Finnish Mass Media
1999

Tilastokeskus
Statistikcentralen
Statistics Finland

STV

Kulttuuri ja viestintä 1999:1
Kultur och massmedier
Culture and the media

Finnish Mass Media

1999

Helsinki 1999

Inquiries:

Tuomo Sauri
Tel. +358-9-1734 3449

Rauli Kohvakka
Tel. +358-9-1734 3448

tuomo.sauri@stat.fi
rauli.kohvakka@stat.fi

FIN-00022 Statistics Finland

SVT — *Suomen virallinen tilasto*
Finlands officiella statistik
Official Statistics of Finland

Cover design: Ilkka Kärkkäinen

ISSN 0784-8765
Culture and the Media
ISSN 1455-9447
ISBN 951-727-608-7

Key to symbols used in Tables

No information....................	–
Quantity less than half the unit used..............	*0 ja 0,0*
Data not available or sufficiently reliable............	..

Hakapaino Oy, Helsinki 1999

Preface

Finnish Mass Media is the seventh volume in Statistics Finland's series of comprehensive statistical compendia on the mass media sector in Finland. Like all previous reports in the series, it is very much a product of cooperation: Statistics Finland has worked closely with the Ministry of Transport and Communications to produce reliable data on the development of mass communication since 1985. Since the early 1990s the Ministry of Education has also been actively involved.

Finnish Mass Media is a fully updated and revised edition of Joukkoviestimet 1998, in Finnish. In addition to the seven comprehensive statistical overviews on mass communication, several other reports have been published within this project on different aspects of the media field.

Finnish Mass Media was compiled and edited by Rauli Kohvakka and Tuomo Sauri (responsible editor), who also wrote the overview articles of the report. The Tables and Figures were compiled by Irma Ollila; the layout is by Seija Töyräänvuori; and the translation into English by David Kivinen.

The article on Finnish web publications is by Päivi Kuusisto, who is currently working for the City of Tampere as Internet information coordinator. Statistics Finland wishes to thank her for an interesting contribution.

Helsinki, April 1999

Risto Lehtonen

Contents

Introduction: the changing mass media scene in Finland

Finland's per capita consumption of print media has long been one of the highest in the world. Although newspapers saw their circulation decline quite rapidly with the severe economic recession in the early 1990s, Finland still has one of the world's highest newspaper circulation and number of book titles relative to its population of 5.2 million. Finnish people are also quite avid readers whose reading habits have remained largely unaffected by the continuing expansion of the electronic media – at least for the time being. The strong position of the print media is also reflected in the turnover statistics for the mass media and the breakdown of advertising expenditure by different media categories: the print media still account for 70 per cent of the total.

On the other hand, the field of electronic media has seen many major structural changes during the past ten years or so, in spite of the economic recession. The first licences for local commercial radio stations were issued in 1985, and over the next few years new stations mushroomed all over the country. The television scene changed decisively with the 1993 channel reform which saw the separation of public-service (YLE TV1 & TV2) and private broadcasting (MTV3 Finland) onto their own channels. From its early beginnings until 1993, the Finnish system had been quite exceptional with its undogmatic collaboration between public and private television services. The commercial operator MTV Finland had broadcast its programmes under the public service YLE´s operating licence and rented air time slots on YLE´s two channels, providing about one-fifth of the supply of TV1 and TV2, thus making the Finnish model truly "mixed".

In 1996 the government issued an operating licence for a fourth nationwide (commercial) channel. Channel Four Finland started programming in June 1997. One of the main challenges to the fourth channel will be to share with YLE and MTV the costs of setting up a terrestrial digital TV network.

There are now plans to set up in Finland three terrestrial digital television networks or multiplexes that will carry a dozen or so channels (including the current four nationwide channels) as well as a range of interactive services. Initially the launch of digital programming for the general public has been scheduled for the Olympic Games in the year 2000. The total costs of building the digital networks are estimated at around FIM 0.5 billion. Programme production costs are expected to total some FIM 650 million a year, while the costs of interactive services during 1999–2002 will be around FIM 0.5 billion. Households will be spending an estimated FIM 2–3 billion in the necessary hardware; this figure is based on estimates of the costs of set-top boxes. The price of digital television receivers proper will obviously be much higher, even several times higher. The sums involved are quite considerable. For instance, in 1997 the turnover of nationwide television broadcasting was around FIM two billion, the value of sales of television sets was FIM 800 million. For the time being there remain many unanswered questions with regard to financing digitalization; with regard to some technical solutions, such as the standardization of set-top boxes; and with regard to the interest of consumers in the new channels and services and in purchasing the necessary hardware. Indeed the Government has been called upon to look into the move to digital television and radio so that its costs to consumers can be minimized.

In 1996 an operating licence was also granted to the first nationwide commercial radio channel alongside the four existing public-service channels. Radio Nova went on the air in 1997. From the very outset the new channel has represented serious competition for commercial local radio stations, many of which have been struggling financially ever since the onset of the recession.

Economy

Statistics on the turnover of the Finnish mass media during the 1980s attested 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 per cent of the country's GNP.

The electronic media have been growing faster than the competition: in ten years the print media have lost six percentage points of their market share to the electronic media. Nonetheless the print media (newspapers and magazines, books, printed advertising material) are still way ahead, representing 70 per cent of the sector's turnover.

With the onset of the deep recession in the early 1990s, the turnover of the mass media in Finland began to decline. The print media were more badly affected than the electronic media. The latter continued to increase their relative share of the mass media business.

Since 1994 the situation has improved considerably, both for the national economy as a whole and for the mass media. During the past couple of years the mass media industry has grown at a rate of around five per cent per annum. In 1997 its turnover stood at FIM 18.4 billion, or ECU 3.1 billion.

The development of the print media

Finland is traditionally a land of newspapers. In 1998 a total of 220 newspaper titles were published in the country, 56 of these being dailies. Circulation and coverage statistics are still quite impressive, in spite of the impacts of the recession. However, as newspapers are heavily dependent on revenues from advertising, they were bound to be affected when companies decided to cut their advertising budgets. Even so newspapers still account for about 30 per cent of the turnover in the mass media sector, showing a decrease of no more than a couple of percentage points during the 1990s. This is not very much when considered against the dramatic changes in newspapers' main sources of revenue and circulation figures. Today just over half of newspapers' revenues come from the sale of advertising space, at the beginning of the 1990s the proportion was in excess of 70 per cent.

The total circulation of Finnish newspapers started to decline in the early 1990s, for the first time since World War II. Several newspapers have even been closed down altogether, and circulation figures have been dropping across the board. Between 1990 and 1998, the total circulation of newspapers declined by 18 per cent. However, the circulation of Finnish newspapers still ranks among the highest in the world. Calculated per 1,000 population, the circulation of Finnish dailies, for example, is third only to Norway and Japan.

In advertising terms, too, newspapers continue to dominate the Finnish media market, even though they have lost some 10 per cent of their share of the advertising cake during the 1990s. Newspapers still account for over 50 per cent of media advertising in Finland, while the average figure for the whole of Europe in 1996 was 40 per cent.

One trend that may be expected to continue is the formation of newspaper chains. As a result of company takeovers and mergers the market shares of the biggest newspaper houses (as measured in terms of circulation) have started to grow. For instance, the market share of the four biggest publishers has increased from 31 per cent in the mid-1980s to 48 per cent in 1998; the corresponding figures for the top eight companies are from 43 per cent to 61 per cent.

Both of the two biggest newspaper groups in Finland are major multimedia companies. In spring 1999 the country's biggest newspaper house Sanoma, the biggest book publisher WSOY and the second biggest magazine company Helsinki Media (which is also the biggest shareholder in Channel Four Finland) merged to form a company called Sanoma - WSOY. Sanoma - WSOY publishes Helsingin Sanomat, the biggest daily in Finland; Ilta-Sanomat, the biggest afternoon tabloid; and also a nationwide business newspaper in Helsinki. Also, since spring 1999, it is the sole owner of a major chain in regional and local newspapers in northeastern Finland. In spring 1999 Sanoma - WSOY accounted for an estimated 25% of the total newspaper circulation in Fnland. Alma Media publishes Aamulehti, a major regional daily in Tampere; the business newspaper Kauppalehti; and the afternoon tabloid Iltalehti in Helsinki. In addition, Alma Media is the majority shareholder in or the sole proprietor of 19 other newspapers. In early 1999, after its most recent acquisitions, it accounted for around 17 % of the total circulation of newspapers. Alma Media was created in spring 1998 through the merger of the major newspaper publisher Aamulehti Group and the leading commercial TV channel MTV3 Finland. Alma Media is also the biggest single shareholder in the country's only nationwide commercial radio channel, Radio Nova, which was launched in spring 1997.

There is a clear trend towards closer editorial cooperation both within newspaper chains and even between independent newspapers and newspaper houses. This sort of cooperation is bound to lead to a convergence in terms of newspaper contents, but as far as the individual consumer is concerned there is a definite plus side to the trend: it will probably mean greater diversity in the content of one's own newspaper.

Another significant development has been the rapid growth of tabloids. There are two national "afternoon" tabloids in the country, although both have now started to appear in the news-stands early in the morning. Their combined circulation of some 330 000 copies has increased by some 80 000 copies compared with the mid-1980s. One further noteworthy structural development is the decline of "second" newspapers, i.e. smaller papers in towns with at least two newspapers.

In terms of economic volume, magazines and periodicals represent the second biggest category in the Finnish mass media sector. Magazines and periodicals are dependent on advertising to a far lesser extent than newspapers. However, in recent years the share of magazine advertising has begun to grow, and the difference compared with the average Western European level has been reduced. Nonetheless in 1997 advertising in magazines and periodicals accounted for no more than 15 per cent of total media advertising, around four percentage points less than in European countries on average.

Finland is one of the few countries in Europe where the delivery of newspapers and periodicals is based primarily on subscriptions. It is estimated that almost 80 per cent of magazine and up to 90 per cent of newspaper sales are based on subscriptions and are delivered to the consumer's door.

The eight major publishers of magazines and periodicals account for some 80 per cent of the total volume of consumer magazines and for around 30 per cent of the total output in the periodical press (the total number of consumer magazines, business magazines, customer magazines and opinion journals published in Finland adds up to some 2,700 titles). Finland's three biggest magazine publishers are Yhtyneet Kuvalehdet, Helsinki Media Company and A-lehdet. Following ownership rearrangements in 1998, Yhtyneet Kuvalehdet is now a subsidiary of Otava, Finland's second-biggest book publisher. Helsinki Media Company is in turn part of Sanoma - WSOY, whereas A-lehdet is an independent family-owned company which for the time being is involved in no other mass media sectors.

All three biggest publishers remain in domestic ownership. At the same time, however, a number of major Scandinavian publishers (Aller, Bonnier, ICA) have established a firm position in the marketplace. Despite the language barrier, cross-cultural exchange seems to be fairly fluent. On the other hand, some Finnish magazine publishers, perhaps most clearly the Helsinki Media Company and Yhtyneet Kuvalehdet, have been taking steps towards internationalization in various forms. In addition, many special-interest magazines have established forms of editorial cooperation with corresponding magazines published in other countries.

Book publishing has been the third biggest segment of the print media business in Finland. During the years of recession sales were severely affected by forced decisions in schools and libraries to cut back on acquisitions. Since the mid-1990s, however, book publishing has been doing reasonably well. Statistics on the number of book titles relative to population show that Finland has retained its position among the leading countries in the world; Iceland is way ahead of the rest of the field in this table, other high-ranking countries apart Finland include Denmark, Holland and Switzerland. In 1997 a total of almost 12 000 book titles were published in Finland, twice as many as in the early 1980s. At least in the light of this evidence it seems that the growth of electronic communication has had no adverse impacts on book publishing. Most of the titles are published by companies and organizations whose main line of business is some other than book publishing (e.g. public administration, universities). However, publishing houses proper still account for the bulk of the volume of book sales.

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.

Finland has a very extensive network of public libraries and in spite of the financial difficulties experienced in the 1990s, they still provide a good service. The use of libraries has continually increased. In 1997 a total of just over 100 million lendings were made from public libraries, which translated into around 16 books and four other items (audio cassettes, videos) per capita. In the same year around 2.5 million people in Finland, roughly half of the population, used the services of public libraries. All in all libraries are a very significant channel of book distribution in Finland. In fact, the number of books borrowed per year currently exceeds the annual sales of members of The Finnish Book Publishers' Association more than three times over.

Electronic media

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 VCRs 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 the mixed system of public service and commercial television in Finland – as well as its financial basis. As a consequence the Finnish Broadcasting Company YLE and MTV Finland intensified their cooperation and even joined forces to start up in 1987 a third, commercially financed television channel, Kolmostelevisio, which broadcast until the end of 1992.

Since the beginning of regular television broadcasting in Finland in 1957, the commercial television station MTV had to lease its broadcasting time from the public service broadcaster YLE on the latter's 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 also been a major source of funding for YLE in addition to licence fees.

At the beginning of 1993 the public service operator YLE and the commercial MTV parted ways. Both 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, with its own operating licence. But even today, a very substantial part of MTV3's revenues goes to YLE in the form of a network leasing fee and the so-called public service fee. (The payments accounted for 20 per cent of YLE's turnover and for over 40 per cent of MTV3's turnover in 1996.) The latter fee, renamed as an operating licence fee, was made statutory as from the beginning of 1999 and was extended to apply to all television (as from 1999) and radio broadcasting (as from 2004) over the air.

Following the channel reform, with no technical obstacles to contend with, there was no real excuse any more for declining to grant an operating licence to a fourth (commercial) television channel that would compete with MTV for advertising money. Therefore in 1996 the government granted an operating licence for a fourth nationwide channel: Channel Four Finland (Nelonen) started programming in June 1997. The operating licence was issued to a company of which Helsinki Media Company (Sanoma - WSOY) owns just over half. Other shareholders include a few domestic independent television production companies, a newspaper chain, and with a 25% ownership, Egmont, Denmark's biggest communications company. Egmont also owns one-third of the Norwegian commercial nationwide TV network TV2.

In 1998 Channel Four still accounted for no more than 7 per cent of total television viewing time; the corresponding figures for MTV, the market leader in commercial television, was 42 per cent, for YLE with its two channels 46 per cent.

In the late 1980s cable television networks were expanding at a rate of approximately 100 000 new subscribers per annum. During the 1990s things have been moving much more slowly. Overall the role of cable and satellite channels has been much less significant than in the other Scandinavian countries. The primary reason has been the scarce supply of programming in the Finnish language. At the moment the supply is limited to a few pay-tv channels and one sports channel. In contrast to the other Scandinavian countries, Finland has not seen any full-service satellite channels dedicated to the local audience of this country. Cable networks have largely served as distribution networks for pan-European channels such as MTV Europe, Eurosport, and TV5.

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 severely affected local radio stations.

Although a total of some 30 local radio stations closed down and merged with other stations during 1990–1998, new companies have sprung up in their place so that the total number of local radio stations has remained more or less unchanged. At the end of 1998 there were a total of 58 local radio stations in the country. In addition, the format radios Kiss FM (owned by SBS) and Classic FM (owned by GWR), both operating in several cities and, in spring 1997, Radio Nova, the first nationwide commercial radio channel, have entered the commercial radio market. The competition is fiercest in the Helsinki metropolitan region where there are now ten or so radio stations that are commercially financed.

The start-up of Radio Nova (in which Alma Media is the biggest single shareholder) has been a great success. At year-end 1997, i.e. after the first nine months on the air, its channel share in its primary target groups (the audience aged 25–44) was one-quarter of the listeners. The losses have been felt equally by YLE's public service radio channels and by local radio stations.

YLE has public service radio broadcasting on four nationwide channels plus extensive regional radio services. In addition, YLE has started digital radio broadcasting in autumn 1998. The programming for the digital talk radio channel Radio Peili ("Radio Mirror") is compiled from the programmes broadcast by YLE on its analogue nationwide channels. For the time being the channel also broadcasts in analogue format in parts of southern Finland.

Television's share of the advertising cake remained small until the end of the 1980s. However, during the recession its share began to grow very rapidly, while the print media were to suffer most from the effects of the recession. In recent years, however, the share of television has remained steadily at 21 per cent of media advertising. This is a fairly small market share compared with the Western European average (30 per cent in 1996). The share of commercial local radio stations in media advertising has been on the decline in the 1990s. During the past few years it has remained at 3.5 per cent.

Online information services, most of which are business-to-business information services, showed rapid growth during the late 1980s, and the trend continued until the mid-1990s. In recent years, however, this growth has slowed down. As far as services intended for consumers are concerned, the demand for fee-based online services is still marginal, and at least for the time being it seems very difficult for operators to collect money for these kinds of services. As for Internet advertising, in 1998 it accounted for less than half a per cent of total media advertising.

Recorded media

Phonograms and videos have long accounted for around 6–7 per cent of the mass media sector, but it seems that their share has now started to grow. The phonogram markets have grown quite rapidly during the past couple of years. However, a major new threat to this growth is represented by pirating, which is a booming business just across the border in the Baltic and St. Petersburg regions. Not only top-selling international artists but also domestic performers have now become victims of the pirating business.

In 1997 the five major multinational labels BMG, EMI, Polygram, Sony, and Warner together accounted for just under 60 per cent of total phonogram sales in Finland.

The video markets are divided into two segments, i.e. video rentals and sell-through. The market shares of these two segments have virtually been turned upside down during the 1990s. At the beginning of the decade sell-through videos accounted for less than one-quarter of the total markets, during the past couple of years their share has been slightly below 70 per cent. In the past couple of years the turnover of video rentals has also shown some growth after several years of stagnation and decline. The rental market has obviously benefited from the lowered price levels: it is estimated that within the past few years the average rental prices have dropped by around one-quarter.

Most videos are of American origin; domestic products account for only a small proportion of the rental and sell-through markets. The market is dominated by four distributors: Finnkino (owned by a subsidiary of Sanoma - WSOY), Buena Vista, Egmont Entertainment and Warner Home Entertainment. Together, these four account for almost 90 per cent of the video markets.

However, time-shifting or the viewing of programmes recorded from television is far more common than viewing sell-through or rental videos. In 1998, three-quarters of total video viewing time was spent on viewing programmes recorded from television.

In 1997 CD-ROMs still accounted for no more than FIM 200 million or about one per cent of the turnover of the mass media in Finland. During the past couple of years market growth has been somewhat slower than expected. As far as CD-ROM games are concerned this is often explained by the revival of playstations as well as by pirating. As regards multimedia CD-ROMs, it seems that growth is hampered by two major factors, i.e. pirating and free and ready access to high-quality encyclopaedic material on the Internet.

In the 1980s and early 1990s the film industry in Finland suffered serious setbacks as other mass media continued to grow and expand. In the 1980s, the main challenge came from video and television. In this situation of stiffening competition, the number of cinema admissions steadily declined. At the same time the number of cinemas declined sharply as theatres with one and two screens were closed down and multiscreen cinemas were opened. The number of films shown also dropped very clearly, although there has been no real change in the annual number of premieres. In 1995 Finns went to the cinema no more than approximately once a year per person, but during the past couple of years it seems that the trend has been reversed. In 1998 the number of cinema admissions was 1.5 per capita. The biggest cinema chains in the country have recently started renovation projects aimed at raising the quality standards of cinemas, and it is believed that the new huge multiplex theatres with their sophisticated technology and additional services will provide another major boost to cinema-going.

Tuomo Sauri

Finnish web publications

Finland has the world's highest per capita density of Internet connections. Web publishing is also at a high level, with a large number of small media companies involved in spite of the fact that the business is still running at a loss. Advertisers are not willing to spend their money on other than the biggest pages, and readers are not willing to pay for web publications. Most Internet publications are therefore compiled on limited budgets using existing materials published by a news agency or in the company's own newspaper or radio or television programme. It is still quite rarely that one finds fresh articles on the net specifically produced for this medium.

This chapter provides some background information on the use of computers and the Internet in Finland; reviews some of the most popular web addresses and Internet publications; and briefly describes the pages of Finnish organizations and associations in mass communication.

Home computers for work and study

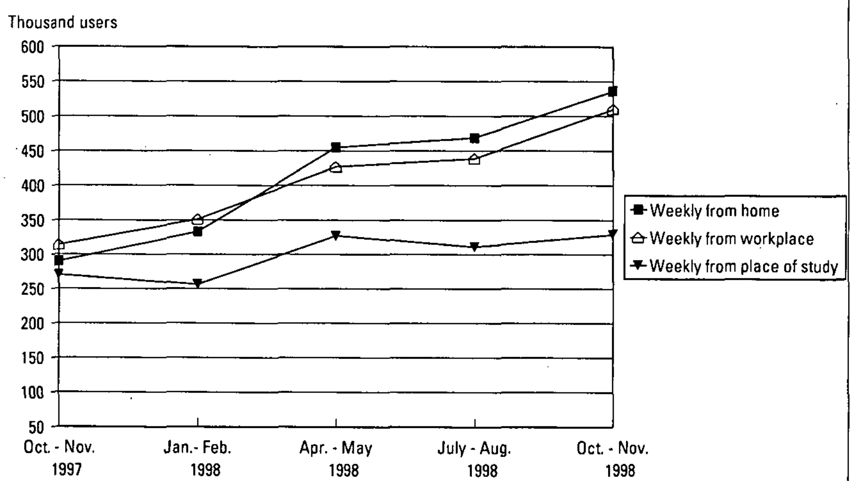
Consumer surveys show that Finnish people generally buy computers for purposes of work and study (Turpeinen 1998, 52). The main reason for taking out an Internet subscription is that people want to keep up with what is happening around them and to make their life easier by using e-mail and online banking services (ibid., 53). People who have experience of the Internet mainly use it for purposes of searching information (87%) and for e-mail (70%). Other items indicated from the preset list included retrieving data files (65%), occasional surfing (60%), following news events (60%) and entertainment (magazines, music, etc.; 47%) (Rissa & Järvinen 1997). User surveys conducted by web papers have shown that Finnish readers are mainly interested in local news, advertisements and events calendars (Ilkas 1997, 9).

Since the end of 1995 Finland has had the world's highest per capita number of host computers connected to the Internet. In July 1998, the number of hosts per 1 000 population was over 100; in practice this means one host connected to the Internet per ten persons. The second highest figure in the world (excepting some non-independent islands) was recorded for Iceland (77), the United States (73, estimate), and Norway (72 hosts per 1 000 population) (c.f. http://www.tieke.fi/tietopal/tilasto/nwhpa.htm).

In Finland the costs of an Internet subscription have recently fallen quite sharply. Operators usually charge a connection fee and a monthly fee, which is nowadays usually fixed and not dependent on the amount of time spent on the Internet. On top of this the user obviously has to pay for the local phonecall. Setup costs are in the region of FIM 150, the fixed monthly fee is around FIM 50. The cost of a local phone call after business hours in Helsinki, for example, is 47 p/call and after half an hour 5.5 p/minute. This means that users who spend one hour a day on the Internet pay around FIM 115 per month.

Nearly 40 per cent of Finnish households have a home computer and around one fifth have an internet connection (see figure 1 in chapter 10 of this publication). In October-November 1998, over one fourth of the population aged 15–74 (1 087 000) used the Internet at least once a week at home, at their place of study or in the workplace, while some 15% (504 000) said they used the Internet on a daily basis. The Internet is now used more often at home than in the workplace or place of study. The number of home users has nearly doubled within the space of one year (Figure 1). On the other hand, computers are increasingly used outside the home. The combined weekly number of people accessing the Internet at their place of study or in the workplace was 839 000, the weekly number of home users was 536 000.

Figure 1. Changes in the place of Internet use from October-November 1997 to October-November 1998



Source: Taloustutkimus, Internet Tracking 1998

In the home, computer use is not evenly divided among all family members. The most active users today appear to be young men in small households as well as children and young people in family households. (Nurmela 1998, 97.) Home computer ownership is highest among 30-year-old men who live alone, among couples of the same age and in families with children who are at school or studying. More than half of boys aged 10–14 use the home computer on a daily basis, among men aged 15–29 two-fifths are daily users. Adult women who have a family use computers less often than women in households with one or two people. (Ibid., 90.)

Young men in the age group 20–30 are the most frequent users of information networks (ibid., 91). Computer use in the workplace significantly reduces the gender inequality that characterizes home use: women have access to a computer in the workplace more often than men, though on the other hand the computer skills they learn at work tend to be rather limited and do not necessarily inspire independent use and surfing on the net (ibid., 95).

Popular Finnish web publications

A total of some 170 journalistic web publications are published regularly in Finland (see table 7 in chapter 10 of this publication). These include both publications of large media houses and smaller alternative publications. Almost all large media companies have their own web pages.

The research agency Taloustutkimus measured the popularity of more than 50 Finnish homepages by asking respondents which WWW services they had visited at least sometimes. The most popular producer of web contents was the commercially financed television channel MTV3, whose Internet pages had been visited by half of all the respondents. The top ten list of most popular services includes, among others, search engines and homepages of service providers (Table 1).

As well as measuring how well people know different homepages, Taloustutkimus carries out regular Web Traffic Monitor measurements to rate the popularity of almost 40 Finnish services. Half of the pages monitored contain journalistic material. The reports published include average weekly figures for page impressions, visits and different visitors. (Table 2)

In addition to publications intended for the general public, there are also various online news services on the web designed specifically for companies. One of the biggest services is run by the news agency Startel (http://www.startel.fi), which specializes in real-time economic news. It operates a fee-based EXPR database, which includes financial news from 1991 onwards. The Finnish News Agency (STT), Alma Media Interactive and Talentum News Desk are among the providers of general online news services.

Table 1. The most popular web pages in alphabetical order (Autumn 1998)

Name of service	Description
Altavista (Finnish)	Search engine
Eemeli	Search for Finnish e-mail addresses.
Ihmemaan Haku	Search from Finnish servers, Yellow Pages and atlas. Short news bulletins from Finland and abroad, weather reports.
Iltalehti	News stories from the printed afternoon tabloid.
Ilta-Sanomat	Some news stories from the printed afternoon tabloid
iNET Keskuskatu (Sonera)	Web pages of Internet service provider, including short news bulletins, search from Finnish pages and list of links.
Keltainen Pörssi	Electronic version of a classified advertisements paper. Fee charged for browsing latest issues.
Kolumbus (Finnet Group)	Web pages of Internet service provider; including links to the news of Iltalehti, MTV3, Kauppalehti (business news) and Tietokonelehti (computer magazine).
MTV3	Web pages of commercial television channel including round-the-clock news service as well as sound and videoclips from television news. Teletext. Archive search by word or date (from June 1996 onwards). Programme pages.
Yleisradio	The pages of the Finnish Broadcasting Company include news flashes with still pictures from television news. Teletext, also in Swedish. Sound and videoclips from Swedish news. Audioclips from previously broadcast radio news and excerpts from some other radio programmes as well as News in English. TV and radio programme pages.

Source: Taloustutkimus, Top ten WWW homepages, November 1998

Table 2. Average figures for weekly visits 31 Aug 1998 – 27 Sept 1998. The figures are weekly averages.

Page impressions (Total number of all page impressions; weekly average)		Visits (Visits to the service; independent of the page/pages visited; weekly average)	
KissFM	3 473 700	iNET Keskuskatu	608 900
iNET Keskuskatu	2 853 200	MTV3	260 600
MTV3	1 768 500	Ihmemaan Haku	191 800
Ihmemaan Haku	1 403 300	KissFM	150 600
YLE	839 400	YLE	102 900
Mikrobitti	542 800	Mikrobitti	48 500
HS Verkkoliite	454 400	HS Verkkoliite	46 400
Virtahepo	129 300	Tietokone-lehti	26 100
Taloussanomat	111 600	Pelit	16 200
Tietokone-lehti	99 700	Taloussanomat	14 800
Telefinder	61 700	Virtahepo	13 000
Pelit	52 800	Tietokonemaailma	11 700

Source: Taloustutkimus, Web Traffic Monitor, September 1998

Web publishing by major media companies

Web publishing in Finland is dominated by the country's two biggest media companies, Sanoma - WSOY and Alma Media, the latter of which is partly in Swedish ownership. Sanoma - WSOY publishes Helsingin Sanomat, whose weekday circulation in 1998 was 473 000. Helsingin Sanomat has published a web supplement (*Verkkoliite*) since 1996, but access is restricted to subscribers of the daily paper version. The supplement contains much of the same news material that is published in the paper version, but pieces are also written specially for the web version. Once a month the supplement includes a special package (*Klik!*) which makes extensive use of visual and audio material as well as of interactivity. For example, in the September 1998 supplement 'Deadline' predicted users' life-expectancy and probable date of death on the basis of the information they entered on their age, sex, and details concerning smoking and drinking habits, etc. The supplement features a word search from archives, which include all the material published in the supplement since May 1996. In addition to the current issues covered, Verkkoliite offers some services (such as a guide for people moving into Helsinki) that are accessible to all Internet users. The same applies to classified advertisements on houses, cars and job vacancies, which can also be searched.

The web pages of the commercial television channel MTV3, which is owned by Alma Media, advertise themselves as the most popular web address in Finland. The pages include news material which is updated round-the-clock, and news stories produced by MTV3 are featured complete with video and audioclips from news broadcasts. Visitors can also access MTV3's Internet archives using word or date searches. The archives go back to June 1996. There are games and hobby packages (motorcars, boating, formula, horseback riding), which include stories as well as for-sale and wanted columns. MTV3's basic pages can be accessed without registering, but entry into the pages of the youth programme 'Jyrki' does require registration. These latter pages feature competitions and chat channels. The most popular chat channel for young people in Finland is KissFM, which features the homepages of the youth radio station chain owned by Scandinavian Broadcasting System and which also gives access to the station's broadcasts in RealAudio format.

The web pages of the provincial daily Aamulehti, which is owned by Alma Media, include not only daily news from the paper but also provide space for various communities and societies operating in Tampere (where Aamulehti is published). Among the organizations that have made use of this space are the town's ice hockey clubs and a volunteer organization providing social services for the frail elderly.

Alma Media's Kauppalehti Online concentrates on financial news and is provided for the main part on a fee basis. Online news, the news archives, and stock exchange notifications are accessible only to subscribers of the paper version, but all the services can be paid for separately. The web pages of Talousanomat (owned by

Sanoma - WSOY), the main rival of Kauppalehti which was launched in 1997, are (at least for the time being) free of charge. These pages include an English language news service 'News in brief'.

Alma Media's Iltalehti, the second biggest afternoon tabloid in Finland, publishes nearly all of its news material on the net, except for its weekend issue. The web pages of the biggest afternoon tabloid, Sanoma - WSOY Group's Ilta-Sanomat, do not as yet include any other material than short excerpts from its daily content.

The pages of the public-service broadcaster YLE introduce the company's television and radio programming, but also include news flashes and still pictures from television programmes. Excerpts from Swedish-language news also include video and audioclips. Teletext services are available in full on the Internet, in both Finnish and Swedish. It is also possible to listen to audioclips of radio news that have been broadcast earlier, excerpts from a few other radio programmes, as well as a news bulletin in Finnish, Swedish, English, German, French, and Russian. There is also a weekly current affairs bulletin in Latin (Nuntii Latini). Information on YLE and its audience is also available in English.

On the commercial side, Sanoma - WSOY and Alma Media have a serious competitor in Talentum, which publishes magazines in such fields as business, marketing and computers. Talentum has launched a net service intended specially for marketing, advertising and computer professionals (Duuni.net). A total of some 18 000 registered users have subscribed. In addition to online news, the pages contain articles produced by the members of the community and some twenty active chat groups.

Web addresses of the services mentioned in the above chapter:

Verkkoliite of Helsingin Sanomat	<http://www.helsinginsanomat.fi/>
'Deadline' article in Verkkoliite of Helsingin Sanomat	<http://www.helsinginsanomat.fi/klik/deadline98/>
MTV3	<http://www.mtv3.fi/>
Jyrki.com	<http://jyrki.com/>
Kiss FM	<http://www.kiss.fi/>
Aamulehti	<http://www.aamulehti.fi/>
Kauppalehti	<http://kauppalehti.fi/>
Taloussanomat	<http://www.taloussanomat.fi/>
Iltalehti	<http://www.iltalehti.fi/>
Ilta-Sanomat	<http://www.iltasanomat.fi/>
YLE (English pages)	<http://www.yle.fi/fbc/>
Nuntii Latini	<http://www.yle.fi/fbc/latini/>
Duuni.net	<http://www.duuni.net/>

English web pages of media organizations

On their web pages most Finnish media organizations and associations provide news and background on their own operation and on the media field in general not only in Finnish but also (at least in part) in English.

The web pages of the Finnish Periodical Publishers' Association contain basic information on Finnish periodicals in pdf format. The databases include information on the number of periodicals, their circulations and number of readers. There is also a list of FPPA´s member publications´ homepages. The pages of the Finnish Newspapers Association provide background information on the Association itself as well as lists of all newspapers published in the country. There is also a list of the Internet addresses of Finnish newspapers. Another exhaustive list of Finnish web papers and periodicals can be found on the pages of the Union of Journalists in Finland.

The web pages of the Association of Finnish Broadcasters, which is the interest organization of private radio stations in Finland, provide information on the past and present of commercial radio broadcasting in Finland. The pages also include a comprehensive list of the web pages and broadcasting frequencies of radio stations currently in operation.

The pages of the Finnish Film Foundation include up-to-date information on new and upcoming Finnish films, the biggest box-office hits, and on the operation of cinemas. There is also a short index of important figures in Finnish film. The Finnish Book Publishers' Association has on its pages a short historical survey of book publishing in Finland as well as key annual statistics. Cultnet's Booknet includes information on Finnish literature and lists of bookshops trading on the net.

A good and comprehensive source on popular music in Finland is Rockdata, which is maintained on a voluntary basis. The site includes links to both official and fans' pages. Much of the text is also available in English. As well as introducing different bands, the pages also include a list of Finnish record companies.

The English-language pages of the Ministry of Transport and Communications provide an official source of information on the communications sector in Finland. The pages include current news, information on statutes, as well as summaries of the Ministry's annual reports and operational plans.

Web addresses of the services mentioned in the above chapter (pages in English if not otherwise mentioned):

Finnish Periodical Publishers' Association (Aikakauslehtien Liitto)	<http://www.aikakaus.fi/>
Finnish Newspapers Association (Sanomalehtien Liitto)	< http://www.sanomalehdet.fi/ >

Union of Journalists in Finland (Suomen Journalistiliitto) list of links to web papers (in Finnish)	<http://www.journalistiliitto.fi/maailmalle/lehdet.html>
Association of Finnish Broadcasters (Suomen Radioiden Liitto)	<http://www.radioliitto.fi/englanti.htm>
Finnish Film Foundation (Suomen Elokuvasäätiö)	<http://www.ses.fi/English/>
The Finnish Book Publishers' Association (Suomen Kustannusyhdistys)	<http://sky.cultnet.fi/summary.html>
Cultnet's Booknet (mainly in Finnish)	<http://booknet.cultnet.fi/>
Rockdata	<http://www.sjoki.uta.fi/~latvis/rockdata.html>
The Ministry of Transport and Communications of Finland (Liikenneministeriö)	<http://www.vn.mintc.fi/www/sivut/english/default.html>

In conclusion

There is quite a wide range of Finnish web publications on the net that are published by traditional media houses, but the bulk of their contents consist of material originally intended for publication elsewhere. At least so far relatively little effort has been invested in preparing fresh materials specifically for publication on the net. This is because of lack of resources: web publishing is not a profitable business, and it is expected that it will take years before the investments made will begin to pay back.

Traditional publishers are no longer on their own on the net trying to capture the attention of news audiences. During 1998 Finnish Internet service providers have expanded their own pages beyond lists of links. Sonera, the now privatized Finnish Telecom, is not the only provider aiming to expand its popular homepages into a full-service portal; in addition to Finnet Group, Scandinavia's biggest telecommunications company Telia has also joined the competition. Both Sonera and Telia also offer a news service. Brief news bulletins are now also provided by the Finnish search page Ihmemaa.

Web addresses of the services mentioned in the above chapter:

Sonera Inet keskuskatu	<http://www.inet.fi/>
Finnet Group's Kolumbus	<http://kanava.kolumbus.fi>
Telia Sirkus	<http://www.sirkus.com/>
Ihmemaa	<http://www.fi/>

*Päivi Kuusisto**

* *The writer is currently working for the City of Tampere as Internet information coordinator.*

Sources

Ilkas, Hannu (1997) Verkkolehden markkinatutkimus. Yhteenveto ja grafiikka. Helsinki: Sanomalehtien Liitto & Taloustutkimus.

Internet Tracking (1998).
<http://www.toy.fi/tuotteet/internet/inet3.htm>

Number of Internet hosts per 1 000 population
<http://www.tieke.fi/tietopal/tilasto/nwhpa.htm>

Nurmela, Juha (1998) Does modern information technology select its users? Reviews 1998/5. Helsinki: Statistics Finland.

Rissa & Järvinen Oy (1997) Internet-käyttäjäselvitys 1997. Mihin Internetiä käytetään? [7.11.1998]
<http://www.pjoy.fi/tutkimus/kt97/mihin.htm>

Turpeinen, Päivi (1998) Tarpeet ja motiivit. In Uusmedia kuluttajan silmin. Digitaalisen median raportti 2/98. Helsinki: Tekes. 51–70.

Web Traffic Monitor (1998).
<http://www.toy.fi/tuotteet/wtm/wtmresults.htm>

Top ten WWW homepages (1998).
<http://www.toy.fi/tuotteet/kotisivut/kotisivut4.htm>

Further information in English

Ministry of Transport and Communications of Finland
<http://www.mintc.fi/www/sivut/english/default.html>

Newsroom Finland. News bulletin edited by the Ministry of Foreign Affairs.
<http://virtual.finland.fi/news/>

News from Radio Finland (YLE)
<http://www.yle.fi/rfinland/>

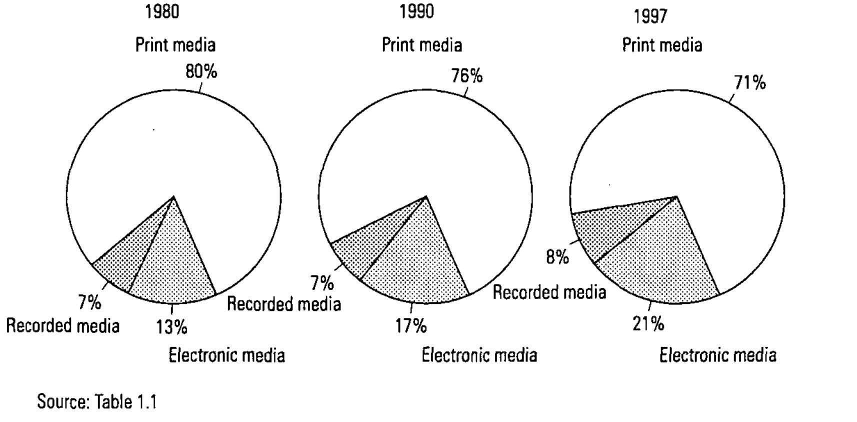
TIVEKE. The national information network development programme of the Ministry of Transport and Communications.
<http://www.sty.fi/tiveke/english/>

Media statistics

1 Mass media economy and consumption

Severe economic recession in the early 1990s played havoc with Finland's mass media economy. Total turnover in the mass media sector declined by 12 per cent from 1990 to 1993; during the same period GDP declined by 6 per cent. Since the mid-1990s, however, the mass media markets have been growing again, with the annual rate reaching around 5–6 per cent. In 1997 the turnover of the mass media sector totalled FIM 18.4 billion, up by around 5 per cent on the figure for the previous year. Mass media turnover as a proportion of GDP has remained steadily at around 3 per cent for the past ten years or so. In other words the mass media have not ranked among the growth sectors of the national economy. (Table 1.)

Figure 1.1 Mass media turnover 1980, 1990 and 1997



Source: Table 1.1

Print media

Print media (newspapers and magazines, books, printed advertising material) recorded a turnover of FIM 13.1 billion and remain the dominant force in the mass media economy. Although the figure has been steadily falling since the mid-1980s, the print media still account for 70 per cent of the industry's turnover. During the past ten years the share of the print media has dropped by around 6 percentage points, mainly in favour of the electronic media. (Table 1.)

Nonetheless newspapers alone still account for almost one-third (30%) of the turnover of the mass media sector: in 1997 their combined turnover was FIM 5.6 billion. During the 1990s the share of newspapers has declined by only a couple of percentage points. This is a fairly minor setback when considered against the dramatic changes in newspapers' sources of revenue and circulation trends. Today, advertising revenue accounts for no more than just over half of the takings of dailies, compared to over 70 per cent in the late 1980s (these figures include classified advertisements). During the 1990s the combined circulation of all newspapers has declined by 18 per cent from 4.1 million to 3.4 million copies. The decline finally seemed to bottom out for dailies in 1997, but for other newspapers (most of which are local papers) circulation figures are still falling.

Magazines and periodicals recorded a turnover of around FIM 3.4 billion, accounting for 18 per cent of the mass media sector. If newspapers have spent most of the 1990s struggling to survive, for magazines the past decade could be described as something of a success story. According to audit data the circulation of magazines and periodicals has been increasing in recent years. Indeed the main sources of income for magazines are subscriptions and single-copy sales, although during the 1990s the role of advertising revenue has been increasing and magazines have taken up a growing share of the total advertising cake. In 1997 advertising revenue accounted for an estimated one-quarter of magazines' takings compared to less than one-fifth in the early 1990s.

Book sales in 1997 totalled around FIM 2.3 billion. Almost 40 per cent of all books are sold through book shops, while department stores and supermarkets account for around 10 per cent. Direct sales by publishers (mostly non-fiction) account for around one-fifth, book clubs (mainly fiction) for some ten per cent and other channels for around 20 per cent. In the early 1990s book sales were adversely affected by the austerity budgets of schools and libraries. In recent years both schools and libraries have been spending somewhat more on acquisitions again, but policies have been changing: libraries are now investing a growing proportion of their monies on audiovisual materials and schools have taken to recycling textbooks.

Electronic mass media

Electronic media have a growing share of the mass media market but still account for no more than around one-fifth of the industry's turnover. In 1997 the turnover of electronic media was FIM 3.7 billion.

Nationwide radio and television showed a turnover of FIM 2.7 billion, i.e. almost three-quarters of the total turnover of electronic mass media. The volume of business in this sector has not been growing at the pace that was widely anticipated only a few years ago. For example, the growth of television advertising during the past couple of years has been at roughly the same level as the growth rates for advertising in newspapers and magazines. Indeed during 1995–97 television advertising as a proportion of total media advertising showed no growth at all. The start-up in 1997 of Channel Four (Finland's second nationwide commercial television station) and Radio Nova (Finland's first nationwide commercial radio station) had only a minor impact on the economic volume of nationwide television and radio. In Finland television still accounts for no more than 21 per cent of total media advertising, well short of the figure of 30 per cent (1996) for Western Europe on average.

Cable television operators' takings in subscription fees for pay-TV channels (around FIM 115 million) accounted for one third of the turnover of cable television. In 1997 the turnover of cable television operators amounted to just over FIM 340 million.

The turnover of local radio stations dropped to below FIM 200 million in the early 1990s and has never recovered beyond that mark since. Neither the major changes in the structure of local radio nor the arrival of new chains of commercial stations have helped to inspire strong growth in this sector. In 1998, the turnover of local radio stations stood at FIM 190 million. Between 1990 and 1998 around 30 local radio stations were closed down or merged with other stations. However, the total number of operators has remained more or less unchanged as new actors have turned up to take on the challenge. In 1998 there were a total of 60 local radio stations in operation.

Data on the volume of electronic online information services mainly comprise business-to-business services, which in money terms is also by far the most significant sector. In 1997 a total of FIM 450 million was spent on these services. As yet consumer demand for fee-based online information services is marginal, and in 1997 companies spent no more than an estimated FIM 10 million on advertising on the Internet.

Recorded media

Recorded media have accounted for around 6–7 per cent of the mass media economy for quite some while, but it seems that this figure is now on the rise. The phonogram markets have shown relatively strong growth during the past couple of years. In 1997, phonograms sales totalled FIM 725 million. However, a major new threat to this growth is represented by pirating, which is a booming business just across the border in the Baltic and St. Petersburg regions. Not only top-selling international artists but also domestic performers have now become victims of the pirating business.

Video rentals and sell-though showed a turnover of FIM 370 million in 1997. Sell-through videos account for around two-thirds of the markets, rentals for around one-third. The market shares of these two segments have been virtually turned upside down during the 1990s. At the beginning of the decade sell-through videos accounted for less than one-quarter of the total markets.

In 1997 sales of CD-ROMs totalled FIM 200 million, showing an increase of more than 30 per cent. In 1997 utility categories accounted for around one-third of the total markets of CD-ROMs, with games accounting for two-thirds (this latter category does not include playstation products). It is estimated that domestic products account for around half of the sales of utility CD-ROMs, in the games category domestic products account for no more than a few per cent.

In recent years the number of cinema admissions has increased, and the turnover of theatres showed yearly increase figure of around ten per cent in 1997. However, people in Finland still go to the cinema less often than people in Western European countries on average. In Finland the average number of admissions per capita in 1998 was 1.5; in most other countries the figure is around two or even over.

Advertising

In 1997 a total of around FIM 6 billion was spent on advertising in the mass media. Advertising increased very rapidly towards the end of the 1980s, but in the early 1990s the trend was quite dramatically reversed. During the recession in 1990–1993, advertising in the mass media declined by around one-quarter (–24%), and in 1996 total advertising expenditure was still at a lower level (FIM 5.4 billion) than in 1990 (FIM 5.7 billion). Indeed the volume of mass media advertising as a proportion of GDP has declined: in 1997 it was around one per cent, having peaked in 1989 at around 1.2 per cent. (Tables 3 & 4.)

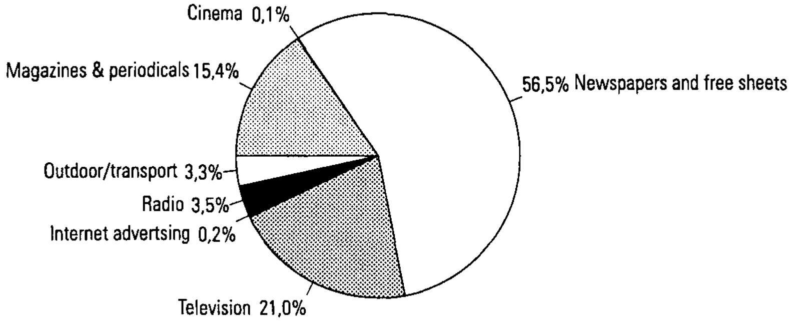
Newspapers remain a dominant force in advertising, even though their share of total media advertising has declined during the 1990s by 10 percentage points. Even so newspapers still account for over half (52% in 1997) of total advertising expenditure in Finland. This figure is markedly higher than the average for Western Europe (40% in 1996).

In contrast to the recent trends in development in many other countries, magazines in Finland have increased their share of total media advertising. In 1997 magazines accounted for 15 per cent of the advertising cake. In many other countries the share of magazines has been declining ever since the mid-1980s. The difference between Finland and the average level in Europe (19% in 1996) has been reduced to four percentage points from double figures in 1990.

In the beginning of the 1990s television accounted for no more than 14 per cent of total media advertising in Finland. This figure started rapidly to increase around the mid-1990s, but since 1995 it has remained unchanged at 21 per cent. Television's share of media advertising in Finland is still markedly lower than in Europe on average. In 1996 the average market share of television in Western European countries was around 30 per cent.

The share of local radio advertising has declined during the 1990s by one percentage point from 4.5 per cent to 3.5 per cent. The average figure for Europe in 1996 was 5 per cent.

Figure 1.2 Advertising in mass media 1997



Source: Table 1.4

The employment effects of mass communication

In 1996 the mass media sector employed just over 2 per cent of the work force. This figure has remained essentially unchanged since the early 1980s. The statistics do not include personnel in the wholesale and retail trade of communication media nor freelance journalists. (Table 5.)

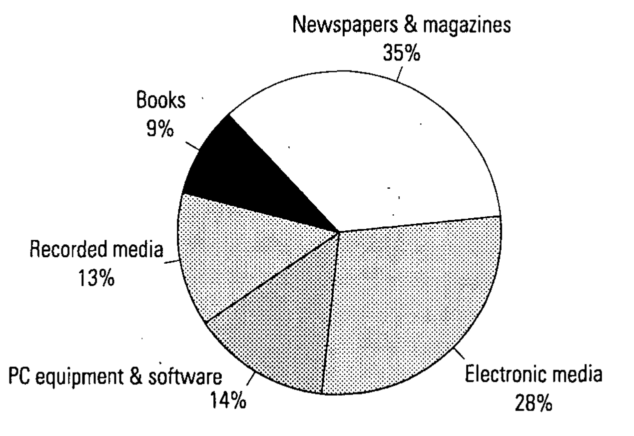
As well as representing the dominant force in economic terms, the print media in Finland are also by far the biggest employer in the mass media. On the other hand the printing industry also saw the biggest number of job losses during the recession in the early 1990s.

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

Household mass media consumption and expenses

In 1996 Finnish households spent 4.4 per cent of their total consumption expenditures in mass media. This figure has been slightly increasing in recent years (Table 19). The biggest single expense items were represented by newspapers and magazines as well as TV licence and other TV fees. The amount of money spent on home PCs, peripherals and software is clearly increasing.

Figure 1.3 Household consumption expenditure in mass media 1996



Source: Table 1.19

Retail sales of entertainment electronics totalled around FIM 3.2 billion in 1997. Sales have been increasing very sharply in recent years. The biggest increase was recorded for PCs (37%), TV games and consoles (144%) and satellite packages (72%). PC sales totalled around FIM one billion. (Table 18.)

Total sales of entertainment electronics did not recover to the pre-recession level until 1996. In the early 1990s the business was hit quite severely not only by economic recession but also by the lack of new and attractive mass market products. At their lowest, in 1993, sales at nominal prices stood at less than 60 per cent of the figures for 1990.

The PC market is particularly buoyant. Sales volumes are continuing to grow, and with consumers now moving on to buy more and more powerful multimedia PCs there has been no major change in the average unit prices. According to Statistics Finland's autumn 1998 consumer barometer, 27 per cent of Finnish households had a multimedia PC with CD-ROM. Almost one-fifth (19%) of all households had access to the Internet.

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.

Advertising investments and their breakdown by different mass media are monitored by Suomen Gallup-Media Oy. In the time series shown in Table 3, advertising planning and production costs are included in the figures for media advertising. The net figures describing the time series years 1980 and 1985 have been adapted to comply with the new calculation method used since 1988. Table 4 provides more detailed data on the breakdown of advertising in the 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 Statistics Finland's industrial statistics and business register, 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 source for consumption expenditure in mass media in Finland is Statistics Finland's consumer survey.

Finally, data on the amount of time spent with different mass media are from the Intermedia survey by MDC Helsinki Group - Media research Ltd. Data on the amount of time spent with mass media relative to other time usage can be found in the studies conducted by Statistics Finland in 1979 and 1987/88 and from the ongoing 1999 time usage survey.

Tuomo Sauri

Figures

Tables

1.1 Mass media market volume in Finland 1980 – 1997

	1980		1985		1990		1991		1992	
	FIM million	%	FIM million	%	FIM million	%	FIM million	%	FIM million	%
Dailies (7–4 times a week)	1 467	26.5	2 920	27.6	4 450	27.6	4 115	26.5	4 090	27.2
Non-dailies (3–1 times a week)	225	4.1	460	4.4	680	4.2	690	4.4	630	4.2
Free sheets	85	1.5	230	2.2	325	2.0	285	1.8	245	1.6
Magazines & periodicals	1 205	21.8	2 125	20.1	2 970	18.4	2 890	18.6	2 750	18.3
Books	870	15.7	1 340	12.7	2 210	13.7	2 130	13.7	2 025	13.4
Printed advertising material	550	9.9	1 230	11.6	1 570	9.8	1 450	9.3	1 320	8.8
Print media total	**4 402**	**79.6**	**8 305**	**78.6**	**12 205**	**75.8**	**11 560**	**74.5**	**11 060**	**73.5**
Nationwide television & radio	732	13.2	1 390	13.2	2 022	12.6	2 150	13.9	2 253	15.0
Local radio	–	–	10	0.1	235	1.5	200	1.3	190	1.3
Cable television	7	0.1	44	0.4	313	1.9	300	1.9	321	2.1
Online information services	1	0.0	50	0.5	170	1.1	205	1.3	220	1.5
Electronic media total	**740**	**13.4**	**1 494**	**14.1**	**2 740**	**17.0**	**2 855**	**18.4**	**2 984**	**19.8**
Phonograms	252	4.6	404	3.8	666	4.1	650	4.2	580	3.9
Videos	3	0.1	190	1.8	305	1.9	265	1.7	255	1.7
Cinemas	136	2.5	173	1.6	186	1.2	188	1.2	178	1.2
CD-Rom & other digital offline media										
Recorded media total	**391**	**7.1**	**767**	**7.3**	**1 157**	**7.2**	**1 103**	**7.1**	**1 013**	**6.7**
Mass media total	**5 533**	**100.0**	**10 566**	**100.0**	**16 102**	**100**	**16 102**	**100.0**	**15 057**	**100.0**
At fixed (1997) prices	12 029	100.0	15 257	100.0	18 260	100.0	17 535	100.0	15 975	100.0
Mass media as % of GDP	2.9		3.2		3.1		3.1		3.1	

The figures include domestic production and imports. Exports have been eliminated.

Newspaper and magazine figures for 1992 and onwards are not wholly comparable with the figures until 1991.

Book sales and nationwide TV & radio figures for 1996 and onwards are not fully comparable with the figures until 1995.

