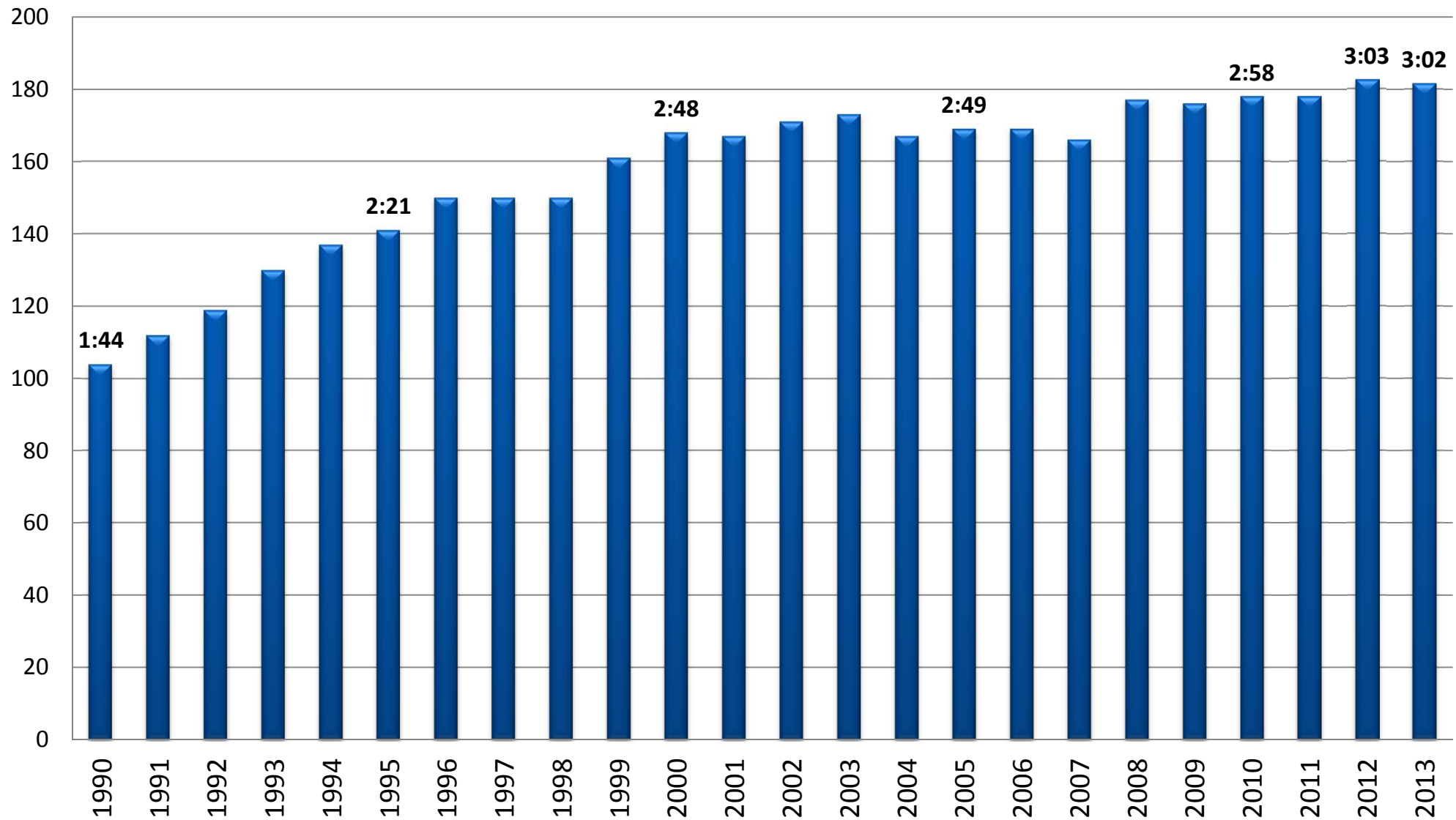


Television viewing in Finland 2013

Tennispalatsi 23.1.2014

Lena Sandell

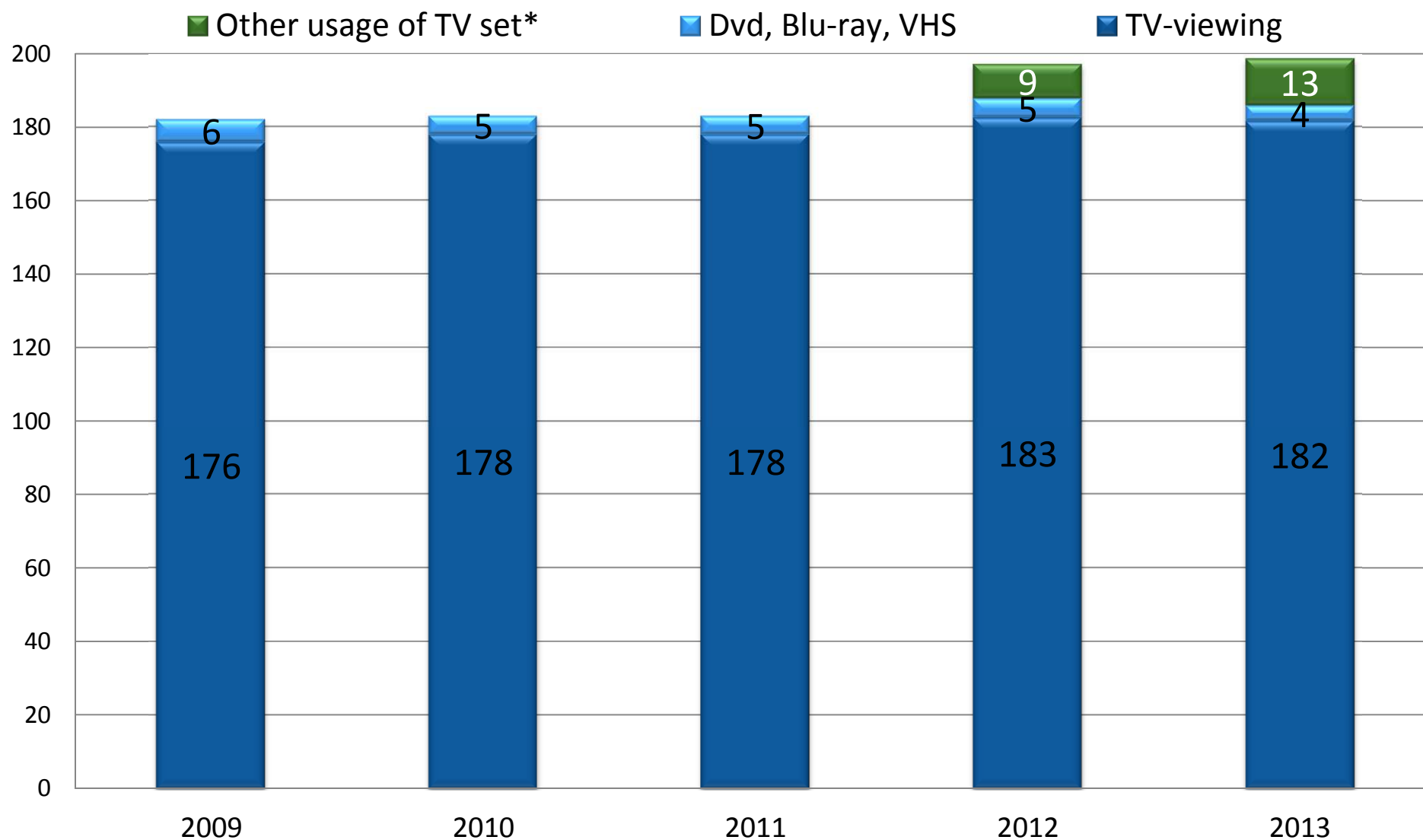
Daily viewing time (hrs;min)



Source: Finnpanel Oy, TAM (population: 10+ years, timeshift and guest viewing included since 2008).



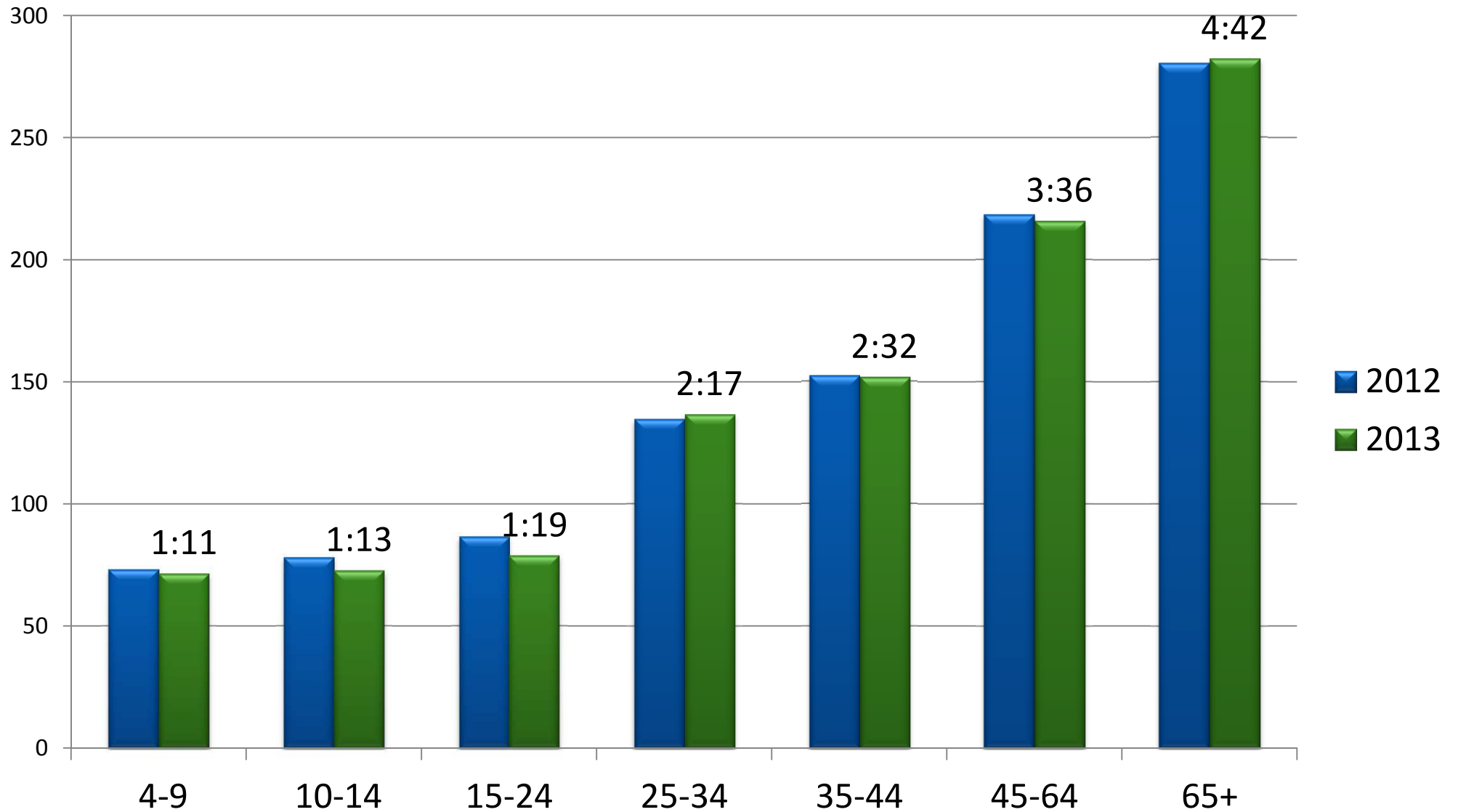
Daily viewing time (min)



* Other usage of TV set: eg. timeshift 7+ days, VOD eg Netflix, games (partly), other usage of smart-tv or peripheral equipment via TV set, non-referenced tv-channels from playback device



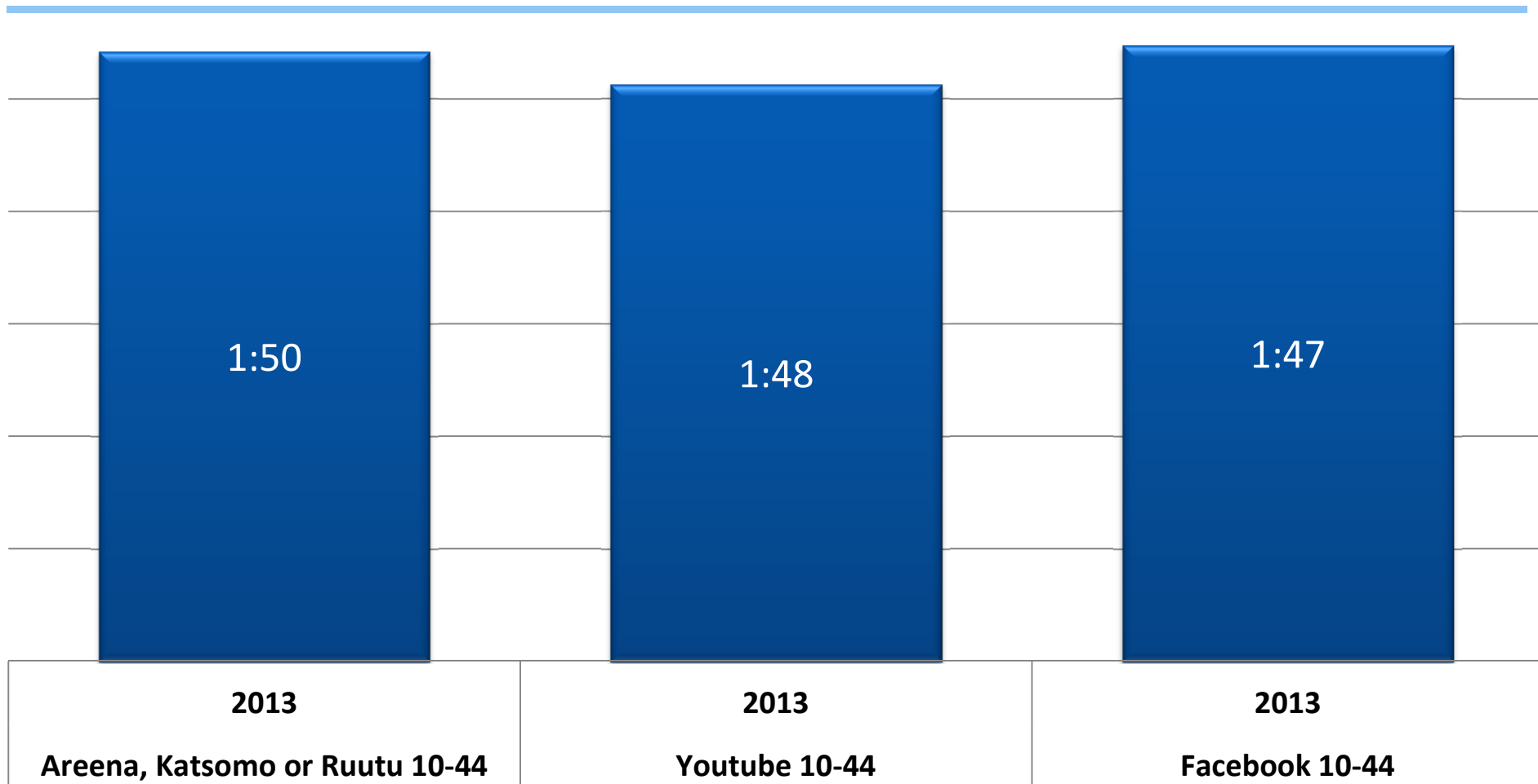
Daily viewing time (hrs;min) by age groups



Source: Finnpanel Oy, TAM , incl. timeshift and guest viewing.

