



Commercial radio in Finland

Audio consumption is increasing and diversifying.
Radio reaches the majority of Finns

RadioMedia

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Brand or Performance? Audio Combines Brand Impact and Marketing Efficiency

Marketing effectiveness is currently one of the most widely debated topics in the industry. Many advertisers are struggling with over-optimisation: marketing activities are increasingly driven by short term clicks, conversions and highly targeted campaigns. At the same time, reach narrows and long term brand building is pushed into the background. As a result, marketing effectiveness may actually decline when the same audiences are reached repeatedly without attracting new consumers.

The debate around “brand versus performance” is therefore somewhat misleading. In reality, the most effective marketing requires both. This is where radio and digital audio excel.

Research shows that radio and digital audio together create an exceptionally effective marketing combination. They build awareness, memorability and strong mental availability among broad audiences, while also supporting website traffic, search activity, conversions and sales.

Audio does not only build brands over the long term. It is also highly effective in driving short term performance.

Sound has a unique power in advertising. The most effective campaigns combine broad reach with strong and distinctive audio assets that are used consistently across media channels over time. At the same time, the importance of creative execution is amplified. A distinctive voice, a recognisable sonic identity and a strong creative idea make campaigns more memorable and strengthen their impact across all channels.

One of audio advertising's greatest strengths is its high attention value. Studies show that audio generates more attention seconds on average than television, video or digital advertising. In a receptive listening environment, messages are more likely to be remembered, and attention has become one of the most valuable currencies in today's media landscape.

Radio's strength is also reflected in its ability to enhance the effectiveness of other marketing activities. When a brand is

familiar through audio, digital advertising, search marketing and social media tend to perform more effectively. As a result, radio's contribution is often visible in the improved ROI of the entire media mix rather than only in the results of a single channel.

At a time when marketing risks becoming little more than optimisation, radio and audio offer something essential: broad reach, awareness, emotional impact and creativity. These are the elements that drive sustainable growth.

In this annual review, we have brought together research, insights and key facts on the effectiveness, reach and strategic value of radio and audio in marketing, both today and in the future.

We hope you enjoy reading it.

Stefan Möller
CEO, RadioMedia

Year 2025 in numbers

3.4
million Finns listen
to commercial radio
every week

Commercial
radio reaches
66%
of Finns

10 h 52 min
of listening to
commercial radio / week

68%
of listening is
from live radio



55
commercial
radio channels

9:00 a.m.
Radio's peak
listening time



Commercial radio is exceptionally strong in Finland

1

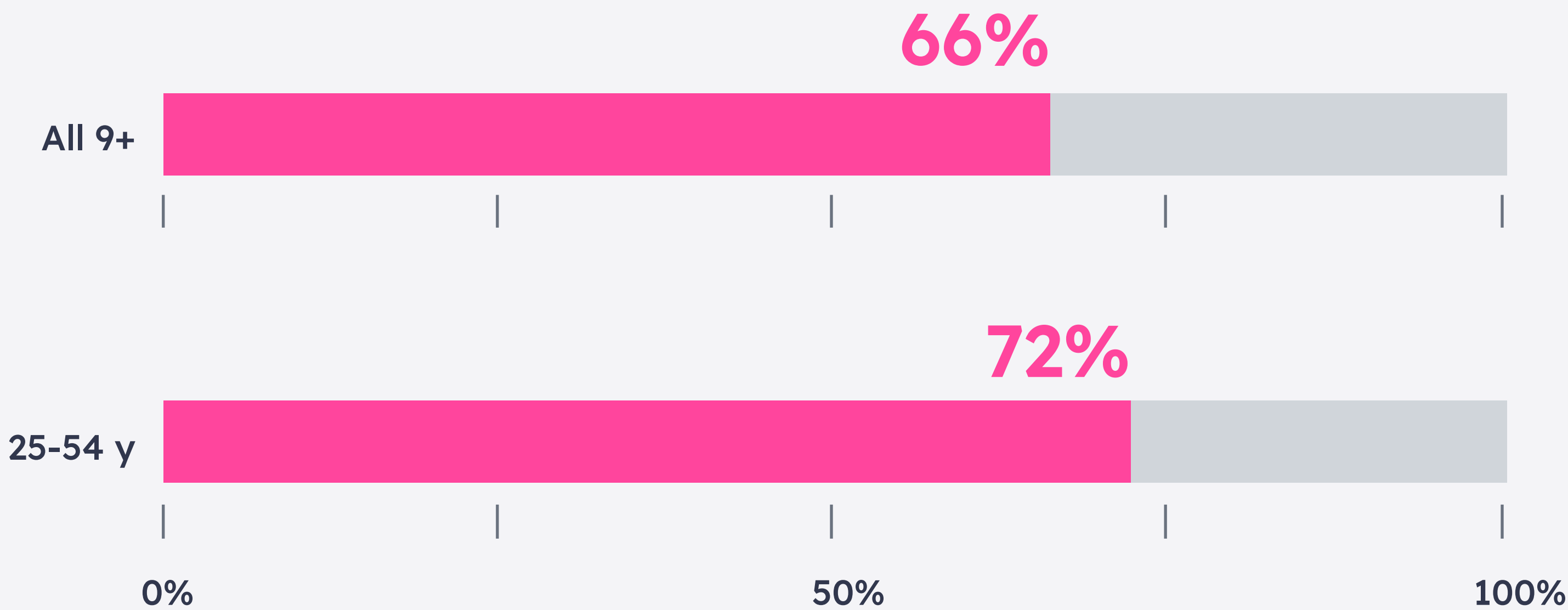
Radio reaches Finns



75% of 25–54-year-olds listen to commercial radio weekly.

Nearly half listen daily*

The reach of commercial radio in Finland in a week



Time spent listening to radio

1 h 33 min in a day
10 h 52 min in a week

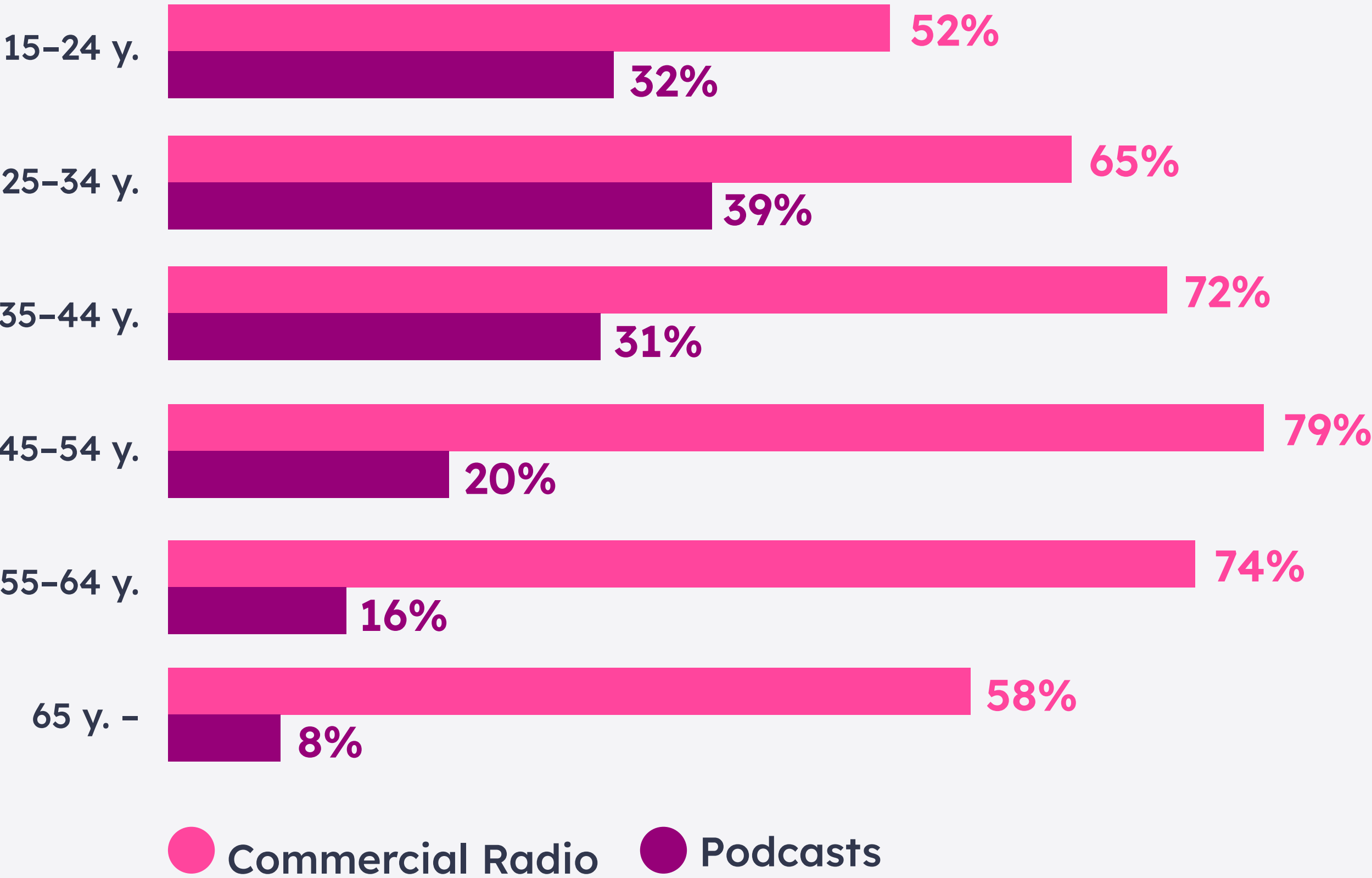
1 h 21 min in a day
10 h 21 min in a week

Source: *45% of 25–54-year-olds listen to commercial radio stations daily. Source: Finnpanel, National Radio Survey 2025

Commercial Radio Reaches Consumers of All Ages

Podcasts Are Most Popular Among Younger Audiences

Weekly Reach of Commercial Radio and Podcasts (%)



Young Audiences have the highest recall of radio advertising.

▶ See more on page 25

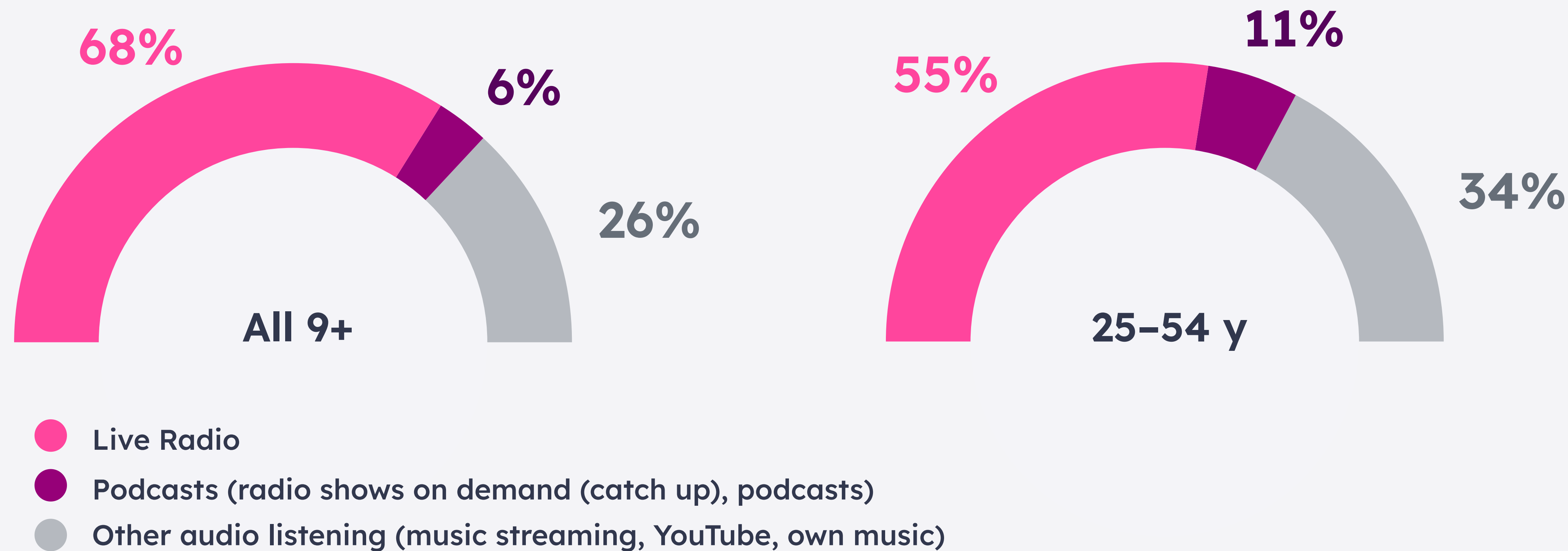
Commercial radio is part of the daily lives of consumers in their busiest family and working years.

▶ See more on page 26

Adults aged 55-64 are a high-spending consumer group seeking advertising tailored to them

▶ See more on page 27

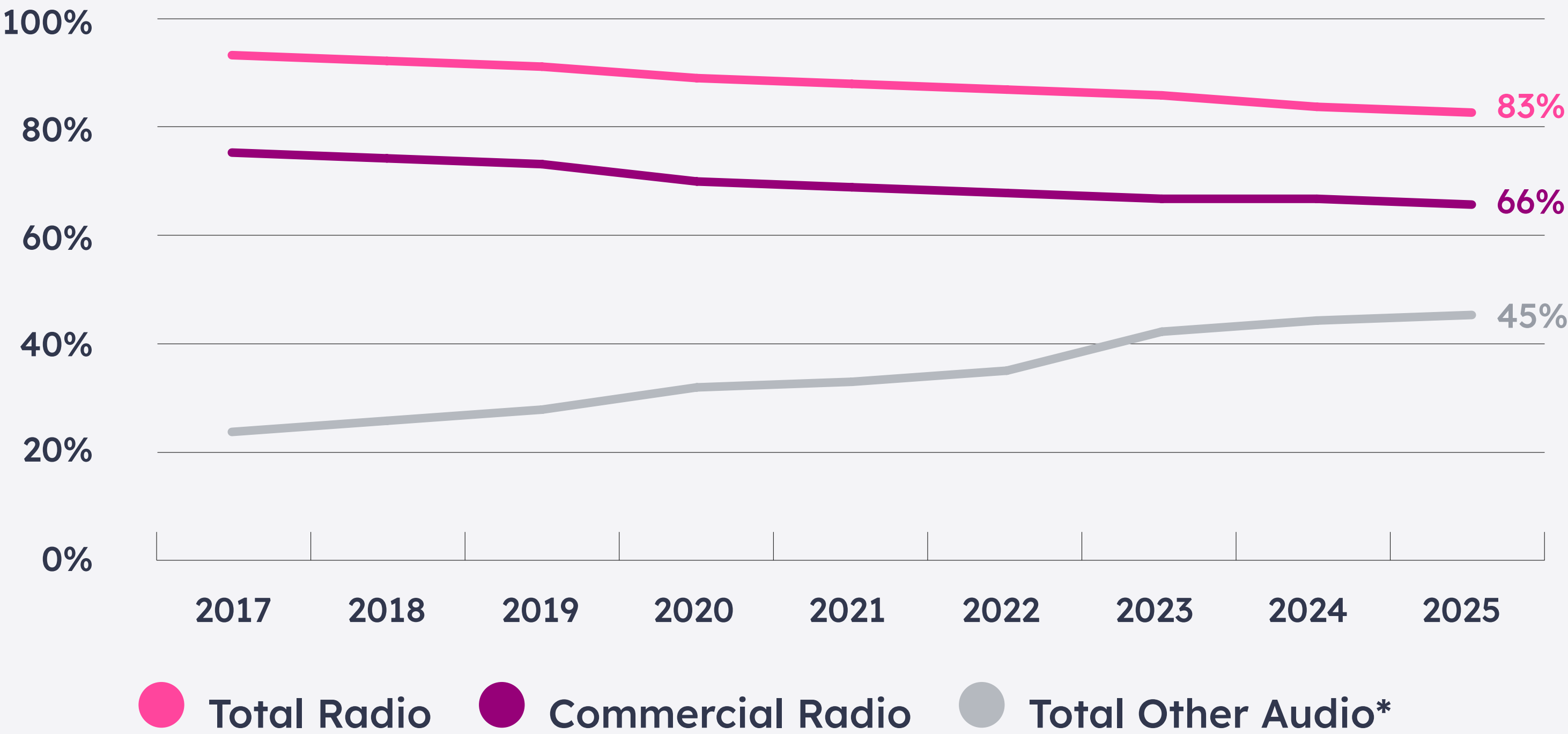
Radio accounts for the majority of audio listening time



The share of audio listening on an average day.
Source: Finnpanel, National Radio Survey 2025. Average audio listening shares during the week, based on the whole year's quarterly data.

