

Published in: *Radio Journal: International Studies in Broadcast & Audio Media*
15(1), 27–45.
DOI: 10.1386/rjao.15.1.27_1

Public service hit radio?

Playlists and product differentiation in the competition for listeners

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Abstract

Since the 1960s, public service broadcasters have attempted to meet the demand for music by young listeners. As commercial radio offerings have expanded, and as public broadcasters are monitored more closely than before, the question arises as to what degree and in which ways public service radio should differ from commercially formatted stations. This article analyses the differentiation strategies applied in music programming by major radio stations in targeting youth and young adults in Finland. Employing a multi-measure approach in the analysis of the content, the results confirm that YleX, a popular music station of the public broadcaster YLE, differs significantly from its major commercial rivals Energy and The Voice. The article argues that even a radio station focusing on the latest hits can fulfil a public service mission.

Keywords

Commercial radio

playlists

public service

radio competition

radio music

Yleisradio

Introduction

Both the normative theory of the media (e.g. Christians et al. 2009; McQuail 1992) and the European regulatory governance of broadcast media (e.g. European Commission 2009) state that public service media (PSM) are not only expected but required to promote social, cultural and educational goals, i.e. 'to serve public interest, nurture the public sphere, enable democratic society and feed the culture with merit goods' (Tracey 2014: 89). That said, there is a commonly shared agreement that public service broadcasters (PSBs) should highlight, among other things, quality, comprehensiveness and pluralism, thus providing distinctive content that markedly differs from the commercial provision.

This article focuses on the radio market in Finland, where there are both dozens of commercial stations and a strong state-owned PSB, Yleisradio (YLE). When the parliament, in 2012, amended the Act regulating YLE, it concluded that 'programming sponsored by public resources should not encourage overlaps and intensify competition between the commercial and public service broadcasters'. However, although the commercial channels on both radio and television have targeted much of their offerings to young audiences, YLE should also, according to the parliament's Committee of Transport and Communications, aim to serve them better than before. Instead of imitating the commercial approach, the committee stated that public service should define distinction as its appropriate strategy, claiming that the programme offerings of YLE targeted at youth should 'differ in terms either of contents or manner of presentation from commercial offerings so that it proves valid in the present state of competition and can be justified from the needs of public service' (Parliament 2012: 4–5).

Although this normative presumption concerning distinctiveness is strong, the de facto regulation of YLE's programming remains general and vague (Hellman 1999; Karppinen et al. 2015). According to the Act on YLE, the company is 'responsible for the provision of versatile and comprehensive television and radio programming with the related additional and extra services for all citizens under equal conditions'. The public service programming shall, among other things, 'produce, create, develop and maintain Finnish culture, art and inspiring entertainment' and 'focus on programming for children and young people' (Parliament 1993: 7§). However, the Act does not define how the programming should differ from the programmes of commercial broadcasters, or what kind of music YLE radio stations are expected to play. At the same time, the content of commercial stations is regulated by operating licences in which the Finnish Communications Regulatory Authority (FICORA) can include stipulations that are regarded as necessary in order to secure the variety of offerings and the needs of special groups, e.g. requirements concerning the target group and musical output of the station (Parliament 2014: 27§, 37§; FICORA 2016).

Although public service and commercial stations have different purposes and different financial bases (with YLE being funded by a special public broadcasting tax, which is collected from individuals and corporations), it is the music format that has become the most significant means of differentiation in radio (Ala-Fossi 2005; Kemppainen 2015; Uimonen 2010; Vilkkö 2010). In spite of the elementary status of music, the methodology of analysing radio music is not well established (cf. e.g. Ala-Fossi 2008;

Barnard 2000; Lejre and Kristensen 2014; Uimonen 2008). Most of the empirical studies on radio music have focused on either commercial stations (see e.g. Ahlkvist and Fisher 2000; Ala-Fossi 2006; Dimmick and McDonald 2001; Rothenbuhler and McCourt 1992; Tuominen 1993; Uimonen 2010) or public broadcasters only (see e.g. Hendy 2000; Wallis and Malm 1993). This means comparisons of the music offerings of public and commercial stations are rare (see e.g. Barnard 1989; Berry and Waldfogel 1999; Kemppainen 2010; Krämer 2009; Kurkela and Uimonen 2009; Negus 1993; Vilkkö 2010).

This article analyses how the distinctiveness required of a public service broadcaster materializes in radio broadcasting in Finland. Our approach draws from normative theory of the media, media policy studies and media policy practice. Similar to other Nordic and Western European countries, the mission of Finland's public broadcaster has been the subject of lively debate; for instance, it has been claimed that YLE distorts the market, and commercial media companies have argued for restricting YLE's provision to programming that is not feasible commercially. For example, some have said that YLE should not compete in certain areas of reality television, sports rights and youth music, since demand in these fields can be met commercially (see e.g. Hellman 2010; Karppinen et al. 2015; Nieminen 2009). However, the prevailing policy interpretation is that PSBs are allowed to provide services that overlap or complement commercial services insofar as they are in concordance with the documented public service provision (Donders and Pauwels 2012; Karppinen et al. 2015; Nord 2012).