Source: Statistics Finland, Unit of Culture and the Media

1.1 Continued

	1993		1994		1995		1996		1997		Change 1997/96
	FIM million	%	FIM million	%	FIM million	%	FIM million	%	FIM million	%	%
Dailies (7–4 times a week)	3 980	27.1	4 370	28.1	4 650	28.2	4 725	26.9	4 940	26.9	4.6
Non-dailies (3–1 times a week)	610	4.2	615	4.0	620	3.8	635	3.6	615	3.4	–3.1
Free sheets	230	1.6	270	1.7	280	1.7	300	1.7	310	1.7	3.3
Magazines & periodicals	2 770	18.9	2 810	18.1	3 020	18.3	3 200	18.2	3 400	18.5	6.3
Books	1 930	13.1	1 930	12.4	2 030	12.3	2 220	12.7	2 325	12.7	4.7
Printed advertising material	1 210	8.2	1 310	8.4	1 300	7.9	1 540	8.8	1 550	8.4	0.6
Print media total	**10 730**	**73.1**	**11 305**	**72.7**	**11 900**	**72.1**	**12 620**	**71.9**	**13 140**	**71.6**	**4.1**
Nationwide television & radio	2 264	15.4	2 367	15.2	2 513	15.2	2 562	14.6	2 716	14.8	6.0
Local radio	170	1.2	170	1.1	185	1.1	180	1.0	190	1.0	5.6
Cable television	305	2.1	326	2.1	335	2.0	374	2.1	342	1.9	–8.6
Online information services	235	1.6	290	1.9	370	2.2	415	2.4	450	2.5	8.4
Electronic media total	**2 974**	**20.2**	**3 153**	**20.3**	**3 403**	**20.6**	**3 531**	**20.1**	**3 698**	**20.1**	**4.7**
Phonograms	530	3.6	585	3.8	630	3.8	675	3.8	725	3.9	7.4
Videos	255	1.7	280	1.8	315	1.9	370	2.1	370	2.0	0.0
Cinemas	199	1.4	205	1.3	200	1.2	203	1.2	225	1.2	10.8
CD-Rom & other digital offline media			20	0.1	50	0.3	150	0.9	200	1.1	33.3
Recorded media total	**984**	**6.7**	**1 090**	**7.0**	**1 195**	**7.2**	**1 398**	**8.0**	**1 520**	**8.3**	**8.7**
Mass media total	**14 688**	**100.0**	**15 548**	**100.0**	**16 498**	**100.0**	**17 549**	**100.0**	**18 358**	**100.0**	**4.6**
At fixed (1997) prices	15 261	100.0	15 983	100.0	16 795	100.0	17 760	100.0	18 358	100.0	3.4
Mass media as % of GDP	2.9		3.0		2.9		3.0		2.9		

1.2 Top ten media companies in Finland 1998

Rank	Company	FIM million		Change 1998/97 %	Activities
1	Sanoma – WSOY*	7 443		5.2	Multimedia
2	Alma Media	2 815		3.2	Multimedia
3	Finnish Broadcasting Company YLE	1 990		–0.2	TV & radio
4	Otava – Yhtyneet Kuvalehdet Group	1 108		..	Books, magazines
5	TS Group	909		6.4	Newspapers, local radio
6	Kymen Lehtimedia	490		1.4	Newspapers
7	Kauppakaari	430	(1997)	..	Books
8	A-lehdet	402		14.3	Magazines
9	Keski-Suomen Media	344		53.4	Newspapers, books, local radio
10	Valitut Palat – Readers´Digest	337		–4.4	Magazines, books, phonograms

* *Pro forma turnover 1998. A fusion of Sanoma, Helsinki Media, and WSOY took place in May 1999. Rautakirja Group, a major distributor of periodicals and books and owner of Finland's largest cinema chain, is also included as a subsidiary. (Approximately one half of Rautakirja´s turnover of FIM 3.4 billion comes from distibution and single copy sales of newspapers and magazines, sales of books, video distribution and the distribution of films plus movie theatres).*

Source: Company annual reports

1.3 Media advertising 1980 – 1997* (Planning & production included)

	1980	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	Change 1997/96
	%														%
Newspapers**	64.8	68.5	69.0	68.4	69.5	69.2	67.4	66.2	63.3	61.3	59.7	57.5	57.1	55.6	–2.6
Magazines & periodicals	16.8	13.4	12.7	12.0	11.5	11.0	11.4	10.7	10.7	12.5	13.2	13.9	14.5	15.8	9.0
Television***	15.6	15.4	14.9	15.4	13.8	13.5	14.2	16.1	18.6	19.3	20.4	21.7	21.6	21.5	–0.5
Radio	–	0.2	1.1	1.7	2.5	3.6	4.2	4.0	4.3	3.9	3.6	3.5	3.3	3.3	0.0
Cinema	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0
Outdoor & transport advertising	2.6	2.4	2.3	2.4	2.6	2.6	2.8	2.8	3.0	2.9	3.1	3.3	3.5	3.6	2.9
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	100.0	0.0
Advertising in mass media total FIM million	1 635	3 615	3 916	4 323	4 869	5 632	5 671	4 952	4 447	4 316	4 724	5 278	5 431	5 967	9.9
Advertising as % of GDP	1.0	1.1	1.1	1.1	1.1	1.2	1.1	1.0	0.9	0.9	0.9	1.0	1.0	1.0	–

* *These data are net of discounts. Figures include planning and production costs.*
Net figures for 1980–1987 have been adapted to comply with the new calculation method used since 1988.
** *Dailies, non-dailies, and free sheets.*
*** *Cable television included since 1984.*

Source: MDC Helsinki Group

1.4 Media advertising 1990 – 1997

	1990		1991		1992		1993	
	FIM million	%	FIM million	%	FIM million	%	FIM million	%
Dailies (7–4 times a week)	2 660	55.4	2 250	53.8	2 002	51.8	1 889	50.2
Non-dailies	380	7.9	358	8.6	302	7.8	283	7.5
Newspapers total	3 040	63.4	2 608	62.4	2 304	59.6	2 172	57.7
Free sheets	230	4.8	203	4.9	174	4.5	181	4.8
Newspapers and free sheets total	**3 270**	**68.2**	**2 811**	**67.2**	**2 478**	**64**	**2 353**	**62.5**
Consumer magazines	270	5.6	225	5.4	203	5.2	216	5.7
Trade & business magazines	205	4.3	171	4.1	162	4.2	196	5.2
Customer magazines	56	1.2	35	0.8	39	1.0	31	0.8
Magazines & periodicals total**	**531**	**11.1**	**431**	**10.3**	**404**	**10.4**	**443**	**11.8**
Press media advertising total***	**3 801**	**79.2**	**3 242**	**77.5**	**2 882**	**74.5**	**2 796**	**74.2**
Television	638	13.3	628	15.0	677	17.5	683	18.1
Cable television	17	0.4	18	0.4	19	0.5	24	0.6
Radio	215	4.5	180	4.3	175	4.5	151	4.0
Internet advertising								
Electronic media advertising total	**870**	**18.1**	**826**	**19.8**	**871**	**22.5**	**858**	**22.8**
Cinema	3.7	0.1	3.2	0.1	4	0.1	3	0.1
Outdoor/Transport	123	2.6	110	2.6	110	2.8	109	2.9
Mass media advertising total	**4 798**	**100.0**	**4 181**	**100.0**	**3 867**	**100.0**	**3 766**	**100.0**
Planning and production	873	15.4	771	15.6	580	13.0	550	12.7
Total	**5 671**	**100.0**	**4 952**	**100.0**	**4 447**	**100.0**	**4 316**	**100.0**

* *These data are net of discounts. Planning and production costs as a separate catecory.*
** *Magazine figures since 1992 are not fully comparable with the figures until 1991.*
*** *Announcements, notices, column advertisements and public offices are not included in press advertising*

Source: MDC Helsinki Group

1.4 Continued

	1994		1995		1996		1997		Change 1997/96
	FIM million	%	FIM million	%	FIM million	%	FIM million	%	%
Dailies (7–4 times a week)	2 012	49.0	2 188	47.8	2 226	47.3	2 390	46.3	7.4
Non-dailies	284	6.9	299	6.5	304	6.5	308	6.0	1.3
Newspapers total	2 296	55.9	2 487	54.3	2 530	53.7	2 698	52.2	6.6
Free sheets	188	4.6	200	4.4	214	4.5	220	4.3	2.8
Newspapers and free sheets total	**2 482**	**60.4**	**2 687**	**58.7**	**2 744**	**58.2**	**2 918**	**56.5**	**6.3**
Consumer magazines	264	6.4	298	6.5	313	6.6	382	7.4	22.0
Trade & business magazines	233	5.7	275	6.0	291	6.2	341	6.6	17.2
Customer magazines	37	0.9	44	1.0	57	1.2	72	1.4	26.3
Magazines & periodicals total**	**534**	**13.0**	**617**	**13.5**	**661**	**14.0**	**795**	**15.4**	**20.3**
Press media advertising total***	**3 016**	**73.4**	**3 304**	**72.2**	**3 405**	**72.3**	**3 713**	**71.9**	**9.0**
Television	785	19.1	924	20.2	938	19.9	1 083	21.0	15.5
Cable television	28	0.7	37	0.8	45	1.0	2	0.0	–95.6
Radio	152	3.7	166	3.6	163	3.5	181	3.5	11.0
Internet advertising					5	0.1	10	0.2	100.0
Electronic media advertising total	**965**	**23.5**	**1 127**	**24.6**	**1 151**	**24.4**	**1 276**	**24.7**	**10.9**
Cinema	4	0.1	5	0.1	6	0.1	7	0.1	8.2
Outdoor/Transport	122	3.0	141	3.1	149	3.2	171	3.3	14.8
Mass media advertising total	**4 107**	**100.0**	**4 578**	**100.0**	**4 711**	**100.0**	**5 167**	**100.0**	**9.7**
Planning and production	617	13.1	700	13.3	720	13.3	800	13.4	11.1
Total	**4 724**	**100.0**	**5 278**	**100.0**	**5 431**	**100.0**	**5 967**	**100.0**	**9.9**

1.5 Mass communication as employer 1980 – 1996

	1980	1985	1990	1991	1992	1993	1994	1995	1996
	1 000 persons								
Publishing	14.6	16.9	16.0	15.6	14.6	15.6	15.0	14.7	14.3
Printing	23.1	24.2	23.4	21.0	19.3	16.6	15.3	15.0	14.9
Entertainment electronics industry	2.9	2.5	2.0	1.5	1.1	1.1	1.2	1.3	1.0
Advertising, news agencies, data banks	2.8	3.2	5.1	4.7	4.1	3.8	4.7	5.6	6.5
Radio and television	4.7	5.3	6.9	6.0	5.9	5.9	6.3	6.5	6.4
Film, video & phonogram production & distribution	1.5	1.8	1.9	1.5	1.5	1.6	1.5	1.6	1.9
Mass communication total	43.4	46.8	55.3	50.3	46.5	44.6	44.0	44.3	45.0
National economy	2 328	2 437	2 467	2 340	2 174	2 041	2 024	2 068	2 096
Contribution of mass communication to national economy, %	2.1	2.2	2.2	2.1	2.1	2.2	2.2	2.1	2.1
Postal services and telecommunications total	41.3	43.3	48.8	44.0	40.6	38.6	39.7	43.5	38.3

Figures do not include personnel in wholesale and retail trade.

Source: Business register. Statistics Finland.

Processed

1.6 Share of domestic production in different sectors of mass communication

Sector	Share of domestic production (%)	Basis for calculation
Literature	85	Finnish literature as proportion of all titles published in 1997
Phonograms	47	Phonograms produced in Finland as proportion of wholesale sales of Finnish group of IFPI in 1997
Film	5	Finnish film audience as proportion of total cinema-going audience 1997
Video	2	Finnish video programmes as proportion of wholesale (rentals+sell-trough) of Finnish Group of IFPI in 1994
Television		
– YLE	54	Domestic programming as proportion of programming time in 1997
– MTV3 Finlad	54	Domestic programming as proportion of programming time in 1997

Sources: Helsinki University Library
Finnish Group of IFPI
Finnish Film Foundation
YLE
MTV3 Finland

Sources: See Tables 2.13, 4.4, 6.1 and 7.3 in this volume.

1.7 Value of deliveries in different branches of the printing industry 1990 – 1996

	1990 FIM million	1991 FIM million	1992 FIM million	1993 FIM million	1994 FIM million
Publishing and printing	10 262	10 045	9 300	8 967	9 294
– publishing and printing of newspapers and periodicals	8 668	8 273	7 615	7 327	7 589
– book publishing and printing	1 594	1 772	1 684	1 640	1 704
Separate printing	7 375	6 662	5 808	5 754	6 237
Printing related services	570	510	464	408	415
Publishing and printing total	18 207	17 217	15 573	15 129	15 948

	1995 FIM million	1996 FIM million
Book publishing	1 836	1 882
Newspapers publishing	6 183	6 430
Magazines publishing	2 250	2 363
Total	10 269	10 675
Separate printing and printig related services	8 879	9 398
Total	19 148	20 073

Source: Yearbooks of industrial statistics. Statistics Finland

1.8 Staff engaged in printing and publishing 1985 – 1996*

	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
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
1992					
Salaried employees	9 160	1 377	2 596	246	13 379
Wage-earners	8 285	163	9 825	1 235	19 508
Total	17 445	1 540	12 421	1 481	32 887
1993					
Salaried employees	8 646	1 349	2 378	219	12 592
Wage-earners	7 574	180	8 791	1 089	17 634
Total	16 220	1 529	11 169	1 308	30 226
1994					
Salaried employees	8 455	1 458	2 311	210	12 434
Wage-earners	6 680	293	8 385	991	16 349
Total	15 135	1 751	10 696	1 201	28 783
	Publishing of books	**Publishing of newspapers**	**Publishing of magazines**	**Printing and printing-related services**	**Total**
1995					
Salaried employees	1 384	6 721	1 776	3 424	13 305
Wage-earners	138	5 036	102	1 067	15 955
Total	1 522	11 757	1 878	14 10	29 260
1996					
Salaried employees	1 378	6 152	1 838	3 354	12 722
Wage-earners	157	4 371	110	10 514	15 152
Total	1 535	10 523	1 948	13 868	27 874

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

Source: Yearbooks of industrial statistics. Statistics Finland.

1.9 Value of deliveries of some product groups in the printing industry 1990 – 1996

	1990	1991	1992	1993	1994	1995	1996	Change 1996/95
	FIM million							%
Books, leaflets	2 211	2 180	1 673	1 928	2 063	2 262	2 282	0.9
Newspapers, periodicals*	10 582	9 963	9 247	8 879	9 462	10 192	10 770	5.7
Children's illustrated books	136	132	99	97	105	119	75	–37.0
Bonds and securities	90	82	67	75	71	56	51	–8.9
Calendars	200	199	193	210	151	129	119	–7.8
Postcards	94	91	85	92	103	102	112	9.8
Printed matter for advertising purposes	1 424	1 315	1 260	1 248	1 352	1 445	1 677	16.1

* *Includes advertising revenue.*

Source: Yearbooks of industrial statistics. Statistics Finland

1.10 Printing industry exports and imports 1980 – 1997

	Exports FIM million	Imports FIM million
1980	363.4	253.0
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
1993	1 095.9	663.6
1994	1 301.4	679.9
1995	1 614.6	543.7
1996	1 779.8	653.9
1997	1 955.2	736.7
Change 1997/96 %	9.9	12.7

* *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 .*

Sources: Foreign trade statistics

Federation of the Printing Industry in Finland.

1.11 Printing industry exports by product groups 1990 – 1997

	1990	1991	1992	1993	1994	1995	1996	1997
	%	%	%	%	%	%	%	%
Printed matter for advertising purposes	37.0	38.0	40.1	41.4	38.1	31.1	30.1	34.9
Newspapers & periodicals	25.0	28.0	30.0	29.1	33.3	41.1	44.6	41.4
Books & leaflets	22.0	21.0	16.6	16.9	16.9	16.5	14.9	14.9
Forms & labels	9.0	8.0	8.2	7.6	7.4	7.6	6.6	6.1
Other	7.0	5.0	5.1	4.9	4.2	3.8	3.7	2.8
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Total FIM million	774.7	766.9	883.8	1 095.9	1 301.4	1 614.6	1 779.8	1 955.2

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

1.12 Breakdown of printing industry exports by country 1990 – 1997

	1990	1991	1992	1993	1994	1995	1996	1997
	%							
Russia	20.0	15.0	5.1	6.2	7.8	33.1	40.6	47.0
Sweden	43.0	45.0	47.2	39.1	34.5	28.7	26.1	20.5
Norway	9.0	10.0	10.4	11.8	10.6	9.2	8.6	8.6
Denmark	9.0	9.0	11.4	14.5	11.4	9.0	7.5	5.7
United Kingdom	8.0	8.0	7.6	7.7	7.1	5.3	4.9	5.3
Germany	3.0	4.0	2.6	3.7	3.3	3.2	2.7	2.6
Estonia	..	..	..	1.1	1.8	2.5	2.6	3.5
Latvia	..	..	..	..	..	..	..	0.9
Poland	..	..	..	5.2	4.6	3.0	0.8	0.4
Netherlands	..	..	2.5	2.4	2.0	0.7	0.6	0.5
France	..	..	..	..	..	0.3	0.5	..
Other countries	8.0	9.0	13.2	8.3	6.9	5.0	5.0	5.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Total FIM million	774.7	766.9	883.8	1 095.9	1 301.4	1 614.6	1 779.8	1 955.2

Sources: Foreign trade statistics

Federation of the Printing Industry in Finland

1.13 Printing industry imports by product groups 1990 – 1997

	1990	1991	1992	1993	1994	1995	1996	1997
	%							
Printed matter for advertising purposes	37.0	37.0	36.6	39.2	41.7	30.4	26.4	31.3
Newspapers & periodicals	14.0	16.0	16.0	16.1	14.4	16.7	21.2	19.4
Books & leaflets	33.0	34.0	35.4	32.7	30.7	36.3	34.1	32.4
Forms & labels	3.0	3.0	8.4	3.8	4.0	5.9	7.4	6.5
Other	13.0	10.0	3.6	8.3	9.3	10.7	11.0	10.4
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Total FIM million	638.3	633.2	668.9	663.6	679.9	543.7	653.9	736.7

Sources: Foreign trade statistics

Federation of the Printing Industry in Finland

1.14 Breakdown of printing industry imports by country 1990 –1997

	1990	1991	1992	1993	1994	1995	1996	1997
	%							
Sweden	22.0	22.0	22.9	20.4	21.0	19.2	21.1	20.8
United Kingdom	16.0	16.0	14.9	15.6	15.7	18.2	18.2	20.2
Germany	14.0	15.0	14.8	15.4	13.7	15.4	14.2	13.8
USA	10.0	9.0	9.6	11.7	13.7	12.5	9.5	8.2
Denmark	10.0	10.0	10.5	8.6	7.2	4.9	9.1	6.9
Italy	..	5.0	4.8	4.9	5.6	5.8	5.3	5.1
Netherlands	4.0	..	4.0	4.0	4.4	3.3	3.8	4.9
France	..	..	3.3	3.4	3.3	3.6	3.1	2.6
Switzerland	..	..	..	..	..	2.3	2.5	2.1
Estonia	..	..	..	..	..	1.0	1.4	1.3
Norway	..	..	..	..	..	1.6	1.4	1.3
Other countries	24.0	23.0	15.1	16.0	15.4	12.2	10.5	12.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Total FIM million	638.3	633.2	668.9	663.6	679.9	543.7	653.9	736.7

Sources: Foreign trade statistics

Federation of the Printing Industry in Finland

1.15 Value of deliveries in entertainment electronics industry 1980 – 1996

	1980	1985	1990	1991	1992	1993	1994	1995	1996	Change 1996/95
	FIM million									%
Colour television sets	572.6	909.0	924.5	688.5	642.1	770.5	844.7	812.4	564.3	–30.5
Other television sets	3.9	–	–	–	–	–	–	–	–	–
Radios, tuners, receivers, stack systems etc.	85.5	1.2	6.0	7.2	6.9	8.2	–	–	–	–
Microphones	0.1	–	0.2	0.8	0.5	0.7	0.5	0.3	0.2	–24.8
Amplifiers	8.2	14.6	33.4	14.0	12.7	15.0	18.2	37.6	23.3	–38.0
Loudspeakers	7.2	27.5	34.3	30.8	26.9	36.2	40.2	44.8	49.7	10.9
Tape recorders	–	2.8	19.3	19.1	25.3	20.0	18.0	26.1	22.4	–14.2
Phonograms and videograms	8	28.6	42.9	71.8	81	65.3	67.3	104.7	122.3	16.8
Blank audio and video cassettes	..	..	4.5	–	–	–	–	–	–	–
Total	677.5	955.1	1 017.7	760.4	795.4	915.9	988.9	1025.9	782.2	–23.8

Source: Yearbooks of industrial statistics, Statistics Finland

1.16 Staff engaged in the manufacture of entertainment electronics and other means of communication 1985 –1996

	Staff				
	Salaried employees		Wage-earners		Total
	Persons	%	Persons	%	Persons
Manufacture of communication technology*					
1985	3 177	48.7	3 343	51.3	6 520
1990	4 718	55.3	3 808	44.7	8 526
1991	4 597	57.2	3 435	42.8	8 032
1992	4 960	59.9	3 320	40.1	8 280
1993	5 688	59.8	3 825	40.2	9 513
1994	7 200	59.0	4 999	41.0	12 199
1995	9 310	57.0	7 018	43.0	16 328
1996	11 430	59.6	7 750	40.4	19 180
Manufacture of entertainment electronics and recordings**					
1985	666	29.5	1 595	70.5	2 261
1990	541	25.6	1 569	74.4	2 110
1991	527	30.9	1 176	69.1	1 703
1992	445	38.2	720	61.8	1 165
1993	245	29.7	579	70.3	824
1994	296	32.8	607	67.2	903
1995	484	33.3	968	66.7	1 452
1996	516	35.6	935	64.4	1 451

* *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.*
NB: *Figures for 1995 and onwards are not wholly comparable with the figures until 1994.*

Source: *Yearbooks of industrial statistics, Statistics Finland*

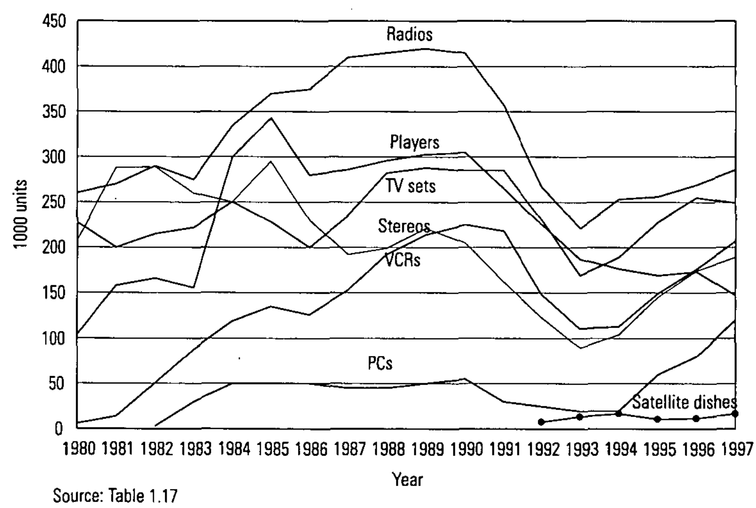
1.17 Retail sales of entertainment electronics 1980 – 1997

	1980	1985	1990	1991	1992	1993	1994	1995	1996	1997	Change 1997/96
	1 000 units										%
TV sets	227	228	285	285	230	169	189	228	255	249	–2.4
VCRs and camcorders	6	135	225	218	148	111	113	149	176	207	17.6
Satellite dishes	..	..	..	..	8	14	17	11	12	17	41.7
Hi-fi equipment and loudspeakers	208	295	205	162	123	90	104	145	174	189	8.6
Players	104	343	305	265	225	187	176	169	174	147	–15.5
Headphones								108	147	140	–4.8
Radios and portable sets	260	370	415	357	267	221	253	256	269	286	6.3
Car radios & stereos	130	170	200	136	105	86	94	125	160	172	7.5
Tv game consoles					45	45	25	20	31	84	171.0
PCs	–	50	55	30	25	20	20	60	80	120	50.0

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 1.4 Sales of selected entertainment electronics 1980 – 1997



Source: Table 1.17

1.18 Entertainment electronics: sales volume 1980 – 1997

	1980	1985	1990	1991	1992	1993	1994	1995	1996	1997	Change 1997/96
	FIM million										%
TV sets	515	570	784	770	621	549	614	707	740	774	4.6
VCRs and camcorders	31	536	636	542	335	315	315	380	403	412	2.2
Satellite dishes	..	..	..	..	40	54	46	25	25	43	72.0
Hi-fi equipment and loudspeakers	225	249	269	227	203	190	213	250	298	289	-3.0
Players	96	184	201	160	138	97	86	81	74	74	0.0
Headphones								16	22	24	9.1
Radios and portable sets	136	227	168	139	94	89	112	123	127	117	-7.9
Car radios & stereos	117	217	280	190	158	129	146	182	221	229	3.6
Tv games and consoles					45	41	65	58	90	220	144.4
PCs	–	125	275	150	113	98	120	600	720	984	36.7
Total	1 120	2 108	2 613	2 178	1 747	1 562	1 717	2 422	2 720	3 166	16.4
Fixed (1997) prices	2 435	3 044	2 963	2 372	1 854	1 623	1 765	2 466	2 753	3 166	15.0

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

Source: Domestic Appliances Association

1.19 Household consumption expenditure in mass media and its share of total consumption expenditure 1990 – 1996

	All households 1990		1994		1995		1996	
	FIM	%	FIM	%	FIM	%	FIM	%
Radio equipment	246	5.2	157	3.3	188	3.8	191	3.6
TV equipment	425	8.9	319	6.7	354	7.2	422	8.0
TV licence fees, cable TV payments	742	15.6	822	17.3	875	17.8	875	16.7
CD-players, cassette decs etc.	63	1.3	81	1.7	83	1.7	91	1.7
Records, audio cassettes	180	3.8	194	4.1	215	4.4	208	4.0
VCRs, camcorders	277	5.8	133	2.8	132	2.7	172	3.3
Video cassettes	162	3.4	116	2.4	127	2.6	146	2.8
Cinema	71	1.5	84	1.8	78	1.6	78	1.5
Books	579	12.1	651	13.7	548	11.2	487	9.3
Newspapers	960	20.1	1 014	21.3	1 007	20.5	1 051	20.0
Magazines & periodicals	757	15.9	749	15.8	770	15.7	812	15.5
PC equipment, game consoles, programs	307	6.4	441	9.3	537	10.9	719	13.7
Consumption expenditure in mass media total	4 769	100.0	4 761	100.0	4 914	100.0	5 252	100.0
Total consumption expenditure per household	115 117		115 497		118 043		120 733	
Mass media expenditure as % of total consumption	4.1		4.1		4.2		4.4	
No of households	2 154 281		2 261 684		2 291 300		2 310 000	

Source: Statistics Finland, Household surveys
Processed

1.20 Daily reach of mass media 1998

	All Age 12 + %	Sex Female	Male	Age 15 – 24	25 – 44	45 – 59	60 +
Magazines	82	81	83	79	81	84	83
Newspapers	91	90	93	91	90	94	93
Free sheets	25	26	24	27	26	26	23
Direct advertising	33	35	31	27	34	37	37
Books	34	39	28	42	30	35	31
Reading total	**98**	**98**	**98**	**99**	**97**	**98**	**98**
TV	88	90	87	83	88	90	90
Video	24	23	25	31	25	18	17
Radio	76	72	80	74	77	79	79
Listening and viewing total	**96**	**97**	**96**	**94**	**96**	**98**	**97**

The data come from a computer-assisted telepanel involving some 800 households and a total of 1 300 participants aged 12–69 years. MDC Helsinki Group collects the data through PCs that it has provided to these households.

The figures on TV, video and radio differ from data presented in chapters 2, 3 and 5.

Source: MDC Helsinki Group, Intermedia 1998

1.21 Time spent with mass media 1998

	All Age 12+ min/day	Sex Female	Male	Age 15 – 24	25 – 44	45 – 59	60 +
Magazines	49	48	50	42	40	53	76
Newspapers	42	39	46	26	35	51	79
Free sheets	4	4	4	4	4	3	6
Direct advertising	3	3	3	3	3	4	4
Books	26	32	20	51	17	25	26
Reading total	**124**	**126**	**123**	**126**	**99**	**136**	**191**
TV	192	192	192	174	174	199	270
Video	18	15	20	31	15	11	13
Radio	136	143	129	100	132	175	139
Listening and viewing total	**346**	**350**	**341**	**305**	**321**	**385**	**422**
Mass media total	**470**	**476**	**464**	**431**	**420**	**521**	**613**

The data come from a computer-assisted telepanel involving some 800 households and a total of 1 300 participants aged 12–69 years. MDC Helsinki Group collects the data through PCs that it has provided to these households.

The figures on TV, video and radio differ from data presented in chapters 2, 3 and 5.

Source: MDC Helsinki Group, Intermedia 1998

2 Television

The basic structure of television broadcasting in Finland has changed quite dramatically during the 1990s. In 1993 the traditional symbiotic model of public service and commercial television was finally buried and commercial television, through MTV Finland, was detached from the public service broadcasting operations of the Finnish Broadcasting Company YLE: MTV was granted an independent operating licence and it moved to its own channel.

Since the beginning of regular television broadcasting in Finland in 1957, the commercial television station MTV had to lease its broadcasting time (approximately 20 hours a week) from the public service broadcaster YLE on the latter's 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 also been a major source of funding for YLE in addition to licence fees. The compensation for broadcasting on public service channels or the "public service fee", as it has been described in the 1990s, was intended as compensation to YLE for lost advertising revenues. This has been a special feature of funding public service television in Finland. It has remained in place, in a slightly revised form, despite the structural changes in recent years.

YLE was also an important minority shareholder in MTV and in its subsidiary Kolmostelevisio (Channel Three). Originally founded in 1985 as a joint venture of YLE, MTV and Nokia and since 1990 a subsidiary of MTV, Kolmostelevisio broadcast on a separate channel from 1987 to 1992.

At the beginning of 1993 the public service operator YLE and the commercial MTV parted ways. Both 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, with its own operating licence. YLE has also given up its minority holdings in MTV and Kolmostelevisio. But even today, a very substantial part of MTV's revenues goes to YLE. Legislation adopted in 1998 renamed the public service fee as the operating licence fee and at the same time made it statutory. It was also extended to apply to all television (as from 1999) and radio broadcasting (as from 2004) over the air. The fee is applicable to all companies with a turnover in excess of FIM 20 million. MTV is therefore no longer the only operator paying this fee. (Cable television is exempted, however.)

The operating licence fees from television and radio broadcasters as well as TV viewers' licence fees are collected into the State Television and Radio Fund. The assets of the fund shall be used to finance the activities of YLE but may also be used otherwise to promote television and radio operations. The Council of State decides on the distribution of the assets of the fund for these purposes.

MTV3 is now part of Alma Media, Finland's second biggest mass communications company. Alma Media was created in spring 1998 through the merger of the major newspaper publisher Aamulehti Group and MTV3 Finland. Alma Media is also the biggest single shareholder in the country's only nationwide commercial radio channel, Radio Nova, which was launched in spring 1997.

Following the 1993 channel reform, with no technical obstacles in the way, there was no excuse any more for declining to grant an operating licence to a fourth nationwide channel that would compete with MTV for advertising money. In autumn 1996 the government granted an operating licence for Channel Four Finland (Nelonen), which started programming in summer 1997. The biggest owner of Channel Four is Helsinki Media Company (holding just over 50% of the share stock), which in spring 1999 merged with the leading Finnish newspaper company Sanoma Corporation and the largest Finnish book publisher WSOY. Sanoma - WSOY is now Finland's biggest media company (measured in terms of turnover) and the second biggest in Scandinavia. Other Channel Four shareholders include the Danish-based Egmont, and Finland's fourth biggest newspaper publisher TS-Yhtymä. During its first full year in business (1998) Channel Four's share of television viewers remained at less than 10 per cent.

Competition has become much fiercer in the new situation and viewer ratings are suddenly far more important to all operators. As far as YLE is concerned the current situation is in a sense quite contradictory: On the one hand the company wants to keep its own ratings high for reasons of legitimacy; but on the other hand, for reasons that have to do with funding, it is also in YLE's interests that commercial channels have good viewer ratings.

There are now plans to set up in Finland three terrestial television networks or multiplexes that will carry a dozen or so channels as well as a range of interactive services. Initially the launch of digital programming for the general public has been scheduled for the Olympic Games in the year 2000. Digital television licences will be decided upon by the Council of State in 1999.

YLE's revenues in 1998 totalled around FIM 2 billion. Over three-quarters of this came from licence fees. Network rents and public service fees account for about 20 per cent. The share of leasing fees and compensations paid by MTV peaked in the mid-1980s when they accounted for almost one-quarter of the total of YLE's revenues. (Table 2.)

In 1997 television represented 64 per cent or FIM 1.3 billion of YLE's total expenses. In addition to its two TV channels, YLE also has public service radio broadcasting on four nationwide channels, plus extensive regional radio services. (Tables 3 & 4.)

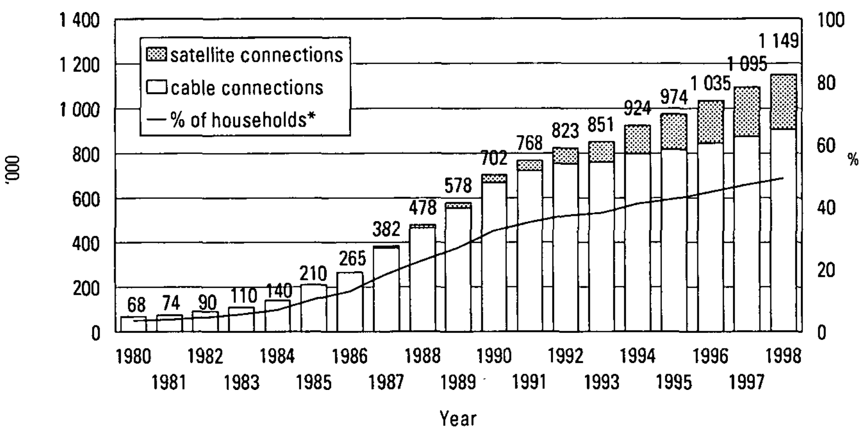
During the first years since the channel reform in 1993 MTV showed strong and rapid growth. In 1998 the company had a turnover of FIM 1.1 billion (Table 5). TV advertising as a proportion of total media advertising grew sharply in the early 1990s, but has remained steadily at 21 per cent in recent years. However, this share is still much lower than the European average, which in 1996 was 30 per cent.

In 1997 the Finnish Broadcasting Company had a staff of around 4 700 people, of whom around 2 100 were directly involved in television. The two nationwide commercial channels had a staff of just over 700, cable television companies had less than 400 employees. (Tables 8 – 10.)

In 1998 just under 2 million TV licences were purchased. After the slight downturn during the recession in the early 1990s, the number of TV licences has been steadily increasing again. Nonetheless large numbers continue to watch television without a licence. In the mid-1990s, for example, it was estimated that more than 10 per cent of all households with a television set did not have a licence. (Table 2.11.)

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. During the 1990s the growth in the number of cable television subscribers has slowed down considerably. At year-end 1998 the number of cable subscribers was 905 500, or 39 per cent of all households. 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 1 & Table 12.)

Figure 2.1 Cable and satellite subscribers 1980 – 1998



*Not all connections are households.
Source: Table 2.12

Cable television had a turnover of FIM 365 million in 1998. Annual fees were the biggest single revenue item (48%). In 1998 a total of FIM 120 million (33%) was spent on pay-TV services. (Table 7.)

Cable programming consists mainly of programmes transmitted by international satellite operators: TV5 Europe (858 000 subscribers), NBC Europe (855 000 subscribers), Eurosport (853 000 subscribers), and MTV Nordic (832 000 subscribers) (Table 13). In terms of total subscriptions, the biggest cable networks in Finland are Helsinki Televisio Oy (Helsinki Media), Sonera Oy Kaapeli-TV (several cable networks) and Tampereen Tietoverkko Oy (e.g. Alma Media). (Figure 6.)

Satellite reception has increased quite rapidly during the 1990s. In 1998 there were a total of 285 000 households (12%) with access to satellite television either via a communal antenna or a separate dish. All in all, with all statistical overlap eliminated, around 1.1 million households in Finland (49%) had access to cable and satellite networks. (Figure 1 & Table 12.)

Local over-the-air television broadcasting has remained at a fairly modest level in Finland. No more than three networks are involved, and two of these operate on amateur basis.

During 1997 YLE's weekly programming on its two national channels amounted to 179 hours, up by 70 per cent on the figure recorded before the 1993 channel reform. The weekly programming volume on MTV3 was 128 hours in 1997, which is 58 hours more than the programming volumes of MTV/Kolmostelevisio before the channel reform. Channel Four's weekly programming amounted to 59 hours in 1997. (Table 14.)

Both YLE and MTV made some changes to their programming in connection with the channel reform. This was no surprise in view of the fact that both companies had to build up full-service programming packages for their channels, YLE for two and MTV for one channel.

The main accent in TV1's programming is on news, current affairs, information and documentaries. TV2 concentrates on information and documentaries, films, serials and sports. MTV still leans more heavily towards entertainment than YLE, although it has diversified to an increasing extent since the reorganization in 1993. Channel Four is primarily oriented in its programming to entertainment. All channels have children's programmes, but most educational programmes appear on TV1. (Table 15.)

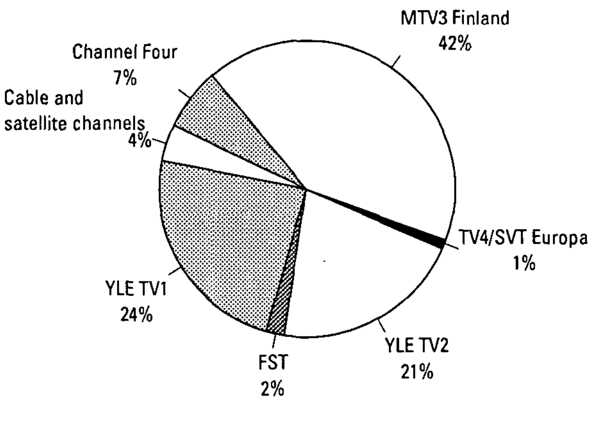
Domestic production accounts for a large part of the programming of both YLE and MTV. In 1997, 54 per cent of YLE's programming was domestic; the figure for MTV was the exactly same, 54 per cent. One-fifth of MTV's programmes were purchased from independent domestic production companies, while the corresponding share for YLE was only 8 per cent. (Table 16.) Except its news services, Channel Four, which was started up in 1997, purchases all its domestic programmes from independent production companies. – Some of the biggest so-called independent TV production companies in Finland (Table 6) are nowadays controlled by larger media houses. Also the world's biggest TV drama producer Grundy, which is part of the British Pearson Group, established a subsidiary in Finland in 1998.

YLE's and MTV's foreign programming differ from each other very clearly. In 1997, the majority of YLE's foreign programmes were of European origin, whereas most of MTV's foreign programming comes from North America. The representation of other continents is insignificant. (Table 17.)

In 1998 the combined average daily reach of YLE's two channels (TV1 and TV2) was 64 per cent of the population, or almost two out of three Finns aged 10 or over; the figures for TV1 and TV2 were 56 per cent and 49 per cent, respectively. The daily reach of MTV3 was 60 per cent, i.e. almost the same as the combined figure for the two YLE channels. The daily reach of Channel Four was 27 per cent and that of satellite channels 12 per cent. (Table 18.)

The average viewing times were 2 hours 29 minutes a day (not including video viewing). The annual figures have been increasing during the 1990s, but in 1996 the growth came to a halt. The two YLE channels take up 46 per cent of television viewing time (excluding video) and MTV 42 per cent. The channel share of Channel Four was 7 per cent in 1998. (Figure 2; Tables 20–23.)

Figure 2.2 Breakdown of television viewing by channel in 1998



Source: Table 2.22

Children and young people (aged 3 – 24 years) watch television much less than the average. After childhood and youth, television viewing increases steadily with age. (Tables 19, 21 & 23.)

The average reach of teletext services on an ordinary day is around 15 per cent of the population. The use of these services is higher than average among men and young people. (Tables 25 & 26.)

Just over 40 per cent of households had at least two television sets in 1998. It is estimated that there were a total of around 3.3 million television sets in homes, or 1.5 sets per household. In spite of the growing popularity of morning programmes, only four per cent of households had a television set in their kitchen. (Tables 29 & 30.)

Statistical sources

Most of the data on finances, broadcasting volumes and staff numbers of television companies are from the annual reports of the respective organizations.

Data concerning the programming structure of the companies are based on the companies' own reports.

Data on cable television operations in Finland are published annually by the Ministry of Transport and Communications.

Statistics on the number of households with a satellite is compiled by the Satellite and Antenna Association.

Statistics on television viewing are based on summary reports from year-round panel surveys conducted by Finnpanel Oy. The sample consists of 530 households and a total of 1 250 persons. The metered audience measurements have been jointly commissioned by YLE, MTV, Channel Four Finland and the Finnish Association of Advertising Agencies.

The data concerning the number and location of television sets in households are derived from extensive annual basic studies that have been carried out since 1995 by Finnpanel Oy to control the sample of metered audience measurements.

Tuomo Sauri

Figure

Tables

2.1 Nationwide television channels 1998

Status	Channel	Owner	Financing	Penetration	Distribution	Year of establishment
Public	YLE TV1	State	licence fees & fees from commercial channels	100	T/C	1958
	YLE TV2	State		100	T/C	1956/1965
	FST1&2 *	State		100	T/C	
	TV4/SVT Europa**	State		32	T/C	1988
Private	MTV3	Alma Media	commercials	100	T/C	1957
	Channel Four	Helsinki Media et al.	commercials	79	T/C/S	1997
	Canal+/Canal+ Gold	Canal+/Canal Digital	pay-TV	4	C/S	1986
	TV1000/Cinema	Modern Times Group	pay-TV	..	C/S	1996

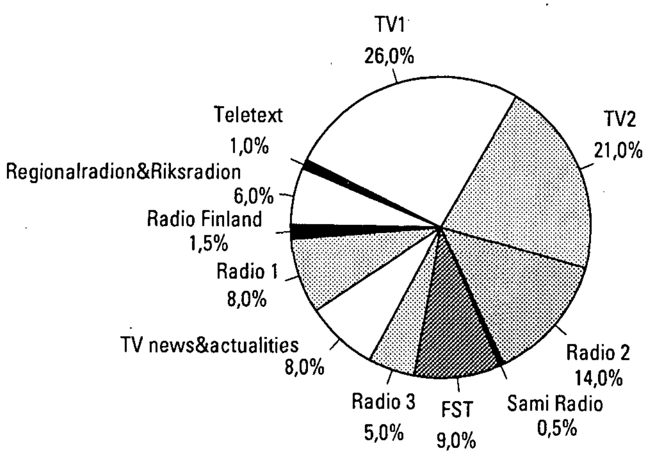
Distribution: T=terrestrial
C=cable
S=satellite

* *Swedish-speaking service transmitted in windows on YLE TV1 and YLE TV2.*

** *Swedish-speaking service retransmitting a digest of the Swedish public service channels' (SVT1 and SVT2) programming.*

Sources: YLE, MTV3, Channel Four

Figure 2.3 YLE allocation costs by channel 1997



Source: YLE/Information

2.2 YLE revenues 1980/81 – 1997

Year	Licence fees		Network rents and public service fees		Of which: Public service fees		Network rents		Government grants		Other* income		Total	Fixed (1998) prices
	FIM million	%	FIM million	%	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	1 325.8
1985/86	928.3	74.8	291.8	23.5	..	..	..	..	6.5	0.5	14.8	1.2	1 241.4	1 755.3
1986/87	1 010.2	74.7	312.0	23.1	..	..	..	..	12.5	0.9	16.9	1.2	1 351.6	1 843.6
1987/88	1 054.2	76.9	275.7	20.1	..	..	..	..	16.3	1.2	24.9	1.8	1 371.1	1 782.4
1988/89	1 127.4	77.2	293.4	19.0	..	..	..	..	11.4	0.8	27.5	1.9	1 459.8	1 779.4
1989/90	1 234.4	77.5	321.6	18.5			..	..	7.5	0.5	29.8	1.9	1 593.3	1 832.3
1990/91	1 364.8	81.1	272.6	14.3			..	..	7.8	0.5	38.5	2.3	1 683.7	1 858.8
1991/92	1 488.8	82.3	268.8	12.3			..	..	8.5	0.5	43.4	2.4	1 809.5	1 948.8
1993	1 481.2	79.8	300.0	16.2			..	..	9.2	0.5	66.3	3.5	1 856.7	1 957.0
1994	1 464.4	77.2	343.6	18.1	230.5	12.1	113.1	6.0	11.3	0.6	77.4	4.1	1 896.7	1 978.3
1995	1 491.5	75.9	403.1	20.5	290.6	14.8	112.5	5.7	3.6	0.2	67.5	3.4	1 965.4	2 028.3
1996	1 551.5	76.2	397.4	19.5	281.4	13.8	116.0	5.7	2.3	0.1	85.7	4.2	2 036.9	2 089.9
1997	1 546.5	77.6	..	..	..	..	..	..	..	..	..	..	1 993.6	2 021.5
1998	1 562.4	78.5	..	..	..	..	..	..	..	..	..	..	1 989.8	1 989.8

Until 1996 the totals describe turnover. The figures from 1997 onwards describe net revenue.

* *Mainly income from programming and technical services.*

Source: Yle annual reports

2.3 YLE costs 1994 – 1997

	1994	1995	1996	1997	
	FIM million				%
TV services	1 098	1 186	1 236	1 303	64
Radio services	615	644	648	669	33
Joint costs	207	108	40	74	4
Total	1 919	1 937	1 924	2 046	100

Source: YLE Finance

2.4 YLE TV programming costs 1998

	Total costs FIM million	Costs per hour MK – FIM
YLE TV1	483	124 000
YLE TV2	415	116 000
TV services in Swedish	176	193 000

Source: Yle annual report 1998

2.5 MTV, Channel Three and Channel Four turnover 1980 – 1998

Year	MTV FIM million	Channel Three FIM million	Channel Four FIM million	Total FIM million	Fixed (1998) prices FIM million
1980	237			237	522
1985*	501			501	733
1986	507			507	717
1987	517	..		517	705
1988	498	96		594	772
1989	536	127		663	808
1990**	675			675	776
1991	663			663	732
1992	706			706	760
1993	709			709	747
1994	810			810	845
1995	950			950	980
1996	975			975	1 000
1997	1 079		47	1 126	1 142
1998	1 068		134	1 202	1 202

* *As from 1985 of MTV Group.*

** *Channel Three started operating in 1987. 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: Company annual reports and other company data

2.6 Biggest independent TV production companies by turnover 1997

	FIM million	Staff
Solar Films	22.0	15
Crea Video	25.0	25
Broadcasters	16.0	15
Nordisk Film & TV	9.5	20
Juniper films	7.0	5
Fantasia Filmi	5.5	3
Visicom Turun Tietokuva	4.8	10
Production House	4.7	10
Filmiteollisuus	4.7	8
Media Active	4.7	6
10 biggest, total	103.9	117

The data cover member companies of SATU.

Source: Association of Independent Producers in Finland SATU

2.7 Cable television turnover 1985 – 1998

	1985	1990	1991	1992	1993	1994	1995	1996	1997	1998
	FIM million									
Connection charges	..	136	92	55	45	42	31	32	37	37
Subscription fees	..	89	114	127	124	133	145	148	154	174
Pay-tv revenue	..	55	70	102	98	101	101	117	114	119
Advertising on PTV channel*	..	13	15	16	22	26	35	41	–	–
Other advertising	..	4	3	4	3	3	3	4	2	1
Other income	..	17	7	17	13	22	21	32	34	33
Total	44	313	300	321	305	326	335	374	342	365
At fixed (1998) prices	64	360	331	346	321	340	346	384	347	365
	%									
Connection charges	..	43	31	17	15	13	9	9	11	10
Subscription fees	..	28	38	39	41	41	43	40	45	48
Pay-tv revenue	..	18	23	31	32	31	30	31	33	33
Advertising on PTV channel*	..	4	5	5	7	8	10	11	–	–
Other advertising	..	1	1	1	1	1	1	1	1	0
Other income	..	5	2	5	4	7	6	9	10	9
Total	..	100	100	100	100	100	100	100	100	100

* *PTV ceased operating in 1997.*

Source: Ministry of Traffic and Communications

2.8 YLE personnel 1989/90 – 1997 and staff breakdown by units 1997

	Employees on average			
	Radio only	Television only	Not separately attributable	Total
1989/90*	1 260	2 031	1 442	4 733
1990/91*	1 270	2 134	1 392	4 796
1991/92*	1 294	2 118	1 363	4 775
1993	1 322	2 086	1 176	4 584
1994	1 349	2 111	1 089	4 549
1995	1 327	2 113	1 095	4 535
1996	1 351	2 085	1 100	4 536
1997	1 390	2 137	1 131	4 658

	Personnel by sector 1997	%
Radio	1 117	24
TV	1 903	41
Swedish radio & tv	404	9
Central office	139	3
Transmission technology, personnel administration etc.	1 094	23
Total	4 657	100

* *YLE financial year was 1.6. – 31.5. until the year 1992.*

Source: YLE Personnel Administration

2.9 MTV and PTV/Channel Four personnel 1980 – 1997

Year	MTV	PTV/Channel Four
1980	567	
1985	702	
1986	696	
1987	667	
1988	586	
1989	625	
1990	621	15
1991	626	15
1992	606	20
1993	599	20
1994	617	21
1995	639	21
1996	648	23
1997	661	56

Source: MTV annual reports

2.10 Cable operators' personnel 1990 – 1997

	1990	1991	1992	1993	1994	1995	1996	1997
Full-time personnel*								
Programming	27	29	23	30	34	27	34	44
Technical	119	169	142	145	154	151	167	158
Administration & marketing	139	159	151	148	127	123	139	162
Total	285	398	316	323	315	301	340	364
	%							
Programming	9.5	7.3	7.3	9.3	10.8	9.0	10.0	12.1
Technical	41.8	42.5	44.9	44.9	48.9	50.2	49.1	43.4
Administration & marketing	48.8	39.9	47.8	45.8	40.3	40.9	40.9	44.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

* *Personnel under Sonera's cable networks are not included in the 1990 – 1995 figures.*

Source: Ministry of Communications, Communications Administration Department

2.11 Television licences 1980 – 1998

Year	B&W TV licences		Colour TV licences			
	'000	per 1 000 population	'000	per 1 000 population	TV licences total '000	per 1 000 population
1980	752.2	157	786.0	164	1 538.2	321
1985	344.6	70	1 439.7	293	1 784.3	363
1986	287.5	58	1 534.9	312	1 822.4	370
1987	236.7	48	1 606.2	326	1 842.9	374
1988	185.3	37	1 677.2	339	1 862.5	376
1989	147.3	30	1 731.9	349	1 879.2	379
1990	118.3	24	1 775.2	355	1 893.5	379
1991	96.3	19	1 801.0	358	1 897.3	377
1992	78.8	16	1 808.9	358	1 887.6	373
1993	64.4	13	1 801.7	355	1 866.1	368
1994	57.4	11	1 824.3	358	1 881.8	369
1995	50.6	10	1 864.8	364	1 915.4	374
1996	–	–	–	–	1 929.0	376
1997	–	–	–	–	1 947.4	378
1998	–	–	–	–	1 972.3	382

At year-end.

From january 1996 the colour and black-and-white licences were combined into one single TV-licence.

