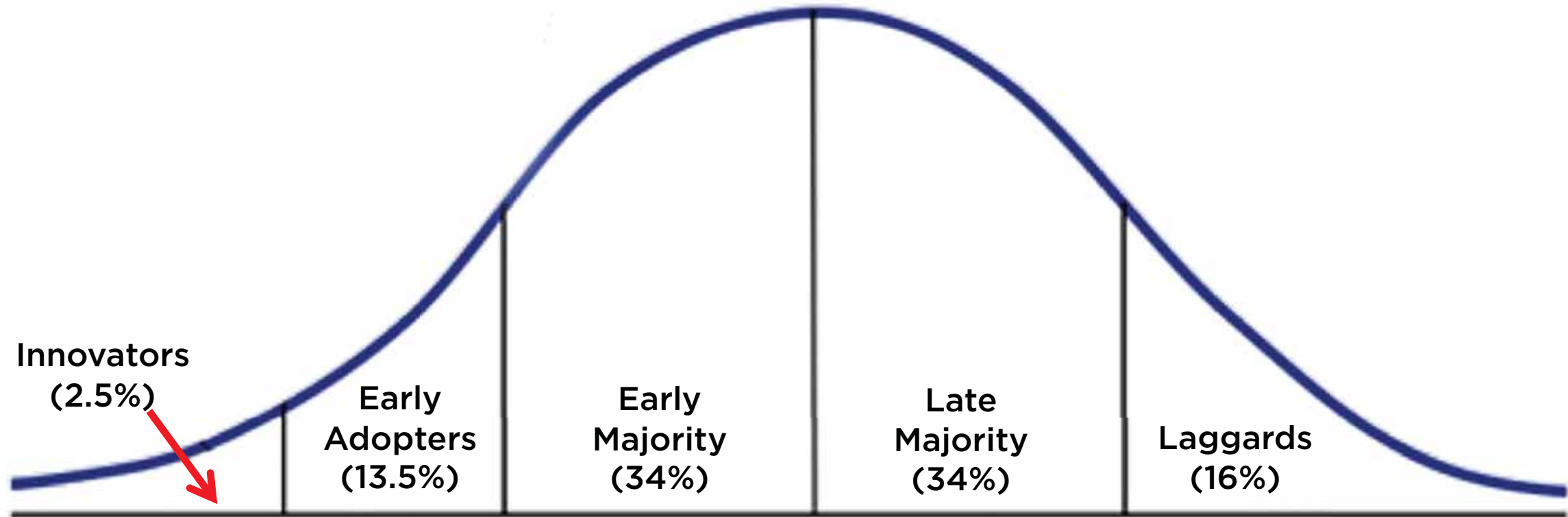


# What Now What Next?

Embrace Disruption, Embrace New Ideas,  
6 Things that Make Local Media Great



# The law of diffusion of innovation



Let's take a  
quiz ...



Will give me a ride



Will ship a new mattress to my home



A place to watch movies



I can listen to the music I like



Will deliver meals and help me cook



Order on-line and will deliver anything to my door



Shows me who is at my front door

A Ride ...



Will deliver a mattress ...

# purple®



## Casper



Watch movies ...

# NETFLIX

Listen to music ...



pandora



Meals ...



Deliver to my door...



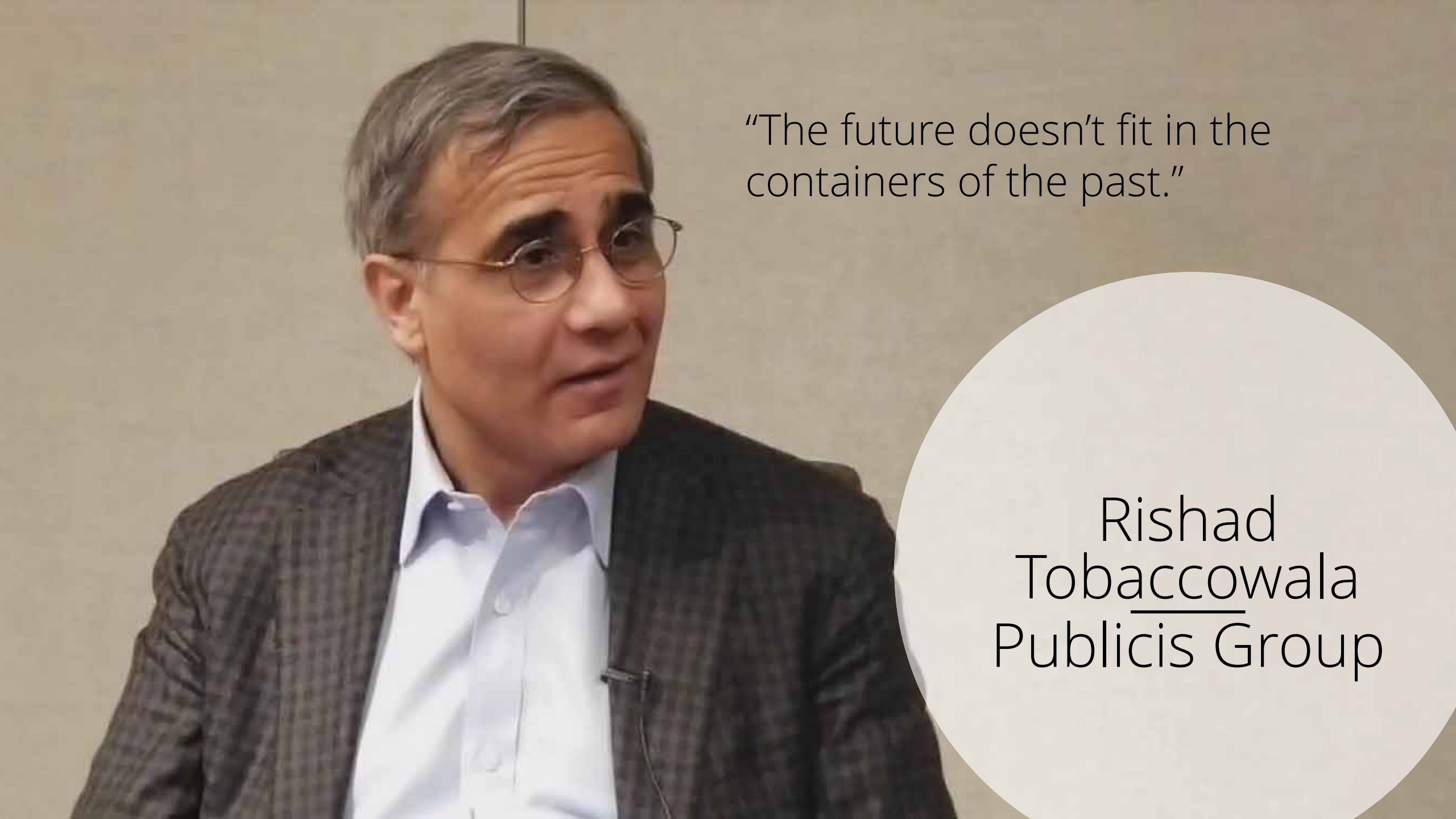
Answers my door ...

ring

These companies have one thing in common

# Disruption

# Embrace Disruption

A man with short, graying hair and glasses is shown from the chest up. He is wearing a dark, patterned blazer over a light blue button-down shirt. He is looking slightly to his right with a thoughtful expression. The background is a plain, light-colored wall.

"The future doesn't fit in the  
containers of the past."

