK) or in a complete **restructuring** (South Africa, Italy). Driving this development is the ever faster-changing media market, in particular the dominance of the internet as a distribution channel and the concomitant changes in media use.

In most cases, structural **reforms** and methodological **innovations** are triggered by pressure from outside, through demands from the advertising market in particular, and in individual cases (Italy) also through the regulatory authorities, while the organisations often show little will to change. This phenomenon, which may be observed at a global level, can be explained on the one hand by the fact that research currencies per se are designed towards duration and stability, in order to in fact guarantee a central criterium, **comparability**. Frequent changes run counter to this goal, as they always entail data discontinuity. On the other hand, more often than not there are strong special interests (e.g. particular media companies) behind the currency organisations, which are threatened with loss of influence or even economic loss through organisational or methodological innovations, especially as even a minimal re-channelling of the flow of funds may have existential consequences for individual players.

Therefore it should not come as a surprise that currency studies are prone to **manipulation**, with examples known from Austria and France. **Measuring errors**, manifesting themselves in the radio and TV sectors in particular, due to the complex technology, also continue to lead to discussions (Germany, Switzerland). Disputes surrounding currency organisations are hard fought, occasionally ending in court (e.g. Italy, South Korea). To date, these revolve mainly around the currency research in classic media, which is rather surprising. However, in all likelihood this will change fairly rapidly given the already noticeable major importance of the online advertising market, and the considerable potential for fraud and manipulation in the online advertising sector.

5.2. Organisational forms and funding

As a general rule, the currency research organisations are organised along the lines of the classic media categories, and in the shape of three **idealised** concepts: the JIC (Joint Industry Committee), MOC (Media Owned Committee) and OS (Owned Service). The **JIC** has representatives of all market players: the media companies and their associations, the advertising and media agencies and the advertisers. The **MOC** gathers together exclusively the media providers and associations, whereas an **OS** comes under the wing of the market research company that collects the audience data.

As shown by the investigation, in practice the boundaries between the different forms are **fluid**. A TRCC (Tripartite Research Company Contract), for instance, is an intermediate form between JIC and OS, where the research institute in charge of operations belongs to the JIC. The common denominator for the various types of currency organisation is the existence of a technical **committee** of sector players and

occasionally also external experts, which offers the research organisation consultancy support. The research organisation itself takes extremely different forms. There are two extreme **models**: the currency organisation, which basically consists merely of the technical committee, runs no office and outsources all operational tasks to market research institutes as a contractor (e.g. Denmark, Sweden, Norway), or the model of a currency organisation taking on the major part of the operational tasks themselves, even offering research and consultancy services going beyond currency research. Examples of this model would be Médiamétrie (France), but also the Swiss currency organisations Mediapulse and WEMF. Independently from the concrete design of the JICs and MOCs, they have very few of their own field and research capacities, but buy them in on the free market from external market research institutes. This can lead to the not entirely unproblematic situation in which a currency organisation is an important client and competitor in the market research sector at the same time.

The **legal form** chosen by the currency organisations differs from country to country. **Nearly all forms** are present, from simple enterprises with practically no legal footing to the stock-market listed corporation (Nielsen). In the main this is dependent on the organisation's size and conception. Thus, the British currency organisations, for instance, are constituted as public limited companies (plc), the Dutch as foundations and the German equivalents as associations. The JICs or MOCs are usually **non-profit organisations**, even if they are organised as a corporation (Inc., plc, Ltd.).

In most countries the currency organisations operate separately. However, diverse **forms of collaboration** have emerged. This development has been favoured by the digitalisation and shifting of media communication to the internet. As nearly all the classic media of print, radio and TV today are also online media, the existing currency organisations were forced to look at identifying internet use as well. In this context, there is no way to avoid coordinating efforts with the other currency organisations.

While the currency organisations are no longer really able to fulfil their tasks without **coordination** of their efforts, the centralisation of currency research with a single organisation is the exception rather than the rule. One of these exceptions is **Belgium**, where the **CIM** (Centre d'Information sur les Médias) as a JIC holds responsibility for all categories. In Norway, a single company as an OS has the lead responsibility for all categories, and Germany's agma represents a central umbrella organisation for the various currency organisations to operate under. The Netherlands show intense cooperation between the currency organisations. This cooperation encompasses not only methodological and technical aspects but also organisational aspects: the currency organisations, for instance, are housed in the same building as the media associations.