Source: Telecommunications Administration Centre

Figure 2.4 Coverage area of YLE TV1 and YLE TV2

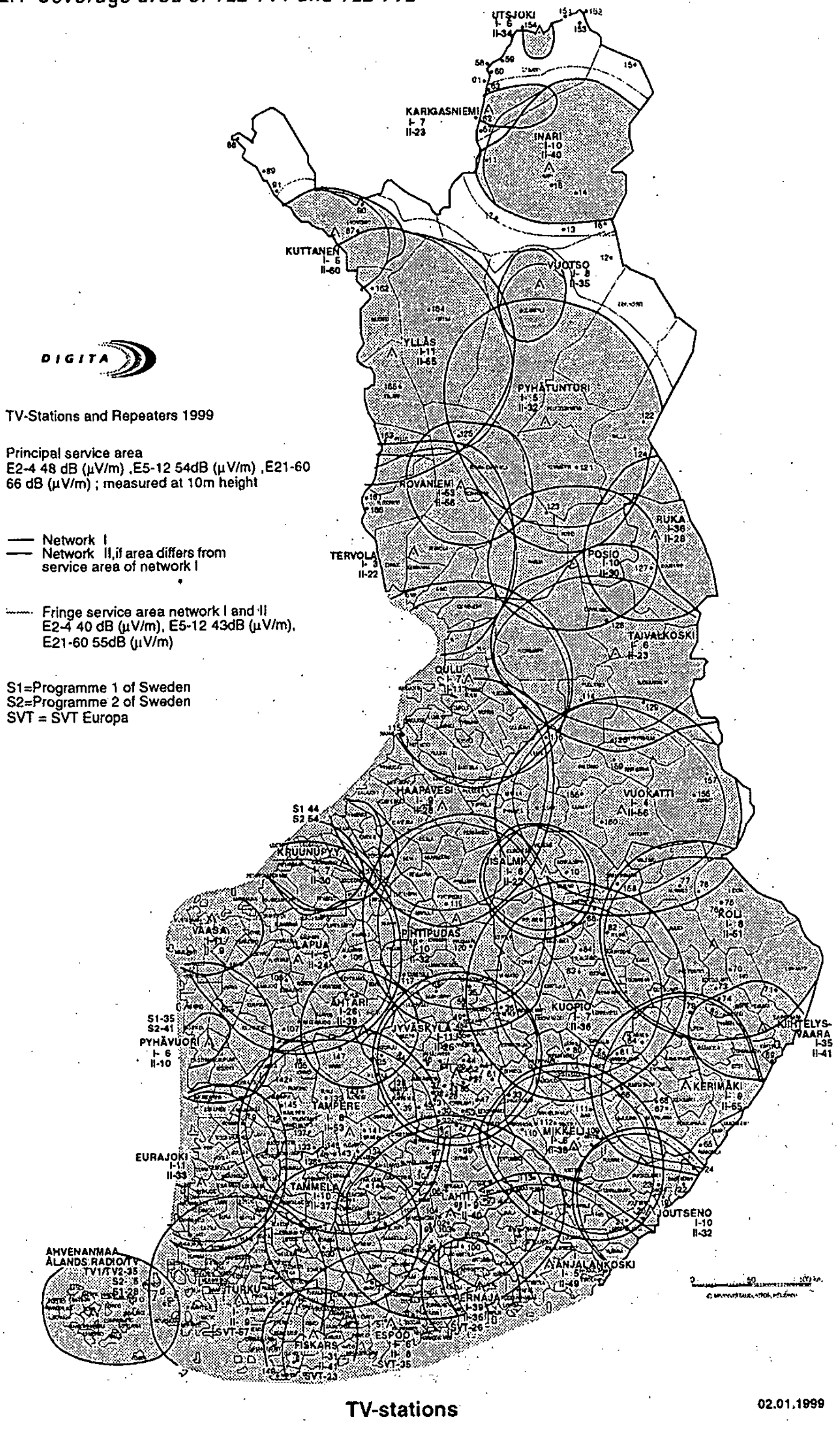
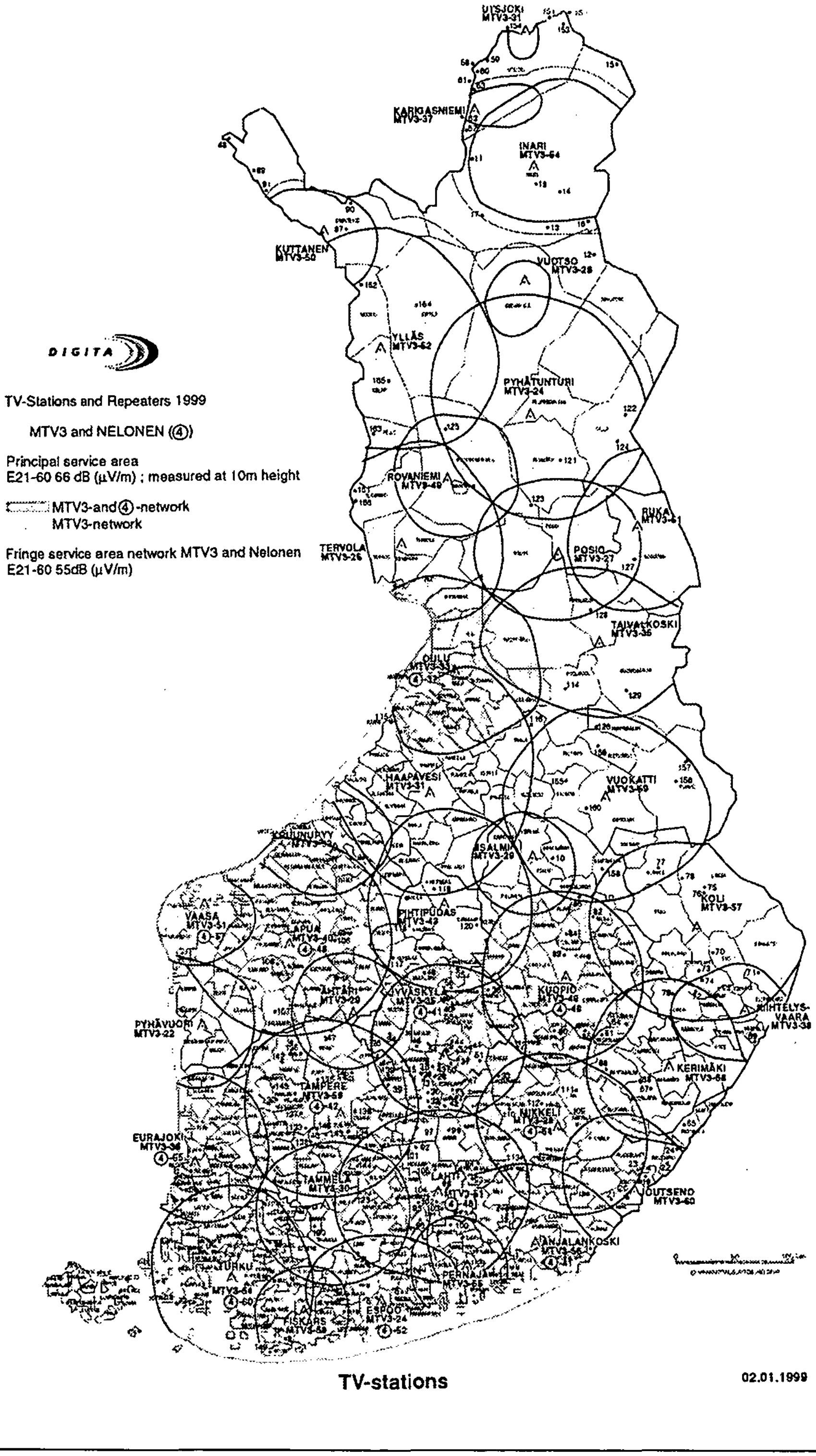


Figure 2.5 Coverage area of MTV3 and Channel Four Finland



2.12 Cable and satellite television connections 1980 – 1998

	Cable		Satellite*		Cable and satellite connections, total**	
	'000 connections	% of households	'000 connections	% of households	Total	% of households
1980	68.0	3.6	..	..	68.0	3.6
1985	210.0	10.4	..	..	210.0	10.4
1986	265.0	13.0	..	..	265.0	13.0
1987	375.0	18.0	10.0	0.5	382.0	18.3
1988	464.0	22.1	20.0	1.0	478.0	22.7
1989	556.0	25.9	30.0	1.4	578.0	26.9
1990	669.0	30.8	45.0	2.1	702.0	32.3
1991	722.1	32.9	60.0	2.7	767.7	34.9
1992	753.1	34.0	96.2	4.3	823.1	37.1
1993	759.6	33.9	126.2	5.6	850.6	37.9
1994	797.5	35.1	163.8	7.2	923.5	40.7
1995	817.1	36.7	196.8	8.6	973.9	42.5
1996	845.1	36.6	231.1	10.0	1 035.2	44.8
1997	875.1	37.6	261.3	11.2	1 095.4	47.1
1998	905.5	38.7	284.5	12.2	1 149.0	49.1

Not all connections are households.

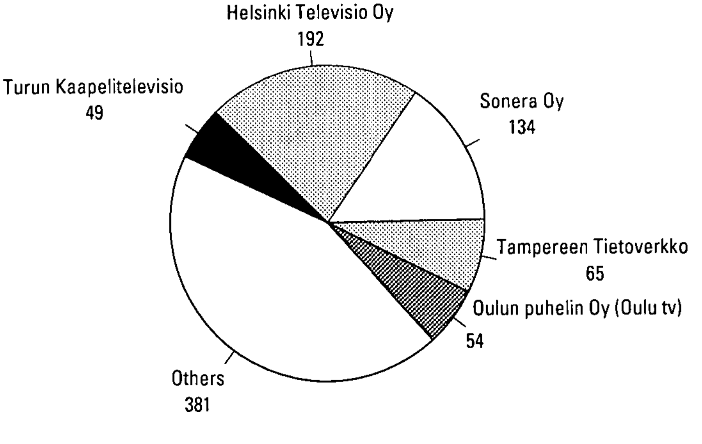
* *Direct to home (DTH) and satellite master antenna television (SMATV).*

** *Overlap in satellite and cable connections has been estimated and eliminated.*

Sources: Ministry of Traffic and Communications, Communications Administration Department.
Satellite and Antenna Association SANT

Figure 2.6 Biggest cable networks in 1997

'000 connections



Source: Ministry of Traffic and Communications

2.13 Major channels transmitted via cable networks 1990 – 1997

	'000 connections								Share of house-holds*	Share of households with access to cable*	Funding
	1990	1991	1992	1993	1994	1995	1996	1997	%	%	
Satellite channels:											
TV 5 Europe	566	647	685	710	750	779	806	858	36.9	98.1	public funding
NBC Europe	605	678	704	737	770	794	822	855	36.8	97.8	advertising
Eurosport	616	698	716	746	780	806	833	853	36.7	97.5	advertising
MTV-Europe	498	588	634	693	733	789	786	832	35.8	95.1	advertising
Deutsche Welle TV				173	204	439	463	513	22.1	58.6	public funding& advertising
Children's Channel								303	13.0	34.6	advertising
Euronews				1	212	224	231	279	12.0	31.9	public funding& advertising
Discovery								222	9.5	25.4	advertising
Neighbouring countries:											
Kanal 1 (Sweden)	248	213	213	209	164	168	216	276	11.9	31.5	public funding
TV 2 (Sweden)	246	206	205	202	128	122	165	212	9.1	24.2	public funding
TV 4 (Sweden)				53	76	90	89	64	2.8	7.3	advertising
ORTV (Russia)	402	..	188	189	29	29	27	26	1.1	3.0	advertising
ETV (Estonia)	165	..	..	14	12	14	12	25	1.1	2.9	public funding & advertising
Domestic cable channels:											
PTV		534	510	571	598	642	676	–	–	–	advertising
Local cable channels				158	145	148	247	480	20.6	54.9	advertising
Moon TV								215	9.2	24.6	advertising
Pay TV channels:											
Canal Plus Gold**		50	44	43	39	44	42	42	1.8	4.8	subscription fees
Canal Plus**				39	38	40	38	41	1.8	4.7	subscription fees

* *Not all connections are households. At year-end 1997 the total number of connections with access to cable television was 875 000.*

** *Until 1996 FilmNet Plus and FilmNet Movies. The subscribers of Canal Plus and Canal Plus Gold largely overlap.*

Sources: Ministry of Transport and Communications
Finnish Cable Television Association

2.14 YLE, MTV and Channel Four: weekly broadcasting hours by channels 1980/81 – 1997

Year	YLE TV 1	YLE TV 2	MTV 1	MTV 2	MTV3*	Channel Four
	Hours/week					
1980/81	40	29	13	4	–	–
					–	–
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	–	–	70	–
1994	82	57	–	–	82	–
						–
1995	86	63	–	–	94	–
1996	88	68	–	–	106	–
1997	104	75	–	–	128	59

* *Until 1992 Channel Three.*

Sources: Company annual reports

2.15 Television programming in Finland 1993 – 1997

	1993	1994	1995	1996	1997
	%				
YLE TV1					
News	10	8	12	11	14
Current affairs	8	7	9	11	15
Non-fiction/information	26	23	20	17	16
Drama/TV film	2	4	..	3	3
Feature film	10	8	12	11	10
Serial drama	11	11	11	10	11
Entertainment and music	12	9	11	8	5
Sports	6	11	8	13	7
Children	6	4	6	7	8
Education	9	13	10	9	9
Other	0	1	1	0	1
Total	100	100	100	100	100
Total programming hours	3 960	4 265	4 493	4 590	5 386
YLE TV2					
News	4	3	3	3	3
Current affairs	5	5	7	7	7
Non-fiction/information	23	25	28	27	27
Drama/TV film	4	7	..	3	3
Feature film	13	9	13	12	13
Serial drama	16	17	18	20	20
Entertainment and music	12	12	13	9	9
Sports	12	12	10	11	11
Children	9	9	7	7	6
Education	0	0	0	0	0
Other	3	2	1	1	1
Total	100	100	100	100	100
Total programming hours	3 124	2 962	3 275	3 517	3 910
MTV3					
News	8	7	6	6	5
Current affairs and non-fiction/information	22	25	26	24	23
Drama/TV film, serial drama and feature film	37	35	36	33	39
Entertainment and music	19	17	18	20	21
Sports	8	11	9	12	7
Children	5	3	4	5	4
Education	0	1	1	1	1
Other	1	2	0	0	0
Total	100	100	100	100	100
Total programming hours	3 133	3 418	3 928	4 487	5 372
Nelonen – Channel Four*					
Current affairs	–	–	–	–	7
Other non–fiction	–	–	–	–	18
Feature film	–	–	–	–	12
Serial drama	–	–	–	–	26
Entertainment	–	–	–	–	15
Talk show	–	–	–	–	7
Sports	–	–	–	–	10
Children	–	–	–	–	4
Total					100

* *Channel Four data cover October to end of December 1997 only. The figures are estimates based on programme slot data.*

Sources: YLE, MTV3, Channel Four

2.16 TV-programming: own vs bought production in YLE & MTV/MTV3 channels 1991 – 1997

	1991	1992	1993	1994	1995	1996	1997
	%						
YLE TV1 & TV2							
Inhouse	48	47	50	51	47	44	46
Bought domestic	6	7	7	8	7	8	8
Foreign	46	46	43	41	46	48	46
Total	100	100	100	100	100	100	100
YLE TV1							
Inhouse	..	..	..	..	..	47	50
Bought domestic	..	..	..	..	..	7	8
Foreign	..	..	..	..	..	46	42
Total	..	..	..	..	..	100	100
YLE TV2							
Inhouse	..	..	..	..	..	40	41
Bought domestic	..	..	..	..	..	10	8
Foreign	..	..	..	..	..	50	51
Total	..	..	..	..	..	100	100
MTV/MTV3							
Inhouse	..	28	35	36	37	37	34
Bought domestic	..	18	18	19	18	21	20
Foreign	56	54	47	44	44	42	46
Total	100	100	100	100	100	100	100

Sources: YLE, MTV3

2.17 YLE and MTV/MTV3 television programming by origin 1991 – 1997

	1991	1992	1993	1994	1995	1996	1997
	%						
YLE TV1 & TV2							
Finland	54	54	57	59	54	52	54
Other Nordic countries	6	5	4	6	7	8	5
Other Europe	26	27	22	17	18	19	23
North America	10	9	12	14	17	19	16
Other	4	5	4	4	5	2	2
Total	100	100	100	100	100	100	100
Total programming hours	5 195	5 359	7 084	7 228	7 768	8 108	9 296
YLE TV1							
Finland	..	..	..	..	..	54	58
Other Nordic countries	..	..	..	..	..	7	5
Other Europe	..	..	..	..	..	19	23
North America	..	..	..	..	..	18	12
Other	..	..	..	..	..	2	2
Total	..	..	..	..	..	100	100
Total programming hours	..	..	..	..	..	4 590	5 386
YLE TV2							
Finland	..	..	..	..	..	50	49
Other Nordic countries	..	..	..	..	..	8	5
Other Europe	..	..	..	..	..	19	21
North America	..	..	..	..	..	21	23
Other	..	..	..	..	..	2	2
Total	..	..	..	..	..	100	100
Total programming hours	..	..	..	..	..	3 517	3 910
MTV/MTV3							
Finland	44	46	53	56	56	58	54
Other Europe*	..	..	5	7	6	8	10
North America	..	..	37	30	34	32	33
Other	..	..	0	0	1	1	2
No information available**	56	54	4	7	3	1	1
Total	100	100	100	100	100	100	100
Total programming hours	..	3 146	3 133	3 418	3 928	4 487	5 372

* *Including other Nordic countries.*

** *Consisting mostly of international sports programming during the period 1993-1997.*

Sources: YLE, MTV3.

2.18 Daily reach of television channels 1990 – 1998

Population aged 10+	1990 %	1991	1992	1993	1994	1995	1996	1997	1998
YLE TV1	51	53	54	53	55	55	56	55	56
YLE TV2	38	41	42	46	47	47	48	48	49
YLE total*	59	60	62	62	64	63	65	64	64
MTV1 & MTV2	48	49	49	–	–	–	–	–	–
Channel Three	19	26	41	–	–	–	–	–	–
MTV3 Finland	–	–	–	59	61	60	61	60	60
Channel Four**	–	–	–	–	–	–	–	10	27
PTV4**	2	3	4	5	6	9	9	..	–
TV4 / SVT Europa	1	2	2	2	3	3	3	3	3
SVT 1&2	2	3	3	3	3	2	2	2	2
Satellite	6	8	9	10	11	12	12	12	12
Other	0	0	1	1	1	0	1	1	1
TV total	..	..	**69**	**71**	**72**	**71**	**72**	**72**	**71**

The data 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.
* *The YLE total figures also cover programming in Swedish by YLE's Finlands Svenska Television (FST) on channels TV1 and TV2.*
** *PTV4 until end of May 1997. Channel Four from June 1997 onwards.*

Sources: Finnpanel Oy
YLE Research and Development

2.19 Daily reach of television channels by population groups 1998

	1998 YLE TV1 %	YLE TV2	YLE Total	MTV3	Channel Four	TV4/SVT Europa	SVT 1&2	Satellite	Others
All	56	49	64	60	27	3	2	12	1
Sex									
Women	55	49	64	62	26	3	2	10	1
Men	56	49	63	59	27	3	3	15	1
Age									
3 – 9*	30	30	45	31	11	1	2	6	1
10 – 14	41	36	51	51	22	1	2	10	1
15 – 24	34	32	44	47	21	1	2	12	0
25 – 34	48	44	56	56	29	2	3	13	2
35 – 44	57	51	66	62	30	3	4	13	1
45 – 64	63	54	70	63	26	3	2	11	1
65 –	74	64	79	75	28	7	3	12	2
Greater Helsinki area	53	42	60	54	32	8	0	18	0
Other big cities	54	49	62	60	37	2	4	21	0
Small cities	59	53	67	65	28	2	4	16	2
Other densely populated areas	57	51	65	62	21	1	2	4	1
Open countryside	52	45	59	54	17	1	2	4	1

* *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 by channel 1990 – 1998

Population aged 10+	1990	1991	1992	1993	1994	1995	1996	1997	1998
	Minutes/day								
YLE TV1	34	37	35	31	34	35	38	36	36
YLE TV2	22	22	22	27	27	28	31	33	31
FST*	3	3	2	2	2	2	3	3	2
YLE total	59	62	60	60	63	66	72	72	69
MTV1 & MTV2	27	26	24	–	–	–	–	–	-
Channel Three	13	18	29	–	–	–	–	–	–
MTV3 Finland	–	–	–	61	64	65	66	65	63
Channel Four (1.6.1997–)	–	–	–	–	–	–	–	4	11
Domestic cable**	1	1	1	2	2	3	4	2	0
TV4/STV Europa	1	2	2	2	2	2	2	2	1
Satellite	3	3	4	6	6	5	5	5	5
Other	0	0	0	0	0	0	0	1	0
All channels total	104	112	119	130	138	140	149	149	149
Video	10	11	11	10	10	10	11	8	6
TV plus video total	109	118	126	139	149	150	160	157	155

The data 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.

* *The figures cover programming in Swedish by YLE's FST on channels TV1 and TV2*

** *PTV4 included until end of May 1997.*

Sources: Finnpanel Oy
YLE Research and Development.

2.21 Daily average television viewing time by population groups by channel 1998

	YLE TV1	YLE TV2	FST	YLE total	MTV3	Channel Four	Domestic cable	TV4/SVT Europa	SVT 1 & 2	Satellite	Others	Total minutes
	Minutes/day											
All	36	31	2	69	63	11	0	0	1	5	0	149
Sex												
Women	35	31	2	68	72	11	0	0	1	4	0	156
Men	37	31	2	70	54	10	0	0	1	7	0	142
Age												
3 – 9*	14	15	1	30	20	4	0	0	1	3	0	58
10 – 14	15	15	1	31	41	9	0	0	1	3	1	86
15 – 24	13	13	1	27	45	10	0	0	0	6	0	88
25 – 34	26	25	2	53	55	13	0	0	1	5	1	128
35 – 44	32	31	2	65	60	13	0	0	1	6	1	146
45 – 64	46	36	3	84	67	9	0	0	1	5	0	166
65 –	60	49	4	113	93	10	1	2	2	5	1	227
Greater Helsinki area	34	26	3	63	54	15	0	1	0	8	0	141
Other big cities	33	28	2	63	58	15	1	0	1	9	0	147
Small cities	38	33	3	74	66	11	1	1	1	6	1	161
Other densely populated areas	36	33	2	71	71	8	0	0	1	1	1	153
Open countryside	33	28	2	63	53	6	0	0	1	3	0	126

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

Sources: Finnpanel Oy
YLE Research and Development.

2.22 Television: channel shares 1990 – 1998

	1990	1991	1992	1993	1994	1995	1996	1997	1998
Population aged 10+	%								
YLE TV1	33	33	30	24	25	25	25	24	24
YLE TV2	21	19	19	21	19	20	21	22	20
FST*	3	3	2	1	2	2	2	2	2
YLE total	57	55	50	46	46	47	48	48	46
MTV1 & MTV2	26	23	20	–	–	–	–	–	–
Channel Three	13	16	24	–	–	–	–	–	–
MTV3 Finland	–	–	–	47	46	46	44	44	42
Channel Four (1.6.1997–)	–	–	–	–	–	–	–	2	7
Domestic cable**	1	1	1	1	2	2	3	1	0
SVT 1&2	1	2	2	2	2	1	1	1	1
Satellite	3	3	3	4	4	4	3	3	4
All channels total	100	100	100	100	100	100	100	100	100
Video	5	5	6	7	8	7	7	6	4
TV plus video total	100	100	100	100	100	100	100	100	100
Average viewing time, min/day	109	118	126	139	149	150	160	157	155

The data 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.

* *The figures cover programming in Swedish by YLE's FST on channels TV1 and TV2*

** *PTV4 included until end of May 1997.*

Sources: Finnpanel Oy

YLE Research and Development

2.23 Television: channel shares by population groups 1998

	YLE TV1	YLE TV2	FST	YLE total	MTV3	Channel Four	Domestic cable	TV4/SVT Europa	SVT 1&2	Satellite	Total
	%										
All	24	20	2	46	42	7	0	0	1	4	100
Sex											
Women	22	20	2	43	46	7	0	0	1	2	100
Men	26	22	2	49	38	7	0	0	1	5	100
Age											
3 – 9*	23	25	3	51	34	8	0	0	2	4	100
10 – 14	18	18	1	36	48	10	0	0	1	4	100
15 – 24	14	15	1	30	51	11	0	0	0	7	100
25 – 34	20	20	2	41	43	10	0	0	1	4	100
35 – 44	22	21	2	44	41	9	0	0	1	4	100
45 – 64	27	22	2	50	40	6	0	0	1	3	100
65 –	27	22	2	50	41	4	0	1	1	2	100
Greater Helsinki area	24	19	2	45	38	10	0	1	0	6	100
Other big cities	22	19	2	43	39	10	1	0	1	6	100
Small cities	24	21	2	46	42	7	0	0	1	4	100
Other densely populated ares	23	22	1	47	46	5	0	0	1	1	100
Open countryside	26	22	1	50	42	5	0	0	1	2	100

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

Sources: Finnpanel Oy
YLE Research and Development.

2.24 Top ten television programmes 1998

Programme	Date	Audience '000	Rating* %
YLE TV1			
Newscast	06.12.	2 060	46
Independence Day celebration	06.12.	1 880	42
Domestic drama	05.01.	1 480	33
Sports news	08.02.	1 300	29
Ice hockey world championship	14.05.	1 210	27
Special newscast	08.02.	1 210	27
Eurovision Song contest	14.02.	1 210	27
Domestic drama	27.04.	1 120	25
Lottery	20.02.	1 080	24
Eurovision Song contest	09.02.	1 030	23
YLE TV2			
Domestic entertainment	01.01.	1 260	28
Newscast	23.08.	1 210	27
Domestic comedy	25.02.	1 170	26
European championship in athletics	23.08.	1 170	26
Ice hockey world championship	12.05.	1 080	24
Junior ice-hockey world championship	03.01.	1 080	24
Domestic entertainment	13.02.	1 080	24
Weather forecast	05.02.	1 080	24
Football world championship	12.07.	1 030	23
Police TV	29.01.	1 030	23
MTV/MTV3 Finland			
Miss Finland beauty contest	15.02.	1 625	36
Domestic entertainment	29.03.	1 411	31
Current affairs	23.02.	1 386	31
Domestic series	06.01.	1 352	30
Current affairs	06.01.	1 349	30
Bold and beautiful	23.03.	1 278	28
Miss Scandinavia beauty contest	12.03.	1 261	28
Newscast	19.10.	1 256	28
Newscast	06.01.	1 250	28
Formula 1 Brasilian GP	30.03.	1 200	27
Nelonen – Channel Four			
Forrest Gump	27.12.	482	11
Bridges of Madison County	29.11.	441	10
Domestic series	05.04.	439	10
A Few Good Men	03.05.	435	10
Cliffhanger	26.12.	426	9
Crocodile Dundee II	06.11.	420	9
Titanic	28.03.	417	9
A League Of Their Own	28.12.	391	9
Richie Rich	05.04.	373	8
On The Buses	10.11.	362	8

* *Shares of persons aged 10 years or over*

Sources: Finnish Broadcasting Company, MTV3, Nelonen

2.25 Use of teletext services: Daily reach and average viewing time 1996 – 1998

	1996	1998	1996	1998
	%		min.	
All	12	16	5	5
Sex				
Women	8	9	4	3
Men	15	24	6	6
Age				
15 – 24 years	15	18	8	8
25 – 44 years	12	19	5	4
45 – 59 years	11	14	5	6
60 – years	9	10	3	4

Source: MDC Helsinki Group – Media Research Ltd.

2.26 Most popular YLE and MTV teletext pages 1997

YLE

Top 5	%
Domestic news	40
Sports results	38
TV program schedules	38
Weather	37
Lottery results	28

MTV3

Top 5	%
TV program schedules	28
Domestic news	21
Front page	17
Weather	16
Formula 1 race	15

Sources: Taloustutkimus Oy
YLE
MTV3

2.27 Retail sales of TV sets 1980 – 1997

	1980	1985	1990	1991	1992	1993	1994	1995	1996	1997	Change 1997/96
	1 000 units										%
Colour television sets	155	200	285	285	230	169	189	228	255	249	–2.4
B & W television sets	72	28	..	..	..	..	..	..	..	..	..
Satellite dishes					8	14	17	11	12	17	41.7

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

2.28 TV sets: average prices and sales volume 1980 – 1997

		1980	1985	1990	1991	1992	1993	1994	1995	1996	1997	Change 1997/96 %
Colour television sets	Average price FIM	2 950	2 750	2 750	2 700	2 700	3 250	3 250	3 100	2 900	3 100	6.9
	Sales volume FIM million	457	550	784	770	621	549	614	707	740	774	4.6
B & W television sets	Average price FIM	800	700	..	..	..	..	..	..	..	..	
	Sales volume FIM million	58	20	..	..	..	..	..	..	..	..	
Satellite dishes	Average price FIM					5 000	3850	2 700	2 250	2 100	2 500	19.0
	Sales volume FIM million					40	54	46	25	25	43	72.0

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

2.29 Household TV-equipment 1995 – 1998

	All households				Cable & satellite households			
	1995	1996	1997	1998	1995	1996	1997	1998
	%							
No TV	4	5	5	4	–	–	–	–
1 TV set	58	55	54	53	59	58	55	58
2 TV sets	30	31	32	33	32	33	35	32
3+ TV sets	8	9	10	11	9	9	10	10
Colour TV	92	93	93	93	97	98	98	97
B&W TV	8	6	5	5	7	5	6	4
Stereo TV	31	40	48	51	39	47	55	57
Remote control	69	76	82	83	78	86	90	90
Teletext	44	52	59	61	51	59	67	67
Pay TV decoder	3	4	4	5	7	9	9	11
Satellite receiver	3	2	5	4	7	6	11	9
PC with TV reception possibility	1	0	1	1	1	1	2	1
Portable TV	19	19	19	19	21	19	20	18

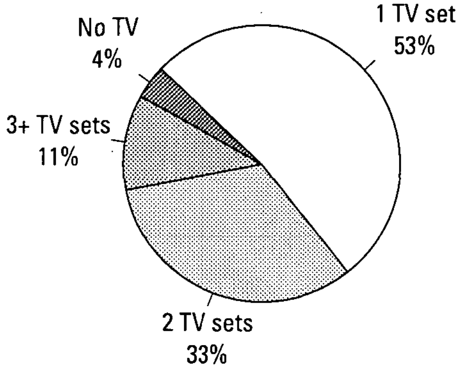
Source: Finnpanel Oy, TV-household surveys

2.30 Locations of TV-sets in households 1995 – 1998

	1995	1996	1997	1998
	%			
Living room	88	87	88	88
Bedroom	19	20	23	24
Children´s rooms	12	13	14	16
TV-room	4	4	6	6
Kitchen	3	3	4	4
Other room	12	12	12	12

Source: Finnpanel Oy, TV-household surveys

Figure 2.7 Household ownership of TV-sets in 1998



Source: Table 2.29

3 Radio

The radio scene in Finland has changed completely since the mid-1980s. The first commercial local radio stations went on the air in 1985. Following a brief trial period, the number of private stations increased very rapidly. The number peaked in 1990 at almost 70; since then the figure has slightly come down. The coverage of local radio stations (which means the number of people who have access to any commercial local radio station) is estimated at around four million; this means that around four in five people in the country live within the coverage area of some local radio station.

Financially, the whole of the 1990s has been an uphill struggle for commercial local radio stations. Neither the major restructuring exercise nor the arrival of new chains of commercial stations have helped to inspire strong growth in the sector. In recent years the turnover of the sector has been at a much lower level than before the severe economic recession in the early 1990s (Figure 3), accounting for no more than around one per cent of the total turnover of the mass media sector in Finland.

Major steps have been taken towards deregulation in recent years in order to improve the financial prospects of commercial radio broadcasting. Requirements concerning local broadcasting have been significantly slackened to allow for closer cooperation between individual stations as well as the setting up of chains of local radio stations. In addition licences have been issued to format radios operating in different localities. In 1994 licences were granted to Classic FM (Great Western Radio) and to Kiss FM (Scandinavian Broadcasting System), which broadcast identical programmes in several cities. In spring 1999 four further companies were granted licences for a similar operation, and the French company NRJ which used to operate only in the metropolitan Helsinki region was now given the go-ahead to expand to other cities as well. Spring 1999 also saw the formation of Radio Plus, the biggest chain of network cooperation: a total of 13 local radio stations are involved.

The country's first nationwide commercial radio station received its operating licence in autumn 1996: Radio Nova went on the air in spring 1997. Radio Nova has grown very rapidly and become a serious challenge to YLE's nationwide channels and to local radio stations as well. Radio Nova's biggest shareholder with a 48% stake is Alma Media, Finland's second-largest media company.

In response to the growing competition in the mid-1980s, the public service broadcaster YLE decided to increase its air-time and to re-profile its radio programming. YLE also upgraded its third channel into a nationwide network. At the same time YLE greatly increased the volume of its regional programming.

In 1990 YLE pursued this re-profiling even further, setting up YLE Radio 1 as a station for classical music and culture programmes; Radio 2 (or "Radiomafia") was re-profiled as a young people's pop and rock channel; and Radio 3 (or "Radio Finland") was set up as a news, current affairs and regional programmes channel. Additionally, Swedish-language programming was reorganized in autumn 1997 into two channels. Radio Vega is intended for more mature audiences, resembling a full-service channel. Radio Extrem is aimed at younger listeners.

In addition, YLE has started digital radio broadcasting in autumn 1998. The programming for the digital talk radio channel Radio Peili ("Radio Mirror") is compiled from the programmes broadcast by YLE on its analogue nationwide channels. The start-up has been slowed down by the poor availability and the high price of receivers, and therefore, in parts of southern Finland, the channel decided to broadcast in analogue format as well. In early spring 1999 the number of receivers in use was no more than a few dozen.

In terms of economic volume the radio operations of the public service broadcaster YLE are about 3 times greater than in commercial broadcasting (with programming costs for 1998 standing at about FIM 670 million) (Table 2). The difference in the scale of the operations and in resources is also clearly reflected in staff numbers. In recent years staff numbers in YLE's radio operations have slightly increased. In 1997 there was a permanent staff of around 1,400. The corresponding figure for local radio stations was around 500, with the number of staff working on a freelance basis down to 350. Staff numbers have steadily declined in the commercial radio sector throughout the 1990s. (Tables 8 & 9.)

Local radio stations get around 90 per cent of their takings from advertising (Table 4). In 1997 radio accounted for 3.5 per cent of total media advertising, which is one percentage point less than at the beginning of the decade. In Western European countries radio accounts on average for some 5 per cent of total media advertising (cf. Table 3 in Chapter 12).

Although some 30 commercial local radio stations have been closed down or merged with other stations during 1990–98, the total number of operators has remained more or less unchanged as new actors have turned up to take on the challenge. 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. During the years of recession in the early 1990s, however, stations also went under in larger towns that had two or more rival stations.

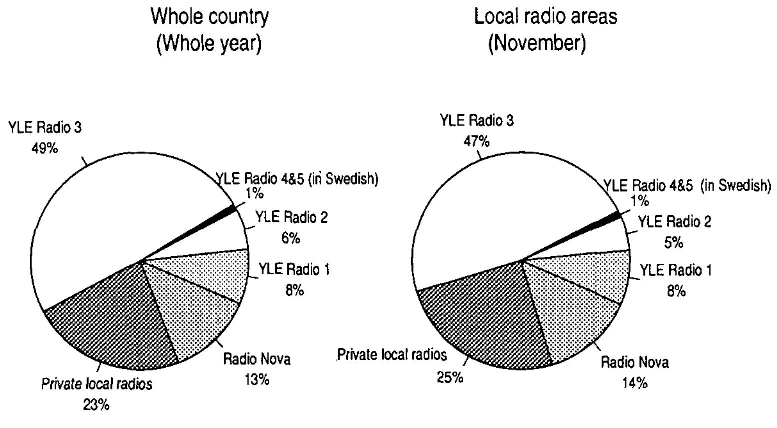
The competition for advertisers' money has intensified further with the arrival of format radio stations operating in several different areas (Kiss FM/SBS & Classic FM/GWR) and with the start-up of the nationwide commercial station Radio Nova. The competition is fiercest in the Helsinki metropolitan region where there are now a dozen or so radio stations that are commercially financed.

The start-up of Radio Nova was a great success. During its first six months on the air its audience share in its primary target groups (the audience aged 25–44) was one-quarter. The losses have been felt equally by YLE's public service radio channels and by local radio stations. (Tables 18 & 19.)

It was through local radio stations that the concept of broadcast flow was introduced in Finland. YLE has also adopted this concept on some of its channels. In line with international trends, music has become the most important element in creating the profile and style of many Finnish radio stations. Music is also a crucial part of the programming on YLE's channels (cf. Table 13). YLE's youth channel Radiomafia has followed the example of many commercial stations and adopted the selector or weekly playlist system which identifies the songs that may be broadcast by on-air personnel.

The volume of radio broadcasting in Finland is quite impressive. In 1996, YLE's weekly broadcasting through its five nationwide channels amounted to around 650 hours. The growth has been fastest for regional programming, increasing almost five-fold from less than 200 weekly hours in the mid-1980s (operational year 1985/86) to almost 900 weekly hours in 1997. As the majority of private radio stations operate around the clock, their combined weekly broadcasting volume probably amounts to almost 10 000 hours. (Tables 10–12.)

Figure 3.1 Channel shares in radio listening 1998



Source: Table 3.18

During the early 1980s there was a clear drop in the total 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. In recent years the daily reach of radio has been at around 80 per cent of the population, but during the past couple of years the figure has slightly dropped. (Table 14.)

The beginning of local radio brought a significant increase in average listening times. Towards the end of the 1980s average daily listening times increased from over two to over three hours. Since YLE's radio reform listening times increased even further, peaking at almost four hours a day. More recently the figure has slightly declined again, and now stands at 3 hours and 20 minutes a day. (Table 16.)

In 1998 people spent about 2 hours listening to YLE's channels every day. The nationwide commercial station Radio Nova took up half an hour and other commercial radio stations around 45 minutes of the average daily listening time. (Table 16.)

In 1998 households had on average 3.4 radio sets, with the total estimated number of sets in households standing at around 7.5 million. Table 22 shows the rooms in which radio sets are mostly used in Finnish homes.

The factor that best explains radio listening is age. Older age groups spend much more time with the radio than do younger people. (Tables 15, 17 & 19.)

Statistical sources

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

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

Commissioned by the Ministry of Transport and 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.

In previous years YLE used to conduct diary studies a few times a year to study patterns of radio listening. The samples for these studies comprised over 1 000 people in the population aged over 9. Since 1991 the most important listening survey has been Finnpanel's National Radio Survey, the materials of which are used by YLE and the Association of Finnish Broadcasters in their own reporting.

The data on the number and location of radio sets in households come from the extensive baseline surveys conducted by Finnpanel for its TV-meter study.

Tuomo Sauri

Figures

Tables

3.1 Radio channels and stations 1998

Coverage	Status	Channel/station	Organisation	Financing	Year of establishment
National	Public	Ylen Ykkönen	YLE	licence fees	1926/1990
		Radiomafia	YLE	licence fees	1990
		Radio Suomi	YLE	licence fees	1965/1990
		Radio Vega	YLE	licence fees	1961/1997
		Radio Extrem	YLE	licence fees	1997
	Private	Radio Nova	Suomen Uutisradio	commercials	1997
Regional	Public	26 regional windows	YLE	licence fees	
		– 20 in Finnish			1975–
		– 5 in Swedish			1973–
		– 1 in Sami			1987
Local	Private	60 local stations	*	mainly commercials	1985–

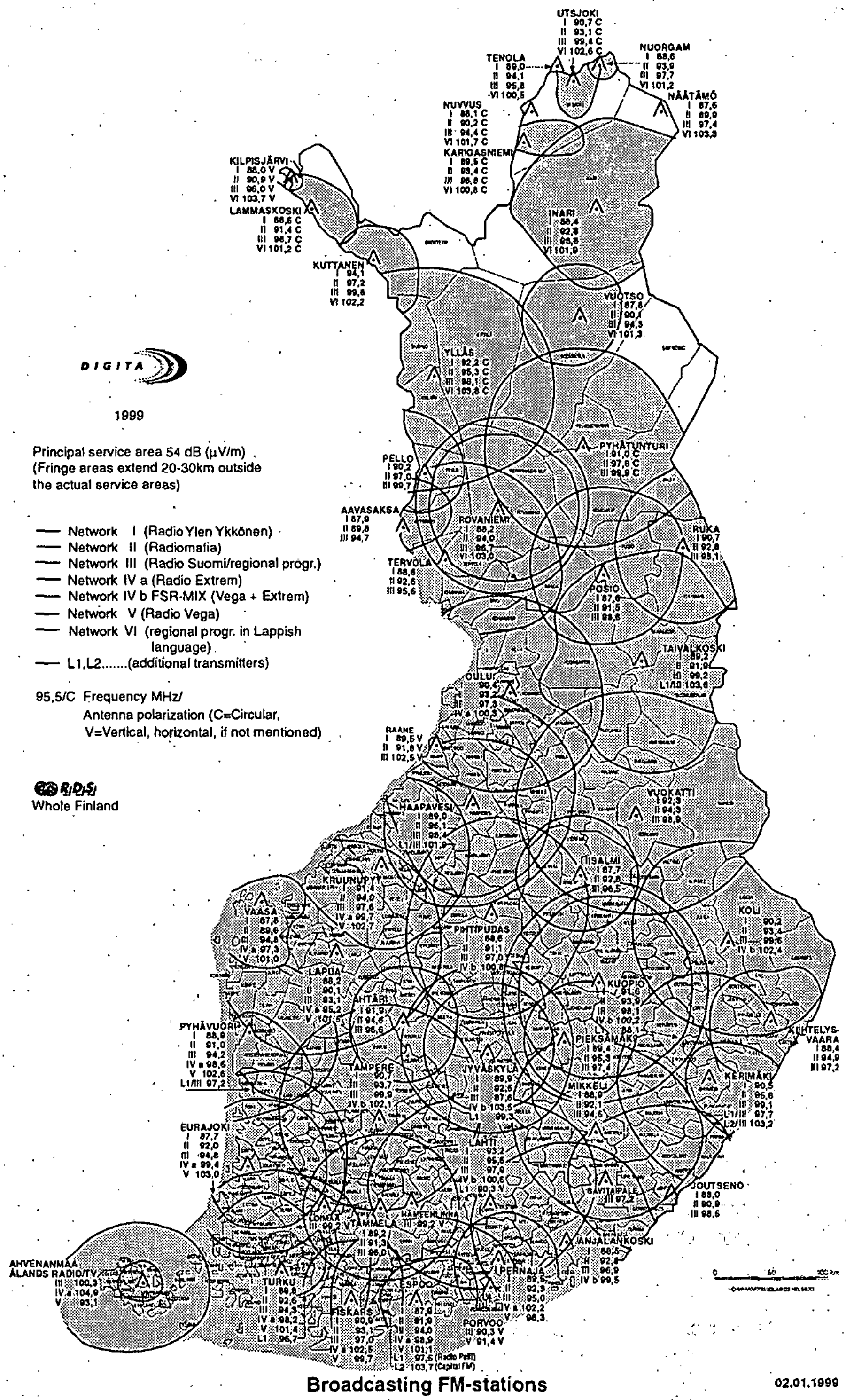
Source: YLE
Association of Finnish Broadcasters

3.2 YLE radio programming costs 1998

	Total costs FIM million	Programming costs per hour FIM
YLE Radio 1	158	18 000
YLE Radio 2	83	9 500
YLE Radio 3	266	5 500
YLE Radio 4 (in Swedish)	80	8 100
YLE Radio 5 (in Swedish)	42	6 200
Sami Radio	10	4 900
Foreign service broadcasts - Radio Finland	25	600

Source: Yle annual report 1998

Figure 3.2 Coverage areas of YLE radio channels



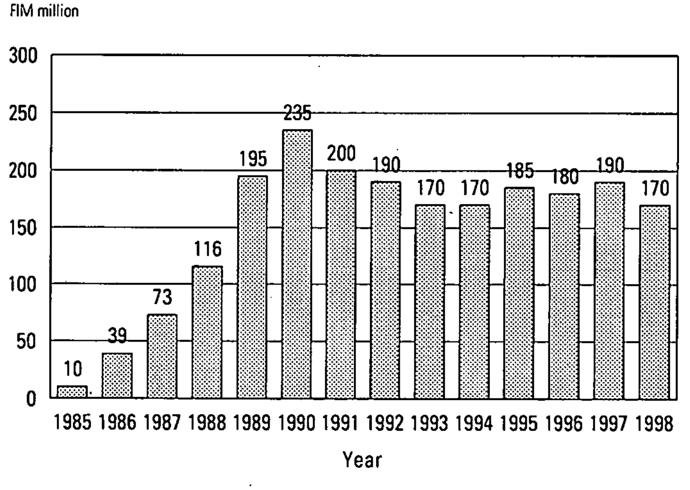
3.3 Turnover of Radio Nova and private local radio stations 1985 – 1998

	Radio Nova	Local radios	Total Current prices	Fixed (1998) prices
			FIM million	
1985		10	10	15
1986		39	39	55
1987		73	73	100
1988		116	116	151
1989		195	195	238
1990		235	235	270
1991		200	200	221
1992		190	190	205
1993		170	170	179
1994		170	170	177
1995		185	185	191
1996		180	180	185
1997	13	190	203	206
1998	55	170*	225*	225

* *Estimates.*

Source: Statistics Finland
Alma Media annual reports
Association of Finnish Broadcasters

Figure 3.3 Turnover of private local radio stations 1985 –1997



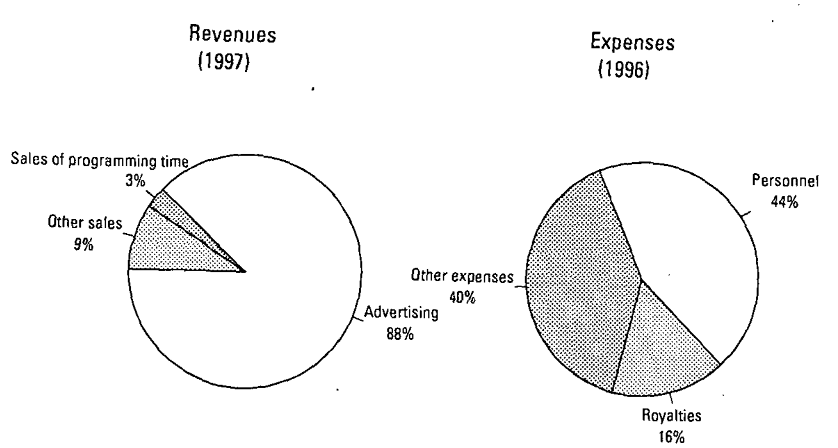
Source: Association of Finnish Broadcasters

3.4 Breakdown of local radio stations' revenues and expenses 1992 – 1997

	1992 %	1993	1994	1995	1996	1997
Revenues						
Advertising						
– local	83	82	86	79	85	83
– national	8	6	5	11	7	5
Sales of programming time	2	2	2	2	3	3
Other sales	7	10	7	8	5	9
Total	100	100	100	100	100	100
Expenses						
Personnel	51	51	46	50	44	..
Royalties and purchases of programming	14	20	21	18	16	..
Other expenses	35	29	32	33	40	..
Total	100	100	100	100	100	100

Source: Turku School of Economics, Business research and development centre

Figure 3. 4 Breakdown of local radio stations' revenues and expenses



Source: Table 3.4

3.5 Number of private radio stations 1985 – 1998*

	Local	Semi - national	National	Total	Stations closed down**
1985	18	–	–	18	0
1986	18	–	–	18	3
1987	28	–	–	28	1
1988	40	–	–	40	0
1989	55	–	–	55	2
1990	66	–	–	66	1
1991	60	–	–	60	7
1992	57	–	–	57	5
1993	56	–	–	56	6
1994	57	2	–	59	3
1995	58	2	–	60	3
1996	57	2	–	59	3
1997	58	2	1	61	2
1998	58	2	1	61	1

* *At year-end*

** *Includes voluntary closedowns, banktruptcies and mergers. In most cases a new operator has continued programming.*

3.6 Biggest local radio stations by turnover 1997

	FIM million	Company	Community
Radio 100	12.4	Pro Radio/SBS	Turku
Radio 957	12.3	Tampereen Ääni/SBS	Tampere
Radio City	9.6	Helsingin Paikallinen Radio/SBS	Helsinki
Radio Mega	9.0	Oulun Horisontti/SBS	Oulu
Kiss FM	8.9	Helsingin Radioviestintä/SBS	Helsinki plus 3 other cities
Radio Oikea Asema	7.9	Kuopion Suomalainen Radioasema	Kuopio
Radio Jyväskylä*	7.4	Jyväskylän Seudun Paikallisradio	Jyväskylä
NRJ Helsinki	7.0	Capitec (NRJ 67%)	Helsinki
Rytmiradio*	6.5	Radioaktiivit	Lahti
Radio Pori	6.2	Porin Paikallisradio	Pori
Total	87.2		
All local radio stations	190.0		

* *Data from 1996.*

Source: Markkinointi & Mainonta 14/1998

Figure 3.5 Coverage areas of Radio Nova

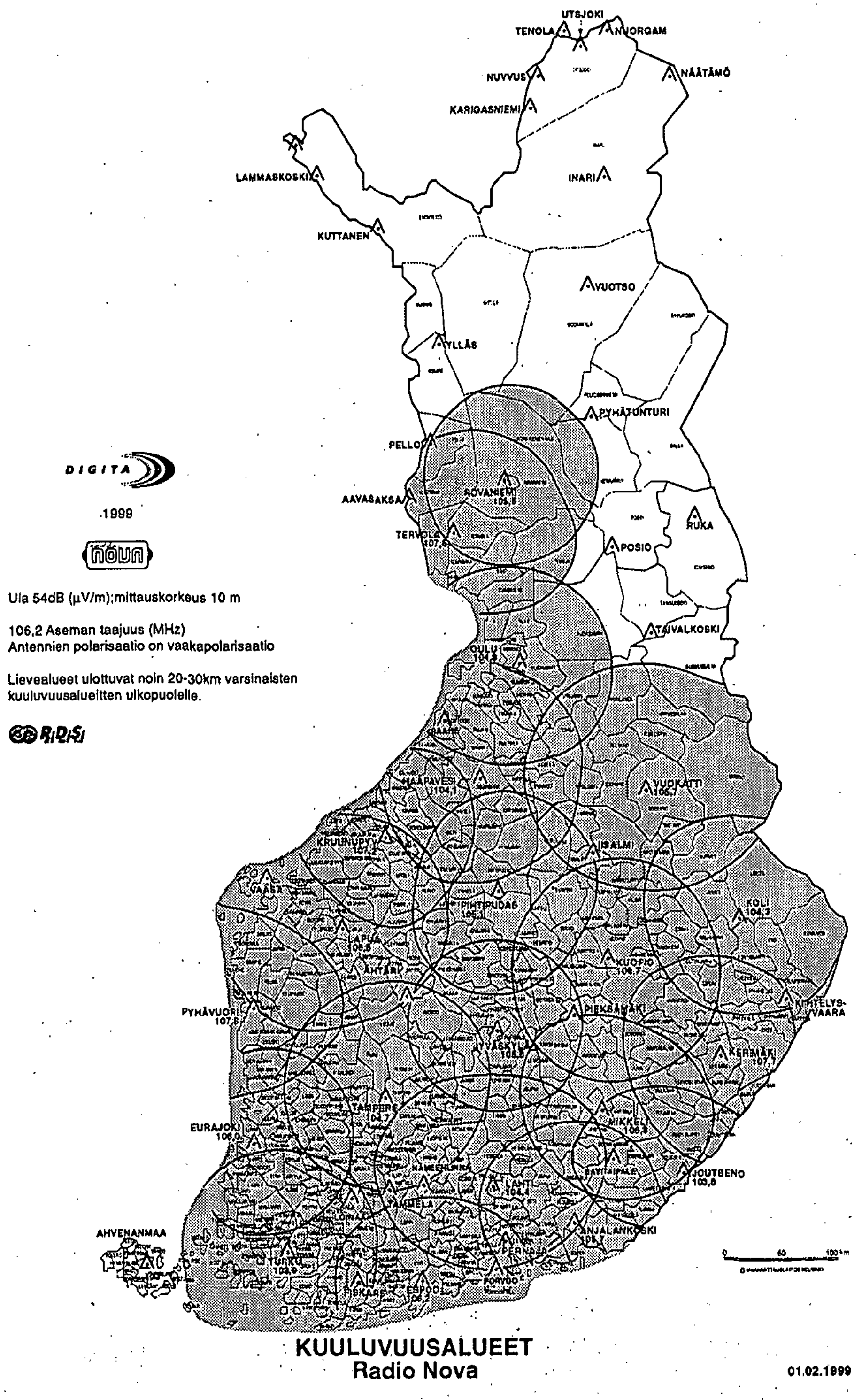
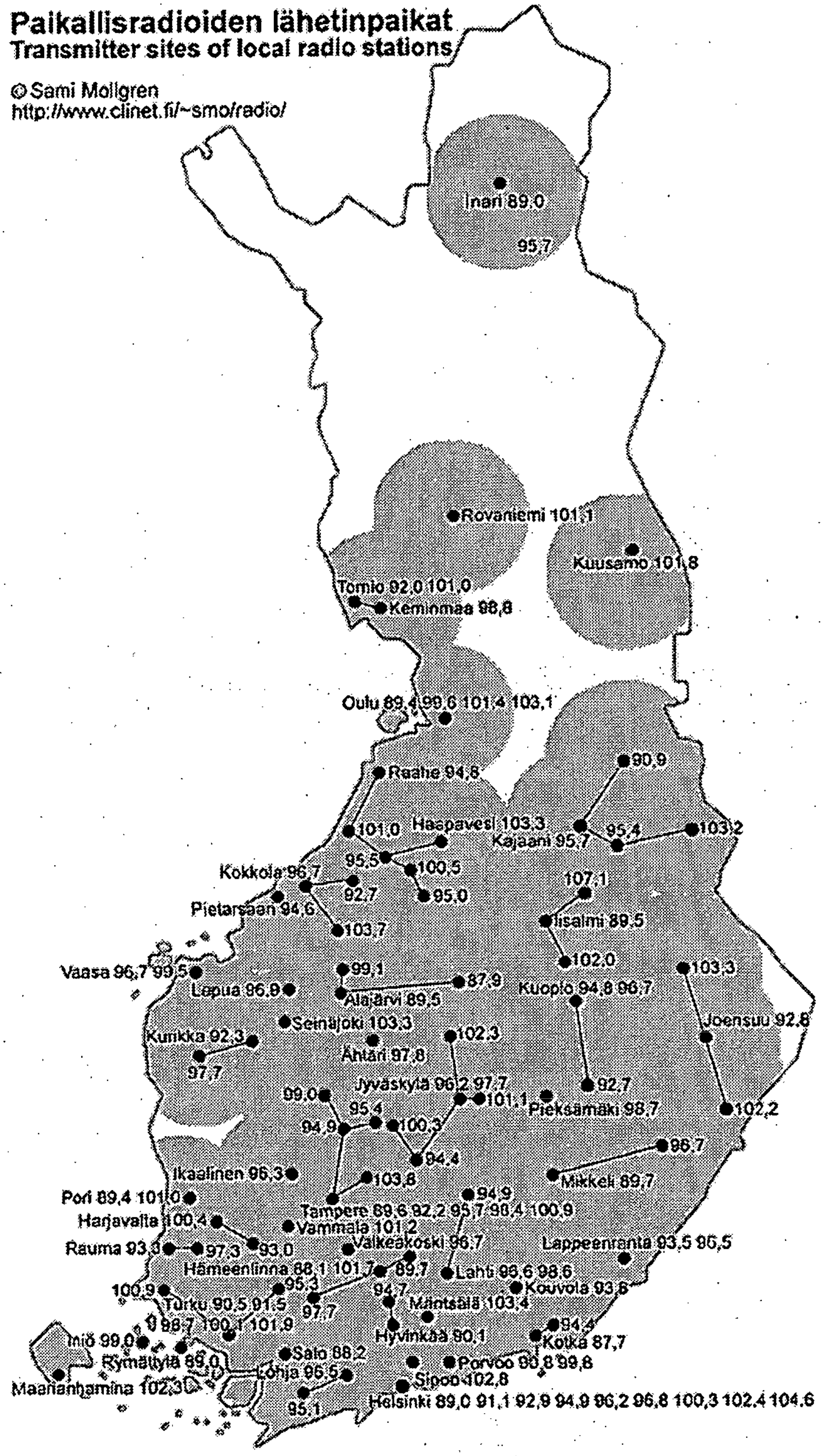


Figure 3.6 Transmitter sites of local radio stations



3.7 Local radio chains in operation, spring 1999

	Stations	Media group	Nationality
Radio Plus	13	Suomen Myllysampo Oy (Suomen Viestintärahoitus 23%; Alma Media 22%)	Finland
Classic FM	10	Classic FM/Great Western Radio (GWR)	Britain
Kiss FM	4	Scandinavian Broadcasting System (SBS)	Luxembourg

Sources: Company reports
Statistics Finland, Media statistics

3.8 YLE radio personnel 1989/90 – 1997

	Employees
1988/89	1 040
1989/90	1 260
1990/91	1 270
1991/92	1 294
1993	1 322
1994	1 349
1995	1 327
1996	1 351
1997	1 390

* *YLE finacial year was 1.6. – 31.5. until the year 1992.*

Source: YLE Personnel administration

3.9 Private radio stations, personnel 1985 – 1997

	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
	Employees												
Permanent staff total	155	167	..	401	560	630	521	513	455	496	494	490	492
Permanent staff average/station	*9*	*10*	..	*10*	*11*	*11*	*10*	*10*	*8*	*8*	*8*	*8*	*8*
Free lance	187	190	..	416	735	800	550	550	443	482	380	360	354
Free lance average/station	*11*	*11*	..	*11*	*14*	*14*	*11*	*11*	*8*	*8*	*6*	*6*	*6*

Sources: Ministry of Communications (– 1988)
Accociation of Finnish Broadcasters (1989 –)

3.10 YLE weekly radio programming hours 1980 – 1997

Year	Nationwide networks				Regional broadcasts				
	Radio 1	Radio 2	Radio 3	Radio 4&5*	In Finnish	In Swedish	In Sami	Capital FM** Helsinki	Foreign service broadcasts
	Hours/week								
1980/81	121	109	–	99	52	17	2		40
1984/85	133	137	–	131	109	26	3		187
1985/86	130	136	–	130	142	42	3		187
1986/87	129	135	–	129	176	50	4		187
1987/88	130	165	–	124	210	58	6		222
1988/89	124	151	–	121	354	57	10		235
1989/90	133	168	–	127	547	58	10		232
1990/91	132	168	130	128	549	76	11		229
1991/92	134	168	137	131	497	137	16	155	219
1993	134	168	136	130	585	132	26	168	248
1994	154	168	136	130	639	130	33	168	247
1995	168	168	135	133	659	132	34	168	372
1996	168	168	135	137	684	143	39	168	639
1997	168	168	133	185	735	99	36	168	..

