

**SCREEN  
FORCE**  
THE MAGIC OF TV

**COMMERCIAL TV  
IN FINLAND  
2025**

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



The **WALT DISNEY** Company

**s a n o m a**







## FOREWORD

## Shared moments on commercial TV –where impact meets trust

In 2025, people in Finland spent about 3.5 hours a day watching television. Total viewing time is the same as a year earlier, but habits differ clearly between age groups. Commercial TV reaches more than half of the population aged 3+ every day. This is the level of reach that builds visibility, awareness and real impact.

Video viewing now takes place across many platforms, yet the basic pattern holds: most viewing still happens on the big screen. Mobile and other devices are a natural part of everyday life, especially for younger audiences. In this landscape, content from Finnish media companies plays an important role. It resonates with people, creates shared experiences and a sense of community, while international services continue to grow alongside it.

## Television at the heart of shared culture and public trust

Culture is not a momentary spark. It builds gradually, spreads, stays with us and keeps returning in new forms. Television continues to play a central role in Finnish media culture because it brings people together. The most popular entertainment shows, news programmes and major live broadcasts still create rare moments when large audiences share the same experience at the same time.

2025 was a politically significant year, and global events were clearly reflected in media consumption. Uncertainty in world politics was visible in audience data as increased interest in television news and other socially relevant content.

In this sense, television still works as a shared public space where national conversations take shape and important moments are experienced collectively. Even though everyday viewing habits have become more fragmented, major events and live broadcasts continue to draw people to the same moment, often in real time.

## How media choices shape trust

We live in an environment where misinformation, scams and low-quality content are increasingly common. In this context, the role of trusted media becomes more important than ever, especially when it comes to advertising effectiveness.

Commercial television operates within a regulated and transparent framework. Strong editorial standards and professional content creation provide a trusted environment that also strengthens the impact of

advertising. When a brand appears on television, it is seen in a context that audiences are generally inclined to trust.

By contrast, brands may also appear in environments where misleading or harmful content can weaken credibility and reduce the effectiveness of communication. Media choice is therefore a strategic decision. The environment in which a message is seen directly influences how it is received, remembered and what kind of impression it leaves.

## Why television remains a powerful tool for marketers

From a marketer's point of view, it is essential to understand how reach, attention and repetition work together. Unfortunately, 85 percent of digital advertising receives less than 2.5 seconds of attention, which research shows is not enough to create lasting memory.

Television combines broad reach with a strong attention environment, while other channels complement it through targeting and activation. Television acts as the engine that builds awareness and strengthens the performance of all other channels. Screenforce Finland helps marketers understand this broader media mix by bringing in the latest research and insights.

Our role as an industry is to make sure this bigger picture is understood, and its full potential is realised. Commercial television remains a key part of the Finnish media landscape and an essential driver of effective marketing. It is these shared viewing moments that make it irreplaceable.

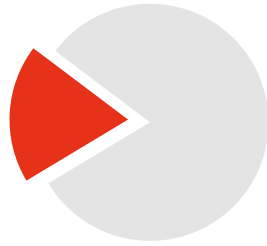
**Anna Lujanen**

Executive Director, Screenforce Finland

## Year 2025 in figures

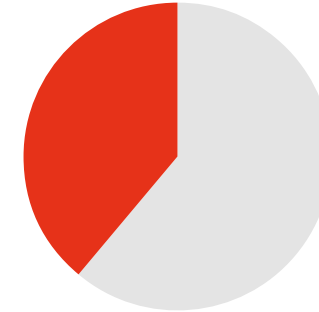
**2h 16min**

Daily TV  
viewing



**80%**  
watch TV  
on a weekly  
basis

**36%**  
of total media  
time is spent  
with **Total TV**



TV advertising  
has the highest  
**recall.**

TV advertising is  
the **most trusted**  
form of advertising

**56%**

of viewing  
is domestic  
content

**2.6M**

TV households

5,6 M Finns  
2,8 M households

TV advertising  
spend

**246.8 M€**

(19.6% of all media  
advertising spend)

Digital TV  
ad spend grew

**7.0%**

In 2025 vs. the  
previous year

**16**  
commercial  
TV channels

**57%**  
of viewing is  
on commercial  
TV channels

TV advertising offers the **best ROI.**

# Strengths of TV advertising

**A single premium environment  
that offers two forms of TV  
advertising: mass and targeted.**

- Reaches a broad audience and drives strong impact
- Delivers measurable results
- Is part of a positive, social viewing experience
- Works for advertisers of all sizes and categories
- Is trusted, safe, and transparent
- Operates in a high-quality,  
professionally produced environment

## Total TV

- direct
- programmatic

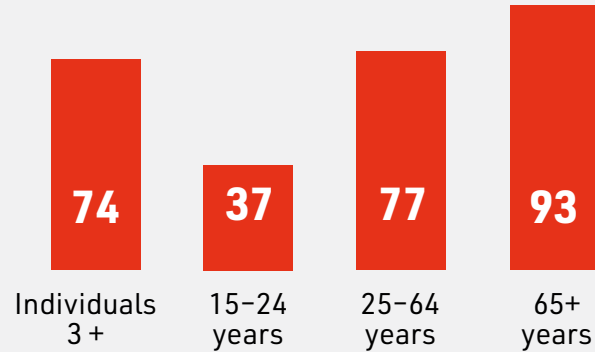
# TELEVISION IS A POPULAR PASTIME IN FINLAND



# Commercial TV reaches 4 million Finns each week

**49%** of Finns watch TV daily and **74%** weekly.

## Weekly TV reach by age group (%) in commercial TV channels

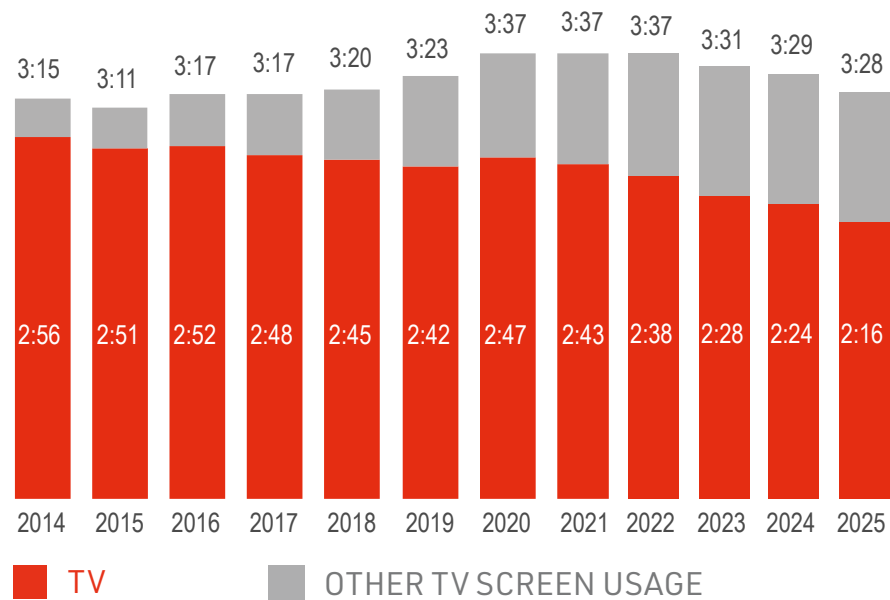


Source: Finnpanel Oy, TV Audience Measurement 2025



# People spend a lot of time watching TV

Time spent watching TV, hh:mm



Daily TV  
viewing time

**2 h 16 min**

**36%**  
of the media  
day is spent  
with **Total TV**  
content



**TOTAL TV 36%**

**OTHER MEDIA 64%**

A Finn's total  
media day is  
**9 h 34 min.**

Time spent with  
Total TV content is  
**3h 29 min** per day.

Source: Finnpanel, TV Audience Measurement 2025 (3+ years of age). Other screen usage includes streaming services, old recorded content, gaming and DVD/Blu-ray viewing.

Source: Mind 2024 database, n=19,624, est. 3.7M, aged 15-74

Total TV = Yle and commercial TV channels, online TV, advertising-funded and subscription-paid streaming services.



**FINLAND  
IS HOME TO  
MILLIONS OF  
SMART TVS**

## Finland's TV device base is modern

Television is a mass medium delivering content to all screens. It is defined by its content, not the device it is viewed on.

### TV signal reception in Finland

CABLE



ANTENNA



IPTV



SATELLITE



Source: Finnpanel; Television viewing in Finland 2025

Finland transitioned to HD broadcasting in spring 2025.

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

TV screen usage  
plays a major role:  
**4,430,000**  
TV receivers in Finland

TV households  
have a wide  
range of devices

Smartphone in **94%** of households

Computer in **85%** of households

Tablet in **49%** of households

# CTV – digital advertising on the TV screen

**Connected TV (CTV)** refers to content delivered over the internet directly to internet-connected TV screens, bypassing traditional operators or cable providers.

**CTV offers advertisers more precise targeting and interactive advertising opportunities**

CTV advertising spans linear, programmatic and streaming environments. As investment in the CTV space continues to grow, it is important to recognize that not all CTV inventory delivers the same value. CTV includes both streaming services and platforms such as YouTube, but the attention they generate differs significantly. Attention measurement helps marketers better understand the true effectiveness of video advertising. If viewers are not engaged with the screen, the value of impressions decreases.














- Streaming services deliver +18% more active attention (attentive minutes) compared to YouTube CTV (Source: VAB, The Impression Gap, 2025).
- Streaming services generate +33% more co-viewing than YouTube CTV (Source: VAB, The Impression Gap, 2025).

