



Webinar

Where's the Money in Local Media? Before You Plan and Budget, Track the Shifting Ad Dollars

November 16, 2011

Dial-In Information:

Toll: +1 (914) 339-0033
Access Code: 688-595-848

Introduction & Agenda

- Welcome, and thank you for joining us
- Our discussion points:
 - Economic Overview
 - National Forecast (Traditional vs. Digital)
 - Share Shifts: 2010 - 2015
 - Competition in Local Markets
 - Local Market Estimates
 - Budgeting with Media Ad View - Local Ad Reports
 - Detailed examination of two markets
 - Live Questions, FAQs



Mark Fratrik
VP, Research

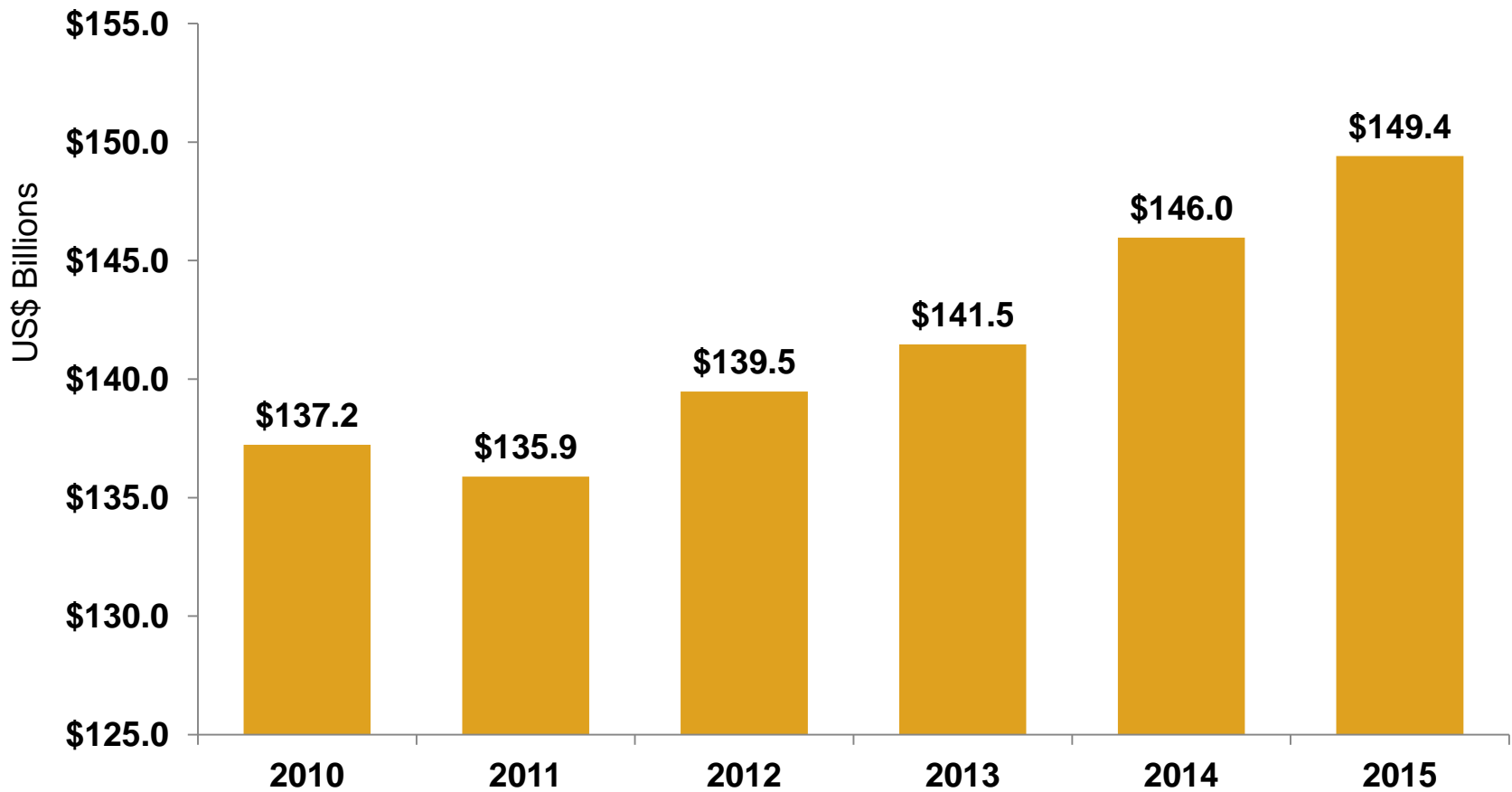


Steve Passwaiter
VP, Business
Development



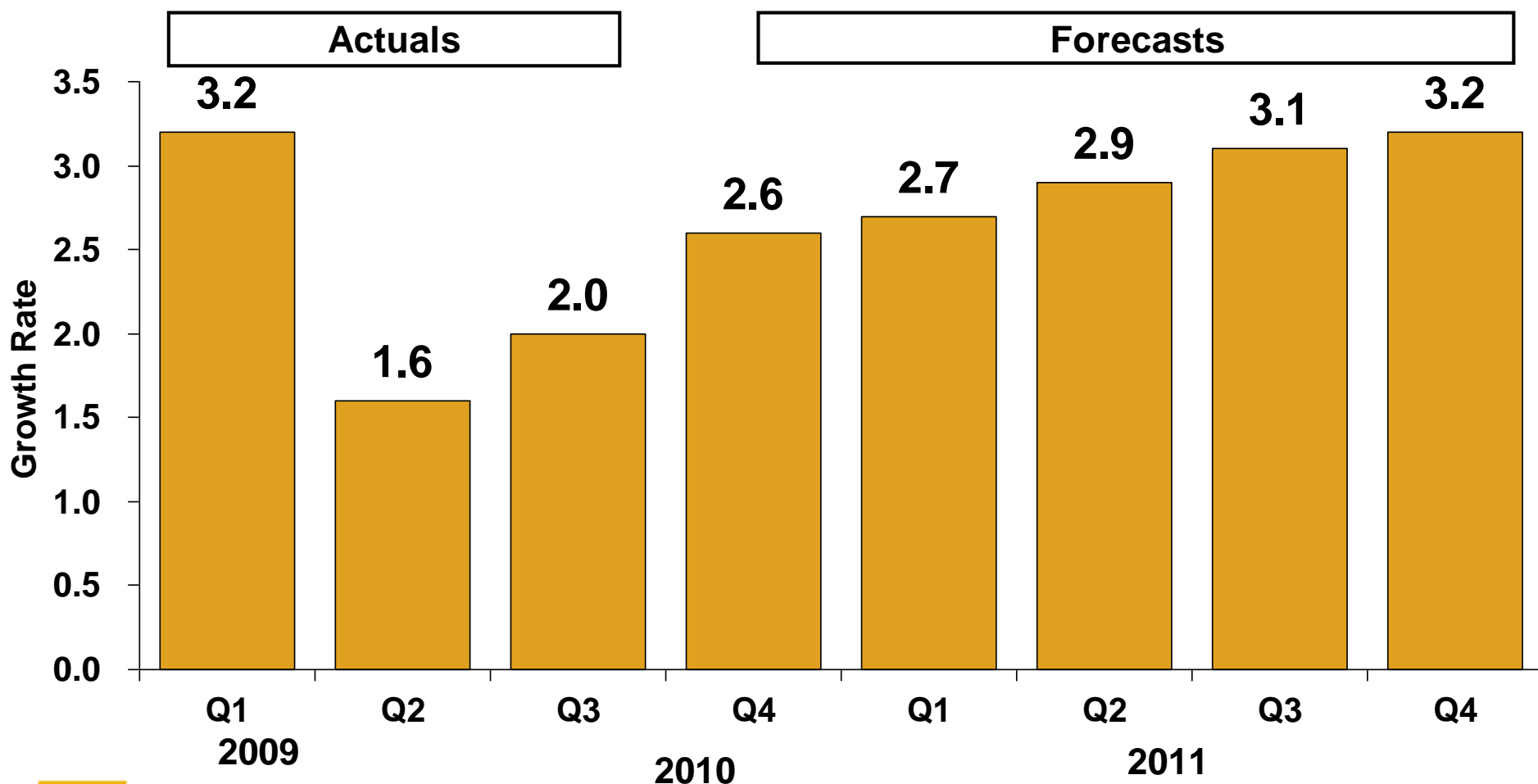
Omar Wardak
Senior Researcher

Local Media Five-Year Forecast

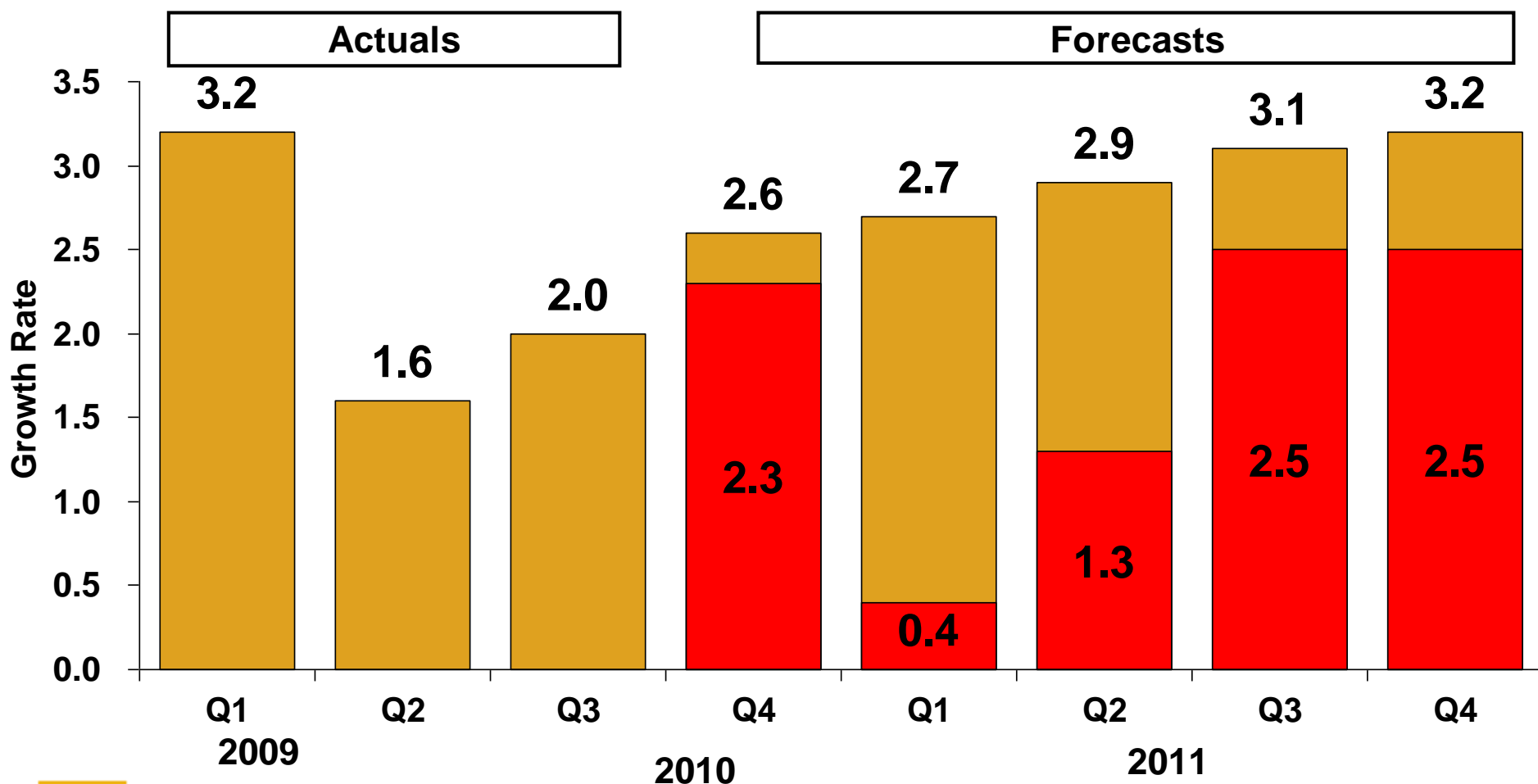


Source: BIA/Kelsey's U.S. Local Media Forecast Nov. 2011.
Note: Numbers are rounded.

