

COMMERCIAL TV IN FINLAND 2024

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The *WALT DISNEY* Company

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DISCOVERY

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Growing television market and Finland's special features – where is the media sector heading?



Finland has proven to be an exceptional market in the television industry. In 2024, the market for television advertising grew by 4%, and digital television advertising increased by as much as 16% ([Kantar Ad Intelligence, 2024](#)). Over the past decade, the total media consumption has increased significantly and has stabilised at a completely new level. In particular, linear television and paid, domestic streaming services have strengthened their position in the daily media use of Finns. Commercial television reaches 75% of Finns every week, and people spend an average of 2.5 hours a day watching television. The large screen dominates people's viewing habits and has remained the most important platform for watching news, entertainment and sports.

The content offering is

currently diverse and viewers can choose the most suitable option between free, advertisement-funded or paid subscription services. A new hybrid model has arrived on the market: more lower priced subscriptions with ads. In 2024, the market for TV advertising was driven by the launch of new ad-funded streaming services, such as Max and Disney+.

In Finland, it is important for the television industry to remain reliable, responsible and transparent

The most popular TV shows attract millions of viewers, which underlines the significant responsibility of mass media. The wide reach and the time spent by viewers must be used ethically and responsibly from both a journalistic and commercial perspective. Low impression prices and a device-based measurement method should not replace a transparent and uniform measurement model that is based on real people.

The development of the media environment requires a continuous review of the measurement methods. The internationally advanced SpotOn measurement provides standardised key figures for TV and video advertising campaigns. The starting point for all cross-media projects is an accurate and reliable cross-platform video

measurement, which enables comparability between different TV platforms.

SpotOn provides advertisers with valuable information about the number of people who have seen a digital video ad. Digital video advertising measurements have traditionally focused on devices, but the trend is towards human-centric measurements.

One of the biggest questions in the industry is whether to develop a common measurement standard or several different parallel indicators that focus on the special features of online, video or television advertising. Transparency is essential in the measurement of advertising, and ensuring transparency also requires an impartial validation. The EU is taking a stance on the transparency of advertising measurements through the [European Media Freedom Act](#). It is clear that if the media industry does not actively ensure transparency, regulation will inevitably come into play.

Reliable, pluralistic and free media is the cornerstone of democracy. The Finnish television industry is well positioned to meet the challenges of the future.

Anna Lujanen

Head of Operations, Screenforce Finland

Year 2024 in figures

2h 24min

Daily
TV
viewing



56%

of viewing
is domestic
content

5.6 million
Finns

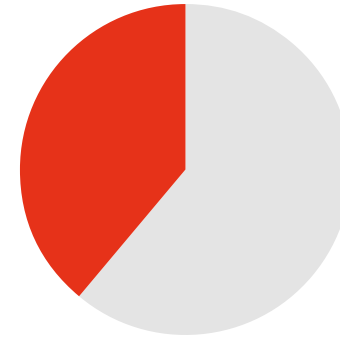
2.8 million
households

2.6M TV households

81%
watch TV
on a weekly
basis

38%

of time spent
with media
goes to
Total TV



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

Spent
on TV
advertising



254.9 M€

(19.6% of all media
advertising spending)

Digital TV
advertising grew
in 2024 by

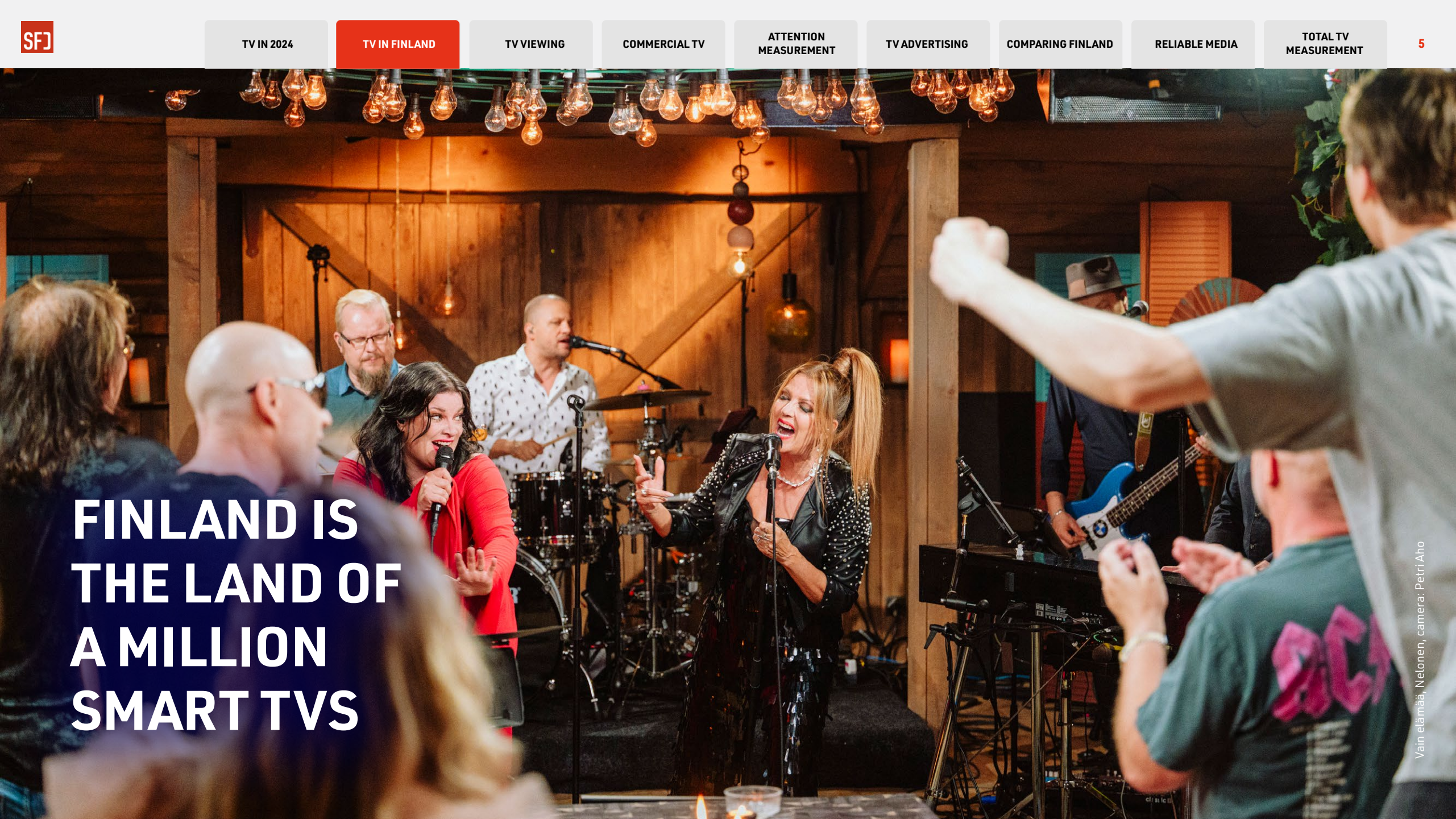
16.1%
compared to the
previous year.

15
commercial
TV channels

57%
Share of
commercial TV
viewing

All sources mentioned later in the report.

TV advertising offers the best ROI.

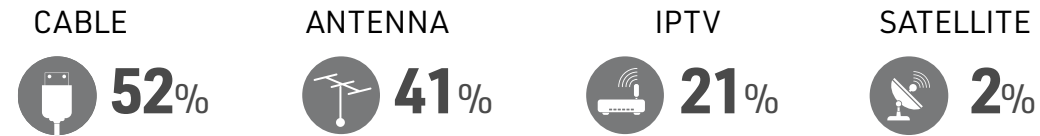


**FINLAND IS
THE LAND OF
A MILLION
SMART TVS**

Finland has a lot of modern devices

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

TV signal reception methods in Finland



Source: Finnpanel; TV Households in Finland 2024

Finland will switch to HD broadcasts in spring 2025

➔ **The number of CTV devices will grow**

Source: Finnpanel; TV Households in Finland 2024

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



TV households also have many other devices

Smartphone in **93%** of households


Computer in **86%** of households

Tablets in **50%** of households

TELEVISION IS A POPULAR PASTIME IN FINLAND

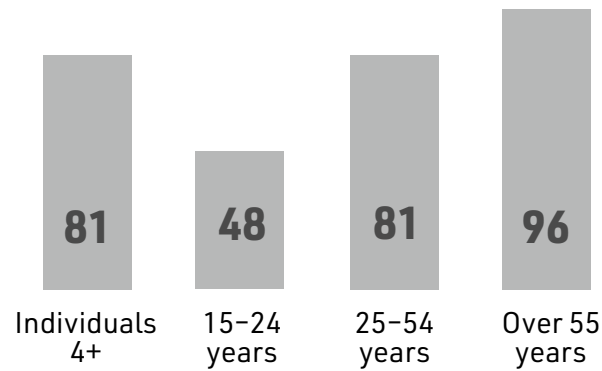


Television reaches 4.4 million Finns every week

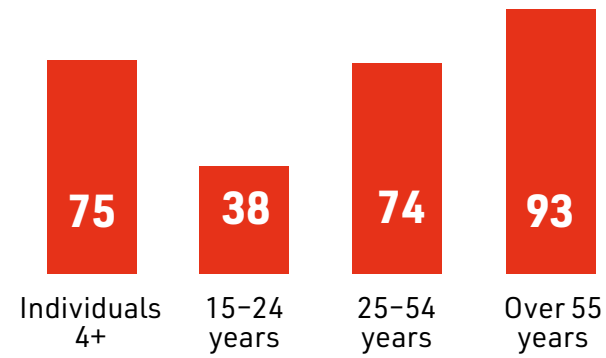

60% of Finns watch TV daily and **81%** watch TV weekly.

