

COMMERCIAL TV  
IN FINLAND  
2023

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



The Walt Disney Company

s a n o m a



WARNER BROS.  
DISCOVERY

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# The changing media landscape

The structures of global streaming services are changing rapidly, and subscription models are undergoing an unprecedented transformation. As subscriber volumes in the streaming market have saturated, companies have also switched to offering advertising-funded subscription models, which will lead to a clear growth in streaming advertising in the future.

## Commercial TV's share of total viewing increased

In 2023, on average, 29% of total viewing in Finland was non-linear TV (Finnpanel's 2023 TV metric survey, 4+; the figure includes streaming services and other TV screen viewing, for example). Commercial TV's share of total viewing increased in 2023.

Finnpanel's latest TV statistics show that Finns enjoyed watching TV at length in 2023: on average, people spent 3 hours 37 minutes on their TV set. 2h 38 minutes were spent watching TV channels. In today's world, there is ever more intense competition for time and attention, and television takes up a significant share of the Finns' day.

TV content is consumed the most on large screens in all age groups and, in Finland, 1.5 million households already have a smart TV. This enables diverse content consumption with a high-quality viewing experience that also makes for an attractive advertising environment for advertisers.

## Attention is becoming increasingly important in advertising

As consumers become more focused on where their attention is going, brands are increasingly facing challenges in achieving the desired results through advertising. From the advertiser's point of view, TV advertising is particularly effective at attracting the viewer's attention and maintaining it for longer when compared to other media. The more attention a brand gains, the more likely they are to achieve their business goals.

Screenforce wants to help the Finnish market understand attention measurement and how it can be used in our market. The aim of attention measurements is to find out how much attention has been gained through media advertising, and measurements are currently a topical subject.

The Attention Council (TAC) is a non-profit community that aims to promote the use of media advertising attention metrics. Screenforce Finland has joined TAC and, over the coming years, there will be a lot of talk and information about attention metrics.

In the future, artificial intelligence and technology will extensively shape the media industry as a whole. For example, the production of content and advertising as well as the creative process will change significantly as AI improves cost efficiency. The new technology also makes it possible to create different photography landscapes, allowing advertising production plans for paradise islands to



be realised in the snowy Finland. All the better for the climate and the budget!

Over the coming years, the television industry will have to tackle a number of challenges for advertisers: sustainability, attention measurement and cross media measurement. In the Finnish TV industry, there is a strong desire to tackle these new challenges and continue to be a trustworthy, transparent and impactful media.

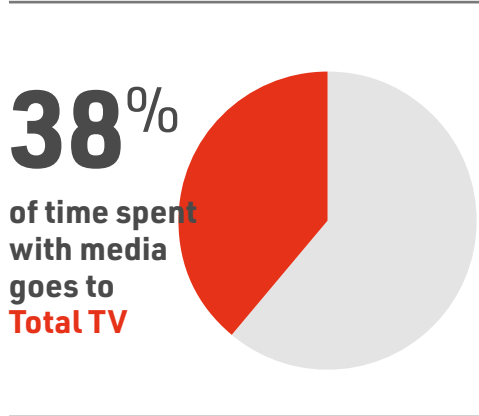
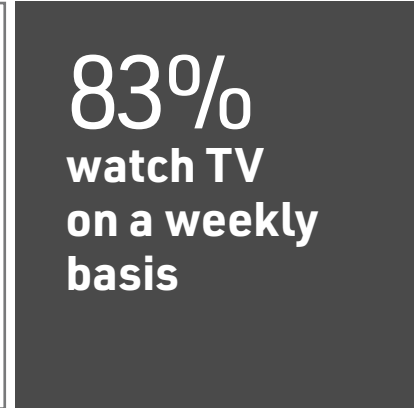
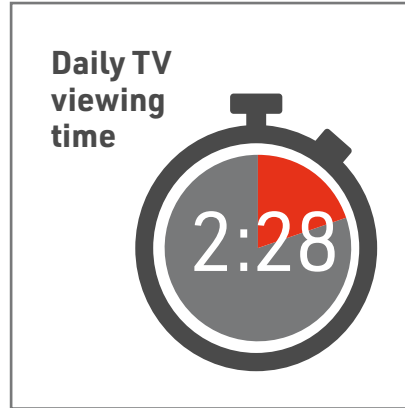
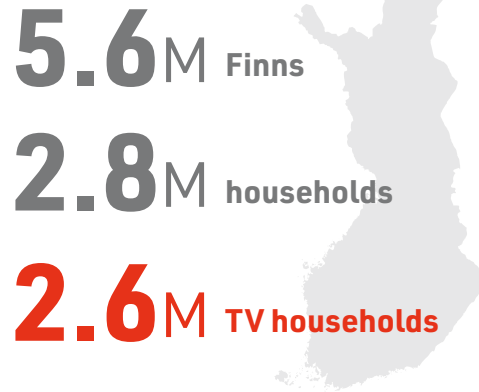
### Anna Lujanen

Executive Director, Screenforce Finland

Sources: TV Audience Measurement 2023, 4+; Finnpanel Oy, 2023; TV Households in Finland Survey, Finnpanel Oy, 2023



# Year 2023 in figures



**54%** of viewing is domestic content

**53%** share of commercial TV viewing



**TV advertising offers the best ROI.**

All sources mentioned later in the report.



# FINLAND IS THE LAND OF A MILLION SMART TVS



**LEGO® MASTERS  
SUOMI**

## Finland is a TV nation

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

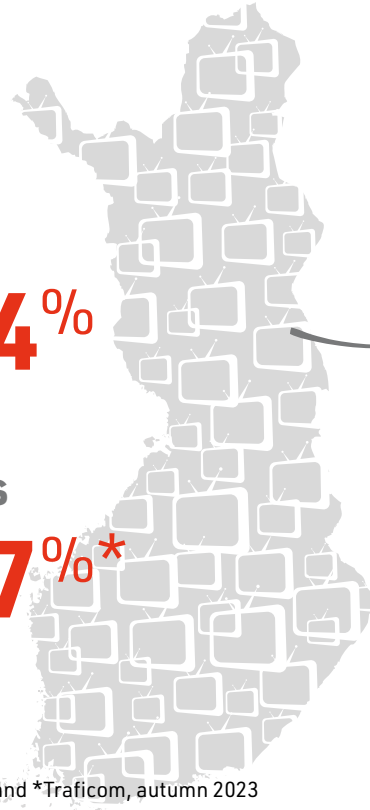
### High device penetration

Percentage of TV households in Finland **94%**

### Unlimited internet access

Percentage of households with Internet connection\* **97%\***

Source: Finnpanel; Tv Households in Finland Survey 2023 and \*Traficom, autumn 2023



Using a TV screen plays a big role:

**4,511,000**  
televisions in Finland

Source: Finnpanel; TV Households in Finland 2023

### TV households also have many other devices

Tablets in **53%** of households



Computer in **86%** of households



Smartphone in **92%** of households

Source: Finnpanel; Tv Households in Finland Survey 2023

## In Finland, most people watch smart TVs on a big screen

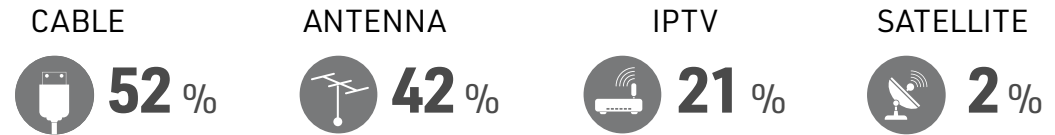
One in five households has a TV that is at most two years old, and as many as 60% of households have a smart TV.

A total of 2.3 million households, or 83% of all households, watch TV programmes or video content for free online at least on a monthly basis.

SMART TVS	1,634,000
SMART TV ONLINE	1,265,000
HYBRID TV	500,000
HYBRID TV ONLINE	439,000

Source: Finnpanel; Tv Households in Finland Survey 2023

## TV transmission platforms in Finland



Source: Finnpanel; TV Households in Finland 2023

### Antenna or cable TV

A trigger or instructions are added to the broadcast on a certain channel at the desired time that the viewer can use to search for information online.



### Online TV

The receiver fetches the desired content from the Internet to be displayed on the screen.