Total Audio Consumption Is Growing

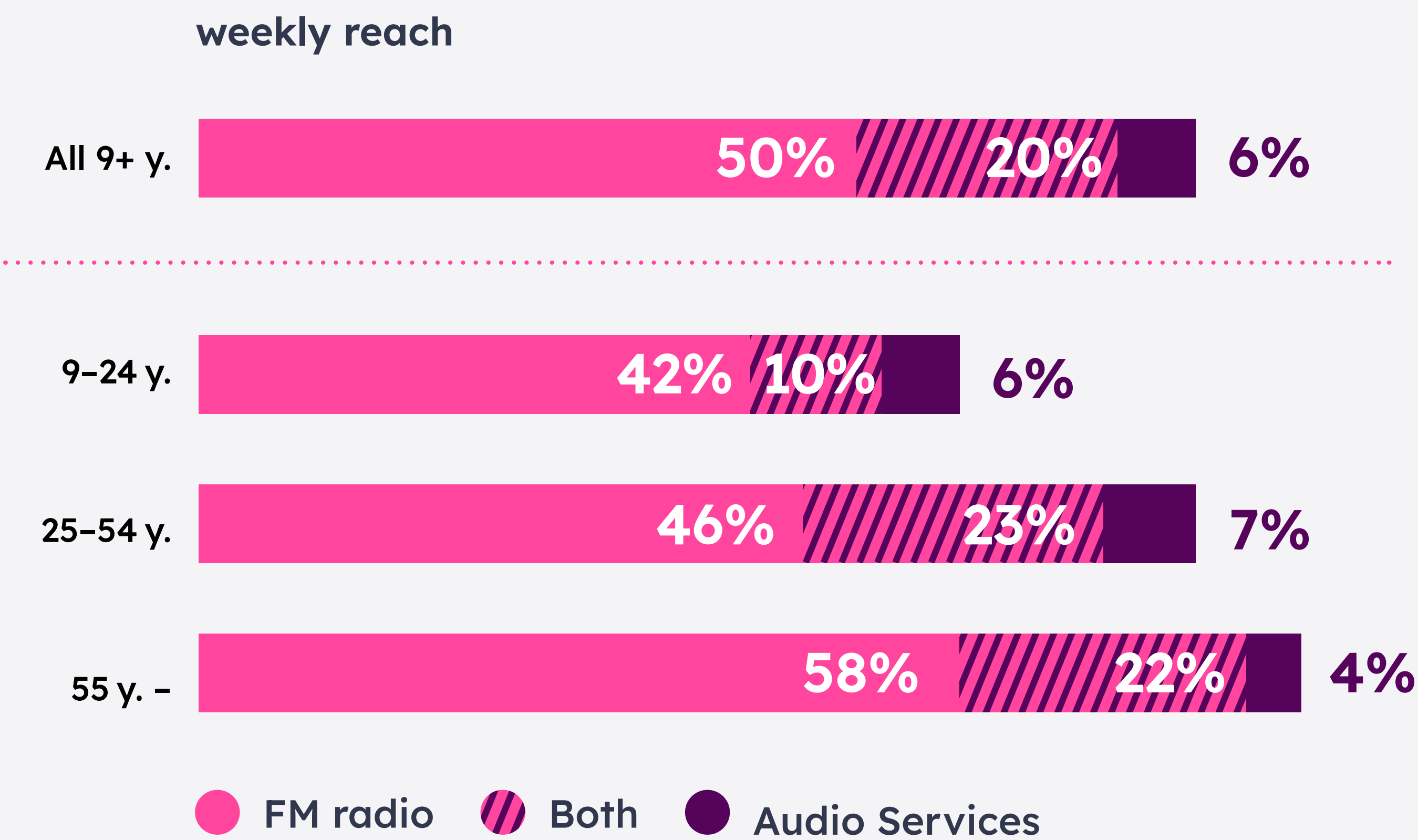
Weekly reach of radio and other audio (%), all individuals aged 9+



Radio, podcasts
and catch-up radio
content reach
89%
of Finns
every week.

* Other Audio = podcasts, music streaming and audiobooks
Source: Finnpanel, National Radio Survey, Annual Reports 2017–2025. Weekly radio reach among individuals aged 9+ and listening to Audio On Demand content.

Finnish audio services reach 1.3 million weekly listeners



FM radio remains the most widely used audio platform in Finland.

A growing number of Finns listen both to live radio and to on-demand content via digital audio services.



+ Includes radio companies' own streaming services

2

Radio delivers results for advertisers



NRJ:n iltapäivä, NRJ

On the radio, target your message



In radio,
advertising can
be targeted both
**nationally and
locally.**

.....

On top of **various
everyday situations
and times of the day**,
radio offers excellent
opportunities for
geographical targeting
throughout the
country.



Over 50 radio channels selling advertising space

There are over 50 commercial radio channels in Finland with different profiles selling advertising time. There are many stations and different channel formats, and they offer advertisers different media environments with many kinds of content connections.

LOCAL RADIOS,
SASTAMALA



SASTAMALA
JANNE
FORSSA



FORSSA
HÄMEENLINNA
SASTAMALA

BAUER MEDIA

























SANOMA MEDIA FINLAND















OTHER RADIO CHANNELS























DIGITAL SERVICES

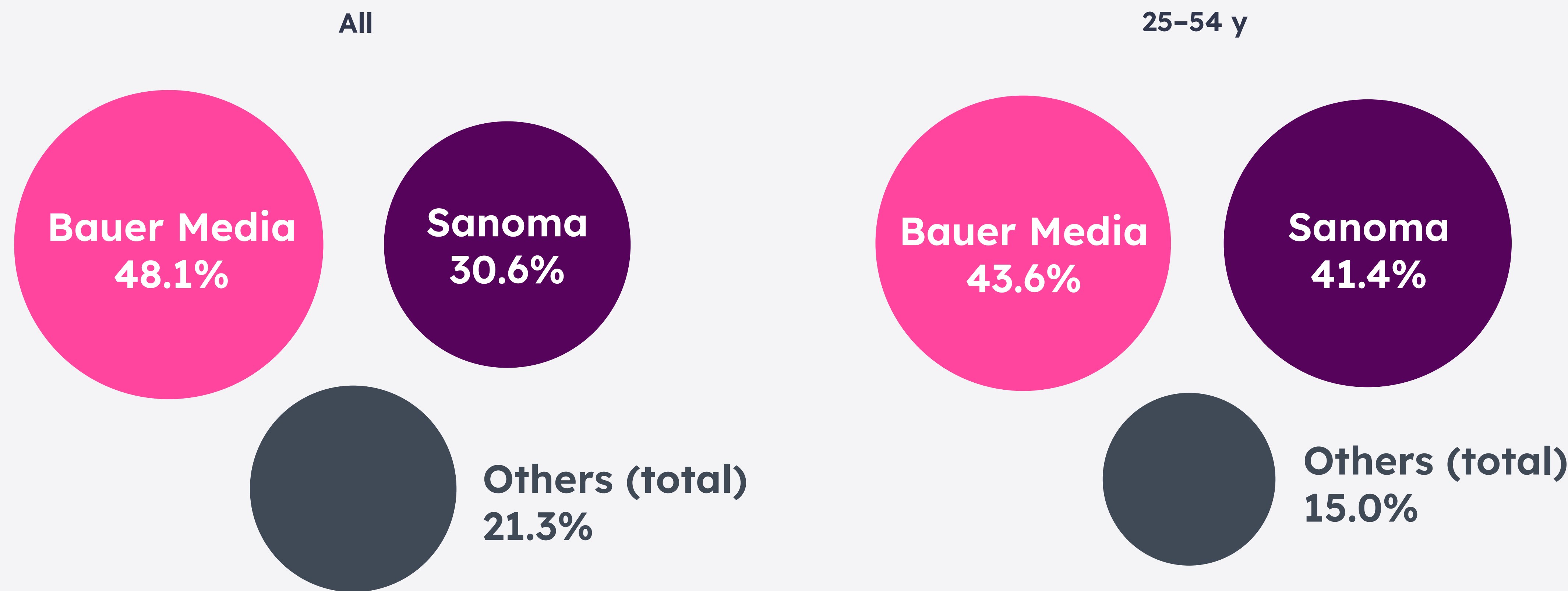






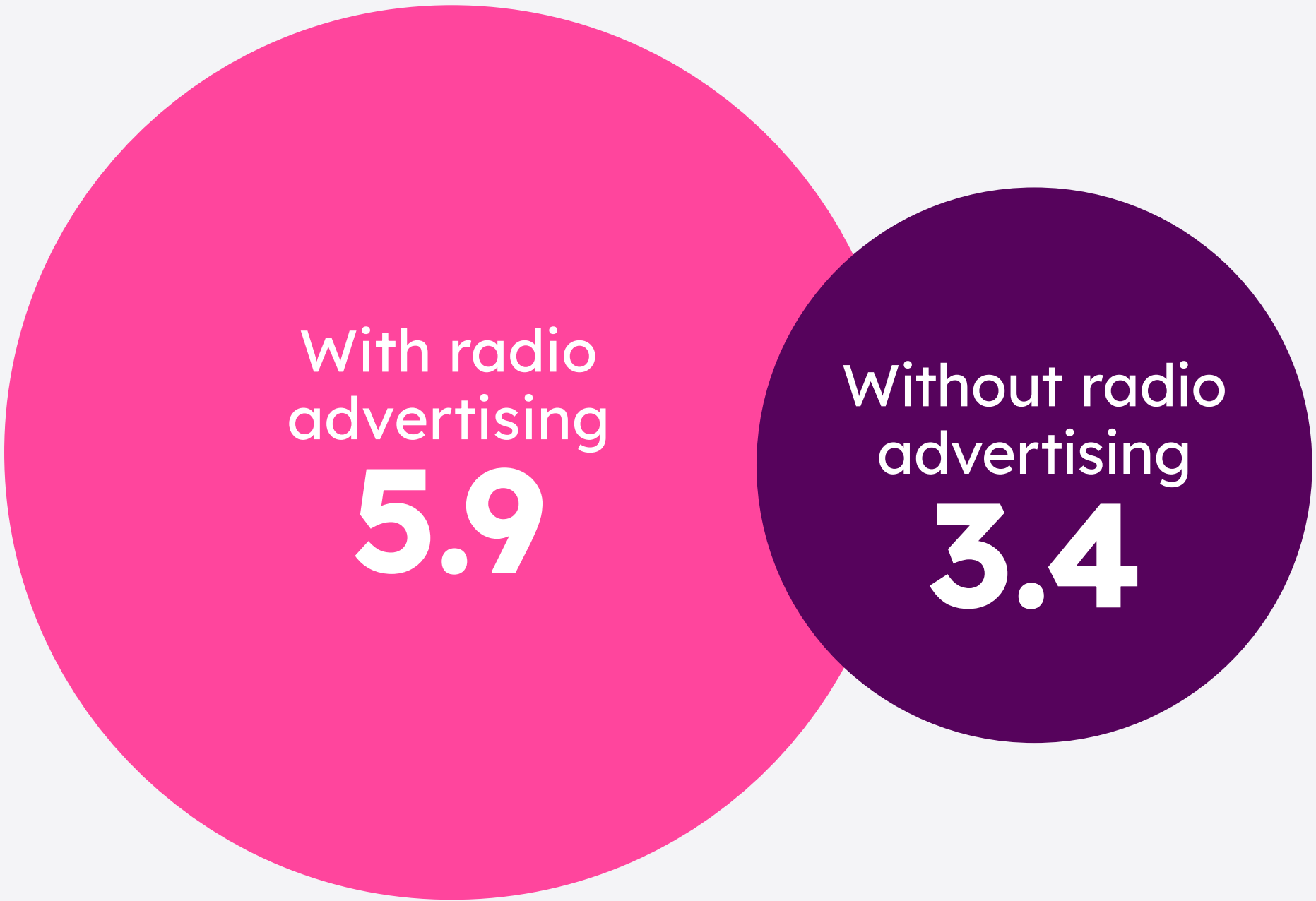


72% of Radio Listening Among 25–54-Year-Olds is to Commercial Radio Stations



Total ROMI is notably higher, when radio advertising is included in the media mix

Total ROMI:



- Audio strengthens overall marketing effectiveness
- Average Total ROMI reaches 5.9 when audio advertising is included in the media mix.

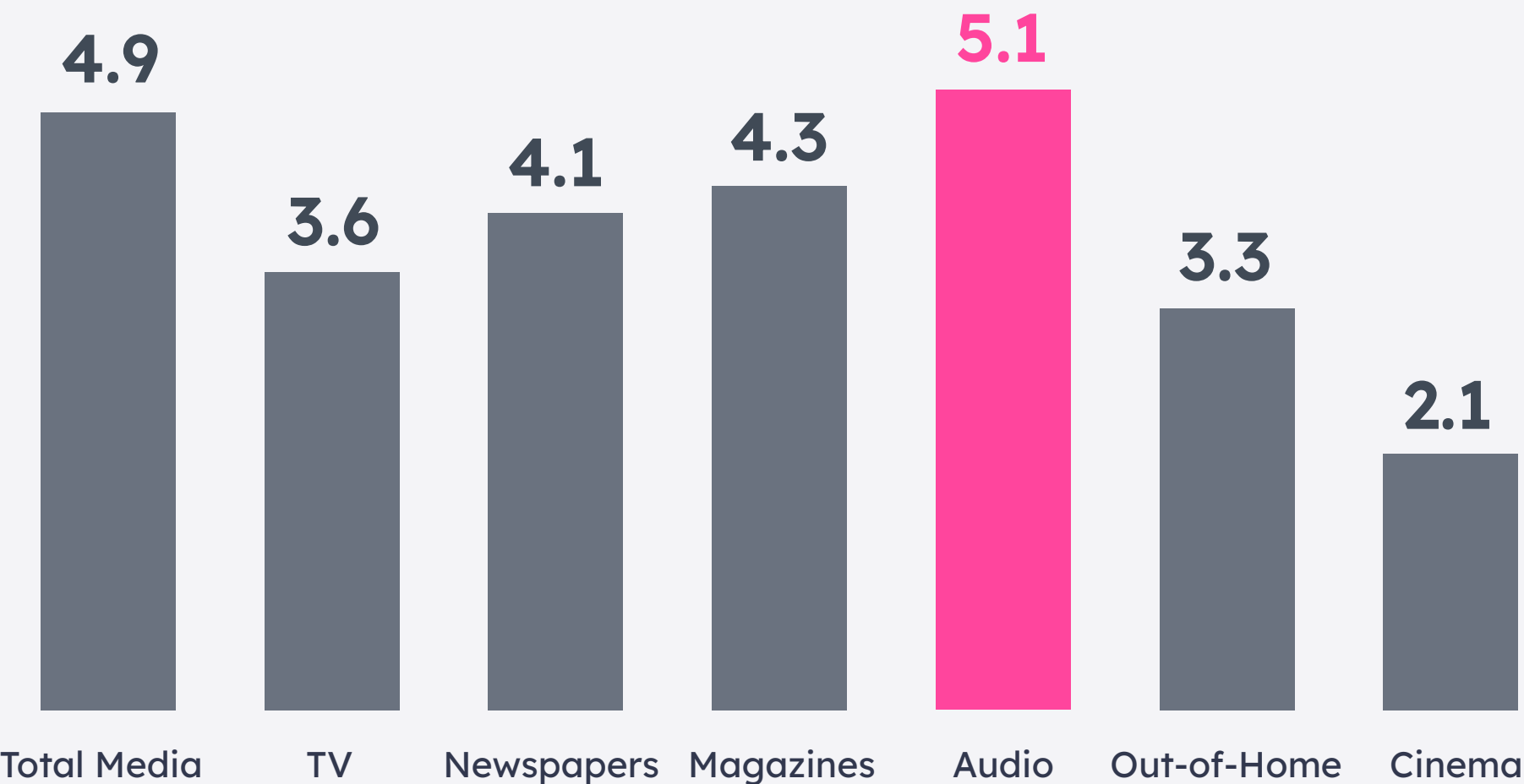
Audio advertising's contribution to total ROMI has increased in recent years

