

# Commercial radio in Finland

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



RadioMedia

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# Year 2023 in numbers

## 3.4

million Finns listen  
to commercial radio  
every week

Commercial  
radio reaches

## 67%

of Finns

## 7h 47min

of listening to  
commercial radio  
/ week

## 73%

of listening is  
from live radio



## 50

commercial  
radio channels

Radio's effect on  
total ROMI is

## +56%



Commercial radio is exceptionally strong in Finland

Data and sources explained later in the publication

# Radio at the heart of the evolving audio market and closely involved in our daily lives



Commercial radio reaches **76%** of Finns **aged 25-54** every week.

**Audio is now thriving in a new and innovative era of prosperity.** Radio plays a big part in this transformation, with podcasts and audiobooks being more popular than ever. Radio is increasingly listened to via the internet in addition to traditional FM, and listeners' favorite programs are also available as recordings. Thanks to technological development and improved connections, audio is always with us, wherever we go.

**Finns are a radio-loving people.** Radio is present throughout the day, from the breakfast table to the commute and from work to household chores. It is a friend whose word is trusted. Listeners under the age of 64 strongly focus on commercial channels. During a 24-hour period, commercial radio reaches almost half of Finns, and on a weekly basis, commercial radio reaches 68% or 3.4 million people over the age of 9.

**For advertisers, radio and audio are powerful brand builders and activating media.** Attention Economy studies has proven that sound is the most potent advertising form for capturing attention. The significance of sound in various advertising formats has become a focal point of interest for advertisers, prompting brands to consider how they sound

**Commercial radio companies** in Finland provide advertisers with a broad and diverse range of products and audience. The network of responsible broadcasters offers numerous concepts ranging from spot campaigns to creative and impactful program collaboration campaigns.

Technology enables audio to be present even stronger across all platforms in the future, thus **being constantly present in life**. At the same time, artificial intelligence brings new opportunities and diversifies content, for example in the form of traffic information.

## 1

# Radio reaches Finns



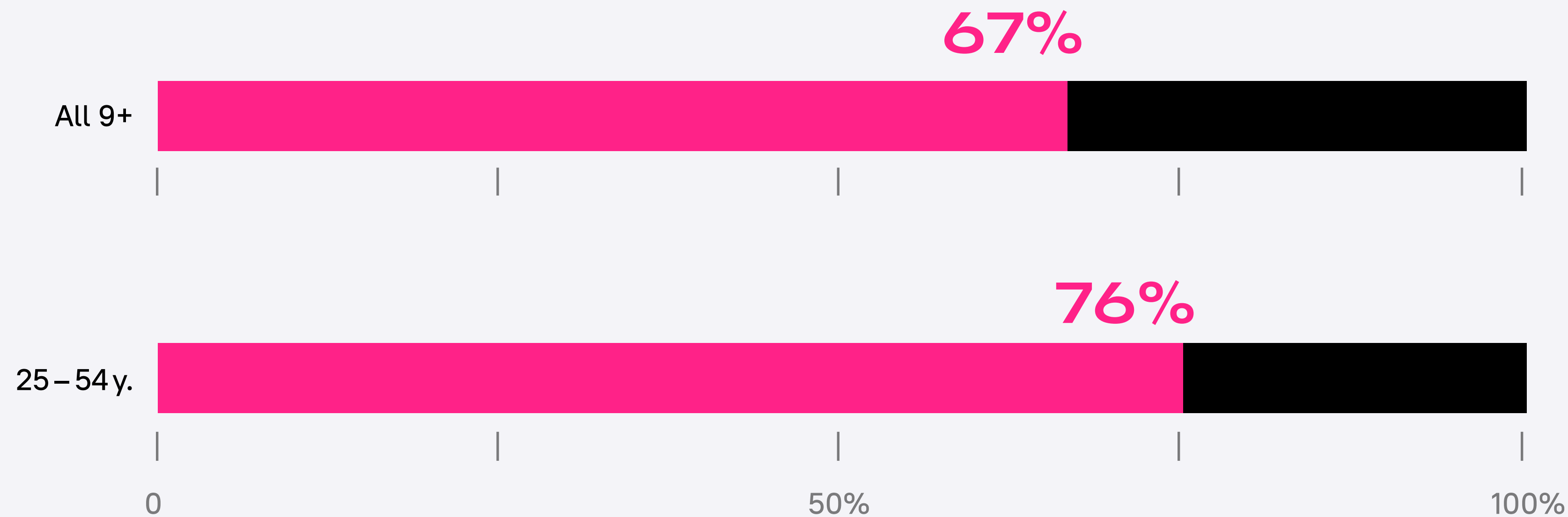
Radio SuomiPop, Aamylypsy, Nelonen Media

# Commercial radio reaches 3.4 million Finns in a week

and almost half of 25–54-year-olds daily\*

The reach of commercial radio  
in Finland in a week

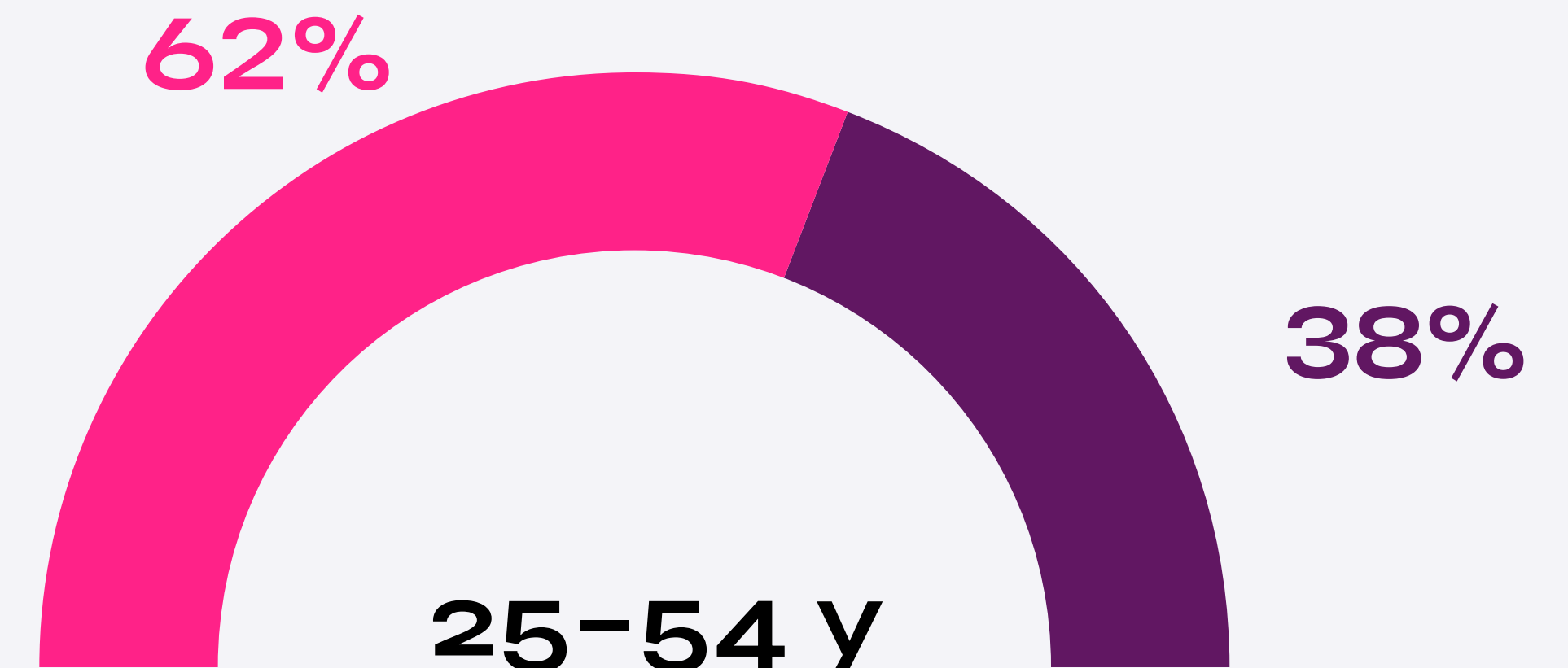
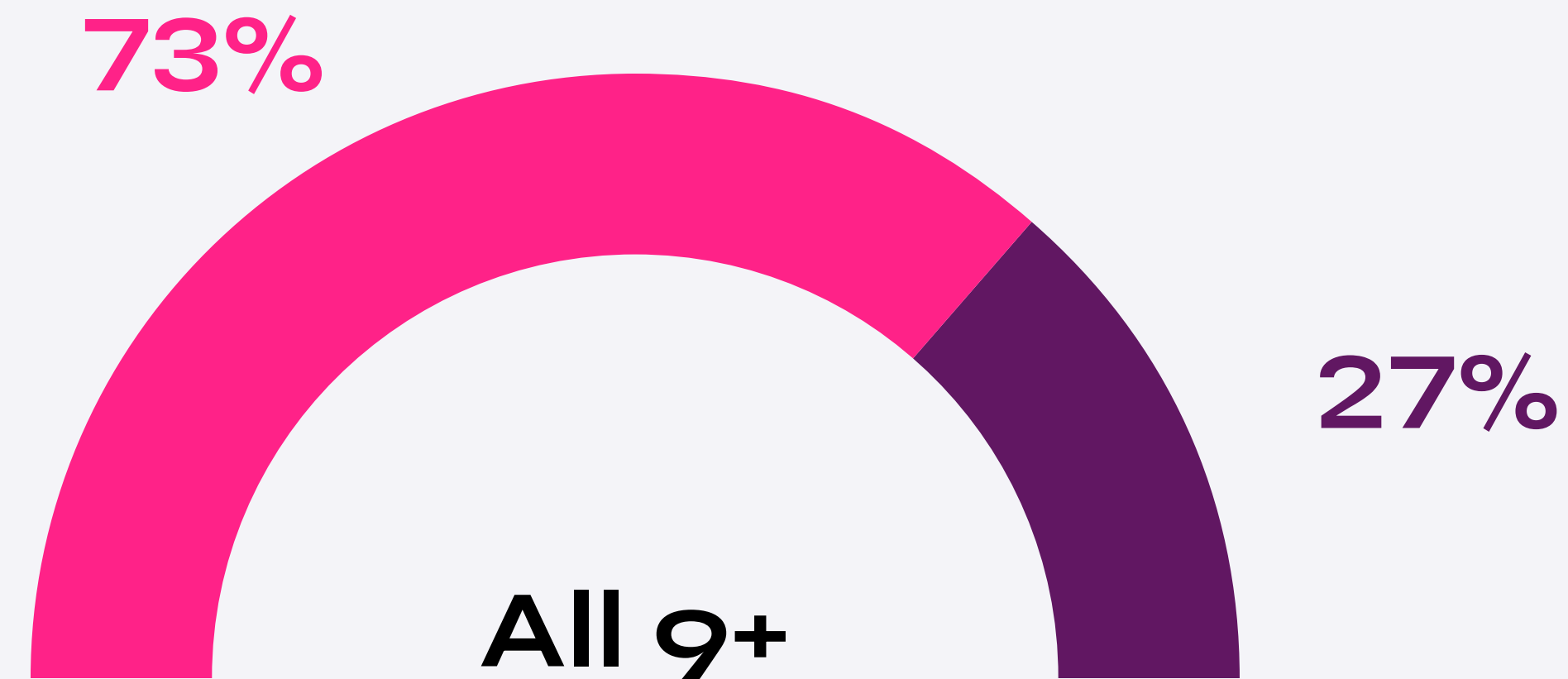
Time spent listening  
to radio in a day / week



1h 9min /  
7h 42min

1h 12min /  
8h 21min

# Radio rules the majority of audio listening minutes

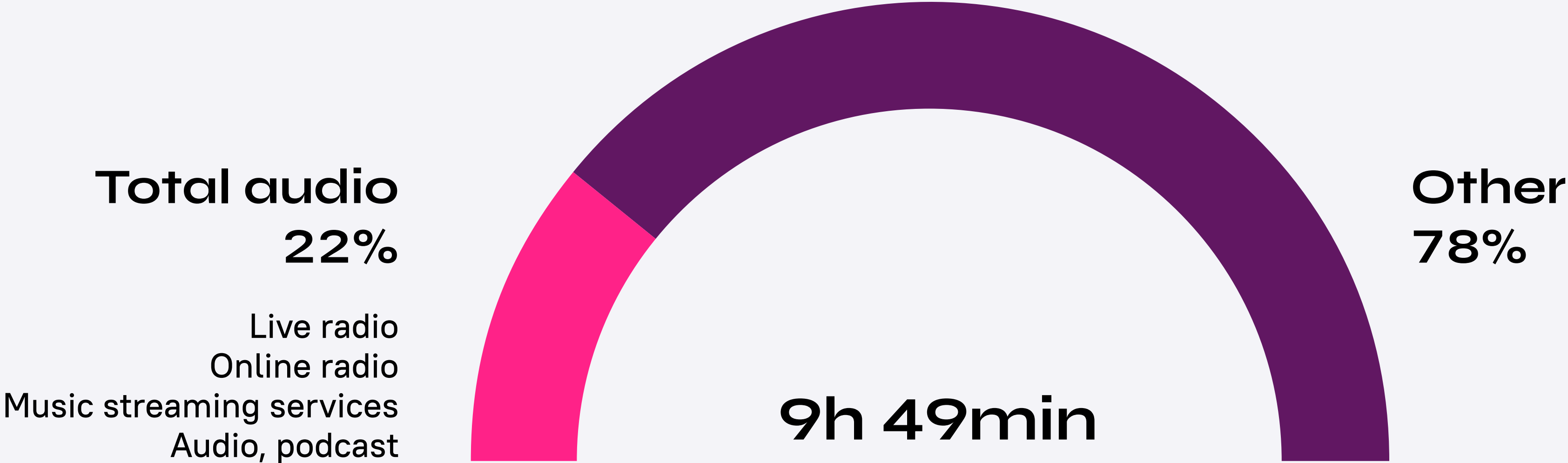


Listening to live radio



Other sources: radio shows on demand (catch up), podcasts, streaming, YouTube, own music, etc.

