



Winning Local Media Series

January 25, 2022 at 1:00 pm EST

SalesFuel[®]

BIA | ADVISORY
SERVICES

Welcome! Thank You for Joining Us

Today's Discussion

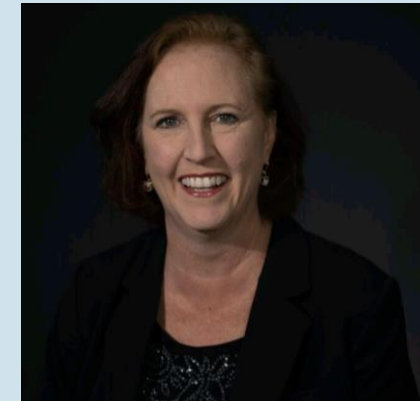
- Expectations for 2022
- Share of Ad Wallet in 2022
- Analysis on Shifts to Digital
- Winning Local Media: Finance, Retail, Leisure, Auto, Political
- **2022 Local Digital Event Series:** 5 webinars planned for this year. Got verticals you want us to cover? Email us at webinars@bia.com.



C. Lee Smith, Founder & CEO SalesFuel



Tom Buono, CEO & Founder BIA Advisory Services



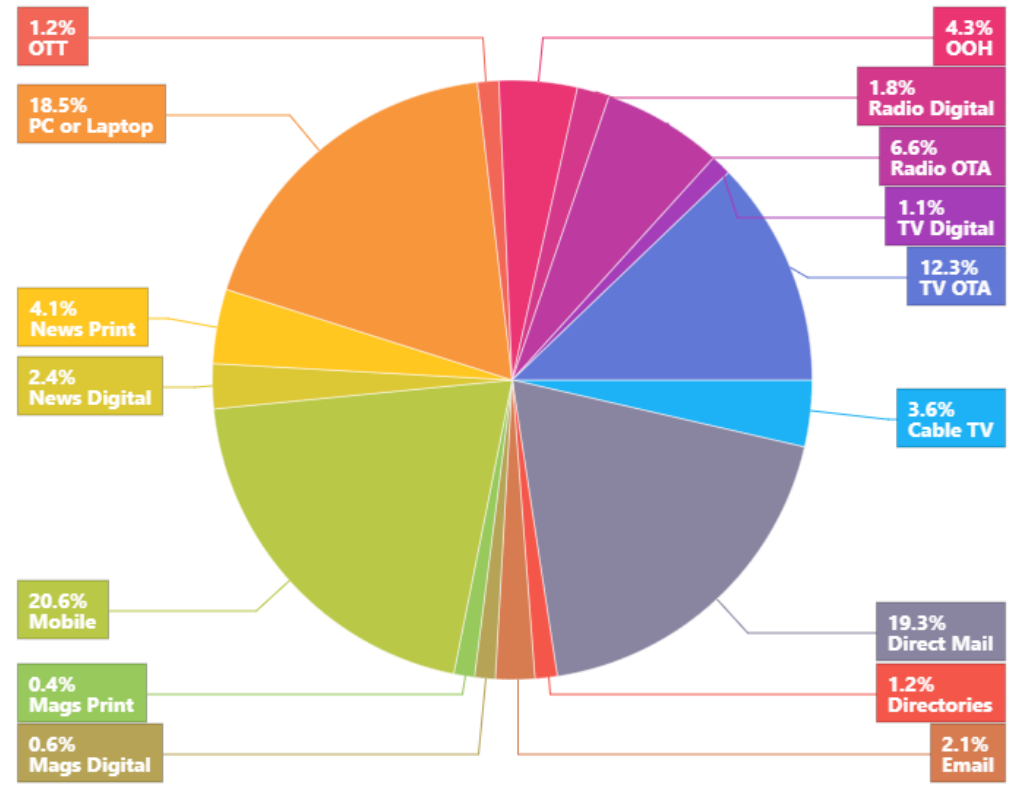
**HOST: Audrey Strong
VP Communications, SalesFuel**

Expectations for 2022

- 2021 was a bounce back year following a devastating 2020.
- After taking all continuing COVID effects into consideration, BIA estimates \$173.3 Billion in total local advertising in 2022.**
- This estimates is an increase of \$17.8 Billion (11.4%) from 2021.



