



Digital Revenue

The Growth Opportunity For Broadcasters



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Today's Session

1. Changes in digital media consumption
2. Changes in advertising spending across media
3. Opportunities for local media companies
4. What local advertisers want more of
5. Local ad spending in this state
6. Adding digital to your pitch
7. Using AI for creative



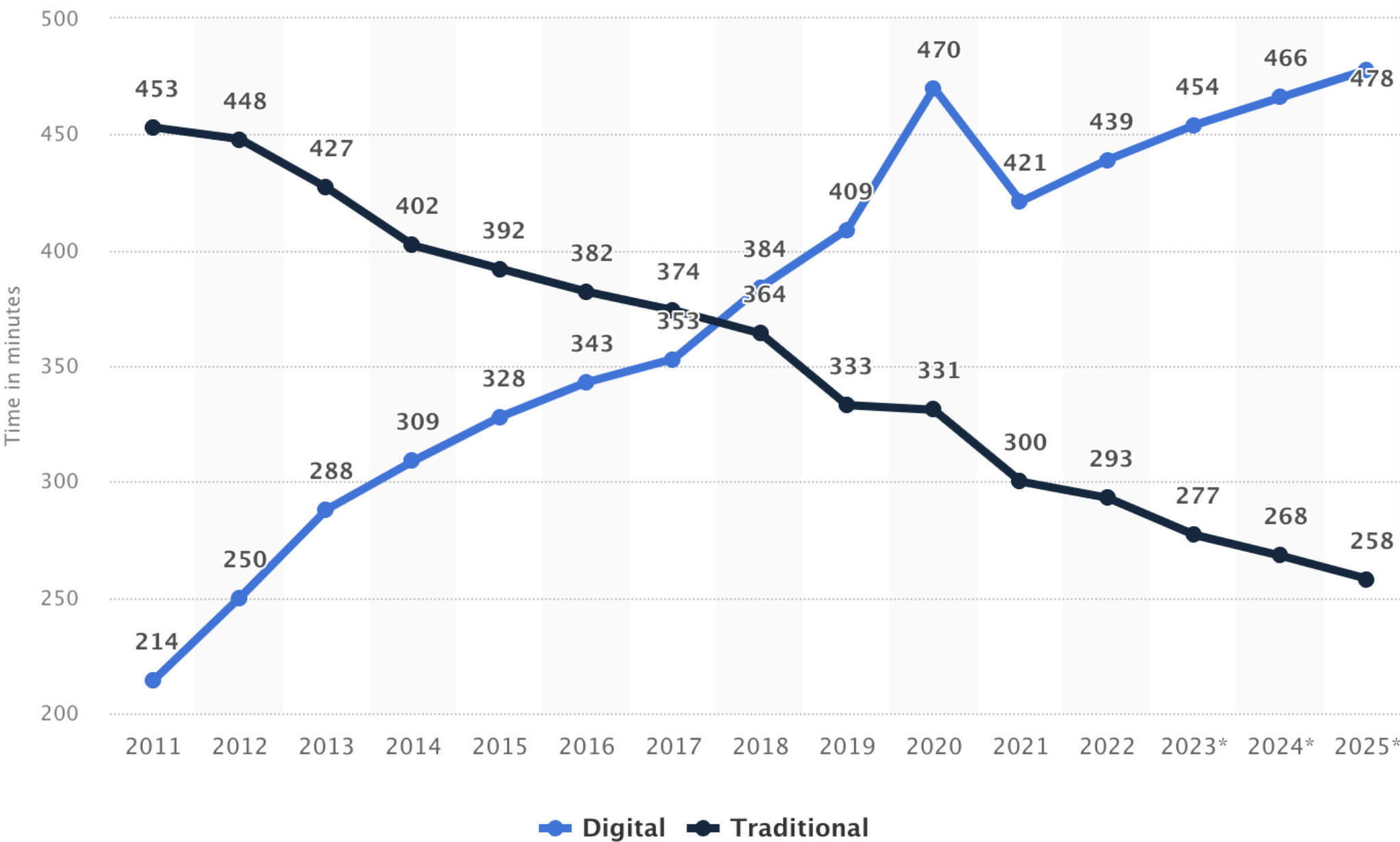
