

# DIGITAL MEDIA CENSUS BY MARKET

by Michigan Association of Broadcasters

The Michigan Association of Broadcasters (MAB) administered the **Michigan Digital Media Census for Broadcasters** from August 6th through October 9th, 2015. This included a one-week beta testing period. The survey link and accompanying letter was sent by email to every MAB member station.

Over the course of the survey, which included data collected through the online survey and collected over the phone, 81 surveys were filled out. These 81 surveys included 155 radio and television stations from every market across the state of Michigan, bringing us to a 51% response rate. We believe that this response rate, combined with the fact that every market in our state is represented, gives us the unique opportunity to extrapolate and interpret the data to gain an in-depth look at the current use and footprint of digital media for all our broadcast stations.

## **MARKETS REPRESENTED** BY SURVEY RESULTS

In order to extrapolate unambiguous data, we have broken most results out into five categories:

- 1) **Television** - all of Michigan included
- 2) **Market 1 Radio** - Detroit Metro Area
- 3) **Market 2 Radio** - Ann Arbor, Battle Creek, Flint, Grand Rapids, Kalamazoo, Lansing and Tri-Cities
- 4) **Market 3 Radio** - Adrian, Cadillac, Jackson, Port Huron and Traverse City
- 5) **Market 4 Radio** - Alpena, Escanaba, Marquette and Others

Radio markets correspond with the current competition categories used for Broadcast Excellence Awards and Station of the Year.

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# HOW DO MICHIGAN BROADCASTERS HANDLE THEIR **DIGITAL MEDIA ADVERTISING**?

This question was posed to find out how many stations are able to control their own digital media advertising, and how many have little or no control over these decisions.

**According to our data, broadcast stations across the state of Michigan have full or partial control over the advertising decisions related to their digital media platforms.** These platforms include their mobile app, email marketing, social media accounts, and website.

The charts below and on the following page detail the answers to this question. The data is broken into all stations, TV stations, and four radio markets. *Respondents could check all that applied.*

## DATA AS A WHOLE: **155 STATIONS**

**155 radio and television stations reporting**

40.7% are controlled at both corporate and local levels

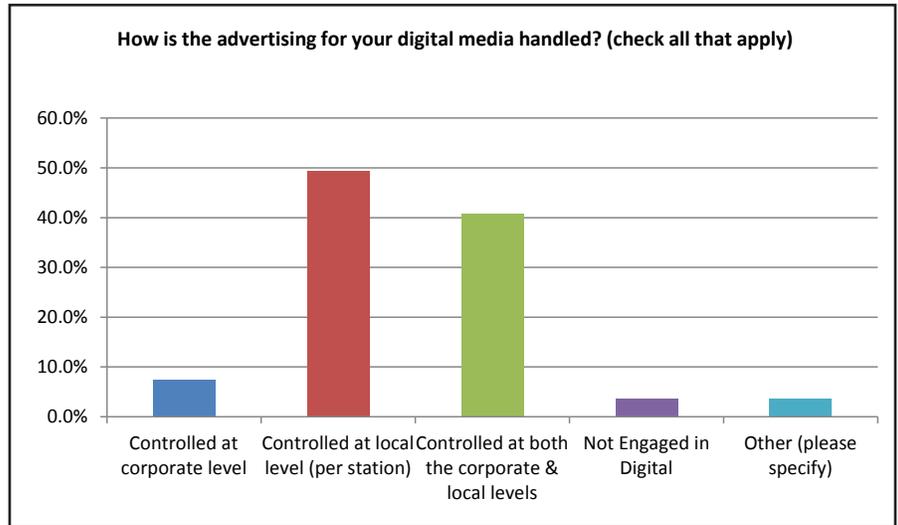
49.4% are controlled locally

7.4% are controlled at corporate

3.7% are not engaged in digital

3.7% "other:"

- 90% is controlled locally
- Part of corporate-owned digital
- Not applicable



## DATA BREAKOUT: **TELEVISION STATIONS**

**20 television stations reporting**

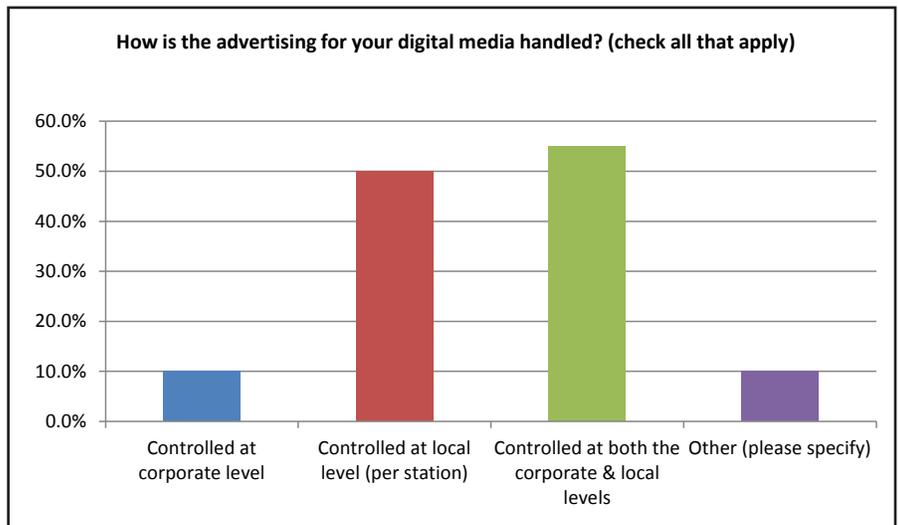
55% are controlled at both corporate and local levels.

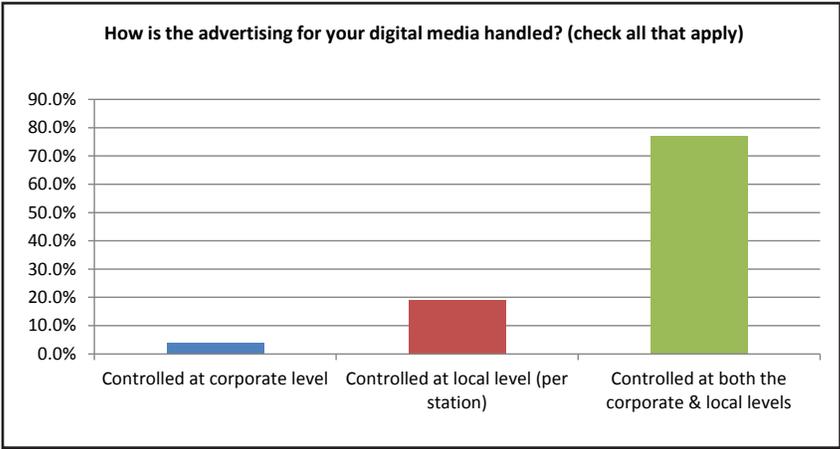
50% are controlled locally

10% are controlled at corporate

10% "other":

- 90% is controlled locally
- Part of corporate-owned digital





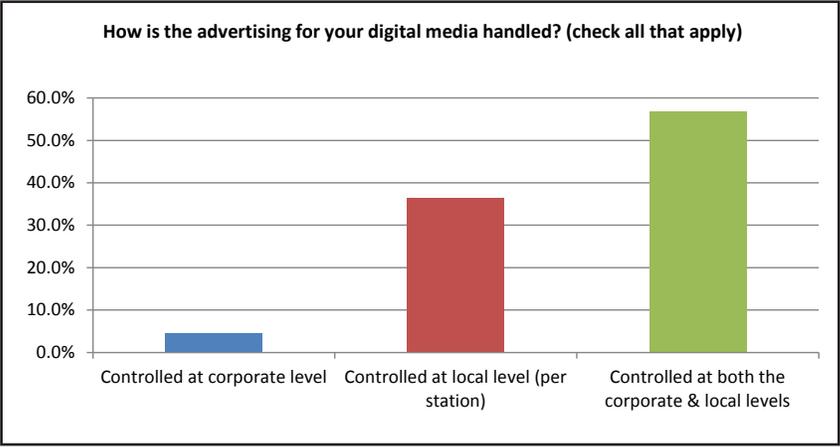
**DATA BREAKOUT:  
RADIO MARKET 1**

26 stations reporting

76.9% controlled at both corporate & local levels

19.2% controlled locally

3.8% controlled at corporate



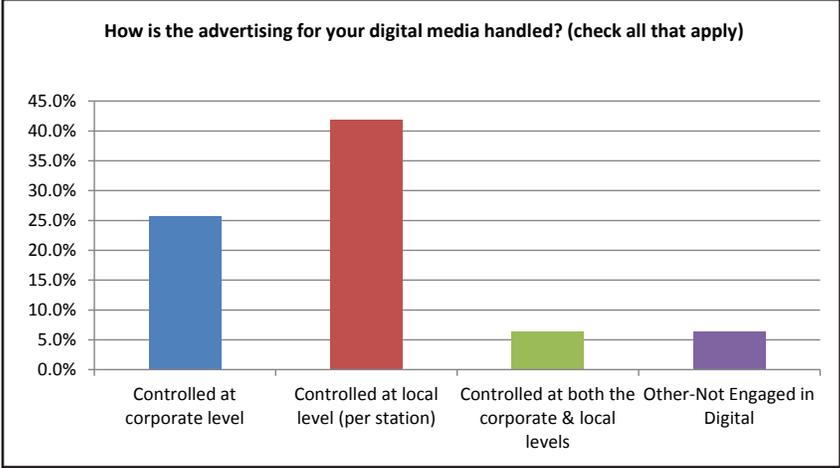
**DATA BREAKOUT:  
RADIO MARKET 2**

44 stations reporting

56.8% controlled at both corporate & local levels

36.4% controlled locally

4.5% controlled at corporate



**DATA BREAKOUT:  
RADIO MARKET 3**

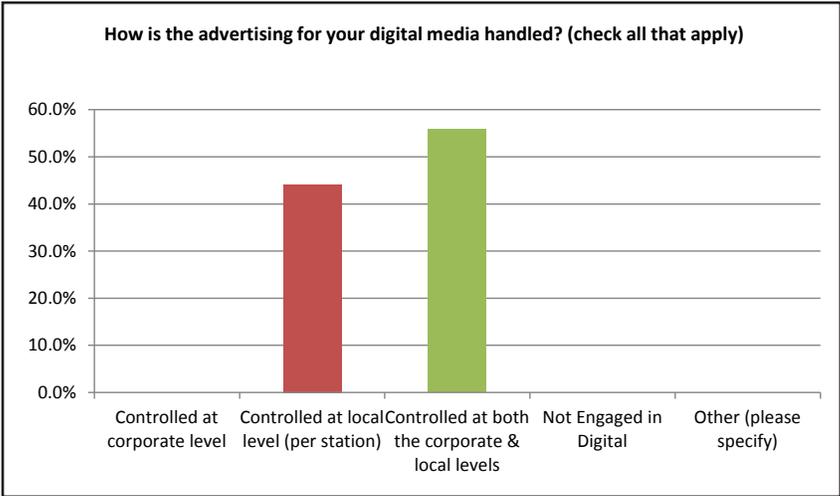
31 stations reporting

6.5% controlled at both corporate & local levels

41.9% controlled locally

25.8% controlled at corporate

6.5% not engaged in digital



**DATA BREAKOUT:  
RADIO MARKET 4**

34 stations reporting

55.9% controlled at both corporate & local levels

44.1% controlled locally

0% controlled at corporate

# WHICH DIGITAL MEDIA PLATFORMS ARE MICHIGAN BROADCASTERS USING?

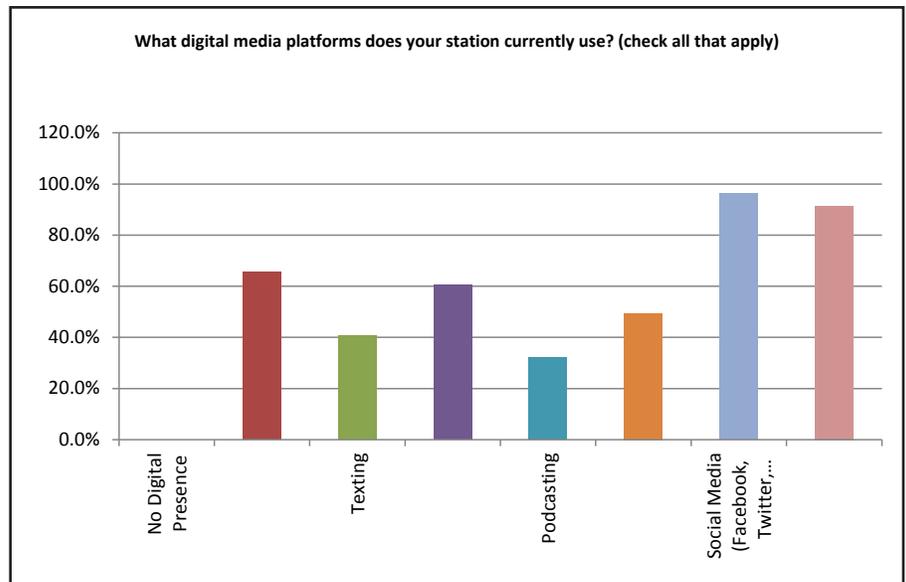
Nearly all Michigan broadcasters are using social media, followed closely by a website or streaming service. Overall, podcasting is the least used by broadcasters.

