


FUTURI

Futuri's Forensic Analysis on Radio and TV Revenue Loss in 2025

June | 2025

AI is systematically deleting radio + TV from ad spend



Ad agencies are using AI-powered platforms such as Media Mix Models (MMMs) and large language models (LLMs) to make advertiser campaign investment decisions.

Futuri studied the output from the LLMs and discovered they consistently omit or materially impact advertising spend recommendations for radio and TV as compared to big tech digital channels.

Agencies and marketers have adopted AI for ad campaign recommendations

Q. To what extent have marketing teams in any organization **adopted AI platforms** into their campaign research and planning workflows?

55%

of marketers use or plan to use AI for campaign strategy
(2024 Salesforce)

91%

of US advertising agencies are actively using or exploring generative AI.
(2024 Forrester)

65%

currently use ChatGPT in planning workflows
(2025 Master Code)

61.4%

of marketers now prioritize AI-driven media mix modeling
(EMarketer)

91%

of CMOs say AI boosts efficiency
(BCG)



Marketers interface with LLMs on a regular basis and Radio and TV are “invisible.”

Q. Which LLMs do marketing teams in any organization **adopt into their campaign research** and planning workflows?

- ChatGPT (OpenAI: GPT-01, GPT 3.5, GPT 4.0)
- Claude (Anthropic)
- Gemini (Google DeepMind)
- Perplexity AI
- Grok (xAI | Elon Musk)
- Mistral (open-source LLM that is gaining traction)
- LLaMA | Meta AI (used in some experimental tools)
- Cohere +AI21 (less common, but integrated into some stacks)

If radio and TV aren't in the system, they are invisible to AI.

Providing properly formatted content and data about radio and TV at every level (local, regional, national, network) assists the AI's understanding of the channel as successful, measurable, and highly effective. This helps increase visibility and increases its inclusion in AI-driven marketing strategy recommendations.

Marketers' software is asking ChatGPT and other LLMs where to spend

Q. What are the **platforms or tools** used by marketers?

TOOL PLATFORM	CURRENT USERS CUSTOMERS
Performance Max (Google)	More than 1-Million advertisers
Omni Assist (Omnicom)	50,000 users
PRophet (Stagwell)	Nearly 400 users
Recast	Not publicly disclosed
Kensho (S&P Global)	Not publicly disclosed
IBM Watson Advertising	6,700+ companies
Persado	Engages 1.2 Billion consumers annually
Albert.ai	Not publicly disclosed
Mutiny	Approximately 680 customers
Drift	5,000+ customers
Adobe Sensei	Not publicly disclosed

These are sources the LLMs often **embed** or “**call**” on the backend.



Digital marketing bias exists in MMMs and LLMs

Q. Are AI platforms and LLMs **biased against traditional media**?



- › **AI favors what it can “see” and understand.** Currently, data from digital marketing is more visible to the LLMs and MMMs.
- › **Data Bias:** AI platforms reproduce the inherent bias in the data they were trained on. *(SurveyMonkey AI Marketing Trends)*
- › **Marketing budgets** skew towards performance over time, creating a loop that reinforces the data bias. *(Warc)*
- › **Digital channels** provide high volumes of timely data, while traditional channels are often under-attributed due to data sparsity. *(Google research on AI-powered MMM)*

This an **opportunity** to **correct the existing digital marketing bias** by “feeding” in TV and radio focused success metrics and customer case studies to “retrain” the AI and change the narrative.

