From Channel Competition to Cluster Competition: Finnish and American Radio Formatting 1985 - 2000.

Marko Ala-Fossi

L.Soc.Sc, Doctoral Student
Department of Journalism and Mass Communication
University of Tampere, Finland

&

Trainer, Radio Workshop
Radio and Television Institute
Finnish Broadcasting Company [Yleisradio Oy]
marko.ala-fossi@yle.fi

For the panel
Technology, Formatting and Competence:
Trends and Dynamics in Scandinavian Radio Broadcasting

Moderator : Gregory Ferrell Lowe, Adjunct Professor, Ph.D.

Presented at the 46th Convention of the Broadcast Education Association (BEA),
Las Vegas , Nevada, April 20-23, 2001

In the U.S. commercial radio enjoys a long heritage, a large market and significant growth in recent years. In Finland the market is small and the commercial radio industry has not realized anticipated market growth in the first 15 years of business. Despite contrasts, characteristic trends indicate remarkable similarities in competitive strategies, influenced by radio practice in the United States. Finnish commercial radio companies have adopted methods that have been successful in the U.S. markets. American influence has also gained strength from the expanding multinational companies operating in Finland. These companies are replicating their succesess in a new cultural environment by adapting the reliable pattern developed elsewhere. Moreover, the trends in Finland and in the U.S. are similarly keyed to deregulation, which has produced ownership concentration and consolidation. Although the national contexts are quite different, the market logic is the same. This is the reason for similar strategies for cluster competition in both markets. This paper offers a comparison of Finland and the U.S. with a focus on theoretical discussion about effects of deregulation on the radio industry.

Introduction : Three Thematic Threads

The author analyzes and compares the development of programming and formatting strategies in Finnish commercial radio since its introduction in 1985 with simultaneous developments in American radio. The analysis is governed by three thematic threads or long-term processes that characterize the development of Finnish commercial radio.

The first and most fundamental thread is a correlated experience in which Finnish local radio policy has clearly been driven by the intrests of commercial radio companies (McChesney 1993, 228-248; Brown 2000, 22-23). Moreover, as has been the case in recent years in the U.S., every significant change in the regulatory policy for Finnish radio has happened after a period of urgent financial crisis in commercial industry such that changes are keyed to economic media policy.
Second, the development of programming strategies is intertwined with deregulatory decisions. Because the market logic framing the competitive environment after deregulation is arguably the same, certain industrial dynamics have produced strong similarities in the Finnish and in the U.S. commercial radio despite their sharp contextual contrasts. Current trends indicate that consolidated radio companies are competing with each other using new cluster programming strategies in both markets, and have similarly produced a deepening crisis of independent local radio in both countries.

The third thread is a gradual McDonaldization[1] of Finnish radio culture and globalisation of the market. Small and locally owned stations with home-made programming ideas and production models based on earlier public service legacies have disappeared and been replaced mostly by streamlined network stations. Most of them have been bought up or driven out by international media companies using the methods characteristic in the U.S. and other larger markets. The author will trace these threads via a chronological treatment. We begin with the early period of localism as an ideal and traditional value in the Finnish radio experience, following with investigation of recent trends that also indicate strong parallels with the American practice since the mid-1990s.

Local radio ideals and traditional localism : 1985 - 1993

Unlike other Scandinavian countries, most local radios in Finland have been private commercial enterprises financed by advertising sales since their introduction in 1985. Those few choosing not to finance their operations by advertising revenues did so because of ideological preferences. Finnish licencing policy in the late-1980s was keyed to assuring the new industry with economic

[1] According to George Ritzer McDonaldization is the process by which the priciples of the fast-food restaurant are coming to dominate more and more sectors of the American society as well as of the rest of the world. (Ritzer 2000,1)

profitability by setting large licensing areas. It was thought that the profit of radio advertising sales would thereby be sufficient to ensure the viability of commercial local radio (Jauert 1994,166; Jyrkiäinen & Sauri 1997, 47; Skogerbø 1996, 253; Hujanen & Jauert 1998, 110). As late as the early 90s it was believed that creating radio for a segmented audience in Finland would not be realistic because of the scanty population basis (Gronow 1992, 197).

In the early years many Finnish local radio pioneers really believed that this new media would also better serve their local communities and increase freedom of speech (compare, for example Wallis 1992 and Gronow 1987)[2]. This ideal did not live for very long (Hujanen 1993, 189-203; Hujanen 1996,181-195). Focusing on the promotion of local culture and renting broadcasting time to different local organizations was idealistically attractive, but it was not a good business for a commercially financed radio. Even those companies that were not profit-seeking could not continue a policy that resulted in permanent losses (Wedell & Crookes 1991, 47-49). Similar kind of development also characterized early radio in the U.S. (McChesney 1993, 228).

In the early period, local radios in Finland were so dispersed, that they had no real commercial competition. In this way the breakers of the former YLE monopoly enjoyed a remarkably monopolistic position in the local markets. This condition made it comparatively easy for local radio operators to construe their audiences as a local mass: the most important aspect was keyed to the collective size of the audience. Regulators supported this perspective by defining their functions, in licence conditions, in terms of program origin rather than program content – i.e. by their locality (Rothenbuhler 1996,133; Skogerbø 1996, 253; McQuail 1992, 90).

