

Audio Landscape 2026

Bauer Media Audio



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▶ **Audio investments have long-lasting impacts**

Janne Turunen, Sales Director at Bauer Media Audio

▶ **200,000 new cars could be sold next week**

Kari Tervonen, Roadmap Director, Future Researcher and Consumer Economist at Omnicom

▶ **The sound comes first. Audio is everywhere.**

Katariina Uljas-Ahl, Chief Media Officer at Dagmar

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Ismo Heikkilä, Creative Director at Bauer Media Audio

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Sami Tenkanen, Managing Director at Bauer Media Audio

▶ **Our vision of smooth service**

Sini Kervinen, Director, Tech and Innovations at Bauer Media Audio



Audio investments have long-lasting impacts

Thank you very much for taking some of your valuable time to read our Audio Landscape release! It is an investment that we hope will bring you new ideas, inspiration and perhaps also success in your work and business.

Investing is also a topic that I would like to share a few thoughts on in this foreword. On Finnish Wikipedia, "investment" is simplified as follows: "Investment is usually a commitment that is expected to pay itself back in the long term". However, I find that people more often think that an investment is a commitment that is expected to yield a return on the invested capital either in the long or short term – depending on the size, object and purpose of the investment.

An investment dilemma: timing

Discussions about the timing and necessity of investments very often lead to a dilemma – the need for investments is perceived as immediate, but the possible timing for investments is still somewhere down the line. [Kari Tervonen](#), Roadmap Director, Future Researcher and Consumption Economist at Omnicom, offers excellent insight on how different economic times are, from the marketing perspective, potential times for investment in different needs when you know how to play the game in the long term – in a recession, marketing is a long-term investment that also generates short-term returns at the start of economic growth.



Janne Turunen
Sales Director at Bauer Media Audio



Audio investments have long-lasting impacts

The familiar option is the easy option

Lauri Domnick, Creative Director at BAD Agency, talks about how preference gives a brand an edge over the competition. This edge means directing large cash flows to those brands that have worked to improve their chances of being selected, even in a situation where there was necessarily no immediate benefit to be gained from marketing.

So, congratulations if you have already invested in your marketing during the recession! Economic growth is about to start, and so is the time for reaping the rewards of these investments.

If, on the other hand, you feel that your marketing investment level over the past few years is lacking, now is your time to act.

Where do we invest?

Juha Halmesvaara, Head of Strategy & Insight at Dentsu, highlights the different advertising and marketing indicators – what do we actually buy? What do we actually invest in? When investing in marketing, it is common to see how we aim to get the highest amount of goods possible at a certain investment level – we seek the lowest possible unit price.

We could compare the situation to a stockbroker solely trying to find as many cheap shares as possible. His success would be measured by the number of shares, not the returns.

As the technology used to plan marketing, and in particular media purchases, develops and becomes automated, the value of marketing planning professionals rises high. In the future, when price optimisation can also be carried out in relation to attributes other than the absolute price, other marketing indicators emerge, of which impact is among Juha's favourite topics.



Audio investments have long-lasting impacts

Capturing the sound of the brand

Investing alone will not yield a maximum return if the investment is not tended to across time. Investing is only the first step towards seeking and maximising returns.

Veli-Pekka Ääri, Commercial Director at Tokmanni, writes about the importance of thinking about how your company, product or service sounds.

How you sound is strongly linked to how you feel. And that in turn is linked to whether people choose you.

Katariina Uljas-Ahl, Chief Media Officer at Dagmar, highlights in her speech how good media choices can improve the theoretical chances of success and how too often we lose these opportunities with poor content planning, poor target group understanding and too-small budgets. To add to Katariina's thoughts, in his own speech, **Antti Pehkonen**, Creative Director at Bad Agency, serves an important closing remark on the meaning of content: the quality of creative implementation is the most significant ROI factor in advertising.

Audio deserves more attention

During my 20 years at Bauer Media, I have had the opportunity to experience for myself what investments can really achieve. Bauer Media has grown from a company of three radio channels to Finland's largest audio operator and a pioneer in the audio business. We operate extensively on different fronts of audio and develop the audio industry in terms of different media platforms as well as audio design and technological development. This spring, we will publish a new audio advertising technology, about which **Sini Kervinen** will tell you more in her own content.

Audio deserves more attention – and is worth investing in. This publication is part of our work towards building the future of audio. I hope it will provide you with valuable insights and inspiration. Enjoy our Audio Landscape publication!



200,000 new cars could be sold next week

For several years, I have deemed the economic forecasts of banks overoptimistic and, unfortunately, have been proven right every time. Last autumn, I took a risk and had to admit that I was in agreement with the banks. It was a risk in the sense that a pessimist who turns out to be wrong will never be criticised afterwards, whereas an optimist who is wrong becomes an easy target. Let it be known that I am still in agreement. The economy is heading in the right direction. First, I will try to explain why the picture of economic development is too pessimistic.

Finland has an exceptionally strong culture in giving negative economic signals more weight than positive ones. In the traditional Finnish mindset, pessimism is interpreted as realism and positive development is correspondingly labelled as naive. The folk tradition of this type of negative narrative follows that Finns perceive the general economic situation to be worse than their own economy. Desperate for bleak credibility, even the management of companies will choose their words carefully in public, even if the companies' internal outlook were good and their own operations cautiously optimistic. As a result, the media image of the economy repeatedly lags behind the everyday reality.

The experience of life going in a better direction and feeling like you are doing better now than last year is the key to better economic development and willingness to invest of nations.

The feeling of growth fuels growth and, despite every attempt to uphold bleak dispositions, the economic situation is heading in a more positive direction.



Kari Tervonen

Roadmap Director, Future Researcher
and Consumer Economist at Omnicom



200,000 new cars could be sold next week

The changed image of consumption

It is worth noting that the image of consumption has changed, which has also led to structural changes in the GDP. Consumption has partially shifted from goods to services, from ownership to use and from one-off purchases to continuous consumption. In addition to the short-term, the service-oriented approach also has a stabilising effect on demand in the long term, which means that a decrease in consumption is less likely with this structure.

Construction and the related industries are unquestionably in genuine difficulties, but this situation excessively blurs the overall picture of the economy. Political decisions in the 2010s overheated housing construction, and we are now paying for this rather irresponsible short-term stimulus policy. While housing construction continues to decline, many service categories are developing fairly well. It is easy to blame a company's difficulties on weak demand, when the reality is that the company's outdated range of services no longer serves the market.

Rise from the financial downturn

The outlook for industry is improving in the short term, and there is potential for even strong long-term growth. Even in a customs war situation, Finland can gain a relatively large competitive edge within Europe by investing boldly in energy infrastructure and our genuine strengths, such as the energy-intensive processing industry, critical digital infrastructure, industrial automation, batteries, chemical production and the electrified process industry. However, it would be wise not to invest too much in the kind of discrete production where we cannot compete against China.

The pursuit of prosperity should come back into fashion

Ultimately, Finland's success depends very much on our own will and diligence, whatever the circumstances. Finland is well positioned to be Europe's number one in economic growth in a couple of years' time, even if we are in last place now.

International estimates also show that Northern European countries have the most positive long-term growth opportunities out of all European countries. The problem is that too few of us know to pursue them in earnest.



200,000 new cars could be sold next week

Marketing turns from expenditure to a competitive advantage

From the point of view of building a brand, the most cost-effective time is in the middle of a recession, but in performance marketing, it is right at the start of economic growth. The economy is turning around, but the mood and behaviour remain cautious. We are in a situation where marketing is turning from expenditure and investment into the fastest-realizable competitive advantage in sales.

Marketing measures are used to gather audiences, build memory traces and guide the decision-making path in advance. When willingness to buy is mobilised into purchases, the winner is the brand that is already on your mind.

The productivity of marketing improves, especially in the sale of expensive durable consumables, as consumers' purchasing needs have built up, there is already purchasing power in store and only the timing of purchase is still open. The consumer and buyer are looking for signals and answers to the question of which company to trust and whose products they really want.

A brand perceived as good increases average consumer spending per category by approximately 30%.

As an extreme example, there are currently several hundred thousand people in Finland who could afford to buy a new car next week if only a car brand could get them excited enough.

The average Finnish company only invests in marketing roughly half of the calculated recommendation. I can promise that you will be met with a deep silence at speaking events if you ask for cases to add to the extremely slim book of "Finnish companies who fell into financial hardship for investing too much in marketing". The good thing is that, in Finland, above-average efforts in marketing produce exceptionally good results. And, in 2026, not only in the long term, but also in the short term. In January 2026, consumption already increased from the previous year.



The sound comes first. Audio is everywhere.

Total Audio's greatest potential lies in its holistic nature

We follow listeners throughout the day, guide them from one individual interface to another through sound, build a coherent audio brand experience and ensure our own recognisable share of ear in the day of the listeners. Great! No, that's just nonsense.

The biggest weakness of today's Total Audio is that we really think it is "total". It is not. Today, Total Audio is basically another name for a package that is easy to sell and easy to buy. Flavours for every occasion, like Bertie Bott's Every Flavour Beans from Harry Potter; with FM on the bottom, digital audio in the middle and Retail Audio sprinkled on top. A desperate package to respond to the demand for efficiency in a fragmented audio environment. If you're lucky, you could even succeed.