# TELEVISION IS A POPULAR PASTIME IN FINLAND



# Unelmahäät



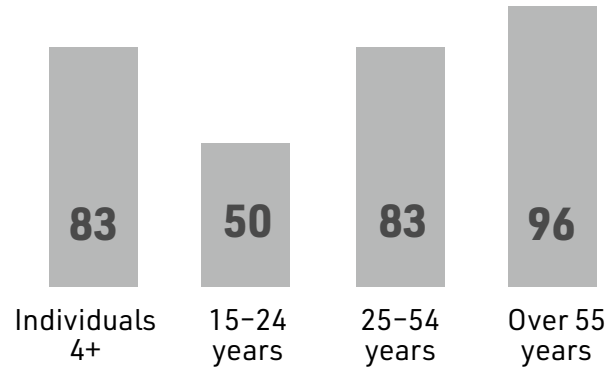
Television reaches  
4.4 million Finns  
every week

61%  
of Finns watch  
TV daily and  
83%  
watch TV  
weekly.

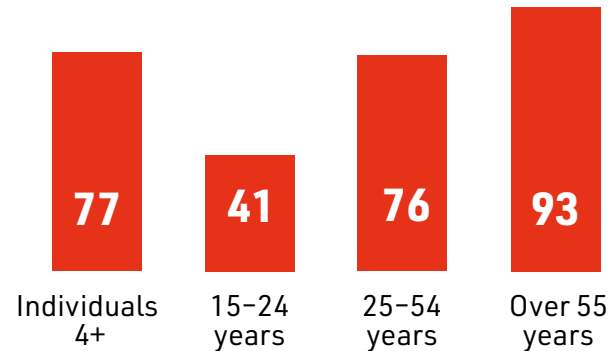
Source: Finnpanel; TV Audience Measurement 2023

TV weekly reach across age  
groups, %

TV in total

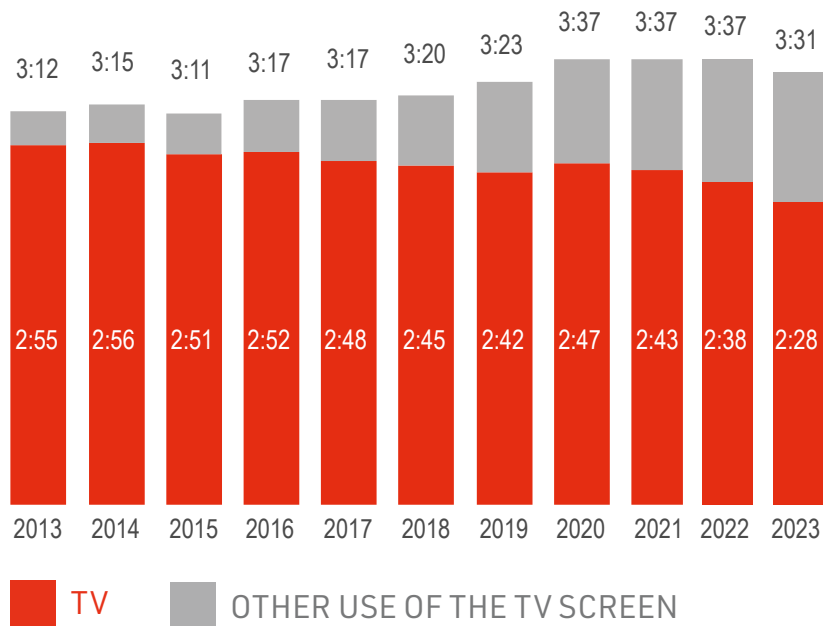


Commercial TV channels



## Finns spend a lot of time watching TV

Time spent using the TV screen, h:min



**TV + Online TV = Total TV**

More on Total TV measurement on page 34.

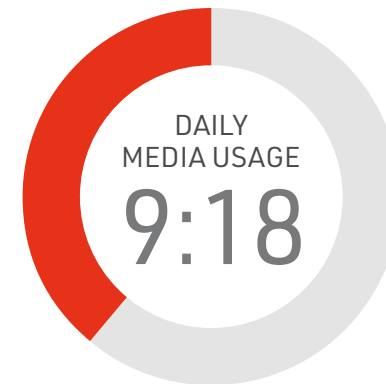


Daily TV viewing is **2 h 28 min**

Source: Finnpanel; TV Audience Measurement 2023 (+4 years of age). Other screen usage includes streaming services, old recorded content, gaming and DVD/Blu-ray viewing.



**38%**  
of daily media usage is spent on **Total TV** content



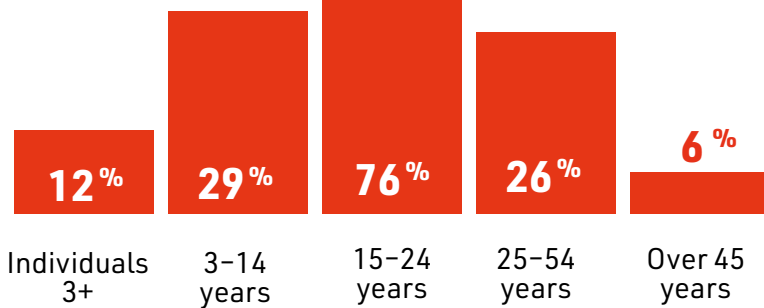
TOTAL TV 38%  
OTHER MEDIA 62%

Source: Kantar's Mind 2022, ages 15-74  
Total TV = Television (commercial + public TV channels, Internet TV, paid and VOD services)

## Online viewing increases TV content viewing

Among 15-24-year-olds, online viewing increases TV content viewing by

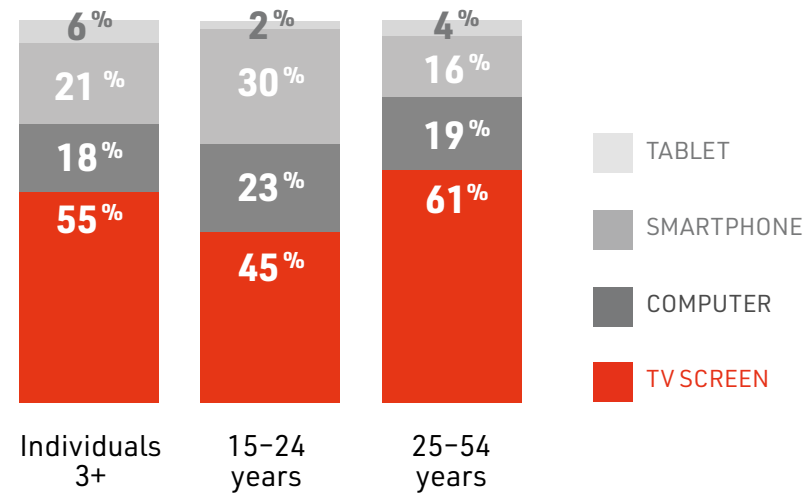
# 76%



Source: Finnpanel, TV Audience Measurement and Total TV Measurement (3+ years of age), 2023. TV viewing MTV, Sanoma, Warner Bros. Discovery and Yle channels. Online viewing (VOD+simulcast) for tagged players (Yle Areena, MTV-palvelu and C More, Ruutu and Ruutu+).

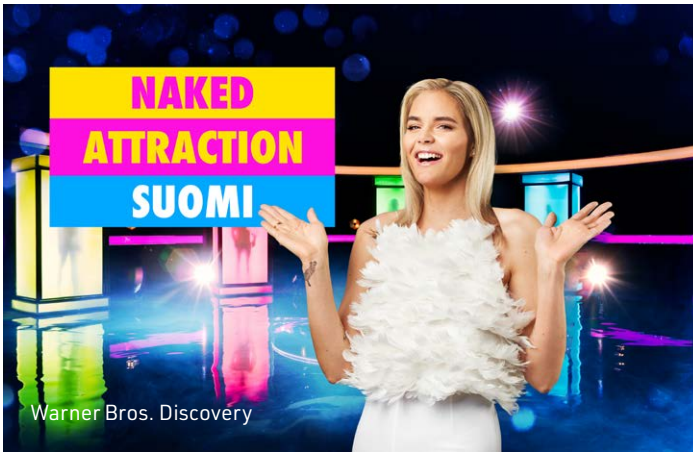
## Online viewing per device

Percentage of viewing time



Source: Finnpanel; Total TV Measurement 2023





**54%** of all viewing  
is local content

## Most watched TV genres in Finland in 2023

(% of commercial channel views)

Series and films	39%	
Entertainment and reality TV	28%	
News and current affairs	17%	
Documentary and lifestyle	7%	
Sports	7%	
Children's programming	1%	



Source: Finnpanel Oy, TV Audience Measurement 2023, including commercial channels for which genre information is available