We compare the music selection of three radio channels: YleX, a public service station, Radio Energy and The Voice, both well-established commercial stations. All three target teenagers and young people, and represent a similar format based on a restricted playlist. Do these similarly formatted stations fulfilling different purposes and drawing from separate funding sources differ from each other and, in particular, how do their music offerings stand out in terms of the competition for listeners? Does the playlist of the public service YleX imitate the commercial hit radio stations, or does it provide a selection of music of its own? In the terminology of media economics, the question is whether the stations are duplicates, or substitutes, of each other, or whether they are distinctive broadcasters that complement each other (Berry and Waldfogel 1999; Dimmick and McDonald 2001). Have their playlists diverged or converged during the 2000s as radio competition has become fiercer? Furthermore, we ask whether a playlist, a competitive tool typical of commercial radio, is at all compatible with public service provision.

First, we discuss the concept of format radio. Second, we elaborate on the development of competition in radio in Finland, and the ways YLE has, historically, tried to meet the demand for youth music. In the third section, we describe the data and methods of our empirical analysis; we analyse the playlists of the three radio stations in 2004 and 2014 using methods and measures mainly drawn from an earlier study by Vilkkö (2010). Finally, we discuss the similarities and differences observed in relation to the public service obligations. We hope to indicate that a popular hit radio station may fulfil public service purposes.

The age of format radio

The emergence of commercial competition in the European radio market during the 1980s and 1990s has been called a transition from 'the old order' to 'the new order' (Ala-Fossi 2005; McQuail 1992). As a result, commercial radio became the prevailing and dominant form in most Western European countries. In the most important market areas you can listen to dozens of commercial stations, most of which are owned by international chains. The expansion of commercial radio has changed the quality culture of the medium, i.e. the standards of radio programming, thus affecting the public-owned corporations too (e.g. Ahlqvist 2001; Ala-Fossi 2005; Barnard 1989; Berland 1990).

The new order emphasizes the importance of music to a greater extent than before. Separate programmes, characteristic of the ancient 'block radio' and typical of public broadcasters in particular, have been replaced by a continuous stream, or flow, of music, accompanied by presenters' talk. The radio industry calls this entirety of programming structure, content and form a format (e.g. Ahlqvist and Fisher 2000; Ala-Fossi 2005; Berland 1990; MacFarland 1997; Vilkkö 2010). The programme stream being pressed into a certain format, the nature of which varies according to the station and its target audience, is the most central single expression of commercial radio culture.

Typically, the format is based on the music offering of a narrow playlist, and is designed deliberately according to the age, gender and attraction of the target group at which the programming is aimed. Besides indicating the type of music played, the format is also the station's strategic tool in arranging and scheduling its programming and creating a listening community of its own. In addition, different kinds of sound effects and station IDs, as well as the presenters' talk, are expected to support channel promotion (Ahlqvist and Fisher 2000; Ala-Fossi 2005; Barnard 1989; Berland 1990; MacFarland 1997; Vilkkö 2010). Applying the concepts of media economics, a format represents the product differentiation through which companies try to differ qualitatively from each other and reach the audience they want (Albarran 2002; Porter 1980).

For instance, in the United States, the music formats are established and precisely defined to the point that the operating licences are granted according to the format. The most typical music format is Current Hit Radio, aka CHR, which is based on the controlled rotation, in other words repetition, of the most popular current hits. Another central success format is Adult Contemporary, aka AC, which typically plays soft rock or pop, both new and older hits, aimed at the 25 to 54 age group (Berland 1990; MacFarland 1997).

In Finland, the formats are less strict than in the United States. This is perhaps due to the strong position of public service radio, but also because small radio stations in small markets tend to copy each other's success recipes and slide towards a wider scope of music (Turner 1993). Even though we have tended to consider formats as an ideology of commercial activities, they have increasingly ruled all Finnish radio actions since the early 1990s (Ala-Fossi 2005; Kurkela and Uimonen 2009; Uimonen 2010; Vilkkö 2010). Similar to the United States, radio licences in Finland too are categorized by the target group and the format. For example, the licences of both Radio Energy and The Voice

stipulate that their music content is to be 'composed of popular music targeted at the youth and young adults' (FICORA 2016).

YLE and the competition for young listeners

Traditionally, music output was part of the public broadcaster's educational mission, which meant there was a lot of classical music on the air; the popular music being aired was supposed to be 'suitable entertainment' (Gronow 1968). During the past few decades, public service radio stations have been forced to adjust, especially to the increasing demand for popular music and to the offerings of commercial stations. According to Olof Hultén and Kees Brants (1992: 118), public broadcasters have applied three different strategies in meeting the commercial competition:

1. *Adaptation*. In this model, a PSB returns the challenge of commercial media by using similar methods, thus copying them increasingly.
2. *Purification*. In this option, a PSB focuses on the very core of public service programming, which is not in the interest of commercial stations, thus withdrawing from competition.
3. *Compensation*. In this option, a PSB builds on its strengths, such as minority appeal offerings and diversity, thus avoiding both marginalization and commercialization, but, at the same time, succeeding in terms of competition with the commercial media.