## CTV device base in Finland

SMART TVS	2,037,000
SMART TVS CONNECTED ONLINE	1,848,000
HYBRID TVS	557,000
HYBRID TVS CONNECTED ONLINE	474 000

Source: Finnpanel; Television viewing in Finland 2025

# CTV opportunities in Finland's commercial TV and streaming ecosystem

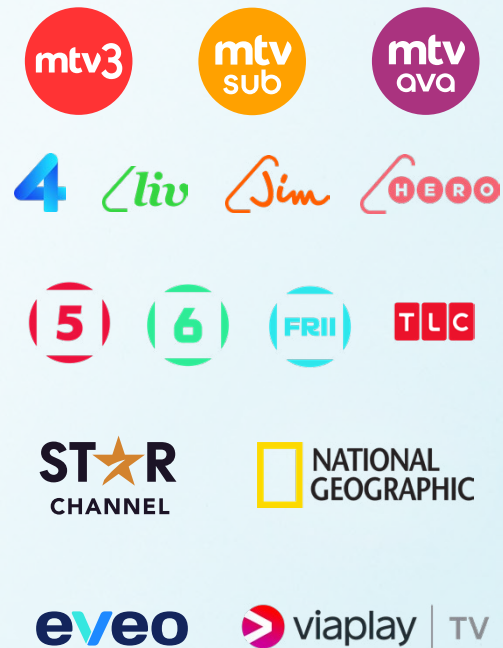
	Tv	Online-tv	Device manufacturers
<b>Operators</b>	   	      	 
<b>Inventory</b>	Linear HbbTV	AVOD/HVOD Fast	Smart TV Home & First Screen Fast
<b>Formats</b>	Addressable TV (Digital Linear TV) HbbTV L-banners HbbTV -Overlays	Pre Roll Mid Roll Pause Ad	Display Ads Home Screen Ads Video Ads Interactive Ads
<b>Buying models</b>	Direct sales Programmatic	Direct sales Programmatic	Direct sales
<b>Targeting options</b>	Most common: Demographics Geo	Most common: Demographics Geo Device	Most common: Demographics Geo Device
	Additionally, there are several publisher-specific / platform-specific targeting options available.	Additionally, there are several publisher-specific / platform-specific targeting options available.	Additionally, there are several publisher-specific / platform-specific targeting options available.



# FINLAND HAS A STRONG COMMERCIAL TV MARKET

# Finland has 19\* commercial channels selling advertising airtime

## Ad-funded linear free-to-air (FTA)



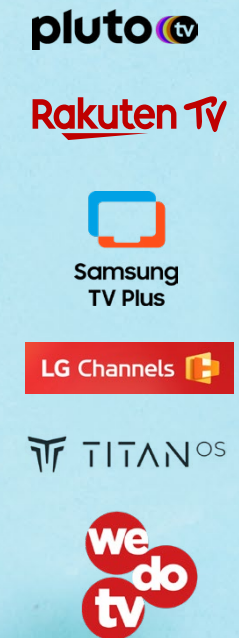
## Advertising-funded streaming services



## Pay TV channels

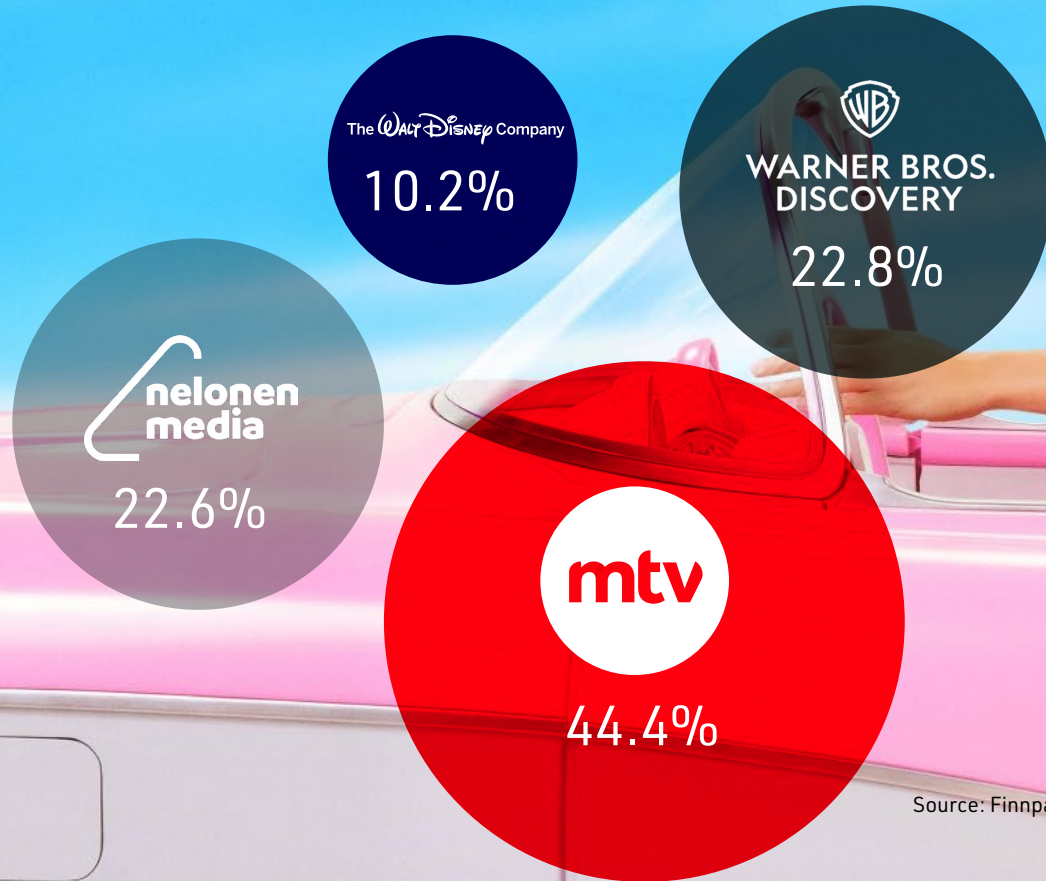


## FAST channels



\* In Finnpanel's measurement, there were 15 commercial channels in 2025. Viaplay TV launched in November 2025 but was included in Finnpanel's grouping from 1 January 2026 onwards (16 channels): MTV3, MTV Sub, MTV Ava, Nelonen, Liv, Jim, Hero, Kutonen, TV5, The Discovery Channel, Frii, Eurosport 1, TLC, Star Channel, National Geographic, and Viaplay TV. In April 2026, Viaplay Sports 1, 2 and 3 will be added, bringing the total to 19 channels in the measurement.

## Viewing share of commercial TV among 25–64-year-olds



# 62%

of viewing among 25–64-year-olds is on commercial TV channels

Source: Finnpanel, TV Audience Measurement 2025

Source: Finnpanel, TV Audience Measurement 2025

# What makes the Finnish TV market unique?

**High-quality content for free:** In Finland, consumers enjoy high-quality content free of charge both on linear TV channels and streaming services—whether it's sports or major entertainment shows. This sets Finland apart from many other countries, such as the United States and Sweden, where consumers have traditionally needed to pay for commercial TV content.

**Slower decline of linear TV:** Unlike many other markets, linear TV viewership in Finland is declining more slowly. This is partly driven by the strong availability of high-quality free content. Compared to other Nordic countries, linear TV reach in Finland is 10% higher.\*

**Age structure:** Demographics are one key reason why linear TV viewing is declining more gradually in Finland, and why the shift to streaming is slower than in many other markets. Finland's age structure differs significantly from, for example, the United States, where 52% of the population is under 40. In Finland, only 39% are under 40.\*\*

**Strong connectivity and advanced device base:** Finland's digital transition is supported by globally exceptional, high-quality and widely available internet connectivity, as well as a well-developed device base. 98% of households have an internet connection.\*\*\*

**Data quality and transparency:** Finland is a global leader in data quality and advertising transparency in the Total TV market. As early as 2018, Finnpanel introduced Total TV measurement, covering both traditional TV channels and domestic streaming services. This third-party audited measurement provides advertisers with a reliable way to evaluate campaign performance and make informed decisions.

**CTV and HD transition:** Finland's television distribution underwent a major change in spring 2025, when SD broadcasting was widely replaced by HD transmission.

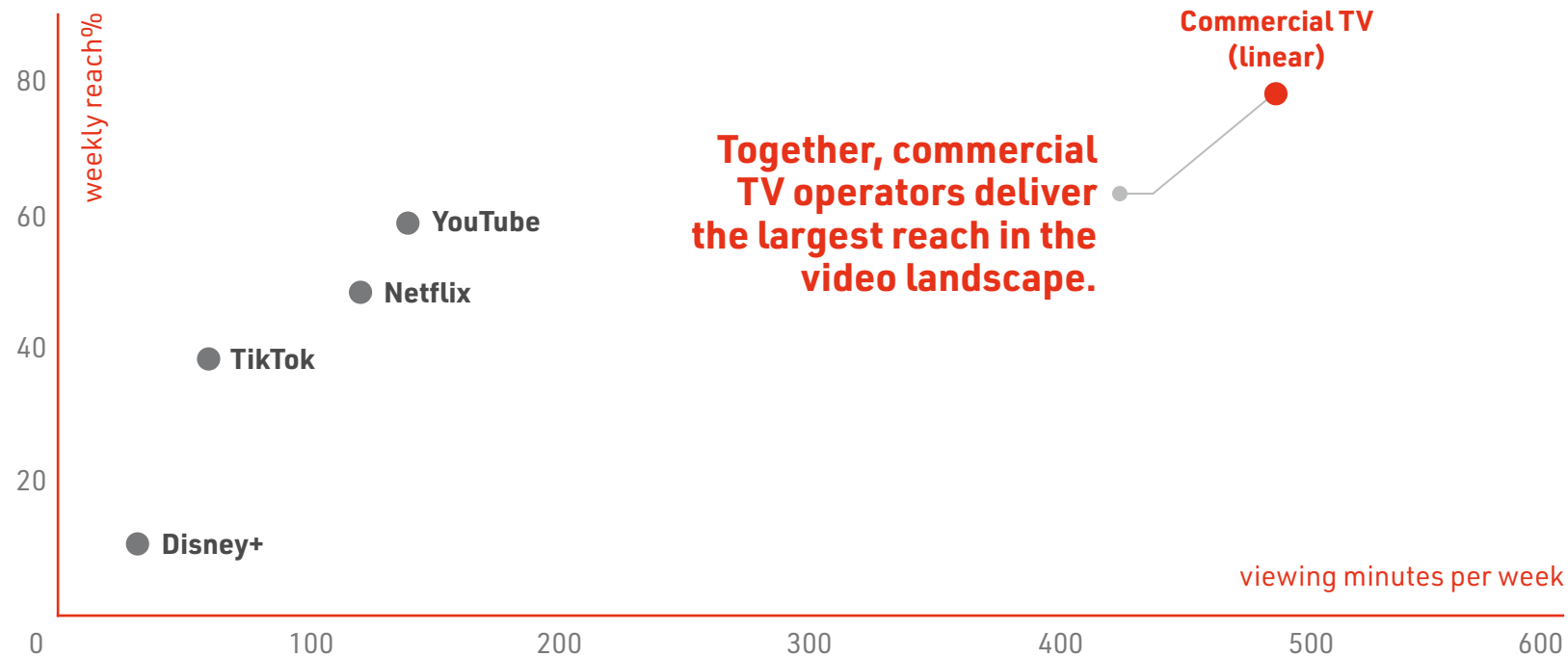
**FAST channels still relatively small:** Due to factors such as strong free content availability and the population's age structure, consumption and supply of FAST channels, i.e. streaming channels similar to linear TV delivered over the internet, remain relatively limited in Finland.