Thus, in the first years Finnish local commercial radio offered something for everyone (Tuominen 1993, 158-160; Kyhäräinen 1992, 83-84, 33 and 35), trying to please all kinds of local people and competing with national public service channels by offering a local alternative. The YLE heritage in Finnish radio culture was so strong that commercial programming sometimes resembled public service radio (Ala-Fossi 1995,111-113). In the beginning, Finnish local radio defined their audiences and established their operational practice on the basis of location. Actually they had no other useful methods to identify their potential audience. This early conception of localism was similar to the traditional conception of localism in the U.S. radio: it was purely spatial localism (Rothenbuhler 1996, 133-134; McQuail 1997, 2, 27; Stavitsky 1994, 20-25).

Moreover, as was the case in YLE radio, the early local radios did not have any regognizable formats. The selection of music was not based on selected playlists or profiles, but rather on listener requests and DJ preferences (Kujala, Lahti & Tamminen 1998, 13-14). The emergence of competing local radio stations targetting the same audience created clearer program profiles. It was naively thought that the operational situation was unlikely to change, because only the capital city (Helsinki) offered a population considered big enough for several local radio stations. (Kyhäräinen 1992, 83-84, 33, 35)

National public service radio, Yleisradio [YLE], was nonetheless losing ground in competition with local radio from 1985 through 1989. Young Finns were especially enthusiastic about the local independents, and abandoned YLE's radio channels in droves. This changed after June 1990 when YLE launched a ”radio reform” that resulted in profiling its three national channels to target different audience groups. Thus, as odd as it might sound, the old public service company actually began the profiling and targeting schema that would become characteristic throughout Finland by the mid-1990s.

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[2] The activists for new low –power FM radio (LPFM) in the U.S. have actually very similar kind of ideal (see Stavitsky, Avery & Vanhala 2000).

Traditional public service programming and classical music remained the specialty of Ylen Ykkönen (the former YLE 1), while regional programs, news and current affairs programming, as well as sports, were crammed together in Radio Suomi (YLE 3). In many ways this was a channel created from ”leftovers.” This channel also aired a genre of Finnish light music called *iskelmä*[3]. A new youth and pop culture channel was the brightest star in the new public radio firmament, titled with the self-ironical name – Radiomafia (the former YLE 2). Although Radiomafia enjoyed remarkable early success through 1995, it has suffered steep declines in popularity and competitive success in recent years. Surprisingly, perhaps, the most consistently successful radio channel in Finland has been Radio Suomi. Even today it enjoys a 38 percent daily reach for all Finns over 9 years old, and a 44 percent share of all radio listening (KRT 20/2000).

In 1990 YLE was the only multichannel radio company in Finland. By profiling its three national channels it actually created the first competive channel cluster in the Finnish radio market, while the local commercial stations tried to do everything on a single channel. In an odd twist, then, the local radios maintained the old public broadcasting approach while the public broadcasting company launched a characteristically commerical approach in radio channel development. So in this light, the whole YLE radio reform – not only the new channels – can be seen as a new competitive approach to the market (Lowe 1992, 194-197).

Alan Stavitsky argues that the change of conceptions about localism in American public radio and the rise of the audience research were linked (Stavitsky 1994 ; Stavitsky 1995; Avery & Stavitsky 2000).The same development pattern characterized what happened in Finnish local radio during the early 1990´s. Although some local radios conducted small audience research for marketing purposes in the late 1980´s, it was not until 1991 that the Association of Finnish Local Radios and YLE concluded an agreement resulting in the first syndicated, combined national and regional audience research (Ruohomaa 1993, 57-58; Ala-Fossi 1995, 39). This marked a crucial turning point because with the increase of information about audience the conception of a local audience as a mass began to fade. In short, the conception of localism began to shift from spatial to social emphasis.

Channel competition and formatting in terms of social locality : 1993- 1997

Finnish local radio lost a considerable share of their respective audience to the reformed YLE channels after 1990. Also commercial competition gradually increased as a result of new commercial licences. During 1991-1992 , 28 local stations in Finland had overlapping coverage- and marketing areas (Säkkinen 1995, 68). Simultaneous economic depression in Finland and financial crisis intensified the effects of competition. After one year of the YLE radio reform there were early signs of new ways to do business: a few competing local stations in the biggest cities profiled their music and adopted playlists (Tuominen 1993, 158-160). In autumn 1993 the wind of change blew strong in the countryside, as well. The competitive situation between three radio stations in the district of Seinäjoki[4] in Ostrobothnia, Western Finland is a good example as it led to a kind of "division of labor" between the stations through formatting and counterformatting. (Ala-Fossi 1995, 108-111; Ala-Fossi 1997, 18)

By 1994, the national economic crisis was the defining rationale[5] for a liberalisation of licensing policy and loosening the previously tight conditions that demanded locality in programming. International media companies also entered the Finnish radio market in the form of a new type of ”special radios”. ClassicFM was granted a licence despite its foreign ownership by GWR (UK),

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[3] This genre of Finnish music will be described more in detail on pages 8 and 9 of this paper.
[4] The author has worked as a YLE regional radio news journalist and producer in Seinäjoki during years 1989-1999.
[5] Just like the Great Depression was the rationale for the policy in the U.S. during the 1930´s. (McChesney 1993, 240)

while SBS (Luxemburg/USA) had to bring KissFM to the Finnish market through company acquisitions.(Ala-Fossi 1995, 7-8; Ala-Fossi 1997, 6-7; Kohvakka & Sauri 1998, 157; Sauri 1998, 147). This was the second wave of local radio deregulation in Finland. After 1994 as more stations in Finland adopted the operational model[6] of American format radio the McDonaldization of Finnish local radio began. Radio was more and more just another business with no special values (Brown 2000, 24).

