

# COMMERCIAL TV IN FINLAND 2022

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



The Walt Disney Company

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# Finland one of the first countries to enable Total TV measurement



The way people watch TV is diversifying, and streaming services are becoming increasingly popular. This is why advertising measurement must also evolve. In 2022, Total TV\* measurement took a significant leap forward, when advertising measurement was developed alongside audience measurement.

Finland is one of the first countries in the world to enable a Total TV currency with the aim of unifying campaign measurement across all broadcast platforms. The new Total TV measurement will provide a common, transparent, and reliable benchmark for cross platform campaigns, and it is expected to be available to the market in 2023.

In addition to the soon available common advertising metrics, where Finland is leading the way, discussion around the value of attention and attentive seconds is growing. According to The Challenge of Attention study, both TV and video seem to be beneficial advertising platforms in terms of attention

## Television is powerful

Indeed, television is a powerful media, which reaches up to 84% of all Finns every week. Finnpanel's latest TV statistics show that Finns enjoyed watching TV in 2022: on average, people

watched 3 hours 37 minutes of TV a day, most of which (2h 38min) was spent watching TV channels. In today's world there is an ever more intense competition for time and attention. Television takes up an important share of the Finns' day and is still very much a mass media.

Although TV content is now watched on a wide range of devices, viewing on the big screen is also popular. The number of TV households and receivers in Finland has increased over the last ten years, and many people are investing in a good quality television.

According to Finnpanel's TV Households in Finland survey, 60% or around 1.5 million Finnish TV households own a smart TV. More than 1.2 million households (48% of all TV households) use Connected TV (CTV). With the increasing use of new devices and online TV, targeting is becoming easier and advertising opportunities more varied.

## Total TV makes up for a majority of Finns' media days

Finnish TV viewing is mainly live TV viewing. In addition, Finns are increasingly watching other content on their TV sets. Half of households now subscribe to paid content such as Netflix, and free streaming services are also widely used. Viewing

time on domestic streaming services increased by up to 20% in 2022. Today, linear TV and online TV viewing is referred to as Total TV viewing. The time or place is no longer the question for TV viewing.

Compared to many other countries, Finland also has an exceptionally high quality of free-to-air channels. There seems to be a particular demand for domestic content. Last year, programs such as World Cup hockey and olympic hockey, Huvila & Huussi, Maajussille morsian, Dancing with the Stars and Bachelor reached viewer numbers in the millions.

All in all, television in Finland is faring well. Although viewing between streaming services is fragmenting, the demand for domestic content and the quality of free-to-air offerings ensure that a majority of Finns' media consumption continues to be spent with Total TV content.

## Anna Lujanen

Executive Director  
Screenforce Finland

\* Total TV refers to video content on TV channels and online services, on all devices.

Sources: The Challenge of Attention; Ebiquity, Lumen, TVision and Dan White; 2021; TV Metrics Survey 2022, 4+; Finnpanel Oy; 2022



# Year 2022 in figures

**5.5M** Finns

**2.8M** Households

**2.5M** TV households



Daily TV viewing time



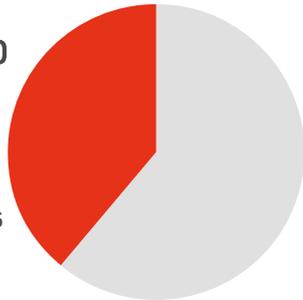
**84 %** watch TV on a weekly basis

The most popular TV genres are fiction and film



**39 %**

of time spent with media goes to **Total TV**



Spent on TV advertising



**255 M€**

(19.3% of all media advertising spending)

**15** commercial TV channels

TV advertising is the most trusted form of advertising



**53 %** of viewing is domestic content

**51 %** of all TV viewing is on commercial channels



**TV advertising offers the best ROI.**

All sources mentioned later in the report.



# LAND OF MILLIONS OF TELEVISIONS



# Finland is a TV nation

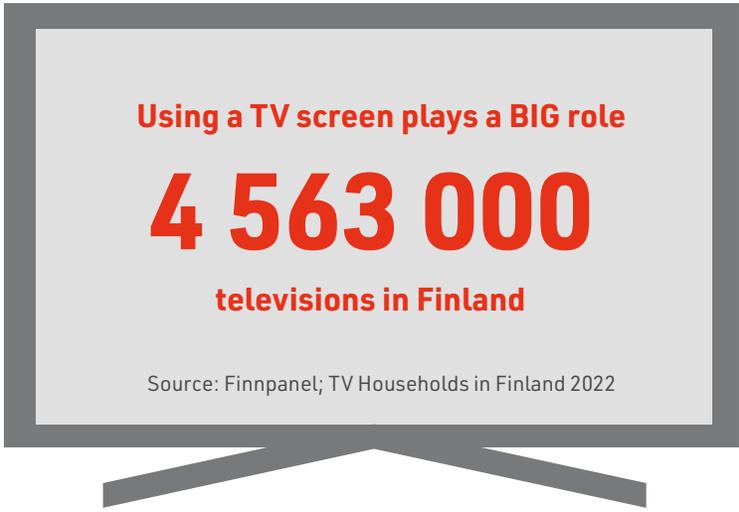
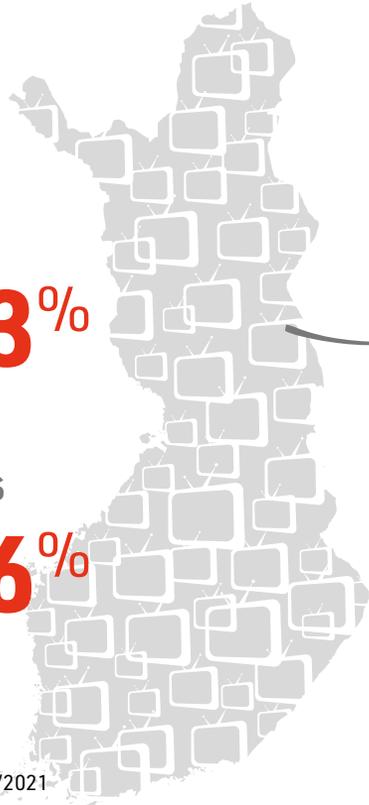
Television is a mass media providing content on all screen devices. TV is defined by its content, not the device it's viewed on.

