

# COMMERCIAL TV IN FINLAND 2021

**SCREEN  
FORCE**  
THE MAGIC OF TV

Four members - one team! ■ [screenforce.fi](https://screenforce.fi)





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## More screens with better resolution and better connections

There is power in television: it reaches up to 85 per cent of Finns every week. Due to the unprecedented circumstances created by COVID-19 people have spent a lot of time at home – watching television has remained a popular

pastime. In 2021, TV was watched for as long as 2 hours and 43 minutes a day. Digitalisation has further increased the time spent in front of TV screens: last year, an average of 3.5 hours a day were spent in front of big screens. In addition, TV content is more and more often consumed via mobile devices such as tablets or phones. TV viewing which combines linear and online TV viewing is called Total TV – it's TV you can watch anywhere anytime.

Last year, domestic streaming services (Yle Areena, mtv-service, C More, Ruutu and Ruutu+) reached a third of Finns every week, which is 20 per cent more than in the previous year. According to an international **Ampere Analysis study**, subscribing to two streaming services is generally the most people are willing to commit to. The number of paid streaming services subscribers has doubled in five years, and it seems safe to assume that a saturation point has most likely been reached both in Finland and worldwide.

Although TV content is now viewed on many different devices, big screen viewing is still popular (85 % use a big screen) and people appreciate a high-quality viewing experience. Also watching online TV on the big screen became more common last year, with as many as 43 per cent watching streamed programs on the big screen. Indeed, it is clear that we now have more screens, faster connections and higher video quality.

According to the Finnpanel's TV Economies in Finland survey, 59 per cent, or almost 1.5 million Finnish TV households, own a smart TV. More than 1.2 million households (48% of all TV households) have a device which is connected to the Internet (CTV). At Screenforce, we keep a close eye on how the market for CTV advertising is developing. For the time being, the growth of CTV advertising and the strengthening of its role still require structural changes in the market. You can read more about this topic in **IAB Finland's CTV guide**.

Television is doing well in Finland. Compared to many other countries, Finland has, for instance, an exceptionally high-quality free-to-air channel offering. The popularity of domestic content has grown over the past ten years, and the assumption is that domestic stories and programs will continue to be important to Finns in the future. Although viewing between streaming services is fragmented, demand for domestic content ensures that a majority of Finnish screentime will continue to be spent on domestic Total TV content.

### **Anna Lujanen**

Executive Director  
Screenforce Finland

# 2021 IN FIGURES

5.5M

Finns

2.6M

households

2.5M

TV-households



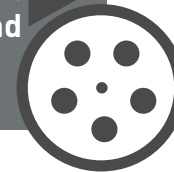
Daily  
TV viewing  
time



85%  
watch TV  
on a weekly  
basis

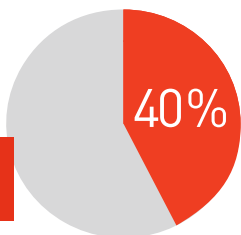


The most  
watched TV-  
genres are  
fiction and  
film



40 % of time  
spent with  
media goes to

**TOTAL TV**



260,1 M€  
spent on TV  
advertising  
(20.4 % of all  
media advertising  
spending)



52%

of all TV viewing is on  
commercial channels

64%

of viewing is domestic  
content



TV  
advertising  
brings  
the best  
ROI

TV advertising is the

**MOST TRUSTED**

type of advertising





# THE LAND OF MILLIONS OF TVs





## Finland is a TV nation

- Percentage of TV-households in Finland

93%

- Percentage of households with Internet connection

96%



Source: Finnpanel study "TV-households in Finland", 4/2021

Television is a mass media providing content on all screen devices. TV is defined by its content, not the device it's viewed on.



## Using a TV screen plays a **BIG** role

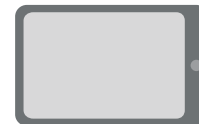


Source: Finnpanel study "TV-households in Finland", 4/2021

## Devices are found in almost every household



Computers in  
88% of households



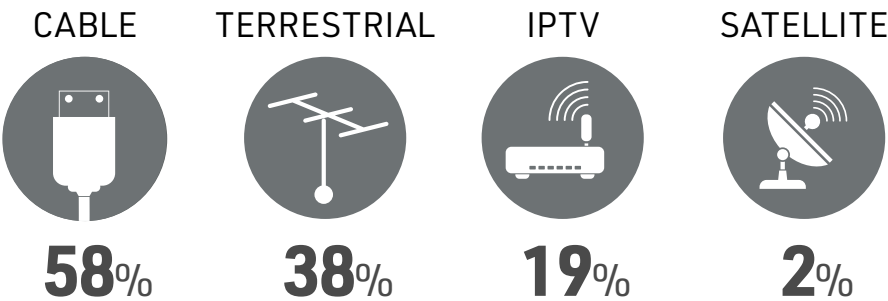
Tablets in  
54% of households



Smartphones in  
90% of households



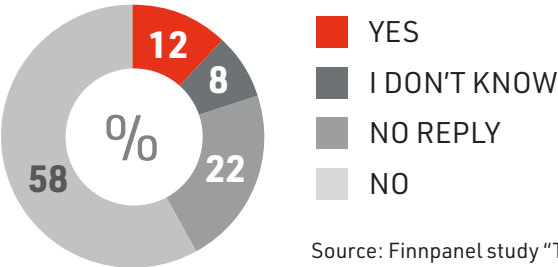
# TV transmission platforms in Finland



Source: Finnpanel study "TV-households in Finland", 4/2021

## Is there a Hybrid TV in your household?

(% of TV-households)



Source: Finnpanel study "TV-households in Finland", 4/2021

## Hybrid TV usage is increasing

SMART TVS	1 500 000	HYBRID TV	900 000
SMART TV ONLINE	1 200 000	HYBRID TV DAILY ACTIVITY	600 000

Source: Finnpanel study "TV-households in Finland" 4/2021 and Digita Oy HybridTV -devices, 3/2022

### Hybrid TV enlivens the TV viewing experience

Hybrid TV, or HBBTV, enriches one's TV viewing experience by bringing internet's interactive features to the TV setting. Viewers and advertisers get a chance to participate in the TV programs by using services enabled by the hybrid TV. These services make it possible, for instance, for viewers to search additional program content online, or to vote for their favourite contestant using just a remote control.