In media policy discourses, the commercial adaptation has been condemned as unsuitable for PSBs. Purification, or the 'monastery model', is usually promoted by the representatives of commercial media who want to limit the territory of potential public service competitors. The compensation model, then, has been defended by PSBs themselves (Jakubowicz 2003; Nord 2012). The normative research literature has usually concluded that a radical narrowing of public service provision would lead to the marginalization of PSM (Hellman 2010; Hujanen and Lowe 2003; Jakubowicz 2003). Recently, however, many studies have highlighted the need to strengthen the public service broadcaster by clarifying its profile, which can be interpreted as a concession towards the monastery model (e.g. Donders and Pauwels 2012; Martin and Lowe 2014; Nord 2012; Picard 2012).

During its 90 years of history, YLE has gradually increased its output of popular music. In the 1930s, the company increased the playing of gramophone records. In the 1960s, it replied to the hit programming of the pirate stations by increasing the supply of light music and establishing programming slots named *Sävelradio* (Melody Radio). In the 1980s, YLE gratified the growing demand by starting *Rockradio*, a set of daily programmes that increased the music offerings for youth (Kempainen 2010; Kurkela and Uimonen 2009; Vilkkö 2010).

The opening of broadcasting to competition in 1985 was the crucial push. The new local commercial stations, e.g. Radio City and Radio Ykkönen in Helsinki and Radio 957 in Tampere, started to create a new quality culture in radio and change the methods of selecting music. To strengthen its audience relations, in 1990 YLE came up with a model

of three strictly profiled channels: Ylen Ykkönen represented the traditional high culture radio, Radio Suomi became a popular music-oriented topical affairs and news channel and the third station, Radiomafia, was tasked with bringing back the lost young generation (Ala-Fossi 2005; Kemppainen 1998, 2010.) With its playlists, Radiomafia also brought the pre-models of format radio to YLE, with a small jury of five or six people putting together the playlist for the station, and the final decisions being made by the head of music (Vilkko 2010).

Originally, not even the output of commercial stations was restricted to playlists. On one hand, both individuality and locality ruled; on the other hand, the so-called *Suomi-rock*, a national popular music style that became mainstream, blurred the boundaries between rock and pop, which meant that the same songs could be aired by very different stations (Tuominen 1993). However, in the 1990s, local stations started to form chains or were taken over by bigger stations, resulting in a corporate-based, strictly formatted commercial radio quality culture with playlists and rotation clocks (Ala-Fossi 2005; Kurkela and Uimonen 2009; Uimonen 2010). Kiss FM and Radio Energy, in particular, gave wings to the progress of formatted music radio when they, in 1995, obtained licences for their semi-national programming and expanded quickly into major urban areas. The playlist procedure was also strongly promoted by the international Scandinavian Broadcasting System (SBS), which by 1996 had acquired major stations in major cities, as well as Radio Nova, the first truly national commercial station (Ala-Fossi 2005; Kurkela and Uimonen 2009; Uimonen 2010; Vilkko 2010).

Since 2000, concentration and internationalization of the radio business into the hands of big players (Sanoma Media, NRJ Group, Bonnier/MTV, SBS Discovery and, more recently, Bauer Media) has continued, and commercial stations such as Energy and The Voice have expanded their reach to become national. In 2003, YLE replied to the standardization of radio music by implementing a further reform of channels in which Yle Radio 1 and Yle Radio Suomi remained almost unchanged, but which saw Radiomafia replaced by YleX, a new station that aimed to serve as a hit-oriented youth channel (Kurkela and Uimonen 2009; Vilkko 2010). Consequently, competition within the industry has intensified, coinciding with a slight downturn in radio listening (Finnpanel 2015).

However, considering the countless new ways of consuming music – YouTube, Spotify, iTunes, online stations and the personalized playlists they offer – traditional radio has suffered surprisingly little. This indicates not only the adaptability but also the versatility of radio (Hagen 2015). All prominent radio stations have launched their services on the Internet, offering online not only their output as a live stream but also their interrelated playlists, facilitated by Spotify.¹ They have created a media strategy that takes advantage of new digital platforms and social media, which means that traditional broadcast radio has remained as only one, but still a central, medium that they utilize to reach their audience (Bonini et al. 2014; Stiernstedt 2013.) The ability to adapt is also evident in the fact that, in Finland, radio has succeeded in increasing its share of media

¹ For example, YleX provides several playlists on its website, including Top 20 of the Week, Top 100 of the Year, New Releases, Most Rated Hits, etc. The overall playlist includes more than 1000 songs, but registered listeners are invited to rate only a small portion of them (YleX 2016).

advertising and has become even more attractive to international radio chains than before (Ohlsson 2015). Thus, radio has not lost its status; it is reachable through different devices and is even more strongly than before present in the soundscape of different public domains (Uimonen 2015).

