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## Surveying Regional Audiences

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## Johdon yhteenveto

Hankkeessa kehitettiin yleisötutkimuksen konsepti, jossa kyselyn avulla kerätään alueellista tietoa eri medioiden käyttöön kulutetusta ajasta, käyttökonteksteista, käyttömotiiveista sekä mediasisältöjen jakamisesta ja niistä keskustelemisesta. Konseptia kehitettiin ja testattiin pilottikyselyllä, joka toteutettiin kolmen maakuntalehden (*Aamulehti*, *Kaleva*, *Keskisuomalainen*) levikkialueilla. Kyselyn kohderyhmänä oli 15–79-vuotias väestö (N=903).

Keskeiset tutkimuskysymykset olivat:

- (1) Miten eri medioita ja media-alustoja käytetään kohteena olevilla alueilla?
- (2) Miten medioiden käyttö ja käyttömotiivit eroavat erilaisissa päivittäisissä konteksteissa?
- (3) Miten mediasisältöjä jaetaan ja miten niistä keskustellaan?
- (4) Millaisia käyttäjäprofiileja voidaan muodostaa mediankäytön, käyttökontekstin ja käyttömotiivien pohjalta?

Tulosten mukaan televisio ja radio hallitsevat edelleen mediankäyttöä. Niiden rinnalle ovat nousemassa erilaiset verkkomediat, mistä kertoo erityisesti Googlen ja sosiaalisen median suuri osuus päivittäisessä mediankäytössä. Maakuntalehden paperiversio on kuitenkin säilyttänyt keskeisen roolinsa alueellisten yleisöjen keskuudessa. Maakuntalehtien verkkoversioiden lukeminen on jo melko yleistä. Sen sijaan näköislehden ja lehden mobiiliversion käyttö on vielä hyvin vähäistä. Kyselyyn vastanneet arvioivat lisäävänsä verkkolehtien sekä YLE:n ja MTV3:n verkkosivujen käyttöä seuraavan vuoden aikana. Myös television katselun internetin kautta uskotaan kasvavan. Sen sijaan vastaajat arvioivat vähentävänsä perinteisen median, kuten paperisten sanomalehtien ja television käyttöä.

Tulokset osoittavat, että yleisön mediankäyttö vaihtelee päivittäisen kontekstin mukaan. Paperista sanomalehteä luetaan tyypillisimmin aamuisin kotona, kun taas verkkomedioiden käyttö on suosituinta päivällä. Kokonaisuudessaan mediankäyttö painottuu iltaan, jolloin eniten aikaa käytetään television katseluun. Google on yhä keskeisempi mediankäyttöön liittyvä alusta suomalaisille, ja sitä käytettiin tiiviisti eri vaiheissa pitkin päivää.

Median tuottama sisältö on kyselyn tulosten mukaan tärkeä keskustelujen käynnistäjä. Suurin osa vastaajista kertoi keskustelevänsä mediasisällöistä tai jakavansa niitä viikoittain muiden ihmisten kanssa. Yleisimmin sisällöistä keskustellaan tai niitä jaetaan kasvokkain. Suosituimpia median virittämiä keskustelunaiheita ovat politiikka ja talous sekä alueelliset ja paikalliset uutisaiheet. Nämä kuuluivat kaikissa ikäryhmissä suosituimpiin keskustelunaiheisiin.

Eri medioiden viikoittaisen käyttöajan perusteella luotiin klusterianalyysin avulla kaksi erilaista käyttäjäprofiilia: ”perinteiset käyttäjät” (55 % vastaajista) ja ”digitaaliset käyttäjät” (45 %). Perinteisten käyttäjien profiiliin sijoittuvat ne, joilla korostuu television katselu sekä painetun median, kuten maakuntalehden paperiversion ja ilmaisjakelulehtien lukeminen. Digitaaliset käyttäjät puolestaan viettävät enemmän aikaa eri verkkomedioiden, kuten sosiaalisen median ja YouTuben parissa. Vanhemmat ikäryhmät ovat tyypillisimmin perinteisiä käyttäjiä, kun taas nuoremmat ikäryhmät edustavat tyypillisemmin digitaalisia käyttäjiä.

Tutkimuksessa koostettiin lisäksi kolme käyttäjäprofiilia sen mukaan, mitkä ovat mediankäytön motiivit eri konteksteissa. Ajan tasalla pysyminen uutistapahtumissa on vahvin mediankäyttöä motivoiva tekijä ”uutisorientoituneiden” ryhmässä (67 % vastaajista). ”Tapaorientoituneiden ajankuluttajien” (23 %) mediankäyttöä kuvaa ajankuluttaminen, rentoutuminen ja median käyttö tavan vuoksi. ”Monikäyttäjät” (10 %) puolestaan katsovat mediakäyttöön liittyvän useita erilaisia motiiveja. Tutkimuksen tulokset osoittavat myös, että median rutiinikäyttö läpäisee eri ikäryhmät. Median tapakäyttö ei ole tyypillistä vain vanhemmille ikäryhmille, kuten ehkä on tavattu ajatella, vaan tavat ja rutiinit hallitsevat vahvasti myös nuorempien ikäluokkien mediakäyttöä.

Tässä kehitetty yleisötutkimuskonsepti räätälöitiin mediaorganisaatioiden tarpeiden mukaan, ja samalla kehitettiin määrällisen yleisötutkimuksen metodiikkaa. Yksi konseptin eduista on, että eri medioiden käyttöä tiedustellaan kyselylomakkeessa yhdenmukaisesti. Näin eri medioiden käyttöä voidaan vertailla paremmin kuin jos tiedot jouduttaisiin keräämään eri lähteistä ja eri tavoin toteutetuista tutkimuksista. Lisäksi tutkimuksen kontekstikeskeinen lähestymistapa yleisön mediankäyttöön, median yhteisöllisen roolin huomioiminen sekä käyttäjäprofiilien kehittäminen mediankäytön ja käyttömotiivien pohjalta ovat metodologisia avauksia, joissa riittää kehitettävää myös tulevaisuudessa.

## Executive Summary

This report discusses a developing and piloting a survey research concept that informs of media use in specific regions. The concept focuses on illustrating the concrete daily media practices of audiences. The aim is to produce information that helps to depict and compare regional media use at an intermedia level. This research concept also produces distinct user profiles based on (1) the time spent consuming different media and (2) motivations given for use in different daily contexts.

The main research questions are:

- (1) How are different media and media platforms used in specific regions?
- (2) How does media use and using motivations differ in daily contexts?
- (3) How are media contents shared and discussed?
- (4) What kinds of user profiles can be found according to media use, use contexts and motivations?

To illuminate the audience's regional media use, this research employs a quantitative research method. A survey questionnaire was developed and implemented in the circulation areas of three regional newspapers (*Aamulehti*, *Kaleva* and *Keskisuomalainen*) in Jyväskylä, Oulu and Tampere. The survey targeted 15–79 year old people (N=903).

The survey questionnaire focused on four themes: (1) context and time spent with each media and media platform, (2) motivations for using each media in different contexts, (3) intentions for media use for the following year and (4) news sharing and discussing the news in different contexts.

The results show that in the weekly media use of Finnish audiences, television and radio still heavily dominate media use. However, the increase of online media is notable, and Google and social media in particular play a prominent role in people's media day. The printed regional newspaper has retained its importance for regional audiences. While the web pages of regional newspapers already have a remarkable weekly reach, the reach of newspapers' digital replica or mobile editions are still marginal.

Regarding their future media use, respondents estimate that their use of online media, such as online newspapers and magazines and the websites of *Yleisradio* (YLE) and MTV3, will increase noticeably as will watching television through the Internet. The use of traditional media, especially print newspapers and traditional television, was predicted to decrease in the near future.

What comes to use contexts, the results illustrate that people's media use varies greatly depending on the daily context. The printed newspaper is typically consumed during morning routines whereas the online media dominates media use during the daytime. Media is most intensively consumed in the evening when people spend time watching television. Google has established its position as part of people's daily practices, as it is used throughout the day in different contexts.

Media content seem to be an important source for social interaction, as a majority of the respondents discuss or share media content every week. The sharing and discussion happens mostly in face-to-face encounters, which enables discussions about regional and societal issues, such as politics and economy. These are the most discussed and shared media topics among respondents in all age groups.

One aim in this study was to build different profiles of media use starting from the variables describing the media use itself rather than demographics. Statistical multivariate methods were used to define different user types or profiles. The media use of those called 'traditional users' (55% of respondents) typically concentrates on television and print products, such as regional print newspapers or freely distributed newspapers. The media use of those called 'digital users' (45%) is focused on online digital media, such as social media and Google. The share of older users is greater in traditional uses, while younger users more often belong to the group of digital users.

In addition to the profiles of traditional users and digital users user profiles were created according to the motivations given for media use in different contexts. News consumption dominates in the largest profile group, which is called 'news oriented' (67% of respondents). The members of 'habitual time passers' (23%) are interested in passing the time, relaxing, or their media use is habitual. The media use of 'multi-purpose users' (10%) has various motivations. According to the data, media use is not only a habit of older age groups who typically consume traditional media; habits and routines also dominate the media use of the younger generation.

Besides giving information about media use among regional audiences, this study also contributes to the development of audience research methodology. This survey concept has been tailored according to the needs of media companies, e.g. by asking about the use of different media in the same way. This enables comparability of the results, which is not possible if the data were collected from several sources. Furthermore, according to our understanding, the contextual approach, researching social uses of the media, and profiling provide methodological openings that also deserve to be developed further.

## Table of Contents

Johdon yhteenveto .....	<u>2</u>
Executive Summary.....	<u>4</u>
1 Table of Tables.....	<u>7</u>
2 Table of Figures.....	<u>7</u>
3 Introduction.....	<u>8</u>
3.1 Studying media use in audience research .....	<u>8</u>
3.2 The aim and the overview of the study .....	<u>9</u>
4 Developing a new concept for audience research .....	<u>11</u>
4.1 Identifying the need for a new audience research concept.....	<u>11</u>
4.2 Research method and developing the survey questionnaire.....	<u>14</u>
4.3 Research data.....	<u>15</u>
4.4 Research themes.....	<u>16</u>
5 Results of the pilot survey.....	<u>18</u>
5.1 The reach and consumption of media.....	<u>18</u>
5.1.1 The weekly reach of the media .....	<u>20</u>
5.1.2 Comparing time spent among users with each medium .....	<u>22</u>
5.1.3 Comparing regional newspapers .....	<u>24</u>
5.2 Contexts and motivations of media use .....	<u>26</u>
5.2.1 Media use in different contexts of a day.....	<u>26</u>
5.2.2 Media profiles according to the use context.....	<u>32</u>
5.3 Future intentions in media use .....	<u>38</u>
5.4 Discussing and sharing the media content.....	<u>40</u>
5.5 User profiles in media use.....	<u>46</u>
5.5.1 'Traditional users' and 'digital users'.....	<u>47</u>
5.5.2 The 'news oriented', 'habitual time passers' and 'multi-purpose users'..	<u>50</u>
6 Conclusions.....	<u>57</u>
6.1 Reflections regarding the survey concept .....	<u>58</u>
6.2 Reflections on the results of media use .....	<u>59</u>
References .....	<u>63</u>
Appendix 1: The demographics.....	<u>65</u>

## 1 Table of Tables

Table 1. Using motivation profiles according to the age of the respondents.....	55
Table 2. Using motivation profiles according to gender and region. ....	56
Table 3. Using motivation profiles according to media use profiles.....	56

## 2 Table of Figures

Figure 1. Average daily media consumption: Minutes per day (N=903).....	19
Figure 2. Share of respondents that use a particular media at least weekly (N=903). ....	21
Figure 3. The average weekly use among those who use a particular medium at least weekly. ...	23
Figure 4. The weekly reach of the different editions of Aamulehti (Tampere region), Keskisuomalainen (Jyväskylä region) and Kaleva (Oulu region).....	24
Figure 5. The time spent using different media versions of regional newspapers. ....	25
Figure 6. Media use at home in the morning (N=903). ....	27
Figure 7. Media use at home during the daytime (N=903).....	28
Figure 8. Media use at school or in the work place (N=903). ....	29
Figure 9. Media use when waiting or travelling (N=903). ....	30
Figure 10. Media use outside home during leisure time (N=903). ....	31
Figure 11. Media use at home in the evening (N=903).....	32
Figure 12. The use of regional newspapers in different contexts.....	33
Figure 13. The use of other printed papers in different contexts. ....	34
Figure 14. The use of television and radio in different contexts.....	35
Figure 15. The use of online media sites in different contexts. ....	36
Figure 16. The alleged change in media use during the forthcoming year (N=903). ....	39
Figure 17. Sharing and discussing media topics (N=903).....	42
Figure 18. Channels for sharing and discussing media topics (N=804).....	43
Figure 19. Partners in sharing and discussing media topics (N=903). ....	44
Figure 20. The types of media topics that respondents shared or discussed (N=804). ....	45
Figure 21. The profiles of traditional users and digital users (N=903). ....	48
Figure 22. The traditional users and the digital users by gender and age (N=903). ....	50
Figure 23. The using motivations of the media in three different contexts (N=903).....	51
Figure 24. The news oriented profile (67% of the respondents).....	53
Figure 25. Habitual time passers (23% of the respondents). ....	54
Figure 26. Multi-purpose users (10% of the respondents). ....	55



### 3 Introduction

#### 3.1 Studying media use in audience research

The complexity of the media environment, the increasing supply of media products and constantly developing media technology have transformed the way we think about audiences. Previously, the media audience was a passive recipient of media content. Current understanding of the audience emphasises that people's opinions and ways of using media are not that straightforward (e.g. Ross & Nightingale 2003; Livingstone 2005). The term audience is now used to refer to large groups of people who are thought to be relatively heterogeneous and increasingly segregated.

Media use is said to have become more social. People actively engage in producing media content, and media topics are also actively shared and discussed (Harju & Vehmas 2012; Heikkilä et al. 2012). Social media and television's reality programmes (see van Zoonen 2005) are good examples of people engaging actively in producing and sharing media content. Similarly, in participatory journalism, the audience broadly takes part in journalistic production processes, such as innovating daily events to be covered, contributing with photos or videos and discussing topics on different media platforms (Singer et al. 2011; Heinonen 2008).

The current diversity of people's media use encourages the pinning down of specifics in the current 'media audiencehood'. Following Ridell (2011, 62), we can ask 'how acting as an audience relates to, is entangled with and differs from other, increasingly networked and mobile forms of living and doing things with the media in present-day thoroughly digitalised environments'. This calls for increasing attention to the various *contexts* of people's daily media use and sorting out how and in what situations they find a particular medium to be of use in the course of the day.

The transformation in audience's media use is extremely visible among the younger generation for whom the Internet and social media are the major sources of (news) information. The media use of the young generation has been described as short-term, interactive and highly social. This seems to be especially true within 'digital natives', those who were born in the era of social and ubiquitous media (see Herkman & Vainikka 2012),

whereas the older generations have maintained their traditional media use habits. Hence, in the current situation in which the media is undergoing changes, from the media organisations' point of view, it becomes crucial to comprehend the variety of the audiences' media consumption and to develop methodological tools that serve to acquire information about use patterns.

### 3.2 The aim and the overview of the study

Building on both academic and commercial user study traditions and the work already done in the NextMedia programme, this report presents a research concept that produces knowledge of media use in specific regions. The concept focuses on concrete daily media practices instead of overall lifestyles or values. The aim is to produce information that helps to depict and compare the regional media use at an intermedia level. The research concept also produces distinct user profiles based on consumption of different media and the motivations given for use in daily contexts.

The main research questions are:

- (1) How are different media and media platforms used in specific regions?
- (2) How do media use and using motivations differ in different context during the day?
- (3) How are media contents shared and discussed?
- (4) What kinds of user profiles can be found according to media use, use contexts and using motivations?

The research concept presented in this report serves Finnish media companies by producing information about the relevance of media in people's life. This information is needed both for media marketing purposes and for developing media contents. Studying consumers' media use becomes extremely relevant in situations where the media field is facing economic and technological challenges that have an effect on the concrete work practices and the structures of media organisations (see Fenton 2010; Väliverronen 2009). The increasing competition between media companies for audience attention emphasises the need to actively follow and map out audience needs and patterns of different media use. This is essential for media organisations to understand why their products are (or are not) relevant to their customers.

In addition to serving the practical needs of the media industry, the concept contributes to academic research by (1) advancing currently underdeveloped survey methodology for studying social aspects of the use of the media, (2) creating methods for testing the results of qualitative user studies with survey methodology and thus improving generalisability and (3) developing ways for using statistical multivariate methods to create distinct user profiles according to the media use, contexts of use and using motivations.

In Chapter 2 we more thoroughly describe the need for this research concept as well as its developing process. The data and the themes of the pilot survey are also described in Chapter 2. The results of the pilot survey are presented in Chapter 3. The concept developed and the pilot survey conducted are summarised and evaluated in Chapter 4.

## 4 Developing a new concept for audience research

### 4.1 Identifying the need for a new audience research concept

Audience measurement is a type of audience research that documents the size and structure of media audiences. This approach enables the comparison of audiences over time and from one medium to another (Ross & Nightingale 2003). Audience surveys that produce demographic data are a typical form of audience research in which surveys are used as a part of the product development process or to gather background information for marketing purposes (see Heinonen 2008). Practices like audience targeting, niche advertising and audience segmentation have been developed to serve media organisations and advertisers to locate people who are willing and able to buy products (Ross & Nightingale 2003, 54).

In Finland, audience research that is utilised in media organisations can be divided into two strains: (1) audience research that scrutinises the overall lifestyles and values of the Finnish audience, such as RISC Monitor by TNS Gallup and Valuegraphics by Taloustutkimus, and (2) audience research that measures particular media use, such as the research implemented by the National Readership Survey, Finnpanel's National Radio Survey and TV audience measurement and TNS Atlas by TNS Gallup (Heinonen 2008; Suhonen 2006).

RISC Monitor collects data on 15–75-year-old Finnish people through phone interviews and questionnaires that are sent by mail. In a similar way, data in Valuegraphics is gathered using a questionnaire that is sent to 15–79-year-old people by mail. Both of these surveys describe the values, lifestyles and changes among Finnish people who are part of the RISC analysis. The data is divided into nine or ten categories based on attitudes, such as the 'show-ups' (*näyttäytyjät*) or the 'rapids' (*nopeatempoiset*). However, Suhonen (2006) has criticised these surveys because they tend to exaggerate the differences in attitudes between the groups (143–157.)

According to Heinonen (2008), the National Readership Survey is the most widely used audience survey format by Finnish media organisations. It is implemented using phone interviews and an Internet survey. It produces information about the structure of audiences, their reading habits, general media use, purchasing habits, attitudes and the use of products and services. However, the information provided by the National Readership Survey has not

been seen to directly support attempts to improve media content (Heinonen 2008, 40). In addition, different kinds of audience panels are widely used by Finnish media companies to map out consumers' daily media practices. Information on media use is also presented in the Finnish Mass Media report by Statistics Finland (2012), which provides a comprehensive statistical overview of the Finnish media scene. The report presents the following topics in separate chapters: mass media economy and consumption, newspapers, magazines and online media services. The data is produced by utilising research data from various sources, such as TNS Gallup, Statistics Finland, The Finnish Audit Bureau of Circulation and Finnpanel. For example, television viewing is reported in channel shares in population groups and in total viewing time based on data collected using Finnpanel's TV measurement tool. Currently, the various audience research surveys produce scattered data that cannot easily be combined to meet the needs of regional media companies, or they produce data that is too expensive for these companies. Some products also require a specific analysing tool that only the biggest media companies have.