# THE FINNISH COMMERCIAL TV MARKET IS STRONG



# There are more than 15 commercial TV channels in Finland

## Streaming services

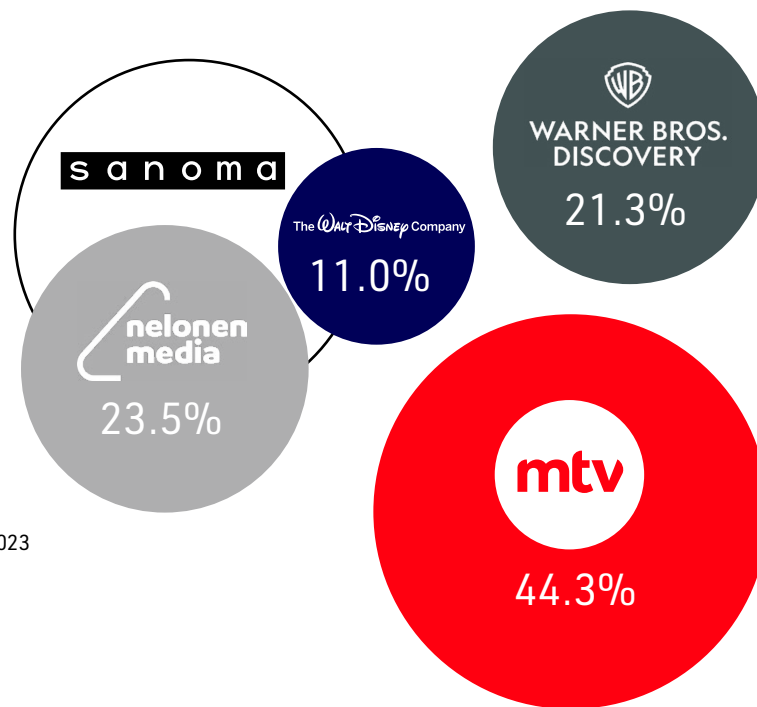




**64%** of the viewing of 25–54-year-olds  
on commercial TV channels

Source: Finnpanel; TV Audience Measurement 2023

**Share of  
commercial TV  
viewing amongst  
viewers aged  
25–54 years**



Source: Finnpanel; TV Audience Measurement, 2023



## Did you know these distinguishing factors about the Finnish TV market?

**High-quality content free of charge:** In the Finnish television market, consumers enjoy high-quality content for free on linear channels as well as in streaming, whether it is sports or sensational programmes. This sets Finland apart from many other countries, such as the United States and Sweden, where commercial TV channels are traditionally premium channels.

**Slower decline of linear TV:** Unlike in many other markets, the popularity of linear TV in Finland is declining more slowly. This is partly due to the offering of high-quality, free content. Compared to the rest of the Nordic region, linear TV reach is 10% higher in Finland.

**Age structure:** The age structure in Finland is one of the reasons why the decline of linear TV is slower in Finland and why the transition to streaming is slower than in other markets. The age structure differs significantly from, for example, the US, where 52% of the population is under 40. Only 37% of Finns are under the age of 40.\*\*

**Unlimited, high-quality internet connections:** Even though linear TV consumption is declining more slowly, more and more streaming content is being consumed alongside it. In Finland, the transition will be facilitated by the fact that we have exceptionally unlimited and high-quality internet connections globally and a high device penetration.

**Data quality and transparency:** In Finland, the quality of data and the transparency of advertising are among the best in the Total TV market. Already in 2018, Finnpanel launched Total TV measurement, which measures the consumption of traditional TV channels and domestic streaming services. A third-party audited measurement is a reliable way for an advertiser to review campaign results and make high-quality decisions based on them.

**HVOD is a challenge for international operators:** Unlike in many other markets, only domestic operators currently offer consumers HVOD subscription models in Finland. However, Screenforce foresees the arrival of HVOD subscription models from international operators on the Finnish market, as almost all operators except Apple TV+ have released their own versions in the US, and Disney+, for example, launched the model in Sweden in 2023.

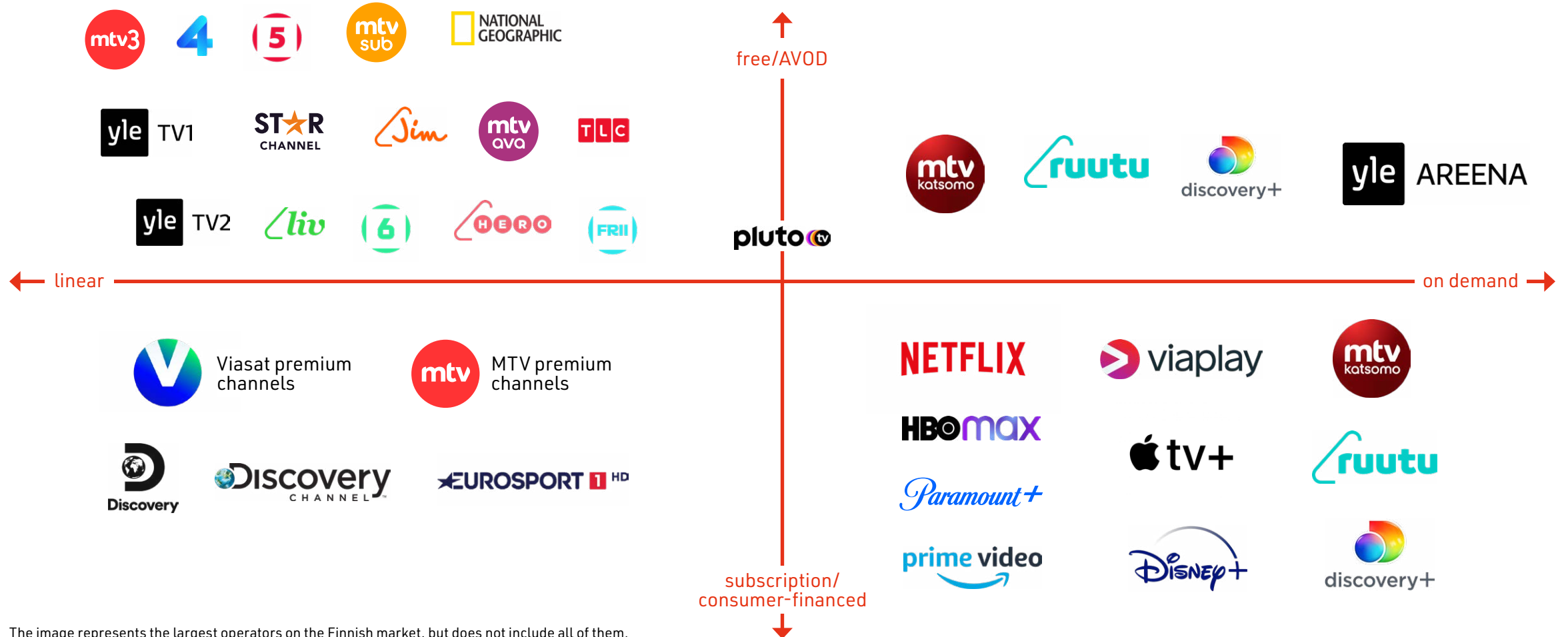
**FAST channel consumption & offering still limited:** Due, among other things, to the high-quality free content and age structure, consumption and supply of streaming channels consumed via the Internet that are similar to linear TV channels are still low in Finland.

\*Reach: Finland (Finnpanel), Denmark (TNS Gallup), Norway (TNS Gallup), Sweden (MMS). Other markets +3 years, Finland +4 years.

\*\*USA: Insider Intelligence 02/2023; Finland: Statistics Finland, population age structure 12/2022.

