Netherlands - Media Landscape

Author(s): Piet Bakker

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Overview

At the beginning of this century, the Netherlands were a classic example of Democratic Corporatist model (Hallin & Mancini, 2004): A high circulation of newspapers and magazines, moderate TV viewing (compared to other countries), a dominant public broadcasting model that was protected by government and warm relations between political parties and dominant media.

In the last 15 years, this situation changed dramatically. Online media are now the most used media by the Dutch population, with Facebook leading the pack. Traditional TV watching has gone down in the past two years, while the use of ‘delayed’ watching and services like Netflix and YouTube has gone up. The Dutch still watched three hours of traditional TV every day in 2016.

Newspaper circulation and - consequently newspaper reading - is going down as far as printed newspapers are concerned. Nevertheless, newspaper readership is relatively high. In 2015, the percentage of the population aged 13 and older reading a printed newspaper every day, dropped below 50 percent for the first time.

Press concentration is high. In 2015 there were eight publishers left, the majority of newspapers being in foreign (Belgian) hands. In 2016 a new takeover was announced that will result in 80 percent of the total circulation of 3m newspapers (including free ones) owned by two Belgian publishers - De Persgroep and Mediahuis. Both publishers also dominate their home market.

Press-concentration has lead to waves of layoffs in print media. Budget cuts in public broadcasting has also resulted in fewer jobs for professional journalists.

The market for traditional print media in terms of copies sold is declining, also the position on the advertising market is weaker than before. But income from readers has increased over the years. Total revenue, however has declined because of the weak advertising market for newspapers. Publishers, however, still do make a healthy – two-digit – profit on printed newspapers.

TV - public and commercial broadcasting - takes a major part of advertising revenues. The printed press is losing its market share quite fast, newspapers now count for less than 20 percent of advertising revenues. The share of Google and Facebook in advertising, however, is a guess.

De-regulation is a major policy change: The fixed levels of press concentration have been dropped, government is more open to commercial broadcasting expansion - for instance in radio - and sets limits to the presence of public broadcasting online. The subsidies on public broadcasting have dropped in the last years. National and regional broadcasters have been forced to merge their operations.

The media market for is declining in terms of copies sold and the advertising market is also weaker than before. But income from readers has increased over the years. Regardless of the decline in total revenues because of the weak advertising market for newspapers, publishers still do make a healthy (two-digit) profit on printed newspapers.

Political parallelism has declined because of the professionalisation of the trade, of the changing political landscape (with less powerful traditional parties tied with broadcasters or printed media) and the rise of commercial broadcasting, with strong positions for RTL and SBS. A major part of printed and broadcast media are now in foreign hands.

Journalistic professionalism has increased over the last decades; the most challenging issues are commercialism and entrepreneurship as jobs in traditional media are not as available as they were twenty years ago. Almost every journalist in the Netherlands either went to a vocational Journalism School or studied at university.

State intervention in the media system in terms of censorship is lacking in the Netherlands; because of the country’s pillarised media system, the government usually avoids direct intervention. However, relaxing anti-cartel laws or budget cuts at public broadcasting also can have an effect on media performance.

1. Media

1.1 Print

The paid circulation of daily newspapers in the Netherlands dropped of more than 40 percent from 4.2m in 2000 to 2.5m in 2015. This is an average drop of 3 to 4 percent every year; in recent years the drop has been more than 5 percent every year. The latest available data on 2016 (first three quarters) show the same pattern.

The circulation is evenly divided between national and regional newspapers, 55 percent of the circulation is national, but this included the national/regional daily *Algemeen Dagblad* (*AD*) that consists of one national and seven regional editions. National newspapers tend to be distributed more in the western part of the country - including the major cities Amsterdam, Rotterdam, The Hague and Utrecht. Regional dailies are dominant in other parts.

As of 2016 there is just one free daily, *Metro*, left in the Netherlands. In 2006 and 2008 there were four national free dailies (*Metro*, *Spits*, *De Pers* and *DAG*) and some local ones. The circulation in these years was more than 1.8m. In 2015 *Metro* had a circulation of 430,000. Since 2012, *Metro* is owned by TMG (Telegraaf Mediagroep), also owner of the largest daily in the Netherlands, *De Telegraaf*. In 2017 the licence for published Metro has to be renewed or ended.