The charts below and on the following page detail the answers to this question. The data is broken into all stations, TV stations, and four radio markets. *Respondents could check all that applied.*

## DATA AS A WHOLE: 155 STATIONS

### 155 radio and television stations reporting

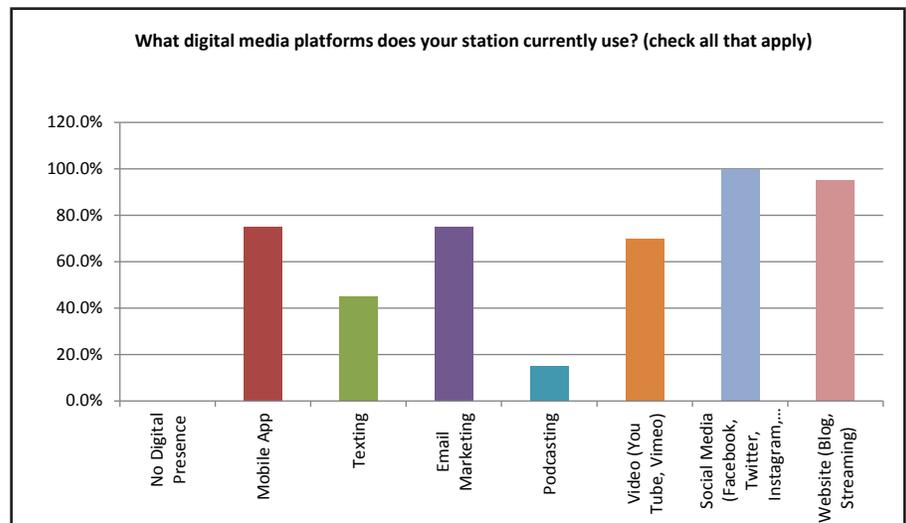
- 96.3% use social media
- 91.4% have a website or streaming service
- 65.4% have a mobile app
- 60.5% use email marketing
- 49.4% have a video channel
- 40.7% use texting
- 32.1% are podcasting

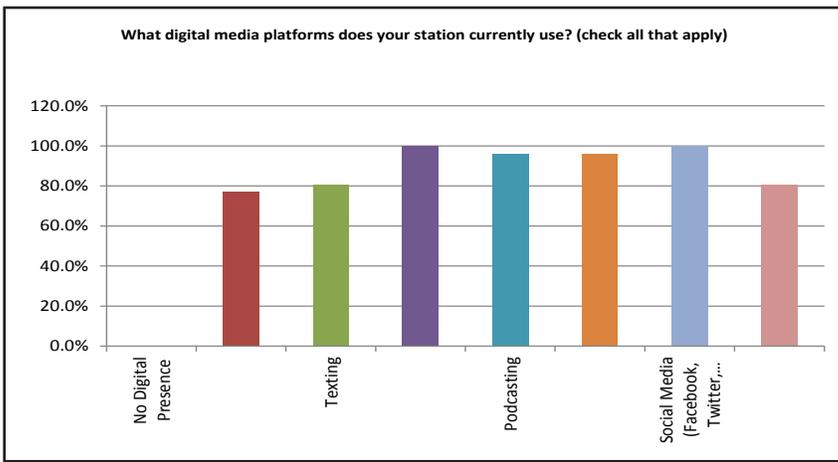


## DATA BREAKOUT: TELEVISION STATIONS

### 20 television stations reporting

- 100% use social media
- 95% have a website or streaming service
- 75% have a mobile app
- 75% use email marketing
- 70% have a video channel
- 45% use texting
- 15% are podcasting

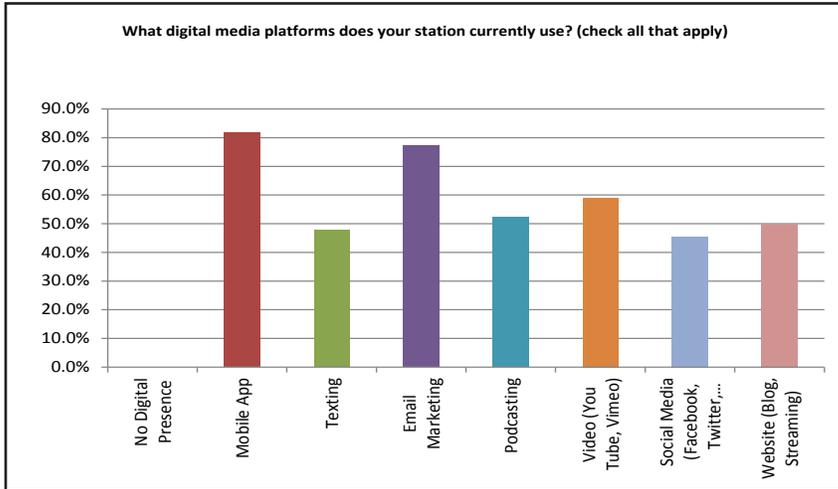




## DATA BREAKOUT: RADIO MARKET 1

26 stations reporting

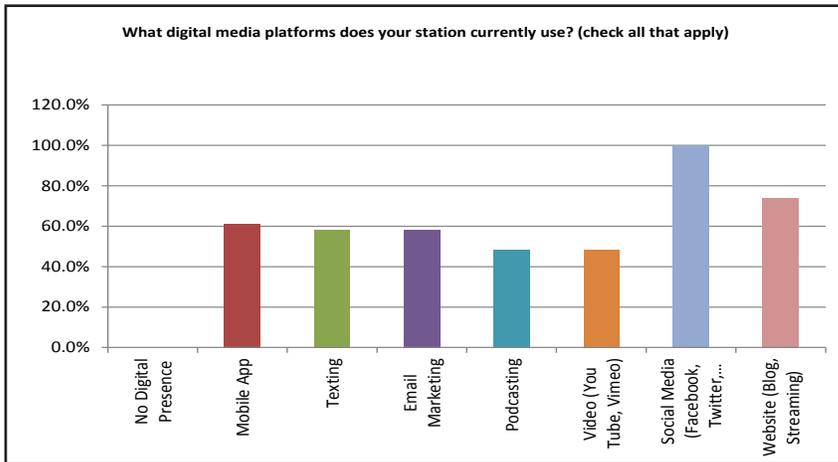
- 100% use social media
- 80.8% have a website or streaming service
- 76.9% have a mobile app
- 100% use email marketing
- 96.2% have a video channel
- 80.8% use texting
- 96.2% are podcasting



## DATA BREAKOUT: RADIO MARKET 2

44 stations reporting

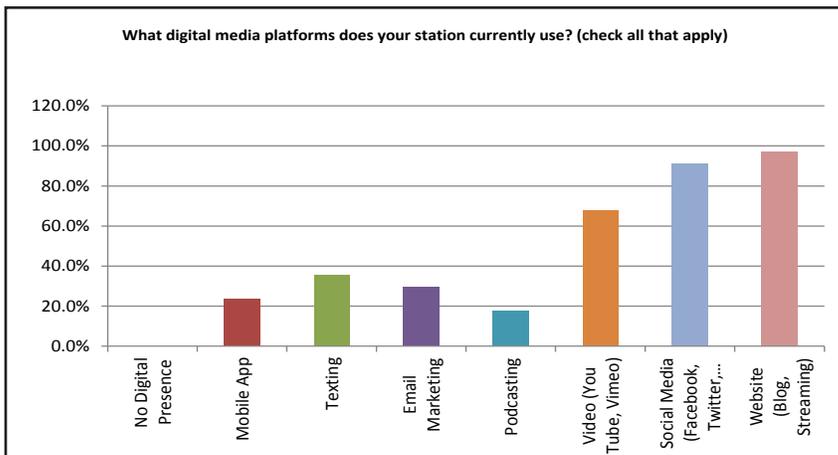
- 45.5% use social media
- 50% have a website or streaming service
- 81.8% have a mobile app
- 77.3% use email marketing
- 59.1% have a video channel
- 47.7% use texting
- 52.3% are podcasting



## DATA BREAKOUT: RADIO MARKET 3

31 stations reporting

- 100% use social media
- 74.2% have a website or streaming service
- 61.3% have a mobile app
- 58.1% use email marketing
- 48.4% have a video channel
- 58.1% use texting
- 48.4% are podcasting



## DATA BREAKOUT: RADIO MARKET 4

34 stations reporting

- 91.2% use social media
- 97.1% have a website or streaming service
- 23.5% have a mobile app
- 29.4% use email marketing
- 67.6% have a video channel
- 35.3% use texting
- 17.6% are podcasting

# WHAT TYPES OF MOBILE APP ADVERTISING DO MICHIGAN BROADCASTERS OFFER CLIENTS?

Approximately 58% of respondents, or 90 stations represented here, have a mobile app. All mobile apps are available for download on the Apple store, while 86% of apps are available on the Google Play store. Less than 25% of stations make their app download available on their website.

Stations were then asked what types of mobile app advertising is currently available to station clients on their mobile apps.