Digital
Revenue



Consumption Trends

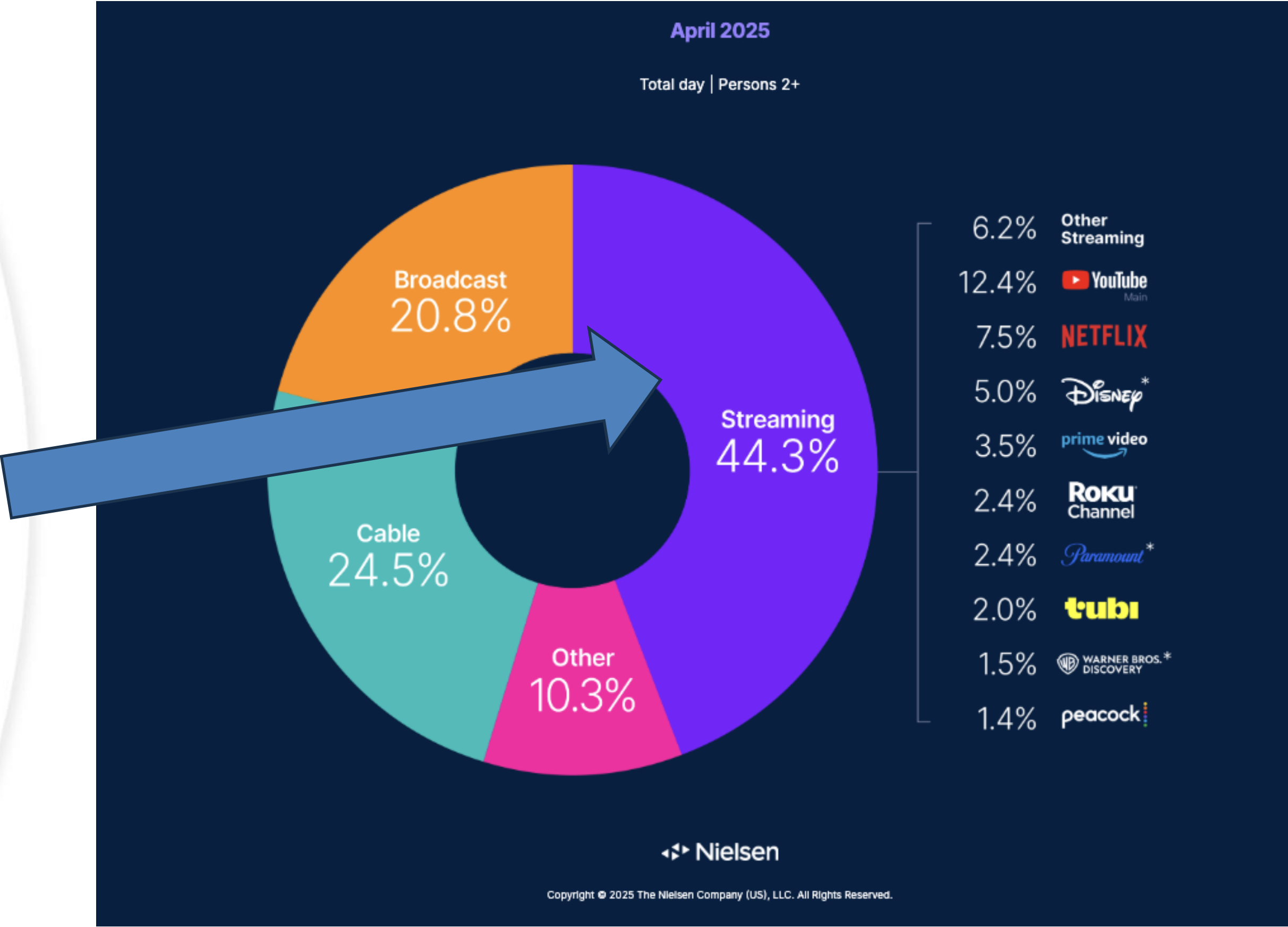
Digital Consumption Continues to Grow

Average Daily Media Consumption	Traditional	Digital
2011	7.5 Hours	3.5 Hours
2025	4.3 Hours	8 Hours



Source: Statista 2024

Streaming Video is Dominant



Source: Nielsen 2025

Radio is the biggest player in audio

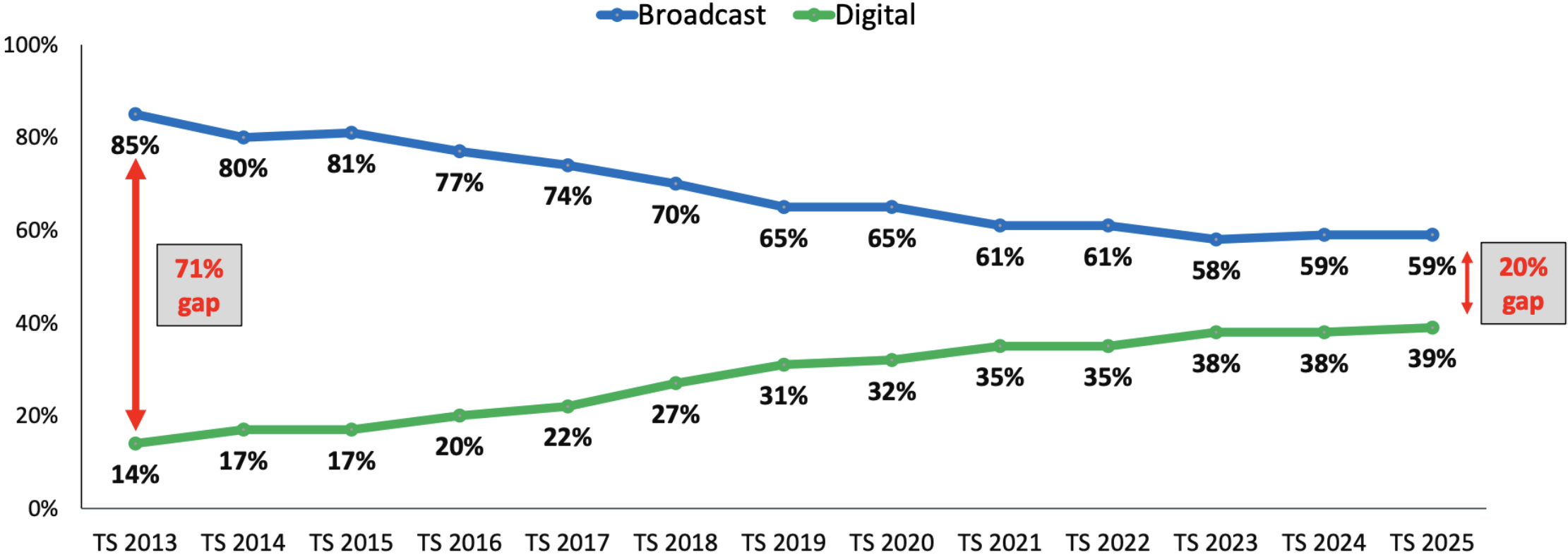
but no longer represents a majority of listening