# A fifth of a Finn's media day is made up by audio

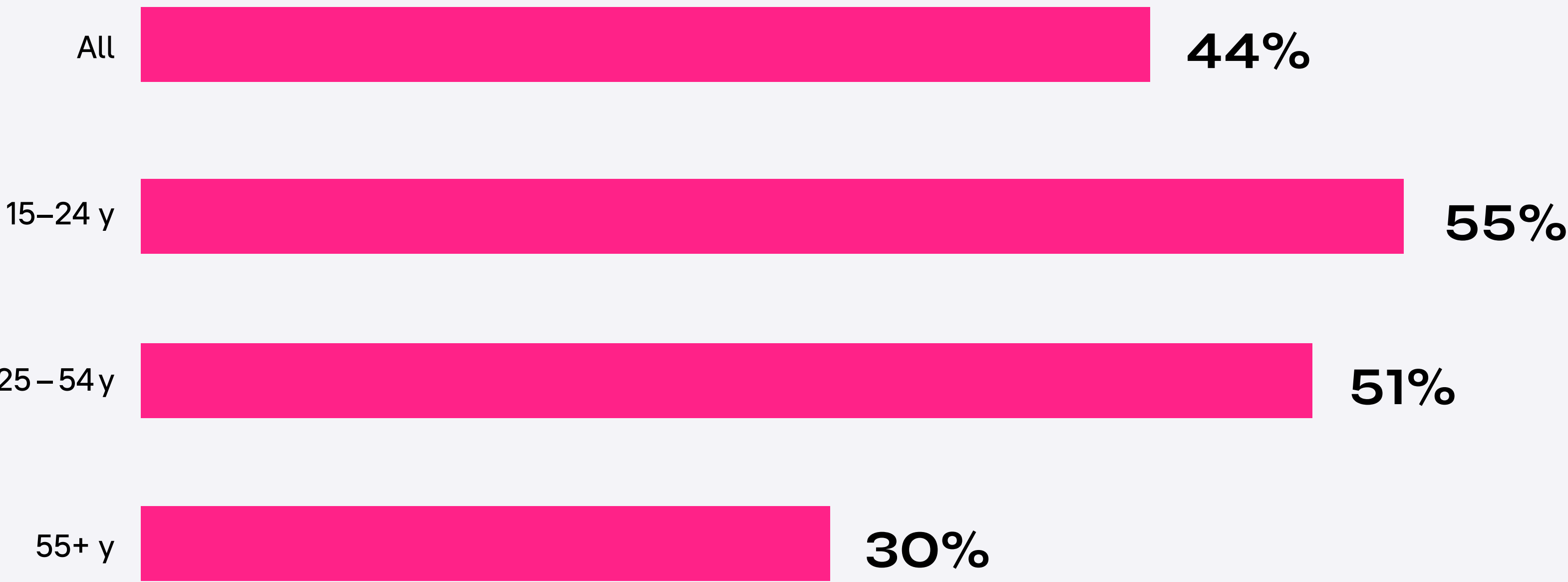


Radio Novan Päivä, Nina Backman, Bauer Media

Source: Kantarin Mind, 15-74 y. Kantar Media Finland Oy 11/2023.

# Digital audio reaches over 2 million listeners every week

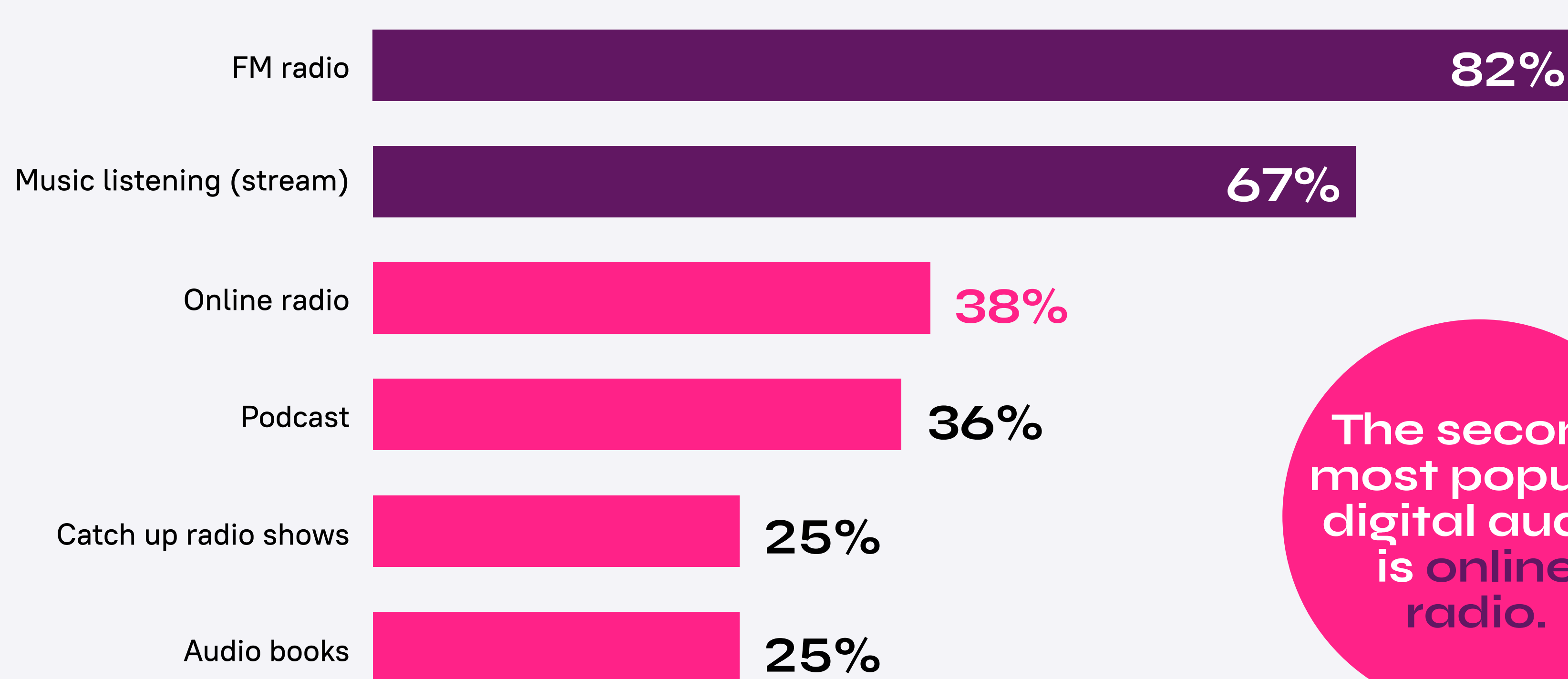
Weekly reach



Source: Kansallinen Radiotutkimus, Live radio and on demand listening in 10-12/2023

# FM radio is the most popular

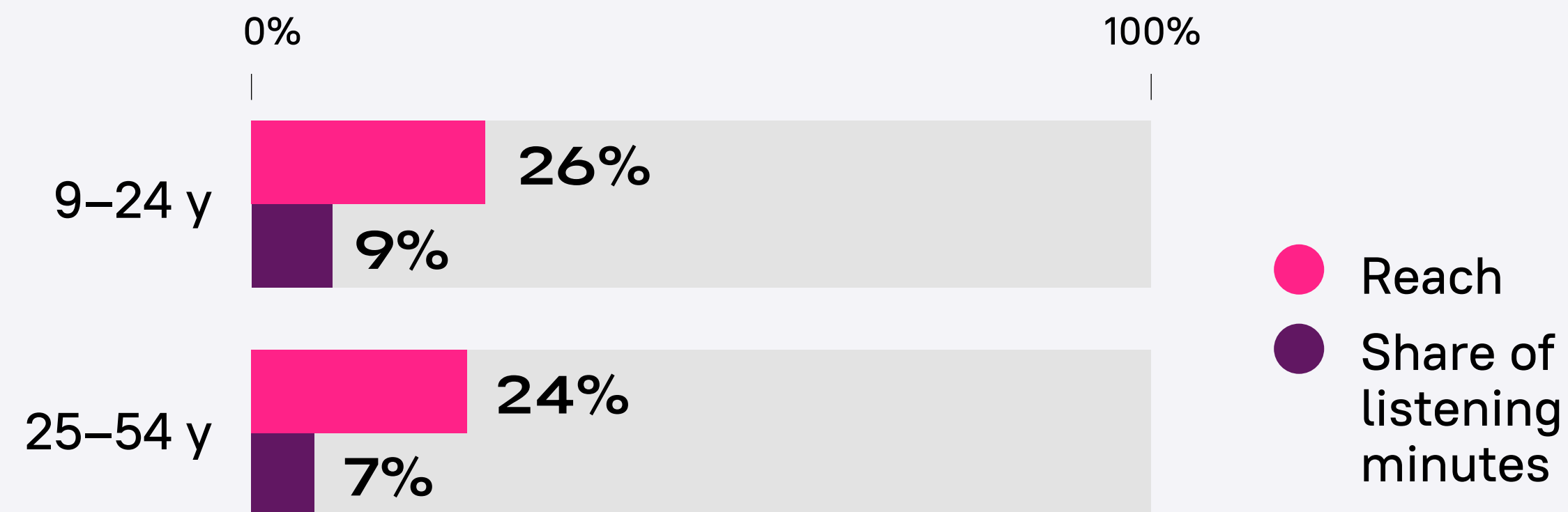
Weekly reach by media



Two out  
of three  
listen to  
**music digitally**  
every week.

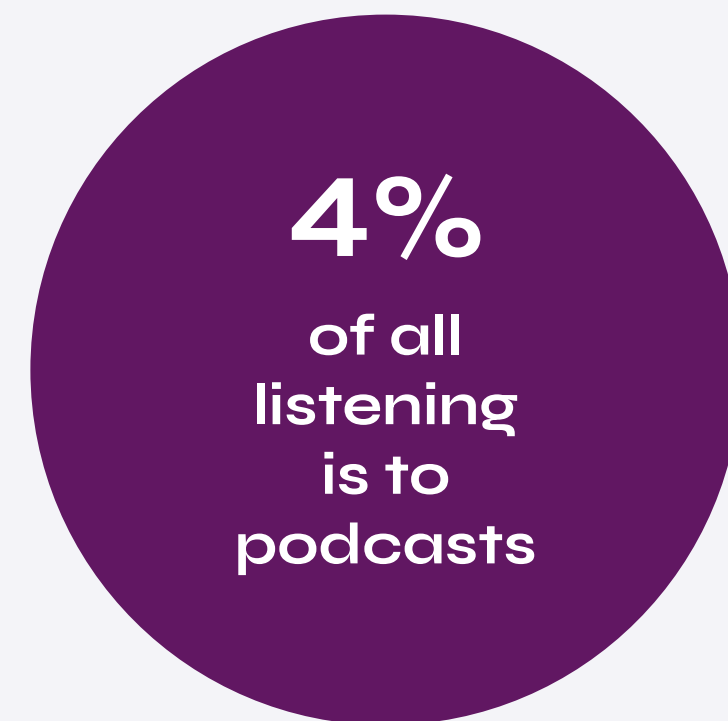
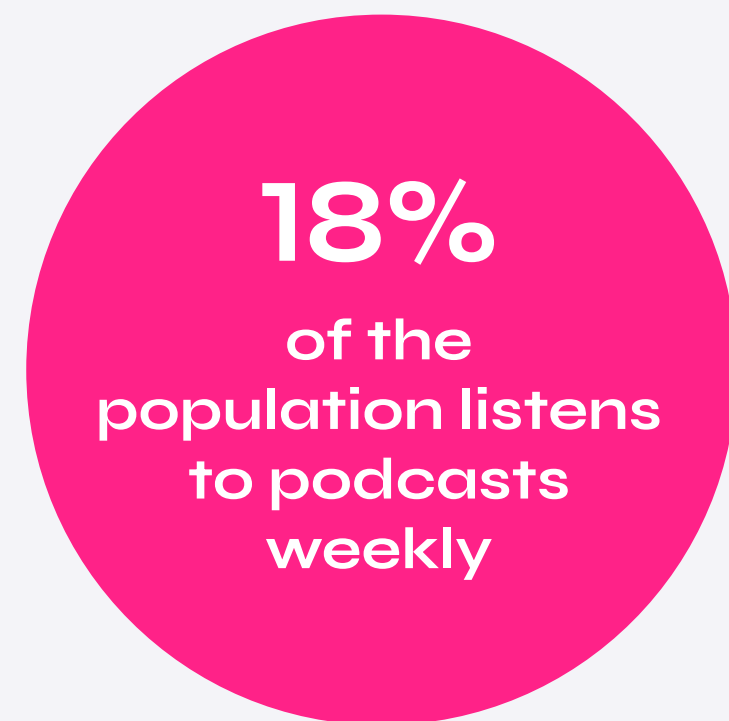
The second  
most popular  
digital audio  
is **online**  
radio.

