



Webinar | March 23, 2021

2021 Local Digital Event Series: Road Trips

SalesFuel

BIA | ADVISORY
SERVICES

Welcome! Thank You for Joining Us



HOST: Audrey Strong
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SalesFuel



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BIA Advisory Services



Tom Buono
CEO & Founder
BIA Advisory Services




C. Lee Smith
President & CEO SalesFuel

Today's Discussion

- Road Trips (Leisure) Vertical Ad Forecast for 2021
- Market Trends and Second-Half 2021 Projections
- Digital Selling Strategies
- Deep Sub-Vertical Analysis:
 - Traveler Accommodations: Hotels-Motels
 - Museums, Historical Sites, and Other Venues
 - Gambling and Lotteries
 - Other Motor Vehicle Dealers
- Coming in April - **2021 Local Digital Event Series: OTT**

Effects of Pandemic: Airline Travel Still Way Off from 2019 Levels



Airline Travel off over 60%

- Very little travel in April or May 2020
down 90%+

Still off significantly in the first two months of 2021

- Jan 2021 **down 61.9%** from Jan 2020
- Feb 2021 **down 59.5%** from Feb 2020

Source: Transportation Security Administration (TSA)

Driving (Including Road Trips) Put on Hold in 2020

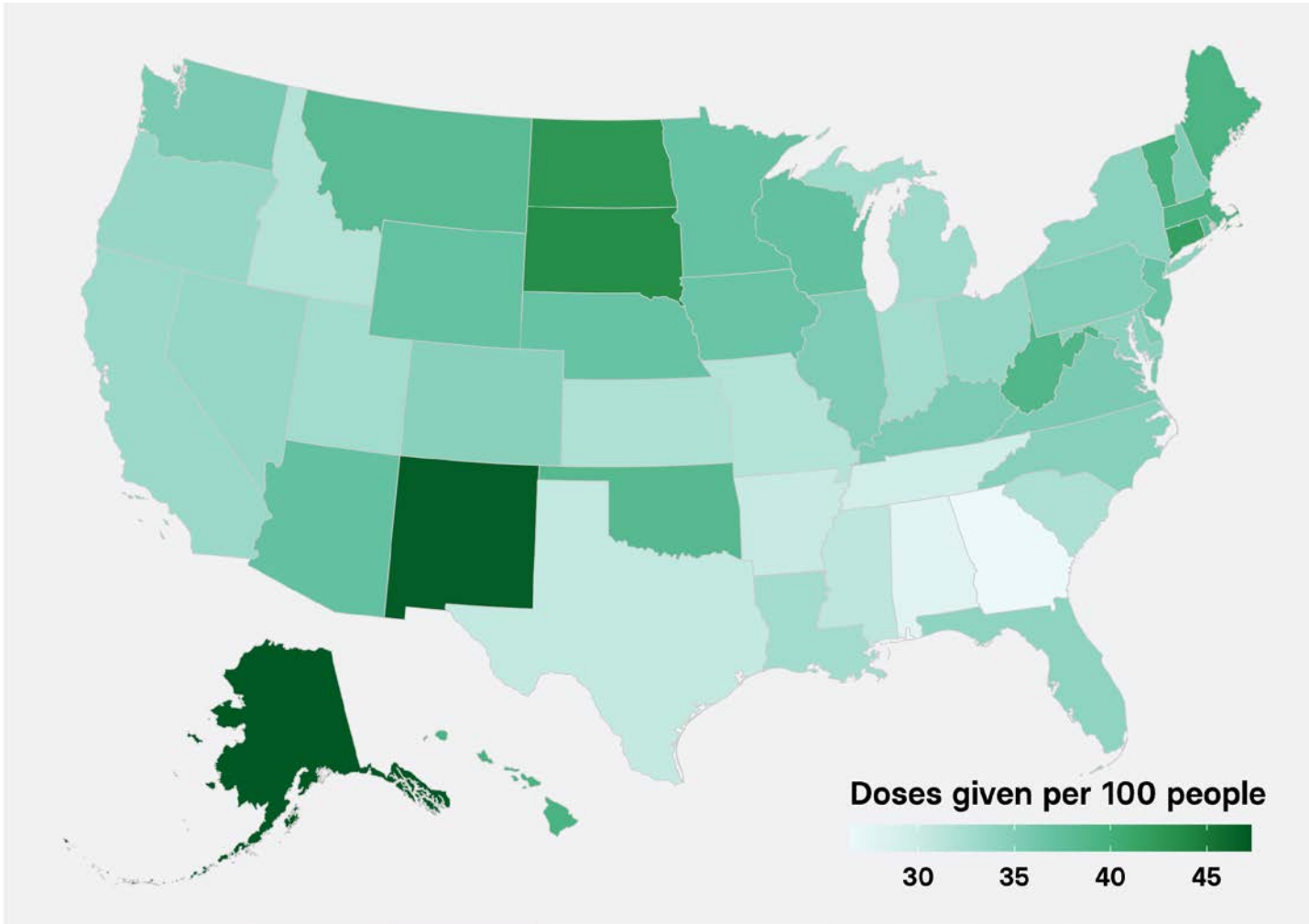
US Monthly Total Vehicle Miles Traveled

	2020	2019	% Change
December	244,136	272,191	-10.3%
November	233,773	261,735	-10.7%
October	259,203	282,972	-8.4%
September	247,157	268,847	-8.1%
August	252,718	286,439	-11.8%
July	260,094	292,680	-11.1%
June	247,379	284,106	-12.9%
May	212,672	285,544	-25.5%
April	165,903	276,976	-40.1%
March	221,053	272,537	-18.9%
February	233,931	229,346	2.0%
January	251,687	246,517	2.1%
Total	2,831,726	3,261,909	-13.2%

Significant downturn in driving beginning in March 2020 because well... We all know why.



But Now! Vaccines = Road Trips in 2021



About 80 million Americans have received at least one dose. Well over 50% of the US population will have at least one dose by sometime in June.

The U.S. could reach herd immunity by summer through vaccinations alone.



Tom's Next Road Trip

Myrtle Beach



Lee's Next Road Trip



NEMACOLIN

SINCE 1987

Celine's Next Road Trip



Audrey's Next Road Trip



Where Do YOU Want/Plan to Go?