\* Reach: Finland (Finnpanel), Denmark (Nielsen), Norway (Kantar), Sweden (MMS). Total population.

\*\* USA: Insider Intelligence (02/2023); Nordics: NordicStatistics.org

\*\*\* Internet penetration: DataReportal –Digital 2025 Finland.

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



Source: Finnpanel, Total TV study, weeks 36–52, 2025. Commercial TV (linear) = commercial channels of Nelonen Media, Disney, MTV and WBD.

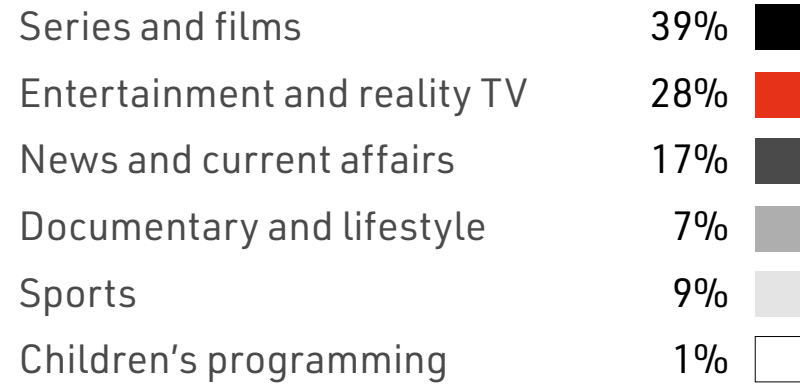
Note: International operators' figures are based on viewing within the home network.



# 56% of all commercial TV viewing is domestic content

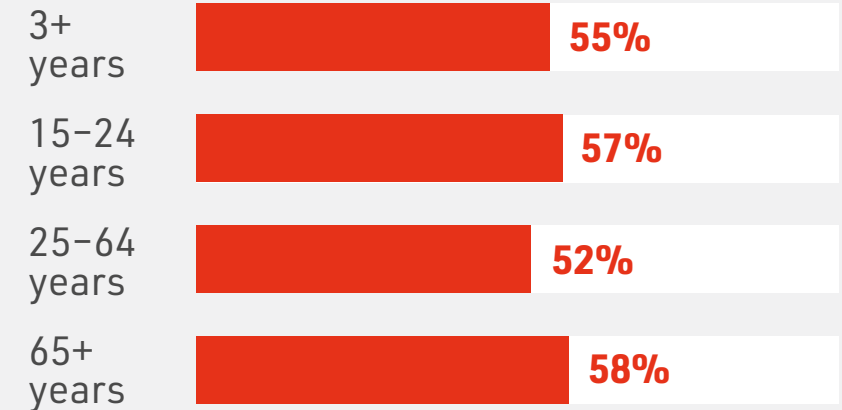
## Most-watched TV genres in Finland 2025

(% of commercial TV viewing)



## Domestic content –share of view in

age groups

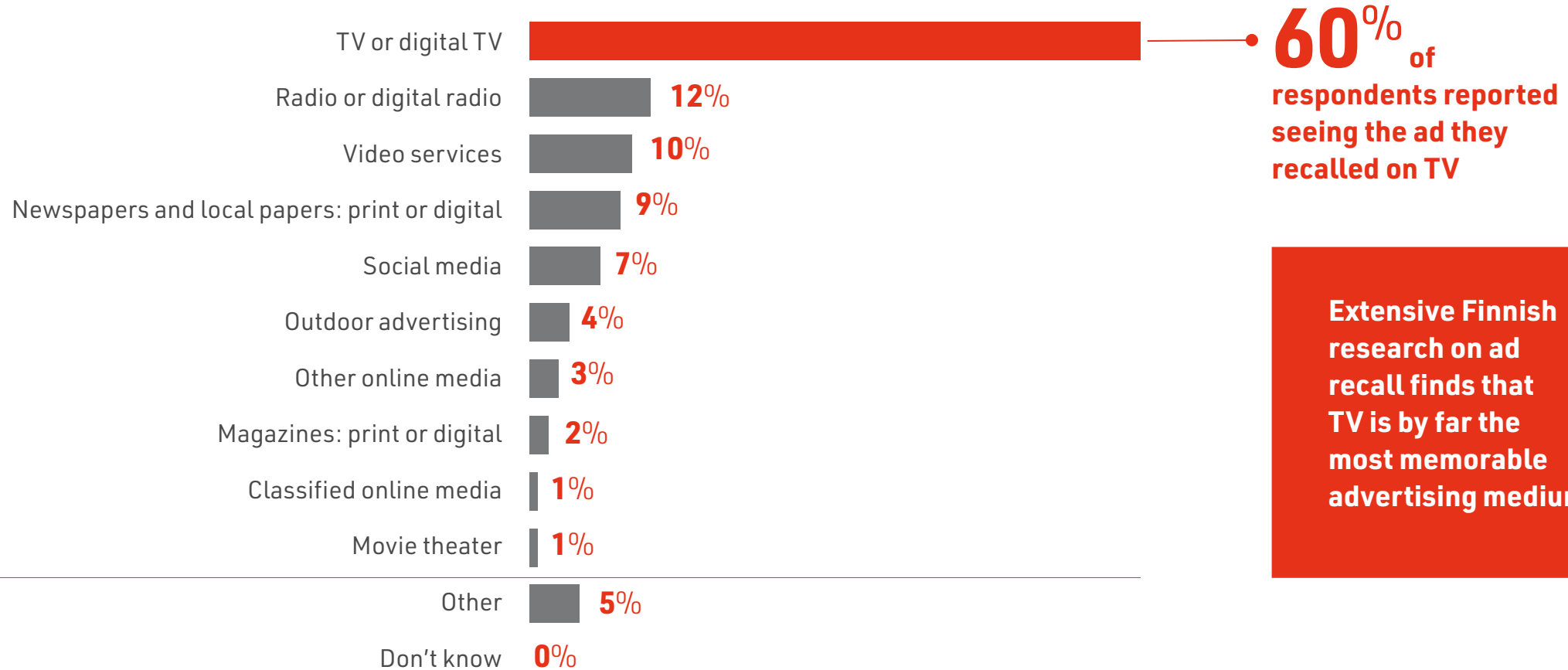


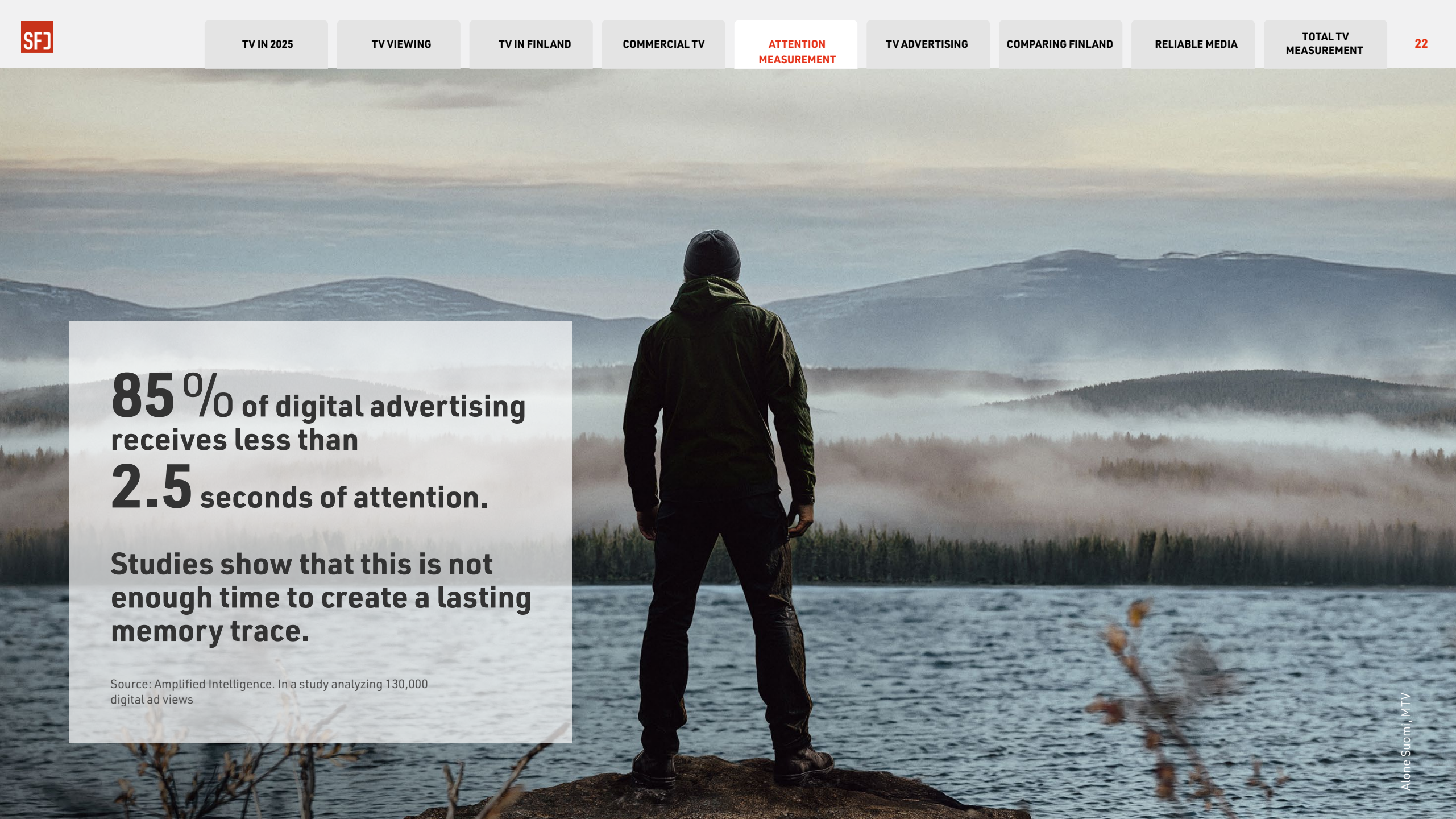
Source: Finnpanel Oy, TV Audience Measurement 2025, including commercial channels for which genre information is available