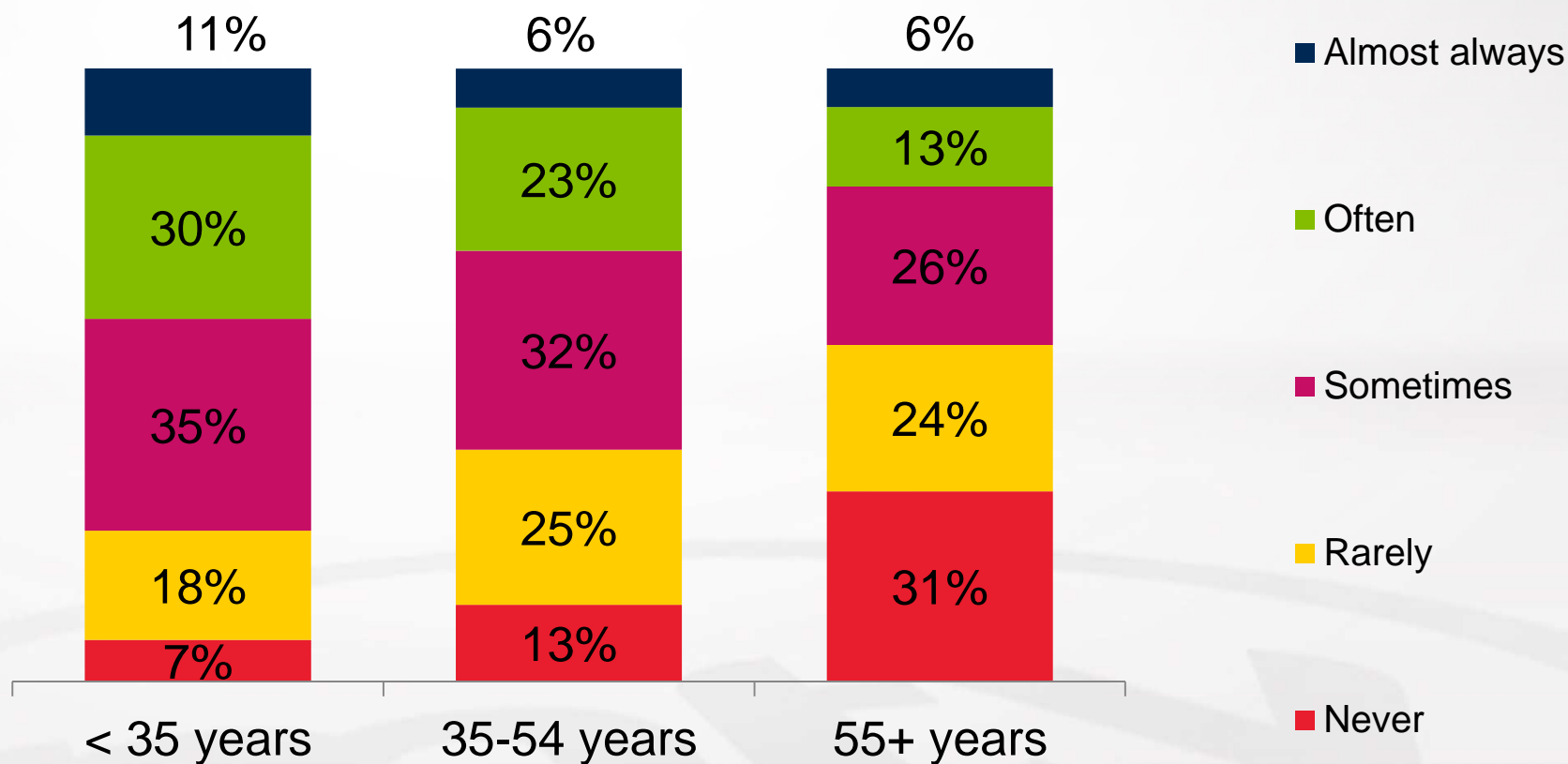
TV viewing of active* users of some internet services

10–44y: Average daily TV viewing 1:56 (2013)

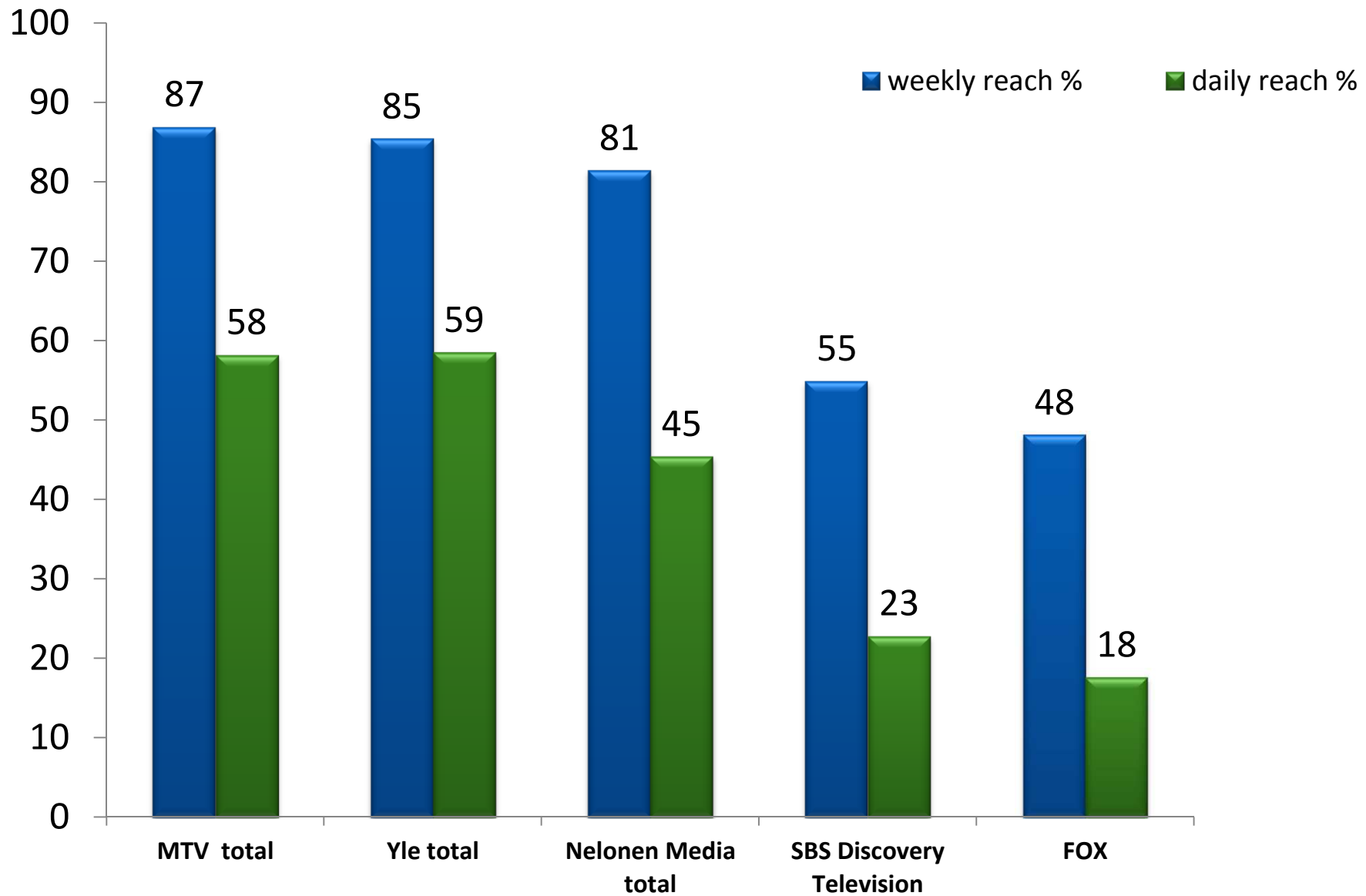


* Using at least once a week

Second Screen: How often do you use internet via computer, tablet or smartphone while watching TV?



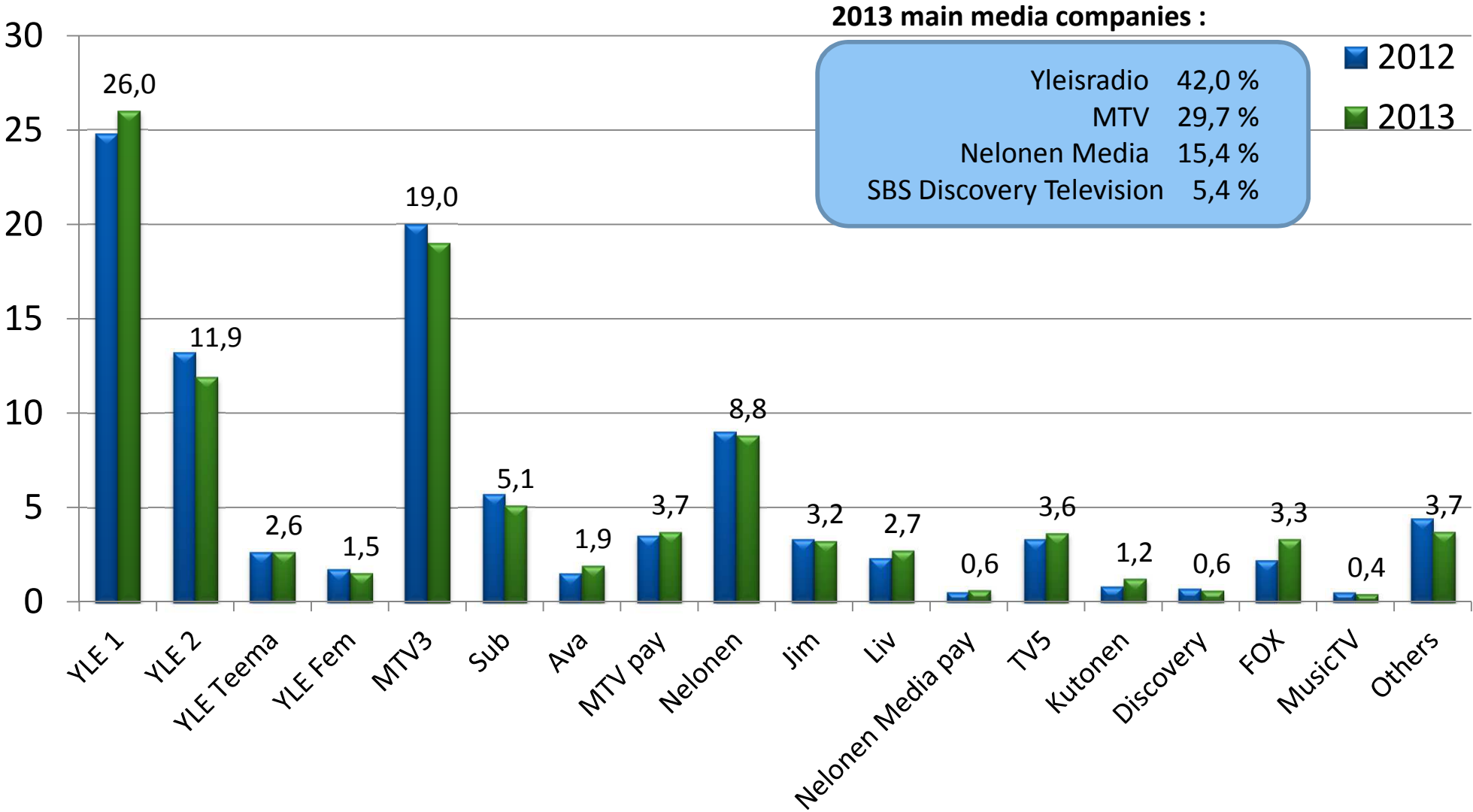
Weekly reach of total television is 92 %



Source: Finnpanel Oy, TAM (population: 10+ years), 2013.



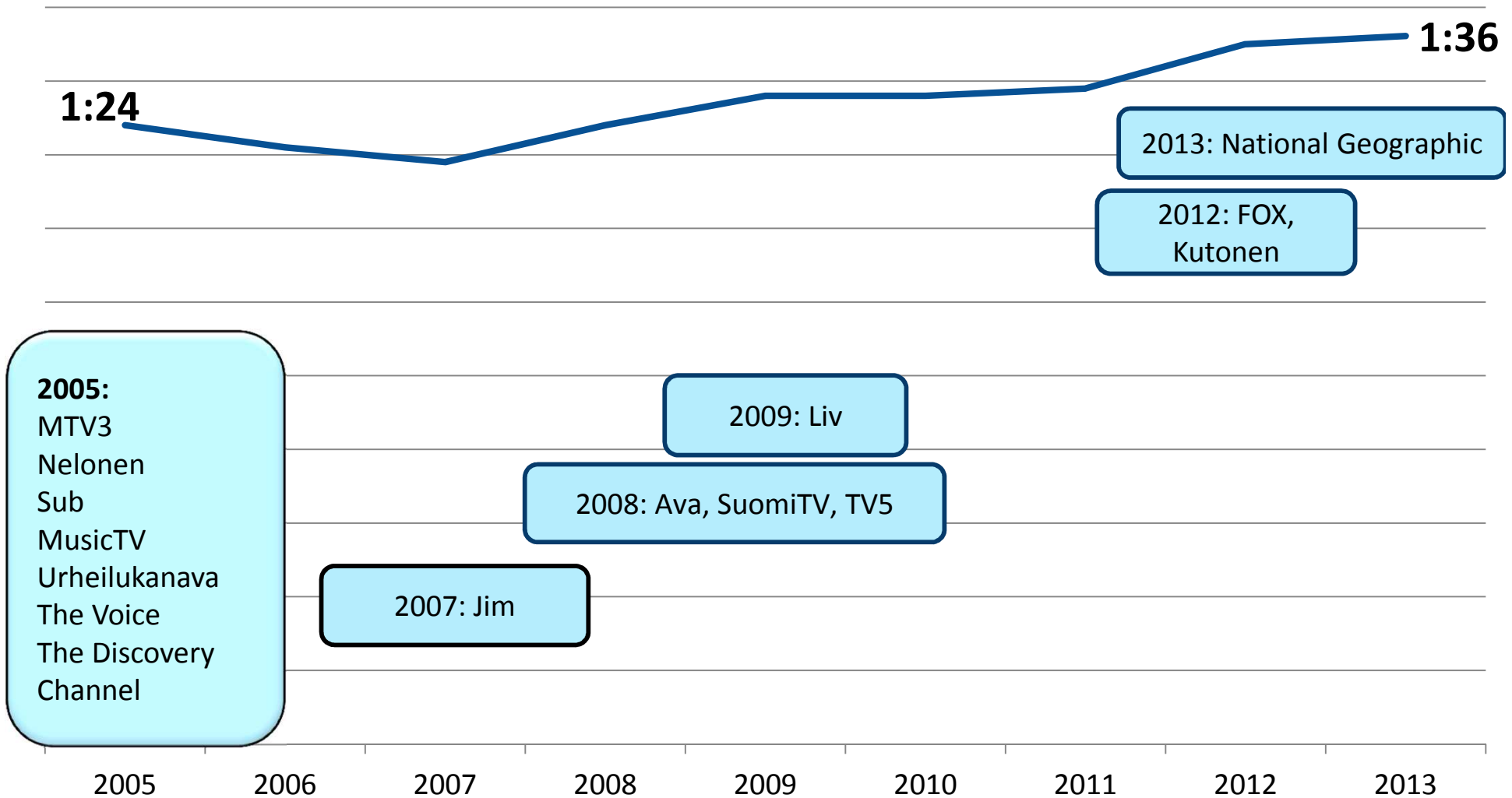
Channel shares (%)



Source: Finnpanel Oy, TAM (population: 10+ years, timeshift and guest viewing included)

*AVA expanded to terrestrial 1.2. -12.
FOX launched 16.4.-12 at SuomiTV's channel frequency.

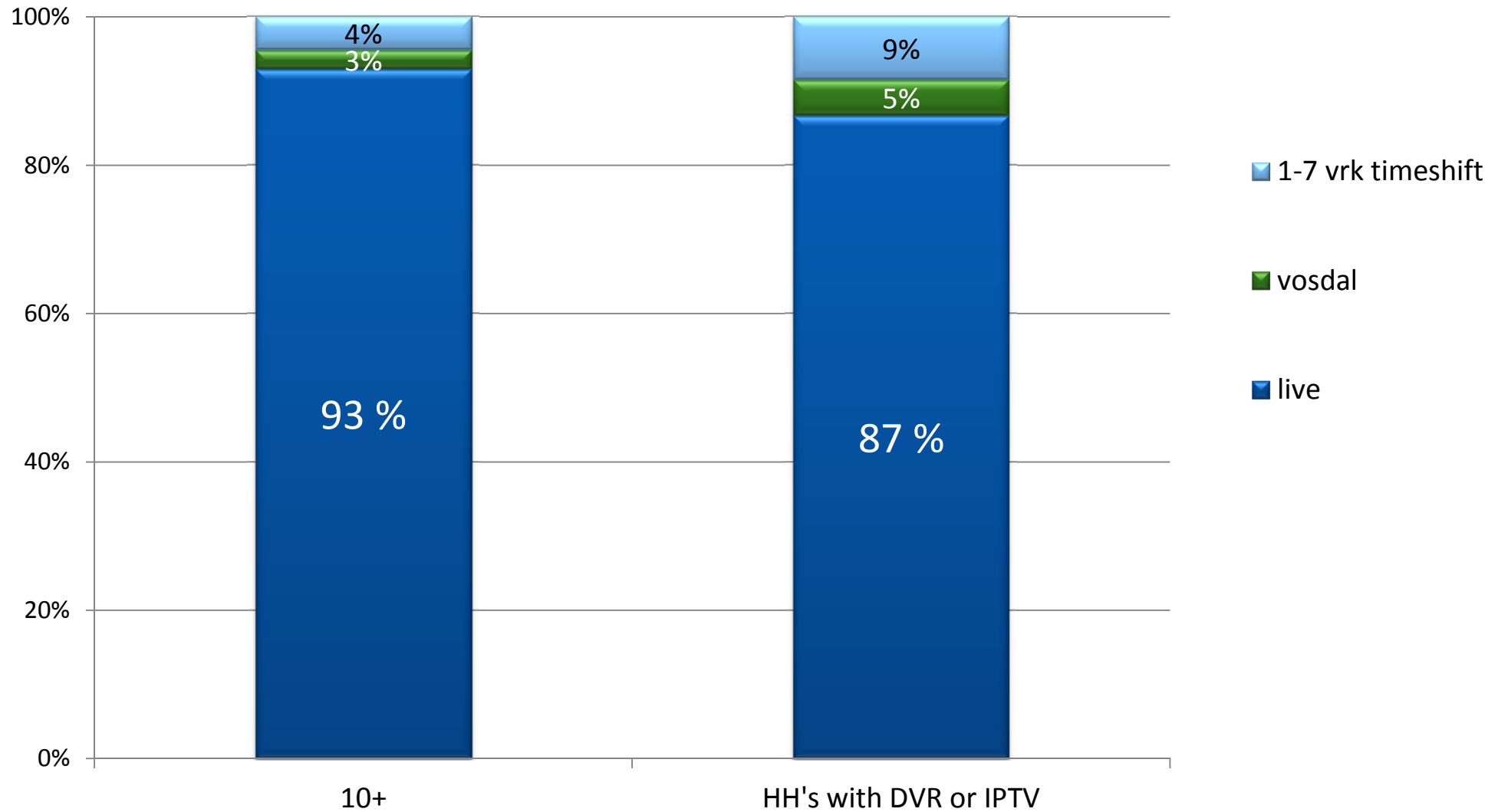
Daily viewing time to commercial channels is increasing



Source Finnpanel Oy, TAM (population: 10+ years) Timeshift and guest viewing included since 2008
Commercial channels = selling air time in Finland



Most TV programmes are watched live even in households with DVR or IPTV



Source: Finnpanel Oy, TAM. Timeshift and guest viewing included. 2013.

