

# **Some Reflections on the Comparability of Newspaper Markets**

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Transparency and comparability of media markets are increasingly important issues in the converging Europe of today. Therefore, it is now essential for those involved in European media research to develop suitable methodologies for compiling comparable statistics for both national and international media markets. Up to now, most of the attention has been focussed on data regarding the comparability of the audience and media consumption (Bauer, Dal and Hallberg 1996; Vihalemm and Lauristin 2002; Vihalemm 2002). With regard to statistics for newspaper markets, three groups of problems can be identified:

- The comparability of the data, which mainly depends on how we define the basic indicators or parameters to describe what a newspaper is;
- the availability of the data and the practical problems of data gathering;
- the issues that arise in connection with new technological means of production and distribution of newspapers.

This article will discuss these three groups of problems within a framework of comparable categories that are used to statistically describe European press markets (i.e. the *European Newspaper Markets* project carried out by the Institute of Journalism and Communication Research, Hannover University of Music and Theatre). The Estonian press market and its respective statistics will be used as an example.

## **Definitions**

Newspaper market classifications and statistics directly depend on the basic criteria that define a newspaper. These criteria are always conventional. They are, moreover, influenced by the cultural backgrounds, national practices and traditions of newspaper publishing within a particular newspaper market and by the dimensions of that market. The consumption habits of newspaper audiences also appear to play a specific role when constructing classifications. This all makes it very difficult to find comparable definitions or to make compa-

rable classifications. From a comparative point of view, it is very important to be aware of the differences.

Six basic criteria were used in the *European Newspaper Markets* questionnaire for gathering data about newspaper markets in different countries:

- Publicity – the publication is available or accessible to everyone
- Continuity – publishing is continuous, not just occasional issues
- Periodicity or frequency – the publication appears regularly, at least twice weekly
- Universality – the content is not limited to either a certain subject, field or theme, or a specific region/location
- Primary topicality – the publication serves as a primary news source for the readers
- Printed version – publication is distributed in printed copies.

According to the definition given in the questionnaire, a newspaper should simultaneously fulfil all the above criteria. Publications that only partly fulfil these criteria should be categorised as "near-newspaper print products".

The practical application of this definition for gathering data on the Estonian newspaper market revealed some inadequacies when these criteria were applied to a small press market. Applying newspaper statistics to subscription and non-subscription papers might suggest that free papers are not to be included in such a systematization. However, free papers may make up a considerable sector of press consumption in a newspaper market. In Estonia, free newspapers are the most frequently read newspapers for nearly fifth of the population. Therefore, free newspapers providing universal content are included in Estonian press statistics and have to be included when developing European press statistics as well.

Another point of contention is where to draw the line between dailies and non-dailies. In the statistics for the Scandinavian and Baltic newspaper markets, the minimum frequency specified for a daily newspaper is four days a week. Publications falling outside this category are considered to be either weeklies or monthlies (*Nordic Baltic Media Statistics* 1998; *Baltic Media Book* 2001). Some statistics do not include newspapers, which are published once a week under the "weeklies" category, instead categorising them as "near-newspaper print products". It could be argued that this practice excludes publications that could actually be considered newspapers by all other characteristics.

According to the definition used by the International Organization for Standardization, newspapers that appear 50 to 52 times per year should be considered weekly newspapers. The statistical offices of the Nordic countries as well as the Estonian Newspaper Association and the University of Tartu use the same definition. The Statistical Office of Estonia and the Estonian National Library use an even wider definition, which includes newspapers appearing less

than 50 times a year. According to 2003 statistics from the Estonian Newspaper Association, the overall number of weekly newspapers in Estonia is 46. However, this number falls to 12, when 34 papers, which appear once a week, are excluded.

Included in Estonian press statistics is a group of magazine-type weeklies that, according to the definitions in the *European Newspaper Markets* questionnaire, are so-called "near-newspaper print products". They are namely: *Eesti Ekspress* (*Estonian Express*), Russian newspapers *Denj za Dnjom* (*Day after Day*), *ME Subbota* (*ME Saturday*) and *Vesti Nedelja Pljus* (*Weekly News Plus*). However, in Estonian press market statistics, these are regarded as weeklies. This can be explained by a tradition originating from the beginning of the 1990s and is connected to the economic difficulties of publishing and printing at that time. These weeklies contained long news stories, features, investigative reports, items about celebrities etc. Originally, they did not have covers and were printed in black and white. In order to sell more advertising space, colourful covers and supplements were added. Indeed, their content is more like that of a magazine than of a newspaper. This type of weekly has become quite popular. Indeed, circulation of *Eesti Ekspress* is the largest amongst Estonian non-dailies – over 45,000 copies.

