

For the course "Finnish Media and Communication System"

Freely adapted from "Suomalaisen televisiotarjonnan lähistoria" by Aslama, Hellman, Sauri (2002) Helsinki: Statistics Finland and "Does Market-Entry Regulation Matter?" by Aslama, Hellman, Sauri (forthcoming in Gazette, 2004)

Minna Aslama

17.10.2003

"Dumbing Down" or "Diversification"? – The Past Decade of Finnish Television

Tabloidization of TV in Finland – A Case and its Context

"Trash, filth and nonsense. Programs challenging the limits of good taste have entered television", acclaims a full-page article in Helsingin Sanomat, the biggest Finnish daily, on 4 April 2002. One of the foci of the story is the weekly programming slot that has been officially christened as "Trash Thursday" in the commercial TV channel Nelonen. The following day, the headline "Nonsense or public service?" leads the story reporting on a seminar on the challenges of public service broadcasting and increasing competition, in the Journalists' Union's journal Journalisti. In the same publication, the Foreign Minister Erkki Tuomioja has noted just a few months earlier that he does not watch television any longer, as any sensible, fully argued opinion or analysis is impossible on the screen, and as "there is so much absolute trash". Later that year, the executives of the public service Finnish Broadcasting Company (hosting channels TV1 and TV2) and of the two nation-wide commercial channels are given a chance to defend themselves in a televised discussion.

The above discussion on the quality and morals of the media is not a new debate, neither is it a Finnish curiosity. Instead, here, as for example in Britain, the debate seems to appear in cycles. It also seems that this time the discussion tends to circulate particularly around television. In the debate, the trend described with the term "tabloidization" – that derives from press history – is often used synonymously with the slogan "dumbing down": It is coupled with the worry of media economists who note that when competition in media markets gets tougher, the situation lowers the standards of the media and forces everyone to compete with similar kinds of programmes – to supply "more of the same".

Structural Turmoil

The current "tabloidization/dumbing down" debate may just reflect other phenomena taking place in the media landscape nation-wide and even globally, especially regarding television. Clearly, many of same major changes in the past decade have occurred in Finland as elsewhere in Europe (Dahlgren 2000): these transformations range from legislative deregulation, commercialisation of markets as well as of attitudes towards public service broadcasting (PSB), to individualisation of culture and thus fragmentation of audiences. As in many European countries, also in Finland media policies changed radically in the 1990s. Regarding broadcasting, the legislation and licensing practices were altered, and in the television sector, this "managed liberalisation" led to a dual system. While most European countries today operate by dual systems of various kinds, Finland provides for a particular case study of the changes in television landscape in the 1990s: that of the shift from companions to competitors (see Hellman 1999). The literal "companionship" of commercial broadcasting with the public service Finnish Broadcasting Company (YLE) began almost from the beginning of Finnish TV: the commercial broadcaster Mainostelevisio (MTV) supplied programs and advertising in between YLE's programming. The era of dual system began in 1993 with the start of the commercial MTV3 channel. As at summer 1997, another nation-wide commercial channel Nelonen ("Channel Four") entered the

market. **Figures 1** and **2** illustrate the change in Finnish television structure, both in terms of players in the field and in terms of governance of television operations, in the past ten years.

Figure 1. Finnish television system 1993

(adapted from Österlund-Karinkanta 1993, Appendix 1)

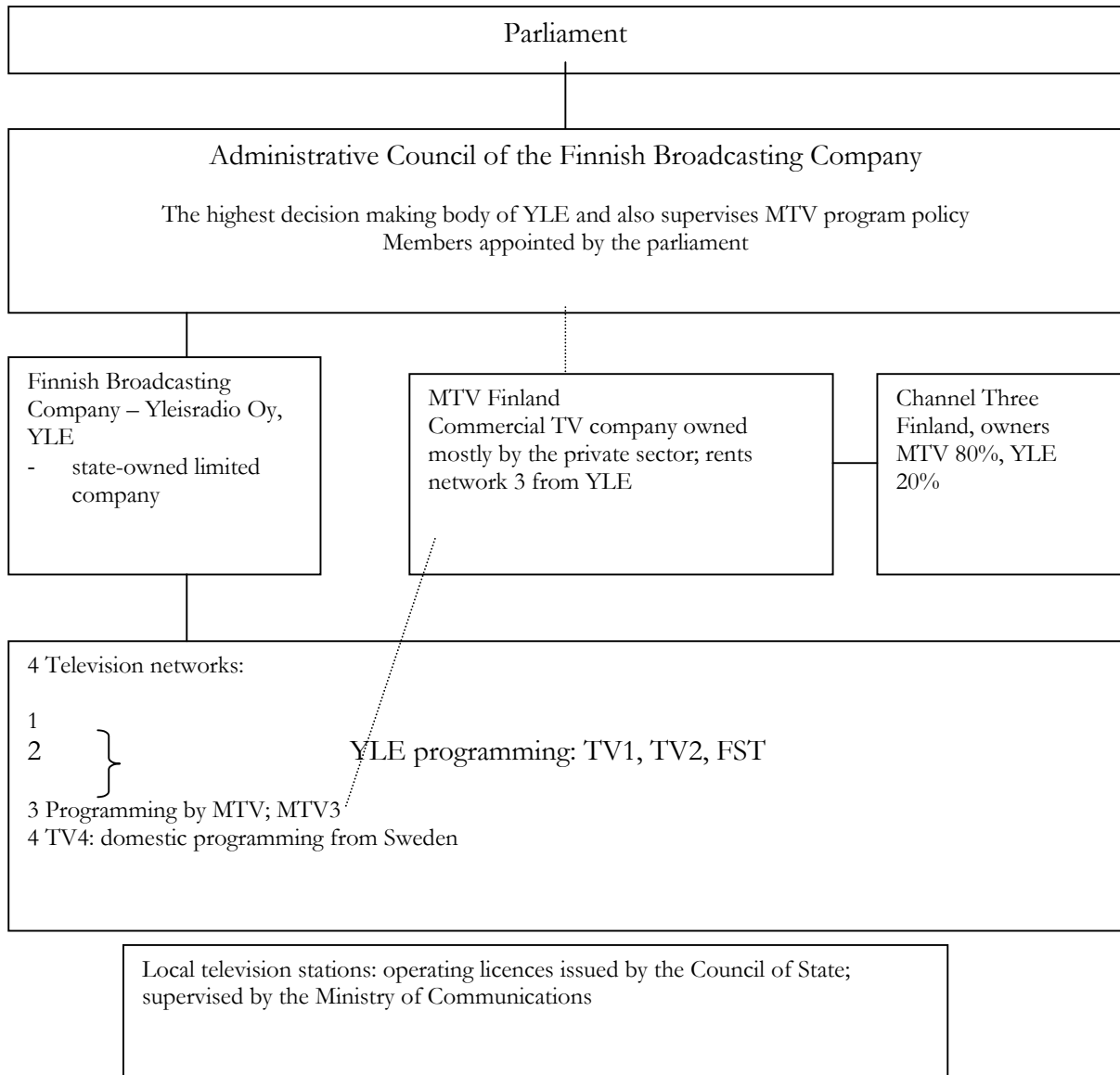
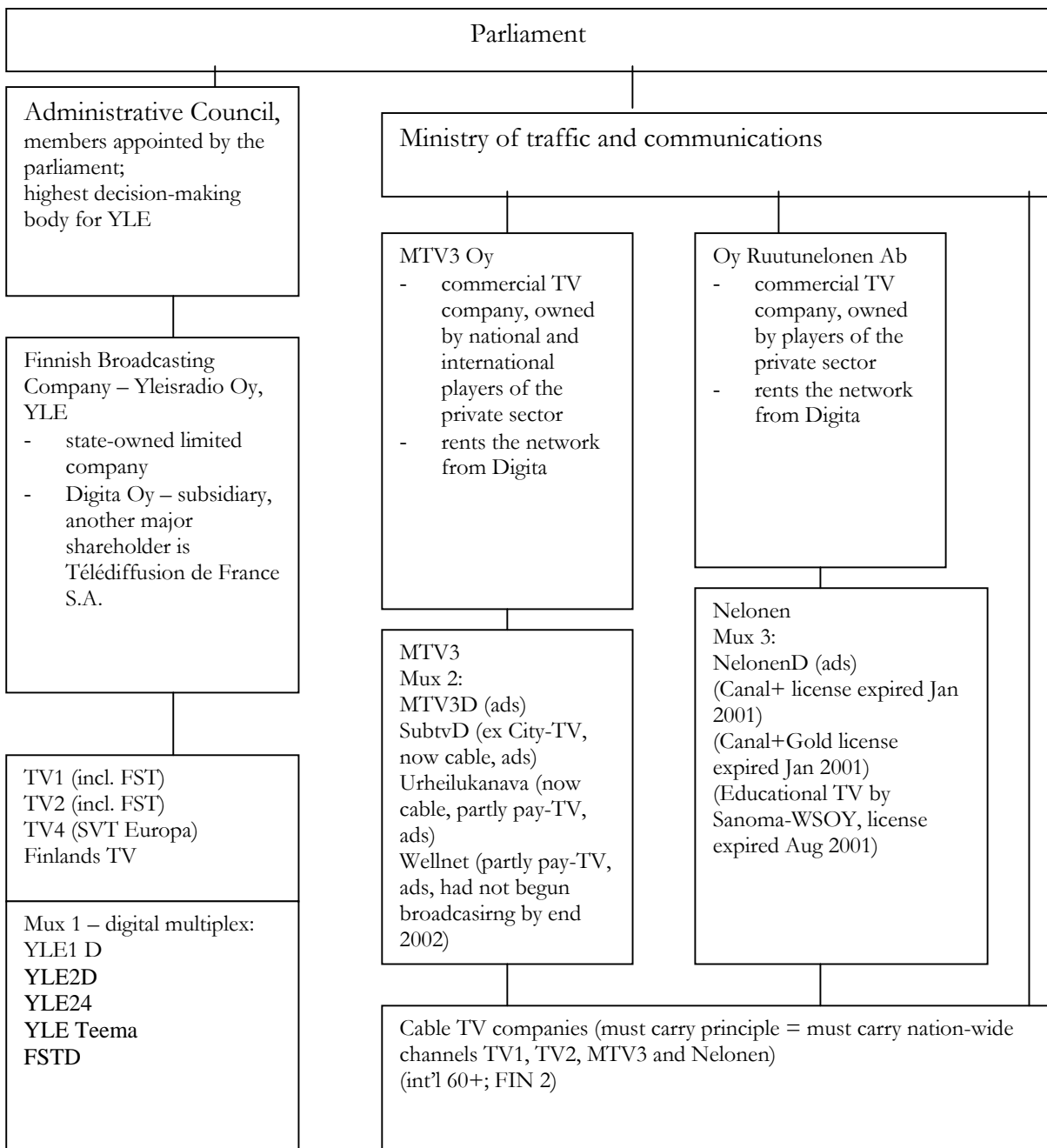