Rishad  
Tobaccowala  
Publicis Group



# Three Universal Truths



# Digital Doesn't Care

Disruption is driven by  
consumer choice

Consumer choice is  
driven by content



Felix Kjellberg  
– Net worth \$40  
Channel: [PewDiePie](#)  
Subscribers: **110 million**  
Shtick: Video games / jokes



Ryan Kaji (He's 7 Years old)  
– Income \$29.2 Million  
Channel: [Ryan ToysReview](#)  
Subscribers: **30 million**  
Shtick: Reviews toys



Mr. Beast (Jimmy Donaldson)  
– Income \$54 Million  
Channel: [Mr. Beast](#)  
Subscribers: **94 million**  
Shtick: Daring stunts for cash



Michelle Phan  
– Net worth \$50 Million  
Channel: [Michelle Phan](#)  
Subscribers: **9 million**  
Shtick: Makeup tutorials

Source: CelebrityNetworth.com 2019



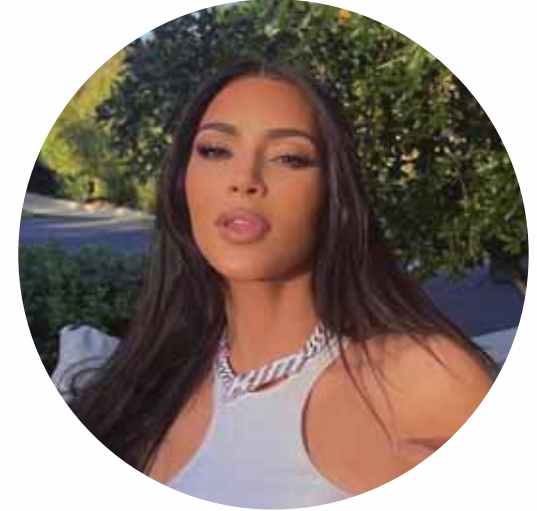
Selena Gomez  
Followers : 311 million



Cristiano Ronaldo  
Followers : 428 million



Kylie Jenner  
Followers: 327 million



Kim Kardashian  
Followers: 300 million

Source: brandwatch.com





By comparison



Jeff Schmidt  
Followers : 400



 THE INFINITE DIAL 2022

# The Infinite Dial 2022

#InfiniteDial



WONDERY



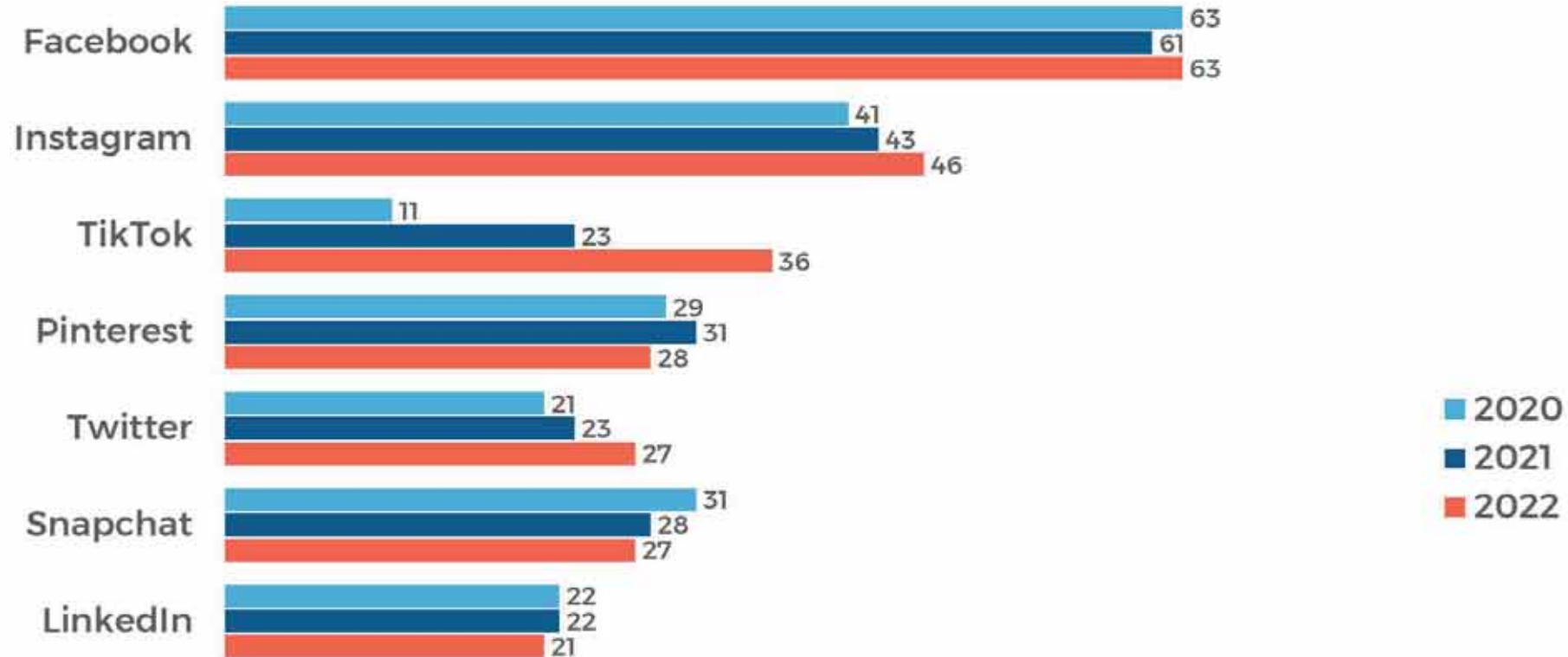
THE INFINITE DIAL © 2022 EDISON RESEARCH