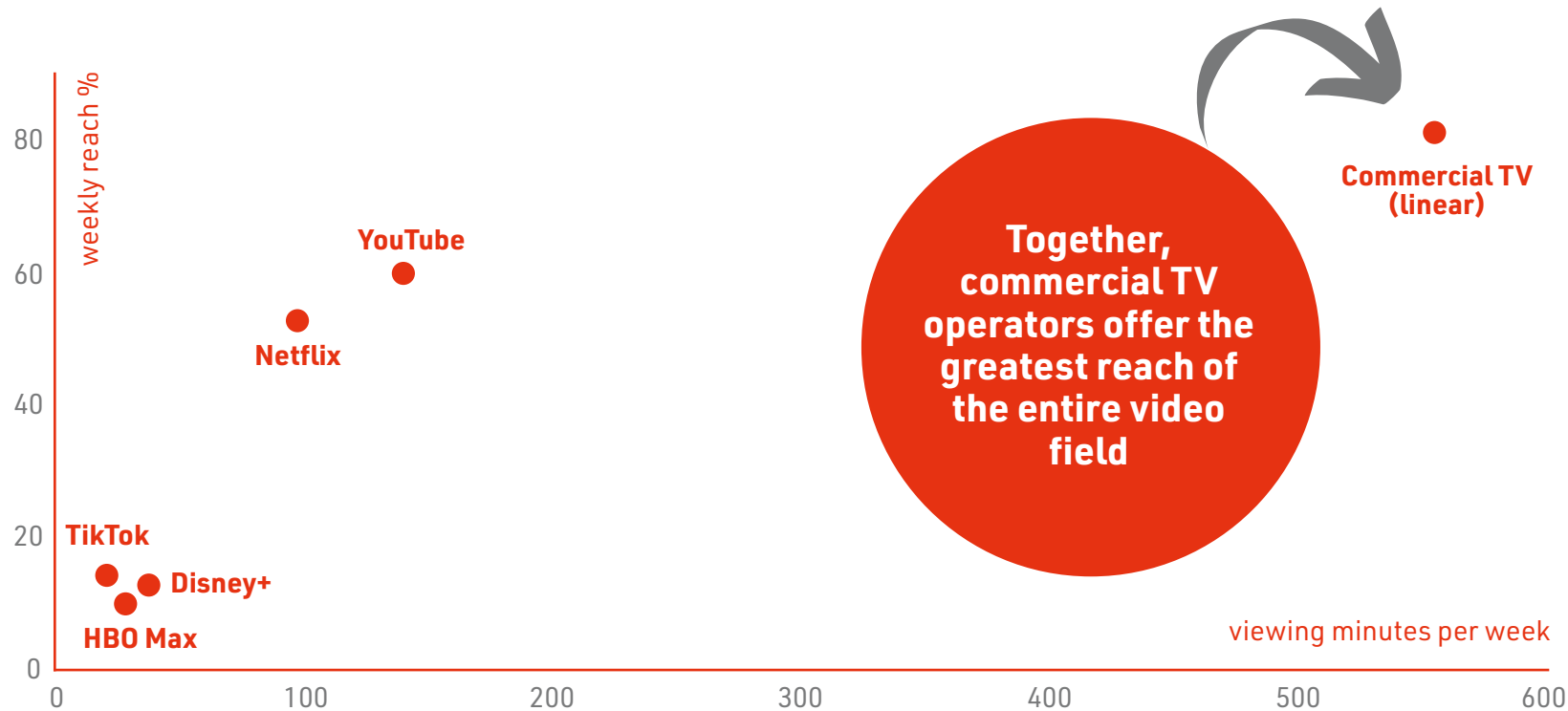


## Total TV market in Finland: Streaming service models in transition



The image represents the largest operators on the Finnish market, but does not include all of them.

## Average weekly reach and weekly viewing minutes 25–64 years



Ensitreffit alttarilla, MTV Oy

Source: Finnpanel; Total TV Measurement, weeks 36–52, 2023

Commercial TV (linear) = commercial TV channels of Nelonen Media, Disney, MTV and WBD

Note! The figures for international operators are based on viewing on the home network

## The commercial TV viewer enjoys an exceptionally good offering in Finland

Consumers want to consume programming at times that are most convenient for them, and therefore viewing is divided into multiple consumption instances.

Looking at the figures for a programme launch does not reveal the entire picture about the total audience of a programme. A programme's episodes also **get lots of views via the streaming service** and **reruns** after the premiere.

TV companies' **streaming services are more popular among younger** target groups. Reality TV is particularly appealing to young audiences.

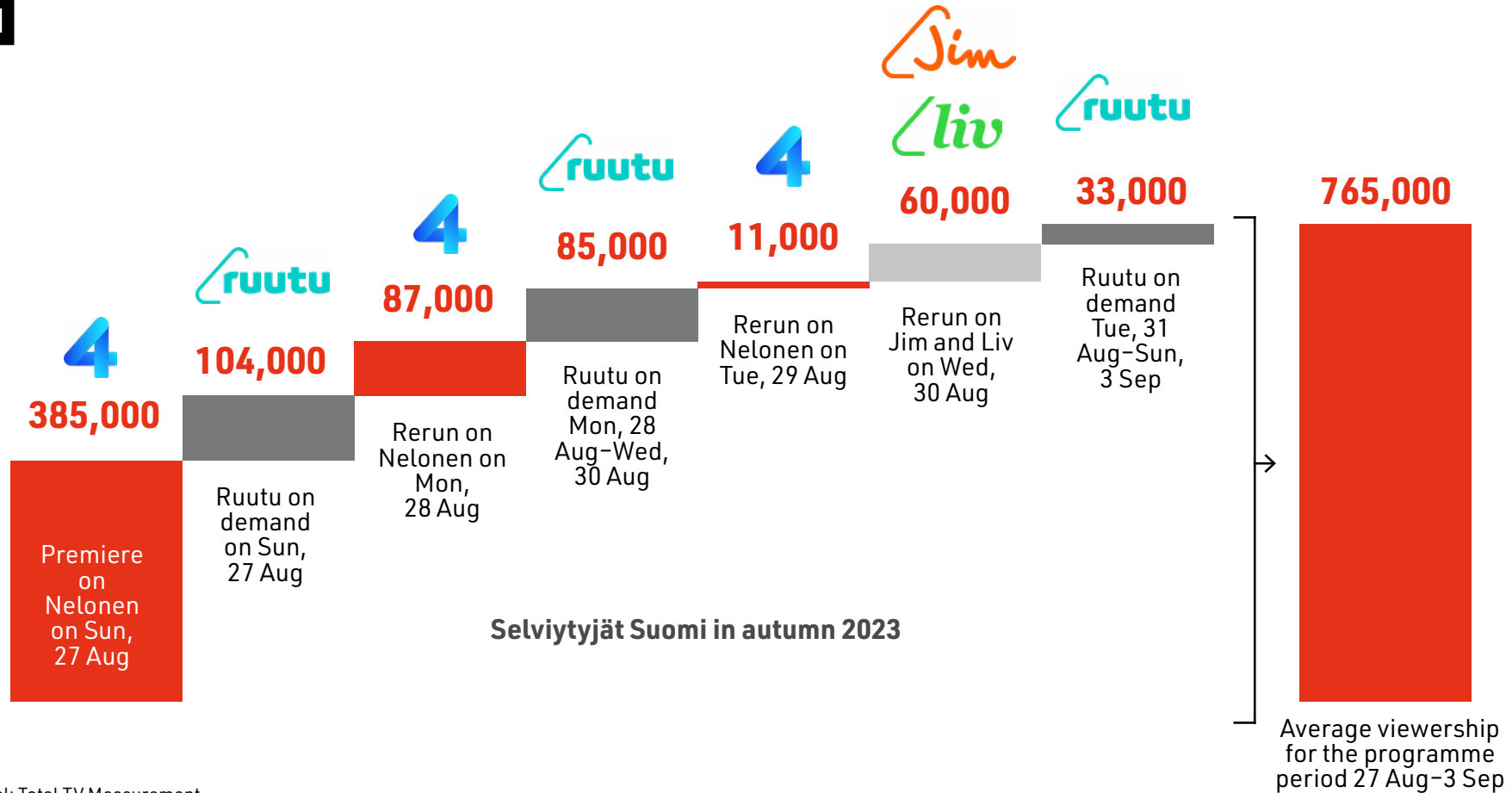
### Live events are particularly popular on linear TV.

For instance, when it comes to sports broadcasts, a significant number of will watch live TV.



## Average audience developement (an individual episode, 3+)

**s a n o m a**



(TK 7, episode 1) Source: Finnpanel; Total TV Measurement, Ruutu = Ruutu and Ruutu+

## The way in which programmes are viewed differs depending on the target group and genre of the programme



**Reality TV and drama** are streamed a lot, as streaming is the principal way of viewing for young people

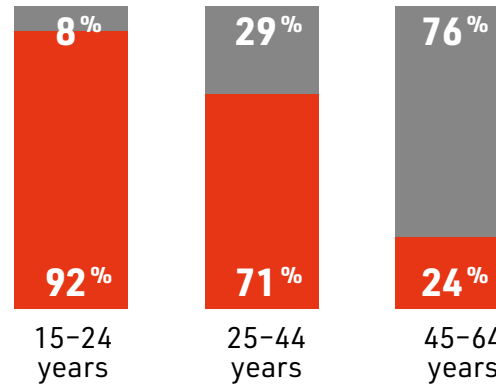


**Live entertainment and news** are still predominantly viewed on the TV channel.

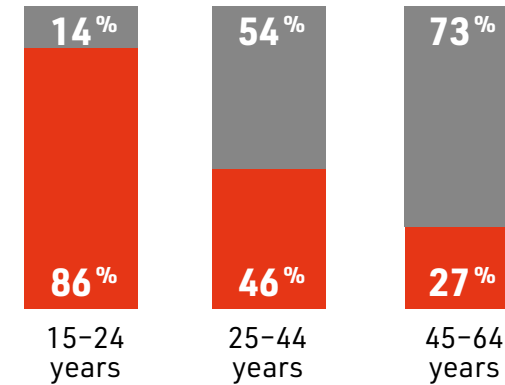


Source: Finnpanel Total TV Measurement, Love Island Suomi June–July 2023, other programmes September–October 2023.