Forensic Analysis

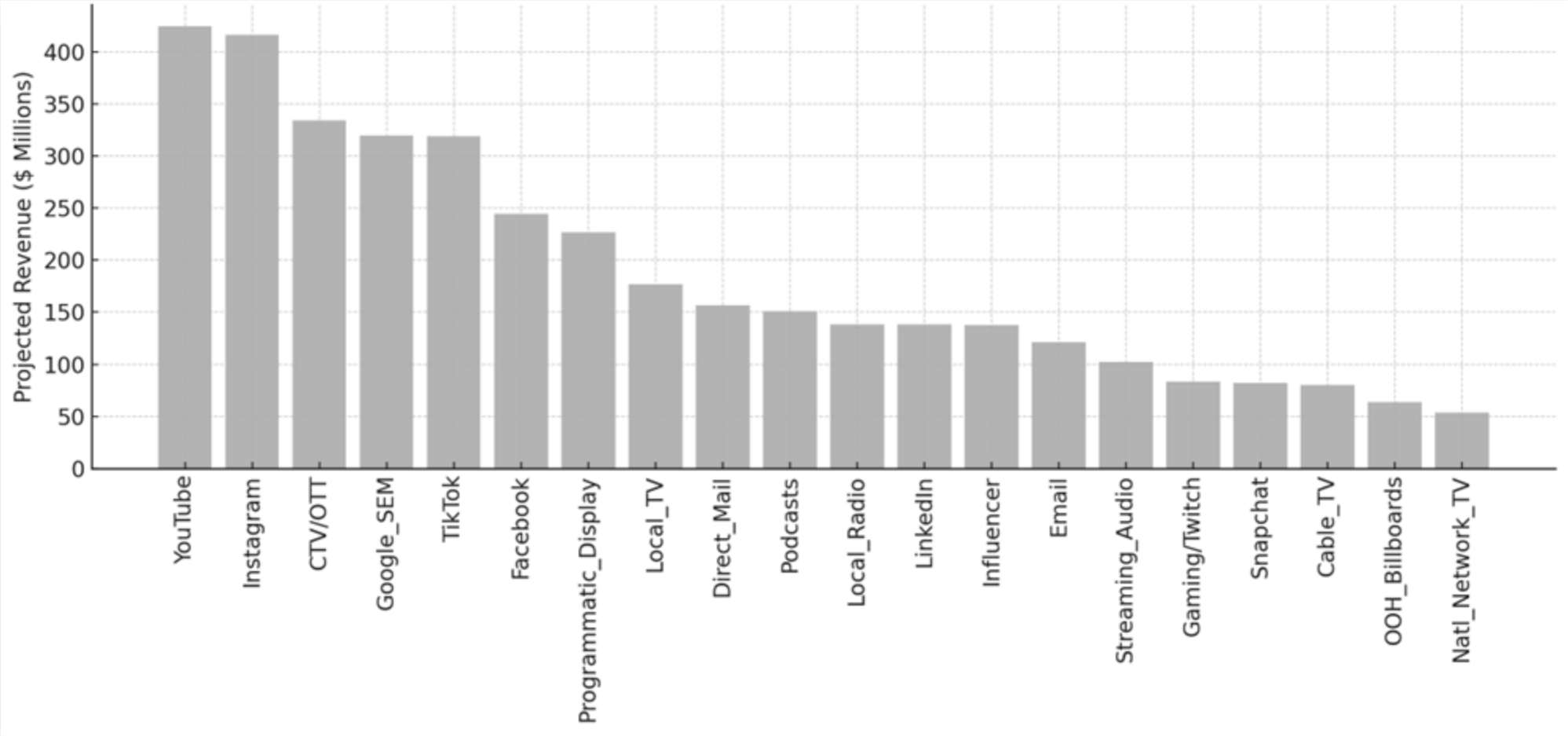
Futuri conducted 50-hours of data analysis across 8 major LLMs to understand how these tools influence buying decisions

- 2,552 unique prompt scenarios
- 60 business categories (retail, political, finance, health, etc.)
- 3 geographic levels: Local, Regional, National
- Budget ranges: \$25K-\$10M
- Tested across 8 major LLMs
- That means we asked 8 LLMs to create **20,416 different MMMs** to understand the implications to radio and TV advertising spend.