## High device penetration

Percentage of TV households in Finland **93%**

## Unlimited internet access

Percentage of households with Internet connection\* **96%**

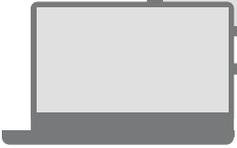


## TV households also have many other devices

Tablets in **53%** of households



Computer in **87%** of households



Smartphone in **92%** of households

Source: Finnpanel; TV Households in Finland 2/2022 and 4/2021

Source: Finnpanel; TV Households in Finland 2022



## More than 1.2 million households use a smart TV connected to the Internet

### Hybrid TV enlivens the TV viewing experience

Hybrid TV enhances your viewing experience by bringing Internet's interactive features to your television. It enables viewers to import graphics and functionality on top of their TV picture. This means that by using inclusive hybrid TV services, viewers and advertisers can become a part of the programs.

Source: Digita Oy

### Is there a Hybrid TV in your household? (% TV households in Finland)

Source: Finnpanel; TV Households in Finland 2/2022, n=3 274



YES	19%
I DON'T KNOW	9%
NO REPLY	17%
NO	55%

### Hybrid TV usage is increasing

SMART TV

1 530 000

HYBRID TV

490 000

SMART TV  
ONLINE

1 220 000

HYBRID TV  
ONLINE

430 000

Source: Finnpanel; TV Households in Finland 2/2022

### TV transmission platforms in Finland

CABLE



TERRESTRIAL



IP-TV



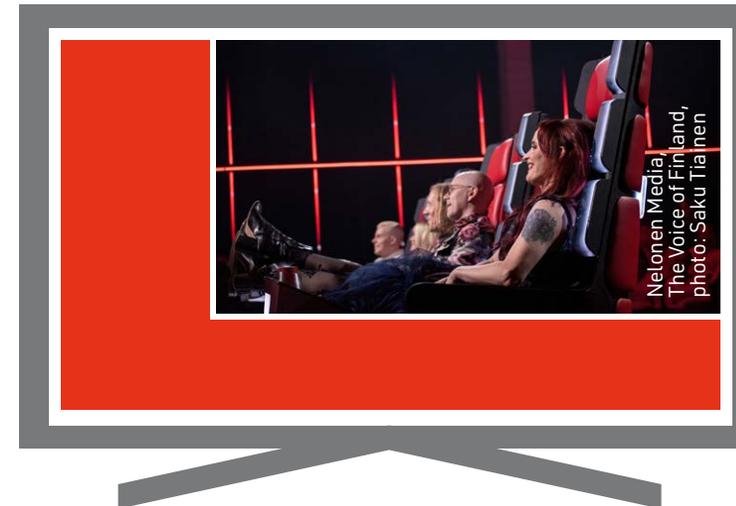
SATELLITE



Source: Finnpanel; TV Households in Finland 2/2022

### Antenna or cable TV

from the internet are added to the broadcast on a certain channel at the desired time.



### Online TV

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



# TELEVISION IS A POPULAR PASTIME IN FINLAND

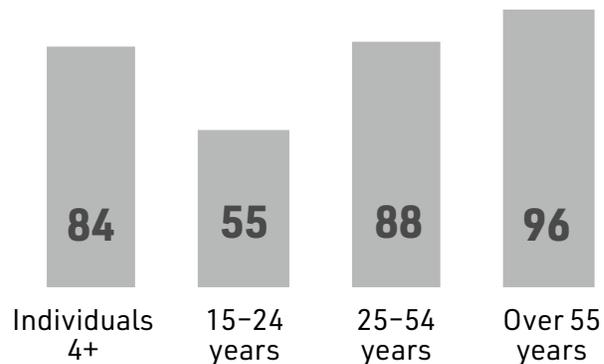




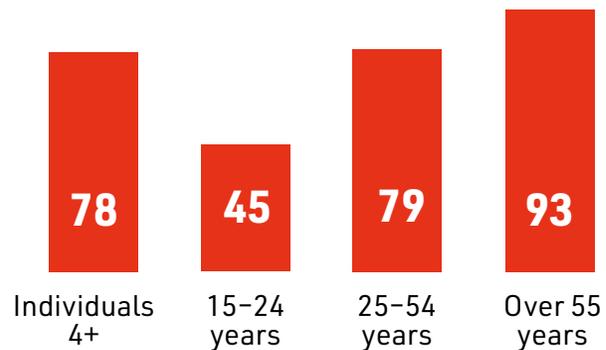
**Television reaches 4.5 million Finns every week**