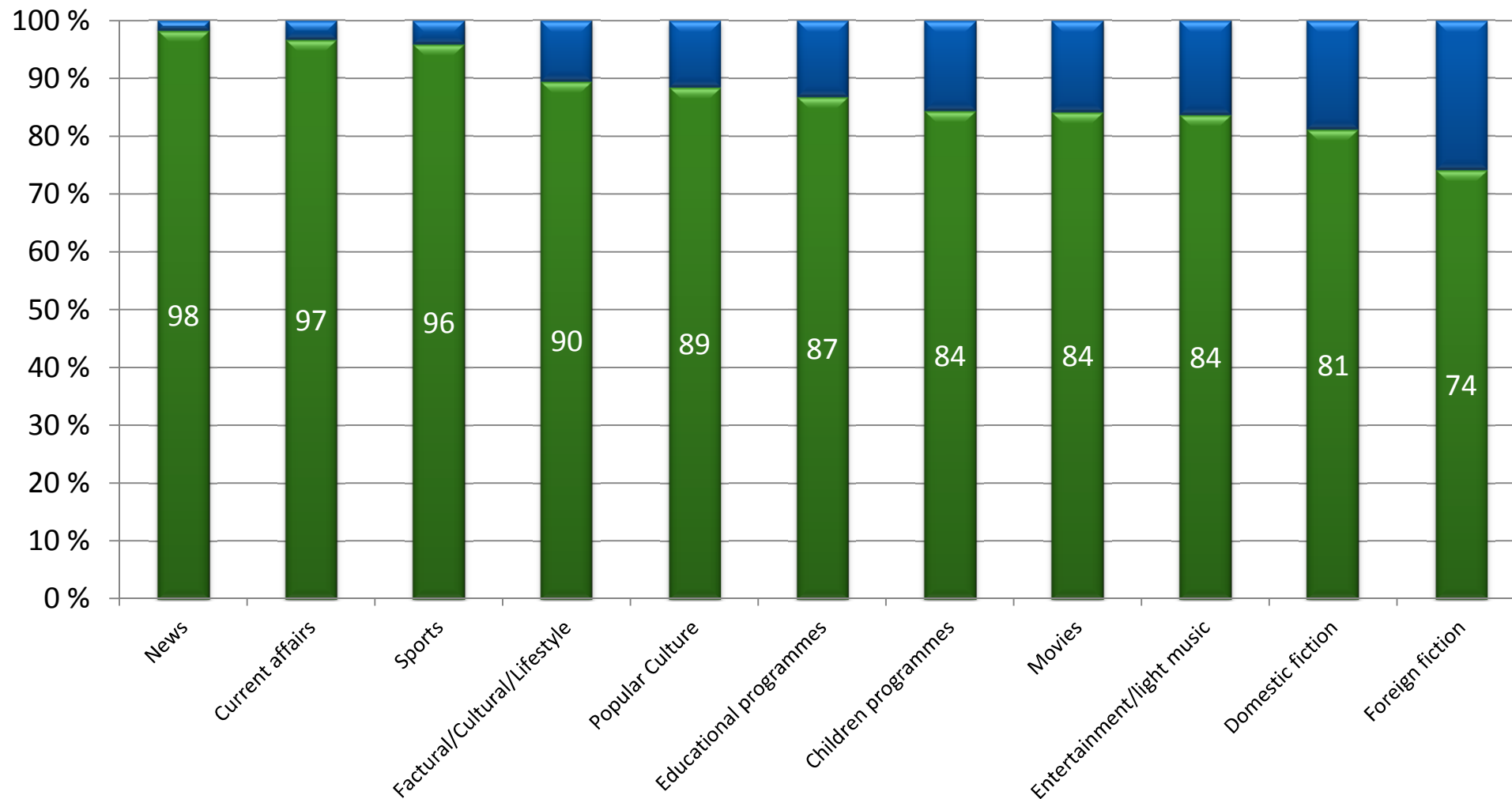


DVR and IPTV HH's: News, Current affairs and Sport programmes are viewed live

Jääkiekon MM-kisat 2%, Itsenäisyyspäivän juhlavastaanotto 3 %

■ timeshift ■ live

Putous and The Voice of Finland approx. 25-27 %



One third of TV households have pay-TV, and in these households viewing to pay-TV channels is 18 %



Viewing to pay-TV channels in pay-TV households:

Children 4-14 yrs: 36 %

Men: 21 %

Top channels:
MTV Juniori
Disney Channel
Nelonen Nappula

Top channels:
MTV MAX
Eurosport
Discovery



Top recurrent programmes 2013

Title	Channel	Average rating	No. of episodes
Putous	MTV3	1 262 000	8
Tanssii Tähtien kanssa	MTV3	1 035 000	10
Pirunpelto	Yle TV2	994 000	6
Tangomarkkinat	Yle TV1	857 000	3
Taivaan tulet	Yle TV2	853 000	11
Vain elämää	Nelonen	816 000	8
Salatut elämät	MTV3	775 000	170
The Voice of Finland	Nelonen	724 000	17
Uutisvuoto	Yle TV1	704 000	34
Yle Uutiset	Yle TV1	690 000	365

Source: Finnpanel Oy, TAM, incl. timeshift and guest viewing.

Recurrent programmes (excl. Reruns, sports events, programmes aired less than 3 times, programmes shorter than 3 minutes).



-
- Some examples of successful crossmedia programmes ...



yle

Docventures toi uutta yleisöä ja piti otteessaan 12 viikkoa

Suomalaisista
67 % kuullut
Docventuresista

Uutta yleisöä Ylelle
ja dokumenteille

Livetapahtumia:
Leffapiknik

Yli **60 000** FB-
tykkääjää

Ohjelmat tavoittivat yht.
1,8 miljoonaa yli 10v
suomalaista (=37 %)

Nettisisällöillä vieraili
keskim. **72 000**
eri selainta / vko

Kaksi Kultaista
Venlaa:
mm. Vuoden
tv-teko

Loi ilmiöitä ja
puheenaiheita:
Lihaton lokakuu,
Liity heti kirkkoon

Docventures
Yle Puheen
ladatuimpia
radiosisältöjä

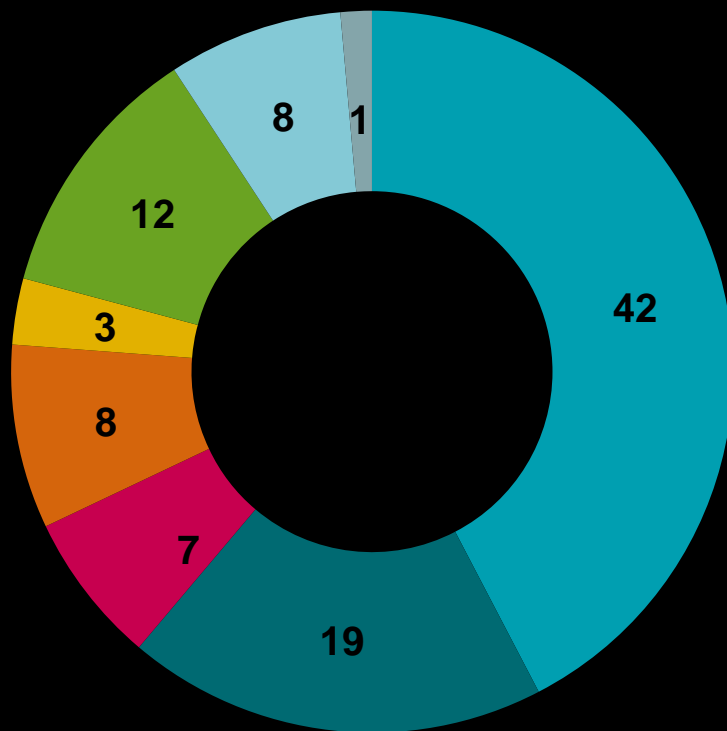
Areenakatselun
osuus jopa **20 %**



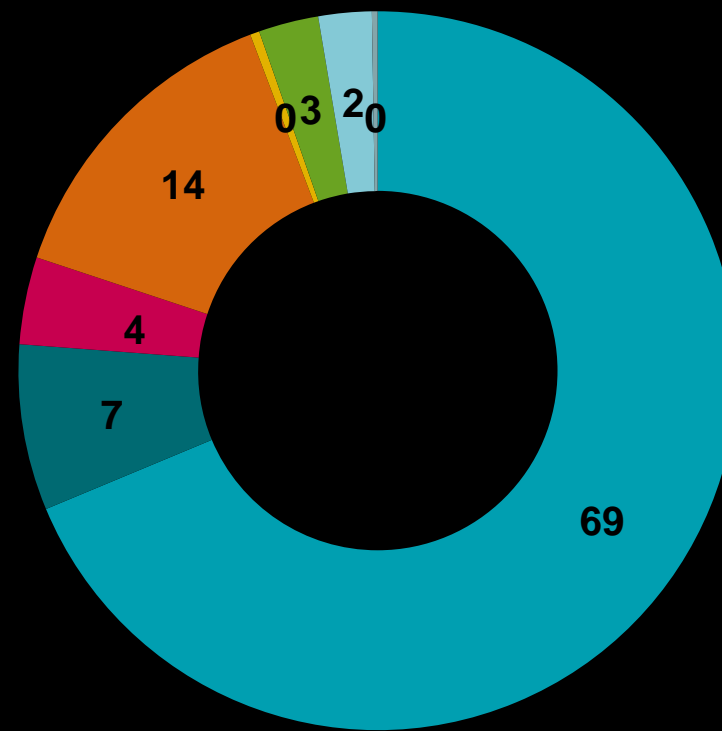
Docventures oli transmediainen

(Mistä seurannut, maininnat %, alle ja yli 45-v)

Alle 45-v. (n=813)

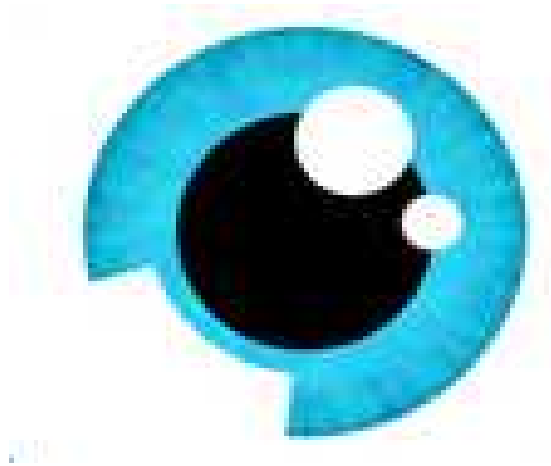


Yli 45-v. (n=312)



■ Televisiosta ■ Yle Areenasta ■ Radiosta (myös nettiradio) ■ Lehdestä ■ Twitteristä ■ Facebookista ■ Muualta internetistä ■ Muualta

Ennätysten ilta 13.9: Julkkis Big Brother alkaa!



620 000 free-
käynnistystä
Katsomossa

Ohjelman
keskikatsojamäärä
817 000

355 000
eri kävijää
sivustolla



22 000 twiittiä

Julkkis Big Brother alkaa!

3.9.2013

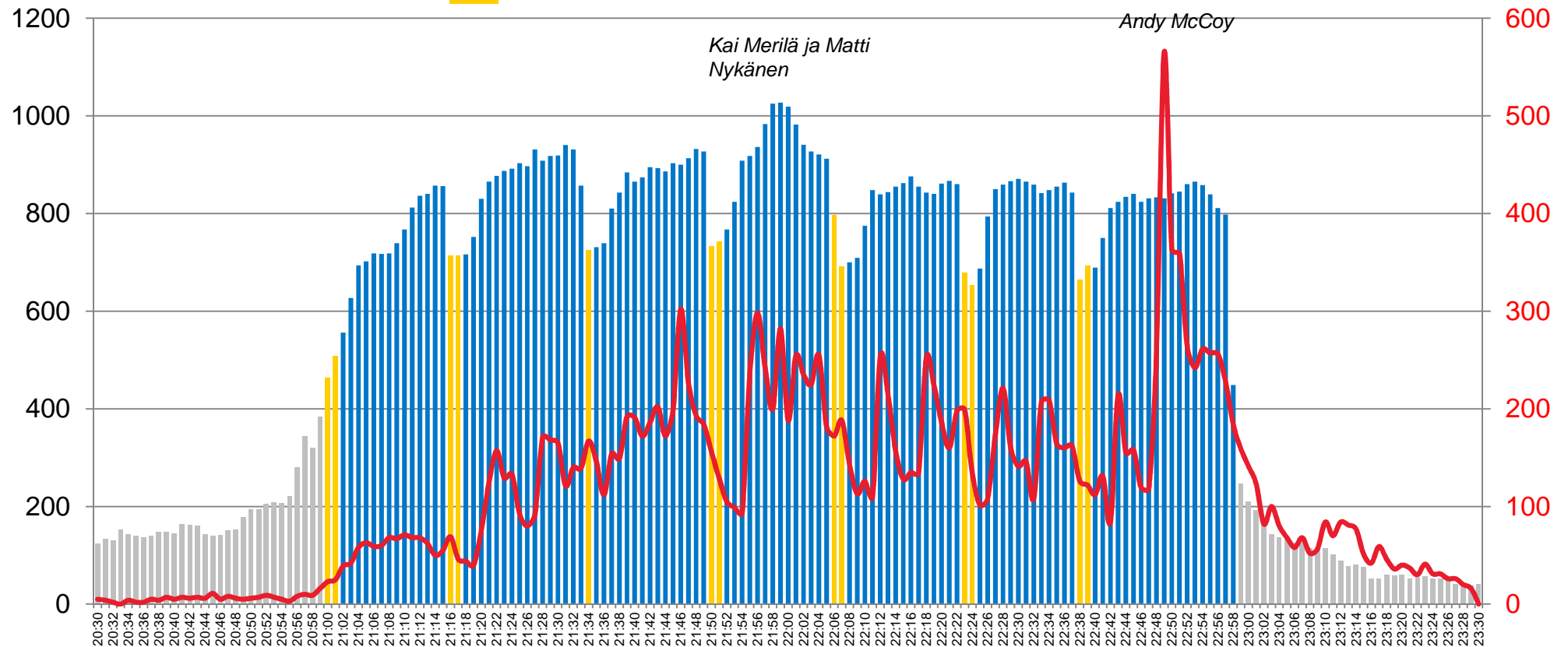
Katsojamäärä
(000) per min

Ohjelman katsojamäärä (000) 4+ v.

Twitter

Twiiit
per min

Mainoskatkot (000)



Lähde: Finnpanel TV-mittaritutkimus 3.9. 4+ v. lopullisin luvuin
ja Twitter #bbsuomi (kaikki twiitit, jotka sisältävät #bbsuomi tagin)

sub.

ARMAN JA VIIMEINEN RISTIRETKI

Päälähetys
Jimillä
155 000

Ohjelma tavoitti
kaiken kaikkiaan
1 504 000

Joulumaraton
Jimillä
(tavoittavuus)
360 000

Kultainen Venla -gaalan
palkinnot: paras realityohjelma
ja
yleisöäänestyksen paras
esiintyjä