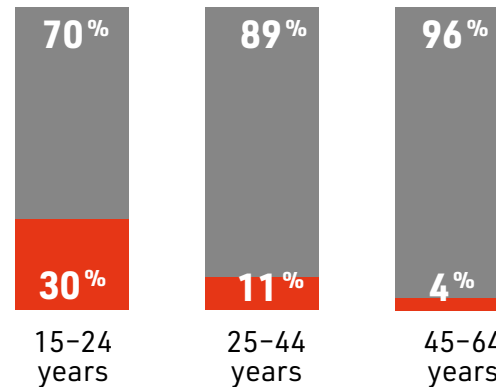
Love Island Suomi, season 4



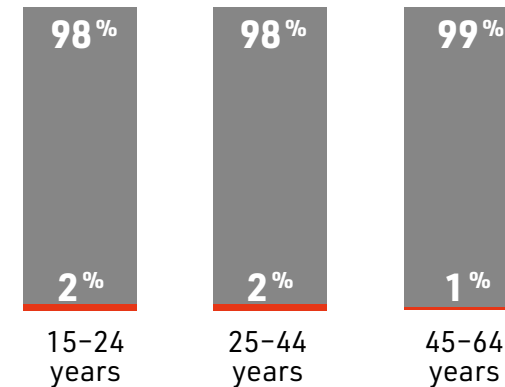
Salatut elämät, season 25



Tanssii tähtien kanssa, season 16



Kymmenen uutiset



MTV TV CHANNELS  
 MTV KATSOMO

## Live sports appeal to viewers



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5

**Ice Hockey U20  
World Championships  
Finland vs. USA match**

REACH:  
1.3 million

AVERAGE  
VIEWERSHIP:  
752,000

6

**World Snooker  
Championships  
Final match**

REACH:  
498,000

AVERAGE  
VIEWERSHIP:  
170,000

Finnpanel, TV Audience Measurement, 4+ Finns, 1 May 2023  
and 4 January 2024, reach of at least 3 min of continuous viewing





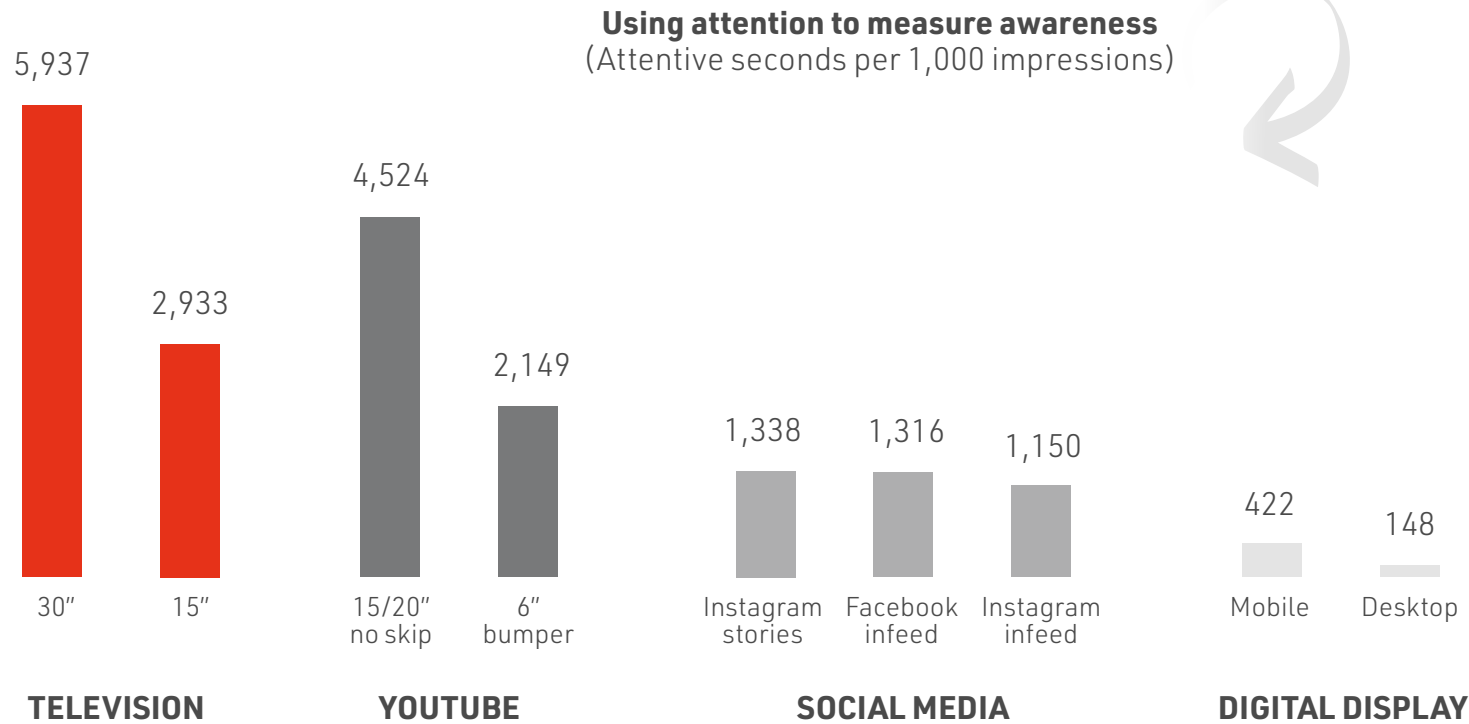
# TV ADVERTISING IS EFFICIENT AND RELIABLE



MTV-ALKUPERÄISSARJA

# POROMAFIA

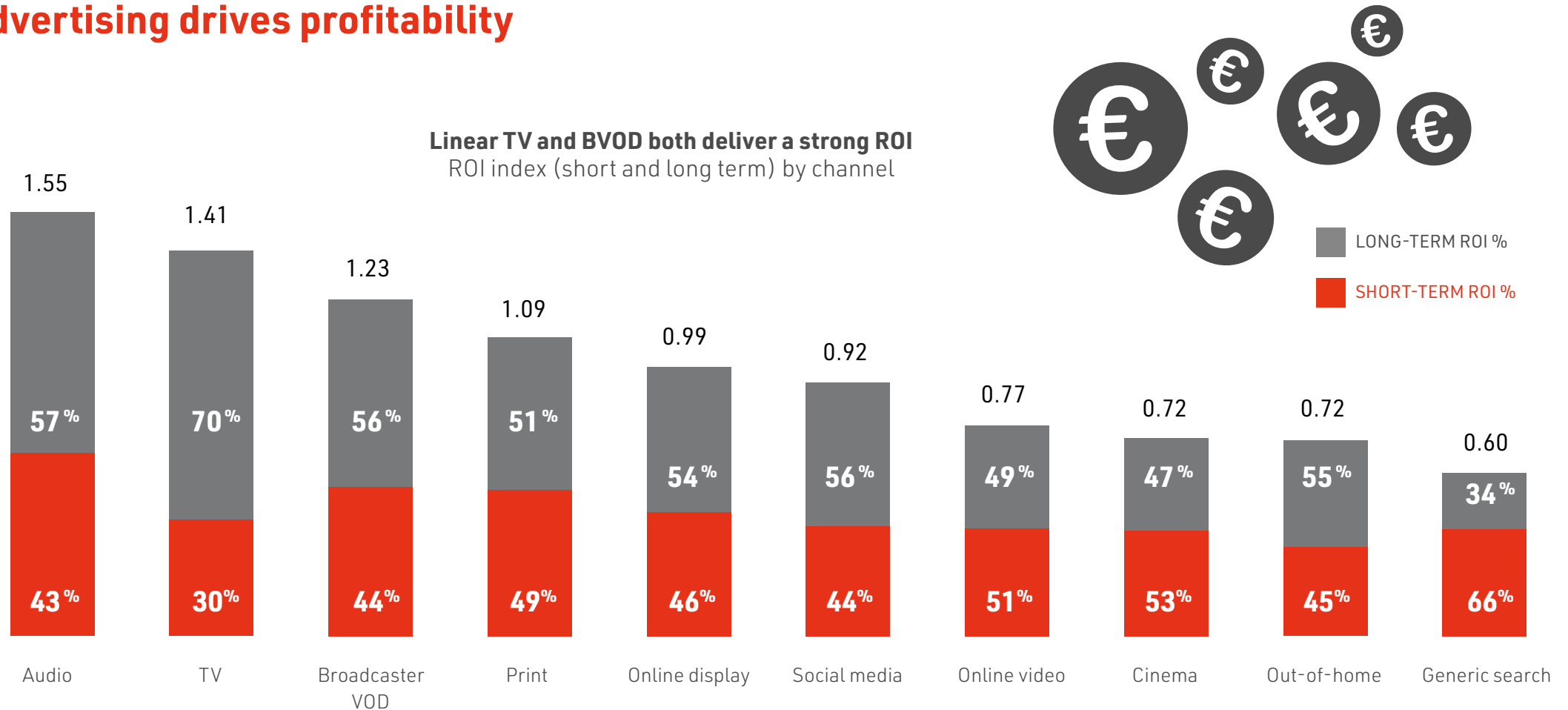
## TV advertising captures the viewer's attention and maintains it longer