### TV weekly reach across age groups, %

#### TV in total



#### Commercial TV channels



**63%**  
of Finns watch TV daily and

**84%**  
weekly

Source: Finnpanel;  
TV Audience Measurement 2022

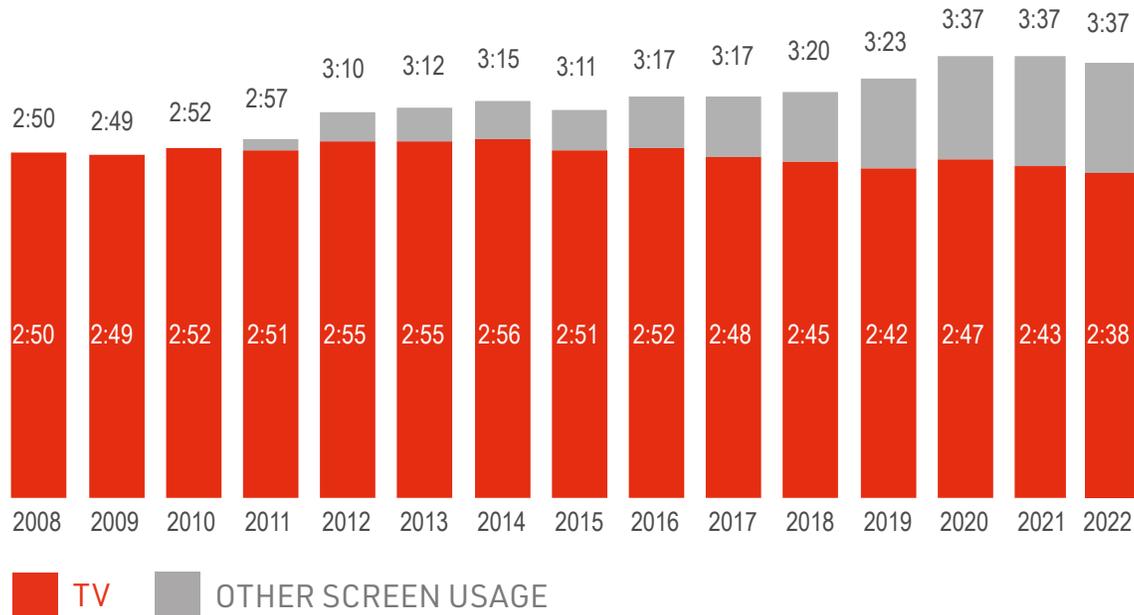


MTV, Yökylässä Maria Veitola, MTV Oy



## Time spent with the TV screen is increasing

Time spent viewing TV on different screens, h:min



**TV + Online TV = Total TV**

More on Total TV measurement on page 27-28.

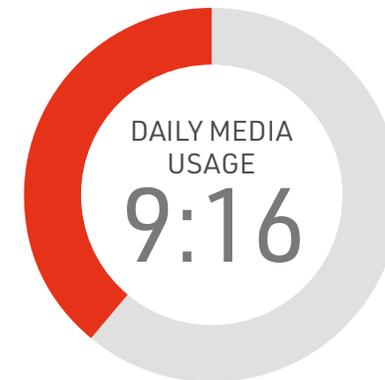


Daily TV viewing is **2 h 38 min**

Source: Finnpanel; TV Audience Measurement 2022 (over 4 years of age). Other screen usage includes i.e. streaming services, old recorded content, gaming and DVD/BluRay viewing.



Total TV takes up **39%** of daily media usage



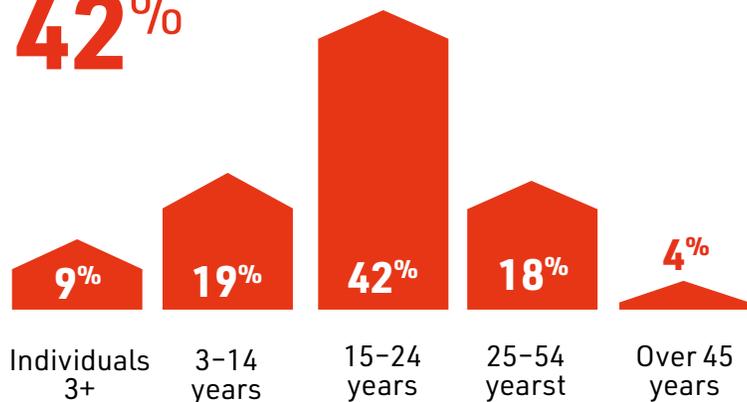
TOTAL TV 39%  
OTHER MEDIA 61%

Source: Kantar; Mind 2021, 15-74-year-olds streaming  
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

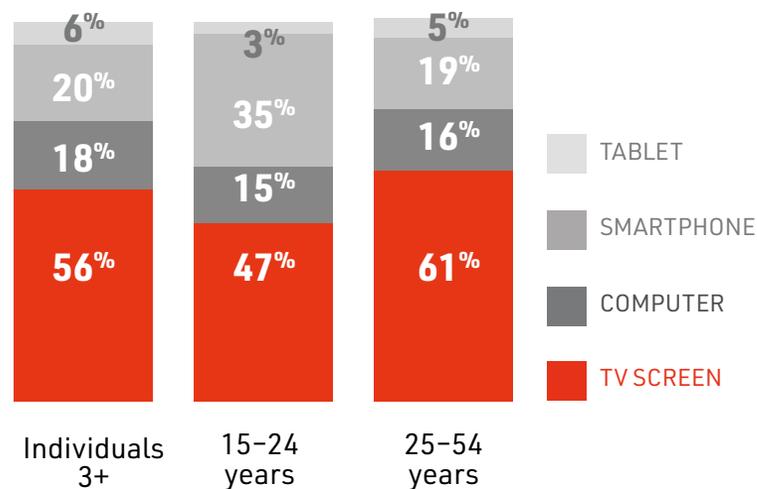
# 42%



Source: Finnpanel; TV Audience Measurement, 2022; Finnpanel; Total TV measurement (over 3 years old), 2022. TV viewing on MTV, YLE and Sanoma channels. Online viewiing (VOD + simulcast) for tagged players (Yle Areena, MTV-palvelu & C More- and Ruutu & Ruutu+).

## Online viewing per device

Percentage of viewing time



Source: Finnpanel; Total TV measurement 2022

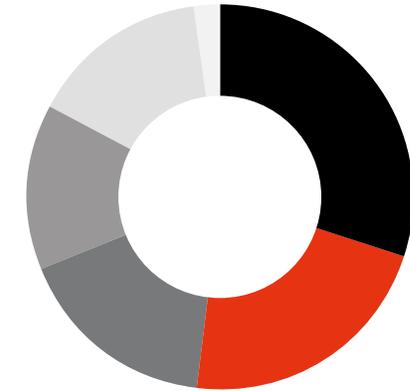




## Most watched TV genres in Finland in 2022

(% of viewing)

Series and film	30%	
News and current affair	22%	
Entertainment and reality TV	17%	
Sports	15%	
Documentary and lifestyle	14%	
Children's programming	2%	