2022 Media Ad Spending: \$173.3 Billion
Custom Market: All TV Markets



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Shift to Digital Advertising Continuing

- Traditional advertising is projected to grow \$8.3 Billion or 10.4% from 2021.
- Digital is projected to grow \$9.5 Billion or 12.5%.
- Digital is closing the gap on Traditional and projected to surpass Traditional in 2023.

	2021	2022
Traditional	\$79,745,062	\$88,047,609
Share of total	51.3%	50.8%
Digital	\$75,722,877	\$85,211,031
Share of total	48.7%	49.2%

Trend Continues: Digital Continues to Grow through 2026

2022 Share of Wallet
 Traditional 50.8%
 Digital 49.2%

Traditional Media 2022 to 2026 CAGR		Digital Media 2022 to 2026 CAGR	
Out of Home	4.0%	TV OTT	14.3%
Direct Mail	2.1%	PC or Laptop	11.8%
TV OTA	0.6%	Magazines Digital	9.8%
Radio OTA	0.0%	Radio Digital	9.6%
Cable TV	-2.9%	Mobile	9.5%
Newspapers Print	-3.0%	TV Digital	7.0%
Magazines Print	-9.8%	Email	6.8%
Print YP	-19.0%	Internet YP	4.6%
Traditional	0.7%	Newspapers Digital	3.6%
		Digital	10.0%

2026 Share of Wallet
 Traditional 42.1%
 Digital 57.9%

CAGR = Compound Annual Growth Rate

Total Local Advertising 5.6% CAGR

PC/Laptop – One of the Fastest Growing Media

- Together, BIA and SalesFuel cover 500+ categories (some overlap).
- **PC/Laptop is projected to have a CAGR* of 11.8% through 2026. Behind only TV OTT (CAGR* +14.3%).**

Vertical	PC/Laptop 2022-2026 CAGR
Automotive	18.0%
Leisure	15.6%
Retail	13.0%
Financial/Insurance	11.6%
Political	-0.2%

PC/Laptop: All revenues generated by online companies selling locally targeted advertisements to be displayed on a PC/laptop. These advertisements could be sold by local pure-play online companies, or national companies selling geo-targeted advertising. Includes search, display and classified/ vertical advertising. Search includes dollars spent on online local inquiries with search engine sites.

Today we are going to dive into Verticals with the Highest PC/Laptop CAGR's* and/or verticals with strong local implications in 2022 + Political

- Financial/Insurance (Consumer Lending & Mortgages)
- Retail (Lawn & Garden Equipment & Supply Stores)
- Leisure (Fitness & Recreational Sports Centers)
- Automotive (Tier 3 – New)
- Political

Source: BIA U.S. Local Advertising Forecast 2022, Issued Dec. 2021

*CAGR =
Compound Annual
Growth Rate

Vertical Analysis

Financial/Insurance Vertical: Consumer Lending & Mortgages

Financial/Insurance 2022 Alerts

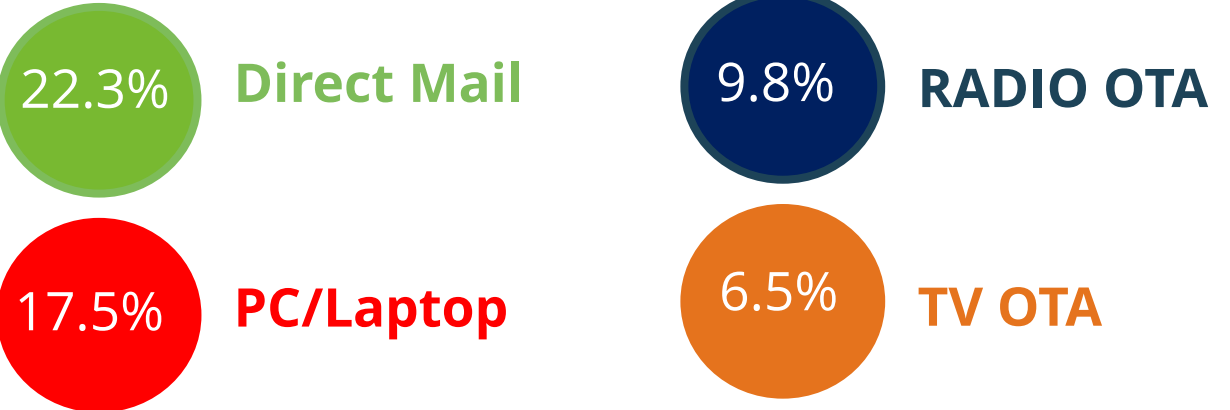
In 2022
Financial/Insurance
Vertical Predicted to Spend

