



Mediascope Europe



FINLAND RESULTS AND PAN-EUROPEAN COMPARISONS

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Presentation Agenda

1. Introduction

- Background
- Coverage and Methodology

2. Main Findings

- The Media Evolution
- Internet everywhere by any means
- Media multi-tasking means more active consumers
- Brand relationships grow via digital touchpoints
- The Internet is an entertainer and enabler
- Instant access to information at consumers fingertips
- Internet enriches consumer communication
- Online plays a key function in the purchase funnel

Background

- As part of their research remit, the IAB Europe conducts Mediascope Europe, widely recognised as the industry standard consumer research study on the European media landscape
- The broad aim of this study is to capture the different ways in which consumers are developing across Europe and assess their similarities and differences
 - Identify changing media consumption patterns
 - Evolution of media multi-tasking and emerging and evolving online media
 - Video consumption, social media and e-commerce



Coverage and Methodology

- Fieldwork took place in 28 markets in February 2012
- An Omnibus + Online methodology was used across all countries totalling nearly 50,000 interviews
- The application of quotas ensured that representative samples were achieved in each Market
 - quotas on age, gender, education and regional distribution were applied
 - Omnibus Finland: TNS
 - Online Finland: Annik



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The Media evolution

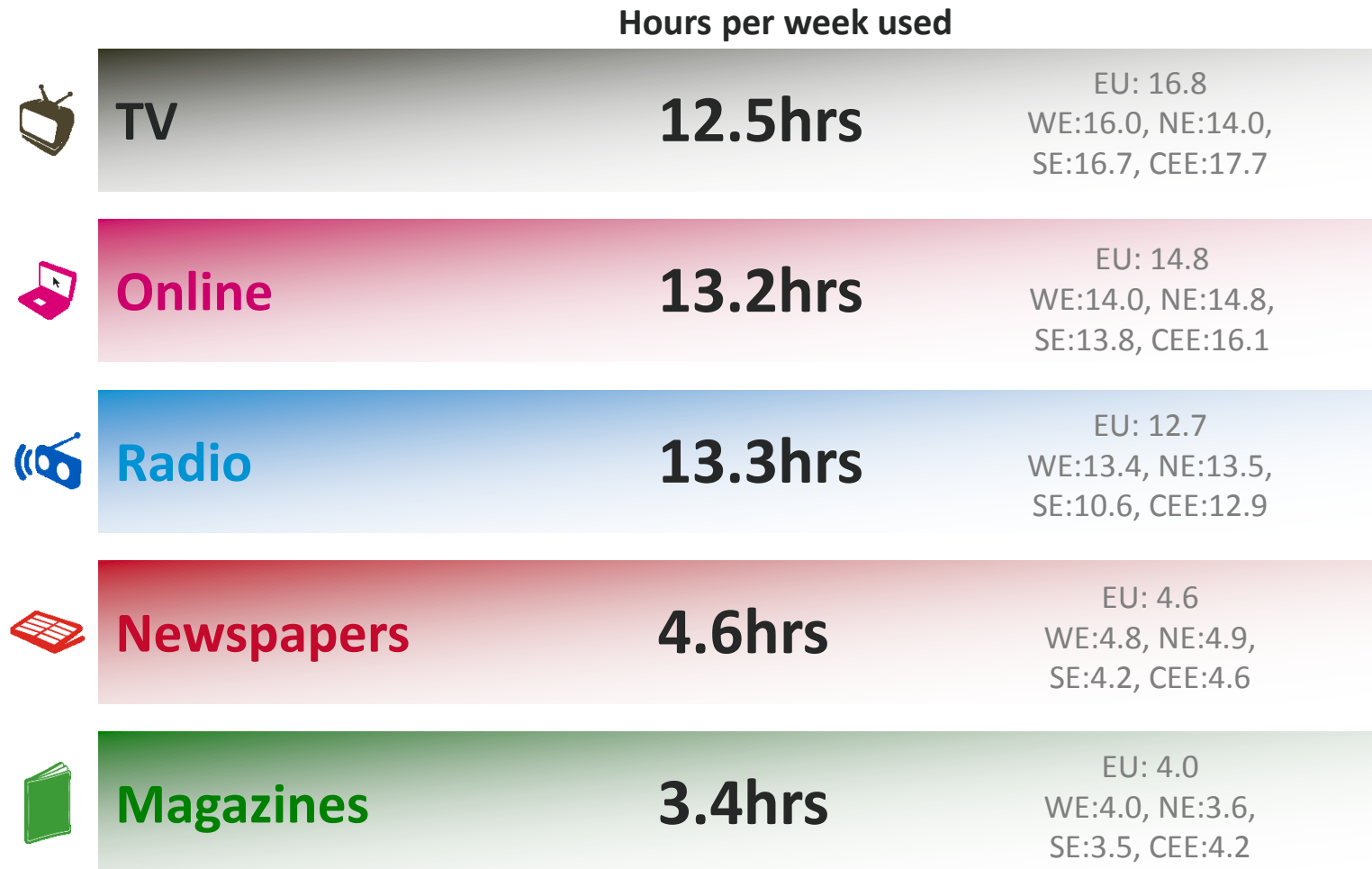


The Finnish media consumption landscape

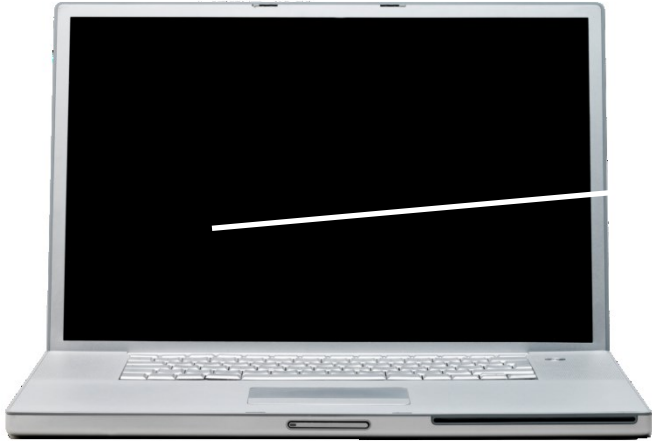
Penetration		
	TV	91% EU: 95%, WE:94%, NE:95%, SE:97%, CEE:95%
	Online	87% EU: 65%, WE:81%, NE:87%, SE:61%, CEE:55%
	Radio	83% EU: 64%, WE:82%, NE:85%, SE:68%, CEE:48%
	Newspapers	88% EU: 62%, WE:70%, NE:82%, SE:59%, CEE:56%
	Magazines	70% EU: 48%, WE:63%, NE:62%, SE:43%, CEE:39%

Base: All Respondents (Omnibus) n=1,004

The Finnish media consumption landscape



Internet becomes 'all consuming' media device

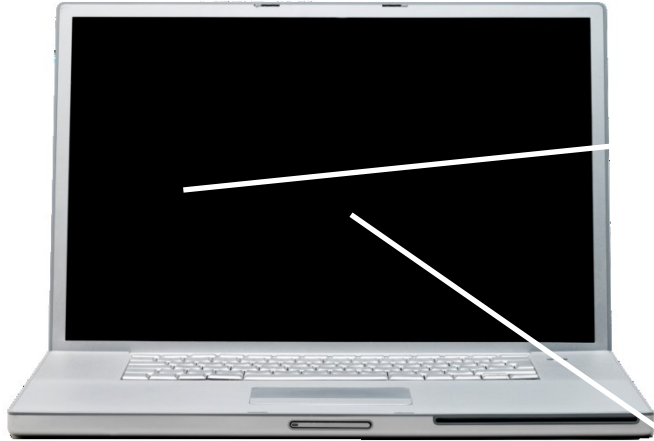


89%
of Finnish Internet
users watch TV
online

EU: 73%
WE: 67%
NE: 81%
SE: 65%
CEE: 81%

5% watch TV online at least daily
A further 28% watch TV at least weekly

Internet becomes 'all consuming' media device



68% of Internet users listen to the radio online

EU: 67%
WE: 61%
NE: 67%
SE: 64%
CEE: 73%

4% listen to the radio online at least daily
A further 12% listen at least weekly

96% of Internet users read news online

EU: 91%
WE: 86%
NE: 94%
SE: 91%
CEE: 96%

44% read news online at least daily
A further 27% read news at least weekly

Base: All internet users (Online) n=975

Internet everywhere by any means

A woman with long dark hair is looking down at a tablet computer she is holding. The background is a blurred library with bookshelves. A dark grey banner is overlaid on the image, containing white text.