In the mid 1990´s several Finnish local radios adopted a new conception of the audience and localism. It is unclear whether the change was conscious or unconscious. The idea of audience was still loosely defined by the spatial parameters, but the social conception of a ”community” became more important. The most important factor defining social community identity was thought to be musical taste, perhaps not surprising because most of the programming was music-based. The audience was now defined by place and content, while the content was increasingly keyed to musical genre and defined as taste culture and lifestyle. A similar change happened also in the U.S. public radio in the 1990's. (McQuail 1997, 31; Stavitsky 1994, 20)

The new definitions of target audiences evident in Finnish commercial local radio resulted in format approaches that were remarkably homogenous. Most stations tried to reach targeted audiences with a so called *FinnAC* – format (Säkkinen 1995,129 ; Kujala, Lahti & Tamminen 1998, 10, 26). Finnish commercial radio companies explained this concentration of music formats by arguing that Adult Contemporary offered the strongest guarantee of reaching the biggest demographic group (age 25 to 54) sharing the same music preference. Another and far more important reason is the fact that this group is composed of wage-earning and active consumers in the high consumption period of their lifecycle (Lahtinen, Isoviita & Hytönen 1991,80). Because most advertisers want to reach that group, it is the most profitable target group for commercial radio.The same pattern characterised formatting practice in the American radio industry. AC with its variations on a theme, was the most popular radio format in the U.S. after Country. It succeeds in all markets because it attracts a high percentage of listeners between 25 and 54. The highest consumer group receives the most commercial radio services, in Finland as in the U.S. (Säkkinen 1995, 129; Carroll & Davis 1993, 8-9, 218-219; McQuail 1992, 153-154,162,177; MacFarland 1997, 77)

The mid-1990´s was a period when the three main development processes in Finnish commercial radio became visible for the first time. The deregulatory decisions during, and especially after, the deep recession created commercial competition and, together with the development of the audience research and the change of audience conceptions, this resulted in significant change of programming strategies. This way deregulation gave a start for adopting American practices in Finnish radio culture : new methods were needed in new competitive situation. Also the globalization of the Finnish radio market began as a consequence of deregulatory decisions.

Network radios and cluster competition : 1997 -

In September 1996, the Finnish government granted the first and only national commercial licence to Oy Suomen Uutisradio Ab [Finnish Newsradio Ltd]. That was the decisive turning point in licencing policy. The new national channel destroyed the last local commercial monopolies and duopolies in Finnish radio broadcasting even as it received a monopoly position as the sole nationwide commercial radio channel. Unlike the only national commercial radio in Norway, P4, the new channel had no clear and definite public service requirements. However, the new channel was expected to be a tough competitor for YLE Radio Suomi on the basis of applicant promises by

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[6] Which reprensents the basic dimensions of McDonaldization: efficiency, calculability, predictability and control . (Ritzer 2000, 11-15) See also MacFarland 1997, 13.

offering lots of news and current affairs programming along with Finnish music. (Ala-Fossi 1999, 24-46)

The main reason for the special treatment of Suomen Uutisradio was, again, economic. In licencing the new national radio channel, the Finnish government pursued raising more money for the digitalisation of terrestrial broadcasting so this initiative could be completed without investing public monies. This is quite clear in reading the licence stipulations because the new channel is required to launch digital services. Despite this, the only national licence was not awarded to the highest bidder as in the UK , but rather using the "beauty parade" system (Wall 2000, 188). Suomen Uutisradio was also licenced as a completely Finnish commerical company in an effort to create a domestic counterweight to international commercial radio networks. Political decision-makers were also taking care of their own economical interests, because the owners of new monopolistic channel had connections to the three biggest political parties.The biggest shareholders were AlmaMedia (48%) and Suomen Viestintärahoitus, which owned shares directly and via another company (totalling 26 %). These two companies also owned and controlled about ten local radio stations around the country. (Ala-Fossi 1999, 24-44)

The Finnish radio regulation has from the beginning been more about ownership regulation than content regulation: still there is no set limitations for how many stations you are allowed to control. There is also no such system, as in UK, called Promises of Performance, where a station offering services that differ from those outlined in the original promise are fined (Wall 2000, 188-189). In Finland the licenses are awarded partly on the basis of the original promise, but in practice - as you later find out - one doesn´t have to worry much about that promise after getting the license. Actually the Ministry of Traffic and Communications has no other way to punish you than withdraw the licence : and this has never happened during licensed term (Ala-Fossi 1999, 43, 183-185).