Another criterion of the definition, "universality of the content", is not a generally agreed criterion for defining a newspaper. The International Organization for Standardization defines a newspaper as a serial publication, which

- contains news on current events of special or general interest
- contains individual sections that are listed chronologically or numerically
- appears at least once a week
- has a masthead rather than a cover
- is normally larger than A3 (297x420 mm) in size.

This particular definition allows the inclusion of publications in newspaper statistics, which focus on certain thematic areas, and are published at least once a week (dailies are considered to be published at least four times a week). In contrast, the definition proposed by the *European Newspaper Markets* questionnaire does not include thematically focused publications. However in many cases, they also cover a wider range of topics and issues of more general interest. One local example is the Estonian business daily *Äripäev* (*Business Day*), which belongs to the Swedish Bonnier Group. Although the outlook of the paper is similar to Bonnier's business paper *Dagens Industri*, it has its own Estonian editorial team who work independently of Bonnier's paper. It should be mentioned here that all newspapers in Estonia have an editorial staff who produce the content and, in most cases, the layout of the newspaper. General Umbrella Sections (GNUS) are not practiced in the Estonian press. However, it is possible to find something similar to GNUS in the Internet issues of a num-

ber of newspapers. Some newspapers belonging to the same company (e.g. *Postimees and Pärnu Postimees* and *Virumaa Teataja*) distribute the same online news.

Another example is the cultural weekly *Sirp* (*Sickle*), which deals with cultural issues within a larger social and political context. The rural weekly *Maaleht* (*Rural Paper*) – the second largest weekly with a circulation of about 41,100 copies – not only reports about rural issues, but also deals with political, social and cultural issues as well as other topics. All the publications cited in the above examples are defined as newspapers for the purposes of Estonian press statistics.

Due to definition problems and the employment of different methodologies in collecting and analyzing data, there can be significant differences in media statistics even within one country. The Estonian Statistical Office, National Library, Estonian Newspaper Association, Tartu University, and the market research company EMOR, all gather statistical data about the media in Estonia. Among these, the Estonian Newspaper Association and Tartu University use similar criteria - defining a newspaper as a printed publication, issued at least 50 times a year, offering information on topical events and issues of general public interest. Nordic countries also use a similar definition. Based on this definition, 70 different newspapers were published in Estonia in 2000 and 2001. However, the National Library and some other institutions use a wider definition that includes both monthlies and less frequently published periodicals in their definition of a 'newspaper'. According to the statistics provided by the National Library, there were 109 newspapers in 2000. The difference is remarkable – 39 titles.

Although it does not seem very productive to define newspaper characteristics in an overly detailed way, it is widely accepted that a broader range of criteria is necessary, including criteria such as format, content (topicality, variety of issues and genres) regularity of publishing, availability and access. Newspapers can also be classified into three different typologies determined by the frequency of publishing, the range of geographical distribution and the thematic orientation. This type of classification would allow specialized publications, such as sports papers, cultural, economic papers to be included in newspaper statistics. This could work better especially with statistics for small press systems where cultural idiosyncrasies seem to have a stronger influence on the make-up of a newspaper than in larger press systems.

## Availability of Data

Newspaper circulation is measured in two ways: the number of printed copies and the number of sold copies. The simplest method for a researcher is to acquire the total number of printed copies from the printing plants. The Estonian Newspaper Association and the Statistical Office use this method for collecting

data. Only the circulation data of the six largest Estonian newspapers is audited. The number of sold copies, of course, is significantly smaller than the number of printed copies. For example, in December 2001, the largest tabloid in Estonia, *SL Õhtuleht*, printed 66,700 copies of which 58,840 copies were sold. Therefore when comparing distribution statistics, it is important to be aware of the type of circulation data which is under consideration.

In Estonia, it is notoriously difficult to acquire data regarding the percentage breakdown between street sales and subscriptions as a percentage of total newspaper revenue. Due to fierce competition among media companies in Estonia, most editors and publishers contend that financial data regarding their publications is a business secret. The same secrecy applies to data regarding editorial staffs and employment policy as well as questions concerning the organisational structure and the culture of a media organisation. Although Estonia has laws regarding public information and data, they do not define the business secret. This makes it easy for business enterprises to conceal data that they do not want to make public.