Source: The Challenge of Attention; Ebiquity, Lumen, TVision and Dan White; 2021



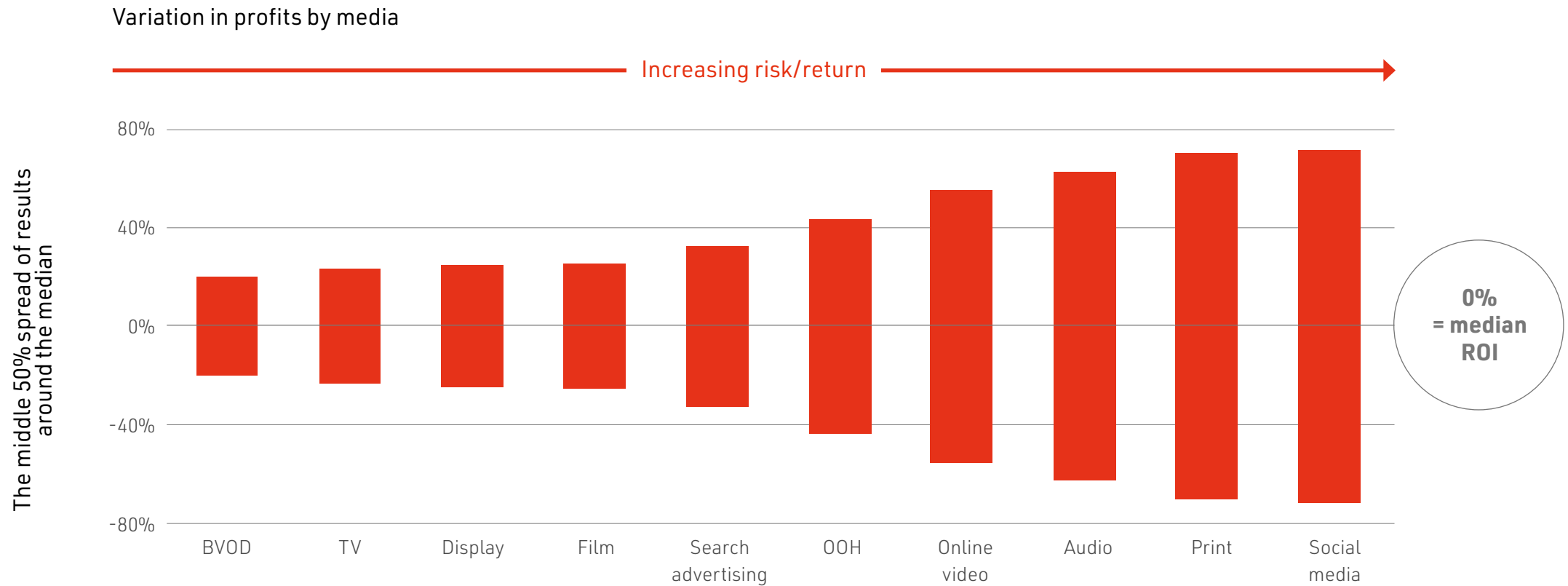
## TV advertising drives profitability



Source: Media Mix Navigator, 9/2022 EssenceMediacom/Wavemaker/Minshare/Gain Theory

As of 2018, Media Mix Navigator includes econometric data from Mediacom, Wavemaker, Gain Theory and Mindshare, incl. 52 brands, 14 product categories and 10 media channels, totalling around £2.2 billion worth of advertising investments.

## BVOD and TV are the least risky forms of video investment



Source: Media Mix Navigator, 9/2022 EssenceMediacom/Wavemaker/Minshare/Gain Theory

As of 2018, Media Mix Navigator includes econometric data from Mediacom, Wavemaker, Gain Theory and Mindshare, incl. 52 brands, 14 product categories and 10 media channels, totalling around £2.2 billion worth of advertising investments.

## Tips for smaller budgets

### A TV campaign does not always require a big budget:

- Optimise by targeting (regionality, strict target group)
- Maximum return on investment (off prime, seasonal benefits)
- Specialised solutions

### Studies show that:

- TV boosts the impact of other media by up to 54%\*
- The optimal media spread varies by industry, but TV should be the largest in most cases\*\*
- TV often accounts for 66% of the media budget for small brands but generates 80% of the sales generated by advertising\*\*

Source: \*Demand Generation, 2022, Mediacom/Wavemaker/Gain Theory ([thinkbox.tv/research/thinkbox-research/demand-generation](https://thinkbox.tv/research/thinkbox-research/demand-generation)).

\*\*As Seen on TV: supercharging your small business, Data2Decisions/Work/Thinkbox.

Data2Decisions database of smaller brands. All categories.

([thinkbox.tv/research/thinkbox-research/as-seen-on-tv-supercharging-your-small-business](https://thinkbox.tv/research/thinkbox-research/as-seen-on-tv-supercharging-your-small-business))



## TV advertising increases a brand's share of search

Share of search is used as an indicator when studying the market share, and it acts as a strong metric when measuring brand value.

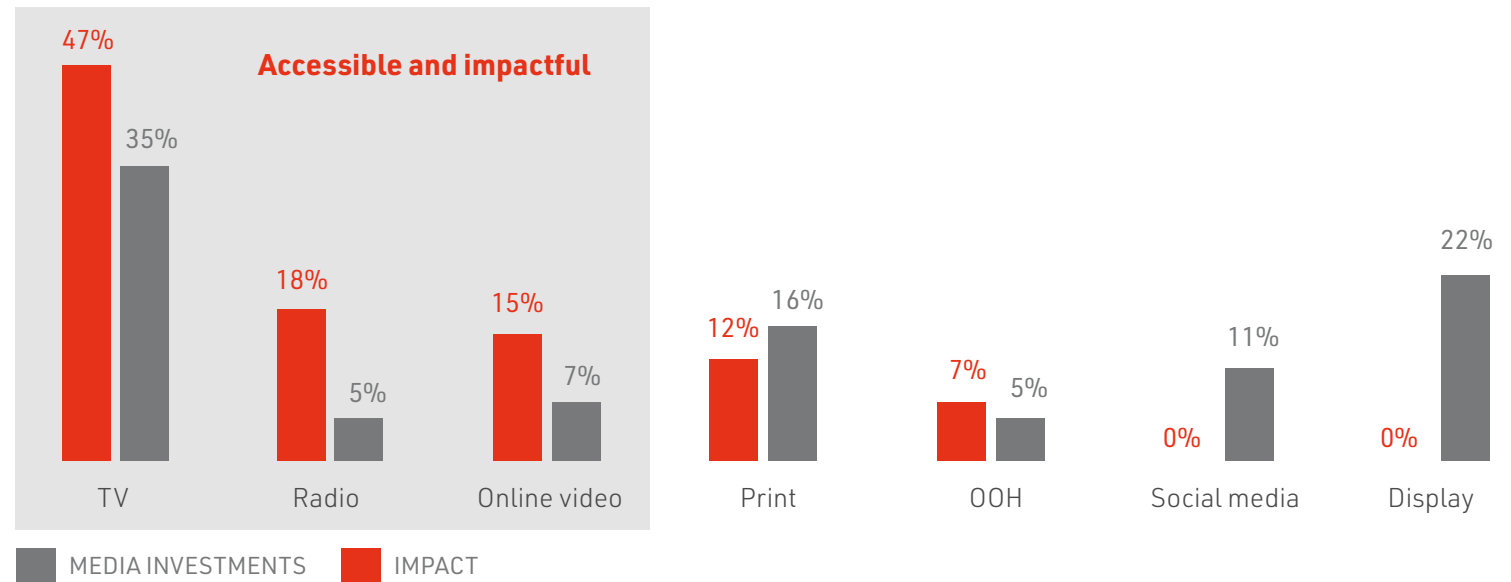
According to a study, advertising has a major impact on a brand's share of searches: when TV advertising investments grow, so increases the brand's share of web searches within its industry category.

