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Culture and the media 1994:1

Finnish Mass Media

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Preface

Finnish Mass Media is the fourth volume in the series of comprehensive statistical reports on the mass media scene in Finland by Statistics Finland. Like previous reports in the series, it is very much a product of cooperation: Statistics Finland and the Ministry of Communications have been working together to provide reliable data on the development of mass communication since 1985. During the past couple of years the Ministry of Education has also joined in.

Finnish Mass Media is an updated and slightly revised edition of Joukkoviestintätilasto 1993, in Finnish. In addition to the four statistical overview surveys on mass communication, several other reports have been published within this project on different aspects of the media field.

Finnish Mass Media was compiled by the Culture, media and time use unit at Statistics Finland. It was edited by Tuomo Sauri, who also wrote the summaries for the statistical section of the report. The tables were compiled by Irma Ollila; the figures designed by Rauli Kohvakka and drawn by Veli Rajaniemi; the layout was by Seija Töyräänvuori; and the translation into English by David Kivinen.

The six articles which open the report look at topical issues of mass communication from different angles. The interpretations suggested in these articles express the opinions of the authors.

Helsinki, May 1994

Hilkka Vihavainen

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Rauli Kohvakka

New "windows" for film distribution in Western Europe

Introduction

Film distribution saw some important changes during the 1980s. Most significantly, two completely new distribution channels or (as the professional jargon has it) two new "windows" were created for the feature film: video and pay-TV movie channels. Distribution via video was first started through rentals, but video sales were soon to follow. The programming of television movie channels, consisting solely or primarily of feature films, is broadcast via satellite and distributed to subscribers over the cable network or directly through satellite dishes.

Offering as they did a new alternative to cinema-going and to public-service programming, the new distribution channels also affected viewing habits. With the continuing expansion of cable networks and the spread of VCRs, increasing numbers were able to take advantage.

Overall the showing of feature films increased considerably during the 1980s. One important factor (apart from the growth of new distribution channels) behind this development was that national television companies were showing more films than ever before.

These changes on the film scene during the 1980s swept across the whole of Western Europe. By now, as we head towards the second half of the 1990s, the new distribution channels have a short history to look back on. The discussion below looks at the position that these new distribution channels have attained in the mass media landscape and film culture in Western European countries[1].

Videos

The trends in film-viewing on video are basically the same throughout Western Europe: in all countries video rentals are on the decline, while the sell-through market is growing. It is quite surprising to see how quickly the

1) In international comparisons it is important to bear in mind that data collection methods are bound to vary from country to country. These differences are not necessarily mentioned in the sources. It is also possible that different sources give somewhat different figures. For these reasons the figures must be examined with caution.

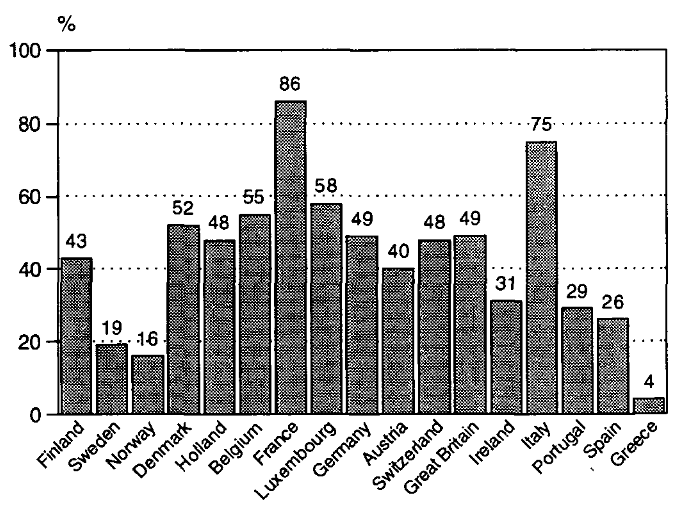
popularity of video rentals has declined. Even though the general pattern is very much the same in all Western European countries, the pace at which things are changing is not. Leading the way is France, where the purchase of videos has by now largely taken over from rentals. In 1992, sell-through videos accounted for 86 per cent of the total video market (Figure 1; see Screen Digest, January 1993). France has probably reached some sort of saturation point as the turnover of video sales is no longer increasing. However, the relative share of sales in the total video market may continue to increase as the turnover of film rentals is still on the decline.

The movement away from rental towards sell-through videos started in France. As early as 1989, sell-through videos accounted for 64 per cent of the French video markets. In most other countries this was the year when the first signs were seen of the tide beginning to turn; when the growth of sell-through videos and the decline of rentals began in earnest. The other European country where the development has advanced much further than elsewhere across the continent is Italy, where sell-through videos account for 70 per cent of total market turnover.

Most Western European countries will probably soon have reached the same situation as France. In Denmark, Holland, Belgium, Luxembourg, Germany and Switzerland, sell-through videos already account for about half of the video markets, and in value terms sales are growing at an accelerating rate.

In other countries the change is proceeding less rapidly. In Sweden, Norway, Spain and Greece, for instance, film sales represent a smaller part of the

Figure 1.
Video sales as per cent of video markets in Western European countries in 1992



Sources: Sauri 1993; Screen Digest, January 1993.

video markets than in the countries mentioned above, and the rate of growth is slower. In the light of the statistics available, the Greek sell-through markets are negligible. However, the official figures do not include the sales of illegal copies, which is a major business in Greece.

In Finland, it would seem that rental videos do not represent a very important channel for film-viewing. Rentals of video films are continuing to decline. Following a relatively long period of sustained growth, the turnover of video rentals has now been declining for the past few years. On the other hand, the purchase of sell-through video films is sharply increasing. Video films sales are growing steadily; by 1992 their share of the total market turnover had climbed to 40 per cent (Sauri 1993). Taken as a whole, the growth of the video market has now come to a standstill.

The replacement of video rentals by sell-through videos also implies a partial replacement of films by other types of programming, for a substantial part of sell-through videos are outside the film category. Rental videos, on the other hand, consist almost exclusively of feature films.

If the growth of sell-through videos at the expense of video rentals continues and reaches the levels achieved in France, then it is likely that we will be seeing a change in the order in which film distribution is started in different channels. Today, the first step in the normal distribution sequence is that films have their cinema premiere; they are then copied on video for rental shops; and finally after a certain time-lag they become available on sell-through video. The time-lag required between these steps varies from country to country depending on local agreements and legislation. In the future video rentals and sales will probably be allowed to start at the same time. If the rental markets continue to decline at the rate they have been declining in recent years, there is no good reason to postpone the beginning of sales.

Another reason why we may expect to see changes in the distribution of films on video lies in the extent of illegal duplication and sales. The delay in starting up sales of films perfectly suits the needs and interests of the pirating business.

Pirating is in fact a major difficulty which makes the video a somewhat problematic distribution channel; there is no other method of film distribution which has to try and cope with such a problem. Pirated copies were mentioned as one of the reasons why the video distribution of Terminator 2 was started in Germany three months after its cinema premiere, even though Germany has an agreement for a six-month interval between these two "windows". In former East Germany, pirated copies are sold quite openly at markets. The costs of pirating to video distributors in Germany alone is estimated at around 172 million dollars per annum (Variety, 16 November 1992).

In Western Europe movie channels have not yet made what might be termed a proper breakthrough, but nonetheless they have established a firm position as part of our film culture. Pay-TV movie channels are currently available in virtually all Western European countries; languages include English, German, French, Dutch, Flemish, Italian, Spanish, Swedish, Norwegian, Danish and Finnish. In spring 1993 the total number of movie channels in Western Europe was 15 (counting the different language versions and different picture sizes on the same channel as one channel; see Screen Digest, May 1993).

The first satellite channels carrying solely or primarily feature films started up in Western Europe in the early 1980s. However, they remained very short-lived. The current movie channels have started operations after the mid-1980s, most of them towards the end of the decade (Screen Digest, May 1993).

Movie channels have most subscribers in France and Great Britain. In France, Canal Plus had in autumn 1993 a total of 3.6 million subscribers, while on the other side of the Channel British Sky Broadcasting recorded 1.9 million movie channel subscribers; these figures include both cable and satellite dish subscribers. In addition, Canal Plus programming is broadcast via the public service network. In Germany the Premiere channel has 625 000 subscribers. In Sweden movie channels have a total of 470 000 subscribers. In other countries the number of subscribers is a couple of hundred thousand at most (Cable & Satellite 6/1993 and 9/1993).

In relative terms, however, movie channels are not very common in any country with the exception of France, where 14 per cent of the households are subscribers. In Sweden the figure is just under 10 per cent[2)]. In other Western European countries only a few per cent of households get pay-TV movie channels.

In Finland movie channels have failed to establish a very firm footing in film culture; only a couple of per cent of the households in the country get movie channels. At the end of 1992 the only movie channel that is received in Finland FilmNet had 52 000 cable subscribers, which is about 5 per cent of

2) In reality the figures are somewhat smaller because not all subscribers are households. What is more, in the case of Sweden the statistics do not take account of the overlap between the two channels.

the total number of cable households. The number of FilmNet subscribers has been slowly increasing with the continuing expansion of cable networks.

However, movie channels are the most popular type of pay-TV satellite channels in Western Europe; the only real rival they have are sports channels. On the other hand, movie channels have less subscribers than packaged satellite channels which are either completely or almost free of charge. The biggest free channels such as MTV Europe, Super Channel and Eurosport, have almost 30 million connections each in Western Europe.

Even though they are still to make their final breakthrough in Western Europe, movie channels are nevertheless big business: in 1991, Canal Plus (which operates in France, Belgium, Spain and Germany) reported net incomes through subscriptions totalling FF 5.8 billion, while British Sky Broadcasting was expected to pocket GBP 220 million through its movie channel subscriptions in 1992.

Movie channels earn most of their income through subscription fees. Revenue from advertising is far less significant; the figure for Canal Plus, for instance, is estimated at around 5 per cent (Cable & Satellite 6/1992). Most of the expenses of pay-TV movie channels go towards the purchase of presentation rights. It has been estimated that about 60 per cent of their income goes to film distributors (Cable & Satellite 6/1992).

Movie channels operating within the same area have to fight not only for subscribers but also for interesting films. This pushes up the price of the most popular films and by the same token the expenses of movie channels. In Britain, the recent case of BSB vs. Sky Television is a telling example. Hollywood film studios are of course quite content with the situation. In 1990, it was estimated that the total value of films sold to the two British firms and to Canal Plus was at just under 300 million dollars (Cable & Satellite 8/1990). It seems that movie channels do not have the resources to tolerate severe competition for prolonged periods of time. In Great Britain the competition between BSB and Sky resulted eventually in a merger and the founding of British Sky Broadcasting. Likewise, the Scandinavian markets were too small to tolerate the competition of two film channels; after just two years, TV1000 and SF Succé joined forces in autumn 1991.

Second-generation pay-TV movie channels, known as pay-per-view channels, still remain at an experimental stage in Europe. In this system subscribers only pay for the films they have ordered. The first European pay-per-view channel was launched in Holland in late 1991, but it was closed down within 12 months (Cable & Satellite 4/1993).

Long-term trends in cinema-going have been very similar in all Western European countries: people go the pictures less often than they did in the early 1980s. In Spain, Italy and Portugal, the number of admissions per capita has dropped most dramatically by one half.

More recently, however, the trends in film-going have been less consistent. In most countries the average number of admissions has remained at more or less the same level, even though there is some annual variation (European Marketing Pocket Book 1993). Great Britain is an interesting case that stands apart from all other countries: here, after a sharp decline in the early part of the decade, cinema-going has started to increase again.

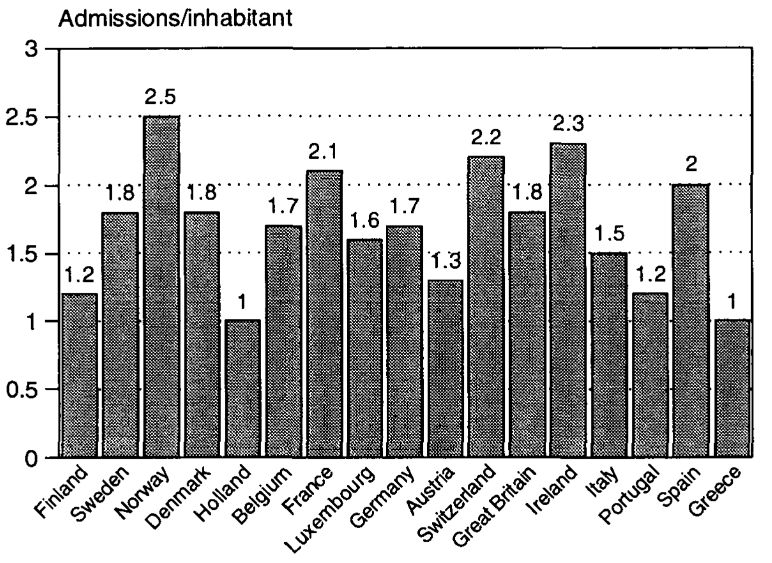
Even though cinema-going has decreased in the long term in all Western European countries, there are major differences between individual cases. The most frequent film-goers are found in Norway, where the average figure is 2.5 times a year (Figure 2). The French, Swiss and Irish also go to the pictures more than twice a year. The least frequent film-goers are found in Finland, Holland and Greece.

Finns go to the pictures less frequently than ever before; in 1992 the figure was 1.07 times per capita. Just ten years earlier the figure was twice as high. One of the main reasons for the sharp decline lies in the new distribution channels and the increase in feature film showings on television.

The average number of admissions is a fairly crude indicator of cinema-going which is clearly more frequent among certain population groups than others; most notably among young people, city-dwellers and people with a high level of education. In different countries cinema-going habits may be very similar within different population groups, and differences reported in the average number of cinema admissions may be partly due to differences in the size of the population groups concerned. Changes and differences of the order of a few tenths may seem very small, but it is important to remember that a few tenths in this case may mean a change of several hundred thousands in ticket sales and a change of millions in annual takings.

In Finland cinemas are currently the major film distributor in value terms, even though they too have seen their takings decline. In 1992 the figure was FIM 174.3 million. At the same time the turnover of the video rentals market was FIM 155 million, while sales of videos (of which only a small part are films) amounted to FIM 105 million.

Figure 2.
Film admissions per inhabitant in Western European countries in 1991



Source: European Marketing Pocket Book 1993

The movie in the United States

Compared with the situation in Western Europe, the trends in the consumption and distribution of films have been very different in the United States. First of all, sell-through videos are not taking over from video rentals; in 1992, sell-through videos accounted for 31 per cent of the video markets (Screen Digest, April 1993). The figure has admittedly increased somewhat in recent years, but only by a few percentage points per annum. Further, there has been no change in the popularity of video rentals comparable to the situation in Western Europe.

Secondly, pay-TV movie channels are far more common in the US than they are in Europe. In 1992 almost 40 per cent of the households with television were subscribers to some pay-TV movie channel (Screen Digest, March 1993).

One explanation for this intercontinental difference lies in the different histories of the respective mass media systems. In the US pay-TV channels started up in the mid-1970s, before the age of the VCR. By the end of the decade over 10 per cent of the television households in the US had subscribed to a movie channel. At the time that European movie channels started up, almost ten years later, VCRs were already in widespread use. The US has had pay-per-view channels ever since the late 1980s, but their role in film-viewing has remained quite insignificant.

In value terms the most significant distribution channel for films in the United States is represented by video. In 1992, the turnover of the video markets was almost 12 billion dollars, with feature films proper accounting for an estimated three quarters of the figure. At the same time cinema takings were 4.9 billion dollars. People spent slightly less or 4.6 billion dollars in subscriptions to movie channels (Screen Digest, March 1993; Variety 18 January 1993).

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Screen Digest, January 1993, March 1993, April 1993, May 1993.

Variety, 16 Nov 1992, 18 Jan 1993.

Implementation of the EEA Agreement and its impacts on legislation in audiovisual media in Finland[1]

With the entry into force of the EEA Agreement in 1994, the European internal market was extended to include the EFTA countries (with the single exception of Switzerland). The original idea behind the internal market scheme was to make possible the free movement across national borders of goods, capital, persons and services. The goal was to promote economic growth and to create a more favourable business environment so that the Union would be better placed for trade competition with the United States and Japan.

The EEA Agreement has both general implications and certain specific impacts on the audiovisual media operating within the European Economic Area. For the audiovisual industry in Finland as well as in all other EEA countries, the agreement meant full recognition of the principal EU directives for the regulation of the industry.

All in all the legislative impacts of the EEA Agreement on the Finnish audiovisual media are fairly limited. The most significant changes have to do with the number of commercial breaks in television programming: Finnish television has traditionally exceeded the EU regulations. However, the changes will be implemented in a piecemeal fashion.

General implications

The discussion below on general implications is concerned with two issues: restrictions on ownership and legislation on competition.

Any existing restrictions on ownership based on the nationality of the owner in the field of media have been removed from legislation.

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1) Finland signed the EEA Agreement on 2 May 1992 together with the other EFTA countries, the European Union as well as the Union's member states. The Swiss referendum in late 1992 decided against adoption, and consequently ratification of the agreement had to be postponed until 1 January 1994.

Operating licences both for public service broadcasting and for private commercial operations, and both for television and for radio, are granted as previously by the government. There have been no restrictions in the law on ownership; in this regard there have been no changes.

Legislation on granting licences to cable network operators contained certain restrictions based on nationality; these restrictions have now been removed.

Similarly, restrictions based on nationality within the Freedom of the Press Act have been removed: not only Finnish nationals but everyone has the right to publish printed matter.

It is important to note that the restrictions on ownership in the Freedom of the Press Act as well as in legislation on cable operations have been removed *in toto*, even though the requirement in the EEA Agreement is simply for lifting such restrictions for the EEA countries.

With the entry into force of EU legislation on 1 January 1994, competitors gained the right to file complaints about Finnish media companies and their operations by appealing either to the EFTA Surveillance Authority or directly to the EU Commission.

Implications for the audiovisual industry

The European Union's audiovisual policy consists of three concrete components: the Television without Frontiers Directive 89/552/EEC, the MEDIA programme, and regulation concerning new technical standards in television. In addition, the EU copyright policy is directly relevant to the audiovisual industry. The only aspect not covered by the EEA Agreement is EU policy concerning new technical standards in television.

The Television without Frontiers Directive has to be implemented in national legislation. The following lists the steps that have been taken:

Legislation on cable operations has been so revised that any satellite broadcasts transmitted from Finland must comply with the Television without Frontiers Directive.

To comply with provisions contained in the Directive, a paragraph concerning rectification of incorrect information has been added to the Broadcasting Responsibility Act. Proceedings for obtaining rectification can be instituted at the Helsinki district court.

A corresponding provision for rectification of incorrect information was already contained in legislation on cable operations. With the implementation of the Directive, the claimant may file a claim for correction with the Helsinki district court.

In Finland there are two nationwide television companies: the public-service broadcaster YLE (the Finnish Broadcasting Company), which operates in two nationwide networks (TV1 and TV2), and the private commercial broadcaster MTV Finland, which operates on TV3.

There is a special law to govern the operations of the Finnish Broadcasting Company YLE.

Implementation in the case of YLE is so organized that YLE's Administrative Council, following the recommendation of the Ministry of Transport and Communications, has decided on 2 March 1994 to charge the company with the obligation of complying with the Television without Frontiers Directive and its provisions.

MTV Finland was granted its own licence on 2 September 1993. The regulations of the MTV Finland operating licence contain the following provision: "When Finland has ratified the Council of Europe convention on transborder television activities and/or the European Council's directive on the harmonization of laws, orders and administrative regulations regarding television activities which was issued on 3 October 1989 (89/552) has come into force in Finland, MTV Finland shall be obliged to comply with the regulations concerning television activities contained in them insofar as they are in conflict with the above licence conditions.

With regard to alcohol advertising, the regulations in Finnish legislation shall be observed.

The Ministry of Transport and Communications shall have the rights to issue regulations regarding broadcasting activities to MTV Finland in accordance with binding international agreements."

With the coming into force of the Television without Frontiers Directive, Finnish authorities will also be under obligation to report to the EFTA Surveillance Authority on such aspects as quota implementation.

The restrictions on television commercials included in the Directive must be put into effect. In practice, this means that MTV Finland will have to reduce the number of commercial breaks in its programming.

The Directive includes two significant quota provisions: first, a 50 per cent quota for European production and second, a 10 per cent quota for independent European producers. In connection with the EEA arrangement the definition of European programme was so expanded that it now covers not only programmes produced within the member states of the European Union but also programmes from the EFTA countries joining the EEA mechanism.

The programming of both YLE and MTV Finland meet these quota requirements; in fact at YLE the share of European production is as high as over 80 per cent. The quota for independent European producers is based on estimates because the EU has no unambiguous definition for the concept of independent European producer.

Finnish producers have been able to apply for financial support through MEDIA programme even before. Now, with the EEA Agreement, the European programme for supporting audiovisual productions will be fully implemented. This represents a significant addition to the existing domestic sources of support. With the implementation of the EEA Agreement Finland will also gain a full seat in the administration of the programme.

So far the EEA Agreement has required only one change to existing copyright legislation in the audiovisual industry: that change concerns the exhaustion of distribution rights caused by the publication of a film. According to earlier Finnish legislation distribution rights did not expire at all for films. The new arrangement entails that a film recording may be re-sold insofar as the product has been released in another EEA country with the copyright holder's consent.

Further changes may be expected in copyright legislation when the EU directives concerning rental and lending, satellite broadcasting and cable distribution, and harmonization of the term of protection of copyright and related rights are implemented within the EEA area. In Finland the directives will be implemented by making the necessary changes to existing copyright legislation.

The above-mentioned copyright directives will not be automatically implemented in Finland, but they form part of the so-called additional EEA package with which EU legislation adopted after August 1991 is incorporated into the EEA Agreement. The implementation of the directives requires a decision by the EU Council of Ministers and the EEA Joint Committee and the approval of the European Parliament and the parliaments of all EFTA countries. In practice it is already clear that the copyright directives will be implemented in the EEA area.

The directive on rental and lending and the directive concerning satellite broadcasting and cable distribution will probably be implemented in Finland by 1 January 1995. The directive concerning the harmonization of the term of protection of copyright, which will extend the duration of protection of copyright to 70 years from the copyright holder's death, is due to be implemented by 1 July 1995.

In conclusion, it should be noted that with the eventual entry into force of the Television without Frontiers Directive, Finnish authorities would be unable to prohibit the reception of foreign broadcasts containing alcohol commercials. However, they would (this came as a concession in view of the stricter alcohol policies in EFTA countries) be able to prevent the retransmission of these commercials in national cable networks. This will hardly have any real impact because in practice it is impossible to edit out commercials.

In its negotiations with the EU on its terms of membership, Finland decided consequently to abandon this objective. As a full member of the Union, Finland will not be able to require that cable TV operators remove any alcohol commercials from their transmissions. Even in the EEA arrangement the relevant paragraphs amount to little more than a dead letter.

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The print media in Finland: prospects for internationalization

Introduction

Finland is one of the world's leading countries in print media consumption and production: circulation statistics for books, newspapers and magazines and the number of new titles published per annum (relative to population) are among the highest in the world. Finland also ranks among the top league in the advertising business, where the print media take up a large part of the advertising cake. In this light it is hardly surprising that Finland's publishing and printing industry accounts for a larger proportion of GNP (3 %) than is the case in most other West European countries, where the figure is normally in the range of 1–2 per cent.

Table 1.
The consumption of print media products and advertising in Finland compared with typical values for industrial countries

Parameter of media consumption	Finland	Typical industrial country
Newspapers		
– circulation/1 000 population	521	200 – 350
Magazines		
– circulation/1 000 population	2 500	600 – 2000
Books		
– titles/10 000 population	20	8 – 15
Reading time (min/day)		
– newspapers	40	30 – 45
– magazines	40	15 – 30
– books	25	20 – 35
Advertising		
– % of GNP	0.9–1.0	0.7 – 1.0
– papers & magazines share of media advertising	80	60 – 80

Sources: FIEJ 1993; FIPP 1989; Unesco 1992; Suomen graafisen...1993

In 1992 the total value of deliveries by Finland's publishing and printing industry amounted to FIM 15.6 billion; value added was FIM 6.9 billion. The industry ranks among the five biggest branches in the country, sharing fifth position with the chemical industry. (Table 2.)

Table 2.
Finland's top five industries: gross sales and value added in 1992

Industry	Gross sales FIM billion	Value added FIM billion
Engineering & metal	83	31
Forest	56	18
Foodstuffs	49	13
Chemical	16	7
Publishing & printing	16	7

Source: Suomen graafisen...1993.

The total number of businesses currently operating in the publishing and printing industry in Finland is around 2 300, of which about half are engaged in the printing business. The majority of the companies are small businesses with less than five employees; the number of businesses with more than five employees is around 700. The general picture is very much the same in all European countries: Over 70 per cent of the printing shops in Europe have a workforce of less than 20 people, and in many cases (including Finland) the figure is over 90 per cent. Only less than 5 per cent of Europe's printing houses employ more than 100 people (Pätynen 1991).

On a number of dimensions Finland's publishing and printing industry accounts for as much as 5-10 per cent of the total figure for all branches of industrial production. The publishing and printing industry is highly labour-intensive. (Table 3.)

Table 3.
Selected statistics on the publishing and printing industry and its share of total industry

	Publishing and printing	Per cent of total industry
Workforce (N)	33 000	9.0
Gross sales (FIM billion)	15.6	5.8
Value added (FIM billion)	6.9	7.5
Working hours (1 000 hours)	47 900	8.3
Wages (excl. social expenditure; FIM million)	4 100	9.4
Exports (FIM million)	880	
Imports (FIM million)	670	
Businesses approx. (N total)	2 300	
Businesses approx. (min. 5 employees)	700	

Source: Statistical facts... 1993

The industry's main product groups are books, newspapers and magazines, which together account for about three quarters of total sales. Other product groups include advertising materials, forms, packing materials, diaries and calendars, and labels.

It was noted above that the publishing and printing industry accounts for about 3 per cent of Finland's GNP and that this is a relatively high figure in an international comparison. One explanation lies in the very high level of newspaper and magazine circulations in Finland, and more generally in the fact that Finnish people are avid readers. However, part of the explanation lies elsewhere: that is, in spite of rising costs in the 1980s, the industry's growth and profitability was successfully maintained by a policy of price hikes. This in turn was possible because the whole branch had long enjoyed a fairly protected status on the domestic markets. The situation is now changing as consumers and advertisers have much greater freedom of choice: commercial local radio stations, morning television and regional TV advertising (and to some extent video and satellite television) are now offering competitive alternatives to the print press, which has very much dominated local mass communication and advertising.

For reasons that have to do with language and local culture, it has not been easy for foreign media products to break into the Finnish marketplace. However, the protective barriers of are clearly beginning to crumble now; Finnish publishers are facing increasing competition with the influx of foreign imported books, specialized magazines, hobby magazines and other similar products. The challenges for outsiders have been even greater in newspapers and general-interest magazines, but not insurmountable: for instance, it seems that the new general-interest magazine 7 päivää, launched by the Danish publisher Aller in 1992, has reached its circulation targets in Finland, at least for the time being.

There is also indication of increasing foreign competition on the production side. Most notably, publishers might want to consider relocating their printing functions to countries where labour costs are lower (such as the Baltic states), particularly in cases where product quality is not a vital concern and where timetables are flexible. In Estonia, for example, the average earnings of printing shop workers are less than one twentieth the wages pocketed by the average printer in Finland and this is in an industry where wages are above the national average for industrial jobs. However, at least so far there has been only very little movement of production functions outside Finland's national borders.

The exports of Finland's publishing and printing industry have long been slightly above the level of imports. The recent changes in international exchange rates have favoured exports from Finland. In 1992, total exports of the publishing and printing industry amounted to FIM 880 million, showing an increase of 15 per cent on the previous year. The figure for imports was FIM 670 million, or less than 6 per cent more than in the previous year.

Exports account for only about 5 per cent of the industry's total production volume, and imports for about 4 per cent. In an international comparison both of these figures are relatively low. (Table 4.)

Table 4.
Exports and imports in the printing industry: share of turnover in selected countries in 1991

Country	Exports %	Imports %	Exports–imports FIM million
Austria	21.3	45.0	–1 566
Denmark	13.0	11.3	164
Finland	4.5	4.1	58
France	9.3	12.5	–2 105
Germany	17.0	8.5	6 480
Great Britain	37.7	32.6	1 062
Italy	22.0	7.2	2 763
Japan	..	..	–471
Netherlands	29.6	26.3	442
Norway	3.6	25.9	–1 014
Spain	7.3	6.6	188
Sweden	3.1	7.6	–1 304
Switzerland	7.7	15.7	–2 073
USA	..	..	6 453

Source: Suomen graafisen...1993.

In the group of Nordic countries, the share of imports is lowest in Finland and highest in Norway. The share of exports is somewhat higher in Finland than in Norway and Sweden, but substantially smaller than in Denmark. (Table 4.)

Following the dramatic setbacks in foreign trade with the Soviet Union in the early 1990s, the publishing and printing industry has worked hard to increase its market shares in other countries. In 1992 two thirds of the industry's exports went to other Nordic countries. By far the most important

Table 5.
Exports and imports of the Finnish publishing and printing industry in 1992.

	Exports %	Imports %
Denmark	12	10
Germany	3	15
Great Britain	8	15
Italy	..	5
Norway	11	..
Netherlands	3	4
Russia	5	..
Sweden	45	23
USA	..	10
Other countries	13	18
Total	100	100

Source: See media statistics section, tables 1.12 & 1.14 in this volume.

export market was Sweden, where the Finnish printing industry is highly competitive owing to the different structure of printing capacity in Finland and Sweden (Rimpiläinen 1992). It seems that exports are now beginning to pick up in other directions as well, most notably in the Baltic states, Russia and eastern Central Europe.

Finland has now gained a definite competitive edge in the printing business: there is sufficient production capacity, the industry has in place a competent workforce, and the devaluation of the Finnish Markka has made prices more attractive. (Table 6.)

Table 6.
Labour costs per hour in the printing industry in selected European countries in 1992 (ECU)

Denmark	22
Finland	16
Germany	22
Great Britain	13
Greece	8
Norway	19
Netherlands	18
Sweden	22
Switzerland	23

Source: Wilson 1993.

Although Table 6 probably gives an exaggerated picture of the differences in real wages between Finland and Sweden, for instance, the difference is definitely there. During the 1970s and 1980s, wage levels in Finland were roughly the same as the European average. Towards the end of the 1980s, printers in Finland were amongst the best-paid in the whole of Europe, but since then wages have dropped well below the average level. The main reason for this has been the devaluation of the Markka, but that may not be a lasting asset for Finland.

In Central Europe there is a very strong movement now towards the use of recycled paper. Belgium, for instance, is working on legislation to introduce an "eco-duty" that will also be applied to imported products, which include magazine paper and newsprint. In Germany, draft laws on the use of recycled paper are already affecting the export of paper and paper qualities. In the future the availability of recycled paper may well become a critical resource problem for printing shops with export markets in Europe. In addition, Finland's forest management policies have recently come under heavy attack from Central Europe. This is bound to have adverse effects on the exports of Finland's paper and printing industries at least in the short term.

Compared with the country's paper industry, Finnish publishing & printing exports are quite modest. In 1991 exports amounted to around FIM 0.8 billion, while the figure for the export of newsprint and stationery was FIM 13.4 billion. In principle it would make sense to step up the export of printed products: in 1991 prices for printed products were around FIM 12/kg against just FIM 3/kg for base paper (Törn 1992).

However, a comparison of the export and import prices in the p&p industry reveals an imbalance again to Finland's disadvantage. According to one source the average export price for a kilo of paper in Europe is FIM 20, while in Finland the price is less than FIM 15. The import price in other European countries is around FIM 20-30, whereas in Finland the figure is almost FIM 40. In a comparison of 12 European countries, Finland has the lowest export prices and the highest import prices. (Suomen graafisen... 1993.)

In short then, Finland is selling out cheap products and buying in expensive ones. In exported products the added value component of production is still far too low in view of the country's modern production machinery, the high-quality raw materials, and the high standards of workmanship.

The reason for this unfortunate imbalance in import and export prices lies, in part, in the fact that a very large proportion of Finnish exports consist of long production runs, which means that unit prices cannot be very high. Finnish printing ships also do subcontracting work for foreign publishers. Here, the billing for production represents only a small part of the final price

Table 7.
Exports and imports of the Finnish publishing and printing industry in 1992

	Exports %	Imports %
Printed matter for advertising purposes	40	37
Newspapers & periodicals	30	16
Books & leaflets	17	35
Forms & labels	8	3
Other	5	9
Total	100	100

Source: See media statistics section, tables 1.11 & 1.13 in this volume.

of the product. Imports, on the other hand, consist of small batches and generally of expensive items such as English-language books, where the unit price is always high. The export of Finnish books is negligible.

Models of internationalization

Viewed as a process, the print media product can be seen as involving three parties: publisher, printing house, and reader. In a more detailed analysis the chain obviously includes other links as well (e.g. advertisers).

In the traditional publishing model, the publisher will go to a printing house within the same country and have a product made for a domestic readership. The publisher may also have the printing done in some other country, even when the product is intended for the domestic market. In principle the Finnish publisher may also operate on foreign reader markets and have the product printed either in Finland or in some other country.

Newspapers and other periodical print media with tight production schedules have to be printed near the markets; the printing of weekly magazines, for instance, cannot be taken out of the country. However, telecommunication has helped to shorten the time-lag here in that written information can now be transmitted via modem to printing shops in virtually any corner of the globe.

While this obviously acts to intensify competition for Finnish printers, it is important to remember that the modem links work both ways; they can equally be used for winning new customers. In practice all this means that competition in the field is getting fiercer and that the transport of printed products is emerging as a crucial time factor.

A foreign publisher may sell a product that has been made abroad directly to Finnish readers; indeed foreign-language books and magazines have been available in Finland for many decades. Accordingly, Finnish magazines and books are sold (in rather small quantities) to Finnish expatriates in Sweden and recently to Estonia as well.

Foreign publishers may also operate on the Finnish markets through a local subsidiary. Valitut Palat (Reader's Digest) and Kotivinkki (ICA-kuriren), for instance, are edited and printed in Finland for Finnish readers. In some cases the printing is done in the country of origin; the German magazine Burda is a case in point. Further, the foreign publisher may decide to have the printing done in Finland even when the readership is in the publisher's home country. Algraphics from Finland, for example, does commission printing for products sold on the Polish markets.

In the movement towards internationalization in the publishing and printing business, cooperation is bound to play an increasingly important role. There are already various arrangements for international exchange of stories and picture material. In short: these forms of cooperation are encouraging an intensified development in the publishing business towards internationalization.

The internationalization of publishing in Finland: magazines as a case in point

The text above outlined some models of internationalization from the point of view of the publishing chain that involves the publisher, printing house and reader. We now move on to take a closer look at the process of internationalization in the Finnish publishing business by special reference to the field in which the trend is perhaps most clearly visible: magazines.

The internationalization of the magazine business in Europe gathered considerable momentum during the 1980s. There were several reasons. Helene Hafstrand (1993) identifies what she regards as three key factors. Most importantly, she says, many major European publishers were faced with a situation of market saturation at home. In addition, there was much talk about putting a halt, by legislative means, to the continuing centralization of the printed press. In this situation it is quite understandable that the media showed a serious interest in foreign markets.

Another important background factor to internationalization was the incorporation during the 1980s of many magazine publishers into major multimedia corporations, which were globally oriented to start with.

Third and finally, Hafstrand refers to visions of emerging supranational or pan-European advertising markets and to related ideas of "converting magazine groups into advertising packages" (Arnold 1992). Some of the big European publishers have experimented with deals with supranational trademarks on advertising contracts covering several countries.

Many of the biggest and most famous European and American magazines are multinational, appearing as local editions in different languages (and sometimes under different names) in different countries. Often edited and adapted to the local markets, many of these magazines differ from the host paper in terms of contents as well. Table 8 lists some of the biggest multinational magazines that have local editions in different countries.

Some of the results of the "pan-Europeanization" of magazines can be quite surprising. For instance, according to one source the market share of *German* magazine publishers (especially Burda, Bauer Verlag, Gruner+Jahr) on the *French* markets for women's and fashion magazines is now in excess of 50% (Hafstrand, ibid.).

Table 8.
Local editions of some multinational magazines in selected countries

	E	NL	GB	I	F	S	D	SF	H
Auto-Bild		x	x	x	x		x		x
Burda Moden	x	x	x	x	x	x	x	x	x
Cosmopolitan	x	x	x	x	x		x		
Elle	x	x	x	x	x	x	x		
Essentials	x		x	x	x			(x)*	
Marie-Claire	x	x	x	x	x		x		
Playboy	x	x		x			x		x
Reader's Digest		x	x	x	x	x	x	x	x
Vogue	x		x	x	x		x		

* Essentials ceased publication in Finland at year-end 1993.
Country abbreviations: E = Spain, NL = Netherlands, GB = Great Britain, I = Italy, F = France, S = Sweden, D = Germany, SF = Finland, H = Hungary

Source: Arnold 1992.

In itself the movement towards internationalization in the magazine business is nothing new. In Scandinavia, the movement of magazines across borders has been greatly facilitated by a common language. The Scandinavian pioneer is the Danish publisher Aller, which started publishing in Sweden as early as the 1870s. (See e.g. Gustafsson 1990.)

In Finland, the most traditional foreign magazine is Reader's Digest, which started up in 1945. Originally published by Sanoma Group, the country's biggest general-interest family magazine (with a net circulation of 350 000 copies in 1992) is now published by the Finnish subsidiary of Reader's Digest. Another foreign magazine with long traditions in Finland is Donald Duck, which was brought to Finland by Sanoma Group in the early 1950s.

In the early 1970s Kustannus Oy Williams, the Finnish subsidiary of Warner Communications, published comic strips, readers as well as men's magazines in Finland. Shortly before they pulled out of the country, Warner also acquired a number of Finnish women's magazines (some of which are now owned by one of the biggest domestic publishers, A-lehdet).

The arrival of major Scandinavian publishers in Finland started in the 1980s. They have continued to strengthen their presence in the country during the early 1990s, thus increasing the market share of foreign publishers of the Finnish magazine markets.

Table 9 describes the current situation in Finland's magazine business. Measured in terms of publishing volumes, the share of the publishers in foreign ownership is just under 15% of the total volume of the top eight publishers. The figure is still comparatively low, although it has of course increased since the mid-1980s.

Bonnier Julkaisut, the Finnish subsidiary of the biggest magazine publisher in Sweden and in the Nordic countries, was set up in Finland in 1986. Bonnier publishes four special interest magazines in Finland (Tieteen Kuvalehti, Tee Itse, Kunto Plus and Uudet Käsityöt). Bonnier actually made its first appearance in Finland in the 1970s through Semic International, publisher of comic magazines, children's magazines and crosswords that is part of the Bonnier Group.

The Finnish subsidiary of the Swedish ICA-Förlaget is called Kustannus Oy Forma, which began to publish Kotivinkki in 1983. The magazine is modelled on ICA-kuriren, which in circulation terms is Sweden's biggest magazine. Other magazines published by Kustannus Oy Forma are Trendi and Suhteet.

Denmark's biggest magazine publisher Aller entered Finland's magazine markets in spring 1992 by launching a general-interest magazine called 7 päivää (7 days). In volume terms Aller made an impressive start, pushing

Table 9.
Finland's top eight publishers in periodical press: mutual shares of volume in 1991/92

Publisher	Volume* Million copies	%	No. of titles in 1992**
Yhtyneet Kuvalehdet Oy	45.8	37.5	27
Sanoma Group	33.6	27.5	28
A-lehdet Oy	23.0	18.8	9
Bonnier Group:			
– Kustannus Oy Semic	3.5	2.9	34
– Bonnier Julkaisut Oy	2.0	1.6	4
Aller Julkaisut Oy	4.8	3.9	1
Oy Valitut Palat – Readers'Digest	4.2	3.4	1
Kolmiokirja Oy	2.6	2.1	12
Kustannus Oy Forma	2.6	2.1	3
Total	122.1	100.0	

* Volumes for Readers' Digest and Aller for 1992, others for 1991. For magazines without audited circulation (mainly comic books), the volume figures have been estimated.
** Includes magazines published at least four times a year; does not include crossword puzzle magazines published by Kolmiokirja and Semic.

Source: Sauri 1993
Circulation statistics: Levikintarkastus Oy.

ahead of Reader's Digest in the table of top general-interest publishers. 7 päivää is the first foreign-owned general-interest magazine since Reader's Digest that has made its way into the Finnish markets.

It is perhaps not too crude a simplification to state that today, the biggest magazine publishers of Scandinavia think of their main "domestic market area" as consisting not of individual countries but rather of the whole of Scandinavia including Finland. The language barrier between Finland and other Scandinavian countries is still there, but the cultural barrier is relatively low.

Translated magazines and concept magazines

The multinational magazines that are published in Finland represent two distinct types. One may be described as "translated magazines" and the other as "concept magazines".

Translated magazines are typically either focused on a specific and narrow subject area (such as hobby or handiwork magazines) or their coverage is more or less universal (such as popularized science magazines). - The bulk of comics published in Finland also come under this category of translated magazines.

Examples of translated magazines are provided by virtually all of Bonnier's publications in Finland. The editions published in different languages are more or less straight copies of one another. A case in point is the popularized science magazine Illustrered Videnkab, which apart from Denmark and Finland is also published in Norway, Sweden, France and Germany. All the editions are centrally edited, produced, marketed and distributed from Denmark. Engen (1991) provides a more detailed description of the production process.

Concept magazines, as the name implies, are based on an imported concept which is then adapted to the local market. The stories and items will be from the domestic scene, or treated from a domestic point of view. Aller's 7 päivää is a Danish magazine that is based on a Danish concept (Se og Hör) which has been adapted according to the tastes of the Finnish readership. The magazine is edited and put together in Finland, focusing on subjects of local interest. Another example of an "adapted" concept magazine is the Finnish version of ICA-kuriren (Kotivinkki). The version of ICA-kuriren that was later adapted for the Norwegian market has more in common with the Finnish Kotivinkki than original ICA-kuriren. In late 1992 the company also launched the magazine in Estonia, where it is called Kodukiri.

Inevitably, however, both the translated magazine and the concept magazine always collide with local peculiarities. The housewife who wants to try out a new recipe may find that some of the ingredients mentioned are not available in most shops in Finland; and the husband who is doing a home improvement job may find that the materials recommended in the DIY magazine are different from what he normally uses.

The problem is less straightforward and concrete in the case of the concept magazine, but there are several reasons why the concept may seem completely out of place on a national market without (and sometimes even with) careful editing. This is why the production and marketing of concept magazines requires a thorough familiarity with local cultural environment. One way to tackle this problem is through joint ventures and licence agreements.

Finnish publishing houses have also been engaged in the concept magazine markets. Amongst the biggest names Sanoma Yhtymä and Yhtyneet Kuvalehdet have been involved, acquiring the rights to publish in Finland foreign concepts for special-interest magazines. Some of the magazines have subsequently been turned into fully domestic, severing economic links with the original foreign hosts. Some other magazines have remained rather short-lived in Finland (e.g. Sanoma Group/Gruner+Jahr: Sandra; Yhtyneet Kuvalehdet/Reed International: Essentials).

The internationalization of the Finnish magazine business has been advancing on other fronts as well. Specialized magazines and trade journals in particular have close collaboration with foreign publications in the same field; examples are provided by contracts to exchange text and picture materials, news material pools and joint funding of equipment tests.

Until recently Finnish publishers have made no broad attempt to break into foreign magazine markets. The main exception here are the operations in Sweden by Helsinki Media/Sanoma Group. Sanoma Group now publishes three special interest magazines (Sköna dagar, Sy och sticka, Utemagasinet) in Sweden. Sköna Dagar (1994-) is the Swedish version of a Finnish magazine concept targeted for "grey panthers". The concept has been a real success in Finland.

Other examples of Finnish publications abroad include scientific and technological periodicals specifically targeted at the international community of experts (e.g. Graphic Arts in Finland). A further case in point is a magazine targeted for the Central European travel market (by a small Finnish publisher Polarlehdet Oy).

On the basis of the discussion above, the following main trends can be distinguished in the internationalization of the Finnish magazine business:

- Major Scandinavian publishers are breaking into Finnish markets.

- Finnish publishers have acquired rights of publication for foreign concepts or are operating in close collaboration with foreign magazines.

- Specialist magazines in Finland, particularly hobby magazines and trade journals, have close cooperation with their sister papers abroad.

- Finnish publishers on the foreign magazine markets concentrate on relatively narrow, clearly defined segments.

- Finnish publishers or foreign publishers operating through Finland are making early moves in an attempt to break into the unsettled Baltic markets. An example of the latter case is provided by Kodukiri, published in Estonia by Forma, a subsidiary of the Swedish ICA. One Estonian general-interest magazine, Elu Pilt (Picture of Life), is modelled on one of the most popural Finnish general interest magazines called Seura (by Yhtyneet Kuvalehdet Oy). Seura has provided help in starting up the new magazine, the layout is done by a Finnish professional, and the magazine is printed in Finland.

In conclusion

The print media in Finland have long enjoyed a protected status against foreign competition, the chief protective factors being related to language, culture, locality and immediacy. However, these strengths and assets are now beginning to cave in and perhaps even turn into a threat. On the other hand, it is always possible to try and translate threats into positive challenges and opportunities.

The Finnish language has afforded Finnish publishers a rather protected position. However, Finnish people today speak more foreign languages than ever before and accordingly read more and more foreign magazines and books. On the other hand, foreign people and Finnish expatriates can be regarded as potential readers for Finnish publishing products.

Local culture is another major asset for Finnish publishers: the readership in Finland is interested in what is happening in their immediate vicinity, in the everyday reality that affects their own lives. However, people's sphere of life is expanding; for instance, decisions in Brussels are an increasing concern for people in Finland as well. As Finland is now working to further intensify its links with Europe, it is very possible that there will be a growing market here for pan-European publications.

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Jyrki Jyrkiäinen

Media concentration, diversity and pluralism

Statistical reports on mass media and mass communication often contain very little, if any, data on the content of communication. The description of media contents involves various problems that have to do with the definition of concepts, with measurement and with the generalization of the results of measurement. The same applies to data describing the relationship between the concentration and content of mass communication.

In this article we will be looking at some of the research problems that are encountered in studies on the effects of mass media concentration upon the content of communication. Our attention is drawn to the links between concentration, diversity and pluralism. These concepts are also relevant to the day-to-day work of professional journalists as well as to the administration of the media sector, which is where decisions will be taken to control or restrict the ownership or market shares of different media in an attempt to contain the adverse effects of concentration. However, regulation is primarily a political measure which requires political decisions; it may be very hard to find scientific motivations.

In the discussion that follows my intention is to provide some new openings for a discussion on the concepts of diversity and pluralism and their evaluation, as well as on ways of increasing diversity and pluralism in connection with the theme of concentration.

Research results point in opposite directions

Widespread public concern about the adverse effects of the concentration of mass media and most particularly the printed press has inspired much debate and research on the issue. Concentration refers to the extent to which media businesses or media markets are controlled by the same owner. Where researchers or analysts have expressed concern about the fate of diversity or pluralism, the focus of attention has been specifically on *news media* and *news journalism.*

In studies concerned with the print media, the main concern has been with the impacts of concentration on the number of independent newspapers on the markets, with the growth of newspaper groups and chains especially in situations where the paper has remained in a monopoly position in its coverage area, and with the consequences of cross-ownership.

In the analysis of the effects of newspaper concentration on content, the main focus of attention has been on diversity and pluralism. The main underlying assumptions have been as follows (McQuail 1992, 115):

(1) The acquisition of a newspaper by a national chain or group diminishes its service of locally relevant news and opinion.

(2) Loss of a competing newspaper reduces the diversity of information and opinion available to readers in the area concerned.

(3) Transfer from independent to group status (or a move to monopoly status) diminishes the independence and editorial vigour of a newspaper.

The research results have pointed in two opposite directions. Some findings indicate that concentration adversely affects the quality of media contents; others suggest that the quality has improved with concentration. Dennis Hale (1991, 35) says that the majority of studies indicate that market structure has only limited impact: the advantages and drawbacks of concentration cancel each other out. Denis McQuail (1992, 116) argues that despite the amount and ingenuity of research, it has failed to establish clear general effects from monopoly conditions on the balance of costs and benefits in performance terms. Barry R. Litman (1992, 122), who has studied television programming, is on very similar lines and says that while on the surface there has been fairly common agreement and understanding of the nature of programme diversity, its actual measurement has varied so widely as has its hypothesized relationships to elements of market structure and consumer behaviour that it remains a confusing and misunderstood concept. In empirical studies of the impacts of content the main difficulty has been with testing and distinguishing all other factors that have a bearing on contents in addition to concentration.

Maxwell E. McCombs (1988, 136–137) compared the transformation of Montreal and Winnipeg into one-newspaper towns from a situation where they both had two newspapers owned by different groups. Content analysis before and after the monopoly position did not support the traditional assumption that newspaper competition guarantees diversity of content. McCombs concluded that the content of the daily newspaper is determined by professional perspectives on journalism and journalistic practices, not the presence or absence of competition. Competition does not in itself ensure diversity. Only a few changes from before to after the end of competition were found, and all of these were positive changes in the quality of the editorial product.

On the other hand, the study by Doris A. Candussi and James P. Winter (1988, 145) on the development of a one-newspaper situation in Winnipeg indicated that the increases in advertising rates and in single-copy prices were the most clearly visible changes brought about by the monopoly position: advertisers paid much more than they had before, and readers paid much more but got less for their money. The research by Candussi and Winter supports the view that the newspaper company which occupies a monopoly position within its region dictates the market conditions, but that has no benefits either to the advertiser or to the reader.

McCombs (1988, 136) argues that in the United States, antitrust legislation has not ensured the diversity of mass communication. However, John C. Busterna (1991) arrived at exactly the opposite conclusion in his comparison of 51 newspapers of the biggest chain in the United States (Gannett) with the same number of independent newspapers. The Gannet group charged a national advertising markup of about 10 per cent more than did the independent newspapers. In the smaller circulation group it fell to 6.2 percentage points, while rising to 15.8 points in the larger circulation group. The results supported the conclusion that well-organized newspaper chains are in the position to charge the prices they want. Busterna concludes that the results lend further support to the notion that antitrust legislation should be considered for use against the larger daily newspaper chains. Robert G. Picard (1988, 63) also found that monopoly papers have higher advertising rates than other papers.

David P. Demers and Daniel B. Wackman (1988) compared chain-owned and independent newspapers on the basis of their management goals. They found that editors of chain-owned papers were more likely to regard their organization as profit-driven than was the case among the editors of independent newspapers. However, there was no evidence that chain-owned papers are less interested in quality.

Dominic L. Lasorsa (1991) compared in an election situation people's views on public issues in one-newspaper communities as well as in communities where there was newspaper competition. There was far more diversity in public opinion in communities with newspaper competition: the difference compared with non-competitive communities was statistically significant. Lasorsa argues that newspaper competition remains very important for encouraging diversity of views on public issues.

As yet there has been comparatively little research on the homogenizing effects of group or chain ownership on news and editorial positions. In the United States, Akhavan-Majid et al. (1991) discovered that the Gannett chain had a homogenizing effect on the positions of group papers on controversial political issues. The research team compared the news reporting and editorial positions of 56 Gannett and 155 other newspapers on three issues that attracted wide publicity in the United States in 1989.

The research evidence on the effects of concentration on public-service broadcasting is even scarcer than that on newspapers. Most of the work that has been done on the impacts of concentration and competition on television programming comes from the United States. Joseph R. Dominick and Millard R. Pearce (1976) showed that the diversity of television programmes has continually declined at the same time as the programme structure and programme categories have become more homogenous. They refer to programme cycles in which broadcasters tend to duplicate existing formats rather than introduce new minority taste formats. Litman (1992, 126) feels that this sort of formulaic programming is the natural enemy of experimentation and innovation and by the same token of diversity.

In most Western European countries the values of diversity and pluralism in public-service broadcasting are safeguarded by legislation or expressly mentioned in the broadcaster's operating licence. The requirement of cultural diversity is quite routinely imposed upon public-service broadcasters, but in many countries the same obligations also apply to commercial television (see Pluralism and Media Concentration in the Internal Market 1992).

Udo Michael Krüger (1991) found that in Germany, the distance between public-service and commercial broadcasting is narrowing down. Nonetheless public broadcasters are still more closely bound to serious information and news programmes than commercial operators. Krüger asks whether eventually we will see the public and private broadcaster working together with each other within a sort of functional division of labour. This would mean less diversity and pluralism in television programming as a whole if both the public and private sector concentrated on those aspects of production that they knew best.

The dimensions of diversity and pluralism

The values of diversity and pluralism are deeply entrenched in Western notions of what represents modern society. Attributes typically associated with modern society include individuality, change, freedom of speech, and freedom of movement. The mass media are thought to play a significant role in democratic society.

In order that mass communication can fulfil its role in shaping and influencing private and public opinion and in contributing to democratic decision-making, the mass media system as a whole must offer cultural diversity and political pluralism to the extent that this is possible and necessary.

The diversity of communication involves many different dimensions, some of which have to do more with structural factors while others are more closely related to content and manner of presentation. Wolfgang Hoffman-Riem (1987) distinguishes the following four dimensions of diversity:

(1) diversity of formats and issues: referring to different formats (entertainment, information, education, etc.) as receiver;

(2) diversity of content: in relation to opinion and topics of information and news as receiver;

(3) diversity of individuals and groups: primarily access and representation as sender; and

(4) diversity of geographical coverage and relevance as receiver and sender.

McQuail (1992, 151-152) suggests that geographical diversity can be further divided into the following dimensions on the basis of structure and performance:

(4a) whether or not localities and regions are in fact served by their own media;

(4b) whether the local media system offers a real choice among channels;

(4c) whether there is, within channels, diversity of information, opinion and 'culture' adequate to local conditions especially in terms of the criteria of access and reflection mentioned above; and

(4d) whether regional and local media offer a service (alternative channels and content) sufficient to form an adequate substitute for national media (especially where these are not readily available); and

(4e) whether or not national media give due attention to different regions.

In addition we can identify at least five other aspects of diversity that can be taken into account (see Council of Europe 1992):

(5) diversity of ownership: access to ownership (licence granting policies);

(6) diversity of media channels: access to different (alternative, rival) media services;

(7) diversity of sources: quality and quantity of news sources as message sender;

(8) diversity of genders: access to receiver and sender;

(9) diversity of funding and support: public (licence fees, taxes) and private funding (advertising, sponsorship).

For purposes of policy decisions that have a bearing on the structure of communication markets, these different viewpoints and dimensions provide valuable insights for a more reliable evaluation of the diversity and pluralism of communication.

In addition, it is important to note that cooperation among communications industries is increasing both in volume and in value. Ad van Loon (1992, 111) notes that there is a strong tendency towards economic cooperation both at the regional and the international level. However, cooperation is often a first step towards mergers or takeovers, which reduce the number of media. An EC commission report on pluralism and media concentration (1992) observes that the effects of a media merger on pluralism must be evaluated "by reference to the environment in which it occurs. Mergers can have negative effects on pluralism, since they can limit the diversity of media controllers, one of the essential conditions for the diversity of information offered to the public" (Pluralism and Media Concentration in the Internal Market, 21).

It should also be pointed out that in situations where several media functions are economically concentrated for synergy benefits within the same communications company, concentration has normally also extended to the field of journalistic production. The obvious risk here is that the contents of different media that are controlled by the same company converge and become repetitive, effectively undermining regional or local diversity.

Diversity as a concept

The diversity of mass media should be considered from a pluralistic perspective; diversity should be defined from various different angles and it should be seen as a complex structure of options that is closely bound up with the use of communication at a certain point in time.

A distinction can be made, first of all, between the *extent* and *depth* of diversity. Extent has to do with the diversity of different types of journalistic stories, their formats and modes of representation at a certain point of media use. Depth has to do with variation in media contents within the same type of story, format and mode of representation at a certain point of use.

It follows that diversity should be defined (c.f. Council of Europe 1992) as an opportunity to make a free choice, at a certain point in time, between different types of journalistic stories, topics and events; between different sources of information, forms, representations, styles; between different opinions, values; between different journalists and perspectives, etc. Very briefly, diversity refers to the presence of culturally different types of material within the total space offered by the media.

If the serious intention is to promote diversity, it is crucially important that receivers or consumers are not denied access to that variation through economic or technical restrictions. For instance, where television programmes are made for small, select audiences (e.g. educational and arts programmes), heavy production costs must not be allowed to become a restrictive factor that eliminates producers.

It is an idealistic assumption that the individual consumer of communication is always willing or capable of taking full advantage of the diversity available on the market. Potential pluralism cannot be equated with actual, pragmatic pluralism. John C. Merrill (1984, 69-70), debating basic issues of mass communication in a book with Everette E. Dennis, points out that different levels of pluralism can be distinguished depending on the angle one wants to stress. He identifies four levels: 1) system level, 2) community level, 3) local level, and 4) message level. Merrill illustrates the differences by asking (1984, 70): "How does it really affect *me* here in my locality that *throughout the whole country* pluralism may be expanding. The diversity that I want is here and now (in *my* news media)."

Media choices are confined by a wide range of different factors: the way in which the communication system as a whole operates, the situation in which the media are used, the socio-economic situation of the receiver, the individual's psychological make-up, technological access to media, leisure and the amount of time spent with media, the social environment, personal interests and other circumstances. These factors tend to favour access to familiar contents, and by the same token familiar consumption patterns.

Pluralism as a concept

Pluralism is a specific manifestation of diversity. Pluralism is associated with the representation of social (and especially political) opinions, interests and values in the media.

In an ideal democratic system, every complex of opinion, interest and value should have access to the means that are required for self-expression in public debate (Curran 1991, 111). In reality, however, the chances are very limited. One restrictive factor is an economic system which does not provide access on an equal basis to the capital that is needed to voice opinions, particularly minority opinions. Technology may also impose certain restrictions (such as the scarcity of radio bands). Similarly, legislation and political majorities restrict opportunities.

As was observed earlier, the concentration and/or cooperation of media decrease the number of independent communications companies. In addition, the processes of societal differentiation, segmentation and decentralization all undermine the opportunities of important political actors and opinion formations to gain entry into the media and the field of public debate. As a consequence large numbers of actors and communities have to try and make clear their position in an ever smaller number of independent mass media. In democracy this sort of situation may be regarded as "normal" and "acceptable".

However, in some cases the situation is seen as a threat to adequate representation of the most important opinions, interests and values in the public debate. The attitude that working editors – editors involved in media production and in the debate on media production – take towards reducing this tension, is a factor of great importance here. Thus the evaluation of pluralism links up, in the final analysis, with human rights.

Obstacles to the diversity of news transmission

There is ample evidence from studies in the field of news transmission that intrinsic production factors (such as established journalistic practices, professional practices and modes of representation) have a greater impact on the final product than competition or concentration.

Schanne et al. (1989), in their studies of local radio programmes and local and national newspapers, found that media competition in the local market provided a greater amount of coverage of the same new items, but failed to provide greater diversity of local news. Newly established competitors struggled for their shares in the advertising and entertainment market, but they were unable to offer alternative views or news, a greater diversity of opinions or broader access to the media.

Dennis F. Hale (1991) compared the use of news services in independent and chain-owned newspapers. The two groups were identical in the total number of news services as well as in the number of major news services and prestige news services used. The only difference was that chain papers were more likely to subscribe to their organization's own news service.

Maxwell E. McCombs, Denis McQuail and others argue that homogeneity (as opposed to pluralism and diversity) of media content is due more to professional norms and to selection criteria in the newsrooms than to monopolistic, oligopolistic or competitive market structures. In addition to the above findings, we can sum up further evidence from journalism research. The factors that *promote the homogeneity of media content* could be summarized as follows (c.f. Council of Europe 1992):

(1) Common news transmission system. International and national news are transmitted by a handful of global news agencies. National and local news are transmitted by just one national news agency. Journalistic news sources are used throughout to a limited extent.

(2) The fairly narrow and confined structure of news topics directs the attention of journalists and by the same token the news content of the

media to simple geographical dimensions (local; national; global) and topics (politics; business; culture; sports).

(3) Journalists are dependent on the same influential institutions and interest groups in society.

(4) News criteria direct the attention of journalists and by the same token of the media to the decisions of (what are regarded as) the most important political actors at different levels of the political system in each country.

(5) News criteria direct the attention of journalists and by the same token of the media to certain topics such as death, madness, love, power, lack of power, drama, evil, passion, loss.

(6) Most media operate on markets with a wide range of different types of audiences that are stratified and differentiated in various different ways. The job of putting together a news package that satisfies the needs and interests of all these audiences often requires compromises in terms of opinion diversity as well as analyses based on the principle of the "least common denominator", which often means the goal of maximally high reception figures.

On the basis of the foregoing it seems that the chief problem in researching concentration and pluralism lies in the empirical testing of assumptions about the effects of ownership. The difficulty is due in part to the fact that decisions on content are often influenced by complex interrelated factors, which in turn means it is very hard to single out the impact of one particular factor (see Medieföretagsköp och mediekoncentration 1992, 86–88).

Denis McQuail (1992, 115) concludes that it is extremely difficult to demonstrate any direct link between ownership and content. The process between the two aspects is complex and influenced by more variables than can adequately be taken into account.

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Katarina Eskola & Tuomo Sauri

Changing patterns in reading habits[1]

Increase in book lending faster than increase in books bought

Together with Iceland, Denmark and Switzerland, Finland has long ranked among one of Europe's top book publishers in terms of titles published per capita (Statistical Yearbook, Unesco 1992).