TV weekly reach across age groups, %

TV in total



Commercial TV channels

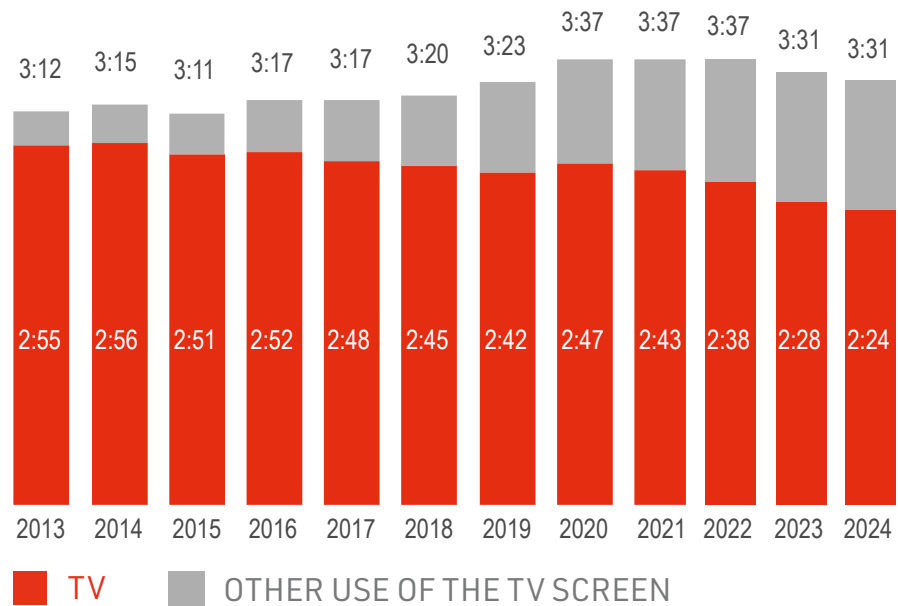


Source: Finnpanel; TV Audience Measurement 2024



People spend a lot of time watching the TV screen

Time spent viewing TV on different screens, h:min



Daily TV viewing is **2 h 24 min**

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



The average media day of a Finn was **9 hours and 10 minutes** in total.

People spent **3 hours and 29 minutes** a day on Total TV content.

Source: Finnpanel; TV Audience Measurement 2024 (+4 years of age). Other screen usage includes streaming services, old recorded content, gaming and DVD/Blu-ray viewing.

Source: Kantar Media's Mind 2023 database N=22814 est. 3.7 million 15-74-year-olds
Total TV = Yle and commercial TV channels, online TV, advertising-funded and subscription-paid streaming services

CTV – digital advertising on the TV screen

Connected TV (CTV) means content from TVs and streaming devices connected to the Internet (such as Smart TVs, Apple TV, Chromecast) that are transferred via the network from the content provider to the TV screen without an operator or cable provider in between.

CTV offers advertisers more precise targeting and interactive advertising opportunities.

The share of CTV advertising in Finland is still small. The most significant part of TV advertising consists of linear and VOD advertising. In the future, CTV content is expected to grow as it offers advertising formats that combine traditional TV advertising with digital precise targeting.

The advertising formats offered by CTV include:

- Addressable TV ads, i.e. advertisements that adapt to the viewer profile and can be targeted to individual households.
- In-stream video advertisements that are shown in connection with streamed content (before, during or after a show).
- Interactive ads where viewers can click, browse products or participate in surveys directly on the TV screen.
- Home screen ads that appear in the main menu of streaming services or a smart TV.
- Companion banner ads, i.e. small, static or animated ads that appear while viewing a program.

CTV equipment in Finland

| | |
|---------------------|-----------|
| SMART TVS | 1,742,000 |
| SMART TV ONLINE | 1,359,000 |
| HYBRID TV | 500,000 |
| HYBRID TV ONLINE | 446,000 |

Source: Finnpanel; TV Households in Finland 2024

Finland will switch to HD broadcasting in spring 2025, and the number of CTV equipment is likely to grow at the same time. HD transition means that all TV broadcasts will become high-definition after a phased transition period. Standard-format broadcasts, i.e. SD broadcasts, will first end on Yle in spring 2025 and, during the summer, also on other Finnish TV channels. The change affects both antenna and cable TV reception.



THE FINNISH COMMERCIAL TV MARKET IS STRONG

There are more than 15 commercial TV channels in Finland



sanoma



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EUROSPORT



Discovery

The WALT DISNEY Company

STAR
CHANNEL



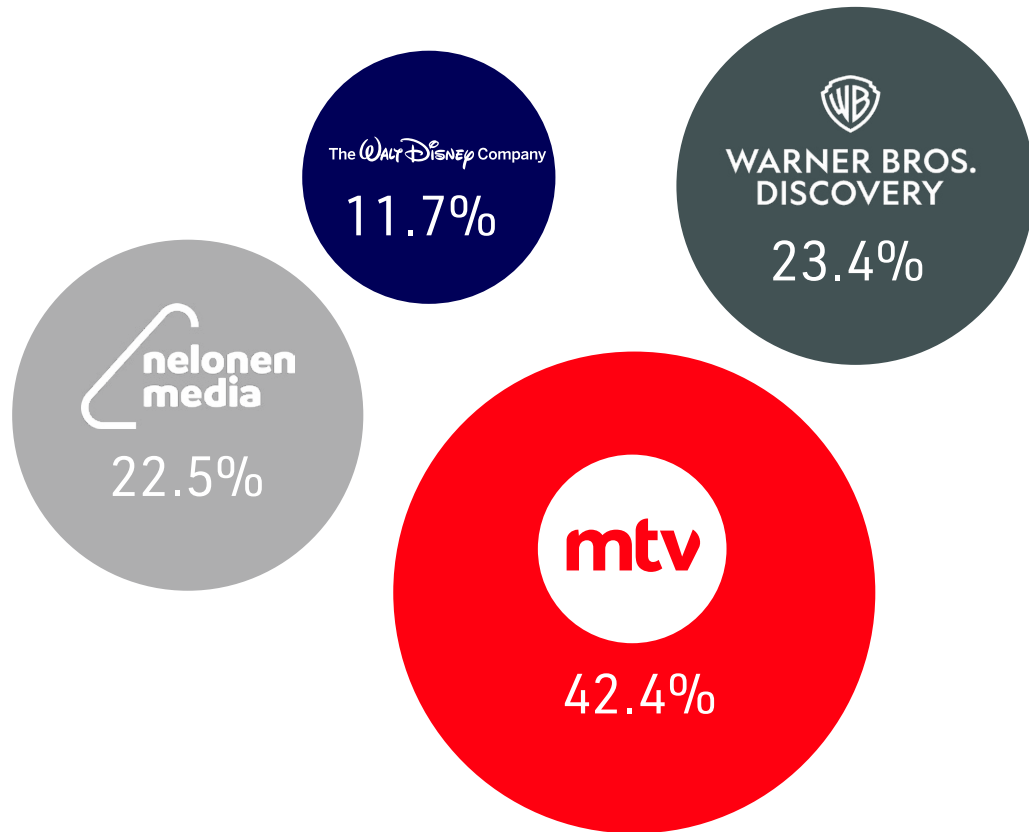
Streaming services



max



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



Source: Finnpanel; TV Audience Measurement, 2024



63%

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

Source: Finnpanel; TV Audience Measurement 2024

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 consumers have traditionally had to pay for commercial TV 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, the 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 Finnish 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 is facilitated by the fact that we have exceptionally unlimited and high-quality internet connections globally and a high device penetration. 97% of households have internet access.*

Data quality and transparency: In Finland, the quality of data and the transparency of advertising are among the best in the world on 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.

CTV and HD transition: Television broadcasting in Finland will experience a significant change from spring 2025 onwards, when most of the broadcasts on basic SD channels will change to HD broadcasts. This applies to both antenna and cable TV networks.