+11%

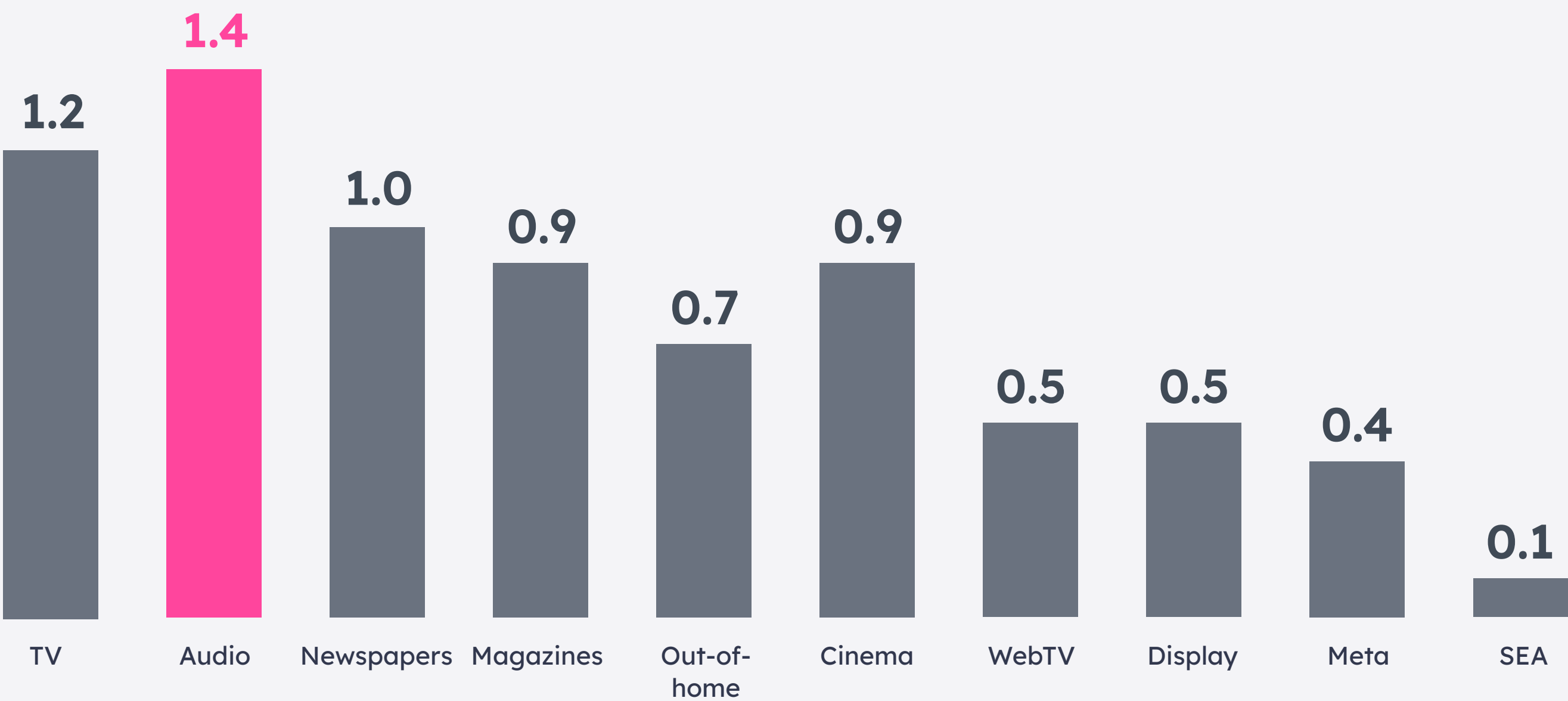
ROMI (Return on Marketing Investment) measures the return generated by marketing investments. ROMI indicates how much sales, profit or revenue have been generated for each euro invested in marketing.

Audio Delivers the Highest ROMI of All Offline Media and Has the Longest Lasting Effect

ROMI 2012–2023



Media Effectiveness Half-Life (Weeks)* 2020–2024



* Advertising effectiveness half-life refers to the period after which half of advertising’s impact on sales or website traffic still remains..
Source: Dagmar, August 2024, ROMI Database (more than 200 marketing mix models). ROMI is calculated as the incremental sales generated by marketing divided by marketing investment.

Audio advertising delivers above-average ROI

Radio and digital audio (podcasts, music streaming services and online radio) complement each other, strengthen campaign effectiveness and increase ROI.

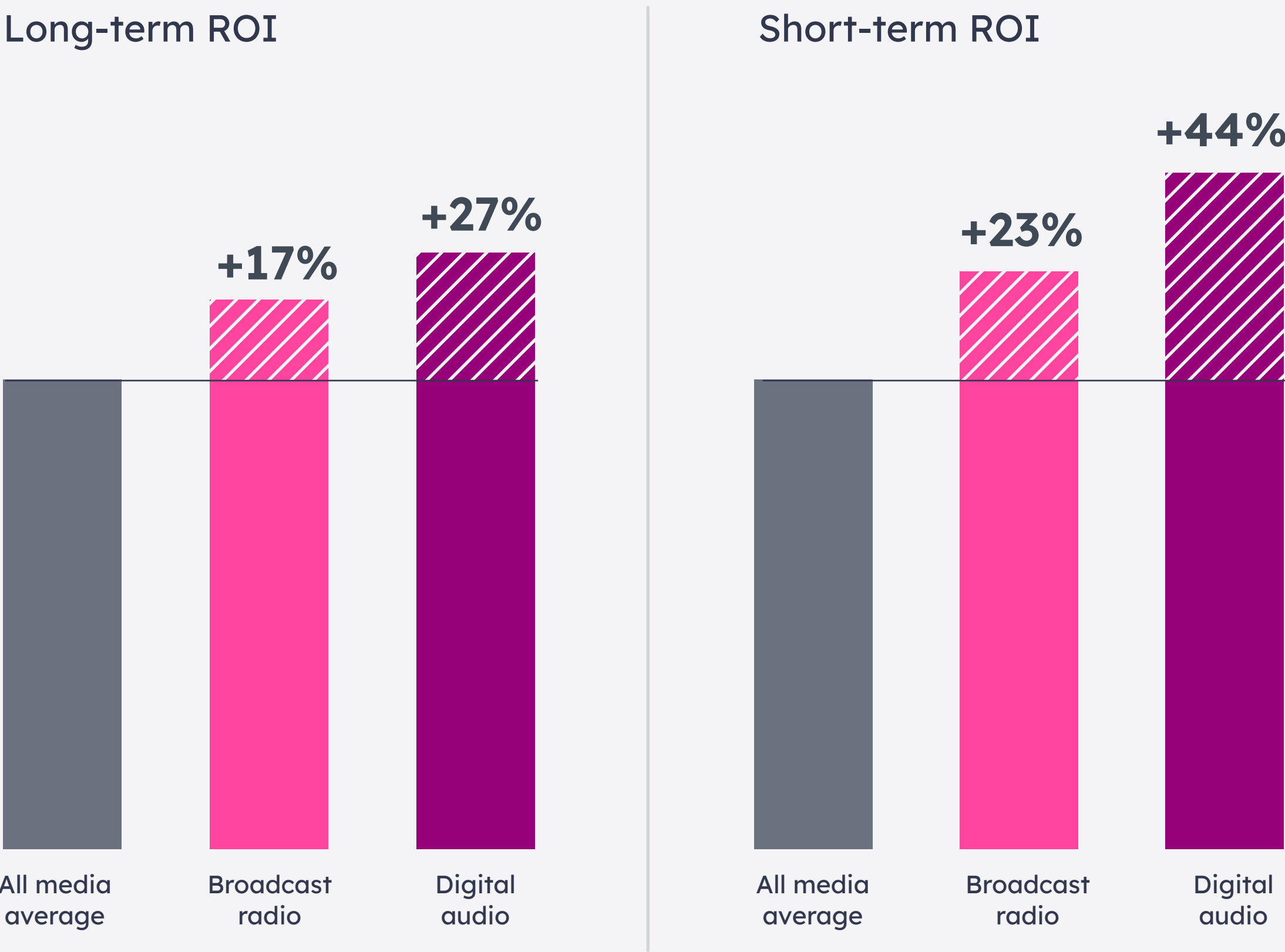
Multi-Platform Audio Delivers Higher ROI Than the Average Medium*

+32% higher short-term ROI
+21% higher long-term ROI

Both radio advertising and digital audio outperform the average return generated by other media channels when used on their own. Both audio channels also deliver a higher ROI than purely digital advertising platforms.

Increasing audio’s share of the media budget can improve campaign performance without additional investment. When up to 25% of the media budget is allocated to audio, overall campaign ROI can increase by as much as 9%.

Multi-platform audio clearly delivers a higher ROI than the average media channel.



Source: WPP Media & Radio Centre UK (2025), High Gain Audio. Radio Centre UK.
Available at: <https://www.radiocentre.org/our-research/high-gain-audio/>

Base: Multiplatform Audio dataset (7 campaigns) vs. Total PA2 dataset
Source: WPP Media

Radio enhances performance marketing

Radio has a clear amplifying effect on performance marketing. It increases website traffic, strengthens the impact of other media channels and improves overall marketing effectiveness.

Radio advertising:

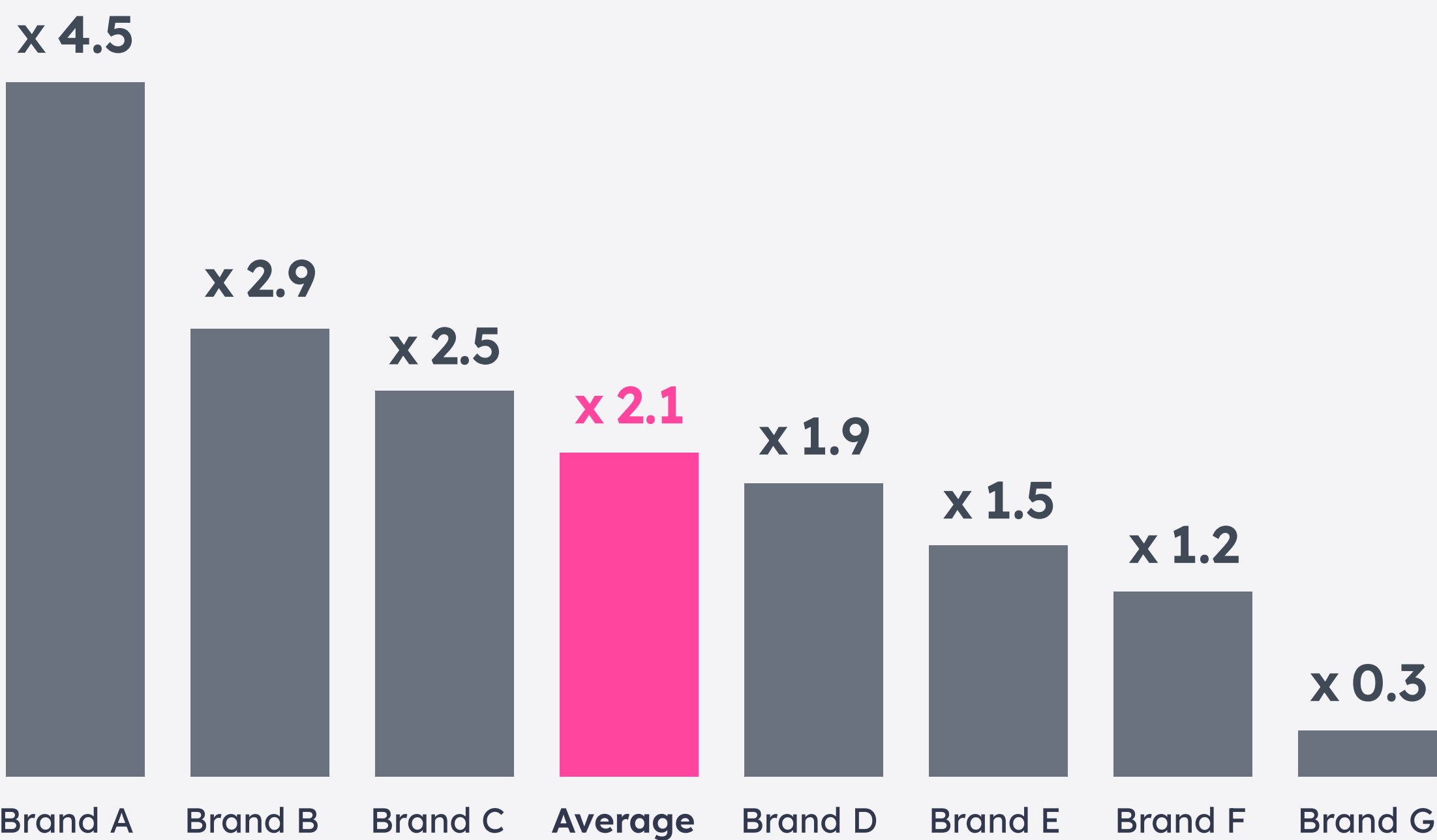
- increases organic search traffic, improves the effectiveness of paid search and boosts the response to paid social media advertising
- generates website sessions at an average cost efficiency 2.1 times higher than other demand generation media
- increases direct website traffic by an average of 43%
- creates long-term value for performance-driven brands as well

Increasing radio’s share of the media budget improves campaign effectiveness without requiring additional investment, even when radio accounts for more than 50% of the total media budget.

Radio generates website sessions at twice the cost efficiency
Radio cost efficiency index vs. all other demand generation media combined

Radio advertising increases direct website traffic by an average of

+43%

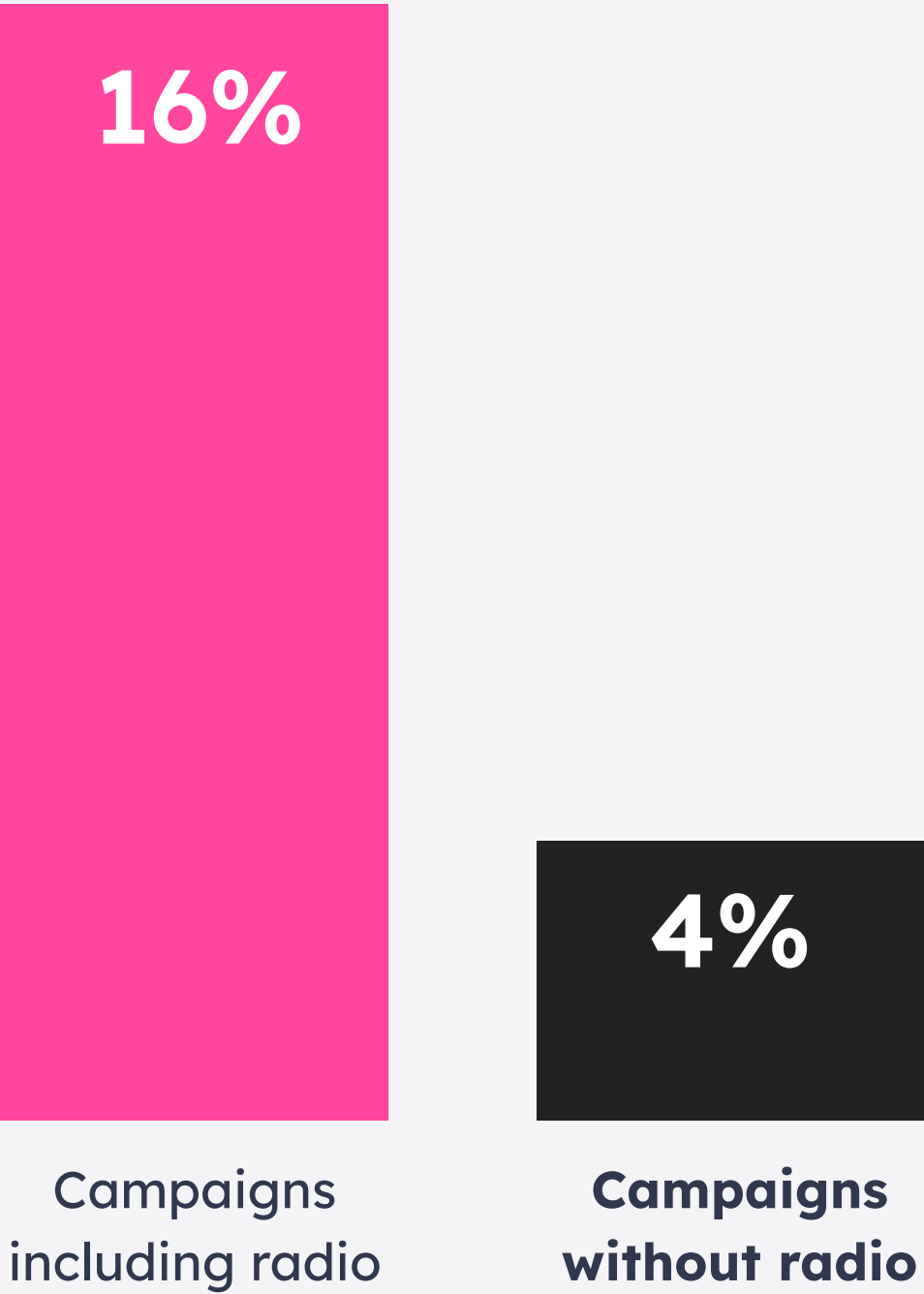


*Source: Results are based on a large-scale study analysing the impact of 7.2 billion multimedia exposures on 195 million website sessions.
<https://www.radiocentre.org/radio-the-performance-multiplier/>