Let's take a poll



Road Trips (AKA Leisure) Vertical Ad Spend in 2021

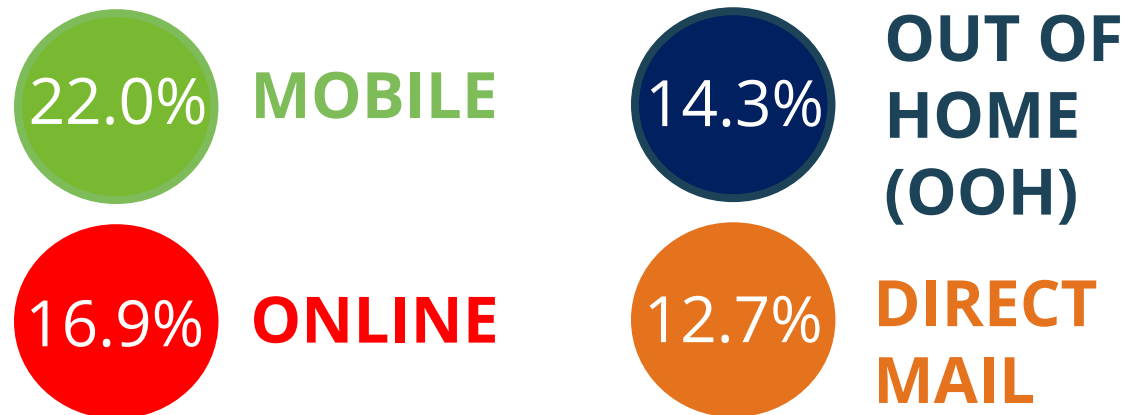
Forecasted Ad Spend in 2021

\$10.2B

In local advertising in All Markets
Up from \$8.7 B in 2020 yet down from
\$13.2 B in 2019

-34% Decline in 2020
+16.5% Rebound in 2021

Top Media Choice by Share of Wallet



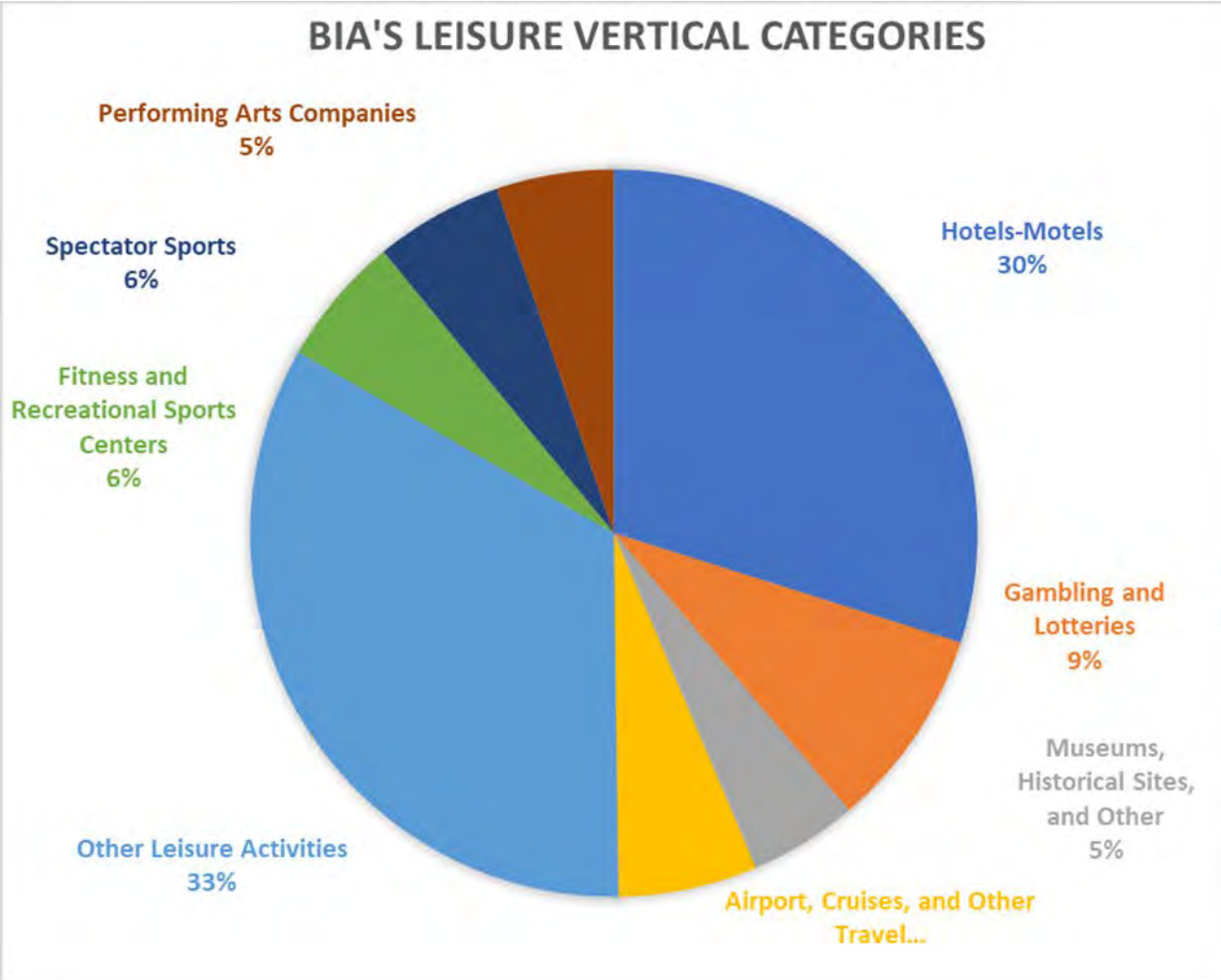
Source: BIA ADVantage, 2021 U.S. Ad Forecast

Leisure & Recreation Advertising Bouncing Back after Big Pandemic Hit

Bounce Back in 2021 after Devastating 2020

Tourism and Travel Services	21.9%
Motion Picture and Video	20.6%
Airport, Cruises, and Other	19.3%
Amusement Parks and	18.5%
Performing Arts Companies	18.5%

2021 Local Advertising Shares of Vertical

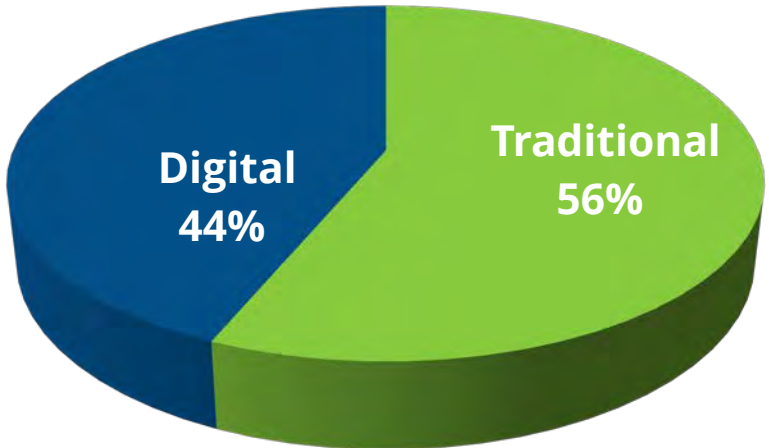


BIA tracks 11 Leisure & Recreation categories, Hotels-Motels is the largest at 30%

Traveler Accommodation: Hotels-Motels
Other Amusement and Recreation Industries
Gambling and Lotteries
Airport, Cruises, and Other Travel
Tourism and Travel Services
Motion Picture and Video Exhibition
Fitness and Recreational Sports Centers
Spectator Sports
Performing Arts Companies
Museums, Historical Sites, and Other Venues
Amusement Parks and Arcades