By purchasing the Total Audio package, we have the theoretical opportunity for massive reach, high attention value and diverse encounters.

However, the truth is that too many of us continue to miss out on the best of Total Audio due to poor planning, lacking target group understanding and too small budgets.



Katariina Uljas-Ahl
Chief Media Officer at Dagmar



The sound comes first. Audio is everywhere.

Audio needs a strategy

There is a huge potential in Total Audio thinking and purchasing when it is based on goals rather than a package. Total Audio requires a clear audio strategy that accounts for the brand and target groups, a recognisable sound, channel-specific roles and implementations as well as the ability to make use of the best aspects of the different audio channels, also in terms of content.

Traditional radio has its own strengths, and digital channels enable a more personal, even intimate approach and connection to time and place, listening moments and content. When listening to a radio receiver, you can get away with repetitions, but on headphones, the same repeated advertisement will exceed the irritation threshold in a heartbeat. The same message that works in podcasts does not necessarily work in a retail environment, and vice versa. Hyper-local advertising at gyms can be a good idea, but in the golden age of headphones, does the environment guarantee listening?

Audio yields more profits

Total Audio is not a package; when used correctly, it is an effective way to build the brand and sales. You could start from here: devise a long-term audio strategy and create a clear audio brand, adapt creative executions to different environments, control repetition levels, ensure coverage, dare to experiment, be patient with measurements and do not for one second imagine you can get more for less.

Audio deserves more because sound also has the last say.



The sound makes the brand charismatic

Many brands still lack an audio brand book. Once readers have become viewers and listeners, it is worth getting the sound world under control ASAP.

How your company, product or service sounds is at least as important as how you look. How you feel is strongly related to how you sound.

Charisma comes down to three things that multiply the effect of the others: competence, drive and personality.

Grab your designers by the hand and go through exercises on what kind of soundscape supports the customer experience and emotional connection. Decide on your company's common tune, but also discuss the details. It is the same thing as how the makers of a Mercedes know how a closing door should sound. Audio is a game of details – not just music. Social media is full of sounds; part of the digital path could be richer in audio. Your service could have an audible thank-you, instead of a written one. I challenge all of us to pursue this type of creativity.

Service design with audio is likely to be a topic of discussion in the near future.

People block out new messages, but audio penetrates that guard. Our sense of smell, taste and hearing evolved for the savannah, and they remain that way to this day. When you use sound, your message comes through.

Take care – and listen.



Veli-Pekka Ääri
Commercial Director at Tokmanni



Audio is better than it is given credit for

The effectiveness and efficiency of marketing are ongoing topics of discussion. The marketer and the shareholder have a common goal: to get the best possible return on investment.

The ROMI requirement has not eased in recent years. This is where a decisive mistake is often made: optimising percentages instead of total euros and over-investing in advertising that generates short-term sales.

Scientific research in marketing has consistently shown (yes, marketing is based on science, not opinions) that emotional advertising produces results in both the long and short term. The word *both* is essential here. Imaginative, brand-building advertising creates future demand and increases immediate sales. Alongside it, activating, tactical advertising is also important, and Finns are already surprisingly good at this. That is why I will be focusing on how to build future demand.



Juha Halmesvaara
Head of Strategy & Insight at Dentsu



Audio is better than it is given credit for

Future demand comes from awareness and long-term efforts

Creating a memory trace requires two things from the media: attention and sufficiently long exposure.

- 1.** A quick glance or skip is not enough. According to research by Dentsu and other operators in the field, long-term attention can be built in a scalable manner with two format types: audio and video spots. The average attention time for other formats is around two seconds, which is not enough to change perceptions.
- 2.** In addition, the activity must be long-term and widely reach potential clients. Not a single three-week campaign, but repeated activity throughout the year. This is where audio shines: its cost-effectiveness enables a long-term presence – assuming, of course, that your target group has ears.

The facts speak for audio, but the budgets do not

When scientific research, sales modelling, media mathematics and campaign measurements speak for audio, it is difficult to understand why audio still only accounts for less than 10% of the figurative media pie. Especially when we know that audio enhances almost every media package to which it is added. On the other hand, maybe that is an advantage for us.

While some of us will chase after the latest craze, growth is easier for those who use tried and true channels. It is worth trying new things, but at the same time, it is worth holding on to channels that generate results year after year.

Too many people leave effective means of growth untapped, citing reasons like “I myself don’t listen” or “our concept doesn’t translate to audio”. The basic rule of marketing is still the same: you are not your target group. It is time to look at the market, not in the mirror, and listen to the facts instead of opinions. Finland needs growth, and audio is significantly better for producing growth than it is given credit for.



The advertiser's dilemma

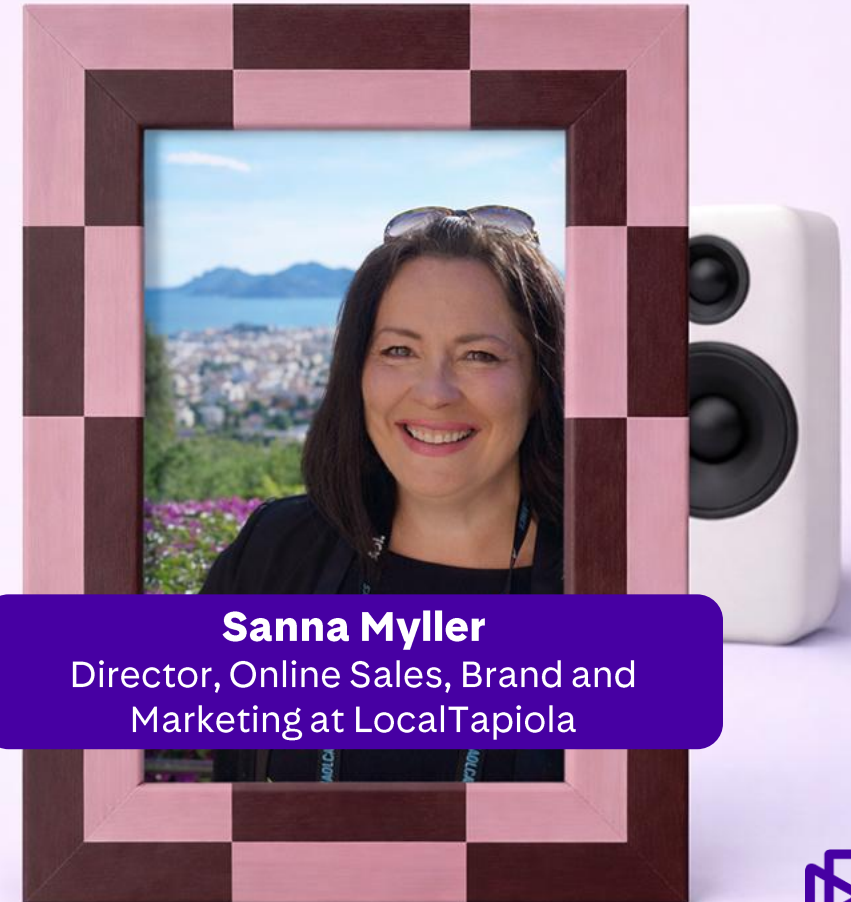
I still remember the question I posed years ago before the panel of the annual Radiovuositilaisuus event, and especially the answer I received. I asked the author and soul of the *Tiedetrippi* science podcast, **Henry Tikkanen**, if he can think of a podcast made by a commercial operator that has achieved success. He gave it some thought, but he still only needed a few seconds: *NO*.

I still think about it, and it should become my own professional mission in audio production.

Why is there such a conflict in how passionately my daughter loves to listen to music or my son to a sports podcast? And why does the popular *Sijoituskästi* investment podcast, where the business area of the company that I represent is at the core, not manage to create the same, or even a similar, level of excitement in me as an advertiser?

In audio, is my format always just a disturbance, a quick word from the sponsor or a ransom within one's own listening world?

Does this take more time or money, or is it so that, as a commercial player, I do not dare to use and plough the difficult initial phases and to "ROMI-fy" poor figures? Am I simply unable to find content that does not speak to the advertiser's need?



Sanna Myller

Director, Online Sales, Brand and Marketing at LocalTapiola



The advertiser's dilemma

Advertisers and creative agencies have big souls, those riding the waves of industry trends and bold visionaries, but even more delicious formats are the radio stations' own channel promos and the cream of the crop in podcasts, where the top talent have managed to make audio multi-channel in nature, even winning awards, for example, thanks to Viki and Köpi's decade of work (or bold eccentricity), as we witnessed at the Golden Venla Gala.

But I, the advertiser. Stuck.

Am I incapable of removing the corporate label from something that interests the consumer?

Am I simply unable to find sufficient time or can I no longer experience passion through content within the company walls? Can I find a new format and content that would have value? This week, I am listening to live interviews about a client's life, i.e. doing ethnography. I will likely hear how tucked away and hidden in small moments our products and services are in your everyday life when it runs smoothly.

How could I become worthy of people's time?

In everyday life and in audio, what is a relevant way of channelling commercial intensity and preference for an advertiser? To find my way into people's everyday life and listening, to establish a connection. Audio is enchanting people in many ways right now, but my commercial voice seems to be gone somewhat. Well, just as a cold passes...