* *Until November 1997: Radio 4.*
** *Transmits the programming of Voice of America, National Public Radio, Deutsche Welle, Radio France International, BBC World Service and YLE's foreign service programming in the Helsinki region on a 24-hour basis.*

Sourrce: YLE Annual reports and yearbooks

3.11 YLE regional broadcasting 1997

Name	Location	Established	Hours/week	Music %
In Finnish				
Ylen Aikainen	Helsinki	1975	36	47
Radio Länsi-Uusimaa	Tammisaari	1991	11	48
Radio Itä-Uusimaa	Porvoo	1991	19	52
Etelä-Karjalan Radio	Lappeenranta	1989	36	51
Kymenlaakson Radio	Kouvola	1989	36	50
Turun Radio	Turku	1982	36	53
Satakunnan Radio	Pori	1988	36	54
Tampereen Radio	Tampere	1982	36	50
Lahden Radio	Lahti	1984	36	52
Radio Häme	Hämeenlinna	1989	36	50
Radio Keski-Suomi	Jyväskylä	1986	101	56
Radio Savo	Kuopio	1984	36	51
Etelä-Savon Radio	Mikkeli	1985	36	51
Pohjois-Karjalan Radio	Joensuu	1988	36	49
Pohjanmaan Radio	Vaasa	1988	36	51
Radio Keski-Pohjanmaa	Kokkola	1991	36	56
Oulu Radio	Oulu	1983	36	44
Kainuun Radio	Kajaani	1988	35	62
Lapin Radio	Rovaniemi	1988	35	50
Radio Perämeri	Kemi	1991	33	55
Total			735	52
In Swedish				
Österbotten	Vasa	1973	20	38
Åboland	Åbo	1973	21	41
Ekenäs	Ekenäs	1973	20	43
Mellannyland	Helsingfors	1976	21	45
Borgå	Borgå	1973	17	36
Total			99	41
In Sami				
Saamen Radio	Inari	1987	36	..

Source: YLE annual report 1997

3.12 Average weekly broadcasting by private local radio stations 1985 – 1997

	Hours/week
1985	30
1986	39
1987	62
1988	70
1989	94
1990	98
1991	107
1992	123
1993	168
1994	163
1995	168
1996	168
1997	168

Source: Ministry of Communications/ Association of Finnish Broadcasters

3.13 YLE radio nationwide programming 1997

	Broadcasting time	News	Talk	Music
	Hours/day	%		
YLE Radio 1	24	5	32	63
YLE Radio 2	24	2	24	74
YLE Radio 3*	128	10	45	45
YLE Radio 4	19	6	49	45

* *Including regional services.*

Source: Yle annual report 1997

3.14 Daily reach of radio 1980 – 1998

Population aged 9+	1980	1985	1990	1991	1992	1993	1994	1995	1996	1997 (Autumn)	1998 Whole country	Local radio areas (November)
	%											
YLE Radio 1	52	33	20	18	19	15	14	13	13	13	12	11
YLE Radio 2	55	52	20	23	22	22	22	22	18	12	11	10
YLE Radio 3	..	..	37	39	41	44	44	44	42	38	39	38
YLE Radio 4&5	1	1	2	3	3	2	3	2	2	2	2	1
YLE total	76	68	63	68	68	67	68	67	62	55	54	52
Radio Nova										20	20	18
Private local radio stations	–	..	41	35	33	40	38	39	39	32	30	33
Total	76	..	83	82	83	85	85	85	82	82	81	79

YLE Radio 1: As from 1990 Yle Radio 1.
YLE Radio 2: As from 1990 Radiomafia
YLE Radio 3: As from 1990 Radio Suomi.
YLE Radio 4&5 : Full-service networks for the Swedish-speaking audience. (Until November 1997: Radio 4 only.)

Data for late autumn. Since 1992 data for winter season. 1997 data for September to December.

Sources: Finnpanel Oy, YLE, Research and Development, Accociation of Finnish Broadcasters National radio surveys 1991 –.

3.15 Daily reach of radio by population groups 1998

Population aged 9+	YLE Radio 1	YLE Radio 2	YLE Radio 3	YLE Radio 4&5	YLE total	Radio Nova	Private local radio	All radio
	%							
All	12	11	39	2	54	20	30	81
Sex								
Women	14	9	37	2	53	18	29	80
Men	10	14	40	2	56	22	31	82
Age								
9 – 14	5	14	9	1	26	22	32	63
15 – 24	4	25	11	2	36	34	31	75
25 – 34	3	16	18	2	34	33	36	76
35 – 44	7	11	36	1	49	26	37	81
45 – 54	14	7	54	2	66	15	31	86
55 – 64	20	5	67	3	80	6	22	89
65 –	30	4	64	2	81	3	17	87
Education								
Primary	20	5	65	1	77	7	23	88
Comprehensive	8	15	27	2	44	23	31	75
Vocational	10	12	40	2	55	25	33	84
College or more	11	12	32	2	49	23	32	80
Academic	16	9	35	4	54	17	27	77
Occupation								
Industrial blue-collar	7	12	41	1	53	26	36	85
White collar	11	10	36	2	51	23	33	80
Managerial	16	8	44	2	59	21	30	82
Farmer/Other self-employed	11	11	48	2	61	25	30	85
Pensioner	28	4	66	2	82	3	18	89
Schoolboy/girl	4	15	9	1	27	24	31	63
Student	4	24	10	2	36	31	32	74

Source: Finnpanel Oy
YLE

3.16 Average daily radio listening time 1980 – 1998

Population aged 9+	1980	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997 (Autumn)	1998 Whole country	1998 Local radio areas (November)
Min/day																
YLE Radio 1	64	29	35	34	34	29	23	23	27	19	18	16	16	17	16	15
YLE Radio 2	64	83	96	114	97	78	24	31	31	29	31	29	24	16	13	10
YLE Radio 3	..	6	6	9	13	23	80	87	105	102	103	103	95	87	89	93
YLE Radio 4&5	1	1	1	1	1	1	2	3	4	3	4	3	3	2	3	2
YLE total	128	119	138	158	146	131	129	144	167	152	155	152	137	122	121	121
Radio Nova														32	30	27
Private local radio stations	–	..	6	16	26	44	69	62	62	71	68	68	68	52	48	50
Total	128	..	145	174	172	175	199	206	230	223	223	219	205	205	199	197

YLE Radio 1: As from 1990 Yle Radio 1.
YLE Radio 2: As from 1990 Radiomafia
YLE Radio 3: As from 1990 Radio Suomi.
YLE Radio 4&5: Full-service networks for the Swedish-speaking audience. (Until November 1997: Radio 4 only.)

Data for late autumn. Since 1992 data for winter season. 1997 data for September to December.

Sources: Finnpanel Oy, YLE, Research and Development, Accociation of Finnish Broadcasters National radio surveys 1991 –.

3.17 Average daily radio listening time by population groups 1998

Population aged 9+	YLE Radio 1	YLE Radio 2	YLE Radio 3	YLE Radio 4&5	YLE total	Radio Nova	Private local radio	All radio
	Min/day							
All	16	13	89	3	121	30	48	199
Sex								
Women	20	10	92	3	125	28	47	200
Men	12	17	86	2	117	32	48	197
Age								
9 – 14	2	9	6	1	19	17	29	65
15 – 24	3	28	14	2	46	44	39	130
25 – 34	3	22	30	2	57	57	64	177
35 – 44	8	15	68	1	92	43	64	200
45 – 54	18	9	124	3	154	26	58	238
55 – 64	26	5	174	7	212	9	36	257
65 –	47	4	177	4	233	3	29	264
Education								
Primary	30	7	183	3	222	10	42	275
Comprehensive	8	16	55	2	81	31	47	159
Vocational	14	17	95	2	129	45	60	234
College or more	15	15	60	4	94	36	51	180
Academic	20	9	56	4	89	21	34	143
Occupation								
Industrial blue-collar	9	19	93	2	123	48	71	242
White collar	13	12	66	3	94	35	53	182
Managerial	17	10	79	2	109	32	42	182
Farmer/Other self-employed	14	16	120	3	153	49	60	262
Pensioner	43	5	180	4	232	4	31	267
Schoolboy/girl	2	12	6	1	21	21	29	70
Student	3	25	11	2	41	34	38	113

Source: Finnpanel Oy
YLE

3.18 Radio channel shares 1980 – 1998

Population aged 9+ %	1980	1985	1990	1991	1992	1993	1994	1995	1996	1997 (Autumn)	1998 Whole country	Local radio areas (November)
YLE Radio 1	50	24	12	11	12	9	8	7	8	8	8	8
YLE Radio 2	50	70	12	15	13	13	14	13	12	8	7	5
YLE Radio 3	..	5	40	42	46	46	46	47	46	42	45	47
YLE Radio 4&5	1	1	1	1	2	1	2	1	1	1	2	1
YLE total	100	100	65	70	73	68	70	69	67	60	62	61
Radio Nova										16	15	14
Private local radio stations	–	..	35	30	27	32	30	31	33	25	24	25
Total	100	..	100	100	100	100	100	100	100	100	100	100
Average listenig time, min/day	128	..	199	206	230	223	223	219	205	205	199	197

YLE Radio 1: As from 1990 Yle Radio 1.
YLE Radio 2: As from 1990 Radiomafia
YLE Radio 3: As from 1990 Radio Suomi.
YLE Radio 4&5: Full-service networks for the Swedish-speaking audience. (Until November 1997: Radio4 only.)

Data for late autumn. Since 1992 data for winter season. 1997 data for September to December.

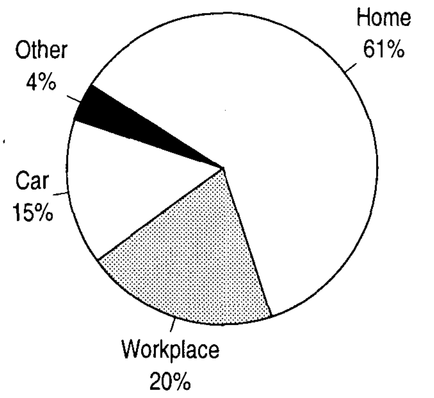
Sources: Finnpanel Oy, YLE, Research and Development, Accociation of Finnish Broadcasters National radio surveys 1991 –.

3.19 Radio channel shares by population groups 1998

Population aged 9+	YLE Radio 1	YLE Radio 2	YLE Radio 3	YLE Radio 4&5	Radio Nova	Private local radio	All radio
	%						
All	8	7	45	2	15	24	100
Sex							
Women	10	5	46	2	14	24	100
Men	6	9	44	1	16	24	100
Age							
9 – 14	3	14	9	2	26	45	100
15 – 24	2	22	11	2	34	30	100
25 – 34	2	12	17	1	32	36	100
35 – 44	4	8	34	1	22	32	100
45 – 54	8	4	52	1	11	24	100
55 – 64	10	2	68	3	4	14	100
65 –	18	2	67	2	1	11	100
Education							
Primary	11	3	67	1	4	15	100
Comprehensive	5	10	35	1	19	30	100
Vocational	6	7	41	1	19	26	100
College or more	8	8	33	2	20	28	100
Academic	14	6	39	3	15	24	100
Occupation							
Industrial blue-collar	4	8	38	1	20	29	100
White collar	7	7	36	2	19	29	100
Managerial	9	5	43	1	18	23	100
Farmer/Other self-employed	5	6	46	1	19	23	100
Pensioner	16	2	67	1	1	12	100
Schoolboy/girl	3	17	9	1	30	41	100
Student	3	22	10	2	30	34	100

Source: Finnpanel Oy
YLE

Figure 3.7 Breakdown of local radio listening by place of listening 1998



Source: Finnpanel Oy

3.20 Retail sales of radio equipment 1980 – 1997

	1980	1985	1990	1991	1992	1993	1994	1995	1996	1997	Change 1997/96
	1 000 units										%
Hi-fi equipment											
Tuners	14	40	15	8	5	3	1	1	1	1	0.0
Amplifiers	15	42	20	13	10	6	3	3	4	3	–25.0
Receivers	31	23	16	16	11	8	10	16	18	22	22.2
Music centres	48	50	74	65	57	50	65	84	97	98	1.0
Hi-fi equipment total	108	155	125	102	83	65	79	104	120	124	3.3
Radio sets											
Radio cassette recorders with CD-player						36	70	96	115	120	4.3
Other radio cassette recorders	155	280	260	212	147	95	96	76	71	57	–19.7
Portable radios	35	50	75	60	45	30	27	34	30	34	13.3
Home & clock radios	70	40	80	85	75	60	60	50	53	75	41.5
Radio sets total	260	370	415	357	267	221	253	256	269	286	6.3
Car radios & stereos total	130	170	200	136	105	86	94	125	160	172	7.5

* *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.

Processed

3.21 Radio equipment: average prices and sales volume 1980 – 1997*

		1980	1985	1990	1991	1992	1993
Hi-fi equipment:							
Tuners	Average price FIM	950	700	825	950	950	900
	Sales volume FIM million	13	28	12	8	5	3
Amplifiers	Average price FIM	1 100	850	1 300	1 300	1 350	1 600
	Sales volume FIM million	17	36	26	17	14	10
Receivers	Average price FIM	1 300	1 100	1 600	1 650	1 550	2 050
	Sales volume FIM million	40	25	26	26	17	16
Music centres	Average price FIM	2 400	2 200	2 200	2 200	2 600	2 900
	Sales volume FIM million	115	110	163	143	148	148
Hi-fi equipment total	Sales volume FIM million	185	199	227	194	184	177
Radio sets:							
Radiocassette recorders with CD-player	Average price FIM						1 100
	Sales volume FIM million						40
Other radio cassette recorders	Average price FIM	670	730	530	530	480	350
	Sales volume FIM million	104	204	138	112	71	32
Portable radios	Average price FIM	310	260	215	220	240	220
	Sales volume FIM million	11	13	16	13	11	7
Home & clock radios	Average price FIM	300	260	180	170	160	170
	Sales volume FIM million	21	10	14	14	12	10
Radio sets total	Sales volume FIM million	136	227	168	139	94	89
Car radios & stereos total	Average price FIM	900	1 275	1 400	1 400	1 500	1 500
	Sales volume FIM million	117	217	280	190	158	129

* *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.

3.21 Continued

		1994	1995	1996	1997	Change 1997/96
Hi-fi equipment:						
Tuners	Average price FIM	900	900	900	900	0.0
	Sales volume FIM million	1	1	1	1	0.0
Amplifiers	Average price FIM	1 700	1 500	1 650	1 500	–9.1
	Sales volume FIM million	5	5	7	5	–28.6
Receivers	Average price FIM	2 050	1 900	2 000	2 000	0.0
	Sales volume FIM million	20	30	35	44	25.7
Music centres	Average price FIM	2 700	2 350	2 300	2 000	–13.0
	Sales volume FIM million	174	197	223	196	–12.1
Hi-fi equipment total	Sales volume FIM million	200	233	266	246	
Radio sets:						
Radiocassette recorders	Average price FIM	950	900	800	700	–12.5
with CD-player	Sales volume FIM million	66	86	92	84	–8.7
Other radio cassette recorders	Average price FIM	325	530	490	490	0.0
	Sales volume FIM million	30	22	20	15	–25.0
Portable radios	Average price FIM	230	220	220	220	0.0
	Sales volume FIM million	6	7	7	7	0.0
Home & clock radios	Average price FIM	170	150	150	150	0.0
	Sales volume FIM million	10	8	8	11	37.5
Radio sets total	Sales volume FIM million	112	123	127	117	–7.9
Car radios & stereos total	Average price FIM	1 550	5 050	4 650	4 350	–6.5
	Sales volume FIM million	146	182	221	228	3.2

3.22 Number and location of radio sets in households 1995 – 1998

	1995	1996	1997	1998
	%			
Number of radio sets				
No radio sets	2	3	1	1
1	19	18	15	13
2	20	19	18	20
3	18	18	20	20
4	15	15	16	17
5	10	12	11	11
6+	15	16	18	16
Location				
Living room	64	63	70	67
Kitchen	54	50	49	50
Bedroom	56	52	57	56
Children´s rooms	22	23	24	26
Study	13	12	17	15
Other room	21	18	26	24
Car radio	..	52	61	57

Source: Finnpanel Oy

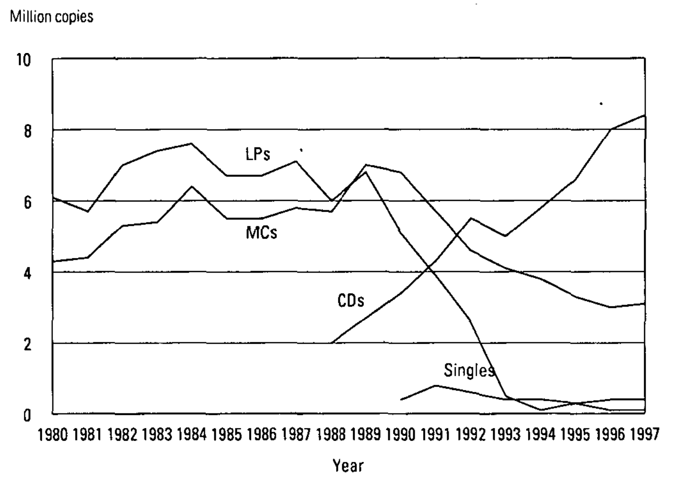
Note.
All radio sets including car radios, clock radios and headphone radios.

4 Phonograms

The Finnish phonogram markets have been picking up during the past couple of years. In value terms, sales are now at a higher level than they were in the pre-recession years in the early 1990s. However, the numbers of copies sold are still at a much lower level than around the turn of the decade.

Following a long period of relatively steady growth, the Finnish phonogram markets took a downward turn in the early 1990s. During the 1980s annual sales of phonograms had increased from around 10 million to 16.5 million phonograms (an estimate based on adding imports to domestic production). Sales then declined very sharply, dropping to around 10 million phonograms in 1993–94 (Table 1). In 1998 a total of about 12 million phonograms were sold in Finland. This translates into 2.3 phonograms per capita, which is clearly less than the corresponding figures in Norway and Denmark (around 3.5) and slightly less than in Sweden (2.9). (Table 14 in Chapter 12.)

Figure 4.1 Phonogram sales 1980 – 1997



Source: Table 4.1

The phonogram markets have long been dominated by CDs. In 1998 CD sales totalled 11 million copies; the figures for cassettes were 1.3 million. As for CD players, compared to other Scandinavian countries consumers were initially quite slow to pick them up. According to Finnpanel's household equipment survey, 60 per cent of Finnish households had a CD player in 1998. Yet the rate of penetration still remains lower than in the other Scandinavian countries, where by 1997 up to 70–80 per cent of households had a CD player. In Finland the rate of penetration began to increase more clearly with the arrival of the cheaper version of the CD player, i.e. the radiocassette recorder with CD-player, which still is more common than the separate CD player. (Tables 10–12.)

Measured in numbers of phonograms sold, the Finnish phonogram markets have long been more or less evenly divided between domestic and foreign products. In value terms, however, imported phonograms sell more than Finnish phonograms. This is explained by the dominant market share of CDs in the sale of foreign phonograms. Until recently, C-cassettes have continued to account for a large proportion of domestic phonogram sales. (Tables 3–5.)

Another indication of the strong role of domestic phonograms is that on the list of all-time long-play bestsellers, there are 31 Finnish as compared to only six foreign phonograms that have sold over 100 000 copies. (Cf. table 9.)

Vinyl records have all but disappeared from the mass markets and turned into a niche market for afficionados. The C-cassette has been more successful in retaining its position, particularly in the market for domestic phonograms. However, Mini Disc is now emerging as a serious rival to the C-cassette for recording uses in the home: in the longer term this format certainly has the potential to take over from the C-cassette as an everyday recording medium.

In 1997 a total of almost 3000 domestic phonogram titles were published in Finland. However, it is important to note that a considerable part of cassette production consists of other than music titles. The biggest single non-music category was represented by spiritual material, followed by language cassettes. The total number of phonogram titles published each year is also pushed up by reproductions of old recordings and the publication of the same recording in different formats (e.g. in CD and cassette). (Table 2.)

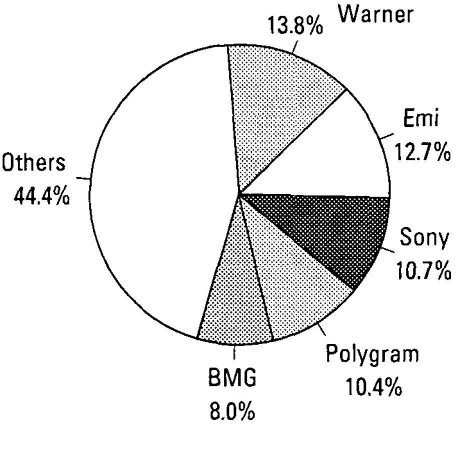
The process of vertical international integration of the Finnish phonogram business was completed in the early 1990s. Warner Music started up in Finland in 1989. In 1991 Polygram took over Scandinavia's biggest record company Sonet complete with its subsidiaries (including Sonet Finland), and the following year founded its own subsidiary in Finland. BMG set up a Finnish subsidiary in 1991. BMG was also MCA Universal's distributor in Finland until 1998, when the Universal Music Group established its own office in Finland. The big multinational companies Sony and EMI started subsidiaries in Finland much earlier in the 1970s. In 1997 the five biggest multinational players together accounted for 56 per cent of total phonogram sales in Finland. (Figure 2.)

In 1993 one of the most traditional companies in the business Fazer Musiikki was taken over by Warner Music Finland. Fazer has an impressive backlist of music by Finnish artists.

The major labels are very much in control of imports and domestic production. However, ever since the 1970s and 1980s there has been growing up a network of small independent producers, the number of which has apparently continued to increase. According to Statistics Finland's Business Register, there were a total of 129 record companies and recording studios in Finland in 1984. In 1996 the number of phonogram publishers was 249.

Listening to phonograms has tended to decline in recent years: less than one-fifth of the Finnish people now listen on a daily basis to phonograms, whether purchased or borrowed. In 1990, the corresponding proportion was still around one-quarter. The average listening time is around 20 minutes a day. Youths and young adults are particularly active in this respect, though on the other hand it is precisely in these age groups that listening has declined most (Tables 6 & 7). At least part of the reason for the declining use of phonograms lies no doubt in the fact that many radio stations are now playing music virtually non-stop.

Figure 4.2 Market shares of phonogram sales 1997



Market shares based on estimated total market at distributor level.
Source: Finnish Group of IFPI & Statistics Finland

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.

The Finnish Group of IFPI also compiles statistics on the annual sales of its member companies, 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 around 80 per cent of the estimated total value of phonogram sales and for 70 per cent of the copies sold.

Data from the monthly national radio surveys conducted by Finnpanel, a market research institute specializing in the measurement of radio listening and television viewing, also include information on daily reach of phonograms and the amount of time spent listening to phonograms.

From 1987 to 1992 annual statistics published by the Ministry of Education on public libraries included information on libraries' recording collections and lendings. However, since 1993 the data covered by these statistics have been significantly reduced.

Tuomo Sauri

Figures

Tables

4.1 Phonogram sales 1980 – 1998

	Single	LP	MC	CD	Total	Sales value Current prices	Fixed (1997) prices
	Million copies					FIM million	
1980	..	6.1	4.3	..	10.4	252	555
1985	..	6.7	5.5	..	12.2	404	591
1986	..	6.7	5.5	..	12.2	368	520
1987	..	7.1	5.8	..	12.9	417	569
1988	..	6.0	5.7	2.0	13.7	462	601
1989	..	6.8	7.0	2.7	16.5	558	680
1990	0.4	5.1	6.8	3.4	15.7	666	766
1991	0.8	3.9	5.7	4.3	14.7	650	718
1992	0.6	2.6	4.6	5.5	13.3	580	625
1993	0.4	0.5	4.1	5.0	10.0	530	559
1994	0.4	0.1	3.8	5.8	10.1	585	610
1995	0.3	0.3	3.3	6.6	10.5	630	650
1996	0.4	0.1	3.0	8.0	11.5	675	693
1997	0.4	0.1	2.1	9.9	12.0	725	735
1998	..	0.0	1.3	11.0	12.3	750	750

Sales at retail level. The figures are estimates.
Until 1990 singles are included in the LP, MC or CD category according to type of recording.

Source: Finnish group of IFPI

4.2 Production of phonogram titles in Finland 1985 – 1997

Year	Singles		LPs		CDs		MCs		Of which MCs containing music		Audio books		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1985	380	20	489	26	–	–	981	52	..	..	22	1	1 872	100
1986	390	18	571	27	9	0	1 123	53	..	..	36	2	2 129	100
1987	405	21	516	27	23	1	924	47	..	..	78	4	1 946	100
1988	406	22	457	24	123	7	706	38	..	..	190	10	1 882	100
1989	579	25	502	21	279	12	922	39	..	..	70	3	2 352	100
1990	710	24	514	17	281	9	1 349	45	..	..	140	5	2 994	100
1991	782	25	521	17	240	8	1 400	45	..	..	136	4	3 079	100
1992	801	23	377	11	501	14	1 651	48	..	..	143	4	3 473	100
1993	466	17	152	6	818	31	1 102	41	666	60	126	5	2 664	100
1994	205	9	55	2	744	32	1 233	53	699	57	109	5	2 346	100
1995	90	3	16	1	1 311	48	1 253	45	729	58	89	3	2 759	100
1996	18	1	2	0	1 418	43	1 747	53	715	41	110	3	3 295	100
1997	10	0	5	0	1 749	62	1 044	37	631	60	..	..	2 808	100

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. CD-singles are included in CDs.

Source: University libraries of Jyväskylä and Helsinki

4.3 Phonogram sales by genre 1994 – 1997

	Million copies						
	Domestic pop	%	International pop	%	Classical	%	Total
1994	4.8	50	4.2	44	0.6	6	9.6
1995	4.5	45	4.9	48	0.7	7	10.2
1996	4.8	42	5.6	49	1.0	9	11.4
1997	4.9	41	6.1	51	1.0	8	12.0
	FIM million *						
	Domestic pop	%	International pop	%	Classical	%	Total
1994	136	39	183	52	34	10	353
1995	145	37	209	54	35	9	389
1996	170	41	207	49	42	10	419
1997	180	40	231	51	40	9	451

* *Estimated total sales at distributor level. Singles are not included.*

Source: Finnish group of IFPI

4.4 Phonogram sales by type of recording and by origin 1980 - 1997

Year	LPs & singles			MCs			CDs			All phonograms		
	Finnish	Foreign	Total	Finnish	Foreign	Total	Finnish	Foreign	Total	Total	Of which Finnish	Foreign
	'000 copies											
1980	1 158	1 647	2 805	1 424	627	2 051	–	–	–	4 856	2 582	2 274
1981	1 485	1 769	3 254	1 672	692	2 364	–	–	–	5 618	3 157	2 461
1982	1 472	1 724	3 196	1 812	558	2 370	–	–	–	5 566	3 284	2 282
1983	1 223	1 898	3 121	1 827	659	2 486	–	–	–	5 607	3 050	2 557
1984	1 328	1 807	3 135	2 641	644	3 285	–	–	–	6 420	3 969	2 451
1985	1 430	2 144	3 574	2 365	694	3 059	–	–	–	6 633	3 795	2 838
1986	1 177	2 300	3 477	1 764	799	2 563	–	–	–	6 040	2 941	3 099
1987	1 220	2 072	3 292	1 767	822	2 589	34	215	249	6 130	3 021	3 102
1988	1 333	2 002	3 335	1 631	832	2 463	125	555	680	6 478	3 089	3 389
1989	1 066	2 090	3 156	1 825	1 113	2 938	248	901	1 149	7 243	3 139	4 104
1990	1 206	1 846	3 052	2 267	1 341	3 608	525	1 273	1 798	8 458	3 998	4 460
1991	1 001	1 351	2 352	2 046	1 285	3 331	796	1 842	2 638	8 321	3 843	4 478
1992	789	743	1 532	1 801	878	2 680	970	1 974	2 945	7 156	3 560	3 596
1993	264	288	552	1 846	814	2 660	1 080	2 127	3 207	6 420	3 191	3 229
1994	121	192	312	1 687	707	2 394	1 389	2 271	3 661	6 367	3 196	3 170
1995	79	142	221	1 684	749	2 433	1 920	2 921	4 841	7 495	3 682	3 813
1996	73	174	247	1 539	403	1 942	2 429	3 156	5 585	7 773	4 040	3 732
1997	80	241	321	1 154	314	1 462	2 844	4 136	6 980	8 763	4 078	4 691
	%											
1980	23.9	33.9	57.8	29.3	12.9	42.2	–	–	0.0	100.0	53.2	46.8
1981	26.4	31.5	57.9	29.8	12.3	42.1	–	–	0.0	100.0	56.2	43.8
1982	26.5	30.9	57.4	32.6	10.0	42.6	–	–	0.0	100.0	59.0	41.0
1983	21.8	33.9	55.7	32.6	11.8	44.3	–	–	0.0	100.0	54.4	45.6
1984	20.7	28.2	48.8	41.1	10.0	51.2	–	–	0.0	100.0	61.8	38.2
1985	21.6	32.3	53.9	35.7	10.5	46.1	–	–	0.0	100.0	57.2	42.8
1986	19.5	38.1	57.6	29.2	13.2	42.4	–	–	0.0	100.0	48.7	51.3
1987	19.9	33.8	53.7	28.8	13.4	42.2	0.6	3.5	4.1	100.0	49.3	50.6
1988	20.6	30.9	51.5	25.2	12.8	38.0	1.9	8.6	10.5	100.0	47.7	52.3
1989	14.7	28.9	43.6	25.2	15.4	40.6	3.4	12.4	15.9	100.0	43.3	56.7
1990	14.3	21.8	36.1	26.8	15.9	42.7	6.2	15.1	21.3	100.0	47.3	52.7
1991	12.0	16.2	28.3	24.6	15.4	40.0	9.6	22.1	31.7	100.0	46.2	53.8
1992	9.9	9.1	21.4	25.2	12.3	37.5	13.6	27.6	41.2	100.0	49.7	50.3
1993	4.1	4.5	8.6	28.8	12.7	41.4	16.8	33.1	50.0	100.0	49.7	50.3
1994	1.9	3.0	4.9	26.5	11.1	37.6	21.8	35.7	57.5	100.0	50.2	49.8
1995	1.1	1.9	2.9	22.5	10.0	32.5	25.6	39.0	64.6	100.0	49.1	50.9
1996	0.9	2.2	3.2	19.8	5.2	25.0	31.2	40.6	71.9	100.0	52.0	48.0
1997	0.9	2.8	3.7	13.2	3.6	16.7	32.5	47.2	79.7	100.0	46.5	53.5

Sales at distributor level. Data cover the sales by Finnish Group of IFPI members only. In 1997 the share of unit sales by Finnish IFPI was 73 % at distributor level.

Source: Finnish Group of IFPI

4.5 Value of phonogram sales by type of recording and by origin 1990 – 1997

Year	LPs & singles			MCs			CDs			All phonograms		
	Finnish	Foreign	Total	Finnish	Foreign	Total	Finnish	Foreign	Total	Total	Of which Finnish	Foreign
	FIM million											
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
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
1992	19.5	18.7	38.1	46.2	28.2	74.4	41.3	92.8	134.1	246.6	106.9	139.7
1993	4.6	6.9	11.5	44.3	28.7	73.0	46.2	108.2	154.4	238.9	95.1	143.7
1994	1.9	4.3	6.2	42.4	25.0	67.4	60.9	117.3	178.2	251.9	105.3	146.6
1995	1.3	3.2	4.5	42.9	27.2	70.1	80.5	152.1	232.6	307.3	124.7	182.5
1996	1.2	3.8	5.0	41.2	13.6	54.8	107.2	160.8	268.0	327.8	149.6	178.2
1997	1.2	5.4	6.6	30.0	10.3	40.4	115.0	206.4	321.4	368.4	146.2	222.1
	%											
1990	12.3	19.3	31.6	21.6	14.5	36.1	8.7	23.6	32.3	100.0	42.6	57.4
1991	9.7	13.0	22.7	20.2	13.2	33.5	12.7	31.2	43.9	100.0	42.6	57.4
1992	7.9	7.6	15.5	18.7	11.4	30.2	16.7	37.6	54.4	100.0	43.3	56.7
1993	1.9	2.9	4.8	18.5	12.0	30.6	19.3	45.3	64.6	100.0	39.8	60.2
1994	0.8	1.7	2.5	16.8	9.9	26.8	24.2	46.6	70.7	100.0	41.8	58.2
1995	0.4	1.0	1.5	14.0	8.9	22.8	26.2	49.5	75.7	100.0	40.6	59.4
1996	0.4	1.2	1.5	12.6	4.1	16.7	32.7	49.1	81.8	100.0	45.6	54.4
1997	0.3	1.5	1.8	8.1	2.8	11.0	31.2	56.0	87.2	100.0	39.7	60.3

Sales at distributor level. Wholesale value of sales by Finnish Group of IFPI members only.
In 1997 the share of sales volume by Finnish IFPI was 82 % at distributor level.

Source: Finnish Group of IFPI

4.6 Average daily reach of phonograms 1990 – 1998

	1990 %	1991	1992	1993	1994	1995	1996	1997	1998
All	24	24	23	19	19	18	17	17	17
Sex									
Women	24	23	24	19	18	18	18	18	17
Men	23	26	23	19	20	18	17	17	16
Age									
9 – 14	44	52	39	36	37	38	34	34	37
15 – 24	58	54	57	46	47	46	41	42	41
25 – 34	29	30	27	23	21	20	19	19	18
35 – 44	13	18	17	14	14	15	14	14	13
45 – 54	..	13	14	9	9	9	9	9	9
55 – 64	..	9	10	7	6	7	7	6	6
65 –	..	4	3	5	5	4	5	5	6
Education									
Primary	7	13	13	10	11	10	10	7	6
Secondary	28	35	29	33	34	31	29	27	28
Vocational	..	..	..	17	16	15	14	14	13
College or more	31	27	26	20	16	19	19	19	17
Academic	..	..	..	..	..	..	16	14	13

The data are based on national radio listening studies. Population aged 9+.

Sources: YLE Research and Development.
Finnpanel Oy

4.7 Average listening time of phonograms 1990 – 1998

	1990 min.	1991	1992	1993	1994	1995	1996	1997	1998
All	23	28	28	22	21	20	19	19	18
Sex									
Women	24	27	27	22	20	20	19	19	18
Men	23	28	28	22	22	20	18	19	18
Age									
9 – 14	35	63	39	40	35	35	30	31	37
15 – 24	70	72	81	68	63	63	54	57	53
25 – 34	26	32	24	23	23	20	20	21	19
35 – 44	10	16	22	13	14	14	14	13	12
45 – 54	..	11	17	9	8	8	9	9	8
55 – 64	..	10	10	6	5	6	6	5	5
65 –	..	3	4	5	4	3	4	4	5
Education									
Primary	5	12	11	9	10	9	9	7	7
Secondary	31	44	37	44	41	40	34	32	32
Vocational	..	..	..	20	17	16	15	15	14
College or more	29	29	30	21	21	20	21	21	18
Academic	..	..	..	..	..	..	15	15	12

The data are based on national radio listening studies. Population aged 9+.

Sources: YLE Research and Development.
Finnpanel Oy

4.8 Top 10 domestic and imported records 1997

Performer	Name	Sales, '000 copies	Publisher
Domestic			
Jari Sillanpää	Auringonnousu	128	MTV-Musiikki
Smurffit	Tanssihitit Vol.3	80	EMI
Smurffit	Tanssihitit Vol.2	69	EMI
Jari Sillanpää	Jari Sillanpää	67	MTV-Musiikki
Kaija Koo	Unihiekkamyrsky	48	WEA
Leevi & The Leavings	Keskiviikko - 40 ensimmäistä	45	Johanna
Don Huonot	Hyvää yötä ja huomenta	38	BMG
Eppu Normaali	Repullinen hittejä	37	Poko
Juice Leskinen	Kautta aikojen -kokoelma	36	Johanna
Tapani Kansa	Juhlalevy	33	Sony
Imported			
Alexia	Fan Club	84	Sony
Princessa	Calling You	70	WEA
Aqua	Aquarium	64	BMG
Spice Girls	Spice World	62	EMI
Various arstists	Hittibuumi 9	47	PolyGram
No Doubt	Tragic Kingdom	47	BMG
Metallica	Reload	43	PolyGram
X-Perience	Magic Fields	42	WEA
Daze	Super Heroes	41	Sony
Prodigy	The Fat Of The Land	40	SMD

Source: Finnish Group of IFPI.

4.9 All time top 10 domestic and imported records

Performer	Name	Sales, '000 copies	Year of publication	Publisher
Domestic				
Jari Sillanpää	Jari Sillanpää	218	1996	MTV Musiikki
Kirka	Surun pyyhit silmistäni	201	1988	Flamingo
Dingo	Kerjäläisten valtakunta	188	1985	Finnlevy
Joel Hallikainen	Joel Hallikainen	179	1992	Finnlevy
Kaija Koo	Tuulten viemää	169	1993	WEA
Smurffit	Tanssihitit Vol.1	164	1996	EMI
Tapio Rautavaara	Reissumiehen taival	150	1979	Finnlevy
Various artists	Finnhits 2	150	1983	Finnlevy
Eppu Normaali	Repullinen hittejä	148	1996	Poko
Hurriganes	Roadrunner	147	1974	Love
Imported				
Queen	Greatest Hits 2	123	1991	EMI
Baccara	Baccara	115	1977	Discophon
Bon Jovi	Cross Roads - The Best Of	110	1994	PolyGram
Bruce Springsteen	Born In The USA	101	1984	Sony
Dire Straits	Brothers In Arms	100	1985	PolyGram
Roxette	Joyride	99	1991	EMI
Madonna	Something To Remember	88	1995	Warner
Michael Jackson	Thriller	86	1983	Sony
Dire Straits	On Every Street	85	1991	PolyGram
Alexia	Fan Club	84	1997	Sony

Source: Finnish Group of IFPI.

4.10 Retail sales of audio equipment 1980 – 1997

	1980	1985	1990	1991	1992	1993	1994	1995	1996	1997	Change 1997/96
	1 000 units										%
Players											
Turntables	41	65	22	13	7	6	9	4	4	5	25.0
CD players	–	8	85	85	70	40	29	32	33	31	–6.1
Radio cassette recorders with CD-player						36	70	96	115	120	4.3
MD players	–	–	–	–	–	–	–	–	–	6	..
Other radio cassette recorders	155	280	260	212	147	95	96	76	71	57	–19.7
Open-reel tape recorders	1	–	–	–	–	–	–	–	–	–	–
Tape decks	47	70	28	22	13	8	6	8	7	5	–28.6
Cassette recorders, Walkmans etc.	15	200	170	145	135	115	132	125	130	100	–23.1
Players total	259	623	565	477	372	300	342	341	360	324	–10.0
Hi-fi equipment											
Tuners	14	40	15	8	5	3	1	1	1	1	0.0
Amplifiers	15	42	20	13	10	6	3	3	4	3	–25.0
Receivers	31	23	16	16	11	8	10	16	18	22	22.2
Loudspeakers	–	–	–	–	–	–	–	41	54	66	22.2
Headphones	–	–	–	–	–	–	–	108	147	140	–4.8
Stereo sets	48	50	74	65	57	50	65	84	97	98	1.0
Hi-fi equipment total	108	155	125	102	83	67	79	253	321	330	2.8

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.

4.11 Audio equipment: average prices and sales volume 1980 – 1997

		1980	1985	1990	1991	1992	1993	1994	1995	1996	1997	Change 1997/96
Players												
Turntables	Average price FIM	850	700	800	850	650	750	650	700	750	700	–6.7
	Sales volume FIM million	35	46	18	11	5	5	6	3	3	4	33.3
CD players	Average price FIM	–	2 200	1 200	1 000	1 100	1 250	1 200	1 100	1 000	950	–5.0
	Sales volume FIM million	–	18	102	85	77	50	35	35	33	29	–12.1
Radio cassette recorders with CD-player	Average price FIM	–	–	–	–	–	1 100	950	900	800	700	–12.5
	Sales volume FIM million	–	–	–	–	–	40	66	86	92	84	–8.7
MD players	Average price FIM	–	–	–	–	–	–	–	–	–	2 000	–
	Sales volume FIM million	–	–	–	–	–	–	–	–	–	12	–
Other radio cassette recorders	Average price FIM	670	730	530	530	480	350	325	530	490	490	0.0
	Sales volume FIM million	104	204	138	112	71	32	30	22	20	15	–25.0
Open reel tape recorders	Average price FIM	3 500	–	–	–	–	–	–	–	–	–	–
	Sales volume FIM million	4	–	–	–	–	–	–	–	–	–	–
Tape decks	Average price FIM	1 100	950	1 300	1 200	1 150	1 300	1 400	1 250	1 200	1 200	0.0
	Sales volume FIM million	52	66	36	26	15	10	8	10	8	6	–25.0
Cassette recorders, Walkmans etc.	Average price FIM	350	270	265	260	300	280	280	265	230	230	0.0
	Sales volume FIM million	5	54	45	38	41	32	37	33	30	23	–23.3
Players total	Sales volume FIM million	200	388	339	272	209	169	182	189	186	176	–5.4
Hi-fi equipment												
Tuners	Average price FIM	950	700	825	950	950	900	900	900	900	900	0.0
	Sales volume FIM million	13	28	12	8	5	3	1	1	1	1	0.0
Amplifiers	Average price FIM	1 100	850	1 300	1 300	1 350	1 600	1 700	1 500	1 650	1 500	–9.1
	Sales volume FIM million	17	36	26	17	14	10	5	5	7	5	–28.6
Receivers	Average price FIM	1 300	1 100	1 600	1 650	1 550	2 050	2 050	1 900	2 000	2 000	0.0
	Sales volume FIM million	40	25	26	26	17	16	20	30	35	44	25.7
Loudspeakers	Average price FIM	–	–	–	–	–	–	–	425	600	650	8.3
	Sales volume FIM million	–	–	–	–	–	–	–	17	32	43	34.4
Headphones	Average price FIM	–	–	–	–	–	–	–	150	150	170	13.3
	Sales volume FIM million	–	–	–	–	–	–	–	16	22	24	9.1
Stereo sets	Average price FIM	2 400	2 200	2 200	2 200	2 600	2 900	2 700	2 350	2 300	2 000	–13.0
	Sales volume FIM million	115	110	163	143	148	148	174	197	223	196	–12.1
Hi-fi equipment total	Sales volume FIM million	185	199	227	194	184	177	200	266	320	313	–2.2

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

4.12 Audio equipment in households 1995 – 1998

	1995	1996	1997	1998
	%			
Turntable	53	44	47	46
Radiocassette recorder, total	75	74	82	85
CD player, total	35	45	57	60
Radiocassette recorder with CD player	..	35	44	48
Other radiocassette recorder	..	58	63	63
Separate CD-player	..	17	31	35

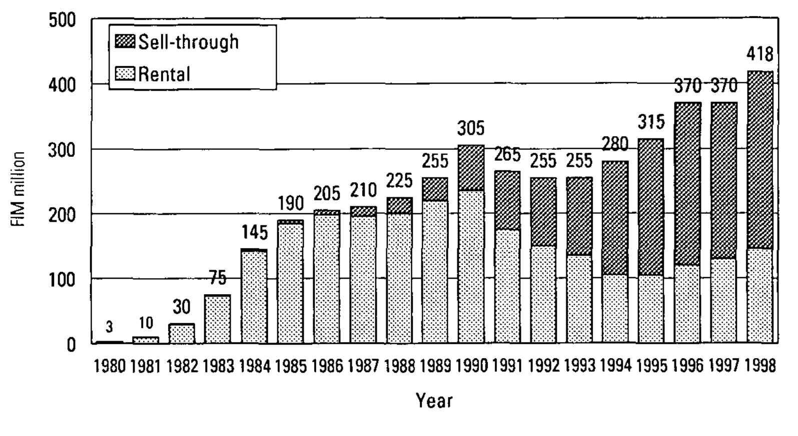
Source: Finnpanel, TV-household surveys

5 Video

Video rentals started in Finland at the beginning of the 1980s. Initially the market expanded very rapidly and by the mid-1980s its turnover exceeded FIM 200 million. Video rentals were very much the mainstay of the video business for many years. It was not until 1988 that the share of sell-through videos reached 10 per cent of total turnover. By the end of the decade the structure of the video market began to change: the growth of video rentals slowed down and started to decline while the market for sell-through videos continued to gather momentum. (Table 1 and Figure 1.)

Video sales have shown sustained growth until quite recently, contributing to the favourable overall market trends. In 1997 the total turnover of video recordings was around FIM 420 million, two-thirds of which came from sell-through videos (Table 1). The turnover of video rentals has also shown some growth during the past couple of years, for the first time since the late 1980s. The rental market has obviously benefited from the lowered price levels: it is estimated that within the past few years the average rental prices have dropped by around one-quarter (Table 2).

Figure 5.1 Video distribution turnover 1980 – 1998



Source: Table 5.1

The decline in the video rentals market has been clearly reflected in the declining number of video shops: at one stage the small rental shops that were set up during the early years of enthusiasm all but disappeared. Now, as the rental business has been picking up, new shops have been opened again. According to estimates published by the Finnish Film Distributor's Association, businesses specializing in video rentals had a total of 150 outlets across the country in 1997. (Table 5.)

As the market for sell-through videos expanded, more and more shops included video recordings in their selections. Today videos are sold in various kinds of shops. As some only sell videos occasionally, it is obviously difficult to estimate the total number of video outlets. The main outlets which sell videos include department stores, bookshops and supermarkets. It is estimated that there are a total of 1 500 sell-through outlets at the moment. The share of specialist shops is smaller among sell-through outlets than rental shops. (Table 5.)

The sell-through videos on the market are not entirely the same as rental videos or the films that are shown in cinemas. Whereas most rental videos are feature films, sell-through videos offer a much wider range of material, including videos related to leisure activities, keep-fit videos, children's programmes, music videos, etc.

Most of the video material comes from the United States. In Finland all programmes and films intended for video distribution must be examined by the Finnish Board of Film Classification or reported to the Board. In 1997, almost half of these videos were produced in the United States (Table 3). Some of the videos examined by the Board are intended for small designated groups, including "video magazines" for the deaf and videos on various leisure activities. The majority of these videos that are distributed among others by various organizations and institutions and videos on the lists of mail order companies come from other countries than the United States. Accordingly the share of American videos in video rental shops and sell-through outlets exceeds one-half. The share of domestic films in both the rental and sell-through category is very small.

There are 20 or so companies that import videos to Finland, but there are no more than a handful of significant players in turnover terms: all of these represent American film companies. The undisputed market leader has been Finnkino, which now belongs to the Rautakirja Group, the country's leading newspaper and magazine retailer and a major force in the retail trade of books. Finnkino was taken over in 1994 by Rautakirja and merged with Europa Vision, Rautakirja's video distribution company and market leader at the time. In 1997 Finnkino controlled 30 per cent of the video recordings market (Figure 4). Finnkino also owns Finland's largest cinema network and imports films for cinema distribution.

Finnkino's position in the video market is now changing, however. In 1996 it lost its representation of Disney's sell-through videos, which are now distributed by Disney's own distribution company Buena Vista. Buena Vista also controls the cinema distribution of Disney films. Finnkino has given up its chain of video rental shops, too.

The number of VCRs in Finnish households is continuing to increase slowly but steadily. In 1997 more than two-thirds of Finnish households had a VCR (Table 11). In certain socio-economic groups ownership of VCR is at an even higher level. For example, in 1996 four out of five entrepreneur or worker households had a VCR (Table 12). Among pensioners only about one in three households have a VCR. (Figure 2.)

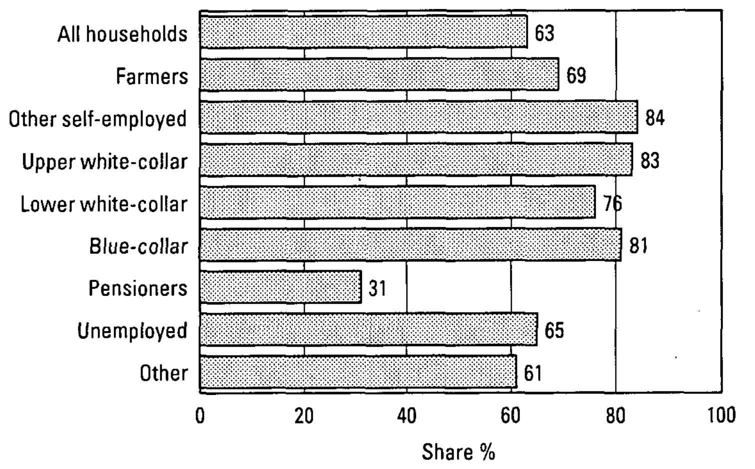
During the worst years of recession in the early 1990s, VCR sales declined by almost one half. Sales have now been improving again and have almost returned to the pre-recession level. Camcorder sales have also picked up. (Table 9.)

Until 1998 there have been changes in the use of VCR in the 1990s. The average daily reach of video has remained steadily at around ten per cent of the population (Table 6). The average daily viewing time has also remained more or less the same at just over ten minutes a day. In 1998, however, both the daily reach and the average viewing time did decline to some extent (Table 7).

The viewing of programmes recorded from television is far more common than viewing sell-through or rental videos. In 1998, three-quarters of total video viewing time was spent on viewing programmes recorded from television. (Figure 6.)

On average households with a VCR bought two video recordings and rented five videos in 1997. These figures are based on statistics compiled by the Finnish Film Distributors' Association, according to which a total of three million video recordings were sold in Finland last year. The total number of video rentals was around seven million. (Table 2.)

Figure 5.2 Household ownership of VCRs by socio-economic status 1996



Source: Table 5.12

The number one rented video in 1997 was Independence Day. Generally the top ten list of sell-through videos is dominated by Disney's animations and other American children's movies. In 1997, however, the number one spot was held by the re-released Star Wars trilogy. (Table 8.)

Statistical sources

Statistics on annual sales of video recordings are compiled by the Finnish Film Distributor's Association, which provides figures for both the total value and number of copies as well as for the shares of rental and sell-through videos.

The metered television audience studies carried out by Finnpanel since 1987 also include data on the use of VCRs. Detailed information on the use of VCRs is also obtained from the video surveys commissioned by the Ministry of Education in 1984, 1986 and 1989 and from the leisure survey carried out by Statistics Finland in 1991.

Statistics on the sale of VCRs and camcorders are compiled by the Domestic Appliances Association. These statistics are based on wholesalers' deliveries to retailers and on foreign trade statistics.

Statistical sources on video recordings have become scarcer in recent years. Since 1993 public libraries have no longer collected data on their video collections or on the number of lendings. The Finnish Composers' Copyright Society (Teosto) has also discontinued its statistics on the domestic production of videos on account of problems with comprehensiveness: Teosto was only receiving information on production in those companies with which it had a duplication contract.

Unlike previous statistics on Finnish mass media, this report does not refer to statistics on the imports of video recordings and blank videos maintained by the National Board of Customs. These statistics were always somewhat problematic in that the country of origin did not refer to the country where the contents were produced but to the country where the technical product was produced/duplicated. In addition, the estimation of numbers imported to the Finnish market was complicated by the re-export of cassettes and video recordings.

Customs declarations in connection with imports and exports to and from Community countries have no longer been required in Finland since it joined the European Union and its internal market. As from the beginning of 1995, statistics on foreign trade between these countries have been compiled on the basis of Intrastat statistical reports. Statistics on trade between Finland and non-EU countries is still based on customs declarations. The main problem caused by these changes to video statistics is that Intrastat reports are based on the weight of goods rather than unit numbers.