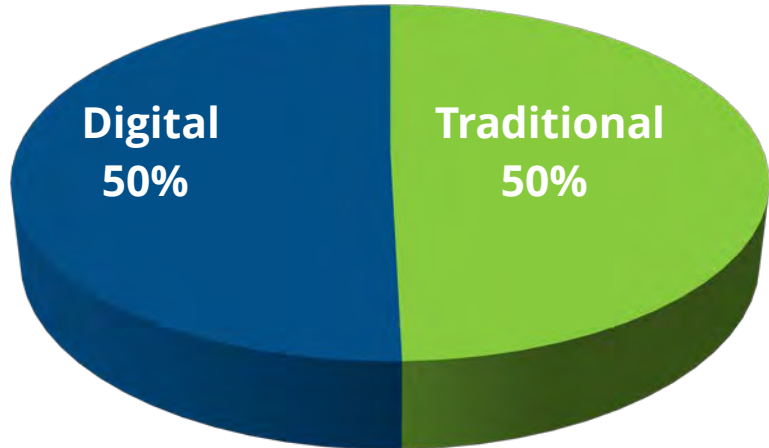
Road Trips (Leisure) Ad Spend: Share of Traditional & Digital

2019

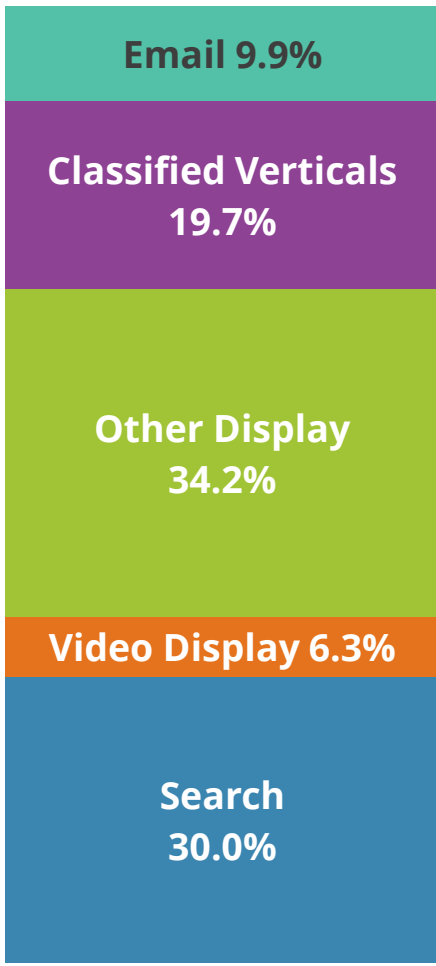


Digital ad spending has grown significantly in the last two years. In 2021 we will see spend on digital to start to overtake traditional in this vertical.

2021



\$5.1B in Digital Ad Spend in 2021



Other Display and Search spend through the next five years make up the majority of digital spend.

Source: BIA ADVantage, 2021 U.S. Ad Forecast

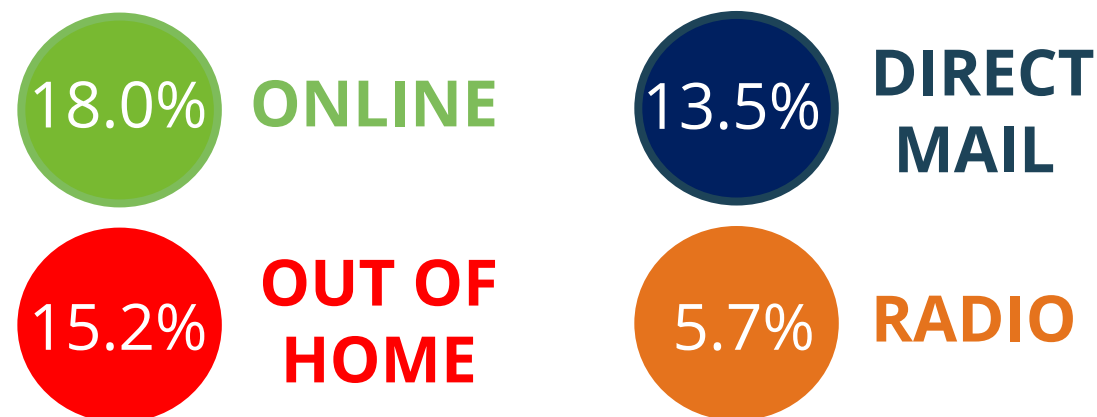
Sub-vertical Analysis

Traveler Accommodation: Hotels- Motels

Traveler Accommodation: Hotels-Motels: Ad Spend & Share of Wallet

In 2021 Hotels & Motels Spends

\$3.0B



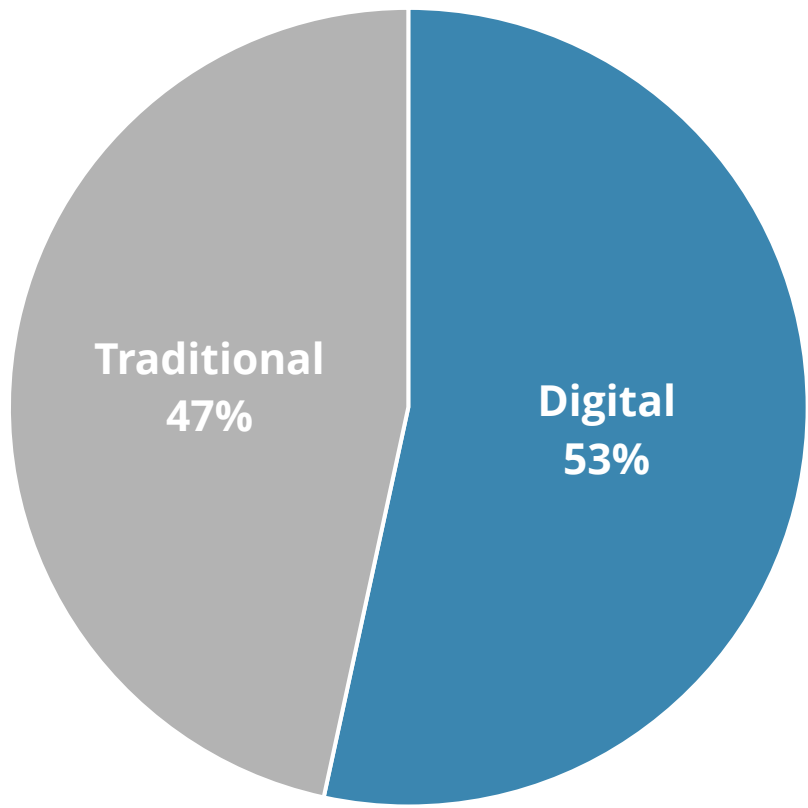
In local advertising in All Markets
Mobile Gets 23.4% or \$712.9M

* BIA ADVantage clients can run **local alert reports** in the platform. See "Vertical Alerts" in the Market Reports area.