Hybrid TV services are available on most channels on both antenna and cable TV networks. The receiver must have an internet connection and HBBTV features must be activated. For advertisers, hybrid TV offers new interactive advertising solutions.

Source: Digita Oy, 3/2022



**40 % OF DAILY MEDIA TIME IS  
SPENT WATCHING TV**

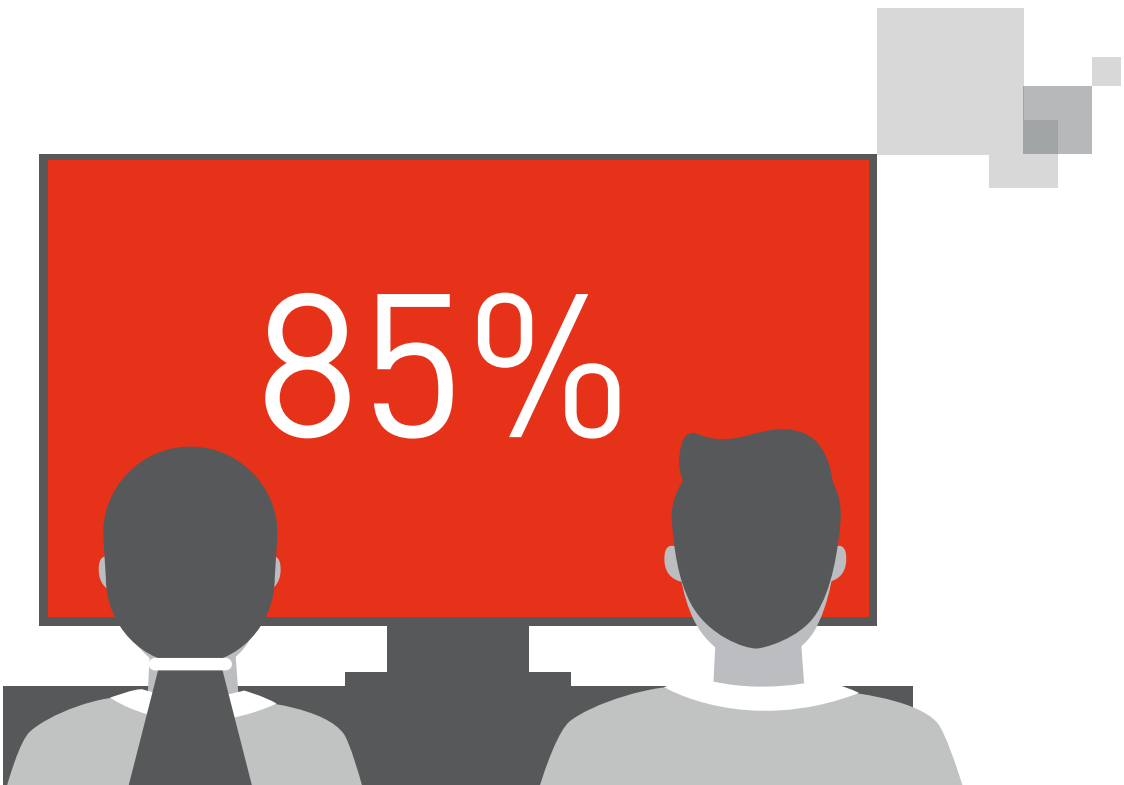
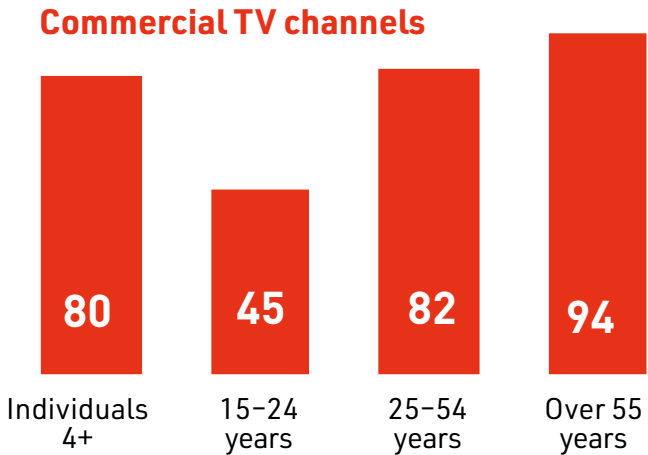
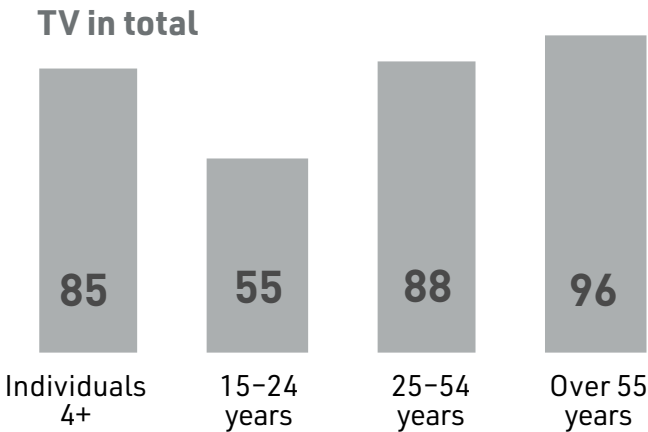