# TV ADVERTISING GETS NOTICED AND REMEMBERED



## TV is the most memorable advertising medium





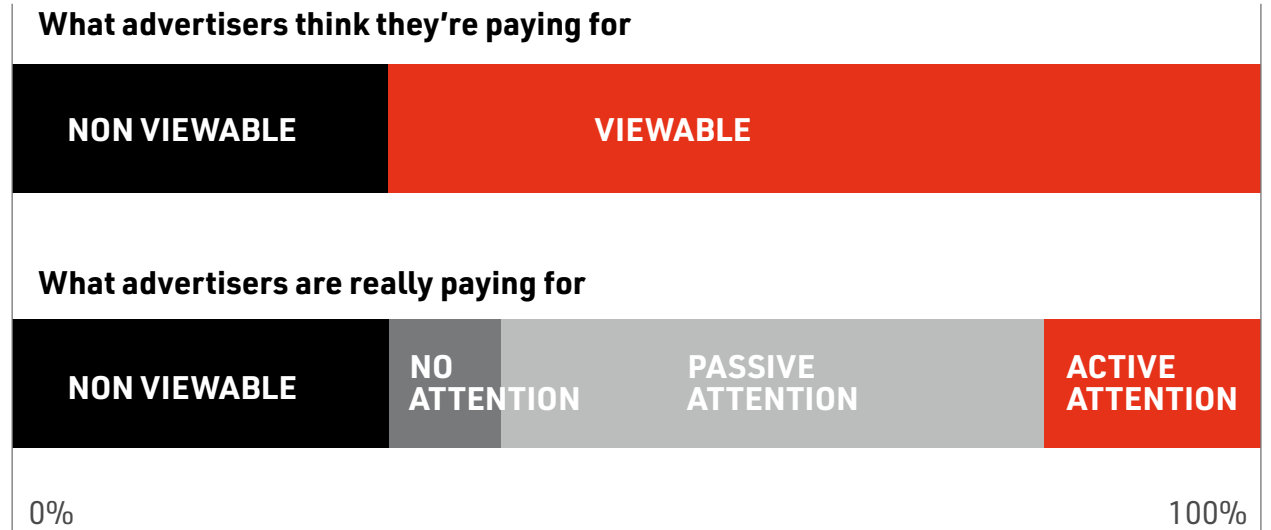
**85%** of digital advertising  
receives less than  
**2.5** seconds of attention.

Studies show that this is not  
enough time to create a lasting  
memory trace.

Source: Amplified Intelligence. In a study analyzing 130,000  
digital ad views

# Attention measurement shows why visibility alone is not enough

- Attention is a more important metric for advertising effectiveness than visibility.
- Attention is decisive: premium environments are up to 11.5 times more effective than low-attention digital formats. However, one third of advertising budgets is still invested in media that fails to capture attention. [The Cost of Dull Media](#) (System1).
- Cheap media is not cheap if no one is watching.
- Attention measurement can help advertisers plan more effectively, thereby helping to [reduce the carbon footprint](#) of media advertising. Advertising that fails to capture genuine attention only [generates unnecessary emissions and is a wasted investment](#).
- Streaming generates more attention than YouTube. One of the key challenges is understanding YouTube's role within the CTV ecosystem. Despite its claims, YouTube is not a television medium. Research shows that, across all times of day, viewers pay more active attention to streaming applications than to YouTube ([Tvision, State of Streaming, 2026](#)).

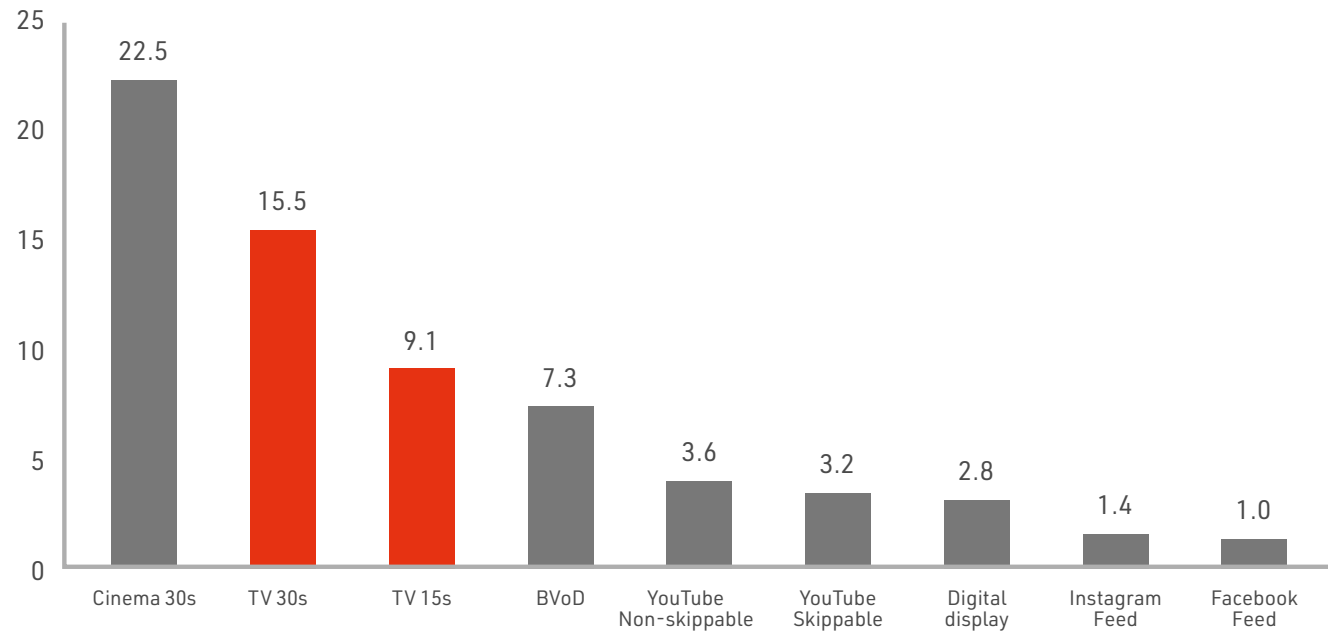


Attention in media advertising measures how much and how deeply consumers engage with ads across different media environments. It is a broader and more precise metric than OTS (opportunity to see) or viewability. Attention captures how much of the audience actually notices and looks at an ad.

-> [More about attention measurement](#) (in Finnish)

# TV advertising captures viewers' attention

Average attention per 1,000 impressions (APM) across media categories



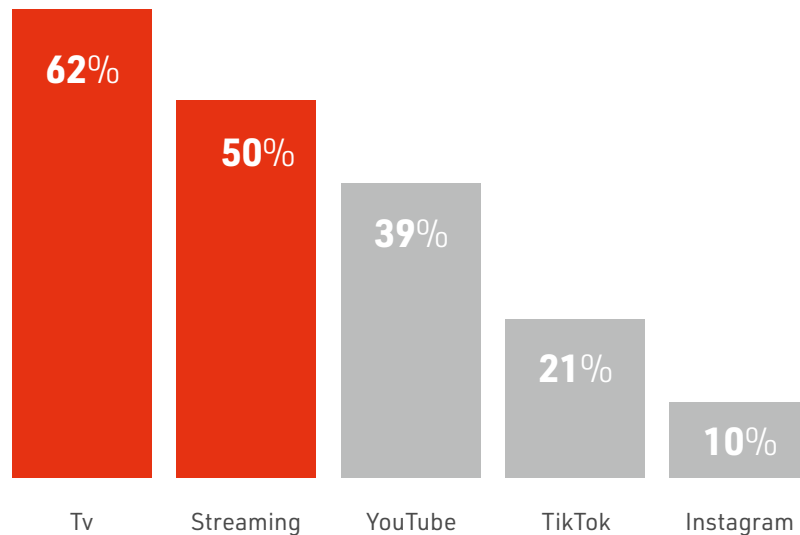
APM = Attention per 1,000 impressions, i.e. attention seconds per 1,000 impressions.

Source: Tvision (TV), Lumen (digital), 2024, presented at the Television Taika event 10/2024 / Peter Field.