The charts below and on the following page detail the answers to this question. The data is broken into all stations, TV stations, and four radio markets. *Respondents could check all that applied.*

## DATA AS A WHOLE: 90 STATIONS

### 90 radio and television stations reporting

86.3% offer banner ads

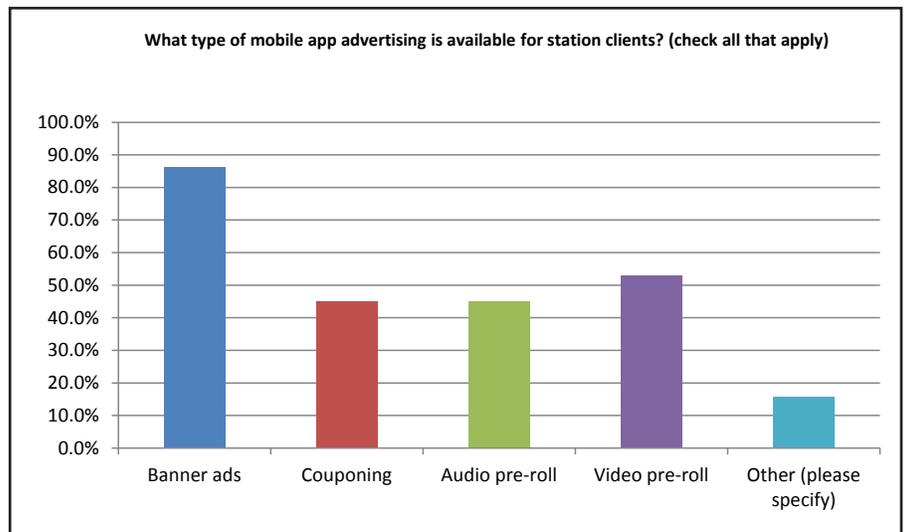
45.1% offer couponing

45.1% offer audio pre-roll

52.9% offer video pre-roll

15.7% "other":

- audio commercials (not pre-roll)
- 300x250 available in future
- client advertising on app coming soon
- featured spots
- in process of updating app
- n/a or unsure



## DATA BREAKOUT: TELEVISION STATIONS

### 15 television stations reporting

93.3% offer banner ads

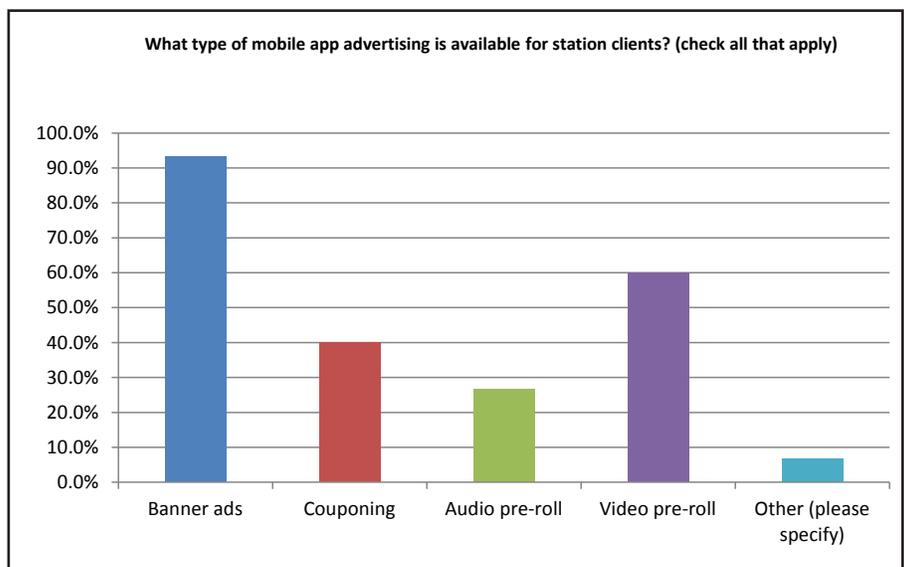
40% offer couponing

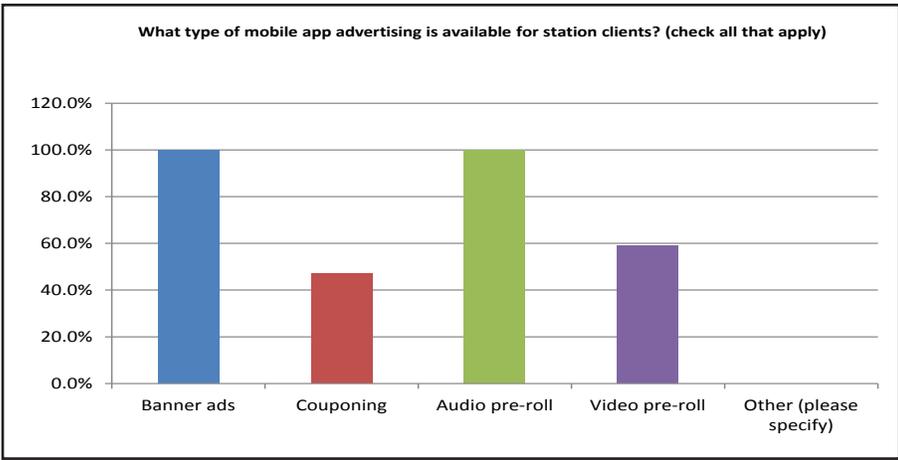
26.7% offer audio pre-roll

60% offer video pre-roll

6.7% "other":

- 300x250 available in future

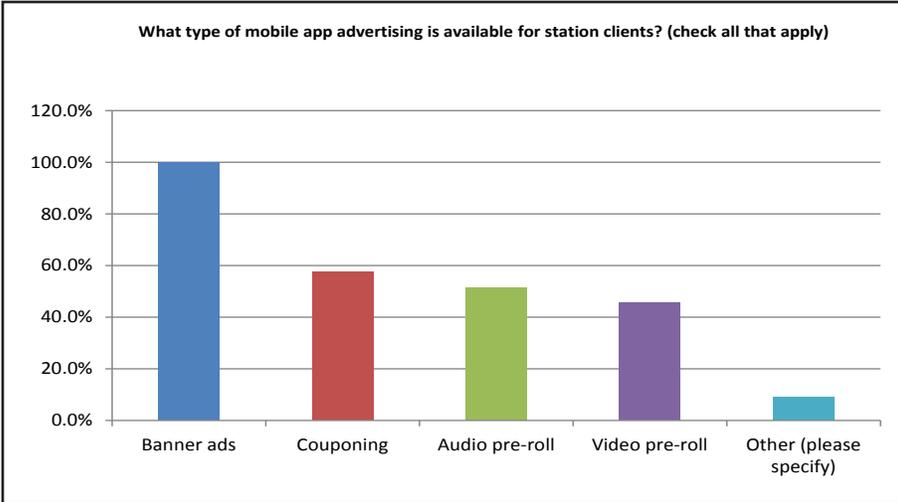




## DATA BREAKOUT: RADIO MARKET 1

17 stations reporting

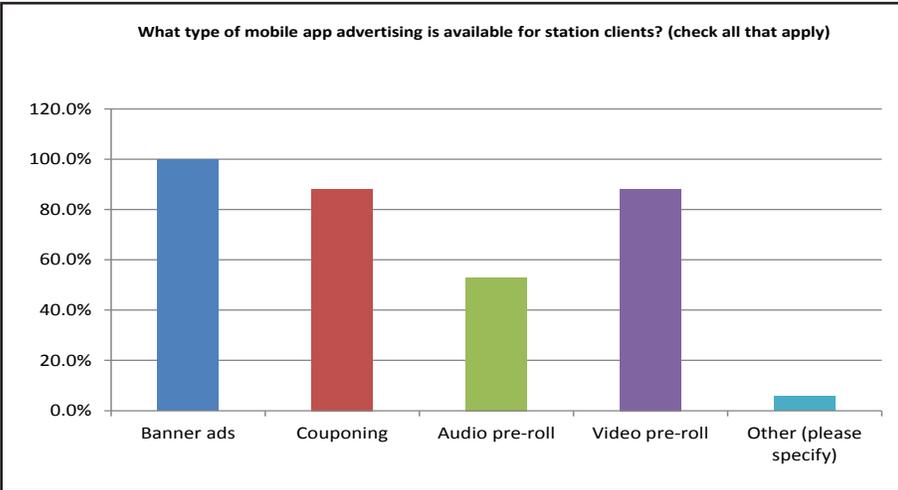
- 100% offer banner ads
- 47.1% offer couponing
- 100% offer audio pre-roll
- 58.8% offer video pre-roll



## DATA BREAKOUT: RADIO MARKET 2

33 stations reporting

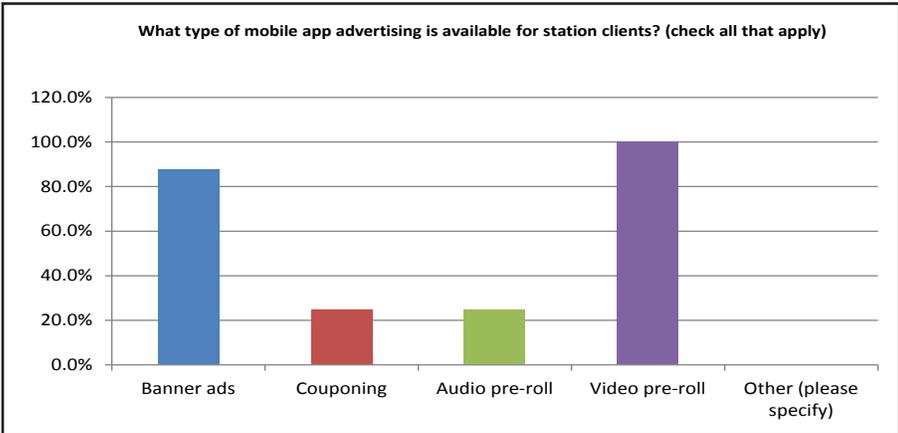
- 100% offer banner ads
- 57.6% offer couponing
- 51.5% offer audio pre-roll
- 45.5% offer video pre-roll
- 9.1% "other":
  - featured spots
  - client advertising on app coming soon
  - audio commercials (not pre-roll)



## DATA BREAKOUT: RADIO MARKET 3

17 stations reporting

- 100% offer banner ads
- 88.2% offer couponing
- 52.9% offer audio pre-roll
- 88.2% offer video pre-roll
- 5.9% "other":
  - in process of updating app



## DATA BREAKOUT: RADIO MARKET 4

8 stations reporting

- 100% offer banner ads
- 25% offer couponing
- 25% offer audio pre-roll
- 100% offer video pre-roll

# WHAT TYPES OF EMAIL MARKETING ADVERTISING DO MICHIGAN BROADCASTERS OFFER CLIENTS?

Approximately 61% of respondents, or 94 stations represented here, use email marketing. Of those 94 stations, just over 51% email weekly, with nearly 7% emailing daily.

Stations were then asked what types of email marketing advertising is currently available to station clients.

The charts below and on the following page detail the answers to this question. The data is broken into all stations, TV stations, and four radio markets. *Respondents could check all that applied.*

## DATA AS A WHOLE: 94 STATIONS

### 94 radio and television stations reporting

73.5% offer sponsored content

16.3% offer guest articles

42.9% offer links

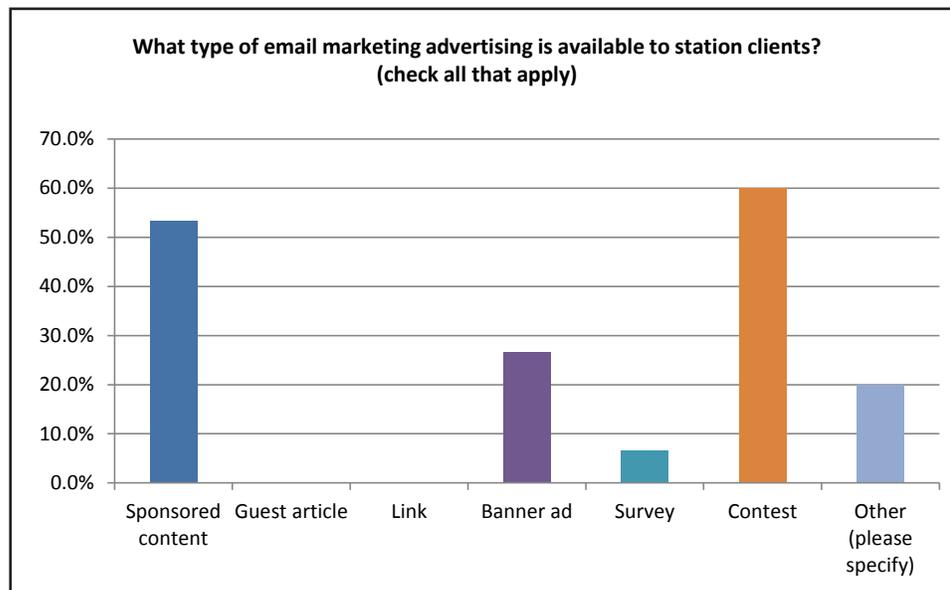
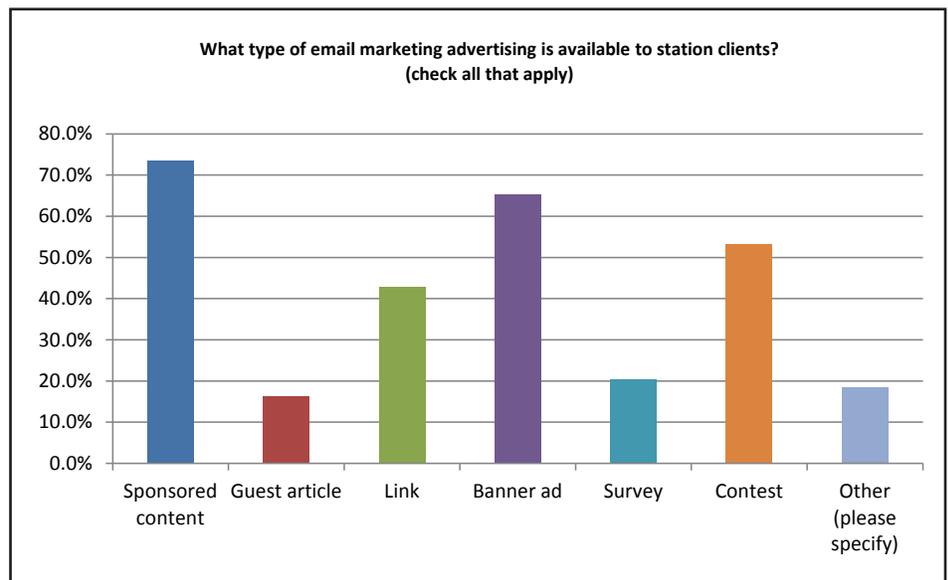
65.3% offer banner ads