At the same time as YLE has succeeded in preserving its share of radio listening at around 50 per cent (Finnpanel 2015), YleX in particular has occasionally been blamed for imitating the commercial stations. For example, Kurkela and Uimonen have claimed that the company has been more interested 'in increasing the number of their listeners, just like the commercial sector', and in using 'the same methods as its commercial competitors', thus being 'passive and more responsive to influences from outside than proactively creating a music policy of its own' (2009: 152). On the other hand, Vilkkö (2010) demonstrated that, in 2004, YleX differed not only from the AC-formatted Radio Nova, but also from the CHR-formatted Kiss FM and Radio Energy by providing more songs and artists than the competitors, offering more of the latest, still unfamiliar music and more national artists than its rivals.

This suggests that it is not enough to recognize the format when one needs to understand the very characteristics of a radio station. In spite of similarly formatted playlists, a public service station may deliver a distinctly different musical selection if compared to commercial stations. This is supported by earlier studies by David Hendy (2000) and Keith Negus (1993), who analysed BBC Radio 1 in Britain. Contrary to commercial stations, BBC Radio 1 played the latest music extensively, not only established hits; its playlist was more varied, while the station also provided special music programmes and concert broadcasts, thus contributing to the success of the Britpop movement. Similarly, Benjamin Krämer (2009), in comparing four classical music stations in Germany, France and the United States, indicated that while all stations drew heavily from the 'canon' of classical composers, it was the public service Bayern 4 Klassik that was able to avoid the most familiar works and also provide lesser-known tunes. We presume that the specific musical profile of the PSBs reflects their own quality culture, resulting at least partly from their specific regulatory status.

Data and methods

The purpose of this study is to determine how the playlists of public service and commercial radio stations differ from each other, and whether they have converged during the past decade. We have chosen to analyse three similar radio stations that are all formatted to reach adolescents and young adults. Besides, these stations are the only ones concentrating on current hit music. Earlier studies by Uimonen (2010) and Vilkkö (2010) indicate that the public service YleX and the commercial stations Radio Energy and Kiss FM all play many current hits, typical of the CHR format.² During the past decade, the listening figures of each station have declined. The ratings of Energy have dropped least,

² To be precise, the radio programming licence of Radio Energy names its format European Hit Radio, or EHR (FICORA 2016).

which means today the stations are almost equal in their weekly reach. The figures collected by the National Radio Research (Kansallinen radiotutkimus, KRT) indicate that the biggest audience group of YleX consists of male listeners between 15 and 34 years old, while the most significant listenership of the commercial stations is females between the ages of 15 and 24 (Statistics Finland 2015). In 2004, the analysed stations represented 16 per cent of total radio listening while, in 2014, no more than 10 per cent, suggesting a decline in the market position of hit radio stations.

Table 1: Comparison of YleX, Radio Energy and Kiss FM/The Voice.

Feature	YleX		Radio Energy		Kiss FM /The Voice	
	2004	2014	2004	2014	2004	2014
Daily reach (% of the population)	10	6	8	7	9	4
Listeners per week (in thousands)	1003	743	738	664	960	539
Daily reach in the age group 9–14 (%)	12	7	22	16	16	8
Daily reach in the age group 15–24 (%)	24	13	18	20	14	7
Daily reach in the age group 25–34 (%)	16	14	10	10	12	6
Share of overall listening (%)	7	5	4	3	5	2

Source: Statistics Finland 2016.

The ownership of the stations shows distinct differences: while YleX is part of the state-owned Yleisradio Oy, Radio Energy, run by NRJ Finland, belongs to the French-owned NRJ Group, which is the largest European radio network with stations in 22 countries. On the other hand, The Voice is part of the German-based Bauer Media Group, which in addition to dozens of radio stations also owns magazines and Internet periodicals all over the world. At the time of the research however, The Voice was still part of SBS Discovery Media, owned by the American company Discovery Communications. The Nordic radio stations of SBS, as well as Radio Nova, earlier owned by Bonnier/MTV Finland, became part of Bauer Media in autumn 2015. As a result of these transactions, The Voice was renamed Kiss (Ohlsson 2015; Bauer Media 2015, 2016).

Our analysis is based on two cross-sections, with the first dating back to November 2004 and originating from research by Vilkkö (2010). The peak daytime programmes from 6 a.m. to 6 p.m. of YleX, Kiss FM and Radio Energy from week 47 were recorded from Monday to Saturday. The music played by the stations was identified and classified by listening to these tape recordings. Each piece of music was coded by title, artist, date of release, language, gender, genre and origin (domestic/foreign). The coding was carried out using the Selector music scheduling software. On top of scheduling the music, it also provides extensive analysing functions (including artist and song repetition,

percentages of category, genre, mood, etc.) which are integral to the idea of a playlist (see Vilkkö 2010: 79–90).

The second data set was gathered from the same week in November 2014 by substituting The Voice for Kiss FM.³ This time, the actual song-by-song analysis was conducted using the music reports the stations delivered to Gramex, the copyright organization for the performing artists in Finland. The daily music schedules published by the stations on their websites also facilitated the recognition of the songs played. Besides, the metadata of music videos published by YouTube were utilized in identifying the release date of the songs on the playlists. The title, artist, date of release and geographical origin of each piece of music were coded using the abovementioned sources and an Excel spreadsheet. This article focuses on these four variables only, with the unit of analysis being a single performance, i.e. a song performed by any artist.