Data about ownership and owners of the media enterprises is also deemed confidential. Although one can find out the identity of the publisher and sometimes the owner of the publishing company, it is impossible to find out whose money is actually driving the business. For example, the market research company Baltic Media Facts (BMF) attempted to provide information about media ownership in the *Baltic Media Book* (1998 edition), but in subsequent editions BMF had to give up due to the dearth of information. This information is now either unavailable or incomplete.

The task of comparative press market research in Eastern Europe has not been helped either by the lack of familiarity among media researchers (due to the relatively high cost) with statistical publications such as *World Press Trends* (published by the World Association of Newspapers), *World Magazine Trends* (produced by Zenith Media) as well as the *European Advertising & Media Yearbook* (produced by World Advertising Research Centre).

## Online Newspapers and the Press Statistics

One of the traditional parameters of a newspaper is that it must be printed on paper before distribution. Nowadays, an increasing number of newspapers have an online edition in addition to their print edition. In Estonia, all national newspapers and most of regional and local papers can be read on the Internet, as well as a number of magazines (Lauk and Shein 2002).

Up to a few years ago, the print edition and the online edition of a newspaper were virtually identical. This is no longer the case. Today, online newspapers report the latest news all day long and also give their readers the opportunity to comment on news events. Frequently, long interviews or articles are

fully published in the Internet edition while only a shorter version is published in the "real" newspaper. In many cases, both reporters and editorial staff are also obliged to supply the online issue with news. Thus, they often have to write two texts for the same news item – one for the newspaper edition and another for the Internet edition.

An online publication usually has a special editor, a team or a separate unit within the editorial office that is responsible for the online content. Thus, while the Internet version may have many characteristics that are common to the traditional newspaper, it is becoming increasingly independent of the paper version. Furthermore, the Internet issue is becoming the primary news source for many people, especially the younger generation, who prefer to read newspapers on the Internet. According to research, about 60 percent of Internet users in Estonia (who today make up to 43 percent of the adult population) read online publications.

One of the questions arising from all this relates to whether or not press statistics should take these new developments into consideration. How can these developments be incorporated into the statistics? Is it necessary to include the existence of an Internet version as one of the parameters in newspaper market statistics?

## **Overview of the Estonian Newspaper Market in 2002 (According to the Methodology Proposed in the European Press Markets Project)**

The overall picture of the Estonian newspaper market in 2002, based on the data gathered by the *European Press Markets* project, is a different picture to the one portrayed by Estonian national statistics.

The Estonian media market as a whole is one of the smallest in Europe. The population of Estonia is 1.46 million, of which 66 percent are ethnic Estonians. According to 2002 figures, there are a total number of 21 newspapers (with complete editorial staff) with a circulation of 296,300 (printed copies). All newspapers are morning papers and all have a tabloid format. The daily newspapers are published six times a week and there are no Sunday newspapers. There are only two newspapers with a circulation of over 50,000 copies (*Postimees* and *SL Õhtuleht*). In total, 12 newspapers appear five to six times a week, and nine newspapers appear two to four times a week. With regard to the geographical distribution of these newspapers, 6 are national, 12 regional and 3 are local.<sup>1</sup>

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<sup>1</sup> As mentioned in the questionnaire, 1998 the total number of newspapers was 27 (including 16 papers that appeared 2 to 4 times a week and only 11 papers that appeared 5 to 6 times a week). By 2002, the total number has declined because of some newspaper deaths and mergers. On the other hand, some papers have changed their frequency of appearance (e.g. 2 papers that appeared 3 and 4 times a week in 1998, appear 5 times now).

As already explained in this article, Estonian press statistics include publications that appear once a week as well as special interest publications. Therefore, according to the 2002 statistics, there are 72 newspaper titles in total,<sup>2</sup> – 12 dailies (6 national and 6 regional) and 60 non-dailies. Among the rest there are 10 national, 6 regional and 17 local newspapers published one to four times a week.

It appears that the more detailed classification categories become, the fewer publications can be included in the statistics. The development of a universal classification, that would work equally well for both small and large newspaper markets, seems to be quite problematic due to national differences.