FB-fanit
81 600



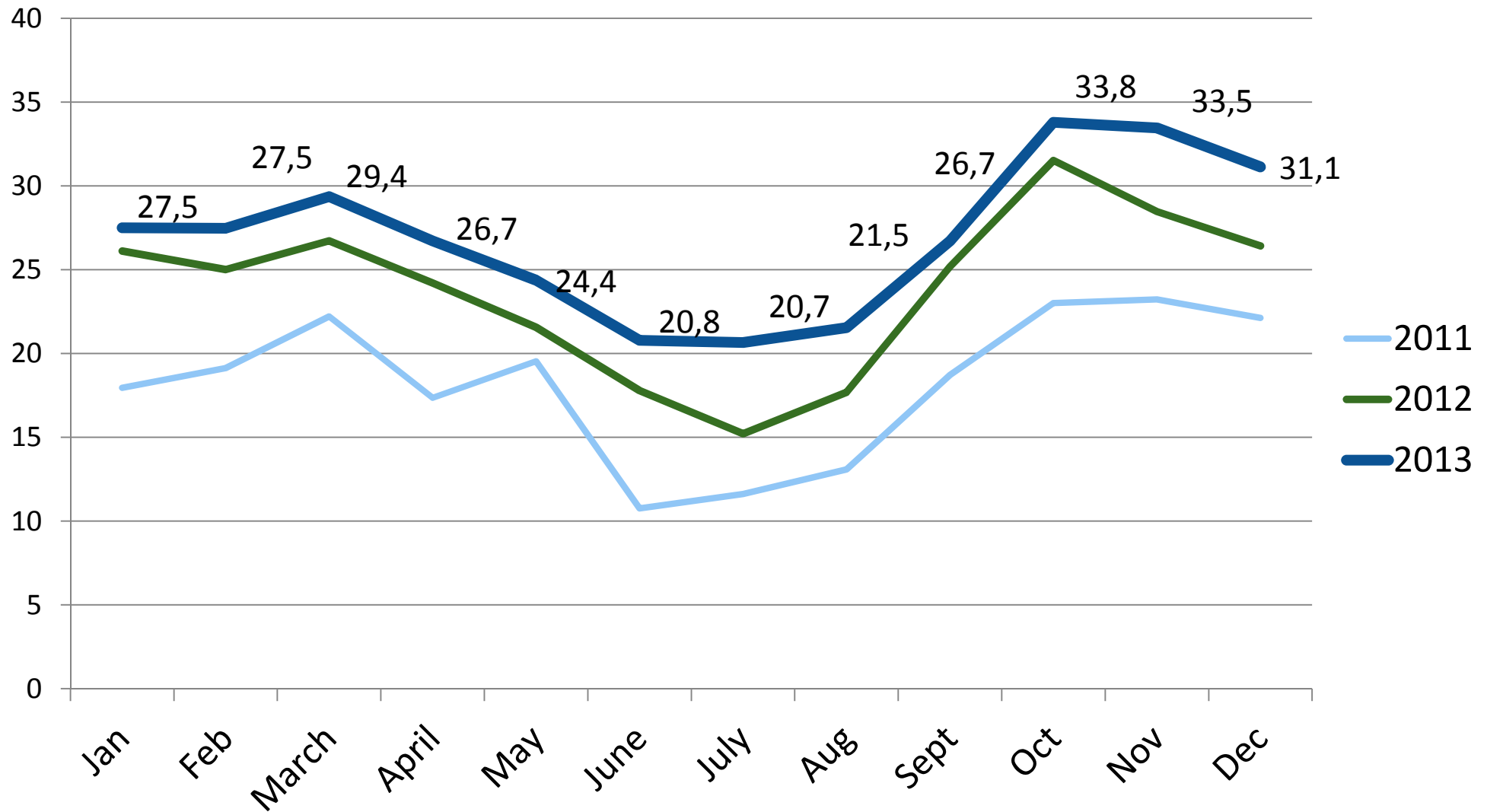
Yli 45 000
twiittiä



Jaksojen ja klippien
käynnistyksiä Ruudussa
yhteensä 682 000

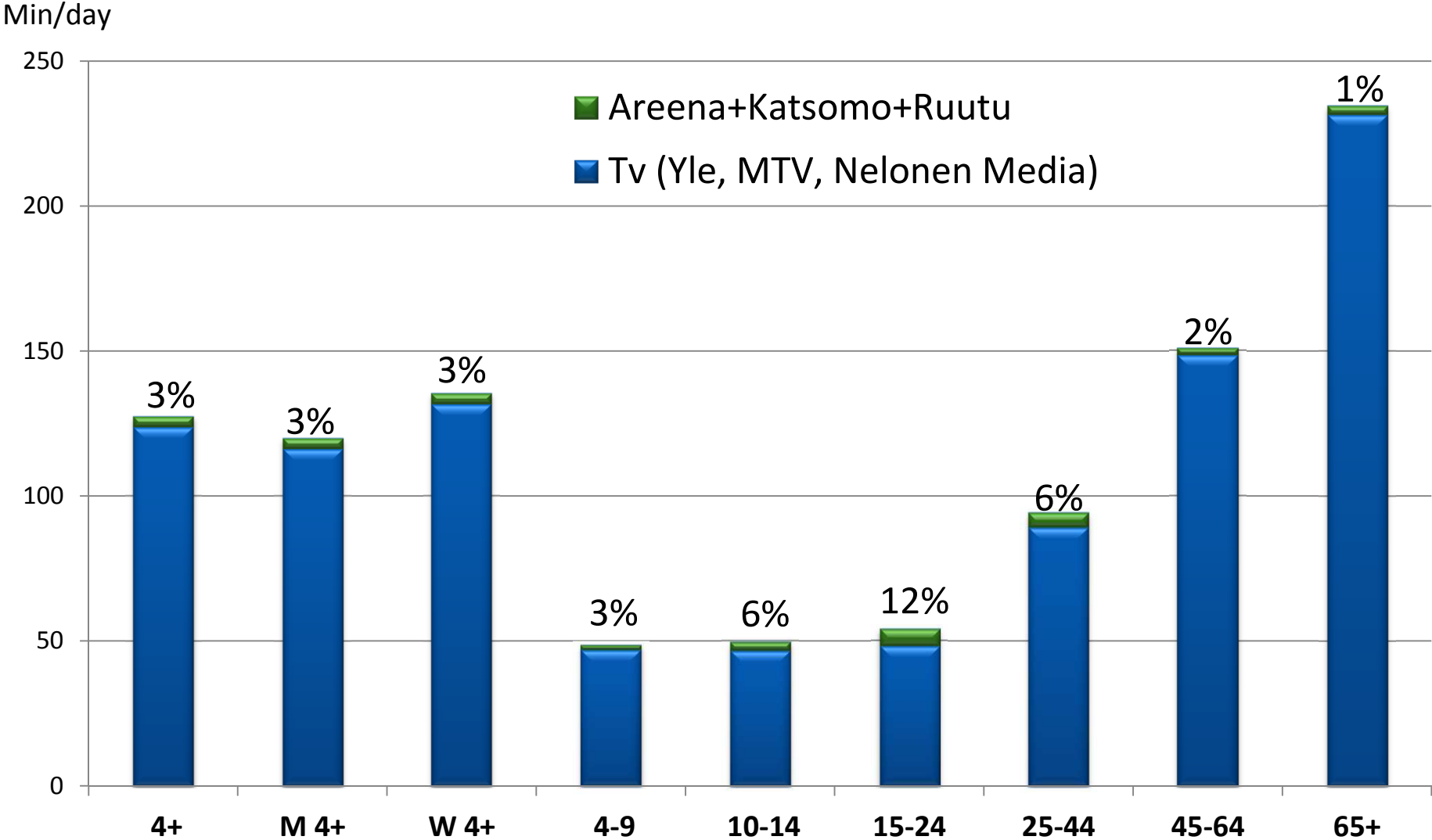
Web-TV services Areena, Katsomo and Ruutu: on average 27 million monthly starts

Million starts



Source: YLE, MTV Oy and Nelonen Media (free to air content from TV1, TV2, Teema, Fem, MTV3, Sub, AVA, Nelonen, JIM and Liv)

October 2013: majority of MTV, Nelonen Media, and Yle video content is watched via TV set.



Source: Finnpanel , TAM Panel Survey week 44/2013.

Finnish TV landscape in 2003 and 2013

	2003	2013
TV sets	3 544 000	4 400 000
Free-tv channels	4	13
DVR's and recording TV sets	-	34 %
IPTV	-	9 %
Pay-TV subscribers	101 000	746 000
Broadband	16 %	84 %
Population viewing TV via PC	3 %	44 %
Daily viewing time (hrs:min)	2:53	3:02

Source: Finnpanel, Establishment Survey and TAM.

Top programmes in 2013

Title	Channel	Day	Date	Tim	Rating	Rating %
Yle Uutiset	TV1	Fri	6.12.	20:30	1 980 000	41 %
Itsenäisyyspäivän juhlavastaanotto	TV1	Fri	6.12.	18:34	1 947 000	41 %
Yle Uutiset	TV1	Fri	6.12.	18:30	1 871 000	39 %
Yleisurheilun MM	TV2	Sat	17.8.	16:47	1 508 000	32 %
Putous	MTV3	Sat	23.2.	19:29	1 432 000	30 %
Jääkiekon MM-kisat: Venäjä - Suomi	MTV3	Fri	10.5.	21:53	1 379 000	29 %
Itsenäisyyspäivän jatkot	TV1	Fri	6.12.	21:31	1 347 000	28 %
Jääkiekon MM-kisat: Latvia - Suomi	MTV3	Tue	14.5.	21:00	1 331 000	28 %
Jääkiekon MM-kisat: Pronssiottelu	MTV3	Sun	19.5.	18:26	1 249 000	26 %
Kymmenen Uutiset	MTV3	Tue	14.5.	21:44	1 242 000	26 %

Source: Finnpanel Oy, TAM, Population 10+y .
Best performance / programme title

2013 – a good year for TV

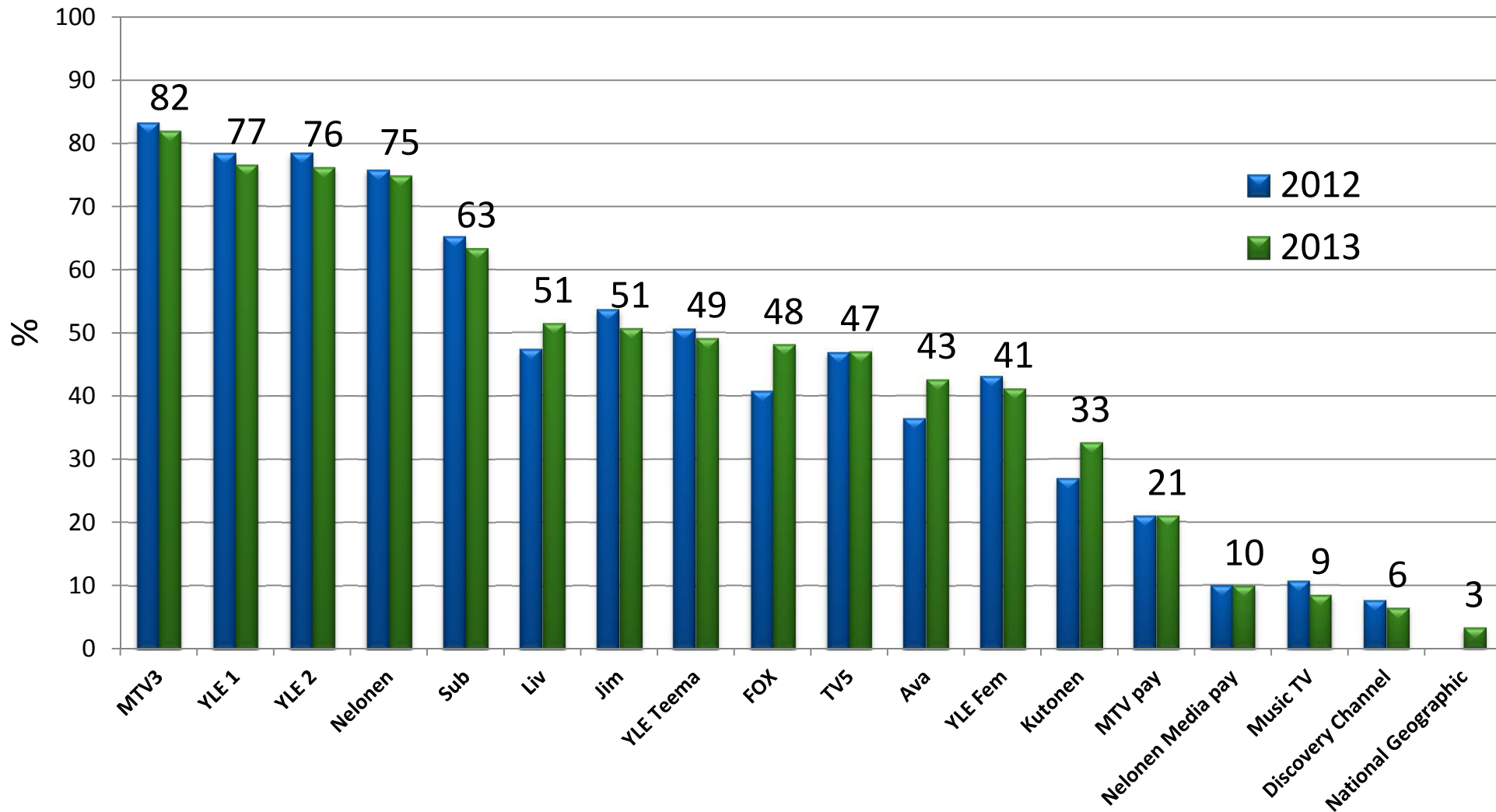
- Average daily viewing time 3 hrs – weekly 21 hrs
- Finnish households have more TV sets than ever
- Web-tv starts increased by 15 %
- The most popular TV contents attract millions of viewers
 - but behind top ratings there are thousands of different viewing habits



More information on viewing



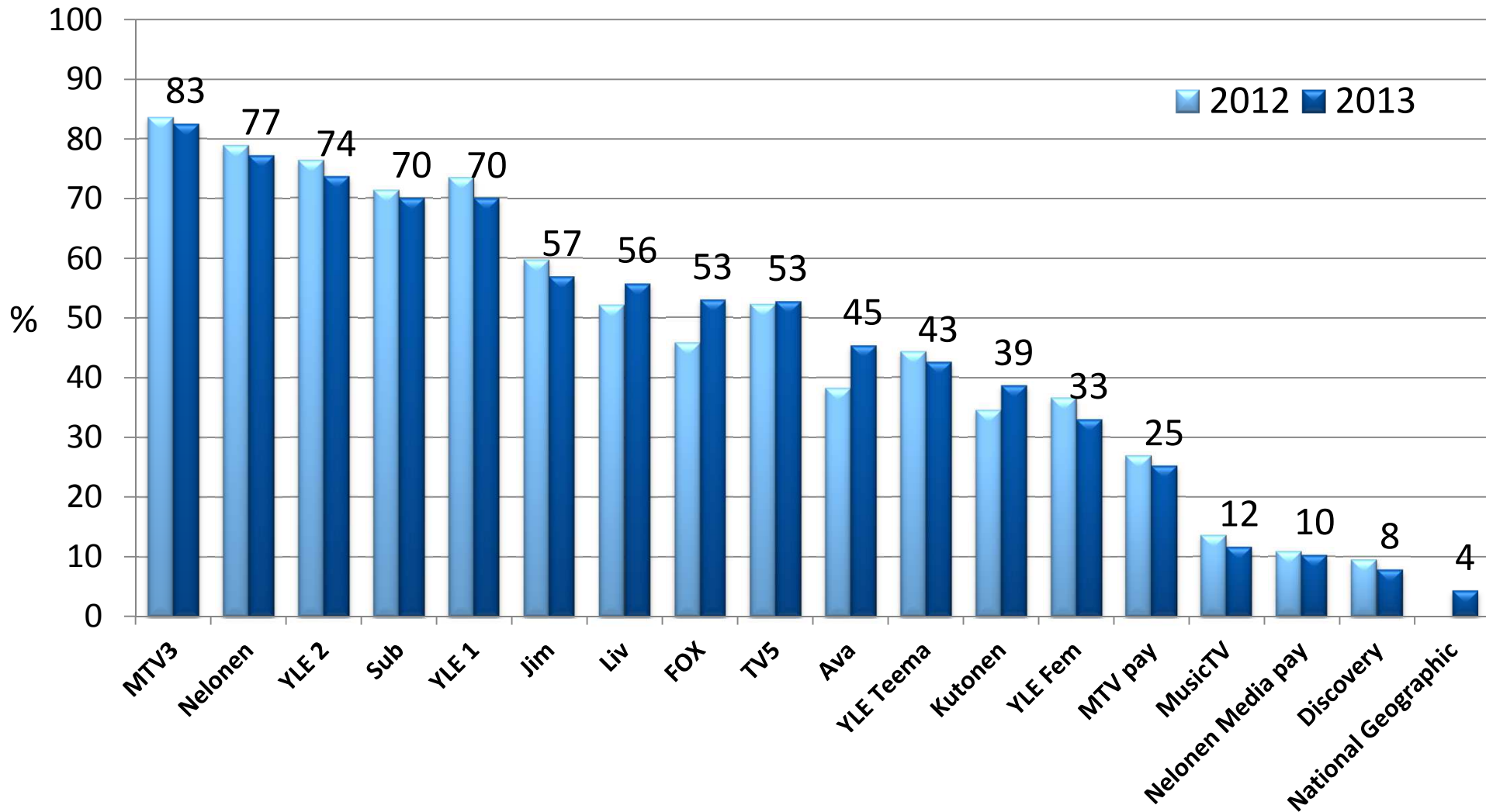
Average weekly reach (%) by channel 2013



Source: Finnpanel Oy, TAM, 10+ yrs. incl. timeshift viewing.
Reach criteria 1 minute.
AVA expanded to terrestrial 1.2.-12
FOX launched 16.4.-12 at SuomiTV's channel frequency.



Average weekly reach(%) by channel, 25-44



Source: Finnpanel Oy, TAM, 10+ yrs. incl. timeshift viewing.

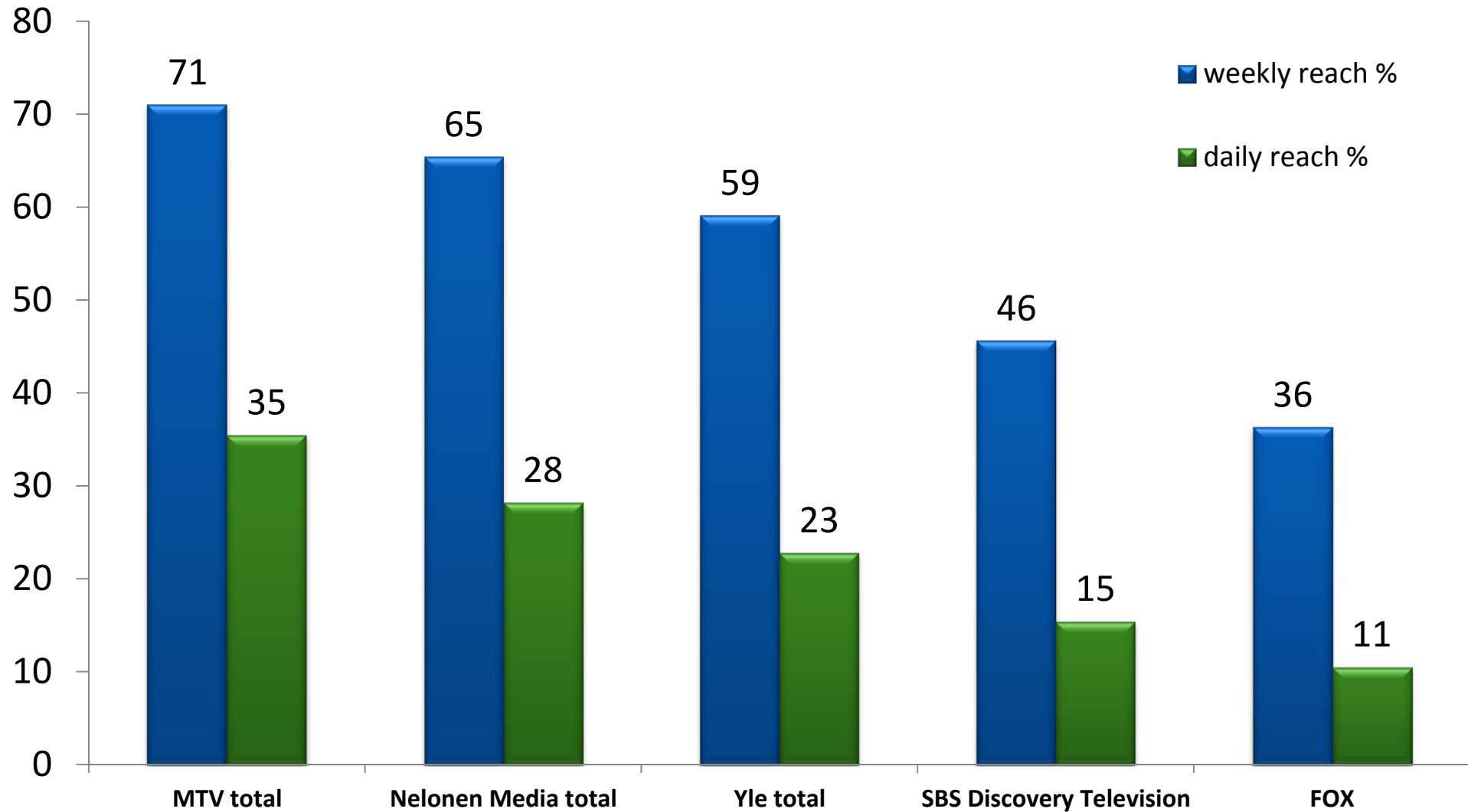
Reach criteria 1 minute.