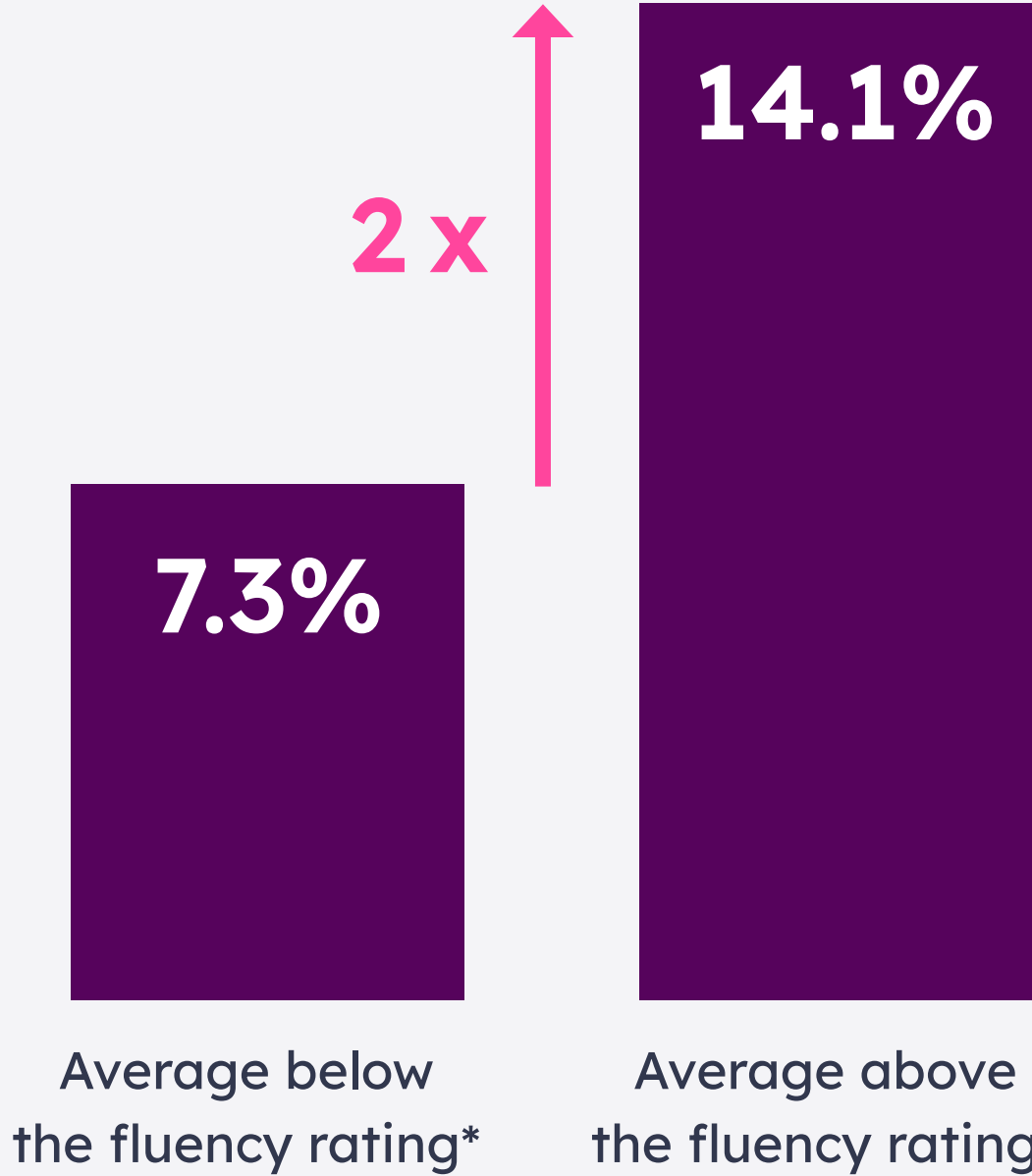
Base: Average results across individual campaign models (n=7).
Source: Radio: The Performance Multiplier, Colourtext, Google Analytics and Adobe Analytics

Radio builds brand trust

Including radio in campaigns increases brand trust



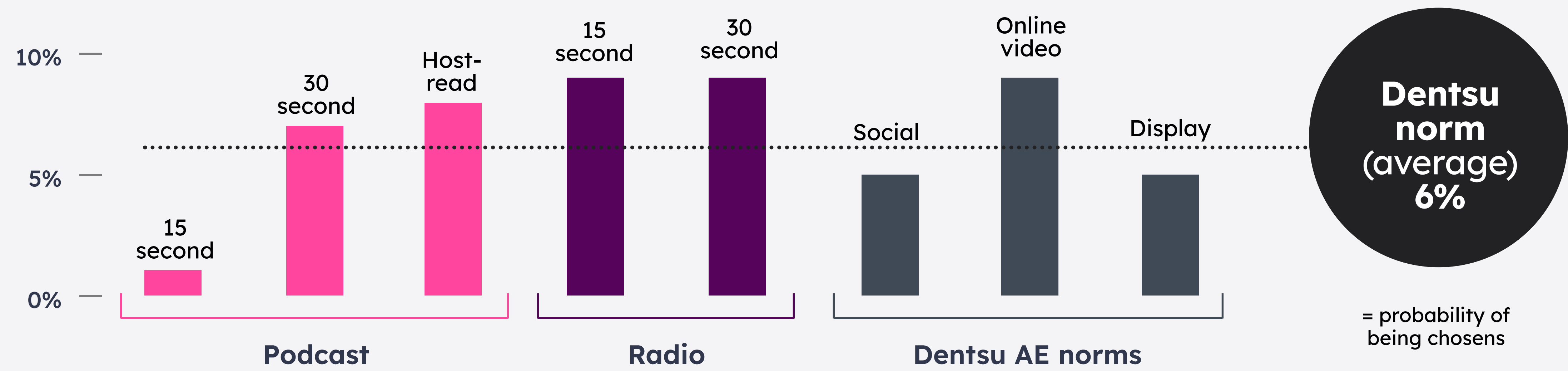
Well-branded radio advertising doubles advertising's impact on trust



Suomiräpin aamu, Suomiräp

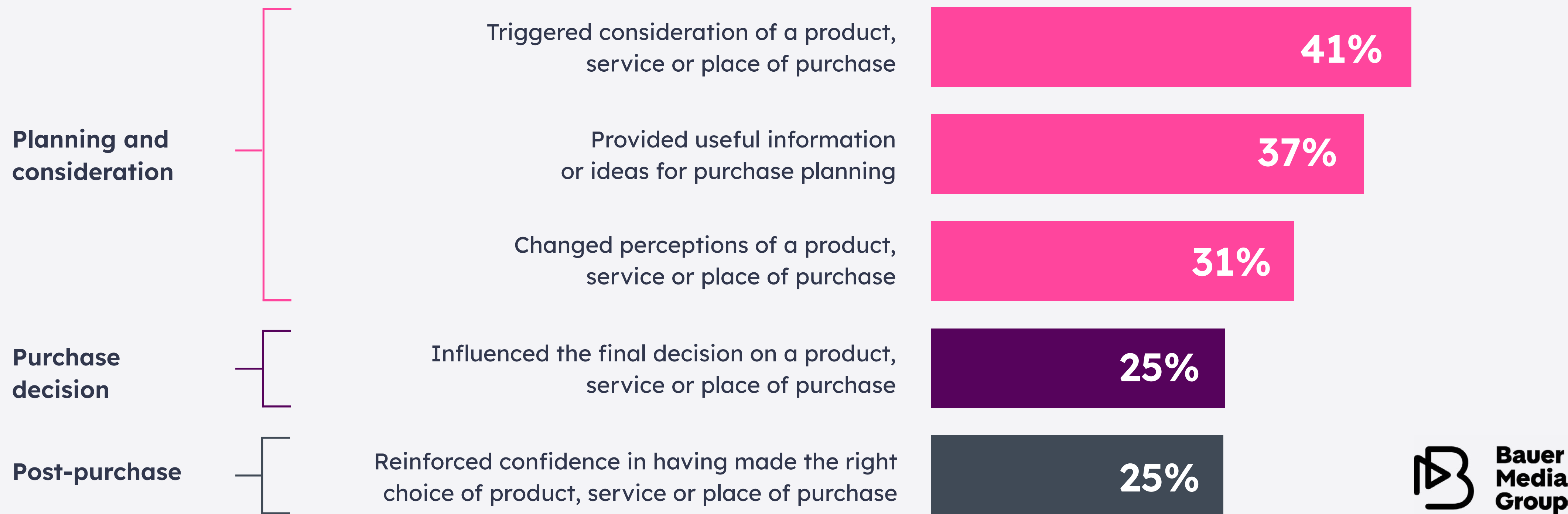
* System1's Fluency Rating measures how well a brand is recognised and linked to an advertisement.
Sources: Peter Field and the IPA Databank; System1 and Radiocentre. Analysis based on 55 campaigns and more than 50,000 UK respondents. Media contributions weighted by GRPs.

Radio and podcasts uplift brand choice



Audio advertising influences every stage of the purchase Journey

The impact of audio advertising heard on radio or podcasts throughout the purchase journey



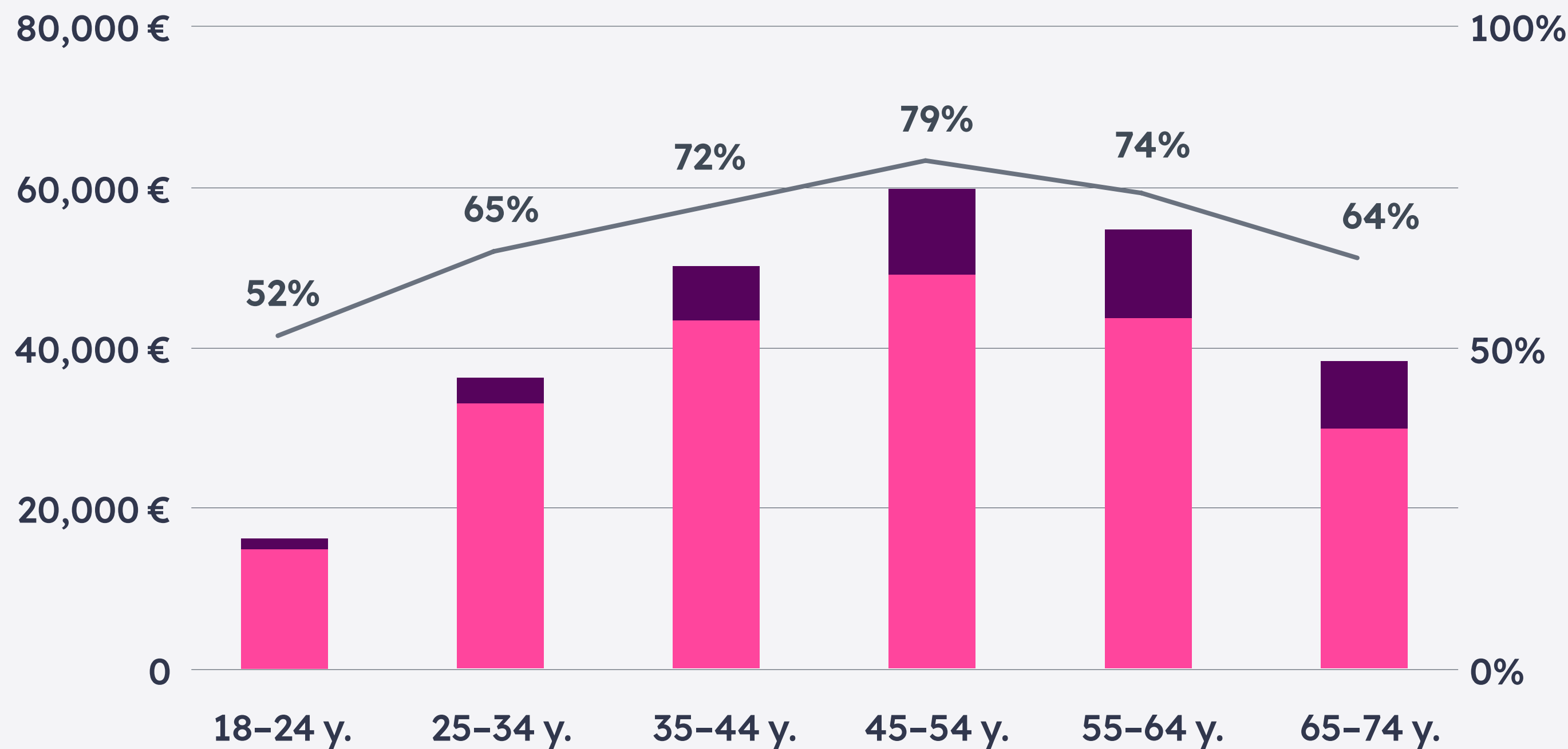
Source: Bauer Media, in collaboration with Kantar and Mall Voice, Audio Advertising Effectiveness Study 2024 (N=2,264).

3

Commercial radio reaches consumers of all ages



Commercial radio effectively reaches high-value consumer groups



Average Earned Income (€ per year)

Average Capital Income (€ per year)

Weekly Reach of Commercial Radio (%)

- According to the Finnish Tax Administration's income statistics, the highest income levels are found among Finns aged 35-64.
- While younger age groups have lower earned income, they are active consumers who are curious and willing to try new products and services.
- Commercial radio effectively reaches all of these valuable target groups every week.