Figure 2. Finnish television system 2002 (adapted from Wiio 2001, 119)



The birth of the “new” channels, especially the emergence of Nelonen – whose programming caters plenty of popular (Anglo-American) entertainment-oriented series for younger audiences – seems to have once again provoked worried debate on dumbing down of Finnish television culture. Coupled with this discussion are both debates for and against public service television broadcasting and the new tasks and missions public service broadcasting should take, as well as the arguments stating that more television output and competition does not increase diversity – i.e., different kinds of genres, programs, and ultimately, voices – but produces “more of the same”.

Diversity and Policies of Change

As depicted above, until 1993, the main principle in Finland was that the diversity of television program supply would be best realised in the programming of the public service Finnish Broadcasting Company, and, under its supervision, in the programming of the commercial MTV3 which operated in YLE's channels. In 1993 this traditional symbiotic model of public service and commercial television was finally buried and commercial television was detached from the public service broadcasting operations. MTV was granted an independent operating licence and it moved to its own channel.

MTV3 is now part of Alma Media, Finland's second biggest mass communication company, created in 1998 through the merger of the major newspaper publisher Aamulehti Group and MTV3 Finland. Following the 1993 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 – and the second commercial – channel Nelonen (Channel Four Finland) started programming in the summer 1997. The channels main shareholder is Helsinki Media Company that in 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 and the second biggest in Scandinavia. As far as the public service YLE is concerned the current situation is contradictory: On the other hand the company wants to keep its own ratings high for the reasons of legitimacy, but on the other hand, the funding structure creates a situation in which it is also in YLE's interests that commercial channels have good ratings. (Sauri 2002.)

In this new situation, it seems that media policies regarding television output are created on the basis of market competition. When the Finnish government proposed the new legislation on television in 1998, it in fact reversed the traditional ideology and argued that the role of the public service would be to fill in the gaps left in the television supply by the commercial players in the field. Today, then, the Finnish dual system is governed, on one hand, by the Act on Yleisradio Oy¹; and, on the other hand, by the law governing commercial radio and television operations. Financially, the new legislation still endorses the public service fee, now renamed as the operating licence fee. It is statutory and extended to apply to all television companies with a turnover exceeding 3.5 million euros/dollars, as from 1999. This can be used to finance the activities of YLE but also to promote other television (and radio) operations. Another new principle is that the authority governing the licensing, i.e., the Ministry of Transportation and Communications, should not give specific orders for those operating in the television and radio markets. At the outset, the emphasis should be in the general outlines of programming, not in setting demands for specific content matters. (Government 1998).

Based on the above, YLE's public service channels (TV1 and TV2) and the commercial channels (MTV3 and Nelonen) are thought to compete with one another and thereby complement each other. (e.g., Hellman 1999). The Act on YLE states, among other things, that "the company shall be responsible for the provision of comprehensive broad-casting services for all citizens under equal conditions". The law governing commercial radio and television operations legislates that the Ministry must in its policies enhance the freedom of speech as well as ensure diversity in programming and safeguard the needs of special audience groups.

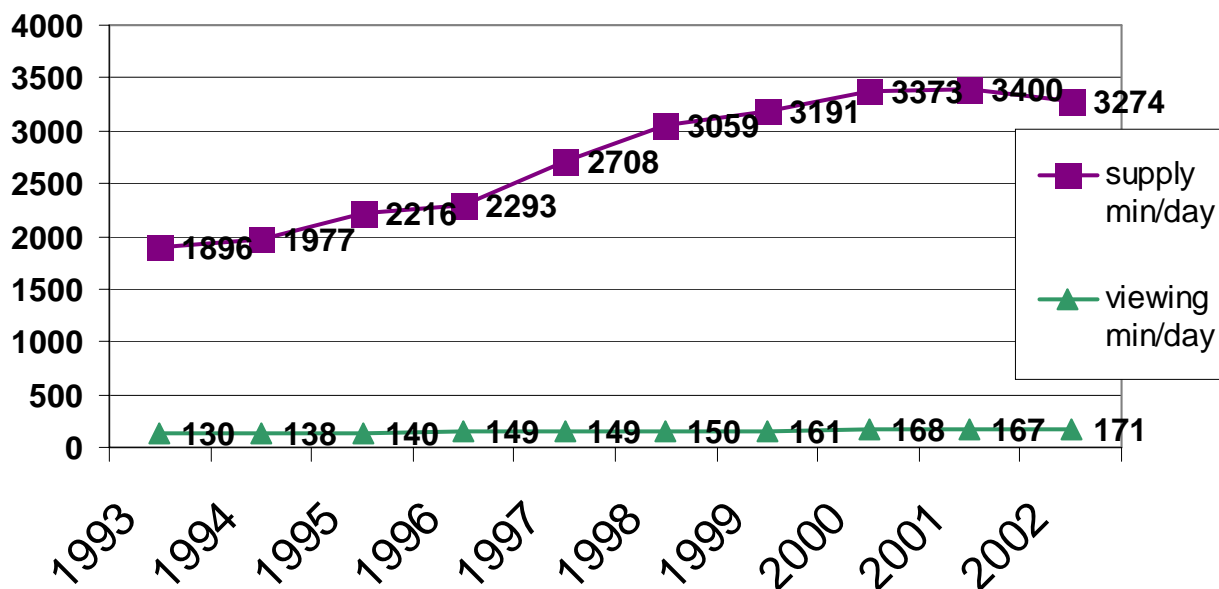
This policy on diversity is crucial also in the situation where Finland has officially entered the digital television era as at 27 August 2001. The birth of digital television, development lead by YLE, has not been easy. Originally, altogether 13 operating licences for digital channels were granted, of which five were for PSB. Despite of the slow, delayed start, the digital era has already given birth to three brand new public service channels. While as at late autumn 2003 there were still only some 126 000 households with digital analogue/cable transmitters – a figure that indicates that some 5.9 percent of all

¹ For the English translation, see www.yle.fi/fbc, read on 30 Dec 2002.

Finns can watch digital broadcasts² – the figure has grown slowly but steadily and development of digital television broadcasting is evident. Commercial channels are therefore expected to follow in full force as soon as there are enough audiences to justify their full operations. The question of diversity of programming emerges once again, as many specialised channels are about to enter as novelties in the Finnish television landscape.

In the 1990s, the above described developments have resulted in a major change, to put it in economic terms, both in supply and demand of television programs. As the **Figure 3** depicts, the viewing time on an average day has grown over 40 minutes in a decade, equalling a growth of some 30 percent, from 1993 to 2002. Yet, in relation to viewing, the change in Finnish television program supply has been even more dramatic: It increased by 73 percent from 1993 to 2002, equalling 23 additional program hours per day in 2002. Between 1993 and 2002, TV1 expanded its weekly programming hours by 59 per cent, TV2 by 40 percent, MTV3 by 67 percent, and even Nelonen during its first six years by 39 percent (Aslama and Wallenius, 2003; Statistics Finland, 2002). In other words, not only did the Finns gain a new nation-wide analogue channel, but all the channels have expanded their program supply. This development has in its part contributed to the birth of numerous independent producing organisations. The past ten years have also witnessed the entrance of international companies in the field, the birth of youth-oriented cable channels in the end of the last millennium and their death in the beginning of the this one, the birth of convergence tendencies of print and electronic media organisation, the birth of true channel competition and the related restructuring in both commercial and public service side, and the slow and difficult birth of digital television broadcasting.