0.3m

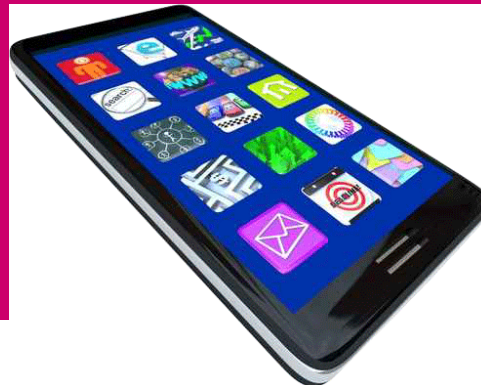
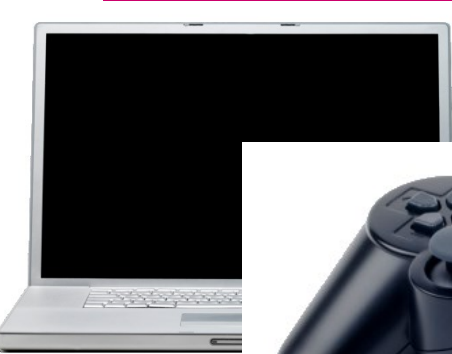
**Finns use a Tablet to
go online**

Base: All respondents (Omnibus) n=1,004

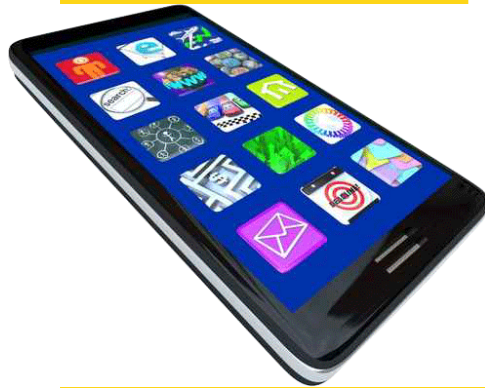
Increasing choice of Internet access

Accessing the internet via the computer is the most popular method – **Used by 3.9 million Finns (87% - EU:64%)**

However **39% of all Internet users** in Finland (EU:37%) go online via more than one device



The alternative ways of going online



29% Finns go online using a mobile

- Spend on average 5.3 hours per week (EU:9.4hrs)
- 85% use their mobile to go online during the day

7% Finns go online using a tablet

- Spend on average 5.7 hours per week (EU:9.3hrs)
- 84% use their tablet to go online in the evening



The alternative ways of going online



4% Finns go online using a games console

Media multi-tasking means more active consumers

58%

of Finns are
online whilst
watching TV

EU: 48% WE:58% NE:59% SE:39% CEE:44%



Base: All TV viewers n=887

Relationship between content consumption on TV and online

1.6 hours per week across Finland (EU:2.8hrs) is spent watching TV and online at the same time (13% (EU:16%) of all time spent watching TV)