Rauli Kohvakka

Figures

Tables

5.1 Sales of video recordings 1980 – 1998*

	Video rentals		Sell-through		Total	
	FIM million	%	FIM million	%	FIM million	Fixed 1998 prices FIM million
1980	3	100	–	–	3	7
1981	10	100	–	–	10	20
1982	29	97	1	3	30	54
1983	73.5	98	1.5	2	75	124
1984	142	98	3	2	145	225
1985	185	97	5	3	190	278
1986	198	97	7	3	205	290
1987	196	93	14	7	210	286
1988	200	89	25	11	225	293
1989	220	86	35	14	255	311
1990	235	77	70	23	305	351
1991	175	66	90	34	265	292
1992	150	59	105	41	255	275
1993	135	53	120	47	255	269
1994	105	38	175	62	280	292
1995	105	33	210	67	315	325
1996	120	32	250	68	370	380
1997	130	35	240	65	370	375
1998	145	35	273	65	418	418

* *Estimates*

Sources: Finnish Group of IFPI
Finnish Film Distributors' Association

5.2 Number of videos sold, rental transactions and average prices 1990 – 1997

	Rental transactions	Average price	Videos sold	Average price
	Million	FIM	Million	FIM
1990	13	18	0.7	115
1991	12	18	1.1	74
1992	10	17	1.4	87
1993	6	23	1.8	67
1994	5	20	2.0	89
1995	6	16	1.9	109
1996	7	16	3.0	83
1997	7	18	3.0	80

Sources: Finnish Film Distributors' Association
European Video Directory

5.3 Inspected video programmes by country of origin 1990 – 1997*

Country of origin	1990		1991		1992		1993	
	Number	%	Number	%	Number	%	Number	%
National	419	15.2	277	14.4	351	23.5	316	26.5
Other EU countries	925	33.5	501	26.1	341	22.8	194	16.3
Other European countries	19	0.7	45	2.3	6	0.4	13	1.1
Europe total**	**1 363**	**49.4**	**823**	**42.9**	**698**	**46.7**	**523**	**43.9**
Of which other Nordic countries	91	3.3	35	1.8	36	2.4	61	5.1
USA	1 265	45.8	1 030	53.7	718	48.0	581	48.8
Other countries	133	4.8	65	3.4	80	5.3	39	3.3
Co-productions***	–	–	–	–	–	–	48	4.0
Unknown	–	–	–	–	–	–	–	–
All total*****	**2 761**	**100.0**	**1 918**	**100.0**	**1 496**	**100.0**	**1 191**	**100.0**

5.3 Continued

Country of origin	1994		1995		1996		1997	
	Number	%	Number	%	Number	%	Number	%
National	310	29.3	411	33.4	235	22.7	231	23.4
Other EU countries	148	14.0	150	12.2	116	11.2	170	17.2
Other European countries	13	1.2	1	0.1	8	0.8	7	0.7
Europe total**	**471**	**44.5**	**562**	**45.7**	**359**	**34.7**	**408**	**41.3**
Of which other Nordic countries	24	2.3	10	0.8	9	0.9	10	1.0
USA	490	46.3	562	45.7	521	50.3	454	46.0
Other countries	55	5.2	55	4.5	67	6.5	76	7.7
Co-productions***	43	4.1	51	4.1	75	7.2	49	5.0
Unknown	–	–	–	–	13	1.3	–	–
All total*****	**1 059**	**100.0**	**1 230**	**100.0**	**1 035**	**100.0**	**987**	**100.0**

* *Feature films and programmes intended for video distribution inspected by the Finnish Board of Film Classification or reported to it.*

** *European co-productions are not included. They are included in co-productions.*

*** *In 1990–1992 co-productions are included in the figures for each participating country, so the figures include co-productions more than once.*

**** *Information about country of origin was not available for all inspected video programmes. The figures for the total number of videos and programmes thus differ from those of Table 5.4.*

Source: Finnish Board of Film Classification

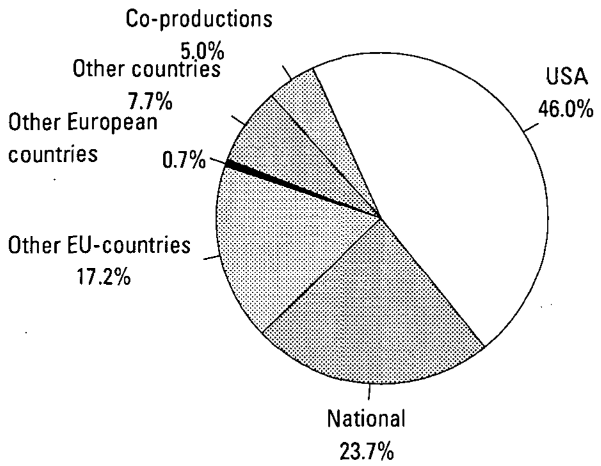
5.4 Inspected video programmes by type of programme 1990 – 1997*

Type of programme	Fiction		Animation		Documentary		Others**		Total	Total
	No.	%	No.	%	No.	%	No.	%	No.	%
1990	1 891	67.3	305	10.9	222	7.9	392	14.0	2 810	100.0
1991	1 314	68.7	237	12.4	85	4.4	276	14.4	1 912	100.0
1992	765	52.3	158	10.8	361	24.7	179	12.2	1 463	100.0
1993	630	52.7	211	17.7	274	22.9	80	6.7	1 195	100.0
1994	508	47.3	198	18.4	298	27.7	70	6.5	1 074	100.0
1995	539	43.5	202	16.3	455	36.7	44	3.5	1 240	100.0
1996	554	53.5	186	18.0	251	24.3	44	4.3	1 035	100.0
1997	558	56.5	132	13.4	211	21.4	86	8.7	987	100.0

* *Films and programmes examined by the Finnish Board of Film Classification.*
** *Includes mainly music and hobby videos.*

Source: Finnish Board of Film Classification

Figure 5.3 Videos examined by country of origin 1997



Source: Table 5.3

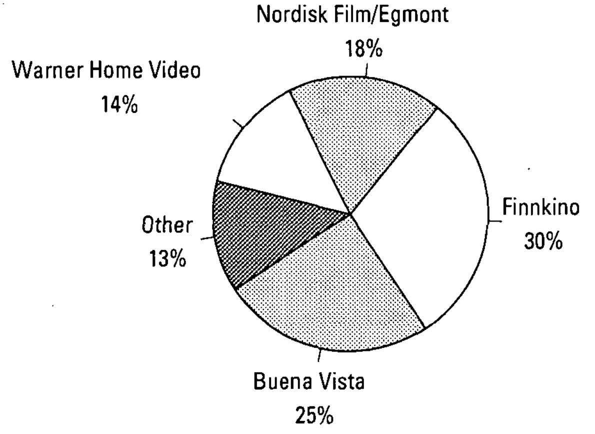
5.5 Video rental and sales outlets 1990 – 1997*

	Rental shops					Sales outlets				
	1990	1994	1995	1996	1997	1990	1994	1995	1996	1997
	No.					No.				
Specialist dealers	120	100	150	150	150	50	30	50	50	50
Department stores/supermarkets	150	–	–	–	–	400	550	650	650	650
Others**	1 700	1 000	900	850	850	250	750	750	800	800
Total	1 970	1 100	1 050	1 000	1 000	700	1 330	1 450	1 500	1 500

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

Source: Finnish Film Foundation statistics

Figure 5.4 Market shares of videocassette distributors 1997



Source: Finnish Film Distributor's Association

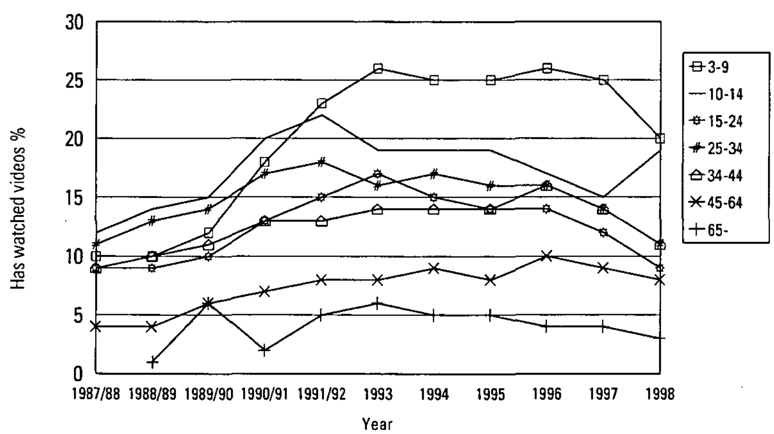
5.6 Daily reach of video 1989/90 – 1998

	1989/90	1990/91	1991/92	1993	1994	1995	1996	1997	1998
	%								
All	9	11	12	12	12	12	12	11	9
Access to video									
Has access	17	19	18	17	17	16	16	..	..
Sex									
Women	8	10	11	11	12	11	12	10	9
Men	10	13	14	14	13	12	13	11	10
Age									
3 – 9 years*	12	18	23	26	25	25	26	25	20
10 – 14 years	15	20	22	19	19	19	17	15	19
15 – 24 years	10	13	15	17	15	14	14	12	9
25 – 34 years	14	17	18	16	17	16	16	14	11
35 – 44 years	11	13	13	14	14	14	16	14	11
45 – 64 years	6	7	8	8	9	8	10	9	8
65 – years	6	2	5	6	5	5	4	4	3
Occupation									
Farmers	5	6	7	6	7	5	7	6	5
Blue-collar	9	11	12	12	12	11	11	11	9
Lower white-collar	8	10	11	12	12	11	12	10	8
Upper white-collar	8	10	10	11	11	10	11	10	8
Schoolchildren & students	12	15	17	16	16	16	15	13	12

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

Sources: Finnpanel Oy; YLE Recearch and Development.

Figure 5.5 Daily reach of video by age group on average day 1987/88 – 1998



Source: Table 5.6

5.7 Average viewing time of video 1989/90 – 1998

	1989/90	1990/91	1991/92	1993	1994	1995	1996	1997	1998
	Minutes/day								
All	7	10	11	10	10	10	11	8	6
Access to video									
Has access	13	16	16	14	14	13	14	..	..
Sex									
Women	7	9	10	9	10	9	10	9	6
Men	8	11	12	11	11	10	11	9	6
Age									
3 – 9 years*	8	15	22	25	25	24	26	24	16
10 – 14 years	12	17	17	16	15	14	15	11	13
15 – 24 years	7	11	14	15	14	12	12	10	7
25 – 34 years	12	17	19	14	15	15	14	13	9
35 – 44 years	8	10	10	10	11	12	14	10	7
45 – 64 years	4	6	6	6	7	7	8	7	5
65 – years	1	2	4	5	5	4	3	2	1
Occupation									
Farmers	4	5	6	4	5	4	6	7	6
Blue-collar	7	10	11	11	11	10	10	8	6
Lower white-collar	6	8	9	9	10	9	11	8	5
Upper white-collar	6	7	8	9	8	8	10	7	5
Schoolchildren & students	10	15	16	14	13	13	13	11	4

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

Sources: Finnpanel Oy; YLE Recearch and Development.

5.8 Top ten rental and sell-through video releases 1997

Rental

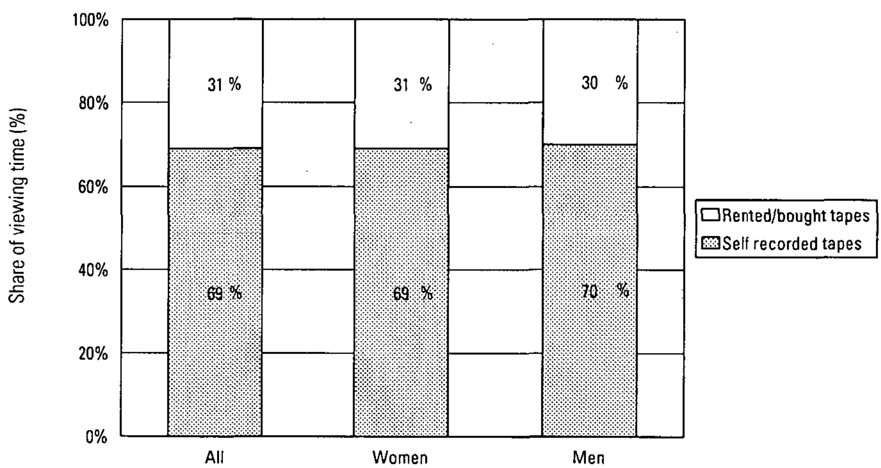
Name	Distributor	Rental revenues FIM
Independence Day	Finnkino	1 026 293
Mission Impossible	Finnkino	938 863
The Fifth Element	Buena Vista	800 113
Con Air	Buena Vista	794 278
Twister	Finnkino	787 923
Eraser	Warner	749 000
Spy Hard	Buena Vista	724 840
Ransom	Buena Vista	712 677
The Long Kiss Goodnight	Warner	705 000
Devil's own	Finnkino	701 377

Sell-through

Name	Distributor	Copies sold No.
Star Wars Trilogy	Finnkino	78 109
Lady and the Tramp	Buena Vista	73 863
101 Dalmatians	Buena Vista	62 353
The Huncback Of Notre Dame	Buena Vista	61 962
Independence Day	Finnkino	55 618
Winnie The Pooh	Buena Vista	50 146
Dumbo	Buena Vista	40 304
The Long Kiss Goodnight	Warner	40 029
Seven	Warner	39 300
Space Jam	Warner	39 091

Source: Finnish Film Foundation statistics

Figure 5.6 Viewing time of VCR by source of recordings 1998



Source: MDC Helsinki Group-Media research Ltd

5.9 Retail sales of VCRs and camcorders 1980 – 1997*

	1980	1985	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	Change 1997/96
	1 000 units													%
VCRs	6	130	145	180	190	195	190	130	102	105	139	160	185	15.6
Camcorders	0	5	8	12	24	30	28	18	9	8	10	16	22	37.5

* *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.

5.10 Average prices and sales volumes of VCRs and camcorders 1980 – 1997*

		1980	1985	1987	1988	1989	1990	1991
VCRs	Average price FIM	5 100	3 800	3 100	2 875	2 675	2 400	2 100
	Sales volume FIM million	31	494	450	518	508	468	399
Camcorders	Average price FIM	–	16 000	8 500	8 000	7 200	5 600	5 100
	Sales volume FIM million	–	42	68	96	173	168	143

5.10 Continued

		1992	1993	1994	1995	1996	1997	Change 1997/96 %
VCRs	Average price FIM	1 900	2 600	2 600	2 400	2 100	1 750	–16.7
	Sales volume FIM million	247	265	273	334	336	324	–3.6
Camcorders	Average price FIM	4 900	5 600	5 300	4 600	4 200	4 000	–4.8
	Sales volume FIM million	88	50	42	46	67	88	31.3

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

Source: Domestic Appliances Association.

5.11 Household ownership of VCRs and camcorders 1995 – 1997

	1995	1996	1997
	%		
VCR	60	63	71
One VCR	–	54	59
Two or more VCRs	–	9	12
Camcorder	9	8	11

Source: Finnpanel Oy, TV-household surveys

5.12 Household ownership of VCRs and camcorders by socio-economic status 1996

	VCR	Camcorder
	%	
All households	63	9
Farmers	69	7
Other self-employed	84	25
Upper white-collar	83	17
Lower white-collar	76	10
Blue-collar	81	9
Pensioners	31	4
Unemployed	65	8
Others	61	10

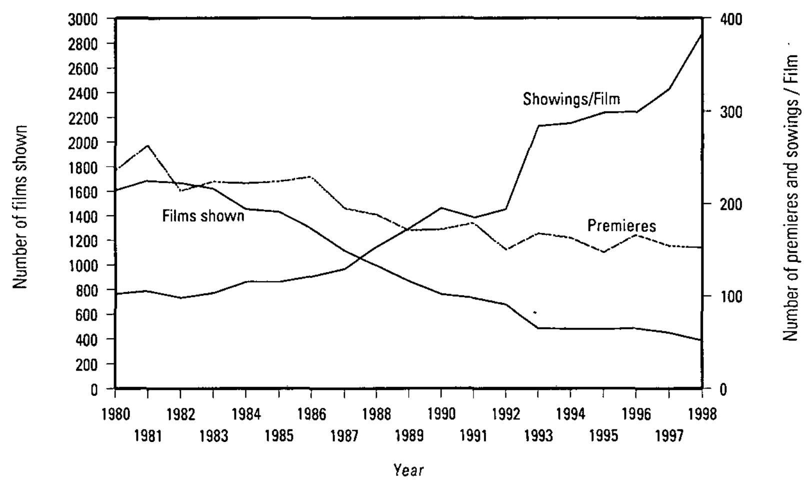
Source: Statistics Finland: Household survey

6 Films

The changes that swept the Finnish film scene in the 1980s have to some extent continued during the 1990s. In the 1980s, cinemas and film importers were faced with a serious stiffening of competition: films were now being rented and sold on video, and at the same time national television channels were screening more and more films every year. A particular concern for theatres and film offices was that the number of cinema-goers was steadily declining.

The film sector resorted to various strategies at the same time. Firstly, the number of theatres was reduced during the 1980s by around 50; a further 30 have been closed down during the 1990s. At year-end 1998, there remained no more than 232 cinema theatres in Finland. The nature of theatres also changed. Old theatres with one or two large auditoria were divided into smaller units, and any new cinemas that were opened were multi-screen theatres. Therefore, in spite of the declining number of theatres, there has been hardly any change in the number of auditoria. (Table 3.)

Figure 6.1 Films shown, premieres and average number of showings per film 1980 – 1998



Source: Table 6.2

Now, as we approach the millennium, a second wave of changes has got under way. This has seen the opening in late 1998 of the first megatheatres with ten or more auditoria. For the film-goer the new and refurbished theatres also provide for a more enjoyable experience: for the first time in a long while, serious efforts are now being made to raise service standards in cinemas. In this regard Finland clearly lags behind the development in other Western European countries.

The reforms in the structure of cinema theatres were soon followed by changes in their programming. First of all the number of films shown was sharply reduced during the 1980s and to some extent in the early 1990s. In 1998 a total of 384 films were screened in Finland's theatres, more than one thousand less than in 1980. The number of premieres also dropped to some extent in the 1980s. Although this figure has remained more or less unchanged during the 1990s (152 premieres in 1998), there has been a definite trend towards a larger proportion of new films in that the total number of films shown has been sharply reduced. Indeed the number of premieres as a proportion of the total annual number of films in circulation has almost doubled to 40 per cent. Film offices and theatres have changed their strategy: their aim now is to turn out a better result with a smaller number of films. (Table 2 and Figure 1.)

The reduced number of films shown has also implied a growing number of showings per film. In recent years the average number of showings per film has been over 300: this is three times more than in the mid-1980s (Table 2 and Figure 1).

In 1994 one of the biggest operators in the film business, Finnkino, was taken over by Rautakirja Group, which has operations in several retail sectors. Finnkino had been in serious financial straits and the search had been on for a buyer for quite some while. Finnkino had long been the biggest importer of films in Finland, accounting for around 50 per cent of all theatre premieres (Table 5). The market share of other film offices has been in the region of just over ten per cent. The market share of Finnkino is now set to decline: the company has said it will be investing more in its cinema theatres at the expense of distribution.

There have also been other changes in the import and distribution of films. The distribution of films from US studios has been reorganized and new film offices have set up in Finland. Disney's films are now imported by the studio's own distributor Buena Vista. Columbia TriStar has also joined forces with the Danish operator Egmont to set up a film office, which will also be distributing films from Fox's studios. For domestic film producers it is noteworthy that these new film offices have also taken domestic films on board; previously the distribution of domestic films was handled almost exclusively by Finnkino.

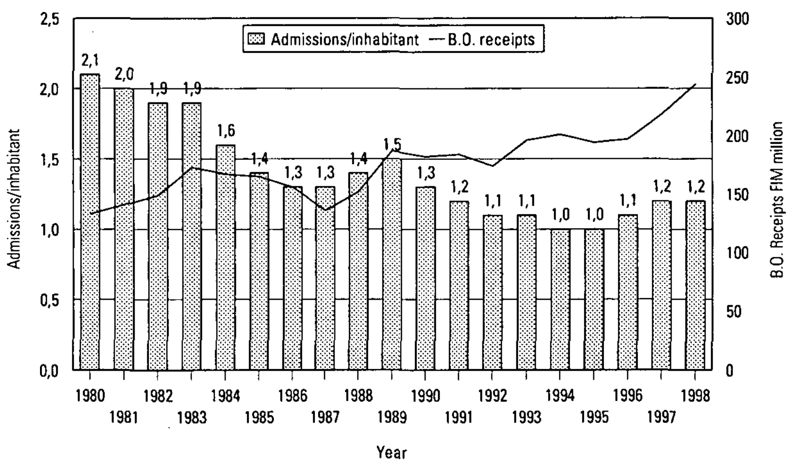
Finnkino has also played a major part in the screening of films. When the company was founded in the early 1980s to continue the operations of three major cinema chains, it took over no less than 135 cinemas. Most of these were sold off or closed down as part of a reorganization scheme. Since the takeover in 1994, a new programme has been launched to reorganize Finnkino's network of theatres. The company has sold off some of its theatres specialising in high-brow films at least in Turku and Helsinki. With the money and the backing of the Rautakirja Group, Finnkino is now much better placed to invest in its theatres. Indeed in early 1999 a new multiplex theatre with 14 auditoria was opened in Helsinki. In addition, the company has plans to open new theatres in some of the biggest cities around the country.

At year-end 1997 Finnkino had 26 theatres with a total of 74 auditoria in nine different cities. This means that Finnkino controls just under one-quarter of all auditoria in Finland. Finnkino is also involved in the distribution of films on video. (see Chapter 5.)

Foreign companies have recently entered not only the radio and television market in Finland but also the cinema theatre business. Sandrews-Metronome, which is in joint Swedish, Danish and Norwegian ownership, joined forces with a few domestic operators to open a theatre with 10 auditoria in Helsinki in 1998. Prior to this the new operator had already acquired one theatre in Helsinki.

The increase in the number of films shown on television has continued. The number of films screened by the nationwide channels YLE TV1 and TV2 as well as MTV3 has tripled during the past ten years: in 1986 the three channels screened a total of 329 films, in 1997 the figure was 1028. Channel Four Finland, which was launched in summer 1997, screened 150 films during its first six months. (Table 8.)

Figure 6.2 Cinema admissions per inhabitant and Box Office receipts 1980 – 1998



Source: Table 6.3

Films are also screened by pay-tv channels. In 1997, Canal Plus screened some 1000 films to its satellite and cable subscribers (Table 8). Canal Plus was merged in 1997 with Nethold, owner of the Filmnet channels: since this merger all Filmnet channels accessible in Finland were changed into Canal Plus channels. In addition, viewers in Finland can get two pay-tv film channels (TV1000) operated by the Modern Times Group.

During the 1990s the annual number of cinema admissions has remained at the same low level to which it dropped in the 1980s. Today, the average number of cinema admissions in Finland is 1.2 per year; at the beginning of the 1980s the average was still two admissions a year. In many Western European countries people go to the cinema far more often (on average twice a year) than they do in Finland, and that figure has actually been increasing during the 1990s (see Table 13 in chapter 12 International comparisons). However there are signs even in Finland that the numbers are picking up: in 1997 the number of admissions increased by eight per cent and in 1998 by a further eight per cent. In 1998 a total of 6.4 million cinema tickets were sold and total Box Office receipts amounted to FIM 244 million. (Table 3 and Figure 2.)

At the moment, especially the popularity of domestic films seems to be improving. In the darkest years of the 1990s just over 200 000 people went to see a Finnish film, whereas in 1998 the total audience figure of domestic films approached 700 000 and in 1999 it reached one million already in the first four months. The popularity of Finnish film has thus returned, for the moment, to the level where it was in the mid 1980s. (Table 2.)

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 statistics on the number of cinema admissions, cinema operations, domestic film production and imported films as well as film showings. Data are also included on films screened on television and on video.

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

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 from the Finnish Film Foundation's publication.

Rauli Kohvakka

Figures

Tables

6.1 Turnover of film exhibition 1980 – 1997*

Year	Turnover FIM million	Fixed (1997) prices FIM million
1980	136	296
1985	173	250
1986	160	223
1987	139	187
1988	155	199
1989	191	230
1990	186	211
1991	188	205
1992	178	189
1993	199	207
1994	205	211
1995	200	204
1996	203	205
1997	225	225

* *Includes B.O. receipts and advertising revenues.*

Source: Statistics Finland

6.2 Film exhibition 1980 – 1998

Year	Films shown total	Premieres	Finnish feature films	Showings	Showings/ film	Showings/ auditorium	Viewers/ showings	Finnish films share of viewers
	No.	No.	No.	'000	No.	No.	No.	%
1980	1 608	236	10	163.8	102	465.0	60.6	15.4
1985	1 433	224	13	164.6	115	435.0	40.7	21.6
1986	1 297	229	21	156.4	121	411.0	40.4	22.7
1987	1 115	195	13	144.1	129	405.0	45.2	14.7
1988	995	188	10	152.6	153	431.0	43.8	11.3
1989	868	171	10	150.3	173	437.0	48.2	7.4
1990	762	172	13	148.5	195	437.0	41.7	13.8
1991	733	179	12	135.3	185	406.0	44,6	13.0
1992	680	150	10	132.0	194	400.0	40,9	10.9
1993	487	168	13	138.0	284	412.0	41.7	6.3
1994	483	163	11	138.6	287	425.0	40.5	4.1
1995	479	147	8	143.1	298	433.0	37.0	10.5
1996	488	166	10	146.0	299	449.0	37.6	3.7
1997	452	154	9	146.0	324	456.0	40.5	5.4
1998	384	152	8	148.9	388	450.0	43.0	10.4

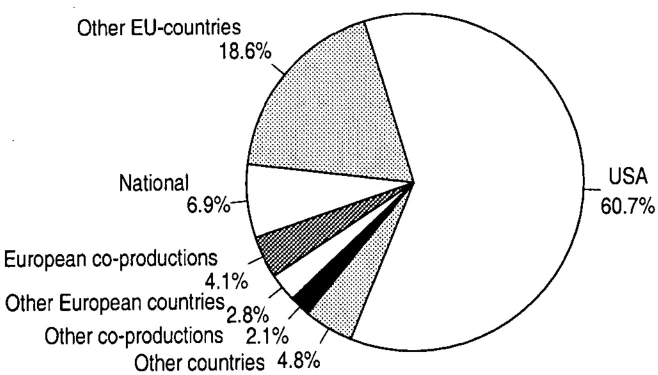
Source: Finnish Film Foundation statistics

6.3 Number of cinemas, auditoria, number of seats, cinema admissions, Box Office and average price of cinema ticket 1980 – 1998

	Cinemas	Auditoria	Auditoria in urban areas	Municipalities with cinema		Seats	Cinema admissions	Admissions per inhabitant	Box Office receipts	Average price of ticket
Year	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
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	1.2	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	74.0	181	39.3	60.8	5.8	1.1	196	34.0
1994	240	326	73.9	179	38.9	58.6	5.6	1.0	201	35.8
1995	241	330	74.2	180	39.6	58.4	5.3	1.0	194	36.5
1996	236	325	74.2	178	39.1	57.2	5.5	1.1	197	35.9
1997	234	321	75.7	174	38.5	55.5	5.9	1.2	218	36.7
1998	232	331	..	..	..	57.3	6.4	1.2	244	38.1

Source: Finnish Film Foundation statistics

Figure 6.3 Film premieres by country of origin 1997



Source: Table 6.4

6.4 New feature films released by country of origin 1985 – 1997

Country of origin	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
	Number of films												
National	13	21	13	10	10	14	12	10	13	11	8	10	9
Other EU countries*	38	43	42	38	24	31	19	24	27	29	25	35	26
Other European countries	13	18	18	10	8	9	3	3	2	–	–	–	4
European co-productions	14	11	–	4	1	2	6	8	1	2	4	15	7
Europe total	**78**	**93**	**73**	**62**	**43**	**56**	**40**	**45**	**43**	**42**	**37**	**60**	**46**
Of which other Nordic countries	5	9	8	9	4	9	7	9	8	4	5	9	5
USA	125	115	112	110	110	110	119	91	97	97	86	87	88
Other	10	6	6	5	7	4	14	5	12	10	11	12	8
Other co-productions**	5	7	2	6	5	2	1	3	3	3	5	3	3
All total	**218**	**221**	**193**	**183**	**165**	**172**	**174**	**144**	**155**	**152**	**139**	**162**	**145**

Country of origin	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
	%												
National	6.0	9.5	6.7	5.5	6.1	8.1	6.9	6.9	8.4	7.2	5.8	6.2	6.2
Other EU countries*	17.4	19.5	21.8	20.8	14.5	18.0	10.9	16.7	17.4	19.1	18.0	21.6	19.9
Other European countries	6.0	8.1	9.3	5.5	4.8	5.2	1.7	2.1	1.3	–	–	–	2.8
European co-productions	6.4	5.0	–	2.2	0.6	1.2	3.4	5.6	0.6	1.3	2.9	9.3	4.1
Europe total	**35.8**	**42.1**	**37.8**	**33.9**	**26.1**	**32.6**	**23.0**	**31.3**	**27.7**	**27.6**	**26.6**	**37.0**	**31.7**
Of which other Nordic countries	2.3	4.1	4.1	4.9	2.4	5.2	4.0	6.3	5.2	2.6	3.6	5.6	3.4
USA	57.3	52.0	58.0	60.1	66.7	64.0	68.4	63.2	62.6	63.8	61.9	53.7	60.7
Other	4.6	2.7	3.1	2.7	4.2	2.3	8.0	3.5	7.7	6.6	7.9	7.4	5.5
Other co-productions**	2.3	3.2	1.0	3.3	3.0	1.2	0.6	2.1	1.9	2.0	3.6	1.9	2.1
All total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

* *Current member states of the European Union.*

** *Includes also partly European co-productions.*

Source: Finnish Film Foundation statistics

Processed

6.5 Feature film premieres by distributor 1988 – 1997

Distributor	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	Total 1988 – 1997
	Number of films										
Finnkino Oy	60	67	78	100	85	92	90	69	81	66	788
Warner Bros. Oy	30	39	38	24	20	21	24	20	23	19	258
United Pictures Oy	22	26	24	20	17	20	19	23	18	12	201
Cinema Mondo Oy	–	–	–	1	3	7	5	12	11	16	55
Europa Vision Oy	18	9	5	–	–	–	–	–	–	–	32
Walhalla	3	2	4	5	4	4	4	3	5	2	36
Kosmos-Filmi Oy	7	5	6	1	–	–	–	–	–	–	19
Kinoscreen	–	–	5	8	5	5	4	2	2	4	35
Alfapanorama Film	–	–	–	1	–	–	2	11	18	–	32
Suomen elokuvakont.	1	6	–	–	–	8	6	1	1	1	24
Oulun elok.	2	1	4	3	1	2	3	–	1	–	17
EL-KO Films Ky	–	5	1	3	1	1	3	–	–	–	14
Kamras Film Group	–	–	–	–	–	–	–	–	–	16	16
Mio-Filmi	2	1	2	3	1	3	–	–	–	–	12
Other distributors	49	10	5	10	13	5	3	6	6	18	154
Total	194	171	172	179	150	168	163	147	166	154	1 664

Source: Finnish Film Foundation statistics.

Processed

6.6 Film production companies by number of produced feature films 1988 – 1997

Company	Number of produced films*										Total
	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1988–1997
Villealfa Filmprod. Oy**	1	3	3	1	3	3	2	1	3	1	21
Spede-Tuotanto Oy***	2	–	2	1	1	2	2	–	–	–	10
Filminor Oy	1	1	2	1	–	1	–	–	1	–	7
National-Filmi Oy	3	1	2	–	–	–	–	–	–	–	6
Ere Kokkonen Oy	–	–	–	1	1	1	1	–	1	1	6
Kinotuotanto Oy	–	–	–	1	–	1	1	1	–	2	6
Reppufilmi Oy	–	1	–	2	1	1	–	–	–	1	6
FantasiaFilmi Oy	–	1	–	1	1	1	1	–	1	–	6
Artista-Filmi Oy	–	–	–	–	–	–	1	1	1	1	4
Visa Mäkinen Productions Oy	–	1	–	–	1	–	–	–	–	–	2
Filmitakomo Oy	–	–	–	–	1	1	–	–	–	–	2
Jörn Donner Productions Oy	–	–	1	–	–	–	–	1	–	–	2
LR-Film Productions Oy	–	–	–	1	–	1	–	–	–	–	2
Filmizolfo Oy	–	1	–	–	–	–	1	–	–	–	2
R-Filmi Production Oy	–	–	–	–	–	1	1	–	–	–	2
Filmi-Molle	–	–	1	–	–	–	1	–	–	–	2
Dada-Filmi Oy	–	–	–	–	1	–	–	1	–	–	2
Gnu Films	–	–	–	–	–	–	–	–	–	2	2
Other companies	3	2	2	2	2	3	2	5	3	3	27
Foreign companies****	3	3	2	0	1	5	5	2	2	1	24

* *Films in the production of which the company has been involved as a producer. The figure thus includes also co-productions. Co-productions have been recorded as one film for each company involved.*

** *The figure comprises also following companies belonging to the same group: Sputnik Oy, Last Border Productions Oy and Marianna Filmi Oy.*

*** *The figure comprises also following companies belonging to the same group: Spede Team Oy, Filmituotanto Spede Pasanen and Spede Studio Oy.*

**** *As partners in co-productions.*

Source: Finnish Film Foundation statistics

Processed

6.7 Finnish films reviewed and graded and tv-commercials shown on MTV-Finland 1980 – 1997

Year	35 mm films				16 mm films	8 mm films	Video films	Video discs	Total	Commer-cials on MTV-Finland	Channel Three ad-vertising films
	Feature films*	Short films	Adver-tising films**	Cinema adver-tisements							
1980	10	18	162	12	104	9	–	–	315	1 448	–
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	3 868	..
1993	28	22	28	14	13	–	52	5	162	4 699	–
1994	25	16	28	12	19	–	37	–	137	5 475	–
1995	20	11	41	8	14	–	24	–	118	6 305	–
1996	15	19	40	9	6	–	38	–	127	..	–
1997	24	14	35	12	2	–	38	–	125	..	–

* Includes long documentary films
** Shown at cinemas

Sources: Finnish Film Foundation statistics

6.8 Feature films shown on television 1985 – 1997

Channel	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	Share of Finnish films
	No.													%
YLE TV1*	109	109	143	166	133	174	196	176	242	221	319	334	323	14
YLE TV2*	104	95	118	97	83	153	146	122	223	174	259	267	313	14
MTV	70	95	79	88	86	92	70	65	261	256	239	330	..	..
Channel Three**	–	30	260	190	219	254	258	255						
Channel Four Finland***	–	–	–	–	–	–	–	–	–	–	–	–	151	–
Total	**283**	**329**	**600**	**541**	**521**	**673**	**670**	**618**	**726**	**651**	**817**	**931**	**1 179**	**..**
PTV	..	..	..	..	..	..	..	..	..	..	110	234	–	–
Canal Plus	..	..	..	..	..	..	..	..	..	..	930	1 054	809	..
Canal Plus Gold	..	..	..	..	..	..	..	..	..	..	878	948	784	0.5
TV 1000 & TV 1000 Cinema	..	..	..	..	..	..	..	..	..	..	..	..	392	0.3

* 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.
*** Started 1.6.1997.

Sources: YLE; MTV Oy; Oy Kolmostelevisio Ab; Channel Four Finland, Canal Plus, TV 1000

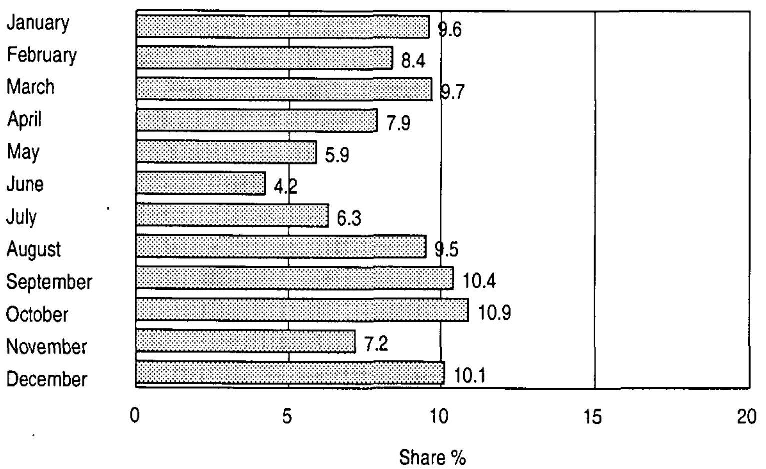
6.9 Biggest cinema towns in Finland 1997

Town	No. of cinema auditoria	No. of visits to cinema	Proportion of all visits	Visits per inhabitant	Proportion of turnover
	No.	'000	%	No.	%
Helsinki	42	2 031	34.2	3.8	34.9
Tampere	13	475	8.0	2.5	8.0
Turku	12	417	7.0	2.5	7.2
Jyväskylä	9	267	4.5	3.5	4.6
Oulu	10	243	4.1	2.1	4.3
Lahti	6	155	2.6	1.6	2.6
Kuopio	6	138	2.3	1.6	2.4
Vaasa	6	104	1.8	1.8	1.7
Pori	5	99	1.7	1.3	1.7
Joensuu	3	94	1.6	1.8	1.6
Total	112	4 023	67.7		69.1
Whole country	321	5 942	100.0	1.2	100.0

Source: Finnish Film Foundation statistics

Processed

Figure 6.4 Cinema admissions by month 1997



Total admissions 5 942 788

Source: Table 6.13

6.10 Top ten Finnish and foreign films: share of total admissions and Box Office 1982 – 1997

	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
1993		
top ten Finnish films	5.8	5.5
top ten foreign films	36.1	37.3
1994		
top ten Finnish films	3.8	3.7
top ten foreign films	38.3	39.1
1995		
top ten Finnish films	9.8	10.1
top ten foreign films	33.1	34.7
1996		
top ten Finnish films	3.5	3.2
top ten foreign films	40.8	42.5
1997		
top ten Finnish films	5.3	5.2
top ten foreign films	36.6	33.9

Source: Finnish Film Foundation statistics

Processed

6.11 Cinema admissions by originating country of films 1997

Country of origin	Viewers	%
National	330 652	5.6
Other EU countries	1 026 292	17.3
Other European countries	15 517	0.3
European co-productions	35 998	0.6
Europe total	**1 408 459**	**23.7**
Of which other Nordic countries	88 607	1.5
USA	4 337 476	73.0
Other	100 417	1.7
Other co-productions*	96 436	1.6
All total	**5 942 788**	**100.0**

* *Includes also partly European co-productions.*

Source: Finnish Film Foundation statistics

Processed

6.12 Top ten films 1997

	Premiere	Viewers	Box office receipts 1 000 FIM
Finnish films			
Kummeli Kultakuume – Kummeli Gold Fever	1997	100 051	3 830
Pekko ja Unissakävelijä	1997	79 856	2 726
Sairaan kaunis maailma – Freakin' Bautiful World	1997	67 815	2 336
Vääpeli Körmy ja kahtesti laukeava	1997	31 403	1 152
Neitoperho – The Collector	1997	11 537	433
Vaiennut kylä – The Village	1997	10 545	387
Kauas pilvet karkaavat – Drifting Clouds	1996	5 324	158
Lunastus – The Redemption	1997	3 365	122
Elämä lyhyt Rytkönen pitkä	1996	3 299	108
Sagojogan ministeri – The Minister of State	1997	1 947	59
Total		315 142	11 311
Share of viewers and Box office receipts in 1997 (%)		5.3	5.2
Foreign films			
Bean-The Ultimate Disaster Movie	1997	386 976	14 863
Men in Black	1997	288 902	10 651
The Lost World - Jurassic Park	1997	258 983	10 041
101 Dalmatians	1997	211 304	7 580
Liar Liar	1997	206 181	7 498
The English Patient	1997	197 997	8 014
Tomorrow Never Dies	1997	182 285	6 997
Romeo & Juliet	1997	157 746	5 650
The First Wives Club	1997	150 461	5 653
The Fifth Element	1997	135 839	4 508
Total		2 176 674	81 455
Share of viewers and Box office receipts in 1997 (%)		36.6	37.3

Source: Finnish Film Foundation statistics

Processed

6.13 Cinema admissions by month 1996 – 1997

	Admissions 1996	%	Admissions 1997	%
January	482 895	8.8	567 721	9.6
February	564 500	10.3	498 390	8.4
March	588 201	10.7	576 740	9.7
April	419 122	7.6	468 859	7.9
May	349 150	6.4	351 106	5.9
June	204 531	3.7	247 927	4.2
July	327 208	6.0	373 078	6.3
August	437 734	8.0	566 411	9.5
September	484 768	8.8	617 370	10.4
October	641 634	11.7	646 371	10.9
November	563 052	10.3	429 153	7.2
December	424 199	7.7	599 662	10.1
Total	5 486 994	100.0	5 942 788	100.0

Source: Finnish Film Foundation statistics

6.14 Cinema–going during past 6 months 1992 – 1998

	Has been to the cinema %	Has not been to the cinema %	Total %
All			
1992	31	69	100
1994	31	69	100
1996	30	69	100
1998	43	56	100
1998			
Women	47	53	100
Men	39	59	100
Age			
15 – 24	66	33	100
25 – 44	49	51	100
45 – 59	29	70	100
60 –	16	83	100

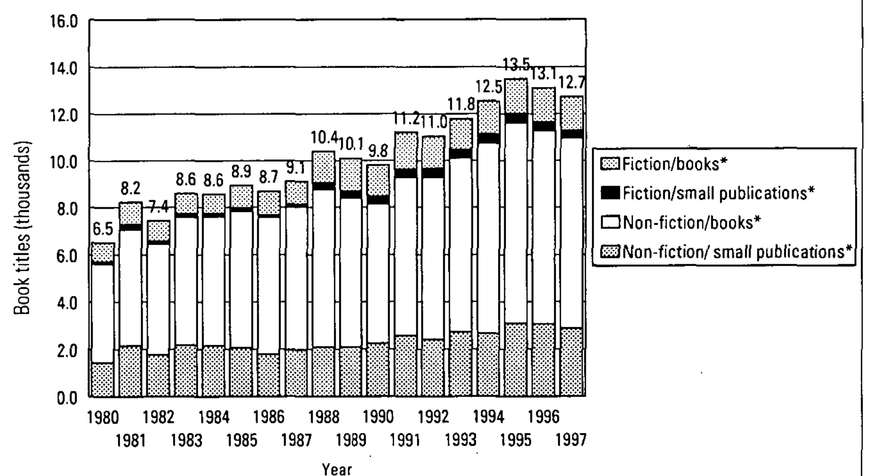
Source: MDC Helsinki Group-Media Research Ltd.

7 Books and libraries

Book publishing has shown strong growth during the past twenty years. In 1997 the total number of book titles published in Finland was almost 12 000, which is about one-quarter up on the figure for 1990 and twice as many as in 1980 (Table 3 and Figure 1). This figure includes all categories and all types of literature: fiction and non-fiction titles issued by publishing houses and publications from other sources such as public administration, universities and organizations. It also includes small publications (5–48 pages), which account for just over one-quarter of the total number of titles. Most of the literature published in Finland is in the non-fiction category: in 1997 non-fiction accounted for 86 per cent of all titles. The number of titles in both the fiction and non-fiction category has increased.

It is quite interesting to see that book publishing has grown so vigorously during the past couple of decades: after all this has often been regarded as an era marked first and foremost by the growth and expansion of electronic mass media. However, it seems that the continuing growth of radio and television has had no adverse effects on book publishing.

Figure 7.1 Published fiction and non-fiction books in 1980 – 1997



* Books = over 48 pages, small publications = 5-48 pages.

Source: Table 7.4

Indeed there is no reason why one sector of mass communication should have to suffer from expansion in another. This kind of zero-sum assumption would mean that the mass media in question shared the same methods of production and the same fields of consumption. This, however, is not the case with radio/television and literature (at least with several segments of non-fiction). For instance, reports published by research institutes and government agencies have a certain role to play in their operation, and it is hard to imagine radio and television, as we known them today, taking on that exact same role.

By contrast it is easy to see that non-fiction publishers may find various possibilities of growth and expansion in the modern mass media, in multimedia and in the World Wide Web. Multimedia technology provides access to a very graphic means of communication which allows for the simultaneous use of many different information formats. The World Wide Web, for its part, provides an instant and relatively inexpensive publishing channel. It is particularly well-suited to publishers for whom easy access and wide circulation are important considerations. In addition, even before electronic shopping becomes commonplace, the web also offers a convenient channel of distribution for non-profit organizations: for instance, many government reports are published on the net. In the category of professional literature the prospects for growth and expansion are further improved by the ready access in the workplace to computers and the Internet.

The growth of new media has not yet had any impact on the numbers of book titles published, however. The number of titles has dropped marginally during the past couple of years, but it remains to be seen whether this is just a blip or perhaps the beginning of a long-term trend. If parallel publishing (with the same publication published on paper and in electronic format) increases, it is unlikely that the number of books will decline very much.

There are various reasons for the growth of book publishing. Some of these reasons have to do with the changes that have happened in the publishing environment and in publishing philosophies. High visibility has become an increasingly important concern, at the same time it is also possible that the tendency towards management by results has caused mounting pressures in the publishing business: after all books are an easy and convenient result to measure. It is also possible that there have grown up new areas of expertise and new audiences, each with their own specific literature.

One important factor that has certainly affected all publishers is the development of DTP and image processing software, which has made the technical production of books much easier and far less expensive than before. All this has significantly lowered the threshold of book publishing.

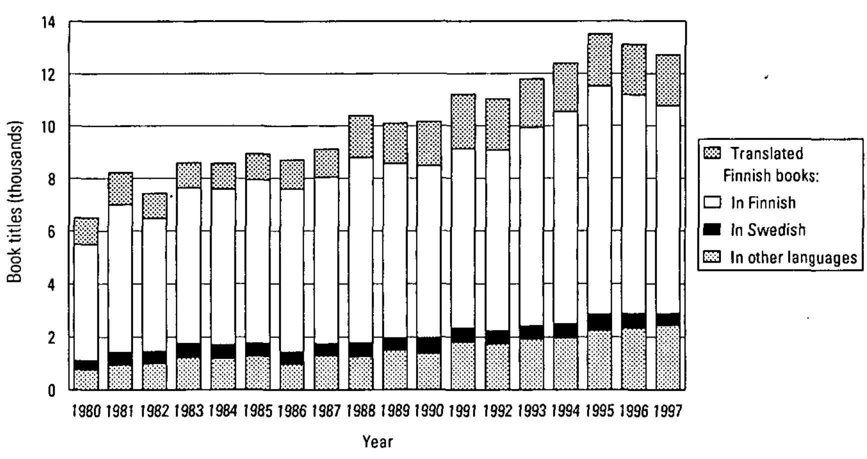
Around two-thirds of all books published in Finland are domestic literature in either Finnish or Swedish, the country's two official languages: in 1997 this category accounted for a total of 8 341 titles. The publication of translated literature increased sharply in the 1980s, but almost came to a halt at the beginning of the 1990s. In 1997, nearly 2 000 titles or about 15 per cent of all books published in Finland were translated from foreign languages. (Table 3 and Figure 2.)

The publishing of foreign language literature has increased dramatically. The number of titles published in foreign languages has grown much faster than the number of books published in Finnish or Swedish. In 1997 a total of 2 439 books were published in Finland that had a foreign title, which is 75 per cent more than in 1990 and three times as many as in 1980. This development is explained by the ongoing trends of internationalization, both in terms of publishers' operations and their orientation. (Table 3 and Figure 2.)

There have been no major changes in recent years in the breakdown of translated literature by source language. Well over half of all translations into Finnish are from the English language (Table 6). The second most common language of origin is Swedish. German and French books account for about six per cent of all translated literature. At least in the light of these statistics it seems that Finland's membership of the European Union has had no impact on the cultural orientation of book publishing in Finland.

As was pointed out above, only part of all books titles are published by publishing houses proper. The statistics of the central organization representing book publishers, the Finnish Book Publishers' Association (FBPA), provide a useful overview of member publishing operations (Tables 7–9). The members of the Association publish about half of the total annual volume of titles issued in Finland. In value and volume terms they have accounted for about 90 per cent of total sales.

Figure 7.2 Published Finnish, translated and foreign language books in 1980 – 1997



Souce: Table 7.3

Publishing houses publish roughly the same amount of fiction, non-fiction/major works, encyclopedic and reference books and school books. In volume terms, however, fiction has accounted for a slightly larger proportion of total sales than non-fiction and school books. Non-fiction accounts for a larger proportion of net revenues than fiction and school books, which is because non-fiction and especially major works are more expensive than other books. (Tables 7 and 8.)

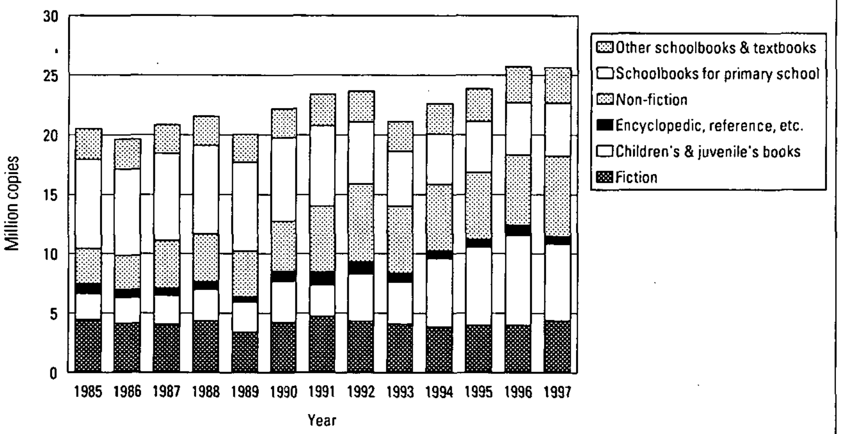
In 1997 the total turnover of book sales was FIM 2.3 billion. Bookshops accounted for just over one-third of total sales at retail prices. Direct sales by publishers was the second most important sales channel. (Table 2.)

There have been some changes in the sales channels of books since the late 1980s. The number of bookshops has decreased from 480 to 413 in 1996. The number of second-hand bookshops has also declined. (Table 10.)

Libraries

Finland has a very extensive network of public libraries. Public libraries have a total of around 1 200 outlets: main libraries, branch libraries, institutional libraries, mobile libraries and boat libraries. The number of outlets has decreased by about one-third since the beginning of the 1980s; in 1980 it still stood at about 1 800. (Table 13.)

Figure 7.3 Book sales by type of literature 1985 – 1997



Source: Table 7.8

The use of libraries is increasing all the time. In 1997 a total of 102 million items were borrowed, which is one-quarter more than at the beginning of the 1990s. Lending statistics clearly illustrate how the profile of libraries has been expanding from books towards other material: during the period between 1990 and 1997 the lending of other material (mainly phonograms and videos) has doubled to 21 million. At the same time the share of other material of all lending nearly doubled to 20 per cent. (Table 15.)

It is interesting to compare book lending through libraries with book sales by publishing houses. In 1997 a total of 81 million books were borrowed from public libraries, while members of the Finnish Book Publishers' Association sold around 26 million books. It has to be remembered, of course, that books which are bought by private persons also have more than one reader. (Tables 8 and 14.)

The increased use of libraries is partly explained by their growing clientele. In 1997 there were a total of 2.5 million borrowers, or some 300 000 more than at the beginning of the decade. The number of borrowers as a proportion of the population increased during the 1990s by almost five percentage points. By 1997, almost half of all people in Finland borrowed material from public libraries. However, the increased number of borrowers does not fully explain the increase in the number of items borrowed, because during 1990–1997 the number of lendings increased from 39 to 41 per borrower. (Table 15.)

The collections of public libraries have been growing, though not as quickly as in the first half of the 1990s. In 1997 the total number of titles in library collections amounted to 40 million. At the same time as the number of books acquired has slightly declined, the acquisition of other material has been slightly increasing. In volume terms, however, books still account for the majority of acquisitions. In 1997 public libraries acquired a total of 1.6 million copies of books and 0.3 million copies of other material. (Table 14.)

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. 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. The earlier division into general-interest publishers and smaller publishers is no longer applicable and has therefore been abandoned.

Other sources on book publishing and sales include Statistics Finland's industrial statistics, the sales statistics of wholesalers and retailers, as well as the yearbook on Finnish companies.

Statistical data on the operation of public libraries are compiled and published by the Cultural Department of the Ministry of Education. From 1993 onwards the amount of statistical data collected from libraries has been reduced. Data are currently compiled on the number of libraries, the amount of their book resources, their finances, and on borrowers as well as home loans.

Rauli Kohvakka

Figures

Tables

7.1 Value of book sales 1980 – 1997

Year	Value of sales FIM million	Fixed (1997) prices FIM million
1980	870	1 891
1985	1 340	1 935
1986	1 530	2 133
1987	1 710	2 300
1988	1 790	2 295
1989	1 960	2 358
1990	2 210	2 506
1991	2 130	2 320
1992	2 025	2 149
1993	1 930	2 005
1994	1 930	1 984
1995	2 030	2 067
1996	2 110	2 135
1997	2 325	2 325

Source: Statistics Finland

7.2 Marketing channels of books 1997

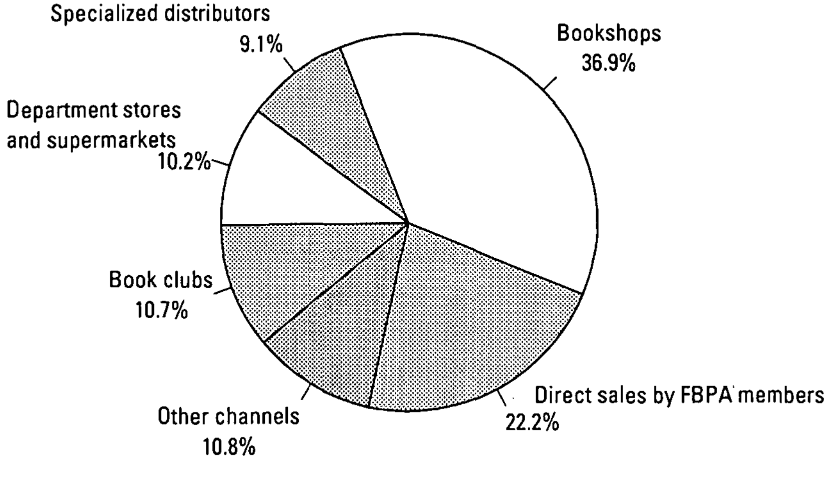
Marketing channel	FIM million	%
Bookshops	859	37
Department stores and supermarkets	237	10
Specialized distributors	212	9
Direct sales by FBPA members*	517	22
Book clubs	249	11
Other distribution channels	251	11
Total	2 325	100

Sales at consumer level including VAT.

* *Members of Finnish Book Publishers' Association*

Source: Statistics Finland

Figure 7.4 Marketing channels of books 1997



Total sales 2 325 FIM million

Source: Table 7.2

7.3 Finnish, translated and books in other languages published 1980 – 1997*

Year	FINNISH BOOKS					TRANSLATED BOOKS			TOTAL	
	Finnish language**	Swedish-language	Finnish and Swedish-language total	Other languages	TOTAL	Into Finnish	Into Swedish	TOTAL		Of which first editions
	No.									
1980	4 387	342	4 729	767	5 496	959	56	1 015	6 511	6 294
1985	6 181	474	6 655	1 280	7 935	906	89	995	8 930	8 358
1986	6 183	446	6 629	972	7 601	996	97	1 093	8 694	7 978
1987	6 320	450	6 770	1 287	8 057	971	78	1 049	9 106	8 397
1988	7 016	523	7 539	1 255	8 794	1 458	134	1 592	10 386	9 585
1989	6 615	463	7 078	1 492	8 570	1 420	107	1 527	10 097	9 365
1990	6 512	598	7 110	1 370	8 480	1 562	111	1 673	10 153	9 482
1991	6 784	525	7 309	1 811	9 120	1 976	112	2 088	11 208	10 439
1992	6 838	494	7 332	1 735	9 067	1 872	94	1 966	11 033	10 189
1993	7 538	479	8 017	1 927	9 944	1 725	116	1 841	11 785	10 980
1994	8 041	534	8 575	1 962	10 537	1 743	112	1 855	12 392	11 705
1995	8 669	605	9 274	2 254	11 528	1 857	109	1 966	13 494	12 723
1996	8 300	554	8 854	2 333	11 188	1 805	111	1 916	13 103	12 326
1997										
All	7 895	446	8 341	2 439	10 780	1 846	91	1 937	12 717	11 984
Books	6 066	335	6 401	1 668	8 069	1 371	64	1 435	9 504	..
Small publications	1 829	111	1 940	771	2 711	475	27	502	3 213	..
	%									
1980	67.4	5.3	72.6	11.8	84.4	14.7	0.9	15.6	100	96.7
1985	69.2	5.3	74.5	14.3	88.9	10.1	1.0	11.1	100	93.6
1986	71.1	5.1	76.2	11.2	87.4	11.5	1.1	12.6	100	91.8
1987	69.4	4.9	74.3	14.1	88.5	10.7	0.9	11.5	100	92.2
1988	67.6	5.0	72.6	12.1	84.7	14.0	1.3	15.3	100	92.3
1989	65.5	4.6	70.1	14.8	84.9	14.1	1.1	15.1	100	92.8
1990	64.1	5.9	70.0	13.5	83.5	15.4	1.1	16.5	100	93.4
1991	60.5	4.7	65.2	16.2	81.4	17.6	1.0	18.6	100	93.1
1992	62.0	4.5	66.5	15.7	82.2	17.0	0.9	17.8	100	92.4
1993	64.0	4.1	68.0	16.4	84.4	14.6	1.0	15.6	100	93.2
1994	64.9	4.3	69.2	15.8	85.0	14.1	0.9	15.0	100	94.5
1995	64.2	4.5	68.7	16.7	85.4	13.8	0.8	14.6	100	94.3
1996	63.3	4.2	67.6	17.8	85.4	13.8	0.8	14.6	100	94.1
1997										
All	62.1	3.5	65.6	19.2	84.8	14.5	0.7	15.2	100	94.2
Books	63.8	3.5	67.4	17.6	84.9	14.4	0.7	15.1	100	..
Small publications	56.9	3.5	60.4	24.0	84.4	14.8	0.8	15.6	100	..