#InfiniteDial

# Social Media Brand Usage

TOTAL U.S. POPULATION 12+

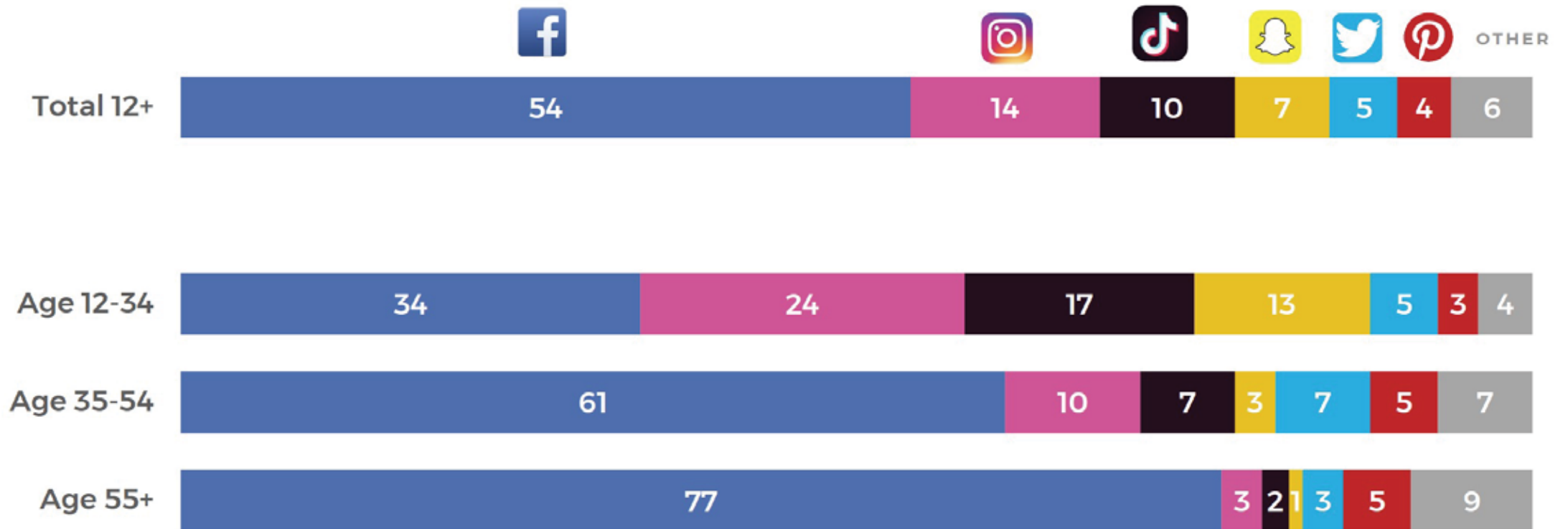
% USING SOCIAL MEDIA BRAND





# Social Media Brand Used Most Often

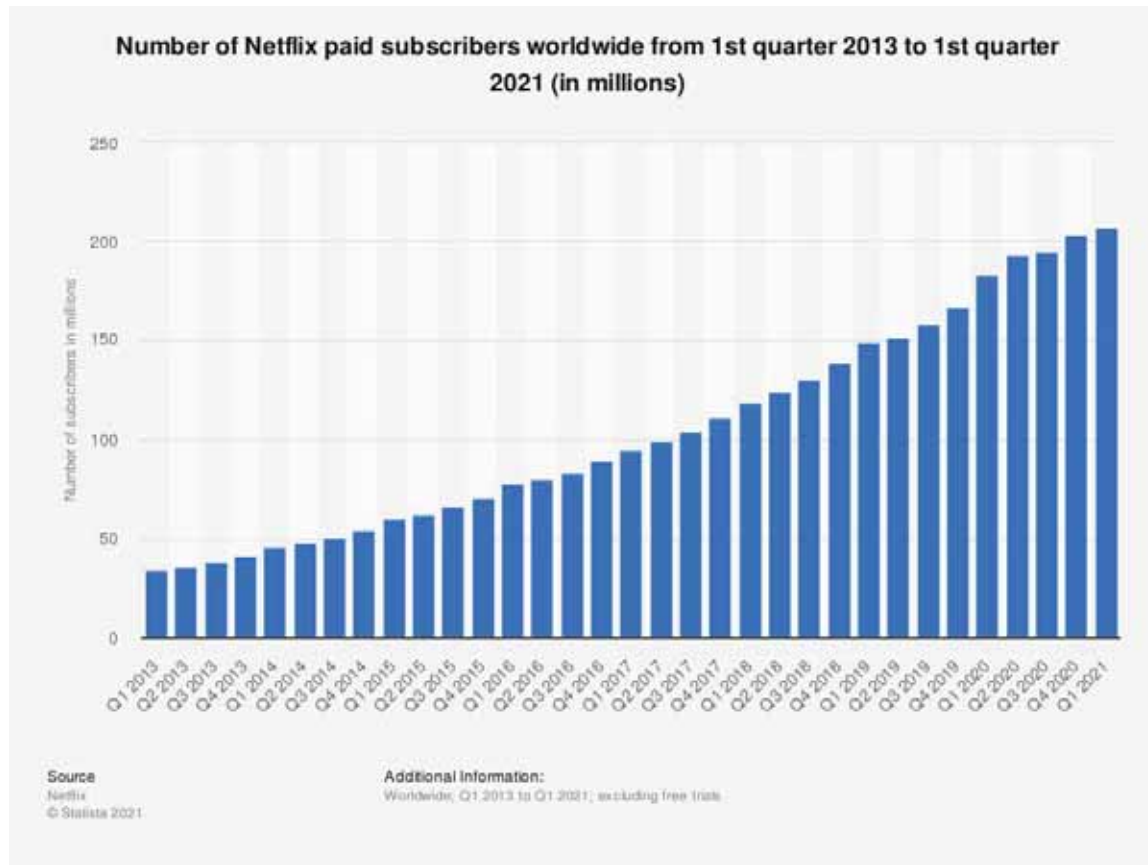
BASE: U.S. SOCIAL MEDIA USERS



# Netflix

## 74.4 million US monthly average users(End of Q1 2021)

Source: Statista



Digital democratizes  
development, production and  
delivery, reinvents supply chains  
and challenges established  
brands by giving consumers new  
ways to engage with the content  
and brands they love

# Content is Everything

What Makes Us Great?

# 1.) Local Content



# People tune into radio during a crisis.

Daily Trends



Source: NuVoodoo, n=10,261 Persons 16-54; data collected between 6/27-7/3/2020;  
use radio for information on coronavirus cases in immediate area

# Radio - A trusted resource

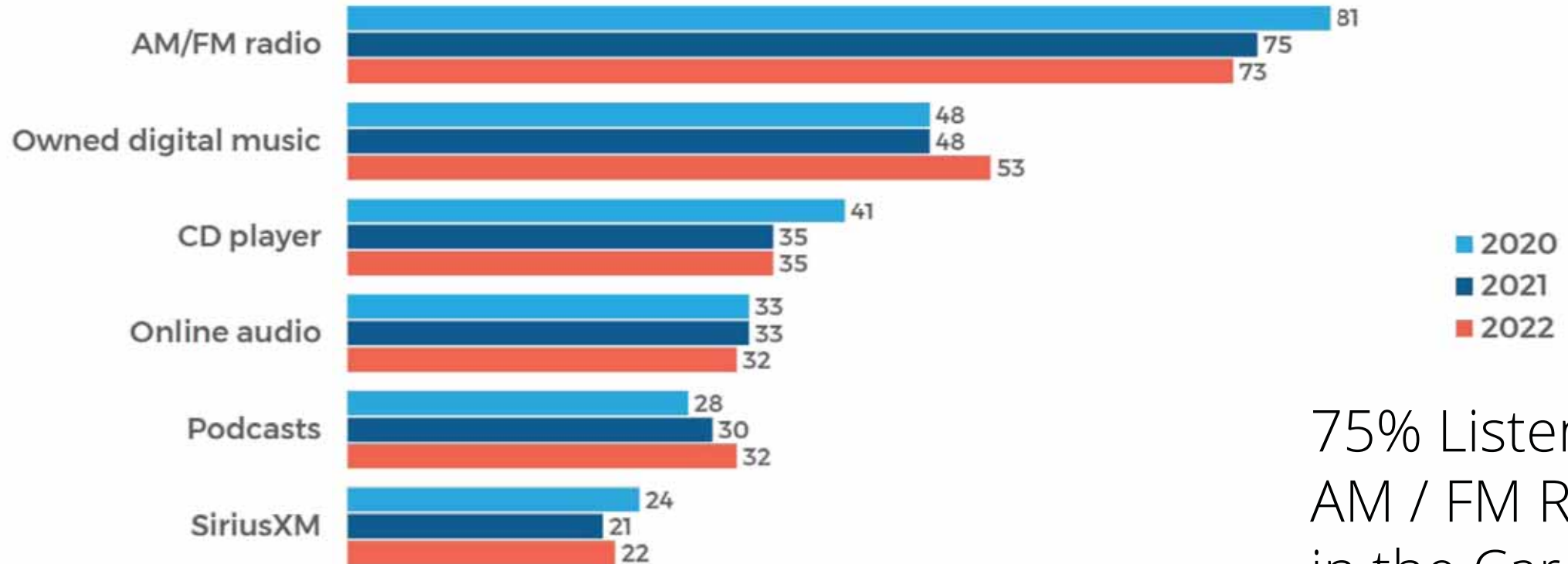


Source: Nielsen, custom online survey, March 20-22, A18+, n=1000

# Audio Sources Currently Ever Used in Car

BASE: U.S. AGE 18+ AND HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 84%

% USING AUDIO SOURCE IN CAR



75% Listen the AM / FM Radio in the Car



# IoT

# IoT is Everywhere

- Devices connected to and learning from other devices
- Smart lights, locks, thermostats, security systems and appliances
- Potentially new channels where broadcasters connect with listeners / viewers
- New 5G networks will allow BILLIONS more connected devices with significantly faster speeds and less latency
- In 2008 it was reported that there are more devices connected to the internet than there are people on the planet



# Smart Appliances

- Fully enabled Internet appliance
- Shopping lists
- Notifications
- View contents on your phone
- Someday soon, you might be reaching customers through an appliance!

# Smart Speakers The 4<sup>th</sup> Sales Channel



# Smart Speakers

- Smart Speakers / Smart Audio
- 35% of Americans 18+ (100 million) now own a smart audio device.
- 23% Alexa, 11% Google Home
- Other digital assistants include Samsung Bixby and Apple Home w/Siri