Finally, as is customary in the industry I represent, a disclaimer; this is not intended to criticise advertisers, the media, media agencies, creative agencies or commercial or non-commercial operators. The reflections are my own and describe my inner turmoil.



The audio market is booming

In recent years, the audio market has been fighting an uphill battle. While the media environment has become fragmented and the overall investments in Finnish media advertising have decreased, audio has retained its strong position and strengthened its role as part of the everyday life of Finns. In 2025, audio reached more than 90 per cent of Finns every week and accounted for a significant proportion of daily media use.

FM radio is the most accessible audio medium. Digital audio has made listening more diverse and has grown steadily, bringing additional reach to audio, especially among target groups of working age.

The results of audio advertising have strengthened: attention value and ROMI have developed positively.

The development of 2025 is also characterised by the expansion of audio into new environments. Radio and digital audio alone do not represent the audio market; Retail Audio has grown alongside it, bringing audio closer to the point of purchase, strengthening the role of audio throughout the client journey – from awareness to consideration and activation.

The Audio Market Review compiles current information on the state, consumption, advertising investments and effectiveness of the audio market. I want to offer an overall view of the market, which has become an even more strategic part of the whole of the media.

Audio is everywhere, and in 2025, it was also more multi-channel in nature, more measurable and closer to the purchase decision than ever before.



Maria Lehto

Data & Insight Strategist
at Bauer Media Audio



Audio market outlook 2026



+32%

of advertisers seek growth and increase their marketing, half are maintaining the current level



+20%

More than a third of advertisers use radio, and one in five plan to grow the share or try it



+20%

Around one in four advertisers use digital audio, and one in five plan to grow the share or try it



+11%

One in five advertisers use retail media, and around one in ten plan to grow the share or try it

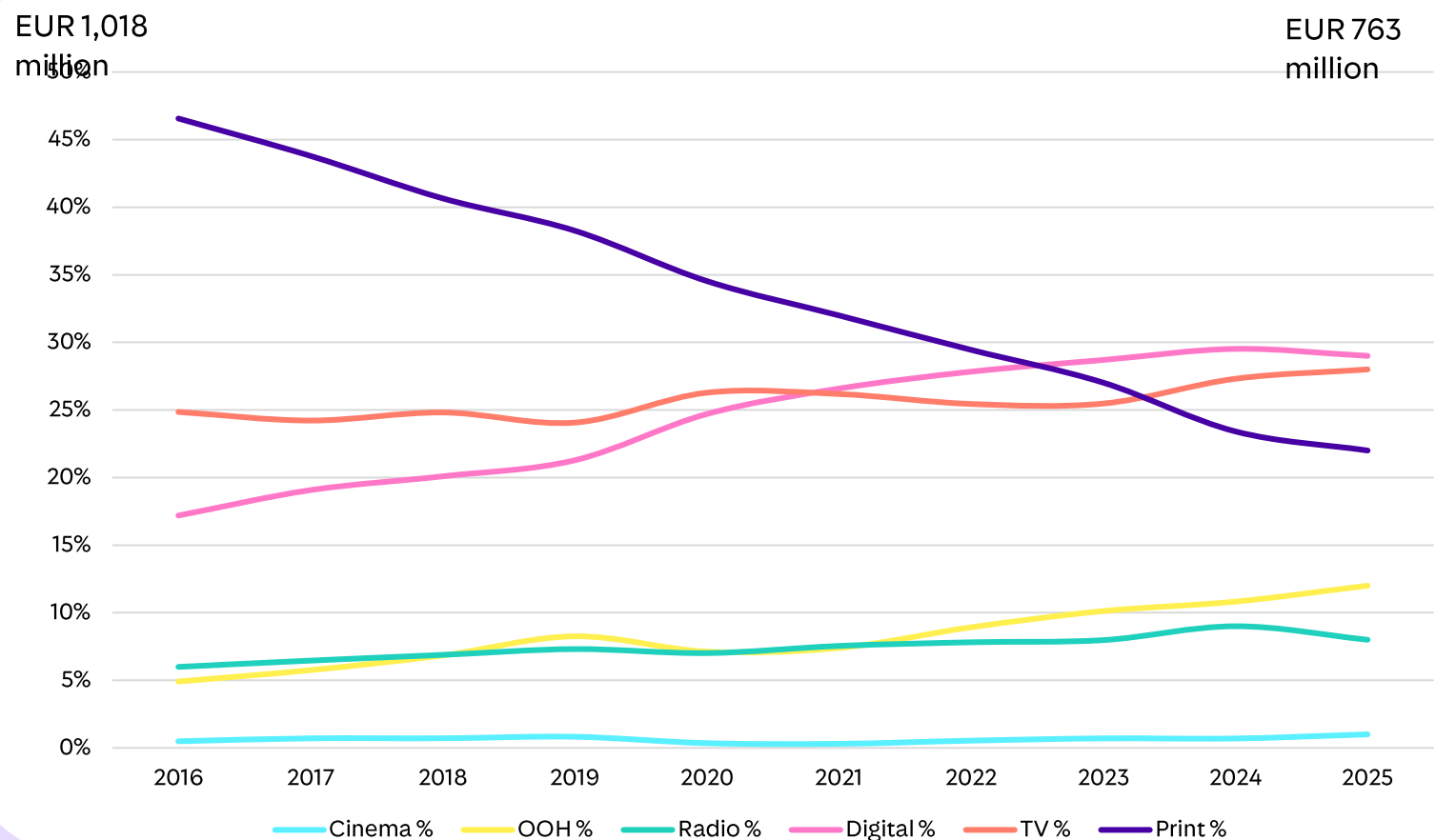


+37%

More than a third of advertisers use influencer marketing, and more than a third intend to grow the share or try it



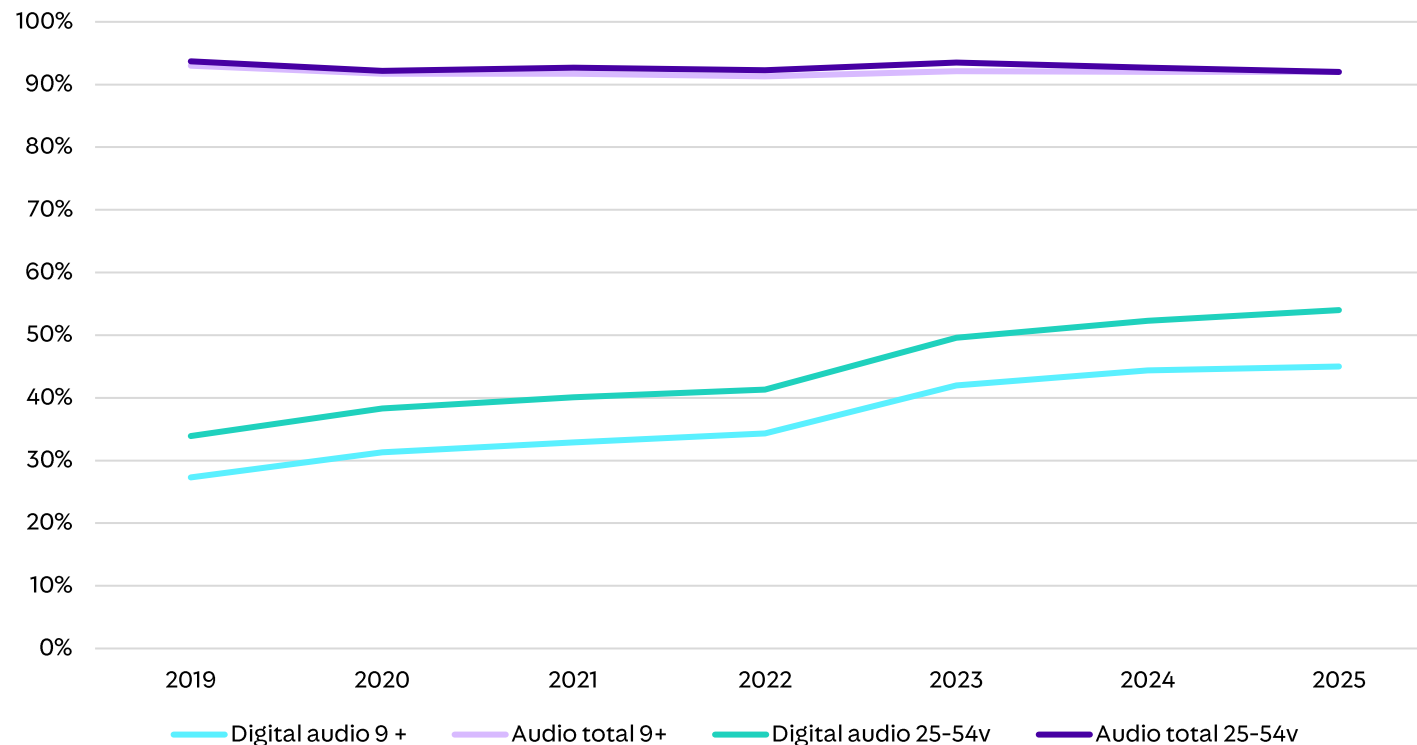
Advertising investments in Finnish media have decreased – radio's share of investments has grown