* *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.*

Source: Helsinki University Library, Bibliographical department

7.4 Non– fiction, fiction, schoolbooks and chidren's books: total number of titles 1980 – 1997*

Year	Non-fiction		Fiction**		Total		Schoolbooks		Children's books	
	No.	%	No.	%	No.	%	No.	%	No.	%
Small publications (5–48 pages)										
1980	1 446	92.3	120	7.7	1 566	100.0	75	4.8	115	7.3
1985	2 051	93.7	137	6.3	2 188	100.0	57	2.6	108	4.9
1990 ***	2 241	87.7	314	12.3	2 659	100.0	57	2.1	379	14.3
1991	2 581	87.6	366	12.4	2 947	100.0	49	1.7	497	16.9
1992	2 405	85.7	400	14.3	2 805	100.0	36	1.3	496	17.7
1993	2 713	88.5	352	11.5	3 065	100.0	34	1.1	439	14.3
1994	2 671	87.3	390	12.7	3 061	100.0	33	1.1	429	14.0
1995	3 083	88.5	400	11.5	3 483	100.0	44	1.3	456	13.1
1996	3 062	89.2	371	10.8	3 433	100.0	62	1.8	502	14.6
1997	2 870	89.3	346	10.8	3 213	100.0	52	1.6	456	14.2
Books (more than 48 pages)										
1980	4 144	83.8	801	16.2	4 945	100.0	456	9.2	113	2.3
1985	5 796	86.0	946	14.0	6 742	100.0	635	9.4	182	2.7
1990 ***	5 910	81.6	1 334	18.4	7 494	100.0	558	7.4	280	3.7
1991	6 704	81.2	1 557	18.8	8 261	100.0	541	6.5	396	4.8
1992	6 867	83.5	1 361	16.5	8 228	100.0	462	5.6	367	4.5
1993	7 395	84.8	1 325	15.2	8 720	100.0	365	4.2	344	3.9
1994	8 064	85.1	1 414	14.9	9 478	100.0	461	4.9	364	3.8
1995	8 529	85.2	1 482	14.8	10 011	100.0	508	5.1	381	3.8
1996	8 208	84.9	1 463	15.1	9 671	100.0	450	4.7	341	3.5
1997	8 075	85.0	1 429	15.0	9 504	100.0	303	3.2	326	3.4
Total										
1980	5 590	85.9	921	14.1	6 511	100.0	531	8.2	228	3.5
1985	7 847	87.9	1 083	12.1	8 930	100.0	692	7.7	290	3.2
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	9 272	84.0	1 761	16.0	11 033	100.0	498	4.5	863	7.8
1993	10 108	85.8	1 677	14.2	11 785	100.0	399	3.4	783	6.6
1994	10 735	85.6	1 804	14.4	12 539	100.0	494	3.9	793	6.3
1995	11 612	86.0	1 884	14.0	13 496	100.0	552	4.1	837	6.2
1996	11 270	86.0	1 834	14.0	13 104	100.0	512	3.9	843	6.4
1997	10 942	86.0	1 775	14.0	12 717	100.0	355	2.8	782	6.1

* *Based on the data national bibliography as classifield by subject under Finnish literature.*
Statistics drawn up on the basis of Unesco recommendations, see Unesco statistical yearbook.

** *Fiction includes prose, children's books, juvenile books and poetry.*

*** *In 1990 information on type of literature was missing for 250 books and 104 small publications. However, they are included in the total, but the percentage share is based on titles for which information on type of literature was available*

Sources: Helsinki University Library, Bibliographical department.

7.5 Total number of books published under different categories 1980 – 1997*

Category	1980	1985	1990	1991	1992	1993	1994	1995	1996
	No. of titles								
General interest	297	329	307	335	291	319	320	315	325
Philosophy, psychology	165	191	165	189	181	245	230	266	240
Religion	365	360	286	339	456	319	341	390	355
Sociology, statistics	212	233	176	219	208	230	236	234	245
Politics, national economy	564	795	776	943	888	874	996	1 026	971
Law, public administration	447	625	735	813	816	895	956	952	938
Warfare, military science	69	61	68	94	61	92	111	108	109
Education	381	533	539	617	551	656	660	975	828
Ethnology, folklore	76	98	65	80	79	115	107	90	98
Linguistics	264	347	219	394	403	346	405	438	411
Mathematics	180	257	840	241	184	207	221	239	288
Natural sciences	507	683	422	905	896	901	988	973	927
Medicine	351	415	1 041	524	558	615	588	669	746
Engineering, technology, industry	614	1 053	297	1 113	1 204	1 398	1 306	1 477	1 376
Agriculture and forestry	204	433	117	374	351	389	399	460	465
Household management	83	121	453	111	135	155	145	137	157
Business economics, transport	217	403	544	538	526	639	729	794	733
Architecture, art	198	330	115	625	628	664	665	719	681
Games, sport	54	98	368	129	133	130	163	151	126
History of literature	35	46	59	56	55	61	57	65	64
Literature	921	1 083	1 648	1 923	1 761	1 677	1 804	1 882	1 834
Geography, travel	79	111	87	110	130	105	109	91	105
History, biographies	228	325	472	536	538	753	1 003	1 043	1 082
Unclassified**	–	–	354	–	–	–	–	–	–
Total	6 511	8 930	10 153	11 208	11 033	11 785	12 539	13 494	13 104

* *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

7.5 Continued

Category	1997 Small publications (5 – 48 pages)	Books (over 48 pages)	Total	Of which Finnish-language	Swedish-language	Other language
	No. of titles					
General interest	86	230	316	258	21	37
Philosophy, psychology	14	234	248	224	6	18
Religion	41	272	313	276	16	21
Sociology, statistics	59	226	285	216	14	55
Politics, national economy	330	647	977	668	41	268
Law, public administration	270	722	992	854	49	89
Warfare, military science	12	85	97	87	5	5
Education	293	447	740	572	75	93
Ethnology, folklore	10	75	85	65	8	12
Linguistics	25	291	316	164	29	123
Mathematics	136	123	259	112	5	142
Natural sciences	279	645	924	498	17	409
Medicine	158	580	738	451	15	272
Engineering, technology, industry	446	1 055	1 501	1 050	25	426
Agriculture and forestry	153	288	441	347	17	77
Household management	40	128	168	153	3	12
Business economics, transport	169	537	706	530	23	153
Architecture, art	179	460	639	555	30	54
Games, sport	31	122	153	139	8	6
History of literature	1	75	76	52	6	18
Literature	346	1 429	1 775	1 704	59	12
Geography, travel	5	97	102	88	4	10
History, biographies	130	736	866	678	61	127
Unclassified**	–	–	–	–	–	–
Total	3 213	9 504	12 717	9 741	537	2 439

7.6 Translated books published 1980 – 1997 by source language

Source language	1980 No.	%	1985 No.	%	1990 No.	%	1991 No.	%	1992 No.	%
Translations into Finnish										
English	447	46.6	520	57.4	940	60.1	1 277	64.6	1 138	60.8
Swedish	167	17.4	124	13.7	184	11.8	198	10.0	222	11.9
German	84	8.8	96	10.6	128	8.2	161	8.1	146	7.8
French	48	5.0	43	4.7	92	5.9	104	5.3	119	6.4
Danish	21	2.2	10	1.1	30	1.9	18	0.9	26	1.4
Russian	47	4.9	26	2.9	40	2.6	36	1.8	24	1.3
Norvegian	26	2.7	22	2.4	34	2.2	35	1.8	18	1.0
Italian	16	1.7	11	1.2	28	1.8	35	1.8	62	3.3
Spanish	3	0.3	6	0.7	20	1.3	26	1.3	21	1.1
Others*	100	10.4	48	5.3	67	4.3	86	4.4	96	5.1
Total	**959**	**100.0**	**906**	**100.0**	**1 563**	**100.0**	**1 976**	**100.0**	**1 872**	**100.0**
Translations into Swedish										
Finnish	51	91.1	86	96.6	103	92.8	101	90.2	82	87.2
English	1	1.8	2	2.2	2	1.8	4	3.6	8	8.5
Others*	4	7.1	1	1.1	6	5.4	7	6.3	4	4.3
Total	**56**	**100.0**	**89**	**100.0**	**111**	**100.0**	**112**	**100.0**	**94**	**100.0**

7.6 Continued

Source language	1993 No.	%	1994 No.	%	1995 No.	%	1996 No.	%	1997 All No.	%	Books (over 48 pages) No.	%	Small publications (5 – 48 pages) No.	%
Translations into Finnish														
English	1 057	61.3	1 041	59.7	1 196	64.4	1 178	65.3	1 249	67.6	947	75.8	302	24.2
Swedish	189	11.0	234	13.4	213	11.5	222	12.3	223	12.1	176	78.9	47	21.1
German	136	7.9	131	7.5	135	7.3	108	6.0	102	5.5	55	53.9	47	46.1
French	123	7.1	127	7.3	105	5.7	105	5.8	93	5.0	48	51.6	45	48.4
Danish	19	1.1	29	1.7	29	1.6	25	1.4	17	0.9	13	76.5	4	23.5
Russian	18	1.0	22	1.3	20	1.1	24	1.3	21	1.1	21	100.0	0	0.0
Norvegian	14	0.8	16	0.9	22	1.2	15	0.8	16	0.9	16	100.0	0	0.0
Italian	46	2.7	39	2.2	40	2.2	35	1.9	43	2.3	28	65.1	15	34.9
Spanish	16	0.9	13	0.7	16	0.9	17	0.9	19	1.0	14	73.7	5	26.3
Others*	107	6.2	91	5.2	81	4.4	76	4.2	64	3.5	54	84.4	10	15.6
Total	**1 725**	**100.0**	**1 743**	**100.0**	**1 857**	**100.0**	**1 805**	**100.0**	**1 847**	**100.0**	**1 372**	**74.3**	**475**	**25.7**
Translations into Swedish														
Finnish	104	89.7	95	84.8	105	96.3	104	93.7	85	93.4	58	68.2	27	31.8
English	5	4.3	4	3.6	1	0.9	2	1.8	2	2.2	2	100.0	0	0.0
Others*	7	6.0	13	11.6	3	2.8	5	4.5	4	4.4	4	100.0	0	0.0
Total	**116**	**100.0**	**112**	**100.0**	**109**	**100.0**	**111**	**100.0**	**91**	**100.0**	**64**	**70.3**	**27**	**29.7**

* *Includes translations from several languages.*

Source: Helsinki University Library, Bibliographical department

7.7 Titles produced 1985 – 1997 by type of literature*

Type of literature	1985		1990		1991		1992		1993	
	No.	%	No.	%	No.	%	No.	%	No.	%
Finnish fiction										
Prose	392	7.9	365	6.0	383	6.8	319	6.1	312	6.2
Children's books	141	2.8	164	2.7	157	2.8	168	3.2	128	2.5
Juvenile books	83	1.7	118	2.0	134	2.4	97	1.8	85	1.7
Translated fiction										
Prose	471	9.4	621	10.3	480	8.5	525	10.0	486	9.6
Children's books	362	7.3	415	6.9	449	7.9	389	7.4	418	8.3
Juvenile books	125	2.5	140	2.3	140	2.5	120	2.3	149	2.9
				0.0						
Poetry, plays	95	1.9	148	2.5	114	2.0	103	2.0	85	1.7
Non-fiction	1 371	27.5	1 832	30.4	1 653	29.2	1 655	31.4	1 673	33.1
Encyclopedic, reference	52	1.0	138	2.3	160	2.8	140	2.7	153	3.0
Schoolbooks for primary school	1 063	21.3	1 049	17.4	1 102	19.4	795	15.1	756	14.9
Other schoolbooks	834	16.7	1 044	17.3	897	15.8	954	18.1	813	16.1
Total	4 989	100.0	6 034	100.0	5 669	100.0	5 265	100.0	5 058	100.0
Proportion of new titles as % of total production	53.2		51.6		52.2		54.6		54.4	

7.7 Continued

Type of literature	1994		1995		1996		1997	
	No.	%	No.	%	No.	%	No.	%
Finnish fiction								
Prose	391	6.8	415	6.5	397	5.9	393	5.9
Children's books	113	2.0	139	2.2	136	2.0	140	2.1
Juvenile books	97	1.7	109	1.7	132	2.0	83	1.2
Translated fiction								
Prose	498	8.7	520	8.2	563	8.4	635	9.5
Children's books	438	7.7	595	9.4	747	11.2	743	11.2
Juvenile books	148	2.6	122	1.9	83	1.2	133	2.0
Poetry, plays	154	2.7	157	2.5	156	2.3	164	2.5
Non-fiction	1 819	31.8	1 960	30.9	1 975	29.5	1 999	30.1
Encyclopedic, reference	182	3.2	143	2.3	130	1.9	93	1.4
Schoolbooks for primary school	941	16.5	1 014	16.0	1 165	17.4	1 055	15.9
Other schoolbooks	931	16.3	1 170	18.4	1 206	18.0	1 214	18.3
Total	5 712	100.0	6 344	100.0	6 690	100.0	6 652**	100.0
Proportion of new titles as % of total production	52.8		53.6		53.8		54.3	

* *Titles produced by members of the Finnish Book Publishers' Assosiation. The figures for different years are not fully comparable as the number of respondents has varied from year to year. In 1997 responses came in from 76 members.*

** *Of which 3 611 titles were first editions and 3 041 reprints.*

Source: The Finnish Book Publishers' Association

7.8 Book sales by type of literature 1980 – 1997*

Type of literature	1980		1985		1990		1991		1992	
	thousand copies	%	thousand copies	%	thousand copies	%	thousand copies	%	thousand copies	%
Fiction	3 039	13.1	4 429	21.6	4 247	17.0	4 729	20.2	4 328	18.0
Children's and juveline books	3 630	15.7	2 194	10.7	3 430	13.7	2 632	11.2	3 970	16.5
Major works	3 718	16.0	841	4.1	865	3.5	1 124	4.8	1 045	4.3
Encyclopedic reference, etc.			2 986	14.6	4 212	16.9	5 532	23.6	6 517	27.1
Schoolbooks for primary school	9 193	39.6	7 482	36.5	7 006	28.0	6 764	28.9	5 243	21.8
Other schoolbooks and textbooks	2 404	10.4	2 559	12.5	2 423	9.7	2 613	11.2	2 549	10.6
Others	1 209	5.2	–	–	2 796	11.2	29	0.1	388	1.6
Total	23 193	100.0	20 491	100.0	24 980	100.0	23 423	100.0	24 040	100.0

7.8 Continued

Type of literature	1993		1994		1995		1996		1997	
	thousand copies	%	thousand copies	%	thousand copies	%	thousand copies	%	thousand copies	%
Fiction	4 090	19.2	3 861	17.1	3 987	16.7	4 342	16.5	4 384	17.1
Children's and juveline books	3 545	16.6	5 755	25.4	6 571	27.5	7 574	28.8	6 459	25.2
Major works	750	3.5	639	2.8	670	2.8	890	3.4	653	2.5
Encyclopedic reference, etc.	5 639	26.4	5 614	24.8	5 608	23.5	5 891	22.4	6 726	26.2
Schoolbooks for primary school	4 599	21.6	4 215	18.6	4 287	18.0	4 410	16.8	4 457	17.4
Other schoolbooks and textbooks	2 499	11.7	2 540	11.2	2 743	11.5	3 010	11.5	2 978	11.6
Others	201	0.9	–	–	–	–	168	0.6	3	0.0
Total	21 323	100.0	22 624	100.0	23 866	100.0	26 285	100.0	25 660	100.0

* *Sales reported by members of the Finnish Book Publishers' Assosiation. The figures for different years are not fully comparable as the number of respondents has varied from year to year. In 1997 responses came in from 78 members.*

Source: The Finnish Book Publishers' Association

7.9 Value of book sales by type of literature 1980 – 1997*

Type of literature	1980 FIM million	%	1985 FIM million	%	1990 FIM million	%	1991 FIM million	%	1992 FIM million	%	1993 FIM million	%
Fiction	70	13.8	151	19.3	197	16.4	200	16.3	190	15.3	179	15.4
Children's and juvenile books	35	6.9	45	5.8	77	6.4	72	5.9	79	6.4	71	6.1
Major works	184	36.4	122	15.6	175	14.6	206	16.7	223	17.9	173	14.8
Encyclopedic reference, etc.			158	20.2	290	24.2	372	30.2	407	32.7	427	36.7
Schoolbooks for primary school	119	23.5	179	22.9	230	19.2	244	19.8	205	16.5	181	15.5
Other schoolbooks and textbooks	43	8.5	85	10.9	113	9.4	132	10.7	140	11.3	134	11.5
Others	56	11.1	41	5.2	119	9.9	–	–	–	–	–	–
Total	*506*	*100.0*	*781*	*100.0*	*1 200*	*100.0*	*1 230*	*100.0*	*1 244*	*100.0*	*1 165*	*100.0*

7.9 Continued

Type of literature	1994 FIM million	%	1995 FIM million	%	1996 FIM million	%	1997 a)** FIM million	%	1997 b)*** FIM million	%
Fiction	186	14.5	222	16.4	226	16.0	159	16.6	40	8.5
Children's and juvenile books	149	11.6	164	12.1	160	11.3	131	13.7	13	2.8
Major works	149	11.6	151	11.1	137	9.7	8	0.8	116	24.6
Encyclopedic reference, etc.	463	36.1	447	32.9	458	32.4	259	27.1	248	52.7
Schoolbooks for primary school	181	14.1	196	14.4	218	15.4	223	23.3	6	1.3
Other schoolbooks and textbooks	155	12.1	177	13.0	195	13.8	162	16.9	41	8.7
Others	–	–	–	–	20	1.4	14	1.5	7	1.5
Total	1 283	100.0	1 357	100.0	1 415	100.0	956	100.0	471	100.0

* *Sales reported by 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 1997 responses came in from 78 members.*

** *Includes publisher's sales to distribution and retail level (book shops, wholesale dealers, department stores, book clubs, etc.) at wholesale price.*

*** *Inclues publisher's direct sales to customers at retail price, except those of book clubs.*

Source: The Finnish Book Publishers' Association

7.10 Number of bookshops, Rautakirja kiosks and second–hand bookshops 1980 – 1996

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
1992	431	785	220
1993	413	763	200
1994	406	750	192
1995	402	759	189
1996	393	752	195

* *In addition, there are a lot of book sections (linked to stationery sections) in the department stores of the central distributors. The number and scope of the book sections may vary considerably.*

** *In 1988 the way in which the statistics on Rautakirja kiosks are compiled changed; the total number of Rautakirja kiosks no longer includes other stores (such as video centres).*

Sources: Rautakirja Oy; Statistic Finland Business Register.

7.11 Book clubs 1998

Book club	Established	Owner	Members 1997	Sales FIM million 1997
Suuri Suomalainen Kirjakerho	1969	Otava	242 000	126
Uudet kirjat	1980	WSOY	100 000	46
Ex Libris	1998	Tammi (Bonnier Media) 60% Gummerus 40%	..	..
Akateeminen Kotikirjasto	1998	Gummerus	..	..
Kirjavaliot	1976	Valitut Palat – Reader´s Digest	..	..
Johanna	1971	WSOY	50 000	20
Lasten Parhaat Kirjat	1987	Tammi/Bonnier Media	40 000*	19
Lasten Oma Kirjakerho	1975	Helsinki Media	47 000	..
Merkurius Tietokerho	1995	Helsinki Media	17 000	..
Barbie Kirjakerho	1995	Helsinki Media	14 000	..

* *Data from 1996.*

Source: Company annual reports and other company data

7.12 Biggest book publishers: net sales 1997

Publisher	Net sales of books FIM million	Book sales/turnover %
WSOY	543	48
Otava	238	32
Valitut Palat – Reader´s Digest	155	38
Tammi (Bonnier Media)	95	90
Helsinki Media	91	8
Gummerus	77	40

Net sales at distributor level without VAT.

Sources: Company annual reports and other company sources

Processed

7.13 Main libraries, branch libraries, institutional libraries and mobile libraries 1980 – 1997

Year	Main libraries	Branch libraries	Institutional libraries	Total	Mobile libraries
1980	464	1 144		1 608	219
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
1993	..	..	..	1 025	222
1994	..	..	..	998	220
1995	..	..	..	985	215
1996	439	437	130	1 006	214
1997	436	429	127	992	210

* *The province of Åland not included in the statistics from 1990 onwards.*

Source: National Board of General Education/Ministry of Education

7.14 Collections and acquisitions of public libraries 1985 – 1997*

Year	Collections **			Acquisitions		
	Books	Other material	Total	Books	Other material	Total
	'000					
1985	30.469	689	31 548	2 434	142	2 576
1986	30 330	963	31 293	2 404	178	2 582
1987	33 003	1 167	34 170	2 457	170	2 626
1988	34 106	1 322	35 428	2 383	186	2 569
1989	34 902	1 488	36 390	2 329	212	2 541
1990	35 502	1 677	37 179	2 318	238	2 556
1991	35 938	1 846	37 784	2 056	228	2 285
1992	36 308	2 023	38 331	1 808	218	2 026
1993	36 611	2 582	39 193	1 686	257	1 943
1994	36 629	3 029	39 658	1 596	251	1 847
1995	36 882	3 119	40 001	1 584	256	1 840
1996	36 835	3 242	39 998	1 593	277	1 871
1997	36 832	3 186	40 018	1 636	284	1 920

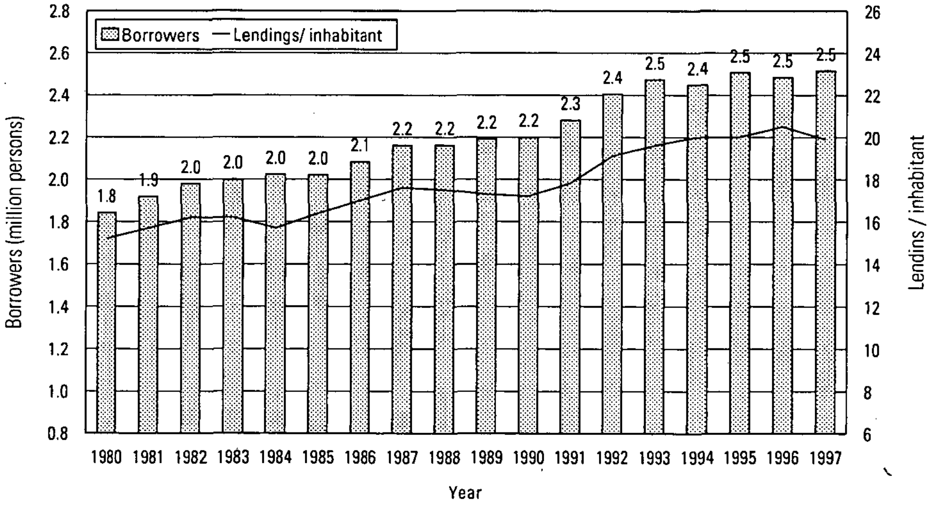
* *From 1990 onwards the province of Åland not included.*

** *At the end of year.*

Source: Ministry of Education: Libraries

Processed

Figure 7.5 Number of library borrowers and lendings per inhabitant 1980-- 1997



Source: Table 7.15

7.15 Public library borrowers and lendings 1985 – 1997*

Year	Borrowers '000 persons	% of the population	Lendings Of which Book lendings '000	Other material	Received inter library loans **	Total	Per inhabitant	Per borrower
1985	2 021	41.2	78 226	2 115	93.0	80 434	16.4	39.8
1986	2 084	42.4	80 555	3 023	94.0	83 672	17.0	40.1
1987	2 162	43.8	80 389	6 598	95.9	87 082	17.7	40.3
1988	2 162	43.7	78 669	7 912	107.0	86 688	17.5	40.1
1989	2 191	44.1	76 710	9 279	117.9	86 107	17.3	39.3
1990	2 199	44.1	75 085	10 630	131.2	85 845	17.2	39.0
1991	2 281	45.5	76 023	13 217	152.5	89 392	17.8	39.2
1992	2 405	47.7	80 806	15 582	164.4	96 552	19.1	40.2
1993	2 473	48.8	82 228	16 693	154.6	99 075	19.6	40.1
1994	2 488	48.9	84 066	17 792	152.1	102 010	20.0	41.0
1995	2 507	49.1	81 634	20 264	165.7	102 064	20.0	40.7
1996	2 484	48.4	82 892	21 277	191.2	104 408	20.3	42.0
1997	2 516	48.9	81 011	21 128	188.3	102 327	19.9	40.7

* *From 1990 onwards the province of Åland not included*

** *Includes books and other material loaned from other libraries.*

Source: Ministry of Education

Processed

7.16 Public libraries: materials expenses and book acquisitions 1980 – 1997

Year	No. of books purchases '000 copies	Book acquisition costs FIM million	Materials acquisition costs total 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
1993	1 686	150.5	..
1994	1 596	138.6	..
1995	1 584	134.6	..
1996	1 593	136.0	193.6
1997	1 636	140.0	203.2

Source: Ministry of Education

7.17 Book readership 1992 – 1998

	Has read during the previous day		
	Books	Fiction	Non-fiction
	%	%	%
1992 All	36	21	20
1994 All	34	22	19
1996 All	32	20	16
1998 All	34	22	18
1998			
Women	39	28	19
Men	28	17	17
Age			
15 – 24	42	17	35
25 – 44	30	19	14
45 – 59	35	29	15
60 –	31	27	10

	Reading time minutes/day
1992 All	25
1994 All	28
1996 All	23
1998 All	26

Source: MDC Helsinki Group-Media Research Ltd.

8 Newspapers

Finland has an exceptionally strong newspaper sector: the number of newspaper titles, circulation figures and coverages are all at a very high level. Newspapers and local papers represent approximately 30 per cent of the total turnover of the mass media in Finland and over half of advertising through the mass media.

In 1998 a total of 220 newspapers were published in Finland. Following international practice, Finnish newspapers are classified into two categories, viz. dailies and other newspapers. This distinction is based on the frequency of publication. (Tables 2–4.)

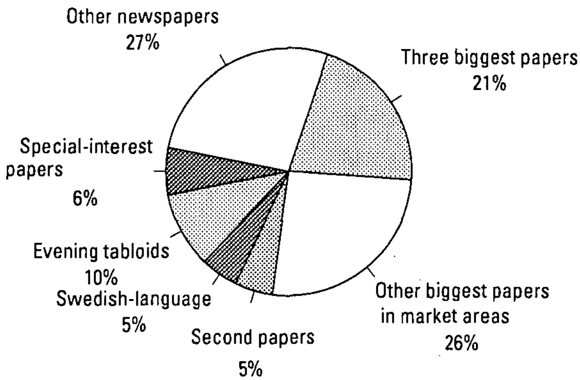
Dailies appearing 4–7 times a week (which are comparatively few in number) have a high average circulation. In 1998, the number of dailies published in Finland was 56, which had an average circulation of around 42 000 copies. Dailies are typically the biggest papers in the region where they are published. Afternoon and evening tabloids 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 high, but in terms of circulation they tend to be rather small. In 1998 there were 164 papers in this category, with an average circulation of just over 6 000 copies. The biggest single subcategory in this group is represented by so-called local papers, which cover a small circulation area and 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 have remained more or less unchanged since the early 1980s. The number of dailies as a proportion of all newspaper titles has been around one-quarter, but in terms of circulation they very much dominate the field. In 1998, their combined circulation accounted for over two-thirds or 70 per cent of the total newspaper circulation. Dailies appearing seven times a week alone accounted for around half 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 been two clear changes in the structure of the Finnish press compared with the early 1980s. (Table 5 & Figure 1.)

Figure 8.1 Circulation of newspapers by type of paper 1997



Source: Table 8.5

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 the early 1990s 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 about one-third the level of the early 1980s.

The other significant change has been the marked increase in the market share of afternoon tabloids. The competition between Ilta-Sanomat and Iltalehti (which was launched in 1980) has served to increase the circulations of both papers. Their share of the total newspaper circulation (around 10%) has increased more than 2.5-fold compared to the situation in the early 1980s. (Table 5.)

Afternoon papers are sold on a single-copy basis. Today over 95 per cent of the single-copy sales of Finnish newspapers consist of the sale of afternoon papers (Table 18). In international comparison single-copy sales of other newspapers (both Finnish and foreign) is at an exceptionally low level in Finland. Indeed subscriptions account for the bulk of total sales of both newspapers and magazines in Finland. Around 90 per cent of all newspapers sold are delivered direct to subscribers (Table 10.)

Newspapers are still the most significant force in the Finnish mass media in terms of economic volume, even though the economic recession that hit the country in the early 1990s significantly reduced their advertising revenue. In 1997 the turnover of Finnish newspapers was approximately FIM 5.6 billion. (Table 1.) Newspapers continue to account for a very large part, about 30 per cent of the media industry's turnover in Finland. During the 1990s this figure has dropped by no more than a couple of percentage points, which is a fairly modest decrease compared to the quite dramatic changes in newspapers' sources of income and circulation numbers. Today advertising accounts for no more than just over half (53%) of the total revenue of newspapers, while the figure in the late 1980s was still in excess of 70 per cent (including all classified advertisements). During the 1990s the combined circulation of all newspapers has declined by 18 per cent or some 750 000 copies from 4.1 million to 3.3 million (Table 3). Discontinued papers account for less than 100 000 copies of this figure. In 1997 the decline in the circulation of dailies seemed to bottom out, but continued for newspapers appearing less frequently.

One of the major factors behind the declining circulation numbers was obviously the sharp increase in unemployment levels in the early 1990s, which gave rise to considerable economic hardship. However, part of the explanation lies in the conscious steps taken by the newspapers themselves. For example, in the late 1980s some major regional dailies went out of their way to expand their circulation areas, sparing no expense either in covering a larger news area or in distributing the paper – sometimes in campaigns which did not even cover the costs of distribution. With the onset of recession, these ambitions of expansion had to be put on ice. For some papers then, the decrease in circulation numbers has actually been conducive to a healthier financial structure.

Newspapers continue to command a large share of total media advertising in Finland, even though that share has dropped by around 10 percentage points during the 1990s. Even so newspapers still account for over 50 per cent of total media advertising in Finland, while the average for Western European countries in 1996 was 40 per cent. (Table 4 in Chapter 1 & Table 2 in Chapter 12.)

The biggest single expense item for dailies in Finland is technical production (31%). Editorial work accounts for roughly one-quarter of the expenses. (Table 11.)

As a result of numerous company takeovers and mergers, the market shares of the biggest newspaper companies (measured in terms of circulations) have increased. (Figure 5; Tables 12 & 13.) Since the mid-1980s, for instance, the share of the combined circulation of the four biggest companies has increased from 31 to 48 per cent, that of the eight biggest companies from 43 to 61 per cent. The biggest shifts in these figures have occurred in 1986–1988 and from 1994 onwards. During the latter half of the 1980s some major national dailies (including Uusi Suomi, Iltalehti and Kauppalehti) were taken over by Tampereen Kirjapaino/Aamulehti Group. Today, Aamulehti Group is part of Alma Media, Finland's second biggest media company after Sanoma - WSOY. During the 1990s Alma Media has gained control of a number of regional newspapers. It also owns an extensive chain of local newspapers. Other significant ownership changes during the 1990s include the expansion of a major regional newspaper chain in south-eastern Finland (Kymen Lehtimedia, which was completely taken over by Sanoma - WSOY in spring 1999) and the formation of another major regional chain in central Finland (Keski-Suomen Media, where Sanoma - WSOY holds 22 per cent of the shares). Sweden's leading newspaper publisher Bonnier is now the biggest shareholder (21%) in Alma Media, which was formed in spring 1998 with the merger of Aamulehti Group and the leading commercial television company MTV3 Finland.

The growth of newspaper chains is a trend which may be expected to continue at both the national and Scandinavian level. For instance, Norway's biggest newspaper publisher Schibsted has in recent years acquired significant shareholdings in Swedish papers, and in late 1998 Sanoma-WSOY became a major shareholder (21 %) in A-pressen, Norway's second-biggest newspaper chain.

There has also been a trend towards closer editorial and marketing cooperation between newspaper companies both within chains and between independent papers. One of the forms of editorial cooperation is the publication of joint TV magazines, Sunday pages and special supplements. Taking a bird's-eye view, this kind of cooperation will probably lead to a further homogenization of the contents of newspapers. However, the net result for readers of papers with limited resources is probably positive: they can look forward to a more varied content in their own newspaper. Indeed it is unlikely that the average reader is overly concerned by the trends of homogenization because there are only relatively few people who read more than one regional paper.

In 1996 editorial material took up about 70 per cent of total registered space in Finnish newspapers; the remaining 30 per cent was taken up by advertising material. The three major categories of editorial material in 1996 were domestic material (32%), sport (15%) and entertainment (14%). (Table 14.)

The number and economic volume of free sheets increased sharply during the early 1980s, but growth slowed down after the mid-1980s. The number of free sheets distributed to households declined very sharply during the recession. In recent years the leading free sheets in towns have been merging into chains, and a completely new phenomenon in Helsinki was the launch in 1997 of a daily free newspaper for commuters and pedestrians, based on the concept of Metro that has been highly successful in the Swedish capital of Stockholm. The leading publisher on the Finnish free sheet market is Janton. The latest comprehensive survey of free sheets was conducted in 1994, when a total of 106 free sheets were published in Finland, with a total print of 3.5 million copies. (Table 21.)

Statistical sources

Circulation statistics for newspapersas well as readership figures are based on statistics compiled by the Finnish Audit Bureau of Media.

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 annual statistics compiled by Posts and Telecommunications (as from the beginning of 1994 Finland Post Ltd) contain data on the number of newspapers delivered by the post office. The data on the single-copy sales of Finnish and foreign newspapers are from the Annual Reports of Rautakirja Oy, which dominates the wholesale distribution of single copies of newspapers and magazines in Finland.

The Intermedia surveys published every other year by MDC Media Research Ltd contain information on the reading of newspapers and changes in reading patterns.

Tuomo Sauri

Figures

Tables

8.1 Turnover of newspapers 1980 – 1997

	Current prices			Fixed (1997) prices		
	Dailies	Other newspapers	Total	Dailies	Other newspapers	Total
	FIM million	FIM million	FIM million	FIM million	FIM million	FIM million
1980	1 467	225	1 692	3 189	489	3 678
1985	2 920	460	3 380	4 216	664	4 881
1986	3 155	510	3 665	4 398	711	5 109
1987	3 405	575	3 980	4 580	773	5 353
1988	3 820	645	4 465	4 897	827	5 724
1989	4 350	640	4 990	5 233	770	6 003
1990	4 450	680	5 130	5 046	771	5 817
1991	4 115	690	4 805	4 481	751	5 233
1992	4 090	630	4 720	4 339	668	5 008
1993	3 980	610	4 590	4 135	634	4 769
1994	4 370	615	4 985	4 492	632	5 125
1995	4 650	620	5 270	4 734	631	5 365
1996	4 725	635	5 360	4 782	643	5 424
1997	4 940	615	5 555	4 940	615	5 555

Source: Finnish Newspapers Association
Statistics Finland

Processed

8.2 Number of newspaper titles 1980 – 1998

Year	Dailies (7–4 issues/week)	Non–dailies (3–1 issues/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	181	237
1994	56	179	235
1995	56	175	231
1996	56	170	226
1997	56	167	223
1998	56	164	220

Sources: Annual reports of the Finnish Newspapers Association FNPA 1980 -.
The Finnish Audit Bureau of Circulations

Processed

8.3 Total circulation of newspapers 1980 – 1998

		Dailies (7–4 issues/week)	Non-dailies (3–1 issues/week)	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)	2 579	1 287	3 866
	%	*66.8*	*33.3*	*100.0*
1993	circulation (thousand)	2 484	1 196	3 680
	%	*67.5*	*32.5*	*100.0*
1994	circulation (thousand)	2 400	1 136	3 536
	%	*67.9*	*32.1*	*100.0*
1995	circulation (thousand)	2 368	1 075	3 443
	%	*68.8*	*31.2*	*100.0*
1996	circulation (thousand)	2 332	1 060	3 391
	%	*68.8*	*31.2*	*100.0*
1997	circulation (thousand)	2 336	1 026	3 362
	%	*69.5*	*30.5*	*100.0*
1998	circulation (thousand)	2 344	991	3 335
	%	*70.3*	*29.7*	*100.0*
Change 1998/1997, %		0.3	–3.4	–0.8

Sources: Annual reports of The Finnish Newspapers Association 1980 -.

The Finnish Audit Bureau of Circulations

Processed

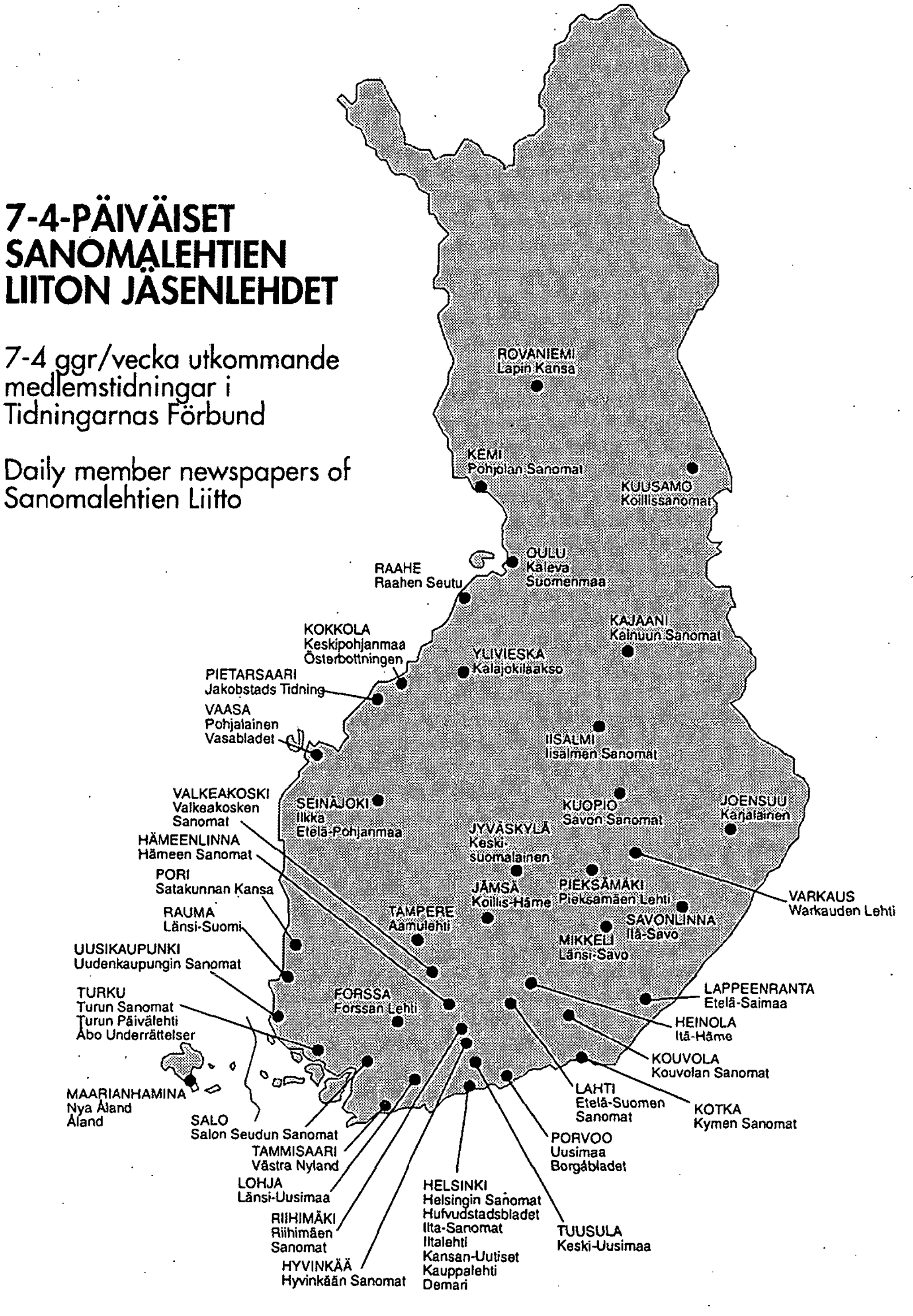
8.4 Circulation of newspapers per thousand persons 1980 – 1998

	Dailies (7–4 issues/week)	Non-dailies (3–1 issues/week)	Total
1980	495	208	703
1985	543	240	783
1986	542	243	785
1987	551	255	807
1988	550	270	819
1989	553	271	824
1990	558	261	818
1991	533	269	802
1992	512	255	767
1993	490	236	726
1994	472	223	695
1995	464	210	674
1996	455	207	662
1997	455	200	655
1998	455	192	647

Sources: Annual reports of The Finnish Newspapers Association 1980 –
The Finnish Audit Bureau of Circulations

Processed

Figure 8.2 Dailies by place of publication



8.5 Total circulation of newspapers by type of paper 1980 – 1997

	1980	1985	1991	1992	1993	1994	1995	1996	1997
	%								
Three biggest papers*	19.5	18.3	19.2	19.4	19.8	20.2	20.7	21.0	21.3
Other biggest papers in market areas	26.3	24.9	26.2	26.2	26.7	26.2	26.7	26.4	26.3
Second newspapers**	13.4	10.9	5.8	5.1	5.4	4.7	4.9	4.3	4.8
Swedish-language papers***	5.4	5.2	5.0	5.1	5.2	4.9	5.1	5.0	5.1
Evening tabloids	3.6	6.8	8.4	8.2	8.6	8.9	9.2	9.5	9.8
Special-interest papers	7.5	8.2	7.8	6.1	6.1	6.0	6.1	6.1	6.1
Other newspapers	24.3	25.8	27.6	29.9	28.2	28.7	27.3	27.7	26.6
Total	100	100	100	100	100	100	100	100	100
Circulation (thousand copies)	3 359	3 840	4 021	3 866	3 680	3 536	3 443	3 391	3 362

* *Helsingin Sanomat, Aamulehti, Turun Sanomat*

** *Smaller papers in towns with at least two newspapers.*

*** *Swedish-language papers have not been included in other categories.*

Sources: The Finnish Newspapers Association
The Finnish Audit Bureau of Circulations

Processed

8.6 Dailies: frecuency of publication, circulation, and readership 1998

Newspaper	Circulation	Change in circulation 1998/1997 %	Readership	Readers/copy
7 issues/week				
Aamulehti	132 952	1.1	355 000	2.7
Etelä-Saimaa	34 463	–0.1	83 000	2.4
Etelä-Suomen Sanomat	62 251	–0.3	153 000	2.5
Helsingin Sanomat	472 666	0.1	1 284 000	2.7
Hufvudstadsbladet	59 248	0.1	148 000	2.5
Hämeen Sanomat	30 388	–0.5	80 000	2.6
Iisalmen Sanomat	16 550	0.1	46 000	2.8
Ilkka	55 056	1.4	143 000	2.6
Itä-Savo	22 826	–1.9	52 000	2.3
Kainuun Sanomat	24 090	–0.5	68 000	2.8
Kaleva	83 883	0.0	221 000	2.6
Karjalainen	48 475	–0.3	133 000	2.7
Keski-Uusimaa	23 285	6.1	64 000	2.7
Keskipohjanmaa	29 637	0.5	88 000	3.0
Keskisuomalainen	76 040	0.4	192 000	2.5
Kouvolan Sanomat	30 217	–1.6	83 000	2.7
Kymen Sanomat	27 952	–1.8	72 000	2.6
Lapin Kansa	36 519	–0.3	96 000	2.6
Länsi Savo	26 237	–2.3	70 000	2.7
Länsi–Suomi	17 270	–1.1	48 000	2.8
Pohjalainen	33 406	–2.9	108 000	3.2
Pohjolan Sanomat	29 221	–4.7	70 000	2.4
Salon Seudun Sanomat	21 490	2.2	52 000	2.4
Satakunnan Kansa	56 915	0.6	140 000	2.5
Savon Sanomat	72 532	–0.5	187 000	2.6
Turun Sanomat	113 411	0.1	281 000	2.5
Uusimaa	12 468	–2.4	..	..
6 issues/week				
Forssan Lehti	14 585	–1.6	..	..
Hyvinkään Sanomat	12 389	2.5	..	..
Ilta-Sanomat	219 103	0.4	806 000	3.7
Iltalehti	118 460	7.1	638 000	5.4
Jakobstads Tidning	12 326	1.7	..	..
Länsi-Uusimaa	13 390	3.5	..	..
Riihimäen Sanomat	9 102		..	..
Vasabladet	26 855	0.0	65 000	2.4
Västra Nyland	10 846	–3.1	..	..
Warkauden Lehti	12 029	–0.3	..	..
Österbottningen	4 969			

8.6 Continued

Newspaper	Circulation		Change in circulation 1998/1997 %	Readership	Readers/copy
5 issues/week					
Borgåbladet	8 831		–0.4	..	..
Demari	25 669			82 000	3.2
Itä-Häme	12 988		–1.8	..	..
Kalajokilaakso	8 082		0.8	..	..
Kauppalehti	80 139		1.5	306 000	3.8
Koillissanomat	9 222	/97		..	..
Pieksämäen Lehti	7 590	/97		..	..
Suomenmaa	10 923	/97		..	..
Taloussanomat	8 705			..	..
Turun Päivälehti	5 042			..	..
Valkeakosken Sanomat	7 675		2.6	..	..
Åbo Underrättelser	6 977	/97		..	..
Åland	10 705		1.5	..	..
4 issues/week					
Kansan Uutiset	9 980			44 000	4.4
Koillis-Häme	7 064		0.5	..	..
Nya Åland	7 768	/97		..	..
Raahen Seutu	7 483		–0.6	..	..
Uudenkaupungin Sanomat	7 423	/97			

* *Newspapers that have audited their circulation in 1998 and/or 1997.*
Change in circulation given for newspapers with audit figures for both years.

Source: The Finnish Audit Bureau of Circulations

8.7 Newspapers (7 – 3 times/week) by political affiliation 1986 – 1997

Political affiliation	Share of circulation						
	1986	1989	1994	1995	1996	1997	1997
	%						Titles
Independent	68.3	74.1	88.9	92.9	94.6	93.2	62
National Coalition Party	10.7	8.7	1.9	–	–	–	–
Centre Party	12.7	11	6.9	5.2	3.2	3.6	6
Swedish People's Party in Finland	0.1	0.1	0.2	0.1	0.1	0.1	1
Social Democratic Party	4.0	2.4	2.1	1.8	2.1	3.1	11
Democratic League of the People/ Communist Party	3.4	3.7	–	–	–	–	–
Total	100.0	100.0	100.0	100.0	100.0	100.0	80

Sources: Finnish Newspapers Association

The Finnish Audit Bureau of circulations.

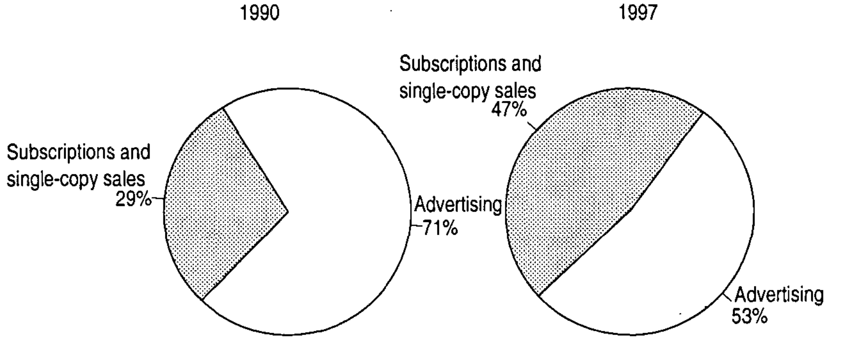
8.8 Newspaper revenues: dailies (7–4 days/week) 1988 – 1997

	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
	%									
Advertising	71	73	71	65	62	54	51	51	51	53
Subscriptions and single copy sales	29	27	29	35	38	46	49	49	49	47
Total	100	100	100	100	100	100	100	200	100	100

Note: In addition to advertising proper all classifieds including announcements, notices, column advertisements and public offices are also included.
The figures from 1993 onwards are not fully comparable with the figures for the earlier years.

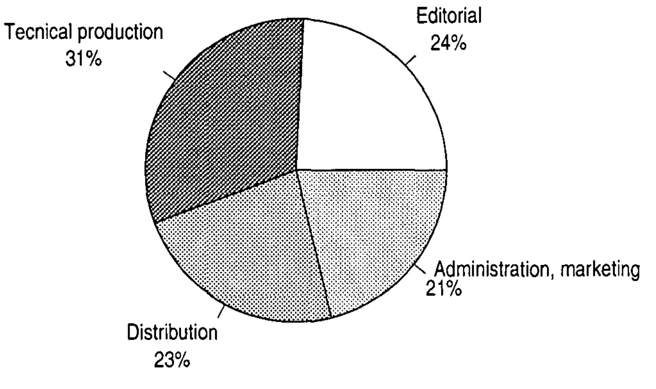
Source: The Finnish Newspapers Association

Figure 8.3 Dailies: Breakdown of revenues 1990 and 1997



Source: Table 8.8

Figure 8.4 Dailies: breakdown of costs 1996



Source: Table 8.11

8.9 Newspaper revenues: non-dailies (3–1 days/week) 1992 – 1997

	1992	1993	1994	1995	1996	1997
	%					
Advertising	67	68	60	60	60	63
Subscriptions and single copy sales	33	32	40	40	40	37
Total	100	100	100	100	100	100

Note: In addition to advertising proper all classifieds including announcements, notices, column advertisements and public offices are also included.

Source: The Finnish Newspapers Association

8.10 Breakdown of newspaper sales 1992 – 1997

	Subscriptions	Single copy sales
	%	
1992	87	13
1993	87	13
1994	89	11
1995	89	11
1996	89	11
1997	89	11

Source: The Finnish Newspapers Association

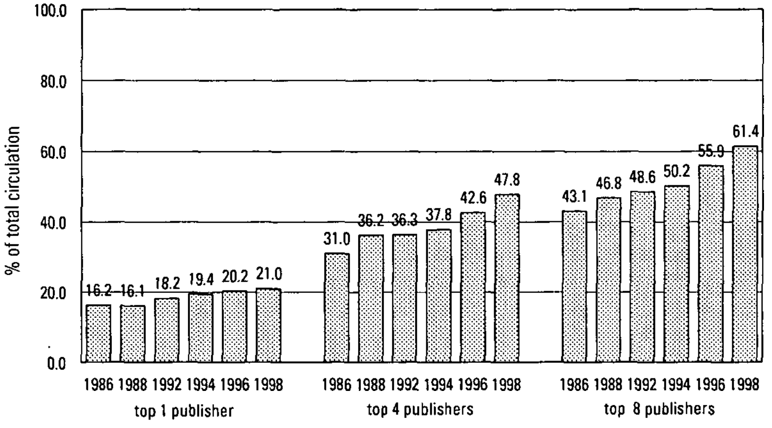
8.11 Breakdown of newspaper costs 1990 – 1996

	1990	1992	1994	1996
	%			
Editorial	22.3	23.4	24.5	24.2
Technical production	36.0	33.8	32.7	31.0
Distribution	21.9	24.3	24.1	23.4
Administration, marketing	19.8	18.5	18.7	21.4
Total	100	100	100	100

* *Based on one-week samples of dailies. (Week,47.)*
In 1996 a total of 42 newspapers provided data for the statistics.

Source : The Finnish Newspapers Association.

Figure 8.5 Major newspaper publishers' share of total circulation 1986 – 1998



Circulation data: The Finnish Audit Bureau of Circulation

8.12 Top 10 newspaper publishers according to circulation 1998

(All newspapers = 7 – 1 issues/week) Publisher	Newspaper titles	(Of which dailies)	Circulation '000 copies	% of circulation of all newspapers
Sanoma Corporation *	3	(3)	700.4	21.0
Aamulehti Group	22	(10)	571.8	17.1
Keski-Suomen Media	15	(4)	175.0	5.2
TS Group	5	(3)	151.1	4.5
Kymen Lehtimedia*	10	(3)	127.2	3.8
Ilkka	8	(2)	121.2	3.6
Keskisuomalainen	7	(1)	111.8	3.4
Maataloustuottajain Palvelu	1	(–)	95.0	2.8
SD-lehdistö	12	(2)	85.7	2.6
Kirjapaino Kaleva	1	(1)	83.9	2.5
Top 10	84	(29)	2 223.1	66.5
All newspapers	220	(56)	3 334.4	100

* *In spring 1999 Kymen Lehtimedia was sold to Sanoma Corporation.*

Circulation data: The Finnish Audit Bureau of Circulations

8.13 Top 10 daily newspaper publishers according to circulation 1998

(Dailies = 7 – 4 issues/week) Publisher	Titles	Circulation '000 copies	% of circulation of all dailies
Sanoma Corporation*	3	700.5	29.9
Aamulehti Group	10	500.5	21.4
TS Group	3	142.3	6.1
Keski-Suomen Media	4	108.7	4.6
Kymen Lehtimedia*	3	92.6	4.0
Ilkka	2	88.4	3.8
Kirjapaino Kaleva	1	83.9	3.6
Keskisuomalainen	1	76.0	3.2
Esan Kirjapaino	2	75.2	3.2
Konstsamfundet	3	73.0	3.1
Top 10	32	1 941.1	82.9
All dailies	56	2 343.7	100

* *In spring 1999 Kymen Lehtimedia was sold to Sanoma Corporation.*

Circulation data: The Finnish Audit Bureau of circulations

8.14 Contents of dailies 1991 – 1996*

	1991	1992	1994	1996
Editorial material	% of space			
Articles	5.3	5.7	5.1	5.1
Culture	6.3	6.8	6.1	6.8
Home news	33.6	33.9	33.4	31.6
International news	7.6	6.7	7.3	6.5
Economy	8.4	8.0	8.0	8.1
Sports	14.4	14.8	14.8	14.7
Entertainment	11.0	10.4	11.1	13.7
Letters to the Editor	2.4	2.6	2.6	2.5
Cartoons	2.9	2.9	2.6	3.3
Radio & TV pages	8.2	8.3	9.0	7.7
Total	**100**	**100**	**100**	**100**
Breakdown of total registered space**				
Editorial material	64.9	71.6	70.8	69.1
Advertisements	35.1	28.4	29.2	30.9
Total	**100**	**100**	**100**	**100**

* *Based on one-week samples of dailies. (Week 47.) Breakdown of material calculated on the basis of total space. In 1996 a total of 42 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.*

Source: The Finnish Newspapers Association.

