Finnish Mass Media 2019

Mass media market

Mass media market grew marginally in 2019

The value of the mass media market was about EUR 3.9 billion in 2019. Compared to the year before, the value of the market grew by 0.5 per cent or EUR 19 million. The data are based on the calculations of Statistics Finland's mass media and cultural statistics.

Mass media market 2018 - 2019, EUR million

	2018 EUR mill.	2019 EUR mill.	2019 %	Change 2018-2019, %
Daily newspapers (7-4 times a week)[1)]	758	734	18.9	-3.2
Other newspapers[1)]	131	129	3.3	-1.5
Free-distribution papers[1)]	63	57	1.5	-9.5
Magazines and periodicals[1)]	440	400	10.3	-9.1
Books[2)]	545	526	13.6	-3.4
Publishing, total	**1,937**	**1,846**	**47.6**	**-4.7**
Television[3)]	1,220	1,280	33.0	4.9
Radio	71	73	1.9	3.2
Internet advertising	421	460	11.9	9.3
Electronic media, total	**1,712**	**1,813**	**46.8**	**5.9**
Audio recordings[4)]	81	89	2.3	9.3
Videos (dvd, blu-ray)	29	23	0.6	-19.2
Cinemas	97	104	2.7	6.6
Recorded media, total	**207**	**216**	**5.6**	**4.1**
All total	**3,856**	**3,875**	**100.0**	**0.5**
Source: Statistics Finland, Mass media and cultural statistics				

1) Digital publications included since 2010.

2) Electronic publications included (incl. audiobooks).

3) Including VOD. Including all Yle public service (tv, radio, web-service).

4) Including digital sales (incl. Spotify).

In 2019, sales in the publishing industry weakened in all industries included in Statistics Finland's calculation (incl. newspapers, free papers, magazines and periodicals and books). At the same time, the share of advertising in newspapers' income contracted further. Especially in the income of daily newspapers, the significance of circulation income has become emphasised in the 2010s. Less frequently published newspapers have managed to retain their advertising sales better in the 2010s than daily newspapers. (Appendix table 2.)

Value added tax on digital newspapers decreased to 10 per cent in July 2019. Because monthly sales figures are not available, annual sales have been calculated in the statistics according to the lowered value added tax. The actual sales of dailies, in particular, are thus slightly higher than indicated by the statistics. According to the Finnish Newspaper Association, digital products account for around 17 per cent of the net sales of newspapers, so the statistical method does not have a significant effect on the overall picture of the mass media market calculations.

In 2019, television was the biggest individual media industry with a volume of nearly EUR 1.3 billion, which corresponds to one-third of the entire media market. In the calculation, the television industry 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). The figures on pay TV activities and income from video on demand services compiled by the mass media statistics are, however, rough estimates based primarily on changes in the number of subscribers. Data on the number of subscribers are collected, for example, by Finnpanel.

The television industry grew, boosted by pay TV and, in particular, fees for video on demand services, by around five per cent compared to the previous year. In addition to international video on demand services (especially Netflix and HBO Nordic), the services of domestic and Nordic actors (e.g. Ruutu+, C More and Viaplay) also increased their number of subscribers. According to data collected by Kantar TNS, television advertising contracted compared to the previous year. The share of advertising in the income of all television activities has decreased considerably in the 2010s, because the growth in the industry has mainly occurred in pay TV activities. (Appendix table 5.)

Likewise according to data collected by Kantar, Internet advertising grew by nine per cent from the year before and amounted to EUR 460 million in 2019. According to data collected by IAB Finland, nearly 60 per cent of Finland's Internet advertising in 2019 trickled to international technology giants, Google and Facebook.

The year 2019 was also favourable for audio media: commercial radio grew by around three per cent and audio recordings by around nine per cent from the previous year. The figures are based on data from the industry association RadioMedia and the music information centre Music Finland, whereby recording sales take into account not only sales based on the data of IFPI Finland but also recording sales by parties outside the association. The recording sales calculations for 2017 and 2018 of the mass media statistics have been corrected to correspond to the more comprehensive calculations of Music Finland. Most of the recording sales are digital sales, incl. listening via the streaming service Spotify.