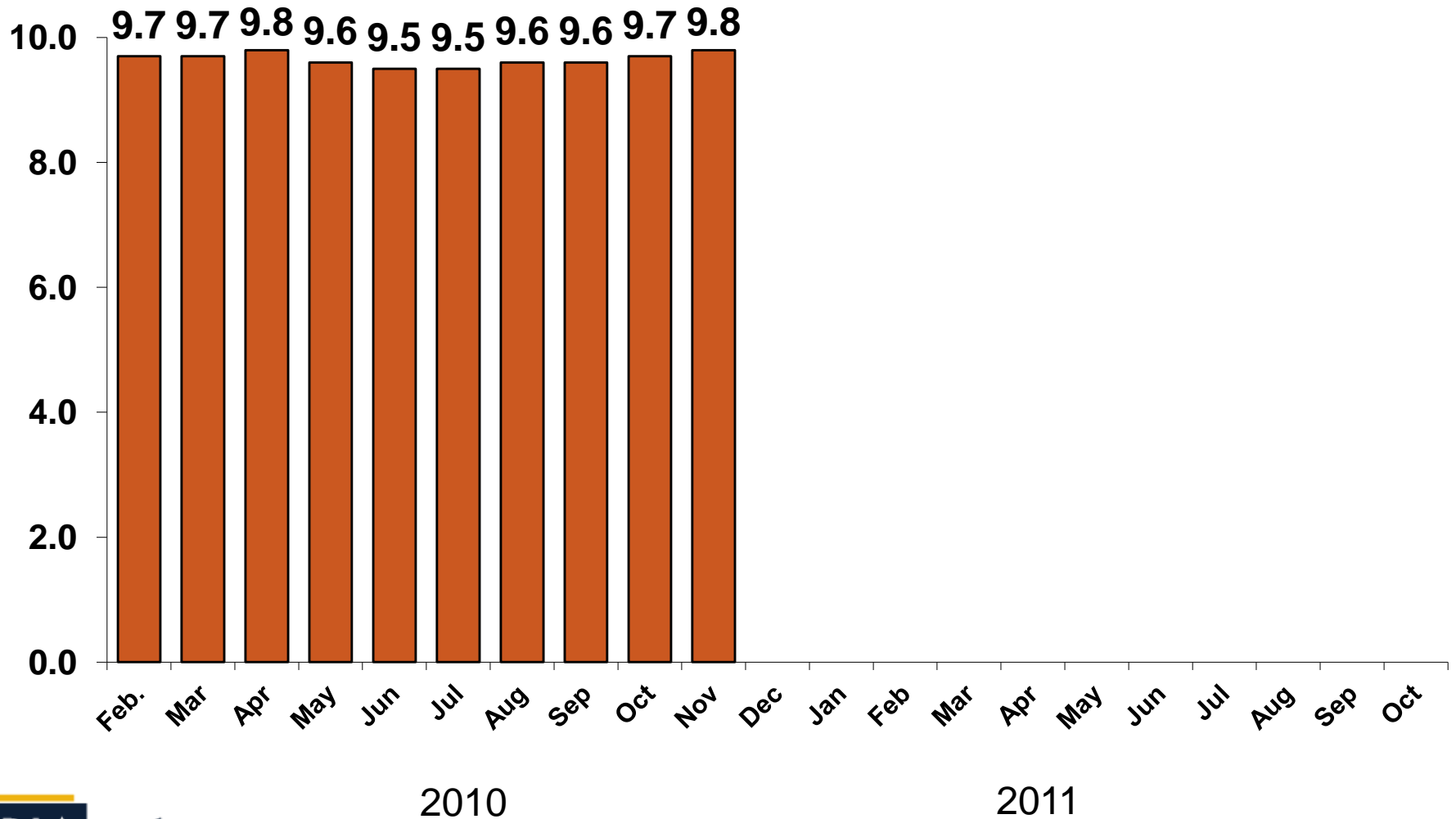
Quarterly Real GDP Growth



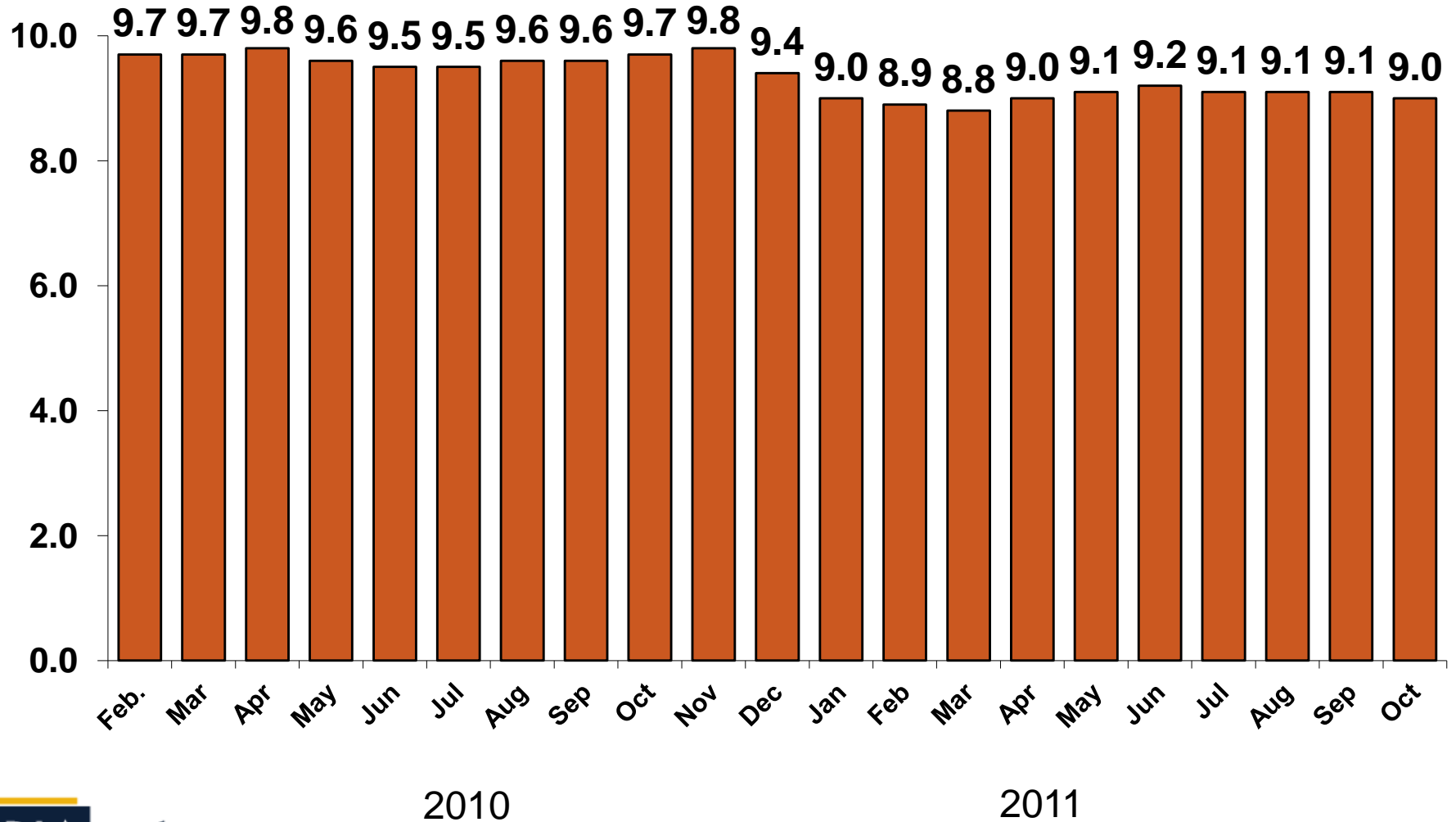
Quarterly Real GDP Growth



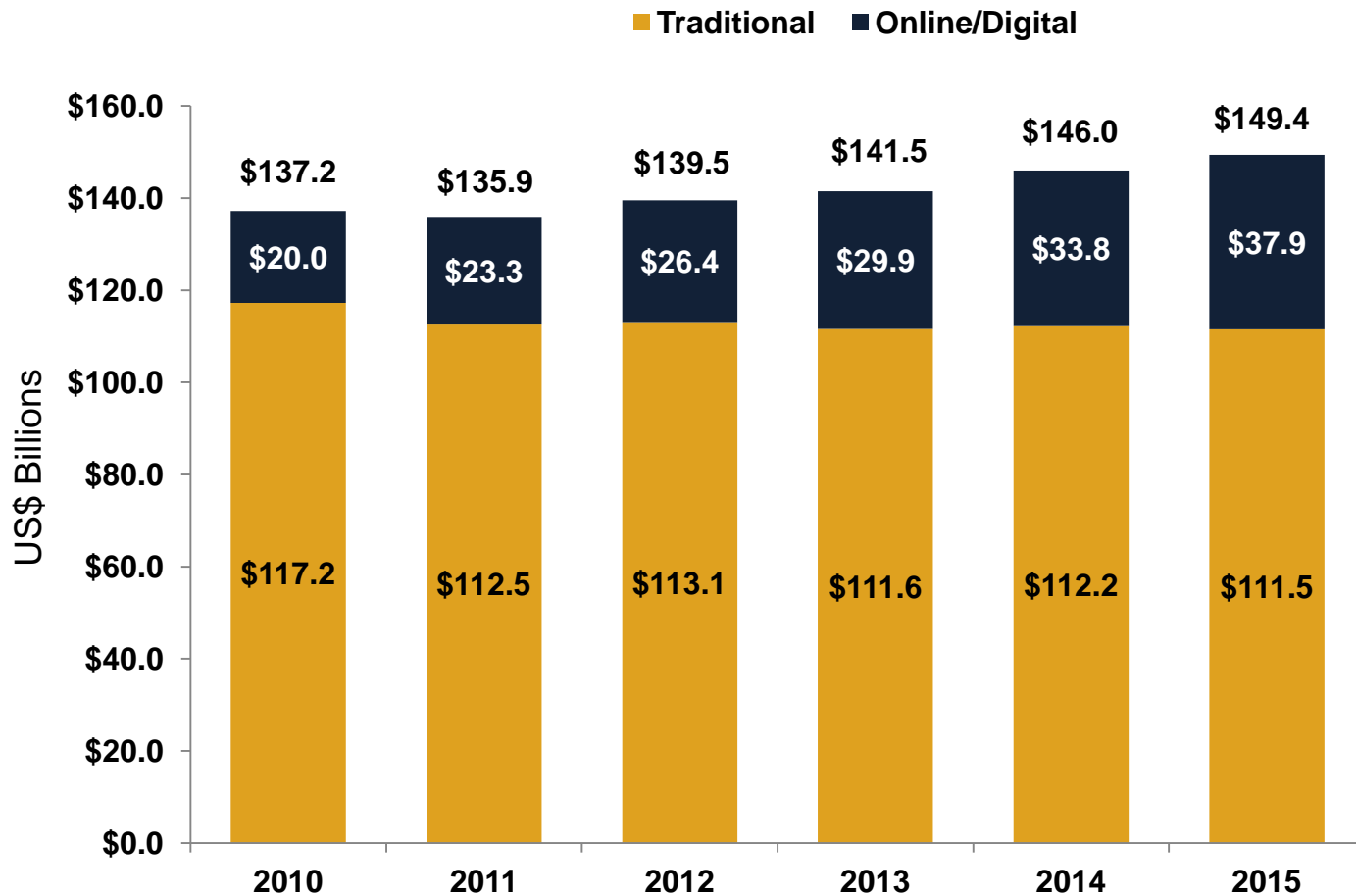
Unemployment Rate 2010



Unemployment Rate 2011



Steady Shift Toward Digital Media



2010-2015 CAGRs:

Total Media CAGR 1.7%

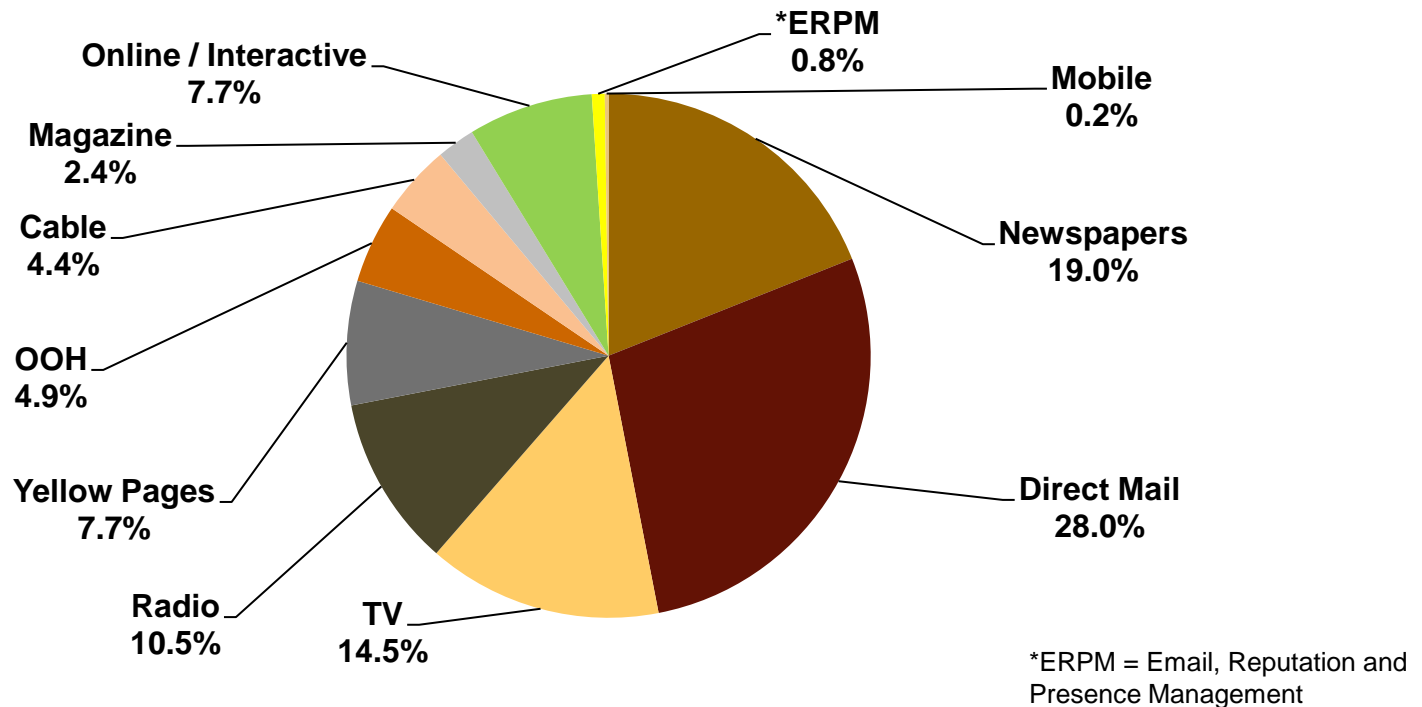
Traditional Media CAGR -1.0%

Online/Digital Media CAGR 13.6%

Source: BIA/Kelsey's U.S. Local Media Forecast Nov. 2011.
 Note: Numbers are rounded.

Local Ad Market Currently Dominated by Traditional Media

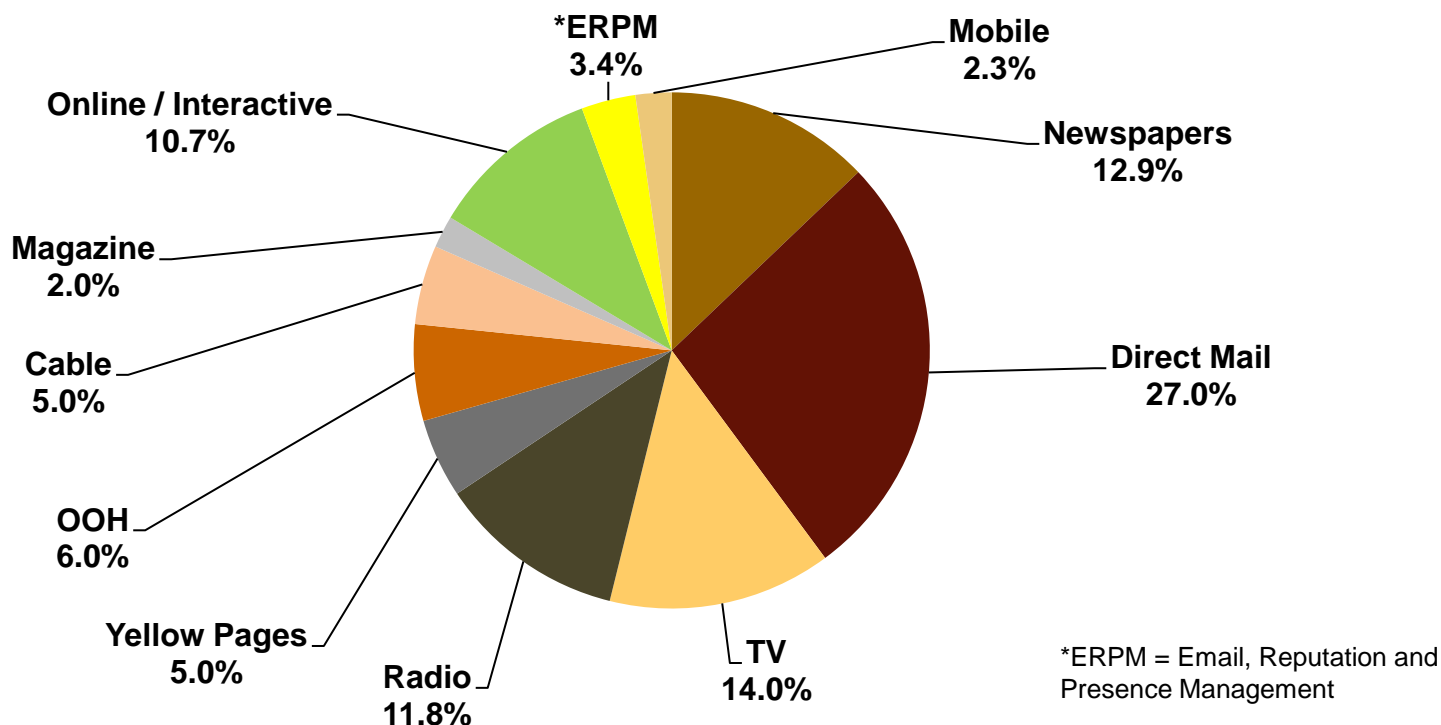
2010 U.S. Local Media Revenues — \$137.2 Billion



Note: Digital revenues associated with traditional media (e.g., websites associated with local TV stations, local radio stations, newspapers and magazines) are included in the revenues for the traditional media. Revenues for Internet Yellow Pages that are associated with print Yellow Pages are included in the overall Yellow Pages media category.