The year 2004 provides a favourable basis for comparison since, by then, both the public service YleX and its commercial competitors had established their programme schedules as nationwide hit radio stations. The year 2014, then, represents a new competitive environment in which Spotify, YouTube, etc. have become mainstream services that fragment the listenership and may change programming patterns of the established radio stations. Although the research method changed from 2004 to 2014, the reliability of results was not at risk, insofar as the radio stations report trustworthily to Gramex the music they played. What is clear is that the method applied in 2014 was less laborious than the method applied in 2004. The sample of one working week is long enough to recognize the basic characteristics of the music played by the stations, since the playlist repeats itself structurally from day to day (Ala-Fossi 2006; Krämer 2009; Vilkkö 2010). Focusing on the peak daytime hours is justified by the fact that the playlist is most rigorously applied between 6 a.m. and 6 p.m.

Even though genre is one of the main measures of musical diversity (see e.g. Ala-Fossi 2006; Uimonen 2008), it is not utilized here as a variable, since we find it too broad and insensitive to distinguish between the stations. As Uimonen points out, the stations themselves 'dilute genre boundaries and shape them to make them fit their operative culture' (2011: 209). Comparisons using a song-by-song method give a straightforward and unambiguous basis for the scrutiny. Similarly, applying a multi-measure approach in the analysis of differences between the stations provides a versatile picture of the characteristics of the playlists (Hellman 2001).

Based on earlier research, we assume that even though all stations in this study represent the CHR format, the public service station YleX should differ from its commercial competitors due to its specific function and regulatory status. Our hypothesis is that YleX should be distinct from Radio Energy and The Voice in the following ways:

³ In order to understand better the playlist strategy of the stations, the data for 2014 covered only five days, from Monday to Friday, when the playlists are most stable. On weekends, the stations may provide special programming and more variety. In order to make the data comparable, the figures for 2004 are estimates and differ from the original data published by Vilkkö (2010). The amount of music played by each channel in 2004 is calculated by multiplying the original number of performances by five-sixths. Therefore, the breadth of the playlists and the number of artists are estimated by subtracting one-sixth of the number of performances/artists that were played only once.

- H1:** The playlist of YleX is wider and more diverse than the playlists of the competitors.
- H2:** The share of domestic music is higher on YleX than on commercial stations.
- H3:** YleX offers more of the latest new releases than the competitors.
- H4:** The difference between the public service station and the commercial stations has increased during the research period.

Since the mission of YLE, according to law, is to produce diverse and comprehensive programming, we expect that the popular music station of the public broadcaster provides a more varied selection of music and, thus, repeats itself less than the competitors. In earlier studies (Ahlkvist and Fisher 2000; Hendy 2000; Vilkkö 2010), the diversity of music has been studied explicitly by analysing the scope and repetition of the playlists. We are using three different measures derived from the study by Vilkkö (2010): (1) the number of different songs (recordings) on the playlist, (2) the number of different artists on the playlist and (3) the number of songs played only once during the week.

As public service broadcasting is obliged by the law to develop and preserve domestic culture, YLE faces higher demands than the commercial stations, and we expect it to provide a broader selection of domestic music than its competitors. We measure the degree of domestic content on the playlists using two instruments utilized earlier by Vilkkö (2010): (1) the proportion of domestic songs in the total output and (2) the absolute number of domestic artists.

The law obliges YLE to produce and create new culture and art, which can be interpreted to suggest that new music and new musical phenomena should be promoted. In addition, Barnard (1989) and Hendy (2000) have emphasized the importance of highlighting the latest music as a public service duty. Adding new recordings to the playlist has also been regarded as a measure of diversity in the analysis of commercial radio stations (Ahlkvist and Fisher 2000), even though intensified competition, according to earlier research, tends to direct radio stations towards using established, safe, hit music only (Rothenbuhler and McCourt 1992; Uimonen 2010). In other words, we expect that a public broadcaster takes risks by highlighting the latest music. We analyse the amount of latest releases played using two measures also drawn from the study by Vilkkö (2010): (1) the proportion of songs in category A and (2) the proportion of songs in category B. Songs in category A are hit songs released during the past sixteen weeks and played at least three times a day during the prime-time offerings of a station. The songs in category B are climbing new releases, no more than ten weeks old and played less than three times a day by a station.