So it is no wonder that even if the Finnish Newsradio Ltd may have given a totally different promise, the new channel called Radio Nova was formatted as a Soft AC. After all, for evident economic reasons described before, it targetted the 25 to 45 demographics like most local stations in Finland. In a survey of program directors in all commercial radio stations in Finland conducted in June 1998, 72 percent described their stations music profiles or formats so, that they could be defined to be a Finnish version of Adult Contemporary[7] (FinnAC). Only three of 32 respondents were able to define their music profile with one single genre of music. So by 1998, almost every commercial radio was competing for the same audience segment. (Ala-Fossi 1999, 121-122)

Radio Nova was launched in May 1997, and it was an immediate success with Finnish young and young adult audiences. After the first year it reached daily about 20 percent of all radio listeners in Finland. Quite soon the success of Radio Nova affected the local radio advertising markets.Two local radios operating in Lahti announced in December 1997 that they had signed the first local marketing agreement (LMA) in Finland. Rytmiradio and Radio 99 were trying to share the local radio advertising market in peace to co-operate so that both companies could survive. (Ala-Fossi 1999, 39-40, 72)

Radio Nova created the first national standard for commercial radio programming in Finland. It has consistently offered listeners a well produced, entertaining program made by talented professionals trained in local radios, and also in YLE. " Sound is a part of our substance" , said Radio Nova's program director, and hired the first full-time radio sound designer in Finland (Ala-Fossi 1999, 34-35). Radio Novas programming has a recognizable sound (Puro 1999, 182-184), charateristic consistency and uniform quality – i.e. all the ingredients previously missing from locally produced

[7] AC stations in the U.S. also have had difficulties to find unique ways to describe their sound and this way differ from their competitors. (MacFarland 1997, 77-78)

commercial programming in the typical case. In this way the quality of Radio Nova's national programming made local productions seem less impressive by comparison[8], even though the music format and the playlists were nearly identical. Even the program directors of competing local stations had to admit that Radio Nova had a "really professional sound" (Ala-Fossi 1999, 28-173).

In light of Radio Nova's success, it is no wonder that the daily reach of most local commercial stations were in steep decline in all regional markets. The biggest losers were situated around Finland in regional cities that had formerly been almost or totally free of commercial competition such as Radio Janne, Rytmiradio, Radio Jyväskylä and Oikea Asema.These channels had formatted their programming to primarily target the youngest segment of commercially viable audiences. Despite the luxury of not being susceptible to local commercial competition in radio, none of these channels featured much local emphasis. (Ala-Fossi 1999, 168-169) As you later find out, this strategy was a fatal error.

In 1998 Radio Nova's turnover already reached 53 million FIM (about $10 million USD at that time) and its share of all radio advertising was about 25 percent. Mainly because of Radio Nova's success, the total turnover for all competing local commercial radios declined about 10 percent to 20 million FIM (Tilastokeskus 18.12. 2000). This financial situation had the biggest impact accounting for a third wave of deregulatory decisions in spring 1999. The Ministry of Transport and Communications changed its previously hardline attitude opposing semi-national networks and suddenly embraced also the networking of local stations and licencing parallel frequencies for local radio companies. This remarkable change in Finnish regulatory policy strongly parallels the Telecommunications Act of 1996 in the U.S., and it is possible that it was also influenced by that.

The Finnish government renewed the licences of practically all functioning local radio stations, and at same time expanded some of their licences.[9] Eight different local operators also received parallel frequencies for programming either to youth or elderly people. "Special analog radio licences" were also granted to seven semi-national format networks : four of them were totally new and also wanted to pursue new formats. Instead of same AC, one new network was bound to Russian-speaking programming and another to Christian programming, while the third was targetted for tourist service in Lapland. (Ala-Fossi 1999, 185-186)

This round of deregulatory practice also embraced significant increases in the presence and involvement of international media companies. Oy P4 Finland Ab, owned mainly by P4 (Norway) and MTG (Sweden), obtained licences for launching a jazz-music network (Groove FM) and a second network for Finnish music. Again the original promise of programming was broken : it is likely that the Norwegians and Swedes did not want to format with a music genre totally unknown to them, and in the end the second network (StarFM) offered a HotAC format (Markkinointi & Mainonta 41/1999) just like MTG's Rix -network in Sweden. Also Energy (NRJ, France), KissFM (Luxemburg /USA) and Classic FM (UK) were given licenses for additional cities, and this in way also expanded their networks. (Ala-Fossi 1999, 185-186; Liikenneministeriö 11.3. 1999a)

The government also deleted licence conditions that had prevented local stations from networking. The biggest owners of Radio Nova , AlmaMedia and Suomen Viestintärahoitus were now able to link their 10 local stations to launch a new semi-national network. They were also able to persuade some independent local stations to the joint enterprise via the new Plus- network during 1999. At its height, the joint operation consisted of 18 different local stations around the country. (Ala-Fossi 1999, 185-186; Radio Plus 3.11.2000; Iltalehti 20.12.1999. Liikenneministeriö 11.3. 1999b)

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[8] Just like the case with network programming versus local programming in the U.S public radio. (Stavitsky 1994, 23)