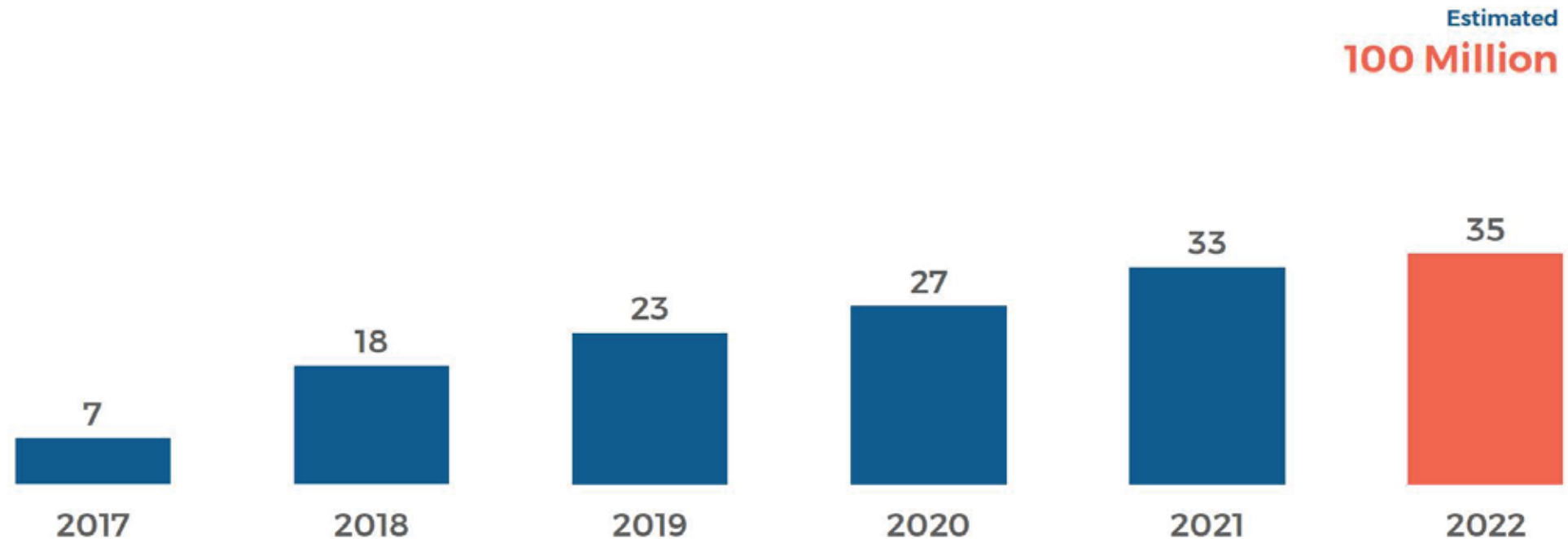


Source: Infinite Dial 2021

# Smart Speaker Ownership

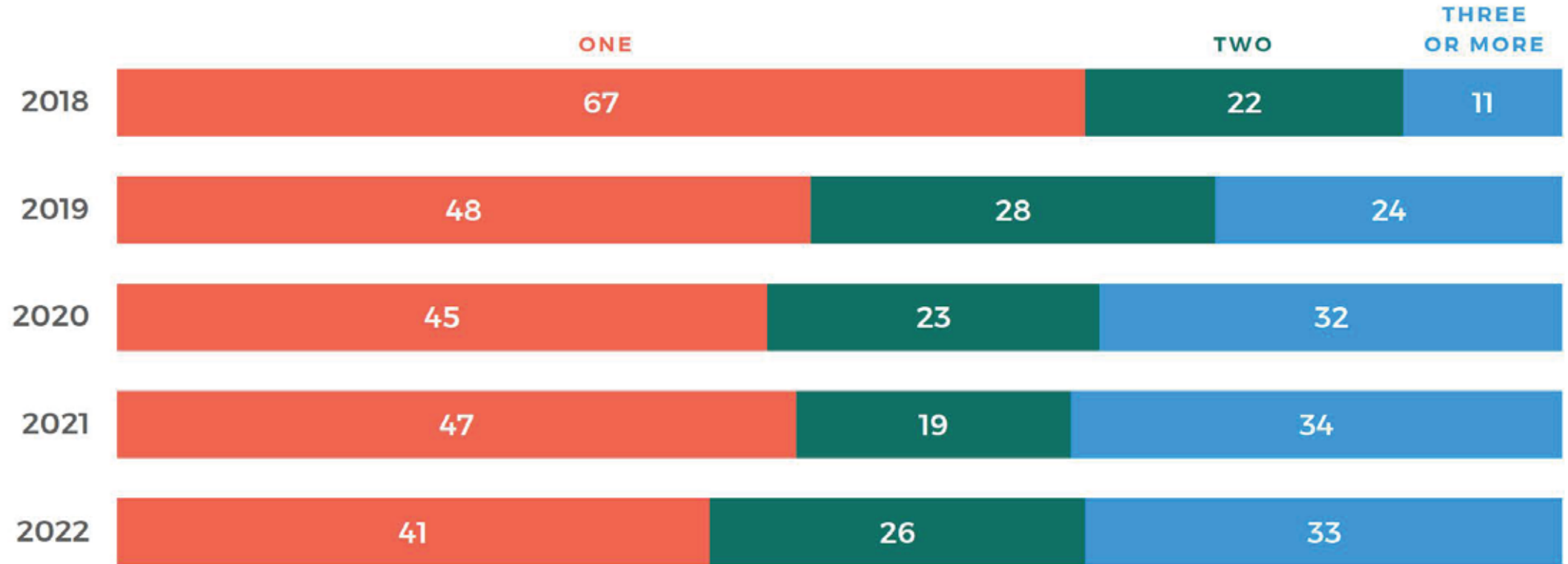
TOTAL U.S. POPULATION 12+

% OWNING A SMART SPEAKER



# Number of Smart Speakers in Household

BASE: U.S. AGE 12+ SMART SPEAKER OWNERS

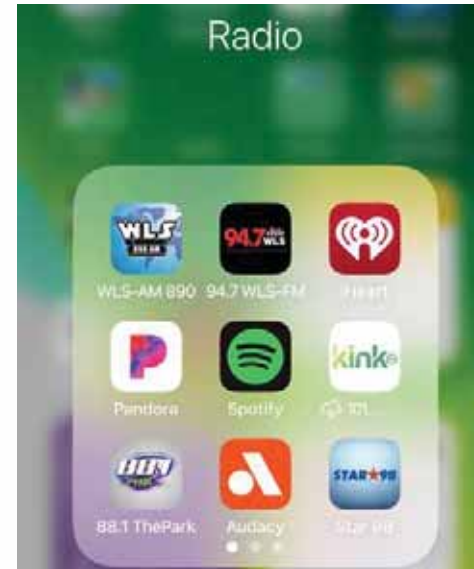




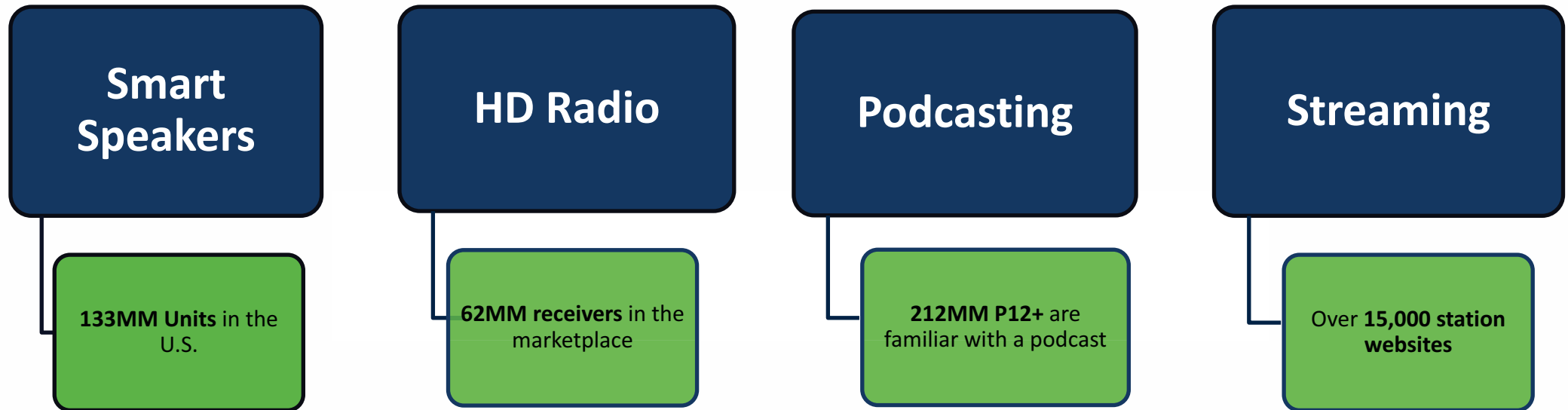
What Makes Us Great?

## 2.) Technology

# Radio has become a “Tech Geek”



# RADIO'S DIGITAL PLATFORMS ARE STEADILY GROWING



Source: Voicebot Smart Speaker Consumer Adoption Report, 2019; HD Radio stat from Xperi/HD Radio, 2019; The Infinite Dial 2020 – Edison Research / Triton Digital; PrecisionTrak.com, 2019, commercial and non-commercial stations