In 1980, Finland published 14 book titles and in 1990 as many as 20 book titles per 10 000 population. Non-fiction has long been the biggest single category. In the 1980s around one in six new titles were classified as fiction. In 1991, total book production numbered 11 000 titles, of which 1 900 were fiction titles. (See Table 7.2 in the statistics section of this volume.)

Book distribution channels include both lending and purchasing. Finnish people are accustomed to buying their books in shops and through book clubs, as well as lending from libraries and friends. Large numbers of books are also bought for presents.

Following the trend established in earlier decades, book lending from public libraries in the 1980s increased at a faster rate than the number of books sold. Book sales showed a consistent pattern of growth in Finland after the war up until the 1980s, but since then the figures have remained more or less unchanged. During the 1990s the number of lendings from public libraries has continued to increase.

In 1981 members of the Finnish Book Publishers' Association (FBPA) sold a total of over 22 million books; the figure for 1991 was just over 23 million. At the same time the number of lendings from public libraries increased from 75 million to 89 million. In other words in 1981 there were three lendings per one purchased book; ten years later, the ratio was one purchase to four lendings. (See Tables 7.6 and 7.13.)

The FBPA statistics do not cover all sales through book clubs. During the 1980s the number of book clubs dropped from almost two dozen to just six. Nonetheless book clubs still account for an estimated one fifth of all sales in the category of general fiction (Sauri 1993).

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1) This article is based on material from the 1991 leisure survey by Statistics Finland (see Liikkanen & Pääkkönen 1994).

Reading is encouraged in many ways

The data available on book production, sales and lending indicate that Finnish people are avid readers. As we move towards the mid-1990s, there are no signs of any major change in this respect.

Book reading is easy and encouraged in various ways in Finland. One of the key factors is that book publishing, both by private and public publishers, has continued up until the present day at a very high level. Similarly, book distribution is well-organized through a dense network of public libraries as well as book shops, book clubs and mail order services.

Books are appreciated as having lasting value in Finland; they are definitely not regarded as throwaway products. The number of books that people had in their home libraries remained unchanged throughout the 1980s: both in the early 1980s and early 1990s, 60 per cent of the Finnish people had more than 50 books at home. One in four had more than 200 volumes in their home library. Larger collections consisting of over 500 or over 1 000 volumes were much rarer; most of the people with such libraries were people with a high level of education. In 1991, 28 per cent of the population with an academic degree had more than 500 books at home and 10 per cent had over 1 000 books.

In 1981 and 1991, one in ten people in Finland had bought books for themselves or for friends through a book club (the figure for 1981 was 13 % and for 1991 11 %).

During the 1980s the use of public library services increased in all age and sex groups. In 1991 about 60 per cent of all Finns aged 10 years or over and almost every person aged 10–14 years said they had been to the library during the past six months. Girls and women used library services to a greater extent than boys and men.

The use of library services was very common among people with high level of education. Still, active use of library services decreased among people with an academic degree. Both in 1981 and in 1991, eight out of ten people with an academic degree had been to the library during the past six months, but the proportion of those who had been to the library at least 10 times during the past six months dropped from 44 per cent to 35 per cent.

Another factor that is conducive to a favourable reading environment is that children get used to books from a very young age. Apart from the fact that parents are interested in books and buy books and lend them from the library, they also *read to their children.*

Reading to children is very common indeed in Finland. Both in 1981 and in 1991 almost 80 per cent of adults with children aged under 10 said that they had read books out loud to their children. Almost one third (29 %) had read to their children on a daily basis, and almost two in five (37 %) had read to their children at least once a week.

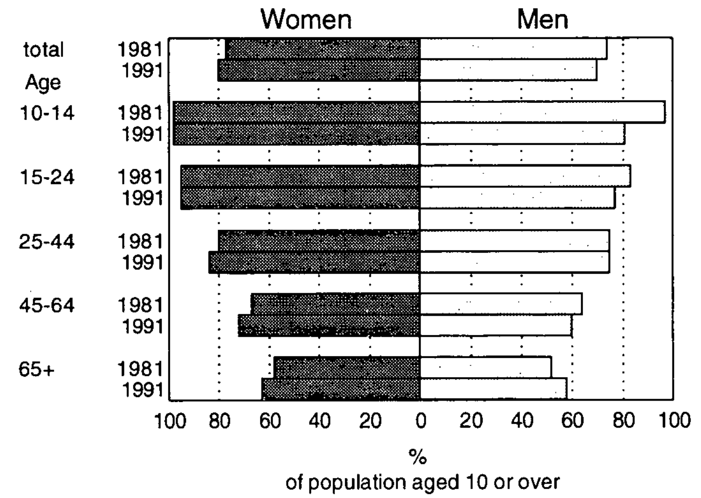
The favourable reading environment in Finland is no doubt one of the reasons why according to various international comparisons there is an exceptionally high level of literacy among children and young people in the country. The finding was confirmed by an evaluation study carried out in 1989–92, which involved 31 countries from different parts of the world (for more details, see Linnakylä 1992).

Number of titles read has dropped but reading is still common

The positive attitude of Finnish people towards written communication and literature is also reflected in their reading habits. Reading books has long been one of the favourite leisure activities in Finland, and it remained so during the 1980s even though there was some speculation in public debate that we might be seeing important changes in this regard.

Both in 1981 and in 1991, three quarters (76 % and 75 %, respectively) of the population aged 10 years or over had read at least one book during the *six months* preceding the interview (Figure 1). In 1991 four in five (82 %) had read at least one book during the previous *12 months*.

Figure 1.
Reading books during previous 6 months by sex and age in 1981 and 1991



Has read at least one book during previous six months

Source: Statistics Finland leisure survey 1991

The figures for book reading remain highest among children and adolescents. The results of longitudinal comparisons do not lend support to the persistent argument of increasing "neo-illiteracy" among children and young people.

However, the proportion of those who read a lot was slightly lower than ten years earlier. The number of active readers had declined most notably among young people.

In 1981 one in three (34 %) and in 1991 one in four (26 %) Finns aged 10 years or over had read at least ten books during the past six months. In the early 1980s almost two in three (62 %) children in the age group 10–14 years had read at least ten books during the past six months; by the early 1990s the figures had dropped to 38 per cent.

Among boys and young men the decline in the proportion of active readers was even sharper than in the case of girls and young women, for whom the figure was higher to start with.

The results on the lowered level of interest among boys and young men in reading books are consistent with the time use studies conducted over the past decades by Statistics Finland. In 1987, young people spent less time reading books and newspapers than they did in 1979. The decline was sharpest among young men aged 20–24 years, but the same trend was clearly in evidence in all other age groups as well (Niemi & Pääkkönen 1990; Liikkanen 1990). However, it is important to bear in mind that in spite of the shortening of reading times young people still spend about 40 minutes reading every day.

One possible explanation for the lowered interest in book reading among boys and young men is provided by the rapid growth of audiovisual communication and new information technology (computers and computer games; for more details, see Liikkanen in this volume).

Non-fiction and fiction equally popular

There have been no dramatic changes during the 1980s in the type of books that people read in Finland. However, it may be argued (with some reservations) that the growth of computer technology and the increase in the production of non-fiction titles has been reflected in slight changes in the popularity of different genres of literature.

In the non-fiction category the popularity of certain types of books remained unchanged or even increased, but at the same time certain others saw their popularity decline. In the fiction category no genre increased in popularity. There was no change in the number of poetry titles read, but in many other classes the figures declined slightly or somewhat.

The reading of books related to one's job or studies was at more or less the same level in 1991 as it was ten years earlier, while the reading of other non-fiction titles as well as miscellaneous other books increased. As a result of the increased share of readers of non-fiction books, the reading of this type of literature in 1991 was rather equally common as the reading of novels, which had been read by one in three (33 %) Finns aged 10 or over during the past six months.

Overall it seems that the 1991 interview data do not lend support to the view that culture is becoming less serious and more entertainment-oriented. For instance, the reading of serials in 1991 was at the same level as the reading of verse and plays. What is more, the popularity of light series declined in all population groups during the 1980s.

Likewise, the popularity of other types of light reading, such as crime and thrillers, books on war and love stories, dropped by a few percentage points. The proportion of readers of children's books dropped more, i.e. from 28 to 18 per cent.

Groups distinguished by their attitudes towards foreign fiction

In recent decades the number of fiction titles published in Finland by foreign authors has consistently exceeded the number of books by Finnish authors. It also seems that Finnish readers are beginning to find new favourites amongst foreign authors.

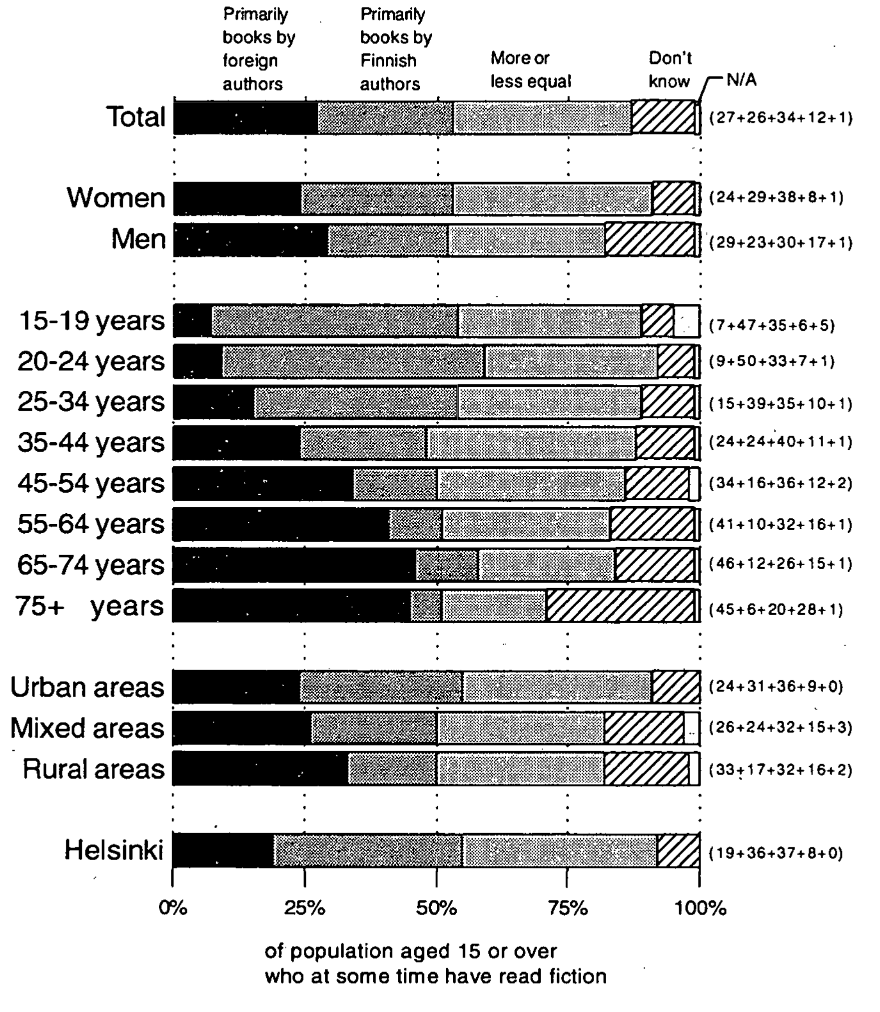
The majority of the favourite fiction titles listed by the interviewees in 1991 were of foreign origin. In this regard the situation has clearly changed since 1973, when less than half of the favourite titles mentioned by the adult population were of foreign origin; and since 1984, when just under half of the favourite books of politicians, cultural elites and library users came from abroad (Eskola & Linko 1986; Eskola 1990).

In a global perspective the books that were read in Finland in the early 1990s still came from a rather small cultural and linguistic area. As was the case in the 1980s (cf. Eskola 1992; 1993), the favourite translations in Finland came primarily from the Anglo-American area.

Attitudes towards Finnish and foreign literature seemed to divide people into different groups. The reading of titles by foreign authors was most common in the younger age groups, in urban areas and among those with a higher level of education. In terms of occupational groups the two opposite poles in this comparison were represented by students who showed a heavy orientation towards foreign authors, and on the other hand farmers who favoured Finnish writers. Women liked to read foreign authors somewhat more often than men. (Figure 2.)

It seems that the reading of foreign fiction has to do with the level of modernity in society: the reading of foreign authors increased in direct proportion to the level of modernity of the reader category.

Figure 2.
Reading titles of Finnish and foreign authors by age and place of residence in 1991



Source: Statistics Finland leisure survey 1991

Author's gender a significant factor for men

On the basis of the authorship of book titles available in Finland, the expectation was that people in Finland read more books written by men than by women.

However, men and women readers take a different attitude towards the works by authors of their own and the opposite sex. According to the results of earlier studies (see Eskola 1990), it is more common for women to read books both by men and by women.

Among women there was a markedly larger proportion of readers who said they were equally interested in books written by men and women. Over half of the women (57 %) and less than one third of the men (31 %) said they read more or less the same number of book titles by men and women authors.

Almost every other (47 %) man said he primarily read books written by men. Among women, one in five (22 %) said they primarily read books written by women.

The greater openness of women with regard to the author's gender was evident in all age groups. However, there were also certain groups amongst women who were clearly more "masculine" in their choices and preferences than others: these included women with a higher level of education, upper white-collar employees, and women living in the metropolitan Helsinki region. In these mainstream groups it was slightly more common for women primarily to read books written by men.

Newspapers and magazines a strong sector

Finland has a very strong newspaper and magazine sector: the number of newspaper titles, circulation figures and coverages are all at a very high level. In 1992, a total of 242 newspapers were published in Finland; the figures for Sweden and Denmark in 1990, for example, were 170 and 45, respectively (Gustafsson 1992).

In terms of dailies' circulations relative to population, Finland has traditionally ranked among the top countries in the whole world, even though that ranking has slightly dropped in recent years with the declining total circulation of newspapers (World Press Trends 1993).

A wide range of magazines and periodicals are published in Finland. Depending on the criteria applied, the figure is between 2 500 and 4 500 titles. According to the statistics of the Post Office and Rautakirja Oy, the total volume of magazines and periodicals (= circulation multiplied by the frequency of publication) published in Finland was around 370 million copies in 1993. (See Tables 9.6 and 9.7.)

Newspapers have plenty of readers

People read their newspapers very regularly in Finland. With the exception of the youngest age group in the leisure survey (10–14 years), almost all people read newspapers regularly regardless of age and population group. This has been the case for quite some while. (For newspaper reading in Finland during the 1960s and 1970s, see e.g. Littunen & Sinkko 1975.) The changes that have happened during the past ten years (from 1981 to 1991) have also been quite minor.

Newspapers are here divided into two groups: those appearing 7–3 times a week (dailies) and those appearing 2–1 times a week (non-dailies). The latter group consists typically of local newspapers appearing in smaller rural areas. The survey also measured the frequency of reading free sheets.

The vast majority or 94 per cent of the population aged 15 or over were regular readers of at least one newspaper appearing 7–3 times a week. Exactly half of the population read two or more newspapers regularly. The number of regular readers is at the same level as ten years previously: 96 per cent of the respondents in 1981 said they read newspapers appearing 7–3 times a week on a regular basis.

Most newspapers that appear 2–1 times a week are local newspapers that typically operate in small rural districts even though they do have readers outside their main coverage areas as well as in larger towns. (See Paikallislehti 2000, 1991.) The frequency of reading local newspapers is inversely related to age; that is, average frequencies tend to increase in older age groups. All in all about one third (34 %) of the Finnish people are regular readers of local papers (in the vast majority of cases just one).

By contrast, the reading of free sheets is far more common in urban areas than it is in rural areas. On the other hand, regular reading of free sheets is considerably less common in the Helsinki metropolitan area (49 %) than in urban areas on average (61 %).

Regular newspaper reading usually means reading on a daily basis. 94 per cent of the population aged 15 or over read their newspaper or newspapers on a daily basis or several times a week (daily 85 %, several times a week 9 %). In the age group 10–14 years 65 per cent read newspapers daily or several times a week; the figure for those aged 15–19 years was considerably higher at 86 per cent.

Young people and newspapers

The numbers of regular newspaper readers are roughly the same in different population groups and in urban and rural areas; overall regular newspaper reading is so common in Finland that an analysis of reading habits by population groups is a more or less futile exercise. However, there is one exception to the rule; differences between age groups and, particularly, reading among young people.

In recent years there has been much public concern about the lack of interest on the part of young people in newspapers, and some studies have been published which indicate such a trend. However, the results of our leisure survey give a somewhat different picture. According to these findings the proportion of regular young readers of dailies has remained unchanged at the same level as in the early 1980s. In other words some three fourths of the population aged 10–14 in the early 1990s were regular readers, the same figure as recorded ten years previously. In the age group 15–19 years, regular readers number about nine in ten (91 % in 1981 and 88 % in 1991).

The following observations also attest to the importance that is attached to the printed word, in spite of the prevalence of what is described as an emphatically audiovisual culture: The respondents in the 1991 leisure survey were presented with a list of leisure pursuits and hobbies which in addition to physical exercise, sports, outdoor recreation, and art exhibitions included television viewing, listening to the radio, reading newspapers and reading books. They were asked to say which of these activities were important to them and which did not really matter.

In the age group 15–19 years 82 per cent said that reading the newspapers was very or rather important; the figure for television viewing was 73 per cent, for radio 56 per cent and for literature 44 per cent.

In the entire population aged 15 years or over, the lead of newspapers is even clearer. Nine out of ten (91 %) said that reading newspapers was very or rather important to them. The only other item reaching the same sort of score was outdoor recreation. Two thirds regarded television viewing (66 %) and listening to the radio (66 %) as very or rather important, while 45 per cent said that literature was important to them.

In the magazine sector, too, we find that virtually "everyone" reads magazines. However, there is greater differentiation here than in the case of newspapers. The following discussion concentrates on regular reading of magazines and on the changes that have taken place in magazine reading by referring to figures describing "monthly readers" and "weekly readers" ("reads a magazine/magazines at least once a month/once a week").

Measured in terms of the proportion of monthly readers, the total coverage of magazines has slightly increased since the early 1980s. In 1981 monthly readers numbered 93 per cent of the population aged 15 or over, while the figure for 1991 was 97 per cent; those reading less frequently than once a month but at least once a year only add one percent to the figure. (Figure 3.)

On the other hand, the average frequency of reading magazines has clearly declined over the past ten years. In 1991 the proportion of those who read magazines at least once a week was ten percentage points lower than in the early 1980s: the exact figures were 79 per cent in 1981 and 70 per cent in 1991 (Figure 4). The numbers of weekly readers have systematically dropped in all age groups and social classes. The most dramatic change has occurred among young people aged under 20: in the age group 15–19 years the decrease amounts to around 15 percentage points and in the age group 10–14 years around 20 percentage points.

The decrease in the proportion of weekly readers is probably due at least in part to the clear shift that has taken place from general-interest and family magazines and from women's magazines (most of which appear once a week) to magazines that typically come out once a month or less frequently (mainly special-interest and hobby magazines). In particular, the reading of special interest and hobby magazines has clearly increased. The decline in the frequency of magazine reading has been most dramatic in the youngest age groups.

In the category of *general-interest and family magazines* and *customer magazines* (the customer magazines are published and paid by large business enterprises and delivered to customers free of charge), the proportion of monthly readers in 1991 stood at 91 per cent, somewhat higher than the figure recorded in 1981 (86 %). By contrast, the number describing weekly readers has dropped in ten years by an average 15 percentage points (from 64 % in 1981 to 49 % in 1991). Among upper white-collar employees and students, the decrease has been over 20 percentage points. The most faithful weekly readers of general-interest magazines are farmers, blue-collar workers and pensioners.

Figure 3.
Reading magazines by type of magazines in 1981 and 1991: monthly readers (= reads at least once a month)

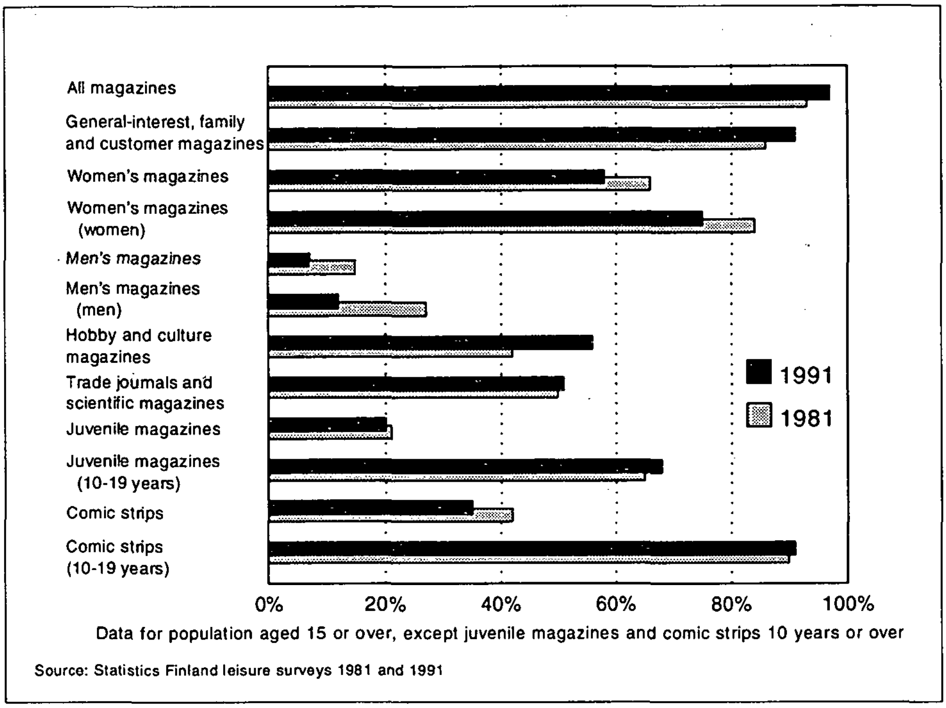
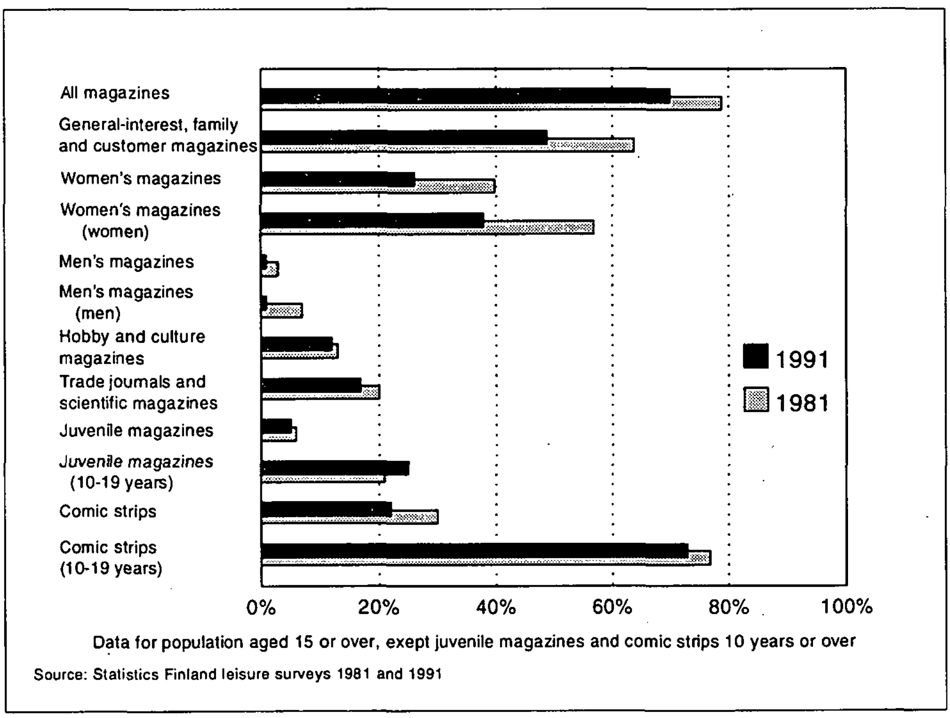


Figure 4.
Reading magazines by type of magazines in 1981 and 1991: weekly readers (= reads at least once a week)



The 1991 survey also measured the reading of general-interest and family magazines separately, without customer magazines. The results indicated that three in four people (77 %) read general-interest and magazine papers at least once a month and just under half (45 %) at least once a week. One in ten said they never read these magazines.

Three in four ~~of the~~ respondents (74 %) said they read customer magazines at least once a month, but only one in ten (9 %) read them weekly. The number of regular readers of customer magazines is above average among lower white-collar employees, service workers and farmers. More than one in ten Finns never read customer magazines.

According to the survey results both the monthly and the weekly reading of *women's magazines* has decreased; the figures have dropped most dramatically for the numbers of weekly readers. In the population aged 15 or over, only 26 per cent say they read women's magazines at least once a week, while the figure ten years earlier was 40 per cent. Among women only 38 per cent were weekly readers of their "own" magazines; in the early 1980s the figure was markedly higher at 57 per cent. The proportion of weekly readers is slightly above average among female lower white-collar employees and among self-employed women, but even here the figures have actually come down.

In the early 1980s almost one quarter of the male population in Finland (23 %) were weekly readers of women's magazines; the figure has now dropped by half to 12 per cent.

Hobby magazines have large numbers of new readers

The readership of *hobby and special interest magazines* (also included in this category were culture and arts magazines) has increased very clearly over the past decade. While the number of weekly readers has remained more or less unchanged at just over 10 per cent, the number of monthly readers has increased from 42 to 56 per cent. The reading of these magazines and the growth in readership rates are concentrated in the younger age groups: among those aged 15–44 years, over 70 per read hobby and culture magazines at least once a month.

The proportions of regular readers have increased in their traditional reader groups, i.e. among white-collar employees and students, but even more so among (by around 20–30 per cent units) entrepreneurs and blue-collar workers.

The reading of *trade and business magazines* (which in this classification also includes scientific journals) is roughly at the same level as it was ten years previously. The number of monthly readers is also unchanged at around half of the population aged 15 years or over. The proportion of weekly readers has slightly decreased over the past ten years and now stands now at less than one fifth. This seems to be due to the fact that men read trade magazines less frequently than before. In 1991 the number of weekly readers among men was down to 20 per cent (from 27 % in 1981). Among women there have been no changes in the reading of trade and business magazines. Approximately one in ten women are weekly readers of trade journals or scientific magazines.

Monthly readers of *culture and arts magazines* number less than one in ten of the population aged 15 or over; the proportion of weekly readers was just one per cent. The most typical monthly reader of culture magazines is (not surprisingly) an upper white-collar employee, but as a general rule there appear no clear differences here between social groups. With the exception of farmers and pensioners, arts and culture enthusiasts are more or less evenly divided across all social groups, accounting for around 10 per cent in each group. It is perhaps surprising to find that there are no differences in this category between the number of regular male and female readers.

Effects of computer games and video: the popularity of action series and sex magazines has collapsed

Children and adolescents are obviously the biggest single category of *comic magazine* readers, but the number of monthly readers is still fairly high at almost one third (30 %) even in the age group 35–44 years. In the age group 10–14 years 85 per cent and in the age group 15–19 years 60 per cent are weekly readers.

These figure are all quite high, but even so it seems that the popularity of certain types of come strips has collapsed. For instance, in the age group 10–14 years the proportion of children reading adventure/action comics has dropped from two thirds (65 %) to less than one fifth (18 %) in ten years. Videos and computer games are no doubt the main explanation here.

In Finland Walt Disney is by far the most popular comic strip name in all age groups.

Men's magazines have also lost substantial numbers of readers to the video. In the early 1980s about one in four Finnish men were monthly readers, in the early 1990s only one in eight. The proportion of weekly readers is down to one per cent of the male population. The category of men's magazines in Finland consists almost exclusively of sex magazines. The main reason for the decline of this magazine sector is no doubt the growth of the sex video markets.

Judging by the figures presented above, it seems that there have been only minor changes during the 1980s in book and magazine reading as well as in the popularity of different types of books in general and in different population groups. It would seem that the most noticeable changes have taken place in magazine readerships.

In the early 1990s Finnish people still believed in the printed word, in newspapers and books. Even in multimedia society, book and magazine reading remains quite common. People buy books, keep them in their bookshelves, lend books from the library, and read books to their children.

Book reading was just as common as ten years previously. Books remained important means of communication most particularly for people with a high level of education. Accordingly reading was more common among young people than in older generations. Girls and women stood apart more clearly than before from boys and men as active and avid readers.

In spite of the rather dramatic changes in the Finnish media environment during the 1980s, literary culture has managed to hold its own. The technological innovations that we saw during the past decade have changed most notably the organization of electronic media in Finland. (See Sauri 1993.)

The innovations in communication technology have primarily affected the everyday life of young people. According to the results of the 1991 leisure survey, daily television viewing in the age group 20–24 years increased to a greater extent than in any other age group. Boys and young men took a greater interest than any other group in audiovisual technology and in the new avenues for participation it offered, such as computers and computer games. (See Liikkanen, in this volume.)

However, it would seem that audiovisual communication has directly affected the number of readers in only two categories, i.e. action comics and men's magazines.

The data we have on reading, its prevalence and its general orientation indicate that books and book culture represent an important form of "cultural capital" in Finland. What is more, it is an asset that does not strictly separate user groups from each other. It seems that the class boundaries in reading have to some extent been dissolved.

Overall it seems that Finnish people take a very positive attitude towards written communication, whether that is in the form of reading newspapers, reading books and following the literary scene, or writing.

Nine out of ten (91 %) said that reading newspapers was very or rather important to them. The only other item reaching the same sort of score was outdoor recreation. Two thirds regarded television viewing (66 %) and listening to the radio (66 %) as very or rather important, while 45 per cent said that literature was important to them.

If we look at the numbers regarding different forms of communication as *very* important, the key role of newspapers is further emphasized. Four in ten (41 %) of the respondents said that reading newspapers was very important to them. The figures were markedly lower for television viewing (14 %), listening to the radio (14 %) and literature (11 %).

Although newspapers were a more integral part of people's everyday life than were books, both were regarded as very important in all population strata and in all age groups. All groups of respondents considered reading newspapers as important. Literature was described as important most particularly by women and people with a high level of education.

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Mirja Liikkanen

Electronic media in household use[1]

This article is concerned with the reception and household use of electronic media: television, video, radio and home computers. These media share one important distinctive characteristic: "...they provide actively, interactively or passively links between households and individual members of households with the world beyond their front door" (Silverstone et al. 1992, 15). In this sense these media form part of both private and public culture. The relationship between the public and private is mediated by technology. Falling as it does within the private domain, the use of media technology is also an integral part of family structures, family dynamics and the exercise of power within the family.

Silverstone argues that the relationship between communication technology and family life and the household must be understood as a relationship between two social and cultural systems, neither of which determines the other (Silverstone 1993, 285). The use of media technology at home provides a ritual structure to the everyday and causes public time to flow into private time. Media contents are important topics of everyday conversation; people adopt those contents, their priorities and interpretations, argue against them and present their own counter-interpretations. The media provide entertainment, they mediate family quarrels, differentiate world-views. But they are also breaking loose from within the home. On the other hand the media are increasingly intertwined in an intertextual relationship, replacing or complementing one another.

Another reason why the media discussed here may be described as domestic technologies is that as more and more people have gained access and as the technology itself has continued to develop, people have been spending more and more of their out-of-work time and leisure within the four walls of their home. Social researchers have described this development as a tendency towards privatization. At the same time, leisure activities outside the home have been steadily declining during the past few decades, not just in Finland but throughout the Western world. (See e.g. Morley 1992.)

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1) This article is based on material from the 1991 leisure survey by Statistics Finland (see Liikkanen & Pääkkönen 1994).

Television viewing has become more commonplace

During the 1980s the field of electronic mass communication saw some very important changes in Finland. Amongst the key indicators of the changes that have happened in television culture, reference has been made to the fact that people now have much more freedom of choice. At the same time, the role of public-service broadcasting has tended to decrease.

Ownership of television sets continued to increase in the population throughout the 1980s. By 1991, almost all people in the country (97 %) had a television set in their household. The proportion of those who did not have a television was highest in the population 75 or over, but even here the figure was no more than 10 per cent.

During the years of relative prosperity in the 1980s, the number of second television sets in Finnish households increased quite considerably, as did the number of remote controls. According to the results of the leisure survey over 40 per cent of the population have more than one television set; 70 per cent have a remote control; and over 90 per cent have colour television. All in all the wave of modern home electronics has swept across the country with considerable rapidity: during the 1980s large numbers have bought not only the latest television models but also VCRs, home computers, better sound reproduction systems, etc.

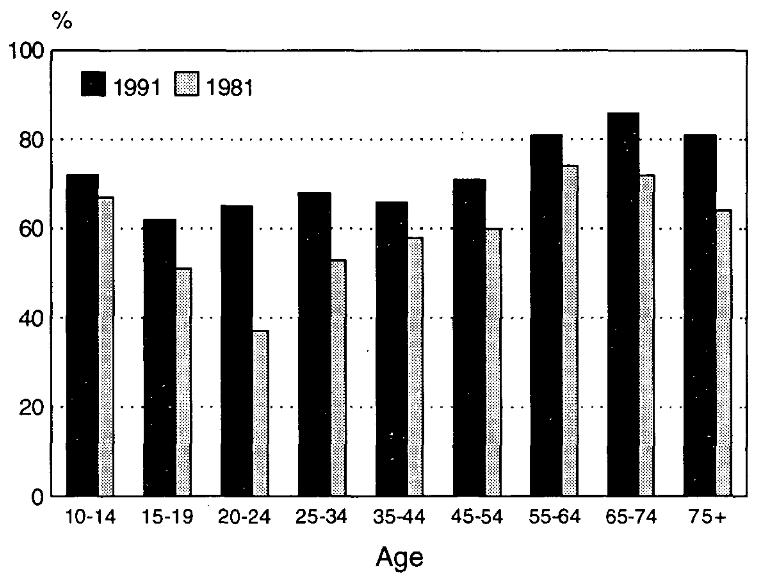
Earlier evidence from time usage studies indicates that television viewing increased in Finland during the 1980s (Liikkanen 1990, 17). According to recent peoplemeter studies the amount of time that people spend with television has further increased in the 1990s (see Media statistics, section 2, in this volume). These results are also consistent with the findings of the 1991 leisure survey where the focus of analysis was on the frequency of viewing and on the family's viewing habits. The increase in television viewing is explained by general cultural changes as well as by the slight increase in leisure time and by the sharp increase in programming volumes and the number of television channels (Liikkanen 1994a).

Television viewing is by now very much an everyday activity in Finland. Over 90 per cent of the respondents said that their family watches television every day; in families with children under 15, the figure approximates 100 per cent. The television is kept switched on all evening more and more often, even though the majority still switch it off in-between the programmes they are watching. In particular, upper and lower white-collar employees, distribution and service workers, as well as students and schoolchildren said more often than before that they keep the television switched on all evening. While the figures have declined somewhat in certain occupational groups (such as farmers and other self-employed groups), differences in television viewing habits between social groups have clearly been narrowing down.

"All evening" obviously means different things in different families. According to the qualitative pilot studies conducted for the leisure survey, some families switch on in the afternoon; for others the evening begins at eight-thirty and the main news. For some people the evening begins when they have finished all their household chores; for others when they come home from work. In other words the definitions tend to vary depending on the family's rhythm of life and their employment situation. However, in terms of viewing habits the change that has happened is an indication that people are now making less conscious television choices. Instead the television is moving into the background, or as some scholars have described it, flowing into the wallpaper; people pay more or less attention to television during the evening, depending on what's happening on the "moving wallpaper" (see Kytömäki & Savinen 1993).

The increase in the frequency of television viewing is very clear. While in 1981 less than 60 per cent of the population watched the television on a daily basis, the figure ten years later in 1991 was over 70 per cent. Daily viewing is still somewhat less common among women than men. On the other hand, the increase over the past ten years has been sharper among women. The increase in the proportion of daily viewers is seen in all age groups. (Figure 1.)

Figure 1.
Daily television viewing by age groups in 1981 and 1991



Source: Statistics Finland leisure surveys 1981 and 1991

However, by far the most dramatic increase has occurred in the age group 20–24 years, where the proportion of daily viewers has increased by almost 30 percentage points. In the early 1980s young people in this age group still showed the lowest television viewing rates. This points at a very profound change in youth culture, where the electronic image occupies a far more central place than before. There is also reason to suspect that the sharp increase in youth unemployment levels is a factor in this development.

So during the past ten years, the differences between women and men in the frequency of television viewing have clearly narrowed down. The differences between social groups are also rather small, although the proportion of daily viewers is somewhat higher among the unemployed and pensioners.

Frequencies of television viewing are highest in the oldest age groups, starting from age 55. These people also consider television viewing as more important than others. In younger age groups, too, relatively large numbers describe television viewing as very important. Although women now watch more television than ten years earlier, there are fewer women than men in all age groups who consider television very important.

Video has become part of television viewing

Video made a very impressive breakthrough during the 1980s. In 1981, it was still virtually non-existent in Finnish households; ten years later in 1991, over 60 per cent of the population aged 10 or over had their own VCR. The rate of growth exceeded all expectations. VCR ownership increases towards younger age groups; in the households of people aged 65 or over, it is comparatively rare.

From the very outset the principal use of the VCR has been for timeshift purposes, i.e. recording television programmes for viewing at a later, more suitable time. Studies on VCR use in the 1980s (see Media statistics, section 5, in this volume; Samola 1990) showed a consistent increase in the use of video for timeshift purposes. Now, as households have become more accustomed to using VCRs and as television is showing more feature films than before, programmes are increasingly recorded for more permanent use. This is reported as the primary use by around 10 per cent of VCR owners. The use of VCR for timeshift purposes has accordingly decreased somewhat.

The viewing of rental videos is clearly on the decline. Today, some 10 per cent of all VCR owners report this as the most important use, even though the viewing of sell-through videos was included. Recent reports indicate that the market share of sell-through videos has been increasing (Nyman 1992; Sauri 1993). Although neither sell-through nor rental videos are very popular, the majority or 60 per cent of VCR owners have at least sometimes rented video programmes. People have less experience of other ways of acquiring video programmes. Less than one third of the respondents had ever bought a recorded video cassette, and just over one in ten had borrowed a video from the library.

In the whole population less than one fifth watch videos at least a few times a week, and over one third at least once a week (it is important to bear in mind here that 40 per cent of the population do not have a VCR). Clearly then we may conclude that the viewing of videos is rather common, and that the use of VCR has become an integral part of everyday television viewing in Finland. Not surprisingly, the youngest viewers in the age group under 15 are most accustomed to using the VCR; about half of the respondents in this age group said they watched videos at least a few times a week. In general the frequency of watching videos increases in younger age groups.

Home computers: new electronic images at home

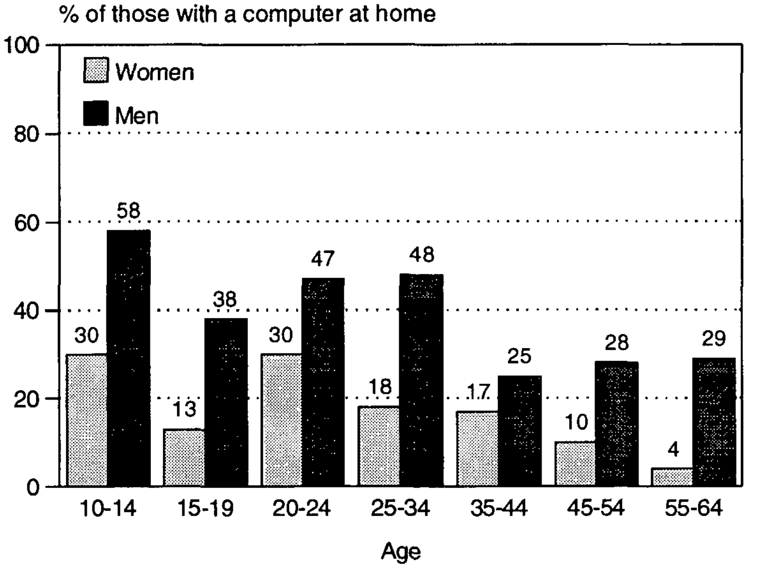
A relative newcomer to domestic technologies is the personal or home computer, which like the VCR has been spreading very quickly in Finnish households. One in four respondents said they had a computer at home. Computer ownership increases very sharply towards younger age groups: in the age group 10–14 years 60 per cent said they had a computer at home; in the age group 15–19 years the figure was under 50 per cent; and in the age group over 60 only one per cent.

Young people are by far the most frequent computer users. In the age group 10–14 years only three per cent say that they do not use the computer at all. Around 30 per cent use their computer on a daily basis and almost half at least a few times a week. Computer use by boys is far more intensive than in the case of girls. Among boys in the youngest age group, for example, almost two in five say that they use the computer on a daily basis, and almost 60 per cent use the computer several times a week; the figures for girls are 17 and 30 per cent, respectively. (Figure 2.)

Home computers are primarily used for playing computer games; over half of all computer owners say that they spend most of their time on the computer playing games. Although playing is most common in the youngest age groups (94 per cent), it is relatively common in other age groups as well.

The second most common use of the home computer is for word processing, which is mentioned by around 40 per cent of the respondents. The highest figures are reported in the age group 20–34 years. Word processing is followed by computer graphics applications and programming.

Figure 2.
Use of home computer on several days a week by age group



Source: Statistics Finland leisure survey 1991

Computer games provide the main link between computer use and other types of electronic image and other forms of culture. For example, a computer game may introduce the user to a film or a novel, or spark his or her interest in a whole new subject area; the link may also work the other way round so that people learn about a computer game through television or a video. Computer use thus forms an integral part of changing television and video viewing habits. At the same time, by creating a stronger sense of mastering technology, computers have served to make television viewing a more everyday activity.

Favourite programmes on television

A recurring argument in recent social research is that traditional value and class hierarchies are increasingly giving way to other means of social identity and social distinction, notably to choices that have to do with the media (e.g. Laermans 1992; Featherstone 1991). At the same time, it has been argued that in order to understand television viewing, for instance, we need to look at how that is connected with everyday practices and with power relations within the home and the family (Morley & Silverstone 1990, 33; Morley 1992, 139). A further point is that television programming today shows greater openness than before to viewer interpretations: it is said that television programming is created and that its meanings are interpreted by active viewers in their own living rooms (e.g. Fiske 1987).

The meaning of television to individual viewers and to different social groups can be studied in many different ways. In the leisure survey the approach adopted was to look at favourite and rejected programmes. The respondents were asked to describe in their own words what kind of programmes or types of programmes they liked to watch most (favourite programmes); and the programmes or types of programmes they would never like to watch (rejected programmes). The question was directed to the entire population aged 10 or over.

The data on favourite programmes indicate that people consider and analyse television programming from the television audience's vantage-point. They talk about their favourite programmes mainly in terms of genres or by reference to specific programmes; their accounts come very close to the expressions created by the broadcaster or producer. It is less usual for people to define programmes by direct reference to their own everyday life; emotional expressions (as was the case with favourite music) are also uncommon (see Seppänen 1994). The most personal, private comments have to do with the viewing situation (Saturday evening, late-night shows).

However, accounts on different types of programming differ from each other in terms of the accuracy of references to the genre concerned, or in terms of how frequently people mention the names of individual programmes. References to the quality of programming are typically of a rather general nature, such as "good films" or "good entertainment". On the other hand, references to the viewing situation may also be interpreted as descriptions of quality; the experienced quality of a television programme has importantly to do not only with its content but also with the viewing situation (Kytömäki & Savinen 1993).

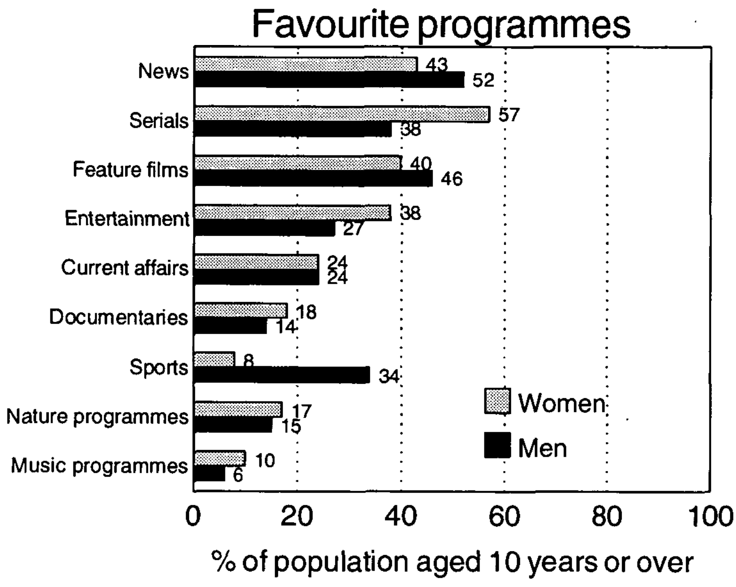
The following emerged as the main types of television programme that were mentioned in descriptions of favourite programming: serials, newscasts, documentaries & current affairs, feature films, entertainment, sports and nature programmes. The number of specific references to individual programmes is highest in the categories of serials and entertainment, which is also seen in the list below on the top ten television favourites:

Favourite types of television programmes in 1991	Top ten television favourites	No. of times mentioned
1. serials	1. Napakymppi (dating)	460
2. news	2. Dallas	219
3. feature films	3. Jake and the Fatman	213
4. entertainment	4. Ruutuässä/Ruutuysi (quiz)	206
5. current affairs	5. Kymppitonni (quiz)	189
6. sports	6. Dynasty	166
7. documentaries	7. Twin Peaks	150
8. nature programmes	8. Ruusun aika (family soap)	148
	9. A-studio (current affairs)	131
	10. Hynttyyt yhteen (comedy)	118

Studies of television viewing have often stressed that this is an activity which is closely bound up with everyday structures and routines; television viewing is serialized, ritualized, highly repetitive (e.g. Morley 1992). It has also been found that people tend to link up different types of programmes with their own weekly rhythm: for instance, news go together with weekdays and feature films and entertainment with weekends (Kytömäki & Savinen 1993). It is no surprise then that people's favourite programmes are usually those that are the most "television-like" and at once the programmes that often have the highest viewer ratings. Favourite programmes are those that in one way or another are associated with enjoyable viewing experiences, that are most tightly bound up with the rhythm of everyday life, that are repeated so that you can expect to see them in the future as well. A pleasant viewing experience may be related not only to contents but also to the choice being easy as far as the rhythm of everyday life is concerned, or to the programme occupying a festive slot in the everyday. It follows that individual point programmes are very rarely mentioned among favourite television programmes.

In brief then, analysis of the 1991 data points at fairly consistent patterns and at a heavy accumulation in favourite television programmes (in contrast to the situation with music preferences; see Seppänen 1994). On the other hand it is useful to bear in mind that although half of the respondents have singled out a certain type of programme as their favourite, the other half have not.

Figure 3.
Types of programmes most frequently mentioned as favourites



Source: Statistics Finland leisure survey 1991

Serials came second after the news on the list of favourite television programmes. Almost half of the respondents mentioned serials as their favourite programmes, women far more often (60 %) than men (40 %). In other words, serials are experienced as having greater personal importance by women viewers. This difference is seen in all age groups, but the number of women who mention serials as their favourites increases linearly towards the younger age groups.

Combining the shares of television news, current affairs programmes and documentaries, this is the category that comes out as the top favourite. News alone are equally popular as serials, i.e. half of the respondents mention them as their favourite programme. The figure is even higher if only the population aged 15 or over is included; only five per cent in the age group under 15 mentioned the news. Men mentioned the news more often than women. However, in the age group under 35 there is no significant difference between men and women in how often they mention the news as their favourite programme. From there on the difference steadily increases. News are particularly important to men aged 35–64 years.

It is in fact rather surprising that so many people mention the news as their favourite programme. This may be an indication of the high status that the news enjoy in the programming value hierarchy, but equally so of the fact that the news belong so characteristically to television. The latter is perhaps most clearly seen in the scarcity of references to specific broadcasts or programme names; the news are commonly experienced as serialized, as closely bound up with the everyday. Needless to say, the popularity of the news depends in large part on the world situation as well as the situation at home.

About 40 per cent of the interviewees said their favourite television programmes were feature films; the figure was somewhat higher among men than women. Feature films were mentioned as favourites rather evenly in all age groups, although more so among viewers under 44 years than in the older age groups.

Most references to entertainment as a favourite programme mention specific programme names. One third of the respondents mentioned some programme in this category as their favourite. Entertainment is mentioned by women as a favourite far more often than by men. The number of references to entertainment as a favourite programme increases steadily with age.

Almost one fifth of the respondents mentioned nature programmes as their favourite. References to nature programmes increase with age. The relative popularity of nature programmes compared with other corresponding programme types is indicative of their highly acceptable contents in Finnish culture. There is no resistance against this programme category.

Some ten per cent of the respondents mentioned music programmes as their favourites; the figure was higher for women than men. There were no major differences between different age groups, although among women the youngest age groups as well as those over 45 years were somewhat more interested.

Music videos were very rarely mentioned as favourite television programmes, even though the viewing of them is very common among young people (see Liikkanen 1994b). This may be a symptom of changing discourses: music videos are not necessarily regarded as television programmes, just as listening to music is not necessarily regarded as listening to the radio. This is probably connected with changing listening habits, with music and the electronic image being more and more closely integrated at the same time as the role of other media in music listening is declining (see Seppänen 1994).

Theatre shows and performances were mentioned as favourite programmes by two per cent of the interviewees, and other cultural programmes by about one per cent. In both cases the number of references was highest among women over 45. Judging by the data from the qualitative pilot surveys for the leisure survey, culture and arts programmes do not appear as an integral part of everyday television culture; they are hard to pick out from the flow of television programmes; and people typically watch these programmes more or less at random.

An overview of people's television programme choices suggests that there are no major differences between social groups. It seems that those choices are determined through and on the basis of everyday life, which means that the distinctions made reflect the power relations at home and people's life situation; and at a societal level, the relationships between the genders and generations. People talk about television programming from the point of view of family and the everyday, not so much as representatives of their social group.

So key distinctions concerning television programmes are based on the dimensions of gender and, on the other hand, age and generation. Choices based on gender are such that men prefer news, feature films and sports; and reject soap operas and high culture; the respective categories for women are serials (and most particularly family serials), entertainment, current affairs programmes and high culture; and sports, violence, war and soaps.

Points of culmination for the rejection of the taste of the opposite sex are sports and soap operas. Indeed some scholars have drawn direct parallels between these programme categories (O'Connor & Boyle 1991), saying that sports programmes are men's soap operas. The argument is that in the same way as soap-opera family serials move within the traditional domain of women's competence (human relations and privacy), sports programmes exhibit the cultural experience of male viewers: practices and fantasies of power, control and autonomy.

Distinctions related to age and generation are seen in the focusing of choices and rejections on the origin of programming (domestic/foreign) so that older generations prefer domestic programmes and reject foreign programmes, while younger viewers prefer foreign programmes and reject domestic programmes. It also seems that younger generations are more analytical in their discourses on television. For example, their distinctions concerning the genres of foreign serials are rather accurate. The orientation of younger generations towards international material is also seen in their viewing of satellite programmes and music videos. The same age and gender-based choices are also seen in the viewing of video programmes.

The 1980s also saw many important changes in radio (see Media statistics, section 3, in this volume; Liikkanen 1994a). Since the late 1980s the traditional mode of radio production has had to give more and more way to the new, alternative concept of broadcast flow, from which it is much harder to identify an individual programme in the traditional sense: a separate entity that is broadcast under its own title in a given programme slot at a certain time. At the same time music has emerged to occupy an increasingly central place in radio programming. One interesting development during the 1980s was the increasing popularity of phone-in programmes; radio wanted to emphasize the interaction between listeners and producers and the role of listeners in actually making the programmes.

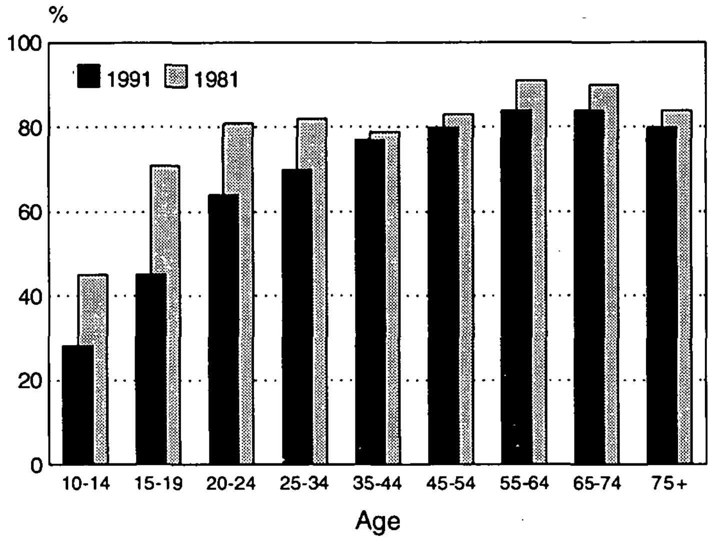
One aspect of the 1991 leisure study was to measure the frequency of radio listening. Radio is clearly the same sort of everyday medium as television. In the population aged ten years and over, about 70 per cent listen to the radio every day; those who never listen represent only two or three per cent. However, the proportion of those who listen to the radio every day has declined over the past ten years: in 1981 around 80 per cent listened to the radio on a daily basis.

The proportion of daily listeners has decreased in all age groups and social classes, but the decline is particularly clear in the age group under 35 where there are fewer and fewer people who say they listen to the radio every day. The sharpest decline (26 percentage points) is recorded for the age group 15–19 years; similarly, the figure is almost 20 per cent for those under 25. (Figure 4.) YLE diary studies also indicate that people who spend a lot of time listening to the radio are typically in the oldest age groups (see Ruohomaa 1992). By social group, the number of daily listeners is lowest among upper white-collar employees, students and the unemployed.

Radio listening habits are clearly in a state of flux: more and more often now, people listen to the radio in the background rather than with concentration. About one in five say they always or usually listen to the radio with concentration, while the remaining 80 per cent listen to the radio usually or always in the background. Only 5 per cent always listen to the radio with concentration.

The younger the person, the more likely it is that he or she listens to the radio in the background or not at all. If radio listening consists primarily in background listening, then it is probably harder to notice and people will talk about it in different terms than formerly. This applies particularly to young people for whom listening to the radio in the background might no longer be defined as "listening to the radio" but as something else, such as listening to music.

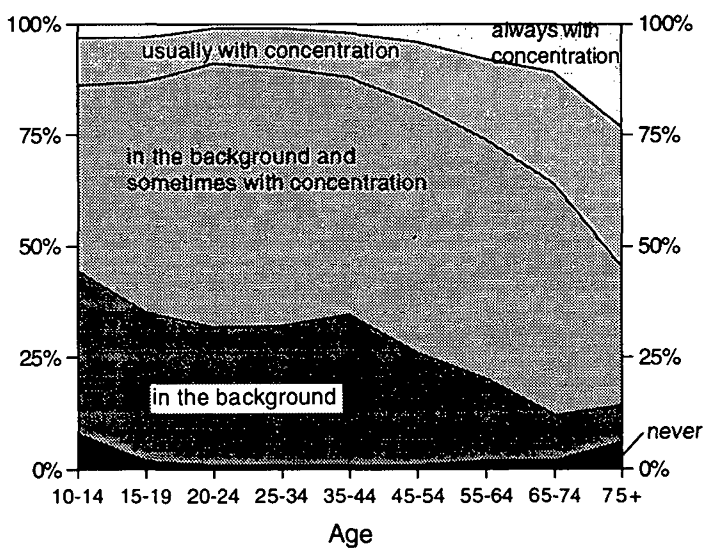
Figure 4.
Daily listening in 1981 and 1991



Source: Statistcs Finland leisure surveys 1981 and 1991

Concentrated listening is most common in the age group 65 or over, where over 40 per cent say they usually or always listen to the radio with concentration. (Figure 5.) By social group, concentrated listening is commonest among upper white-collar employees, pensioners and farmers.

Figure 5.
Ways of listening in 1991



Source: Statistics Finland leisure survey 1991

Even though both local radio stations and YLE have managed to attract at least some young people, it seems that radio is today (and perhaps to increasing extent so) a medium of older age groups. The picture is reinforced when we look at people's attitude towards radio listening. Older generations regard radio listening as far more important than younger people (Liikkanen 1994a). In other words, the meaning of radio and listening habits are quite different in young people and in older age groups.

All in all, radio listening is still regarded on average as equally important as television viewing. Two thirds of the respondents feel it is at least equally important, less than one sixth say it is very important and only three per cent regard it as completely unimportant. Although the proportion of daily listeners is somewhat higher among men than women, women still consider radio listening as more important than men in all age groups.

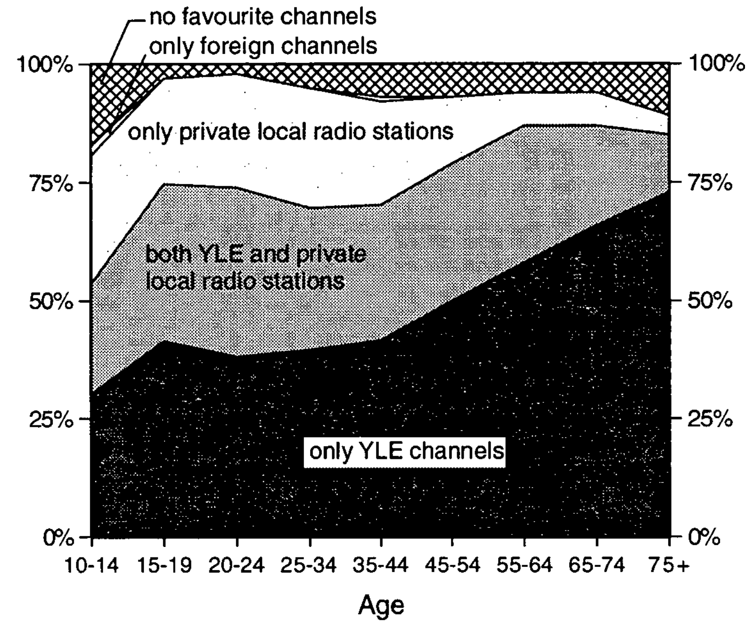
Radio profiles

The biggest changes on the Finnish radio scene in the 1980s were triggered by the arrival of private local radio stations, which soon won fairly substantial audiences. The impression we got from the qualitative pilot studies for the leisure survey was that (at least at the time of those studies) people chose their favourite television programmes mainly on the basis of content as well as broadcasting time. Therefore we had no questions in the survey concerning people's favourite television channels. In the case of radio, it is not so much individual programmes but rather radio stations or channels that they listen to. Only six per cent of the respondents said they had no favourite channel; the figures were highest in the age group under 15 years, who also listen to the radio least often. (Figure 6.)

According to the results of the 1991 leisure survey, private local radio stations have established a relatively firm position among the radio-listening audience. Almost half of the respondents mentioned at least one local radio station as their favourite. However, YLE channels were still mentioned far more often: three in four respondents mentioned an YLE channel among their favourites. Just under half of the respondents only mentioned YLE channels, less than one fifth mentioned only private local radio stations, and 28 per cent mentioned both. The proportion of those who only mentioned YLE channels was highest in the age group 55 or over, and accordingly the proportion of those who only mentioned private local radio stations was highest in the younger age groups.

In 1990 YLE carried out what it has described as a radio reform or a radio renaissance. In this reform all its channels were reprofiled as follows: YLE 1 was established as a channel for classical music and cultural programmes;

Figure 6.
Favourite radio channels in 1991



Source: Statistics Finland leisure survey 1991

YLE 2 or Radiomafia was established as a young people's pop and rock channel; and YLE 3 or Radio Finland was established as a news and current affairs channel. The nationwide Swedish channel (YLE 4) remained a full-service channel. (Ruohomaa 1991.) YLE's local news are broadcast on YLE 3, which has taken on the challenge of local radio stations on the domestic front; while YLE 2/Radiomafia is a more cosmopolitan channel with a modern profile.

YLE 2 or Radiomafia has clearly succeeded in profiling itself as a young people's channel: in the age group 45 or over only 5 per cent mentioned it as their favourite. In younger age groups an average of around 40 per cent mentioned Radiomafia as one of their favourites. The number of references was highest in the age group 15–24, where 65 per cent said it was their favourite. People in this age group also referred most frequently to local radio stations (almost 60 per cent).

The channel with the oldest audience is YLE 1: in the age group 65 or over 40 per cent said it was their favourite, in the age group 75 or over almost half, while among those under 25 only a few per cent mentioned YLE 1 as their favourite. However, the most popular YLE channel of all is Radio Finland, which is mentioned more and more often in older age groups.

However, it is not a great favourite among younger listeners: in the age group under 25 it was mentioned by less than 10 per cent, whereas among those aged 55–74 years almost 60 per cent mentioned it as their favourite. Among listeners 75 or over, YLE 1 is more popular than Radio Finland.

Choices of radio programmes

The leisure survey measured choices of radio programmes by asking the respondents to say in their own words what kind of programmes they listened to on the radio. The programmes mentioned should therefore represent the programmes that these people mainly listen to, the programmes they have chosen themselves, and the programmes that probably are most important to them.

As is clear from this list, most references to radio programmes were of a rather general nature; this applies particularly to the top end of the list.

Top ten radio programmes mentioned

1. music
2. news
3. factual/information
4. current affairs
5. anything/what happens to be on
6. plays
7. religious programmes
8. Church services
9. interviews
10. request programmes

Music is by far the most common type of programme that people listen to on the radio. Over half of the respondents said they listened to music. Music was mentioned by large numbers in all age groups, but the figures clearly increased towards younger age groups.