This study aims to develop a research concept that produces extensive information on audience media use in one survey that can be conducted with reasonable resources. The concept developed here is tailored to be particularly useful to media companies mainly operating in specific regional areas. The information gathered in the survey is thought to be useful both for media marketing purposes and for developing media content. To complement existing research products, this research concept offers at least seven strengths that are important to media companies that need relevant information on media use in their market areas.

First, the media included in the survey are tailored according to the needs of media companies. For example, in addition to the traditional print and electronic media, social media, Google, YouTube and different online products (web, replica, mobile) are included. Social media, Google and YouTube have an important role both in the daily media routines of the people and in advertising markets. For media companies, it is vital to understand how these newcomers relate to their own media products in people's daily practices.

Second, in this research concept, questions about different media uses are asked in a similar way. This makes the results more comparable than if the data were collected from different

surveys using different methods (as is the case in the Finnish Mass Media report by Statistics Finland).

Third, this research concept provides information on the contexts of the media use, which currently is—as far as we know—lacking in the Finnish audience research surveys. The only study we know that comes near this is TNS Atlas Intermedia that reports the time the media is used. Still, our concept goes further. It is developed to gain knowledge of peoples' ways of consuming media in different social contexts: at home in the morning, at home during the day, at school or at the workplace, when waiting or on the move, outside the home at leisure time and at home in the evening. The motivation for studying these contexts is the idea that media use is tightly connected to other daily routines. If other routines do not change, the media routines do not change either—or the change is very slow (Harju & Vehmas 2012, 19).

Fourth, the concept includes surveying social interaction generated by media use and media contents. The respondents are asked with whom they talk or share issues they heard or read about in the media. It also asks about kinds of topics shared. The theoretical assumption here is that the relevance of the news and media in people's everyday lives is partly constructed by the way their media use or news is discussed, shared and reworked in both face-to-face and social media contexts (see Heikkilä et al. 2012). This is a novel approach that is not available in mainstream audience surveys; it has been a topic mostly used in qualitative audience research (see Heikkilä et al. 2012; Harju & Vehmas 2012).

Fifth, this research concept formulates user profiles that are based on (1) the weekly time people use different media and (2) what kinds of motivations are report for media use in different contexts. A profile-based approach is currently used when studying audience values, attitudes and lifestyles (see RISC Monitor). However, when measuring media use, it has been customary to analyse data demographically. Our assumption is that there are typical patterns of media use or using motivations that may be common to people of both genders or of different age groups; the demographic approach does not necessarily capture these patterns.

Sixth, this survey concept is tailored particularly to the needs of regional media to support knowledge acquisition about the needs and practices of people who live in their circulation areas. This kind of information seems essential if media companies are to stay aware of the

use patterns of their regional audiences and develop organisational strategies, contents and marketing. So far, this kind of regional data has not been easily available to media companies.

Seventh, this survey concept will later be connected to the automatic media exposure tracking system that is currently being developed by VTT in the NextMedia program. The system produces contextual information on people's media use, which can be compared with the data gathered in the survey. The system was tested with users recruited for survey interviews. The test results will be reported by the VTT research team.

## 4.2 Research method and developing the survey questionnaire

To illuminate the audience's regional media use, this research employs a quantitative research method. A survey questionnaire was developed and implemented in three regional areas, Jyväskylä, Oulu and Tampere. The first draft of the questionnaire was developed by Tampere Research Centre for Journalism, Media and Communication (COMET) in University of Tampere and Tietoykkönen Oy. COMET focused on the questions of the motivations and roles of media use in different contexts and situations and on the theme of news sharing and discussing the news. Tietoykkönen was responsible for developing questions for the themes of concrete use of media products and intentions in media use. The second draft was discussed and developed together with research personnel from COMET, Tietoykkönen, Alma Media and Kaleva. In this discussion, it was decided to refine the questions on the use of online media products by regional newspapers in the questionnaire. In the discussions, there was an acknowledgement of the need to acquire more versatile information on the use of regional media and to be able to collect information on the different devices or platforms that were used. Hence, online and mobile versions of the regional newspapers were added to the questionnaire, as well as Google and YouTube services.

The survey questionnaire was tested by COMET in 14 face-to-face test-interviews in different phases of the planning of the survey. In total, the questionnaire draft was developed and reformulated in six test rounds (test interviews were conducted in four rounds). The duration of the test interviews varied from 18 minutes to 33 minutes. The average time of the test interview was 24 minutes in the first round (seven interviews), 22 minutes in the second test round (three interviews), 27 minutes in the third test round (two interviews) and 22 minutes in the last test round (two interviews).

After the six test rounds, changes were made to a question regarding the use of the regional newspaper. It was decided that the question would focus on the product (printed paper, online version, digital replica, mobile application) and not on the device the respondents used to follow the newspaper. In addition, the question regarding the use of television was reformulated.

After the face-to-face test interviews, the final questionnaire was tested in 21 phone interviews conducted by Tietoykkönen. The duration of these interviews varied from 10 to 21 minutes, the average time was 14 minutes. The research data was analysed statistically. Cross-tabulations and statistical multivariate methods, such as cluster analysis and latent class analysis were used.

### 4.3 Research data

The survey targeted 15 to 79-year-old people living in each newspaper's circulation area (regions of Tampere, Oulu and Jyväskylä). In Tampere and Jyväskylä, the sample area followed the circulation areas of the regional newspapers. In Oulu, the sample area differed from the total circulation area of Kaleva. The sample was collected from a geographically narrower area. The decision to restrict the sample area was made because the actual circulation area would have been too vast and not commensurable with the sample areas of Tampere and Jyväskylä.

Telephone interviews were used to collect the data. The telephone interviews were conducted in the periods of 19 June 2013–28 June 2013 and 29 July 2013–14 August 2013. Three hundred and one interviews were made in each newspaper's market area, which produced 903 interviews. The sample of the survey represents the overall spatial populations of each market area. The interviews lasted 8–25 minutes. The average duration was 13.4 minutes. The interviews were conducted during of summer vacations, which may have influenced the results, as the time people consume media then may differ slightly from the non-vacation media use.

Of the respondents, 50% were male (451 respondents) and 50% female (452 respondents); 22% were 25–34 years old, this being the biggest age group among the respondents. In the sample, 14% were under 25 years old, 17% were 35–44 years old, 14% 45–54 years old, 17%



55–64 years old and 15% were older than 65 years. Most of the respondents, 70% (636 respondents), lived in a household with no children, and 30% (267 respondents) lived in a household with children under 18 years old (see tables in Appendix 1).

A little more than a half of the respondents were active in working life: 21% were retired and 13% were students on courses or in military or civil service. The most common education level (31%) was in vocational/technical/business schools. One third of the respondents lived in a household with total incomes of 25,000–49,999 euros a year (before taxes). One quarter earned less, one quarter earned more and 17% didn't say (see tables in Appendix 1).

#### 4.4 Research themes

The survey questionnaire includes four themes:

- use context and time used with each media and media platform
- motivation for using each media in different contexts and situations
- intentions for media use for the following year
- news sharing and discussing the news in different contexts and situations

The frequency of media use was approached by asking on how many days a week the user used a particular medium, such as a print version of a regional newspaper. The respondents were also asked to give estimates of the time they use different types of media in minutes. The questionnaire also included questions about the use of social media services (for example, if the user uses Facebook, Twitter, LinkedIn, Pinterest, etc.). To determine use of different media technology, the survey included a question about whether the user used the Internet and if they used it with a computer, tablet or mobile phone. In addition to the use time, the survey included a question on the daily use context. This was examined by asking the respondents which media they used at different times of the day. The day was divided into six phases: (1) at home in the morning, (2) at home during the day, (3) at school or at the workplace, (4) when going to somewhere or waiting, (5) when outside home during leisure time or (6) at home in the evening. This was meant to illuminate the relevance of different media in different contexts.

When asking about motivations for using media in different contexts during the day, the motivations were divided into nine categories: (1) to follow the news, (2) to have background

information and views, (3) to have tips for daily life, (4) to have information on offers and products, (5) to find topics for discussion, (6) to relax, (7) to pass the time, (8) to be alone or (9) because media use was a habit. The question also included an option 'cannot say'.

We were interested in the audience's media use in current situations, but we also wanted to find out how people predicted their future media use. Intentions for media use were tackled by asking respondents to estimate how their use of different media would change within the current year. Changes in media growth were put into five categories: (1) grow notably, (2) grow slightly, (3) stay the same, (4) slightly diminish or (5) diminish notably. The media listed in this question were (1) printed papers, (2) online newspapers or web pages of YLE or MTV3, (3) television, (4) television through the Internet, (5) radio, (6) social media like Facebook and Twitter and (7) Google, YouTube and blogs.

The sharing of news was studied by asking with whom and how often the respondents share and discuss news and on what kind of topics. By asking with whom the respondents shared and discussed various media content, the research hoped to discover the role of social networks in everyday media use. The way respondents share the contents (face-to-face, phone, email, in public online communities or in closed online communities) was also asked.

In the next chapter, the research results are discussed in five sections: (1) audience weekly media use, (2) context of media use, (3) future intentions for media use, (4) discussing and sharing media content and (5) user profiles in media use. The regional aspect is emphasised when there are distinct variations in the results in relation to regional audiences. It must be acknowledged that this research does not produce objective data of audience media use; data is based on the people's own perceptions of how their daily media use changes during the day.

## 5 Results of the pilot survey

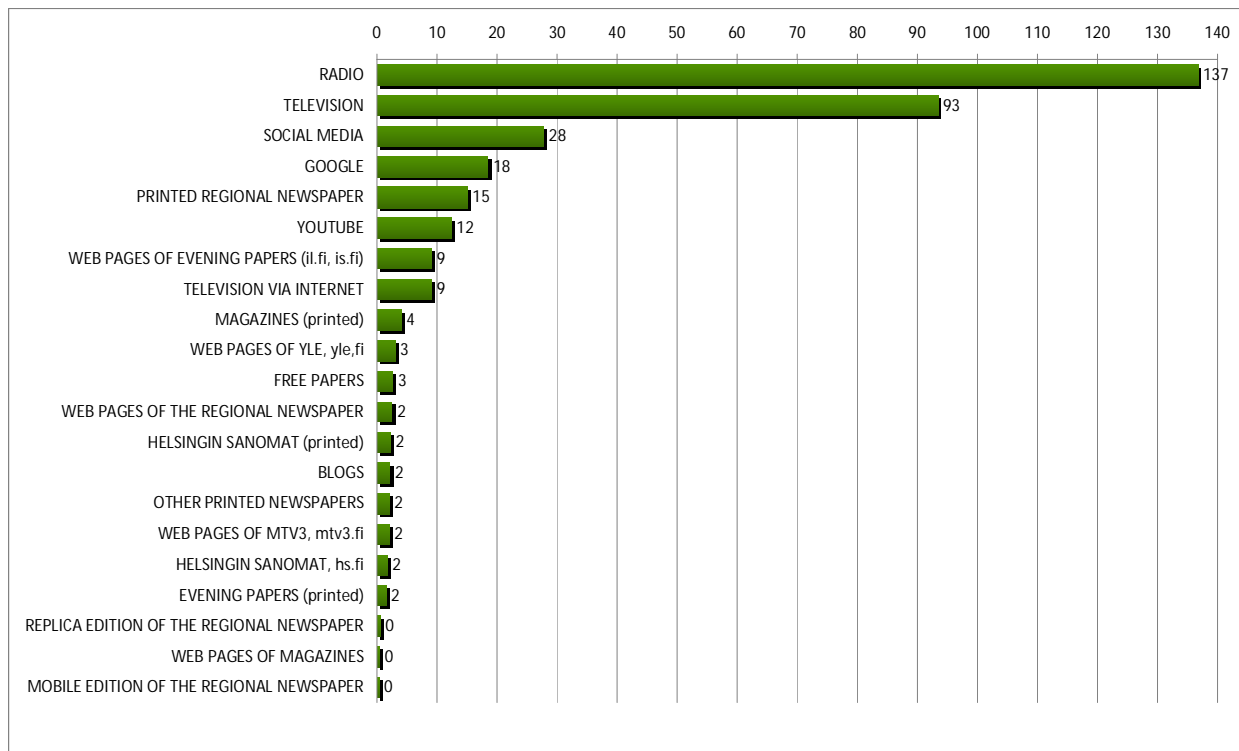
### 5.1 The reach and consumption of media

The customary reference when talking about how much time Finns spend with the media is the TNS Atlas Intermedia study by TNS Gallup Oy. It tells us that, on average, the Finns consume eight hours 39 minutes of media per day. These figures include simultaneous consumption, for example, reading the newspaper and listening to the radio. The result also depends on what media are included in the survey. TNS Atlas Intermedia shows the distribution of the total time consumed by the media as television (30%), Internet (28%), radio (19%), newspapers (6%), literature (6%), recorded music (6%), magazines (4%), DVD/video (2%) and free newspapers (1%) (TNS Gallup Oy 2013).

In our research, the varieties of media differ from TNS Atlas. We did not include literature, recorded music or DVDs and videos.<sup>1</sup> The results also depend on how media use is asked about or measured. In our concept, the respondents were asked how many days in a week they used a particular medium; if using a medium on at least one day, they were asked in what contexts the medium was used and how much time it took up in one day. In Figure 3.1, the average time spent using each medium is calculated by multiplying the reported time of daily consumption by the number of days the respondents said they used a particular medium in a week. The sum was divided by seven (the number of days in a week). This gives a more reliable result than if the respondents had only estimated their 'average daily use'. It is always difficult to estimate the time used with different media, and the results are more about people's image of their own media use than the real time used.

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<sup>1</sup> Without these media, total media consumption according to TNS Atlas Intermedia is a little bit more than seven hours.

**Figure 1. Average daily media consumption: Minutes per day (N=903).**

Our concept also differs from TNS Atlas Intermedia's public results in that the different media in the Internet section are reported in more detail. Social Media, Google, YouTube, and different online outlets of the regional newspaper are reported separately. The use of different printed media is also reported in more detail. As it can be seen in Figure 1, our results differ from those obtained by TNS Atlas Intermedia in that the most used media is radio, not television. Total media use time is also different—only five hours and 46 minutes. Similarly, with TNS Atlas Intermedia, this includes simultaneous media use. The research methods differ in other ways, making it difficult to directly compare the results.

When compared to the Finnpanel-study reported by Statistics Finland, the daily television viewing time in our study is clearly lower at only 1.5 hours. Finnpanel shows almost three hours of daily viewing time in 2010 (Statistics Finland 2012, 132). TNS Atlas also reports approximately 2.5 hours of average television viewing (TNS Gallup 2013). The differences are, of course, caused of the differences in the methodology. Finnpanel, for example, uses a

device with which people signal when they start and end viewing. The somewhat small daily using times in Figure 3.1 are also due to the fact that the media are used only by a section of respondents. For example, the average reading time of a printed regional newspaper among all of the respondents is 15 minutes per day; however, among those who read newspapers at least once a week (n=561), the average reading time is 24 minutes per day.<sup>2</sup> It may also be that the summer period may affect the results. During the summer and on vacation, people may watch less television. It is also possible that the interviewees underestimated their viewing time.

### 5.1.1 The weekly reach of the media

For the respondents, it is easier to say how many days in a week they use a particular medium than it is to estimate average using time. Therefore, the weekly reach is a more reliable estimate of media use than self-reported using time. The weekly reach of each media is reported in Figure 2. These results also confirm that television (87%) and radio (86%) still dominate media use by regional audiences. However, 85% of the respondents also use Google at least once a week.<sup>3</sup> The second popular group of media are printed regional newspapers (62%), free newspapers (61%), and the web pages of evening tabloids (61%). However, the free newspapers are typically read only once or twice a week.

The least frequently used media were the replica or mobile outlets of the regional newspapers and magazine web editions. These were used weekly by only by 3–4% of the respondents. Compared to these, the web-editions of regional newspapers were more popular. They were used by 30% of the respondents.

Tabloid press was used every week by 20% of the people; 14% used the print version of *Helsingin Sanomat* weekly but the use of its online version, *hs.fi*, was a bit higher (20%). About one third of the respondents (29%) used other newspapers (such as local newspapers) on a weekly basis.

Social media seems to be a firm part of people's everyday media use as 55% use it at least weekly and 36% use it daily. Currently, Facebook seems to be the most popular social media.

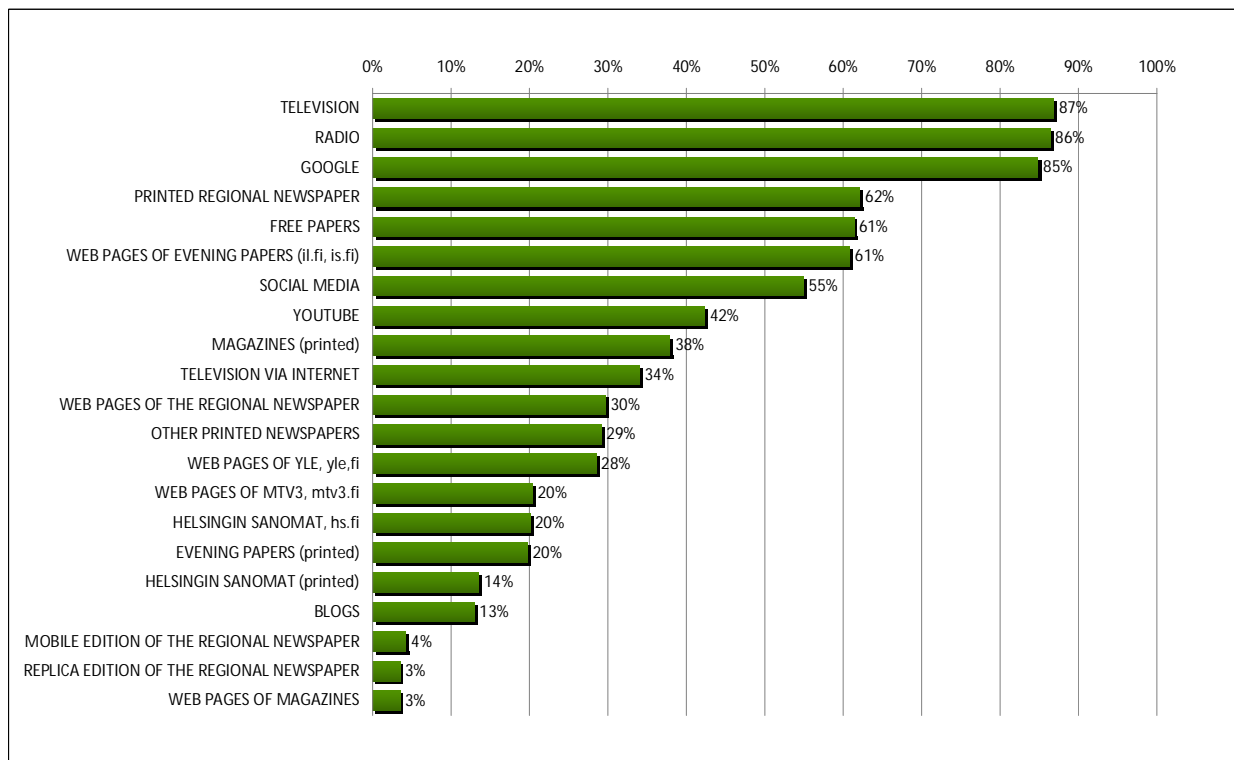
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<sup>2</sup> Figure 1 shows the popularity of each medium within the population. If non-users were omitted from the calculations, this would not be the case.