- ▶ In 10 years, investments in Finnish media have decreased from EUR 1,018 million to EUR 763 million (-EUR 255 million)
- ▶ Investments have shifted from domestic media to foreign giants: in 2025, as much as 40% of all advertising investments (EUR 497 million) went to social media and keyword advertising
- ▶ The share of radio has increased steadily from 6 per cent to 9 per cent
- ▶ Due to the increase in advertising investments in radio and audio and more long-term-oriented planning, the attention value, impact and ROMI of audio advertising have developed positively



Audio reaches more than 90% of Finns



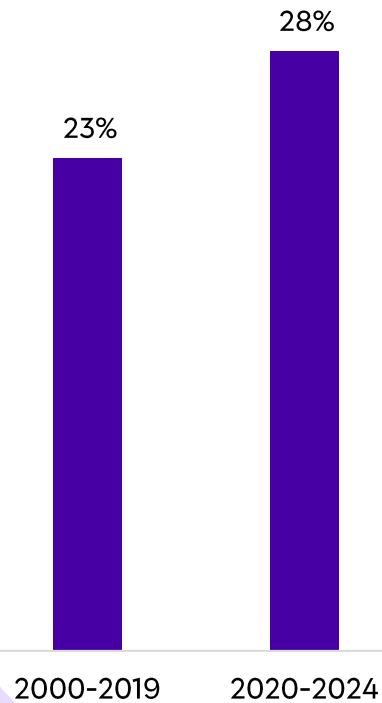
- ▶ Audio reaches almost the entire population
- ▶ The reach of digital audio is growing rapidly both among the entire population and especially among 25–54-year-olds
- ▶ The significance of digital audio increases every year. It complements the reach of FM radio especially among the younger target group

Source: Finnpanel KRT 2019–2025. Digital audio covers the listening of online radio, music, podcasts and radio programme recordings on domestic and foreign platforms.

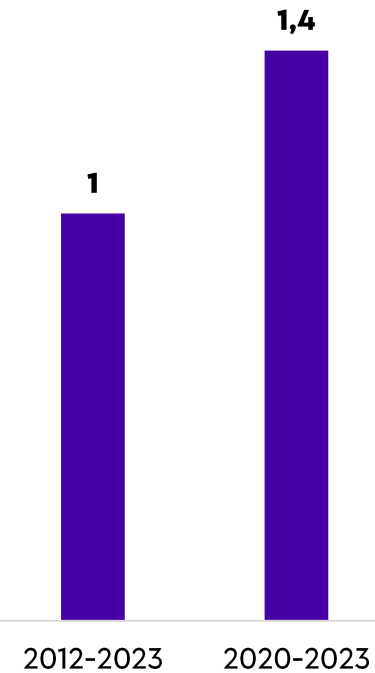


The results of audio advertising are growing rapidly

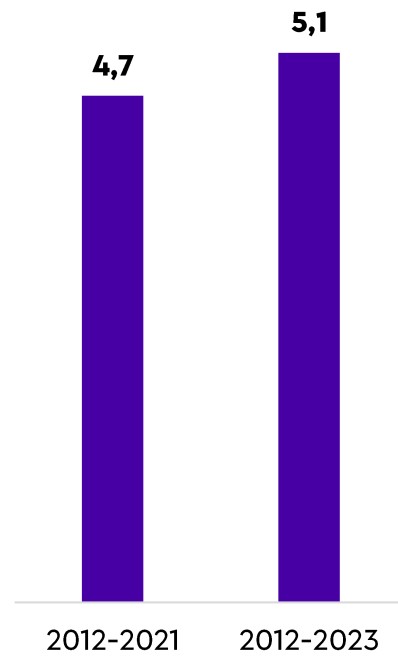
Attention value of audio advertising



Half-life of audio advertising (weeks)



ROMI of audio advertising



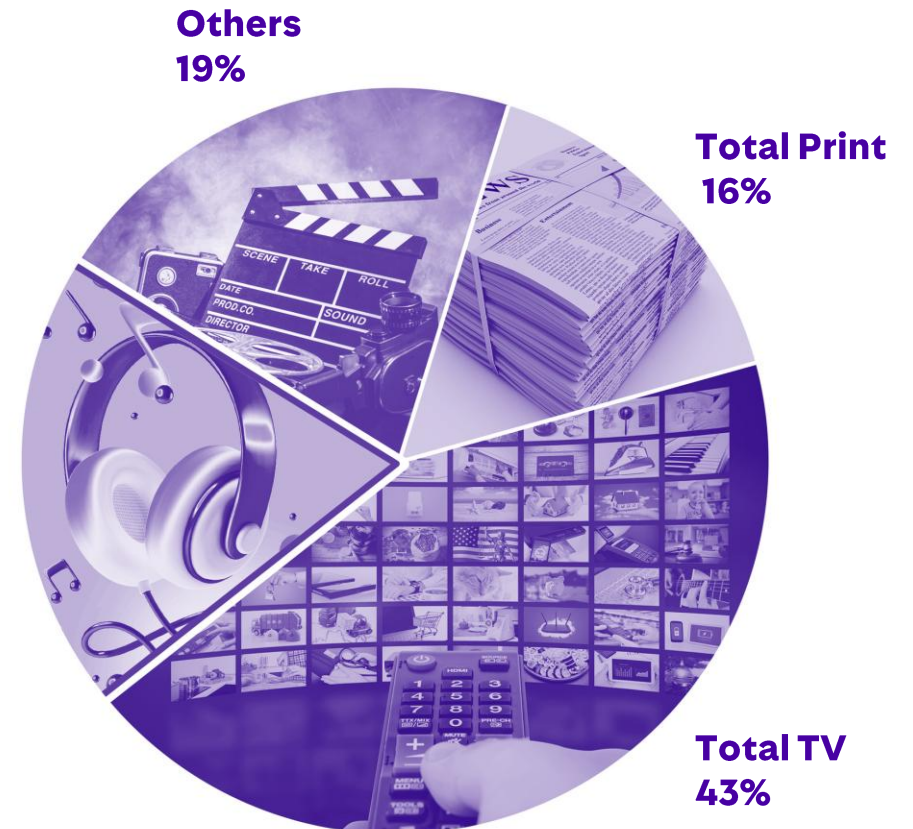
- ▶ In the 2020s, the results of audio advertising have grown significantly
 - ▶ attention value (28%) is the second best out of the different types of media after TV advertising
 - ▶ the half-life is the highest out of all media. The half-life is 1.4 weeks, after which the effect of advertising on sales or website traffic is halved
 - ▶ ROMI 5.1 is the best out of offline media types
- ▶ The strengthening results of audio advertising have been influenced by higher-quality advertising content and the more prevalent use of Audio Branding, among other factors. Audio is also used in advertising in a more long-term and strategic way.
- ▶ The increase in the share of advertising investments in audio has clear positive effects, particularly on attention value and ROMI



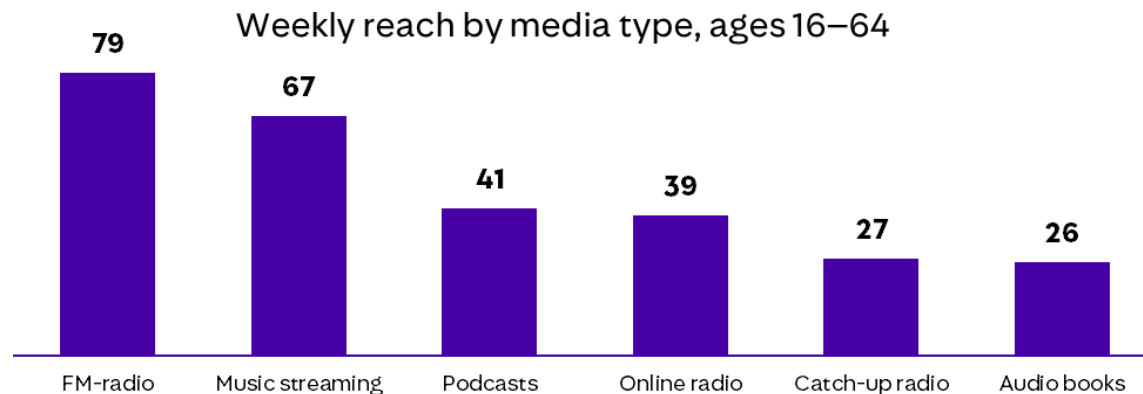
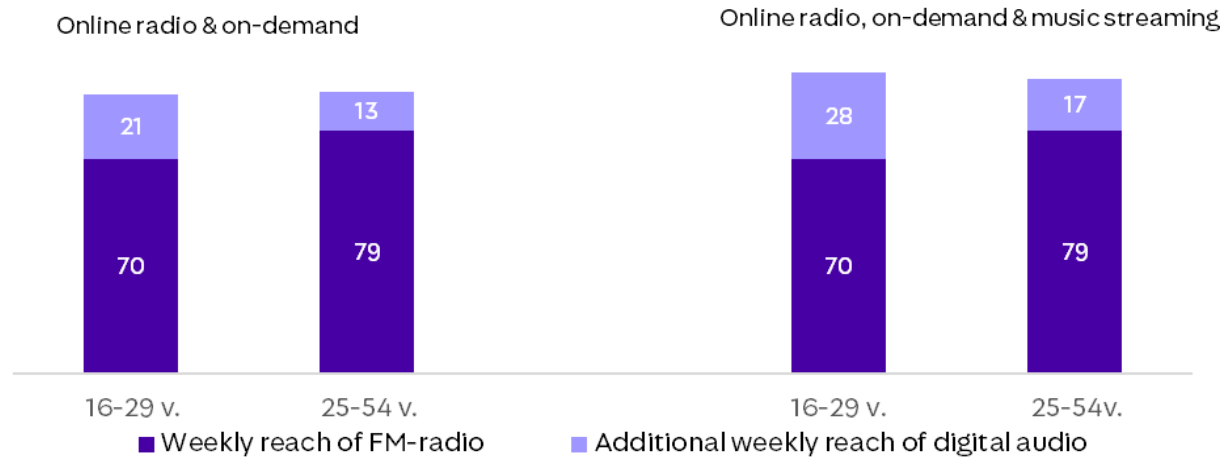
22% of the media day of a Finn was spent on audio

