

Finnish Mass Media 2017

Mass media market

Small growth in the mass media market - households now spend on video on-demand services

The value of the mass media market was about EUR 3.8 billion in 2017. Compared to the year before, the value of the market grew by 1.4 per cent or EUR 53 million. The data are based on the calculations of Statistics Finland's mass media and cultural statistics.

Mass media market 2016 - 2017, EUR million

	2016	2017	2017	Change
	EUR mill.	EUR mill.	%	2016-17, %
Daily newspapers (7-4 times a week) ¹⁾	807	785	20.7	-2.8
Other newspapers ¹⁾	135	136	3.6	0.4
Free-distribution papers ¹⁾	68	68	1.8	0.7
Magazines and periodicals ¹⁾	490	470	12.4	-4.1
Books ¹⁾³⁾	527	549	14.5	4.2
Publishing, total	2 027	2 008	52.9	-0.9
Television ²⁾	1 110	1 134	29.9	2.2
Radio	64	67	1.8	4.1
Internet advertising	324	370	9.8	14.2
Electronic media, total	1 499	1 572	41.4	4.9
Audio recordings ¹⁾	59	64	1.7	8.5
Videos (dvd, blu-ray)	61	46	1.2	-24.9
Cinemas	96	105	2.8	9.4
Recorded media, total	217	216	5.7	-0.6
All total	3 742	3 795	100.0	1.4

Source: Statistics Finland, Mass media and cultural statistics

1) Digital sales included.

2) Includes all of Yle public service (tv, radio, web-service).

3) Due to a change in compilation of statistics, the results in 2017 are not totally comparable with previous results.

Publishing (incl. newspapers, free-distribution papers, periodicals and books) is still clearly the biggest sector by its volume in the Finnish media market. However, the sales of daily newspapers and periodicals

continued their nearly decade-long fall in 2017, which pressed down the entire publishing. In turn, book sales have grown in the past few years, although due to renewals in statistics compilation the latest data cannot be fully compared with the previous years' figures. Statistics Finland's calculation is based on the data of the Booksellers Association of Finland and the Finnish Book Publishers Association.

In 2017, television was the biggest individual media activity with its volume of good EUR 1.1 billion. The television industry here includes the entire activity of the Finnish Broadcasting Company, television advertising in commercial television and subscription fees to television services, which are cable TV basic fees and pay TV fees (incl. video on-demand services such as Netflix).

In 2017, the television industry grew boosted by pay TV by good two per cent from the previous year. According to the data collected by Finnpanel, an ever growing share of households follows video on-demand services. Various pay TV fees form an increasingly bigger part of households' media consumption expenditure. This appears from Statistics Finland's Household Budget Survey published this year. In contrast, the amount and share of television advertising in television revenues continued declining.

Internet advertising grew by over 14 per cent from the previous year and was around EUR 370 million in 2017.

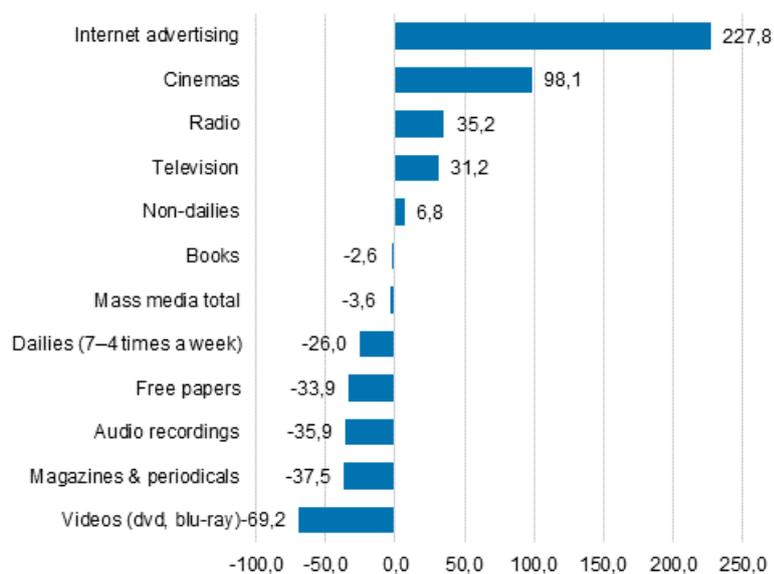
The year 2017 was also favourable for the audio media: audio recordings are estimated to have grown by good eight per cent and commercial radio by good four per cent from the previous year. The audio market is now boosted by digital sales, which according to IFPI Finland's data, already covered 83 per cent of Finnish recording sales in 2017. Radio advertising has, in turn, grown fairly steadily for several years.

The year 2017 also brought clear growth to cinemas compared to the previous year. Cinema ticket sales and cinema advertising grew in total by good nine per cent. According to the Finnish Film Foundation's data, 8.8 million visits were made to cinemas in Finland last year. Domestic films gathered 2.4 million viewers (27 per cent of all cinema visits); by far the most the film *Unknown Soldier* that was re-filmed in 2017.