AVA expanded to terrestrial 1.2. -12

FOX launched 16.4.-12 at SuomiTV's channel frequency.



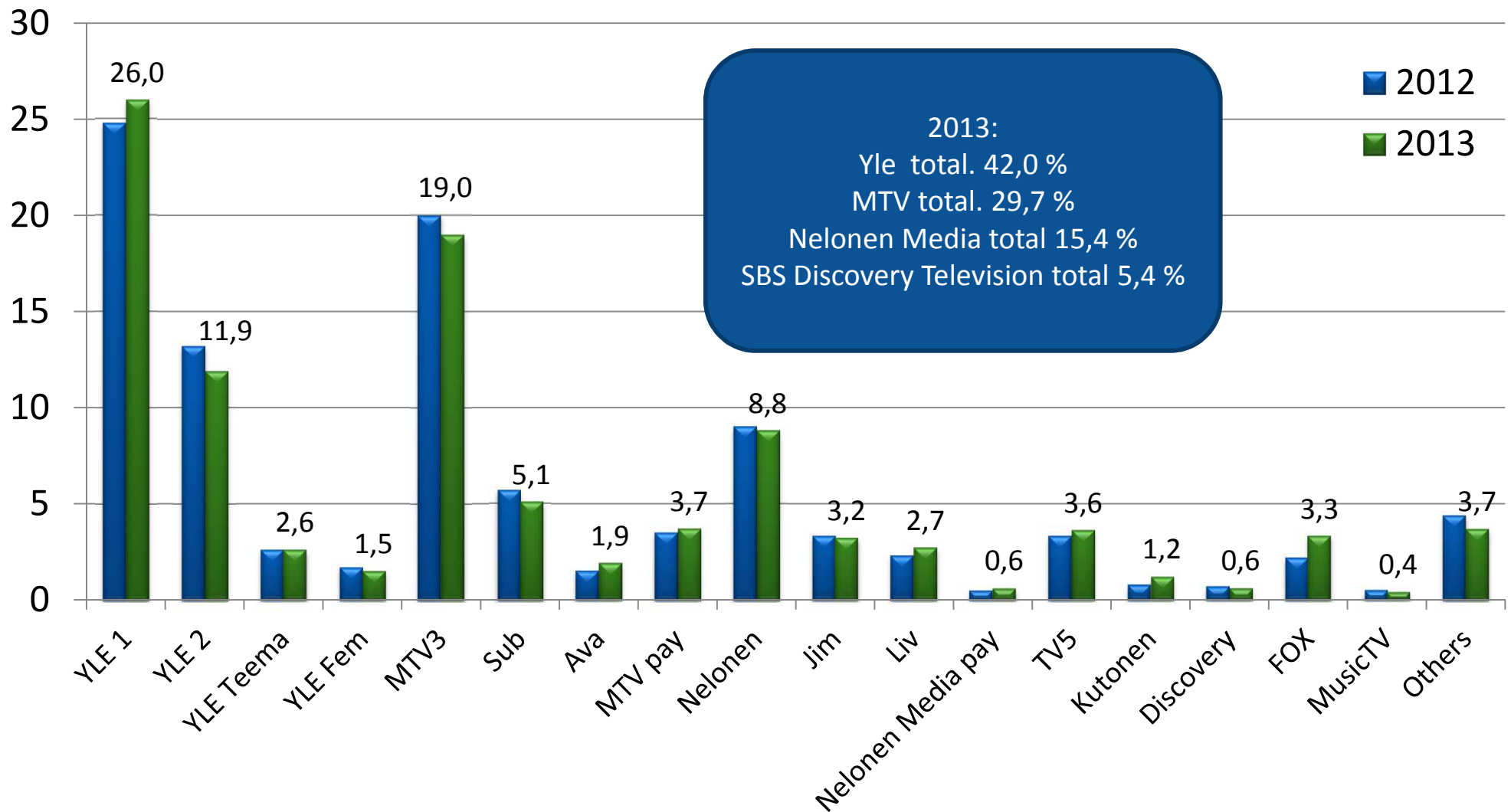
TV weekly reach for 15-24 yrs: 79 %



Source: Finnpanel Oy, TAM, incl. timeshift viewing, 2013.
Reach criteria 1 minute.

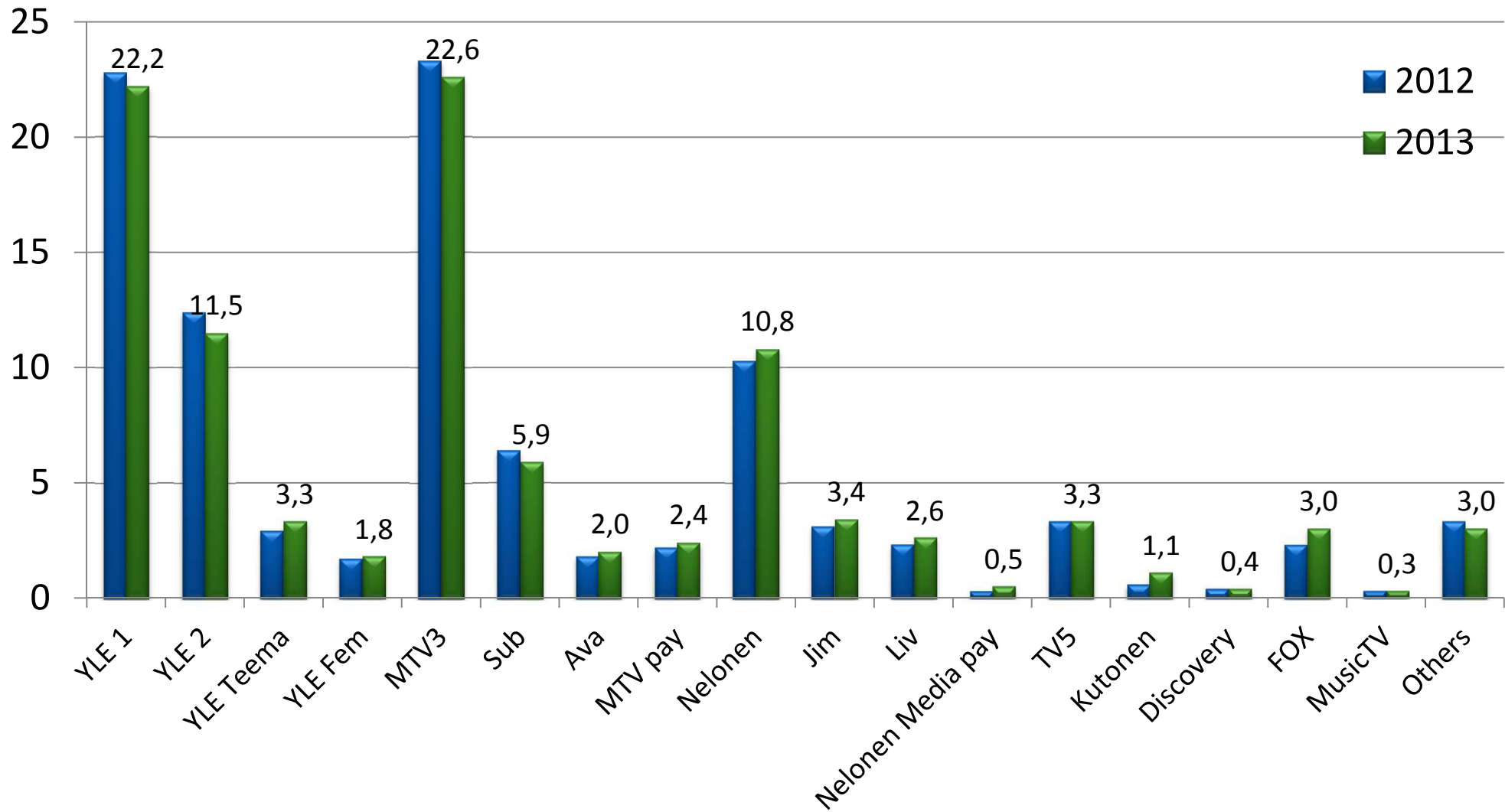


Channel share (%) for average day



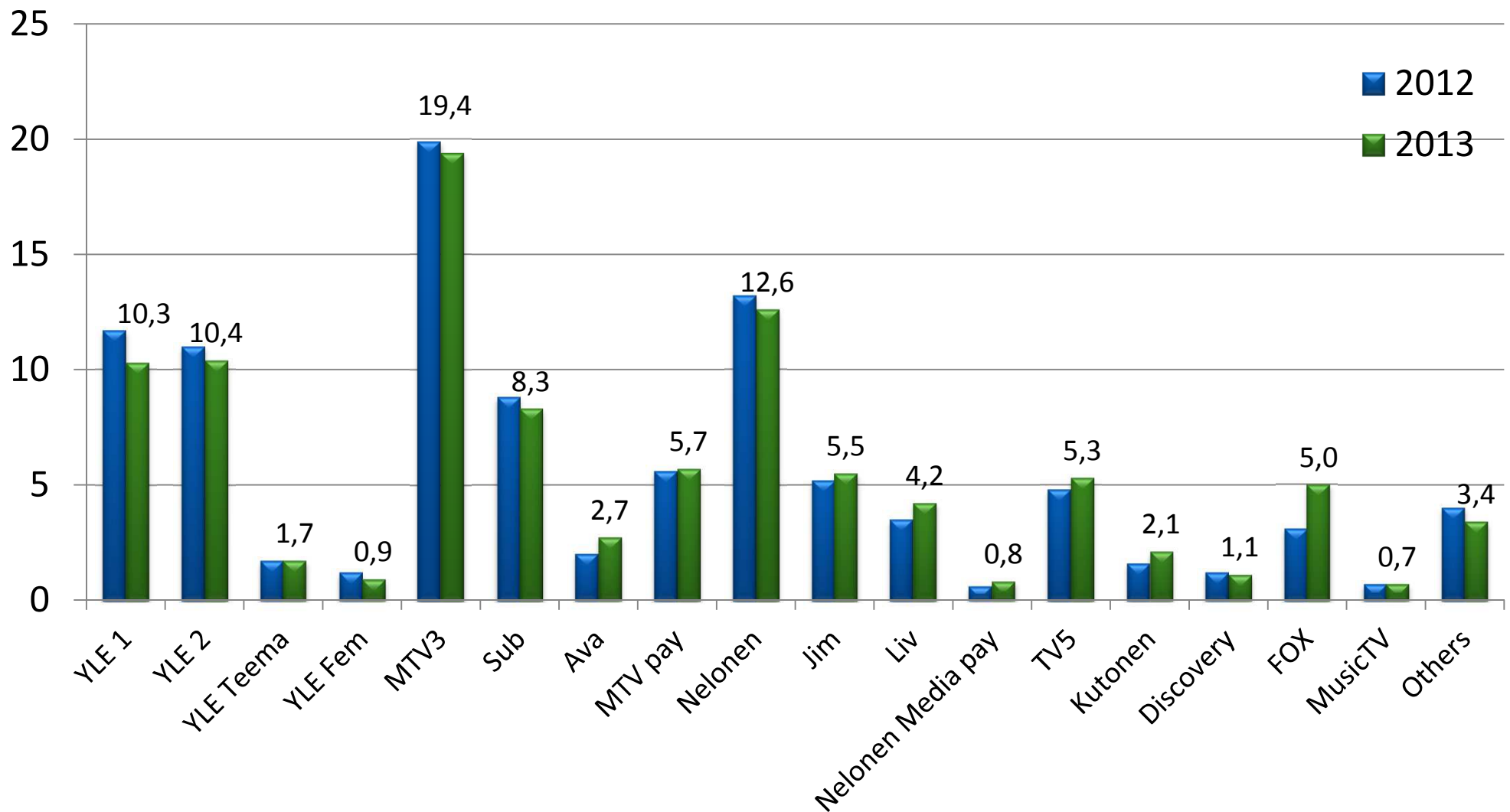
Source: Finnpanel Oy, TAM, 10+ y incl. timeshift viewing.
 AVA expanded to terrestrial 1.2. -12
 FOX launched 16.4.-12 at SuomiTV's channel frequency.

Channel share (%) for prime time (18-23)



Source: Finnpanel Oy, TAM, 10+ y incl. timeshift viewing.
 AVA expanded to terrestrial 1.2. -12
 FOX launched 16.4.-12 at SuomiTV's channel frequency.

Channel share (%) on average day, 25-44

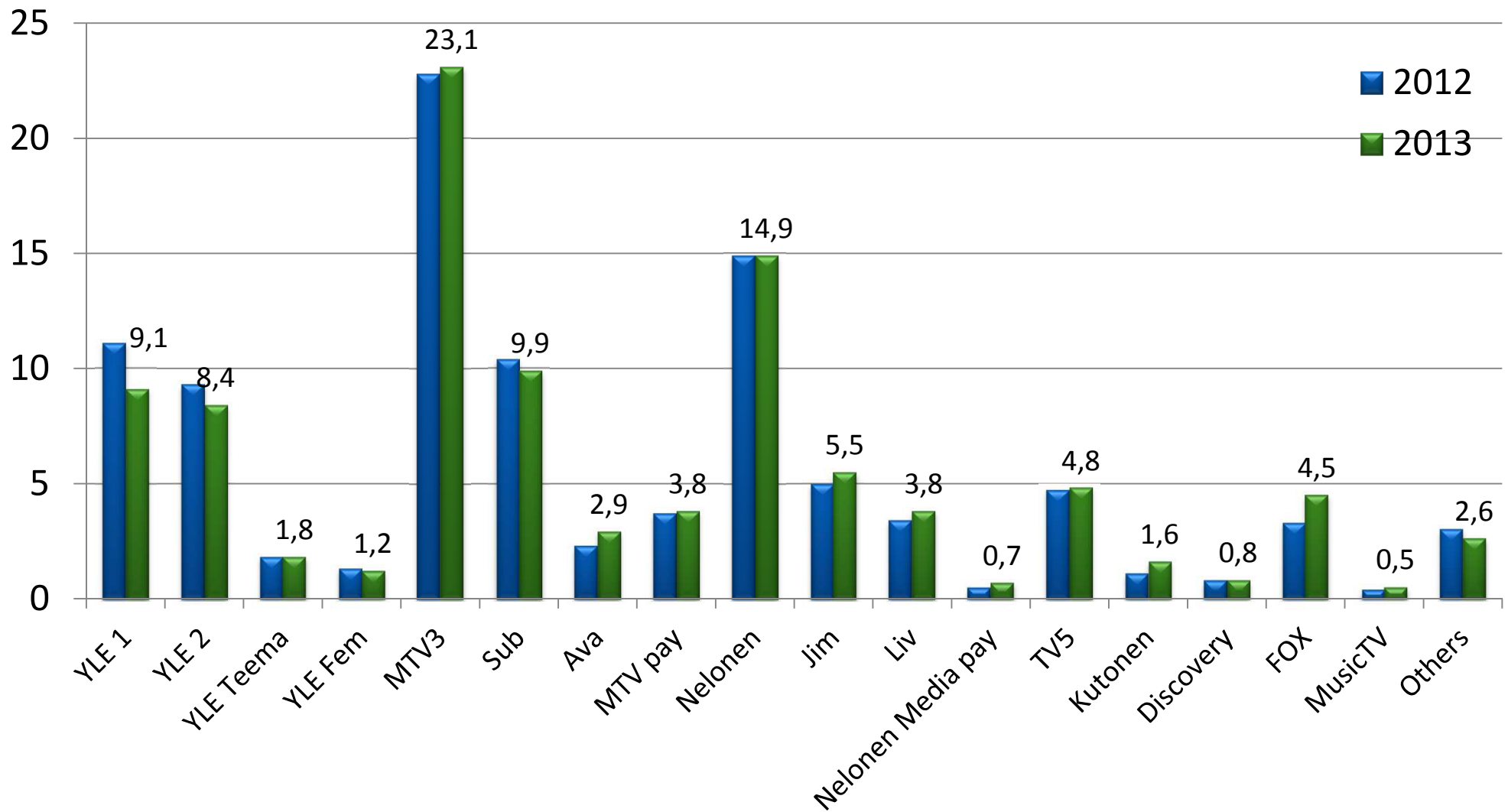


Source: Finnpanel Oy, TAM, incl. timeshift viewing and guests.