- ▶ In 2024, on an average day, Finns spent almost 9 hours and 15 minutes on various media
- ▶ More than one fifth of the media day was spent on audio media
 - ▶ For audio services, the most time was spent on listening to the radio during broadcast hours (FM radio and online radio), accounting for 64%
 - ▶ Digital audio services accounted for 50% of Total Audio consumption
- ▶ Digital audio media include online radio, audio and podcast services and music streaming services

**Total Audio
22%**



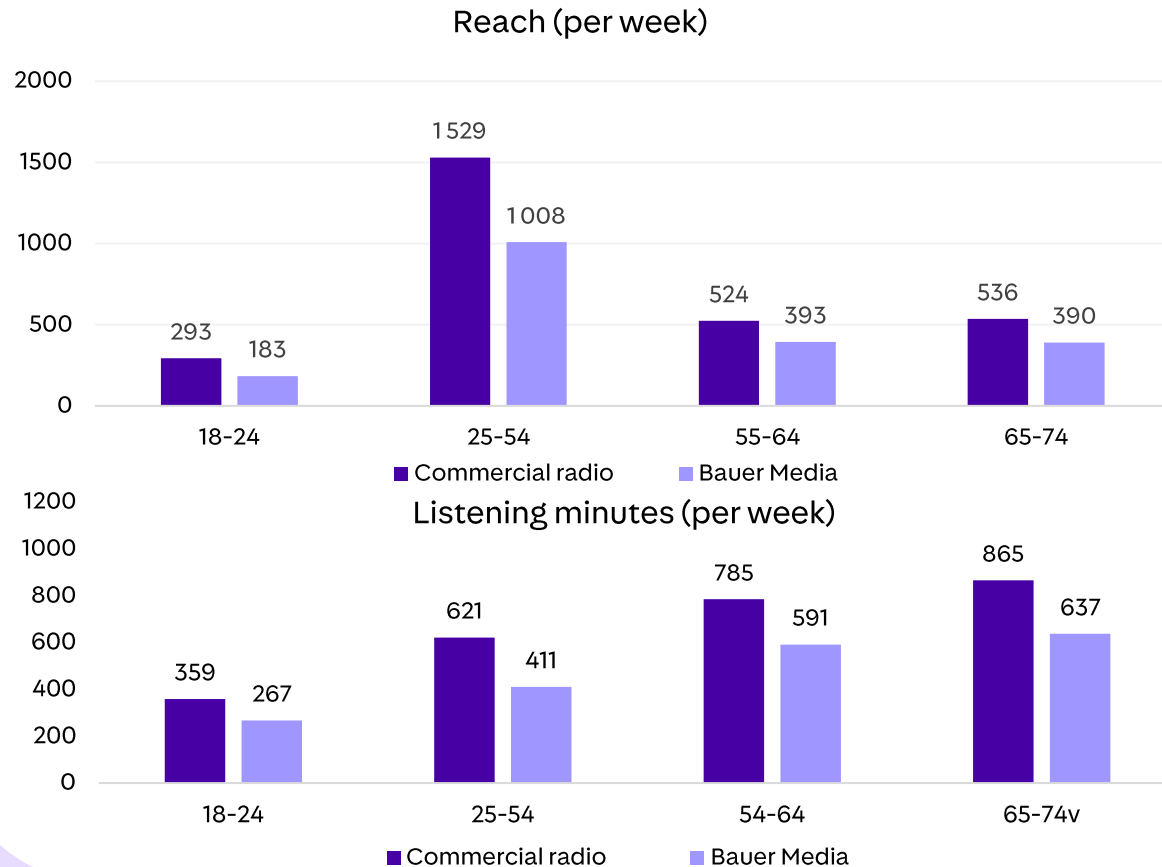
Listening to digital audio increases the reach of FM radio



- ▶ “This is how Finns listen 2024” survey conducted by IAB and Nepa also investigated the consumption of digital audio
- ▶ Audio reaches people through multiple channels and adapts to different listening habits and needs
- ▶ FM radio has the largest reach out of all audio media, while music streaming has the second largest reach. The reach of podcasts and web radio stations is stable
- ▶ The additional reach of internet radio, on-demand content (podcasts and recordings of radio programmes) and music is already significant for FM radio, especially among the younger target group



Commercial radio has a high reach in all age groups



- ▶ Commercial radio is excellent in reaching Finns
- ▶ Reach of commercial radio (per week)
 - ▶ 66% of Finns (9+)
 - ▶ 72% of 25–54-year-olds
- ▶ People spend a long time listening to commercial radio. The long listening times enhance the reach and impact of advertising

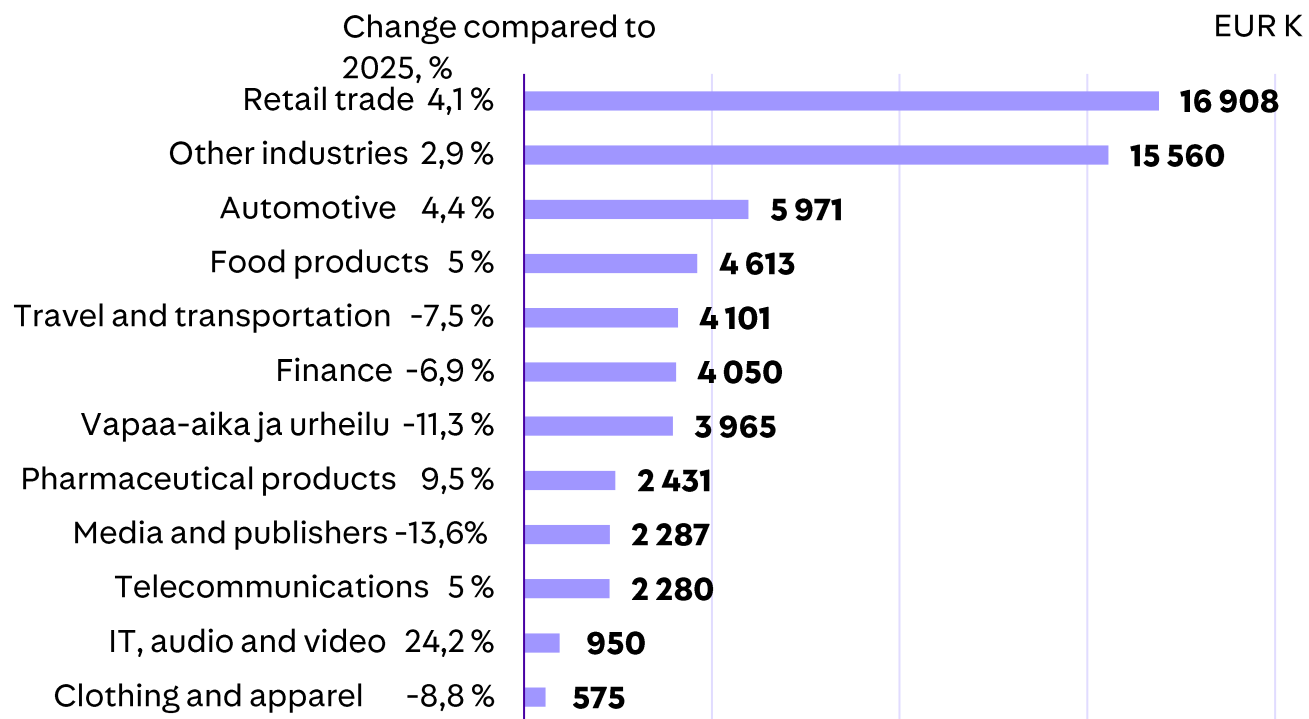
Time spent listening to commercial radio (per week)

- ▶ All Finns 10 h 52 min (9+)
- ▶ 25–54-year-olds 10 h 21 min



Investments in the domestic media market decreased by 3%, the decrease in audio advertising investments was smaller, at 1%

▶ Investments in radio advertising by industry in 2025



The year was challenging for advertising, and the market declined for the third year in a row, which also affected investments in audio advertising.

- ▶ Investments in Total Radio amounted to EUR 68.4 million in 2025
- ▶ The share of FM radio advertising was EUR 63.9 million, and the share of digital advertising was EUR 4.5 million
- ▶ The percentage of radio advertising in Finnish media advertising was 9%
- ▶ In media marketing including search engine and social media advertising, the share of radio advertising was 5%

*Total Radio includes FM radio advertising and digital advertising sold by radio stations.