# Podcast and radio on-demand content\* reaches 894,000 Finns every week



Reach

Time spent listening

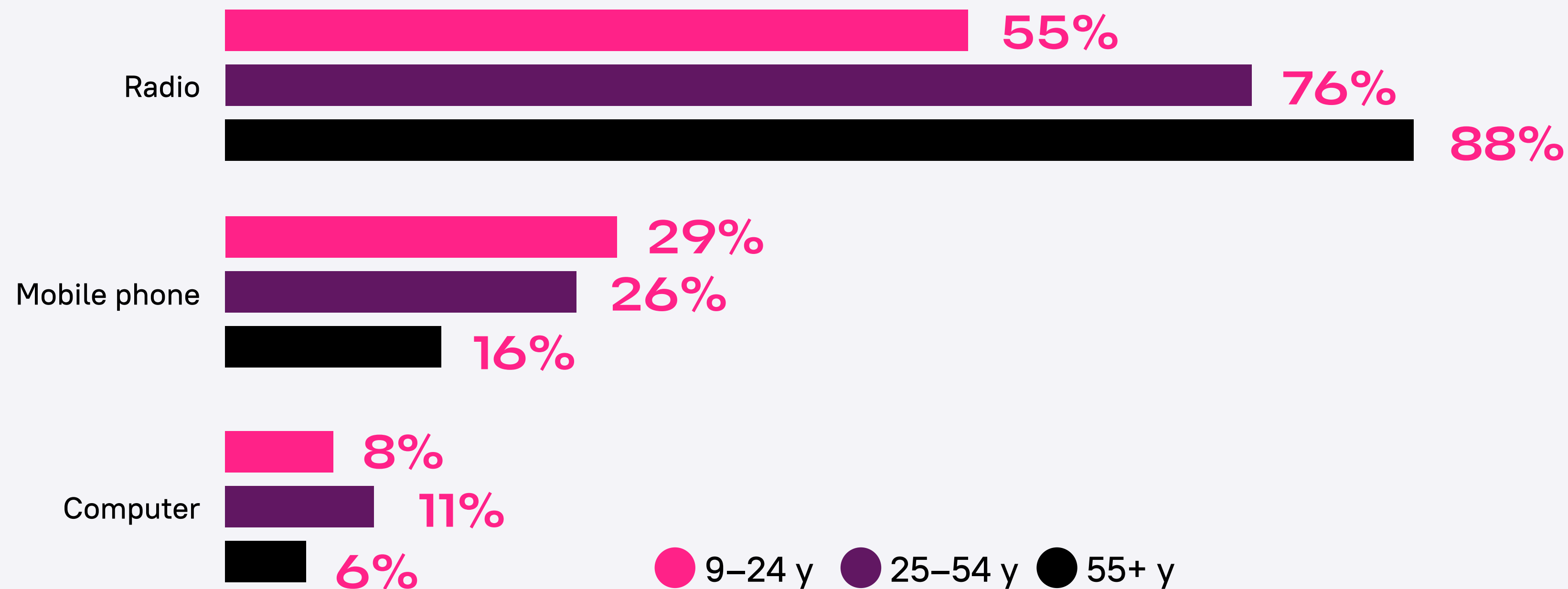


## Radio programs are interesting on-demand content

The most popular digital content\*\* for commercial broadcasters in 2023 were:

- Aamulypsy, Suomipop
- Enbuske & paparazzi Hörkkö
- Kimanttia
- Korporaatio, Radio Rock
- NRJ:n aamu Jokela & Saarinen
- OMG
- Radio Cityn päivä
- Radio Novan aamu
- Radio Pookin päivä
- Selviytyjät-podcast

# A fifth of Finns listen to radio on their mobile every week\*



\*22% of over 9-year-old Finns listen to radio on their mobile every week.

Source: Finnpanel, KRT 7-12/2023, radio listening device during the research week. What devices did you use to listen to the radio during the research week?

## 2

# Radio is part of consumers' daily lives

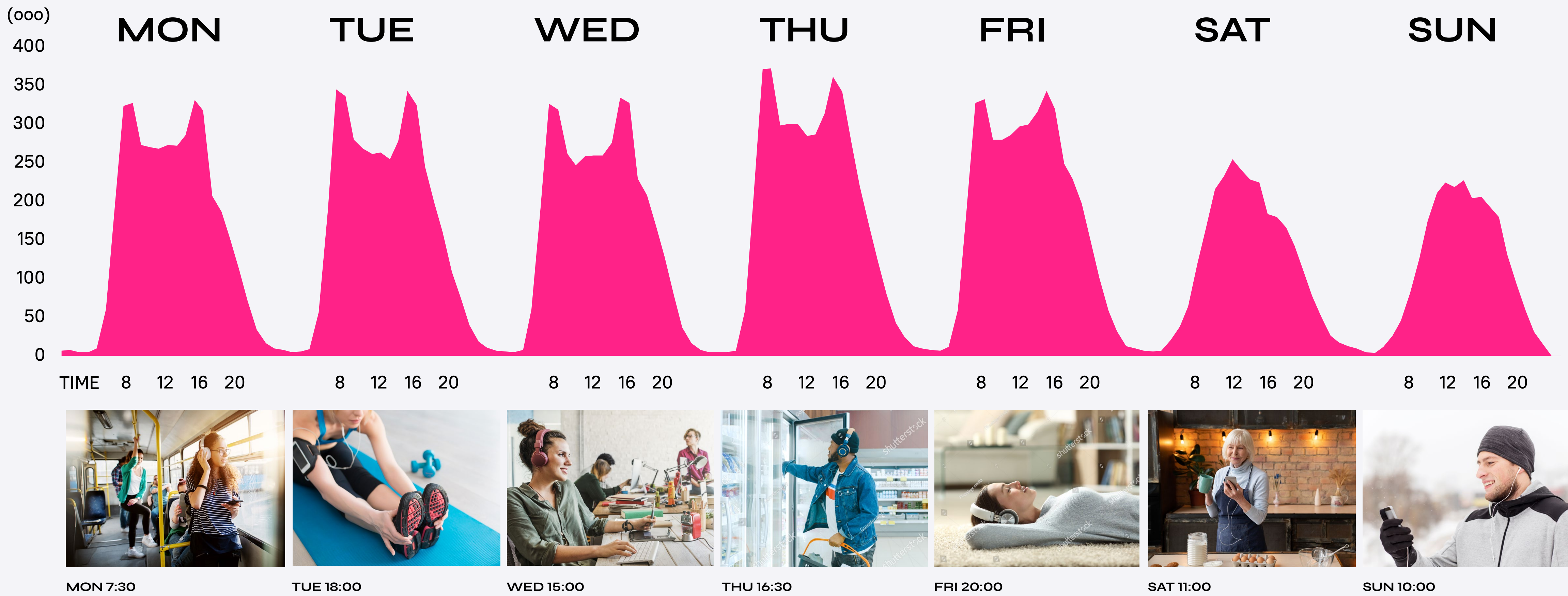
Radio is a listener's friend and a daily rhythm setter. Radio is connected to many everyday events in people's lives, bringing colour and company.



NRJ, Aamu, Bauer Media

# 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



Source: Finnpanel Oy, National Radio Survey 2023

# Radio is also listened to alongside other activities



Radio is a true hands free media, accompanying listeners from dawn to dusk

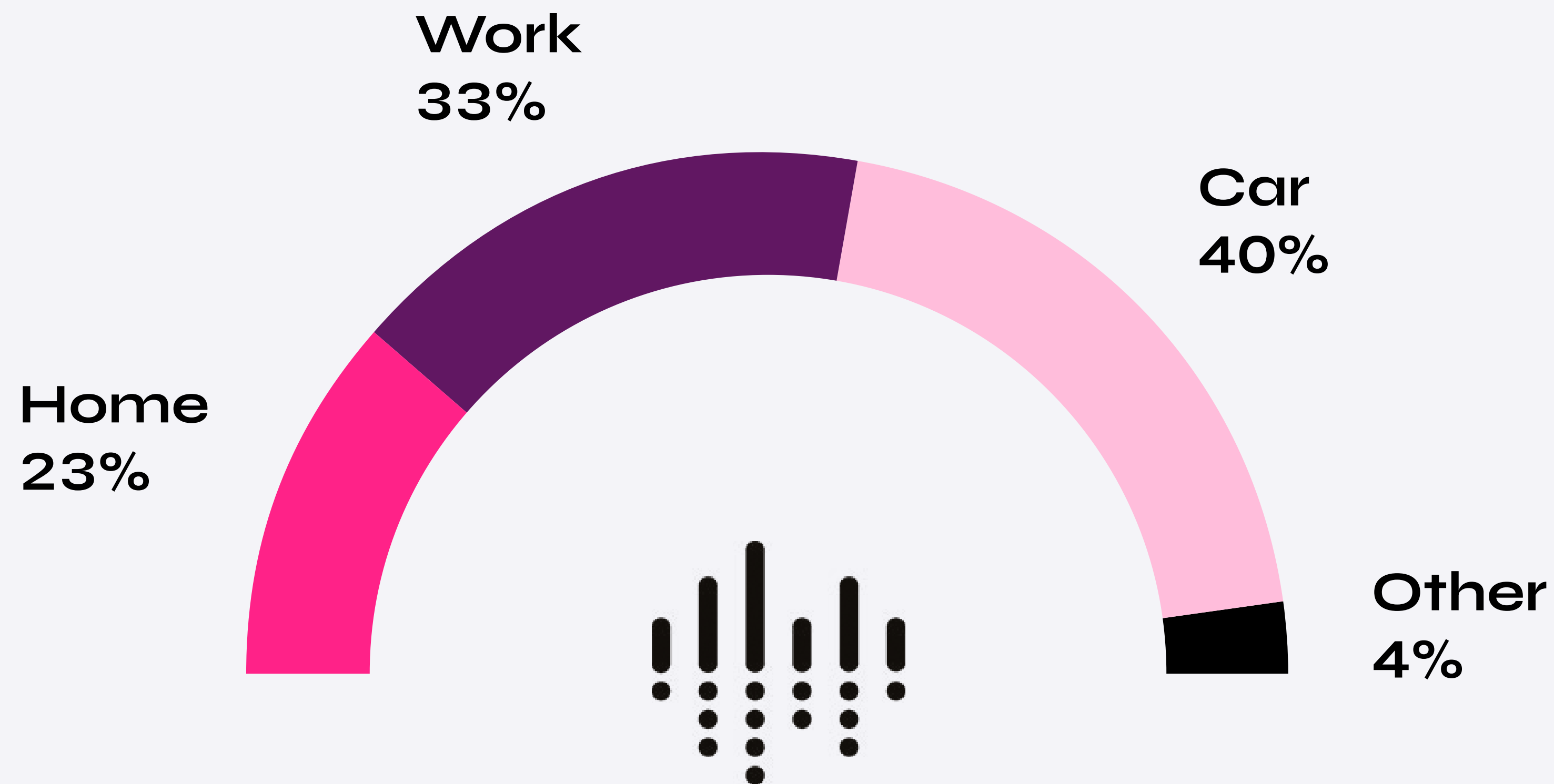


Digital listening increases encounters and brings radio even more present everywhere

# 74%

listen to audio alongside their daily activities, when their minds and ears are open, attentive, and most receptive to brand messages.

# Radio is listened to at home, in the car, and at work



# Radio dominates the world of audio in cars

## Radio is #1 in in-car listening.

Listening is integrated in a versatile way both into a car's dashboard and entertainment systems with the help of mobile phones, applications, and the latest hybrid technologies.

## 85%

of listening in a car is made up by live radio.\*

## 93%

want live radio to be freely available in cars in the future as well

## 89%

of car buyers say that radio must be a default feature in a car.

For **the advertiser**, in-car listening offers an impactful and often intimate moment with the consumer. In a place where, **other media cannot reach.**

# Live radio and audio on demand complement each other

## Live radio

offers boost and company with the familiar voices of listener's favourite station. It's all about keeping up to date and feeling part of the wider world.

## Podcasts

are listened for entertainment and to pass the time. One seeks to learn or deepen understanding of a particular topic.