1. GPT-4o
2. GPT-01
3. Claude 3.7
4. Gemini Pro 1.5
5. Gemini Flash 1.5
6. Perplexity
7. Grok v1
8. Grok v2

If all the campaigns ran as AI recommended, this would be the limited share broadcasters would receive



Results if all 20,416 plans were to be executed = broadcast loses



- **TV Split Paradox:** Broadcast TV earns ~7% avg. vs. CTV/OTT ~18%
- **Audio Cannibalization:** Podcasts + Streaming audio collectively pull 12% share; 70% of plans with either podcasts or streaming drop radio entirely
- **Print/Out of Home Survive:** Direct mail (4%) and billboards (3%)
- **Programmatic Over-index:** Display/retargeting shows in 92% of plans at 11% avg. spend - second only to YouTube for raw dollars
- **Budget Elasticity** – As spend rises from \$50K-\$1M, channel count grows from 6 to 11
- **Objective Skew** – Awareness briefs shift 5 points toward video; lead gen and retention briefs double SEM/social at video's expense - radio steady either way
- **Model Variability** – Standard deviation of channel spend across LLMs = 4.3 pts; switching engines can swing any channel's allocation +/- 12 pts (biggest on CTV, display)


Political spend: Broadcast loses big in 2025



1. AI vs. Historical Share of Political Ad Spend

Purpose: Shows how AI driven media planning allocates far less to broadcast than historical norms.

Channel	AI LLM Share (%) 2025	2000 Historical Share (%)
Radio	3	7
Broadcast TV	7	75
YouTube	17	0
CTV/OTT	14	0
Programmatic Disp.	8	0
Podcasts	4	0
Facebook/Insta	7	0

 **Insight:** AI-generated plans massively downplay legacy media's proven value, shifting dollars to digital-first formats.


Follow the \$ - AI political budget allocation



2. AI Political Budget Allocation by Distribution Channel

Purpose: Shows what channels LLMs recommend most for political advertising.

Channel	Net Share of Budget (%) 2025
YouTube	17
CTV/OTT	14
Programmatic Display	8
Facebook/Insta	7
Podcasts	4
Streaming Audio	3
All Radio (Local +)	3

 **Insight:** Radio is tied for last—behind podcasts, programmatic, and streaming audio—despite its strong historical performance.

The alarming results



Radio and TV's massive AI underrepresentation



Evaluated **20,000+**
AI-generated MMM plans
across 8 leading LLMs.



Most LLMs favored
YouTube, OTT,
programmatic, and social.



Broadcast TV gets ~ 7% vs.
CTV/OTT 18%.



Radio earns only 3% of
the total political
spend.



AI models ignore
reach/relevance; favoring
digital video and programmatic.



If it's not in the data, it won't
be in the budget - radio and
TV risk systemic exclusion.



Claude and Gemini
excluded radio in 100%
of plans.

The broadcast industry needs to take action or be excluded



Political AI spending is already happening.

Agencies are piloting AI-only campaign planning tools for down-ballot 2026 races. The shift is happening now, not next cycle.



Without radio and TV data, there is no budget.

AI doesn't recommend what it hasn't learned to value. If we don't feed the systems structured proof, we lose by default.



We have a two-year window to rewrite the algorithm

This is an urgent moment for broadcast executives and the TV and radio industry to lead by injecting success metrics, campaign results, and audience insights directly into the AI ecosystem.



The algorithmic snowball effect



Radio and TV's systemic exclusion unless we intervene

01

AI tools
recommend less
TV and radio

02

Buyers shift spend
accordingly and
young buyers know
less and less about
broadcast

03

Bottom Line:
Future AI models
downrank radio and
TV even more

Potential Solutions



- Highly intentional stealth PR, LLM friendly articles, FAQs, schema-tagged pages with clean metrics, clear audiences
- Pieces placed on high-authority domains + trade press (not TV/Radio trades... business/advertising trades) for LLM ingestion
- Exposing impression to outcome data via consumer data pipelines
- Feeding streams to MMM vendors like Meridian, Neustar, Analytic Partners
- Issuing quarterly white papers for major categories (we can discuss most appropriate content.)
- Use Futuri's TopLine beyond direct sales to fuel social content for your entire sales team
- Work with Futuri's TopLine to create quantitative profiles of your audience, positioning for each brand, and for your unique audience segments

We would be happy to connect with your team to discuss further.

Contact:
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