Total circulation of free newspapers took of with 450,000 in 1999 – equally divided between Metro and Spits that launched on the same day. Both titles increased their circulation until in 2007 the market exploded with two new national titles: DAG en De Pers. In 2009 circulation began to drop again after the closure of DAG and in 2012 again after De Pers stopped publication. Since 2015 Metro is the last remaining free daily.

The total circulation of all newspapers (paid and free) was 3.2m in 2015, in 2000 this was 5.1m, in 2007 it was even 5.7m. This number also includes the free circulation of paid newspapers, papers for staff members, advertisers, relations and marketing.

In 2005, Dutch newspapers begun for the first time to report ‘digital sales’, meaning the distribution of pdf-like papers that were separately bought - either through single sales or subscription - or sold together with a print subscription. The dominant model for this ‘combination-sale’ was a subscription to the weekend (Saturday) paper and the right to download the weekday-editions in a digital format.

In 2016 this digital circulation was 1m, a third of which was the sale of ‘pure’ digital-only papers, while the rest of the digital papers were sold in combination with printed copies. It should be noted, however, that digital revenues also can come from paywalls - which many Dutch newspapers introduced in the last years -, website advertising or apps. It is still safe to say that digital sales have not compensated newspapers for the loss of revenue from printed copies. In 2015 Publishers reported that only 4 percent of their revenues came from digital (NDP, 2016). Because this is an ‘average’ percentage, different publishers could perform differently. There are some indications - a high number of digital-only sales or a successful paywall - that newspapers targeting high-end users perform somewhat better in this respect.

In 2015, 48 percent of the Dutch population of 13 years and older read a newspaper on a daily basis - including free newspapers - and 44 percent read a paid newspaper. National newspapers (read by 27 percent) were slightly more popular than regional newspapers (read by 24 percent). Seven percent read free newspaper *Metro*. In 2004, 73 percent of the Dutch read a newspaper, 67 percent read a paid newspaper. In absolute numbers, the total readership dropped from 9.9m in 2004 to 6.8m in 2015.

The drop in circulation and readership - and therefore also in advertising - resulted in a drop in revenues, from €2bn in 2000 (when it was at its highest point) to €1.2bn in 2015. The revenue from readers, however, increased almost every year, the revenues from advertising dropped. In 2015, 75 percent came from readers, 22 from advertising and 3 percent from digital sources. In 2000 only 41 percent came for readers. It must be noted that in 2011 a new, more accurate method was used to calculate the origin of revenues, so data between the two periods cannot be compared. Digital revenues are still modest, not more than 4 percent in 2015.

Dutch newspaper publishers - or better: publishers of Dutch newspapers - do fairly well in terms of profits. The last five years they reported an average EBITDA of 15 percent.

In 2000 ten publishers were active on the Dutch market - coming down from 25 in 1980. Since then the number of publishers dropped slightly to eight in 2017 - but as TMG, the second publisher in the Netherlands, will probably be acquired by Belgian publisher Mediahuis, this number will drop to seven.

The Dutch newspaper market is highly concentrated. In 2015 - the last full year for which we have complete circulation data - Belgian publishers De Persgroep controlled 52 percent of the paid circulation, TMG 24 percent and the combination Mediahuis/Concentra 12 percent. The fourth publisher - regional combination NDC - controlled 7 percent. Four publishers controlled 95 percent of the market. When the TMG deal will materialize in 2017 the three largest publishers will control 95 percent. Belgian publishers De Persgroep and Mediahuis will control 88 percent of the Dutch paid circulation and 90 percent of the total circulation.

Between 1985 and 1997 the number of newspaper publishers sharpy declined from 24 to 10 – due to mergers, in particular in the field of regional and local newspapers. Since then the number has been rather stable althought it dropped to 9 in 2016.