<sup>3</sup> The popularity of Google is understandable because it mainly is a way to find different media content. The users of other media use it first, and this partially explains its popularity.

It is used by 60% of those who use the Internet. The gap between Facebook and the next popular social media sites (namely discussion sites and Twitter) is huge; as only 7% of Internet users said they use discussion sites (suomi24.fi, vauva.fi etc.). The Twitter share was similar.

**Figure 2. Share of respondents that use a particular media at least weekly (N=903).**



The share of television and radio users reported by the Statistics Finland Finnish Mass Media 2011 report differs from our findings. According to the report, in 2010, 74% of Finnish people watched television and 78% listened to radio ‘on an average day’. The percentage of television viewing is based on Finnpanel television measurement, and the percentage of radio listening is based on National Radio Study by Finnpanel that uses a media diary method. These figures cannot be directly compared to our result of 87% of respondents viewing television at least once a week and 86% of respondents listening radio at least weekly. However, the results are not hugely different.

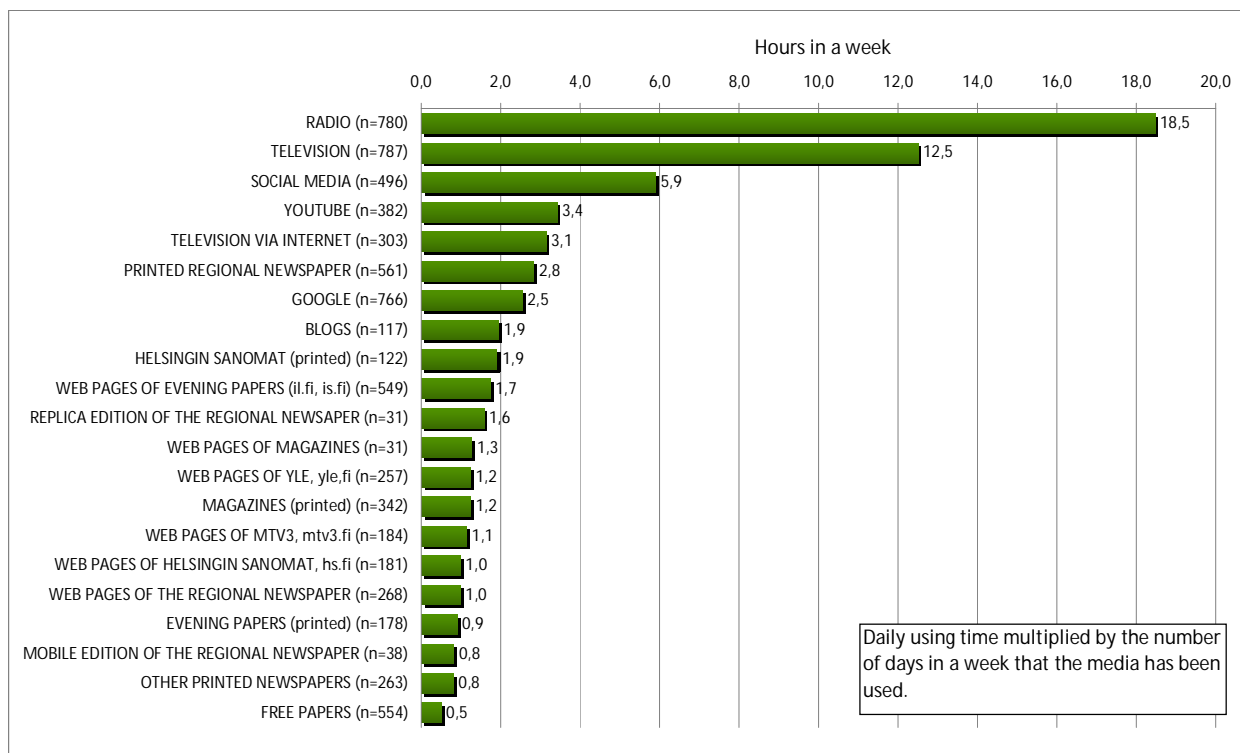
In general, according to Statistics Finland (2012, 114) the reach of television fell slightly during the 2000s. Radio has retained its role in people’s everyday life. According to previous studies, there seems to be a clear division between age groups, as older age groups listen to

the radio more often than younger people: in 2010 the daily reach of radio was 88% among 65-year-old or older people and only 67% among 15–24-year-old people. (Statistics Finland 2012, 108). However, in our survey, there is no such difference. Within both groups, the weekly reach of radio is 84%. Meanwhile, the differences are great in the other most used media in both groups. For respondents under 25 years, the five most popular media are Google (weekly reach 95%), social media (94%), YouTube (85%), radio (84%) and television (79%). For the 65-year-old or older people, the five most popular media are television (95%), printed regional newspaper (89%), radio (84%), free papers (79%) and Google (60%). In the case of printed regional newspapers, the difference between the oldest and youngest age group is great. For the oldest group, newspaper reach is the second highest (89%); for the youngest group, newspaper reach is eighth (42%).

### **5.1.2 Comparing time spent among users with each medium**

The time spent using different media can also be compared among those who use each media at least weekly (Figure 3). This approach does not describe how popular each medium is among all members of the population. Instead, it describes the typical use patterns among those who use each medium.

**Figure 3. The average weekly use among those who use a particular medium at least weekly.**



From Figure 3, we can also see that radio and television are the most popular media (see also Figures 3.1 and 3.2). Respondents who listen to the radio weekly, listen to it, on average for 18.5 hours a week. Television viewers view television 12.5 hours a week. Social media (5.9 hours/week) YouTube (3.4), television via Internet (3.1), printed regional newspaper (2.8) and Google (2.5) are also media that are typically used weekly for a long time.

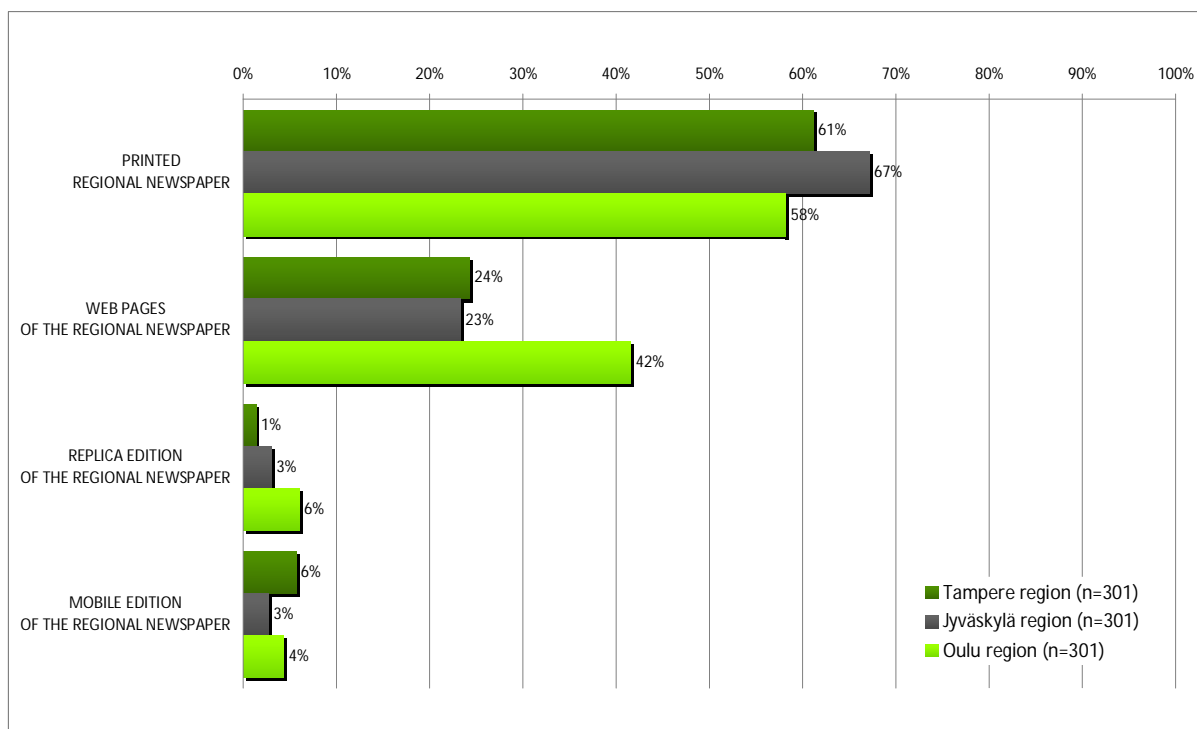
People do not spend that much time reading other forms of regional newspapers, e.g. the mobile version (0.8 hours a week), its online version (1.0) or the digital replica (1.6). Freely distributed newspapers (0.5) other newspapers, e.g. local newspapers (0.8), tabloid press (0.9) or online version of *Helsingin Sanomat* (1.0), were among the least used news media in terms of how much weekly users invest time in them in a week.



### 5.1.3 Comparing regional newspapers

There are some differences between the regional newspapers chosen for our study. Most striking is the popularity of the online version of *Kaleva*. In the Oulu area, 42% of the regional audience uses the online version of *Kaleva* weekly, whereas the figures are clearly smaller with the online version of *Keskisuomalainen* (23%) and *Aamulehti* (24%). The heavy use of *Kaleva* in the Oulu area might result from active efforts to develop its online version. However, it seems that the share of the readers of the print version has diminished. The print edition of *Kaleva* had fewer weekly (58%) and daily (36%) readers than *Keskisuomalainen* (67%, 45%) and *Aamulehti* (61%, 42%). The use of the digital replica and the mobile version were scant regardless of the newspaper.

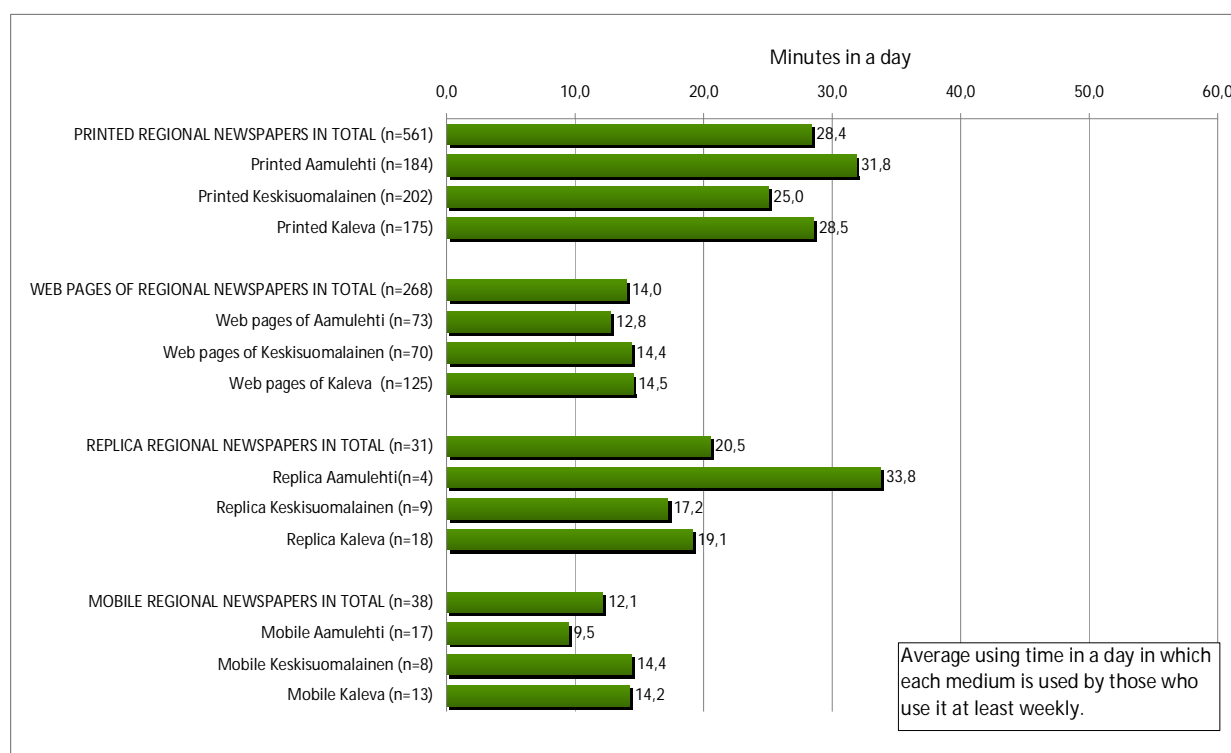
**Figure 4. The weekly reach of the different editions of *Aamulehti* (Tampere region), *Keskisuomalainen* (Jyväskylä region) and *Kaleva* (Oulu region).**



When looking at the time people spend with a particular newspaper (Figure 5), we noticed that respondents in the *Aamulehti* circulation area spent more time reading its print version (31.8 minutes) than the audience in the circulation areas of Jyväskylä and Oulu used to read their regional newspapers (*Kaleva* 28.5 and *Keskisuomalainen* 25.0). These figures represent the time that respondents use reading their newspaper on the days that they read it at all. It can

also be seen from Figure 3.5 that the differences in the reading time of regional newspaper web editions are not very big; the average time reading them is approximately 14 minutes. The number of readers of replica and mobile editions is so small that newspapers cannot be compared. However, it seems that the average time reading a replica paper is approximately 20 minutes per day, and the average time reading a mobile edition is approximately 12 minutes per day.

**Figure 5. The time spent using different media versions of regional newspapers.**



To sum up, traditional media such as television and radio continue to play a major role in the media use of the Finnish audience. It must be noted that the interviews were conducted during summer vacations, which may have increased the radio share in the survey results. The survey also confirmed that among online media, Google and social media play a prominent role in people's media use, and the use of social media concentrates on Facebook. In terms of newspapers, the findings illustrate that in spite of the drastic changes in the media field, the printed regional papers still play a prominent role in the media day of regional audiences. However, its position is a lot of stronger in older generation than in younger. For respondents under 25 years, newspapers' weekly reach was only 42%.

## 5.2 Contexts and motivations of media use

### 5.2.1 Media use in different contexts of a day

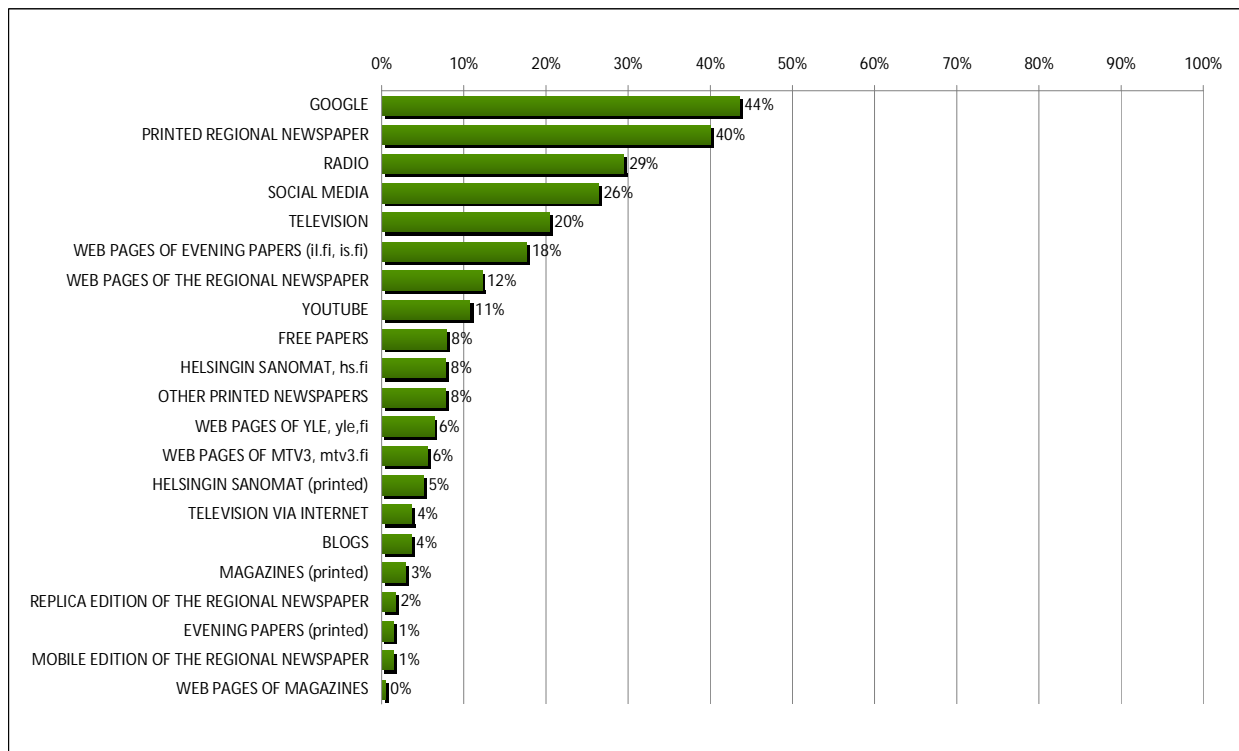
In addition to the time spent with the media, we wanted to find out how the use of media is allocated at different phases of the day and in what contexts people use particular media. This was based on an assumption that the contexts in which people use media would reveal what media best serves people's activities at different times of the day. The use contexts were divided into six categories: (1) at home in the morning, (2) at home during the day, (3) at school or at work, (4) when waiting or being on the move, (5) outside home at leisure time and (6) at home in the evening. This categorisation aims to distinguish which media play a particular role at different phases of the day, e.g. which media are connected to the morning routines and which are commonly used in the workplace.

In addition to contexts, we wanted to know what drives people to consume media at different stages of the day. Therefore, the questionnaire included questions on the motivations for using particular media at a particular time of the day. To avoid the questionnaire becoming too long, these motivations were asked only in connection with three of the contexts: at home in the morning, when waiting or on the move and at home in the evening. Motivations for media use were divided into nine categories: (1) to pass the time, (2) to be aware of news events, (3) to relax, (4) to have background information and viewpoints, (5) to have tips for daily life, (6) to find topics for conversation, (7) to find information on offers and products, (8) habitual use (9) to have a minute alone to escape the world. The tenth option available was 'I can't say'. The respondents were free to choose all the options they felt applied.

According to our data (Figure 6), it seems that online media use is heavy at breakfast tables in Finnish families. Google is the most commonly used media at home in the morning, and 44% of the respondents use it at this hour of the day. Although Google has the highest place, 40% of people still read the printed regional newspaper at home in the morning. Listening to the radio, using social media and watching television were also part of audience media use at this hour of the day. These findings support the assumption that traditional news media still have an important role in the people's media use in the morning, i.e. reading the print version of a regional newspaper or listening to radio is a routine start to the day. However, as the heavy

use of Google shows, online media seems to be increasingly present in morning routines. The other versions of regional newspapers were not that visible. Mobile version and digital replica use was minimal when compared to the use of the print newspaper. The percentages in Figures 6–11 show the share of the respondents who use each media in a particular context at least once a week.