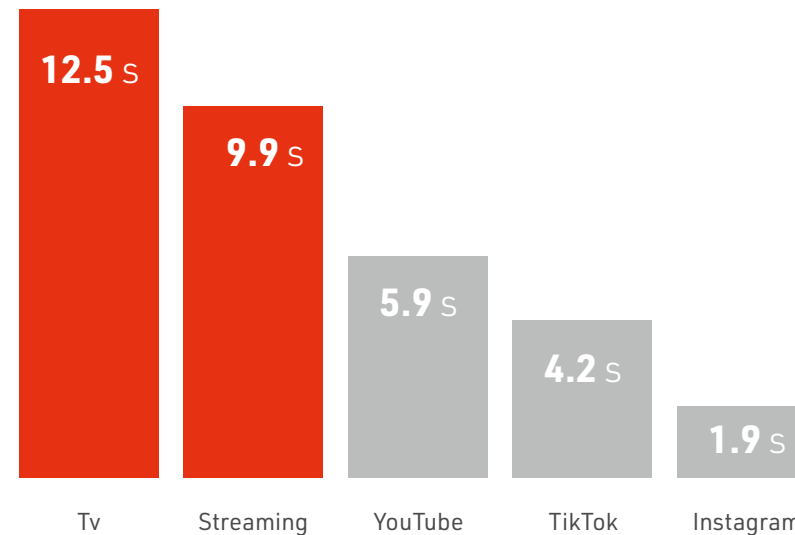


# Total TV advertising delivers the highest attention, providing the best conditions for memory formation

Share of consumer attention in a 20-second advertisement



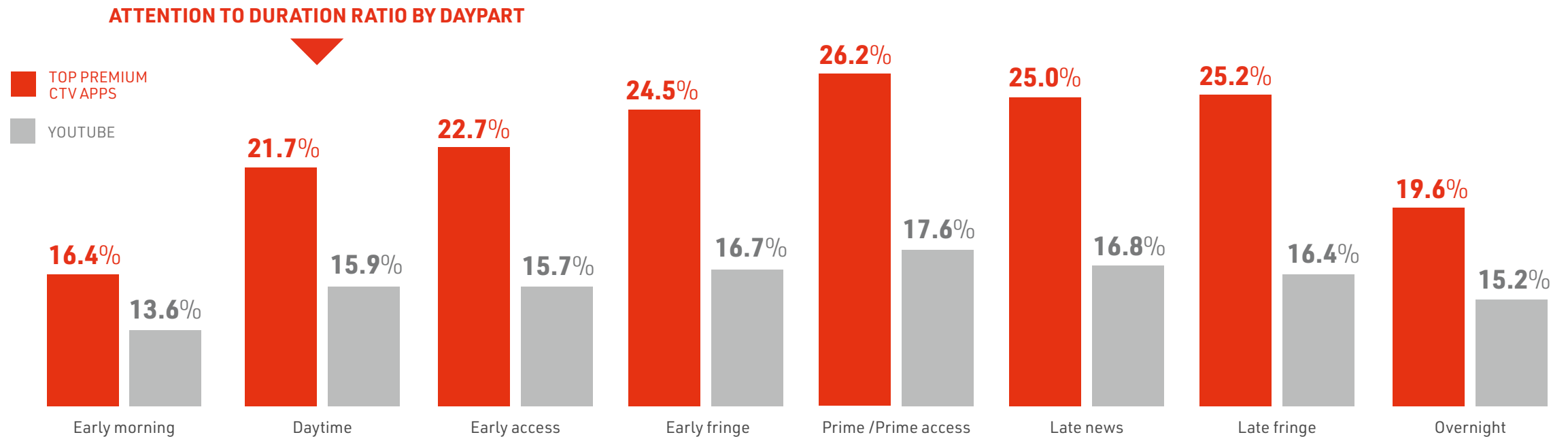
How many seconds did consumers watch a 20-second advertisement



A lasting memory trace starts to form only after 2.5 seconds

# Streaming generates more attention than YouTube

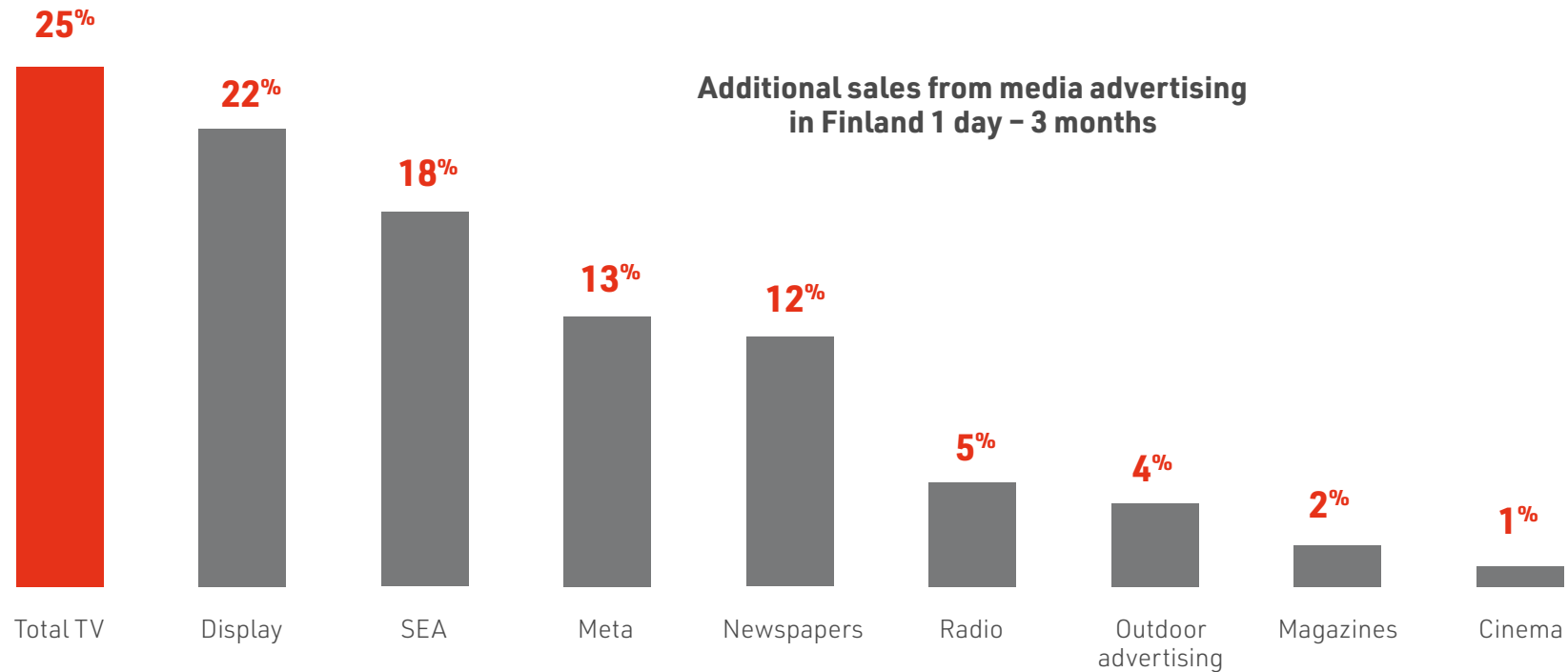
According to TVision's Attention to Duration Ratio metric, viewers pay more attention to premium CTV apps than to YouTube across all viewing times of the day. YouTube's content library includes videos of highly variable lengths, so results are weighted based on viewing duration. This approach provides a more accurate reflection of YouTube's total viewing time compared to apps where content is primarily TV programming.