The eight publishers of 2017 are:

- De Persgroep (national papers *AD*, *De Volkskrant* and *Trouw*; regional papers *De Gelderlander*, *De Stentor*, *Brabants Dagblad*, *TC Tubantia*, *BN De Stem*, *Eindhovens Dagblad*, *Het Parool* and *PZC*)
- TMG (national paper *De Telegraaf*; free daily *Metro* and regional dailies *Noordhollands Dagblad*, *Haarlems Dagblad*, *Leidsch Dagblad* and *De Gooi- en Eemlander*)
- Mediahuis (national papers *NRC Handelsblad* and *NRC•next* and regional paper *Dagblad De Limburger*)
- NDC (regional papers *Dagblad van het Noorden*, *Leeuwarder Courant* and *Friesch Dagblad*)
- Financial paper *Het Financieele Dagblad*
- National paper *Reformatorisch Dagblad* (Christian)
- National *Nederlands Dagblad* (Christian)
- Regional paper *Barneveldse Krant*

Cross media ownership has traditionally been restricted by law in the Netherlands, in particular when commercial TV and newspapers were concerned. Regulations are not that strict anymore but the combination between newspapers and commercial broadcasting is still weak. TMG had some stakes in commercial TV but now is only active in commercial radio, magazines and online media (apart from printed newspapers). De Persgroep owns commercial radio station*Q-music*. Financial paper *Het Financieele Dagblad* belongs to the same group as commercial radio station *BNR*.

Apart from daily newspapers, about 40 paid non-dailies are published, but only one has a circulation of more than 10,000. Free weeklies, however, are distributed in almost every community in the Netherlands. On average a household receives three free papers every week (Kik, Bakker, Buijs & Katz, 2012), 90 percent of the Dutch population of 13 years or older reads a free (weekly) paper now and then, more than 60 percent reads such a medium very week (NOM HAH-kranten Monitor, 2016).

There is no complete dataset on the distribution and readership of magazines in the Netherlands; most larger titles have their circulation and readership measured by NOM Printmedia because advertisers usually demand such audited data. A growing number of magazines, however, are not members of that organization.

The largest segments are Radio/TV magazines with a weekly circulation of 2.2m (13 titles), women's weekly magazines with 1.5 copies a week (six titles), glossy monthly magazines (1.25 copies a month, 19 titles), gossip weeklies (400,000 copies a week, four titles). All segments - except for glossies - have lost half of their circulation since 2000.

1.2 Radio

Two national radio stations compete on news, public broadcaster *Radio 1* and commercial station *BNR*. In the last years *Radio 1* had a market share of seven percent while *BNR* was stuck on 1 percent. The 13 combined regional stations also focus on news. They have a market share of more than 11 percent (2016), although the differences between regions are substantial, ranging from a market share of almost 30 percent in the north of the country to less than 10 in the central and western regions.

Radio in the Netherlands is mostly music radio. The most popular stations are commercial stations *Radio 538*, *Sky*, *Q-music* and *Veronica*, public broadcasters *3FM*, *ORN* (regional) and *Radio 2*. These stations - together with *Radio 1* - have market shares of five percent or more in the last years.

The total time spent on radio was between 2.5 and three hours a day in 2016 (www.rab.fm). Radio is usually listened to while doing something else (Media:tijd, 2015). When people listen to audio, 82 percent of the time (almost three hours) is spent on live radio, 15 minutes is spent on online music services and 21 minutes on playing one's own music (Audio Distributie Onderzoek, 2015).

1.3 Television

In 2016, 92.6 percent of the Dutch population of 6 years and older watched at least one minute of television. In 2015 this was 93.2 percent (SKO 2016 Report). In 2015 and 2016 the time spent on traditional TV dropped for the first time in ten years. In 2014 it was 200 minutes per day, in 2015 190 minutes and in 2016 183 minutes. This number included 'delayed' watching which has been going up since it was measured for the the first time in 2008 form 2 minutes to currently 13 minutes (SKO Yearly Reports). The data does not include watching services like Netflix (2.2 million subscribers in the Netherlands) or YouTube. Apart from Netflix there are two smaller services active in the Netherlands: *Videoland* (RTL) with 200,000 subscribers and *NLZiet* (public and commercial broadcaster) with 100,000 subscribers.

The traditional national market in the Netherlands is dominated by three groups, public broadcasting *NPO* (1, 2 and 3), *RTL* (4, 5, 7, 8, Z) and *SBS* (*SBS6*, *Net5*, *Veronica*, *SBS9*). Together these dozen channels have been responsible for more than 80 percent of the market share in the last 25 years.