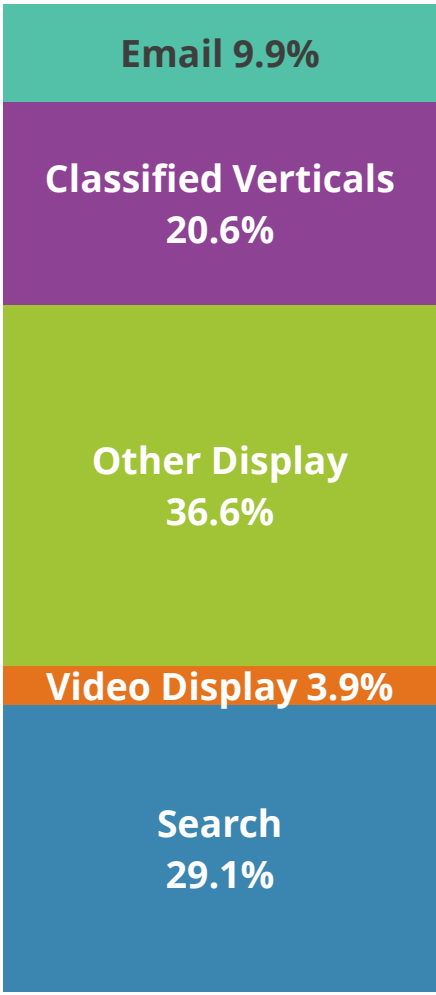
Source: BIA ADVantage, 2021 U.S. Ad Forecast

Traveler Accommodation: Hotels & Motels: Traditional & Digital Share

\$3.0B in 2021



\$1.6B in Digital Ad Spend in 2021



BIA ADVantage, 2021 U.S. Ad Forecast

2021 Market Trends



- Hotel industry went from 66% occupancy in 2019 to 44% in 2020. For 2021, operators are projecting **52%** occupancy, still below a break-even level for many.
- First post-pandemic trips will be to reconnect family, like family reunions and weddings, **starting Q2 2021**
- **61%** of consumers want to travel after vaccination. Of those people, 83% want to take 2 domestic trips and 44% will take 2 international trips.
- 41% of domestic travelers will spend **\$2,500+** on trips
- About half of business travelers will stay in hotels for leisure trips once vaccinated. 62% of frequent business travelers will take more leisure trips than last year. **Only 5% will take more business trips.**

SOURCE: AdMall® Local Account Intelligence Reports, SalesFuel.com, 2021

Digital Audience for Domestic Vacationers

- Domestic Vacationers are **27% more likely** to think more favorably of a business that responds to negative reviews than the average US adult.



SOURCE: 11th annual AudienceSCAN® study of U.S. consumer behavior
SalesFuel.com [n= 15,281 adults online]

Selling to Hotels and Motels 2021

- **Ask:** What is your average TrevPAR?
- Remind them to **update messaging** based on state-mandated policies on their websites, social media.
- Recommend messaging that reduces risk for potential guests. For example, fully-refundable vacation rentals get 4.2X more bookings and higher revenue.
- **Feature the destination prominently in SEO keywords.**
- **Reputation management is critical.** 78% of travelers check online reviews before booking a hotel.

Question?

Please enter your question into the control panel.

If we don't answer your question during the webinar, we will answer via email after the webinar.



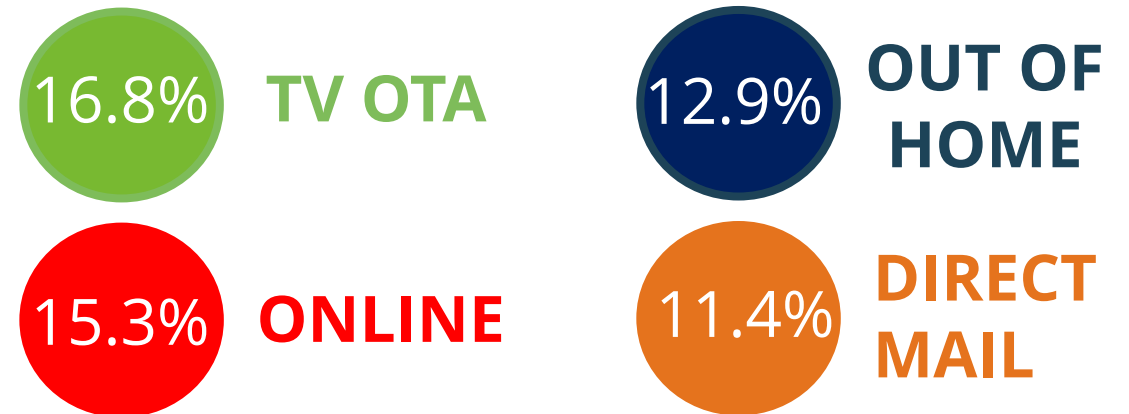
Sub-vertical Analysis

Museums, Historical Sites, and Other Venues

Museums, Historical Sites, and Other Venues: Ad Spend & Share of Wallet

In 2021
Museums, Historical
Sites, and Other Venues
Spends

\$490M



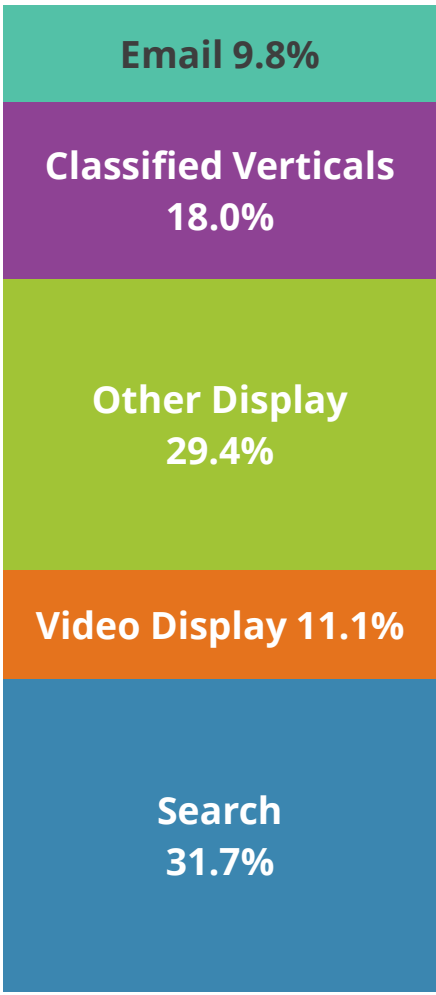
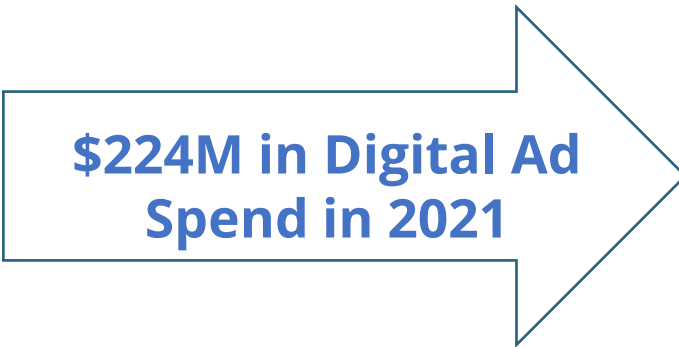
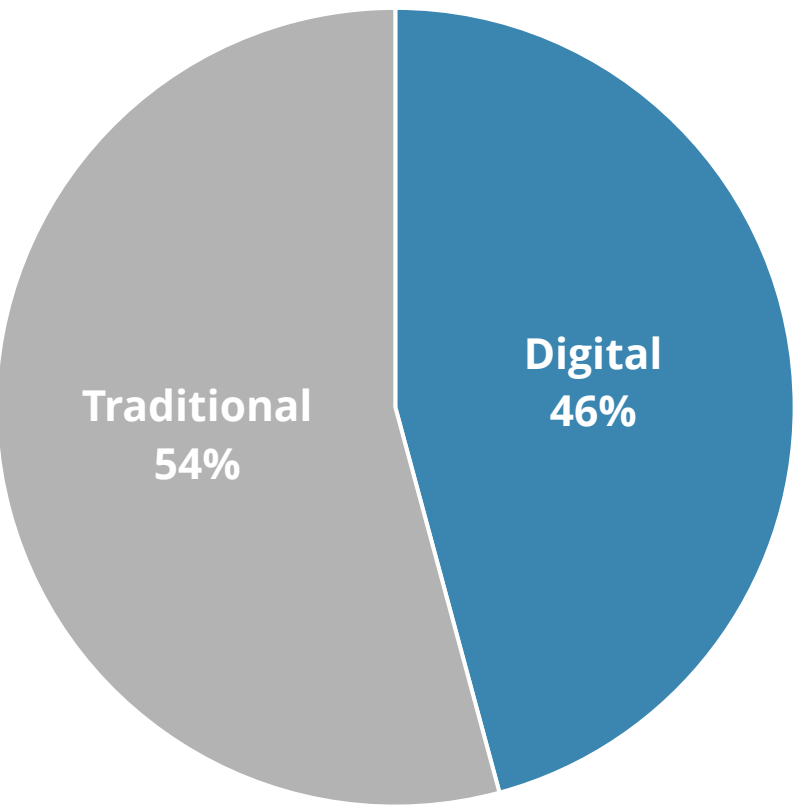
In local advertising in All Markets
Mobile Gets 20.0% or \$97.8M