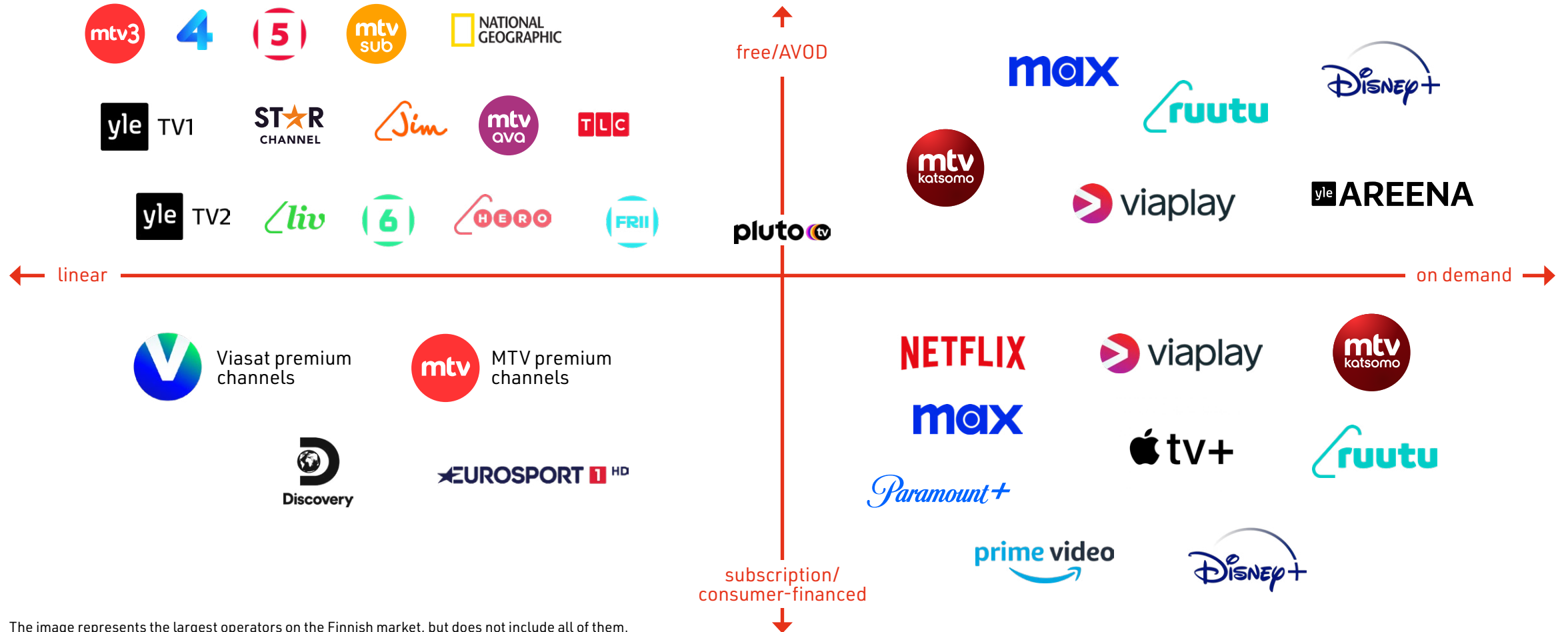
FAST channel consumption and offering still limited: Due, among other things, to the high-quality free content and age structure, the consumption and supply of streaming channels consumed via the Internet that are similar to linear TV channels are still low in Finland.

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

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

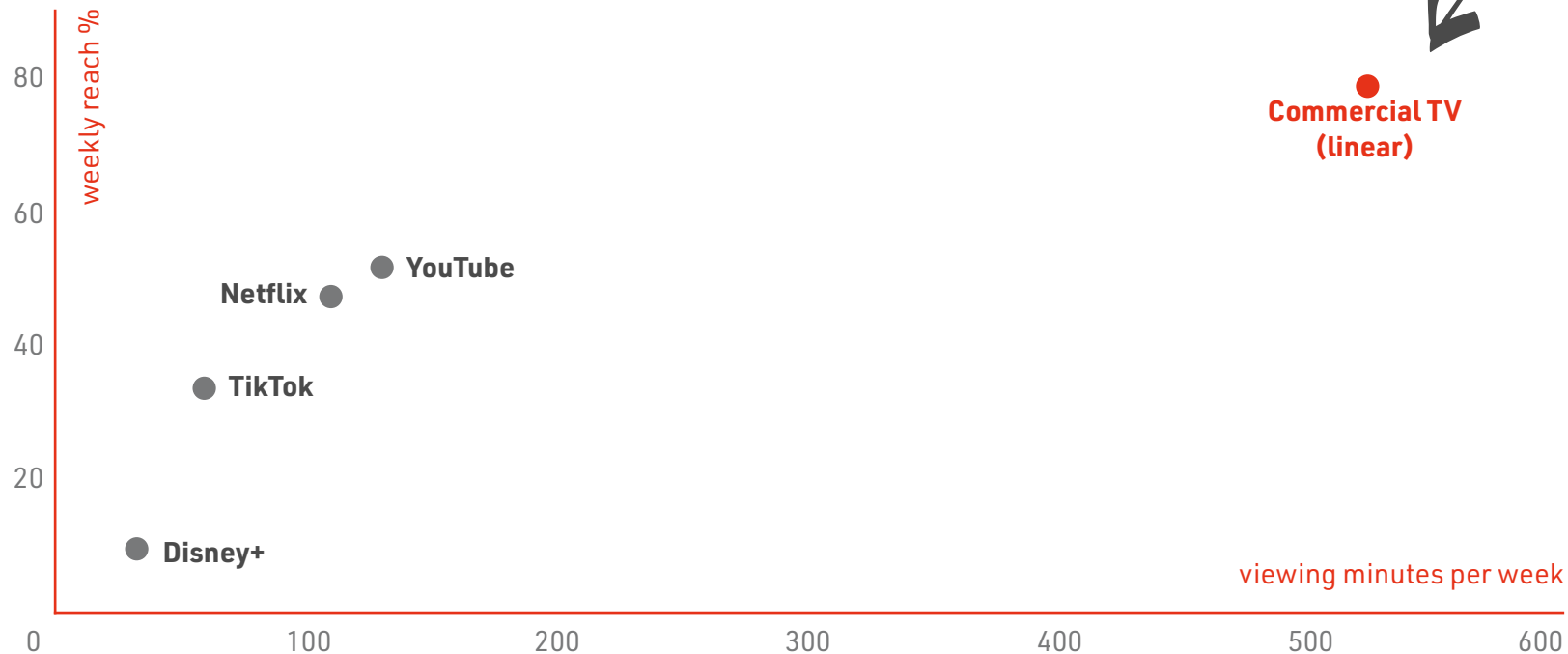


Total TV market in Finland: Streaming service models in transition



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



Commercial TV operators offer **the greatest reach** of the entire video field.