The most popular programs in 2016 were soccer games - even when the Netherlands did not participate in the European Championship -, reality programs, the Eurovision Song Contest, Kings Day and game shows. When sport is excluded, the top ten of 2016 also included one daily 8 o'clock news show.

People increasingly watch TV on laptops, smartphones, iPads or computers. In 2005, 8 percent of the population said they did that, in 2014 44 percent answered yes to this question. Laptops and tablets were mentioned by a quarter of the respondents (SKO, 2015, TV in Nederland).

1.4 Digital Media

All newspapers and magazines, and all TV programs have websites and often apps (for tablets and smartphones) as well. Revenues are modest with 3 percent coming from digital. Most national newspapers introduced hard, soft of metered paywalls in the last years. As publishers of newspapers don't report on the numbers of subscribers or revenues of these models, nothing can be said about the success of these business models.

Until the spring of 2014 digital reach was measured for all media brands. Four media dominated: online-only platform *Nu.nl* (owned by magazine publisher Sanoma), popular newspaper platforms *Telegraaf.nl* and *Ad.nl* and public broadcaster *Nos.nl*. Quality newspapers *Volkskrant* and *NRC* and commercial broadcaster *RTL* formed the second group.

In 2016 a new research was set up, and again *Nu.nl*, *Nos.nl*, *Ad.nl*, *Telegraaf.nl*, *Rtl.nl*, *Volkskrant.nl* were in the top ten. (NOBO, November 2016). The new research combined use on all devices (computer, laptop, tablet and smartphone). *Nu.nl* (2nd) reached 45 percent of the population older than 6, *olkskrant.nl* (10th) reached 18 percent.

There is a growing number of online-only media in the Netherlands. Some focus on news (*Decorrespondent.nl*, *Nu.nl*, hundreds of hyperlocals) and others on specific subjects like tech, finance, food, culture or lifestyle. The online newsstand *Blendle.nl* reached one million subscribers in 2016.

1.5 Social Networks

Internet penetration in the Netherlands is high, with 92 percent of the people being online at least once a month in 2015 (CBS, 2016). This groups consists for an important part of people above 75 years of age, 50 percent of which go online at least once a month.

In October 2016 Facebook had 9.8m visits from people in The Netherlands, Linkedin had 4.2 million users monthly (6 million Dutch have an account), Twitter had 2.2 million active users a month, 2.1 milllion people said they used Instagram, Pinterest had 2 million users, 1 million people said they used Snapchat, 1.2 million visited a Tumblr page, Google+ had 740,000 monthly users in the Netherlands, Whatsapp was installed on 11.2m Dutch smartphones and 7 million people said to use it on a daily basis (Marketingfacts, 2017).

1.6 Opinion Makers

Our own research on all Twitter users in the Netherlands (November 2016) suggests that media and journalists (together with politicians) are heavy Twitter users. On a national and local scale, they are often the central 'hubs' when Twitter networks are made visible. As journalists and politicians are heavy users, there are many news items where Twitter is used as a source. Right-wing populist politician Geert Wilders has 750,000 followers on Twitter (but follows no-one), he almost never appears on TV, usually refuses to be interviewed, but tweets on a daily basis. His tweets therefore often end up in media items.

Newspapers are still an important source for politicians, in particular the four largest newspapers *De Telegraaf*, *AD*, *de Volkskrant* and *NRC Handelsblad*, and broadcasters *NPO* (public) and *RTL* (commercial). Their news often lead to questions in parliament and visibility in their programs - especially in the daily TV talk shows - is seen as very important.