* BIA ADVantage clients can run **local alert reports** in the platform. See "Vertical Alerts" in the Market Reports area.

Source: BIA ADVantage, 2021 U.S. Ad Forecast

Museums, Historical Sites, & Other Venues: Share of Traditional & Digital

\$490M in 2021



BIA ADVantage, 2021 U.S. Ad Forecast

2021 Market Trends



- Some consumers will want the security of traveling in their own vehicles and will **take vacations closer to home**, visiting natural attractions in order to escape the crowds.
- **State and National Parks** will attract 18.5% of U.S. adults in 2021.
- **Theme park operators** couldn't celebrate the planned debut of new rides and attractions last year.
- **Museums** are supplementing revenue by promoting their spaces for private events such as wedding receptions.

SOURCE: AdMall® Local Account Intelligence Reports, SalesFuel.com, 2021

Digital Audience for Amusement Park Patrons

- **40.1%** of Amusement Park Patrons have responded to ads on a social network in the past 30 days.

SOURCE: 11th annual AudienceSCAN® study of U.S. consumer behavior
SalesFuel.com [n= 15,281 adults online]



Selling to Tourist Attractions 2021

- **Ask:** What is your expected maximum allowable capacity?
- Sell **recruitment advertising** now to help these businesses staff up for the peak summer months.
- Recommend **highly-visual social media platforms** like Instagram, Pinterest and YouTube.
- Build relationships with **tourism/visitor's bureaus**. Not only could they become an advertiser, but they can also direct you toward others that need your help.

Questions?

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Sub-vertical Analysis

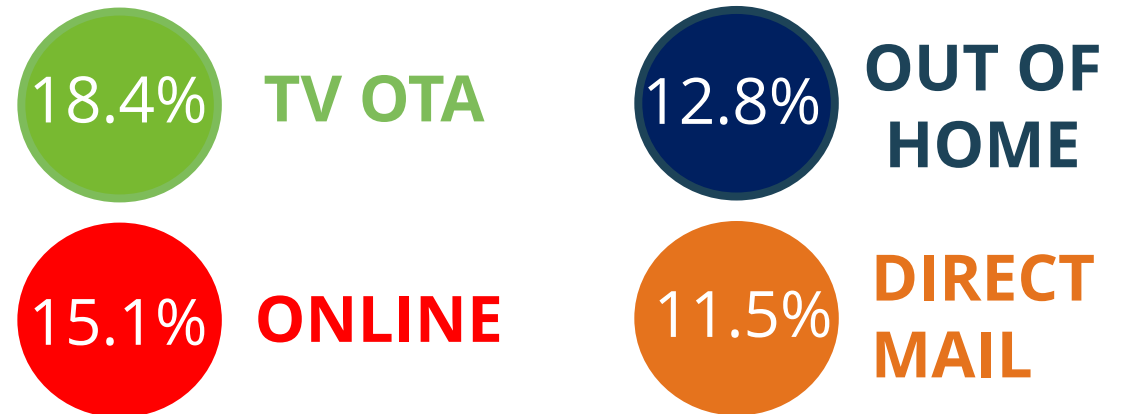
Gambling and Lotteries

Gambling and Lotteries: Ad Spend & Share of Wallet

In 2021
Gambling & Lotteries
Spends

\$910M

In local advertising in All Markets
Mobile Gets 19.1% or \$174.0M

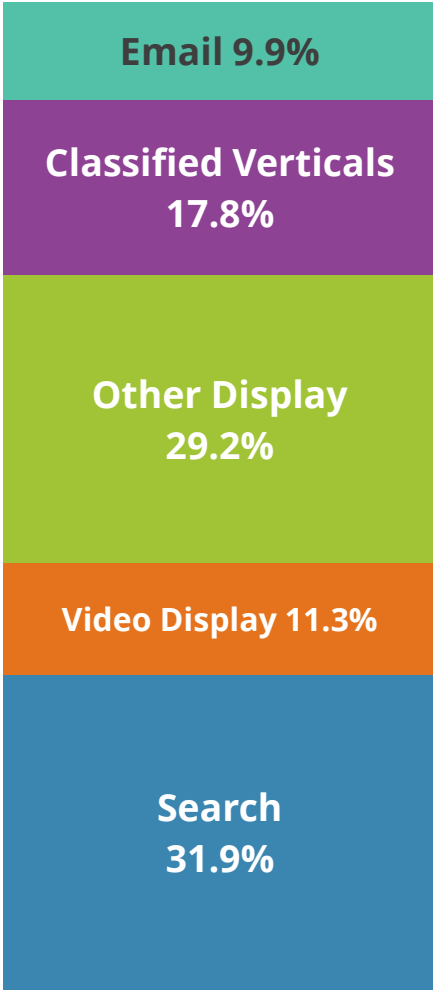
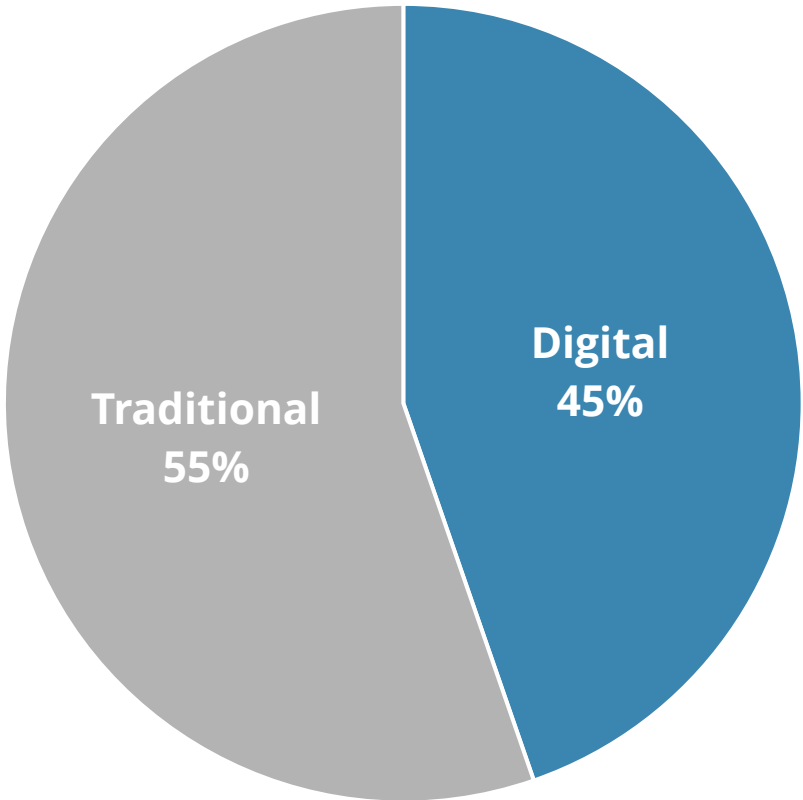