Local Ad Market Less Dominated by Traditional Media in 2015

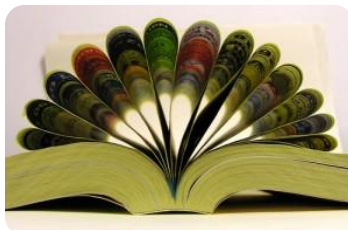
2015 U.S. Local Media Revenues — \$149.4 Billion



Note: Digital revenues associated with traditional media (e.g., websites associated with local TV stations, local radio stations, newspapers and magazines) are included in the revenues for the traditional media. Revenues for Internet Yellow Pages that are associated with print Yellow Pages are included in the overall Yellow Pages media category.

Competitive Local Media Markets

- Information these days is critical. Why?
 - More in-market competition
 - Digital ad share shifts
 - Consumer preferences
 - Emerging new growth categories



Analyzing the Local Ad Market

- **Clients have told us – *they need detailed local market information so they can see exactly what is happening in their market***
- In response, we have developed **Media Ad View**:
 - Provides a detailed picture of advertising trends for every local market
 - Covers advertising spending by media for the most recent year and for five years out (2010-2015)
 - Drills down into 93 detailed categories (e.g., tire dealers, women’s clothing stores, physicians) for different types of businesses
 - Delivers the details necessary to understand and evolve with the rapid share shift environment that continues to transform the media industry



Ad Spend by Media Category

Media Categories

- Mobile
- ERPM (E-mail, Reputation and Presence Management)
- Online Advertising
- Radio
- Newspaper
- Television
- Cable TV
- Internet Yellow Pages
- Print Yellow Pages
- Magazines
- Out-Of-Home
- Direct Mail

General Advertising Categories

- Automobile
- Education
- Financial/Insurance
- General Services
- Government/Religion
- Health Care
- Leisure/Recreation
- Media
- Real Estate
- Restaurants
- Retail
- Technology

93 Detailed Categories

Automobile Dealers & Automotive Mnftrs.
Other Motor Vehicle Dealers
Automotive Parts and Accessories Stores
Tire Dealers
Gasoline Stations & Automotive Repair
Business Schools and Computer
Technical and Trade Schools
Other Schools and Instruction
Educational Support Services
Commercial banking
Savings institutions
Credit unions, federally chartered
Securities brokerage
Portfolio management
Investment advice
Direct life insurance carriers
Direct health and medical insurance
Auto Insurance
Direct property and casualty insurance
Insurance agencies and brokerages
Legal Services
Accounting, Tax Preparation, Bookkeeping
Architectural, Engineering Services
Specialized Design Services
Computer Systems Design and Related
Management, Scientific, and Technical
Scientific Research and Development
Advertising, Public Relations Services
Other Professional, Scientific Technical
Temporary Help Services
Janitorial Services

Landscaping Services
Offices of Physicians
Offices of Dentists
Offices of Chiropractors
Offices of Optometrists
Hospitals
Nursing and Residential Care
Veterinary Services
Pharmacies and Drug Stores
Hotels-Motels
Airline Transportation
RV (Recreational Vehicle) Parks
Performing Arts Companies
Spectator Sports
Museums, Historical Sites Amusement
Parks and Arcades
Gambling Industries
Other Amusement and Recreation
Motion Picture and Video
Newspaper Publishers
Periodical Publishers
Radio Stations
Television Broadcasting
Cable and Other Subscription
Programming
Full-Service Restaurants
QSR/Fast Foods
Special Food Services
Bars
Supermarkets and Other Grocery
Convenience Stores
Beer and Wine, and Liquor Stores
Furniture Stores

Home Furnishings Stores
Floor Covering Stores
Other Home Furnishings Stores
Household Appliance Stores
Radio, Television, and Other Electronics
Computer and Software Stores
Home Centers
Paint and Wallpaper Stores
Hardware Stores
Lawn and Garden Equipment Stores
Men's Clothing Stores
Women's Clothing Stores
Children's and Infants' Clothing Stores
Family Clothing Stores
Clothing Accessories Stores
Other Clothing Stores
Shoe Stores
Jewelry, Luggage, and Leather Stores
Sporting Goods Stores
Hobby, Toy, and Game Stores
Book Stores
Department Stores
Discount Department Stores
Warehouse Clubs and Supercenters
All Other General Merchandise Stores
Office Supplies and Stationery Stores
Gift, Novelty, and Souvenir Stores
Wired Telecommunications Carriers
Wireless Telecommunications Carriers
Other Telecommunications

Charlotte, NC Total Media Overview



Charlotte, NC Overview



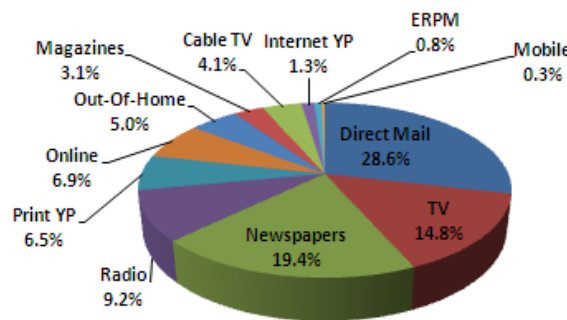
Media Ad View: Category Report



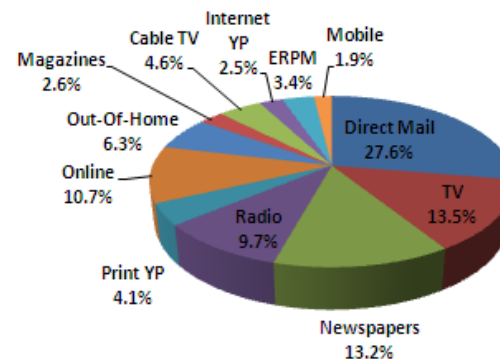
2010 Advertising Revenue Metrics By Media

	Market Total(000s)	Per Population	Per Household	Per \$1,000 Retail Sales
Cable TV	\$52,348	\$17.06	\$49.39	\$1.96
Direct Mail	\$367,152	\$119.66	\$346.40	\$13.78
ERPM*	\$10,426	\$3.40	\$9.84	\$0.39
Internet YP	\$17,022	\$5.55	\$16.06	\$0.64
Magazines	\$39,613	\$12.91	\$37.37	\$1.49
Mobile	\$3,860	\$1.26	\$3.64	\$0.14
Online	\$88,233	\$28.76	\$83.24	\$3.31
Newspapers	\$248,929	\$81.13	\$234.86	\$9.34
Out-Of-Home	\$64,196	\$20.92	\$60.57	\$2.41
Print YP	\$83,468	\$27.20	\$78.75	\$3.13
Radio	\$118,074	\$38.48	\$111.40	\$4.43
TV	\$189,650	\$61.81	\$178.93	\$7.12
Total	\$1,282,971	\$418.15	\$1,210.44	\$48.14