15–24-year-olds

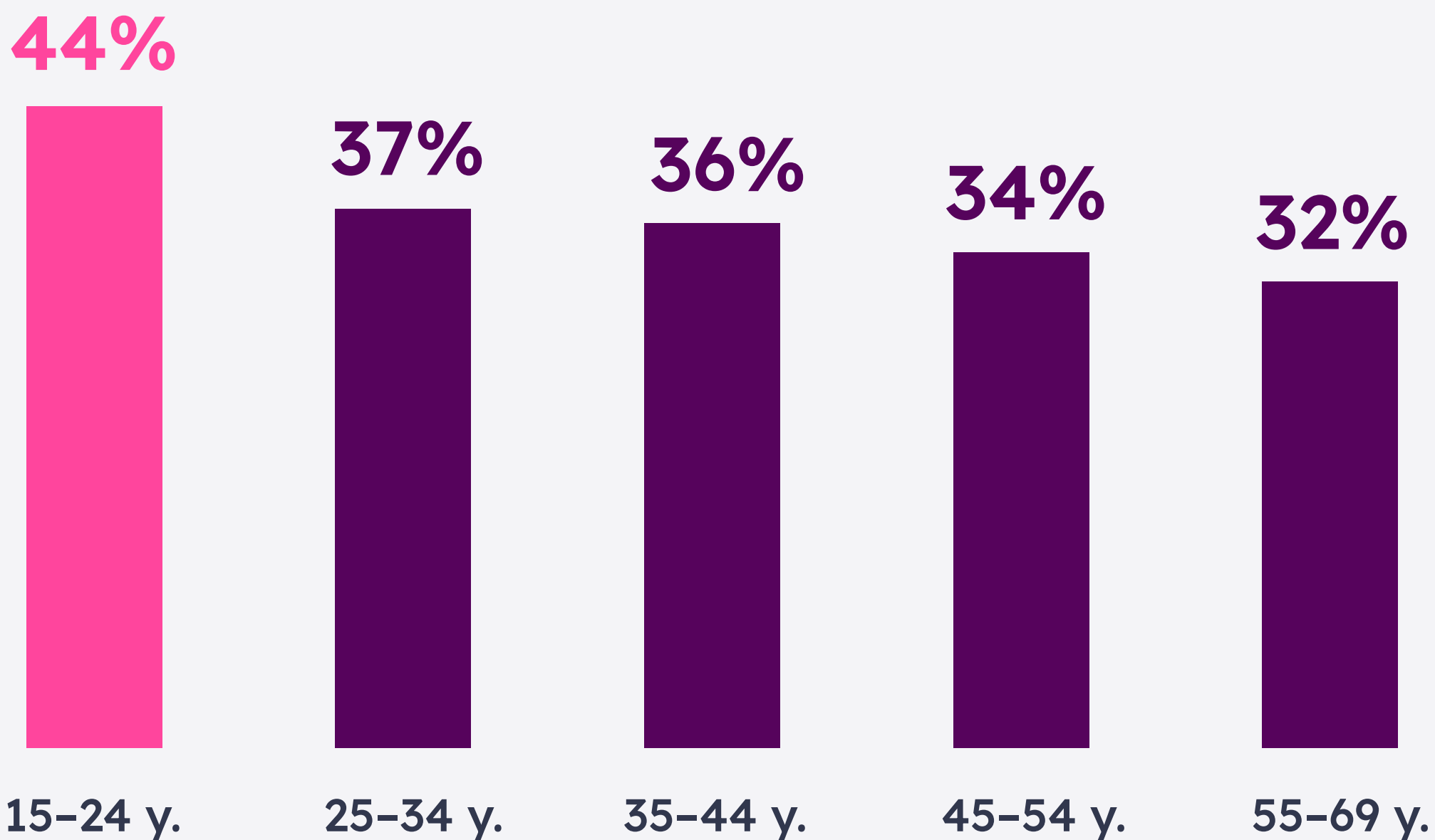
Young adults enjoy shopping and are the most experimental consumers. They spend time carefully comparing brands, and for them a product’s appearance and design are just as important as its quality.*

Facts about audio consumption among 9–24-year-olds

- More than half a million young people (615,000) listen to commercial radio every week.
- Commercial radio reaches 57% of this audience weekly, while podcasts and catch-up radio content reach 27%.
- On average, 9–24-year-olds listen to commercial radio for 172 minutes per week and to podcasts for 93 minutes per week.

Young Audiences Have the Highest Recall of Radio Advertising

Among 15–24-year-olds, average advertising recall is 44%, compared with an overall average of 36% across all respondents.



Sources: Finnpanel Oy, National Radio Survey 2025. RadioMedia Advertising Database / Norstat 2018–2025, commercial radio listeners aged 15–69.
* Source: Kantar Media Mind Consumer Survey 2024. A significant proportion of the target group generally agrees fully or somewhat with the statement, with a statistically significant or strong correlation confirmed (Chi-square significance test).

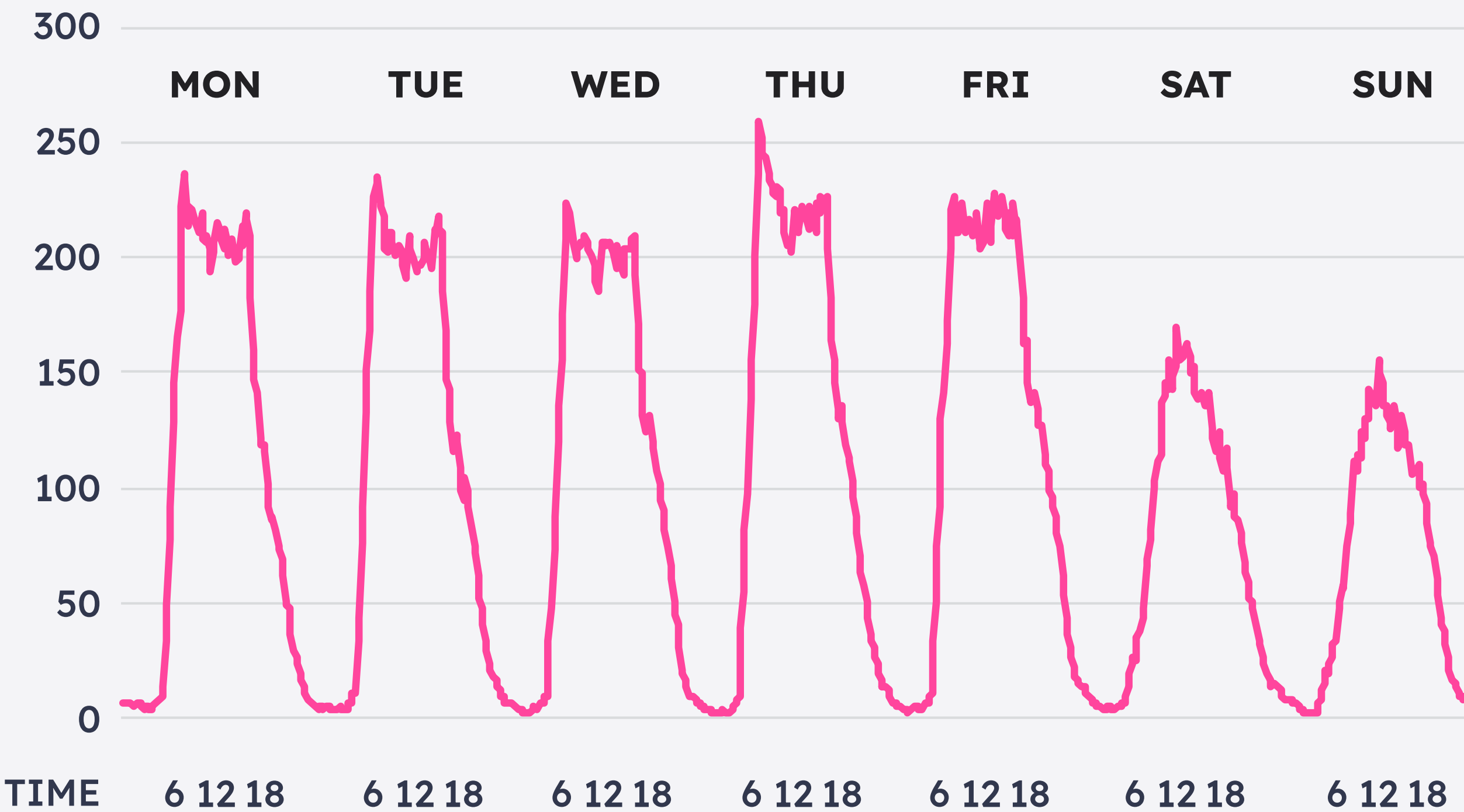
25–54-year-olds

A high-value and diverse consumer segment that values both quality and good deals. Online shopping helps make their everyday lives easier.*

Facts about audio consumption among 25–54-year-olds

- More than 900,000 adults aged 25–54 listen to commercial radio on an average weekday.
- Commercial radio reaches 72% of this audience every week, while podcasts and catch-up radio content reach 31%.
- Radio is a valuable companion during the busiest years of life. It provides a curated stream of content without requiring listeners to make choices. Familiar presenters create a sense of comfort, while news, current affairs and music are delivered effortlessly. Radio’s ease of use and element of surprise make it the perfect companion for a busy everyday life.

Commercial Radio Quarter-Hour Reach Among 25–54-Year-Olds



Source: Finnpanel Oy, National Radio Survey 2025.
* Source: Kantar Media Mind Consumer Survey 2024. A significant proportion of the target group generally agrees fully or somewhat with the statement, with a statistically significant or strong correlation confirmed (Chi-square significance test).

55–64-year-olds

As consumers, they are loyal to products and brands they trust, value domestic products and services, and are willing to pay for quality.*

Facts about audio consumption among 55–64-year-olds

- Commercial radio reaches 75% of this audience every week, while podcasts* reach 13%.

Attitudes towards life, consumption and advertising among 55–64-year-olds**

- This audience enjoys a strong income level, further strengthened by relatively low debt levels.
- They want to enjoy life and are willing to invest in themselves.
- As consumers, 55–64-year-olds are selective in their purchasing decisions, yet willing to spend significantly on things that genuinely interest them.
- They often feel that advertising is not aimed at them, even though they appreciate receiving information about products, services and special offers that they are happy to take advantage of.



Source: Finnpanel Oy, National Radio Survey 2025.
* Source: Kantar Media Mind Consumer Survey 2024. A significant proportion of the target group generally agrees fully or somewhat with the statement, with a statistically significant or strong correlation confirmed (Chi-square significance test).
** Source: 55+ Consumer Study, IRO Research 2024. Sample size 2,002; respondents aged 55–64 (n=714)

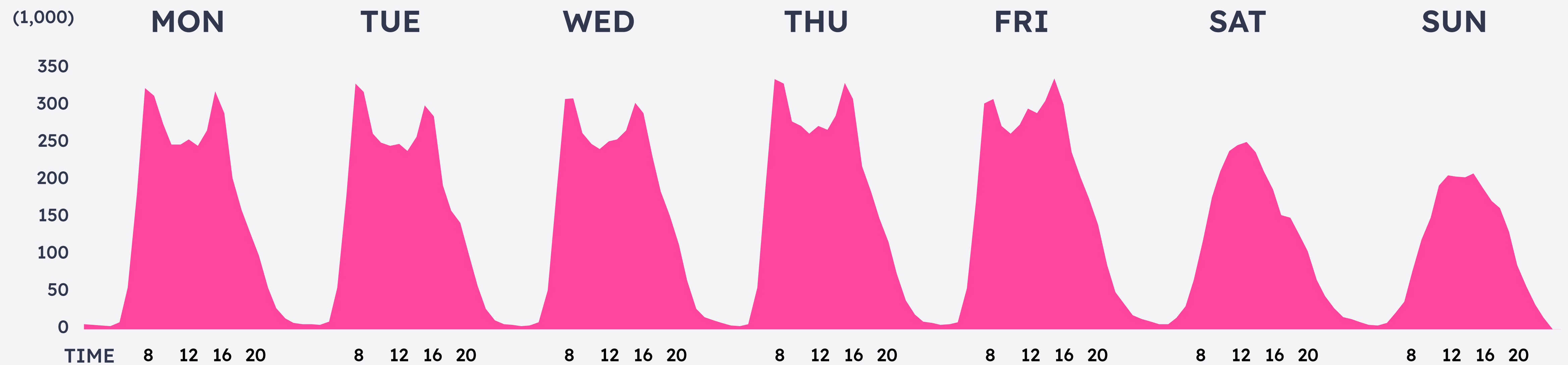
4

Radio is part of consumers' daily lives



Radio is part of every moment of the day

The hourly reach of commercial radio on different days of the week in the age group 25–54