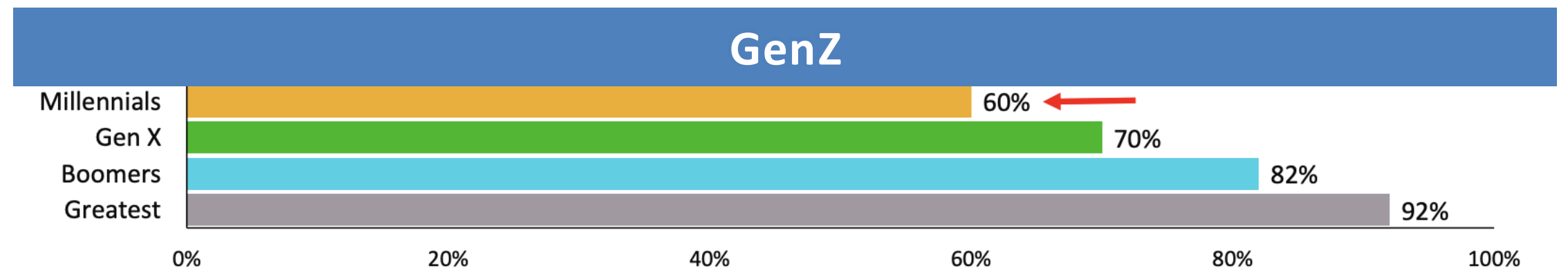
Source: Edison 2024

Radio's Core Listeners

P1 Station Listening Platform Trend: Broadcast vs. Digital



Core Radio Listeners with a Working Radio at Home

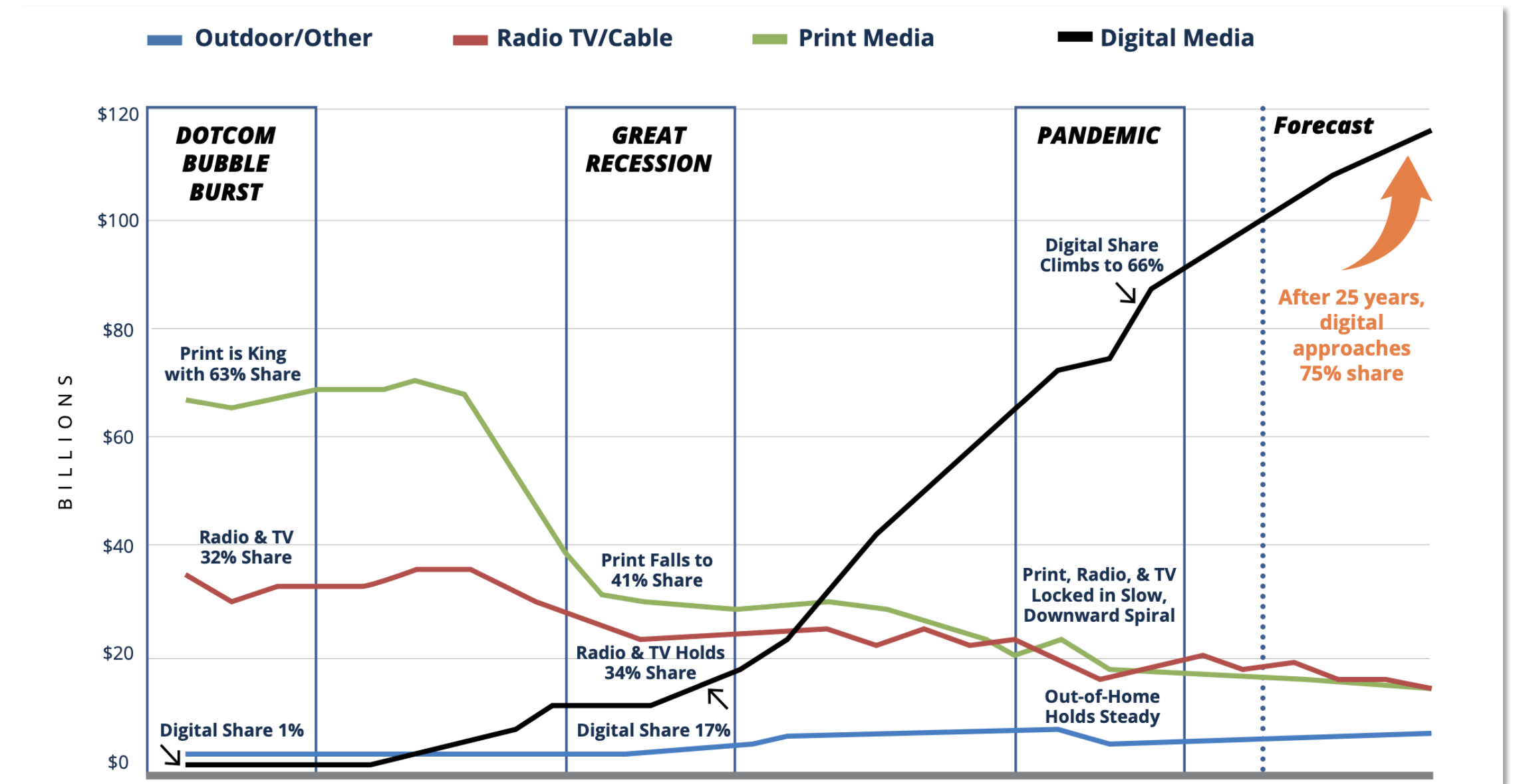


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Advertising Trends

History of Ad Spend

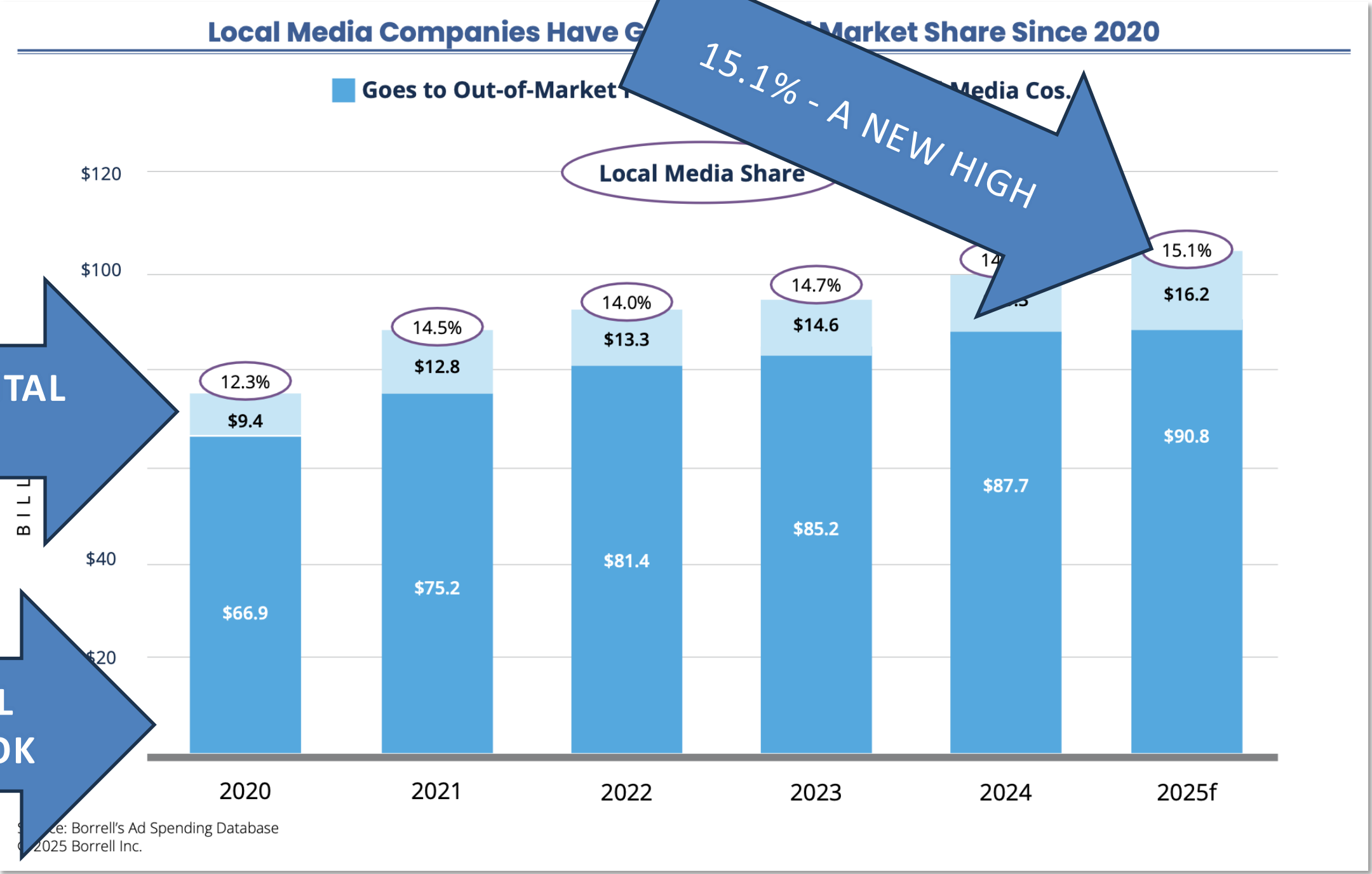


Where the Money Goes



LOCAL MEDIA DIGITAL PURCHASES