2010 Ad Spending by Media for TV Market



2015 Ad Spending by Media for TV Market



Charlotte, NC Automotive Category



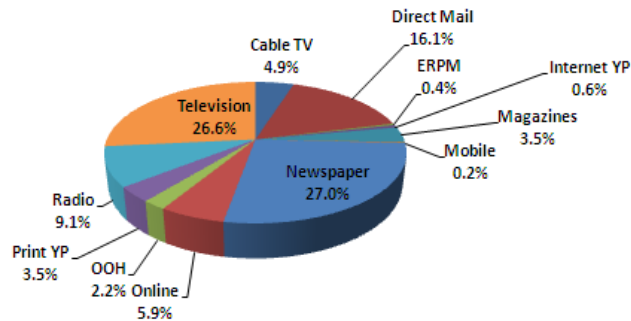
Charlotte, NC Overview

Media Ad View: Category Report

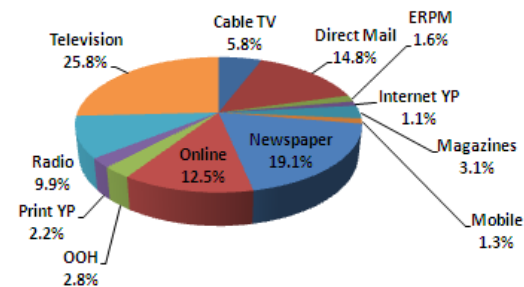
TV Market Rank: 23



2010 Automotive Ad Spending by Media



2015 Automotive Ad Spending by Media



Estimated Automobile Advertising Revenues for the Charlotte, NC TV Market

	2010 (\$000s)	% of Total	2015 (\$000s)	% of Total	\$ Change (\$000s)
Cable TV	8,368	4.9%	11,297	5.8%	2,929
Direct Mail	27,352	16.1%	28,948	14.8%	1,596
ERP	667	0.4%	3,055	1.6%	2,388
Internet YP	1,059	0.6%	2,195	1.1%	1,136
Magazines	6,001	3.5%	6,028	3.1%	27
Mobile	329	0.2%	2,481	1.3%	2,151
Newspaper	45,740	27.0%	37,231	19.1%	(8,509)
Online	10,032	5.9%	24,451	12.5%	14,419
OOH	3,661	2.2%	5,457	2.8%	1,797
Print YP	5,874	3.5%	4,362	2.2%	(1,512)
Radio	15,365	9.1%	19,332	9.9%	3,967
Television	45,051	26.6%	50,350	25.8%	5,299
Total	169,500		195,186		25,686

Automobile Detailed Categories

- Automobile Dealers & Automotive Mnfrs.
- Other Motor Vehicle Dealers
- Automotive Parts and Accessories Stores
- Tire Dealers
- Gasoline Stations & Automotive Repair

Charlotte, NC Retail Category



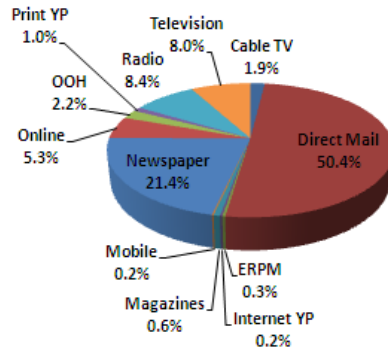
Media Ad View: Category Report

Charlotte, NC Overview

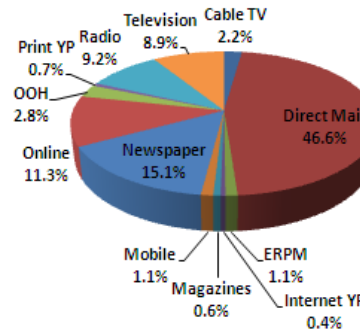
TV Market Rank: 23



2010 Retail Ad Spending by Media



2015 Retail Ad Spending by Media



Estimated Retail Advertising Revenues for the Charlotte, NC TV Market

	2010 (\$000s)	% of Total	2015 (\$000s)	% of Total	\$ Change (\$000s)
Cable TV	4,703	1.9%	6,349	2.2%	1,646
Direct Mail	123,291	50.4%	133,053	46.6%	9,762
ERPM	669	0.3%	3,060	1.1%	2,392
Internet YP	546	0.2%	1,219	0.4%	673
Magazines	1,491	0.6%	1,833	0.6%	342
Mobile	389	0.2%	3,075	1.1%	2,686
Newspaper	52,446	21.4%	43,031	15.1%	(9,416)
Online	13,056	5.3%	32,212	11.3%	19,155
OOH	5,318	2.2%	8,086	2.8%	2,769
Print YP	2,476	1.0%	1,962	0.7%	(513)
Radio	20,612	8.4%	26,193	9.2%	5,581
Television	19,582	8.0%	25,558	8.9%	5,976
TOTAL	244,578		285,631		41,053

Retail Detailed Categories

Furniture Stores	Children's and Infants' Clothing	Office Supplies
Home Furnishings Stores	Family Clothing Stores	Gift/Souvenir
Floor Covering Stores	Clothing Accessories Stores	
Other Home Furnishings	Other Clothing Stores	
Household Appliance Stores	Shoe Stores	
Radio/Television/ Electronics	Jewelry/Luggage/Leather	
Computer /Software Stores	Sporting Goods Stores	
Home Centers	Hobby, Toy, and Game Stores	
Paint and Wallpaper Stores	Book Stores	
Hardware Stores	Department Stores (except Discount Department)	
Lawn/Garden/Supplies Stores	Discount Department Stores	
Men's Clothing Stores	Warehouse Clubs and Supercenters	
Women's Clothing Stores	All Other General Merchandise Stores	

Charlotte, NC Retail Category

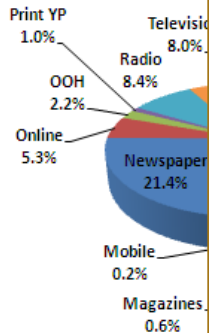


Charlotte, NC Overview



Media Ad View: Category R

2010 Retail A

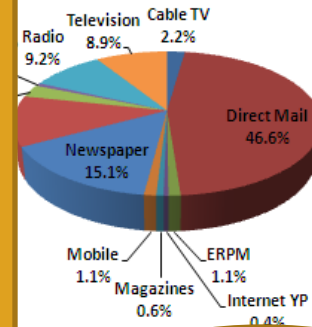


Estima for

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TOTAL	244,578

- Furniture Stores
- Children's and Infants' Clothing
- Office Supplies
- Home Furnishings Stores
- Family Clothing Stores
- Gift/Souvenir
- Floor Covering Stores
- Clothing Accessories Stores
- Other Home Furnishings
- Other Clothing Stores
- Household Appliance Stores
- Shoe Stores
- Radio/Television/ Electronics
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2015 Retail Ad Spending by Media



Retail Detailed Categories

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Interactive Report Building

- **Media Ad View: Detailed Category Reports** include an **Interactive Excel™ file** in which a subcategory can be selected to generate a series of pie charts and tables that examine that category in a local market.
- Data charts include:
 - Ad spending share by media for the current year and for each year five years out.
 - Estimated Annual Advertising Revenues
 - Share of Total Annual Advertising Revenues by Media
 - Annual Growth in Advertising Revenues by Media
- Let's look at some of the data.

Tucson, AZ

Detailed Category Report

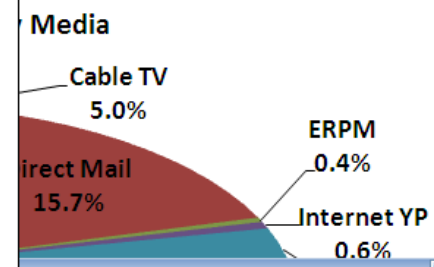
Choose a Subcategory for Ad Share Report

Below select from 1-93. Note use arrow keys on keyboard to scroll through full list.