\$24.7B

\$13.1B will go to Digital Advertising

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

Share of Wallet Snippets



Financial/Insurance vertical includes:

- Auto & Direct Property Insurance
- Commercial Banking
- Consumer Lending & Mortgages
- Credit Cards
- Direct Health and Medical Insurance Carriers
- Direct Life Insurance Carriers
- Insurance Agencies and Brokerages
- Investment & Retirement Advice
- Saving/Credit Institutions



Sub-Vertical: Consumer Lending & Mortgages

Yearly Spend and Share of Wallet

Consumer Lending & Mortgages Spend

\$3.0B

In local advertising in All TV Markets.

Source: BIA ADVantage and U.S. Local Advertising Forecast 2022, *Issued Dec. 2021*

■ Top 3 Media Channels:

- Mobile: 28%
- Direct Mail: 21%
- PC/Laptop: 19%



Strategic Idea: Offering mobile apps and financial management tools could entice new business, especially Millennials.

Industry Trends+Forecasts: Consumer Mortgages

Tactical Takeaways for media sales professionals

- Fed is expected to increase interest rates in 2022.
- Major opportunity to target millennials while rates are low. Will make up **32%** of market by 2025. Most likely to buy townhouses and pre-owned houses.
- Refi applications were lower in 2021, but still make up **60%** of the mortgage market.
- Growth in reverse mortgages expected to continue with older demographics.



SOURCES: AdMall.com, SalesFuel analysts, NAR, CNBC, Wall Street Journal, and BankRate.com

Consumer Trends: Mortgage Refinancing Clients

- **4.7%** of consumers plan to buy a large or smaller home in the coming year.
- **Mortgage Refinancing Clients** are **26% less likely** to go past the first page of search results (**24%** of audience in 2021).
- They are more than **2x** as likely to read a blog every day.
- **48%** of refi clients have taken action after seeing an ad on TV (OTA or cable) in the past 30 days.

SOURCE: 12th annual AudienceSCAN® study of U.S. consumer behavior [n= 18,900 adults online]



Media Sales Tactics: Mortgage Companies

Tactical Takeaways for media sales professionals

- **Local brokers need to improve their digital customer experience** as consumers are increasingly finding their lenders online.
- **Local brokers need to advertise aggressively** to compete with credit unions, online lenders and alternative financing options.
- **OTT and social media** generate high response with young, first-time home buyers.
- **TV OTA and print media** generate high response with reverse mortgage candidates.
- Use **AdMall's Local Market Housing data** for lender, customer insight.

Questions on Financial/Insurance?

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



Vertical Analysis

Retail Vertical:

Lawn & Garden Equipment and Supply Stores

Retail Vertical 2022 Alerts

In 2022 Retail Vertical Predicted to Spend

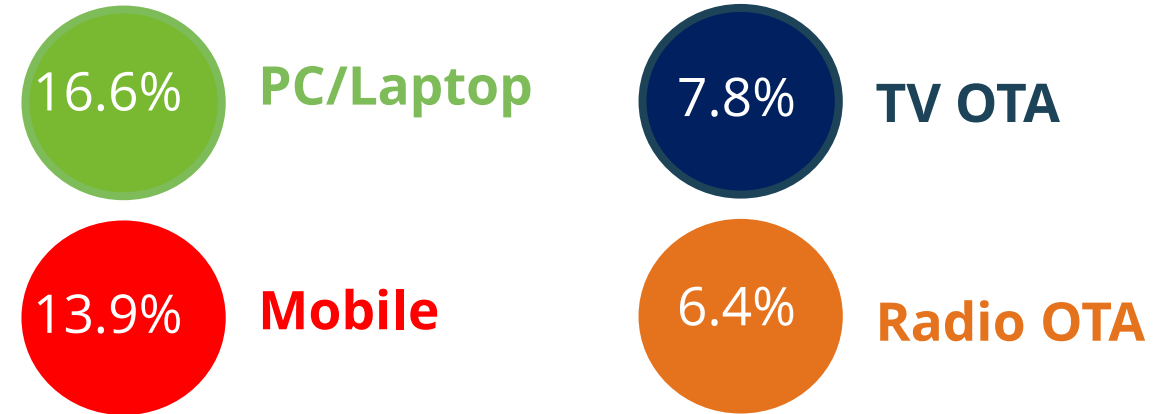
\$24.4B

\$9.5B will go to Digital Advertising

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



Share of Wallet Snippets



Retail vertical includes:

- All Other General Merchandise Stores
- Book Stores
- Clothing Stores
- Department Stores
- Discount Department Stores
- Electronic Stores
- Floor Covering Stores
- Furniture Stores
- Gift, Novelty, and Souvenir Stores
- Hardware Stores
- Hobby, Toy, and Game Stores
- Home Centers
- Household Appliance Stores
- Jewelry, Luggage, and Leather Goods Stores
- Lawn and Garden Equipment and Supplies Stores
- Mattress and Sleep Centers
- Office Supplies and Stationery Stores
- Other Home Furnishings Stores
- Paint and Wallpaper Stores
- Pet Supplies Stores
- Shoe Stores
- Sporting Goods Stores
- Warehouse Clubs and Supercenters

Sub-Vertical: Lawn & Garden Equipment and Supply Stores

Yearly Spend and Share of Wallet

Lawn and Garden Equipment and Supplies Stores Spend

\$1.1B

In local advertising in All TV Markets.

Source: BIA ADVantage and U.S. Local Advertising Forecast 2022, Issued Dec. 2021

■ Top 3 Media Channels:

- Direct Mail: 39%
- PC/Laptop: 17%
- Mobile: 14%



Strategic Idea: Help your lawn & garden equipment and supplies stores stand out from the crowd of national brands by promoting their local origins.

Industry Trends+Forecasts: Outdoor Power Equipment

Tactical Takeaways for media sales professionals

- Inventory and supply chain challenges means owners want their old equipment repaired and serviced.
- The stand-on mower category is expected to be a sales booster in 2022.
- **CA** has banned gas-powered mowers and leaf blowers. **NY** and **IL** are considering.
- Electric expected to be up to **50%** of the walk-behind rotary mower market by 2026.
- May, June and July are the peak sales months, but ads often start in **March**.



SOURCES: AdMall.com, SalesFuel analysts, OEM Off-Highway, OutdoorPowerEquipment.com,

Consumer Trends: Outdoor Power Equipment Shoppers

- **9.7%** of consumers plan to buy outdoor power equipment in the coming year.
- **17%** of OPE Shoppers plan to attend a **home or garden show**.
- **OPE Shoppers 83% more likely** after seeing **out-of-home** advertising in the past 30 days.
- **69%** have taken action after seeing a **direct-response** ad in their mailbox during the past 12 months.

SOURCE: 12th annual AudienceSCAN® study of U.S. consumer behavior [n= 18,900 adults online]



Media Sales Tactics: OPE Dealers

Tactical Takeaways for media sales professionals

- **Advertise service/repair, quality of merchandise** to help local dealers compete with big-box home improvement centers.
- **Have strong working knowledge of available co-op advertising programs** as **51%** of OPE dealers spend less than \$500 out-of-pocket/month on marketing.
- **Keep an eye on promotional financing offers, new products** that need to be advertised locally.
- ***Q: What % of your sales come from commercial accounts?***
- Use **AdMall's Co-op Advertising database** and **Limited-Time Opportunities** for ongoing opportunities.

Questions on Retail?

Please enter your question into the control panel.