Cinemas attracted a large audience and had high ticket revenue again in 2019. According to Kantar, cinema advertising went up by 13 per cent from the previous year.

The figure describing physical video recording markets (incl. DVD, Blu-ray) is now for the second year based on a calculation commissioned by the Finnish Film Foundation. In previous years, the data have been based on wholesale statistics of video recordings compiled by the Finnish Chamber of Films and calculations published by the European Audiovisual Observatory (EAO) in its yearbook. The EAO has revised its calculations for 2014 to 2017, which has been taken into account in the time series published by Statistics Finland in autumn 2020.

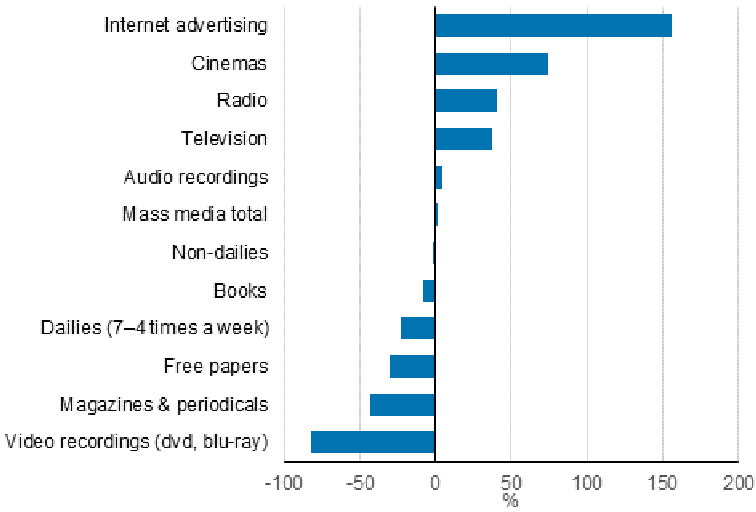
According to the Finnish Film Foundation's calculation, the sales of video recordings continued to decrease between 2018 and 2019. However, the enchantment of moving pictures has not decreased in the 2010s but rather grown when the popularity of video on demand services is taken into consideration. In Statistics

Finland's calculations of mass media markets, households' fees for video on demand services are currently included in the television industry.

In Statistics Finland's estimate, the mass media market increased for the fourth consecutive year. In 2012 to 2015, the mass media market contracted four years in a row. Also, in connection with the 2009 financial crisis, the value of the mass media market decreased compared to the year before. In all, the value of the mass media market has increased over the examined period of good two decades.

The growth of the industry has focused on electronic communication as the publishing industry has contracted. In Finland, the size of the media market has not changed significantly in the 2010s, but within the media field the shift in focus from print media to electronic communication has occurred quite rapidly.

Figure 1. Changes in the mass media market in 2009 to 2019, %



Source: Statistics Finland, Mass media and cultural statistics

Despite the slight growth recorded now, the size of the mass media market relative to the gross domestic product contracted further in 2019. In 2019, the share of the mass media in the entire national economy was 1.6 per cent according to preliminary calculations, while it was still 2.1 per cent ten years earlier.

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 table 1. Sector shares of the mass media market 2000 - 2019, per cent

	Publishing, per cent	Electronic media, per cent	Recorded media, per cent	Total, per cent	Total, EUR mill.
2000	72	20	8	100	3,133
2001	71	21	9	100	3,176
2002	70	21	9	100	3,231
2003	69	22	9	100	3,311
2004	68	23	9	100	3,464
2005	68	24	8	100	3,584
2006	67	25	8	100	3,724
2007	66	26	8	100	3,938
2008	64	28	8	100	4,079
2009	63	30	7	100	3,870
2010	62	31	7	100	3,995
2011	61	32	7	100	4,046
2012	60	33	7	100	4,030
2013	58	35	7	100	3,904
2014	56	38	6	100	3,771
2015	55	39	6	100	3,679
2016	54	40	6	100	3,732
2017	53	42	6	100	3,810
2018	50	44	5	100	3,856
2019	48	47	6	100	3,875
Source: Statistics Finland/Media statistics					

