

## 3.1

### PRINT MEDIA IN A CHANGING MEDIA WORLD: CHANGES IN TIME SPENT WITH DIFFERENT MEDIA IN FINLAND IN THE 80's

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#### **BACKGROUND: DEVELOPMENTS IN THE SUPPLY OF MASS COMMUNICATION IN THE 1980's**

The situation in Finland is especially interesting because the media landscape has changed rapidly in the 80's, not only technically but politically, too; the state monopoly of the electronic media was broken in 1985. In this decade Finland has got private commercial radio stations, many new cable TV companies, and the new national TV channel, Channel 3. All this has had implications both on 'conventional' media and on 'conventional' readership research.

#### **Newspapers**

The development of the circulation of 'regular' newspapers published at least three times a week in Finland has shown a consistently rising trend. In 1988, 80 such newspapers were being published, their aggregate circulation being approximately 3,200,000. Since the beginning of the decade, the circulation has grown by around 14%.

In the 1980's local newspapers substantially increased their numbers and consequently their general circulation. This trend seems to have attained its peak in the middle of this decade, when there was a total of 170 of these newspapers. In 1988 the number of local newspapers was 162. The aggregate circulation is slightly under one million, the increase since the beginning of the decade being 26%.

It is difficult to obtain an overall picture of the development of the supply of free distributed

newspapers because of the deficiencies in statistics, but throughout the 1980's this group of newspapers has been increasing its share of advertising money.

#### **Periodicals**

About 2,000 periodicals covering varying sectors are published in Finland.

For the different groups of periodicals, developments in the 1980's have been most divergent. The total circulation of general magazines has dropped by around 8% since the beginning of the decade; in women's magazines the drop has been about 5%.

The aggregate circulation of other public periodicals has been more favourable than is the case with general and women's magazines. The trend in circulation has risen most sharply for professional and organisational publications. Customer periodicals, too, have also succeeded in augmenting their circulations throughout the decade.

#### **Direct marketing**

The share of direct marketing in advertising money has recorded relatively the greatest rise; it is a growing sector in Finland.

#### **Television**

The most significant change in the 1980's was the introduction of a third national television channel, Channel 3, in 1987. The traditional Channel 1 and Channel 2 have also increased their amount of broadcasting time in the 1980s.

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Their aggregate amount of broadcasting time in 1987 was around 5,500 hours.

### Cable TV

Cable television companies have been expanding vigorously in various parts of Finland throughout this decade. Today about 320,000 households, or slightly less than 20%, have access to some cable TV company. This means, for example, the facility to watch European satellite channels.

### Video

With the consolidation of equipment formats and with the rising standard of living, videotape recording has won a solid position in Finnish homes. Approximately 30% of households own videocassette recorders.

### Teletext

The Finnish Broadcasting Company commenced a teletext service in October 1981. In 1988 about 30% of households have the equipment for teletext viewing.

### Radio

Perhaps the most important influence on Finnish media-use habits has been the permitting of private commercial local radio stations from the middle of the current decade. Today, 30 different private radio stations operate in various parts of Finland.

At the same time the nationally-owned Finnish Broadcasting Company has substantially augmented its local services: the hours of such broadcasting have increased by as much as 740% since the beginning of the decade.

At the beginning of this decade the Technical Research Centre of Finland estimated that by the 1990's electronic communication would represent 23.4% of that part of the GNP which is expended on the mass communication media. The figure attained by 1985 was 22.5%.

In the development forecasts of the supply of mass communication there is often speculation about the relationship of the press and the electronic media. It has been predicted in some of the forecasts that the traditional press would fade away before the year 2000. But so far graphic communication has held its own very well during the era of the new electronic media.

### MEASURING MEDIA USE: INTERMEDIA STUDIES IN FINLAND

There are two different studies of media use at the intermedia level in the 80's in Finland:

(1) The Finnish Broadcasting company has collected 'Mediabarometer' data every year since 1984. This study is a rather small scale telephone interview, the sample size being about 1,500. It produces, primarily, data on the average daily reach of different media.

(2) Suomen Gallup and the Finnish Media Committee have organised two single-source intermedia studies in the 80's: one in 1985-86, and one in 1987-88. This survey is carried out in connection with the Finnish NRS. The sample includes 5,000 personal interviews.

The goal of this Intermedia Survey is:

(a) To give comprehensive information on the use of mass media in Finland, covering all advertising media.

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(b) To fill the gap in information about media groups, which is necessary when choosing the main media for a campaign.

(c) To give exact figures of the time spent by a target group on mass communication with respect to media groups.

(d) To follow up the increasing use of the new electronic media and to analyse the effects of the growing supply in the use of the 'conventional' mass media.