# Television reaches 4.5 million Finns per week

85% of Finns watch TV weekly, 65% daily

## TV weekly reach across age groups, %



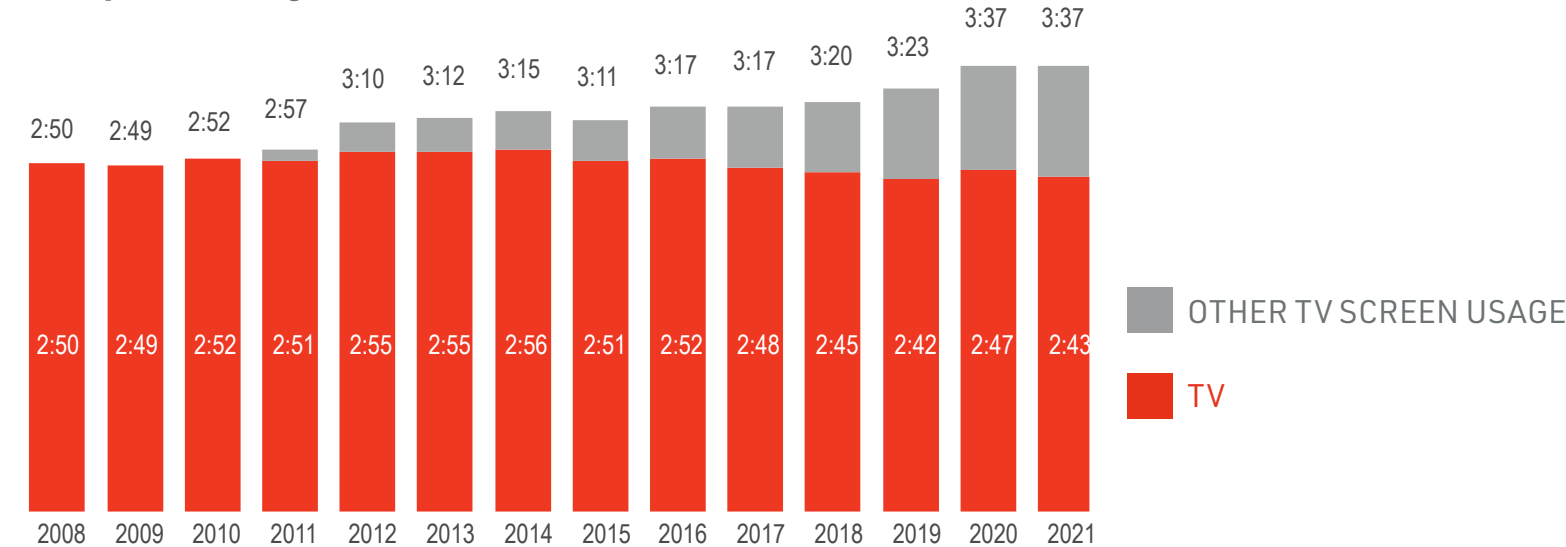
Source: Finnpanel Ltd, TV Audience Measurement, 2021

# Time spent with the TV screen is increasing

Daily TV viewing is 2 hours 43 minutes

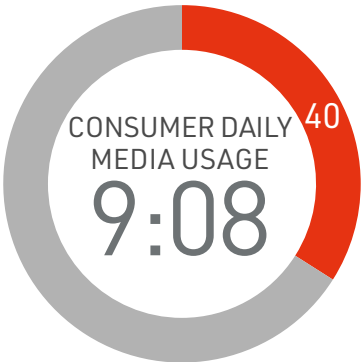


Time spent viewing TV screens, t=min



Source: Finnpanel Ltd, TV Audience Measurement (over 4 years of age). Other TV screen usage includes streaming services, old recorded content, gaming and DVD/ BluRay viewing.

## Total TV takes up 40 % of daily media usage



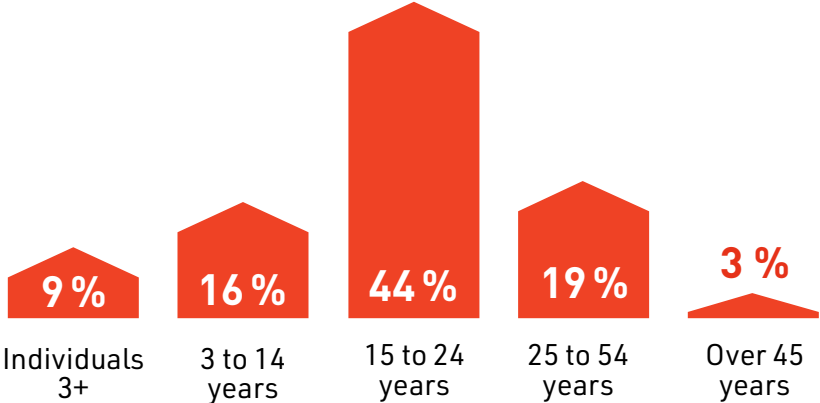
Source: Kantar Mind 2020, N=21049 est. 3,8M 15-74v  
Total TV = linear TV (commercial + public TV channels), internet-TV and paid streaming and VOD services