Figure 3. Television supply and viewing (min/day) in the nation-wide channels, 1993-2002



Sources: Supply: Hellman 1999 & MOTC 2003; viewing: Yle Audience Research/Finnpanel Oy.

How to study change?

The question whether the recent changes have caused a dumbing down or a diversification and much-needed competition, resulting in a healthy division of labour between the channels, is a complex issue to examine. Sparks (2000, 10-11) uses the general term “tabloidization” to apply with all media and

² Press release, Finnpanel Oy, Oct 2003, www.finnpanel.fi, read on 17 Oct 2003.

defines it as processes of change in media contents; shifts occurring in three distinct, if overlapping levels:

1. Shift in the priorities within a given medium, away from news and information toward an emphasis on entertainment.
2. Shift in priorities within journalism toward more entertainment orientation and foci in the private sphere, away from the traditional "serious" journalism and public foci.
3. Shift in modes of television culture, often realised as "the shifting boundaries of taste" within different media forms; mixing and challenging the conventions of what can be talked about, and by whom.

Here, the focus is in tracing tabloidization/dumbing down, and on the other hand, diversity in the Finnish television's close history, with the overall account of Sparks' item number one. The empirical analysis presented below as evidence is based on the studies "Finnish Television Program Supply 2000", "Finnish Television Program Supply 2001" and "Finnish Television Program Supply 2002", commissioned by the Ministry of Transportation and Communications (MOTC 2001, 2002, 2003). The studies' main goal was to quantitatively describe the supply in 2000-2003 and to compare it to that of the years 1997-99. Also, a decade of Finnish television supply could be examined when including the data of 1993-1996 from an earlier research (Hellman 1999). The analysis depicts program supply as a whole and by channels. It describes the distribution of program types, origin of programs, serial programming, as well as weekly and seasonal variation. In addition, it examines the alleged change of the Finnish television output with the concepts of diversity and dissimilarity, here understood as quantitative, mathematically measurable features of the output.

The data has been acquired from the channels' own databases as well as on the People Meter data gathered by the commercial company Finnpanel Oy. It consists of 42 sample weeks in 1997-2002 (i.e., the weeks 5-7, 27-28 and 42-43 each year) and 16 sample weeks (6, 7, 42, 43) for the years 1993-96³. The data covered altogether 58 sample weeks and more than 37,000 programs. The classification of program types includes the following categories: news, current affairs, factual programs, cultural programs, service and hobby-oriented programs (i.e., so called personal interest programs), sports, domestic fiction, foreign fiction, movies, children's and youth programs, educational programs, entertainment, other programs. This categorisation closely follows the standardised typology used by the Finnpanel Oy and by the channels themselves; it has been only slightly modified in order to even out the distribution of the data in categories and to provide more detailed information on program output.⁴ The unit of analysis is the individual program and the absolute amounts and the relative shares of different program categories are calculated in program time of each program (not by number of program titles) thus representing the way total programming time is distributed among different categories.

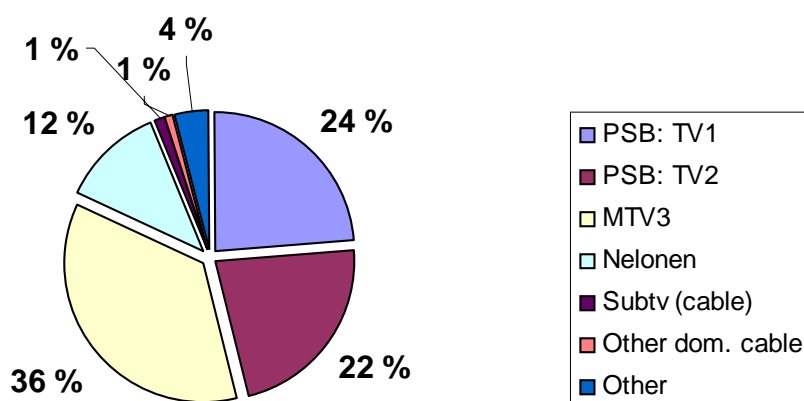
³ Hellman's (1999) data has been recoded to correspond classification depicted here. Advertising and announcements as well as "non-traditional" programs such as televised mobile chats, mobile phone-assisted games and shopping channel broadcasts, have been excluded in the data.

⁴ Finnpanel's standardized categorization consists of news, current affairs, factual and cultural programs, movies, domestic fiction, foreign series, children's programs, sports and entertainment (www.finnpanel.fi). In this study, the program types cultural and educational programming as well as service and hobby-oriented programs have been derived from the category of factual programming. In addition, the category of other programs has been used to describe miscellaneous programs such as program information, and other short "fill in" programs.

Finnish television program supply in 2002

In order to set the stage for examining and evaluating possible shifts in Finnish television supply, the situation of 2002 is first depicted below. The four nation-wide channels – TV1, TV2, MTV3 and Nelonen (Channel Four) – offered 55 hours of programming per day. This equals to some 382 hours of programming per week. The average viewing time in 2002 was 171 minutes, and as depicted in the **Figure 4**, the largest share was spent with the commercial MTV3. The nation-wide commercial channels together reached a larger share of audiences than the public service channels, but YLE television as a whole still exceeded the single commercial channels in its audience share. Subtv, the digital channel broadcasted also regionally via cable, as well as other cable and satellite channels, played a relatively little part in Finnish television viewing. In media economic terms, despite of the commercialization and deregulation, the small Finnish television market is somewhat concentrated, as only few players dominated with major audience shares.

Figure 4. Share of Finnish television viewing by channel in an average day, 2002.



Source: TV Meter data; Finnpanel Oy, www.finnpanel.fi

The overall look at the Finnish television programming in 2002 shows that one fourth of all nation-wide programming was foreign fiction. Another 25 per cent consisted of current affairs and sports programming. Entertainment and movies both had a share of some ten percent. The smallest program categories were domestic fiction, cultural, and educational programming. As could be expected, prime time⁵ programming hours altered the situation: Foreign fiction still amounted to the largest single program category, but entertainment, movies, and, on the other hand, the news programming, gained larger shares than in overall program supply. Although foreign fiction had a major role in the Finnish television program output, one half of all programming were of domestic origin. Serial programming dominated program supply with a share of some 80 percent. Reruns comprised close to one fourth of all programs.

In comparison to the few past years, 2002 seems to have reflected the difficult financial situation that especially the commercial broadcasters had faced. Since the start of its own channel in 1993, the turnover of MTV3 had rapidly grown, but the situation was reversed when Nelonen entered the market. Also, the television advertising – that in Finland is some one fifth of all advertising expenditure

⁵ Here: programs that begun between 18.05 and 22.05 hours.

and thus significantly lower than the European average – has in recent years shown signs of a decline. (Sauri 2002, 113.)

As already shown in **Figure 3**, television program supply, then, had grown steadily from 1993 on. Since there was hardly any change in the amount of programming from 2000 to 2001, it could be said that by this time, the situation of four nationwide channels had reached its peak. Also, in overall output, the share of domestic programming increased steadily from 1997 to 2001. However, the competition seems to have become fiercer, and the year 2002 was the turning point when it comes to program supply. The total Finnish analogue program supply had decreased slightly from 2001 to 2002. Although TV1 increased its output and TV2 remained at the level of the previous year, the commercial channels Nelonen and especially MTV3 cut down in program time. Instead, they offered televised mobile chats and games, as well as slots dedicated to shopping television. In addition, the overall share of domestic programs had diminished somewhat, due to its decrease in commercial channels. MTV3 decreased the program hours in particular by broadcasting less entertainment, but the channel also cut down the supply of hobby programs, sports, and current affairs.

Channels: Division of Labour in 2002

In 2002, as in the past years, the public service TV1 of YLE offered the most information-oriented programming of the four nation-wide analogue channels. TV1 emphasised the supply of current affairs, factual and educational programs, as well as the news genre. The channel focused on domestic and European productions.

TV2's program profile was not clearly dominated by any genre. Sports programs formed the largest single program category, with a share of some 20 percent of the channel's output, followed by factual programming, foreign fiction, current affairs and children's programs. As the other YLE channel TV1, also TV2 included a very high share of Finnish programs that amounted to over 60 percent of the channel's total supply.