## On-demand-music

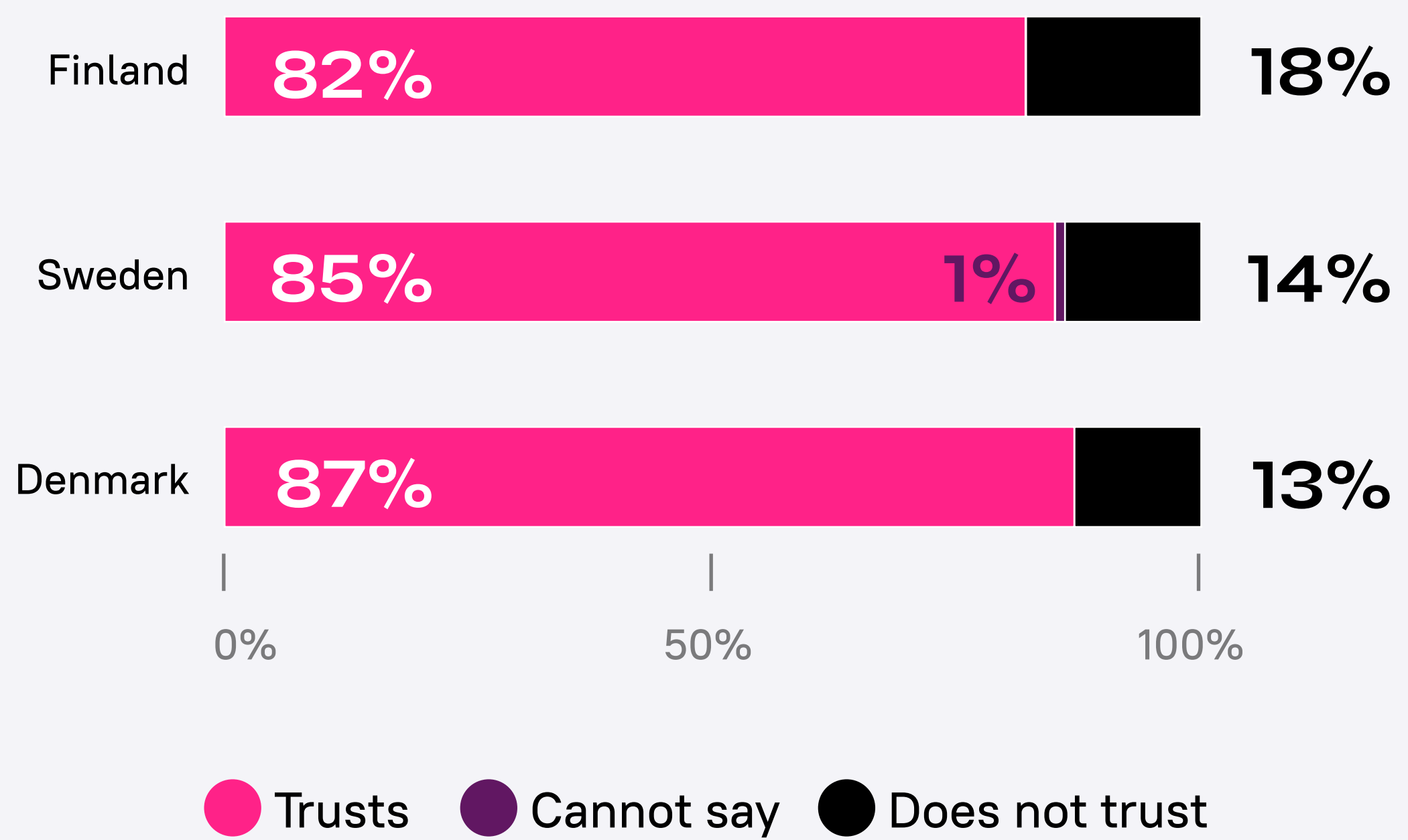
is listened to when people want to affect their own mood.

Aito Iskelmä, Elna and Marko, Nelonen Media



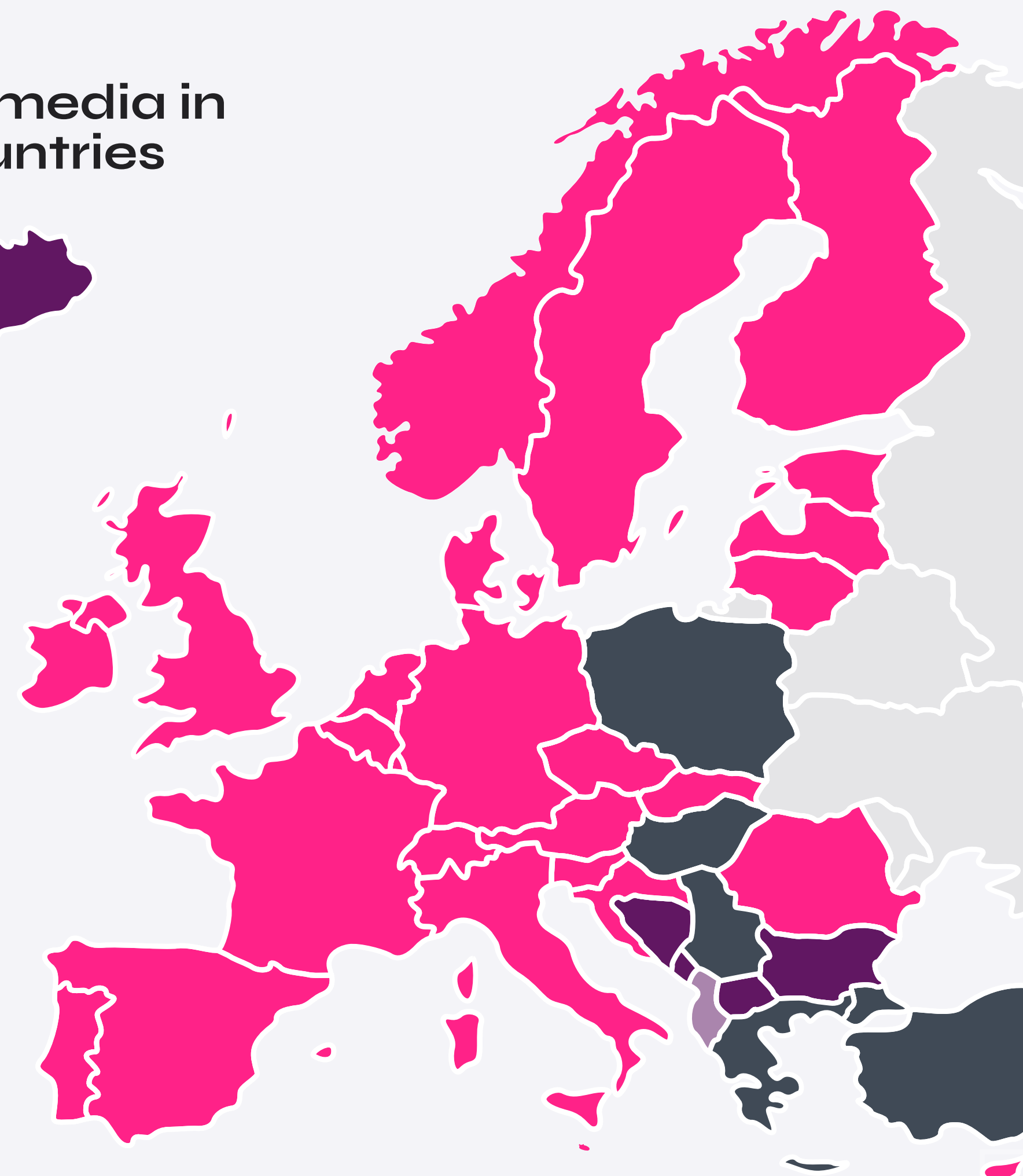
# Radio is a trusted media

Radio is the most trusted media in Europe, particularly trusted in the Nordic countries



Most trusted media in European countries

- Radio
- TV
- Print media
- Internet
- Social media



# 3

## Radio delivers results for advertisers

Radio improves the results of campaigns, adds efficiency, increases brand trust, and boosts ad recall and website traffic, among other things.



Radio Rock, Korporaatio, Nelonen Media

# On the radio, target your message



COVERS  
WHOLE OF  
FINLAND

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.

# 50 radio channels selling advertising space

There are 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:



ISKELMÄ



Radio Pori 89,4



## SANOMA MEDIA FINLAND:



RADIOVAASA  
EST. 1985



## DIGITAL SERVICES:



RadioPlay

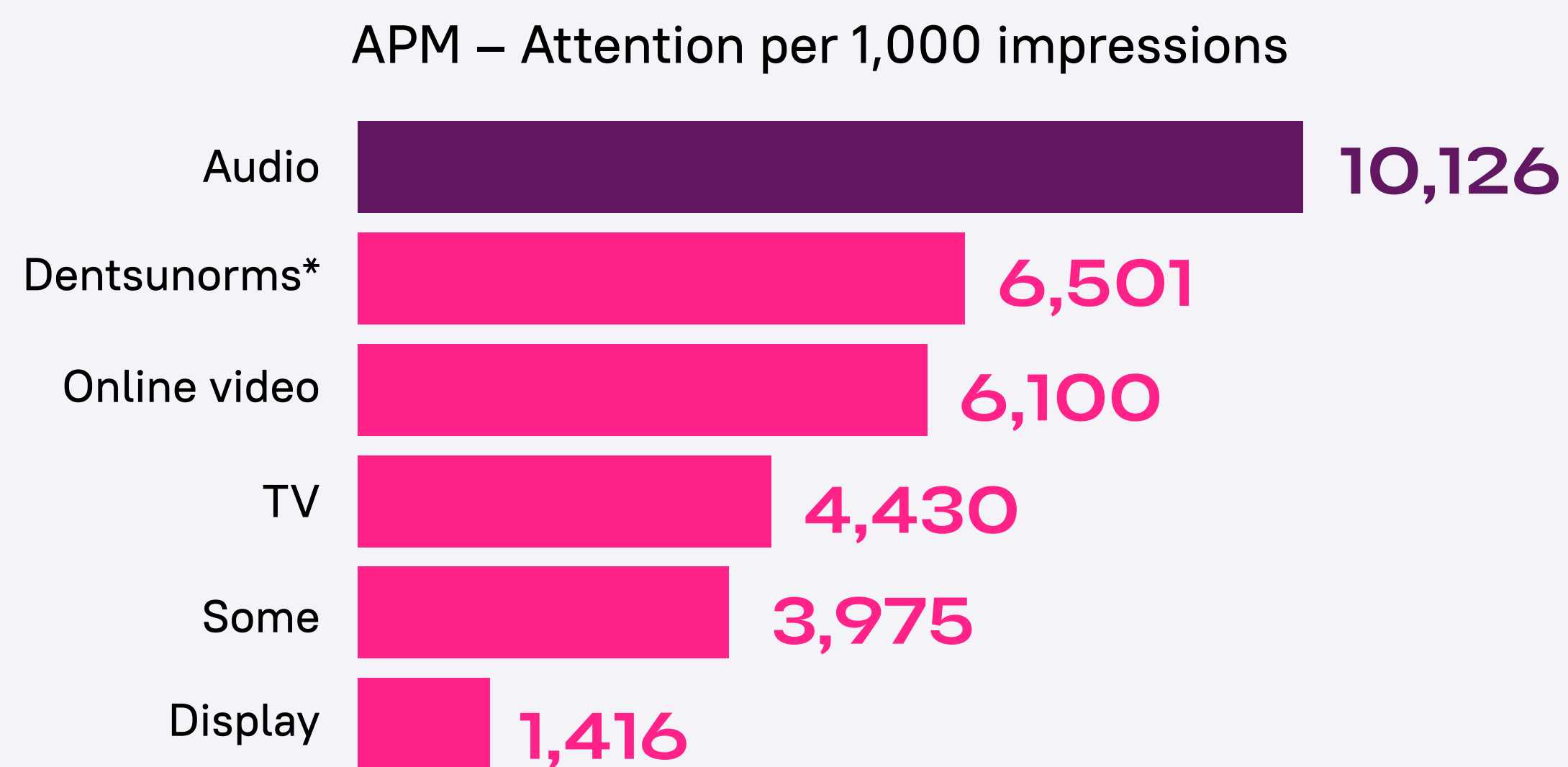
PODPLAY

Radioplayer  
SUOMI

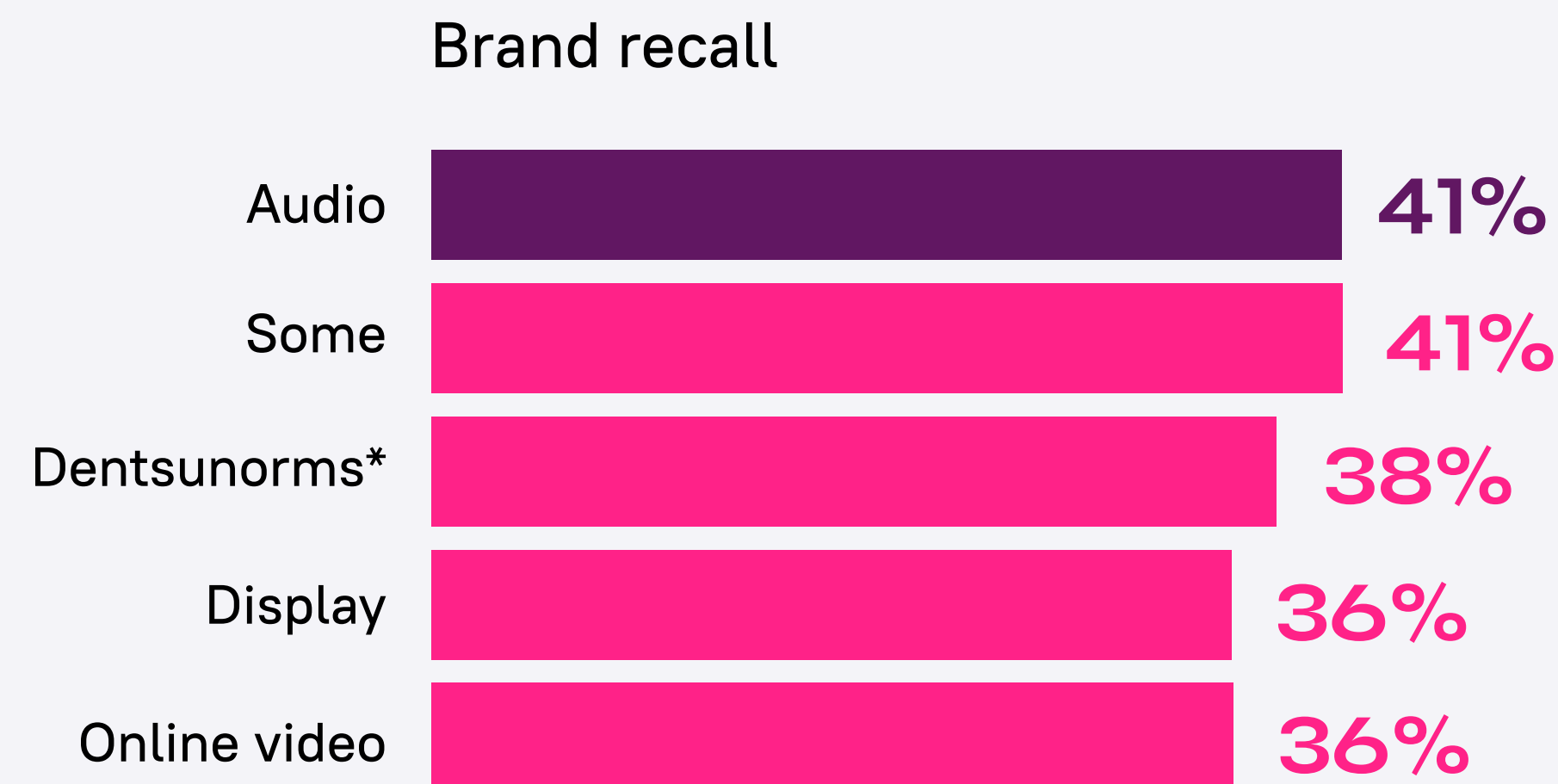
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# Audio advertising generates higher brand recall than advertising average

The attention of the ad has a direct impact on its effectiveness. Attention is essential for many cognitive functions such as learning, memory and decision-making, including advertising effectiveness. Research shows that verified listening/viewing time to an advertisement increases the likelihood of positive advertising effects.