According to the European Audiovisual Observatory, the video recording market contracted by around 25 per cent from the previous year. The data include selling of DVD and Blu-ray discs and renting of Blu-ray films but renting data of DVD films are missing from the calculation this time.

Despite the small growth recorded now, the size of the mass media market has decreased further relative to the entire national economy. In 2017, the share of mass media in GDP was 1.7 per cent, while it was 2.1 per cent ten years earlier. From 2007, the mass media market has contracted by 3.6 per cent and the contraction has been quite drastic particularly in videos, audio recordings and publishing.

Changes in the mass media market in 2007 to 2017, %



The calculations presented here describe the mass media market at end user level: for example, the figure on the newspaper market is comprised of retail priced subscription and single copy sales of newspapers, and their revenue from advertising. The figures cover domestic production and imports but not exports. There is some overlap between Internet advertising and other media groups.

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Appendix tables

Appendix table 1. Sector shares of the mass media market 2000 - 2017, per cent

Year	Publishing, per cent	Electronic media, per cent	Recorded media, per cent	Total EUR mill.
2000	72	20	8	3 133
2001	71	21	9	3 176
2002	70	21	9	3 231
2003	69	22	9	3 311
2004	68	23	9	3 464
2005	68	24	8	3 584
2006	67	25	8	3 724
2007	66	26	8	3 938
2008	64	28	8	4 079
2009	63	30	7	3 870
2010	62	31	7	3 995
2011	61	32	7	4 046
2012	60	33	7	4 030
2013	58	35	7	3 904
2014	56	38	6	3 789
2015	55	38	6	3 706
2016	54	40	6	3 742
2017	53	41	6	3 795

Source: Statistics Finland/Media statistics

Appendix table 2. Breakdown of newspaper sales 2000 - 2017, per cent

Year	Dailies		Other newspapers	
	Advertising	Subscriptions and single copy sales	Advertising	Subscriptions and single copy sales
2000	58	42	59	41
2001	56	44	57	43
2002	54	46	54	46
2003	53	47	53	47
2004	53	47	54	46
2005	54	47	53	47
2006	55	45	53	47
2007	55	45	53	47
2008	55	45	54	46
2009	48	52	52	48
2010	49	51	51	49
2011	52	48	50	50
2012	50	50	51	49
2013	47	53	48	52
2014	45	55	48	52
2015	45	55	46	54
2016	45	55	46	54
2017	44	56	47	53

Until 2009 revenues of printed newspapers only. From 2010 onwards revenues of digital sales are included.
 In addition to advertising proper all classifieds including announcements, notices, column advertisements and public offices are also included.
 NB. The figures have been revised in July 2018: breakdown of non-dailies' (other newspapers) sales was previously falsely registered for 2014, 2015 and 2016.
 Source: Finnish Newspapers Association

Appendix table 3. Breakdown of magazine sales 2000 - 2017, per cent by

Year	Subscriptions	Single copy sales	Advertising
2000	59	8	33
2001	59	9	32
2002	60	9	31
2003	61	9	30
2004	62	9	30
2005	62	8	30
2006	62	8	30
2007	63	7	30
2008	64	7	29
2009	69	7	24
2010	70	7	23
2011	68	7	25
2012	70	7	22
2013	73	7	20
2014	74	7	19
2015	74	7	18
2016	77	7	17
2017	77	7	17

The figures are estimates.
 Source: Statistics Finland/Media statistics

Appendix table 4. Radio advertising 2000 - 2017, per cent

Year	National advertising	Local advertising
2000	50	50
2001	53	48
2002	57	43
2003	60	40
2004	63	37
2005	61	39
2006	63	37
2007	69	31
2008	70	30
2009	71	29
2010	74	26
2011	75	25
2012	75	25
2013	73	27
2014	73	27
2015	70	30
2016	70	30
2017	71	29

Source: RadioMedia

Appendix table 5. Television (terrestrial + cable + satellite) revenue 2000 - 2017, per cent

Year	TV licence fee/ Yle tax	Advertising	Subscriptions/ Pay-TV ¹⁾	Subscriptions/ Cable TV basic fees
2000	49	37	3	11
2001	52	33	4	11
2002	50	33	4	13
2003	49	33	4	15
2004	49	33	4	14
2005	48	31	9	11
2006	46	31	12	11
2007	43	30	16	10
2008	40	28	22	9
2009	42	25	23	9
2010	41	27	23	9
2011	40	28	22	10
2012	42	27	22	10
2013	43	26	22	10
2014	43	24	23	10
2015	44	24	23	10
2016	42	23	25	10
2017	42	21	27	10

The figures are estimates.

Source: Statistics Finland/Media statistics

Estimates based on data from: FiCom, Ficora, Finnpanel, Kantar TNS, Company reports

1) Including VOD.

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Source: Mass media and cultural statistics. Statistics Finland