1.7 Sources

Newspapers

- AD
- BN De Stem
- Brabants Dagblad
- Dagblad de Limburger
- Dagblad van het Noorden
- De Gelderlander
- De Telegraaf
- De Volkskrant
- Eindhovens Dagblad
- FD
- Leeuwarder Courant
- Nederlands Dagblad
- Noordhollands Dagblad
- NRC Handelsblad
- Reformatiorisch Dagblad
- TC Tubantia

Publishers

- Audax
- BDU
- De Persgroep Nederland
- Erdee Mediagroep
- FD Mediagroep
- Mediahuis
- NDC
- Sanoma
- TMG

Radio

- BNR
- Q-music
- Radio 538
- Sky Radio

Broadcast

- AVROTROS
- BNNVARA
- KRONCRV
- NPO
- VPRO

TV

- **RTL**
- **SBS**

Opinion makers

- **De Correspondent**
- **GeenStijl**
- **Reporters Online**
- **TPO**

2. Organisations

2.1 Trade Unions

The Dutch journalist union is the *Nederlandse Vereniging van Journalisten* (NVJ), which is the successor of the NJK that was founded in 1884. Journalism is a free trade in the Netherlands, membership of an organisation or registration is not required. The NVJ hands out press cards that can be used by journalists, organizes training of diverse subjects, negotiates with media on salaries and contracts and offers legal services for its members.

The NVJ is also very active in discussions on matters that are important for journalists and media like the freedom of information, copyright, layoffs, media policy and international issues concerning media and journalism. It participates in Raad voor de Journalistiek (RvdJ) that handles ethical issues between media and users. NVJ has around 8000 members, with freelancers (30 percent), newspaper (25 percent) as the largest sections. Membership is traditionally lower in broadcast journalism (NVJ yearly report 2015).

2.2 Journalist Associations

Journalists working in politics, sports and photojournalism also have their own organizations. Editors in chief are organized in the *Genootschap van Hoofdredacteuren*. Some freelancers are a member of other organizations like *Freelancers Associatie* (FLA). In 2016 *De Cooperatie* was launched, an organization that offers workspace, legal advice, sales and financial support for freelancers only. It works together with the NVJ.

2.3 News Agencies

The leading national press agency is *Algemeen Nederland Persbureau* (ANP) . It used to be owned by media themselves but is now privately owned. Almost every Dutch media uses ANP that also handles international exchange of news with foreign agencies. ANP issues news items, radio bulletins, photo’s, video’s and infographics. It also has commercial non-media customers. 250 people work for ANP, among them 160 journalists.

In 2001 competitor *Novum Nieuws* was founded. In 2015 ANP acquired *Novum*.

Regional newspapers had their press agency that provided non-local news and also worked as an exchange bank for news of the different papers. The GPD as it was called, closed in 2013. The reason was that all major regional papers were part of large media groups that provided national and international news themselves.

The AD-group, consisting of national newspaper AD with seven regional editions and the papers of the former Wegener group (*De Gelderlander*, *De Stentor*, *Brabants Dagblad*, *Eindhovens Dagblad*, *BN De Stem*, *TC Tubantia* and *PZC*) is part of De Persgroep Belgium that also publishes Amsterdam daily *Het Parool* and national dailies *de Volkskrant* and *Trouw* (and dailies in Belgium and Denmark). These newspaper groups provide the non-local news for all regional papers and also for the regional papers of the Limburg MGL-group and the northern NDC-group.

In the second largest newspaper group (TMG) national daily *De Telegraaf*, free daily *Metro* and four regional dailies in the provinces of North- and South-Holland share news.

2.4 Audience measurement organisations

Until 2015 *Het Oplage Instituut* (HOI) was responsible for providing publishers, advertisers and the audience with data on circulation (print and digital). These were published every three months. In 2015 HOI merged with *National Onderzoek Multimedia* (NOM) that was responsible for audience measurement. Now NOM measures both circulation and surveys audiences of newspapers, free weeklies (reach only) and magazines. Also the digital circulation is measured. Part of the information is freely available; the reports on circulation are issued each three months and cover a full year. Audience research is based on a sample of more than 20,000 inhabitants aged 13 years and older and is published every six months.

Online reach is measured by the *Vereniging voor Internet Exploitanten* (Vinex) and is published monthly. In September 2016, a new method was introduced, which measures reach on every device (laptop, tablet, mobile).

Not all publishers are member of Vinex or NOM, but advertisers usually require reliable and comparable data that only can be provided by these organizations. Most major publishers are therefor member of NOM and Vinex.

TV is measured by *Stichting Kijkonderzoek* (SKO). Radio by RAB.