DIRECT TO DIGITAL
GOOGLE / FACEBOOK



Borrell 2025

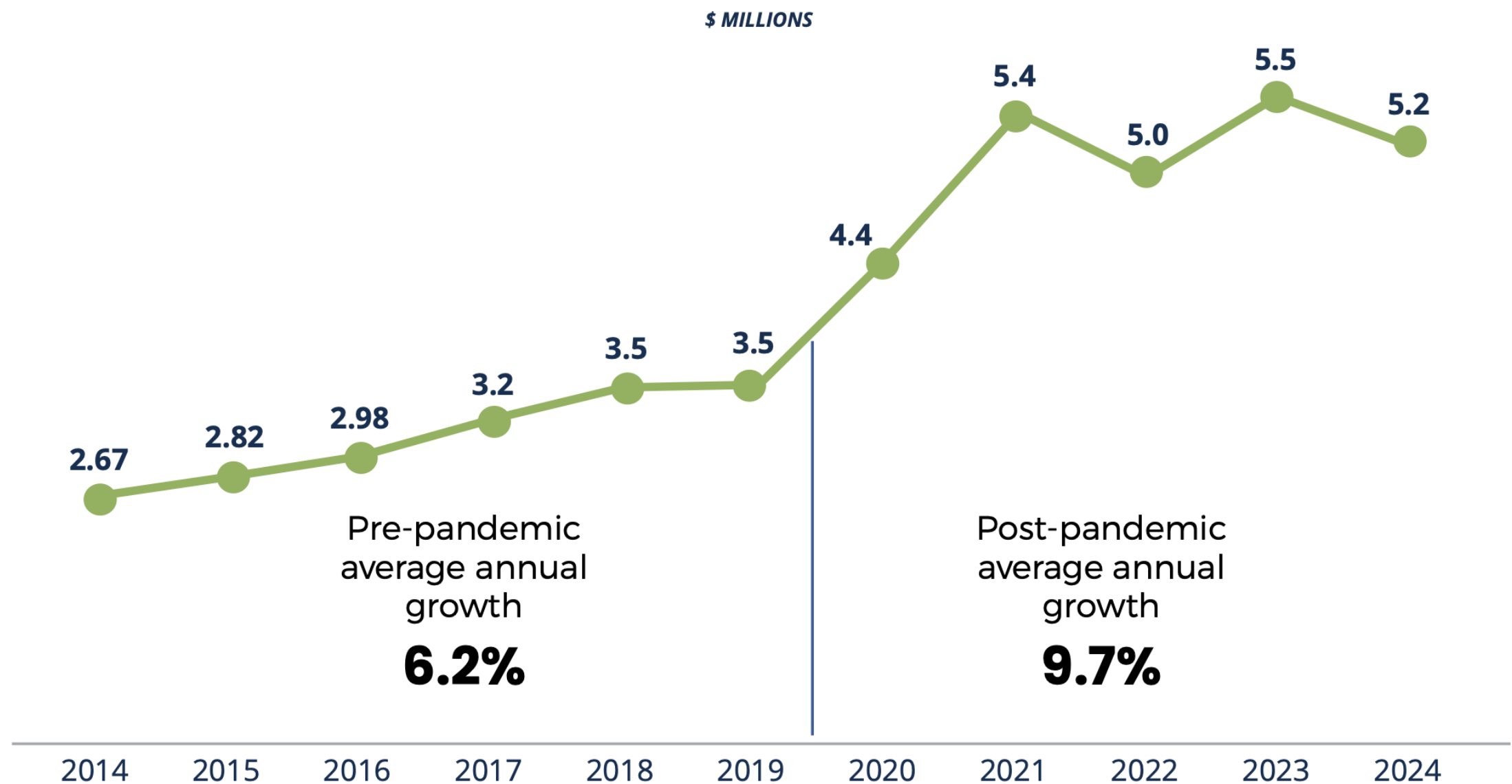


Where is the growth?

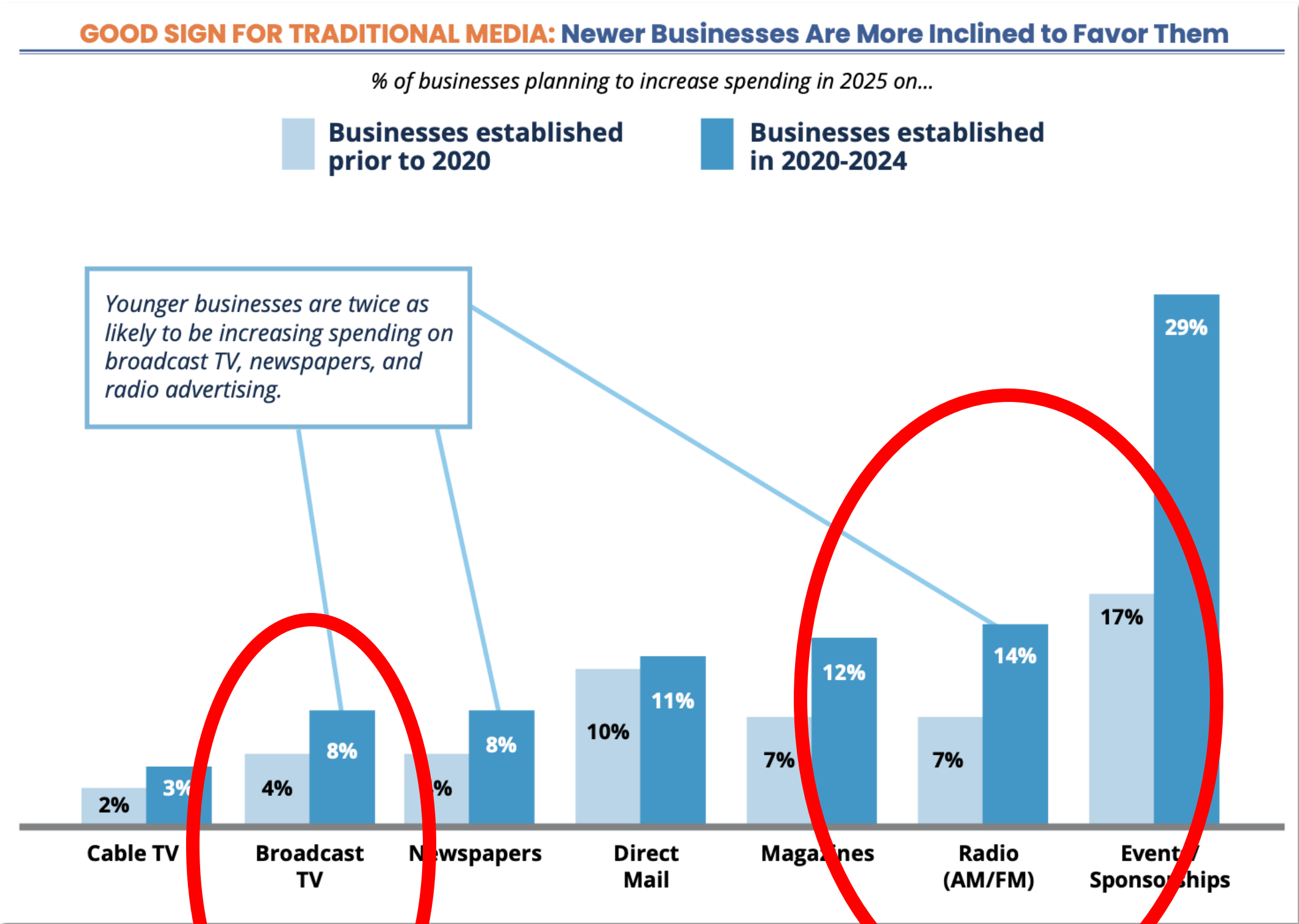
New Businesses in the U.S.



INFLUX OF NEW BUSINESS: Number of Business Applications in the U.S., 2014-2024



New Businesses More Likely to Want Traditional Media



How to find these businesses



“The way that sellers find these new businesses does not exist.