20.4% offer surveys

53.1% offer contests

18.4% "other":

- how-to articles on effective radio marketing and advertising practices
- couponing
- n/a or don't know
- not available
- emails marketing sold to clients, no sponsoring



## DATA BREAKOUT: TELEVISION STATIONS

### 15 television stations reporting

53.3% offer sponsored content

0% offer guest articles

0% offer links

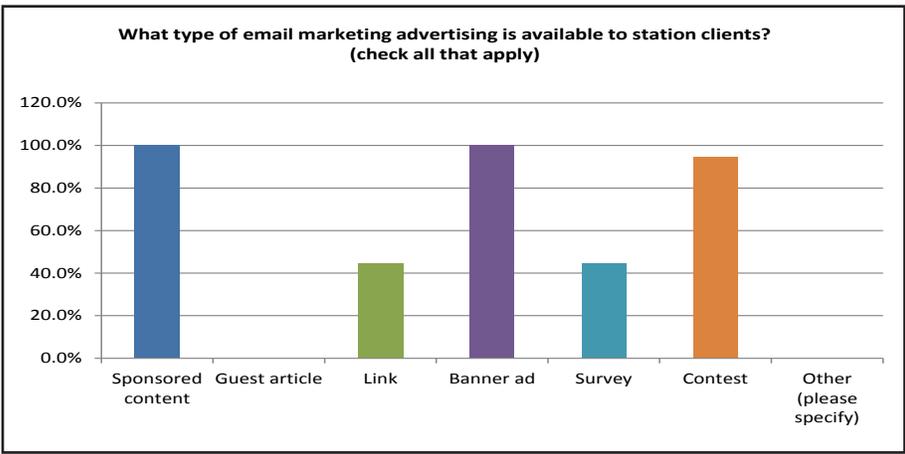
26.7% offer banner ads

6.7% offer surveys

60% offer contests

20% "other":

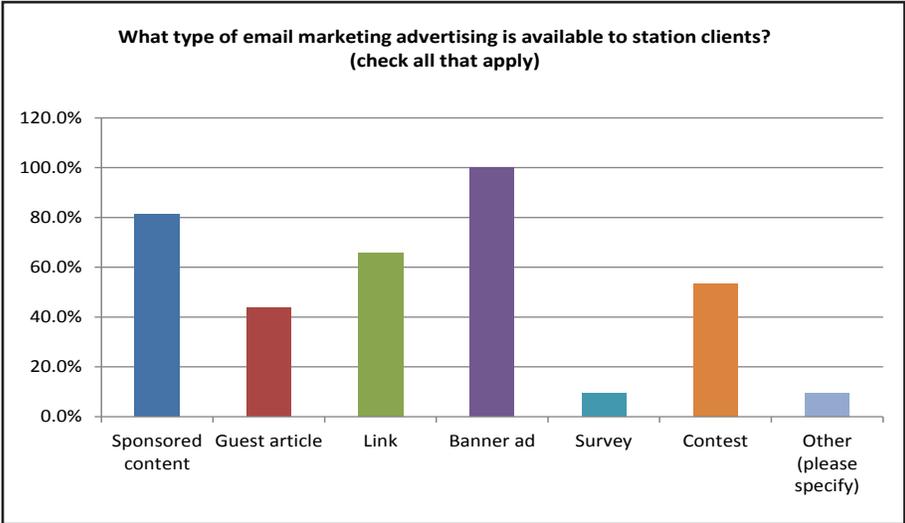
- email marketing sold to clients, no sponsoring
- n/a or don't know
- not available



**DATA BREAKOUT:  
RADIO MARKET 1**

18 stations reporting

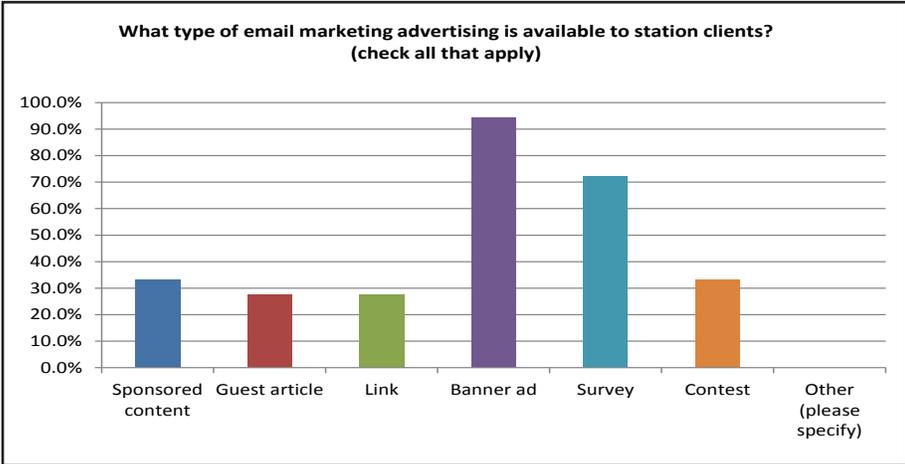
- 100% offer sponsored content
- 0% offer guest articles
- 44.4% offer links
- 100% offer banner ads
- 44.4% offer surveys
- 94.4% offer contests



**DATA BREAKOUT:  
RADIO MARKET 2**

32 stations reporting

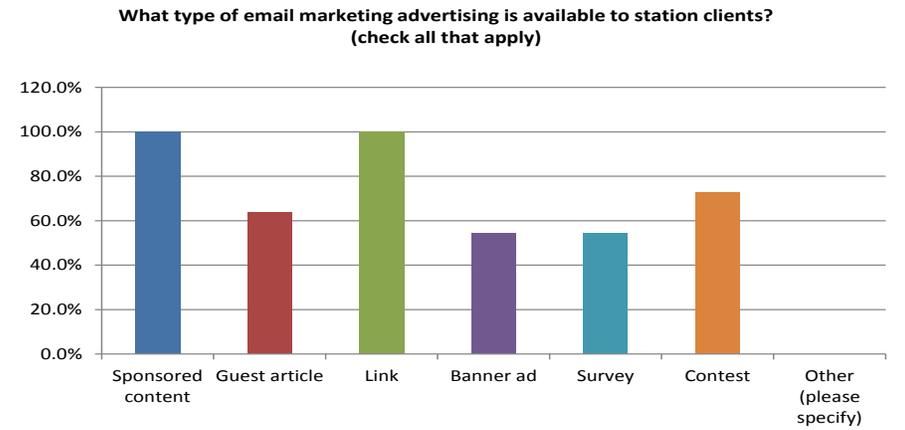
- 81.3% offer sponsored content
- 43.8% offer guest articles
- 65.6% offer links
- 100% offer banner ads
- 9.4% offer surveys
- 53.1% offer contests
- 9.4% "other":
  - not available
  - couponing
  - how-to articles on effective radio marketing and advertising practices



**DATA BREAKOUT:  
RADIO MARKET 3**

18 stations reporting

- 33.3% offer sponsored content
- 27.8% offer guest articles
- 27.8% offer links
- 94.4% offer banner ads
- 72.2% offer surveys
- 33.3% offer contests



**DATA BREAKOUT:  
RADIO MARKET 4**

11 stations reporting

- 100% offer sponsored content
- 63.6% offer guest articles
- 100% offer links
- 54.5% offer banner ads
- 54.5% offer surveys
- 72.7% offer contests

# HOW ARE MICHIGAN BROADCASTERS USING FACEBOOK?

Over 80% of stations surveyed, or 125 stations represented, say they have a Facebook page.

Stations were then asked what types of content they post to Facebook, as well as how often they post content to Facebook. According to this data, the most popular type of content shared to Facebook is station promotion, followed by trending topics and community service.

The charts below and on the following pages detail the answers to these questions. The data is broken into all stations, TV stations, and four radio markets.

## HOW OFTEN DO YOU UPDATE FACEBOOK?

### DATA AS A WHOLE: 125 STATIONS

125 radio and television stations reporting

64.2% update multiple times a day

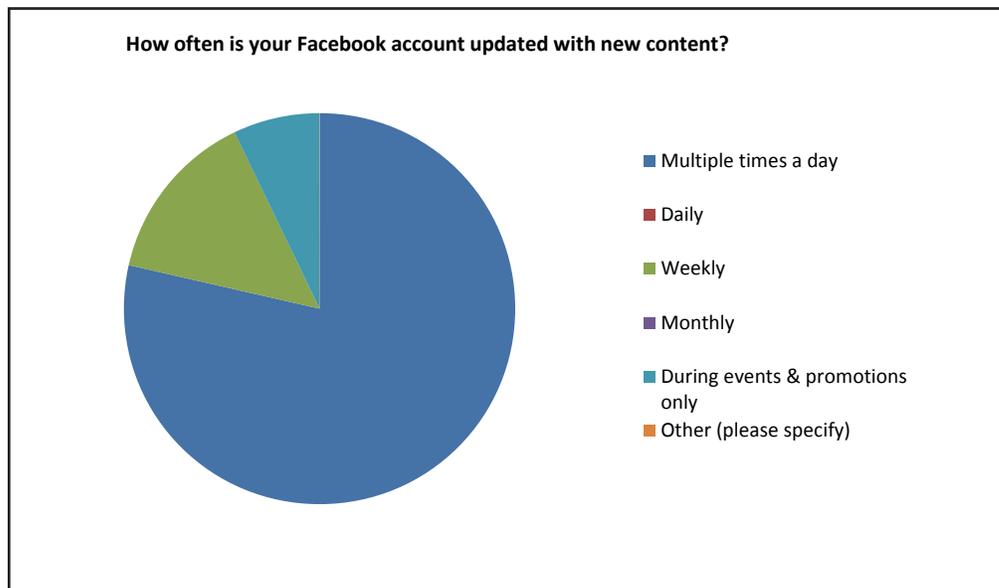
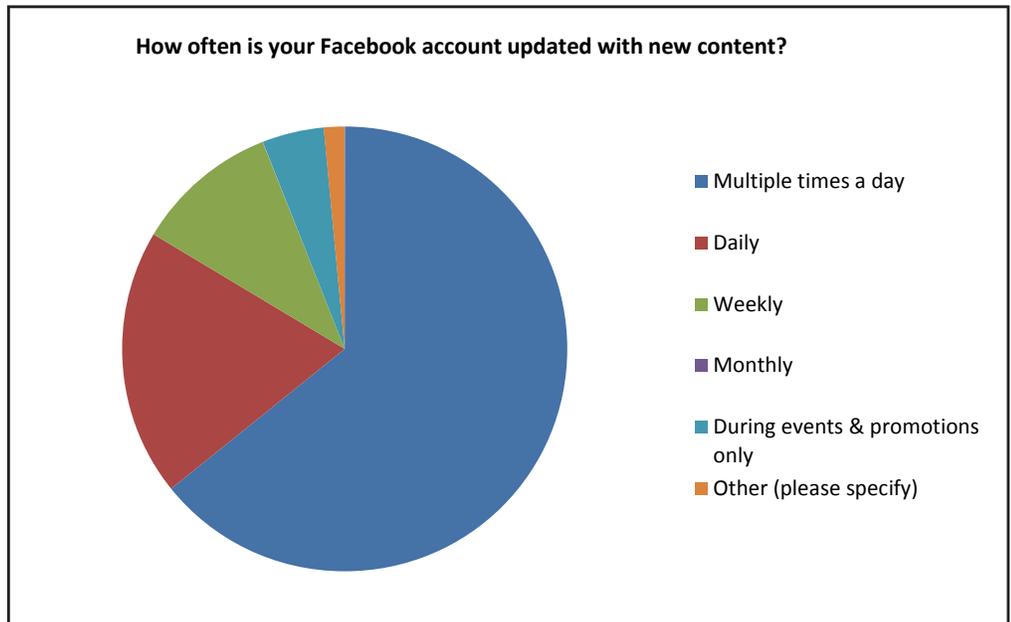
19.4% update daily