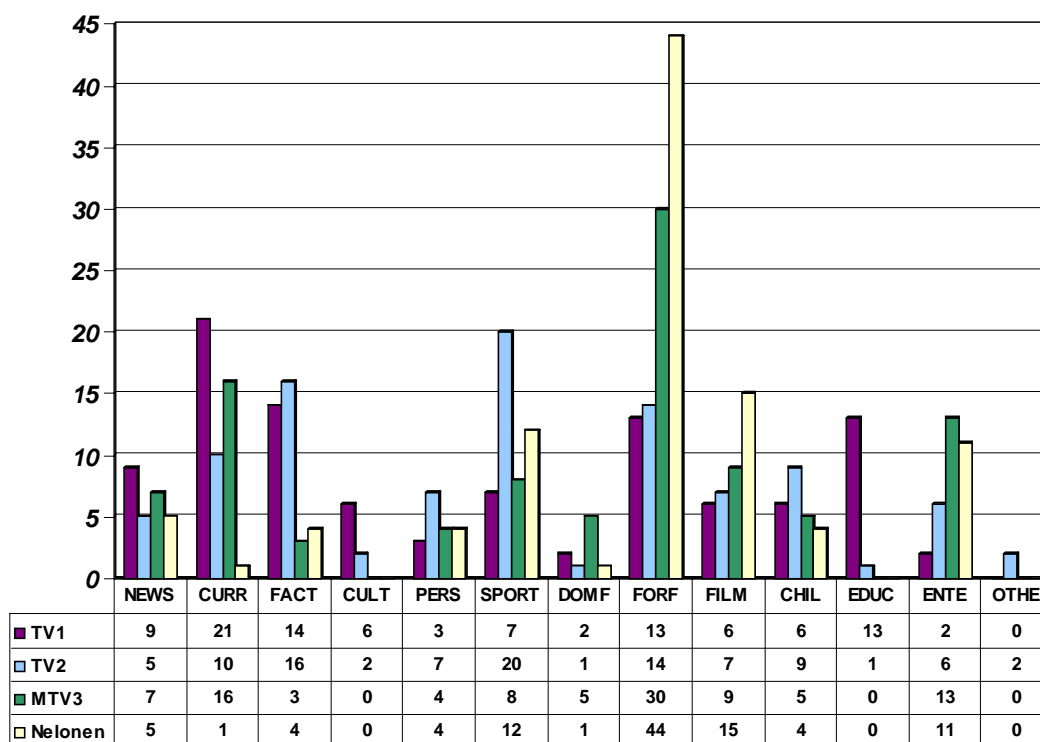
MTV3's profile was comprised of two thirds of entertainment and one third of information-oriented programs. The origin of programs was clearly polarised: one half of the channel's output was of domestic origin and almost 40 percent of the supply were productions from North America.

Nelonen was clearly focused on entertainment-oriented program types that amounted to approximately 80 percent of its program output. The channel built its profile on foreign fiction and allocated the genre a share of 40 percent in the total output. Also feature films, sport, and entertainment had relatively large proportions in Nelonen's programming time. Nelonen was the only one of the four channels that favoured foreign productions over Finnish programs. Almost one half of the channel's programs came from North America, one fifth of the supply was of European origin, and only less than one third consisted of domestic productions.

The above described division of labour of the channels is illustrated in the comparison of specific program types (see **Figure 5**), and can be summarized as follows: the PSB and the commercial channels seem to have clearly differing strategies regarding program types. Traditional factual and cultural programming, domestic children's programming and educational programming were in 2002 genres that in practice were seen on TV1 and TV2 only. Educational programming played an important role in TV1's program profile, thus corresponding to the PSB mandate, in Finland depicted in the Law on YLE, to inform, entertain and educate. TV2, then, specialized in sports programmes. The commercial MTV3 and Nelonen offered a notable larger share of entertainment programs than the

PSB channels, and Nelonen, as already noted, could be called the major channel for foreign (serial) fiction.

Figure 5. Program types by channel, 2002 (%)



Swedish Full Service

A special feature of the Finnish PSB television programming is FST, the Swedish-language service. It is not a separate channel, but its programs are part of YLE's programming both in TV1 and TV2. This is in agreement with the Law on YLE which states that YLE should "treat in its broadcasting Finnish and Swedish speaking citizens on equal grounds and to produce services in the Same and Romany languages and in sign language as well as, where applicable, also for other language groups in the country". In the Finnish public service television there are some other single programs that address this part of the Law, for instance the newscasts translated in sign language. In addition, in November 2001 YLE announced that Same language TV programming will be broadcast jointly with other Nordic countries. Nevertheless, FST can be seen as a special case in that it forms a separate program unit and has also started its own digital TV channel. Also, the MOTC studies focused on FST as an example of minority programming in Finnish television.

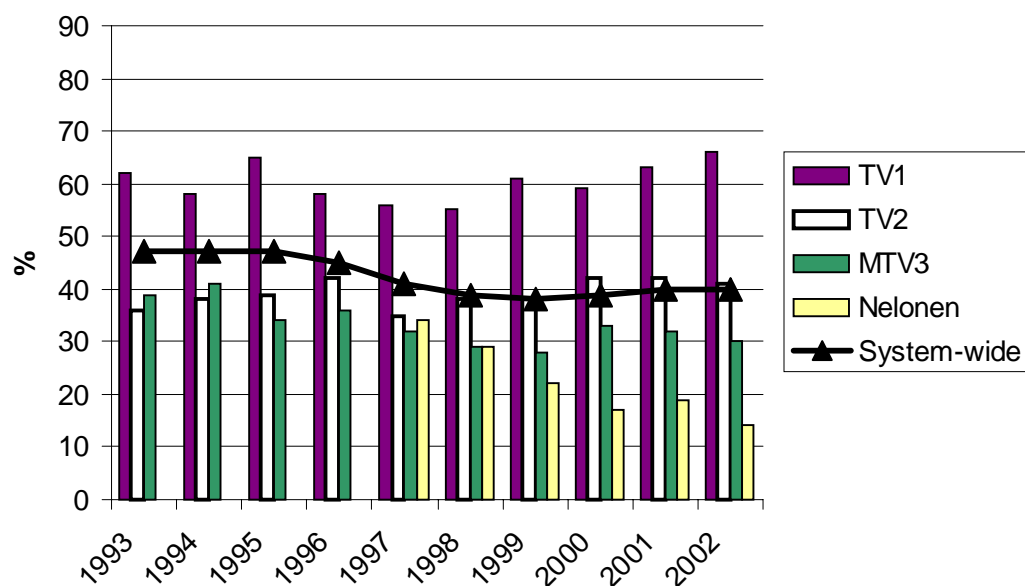
In 2002, FST broadcasted approximately 17 hours per week, i.e., its programming comprised four percent of the total program supply, in accordance with the share of the Swedish-language minority. It formed some nine percent of YLE television output and its overall audience share was ten percent among the Swedish-speaking population; but if its share is calculated relative to its program hours, the share is one third of viewing during that time (Yleisökertomus 2002). In 2002, the analogue output of FST amounted to some nine percent of YLE's total analogue supply. Despite of its relatively few program hours, the Swedish-language television offered practically a full service, although the supply

focused on information-oriented genres. A comparison between FST's analogue supply and the digital FST-D channel shows that the latter has a somewhat more "balanced" profile regarding information and entertainment-oriented programming. FST can be seen as an example of an explicit and ideologically "traditional" public service operation, responding to YLE's legislative mandate with a variety of program types.

Changes 1993-2002: Information and entertainment

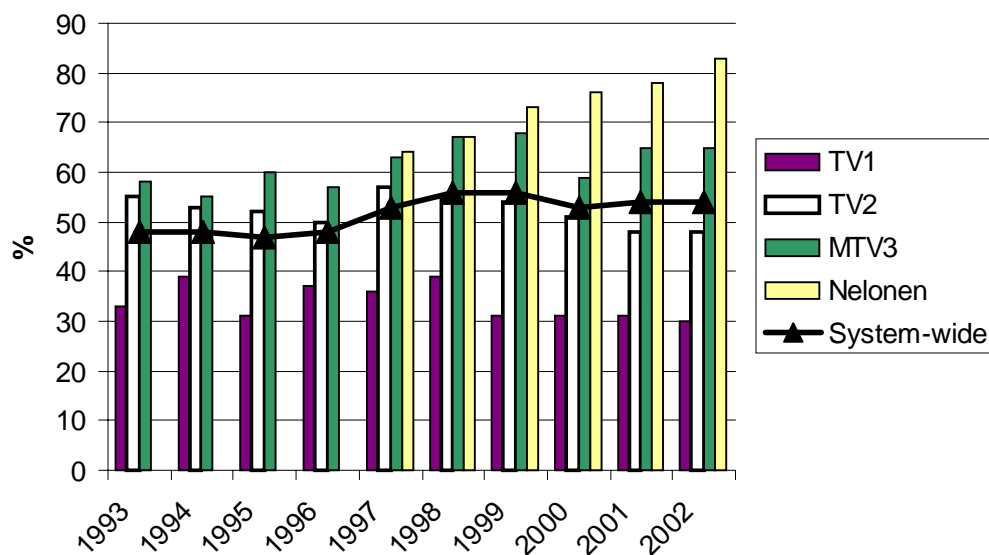
A look at the current television supply in Finland shows that all the channels follow a generalist mission, yet have certain distinctive features. Based on the analyses above, it could be noted that at least at the overall programming level, the channels seem not to engage in extensive "dumbing down". However, it could be suspected that the increasing entertainment orientation might be a process; a development that is often accredited to the growing commercialisation. **Figures 6** and **7** depict the shares of informative and entertainment-oriented programming⁶ by channel since the birth of the commercial MTV3 in 1993.