### Increase in a brand's share of search



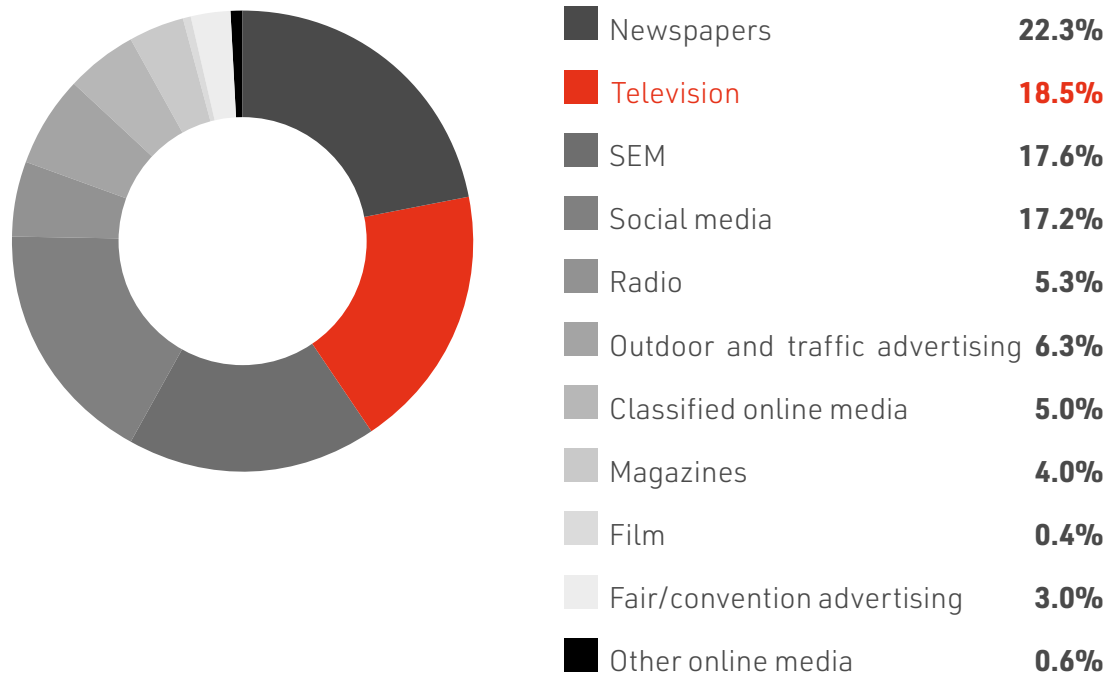
Source: Warner Bros. Discovery/Acceleration Nordic

### Most impactful advertising media when trying to increase share of search in the long term



Source: OMG Finland (commissioned by MTV); Case study: Case study: Medioiden vaikutus kategorian hakuosuuteen kolmella toimijalla. Long term = 1.5-4 years

## Share of media advertising per media group



## Industries that advertise the most on TV

1. Retail
2. Groceries
3. Medicinal products and other pharmaceutical products
4. Financial sector
5. Sports and recreation
6. Media and publishing
7. Health and beauty
8. Cars
9. Teleservices
10. Home accessories and cleaning products

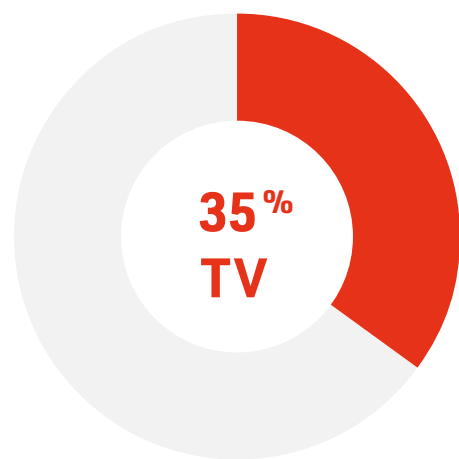
Spent on TV advertising

**247.2** million euros  
in 2023

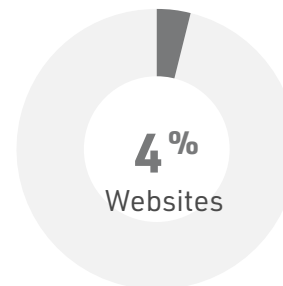
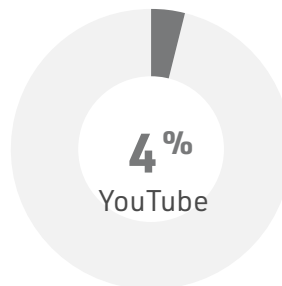
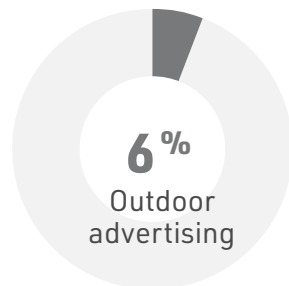
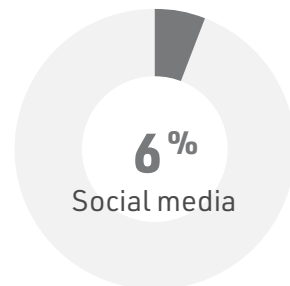
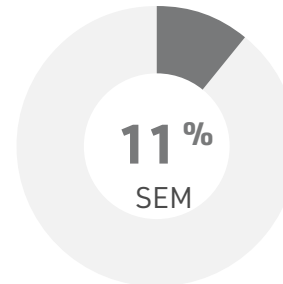
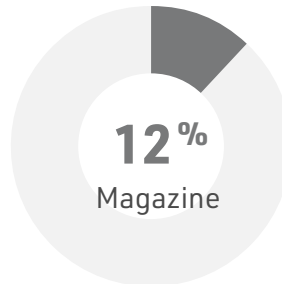
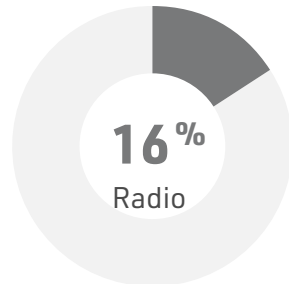
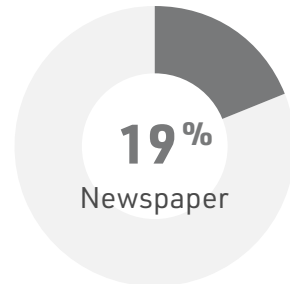
(total for all media advertising 1,335.9 billion euros)

## Consumers trust TV advertising

“Of the following, where are you most likely to find the most trustworthy advertising?”



TV advertising is considered to be the most trustworthy.



Half of EU citizens trust television as a medium.

**76%** of Finns trust television.

Source: EBU Media Intelligence Service – Trust in Media, 2022



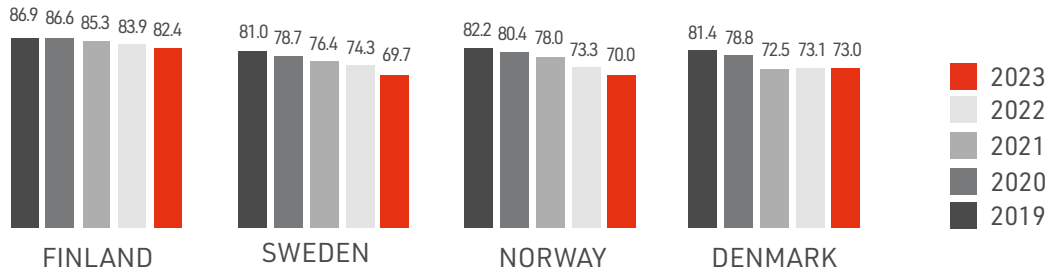
# FINLAND RANKS HIGH INTERNATIONALLY



## Finns watch the most TV in the Nordic countries

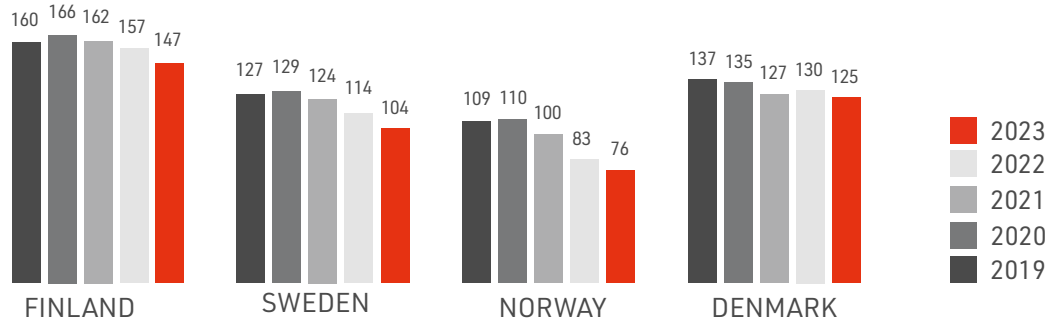
### TV weekly reach in Finland and other Nordic countries from 2019 to 2023