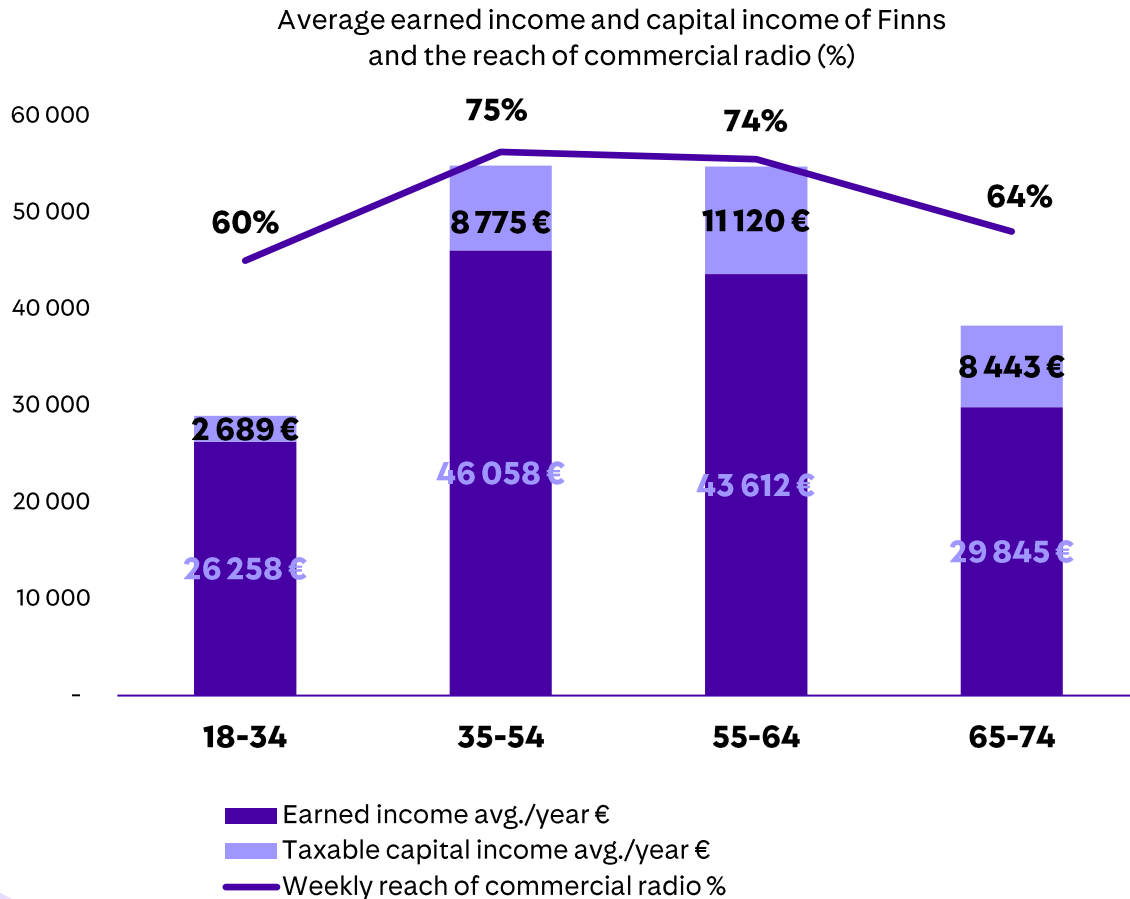
Industries that invested in audio advertising significantly more than the average

In 2025, seven industries invested in audio advertising significantly more than the average.
Industries and share of audio advertising in media advertising:

13%	Travel and traffic
13%	IT, audio and video
11%	Financial sector
10%	Leisure and sports
10%	Teleservices
10%	Cars
10%	Media and publishers



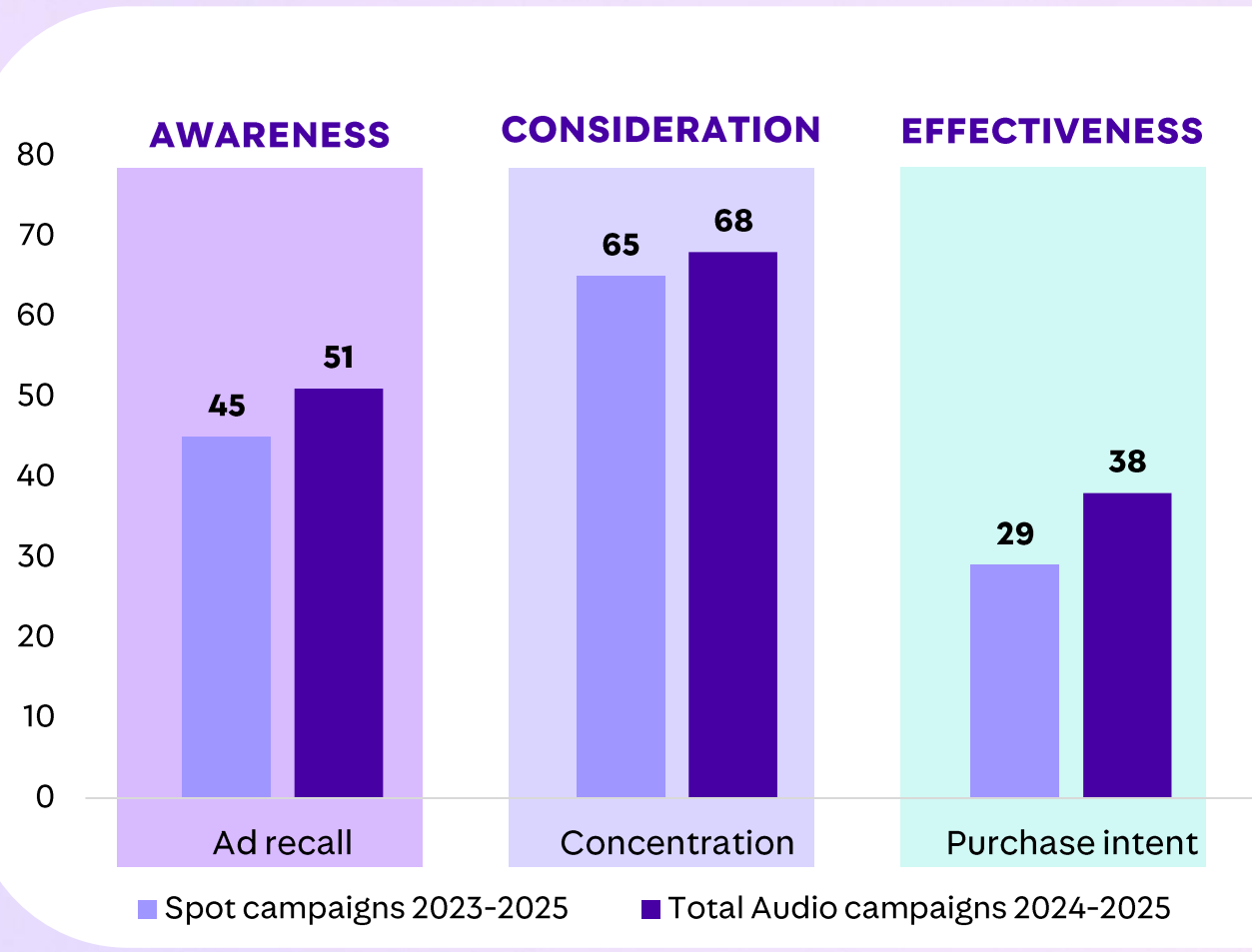
Commercial radio has a massive reach among the age groups with the most consumption power



- ▶ According to the Tax Administration's earned income and capital income report for 2024, the age groups with the most consumption power are 35–54--year-olds and 55–64--year-olds
- ▶ Commercial radio has excellent coverage among these groups with the most consumption power
- ▶ When wealth is also taken into account, the wealthiest are those over the age of 55, with a median net wealth of EUR 180,000 per person. For 35–44-year-olds, the median net wealth is EUR 66,000, and for 45–54-year-olds, it is EUR 151,000



Advertising in Bauer Media's Total Audio networks is noticed and has an effective impact on the purchasing path



- ▶ Bauer Media's Total Audio comprises radio, digital audio and Retail Audio
- ▶ The median results of Total Audio campaigns are better in post-measurement studies than the median results of other spot campaigns:
 - ▶ **Attention value: +13%**
 - ▶ Total Audio's diverse interfaces increase advertising reach and attention value
 - ▶ **Concentration: +5%**
 - ▶ Audio advertising catches the listener's attention, and digital audio in particular enables focused and undisturbed listening
 - ▶ **Purchase intent: +31%**
 - ▶ Audio advertising is effective due to its high attention value and consideration. The strength of Retail Audio is that people hear the message close to the point of purchase
- ▶ With Retail Audio, the audio market has evolved towards a more multi-channel and situational media that
 - ▶ works throughout the client journey
 - ▶ is scalable to different environments
 - ▶ combines brand impact and the point of purchase

Source: RAM attention value and impact studies 1/23–12/25, number of spot campaigns studied: 215
Number of Total Audio campaigns studied: 29



The internet of the new era

Have you heard of the dead internet theory?

According to it, the internet is increasingly full of AI-generated content and there is less real interaction between people than before.

We are living in a time of rapid change, where the importance of context is emphasised and reaching the right human contacts is more valuable than ever. Mental availability is key.