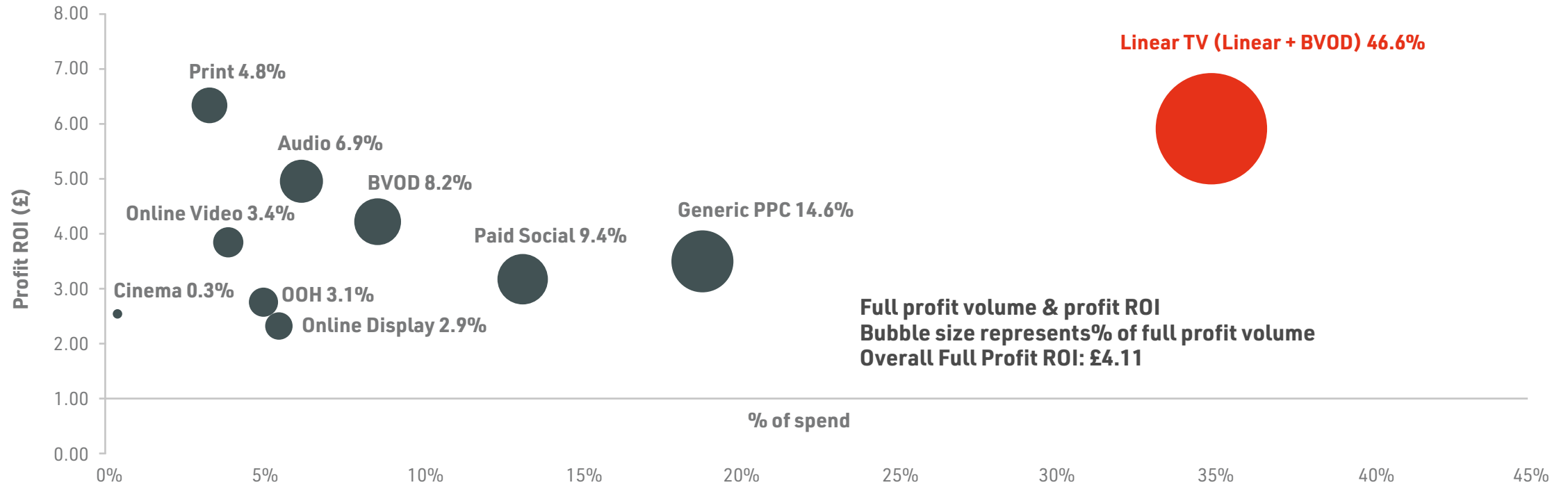
# TV ADVERTISING DELIVERS RESULTS

## Total TV generates the most additional sales



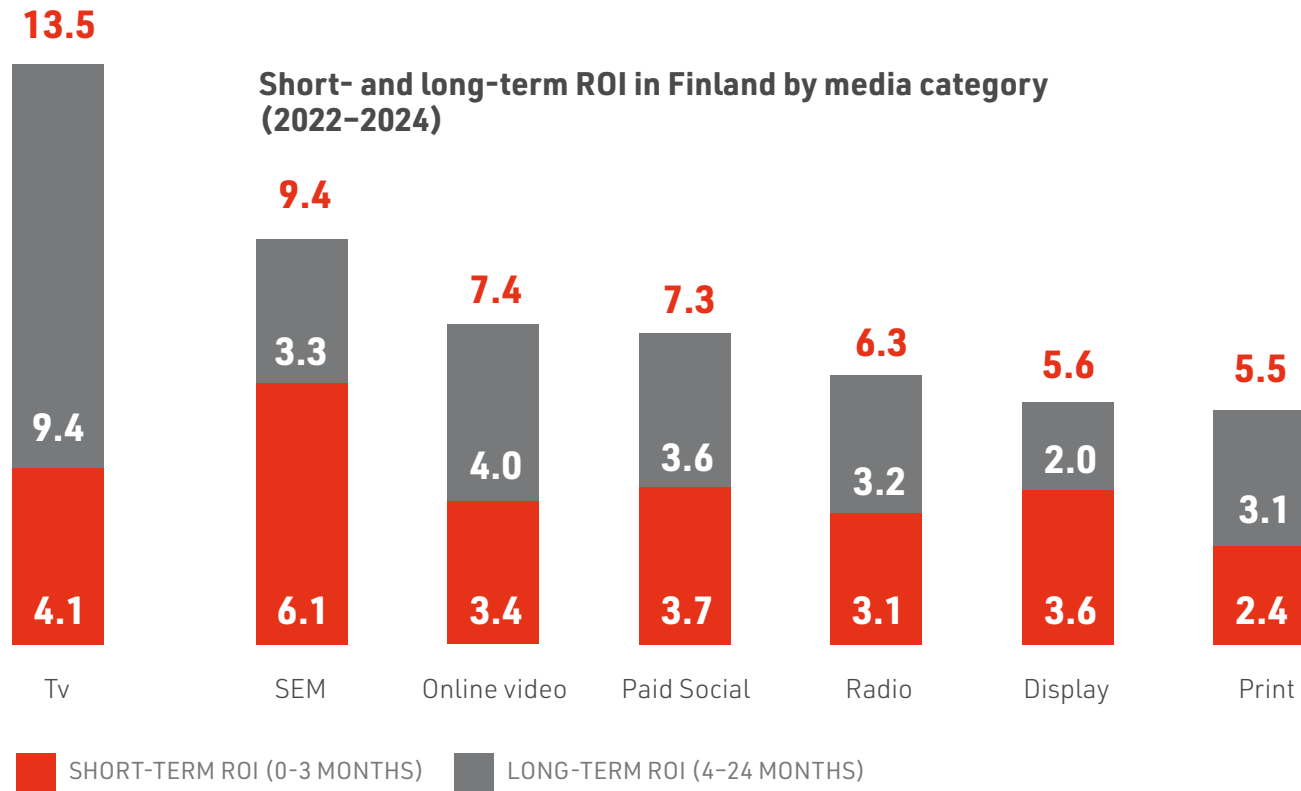
Source: Meta-analysis of econometric modelling in Finland, 2024. Conducted by Dagmar Oy. The analysis includes 69 brands and 38 companies, 121 models, and €260 million in media spend. Time period: 2016–2023. Short-term impact window: 0–3 months.

# TV advertising generates the best ROI



Source: Profit Ability 2 (April 2024) –Short-term benchmarks: Ebiquity, EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.  
 Long-term multipliers: EssenceMediacom, Gain Theory, Mindshare, Wavemaker UK.

## TV advertising is a major long-term driver of ROI

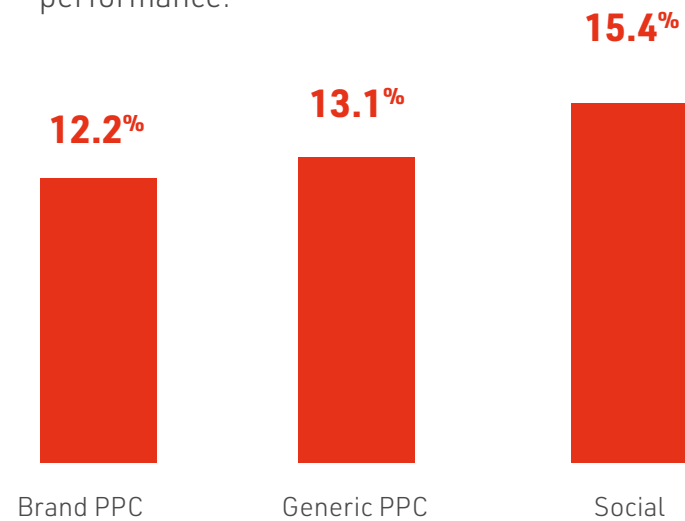


- In the short term, TV advertising delivers a fourfold return on investment.
- In the long term, total ROI reaches 13.5, clearly outperforming search advertising, which performs well primarily due to its short-term effectiveness.
- Compared to econometric models in other Nordic countries, TV advertising ROI in Finland is higher than the Nordic average.

Source: Acceleration Nordic, over 200 sales models across the Nordics and 8 retail models in Finland (2020–2023). Long-term multiplier based on the studies "Profit Ability: The Business Case for Advertising" (2017 and 2024).

# TV advertising increases the performance of digital channels by 13.7%

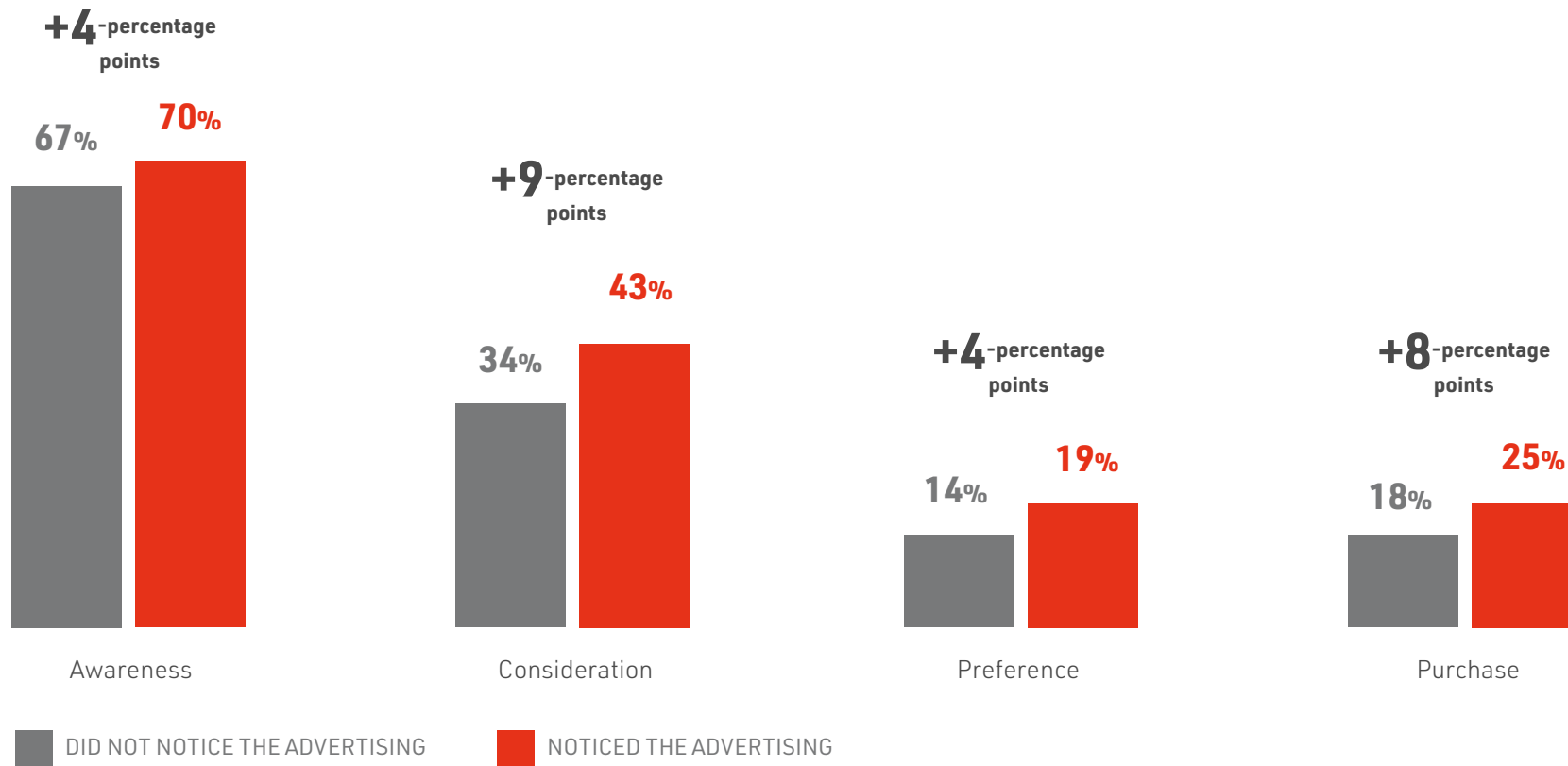
On average, higher levels of TV advertising improve overall performance.