10.4% update weekly

0% update monthly

4.5% update during events and promotions only

1.5% "other":  
- depends on the station



### DATA BREAKOUT: TELEVISION STATIONS

14 television stations reporting

78.6% update multiple times a day

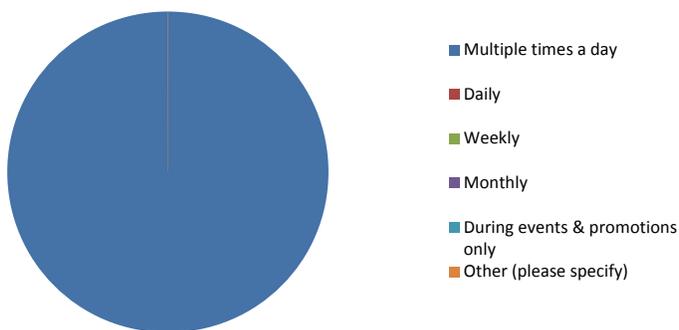
0% update daily

14.3% update weekly

0% update monthly

7.1% update during events and promotions only

How often is your Facebook account updated with new content?

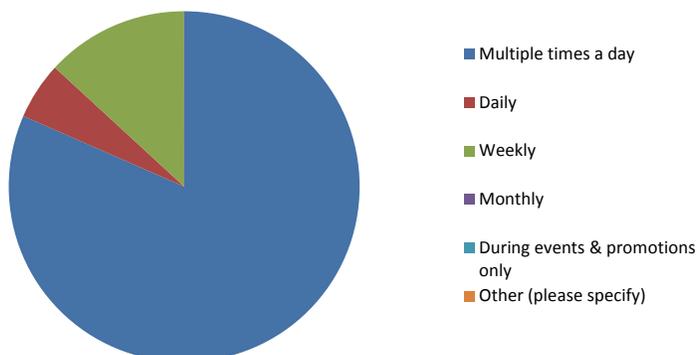


## DATA BREAKOUT: RADIO MARKET 1

12 stations reporting

100% update multiple times a day

How often is your Facebook account updated with new content?



## DATA BREAKOUT: RADIO MARKET 2

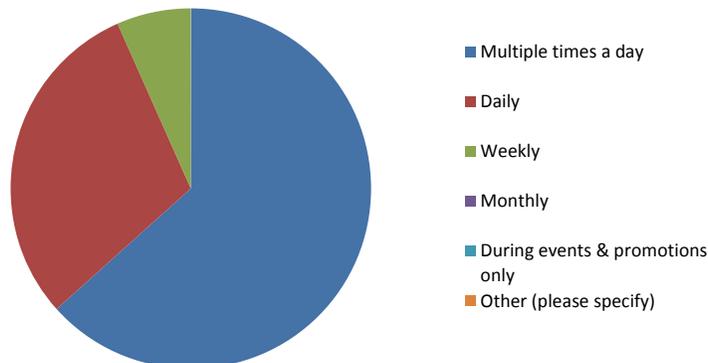
38 stations reporting

81.6% update multiple times a day

5.3% update daily

13.2% update weekly

How often is your Facebook account updated with new content?



## DATA BREAKOUT: RADIO MARKET 3

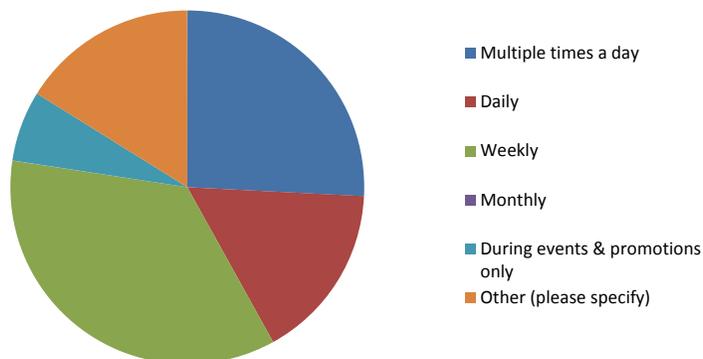
30 stations reporting

63.3% update multiple times a day

30% update daily

6.7% update weekly

How often is your Facebook account updated with new content?



## DATA BREAKOUT: RADIO MARKET 4

31 stations reporting

25.8% update multiple times a day

16.1% update daily

35.5% update weekly

6.5% update during events and promotions only

16.1% "other":

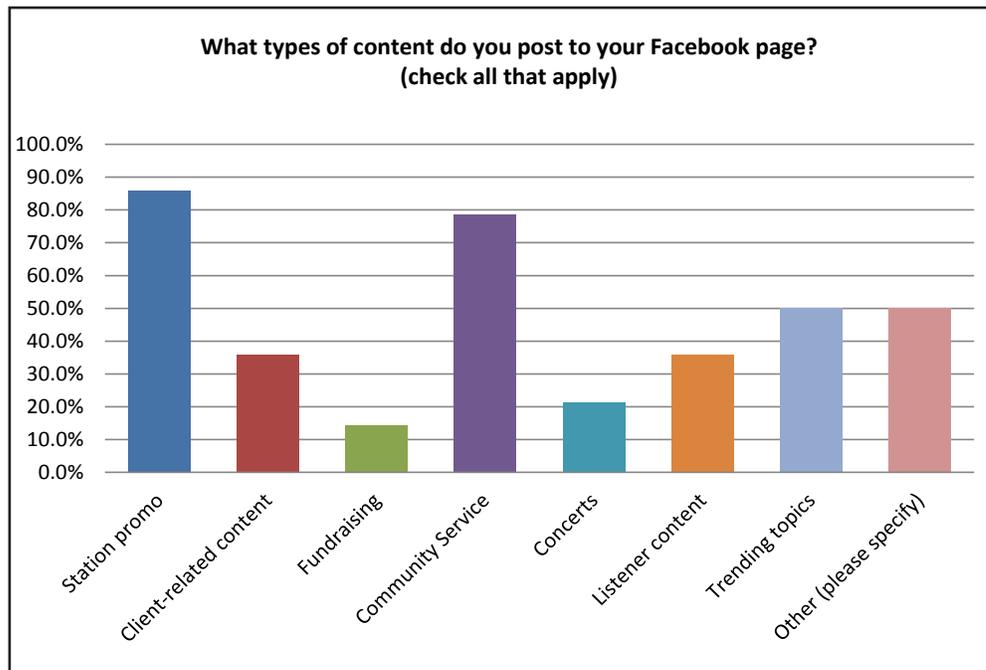
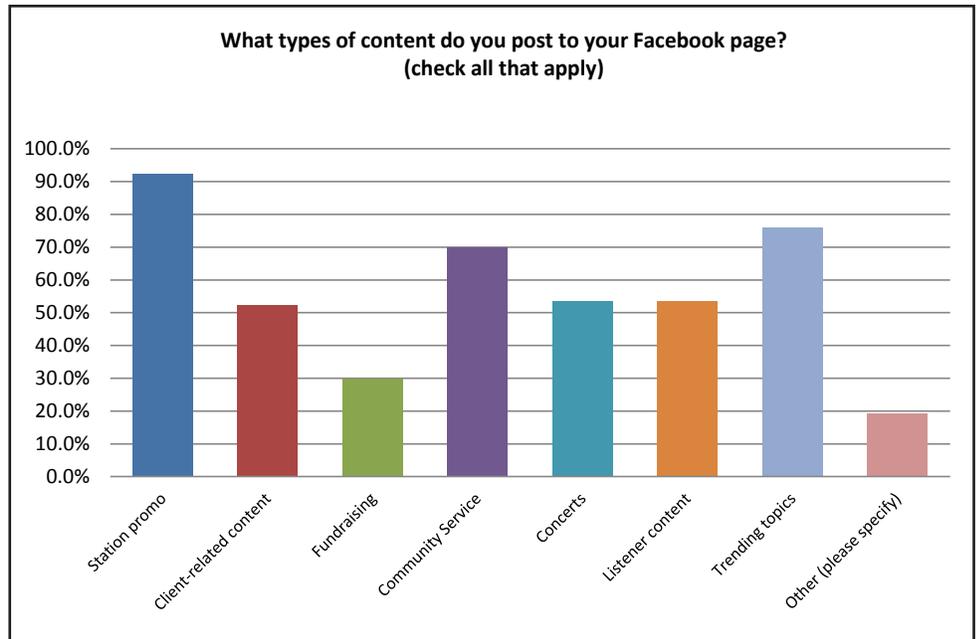
- depends on the station

# WHAT TYPES OF CONTENT DO YOU POST TO FACEBOOK?

## DATA AS A WHOLE: 125 STATIONS

125 radio and television stations reporting

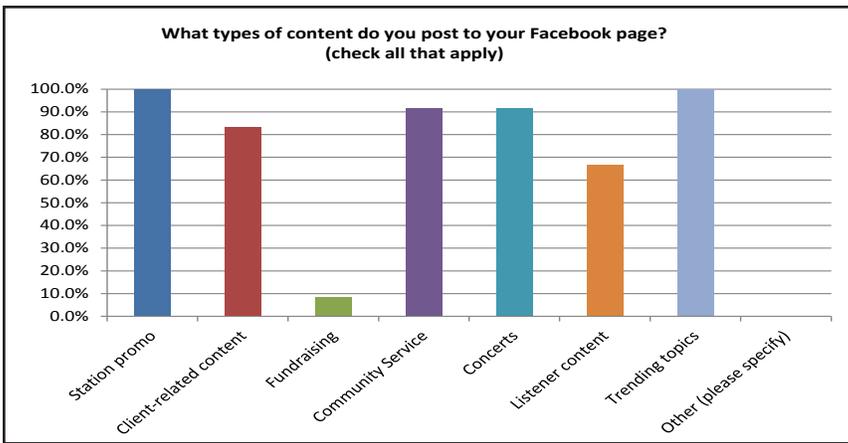
- 92.5% - station promotion
- 52.2% - client-related content
- 29.9% - fundraising
- 70.1% - community service
- 53.7% - concerts
- 53.7% - listener content
- 76.1% - trending topics
- 19.4% - other:
  - contest
  - on-air talent's content
  - news stories
  - links to website content
  - company information