Table 1 shows the trend of the average daily reach of different media from 1984 to 1988. It

**Table 1**

#### Average daily reach % of different media

	1984	1985	1986	1987	1988
Newspapers	95	93	94	93	92
TV 1 & 2	79	84	79	83	89
Radio: national	62	67	69	67	72
General magazines	44	44	42	38	40
Cassette players	33	32	31	26	25
Books: fiction	31	30	28	29	28
Radio: state local	18	20	21	23	25
Radio: private local	18	16	17	11	12
Record players	18	15	15	10	10
Books: school	18	15	15	15	22
Video	5	9	10	10	12
Cable TV	3	3	3	5	6
Text TV	1	2	6	5	5
TV Channel 3				3	16
Home computers	-	1	2	3	5

Source: 1984-87 Media Barometer, Finnish Broadcasting Company  
1988 Suomen Gallup and Finnish Broadcasting Company

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is interesting to notice that both the Finnish Broadcasting Company's Mediabarometer and Gallup's Intermedia Survey give almost exactly the same results concerning the daily reach of different media (The question: did you use this medium yesterday?).

On the other hand, the results on the time spent daily with different media sometimes differ quite a lot between these two surveys, most of all because of the methodological differences in the time measuring technique.

### DISTRIBUTION OF OVERALL EXPENDITURE OF TIME

Table 2 shows the time spent daily with different media in 1985 and 1988.

The aggregate time expended on the mass media would seem to have grown substantially – 50 minutes – in the last part of the 1980's with the introduction of new media.

With forecasts and observations of the effects of the additional supply of new mass media in different countries, the effect of displacement has frequently been noted inside a single group of media. New TV channels, for example, displace the time expended on old channels. This is a development that has not materialised in Finland so far, at least on a large scale. New media seem to have boosted the 'time pool' available for the mass media. Only in the case of use of national radio can one see a small decrease, probably caused by the 'expansion' of the private local stations.

When a comparison is made of time-expenditure studies in Finland with international studies made in other industrial countries, two national characteristics emerge.

(1) Television in Finland has not yet attained even nearly the footing it has in people's time-

**Table 2**

#### Average time spent daily with different media in 1985 and 1988 (minutes)

	1985	1988
Newspapers	43.7	47.6
Magazines (1)	34.2	34.1
Direct mail (2)	3.9	5.6
Books (3)	19.4	26.1
TV 1 & 2	104.1	106.6
TV Channel 3 (4)	-	10.6
Cable TV	1.7	3.5
Video	7.5	9.6
Radio: national	106.0	105.1
Radio: local	23.2	45.2
Totals:	343.7	394.0

(1) Includes all kind of periodicals.

(2) Also includes free home distributed newspapers.

(3) The increase in 1988 is mostly caused by a different classification: books were then divided into fiction and non-fiction.

(4) Began in 1987.

expenditure in, for example, the United States, Britain or Japan. Television culture is clearly older in those countries than in ours while, on the other hand, the supply there clearly exceeds the quantity supplied in Finland.

(2) Another particularly Finnish characteristic is the strong position of the press – the newspapers and magazines. In fact, the Finnish

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'woodsman culture of withdrawal into silence' has been called a favourable growing ground for reading. But one thing is certain, and that is that the new growing television and video-generations will change that situation.

### MEDIA USE CHANGES IN DIFFERENT LIFE-STAGES

The angle of examination here is the stage in the life situation of individuals: whether they are living in their own home or with their parents, whether they have children at home, what kind of work they do, what the income level is. The various groups are defined in Table 3.

Table 4 shows the changes between 1985 and 1988 in the time spent with different media in the different life stage categories.

#### (1) All media

Prefamily groups and the older target groups are the heavy users of the media. The most substantial increase in total time spent with media has taken place in Prefamily/minus, and in Late/minus groups.

#### (2) Newspapers

The time spent with newspapers increases among the older target groups. The most significant increase is among retired people.

#### (3) Magazines

Decrease in Family Blue Collar/minus group and increase in Late and Retired/minus groups.

#### (4) Direct mail

Has increased its influence in all groups.

#### (5) Books

The dramatic increase in the time spent with books in the younger target groups is mostly caused by the new classification and the breaking out of 'school' books (earlier the group was only 'books').

#### (6) TV 1 & 2

The only big change in the use of the 'old' TV channels is the decrease in the Dependent/plus group.

#### (7) TV 3

The new Channel 3 has the most enthusiastic fans in the Dependent/minus, Prefamily/plus and Later/minus groups.

#### (8) Cable TV

Cable TV has increased its influence dramatically among younger people.

#### (9) Video

Newspapers are the media of the older age groups, so video is the medium of the younger age groups. The most dramatic increase is the Prefamily/plus group.

#### (10) Radio national

No big changes.

#### (11) Radio local

The increase has occurred mostly because of the new private commercial radio stations: expansion in almost all categories.