**Figure 6. Media use at home in the morning (N=903).**

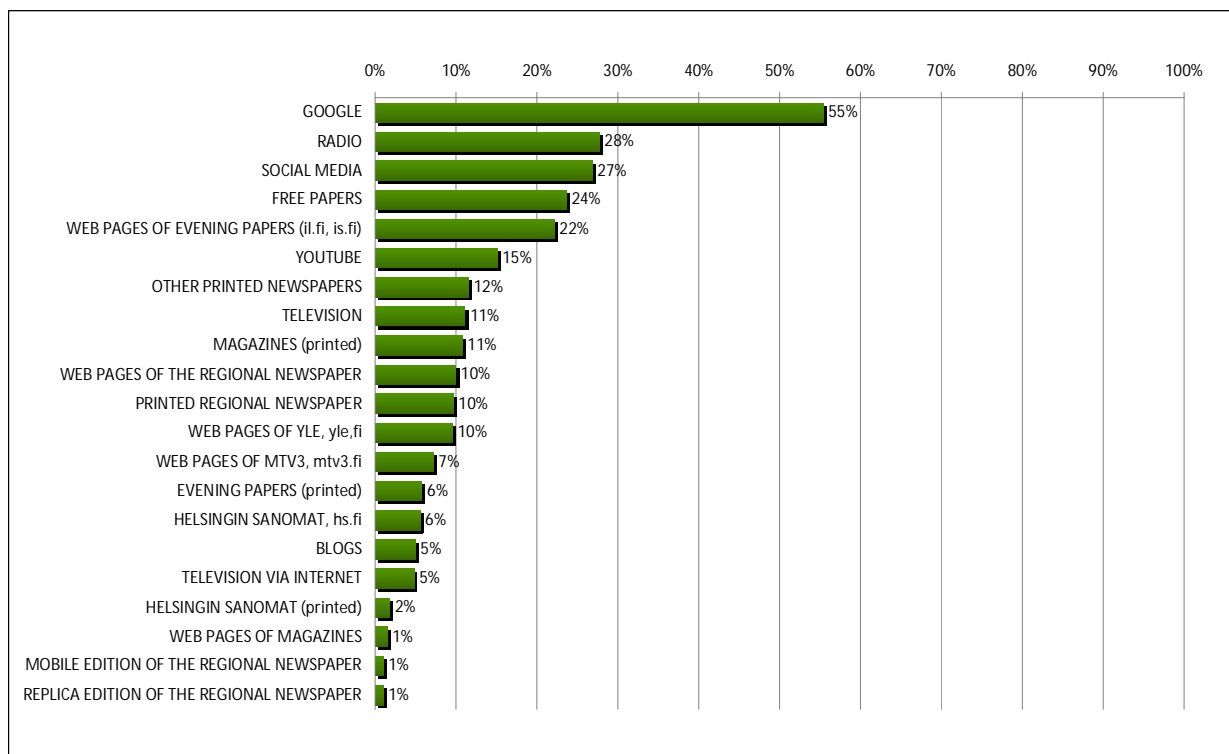


The main motivation for media use in the morning is the need to be aware of news events for the day. For 77% of the respondents, this was an important reason to use media. For 31%, the use was habitual—they explained morning media use as something they are used to. Twenty-five per cent of people looked for background information and viewpoints from the media to start their day.

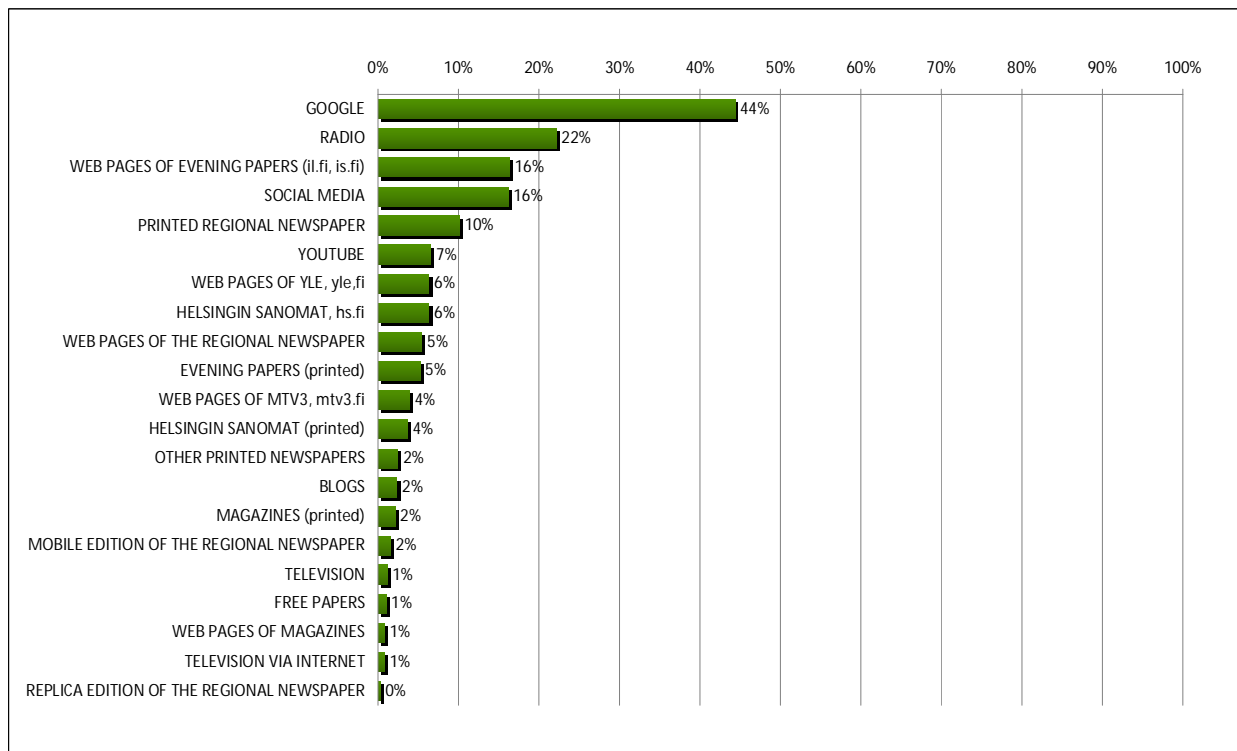
Media use at home during the day (Figure 7) focuses on online media. Google was the most popular media, as 55% of the people reported using it during the daytime. Social media and the online sites of the tabloid press also scored relatively high. Of the traditional media, radio (28%) kept its place at the top of the media list during the day at home. The use of the print

version of the regional newspaper was notably lower during the day than in the morning. The other forms of newspaper—online site, mobile version and digital replica—had similar use figures as their morning use.

**Figure 7. Media use at home during the daytime (N=903).**

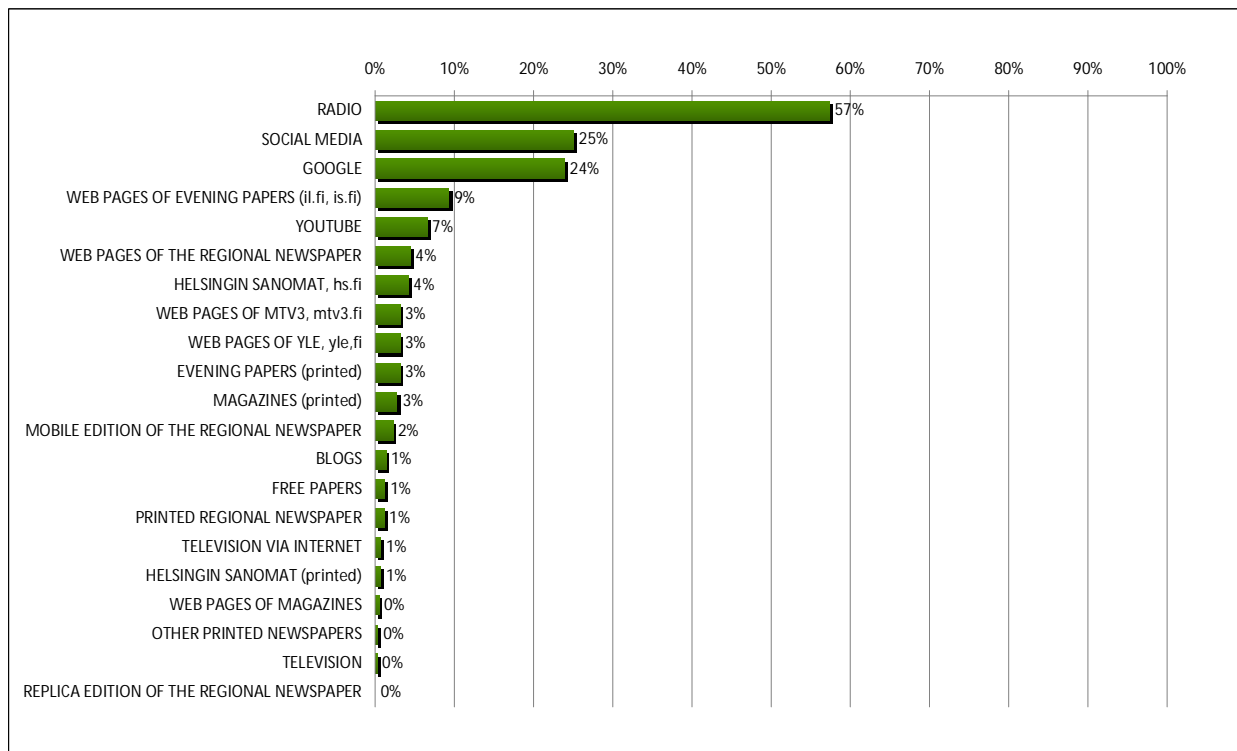


Similar to at home daytime use, media use at school or in the workplace (Figure 8) is heavily based on online use. Google (44%), the online sites of tabloid press (16%) and the social media (16%) were usually consumed at this hour of the day. The particularly heavy use of Google shows that media use at work or at school is led by the need to find information. In general, the emphasis on online media implies the high use of computers, tablets and smart phones at school and workplaces, which enable the use of various online and mobile services, such as social media or newspapers’ online sites. Besides the online media, radio also has an important role at work or at school. Television, freely distributed newspapers, the online sites of magazines, television via the Internet and the digital replica of the regional newspapers were the least used media at work or at school.

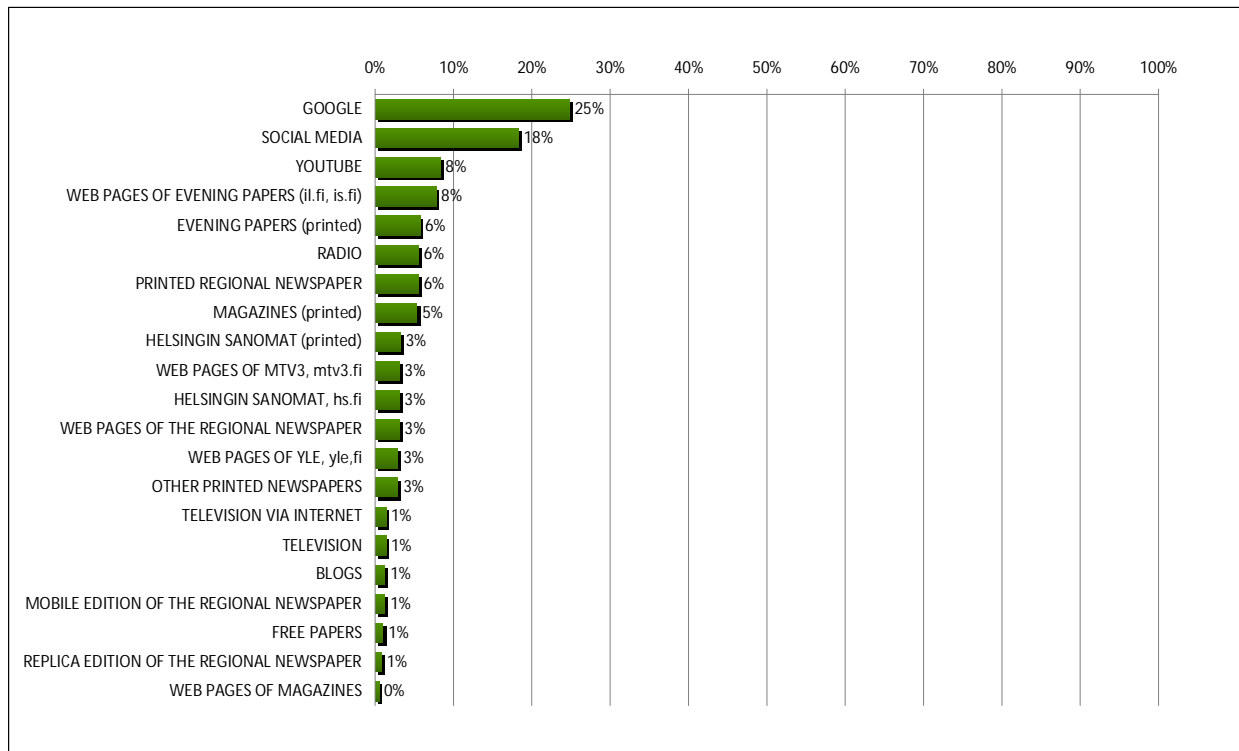
**Figure 8. Media use at school or in the work place (N=903).**

Observations of people waiting or going somewhere (Figure 9) show radio is clearly dominant, as over half of all the respondents (57%) listen to the radio then. Social media (25%) and Google (24%) were also among popularly used media in these situations. The digital replica of the regional newspaper, television and other newspapers had, again, the lowest use rates. Media use when waiting or when on the move is typically filled with interruptions that prevent consistent concentration on reading or watching. This probably explains the popularity of radio, which enables people to simultaneously observe the environment, or online media that contains fast checkable content.

Passing the time was the main reason for using media when waiting or when on the move. This was identified by 52% of the people as an important reason for using media in this use context. People also experienced a need to be aware of news events (34%) and consumed media out of habit (19%).

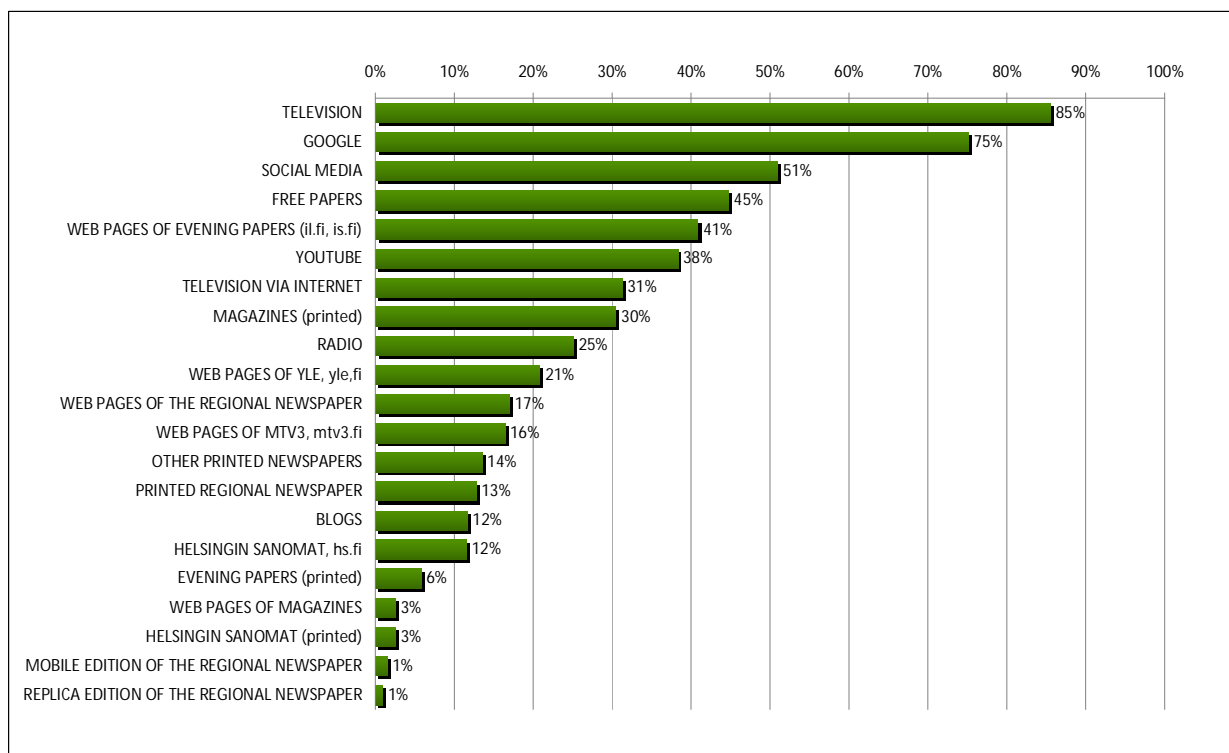
**Figure 9. Media use when waiting or travelling (N=903).**

Media use outside the home during leisure time (Figure 10) continues to rely on online media use. Google, social media and YouTube were the most widely used media when people were outside the home during leisure time. The use of traditional media was rather low. Tabloid press, radio and the print version of the regional newspapers were the most frequently used forms of traditional media in this use context. The use was almost non-existent for online sites of magazines, and it was low in regards to the digital replica of regional newspapers, freely distributed newspapers, the mobile version of the regional newspaper, blogs, television and television through the Internet.

**Figure 10. Media use outside home during leisure time (N=903).**

Media use is most intensive at home in the evening (Figure 11). The most used media are television (85%) and Google (75%). Just over half of the people use social media in the evening at home (51%), and the use of freely distributed newspapers was also clearly concentrated in evening use (45%). Of all media using motivations, news emphasis was also dominant in the evening, with 73% of people saying that their motivation for using media at home in the evening was to be aware of news events. In addition, the entertainment function of media increased in the evening. Besides news, people's media use was guided by the need to relax (55%) and to pass the time (46%).