“The old prospecting methods are ‘eyes and ears.’ You can't find them by driving to work and seeing these businesses on a billboard or listening to a competitor's radio station.

“The problem is that these new businesses do the majority of their advertising in digital, and almost all digital is targeted. ”

Average Digital Revenue per Radio Cluster



FIGURE 3.14

Average, Median, & Best-Practice Digital Revenue for Radio Clusters, 2024

Annual Digital Revenue Per Market Cluster					
DMR Market Rank	SAMPLE SIZE		Average	Median	Best Practice*
	Stations	Clusters			
1 to 10	360	89	\$5,328,082	\$2,910,707	\$24,739,546
11 to 20	286	67	\$4,460,482	\$2,524,500	\$17,875,111
21 to 50	519	121	\$2,608,715	\$1,308,102	\$11,410,799
51 to 100	742	167	\$1,748,410	\$844,277	\$7,225,677
101 to 150	560	121	\$1,253,292	\$644,789	\$5,697,565
151 to 200	421	85	\$1,190,187	\$616,989	\$4,843,490
201 to 250	262	55	\$802,738	\$518,959	\$2,604,673
251 to 300	222	44	\$640,330	\$322,139	\$1,845,187
(smallest) 301 to 513	305	73	\$358,163	\$243,608	\$1,299,244

*Best Practice = the average revenue of top 5 revenue producers in each market grouping
 Source: Borrell Associates Revenue Database
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Where TV Advertisers Are Increasing Spend

TV Advertisers More Likely to Be Increasing CTV/OTT, SEM. & Banners

	Those who buy Broadcast TV advertising	Those who don't buy Broadcast TV advertising
Net: Planning to Increase Something	67%	57%
Social Media	34%	25%
SEM	31%	20%
Banner Ads	23%	16%
Streaming Video/OTT/CTV	22%	7%
Events/Sponsorships	19%	18%
Broadcast TV	16%	2%
Direct Mail	14%	10%
Mobile SMS/Text	12%	6%
Streaming Audio	11%	7%
Out-of-Home/Outdoor	11%	6%
Content Marketing	10%	10%
Radio (AM/FM)	9%	8%
Email Sponsorships	9%	6%
Magazines	9%	7%
Mobile In-app Ads	9%	5%
Cable TV	9%	2%

67% of Broadcast TV buyers plan to increase spending on something this year. . .

TV Buyers are about **50% more likely** to be increasing spending on **SEM** and **Banner Ads** this year and three times more likely to be increasing budgets for **Streaming Video/OTT/CTV** . . .



Ohio Digital Revenue

\$646,674,000 in digital



Ohio Digital Revenue

City	Market Rank	2023	2024	Difference
Athens	357	\$3,098,752	\$3,357,509	8%
Canton	106	\$44,866,652	\$45,128,395	1%
Chillicothe	353	\$3,763,982	\$4,202,789	12%
Cincinnati	44	\$113,592,175	\$118,522,495	4%
Cleveland	21	\$116,919,227	\$168,222,547	44%
Columbus	28	\$128,308,551	\$134,141,904	5%
Dayton	80	\$48,252,694	\$48,307,181	0%
Findlay	305	\$8,440,490	\$8,331,453	-1%
Hamilton	120	\$31,441,680	\$33,257,128	6%
Lima	246	\$12,538,695	\$12,632,199	1%
Mansfield	271	\$6,823,128	\$7,658,247	12%
Portsmouth	409	\$3,751,843	\$3,820,404	2%
Sidney	387	\$4,557,383	\$4,608,228	1%
Toledo	94	\$30,256,911	\$32,181,130	6%
Youngstown	131	\$20,537,280	\$22,302,614	9%
		\$577,149,443	\$646,674,223	12%



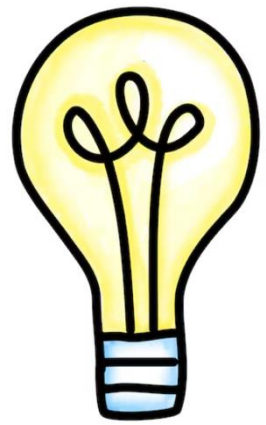
Ohio Digital Revenue

Outside the biggest 200 markets

City	Market Rank	2023	2024	Difference
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		\$42,974,273	\$44,610,829	4%



Digital Revenue



If you want to make more money in 2026 than you will in 2025, digital needs to be an essential component of every advertising campaign.