* BIA ADVantage clients can run **local alert reports** in the platform. See "Vertical Alerts" in the Market Reports area.

Source: BIA ADVantage, 2021 U.S. Ad Forecast

Gambling and Lotteries: Share of Traditional & Digital

\$910M in 2021



BIA ADVantage, 2021 U.S. Ad Forecast

2021 Market Trends



- Casino revenue dropped 30% in 2020.
- Some casinos will experience recovery to nearly full traffic by the end of 2021.
- But not destinations that rely on business travel and conventions.
- Half of Americans live in states soon to offer sports gambling.
- Poker rooms are beginning to reopen in many locations.

SOURCE: AdMall® Local Account Intelligence Reports, SalesFuel.com, 2021

Digital Audience for Casino Guests

- **Casino Guests are 44% more likely than all U.S. adults to respond to a daily deal or digital coupon.**

SOURCE: 11th annual AudienceSCAN® study of U.S. consumer behavior
SalesFuel.com [n= 15,281 adults online]



Selling to Casinos 2021

- **Ask:** What is your expected maximum allowable capacity? When do you expect that to increase?
- Focus **SEM on in-state** visitors or those within a short drive, use the state name prominently in SEO.
- Recommend **highly-visual social media platforms** like Instagram, Pinterest for promoting winners, restaurants and special events.
- Recommend **promotional offers** in compliance with state laws using digital coupons.

Questions?