Figure 6. Share of information-oriented programming, 1993-2002



⁶ Information-oriented program types are here categorized as follows: news, current affairs, factual programs, cultural, personal interest, and educational programs. Entertainment-oriented programs are: sports, domestic and foreign fiction, movies and entertainment. Consequently, the shares of information and entertainment oriented programs do not add up to 100 percent of the supply, as children's and other programs are left outside of this condensed categorization.

Figure 7. Share of entertainment-oriented programming, 1993-2002



The figures indicate that although no fundamental change can be detected, the birth of Nelonen brought about an increase in the proportion of entertainment-oriented programming of the Finnish system-wide program output. In terms of absolute program hours, the change seems drastic: in 1993, three channels together offered some 15 hours of entertainment-oriented programming per day; in 2002, the amount had doubled as the four nation-wide channels broadcasted altogether 29 hours of entertainment genres per day. In relative terms, the increase was not as dramatic but the overall share of entertaining programs had exceeded 50 percent of total supply since 1997. There had been a slight decline of the proportion of informational programs before Nelonen's entry to the market, but their share had as at 1998 remained stable.

As for the individual channels, the public service has maintained a division of labour throughout the years amongst the two channels TV1 and TV2. Perhaps the companionship of TV1, TV2 and the commercial predecessor of MTV3 (that broadcasted in YLE's channels) had also prepared them, as no major adjustments were made in the first years of MTV3. Clearly, TV2 and MTV3 were the real rivals, with a similar emphasis on both informative and entertaining supply.

It was the start of Nelonen that brought about the change in this situation. The channel, targeting especially younger audiences than its competitors, offered from the start a variety of program types but decidedly still built its profile on Anglo-American fiction. The major increase in the total system-wide supply was clearly caused by the addition of the fourth channel in the overall system. It could be thus argued that Nelonen contributed to some "dumbing down" of Finnish overall supply, as its output increased the overall amount of entertainment and fiction on Finnish small screens.

It is also evident that the birth of Nelonen first resulted in some increase in the entertainment-oriented programming in all channels, notably in TV2 and MTV3. They and Nelonen seemed to position themselves quite similarly in the information – entertainment axis in the first year of the newcomer in 1997. From 1998 on, however, the tendency in the public service channels has clearly been that of the decrease of entertainment. After some fluctuation, MTV3 has slightly but steadily decreased informational genres and increased entertainment-oriented programming since 2000. The same tendency has been very evident in Nelonen's programming right from the start.

Generally, however, the Finnish television channels created and maintained a division of labour in the factual – entertainment axis, in that TV1 positioned itself in the most information-oriented end of the scale, followed by TV2 and MTV3, while Nelonen could be found in the most entertainment-oriented position in the axis.

5. Changes 1993-2002: Program diversity and dissimilarity

The shares of information and entertainment-oriented programming reflect broad groupings of programs, and thus, do not depict the variety and distribution of program types within channels. In other words, they don't measure how diverse the program output is. "Diversity" is a broad concept and regarding media contents, can mean demographic representation (e.g., gender portrayal) or the diversity of ideas and opinions (McQuail 1992). However, to quantitatively address a possible process of "dumbing down", specialization (or narrow output) as opposed to a generalist and "balanced" channel profile, the definition of the concept here is derived from media economic and policy studies: In that context, diversity means the variety and balance of program output of a single channel as well as of a channel system. The more program types are represented in program output, and the more "evenly" they are distributed, the greater the diversity of programming (e.g., Hellman 2001).

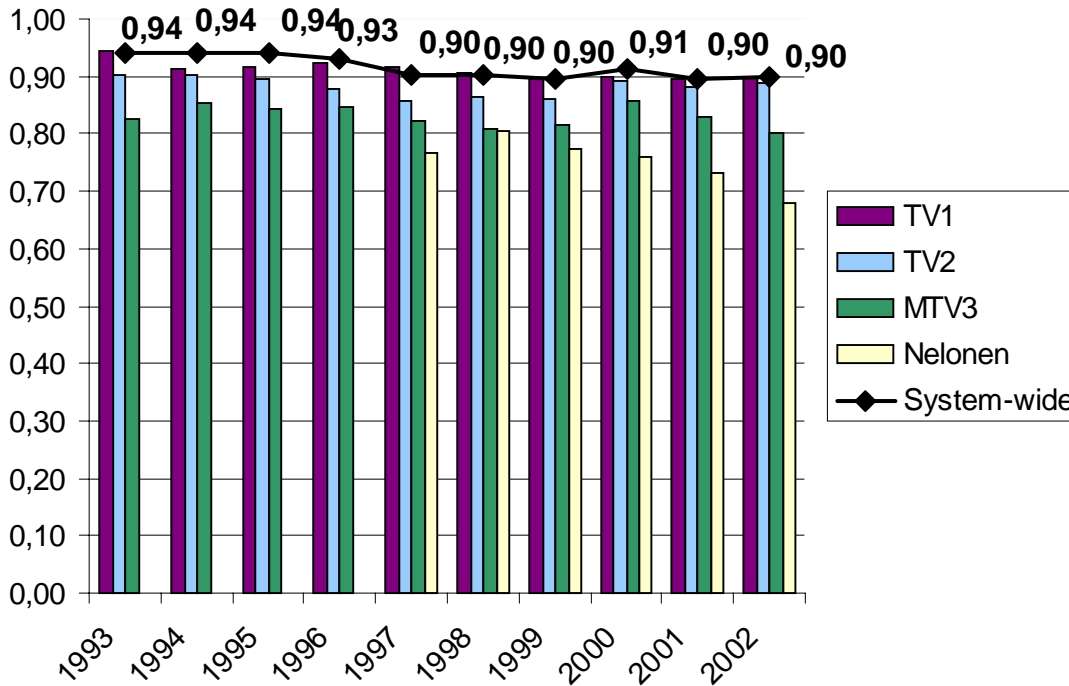
For this purpose, program diversity was measured by mathematical formula of the "Relative Entropy Index", a commonly used method in diversity studies that look at contents in the overall, programming level. (Hellman 1999 & 2001; see also Hilve et al. 1997; Ishikawa et al. 1996; see Annex for formula.) The Relative Entropy Index represents the sum of likelihoods for the different genres to be broadcast on television, or the balance between various genres on a channel or channel system. The basic principle of the index suggests that the more even the distribution of program types, the higher the relative entropy score. Relative entropy scores vary between 0 and 1, with 0 expressing minimum diversity (i.e. all content in one category) and 1 expressing maximum diversity (all categories equally large) (Hellman 2001, 191). Hilve et al. (1997) have proposed a scale for the interpretation of relative entropy scores, used also in the study in question: 0.01-0.34 equals very low diversity; 0.35-0.54 low; 0.55-0.69 medium; 0.70-0.79 high; and 0.80-1.00 very high diversity.

Figure 8 depicts the Relative Entropy Index for the years 1993-2002 in overall supply as well as by channel. The figures show that the diversity of Finnish nation-wide channels has been very high for the past ten years. The public service channels TV1 and TV2 proved to be the most diverse, followed by MTV3. Nelonen was clearly the most "narrow" of the channels, although it, too, scored for high or medium diversity. During the period of ten years, there is a slight downward trend in diversity figures, which coincides with the commencement of Nelonen.

Following its long tradition of broad program offerings (Hellman and Sauri, 1994; Hellman, 1999), the public broadcaster YLE is still ahead of its commercial rivals in Finland, offering a more diverse choice of program types. However, both channels of YLE, as well as MTV3, have marginally narrowed their supply since the entry of Nelonen. The last three years, in particular, show a modest, yet clear decline in the diversity of MTV3's programming. Nelonen, then, seemed to decrease its diversity during its first six years of operation instead of challenging the established broadcasters with a wide range of choice. In 2002, the both commercial channels respectively offered the narrowest program supply in the history of their existence. The clear downward trend in system diversity after 1997 suggests that, as expected, increasing competition due to the new entrant caused the narrowing of the diversity of Finnish television supply. The fact that, since 1997, the overall system diversity suffered more than the diversity scores of individual channels may be caused by Nelonen with its the great concentration on foreign fiction. While devoting a major share, 44 per cent in 2002, of its programming time to foreign

series and serials the channel tends to bias the overall program structure of the four-channel system, thus causing a decline in system diversity scores.