Source: Why the Eff would you cut TV? GroupM, 2025



# TV advertising has the strongest impact on brand consideration and purchase intent



**Brand lift** = The difference in brand metrics between people who noticed the advertising and those who did not

## Tips for TV advertisers with a small budget

### TV campaigns do not always require large budgets:

- Optimize targeting (geography and tightly defined audiences)
- Maximize return on investment (off-peak placements, seasonal efficiencies)
- Cost-efficient access to a wide range of creative ad formats such as split screen, overlays and program sponsorships
- CTV solutions offer targeted and cost-efficient

### Research shows that:

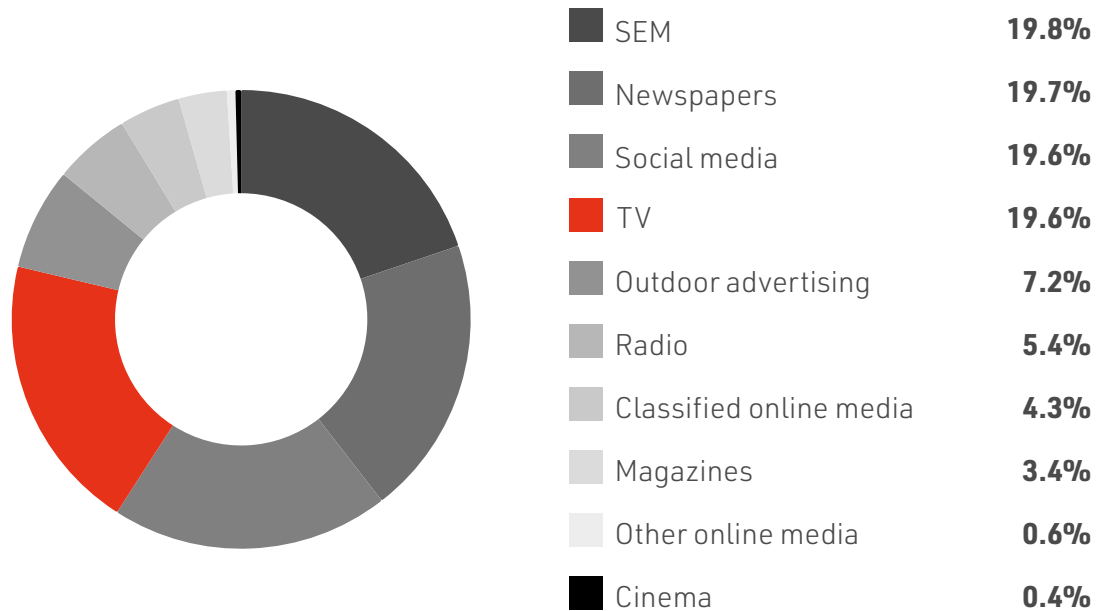
- TV increases the effectiveness of other media by up to 54%\*
- The optimal media mix varies by industry, but TV is often one of the largest components\*\*
- TV typically accounts for 66% of small brands' media budgets but drives 80% of advertising-generated sales\*\*

-> [More tips: TV Advertising Basics Guide](#) (In Finnish)

Sources: \* Demand Generation (2022), Mediacom / Wavemaker / Gain Theory (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).



## Share of advertising spend by media category in 2025



Digital TV advertising grew by **7.0%** in 2025 compared to the previous year.

The fastest-growing digital media channel.

TV advertising spend in 2025 was

**€246.8 million** in 2025

(total media advertising spend: €1,260.7 million)

# FINLAND RANKS HIGH INTERNATIONALLY



JEOPARDY!

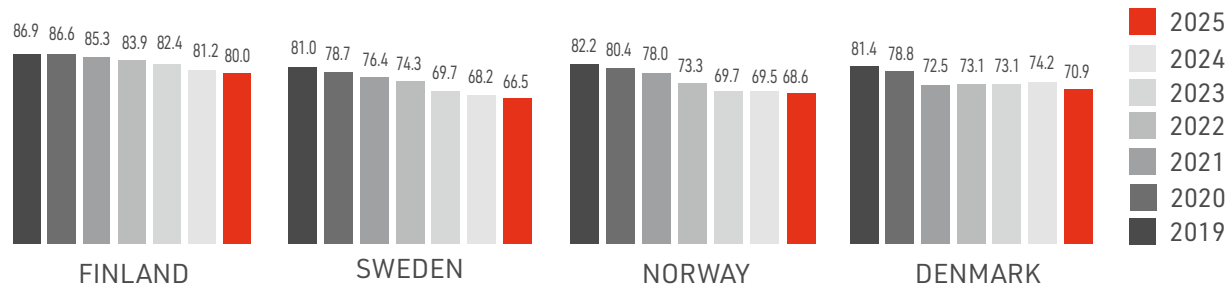
SUOMI

330

## Finns watch the most TV in the Nordics

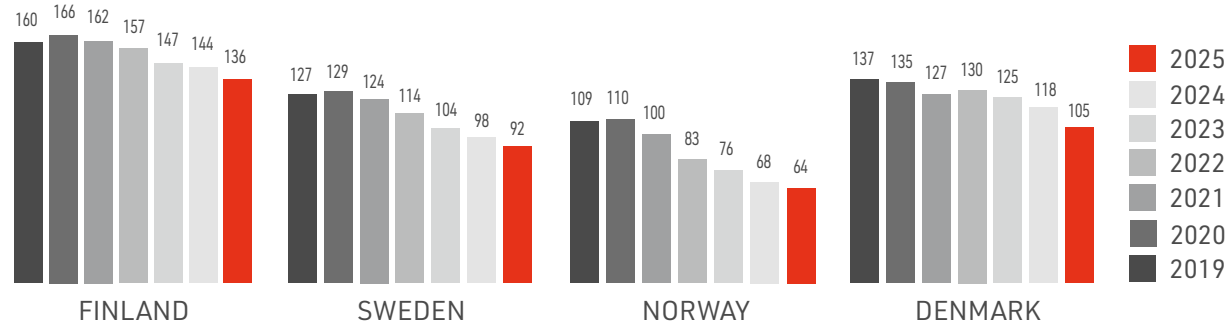
### Weekly TV reach in Finland and other Nordic countries, 2019–2025

WEEKLY REACH %



### Daily TV viewing minutes in Finland and other Nordic countries, 2019–2025

DAILY VIEWING MINUTES



Nordic comparisons show that the **Finnish TV market has remained strong**, both in terms of reach and viewing minutes.

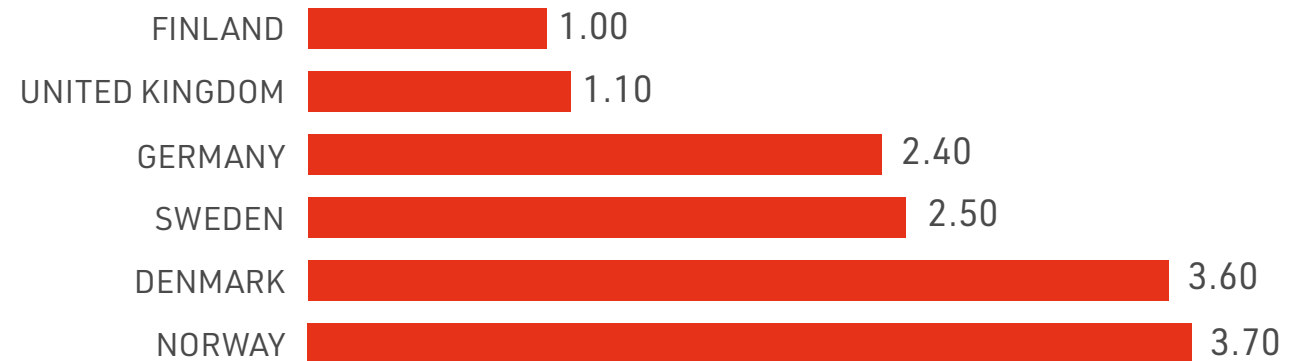
**In addition, TV advertising is highly competitive in terms of pricing.**

Source: Population aged 3+, Finland (Finnpanel), Denmark (TNS Gallup), Norway (TNS Gallup Norway), Sweden (MMS).  
Note: Measurement methodologies vary by country, which affects comparability of the figures.



## TV advertising in Finland is very competitively priced

CPT gross price index (Finland = 1.00)



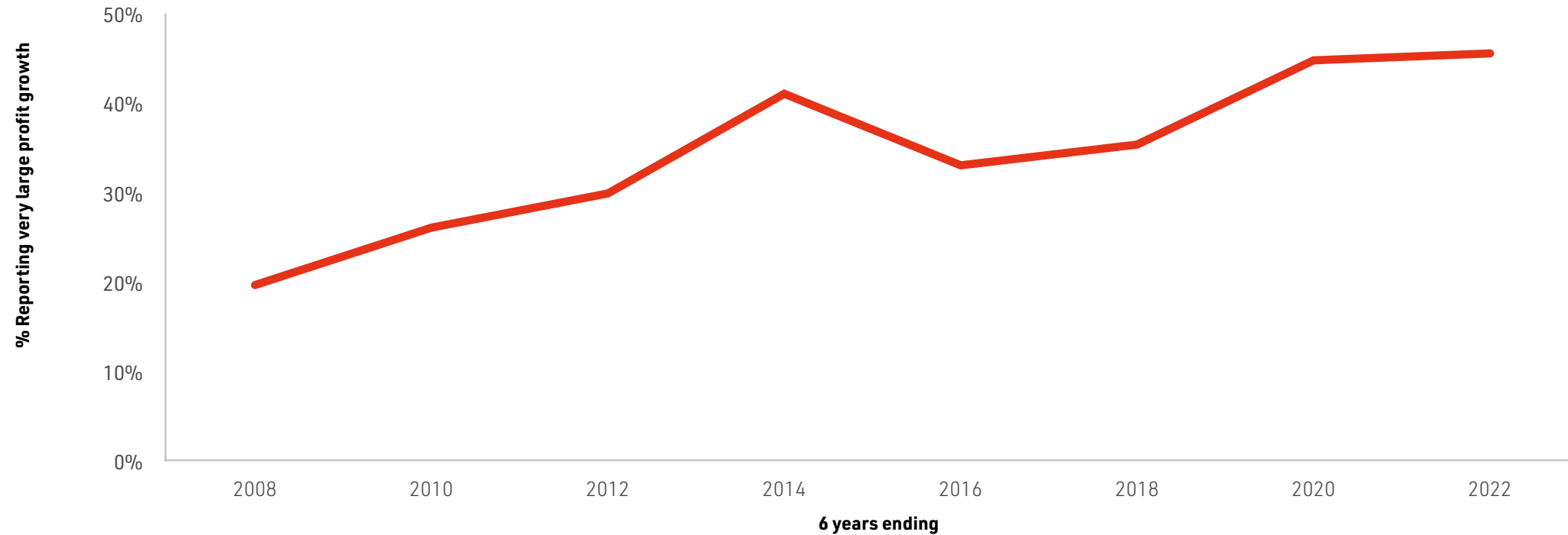
Source: Dentsu, March 2026, comparison of gross CPT rates, averages for ages 15+ and 25-49.