Source: Finnpanel; TV Audience Measurement 2022

**53%**  
of all viewing is  
local content





# COMMERCIAL TV ENTERTAINS AND INSPIRES



# There are more than 15 commercial TV channels in Finland

## Online services



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The WALT DISNEY Company





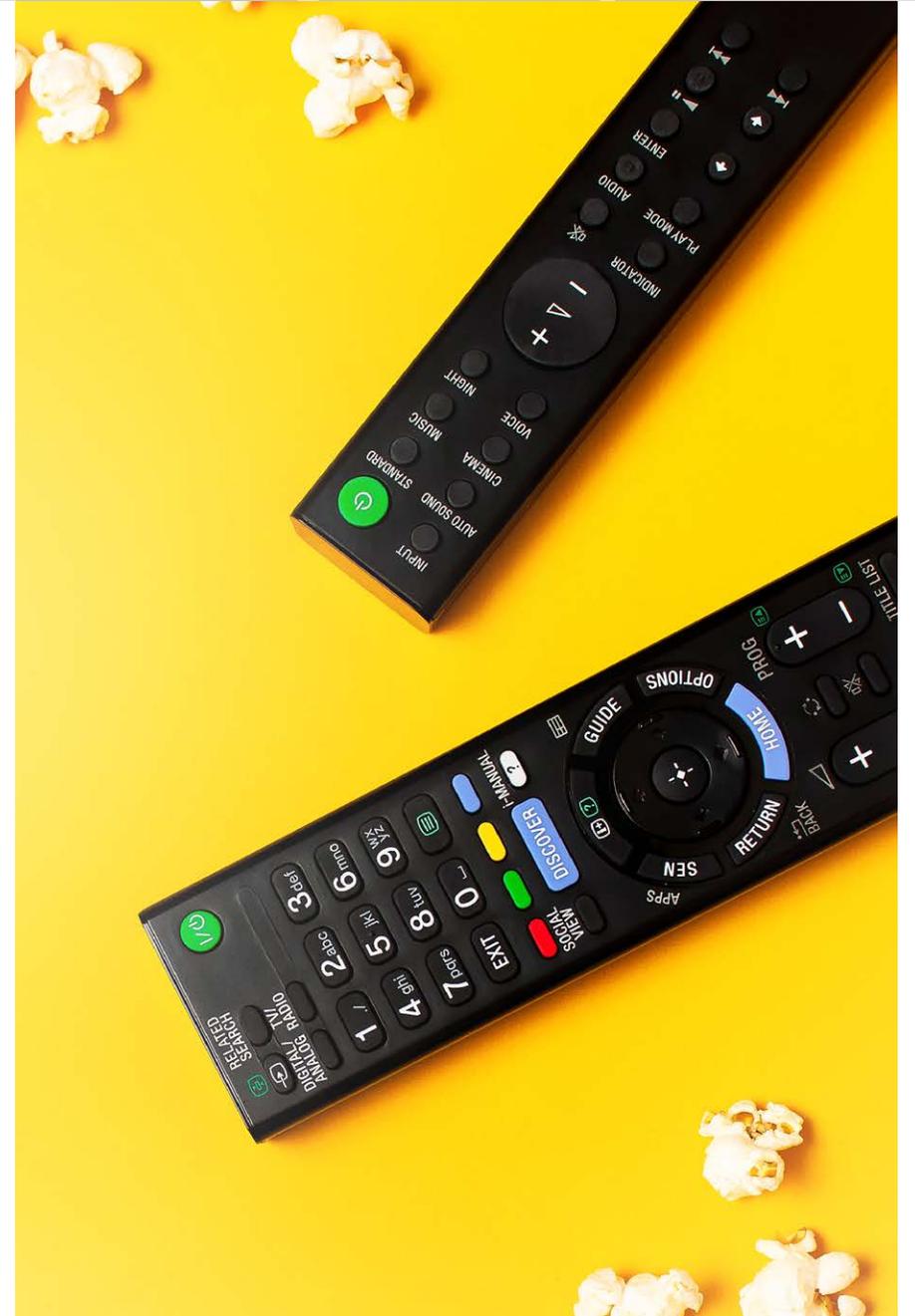
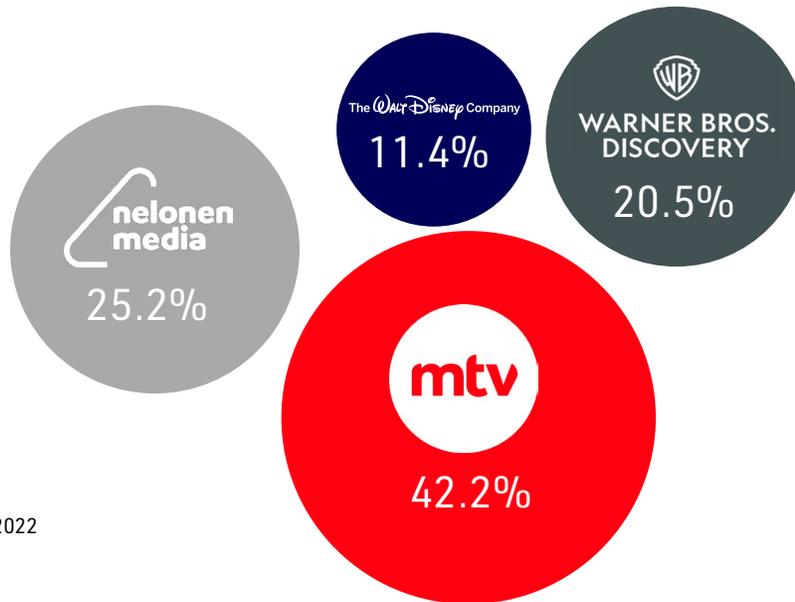
Share of commercial TV viewing