AVA expanded to terrestrial 1.2. -12

FOX launched 16.4.-12 at SuomiTV's channel frequency.

Channel share (%) for 25-44, prime time (18-23)



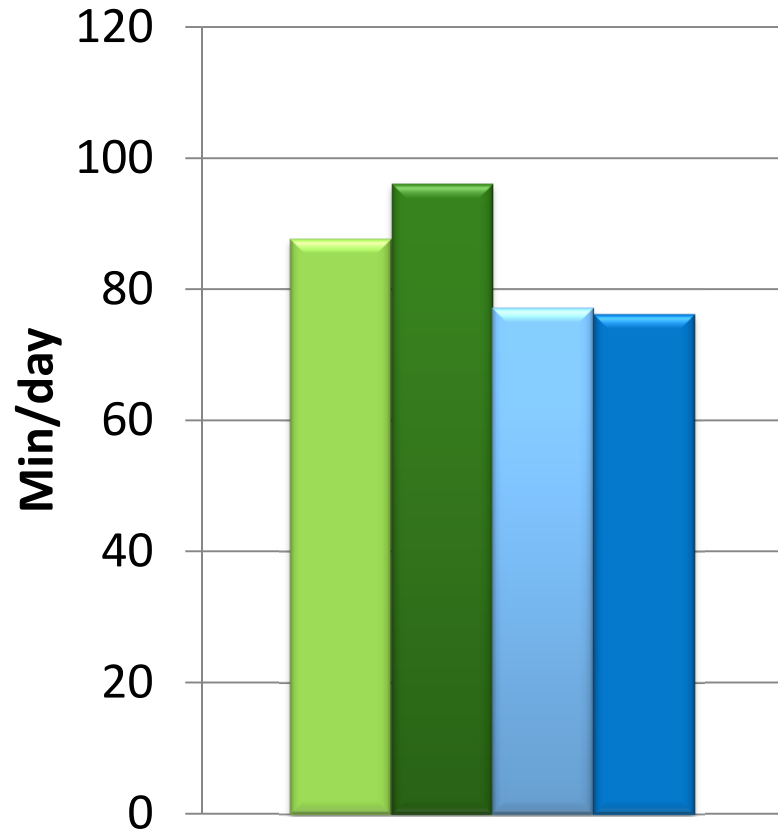
Source: Finnpanel Oy, TAM, incl. timeshift viewing and guests.

AVA expanded to terrestrial 1.2. -12

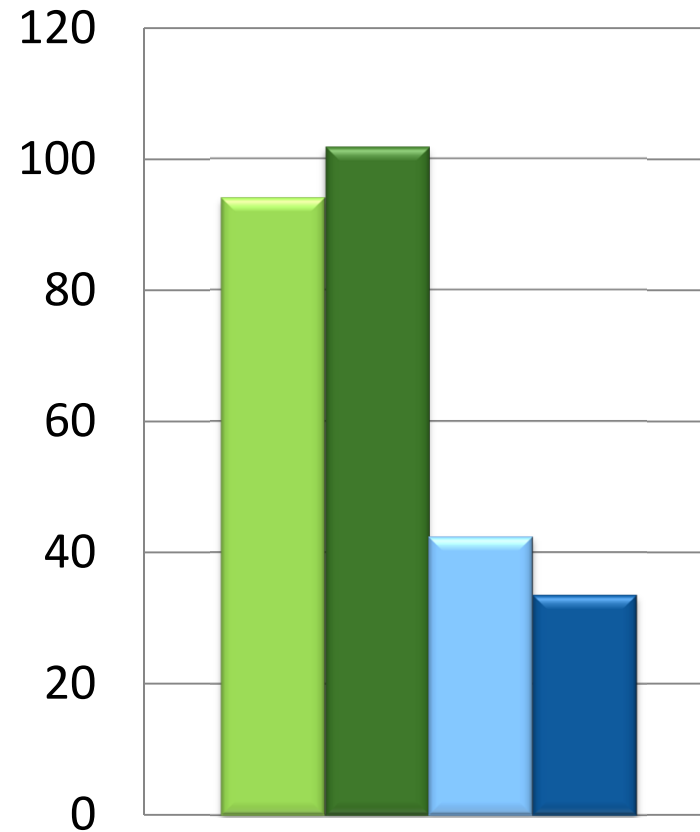
FOX launched 16.4.-12 at SuomiTV's channel frequency.

Commercial viewing time is increasing

10+



25-44

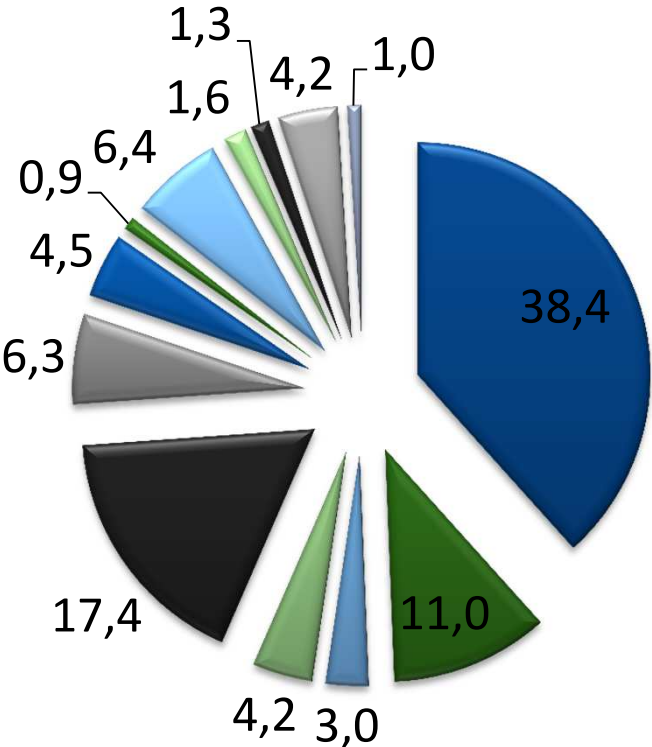


- Commercial channels 2009
- Commercial channels 2013
- Yle total 2009
- Yle total 2013

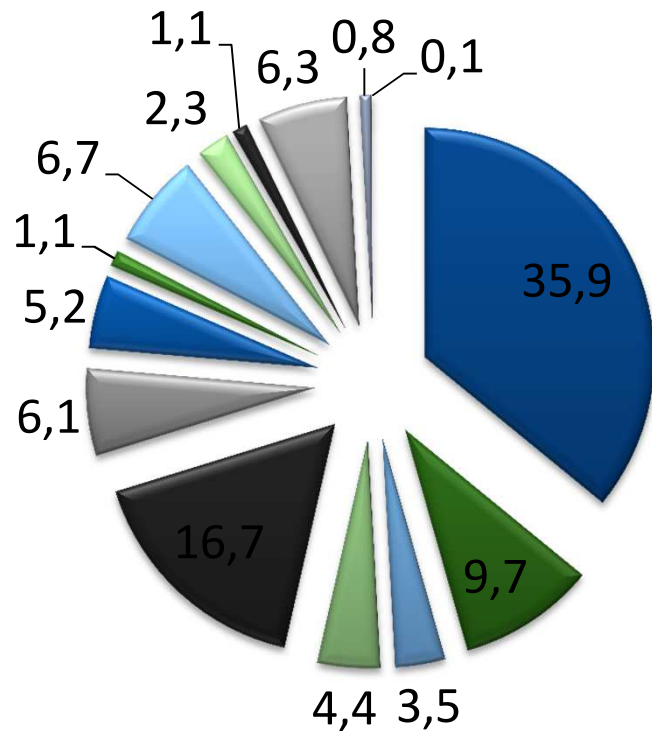
Source: Finnpanel, TAM, incl. timeshift and guest viewing.
Commercial channels = selling air time in Finland.

Commercial channel share (%) 10+

2012



2013



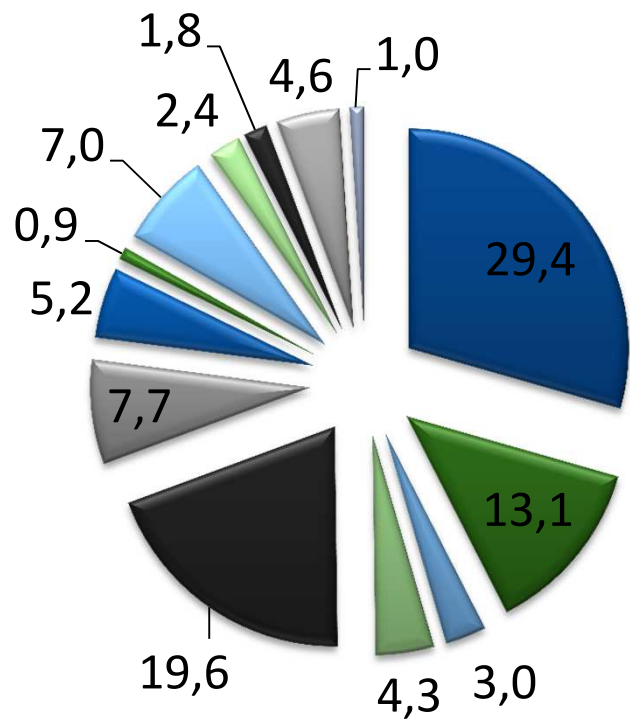
- MTV3
- Sub
- Ava
- MTV pay
- Nelonen
- Jim
- Liv
- Nelonen Media pay
- TV5
- Kutonen
- Discovery
- FOX
- MusicTV
- National Geographic

Source: Finnpanel Oy, TAM,incl. guests and timeshift viewing.
 Commercial channels = selling air time in Finland.
 National Geographic since 30.9.-13.

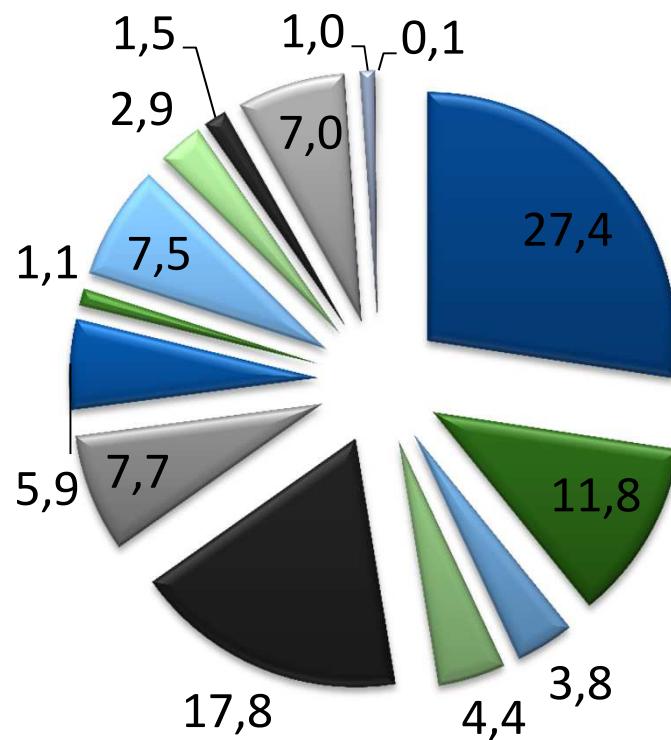


Commercial channel share (%) 25-44

2012



2013

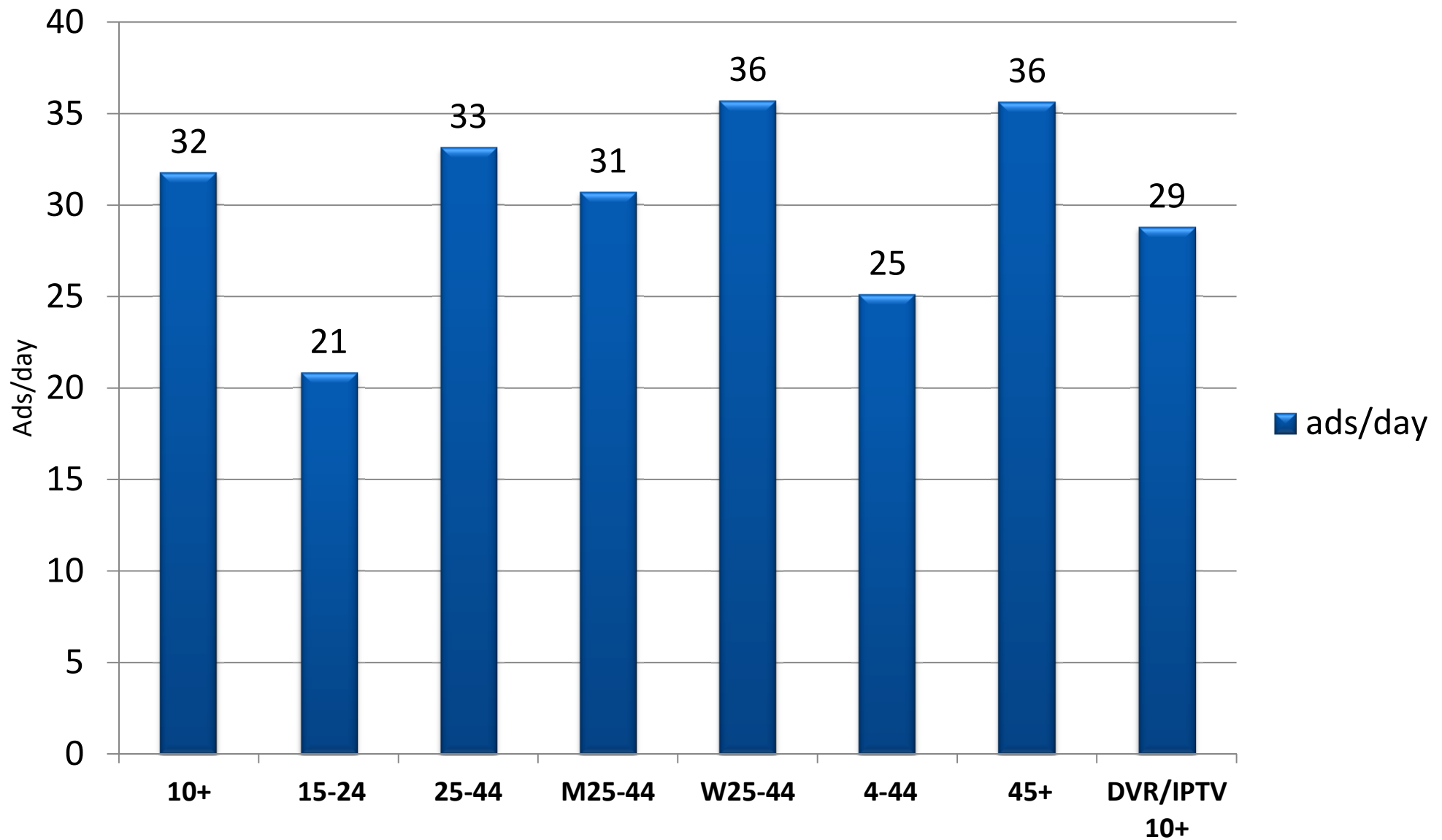


- MTV3
- Sub
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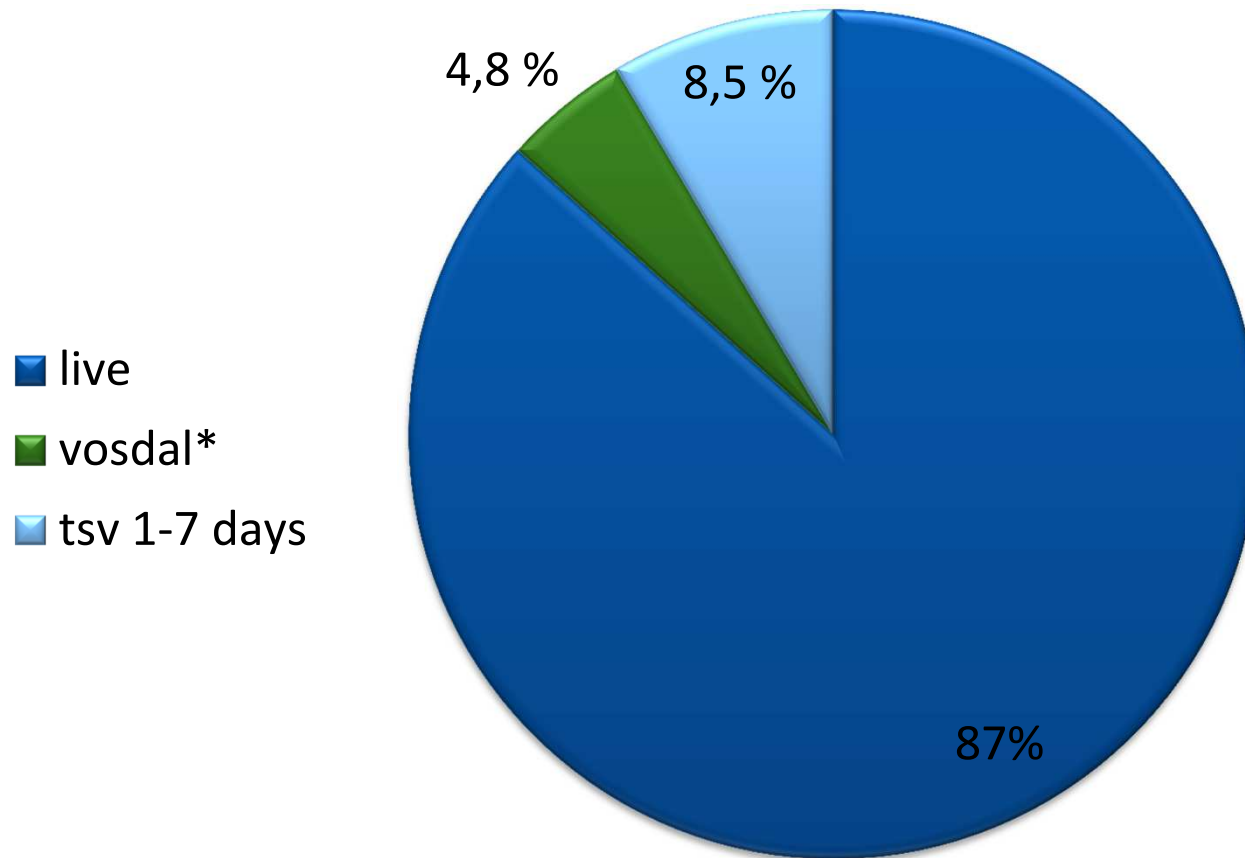
Finns watch 32 ads per day in average