8.15 Sources of text material in dailies 1991 – 1996*

	1991	1992	1994	1996
	% of text space			
Produced by in-house staff	44.8	45.3	44.7	45.3
Produced by outside contributors	11.7	11.8	11.3	11.8
Material from news agencies/ purchased materials	34.2	32.0	31.0	32.0
Material submitted**	9.4	10.9	13.0	10.9
Total	100	100	100	100

* *Based on one-week samples of dailies. (Week 47.) In 1996 a total of 42 newspapers provided data for the statistics.*

** *Includes unsolicted 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 Newspapers Association.

8.16 Newspapers delivered by the Post Office 1980 – 1997*

	Newspapers	With regular post	Special delivery**	Local papers	Total
	Million copies	%	%	Million copies	Million copies
1980	349.0	77	23	52.6	401.6
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	294.2	..	..	74.1	368.3
1994	273.9	..	..	53.1	327.0
1995	284.2	..	..	50.0	334.2
1996	309.8	..	..	48.2	358.0
1997	367.2	..	..	47.8	415.0

* *To Finnish and overseas addresses*

** *In the case of newspapers consists chiefly of early-morning deliveries*

Source: Posts and Telecommunications/Suomen Posti Oy

8.17 Finnish newspapers: methods of delivery 1986 – 1997*

	1986	1989	1991	1994	1996	1997
	%					
Delivery by newspaper	16	9	6	4	5	5
Joint delivery arragement	48	53	59	61	54	40
Post Office, early morning	11	14	16	17	24	40
Post Office, regular post	25	24	19	18	17	15
Total	100	100	100	100	100	100
(No. of papers responding)	(48)	(45)	(56)	(39)	(54)	(69)

* *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 8.18*

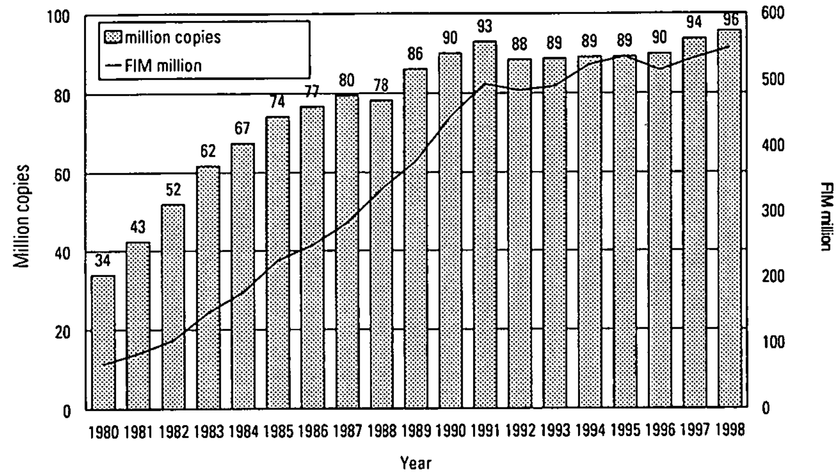
Source: *The Finnish Newspaper Publishers' Association/VTT*

8.18 Single-copy sales of Finnish and foreign newspapers 1980 – 1998

	All Finnish newspapers		Share of 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
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
1994	93.2	552.7	89.1	95.6	523.0	94.6	0.7	7.8
1995	93.2	566.2	89.2	95.7	535.2	94.5	0.7	7.8
1996	93.6	545.3	89.9	96.0	514.7	94.4	0.7	7.7
1997	97.4	563.8	93.7	96.2	532.7	94.5	0.7	8.4
1998	99.2	582.4	95.6	96.3	548.0	94.1	0.7	8.1

Source: *Rautakirja Oy*

Figure 8.6 Single-copy sales of evening papers 1980 – 1998



Source: Table 8.18

8.19 Newspaper readership 1992 – 1998

Has read during the previous day

		%	Min/day
1992	All	89	43
1994	All	87	36
1996	All	87	40
1998	All	91	42
1998			
Sex	Women	90	39
	Men	93	46
Age	15 – 24	91	26
	25 – 44	90	35
	45 – 59	94	51
	60 –	93	79

Source: MDC Helsinki Group-Media Research Ltd.

8.20 Turnover of free sheets 1980 – 1997

	Current prices FIM million	Fixed (1997) prices FIM million
1980	85	185
1985	230	332
1986	270	376
1987	290	390
1988	305	391
1989	315	379
1990	325	369
1991	285	310
1992	245	260
1993	230	239
1994	270	278
1995	280	285
1996	300	304
1997	310	310

Source: Statistics Finland

8.21 Free sheets: number, total print, volume and revenue from advertising 1984 – 1994

	1984	1989	1994
Number of titles	131	141	106
Total print (million copies)	3.3	3.7	3.5
Volume (million copies)	185	230	185
Advertising revenue (FIM million)	215	315	270

* *Free sheet 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, 4/1990, 4/1995

8.22 Free sheets readership 1992 – 1998

Has read during the previous day

		%	Min/day
1992	All	19	3
1994	All	18	3
1996	All	22	3
1998	All	25	4
1998			
Sex	Women	26	4
	Men	24	4
Age	15–24	27	4
	25–44	26	4
	45–59	26	3
	60 –	23	6

Source: MDC Helsinki Group-Media Research Ltd.

9 Magazines and periodicals

Measured in terms of sales volume, magazines and periodicals are the second-biggest mass media in Finland after dailies. In 1997 the turnover of the magazine business was around FIM 3.4 billion, representing 18 per cent of the turnover of all mass media (Table 1). If the 1990s have been a survival story for newspapers, for magazines the past decade has been more of a success story.

The main sources of income for magazines are subscriptions and single-copy sales, but in recent years the role of advertising revenue has been increasing (Table 5). Indeed magazines and periodicals account for an increasing share of total advertising revenue in the mass media: in 1997 the figure was 15 per cent. In recent years the trends in magazine advertising in Finland have been moving in the opposite direction than in many other European countries. In many countries magazines saw their share of the advertising cake decrease particularly from the mid-1980s up to the mid-1990s. The difference between Finland (15% in 1997) and the average level in Europe (19% in 1996) has been reduced to four percentage points from double figures in 1990 (cf. Table 3 in Chapter 12).

Audits indicate that net circulations of magazines have also developed favourably in recent years. A number of new magazines have been launched during the past couple of years, particularly in the special-interest sector. There is a growing trend to test the markets ahead of the actual launch of new magazines by releasing spin-offs, or even to create whole families of magazine titles under more established names.

Four in five consumer magazines in Finland are delivered direct to subscribers (Table 6). Indeed Finland is one of the few European countries where revenues from subscriptions to consumer magazines exceed the revenues from single-copy sales. According to the statistics published in World Magazine Trends 1996, for instance, there were only two other countries with the same situation, namely Holland and Sweden. However, the ratio of subscriptions to single-copy sales is in a league of its own in Finland. This applies to both magazines and newspapers.

There is a large selection of magazines and periodicals in Finland. In 1998, the total number of magazine titles was around 2 700. These magazines are included in the delivery statistics maintained by Finland Post and meet the following criteria:

- they appear regularly at least four times during the calendar year (the traditional definition as specified in the Freedom of the Press Act);
- they contain in each issue several articles or other editorial material;

- anyone can subscribe to these magazines or periodicals, or they are delivered on a membership or customer basis to the receiver's address; and
- the contents do 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 magazine titles at around 5 000. However, this figure is based on the Unesco classification and includes all periodicals (excluding newspapers) that are published at least twice a year. According to the University of Helsinki free copy register some 3 500 of these were published four times a year in 1997 (Table 2).

The discussion that follows is based primarily on the former, quarterly definition, which means it is concerned with some 2 700 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 (316 titles in 1998);

2 *Trade and business magazines*, which are divided by subject area into a number of groups (2 062 titles);

3 *Opinion journals*, which are further divided by subject into society and politics, culture, religion and other ideological publications (152 titles); and

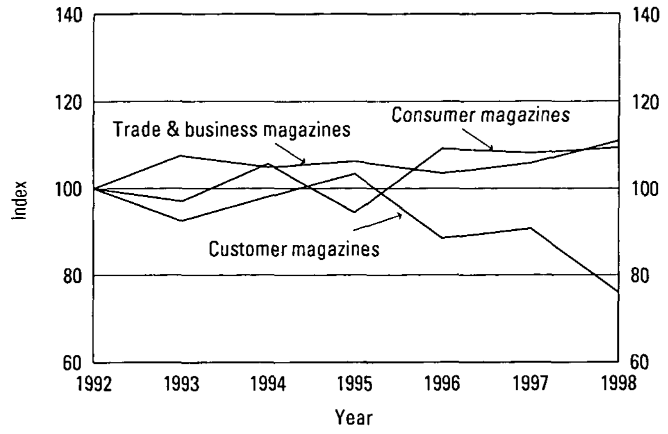
4 *Customer magazines*; these are published and paid by large business enterprises, e.g. banks, and delivered to customers or the general public free of charge (208 titles).

Finland Post has used this classification in compiling statistics on the volume of magazines and periodicals it delivers (Tables 8 & 9). Adding the number of single copies sold (Table 10) to the category of consumer magazines, the total volume of magazines and periodicals (= circulation multiplied by number of issues per year) amounts to around 380 million copies. Divided equally among all households in the country, this translates into 164 issues of magazines or three annual subscriptions to weekly magazines or as many as 14 annual subscriptions to monthly magazines per household.

The breakdown of the annual volume of magazines by category in 1998 was as follows:

– Consumer magazines	40%
– Trade & business magazines	41%
– Opinion journals	3%
– Customer magazines	15%

Figure 9.1 Magazine categories: volume index 1992 – 1998 (1992=100)



Sources: Tables 9.8 & 9.10

Data on the volume of magazines delivered by Finland Post were classified by type of magazine for the first time in 1992. Circulation data compiled by the Finnish Audit Bureau of Media provide a useful tool for the analysis of longer-term trends in development. However, it is important to note that the number of magazines with audited circulation figures may vary considerably from year to year. Audits are mainly commissioned by papers for which advertising is an important source of revenue, which means that these data only cover a small portion (but certainly an important portion when measured in terms of circulation and readership numbers) of all magazine titles. In 1998, some 250 magazines had valid audit figures.

Single-copy sales of domestic magazines dropped in the early 1980s. Since then there have been no dramatic changes in the numbers of copies sold (Table 10). On the other hand, sales of afternoon tabloids, a major rival for magazines in the single-copy market, increased very sharply in the 1980s (cf. Table 17 in the Newspapers Chapter). Today, single-copy sales of afternoon tabloids exceed the combined single-copy sales of all magazines more than three times over. This may be regarded as a clear indication of the relative weakness of single-copy sales and the strength of subscriptions in the Finnish magazine market.

Single-copy sales of foreign magazines increased particularly in the mid-1980s, but the trend then came to a standstill. During the early 1990s single-copy sales of foreign magazines declined (Table 10). Sales figures for 1998 (3.4 million copies) were down by 0.8 million compared to the peak year of 1991 (4.2 million copies).

Most of the single copies of foreign magazines were in the category of special-interest magazines. General-interest, family and women's titles account for about one-quarter of the sales value of foreign magazines. (Table 12).

There are three magazine publishers in Finland that are clearly bigger than the rest of the field. In the late 1980s the takeover by Yhtyneet Kuvalehdet of Lehtimiehet made Yhtyneet Kuvalehdet by far the biggest company in the business. The company is now owned by Otava, the country's second biggest book publisher. The two other major publishing houses are Helsinki Media Company, which is a part of Sanoma - WSOY Group, and A-lehdet. In 1997 these three biggest publishers together published 71 consumer magazine titles with a combined annual volume of 97 million copies (Table 7.)

Among the biggest magazine companies in Finland there are four (Aller, Forma, Bonnier Julkaisut and Valitut Palat-Reader's Digest) which are in foreign ownership. Semic, now known as Egmont Kustannus, which was under the ownership of Swedish-based Bonnier, the biggest media company in Scandinavia, was sold in 1997 to the Danish company Egmont (50%) and Helsinki Media Company (50%). In 1990 foreign-owned publishers accounted for 10 per cent of the production volume of the eight biggest publishers in Finland, in 1997 the share had increased to 17 per cent. This increase can be attributed almost entirely to the continued success in the Finnish marketplace of Denmark's biggest magazine publisher Aller, which started up in Finland in 1992 (Table 7).

Finnish publishing houses have not been very active in terms of foreign expansion, although Helsinki Media has taken some steps to move into the Scandinavian market and Yhtyneet Kuvalehdet into the Baltic region. Helsinki Media publishes three magazines in Sweden. Its biggest project was launched in 1994, a Swedish version of a highly successful Finnish concept (ET-lehti, cf. Figure 2) intended for the 'grey panthers' segment.

In 1997 the eight biggest publishing houses accounted for about 30 per cent of the total volume of Finnish magazines and periodicals and for around 80 per cent of the volume of consumer magazines. These estimates are based on volume data published by Finland Post and Rautakirja Oy.

Statistical sources

The net circulations of magazines are audited annually by The Finnish Audit Bureau of Circulations. The same company is behind the National Readership Survey, which measures the readerships of the biggest magazine and newspaper titles. The methods of data collection and estimation were revised at the beginning of 1995, and the results of the latest measurements are therefore not directly comparable with earlier statistics.

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 magazine titles published in Finland. However, the definitions applied for magazines and other periodicals in these statistics are not unambiguous.

The data on the single-copy sales of domestic and foreign magazines come from the Annual Reports and other statistics compiled by Rautakirja Oy, which dominates the distribution of single copies in Finland.

The Intermedia surveys published every other year by MDC Media Research Ltd contain information on the reading of magazines and changes in reading patterns.

Tuomo Sauri

Figures

Tables

9.1 Turnover of magazines 1980 – 1997

	Current prices FIM million	Fixed (1997) prices FIM million
1980	1 205	2 620
1985	2 125	3 069
1986	2 180	3 039
1987	2 280	3 067
1988	2 460	3 154
1989	2 740	3 296
1990	2 970	3 368
1991	2 890	3 147
1992	2 750	2 918
1993	2 770	2 878
1994	2 810	2 889
1995	3 020	3 074
1996	3 200	3 238
1997	3 400	3 400

Source: Statistics Finland

9.2 Number of magazines and periodicals by frequency of publication 1980 – 1997*

Year	Frequency of publication					Total	Language			
	Once a week	1–2 times a month	4–11 times ayear	2–3 times a year	2–11 times a year total		Finnish	Finnish and Swedish	Swedish	Other languages
1980	68	546	..	..	2 992	3 606	3 080	271	195	60
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
1993	88	518	2 676	1 231	3 907	4 513	3 642	235	200	436
1994	77	510	2 761	1 333	4 094	4 681	3 699	247	221	514
1995	76	462	2 857	1 423	4 280	4 818	3 796	267	219	536
1996	65	451	2 921	1 444	4 365	4 881	3 844	261	222	554
1997	62	443	2 980	1 530	4 510	5 015	3 917	272	227	599

* *Periodicals appearing at least twice a year.*

** *Additionally some 400 magazines for which data were not available on frequency of publication.*

Source: Helsinki University Library, Bibliographical department

9.3 Total circulations of selected magazine and periodical categories 1980 – 1997

	General-interest & family magazines* '000 copies	Women's magazines**	Special interest magazines	Consumer magazines total	Trade & business magazines	Customer magazines
1980	1 421.6	1 067.8	2 364.9	4 854.3	3 030.8	4 492.4
1985	1 370.7	1 180.6	2 610.5	5 161.8	4 121.9	5 611.5
1986	1 296.3	1 099.8	2 604.3	5 000.4	4 136.7	5 686.7
1987	1 286.5	1 125.1	2 769.3	5 180.9	4 171.3	6 341.7
1988	1 243.3	1 147.7	2 827.4	5 218.4	4 386.5	6 522.1
1989	1 390.3	1 173.2	2 892.8	5 456.3	4 084.3	6 572.3
1990	1 374.7	1 200.6	2 873.9	5 449.2	4 611.5	6 543.4
1991	1 344.2	1 194.9	2 872.0	5 411.1	4 559.8	6 581.6
1992	1 409.5	1 186.5	2 797.5	5 393.5	3 467.7	5 883.8
1993	1 369.8	1 184.3	2 729.1	5 283.2	3 303.6	4 247.7
1994	1 314.2	1 181.0	2 727.9	5 223.1	3 360.8	4 842.9
1995	1 359.2	1 181.7	2 942.5	5 483.4	3 546.9	4 830.8
1996	1 384.5	1 198.5	3 025.7	5 608.7	4 027.3	4 871.6
1997	1 392.2	1 202.0	3 093.7	5 687.9	3 966.7	4 553.3
1998	1 360.2	1 193.8	3 711.1	6 265.1	3 895.5	3 559.8

Magazines and periodicals that have audited their circulation.

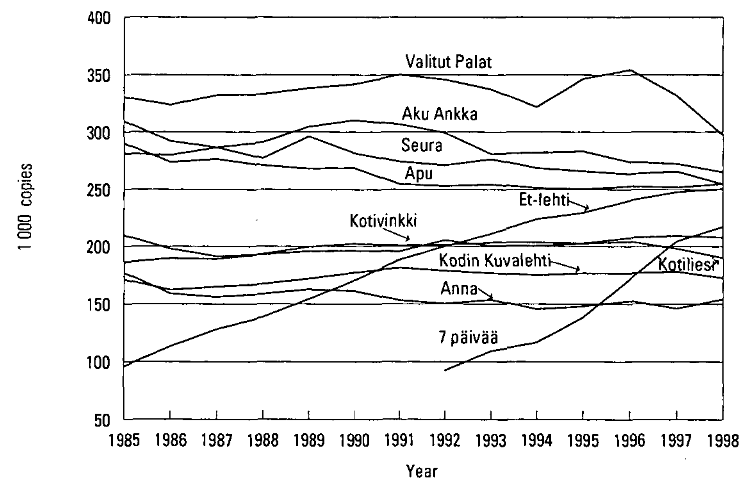
Note. *The number of magazines and periodicals may vary considerably from year to year.*

* *Apu, Hymy, Nykyposti, SE (1989-), Seura, Suomen Kuvalehti, Valitut Palat, 7 päivää (1992-)*

** *Anna, Eeva, Gloria (1987-), Jaana (-1984), Kauneus ja Terveys, Kodin Kuvalehti, Kotiliesi, Kotivinkki (1983 -) Me Naiset, Muoti+Kauneus, Prima (1983-1985), Regina, Trendi (1990-)*

Sources: The Finnish Audit Bureau of Circulations
Association of Finnish Periodicals

Figure 9.2 Top ten consumer magazines by circulation 1985 – 1998



Source: The Finnish Audit Bureau of Circulations

9.4 Circulations and readership of the biggest magazines 1998

Magazine	Circulation	Change 1998/1997	Readership	Readers/ copy	Publisher
Biggest general-interest and family magazines					
Valitut Palat (Reader's Digest)	297 478	–10,4	914 000	2.8	Valitut Palat - Reader's Digest Oy
Seura	254 504	–4,2	1 146 000	4.3	Yhtyneet Kuvalehdet
Apu	254 890	1.3	1 129 000	4.5	A-lehdet
7 päivää	217 307	6.4	848 000	4.2	Aller Julkaisut
Suomen Kuvalehti	95 381	–1,3	447 000	4.6	Yhtyneet Kuvalehdet
Biggest special-interest magazines					
ET-lehti	250 420	1.1	766 000	3.1	Helsinki Media
Kotivinkki	207 997	–0,6	495 000	2.4	Kustannus Forma
Kotiliesi	190 180	–4,0	646 000	3.3	Yhtyneet Kuvalehdet
Kodin Kuvalehti	172 524	–3,1	681 000	3.8	Helsinki Media
Anna	154 154	5.5	555 000	3.8	Yhtyneet Kuvalehdet
Biggest comic magazines					
Aku Ankka (Donald Duck)	265 001	–2,7	784 000	2.9	Hesinki Media
Roope-setä	60 920	0.7	..	..	Helsinki Media
Nalle Puh	46 562	10.7	..	..	Helsinki Media
Biggest trade & business magazines					
Metsästäjä	294 787	2.1	..	..	Hunters' Central Organization
Kunta ja Me	236 129 /97		..	..	Municipal Workers and Employees Association KTV
Kirkko ja kaupunki	199 793	1.3	239 000	1.2	Lutheran Parish Union of Helsinki
Taloustaito	174 710 /97		226 000		Finnish Taxpayers' Association
Tehy	104 439 /97		..	..	Tehy
Biggest customer magazines					
Pirkka	1 039 360	–54,4	3 189 000	1.4	Kauppiaitten Kustannus
Kultaraha	738 119 /97		511 000	0.7	OP-Julkaisut
Yhteishyvä	653 092	20.5	973 000	1.8	SOK
Me	466 614	25.1	585 000	1.6	Viestintärengas
Elanto	194 516	10.1	..	..	Kaupparengas

Magazines and periodicals that have audited their circulation in 1997 and/or 1998. Change in circulation given for magazines with audit figures for both years.

Source: The Finnish Audit Bureau of Circulations

9.5 Magazine revenues 1992 – 1997

	Subscriptions	Single copy sales	Advertising	Total
	%			
1992	68	17	15	100
1993	68	16	16	100
1994	63	17	20	100
1995	62	17	21	100
1996	63	16	21	100
1997	60	16	24	100

The figures are estimates

Source: Chapter 1, tables 1 & 4. Table 10 in this chapter.

9.6 Type of consumer magazine sales 1992 – 1997

	Subscriptions	Single copy sales	Total
1992	77	23	100
1993	79	21	100
1994	80	20	100
1995	80	20	100
1996	81	19	100
1997	81	19	100

The figures are estimates.

Source: Tables 8 and 10 in this chapter.

9.7 Biggest publishers of consumer magazines: yearly volumes and mutual shares of volume 1989 – 1997

Publisher	1989	1990	1991	1992	1993	1994	1995	1996	1997	Number of titles 1997
	Mill.copies									
Yhtyneet Kuvalehdet	47.1	46.1	44.7	44.3	43.6	41.5	39.9	41.0	41.2	31
Helsinki Media Company	34.0	33.7	33.5	33.4	32.8	33.3	33.9	33.8	34.0	28
A-lehdet	23.7	23.1	22.3	21.2	20.5	20.6	21.3	21.0	21.6	12
Aller Julkaisut	–	–	–	4.8	5.7	6.1	7.2	9.3	11.0	2
Valitut Palat–Reader's Digest	4.1	4.1	4.2	4.2	4.0	3.9	4.2	4.3	4.0	1
Kustannus Forma	2.2	2.4	2.4	2.7	2.8	2.6	2.6	2.9	3.3	5
Egmont Kustannus*	4.1	3.2	3.4	3.2	3.0	2.7	3.1	3.1	2.7	24
Bonnier Julkaisut	1.7	2.0	1.9	1.9	1.8	1.6	1.9	1.8	2.0	5
Total	116.9	114.6	112.4	115.7	114.2	112.3	114.1	117.2	119.7	108
	%									
Yhtyneet Kuvalehdet	40.3	40.2	39.8	38.3	38.2	37.0	35.0	35.0	34.5	
Helsinki Media Company	29.1	29.4	29.8	28.9	28.7	29.7	29.7	28.8	28.4	
A-lehdet	20.3	20.2	19.8	18.3	18.0	18.3	18.7	17.9	18.1	
Aller Julkaisut	–	–	–	4.1	5.0	5.4	6.3	7.9	9.2	
Valitut Palat-Reader's Digest	3.5	3.6	3.7	3.6	3.5	3.5	3.7	3.7	3.3	
Kustannus Forma	1.9	2.1	2.1	2.3	2.5	2.3	2.3	2.5	2.7	
Egmont Kustannus*	3.5	2.8	3.0	2.8	2.6	2.4	2.7	2.6	2.3	
Bonnier Julkaisut	1.5	1.7	1.7	1.6	1.6	1.4	1.7	1.5	1.6	
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	

For magazines without audited circulation (mainly comic books), the figures have been estimated.
The figures do not include crossword puzzle magazines.

* *Until June 1997 Kustannus Oy Semic (Bonnier).*

Circulation data: The Finnish Audit Bureau of Circulations.

9.8 Magazines and periodicals delivered by the Post Office by type of magazine 1992 – 1998

	1992		1993		1994		1995	
	Million copies	%	Million copies	%	Million copies	%	Million copies	%
Consumer magazines total	108.1	32.1	106.8	31.3	117.6	33.6	120.2	33.2
Trade & business magazines total	141.5	41.9	152.3	44.7	148.5	42.4	150.4	41.6
Opinion journals total	13.2	3.9	12.8	3.8	11.1	3.2	13.9	3.9
Customer magazines – Total	74.6	22.1	69.0	20.2	73.2	20.9	77.1	21.3
Magazines and periodicals total	337.4	100.0	340.8	100.0	350.4	100.0	361.6	100.0

9.8 Continued

	1996		1997		1998		Change 1998/97
	Million copies	%	Million copies	%	Million copies	%	%
Consumer magazines total	123.8	35.4	122.9	34.7	122.0	35.0	–0.7
Trade & business magazines total	146.4	41.8	149.9	42.4	157.1	45.1	4.8
Opinion journals total	13.7	3.9	13.3	3.8	12.9	3.7	–3.0
Customer magazines – Total	66.0	18.9	67.7	19.1	56.6	16.2	–16.4
Magazines and periodicals total	349.9	100.0	353.7	100.0	348.6	100.0	–0.4

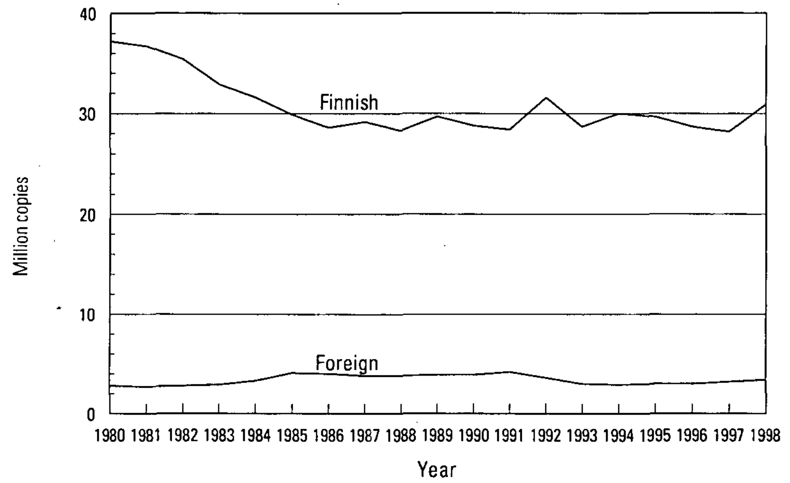
*Source: Posts and Telecommunications/
Suomen Posti Oy, magazine delivery services*

9.9 Magazines and periodicals delivered by the Post Office by type of magazine 1998

	Million copies	%
General -interest and family magazines	48.5	13.9
Women's magazines	27.1	7.8
Children's and juvenile magazines	20.1	5.8
Special-interest and hobby magazines	26.3	7.5
Consumer magazines total	**122.0**	**35.0**
Forestry & agriculture	10.4	3.0
Industry, technology	15.3	4.4
Architecture, building & construction	5.6	1.6
Trade, services	6.2	1.8
Computers & ADP	5.9	1.7
Auto & transport	7.0	2.0
Business economics	10.5	3.0
Financing & insurance	2.7	0.8
Marketing & communication	6.1	1.7
Public administration	15.6	4.5
Social welfare and health care	18.5	5.3
Education	5.3	1.5
Church & religion	26.8	7.7
Entertainment, culture	8.7	2.5
Sports	12.4	3.6
Trade & business magazines total	**157.1**	**45.1**
Society and politics	3.9	1.1
Culture	0.1	0.0
Religion	7.2	2.1
Other opinion journals	1.7	0.5
Opinion journals total	**12.9**	**3.7**
Customer magazines	**56.6**	**16.2**
Magazines and periodicals total	**348.6**	**100**

*Source: Posts and Telecommunications/
Suomen Posti Oy, magazine delivery services*

Figure 9.3 Single-copy sales of magazines and periodicals 1980 – 1998



Source: Table 9.10

9.10 Single-copy sales of Finnish and foreign magazines and periodicals 1980 – 1998

	Magazines					
	Finnish Million copies	FIM million	Foreign Million copies	FIM million	Total Million copies	FIM million
1980	37.2	239.2	2.8	21.9	40.0	261.1
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	427.8	3.0	73.7	31.7	501.5
1994	30.0	454.0	2.9	75.6	32.9	529.6
1995	29.7	487.0	3.0	81.2	32.6	568.3
1996	28.7	504.5	3.0	81.3	31.7	585.8
1997	28.2	517.0	3.2	90.7	31.4	607.7
1998	30.9	550.9	3.4	101.1	34.2	652.0

Source: Rautakirja Oy

9.11 Single-copy sales of Finnish magazines and periodicals by type of magazine 1997

Type of magazine	Thousand copies	%	FIM million	%
General interest & family	4 986	17.7	83.6	16.2
Women's	3 836	13.6	67.5	13.1
Crossword puzzles	2 488	8.8	35.3	6.8
Sports and betting	2 206	7.8	28.1	5.4
Comic books	1 106	3.9	16.6	3.2
Youth & music	757	2.7	14.7	2.8
Men's	673	2.4	24.3	4.7
Cars, boats & motors	676	2.4	21.3	4.1
Beauty & health	670	2.4	17.9	3.5
Home	508	1.8	15.8	3.1
Information technology & electronics	497	1.8	15.3	3.0
Readers	409	1.5	7.5	1.5
Fashion and handicrafts	275	1.0	9.3	1.8
Other magazines	787	2.8	22.5	4.4
Albums	1 716	6.1	44.4	8.6
Serials and paperbacks	657	2.3	17.9	3.5
One-off publications	65	0.2	2.4	0.5
Calendars	9	0.0	0.5	0.1
Mags for classified advertising	4 688	16.6	59.7	11.5
Hockey cards etc.	1 175	4.2	12.3	2.4
Total	28 184	100.0	516.8	100.0

Source: Rautakirja Oy.

9.12 Single-copy sales of foreign magazines and periodicals by type of magazine 1997

Type of magazine	FIM million	%
Family	11.0	12.1
Other general interest & family	4.3	4.8
Women's	9.6	10.6
Fashion and handicrafts	3.6	4.0
Beauty, health & fitness	1.4	1.6
Home decoration & building	6.5	7.2
Other magazines for women	1.2	1.3
Cars, boats & motors	8.0	8.8
Computer	10.2	11.2
Sports & games	3.9	4.3
Music	5.6	6.1
Hobbies	3.8	4.1
Men's lifestyle	0.8	0.9
Sophisticates	7.4	8.1
Teenagers'	8.9	9.9
Crosswords	0.5	0.6
Comic magazines	2.8	3.1
Booklets, albums	0.9	1.0
Other	0.3	0.3
Total	90.7	100.0

Source: Rautakirja Oy

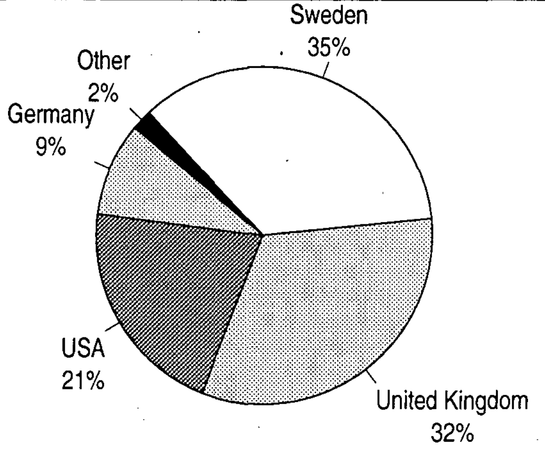
9.13 Magazines & periodicals readership 1992 – 1998

Has read during the previous day

		%	Min/day
1992		73	43
1994		77	45
1996		76	39
1998		82	49
1998			
Sex	Women	81	48
	Men	83	50
Age	15 – 24	79	42
	25 – 44	81	40
	45 – 59	84	53
	60 –	83	76

Source: MDC Helsinki Group-Media Research Ltd.

Figure 9.4 Single-copy sales of foreign magazines and periodicals by country of origin 1997



Source: Rautakirja Oy

10 Mass media and new communications technology

Finland is one of the world's leading countries as far as the adoption and use of new communications technology is concerned. For instance, in 1998 it was estimated that Finland together with Iceland had more Internet subscriptions per capita than any other country in the world. Similarly, expenditure on information technology as a proportion of GDP and the number of home computers recently ranked among the highest in the world.

As well as influencing the methods and modes of presenting different contents (e.g. multimedia), new communications technology also has an impact on the technical production and distribution of products and services.

Major structural changes are also taking place at the corporate level. Traditional boundaries between different branches and industries are obscured with the strategic alliances that are being formed at both the national and international level. In Finland, we have recently seen two new major multimedia businesses created through mergers (Sanoma - WSOY and Alma Media). On the international scene, the Swedish-based Marieberg and the German company Bertelsmann are among the new major players that are involved in both the traditional printing industry, electronic communications and in the new media industry.

Hardware

In households, the development of new communications technology has had three main effects: 1) the range of programming available has expanded; 2) the ways of using different media have become more and more individualized; and 3) there has been a tendency towards greater interactivity. At least the former two trends were already reinforced by such more 'traditional' forms of home electronics as VCRs and CD-players; and on the other hand by the rapid growth of satellite and cable television.

Figure 1 illustrates how certain kinds of new communications technology have been spreading in Finnish households; some more 'traditional' categories are also included for comparison. Both entertainment electronics and PCs have been spreading in private households more rapidly in other Nordic countries than in Finland. It is not until after the mid-1990s that we have seen the number of PCs, videos and CD-players in households increase more rapidly. The number of

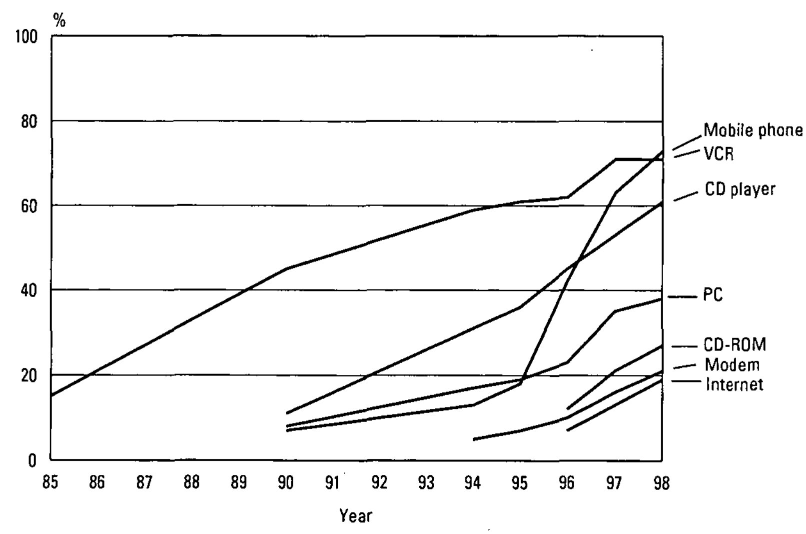
CD-ROMs, modems and Internet connections is also rapidly increasing. In autumn 1998, about one in four households in Finland had a CD-ROM, one in five had an Internet connection.

According to data describing selection into groups using new communications technology, it seems that most people who use home computers nowadays are young men in small households as well as children and young people in family households. However, there are now signs of increasing convergence in this regard.

None of the categories of entertainment electronics mentioned above gets anywhere near the pace at which mobile phones have been spreading in Finnish households. Surveys indicate that within the space of just three years, the penetration of mobile phones in Finnish households has increased from less than 20 to almost 75 per cent. (Figure 1.)

Based on the Universal Mobile Telecommunication Service (UMTS), the next generation of mobile phones will include such features as moving picture and multimedia. The first UMTS networks are due to be introduced in Finland in 2002, and operating licences have now been granted for four nationwide networks. If the pace at which mobile phones penetrated Finnish households is anything to go by, we can expect to see Finland again among the first countries in the world to introduce this technology.

Figure 11.1 Penetration of selected household equipment 1985 – 1998



Source: Statistics Finland, Household surveys and consumer barometers.

Comparative data published by the European Union indicate that Finland ranks clearly above the European average in terms of access to computers or CD-ROM (at home, at place of study or in the workplace). As regards access to modems and the Internet, Finland ranked among the top countries. (Table 2. Cf. also Table 15 in Chapter 12 of this publication.)

New media industry

In 1998 the Finnish new media industry had an estimated turnover of FIM 700 million (Table 4). For the present purposes the new media industry is defined as comprising companies which operate in content production, technical solutions and related support services for digital media (e.g. multimedia and CD-ROM) and/or information networks (e.g. Internet). In 1999, the mean age of these companies was no more than 3–4 of years, yet the total number of companies had climbed to around 330.

It is quite natural for small companies that often start out on an amateur basis to cluster so that they can be organized for more efficient production. One strategy aimed at greater efficiency is mutual networking and cooperation on a voluntary basis. Another possibility is provided by integration through ownership arrangements such as cross ownership. A third possibility is for large media companies to buy out smaller operators in the media industry. All of these three strategies are in active use.

Buying up a new media company is the easiest way for a traditional operator to expand its area of expertise. One example of a company that has expanded through takeovers is Talentum, who publish business and technology magazines. Talentum now owns Finland's biggest new media company, Interaktiivinen Satama. (Table 5.)

On the other hand, the major media companies are aiming to reorganize their new media operations into smaller independent units. This is the case in Alma Media, for instance.

These changes are all part of a more sweeping process of restructuration in the media field in response to the arrival of digital media. The traditional borderlines between different branches are being eroded. It seems quite likely that we will see these changes continue and indeed accelerate over the next few years.

Finnish new media companies are still comparatively small. In 1998 even the biggest new media company in Finland had a turnover of no more than around FIM 30 million; companies that ranked between second and tenth largest had a turnover in the range of FIM 8–17 million. (Table 5.)

It is important to stress that most companies in the so-called new media industry are not in fact directly involved in what is traditionally defined as mass communication. Much of what they do is best described as organizational or marketing communication, which in the traditional printing industry is perhaps most closely represented by advertising materials. Other important areas include logistics and customer management systems, banking and investment services as well as web trading solutions. It can be estimated that in 1998 no more than 15–25 per cent, at most, of the total output of the new media industry could be classified as mass communication proper. (Table 6.)

Information networks

The Internet has grown very rapidly in popularity during the past few years. At year-end 1998, more than one-quarter (28%) of the Finnish population accessed the Internet at least once a week at home, at their place of study or in the workplace. The proportion of daily users was 14 per cent. At the beginning of 1998 it was still somewhat more common for people to get on the Internet at their place of work or study, but by the end of the year use from home was most common. (Table 7.)

Communication over information networks is increasingly being organized along similar lines as are familiar from traditional media such as TV channels: it is packaged and tailored to suit the needs of user groups, even individual users. Indeed there are clear indications that companies operating over the net are interested in forming links and associations with traditional media. On the other hand, the traditional media have also been taking active steps to move into the Internet and many are now leading something of a double life. With the exception of search engines, the most popular WWW sites in Finland are those maintained by traditional media (Table 8).

To an extent surfing the net has now become an everyday activity comparable to television viewing. There is some evidence which suggests that the time people spend on the Internet is time away from the time they spend watching television.

One of the paradoxes of the coexistence of old and new media is that anyone who wants to make known that they have a homepage on the net will usually have to advertise it via traditional print media. Without a campaign in the traditional media, it may be very hard to attract visitors and gain visibility on the net. One estimate says that already in 1997, there were a total of one million homepages on the net, and 1500 new ones were created every day. The competition for attention is fierce indeed. The use of agent technology and webcasting are expected to provide some relief to this problem.

In Finland alone there are on the net around 170 electronic versions of newspapers and magazines. Usually they include only part of the material of the printed paper. On the other hand, some electronic papers have extra material which is not included in the printed version. Most web papers can be accessed free of charge, although some papers want readers to register, which will involve giving some basic information. This helps to give the publisher some idea of their readership. Some web papers are only accessible to subscribers, which makes the service comparable to printed supplements.

The main strategy adopted by the traditional printing industry in the situation of stiffening competition is to develop new products and services of integrated communication. Faced with the threat of classified advertisements moving from newspapers to information networks, the papers are offering to advertise on the net as a supplementary service. These advertisements provide direct links to the advertiser's server so that readers can make bookings and buy products on the net.

Charging readers for web publications is a major hurdle that is set to cause much trouble. It is not easy to fund the service by means of advertising alone. In the United States some papers such as the Wall Street Journal and the New York Times have started to charge a fee for some of their web pages which used to be free, but this has caused a mass exodus of readers. Even if the charges are small and even if people are in principle willing to pay for a service, this is still a big step: at least so far fee-based web services have not managed to make a real breakthrough.

Advertising in web publications is at least equally problematic. In Finland, data published by Gallup Mainostieto indicate that no more than FIM 22 million was spent on web advertising in 1998, which is less than half a per cent of the total volume of media advertising. A major obstacle to the further growth of advertising is the ambiguity of the concepts of 'circulation' and 'reader'. No one has as yet been able to offer a clear-cut definition for the circulation of a web paper, and consequently methods of measurement vary widely.

The equation then remains unsolved. Nonetheless more and more papers have decided to go into cyberspace and are now developing their own web versions. They are doing so not only in the hope that this can some day become a profitable business, but also because they want to ward off any possible new rivals as early as possible.

The latest trends in the development of television technology are also leading towards integration. Set-top boxes have now been launched in Finland as well, allowing viewers to use the television set to link up with the Internet via remote control – the obvious idea being to make the Internet more accessible. The set-top box costs around FIM 2000–2500, which is much less than the price of a PC and modem; on the other hand, there is also a considerable difference in performance. There is also a monthly fee of FIM 50–100 depending on what kind of package the subscription includes.

Quite extensive tests have been run on the performance of subscription video systems (VOD, Video On Demand) and interactive television services in Finland since 1994. As yet, however, this work has produced no finished products for the mass markets.

CD-ROM

In 1997 CD-ROMs still accounted for no more than FIM 200 million or about one per cent of the turnover of the mass media in Finland. During the past couple of years market growth has been clearly slower than expected. As far as CD-ROM games are concerned this is often explained by the revival of television games as well as by pirating. As regards multimedia CD-ROMs, it seems that growth is hampered by two major factors, i.e. pirating and free and ready access to high-quality encyclopaedic material on the Internet.

A good indicator of the penetration of a new product into the mass market is the decision by supermarkets to have it on their shelves. In Finland supermarkets have now been selling CD-ROMs for the past two-three years.

In 1997 multimedia products accounted for 35 per cent of the total CD-ROM market, with games accounting for the remaining 65 per cent (excluding playstation programs). Encyclopedias and reference books are particularly well-suited for use on CD-ROM because of the PC's quick search facility. Indeed the top-selling item in the annual spring sale of a major bookstore chain in 1997 was a reference book in CD-ROM format.

Foreign material accounts for the bulk of CD-ROM sales in Finland. Estimated on the basis of statistics published by the Finnish Book Publishers' Association, domestic material accounts for about one-quarter of total sales. In 1998 sales by the Association's member companies (in wholesale value) were around FIM 30 million (Tables 10 & 11).

In the category of multimedia products, it is estimated that domestic products account for over half of total sales. Only a few per cent of game products are Finnish-made or translated into Finnish.

One of the difficulties with CD-ROM sales is that games in particular are always designed to the performance of the most powerful PCs currently available. It is not uncommon for home users to find that the top-of-the-range CD-ROMs do not run properly on their PCs. This is a vicious circle that may discourage some potential users altogether. It may also go some way towards explaining the strong revival of sales of playstations and console games (Nintendo, Sega, Sony).

DVD

The storage capacity of the digital versatile disc or DVD is several times greater than that of the CD-ROM system. DVD will hold a full-length feature film, for instance. Indeed the new system has initially been marketed as a replacement of VCR. However, DVD can be used for the storage of all kinds of digital data. It therefore has great potential not only in the consumer market but also in professional use and as a replacement of CD-ROM stations.

In Finland it is expected that initially DVD equipment will begin to gain ground in the PC environment. Sales of separate DVD equipment got under way in Finland in 1998, but since the system cannot be used for recording purposes it has not yet emerged as a real alternative to current VCRs – which is how it has been marketed. Also the range of films currently available on DVD was no more than around one hundred at end-1998.

Tuomo Sauri

Figures

Tables

10.1 Penetration of selected household equipment 1990 – 1998

Year	VCR %	CD player	PC	Mobile phone	CD-ROM	Modem	Internet
1990	45	11	8	7	..	..	..
1994	59	31	17	13	..	5	..
1995	61	36	19	18	..	7	..
1996	62	45	23	42	12	10	7
1997	71		35	63	21	16	13
1998	71	61	38	73	27	21	19

Source: Statistics Finland, Household surveys and consumer barometers

10.2 Access to information technology 1998 (Spring)

Do you have access to, or do you use (from home, from workplace, from place of study)...

	Finland	EU15
A computer	44	35
A CD-ROM-reader	25	21
A modem	23	12
The Internet or the WWW	31	12

Source: Eurobarometer, Report N.o. 49(1998)

10.3 Use of electronic services at home and at work or place of study (September 1998)

	At home %	At work or place of study
Uses Internet connection, total	13	30
Communication services	9	21
E-mail	9	20
Bulletin boards, newsgroups	2	4
Electronic information services	11	24
Topics of respondents' own interest	11	21
Documents, newspapers, newsletters	6	13
Public institutions	..	14
Online databases and other EIS	..	11
Transaction services	10	12
Electronic banking	8	7
Real-time financial information	..	4
Electronic shopping	2	2
Software downloading	5	6
Booking of tickets	2	..
Entertainment services	2	..
Education services	2	5
Other services	1	3

Source: Statistic Finland's Labour force survey

10.4 Turnover of new media production in Finland 1995 – 1998

	FIM million
1995	65
1996	245
1997	490
1998	700

Sources: Helsinki School of Economics
University of Art and Design Helsinki

10.5 Top ten companies in new media production 1998

Company	Turnover FIM million	Personnel
Interaktiivinen Satama	31	121
Nedecon	17	60
Grey Interactive	15	47
Visual Systems	14	17
Tietovalta	12	57
PartnerGroup	10	21
Terra Nova Visuals	10	25
Yomi Media	9	40
Sarajärvi & Hellen	8	15
Aventura Systems	8	25
Top ten, total	134	428

Source: <http://www.talouselama.fi/>

10.6 Breakdown of new media turnover 1998

	%
External corporate communications (e.g. organizational/marketing communication)	38
Internal corporate communications (e.g. intranet, extranet solutions)	18
Network content production	11
Electronic commerce	11
Software products	10
Digital educational materials	5
Network operator services*	5
3D design	1
Computer game production	1
Total	100
Total, FIM million	700

** Network operator services are included only in so far as they are part of the activities of new media companies proper.*

Source: Helsinki School of Economics &
University of Art and Design Helsinki

10.7 Changes in Internet use 1995 – 1998

	1995 Nov.-Dec. %	1996 Oct.-Nov.	1997 Oct.Nov.	1998 Oct.-Nov.	% Change 98/97
At least sometimes	9.7	19.5	29.0	38.0	31
At least once a week	5.5	10.9	18.5	28.3	53
On a daily/nearly daily basis	1.9	4.5	8.1	14.0	73
Weekly from home	1.6	4.7	7.5	13.9	85
Weekly from workplace	2.4	5.3	8.2	13.3	62
Weekly from place of study	2.5	4.8	7.0	8.6	23

Source: Taloustutkimus, Internet Tracking

10.8 Top ten Finnish WWW services (In alphabetical order)

Alta Vista	Search engine
Eemeli	Search for e-mail addresses
Ihmemaan haku	Search engine
Iltalehti	Afternoon tabloid homepages
Ilta-Sanomat	Afternoon tabloid homepages
iNet Haku/iNetKeskuskatu (Tele)	Web pages of Internet service provider
Keltainen Pörssi	*Classified advertising magazine*
Kolumbus (Finnet-yhtiöt)	Web pages of Internet service provider
MTV3	Commercial TV company homepages
The Finnish Broadcasting Company YLE	Public service TV & radio company homepages

Based on a follow-up study of 50 company homepages plus 15 portals and search engines.

Source: Taloustutkimus (November 1998)

10.9 Number of Internet newspapers and magazines 1997 & 1998 (Autumn)

	No. of titles 1997	1998
Newspapers	**33**	**50**
– dailies	22	34
– non-dailies	11	16
Magazines	**91**	**116**
– consumer magazines	26	27
– trade and business magazines	36	62
– opinion journals	8	4
– scientific journals	..	6
– student magazines	14	14
– other magazines	7	3

Note. Homepages providing at least some news/editorial material.

Sources: http://www.sanomalehdet.fi/fi/linkit/index.shtml
http://www.journalistiliitto.fi/maailmalle/lehdet.html

10.10 Sales of CD-roms 1994 – 1997

	FIM million	%
1994	20	
1995	50	
1996	150	
1997	200	
Of which 1997		
– games	130–135	ca. 65
– multimedia products	70–75	ca. 35

Source: Company information
Statistics Finland

10.11 CD-roms and other off-line multimedia products: number and sales of domestic titles 1995–1997

	1995		1996		1997		1998	
Titles	Titles	%	Titles	%	Titles	%	Titles	%
Education	11	19	19	28	70	54	42	25
Non-fiction	10	17	39	57	52	40	92	54
Fiction, entertainment	38	64	11	16	8	6	36	21
Total	59	100	69	100	130	100	170	100
Sales	FIM million	%	FIM million	%	FIM million	%	FIM million	%
Education	0.4	5	3.6	22	6.7	22	1.2	4
Non-fiction	5.1	64	11.4	70	22.8	74	24.0	73
Fiction, entertainment	2.5	31	1.2	7	1.4	4	7.5	23
Total	8.0	100	16.2	100	30.8	100	32.7	100

Production and sales by members of the Finnish Book Publishers´ Association.
Sales at distributor level.

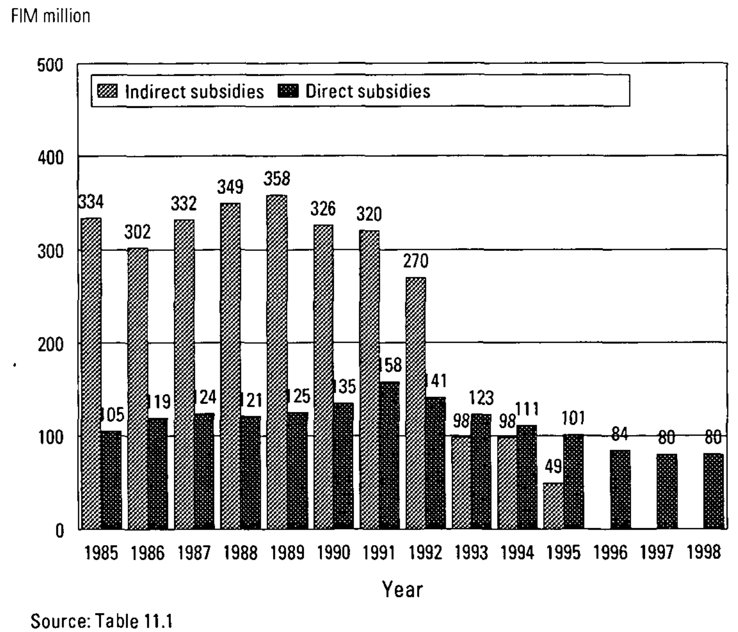
Source: The Finnish Book Publishers´ Association

11 Government subsidies for the mass media

Government subsidies for the mass media go primarily to three sectors, i.e. newspapers, books and films. Public support to all other sectors is very limited. The support is provided in different forms, including business and project subsidies, arts grants, target scholarships, and artist awards.

Subsidies for newspapers and magazines have been sharply reduced during the 1990s. At the beginning of the decade a total of almost FIM 500 million was paid out in subsidies, in 1998 the figure was down to FIM 79 million (Table 1 and Figure 1). The biggest cutbacks have been made in indirect support for the print press: that was completely discontinued in 1996. Indirect support consisted of reduced postage for newspapers and magazines, for which the Post Office received compensation from the State. In 1990 a total of more than FIM 300 million was spent on this form of subsidy. The sum dropped to less than one-fifth before it was discontinued. Prior to this decision the subsidy was restricted to the delivery of non-profitable papers mainly in rural areas. Two-thirds of the delivery subsidies went to newspapers and local papers, one-third to magazines (Table 2).

Figure 11.1 Government subsidies to the print press 1985 – 1998



Source: Table 11.1

Direct government subsidies to the print press have also steadily decreased during the 1990s. In 1998 a total of FIM 79 million was paid out, approximately half of the figure for the early part of the 1990s. One form of direct support, i.e. subsidies for newspapers within joint delivery schemes, was discontinued in 1996. This subsidy was made available for purposes of covering delivery costs and for the development of joint delivery systems. (Table 1.)

In 1998 there were three different forms of government support for the print press: selective press subsidies granted by the Council of State, press subsidies for political parties and subsidies for culture papers. The Council of State has granted selective press subsidies for purposes of lowering newspapers' transport, delivery and other costs, for development projects and for supporting news agencies. The amount of money paid out in these subsidies has declined during the 1990s; in 1998 the sum was down to FIM 40 million.

Party subsidies are granted to the organs of political parties represented in Parliament and to the County of Åland to support information and communication. Amounting to a total of FIM 35 million in 1998, the subsidy is divided among the political parties on the basis of their relative strength in Parliament.

There used to be a separate support mechanism for religious papers and opinion journals, but in 1994 these subsidies were combined into a subsidy for culture papers. In value terms this is the smallest type of subsidy granted to the print press, but on the other hand it is the only form of support that has increased during the past ten years. In 1998 a total of FIM 4.5 million was paid out in support for culture papers (Table 1.)

Government literature subsidies consist for the main part of different kinds of grants awarded to writers. Subsidies are also paid out to publishers, to organizations active in the literature field and for the promotion of literature in general. (Table 3.)

In 1997 a total of FIM 23 million was paid out in authors' subsidies, half of which consisted of authors' library fees and the other half of various arts grants and project grants. The authors' library fee system can be described as royalties paid by the government to authors whose works are available in public libraries. The library fees are not, however, tied to the number of titles available in library collections or to how many times titles have been borrowed. Each year 10 per cent of the money reserved for libraries' new acquisitions are allocated in the State Budget to this purpose. (Table 3.)