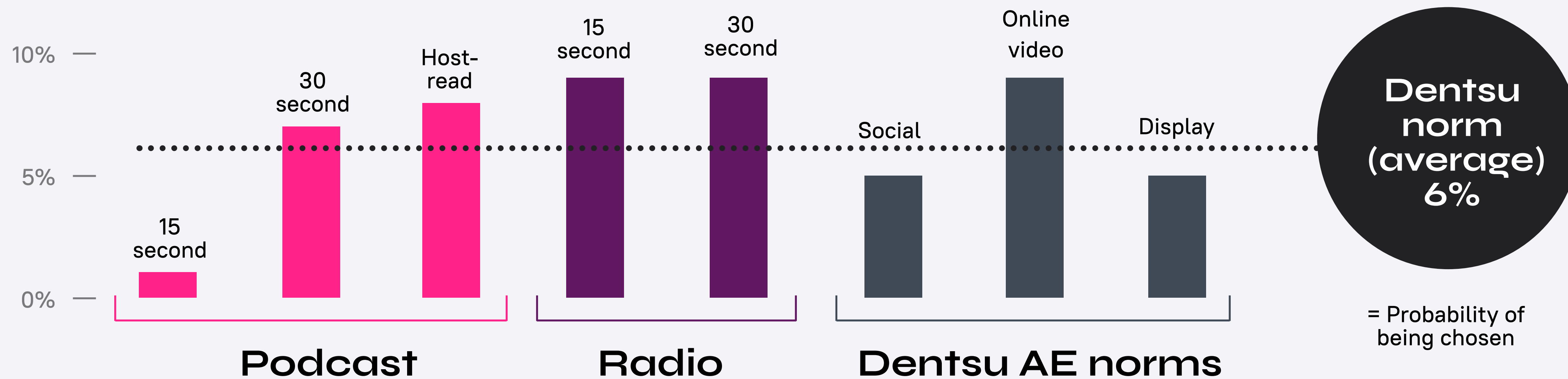


APM (average attentive seconds per 000) by ad format. The average APM for audio advertising is 10,126 seconds, **56% higher** than the average for other ad formats measured by \*Dentsu (6,501).



The effectiveness of audio advertising in brand recall is **8% higher** compared to average advertising.

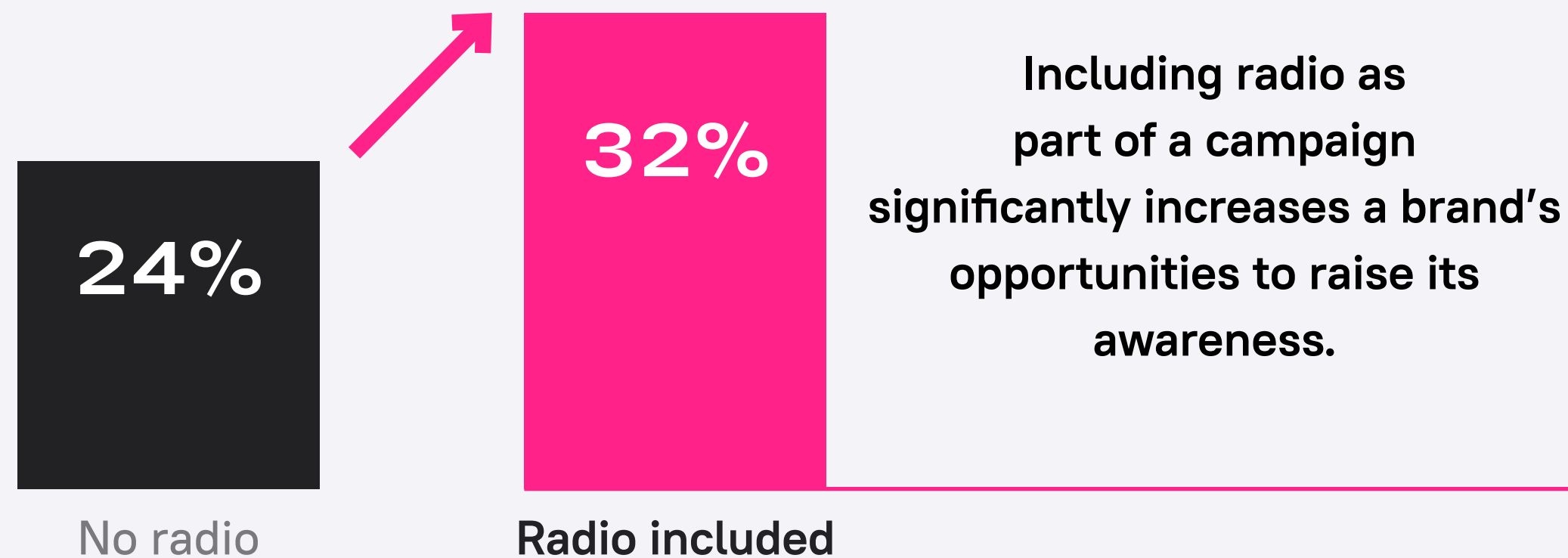
# Radio and podcasts uplift brand choice