Relationship between content consumption on TV and online

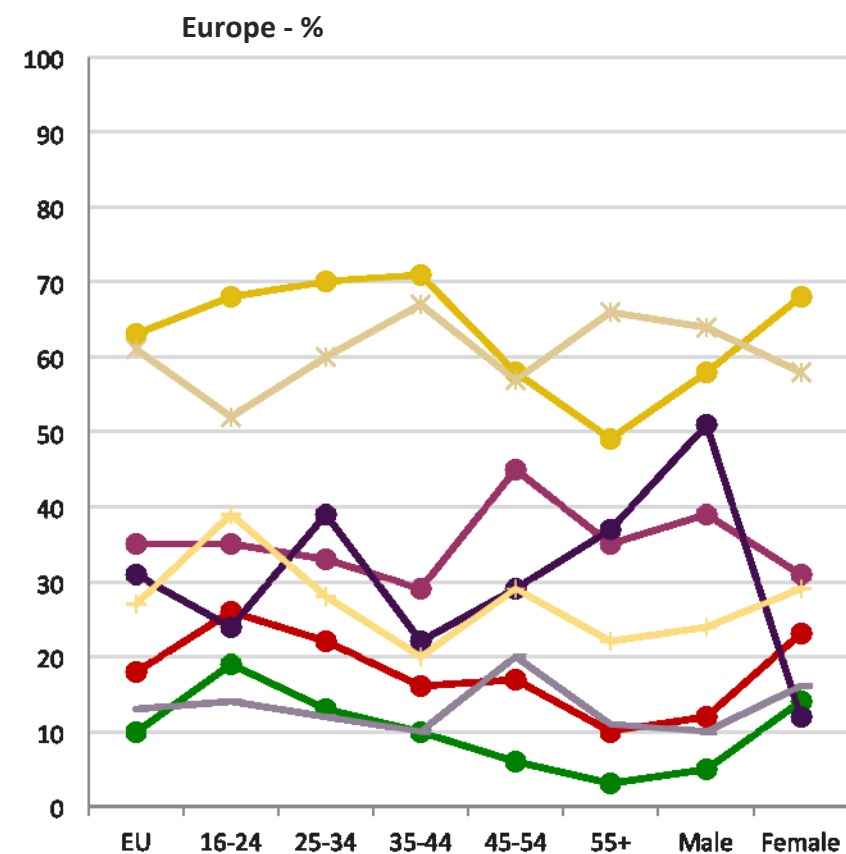
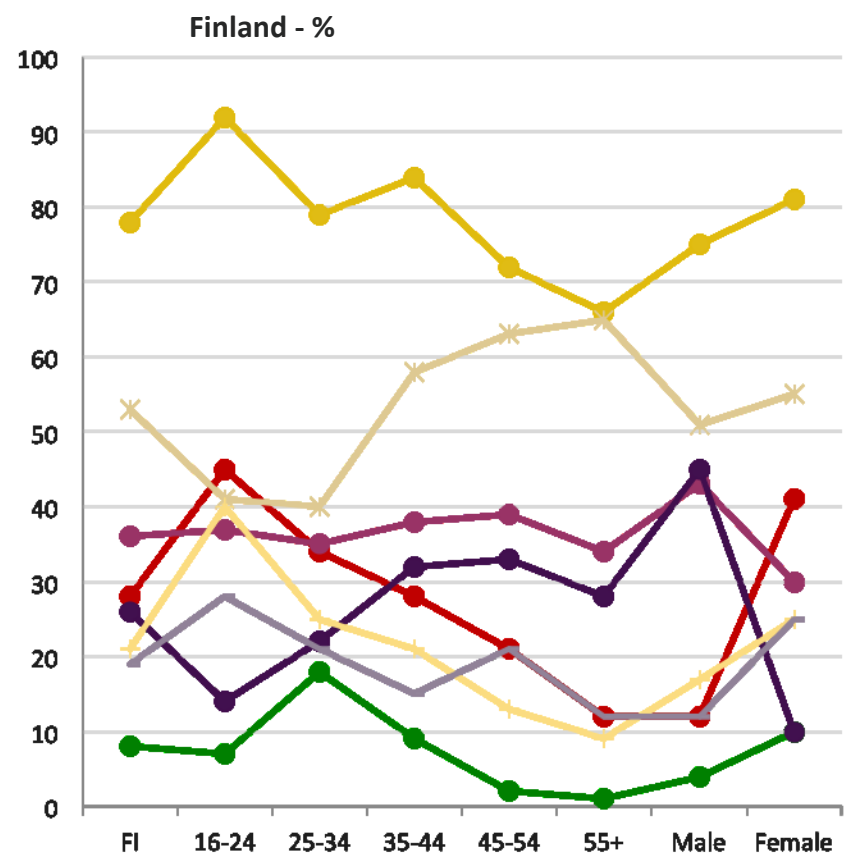
Programme Genre likely to be watching	Finland	EU	
Entertainment	78%	63%	WE:65%, NE:62%, SE:71%, CEE:60%
News	53%	61%	WE:52%, NE:47%, SE:56%, CEE:70%
Documentary	36%	35%	WE:41%, NE:35%, SE:33%, CEE:31%
Sport	26%	31%	WE:32%, NE:27%, SE:28%, CEE:31%
Music	21%	27%	WE:28%, NE:21%, SE:23%, CEE:27%
Lifestyle	28%	18%	WE:23%, NE:25%, SE:13%, CEE:14%
Adverts/Advertising	19%	13%	WE:15%, NE:16%, SE:14%, CEE:10%

2012 Media multi-tasking - TV and Internet – Genre of related content

Q5kiii. And which types of TV programmes or content do you tend to be watching whilst doing something related online?