51%

Source: Finnpanel,  
TV Audience Measurement 2022

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

Source: Finnpanel; TV Audience Measurement 2022

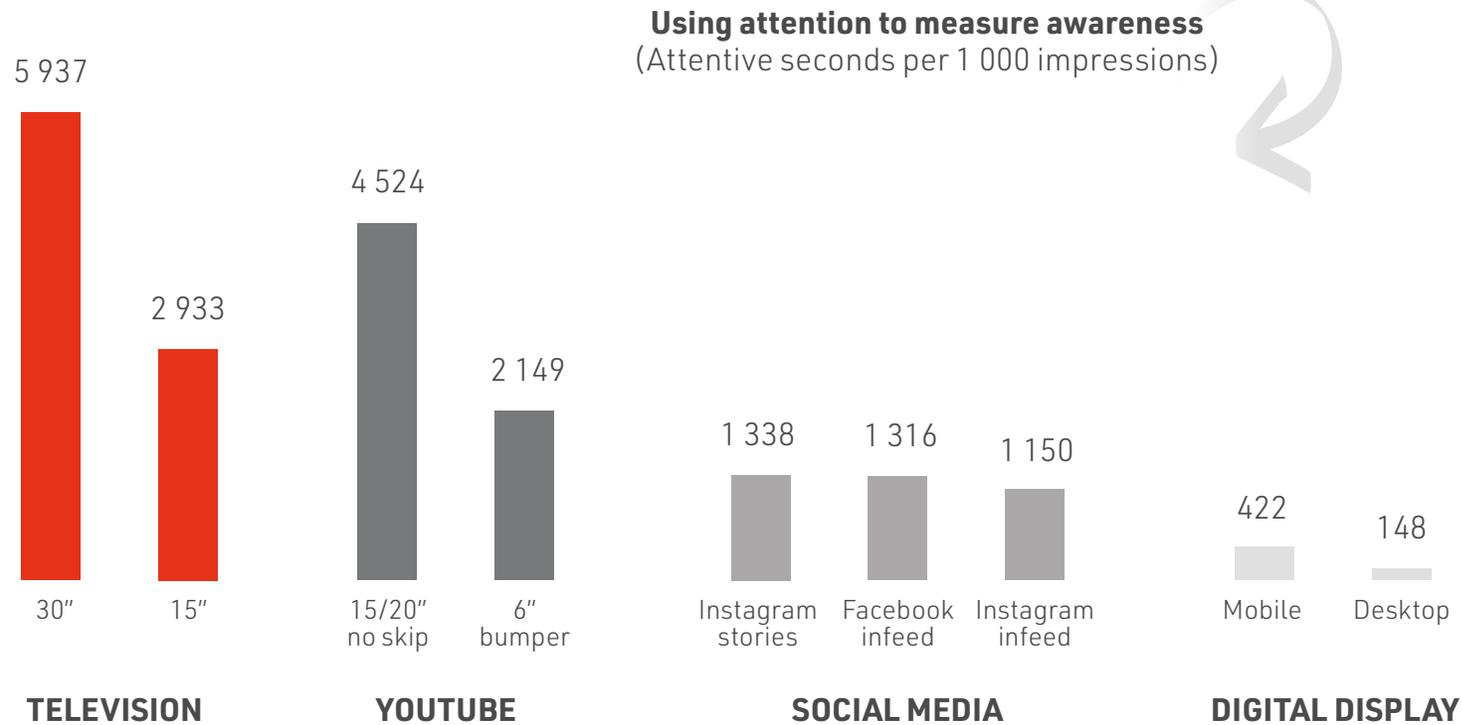




# TV ADVERTISING IS EFFICIENT AND RELIABLE



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

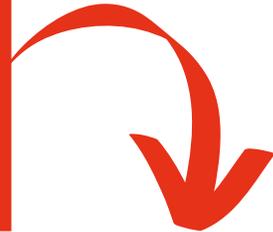


Source: Ebiquity, Lumen, TVision and Dan White; The Challenge of Attention, 2021

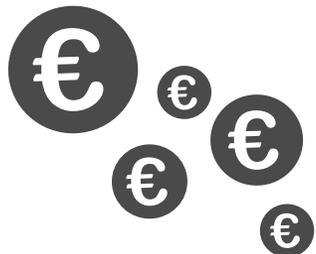


## TV advertising has the best return on investment

Television offers the best ROI on all devices, and it outperforms even online video platforms.



Sales impact across media platforms (STAS\*)



	TV	Desktop	Mobile
<b>Television</b>	<b>144</b>	<b>153</b>	<b>161</b>
Facebook	-	118	121
YouTube	-	116	137

\*STAS (Short Term Advertising Strength) score measures the effect of advertising, i.e. whether those exposed to advertising buy the product more than those who have not been exposed. More than 100 points means that advertising has had an impact on sales.

Source: ThinkTV, Australia, Karen Nelson Field; Amplified Intelligence – Not All Reach is Equal: An Investigation into Cross Platform Advertising Effectiveness, 2019

## TV advertising increases brands share of search

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

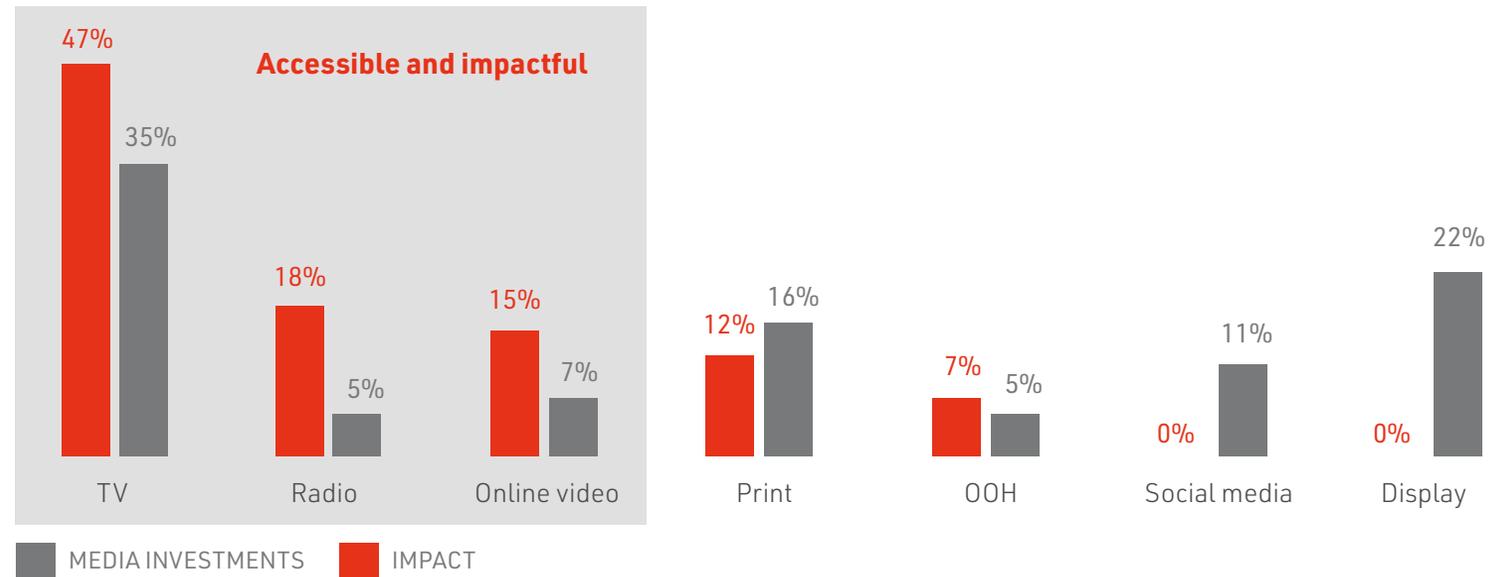
According to a study advertising has a huge impact on a brand's share of search: when TV advertising investments grow, also the brand's share of web searches within its industry category increase.