# Radio helps brands to grow

Campaigns that  
include radio have a stronger  
“fame effect”\*\*

**+8% unit**

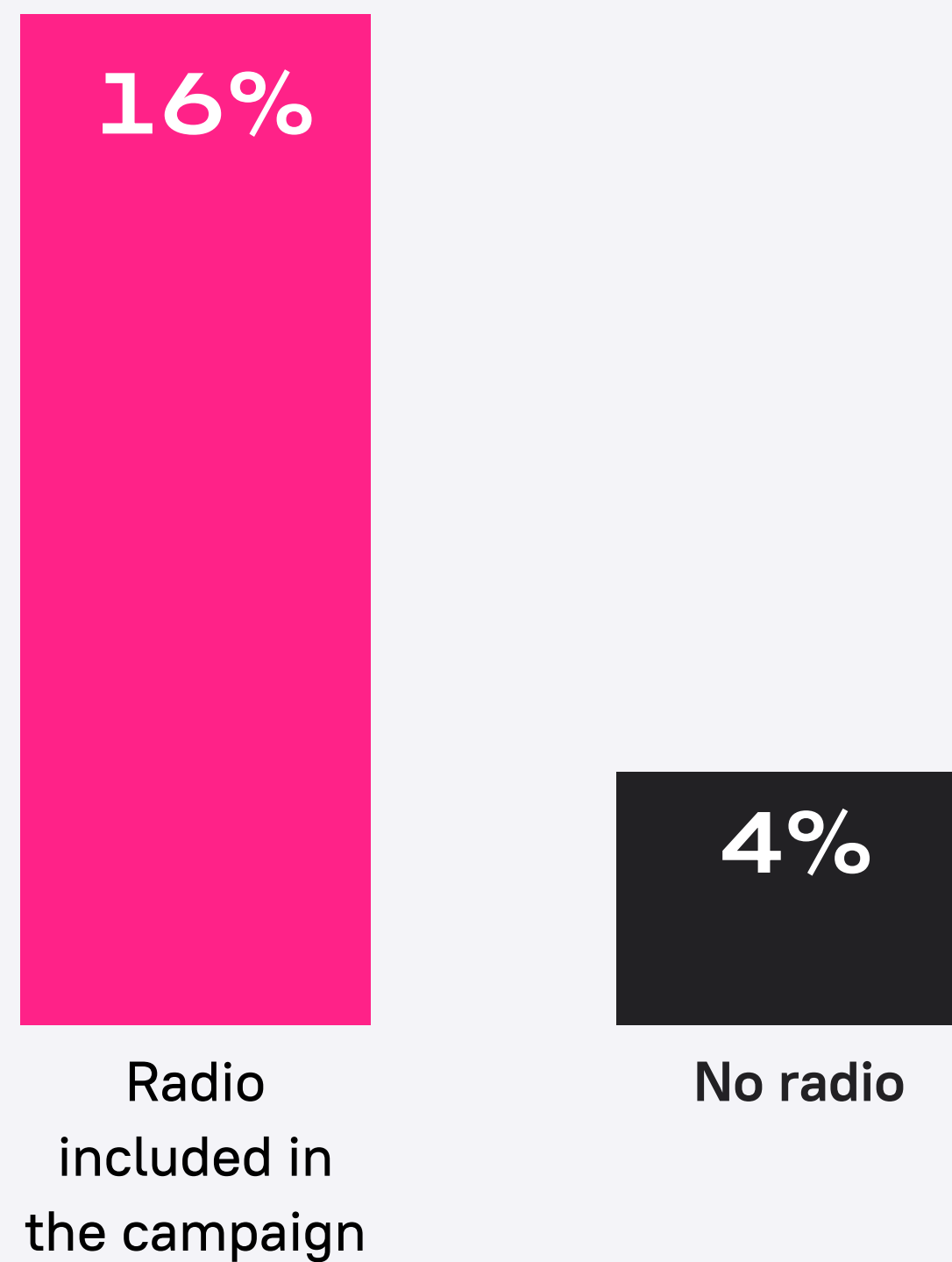


Radio can improve  
the cost-efficiency of  
brand campaigns by over

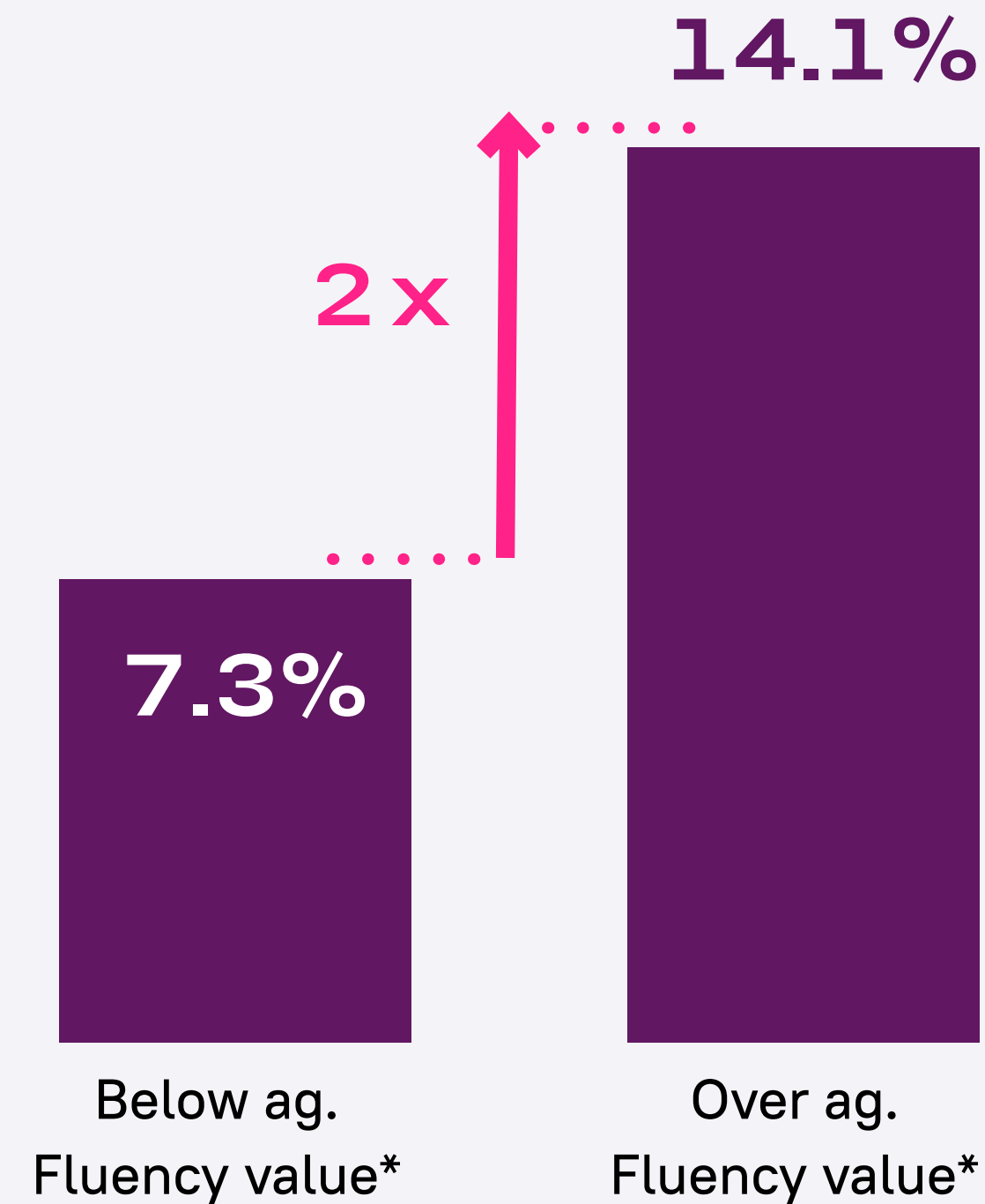
**20%\***

# Radio builds brand trust

Including radio in campaigns  
increases brand trust



Well-branded radio ads double  
the trust impact of advertising



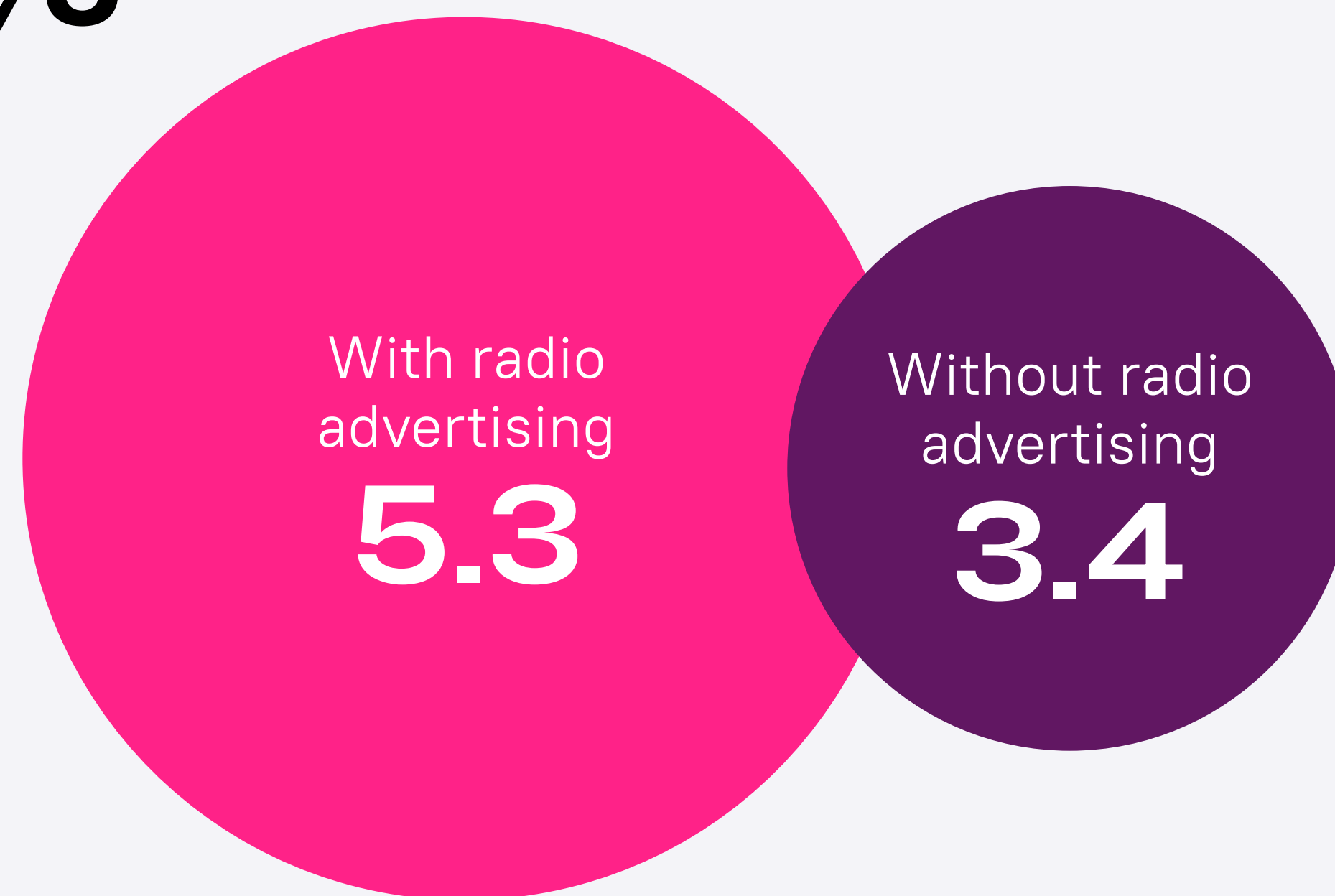
\*System1 Fluency rating measures how well a brand is identified and linked to an ad. Source: Peter Field & the IPA databank and System1 and Radiocentre, 55 campaigns & 50,000+ UK respondents, media weighted by GRP

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

The effect of audio  
on total ROMI is

**+56%**

Total ROMI:



Total ROMI has grown significantly during the last few years – especially when radio advertising is involved

2018–2021



2015–2017

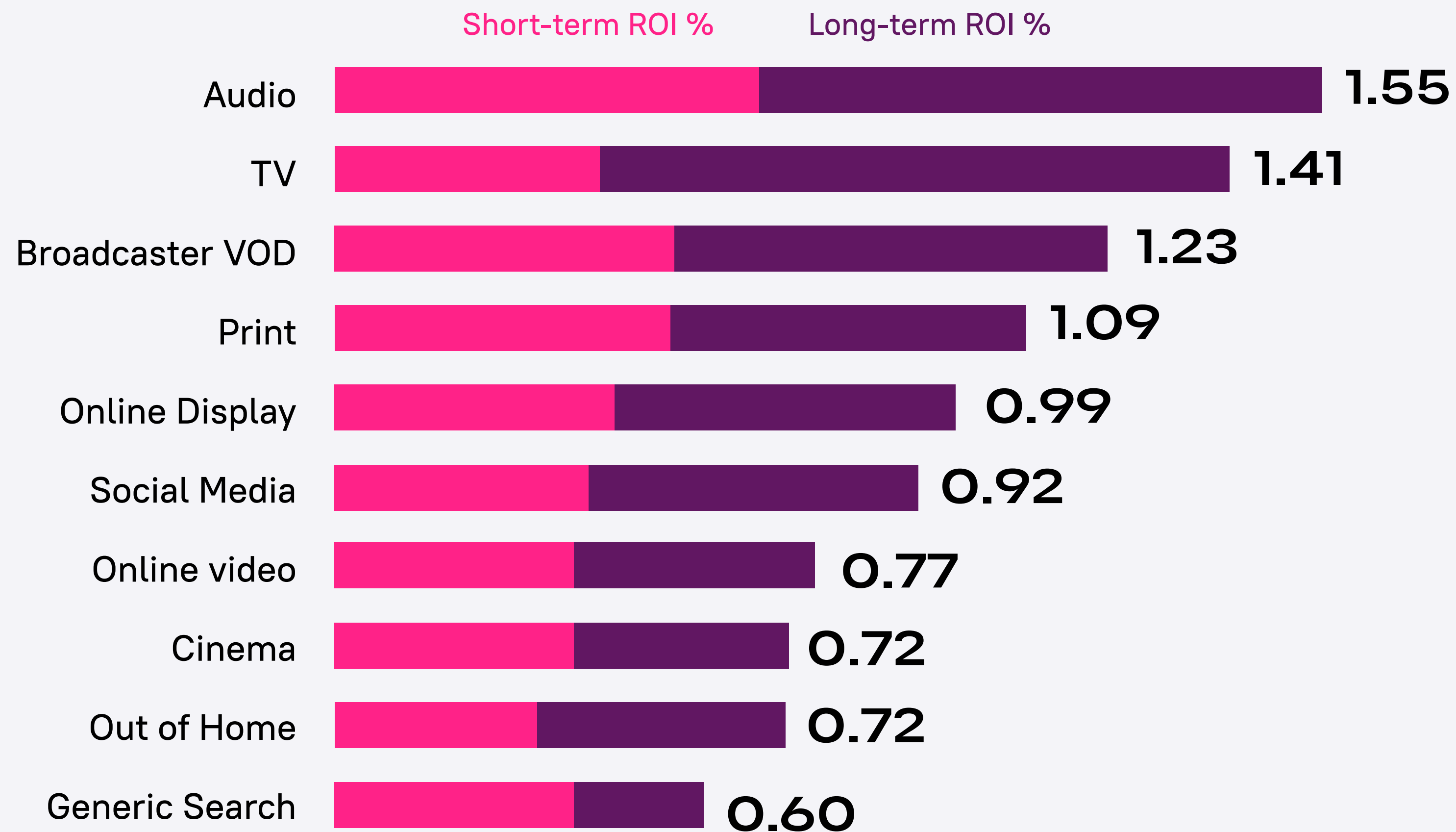


2012–2014



# Audio advertising brings the highest ROI

ROI index (short and long-term) by media



Audio  
advertising  
delivers the  
best overall  
return.

# Radio advertising drives traffic online

It increases website visits, Google searches and online purchases

## +29%

increase to Google  
searches with  
radio advertising<sup>1</sup>

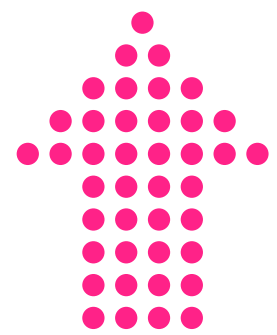
## +43%

average increase in  
website visits for brands  
thanks to radio<sup>2</sup>

Radio advertising boosts  
brand browsing by

## 52%

ella<sup>3</sup>



## 5 times

more website  
visits/GRP

on average for radio campaigns with a clear  
call-to-action to go online or use the app.<sup>2</sup>

Radio generates a

## +21%

increase in B2C brand  
website traffic<sup>4</sup>

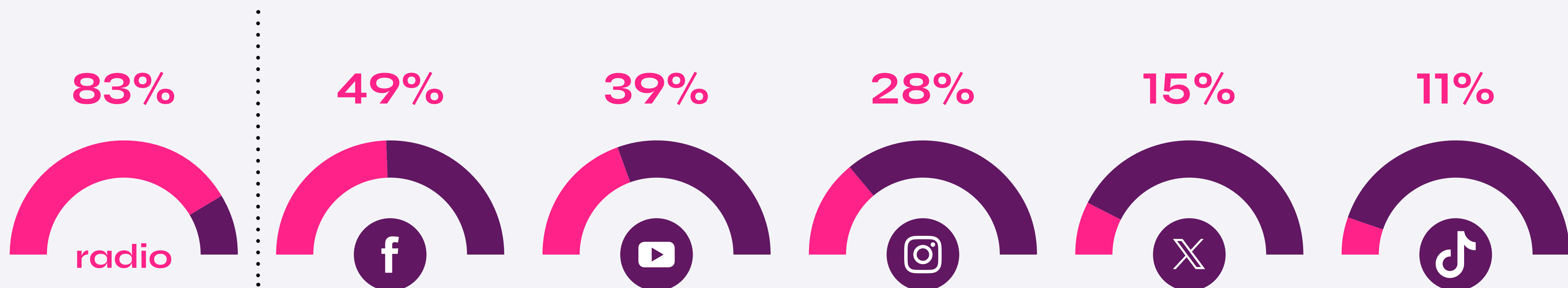
Radio activates browsing  
of a brand's website