Earlier studies on the effect of competition on programme diversity are ambiguous. However, it seems safe to presume that a fierce competition, with too many companies rivalling in a market, leads to declining diversity and excessive sameness in offerings (Aslama et al. 2004; Dimmick and McDonald 2001; van der Wurff and van Cuilenburg 2001). Since competition in the Finnish radio sector has intensified dramatically since the early 2000s, we expect that this has had a negative influence on the playlist variety of the commercial players in particular. Therefore, as YLE is regulatorily protected from a head-to-head contest, we expect that its playlists have increasingly diverged from

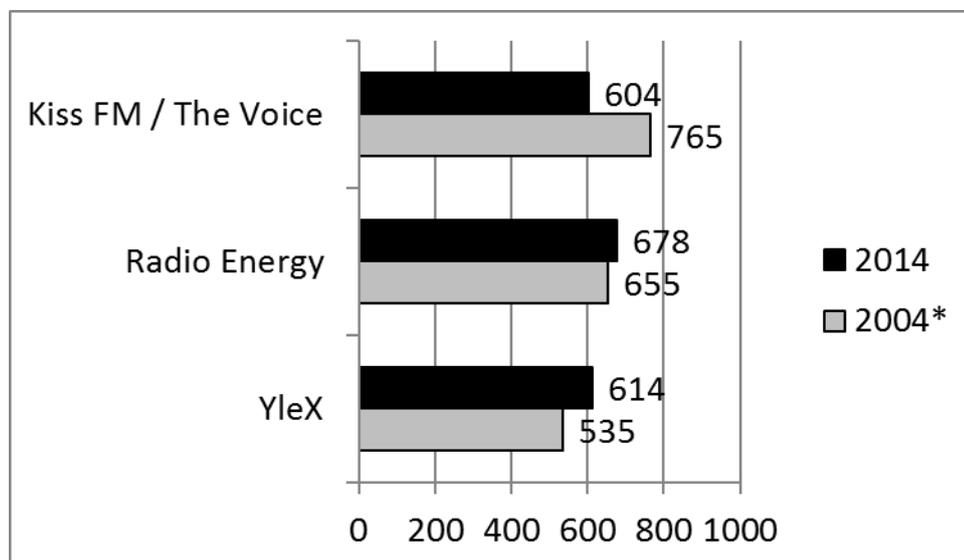
those of the commercial stations. We scrutinize the differences between YleX and the two commercial stations by comparing their results in 2004 and 2014 on all seven dimensions of diversity we measure.

Playlists in comparison

The amount of music played

The radio stations examined played 120 to 135 songs per day, including repeated plays of the same songs. Even though there were no commercials on YleX, it played fewer songs than its commercial rivals in 2004. From 2004 to 2014, YleX in particular, but also Energy, increased its output of music. In contrast, The Voice played in 2014 as much as one-fifth less music than its predecessor Kiss FM in 2004. Evidently, in November 2014, the most pieces of music were played by Energy. At the same time, the differences between the stations in terms of the amount of music played converged, suggesting that they constructed their versions of format radio in a more uniform manner in 2014 than in 2004. (Figure 1)

Figure 1: Number of songs played on ordinary weekdays in 2004 and 2014.



Note: Includes the repeated playing of the same songs.

* Figures for 2004 are estimates, calculated as five-sixths of the number of songs played on weekdays.

When music content diminishes in the output, it is replaced with either talk, station IDs or commercials. As our study concentrates on playlists, we have not been able to analyse how the relationships between the different elements have changed, but it is possible that by decreasing the number of musical performances Kiss FM/The Voice has increased the role of presenters in the programme flow, thus aiming at addressing its

female audience more effectively (Stiernstedt 2014). Similarly, one could think that the male-oriented listenership has made it possible for YleX to increase the volume of music in its output.

The amount of repetition

A playlist repeats itself, just as the theory of format radio assumes, but the playlists of different radio stations may differ from each other in a very distinct way. This means that even though it is often said that format radio stations play ‘the same songs repeatedly’, they are not necessarily similar to each other.

The measures describing the diversity and repetition of the playlists show a fairly coherent result, which not only reveals the change in playlists but also the stability of playlist structures (Table 2). The difference between the public service and commercial stations is clear, since there are far more different songs on the YleX playlist than on the playlists of its competitors. The commercial stations have decreased the number of different songs they play from 2004 to 2014, which translates into an absolute narrowing of their playlists. In the case of YleX, the development is opposite, as it has expanded its list slightly from 234 titles to 258 titles. In terms of the number of artists, the differentiation is

Table 2: Variety, domestic content and novelty of music on the playlists in 2004 and 2014.

Measures of playlist diversity	YleX		Radio Energy		Kiss FM / The Voice	
	2004	2014	2004	2014	2004	2014
<i>Measures of variety</i>						
Number of performances (different songs)	234 ¹	258	180 ¹	148	149 ¹	134
Number of performers (artists)	137 ¹	211	123 ¹	115	132 ¹	95
Number of performances played only once	155 ²	166	64 ²	57	20 ²	51
<i>Measures of domestic content</i>						
Share of domestic performances (incl. repeats) (%)	35	29	29	10	35	35
Number of domestic performers (artists)	34 ³	43	24 ³	9	22 ³	25
<i>Measures of novelty</i>						
Share of category A performances (incl. repeats) (%)	25	8	48	24	23	40
Share of category B performances (incl. repeats) (%)	27	47	6	17	4	5

[1] Estimate, calculated as five-sixths of the number of songs/artists played on weekdays.

[2] Estimate, calculated as the number of songs played on weekdays from which one-sixth of the songs played only once during the week is subtracted.