For all the diversity of organisational form and conceptions of the currency organisations, there are great differences in the **size of the organisation**. In the case of JICs or MOCs there is usually an office with a handful of staff. Even the Belgian CIM, responsible for all currencies, only employs ten staff. Most commonly, one committee will have between one to five people working for it. The major exception is **Médiamétrie**, with its 641 employees making it probably one of the largest research

companies in Europe. While the **Swiss** JICs WEMF and Mediapulse are far from reaching Médiamétrie's size, they do employ more personnel than most of the committees examined in the worldwide country selection.(200)

As regards the **costs** of currency research in the countries examined here, it is rare for a currency organisation to provide transparency. Very few publish an annual financial statement(201), and interview questions in that direction mostly go unanswered. While this reticence might be understandable with market research companies operating as OS, it is not really comprehensible why even the committees operating as non-profit organisations keep their business figures a secret. In the cases where figures on costs are available, these range between 1 million CHF (New Zealand radio currency study) and 11 million CHF (French print currency study).

In the main, currency research is **funded** from two **sources**: the contributions of the media companies as recompense for the participation of their brands in the surveys, and revenue from data sales and from licenses for data access. An interesting variant is practiced in **South Africa**. For many years currency research here has been financed through a voluntary **levy** paid by media companies on their advertising sales. This simple solution guarantees that all players contribute to the funding according to their financial means. Despite the breakdown of the old South African currency research system and the complete restructuring of the sector, this system has survived, demonstrating the broad consensus in this regard.

5.3. Relationship with the State

In the vast majority of cases the state fulfils **no functions** in connection with currency research. Rather, it is considered the task of the participating private and public players. While in Switzerland the state has the legal obligation to facilitate currency research in the radio and TV sectors and even supports financially the organisation in charge of the task, 15 of the 17 countries examined have no such legal mandate. Most of the (independent) regulatory authorities do have a research mandate, however this is not connected to the advertising media research, in some cases explicitly so (France), but rather comprises general issues of media use, effect and content.

It is only in **Italy** and **Canada** that the regulatory authority has a comparable mandate. The **Italian** regulator AGCOM, responsible for radio, TV and the internet, is obliged by law to lay down parameters and targets for currency research in the broadcasting sector, and to check for compliance. The relevant currency organisations have to report to AGCOM on a regular basis, and if errors or irregularities appear, AGCOM may request their correction or impose measures. In the case of the former radio currency organisation Auditel, AGCOM eventually ordered their dissolution, after the company failed to implement the requested improvements. In contrast to Switzerland, the Italian state does not however provide financial support to the currency research.

In **Canada**, the regulatory authority CRTC has a broad mandate, including the supervision of broadcasting currency research. The CRTC defines the targets and

parameters, and commissions – through a public tender process – the company chosen to guarantee the operational implementation of the currency research.

In **Ireland** it is worth mentioning the specific role of the broadcasting regulator BAI (Broadcasting Authority of Ireland) in radio currency organisation. A BAI representative sits on the management committee of the Joint National Listenership Research (JNLR). As a member of the management committee, the BAI is in charge of the co-supervision of central changes in the listener study, such as awarding the contract or methodological changes. This function is not, however, enshrined in law but has historical roots. As the BAI on occasion has a moderating effect on disagreements, this practice has proven fruitful for all players. In the TV currency sector, however, the BAI fulfils no such function.

Another particularity worth mentioning is the unusual function of the Media Rating Council (MRC) in the **USA**. This organisation was established by request of the US Congress in the 1960s as the answer to the problem of the – methodologically somewhat questionable – ‘parallel currencies’. Conceived as a self-regulating body of the broadcasting sector for the currency research, it is financed by the sector. The MRC ensures a facultative certification of the user research, thus replacing a national JIC, which for anti-trust reasons is not permitted in the USA.

5.4. Current Challenges and Perspectives

The major upheavals in the national landscapes of currency research started during the 2000s, as the **internet** conquered the world as a new ‘medium’ and fundamentally changed media usage. Today, all countries are striving to develop methods of taking into account current user habits. Particularly urgent issues include TV consumption on various digital platforms and time-delayed use. Many countries (e.g. Norway, UK, Ireland) are planning to introduce new methods and measuring procedures in 2017 and 2018. As this always brings about data discontinuities, the discussions are likely to carry on for a little while longer.

The biggest difficulty, however, will be in overcoming the historical category boundaries. In the past these have already proven an obstacle to establishing a currency research adequate to real user behaviour. Early attempts in many countries to conceive **cross-media** single-source surveys as national currencies bear witness to the communications sector’s discomfort with what are known as ‘silo solutions’. The fact that, with a few exceptions (e.g. South Africa), this kind of approach has almost never broken down the barriers is also due to the currency organisations deeming it more important to maintain their existing currencies, thus safeguarding continuity, rather than pushing innovation.

The first to have to react to the internet were the **print currency organisations**, when it became clear that the use of print content is increasingly shifting towards the internet. This happened mostly in coordination and cooperation with other providers of internet content through setting up online research systems, which initially ran alongside each other. A few years ago, when the bandwidths for data transmission were growing exponentially, a similar process began in the radio and TV sectors as

well, i.e. the **use of audio and video content** shifted ever faster online. This led to the currency organisations in the broadcasting sector also being forced to develop research systems taking into account these non-traditional ways of using media. It goes without saying that such a fragmentation of audience research cannot be in the interests of an advertising industry pushing for comparable data.