### Statistics for Newspaper Products for 2002

- Newspapers with complete editorial staff: 21
- Printed copies: 296,300
- No assorted editions
- Newspaper publishing companies: 21
- Independent newspaper publishing companies: 12 (79,000)<sup>3</sup>  
Companies as part of another company (≥ 50%): 9 (217,300)
- Distribution area:
  - Newspapers with mainly national distribution: 6 (192,600)
  - Newspapers with mainly regional distribution: 12 (81,400)
  - Newspapers with mainly local distribution: 3 (18,700)
- Circulation categories:
  - ≤ 5,000: 5 (15,300)
  - 5,001 – 10,000: 10 (66,200)
  - 10,001 – 50,000: 4 (81,500)
  - 50,001 – 100,000: 2 (127,300)
- Frequency of appearance:
  - Twice weekly: 2 (8,000)
  - 3 times a week: 4 (15,300)
  - 4 times a week: 3 (17,200)
  - 5 times a week: 9 (93,500)
  - 6 times a week: 3 (162,300)
- All newspapers are morning papers
- No Sunday editions
- All have a tabloid format
- No single bias detectable

<sup>2</sup> In *World Press Trends 2003* 70 dailies are mentioned for 2002, while our statistics includes also 2 free papers that were started in late 2002 and were not included in the data for WPT.

<sup>3</sup> In brackets: printed copies.

- Market situation:
  - Newspaper without competition within its geographical market: 8 (61,700)
  - Newspaper is market leader within its geographical market: 4 (83,300)
  - Newspaper is not market leader within its geographical market: 9 (151,300)
- Languages:
  - Official language: 16 (258,800)
  - Non-official language, spoken by part of the native population: 4 (29,000)
  - Multi-language: 1 (8,500)

### Statistics of Near-newspaper Products

- Periodicals, published once a week or less: 11
  - 157,200 printed copies
  - No Sunday editions
- Periodicals primarily covering stories within a limited subject range: 5
  - 21,600 printed copies
- Most common subject matter: Health, Religion, Education, Business, Culture, Sports
- Near-newspaper print products distributed for free: 3
  - Reliable and correct data about publishing companies is not available.

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**Estland****Überlegungen zur Vergleichbarkeit von Zeitungsmärkten (Zusammenfassung)***Epp Lauk*

Die Autorin diskutiert am Beispiel Estlands, wie der kulturelle Hintergrund, die nationalen Verlagstraditionen und sowie die Konsumgewohnheiten der Leser die Tageszeitungslandschaft eines Staates prägen. Die Berücksichtigung all dieser nationalen Besonderheiten stellt eine ländervergleichende Zeitungsstatistik vor vielfältige Probleme.

So konfrontiert beispielsweise das Abgrenzungskriterium der „allgemeinen Verfügbarkeit und Zugänglichkeit“ die estnische Zeitungsstatistik mit der Problematik, dass Gratiszeitungen nicht dem Tagespressemarkt zugerechnet werden. Da sich aber gerade dieser Zeitungstyp in Estland großer Beliebtheit erfreut, wurde in der hier gegebenen Statistik insofern ein Kompromiss eingegangen, als Gratiszeitungen mit *universellem* Inhalt berücksichtigt wurden. Unterschiede zwischen der estnischen Zeitungsstatistik und den Kategorien des im Projekt „Europäische Pressemärkte“ verwendeten Fragebogens ergeben sich gleichermaßen im Hinblick auf die Klassifikation der Erscheinungshäufigkeit und hinsichtlich der Praxis, dass sich themenspezifischen Zeitungen mit ihrem Fachgebiet durchaus in einem größeren sozialen und politischen Kontext auseinandersetzen.

Im Jahr 2002 erschienen in Estland 21 – durchwegs von Vollredaktionen hergestellte – Tageszeitungen (6 nationale, 12 regionale und 3 lokale) mit einer Gesamtauflage von gedruckte 296.300 Exemplaren. 16 Tageszeitungen wurden in der offiziellen Amtssprache veröffentlicht, vier Zeitungen standen der russischen Minderheit zur Auswahl, eine Zeitung ist mehrsprachig. Darüber hinaus gab es 12 weitere themenspezifische Tageszeitungen und 60 Wochenzeitungen. Alle nationalen sowie die meisten regionalen und lokalen Zeitungen besitzen eigene Internetplattformen.

In Estland sind mehrere staatliche und private Institutionen mit der Sammlung von Pressedaten befasst. Allerdings gibt es auch zwischen diesen Institutionen sehr unterschiedliche Auffassungen über die Definition des (Tages)-Zeitungsbegriffs. Konsens besteht jedoch darüber, dass einem kleinen Pressesystem mit vielen kulturellen Eigenheiten weiter gefasste Zuordnungskriterien zu Grunde liegen sollten.

Die Auflagenzahlen werden vom estnischen Zeitungsverband und vom Statistischen Zentralamt gesammelt. Kontrolliert werden aber nur die Auflagenzahlen der sechs größten Zeitungen. Die Ermittlung von Unternehmensdaten ist schwierig, da sie von den Verlagen aus Wettbewerbsgründen als Wirtschaftsgeheimnis gehandhabt werden.