[3] Estimate, calculated as the number of domestic artists played on weekdays from which one-sixth of the artists played only once during the week is subtracted.

even more evident. While YleX has widened the scope of its artist roster from 137 to 211, the competitors have decreased the number of artists on their playlists, The Voice even dramatically. Furthermore, the number of songs played only once during the week shows a clear and widening difference between YLE and the commercial players. In 2014, the number of these 'solitary' songs at YleX (166) was approximately three times more than at The Voice (51) and Energy (57).

All our measures indicate that YleX has diversified its music output during the research period while the commercial stations have narrowed their output and concentrated on fewer hits and hit artists. The narrowing of the playlists and the diminished number of artists at the commercial stations suggest that the market has become more competitive, thus decreasing the diversity of their offerings (Dimmick and McDonald 2001), whereas YleX has reacted to intensifying rivalry by leaning on differentiation.

Domestic content

In terms of domestic content, the stations differ from each other less, and this, in part contradicts our expectations. As a whole, the share of domestic music in the peak-hours programming of the three stations diminished from one-third to one-fourth during the decade. Contrary to expectation, the station repeating domestic music most frequently in 2014 was The Voice, which was the only station that maintained its domestic content (35 per cent), while YleX and Radio Energy decreased their share of domestic music. The most dramatic drop was that of Energy, whose share of domestic music reduced significantly from 29 per cent to 10 per cent. On the other hand, the station offering the widest variety of domestic artists in each year of the study was YleX, which increased the number from 34 to 43. In addition, The Voice slightly broadened the variety of domestic artists on its playlist (from 22 to 25), whereas Energy leaned on as few as nine artists, a dramatic drop from 24 in 2004 (Table 2).

This study shows the usefulness of the multi-measure approach; even though the degree of domestic origin for The Voice in 2014 was higher than that of YleX, the commercial station put it into effect with a clearly narrower artist repertoire than the public service station. The more domestic artists the station has on the playlist, the more diverse the output of Finnish music. However, the PSB obligation to promote domestic culture raises the question of how YleX can justify the dire and declining degree of domestic origin in its music output. Since the commercial stations select Finnish music in a different way, domestic music content appears to provide a differentiation strategy for all stations.

The Hits and the Latest Music

Defining 'the hits' and 'the latest' music is a problem because the concepts are contentious. A hit usually refers to a song that is successful in the charts, and hits are usually time-bound, with each era having its own hits. In this article, however, we use the term 'hits' to refer to the songs that are most often rotated by radio stations, which means each station may have its own hits. The most successful hits receive a power-play status,

which means they are repeated several times a day, with the power play strengthening their hit status. The same song can have a different role and category at different stations depending on its amount of repetition and the date of release. One station may play the latest hits in the power-play category, while the other may repeat older hits in its own power-play category (Vilkko 2010).

The comparison of playlists (Table 2) indicates that the repetition of hit music has changed dramatically during the ten-year observation period. While Energy and especially YleX have decreased the repetition of their latest hits (category A), the former to a half and the latter to a third compared to 2004, KissFM/The Voice has radically increased the amount of music in category A. At least 40 per cent of its music output in 2014 consisted of current hits, which are repeated at least three times a day. The picture is supplemented by the analysis of the share of the latest music in category B. The comparison shows how YleX, in particular, contributes to the playing of latest releases – potential hits – as this makes up almost a half of the station’s music selection. Energy has also increased its emphasis on the latest releases, with as much as seventeen per cent of the station’s music in November 2014 representing category B. As the comparison of the hits already implied, KissFM/The Voice has developed its programming in a totally different direction, with latest releases making up as little as five per cent of its music output.

The comparison of the novelty of the music played shows that YleX clearly distinguishes itself from its competitors. It plays power-play hits less than the commercial stations and instead focuses on the latest releases to the extent that suggests this is a strategic choice. Conversely, our analysis also indicates a clear difference between Energy and KissFM/The Voice, as the former has increased the playing of latest releases, while the latter, more clearly than before, has concentrated on hit music only. Interestingly, as a whole, the CHR stations have all slightly decreased the share of category A hits in their music selection from 2004 to 2014.

Playlists and public service

We have analysed the music output and changes in playlists from one public service and two commercial radio station, from 2004 to 2014. Our aim was to compare how the public service YleX distinguishes itself from the commercial Radio Energy and Kiss FM/The Voice. In his earlier study, Vilkko (2010: 234), referring to the 2004 playlists, remarked that ‘YLE has imitated the strategies of the commercial side but, in spite of that, has preserved its distinctiveness’, and that ‘despite structural similarities YleX stood out as a public service broadcaster’. The same conclusion fits the music selection of 2014, in that YleX differed from the two compared stations in almost all measures we used.