WEEKLY REACH %



### Daily TV viewing minutes in Finland and other Nordic countries from 2019 to 2023

DAILY VIEWING MINUTES



**Nordic comparison shows that the Finnish TV market has remained strong both in terms of reach and viewing minutes.**

**In addition, TV advertising is very competitively priced.**

Source: over 3 years of age; Finland (Finnpanel), Denmark (TNS Gallup), Norway (TNS Gallup Norway, Sweden (MMS)

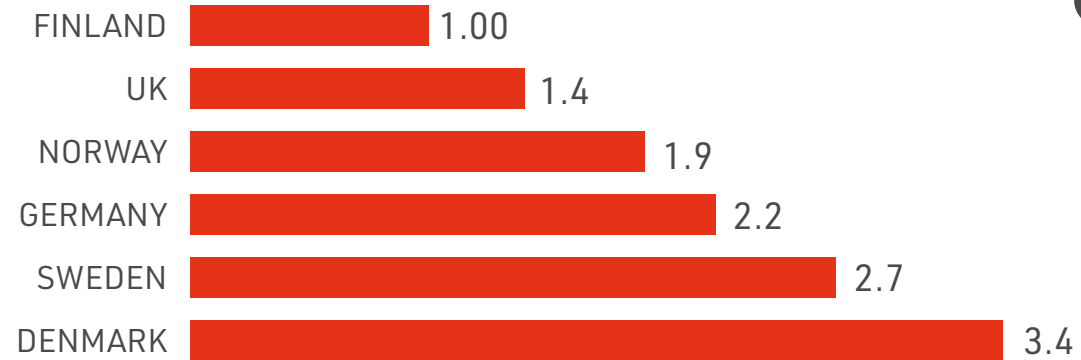




Amazing Race Suomi, Nelonen Media

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

CPT gross price index (Finland = 1.00)



Source: Dentsu 2/2024, CPT gross price comparison, 15+ and 25-49 years average



# VIIDAKON TÄHDET

## TV VIEWING AND ADVERTISEMENT MEASUREMENT

## Total TV advertisement measurement is developing

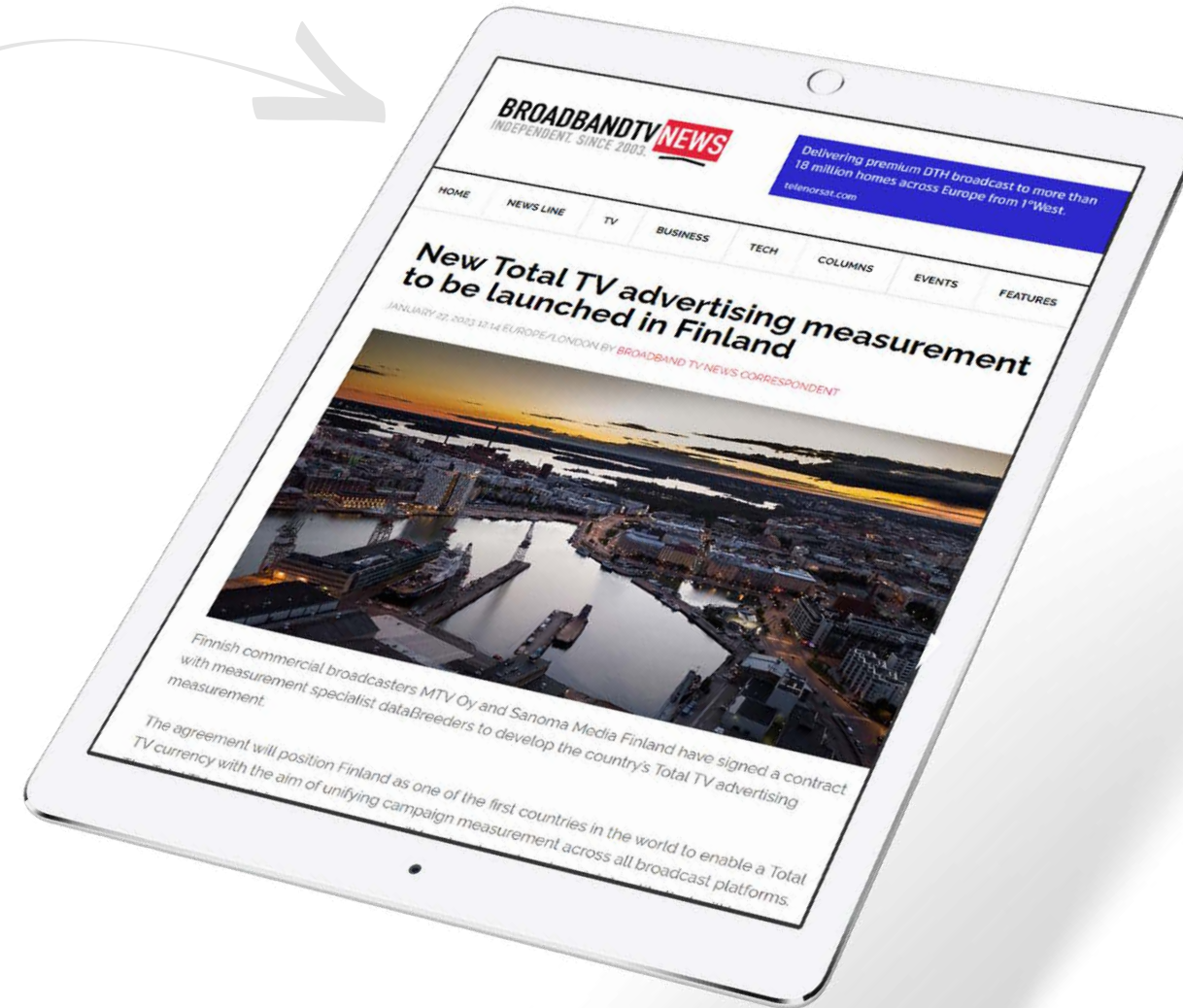
Finland is one of the leading countries in cross media measured TV and video advertising. The ways of viewing TV content are diversifying, and streaming services are becoming increasingly popular. The new Total TV advertising measurement gives those purchasing and selling advertising an overall view of the results of TV and streaming advertising campaigns. Cross media measurement, transparency and reliability enable the use of measurement also as an advertising currency.

Advertising measurement combining TV and streamed content provides a common benchmark for differently distributed advertisements (100% of which have been watched until the end). Video advertising contacts are generated daily in age and gender target groups, just like in TV advertising. In addition, reach and frequency figures are generated for advertisements and campaign packages, e.g. the net coverage of the entire campaign.

The measurement launch will be communicated later.

### WHAT THE ADVERTISER GETS:

- A transparent and reliable measurement method
- Unified metrics for Total TV campaigns:
  - TRP
  - Reach and frequency (in predefined target groups)
  - Net reach
- A common solution for the TV industry, based on common rules. Other operators also have the opportunity to participate.



## Total TV viewing measurement

Finnpanel measures **the audience for streaming services and programming** in Finland.

In Total TV measurement, viewing is measured on **all** devices.

The measurement **combines data** from the audience measurement panel families and TV company video measurement.

Read more about  
the measurements at  
[www.finnpanel.fi/en/](http://www.finnpanel.fi/en/)



1,000 households  
1,949 individuals  
1,420 televisions



1,870 smartphones  
1,480 computers  
640 tablets and 340 game consoles

**TV + Online TV = Total TV**

Source: Finnpanel Oy 2023, Total TV Measurement



“TELEVISION IS NOT DYING,  
IT’S HAVING BABIES!”

Lindsay Clay, CEO, Thinkbox

SCREEN  
FORCE  
THE MAGIC OF TV

#ScreenforceDay



Osallistu  
keskusteluun

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