2012 Genre of related content - %

Entertainment Lifestyle Kids Documentary News Sport Music Adverts/ advertising



Base: All European giving a response for using the internet whilst watching TV, n=17,413 All Finland giving a response for using the internet whilst watching TV, n=552

Multi tasking by Internet device



Internet users via a Tablet in Finland are most likely to multi task compared to other users of other internet devices

- **44%** do not use any other device whilst being online on a tablet (EU:15%)
- **12% watch TV** whilst are online on a tablet (EU:67%)

Brand relationships grow via digital touchpoints

Internet influence on purchase decisions for products



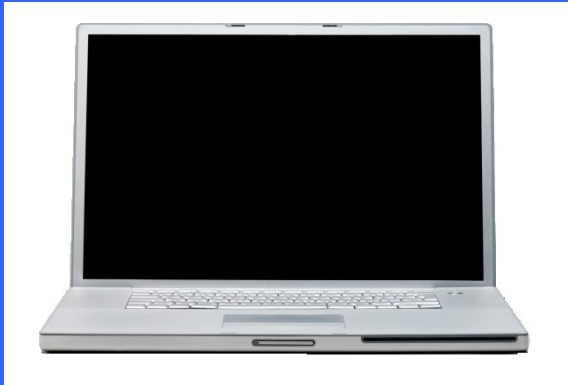
45%

of all Finnish Internet users state the internet helps them choose better products /service

EU: 51% WE:52% NE:46%
SE:45% CEE:53%

Base: All internet users (Online) n=975

Internet influence on purchase decisions for products



36%

of all Finnish Internet users are inclined to find out more about products they see advertised online

EU: 47% WE:35% NE:34%
SE:45% CEE:59%

Base: All internet users (Online) n=975

Internet influence on purchase decisions for products

The Internet is most important when deciding to purchase

Finland

EU

Travel tickets	62%	57%
Electrical goods	39%	57%
Holidays	63%	53%
Mobile handsets/contracts	48%	50%
Financial products or services	21%	47%
Cars	40%	44%
Clothes and accessories	30%	41%
Insurance	37%	39%
Toiletries/ Cosmetics	21%	35%
Health products	24%	35%
Home furnishings	28%	35%

Base: All internet users (Online) n=975

Consumers connecting via multiple touch-points



Among all Finnish Smart phone users:

- 57% are interested in location-based vouchers (EU:48%)
- 28% are interested in downloading a mobile phone app (EU:41%)

Among all Finnish Internet users:

- 32% are interested in connecting via social networks (EU:38%)
- 16% are interested in viewing video content as part of advertising campaigns (EU:30%)



Base: All smart phone users (Online) n=471, All internet users n=975

Benefits users get via digital

87%

EU: 81%
WE:83%
NE:85%
SE:79%
CEE:80%

of all Finnish Internet users state the internet helps them manage their lifestyle

66%

EU: 44%
WE:51%
NE:62%
SE:35%
CEE:40%

of all Finnish Internet users state the internet helps them manage finances

62%

EU: 43%
WE:54%
NE:61%
SE:44%
CEE:32%

of all Finnish Internet users state the internet helps them book holidays or make travel arrangement

69%

of all Finnish Internet users state the internet helps them keep in touch with friends or relatives

EU: 63% WE:62% NE:66% SE:61% CEE:64%

Base: All internet users (Online) n=975

The internet is an entertainer and enabler



76%

of Finns are online
during the traditional
primetime TV evening
slot (EU:52%)

Online is essential for entertainment

76%

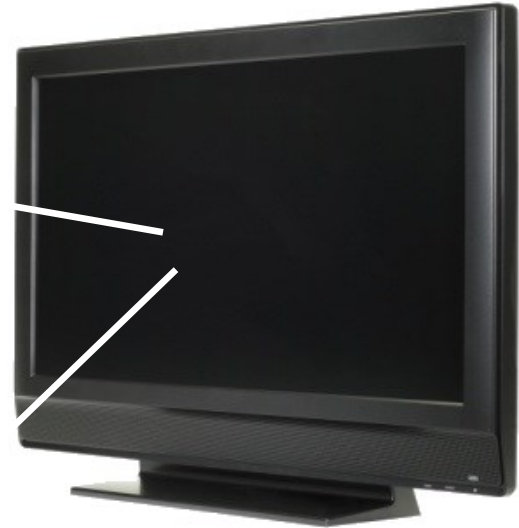
**of all Finns are
online during the
primetime
evening TV slot**