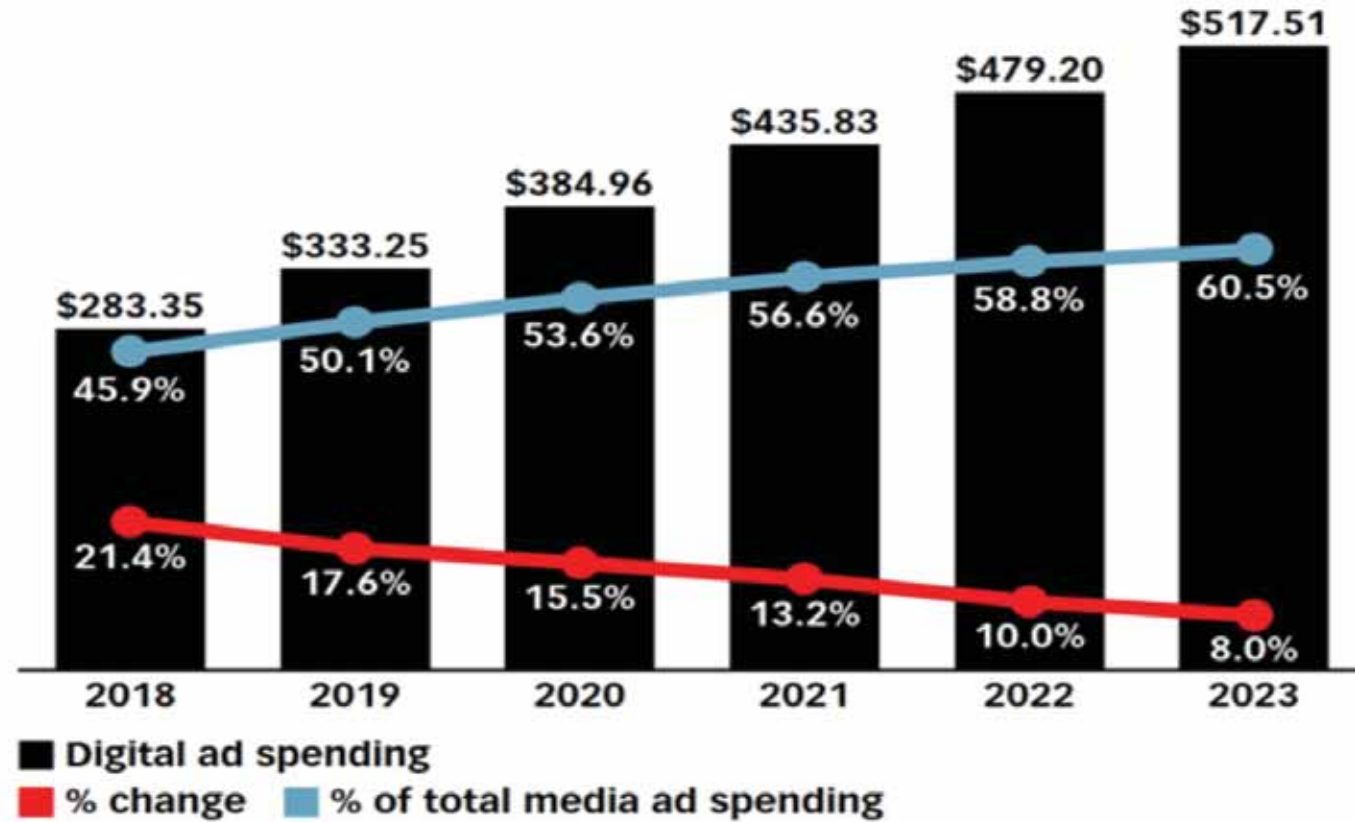
What Makes Us Great?

## 3.) Local Activation

SHOW ME THE MONEY!

## Digital Ad Spending Worldwide, 2018-2023

billions, % change and % of total media ad spending



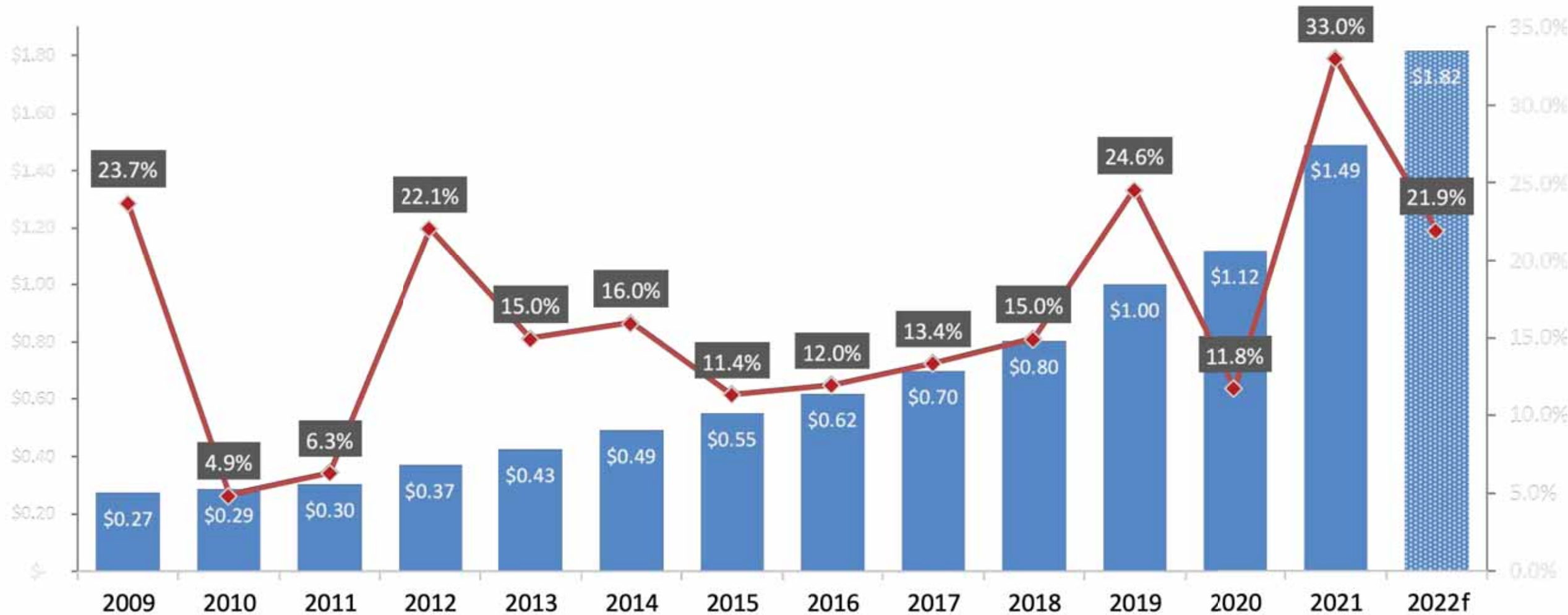
*Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets and other internet-connected devices, and includes all the various formats of advertising on those platforms; excludes SMS, MMS and P2P messaging-based advertising*

*Source: eMarketer, February 2019*



# Radio's Digital Ad Revenue and YOY Growth, 2015-2022

*\$ in Billions*



Source: Borrell Associates Inc.

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**RAB** RADIO  
ADVERTISING  
BUREAU

## Per-Cluster Share of Obtainable Digital Revenue, by Market Size, 2021

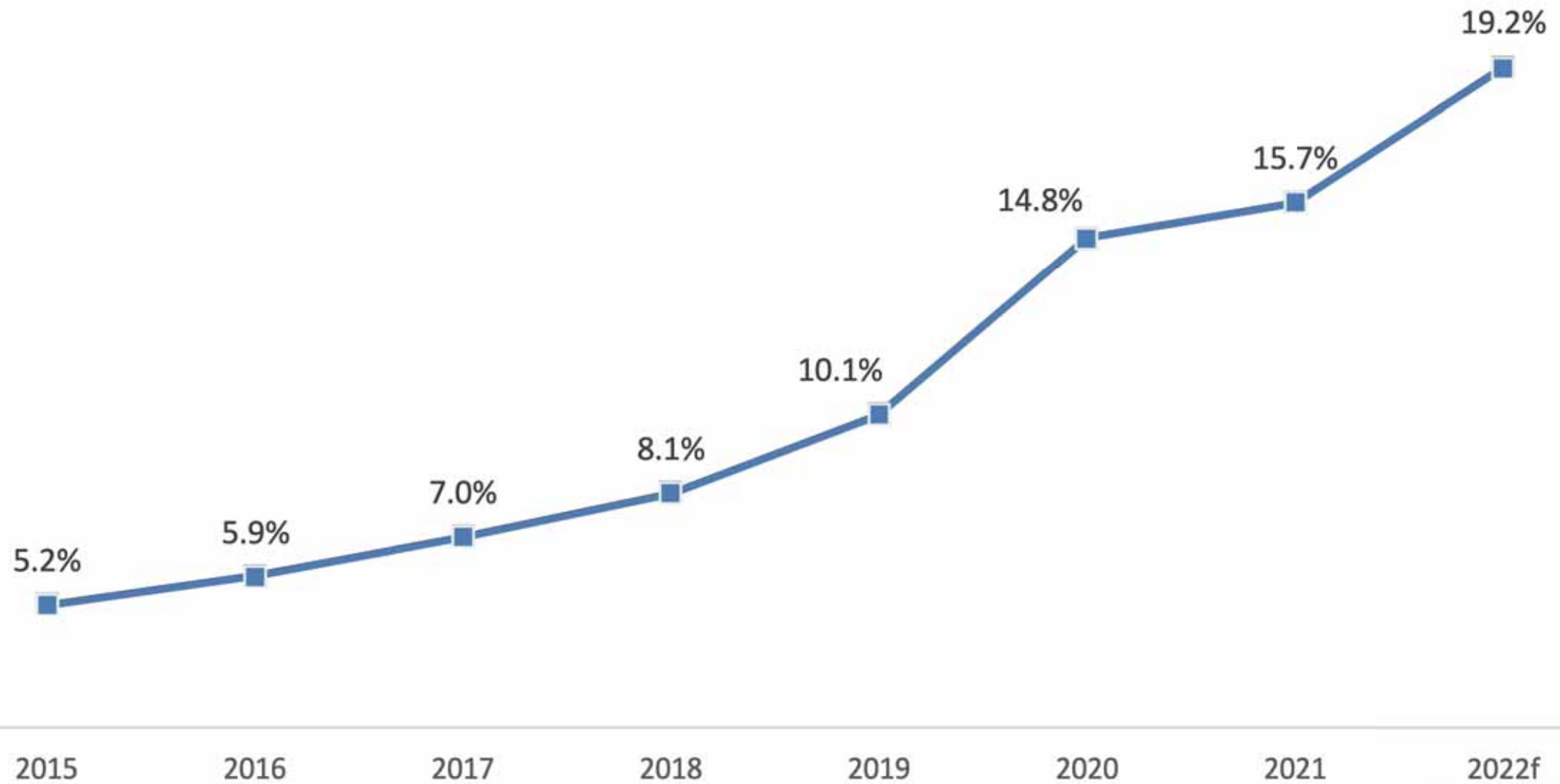
DMR Size	Sample Size		Share of In-Market Obtainable Digital Revenue			
	Stations	Clusters	Avg.	Median	Highest	Best Practice*
1 to 10	359	88	1.3%	0.7%	7.1%	5.7%
11 to 20	286	65	2.4%	1.0%	13.1%	11.5%
21 to 50	492	118	2.4%	1.2%	13.2%	11.0%
51 to 100	745	163	3.8%	2.1%	17.3%	14.5%
101 to 200	967	198	5.7%	3.4%	36.7%	33.2%
201 to 300	461	93	9.6%	6.3%	47.4%	38.2%
301 to 513	269	65	8.5%	4.8%	42.1%	34.8%