More content is being created than ever before. More than half of new content uploaded to the Internet is AI-generated (Graphite, 2025), and in 2025, AI-generated news content exceeded the amount of human-generated content. At the same time, people still have the same 24 hours in a day. According to the wildest claims, up to 56% of digital advertising impressions never reach humans (Ahrefs, 2025).

How can an advertiser make it in the era of content noise and AI slop?



Laura Björkskog

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The internet of the new era

Sticky Entertainment supports mental availability

An advertiser can strengthen their mental availability by favouring formats that leave an impression. However, there is surprisingly little talk about the balance between media choices.

In 2026, will we live in a world where people have eyes but no ears?

The so-called Sticky Entertainment works. Infectious content attracts the attention of the audience and engages them with it.

Audio is particularly effective in this, as it activates the entire limbic system, challenging us to use our imagination.

What kind of digital advertisement can capture our undivided attention if only for a few seconds?

Not many can. That is why digital audio advertising is an interesting exception.

Audio plays a special role in an era where much of the content on the internet is hastily produced and easy to skip. Sound awakens emotions, leaves an impression and activates emotional memories. It speeds up brand recognition and improves the effectiveness of advertising.



Retail Audio – a decisive factor at the point of purchase

Audio works best when it is used in a diverse way on all platforms, as part of a coherent whole. This multiplies the impact of audio. Launched as the first of its kind at the European scale on the Finnish market, Retail Audio has proven its effectiveness in an audio campaign.

“Our research showed that a major food advertiser’s audio campaign with Retail Audio had a 30% higher activation impact than other campaign media. The net reach and attention value increased significantly.”

Arja Suominen, Media Investment Director at Dagmar

Our Total Audio survey (Q4/2025) also showed encouraging results in a very different industry.

“The memory traces and impact of audio advertising are particularly high. Also in the retail environment, where the advertiser recognition rate was 76% and purchase intent 50%.”

Isko Lappalainen, Head of Brand & Marketing at Oomi

Sources: RAM, Attention value and impact survey, 10/2025, clients’ own data & brand tracking



Outi Hilakari

Head of Retail Audio at
Bauer Media Audio



Retail Audio – a decisive factor at the point of purchase

Audio brings the brand to mind at the point of purchase

A special strength of retail media lies in the connection of brands and consumers in purchasing environments. Retail Audio brings the voice of the brand directly to the moments when something is needed and strengthens the brand's memorability.

The buyer's autopilot mode is interrupted when sound evokes the brand at the time of purchase.

Our Total Audio research confirms Retail Audio's diverse role in audio strategy. The sound makes the brand stand out and directs the impact of the campaign to your own brand instead of the category, whether the product can be purchased directly from the store shelf or not.

Retail media is growing rapidly in Finland and Europe

Retail media is one of the fastest growing and developing areas of the media and advertising market in both Finland and around the world. IAB Europe forecasts the value of the retail media market to exceed EUR 31 billion in 2028. According to estimates, advertisers' investments in retail media in Finland are growing at a rate of 15–20 per cent, at the same pace as the international market.

Bauer Media's Retail Audio network is the only one of its kind in Europe, reaching 2.6 million Finns every week. Retail Audio complements the impact of radio and digital audio at the end of the client journey, increasing the contextual relevance and timing impact of advertising.



Brands compete in memory traces

There is a persistent (and partly researched) idea in marketing: most brand decisions are made on the shop shelf. That is where the products meet and the decisive battle takes place. However, most of the time, only the last, almost unnoticed nod occurs on the shelf. The shelf is more akin to a memory test than a battlefield. When a person stops to choose a product, the actual game has often been played in the weeks, months or even years leading up to it. Above all, the competition is about a place in memory.

The decision process starts long before the moment of purchase

Already before the consumer enters a store, opens an app or starts considering a purchase, a huge amount of brand signals and messages have accumulated in their mind: sounds, colours, experiences and encounters. They create a sense of familiarity. What is familiar is perceived as safe. A safe option feels like an easy one. And people will choose the easy option.

Most people are not looking for the perfect option; they want a solution that is good enough and does not overload their brain. When a brand quickly comes to mind and feels familiar, the choice happens almost automatically. A brand that people forget rarely ends up in the shopping cart. This means that the actual competition takes place already before the point of purchase.





Brands compete in memory traces

Preference is a subtle tipping of the scales

A common explanation behind the strength of brands is loyalty, even though everyday consumption is surprisingly routine-based. Few people consciously think of always buying the same brand. It is much more common that they simply choose something they already know. Preference is a small edge, a slight bias that affects the likelihood of a choice. However, it is precisely these small biases that determine the direction of enormous cash flows.

A brand does not need constant love.

It is enough that it gets chosen without extra consideration. Ease acts as a quiet driver of brand growth.

We hear things before we see them

Brands are still largely built with the visual aspects first, even though our everyday life is deeply multisensory. Audio has a special capacity to reach us quickly. There is no need to look or turn towards it, and it is directly linked to our emotions and memories. A recognisable sound can activate an entire network of memories in the mind in just a fraction of a second, often before the eye even has time to focus.

*A recognisable sound acts as a shortcut to the brand.
And shortcuts almost always beat complex menus.*

A well-built brand audio identity:

1. speeds up recognition
2. makes decision-making easier
3. creates a sense of familiarity already before conscious consideration

The best time to build your company's voice was 20 years ago

If your company had started building a recognisable audio identity twenty years ago, you could now have exceptionally valuable intangible assets in your hands. Think of brands that you can recognise even with your eyes closed: one note, drum hit or short melody is enough. The brain immediately knows who it is.

Without a recognisable sound, the brand has to reintroduce itself time after time.

Recognition is created through repetition. Over time, the sound can become a competitive advantage that is difficult to replicate. Capital that lives not only in the brand guidelines, but in people's nervous systems.

The second best time to start is now

Surprisingly few companies systematically build memorability. Visibility is purchased, but recognition is often left to chance. The campaigns sound different from one another, the music changes and the soundscape is transient. It's like trying to become known by changing the name of the brand or product at regular intervals.





Brands compete in memory traces

When the brand lives in people's memory, the price pressure eases

One of the most persistent misconceptions in marketing is the belief that growth is largely driven by optimising the point of purchase. It is not. Without pre-existing demand, the focus suddenly turns to the price. Discounts become a way to defend volume, but the value does not grow.

Once the brand is embedded in your memory, something crucial happens:

the speed of decision-making exceeds the justifications. A brand does not feel like one option among others, but rather like the natural choice.

Don't ask where the decision is made, ask where the competitive edge is found

The most important question for a marketer may not be the exact time and place of the purchase decision, but the moment when we start to exert the influence of being the easy option.

A purchase decision is not an individual event; it is more like a long path of probabilities. And brands that shape that path early on will win more often.

The strongest brands of the future are built for memory

Attention has become an obsession in marketing, sometimes even an end in itself. But human attention is never switched off. Therefore, the right question is not whether the advertisement will be noticed. It is whether it has earned the right to be noticed and, above all, remembered.

Earned attention is only the starting point. Without the next memory trace, attention is completely useless, as attention is only momentary. Memory is cumulative.

Audio works for memory in the same way as the compound interest phenomenon: the longer it is built, the greater the competitive edge.

At this point, the brand's audio identity ceases to be a tactical add-on and starts to show as a strategic capability. As a system that makes it easier to choose the brand time and time again. In the end, the shelf is only the place where memory makes its judgement. And usually, the winner is not the loudest option, but the one that already sounds familiar.



The attributes that make audio attractive

Do you remember what kind of eject mechanism your cassette player had?

Noriaki Kano is a Japanese scientist and professor who developed the so-called Kano model in the 1980s. The model aims to explain why all attributes of a product or service do not increase customer satisfaction in the same way, even when they are technically equally good.

Kano realised that true differentiation and memorability rarely come from meeting basic requirements. They come from moments that exceed expectations.

The Kano model divides attributes into three main categories.

- 1.** Basic attributes are things that are taken for granted: for example, in the accommodation sector, the basic assumption that a booked room has a bed.
- 2.** Performance attributes have a linear impact on satisfaction: the better they are realised, the happier the client. This can be how well equipped a hotel room is, for example.
- 3.** The most interesting category in the Kano model is the third level, the so-called excitement attributes. These are unexpected elements that we do not know to ask for, but which, when catching us by surprise, produce a strong positive experience. In the hotel context, it could be something personal and unexpected, such as a book brought into the room that is related to the guest's previous booking or area of interest.



Antti Pehkonen
Creative Director at BAD Agency





The attributes that make audio attractive

The attractive attributes of audio are related to emotion and memory

Let's go back to the initial cassette player question, as another example of an attractive attribute comes from my own childhood in the '80s. The sound characteristics of a cassette player or the number of cassette decks were not significant. What was appealing was the eject mechanism. Did the door snap open with a clunk, or did it open smoothly, slowing down towards the end?

Kano's theory can also be applied to marketing. If not quite as an academic framework, at least as a framework for thinking. In audio advertising, the basic attributes are in order when the message is understandable and the sound quality is good. Performance attributes, on the other hand, could include a voice actor who fits well into the context. But the attractive attributes are related purely to emotion and memory.