The other issue is that the internet now has new mighty players such as **Google** and **Facebook**, running their own research systems and refusing to work with the existing currency organisations.

The pressure towards **convergent currency research** has, however, become ever stronger. The currency organisations' reactions to this are in the main through strategic collaborations and convergence projects: in the Netherlands the currency organisations are getting closer physically and are considering a shared management. In Germany, currency research is grouped together under the agma roof, and in Austria and in Switzerland projects such as the Media Server and the Swiss Data Hub are being considered, with the plan of merging the data from all currency studies into a single convergent data pool.

There is another trend of great significance for the future of currency research: the **proliferation of technical measurement**. This has been evident since before the merger / data fusion projects. In TV research the trend has been happening for a long time. These days the triumphant march of electronic measuring systems is practically unstoppable, despite the regular occurrence of major problems in adapting the systems to new technologies and user habits (e.g. Simulcasting, time-delayed TV, etc.). In TV, technical measuring procedures have been standard for years, and they seem to be prevailing in the radio sector too. Online research went with technical measurements from the start, despite the results sometimes turning out very differently, depending on the system. Nor has the problem of manipulation and fraud in the online sector been solved, in fact far from it. However, it can only be a question of time before technical measuring procedures replace the surveys completely. The required technologies are extremely **complex**, however, with only a few companies having the relevant know-how, inevitably leading to a concentration of currency research. Today already the operational side of currency research for TV, radio and online is de facto dominated by four global firms: Kantar, Nielsen, GfK and comScore. While the executing institutes have to take into account the relevant national particularities and media structures, this **concentration** results to some degree in a worldwide standardisation of the measuring procedures, which may be a good thing, given the internationalisation of communications. This development does however also change the **duties of the national currency organisations**. The currency organisations in countries such as Denmark, Austria or South Africa are already limited to awarding contracts and monitoring the surveys. Operational functions are losing importance, with administrative, coordination and monitoring tasks becoming more important.

Whether the currency research organisations succeed in the **integration** demanded ever more vehemently by the market remains to be seen, with the participating organisations' different orientations and the massive methodological and technical

problems. Convergence studies are being planned in a number of countries and have already been conducted in a few, such as Sweden. South Africa too had a cross-media study until the collapse of its currency system in 2015. That integration is anything but easy, however, is shown by the example of Belgium. With the CIM as the only currency organisation responsible for all categories, the country really enjoyed optimal conditions, but as the CIM Crossmedia did not yield the desired reliable data, the study was temporarily suspended.

And there is further adversity ahead: the conception of advertising media vehicle research as practiced in currency research up to now always started from the assumption that advertising was placed in a particular context. However, on the internet this is less and less the case; rather, with what are known as **targeting strategies** the target group contacts are sold **independently from content**. While it has become clear recently that these strategies carry high risks, as the advertisers accept that their adverts might turn up in contexts damaging to their reputation,(202) it is highly unlikely that the clock will be turned back on the development towards targeting.

The trends outlined above suggest that the survival of currency research in its current form is **under challenge**. The internationalisation of communications works against national currency organisations. In the national framework, the concept of category-specific currencies (“silo currencies”) is obsolete, as the borders between categories are being dissolved. With this, the trend towards coordination and cooperation beyond the borders of category will (have to) become stronger. The logical consequence would be that not just the data but the organisations merge, as it difficult to understand why the categories should disappear, yet their organisations continue to exist. Another issue that remains entirely unclear is whether the current biggest players in the global advertising markets, Google and Facebook, will allow themselves to be integrated into the convergence projects. If these big players continue to remain apart, and should the trend towards targeting be maintained, the advertising business could lose interest in the currency research, which would pull the rug from under its feet entirely.

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Glossary/ List of Abbreviations

CAPI	Computer Assisted Personal Interview
CASI	Computer-Assisted Self Interview (interviewer present)
CATI	Computer Assisted Telephone Interview
CAWI	Computer Assisted Web Interviewing (interviewer not present)
GGTAM	Global Guidelines Television Audience Measurement, international guidelines for collecting data on TV use from 1999, with a 2008 update. Published by the EBU in collaboration with Audience Research Methods (ARM) Group and representatives from market research and advertising
IAB	Interactive Advertising Bureau, association of the advertising industry
JIC	Joint Industry Committee
MOC	Media Owned Committee or Media Owner Contract
OS	Research Company Own System
Peplemeter	Measuring device for use in front of the TV set
Personal or Portable Peplemeter (PPM)	A personal measuring device for audiovisual use
PPM	Personal or Portable Peplemeter
TAM	Television Audience Measurement
TGI	Target Group Index, Kantar's multiple-country consumer study
TRCC	Tripartite Research Company Contract, a subcategory of JIC