Figure 8. Diversity of all programming by system-wide and by channel, 1993-2002

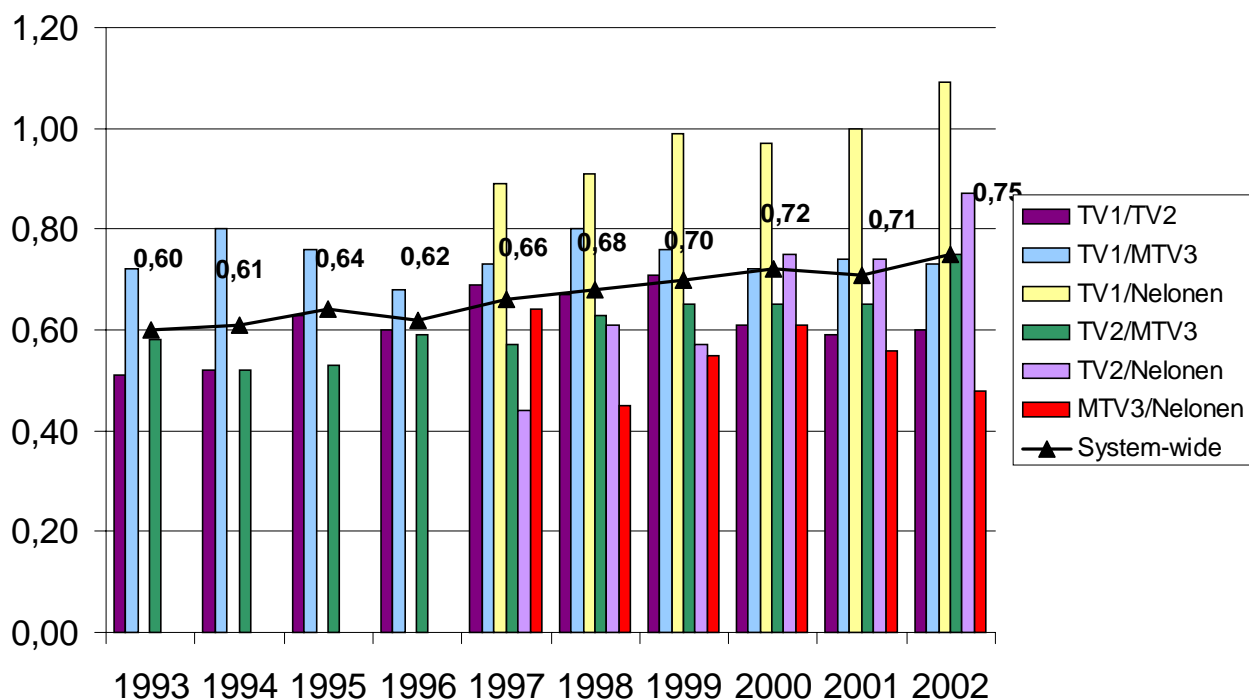


Source: MOTC 2003

Although the diversity analysis proves that the Finnish channels remain very diverse, already the channels profiles of 2002, as well as the shares of information and entertainment-oriented programming in 1993-2002, suggest a distinct, if subtle, division of labor in the Finnish television market. In order to trace specifically this development, differences between the channels are here measured by the “Dissimilarity Index”: It indicates how much the content of one network, in terms of program types represented in its schedule, differs from the content of another (channel dissimilarity). By calculating the average dissimilarity per year, the index serves as a measure of difference across channels (system dissimilarity). The higher the sum of differences, the higher the dissimilarity between the channels and, vice versa, the lower the dissimilarity index score, the more homogenous the output. The mathematical maximum of this index is 2 while the minimum is 0. (see, e.g., Hellman & Sauri 1994; Hellman 2001.)

The values of Dissimilarity Index, presented in **Figure 9**, indicate that, contrary to expectation that increased competition produces “more of the same”, the entry of Nelonen encouraged differentiation between the channels rather than decreased differences in the program structures of the four channels. The average dissimilarity across channels for 1993–1996 was .62, whereas for 1997–2002 the average score of the system dissimilarity index was .67.

Figure 9. Dissimilarity between channels in 1993-2002



The figure above depicts that although still close relatives to each other YLE's two channels differentiated their offerings during the research period and, in particular, after the entry of Nelonen. The main distinction between the networks lies in their programming domains, with TV1 focusing on news, current affairs programs, and education, and TV2 on sports, fiction, and entertainment. Earlier research shows that these domains have been gradually developing since the early 1990s (Hellman, 1999).

The relatively low dissimilarity between MTV3 and Nelonen indicates that, to some degree, the channels provide for similar fares. No clear tendency towards excessive sameness could be discerned, but during the recent years, the channels are slowly becoming more alike. Before that, dissimilarity between them varied from year to year, suggesting that the two commercial channels were 'testing' with the right recipe to meet the rivaling challenge of each other. Interestingly, also TV2 closely resembled both MTV3 and Nelonen, indicating its role as the "entertainment network" of YLE. Still, TV2 does not imitate its commercial competitors but positions itself in between TV1 and MTV3, as in average it differed equally much from those two channels.

In sum, the analysis of dissimilarity between YLE's networks and the commercial channels shows a growing trend rather than a declining one, suggesting that no convergence between the public and private sector occurred. The highest dissimilarity values were found between TV1 and Nelonen that seem to represent two distinctly different ends of a channel profile.

Trends of Supply

Based on the features of Finnish television output in 2002 and in the comparison of the years 1993-2001, some general remarks can be made regarding recent trends of the Finnish television supply:

Differentiation rather than entertainment-orientation

In Finland, as elsewhere in Europe, the the dumbing down debates as well as related research have been ongoing for quite some time (see Sparks & Tulloch 2000). Studies with a similar outlook on television program output that has been presented above depict that only little has changed. In the end of 1980s, it was found that the Finnish television prime time had indeed been “streamlined” (Hellman & Sauri 1988). On another note, in the Finnish context it has been proven that no major changes occurred before the channel reform in 1993 (Hellman & Sauri 1994). In his study on Finnish television programming in 1988-96 Hellman (1999) found out that programming structure remained relatively unchanged, and that informational programming did not lose its program share to entertainment-oriented programs.

Similarly, the quantitative data on program types, depicted in this article, confirms that all the channels have engaged in differentiation and division of labour rather than in “lightening” their program output. The commercial channels could be found in the more entertainment-focused end of the scale, while the public service channels concentrated more on factual programming. The division of labour between the public service channels is since 2001 explicitly expressed in YLE’s internal strategy: both channels should remain generalist, universal and full-service channels, with TV1, however, serving high quality demands and international orientation, and focusing on news and current affairs, documentary, culture, heavy drama, and education, whereas TV2 should provide a more popular approach with its domestic and regional angle, comedy-oriented fiction, life-style programs, and entertainment and sports programs, as well as children’s programmes (Hujanen, 2002). The studies depicted here confirm that these commissions are followed dutifully.

If one looks at the development since 1993, when MTV3 became a separate channel (Hellman 1999), it seems that TV2 and MTV3 were from 1993 until 1997 very similar. The start of the second commercial channel Nelonen in 1997 prompted TV2 to shift towards more informative programming, and MTV3 to become more entertainment-oriented. After a brief period of a more factual-oriented programming, it seems now that MTV3 continues to compete with a relatively similar profile than that of Nelonen. It could be argued that while the average dissimilarity of the four analogue channels is steadily increasing, and while the public serve channels are engaging in a division of labour, MTV3 and Nelonen are becoming more alike, and thus the competition between the commercial channels is slowly becoming more intense.

It could be concluded that in the “moderate” competitive environment (van der Wurff & van Cuilenburgh 2002) of the dual system of Finland, all the nation-wide channels are generalist; yet they also differ moderately from one another. The crude comparison to the Swedish television supply indicates that the two Finnish PSB channels still coexist with their two commercial counterparts in an atmosphere of companionship rather than of fierce competition. As the Swedish television landscape is characterised with many domestic and specialised satellite channels, it seems that the Swedish channels must compete by specializing during the prime time hours, while Finnish channels remain more similar in their output (MOTC 2002 & 2003).

Polarization amongst genres

The situation portrayed above is related to a trend that could be called the polarization of program types. It seems, namely, that on one hand the so called “hard” informative programs such as news and current affairs, and, on the other hand, fiction and entertainment programs, are increasing their share in program supply. The proportion of traditional “softer” informative genres, especially factual and cultural programming, is decreasing. Also, the so called service and hobby programs, which emerged in early 1990s and increased their share until mid 1990s (see Hellman 1999), have now lost some of their appeal and reached a saturation point of their share in Finnish programming. The growth of current affairs programs in the Finnish television supply is indisputable.

Furthermore, there is a tendency, detected also in Sweden, regarding the so called “news-orientation” (nyhetisering), that is, the significant increase of newscasts of various kinds (see Granskingsnämnden 2000, Lähtenmäki 2000). In Finland, new newscasts and special news programs (regional news, business news, cultural news) have emerged on various channels. All channels have also increased their supply of newscasts, measured in programming hours, from 1997 to 2001, each by approximately 15 minute per day. If measured by program titles, news programs formed in fact the largest category in Finnish television supply in 2002. On the other hand, due to the longer duration of foreign fictional programs, the latter still was the program type with the greatest proportion of all program time.