[9] Despite of the LMA- argreement , Rytmiradio from Lahti was not able to renew its licence anymore: according to the Ministry of Transport and Communications its application was insufficient. (Liikenneministeriö 11.3. 1999a)

Insufficient understanding of multichannel competition was probably the reason why AlmaMedia and Suomen Viestintärahoitus did not carry out any kind of cluster strategy with the Radio Plus – network and Radio Nova. Finally, their local stations lost their locality in this AC-formatted and semi-national network - and at the same time they had to compete for national advertising with their other channel, Radio Nova. Local stations complained, but without effect. The result was financially disastrous : despite lower costs, the "Minus-network" was unprofitable. (Markkinointi & Mainonta 37/2000a; Markkinointi & Mainonta 3.11.2000) Because of the heavy losses, Suomen Viestintärahoitus decided to withdraw from Finnish commercial radio. In May 2000 they sold their shares (26%) in Radio Nova to P4 International, and in December they shut down four local stations[10] in the Plus-network after failing to sell the stations or their share of the whole network to American[11] and Finnish companies. (Journalisti 10.11.2000; Markkinointi& Mainonta 37/2000)

After buying shares in Radio Nova, P4 was no longer interested in developing StarFM and GrooveFM. In November 2000 it sold all the shares in those networks to an American company called MetroMedia International Inc. (Markkinointi & Mainonta 41/2000). AlmaMedia did not like the new situation and fortified their positions by buying more shares in Radio Nova. Because of these major changes in the ownership of Finnish commercial radio, The Ministry of Transport and Communications demanded that the all new owners apply for licence renewal in December 2000. Also several new companies made applications for analog licences. There were almost seventy applicants in total. (Liikenneministeriö 18.12.2000; Aamulehti 5.1.2001, STT 227 4.1.2001; Liikenneministeriö 4.1.2001)

The Finnish Government continued its reformation policy in granting 29 new licences in February 2001. Sports magnate Harry Harkimo and Sanoma WSOY, the biggest media company in Finland, received a license for a new, semi-national sports network. The new network has 12 frequencies keyed to the towns where the most important Finnish soccer and ice hockey teams are located. The other channel of the Sanoma Group cluster, a regional network called Sävelradio, was also favoured with new frequencies that will create nearly national coverage. Radio Nova was allowed to continue as before, despite changes in its ownership, as were MetroMedia jazz and Finnish music[12] networks, which were awarded a few new frequencies. The KissFM network will expand its coverage to include smaller towns and some parts of the countryside, while SBS also got a new local license for Jyväskylä. (Liikenneministeriö 8.2.2001) The living space for Finnish independent local radio continues to dwindle, and the prognosis for local programming and service is bleak. One of the original pioneers of independent local radio in Finland, Saksa Brothers Company (SBC) drew their conclusions. Three weeks after this latest of round of licensing they sold 45 percent of their shares to French NRJ. Ironically, this business agreement was in the news on the day of Finnish Culture (Helsingin Sanomat 28.2.2001).

Common trends and three main reasons

Although commercial radio markets in the U.S. and Finland are quite different in many respects, remarkable similarities, common trends and analogies can be found. These are especially evident in

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[10] Radio Plus Janne, Radio Plus Vaasa and Radio Melody and Radio Plus Jyväskylä . The last of the biggest losers to Radio Nova, Oikea Asema from Kuopio was sold twice after autumn 1998.(Ala-Fossi 1999, 186; STT 118 30.11.1999)

[11] SFX Entertainment bought the leading Finnish concert promoter Welldone in August 2000. According to the CEO of Welldone Risto Juvonen, SFX and Clear Channel Communications had negotiated in October also about buying radiostations in Finland. (Rumba 20/2000)

[12] Former StarFM is this time really going to concentrate on Finnish music (Markkinointi & Mainonta 42/2000) under new name SuomiPOP. New York-based MetroMedia International Group is already running successful radio stations in Czech Republic, Estonia and Bulgaria with format based on local pop and rock (Radio World 1/2001).

recent competitive strategies, formatting solutions and in programming practices. There are at least three reasons explaining the similarities.

1) Most Finnish companies are trying to model, adopt or imitate methods, practices, strategies and concepts from the U.S. markets and American commercial radio companies. Those doing this most unskillfully are in the greatest danger of perishing.

2) American companies are operating in the Finnish market, using the same strategies and methods that are tried and proven in the U.S. markets. Non-American but other international media companies are also using those strategies and methods.

3) The most important common denominator is, however, deregulation. The market logic and the market mechanics forming the new competitive environment since deregulation are basically the same in the U.S. and Finland.

Preceding discussion has already given evidence of the first reason. For example, the design of Radio Nova was made according to the very same principles that are widely used by the U.S. radio industry. On the other hand, cases like Rytmiradio, Oikea Asema and the notorious Plus- network prove that if you want to play the game with the new rules, you must know them first. It is possible to imitate the form without really understanding the function, and it seems likely that too much of what is being currently modeled and adopted in Finnish commercial radio has been handled without much critical thought, and without a necessary thorough knowledge of the context in which it originates and the concepts on which it depends.