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Sub-vertical Analysis

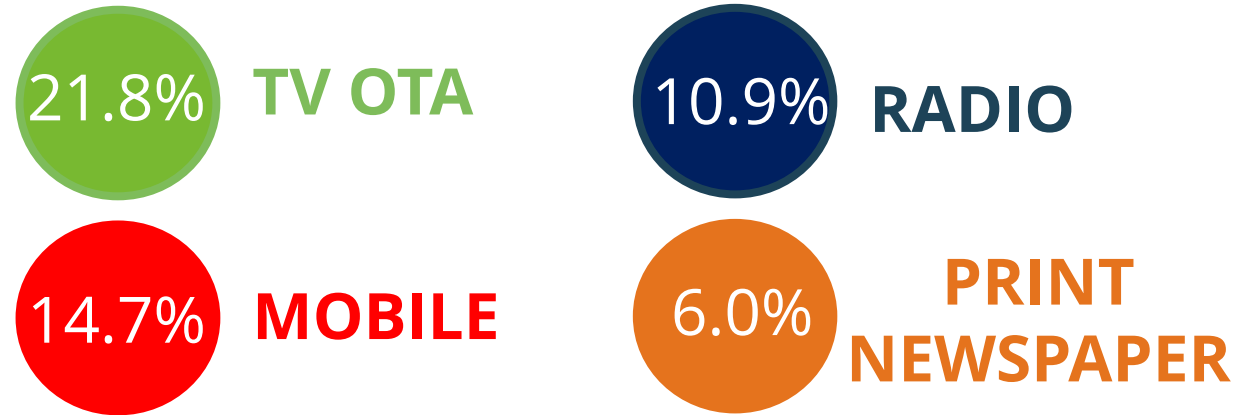
Other Motor Vehicle Dealers

Other Motor Vehicle Dealers Ad Spend

In 2021
Other Motor Vehicle Dealers
Spends

\$800M

In local advertising in All Markets
Online Gets 23% or \$184.2M

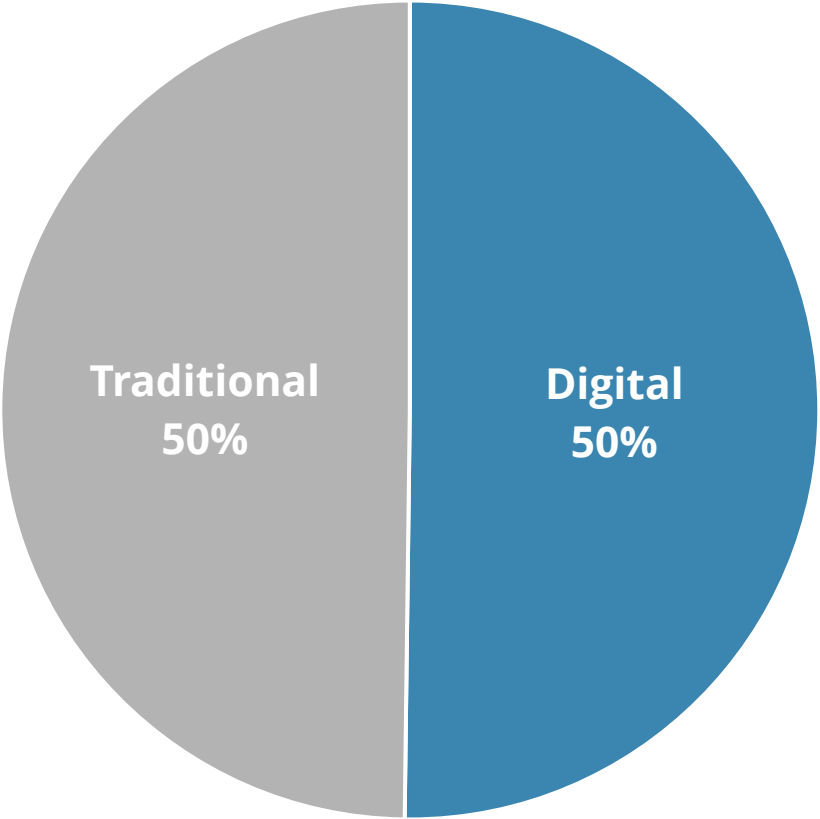


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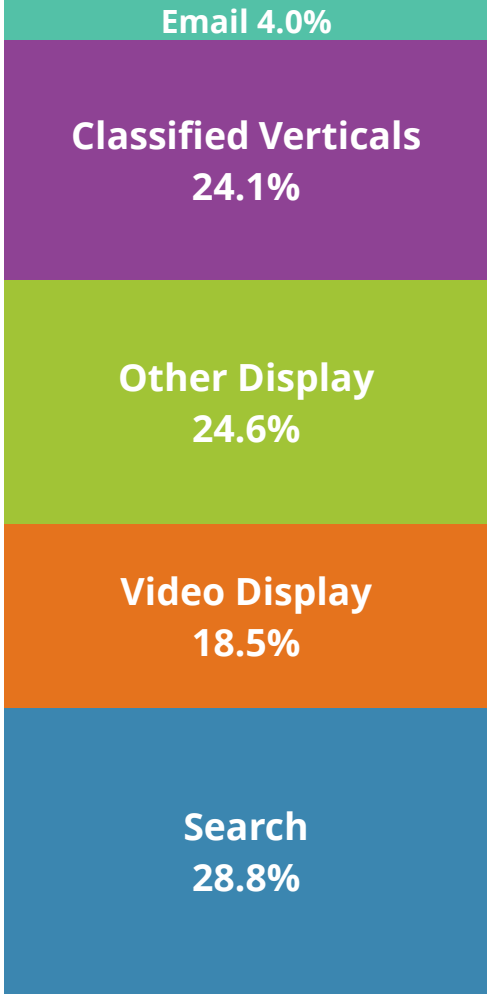
Source: BIA ADVantage, 2021 U.S. Ad Forecast

Other Motor Vehicle Dealers: Share of Traditional & Digital

\$800M in 2021



\$401.9M in Digital Ad Spend in 2021



BIA ADVantage, 2021 U.S. Ad Forecast

2021 Market Trends



- **RV shipments** will likely reach 507,200 units in 2021, 19.5% jump over 2020. This would be a record for the industry.
- In 2020, 35% of RV buyers were **under age 35**.
- Demand for **pop-up campers** surged 30% last year. Younger drivers who are new to RVing like these easily towable models.
- **Motorcycle and scooter sales** grew 11.4% in 2020 as more consumers seek individual mobility. This is expected to continue in 2021 – especially in urban markets.

SOURCE: AdMall® Local Account Intelligence Reports, SalesFuel.com, 2021

Digital Audience for RV/Motorhome Shoppers

- **46.9%** of RV/Motorhome Shoppers have responded to an ad in a smartphone app or text message in the past month.

SOURCE: 11th annual AudienceSCAN® study of U.S. consumer behavior
SalesFuel.com [n= 15,281 adults online]



Selling to RV/Camper/Motorcycle Dealers 2021

- **Ask:** What kind of financing offers are available?
- **Ask:** What kind of inventory is available and what generates the highest profit for you?
- Take advantage of **co-op advertising**/market development funds
- Remind them to piggyback on **limited-time manufacturer promotions**, financing offers, new product drops
- Dealer websites must have **current photography, attention to detail, be optimized for mobile.**

Questions?

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Local Digital Resource – We've Got One for You

Get more on Leisure & Recreation:

Download: **2021 Local Digital Event Series: Vertical Analysis – Data & Insights.**

- This resource contains analysis on the sub-verticals we covered today. Plus get detail on how BIA and SalesFuel can help you.

- **Get the resource in the GoToWebinar panel or here:**

<http://bit.ly/2021DigitalResource-BIA-SalesFuel>

DATA & INSIGHTS

VERTICAL ANALYSIS

TRADITIONAL & DIGITAL AD SPEND

Thank you for attending BIA's and SalesFuel's **2021 Local Digital Event Series.**

This resource is a quick reference for important data and analytics around the verticals being covered in this local digital event series.

You'll also learn how you can get more local vertical data from BIA ADVantage and SalesFuel AdMail to support your sales initiatives.

Questions? Email us at info@bia.com and we will have the appropriate person contact you.

2021 Local Digital Event Series

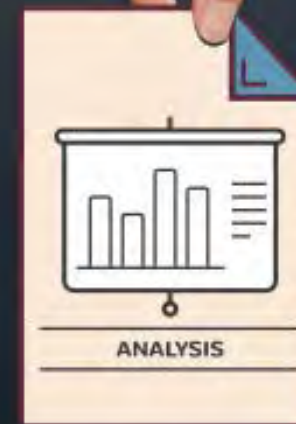
Join us every 4th Tuesday of each month for a comprehensive drill down into verticals that will offer opportunity to local sellers in 2021.

Upcoming Schedule

- April 27 - OTT
- May 24 - Lawyers and Accounting Services
- June 22 - Real Estate

Register here: <http://bit.ly/2021DigitalSeries>

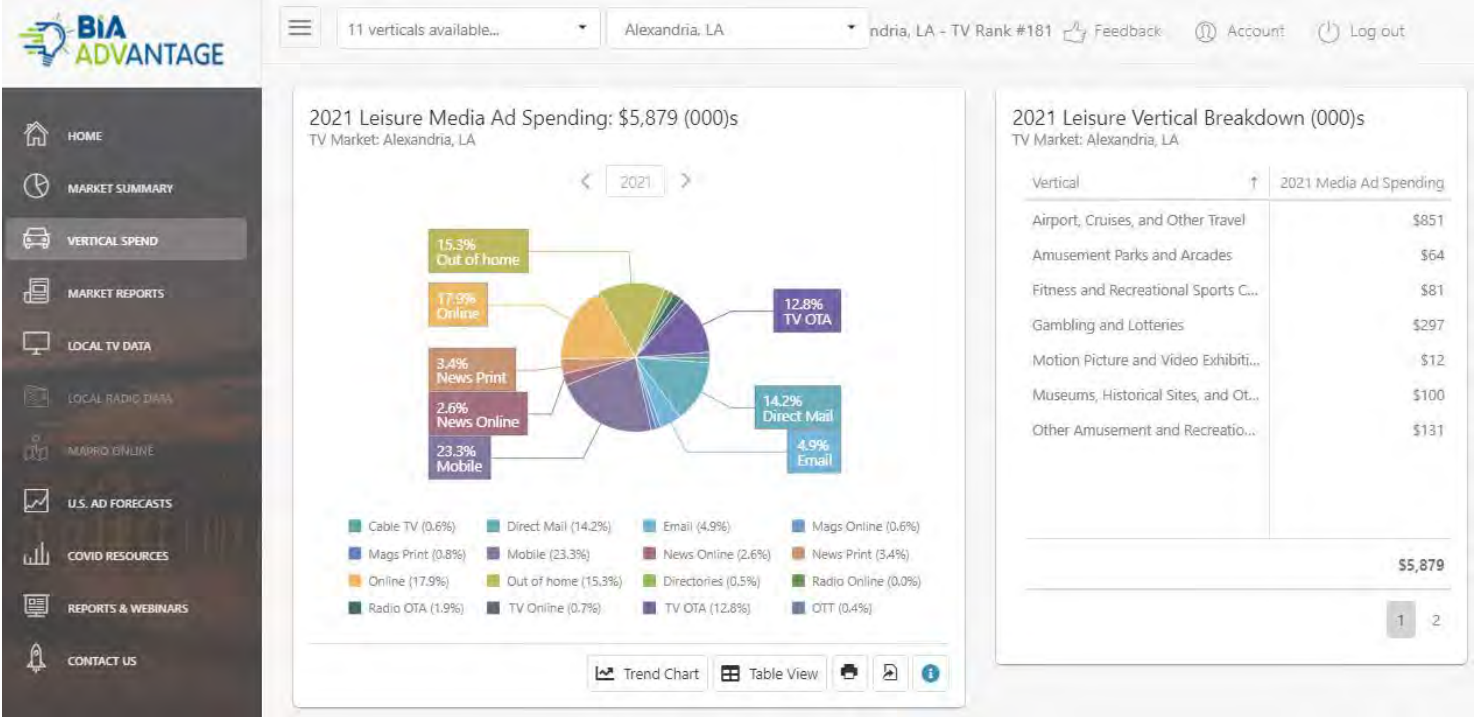
Email webinars@bia.com to get on the invitation list.