References were made not only to music in general but also to a wide range of different types of music and music programmes. Among young people the accent was distinctly on rock and pop music and music charts; from about age 30 onwards, references were also made to classical music, light music as well as schlagers. Dance music and spiritual music attract older listeners.

About one third of the respondents said they listened to the news. The news were mentioned in all age groups, but the figures clearly increase with age. Men say they listen to the news on the radio somewhat more often than women. In other words, the general picture is very much the same as in the case of television.

Music and the news are mentioned far more often than any other programme category; the number of respondents referring to the next category on the list, i.e. factual/information programmes, was just under 10 per cent; the figure is roughly the same for current affairs programmes and unselective listening. In the remaining categories the share of individual references dropped to five per cent and below.

References to factual/information and current affairs programme were made rather evenly in all age groups with the exception of listeners under 15. However, the listening of factual/information programmes increased towards the older age groups. Women mentioned factual/information programmes more often than men. There were no differences between men and women in the frequency of references to current affairs programmes.

The proportion of respondents who said they listened to everything or anything that was on, was evenly divided between all age groups, but the figure was slightly higher among those aged 25–35 years. However, there were no gender differences in unselective listening. Radio sports programmes are favoured particularly by men in all age groups.

That religious programmes and Church services rank so high on the list of most-favoured radio programmes is a clear indication of the importance of radio to older generations. In the age group under 30, these programme categories were not mentioned at all. The number of references increases steadily with increasing age; the figure is highest among women aged 65 or over.

Otherwise people's preferences in radio programming are very much the same as in television. Large numbers say they like to listen to nature programmes, entertainment and comedy as well as quiz shows. Likewise, older age groups in particular say that they prefer domestic to foreign programmes.

On the other hand there are also certain features that are clearly distinctive to radio; some of these are traditional, some new. These include the emphasis on local concerns in radio programming, phone-in programmes, programme-flow broadcasts and listening being closely linked up with the situation and place.

It seems that the latter factor is becoming more and more important in radio-listening. People describe their choices of radio programmes as often being connected with everyday rituals and routines, such as driving to work or going to school, going to sleep, etc. People listen to the radio in the car, at work, at their summer cottage, when they are cleaning or cooking, in the evening or morning, or just during weekends. Many people link up specific programmes and listening habits with different situations or places.

In sum, it may be said that radio listening habits and programme choices are rather clearly distinguished in different generations. The importance of radio is clearly emphasized in older generations; old people listen to the radio a lot, and their listening is quite concentrated. As far as contents are concerned the accent is on news, on domestic programming, local news, traditional everyday matters such as nature, forest, agriculture, gardening and cooking, traditional music and spirituality.

In the youngest age groups radio tends to be less important and listening less common. For young people the radio typically represents background noise; they listen to rock and pop music, they are more international, they are interested in the new forms of expression in radio, in programme flows, and they tune in to Radiomafia and local radio stations.

Looking at different social groups, only upper white-collar employees differ to some extent from this generational model: they tend to listen to the radio to a lesser extent and also in a more concentrated fashion.

Although the radio, like television, is essentially a form of domestic technology, the changes that are taking place in radio listening habits are now causing it to drift further apart from the domain of the home. As in the case of television, the principal distinguishing factors in the choices of radio programmes are generation and gender. However, in radio it would seem that generational differentiation (along some sort of modernism-traditionalism dimension) is even clearer than in television. By contrast, gendered distinctions, reflecting among other things power relations within the family, would not seem to have the same sort of effect as in the case of television. Indeed it seems that radio is becoming an increasingly individualized medium which people listen to more and more often outside the home. Further, since there is often more than one radio in the same household, radio choices are unlikely to cause any profound internal conflicts or choice situations within the family.

New equipment and new modes of expression in the home during the 1980s

The 1980s saw an invasion in Finnish homes of new electronic (visual) media and more and more sophisticated equipment. With the breakthrough of the electronic image, television viewing became a more everyday activity, viewing habits changed, and video became an integral part of television viewing. At the same time, television viewing increased in all age groups, and viewing habits showed a clear tendency towards convergence between different social groups.

There were also significant changes in the field of radio. First of all, radio listening has become less frequent than before. The arrival of local radio stations also meant the arrival of a whole new mode of radio expression. At the same time, music gained added importance as a programme content, and the radio moved more and more into the background. The meaning of radio and radio listening habits are different in different generations. It remains very important indeed to older people, who continue to listen to the radio with concentration. Radio listening has decreased more among younger people than in other age groups; young people are more inclined to listen to the radio in the background; and young people do not consider radio listening as equally important as older age groups. Choices of radio channels are also differentiated by age.

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MEDIA STATISTICS

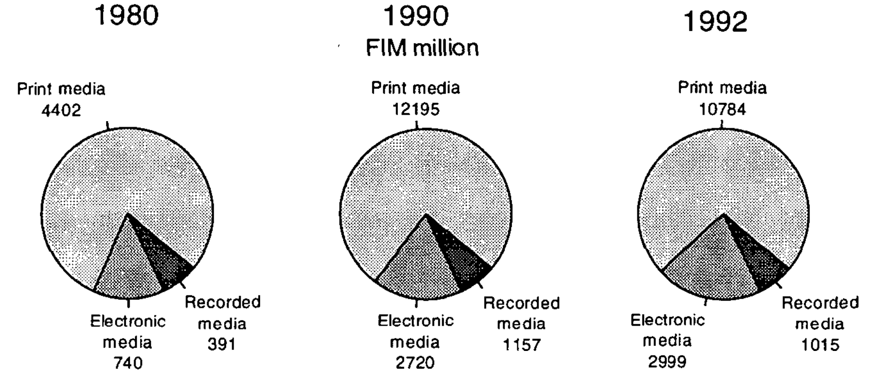
1 Mass media economy and consumption

Statistics on the turnover of Finnish mass media during the1980s attest to a fairly impressive rate of growth: at current prices the increase in turnover was almost threefold, at constant prices 1.5-fold. In recent years the sector as a whole has represented around three percent of the country's GNP. (Table 1.1)

The electronic media have been growing faster than the competition: since the beginning of the 1980s, the print media have lost seven percentage points of their market share to the electronic media. Nonetheless the print media (newspapers and magazines, books, printed advertisements) are still way ahead as they represent three quarters of the sector's turnover.

Since the national economy nosedived into a deep recession in the early 1990s, the turnover of the mass media in Finland has been declining. In 1992, turnover stood at FIM 14.8 billion, which was less than three years previously in 1989. The figure peaked in 1990 at around FIM 16.1 billion.

Figure 1.1
Mass media turnover in 1980, 1990 and 1992



Source: Table 1.1

The print media have been more badly affected by the economic recession that hit the country in the early 1990s than the electronic media. The latter continued to increase their relative share of the mass media business. The change was by no means dramatic, but it marked an important symbolic turning-point (in 1991): for the first time in history the turnover of (electronic and recorded) audiovisual media increased to represent over one quarter of the figure for the whole sector. (Table 1.1.)

The development of the print media

Finland is traditionally a land of newspapers. The circulation of Finnish newspapers ranks among the highest in the world. Calculated per 1,000 population, the circulation of Finnish dailies, for example, is fourth only to Norway, Japan and Sweden.

Measured in terms of annual turnover, dailies are by far the most significant mass media in Finland. Currently daily newspapers account for about one fourth of the total turnover of the media sector and for over half of all advertising through the mass media. During the 1980s their lead over the other media continued to grow wider. However, the recession has now been reversing this trend. With the ongoing recession the market share of the daily press has dropped back to the level of the early 1980s. As newspapers are heavily dependent on revenues from advertising, they are bound to be affected when companies decide to cut their advertising budgets. (Tables 1.1 and 1.4.)

In the early 1990s, the total circulation of Finnish newspapers started to decline - for the first time since World War II. Some newspapers have even been closed down altogether, and circulations have been decreasing across the board. For many newspapers, the changes have been considerable.

In spite of several takeovers and mergers in the print press during the 1980s and early 1990s, the ownership of Finnish newspapers is by no means heavily concentrated. For instance, the combined circulation of the four biggest newspaper publishers in Finland is smaller than in the other Scandinavian countries.

In terms of economic volume, magazines and periodicals represent the second biggest category in the Finnish mass media sector. Since the early 1980s the share of this category tended to decline somewhat, but in the early 1990s the figures have remained more or less unchanged.

Magazines and periodicals are dependent on advertising to a far lesser extent than newspapers; by now subscriptions and single copy sales probably account for an average four fifths of their total revenues. The total circulation of magazines and periodicals continued to grow in the early 1990s, relieving somewhat the adverse effects of the much reduced budgets of advertisers.

Finland's biggest publishers all remain in domestic ownership. The three major publishers of magazines and periodicals account for some 80 percent of the volume of consumer magazines and for over one quarter of the total output in this category (the total number of consumer magazines, business magazines, customer magazines and opinion journals published in Finland adds up to some 2,500 titles). At the same time, however, a number of major Scandinavian publishers (Aller, Bonnier, ICA) have established a firm position in the marketplace.

As far as book publishing is concerned, the market is very much dominated by major and medium-sized general-interest publishers. In recent years, however, smaller publishers specializing in certain types of literature have clearly been increasing their market shares.

Book publishing has been the third biggest segment of the mass media business in Finland throughout the 1980s. Given the difficult conditions that have prevailed in recent years, it has been doing reasonably well, even though sales have been adversely affected by forced decisions in schools and libraries to cut back on their purchases.

The rapid growth of free sheets that started towards the end of the 1970s, continued up until the late 1980s. According to turnover statistics this development was reversed before the onset of the recession. The turnover of printed advertising material has dropped sharply since the recession.

Electronic media

In 1991 nationwide television and radio broadcasting narrowed down the long-standing lead of book publishing and by 1992 went clearly ahead of it. The turnover of nationwide broadcasting continued to increase, reaching FIM 2.3 billion in 1992. (Table 1.1)

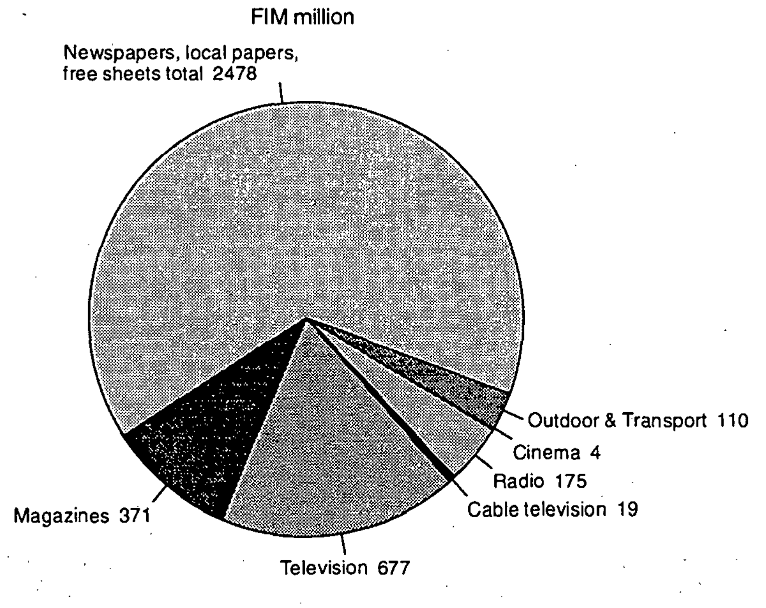
Since the beginning of regular television broadcasting in Finland in 1957, the commercial MTV had to lease broadcasting time from the public service broadcaster YLE on channels TV1 and TV2. There have also been various other links of dependency between the two companies: for instance, MTV has broadcast its programmes under YLE's operating licence (until autumn 1993); MTV has occupied an important role as a source of financing in addition to licence fees; YLE has been an important minority shareholder of MTV.

At the beginning of 1993 the two broadcasters, public service YLE and commercial MTV, were allocated their own channels: YLE1 and YLE2 are now reserved for public service broadcasting while MTV3 Finland operates its own nationwide, full-service network under its own operating licence, but still acting as an important source of financing the public service broadcaster YLE.

In the late 1980s cable television networks were expanding at a rate of approximately 100 000 new subscribers per annum. During the past couple of years things have been moving much more slowly, but even so cable television showed an increase in total turnover in 1992. This was accounted for by subscription fees and revenue from pay-tv. There was no essential change in advertising revenues.

If measured in terms of turnover, cable television and local radio stations lag far behind the national television and radio systems. Nonetheless cable television has by now secured a fairly stable (albeit marginal) presence in the advertising markets through PTV, which started up under the ownership of the three biggest newspaper publishers in the country in 1990. PTV produces a package of prime-time programming for some twenty of the biggest cable networks, and it also coordinates the sale of advertising time. (Tables 1.1 and 1.4.)

Figure 1.2
Advertising in mass media 1992



Source: Table 1.4

Commercially financed local radio stations spread out across the country within the space of just a few years after the first licences were issued in the mid-1980s, and they quickly secured their (small) share of the advertising cake. However, the recession has severely affected local radio stations during the past couple of years. At the end of 1993, there were 56 stations in operation, 50 of these being commercial and 6 non-commercial.

Electronic data services showed rapid growth during the 1980s, and the trend has continued in the early 1990s. A number of new services have been launched in a situation where the market is continuing to expand.

Recorded media

Phonograms are the biggest single category of recorded media in terms of economic volume. With the exception of a minor downtrend around the mid-1980s, sales of phonograms showed a consistent pattern of growth throughout the last decade. Prior to the onset of the recession, a major factor behind this development was the growing market share of CDs, which by now have clearly taken over from the C-cassette as market leader. The growth of CDs slowed down in 1991, and in 1992 turnover dropped by around ten per cent. (Table 1.1.)

The video markets are divided into two segments, i.e. video rentals and sell-through. During the 1980s the main emphasis was definitely on the former; sell-through videos accounted for only a marginal share of the markets. The growth of the rental markets was quite phenomenal, but so too was the decline that followed. In 1991, the markets collapsed completely. The turnover of the video rentals dropped by one quarter.

It seems that these developments are due to a clear change in consumer behaviour. This theory is supported by the fact that sell-through has continued to increase even since the onset of the recession. In 1992, sell-through videos accounted for 40 % of the video markets.

Cinema admissions have been declining since the early 1980s. The distribution network has been trimmed, and the number of movies shown has decreased substantially. Finnish cinemas are heavily dependent on the box office of the most popular movies. In money terms the cinema business has been gradually slipping towards the low end of the mass media sector. Together with local radio, cinemas represent the smallest sector of the Finnish mass media business measured in terms of turnover.

Advertising

Advertising has been declining during the early 1990s. In 1990, a total of FIM 5.7 billion was spent on advertising in the mass media, whereas the figure for 1992 was down to FIM 4.4 billion. At the same time the share of mass media advertising of GNP has declined. (Table 1.3.)

Newspapers are the most important advertising medium, accounting for 60 per cent of the total advertising budget. By contrast, the magazine business in Finland (and in the other Nordic countries) has a relatively modest market share in a European comparison: in 1992 it was ten per cent. (Table 1.4.)

Television's share of the advertising cake grew smaller towards the end of the 1980s. Its relative share did not climb back to the level it had reached in the mid-1980s until 1991, when the recession began to affect advertising in the print media. The newly formed third national television channel has done rather well on the regional advertising markets. Advertising through cable television (mainly PTV) remains at a modest level. The share of commercial local radio stations in the sale of media space is at a fairly stable 4-5 per cent.

The employment effects of mass communication

The mass media sector employed 2.2 per cent of the work force in 1992, showing no real change since the early 1980s. These figures do not include personnel in the wholesale and retail trade of communication media, freelance journalists or artists working in the media. (Table 1.5.)

As well as representing the biggest sector in money terms, the print media in Finland are also by far the biggest employer in the mass media.

Posts and telecommunications employ somewhat smaller numbers than the mass media sector.

Household mass media consumption and expenses

In 1990 Finnish households spent 3.8 per cent of their total consumption expenditures in mass media, down by one percentage point on the figure for 1985 (4.8 %). The biggest single expense item was represented by newspapers and magazines, accounting for 40 per cent of total expenditure as against one quarter or 26 per cent for electronic media and one fifth or 22 per cent for recorded media. Only one tenth of total consumption expenditure in mass media was on books. (Table 1.20.)

Retail sales of entertainment electronics in Finland totalled FIM 1.7 billion in 1992, down by almost one quarter on the figure for the previous year. (Table 1.19.)

About two thirds of Finnish households had a television remote control and a VCR in 1993. Over one third of the households had teletext and over one fifth a personal computer. (Figures 1.4 and 1.5; Table 1.21.)

Statistical sources

Data on the turnover of the mass media in Finland are based on a wide range of statistical sources compiled at different levels. The data for many sectors are crude estimates. The turnover data have been jointly compiled by the Unit of Culture and the Media at Statistics Finland and VTT Information Technology.

Advertising investments and their breakdown by different mass media are monitored by Suomen Gallup-Media. In the time-series presented in Table 1.3, advertising planning and production costs are included in the figures for media advertising. The net figures describing the time-series years 1980-87 have been adapted to comply with the new calculation method used since 1988. Table 1.4 provides more detailed data on the breakdown of advertising in the early 1990s: so-called media investments (purchases of media space) are distinguished from advertising design and production. The figures only cover advertising in the mass media; direct mail advertising, index advertising, advertising at fairs and exhibitions, sponsorship, and business gifts are not included.

The figures for industrial production, imports and exports as well as retail trade in mass communication are mainly drawn from the industrial statistics and business register of Statistics Finland, the foreign trade statistics maintained by the National Board of Customs, the statistics of the Federation of the Printing Industry in Finland, and the retail statistics of the Domestic Appliances Association.

The key sources for consumption expenditure in mass media and for the ownership of mass media in Finland are FinStat's household survey (which has been carried out since 1966 at approximately five-year intervals) and biannual consumer barometer. The data on teletext and remote controls are from annual surveys commissioned by YLE.

Finally, data on the amount of time spent with different mass media are from the Intermedia study by Gallup-Media. Data on the amount of time spent with mass media relative to other time-usage are to be found in the time use studies by Statistics Finland.

1.1 Mass media turnover in 1980 and 1985 – 1992

	1980		1985		1986		1987		1988	
	FIM million	%	FIM million	%	FIM million	%	FIM million	%	FIM million	%
Dailies (7–4 times a week)	1 467	26.5	2 920	27.6	3 155	27.9	3 405	27.5	3 820	28.5
Non-dailies (3–1 times a week)	225	4.1	460	4.4	510	4.5	575	4.6	645	4.8
Free sheets	85	1.5	230	2.2	270	2.4	290	2.3	305	2.3
Magazines & periodicals	1 205	21.8	2 125	20.1	2 180	19.3	2 280	18.4	2 460	18.4
Books	870	15.7	1 340	12.7	1 530	13.5	1 710	13.8	1 790	13.4
Printed advertising material	550	9.9	1 230	11.6	1 270	11.2	1 450	11.7	1 380	10.3
Print media total	4 402	79.6	8 305	78.6	8 915	78.9	9 710	78.5	10 400	77.6
Nationwide television & radio	732	13.2	1 390	13.2	1 480	13.1	1 570	12.7	1 700	12.7
Local radio	–	0.0	10	0.1	39	0.3	73	0.6	116	0.9
Cable television	7	0.1	44	0.4	55	0.5	161	1.3	224	1.7
Electronic data services	1	0.0	50	0.5	70	0.6	90	0.7	120	0.9
Electronic media total	740	13.4	1494	14.1	1644	14.6	1894	15.3	2160	16.12
Phonograms	252	4.6	404	3.8	368	3.3	417	3.4	462	3.4
Videos	3	0.1	190	1.8	205	1.8	210	1.7	225	1.7
Cinemas	136	2.5	173	1.6	160	1.4	139	1.1	155	1.2
Recorded media total	391	7.1	767	7.3	733	6.5	766	6.2	842	6.3
Mass media total	5 533	100.0	10 566	100.0	11 292	100	12 370	100.0	13 402	100.0
Mass media as % of GNP	2.87		3.18		3.18		3.20		3.08	

(continued)

1.1 continued

	1989 FIM million	%	1990 FIM million	%	1991 FIM million	%	1992 FIM million	%	Change 1991/92
Dailies (7–4 times a week)	4 350	29.1	4 450	27.7	4 115	26.7	3 870	26.2	–6.0
Non-dailies (3–1 times a week)	640	4.3	680	4.2	690	4.5	650	4.4	–5.8
Free sheets	315	2.1	325	2.0	285	1.9	244	1.6	–14.4
Magazines & periodicals	2 740	18.3	2 900	18.0	2 800	18.2	2 745	18.5	–2.0
Books	1 960	13.1	2 210	13.8	2 130	13.8	2 025	13.7	–4.9
Printed advertising material	1 550	10.4	1 630	10.1	1 450	9.4	1 250	8.4	–13.8
Print media total	11 555	77.3	12 195	75.9	11 470	74.5	10 784	72.9	–6.0
Nationwide television & radio	1 850	12.4	2 022	12.6	2 160	14.0	2 283	15.4	5.7
Local radio	195	1.3	215	1.3	180	1.2	175	1.2	–2.8
Cable television	190	1.3	313	1.9	300	1.9	321	2.2	7.0
Electronic data services	160	1.1	170	1.1	205	1.3	220	1.5	7.3
Electronic media total	2395	16.0	2720	16.9	2 845	18.4	2 999	20.3	5.4
Phonograms	558	3.7	666	4.1	651	4.2	582	3.9	–10.6
Videos	255	1.7	305	1.9	265	1.7	255	1.7	–3.8
Cinemas	191	1.3	186	1.2	188	1.2	178	1.2	–5.3
Recorded media total	1 004	6.7	1 157	7.2	1 104	7.2	1 015	6.9	–8.1
Mass media total	14 954	100.0	16 072	100.0	15 419	100.0	14 798	100.0	–4.0
Mass media as % of GNP	3.07		3.12		3.15		3.11		

NB: This table includes several estimates.

Source: Statistics Finland Unit of Culture and the Media; VTT Information Technology.

1.2 Turnover of the biggest companies in mass communication in 1980 and 1985 – 1992*

	1980	1985	1986	1987	1988	1989	1990	1991	1992
	FIM million								
Sanoma Group	611	1 351	1 480	1 627	1 801	2 106	2 203	2 001	1 934
Finnish Broadcasting Company YLE	674	1 116	1 241	1 352	1 371	1 460	1 593	1 684	1 810
Aamulehti Group	126	340	650	660	856	1 481	1 468	1 402	1 306
TS Group	218	461	494	539	604	718	788	759	710
MTV	237	501	507	517	498	536	675	663	706
WSOY	229	496	514	532	553	625	674	651	643
A-lehdet	131	228	226	223	232	496	550	531	547
Yhtyneet Kuvalehdet	149	284	294	302	324	347	505	477	465
Otava	159	332	366	379	392	407	350	341	347
Fazer Musiikki	..	262	423**	312	315	348	358	309	280

* Based on the situation in 1992. Another company that could be counted among the country's biggest media companies is Rautakirja: approximately one third of the group's total turnover of FIM 2 923 million (1992) comes from single-copy sales of newspapers and magazines, video rentals and the distribution of films. The booksellers Suomalainen Kirjakauppa also belong to Rautakirja.

** 18 months.

Sources: Company annual reports.

1.3 Advertising in 1980 – 1992*

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
	%												
Newspapers**	64.8	65.5	65.2	66.3	67.3	68.5	69.0	68.4	69.5	69.2	67.4	66.3	63.8
Magazines & periodicals	16.8	16.0	15.9	15.6	14.4	13.4	12.7	12.0	11.5	11.1	11.3	10.6	10.0
Television***	15.6	15.8	16.5	15.6	15.9	15.4	14.9	15.4	13.8	13.5	14.2	16.1	18.7
Radio	–	–	–	–	–	0.2	1.1	1.7	2.5	3.5	4.2	4.0	4.4
Cinema	0.2	0.3	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Outdoor & transport advertising	2.6	2.4	2.3	2.3	2.2	2.4	2.3	2.4	2,6	2.6	2.8	2.9	3.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Advertising in mass media total FIM million****	1 635	1 980	2 299	2 766	3 255	3 615	3 916	4 323	4 869	5 636	5 667	4 944	4 414
Advertising as % of GNP	0.95	0.91	0.94	1.01	1.06	1.09	1.11	1.12	1.12	1.16	1.10	1.01	0.93

* These data are net of discounts. Figures include planning and production costs. Net figures for 1980-87 have been adapted to comply with the new calculation method used since 1988.

** Dailies, non-dailies, and free sheets.

*** Cable television included since 1984.

**** These figures do not include direct advertising (approx. FIM 1 600 million in 1992), index advertising (approx. FIM 260 million in 1992), exhibition advertising (approx. FIM 800 million in 1992), business gifts (approx. FIM 650 million in 1992) and sponsorship (approx. FIM 200 million in 1992). Figures differ somewhat from the sums given in Table 1.4 because they have been rounded off.

Source: Suomen Gallup-Media Oy.

1.4 Advertising in 1988 – 1992*

	1988		1989		1990		1991		1992		Change
	FIM million	%	FIM million	%	FIM million	%	FIM million	%	FIM million	%	91/92 %
Dailies (7–4 times a week)	..	..	..	..	2 660	55.4	2 250	53.8	2 002	52.3	–11.0
Non-dailies (3–1 times a week)	..	..	..	..	380	7.9	358	8.6	302	7.9	–15.6
Newspapers total	2 677	65.4	3115	65.4	3 040	63.4	2 608	62.4	2 304	60.1	–11.7
Free sheets	218	5.3	225	4.7	230	4.8	203	4.9	174	4.5	–14.3
Newspapers and free sheets total	2 895	70.7	3340	70.2	3 270	68.2	2 811	67.2	2 478	64.7	–11.8
Consumer magazines	229	5.6	253	5.5	270	5.6	225	5.4	188	4.9	–16.4
Trade & business magazines	180	4.4	207	4.3	205	4.3	171	4.1	144	3.8	–15.8
Customer magazines	41	1.0	43	0.9	56	1.2	35	0.8	39	1.0	11.4
Magazines & periodicals total	450	11.0	503	10.6	531	11.1	431	10.3	371	9.7	–13.9
Press media advertising total**	3 345	81.7	3843	80.7	3801	79.2	3 242	77.5	2 849	74.4	–12.1
Television	531	13.0	608	12.8	638	13.3	628	15.0	677	17.7	7.8
Cable television	7	0.2	8	0.2	17	0.4	18	0.4	19	0.5	8.6
Radio	109	2.7	180	3.8	215	4.5	180	4.3	175	4.6	–2.8
Electronic media advertising total	646	15.8	796	16.7	870	18.1	826	19.8	871	22.7	5.5
Cinema	3	0.1	3.4	0.1	3.7	0.1	3.2	0.1	4	0.1	34.4
Outdoor/Transport	100	2.4	118	2.5	123	2.6	110	2.6	110	2.9	0.0
Mass media advertising total	4 095	100.0	4 760	100.0	4 798	100.0	4 181	100.0	3 834	100.0	–8.3
Planning and production	864	17.4	872	15.5	873	15.4	771	15.6	580	13.1	–24.8
Total***	4 869	100.0	5 632	100.0	5 671	100.0	4 952	100.0	4 414	100.0	–10.9

* Net of discounts value. A distinction is made between purchases of media space (media investments) and money spent in the planning and production of advertising (planning and production investments).
** Announcements, notices, column advertisements and public offices are not included in press advertising.
*** Cf. note 4 to Table 1.3.

Source: *Suomen Gallup-Media Oy.*

1.5 Mass communication as employer 1980 – 1991*

	1980	1985	1986	1988	1990	1991
	1 000 persons					
Publishing	14.6	16.9	17.9	16.4	16.0	15.6
Printing	23.1	24.2	20.5	22.7	23.4	21.0
Radio and television	4.7	5.3	5.8	6.6	6.9	6.0
Films, videos & phonograms	1.5	1.8	1.9	1.5	1.9	1.5
Manufacture of entertainment electronics	2.9	2.5	2.4	2.8	2.0	1.5
Advertising, news agencies	2.8	3.2	5.7	5.3	4.9	4.6
Mass communication total	49.6	53.9	54.2	55.3	55.3	50.2
National economy	2 328	2 437	2 431	2 431	2 467	2 340
Contribution of mass communication to national economy, %	2.1	2.2	2.3	2.3	2.3	2.2
Telecommunications total	41.3	43.3	47.0	46.7	48.8	44.0

* Figures do not include personnel in wholesale and retail trade.

Source: Business register, Statistics Finland.

1.6 Share of domestic production in different sectors of mass communication

Sector	Share of domestic production (%)	Basis for calculation
Literature	65	Finnish literature as proportion of all titles published in 1991
Phonograms	32	Phonograms produced in Finland as proportion of combined imports and production 1992*
Film	11	Finnish film audience as proportion of total cinema-going audience 1992
Video	3	Finnish video programmes as proportion of wholesale (rentals + sell-through) of Finnish Group of IFPI
Television		
– YLE	54	As proportion of programming time 1991/92
– MTV	37	As proportion of programming time 1991/92
– Channel Three	54	As proportion of programming time 1991/92

* The figure is depressed most particularly by the fact that the technical production of CDs by Finnish artists takes place abroad.

Sources: See Tables 2.13, 4.1, 6.1 and 7.1 in this volume.

1.7 Staff engaged in printing and publishing 1985 – 1991*

	Publishing and printing of newspapers and periodicals	Publishing and printing of books	Separate printing	Printing-related services	Total
1985					
Salaried employees	8 652	1 665	3 617	298	14 232
Wage-earners	7 772	767	14 355	1 602	24 496
Total	16 424	2 432	17 972	1 900	38 728
1986					
Salaried employees	8 650	1 471	3 707	340	14 168
Wage-earners	7 749	227	14 306	1 780	24 062
Total	16 399	1 698	18 013	2 120	38 230
1987					
Salaried employees	8 779	1 503	3 678	371	14 331
Wage-earners	8 169	150	14 091	1 842	24 252
Total	16 948	1 653	17 769	2 213	38 583
1988					
Salaried employees	8 984	1 536	3 569	388	14 477
Wage-earners	8 653	193	13 564	1 782	24 192
Total	17 637	1 729	17 133	2 170	38 669
1989					
Salaried employees	9 199	1 421	3 526	356	14 502
Wage-earners	9 237	136	12 692	1 673	23 738
Total	18 436	1 557	16 218	2 029	38 240
1990					
Salaried employees	9 503	1 397	3 427	314	14 641
Wage-earners	8 782	172	12 206	1 552	22 712
Total	18 285	1 569	15 633	1 866	37 353
1991					
Salaried employees	9 474	1 502	3 094	279	14 349
Wage-earners	8 684	160	11 121	1 445	21 410
Total	18 158	1 662	14 215	1 724	35 759
Change 1990/91, %	–0.7	5.9	–9.1	–7.6	–4.3

* Staff in companies with more than five employees. Includes regular part-time workers.

Source: Yearbooks of industrial statistics, Statistics Finland.

1.8 Value of deliveries in different branches of the printing industry 1988 – 1991

	1988	1989	1990	1991	Change 1990/91
	FIM million				%
Publishing and printing total	8 724	9 762	10 262	10 045	–2.1
– publishing and printing of newspapers and periodicals	7 162	8 122	8 668	8 273	–4.6
– book publishing and printing	1 561	1 640	1 594	1 772	11.2
Separate printing	6 696	7 051	7 375	6 662	–9.7
Printing related services	719	701	570	510	–10.5
Publishing and printing total	16 139	17 515	18 207	17 217	–5.4

Source: Yearbooks of industrial statistics, Statistics Finland.

1.9 Value of deliveries of some product groups in the printing industry 1987 – 1991

	1987	1988	1989	1990	1991	Change 1990/91
	FIM million					%
Books, leaflets	2 080	2 204	2 292	2 211	2 180	–1.4
Newspapers, periodicals*	8 420	9 169	10 035	10 582	9 963	–5.8
Children's illustrated books	110	111	118	136	132	–2.9
Bonds and securities	96	99	87	90	82	–8.9
Calendars	78	159	219	200	199	–0.5
Postcards	57	92	104	94	91	–3.2
Printed matter for advertising purposes	1 240	1 208	1 361	1 424	1 263	–11.3

* Includes advertising revenue.

Source: Yearbooks of industrial statistics, Statistics Finland.

1.10 Printing industry exports and imports 1980 – 1992

	Exports FIM million	Imports FIM million
1980	363.4	253.0
1981	370.1	251.2
1982	427.3	283.3
1983	414.3	349.7
1984	466.5	398.6
1985	571.4	459.1
1986	672.5	506.1
1987	717.7	583.0
1988*	631.3	508.9
1989	693.3	618.5
1990	774.7	638.3
1991	766.9	633.2
1992	883.8	668.9
Change 1991/92	15.3 %	5.6 %

* A new customs tariff law entered into force in 1988. As a consequence of this change in legislation, the figures for that year are somewhat below the true values. In certain product groups comparison with the corresponding figures for previous years became more difficult. It is important to bear in mind that production has to some extent been relocated to printing shops run by Finnish companies in foreign countries (mainly Sweden and England).

Source: Foreign trade statistics; Federation of the Printing Industry in Finland.

1.11 Exports of print media by product groups 1988 – 1992

	1988	1989	1990	1991	1992
	%				
Printed matter for advertising purposes	35.0	34.0	37.0	38.0	40.1
Newspapers & periodicals	27.0	27.0	25.0	28.0	30.0
Books & leaflets	22.0	21.0	22.0	21.0	16.6
Forms & labels	11.0	10.0	9.0	8.0	8.2
Other	5.0	8.0	7.0	5.0	5.1
Total	100.0	100.0	100.0	100.0	100.0
Total FIM million	631.3	693.3	774.7	766.9	883.8

Source: Foreign trade statistics; Federation of the Printing Industry in Finland.

1.12 Breakdown of printing industry exports by country 1988 – 1992

	1988	1989	1990	1991	1992
	%				
Sweden	45.0	46.0	43.0	45.0	47.2
Russia	11.0	12.0	20.0	15.0	5.1
Denmark	10.0	8.0	9.0	9.0	11.4
Norway	16.0	12.0	9.0	10.0	10.4
Great Britain	8.0	8.0	8.0	8.0	7.6
Germany	3.0	3.0	3.0	4.0	2.6
Netherlands	..	..	..	..	2.5
Other countries	7.0	11.0	8.0	9.0	13.2
Total	100.0	100.0	100.0	100.0	100.0
Total FIM million	631.3	693.3	774.7	766.9	883.8

Source: Foreign trade statistics; Federation of the Printing Industry in Finland.

1.13 Imports of print media by product groups 1988 – 1992

	1988	1989	1990	1991	1992
	%				
Printed matter for advertising purposes	39.0	39.0	37.0	37.0	36.6
Newspapers & periodicals	15.0	14.0	14.0	16.0	16.0
Books & leaflets	31.0	32.0	33.0	34.0	35.4
Forms & labels	3.0	3.0	3.0	3.0	8.4
Other	12.0	12.0	13.0	10.0	3.6
Total	100.0	100.0	100.0	100.0	100.0
Total FIM million	508.9	618.5	638.3	633.2	668.9

Source: Foreign trade statistics; Federation of the Printing Industry in Finland.

1.14 Breakdown of printing industry imports by country 1988 – 1992

	1988	1989	1990	1991	1992
	%				
Sweden	27.0	25.0	22.0	22.0	22.9
Great Britain	16.0	16.0	16.0	16.0	14.9
Germany	17.0	17.0	14.0	15.0	14.8
Denmark	8.0	8.0	10.0	10.0	10.5
USA	7.0	9.0	10.0	9.0	9.6
Netherlands	4.0	4.0	4.0	..	4.0
Italy	..	..	..	5.0	4.8
Other countries	21.0	21.0	24.0	23.0	18.4
Total	100.0	100.0	100.0	100.0	100.0
Total FIM million	508.9	618.5	638.3	633.2	668.9

Source: Foreign trade statistics; Federation of the Printing Industry in Finland.

1.15 Staff engaged in the manufacture of entertainment electronics and other means of communication 1985 – 1991

	Staff				
	Salaried employees		Wage-earners		Total
	N	%	N	%	N
Manufacture of communication technology*					
1985	3 177	48.7	3 343	51.3	6 520
1986	3 229	49.4	3 304	50.6	6 533
1987	3 433	50.5	3 364	49.5	6 797
1988	4 117	52.7	3 697	47.3	7 814
1989	4 617	55.6	3 681	44.4	8 298
1990	4 718	55.3	3 808	44.7	8 526
1991	4 597	57.2	3 435	42.8	8 032
Change 1990 – 1991 %	–2,6		–9,8		–5,8
Manufacture of entertainment electronics and recordings**					
1985	666	29.5	1 595	70.5	2 261
1986	702	29.7	1 666	70.4	2 368
1987	764	27.1	2 057	72.9	2 821
1988	844	27.2	2 265	72.9	3 109
1989	805	28.9	1 983	71.1	2 788
1990	541	25.6	1 569	74.4	2 110
1991	527	30.9	1 176	69.1	1 703
Change 1990 – 1991 %	–2.6		–25.0		–19.3

* Includes the manufacture of radio and television transmitters, radar equipment, microphones, loudspeakers and telephones.
** Includes the manufacture of radios, televisions, VCRs, cassette recorders, sound recordings as well as blank cassettes.

Source: Yearbooks of industrial statistics, Statistics Finland.

1.16 Value of deliveries in entertainment electronics manufacture in Finland 1980 – 1991

	1980	1981	1982	1983	1984	1985	1986
	FIM million						
Colour television sets	572.6	547.9	653.9	785.1	838.1	909.0	1 133.0
Other television sets	3.9	2.4	–	–	–	–	–
Radios, tuners, receivers, stack systems	67.3	14.3	3.4	1.9	1.3	1.2	1.0
Portables/other radios	18.2	5.7	1.5	–	–	–	–
Microphones	0.1	0.2	0.0	0.0	0.1	–	–
Amplifiers	8.2	9.4	11.0	11.9	19.9	14.6	18.1
Loudspeakers	7.2	18.3	20.6	25.5	23.7	27.5	23.5
VCRs	..	0.8	..	..	..	..	..
Tape recorders	–	–	–	–	3.6	2.8	3.1
Records*	3.5	3.2	3.3	3.0	2.2	2.6	2.4
Audio cassettes*	4.5	5.0	5.2	4.7	2.5	2.3	2.3
Video cassettes	..	..	1.4	1.0	0.9	0.6	0.8
Blank video cassettes	..	..	..	..	..	..	..
Other recorded media	..	..	1.6	3.1	4.6	23.1	25.4
Total	685.5	607.2	701.9	836.2	896.9	983.7	1 209.6

1.16 continued

	1987	1988	1989	1990	1991	Change 1990/91
	FIM million					%
Colour television sets	1 309.3	1 132.9	1 015.6	924.5	688.5	–25.5
Other television sets	–	–	–	–	–	–
Radios, tuners, receivers, stack systems	1.0	..	4.4	6.0	7.2	20.0
Portables/other radios	–	–	–	–	–	–
Microphones	0.1	0.1	0.1	0.2	0.8	300.0
Amplifiers	33.2	43.7	42.8	33.4	8.4	–74.9
Loudspeakers	27.3	29.7	24.4	34.3	30.8	–10.2
VCRs	..	6.8	–	–	–	–
Tape recorders	3.4	21.9	16.4	19.3	19.1	–1.0
Records*	2.7	3.1	4.0	3.6	5.8	61.1
Audio cassettes*	2.8	3.0	3.3	2.9	8.7	200.0
Video cassettes	..	1.8	2.6	4.7	7.3	55.3
Blank video cassettes	5.3	6.8	4.5	4.5	–	–100.0
Other recorded media	32.0	24.1	26.6	30.3	36.4	20.1
Total	1 417.1	1 273.9	1 144.7	1 063.7	813.0	–23.6

* Does not include language records and cassettes.

Source: Yearbooks of industrial statistics, Statistics Finland.

1.17 Exports and imports of entertainment electronics in 1980 and 1985 – 1992

		1980	1985	1986	1987	1988	1989	1990	1991	1992
		FIM million								
Colour television sets	Exports	438.7	604.4	913.1	1 060.6	801.8	672.3	753.0	601.0	554.2
	Imports	116.4	160.4	170.1	204.0	221.0	279.0	287.6	300.8	278.8
Other television sets	Exports	2.6	0.2	0.2	0.1	0.4	0.4	0.7	0.0	1.1
	Imports	24.3	7.7	6.0	3.2	6.0	3.0	2.7	2.2	1.5
Car radios	Exports	0.2	0.6	1.2	1.5	4.0	5.7	2.6	3.7	4.5
	Imports	37.0	75.8	92.2	102.3	128.7	139.0	119.1	90.8	93.4
Portable radio cassette recorders	Exports	52.1	1.2	3.0	2.2	31.1	60.3	50.8	48.4	36.3
	Imports	58.1	105.1	89.2	95.7	62.2	66.2	63.0	54.1	49.7
Headphones	Exports	..	..	..	..	0.6	0.9	1.3	0.3	1.3
	Imports	..	..	..	..	9.4	10.7	11.8	12.2	12.6
Stereo/Hi-fi systems	Exports	2.7	1.0	1.2	8.1	1.1	3.2	2.8	2.0	6.1
	Imports	55.0	65.2	55.2	49.8	80.6	104.6	91.8	98.1	74.9
Microphones & stands	Exports	0.3	0.7	0.8	10.2	0.3	3.2	0.6	1.8	3.7
	Imports	5.4	8.0	9.5	10.5	10.5	13.5	13.5	10.1	13.5
Loudspeakers	Exports	10.9	9.9	10.8	19.4	18.3	18.3	23.7	18.3	18.3
	Imports	42.8	68.2	73.9	80.4	89.1	98.0	87.6	68.6	63.4
Turntables	Exports	0.2	0.3	1.9	1.5	0.6	0.8	0.7	0.4	0.7
	Imports	20.6	30.5	46.4	40.0	28.9	33.0	26.8	21.5	13.8
VCRs	Exports	14.1	29.1	50.8	36.7	61.4	6.0	1.1	1.7	6.9
	Imports	37.2	265.9	301.4	283.1	289.1	147.4	24.1	180.6	152.8
Video disc players	Exports	–	–	–	–	1.1	0.8	0.4	0.4	0.6
	Imports	–	–	–	–	2.5	1.4	2.4	2.0	2.7
Tape recorders	Exports	0.9	7.6	13.5	12.5	1.5	1.3	1.5	14.2	27.3
	Imports	51.4	66.2	68.0	55.8	58.3	66.8	55.8	58.3	42.0
LP records*	Exports	2.7	5.0	3.4	2.4	1.4	1.8	0.9	0.8	0.3
	Imports	28.1	44.5	60.5	76.8	51.1	58.0	45.9	31.5	17.0
Compact discs	Exports	..	..	..	..	0.5	1.3	1.9	1.6	6.6
	Imports	..	..	..	..	31.1	47.2	61.8	83.3	108.2
Audio cassettes*	Exports	1.6	1.5	1.0	1.3	1.2	0.9	0.7	0.7	0.5
	Imports	9.2	13.9	16.9	20.9	22.3	27.2	26.7	24.9	22.4
Video recordings	Exports	..	1.6	1.5	0.9	1.3	1.1	2.7	3.6	4.1
	Imports	..	41.3	35.9	34.2	60.2	80.8	68.3	92.7	31.8
Video cassettes	Exports	..	0.7	0.2	0.7	1.8	0.8	1.1	0.9	0.9
	Imports	..	49.2	70.0	59.7	76.0	87.0	106.8	80.1	80.9
C cassettes	Exports	0.2	0.2	0.1	0.3	0.4	0.3	0.3	0.0	0.3
	Imports	21.3	29.3	30.5	22.8	22.5	23.9	21.8	17.6	18.3
Total	Exports	527.2	664.0	1 002.7	1.158.4	928.8	779.4	846.7	699.8	673.9
Total	Imports	506.8	1 031.2	1 125.7	1 139.2	1 249.5	1 286.7	1 117.5	1 229.4	1 077.7
Exports-Imports		20.4	–367.2	–123.0	19.2	–320.7	–507.3	–270.8	–529.6	–403.8

* Does not include language records and cassettes.

Source: Foreign trade statistics.

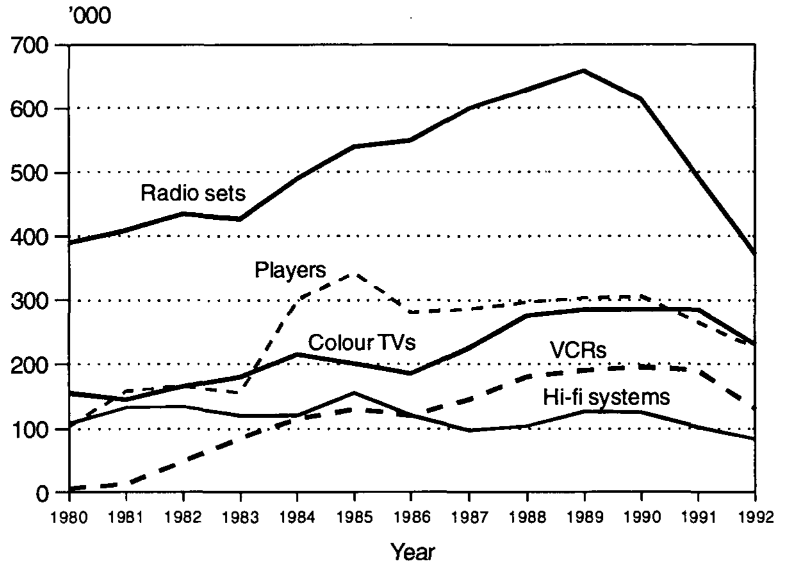
1.18 Retail sales of entertainment electronics 1980 – 1992*

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	Change 1991/92 %
	'000 units													
Colour television sets	155	145	165	180	215	200	185	225	275	285	285	285	230	–19.3
B&W television sets	72	55	50	42	35	28	15	10	7	3	–	–	–	–
VCRs	6	13	48	85	115	130	120	145	180	190	195	190	130	–31.6
Camcorders	–	1	2.5	3	3.5	5	6	8	12	24	30	28	18	–35.7
Home computers	–	–	3	30	50	50	50	45	45	50	55	30	25	–16.7
Hi-fi equipment:														
– tuners	14	26	32	30	30	40	30	12	12	18	15	8	5	–37.5
– amplifiers	15	30	35	33	32	42	32	15	16	24	20	13	10	–23.1
– receivers	31	40	35	30	28	23	18	15	14	14	16	16	11	–31.3
– music centres	48	37	32	27	30	50	40	55	62	70	74	65	57	–12.3
Hi-fi equipment total	108	133	134	120	120	155	120	97	104	126	125	102	83	–18.6
Loudspeakers	100	155	155	140	130	140	110	95	95	95	80	60	40	–33.3
Players:														
– turntables	41	62	65	58	57	65	45	28	22	25	22	13	7	–46.2
– CD players	–	–	–	2	3	8	15	30	45	65	85	85	70	–17.6
– open-reel tape recorders	1	1	1	0.5	–	–	–	–	–	–	–	–	–	–
– tape decks	47	70	75	65	60	70	50	28	29	33	28	22	13	–40.9
– cassette recorders, Walkmans etc.	15	25	25	30	180	200	170	200	200	180	170	145	135	–6.9
Players total	104	158	166	156	300	343	280	286	296	303	305	265	225	–15.1
Radio sets:														
– radio cassette recorders	155	170	200	200	250	280	270	290	275	260	260	212	147	–30.7
– portable radios	35	25	25	30	45	50	60	70	80	75	75	60	45	–25.0
– home & clock radios	70	75	65	45	40	40	45	50	60	85	80	85	75	–11.8
– car radios	130	140	145	152	155	170	175	190	215	240	200	136	105	–22.8

* Data based on estimates provided by the Domestic Appliances Association using various sources, including deliveries of wholesale dealers and foreign trade statistics.

Source: Domestic Appliances Association.

Figure 1.3
Sales of selected entertainment electronics 1980 – 1992



Source: Table 1.18

1.19 Entertainment electronics: average prices and sales volume 1980 – 1992*

		1980	1981	1982	1983	1984	1985	1986
Colour television sets	Average price FIM	2 950	2 900	2 900	3 000	2 850	2 750	2 800
	Sales volume FIM million	457	421	478	540	613	550	518
B&W television sets	Average price FIM	800	800	775	825	800	700	675
	Sales volume FIM million	58	44	39	35	28	20	10
VCRs	Average price FIM	5 100	4 850	4 500	4 450	4 200	3 800	3 500
	Sales volume FIM million	31	63	216	374	483	494	420
Video cameras	Average price FIM	–	5 000	5 000	5 000	4 900	6 000	6 000
	Sales volume FIM million	–	5	12	15	17	12	6
Camcorders	Average price FIM	–	–	–	–	–	10 000	10 000
	Sales volume FIM million	–	–	–	–	–	30	50
Home computers (incl. accessories)	Average price FIM	–	–	2 500	2 000	2 500	2 500	3 500
	Sales volume FIM million	–	–	7	60	125	125	175
Hi-fi equipment:								
– tuners	Average price FIM	950	850	750	800	750	700	750
	Sales volume FIM million	13	22	24	24	22	28	23
– amplifiers	Average price FIM	1 100	1 000	850	950	900	850	950
	Sales volume FIM million	17	30	30	31	29	36	30
– receivers	Average price FIM	1 300	1 200	1 100	1 150	1 100	1 100	1 150
	Sales volume FIM million	40	48	39	34	31	25	21
– music centres with loudspeakers	Average price FIM	2 400	2 150	2 000	2 000	2 000	2 200	2 300
	Sales volume FIM million	115	80	64	54	60	110	92
Hi-fi equipment total	Sales volume FIM million	185	180	157	143	142	199	166
Loudspeakers (separates)	Average price FIM	400	400	360	380	360	360	380
	Sales volume FIM million	40	62	56	53	47	50	42
Players:								
– turntables	Average price FIM	850	800	720	740	740	700	675
	Sales volume FIM million	35	50	47	43	42	46	30
– CD players	Average price FIM	–	–	–	4 000	3 000	2 200	1 900
	Sales volume FIM million	–	–	–	8	9	18	29
– open-reel tape recorders	Average price FIM	3 500	4 500	5 000	5 000	–	–	–
	Sales volume FIM million	4	5	5	3	–	–	–
– tape decks	Average price FIM	1 100	1 050	975	1 050	1 000	950	1 000
	Sales volume FIM million	52	74	73	68	60	66	50
– cassette recorders, Walkmans etc.	Average price FIM	350	400	450	500	300	270	280
	Sales volume FIM million	5	10	11	15	54	54	47
Players total	Sales volume FIM million	96	139	136	137	165	184	156
Radio cassette recorders	Average price FIM	670	680	710	800	750	730	670
	Sales volume FIM million	104	116	142	160	188	204	181
Radio sets:								
– portable radios	Average price FIM	310	340	340	300	280	260	240
	Sales volume FIM million	11	9	9	9	13	13	14
– home & clock radios	Average price FIM	300	270	230	250	260	260	250
	Sales volume FIM million	21	20	15	11	10	10	11
Car radios	Average price FIM	900	950	1 000	1 125	1 250	1 275	1 350
	Sales volume FIM million	117	133	145	171	194	217	236
Sales total	Sales volume FIM million	1 120	1 192	1 412	1 708	2 025	2 108	1 985

continued

1.19 continued

		1987	1988	1989	1990	1991	1992	Change 1991/92 %
Colour television sets	Average price FIM	2 750	2 825	2 800	2 750	2 700	2 700	0.0
	Sales volume FIM million	619	777	798	784	770	621	–19.4
B&W television sets	Average price FIM	600	700	750	–	–	–	–
	Sales volume FIM million	6	5	2	–	–	–	–
VCRs	Average price FIM	3 100	2 875	2 675	2 400	2 100	1 900	–9.5
	Sales volume FIM million	450	518	508	468	399	247	–38.1
Video cameras	Average price FIM	–	–	–	–	–	–	–
	Sales volume FIM million	–	–	–	–	–	–	–
Camcorders	Average price FIM	8 500	8 000	7 200	5 600	5 100	4 900	–3.9
	Sales volume FIM million	68	96	173	168	143	88	–38.5
Home computers (incl. accessories)	Average price FIM	3 500	4 000	4 000	5 000	5 000	4 500	–10.0
	Sales volume FIM million	158	180	200	275	150	113	–24.7
Hi-fi equipment:								
– tuners	Average price FIM	900	950	975	825	950	950	0.0
	Sales volume FIM million	11	11	18	12	8	5	–37.5
– amplifiers	Average price FIM	1 150	1 250	1 350	1 300	1 300	1 350	3.8
	Sales volume FIM million	17	20	32	26	17	14	–17.6
– receivers	Average price FIM	1 350	1 450	1 600	1 600	1 650	1 550	–6.1
	Sales volume FIM million	20	20	22	26	26	17	–34.6
– music centres with loudspeakers	Average price FIM	2 400	2 200	2 200	2 200	2 200	2 600	18.2
	Sales volume FIM million	132	136	154	163	143	148	3.5
Hi-fi equipment total	Sales volume FIM million	180	187	226	227	194	184	–5.2
Loudspeakers (separates)	Average price FIM	420	460	500	525	550	475	–13.6
	Sales volume FIM million	40	44	48	42	33	19	–42.4
Players:								
– turntables	Average price FIM	750	800	850	800	850	650	–23.5
	Sales volume FIM million	21	18	21	18	11	5	–54.5
– CD players	Average price FIM	1 575	1 400	1 300	1 200	1 000	1 100	10.0
	Sales volume FIM million	47	63	85	102	85	77	–9.4
– open-reel tape recorders	Average price FIM	–	–	–	–	–	–	–
	Sales volume FIM million	–	–	–	–	–	–	–
– tape decks	Average price FIM	1 200	1 300	1 400	1 300	1 200	1 150	–4.2
	Sales volume FIM million	34	38	46	36	26	15	–42.3
– cassette recorders, Walkmans etc.	Average price FIM	230	230	260	265	260	300	15.4
	Sales volume FIM million	46	46	47	45	38	41	7.9
Players total	Sales volume FIM million	148	165	199	201	160	138	–13.8
Radio cassette recorders	Average price FIM	600	560	530	530	530	480	–9.4
	Sales volume FIM million	154	154	138	138	112	71	–36.6
Radio sets:								
– portable radios	Average price FIM	215	210	210	215	220	240	9.1
	Sales volume FIM million	15	17	16	16	13	11	–15.4
– home & clock radios	Average price FIM	220	200	170	180	170	160	–5.9
	Sales volume FIM million	11	12	14	14	14	12	–14.3
Car radios	Average price FIM	1 350	1 400	1 450	1 400	1 400	1 500	7.1
	Sales volume FIM million	257	301	348	280	190	158	–16.8
Sales total	Sales volume FIM million	2 106	2 456	2 670	2 613	2 178	1 662	–23.7

* Data based on estimates provided by the Domestic Appliances Association using various sources, including deliveries of wholesale dealers and foreign trade statistics.

Source: Domestic Appliances Association.

1.20 Household consumption expenditure in mass media and share of total consumption expenditure by socio-economic status of head of household in 1990

Socio-economic status of head of household	All households		Farmers		Other self-employed		Upper white-collar		Lower white-collar	
Consumption expenditure	FIM	%	FIM	%	FIM	%	FIM	%	FIM	%
Electronic media total	1 158	26.3	1 135	23.1	1 261	23.1	1 310	20.2	1 240	24.6
Recordings total	954	21.6	863	17.6	1 308	23.9	1 722	26.6	1 265	25.1
Books total	516	11.7	552	11.2	840	15.4	1 054	16.3	632	12.6
Magazines and printed matter total	1 780	40.4	2 364	48.1	2 057	37.6	2 392	36.9	1 897	37.7
Consumption expenditure in mass media total	4 408	100.0	4 914	100.0	5 466	100.0	6 478	100.0	5 034	100.0
Total consumption expenditure	115 117		141 680		164 752		169 267		129 022	
Mass media expenditure as % of total consumption	3.8		3.4		3.2		3.8		3.8	
Number of households	2 154 281		90 667		112 228		302 715		399 625	
Mean number of household members	2.3		3.3		3.1		2.7		2.4	

continued

1.20 continued

Socio-economic status of head of household	Blue-collar		Students		Pensioners		Other economically non-active	
Consumption expenditure	FIM	%	FIM	%	FIM	%	FIM	%
Electronic media total	1 250	27.5	974	24.5	973	35.1	887	27.9
Recordings total	1 169	25.7	1 229	31.0	157	5.7	945	29.7
Books total	469	10.3	734	18.5	171	6.2	266	8.4
Magazines and printed matter total	1 664	36.6	1 032	26.0	1 468	53.0	1 082	34.0
Consumption expenditure in mass media total	4 552	100.0	3 969	100.0	2 769	100.0	3 180	100.0
Total consumption expenditure	123 001		76 873		66 224		82 246	
Mass media expenditure as % of total consumption	3.6		5.1		4.1		3.7	
Number of households	531 131		36 120		644 286		37 509	
Mean number of household members	2.7		1.5		1.5		2.0	

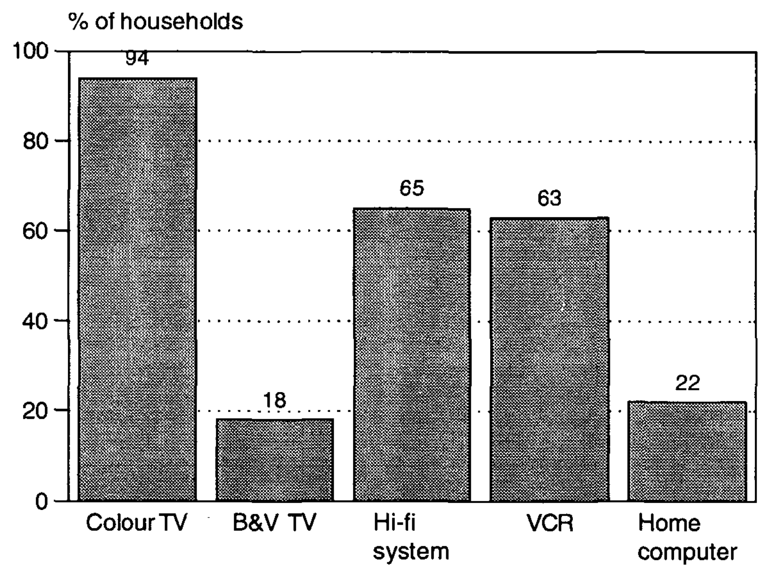
Source: Statistics Finland, Household survey 1990.

1.21 Household ownership of entertainment electronics in 1993 by socio-economic status

	Ownership of entertainment electronics				
	Colour TV	B&W TV	Hi-fi system	VCR	Home computer
	%				
All households	94	18	65	63	22
Farmers	96	31	57	63	19
Other self-employed	95	22	76	70	28
Upper white-collar	95	23	85	75	49
Lower white-collar	96	14	76	74	24
Industrial blue-collar	95	17	72	75	17
Service sector	93	18	67	71	15
Other employees	94	15	67	72	17
Students	91	16	78	67	43
Pensioners	89	17	29	30	3
Others	99	16	72	71	17

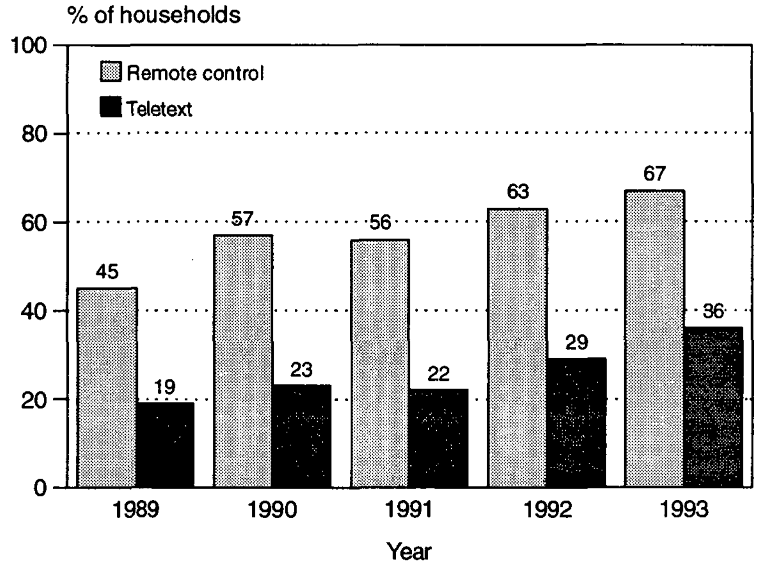
Source: Statistics Finland, Consumer barometer 1993.