TV + online-TV = Total TV

More on Total TV measurements on page 22



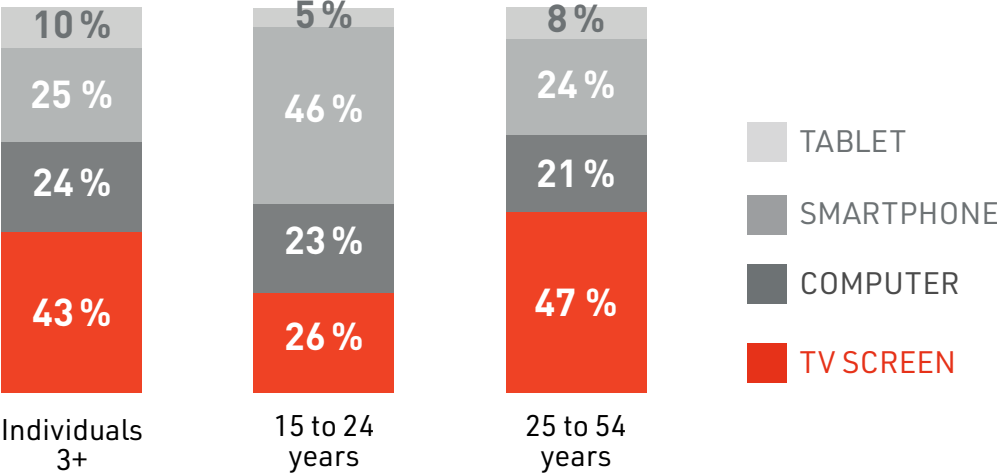
# Online viewing increases TV content viewing by 44 % amongst 15-24 year olds



Source: Finnpanel Ltd, TV Audience Measurement and Finnpanel Ltd, Total TV measurement (over 3 years old), 2021. TV viewing on MTV, Yle and Sanoma channels. Online viewing (vod + simulcast) for tagged players (Yle Arena, MTV service & C More- and Ruutu & Ruutu +).

## Online viewing per device

Percentage of viewing time



Source: Finnpanel Ltd, Total TV measurement, 2021

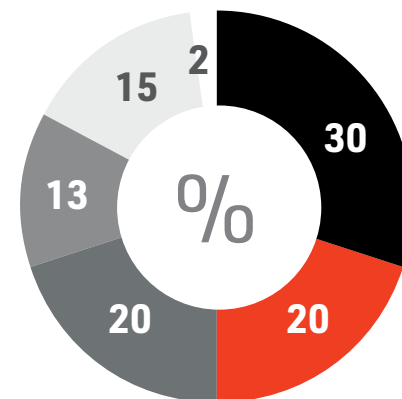




## Most watched TV genres in Finland in 2021

(% of viewing)

Series and film	30%	
News and current affairs	20%	
Entertainment and reality TV	20%	
Documentary and lifestyle	13%	
Sports	15%	
Children's programming	2%	



Source: Finnpanel Ltd, TV Audience Measurement, 2021

64% of all viewing  
is local  
content.





# COMMERCIAL TV ENTERTAINS AND INSPIRES



There are more than 16 commercial  
TV channels in Finland.

Online services



mtv3 sub. nva

mtv ▶



4 liv Sim HERO

ruutu



discovery+

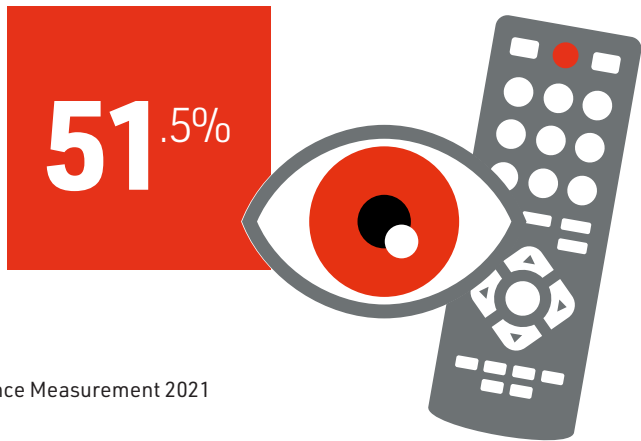
★EUROSPORT



FOX NATIONAL  
GEOGRAPHIC

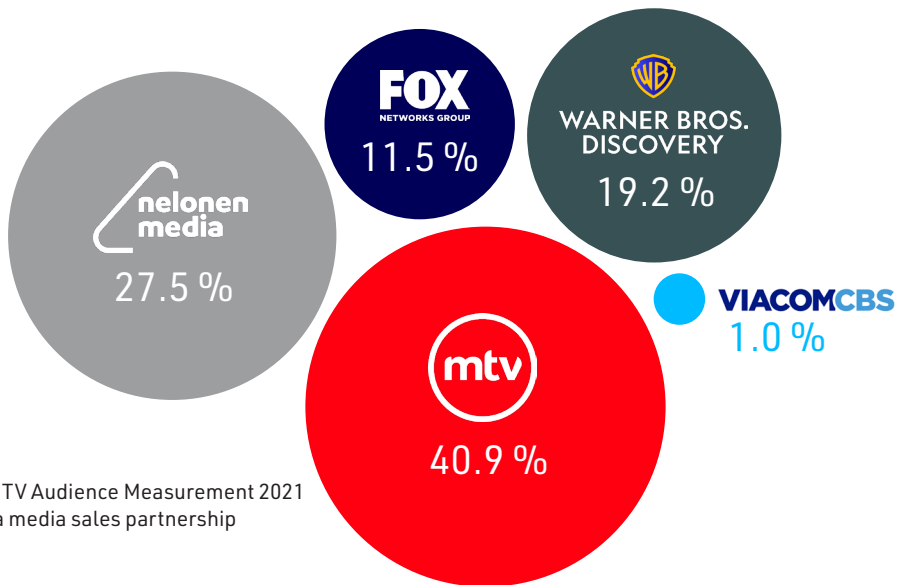


# Share of commercial TV viewing



Source: Finnpanel Ltd, TV Audience Measurement 2021

# Share of commercial TV viewing amongst viewers aged 25 to 54 years



Source: Finnpanel Ltd, TV Audience Measurement 2021  
Sanoma and Fox have a media sales partnership