# TV ADVERTISING IS RELIABLE AND TRANSPARENT

# Trust improves marketing performance

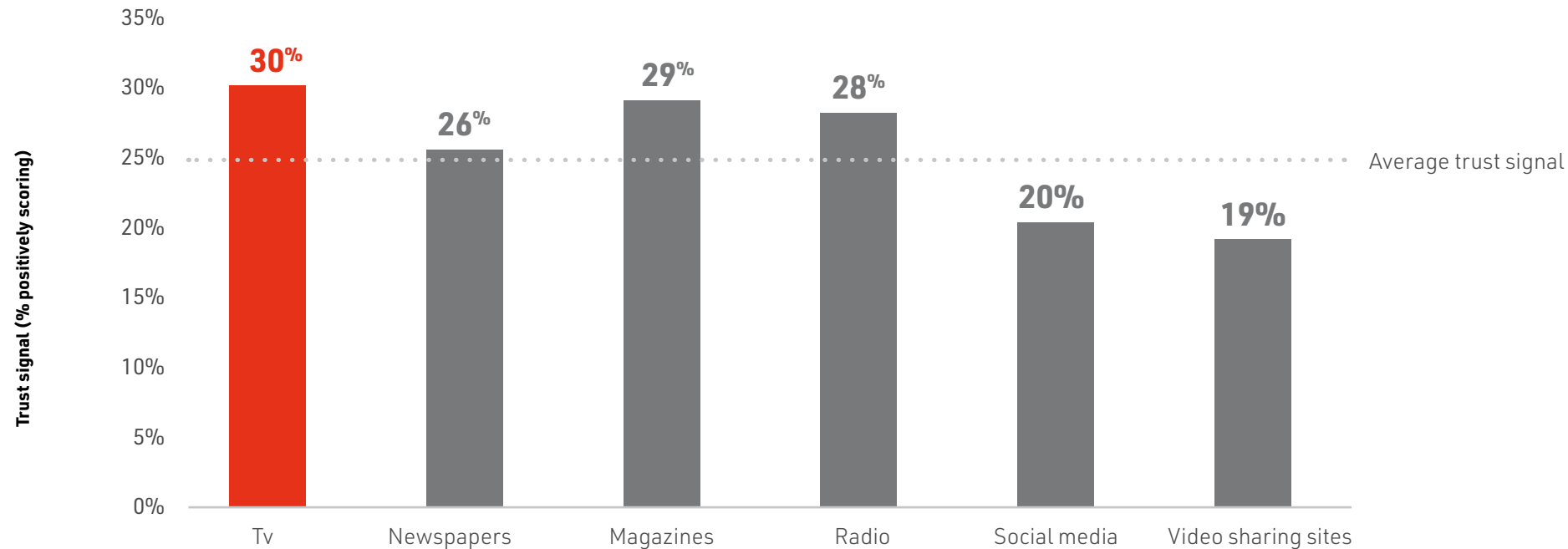
## % cases with strong trust growth reporting strong profit growth



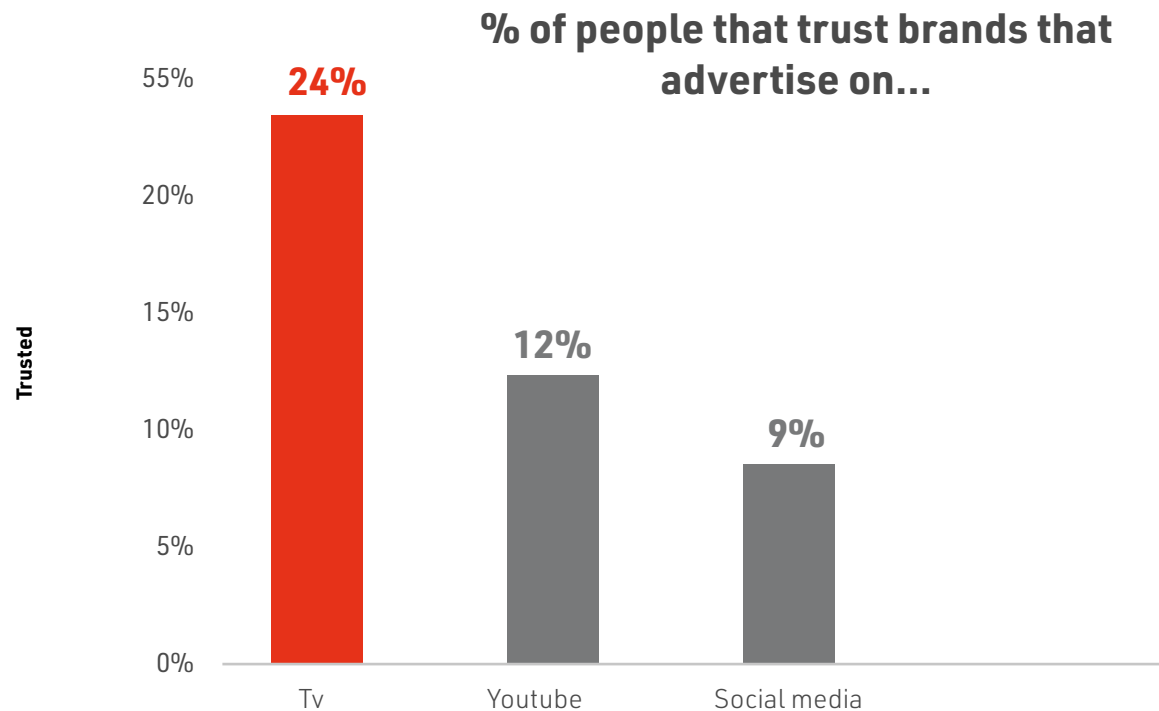
Source: IPA Databank(2004–2022), profit cases reporting very large trust improvements. Note: insufficient data prior to 2008.

# TV is the strongest medium for building trust

## Trust to deliver on promises made



## Brands advertised on TV are trusted twice as much as those on YouTube



Source: Tapestry Research, 2025, ADS1a. Thinking about different places in which you see advertising, please tell us how you feel [TRUSTED] about brands that advertise [INSERT TYPE OF AD].  
Social media e.g. Facebook, Instagram and TikTok.



# Consumers trust TV as a medium

Television is a trusted medium among EU citizens

In Finland, television and newspapers are the most trusted media

Trust in news is higher in Finland than in any other EU country.

Source: EBU Media IntelligenceService –Trustin Media, 2025



# TOTAL TV AUDIENCE MEASUREMENT DELIVERS RELIABLE DATA



# TV and video audience measurements provide reliable data

## TV AUDIENCE MEASUREMENT

- Average viewer numbers and reach figures for TV programmes
- Number of contacts and reach figures for TV campaigns

## TOTAL TV SURVEY

- Average number of viewers and reach figures for TV and streaming services

## SPOT ON VIDEO ADVERTISING MEASUREMENT

- Number of contacts and reach figures for TV, streaming and online video advertising campaigns

## SpotOn advertising measurement

SpotOn is a cross-platform advertising measurement system that allows advertisers to accurately measure the net reach and playback of TV, streaming, and online video campaigns across devices.

Reliable and transparent metrics have always been essential for advertising and for a responsibly operating media industry. They provide critical input for campaign planning, analysis, and trading.

In Finland, commercial TV companies launched the SpotOn survey in autumn 2024. It brings comparable reach and contact metrics for TV, streaming services, and online video campaigns to the market.

### SpotOn measurement provides the market and advertisers with:

- High-quality, uniform TV and instream video advertising measurement
- Transparent industry solution with precise quality requirements for contacts
  - Impressions are 100% viewed, user-initiated viewing, and the video player is visible on the screen throughout the contact.
- Unified metrics for TV and online video campaigns by target group;
  - TRPs
  - Reach(net) and repetition
- Daily updated data, available as early as the next day
- A methodology validated by a third party
- An industry-wide TV solution based on shared standards, open for participation by other players



### The SpotOn measurement consists of three different data sources:

- 1 Finnpanel's TV Audience Measurement** produces the minute audiences of TV channel advertisement breaks (spot data). The panel's broadband meter measures video viewing and identifies online viewing on different devices. The measurement enables, for example, streaming services to be viewed together on the TV screen and the reach of advertising to be calculated in different target groups.
- 2 Media companies' Ad server data**, which shows how much, when and to which devices and target groups ad impressions have been distributed. The data includes gender and age data, based on registration data or demographic modelling.
- 3 The Spotgatetags of the advertisements** are included in both the spot data of the TV meter survey and the Ad server data, and they are used to identify different advertisements in the measurement.

# 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](http://www.finnpanel.fi)



\* Households have a total of 1,410 TVs, 1,840 phones, 1,460 PCs, 570 tablets and 370 game consoles.

Source: Finnpanel Oy 2025, Total TV Measurement



Measurement viewing information

1,000+ household sample of 2,000 people and nearly 6,000 devices\*

The previous day's TV viewing is reported the next morning, Total TV in the afternoon



Time spent watching Netflix, YouTube, Disney+, Max and TikTok in the home network



Television operators provide precise broadcast information on programmes, breaks, spots



yle AREENA



All start-ups and metadata from TV operators



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