Digital
Revenue

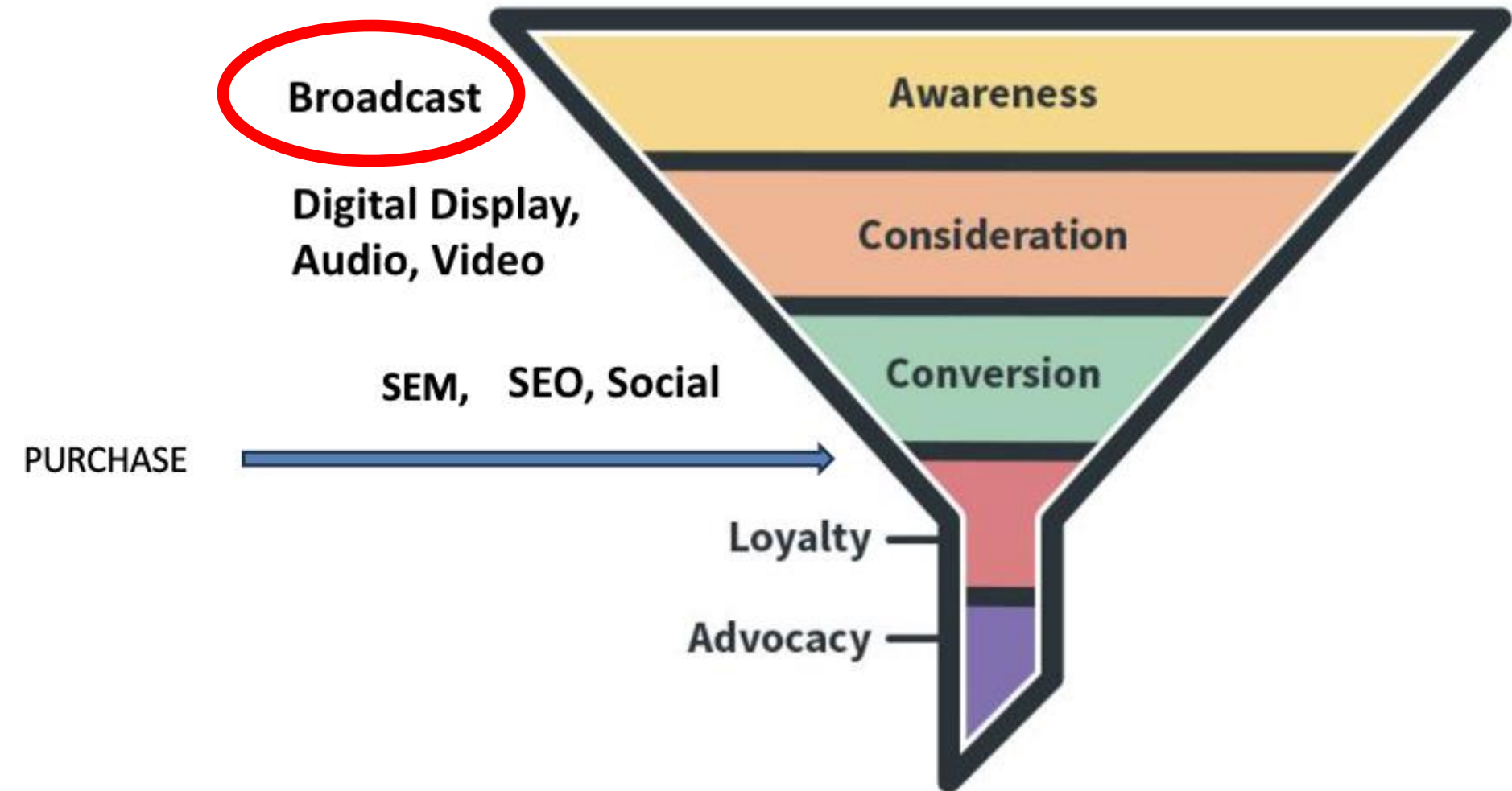


Integrating Digital into Your Pitches

(without undermining broadcast advertising)

The “Why”

To be sure, broadcast remains essential for many marketing campaigns.

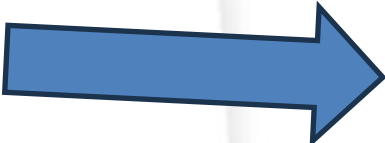


Credit union grand opening audio campaign

A regional credit union is opening a new branch in Port Clinton and wants to promote its expansion.

Example #1: Adding Digital Audio

At work, In the car



At home, in the gym, mowing the lawn, on Alexa



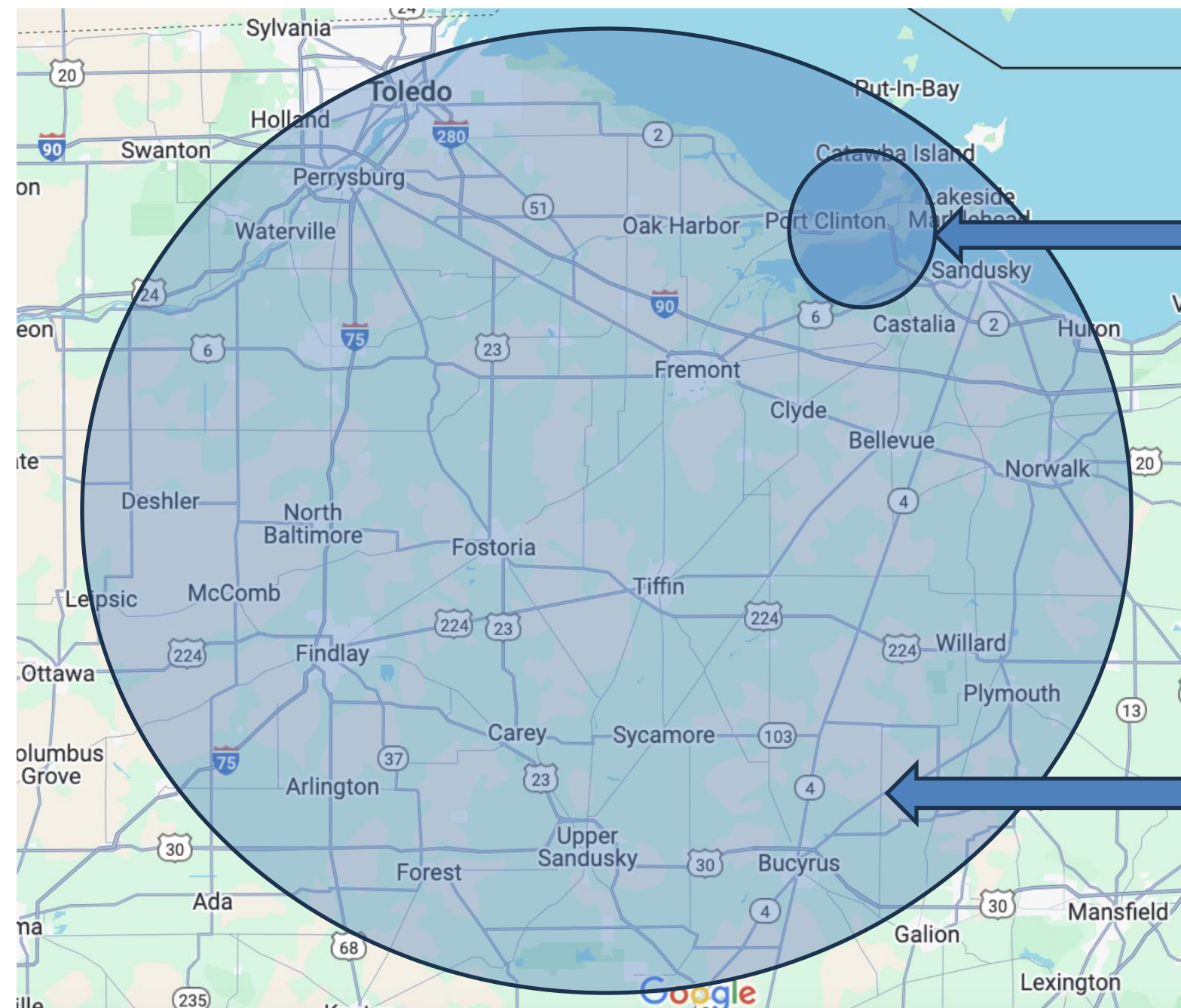
	Units	Impressions	Cost Per	Subtotal
Broadcast	50	25000	25	1250
Digital	-	75000	25	1875
			Total	3125