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Vertical Analysis

Leisure Vertical:

Fitness and Recreational Sports Centers

Leisure Vertical 2022 Alerts

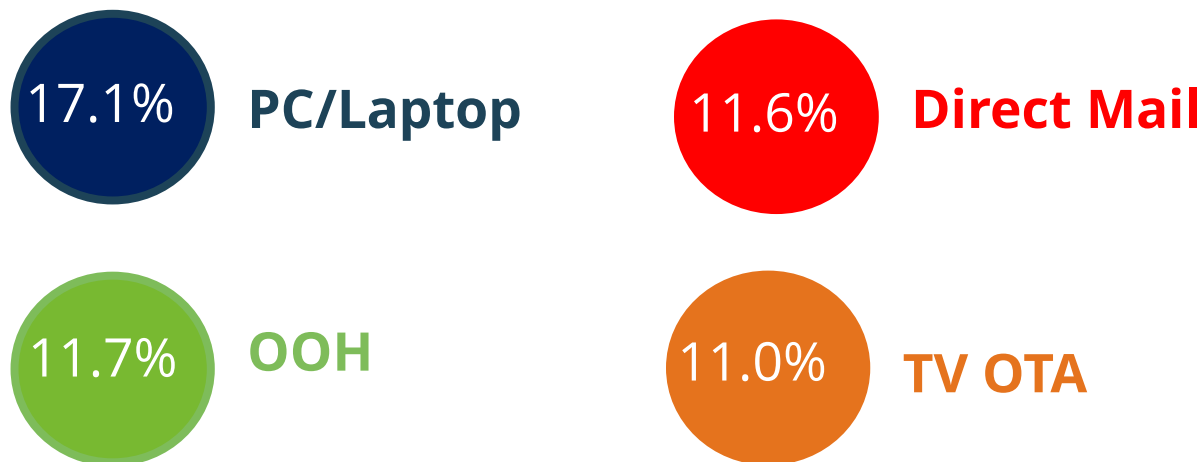
In 2022
Leisure
Vertical Spends

\$14.1B

\$7.3B will go to Digital Advertising

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

Share of Wallet Snippets



Leisure vertical includes:

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

Sub-Vertical: Fitness and Recreational Sports Centers

Yearly Spend and Share of Wallet

Fitness and Recreational Sports Centers Spend

\$1.1B

In local advertising in All TV Markets.

■ Top 3 Media Channels:

- Mobile: 27%
- PC/Laptop: 19%
- OOH: 13%



Strategic Idea: Help them extend their advertising with franchise support. TV is the top medium for recall among fitness enthusiasts - those that go 3-5 times a week to a gym or health club.

Source: BIA ADVantage and U.S. Local Advertising Forecast 2022, Issued Dec. 2021

Industry Trends+Forecasts: Fitness Clubs

Tactical Takeaways for media sales professionals

- **Nearly 40%** of American Adults never exercise. **MS** and **TN** are the least active. **MN** and **CA** are the most active.
- **Franchise owners** may have several locations in one market, and they may own more than one brand which means they could have a large ad budget.
- Online fitness apps are a major threat to budget clubs (under \$25/month).
- Many Americans are expected to return to clubs and classes from their at-home equip.



SOURCES: AdMall.com, SalesFuel analysts, IHRSA, Gymless.com, ClubIndustry.com,

Consumer Trends: Gym/Health Club Switchers

- **9.2%** of adults **plan to switch to a different gym/health club** in the next year.
- **21%** of potential switchers go to the gym/classes twice a week.
- They are **69% more likely** to need at least 15 recent online reviews to influence their decision.

SOURCE: 12th annual AudienceSCAN® study of U.S. consumer behavior [n= 18,900 adults online]



Media Sales Tactics: Fitness Clubs

Tactical Takeaways for media sales professionals

- **Target Adults 45 and under** as they make up **80%** of specialty fitness club members in the U.S.
- **Promote the advantages of in-club classes** vs at-home classes.
- **Include advertising on mobile phones and social media** as **50%** potential club switchers have taken action after seeing ads there in the past 30 days.
- **Recommend reputation management services** to improve quantity, quality of online reviews.
- *Q: Are free first-time classes or drop-in classes available?*
- Use **AdMall's Local Healthcare Needs** for more customer insight.

Questions on Leisure?

Please enter your question into the control panel.