EU: 52% WE:67% NE:74%
SE:46% CEE:42%

82%

**of all Finns are
online during the
weekend**

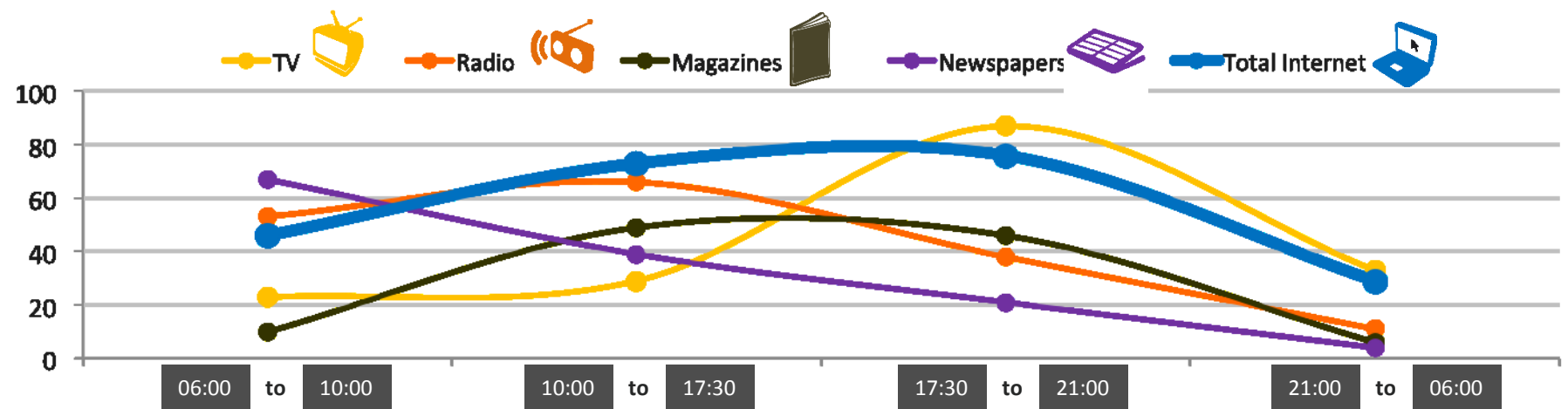
EU: 60% WE:76% NE:83%
SE:53% CEE:51%



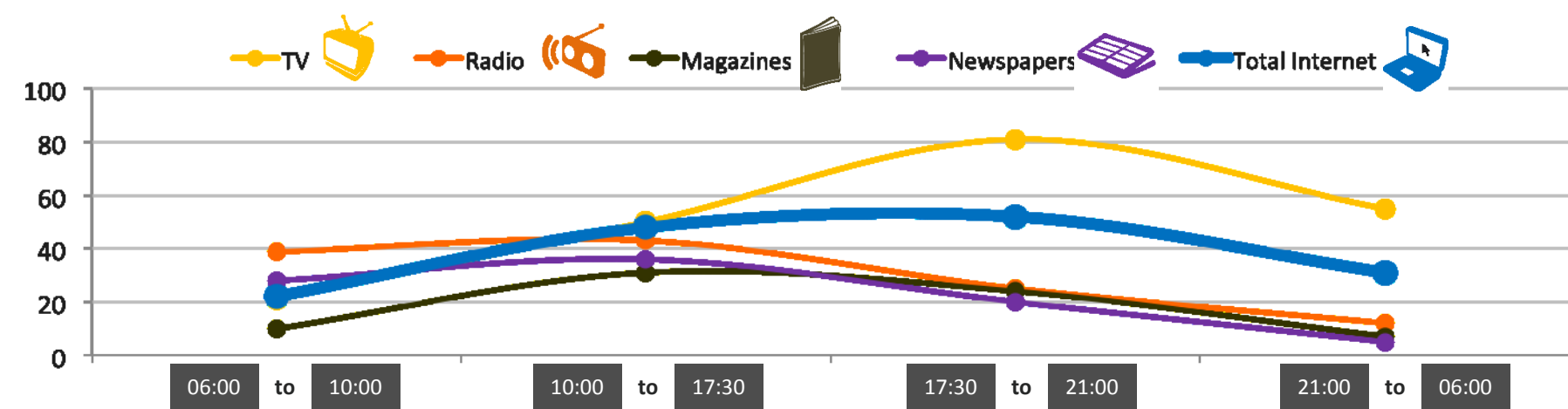
2012 Media use during the day (all)

Q1b/2b. What times of the day do you typically...during week?