\*Average market share for the five market clusters getting the largest shares

Source: Borrell's Digital Revenue Database

© 2022 Borrell

## Percentage of Radio's Total Ad Revenue From Digital Sales



Source: Borrell Associates Inc.

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RADIO  
ADVERTISING  
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## What Radio Advertisers Bought in 2021, & What They Spent On It

	Media	% Buying	Avg. Annual Spending
	<b>Radio</b>	<b>100%</b>	<b>\$ 23,684</b>
	Any/All Types of Digital Media	88%	\$ 61,070
	Social Media	69%	\$ 15,871
	Events/Sponsorships	54%	\$ 21,276
	Paid Search	51%	\$ 52,811
	Online Banner/Display Ads	48%	\$ 15,365
	Newspapers	48%	\$ 18,386
	Direct Mail	42%	\$ 18,741
	Magazines	36%	\$ 8,132
	Other Printed Publications	35%	\$ 4,048
	Out-of-Home	34%	\$ 38,197
	Broadcast TV	24%	\$ 55,796
	Streaming Video/OTT	23%	\$ 19,666
	Online Directory Listings	22%	\$ 3,932
	Cable TV	21%	\$ 35,741
	Printed Directories	18%	\$ 8,938
	Email Sponsorships	17%	\$ 5,601
	Mobile In-App Ads	17%	\$ 4,853
	Content Marketing	17%	\$ 5,224
	Streaming Audio/Podcasting	14%	\$ 10,087
	Mobile SMS/Text	14%	\$ 4,672

Source: Borrell's Local Advertiser Survey, Aug-Oct. 2020; N = 944 radio buyers

© 2021 Borrell

On average, 15% of everything that's spent on digital advertising by businesses located inside a market goes to a locally based media company.

The remaining 84% goes to Google, Facebook, Yelp, Homes.com, Autotrader.com, and a bevy of other Internet companies.

# What's Changing

*In the past 4 years advertisers have . . .*

- ✓ Increased what they buy: **5.5** types of media to **8**
- ✓ Decreased # of companies they buy from: **5** to **2**



Local media can  
provide ...

- Reach
- Target
- Engage



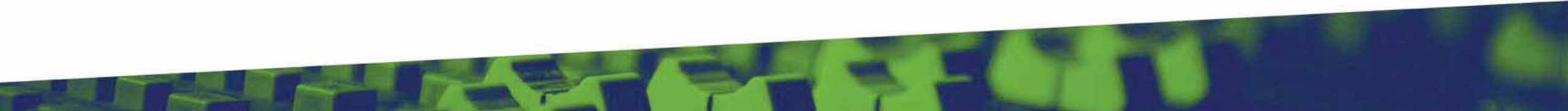
It's not  
Us vs. Them







Digital is not a competitive  
medium, it's a complimentary  
medium





What Makes Us Great?

4.) Fully integrated marketing options that cross channels and platforms

# Digital Revenue for Local Media

- 
- Banners
  - Streaming commercials
  - Pre-roles (Audio and Video)
  - On-Line Promotions
  - Program sponsorships
  - Mobile Apps
  - Social media
  - Website Development
  - Podcasts
  - SEM / SEO
  - Email
  - Contests
  - Video
  - Auctions
  - Paid search / AdWords
  - Directories
  - Targeted Display
  - GEO Fencing

# Local Media Can Deliver More

- **WE CAN NOW OFFER CROSS PLATFORM SUPREMACY:**
- Delivering 13 Different Media Channels



What Makes Us Great?

## 5.) Creativity and local engagement



# Leverage Native Content to Achieve Client Goals

News Traffic Weather

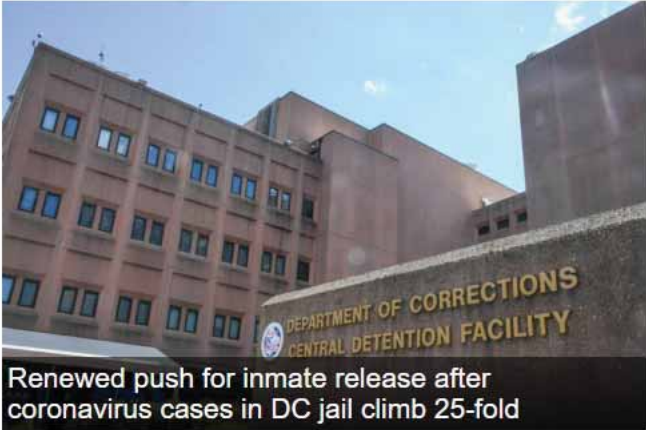
Listen

D.C. Metro 60°


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Local News




Renewed push for inmate release after coronavirus cases in DC jail climb 25-fold



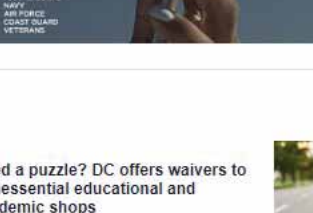
Travel in the 'new normal': When coronavirus restrictions loosen, what will travel be like?




College Board launches fix after glitch kept students from submitting AP exams



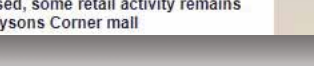
Man arrested after car chase, barricade in DC home



Pr. George's lawmakers critical of Larry Hogan's response to county's coronavirus crisis



Hiker finds body in wooded area near Fairfax Station



Coronavirus costs may put Bowie's new ice arena on thin ice



COVID-19 hospitalizations at 3-week low in Md.



DC man burned by May 13 fire dies, triggering homicide investigation



Charles Co. Sheriff's Office is keeping an eye on some commissioners' homes



SSA board urges moving death records to Treasury to stem coronavirus payments to deceased

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Weekly 'Eavesdrop on Club Quarantine Jam Session' brings joy to a Capitol Hill neighborhood




Collaboration without compromise: A security-first approach to telework



Arlington National Cemetery limits Memorial Day weekend visitors to family pass holders



PHOTOS: While most stores are closed, some retail activity remains at Tysons Corner mall



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Stay safe, shop smart and eat healthy during the COVID-19 pandemic

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Find yours.

FEDERAL NEWS NETWORK

Are you working securely in the Cloud?

GET SECURE NOW

INSIGHT BY CISCO

Collaboration without compromise: A security-first approach to telework

April 24, 2020 5:00 pm 3 min read

This content is provided by Cisco

As government agencies transition to remote working, leaders at every level are taking a closer look at the tools they must rely upon to do so. As this spring mounts, so does the realization that both security and privacy are fundamental needs for government organizations.