Figure 1.4
Ownership of entertainment electronics 1993



Source: Table 1.21

Figure 1.5
Households with remote control and teletext 1989 – 1993



Source: Taloustutkimus Oy/YLE

1.22 Time spent with mass media in 1992 (ages 12–69)*

Activity	All			Sex: Female			Sex: Male			Social group: Manager/upper w-c/self-employed		
	Time spent on average	active on week-days	active on Sat-Sun	Time spent on average	active on week-days	active on Sat-Sun	Time spent on average	active on week-days	active on Sat-Sun	Time spent on average	active on week-days	active on Sat-Sun
	min/day	%	%	min/day	%	%	min/day	%	%	min/day	%	%
Magazines	42.5	73	78	41.0	74	79	43.9	73	77	43.3	76	79
Newspapers	41.4	89	91	37.3	89	92	45.4	89	90	39.3	90	93
Free sheets	3.0	19	21	2.9	20	24	3.1	17	18	3.5	18	17
Direct advertising	3.4	39	35	3.8	44	40	3.0	35	31	3.2	39	40
Books	24.5	38	32	30.2	43	37	18.8	32	26	23.7	40	37
Reading total	114.8			115.3			114.2			113.1		
Television	133.2	80	81	130.7	83	80	135.6	77	81	121.2	79	79
Video	11.5	14	20	9.6	13	18	13.3	15	22	9.4	12	19
Radio	108.4	76	74	113.9	73	71	103.1	79	77	89.7	75	77
Listening and viewing total	253.1			254.2			252.0			220.3		
Mass media total	367.9			369.4			366.2			333.4		

continued

1.22 continued

Activity	Social group: Lower white-collar			Blue-collar			Farmer			Other		
	Time spent on average	active on week-days	active on Sat-Sun	Time spent on average	active on week-days	active on Sat-Sun	Time spent on average	active on week-days	active on Sat-Sun	Time spent on average	active on week-days	active on Sat-Sun
	min/day	%	%	min/day	%	%	min/day	%	%	min/day	%	%
Magazines	36.2	66	81	32.6	73	73	33.9	75	86	59.2	81	80
Newspapers	41.2	94	93	34.3	85	85	30.0	89	96	62.7	90	94
Free sheets	2.8	17	28	1.9	17	24	0.6	9	5	3.9	25	21
Direct advertising	3.5	42	36	3.3	40	32	1.8	34	18	4.3	43	31
Books	24.1	38	31	18.4	31	24	20.5	28	32	28.9	43	30
Reading total	107.8			90.5			86.7			159.1		
Television	126.2	84	86	136.2	77	83	162.5	85	85	167.3	84	76
Video	13.0	15	20	14.8	17	28	18.7	9	12	8.3	13	13
Radio	117.3	75	73	127.1	79	72	92.7	83	87	126.4	79	74
Listening and viewing total	256.5			278.2			273.8			302.0		
Mass media total	364.3			368.7			360.6			461.1		

* The data come from a computer-assisted telepanel involving some 500 households and a total of 940 participants aged 12–69 years. Suomen Gallup Oy collects the data through PCs that it has provided to these households.

Source: Suomen Gallup-Media Oy, Intermedia 1992.

2 Television

Since the mid-1980s Finnish television broadcasting has seen many significant structural changes. The growth of cable television continued to accelerate towards the end of the decade, and satellite channels became increasingly accessible to large audiences. At the same time the number of households with VCR's increased rapidly.

Around the mid-1980s there were widespread fears that the continuing growth of satellite television and video could seriously undermine the "unified culture" represented by Finnish television - as well as its financial basis. As a consequence the public service Finnish Broadcasting Company YLE and the commercial television company MTV Finland intensified their cooperation and started up a third, commercially financed television channel.

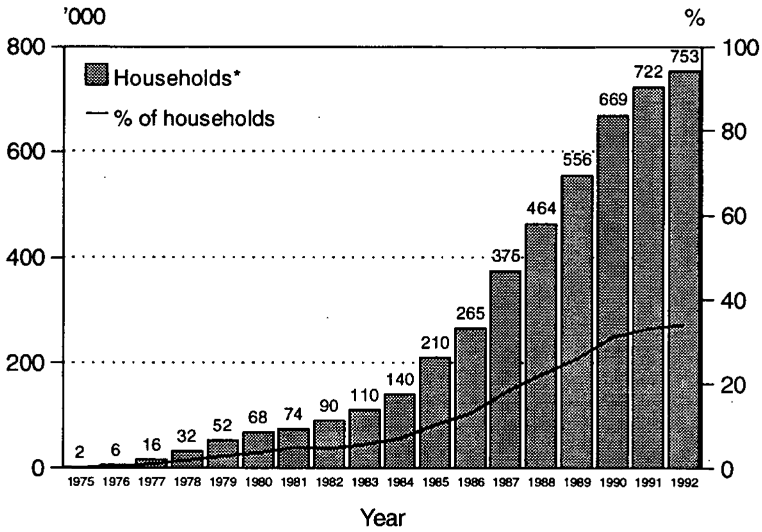
This cooperation led to the founding in autumn 1985 of a new company called Kolmostelevisio ('Channel Three'), which went into broadcasting in autumn 1987. The biggest shareholder in the new third channel was YLE, which held 50 per cent of the share capital, followed by MTV Finland (35 %) and Nokia Telecommunications (15 %). Following a couple of major rearrangements in ownership, MTV Finland now holds 80 per cent of the shares and YLE the remaining 20 per cent.

Since the beginning of regular television broadcasting in Finland in 1957, the commercial MTV Finland had to lease broadcasting time on the public service YLE's two nationwide channels. There have also been various other links of dependency between the two companies: for instance, MTV has broadcast its programmes under YLE's operating licence (until autumn 1993); MTV has occupied an important role as a source of financing in addition to licence fees; YLE has been an important minority shareholder of MTV.

At the beginning of 1993 the two broadcasters, YLE and MTV, were allocated their own channels: YLE1 and YLE2 are now reserved for public service broadcasting while MTV3 Finland operates its own nationwide, full service commercial network under its own operating licence (but still acting as an important source of financing the public service broadcaster YLE).

The new set-up has created a whole new competitive situation; viewer ratings have suddenly become far more important than before. A clear indication of this was received in the form of hastily planned changes in YLE's television programming in early spring 1993. As far as YLE is concerned the current situation is a bit contradictory: On the one hand the continued legitimacy of the public service company is thought to require high viewer

Figure 2.1
Cable television subscribers 1975 – 1992



*Not all subscribers are households.

Source: Table 2.9

ratings for YLE channels; on the other hand, for reasons of funding, good ratings are also called for on MTV's Channel Three.

Cable television expanded very rapidly in Finland throughout the 1980s. In 1980 there were less than 70 000 households wired up to cable networks; the figure for 1985 was over 200 000; and by the end of the decade it had risen to around 670 000. At year-end 1992 the number of cable subscribers was 753 000, which means that over one third of the households in the country were wired up. During the past couple of years the growth in the number of cable television subscribers has slowed down considerably. (Table 2.9.)

In spring 1993 there were 193 cable television operating licences in almost two thirds or 61 % of Finland's local municipalities. As housing companies and network operators with less than 200 subscribers do not require a licence, the data on the numbers of networks and subscribers are not fully accurate. (Figure 2.6.)

At the beginning of 1990 the biggest cable operators from Helsinki, Tampere and Turku joined forces to set up a separate company, PTV, to coordinate program distribution and marketing operations. The cable operators behind PTV are owned by the three biggest newspaper publishers in the country (Sanoma Group, Aamulehti Group and TS Group). PTV has branched out into other towns as well. The company produces a package of prime time programming for some twenty biggest cable networks, and it also coordinates the sale of advertising time.

PTV's programming consists mainly of serials, music, sports and children's programmes as well as locally produced current affairs programmes. At year-end 1992 the company covered around 510 000 households across the country, which translates into over one million potential viewers. (Table 2.10.)

A very substantial part of programming in cable networks consists of programmes transmitted by international satellite operators: Eurosport (716 000 connections at year-end 1992), Super Channel (704 000 connections), TV5 (685 000 connections) and MTV Europe (633 000 connections). At the same time there were 510 000 households in the country with access to PTV. (Table 2.10.)

Legislation entering into force in 1992 gave permission for cable operators to use microwaves in the transmission of their programmes to scarcely populated areas. It is estimated that cable operators might be able to reach between 200 000 and 400 000 potential new subscribers through microwaves. However, no cable operator has as yet announced plans to build a microwave network.

In spring 1992, the Ministry of Communications granted licences to nine operators with plans to start up local television broadcasting. All operators are smallish communication firms, some of which are engaged in local radio or in publishing. The first local television station started up in August 1993 by a joint effort of two licence holders: Krs-tv in Kristiinankaupunki and När-tv from Närpiö.

Housing companies and private households have put up their own satellite dishes to pick up the programmes of a large number of satellite channels. At year-end 1993 it was estimated that the total number of satellite dishes in Finland was between 20 000 and 30 000 and the number of dish homes somewhere between 80 000 and 120 000.

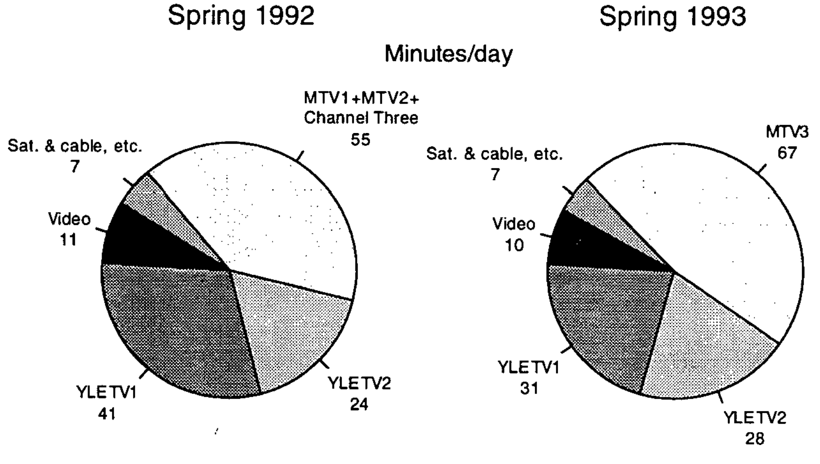
CTV/Scandinavian Card TV, now a subsidiary of Nordic Satellite Distribution A/S which is a joint venture of Scandinavia's biggest cable operators (partly owned by Helsinki Media/Sanoma Group), started business in Finland in spring 1993. It offers a package of satellite channels which in autumn 1993 included six channels. Some of the Eurosport Nordic broadcasts that come with the package have Finnish and Swedish commentary, and there are now plans to have Finnish and Swedish subtitles for some of the programmes of other channels as well. The dish that is required to pick up CTV programmes is smaller and also less expensive than earlier.

In 1993 the average combined reach of YLE channels was 62 per cent of the population; the figures for YLE1 and YLE2 were 53 per cent and 46 per cent, respectively. The daily reach of MTV3 Finland was 59 per cent, i.e. almost the same as the combined figure for the two YLE channels. (Table 2.18.)

The daily reach of satellite channels was 10 per cent and that of cable television 5 per cent of the population. An average 29 per cent of the population wired up to cable networks watch at least some satellite channel, while 15 per cent report that they watch some cable channel. (Tables 2.18 and 2.19.)

In 1993 average daily viewing times were just over two hours a day. The annual figures have been slowly increasing during the 1990s. (Table 2.20.) In households that are wired up to cable networks, some 15 per cent of total viewing time is spent with other than the three national television channels. (Tables 2.20 and 2.21.)

Figure 2.2
Breakdown of television viewing by channel in spring 1992 and 1993; whole population



Sources: Tables 2.20 and 5.7

During its operational year 1991/92 YLE's weekly programming on its two national channels amounted to 103 hours, up by roughly one quarter from the figure recorded in the mid-1980s. In 1993 programming volumes increased further to 136 hours as YLE started to fill in the gaps that were left when MTV moved over onto its own channel. MTV's programming volumes on the two national channels operated by YLE remained more or less constant at about 20 hours a week from the early 1980s up until the reorganization in 1993. In 1993, after the channel allocation the average weekly programming volume on MTV3 was 69 hours. (Table 2.11.)

Domestic production accounts for a rather large part of the programming of both national television companies in Finland. Over half of YLE's programming is domestic; the figure for MTV's programmes that were broadcast through YLE channels in the early 1990s was around 40 per cent. In 1991/92, over half of Channel Three programming was domestic production. (Table 2.13.)

In 1992 the number of TV licences in Finland started to decline, for the first time in the history of Finnish television. At year-end 1993, the number of licences was over 30 000 less than two years earlier (Table 2.8). In 1993 a total of 1.9 million TV licences were purchased; 97 per cent of these were for colour sets.

In 1993 YLE's revenues totalled around FIM 1.85 billion, over 80 per cent of which comes from licence fees. The proportion of channel leasing charges from MTV has been declining; the share of compensations paid by MTV out of YLE revenues peaked in the mid-1980s at almost one quarter of the total. In recent years the share of the charges paid by MTV/MTV3 has been around 15 per cent. (Table 2.1.)

Measured in terms of turnover, YLE is one of Finland's biggest companies in the mass media business: in fact it comes second only to the publisher Sanoma Group. Sanoma has several (albeit relatively insignificant as far as turnovers go) connections with the television business (Helsinki Televisio Oy, Eurocable Oy, shareholding in PTV, etc.)

MTV3 showed a turnover of FIM 709 million in 1993. The main source of income for MTV is advertising revenue. A substantial part of MTV's revenue goes to YLE in the form of network leasing fees. As we saw earlier, these payments have accounted for around 15 per cent of YLE's income. Cable television showed a turnover of FIM 321 million in 1992. (Tables 2.3. and 2.4.)

In 1992 the Finnish Broadcasting Company employed some 4 600 people; this figure includes radio staff because for technical reasons it is difficult to count television and radio personnel separately. The MTV Group had a staff of approximately 600 in 1992. Staff numbers have been slowly declining in both companies during the past few years. (Tables 2.5 and 2.6.)

The number of people engaged full-time in cable television operations was just short of 300, of whom less than ten per cent were in editorial positions. These figures do not include cable network staff working for the Telecommunications authority. (Table 2.7.)

Statistical sources

Most of the data on finances, broadcasting volumes and staff numbers at YLE and MTV are from the annual reports and yearbooks of the respective organizations.

Most data concerning the programming structure of YLE and MTV are based on reports by YLE's Research and Development Unit.

Data on cable television operations in Finland are published annually by the Ministry of Communications. Data have also been obtained from the Finnish Cable Television Association and PTV.

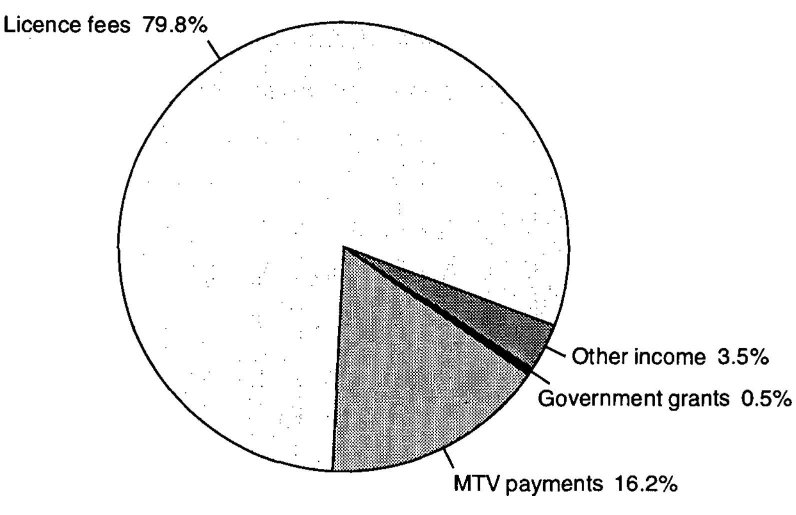
Statistics on television viewing are nowadays based on summary reports from year-round tv-meter surveys. The sample consists of 475 households and a total of 1 200 persons. The metered audience measurements have been jointly commissioned by YLE, MTV and the Finnish Association of Advertising Agencies. The surveys are conducted by Finnpanel Oy.

2.1 YLE revenues 1980/81 – 1993

Year	Licence fees		MTV payments		Channel Three payments		Government grants		Other income		Total	
	FIM million	%	FIM million	%	FIM million	%	FIM million	%	FIM million	%	FIM million	%
1980/81	511.7	76.0	149.8	22.2			1.2	0.2	11.0	1.6	673.7	100.0
1981/82	604.4	76.0	174.0	21.9			1.6	0.2	15.7	2.0	795.7	100.0
1982/83	692.8	76.2	199.7	22.0			2.3	0.3	13.7	1.5	908.5	100.0
1983/84	837.0	77.4	230.7	21.3			2.4	0.2	12.0	1.1	1 082.1	100.0
1984/85	889.3	76.3	262.5	22.5			4.4	0.4	9.7	0.8	1 165.9	100.0
1985/86	928.3	74.8	291.8	23.5			6.5	0.5	14.8	1.2	1 241.4	100.0
1986/87	1 010.2	74.7	309.8	22.9	2.2	0.2	12.5	0.9	16.9	1.2	1 351.6	100.0
1987/88	1 054.2	76.9	267.1	19.5	8.6	0.6	16.3	1.2	24.9	1.8	1 371.1	100.0
1988/89	1 127.4	77.2	276.6	19.0	16.8	1.2	11.4	0.8	27.5	1.9	1 459.8	100.0
1989/90	1 234.4	77.5	294.6	18.5	27.0	1.7	7.5	0.5	29.8	1.9	1 593.3	100.0
1990/91	1 364.8	81.1	240.7	14.3	31.9	1.9	7.8	0.5	38.5	2.3	1 683.7	100.0
1991/92	1 488.8	82.3	221.7	12.3	47.1	2.6	8.5	0.5	43.4	2.4	1 809.5	100.0
1993	1 481.2	79.8	300.0	16.2	–	–	9.2	0.5	64.7	3.5	1 855.1	100.0

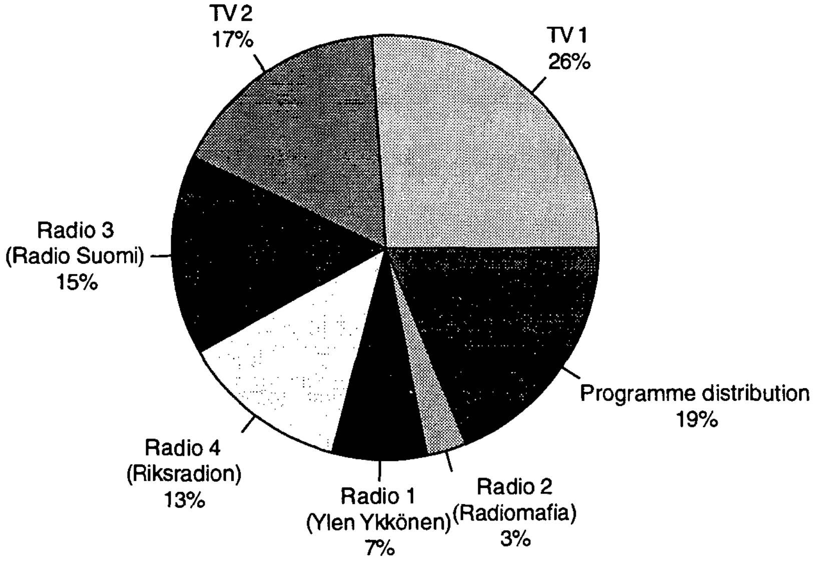
Sources: YLE annual reports.

Figure 2.3
YLE revenues in 1993



Source: Table 2.1

Figure 2.4
Allocation of licence fee by channel 1993



Source: Yle/Information

2.2 Allocation of licence fee to different functions in 1993

Function	FIM
Entertainment etc.	185
Programme distribution	156
Information	124
Swedish-language programming	109
Culture	104
Regional and local operations	85
Children's programmes	28
Foreign broadcasts	14
Education	13
Crisis preparation	7
Sami programming	3
Licence fee total	828

Source: YLE Information.

2.3 MTV* and Channel Three turnover 1980 – 1993

Year	MTV					Channel Three
	Advertising time	AV unit	Laboratory	Other services	Total	
	%				FIM million	FIM million
1980	..	..	..	..	236.5	
1981	..	..	..	..	290.5	
1982	93.8	2.9	1.8	1.5	339.5	
1983	92.8	3.2	1.5	2.5	395.5	
1984	92.7	3.1	1.2	3.0	476.5	
1985	93.7	2.7	1.4	2.2	500.8	
1986	93.1	2.5	1.8	2.6	507.1	
1987	91.9	2.6	1.2	4.3	517.4	..
1988**	..	..	..	..	498.4	96.0
1989	..	..	..	..	536.1	127.0
1990***	..	..	..	..	674.9	(151.3)
1991	..	..	..	..	663.3	(177.0)
1992	..	..	..	..	706.4	(259.0)
1993	..	..	..	..	708.9	

* As from 1983 turnover of MTV Group, which in 1993 consisted of the following companies: MTV Oy, Oy Kolmostelevisio Ab (Channel Three), MTV-Palvelukiinteistöt Oy, Tuotantoyhtiö FOR Oy, Spede-Team Oy, Funny Films Oy and Spedevideo Oy.

** The figure for Channel Three in 1988 is calculated on the basis of total turnover for the period from 1 Jan 1988 to 31 May 1989.

*** As from the beginning of 1990 Channel Three has been a subsidiary of the MTV Group. Its turnover is included in the figures for the whole Group.

Source: MTV annual reports.

2.4 Cable television turnover 1985 – 1992

	1985	1986	1987	1988	1989	1990	1991	1992
	FIM million							
Connection charge	..	..	..	..	..	136	92	55
Subscription fees	..	..	..	..	..	89	114	127
Pay-tv revenue	..	..	..	..	..	55	70	102
Advertising revenue*	..	..	..	..	..	17	18	21
Other income	..	..	..	..	..	17	7	17
Total	44	55	161	224	190	314	301	321
	%							
Connection charge	..	..	..	..	..	43	31	17
Subscription fees	..	..	..	..	..	28	38	39
Pay-tv revenue	..	..	..	..	..	18	23	31
Advertising revenue*	..	..	..	..	..	5	6	7
Other income	..	..	..	..	..	5	2	5
Total						100	100	100

* Includes PTV.

Source: Ministry of Communications, Communications Administration Department.

2.5 YLE personnel during financial years 1980/81–1992 and staff breakdown by units in autumn 1992

	Employees on average/financial year		
	Permanent	Fixed-term	Total
	Number		
1980/81	4 027	403	4 430
1981/82	4 180	357	4 537
1982/83	4 237	439	4 676
1983/84	4 300	441	4 741
1984/85	4 342	471	4 813
1985/86	4 411	468	4 879
1986/87	4 459	397	4 856
1987/88	4 445	354	4 799
1988/89	4 369	365	4 734
1989/90	4 369	364	4 733
1990/91	4 398	397	4 795
1991/92	4 361	414	4 775
1992 (7 months)	4 250	396	4 646*

	Employees by unit 1 June – 31 Dec 1992	
	Number	%
Central Office	61	1.3
Information	27	0.6
Corporate Development	48	1.0
Radio	358	7.7
TV1	1 111	23.9
TV2	662	14.2
Swedish Radio & TV	315	6.8
News and Regional Programmes	832	17.9
Resources Administration	1 232	26.5
Total	4 646	100.0

* On 31 Dec 1992 a total of 1 199 persons were engaged in programming and programme planning jobs.

Source: YLE Personnel Administration.

2.6 MTV* personnel 1980 – 1992

Year	No. of employees
1980	567
1981	638
1982	657
1983	655
1984	665
1985	702
1986	696
1987	667
1988	586
1989**	625
1990	621
1991	626
1992	606

* As from 1983 MTV Group.
** Channel Three personnel are included in the figures as from 1989.

Source: MTV annual reports.

2.7 Cable operators' personnel in 1990, 1991 and 1992

	Number of employees		
	1990	1991	1992
Full-time personnel *			
Programming	27	29	23
Technical	119	169	142
Administration & marketing	139	159	151
Total	285	398	316

* Personnel under Telecom's cable networks (72 networks) are not included in the figures; in 1992 their permanent staff numbered 35.

Source: Ministry of Communications, Communications Administration Department.

2.8 Television licences 1980 – 1993*

Year	B&W TV licences		Colour TV licences		TV licences total
	'000	per 1 000 population	'000	per 1 000 population	'000
1980**	752.2	157	786.0	164	1 538.2
1981	689.8	144	923.8	192	1 613.6
1982	613.8	127	1 064.4	220	1 678.2
1983	533.4	110	1 204.4	248	1 737.8
1984	439.4	90	1 330.7	273	1 770.1
1985	344.6	71	1 439.7	296	1 784.3
1986	287.5	58	1 534.9	312	1 822.4
1987	236.7	48	1 606.2	326	1 842.9
1988	185.3	37	1 677.2	339	1 862.5
1989	147.3	30	1 731.9	349	1 879.2
1990	118.3	24	1 775.2	355	1 893.5
1991	96.3	19	1 801.0	358	1 897.3
1992	78.8	16	1 808.9	358	1 887.6
1993	64.4	13	1 801.7	356	1 866.1

* At year-end.

Source: YLE.

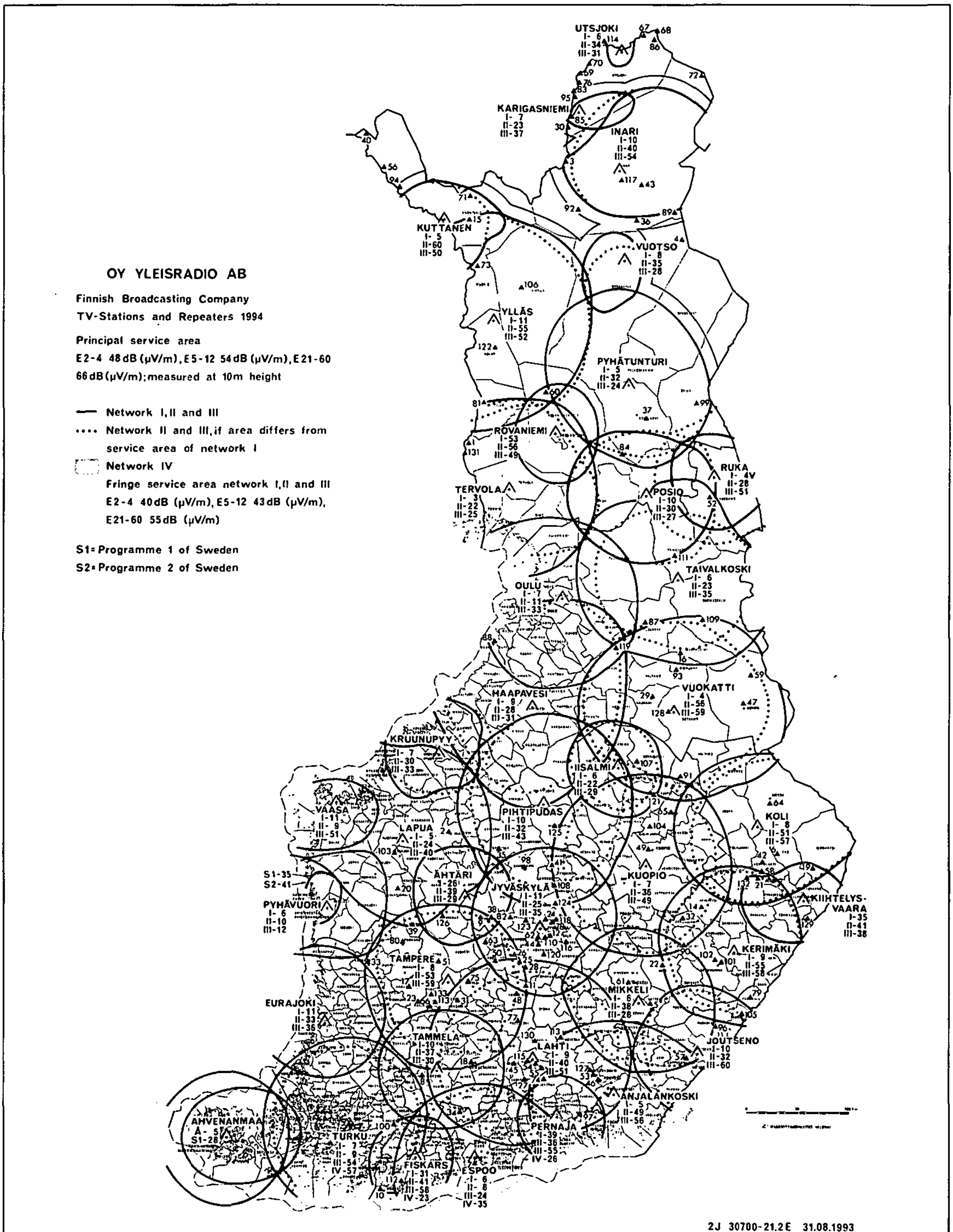
2.9 Cable television connections 1975 – 1992

	'000	% of households*
1980	68.0	3.6
1981	74.0	4.9
1982	90.0	4.6
1983	110.0	5.6
1984	140.0	7.0
1985	210.0	10.3
1986	265.0	13.0
1987	375.0	18.0
1988	464.0	22.1
1989	556.0	25.9
1990	669.0	31.1
1991	722.1	33.0
1992	753.1	34.0

* Not all connections are households.

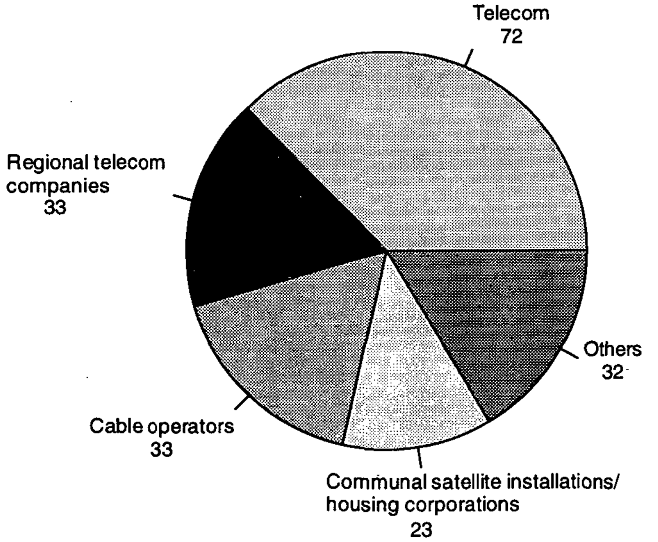
Sources: Finnish Cable Television Association; Ministry of Communications, Communications Administration Department.

Figure 2.5
Coverage area of nationwide television channels and TV4*



* TV4 retransmits a mix of the programming by Swedish TV1 and TV2 in Finland.

Figure 2.6
Cable operation licences in 1993



In spring 1993 there were cable television licences in 281 or 61 % of Finland's local municipalities.

Source: Ministry of Transport and Communications, Communications Administration Department.

2.10 Major channels retransmitted via cable networks at year-end 1992

	Number of connections	Per cent of households with access to cable networks*	Funding
	'000	%	
Satellite channels			
Eurosport	716	95.1	advertising
Super Channel	704	93.5	advertising
TV 5	685	91.0	public funding
MTV-Europe	633	84.1	advertising
Worldnet	327	43.4	public funding
Neighbouring countries			
Swedish TV1	213	28.3	public funding
Swedish TV2	205	27.2	public funding
Moscow TV	188	25.0	public funding
Pay TV/Cable channels			
PTV	510	67.7	advertising
FilmNet	52	6.9	subscription fees
Viihdekanava	15	2.0	subscription fees

* Not all connections are households. At year-end 1992 the total number of households with access to cable television was 753 100.

Sources: Ministry of Communications, Communications Administration Department; Finnish Cable Television Association; Sanoma Group annual report 1992.

2.11 YLE, MTV and Channel Three/MTV3: weekly broadcasting hours by channels 1980 – 1993

Year	YLE		MTV		Channel Three/MTV3*
	TV 1	TV 2	MTV 1	MTV 2	
	Hours/week				
1980/81	40	29	13	4	
1981/82	40	30	13	6	
1982/83	40	30	13	7	
1983/84	41	34	13	7	
1984/85	45	36	13	7	
1985/86	42	36	13	7	
1986/87	44	38	14	6	
1987/88	48	42	13	7	..
1988/89	48	41	12	7	38
1989/90	52	43	12	8	50
1990/91	56	44	11	10	48
1991/92	58	45	11	10	61
1992	59	45	10	10	61
1993	76	60	–	–	69

* From the beginning of 1993: MTV3 Finland.

Sources: YLE annual reports and yearbooks; MTV and MTV3 annual reports.

2.12 Breakdown of YLE and MTV television programming by type of programme 1980/81 – 1991/92

Programme type	1980/81*			1985**			1989/90*			1990/91*			1991/92*		
	YLE	MTV	Total	YLE	MTV	Total	YLE	MTV	Total	YLE	MTV	Total	YLE	MTV	Total
	%														
News	11	–	9	13	11	12	9	11	9	7	11	8	7	11	7
Current affairs	5	6	5	7	2	6	7	7	7	7	6	7	8	1	7
Factual/information programmes	25	14	23	22	8	19	24	5	21	22	5	19	23	4	21
Educational programmes	8	–	7	3	–	3	5	–	4	4	–	3	4	–	3
Theatre, TV films	5	7	5	6	2	5	6	5	6	5	2	5	5	2	5
Feature films	7	20	9	7	11	8	7	12	8	10	14	11	10	14	11
Serials	5	30	9	10	40	16	10	40	15	10	43	15	11	48	17
Entertainment	4	20	7	6	20	9	5	18	6	3	13	5	3	10	4
Music programmes	5	2	4	5	2	4	5	1	4	7	5	6	6	8	6
Sports	12	–	10	7	2	6	8	–	7	11	–	10	11	–	10
Children's programmes	12	1	10	12	3	10	13	–	11	11	–	9	10	3	9
Others	2	–	1	2	–	2	2	–	2	2	–	2	2	–	2
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

* Programming of whole operational year.
** Data based on a sample.

Source: YLE Research and Development.

2.13 Finnish vs. foreign production in YLE and MTV* television programming and the share of domestic programming in different types of programmes 1980/81 – 1991/92

	1980/81			1985/86			1990/91			1991/92			
	YLE	MTV	Total	YLE	MTV	Total	YLE	MTV	Total	YLE	MTV	Total	Channel Three
	%												
Finnish production	61	45	58	54	50	53	55	44	53	54	37	52	54
Foreign production	33	55	37	42	50	44	40	56	42	40	63	44	47
International picture signal**	6	–	5	4	–	3	6	–	5	6	–	4	–
Total	100	100	100	100	100	100	100	100	100	100	100	100	100
Finnish programming as % of different types of programme:													
News	100	–	100	..	..	..							
Current affairs	100	100	100	..	..	..							
Factual/information	56	60	56	..	..	..	73	95	75	73	98	75	..
Educational	74	–	74	..	..	..							
Theatre	44	65	49	..	..	..							
TV films							26	13	24	30	14	28	..
Feature films	11	27	18	..	..	..							
Serials	16	4	9	..	..	..	6	7	6	5	4	4	..
Entertainment***	84	90	87	..	..	..	57	97	68	64	100	73	..
Music programmes	59	72	61	..	..	..	42	100	44	53	100	54	..
Sports	48	–	48	..	..	..	48	–	48	45	–	45	..
Children's	63	8	61	..	..	..	66	–	66	62	–	60	..
Others (mainly lotto)	95	–	95	..	..	..	71	100	72	75	–	75	..

* The figures on MTV's production differ somewhat from the data given in the company's annual reports.
** Programmes technically produced by a foreign broadcaster but edited for the Finnish audience with Finnish commentary, such as international sports events (figures for 1985/86 are estimates).
*** Includes light music.

Source: YLE Research and Development.

2.14 Breakdown of foreign television programming broadcast by YLE and MTV by country of origin 1980/81 – 1991/92

Country of origin	1980/81		1985/86		1990/91		1991/92		
	YLE	MTV	YLE	MTV	YLE	MTV	YLE	MTV	Channel Three
	%								
Scandinavia									
Sweden	15.1	2.5	9.8	0.8	6.3	1.9	5.3	3.8	0.4
Others and co-production	9.2	0.1	7.4	–	9.0	–	6.9	–	0.3
Other Europe									
Great Britain	14.9	21.4	24.5	27.4	26.2	10.5	29.3	6.3	9
France	5.5	8.6	5.2	2.1	6.9	2.7	7.0	4.5	2
Germany	6.9	2.6	9.6	2.9	7.4	4.1	7.8	8.3	–
Soviet Union/Russia	3.8	1.0	4.7	1.4	2.9	1.0	2.0	–	0.2
Others and co-production	18.8	6.3	12.3	3.7	5.6	0.8	9.9	2.9	2.1
North America									
United States	18.4	54.0	16.3	60.1	19.5	76.5	19.0	68.4	81.1
Canada	2.5	0.1	2.2	0.1	3.1	0.2	3.7	0.4	1.6
Central America South America	0.2	0.4	1.0	–	0.5	–	0.8	–	–
Asia and Australia	4.3	2.6	7.0	1.5	7.8	2.3	8.4	5.6	3.1
Africa	–	–	0.0	–	0.2	–	–	–	0.2
Others and co-production	0.5	0.3	0.0	–	5.7	–	–	–	–
Total	100	100	100	100	100	100	100	100	100
Hours	1 093	423	1 635	518	2 362	514	2 443	557	1 140
Foreign programmes as % of total programming	33	55	42	50	40	56	40	63	47

Source: YLE Research and Development.

2.15 Foreign sales of YLE programmes 1980/81 and 1985/86 – 1991/92

	1980/81	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92
	%							
Scandinavia	14	14	12	16	10	3	14	20
Other Europe	46	67	72	57	72	89	73	70
North America	0	6	2	9	6	1	1	2
Other countries	40	13	14	17	11	7	11	8
	100	100	100	100	100	100	99	100
Hours total	77	74	78	88	83	94	82	77

Source: YLE.

2.16 Foreign sales of MTV programmes 1985 – 1992

	1985	1986	1987	1988	1989	1990	1991	1992
	%							
Scandinavia	23	41	16	10	6	5	5	11
Other Europe	63	36	61	70	74	68	73	65
North America	1	4	3	1	2	1	1	0
Other countries	13	19	21	19	18	26	21	24
	100	100	100	100	100	100	100	100
Hours total	63	57	80	142	149	157	118	68

Source: Oy MTV, FinnImage

2.17 Foreign sales of MTV programmes by types of programme 1985 – 1992

Programme type	1985	1986	1987	1988	1989	1990	1991	1992
	%							
Nature programmes	71	56	54	67	76	62	65	64
Documentaries	7	14	11	9	5	6	10	13
Entertainment	6	10	20	22	12	29	22	1
Drama	3	20	16	2	8	3	3	–
Films	11	–	–	–	–	–	–	15
Children's programmes	–	–	–	–	–	–	–	7
	100	100	100	100	100	100	100	100
Hours total	65	57	80	135	148	156	118	79

The figures by type of programme differ somewhat from those given in Table 2.16.

Source: Oy MTV, FinnImage

2.18 Daily reach of television programmes 1987/88–1993

	1987/88	1988/89	1989/90	1990/91	1991/92	Spring '92*	Spring '93*	1993 whole year
	%							
YLE1	53	52	51	53	53	57	54	53
YLE2	41	38	38	41	41	44	48	46
YLE total	62	60	59	60	61	64	64	62
MTV1 & MTV2	52	50	48	49	49	52	–	–
Channel Three/MTV3	7	15	19	26	34	42	62	59
TV4			1	2	2	..	2	2
Sveriges TV			2	3	3	..	3	3
Satellite	9	3	6	8	8	9	10	10
Cable			2	3	4	4	5	5

* Jan-May 1992 and 1993.
The data for 1987 onwards are based on continuous, metered monitoring and are averages for the whole year.
The sample of the peoplemeter study consists of 475 households or a total of some 1 200 people.

Sources: Finnpanel Oy; YLE Research and Development.

2.19 Daily reach of television programmes in different population groups in spring 1993

Population group	Jan-May 1993							
	YLE1	YLE2	YLE1+YLE2 Total	MTV3	TV4	SVE	SAT	CABLE
	%							
All	54	48	64	62	2	3	10	5
Sex								
Women	55	48	65	63	2	3	8	5
Men	54	47	63	61	3	3	13	6
Age								
3 – 9 years*	39	35	52	47	0	3	6	2
10 – 14 years	40	37	52	57	1	1	8	2
15 – 24 years	34	31	43	46	2	2	11	5
25 – 34 years	47	42	57	56	2	3	11	8
35 – 44 years	57	49	67	65	3	3	12	6
45 – 64 years	63	53	71	66	2	3	10	5
65 – years	72	66	81	77	3	5	9	4
Occupation								
Farmer	61	55	71	70	1	2	1	0
Industrial blue-collar	61	56	72	69	3	2	7	5
Lower white-collar	61	53	70	66	2	3	12	7
Upper white-collar	57	48	67	60	5	6	18	6
Student	35	31	44	48	1	2	10	4
Video ownership								
Has video	52	46	61	61	2	3	11	5
Access to cable TV								
Has access	54	47	63	61	3	6	29	16

* All other data in the Table describe viewing for age groups over 9.

Sources: Finnpanel Oy; YLE Research and Development.

2.20 Daily average television viewing time 1987/88–1993

	1987/88	1988/89	1989/90	1990/91	1991/92	Spring '92*	Spring '93*	1993 whole year
	Minutes/day							
YLE1	35	35	32	36	36	41	31	31
YLE2	23	20	20	21	22	24	28	27
YLE total	62	58	56	61	61	68	62	59
MTV1 & MTV2	29	27	26	27	24	26	–	–
Channel Three/MTV3	4	8	11	16	22	29	67	60
TV4			0	0	0	0	0	0
Sveriges TV			1	1	2		1	1
Satellite	6	5	2	3	3	7	5	5
Cable			0	0	1		1	1
All channels total	101	98	96	108	113	130	136	126

* Jan-May 1992 and 1993.
The data for 1987 onwards are based on continuous, metered monitoring and are averages for the whole year.
The sample of the peoplemeter study consists of 475 households or a total of some 1 200 people.

Sources: Finnpanel Oy; YLE Research and Development.

2.21 Daily average television viewing time in different population groups in spring 1993

Population group	Jan-May 1993							
	YLE1	YLE2	MTV3	TV4	SVE	SAT	CABLE	Total minutes
	Minutes/day							
All	31	28	67	0	1	5	1	136
Sex								
Women	32	28	72	0	1	2	1	141
Men	31	28	62	0	1	7	2	135
Age								
3 – 9 years*	14	13	33	0	1	2	0	68
10 – 14 years	16	15	54	0	0	5	0	94
15 – 24 years	12	14	46	0	0	5	1	82
25 – 34 years	21	21	56	0	1	4	2	110
35 – 44 years	31	26	65	0	1	6	2	136
45 – 64 years	39	34	70	0	1	4	1	155
65 – years	58	49	107	0	3	5	1	229
Occupation								
Farmer	33	34	87	0	2	0	0	161
Industrial blue-collar	36	37	82	0	1	2	1	165
Lower white-collar	38	31	70	0	1	5	2	152
Upper white-collar	37	27	55	0	3	11	3	140
Student	13	14	47	0	0	5	1	83
Video ownership								
Has video	27	25	64	0	1	5	2	128
Access to cable TV								
Has access	30	26	63	0	2	14	4	144

* All other data in the Table describe viewing for age groups over 9.

Sources: Finnpanel Oy; YLE Research and Development.

2.22 Breakdown of total viewing time (YLE and MTV) by types of programme on an average day* 1980–1991/92

	Autumn					Whole operational year				
	1980	1982	1984	1985	1986	1987/88	1988/89	1989/90	1991/92 YLE	1991/92 MTV
	%									
News	11	15	17	17	15	13	15	14	13	12
Current affairs	9	6	9	7	7	8	8	9	11	4
Factual/information	12	8	9	10	9	12	11	14	16	4
Education (evening)	1	1	1	1	1	1	–	1	1	–
Theatre and TV films	6	5	3	4	7	4	4	5	5	2
Feature films	21	17	11	8	13	12	10	10	11	17
Serials	14	19	17	25	20	20	21	21	11	34
Entertainment	10	15	19	15	16	13	11	11	4	16
Music	5	1	2	3	1	1	1	2	4	7
Sports	4	5	4	6	6	11	13	8	18	–
Children's programmes	5	7	7	3	4	4	3	4	5	2
Others	1	1	1	1	1	1	1	1	1	2
Total %	100	100	100	100	100	100	100	100	100	100

* Daytime viewing not included.

Source: YLE Research and Development.

2.23 Most popular teletext pages 1993

Pages mentioned	%
Home news	52
Sport	49
Weather	47
TV programmes	44
Football & lotto results	38
World news	32
Recipes	24
MTV3 pages	21
Indexes	21
Front page	20
Air travel	17
Job opportunities/Training	13
MTV3 commercials	12
YLE programming	11
Exchange rates, stock exchange, interest rates	10
Children's page	9
Betting tips	9
Weather at skiing resorts	8

Sources: Taloustutkimus Oy; YLE.

3 Radio

The Finnish radio system has been completely reorganized during the past few years. The first commercial local radio stations went on the air in 1985. The Finnish Broadcasting Company YLE responded quickly, increasing its broadcasting volumes and re-profiling its radio channels. One important move in YLE's response was to upgrade its third channel into a nationwide network. At the same time, the volume of regional broadcasts shot up. (Table 3.1.)

Following a brief trial period, the number of privately-owned local radio stations began to increase very rapidly. By 1990, the reach of local radio stations, i.e. the number of people who could tune into some such station, was estimated at around four million.

During the early part of the 1990s the number of local radio stations in Finland has started to fall off from the peak figure of 66 in 1990. At the end of 1993, there were 56 stations in operation, 50 of these being commercial and 6 non-commercial. (Table 3.3.)

Most of the stations that have closed down have been forced out of the business by financial difficulties. From the time that the first licences were granted to year-end 1993, a total of 21 local radio stations had closed down, most of them during the 1990s. This figure includes those stations that have been merged with some other local operator. (Table 3.3.)

The stations that went out of business during the early years of local radio were typically setups operated on a more or less amateur basis in small local municipalities. In recent years, however, stations have also been going under in larger towns with two or more rival stations.

In response to the competition represented by the growth of local radio stations, YLE has re-profiled its radio programming on two separate occasions.

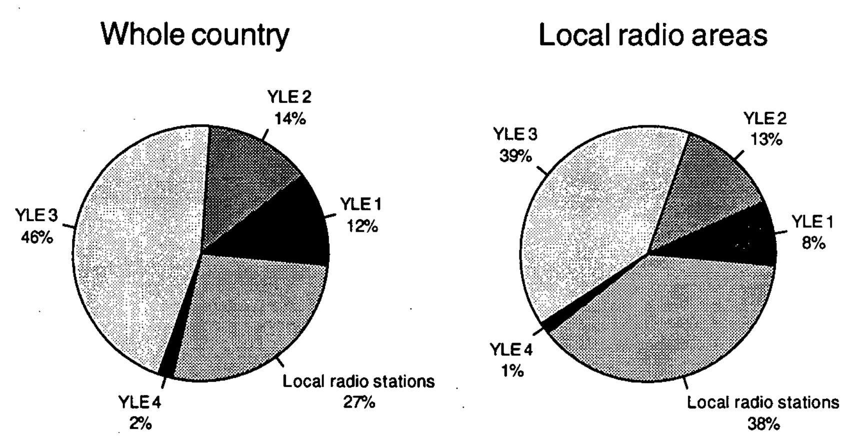
The latter reform in summer 1990 entailed the establishment of YLE Radio 1 as a classical music and cultural programming station; Radio 2 (or "Radiomafia") as a young people's pop and rock channel; and Radio 3 (or "Radio Finland") as a news, regional programmes and popular music channel. The fourth channel continues as a full-service network for the Swedish-speaking audience in Finland ("Riksradion").

In volume terms YLE's radio broadcasting operations are quite impressive. In 1993, YLE's weekly broadcasting through its four nationwide channels amounted to 568 hours. However, growth rates have been even higher in regional programming, increasing from less than 200 weekly hours in the mid-1980s (operational year 1985/86) to over 700 weekly hours in 1993. The average figure for the country's privately-owned local radio stations in 1992 was 108 weekly hours. (Tables 3.1 and 3.2.)

It was very much through local radio that the concept of broadcast flow was imported to Finland. YLE soon followed suit and adopted the model on two of its radio channels (Radiomafia and Radio Finland). In this model, radio programmes do not consist of separate entities that are broadcast under their own titles in a given programme slot at a certain time; in its extreme form, the broadcast flow consists of a continuous, streamlined flow of programming extending from early morning to late evening (or even round the clock) and in this sense constituting one single "programme". The style and atmosphere is tuned on the basis of the assumed preferences of the target audience mainly by means of music. On many radio stations music has indeed become a key element in creating the station's profile and style.

After the radio reforms, measurement of the structure of radio programming became problematic: the old programme classifications have largely lost their meaning with the new profiles.

Figure 3.1
Radio listening time by channel in 1992; whole country and local radio areas



Source: Table 3.9

During the early 1980s there was a clear drop in the daily reach of radio (i.e., the share of the population tuning in to at least one radio station on an average day), but with the mushrooming of local radio stations the figure began to rise again towards the end of the decade. Daily reach has increased quite significantly after the 1990 radio reform: in the early 1990s, the reach of radio has been over 80 per cent of the population. (Table 3.7.)

Since the beginning of local radio there has also been a marked increase in listening times. Towards the end of the 1980s average daily listening times increased from over two to about three hours. It seems that YLE's radio reform has served to push up these figures further still. In autumn 1993, the daily average listening time exceeded three and a half hours a day. (Table 3.9.)

In autumn 1993 people spent on average two and a half hours listening to YLE's channels every day; local radio stations took up over one hour of the average daily listening time. In local radio reception areas, average listening times on YLE channels were just over two hours and on local channels about 1 hour 20 min; these figures are for winter 1992/93. (Table 3.9.)

The factor that best explains radio listening is age. Older age groups spend more time with the radio than younger people. (Table 3.10.)

Commercial radio stations have suffered from declining advertising revenue just as badly other media. Since 1991 the turnover figures of private radio stations have been down on the figures for the previous years. On the other hand, with the increasing number of bankruptcies and closedowns there have been less radio stations around to fight for the smaller advertising cake. Around 90 per cent of revenue comes from advertising. (Figures 3.4 and 3.5.)

In the early 1990s staff numbers began to decline in local radio stations. In 1991, the total number of permanent staff was 520 (down from 630 in the previous year); staff working on a freelance basis numbered 550 (down from 800 in the previous year). Editorial staff have represented just under half of all permanent employees. (Table 3.4.) For details on the finances of YLE's radio operations and radio staff, see Tables 2.1. and 2.5 in Chapter 2.

Statistical sources

The figures describing the volume of national radio broadcasting are from YLE's annual reports and yearbooks.

The data on the volume, economy and finances of privately-owned local radio stations come from the Ministry of Communications (which requires regular reports on operations) and from the Association of Finnish Radio Broadcasters.

Commissioned by the Ministry of Communications, the Turku School of Economics Business Research Center has used questionnaire data to compile annual reports on the finances of local radio stations. The reports have been published since 1990.

YLE conducts diary studies a few times a year to study radio listening. In addition, a national radio survey is carried out by a joint commission from YLE, the Association of Finnish Radio Broadcasters and Radiobooking Oy to explore radio listening behaviour in areas where local radio stations compete with public-service broadcasting. In 1992/93, the sample for this diary study numbered around 12 000 people.

3.1 YLE weekly radio broadcasting hours 1980/81 – 1993

Year	Nationwide networks				Foreign service broad-casts	Regional broadcasts			Capital FM Helsinki*
	Channel 1	Channel 2	Channel 3	Channel 4		In Finnish	In Swedish	In Sami	
	Hours/week								
1980/81	121	109	–	99	40	52	17	2	
1981/82	135	130	–	131	163	56	18	2	
1982/83	135	130	–	130	179	75	19	2	
1983/84	135	130	–	130	168	84	24	2	
1984/85	133	137	–	131	187	109	26	3	
1985/86	130	136	–	130	187	142	42	3	
1986/87	129	135	–	129	187	176	50	4	
1987/88	130	165	–	124	222	210	58	6	
1988/89	124	151	–	121	235	354	57	10	
1989/90	133	168	–	127	232	547	58	10	
1990/91	132	168	130	128	229	549	76	11	
1991/92	134	168	137	131	219	497	137	16	155
1993	134	168	136	130	248	585	132	26	168

* Transmits the programming of Voice of America, National Public Radio, Deutsche Welle, Radio France International, CSband, BBC World Service and YLE's foreign service in the Helsinki area on a 24-hour basis. Broadcasting started in November 1991.

Source: YLE annual reports and yearbooks.

3.2 Average weekly broadcasting by private local radio stations 1985 – 1992*

	Hours/week
1985	30
1986	39
1987	62
1988	70
1989	94
1990	98
1991	107
1992	108

* Stations which started up in the middle of the year are not included in the statistics.

Source: Ministry of Communications, Local radio reviews.

Figure 3.2
Coverage areas of YLE radio channels

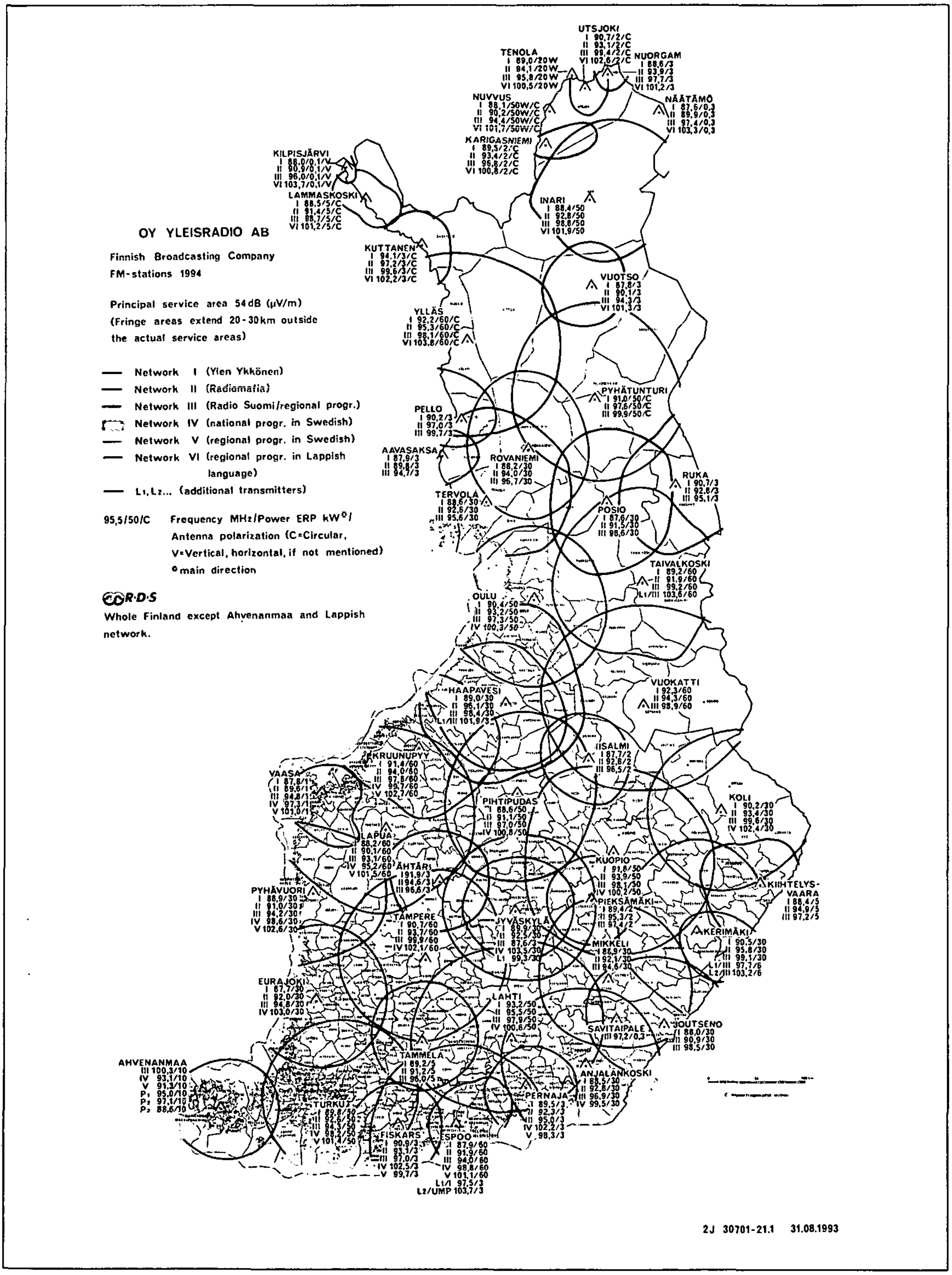
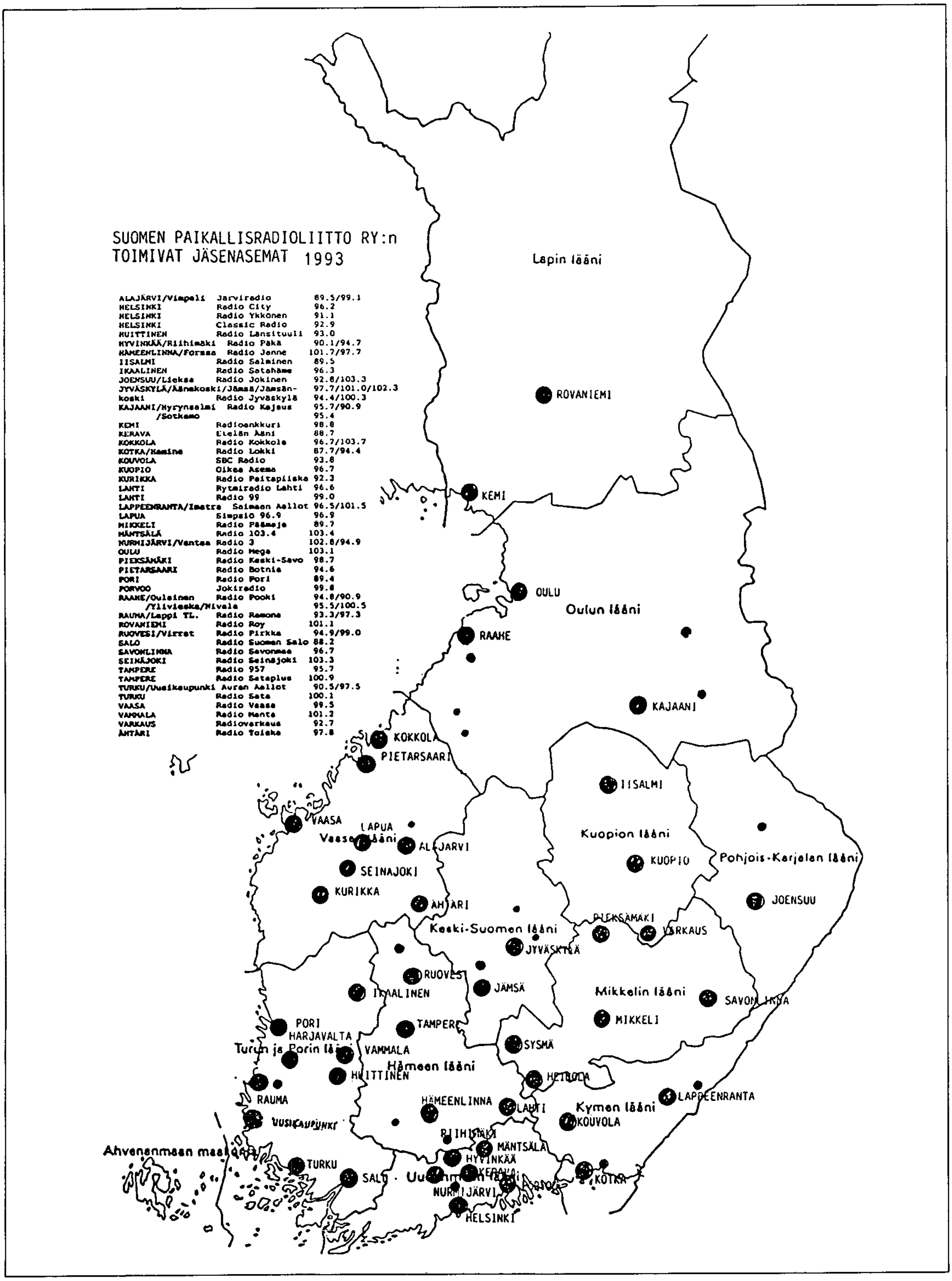


Figure 3.3
The Association of Finnish Radio Broadcasters: member stations in 1993



3.3 Number of local radio stations 1985 – 1993*

	Commercial	Non-commercial	Total	Stations closed down**
1985	18	–	18	0
1986	18	–	18	3
1987	26	2	28	0
1988	37	3	40	1
1989	50	5	55	2
1990	59	7	66	1
1991	53	7	60	6
1992	50	7	57	4
1993	50	6	56	4

* At year-end.
** Includes voluntary closedowns, bankruptcies and mergers.

Sources: Ministry of Communications; Association of Finnish Radio Broadcasters.

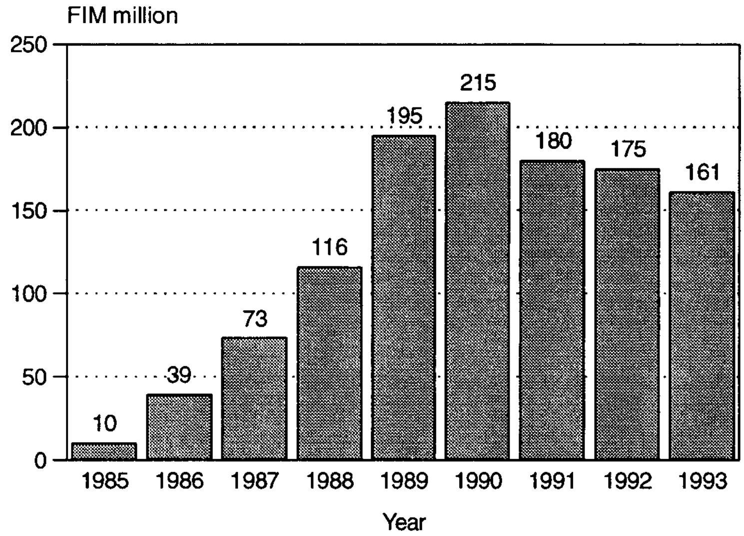
3.4 Local radio stations personnel 1985 – 1991*

	1985	1986	1987	1988	1989	1990	1991
	Employees						
Programming staff	50 %	46 %	..	42 %	46 %	46 %	..
Finance and administration	15 %	15 %	..	22 %	21 %	25 %	..
Marketing	24 %	28 %	..	28 %	25 %	21 %	..
Engineering	11 %	11 %	..	8 %	8 %	8 %	..
	100 %	100 %	..	100 %	100 %	100 %	..
Permanent staff total	155	168	..	400	583	630	521
Free lance	..	190	..	418	722	800	550
Permanent staff average/station	9	10	..	10	12	11	10

* Personnel working for all active stations during 1985-1988; from 1989 onwards personnel of commercial local radio stations.