We assumed that (1) the playlist of YleX would be broader and more diverse than that of the competitors, (2) its degree of domestic origin would be higher, (3) its playlist would offer more of the latest music than the playlists of the competitors and that (4) the difference between the playlists of the public service and commercial broadcasters would have broadened over time. The measures verify coherently the first, third and fourth hypotheses. YleX offers least repetition and plays the largest number of different artists and different songs, and more of the latest releases – not yet possessing hit status – than

the others. However, contrary to our hypothesis was finding that the domestic content of YleX was lower than that of The Voice in 2014. On the other hand, it played markedly more diverse Finnish music than The Voice, which concentrated on the releases of relatively few artists. In conclusion, six of our seven indicators of diversity indicated that YleX distinguished itself from its competitors more clearly in 2014 than in 2004. The differences between the stations are so clear that we have not seen it necessary to test the significance of the results statistically.

The empirical comparison also shows that, in the song-by-song analysis, the music played by the hit music stations under scrutiny differs greatly. Within the limits of their format, the head of music at each station tailors the playlist according to the assumed demand of its listenership. As a result, playlists concentrate mainly on different performances while also sharing some songs, but with different rotations. Energy and Kiss FM/The Voice did not significantly differ from each other when we used the measures concerning the breadth of the playlist. However, whereas the former focused on international hits while also offering a reasonable number of latest releases, the latter concentrated heavily on established hits while also offering a great number of Finnish songs.

If we look at the studied stations from the angle of competition in the Finnish radio industry, we can see that they are using the playlist as a tool for product differentiation and station profiling. The fact that YleX offers a lot of the latest music and plenty of individual performances reflects its intention to meet the preferences of its male audience, which is a little older than the audience of the commercial competitors. On the other hand, the objective of repeating the same hits frequently says a lot about the way the commercial stations understand the musical taste and expectations of their female audience between the ages of 15 and 24. The reciprocal differentiation between Energy and Kiss FM/The Voice is most clearly illustrated by the origin of the music; the hits of the former are foreign, while the latter leans on domestic hits too.

Even though the playlists were found to be different, the stations also shared music. During the sample week in 2014 there were only fifteen commonly shared songs while, in 2004, there were 22. Duplication can be seen as insignificant, as the stations offer an average of 180 songs a week. The most popular radio hits of the sample week in 2014 included, for instance, *Thinking Out Loud* by Ed Sheeran, *Wrapped Up* by Olly Murs, *Blame* by Calvin Harris, *Break Free* by Ariana Grande, *I'm Not the Only One* by Sam Smith and *Iholla* by Kasimir. They were played by all three stations under scrutiny. YleX, Energy and The Voice had, however, no shared category A hits.

Our study suggests that the music policy of YleX does not fully reflect any of the three ways of meeting competition provided by Hultén and Brants (1992). Rather, its competitive strategy involves combining them all. First, YleX has *adapted* by starting to use the idea of a playlist. Nevertheless, it has not copied the commercial strategies, where heavy repetition and a hit-oriented output are dominant. Second, YleX can also be seen to have *purified* its output while offering a great number of the latest releases whose popularity has not yet been tested. This form of action does not appeal to commercial players who wish to avoid taking risks. Third, the YleX playlist also shows up as a *compensation*, because its output is significantly more diverse than that of Energy and

KissFM/The Voice when measured by the number of individual performances and performers. The YleX strategy is actually some kind of a *hybrid*, reacting to the challenges of competition while, at the same time, conserving its role as a public service player. The station accepts the playlist as a tool and a means of action, but does not give it too much influence. Even though YleX, Energy and Kiss FM/The Voice represent the same format, there are few similarities between them. Whether this difference is adequate in the way that parliament's Committee of Transport and Communications demands is a political question. The biggest question is raised by the low and declining degree of domestic musical content played by YleX.

The analysis indicates that the playlist, which is meant to be used to standardize the output of music (Ahlkvist and Fisher 2000), can be used as a tool for differentiation. It also indicates that the goals set for PSBs can be implemented within the boundaries of the CHR format by offering music as diverse as possible, by minimizing the repetition of the same songs and by offering both domestic music and the newest music, i.e. not being restricted to established international hits only. According to our analysis, YleX differed from its competitors in a similar way as BBC Radio 1 did in the analysis by Hendy (2000), and neither duplicated (Berry and Waldfogel 1999; Krämer 2009) nor imitated (Dimmick and McDonald 2001) its commercial rivals, except for the fact that they all relied on the structuring effect of a playlist.

Our analysis has focused on the structures of the playlists only. We have indicated that the playlists offer a very narrow palette of hit music, suggesting that the stations avoid risks in selecting their artists. A shortfall is that the variety of the symbolic messages in the music remains hidden. Another limitation is that we do not know how important a function hit radio stations play in the music listening habits of their target audiences. In order to further analyse the changing structures of music provision and consumption and their relationship, the increasing prevalence of customer analytics used by corporate media, including YLE, deserves serious attention. As radio is increasingly being listened to via the Internet, the stations can gather more feedback from the listeners than was possible through the auditory tests typical of the earlier broadcast era (see Bonini et al. 2014; Stiernstedt 2008; Uimonen 2010). The playlists published by the radio stations act as a strong recommendation system, which has a tendency to manipulate the use of music. Whether this aim to polarize the listening and popularity of music corresponds with the principles of public service broadcasting requires more analysis.

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