Relative Americanisation

A claim that often accompanies the discussion on entertainment orientation is that TV supply is increasingly being dominated by North American programs. In the case of Finland, this assumption is only partly accurate. Admittedly, it is clear that American fiction plays an important role in the Finnish television culture already, or at least, in quantitative terms. In 2002, North American programs comprised one fourth of the Finnish television supply. Their share has increased a little in ten years, as in 1993 American programmes were allocated one fifth of total programming time. From another angle: over 80 percent of all North American programming seen on Finnish screens in 2002 was either drama or movies. The difference between commercial and PSB channels was clear. Almost 40 percent of MTV3’s programs and close to 50 percent of Nelonen’s all programs were imports from North America. YLE’s TV1 and TV2 broadcasted a much more balanced array of drama and movies from Nordic and European countries as well as from elsewhere in the world, although Nelonen had increased the share of European production in the past years, mainly in the form of British drama series.

The Finnish case corresponds to some other European studies (e.g., DeBens & de Smaele 2001): fiction plays an important role in European television program supply; most fiction is of American origin; and the distribution of European fiction across the borders is highly dependent on the language and cultural proximity. The differences between commercial and public service broadcasting in this respect seem quite similar in many countries in Europe. The Finnish case resembles situation elsewhere in Europe also in another respect. Although American fiction may have a dominant position, domestic fiction is still very important to viewers. It is one of the genres which still can, at least occasionally, reach mass audiences in the present situation of increasingly polarised viewing patterns and fragmented audience segments (e.g., Schulz 2000). In 2002, the ten most watched programs were all domestic productions (although they included a Finnish entertainment show modified from a British format, and a Finnish soap opera modelled after originally Australian format the Neighbours). All in all, 2002 resembled the Top Ten list of previous decades (see, e.g., Jääsaari 1996) as it was dominated by very “Finnish” programs – by certain newscasts, sports events, and by some “ritualistic” program traditions such as the President’s televised Independence Day Reception.

Various forms of infotainment

Although the increase of entertainment orientation in television is not an overall tendency, the public discussion surrounding it may relate to a trend of infotainment that characterises the 1990s in the Finnish television. Unlike often claimed, infotainment – the mixture of information and entertainment – seems not to be changing the role of those programmes which fit the traditional categories of news and current affairs, at least in quantitative terms. As already stated, the proportion of news and current affairs programmes has been growing in Finland, and the genres have not been replaced by other programme types either in prime time or overall programming. Qualitative research could shed light on if, how and to what extent the contents and style of these traditionally journalistic programmes are becoming more infotainment-oriented, but some European studies indicate that changes are not as significant as often suggested (see, e.g., Brant 1998). However, as mentioned above, Hellman's research (1999) as well as our study support other observations on the emerge of hybrid infotainment subgenres which borrow from various traditional programme types. For the past decade, reality-based entertainment, service and hobby-oriented factual programming and all kinds of human interest programmes have been and still are entering and exiting television markets, while "hard" factual programmes remain their strong position in overall television supply.

In a Swedish research which resembles the study depicted in this article, one of the recent key findings was the rise of the so called reality television (Granskningsnämnden 2000). In our study, reality-based, entertainment-oriented programmes were not classified under their own category, but the trend became evident already in the coding of the data. There were some programmes which defied the traditional programme categories, and thus did not correspond, e.g., to the trend of hobby and personal interest programmes which had emerged in Hellman's (1999) study of the years 1988-96. Sweden and many other European countries are ahead of Finland in this development, but the year 2001 witnessed the transformation of reality TV genres from cable to nation-wide channels, from American imports to Finnish versions. It also seems that audience segmentation has shifted from the trendy youth to include also in some cases the whole family.

The trend is not unexpected, given the success (and the predicted rapid failure) of reality TV genres all over the world. Also, the recent past of "reality based" programmes can be seen in traditions of talk shows and in the so called docudrama and reconstruction programmes. These programme types emerged as imports and domestic productions in a larger scale in the early 1990s in Finland. (Aslama 2002; see also Wieten 1998.) A closer look at the data depicted in this article reveals, then, that the factual programmes seen in the commercial channels mostly are programs that mix information and entertainment, and could be classified as a "talk show", "docu drama" or a "reality show". Also, more reality TV-style entertainment such as Survivor-inspired domestic competitions, dating games and global formats like Who Wants to Be a Millionaire, Popstars, and the Weakest Link can be seen on the Finnish small screens.

Public service, commercial competition, dumbing down and diversity in the digital era

In addition to trends pertaining to program types, today's Finnish analogue TV output resembles situations in other countries with dual systems. In comparative studies in various countries, public service broadcasting seems to be able to offer more diverse programming than commercial channels (e.g., Hellman 1999, Ishikawa et al. 1996, Granskningsnämnden 2000). At least in many countries in Western Europe this is a predictable outcome, due to the legislative mandate of public service television.

The overall Finnish program supply has maintained a very high diversity index throughout some major changes in the market – or, in other words, it has maintained a status quo for almost a decade, despite of the significant increase in programming hours. The channel reform of 1993, granting the operating licence for MTV3, did not increase the overall diversity of Finnish television supply. It did increase the variety in MTV3's output, triggered the moderate growth in entertainment-orientation in the PSB channel TV2, and sharpened the division of labour between TV1 and TV2. (also, Hellman 1999). Although the birth of the second commercial channel Nelonen seemed to have caused MTV3 to reconsider its position in relation to the newcomer and to the PSB channels, the division of labour was quickly found. It also seems that the dual system of two public service channels and two commercial channels had by 2001 reached a “consensus” on division of profiles of each channel, while still maintaining the so called full service and accordingly, diverse supply, in every channel. The year 2002 does show some signs of increasing competition between the two commercial broadcasters as they are becoming more alike and both narrowing their program supply. Still, the four nation-wide channels as a whole offer very diverse programming to the Finnish viewers.

It could be said, then, that with the quantitative, overall outlook, the Finnish “dumbing down” and “more of the same” debates cannot be supported with definitive and dramatic quantitative evidence regarding overall programme supply. True, the share of entertainment-oriented programming has grown slightly; all the channels, but especially the commercial ones, have narrowed their output somewhat; and thus the overall diversity has decreased. However, the decline in overall diversity is very small, and the overall supply still remains in the range of “very high diversity”. The slight decline here cannot be attributed generally to overall growth of entertainment orientation and decline of informational programming (although a slight tendency towards that direction could be detected). As the Relative Entropy Index measures the balance or “evenness” of distribution of all programme types, it is rather the increased share of one program type, foreign fiction, that especially Nelonen brought about. The question pertains more to division of tasks. Although each analogue channel still claims to be generalist and provide full-service, it is clear that the PSB emphasizes certain informational programme types, whereas the commercial channels provide more entertainment-oriented genres. Up until recently, they, too, seemed to specialize: MTV3 more in entertainment and Nelonen in foreign fiction. It seems, however, that this division of labour is transforming into competition. Still, as at 2002, the Finnish dual system is able to utilize diversification and give audiences a very diverse array of programming.

However, a more closer, qualitative analyses – corresponding to Sparks' (2000) other levels of tabloidization as manifested in shifts of contents of journalism, and shifts in tastes and genre modes – have detected some changes towards a more popular journalistic style, and tendencies in modal changes of programs such as talk shows and reality-TV type genres (e.g., Aslama 1999, Aslama 2002, Aslama & Jääsaari 1997). In the public debates, the channels' executives admit that the competition is based on popular programming, rather than on developing more innovative and engaging factual programs (e.g., debate on *A-talk* discussion program on TV1, 4.12.2002).

In the future, programs of any single channel become less and less important. For example, in addition to TV1 and TV2 which will eventually become digital after an adjustment period, YLE hosts three new digital channels: the 24-hour news channel YLE24; the culture-education-science channel YLE Teema and FST. In addition, the digital commercial competitors include Subtv with an entertainment-oriented programming targeted for young adults, as well as Urheilukanava that focuses solely on sport. These five new digital channels, then, with the exception of the Swedish-language FST channel, are highly specialized. In the MOTC study (2003), program profile and diversity analyses for the digital channels were conducted, with a surprising result. Although Subtv's programming includes, e.g., a large amount of reruns of old American sitcoms, and although Urheilukanava broadcasts only one genre, namely sport, the five digital “narrow” channels engage in a division of labour in such manner that their joint

program profile resembles that of the overall analogue television supply. The overall digital program diversity is very close to the overall diversity of the four full-service analogue channels.

The slow development towards a fully operating digital television is due to the viewers' hesitation to buy themselves with suitable devices. This has prompted a heated debate on the role of the public service, as commercial broadcasters are in financial difficulties, both due to the decrease in advertising revenues, as well as to the necessary build up of digital infrastructure. The commercial companies now urge that YLE's remit should be less diverse; that TV1 and TV2 should stay out of sports and entertainment programming. Finnish media policies have thus far have mainly regulated the structures of the market – and thus created the situation of moderate competition that is shown to support diversity of programming (van der Wurff & van Cuilenburg 2002). Now, in the brand new Communications Market Act of 2002, the commercial channels are given a financial break based on the need for digital progress. On the other hand, the law requires that YLE's operations will be monitored more closely. In addition, the parliament as well as the Ministry of Transport and Communications are in the process of reviewing YLE's public service mission. The results may involve some suggestions of tightening, as opposed to lightening, of Finnish public service television supply.