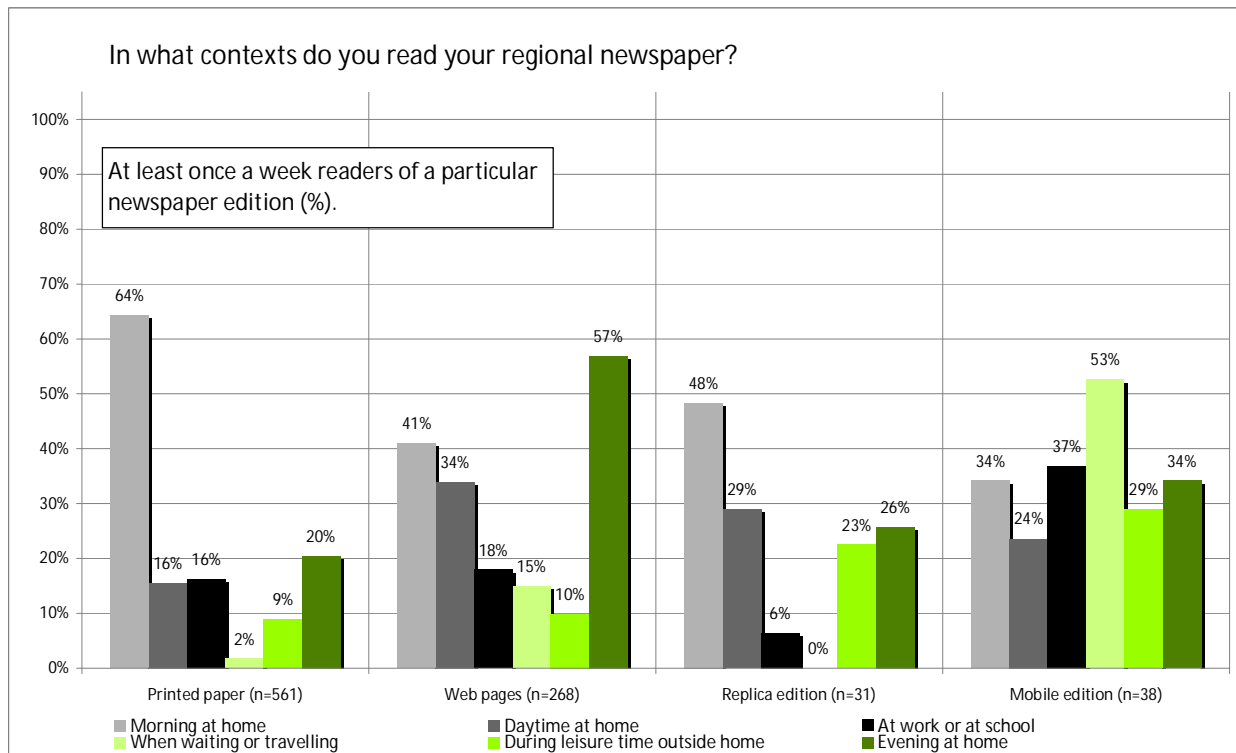
**Figure 11. Media use at home in the evening (N=903).**

## 5.2.2 Media profiles according to the use context

Above, we have analysed media use according to the use context, especially the time of the day and according to using motivations. The above results represent the user shares in the total sample (N= 903). Next, we will look more closely how the use of particular media is distributed across different phases of the day. This analysis is based only on the answers of those respondents who said that they use a particular medium at least once weekly.

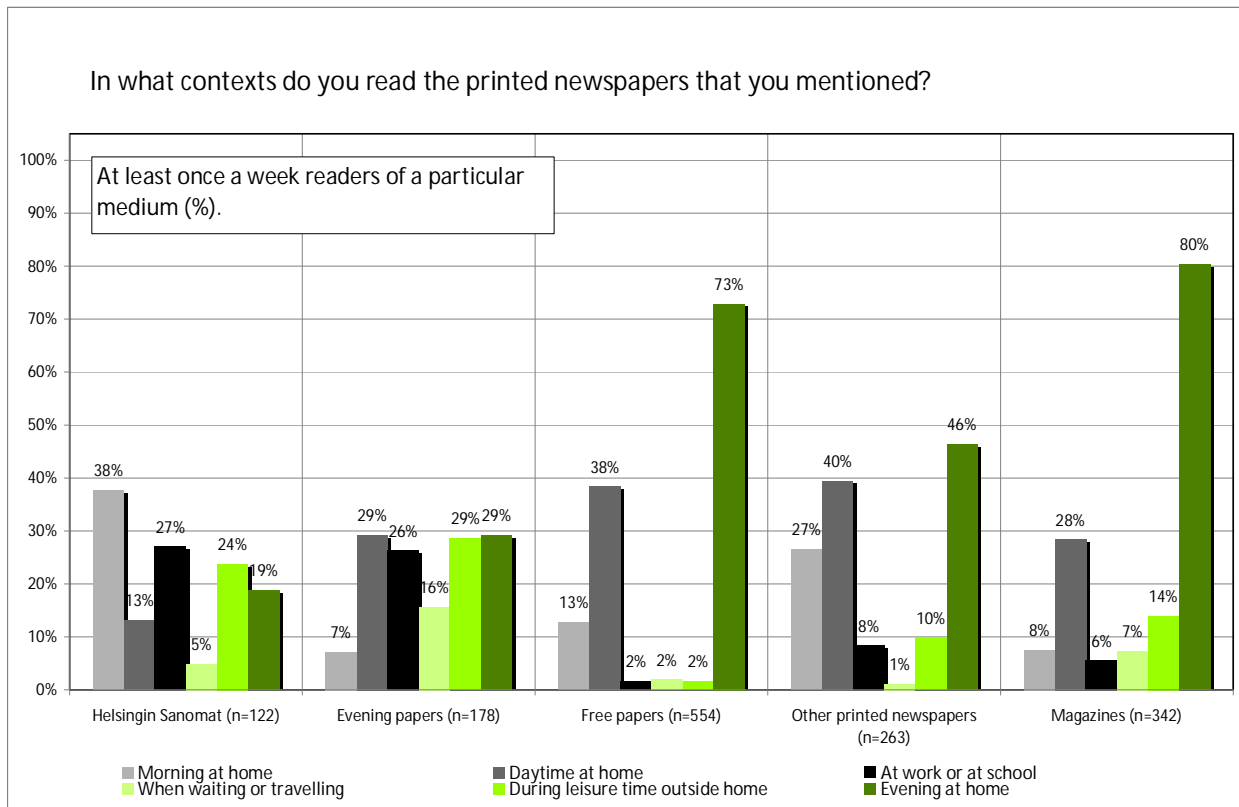
From Figure 12, we can see that the use of the regional newspaper's print version and digital replica is heavily connected to people's daily routines at home. They are most often used in the morning. Use of the web version of a newspaper often takes place in the evening at home, and the use of the mobile edition is typical when people are waiting or on the move. The interface of mobile version fits easily to these situations where it is needed to quickly glance the latest content. Conversely, the printed and replica editions of regional newspapers are almost never used when waiting or travelling.

**Figure 12. The use of regional newspapers in different contexts.**



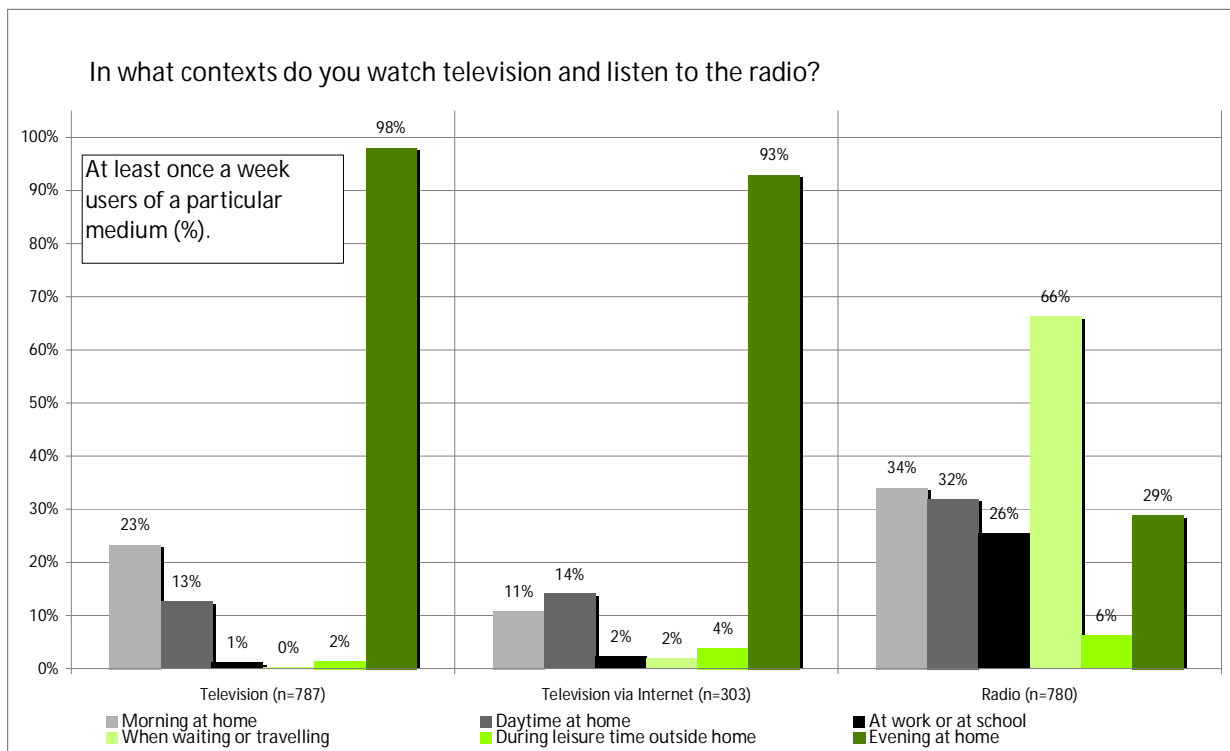
When paying attention to the use of the other printed newspapers and magazines, we can see (Figure 13) that most of these are typically read at home. The use of freely distributed newspapers and magazines is largely focused at home and usually takes place in the evenings. However, *Helsingin Sanomat* and the tabloid press were the exceptions, as they were used outside the home, typically at school, at work or during leisure time outside the home.

**Figure 13. The use of other printed papers in different contexts.**



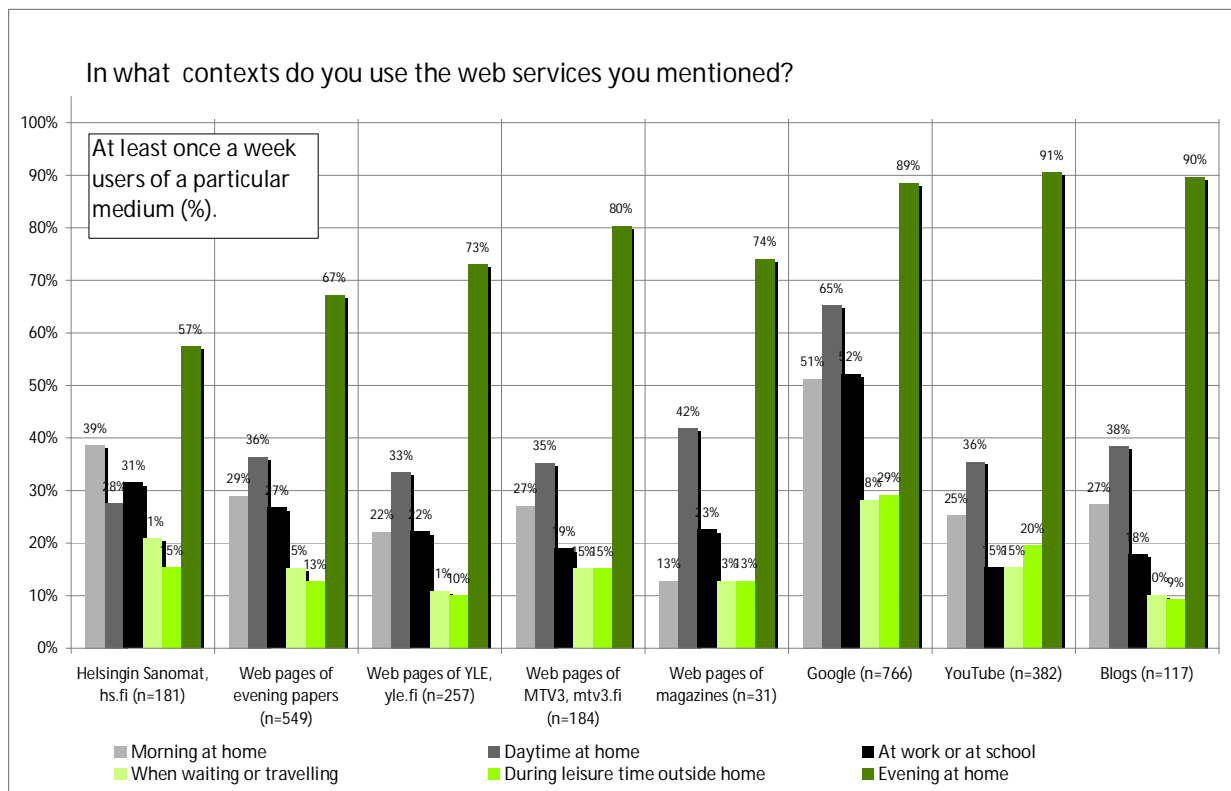
The traditional electronic media, television and radio have different profiles for contextual uses (Figure 14). The people who watch television weekly, usually watch it at home in the evenings (98%). Television via the Internet is also watched to a great extent at that time (93%). The use of television seems to be heavily connected to evening routines, which mirrors the use of regional newspaper in the mornings. Radio use is more diverse, as it takes place at different stages of the day. The radio is most often listened to when people are waiting or when they are on the move (66%). Only during leisure time outside home is the use of the radio rather minimal (6%).

**Figure 14. The use of television and radio in different contexts.**



When looking the variation between different online media sites (e.g. *hs.fi*, *yle.fi*, *mtv3.fi*, Google, YouTube, blogs and online sites of tabloid press and magazines), we can see, to a great extent, that use is concentrated in the home in the evenings (Figure 15). However, the online sites were also used at home in the morning or during the day, in the workplace or at school. Google was particularly used at home during the day and at school or workplaces. The online version of *Helsingin Sanomat* (*hs.fi*) was often used at school or in the workplace in addition to at home use.

**Figure 15. The use of online media sites in different contexts.**



The results that we have discussed in this chapter illustrate that the people’s media use varies greatly depending on the daily context. The printed newspaper plays a prominent role in people’s morning routines, whereas online media dominates during the daytime. Media use is most intensive in the evening, and the dominant media at that time is television. The prominent role that Google plays in most daily contexts is perhaps the most striking finding. In many daily contexts, it is the most used media; in all the contexts, it is among the three most popular. However, Google is not totally comparable with other media in that it does not have media content of its own. Instead, it is a tool for finding the content of the other media.

These findings are in line with earlier results from Kiviluoto et al. (2012) in that the use of social media, online music and browsing during daytime is immanent. Our finding on the use of Google and social media confirms this. Kiviluoto et al. (2012) also noticed that news media usage was heavy in the morning. Our study also indicates that the need to be aware of news events is an important motivation in the evening and, to some degree, throughout the day.

Our findings on the motivations for media use confirm the findings of Koivisto et al. (2012, 15) that the motivations for media use depend on the particular context and practice. Some people have different motivations for media use in different contexts. Koivisto et al. (2012) say that the reason why people engage in different entertainment media practices results from two distinct drivers: (1) the entertainment function, which includes humour and detachment from the everyday life, and (2) the social interaction function. In addition, our study highlights how important it is for most people to keep track of the news and that media use is often habitual. This is in line with the findings of Harju and Vehmas (2012, 11–12) who found news addicts in their media diary study. For these people, it is very important to know what is happening in the world all the time. In their study – as well as in the study of ours – there were also non-news users.

The habitual character of media use is acknowledged in audience research. Ritualistic practices develop in teenagers within the family, and this kind of habitual use has been noticed to continue when people grow older (e.g. Harju & Vehmas 2012; Uusitalo et al. 2011). The habitual use of media is apparent irrespective of what age group the person belongs to. Although media use of the young is often illustrated as multiple, creative and innovative, Herkman and Vainikka (2012) point out that it is still important to acknowledge that the young people's media use also repeats daily routines.

The rituals of media consumption have been identified to provide a sense of security for consumers. Kiviluoto et al. (2012, 22), for example, argue that with media consumption rituals people 'defend successfully the persistent and chaotic fear of remaining alone as outsiders of the community, especially in the fragmented modern era where people might feel themselves even more defenceless and insecure than before'. However, they also emphasise that in the changing media environment, media routines are transforming. For example, reading the newest tweets on Twitter may become a routine that replaces reading the printed newspaper at the breakfast table. In addition, routines have started to exist for ever shorter time periods, i.e. when people are going to school, have lunch breaks, are on the move, etc. Kiviluoto et al. (2012, 42) also noted that these routines are often subconscious, and people do not necessarily acknowledge them as routines in their daily lives. In our study, the heavy use of Google and social media during the day is an example of these kinds of transforming routines that fill even the short time periods in a day.

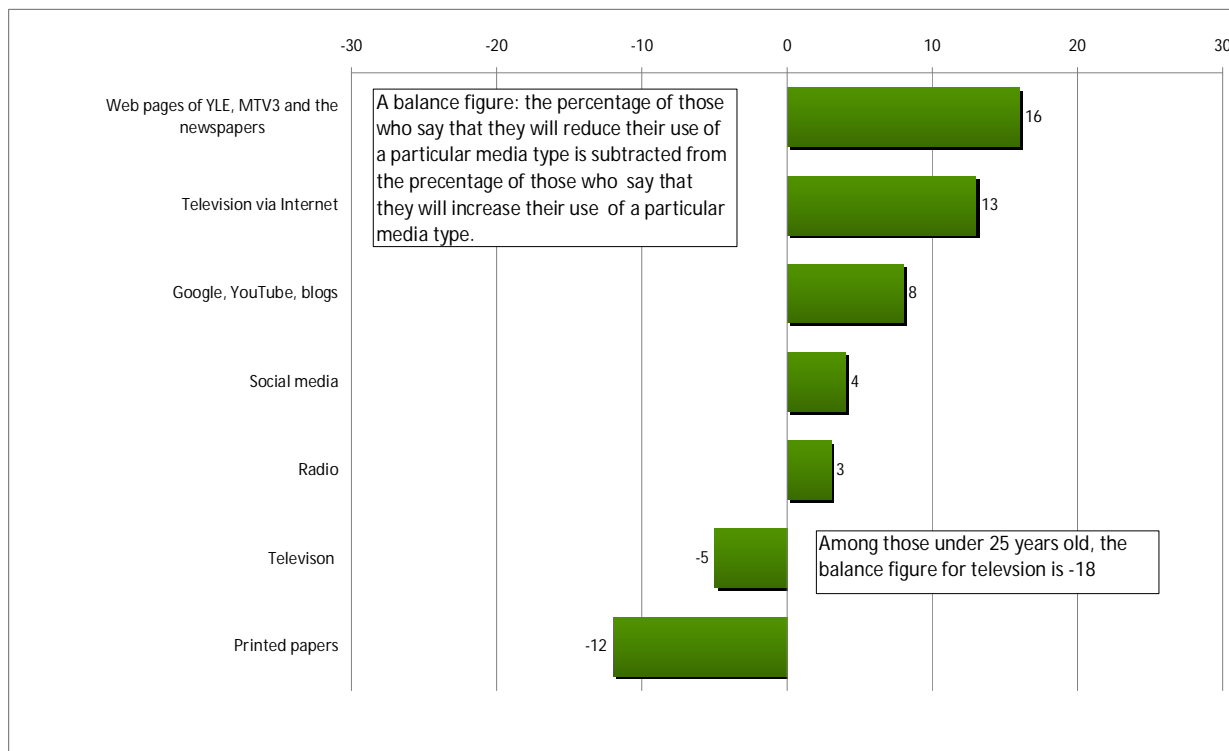
### 5.3 Future intentions in media use

This far we have discussed media use from the point of view of the audience's used time, use contexts and using motivations. In addition, we also wanted to discover how the audience's media use would look in the near future. As part of their overall media consumption, regional audiences were asked to evaluate their media consumption within a year, especially whether they see their media use increasing or decreasing.