SBS Radios, a Finnish affiliate of an American media conglomerate, UnitedGlobalCom, is a perfect example of the second reason. It is making very successful business in Finland with a cluster network strategy of three profiled networks, using a variety of methods familiar from the U.S. markets. Its turnover last year was 80 million FIM (about 12,3 million USD), which is about one third of total radio advertising sales in Finland. (Mediauutiset 7/00; UGC 3.1.2001; Markkinointi & Mainonta 4/2001) The oldest SBS cluster network is the chain of local stations (Finn AC) in four of the biggest cities in Finland. These stations are among the most successful local radios in Finland : only Radio City in Helsinki has suffered losses during recent years (Markkinointi & Mainonta 4/2001). These SBS stations have clear formats and playlists, and they have also a strong local orientation (Pönni, Grönlund & Picard 2000, 387-388). Ironically, almost the only things not local in these stations are their ownership and production culture.

The second is a semi-national lifestyle radio network (CHR) for youth and young adults called KissFM operating in 12 cities. The morning show producer of this network, Henkka Hyppönen received international publicity with a very Howard Stern-like trick : he broadcast a live group sex act (Ilta-Sanomat 8.6.2000). The Association of Finnish Broadcasters awarded him the ”Radio Voice of the Year” on the same day, that KissFM gave an official explanation about the group sex broadcast to the authorities (STT 234 12.6.2000, STT 285 09.06.2000). These investigations did not result in any charges, but Hyppönen got his own tv-show later (YLE TV2 5.2.2001; Ilta-Sanomat 16.1.2001).

The third SBS network, Iskelmäradio is formatted with Finnish iskelmä-music for people over 30. The rise of this first Finnish genre of music format in commercial radio may have been the most evident trend in Finnish commercial radio programming during two past years. This kind of music has been the backbone of YLE Radio Suomi playlists since 1990, while the most commercial stations trusted more in international hits. The iskelmä – format owes a lot to the old YLE light music programming, but now the concept of single music program has been commercialized and expanded to a whole channel concept. This format can also be seen as a Finnish application of

Country, because the nearest cultural substitute for this genre of music in the U.S. is Country. This corresponding relationship is based mainly on their position in socio-cultural contextes and backgrounds (Salminen 1991,52; MacFarland 1997, 71-73). Country is said to be ”popular entertainment for suburban white people”, which has to be clean, conventional and rather performed (in English) by female (white) artists. It is also described as ”the musical version of the white people’s escape from urban centres to suburbs” (Tamminen 2000, 124; MacFarland 1997,74-76). These definitions are valid for the Finnish iskelmä. It is also clean and conventional music for middle-class people, and its roots are in the countryside dance halls. Iskelmä is the musical version of longing that middle-aged, country-born but now urbanized Finns feel for the countyside and the countryside culture of their youth (Valkonen & co 1983, 104; Salminen 1991, 42-43; 52).

The third reason, the similar effects of deregulation, can be illustrated by comparing developments in commercial radio formatting in South and Coastal Ostrobothnia , Finland with Youngstown, Ohio, U.S.A. during 1994-1999. There were six local commercial radios (all FM) in South and Coastal Ostrobothnia in 1994. They were operated separately, and only two had partly common ownership. Only one radio had profiled its music. In 1999, after two deregulatory licencing rounds, the number of stations in those regions was doubled from six to twelve, but the number of station main owners increased only from five to eight. There were now two local multichannel operators with differently profiled stations. Two local stations had dismissed all their editors and started to buy programming services form an outside company. Four of the stations were streamlined national or semi-national network stations. (Ala-Fossi 1995; Ala-Fossi 1997; Ala-Fossi 1999)

In Youngstown, Ohio there were 17 radiostations (8 AM and 9 FM) owned by 10 different companies in 1994 before consolidation. In 1999 there were still 17 radiostations, but after consolidation they were owned by 4 companies. Only one of these companies was operating in Youngstown in 1994. Consolidation has also meant great organizational change in radio stations. The overall number of employees in the Administrative and Engineering departments has been reduced. On the other hand, this has allowed stations to add staff in the Programming and Sales departments. The radio programming changes in Youngstown during this consolidation process were more strategic than made under the market pressure. The main reason for changes was to prevent clustered stations from competing against each other. (Weiss 1999; Hagin & Fox 1999, 2-9)