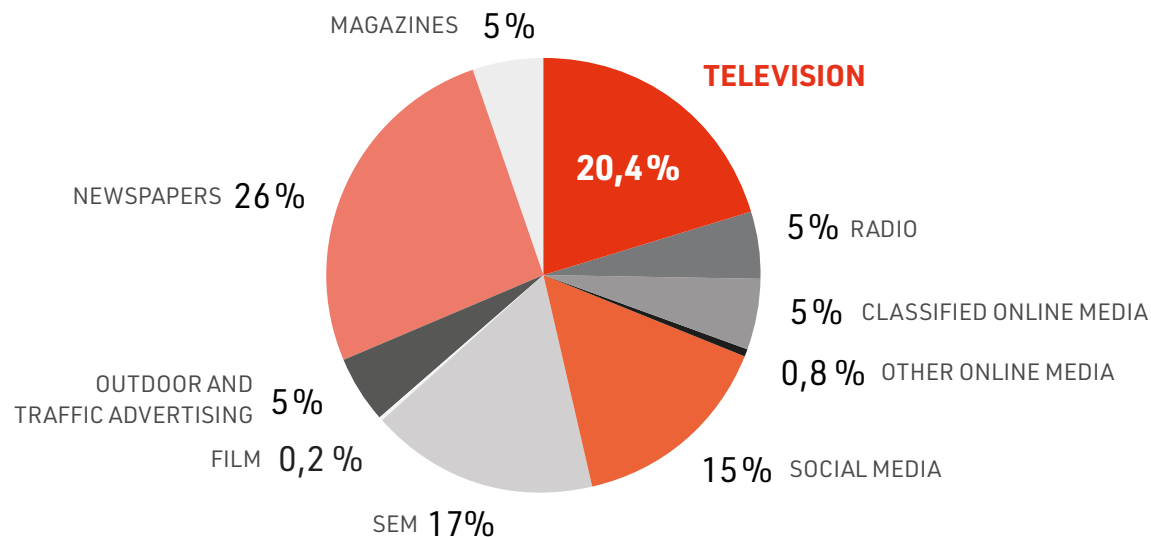




# TV ADVERTISING IS EFFICIENT AND RELIABLE



## Share of media advertising per media group



Source: Kantar, Media advertising expenditure, 2021

## Leading industries advertising on TV (descending order)

1. Retail
2. Groceries
3. Medications
4. Media publishing
5. Other services
6. Motor vehicles
7. Detergents
8. Entertainment
9. Cosmetics
10. Banks and other financial institutions

Source: Kantar, Media advertising expenditure, 2021

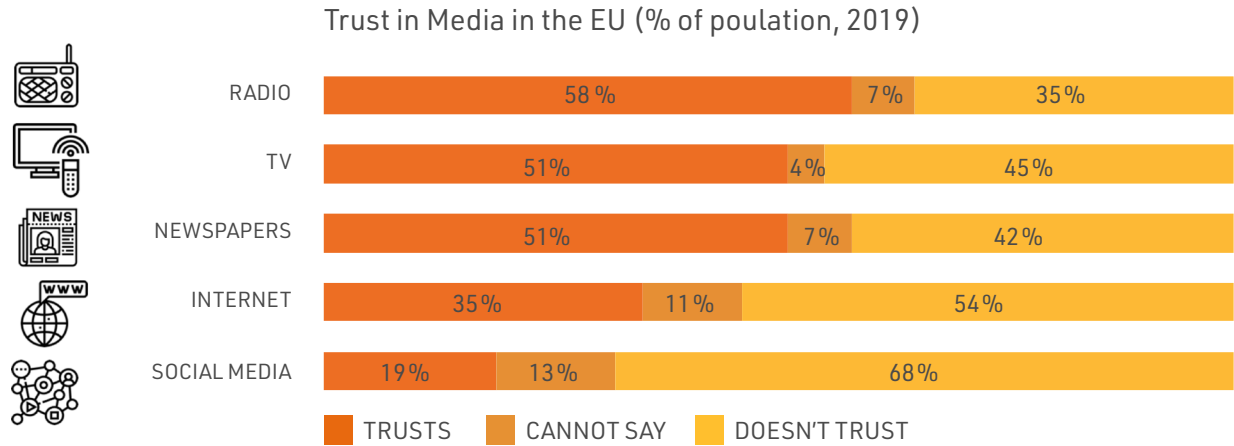
**260.1**  
million used  
for television  
advertising in 2021  
(total EUR 1 275.8  
million for all media  
advertising)