BIA ADVantage Explains the Local Ad Marketplace for 95 Verticals

Get deep vertical analysis in BIA ADVantage.
Available for all local TV and local Radio markets.

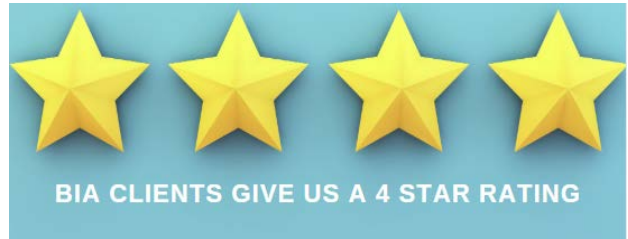
How a market can examine Leisure Vertical in BIA ADVantage:



Request demo today: advantage@bia.com.



Realize Local Advertising with BIA ADVantage
Learn more here: <http://bit.ly/BIA-ADVantage>
Clients' login here: <https://advantage.bia.com/advantage@bia.com>
Demo request: advantage@bia.com



BIA & SalesFuel:
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Digital Event
Series**

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4TH TUESDAY OF EVERY MONTH

APRIL 27, 2021

Over-the-Top (OTT)

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SalesFuel® SALES MANAGER TRAINING

Now is the time to upskill your sales managers

0% complete

Search by lesson title

- Introduction 0/3
- Module 1: Making the Choice to Lead 0/7
- Module 2: Take Control of Your Time and Priorities 0/9
- Module 3: Increase Accountability for Excellence 0/7
- Module 4: Hire the Best, Avoid the Worst 0/6
- Module 5: Coaching for Impact and Sales Growth 0/8
- Module 6: Motivate and Energize Your Team 0/6
- Module 7: Make it Happen 0/4
- Module 8: Managing and Leading a Remote Team 0/2
- Lesson 8.1: Working effectively with remote salespeople 0/12:14M
- Module 8 Quiz 0/2: 7 QUESTIONS

Lesson 8.1: Working effectively with remote salespeople

Kevin F. Davis
President, TopLine Leadership

Kevin talks about the challenges and solutions for leading remote teams.

COMPLETE & CONTINUE →

0% complete

Search by lesson title

- Introduction 0/3
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- Module 5: Coaching for Impact and Sales Growth 0/8
- Module 6: Motivate and Energize Your Team 0/6
- Module 6 Downloads: Activities and Toolkit 0/0: 30M:00S
- Lesson 6.1: Motivating your team to perform 0/1: 10:00:18:15M
- Lesson 6.2: Strategies for handling attitude problems 0/1: 10:00:11:15M
- Lesson 6.3: Resolving issues with troubled talent 0/1: 10:00:11:15M
- Lesson 6.4: Confronting problem performers 0/1: 10:00:12:15M
- Module 6 Quiz 0/2: 7 QUESTIONS

Module 6 Quiz

QUESTION 1 OF 7

Which of the following is NOT an effective "money goal"?

Choose only ONE best answer.

- A Downpayment for a new house
- B Sell \$100,000 of new business
- C Buy an anniversary present for a spouse or partner
- D Pay off credit card debt

COMPLETE

0% complete

Search by lesson title

- Introduction 0/3
- Module 1: Making the Choice to Lead 0/7
- Module 1 Activity Instructions 0/0: 30M:00S
- Lesson 1.1: Commit to the mindset of great leadership 0/1: 10:00:11:15M
- Lesson 1.2: The mental toughness of a leader 0/1: 10:00:11:15M
- Lesson 1.3: Two high-value strategies for team development 0/1: 10:00:11:15M
- Lesson 1.4: The heart of developmental coaching 0/1: 10:00:11:15M
- Lesson 1.5: Insights on a Leadership Mindset 0/1: 10:00:11:15M
- Module 1 quiz 0/2: 7 QUESTIONS
- Module 2: Take Control of Your Time and Priorities 0/9

Lesson 1.2: The mental toughness of a leader

Lesson 1.2

The mental toughness of a leader

This lesson explores the ways in which two sales instincts can harm your effectiveness as a sales manager when it comes to making tough decisions.

After watching the video, please Activity #1.2 on page 4 in the Module 1 Activity Instructions.

COMPLETE & CONTINUE →

The online sales management training course every sales manager needs to immediately increase effectiveness and drive sales growth

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Avoid Toxic Troublemakers



SalesFuel.com/HIRE



Thank You for attending.

Questions and Comments:



Celine Matthiessen

VP Insights & Analysis

cmatthiessen@bia.com



Audrey Strong

VP Communications, SalesFuel

astrong@salesfuel.com

Media Definitions

MEDIA	DESCRIPTION
Direct Mail	All revenue spent by national and local advertisers in promoting their products/services through mailings and catalogs.
Newspapers	All revenue generated by local daily and weekly newspapers from national and local advertisers. Includes all online advertising revenue generated by these local newspapers.
Cable Television	All revenue generated by local cable systems for sale of time to either national or local advertisers on all their aired networks. Does not include any advertising sold by national cable networks.
Email	All revenue spent by national and local advertisers in email solicitation.
Directories	All revenue generated by local directory companies for their digital/online listing services for their print listing services. Also includes revenue from other digital products sold by directory companies including services related to websites, video, SEM and mobile ad networks.
Over-the-Top (OTT)	All locally targeted advertising revenue sold on streaming video that is delivered to TV sets via Internet connections.
Magazines	All revenue generated by local/regional magazines from either national or local advertisers. Does not include any advertising generated by magazines with a national subscriber base.

Media Definitions

MEDIA	DESCRIPTION
Mobile	All revenue generated from advertising on mobile devices. This includes search, display, mobile video, messaging and native social ads.
Online	All revenue generated by online companies selling locally targeted advertising. These advertisements could be sold by local pure-play online companies or national companies offering geo-targeted advertising. Includes display, search and classified/vertical advertising.
Out-of-Home (OOH)	All revenue generated from sale of advertising in locations outside homes. Includes traditional billboards, digital billboards, digital signage, taxicabs and digital cinema.
Radio	All revenue generated by local radio stations for sale of time to either national or local advertisers. Does not include any advertising sold by national radio networks.
Television	All revenue generated by local television stations for sale of time to either national or local advertisers. Does not include any advertising sold by over-the-air national networks or any retransmission consent revenue generated by these local television stations.
Social	Money spent on ad formats across social networks. Now predominantly consisting of native advertising formats that serve as an alternative to display and can generate higher engagement and command premium rates.
Video	Local video advertising includes all advertising revenue generated by video advertising shown by local over-the-air television stations, local cable systems, mobile devices, online sites and out-of-home displays.