Increase in brand search share (%) in different industry categories after investments in TV advertising.



Source: Warner Bros. Discovery / Acceleration Nordic

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

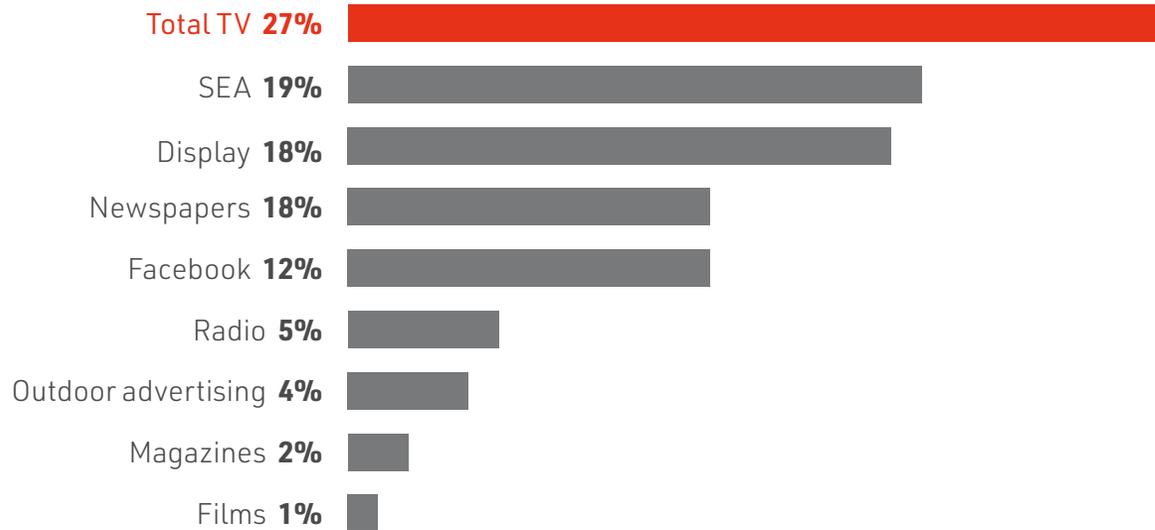


Source: OMG Finland (commissioned by MTV); Case study: Medioiden vaikutus kategorian hakuosuuteen kolmella toimijalla, long term study: 1.5-4 years

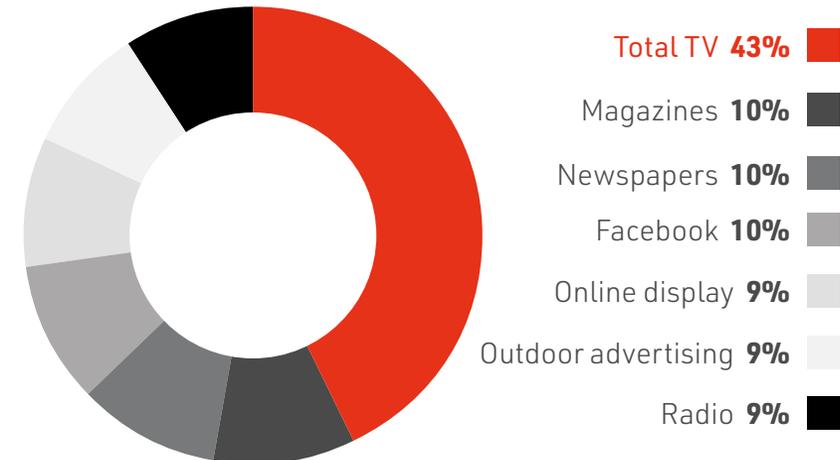


## Total TV gives a boost to your sales and brand equity

### Direct additional sales of media advertising in Finland 1 day – 3 months

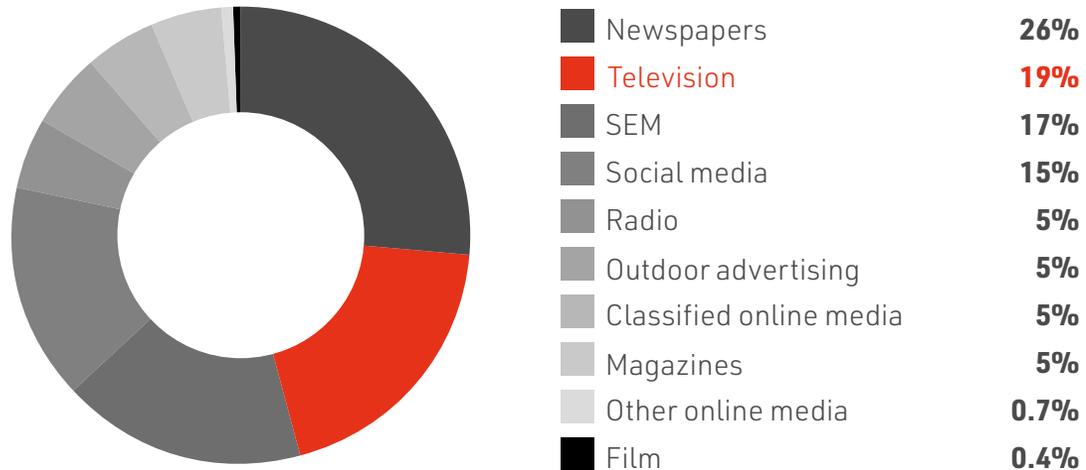


### Media-specific impact on brand equity



Sources: Dagmar (commissioned by MTV); Meta-analysis of econometric modeling in Finland (The modeling includes 59 brands, 95 models, EUR 200 million in media investments in 2016–2020. Short term: 0–3 months.) and Kantar Millward Brown; 2019