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Vertical Analysis

Auto Vertical: Tier 3 – New Car Dealers

Automotive Vertical 2022 Alert

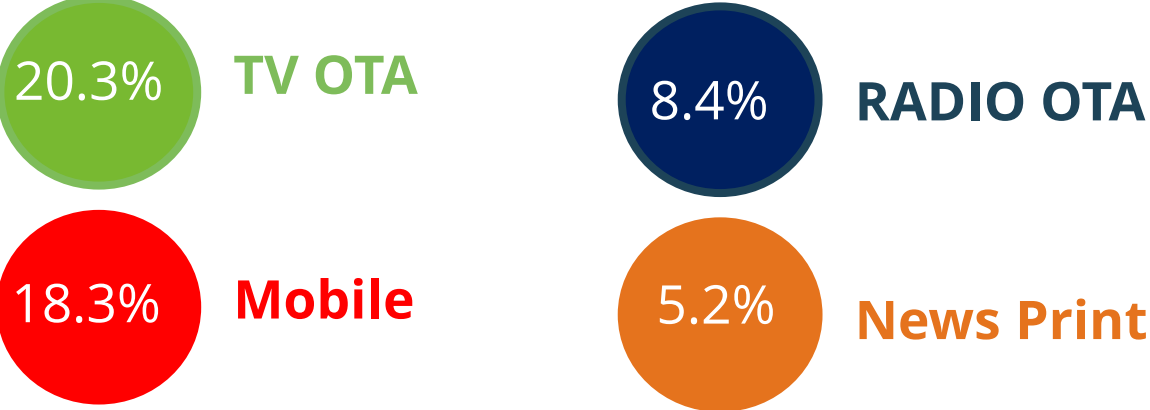
In 2022
Automotive
Vertical Spends

\$13.9B

\$7.7B in Digital Ad Spend for 2022

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

Share of Wallet Snippets



Automotive vertical includes:
Other Motor Vehicle Dealers
Tier 1 - Automotive Manufacturers,
Tier 2 - Automobile Dealers Association
Tier 3 - New Car Dealers
Tier 3 - Used Car Dealers, Tires
Automotive Parts and Accessories Stores,
Automotive Repair Services
Gas Stations & Petroleum

Sub-Vertical: Tier 3 – New Car Dealers

Yearly Spend and Share of Wallet

Tier 3 - New Car Dealers

Spend

\$3.7B

In local advertising in All TV Markets.

Source: BIA ADVantage and U.S. Local Advertising Forecast 2022, Issued Dec. 2021

■ Top 3 Media Channels:

- PC/Laptop: 27%
- Mobile: 19%
- TV OTA: 16%



Strategic Idea: 71% of vehicle shoppers use mobile during the purchase process. 71% of consumers would consider watching a video on a mobile device to explore vehicle models and features.

Industry Trends+Forecasts: Auto Dealerships

Tactical Takeaways for media sales professionals

- There will be fewer manufacturer incentives in 2022 due to tight supply. Projected average of **\$1,598 per vehicle** in December 2021, down from \$2,291 from a year ago.
- Some brands' co-op plans now cover the advertising of certified pre-owned vehicles: Audi, BMW, GM, Mini, Subaru, Ford
- Improved inventory expected in **Second Half of 2022**. Sales of **16m** vehicles expected in 2022, **up 1m** from 2021.
- The driveway is the dealership. Online buying apps are becoming more significant.



SOURCES: AdMall.com, SalesFuel analysts, The Detroit Bureau, and Cox Automotive

Audience Trends: Auto Shoppers

- Up to **20%** of consumers plan to **purchase a new car or truck this year**
- **11.5%** of new vehicle shoppers are now including **electric cars** in their purchase consideration
- **34%** of all vehicle owners prefer dealership service centers to general repair shops.

SOURCE: 12th annual AudienceSCAN® study of U.S. consumer behavior [n= 18,900 adults online]



Media Sales Tactics: Auto Dealerships

Tactical Takeaways for media sales professionals

- **Dealers should be touting their service departments** to generate revenue in the near term.
- **90%** of car shoppers now start their buying process online - **help dealerships to remind buyers of value they provide.**
- Reputation management is critical for dealers AND their salespeople.
- **Combine digital with traditional advertising** – which still influences purchase decisions as much as digital.
- **Use AdMall's Automotive Brand reports for dealer, customer insight.**

Questions on Automotive?

Please enter your question into the control panel.

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Vertical Analysis

Political Vertical: Big Expectations!