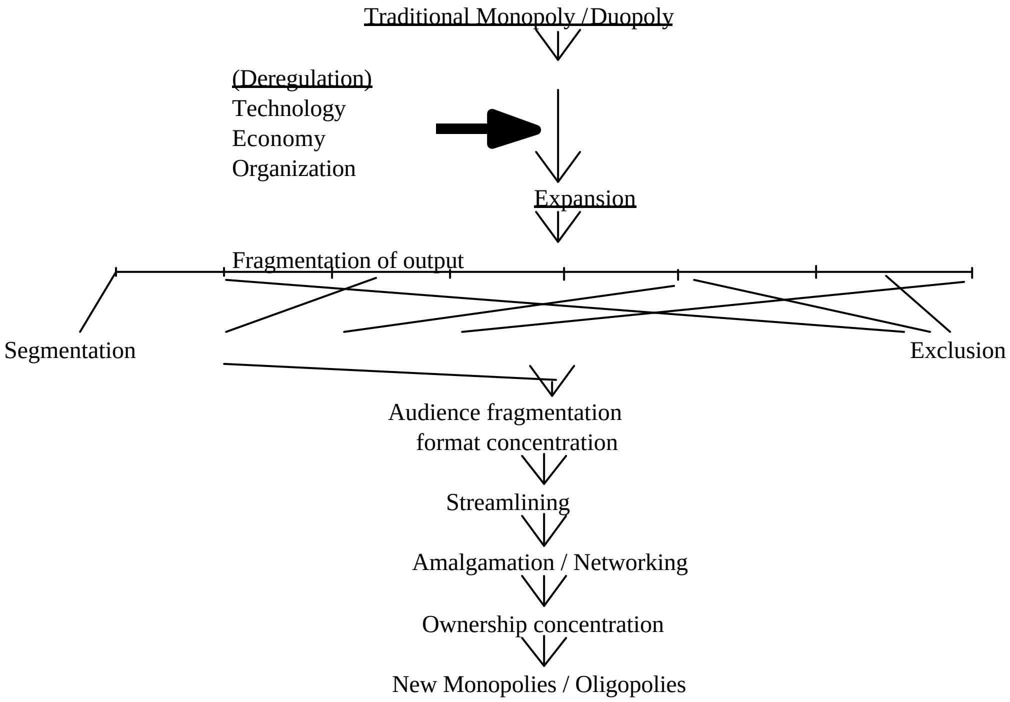
Discussion : Deregulation may produce variety – but how about diversity ?

In the U.S. deregulation has been seen as the best way to help the market to produce and deliver the most wanted radio services in a cost-effective way. The U.S. radio industry has also strongly backed deregulation and promised increased competition. A similar market emphasis can be found in Finland. Moreover, like in many European countries, in Finland there has been an intention to increase the total number and variety of commercial analog (and digital) radio services by deregulation. (Hendy 2000, 216- 217; Brown 2000, 9-17; Ala-Fossi 1999, 24-25, 186)

Despite all of the hidden or publicly expressed intentions, deregulation always produces ownership concentration in the end, just as Krister Malm and Roger Wallis have described in their theoretical model about the effects of deregulation (Malm & Wallis 1992, 219-220).

The logic of media specialization directs the first wave of format concentration of different commercial radio stations after deregulation : the streamlining and focusing to certain target groups. According to Beth Barnes and Lynne Thomson the logic of media specialization requires a certain amount of social differentation. Where there is an increasing amount of products (also music and recordings) and services for special target groups, advertiser need to reach those special groups grows. At this stage adequate audience measurement technology, concepts and basic understanding are needed. An audience that can not be measured, does not exist. Moreover, there must be enough competition between commercial channels or media. If there is also sufficient channel capacity (through deregulation or technology), we end up with more specialized and targeted content and media. This process produces in the first stage many similar kind of competing commercial channels for the same markets . (Barnes & Thomson 1994, 77, 91-92 ; Rosengren, Carlson & Tågerud 1996, 23; Hendy 2000, 217-218)

FIGURE 1. The effects of deregulation



(Malm & Wallis 1992, 219-220)

The second wave of channel formatting begins after ownership concentration, when there is a need for new competition strategies for a multi-channel environment. The logic of media specialization is still valid, but when the same owner has more than one radio station or network in the same market, old strategies for channel competition do not work any more[13]. The main idea of cluster competition is to operate with several different stations or networks so that your stations does not compete with each other, and at the same time the whole cluster of channels can cover the most interesting audience segments well. The effort to avoid “cannibalism” between stations produces more narrow and specific formats for single stations within a cluster- on the condition that it is still profitable to run all those stations.

When the target audiences of the single stations become more specific and narrow, all multi-channel companies have to use many channels to reach the largest possible total audience. This development also requires changes of programming and formatting of stations within a channel cluster for strategic reasons rather than market pressures. It can also mean that companies operating in a multi-channel environment may buy and sell stations just to modify their channel cluster to be more competitive[14]. At least in the UK, commercial radios have argued that this is the basic system for how ownership concentration actually helps to produce diversity. (Rudin 1999, 14; Hendy 2000, 228-229)

[13] For example: Nordberg 1996, 25-38; Carroll & Davis 1993, 175-189.
[14] This kind of portfolio strategy is typical for consolidated companies. (Vanhala , Laukkanen&Koskinen 1994, 93-99)

These findings could be also supported by Peter Steiner's early model of how commercially financed channels affect the programming mix. This model was built on the observation that commercial (advertiser-supported) broadcasting does not directly capture consumers intensity of preferences, only their comparative preferences[15]. According to Steiner, competitive commercial broadcasters tend to concentrate only on certain programme types to maximize their revenue at the lowest possible cost. His results suggested that - under certain assumptions – monopoly reduces the tendency of competive commercial broadcasters to concentrate "wastefully on duplicative mass programming while ignoring the preferences of smaller audiences." (OECD 1993, 81-85) Steiner's model has been heavily criticized, and it has many limitations. Despite this, I believe it reflects how the ultimate ownership concentration decreases format concentration.