Source: Finnpanel; Total TV Measurement, weeks 36–52, 2024

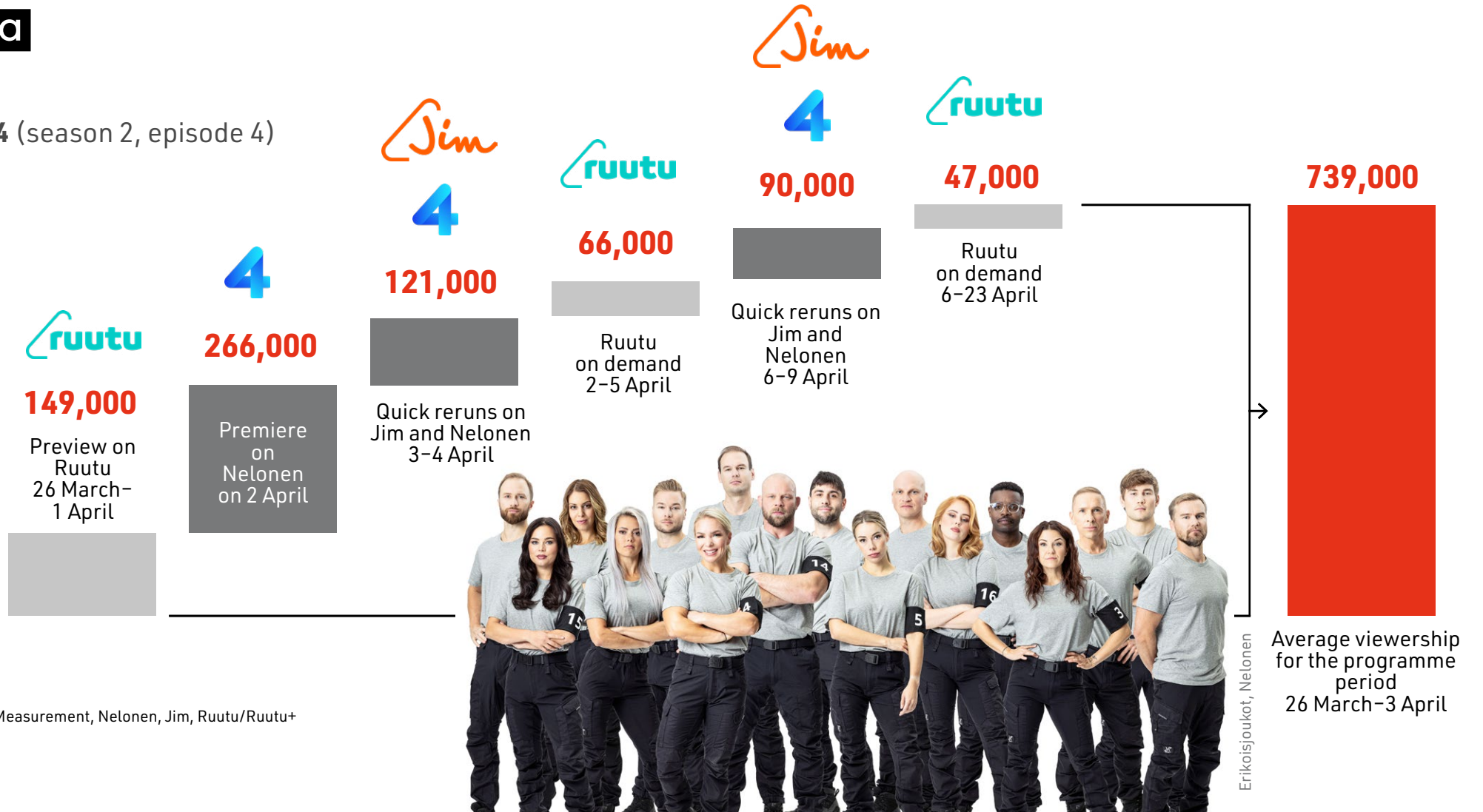
Commercial TV (linear) = commercial TV channels of Nelonen Media, Disney, MTV and WBD

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

Average viewership development for an individual episode , 3+

s a n o m a

Erikoisjoukot 2024 (season 2, episode 4)



Source: Finnpanel Oy, Total TV Measurement, Nelonen, Jim, Ruutu/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.

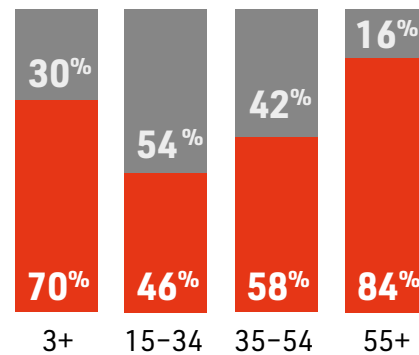


Live entertainment and news are still predominantly viewed on the TV channel.

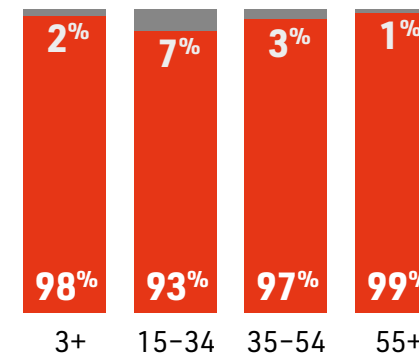


MTV
KATSOMO

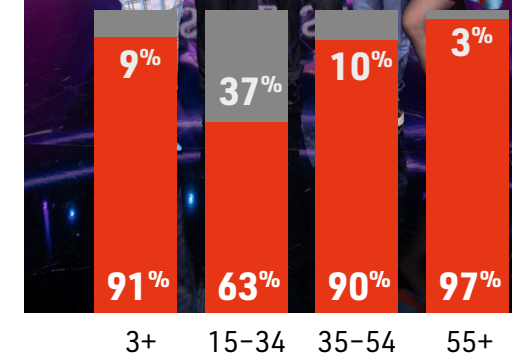
MTV
TV CHANNELS



Ensitreffit alttarilla



Kymmenen uutiset



Masked Singer

Masked Singer Suomi, MTV Oy, camera: Saku Tiainen

Live sports appeal to viewers



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Youth U20 Ice Hockey World Championships

reach: **2.5 million**

Average number of spectators:
319 K

Wimbledon Tennis Tournament

reach: **892,000**

Most watched game, doubles final:
468,000 (reach)
147,000 (average spectatorship)

Snooker World Championships

reach: **993,000**

Most watched game World Cup final S4:
412,000 (reach)
140,000 (average spectatorship)

Olympic basketball

reach: **1.9 million**

Most watched game, basketball final:
426,000 (reach)
167,000 (average spectatorship)

Source: Finnpanel; TV Audience Measurement, over 3-year-old Finns



56 % of all viewing is local content

Most watched TV genres in Finland in 2024

(% of commercial channel views)

| | | |
|------------------------------|-----|---|
| Series and films | 37% | ■ |
| Entertainment and reality TV | 29% | ■ |
| News and current affairs | 17% | ■ |
| Sports | 8% | ■ |
| Documentary and lifestyle | 7% | ■ |
| Children's programming | 1% | ■ |



Source: Finnpanel Oy, TV Audience Measurement 2024, including commercial channels for which genre information is available



TV ADVERTISING IS NOTICED

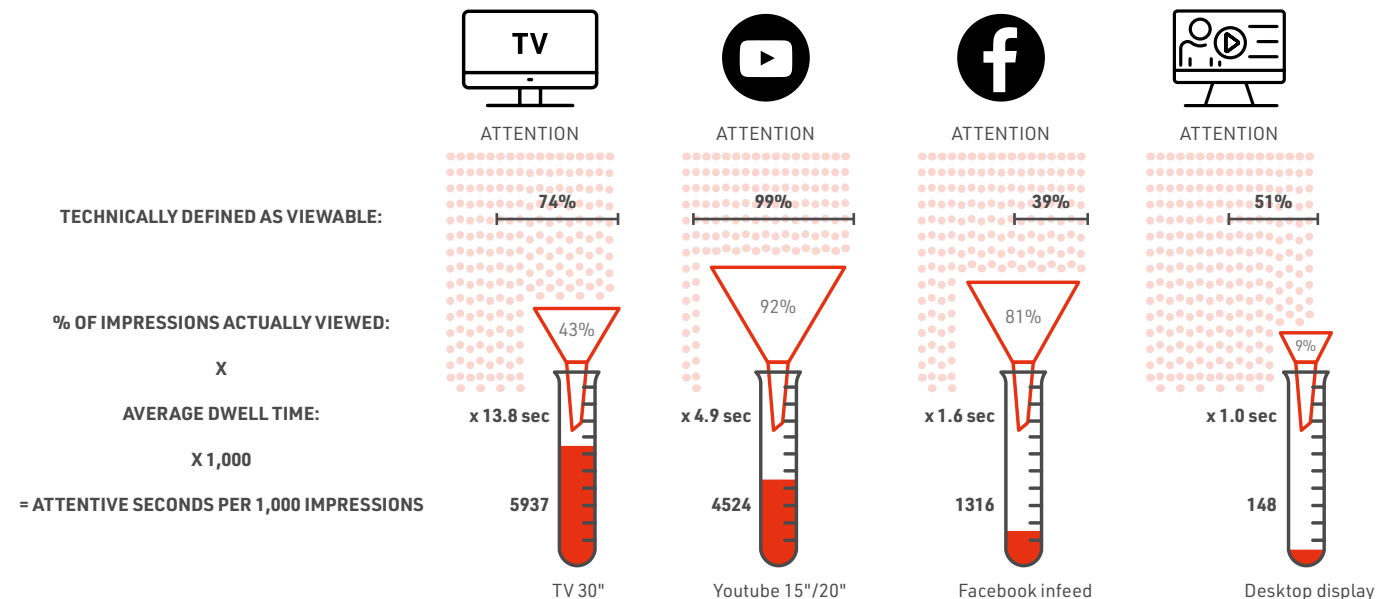


Attention measurement

- Attention in media advertising indicates how much and how deeply consumers pay attention to advertisements in different media environments.
- Attention is a broader and more precise indicator than OTS (opportunity to see) or viewability. It measures how much attention the audience actually pays to the ad.
- Advertising planning and targeting towards media where advertisements are noticed improves the advertiser's revenue. A growing number of studies show that attention indicators predict the business impact of advertising better than viewability alone.
- Visual attention measures both implicit and explicit processing, and research has shown it to be linked to sales growth.
- Attention data can be used to improve the planning of creative implementation.
- Attention measurements can be used to reduce the carbon footprint of media advertising; better targeted campaigns reduce the loss caused by advertising, which makes it possible to achieve both financial and ecological benefits at the same time.