As part of Cisco, one of the world's leading enterprise security providers, Webex® is trusted by 95% of the Fortune 500 and over 2000 government agencies. And as a FedRAMP® Authorized solution, Webex provides government a robust, industry-leading, cloud-based real-time video meeting solution that adheres to stringent federal security requirements. In doing so, it reflects our guiding principle – Collaboration without Compromise.

With this in mind, we're committed to helping government agencies like yours address remote workplace productivity, connectivity, privacy and security in three distinct ways.

Workspaces: We define workspaces as our offices, trucks, and our clients' homes. Our

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Check out our Job Site Precautions video

Sun Design has been engaged in preparations for preventing and minimizing the spread of the Coronavirus. We take the risks associated with this virus very seriously. Our primary concern is the health and well-being of our team members, our trade partners, our families, and our customers. We want you to be aware that Sun Design is doing all we can to prevent the spread of the Coronavirus while we go about our daily responsibilities to manage the needs of our employees, trade partners and customers. Here is a summary of our efforts to date.

Workspaces: We define workspaces as our offices, trucks, and our clients' homes. Our

SUN DESIGN

Washington, DC





## WTOP News with Sun Design Remodeling.

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Sun Design is committed to preventing the spread of the Coronavirus while continuing to manage their daily responsibilities ...[See More](#)



*Coronavirus  
Precautions*

*Sun Design Remodeling*

WTOP.COM

**What does a remodeling job site look like during COVID-19 | WTOP**

👍 🗨️ ❤️ Carrie Wh... 13 Comments 4 Shares



Like



Comment



Share



## WTOP News with MedStar Washington Hospital Center.

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During these uncertain times, it's important to eat healthy and create well-balanced meals for you and your families.



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**Stay safe, shop smart and eat healthy during the COVID-19 pandemic | WTOP**

👍 ❤️ 🗨️ 126

9 Comments 32 Shares

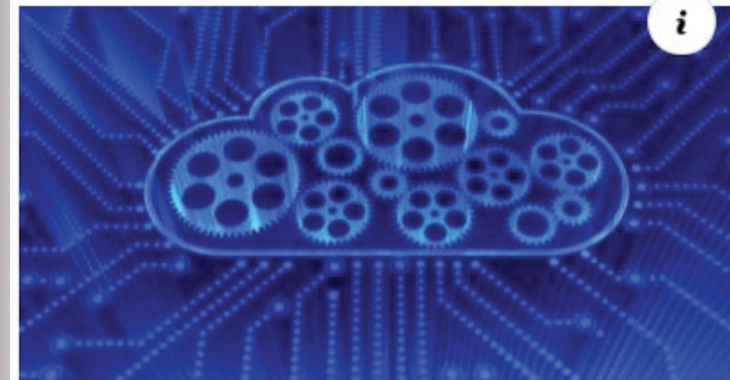


## Federal News Network with Cisco.

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As government agencies transition to remote working, they must leverage existing partnerships with their trusted ...[See More](#)



FEDERALNEWSNETWORK.COM

**Collaboration without compromise: A security-first approach to telework | Feder...**



Rashad BurberryBeanz Welch and 16 oth...

# 4 KEY WAYS TO EARN NEW DIGITAL REVENUE

1. Sell existing digital assets
  - Digitalize a product or service
2. Contract assets based on shared-risk outcome
3. Move into adjacent or new digital streams
4. Choose one or two at a time and get good at development, delivery and follow up / analytics

# The Big 5 for Local Media

- Audio stream and pre-roll
- Banner Ads (Own website)
- Targeted Display (Other websites)
- Email Marketing
- Website Development

# 4 TIPS TO BUILDING AN EFFECTIVE MEDIA STRATEGY

1. Get Granular
2. Align with their lives
3. Get creative
4. Be authentic

BONUS TIP: Stop thinking of silo's and platforms and start thinking of audience. You sell access to a unique and fiercely loyal audience.