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Table 3

## Classification of life-stage

Group	Description	Percentage of the 12 + population
Dependent/minus (DEP-)	Persons under 35 living in the households of their parents Gross annual income of household below FIM 125,000,-	5
Dependent/plus (DEP+)	Same as above, but gross annual income of household above FIM 125,000,-	5
Prefamily/minus (PRE-)	Persons under 30 living in own household without children; gross annual income below FIM 100,000,-	7
Prefamily/plus (PRE+)	Same as above but gross annual income above FIM 100,000;	5
Family blue/minus (FBC-)	Persons over 18 who have children of their own at home and who belong to the working population or the farming population; gross annual income below FIM 100,000,-	8
Family blue/plus (FBC+)	Same as above but gross annual income above FIM 100,000,-	12
Family white/minus (FWC-)	Over 18 with own children at home, staff or in leading position; gross annual income below FIM 150,000,-	10
Family white/plus (FWC+)	Same as above but gross annual income above FIM 150,000,-	8
Late/minus (LAT-)	Over 35 without children at home and neither students nor pensioners; gross annual income below FIM 100,000,-	11
Late/plus (LAT+)	Same as above but gross annual income above FIM 100,000,-	8
Retired/minus (RET-)	Pensioners, gross annual income below FIM 50,000,-	9
Retired/plus (RET+)	Pensioners, gross annual income above FIM 50,000,-	12

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**Table 4 Average time spent in different life stage categories in 1985 and 1988 (minutes)**

	Dep-	Dep+	Pre-	Pre +	Fbc-	Fbc +	Fwc-	Fwc +	Late-	Late +	Ret-	Ret +
<b>1 Total Use</b>												
1985	257.4	294.1	370.4	318.1	365.8	362.7	342	307.6	369.2	348	363.8	428.3
1988	306.8	284.5	400.3	416.5	374.3	406.6	349.2	355.3	447.2	409.3	418.4	457.3
<b>2 Newspapers</b>												
1985	21.8	28.7	36.5	43.4	37.9	44.7	45.3	41.7	51.8	56.0	48.6	63.0
1988	24.0	30.4	36.2	46.6	40.6	44.0	40.1	46.2	52.7	56.3	59.8	69.7
<b>3 Magazines</b>												
1985	34.7	42.9	36.8	31.0	31.8	39.0	33.3	34.8	31.2	33.1	33.5	40.1
1988	28.6	41.1	33.0	31.7	26.0	29.1	29.3	37.7	36.8	38.9	38.9	37.4
<b>4 Direct mail</b>												
1985	2.1	2.8	3.3	2.3	4.7	3.8	3.0	4.1	4.5	3.9	4.9	5.1
1988	2.9	6.0	4.4	4.7	5.3	4.3	4.6	6.1	5.9	5.6	8.7	8.2
<b>5 Books</b>												
1985	27.3	33.3	29.4	15.3	14.5	12.9	22.7	21.1	15.8	18.3	18.0	26.0
1988	49.1	61.1	56.6	27.1	12	18.9	18.1	30.0	18.8	20.3	16.7	22.4
<b>6 TV 1 &amp; 2</b>												
1985	98.6	96.2	94.6	90.8	106.1	101.6	98.1	81.9	117.6	102.3	121.9	132.9
1988	97.7	71.7	89.8	95.1	98.9	108.9	99.1	82.6	128.9	111.1	129.3	138.8
<b>7 TV 3 1985*</b>												
1988	20.6	9.0	9.5	18.4	4.5	8.5	8.4	11.2	13.5	10.7	4.9	11.4
<b>8 Cable TV</b>												
1985	1.9	3.7	3.5	1.5	0.9	1.4	1.9	3.1	1.2	2.4	1.1	0.9
1988	10.0	6.9	6.2	7.2	1.5	2.2	1.6	3.0	1.4	2.1	0.7	1.3
<b>9 Video</b>												
1985	16.8	19.4	12.4	13.4	11.7	8.9	6.9	7.1	1.2	3.6	0.4	3.5
1988	19.7	13.1	11.1	17.4	11.0	12.9	9.6	9.0	3.2	7.0	1.2	2.4
<b>10 Radio national</b>												
1985	42.8	53.0	112.9	90.5	136.6	127.3	104.4	85.8	120.2	104.2	117.9	138.1
1988	32.1	31.9	79.7	103.5	135.6	126.6	92.8	80.0	141.1	114.2	121.4	127.3
<b>11 Radio local</b>												
1985	11.4	14.1	41.0	29.9	21.6	23.1	26.4	28.0	25.7	24.2	17.5	18.7
1988	22.1	13.3	73.8	64.8	38.9	51.9	45.6	49.5	44.9	43.1	36.8	38.4

\* TV 3 started 1987