## DATA BREAKOUT: TELEVISION STATIONS

14 television stations reporting

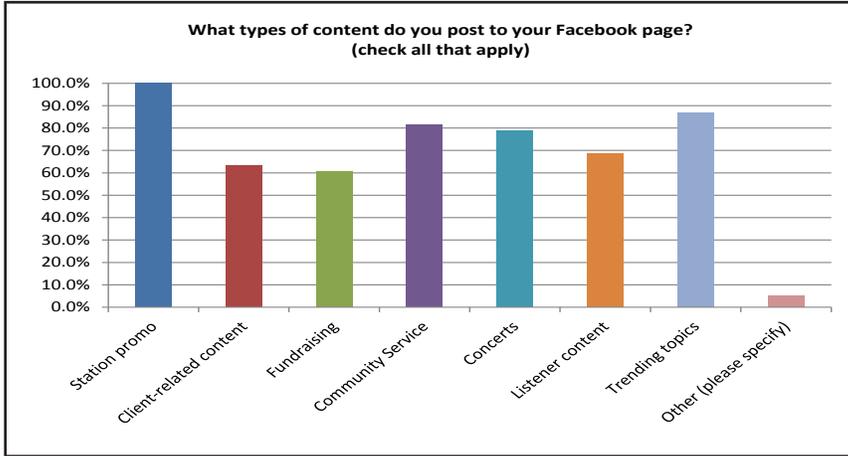
- 85.7% - station promotion
- 35.7% - client-related content
- 14.3% - fundraising
- 78.6% - community service
- 21.4% - concerts
- 35.7% - listener content
- 50% - trending topics
- 50% - other:
  - news stories
  - links to website content



## DATA BREAKOUT: RADIO MARKET 1

12 stations reporting

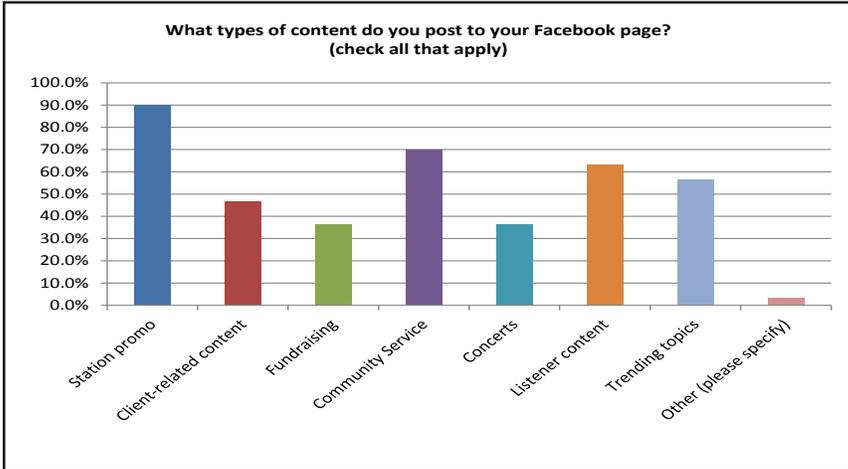
100% - station promotion  
 83.3% - client-related content  
 8.3% - fundraising  
 91.7% - community service  
 91.7% - concerts  
 66.7% - listener content  
 100% - trending topics



## DATA BREAKOUT: RADIO MARKET 2

38 stations reporting

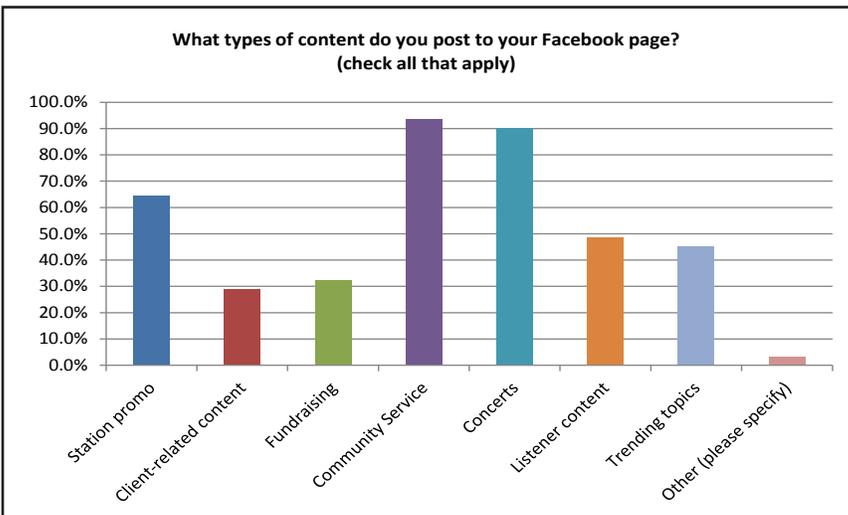
100% - station promotion  
 63.2% - client-related content  
 60.5% - fundraising  
 81.6% - community service  
 78.9% - concerts  
 68.4% - listener content  
 86.8% - trending topics  
 5.3% - "other":  
 - news stories  
 - on-air-talent's content



## DATA BREAKOUT: RADIO MARKET 3

30 stations reporting

90% - station promotion  
 46.7% - client-related content  
 36.7% - fundraising  
 70% - community service  
 36.7% - concerts  
 63.3% - listener content  
 56.7% - trending topics  
 3.3% - "other":  
 - news stories



## DATA BREAKOUT: RADIO MARKET 4

31 stations reporting

64.5% - station promotion  
 29% - client-related content  
 32.3% - fundraising  
 93.5% - community service  
 90.3% - concerts  
 48.4% - listener content  
 45.2% - trending topics  
 3.2% - "other":  
 - news stories

# HOW ARE MICHIGAN BROADCASTERS USING TWITTER?

80% of stations surveyed, or 124 stations represented, say they have a Twitter account.

Stations were then asked how often they post content to Twitter. Overall, broadcasters are updating multiple times a day.

The charts below and on the following page detail the answers to this question. The data is broken into all stations, TV stations, and four radio markets.

## HOW OFTEN DO YOU UPDATE TWITTER?

### DATA AS A WHOLE: 124 STATIONS

124 radio and television stations reporting

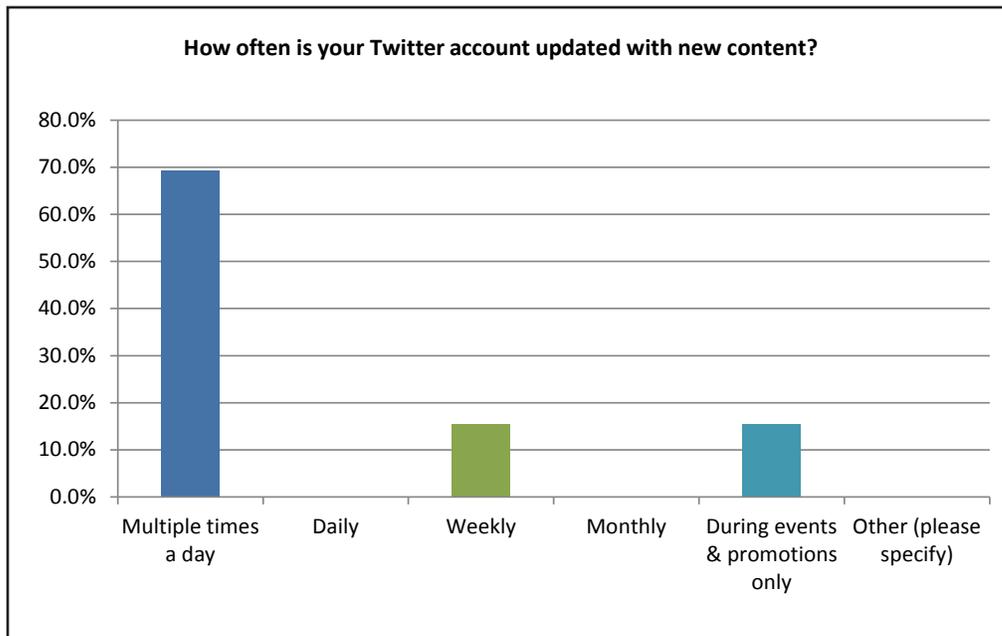
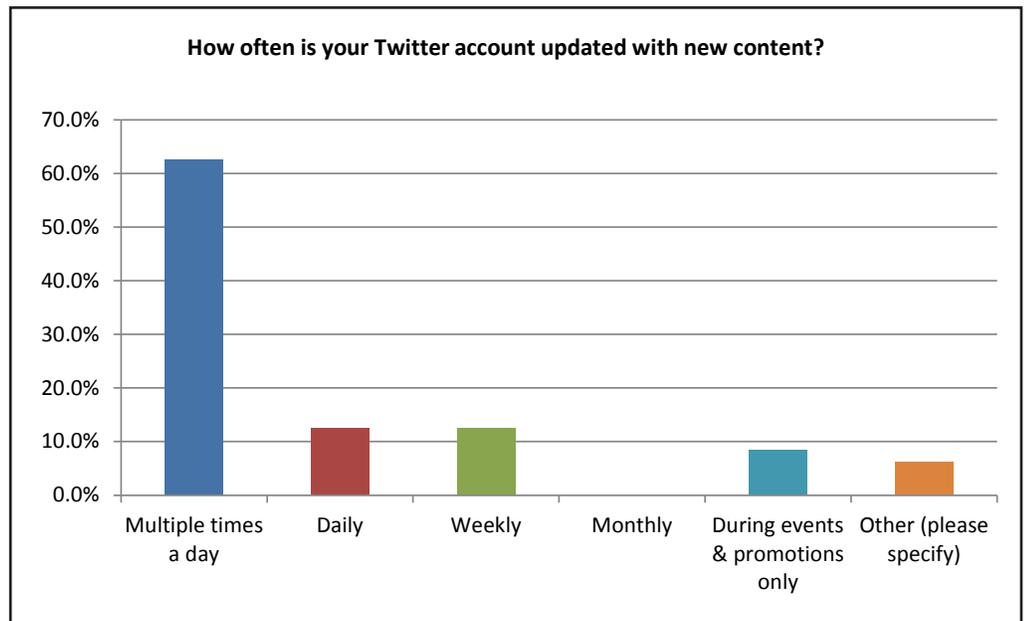
62.5% update multiple times a day

12.5% update daily

12.5% update weekly

8.3% update during events and promotions only

6.3% "other":  
- rarely update  
- Facebook entries cross-post



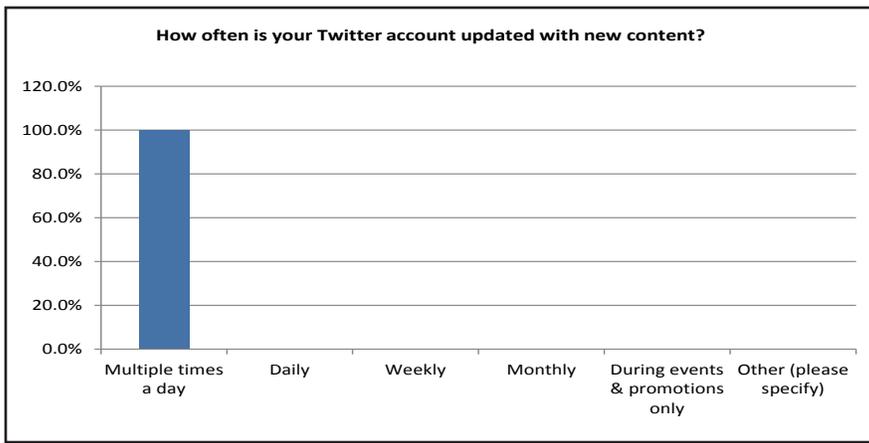
### DATA BREAKOUT: TELEVISION STATIONS

13 television stations reporting

69.2% update multiple times a day

15.4% update weekly

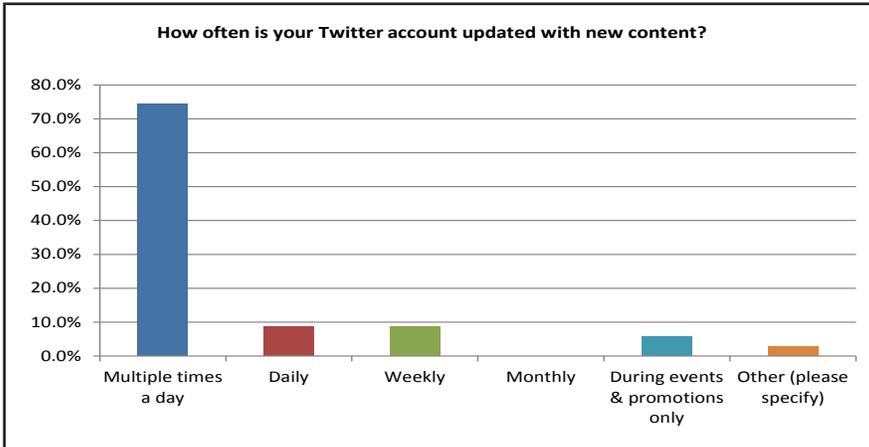
15.4% update during events and promotions only



