



Battling competitive, economic
and market forces

Fire Up the Debate: BIA/Kelsey Tackles Winning Media Strategies

BIA/Kelsey Group Webinar

2:00 to 2:45 pm EDT

June 24, 2009

Let's Meet Our Distinguished Panel



Rick Ducey
Chief Strategy Officer
BIA Advisory Services



Steve Passwaiter
VP, Business Development
BIA Advisory Services



Mike Boland
Program Director
The Kelsey Group



Mark Fratrick, Ph.D.
Vice President
BIA Advisory Services

Winning Media Strategies 2009

What attendees are saying.

Thanks for putting together an excellent conference. As each segment unfolded, I found myself saying "if this person or topic was the only subject matter covered, then it was well worth the money and time I've invested." Needless to say, I found myself repeating that line quite often during the conference. The topics and speakers were outstanding.

Brian Byrnes, President, Paramount Media Advisors, Inc.



Winning Media Strategies was a very well designed seminar. I liked the fast pace, which kept it flowing and interesting. This event took a direct approach in discussing the challenges media businesses are facing, and provided informative and instructional advice for change. We have to grow to reach new areas of success. No ostriches will survive.

Ric Gorman, CEO, GOCOM

BIA should be very proud of what it put together at Winning Media Strategies. It was outstanding! I think I learned more in the last three days than I have learned in the past three months! BIA has brilliant staff who brought together brilliant attendees with tons of new ideas to share. VERY impressive!

John Stevens, COO/Radio, Paragon Media Strategies

www.tvworldwide.com/events/bia/090520/

Topics for our Media Pundits

1. What companies need to do online
2. How to get the edge in mobile
3. Online advertising trends
4. Multiplatform selling
5. Search
6. Monetizing traditional assets

Topic 1:

What companies need to do online

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Topic 1 Summary:

What companies need to do online

1. *Shift* happens, redefine your paradigm: think of yourself as a local information/entertainment operation reaching your audiences through multiples modes of transport.
2. Have a business plan to *transform* your company into an integrated and multiplatform company.
3. Technology strategy is a critical part of your business, *don't leave it to the techies*.
4. Define *success* in terms of what outcomes you *realistically* expect to achieve and in what time frame.

Topic 2:

How to get the edge in mobile

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Topic 2 Summary:

How to get the edge in mobile

1. Key trends: Evolving device standards, growth of mobile web, open development platforms.
2. *Mobile is local.*
3. Evolving content delivery models: *Utilize the unique aspects of the device.*
4. Opportunities await broadcasters due to inherent advantages: Mobile TV, Radio, SMS engagement.



U.S. Mobile Local Search Advertising Revenues Will Reach \$1.3 Billion in 2013

Source: BIA The Kelsey Group's Mobile Local Media Forecast

The increase in consumer adoption of smartphones and mobile search is driving many local media players to experiment with mobile content and advertising as a component of the local media offering. Designed for companies that have a stake in the emerging mobile local marketing opportunity, The Kelsey Group's Mobile Local Media advisory service provides research and analysis of content, delivery (bandwidth and access device), and customer/advertiser acceptance.

MLM will answer the key questions of companies looking to leverage the mobile platform in delivering local content and applications, such as:

- Why mobile? Why now?
- How important will small-business advertising be to the growth of the mobile ad market?
- What factors will drive mobile Web growth over the next five years?

The Mobile Local Media Advantage

Mobile Local Media provides important insights and guidance on emerging trends, best practices, and product development. MLM clients gain a competitive advantage from:

Continuous Advisory Service: Benefit from a focus on mobile platforms and technologies. Leverage ongoing analysis and insight into the fast-changing local mobile space to identify new business opportunities and technology solutions. Make intelligent investment decisions by tapping into expert analyses of M&A opportunities in mobile.

Analyst Access: Access to the top local search and mobile local analysts with ties to traditional media and leading online companies enables clients to extend their internal M&A and product development team's intellectual assets to create a reliable vision of the future.

Focused Coverage: Looking at mobile from every vantage point. Coverage will include mobile ads, coupons, mapping, video, radio, gaming, social networks, premium local content, the role of traditional media, geolocation and GPS, device and platform evolution, iPhone/Android local application development, directory assistance, voice search, integration of online, traditional and out-of-home, and mobile spend by local market.

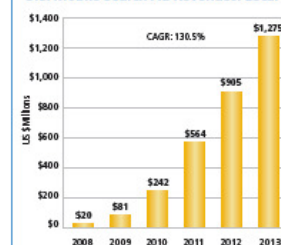
Proprietary Research: Studying the shifting patterns of advertisers and users of mobile devices, content and buying information. MLM clients have access to rich data from The Kelsey Group's Mobile Local Media Forecast, Mobile Market View consumer study and Local Commerce Monitor study of SMB advertising behaviors.



"Local search and the mobile Web: a classic combination from Kelsey."

Matt Howard
Cofounder and CEO
SMBLive

U.S. Mobile Search Ad Revenues: Local



The BIA Kelsey group
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Topic 3: Online advertising trends

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\$155 Billion* U.S. Local Media and Ad Market

Newspapers

Direct Mail

TV

Radio

Print Yellow Pages

Out of Home (Non-digital)

Cable TV

Magazines

Digital/Online Interactive

*2008 estimated total local ad revenues. Source: TKG estimate, based on various public and non-public estimates, and TKG methodology.

Steady Shift Toward Digital Media

Traditional vs. Digital Breakdown of U.S. Local Ad Market



Topic 3 Summary:

Online advertising trends

1. Digital media will garner a much bigger share of total local media advertising.
2. Online accountability will drive spending growth 2009-2013.
3. Bundling traditional and online packages can differentiate traditional media effectively for sales growth.
4. Social networking will get monetized as websites get smarter in their metrics, targeted ad placements and sales strategies.