Source: Finnpanel Oy, TAM 2013.
Commercial national spots in Finland.
DVR (Digital Video Recorder), IPTV (IPTV-reception)



13 % of total viewing is time shifted in DVR- or IPTV-hh's

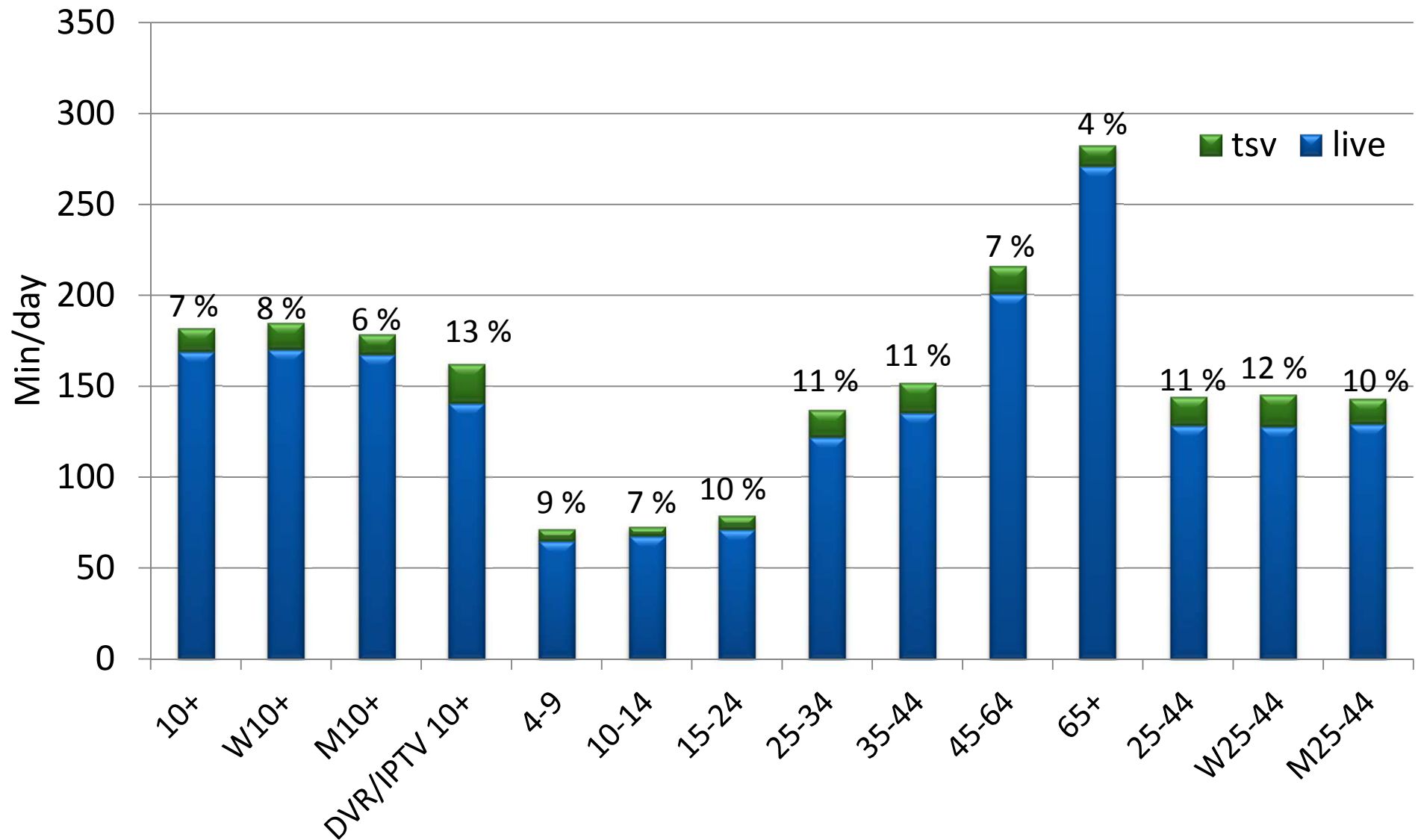


Source: Finnpanel Oy, TAM, 10+ y incl. timeshift viewing, 2013. IPTV- and DVR-households.

*Vosdal=viewed on same day as live



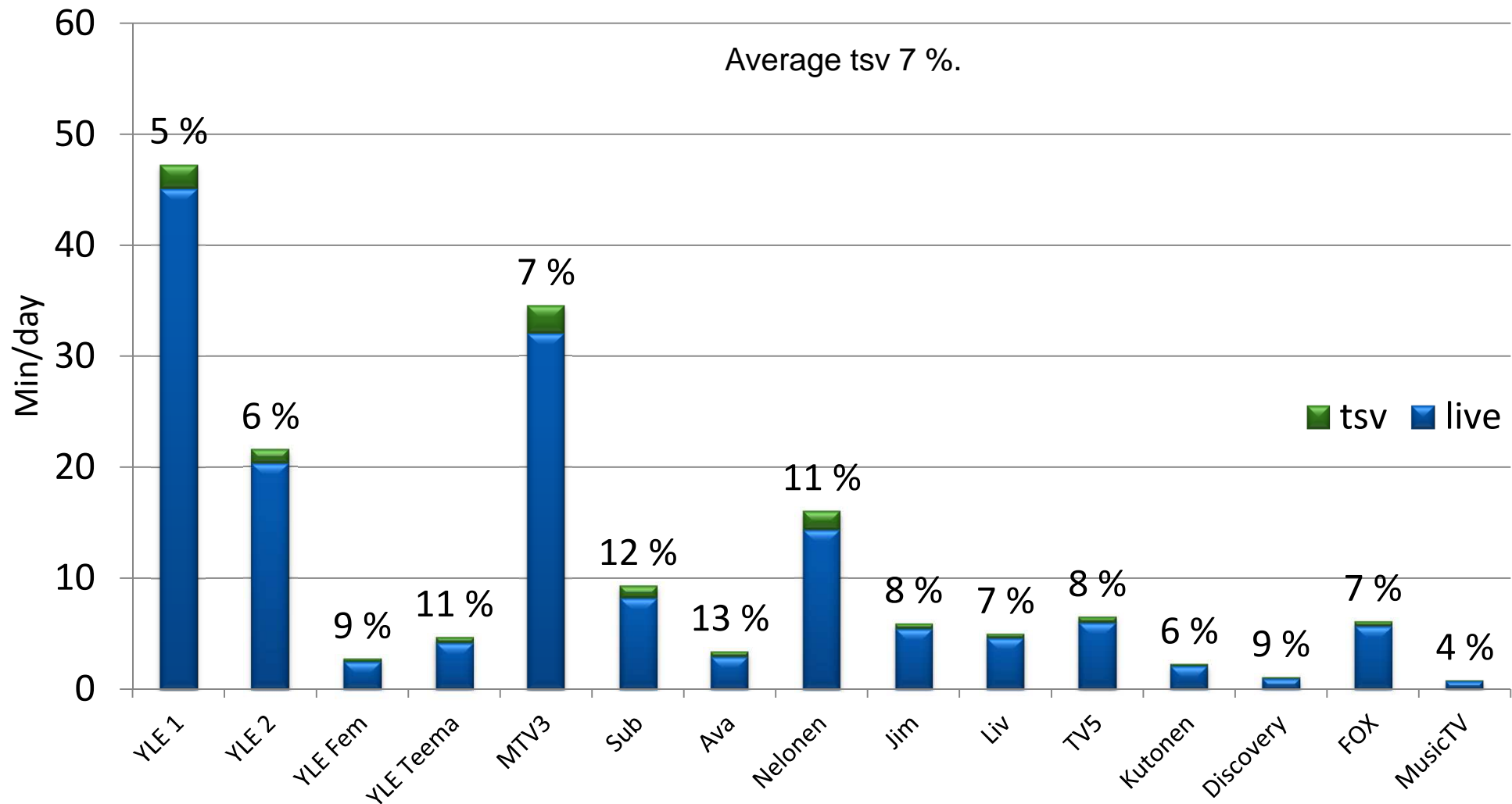
Share of time shifted viewing (%) 2013



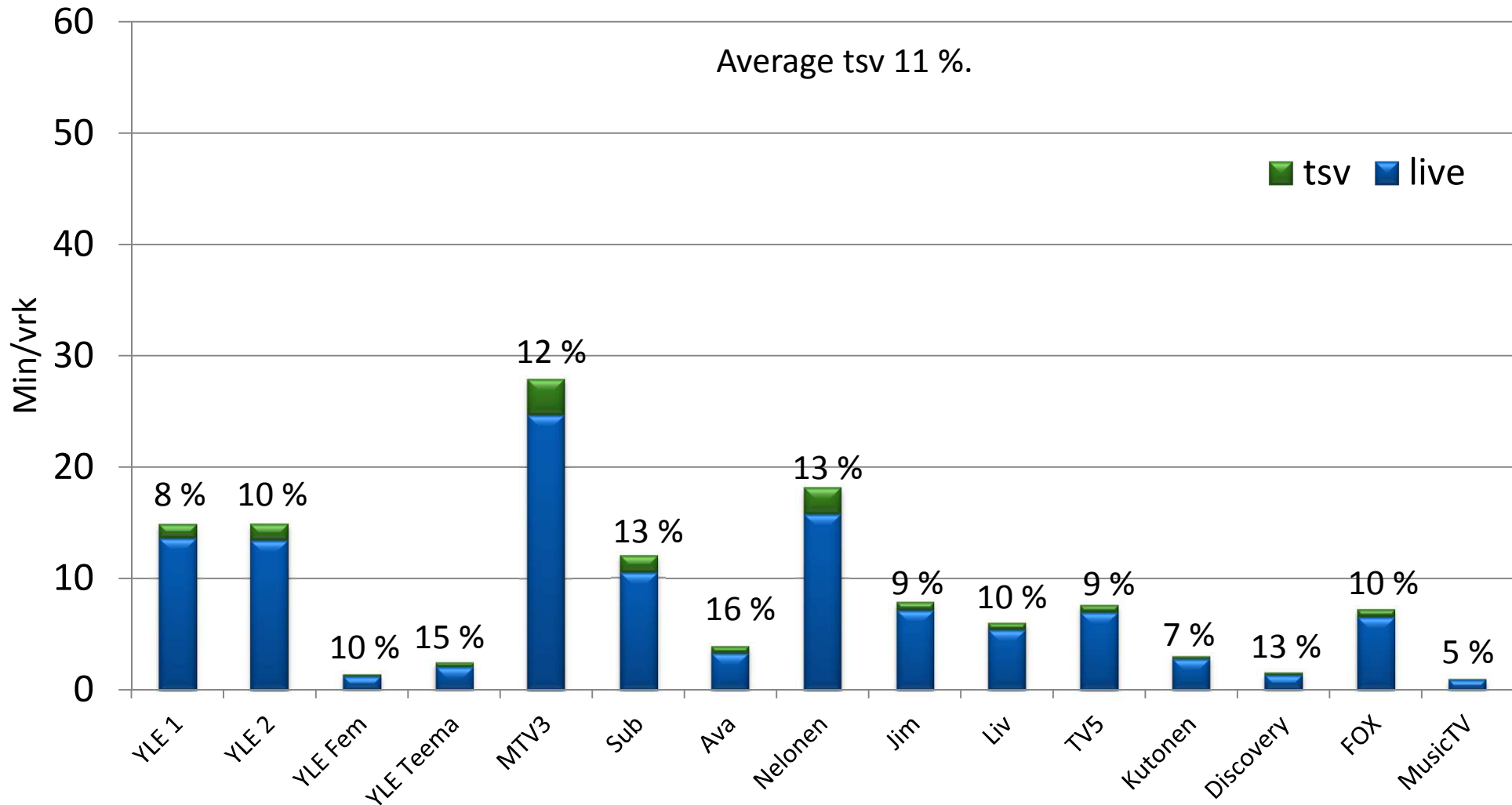
Source: Finnpanel Oy, TAM, incl. guests.