## 4 times

more cost-  
effectively than other media<sup>3</sup>

# Radio reaches online buyers better than social media

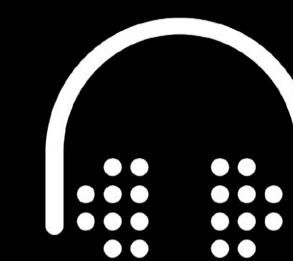
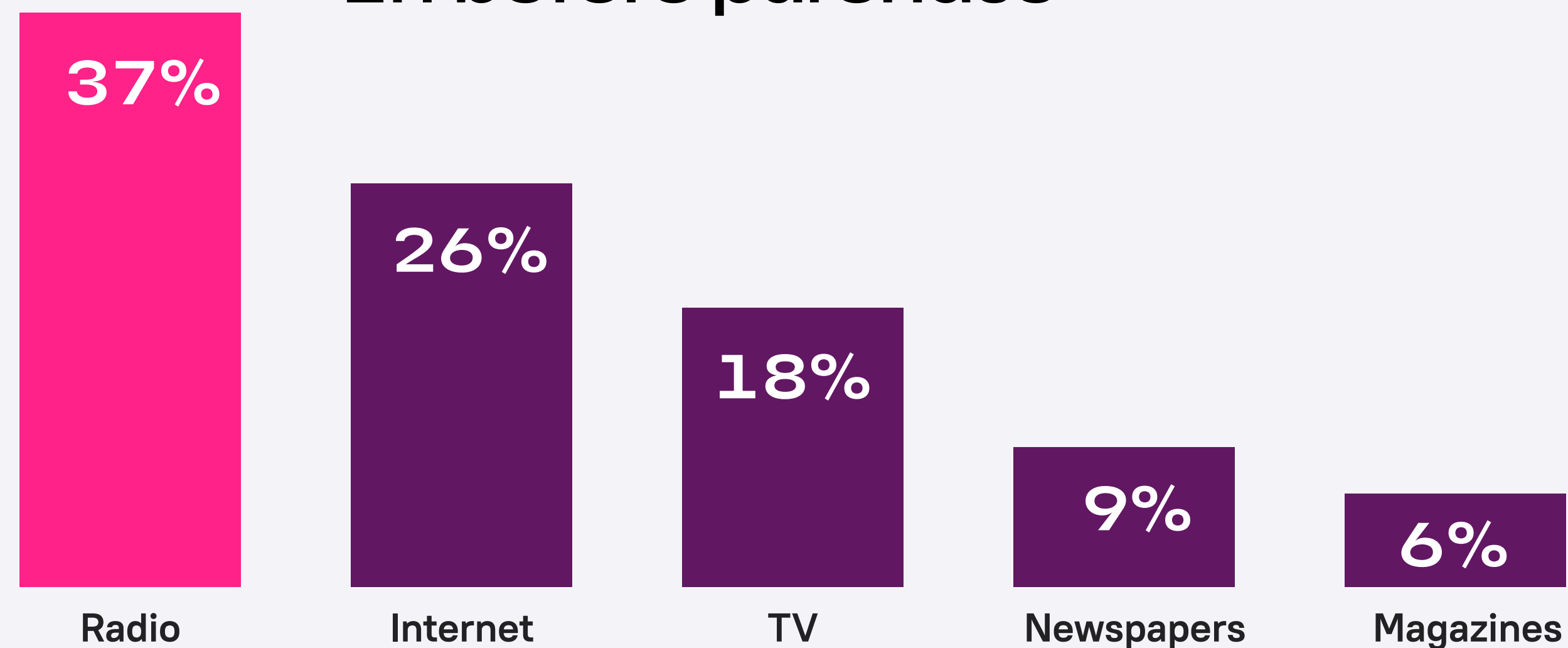
## radio vs social media reach



Source: Numeris RTS Canada Fall 2022 18+ Total Canada; Department/ Warehouse Stores shopped online in past year; Social networks used past 7 days; Total Radio Market Reach 7 day cume. Canadians who have shopped internet department/ warehouse stores in the past year – 7-day reach 18+

# Radio is the media with the highest reach near the time of purchase

Media following  
2h before purchase



Radio is the best media at reaching people on their way to the store and is closest to the time of purchase.

# 4 Audio advertising is much more than spots

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



Hitmix, Nelonen Media

Sound influences effectively

# Audio advertising evokes personal experiences and images

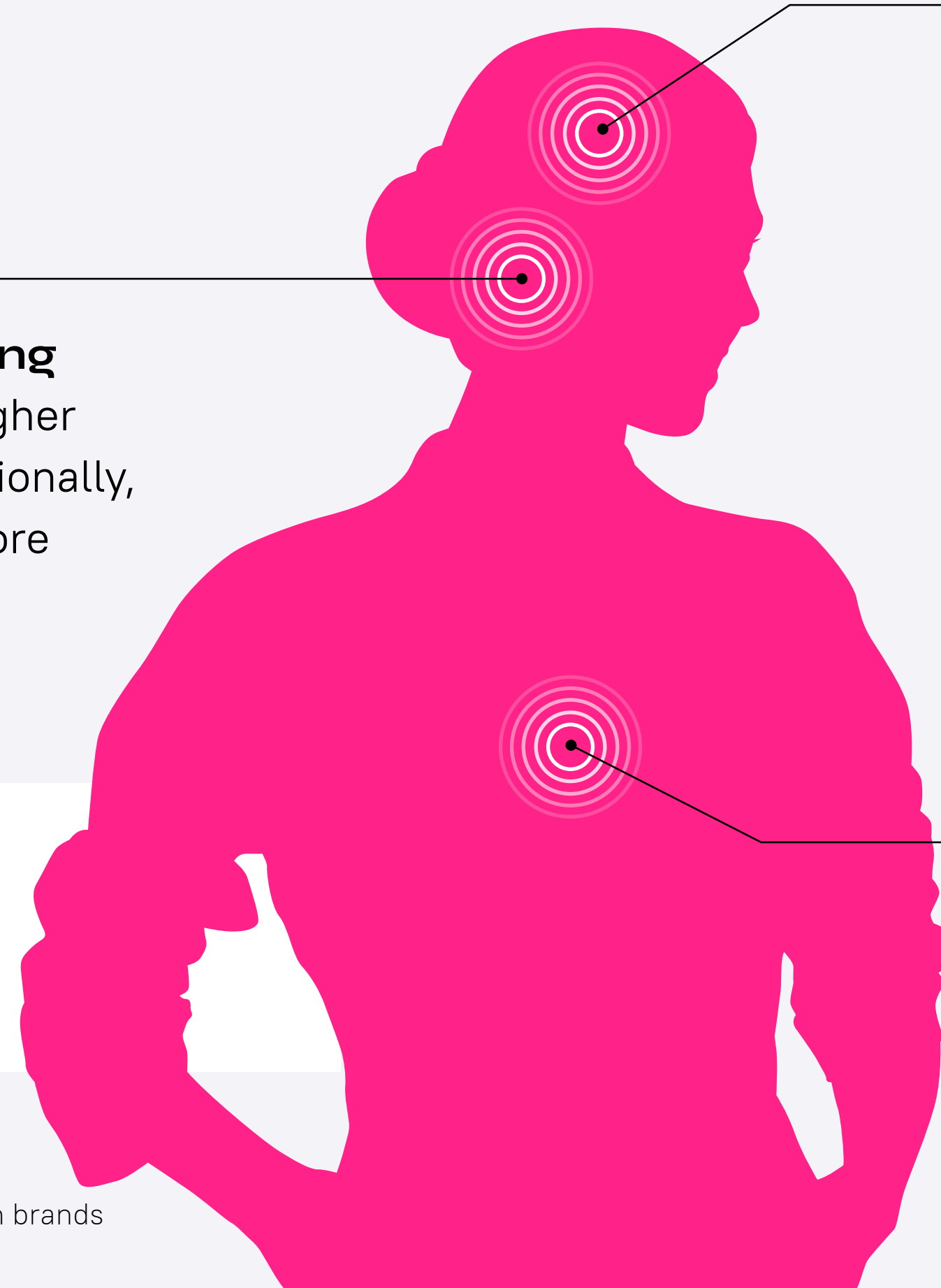
That is why it is so impressive.

## 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.**

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



## 2 REACHES AND IMPACTS

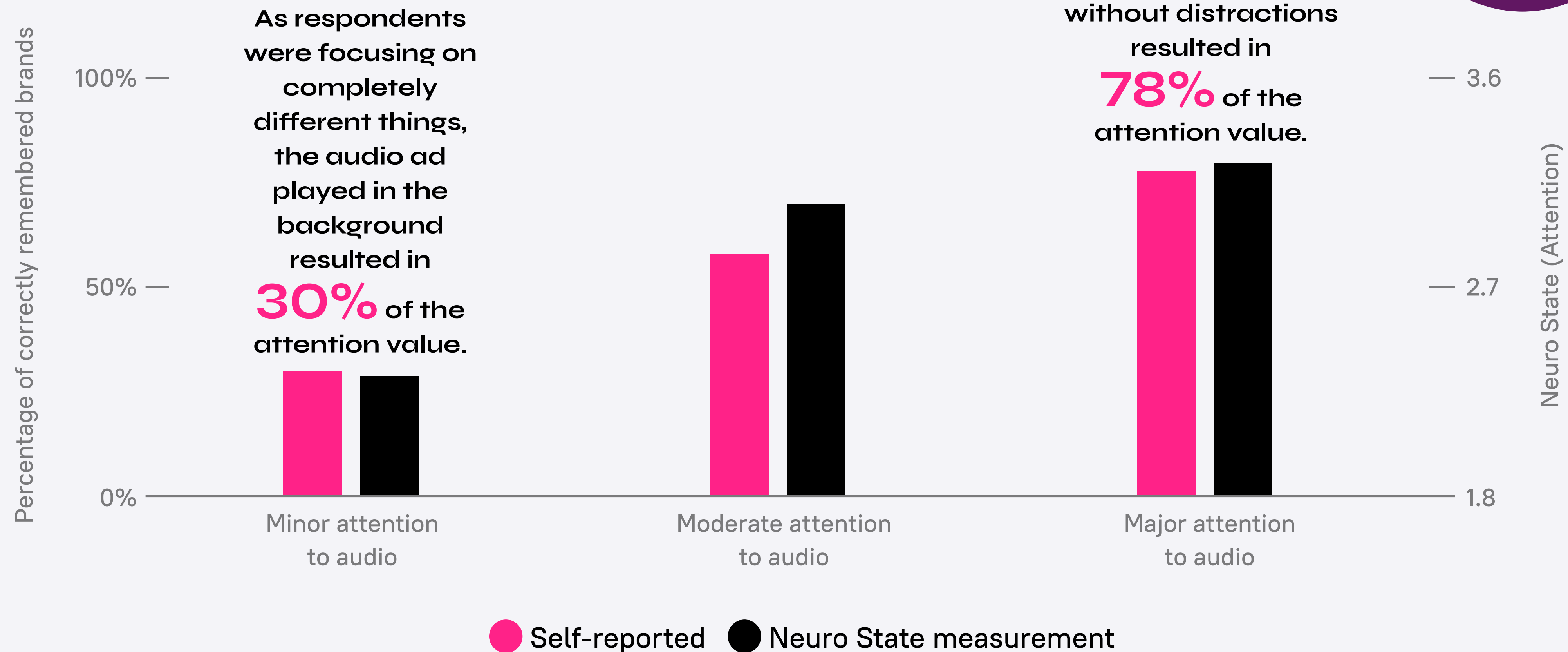
**A single sound triggers tens of thousands of personal memories in its listeners.** The sound of a sizzling sauna stove evokes familiar sensations and the ambiance of one's own sauna with its scents and surroundings. A visual ad cannot achieve the same effect because a picture chosen by someone else 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 Puuilo ad 'Tuutko hakee? En. Tuun.' sounds like, even if you only see the text." \*

# Audio is "always on"

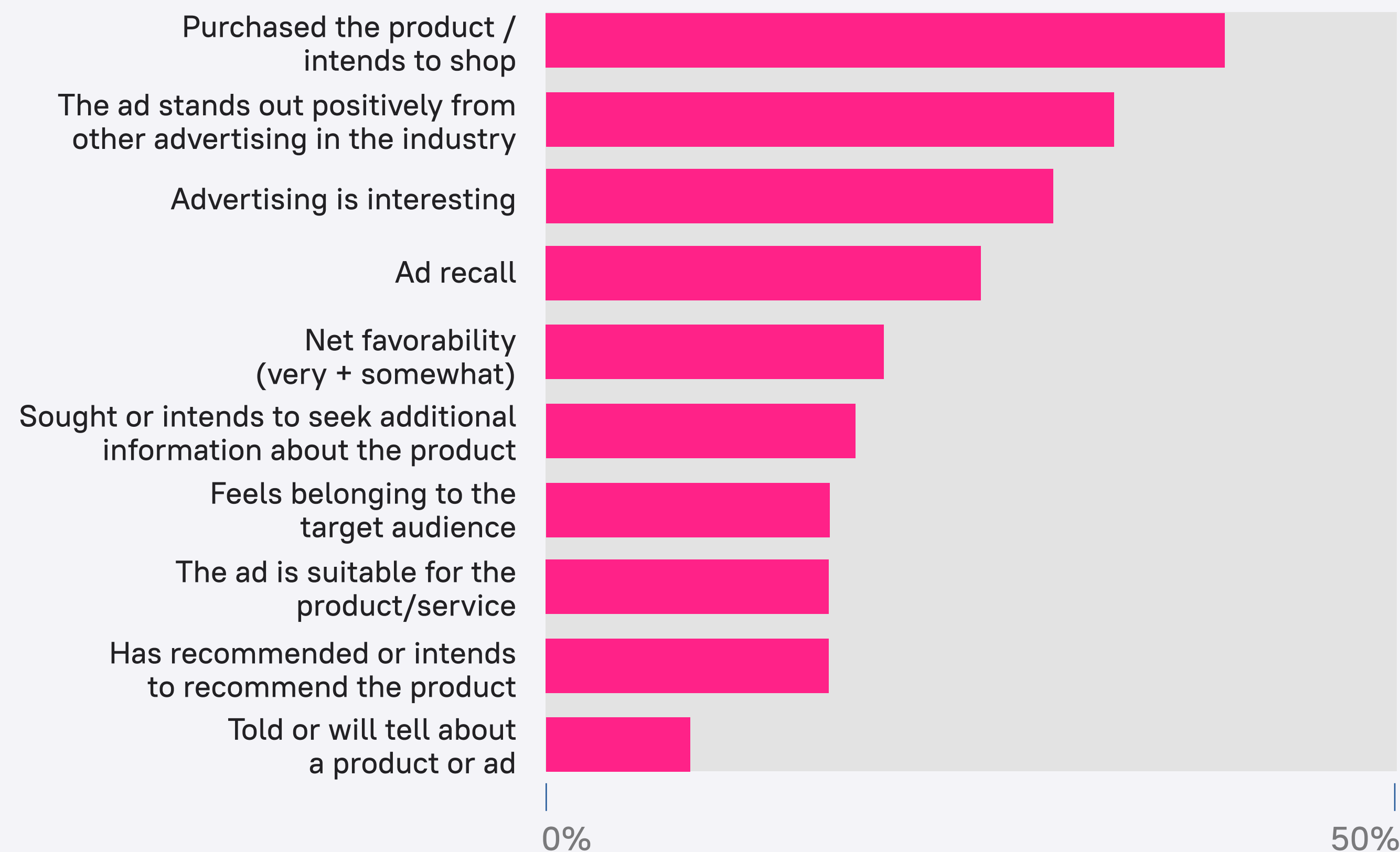
Our brains unconsciously process what we hear all the time.  
Audio makes a difference, even when you wouldn't pay attention to it.