Source: Kantar, Media advertising expenditure, 2021



# TV is a trusted media

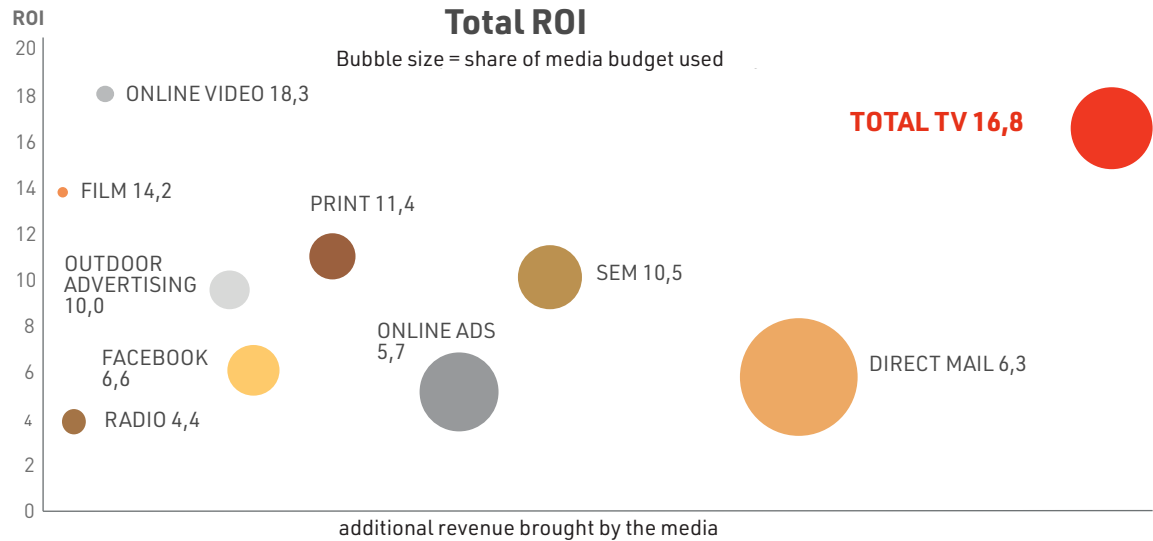


Half of EU citizens trust television as a media.

78 % of Finns trust television.

Source: EBU Media Intelligence Service –Trust in Media, 2021

# TV advertising gives the highest returns



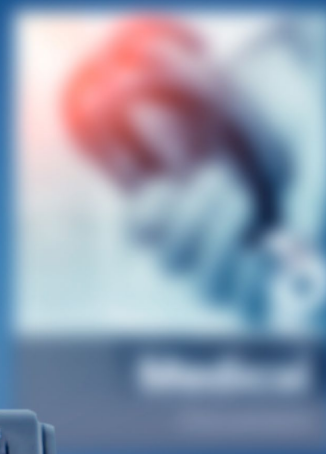
Source: Screenforce and Gigantti, ROI survey 2019