# What Makes Us Great?

6. Powerful local  
media brands



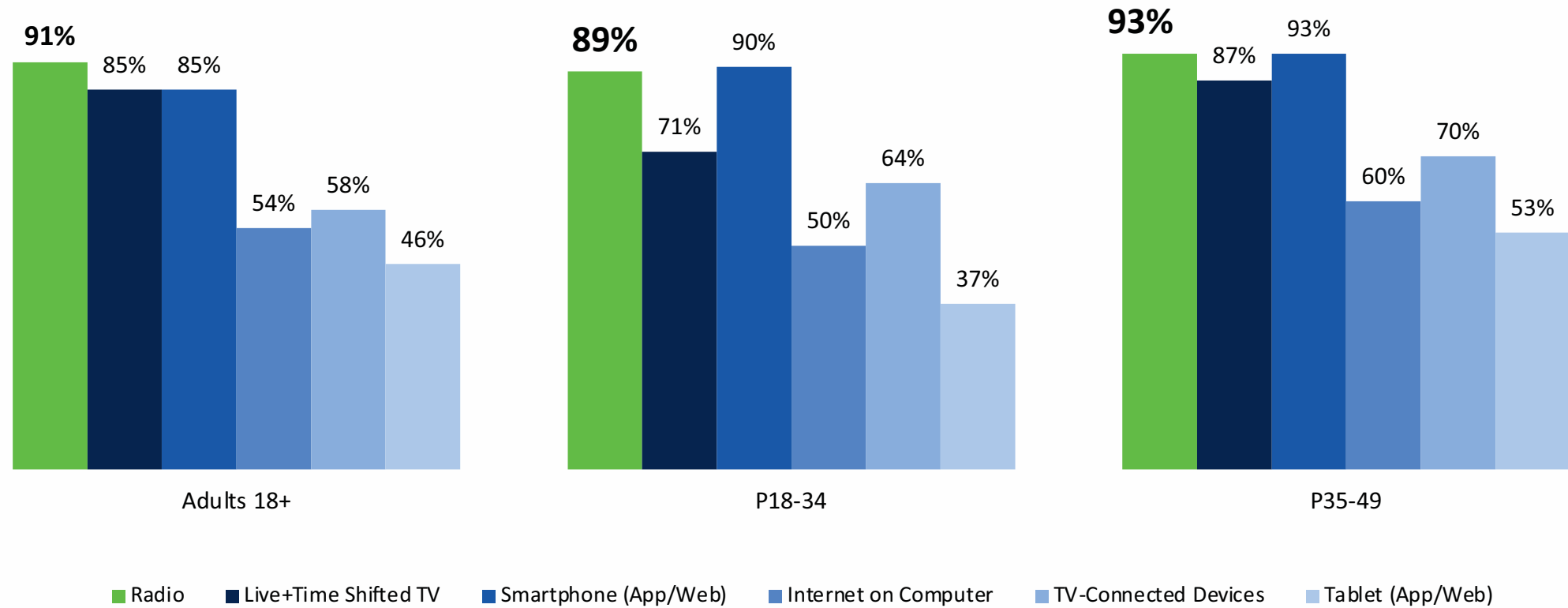


# **BOLDLY TELL OUR STORY**

**THERE'S NEVER BEEN A BETTER TIME**



# RADIO BOASTS HIGHEST MASS REACH AMONG TRADITIONAL MEDIA



Source: The Nielsen Total Audience Report August 2020

# THE MEDIA UNIVERSE

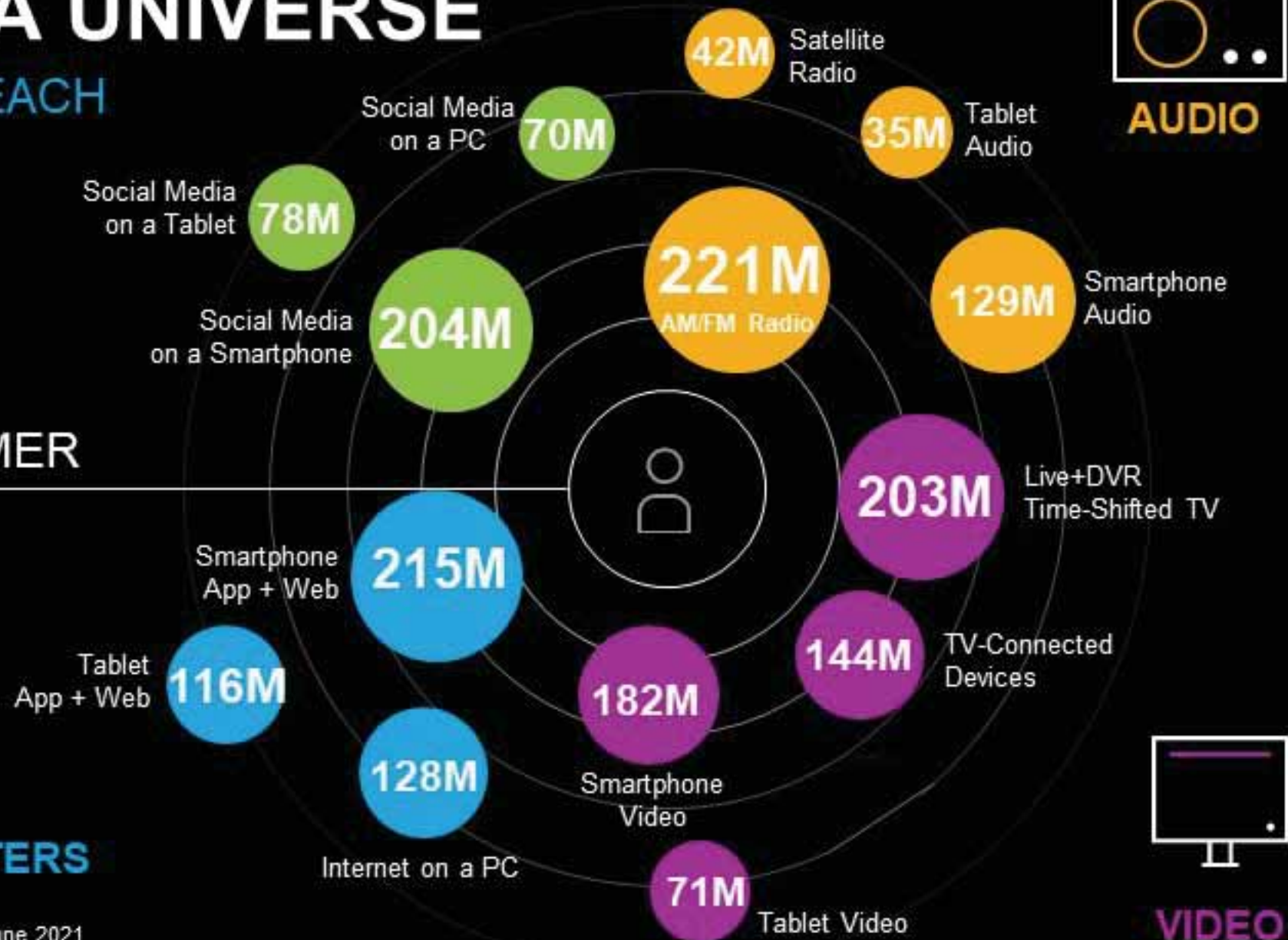
P18+ WEEKLY REACH

 **SOCIAL MEDIA**

THE CONSUMER



**MOBILE & COMPUTERS**



Source: Nielsen Total Audience Report June 2021

Satellite Radio data comes from Nielsen Scarborough USA+ Release 2 2020

## Online



Digital capabilities offering interactive opportunities

Complements and enhances on air campaign by reaching consumers using many touch points

Delivers content wherever and whenever listeners want it

## On Air



A mass medium capable of easily delivering your message to many people

Targetable assuring the right people are exposed to your message

A trusted medium and always available especially during times of crisis

## On Target



An environment delivers consumers who are engaged and passionate about the content

Offering companionship and information

Exposure to the message when and where consumers are ready to buy or shop

# Your Challenge...

- Determine what services/products and why?
- How? 3<sup>rd</sup> party or internal execution.
- Setting NEW norms and expectations from the top down.
- Compensation structure that WORKS
- All sellers v dedicated digital sellers?
- Standards... Required or optional?
- Roll-out strategy & on going training.
- Internal support & fulfillment





# CDMC Course Outline

CDMC  
CERTIFIED DIGITAL MARKETING CONSULTANT

The Certified Digital Marketing Consultant (CDMC) 2020 online training is brand new and has been created specifically for the radio industry.

This course will give your sellers the knowledge needed to feel confident when discussing digital media with any client. This comprehensive program is divided into nine main sections and each section has multiple short video modules to provide sellers with immediate, actionable information as they transform from radio sellers to multi-platform, multi-channel marketing experts whose clients and prospects depend on.

## CLASS 1 Digital Advertising Eco-System

In the ever-changing media landscape, participants will learn the evolution of the digital advertising eco-system and where we are today. The differences between traditional and digital media are outlined, as well as the role programmatic may play for today's media seller.

**Module 1:** Welcome  
**Module 2:** Traditional Marketing Models  
**Module 3:** Digital Marketing Models  
**Module 4:** Benefits of Traditional and Digital  
**Module 5:** Functions within the Eco-System  
**Module 6:** Fundamentals of Programmatic

## CLASS 2 Fundamentals of Digital in the Radio Industry

This class focuses on the impact digital has in the radio industry and reviews specific growing digital products such as streaming, social media, mobile apps, and newsletters. These various digital touchpoints have extended radio stations' reach and enhanced their ability to engage with listeners.

**Module 1:** Digital Extension for AM/FM Radio Stations  
**Module 2:** Radio is Everywhere  
**Module 3:** Station Social Media  
**Module 4:** Station Newsletters  
**Module 5:** Station Apps

## CLASS 3 Digital Ad Formats

You will learn about the core digital marketing solutions being offered in many markets today. While each station may vary in the digital offerings it has, the importance of understanding each of these products remains. These modules allow sellers to confidently have conversations with clients and prospects about today's digital marketing solutions.

**Module 1:** Introduction to Digital Solutions  
**Module 2:** SEO/SEM  
**Module 3:** Email Marketing  
**Module 4:** Display Advertising and Targeting  
**Module 5:** Behavioral and Contextual Targeting  
**Module 6:** Website and App Targeting  
**Module 7:** Geofencing & Geofence Conversion  
**Module 8:** Retargeting and Audience Extension

## CLASS 4 Digital Creative

Creative continues to change in digital media at a rapid pace. Responsive websites and cross-platform marketing allow brands to holistically engage with consumers. Participants will gain insights into the most recent creative advancements, including video ads and the now standardized ad sizes for them all.

**Module 1:** Introduction to Digital Creative  
**Module 2:** Cross-Platform  
**Module 3:** Responsive Design on Desktop/Mobile  
**Module 4:** Automated, Rich-Media and Dynamic Ads  
**Module 5:** Video Ads  
**Module 6:** In Banner vs In-Stream Video Ads  
**Module 7:** Industry Standard Ad Units

## CLASS 5 Digital Media Platforms

Many have referred to radio as the original social medium, so it is vital for sellers to understand the top social media networks, and how to develop campaigns for their clients based on client-specific needs. Similarly, native advertising is explained and compared to live read endorsements.

**Module 1:** Creating a Social Media Strategy  
**Module 2:** Social Media  
**Module 3:** Native Advertising

## CLASS 6 Digital Media Measurement

Regardless of the digital product, there is a unique language when quantifying the effectiveness and measuring its results. You will learn the main measurement terms and how they translate into selling digital products, across various platforms.

**Module 1:** Basics of Digital Media Measurement

## CLASS 7 Selling Digital Media

Digital is not a valid reason to have an appointment, so making the most of each opportunity is critical. You will be taught how to qualify the best digital prospects, asking the best digital C N A questions, and understand why particular products deliver certain results that will ensure success on each digital attempt.

**Module 1:** Prospecting  
**Module 2:** The Digital C N A  
**Module 3:** Aligning Solutions with Objectives

## CLASS 8 Managing Digital Ad Campaigns

So much effort and focus go into getting the sale. However, like many non-digital clients, the real work begins after the sale is made. Sellers will learn successful approaches and strategies in setting expectations, managing digital campaigns post-sale, understanding data, as well as the best way of communicating campaign results that will help ensure client renewals.

**Module 1:** Launching a Campaign  
**Module 2:** Monitoring and Optimizing  
**Module 3:** Real-Time Adjustments  
**Module 4:** Analyzing Campaign Data  
**Module 5:** Review, Prepare, Upsell

## CLASS 9 The Future of Data and Technology

The advancements in audio that broadcasters are making, continue to elevate our industry. This class explores the latest revenue growth opportunities for sellers. Radio is now able to measure the effectiveness of ads like never before. Additionally, listening habits are changing, and audio is being brought back into the home with devices such as Alexa and Google Home.

**Module 1:** Data Attribution  
**Module 2:** Technological Advancements



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The background is a green-tinted image of a forest with a path leading to a small building. The image is overlaid with a grid and binary code (0s and 1s) in a lighter green color. The text "There is no going back" is written in a large, white, sans-serif font across the top half of the image.

There is no going back

Thank you!