- 1) Automotive: Automobile Dealers & Automotive Mnftrs.
- 2) Automotive: Other Motor Vehicle Dealers
- 3) Automotive: Automotive Parts and Accessories Stores
- 4) Automotive: Tire Dealers
- 5) Automotive: Gasoline Stations&Automotive Repair
- 6) Education: Business Schools and Computer and Management Training
- 7) Education: Technical and Trade Schools
- 8) Education: Other Schools and Instruction
- 9) Education: Educational Support Services
- 10) Financial/Insurance: Commercial banking
- 11) Financial/Insurance: Savings institutions
- 12) Financial/Insurance: Credit unions, federally chartered
- 13) Financial/Insurance: Securities brokerage
- 14) Financial/Insurance: Portfolio management
- 15) Financial/Insurance: Investment advice
- 16) Financial/Insurance: Direct life insurance carriers
- 17) Financial/Insurance: Direct health and medical insurance carriers
- 18) Financial/Insurance: Auto Insurance
- 19) Financial/Insurance: Direct property and casualty insurance carriers
- 20) Financial/Insurance: Insurance agencies and brokerages
- 21) General Services: Legal Services
- 22) General Services: Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- 23) General Services: Architectural, Engineering, and Related Services
- 24) General Services: Specialized Design Services
- 25) General Services: Computer Systems Design and Related Services
- 26) General Services: Management, Scientific, and Technical Consulting Services
- 27) General Services: Scientific Research and Development Services
- 28) General Services: Advertising, Public Relations, and Related Services
- 29) General Services: Other Professional, Scientific, and Technical Services
- 30) General Services: Temporary Help Services
- 31) General Services: Janitorial Services
- 32) General Services: Landscaping Services
- 33) Health: Offices of Physicians
- 34) Health: Offices of Dentists
- 35) Health: Offices of Chiropractors
- 36) Health: Offices of Optometrists
- 37) Health: Hospitals
- 38) Health: Nursing and Residential Care Facilities
- 39) Health: Veterinary Services
- 40) Health: Pharmacies and Drug Stores&Drug Advertising
- 41) Leisure/Recreation: Traveler Accommodation: Hotels-Motels
- 42) Leisure/Recreation: Airline Transportation
- 43) Leisure/Recreation: RV (Recreational Vehicle) Parks and Recreational Camps
- 44) Leisure/Recreation: Performing Arts Companies
- 45) Leisure/Recreation: Spectator Sports
- 46) Leisure/Recreation: Museums, Historical Sites, and Similar Institutions
- 47) Leisure/Recreation: Amusement Parks and Arcades
- 48) Leisure/Recreation: Gambling Industries
- 49) Leisure/Recreation: Other Amusement and Recreation Industries
- 50) Leisure/Recreation: Motion Picture and Video Exhibition
- 51) Media: Newspaper Publishers
- 52) Media: Periodical Publishers



g View:
Automotive Mnftrs.



