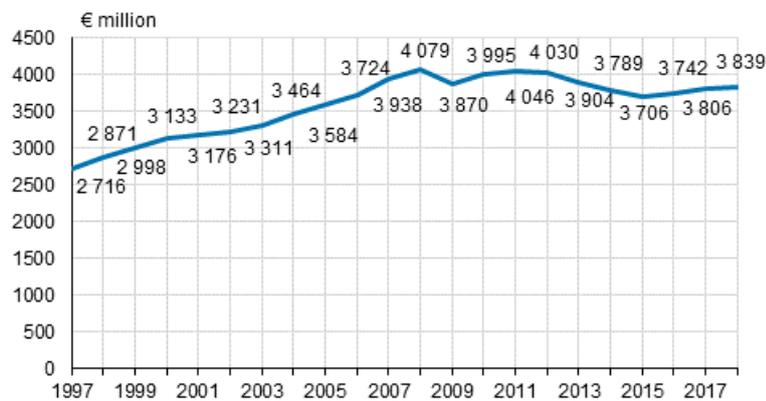


## Market trends in mass media stayed unchanged in 2018

The value of the mass media market was about EUR 3.8 billion in 2018. Compared to the year before, the value of the market grew by 0.9 per cent or EUR 33 million. The data are based on the calculations of Statistics Finland's mass media and cultural statistics.

In Statistics Finland's estimate, the mass media market increased marginally for the third 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.

### Mass media market 1997 to 2018, EUR million (at current prices)



Despite the slight increase recorded now, the size of the mass media market relative to the gross domestic product contracted further. In 2018, the share of mass media in the entire national economy was 1.7 per cent, while it was 2.1 per cent ten years earlier.

From 2008, the mass media market has contracted by 5.9 per cent and particularly the sales of physical video and audio recordings, as well as printed products has declined drastically.

## Mass media market 2017 - 2018, EUR million

	2017, EUR mill.	2018, EUR mill.	2018, %	Change, 2017-2018, %
Daily newspapers (7-4 times a week) <sup>1)</sup>	785	758	19.7	-3.4
Other newspapers <sup>1)</sup>	136	131	3.4	-3.7
Free-distribution papers <sup>1)</sup>	68	63	1.6	-7.4
Magazines and periodicals <sup>1)</sup>	470	450	11.7	-4.3
Books <sup>1)</sup>	549	545	14.2	-0.8
<b>Publishing, total</b>	<b>2,008</b>	<b>1,947</b>	<b>50.7</b>	<b>-3.0</b>
Television <sup>2)</sup>	1,145	1,206	31.4	5.3
Radio	67	71	1.9	6.3
Internet advertising	370	421	11.0	13.7
<b>Electronic media, total</b>	<b>1,582</b>	<b>1,698</b>	<b>44.2</b>	<b>7.3</b>
Audio recordings <sup>1)</sup>	64	68	1.8	5.6
Videos (dvd, blu-ray) <sup>3)</sup>	46	29	0.7	-38.1
Cinemas	105	97	2.5	-7.5
<b>Recorded media, total</b>	<b>216</b>	<b>194</b>	<b>5.0</b>	<b>-10.2</b>
<b>All total</b>	<b>3,806</b>	<b>3,839</b>	<b>100.0</b>	<b>0.9</b>

Source: Statistics Finland, Mass media and cultural statistics

1) Digital sales included.

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

3) The figure for 2018 is preliminary.

Sales in the publishing industry (incl. newspapers, free-distribution papers, periodicals and books) weakened in 2018 in all industries included in Statistics Finland's calculations. The share of advertising in newspapers' income decreased further in 2018. Only a handful of players in the newspaper and magazine industry, like the daily Helsingin Sanomat, have been able to increase their total circulation in the digital revolution. Several newspapers have also stopped auditing their circulation in recent years.

In 2018, television was the biggest individual media activity with its volume of EUR 1.2 billion, which corresponds with nearly 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 television industry grew boosted by pay TV and, in particular, video on-demand services, by good five per cent compared to 2017. Even though television advertising grew somewhat from 2017 according to data collected by Kantar TNS, the share of advertising in television revenues declined further. (Appendix table 5.)

Also, according to data collected by Kantar, Internet advertising grew by close on 14 per cent from the year before and amounted to EUR 421 million in 2018.

2018 was also favourable for audio media: commercial radio and audio recordings both grew by around six per cent from the previous year. The figures are based on data from RadioMedia and IFPI Finland.

During 2018, cinemas attracted a large audience even if the featured films did not include any unparalleled box office hits like the remake of the film Unknown Soldier in 2017. According to the Finnish Film Foundation's data, 8.1 million visits were made to cinemas in Finland in 2018. Finnish films attracted 1.9 million viewers, which corresponds with 24 per cent of all cinema visits.

The figure describing physical video recording markets (incl. DVD, Blu-ray) is preliminary and 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 in its yearbook. Due to changes in the data sources, the figure is not fully comparable with previous years.

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 - 2018, 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	42	6	3.806
2018	51	44	5	3.839

Source: Statistics Finland/Media statistics

**Appendix table 2. Breakdown of newspaper sales 2000 - 2018, 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
2018	43	57	45	55

Year	Dailies		Other newspapers	
	Advertising	Subscriptions and single copy sales	Advertising	Subscriptions and single copy sales
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 - 2018, per cent**

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
2018	77	6	17

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

**Appendix table 4. Radio advertising 2000 - 2018, 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
2018	71	29

Source: RadioMedia

**Appendix table 5. Television (terrestrial + cable + satellite) revenue 2000 - 2018, per cent**

Year	TV licence fee/ Yle tax	Advertising	Subscriptions, Pay-TV <sup>1)</sup>	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 <sup>2)</sup>	41	21	28	10
2018	39	20	31	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.

2) The figures for 2017 have been revised in Nov 2019 with more detailed information on VOD-subscriptions.

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Source: Mass media and cultural statistics. Statistics Finland