Credit union grand opening audio campaign

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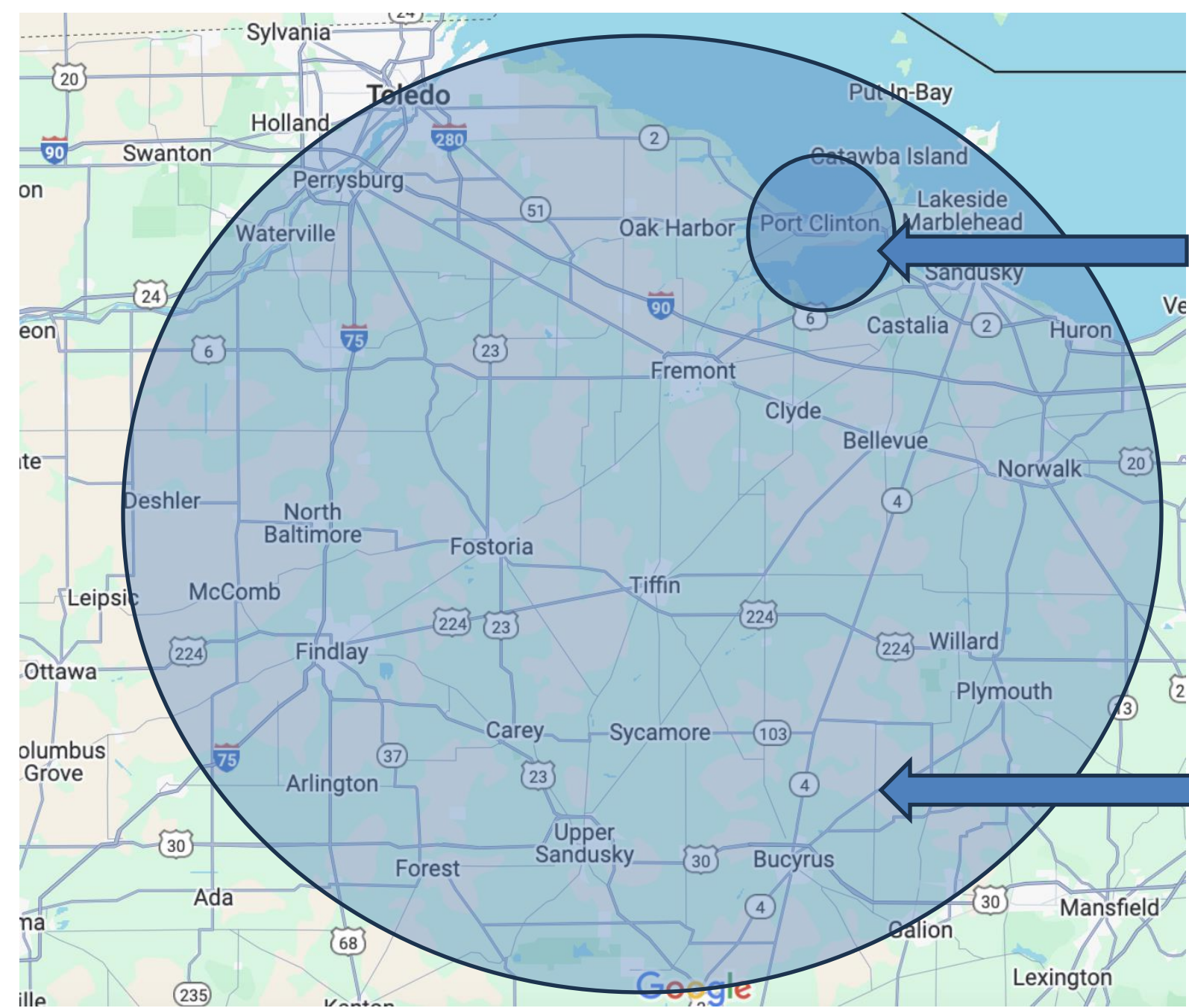
Example #1: Adding Digital Audio



The Pitch: “We’ll serve 25,000 audio impressions on our radio station to everyone to all of our radio listeners and 75,000 impressions to listeners within a 5-mile radius of Port Clinton who are streaming our station or listening to podcasts or digital music services like Spotify and Apple podcasts.

This allows the entire market to know about the growth your credit union is experiencing while super-serving those living and working around the new branch.”

Example #1: Adding Digital Audio



Example #1: Adding Digital Audio



Broadcast Copy:

Northwest Ohio—your hometown credit union just got bigger!

Black Swamp Regional Credit Union is now open in Port Clinton, bringing 15 branches strong and the same friendly service you trust. Say goodbye to fees with no-fee checking, plus great rates and easy digital banking wherever you go. Celebrate with us at our brand-new Port Clinton branch—your money's new happy place! Black Swamp Regional Credit Union — Proudly local. Now in Port Clinton.

Digital Copy:

Hey Port Clinton—something new just docked downtown!

Black Swamp Regional Credit Union is now open right here in your backyard, and we're bringing no-fee checking, local service, and banking that actually makes sense. Whether you're grabbing coffee on Madison Street or heading to the marina—your money stays local, just like you. Stop by our brand-new Port Clinton branch and say hello! Black Swamp Regional Credit Union — Port Clinton's newest neighbor in smart banking.

Campaign Recap

Example #1: Adding
Digital Audio

After campaign reporting:

- Broadcast affidavit
- Broadcast website clicks *
- Digital impressions *
- Digital clicks *
- Digital foot traffic *



Example #2: Adding Digital Video



HVAC Promotion

An Athens HVAC company wants to promote its AC checkup special

	Units	Impressions	Cost Per	Subtotal
Broadcast	50	25000	25	1250
OTT/CTV	-	50000	30	1500
Social Video	-	100000	20	2000
		175000		4750

Composition

42,432

TOTAL AUDIENCE

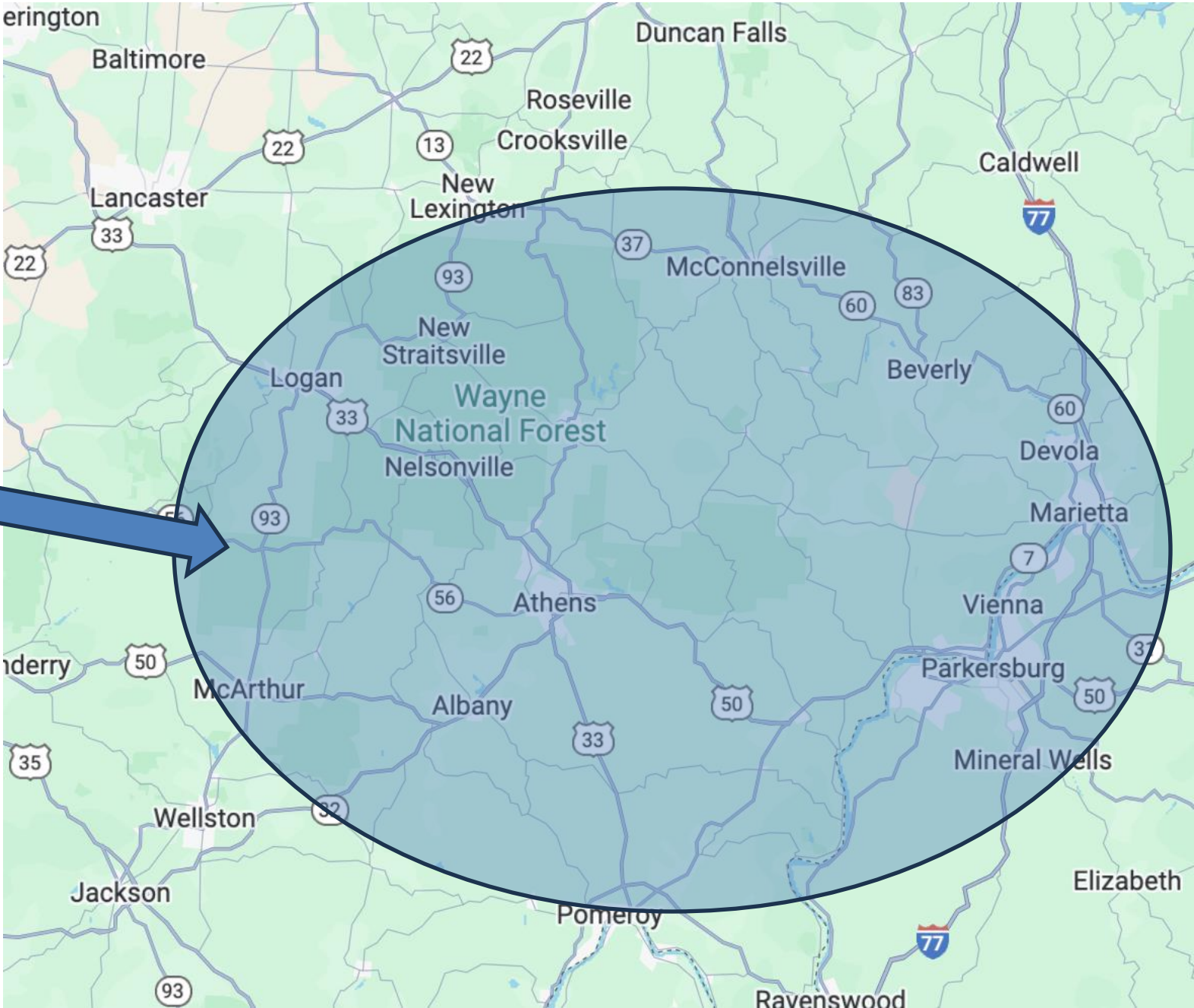
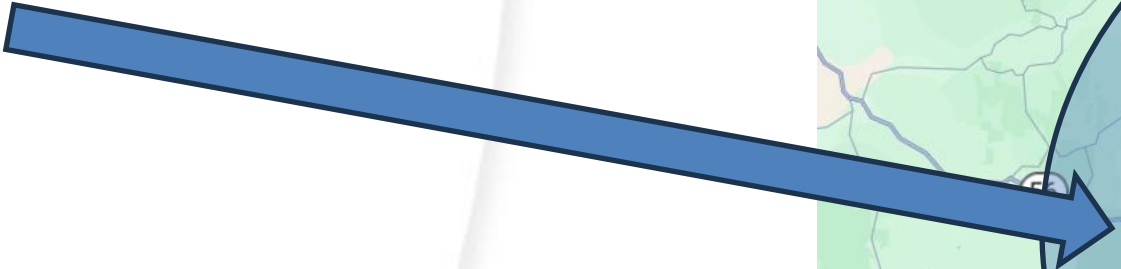
Radius: 30 miles from center of
Athens, OH 45701, USA