Attention funnel:

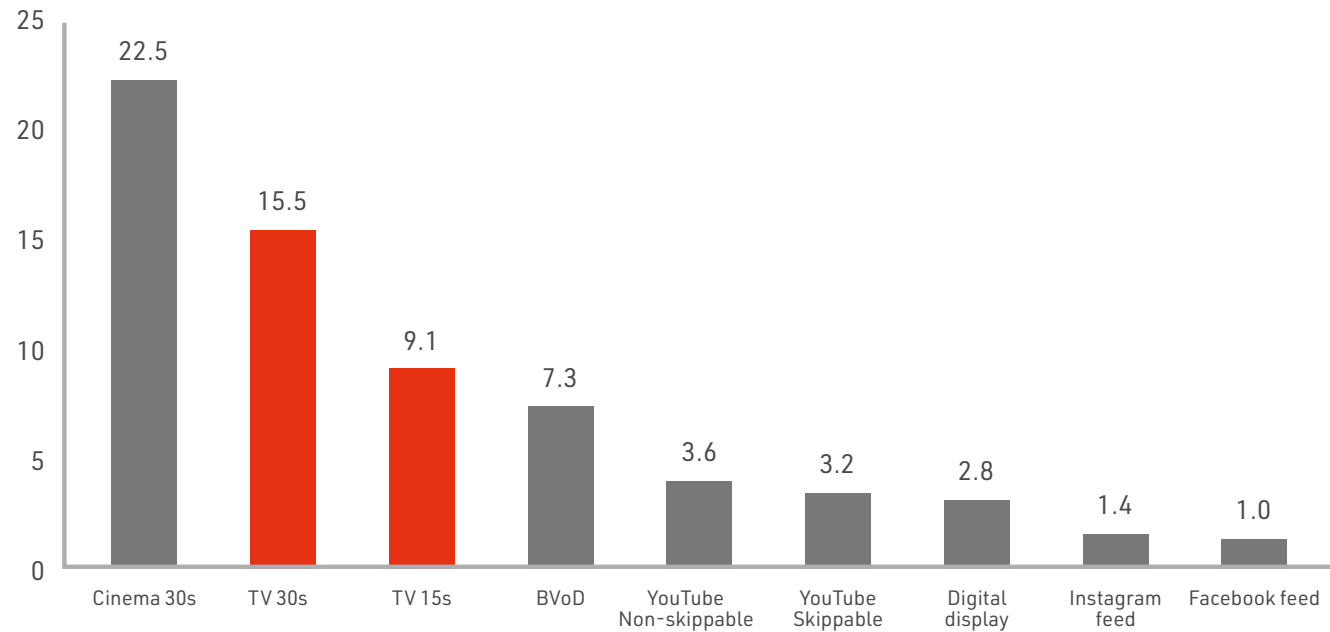
What people can see (whether or not it is technically viewable), compared to what people actually look at and how long they look at it.



- [More information about Attention Measurement](#)

TV advertisement catches the viewer's attention

Average APM values of different media groups,
attention per 1,000 impressions

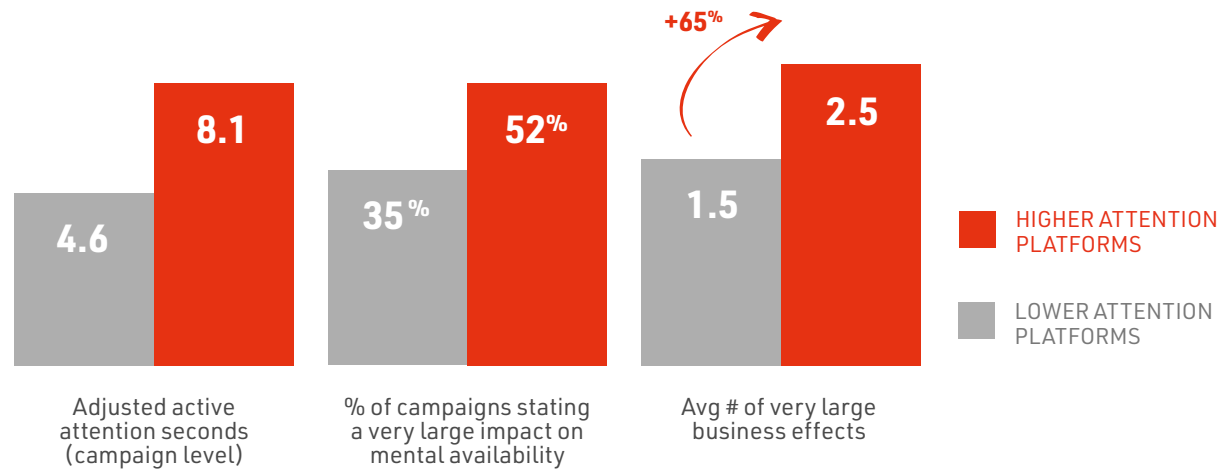


APM = Attention per 1,000 impressions

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



TV enables greater impact



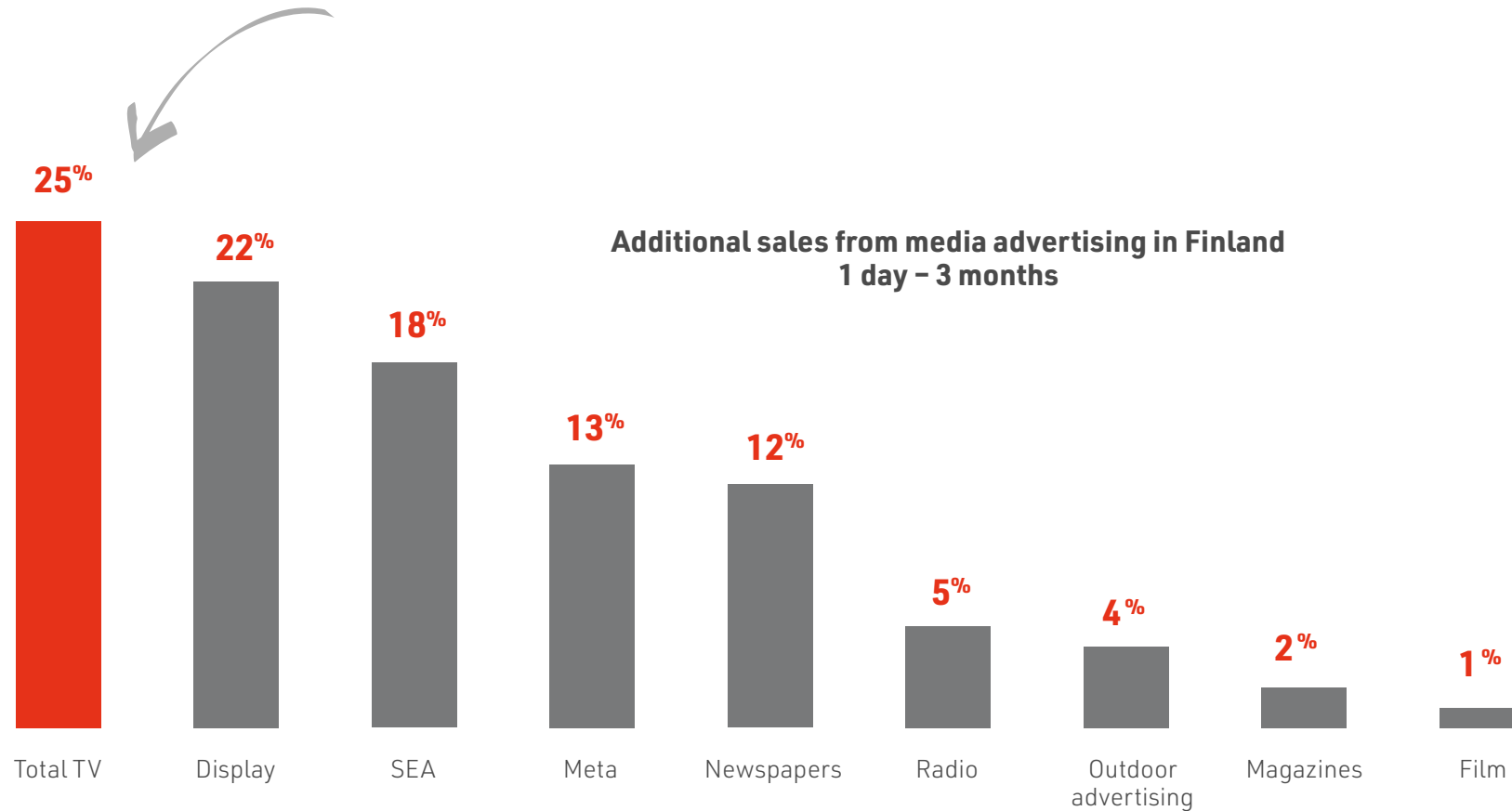
Investing in higher attention media platforms enables more impactful creative implementation.