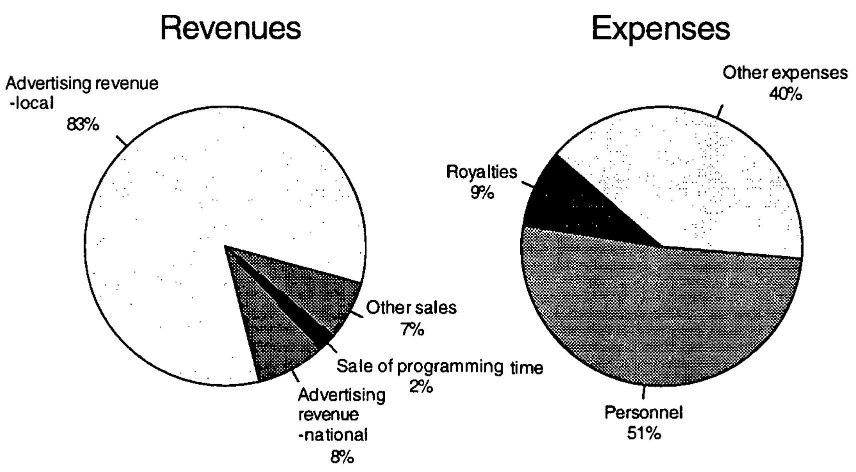
Source: Ministry of Communications, Local radio survey I and II; Association of Finnish Radio Broadcasters.

Figure 3.4
Turnover of private local radio stations 1985 – 1993



Sources: Ministry of Communications, Local radio surveys;
Association of Finnish Radio Broadcasters.

Figure 3.5
Breakdown of local radio stations' revenues and expenses 1992



Source: Paikallisradioiden taloustilasto 1992

3.5 YLE regional and local broadcasting 1993

	In Finnish	In Swedish	In Sami
	Hours/week		
Uusimaa	43	65	–
Western Finland	60	21	–
Häme	94	–	–
Southeastern Finland	81	–	–
Eastern Finland	53	–	–
Central Finland	90	–	–
Ostrobothnia	55	27	–
Oulu province	60	–	–
Lapland	46	–	–
Sami programming area	–	–	26
Åland		23	–
Total	585	132	26

Source: YLE yearbook 1993.

3.6 YLE regional programme centres

Location	Name	Est.
Helsinki	Radio Mellannyland	1976
Helsinki	Ylen Aikainen	1975
Hämeenlinna	Kanta-Hämeen Radio	1989
Inari	Sa'mi Radio	1987
Joensuu	Pohjois-Karjalan Radio	1988
Jyväskylä	Radio Keski-Suomi	1986
Kajaani	Kainuun Radio	1988
Kemi	Radio Perämeri	1991
Kokkola	Radio Keski-Pohjanmaa	1991
Kouvola	Kymenlaakson Radio	1989
Kuopio	Pohjois-Savon Radio	1984
Lahti	Lahden Radio	1984
Lappeenranta	Etelä-Karjalan Radio	1989
Mikkeli	Etelä-Savon Radio	1985
Oulu	Oulu Radio	1983
Pori	Satakunnan Radio	1988
Porvoo	Radio Östnyland	1973
Porvoo	Radio Itä-Uusimaa	1991
Rovaniemi	Lapin Radio	1988
Tammisaari	Radio Västnyland	1973
Tammisaari	Radio Länsi-Uusimaa	1991
Tampere	Tampereen Radio	1982
Turku	Radio Åboland	1973
Turku	Turun Radio	1982
Vaasa	Radio Österbotten	1973
Vaasa	Radio Etelä-Pohjanmaa	1988
Maarianhamina	Radio Åland	1973

Source: YLE.

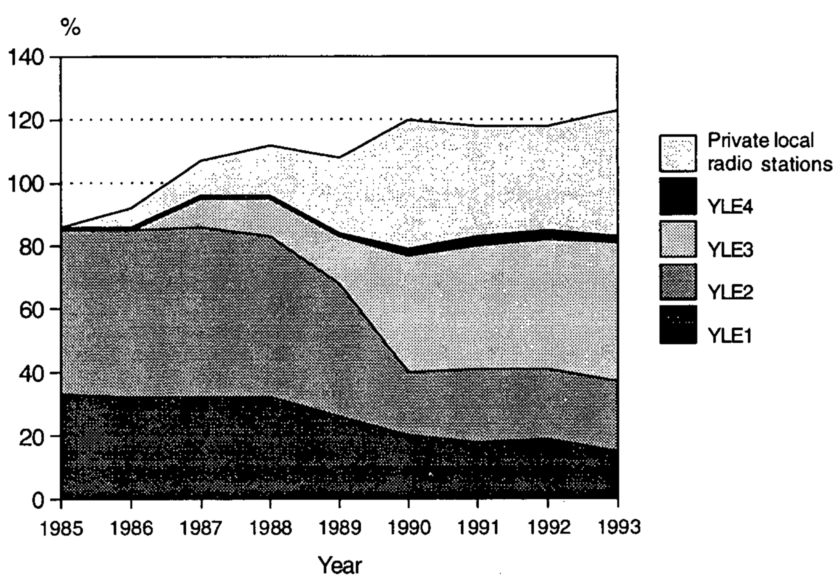
3.7 Daily reach of radio 1980 – 1993*

	1980	1985	1986	1987	1988	1989	1990	1991		1992		1993
								Whole country	Local radio areas	Whole country	Local radio areas	Whole country
	%											
YLE1**	52	33	32	32	32	26	20	18	16	19	14	15
YLE2***	55	52	53	54	51	42	20	23	21	22	21	22
YLE3****	..	..	..	9	12	15	37	39	43	41	37	44
YLE4*****	1	1	1	1	1	1	2	3	2	3	3	2
YLE total	76	68	66	66	65	58	63	68	65	68	..	67
Private local radio stations	–	..	6	11	16	24	41	35	45	33	44	40
All total	76	..	67	70	71	67	83	82	..	83	..	85

* Data for late autumn, 1986 data for March. Data on local radio areas for year-end 1991 and 1992.
** As from June 1990 Yle Radio 1.
*** As from June 1990 Radiomafia.
**** As from June 1990 Radio Suomi.
***** Full-service network for the Swedish-speaking audience.

Sources: YLE, Research and Development; Association of Finnish Radio Broadcasters.

Figure 3.6
Daily reach of radio stations (% of population) 1985 – 1993



Source: Table 3.7

3.8 Daily reach of radio by population groups in autumn 1992

	Yle Radio 1	Radio mafia	Radio Finland	Swedish	YLE total	Private local radio	All total
	%						
All	19	22	41	3	68	33	83
Sex							
Women	22	17	40	3	68	30	82
Men	16	26	43	3	69	37	83
Age							
9 – 14 years	13	22	17	4	39	25	54
15 – 24 years	4	43	12	1	53	37	74
25 – 34 years	8	35	29	2	59	44	83
35 – 44 years	16	20	41	2	67	42	84
45 – 54 years	23	12	60	5	83	32	92
55 – 64 years	29	5	62	4	81	30	89
65 – years	41	9	64	4	90	17	94
Education							
Primary school	29	11	54	3	78	26	86
Comprehensive	14	27	36	3	63	36	81
College/Academic	17	25	35	5	65	37	82
Occupation							
Industrial blue-collar	13	30	39	1	69	40	86
White-collar	16	22	39	5	66	40	84
Managerial	32	21	36	10	70	30	80
Farmer/Other self-employed	17	18	56	3	79	39	93
Housewife	18	16	41	2	65	37	84
Pensioner	36	8	65	4	87	22	92
Schoolboy/girl	10	31	14	3	45	28	61
Student	6	31	11	1	44	40	70
Place of residence							
Helsinki area	20	19	35	6	63	33	79
Major towns	14	18	37	4	61	46	83
Other towns	18	21	41	2	67	31	81
Other municipalities	21	24	45	3	73	31	85

Sources: YLE, Research and Development, radio listening survey in November 1992.

3.9 Average daily radio listening time 1980 – 1993*

	1980	1985	1986	1987	1988	1989	1990	1991		1992		1993
								Whole country	Local radio areas	Whole country	Local radio areas	Whole country
	Min/day											
YLE1**	64	29	35	34	34	29	23	23	19	27	17	19
YLE2***	64	83	96	114	97	78	24	31	29	31	28	29
YLE3****	..	6	6	9	13	23	80	87	96	105	84	102
YLE4*****	1	1	1	1	1	1	2	3	2	4	3	3
YLE total	128	119	138	158	146	131	129	144	145	167	132	152
Private local radio stations	–	..	6	16	26	44	69	62	86	62	81	71
All total	128	..	145	174	172	175	199	206	232	230	214	223

* Data for late autumn, 1986 data for March. Data on local radio areas for year-end 1991 and 1992.
** As from June 1990 Yle Radio 1.
*** As from June 1990 Radiomafia.
**** As from June 1990 Radio Suomi.
***** Full-service network for the Swedish-speaking audience.

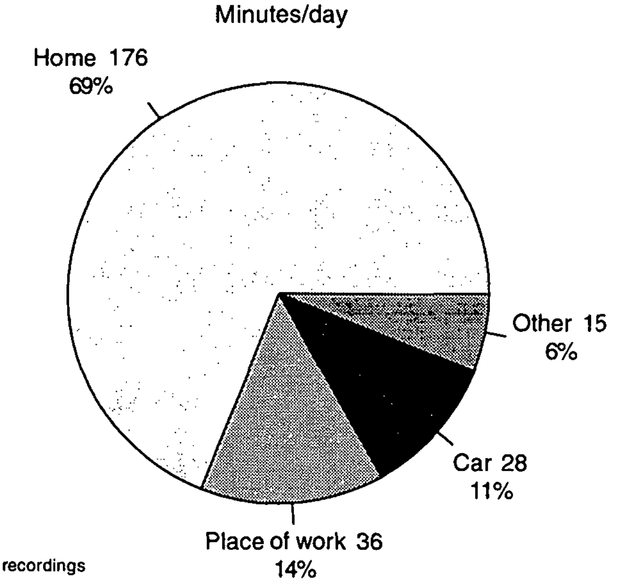
Sources: YLE, Research and Development; Association of Finnish Radio Broadcasters.

3.10 Average daily radio listening time by population groups in autumn 1992

	Yle Radio 1	Radio mafia	Radio Finland	Swedish	YLE total	Private local radio	All total
	Min/day						
All	27	31	105	4	167	62	230
Sex							
Women	35	26	105	4	170	61	231
Men	19	37	105	4	164	64	228
Age							
9 – 14 years	9	16	16	2	44	21	65
15 – 24 years	4	53	18	0	76	49	124
25 – 34 years	7	60	50	2	120	88	208
35 – 44 years	17	33	92	3	144	97	241
45 – 54 years	37	23	174	7	241	54	295
55 – 64 years	44	7	164	5	220	60	280
65 – years	75	11	211	8	305	36	341
Occupation							
Industrial blue-collar	17	61	92	3	173	84	256
White-collar	20	36	83	6	144	76	220
Managerial	42	34	54	8	138	39	177
Farmer/Other self-employed	26	23	154	5	208	84	292
Housewife	20	36	92	0	148	70	218
Pensioner	61	10	200	6	276	49	325
Schoolboy/girl	7	28	14	2	50	28	79
Student	6	29	13	0	48	58	106
Education							
Primary	47	16	161	5	227	51	278
Secondary	16	42	84	3	144	70	213
College/Academic	25	31	74	6	136	63	200
Place of residence							
Helsinki area	34	24	80	7	145	61	206
Major towns	21	31	83	4	140	83	222
Other towns	27	26	109	3	165	60	225
Other municipalities	27	37	117	4	185	59	243

Sources: YLE, Research and Development, radio listening survey in November 1992.

Figure 3.7
Breakdown of radio listening by place of listening 1992*



*Includes listening to recordings

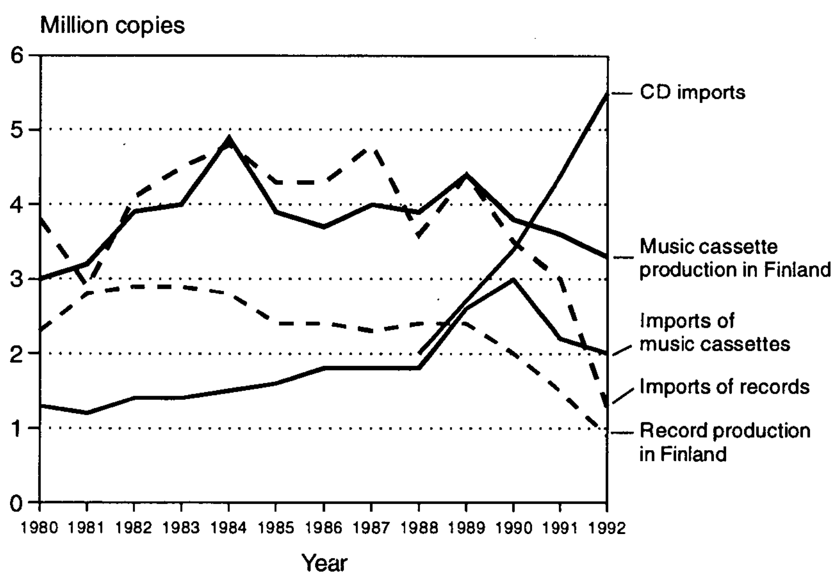
Source: YLE, Research and development, radio listening survey in November 1992.

4 Phonograms

Following a long period of steady growth, the Finnish phonogram markets took a downward turn in the early 1990s. During the 1980s annual sales of phonograms had increased from a total of 10 million to 16.5 million phonograms (an estimate based on adding imports to domestic production). In 1992, the corresponding figure was 13 million phonograms, or 3.5 million less than in the peak year of 1989. The import of blank cassettes has also been on the decline in recent years. (Table 4.1.)

During the latter half of the 1980s the increase in phonogram sales was chiefly attributable to the growing market share of CDs. In value terms the CD is the undisputed market leader at the moment, and even in terms of numbers sold it has gone ahead of the C-cassette, the previous market leader. (Tables 4.5 and 4.6.)

Figure 4.1
Production and imports of phonograms 1980 – 1992



Source: Table 4.1

Measured in numbers sold, the Finnish phonogram markets have long been rather evenly divided between domestic and foreign products. A clear indication of the powerful role and position of domestic phonograms is that on the top list of all-time long-play bestsellers, there are 16 Finnish as compared to only two foreign records that have sold over 100 000 copies.

In value terms, however, imported phonograms have consistently sold more than Finnish phonograms during the past few years. This is explained by the large proportion of CDs in the sale of foreign phonograms and by CDs being more expensive than other types of phonograms. (Tables 4.5 and 4.6.)

Vinyl is disappearing from the phonogram markets, and the C-cassette is also coming to the end of its long and successful road which started back in the mid-1960s. In early 1993, two rival systems were launched on the markets that were intended to replace the C-cassette. One is the Sony minidisc which is based on the same principles as the recording CD, and the other is Philips's dcc cassette player, which can also play back (but not record) C-cassettes.

However, the C-cassette still occupies an important place in the sale of domestic phonograms. Most phonograms by foreign artists, on the other hand, are sold on CD. (Table 4.5.)

In recent years a total of more than 3 000 recordings have been published in Finland every year. Cassettes account for by far the largest proportion of domestic titles. A considerable part of cassette production consists of other than music titles. In 1992, for example, 40 per cent of production was classified under this category, in which the biggest single subgroup consisted of spiritual material, followed by language cassettes. The total number of titles published each year is also pushed up by reproductions of old recordings and the publication of the same recording in several different formats. (Table 4.3.)

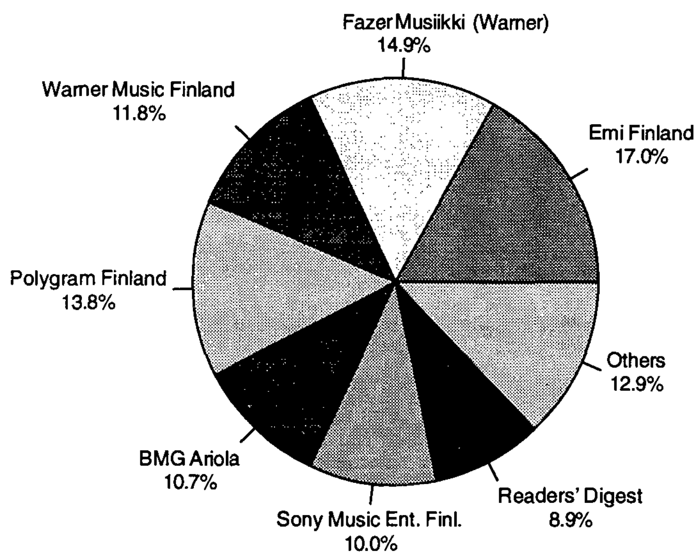
The process of vertical integration of the Finnish phonogram business was completed in the early 1990s: Warner started up in Finland in 1989, and BMG-Ariola set up a Finnish subsidiary in 1991. In the same year, Polygram took over Scandinavia's biggest record company Sonet complete with all its subsidiaries, and the following year founded its own subsidiary in Finland. The big multinational companies CBS (later taken over by Sony) and EMI started subsidiaries in Finland much earlier in the 1970s. In other words, all the multinational megapublishers in the record business now have a presence in Finland as well.

In autumn 1993 one of the most traditional companies in the business Fazer Musiikki was sold to Warner Music Finland. Fazer has an impressive back-list of music by Finnish artists as well as a comprehensive wholesale and distribution network.

The major record companies in Finland are very much in control of imports and domestic production. However, ever since the 1970s and 1980s there has been growing up a dense network of small independent publishers, and the number is apparently continuing to increase. According to FinStat's business register, there were a total of 129 record companies and recording studios in Finland in 1984. The figure for 1990 was 176.

Almost one quarter of the Finnish people listen on a daily basis to phonograms, whether purchased or borrowed. Calculated for the whole population, average listening time is about half an hour a day. Young people are particularly active in this respect: in the age group 15–24 years, over half listen to records or cassettes on a daily basis, and average listening time is almost 1.5 hours a day. (Table 4.8.) On top of this figure, of course, one still has to add the listening of music programmes on radio and television.

Figure 4.2
Market shares of phonogram sales in 1993



*Calculated on the basis of the wholesale value of sales by Finnish IFPI members.

Source: Finnish Group of IFPI.

Data on libraries' sound recording materials and the use of those materials are available from 1987 onwards. According to these figures the materials and the number of lendings have been increasing very quickly. In 1992, public libraries had a total of 1.2 million music recordings and 0.6 million other sound recordings. Lendings for music recordings in the same year totalled 4.2 million and for other recordings 2.1 million. Compared with all library lendings, however, these figures are still comparatively low. (Table 4.8; cf. Table 13 in Chapter 7).

Statistical sources

The main sources on the phonogram business are the Finnish Composers' Copyright Society (Teosto), the Finnish Group of IFPI, the National Board of Customs foreign trade statistics, and the Helsinki and Jyväskylä university libraries, which maintain lists of domestic recordings on the basis of the free copies they receive of all production.

On the basis of copyright legislation, Teosto is informed of all imports and domestic production of phonograms. Figures on imported recordings are also found in foreign trade statistics, which include data on the import of blank cassettes.

Statistics are also compiled on the annual sales of Finnish IFPI member organizations, providing numbers for both total value and number of copies sold. Using these statistics as well as data from Teosto and foreign trade statistics, the Finnish Group of IFPI also draws up annual estimates of total sales in the Finnish phonogram business. In recent years IFPI member producers have accounted for 60–70 per cent of the estimated total value of phonogram sales.

In foreign trade statistics as well as in the statistics published by Teosto, the term country of origin refers to the country where the recordings have been technically produced (i.e., duplicated). This means that in these two sources, all domestic CDs are entered as foreign recordings because the records have been pressed abroad. IFPI statistics use a different definition: here country of origin refers to the original country of production. Accordingly under the sale of CDs there are two categories, domestic and foreign recordings.

Further problems occur in defining the country of origin of foreign recordings (cf. Table 4.2). Again, country of origin refers to the place where the technical product has been made, not necessarily to the country where the recording has been produced and originally published. For instance, the reported country of origin for a large number of phonograms produced in the United States is some European country or Canada.

In connection with its diary studies of radio listening behaviour, the Finnish Broadcasting Company YLE has now also been doing studies to measure how much time people spend listening to recordings. FinStat's leisure study of 1991 includes detailed data on people's listening habits and on the ownership of phonograms.

Annual statistics published by the Ministry of Education on public libraries also include information on libraries' phonogram collections and lendings.

4.1 Import and production of phonograms and the import of blank audio cassettes 1980 – 1992

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
	Million copies												
Import													
Import of CDs*	–	–	–	–	–	–	–	–	2.0	2.7	3.4	4.4	5.5
Import of LPs & singles*	3.8	2.9	4.1	4.5	4.8	4.3	4.3	4.8	3.6	4.4	3.5	3.0	1.3
Import of MCs	1.3	1.2	1.4	1.4	1.5	1.6	1.8	1.8	1.8	2.6	3.0	2.2	2.0
Imports total	5.1	4.1	5.5	5.9	6.3	5.9	6.1	6.6	7.4	9.7	9.9	9.6	8.8
Production													
Production of LPs & singles in Finland	2.3	2.8	2.9	2.9	2.8	2.4	2.4	2.3	2.4	2.4	2.0	1.5	0.9
Production of MCs in Finland	3.0	3.2	3.9	4.0	4.9	3.9	3.7	4.0	3.9	4.4	3.8	3.6	3.3
Production total	5.3	6.0	6.8	6.9	7.7	6.3	6.1	6.3	6.3	6.8	5.8	5.1	4.2
Phonogram production and import total	10.4	10.1	12.3	12.8	14.0	12.2	12.2	12.9	13.7	16.5	15.7	14.7	13.0
Import of blank cassettes**	5.5	5.4	6.7	6.3	5.0	6.6	7.1	5.5	5.8	6.3	6.3	5.4	4.7

* Up until 1987 the import of CDs is included under the import of LPs.
NB: CDs by Finnish producers included in the import figures.
** Only C-cassettes.

Sources: Finnish Group of IFPI and Finnish Composers' Copyright Society.

4.2 Phonogram imports by country of origin 1980 – 1992 and value of imports in 1992*

Country	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992		Value of imports
	%												'000	%	FIM '000
LPs & singles															
Denmark	0.1	0.1	0.5	0.4	0.7	0.3	0.4	0.2	–	0.5	0.3	0.3	5	0.4	81
Norway	3.4	4.4	3.8	1.1	0.0	–	0.1	0.3	–	0.1	–	–	–	–	12
Sweden	10.9	11.6	13.2	8.0	7.7	6.1	7.5	6.1	8.3	7.8	4.7	2.6	68	5.4	952
Germany	10.9	17.6	13.1	10.9	14.4	21.9	26.7	26.0	24.0	32.4	34.4	49.4	445	35.6	7 750
Austria	–	–	–	–	–	–	0.4	0.2	–	–	0.4	0.3	2	0.2	38
Belgium	0.0	0.1	0.2	0.7	0.2	1.1	0.3	0.2	0.2	0.2	0.1	0.8	9	0.7	227
Spain	0.1	0.1	0.4	0.5	0.4	0.2	–	0.2	1.1	0.6	1.3	0.3	2	0.2	54
France	1.5	2.0	1.3	1.4	0.9	0.9	1.0	1.6	0.5	0.6	0.5	0.3	7	0.6	82
Greece	0.1	0.1	–	–	–	–	–	–	0.1	–	–	–	–	–	4
Ireland	0.1	0.1	–	–	–	–	–	–	–	–	–	–	–	–	5
Italy	0.4	0.4	3.7	4.9	1.3	1.8	1.1	1.6	2.6	1.1	1.3	0.3	2	0.2	35
Netherlands	10.2	23.4	22.0	25.5	22.4	26.9	28.5	24.3	26.3	26.4	21.9	25.1	425	34.0	3544
Portugal	0.1	0.1	–	0.1	–	–	–	0.1	0.2	–	0.4	0.1	1	0.1	10
Great Britain	15.4	22.6	23.3	36.9	48.0	35.7	24.2	19.4	21.5	19.4	23.9	15.2	145	11.6	3045
Switzerland	0.3	–	0.1	0.0	0.0	0.1	1.1	5.2	–	0.1	0.1	0.1	5	0.4	50
Hungary	–	0.2	–	0.1	0.1	–	0.1	–	0.2	–	0.0	–	–	–	–
Czechoslovakia	0.1	0.1	0.1	0.1	–	–	–	–	–	–	–	–	–	–	5
Soviet Union/Russia	0.4	0.3	–	0.1	0.1	0.1	0.1	0.3	0.1	–	–	0.5	–	–	–
USA	45.1	13.5	14.7	6.3	2.0	3.2	2.8	3.6	7.9	9.4	9.7	4.1	132	10.6	882
Canada	0.5	2.7	2.6	2.5	1.3	1.2	4.1	8.1	5.7	0.5	0.1	–	–	–	. 2
Brazil	0.2	0.1	–	–	–	0.1	–	–	–	–	–	–	–	–	–
Mexico	–	–	0.0	0.0	–	0.0	–	–	–	–	–	–	–	–	–
Japan	–	0.1	–	0.1	0.4	0.5	1.4	1.1	0.1	–	0.0	–	–	–	109
Philippines	–	0.1	0.8	0.1	–	–	–	–	–	–	–	–	–	–	–
Hong Kong	–	–	0.0	0.3	–	–	–	1.0	0.6	0.5	–	–	–	–	–
Republic of Korea	–	–	–	–	–	–	–	0.3	–	–	–	–	–	–	–
Australia	–	–	–	–	–	–	–	0.1	0.3	0.2	0.5	0.2	2	0.2	52
Others	0.2	0.3	0.2	0.0	0.1	0.1	0.2	0.1	0.0	0.2	0.3	0.2	1	0.1	11
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	1 251	100.0	16 950
'000 copies	3 800	2 900	4 100	4 500	4 800	4 300	4 300	4 800	3 600	4 400	3 500	3 000	1 251		

continued

4.2 continued

Country	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992		Value of imports
	%												'000	%	FIM '000
MCs															
Denmark	6.4	10.6	3.5	1.5	7.2	22.8	22.6	5.0	8.8	6.1	7.5	7.0	151	7.6	1 154
Norway	4.3	3.8	4.6	1.8	–	–	–	0.4	0.2	0.1	0.4	0.1	3	0.2	72
Sweden	21.3	17.4	12.6	15.4	13.5	11.4	9.8	9.6	10.5	13.9	7.8	5.4	117	5.9	1 998
Germany	8.7	10.1	13.2	12.3	14.6	19.2	16.2	18.0	12.8	13.7	19.2	23.9	534	26.8	7 756
Belgium	–	–	0.3	0.4	0.6	0.6	0.8	–	–	–	–	–	–	–	–
Spain	–	–	1.1	2.9	1.3	0.2	–	–	1.3	1.1	4.1	0.2	1	0.1	18
France	0.3	0.8	0.3	1.2	0.3	0.3	0.2	3.4	0.3	0.4	2.9	6.1	84	4.2	1 090
Italy	0.8	0.6	4.1	2.7	0.6	3.0	0.6	1.0	4.6	3.9	6.3	4.8	9	0.5	79
Netherlands	14.0	27.6	24.6	29.8	30.7	30.8	25.9	30.3	25.1	34.0	23.3	30.5	634	31.8	4 146
Great Britain	14.9	18.2	19.2	9.5	19.5	5.7	11.4	18.1	25.3	17.4	16.2	11.7	200	10.0	2 442
Switzerland	5.8	6.4	4.9	10.4	9.2	3.5	7.9	5.3	2.5	0.9	0.8	0.8	12	0.6	97
USA	22.0	3.9	9.3	4.2	1.2	0.9	2.9	0.4	1.6	2.6	3.4	3.0	44	2.2	1 189
Mexico	–	–	–	0.1	–	–	–	–	–	–	–	–	–	–	–
Japan	–	0.1	0.2	1.8	1.1	1.6	1.2	1.3	0.2	0.2	0.5	–	–	–	8
Hong Kong	–	–	1.9	5.9	–	–	–	–	1.9	1.5	2.6	0.5	8	0.4	115
Singapore	0.7	–	–	–	–	–	–	–	0.0	–	–	–	14	0.7	273
Canada	–	–	–	–	–	–	0.2	3.9	2.1	0.2	–	0.2	1	0.1	22
Portugal	–	–	–	–	–	–	–	1.7	1.9	3.4	3.3	2.5	66	3.3	470
Soviet Union/Russia	–	–	–	–	–	–	–	0.1	–	–	–	–	–	–	–
Austria	–	–	–	–	–	–	–	1.0	0.4	–	0.6	0.3	1	0.1	26
Australia	–	–	–	–	–	–	–	–	0.4	–	0.5	–	–	–	–
Others	0.8	0.5	0.2	0.1	0.2	0.1	0.3	0.4	0.1	0.6	0.6	2.9	116	5.8	1 474
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	1 995	100.0	22 429
'000 copies	1 400	1 200	1 400	1 400	1 500	1 600	1 800	1 800	1 800	2 600	3 000	2 200	1 995		

continued

4.2 continued

Country	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992		Value of imports
	%												'000	%	FIM '000
CDs**															
Austria									9.4	10.9	8.8	12.7	1030	18.6	15 294
Belgium									0.6	0.3	0.6	0.2	20	0.4	401
Switzerland									9.1	8.2	5.2	2.7	2	0.0	79
Germany									24.0	23.9	26.4	28.1	1418	25.6	37 140
Denmark									5.9	12.0	9.8	11.9	446	8.1	3 817
Spain									0.1	0.3	0.1	0.1	2	0.0	75
France									1.6	2.1	0.6	0.7	49	0.9	1 459
Great Britain									18.8	15.1	17.4	14.9	675	12.2	14 774
Italy									0.7	0.5	0.3	0.1	4	0.1	135
Netherlands									11.6	13.3	11.8	12.6	751	13.6	11 470
Norway									4.9	0.0	0.1	0.1	50	0.9	583
Portugal									0.5	0.9	0.9	0.8	66	1.2	1 006
Sweden									5.2	5.7	9.3	9.3	772	13.9	8 643
Japan									0.7	0.3	0.3	0.3	5	0.1	359
Republic of Korea									3.3	0.9	–	–	–	–	–
Canada									0.6	0.5	0.0	–	–	–	22
USA									2.6	4.7	5.7	5.0	242	4.4	12 572
Australia									0.2	0.0	0.1	0.2	2	0.0	86
Others									0.0	0.3	2.6	0.2	6	0.1	306
Total									100.0	100.0	100.0	100.0	5 540	100.0	108 221
'000 copies									2 000	2 700	3 400	4 400	5 540		

* Country of origin refers to the country where the product has been pressed, which in many cases is not the same as the original country of production.

** Up until 1987 statistics on CDs were included in the figures for LP records.

Source: SVT1A: Foreign trade, National Board of Customs.

4.3 Production of phonogram titles in Finland 1983 – 1992

Year	Singles*		LPs		MCs**		CDs		Audio books		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1983	377	21.1	511	28.6	896	50.2	–	–	–	–	1 784	100.0
1984	392	22.3	510	29.0	837	47.7	–	–	17	1.0	1 756	100.0
1985	380	20.3	489	26.1	981	52.4	–	–	22	1.2	1 872	100.0
1986	390	18.3	571	26.8	1 123	52.7	9	0.4	36	1.7	2 129	100.0
1987	405	20.8	516	26.5	924	47.5	23	1.2	78	4.0	1 946	100.0
1988	406	21.6	457	24.3	706	37.5	123	6.5	190	10.1	1 882	100.0
1989	579	24.6	502	21.3	922	39.2	279	11.9	70	3.0	2 352	100.0
1990	710	23.7	514	17.2	1 349	45.1	281	9.4	140	4.7	2 994	100.0
1991	782	25.4	521	16.9	1 400	45.5	240	7.8	136	4.4	3 079	100.0
1992	801	23.1	377	10.9	1 651	47.5	501	14.4	143	4.1	3 473	100.0

* EP records are slotted in different classes by size: single-size EPs under singles, LP-size EPs under LPs. Maxi singles are classified under LPs

** Includes much more than just music cassettes: in 1992, for instance, the share of other recordings was 41 %.

Source: University libraries of Jyväskylä and Helsinki.

4.4 Production of phonograms in Finland 1981 – 1992*

	Production of phonograms											
	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
	'000 copies											
All producers												
Singles	..	..	..	82	146	263	233	275	374	406	329	259
EPs	..	..	..	4	13	12	10	20	23	29	19	22
LPs	..	..	..	2 713	2 244	2 130	2 083	2 146	2 037	1 573	1 208	593
MCs	..	..	..	4 923	3 891	3 655	4 007	3 851	4 365	3 817	3 575	3 304
Total	5 985	6 790	6 746	7 722	6 294	6 060	6 333	6 292	6 799	5 825	5 130	4 178
Finnish Group of IFPI												
Singles	..	..	..	36	77	167	111	132	126	168	190	139
EPs	..	..	..	–	5	–	–	7	8	10	6	1
LPs	..	..	..	1 604	1 503	1 350	1 403	1 396	1 167	935	970	491
MCs	..	..	..	2 582	2 474	1 959	2 015	1 756	1 854	1 776	2 213	1 929
Total	3 378	3 345	3 762	4 222	4 059	3 476	3 529	3 291	3 155	2 889	3 379	2 559
Other "standard producers"**												
Singles	..	..	..	3	39	59	66	56	70	67	7	5
EPs	..	..	..	–	–	–	–	–	–	–	–	–
LPs	..	..	..	725	496	568	496	502	564	415	113	43
MCs	..	..	..	900	601	762	748	664	958	877	370	311
Total	1 635	1 986	1 772	1 628	1 136	1 389	1 310	1 222	1 592	1 359	490	360
One-time licence producers***												
Singles	71	81	35	43	30	37	56	87	178	171	132	114
EPs	3	9	8	4	8	12	10	13	15	19	13	21
LPs	156	138	198	384	245	212	184	248	306	223	124	59
MCs	742	1 232	972	1 441	816	934	1 244	1 431	1 553	1 164	992	1 065
Total	972	1 459	1 212	1 872	1 099	1 195	1 494	1 779	2 052	1 577	1 261	1 259

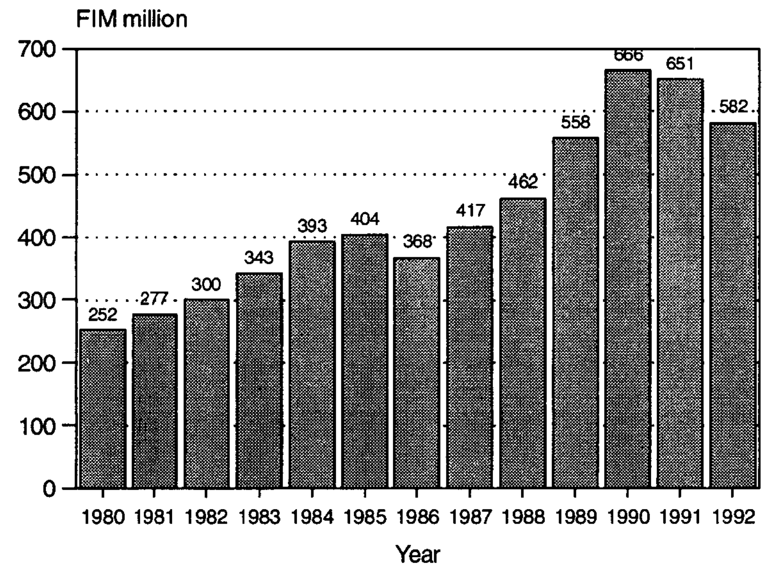
* NB: Finnish producers have their CDs manufactured abroad; therefore these are not included under figures on domestic productior

** Producers as well as the Finnish Group of IFPI have a standard contract with the Nordisk Copyright Bureau (NCB) concerning the collection of music royalties.

*** A one-time licence to record music; in 1990 a total of about 1 000 one-time licences were granted.

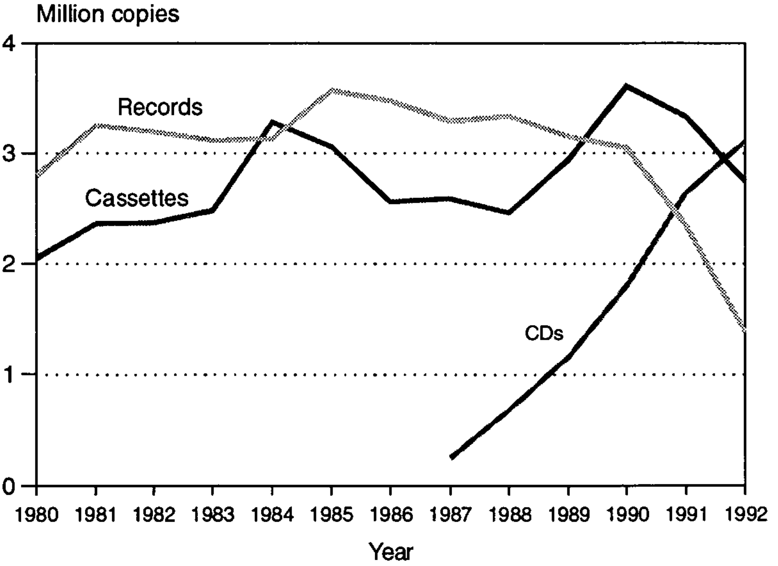
Sources: Finnish Composers' Copyright Society and Finnish Group of IFPI.

Figure 4.3
Phonogram markets 1980 – 1992



Source: Finnish Group of IFPI.

Figure 4.4
Phonogram sales by type of recording 1980 – 1992



Source: Table 4.5

4.5 Breakdown of phonogram sales by type of recording 1980 – 1992*

Year	LPs & singles			MCs			CDs			All phonograms total	Finnish	Foreign	All phonograms total
	Finnish	Foreign	Total	Finnish	Foreign	Total	Finnish	Foreign	Total				
	'000 copies												
1980	1 158	1 647	2 805	1 424	627	2 051	–	–	–	4 856	2 582	2 274	4 856
1981	1 485	1 769	3 254	1 672	692	2 364	–	–	–	5 618	3 157	2 461	5 618
1982	1 472	1 724	3 196	1 812	558	2 370	–	–	–	5 566	3 284	2 282	5 566
1983	1 223	1 898	3 121	1 827	659	2 486	–	–	–	5 607	3 050	2 557	5 607
1984	1 328	1 807	3 135	2 641	644	3 285	–	–	–	6 420	3 969	2 451	6 420
1985	1 430	2 144	3 574	2 365	694	3 059	–	–	–	6 633	3 795	2 838	6 633
1986	1 177	2 300	3 477	1 764	799	2 563	–	–	–	6 040	2 941	3 099	6 040
1987	1 220	2 072	3 292	1 767	822	2 589	34	215	249	6 130	3 021	3 102	6 130
1988	1 333	2 002	3 335	1 631	832	2 463	125	555	680	6 478	3 089	3 389	6 478
1989	1 066	2 090	3 156	1 825	1 113	2 938	248	901	1 149	7 243	3 139	4 104	7 243
1990	1 206	1 846	3 052	2 267	1 341	3 608	525	1 273	1 798	8 458	3 998	4 460	8 458
1991	1 001	1 351	2 352	2 046	1 285	3 331	796	1 842	2 638	8 321	3 843	4 478	8 321
1992	718	660	1 378	1 859	882	2 742	1 032	2 079	3 111	7 230	3 610	3 621	7 230
	%												
1980	23.9	33.9		29.3	12.9		–	–		100.0	53.2	46.8	100.0
1981	26.4	31.5		29.8	12.3		–	–		100.0	56.2	43.8	100.0
1982	26.5	30.9		32.6	10.3		–	–		100.0	59.0	41.0	100.0
1983	21.8	33.9		32.6	11.8		–	–		100.0	54.4	45.6	100.0
1984	20.7	28.2		41.1	10.0		–	–		100.0	61.8	38.2	100.0
1985	21.6	32.3		35.7	10.5		–	–		100.0	57.2	42.8	100.0
1986	19.5	38.1		29.2	13.2		–	–		100.0	48.7	51.3	100.0
1987	19.9	33.8		28.8	13.4		0.6	3.5		100.0	49.3	50.6	100.0
1988	20.6	30.9		25.2	12.8		1.9	8.6		100.0	47.7	52.3	100.0
1989	14.7	28.9		25.2	15.4		3.4	12.4		100.0	43.3	56.7	100.0
1990	14.3	21.8		26.8	15.9		6.2	15.1		100.0	47.3	52.7	100.0
1991	12.0	16.2		24.6	15.4		9.6	22.1		100.0	46.2	53.8	100.0
1992	9.9	9.1		25.7	12.2		14.3	28.8		100.0	49.9	50.1	100.0

* Data cover the sales of Finnish Group of IFPI members only.

Source: Finnish Group of IFPI.

4.6 Value of phonogram sales by type of recording 1988 – 1992*

Year	LPs & singles Finnish	LPs & singles Foreign	LPs & singles Total	MCs Finnish	MCs Foreign	MCs Total	CDs Finnish	CDs Foreign	CDs Total	All phonograms total	Finnish	Foreign	All phonograms total
	FIM million												
1988	38.6	60.5	99.2	46.7	28.3	75.1	6.6	30.3	36.5	210.8	91.9	118.8	210.8
1989	32.4	64.5	96.9	49.8	36.4	86.2	12.2	46.7	58.9	242.0	94.4	147.6	242.0
1990	31.0	48.5	79.5	54.3	36.4	90.7	21.9	59.4	81.2	251.5	107.2	144.3	251.5
1991	25.7	34.6	60.4	53.9	35.2	89.1	33.8	83.0	116.8	266.2	113.5	152.7	266.2
1992	19.4	17.3	36.7	54.3	30.5	84.8	46.2	97.7	143.9	265.3	119.9	145.5	265.3
	%												
1988	18.3	28.7		22.2	13.4		3.1	14.2		100.0	43.6	53.4	100.0
1989	13.4	26.7		20.6	15.0		5.0	19.3		100.0	39.0	61.0	100.0
1990	12.3	19.3		21.6	14.5		8.7	23.6		100.0	42.6	57.4	100.0
1991	9.7	13.0		20.2	13.2		12.7	31.2		100.0	42.6	57.4	100.0
1992	7.3	6.5		20.5	11.5		17.4	36.8		100.0	45.2	54.8	100.0

* Wholesale value of sales by Finnish IFPI members only.

Source: Finnish Group of IFPI.

4.7 Public library phonogram collections, number of times played and number of lendings 1985 – 1992

	Recordings: Music recordings	Recordings: Other audio recordings	Number of times played in library	Lendings: Music	Lendings: Language courses	Lendings: Audio books
	'000					
1985	..	..	915	..	..	47
1986	..	..	861	..	..	99
1987	752	327	845	1 835	289	887
1988	843	388	726	2 153	286	1 069
1989	949	446	688	2 576	290	1 352
1990	1 075	509	631	2 972	332	1 475
1991	1 179	544	611	3 635	329	1 653
1992	1 214	623	550	4 177	377	1 770

Source: National Board of General Education, Ministry of Education.

4.8 Daily listening to phonograms 1990 – 1992

	Average daily reach			Average time spent listening		
	1990	1991	1992	1990	1991	1992
	%			Min		
All	24	24	23	23	28	28
Sex						
Women	24	23	24	24	27	27
Men	23	26	23	23	28	28
Age						
9 – 14 years	44	52	39	35	63	39
15 – 24 years	58	54	57	70	72	81
25 – 34 years	29	30	27	26	32	24
35 – 44 years	13	18	17	10	16	22
45 – 64 years	7	11	12	6	10	13
65 – 74 years	2	3	4	2	3	4
Education						
Primary	7	13	13	5	12	11
Secondary	28	35	29	31	44	37
College/Academic	31	37	26	29	29	30
Occupation						
Industrial blue-collar			21			26
White-collar			22			24
Managerial			16			17
Farmer/Other self-employed			14			17
Housewife			27			25
Pensioner			7			8
Schoolboy/girl			47			51
Student			56			78

* The data are based on the national radio listening studies conducted by YLE Research and Development, involving some 1 100–1 200 Finns aged 9 and over.

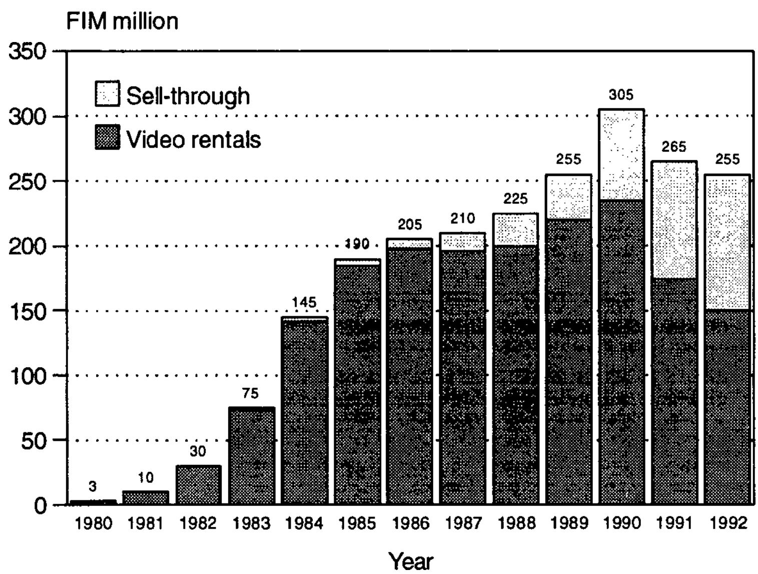
Source: YLE Research and Development.

5 Video

Video rentals were very much the mainstay of the video business in Finland up until the late 1980s. Following a period of rapid expansion, the rental markets were soon saturated. During 1982-84, the turnover of the video rental business increased almost fivefold from FIM 30 to FIM 145 million, and in 1985 it went ahead of the cinema business. The growth of the rental markets was quite phenomenal, but so too was the decline that followed. In 1991, the markets collapsed. The same thing has earlier happened e.g. in Sweden and in the former Federal Republic of Germany. In Finland, the turnover of the video rentals market dropped by one quarter in 1991. The decline since then has been somewhat slower.

It seems unlikely that the economic recession can alone explain the decline of video rentals; instead it seems that these developments are due to a clear change in consumer behavior. This theory is supported by the fact that sell-through (which in the absence of any real supply was virtually non-existent during the early part of the 1980s) began to expand very quickly towards the end of the 1980s. It has continued to increase even since the onset of recession. In 1992, sell-through videos accounted for 40 per cent of the video markets. (Figure 5.1 and Table 5.3.)

Figure 5.1
Video distribution turnover 1980 – 1992



Source: Table 5.3

The decline of the video rentals market is clearly reflected in the declining number of video shops. During the early enthusiasm a large number of small shops specializing in video rentals grew up all over the country. Now, they have all but disappeared, and even the major chains have had to close down some of their outlets. On the other hand, the number of outlets for sell-through videos has been rapidly increasing.

According to estimates published by Finnish IFPI members, businesses specializing in the rental and sell-through of videos had less than 100 outlets across the country in 1991. The biggest chain is Kotikatsomo (owned by Rautakirja Group) with 20 outlets in 1993 (down from 34 outlets still in 1992).

The same source estimates the number of video rental outlets at around 1 100. Most of these were in kiosks and petrol stations. The number has been decreasing very sharply. It is estimated that the number of sell-through outlets has by now exceeded the number of rental shops: the figure is currently 1 500 and increasing rapidly. (Table 5.6.)

Whereas most rental videos are feature films, sell-through videos offer a much wider range of material to choose from, including videos related to leisure activities, keep-fit videos, children's programmes, music videos, etc.

Over the past few years the number of businesses engaged in the import of video recordings has varied between 30 and 40. Most of these are small companies which represent a marginal part of total turnover in the business. The business is very much dominated by the four or five biggest importers which have distribution contracts with major American film companies.

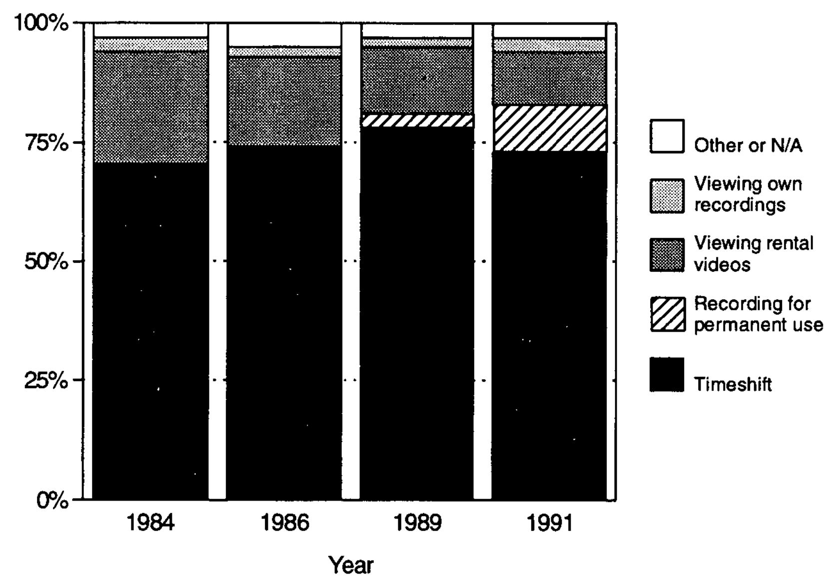
In the wholesale business, the undisputed market leader is Europa Vision, which belongs to the Rautakirja Group. In 1992, the company controlled around 40 per cent of the video recording markets. The three next biggest companies, with market shares of over 10 per cent each, were Warner, Finnkino and CIC. That the whole video business remains very much in a state of ferment is clearly indicated by the fact that the second and third biggest distributors in 1991, Fazer Musiikki and Esselte Video, have decided to close down operations in the sector for reasons of profitability. Fazer was the chief representative of Warner's video production, while Esselte distributed CIC videos. Warner and CIC now have their own agencies in Finland. (Figure 5.4.)

During 1984-1991, the total number of video titles available in Finland came close to 10 000. During the past few years American videos have accounted for roughly half of all titles on the market; the second largest category of foreign-produced videos were from Britain, accounting for about 15 per cent of the market. Recently the number of domestic video titles has been rapidly increasing. In 1992, Finnish video titles accounted for one quarter of those on the market. (Table 5.4.)

The viewing of videos (whether rental or sell-through) represents a relatively minor part of VCR use in Finland. According to all three video studies (from 1984, 1986 and 1989) commissioned by the Ministry of Education as well as FinStat's 1991 leisure study, over 70 per cent the households that have a VCR use it mainly for purposes of recording programmes from television. The figure has steadily increased every time by a few percentage points. (Figure 5.2 and Table 5.8.) In time-shift use, the top two categories are feature films and series/serials.

It seems quite obvious that the early peak in video rentals is explained by the initial enthusiasm when the number of VCRs in Finnish households increased very rapidly. However, the commonest use of VCRs today is for timeshift purposes, i.e. recording and viewing programmes at a time that best suits oneself or the whole family.

Figure 5.2
Primary uses of VCRs 1984 – 1991



Source: Table 5.8

That timeshift occupies such an important place in VCR use is clearly evident in the relative proportion of the production and import of video recordings and the import of blank video cassettes. In 1992, for example, a total of around 1.1 million video recordings were produced/duplicated in or imported to Finland, whereas the number of imported blank cassettes numbered around 5.3 million. (Table 5.1.)

YLE's television viewing surveys, which are based on continuous monitoring, also provide data on video viewing. According to these data, the daily reach of videos in 1993 averaged 17 per cent of the population who had access to a VCR. In the video population, average daily viewing time was 14 minutes (this figure is calculated for all people who have access to video; the average viewing time is obviously considerably higher amongst the people who use their VCR for viewing on any particular day). (Table 5.7.)

In recent years the number of video recordings available in libraries has increased very rapidly, but even so it is still relatively low in comparison with the number of sound recordings. In 1992, videos accounted for less than 10 per cent of libraries' audiovisual material. The total number of video titles was 107 000; lendings amounted to around 2.5 million. (Table 5.9.)

Statistical sources

Statistics on the production and duplication of video recordings in Finland are compiled by the Finnish Composers' Copyright Society (Teosto). These statistics cover all duplication companies with which NBC Finland/Teosto have a duplication contract. The figures reported by Teosto include the duplication of foreign videos in Finland, which account for a large proportion of the total.

Statistics on the imports of video recordings as well as blank videos by country of origin are maintained by the National Board of Customs. Country of origin refers to the country where the recording has been technically produced (i.e., duplicated); in many cases this is not the same as the original country of production.

Statistics on the annual sales of video recordings are compiled by the Finnish Group of IFPI, providing figures for both total value and for the distribution between rental and sell-through videos.

The library statistics published by the Cultural Department of the Ministry of Education also contain data on video recordings available and number of lendings.

A major source on the spread of VCRs and the development of viewing behaviour is represented by the video surveys commissioned by the Ministry of Education in 1984, 1986 and 1989. The leisure survey carried out by Statistics Finland in 1991 contains more recent data on VCR use; these are comparable with the results of the video studies by the Ministry of Education.

The summary reports of metered television audience studies commissioned by YLE, MTV3 and the Finnish Association of Advertising Agencies also include data on VCR use.

5.1 Import and production/duplication of video recordings and the import of blank video cassettes 1982 – 1992

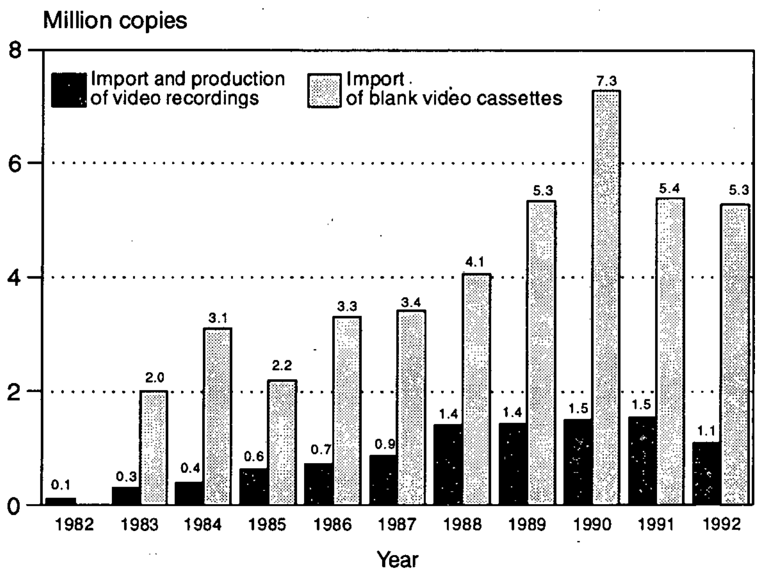
	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992
	'000 copies										
Import of video recordings	116	310	350	390	345	390	415	775	944	1 143	826
Production/duplication of video recordings in Finland*	–	–	51	239	379	468	992	654	552	398	267
Imports and production total	116	310	401	619	724	858	1 407	1 429	1 496	1 541	1 093
Import of blank video cassettes**	..	2 000	3 100	2 200	3 300	3 400	4 056	5 335	7 302	5 393	5 287

* Data on production/duplication in Finland are not fully exhaustive. The statistics only cover those duplication companies with which NBC Finland/Teosto have a production/duplication contract.

** Does not include 8 mm video camera tapes (296 000 tapes in 1992).

Sources: Finnish Composers' Copyright Society; National Board of Customs: foreign trade statistics.

Figure 5.3
Import and production of video recordings and the import of blank video cassettes 1982 – 1992



Source: Table 5.1

5.2 Video recordings imports by country of origin 1980 – 1992 and value of imports in 1992*

Country	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992		Value of imports	
	%										No.	%	FIM '000	%
Sweden	51.4	46.2	36.2	47.2	68.2	51.4	31.0	20.9	32.4	28.3	236 654	28.7	5 481	17.2
Denmark	0.0	4.3	5.7	0.8	0.9	2.2	2.0	7.4	11.6	7.1	363 589	44.0	11 467	36.0
Norway	–	1.1	1.0	0.0	0.9	0.7	0.2	0.1	0.1	0.02	1 015	0.1	190	0.6
Germany	2.9	2.1	1.9	4.0	3.6	1.4	4.6	2.3	10.8	4.64	35 513	4.3	2 060	6.5
Belgium	–	0.0	–	0.0	0.0	0.0	0.6	0.1	0.0	0.04	858	0.1	115	0.4
France	0.0	0.0	1.0	0.8	1.8	2.9	1.0	0.1	0.2	0.01	831	0.1	560	1.8
Italy	0.0	0.0	0.0	0.0	0.0	0.0	9.7	0.0	0.2	1.05	80	0.0	32	0.1
Netherlands	0.0	2.1	1.9	3.2	2.7	10.1	2.3	15.3	25.4	9.18	22 906	2.8	1 262	4.0
Great Britain	25.7	15.1	31.4	24.8	11.8	22.5	36.5	25.4	11.7	21.43	74 422	9.0	3 551	11.2
Switzerland	–	0.0	0.0	0.0	0.0	0.0	2.8	0.0	0.2	0.12	508	0.1	90	0.3
USA	5.7	2.2	1.9	1.6	4.5	2.9	6.9	3.0	2.8	2.01	24 000	2.9	4 383	13.8
Canada	–	–	0.0	–	–	0.0	0.0	0.0	0.0	0.04	685	0.1	95	0.3
Japan	8.6	25.8	17.1	16.0	4.5	0.7	1.1	0.6	3.0	11.28	11 676	1.4	1 638	5.1
Hong Kong	0.0	1.1	1.9	–	0.0	0.0	–	24.4	–	7.5	602	0.1	18	0.1
Australia	–	0.0	–	–	0.0	0.0	–	–	–	0.01	77	0.0	18	0.1
Republic of Korea	–	–	–	–	0.9	2.9	–	–	0.2	–	–	–	–	–
Soviet Union/Russia	–	–	–	–	–	0.0	–	0.0	0.0	–	28	0.0	7	0.0
Turkey	–	–	–	–	–	0.7	–	–	–	–	–	–	–	–
Unspecified	5.7	0.0	0.0	1.6	0.0	1.4	1.3	0.4	0.4	7.18	52 062	6.3	873	2.7
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	825 506	100.0	31 840	100.0

* Country of origin refers to the country where the recording has been duplicated, which in many cases is not the same as the original country of production.

Source: SVT1A: Foreign trade, National Board of Customs.

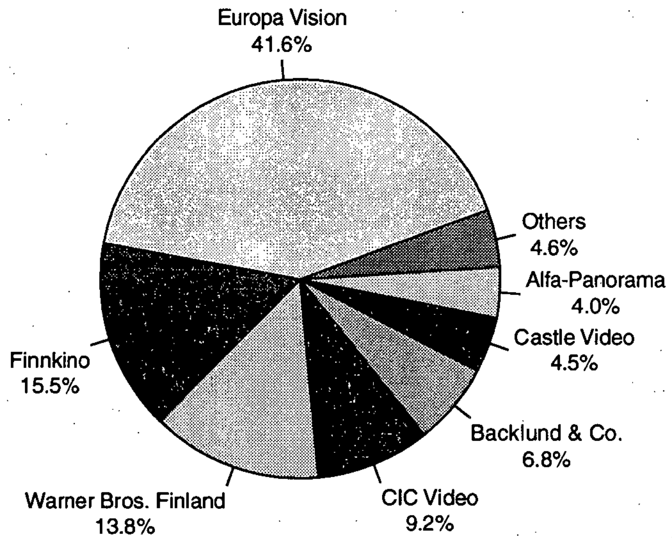
5.3 Turnover of video recording markets 1980 – 1992*

	Turnover	Video rentals		Sell-through	
	FIM million	FIM million	%	FIM million	%
1980	3	3	100	–	–
1981	10	10	100	–	–
1982	30	29	97	1	3
1983	75	73,5	98	1.5	2
1984	145	142	98	3	2
1985	190	185	97	5	3
1986	205	198	97	7	3
1987	210	196	93	14	7
1988	225	200	89	25	11
1989	255	220	86	35	14
1990	305	235	77	70	23
1991	265	175	66	90	34
1992	255	150	59	105	41

* Data based on estimates published by Finnish IFPI members.

Source: Finnish Group of IFPI.

Figure 5.4
Market shares of videocassette distributors in 1993 (rental and sell-through)



*Calculated on the basis of the wholesale value of sales by Finnish IFPI members.

Source: Finnish Group of IFPI.

5.4 Videos examined by country of origin 1988 – 1992*

	1988		1989		1990		1991		1992	
	No.	%	No.	%	No.	%	No.	%	No.	%
USA	2 359	67.4	1 834	61.2	1 265	45.8	1 030	53.7	718	49.1
Finland	96	2.7	93	3.1	419	15.2	277	14.4	351	24.0
Great Britain	294	8.4	384	12.8	515	18.7	325	16.9	207	14.1
Germany	30	0.9	50	1.7	148	5.4	67	3.5	38	2.6
Scandinavian countries	23	0.7	18	0.6	91	3.3	35	1.8	36	2.5
France	52	1.5	48	1.6	71	2.6	32	1.7	29	2.0
Italy	43	1.2	99	3.3	69	2.5	33	1.7	25	1.7
Other and co-productions	605	17.3	472	15.7	183	6.6	119	6.2	59	4.0
Total	3 502	100.0	2 998	100.0	2 761	100.0	1 918	100.0	1 463	100.0

* Films and programmes examined by the State Office of Film Censorship.