## DATA BREAKOUT: RADIO MARKET 1

11 stations reporting

100% - update multiple times a day



## DATA BREAKOUT: RADIO MARKET 2

11 stations reporting

74.3% - update multiple times a day

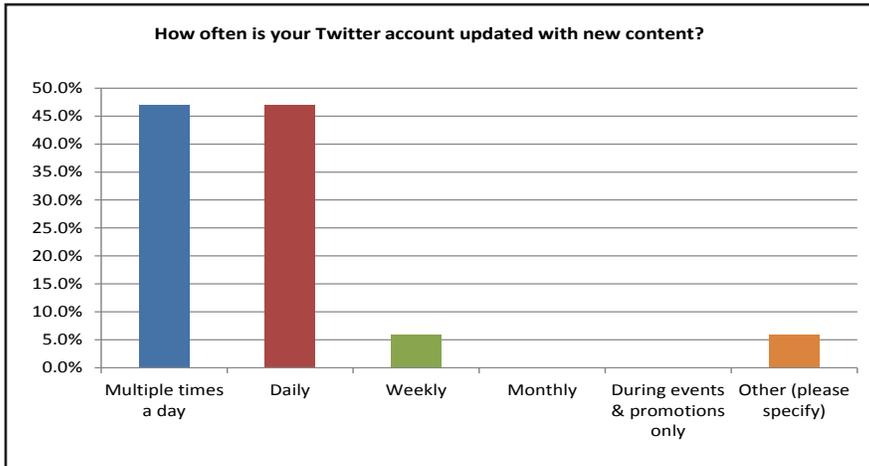
8.6% - update daily

8.6% - update weekly

5.7% - update during events & promotions only

2.9% - "other":

-



## DATA BREAKOUT: RADIO MARKET 3

17 stations reporting

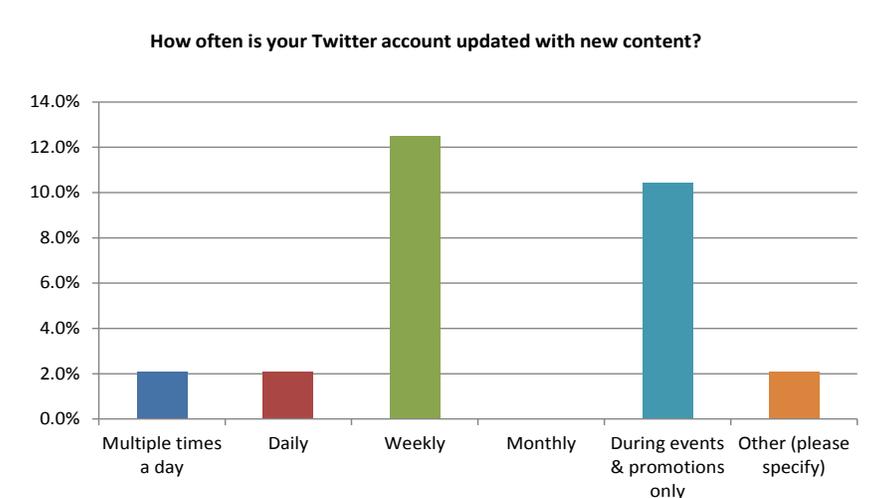
47.1% - update multiple times a day

47.1% - update daily

5.9% - update weekly

5.9% - "other":

-



## DATA BREAKOUT: RADIO MARKET 4

48 stations reporting

2.1% - update multiple times a day

2.1% - update daily

12.5% - update weekly

10.4% - update during events & promotions only

2.1% - "other":

-

## HOW ARE MICHIGAN BROADCASTERS USING THEIR WEBSITES?

Approximately 78% of all respondents (121 stations represented in the census) answered our question about how many website visitors they get per month. Adding up those numbers gives us a cumulative approximate number of 46.2 million + website visitors per month for our radio and television stations across Michigan.

**98% of respondents to this question (152 stations represented) say that they offer paid advertising to station clients on their websites.** Stations were then asked how often their websites are updated with new content. Overall, Michigan broadcasters are updating their websites daily, with fewer than ten percent updating monthly.

The charts below and on the following page detail the answers to this question. The data is broken into all stations, TV stations, and four radio markets.

### HOW OFTEN DO YOU UPDATE YOUR WEBSITE?

#### DATA AS A WHOLE: 118 STATIONS

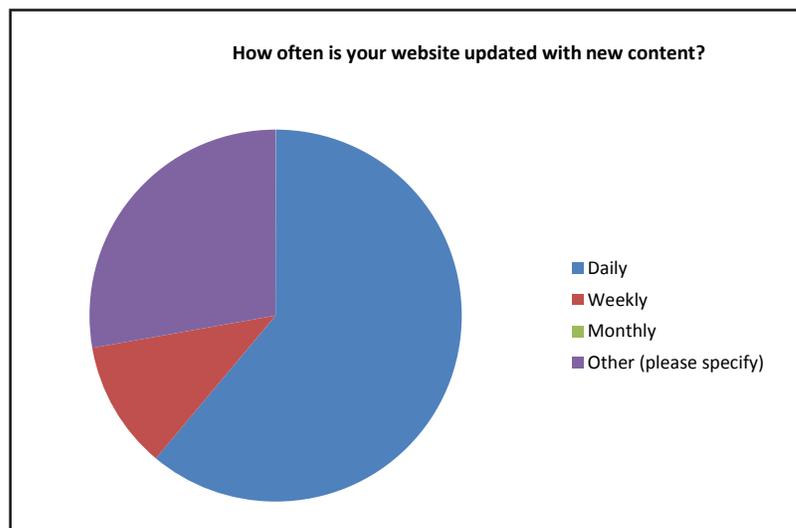
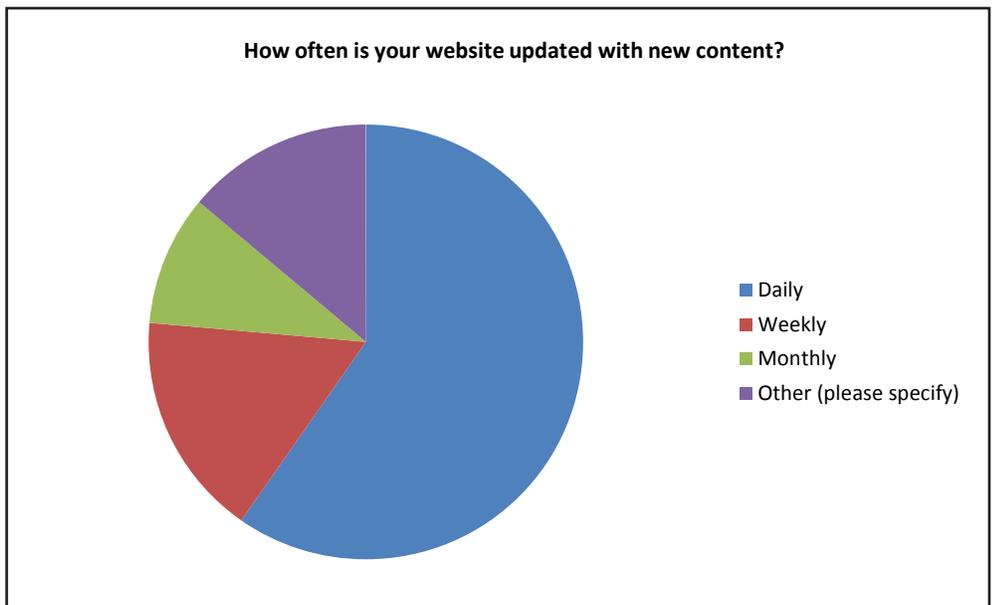
118 radio and television stations reporting

59.7% update daily

16.7% update weekly

9.7% update monthly

13.9% "other":  
- working to improve content now  
- constantly  
- hourly  
- multiple times a day  
- handled by corporate



#### DATA BREAKOUT: TELEVISION STATIONS

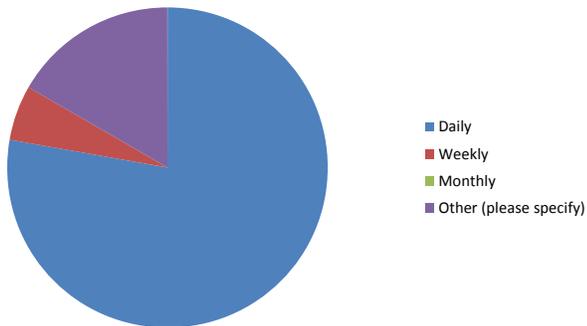
13 television stations reporting

84.6% update daily

15.4% update weekly

38.5% "other":  
- constantly  
- multiple times a day  
- handled by corporate

How often is your website updated with new content?

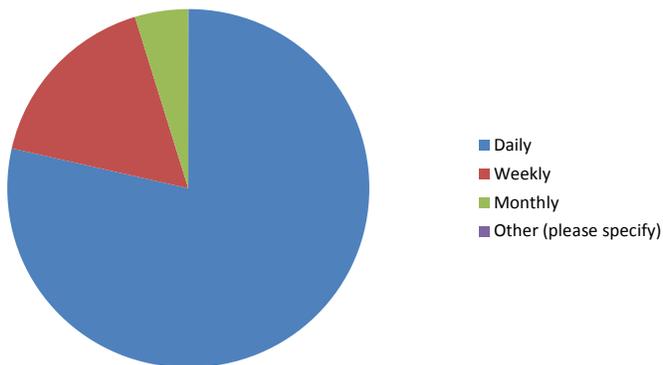


## DATA BREAKOUT: RADIO MARKET 1

18 stations reporting

- 100% - update daily
- 5.6% - update weekly
- 16.7% - "other":
- multiple times a day

How often is your website updated with new content?

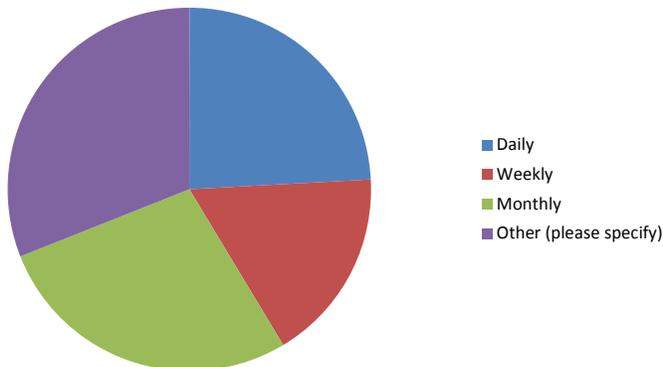


## DATA BREAKOUT: RADIO MARKET 2

42 stations reporting

- 78.6% - update daily
- 16.7% - update weekly
- 4.8% - update monthly

How often is your website updated with new content?