TV ADVERTISING RESULTS

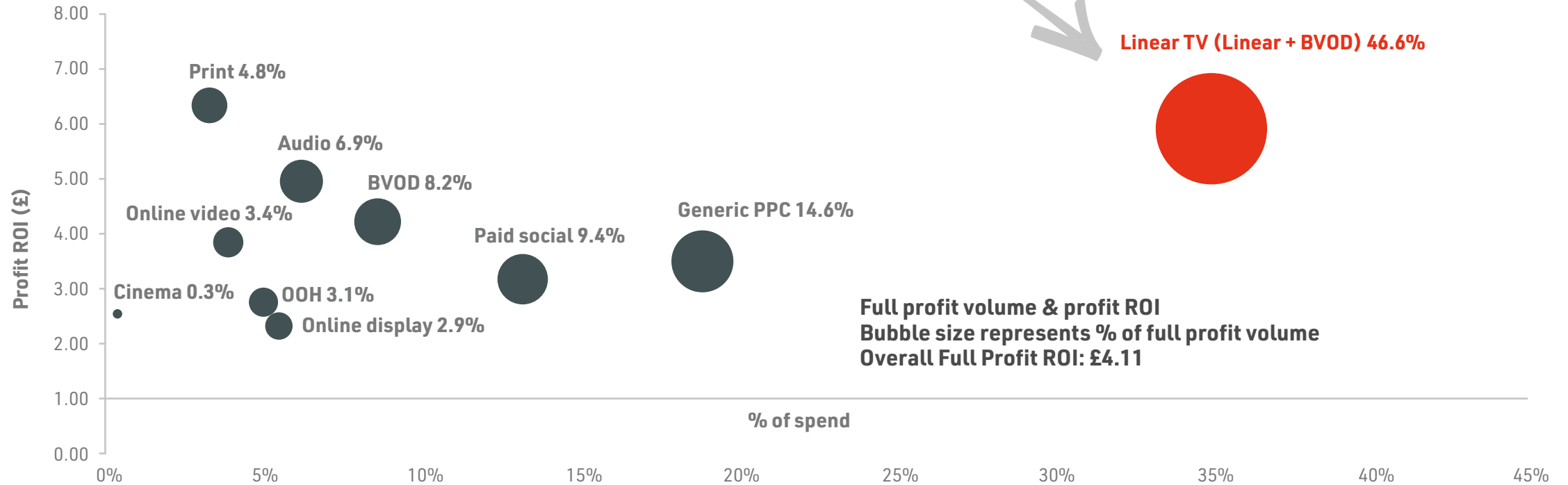
AMAZING
RACE
SUOMI

Total TV generates the most additional sales

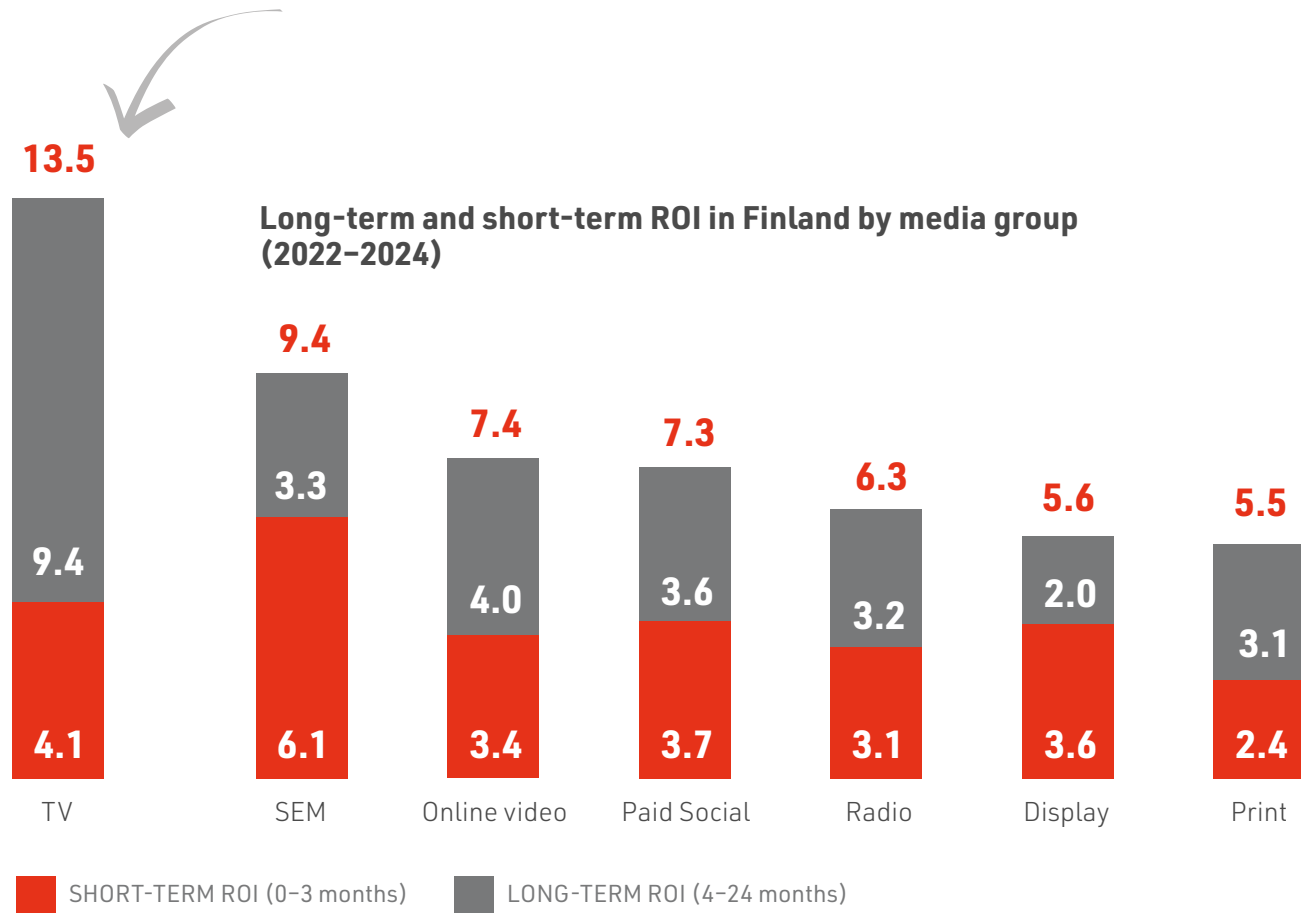


Source: Meta-analysis of econometric modelling in Finland 2024. Implemented by: Dagmar Oy. The modelling included 69 brands & 38 companies, 121 modellings, 260 million euros spent on media. Period 2016-2023. Short-term: 0-3 months.

TV advertising yields the best profits



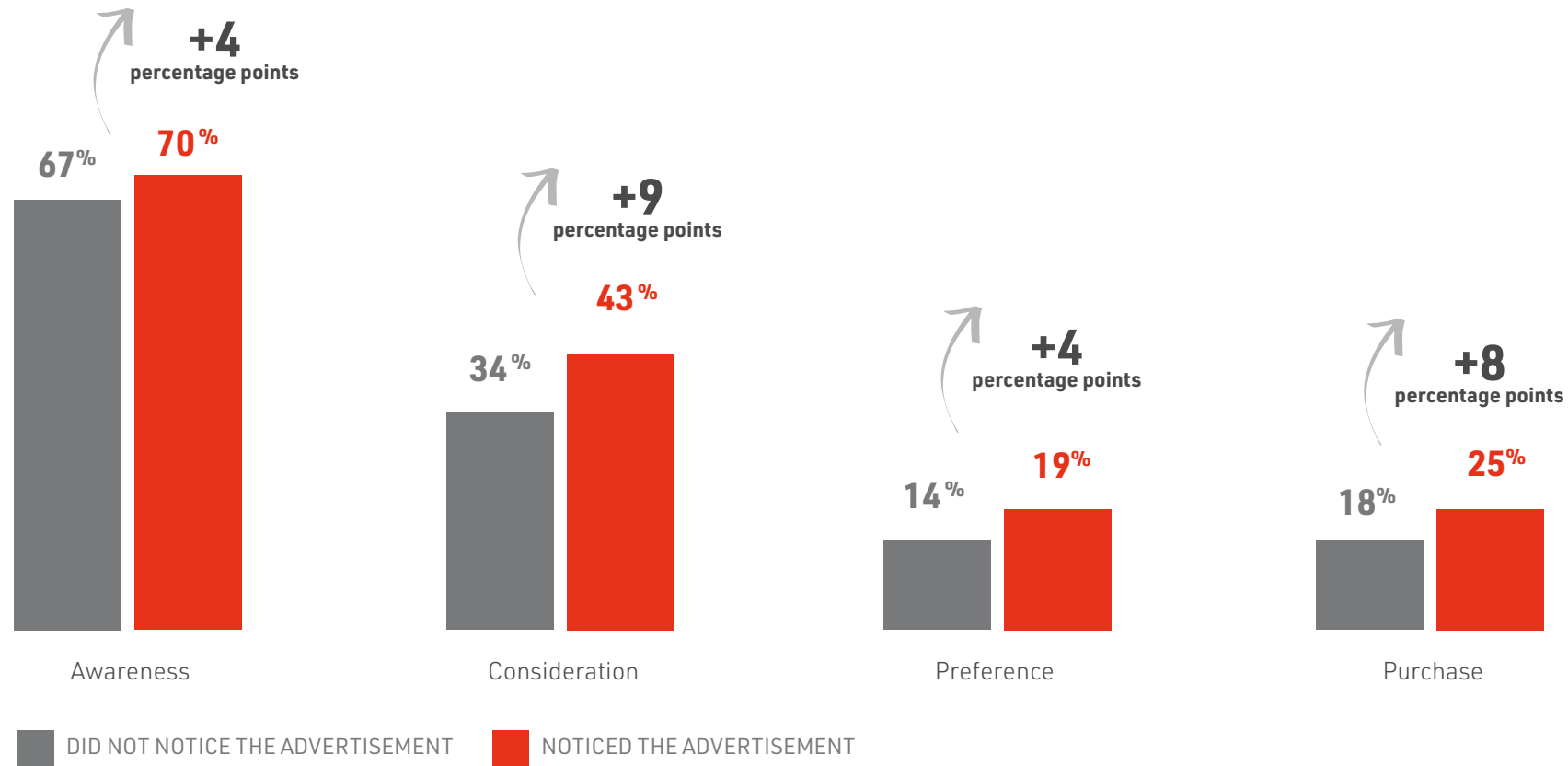
TV advertising is a significant ROI driver – especially in the long term