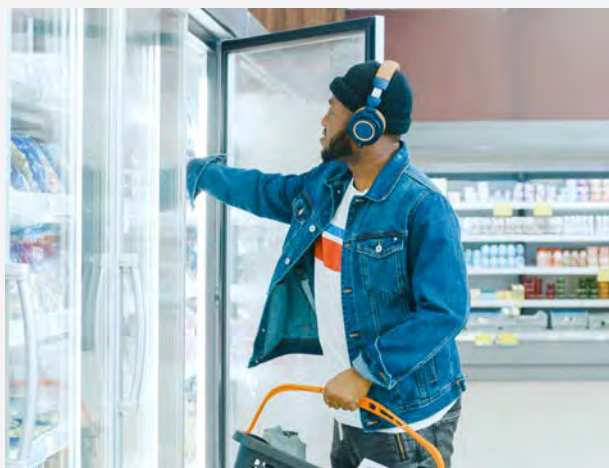
MON 7.30



TUE 18.00



WED 15.00



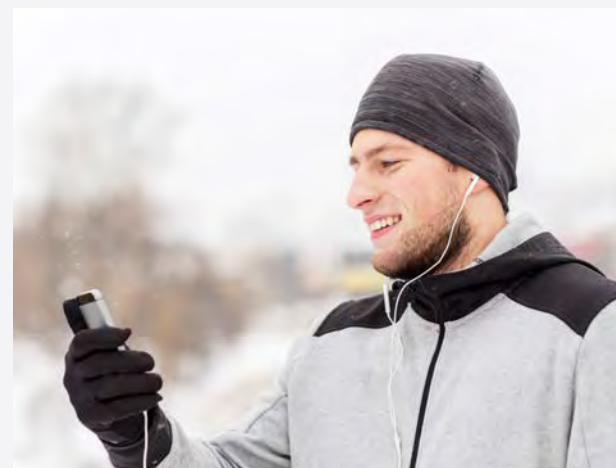
THU 16.30



FRI 20.00



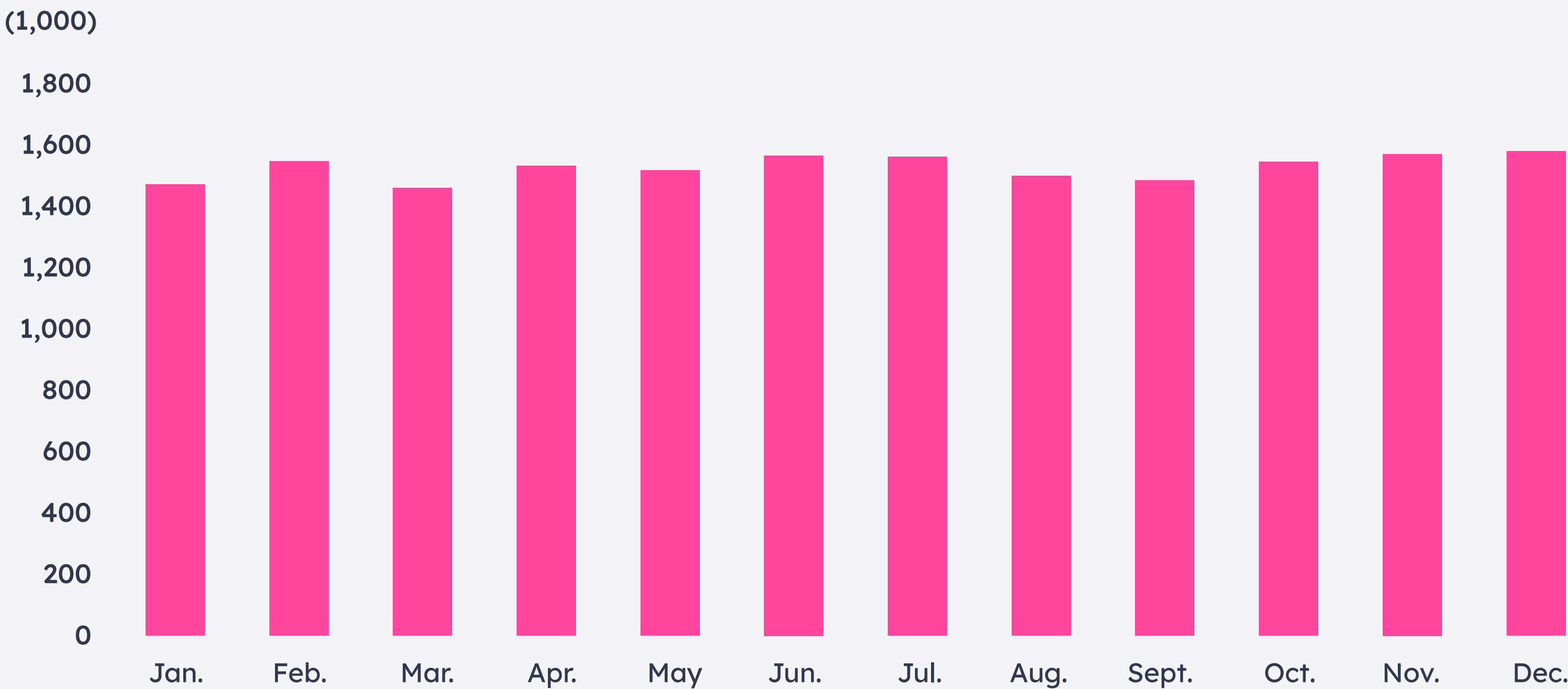
SAT 11.00



SUN 10.00

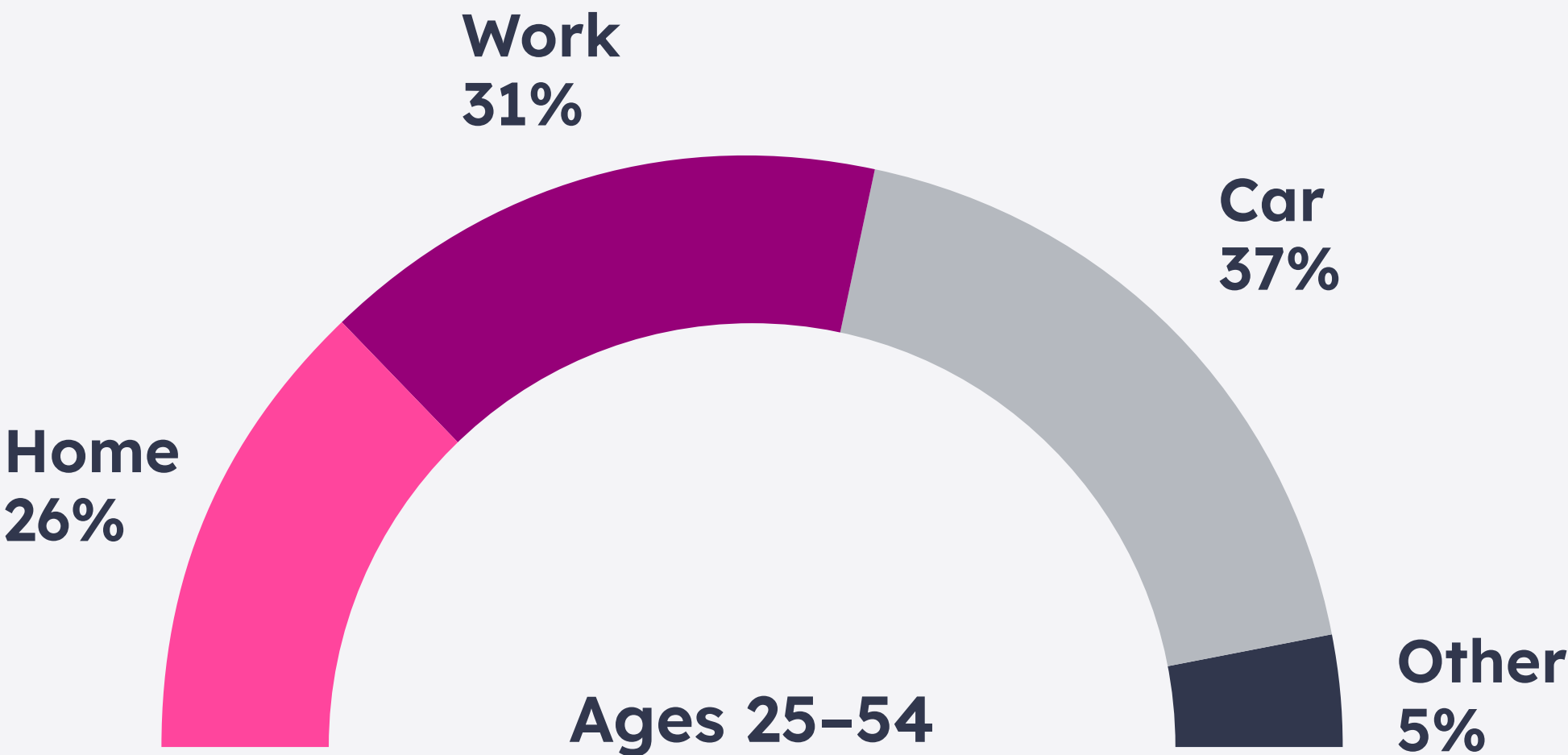
Commercial radio maintains strong reach throughout the year, Including summer

Weekly reach of commercial radio in Finland by day of the week (Ages 25–54)



Aito Iskelmän Aamu, Aito Iskelmä

Radio is listened to everywhere – even while doing other activities



74%

consume audio alongside their daily activities, allowing brands to connect with audiences when they are attentive, engaged and most receptive to brand messages.



Lähde: Audacy Rituals Survey conducted by Alter Agents, July 2022

Distribution of Commercial Radio Listening by Location Calculated from total listening minutes across the full year.
Source: Finnpanel Oy, National Radio Survey 2025.

Live radio and on-demand audio complement each other – for both audiences and advertisers

Live radio

provides companionship, entertainment and the familiar voices of favourite stations. At the same time, it keeps listeners informed and connected to the wider world.

On-demand music

is typically chosen when listeners want to influence or enhance their mood.

Podcasts

are consumed for entertainment and to pass the time. They are also a way to learn more about topics of interest and gain deeper understanding.

Radio
+
Digital Audio
=
Powerful
Marketing
Channel

▶ See page 18

5

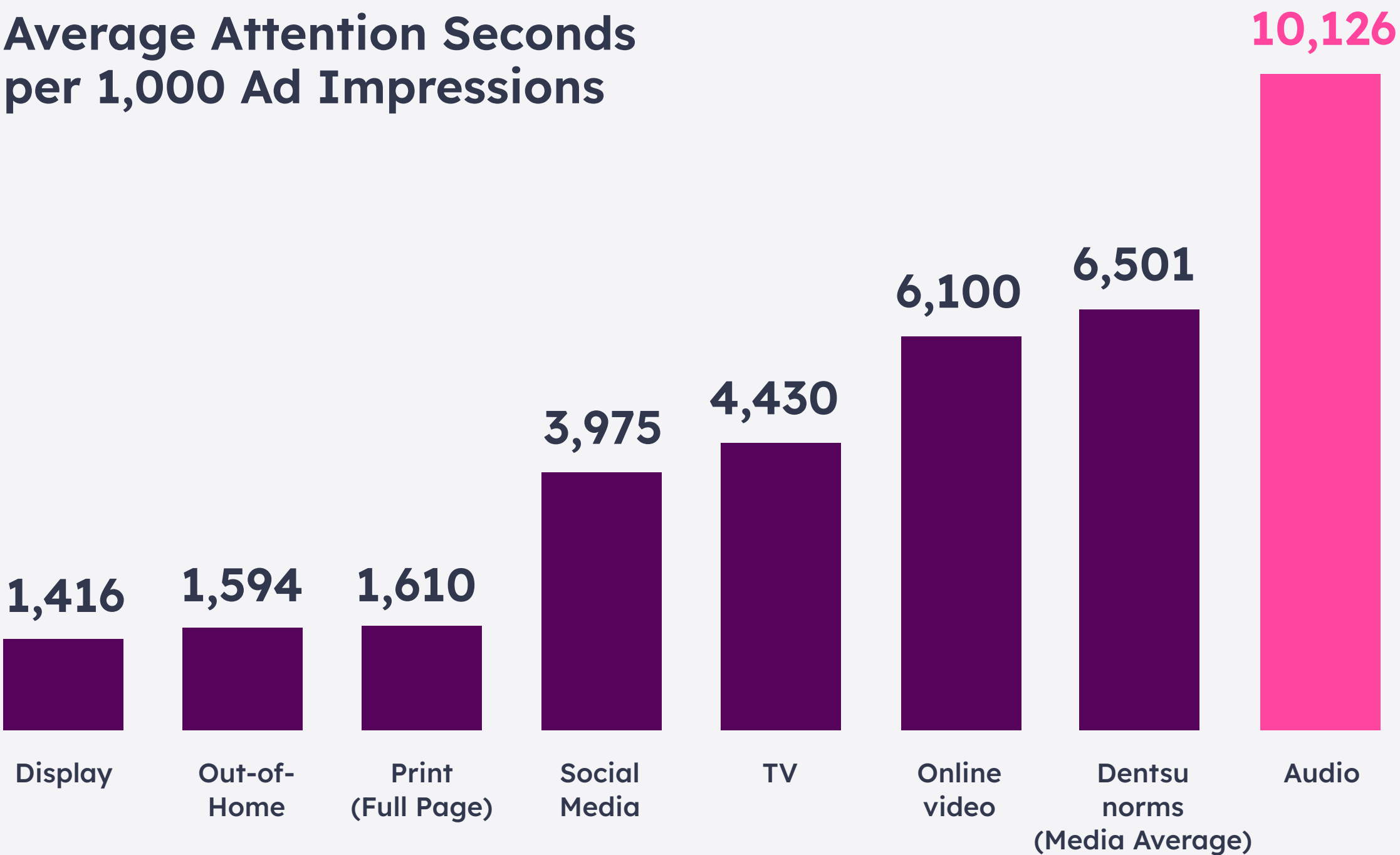
Audio advertising is much more than spots

The sound has a personal impact,
it appeals to the emotions and creates action.



Audio advertising delivers unmatched attention

Average Attention Seconds per 1,000 Ad Impressions



Attention in advertising measures how much attention consumers pay to advertising across different media environments. In other words, did the advertising actually get noticed?

Audio advertising generates 56% more attention seconds than the average across all media.

In many other media channels, a large proportion of advertising goes unnoticed, meaning that a significant share of advertising investment is wasted.

Advertising effectiveness can be improved by allocating budgets to media environments where advertising attracts higher levels of attention.

A growing body of research shows that attention metrics are a stronger predictor of business outcomes than exposure alone.

Attention measurement can also help reduce the carbon footprint of advertising. Better-targeted campaigns reduce media waste, delivering both economic and environmental benefits

Source: Dentsu, TV: TVision / Lumen UK TV Panel. YouTube, In-stream Video, Facebook Feed, Display Banners: Lumen Digital Panels.
Print: Lumen Omnibus. Out-of-Home: AM4DOOH Project. Instagram, Facebook Watch and TikTok: Lumen studies (weighted to align with passive panel measurement).

Sound influences effectively:

Audio advertising evokes personal experiences and images

That is why it is so impressive.

1 Captures attention, increases brand recall

Attention is essential to make advertising effective.

Audio advertising achieves 56% higher attention value than average advertising. Additionally, audio advertising increases brand recall 8% more effectively than other media.

Consistent use of voice across all media platforms effectively strengthens brand recognition and recall.

2 Reaches and impacts

A single sound triggers tens of thousands of personal memories in its listeners. The sound of a sizzling sauna stove evokes familiar sensations and the ambiance of one’s own sauna with its scents and surroundings. A visual ad cannot achieve the same effect because a picture chosen by someone else is never personal. The awakening of personal imagery makes audio advertising more impactful than visual advertising. → Personal imagery influences emotions and 90% of purchasing decisions are based on emotion.

3 Provides tone for advertising

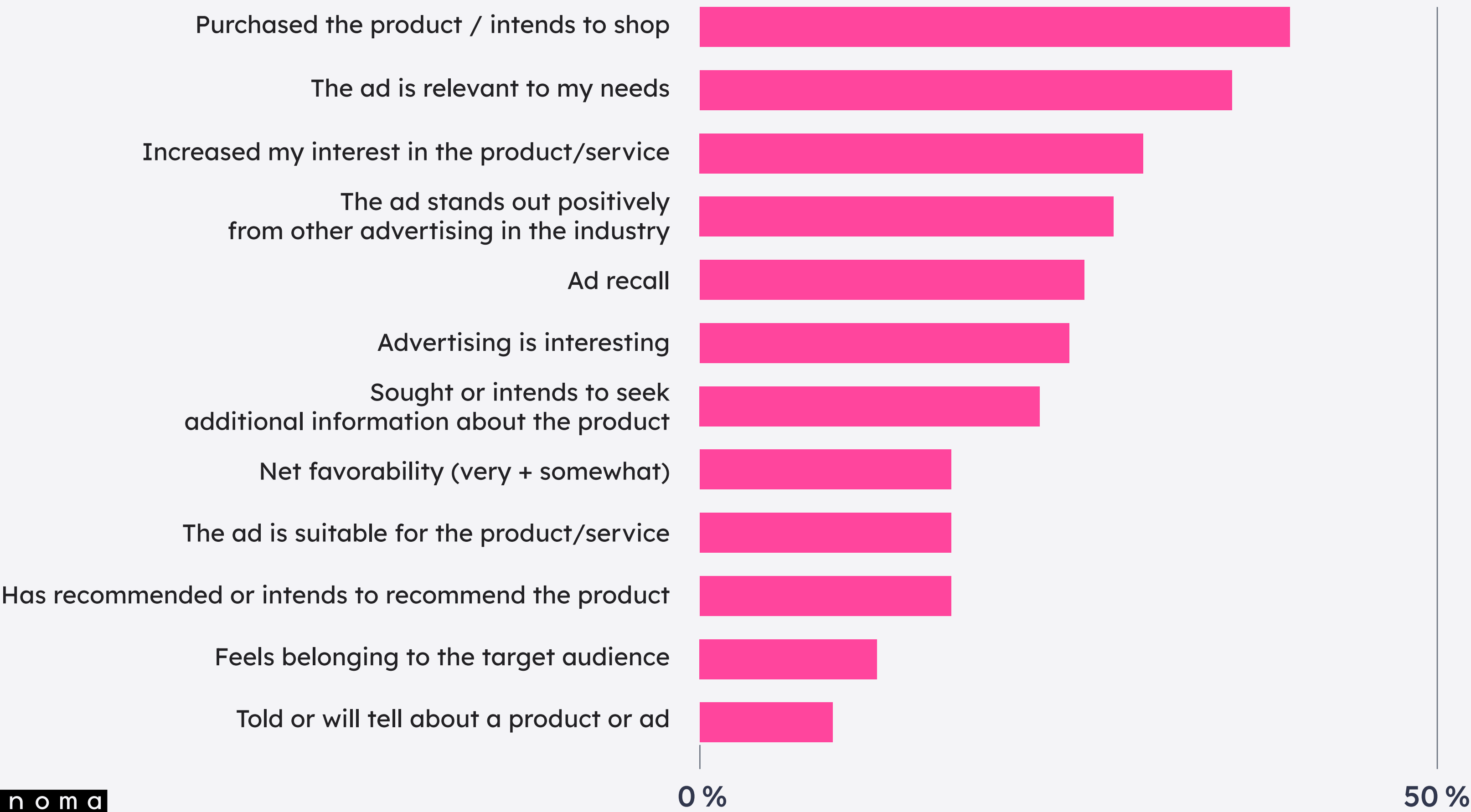
Sound adds emotion to all advertising, including visual. For example, when you see the Silja Line logo, a melody likely starts playing in your mind. Similarly, you can hear what the Puulo ad "Tuutko hakee? En. Tuun." sounds like, even if you only see the text.*

Source: Attention Economy Study 2023, Dentsu/Lumen, and Professor, Neuroscientist Minna Huotilainen, University of Helsinki.
*examples of Finnish brands

Many forms of audio advertising

Audio can be used to address in various ways

Promo vs spot only



Spot advertising is an effective and fast way to get the message across to a wide audience.

Radio offers versatile specialized solutions, including promotions, program collaborations, podcast partnerships, and dedicated podcast programs

Through specialized solutions, the brand engages the target audience more personally by strongly associating with favorite channels, programs, and personalities

Digital specialized solutions enable targeting even niche audiences.

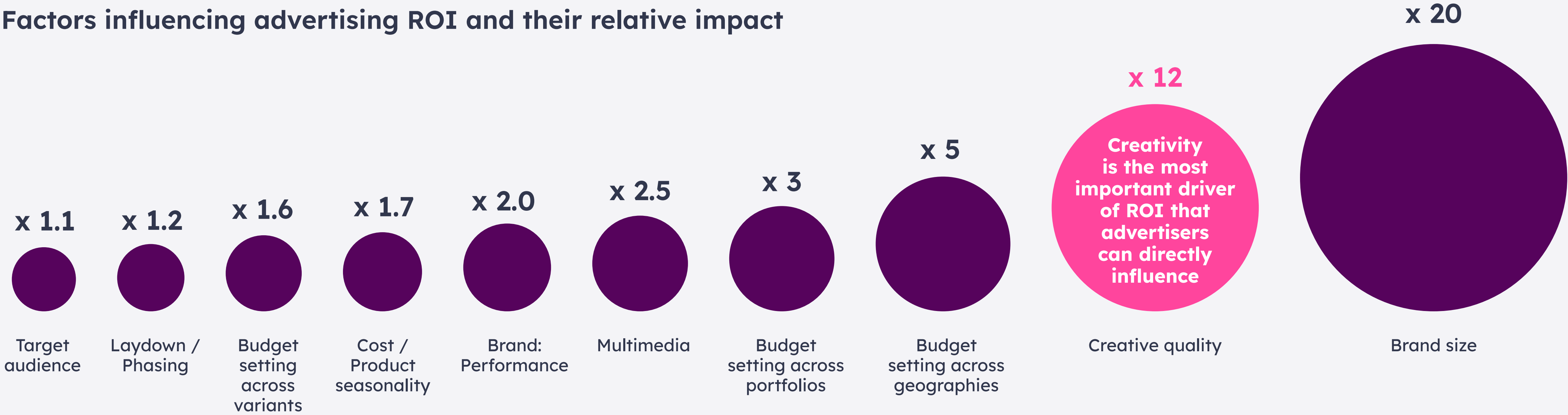
Specialized solutions significantly increase campaign awareness, brand differentiation, and appeal, as well as drive action.