According to the results (Figure 16), the use of online media, such as online newspapers/magazines and the websites of YLE and MTV3, will increase notably as will watching television through the Internet. Instead, the use of traditional media, especially print newspapers and traditional television, was predicted to decrease. This is in line with the recent survey by YLE and Taloustutkimus in which the majority (41%) of people who do not subscribe to a newspaper had once subscribed. A reason for the decrease was given as increased subscription fees or that people did not have time to read the paper (Yleisradio 2013).

The percentages in Figure 3.16 were calculated by deducting those who predicted their media use would decrease from those who predicted their media use would grow. These percentages are called 'balance figures'.

**Figure 16. The alleged change in media use during the forthcoming year (N=903).**



The results presented in Figure 16 support the assumption made about the increasing consumption of online media, such as online newspapers (e.g. Harju & Vehmas 2012; Statistics Finland 2012). The consumption of online news media is growing, and one trigger for this is the increased use of mobile devices, smart phones and tablets. The increasing use of online media can be seen, e.g. in Internet use via smartphones that was relatively high in our study—52% of the people who use the Internet access it with smartphones. Among the younger age groups (under 45 years), Internet use with smartphones is particularly popular. Accessing the Internet with tablet computers was surprisingly high in this study, as 21% of participants who use the Internet access it using a tablet. The increasing success of online media may partly derive from the usability of mobile media technology, especially tablets or smartphones; this supports the adoption of online media services as part of media consumption at different stages of the day, regardless of location.



In all the age groups, the alleged changes in media use were quite similar. Even in the older age groups, many of the respondents said they will reduce their reading of printed newspapers and watching television and increase their media use via Internet. Regarding printed newspapers, the variation from the average in each age group was no more than –2 percentage points. Regarding television, the variation were somewhat greater, 4 percentage points in the two oldest age groups (55 years or older). However, there were some more noticeable differences. In the youngest age group (under 25 years), the balance figure for the television viewing during the forthcoming year was -18 while the average was only -5. In the oldest age group (65 years or older), the balance figure for television via Internet was only 7 while on the average it was 13. The members in the oldest group often said that they will increase listening to the radio (balance figure was 9, compared to the average of 3). This may be because people in that age group are retiring from working life, and this is a kind of change in their overall routines that will probably offer time for radio listening (see Harju & Vehmas 2012).

#### 5.4 Discussing and sharing the media content

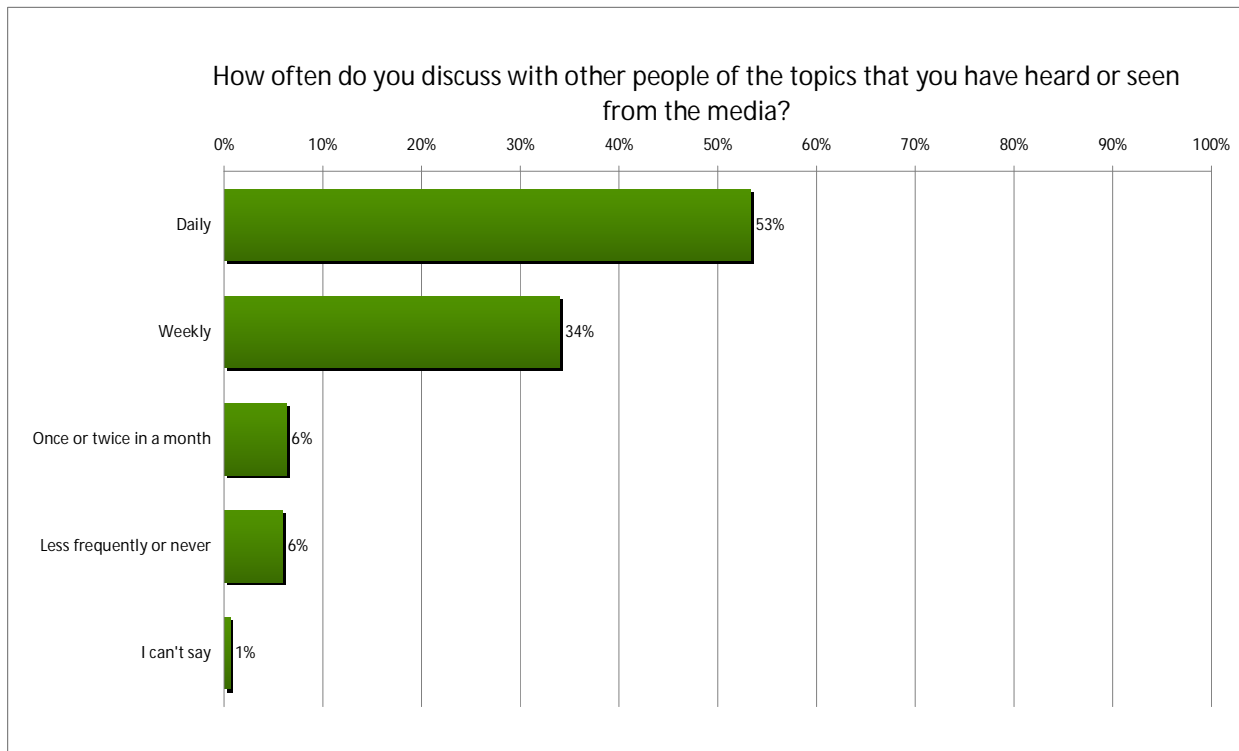
Research has shown that often the main driver for using traditional media is either a routine, as we have discussed previously, or familiarity with a particular medium (see Matikainen 2009, 39). For instance, the print newspaper has been an inseparable part of the Finnish breakfast table for a long time. However, drivers for media use, such as routines or familiarity with a certain medium, are also diversifying. The rapid increase of social media has changed the way we consume media and the drivers that encourage us to use a particular medium. For example, social media has initiated a practice of sharing and discussing media content within online social networks. This has offered a new option for social interaction in addition to previous face-to-face contact.

Harju and Vehmas (2012) emphasise that in a situation in which almost everything can be shared online, people make conscious choices whether or not to share news content. They consider what to pass along, in what form, to whom, and on which forum. Despite the enormous potential of social media for sharing news content, Harju and Vehmas (2012) noticed that to a great extent people still tend to share and discuss media in face-to-face situations. Although people often face news that is shared by others, they do not usually

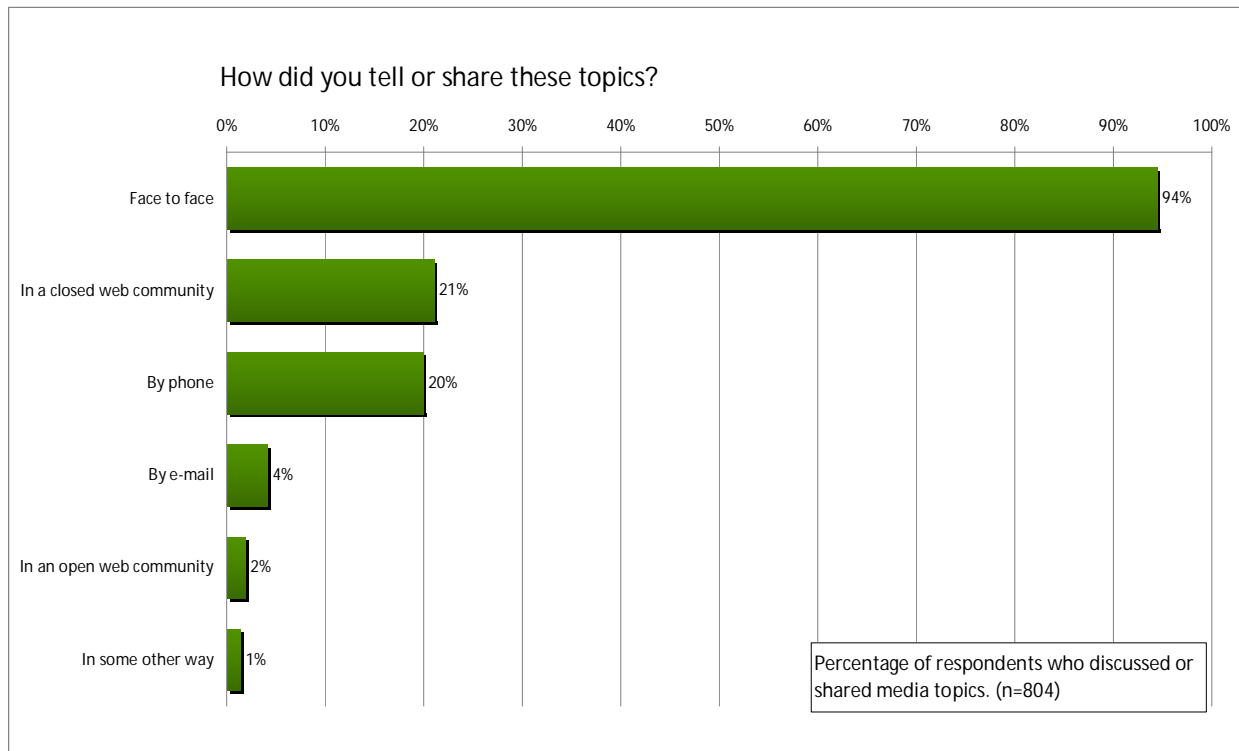
utilise social media to share news pieces themselves. Similar findings were also reported in the study of Heikkilä et al. (2012) who studied the media use practices of several focus groups. They also discovered the important role of face-to-face social networks as forums for discussing topical issues. The networks that have strong social ties, such as family, relatives and friends, are often the groups in which people tend to talk about timely issues. These results indicate that although the current media environment is characterised by transforming media technologies, the social context of media use remains an important factor that has an effect on how relevant different media and content are perceived. The media seem to be an initiator that generates discussion that happens in local social networks by providing topics and information that people can share in their various social networks (Heikkilä et al. 2012).

Both of the studies mentioned above (Harju & Vehmas; Heikkilä et al.) were based on qualitative analysis with only few respondents. Their results cannot be statistically generalised into the population at large. In our study, we tested these results within a statistically valid survey setting and found quite similar results. Media content, such as the latest news or interesting topics, seem to be an important source for social interaction, as almost 90% of our respondents discuss media content or share content every week with other people (Figure 17). Over 50% of respondents do this daily. Much of this interaction happens face-to-face (over 90% of the discussions; see Figure 18), and the Internet is not used that often. On the Internet, it is more typical to discuss or share media topics in a restricted online community (21%) than in an online community that is open to all (2%). The phone (20%) is also an often used channel to discuss or share topics.

**Figure 17. Sharing and discussing media topics (N=903).**

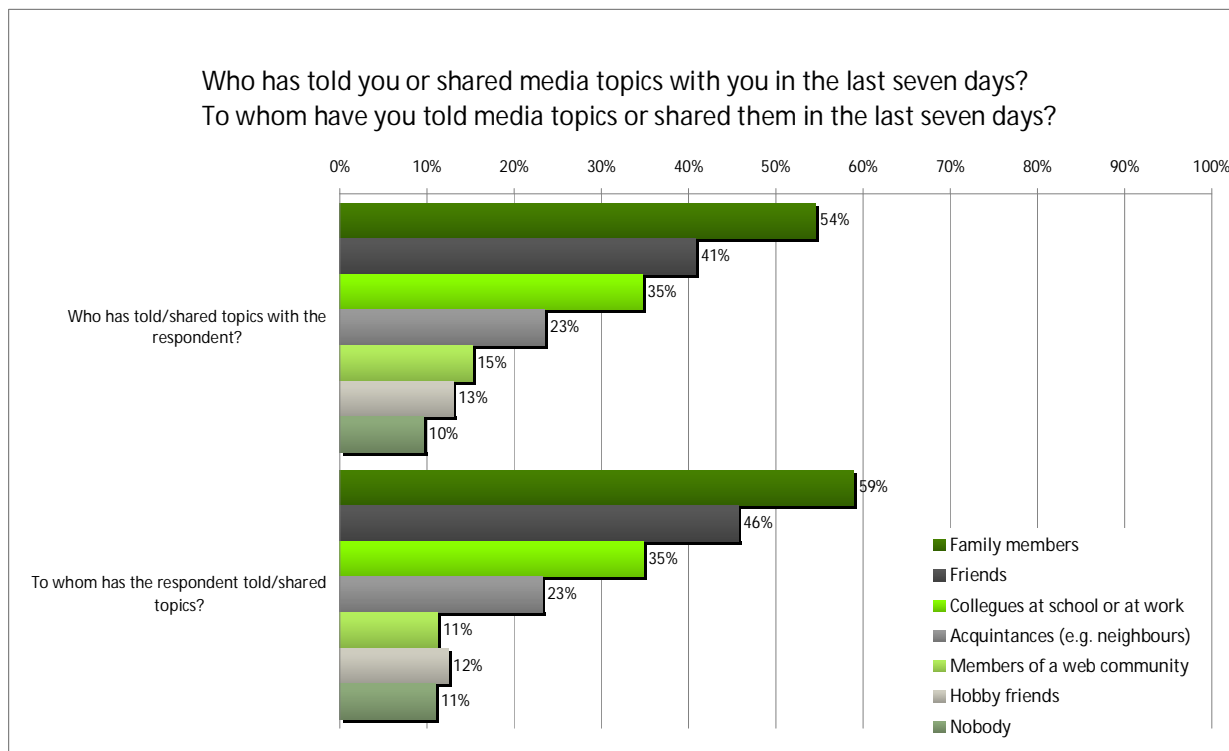


**Figure 18. Channels for sharing and discussing media topics (N=804).**



In addition to knowing how often and in what way people share media content, we wanted to know with whom people talk and share media content. The most common social groups were family and friends: 54% of respondents heard and received media content from family and 41% from friends (Figure 19). Interestingly, members of online communities and people with whom respondents practice their hobbies were unlikely groups for discussing media topics.

**Figure 19. Partners in sharing and discussing media topics (N=903).**

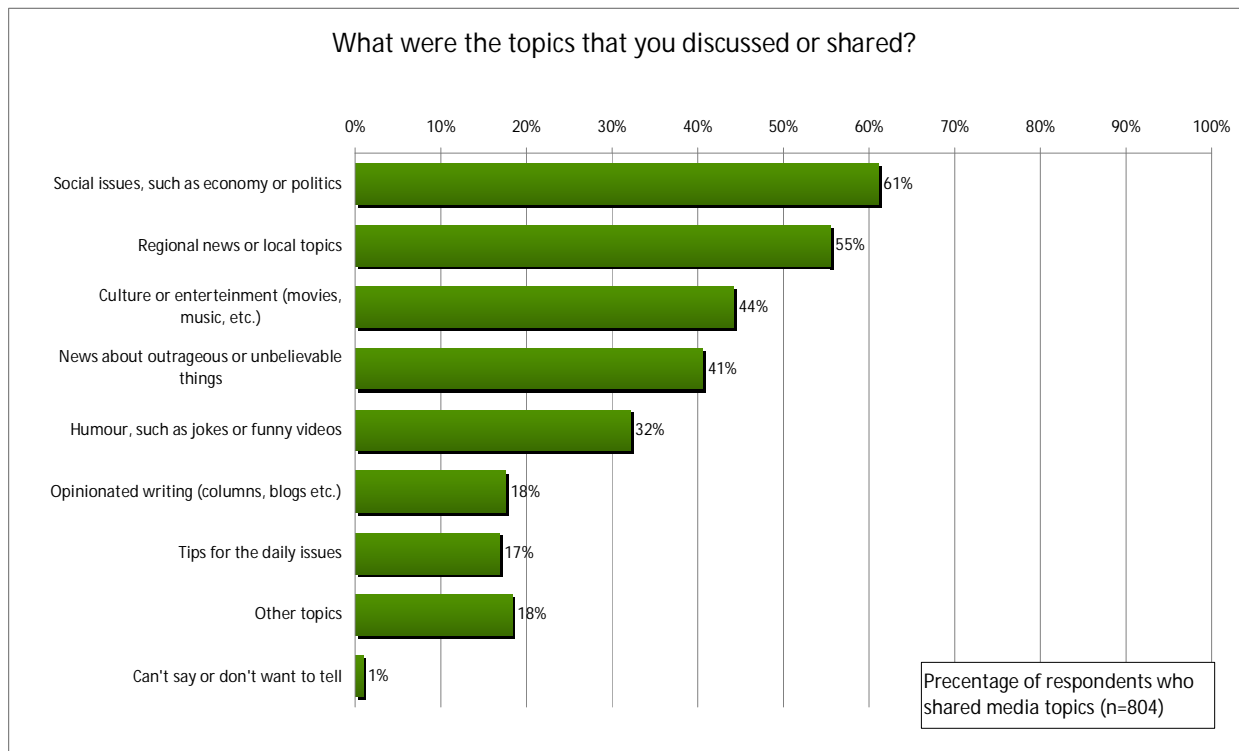


The most popular topics that people share or discuss are connected to societal issues, such as politics or economy (Figure 20). These topics were shared or discussed by 61% of those who had shared or discussed some topics. Respectively, 55% of them shared or discussed regional news or local topics. The emphasis on sharing and discussing the local news points to the importance of local surroundings for people. The proximity of regional and local news for the regional audience probably makes the news interesting and meaningful for sharing with a close network of family and friends (see Heikkilä et al. 2012). Surprisingly, news, which contained an unbelievable or outrageous aspect, or humorous stories, such as jokes or funny videos, were not at the top of the list. Instead, the societal and regional aspect seemed to form the basis for discussions generated by content provided by the media.

These findings are somewhat contradictory to the common belief that people are mostly interested in light entertainment issues, celebrities, etc. These may rank high when counting clicks, but according to our results and the results of some other recent audience studies (see Heikkilä et al. 2012; Mäkinen 2013), people at least say that societal and political issues are

the content that they want from their media. In our survey, even within the youngest age group (under 25 years), societal issues like the economy or politics were the most discussed and shared media topics. About half of the youngest age group said that they shared or discussed social topics. Nearly as many in this group had also shared or discussed topics related to culture or entertainment, regional issues or humour.

**Figure 20. The types of media topics that respondents shared or discussed (N=804).**



Our findings are in line with previous studies that pointed out that people tend to share and discuss big news events and political news in their social networks. For example, according to Harju and Vehmas (2012) people tend to either discuss issues face-to-face or use Facebook for media-related discussions. However, there seems to be variation in which social group are regarded as suitable for discussing topical issues, such as politics. Harju and Vehmas (2012) noticed that political news was more often shared and discussed with family and friends than in the workplace or at public online communities. Heikkilä et al. (2012), for their part, noticed that workplaces tend to divide people, as some working environments encouraged discussions between people, but others tended to restrict the expression of employees views. Following the previous studies, trust is an important factor that has a crucial role in the way people share and discuss media content in peer groups. This seems to be the case particularly when

discussing sensitive and contradictory topics that may elicit strong reactions. For example, a recent study by Pöyhtäri et al. (2013) discovered that aggressive discussion in the media may stifle public debate and narrow topics for public discussion. Whether people feel their social networks are trustworthy and reliable enough to share and discuss delicate or provocative media content is a perspective that should be acknowledged when analysing the practices of sharing and discussing.

Koivisto et al. (2012) noticed that people's media use practices are influenced by the way in which their social network engages in the media. According to them, when the main driver for the consumption of entertainment media is social integration, the activity of the social network generates a need to use media. Koivisto et al. (2012, 15–16) argue that people engage in specific media use practices because others have similar media practices. The aim is to be part of a group, take part in its activity and avoid being left out: 'Also, it's about defining one's role and status in a group. The one who shows the funniest YouTube videos or knows the latest hit songs is the one who gets the admiration from others and climbs the ladders of social respect'. Following that argument, and consistent with the findings of this study, it can be argued that the social network has an important influence on the way people use media, on the decisions people make about whether to share specific content or not and on what topics would be interesting enough to start a discussion within their social network.