Source: State Office of Film Censorship.

5.5 Examined video recordings by type of programme 1990 – 1992*

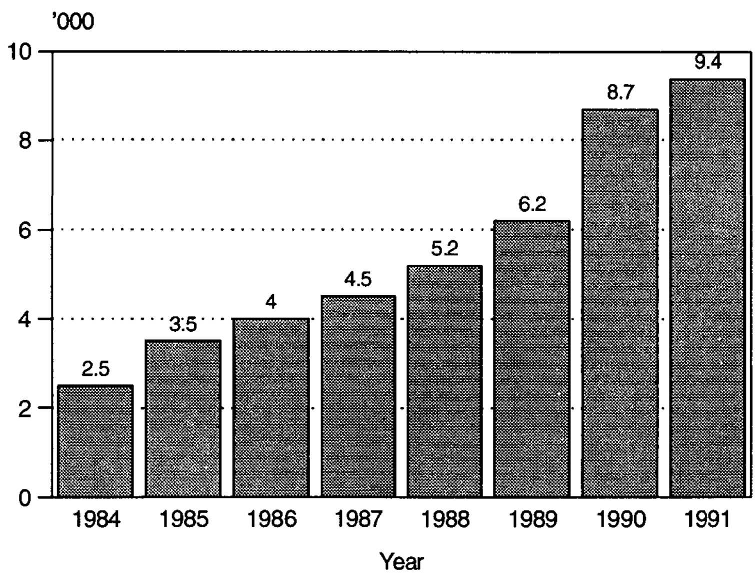
Type of programme	1990		1991		1992	
	No.	%	No.	%	No.	%
Fiction	1 891	67.3	1 314	68.7	765	52.3
Animation	305	10.9	237	12.4	158	10.8
Documentary	222	7.9	85	4.4	361	24.7
Others**	392	14.0	276	14.4	179	12.2
Total	2 810	100.0	1 912	100.0	1 463	100.0

* Films and programmes examined by the State Office of Film Censorship.

** Includes e.g. music (125 recordings in 1992), adult videos (40 recordings) and advertising and marketing (14). In 1990 and 1991 most of the material in this class consists of videos for which data on type of programme are missing.

Source: State Office of Film Censorship.

Figure 5.5
Number of video titles available 1984 – 1991



Source: Finnish Group of IFPI; State Office of Film Censorship.

5.6 Video rental and sales outlets in 1990 and 1991*

	Rental shops				Sales outlets			
	1990		1991		1990		1991	
	No.	%	No.	%	No.	%	No.	%
Specialist dealers	120	6.1	80	7.1	50	7.1	80	5.2
Department stores/supermarkets	150	7.6	400	35.6	400	57.1	550	35.8
Others**	1 700	86.3	645	57.3	250	35.7	905	59.0
Total	1 970	100.0	1 125	100.0	700	100.0	1 535	100.0

* Estimates.
** Includes gas stations, kiosks, bookshops, etc.

Source: Finnish Group of IFPI.

5.7 Daily reach of video and average viewing time 1988/89 – 1993

	1988/89	1989/90	1990/91	1991/92	1993	1988/89	1989/90	1990/91	1991/92	1993
	%					Minutes/day				
All	8	9	11	12	12	6	7	10	11	10
Access to video										
Has access	..	17	19	18	17	.	13	16	16	14
Sex										
Women	7	8	10	11	11	5	7	9	10	9
Men	9	10	13	14	14	7	8	11	12	11
Age										
3 – 9 years*	10	12	18	23	26	7	8	15	22	25
10 – 14 years	14	15	20	22	19	9	12	17	17	16
15 – 24 years	9	10	13	15	17	7	7	11	14	15
25 – 34 years	13	14	17	18	16	11	12	17	19	14
35 – 44 years	10	11	13	13	14	7	8	10	10	10
45 – 64 years	4	6	7	8	8	3	4	6	6	6
65 – years	1	6	2	5	6	1	1	2	4	5
Occupation										
Farmers	3	5	6	7	6	1	4	5	6	4
Blue-collar	7	9	11	12	12	6	7	10	11	11
Lower white-collar	7	8	10	11	12	5	6	8	9	9
Upper white-collar	8	8	10	10	11	6	6	7	8	9
Schoolchildren & students	11	12	15	17	16	9	10	15	16	14

* All other data in the Table describe viewing for age groups over 9.

Sources: Finnpanel Oy; YLE Research and Development.

5.8 Primary uses of VCRs in 1984, 1986, 1989 and 1991

	Timeshift	Recording for permanent use	Viewing rented/ purchased videos	Viewing own recordings	Other or N/A	Total
	% of those with access to VCR					
Total 1984	71	–	24	3	3	100
Total 1986	74	–	19	2	5	100
Total 1989	78	3	14	2	3	100
Total 1991	73	10	11	3	3	100
1991						
Age 10 or over						
Sex						
Women	74	11	10	3	2	100
Men	73	10	11	3	3	100
Age						
10 – 14 years	77	11	10	1	0	100
15 – 24 years	73	9	16	1	1	100
25 – 44 years	71	13	11	2	1	100
45 – 64 years	78	7	6	5	4	100
65 – years	55	10	8	9	10	100
Age 15 or over						
Stage of life						
Unmarried, living at home with parents (age 10–30 years, no children)	73	11	14	2	–	100
Other unmarried, divorced or widowed (no children under 18, age under 45)	73	6	17	1	2	100
Other unmarried, divorced or widowed (no children under 18, age 45+)	62	13	10	2	12	100
Married or living together (no children under 18, age under 45)	78	8	11	1	2	100
Married or living together (no children under 18, age 45+)	75	6	6	7	5	100
Married or living together (youngest child 0–6 yrs)	64	18	12	4	2	100
Married or living together (youngest child 7–17 yrs)	78	9	7	2	2	100
Single parent (children under 18)	69	17	13	2	–	100
Place of residence						
Urban	73	11	10	3	2	100
Non-urban	72	10	11	3	4	100

Sources: Ministry of Education video survey 1989; Statistics Finland leisure survey 1991.

5.9 Public library video recording collections, number of times viewed and number of lendings 1985 – 1992

	Video recordings	Lendings	Number of times viewed in library
	'000		
1985	..	..	6.1
1986	..	..	3.4
1987	5.1	109.3	4.6
1988	9.9	206.1	5.0
1989	19.4	438.0	4.8
1990	37.8	817.4	6.2
1991	68.5	1 565.1	8.7
1992	106.8	2 515.2	10.4

Source: National Board of General Education, Ministry of Education.

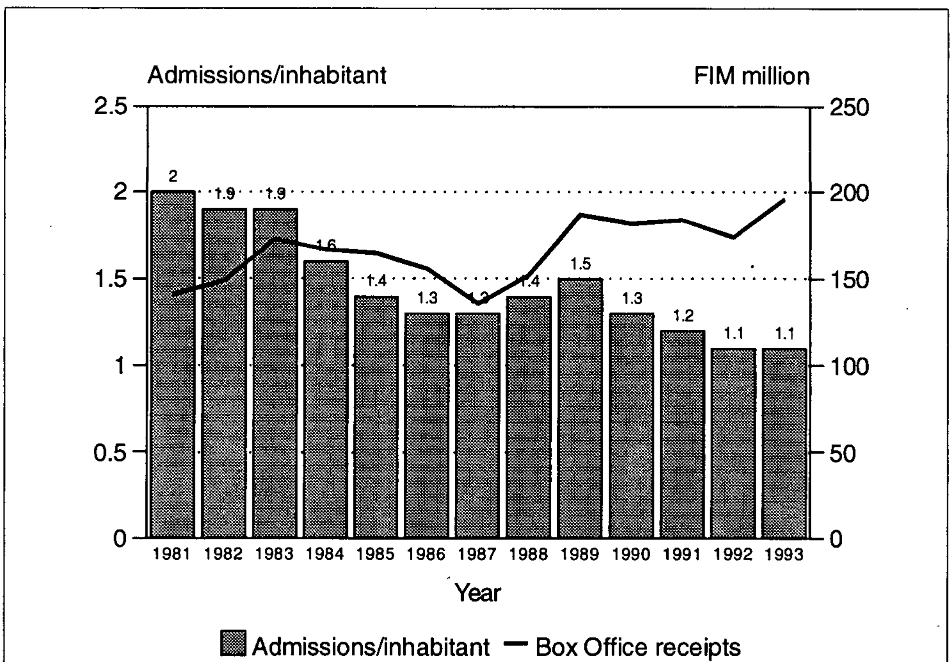
6 Films

The film industry in Finland has suffered serious setbacks as other mass media have continued to grow and expand. In the 1980s, the main challenge came from video and television, which in turn was fighting for its survival against video and cable television.

In this situation of stiffening competition, the number of cinema admissions declined steadily throughout the 1980s. Towards the very end of the decade the numbers picked up, but this turned out to be a temporary development: from 1990 onwards the numbers have been declining again.

In 1993, Finnish people went to the cinema 5.8 million times, i.e. no more than approximately once a year per inhabitant. Only twelve years earlier in 1980, the figure was almost twice as high at 9.9. million or twice a year/inhabitant. (Table 6.2.)

Figure 6.1
Cinema admissions per inhabitant and Box Office receipts 1981 – 1993



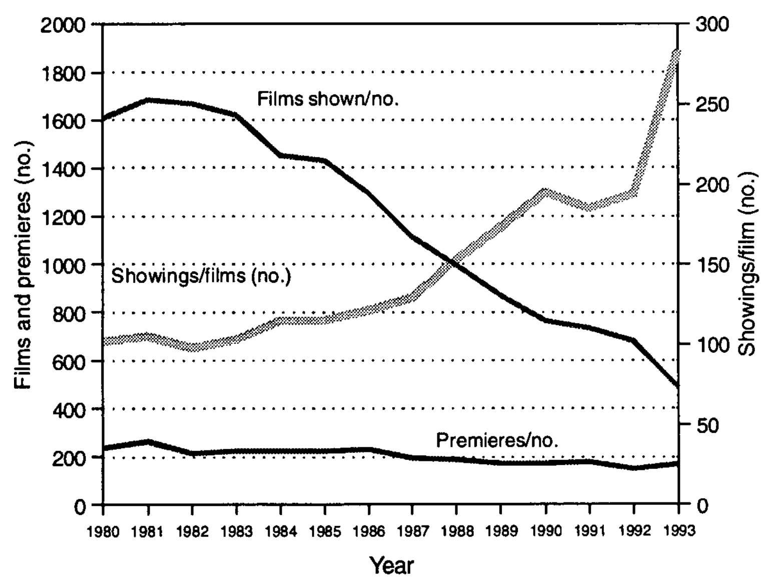
Source: Table 6.2

The film business has adapted to the new situation: the number of cinemas in the country has decreased, as has the average size of auditoria. The number of films in circulation and the number of premieres have both dropped very sharply, and cinemas have become heavily dependent on the box office of a handful of most popular films.

Although the number of cinemas in the country has been declining, there has been no dramatic change in the number of auditoria; in fact for a short period during the early 1980s the number of auditoria increased. Especially in larger cities cinemas with one single auditorium have increasingly been replaced by movie centres with several auditoria. At the same time, the average size of auditoria has declined. The average number of seats has dropped by one third. In 1993, there were a total of 242 cinemas in Finland, and within these 335 auditoria. Three cinemas out of four were in urban areas. In 1992, there were just three urban communities that did not have a single theatre. In rural communities, three out of four still have no cinema theatre. (Table 6.2.)

Compared with the early 1980s, the annual number of films shown in theatres has dropped to one third. In 1980, the figure was 1 608; by 1993, it was down to 487. The number of premieres has also sharply declined. In 1980, the number of premieres was 236, in 1992 just 168. (Table 6.1.)

Figure 6.2
Films shown, premieres and average number of showings 1980 – 1993



Source: Table 6.1

The decline in the number of premieres and films shown has been particularly sharp since the-mid 1980s. However, the smaller total number of films is shown more and more frequently: since the early 1980s the average number of showings has increased from around one hundred to just under three hundred in 1993. (Table 6.1.)

With the continuing decline in the number of premieres, the proportion of American films has continued to increase. In the early 1980s they still accounted for less than half of all premieres, but in the 1990s two thirds of all premiere movies in Finland are produced in the United States. The proportion of other countries in the category of foreign-produced films remains at less than 10 per cent. The most important producers in the category are Scandinavian countries as well as France. In recent years domestic films have accounted for something like 10 per cent of all movie premieres, and their viewer ratings have varied around 10 per cent of the film-going audience. (Table 6.3.)

Feature films represent perhaps the most visible part of domestic film production, but counted in terms of title numbers they are still a fairly minor category. In 1992, for example, a total of 161 domestic films were examined by the State Office of Film Censorship (including so-called short films, advertising films, trailers and video films). To this figure must be added a total of 4 700 advertising films that were shown on television in 1991. The production of advertising films has increased dramatically in Finland since the beginning of Channel Three. (Table 6.7.)

A major reorganization took place in the Finnish film industry in the mid-1980s when Finnkino was founded in 1986 to continue the operations of three major film companies (Kinosto, Adams Filmi and Savoy Filmi). The transaction included 135 cinemas. Some of these have subsequently been closed down; others have been sold off to local owners.

At year-end 1992 Finnkino had 92 auditoria, or over one quarter of all auditoria in the country. The company's share of all revenues from ticket sales has been in the region of 60-65 per cent. Its operations are concentrated in larger towns, where it controls the majority of auditoria.

Finnkino is also the biggest film distributor in Finland, with by far the highest proportion of all imported premiere movies. In the early 1990s, Finnkino accounts for just over half of all premieres, while the combined share of two other major distributors (Warner Bros and United Pictures) is around one quarter. A total of 13 smaller distributors accounted for the import of the remaining one quarter in 1992. (Table 6.4.)

In spring 1991 Finnkino diversified its operations and went into the business of video distribution by acquiring one of the biggest importers in the business, the Nordic Film Group.

In the late 1980s Finnkino's subsidiary National Filmi was one of the country's biggest film producers. However, with the declining number of film-goers, the company made considerable losses especially with its major productions and eventually was forced to pull out of the business of film production.

There remain four companies in Finland that are engaged in the production of feature films on a more or less regular and continuous basis: Filminor, Reppufilmi, Filmituotanto Spede Pasanen/Spede Team and Villealfa Filmproductions. Otherwise the Finnish film industry is characterized by the relatively large share of small and often temporary production companies. (Table 6.5.)

Out of the 170 feature films produced in Finland in 1983–92, the four biggest producers accounted for almost one third, or a total of 57 films. The remaining 113 films were divided between more than 50 producers. The majority of these produced just one or at best two films.

The number of feature films broadcast on television continued to increase steadily year by year up until 1986. Then, during a single year, the number of films on television almost doubled when Channel Three went on the air. During the peak years of 1990 and 1991, a total of almost 700 feature films were shown per year on the country's three nationwide channels. (Table 6.8.) In 1992, YLE, MTV and Channel Three showed a total of 618 films, out of which 16 per cent were domestic films. In addition, Filmnet (which operates on a subscriber basis) distributes feature films on a 24-h basis.

On television, domestic films attract rather large audiences, regardless of their box office in cinema theatres. In recent years the viewer ratings for the most popular domestic films on television have been in excess of one million.

Statistical sources

The annual film statistics published by the Finnish Film Foundation is an important data source on the Finnish film industry. The publication includes data on cinema operations, domestic film production and imported films as well as film showings.

With the exception of feature films shown on television, the State Office of Film Censorship examines all films intended for public showing in Finland. The Office maintains statistics on the films it has reviewed and graded.

The annual data on films shown on television have been obtained directly from the respective television companies. Data on the viewer ratings for televised domestic films are to be found in the Finnish Film Foundation's publication.

6.1 Film showings 1980 – 1993

Year	Films shown total	Premieres	Finnish feature films	Showings	Showings/ film	Showings/ auditorium	Viewers/ showing	Finnish films share of viewers
	No.	No.	No.	'000	No.	No.	No.	%
1980	1 608	236	10	163.8	102	465	60.6	15.4
1981	1 686	263	9	176.5	105	488	53.3	13.7
1982	1 669	214	11	163.9	98	459	55.2	16.2
1983	1 622	224	12	167.1	103	454	54.4	11.8
1984	1 455	222	19	167.7	115	439	45.4	19.6
1985	1 433	224	13	164.6	115	435	40.7	21.6
1986	1 297	229	21	156.4	121	411	40.4	22.7
1987	1 115	195	13	144.1	129	405	45.2	14.7
1988	995	188	10	152.6	153	431	43.8	11.3
1989	868	171	10	150.3	173	437	48.2	7.4
1990	762	172	13	148.5	195	437	41.7	13.8
1991	733	179	12	135.3	185	406	44.6	13.0
1992	680	150	10	132.0	194	400	40.9	10.9
1993	487	168	13	138.0	284	412	41.7	6.3

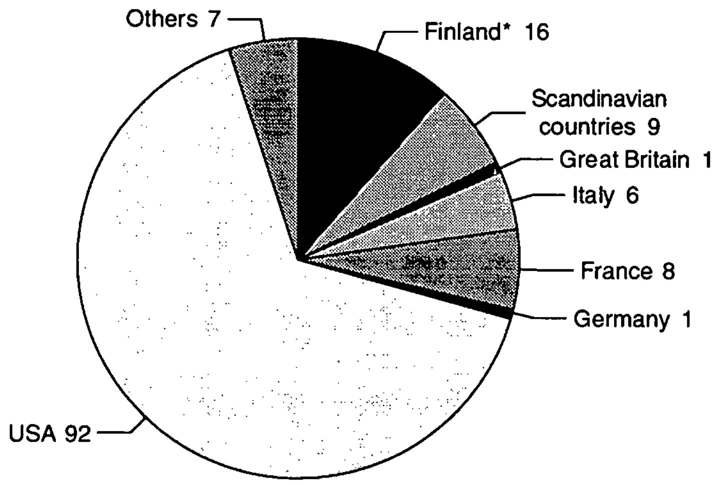
Source: Finnish Film Foundation statistics.

6.2 Number of cinemas, auditoria, number of seats, cinema admissions, Box Office and average price of cinema ticket 1980 – 1993

Year	Cinemas	Auditoria	Auditoria in urban areas	Municipalities with cinema		Seats	Cinema admis- sions	Admis- sions per inhabitant	Box Office receipts	Average price of ticket
	No.	No.	%	No.	%	'000	Million	No.	FIM million	FIM
1980	317	352	70.7	177	38.1	93.7	9.9	2.1	133	13.4
1981	312	362	68.2	176	38.2	93.0	9.4	2.0	141	15.0
1982	305	357	73.4	178	38.6	93.7	9.1	1.9	149	16.4
1983	318	368	71.2	181	39.3	89.2	9.1	1.9	173	19.0
1984	312	370	68.6	180	39.0	88.6	7.6	1.6	167	22.0
1985	305	378	69.0	184	39.9	88.2	6.7	1.4	165	24.6
1986	271	344	71.2	187	40.6	87.1	6.3	1.3	156	24.7
1987	256	328	69.8	182	39.5	74.3	6.5	1.3	136	20.9
1988	261	344	73.5	183	39.7	69.8	6.7	1.4	152	22.7
1989	262	344	75.6	177	38.7	66.6	7.2	1.5	187	25.9
1990	264	340	70.6	188	40.9	66.3	6.2	1.3	182	29.4
1991	252	333	73.3	187	40.7	63.0	6.0	1.2	184	30.6
1992	246	330	73.9	178	38.7	60.7	5.4	1.1	174	32.3
1993	242	335	..	..	..	60.8	5.8	1.1	196	34.0

Source: Finnish Film Foundation statistics.

Figure 6.3
Movie premieres by country of origin 1992



*Includes documentaries and matinée showings.

Source: Table 6.3

6.3 Film premieres by country of origin 1980 – 1992

Year	Country									
	Finland*		France		Germany		Great Britain		Italy	
		%		%		%		%		%
1980	8	3.4	5	2.1	5	2.1	21	8.9	18	7.6
1981	10	3.9	11	4.3	12	4.7	19	7.4	5	1.9
1982	17	7.9	8	3.7	11	5.1	14	6.5	4	1.9
1983	14	6.3	8	3.6	5	2.2	18	8.0	10	4.5
1984	20	9.0	12	5.4	3	1.4	20	9.0	7	3.2
1985	15	6.7	10	4.5	4	1.8	18	8.0	7	3.1
1986	29	12.7	13	5.7	2	0.9	15	6.6	4	1.8
1987	17	8.7	8	4.1	2	1.0	13	6.7	8	4.1
1988	16	9.0	10	5.6	2	1.1	9	5.1	3	1.7
1989	15	9.1	8	4.8	–	–	6	3.6	5	3.0
1990	15	9.0	10	6.0	1	0.6	6	3.6	0	–
1991	16	9.5	4	2.4	–	–	2	1.2	2	1.2
1992	16	11.4	8	5.7	1	0.7	1	0.7	6	4.3

6.3 continued

Year	Country									
	Scandinavian countries		Soviet Union/Russia		USA		Others		Total	
		%		%		%		%		%
1980	10	4.2	8	3.4	111	47.0	50	21.2	236	100.0
1981	9	3.5	17	6.6	110	42.6	65	25.2	258	100.0
1982	6	2.8	13	6.1	104	48.6	37	17.3	214	100.0
1983	8	3.6	15	6.7	103	46.0	43	19.2	224	100.0
1984	4	1.8	15	6.8	116	52.3	25	11.3	222	100.0
1985	6	2.7	11	4.9	126	56.3	27	12.1	224	100.0
1986	10	4.4	14	6.1	117	51.1	25	10.9	229	100.0
1987	8	4.1	18	9.2	112	57.4	9	4.6	195	100.0
1988	9	5.1	7	4.0	110	62.1	11	6.2	177	100.0
1989	4	2.4	5	3.0	110	66.7	12	7.3	165	100.0
1990	9	5.4	6	3.6	110	65.9	10	6.0	167	100.0
1991	8	4.7	1	0.6	120	71.0	16	9.5	169	100.0
1992	9	6.4	–	–	92	65.7	7	5.0	140	100.0

* Includes documentaries and matinée showings.

Source: Finnish Film Foundation statistics.

6.4 Feature film premieres by distributor 1983 – 1992

Distributor	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	Total 1983–1992
	Number of films										
Finnkino Oy	4	5	4	26	71	66	67	73	94	83	493
Warner Bros Oy	21	27	29	28	26	30	39	38	24	20	282
United Pictures	19	19	31	18	15	24	26	24	20	18	214
Kosmos-Filmi Oy	21	16	13	16	18	7	5	6	1	0	103
Adams Filmi Oy*	16	24	31	12	0	0	0	0	0	0	83
Kinosto Oy*	18	22	26	26	0	0	0	0	0	0	92
Europa Vision Oy	18	11	10	16	22	18	9	5	0	0	109
Suomi-Filmi Oy	*19*	*21*	*8*	*3*	*1*	*0*	*0*	*0*	*0*	*0*	*52*
Tralag Oy	9	12	10	3	1	1	0	0	0	0	36
Cine-Studio Oy	12	8	4	0	0	0	0	0	0	0	24
Gaudeamus Oy	6	5	4	7	4	4	2	5	8	5	50
Cic (UIP)	*4*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*4*
Senso Film Oy						3	6	5	6	3	23
Walhalla Ry						3	2	4	5	5	19
Other *distributors***	64	58	50	74	37	32	15	12	21	16	379
Total	231	228	220	229	195	188	171	172	179	150	1 963

* Adams Filmi Oy, Kinosto Oy and Savoy Filmi were merged in 1986 with Finnkino Oy (during 1983–1986 Savoy Filmi imported a total of 14 films).

** During 1983-1992 there were a total of more than 50 other film distributors in the country.

Source: Finnish Film Foundation statistics.

6.5 Producers of Finnish films 1983 – 1992

	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	Total 1983–1992
Villealfa Filmiproductions Oy	1	1	3	1	4	2	3	3	–	1.5**	19.5
Reppufilmi Oy	2	3	1	4	–	–	1	1	2	2	16
Filmituot. Spede Pasanen Oy*	1	2	2	2	2	1	–	–	–	1	11
Filminor Oy	–	1	–	1	1	1	0.5 **	2	2	1.5	10
Jörn Donner Productions Oy	–	3	–	1	2	1	–	1	–	–	8
National-Filmi Oy	1	–	–	0.5 **	–	3	1	2	–	–	7.5
Produktion Visa Mäkinen	1	2	1	1	–	–	1	–	1	–	7
Skandia Filmi Oy	–	1.5 **		4	2	–	–	–	–	–	7.5
Funny Films Oy	–	–	–	1	–	–	–	–	–	–	1
Sateenkaarifilmi Oy	2	–	–	–	–	–	–	–	–	–	2
Kinosto Oy	1	1	–	1	–	–	–	–	–	–	3
University of Industrial Art	–	–	1	1	–	1	–	–	–	–	3
Kinotuotanto Oy	–	–	–	1	1	–	2	–	0,5	1	5.5
Giron-Filmi Oy	–	–	1	–	–	1	–	–	–	1	3
Elovalkia Oy	–	1	–	–	0.5 **	–	1	1	–	–	3,5
Other producers***	4	4.5	6	11.5	1.5	5	2.5	6	10.5	12	63.5
Total	13	20	15	29	14	15	12	16	16	20	170

* Includes Spede-Yhtiöt, Spede-Team Oy and Spede-Studio Oy.
** Jointly produced with some other producer.
*** A total of 54 producers that made a maximum of three films during 1983–1992.

Source: Finnish Film Foundation statistics.

6.6 Feature films reviewed and graded during 1980–1991

Year	Foreign			Finnish			Total**			Edited***	Banned***
	Taxed	Tax-free*	Total	Taxed	Tax-free*	Total	Taxed	Tax-free*	Total		
1980	344	8	352	8	5	13	352	13	365	46	14
1981	412	17	429	12	1	13	424	18	442	63	22
1982	356	18	374	12	7	19	368	25	393	48	15
1983	411	16	427	17	4	21	428	20	448	42	18
1984	389	9	398	17	5	22	406	14	420	20	22
1985	411	22	433	36	20	56	447	42	489	24	17
1986	417	24	441	22	2	24	439	26	465	18	6
1987	449	15	464	17	2	19	466	17	483	6	7
1988	354	8	362	8	4	12	362	12	374	28	2
1989	280	7	287	8	4	12	288	11	299	11	3
1990	296	5	301	16	2	18	312	7	319	9	2
1991	269	6	275	14	6	20	283	12	295	10	1

* Educational films.
** Excl. banned feature films.
*** Short and long feature films total.

Sources: State Office of Film Censorship.

6.7 Finnish films reviewed and graded 1980–1992

Year	35 mm films				16 mm films	8 mm films	Video films	Video discs	Total	MTV advertising films	Channel Three advertising films
	Feature films*	Short films	Advertising films**	Cinema advertise-ments							
1980	10	18	162	12	104	9	–	–	315	1 448	–
1981	12	19	145	14	97	15	5	–	307	1 553	–
1982	17	23	120	16	88	60	8	–	332	1 496	–
1983	16	18	88	16	107	24	12	–	281	1 559	–
1984	23	21	89	20	57	20	57	–	287	1 817	–
1985	32	20	60	19	101	5	95	–	332	1 832	–
1986	32	12	48	26	64	10	149	–	341	1 788	–
1987	21	19	61	13	58	24	203	–	399	2 086	110
1988	11	16	62	7	43	17	62	–	218	1 545	1 157
1989	13	21	51	15	59	4	77	5	245	1 621	2 115
1990	16	13	67	12	44	1	84	–	237	1 622	2 346
1991	14	25	34	5	40	–	54	–	172	1 666	3 043
1992	26	15	24	13	20	–	59	4	161	..	..

* Includes long documentary films.
** Shown at cinemas.

Source: Finnish Film Foundation statistics.

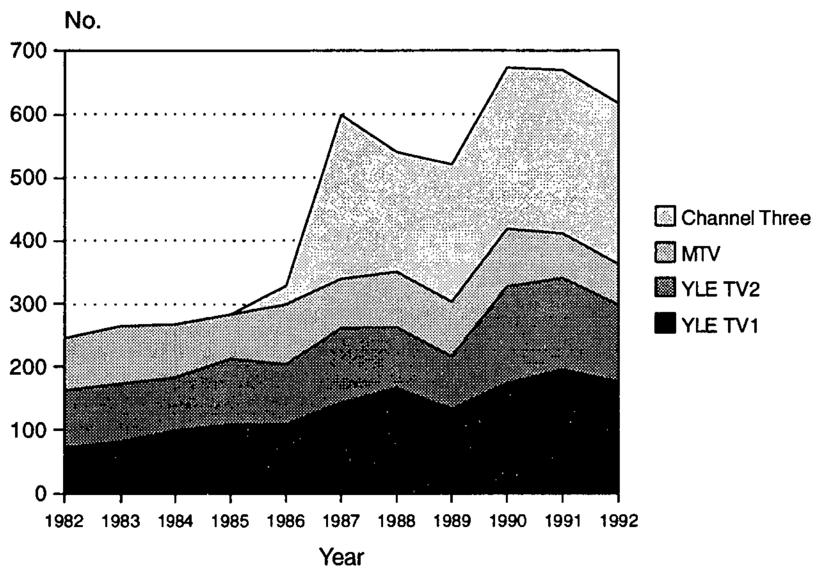
6.8 Showings of feature films on television 1982 – 1992

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	Share of Finnish films in 1992 (%)
TV1*	73	83	99	109	109	143	166	133	174	196	176	22
TV2*	90	91	84	104	95	118	97	83	153	146	122	45
MTV	83	91	84	70	95	79	88	86	92	70	65	5
Channel Three	–	–	–	–	30	260	190	219	254	258	255	0
Total	246	265	267	283	329	600	541	521	673	670	618	16

* Data for TV1 and TV2 in 1982-1991 are for operating years starting 1 June; as from 1992 calendar year.
** Channel Three started broadcasting operations in late 1986. The figure for 1986 includes films shown in December that year.

Sources: YLE; MTV Oy; Oy Kolmostelevisio Ab.

Figure 6.4
Showings of feature films on television 1982–1992



Source: Table 6.8

6.9 Biggest cinema towns in Finland in 1992

Town	No. of cinemas	No. of visits to cinema	Proportion of all visits	Visits per inhabitant	Proportion of turnover
		'000	%		%
Helsinki	44	1 998	37.0	4.0	38.0
Tampere	15	405	7.5	2.3	7.7
Turku	13	379	7.0	2.4	7.2
Oulu	12	218	4.0	2.1	4.1
Jyväskylä	5	170	3.1	2.5	3.2
Lahti	6	139	2.6	1.5	2.6
Kuopio	6	134	2.5	1.6	2.5
Vaasa	6	96	1.8	1.8	1.9
Pori	5	97	1.8	1.3	1.8
Lappeenranta	5	87	1.6	1.6	1.6
Total	117	3 723	68.9		70.6
Whole country	330	5 400	100.0	1.1	100.0

Source: Finnish Film Foundation statistics.

6.10 Top ten Finnish and foreign films: share of total admissions and Box Office 1982 – 1992

	Share of admissions %	Share of Box Office %
1982		
top ten Finnish films	14.5	..
top ten foreign films	15.7	..
1984		
top ten Finnish films	17.9	..
top ten foreign films	22.0	..
1986		
top ten Finnish films	21.4	..
top ten foreign films	29.4	..
1987		
top ten Finnish films	12.6	13.1
top ten foreign films	31.9	34.1
1988		
top ten Finnish films	10.8	11.5
top ten foreign films	31.2	34.1
1989		
top ten Finnish films	7.0	9.2
top ten foreign films	39.8	40.7
1990		
top ten Finnish films	13.1	14.3
top ten foreign films	29.7	31.0
1991		
top ten Finnish films	12.0	10.6
top ten foreign films	31.8	33.7
1992		
top ten Finnish films	10.5	10.0
top ten foreign films	31.0	32.1

Source: Finnish Film Foundation statistics.

6.11 Cinema-going during a six-month period in 1981 and 1991

	Has been to the cinema %
10 years and over	
All	
1981	41
1991	35
Women	
1981	38
1991	35
Men	
1981	44
1991	35
Age	
10–14 years	
1981	63
1991	62
15–24 years	
1981	83
1991	81
25–44 years	
1981	43
1991	40
45–64 years	
1981	14
1991	14
65– years	
1981	6
1991	4
15 years and over	
Stage of life	
Unmarried, living at home with parents (age 10-30 years, no children)	
1981	84
1991	82
Other unmarried, divorced or widowed (*no children under 18, age under 45*)	
1981	59
1991	60
Other unmarried, divorced or widowed (no children under 18, age 45+)	
1981	11
1991	9
Married or living together (no children under 18, age under 45)	
1981	62
1991	57
Married or living together (no children under 18, age 45+)	
1981	9
1991	8
Married or living together (youngest child 0–6 yrs)	
1981	35
1991	30
Married or living together (youngest child 7–17 yrs)	
1981	36
1991	30
Single parent (children under 18)	
1981	49
1991	42
Place of residence	
Urban	
1981	45
1991	38
Non-urban	
1981	29
1991	26

Source: Statistics Finland 1991 leisure survey.

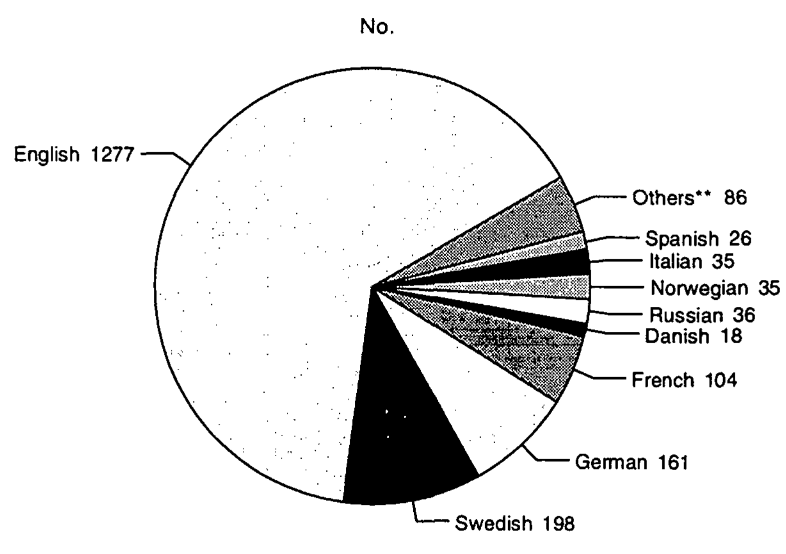
7 Books and libraries

Books

Since the latter half of the 1980s the number of book titles published in Finland has been consistently over 10 000 per annum. The bulk of these are in the non-fiction category. However, during the last couple of years of the 1980s the number of fiction titles began slowly to increase. In 1992, according to the national bibliography, fiction accounted for 16 per cent of all published titles in Finland (1 781 out of the total of 11 033 titles). (Table 7.2.)

The proportion of domestic titles has been slowly decreasing since the mid-1980s. In 1992, the figure was 67 per cent. At the same time, the share of translated literature has increased from around 10 to almost 20 per cent. A comparatively large number of titles are published in Finland in foreign languages. In 1992, 16 per cent (over 1 700 titles) of all published titles were in some other than the Finnish or Swedish language. Most of these are specialist titles in the natural sciences, technology, politics, national economy, medicine and linguistics. (Tables 7.1. and 7.3.)

Figure 7.1
Translated books published in Finland in 1991 by source language



*In addition, there were Swedish translations of 101 Finnish titles, 4 English titles and 7 books in other languages.
**Includes translations from several languages
Source: Table 7.4

By far the largest proportion of books translated into Finnish are from the English language. The figure has varied somewhat since the early 1980s, but it has consistently been over half of all translated titles. In 1991, the figure was 65 per cent. (Table 7.4.)

The figures above include all publications printed in Finland and meeting the Unesco definition of book. In addition to the titles issued by publishing houses proper, the statistics cover the series of universities and research institutes, government agencies engaged in publishing, local municipalities, organizations and vanity publishers. Also included in the figures are smaller publications with 5–48 pages.

It is estimated that there are between 500 and 600 companies, associations or similar that are engaged in publishing (see e.g. the publisher index in the national bibliography). The central organization representing book publishers proper is the Finnish Book Publishers' Association (FBPA), which in 1992 had a membership of 60 publishers.

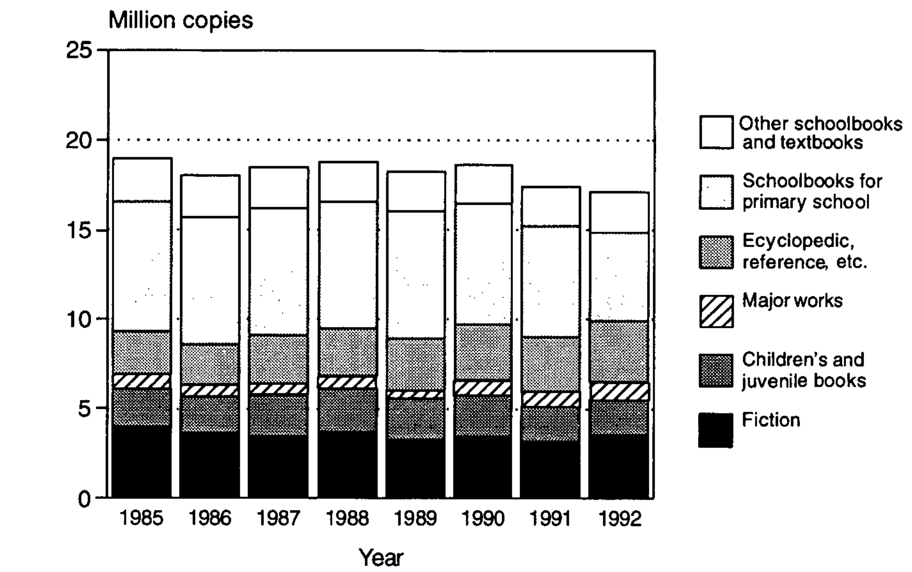
The members of the Association publish about half of the total annual volume of titles issued in Finland. In 1992 roughly one third of the titles published by FBPA members were in the category of fiction (of which about half were children's books); one third were schoolbooks and textbooks; and the remaining one third non-fiction titles and encyclopedic, reference and other major works (Table 7.5.)

Finnish book publishers are traditionally divided into two categories: large and medium-sized general-interest publishers and more specialized minor publishers. The following seven publishers are counted in the category of general-interest publishers: Gummerus, Karisto, Kirjayhtymä, Otava, Tammi, Weilin+Göös and WSOY.

In 1992, the seven major and medium-sized general-interest publishers accounted for about 60 per cent of all titles published by the FBPA members and for 70 per cent of their sales in value and volume terms (Tables 7.6 and 7.7). Approximately 40 per cent of the volume sold were schoolbooks and textbooks. This figure has been declining since the schools have introduced austerity budgets in response to the ongoing recession. The share of other non-fiction titles and encyclopedic, reference etc. books was one quarter, and the remaining 30 per cent of volume sales consisted of fiction.

However, the number of specialized publishers as well as the share of their titles in the book markets have recently been increasing. According to the sales statistics of the FBPA, the share of specialized publishers increased from 15 per cent in 1981 to almost one third in 1992. Specialized publishers have indeed been making an increasingly visible presence on the book markets since the early 1980s. (Table 7.8.) However, it is important to note

Figure 7.2
General-interest publishers' book sales by type of literature 1985 – 1992



Source: Table 7.6

here that in earlier years the statistics did not cover small publishers to the same extent as nowadays, which means that in the early 1980s their market share has been somewhat higher than indicated by the statistics.

During the early 1990s about half of all book titles have been sold through bookshops and book wholesalers. Compared with the 1980s, the figure has dropped by around ten per cent. According to FinStat's business register, there were a total of 462 bookshops (excluding department stores) and 218 second-hand bookshops in Finland in 1991. (Tables 7.9 and 7.10.)

Another important channel for book sales is represented by book clubs. Although the number of domestic book clubs has dropped from around 20 in the early 1980s to just six, it is estimated that they still account for about one fifth of all general fiction and non-fiction sold in Finland. The book clubs are controlled by the biggest publishers in the country. (Table 7.11.)

Hire purchase is traditionally a significant channel for the sale of major works and encyclopedic and reference books in Finland. In 1992, hire purchase accounted for almost one quarter of the total value of book sales by the general-interest publishers. (Table 7.9.)

Libraries

In 1992 public libraries in Finland had a total of about 1 350 outlets. This figure includes main libraries, branch libraries, institutional libraries, mobile libraries and boat libraries. The figure has been sharply decreasing in recent years; in 1980 it still stood at 1 800. Most particularly, the number of branch libraries has been on the decrease (Table 7.12.)

In spite of the declining number of outlets, libraries' book collections have been growing. In 1992, the total number of titles in library collections amounted to 36 million, which translates into 7 titles per inhabitant. (Table 7.13.)

The share of the population using the services of public libraries declined towards the end of the 1980s, but in recent years it has been growing again. In 1992, almost half or 48 per cent of the population borrowed books from public libraries. (Table 7.13.)

The trends in development have been very similar in books lent for home reading: in 1992 the number was 19 volumes per inhabitant, while the number per customer averaged 40 books. Children's books accounted for 40 per cent of all books lent, adult fiction for 35 per cent, and adult non-fiction for 25 per cent. During the past couple of years the proportion of children's books has clearly decreased, mainly at the expense of adult non-fiction titles. (Table 7.14.)

In 1992 public libraries spent a total of FIM 156 million in new books. However, in recent years libraries have had less money than earlier to spend on books (see Table 6 in Chapter 10.). The cutbacks in library budgets have had particularly serious effects in genres where circulation figures are low even at the best of times.

In 1992, the number of librarians working in public libraries was around 1 700; other personnel numbered around 2 000.

Statistical sources

Since 1954 statistics on new book titles published in Finland have been compiled by the Helsinki University Library, which receives free copies of all new titles from printing shops and publishers. In earlier years (and particularly during the 1970s) the reliability of these statistics was undermined by the fact that the Library had difficulty in completing the lists for each year. The classification is based on Unesco's recommendations for compiling book statistics.

The Finnish Book Publishers' Association compiles annual statistics on the production of its member publishers. These statistics provide data on the titles published as well as sales by value and volume for different categories of books. Over the past years the data for the general-interest publishers have been comprehensive, but the quality and comprehensiveness of data concerning smaller publishers have tended to vary somewhat.

Other sources of book publishing and sales include FinStat's industrial statistics, the sales statistics of wholesalers and retailers, as well as the Yearbook of corporate enterprises and personal businesses in Finland.

The data on the units of public libraries, library materials, lendings and other operations as well as staff members are from annual statistics compiled on public libraries, which up until 1988 was prepared by the National Board of General Education. From 1989 onwards it has been compiled by the Cultural Department of the Ministry of Education.

7.1 Books published in Finland 1980 – 1992 (total number of titles)*

Year	Finnish books				Translated books				Other languages		Total		
	Finnish-language**	Swedish-language	Total	% of all titles	Into Finnish	Into Swedish	Total	% of all titles	No.	% of all titles	No.	%	First editions
	No.				No.								
1980	4 387	342	4 729	72.6	959	56	1 015	15.6	767	11.8	6 511	100.0	6 294
1981***	5 578	475	6 053	73.6	1 155	68	1 223	14.9	951	11.6	8 227	100.0	8 008
1982	5 040	449	5 489	73.8	884	65	949	12.8	998	13.4	7 436	100.0	7 213
1983	5 881	526	6 407	74.6	874	85	959	11.2	1 228	14.3	8 594	100.0	8 264
1984	5 892	511	6 403	74.8	892	83	975	11.4	1 185	13.8	8 563	100.0	8 098
1985	6 181	474	6 655	74.5	906	89	995	11.1	1 280	14.3	8 930	100.0	8 358
1986	6 183	446	6 629	76.2	996	97	1 093	12.6	972	11.2	8 694	100.0	7 978
1987	6 320	450	6 770	74.3	971	78	1 049	11.5	1 287	14.1	9 106	100.0	8 397
1988	7 016	523	7 539	72.6	1 458	134	1 592	15.3	1 255	12.1	10 386	100.0	9 585
1989	6 615	463	7 078	70.1	1 420	107	1 527	15.1	1 492	14.8	10 097	100.0	9 365
1990	6 512	598	7 110	70.0	1 562	111	1 673	16.5	1 370	13.5	10 153	100.0	9 482
1991	6 784	525	7 309	65.2	1 976	112	2 088	18.6	1 811	16.2	11 208	100.0	10 439
1992	6 838	494	7 332	66.5	1 872	94	1 966	17.8	1 735	15.7	11 033	100.0	..

* Based on the data of the national bibliography as classified by subject under Finnish literature. Statistics drawn up on the basis of Unesco recommendations, see Unesco statistical yearbook. Small publications (5–48 pages) included in the figures.
** Includes books in two or more languages.
*** Owing to new legislation on free copies and improved information, large numbers of titles were recorded from previous years.

Source: Helsinki University Library, bibliographical department.

7.2 Non-fiction, fiction, schoolbooks and children's books: total number of titles 1980 – 1992*

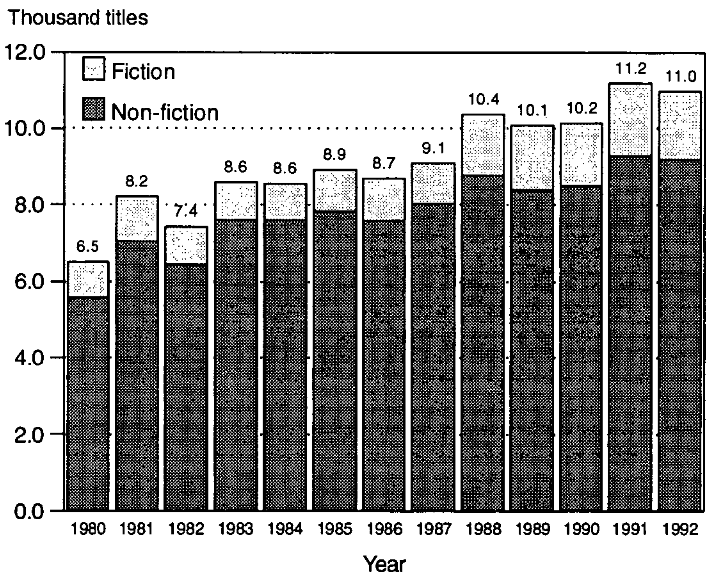
Year	Non-fiction		Fiction**		Total		Out of which			
							Schoolbooks		Children's books	
	No.	%	No.	%	No.	%	No.	%	No.	%
1980	5 590	85.9	921	14.1	6 511	100.0	531	8.2	228	3.5
1981	7 049	85.7	1 178	14.3	8 227	100.0	575	7.0	403	4.9
1982	6 454	86.8	982	13.2	7 436	100.0	450	6.1	118	1.6
1983	7 604	88.5	990	11.5	8 594	100.0	542	6.3	254	3.0
1984	7 610	88.9	953	11.1	8 563	100.0	670	7.8	318	3.7
1985	7 847	87.9	1 083	12.1	8 930	100.0	692	7.7	290	3.2
1986	7 588	87.3	1 106	12.7	8 694	100.0	631	7.3	268	3.1
1987	8 021	88.1	1 085	11.9	9 106	100.0	638	7.0	353	3.9
1988	8 777	84.5	1 609	15.5	10 386	100.0	760	7.3	579	5.6
1989	8 395	83.1	1 702	16.9	10 097	100.0	600	5.9	583	5.8
1990	8 505	83.8	1 648	16.2	10 153	100.0	615	6.1	659	6.5
1991	9 285	82.8	1 923	17.2	11 208	100.0	590	5.3	893	8.0
1992	9 252	83.9	1 781	16.1	11 033	100.0	498	4.5	863	7.8

* Based on the data of the national bibliography as classified by subject under Finnish literature. Statistics drawn up on the basis of Unesco recommendations, see Unesco statistical yearbook. Small publications (5-48 pages) included in the figures.

** Fiction includes prose, children's books, juvenile books and poetry.

Source: Helsinki University Library, bibliographical department.

Figure 7.3
Book production: number of titles 1980 – 1992



Source: Table 7.2

7.3 Total number of books published in Finland under different categories 1980 – 1991*

Category	1980	1985	1986	1987	1988	1989	1990	1991	1991 %	Finnish-language	Swedish-language	Other language
General interest	297	329	325	384	361	397	307	335	3.0	271	26	38
Philosophy, psychology	165	191	176	188	156	165	165	189	1.7	161	7	21
Religion	365	360	333	342	382	326	286	339	3.0	299	22	18
Sociology, statistics	212	233	211	215	194	196	176	219	2.0	165	16	38
Politics, national economy	564	795	766	807	938	949	776	943	8.4	656	51	236
Law, public administration	447	625	582	626	771	727	735	813	7.3	733	42	38
Warfare, military science	69	61	56	50	65	76	68	94	0.8	81	8	5
Education	381	533	429	463	597	633	539	617	5.5	526	36	55
Ethnology, folklore	76	98	78	87	72	77	65	80	0.7	56	7	17
Linguistics	264	347	316	319	324	310	219	394	3.5	176	67	151
Mathematics	180	257	219	202	215	208	840	241	2.2	117	8	116
Natural sciences	507	683	577	744	710	695	422	905	8.1	512	27	366
Medicine	351	415	396	471	490	520	1 041	524	4.7	329	18	177
Engineering, technology, industry	614	1 053	1 236	1 131	1 247	1 205	297	1 113	9.9	822	26	265
Agriculture and forestry	204	433	372	404	391	335	117	374	3.3	326	14	34
Household management	83	121	98	103	114	118	453	111	1.0	107	3	1
Business economics, transport	217	403	461	453	507	499	544	538	4.8	413	35	90
Architecture, art	198	330	326	392	404	438	115	625	5.6	550	25	50
Games, sport	54	98	75	102	124	105	368	129	1.2	121	6	2
History of literature	35	46	58	56	68	70	59	56	0.5	38	6	12
Literature	921	1 083	1 106	1 085	1 609	1 392	1 648	1 923	17.2	1 764	115	44
Geography, travel	79	111	84	92	115	118	87	110	1.0	87	6	17
History, biographies	228	325	414	390	532	538	472	536	4.8	450	66	20
Unclassified**	–	–	–	–	–	–	354	–	–	–	–	–
Total	6 511	8 930	8 694	9 106	10 386	10 097	10 153	11 208	100	8 760	637	1 811

* Includes small publications.
** As from 1990 the data have been provided on CD-ROM. The disk for 1990 contains 354 titles for which no classification data are given.

Source: Helsinki University Library, bibliographical department.

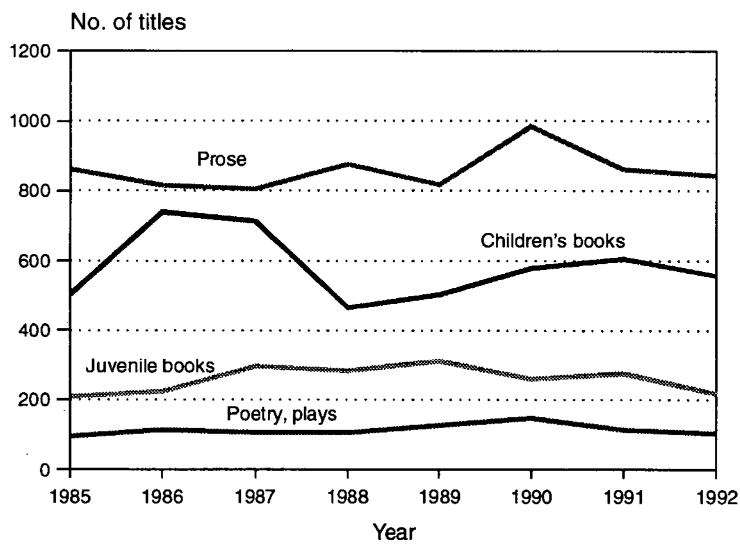
7.4 Translated books published in Finland 1981 – 1991 by source language

Source language	1981		1985		1986		1987		1988		1989		1990		1991	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Translations into Finnish																
English	612	53.0	520	57.4	554	55.6	557	57.4	859	58.9	795	56.0	940	60.1	1 277	64.6
Swedish	165	14.3	124	13.7	153	15.4	149	15.3	186	12.8	216	15.2	184	11.8	198	10.0
German	103	8.9	96	10.6	96	9.6	74	7.6	117	8.0	147	10.4	128	8.2	161	8.1
French	68	5.9	43	4.7	49	4.9	61	6.3	68	4.7	63	4.4	92	5.9	104	5.3
Danish	28	2.4	10	1.1	10	1.0	26	2.7	20	1.4	21	1.5	30	1.9	18	0.9
Russian	50	4.3	26	2.9	32	3.2	22	2.3	60	4.1	51	3.6	40	2.6	36	1.8
Norwegian	31	2.7	22	2.4	21	2.1	13	1.3	20	1.4	16	1.1	34	2.2	35	1.8
Italian	17	1.5	11	1.2	9	0.9	16	1.6	27	1.9	28	2.0	28	1.8	35	1.8
Spanish	9	0.8	6	0.7	7	0.7	8	0.8	17	1.2	20	1.4	20	1.3	26	1.3
Others*	72	6.2	48	5.3	65	6.5	45	4.6	84	5.8	63	4.4	67	4.3	86	4.4
Total	1 155	100.0	906	100.0	996	100.0	971	100.0	1 458	100.0	1 420	100.0	1 563	100.0	1 976	100.0
Translations into Swedish																
Finnish	63	92.6	86	96.6	89	91.8	68	87.2	124	92.5	101	94.4	103	92.8	101	90.2
English	1	1.5	2	2.2	1	1.0	4	5.1	3	2.2	3	2.8	2	1.8	4	3.6
Others*	4	5.9	1	1.1	7	7.2	6	7.7	7	5.2	3	2.8	6	5.4	7	6.3
Total	68	100.0	89	100.0	97	100.0	78	100.0	134	100.0	107	100.0	111	100.0	112	100.0

* Includes translations from several languages

Source: Helsinki University Library, bibliographical department.

Figure 7.4
Fiction titles published in Finland by type of literature 1985 – 1992 (Titles by FBPA members)



Source: Table 7.5

7.5 Titles produced in Finland 1985 – 1992 by type of literature*

Type of literature	1985 No.	%	1986 No.	%	1987 No.	%	1988 No.	%	1989 No.	%	1990 No.	%	1991 No.	%	1992 No.	%
Finnish fiction																
Prose	392	7.9	312	5.8	337	6.1	332	6.2	330	5.9	365	6.0	383	6.8	319	6.1
Children's books	141	2.8	177	3.3	140	2.5	138	2.6	154	2.8	164	2.7	157	2.8	168	3.2
Juvenile books	83	1.7	78	1.5	131	2.4	91	1.7	128	2.3	118	2.0	134	2.4	97	1.8
Translated fiction																
Prose	471	9.4	505	9.4	470	8.5	546	10.2	489	8.8	621	10.3	480	8.5	525	10.0
Children's books	362	7.3	563	10.5	574	10.4	326	6.1	348	6.3	415	6.9	449	7.9	389	7.4
Juvenile books	125	2.5	144	2.7	163	3.0	191	3.6	182	3.3	140	2.3	140	2.5	120	2.3
Poetry, plays	95	1.9	113	2.1	106	1.9	105	2.0	126	2.3	148	2.5	114	2.0	103	2.0
Non-fiction	1 371	27.5	1 465	27.4	1 536	27.9	1 606	30.0	1 632	29.3	1 832	30.4	1 653	29.2	1 655	31.4
Encyclopedic, reference	52	1.0	65	1.2	89	1.6	79	1.5	92	1.7	138	2.3	160	2.8	140	2.7
Schoolbooks for primary school	1 063	21.3	1 054	19.7	1 000	18.1	1 066	19.9	1 079	19.4	1 049	17.4	1 102	19.4	795	15.1
Other schoolbooks	834	16.7	877	16.4	966	17.5	867	16.2	1 001	18.0	1 044	17.3	897	15.8	954	18.1
Total	4 989	100.0	5 353	100.0	5 512	100.0	5 347	100.0	5 561	100.0	6 034	100.0	5 669	100.0	5 265	100.0
Proportion of new titles as % of total production	53.2		56.2		53.9		57.5		50.2		51.6		52.2		54.6	

* Production of FBPA members responding to the Association's questionnaire. The number of members has varied from year to year. In 1992 responses came in from 59 out of the 60 members.

Source: The Finnish Book Publishers' Association.

7.6 Book sales by type of literature 1980 – 1992*

Type of literature	1980 thousand copies	1980 %	1985 thousand copies	1985 %	1986 thousand copies	1987 thousand copies	1988 thousand copies	1989 thousand copies	1990 thousand copies	1990 %	1991 thousand copies	1991 %	1992 thousand copies	1992 %
General-interest publishers**														
Fiction	3 030	14.9	3 981	20.9	3 643	3 447	3 669	3 285	3 473	18.6	3 135	18.0	3 542	20.7
Children's and juvenile books	2 347	11.5	2 085	11.0	1 995	2 326	2 472	2 270	2 263	12.1	1 942	11.1	1 947	11.4
Major works			836	4.4	696	622	667	453	855	4.6	884	5.1	1 002	5.8
Encyclopedic, reference, etc. (1980: Major works and Encyclopedic, reference, etc. combined)	3 617	17.8	2 387	12.6	2 252	2 694	2 668	2 925	3 124	16.7	3 040	17.4	3 428	20.0
Schoolbooks for primary school	8 974	44.1	7 301	38.4	7 112	7 153	7 116	7 114	6 791	36.4	6 231	35.7	4 989	29.1
Other schoolbooks and textbooks	2 392	11.7	2 416	12.7	2 348	2 282	2 235	2 216	2 158	11.6	2 226	12.8	2 232	13.0
General-interest publishers total	20 359	100.0	19 006	100.0	18 046	18 524	18 827	18 263	18 664	100.0	17 458	100.0	17 140	100.0
Other publishers total	2 835	12.2	1 487	7.3	3 533	4 028	4 424	3 706	6 316	25.3	5 965	25.5	6 901	28.7
Total	23 194	100.0	20 493	100.0	21 578	22 552	23 251	21 969	24 980	100.0	23 423	100.0	24 040	100.0

* Sales reported by members of the Finnish Book Publishers' Association. The figures for different years are not fully comparable as the number of respondents has varied from year to year. In 1992 responses came in from 59 out of the 60 members.

** General-interest publishers: WSOY, Otava, Weilin+Göös, Gummerus, Tammi, Kirjayhtymä, Karisto.

Source: The Finnish Book Publishers' Association.

7.7 Value of book sales by type of literature in 1980 – 1992*

Type of literature	1980		1985		1986		1987		1988	
	FIM million	%	FIM million	%	FIM million	%	FIM million	%	FIM million	%
General-interest publishers**										
Fiction	69.4	15.9	125.3	19.4	132.4	20.3	129.2	18.1	131.2	18.4
Children's and juvenile books	29.4	6.7	42.2	6.5	43.1	6.6	51.9	7.3	47.2	6.6
Major works	181.0	41.4	120.6	18.7	107.5	16.5	123.6	17.3	92.5	13.0
Encyclopedic, reference, etc.			112.0	17.4	105.7	16.2	132.8	18.6	147.1	20.7
Schoolbooks for primary school	115.2	26.3	166.5	25.8	179.2	27.5	189.1	26.5	203.4	28.6
Other schoolbooks and textbooks	42.6	9.7	79.1	12.3	83.8	12.9	86.4	12.1	90.2	12.7
General-interest publishers total	437.6	100.0	645.7	100.0	651.7	100.0	712.9	100.0	711.6	100.0
Other publishers total	68.6	13.6	135.7	17.4	163.4	20.0	206.4	22.5	227.0	24.2
Total	506.2	100.0	781.4	100.0	815.1	100.0	919.3	100.0	938.6	100.0

continued

7.7 continued

Type of literature	1989		1990		1991		1992	
	FIM million	%	FIM million	%	FIM million	%	FIM million	%
General-interest publishers**								
Fiction	134.9	17.5	148.4	16.7	133.1	15.0	136.7	15.7
Children's and juvenile books	55.8	7.2	57.8	6.5	54.5	6.1	48.9	5.6
Major works	109.2	14.2	174.7	19.7	189.3	21.3	211.5	24.3
Encyclopedic, reference, etc.	157.4	20.4	183.2	20.7	179.5	20.2	174.6	20.1
Schoolbooks for primary school	218.2	28.3	222.1	25.1	222.3	25.0	183.7	21.1
Other schoolbooks and textbooks	95.9	12.4	100.3	11.3	111.4	12.5	113.3	13.0
General-interest publishers total	771.5	100.0	886.4	100.0	890.1	100.0	868.7	100.0
Other publishers total	156.0	16.8	313.7	26.1	340.0	27.6	376.1	30.2
Total	927.6	100.0	1200.0	100.0	1230.1	100.0	1 244.8	100.0

* Sales reported by members of the Finnish Book Publishers' Association. The figures for different years are not fully comparable as the number of respondents has varied from year to year. In 1992 responses came in from 59 out of the 60 members.

** General-interest publishers: WSOY, Otava, Weilin+Göös, Gummerus, Tammi, Kirjayhtymä, Karisto.

Source: The Finnish Book Publishers' Association.