Other forms of literature subsidies are considerably smaller than authors' grants. For example, subsidies for the publication and distribution of books amounted to no more than FIM 3.4 million in 1997. (Table 3.)

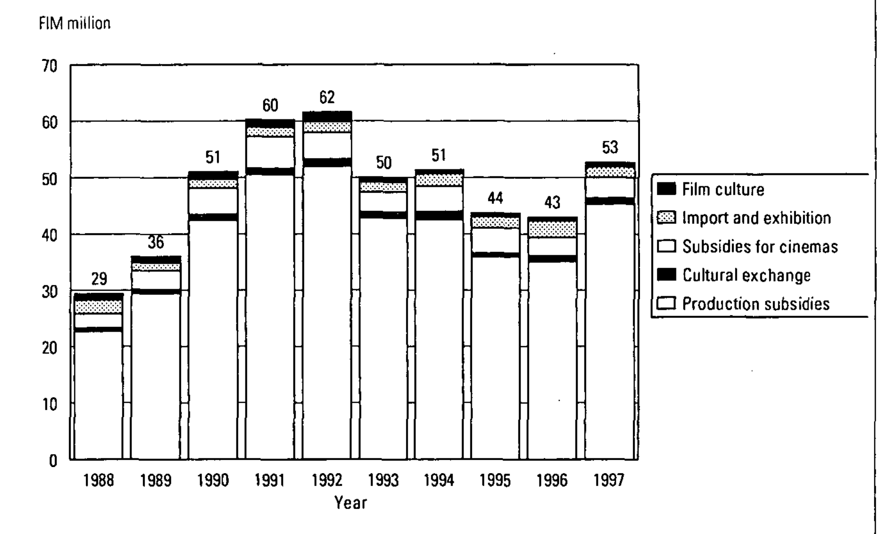
The bulk of government subsidies to public libraries can be seen as support for book distribution, although the continuing diversification of library services means that videos and phonograms are now also getting more support. The annual amount of government subsidies to public libraries totals around FIM 500 million, of which some 90 per cent goes towards overheads and the rest towards initial outlays. The sums have been declining since the peak year of 1992, when government library subsidies amounted to FIM 782 million. (Table 4.)

State subsidies for films include subsidies granted mainly to companies for film production, distribution and presentation, as well as arts grants to individual professionals engaged in film-making. Part of the subsidies go to the promotion of film culture and organizations active in this field.

Subsidies for film production and distribution as well as subsidies for cinemas are channelled mainly through the Finnish Film Foundation. In addition, film production companies may receive quality support which is distributed by the National Council for Cinema to domestic films. In 1997, the amount of subsidies and grants distributed by the Finnish Film Foundation totalled FIM 53 million, of which 45 million was for production. Government subsidies to the Finnish Film Foundation were cut quite drastically in the early 1990s, but the situation has been improving during the past few years. Annual subsidies for film production were increased by a total of FIM 9 million in the State Budgets for 1997 and 1998. There are also plans to channel a further FIM 12 million from TV licence revenues into audiovisual production, including film production. (Table 6 and Figure 2.)

The organization of the Finnish Film Foundation was overhauled in 1996 in connection with administrative rearrangements and changes in subsidy allocation procedures. The Foundation's Administrative Council was abolished and ultimate authority transferred to the Board of Directors. The committee of film industry ex-

Figure 11.2. Grants and subsidies from the Finnish Film Foundation 1988 – 1997



Source: Table 11.6

perts that was responsible for the allocation of production subsidies was also abolished; this task is now the responsibility of the Foundation's Production Manager. At the same time it was decided that the Foundation' Managing Director shall no longer be allowed to hand out monies, although all funding decisions still have to be endorsed by the Managing Director. No major changes were made to the different types and forms of production subsidy.

Government subsidies to artists in the film industry are at a markedly lower level than the production and other subsidies allocated through the Finnish Film Foundation. Having said that, the majority of the subsidies allocated by the Finnish Film Foundation is targeted to professionals in the form of job opportunities. The forms of subsidies allocated to artists in the film industry are the same as in other fields: mainly arts grants of various duration, project grants and prizes. Government arts grants for artists in the film industry amount to a few million marks per annum. (Table 5.)

Support for the Finnish film industry is also channelled through international film funds in which Finland is involved. The most important of these funds are the Nordic Film and TV Fund, the Council of Europe Eurimages Fund and the European Union's Media II Programme.

In 1997 the Nordic Film and TV Fund granted a total of around FIM 4.5 million for the production of Finnish long and short films. In the same year, support from Eurimages amounted to about FIM 1.8 million. This is the sum total allocated to Finnish films: part of the money goes to foreign companies involved in co-productions. In 1997 a total of FIM 4.8 million was received through the Media II Programme for the development, distribution and marketing of Finnish films.

Collective copyright and royalties

In the 1970s and 1980s there was a growing movement towards collective copyright and royalty arrangements, which increasingly came to resemble public support mechanisms in terms of their administration and distribution. However, collective royalties are in essence compensations paid out to individual authors etc. rather than public subsidies.

One of the most important sources of collective royalties is the cassette fee, which is added to the price of blank audio cassettes and discs as well as blank video cassettes. The fee for blank audio cassettes, MiniDiscs and CDs that can be recorded an unlimited number of times is 3 p/min[1]. The fee for CDs that can only be

[1] 1 FIM = 100 penni (p)

recorded once is 1.5 p/min and for videos 4.5 p/min. The fee for computer-recordable CDs is 0.3 p/min.

In 1997 net revenues from the cassette fee totalled FIM 54 million (Table 7). The revenues declined during the early 1990s following on a decision to reduce the per minute fee, various evasion strategies and the economic recession, but in recent years they have been increasing again.

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, the remaining two-thirds is allocated through copyright organizations for purposes of promoting films, videos, phonograms, music, literature and arts. (Table 8.)

A major source of support for video production and distribution has been the Promotion Centre for Audiovisual Culture in Finland (AVEK), whose grants are largely funded by cassette fees. Part of the Film Foundation grants for video production also come from the same source. Subsidies for phonogram production granted by the Finnish Performing Music Promotion Centre (ESEK) are also partly funded through cassette royalty fees (Tables 9 and 10).

Compensation for photocopying is another form of royalty linked with mass communication. The revenue from these compensations is distributed via the member organizations of Kopiosto, a joint organization for the administration of copyrights. In 1997 a total of around FIM 25 million was collected from administration, schools, enterprises and other organizations as compensations for photocopying. (Tables 11 and 12.)

Statistical sources

Appropriations for public support of the mass media are listed in the State Budget as well as in the national accounts (under various sub-items of the Ministry of Education and Ministry of Transport and Communications main divisions).

Information on the use of appropriations for culture and communication within the jurisdiction of the Ministry of Education is published in the annual reports of the Central Arts Council and the Council's journal Arsis.

The Finnish Film Foundation gives details on the breakdown of film subsidies to different projects in its annual reports.

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.

Rauli Kohvakka

Figures

Tables

11.1 Government subsidies to the printed press 1980 – 1998

Type of subsidy	1980 FIM million	1980 %	1985 FIM million	1985 %	1990 FIM million	1990 %	1991 FIM million	1991 %	1992 FIM million	1992 %	1993 FIM million	1993 %
Selective press subsidies*												
– from Council of State	32	11.4	45	10.2	66	14.3	73	15.3	69	16.8	62	28.1
– *through political parties*	32	11.4	45	10.2	45	9.8	49	10.2	43	10.5	38	17.2
– subsidies for news agencies**	3	1.0	5	1.0	6	1.3	7	1.4	4	1.0	–	–
Subsidies for joint newspaper delivery systems	1	0.1	7	1.5	16	3.4	24	5.0	20	4.9	18	8.1
Subsidies for opinion journals	1	0.3	1	0.3	2	0.5	3	0.5	2	0.6	2	1.1
Subsidies for religious journals	1	0.5	2	0.3	2	0.4	2	0.4	3	0.6	2	1.1
Direct press subsidies total	70	24.7	105	23.5	135	29.3	158	33.0	141	34.3	123	55.6
Transport subsidies***	210	74.9	334	76.1	326	70.7	320	67.0	270	65.7	98	44.3
Total	280	100.0	439	100.0	461	100.0	478	100.0	411	100.0	221	100.0

11.1 Continued

Type of subsidy	1994 FIM million	1994 %	1995 FIM million	1995 %	1996 FIM million	1996 %	1997 FIM million	1997 %	1998 FIM million	1998 %
Selective press subsidies*										
– from Council of State	55	26.3	45	30.0	45	53.9	40	50.3	40.0	50.3
– through political parties	35	16.7	35	23.3	35	41.9	35	44.0	35.0	44.0
– subsidies for news agencies**	–	–	–	–	–	–	–	–	–	–
Subsidies for joint newspaper delivery systems	17	8.1	17	11.3	–	–	–	–	–	–
Subsidies for opinion journals Subsidies for religious journals	4	1.9	4	2.7	3.5	4.2	4.5	5.7	4.5	5.7
Direct press subsidies total	111	53.1	101	67.3	83.5	100.0	79.5	100.0	79.5	100.0
Transport subsidies***	98	46.9	49	32.7	–	–	–	–	–	–
Total	209	100.0	150	100.0	83.5	100.0	79.5	100.0	79.5	100.0

* *Money to subsidize transport, delivery and other costs.*

** *Money to subsidize telecommunications costs of news agencies and their clients.*

*** *The subsidies was paid to the Posts for delivery costs. In 1994 the subsidy was redefined as compensation for newspaper deliveries in rural areas. Transport subsidies were abolished in 1996.*

Sources: State Budgets and final accounts

11.2 Breakdown of transport subsidies by type of paper 1980 – 1995*

Type of paper	1980		1985		1986	
	FIM million	%	FIM million	%	FIM million	%
Newspapers	135	64.3	213	63.7	183	60.6
Local papers	13	6.2	24	7.1	24	7.9
Magazines & periodicals	62	29.5	97	29.0	95	31.4
Total	210	100.0	334	100.0	302	100.0

11.2 Continued

Type of paper	1987		1988		1989*		1990	
	FIM million	%	FIM million	%	FIM million	%	FIM million	%
Newspapers	204	61.4	214	61.4	229	64.2	222	68.1
Local papers	27	8.1	29	8.3	45	12.6	34	10.4
Magazines & periodicals	101	30.4	106	30.4	83	23.3	70	21.5
Total	332	100.0	349	100.0	357	100.0	326	100.0

11.2 Continued

Type of paper	1991		1992		1994		1995	
	FIM million	%	FIM million	%	FIM million	%	FIM million	%
Newspapers	208	65	161	59.7	57	58.2	28	57.4
Local papers	38	12	40	14.7	10	10.2	5	10.9
Magazines & periodicals	74	23	69	25.6	31	31.6	15	30.7
Total	320	100	270	100.0	98	100.0	49	100.0

* *Transport subsidies were abolished in 1996. The subsidies were paid to the Posts /Suomen Posti Oy 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: Finland Post
Magazine committee report (1988), Ministry of Communications

11.3 Government subsidies to the literature 1995 – 1997

	1995		1996		1997	
	FIM thousand	%	FIM thousand	%	FIM thousand	%
Production/distribution	**2 960**	**9.5**	**2 800**	**9.5**	**3 400**	**10.8**
Promotion of fiction	200	0.6	190	0.6	190	0.6
Translation and publication of Finnish literature	900	2.9	900	3.1	1 000	3.2
Publication subsidies	610	2.0	560	1.9	560	1.8
Purchasing subsidies	1 100	3.5	1 000	3.4	1 500	4.8
Publication of easy-to-read books	150	0.5	150	0.5	150	0.5
Promotion/Information	**2 073**	**6.6**	**2 042**	**7.0**	**2 083**	**6.6**
Promotion of reading and writing	700	2.2	700	2.4	730	2.3
State subsidies by regional arts councils	333	1.1	302	1.0	313	1.0
The Finnish Literature Information Centre	700	2.2	700	2.4	700	2.2
Finnish Institute for Childrens' Literature	340	1.1	340	1.2	340	1.1
Writers' associations	**1 200**	**3.8**	**1 180**	**4.0**	**1 180**	**3.7**
Artists	**22 695**	**72.6**	**22 664**	**77.3**	**23 103**	**73.2**
Finland prizes	380	1.2	100	0.3	380	1.2
Authors' library fees	12 530	40.1	12 263	41.8	12 342	39.1
Project grants*	288	0.9	283	1.0	287	0.9
Government arts grants	8 376	26.8	8 847	30.2	8 927	28.3
Grants from the regional arts councils	1 121	3.6	1 171	4.0	1 167	3.7
Other subsidies	**2 330**	**7.5**	**636**	**2.2**	**1 812**	**5.7**
Total	**31 257**	**100.0**	**29 322**	**100.0**	**31 577**	**100.0**

* *Incl. travel grants and grants for children's culture.*

Sources: The Arts Council of Finland, The Ministry of Education, State budgets and balance sheets.

11.4 Government subsidies to public libraries 1980 – 1998

Type of subsidy	1980	1985	1990	1991	1992	1993	1994	1995	1996	1997	1998
	FIM million										
State subsidies to cover overheads	207	384	621	701	741	607	575	497	512	491	462
State subsidies to cover establishment expenses	20	25	42	40	41	39	35	29	40	38	42
Construction loans	4	11	–	–	–	–	–	–	–	–	–
Total	231	419	663	741	782	646	610	526	552	529	504

Source: State Budgets and final accounts

11.5 Government subsidies to film and cinema 1995 – 1997

	1995		1996		1997	
	FIM thousand	%	FIM thousand	%	FIM thousand	%
Production	**47 100**	**62.6**	**45 300**	**65.5**	**52 300**	**68.2**
Finnish film and programme production and distribution	35 700	47.5	34 400	49.7	41 400	54.0
Quality support	1 400	1.9	1 500	2.2	1 500	2.0
Finnish Film Foundation	7 500	10.0	7 000	10.1	7 000	9.1
Co-funding agreements with TV companies	2 500	3.3	2 400	3.5	2 400	3.1
Distribution	**7 045**	**9.4**	**6 845**	**9.9**	**6 910**	**9.0**
Renovation of cinemas	3 610	4.8	3 440	5.0	3 440	4.5
Regional cinema centres	1 630	2.2	1 570	2.3	1 570	2.0
Promotion of film culture	900	1.2	1 000	1.4	1 000	1.3
Nation-wide cultural events	905	1.2	835	1.2	900	1.2
State subsidies by regional arts councils	**198**	**0.3**	**167**	**0.2**	**147**	**0.2**
Organizations	**1 760**	**2.3**	**1 690**	**2.4**	**1 690**	**2.2**
Finnish Film Archive	**12 875**	**17.1**	**12 504**	**18.1**	**12 792**	**16.7**
Artists	**2 664**	**3.5**	**2 526**	**3.7**	**2 668**	**3.5**
State prizes	240	0.3	100	0.1	150	0.2
Project grants	258	0.3	227	0.3	230	0.3
Government arts grants	1 903	2.5	1 983	2.9	1 984	2.6
Grants from the regional arts councils	263	0.3	216	0.3	304	0.4
Other subsidies*	**3 585**	**4.8**	**139**	**0.2**	**140**	**0.2**
Total	**75 227**	**100.0**	**69 171**	**100.0**	**76 647**	**100.0**

* *Incl. travel grants and grants for children's culture.*

Sources: The Arts Council of Finland, The Ministry of Education, State budgets and balance sheets.

11.6 Grants and subsidies from the Finnish Film Foundation 1990 – 1997

	1990		1991		1992		1993	
	FIM thousand	%	FIM thousand	%	FIM thousand	%	FIM thousand	%
Production subsidies	42 460	83.3	50 462	83.8	51 976	84.4	42 819	85.6
Subsidies for cultural exhange	969	1.9	1 196	2.0	1 304	2.1	1 111	2.2
Subsidies for cinemas	4 644	9.1	5 551	9.2	4 620	7.5	3 496	7.0
Import and presentation	1 567	3.1	1 655	2.7	1 944	3.2	1 705	3.4
Film culture	1 340	2.6	1 347	2.2	1 716	2.8	900	1.8
Total	50 981	100.0	60 210	100.0	61 561	100.0	50 031	100.0

11.6 Continued

	1994		1995		1996		1997	
	FIM thousand	%	FIM thousand	%	FIM thousand	%	FIM thousand	%
Production subsidies	42 558	82.9	35 900	82.2	35 093	81.7	45 218	85.8
Subsidies for cultural exhange	1 410	2.7	655	1.5	1 025	2.4	1 100	2.1
Subsidies for cinemas	4 500	8.8	4 479	10.3	3 248	7.6	3 641	6.9
Import and presentation	2 165	4.2	2 039	4.7	2 957	6.9	1 920	3.6
Film culture	720	1.4	580	1.3	632	1.5	800	1.5
Total	51 354	100.0	43 652	100.0	42 955	100.0	52 679	100.0

Source: Finnish Film Foundation annual reports

11.7 Net returns from blank cassette fee 1985 – 1997*

	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
1993	39.6	26	74
1994	45.2	27	73
1995	39.9	18	82
1996	54.2	18	82
1997	54.1	16	84

* *The fee is collected in accordance with copyright legislation. The fee is revised annually by the Ministry of Education.*

Source: The Finnish Composers' Copyright Society annual reports

11.8 Allocation of blank cassette fee 1988 – 1997

	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
	FIM thousand									
Indirect compensations:										
Promotion Centre for Audiovisual Culture in Finland (AVEK)	4 400	4 600	4 200	2 500	2 700	1 750	1 200	1 500	2 500	1 300
Kopiosto/AVEK	7 500	11 800	12 400	13 500	13 000	11 100	11 800	12 000	13 900	14 000
Finnish Film Foundation	7 000	5 000	3 500	4 800	3 000	2 000	2 000	1 600	1 400	900
Finnish Performing Music Promotion Centre	7 425	7 430	7 400	7 000	5 810	5 150	5 050	3 525	5 380	5 180
Foundation for the Promotion of Finnish Music	4 325	4 200	4 170	3 790	2 650	2 780	2 680	1 240	1 390	1 200
Copyright Information Centre	400	250	250	250	250	255	255	355	405	550
Centre for the Promotion of Finnish Literature	250	650	650	630	570	490	490	400	510	400
Kuvasto: photo copyright					250	200	230	230	250	250
Association for the Deaf	50	50	50	50	50	40	40	40	50	50
Finnish Copyright Association	200	100	100	95	640	515	515	515	630	630
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	1 405	1 668	1 095	1 456	1 231
Total	**39 012**	**39 125**	**39 586**	**36 930**	**30 556**	**25 685**	**25 928**	**22 500**	**27 871**	**25 691**
Direct compensations to copyright holders	19 505	19 563	21 378	19 856	16 248	13 877	19 293	17 413	26 315	28 334

Source: Ministry of Education

11.9 Grants and subsidies from the Promotion Centre for Audiovisual Culture in Finland (AVEK) 1997/1998*

	Applications approved No.	Amount granted FIM thousand	Share of subsidies applied for %
Production subsidies	204	14 953	29
Short films and documentaries	122	9 569	24
Video art and multimedia	47	1 628	34
International co-productions			
Educational subsidies	51	759	24
– Personal grants	43	555	20
– Other educational subsidies	8	204	58
Research and publishing	14	262	15
Festival and other support for audiovisual culture			
Europe subsidies**	89	1 282	37
Total	375	17 944	29

* *Funded through cassette royalty fees.*

** *For preparation of international co-productions and international marketing and distribution of national films.*

Source: Annual report of AVEK 1997-1998

11.10 Grants and subsidies from the Finnish Performing Music Promotion Centre (ESEK) 1998*

	FIM thousand	Light music %	Serious music %	Total %
Phonogram production	3 944	81	19	100
Audiovisual music programmes	2 900	94	6	100
Public appearances **	3 800	54	46	100
Training and education	496	51	49	100
Publishing and other activities	19	100	–	100
Total	11 158			

* *Funded mainly through fees collected from the playing of foreign music in Finland and cassette royalty fees.*

** *Includes FIM 459 000 for international tours of choirs of which 425 000 was paid by the Ministry of Education.*

Source: Annual reports of Gramex, the Copyright Society of Performers and Phonogram Producers in Finland.

11.11 Royalties collected by Kopiosto for photocopying 1985 – 1997

	1985	1990	1992	1993	1994	1995	1996	1997
	FIM thousand							
State/schools*	5 240	6 570	10 867	11 247	11 247	12 747	12 938	13 326
Other shools	–	–	–	–	–	239	1 432	3 352
Public administration	630	770	833	1 294	1 759	1 759	1 785	1 839
Municipal administration	381	726	1 040	1 295	1 282	1 435	1 595	1 712
National Ecclesiastical Board	195	367	418	435	507	586	674	879
Business companies	262	545	707	687	1 866	2 730	2 832	3 739
Others**	–	40	108	166	202	246	281	312
Total	6 708	9 018	13 973	15 124	16 863	19 742	21 537	25 159

* *Copying at schools, universities and in state personnel training.*

** *Since 1988 the sum consists chiefly of fees collected from schools operating on a commercial basis*

Source: Kopiosto annual reports.

11.12 Photocopying royalties paid out by Kopiosto to its member organizations 1998

	FIM thousand	%
Literature	390	1.9
Author organizations	253	1.2
Publisher organizations	136	0.7
Photography	4 311	20.9
Photographer organizations	2 155	10.5
Publisher organizations	2 155	10,5
Print press	5 184	25.2
Journalist organizations	2 462	12.0
Publisher organizations	2 462	12.0
Editor organizations	259	1.3
Music	1 613	7.8
Composer organizations	807	3.9
Publisher organizations	807	3.9
Non-fiction	9 106	44.2
Author organizations	3 642	17.7
Publisher organizations	5 463	26.5
Total	20 603	100.0

Source: Kopiosto annual report

Processed

12 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, data on the number of satellite connections are available from many different sources. The data provided by different sources may vary considerably and must therefore be examined with special caution. Valuable work for improving the comparability of the statistics on audiovisual mass communication has in recent years been done most particularly by the European Audiovisual Observatory and Eurostat, the Statistical Office of the European Communities.

The different criteria of calculation applied in various comparisons may also yield very different results. For instance, the 1995 edition of the TBI Yearbook had three different lists of the biggest media companies, using different sets of criteria in each to rank-order them.

Unesco's Statistical Yearbook is a massive and important source, although it includes only fairly limited comparative data on mass media. The annual statistics of the European Audiovisual Observatory (published since 1994) includes an abundance of information on the finances, structure, reach, usage and advertising of audiovisual mass media.

The annual statistics of the World Association of Newspapers (WAN), the World Press Trends, is the most important international statistical publication in the field. For the part of magazines, the gap of information is partly filled by the World Magazine Trends which is produced by Zenith Media in cooperation with the International Federation of the Periodical Press FIPP.

Nordic Media Trends, published by Nordicom (1995-), is a useful annual source on mass media in the Nordic countries. The latest issue, Nordic Baltic Media Statistics 1998, also covers the Baltic states.

Tuomo Sauri

Sources

The audio-visual sector in the European Economic Area in the 1990s. Eurostat, Statistics in focus, Distributive trades, services and transport 1998/2.

Audio-visual statistics. Report 1995. Eurostat, Luxembourg 1996

Eurobarometer. Public opinion in the European Union. Report number 49. European Commission, Brussels 1998.

The European advertising & media yearbook 1998. NTC Publications, Henley-on-Thames 1998.

European cinema yearbook 1997. MEDIA Salles, Milano 1998.

European marketing pocket book 1999. NTC publications Ltd., Henley-on-Thames 1998.

Laing, D. & Tyler, B.: The European Radio Industry. FT Business Limited, London 1998.

Media trends 1997 in Denmark, Finland, Iceland, Norway and Sweden. Nordicom Sverige, Göteborg 1995.

Navigating in the future media market. Intergraf, Brussels 1998.

Nordic Baltic Media Statistics 1998. Nordicom Sverige, Göteborg 1999.

Sánchez-Tabernero, Alfonso et al.: Media concentration in Europe. The European institute for the Media. Media Monograph No. 16, D üsseldorf 1993.

Statistical yearbook. Cinema, television, video and new media in Europe. Edition 1998. European Audiovisual Observatory, Strasbourg 1997.

TBI yearbook 1995. 21st century publishing, London 1995.

UNESCO statistical yearbook 1998. UNESCO Publishing & Bernan Press, U.S.A 1998.

World magazine trends 1998/99. FIPP - Royal Mail - Zenith Media, Henley-on-Thames 1998.

World press trends 1998. World Association of Newspapers - Zenith Media, Paris 1998.

Tables

12.1 Media market volume in Finland and Europe 1996

	Finland	Europe	Finland	Europe
	ECU Million		%	
Newspapers	963	32 000	33.0	22.4
Magazines	544	21 000	18.7	14.7
Books	378	24 000	13.0	16.8
Printed advertising material	262	13 000	9.0	9.1
TV & Radio	530	35 000	18.2	24.5
Phonograms & CD-roms	140	8 000	4.8	5.6
Video & Cinema	97	10 000	3.3	7.0
Total	2 914	143 000	100.0	100.0

Online services not included.

Sources: Finland: Statistics Finland, Media statistics
Europe: Intergraf

Processed

12.2 The biggest media companies 1997

Rank	Company	Country	Turnover US$ million
The Nordic countries			
1	Bonnier AB[1]	Sweden	1 671
	Bonnierföretagen		1 099
	Tidnings AB Marieberg		573
2	Sanoma - WSOY[2]	Finland	1 364
	Sanoma Corporation		376
	Helsinki Media		212
	WSOY		216
	Rautakirja		657
3	Egmont	Denmark	1 025
4	Schibsted	Norway	758
5	Alma Media[3]	Finland	525
	Aamulehti Group		318
	MTV Finland		208
6	Stenbeck media holdings (MTG)[4]	Sweden	479
7	Aller[5]	Denmark	444
8	SVT	Sweden	437
9	Det Berlingske Officin	Denmark	399
10	DR	Denmark	389
11	YLE	Finland	384
12	NRK	Norway	372
			Turnover, communication US$ million
World			
1	Walt Disney	USA	17 459
2	News Corporation	Australia	13 566
3	Viacom	USA	13 206
4	Time Warner	USA	12 412
5	Bertelsmann	Germany	11 840
6	Sony	Japan	9 872
7	Time Warner Entertainment	USA	7 531
8	Havas	France	6 517
9	Matra Hachette	France	6 448
10	ARD	Germany	6 295
11	Polygram	Netherlands	5 686
12	Seagram	Canada	5 455

1 *Bonniers' media volume. 'Media volume' represents 92% of the group's total volume. A fusion of Bonnierföretagen AB and Tidnings AB Marieberg took place in 1998.*

2 *Pro forma turnover 1997. A fusion of Sanoma, Helsinki Media, and WSOY took place in May 1999. Rautakirja Oy, a major distributor of periodicals and books and owner of Finland's largest cinema chain, is included as a subsidiary.*

3 *Pro forma turnover 1997. A fusion of Aamulehti and MTV to form Alma Media took place in April 1998.*

4 *In addition to Modern Times Group, media interests of Kinnevik (TV1000 and Airtime) and Netcom (Kabelvision) are included. All companies are controlled by Jan Stenbeck.*

5 *Figures for 1996/97.*

Sources: Company annual reports.
Nordic Baltic Media Statistics 1998
IDATE
European Audiovisual Observatory

Processed

12.3 Breakdown of advertising by media in Europe 1986 – 1996

Year	Newspapers %	Magazines	Television	Radio	Cinema	Outdoor	Total
1986	44.3	24.2	21.6	4.1	0.7	5.1	100
1987	45.3	23.9	21.1	3.8	0.7	5.2	100
1988	45.1	23.2	21.9	4.1	0.7	5.1	100
1989	44.7	23.1	22.3	4.1	0.7	5.2	100
1990	43.9	22.6	23.3	4.1	0.7	5.3	100
1991	43.2	21.9	24.8	4.1	0.6	5.4	100
1992	41.8	21.1	27.1	4.2	0.6	5.2	100
1993	41.7	19.5	28.3	4.6	0.7	5.3	100
1994	41.4	18.6	29.4	4.7	0.7	5.2	100
1995	40.9	18.6	29.7	4.8	0.7	5.2	100
1996	40.2	18.7	30.2	5.0	0.7	5.3	100

The figures include media costs, agency commission and press classified advertising.
Source: EAT/MDC-Helsinki Group

12.4 Distribution of adspend and advertising as a percentage of GDP 1996

Country	Newspapers %	Magazines	Television	Radio	Cinema	Outdoor	Total	of GNP
Austria	45.6	17.5	20.9	9.7	–	6.4	100	0.73
Belgium	26.4	23.3	32.2	8.1	1.3	8.7	100	0.64
Denmark	61.9	13.8	19.5	1.9	0.7	2.1	100	0.86
Finland*	**58.6**	**14.7**	**20.4**	**3.3**	**0.1**	**3.0**	**100**	**0.88**
France	24.4	22.8	33.5	7.0	0.6	11.6	100	0.66
Germany	48.1	19.4	23.8	4.1	1.0	3.6	100	0.91
Greece	18.6	21.2	52.0	5.8	–	2.4	100	0.79
Ireland	56.9	4.7	25.2	7.8	0.7	4.7	100	0.87
Italy	21.0	16.4	56.7	3.3	–	2.6	100	0.50
Netherlands	49.8	22.3	18.9	4.9	0.4	3.7	100	0.89
Portugal	14.0	17.1	53.2	7.0	0.2	8.5	100	1.17
Spain	31.5	15.6	37.7	9.8	0.8	4.6	100	0.82
Sweden	61.7	12.4	18.4	2.4	0.7	4.4	100	0.77
United Kingdom	40.9	18.3	32.7	3.5	0.7	3.9	100	1.20
EU members	39.9	18.9	30.7	4.9	0.7	4.9	100	..
Norway	60.1	11.3	17.5	8.7	0.4	1.9	100	0.73
Switzerland	55.0	18.5	9.4	2.8	1.1	13.3	100	0.92
Japan	30.0	9.6	42.3	5.1	..	13.1	100	0.79
USA	37.3	12.5	37.8	11.4	..	1.1	100	1.35

The figures include media costs, agency commission and press classified advertising.
* *Figures for Finland differ from ones presented elsewhere in this book.*

Source: EAT/MDC-Helsinki Group

12.5 Dailies: circulation per 1 000 inhabitants 1990 – 1997

Country	1990	1997
EU		
Austria	354	296
Belgium	179	158
Denmark	352	304
Finland	**558**	**454**
France	165	153
Germany*	333	306
Greece**	105	69
Ireland	183	152
Italy	118	103
Luxembourg	313	289
Netherlands	313	305
Portugal	38	68
Spain	76	107
Sweden	528	438
United Kingdom	390	314
Iceland	374	365
Norway	611	587
Switzerland	..	385
Bulgaria	..	152
Croatia	..	105
Cyprus	..	81
Czech Republic	460	202
Estonia	523	178
Hungary	..	170
Latvia	234	115
Lithuania	..	101 (1996)
Poland	..	113
Russia	519	..
Slovak Republic	284	188
Japan***	580	580
USA	249	209

* *1990 statistics refer to West Germany only.*

** *Newspapers published in Athens only.*

*** *Includes sundays.*

Sources: Word Press Trends
Nordic Baltic Media Statistics 1998

12.6 Consumer magazines: net reach 1995/96

	Any consumer titles %
EU	
Austria	83
Belgium	88
Denmark	99
Finland	**97**
France	95
Germany	97
Greece	63
Ireland	35
Italy	71
Netherlands	98
Portugal	49
Spain	55
Sweden	90
United Kingdom	87
Norway	90
Switzerland	69
Bulgaria	31
Czech Republic	76
Estonia	53
Hungary	80
Poland	83
Russia	10
Slovak Republic	88

Source: European Advertising & Media Yearbook 1998

12.7 Book production 1990 – 1996

	Titles/10 000 population			
	1990		1996	
EU				
Austria	5	(1991)	10	
Belgium	12		..	
Denmark	22		24	
Finland	**20**		**26**	
France	7		6	(1995)
Germany	10		9	
Greece	3		4	
Italy	4		6	
Luxembourg	10		17	(1994)
Netherlands	9		22	(1994)
Portugal	6		8	
Spain	9		12	
Sweden	14		15	
United Kingdom	..		18	
Iceland	59		57	
Norway	9		16	
Switzerland	21		22	
Albania	1		..	
Belarus	3		4	
Bulgaria	4		6	
Croatia	..		4	
Czech Republic	..		10	
Estonia	10		18	
Hungary	8		9	
Latvia	6		8	
Lithuania	..		10	
Macedonia	..		4	
Moldova	..		2	
Poland	3		4	
Romania	1		3	
Russia	2		3	
Slovakia	..		7	
Slovenia	..		17	
Ukraine	1		1	
Yugoslavia	4		5	
Japan	..		5	
USA	2		3	

Data do not include school textbooks (Austria, Norway, USA), pamphlets (Greece, Japan, Netherlands, USA), and government publications (Norway, USA). Figures for Japan cover first editions only.

Sources: Unesco Statistical Yearbooks 1992, 1998

12.8 Audience shares of domestic public tv broadcasting 1990 – 1997

	1990	1997
	%	
EU		
Austria	77	62
Belgium (Fl.)	28	27
Belgium (Fr.)	26	18
Denmark	92	69
Finland	**58**	**48**
France	34	40
Germany	68	41
Greece	28	10
Ireland	68	53
Italy	51	48
Netherlands	56	35
Portugal	100	39
Spain	74	34
Sweden	83	48
United Kingdom	48	53
Iceland	61	50
Norway	..	43
Switzerland	30	41
Japan	32	..
USA	4	..

Sources: Eurodata TV, Mediametrie Audience Report 1997
European Audiovisual Observatory Statistical Yearbook ´98
Nordic Baltic Media Statistics 1998
The Finnish Broadcasting Corporation YLE

12.9 Cable TV connections* 1990 – 1997

Country	Share of households % 1990	1997
EU		
Austria	22	35
Belgium	92	95
Denmark	38	51
Finland	**31**	**37**
France	2	10
Germany	24	53
Greece	..	0
Ireland	39	52
Italy	..	0
Luxembourg	80	92
Netherlands	85	93
Portugal	..	7
Spain	1	3
Sweden	34	40
United Kingdom	1	10
Iceland	22	26
Norway	..	44
Switzerland	64	81
Latvia	..	17
Czech Republic	..	21
Estonia	..	32
Hungary	..	56
Poland	0	28
Slovakia	..	22
Slovenia	..	39
Japan	..	32
USA	61	67

* *In many cases the figures also include satellite master antenna systems (SMATV).*

Sources: Screen Digest 3/1997, 5/1998
Nordic Baltic Media Statistics 1998

12.10 Satellite TV reception 1990 – 1997

	Share of households %	
	1990	1997
EU		
Austria	1	50
Belgium	0	3
Denmark	18	37
Finland	**2**	**12**
France	0	11
Germany	3	31
Greece	0	6
Ireland	2	10
Italy	0	4
Luxembourg	..	13
Netherlands	1	4
Portugal	1	11
Spain	0	10
Sweden	3	18
United Kingdom	5	18
Iceland	..	6
Norway	4	18
Switzerland	0	13
Czech Republic	0	15
Estonia	–	..
Hungary	0	22
Poland	..	16
Romania	..	8
Slovakia	–	34
Slovenia	–	22
Japan	..	27
USA - USA	..	9

Most of the figures are estimates.

Sources: Screen Digest 3/1997, 5/1998
Nordic Baltic Media Statistics 1998

12.11 Public service radio: share of total listening time 1990 – 1997

	1990	1997
	%	
EU		
Austria	92	88
Belgium (Fl.)	73	87
Belgium (Fr.)	40	40
Denmark	68	70
Finland	**65**	**64**
France	22	25
Germany	72	52
Greece	25	10
Ireland	62	47
Italy	46	33
Netherlands	87	42
Portugal	32	20
Spain	19	22
Sweden	96	66
United Kingdom	68	49
Iceland	73	54
Norway	75	60
Swizerland	64	50
Japan	43	..
USA	2	..

Sources: Media Concentration in Europe
The European Radio Industry
Nordic Baltic Media Statistics 1998

12.12 Video software revenue: shares of rental and sell-through 1991 – 1997

Country	1991		1997	
	Rental	Sell-through	Rental	Sell-through
	%		%	
EU				
Austria	61	39	34	66
Belgium	57	43	34	66
Denmark	70	30	44	56
Finland	**72**	**28**	**34**	**66**
France	28	72	15	85
Germany	61	39	43	57
Greece	..	..	69	31
Ireland	78	22	67	33
Italy	30	70	25	75
Luxembourg	50	50	32	69
Netherlands	68	32	46	54
Portugal	77	23	33	67
Spain	71	29	31	69
Sweden	86	14	48	52
United Kingdom	55	45	32	68
Iceland	..	..	81	19
Norway	93	7	58	42
Switzerland	62	38	35	65
Japan	80	20	69	31
USA	70	30	54	46

Sources: Screen Digest 5/1995, 8/1998, 11/1998

12.13 Cinema admissions per person 1990 – 1997

	1990	1997
EU		
Austria	1.3	1.7
Belgium	1.7	2.1
Denmark	1.9	2.1
Finland	**1.2**	**1.2**
France	2.2	2.5
Germany	1.6	1.7
Greece	1.3	1.0
Ireland	2.1	3.2
Italy	1.6	1.8
Luxembourg	1.4	2.0
Netherlands	1.0	1.2
Portugal	1.0	1.3
Spain	2.0	2.7
Sweden	1.8	1.7
United Kingdom	1.7	2.4
Iceland*	8.4	5.4
Norway	2.7	2.5
Switzerland	2.1	2.3
Bulgaria	5.3	0.2
Czech Republic	..	0.9
Estonia	7.1	0.7
Hungary	3.4	1.8
Latvia	7.5	0.4
Poland	1.0	0.6
Romania	4.4	0.4
Russia	..	0.4
Slovakia	2.7	1.0
Slovenia	1.4	1.6
Japan	1.2	1.1
USA	4.7	5.2

Sources: Screen Digest, 9/1995, 9/1998.
European Cinema Yearbook 1998

12.14 Phonogram sales 1997

Country	Singles	LPs	MCs	CDs	Total	Copies/person
	Million copies					
EU						
Austria	3.2	0.0	1.3	19.9	24.4	3.0
Belgium	6.2	–	0.4	20.4	27.0	2.7
Denmark	1.1	–	0.5	17.6	19.2	3.7
Finland	**0.4**	**0.1**	**3.1**	**8.4**	**12.0**	**2.3**
France	44.3	0.2	16.2	106.7	167.4	2.9
Germany*	49.3	0.5	27.2	191.0	268.0	3.3
Greece	–	0.1	0.5	7.7	8.3	0.8
Ireland	1.8	0.0	1.7	4.6	8.1	2.3
Italy*	2.2	0.1	16.3	41.8	60.4	1.1
Netherlands	8.9	0.1	0.7	46.5	56.2	3.6
Portugal	0.3	–	3.4	10.8	14.5	1.5
Spain	1.9	0.2	14.1	42.8	59.0	1.5
Sweden	3.5	0.0	1.2	21.1	25.8	2.9
United Kingdom	87.0	2.5	36.6	158.8	284.9	4.9
Iceland	–	–	0.0	0.7	0.7	2.6
Norway	2.0	–	0.5	12.9	15.4	3.5
Switzerland	4.8	0.1	1.5	20.5	26.9	3.8
Bulgaria	–	–	0.8	0.1	0.9	0.1
Croatia	–	–	0.7	0.6	1.3	0.3
Cyprus	–	–	0.3	0.7	1.0	1.3
Czech Republic	0.1	–	5.7	5.2	11.0	1.1
Hungary	0.2	0.0	5.3	3.6	9.1	0.9
Latvia	–	–	2.1	0.2	2.3	0.9
Poland	0.4	–	22.0	7.8	30.2	0.8
Romania	–	–	5.3	0.3	5.6	0.2
Russia	–	0.1	100.0	8.0	108.1	0.7
Slovakia	0.0	–	1.7	1.2	2.9	0.5
Slovenia	–	–	0.6	0.5	1.1	0.6
Japan	147.2	8.3	7.3	272.3	435.1	3.5
USA	117.0	2.7	171.9	752.9	1 044.5	4.0

* *Sales by IFPI members. (Of total market value approx. 90% in Italy, 91% in Germany.)*

Source: IFPI World Sales 1997

12.15 Access to information technology (Spring 1998)

Do you have access to, or do you use...

	Austria	Belgium	Denmark	**Finland**	France	Germany	Greece	Ireland
	%							
A video recorder	70	76	80	**70**	77	67	40	85
A fax	17	20	36	**22**	19	22	6	13
A satellite dish	47	3	38	**21**	12	35	2	16
A pay-TV decoder	5	9	12	**9**	19	6	10	13
A TV fitted with teletext	61	63	85	**61**	13	66	6	50
A computer	28	35	61	**44**	27	32	12	21
A CD-ROM - reader	19	21	45	**25**	17	21	7	10
A modem	8	12	34	**23**	8	10	3	7
The Internet or the WWW	7	9	35	**31**	7	8	3	8
None of these	11	10	2	**14**	15	12	52	11

12.15 Continued

Do you have access to, or do you use...

	Italy	Luxembourg	Netherlands	Portugal	Spain	Sweden	United Kingdom	**EU15**
	%							
A video recorder	70	73	77	59	76	77	89	**74**
A fax	21	24	26	11	12	38	27	**21**
A satellite dish	5	12	5	11	11	31	28	**19**
A pay-TV decoder	9	5	4	4	11	20	21	**12**
A TV fitted with teletext	73	55	85	19	53	83	72	**57**
A computer	35	35	58	22	32	57	43	**35**
A CD-ROM - reader	20	22	36	13	14	42	25	**21**
A modem	10	12	27	6	8	36	19	**12**
The Internet or the WWW	9	11	23	6	8	39	20	**12**
None of these	11	16	4	34	11	4	5	**12**

Source: Eurobarometer, Report N.o.49 (1998)

Appendix 1.

Rates of exchange, yearly averages (1 ECU in FIM and 1 ECU in US $)

Year	ECU/FIM	US$/FIM
1980	5.19	3.73
1981	4.81	4.32
1982	4.72	4.82
1983	4.96	5.57
1984	4.74	6.01
1985	4.71	6.21
1986	4.99	5.08
1987	5.08	4.40
1988	4.95	4.19
1989	4.73	4.30
1990	4.87	3.83
1991	5.02	4.05
1992	5.80	4.49
1993	6.68	5.71
1994	6.17	5.22
1995	5.64	4.37
1996	5.75	4.59
1997	5.86	5.19
1998	5.99	5.34

Source: Bank of Finland

Appendix 2.

Transformation coefficients into 1995 – 1998 money, FIM

Year	Into 1995 money Coefficient	Into 1996 money Coefficient	Into 1997 money Coefficient	Into 1998 money Coefficient
1980	2.135	2.148	2.174	2.204
1981	1.907	1.917	1.941	1.968
1982	1.744	1.754	1.776	1.801
1983	1.607	1.616	1.636	1.659
1984	1.503	1.511	1.529	1.551
1985	1.418	1.427	1.444	1.464
1986	1.369	1.377	1.394	1.414
1987	1.321	1.329	1.345	1.364
1988	1.259	1.266	1.282	1.300
1989	1.181	1.188	1.203	1.219
1990	1.114	1.120	1.134	1.150
1991	1.069	1.076	1.089	1.104
1992	1.043	1.048	1.061	1.077
1993	1.021	1.027	1.039	1.054
1994	1.010	1.016	1.028	1.043
1995	1.000	1.006	1.018	1.032
1996		1.000	1.012	1.026
1997			1.000	1.014
1998				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 – 1998

Year	At current prices, FIM million
1980	191 376
1981	216 660
1982	243 585
1983	271 607
1984	304 597
1985	331 628
1986	354 994
1987	386 855
1988	434 341
1989	486 998
1990	521 349
1991	497 640
1992	486 762
1993	492 694
1994	521 139
1995	561 175
1996	587 437
1997	630 245
1998	675 686

The figures are based on SNA 68 until 1989,
from 1990 onwards on ESA 95.

Source: Statistics Finland - Economic Statistics: national accounts

Appendix 4.

Mean population 1980 – 1998

Year	Population
1980	4 779 500
1981	4 800 000
1982	4 826 900
1983	4 855 800
1984	4 881 800
1985	4 902 200
1986	4 918 200
1987	4 932 100
1988	4 946 500
1989	4 964 400
1990	4 986 400
1991	5 013 700
1992	5 042 000
1993	5 066 500
1994	5 088 300
1995	5 107 800
1996	5 124 600
1997	5 139 800
1998	5 153 500

Source: Statistics Finland - Population Statistics

Appendix 5.

Number of households 1980 – 1997

Year	000 households
1980	1 868.5
1985	2 018.7
1986	2 035.6
1987	2 082.3
1988	2 102.3
1989	2 149.2
1990	2 174.7
1991	2 200.2
1992	2 218.0
1993	2 243.1
1994	2 261.7
1995	2 291.3
1996	2 310.0
1997	2 326.0

Source: Statistics Finland - Household surveys

Adresses

Antipiracy Center in Finland
P. Roobertinkatu 16
FIN-00120 Helsinki
Tel. +358-9-6803 4049
Fax +358-9-6803 4010

Arts Council of Finland
Maneesikatu 7
FIN- 00171 Helsinki
Tel. +358-9-1341 71
Fax +358-9-1341 7069
website http://www.minedu.fi/tkt/english/

Association of Finnish Broadcasters
Lönnrotinkatu 11 A
P.O.Box 312
FIN-00121 Helsinki
Tel. +358-9-2287 7340
Fax +358-9-6482 21
e-mail pirjo.tykka@radioliitto.fi
website http://www.radioliitto.fi/

Association of Finnish Periodicals
P.O.Box 267
FIN-00121 Helsinki
Tel. +358- 9- 22 87 72 80
Fax +358-9- 60 34 78
e-mail toimisto@aikakaus.fi
website http://www.aikakaus.fi/

AVEK/ The Promotion Centre for Audiovisual Culture
Hietaniemenkatu 2
FIN-00100 Helsinki
Tel. +358-9-4315 2350
Fax +358-9-4315 2388
e-mail avek@avek.kopiosto.fi
website http://www.kopiosto.fi/avek/

Copyright Office Kopiosto
Hietaniemenkatu 2
FIN-00100 Helsinki
Tel. +358-9-4315 21
Fax +358-9-4315 2388
e-mail kopiosto@kopiosto.fi
website http://www.kopiosto.fi/english/

Federation of the Printing Industry in Finland
Lönnrotinkatu 11 A
FIN-00121 Helsinki
Tel. +358-9-2287 7200
Fax +358-9-6035 27
e-mail Pertti.Lindroos@gtl.ttliitot.fi

Finland Posts Ltd/Corporate communications
P.O.Box 1
FIN- 00011 POSTI
Tel. +358-9-0204 5154 15
Fax +358-9-0204 5156 45
e-mail finland.post@posti.fi
website http://www.posti.fi/english/

Finnish Audit Bureau of Circulations
Lönnrotinkatu 11 A
FIN-00120 Helsinki
Tel. +358-9-2287 7330
Fax +358-9-645 040
website http://www.mediatarkastus.fi/

Finnish Board of Film Classification
Jaakonkatu 5 B
FIN-00100 Helsinki
Tel. +358-9-2285 41
Fax +358-9-2285 4470
e-mail Tuula.Roos@vet.fi
website http://www.vet.fi/english/board.html

The Finnish Book Publishers' Association
Lönnrotinkatu 11 A
FIN-00120 Helsinki
Tel. +358-9-2287 7250
Fax +358-9-6121 226
e-mail finnpubl@skyry.pp.fi
website http://www.sky.cultnet.fi/

Finnish Broadcasting Company YLE
Radiokatu 5
FIN-00024 Yleisradio
Tel. +358-9-14 801
Fax +358- 9-1480 3215
e-mail fbc@yle.fi
website http://www.yle.fi/

Finnish Cable TV Association
Lönnrotinkatu 11 A
FIN-00120 Helsinki
Tel. +358-9-2287 7450
Fax +358-9-6121 910

Finnish Composers' Copyright Society TEOSTO
Lauttasaarentie 1
FIN-00200 Helsinki
Tel. +358-9-6810 11
Fax +358-9-6771 34
website http://www.teosto.fi/

Finnish Federation of Producers of Phonograms and Videograms ÄKT
Yrjönkatu 3
FIN-00120 Helsinki
Tel. +358-9-6803 4050
Fax +358-9-6803 4056
e-mail ifpi@ifpi-fi.fi

The Finnish Film Archives
Pursimiehenkatu 29-31 A
FIN-00151 Helsinki
Tel. +358-9-6154 00
Fax +358-9-6154 0242
e-mail sea@sea.fi
website http://www.sea.fi/eng/

Finnish Film Distributors' Association
Kaisaniemenkatu 3 B
FIN-00100 Helsinki
Tel. +358- 9- 635 898
Fax +358-9-176 689

Finnish Film Foundation
Kanavakatu 12
FIN-00160 Helsinki
Tel. +358-9-6220 300
Fax +358-9-6220 3050
e-mail keskus@ses.fi
website http://www.ses.fi/SES/

Finnish Library Association
Vuorikatu 22 A
FIN-00100 Helsinki
Tel. +358-9-6221 340
Fax +358-9-6221 466
e-mail fla@kaapeli.fi
website http://www.fla.fi/

Finnish Newspapers Association
P.O.Box 415
FIN-00121 Helsinki
Tel. +358-9-2287 7300
Fax +358-9-6079 89
e-mail info@sanomalehdet.fi
website http://www.sanomalehdet.fi/

Gramex
Pieni Roobertinkatu 16
FIN-00120 Helsinki
Tel. +358-9-6803 400
Fax +358-9-6803 4010
website http://www.gramex.fi/

Helsinki University Library
Bibliographical Department
P.O.Box 26
FIN-00014 Helsingin yliopisto
Tel. +358-9- 70851
Fax +358-9-7084 4341
e-mail HYK-tietopalvelu@helsinki.fi
website http://hul.helsinki.fi/hyk/hul/indexe.html

MDC Helsinki Group-Media Research Ltd.
Itätuulenkuja 10
FIN-02100 Espoo
Tel. +358-9-6135 00
Fax +358-9-6135 0610
e-mail gallup.media@mdc.fi
website http://www.mdc.fi/

Ministry of Education
Department of Culture
P.O.Box 293
FIN-00171 Helsinki
Tel. +358-9-13 41 71
Fax +358-9-135 93 35
website http://www.minedu.fi/minedu.html

Ministry of Traffic and Communications
P.O.Box 235
FIN-00131 Helsinki
Tel. +358-9-1601
Fax +358-9-160 2590
e-mail info@mintc.fi
website http://www.mintc.fi/www/sivut/english/default.html

National Board of Customs
Uudenmaankatu 1-5 C
FIN-00120 Helsinki
Tel. +358-9-6141
Fax +358-9-6142 852
website http://www.tulli.fi/

Nordicom Finland
University of Tampere
Department of Journalism and Mass Communications
Kalevantie 4
FIN-33101 Tampere
Tel. +358-3-2156
Fax +358-3-2156
e-mail kipalu@uta.fi
website http://lieko.uta.fi/laitokset/tiedotus/nordicom/

Statistics Finland
Media and Culture Statistics
Työpajankatu 13
FIN-00022 Statistics Finland
Tel. +358-9-17 341
Fax +358-9-17 34 32 64
e-mail kirjasto.tilastokeskus@stat.fi
website http://www.stat.fi/

Telecommunications Administration Centre
Itämerenkatu 3
FIN-00181 Helsinki
Tel. +358-9-69661
Fax +358-9-6966 410
website http://www.thk.fi/englanti/

Turku School of Economics
Business Research an Development Centre
Media Group
Rehtorinpellonkatu 3
FIN-20500 Turku
Tel. +358-2-3383 11
Fax +358-2-3383 299
e-mail international@tukkk.fi
website http://www.tukkk.fi/info/english/

Union of Journalists in Finland
Hietalahdenkatu 2 B
FIN-00180 Helsinki
Tel +358-9-6122 330
Fax +358-9-6053 96
website http://www.journalistiliitto.fi/english/

University of Helsinki
Department of Communication
Unioninkatu 37
FIN-00014 University of Helsinki
Tel. +358-9-1911
Fax +358-9-1918 849
e-mail comm-info@helsinki.fi
website http://www.valt.helsinki.fi/kv/

University of Jyväskylä
Department of Communication
P.O.Box 35
FIN-40351 Jyväskylä
Tel. +358-14-2601 211
Fax +358-14-2601 511
e-mail tiedotus@jyu.fi
website http://www.jyu.fi/jyucomm/laitos/comm.html

University of Jyväskylä Library
P.O.Box 35
FIN- 40351 Jyväskylä
Tel. +358-14-601 211
Fax +358-14-603 371
e-mail tiedotus@jyu.fi
website http://www.jyu.fi/library/

University of Jyväskylä
Research Unit for Contemporary Culture
P.O.Box 35
FIN-40351 Jyväskylä
Tel. +358-14-6012 11
Fax +358-14-6010 21
e-mail tiedotus@jyu.fi

University of Tampere
Department of Journalism & Mass Communication
Kalevantie 4
FIN-33101 Tampere
Tel. +358-3-2156 243
Fax +358-3-2156 248
e-mail jour@uta.fi
website http://www.uta.fi/jour/index1.html

VTT Information Technology/
Printed communications
P.O.Box 1000
FIN-02044 VTT
Tel. +358-9-4561
Fax +358-9-4567 000
website http://www.vtt.fi/tte/pub/

Finnish Mass Media 1999 provides a comprehensive statistical overview of the media scene in Finland. The report is organised into chapters on mass media economy and consumption; television; radio; phonograms; video; films; books and libraries; newspapers and magazines; and government subsidies for the mass media. There is also a separate chapter with international comparative data. Summary articles on each mass media sector complement the statistical overviews.

Tilastokeskus, myyntipalvelu
PL 3B
00022 TILASTOKESKUS
puh. (09) 1734 2011
faksi (09) 1734 2474
tilastomyynti@tilastokeskus.fi
www.tilastokeskus.fi

Statistikcentralen, försäljningstjänten
PB 3B
00022 STATISTIKCENTRALEN
tfn (09) 1734 2011
fax (09) 1734 2474
tilastomyynti@stat.fi
www.stat.fi

Statistic Finland, Sales Services
P.O.Box 3B
FIN-00022 STATISTICS FINLAND
Tel. +358 9 1734 2011
Fax +358 9 1734 2474
tilastomyynti@stat.fi
www.stat.fi

ISSN 0784-8765
= Culture and the media
ISSN 1455-9447
ISBN 951-727-608-7
Product number 9593
BBO

9 789517 276085