## 5.5 User profiles in media use

In the analysis of quantitative data of media use, it is customary to compare groups of respondents according to their age, sex and other demographics. Although media use in each demographic group has some commonalities, the demographics don't explain all the variations in the data. Media habits are also related to people's personal traits or to their micro-cultural environment, and these cannot be captured in an analysis that is based on demographics.

In this chapter, we try to build different profiles of media use starting not from demographics but from the variables describing the media use itself. We use statistical multivariate methods to find different user types or profiles that are mixed in the total distributions and split and lost in demographic groupings by age, sex, etc. In a profiling analysis, the demographics are

used only after user types have first been created. They are used to describe how profile groups are represented in each demographic group.<sup>4</sup>

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We will first look to see if we can find profile-groups that are aligned to use certain media more than others. We look for synergies between different media and try to identify, e.g. if the heavy users of social media use more Google and YouTube than the heavy users of printed newspapers. Second, we will look at user profiles according to the self-reported motivations for using media in different contexts in a day, e.g. whether there are groups that use media for keeping aware of news events constantly through the day or whether there are groups that use media for different purposes in different contexts in a day. Third, we find out how the profiles created are related to demographic variables like sex and age and how the two sets of profiles (media use profiles and using motivation profiles) may be related. For example, we will look at whether people representing the profile of heavy social media use are more aligned to profiles that stress heavy news orientation or profiles that stress relaxing and habitual media use.

Profiling using multivariate methods have been used in surveys describing people's lifestyles or values. The RISC Monitor is an example of this. Some profiling has also been done in the analysis of digital user data, e.g. profiling analysis of log files have been used for personalising media content according to users' previous media use. However, surveys of media use have typically been analysed only using demographic variables. We believe that multivariate profiling is also useful when analysing the survey data of media use.

### **5.5.1 'Traditional users' and 'digital users'**

Our first user profiles are based on how much people use time with each media in a week. The profiles were created by cluster analysis (centroid based clustering, k-means clustering). The respondents were divided into homogeneous groups (according to their weekly use of different media types) to maximise the difference between the groups. The clearest solution for interpretation was to divide respondents into two groups: traditional users (55% of respondents) and digital users (45% of respondents).

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<sup>4</sup> It would also be possible to describe how each profile group is composed demographically.



From Figure 21, we can see that the traditional users typically consume regional print newspapers, freely distributed newspapers, television, newspapers other than the regional paper, magazines and radio. The media consumption of the user profile group that we call digital users is heavily characterised by the use of online digital media, especially the use of social media and blogs, YouTube, other online services of journalistic media, television through the Internet, online versions of regional newspapers (web-edition, digital replica, mobile edition) and Google. The figure illustrates that digital users rarely consume the print version of the regional newspaper, freely distributed newspapers or traditional television.

**Figure 21. The profiles of traditional users and digital users (N=903).**

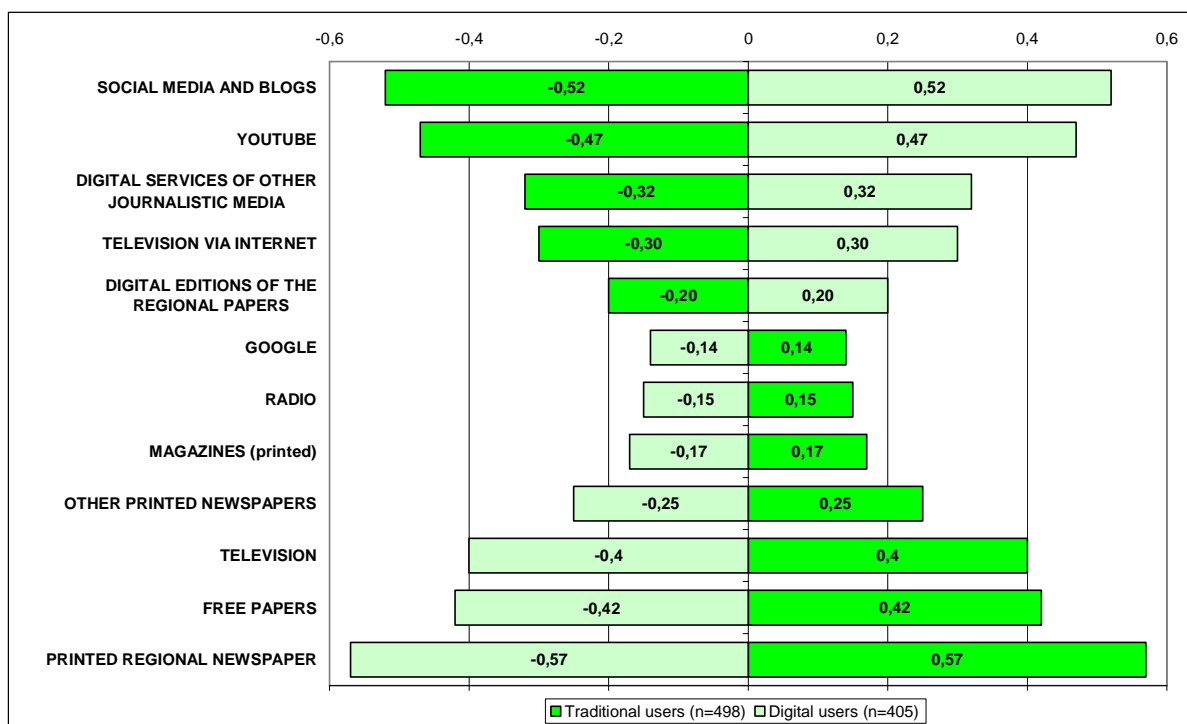


Figure 21 also reveals that the printed newspapers and freely distributed papers (typical only for traditional users) as well as social media, blogs and YouTube (typical only for digital users) are the media that most efficiently divide respondents according to different user profiles. Meanwhile, the profile groups do not differ that much in terms of using magazines, radio, Google or the different digital editions of the regional newspaper.

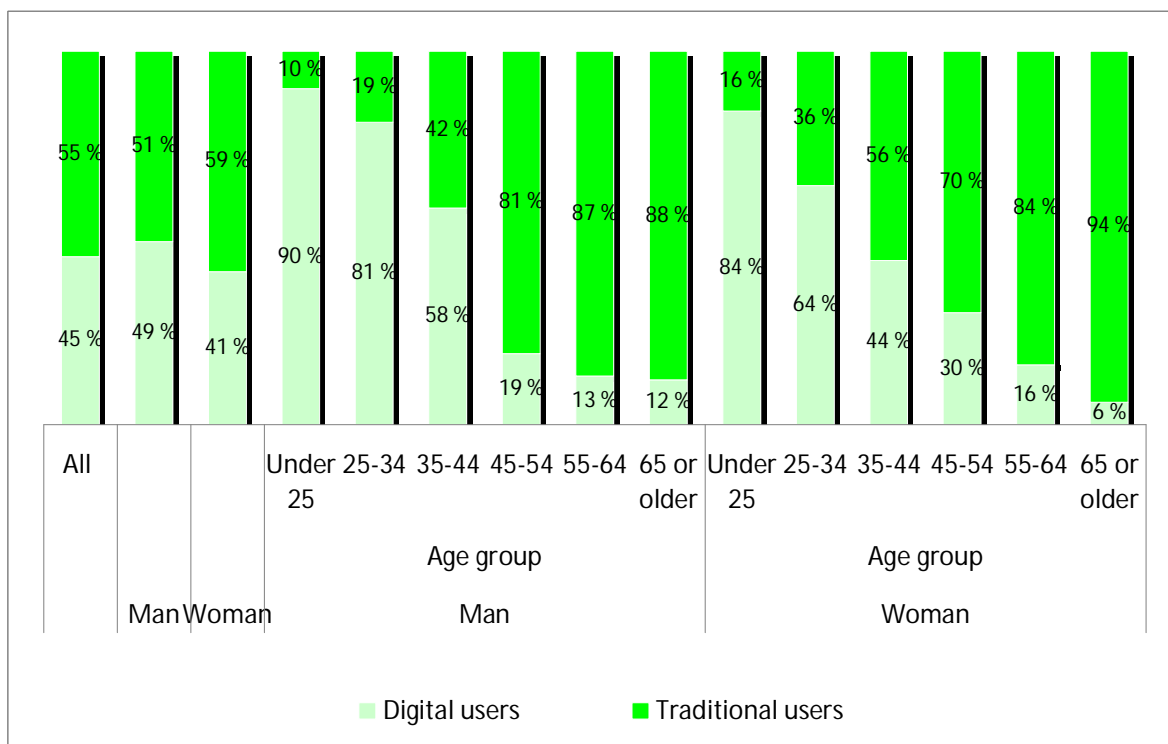
After the profiles of traditional users and digital users are created, they can be analysed using the demographic data (see Figure 22). The age seem to be the most effective factor here: the

younger the respondent is, the more likely it is that he or she belongs to the profile of digital users. This is expected. The young generation has been labelled as a ubiquitous or mobile generation because the media and media technology are present everywhere in their daily lives and are part of their various daily practices (Herkman & Vainikka 2012; Matikainen 2011). Currently, media use is enhanced by an endless variety and supply of different media products; in earlier times, the media was dominated by only few actors that broadcast or distributed content. The differences between age groups are already widely noticed, e.g. the young watch television less than the middle aged or aged (Statistics Finland 2012, 132).

Given that generally the younger generations use media less than the older generations, it is a little surprising that the overall time used for the media is clearly greater among the digital users than the traditional users. On average, digital users consumes media daily six hours and five minutes a day, while the average using time for traditional users is five hours and 31 minutes. Maybe those of the young that consume media only little have been positioned in the analysis to the traditional profile.

For men the share of traditional users exceeds the share of digital users when they turn 45. The change is drastic. Of the male respondents aged 35–44, the proportion of digital users is 58%; among males aged 45–54 years the number is only 19%. Among women, the proportion of digital users decreases more consistently by the age: from 84% in the under 25-year-olds to 6% of the over 65-year-olds.

**Figure 22. The traditional users and the digital users by gender and age (N=903).**



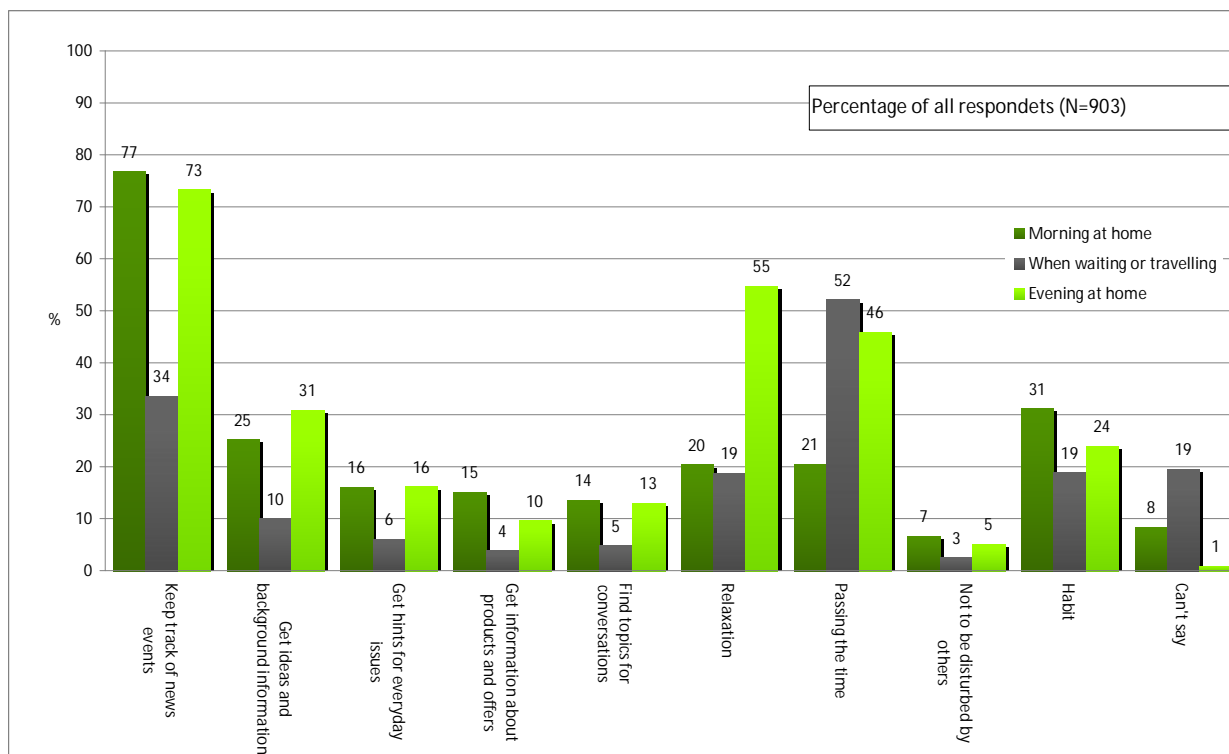
The profiles of digital users and traditional users are connected to vocation. In addition to the young, the students are often digital users. Of course, many digital users are both young and students. Correspondingly, in addition to the middle-aged and the aged, the retired and people taking care of their children are often traditional users. Of course, most of the retired are also aged. There are also some differences in the proportion of user profiles in the regions: the share of digital users is highest in the Oulu region (53%), slightly smaller in the Tampere region (45%) and lowest in the Jyväskylä region (37%).

### 5.5.2 The ‘news oriented’, ‘habitual time passers’ and ‘multi-purpose users’

In addition to the profiles of traditional users and digital users, we also created user profiles according to the motivations given for media use in three contexts: at home in the morning, when waiting or travelling, and at home in the evening. As already noted in Chapter 3.2 and as seen in Figure 3.23, the motivation for media use in each of these contexts differs greatly.

In the morning, news orientation dominates. When waiting or travelling, passing the time is the main motivation. In the evening, news orientation dominates, but relaxing and passing the time are frequently named motivations.

**Figure 23. The using motivations of the media in three different contexts (N=903).**



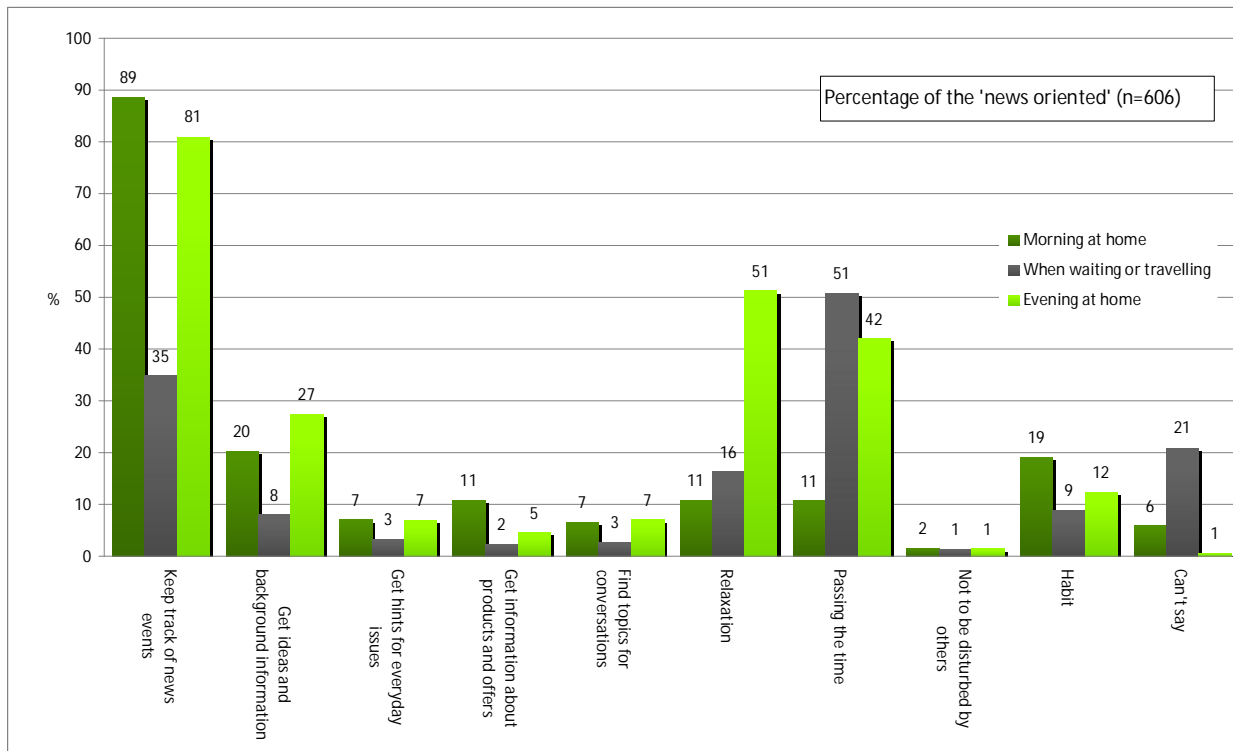
In the questionnaire, nine options were listed as important motivations for media use in each using context. In addition, ‘I can’t say’ was an option. The respondents were advised to choose all the motivations that applied. In the data, this comprised 10 dichotomous variables for each of the three contexts (morning, travelling, evening). Latent class analysis (LCA) was chosen as a multivariate method for creating profiles.<sup>5</sup> It was chosen because it is based on probability calculations and is thus suitable for analysing qualitative variables. It produces the latent classes (profiles, variables, factors) and gives each respondent the probability of belonging to each class. Each respondent can then be deposited to the class (or profile) to which he or she most likely belongs.

<sup>5</sup> The LCA iterates the data until the variables in each class (profile) are statistically as unrelated as possible. In other words, LCA constructs the classes so that they will be inherently as homogeneous as possible. For more about latent class analysis, see Reunanen 2003, 583–598; McCutcheon 1987)

The LCA was conducted in several phases. First, the profiles were constructed separately for each of the three contexts. Then, for each of the contexts, a new variable was created in which each respondent was connected to the profile to which he or she most likely belonged. Then a second LCA was conducted for these three variables. This LCA produced three profiles and a new variable was created in which each respondent was connected to the profile to which he or she most likely belonged. This variable was cross-tabulated with the original three sets of dichotomy variables about motivations for using media (1) in the morning at home, (2) when waiting or travelling and (3) in the evening at home. The profiles were named according to the distributions of the original motivation-variables in the cross-tabulations. In this version of LCA, the profiles consist of real groups of respondents and the real distributions of their answers to the survey questions.

The first profile was named 'news oriented', and it represented 67% of the respondents. Figure 24 shows that the profile resembles much of the total distribution of all the respondents (Figure 23). News orientation dominates both in the morning and in the evening. In the evening, half of the news oriented also says that relaxing is an important motivation for media use. When travelling, the most common reason for media use is passing the time; this was also mentioned by half of the respondents in this profile.