7.8 Number and market share* of general-interest publishers and specialized publishers in 1981, 1986, 1991 and 1992

	General-interest publishers		Specialized publishers		Total	
	No.	Market share %	No.	Market share %	No.	Market share %
1981	7	84.7	37	15.3	44	100.0
1986	7	80.0	49	20.0	56	100.0
1991	7	72.4	55	27.6	62	100.0
1992	7	69.8	53	30.2	60	100.0

* Share of the value of sales by FBPA members.

Source: The Finnish Book Publishers' Association.

7.9 Marketing channels of books published in Finland 1980 – 1991*

Marketing channel	Net sales**							
	1980	1985	1986	1987	1988	1989	1990	1991
	%							
Bookshops	44.8	49.3	45.9	39.4	38.1	47.3	36.4	37.5
Kirjavälitys (wholesale dealer)	7.1	9.8	10.4	11.5	14.0	13.2	10.0	10.5
Other wholesale dealers	7.7	3.2	7.5	7.3	8.1	2.5	4.4	4.0
Hire purchase	22.6	15.5	14.3	15.1	14.2	14.1	16.8	16.3
Other channels***	17.8	22.2	21.8	26.7	25.7	22.9	32.3	31.7
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
FIM thousand	506 200	781 400	815 095	919 274	938 578	927 554	1 200 049	1 229 364

* The figures for different years are not fully comparable as the number of respondents has varied from year to year. In 1992 *responses came in from 59 out of the 60 members.*

** Gross value of book sales of FBPA members less the commission paid to booksellers. The commission varies between different types of books: for schoolbooks for primary school it is 6 %, for other textbooks 25 %, and for other literature 20–42 %.

*** In 1991 the principal other channels, in order of importance, were as follows: direct sales to consumers, sales to local authorities, other retail sale, sales to book clubs, sales to library services, and overseas sales. NB: A substantial part of sales through book clubs is not included in the figures reported by FBPA members.

Source: The Finnish Book Publishers' Association.

7.10 Number of bookshops, Rautakirja kiosks and second-hand bookshops 1980 – 1991

Year	Bookshops*	Rautakirja kiosks	Second-hand bookshops
1980	474	622	161
1982	468	694	153
1984	504	796	165
1986	481	840	189
1988	484	823	215
1989	478	844	210
1990	483	850	229
1991	462	825	218

* In addition many major department stores have book departments. The number and size of these may vary considerably.

Sources: Rautakirja Oy; Statistic Finland Business Register.

7.11 Book clubs 1991

Book club	Est.	Main shareholders	Members	Turnover FIM million
Suuri Suomalainen Kirjakerho	1969	WSOY 40 %, Otava 40 %, Yhtyneet Kuvalehdet 20 %	189 500	77.7
Uudet Kirjat	1980	WSOY	85 800	31.7
Kirjamaailma	1990	WSOY	29 500	12.0
Johanna	1971	Gummerus	50 000	16.0
Lasten Parhaat Kirjat	1987	Nordisk Bok 50 %, Weilin + Göös 50 %	36 000*	..
Lasten Oma Kirjakerho	1975	Sanoma Group	45 000*	..

* Data for 1990.

Sources: Reports of book clubs.

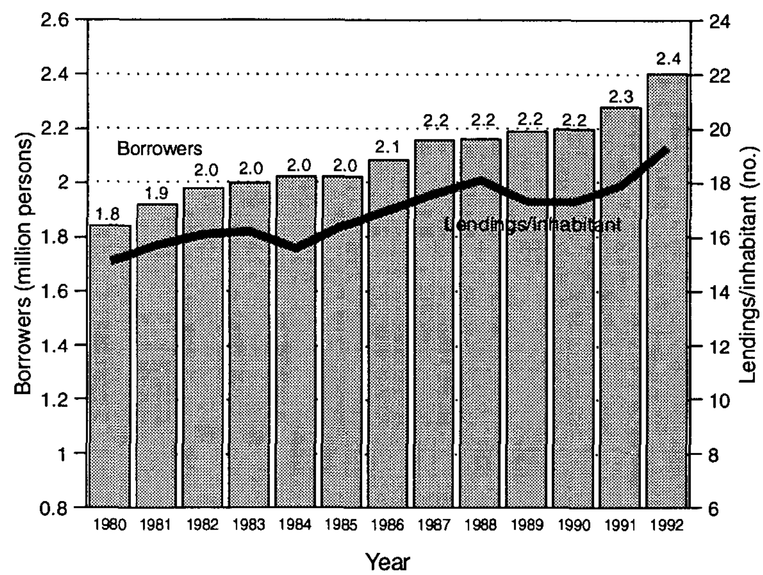
7.12 Main libraries, branch libraries, institutional libraries and mobile libraries 1980 – 1992

Year	Main libraries	Branch libraries	Institutional libraries	Total	Mobile libraries
1980	464	1 144		1 608	219
1981	461	1 133		1 594	223
1982	461	1 119		1 580	223
1983	461	1 097		1 558	230
1984	461	1 125		1 586	230
1985	461	1 083		1 544	234
1986	461	877	205	1 543	234
1987	461	623	205	1 289	235
1988	461	563	204	1 228	233
1989	460	535	203	1 198	231
1990*	444	510	197	1 151	232
1991	444	486	195	1 125	234
1992	444	469	194	1 107	232

* The province of Åland not included in the statistics from 1990 onwards.

Source: National Board of General Education/Ministry of Education.

Figure 7.5
Library borrowers and lendings 1980 – 1992



Source: Table 7.13

7.13 Number of library borrowers, lendings and library book collections 1980 – 1992

Year	No. of borrowers		Lendings*			Volumes	
	'000 persons	% of the population	'000**	Per inhabitant	Per borrower	'000	Per inhabitant
1980	1 842	38.5	72 513	15.1	39.4	23 350	4.9
1981	1 919	39.9	75 352	15.7	39.3	24 881	5.2
1982	1 978	40.9	78 008	16.1	39.4	26 412	5.5
1983	1 999	41.0	78 730	16.2	39.4	27 674	5.7
1984	2 023	41.3	76 545	15.6	37.8	28 917	5.9
1985	2 021	41.2	80 335	16.4	39.8	30 469	6.2
1986	2 084	42.3	83 577	17.0	40.1	30 330	6.2
1987	2 160	43.7	86 985	17.6	40.3	33 004	6.7
1988	2 162	45.2	86 581	18.1	40.0	34 107	7.1
1989	2 191	44.1	85 989	17.3	39.2	34 902	7.0
1990	2 199	44.4	85 714	17.3	39.0	35 502	7.1
1991	2 281	45.9	89 240	17.9	39.1	35 938	7.2
1992	2 405	48.0	96 387	19.3	40.1	36 308	7.3

* The figures for 1984 and from 1990 onwards do not include the province of Åland.
** Includes lendings of audiovisual material.

Source: National Board of General Education/Ministry of Education.

7.14 Public library borrowers and book lendings 1985 – 1992*

Year	Borrowers	Adults	Children	Book lendings	Book lendings breakdown		
	'000 persons	as % of borrowers	as % of borrowers	'000	Adult non-fiction %	Adult fiction %	Children's books %
1985	2 021	73.0	27.0	77 914	20.6	37.3	42.1
1986	2 084	74.0	26.0	80 540	20.6	36.6	42.8
1987	2 160	74.0	26.0	80 067	19.7	35.9	44.4
1988	2 162	73.7	26.3	78 341	20.1	35.3	44.6
1989	2 191	73.9	26.1	76 405	21.1	34.5	44.4
1990	2 199	74.3	25.7	75 085	22.1	34.2	43.7
1991	2 281	75.6	24.4	76 023	23.5	34.8	41.7
1992	2 405	76.9	23.1	80 806	25.1	35.1	39.8

* Province of Åland not included.

Source: National Board of General Education/Ministry of Education.

7.15 Book reading 1981 – 1991

	Book reading during the previous 6 months								Total	Member of a book club
	Has read books	1–2 books	3–5 books	6–9 books	10–19 books	At least 20 books	Does not remember number	Has not read		
	%									
Age 10 years or over										
All total										
1981	76	12	17	10	16	18	1	24	100	13
1991	75	18	17	10	13	13	3	25	100	11
Men										
1981	74	15	18	9	16	14	1	26	100	10
1991	70	21	17	9	10	9	3	30	100	5
Women										
1981	77	10	17	11	16	22	0	22	100	15
1991	80	16	17	11	15	18	3	20	100	15
Age										
10–14 years										
1981	98	9	16	8	21	41	2	2	100	5
1991	90	17	21	13	19	19	1	10	100	7
15–24 years										
1981	89	10	17	12	22	27	0	11	100	11
1991	86	17	18	14	17	19	2	14	100	6
25–44 years										
1981	78	11	19	11	17	18	0	22	100	21
1991	80	17	18	12	15	14	2	20	100	16
45–64 years										
1981	65	14	19	10	12	9	–	35	100	11
1991	66	19	16	8	10	11	2	34	100	10
65– years										
1981	56	17	13	5	10	8	2	44	100	3
1991	61	21	15	6	7	8	6	39	100	4
Age 15 years or over										
Stage of life										
Unmarried, living at home with parents (age 10-30 years, no children)										
1981	87	11	16	12	21	26	0	13	100	7
1991	85	19	19	13	15	18	3	15	100	4
Other unmarried, divorced or widowed (no children under 18, age under 45)										
1981	82	8	20	7	17	30	–	18	100	19
1991	81	12	15	14	19	18	1	19	100	9

continued

7.15 continued

	Book reading during the previous 6 months								Total	Member of a book club
	Has read books	1–2 books	3–5 books	6–9 books	10–19 books	At least 20 books	Does not re-member number	Has not read		
	%									
Other unmarried, divorced or widowed (no children under 18, age 45+)										
1981	60	11	15	8	12	10	1	40	100	6
1991	60	16	13	7	9	11	5	40	100	6
Married or living together (no children under 18, age under 45)										
1981	74	8	14	12	19	19	–	26	100	17
1991	83	18	18	14	14	16	1	17	100	14
Married or living together (no children under 18, age 45+)										
1981	62	18	16	8	11	8	0	38	100	8
1991	64	23	16	7	8	9	3	36	100	8
Married or living together (youngest child 0–6 yrs)										
1981	80	12	20	11	20	16	0	20	100	24
1991	80	19	17	11	16	12	3	20	100	19
Married or living together (youngest child 7–17 yrs)										
1981	74	15	21	12	12	13	–	26	100	19
1991	74	18	19	11	13	11	3	26	100	14
Single parent (children under 18)										
1981	77	8	21	8	15	23	–	23	100	19
1991	85	10	27	8	16	18	4	15	100	24
Place of residence										
Urban										
1981	78	11	18	12	18	18	0	22	100	16
1991	77	18	18	11	13	15	2	23	100	12
Non-urban										
1981	67	14	17	8	12	14	1	33	100	10
1991	68	19	15	9	11	10	4	32	100	9

Source: Statistics Finland 1991 leisure survey.

7.16 Use of library services 1981 – 1991

	Has been to the library during the past 6 months	Has not been to the library during the past 6 months	Total
	%		
Age 10 years or over			
All total			
1981	53	46	100
1991	59	41	100
Men			
1981	50	49	100
1991	55	45	100
Women			
1981	56	43	100
1991	62	38	100
Age			
10–14 years			
1981	88	11	100
1991	94	6	100
15–24 years			
1981	75	24	100
1991	82	18	100
25–44 years			
1981	56	43	100
1991	65	35	100
45–64 years			
1981	34	64	100
1991	45	55	100
65– years			
1981	22	78	100
1991	28	72	100
Age 15 years or over			
Stage of life			
Unmarried, living at home with parents (age 10-30 years, no children)			
1981	74	25	100
1991	80	20	100
Other unmarried, divorced or widowed (no children under 18, age under 45)			
1981	66	34	100
1991	70	30	100
Other unmarried, divorced or widowed (no children under 18, age 45+)			
1981	28	71	100
1991	33	67	100
Married or living together (no children under 18, age under 45)			
1981	56	44	100
1991	70	30	100
Married or living together (no children under 18, age 45+)			
1981	29	69	100
1991	37	63	100
Married or living together (youngest child 0–6 yrs)			
1981	58	41	100
1991	67	33	100
Married or living together (youngest child 7-17 yrs)			
1981	46	52	100
1991	58	42	100
Single parent (children under 18)			
1981	55	45	100
1991	69	31	100
Place of residence			
Urban			
1981	55	44	100
1991	59	41	100
Non-urban			
1981	42	57	100
1991	51	49	100

Source: Statistics Finland 1991 leisure survey.

8 Newspapers

Finland has a strong newspaper sector: the number of newspaper titles, circulation figures and coverages are all at a very high level. The circulation of Finnish newspapers ranks among the highest in the world. Calculated per 1,000 population, the circulation of Finnish dailies, for example, is fourth only to Norway, Japan and Sweden. Newspapers and local papers represent approximately one third of the total turnover of the mass media in Finland and over half of advertising through the mass media.

In 1993, a total of 227 memeber newspapers of the Finnish Newspaper Publishers' Association FNPA were published. Following international practice, newspapers are nowadays classified into two categories, viz. dailies and other newspapers. This distinction is based on the frequency of publication. (Tables 8.1 and 8.2.)

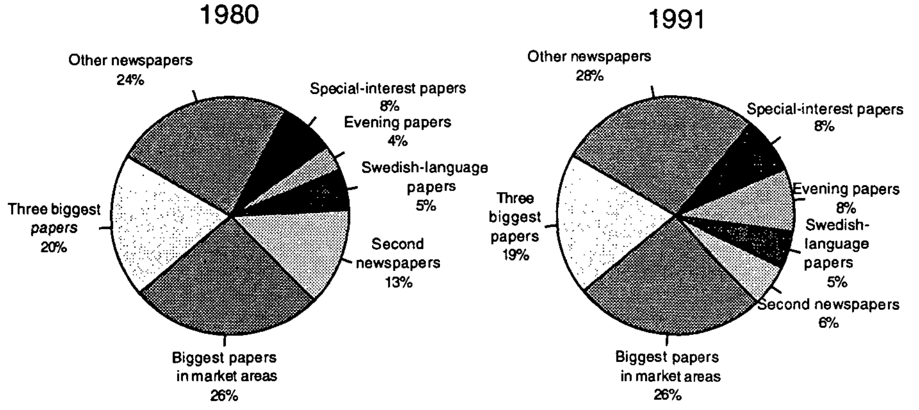
In 1992, the number of dailies appearing 4–7 times a week published in Finland was 56, with an average circulation of 46 000 copies. Dailies are typically the biggest papers in the region where they are published. Afternoon and evening papers are also classified as dailies, as are certain specialized newspapers and some of the smaller newspapers in towns with at least two newspapers.

Other newspapers appear 1–3 times a week. The number of titles published in this category is very high, but in terms of circulation they tend to be rather small. In 1993 there were 171 FNPA memeber newspapers in this category, with an average circulation of around 7 500 copies. The biggest single subcategory in this group is represented by so-called local papers, which cover a small circulation area and which concentrate on local news. Other papers in this category include some of the 'second newspapers', i.e. smaller papers in towns with two newspapers or more, as well as a couple of specialized newspapers.

The relative shares of dailies and other newspapers on the market have remained rather unchanged since the early 1980s. The proportion of dailies out of all newspaper titles has been around one quarter, but in terms of circulation they very much dominate the field: in 1993, their combined circulation accounted for over two thirds or 68 per cent of the total newspaper circulation. Dailies appearing seven times a week alone accounted for almost half (46 %) of the total circulation of newspapers.

Another common distinction in the newspaper sector is based on competitive position. An analysis from this vantage-point indicates that there have

Figure 8.1
Circulation of newspapers by competitive position in 1980 and 1991



Source: Table 8.3

been two clear changes in the structure of the Finnish press compared with the early 1980s. (Figure 8.1 and Table 8.3.)

One of these changes is the decline of the category of 'second' newspapers, where circulations as well as the number of titles have dropped. The biggest single case was the discontinuation in 1991 of Uusi Suomi, the Helsinki-based national newspaper with long traditions (est. 1847), which reduced the total circulation of second newspapers by almost one quarter. All in all the circulation share of all second papers has declined to less than half the level of the early 1980s.

The other significant change has been the marked increase in the market share of afternoon papers. The competition between Ilta-Sanomat and Iltalehti (which was launched in 1980) has served to increase the circulations of both papers. Their total circulation has nearly tripled, and their share of the circulation of all newspapers has more than doubled.

Afternoon papers are sold on a single-copy basis. Nowadays about 95 per cent of the single-copy sales of Finnish newspapers is represented by the sale of afternoon papers. The 2.5-fold increase in the number of single copies sold is due completely to the increase in the sale of afternoon papers.

Single-copy sales of other newspapers (both Finnish and foreign) is at a relatively low level in Finland. (Table 8.11.)

The ongoing economic recession is also reflected in the circulation of newspapers. During the 1980s the total circulation of Finnish newspapers increased from 3.4 million to 4.1 million. Then, the figures started to drop - apparently for the first time since the Second World War. During the past four years the total circulation of all newspapers (FNPA member papers plus other newspapers) has declined by nearly ten percent from the peak figures that were recorded around the turn of the decade. Newspapers have been closed down, and many have seen their circulations decrease. In addition, a couple of specialized newspapers have become weeklies and are now classified under the periodical press.

During the 1980s many newspapers started to appear more frequently than previously. Now, during the early 1990s, this trend has been reversed. In 1991/92, a dozen or so newspapers decided to cut the number of weekly issues.

In spite of several takeovers and mergers in the press during the 1980s and early 1990s, the ownership of Finnish newspapers is by no means heavily concentrated. For instance, the combined circulation of the four biggest newspaper publishers in Finland is smaller than in the other Scandinavian countries.

Looking at the development of the circulation of the top one, four and eight newspaper publishers from the mid-1980s to the 1990s, we find that the changes have been rather small. The biggest changes occurred during the period between 1986 and 1988. The biggest single change (5 percentage points) occurred in the share of the top four publishers in 1986–1988. The changes in the circulation shares from 1988 to 1992 have been rather insignificant. (Figure 8.3.)

In recent years there has been much discussion about the shareholdings of newspapers in local radio and television. However, it seems that the involvement of newspaper companies in different sectors of the print media is more common than in the electronic media. (Table 8.6.)

In terms of economic volume, dailies are still the most significant force in the Finnish mass media, even though the economic recession that hit the country in the early 1990s has reduced their advertising revenue. In 1992, the turnover of Finnish dailies amounted to approximately FIM 3.9 billion, accounting for about one quarter or 26 per cent of the turnover of the mass media in general. Dailies accounted for over half (52 %) of total advertising in the mass media.

In 1991 advertising revenues accounted for two thirds or 64 per cent of the total revenue of newspapers. (Figure 8.4.) The economic recession has had adverse effects on advertising revenues. During the more prosperous years of the late 1980s, three quarters of the profits of the Association member newspapers came from advertising.

The biggest single expense item for dailies in 1992 was technical production (34 %). Editorial work accounted for roughly one quarter of the expenses. (Figure 8.5.)

In 1992 editorial material took up just under three quarters of total registered space in Finnish newspapers; the remaining one quarter was taken up by advertising material. The three major categories of editorial material in 1992 were domestic material (34 %), sport (15 %) and entertainment (10 %). (Table 8.7.)

The number and economic volume of free sheets increased sharply during the early 1980s, but growth slowed down after the mid-1980s. In 1989 a total of 141 free sheets were published in Finland, with a total print of 3.7 million copies. More recent figures on total volumes in the free sheet business are not available. (Table 8.12.)

Statistical sources

Circulation statistics for newspapers and the volume data calculated from these statistics are based on the statistics compiled by The Finnish Audit Bureau of Circulations.

The Finnish Newspaper Publishers' Association compiles annual statistics on various aspects of its member papers' operations: economy, technology, and editorial issues. The Association publishes annually a special issue of its Suomen Lehdistö journal that contains statistics on the Finnish print press.

The Association of Local Newspapers publishes annually collected media data on its member papers.

The annual statistics compiled by Posts and Telecommunications contain data on the number of newspapers delivered by the Post Office. The Annual Reports of Rautakirja Oy contain statistics on the single-copy sales of Finnish and foreign newspapers.

8.1 Number of newspaper titles 1980 – 1993

Year	Dailies (7–4 times a week)	Non-dailies (3–1 times a week)	Total
1980	61	186	247
1985	65	164	229
1986	64	171	235
1987	67	172	239
1988	67	178	245
1989	66	176	242
1990	66	186	252
1991	61	180	241
1992	58	184	242
1993*	56	171	227

* In 1993: FNPA members only.

Sources: Annual reports of The Finnish Newspaper Publishers' Association FNPA 1980-; The Finnish Audit Bureau of Circulations.

8.2 Total circulation of newspapers 1980–1993

	Dailies (7–4 times a week)	Non-dailies (3–1 times a week)	Circulation total
1980			
circulation (thousand)	2 365	994	3 359
%	70.4	29.6	100.0
1985			
circulation (thousand)	2 662	1 178	3 840
%	69.4	30.7	100.0
1986			
circulation (thousand)	2 664	1 195	3 859
%	69.0	30.9	100.0
1987			
circulation (thousand)	2 719	1 260	3 979
%	68.3	31.6	100.0
1988			
circulation (thousand)	2 719	1 334	4 053
%	67.1	32.9	100.0
1989			
circulation (thousand)	2 744	1 346	4 090
%	67.0	33.0	100.0
1990			
circulation (thousand)	2 780	1 300	4 080
%	68.2	31.9	100.0
1991			
circulation (thousand)	2 670	1 351	4 021
%	66.4	33.6	100.0
1992			
circulation (thousand)	2 568	1 300	3 868
%	66.4	33.6	100.0
1993*			
circulation (thousand)	2 484	1 143	3 627
%	68.5	31.5	100.0

* In 1993: FNPA members only.

Sources: The Finnish Audit Bureau of Circulations; Annual reports of The Finnish Newspaper Publishers' Association 1980-.

8.3 Total circulation of newspapers by competitive position in 1980, 1985 and 1991

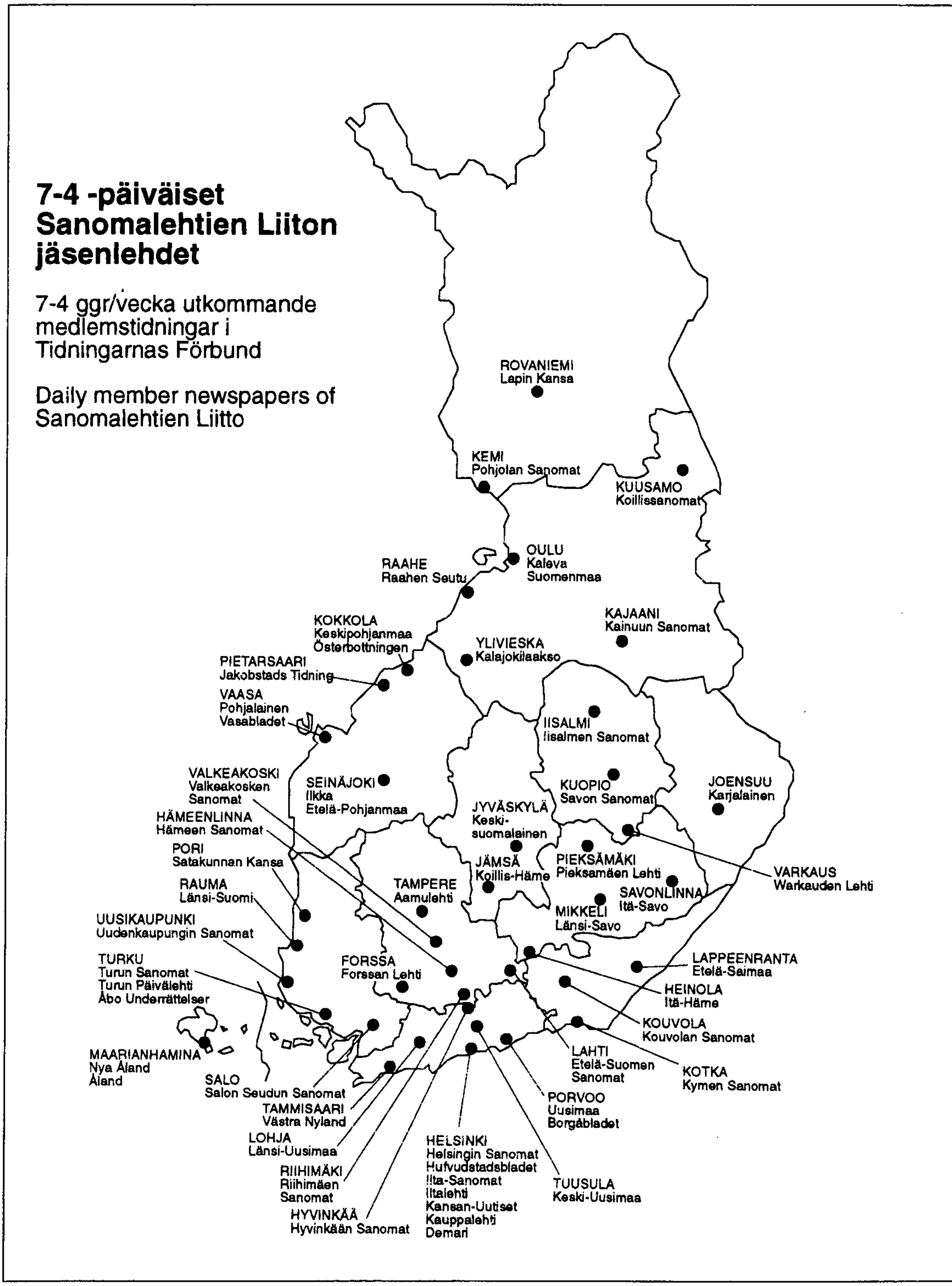
	1980	1985	1991
	%		
Three biggest papers*	19.5	18.3	19.2
Biggest papers in market areas	26.3	24.9	26.2
Second newspapers**	13.4	10.9	5.8
Swedish-language papers***	5.4	5.2	5.0
Evening papers	3.6	6.8	8.4
Special-interest papers	7.5	8.2	7.8
Other newspapers	24.3	25.8	27.6
Total	100.0	100.0	100.0
Circulation (thousand copies)	3 359	3 840	4 021

* Helsingin Sanomat, Aamulehti, Turun Sanomat
** Smaller papers in towns with at least two newspapers.
*** Swedish-language papers have not been included in other categories

Source: Sauri 1993.

Circulation data: The Finnish Audit Bureau of Circulations; The Finnish Newspaper Publishers' Association.

Figure 8.2
Dailies by place of publication



8.4 Dailies: frequency of publication, political affiliation, circulation, change in circulation 1991/92, volume and turnover in 1992

Newspaper	Issues/week	Political affiliation	1992 circulation	Change in circulation 1991/1992* %	Volume 1992	Turnover 1992 FIM thousand
Aamulehti	7	Independent	140 236	–3.0	49 924 016	276 000
Borgåbladet	6	Independent	10 727	–3.3	3 239 554	12 880
Demari	5	SDP	37 584	4.4	9 396 000	22 300
Etelä-Pohjanmaa	5	Independent	11 754	–1.4	2 962 008	8 400
Etelä-Saimaa	7	Centre	35 032	–2.7	12 366 296	61 355
Etelä-Suomen Sanomat	7	Independent	69 464	–2.5	24 590 256	120 288
Forssan Lehti	6	Independent	15 971	–1.8	4 807 271	25 718
Helsingin Sanomat	7	Independent	483 052	0.0	171 966 512	953 223
Hufvudstadsbladet	7	Independent	63 649	–3.2	22 468 097	75 900
Hyvinkään Sanomat	6	Independent	14 054	–6.5	4 286 470	8 468
Hämeen Sanomat	7	Independent	32 129	–3.6	11 373 666	60 288
Iisalmen Sanomat	7	Centre	19 986	–0.2	7 035 072	23 261
Ilkka	7	Centre	56 480	–1.8	19 937 440	65 262
Ilta-Sanomat	6	Independent	208 405	–4.7	62 729 905	212 329
Iltalehti	6	Independent	116 036	2.2	34 926 836	150 841
Itä-Häme	4	Independent	14 440	–2.3	3 003 520	13 635
Itä-Savo	7	Centre	24 025	0.1	8 432 775	29 800
Jakobstads Tidning	6	Independent	12 258	1.1	3 689 658	18 884
Kainuun Sanomat	7	Centre	30 034	–1.2	10 602 002	42 958
Kalajokilaakso	5	Independent	8 622	0.0	2 172 744	12 500
Kaleva	7	Independent	97 149	0.2	34 293 597	126 116
Karjalainen	7	Conservative	55 693	–1.6	19 771 015	73 900
Kauppalehti	5	Independent	82 349	–2.0	20 751 948	148 515
Keski-Uusimaa	7	Independent	24 120	–2.4	8 490 240	29 000
Keskipohjanmaa	7	Centre	35 247	0.4	12 371 697	42 700
Keskisuomalainen	7	Independent	82 080	0.3	29 220 480	123 700
Koillis-Häme	4	Independent	8 583	–9.2	1 664 883	10 200
Koillissanomat	5	Independent	10 434	–2.5	2 691 972	12 062
Kouvolan Sanomat	7	Independent	34 201	–0.6	12 141 355	51 048
Kymen Sanomat	7	Independent	32 268	–5.2	11 326 068	50 900
Lalli	4	Centre	6 717		1 383 702	5 238
Lapin Kansa	7	Independent	42 344	–3.2	14 947 432	60 000
Liitto	5	Centre	7 615		1 911 365	8 174
Länsi Savo	7	Independent	29 554	0.9	10 373 454	48 720
Länsi-Suomi	7	Independent	19 057	–5.3	6 727 121	18 902
Länsi-Uusimaa	6	Independent	14 088	0.3	4 296 840	19 825

8.4 continued

Newspaper	Issues/week	Political affiliation	1992 circulation	Change in circulation 1991/1992* %	Volume 1992	Turnover 1992 FIM thousand
Nya Åland	4	Independent	8 137	–0.9	1 253 098	9 469
Pieksämäen Lehti	5	Independent	9 013		2 271 276	6 868
Pohjalainen	7	Independent	64 350	–1.0	22 651 200	58 670
Pohjolan Sanomat	7	Centre	42 105	–1.1	14 863 065	53 428
Pyhäjokiseutu	4	Independent	9 415	–3.4	1 883 000	9 017
Raahen Seutu	4	Independent	8 627	–8.6	1 751 281	6 703
Riihimäen Sanomat	6	Independent	13 034	–3.3	3 936 268	11 409
Salon Seudun Sanomat	7	Independent	21 506	–1.2	7 591 618	31 417
Satakunnan Kansa	7	Independent	61 313	–2.1	21 704 802	92 800
Savon Sanomat	7	Independent	83 061	–8.3	29 320 533	127 426
Turun Päivälehti	5	SDP	9 370		2 305 020	5 113
Turun Sanomat	7	Independent	127 850	–5.1	32 729 600	267 294
Uudenkaupungin Sanomat	4	Independent	8 242	–3.6	1 648 400	7 200
Uusimaa	6	Independent	14 087	–2.8	4 268 361	14 700
Valkeakosken Sanomat	5	Independent	8 493		2 148 729	10 000
Vasabladet	6	Independent	27 353	–0.5	8 233 253	41 700
Västra Nyland	6	Independent	12 205	–1.6	3 673 705	13 323
Warkauden Lehti	6	Independent	13 471	–13.8	4 041 300	15 728
Ylä-Vuoksi	6	Independent	15 416	12.7	4 640 216	18 058
Åbo Underrättelser	5	Independent	8 034	1.0	2 024 568	6 300
Åland	5	Independent	11 384	–1.0	2 868 768	15 900
Österbottningen	6	Independent	5 715		1 714 500	9 500
Total			2 567 318		839 795 828	3 855 313

* Figure not given if no audit carried out in 1992.

Sources: The Finnish Audit Bureau of Circulations; Suomen Lehdistö 7–8/1993.

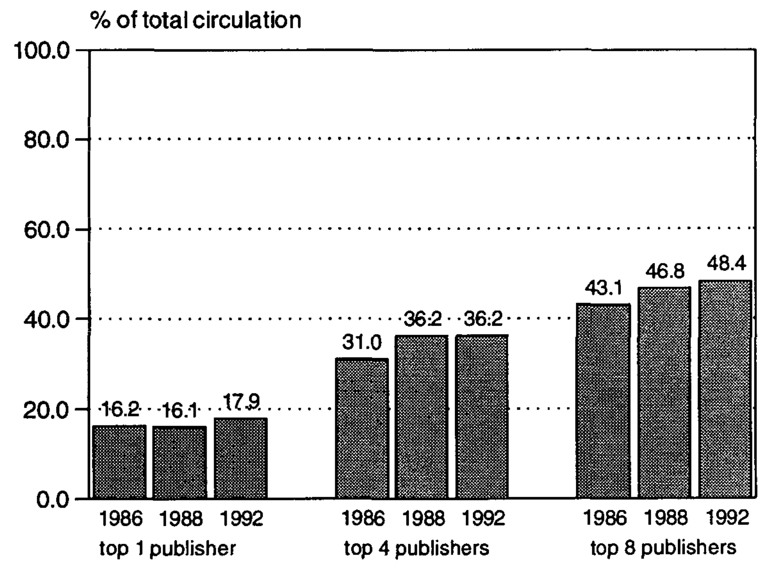
8.5 Newspapers appearing in different provinces in 1992*

Province	Dailies	Other newspapers	Total
Häme	6	26	32
Central Finland	2	14	16
Kuopio	3	12	15
Kymi	4	11	15
Lapland	2	2	4
Mikkeli	4	11	15
Oulu	7	18	25
North Karelia	1	9	10
Turku and Pori	8	29	37
Uusimaa	12	17	29
Vaasa	7	21	28
Åland	2	–	2
Total	58	170	228

* Table covers members of the Finnish Newspaper Publishers' Association. In 1992 the total number of newspapers published was 242; cf. Table 8.1.

Sources: Suomen Lehdistö 7–8/1993.

Figure 8.3
Major newspaper publishers' share of total circulation in 1986, 1988 and 1992*



*Circulation data for 1991

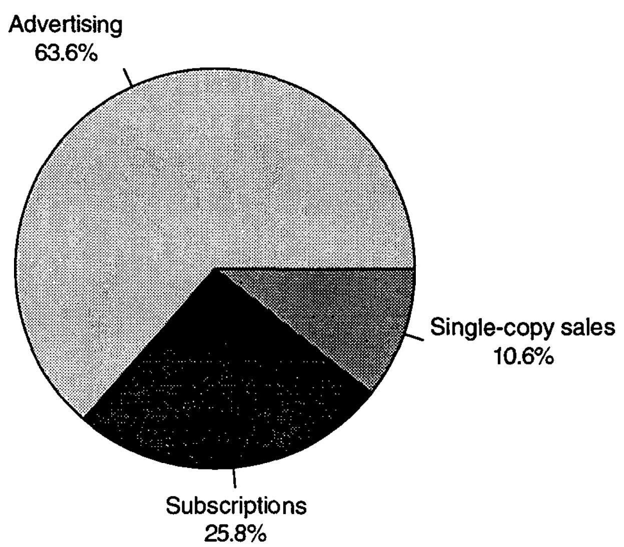
Source: Tuomo Sauri: Joukkoviestinnän rakenteita 1980-luvulta 1990 luvulle. Statistics Finland, Helsinki 1993.

8.6 Media holdings of 20 biggest newspaper publishers in 1991

Number of companies publishing/ engaged in	
– local newspapers	14
– magazines/periodicals	6
– free sheets	10
– book publishing	4
– local radio	9
– cable television	8

Source: Annual reports of newspaper companies.

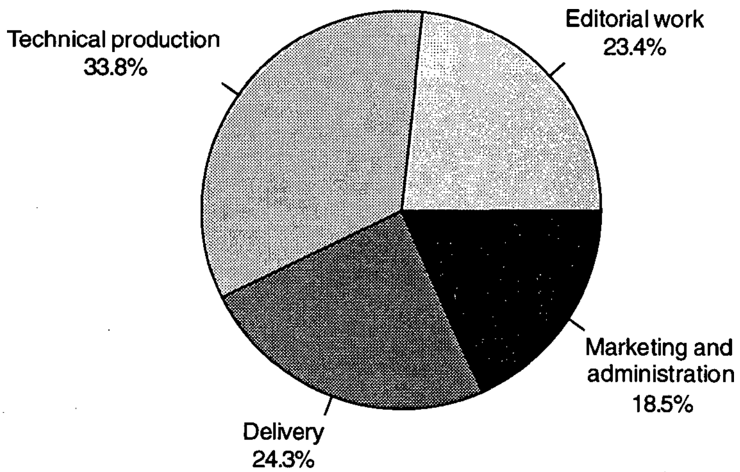
Figure 8.4
Breakdown of newspaper revenues in 1991*



*Calculated from total incomes of FNPA members.

Source: The Finnish Newspaper Publisher's Assocation.

Figure 8.5
Breakdown of newspapers' costs in 1992



*Calculated on the basis of data of cost structures provided by dailies.
In 1992 a total of 44 newspapers provided data for the statistics.
Source: The Finnish Newspaper Publishers' Association.

8.7 Contents of dailies in 1992*

	% of space
Editorial material	
Articles	5.7
Culture	6.8
Home news	33.9
International news	6.7
Economy	8.0
Sports	14.8
Entertainment	10.4
Letters to the Editor	2.6
Cartoons	2.9
Radio & TV pages	8.3
Total	100.0
Breakdown of total registered space:**	
Editorial material	71.6
Advertisements	28.4
Total	100.0

* Based on a one-week sample of dailies. Breakdown of material calculated on the basis of total space. In 1992 a total of 44 newspapers provided data for the statistics.

** Total registered space is the combined space taken up by editorial material and advertisements. In addition, there remains "empty space" which is taken up by headings in the advertisement section as well as space left between stories, pictures and advertisements (in 1992 the figure for empty space was 3.7 %).

Source: The Finnish Newspaper Publishers' Association.

8.8 Sources of text material in dailies in 1992*

	% of text space
Produced by in-house staff	45.3
Produced by outside contributors	11.8
Material from news agencies/ purchased materials	32.0
Material submitted**	10.9
Total	100.0

* Based on a one-week sample of dailies. In 1992 a total of 44 newspapers provided data for the statistics.

** Includes unsolicited material such as letters to the Editor, press releases, Radio & TV programming and other material not produced by the paper's staff.

Source: The Finnish Newspaper Publishers' Association.

8.9 Newspapers delivered by the Post Office 1980 – 1993*

	Newspapers			Local papers	Total
	Total	With regular post	Special delivery**		
	Million copies	%	%	Million copies	Million copies
1980	349.0	77	23	52.6	401.6
1981	388.8	72	28	55.4	444.2
1982	385.0	71	29	59.3	444.3
1983	398.7	62	38	63.8	462.5
1984	399.0	61	39	65.0	464.0
1985	407.6	61	39	68.0	475.6
1986	393.2	63	37	67.3	460.5
1987	390.5	63	37	67.2	457.7
1988	395.2	62	38	67.2	462.4
1989	377.1	62	38	83.4	460.5
1990	382.7	61	39	85.3	468.0
1991	376.0	58	42	82.1	458.1
1992	334.1	..	..	83.9	418.0
1993	284.0	..	..	74.2	358.2

* To Finnish and overseas addresses.
** In the case of newspapers consists chiefly of early-morning deliveries.

Source: Posts and Telecommunications.

8.10 Finnish newspapers: methods of delivery in 1986, 1989 and 1991*

	1986	1989	1991
	%		
Delivery by newspaper	16	9	6
Joint delivery arrangement	48	53	59
Post Office, early morning	11	14	16
Post Office, regular post	25	24	19
Total	100	100	100
No. of papers responding	(48)	(45)	(56)

* Calculated on the basis of number of copies delivered. The data are based on questionnaire studies in which the number of papers responding varies from year to year. The breakdowns are affected by the number and size of newspapers taking part. The figures do not include single-copy sales, see Table 8.11.

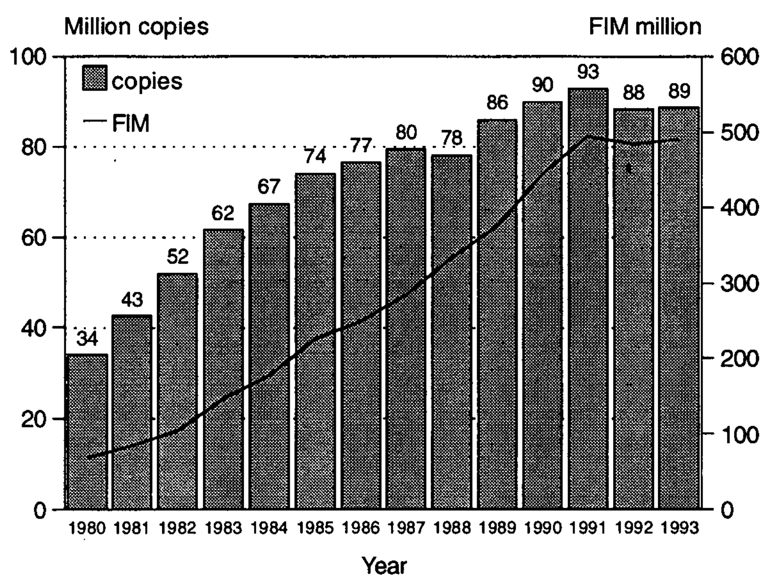
Source: The Finnish Newspaper Publishers' Association.

8.11 Single-copy sales of Finnish and foreign newspapers 1980–1993

	Finnish newspapers		Evening papers				Foreign newspapers	
	Million copies	FIM million	Million copies	%	FIM million	%	Million copies	FIM million
1980	40.4	84.7	34.0	84.2	68.1	80.4	1.1	4.0
1981	48.5	103.4	42.5	87.6	84.2	81.4	1.0	4.2
1982	58.3	124.4	52.0	89.2	104.1	83.7	1.1	5.0
1983	67.8	168.8	61.7	91.0	146.0	86.5	1.0	5.3
1984	73.1	198.7	67.4	92.2	176.7	88.9	0.9	4.5
1985	79.6	246.7	74.1	93.1	225.2	91.3	0.8	5.0
1986	82.4	273.1	76.6	93.0	248.5	91.0	0.9	5.5
1987	85.1	309.5	79.5	93.4	283.2	91.5	0.8	5.1
1988	84.3	360.6	78.2	92.8	333.8	92.6	0.8	6.1
1989	91.6	404.4	86.1	94.0	376.0	93.0	0.9	6.5
1990	95.3	474.1	90.0	94.4	444.0	93.7	0.8	6.3
1991	98.1	525.8	92.9	94.7	493.9	93.9	0.8	6.9
1992	93.0	514.1	88.4	95.1	483.9	94.1	0.8	7.7
1993	93.2	521.3	88.7	95.2	490.5	94.1	0.7	7.7

Source: Rautakirja Oy.

Figure 8.6
Single-copy sales of evening papers 1980 – 1993



Source: Table 8.11

8.12 Free sheets: number, total print, volume and revenue from advertising in 1984 and 1989

	1984	1989
Free sheets	131	141
Total print (million copies)	3.3	3.7
Volume (million copies)	185	230
Advertising revenue (FIM million)	215	315

* Free sheets refers here to papers which depend chiefly on the sale of advertising space but which also include editorial material. Free sheets are delivered regularly to all households in the region concerned at least twice a month.

Sources: Suomen Lehdistö 4/1985; Suomen Lehdistö 4/1990.

8.13 Reading newspapers and free sheets in 1991

	Reads regularly		
	Newspapers appearing 7–3 times a week	Newspapers appearing 2–1 times a week	Free sheets
	%		
Age 10 years or over			
All total	93	33	51
Men	93	32	52
Women	92	33	50
Age			
10–14 years	72	18	24
15–24 years	91	29	50
25–44 years	94	34	54
45–64 years	96	35	57
65– years	95	37	48
Age 15 years or over			
Stage of life			
Unmarried, living at home with parents (age 10–30 years, no children)	92	33	43
Other unmarried, divorced or widowed (no children under 18, age under 45)	89	24	50
Other unmarried, divorced or widowed (no children under 18, age 45+)	89	32	51
Married or living together (no children under 18, age under 45)	94	28	61
Married or living together (no children under 18, age 45+)	99	38	54
Married or living together (youngest child 0–6 yrs)	94	37	55
Married or living together (youngest child 7–17 yrs)	97	36	54
Single parent (children under 18)	91	28	57
Place of residence			
Urban	94	20	61
Non-urban	94	55	40

Source: Statistics Finland 1991 leisure survey.

9 Magazines and periodicals

A wide range of magazines and periodicals are published in Finland; the total number of titles is around 2 500. For inclusion in the Post Office index, a magazine or periodical must meet the following criteria:

- it shall appear regularly at least four times during the calendar year (the traditional definition as specified in the Freedom of the Press Act);
- it shall contain in each issue several articles or other editorial material;
- anyone shall be able to subscribe to the magazine or periodical, or it shall be delivered on a membership or customer basis to the receiver's address; and
- the contents shall not consist primarily of business announcements, price lists, or advertisements.

Some sources refer to the statistics of the University of Helsinki bibliographical department and on this basis put the total number of titles at around 4 500. This figure includes all periodicals that are published at least twice a year. (Table 9.1.)

The discussion that follows is based on the former, quarterly definition, which means it is concerned with some 2 500 magazines and periodicals. According to the classification that is now widely in use, magazines and periodicals are divided into the following four groups:

(1) Consumer magazines, which are further divided into the subgroups of general-interest and family magazines, women's magazines, men's magazines, children's magazines and special-interest and hobby magazines;

(2) Trade and business magazines, which are divided by subject area into 16 groups;

(3) Opinion journals, which are further divided by subject into society and politics, culture, religion and other ideological publications; and

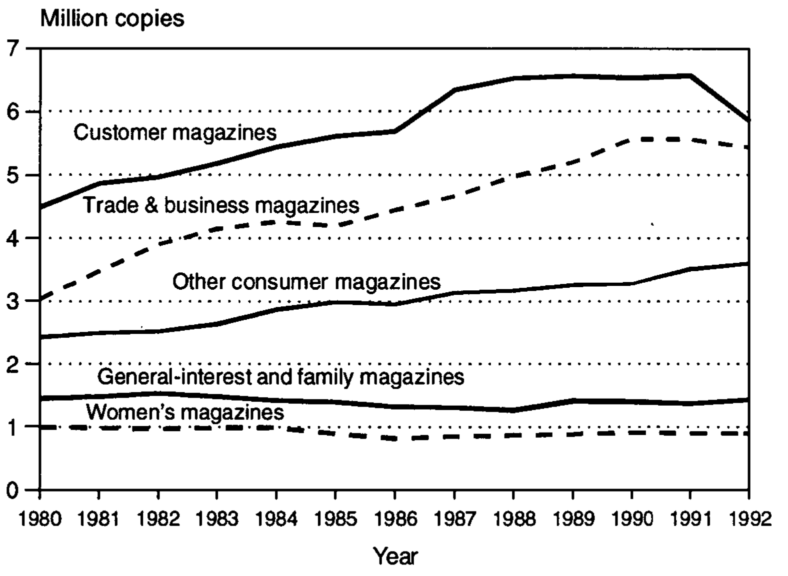
(4) Customer magazines; these are published and paid by large business enterprises, e.g. banks and insurance companies, and delivered to customers or the general public free of charge.

Since 1992 the Post Office has used this classification in compiling statistics on the magazines and periodicals it delivers (Table 9.6). Adding the number of single copies sold (Table 9.7) to those delivered by the Post Office, the breakdown of the total volume of magazines and periodicals (= circulation multiplied by number of issues per year) by category is as follows:

– Consumer magazines	37 %
– Trade & business magazines	41 %
– Opinion journals	3 %
– Customer magazines	19 %

Data on the volume of magazines delivered by the Post Office were classified by type of magazine for the first time in 1992. A picture of how the relative share of different magazine categories has changed since the early 1980s is provided by the time-series data compiled by The Finnish Audit Bureau of Circulations, but these data obviously include only those magazines that have commissioned an audit of their circulation. The number varies from year to year. It is also important to note that owing to different frequencies of publication, time-series based on volumes and circulations give somewhat different pictures of the development of different categories of magazines.

Figure 9.1
Total circulation of selected magazine categories 1980 – 1992



Source: Table 9.2

Among the various types of magazines listed, other consumer magazines or special-interest and hobby magazines as well as trade and business magazines have shown increased circulation numbers. In these categories the number of magazines that have commissioned an official audit of circulation has clearly increased, which goes some way towards explaining the marked growth in total circulations (although in 1992 the circulation of customer magazines declined substantially with the decision to discontinue one of the biggest customer magazines, the *Kauppa ja Koti* magazine). The general trend for women's magazines indicates a decline in total circulation. The total circulation of general-interest and family magazines tends to fluctuate according to the number of titles available on the market. (Table 9.2.)

Single-copy sales of domestic magazines has shown a declining trend since the beginning of the 1980s (Table 9.7). At the same time the sale of evening papers has sharply increased (cf. Table 11 in Chapter 8).

Single-copy sales of foreign magazines increased especially around the mid-1980s, but the trend then came to a standstill. Sales picked up in the early 1990s, but the trend was once again reversed in 1992. (Table 9.7.)

The bulk of foreign magazines sold in Finland are special-interest and hobby magazines. In 1992 general-interest and family magazines accounted for one fifth of the value of foreign magazine sales. (Table 9.9.)

The magazine business is the second largest sector of mass communication in Finland after dailies. In 1992 its turnover amounted to around FIM 2.7 billion, representing about 19 per cent of the total turnover of all mass media.

The main sources of income for magazines are subscriptions and single-copy sales. Advertising revenue has declined since the beginning of the recession. Today, advertising probably accounts for something like 20 per cent of total revenues in magazines. Detailed data on the breakdown of profits and costs in the magazine business are not available for the past few years. Before the recession set in, advertising revenue accounted for approximately 25 per cent of the profits of magazines.

Finland's biggest publishers all remain in domestic ownership. There are today three major magazine publishers in Finland: Yhtyneet Kuvalehdet, Helsinki Media/Sanoma Group and A-lehdet Oy.

Yhtyneet became by far the country's biggest magazine publisher with the takeover of Lehtimiehet Oy. Helsinki Media/Sanoma has also been strengthening its position. By contrast, the product range and volume of A-lehdet has remained more or less unchanged since the mid-1980s. (Table 9.4.)

At year-end 1991, these three biggest magazine publishers had a total of 58 consumer magazine titles, with a combined total volume of 102.5 million copies.

In 1991, these three publishers accounted for around 80 per cent of the total volume of consumer magazines and for over one quarter (28 %) of the total volume of all magazines and periodicals. These estimates are based on volume data published by the Post Office and Rautakirja Oy. (Tables 9.6 and 9.7.)

At the same time, however, many international publishers have been breaking into the Finnish magazine markets in the 1980's and early 1990's; in particular a number of major Scandinavian publishers (Aller, Bonnier, ICA) have now established a firm position in the marketplace. On the other hand, Finnish publishers have been taking steps towards internationalisation in various forms. Amongst the biggest names Helsinki Media/Sanoma Group and Yhtyneet Kuvalehdet have been involved.

Statistical sources

The net circulations of Finnish magazines are audited annually by The Finnish Audit Bureau of Circulations.

The Finnish Periodical Publishers' Association compiles statistics on the activities of its members and publishes annually a media handbook on the Association's magazines and periodicals. The handbook also contains some statistics on Finnish magazines in general.

The bibliographical department of the Helsinki University Library compiles statistics on the number of titles of periodicals published in Finland.

The annual statistics compiled by Posts and Telecommunications provide data on magazines and periodicals delivered by the Post Office. The Annual Reports of Rautakirja Oy contain statistics on the single-copy sales of domestic and foreign magazines.

Finally, the 1991 leisure study conducted by Statistics Finland contains detailed information on the reading of magazines and on how that has changed over time.

9.1 Number of magazines and periodicals by frequency of publication 1980 – 1992*

Years	Appears Once a week	1–2 times a month	4–11 times a year	2–3 times a year	2–11 times a year total	Total	Finnish-language	Finnish- and Swedish-language	Swedish-language	Other languages
1980	68	546	..	..	2 992	3 606	3 080	271	195	60
1981	85	583	..	..	3 265	3 933	3 291	309	244	89
1982	93	640	..	..	3 583	4 316	3 608	322	261	125
1983**	109	593	..	..	3 608	4 310	..	..	..	..
1984	115	517	..	..	3 800	4 432	3 817	285	233	97
1985	109	536	..	..	3 630	4 275	3 753	170	259	93
1986	97	566	..	..	3 889	4 552	3 940	243	267	102
1987	95	580	..	..	4 144	4 819	4 154	296	260	119
1988	88	507	..	..	4 065	4 660	4 174	202	188	96
1989	89	439	..	..	3 992	4 520	3 989	225	202	104
1990	87	453	..	..	3 556	4 096 ***	3 567	241	183	105
1991	103	492	2 812	1 283	4 095	4 690	4 046	213	165	266
1992	102	586	2 845	861	3 706	4 394	3 636	210	178	370

* Periodicals appearing at least twice a year.
** National newspapers appearing less than three times a week have been classified under magazines since 1983.
*** Additionally some 400 magazines for which data were not available on frequency of publication.

Source: Helsinki University Library, bibliographical department.

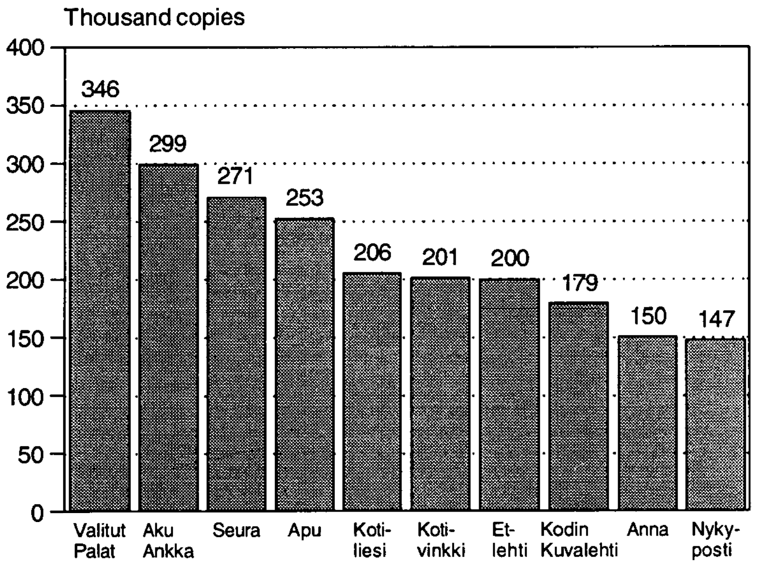
9.2 Total circulations of selected magazine and periodical categories 1980 – 1992*

	General-interest & family magazines**	Women's magazines***	Other consumer magazines	Consumer magazines total	Trade & business magazines	Customer magazines
	'000 copies					
1980	1 446.2	987.6	2 420.5	4 854.3	3 030.8	4 492.4
1981	1 481.2	978.8	2 483.4	4 943.4	3 472.0	4 846.8
1982	1 525.9	960.3	2 508.7	4 994.9	3 903.3	4 967.5
1983	1 475.6	980.4	2 626.7	5 082.7	4 145.0	5 191.2
1984	1 419.6	984.1	2 860.2	5 263.9	4 260.4	5 443.4
1985	1 392.5	884.8	2 975.1	5 252.4	4 190.2	5 616.4
1986	1 316.4	810.7	2 941.9	5 069.0	4 445.9	5 692.5
1987	1 306.7	842.8	3 121.8	5 271.3	4 668.3	6 348.5
1988	1 263.7	861.3	3 157.4	5 282.4	4 981.2	6 529.3
1989	1 410.9	881.4	3 249.6	5 541.9	5 203.8	6 569.8
1990	1 396.3	902.9	3 266.6	5 565.8	5 567.8	6 537.3
1991	1 364.6	893.3	3 507.1	5 765.0	5 564.4	6 574.3
1992	1 429.9	893.9	3 599.1	5 922.9	5 434.6	5 856.5 ****

* Magazines and periodicals that have audited their circulation. NB: The number of magazines and periodicals varies from year to year.
** Apu, Hymy, Kuriren, Nykyposti, SE! (1989-), Seura, Suomen Kuvalehti, Valitut Palat, 7 päivää (1992-)
*** Anna, Eeva, Gloria (1987-), Jaana (-1984), Kaks' Plus, Kauneus ja Terveys, Kotiliesi, Me Naiset, Muoti+Kauneus, Prima(1983-1985), Trendi, (1990-), Uusi Nainen.
**** The substantial decrease in total circulation in 1992 is due in large part to the closedown of the *Kauppa ja Koti* magazine.

Sources: The Finnish Audit Bureau of Circulations; The Finnish Periodical Publishers' Association.

Figure 9.2
Circulations of the ten biggest general-interest, family, special-interest and hobby magazines in 1992



Source: Table 9.3

9.3 Frequencies of publication, circulations and publishers of the biggest magazines and periodicals 1992*

Magazine	Issues/year	Circulation 1992	Change 1991/92 %	Publisher
General-interest and family magazines				
Valitut Palat	12	345 866	–1.2	Oy Valitut Palat – Readers' Digest Ab
Seura	52	271 150	–1.2	Yhtyneet Kuvalehdet Oy
Apu	52	252 912	–0.7	A-lehdet Oy
Nykyposti	12	147 250	7.4	Yhtyneet Kuvalehdet Oy
Hymy	12	111 661	–15.3	Yhtyneet Kuvalehdet Oy
Suomen Kuvalehti	52	111 534	–1.6	Yhtyneet Kuvalehdet Oy
7 päivää	52	92 394		Aller Julkaisut Oy
SE!	12	76 681	–7.4	Sun Press Ky
Major special-interest and hobby magazines (circulation over 30 000)				
Kotiliesi	24	205 536	5.1	Yhtyneet Kuvalehdet Oy
Kotivinkki	12	201 391	0.3	Kustannus Oy Forma
ET-lehti	12	200 049	6.2	Helsinki Media/Sanoma group
Kodin Kuvalehti	24	178 773	–1.4	Helsinki Media/Sanoma group
Anna	52	150 247	–1.9	Yhtyneet Kuvalehdet Oy
Suuri Käsityölehti	12	122 314	6.6	Helsinki Media/Sanoma group
Tekniikan Maailma	20	111 828	–7.0	Yhtyneet Kuvalehdet Oy
Suomen Luonto	10	111 315		Finnish Association for Nature Protection
Eeva	12	99 049	–5.8	A-lehdet Oy
Me naiset	54	94 576	–5.1	Helsinki Media/Sanoma group
Suosikki	12	93 225	2.5	Yhtyneet Kuvalehdet Oy
Tuulilasi	12	89 385	–3.8	A-lehdet Oy
Veikkaaja	52	79 411	1.6	Oy Veikkaus Ab
Katso	52	70 496	–5.4	A-lehdet Oy
Voi hyvin	6	66 913	–9.4	A-lehdet Oy
Pellervo-lehti	20	64 540	–12.4	Pellervo-seura ry.
Kauneus ja terveys	12	63 161	–4.3	A-lehdet Oy
Kaks Plus	12	63 087	0.7	Yhtyneet Kuvalehdet Oy
Trendi	4	60 451	9.5	Kustannus Oy Forma
Kotilääkäri	12	58 722	8.0	Yhtyneet Kuvalehdet Oy
Tieteen Kuvalehti	12	58 242	–5.1	Bonnier Julkaisut Oy
Alibi	12	57 271	–8.5	Yhtyneet Kuvalehdet Oy
Talouselämä	43	54 001	–1.1	Oy Talentum Ab
Gloria	12	51 680	–3.6	Helsinki Media/Sanoma group
Avotakka	12	51 396	–6.1	A-lehdet Oy
Muoti+Kauneus	9	50 757	5.3	Yhtyneet Kuvalehdet Oy
Koululainen	12	47 590	–2.6	Yhtyneet Kuvalehdet Oy
Eläinmaailma	12	46 238	–6.6	Helsinki Media/Sanoma group
Koneviesti	22	45 974	–11.3	Viestilehdet Oy
Erä	12	44 434	8.0	Yhtyneet Kuvalehdet Oy
Hyvä Terveys	9	41 035	4.2	Helsinki Media/Sanoma group
Kunto Plus	12	40 009	–0.7	Bonnier Julkaisut Oy
Lasten Pyhäkoululehti	10	39 115	–10.0	The Evangelical Lutheran Sunday School Association
Meidän talo & Koti	12	38 147	–4.8	A-lehdet Oy
Tiede 2000	8	37 978	–10.5	Helsinki Media/Sanoma group
Vauhdin Maailma	12	36 996	6.7	Yhtyneet Kuvalehdet Oy

9.3 continued

Magazine	Issues/year	Circulation 1992	Change 1991/92 %	Publisher
Mikro Bitti	12	35 747	–9.1	Helsinki Media/Sanoma group
Metsästys ja kalastus	12	34 322	–0.4	Yhtyneet Kuvalehdet Oy
Vene	10	31 104	–4.6	Yhtyneet Kuvalehdet Oy
Regina	24	30 928	–14.4	Kolmiokirja Oy
V8-Magazine	8	30 112	–13.1	Veekasi Oy
Major comic magazines (circulation over 20 000)				
Aku Ankka	52	299 432	–2.4	Helsinki Media/Sanoma group
Roope-setä	12	51 888	–0.0	Helsinki Media/Sanoma group
Nalle Puh	12	37 304	–6.3	Helsinki Media/Sanoma group
Villivarsa	12	23 822	–4.9	Lehtimiehet Oy/Yhtyneet Kuvalehdet
Nalle Puh Puuhalehti	6	22 857	–10.5	Lehtimiehet Oy/Yhtyneet Kuvalehdet
Major trade & business magazines (circulation over 100 000)				
Kunta ja Me	24	228 246		Finnish Municipal Employees' Union
Akava	4	206 208		The Organization of Professional Associations in Finland
Kirkko ja kaupunki	48	182 075	2.3	Helsinki Evangelical Lutheran parishes
STTK-FTFC	11	165 802		The Confederation of Technical Employee Organizations in Finland
SPR	4	155 486		The Finnish Red Cross
Taloustaito	9	151 995	11.8	Verotieto Oy
Puntari-Pyndaren	21	127 515		The Union of Commercial Employees in Finland
Sotaveteraani	8	115 188		Finnish War Veterans
Sydän	7	110 281		The Heart Disease Association
Tekniikka & Talous	48	100 105	1.5	Talentum Oy
Major customer magazines (circulation over 100 000)				
Pirkka	12	1 655 725	–2.8	Kauppiaitten Kustannus Oy
Sähköviesti	4	1 351 912	–10.6	Suomen Sähkölaitosyhdistys ry
Kulta YV	12	619 182	–8.0	OP-Julkaisut Oy
Yhteishyvä	12	365 625	–13.9	SOK
Me	12	340 048	11.2	Viestintärengas Oy
Silver News	4	179 606	–10.7	OP-Julkaisut Oy
Hippo	6	173 551	–2.5	OP-Julkaisut Oy
Ykkösklubi	4	162 777	–14.9	SP-Palvelu Oy
Elanto	12	141 190		Oy Kaupparengas Ab

* Magazines and periodicals that have audited their circulation in 1991 and/or 1992. Change in circulation given for magazines with audit figures for both years.