After analyzing the changes in the market structure in the U.S. top 50 radio markets, Drushel (1998) concluded that the significant increase of format diversity after consolidation seemed to be related to an increase in advertising revenue, but not to the growth in ownership concentration (cited in Brown 2000, 11). On the basis of Finnish experience, this can not be the basic reason, because deregulation and consolidation have produced variety in format selection while the advertising revenues have not substantially increased. This is not to say that the growth of or decrease of advertising income would have no effect on programming strategies, but it is not the only determining factor. Still it is very likely that consolidated multi-channel radio companies will concentrate their services on the most profitable target groups (Hendy 2000, 229), if advertising revenues begin to decrease. We might see this happen if the U.S. economy descends into a deep recession ?

The main problem is still that deregulation may produce increasing variety in programming through ownership concentration, but it does not produce real diversity in programming. Program variety in a channel cluster with the same solid corporate values in every channel is quite far from true diversity. A heavily concentrated and consolidated commercial radio business is no better than state monopoly from a consumer or citizen viewpoint (Martin 1994, 261). Does it really matter for the listener how the company's dominating market position was created : with political or economical actions ? Even the FCC in the U.S. has identified that there might be different kinds of diversity : outlet diversity, source diversity, voice diversity and program diversity - although all of these examples were about television (Brown 2000, 19) .

Even if the station ownership and the content, as well as the variety and values of its programming are deeply intertwined, it seems that one can not achieve set goals concerning the program content only via ownership deregulation. On the other hand, content regulation aimed at nourishing diversity is very difficult to carry out and can not be effective without parallel ownership regulation (Brown 2000, 26). In this light, it is interesting that while the EU is formulating its policy for regulation of digital broadcasting, it wants to separate the infrastructure regulation and the content regulation (Levy 2000, 7). This may be a good idea, because the efforts to take care of both of them with a single policy decision have been ineffective.

Nothing can beat market forces ?

From an industrial point of view, the more important aspect of ownership concentration and consolidation is better productivity and profitablity. Deregulation gives an opportunity for the big companies to grow even bigger (Brown 2000, 10). Consolidated companies operating with many channels can increase profits by recycling and replicating program material and via rationalization

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[15] Paul Klein's Least Objectionable Program (LOP) theory has actually the same idea: people will not tune in for the best show, but they will tune in for the least objectionable program that is on. (MacFarland 1997, 13)

of station operations. Stations in one cluster or network can cut expenses by combining their functions and reducing total employees.

In the U.S. deregulation and the ability to consolidate is seen as one of the main reasons for continued growth of the whole U.S. radio industry (Hagin & Fox 1999, 2), but in Finland consolidation has so far meant economic growth only for the biggest operators. In 1999 Radio Nova and SBS Radios grabbed over 65 percent of the total 226 million FIM (about 35,5 million USD) turnover of commercial radio in Finland, while the total growth of industry was only about 0,5 percent. At least half of the almost 60 commercial radios in Finland were still unprofitable.

SBS Radios have recently demanded even more consolidation in Finland with business reasons. They argue that ownership concentration is the only way to keep the industry vital condition (A-Studio 15.1.2001). This discussion is connected to the digitalisation of radio broadcasting in Finland because the latest degulatory decisions were made to let the industry raise enough money for a smooth transition to digital broadcasting. The Finnish government allowed increasing consolidation to create more profitable commercial radio companies because small, poor and strictly local radios would not be able to take part of the investments needed - and it is likely that this kind radio could not afford to pay for a regional frequency in the DAB (Eureka 147) multiplex. In this fashion the commercial radio licencing policy objectives are twisted to be exactly the opposite of the original idea of local radio in Finland back in 1985. (Mykkänen 1995, 15, 24).

But the effort to achieve some policy objectives by deregulation seems again to fail. Now even the biggest and most successful commercial radios in Finland are not interested in DAB. The first part of the national DAB network was launched in 1999 by YLE, but only about 200 DAB receivers have been sold in Finland so far. A total audience of this size has no commercial value. No wonder that DAB is already said to be an acronym for ”Dead And Buried”. Instead of making investments in digital radio, commercial radios in Finland would like to make bigger profits with more consolidated analog networks and in the case of SBS, to invest next in digital television. (Grönlund & Pönni & Rannikko 1999, 66 – 67; Markkinointi & Mainonta 3/2001; Kauppalehti 22.2.2001; Markkinointi & Mainonta 7/2001).

The U.S. case indicates that deregulation produces economic growth in commercial radio and variety of programming, but at the price of simultaneous and heavy ownership concentration, atrophy of independent local radio and a decrease of diversity. In a peculiar way, the FCC Chairman William Kennards proposal for microradio after the massive consolidation of broadcast radio in the U.S. and the following launch of new low-power FM radio remind one of the situation in Scandinavia in the mid-1980’s. There is a similar need to break the dominating market position of big companies, idealistically expand citizen access to the airwaves, embrace freedom of speech and increase community participation via new kind of locally oriented media. (Brown 2000, 9; Stavitsky, Avery & Vanhala 2000, 1-3)

If Finland should learn anything about the results and the aftermath of the consolidation of the U.S. radio industry, it is that the continuing liberalisation of licensing policy and ownership regulation is not effective against new monopolies (Mykkänen 1995, 29) nor can this achieve more diverse and pluralistic Finnish radio media in the transition to a digital age.

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