The question of “dumbing down” and “diversification” thus emerge once again, not only as a moralistic, value laden worry of low-quality journalism and trash programming, but in relation to the generalist traditions of television broadcasting. It could be argued that as the specialised channels are about to enter as novelties in the Finnish television landscape, diverse, full service analogue channels will still remain important for a few years to come. In addition, it may very well be that while new specialised digital channels find their respective audience segments, viewers will still appreciate strong generalist channels that offer them diverse full service television programming.

References:

- Aslama, Minna (2002)
Tosi-Tv:n todellinen maailma [the Real World of Reality Television]. Journalisminkritiikin vuosikirja 2002.
- Aslama, Minna (1999)
Private Talk in Public. A Case of Finland. In Sreberny, A. & van Zoonen, L. (eds.) *Gender, Politics and Communication*. New York: Hampton Press.
- Aslama Minna & Jääsaari Johanna (1997).
Avoimien vai suljettujen silmien politiikkaa? Kirsi, kiintiöt ja populaari julkisuus. [On politics and popular publicity] *Politiikka* 3/ 1997.
- Brants, Kees (1998)
Who's Afraid of Infotainment? *European Journal of Communication* 13:3, 315-335.
- Dahlgren, Peter (2000)
Key trends in European Television. 23-34. In Wieten, Jan, Murdock, Graham & Peter Dahlgren (eds.). *Television Across Europe. A comparative Introduction*. London, Thousand Oaks & New Delhi: Sage.
- DeBens, Els & de Smaele, Hedvig (2001)
The Inflow of American Television Fiction on European Broadcasting Channels Revisited. *European Journal of Communication* 16:1, 51-76.
- Government (1998) =
Hallituksen esitys Eduskunnalle televisio- ja radiotoimintaa koskevaksi lainsäädännöksi, 17.4.1998. [The Finnish Government's proposal for the legislation on television and radio operations]
- Granskningsnämnden (2000)
Svenskt TV-utbud 1999. [Swedish TV program supply 1999] Granskningsnämndens rapportserie 6. Stockholm: Granskningsnämnden för radio och TV.
- Hellman, Heikki (1999)
From Companions to Competitors: The Changing Broadcasting Markets and Television Programming in Finland. *Acta Universitatis Tamperensis* 652. Tampere: Tampereen yliopisto.
- Hellman, Heikki (2001)
Diversity – An End in Itself? Developing a Multi-Measure Methodology of Television Program Variety Studies. *European Journal of Communication* 16:2, 181-208.
- Hellman, Heikki & Sauri Tuomo (1988)
Suomalainen prime-time: Tutkimus television uudesta kilpailutilanteesta sekä Yleisradion ja MTV:n parhaan katseluajan ohjelmarakenteesta vuosina 1970-1986. [Finnish program structure 1970-86] *Nykykulttuurin tutkimusyksikkö, Julkaisuja n:o 10*. Jyväskylä: Jyväskylän yliopisto.
- Hellman, Heikki & Sauri, Tuomo (1994)
Public Service Television and the Tendency towards Convergence: Trends in Prime-Time Program Structure in Finland, 1980-1992. *Media, Culture & Society* 16:1, 47-71.
- Hellman, Heikki & Sauri, Tuomo (1996)
Konvergens och mångfald i de finska TV-kanalerna: TV-reformens påverkan på prime time-programutbudet 1988-1995. [Convergence and diversity in the Finnish television channels] In Hultén, Olof ym. (red.) *Nordisk forskning om public service: Radio och TV i allmänhetens tjänst*. Göteborg: Nordicom, 101-120.
- Hillve, Peter, Majanen, Peter & Rosengren, Karl Erik (1997)
Aspects of Quality in TV Programming: Structural Diversity Compared over Time and Space. *European Journal of Communication* 12:3, 291-318.
- Ishikawa, Sakae ym. (1996)
Diversity in Television Programming: Comparative Analysis of Five Countries. In Ishikawa, Sakae (ed.) *Quality Assessment of Television*. Luton: University of Luton Press, 253-263.

Jääsaari, Johanna (1996)

Television katsotuimmat ohjelmat suomalaisuuden kuvina. [The most watched programmes and Finnishness]. In Radio- ja tv-tutkimuksen vuosikirja 1996. Yleisradio Oy, Yleisötutkimus: Helsinki.

Lähteenmäki, Miira (2000)

Kruununjalokivi, merkkipaalu ja veturi. Uutiset ja kaaviovetoinen ohjelmointi kanavilla TV1, TV2, MTV3 ja Nelonen 1978-1998. [News and programming 1978-98] Pro gradu. Tampereen yliopisto.

McQuail, Denis (1992)

Media Performance. Sage: London, Newbury Park & New Delhi.

MOTC (2003)

= Aslama, Minna ym. Suomalainen tv-tarjonta 2002. Liikenne- ja viestintäministeriön julkaisuja 40/2003, Helsinki.

MOTC (2002)

= Aslama, Minna ym. Suomalainen tv-tarjonta 2001. Liikenne- ja viestintäministeriön julkaisuja 4/2002, Helsinki.

MOTC (2001)

= Aslama, Minna ym. Suomalainen tv-tarjonta 2000. Liikenne- ja viestintäministeriön julkaisuja 41/2001, Helsinki.

Sauri, Tuomo (2000)

Televisio. [Television Statistics] Teoksessa Joukkoviestimet 2000. Kulttuuri ja viestintä 2000:1. Helsinki: Tilastokeskus, 47-52.

Schulz, Winfried (2000)

Television Audiences. In Wieten, Jan ym. (eds.) Television Across Europe. London, Thousand Oaks and New Delhi: Sage, 113-134.

Sparks, Colin & John Tulloch (2000)

Tabloid Tales. Global debates over media standards. Lanham, Boulder, New York & Oxford: Rowman & Littlefield Publishers, Inc.

Wieten, Jan (1998)

Reality Television and Social Responsibility Theory. In Brants, Kees ym. (eds.) The Media in Question. Popular Cultures and Public Interests. London, Thousand Oaks and New Delhi: Sage, 101-112.

Wiio, Juhani (2001)

Televisio. In Wiio & Nordenstreng (eds.) Suomen mediamaisema. WSOY: Vantaa.

Van der Wurff, Richard & Jan van Cuilenburg (2001)

Impact of Moderate and Ruinous Competition on Diversity: The Dutch Television Market. The Journal of Media Economics 14(4), 213-229.

Yleisökertomus 2002

= Jääsaari, Johanna, Juha Kytömäki & Erja Ruohomaa. Yleisökertomus 2002 [Audience Research Report] YLE: Helsinki.

Österlund-Karinkanta, Marina (1993)

Current Media Policy Issues in Finland. YLE.

Annex:

Measures of diversity and dissimilarity (see Hellman 2001):

The Relative Entropy Index (H) expresses how varied and balanced the programme output is on a channel, i.e. vertically (*channel diversity*). When calculated as a summary measure of the overall programme output across channels, it serves as a horizontal measure (*system diversity*). The higher the figure, the higher the diversity to the viewer.

To calculate the index, one needs first to measure the absolute entropy H_{abs} of the programme output. This is done according to the following formula:

$$(1a) \quad H_{abs} = \sum -p_i \log_2 p_i$$

where p_i stands for the percentage devoted to each programme category. Relative entropy H is then obtained by dividing the value of H_{abs} with the maximum value possible ($H_{max} = \log_2 N$), where N is the number of programme categories used:

$$(1b) \quad H = \frac{H_{abs}}{H_{max} = \log_2 N}$$

Relative entropy H varies between 0 and 1, with 0 expressing minimum diversity (all content in one category) and 1 expressing maximum diversity (all categories equally large). Due to the logarithmic character of the measure, the closer we come to the maximum score, the more difficult it becomes to increase its value (Hellman, 2001).

Difference between the channels is measured by the Dissimilarity Index (D), which indicates how much the content of one network, in terms of programme types represented in its schedule, deviates from the content of another (*channel dissimilarity*). By calculating the average dissimilarity per year, the index serves as a horizontal measure of difference across channels (*system dissimilarity*). Mathematically dissimilarity is derived by subtracting the percentage of time p per programme category i by one broadcaster A (p_{iA}) from the corresponding figure by another (p_{iB}) and summing up the differences:

$$(2) \quad D = \sum |p_{iA} - p_{iB}|$$

The higher the sum of differences, the higher the dissimilarity between the channels and, vice versa, the lower the dissimilarity index score, the more homogenous the output. The mathematical maximum of this index is 2 while the minimum is 0. In calculating the index, it plays no role whether the result of subtraction is positive or negative; only the extent of deviation matters.