Sources: The Finnish Audit Bureau of Circulations; The Finnish Periodical Publishers' Association.

9.4 Four biggest magazine publishers: mutual shares of volume in 1987, 1989 and 1991

Publisher	Volume 1987 Million copies	%	Volume 1989 Million copies	%	Volume 1991 Million copies	%
Yhtyneet Kuvalehdet Oy	36.4	35.4	48.2	45.5	45.8	44.7
Lehtimiehet Oy*	12.3	12.0	–	–	–	–
Sanoma Yhtymä	29.7	28.9	33.1	31.3	33.7	32.9
A-lehdet Oy	24.5	23.8	24.6	23.2	23.0	22.4
Total	102.9	100.0	105.9	100.0	102.5	100.0

* Lehtimiehet Oy was taken over by Yhtyneet Kuvalehdet at year-end 1988.

Source: The Finnish Audit Bureau of Circulations.

9.5 Magazines and periodicals delivered by the Post Office 1980 – 1993*

	Magazines	Unsubsidized magazines**
	Million copies	
1980	333.5	–
1981	345.7	–
1982	336.1	–
1983	345.7	–
1984	349.0	–
1985	339.8	–
1986	338.0	–
1987	336.1	–
1988	335.9	61.4
1989	323.5	71.0
1990	320.1	77.1
1991	313.1	65.3
1992	301.1	61.4
1993	305.2	65.3

* To Finnish and overseas addresses.
** Magazines not eligible for transport subsidies.

Source: Posts and Telecommunications.

9.6 Magazines and periodicals delivered by the Post Office by type of magazine 1993

	1993		Change 1992/93
	Million copies	%	%
General-interest and family magazines	41.2	12.1	
Women's magazines	21.2	6.2	
Men's magazines	0.7	0.2	
Children's and juvenile magazines	18.7	5.5	
Special-interest and hobby magazines	25.0	7.3	
Consumer magazines total	106.8	31.3	–1.2
Forestry & agriculture	8.5	2.5	
Industry, technology	19.1	5.6	
Architecture, building & construction	7.3	2.1	
Trade, services	5.7	1.7	
Computers & ADP	3.7	1.1	
Auto & transport	7.7	2.3	
Business economics	9.1	2.7	
Financing & insurance	1.0	0.3	
Marketing and communication	2.2	0.6	
Public administration	16.1	4.7	
Social welfare and health care	17.4	5.1	
Education	4.7	1.4	
Church & religion	27.8	8.2	
Entertainment, culture	10.1	3.0	
Sports	11.9	3.5	
Trade & business magazines total	152.2	44.7	+7.6
Society and politics	6.3	1.8	
Culture	0.2	0.1	
Religion	4.8	1.4	
Other opinion journals	1.5	0.4	
Opinion journals total	12.8	3.8	–3.0
Customer magazines	69.0	20.2	–7.5
Magazines and periodicals total	340.8	100.0	+1.0

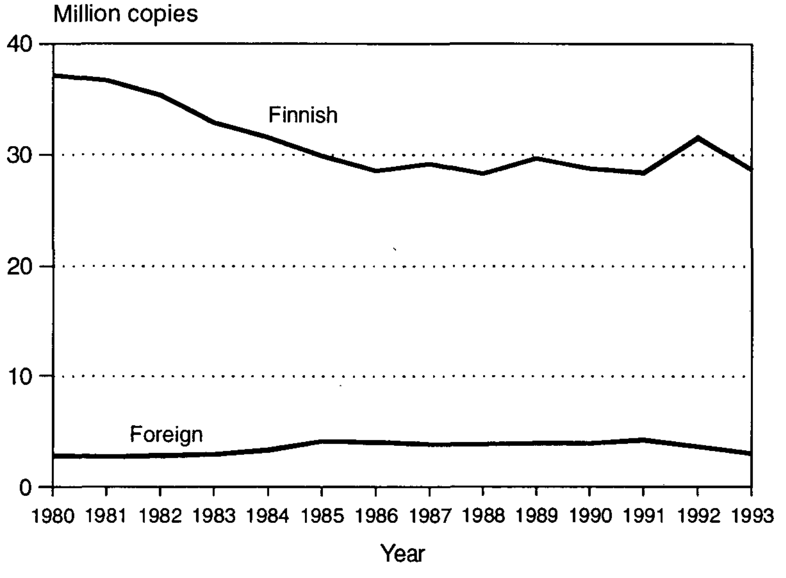
Source: Posts and Telecommunications.

9.7 Single-copy sales of Finnish and foreign magazines and periodicals 1980 – 1993

	Magazines					
	Finnish		Foreign		Total	
	Million copies	FIM million	Million copies	FIM million	Million copies	FIM million
1980	37.2	239.2	2.8	21.9	40.0	261.1
1981	36.7	276.9	2.7	23.9	39.4	300.8
1982	35.4	300.4	2.8	26.7	38.2	327.1
1983	32.9	319.8	2.9	30.0	35.8	349.8
1984	31.6	337.3	3.3	36.8	34.9	374.1
1985	29.9	345.0	4.1	49.4	34.0	394.4
1986	28.6	362.4	4.0	52.5	32.6	414.9
1987	29.2	378.1	3.8	55.5	33.0	433.6
1988	28.3	395.5	3.8	57.8	32.1	453.3
1989	29.7	437.2	3.9	65.3	33.6	502.5
1990	28.8	450.3	3.9	68.8	32.7	519.1
1991	28.4	453.9	4.2	77.7	32.6	531.6
1992	31.6	454.5	3.6	77.4	35.2	531.9
1993	28.7	427.9	3.0	73.6	31.7	501.5

Source: Rautakirja Oy.

Figure 9.3
Single-copy sales of magazines and periodicals 1980 – 1993



Source: Table 9.7

9.8 Single-copy sales of Finnish magazines and periodicals by type of magazine 1992

Type of magazine	Thousand copies	FIM million
General interest & family	7 296	103.5
Women's	4 532	68.5
Men's	696	21.5
Teenagers' and music	1 125	17.0
Fashion and needlework	364	9.6
Crossword puzzles	2 104	28.7
Beauty & health	558	14.4
Home improvement	193	5.2
Auto & boats	807	23.1
Photography & electronics	232	6.0
Comic books	2 315	25.1
Readers	886	13.9
Sports and betting	3 172	19.5
Other magazines	2 949	38.3
Albums	2 031	39.9
Calendars	89	3.0
One-off publications	21	1.7
Women's serials	366	8.7
Men's serials	22	0.5
Paperbacks	57	1.8
Serials, special offers	338	4.2
Other	1 437	0.5
Total	31 590	454.5

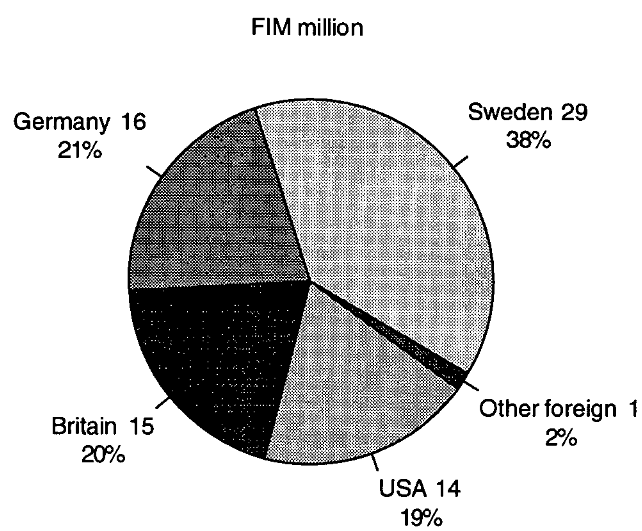
Source: Rautakirja Oy.

9.9 Single-copy sales of foreign magazines and periodicals by type of magazine 1992

Type of magazine	FIM million	%
General interest & family	16.4	21.3
Teenagers'	8.6	11.2
Fashion and needlework	10.4	13.5
Women's	8.7	11.3
Men's	5.9	7.7
Photography & electronics	7.7	10.0
Auto & boats	6.0	7.8
Comic books	4.2	5.4
Sports	2.8	3.6
Home improvement	2.3	3.0
Beauty & health	0.5	0.6
Crossword puzzles	0.4	0.5
Other	3.9	5.1
Total	77.1	100.0

Source: Rautakirja Oy.

Figure 9.4
Single-copy sales of foreign magazines and periodicals by country of origin in 1992



Source: Rautakirja Oy

9.10 Reading magazines and periodicals in 1981 and 1991

	Has read magazines				
	At least once a week	Once a month	Less often	Never or don't know	Total
	%				
Age 10 years or over					
All total					
1981	79	14	3	4	100
1991	69	28	1	1	100
Men					
1981	78	14	3	5	100
1991	67	29	1	0	100
Women					
1981	80	14	2	3	100
1991	70	27	1	1	100
Age					
10–14 years					
1981	77	12	3	7	100
1991	57	35	2	2	100
15–24 years					
1981	86	11	1	1	100
1991	73	25	0	0	100
25–44 years					
1981	78	19	2	1	100
1991	69	29	1	0	100
45–64 years					
1981	81	11	3	5	100
1991	71	27	1	0	100
65– years					
1981	73	10	3	13	100
1991	65	27	2	1	100
Age 15 years or over					
Stage of life					
Unmarried, living at home with parents (age 10-30 years, no children)					
1981	86	10	2	2	100
1991	73	26	0	0	100
Other unmarried, divorced or widowed (no children under 18, age under 45)					
1981	75	18	4	3	100
1991	71	26	2	–	100

9.10 continued

	Has read magazines				
	At least once a week	Once a month	Less often	Never or don't know	Total
	%				
Other unmarried, divorced or widowed (no children under 18, age 45+)					
1981	72	12	4	12	100
1991	63	28	2	4	100
Married or living together (no children under 18, age under 45)					
1981	79	20	1	1	100
1991	73	25	1	0	100
Married or living together (no children under 18, age 45+)					
1981	79	10	3	8	100
1991	72	26	0	0	100
Married or living together (youngest child 0–6 yrs)					
1981	79	18	2	0	100
1991	67	32	1	–	100
Married or living together (youngest child 7–17 yrs)					
1981	82	15	1	1	100
1991	71	28	1	–	100
Single parent (children under 18)					
1981	79	21	–	–	100
1991	66	31	3	–	100
Place of residence					
Urban					
1981	80	15	3	2	100
1991	71	26	1	0	100
Non-urban					
1981	79	13	3	6	100
1991	67	29	1	1	100

Source: Statistics Finland 1991 leisure survey.

10 Government subsidies for the mass media

Public support mechanisms are available for newspapers, magazines, periodicals, and literature; and in the electronic media for the cinema, video production, public-service broadcasting, and the production of sound recordings.

Government subsidies to the print press (direct support and indirect subsidy for transport and delivery) have decreased quite substantially in recent years. In 1993, cutbacks in subsidies reduced the level of public support by almost one half. (Table 10.1.)

The 1994 State Budget allocates FIM 111 million for direct support to the print press. The figure peaked in 1991 at FIM 158 million.

Direct support for the print media is provided in the following forms (see Table 10.1):

- government money to subsidize costs of transport, delivery, etc., to support development projects, and to support news agencies;

- party subsidies, which are granted to political parties represented in Parliament to support their organs on the basis of their relative strength, and to the County of Åland to support information and communication;

- support for joint delivery arrangements is granted to subsidize costs of such arrangements as well as to develop these systems;

- subsidies for opinion journals have been available since 1979 and subsidies for religious papers and journals since 1977.

The print media are also granted indirect subsidies for transport and delivery purposes. The 1994 State Budget allocates a total of FIM 98 million in indirect support (compensation to the postal service for reduced postage). This figure peaked at FIM 358 million in 1989, i.e. it was 3.5 times higher than today.

The indirect subsidies are paid to the Posts and Telecommunications Directorate. Up until 1990 the Post Office maintained a register on the amounts of transport subsidies paid out to individual newspapers. As from the beginning of 1991 these subsidies were changed into a single payment made to the Posts and Telecommunications Directorate for the maintenance of the newspaper delivery system, for guaranteeing newspaper deliveries to rural areas, and for keeping postage at a lower level for the print media.

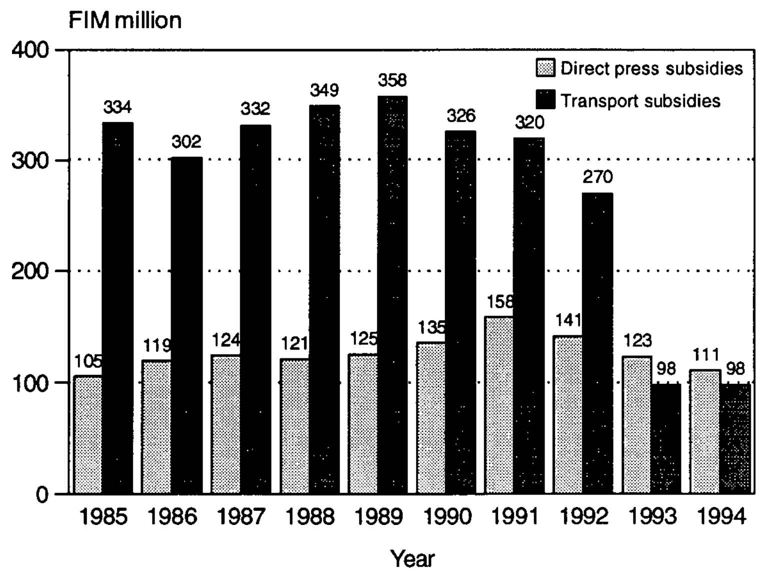
In the 1994 State Budget, these subsidies have been redefined to apply only to the non-profitable delivery of papers mainly in rural areas. The allocation of general transport subsidies by groups of papers is shown in Table 10.2.

Public support for literature (see Tables 10.3 and 10.4) is mainly provided in the form of subsidies to private persons (i.e., novelists and translators) applying for grants. There are also some subsidies that go to organizations as well as towards the promotion of literature.

The three principal forms of literature subsidies are: government arts grants, target scholarships; and authors' library fees. The latter can be described as royalties paid by the government to authors and translators whose works are available in public libraries. Each year 10 per cent of the money reserved for libraries' new acquisitions are allocated in the State Budget to this purpose (in 1993, the appropriation was FIM 14 million).

In 1992 government arts grants (see Table 9.4) were awarded to approximately 100 authors (at an annual cost of around FIM 7.1 million).

Figure 10.1
Government subsidies to the print press 1985 – 1994



Source: Table 10.1

Other subsidies are at a markedly lower level. For example, government subsidies for the publication of low-circulation quality books and for the purchase of such books by small libraries amounted to no more than FIM 2.2 million in 1993.

In 1994, state subsidies to public libraries (overheads and preliminary expenses) total FIM 598 million. During the past couple of years the amount of library subsidies has sharply decreased. (Table 10.5.)

The number of new titles in libraries' collections and the amount of money that libraries spent in purchasing new books relative to their other expense items started to decline towards the end of the 1980s. At the same time the relative share of other items (magazines, audiovisual material) has been increasing. (Table 10.6.)

Government subsidies to the film industry increased considerably in the late 1980s and early 1990s, but in 1993 this trend was reversed. Subsidies for film production can be granted either to companies or to private persons engaged in film-making, and either for film production, for cinemas or for individual showings. Part of the grants for production and distribution goes to the promotion of television and video production and distribution. (Tables 10.7, 10.8 and 10.9.)

In addition, there are some collective copyright and royalty arrangements in Finland, which could be said to resemble public support mechanisms. (Tables 10.10 - 10.15.) A major source of support for video producers and for video distribution has been the The Promotion Centre for Audiovisual Culture in Finland (AVEK), whose grants are funded by cassette fees as specified under copyright legislation. Film Foundation grants for video production come from the same source. (Tables 10.11 and 10.12.)

The cassette fee has been added to the price of blank audio and video cassettes since 1984 (in 1991, the fee for blank audio cassettes was 3 p/min and for blank video cassettes 4.5 p/min). In 1992 the accruing sum from these royalty fees was FIM 46.8 million. (Table 10.10.) The figure has been declining in recent years, mainly as a result of decisions to reduce the per minute fee for video cassettes but also because of the ongoing recession. The proceeds of the cassette royalty fee are divided according to instructions revised annually by the Ministry of Education. One third of the money is channelled directly to the copyright holders, while the remaining two thirds is allocated through copyright organizations for purposes of general promotion.

Subsidies for phonogram production are also funded through cassette royalty fees. (Tables 10.11 and 10.13.)

Compensations for photocopying in schools, public administration etc. are distributed via the member organizations of Kopiosto, a joint organization for the administration of copyrights. (Tables 10.14 and 10.15.)

The Finnish Broadcasting Company YLE is a joint stock company in which the state is the majority shareholder. Owing to its role as a public-service broadcaster, the company has been exempted since 1951 from income tax. In comparison with licence fees and other sources of income, direct government subsidies represent a rather marginal proportion of YLE revenues; in 1991/92, for instance, they accounted for 0.5 per cent (FIM 8.5 million) of the company's total incomes (see Table 1 in Chapter 2).

Statistical sources

Appropriations for public support of the mass media are listed in the State Budget as well as in the State final accounts (under various sub-items of the Ministry of Education and Ministry of Communications main divisions).

The Posts and Telecommunications Directorate provides annual estimates of the amount of transport subsidies allocated to different types of papers on the basis of the volume of newspapers, local papers and magazines delivered.

The Finnish Film Foundation gives details in its annual reports on the breakdown of film subsidies to different projects.

Data on the use of cassette royalty fees and photocopy compensations are available in the annual decisions issued by the Ministry of Education as well as in the annual reports of copyright societies (Kopiosto, the Finnish Composers' Copyright Society, the Copyright Society of Performers and Phonogram Producers in Finland, The Promotion Centre for Audiovisual Culture in Finland, The Finnish Performing Music Promotion Centre, The Foundation for the Promotion of Finnish Music).

10.1 Government subsidies to the printed press in 1980 and 1985 – 1994

Type of subsidy	1980 FIM million	1980 %	1985 FIM million	1985 %	1986 FIM million	1986 %	1987 FIM million	1987 %	1988 FIM million	1988 %	1989 FIM million	1989 %
Selective press subsidies*												
– from Council of State	32	11.4	45	10.2	49	11.5	60	13.2	61	13.0	63	13.2
– through political parties	32	11.4	45	10.2	47	11.1	40	8.8	41	8.7	42	8.9
Subsidies for news agencies**	3	1.0	5	1.0	5	1.1	5	1.1	5	1.1	6	1.2
Subsidies for joint newspaper delivery systems	1	0.1	7	1.5	15	3.5	15	3.3	10	2.1	9	2.0
Subsidies for opinion journals	1	0.3	1	0.3	2	0.4	2	0.4	2	0.4	2	0.5
Subsidies for religious journals	1	0.5	2	0.3	2	0.4	2	0.4	2	0.4	2	0.5
Direct press subsidies total	70	24.7	105	23.5	119	28.0	124	27.2	121	25.7	125	26.3
Transport subsidies***	210	74.9	334	76.1	302	71.7	332	72.7	349	74.2	358	73.7
Subsidies total	280	100.0	439	100.0	421	100.0	456	100.0	471	100.0	475	100.0

10.1 continued

Type of subsidy	1990 FIM million	1990 %	1991 FIM million	1991 %	1992 FIM million	1992 %	1993 FIM million	1993 %	1994 FIM million	1994 %
Selective press subsidies*										
– from Council of State	66	14.3	73	15.3	69	16.8	62	28.1	55	26.3
– through political parties	45	9.8	49	10.2	43	10.5	38	17.2	35	16.7
Subsidies for news agencies**	6	1.3	7	1.4	4	1.0	–	–	–	–
Subsidies for joint newspaper delivery systems	16	3.4	24	5.0	20	4.9	18	8.1	17	8.1
Subsidies for opinion journals	2	0.5	3	0.5	2	0.6	2	1.1	4	1.9
Subsidies for religious journals	2	0.4	2	0.4	3	0.6	2	1.1		
Direct press subsidies total	135	29.3	158	33.0	141	34.3	123	55.6	111	53.1
Transport subsidies***	326	70.7	320	67.0	270	65.7	98	44.3	98	46.9
Subsidies total	461	100.0	478	100.0	411	100.0	221	100.0	209	100.0

* Money to subsidize transport, delivery and other costs.
** Money to subsidize telecommunications costs of news agencies and their clients.
*** The subsidies are paid to the Posts and Telecommunications Directorate to compensate for delivery costs. In 1994 the subsidy was redefined as compensation for newspaper deliveries in rural areas.

Sources: State Budgets and final accounts.

10.2 Breakdown of transport subsidies by type of paper in 1980 and 1985 – 1992*

Type of paper	1980		1985		1986		1987		1988		1989*		1990		1991		1992	
	FIM million	%	FIM million	%	FIM million	%	FIM million	%	FIM million	%	FIM million	%	FIM million	%	FIM million	%	FIM million	%
Newspapers	135	64.3	213	63.7	183	60.6	204	61.4	214	61.4	229	64.2	222	68.1	208	65.0	161	59.7
Local papers	13	6.2	24	7.1	24	7.9	27	8.1	29	8.3	45	12.6	34	10.4	38	12.0	40	14.7
Magazines & periodicals	62	29.5	97	29.0	95	31.4	101	30.4	106	30.4	83	23.3	70	21.5	74	23.0	69	25.6
Total	210	100	334	100	302	100	332	100	349	100	357	100	326	100	320	100.0	270	100.0

* The subsidies are paid to the Posts and Telecommunications Directorate to compensate for delivery costs. The classification of print media was revised in 1989, as a result of which the proportion of magazines and periodicals grew smaller at the expense of local papers. As from 1991 the data on subsidies by type of paper are estimated on the basis of volumes.

Sources: Magazine committee report (1988), Ministry of Communications; Posts and Telecommunications

10.3 Government literature appropriations in 1980 and 1985 – 1993

	1980 FIM thousand	1980 %	1985 FIM thousand	1985 %	1986 FIM thousand	1987 FIM thousand	1988 FIM thousand	1989 FIM thousand
Promotion of Finnish-language fiction	65	1.2	95	0.6	100	100	100	100
Promotion of Swedish-language fiction	40	0.7	85	0.6	90	90	90	90
Promotion of reading	190	3.4	370	2.5	370	370	380	430
Translation and publication of Finnish literature	120	2.1	190	1.3	200	200	210	300
Training	135	2.4	200	1.4	250	250	260	270
Writers' associations	325	5.8	760	5.2	800	800	870	910
Association of Finnish Provincial Authors	110	2.0	160	1.1	170	180	190	260
The Finnish Institute for Children's Literature	–	–	220	1.5	235	235	300	340
Purchasing subsidies	–	–	350	2.4	1 000	1 000	1 200	1 400
Publication subsidies	–	–	–	–	–	–	–	200
Authors' library fees	4 600	82.4	12 300	83.5	13 000	15 070	15 710	16 141
Total	5 585	100.0	14 730	100.0	16 215	18 295	19 310	44 990

10.3 continued

	1990 FIM thousand	1990 %	1991 FIM thousand	1991 %	1992 FIM thousand	1992 %	1993 FIM thousand	1993 %
Promotion of Finnish-language fiction	100	0.4	105	0.4	105	0.4	100	0.5
Promotion of Swedish-language fiction	90	0.4	100	0.4	100	0.4	95	0.5
Promotion of reading	470	2.1	500	2.1	500	2.1	–	0.0
Translation and publication of Finnish literature	400	1.8	700	3.0	950	3.9	850	4.3
Training	290	1.3	300	1.3	300	1.2	700	3.6
Writers' associations	960	4.3	1050	4.5	1 050	4.3	1 230	6.3
Association of Finnish Provincial Authors	290	1.3	305	1.3	305	1.3	–	0.0
The Finnish Institute for Children's Literature	370	1.6	400	1.7	400	1.7	340	1.7
Purchasing subsidies	1 550	6.9	1 650	7.1	1 650	6.8	1 524	7.8
Publication subsidies	500	2.2	750	3.2	850	3.5	700	3.4
Authors' library fees	17 475	77.7	17 500	74.9	18 000	74.3	14 000	71.7
Total	22 495	100.0	23 360	100.0	24 210	100.0	19 539	100.0

Sources: State Budgets and final accounts; ARSIS 4/92.

10.4 Government arts grants: the share of literature in 1992

	Grants to authors and translators	Annual expense
	No.	FIM thousand*
Arts grants for		
15 years	33	2 200
5 years	17	1 133
3 years	33	2 200
1 year**	23	1 533
Arts grants total	106	7 067

* Calculated proportion of estimated appropriation in the 1992 State Budget.
** Six-month grants have been multiplied by two and counted as 1-year grants.

Source: Central Commission for Art.

10.5 Government subsidies to public libraries in 1980 and 1985 – 1994

Type of subsidy	1980	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994
	FIM million										
State subsidies to cover overheads	207	384	419	471	517	565	621	701	741	606	563
State subsidies to cover establishment expenses	20	25	28	30	30	36	42	40	41	39	35
Construction loans	4	11	2	–	–	–	–	–	–	–	–
Total	231	419	449	501	547	601	663	741	782	645	598

Sources: State Budgets and final accounts.

10.6 Public libraries: materials expenses and book acquisitions in 1980 and 1985 – 1992

Year	No. of books purchases	Book acquisition costs	Materials acquisition costs total
	'000 copies	FIM million	FIM million
1980	1 962	72.8	..
1985	2 405	142.9	175.1
1986	2 390	149.9	188.2
1987	2 442	156.4	199.7
1988	2 361	160.3	206.6
1989	2 316	171.9	224.6
1990	2 318	178.3	240.9
1991	2 056	174.3	243.3
1992	1 808	156.3	224.7

Sources: National Board of General Education/Ministry of Education.

10.7 Government subsidies to the cinema in 1980 and 1985 – 1993

Type of subsidy	1980		1985	1986	1987	1988	1989
	FIM thousand	%	FIM thousand				
Finnish film and programme production and distribution	6 250	59.5	17 400	19 500	19 300	19 000	21 000
Cinema organizations	200	1.9	360	500	1 300	1 300	1 730
Support for cinematic art	750	7.1	2 450	2 700	2 700	2 700	–
Finnish Film Foundation	–	–	–	–	–	–	4 700
Technical equipment for Finnish Film Foundation	–	–	1 600	1 600	1 600	1 200	1 200
Funding for Finnish Film Foundation	–	–	–	–	–	2 200	2 200
Regional cinema centres	490	4.7	1 150	1 200	1 200	1 200	1 500
Renovation of cinemas	–	–	1 000	1 200	1 200	1 200	–
Increasing supply of film copies	170	1.6	360	700	700	1 200	–
Theatre subsidies	–	–	–	–	–	–	2 400
Finnish Film Archive	2 647	25.2	8 659	8 829	9 246	9 154	9 933
Finland's contribution to Eurimages fund	–	–	–	–	–	–	–
Finland's contribution to AV-Eureka	–	–	–	–	–	–	–
Total	10 507	100.0	32 979	36 229	37 246	39 154	44 663

10.7 continued

Type of subsidy	1990		1991		1992		1993	
	FIM thousand	%	FIM thousand	%	FIM thousand	%	FIM thousand	%
Finnish film and programme production and distribution	31 500	55.1	43 000	58.1	44 000	57.7	38 500	55.5
Cinema organizations	1 830	3.2	2 150	2.9	2 000	2.6	1 760	2.5
Support for cinematic art	–	–	–	–	–	–	–	–
Finnish Film Foundation	5 200	9.1	7 500	10.1	8 000	10.5	6 000	8.6
Technical equipment for Finnish Film Foundation	1 000	1.7	1 050	1.4	1 050	1.4	1 000	1.4
Funding for Finnish Film Foundation	2 200	3.8	2 500	3.4	2 500	3.3	2 500	3.6
Regional cinema centres	1 650	2.9	1 800	2.4	1 800	2.4	1 584	2.3
Renovation of cinemas	–	–	–	–	–	–	–	–
Quality support							1 500	2.2
Film culture							1 000	1.4
Increasing supply of film copies	–	–	–	–	–	–	–	–
Theatre subsidies	3 400	5.9	3 700	5.0	3 910	5.1	3 610	5.2
Finnish Film Archive	9 859	17.2	11 378	15.4	11 799	15.5	9 950	14.3
Finland's contribution to Eurimages fund	550	1.0	800	1.1	1 000	1.3	1 169	1.7
Finland's contribution to AV-Eureka	–	–	180	0.2	260	0.3	303	0.4
Not distributed							500	0.7
Total	57 189	100.0	74 058	100.0	76 319	100.0	69 376	100.0

Sources: State Budgets and final accounts; ARSIS 4/92.

10.8 Government arts grants: the share of cinema in 1992

	Grants No.	Annual expense FIM thousand*
Arts grants for		
15 years	6	400
5 years	5	333
3 years	9	600
1 year**	6	400
Arts grants total	26	1 733

* Calculated proportion of estimated appropriation in the 1992 State Budget.
** Six-month grants have been multiplied by two and counted as 1-year grants.

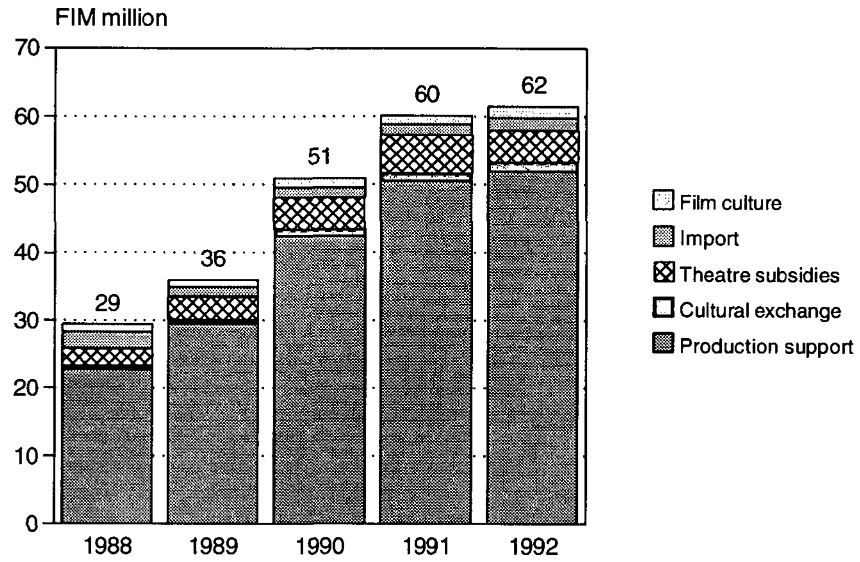
Source: Central Commission for Art.

10.9 Grants and subsidies from the Finnish Film Foundation 1988 – 1992

	1988		1989		1990		1991		1992	
	FIM thousand	%	FIM thousand	%	FIM thousand	%	FIM thousand	%	FIM thousand	%
Production subsidies	22 698	77.1	29 438	81.7	42 460	83.3	50 462	83.8	51 976	84.4
Subsidies for cultural exchange	570	1.9	683	1.9	969	1.9	1 196	2.0	1 304	2.1
Subsidies for cinemas	2 533	8.6	3 360	9.3	4 644	9.1	5 551	9.2	4 620	7.5
Import and presentation	2 453	8.3	1 383	3.8	1 567	3.1	1 655	2.7	1 944	3.2
Film culture	1 173	4.0	1 147	3.2	1 340	2.6	1 347	2.2	1 716	2.8
Total	29 427	100.0	36 011	100.0	50 980	100.0	60 211	100.0	61 560	100.0

Source: Finnish Film Foundation annual report 1992.

Figure 10.2
Grants and subsidies from the Finnish Film Foundation 1988 – 1992



Source: Table 10.9

10.10 Net returns from blank cassette fee 1985 – 1992*

	FIM million	Audio cassettes %	Video cassettes %
1985	26.6	42	58
1986	44.3	32	68
1987	44.7	31	69
1988	58.5	24	76
1989	58.6	25	75
1990	61.0	26	74
1991	56.8	25	75
1992	46.8	21	79

* The fee is collected in accordance with copyright legislation as revised on 15 June 1984.
In 1991, the fee for blank audio cassettes was 3 p/min and for blank video cassettes 4.5 p/min.
The fee is revised annually by the Ministry of Education.

Source: The Finnish Composers' Copyright Society annual reports.

10.11 Allocation of blank cassette fee 1988 – 1992

	1988	1989	1990	1991	1992
	FIM thousand				
Indirect compensations					
Promotion Centre for Audiovisual Culture in Finland (AVEK)	4 400	4 600	4 200	2 500	2 700
Kopiosto/AVEK	7 500	11 800	12 400	13 500	13 000
Finnish Film Foundation	7 000	5 000	3 500	4 800	3 000
Finnish Performing Music Promotion Centre	7 425	7 430	7 400	7 000	5 810
Foundation for the Promotion of Finnish Music	4 325	4 200	4 170	3 790	2 650
Copyright Information Centre	400	250	250	250	250
Centre for the Promotion of Finnish Literature	250	650	650	630	570
Kuvasto: photo copyrights					250
Association for the Deaf	50	50	50	50	50
Finnish Copyright Association	200	100	100	95	640
Centre for the Promotion of Visual Arts	300	300	300	300	
Finnish Composers' Copyright Society	450	750	650	550	
Allocated for separate uses	6 712	3 995	5 916	3 465	1 636
Total	39 012	39 125	39 586	36 930	30 556
Direct compensations to copyright holders	19 505	19 563	21 378	19 856	16 248

Source: Ministry of Education.

10.12 Grants and subsidies from the Promotion Centre for Audiovisual Culture in Finland (AVEK) 1991/92*

	1991/92 Applications approved	Amount granted	Share of subsidies applied for
	No.	FIM thousand	%
Production subsidies:	192	10 689	20.0
Producer	34	423	–
Manuscript	55	707	26.0
Preparations	21	662	25.0
Production	57	7 813	17.0
Distribution	17	592	63.0
Other production subsidies	6	241	26.0
Temporary funding	2	250	27.0
Educational subsidies:	81	1 152	17.0
Personal grants	79	1 112	16.0
Educational material	2	40	33.0
Research and publishing	16	335	16.0
Video workshop subsidies	9	350	9.0
Other support for audiovisual culture	22	601	53.0
Total	320	13 127	20.0

* Funded through cassette royalty fees.

Source: Annual report of AVEK 1991/92

10.13 Grants and subsidies from the Finnish Performing Music Promotion Centre (ESEK)1992*

	1992	Light music	Serious music	Total
	FIM thousand	%	%	%
Phonogram production	7 134	76	24	100
Audiovisual music programmes	2 548	87	13	100
Public appearances	4 066	52	48	100
Training and education	421	35	65	100
Publishing and other	43	6	94	100
Total	14 169			

* Funded mainly through fees collected from the playing of foreign music in Finland and cassette royalty fees.

Source: Annual reports of Gramex, the Copyright Society of Performers and Phonogram Producers in Finland.

10.14 Royalties collected by Kopiosto for photocopying 1985 – 1992

	1985	1986	1987	1988	1989	1990	1991	1992
	FIM thousand							
State/schools*	5 240	5 650	5 875	6 080	6 320	6 570	10 035	10 867
Public administration	630	660	685	710	740	770	805	833
Municipal administration	381	478	482	627	682	726	788	1 040
National Ecclesiastical Board	195	221	246	262	314	367	381	418
Business companies	262	274	313	437	457	545	713	707
Others**	–	–	1	8	8	40	79	108
Total	6 708	7 283	7 602	8 124	8 521	9 018	12 801	13 973

* Copying at schools, universities and in state personnel training.
** Since 1988 the sum consists chiefly of fees collected from language schools operating on a commercial basis.

Source: Kopiosto annual reports.

10.15 Photocopying royalties paid out by Kopiosto to its member organizations in 1992

	FIM thousand	%
Literature	309	2.5
Author organizations	201	1.6
Publisher organizations	108	0.9
Photo	1 823	14.6
Photographer organizations	1 235	9.9
Publisher organizations	588	4.7
Print press	2 473	19.9
Journalist organizations	1 237	9.9
Publisher organizations	1 237	9.9
Editor organizations	124	1.0
Music	752	6.0
Composer organizations	376	3.0
Publisher organizations	376	3.0
Non-fiction	7 096	57.0
Author organizations	2 834	22.8
Publisher organizations	4 258	34.2
Total	12 453	100.0

Source: Kopiosto annual report 1992.

11 *International comparisons*

This chapter provides selected comparative data on the role and function of the mass media in different countries. It is important to bear in mind that in spite of efforts at standardization, statistical standards and criteria may still vary in different countries; the data are not always fully comparable.

For instance, the sources used in this chapter on the reach of satellite channels are just a small selection; there are many others. The data given by different sources vary considerably, especially as regards channels with smaller audiences. Therefore these data must be examined with caution.

The different criteria of calculation applied in various comparisons may also yield very different results. For instance, the 1993 edition of the Television Business International Yearbook has three different lists of the biggest media companies, using different sets of criteria in each to rank-order them.

The Unesco Statistical Yearbook is an important source that is widely used in various international comparisons. Group of European Audience Researchers GEAR's annual statistics include a wide range of data on the reach of different media, on time usage with the media and media advertising.

Comparative data on the mass media in the Nordic countries are available in various Nordic publications, such as the Yearbook of Nordic Statistics, which is published yearly.

11.1 Circulation of dailies in different countries in 1988, 1991 and 1992

Circulation/1 000 inhabitants

	1988	1991	1992		1988	1991	1992
Norway	550	600	619	Slovak Republic	246	187	179
Japan	580	591	584	Ireland	176	183	177
Sweden	519	518	522	Belgium	182	173	173
Finland	550	539	521	Israel	135	158	–
Germany	336 *	396	426	France	157	157	–
Switzerland	432	416	415	Poland	–	–	126
Austria	357	337	409	Italy	117	113	115
Czech Republic	–	–	396	Malaysia	–	112	–
England	391	367	362	Cyprus	102	96	91
Singapore	281	329	348	Greece	127	92	83
Denmark	355	327	340	Spain	79	81	81
Luxembourg	–	320	333	Argentina	–	–	79
Netherlands	313	317	317	Turkey	55	69	56
New Zealand	–	301	264	South Africa	41	43	44
USA	255	251	244	Philippines	–	43	–
Russia	337	210	222	Portugal	–	39	39
Canada	221	218	214	Uruguay	–	–	35
Australia	–	220	199	Tunisia	–	–	30
Estonia	430	409	195	India	21	23	24
				Brazil	12	15	15

* Former West Germany

Source: World press trends, FIEJ 1993.

11.2 Circulation of general-interest magazines in selected European countries, USA and Japan in 1989

	Circulation/1 000 inhabitants
Belgium	330
Denmark	390
Finland	2 560
France	580
Germany	1 720
Great Britain	620
Holland	1 040
Japan	1 890
Norway	620
Sweden	780
Switzerland	620
USA	1 490

NB: The criteria for classification as general-interest magazine vary from country to country.

Source: FIPP Survey of the magazine business 1988–1989.

11.3 Book production in Europe in 1990

	Titles/10 000 population
Austria**	13.4
Belgium*	6.9
Belorussia	2.7
Bulgaria	10.0
Czechoslovakia	5.5
Denmark	21.6
Finland	20.4
Former Soviet Union*	3.4
Former West Germany	9.6
Former Yugoslavia	4.1
France	7.4
Greece	3.2
Holland	9.2
Hungary	7.9
Iceland	59.4
Italy	4.4
Norway***	8.8
Portugal*	6.2
Poland	2.7
Rumania	0.9
Spain	9.3
Sweden	14.1
Switzerland	20.6
Ukraine	1.4

* Data from 1989
** Does not include schoolbooks
*** Does not include schoolbooks and titles published by public administration.

Source: Unesco statistical yearbook 1992.

11.4 Selected data on the ownership and use of home electronics and communication media in Europe, USA and Japan in 1991/92

	Austria	Belgium	Bulgaria	Czech Republic	Denmark	Finland	France	Germany	Great Britain	Holland	Hungary	Ireland	Italy
Population aged 14 and over	6.5	4.0/4.7	7.5	8.1	4.3	4.1	45.3	48.1	47.2	12.1	8.4	2.6	48.4
Number of households	3.1	1.4/2.3	3.0	3.8	2.3	2.0	21.5	24.8	22.7	6.1	3.8	1.1	19.9
Monthly GNP per capita (US$)	1 746	1 669	568	–	2 104	2 098	1 751	1 631	1 479	1 585	741	1 030	1 653
Home electronics and communication media	**% of households with access**												
Telephone	88	80/82	61	23	96	90	95	98	87	98	19	71	90
Television	97	96/99	54	99,9	98	98	97	98	97	98	98	96	99
Colour TV	93	90/95	–	79	94	95	92	97	92	96	72	93	91
Two or more TV sets	32	21/14	–	30	25	42	35	22	49	27	39	25	42
Remote control	74	69/74	–	35	67	63	72	89	67	75	31	62	86
VCR	42	40/41	–	16	49	59	48	51	63	56	34	50	29
Teletext	26	–/21	–	3	50	47	–	32	38	53	3	20	23
Stereo TV	22	–/29	–	7	38	24	–	46	15	40	–	–	–
Video games	6	11/–	–	2	22	7	17	11	10	–	–	8	6
Home computer	8	16/8	–	6	22	20	16	10	29	21	6	13	12
Car radio	54	45/73	–	30	69	62	66	74	61	65	24	60	32
Hi-fi/stereo	52	67/72	–	12	81	76	50	74	54	90	50	36	–
CD players	17	19/21	–	4	29	21	33	21	18	55	–	9	8
Communal aerial	11	4/0,1	–	50	52	50	32	–	5	1	27	–	43
Cable/Sat TV	33	97/96,1	–	6	49	40	5	39	10	92	46	38	–
Daily reach	**% of adult population**												
Television													
– *national broadcasts*	69	–/52	93	87	–	64	84	–	79	67	–	77	–
– foreign broadcasts	26	–/–	2	6	–	8	–	–	0	–	–	41	–
– television total	71	75/70	93	87	74	66	–	69	79	77	86	–	75
Radio													
– national broadcasts	75	53/–	77	80	78	68	77	–	47	64	86	67	–
– foreign broadcasts	8	19/–	6	10	3	1	1	–	0	–	2	–	–
– radio total	78	–/77	77	82	78	82	77	89	47	78	86	87	58
Dailies	73	55/64	19	–	76	90	–	82	62	75	–	66	41
Time use	**Min/day**												
Average TV viewing time													
– *national broadcasts*	98	97/99	145	173	117	106	–	–	223	72	128	–	–
– foreign broadcasts	29	104/41	5	6	30	3	–	–	0	68	3	–	–
– television total	127	201/140	150	180	147	109	190	160	223	140	131	206	197
Average radio listening time													
– national broadcasts	140	129/–	80	201	152	144	–	–	90	128	130	215	–
– foreign broadcasts	12	42/–	2	13	4	62	–	–	0	38	–	9	–
– radio total	152	171/229	82	214	156	206	145	–	90	166	–	224	87
Television/radio licence fees (US$)	246	218	–	31	264	190	120	160	133	105	20	33	114

Owing to differences in data collection methods the data for different countries are not fully comparable. - Data on ownership of home electronics in households except for Switzerland, Denmark and Hungary for population. - Other data for share of population. - Data for Switzerland's German/French/Italian-speaking population separately. - Data for Belgium's French/Flemish-speaking population separately. Spanish data separately for whole population and Catalonia population. - Belgium's data on ownership of home electronics for 1989 and 1990. - Portugal's data for 1989. - Norway's data on ownership of home electronics for 1989. - Turkish data for 1989 and 1990. - Hungary's data on ownership of home electronics for 1989. - Russian data for 1990.

Source: Euro-Factbook. Basic Hardware&Audience Data. GEAR 1992.

11.4 continued

	Japan	Norway	Poland	Portugal	Russia	Serbia	Slovakia	Slovenia	Spain	Sweden	Switzerland	Turkey	USA
Population aged 14 and over	102.7	3.6	29.0	8.4	7.5	5.8	4.1	1.6	32.0/4.9	7.0	4.1/1.3/	32.7	203.0
Number of households	41.8	1.8	12.0	3.3	–	1.7	1.7	0.6	11.3/1.9	3.8	1.9/0.6/	8.5	93.1
Monthly GNP per capita (US$)	2 262	2 065	–	479	–	–	–	527	1 127	2 294	2 768	156	1 830
Home electronics and communication media	% of households with access												
Telephone	98	90	34	41	90	–	34	56	74/87	99	96/94/95	88	99
Television	99	97	99	97	99	–	99	74	99/100	94	93/95/98	96	98
Colour TV	99	95	74	71	69	–	63	79	94/99	93	92/95/97	–	98
Two or more TV sets	75	30	31	26	10	–	22	20	33/45	36	13/10/21	–	67
Remote control	87	74	40	21	–	–	–	–	49/72	81	84/83/92	–	87
VCR	85	60	40	36	1	–	12	35	44/62	64	45/53/49	–	75
Teletext	4	36	12	–	–	–	3	17	8/11	59	40/33/40	–	–
Stereo TV	–	–	–	–	–	–	–	–	–/18	21	–/–/–	–	–
Video games	34	10	–	–	–	–	–	–	10/–	19	4/9/6	–	–
Home computer	31	16	7	3	–	–	4	–	9/12	18	–/–/–	–	–
Car radio	88	75	33	33	6	–	–	18	51/50	73	71/68/66	–	95
Hi-fi/stereo	29	70	15	20	19	–	–	–	28/26	82	–/–/–	–	–
CD players	42	20	2	2	–	–	5	–	7/4	28	45/49/25	–	–
Communal aerial	–	16	–	–	–	–	40	38	47/61	41	–/–/–	–	61
Cable/Sat TV	14	38	17	4	18	–	24	60	7/3	47	74/74/73	–	–
Daily reach	% of adult population												
Television													
– national broadcasts	97	69	82	70	74/37	79	78	–	90/80	70	55/55/50	–	48
– foreign broadcasts	0	–	6	2	–	1	10	–	1/1	18	–/–/–	–	–
– television total	97	–	83	70	–	–	80	80	90/–	78	70/69/69	–	–
Radio													
– national broadcasts	47	–	–	39	61	42	–	85	52/53	73	53/40/61	39	78
– foreign broadcasts	0	–	–	0	10	–	–	20	–	0	11/23/13	3	–
– radio total	47	70	–	39	–	–	–	90	52/–	73	76/63/70	–	78
Dailies	88	–	–	26	–	–	–	–	32/37	83	45/36/46	–	61
Time use	Min/day												
Average TV viewing time													
– national broadcasts	201	78	192	168	135/85	–	–	118	186/203	86	39/49/47	180	–
– foreign broadcasts	0	13	–	4	–	–	–	29	1/–	18	79/88/89	–	–
– television total	201	91	–	172	–	177	–	147	187/–	104	118/137/	–	242
Average radio listening time													
– national broadcasts	33	–	–	95	113	–	–	156	117/106	117	159/78/1	60	163
– foreign broadcasts	0	–	–	–	–	–	–	47	–	0	24/41/23	–	–
– radio total	33	125	–	–	–	85	–	203	117/–	117	183/119/	–	–
Television/radio licence fees (US$)	127	208	8	35	0	–	–	–	0	248	282	–	–

Owing to differences in data collection methods the data for different countries are not fully comparable. - Data on ownership of home electronics in households except for Switzerland, Denmark and Hungary for population. - Other data for share of population. - Data for Switzerland's German/French/Italian-speaking population separately. - Data for Belgium's French/Flemish-speaking population separately. Spanish data separately for whole population and Catalonia population. - Belgium's data on ownership of home electronics for 1989 and 1990. - Portugal's data for 1989. - Norway's data on ownership of home electronics for 1989. - Turkish data for 1989 and 1990. - Hungary's data on ownership of home electronics for 1989. - Russian data for 1990.

Source: Euro-Factbook. Basic Hardware&Audience Data. GEAR 1992.

11.5 Audience shares of public-service television broadcasting in Europe in 1991

	%		
Austria	79	ORF	(2 channels)
Belgium, Walloon	23	RTBF	(2 channels)
Denmark	76	DR, TV2	
Finland	55	YLE	(2 channels 1993–)
France	33	A2, FR3	
Germany	64	ARD	(2 channels), ZDF
Great Britain	55	BBC	(2 channels), Channel Four
Greece	22	ET	(2 channels)
Holland	54	NOS	(3 channels)
Ireland*	67	RTE	(2 channels)
Italy	49	RAI	(3 channels)
Norway*	80	NRK	(1 channel)
Portugal*	91	RTP	(2 channels)
Switzerland, German	37	SRG	(1 channel per language area)
Spain	57	TVE	(2 channels)
Sweden*	84	SvT	(2 channels)

* Commercial competition not yet reflected in measurements.

Source: Finnish Broadcastion Company Yle, Media development group.

11.6 Pan-European satellite channel connections* by target country in summer 1993

Channel	Language	Connections								
		Finland	Sweden	Norway	Denmark	Great Britain	Ireland	France	Belgium	Holland
		'000								
BBC World Service TV	English	22	243	66	469			540		
MTV Europe	English	655	1 749	449	706	519	47	789	3 551	4 808
Eurosport	English	650	1 550	200	621	485		775	3 509	5 303
Super Channel	English	742	792	533	908	488	296	328	2 028	4 324
Filmnet	English	52	230	50	100				110	110
TV5 Europe	French	660	1 357	411	1 100	354	34	1 089	1 610	5 082
TV3	Swedish		2 245	691	1 023					
CNN	English	2	394	167	514	305	27	405	3 138	4 543
Children's Channel	English	22	391	96	566	585	350			797
Euronews	English	391	128	257	105	283		896	1 742	606
Sky News	English	5		16	58	606	150			
TNT Cartoon	English			524		340			200	261
CMT Europe	English	60	60	80	100	400				
TV1000	Swedish		240	65	25					
Arte	French/ German							1 339	1 800	
MCM	French		100	100	500	10		850		
Discovery	English	27	260	118	782	491	36			1 700

continued

* Includes cable connections by household. Includes channels with connections in several language areas as well as commercial Nordic satellite channels with connections in at least two Scandinavian countries.

Source: *Cable & Satellite Europe 12/1993.*

11.6 continued

Channel	Language	Connections: Luxembourg	Germany	Switzerland	Austria	Spain	Slovenia/ Croatia	Hungary	Total	Funding
		'000								
BBC World Service TV	English		5	25		2			1 372	public, subscriptions fees
MTV Europe	English	80	12 453	1 587	661	75	99	466	28 694	advertising
Eurosport	English	110	12 950	2 134	711	600	150	800	30 548	advertising
Super Channel	English	95	12 568	1 919	623	976	150	539	27 309	advertising
Filmnet	English								652	pay-tv
TV5 Europe	French	84	11 400	1 360	439	72		597	25 649	public funding
TV3	Swedish									advertising
CNN	English	19	7 535	1 767	351	1 406	396		20 969	subscription, advertising
Children's Channel	English								2 807	subscription, advertising
Euronews	English	25	4 658	388	93	128		125	9 825	public funding
Sky News	English								835	subscription, advertising
TNT Cartoon	English	75							1 400	subscription, advertising
CMT Europe	English								700	subscription, advertising
TV1000	Swedish								330	pay-tv
Arte	French/ German		12 000						15 139	public funding
MCM	French								1 560	advertising
Discovery	English								3 414	subscription, advertising

* Includes cable connections by household. Includes channels with connections in several language areas as well as commercial Nordic satellite channels with connections in at least two Scandinavian countries.

Source: Cable & Satellite Europe 12/1993.

11.7 Breakdown of radio listening between public-service broadcasting and commercial radio stations in Europe in 1991

Country	Public-service broadcasting company	Share of public service %	Share of private stations %	Share of foreign radio %
Austria*	ORF	93	–	7
Belgium (French)	RTBF	73	15	12
Czechoslovakia*	CR	95	–	5
Denmark	DR	67	33	–
Finland	YLE	70	30	–
Germany (West)	SR	72	27	1
Great Britain (1990/91)	BBC	65	35	–
Holland*	NOS	77	–	23
Ireland	RTE	66	34	–
Italy	RAI	39	61	–
Sweden*	SR	99	–	1
Switzerland	SRG			
–German		56	31	13
–Rhaeto-Romanic		53	14	33
–Italian		77	8	15
Average				
(A) All 12 countries		72	20	8
(B) Countries with commercial radio stations		64	29	7

* No commercial radio stations in 1991.

Source: GEAR, Radio Survey 1991.

11.8 Phonogram sales in Europe, USA and Japan in 1992

	Singles	LPs	MCs	CDs	Sales total
	Million copies				US$ million
Austria	1.7	1.9	3.3	9.6	288.6
Belgium	4.1	0.0	2.5	14.1	320.5
Denmark	0.8	2.0	1.5	0.5	192.0
Finland	0.5	2.6	4.6	5.5	129.6
France	16.8	0.3	35.5	78.5	1 935.4
Germany	26.6	5.0	55.6	123.7	2 636.9
Great Britain	52.9	6.7	56.4	70.5	1 998.2
Greece	–	4.1	1.9	1.8	61.5
Holland	4.2	0.6	1.8	33.2	647.4
Iceland	–	0.05	0.05	0.4	12.3
Ireland	0.8	0.06	2.3	1.1	61.6
Italy	1.1	3.1	21.2	23.6	653.8
Japan	90.3	0.8	31.7	181.8	4 328.5
Norway	0.7	0.4	4.5	11.0	232.5
Poland	–	0.6	18.0	2.1	64.4
Portugal	0.0	0.8	1.7	2.8	74.0
Russia	..	..	100.0	..	150.0
Spain	1.3	9.6	21.3	20.1	586.7
Sweden	3.3	2.0	4.5	15.4	201.8
Switzerland	1.0	0.6	3.8	13.7	321.9
USA	111.7	2.3	366.4	407.5	8 866.6

Source: IFPI world sales 1992.

11.9 Proportion of VCR households and market shares of video rentals and sell-through in selected European countries and USA in 1991

	VCR households % of TV households	Market share Rentals %	Sell-through %
Finland	66	60	40
France	47	..	..
Germany	49	53	47
Great Britain	72	35	65
Holland	58	60	40
Ireland	40	..	..
Italy	32	..	..
Japan	77	64	34
Spain	41	63	37
Sweden	65	..	..
Switzerland	61	..	..
USA	73	48	52

Source: 1991 IVF market database.

11.10 Cinema admissions per inhabitant in Europe 1989-1991 and number of cinemas in 1991

	Cinema admissions/person			Number of cinemas
	1989	1990	1991	1991
Austria	1.5	1.3	1.3	394
Belgium	1.5	1.7	1.7	431
Denmark	2.0	1.9	1.8	322
Finland	1.5	1.2	1.2	333
France	2.1	2.2	2.1	4 441
Germany	1.6	1.6	1.7	3 686
Great Britain	1.7	1.7	1.8	1 789
Greece	1.7	1.3	1.0	350
Holland	1.1	1.0	1.0	418
Ireland	2.0	2.1	2.3	173
Italy	1.7	1.6	1.5	3 100
Luxembourg	1.3	1.4	1.6	18
Norway	3.0	2.7	2.5	428
Portugal	1.3	1.1	1.2	200
Spain	2.0	2.0	2.0	1 806
Sweden	2.3	1.7	1.8	1 144
Switzerland	2.3	2.1	2.2	401

Source: European marketing pocket book, NTC 1993.

11.11 Breakdown of advertising by media in Europe in 1991 (%)*

	Total	Newspapers	Magazines	Television	Radio	Cinemas	Outdoor & transport
Austria	100	53.0	17.5	16.6	7.5	0.4	5.0
Belgium	100	34.5	20.2	26.9	4.1	1.2	13.1
Denmark	100	63.3	15.8	16.8	1.4	0.7	2.0
Finland	100	67.8	10.6	15.0	4.0	0.1	2.5
France	100	27.0	26.6	27.2	6.5	0.6	12.0
Germany	100	50.1	23.2	17.6	4.5	1.1	3.7
Great Britain	100	44.0	18.3	31.6	2.1	0.6	3.4
Greece	100	20.7	21.6	50.3	3.6	..	3.9
Holland	100	50.1	25.3	13.4	2.3	0.4	8.4
Ireland	100	62.7	4.4	20.4	7.6	..	4.9
Italy	100	27.1	23.0	45.0	1.4	..	3.6
Norway	100	76.4	15.5	3.3	1.2	1.3	2.3
Portugal	100	24.9	21.1	39.9	6.2	..	7.8
Spain	100	38.0	14.8	29.8	10.8	0.9	5.6
Sweden	100	75.4	14.7	4.7	..	0.6	4.5
Switzerland	100	58.8	18.9	6.9	2.0	0.9	12.5

* The data are net of discounts. They include agency commission and press classified advertising, but exclude production costs.

Source: European marketing pocket book, NTC 1993.

11.12 Breakdown of advertising by media in Europe in 1981 and 1991 (%)

	1981 %	1990 %
Newspapers	47.7	44.8
Magazines	25.6	21.7
Television	16.7	23.0
Radio	4.0	4.3
Outdoor & transport	5.2	5.6
Cinemas	0.9	0.7

Sources: Suomen Lehdistö 1/992; International Advertising Expenditure Statistics, EAT 1991; European Market & Media Facts, Zenith, 1990.

11.13 Biggest media corporations in Europe and the Nordic countries in 1992

	Turnover from mass media US$ million	Mass media as % of total turnover %
Bertelsmann (Germany)	8 522	95
Fininvest (Italy)	5 712	43
ARD* (Germany)	3 910	100
Hachette (France)	3 532	64
RAI* (Italy)	3 343	100
Havas (France)	3 210	74
BBC* (Great Britain)	2 682	100
RTVE* (Spain)	2 103	100
Reed Int. (Great Britain)	2 102	75
Axel Springer (Germany)	1 968	90
Scandinavian countries:		
Bonnier (Sweden)	931	93
Egmont (Denmark)	545	85
Sanoma (Finland)	520	90
Schibstedt (Norway)	367	95

* Public-service broadcaster.

Source: TBI Yearbook 93; Media Sverige 1993.

Appendices

APPENDIX 1. Rates of exchange, yearly averages

	ECU/FIM	USD/FIM
1980	0.193	0.268
1981	0.208	0.232
1982	0.212	0.207
1983	0.201	0.180
1984	0.211	0.166
1985	0.212	0.161
1986	0.200	0.197
1987	0.197	0.227
1988	0.202	0.239
1989	0.211	0.233
1990	0.206	0.261
1991	0.200	0.247
1992	0.172	0.223
1993	0.149	0.175

SOURCE:
Bank of Finland

APPENDIX 2. Transformation coefficients into 1991 and 1992 money (FIM)

	Into 1991 money Coefficient	Into 1992 money Coefficient
1980	1.997	2.048
1981	1.783	1.829
1982	1.631	1.673
1983	1.503	1.541
1984	1.405	1.441
1985	1.327	1.360
1986	1.281	1.313
1987	1.236	1.267
1988	1.178	1.207
1989	1.105	1.133
1990	1.042	1.068
1991	1.000	1.025
1992		1.000

Deflated by the level of living index 1951:10=100
SOURCE:
Statistics Finland - Prices and Wages Statistics

APPENDIX 3. Gross domestic product 1980–1993

	At current prices, FIM million
1980	192 605
1981	218 477
1982	245 716
1983	274 647
1984	308 357
1985	332 012
1986	355 373
1987	387 033
1988	434 533
1989	486 918
1990	514 844
1991	490 058
1992	475 608
1993	471 443

SOURCE:
Statistics Finland - Economic Statistics: national accounts

APPENDIX 4. Population at the end of 1980–1993

Year	Population
1980	4 787 800
1981	4 812 200
1982	4 841 700
1983	4 869 900
1984	4 893 700
1985	4 910 700
1986	4 925 600
1987	4 938 600
1988	4 954 400
1989	4 974 400
1990	4 998 500
1991	5 029 000
1992	5 055 000
1993	5 080 000

SOURCE:
Statistics Finland - Population Statistics

Index

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