Topic 4: Multiplatform selling

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Topic 4 Summary: Multiplatform selling

1. Audience use of new media is outpacing ad spend, it will catch up. Be sure you're prepared to *capture that spending*. Do you have the house in order?
2. There is a leadership position open in most local markets to show clients how to unlock profits from the web.
3. How do we sell the traditional and the web platform effectively?
4. Multiplatform selling is more than moving cheap display ads and repurposing existing ads.



Get Into the Passing Lane™—a state-of-the-art multiproduct sales system designed for high-volume local media sales teams

Online advertising has forever changed how sales teams must operate to be successful. Now, it's all about increasing multiplatform revenues. Let BIA show you how.

With Passing Lane, sales teams will drive increased revenues from both their traditional and online properties.

Empowering Sales Forces to Be More Effective

Our approach to sales training will give your reps the confidence to sell a complete multiproduct portfolio while helping them transition into true local media consultants.

The result? Improved revenue per sale, a more balanced product sales approach and a clear path to local media sales success.

ROI Promise

We offer a systematic approach for tracking the business impact and return on investment from our sales training approach.

There will be no doubt as to the benefit we drive for your business with our program. That's the Passing Lane advantage.

Passing Lane is offered through BIA's The Kelsey Group, known and trusted for our experience in local advertising. This training program is a new approach to multimedia sales based on our 10 years of local media sales experience.

Contact us now to see how we can help drive your sales success at www.kelseygroup.com/salestraining.asp or call 937.610.6257.

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Topic 5: Search

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Topic 5 Summary: Search

1. Develop and refine SEO/SEM strategies for two kinds of sites – *yours* and *your clients*.
2. Local search and mobile search are *high growth areas* for users and advertisers.
3. Web 3.0, the *semantic web*, is on the horizon. Be prepared.
4. Other traditional media are planning to enter. Be ready to move and move quickly.

Topic 6: Monetizing traditional assets

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Topic 6 Summary:

Monetizing traditional assets

1. Traditional media have *critical branding* that plays well across media platforms.
2. Local content, local promotion, local sales forces, *local, local, local*.
3. Take advantage of your local sales staff knowing the local advertisers
4. Make sure you've got or acquire *multiplatform rights*.
5. Leverage platform assets, don't just put old media content in new media formats.

Closing Remarks



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Media Ad View

Media Ad View reports provide the most comprehensive view of advertising trends in a local market. Combining the research and analysis of BIA and The Kelsey Group, Media Ad View offers local advertising forecasts across 12 media categories in markets nationwide. Each market level reports contains:

- An in-depth ad spend analysis across tradition advertising media and interactive media
- A snap shot of these ad spend levels for year end 2008
- A forecast for each ad segment for 2013

Mobile Local Media

Mobile Local Media provides important insights and guidance on emerging trends, best practices, and product development


Interactive Local Media

ILM is the authoritative source for research and analysis on business models, technology, advertising models and trends in the interactive local search and media space, offering a global view of local search, mobile search, social media, Internet video, directory assistance and free DA.


Marketplaces

Marketplaces is designed to analyze audience and ad media fragmentation. Where is the next “travel shift” occurring? What companies and products are poised to capture the transitioning share?


On Demand Streaming



Optional Interactive Channel

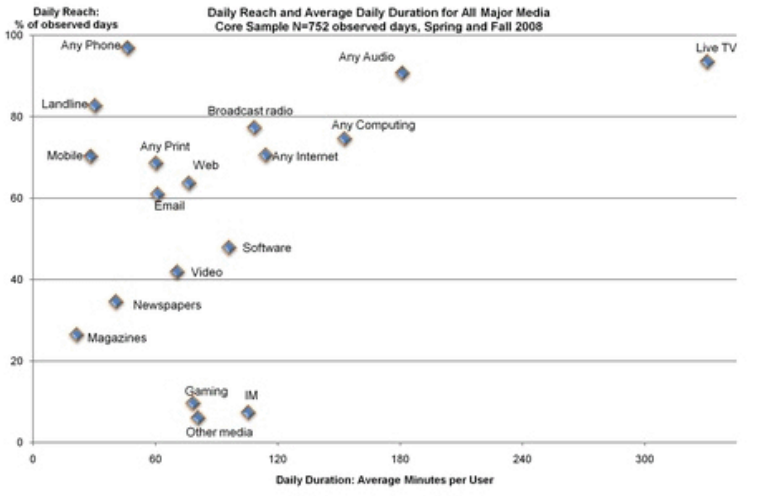


- Part 3 references A/96 (ATSC Interaction Channel Protocols)
- When the optional interaction channel is present, it shall minimally support the following protocols
 - DNS Client [RFC 1035]
 - IP [v4-RFC 791, v6-RFC 2460]
 - UDP [RFC 768]
 - TCP Client [RFC 793]
 - HTTP Client [RFC 2616]



LIVE TV CONTINUED TO DOMINATE OTHER MEDIA

Daily Reach and Average Daily Duration for All Major Media
Core Sample N=752 observed days, Spring and Fall 2008



Media Type	Daily Reach (% of observed days)	Daily Duration (Average Minutes per User)
Live TV	~95	~350
Any Audio	~90	~180
Any Phone	~95	~50
Landline	~85	~50
Broadcast radio	~80	~100
Any Computing	~75	~150
Mobile	~70	~50
Any Print	~70	~70
Web	~65	~100
Any Internet	~70	~120
Email	~60	~70
Software	~50	~100
Video	~45	~80
Newspapers	~35	~60
Magazines	~25	~50
Gaming	~10	~80
IM	~10	~100
Other media	~10	~70

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