Share of time shifted viewing (%) 2013, by channel

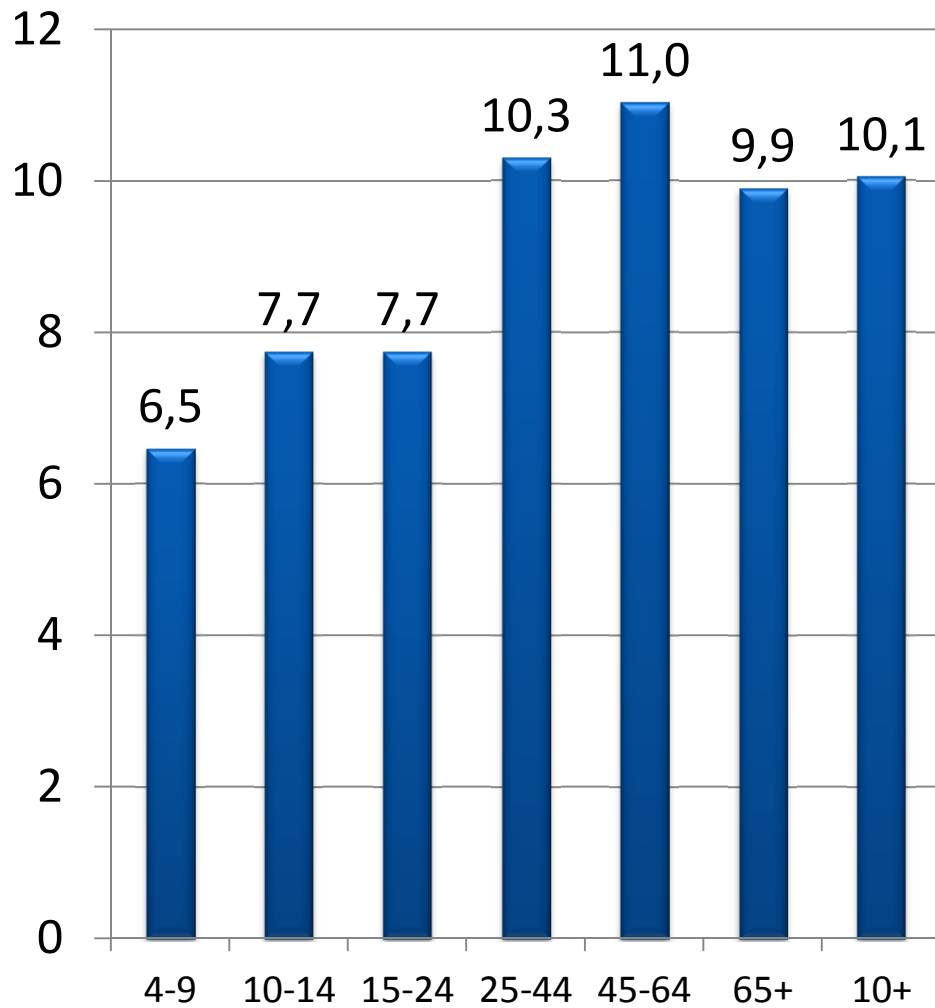


Share of time shifted viewing (%) 2013, 25-44

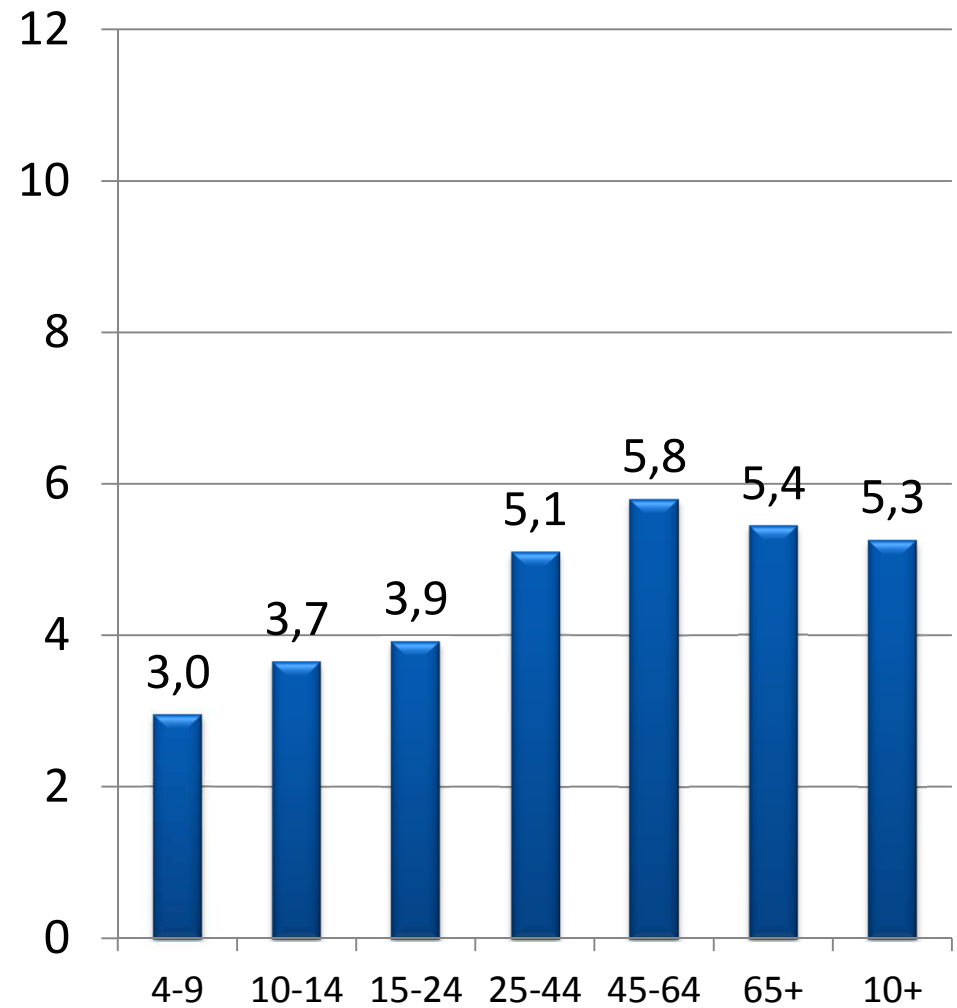


Number of channels viewed 2013

Weekly



Daily

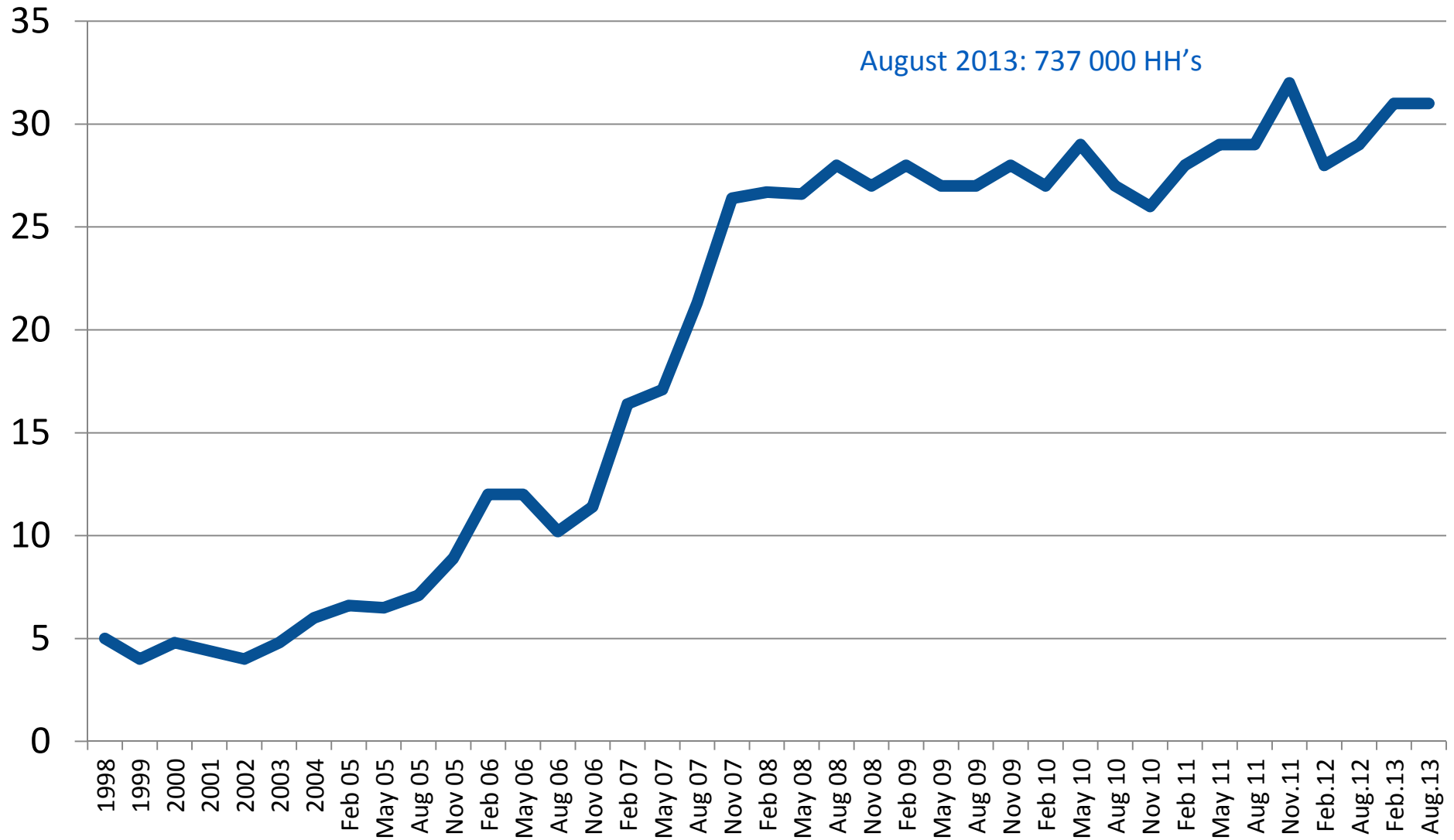


Source: Finnpanel Oy, TAM.



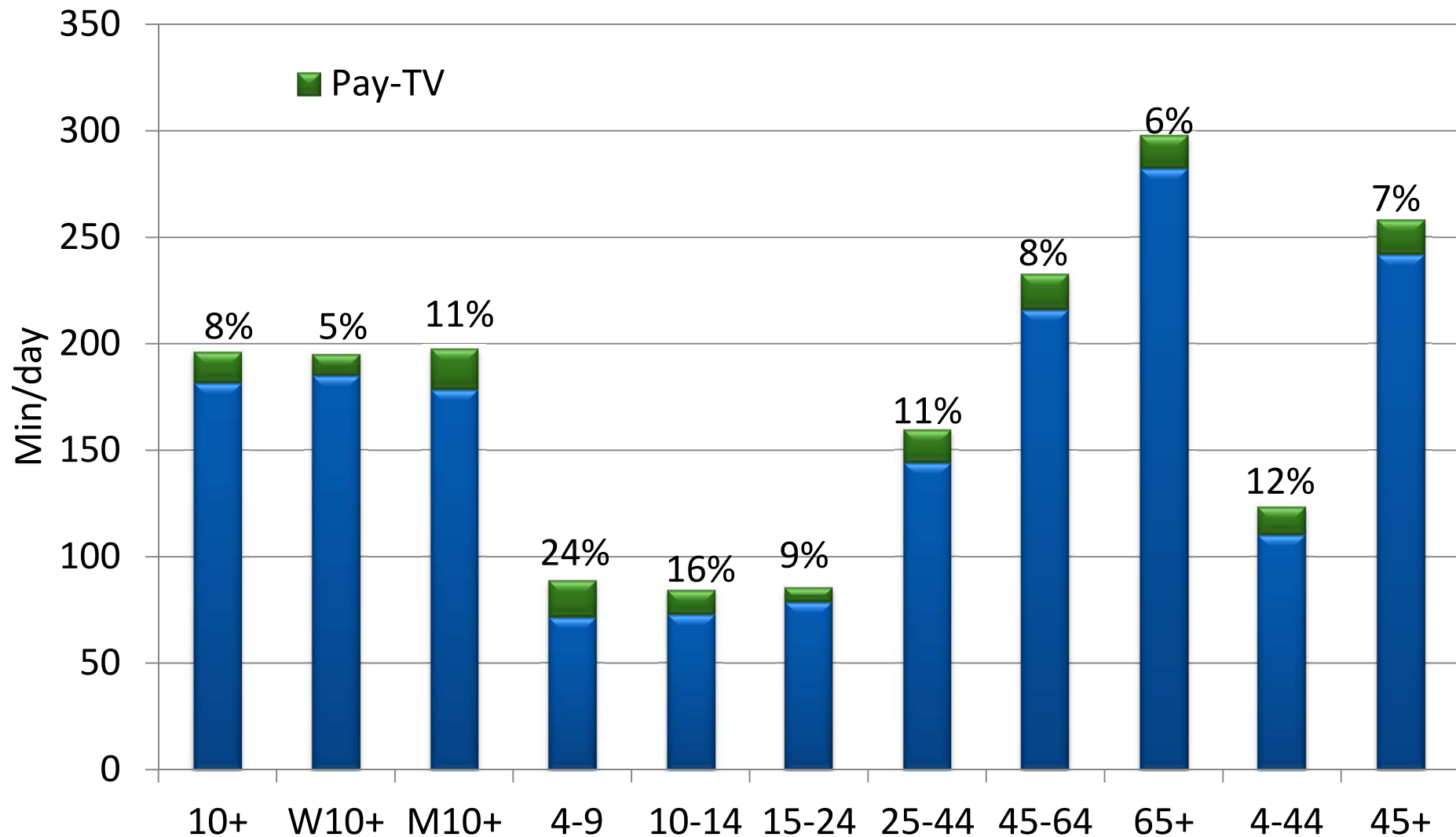
Pay TV penetration in Finland

% of TV HH's



Source: Finnpanel, TV households in Finland n= approx 1500 /questionnaire, since 2012/1 n= approx 3000, since 2013/1 n=approx 3400

Pay TV share of total viewing 2013

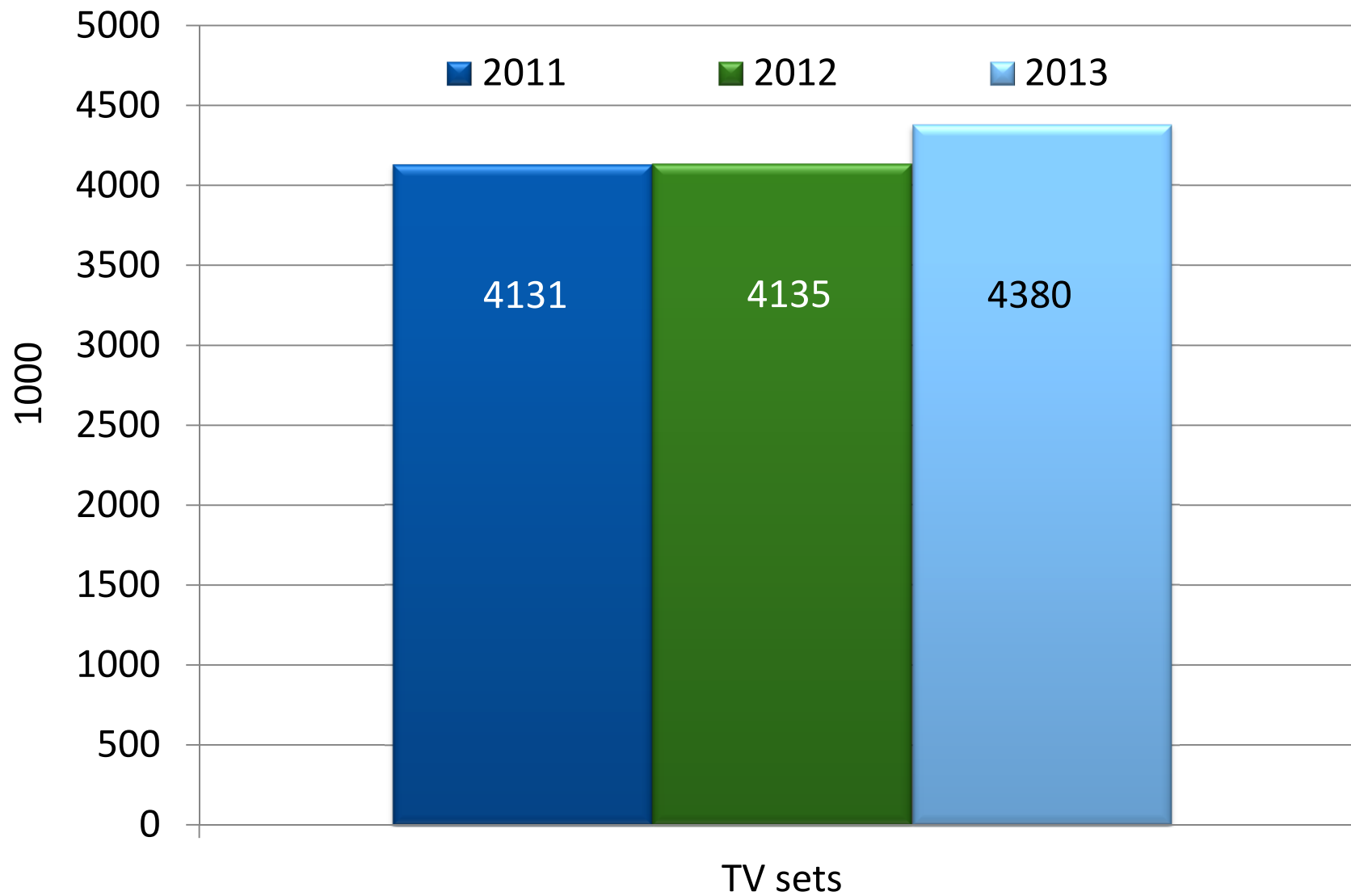


Source: Finnpanel Oy, TAM, incl. guests and timeshift viewing.

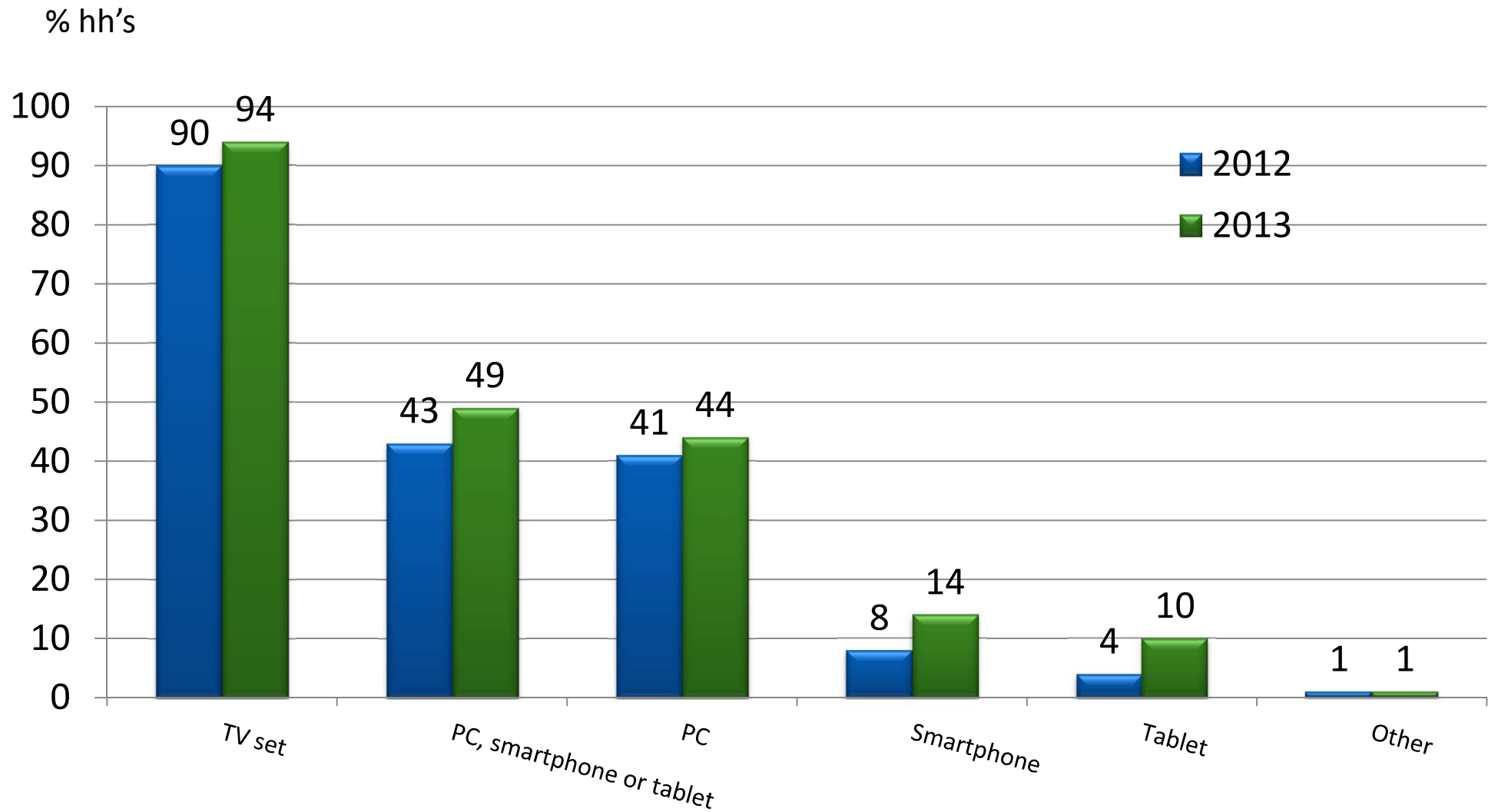
Pay-TV channels: Animal Planet, BBC Entertainment, BBC Lifestyle, BBC World, C More Movie channels, Digiviihde, Discovery, Disney Channel, Disney XD, Eurosport, Foreign satellite –channel group, MTV Fakta, MTV Fakta XL, MTV Juniori, MTV Komedija, MTV Leffa, MTV Max, MTV Sarja, MTV Sport 1, MTV Sport 2, National Geographic, Nelonen Maaailma, Nelonen Nappula, Nelonen Prime, Nelonen Pro 1, Nelonen Pro 2, SVT Eu, SVT1 (Sweden), SVT2 (Sweden), TV4 (Sweden), URHOtv, Viasat Movie channels, Viasat Other channels



No. of TV sets in Finland 2011–2013



To watch TV, which devices are used in your HH?



Televisions, tablets, laptops and PC's in Finland

% hh's