Detailed Category: Health – Physicians 2010

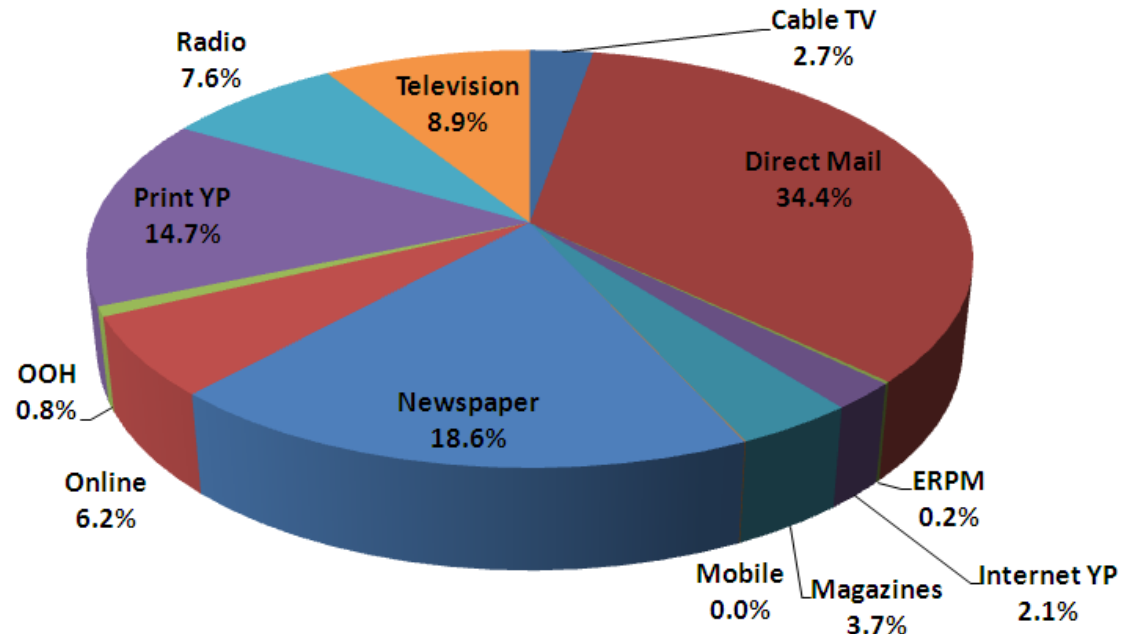


Tucson, AZ
TV Market Rank: 67



*Detailed Category Spending View:
Health: Offices of Physicians*

2010 Ad Spending Share by Media



Detailed Category: Health – Physicians 2015

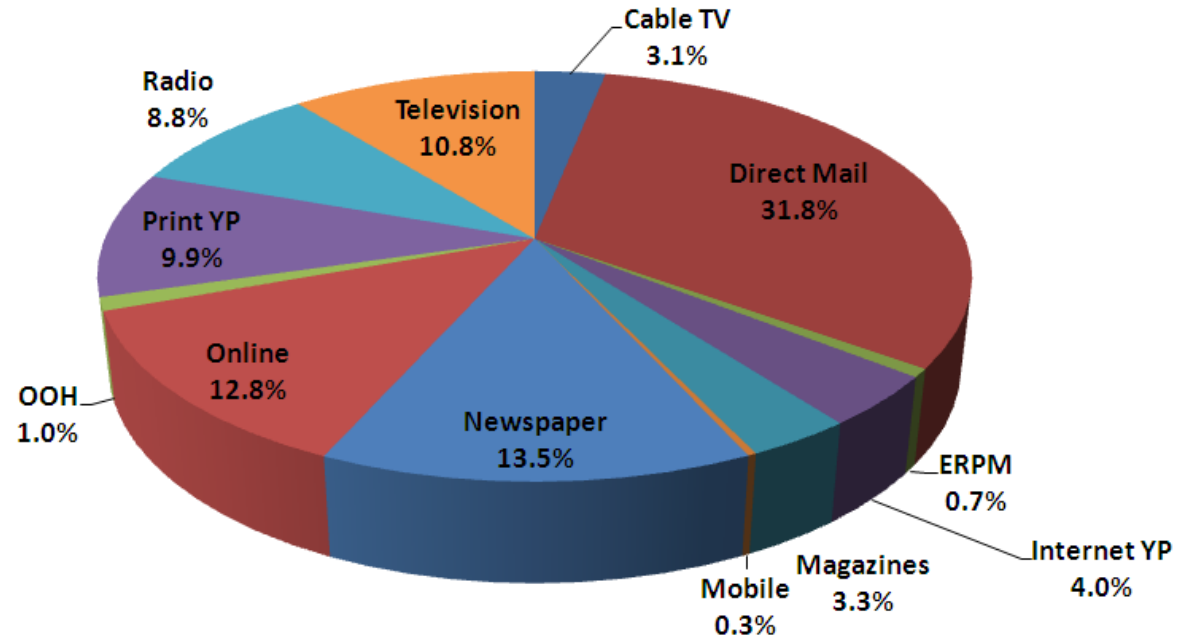


Tucson, AZ
TV Market Rank: 67



*Detailed Category Spending View:
Health: Offices of Physicians*

2015 Ad Spending Share by Media



Detailed Category: Auto Dealers & Mnfrs 2010



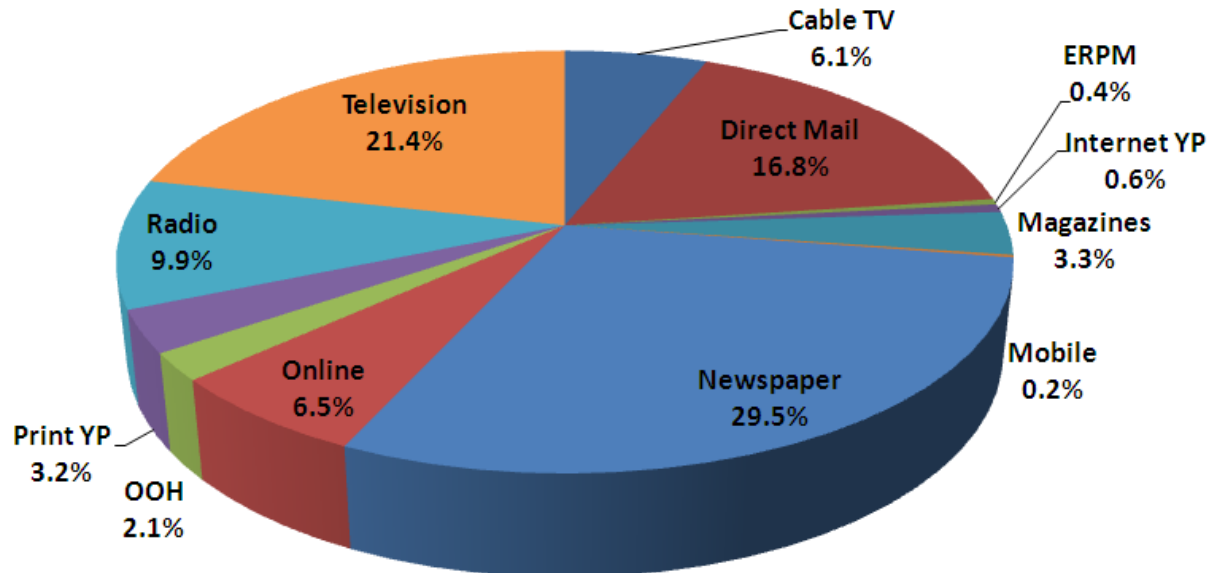
Austin, TX

TV Market Rank: 44



*Detailed Category Spending View:
Automotive: Automobile Dealers & Automotive Mnfrs.*

2010 Ad Spending Share by Media



Detailed Category: Auto Dealers & Mnfrs 2015



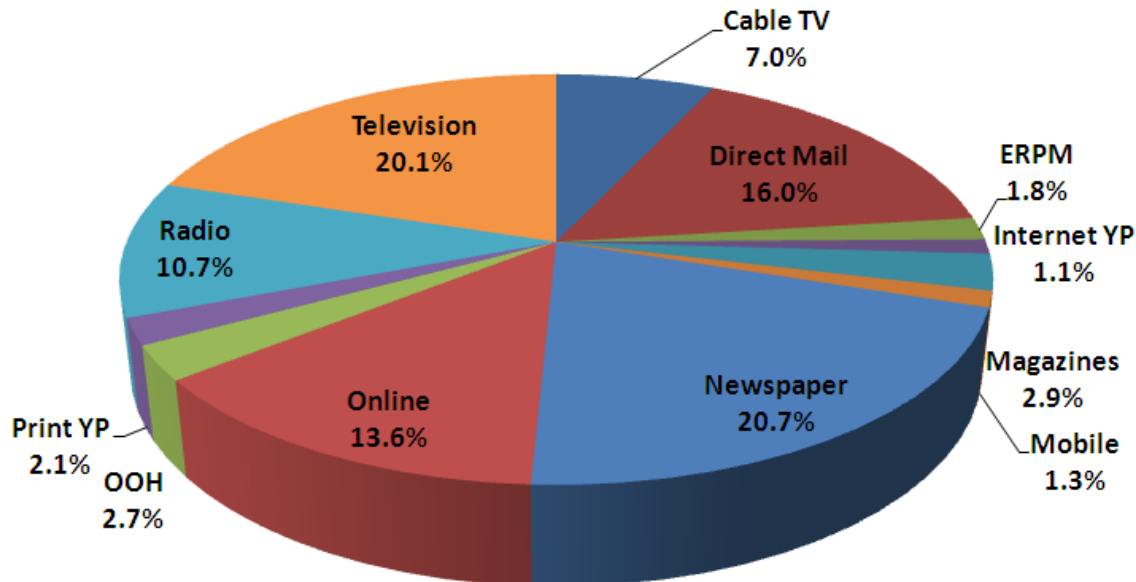
Austin, TX

TV Market Rank: 44



*Detailed Category Spending View:
Automotive: Automobile Dealers & Automotive Mnfrs.*

2015 Ad Spending Share by Media



How Clients Use MAV Reports

- **What our clients have told us:**
 - **Identify ALL the competition in the market** – *not just the ones in your specific media*
 - **Zero in on the revenue drivers in your particular market**
 - Track where there's major spending in a category right now
 - Track where local ad dollars are shifting
 - Plan and budget for these changes
 - **Prepare effective media plans for different Ad prospects**
 - Determine platform strategies based on future growth and metrics for different ad categories
 - Determine the potential budgets of prospects to prepare a “winnable” sales strategy
 - **Create professional, effective sales collateral**
 - **Train sales teams as multi-platform Ad consultants**



Brief Recap of Methodology

- BIA/Kelsey has been tracking media for over 27 years
- We have a “bottom up” and “top down” approach
 - Significant feedback from major players in all of these local media industries
 - Local demographic and economic data to allocate across markets
- Utilize national and local information revenue and economic/demographic to estimate across general and detailed categories
- **Clients have told us that our estimates are the most reliable in the business. We take great pride in maintaining this position.**

Special Purchase Offer

- Current List price:
 - \$2,495/market
- Webinar promo:
 - \$1,995/market.
 - Want multiple markets? Bundle offer available.
 - Must be purchased by Nov. 30, 2011