2.5 Sources

- **National Onderzoek Multimedia** (NOM)
- **RAB**
- **Stichting Kijkonderzoek** (SKO)
- **Vereniging voor Internet Exploitanten** (Vinex)

3. Policies

3.1 Media legislation

Deregulation is a major issue in the Dutch media policy. An important change in the last year was that the limit on the market share of newspapers has been removed. This issue is now handled on an individual basis by the *Autoriteit Consument en Markt* (ACM), which saw for instance no problem in De Persgroep growing to a market share of more than 50 percent. In some cases, in the past, ACM required the sale of some titles or forbid the closure of competing editions.

In the last years, national and regional public broadcasters have been confronted by budget cuts and ‘forced’ mergers (non-cooperation led to extra budget cuts). Most national broadcast organizations merged with a former competitor: regional broadcasters are now grouped together and closer to the national public broadcasting organization NPO.

3.2 Accountability systems

If an audience member has a complaint about the content or behaviour of a medium or a journalist there are several options. One option is to file a legal issue in court (invasion of privacy, slander, harmful content) which can be time-consuming and costly.

An alternative is filing a complaint at the *Raad voor de Journalistiek* (RvdJ), that was founded in 1960. The RvdJ is a voluntary organization, media don't have to be members (although they can) and it cannot 'punish' media in any way other than to ask a specific medium to publish one of its verdicts. Issues involve privacy, one-sided reporting, slander, interviewing with hidden camera or microphone and lack of offering the possibility to comment on statements by others. The RvdJ usually only handles complaints that are issued against member media and only after a complaint at the medium itself had no success.

Complaining to the medium itself is of course the fastest and easiest way. Some media in the Netherlands (*De Volkskrant*, *NRC Handelsblad*, *NOS*) still have a ombudsman (or woman) that handled complaints.

3.3 Regulatory authorities

The government does not want to be involved with controlling media and media content on a regular basis. Therefore, it founded the *Commissariaat voor de Media* (CvdM) in 1988. The CvdM is particularly important in controlling websites and local, regional and national broadcasters. The licences for public local broadcasters (one for every municipality, financed by the government) are issued and controlled by CvdM. The CvdM also handles checking legal requirements like the ban on commercial activities by public broadcasters. Commercial activities like mergers and possible cartels are handled by the *Autoriteit Consument en Markt* (ACM).

3.4 Sources

- **Autoriteit Consument en Markt** (ACM)
- **Commissariaat voor de Media** (CvdM)
- **Raad voor de Journalistiek** (RvdJ)

4. Education

4.1 Universities and schools

There are four Schools of Journalism in the Netherlands: the oldest and largest (350 new students every year), in Utrecht, celebrated its 50th birthday in 2016; two schools with a Christian background (Zwolle, Ede); one with a Catholic background (Tilburg). These schools all have a four-year program in journalism.

Apart from these vocational training options, there are university programs in journalism, mostly at a master's level. These can be found in Amsterdam (both at the University of Amsterdam and the Vrije Universiteit), Rotterdam, Groningen and Nijmegen. Journalism, however, is a free trade, so there are many journalists with - usually - a university background and without formal training as a journalist. Regional publisher Wegener had their own training program in the past.

4.2 Professional development

Almost every School of Journalism and university with a journalism program offers courses and sometimes a part-time master's program for journalist. Media themselves, NVJ and FLA offer training programs as well. NVJ even has its own 'Academy'. Training, however, is not obligatory in the Netherlands.

4.3 Sources

- **AvJ** (Tilburg)
- **CHE** (Ede)
- **FreeLancers Associatie** (FLA)
- **Nederlandse Vereniging van Journalisten** (NVJ)
- **SvJ** (Utrecht)
- **Windesheim** (Zwolle)

5. Conclusions

5.1 Conclusion

The Dutch media are going digital at a rapid pace. This is shown by the growth in digital use and in users. With more than 90 percent of the population, online saturation is near. Social media are becoming more important. Traditional print media and TV are losing ground rapidly.

In the digital world, however, traditional media are still important and still dominant on some platforms. The large media brands are still the most viewed. A growth in the use of platforms where traditional media are less important (Snapchat, Facebook, Instagram), however, could change this development.

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