- In the short term, TV advertising will bring a four-time return on investment.
- In the long term, the total return is 13.5, which differs clearly from search engine advertising, which performs well due to its good short-term return.
- Compared to other Nordic modellings, it became apparent that the ROI of TV advertising in Finland is higher than the Nordic average.

Source: Acceleration Nordic, more than 200 sales modellings from the Nordic countries, 8 retail modellings in Finland, 2020–2023, Long-term coefficient from the 'Profit Ability: the business case for advertising' study in 2017 and 2024

TV advertising has proven brand impacts: the most impactful areas are brand consideration and purchase



Brand lift = the difference in the advertiser's brand key indicators between those who noticed and those who did not notice the advertising

Tips for small-budget TV advertisers

A TV campaign does not always require a big budget:

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

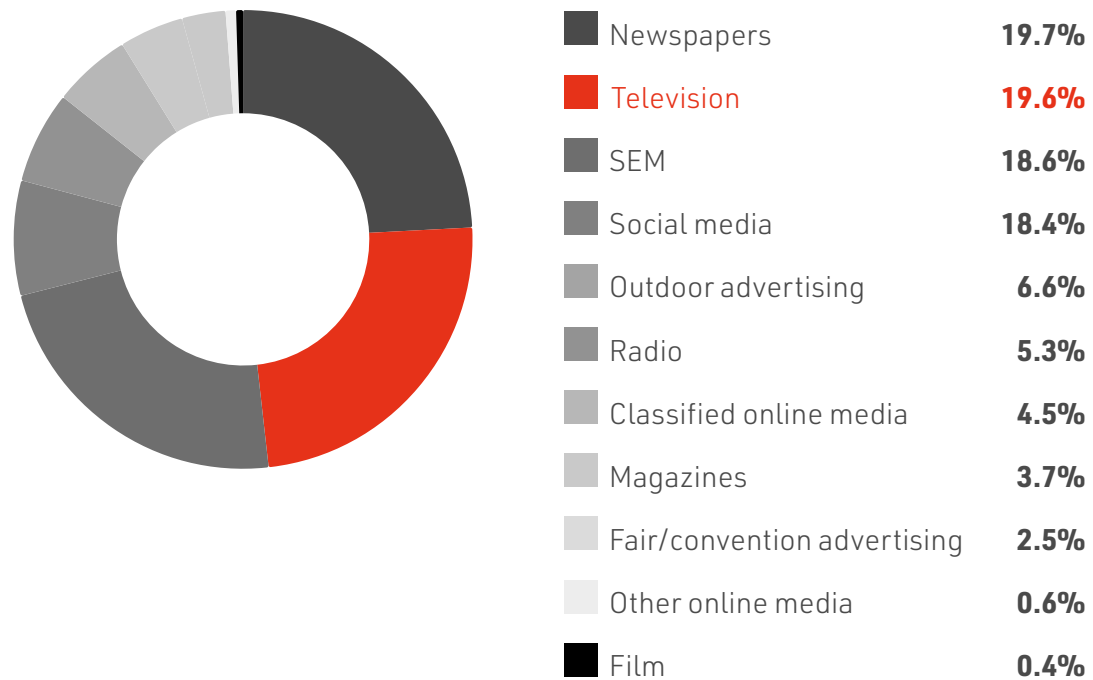
Studies show that:

- 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). **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 media advertising per media group



Digital television advertising grew by **16.1%** year-on-year in 2024.

The total amount spent on television advertising increased by **3.5%**

Spent on TV advertising
254.9 million euros
in 2024

(total EUR 1,301.9 million for all media advertising)

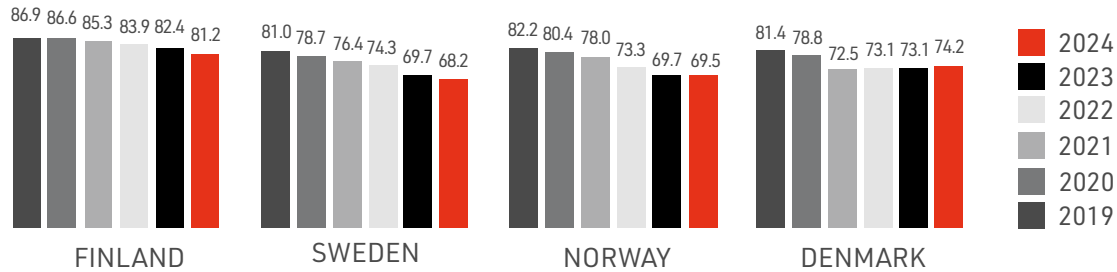
FINLAND RANKS HIGH INTERNATIONALLY



Finns watch the most TV in the Nordic countries

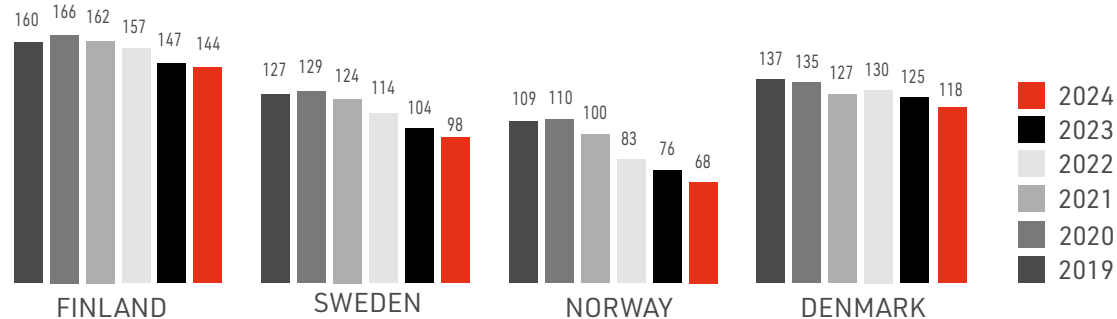
TV weekly reach in Finland and other Nordic countries from 2019 to 2024

WEEKLY REACH %



Daily TV viewing minutes in Finland and other Nordic countries from 2019 to 2024

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.

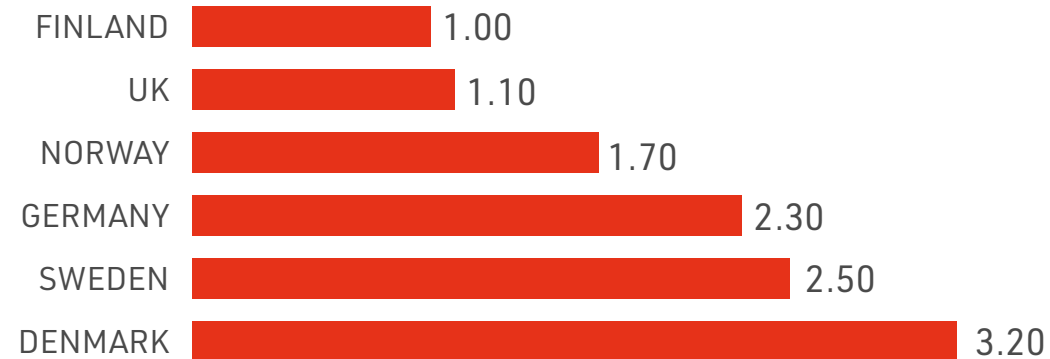
Source: over 3 years of age, Finnpanel (Finland); TND Gallup (Denmark and Norway), MMS (Sweden).