Creativity plays a critical role in advertising effectiveness

Advertising effectiveness is driven by:
50% creativity
50% media investment*

The most effective radio campaigns combine broad weekly reach with strong, distinctive audio brand assets that are used consistently across multiple media channels and over time.**

Factors influencing advertising ROI and their relative impact



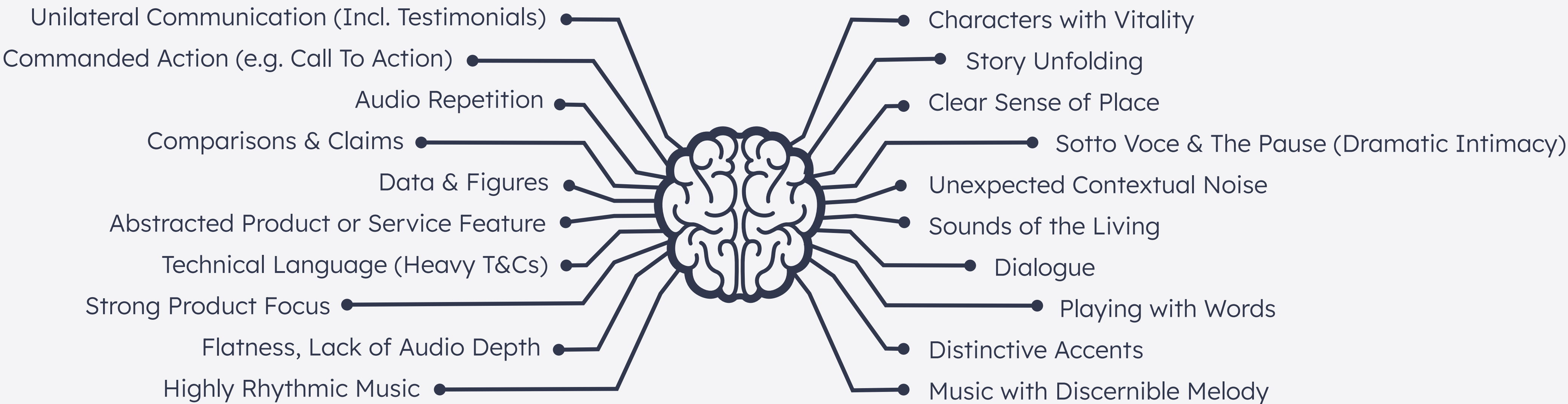
* Kantar and Accelero, The Drivers of Profitability (2023). ** Radiocentre UK, Radio: The Performance Multiplier (2025).

Strategic or tactical, short-term or long-term goal:

The impact of creative solution on the effectiveness of audio advertising

Elements that influence the left hemisphere of the brain increases **purchase intentions**, and the impact is typically shorter-term.

Elements that influence the right hemisphere of the brain **build brand image** over the long term.



Source: Listen Up! System1 & RadioCentre 2023, based on RadioCentre’s and IPA’s databases, System1’s advertising effectiveness measurement, and Orlando Wood’s theory on the effects of advertising elements on different brain regions.

Better Results with Distinctive Audio Branding

The Four Cs of a Successful Audio Strategy • By Ralph Van Dijk, Eardrum

1 Codes – Sonic Assets and Audio Logos
In today's fragmented media landscape, a brand's sonic identity acts as the glue that connects every brand interaction. TikTok's sonic branding, for example, demonstrates how a distinctive audio identity can help build a global brand.

2 Consistency
In radio, where visual cues are absent, consistency in sonic branding is critical. Successful brands develop a distinctive and enduring way of communicating with their audiences, making them instantly recognisable over time.

3 Consolidation
Radio gives brands the opportunity to dominate their category through sound. By investing strategically and consistently in radio, brands can stand out and be heard clearly above the competition.

4 Creativity
Listeners decide within seconds whether an advertisement is worth their attention. The golden rule of radio advertising is to make the listener part of the experience by creating space for imagination and inviting them into the story.

Purchasing radio advertising



Radio advertising
can be bought
directly from
radio companies
or through
media agencies

- Radio company or media agency professionals will **help you in selecting the correct channels and defining the right reach and repetition level.**
- The listener volumes from the National Radio Survey will be part of the purchasing. Radio companies and **media agencies use electronic systems to calculate a radio campaign's listeners and other key figures**, such as ad prices.
- When planning a campaign, **it is important to understand the role of the radio** and define the reach and repetition levels for the radio campaign, for instance, as well as a total budget that is realistic for the targets.
- One of radio advertising's unique advantages is the **ability to schedule commercials at specific times of day with precision down to a 15-minute window.** Premium placement options are also available, allowing advertisers to air commercials at key moments, such as at the top of the hour or between the news and weather updates.
- It is possible to **buy target group campaigns** from national radio companies from the target groups defined by the radio company.
- Both local broadcasters and national radio networks offer advertisers the opportunity to target campaigns regionally.
- Radio companies provide **programme cooperation, promotions and other special solutions** in growing your brand and activating listeners.
- **Radio advertising can be purchased also directly for digital platforms,** such as Supla or Rayo.

6

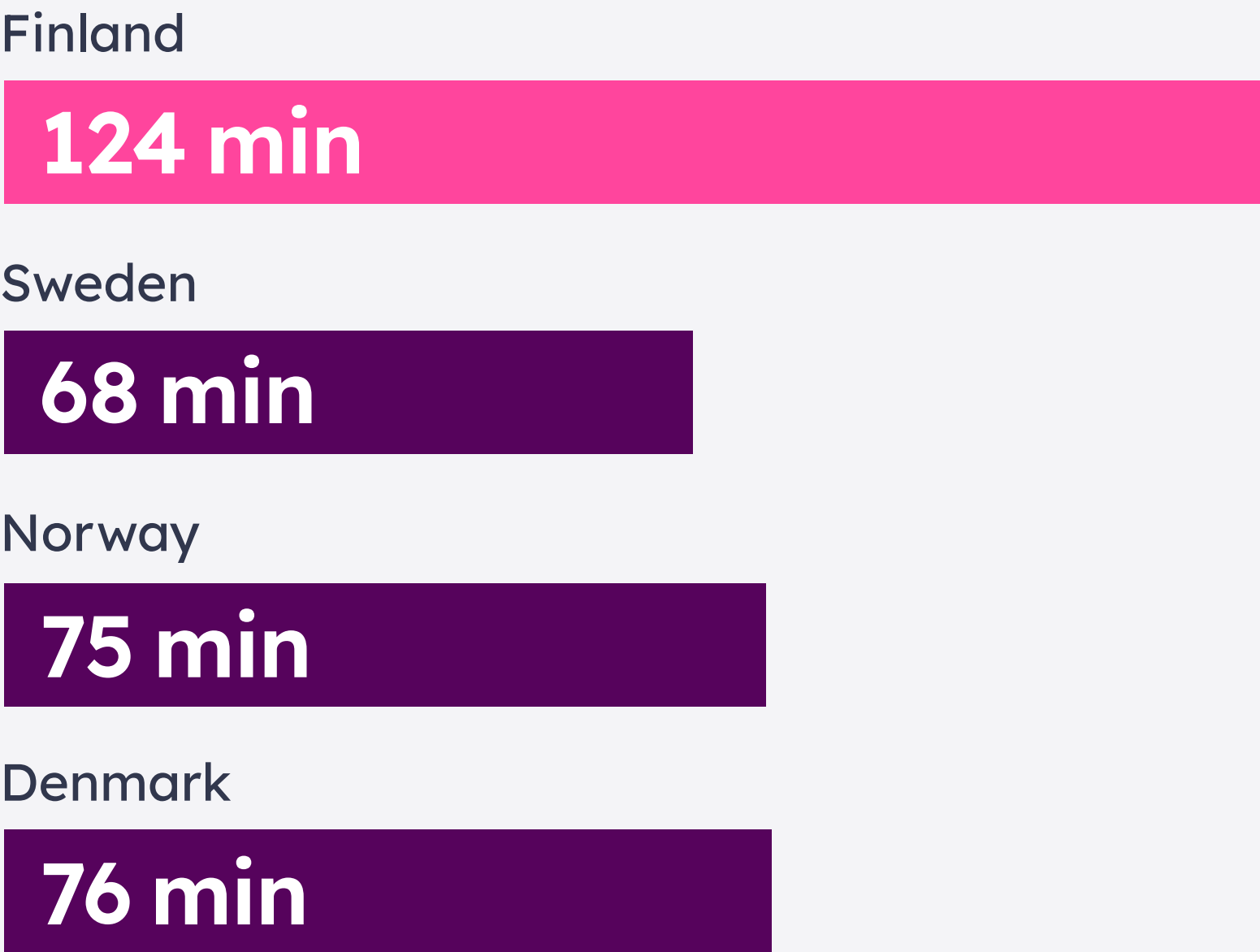
Radio in Europe



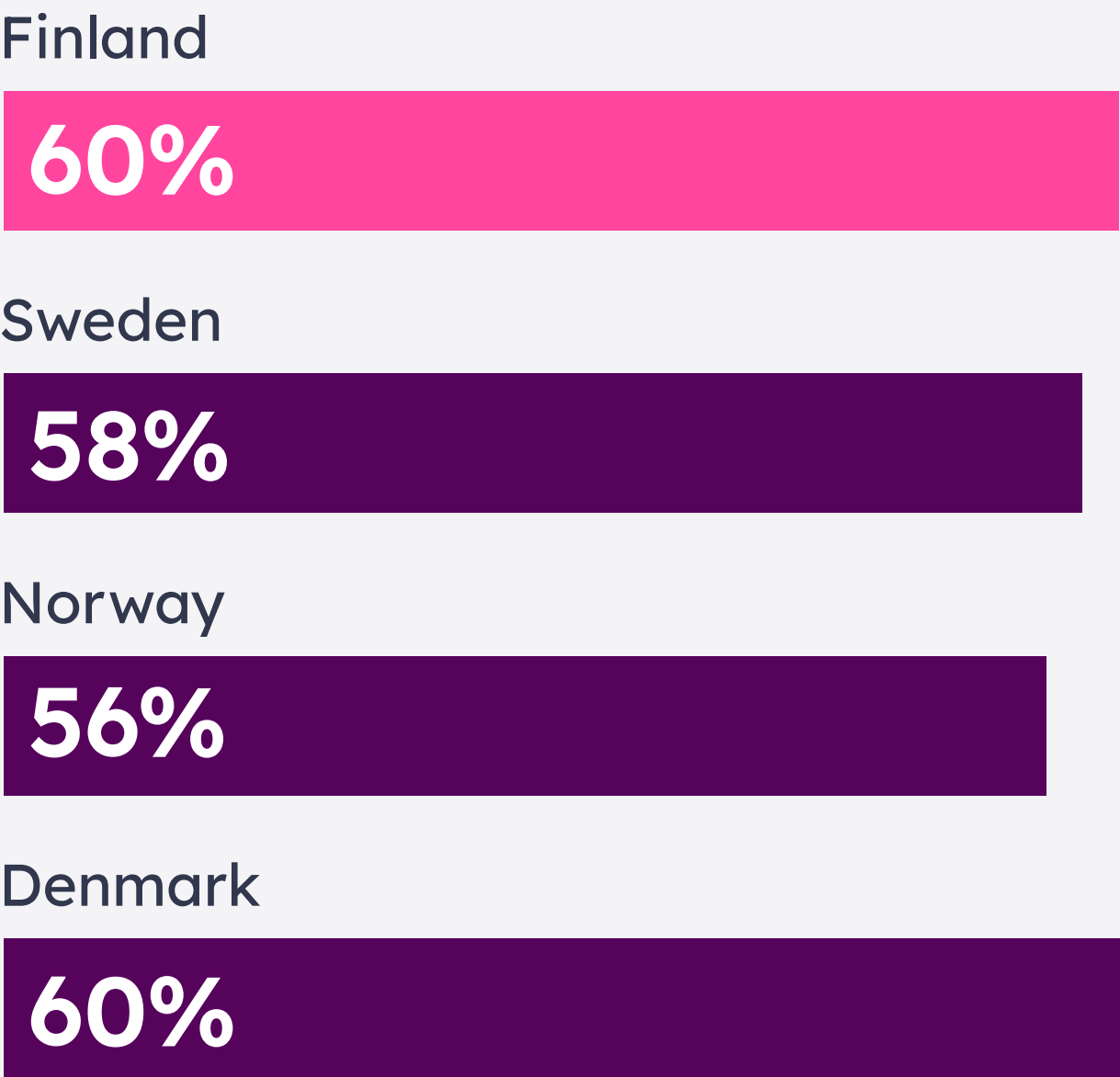
Tampereen Kiakkoradion Pelipäivä, Tampereen Kiakkoradio

Radio listening is higher in Finland than in other Nordic countries

Daily radio listening minutes in the Nordic countries



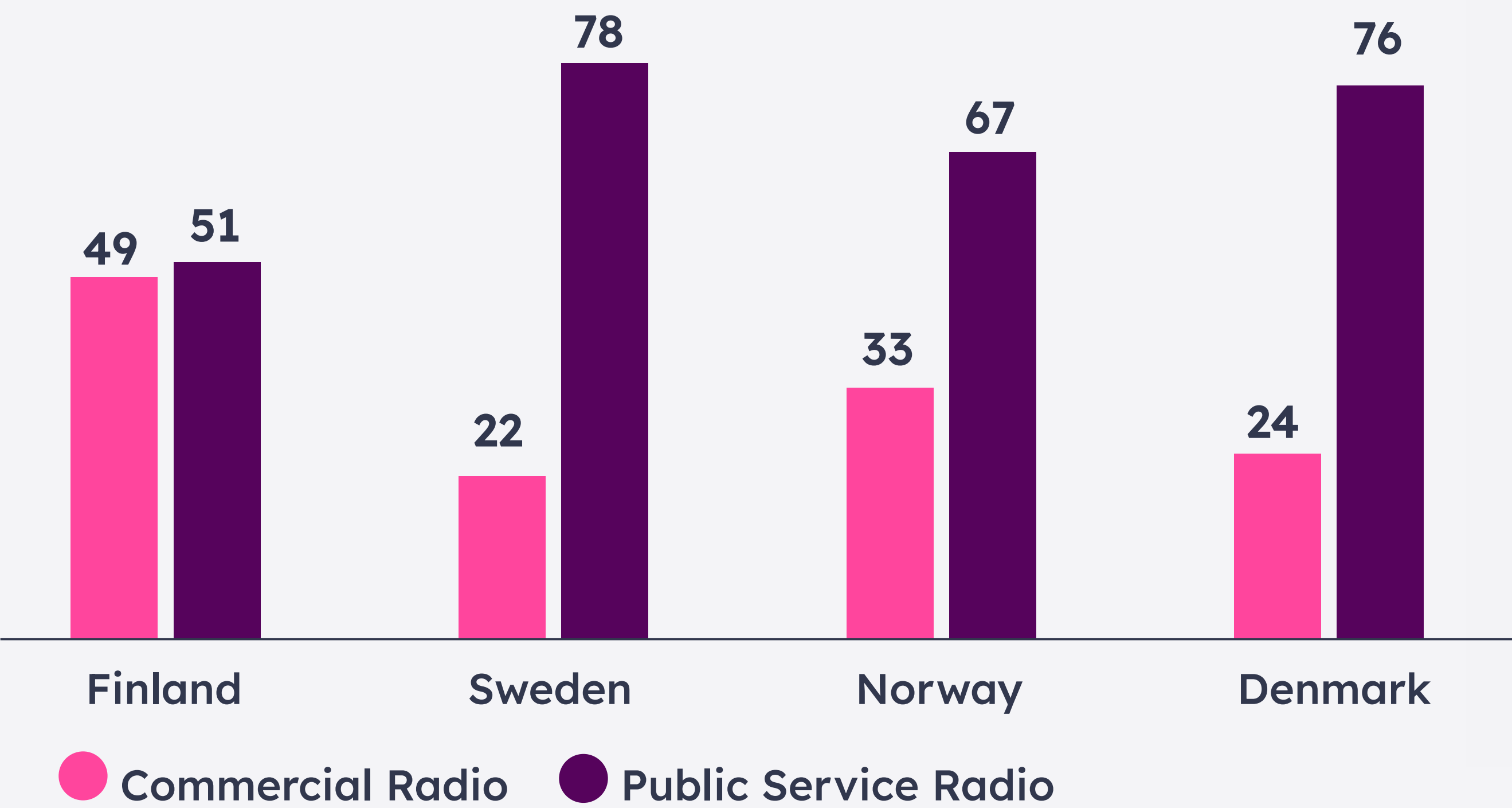
Radio reaches a similar proportion of the population daily across the Nordic countries



Sources: 2025 Finnpanel (Finland), Kantar (Denmark), Nielsen Media Research (Norway, Q4 2025), Kantar Sifo (Sweden).
Note: Different methodologies and target groups are used in each country's audience measurement studies. As a result, the figures are not fully comparable across countries.