Video On Demand

Search

# FINLAND RANKS HIGH INTERNATIONALLY

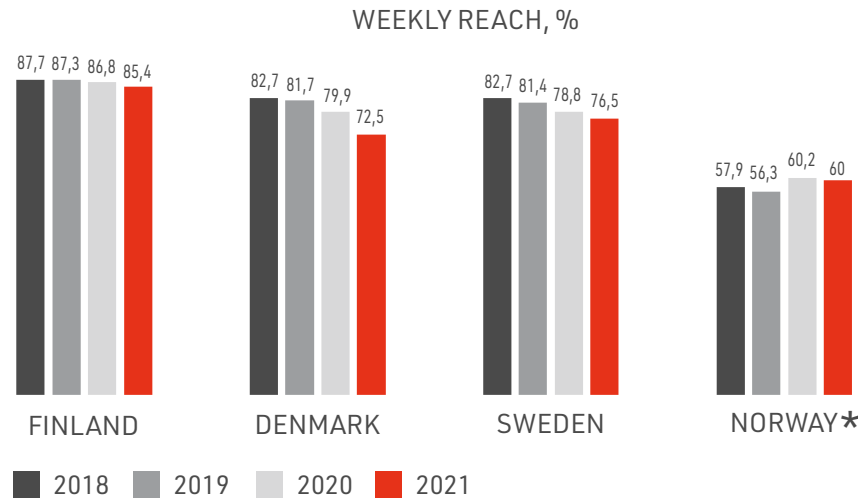
Comedy | Thriller | Family | Drama



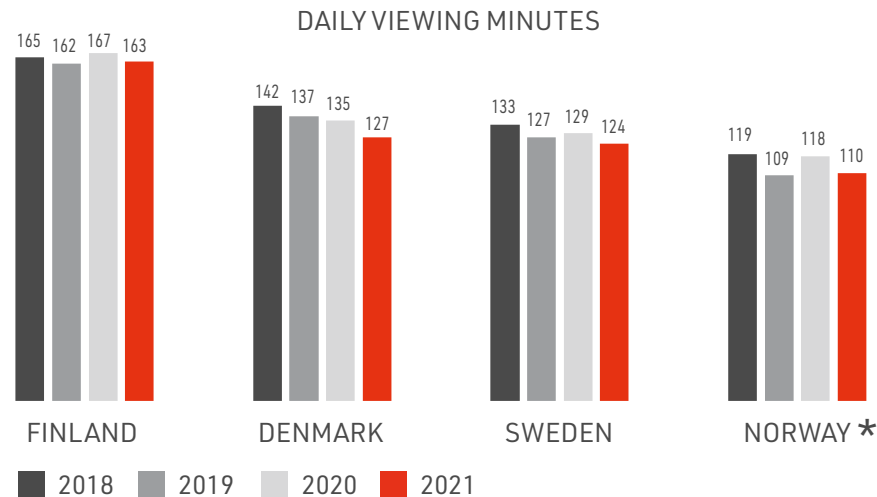


# Finns watch the most TV in the Nordic countries

## TV weekly reach in Finland and other Nordic countries from 2018 to 2021



## Daily TV viewing minutes in Finland and other Nordic countries from 2018 to 2021

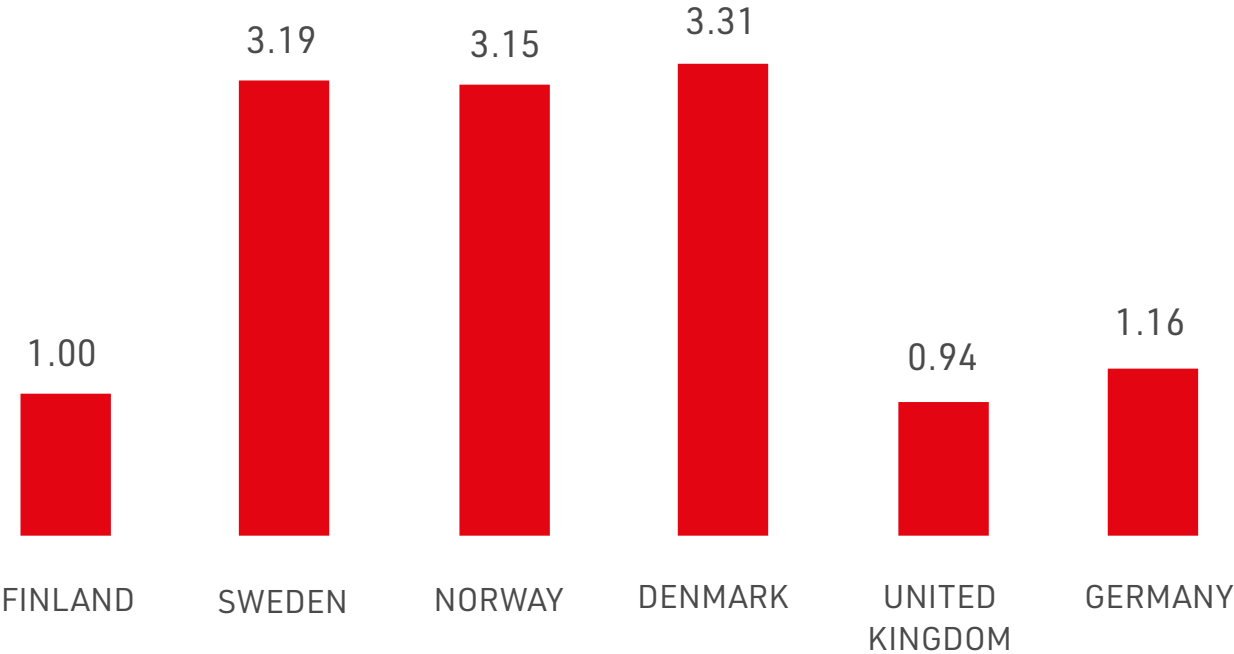


Comparing the Nordic countries, it emerges that the Finnish TV market has remained strong, both in terms of reach and viewing minutes. Furthermore, TV advertising is very competitively priced.

Source: over 3 years of age, in Finland over 4 years of age; Finland (Finnpanel), Denmark, (TNS Gallup), Norway (TNS Gallup Norway), Sweden (MMS) \*Change in measurement method in Norway in 2018

**In Finland, TV advertising is very competitively priced compared to other countries**

**CPT gross price index, 25 to 49 years of age (Finland = 1.00)**



Source: Dentsu 12/2020, CPT gross price comparison. Prices calculated by natural viewing.





# TV + online-TV = Total TV

In Total TV measurement, viewing is measured from all devices, including mobile devices. Duplicate viewing is removed. The measurement combines data from peplemeter panel families, and video measurement from TV companies.