## Many forms of audio advertising

# Audio can be used to address in various ways

Promo vs spot only



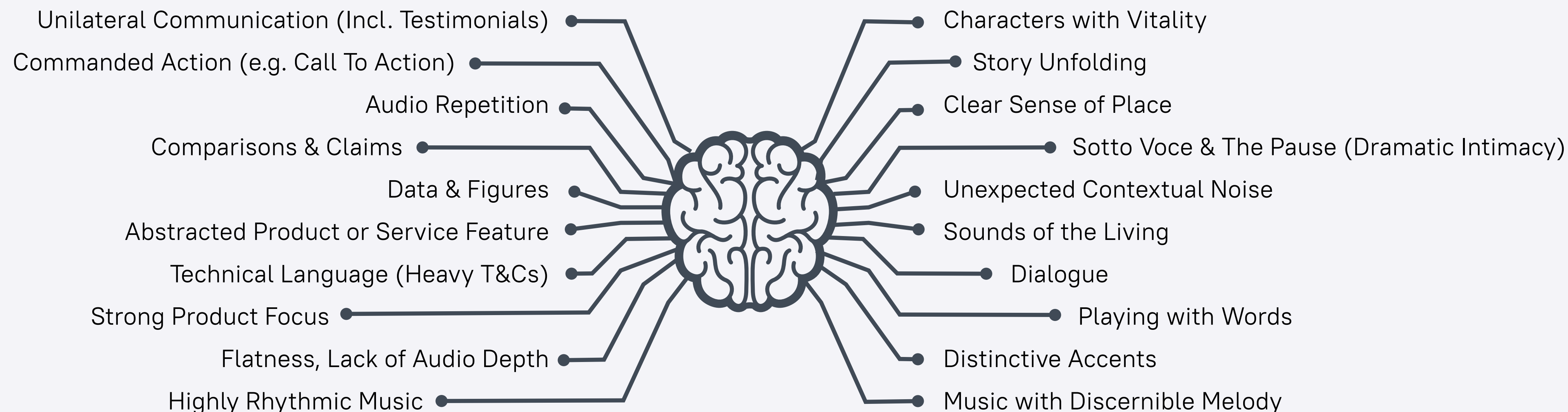
- **Spot advertising** is an effective and fast way to get the message across to a wide audience.
- **Radio** offers versatile specialized solutions, including promotions, program collaborations, podcast partnerships, and dedicated podcast programs
- **Through specialized solutions**, the brand engages 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.

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.



# More results with well-branded audio (ad)

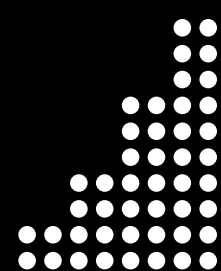
Branding audio advertising improves the effectiveness of **both strategic and tactical** advertising. It has a significant impact on campaign **attention and results**.

**Trust** is at the heart of a strong brand and can be effectively built through audio advertising.

**Consistent** use of sound, recognizable branded advertising and good **creative production** ensure the best results.



# 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 special characteristic of radio advertising is **the opportunity to select the time of advertising on a certain day down to the exact minute**. For an additional fee, the ad can be played at every hour on the hour or between news and the weather.
- It is possible to **buy target group campaigns** from national radio companies from the target groups defined by the radio company.
- Radio companies provide **programme cooperation, promotions** and **other special solutions** in growing your brand and activating listeners.
- **Radio advertising can be purchased also directly or systematically for digital platforms**, such as Supla, Podplay or RadioPlay.

\*KRT, Kansallinen radiotutkimus

5

Finnish  
commercial  
radio holds  
its own  
internationally



Radio Kaleva, photo: Maiju Pohjanheimo

# Of the Nordic countries, Finns listen to the radio the most

Daily minutes of listening to the radio in  
different Nordic countries

Finland 9+



Denmark 12+



Sweden 12+



Norway 12+/10+



In different Nordic countries, radio  
reaches almost as many citizens, daily reach

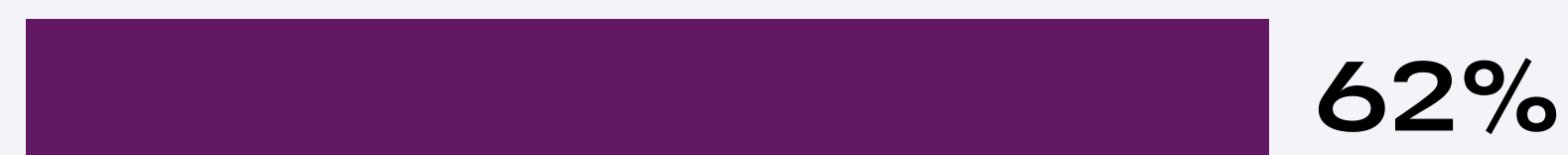
Finland 9+



Denmark 12+



Sweden 12+

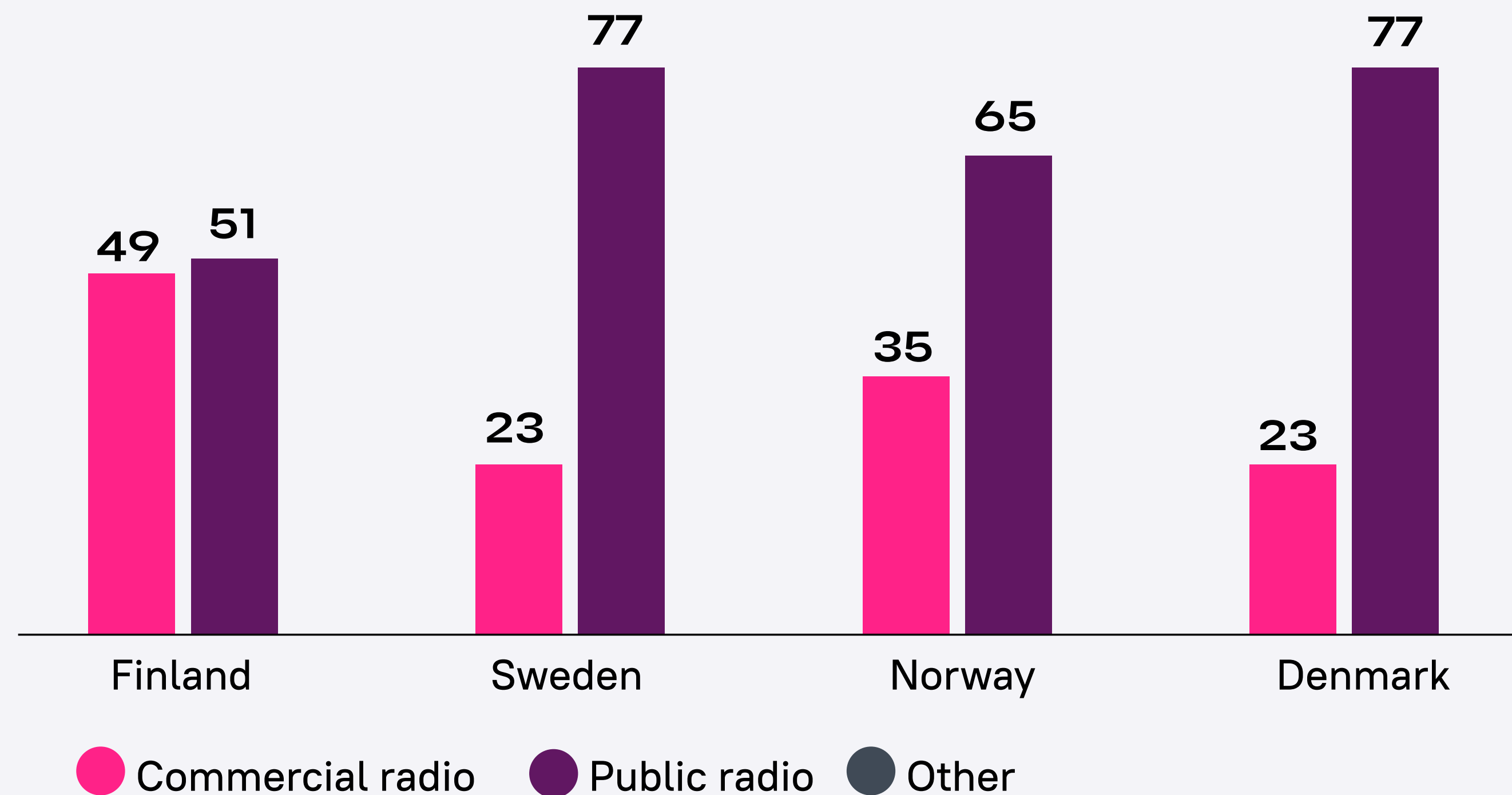


Norway 12+/10+



# Commercial radio is stronger in Finland than elsewhere in the Nordics

2023 share of listening %



Source: Finnpanel/Finland, Kantar/Denmark, Nielsen Media Research/Norway, Kantar Sifo/Sweden.  
Note: Different methodologies have been used in different countries and are therefore not fully comparable.



Radio Nostalgia, Susanna Heikki, Bauer Media

6

Radio is  
the most  
sustainable  
media

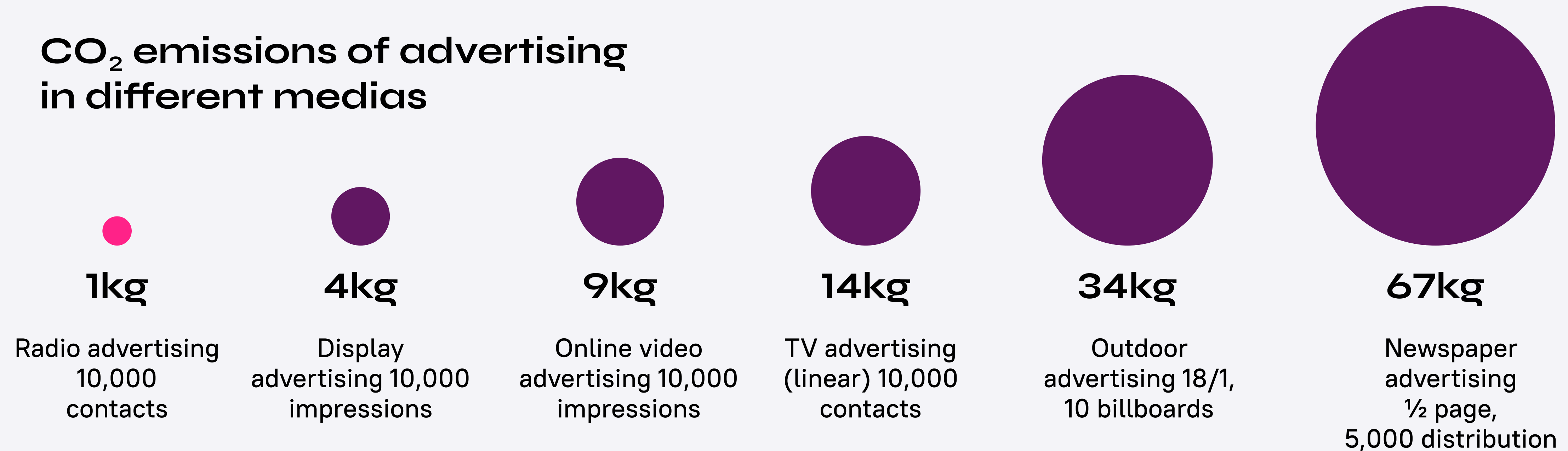


Njassa, Radio Helsinki

# On an airwave of sustainability

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

## CO<sub>2</sub> emissions of advertising in different medias

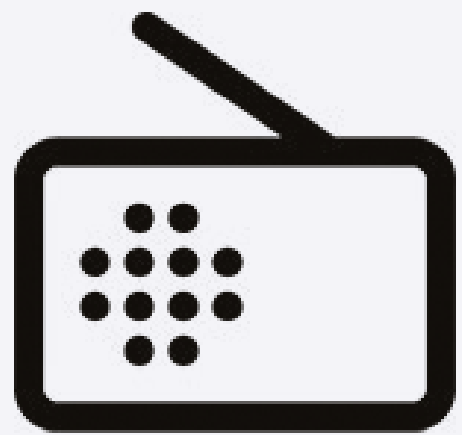


# 7 National Radio Survey



Basso, Hikiinen iltapäivä, Bauer Media

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



18.700 Finns

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

18,700 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 also used in advertising sales and campaign planning**. Campaigns are planned with AudioPlanner.

# RadioMedia

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