2012 Finland Media use during the day (all) - %



2012 Total Europe Media use during the day (all) - %



Base: All European respondents (n=22,918), All Finland respondents (n=1004)

Online is essential for entertainment

Entertainment Activities Ever Carried Out	Finland	EU	
Watch video clips	84%	81%	WE:77%, NE:86%, SE:83%, CEE:83%
Listening to radio	68%	67%	WE:61%, NE:67%, SE:64%, CEE:73%
Listening to music online	65%	66%	WE:52%, NE:65%, SE:66%, CEE:77%
Watch a film	59%	66%	WE:52%, NE:60%, SE:63%, CEE:80%
Watch online TV	73%	60%	WE:51%, NE:69%, SE:54%, CEE:68%
Watch live events	62%	59%	WE:49%, NE:59%, SE:62%, CEE:67%
Music downloads	46%	57%	WE:47%, NE:47%, SE:52%, CEE:69%
Online gaming	53%	55%	WE:43%, NE:45%, SE:55%, CEE:66%
Use catch up or on demand TV	84%	54%	WE:55%, NE:63%, SE:40%, CEE:57%
Download video clips	52%	52%	WE:39%, NE:49%, SE:54%, CEE:62%
Download a film	39%	51%	WE:36%, NE:39%, SE:56%, CEE:63%
Download a TV programme	46%	46%	WE:38%, NE:45%, SE:44%, CEE:53%
Podcasting	40%	43%	WE:37%, NE:42%, SE:45%, CEE:49%

Instant access to information at consumers fingertips



Websites visited

Top Websites used at least **Daily**

	Finland	EU
Social media	48%	43%
News	44%	40%
Video	10%	18%
Banking and Finance	12%	16%
Hobby	8%	15%
Sports	6%	12%
Forums	8%	11%
Jobs	3%	11%
Music	3%	10%
Local information	5%	9%

Top Websites used at least **Monthly**

	Finland	EU
News	85%	78%
Social media	68%	70%
Video	65%	67%
Banking and Finance	86%	66%
Maps	62%	61%
Local information	62%	60%
Other Hobby	56%	58%
Films	31%	52%
Music	33%	52%
Price Comparison Sites	41%	49%