Commercial radio is stronger in Finland than in other Nordic Countries

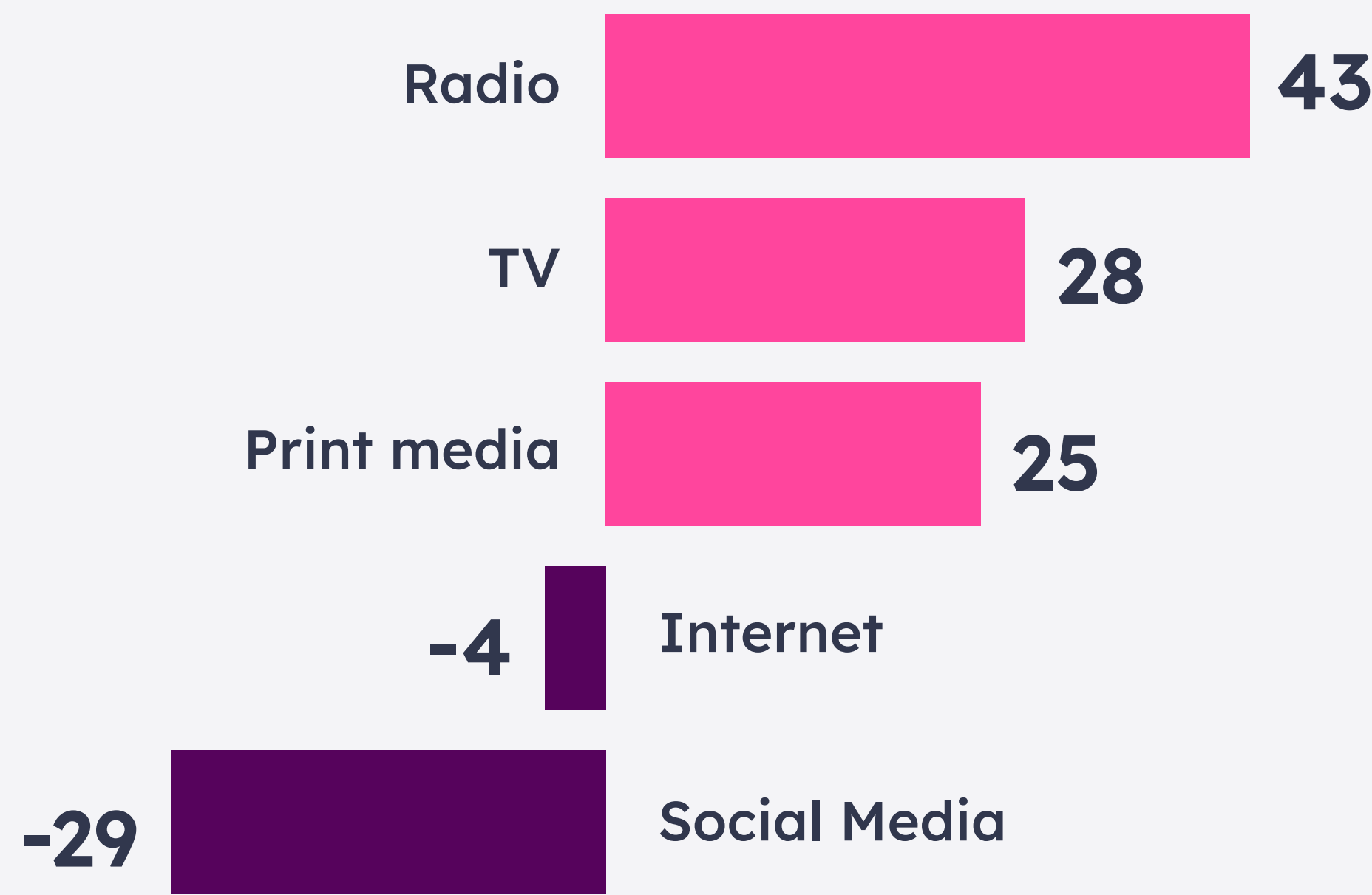
Listening Share (%) 2025



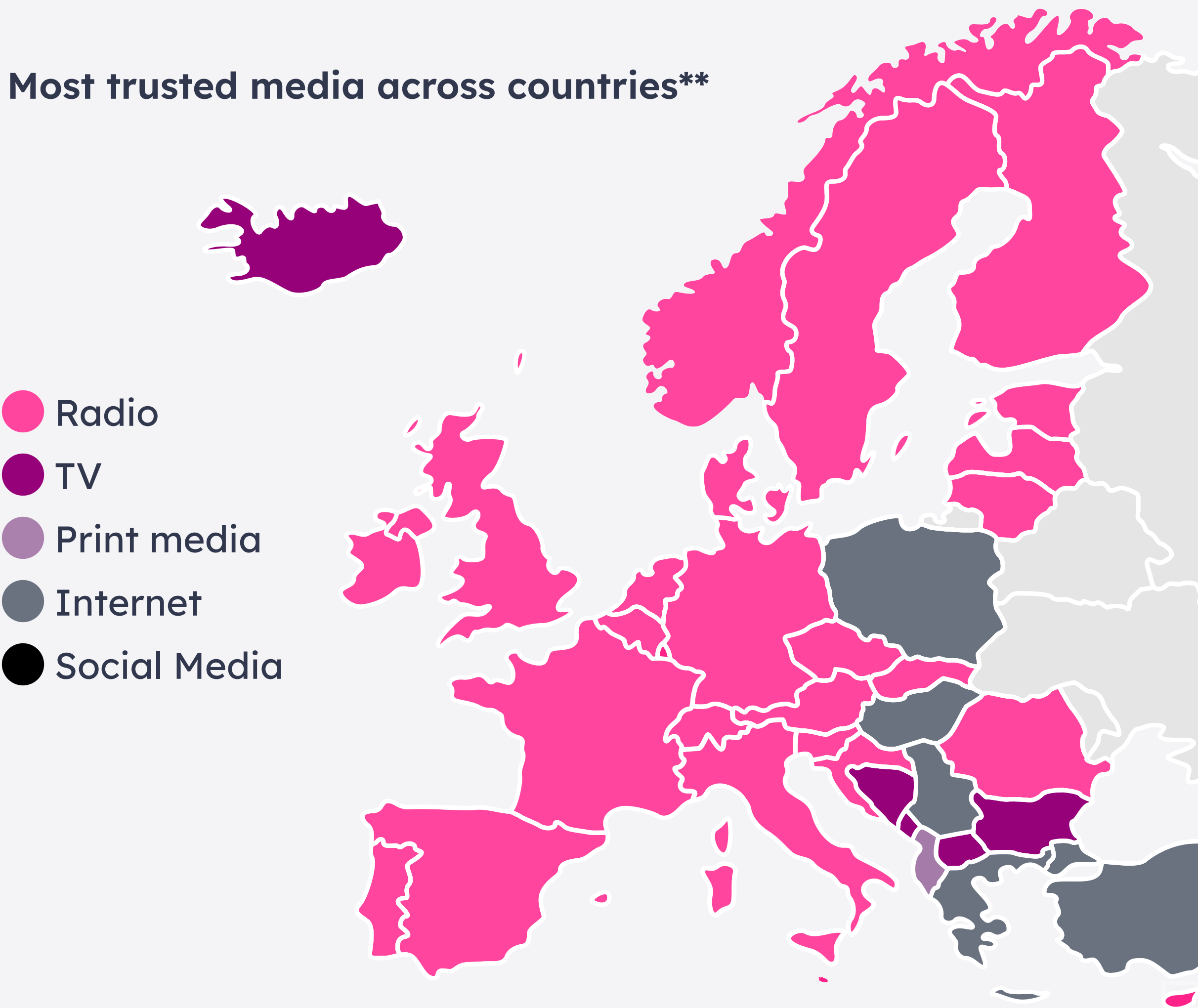
Sources: Finnpanel (Finland), Kantar (Denmark), Nielsen Media Research (Norway, Q4 2025), Kantar Sifo (Sweden).
Note: The audience measurements in each country are based on different methodologies and target groups. Therefore, the results are not fully comparable across markets.

Radio is a trusted medium

Radio is the most trusted medium in Europe*



Most trusted media across countries**

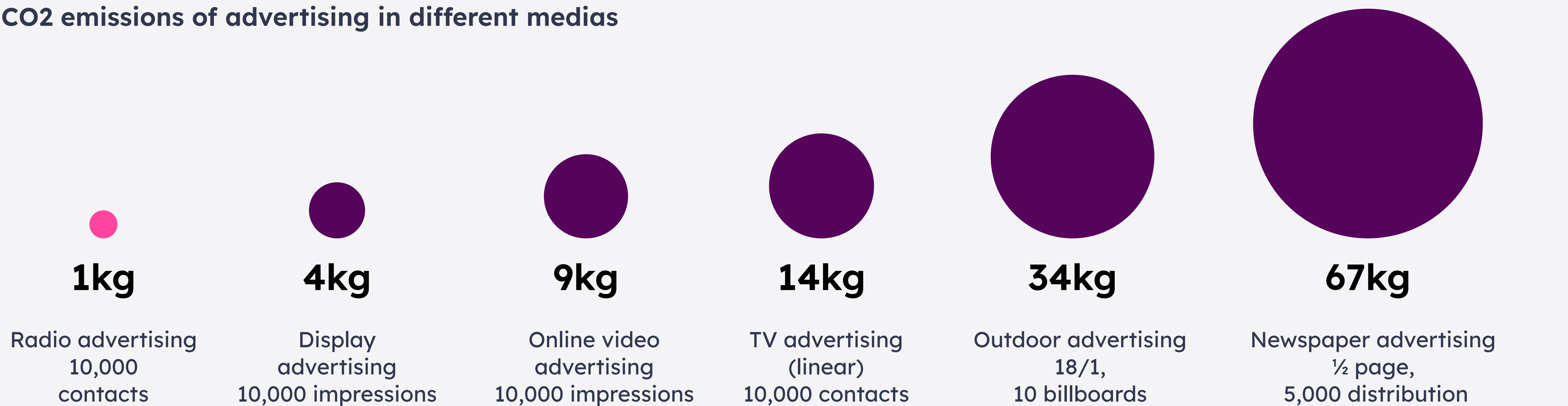


Sources: *EBU Media Intelligence Service 2025, **EBU Media Intelligence Service 2022

On an airwave of sustainability

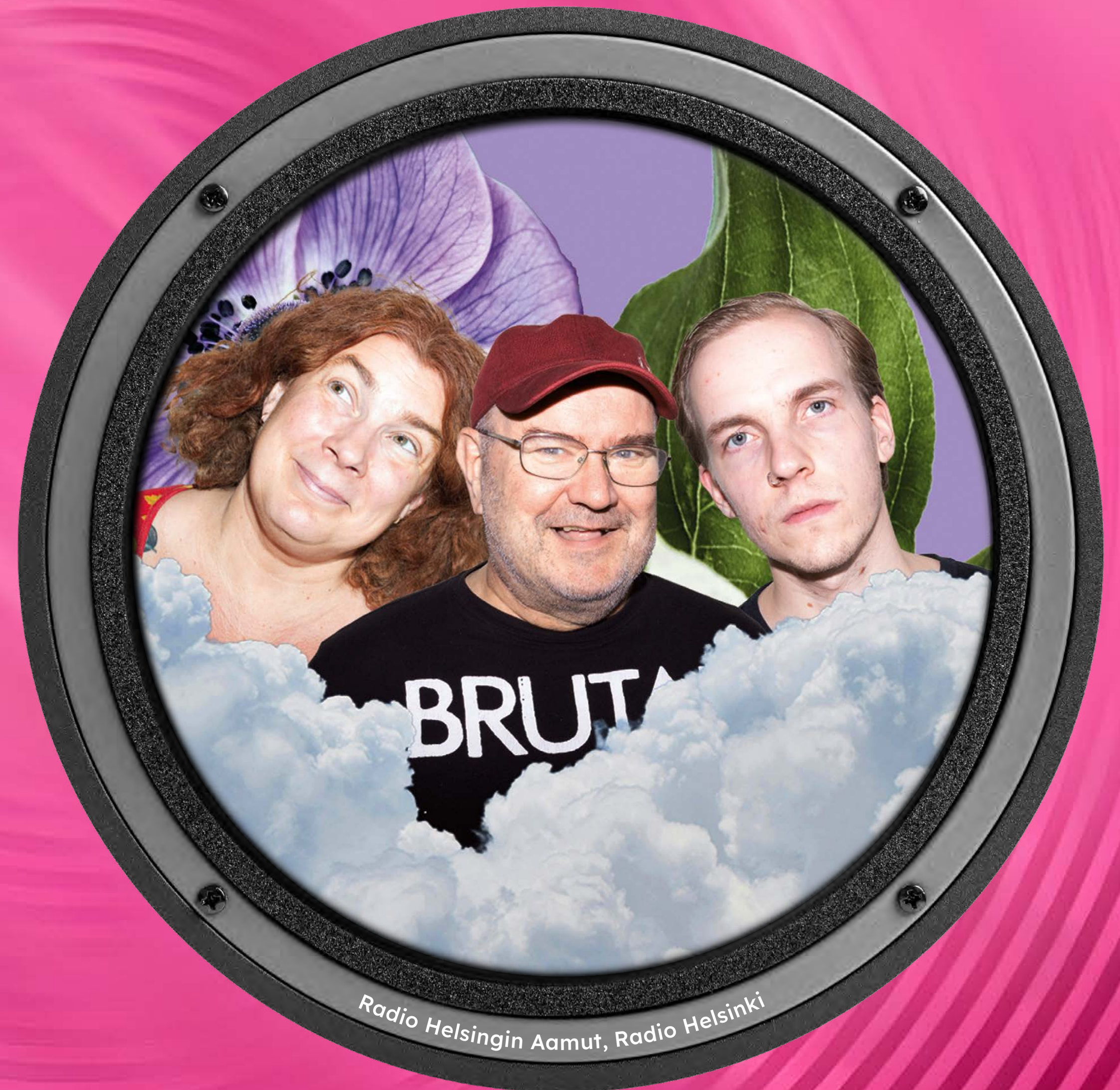
Radio is the most sustainable media format in the world, with radio campaigns having the smallest carbon footprint.

CO2 emissions of advertising in different medias

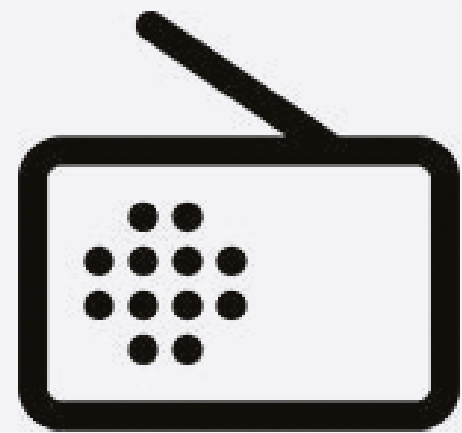


How are CO₂ emissions calculated? Read more at <https://www.mediaplus.com/en/landingpages/green-grp1.html>
Source: Green GRP, Germany

7 National Radio Survey



We receive reliable information on radio listening every day of the year



18,000 Finns

Every Thursday of the year, approximately 400 Finns begin a week-long National Radio Survey diary of their radio and audio listening.

18,000 randomly chosen Finns over the age of 9 take part in the survey annually from the Mainland Finland area. The sample of the survey represents all Finns in terms of age, gender, and residential area.

Respondents are recruited via telephone and letter, and they choose their own method of responding (paper or online journal).

The National Radio Survey measures the listening of radio and audio in Finland, and it provides the basis for reporting the weekly listener volumes of different radio channels, for instance.

The National Radio Survey's data is used also in advertising sales and campaign planning. Campaigns are planned with AudioPlanner.

RadioMedia

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