## Share of media advertising per media group



Source: Kantar; Media advertising expenditure, 2022

## Industries that advertise the most on TV

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

Source: Kantar; Media advertising expenditure, 2022



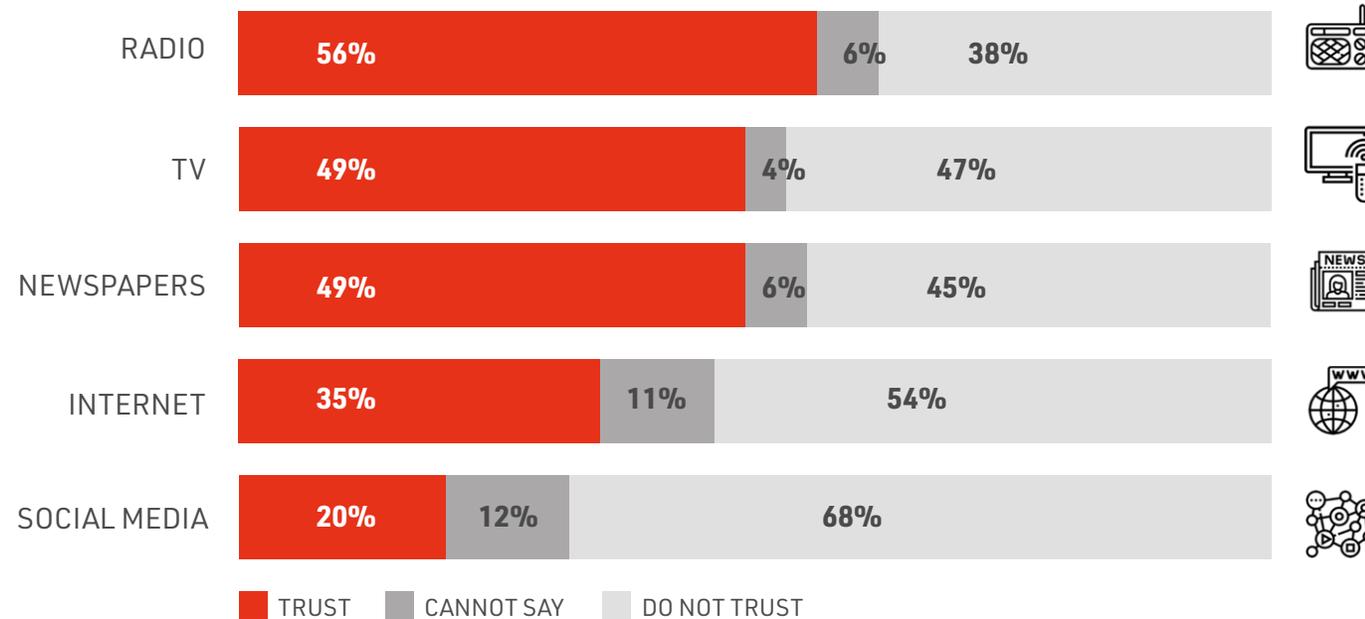
**EUR 255 million** used for television advertising in 2022  
(total EUR 1 328 million for all media advertising)

Source: Kantar; Media advertising expenditure, 2022

## TV is a trusted media

### Trust in media in the EU

% of population, 2022



MTV, Posse, photo: Numi Nummelin

Half of EU citizens trust television as a medium.

76% of Finns trust television.

Source: EBU; Media Intelligence Service - Trust in Media, 2022



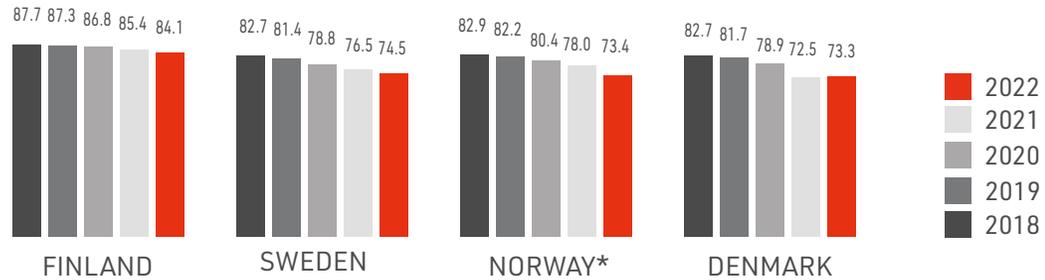
# FINLAND RANKS HIGH INTERNATIONALLY



## Finns watch the most TV in the Nordic countries

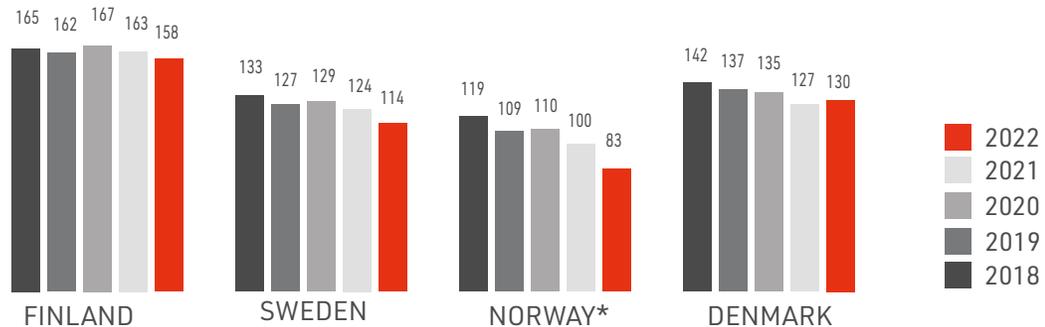
### TV weekly reach in Finland and other Nordic countries from 2018 to 2022