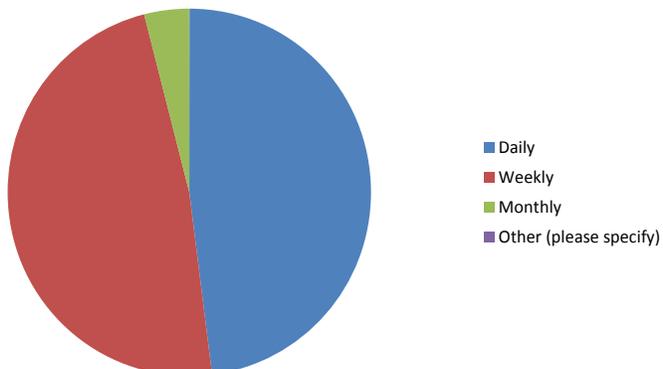


## DATA BREAKOUT: RADIO MARKET 3

20 stations reporting

- 35% - update daily
- 25% - update weekly
- 40% - update monthly
- 45% - "other":
- hourly
- working to improve content now

How often is your website updated with new content?



## DATA BREAKOUT: RADIO MARKET 4

25 stations reporting

- 48% - update daily
- 48% - update weekly
- 4% - update monthly

# HOW MUCH REVENUE ARE MICHIGAN BROADCASTERS MAKING WITH THEIR **DIGITAL MEDIA PLATFORMS**?

Approximately 28% of all respondents (about 43 stations) gave us annual budget numbers. Using the responses provided from those 43 stations gives us **an average of \$25,243 spent per year** to maintain their current digital media platforms.

Almost 77% of stations surveyed (about 119 stations) provided us with a percentage of their annual revenue that comes from all their digital media platforms combined. The vast majority of our stations track an annual revenue of between 0 and 10%.

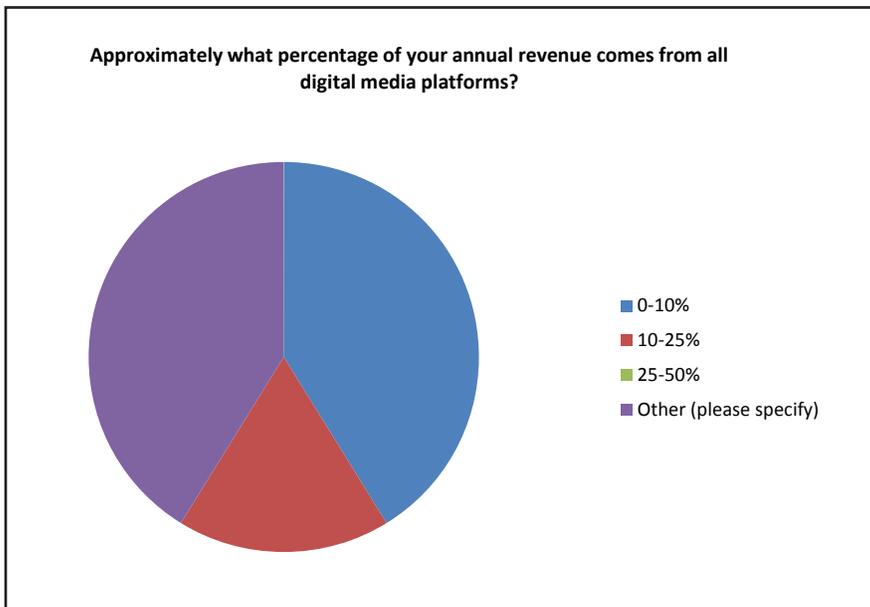
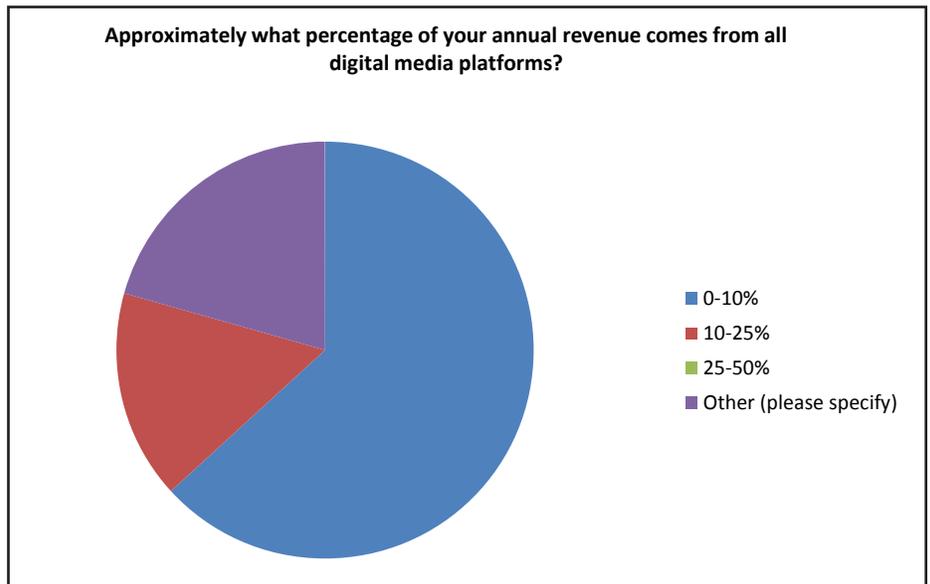
The charts below and on the following page gives a breakdown of these percentages.

## WHAT PERCENTAGE OF **ANNUAL REVENUE** COMES FROM ALL **DIGITAL MEDIA PLATFORMS**?

### DATA AS A WHOLE: **119 STATIONS**

**119 radio and television stations reporting**

- 63.2% - 0-10% range
- 16.2% - 10-25% range
- 20.6% "other":
  - n/a
  - don't know
  - handled by corporate

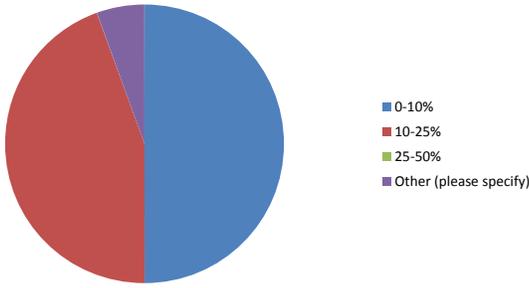


### DATA BREAKOUT: **TELEVISION STATIONS**

**17 television stations reporting**

- 41.2% - 0-10% range
- 17.6% - 10-25% range
- 41.2% "other":
  - don't know

Approximately what percentage of your annual revenue comes from all digital media platforms?



## DATA BREAKOUT: RADIO MARKET 1

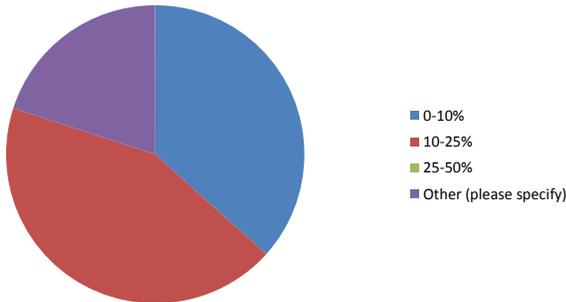
18 stations reporting

50% - 0-10% range

44.4% - 10-25% range

5.6% "other":  
- don't know

Approximately what percentage of your annual revenue comes from all digital media platforms?



## DATA BREAKOUT: RADIO MARKET 2

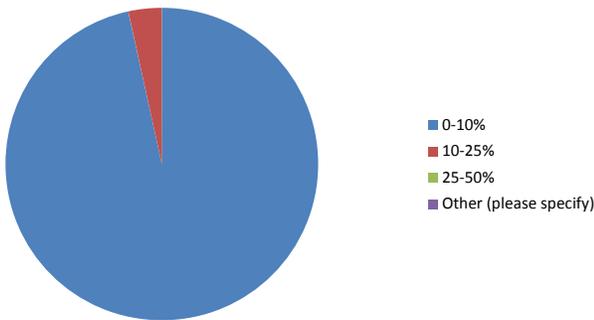
30 stations reporting

36.7% - 0-10% range

43.3% - 10-25% range

20% "other":  
- don't know

Approximately what percentage of your annual revenue comes from all digital media platforms?



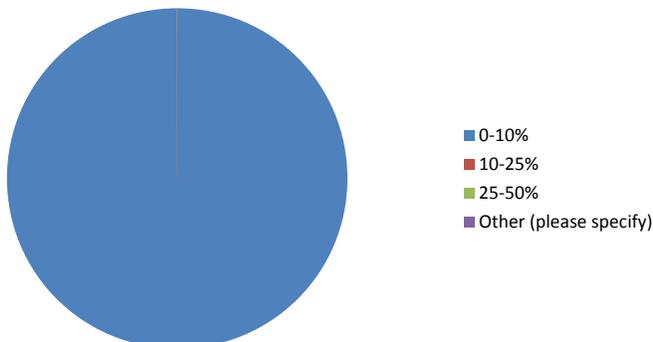
## DATA BREAKOUT: RADIO MARKET 3

29 stations reporting

96.6% - 0-10% range

3.4% - 10-25% range

Approximately what percentage of your annual revenue comes from all digital media platforms?



## DATA BREAKOUT: RADIO MARKET 4

25 stations reporting

100% - 0-10% range

# RECOMMENDATIONS FOR MICHIGAN BROADCASTERS

As we prepared the census data for distribution to our members and other key players in the broadcast industry, it was important to frame it both as a way of understanding what broadcasters are doing right now, as well as how and where they can continue to improve and iterate their digital media strategies in the future.

**It is clear that the broadcast industry in Michigan has a broad reach to consumers throughout the television and radio markets.**

It is also clear that there is a lot of untapped potential and room for growth and improvement.

According to the *2015 State of Digital Marketing* report (by [webmarketing123.com](http://webmarketing123.com)), “revenue-driven marketing is the goal, but not always the practice.” For our broadcasters, it is obvious from the data that while some of them have a way of measuring ROI, many still do not. It is difficult to gauge annual revenue without an ROI model, so the first recommendation for broadcasters is to **develop an ROI model for digital media advertising.**

Ways to do this include developing personas, determining which platform caters to which type of consumer, and developing a strategy that includes a posting schedule and a tracking metric.

That being said, there is still so much movement in the digital space that often the ‘gut instinct’ of marketing on a certain platform will trump the necessity of gaining measurable metrics. We strongly encourage our broadcasters to continue utilizing their digital media platforms, and our second recommendation is to **choose only one new digital platform to focus on at a time.**

**In our initial summary of this data, we recommended that broadcasters consider Instagram and podcasting as two new potential digital platforms.**

**Instagram** is a growing trend in social media in the world, and this is reflected in our survey data. While many stations do not yet have an Instagram account (approximately 21% of all respondents currently have one, while 79% did not), many of them have plans to implement this into their digital media strategy in the next six to twelve months.

According to the Pew Research Center, 28% of online adults are using Instagram. 55% of online adults ages 18 to 29 use Instagram. The PRC also reports that 59% of Instagram users are on the platform daily, and 35% of users visit several times a day. (<http://www.pewinternet.org/2015/08/19/the-demographics-of-social-media-users/>)

Additionally, eMarketer has predicted that Instagram will earn \$595 million in ad revenue this year and \$2.81 billion by 2017, surpassing both Twitter and Google. (<http://marketingland.com/forecast-instagram-will-pass-google-twitter-in-mobile-display-ad-revenue-by-2017-136732> and <http://www.emarketer.com/article.aspx?R=1012774>)

**Podcasting** is currently the most underutilized digital media platform our broadcasters have, although it is most suited for the type of content they already produce.

Podcasting is an area of growth for our broadcasters, as demonstrated by the Michigan radio and television stations that are already offering topical podcasts on local sports, film critiques, current science news, genre fiction, Northern Michigan fishing reports, local politics, web-exclusive newscasts, and society & cultural themes. In June 2015, there were over 200,000 podcasts listed on iTunes.

**In conclusion:** Michigan broadcasters are uniquely positioned to continue to touch and market to consumers across the state through various types of digitally available content, taking advantage of the trust relationship that already exists.