Internet enriches consumer communication

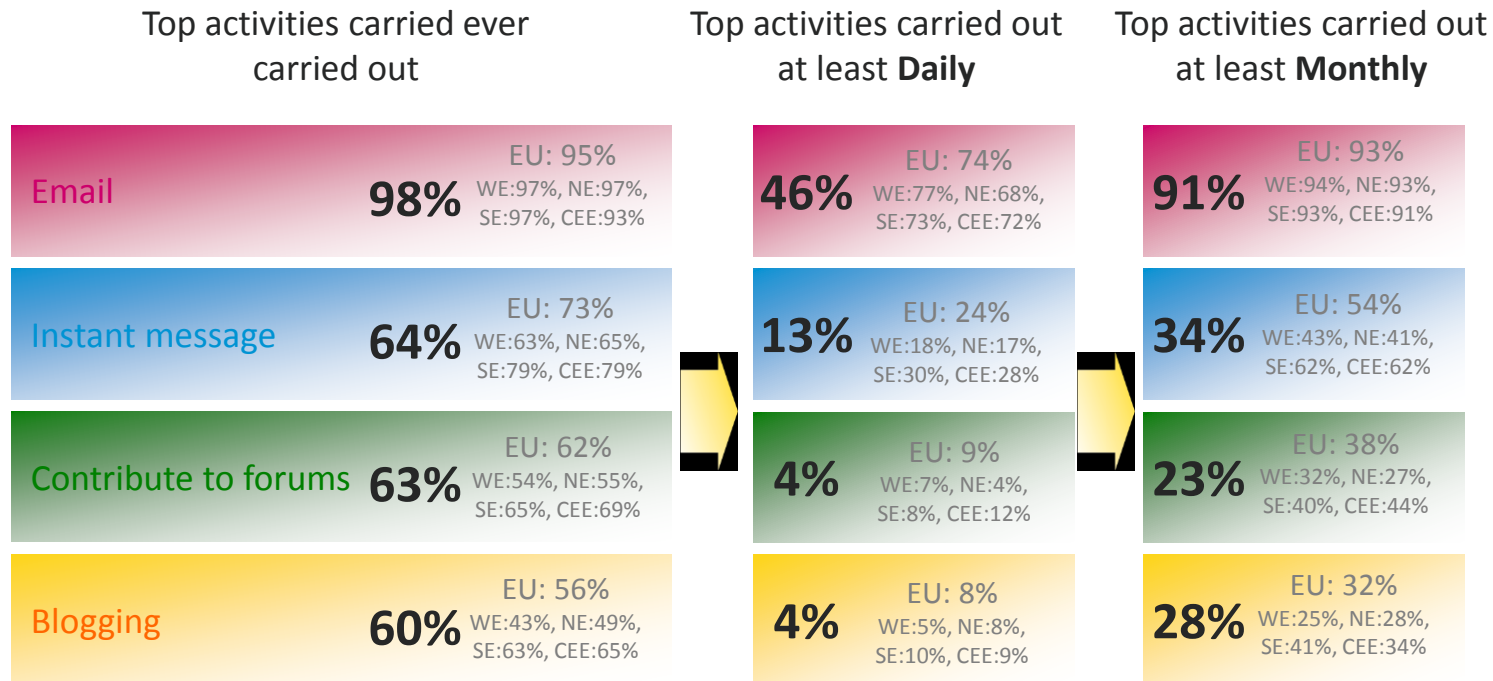
98%

of Finnish Internet users
communicate through email



Base: All internet users (Online) n=975

Communicating online



Communication with friends and family on Social media

79%

of all Finnish Internet
users have used a
personal or professional
Social Media website

EU: 81%

WE:73%, NE:80%, SE:84%, CEE:87%



Communication with friends and family on Social media

Top activities carried out at least **Daily**

Read emails I had received	72% EU: 77%
Read updates/ messages	48% EU: 42%
Contacted someone specific	9% EU: 22%
Posted an update	12% EU: 17%
Played games	13% EU: 17%
Commented on photos/ videos	4% EU: 10%
Updated my profile	6% EU: 8%
Uploaded photos/ videos	1% EU: 6%

Top activities carried out at least **Monthly**

Read emails I had received	90% EU: 91%
Read updates/ messages	79% EU: 80%
Contacted someone specific	62% EU: 63%
Posted an update	47% EU: 53%
Commented on photos/ videos	36% EU: 49%
Uploaded photos/ videos	26% EU: 49%
Played games	41% EU: 48%
Updated my profile	37% EU: 43%

%s Among Social Media users

Base: All who use social media (Online) n=896

Communications with brands on Social media

Top activities carried out at least Monthly



Top activities ever carried out



%s Among Social Media users

Base: All who use social media (Online) n=896

Purchasing online

97%

of all Finnish Internet users research online for purchases

EU: 96%

WE:97%, NE:97%, SE:97%, CEE:93%

13%

of all total shopping made is conducted online among Finnish Internet users

EU: 19%

WE:24%, NE:16%, SE:15%, CEE:16%

91%

of all Finnish Internet users shop online

EU: 87%

WE:94%, NE:94%, SE:88%, CEE:80%



%s Among Internet users

Spend online

11

is the average number of purchases made per person in Finland across a 6 month period

EU: 13

€684

is the average amount spent per person in Finland across a 6 month period

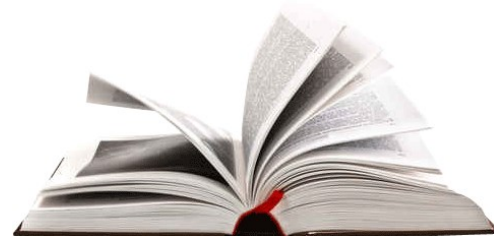
EU: €544



%s Among Internet users/P6M purchasers

Products purchased

Most popular products purchased online



Books	40%	EU: 43%
Clothes and accessories	45%	EU: 38%
Travel tickets	52%	EU: 34%
Electrical goods	22%	EU: 32%
Holidays	33%	EU: 28%
Toiletries/ Cosmetics	21%	EU: 26%
Concert, theatre or festival tickets	32%	EU: 25%

To summarise

Other media – TV, radio, newspapers are increasingly being consumed online but Finnish pattern is different to other markets

Accessing the internet is no longer solely via traditional computer with people accessing more and more via mobiles, tablets and games consoles

The Internet influences people's perceptions of brands and products, especially when they are consuming across more digital devices

Increasingly people are watching TV and using the internet at the same time but other offline media are consumed in more of a 'solus' mode in Finland

THANKS

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