 - Visit: www.biakelsey.com/MAV for report details.
 - To purchase, email: sales@biakelsey.com or call: (703) 818-2425

BIA Kelsey



Media
Ad View

Your Sales and Budgeting Advantage

2010-2015 Total Advertising
Revenues by Media



2010 Ad Spending
Share by Media



2015 Ad Spending
Share by Media

BIA Kelsey

Frequently Asked Questions

How are the various media estimates generated especially in the smallest markets?

Answer:

- Both bottom up and top down approaches - depending upon the specific media
- Local economic and demographic data are taken into account when allocating the national estimates for specific markets
- Projections on the growth of population, retail sales, and aggregate disposable income
- Other local factors (e.g., relative health of local economy, other events affecting local economy, etc.)

What does the Total Local Television Market Revenue Estimate include?

Answer:

- All over-the-air advertising revenues generated from both national and local advertisers including political advertising revenues
- All online revenues generated by local television stations
- Does **not** include:
 - Any network advertising
 - Retransmission consent revenues
 - Trade and barter
 - Production revenues

Can we get more details on the online advertising components (e.g., how much is search, display)?

Answer:

- Media Ad View is a product that we are constantly updating and refining.
- Currently, we are in the process of developing those estimates based upon local information obtainable on search activity within each and every market.
- Considerable amount of data is being collected to generate those market specific estimates.
- If you purchase a report now, this update will be provided to you as soon as it is available.

Special Purchase Offer

- Current List price:
 - \$2,495/market
- Webinar promo:
 - \$1,995/market.
 - Want multiple markets? Bundle offer available.
 - Must be purchased by Nov. 30, 2011
 - Visit: www.biakelsey.com/MAV for report details.
 - To purchase, email: sales@biakelsey.com or call: (703) 818-2425

BIA Kelsey



Media
Ad View

Your Sales and Budgeting Advantage

2010-2015 Total Advertising
Revenues by Media



2010 Ad Spending
Share by Media



2015 Ad Spending
Share by Media

BIA Kelsey



Questions and comments:

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Omar Wardak | owardak@biaklesy.com | 703.818.2425

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