Appendix table 2. Breakdown of newspaper sales 2000 - 2019, per cent

Year	Dailies			Other newspapers		
	Advertising, per cent	Subscriptions and single copy sales, per cent	Total, per cent	Advertising, per cent	Subscriptions and single copy sales, per cent	Total, per cent
2000	58	42	100	59	41	100
2001	56	44	100	57	43	100
2002	54	46	100	54	46	100
2003	53	47	100	53	47	100
2004	53	47	100	54	46	100
2005	54	47	100	53	47	100
2006	55	45	100	53	47	100
2007	55	45	100	53	47	100
2008	55	45	100	54	46	100
2009	48	52	100	52	48	100
2010	49	51	100	51	49	100
2011	52	48	100	50	50	100
2012	50	50	100	51	49	100
2013	47	53	100	48	52	100
2014	45	55	100	48	52	100
2015	45	55	100	46	54	100
2016	45	55	100	46	54	100
2017	44	56	100	47	53	100
2018	43	57	100	45	55	100
2019	41	59	100	44	56	100

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 - 2019, per cent

Year	Subscriptions, per cent	Single copy sales, per cent	Advertising, per cent	Total, per cent
2000	59	8	33	100
2001	59	9	32	100
2002	60	9	31	100
2003	61	9	30	100
2004	62	9	30	100
2005	62	8	30	100
2006	62	8	30	100
2007	63	7	30	100
2008	64	7	29	100
2009	69	7	24	100
2010	70	7	23	100
2011	68	7	25	100
2012	70	7	22	100
2013	73	7	20	100
2014	74	7	19	100
2015	74	8	18	100
2016	77	7	17	100
2017	77	7	17	100
2018	76	6	17	100
2019	75	7	18	100
The figures are estimates.Source: Statistics Finland/Media statistics				

Appendix table 4. Radio advertising 2000 - 2019, per cent

Year	National advertising, per cent	Local advertising, per cent	Total , per cent
2000	50	50	100
2001	53	48	100
2002	57	43	100
2003	60	40	100
2004	63	37	100
2005	61	39	100
2006	63	37	100
2007	69	31	100
2008	70	30	100
2009	71	29	100
2010	74	26	100
2011	75	25	100
2012	75	25	100
2013	73	27	100
2014	73	27	100
2015	70	30	100
2016	70	30	100
2017	71	29	100
2018	71	29	100
2019	72	28	100
Source: RadioMedia			

Appendix table 5. Television (terrestrial + cable + satellite) revenue 2000 - 2019, per cent

Year	TV licence fee/ Yle tax, per cent	Advertising, per cent	Subscriptions		Total, per cent
			Pay-TV, per cent[1)]	Cable TV basic fees, per cent	
2000	49	37	3	11	100
2001	52	33	4	11	100
2002	50	33	4	13	100
2003	49	33	4	15	100
2004	49	33	4	14	100
2005	48	31	9	11	100
2006	46	31	12	11	100
2007	43	30	16	10	100
2008	40	28	22	9	100
2009	42	25	23	9	100
2010	41	27	23	9	100
2011	40	28	22	10	100
2012	42	27	22	10	100
2013	43	26	22	10	100
2014	43	24	23	10	100
2015	44	24	23	10	100
2016	42	23	25	10	100
2017	41	21	28	10	100
2018[2)]	39	20	32	10	100
2019	37	18	35	10	100

The figures are estimates.
Source: Statistics Finland/Media statistics
Estimates based on data from: FiCom, Ficora, Finnpanel, Kantar TNS, Company reports

1) Including VOD.

2) The figures for 2018 have been revised in Nov 2020 with more detailed information on VOD-subscriptions.

Statistics Finland

Suomen virallinen tilasto
Finlands officiella statistik
Official Statistics of Finland

Culture and the Media 2020

Inquiries

Kaisa Saarenmaa 029 551 3517
Head of Department in charge:
Hannele Orjala

joukkoviestimet.tilastokeskus@stat.fi
www.stat.fi
Source: Mass media and cultural statistics. Statistics Finland

Communication and Information Services, Statistics Finland
tel. +358 29 551 2220
www.stat.fi

ISSN 1796-0479
= Official Statistics of Finland
ISSN 2323-6345 (pdf)