Example #2: Adding Digital Video

HVAC Promotion

An Athens HVAC company wants to promote its furnace checkup special

- Broadcast impressions
- Digital impressions targeting homeowners



Example #2: Adding Digital Video

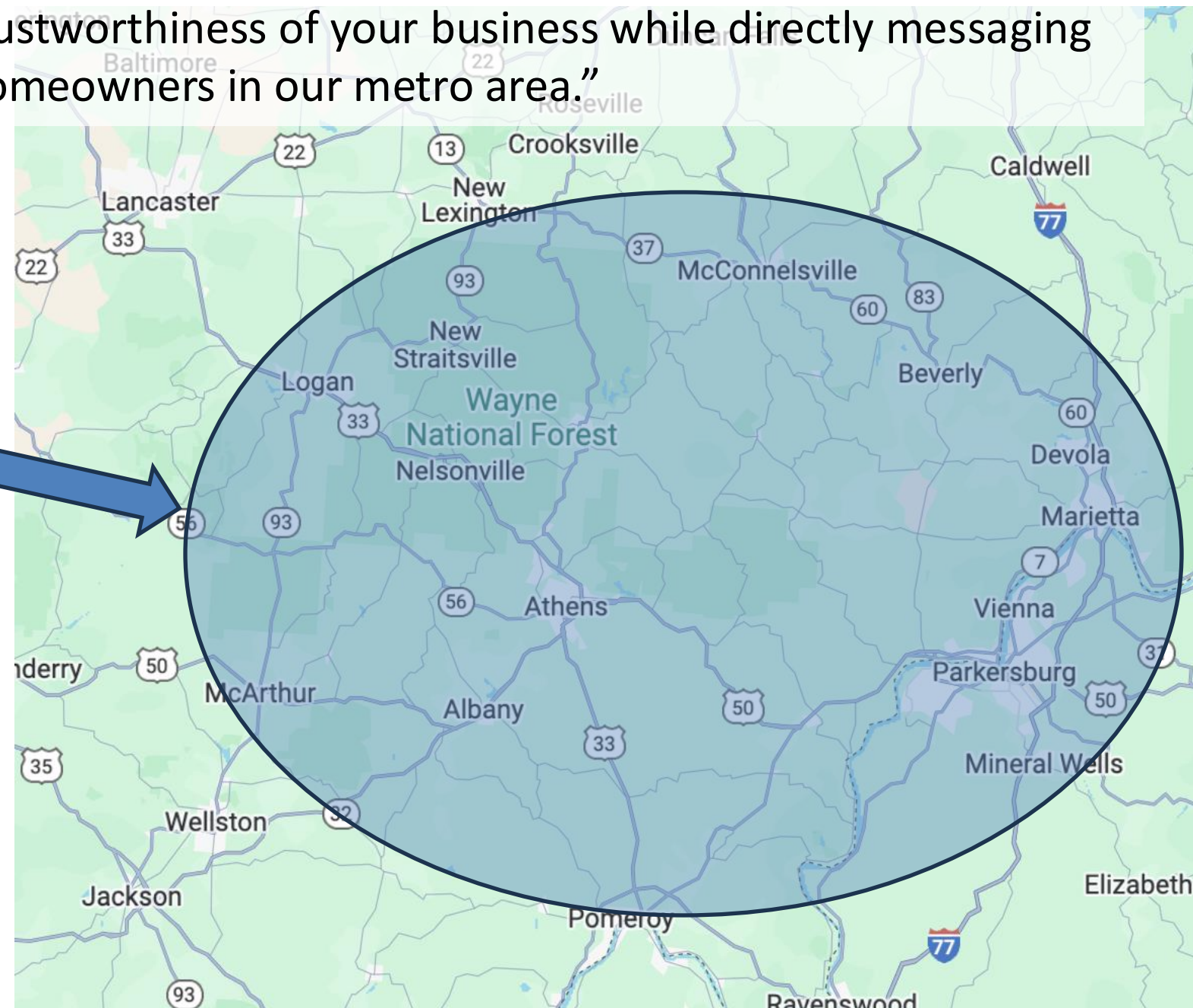
- Broadcast impressions
- Digital impressions targeting homeowners



The Pitch:

“We’ll serve 25,000 audio impressions to our broadcast users, and 50,000 impressions to digital/smart TV viewers who are homeowners in our area. We will reinforce this TV messaging with 100,000 video impressions to homeowners on social media.

This allows the entire market to know about the trustworthiness of your business while directly messaging homeowners in our metro area.”



Example #2: Adding Digital Video

Campaign Recap

After campaign reporting:

- Broadcast affidavit
- Broadcast website clicks *
- Digital impressions *
- Digital clicks *
- Digital foot traffic *
- Social impressions
- Social clicks
- Social foot traffic *



Example #2: Adding Digital Video

AI Video

“AMAZING”



Activity



Summary



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Summary:

1. Digital consumption is soaring
2. Digital advertising is increasing
3. 360 campaigns with digital and broadcast allows businesses to market to the consumer through the entire customer journey