WEEKLY REACH %



### Daily TV viewing minutes in Finland and other Nordic countries from 2018 to 2022

DAILY VIEWING MINUTES



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

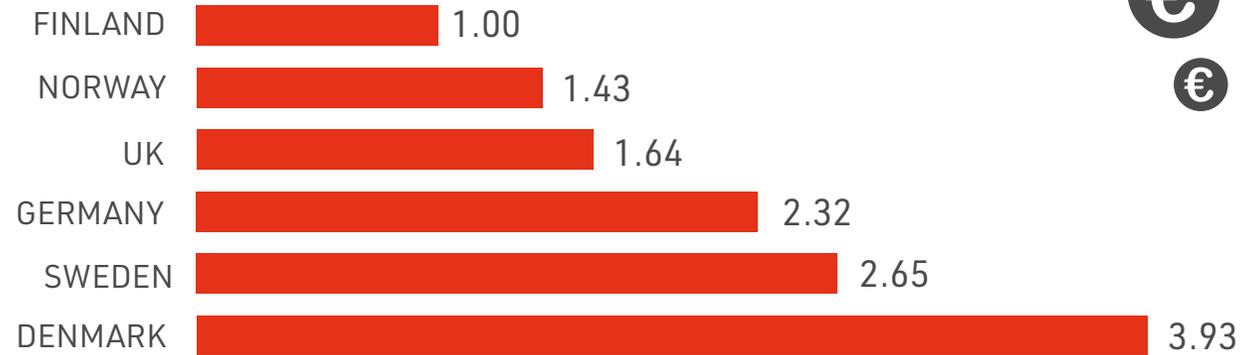
**In addition, TV advertising is very competitively priced.**

Source: Finnpanel (Finland), over 4 years of age; TND Gallup (Denmark and Norway), over 3 years of age; and MMS (Sweden), over 3 years of age.

\*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; CPT gross price comparison. Prices calculated by natural viewing. 12/2023





# FINNISH BROADCASTERS TAKE THE LEAD ON TOTAL TV CAMPAIGN MEASUREMENT



## Total TV advertising measurement – TTVAM

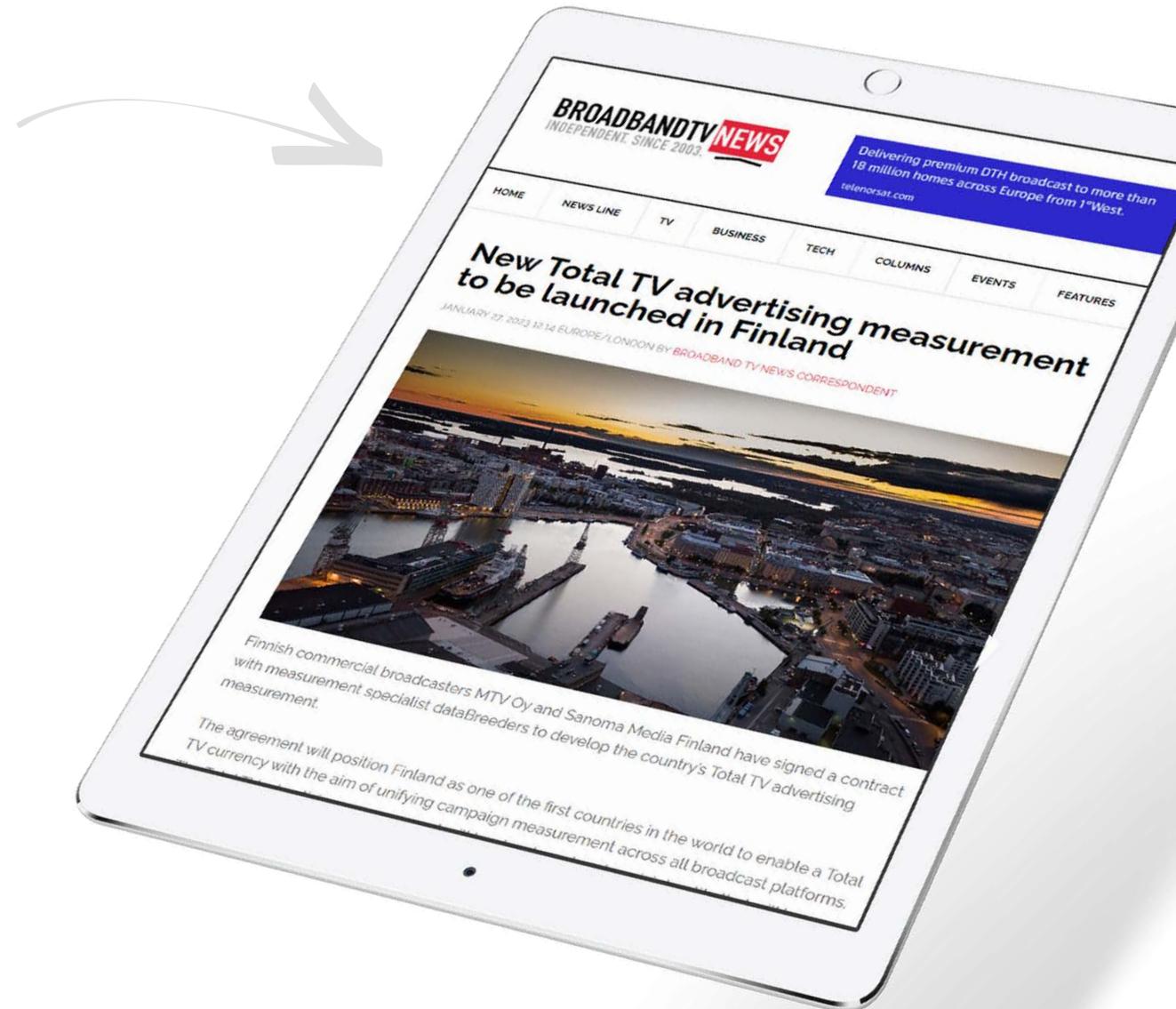
The ways of viewing TV content are diversifying, and streaming services are becoming increasingly popular. As one of the first countries in the World, Finland will enable a Total TV currency with the aim of unifying campaign measurement across all broadcast platforms. Advertising measurement combining 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. Reach and repetition figures such as net coverage are produced for individual ads as well as ad campaigns.

The Total TV advertising measurement and currency is developed under a joint entity that is governed by commercial broadcasters in Finland (MTV, Sanoma and Warner Bros. Discovery).

It is expected to be available to the market in 2023.

### 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 (across different BVOD and linear services)
- A common solution and common ground rules for the TV industry., Other operators also have an opportunity to join the initiative.



## 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 peoplemeter panel families, and video measurement from TV companies.



1 000 households  
2 000 individuals  
1 440 televisions



1 830 smartphones  
1 470 computers  
650 tablets and 290 game consoles

**TV + Online TV = Total TV**

Source: Finnpanel; TV Audience Measurement and Finnpanel; Total TV Measurement



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