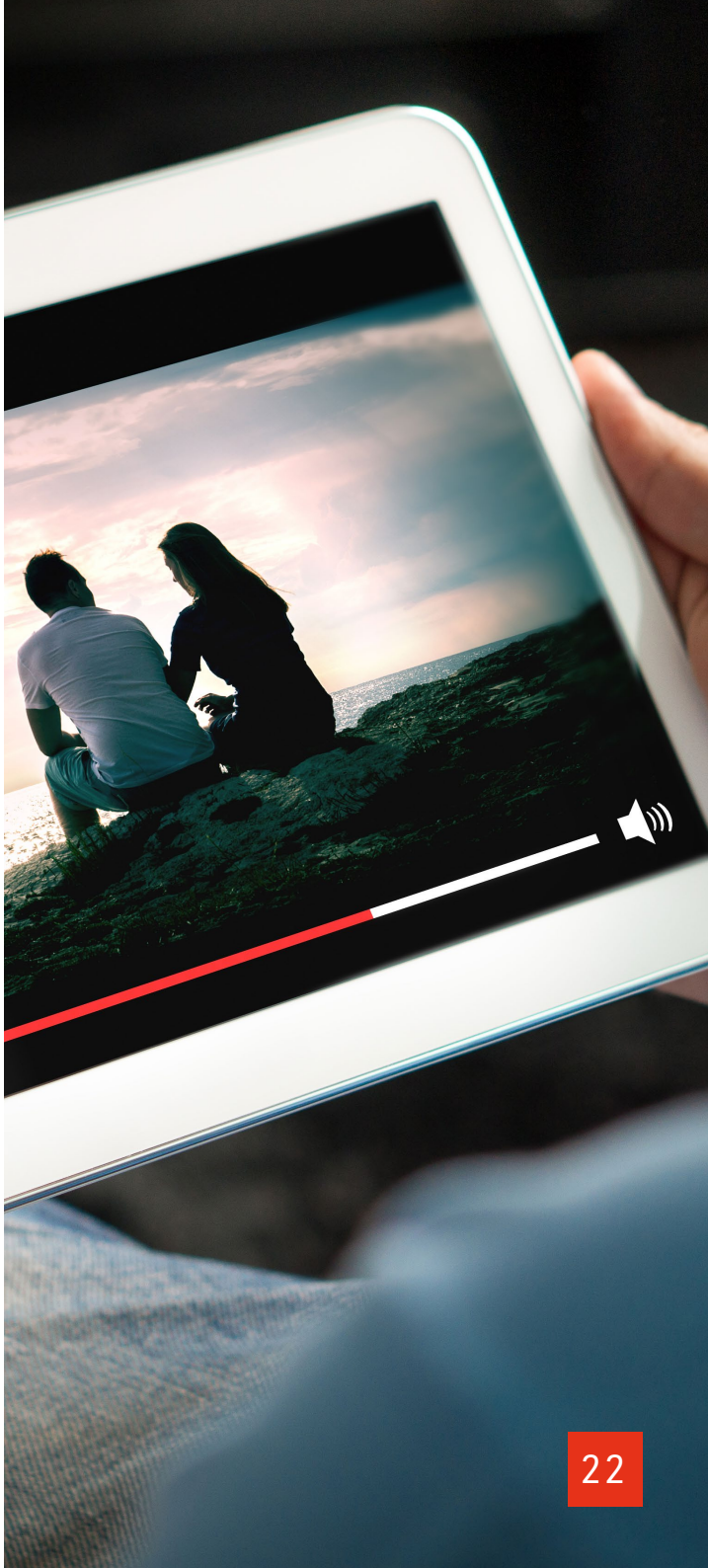


1 000 households  
2 100 individuals  
1 390 TVs



1 690 smartphones  
1 370 computers  
600 tablets and 230 gaming consoles

**TV + Online-TV = Total TV**



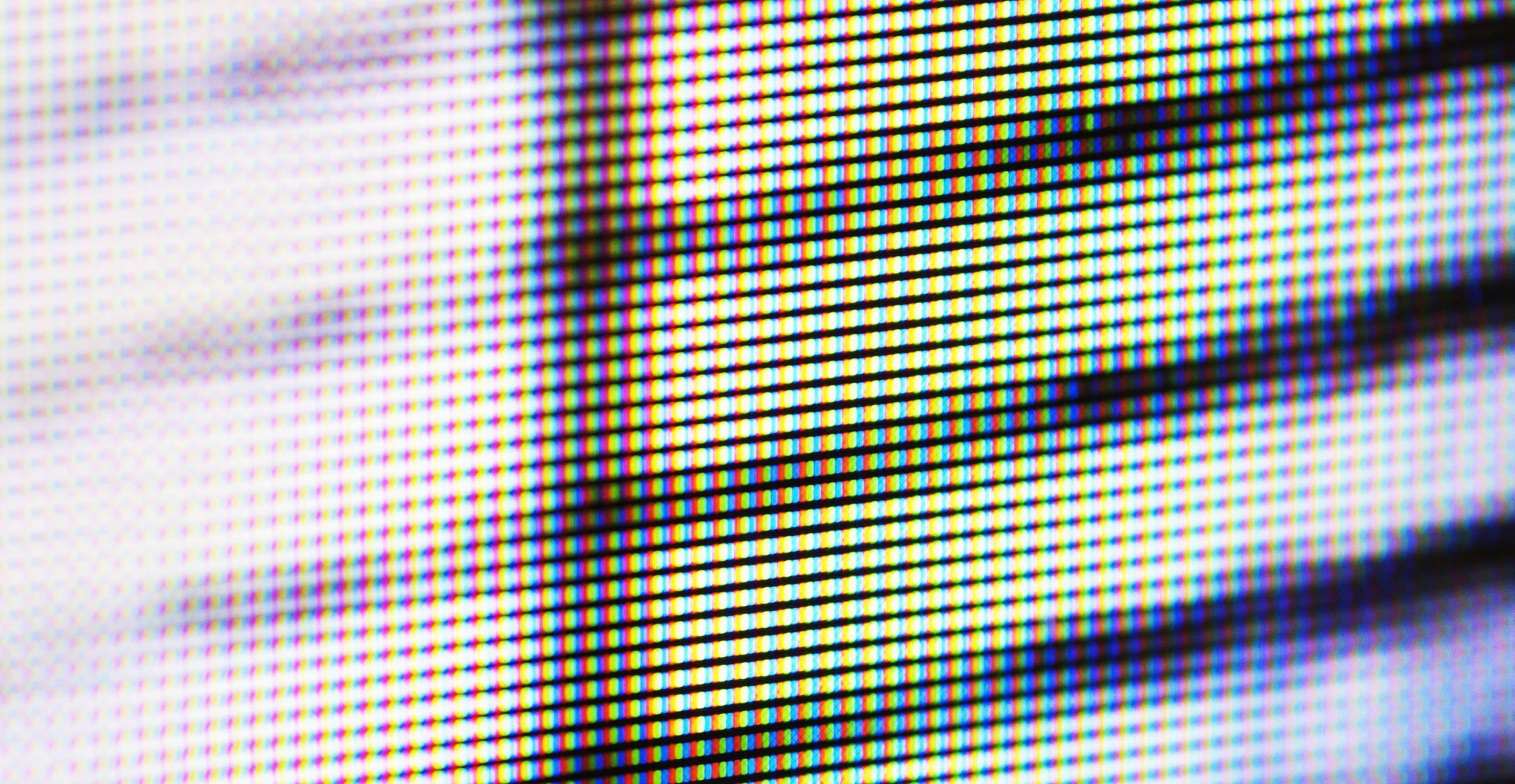
Source: Finnpanel Ltd, TV Audience Measurement and Finnpanel Ltd, Total TV measurement





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