Note! Measurement methods vary from country to country, which affects the comparability of the figures



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

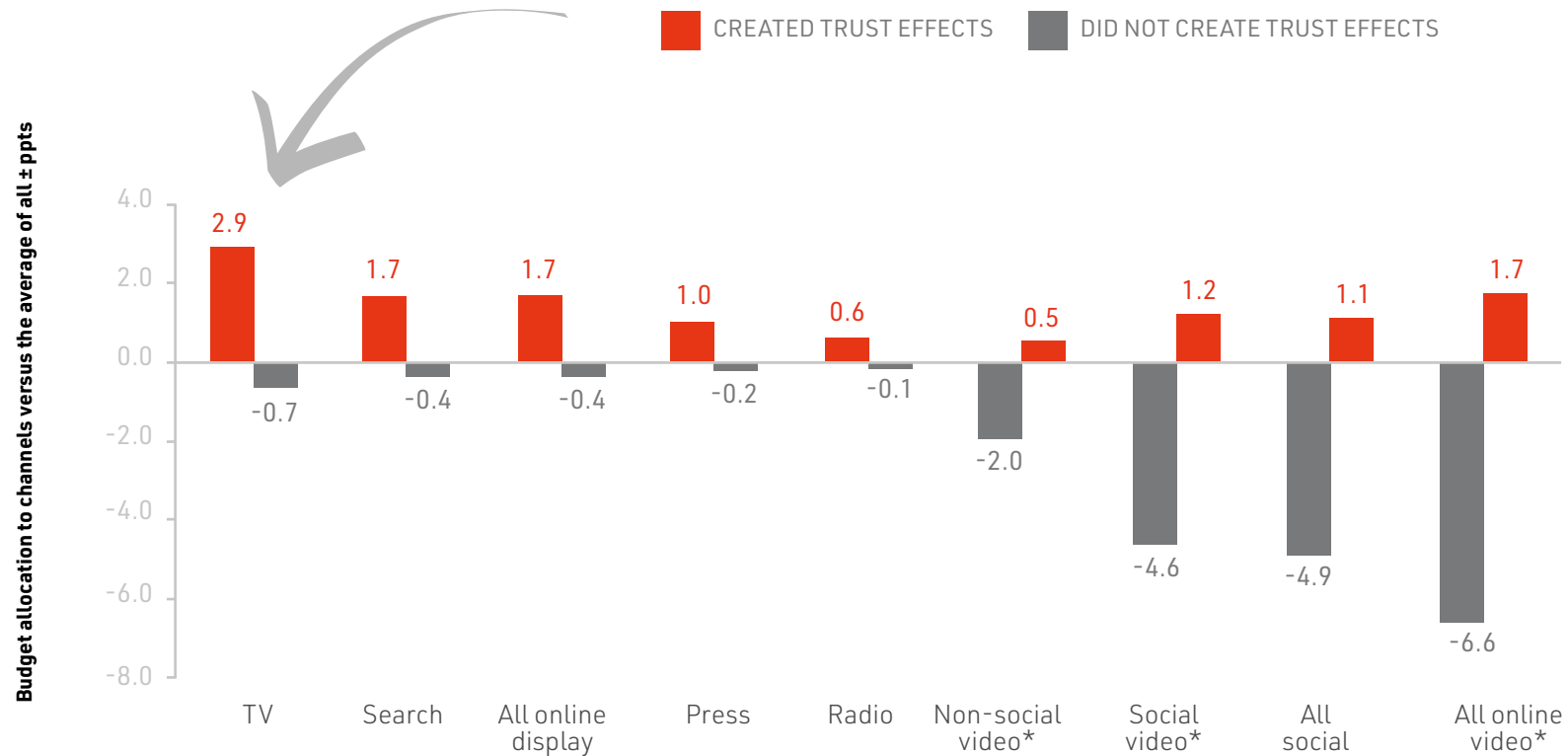
CPT gross price index (Finland = 1.00)



Source: Dentsu 2/2025, CPT gross price comparison, 15+ and 25-49 years average

TV ADVERTISING IS RELIABLE AND TRANSPARENT

People trust TV advertising, and in TV, your message is in a safe environment

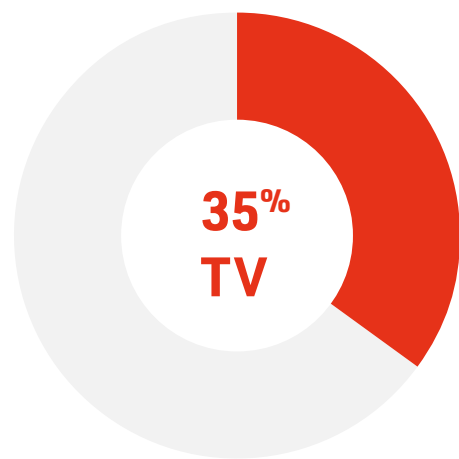


Source: IPA Databank 2014-2022 for profit case * data available from 2016

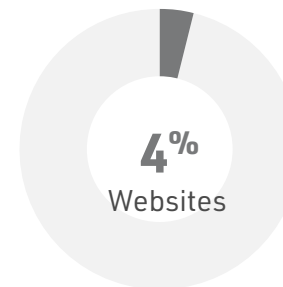
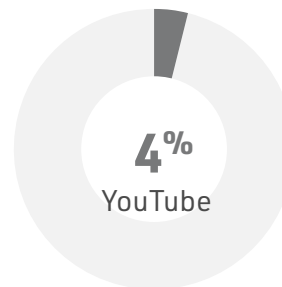
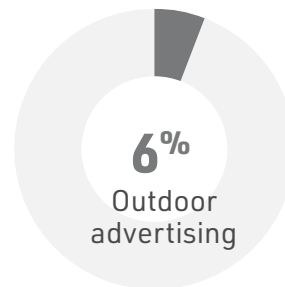
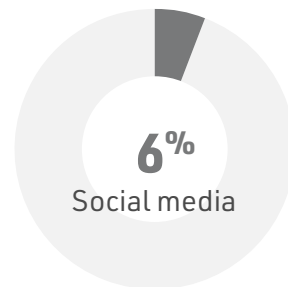
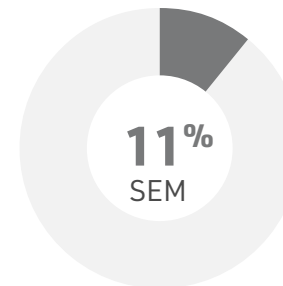
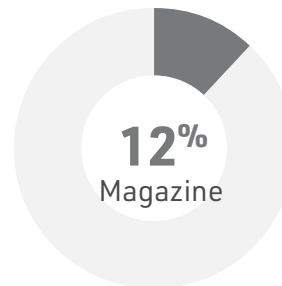
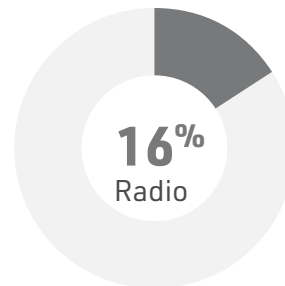
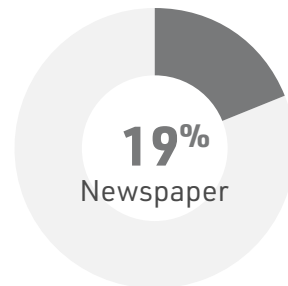


Consumers trust TV advertising

“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.

In Finland, **76%** trust the TV.



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

TOTAL TV'S AUDIENCE MEASUREMENTS PRODUCE RELIABLE DATA





TV and video audience measurements produce 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

MEASUREMENT OF SPOTON VIDEO ADVERTISING

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

SpotOn advertising measurement

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

Reliable and transparent indicators have always been vital for advertising and responsible media. They provide relevant information for the planning, analysis and marketing of advertising campaigns. In autumn 2024, commercial TV companies operating in Finland launched the SpotOn survey, which brings common reach and contact figures for TV, streaming service and online video campaigns to the market.

Benefits of SpotOn measurement for the market and advertisers:

- 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.
- Uniform key figures for TV and online video campaigns by target group;
 - TRP
 - Reach (net) and repetition
- Updated daily, data available on the following day
- Method validated by a third party
- A common solution for the TV industry, based on common rules. Other operators also have the opportunity to participate.



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 Spotgate tags 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



* The households have a total of 1,440 TVs, 1,910 phones, 1,470 PCs, 615 tablets and 355 game consoles

Source: Finnpanel Oy 2024, Total TV Measurement





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