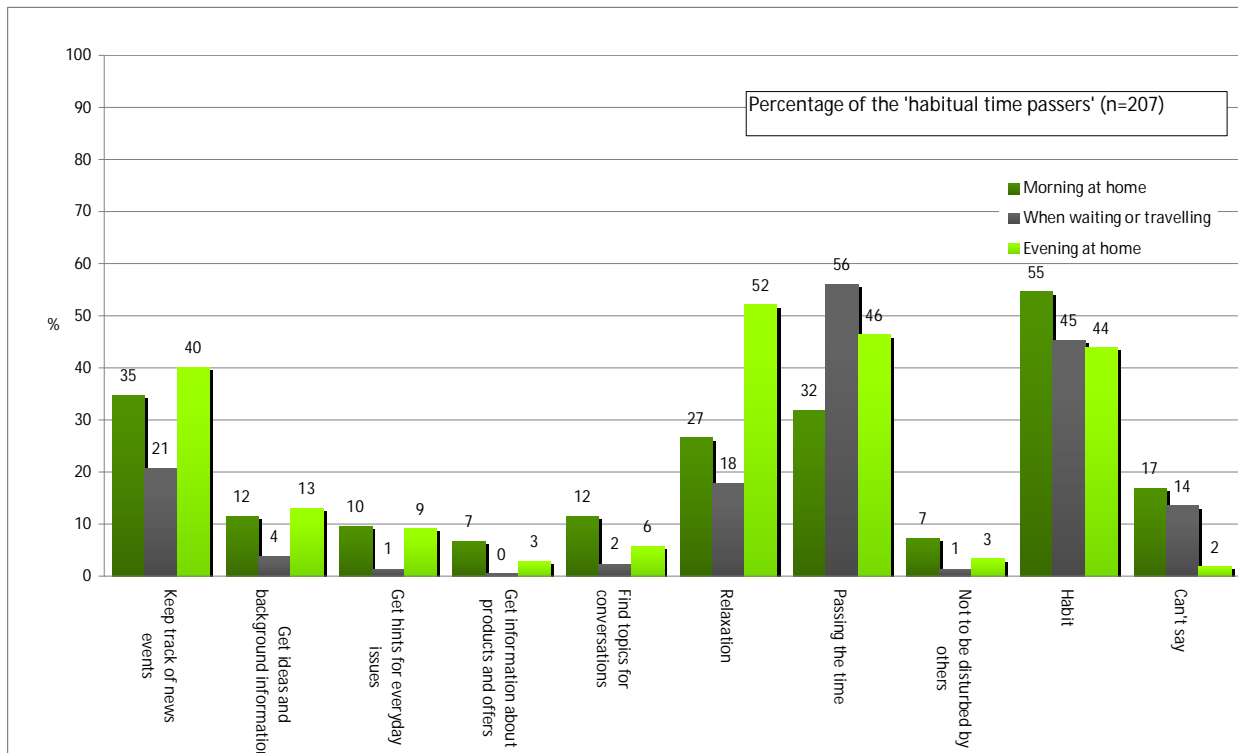
**Figure 24. The news oriented profile (67% of the respondents).**



The second profile was called ‘habitual time passers’ because they often said that they use the media to pass the time or because it is a habit (Figure 25). Of the respondents, 23% belong to this profile group, and this profile also differs more clearly from the average. The habit was often named motivation for media use in the morning (55% named this motivation), when waiting or travelling (45%) or in the evening (44%). Passing the time was another dominant motivation within this profile. One third of this group said it is an important motivation for media use even in the morning. When travelling and in the evening, it was an even more common motivation.

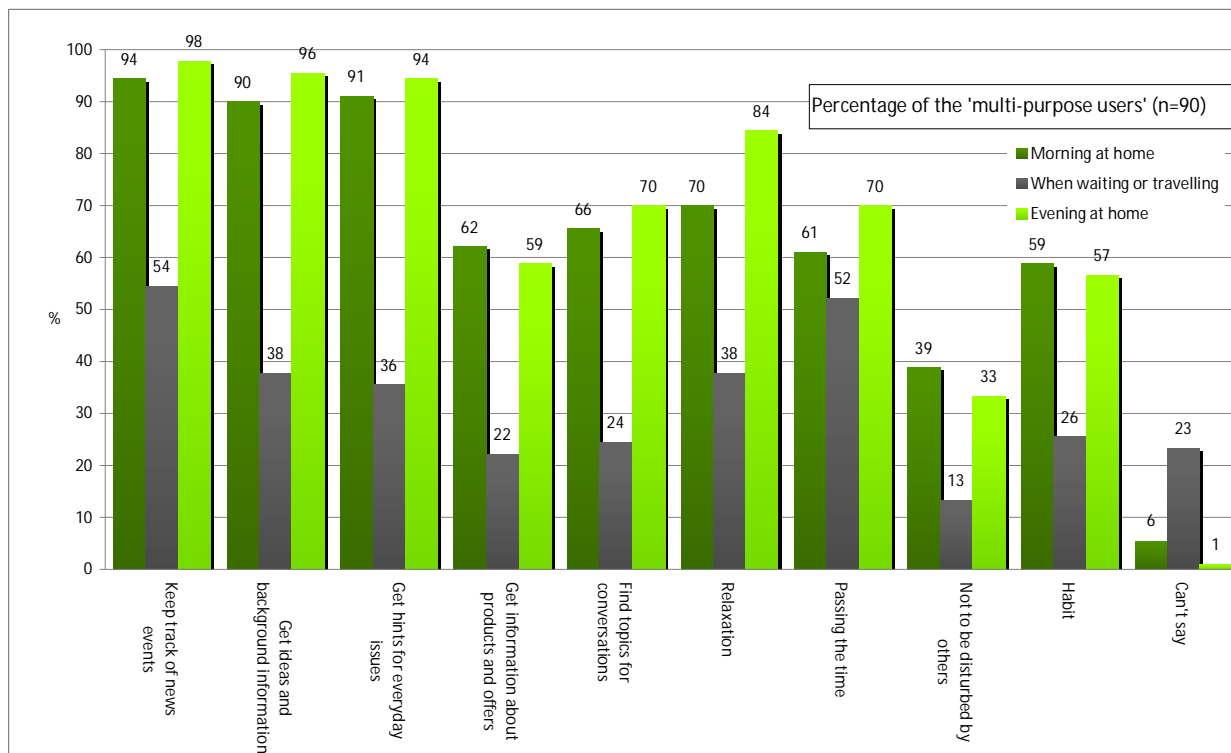
Of the three profiles created with LCA, the habitual time passers probably is the most interesting. People representing this profile differ clearly from the news oriented majority in that their media use is less utilitarian and intended more for enjoyment.

**Figure 25. Habitual time passers (23% of the respondents).**



The third profile-group was called ‘multi-purpose users’ because the members of this group frequently named most of the motivations listed (Figure 26). Of the respondents, 10% belongs to this group. Particularly at home in the morning and in the evening, most of the motivations listed were chosen. It is possible that people are grouped in this profile because of the way they understood and answered the motivation questions rather than due to their real motivations when using the media. It may have been difficult for them to identify some motivations as more important than others and therefore listed them all or most of them.

**Figure 26. Multi-purpose users (10% of the respondents).**



As was in the case with the digital users and traditional users, age groups also differed in regard to the using motivation profiles. The younger the respondent is the more likely he or she is to be represented by the habitual time passers profile and less by the two other profiles. The older the respondent is, the more likely he or she is to be represented by the profiles of the news oriented or the multi-purpose users.

**Table 1. Using motivation profiles according to the age of the respondents.**

	Under 25	25-34	35-44	45-54	55-64	65 or older	Grand Total	
	%	%	%	%	%	%	%	N
News oriented	62	61	62	67	73	81	67	606
Habitual time passers	32	30	29	19	17	7	23	207
Multipurpose-users	6	9	10	14	10	12	10	90
Grand Total (%)	100	100	100	100	100	100	100	
Grand Total (N)	128	202	157	130	150	136		903



The differences between genders were not very big. The male respondents were slightly more aligned to the news-oriented profile; among women, the share of habitual time passers and multi-purpose users was slightly higher. Of the regions, the Tampere area was most news oriented while Oulu's share of habitual time passers was greatest. The share of multipurpose-users was the same in all the three regions.

**Table 2. Using motivation profiles according to gender and region.**

	Man	Woman	Tampere	Jyväskylä	Oulu	Grand Total	
	%	%	%	%	%	%	N
News oriented	70	64	69	67	65	67	606
Habitual time passers	22	24	20	24	25	23	207
Multipurpose users	8	12	10	10	10	10	90
Grand Total (%)	100	100	100	100	100	100	
Grand Total (N)	451	452	301	301	301		903

When compared to the profiles of traditional users and digital users, it was revealed that the share of habitual time passers is greater with the digital users than with the traditional users. The proportions of the two other motivation profiles do not significantly differ.

**Table 3. Using motivation profiles according to media use profiles.**

	Digital users	Traditional users	Grand Total	
	%	%	%	N
News oriented	65	69	67	606
Habitual time passers	27	20	23	207
Multipurpose-users	8	11	10	90
Grand Total (%)	100	100	100	
Grand Total (N)	405	498		903

Despite the differences in the profiles, it is important to notice that the context affects using motivations similarly in each of the profiles: news orientation is important in the morning and in the evening while passing the time is important when travelling or waiting. Therefore, profiling has limits. Although the members of different profile groups place a different emphasis on their media use habits and motivations, their media use varies during the day. Additionally, people belonging different profile groups may also have a lot of similarities in their media use.

In this chapter, we created two different sets of user profiles that are not based on demographic variables. Instead, they are based on variables describing the media use itself. Based on how much time people spend with each medium every week, we composed two user profiles: traditional users and digital users. The media use of traditional users typically concentrates on print products, such as a regional print newspaper, freely distributed newspapers or magazines. The media use in the user profile group of digital users is highly focused on online digital media, such as social media and YouTube. The share of older users is greater within traditional users while the share of younger users is greater within the digital users. This is what could be expected on the findings of previous Finnish audience research (see Herkman & Vainikka 2012; Uusitalo et al. 2011).

We also created three user profiles based on variables describing motivations for media use in different contexts. The news oriented profile consisted of 67% of the respondents, and their motivations were quite similar to the average of the total group of respondents. The profile of habitual time passers consisted of 23% of the respondents and, instead of news events, members of this profile were mostly interested in passing time or relaxing or their media use was habitual. The profile of multi-purpose users comprised 10% of the respondents, and they usually felt that all the listed motivations often applied in their media use. Demographically, the older the respondent is the more likely it is that he or she belongs to the news oriented profile. The younger the respondent is the more likely it is that he or she belongs to the group of habitual time passers. It seems that media use is not a habit solely of the older age groups who are used to consuming traditional media, as habits and routines are also important among younger generations.

## **6 Conclusions**

In this report, we illustrated the development and piloting process of an audience research concept that provides information on the media use of regional audiences. To conclude, we shall first summarise how this survey concept contributes to the existing audience research surveys. Second, we shall scrutinise the results of the survey from the perspective of audience's media use and changing use patterns.

## 6.1 Reflections regarding the survey concept

The concept developed in this study is tailored according to the needs of regional media companies. For example, social media and online media, such as YouTube, were included in the media list because they are becoming increasingly important competitors for regional media companies in terms of audience preferences and advertising markets. Second, the decision to ask about the use of different media in a consistent way makes the results more comparable than if the data were collected from various sources. This comparability of different media further enables the acquisition of information on the relations and synergies among different media. This was accomplished by creating user profiles according to the time spent with each medium. In addition, the survey provides a fresh angle by including the contexts of media use. According to our understanding, existing quantitative audience research has not covered the contexts of the media use this far. This concept not only produces information on who the audiences are (demographics) but also provides data on the practices of audiences, especially what audiences do in what contexts (see also Heikkilä et al. 2012; Harju & Vehmas 2012).

Incorporating social interaction that is generated by media use and media contexts in the survey adds another dimension to existing survey formats. In the changing media environment, the practices of sharing and discussing the news provide interesting information on the role and use of media in the everyday lives of audiences.

The user profiles generated using multivariate methods effectively condense the results of the survey in a usable form and highlight similarities and differences that cannot be explained by demographics. In addition to the profiles designed, which are based on the time that the people use different media on a weekly basis, the concept also produces profiles based on motivations reported by respondents for media use in different contexts.

Furthermore, this concept accentuates the possibility of conducting the survey in specific regions, which makes it possible to obtain data on media use in the locations of particular regional media. This makes this concept especially useful for the regional media.

Overall, this survey concept contributes to audience research by developing quantitative tools for analysing the media use of regional audiences. For example, the social use of media has been a topic in qualitative audience research, but the survey method in this concept is utilised

as a tool to study and analyse the social practices that are connected to media use. If implemented every year, this survey would enable the gathering of longitudinal data and the tracking of central trends and changes in audience media use.

However, the survey introduced in this study is a pilot. Further development is needed, e.g. in the formulation of the survey questions. First, in its current form, the survey does not provide information on the parallel use of different media, which seems to be distinctive at least in the media use of the young. Second, at the moment, radio listening has only been asked about generally, but it is important to separate traditional radio and Internet radio use. In the case of television, this distinction has already been done.

In addition to the formulation of the survey questions, further consideration is needed to distinguish the central comparisons derived from the data. The multivariate analysis for user profiling can also be further developed.

When interpreting the results, one must keep in mind that the data is not based on objective measurement of media use. Instead, it is based on the images and estimates of the people themselves. This raises questions about how capable people are of evaluating their daily media use. For example, evaluating the time used for listening to radio may be easier than evaluating the time used to navigate online, such as using different online sites. How people understand and define the use of particular media can be considered, e.g. whether visiting the online site of a regional newspaper through a Facebook link from a friend counts as a use of that particular newspaper.

## 6.2 Reflections on the results of media use

One aim of this study was to scrutinise how media use differs in different contexts during the day. This aim is grounded in wide discussions of audience's changing positions. As research has suggested, audiencehood is not a permanent identity. Instead, it is constantly shifting. In addition to being receivers of media content, audiences have become active co-creators. Being part of an audience is now a much more active and interactive experience than it was the broadcasting era. (see Ross & Nightingale 2003; Rosen 2009; Gillmor 2004.) When acknowledging the audience's changing role, it is relevant to scrutinise the using motivations and contexts that affect greatly the ways media is consumed among different types of audiences.

The categorisation of audiences into particular target groups is common, especially in commercial audience research. In these categorisations, media users have been divided into different types of groups, such as young/old, men/women, creative/traditional, or to an audience whose consumption is guided by an entertainment function versus a political function etc. (see Heikkilä et al. 2012, 266). However, based on the findings of this study, we argue that there is a need to move forward from this kind of target group thinking. As the results have shown, media use varies with use contexts and depend on where and when people use media and on their motivations to use particular media in that particular situation. It is true that there are different media use patterns; their identification is one of the main tasks of this survey concept. However, when it comes to motivations for using media or preferences for media content, these patterns may be connected to specific using situations, such as daily contexts and social settings. For example, it is possible that one person is interested in political news in the morning at home but prefers action movies in the evening. Secondly, people belonging to different profile groups often have more similarities than differences. People are multifaceted, and their lives are not restricted to target groups. In this survey concept, the daily contexts have been taken into account when creating profiles based on motivations for media use.

The survey data points to the changing practices of media use, as the high use of Google in the morning (and throughout the day) illustrates. New practices are developing and partly replacing the traditional habits related to media use. However, according to the survey data, people's media use is still quite habitual, but habits are transforming, e.g. due to the diffusion of tablet computers and smartphones. The consumption of online media, especially Internet television and social media, are on the rise. However, news following seems to maintain its position as an important motivation for consuming media.

An important starting point for developing this research concept was a need for regionally specific information on media use. The pilot survey produced this kind of data from the regions of Oulu, Tampere and Jyväskylä. One interesting finding in this regard is the better reach of a regional newspaper's online edition in the area of Oulu when compared to the regions of Tampere and Jyväskylä.

What is typical for media use today is increased individual control over what media content is used and when. Initiated by increasing supply and easy access to online media, digital users

select the content they want to consume. In this study, this is portrayed by the high use of YouTube and the popularity of Internet television, which, according to the results, is predicted to increase in the near future. At the same time, people predict that their use of traditional television will probably decrease. The shift in the ways media is consumed has also been noticed by Koivisto et al. (2012, 22) who emphasise how social media changes the way traditional media is consumed. According to them, by consuming online content, people are beginning to gain more control over the content they use.

The results of this pilot survey raise questions regarding the development of future media use. For traditional newspapers, topical questions are, e.g. what will be the effect of paywalls on the use of newspapers, or how do the increasing subscription fees affect to the use of and subscription to print newspapers? Will the loyalty developed through the years of readership survive in these changes? So far, our results suggest that these questions are increasingly important because traditional media are facing competition from the miscellaneous content available in the Internet. Social media and Google are gaining positions as a platform through which people find the content they use. Here, traditional media or the familiar media brands do not have an unquestioned priority. If conducted regularly, the survey will provide information on how, e.g. different regional media outlets get on in this competition and which media seem to be the most important competitors.

Another topical question for regional media companies is how to get print newspapers users to use the online editions of newspapers (website, digital replica, mobile version). According to our results, all age groups reported that they will reduce their use of traditional media (printed paper, television) and increase their use of the websites of news sites. The change seems inevitable. However, it is not that clear what people are willing to pay for this digital content. This was not asked in our study, but according to a recent survey by YLE and Taloustutkimus, over half of the people would like to have all content on the Internet free, and charging fees for the news content was not supported (Yleisradio 2013).

Although the use of printed newspapers and traditional television is decreasing, research has shown that different forms of media may, instead of competing, be complementary. Concerning the young, Herkman and Vainikka (2012) have discovered that there are transitional readers who move between the traditional print materials and social media. Here, new forms of reading are initiated (see also Uusitalo et al. 2011). The findings of Frau-Meigs

(2006) speak to traditional media. This study reported that pre-teens value radio because of its flexibility. Yet the central question will be how to successfully identify the strengths of a particular medium and how to harness and develop these to meet the demands of changing use patterns and changing audiences.

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## Appendix 1: The demographics

**Table 1. Age groups of the respondents.**

<b>Age groups</b>	<b>Percentage</b>	<b>Total (N)</b>
Under 25 years	14 %	128
25-34 years	22 %	202
35-44 years	17 %	157
45-54 years	14 %	130
55-64 years	17 %	150
65+ years	15 %	136

**Table 2. The vocational situation of the respondents.**

<b>The vocational situation</b>	<b>Percentage</b>	<b>Total (N)</b>
Manager/entrepreneur/managerial employee	16 %	146
Clerk	9 %	80
Worker	32 %	287
Unemployed	4 %	40
Student/on courses/ in the military service	13 %	115
At home taking care of children	4 %	34
Retired	21 %	191
Other	1 %	10

**Table 3. Educational background of the respondents.**

<b>Educational background</b>	<b>Percentage</b>	<b>Total (N)</b>
Basic education	12 %	109
Vocational/technical/business school	31 %	278
Upper secondary general school education (ylioppilas)	13 %	120
College (opistotasoinen koulutus)	15 %	132
University education	29 %	259
No reply	1 %	5

**Table 4. Yearly income in the households of the respondents.**

<b>Household's yearly income</b>	<b>Percentage</b>	<b>Total (N)</b>
Under 10 000 euros/year	7 %	67
10 000–24 999 euros/year	18 %	159
25 000–49 999 euros/year	32 %	285
50 000–74 999 euros/year	17 %	150
75 000–100 000 euros/year	6 %	54
Over 100 000 euros/year	3 %	30
Don't know/ Don't want to say	17 %	158