It is a feeling or moment that catches the recipient of the message off guard or gets them smiling, emotional or to stop and listen. This is the most important aspect when designing impactful (audio) advertising.

In general, consumers do not expect advertising. For this reason, what kinds of emotions we manage to arouse with our message is precisely the most important explanation behind impact.

The quality of creative execution is the most significant ROI factor in advertising and has up to twelve times the impact on results.





The attributes that make audio attractive

Content produced by influencers appeals with its authenticity

One way to create appealing features is content marketing via audio channels. The content produced by influencers is authentic, interactive and appealing to emotions. It also does not follow the formula of traditional advertising; instead, it offers added value in the form of narrative entertainment or information.

When a brand is bold enough to give up excessive control and gives the influencer the space to communicate content with their own, familiar and authentic voice, it gives rise to impactful content marketing and attractive attributes as per the Kano model, with business-shaping effects.

On BADpod, I had the opportunity to dive deeper into the topic with two experts. **Janica-Saxelin Rinne**, Channel Manager at Radio Nova, and **Elsa Kalervo**, Head of Digital Audio at Bauer Media, shed light on what kinds of memory traces commercial content offers and what kinds of messages affecting behavioural change the influencers of radio programmes and podcasts will bring about in 2026.

A few highlights:

1. Content marketing in audio increasingly relies on comprehensive distribution, authenticity and influencers.
2. A single format is not enough; it must be possible to share content on several different platforms at different times in the target group's everyday life.
3. Authenticity is crucial: audio is a human medium that comes close to the listener; an inauthentic or tacked-on message drives the listener away.

The significance of familiar influencers is emphasised here, as they are able to build trust and impact in a way that traditional advertising cannot. Could the keys to solving the advertiser's be found here, [Sanna Myller](#)?



Audio advertising trends

In 2025, we had an increasingly bumpy road when it came to familiar things, and sidetracks were created by, for example, politics and technology. Some say we have already reached an AI singularity, and the global world order is changing rapidly.

Once again, we are moving fast towards the unknown and unpredictable. Audio lives in time, too, and the coffee grounds are not in a clear order for predicting the future in its microcosm either.

I wanted to highlight three trends that affect commercial audio and how it is made and experienced, now and in the near future. We will talk about moments, AI-assisted advertising content and the importance of differentiation.

Audio is alive and well, and its value is being recognised more widely than before. It carries the brand everywhere, from the jogging trails to the bread shelves. Globally, even the marketers coming latest to the party are starting to wake up to the efficient use of audio through new distribution channels and innovative solutions. Bubbles are forming under the surface, and our life with marketing will become easier on the way to more flexible, effortless and efficient use of audio.

Sources: IAB Europe Attitudes Report 2026, The State of Audio Adtech Report 2025



Ismo Heikkilä
Creative Director at Bauer Media Audio



Audio advertising trends

Trend 1: Moments

The focus is shifting to attention metrics also in Finland. The increase in the accuracy of programmatic audio purchasing directly responds to advertisers' wishes for efficiency and attention value in a fragmented media world. According to IAB and Adswizz, up to a third of the world's digital audio purchases are estimated to be programmatic in 2026.

In terms of content, this means not only spots for precisely targeted moments, but also an increase in brand-promoting general spots.

As cookies run dry, use instances become a trackable currency.

Contextual empathy is emphasised for the marketer, and customer insight rises to the forefront.

The content and use instances and times will allow for the advertising of funds while listening to an investment podcast, for example. With our FM-type channels, using the time-of-day variable could become a convenient way of reaching the target group during shopping trips, for example. Top-of-Moment will become a new -ism in 2026, and it will be utilised by more closely combining media use and spot content.



Audio advertising trends

Trend 2: AI-assisted advertising content

Also in audio, a trend revolutionising the industry will be GCO (generative creative optimisation). This means AI-assisted content editing. Its impact on advertisers is greater than the entry of voice control into the market, which sparked a lot of debate at the time. Customisation of advertising content is made easier as a discount, the weather, the time or even the name of the city are modified automatically. Previously, this required its own, separately dubbed block in the middle of the rest of the speech and its separate file. It had to be compiled, sent and trafficked.

There is a vision on the horizon where the advertiser attaches to channels with their own AI source to an “intelligent file” that communicates without human intermediaries.

In Kuopio, the ad could speak in the Savo dialect, and in Helsinki, the dialect of the capital region, reacting to the user’s emotional state or purchasing needs, or, for example, it could sell a kalakukko to a former Savo resident in their home dialect after a smartwatch analyses their bodily functions and detects a sudden bout of homesickness.

Where are we currently? In the first half of the year, Bauer Media Audio will release an AI-based solution, Audiomator, intended for Finnish advertisers. For example, it will allow them to edit an offer within a spot directly from text to speech and have the spot ready for broadcasting immediately. This enables new, fast-paced and cost-effective ways to do marketing communications in audio and tailor their message to different channels.



Audio advertising trends

Trend 3: The importance of differentiation

Also in 2026, advertisers will compete for attention. A brand needs to come to mind at the right time. For this, the message must be sharp and the implementation engaging.

As AI audio slop improves from a laughingstock to the level of mediocre execution, it will set a new standard for audio-based marketing communications. Faster and easier production and reduced costs bring smaller operators to the market.

A grey wallpaper makes the colours stand out even better, and the differentiation reflects directly to brand recognition. A case in point is the Puuilo advert: Tuutko hakeen? (You coming to get it?) - En. Tuun. (No. Yes.)

When everyone is able to produce passable results in 15 minutes on their own computer, their own way of being heard, creativity and courage to do things become increasingly emphasised as differentiating factors.



What does the new gambling market sound like?

The opening of the gambling market on 1 July 2027 is one of the most significant changes in the Finnish media environment in recent years. It is necessary to take into account the risks, threat scenarios and general problems related to gambling in the discussion, but from our point of view, we are also talking about opportunities for growth, renewal and higher-quality advertising.

Experience from other markets shows that a controlled change in a well-managed media environment does not lead to chaos; it leads to competition and development, which raises the level of the entire industry and the opportunities of domestic media production in the competition with international digital giants.

When a new market opens up, industry operators look for marketing forms and channels that combine broad reach, a high-quality media environment and strong impact. This is where audio shines.

The position of audio is exceptionally strong also in this transformation. Radio reaches almost all of Finland every week, and audio is one of the most effective ways to build both a brand and make a profit with tactical advertising.



Sami Tenkanen

Managing Director at Bauer Media
Audio



What does the new gambling market sound like?

The change raises questions. Will the advertising breaks be filled with gambling advertising, will the whole thing become more uniform and should we protect our brand, ensure that we stand out from these new players? Experience from international markets shows that regulation, operating principles and level-headed commercial governance keep everything in balance.

In Finland, too, media companies and their self-regulation play a key role in ensuring that the market develops responsibly and in a controlled manner and that the media environment remains diverse and balanced also in the future.

The opening up of the new gambling market brings new advertisers, increases the opportunities for media companies to invest in Finnish media and, thereby, strengthens their positions as they compete for people's time. High-quality and competitive Finnish media are in the best interests of all of us. With correct management and implementation, the audience, marketers and media companies all win.



Our vision of smooth service

The feeling of smooth service is one we recognise as soon as we encounter it. In my own work, smooth service consist of the user finding the information they need effortlessly and quickly reaching their goal. When this is combined with state-of-the-art user interface design and genuinely relevant and useful data for the user, we are at the heart of modern technology.

Audiomator – the next step in the world of self-service audio

Our first significant step on the way to making our services easier is a new self-service user interface for managing audio advertising. Audiomator is an AI-assisted technology that enables the quick, safe and secure updating of an audio advertisement – if they so wish, the user can update the advertisement from their home sauna, for example. Messages can be flexibly targeted at different times of the day and, if necessary, the advertisement can be removed from broadcast in seconds with the “Stop” function, even outside office hours.

Audiomator brings a new level of flexibility to audio advertising: our clients can update their advertising content in real time, independently.

Audiomator is not only limited to FM frequencies, but also controls audio spots for Bauer Media’s digital channels, the Audio-Xi network and Retail Audio.



Sini Kervinen
Director, Tech and Innovations at
Bauer Media Audio



Our vision of smooth service

AI-assisted technology speeds up and streamlines the production of audio content, which is immediately noticeable in the advertiser's everyday life. In addition, our creative audio agency, BAD Agency, supports our clients along the way, from concept to implementation and from building the soundscape to choosing an up-to-date AI voice.

Development where the unseen is also part of the whole

Audiomator is just the beginning. At the same time, we are renewing both the services visible to clients and the entire technological foundation of Bauer Media. Automation solutions are evolving, manual work steps are disappearing and genuine client value is increasing.

We take into account the varying needs of advertisers in our development work. We develop solutions together with end users and evaluate their functionality from the point of view of both usability and concrete benefits. For us, innovation is not about novelty; it is about solutions that bring real value to the end user's and audio advertiser's everyday life.

Technology as an enabler – not as an intrinsic value

The value of change is measured by whether it makes processes more effective and adds value. Real development comes from the courage to question your own and your team's ways of working and the courage to try new things. Continuous learning and bringing out ideas and reviewing them together with clients are the values on which our entire vision is built.

We have a clear direction and an ambitious goal: we want to continue our journey with our clients with courage and an open mind. Stay tuned for more!