Political Sub-Category Alert

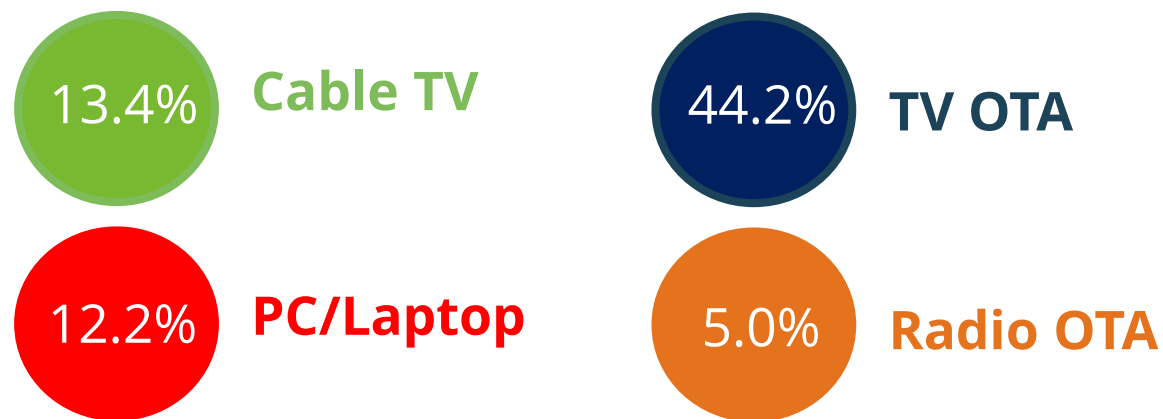
In 2022
Political
Sub-Vertical Spends

\$8.4B

\$1.9B in Digital Ad Spend for 2022

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

Share of Wallet Snippets



Political Moderates in the U.S.

- **35%** of U.S. adults are ideological moderate (Gallup). **20%** of registered Republicans and **35%** of registered Democrats.
- **30%** vote in every election
- **33%** regularly watch their **local** evening news
- **32% more likely** to rely on traditional media for their news.
- More likely to support these causes than the average adult: education/literacy, health/disease research, the environment.



SOURCE: 12th annual AudienceSCAN® study of U.S. consumer behavior [n= 18,900 adults online]

Questions on Political?

Please enter your question into the control panel.

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Additional Data Available



Local Account Reports

- Mortgage Companies
- Banks, Regional and National
- Banks, Community
- Consumers Lending Services
- Credit Unions
- Health Clubs/Fitness Centers
- Auto Dealers
- Political Organizations
- Outdoor Power Equipment Retailers

Consumer Spending

- Mortgage interest
- Cash contributions to political organizations
- Outdoor equipment
- New cars
- New trucks
- Social, Recreation, Civic Club Membership Fees

Audiences

- Second Home Shoppers
- Mortgage Broker Clients
- First-Time Home Buyers
- Home Buyer (larger or smaller primary home)
- New Car/Truck Shoppers
- Used Car Shoppers
- Luxury Car Shoppers
- First-Car Buyers
- Sports Car Shoppers
- Fitness/Gym Club Members
- Specialty Fitness Club Members
- Potential Gym/Health Club Switchers
- Outdoor Power Equipment Shoppers
- Political Moderates
- Independent Voters

Local Vertical Ad Reports

- Automotive
- Finance
- Retail
- Political
- Vertical Alerts
- **NOTE: Get full list of all sub-verticals covered in BIA's U.S. Local Ad Forecast on the opening slide for each vertical section covered in this presentation.**

Local Vertical Forecasts

- Political 2022
- Online Gambling
- Share of Wallet Comparisons

Strategies

- Vertical Alerts for 96 sub-verticals showing share of wallet across top media channels and local sales strategies

BIA ADVantage Explains the Local Ad Marketplace for 96 Verticals

Get local market data, insights and strategies from BIA ADVantage - the leading advertising intelligence platform.

With BIA ADVantage, clients are successfully

- **Sizing** local market opportunities,
- **Developing** effective sales campaigns,
- **Improving** budgeting and, most importantly,
- **Growing** local revenue.

Request a demo: advantage@bia.com. Mention you attended today's webinar to receive special subscription pricing.

Quick Links

Learn more: <http://bit.ly/BIA-ADVantage>

Client login: <https://advantage.bia.com/>



Over 85% of our clients rate ADVantage "Very" to "Extremely Useful" in daily work and closing ad sales.



NEW!

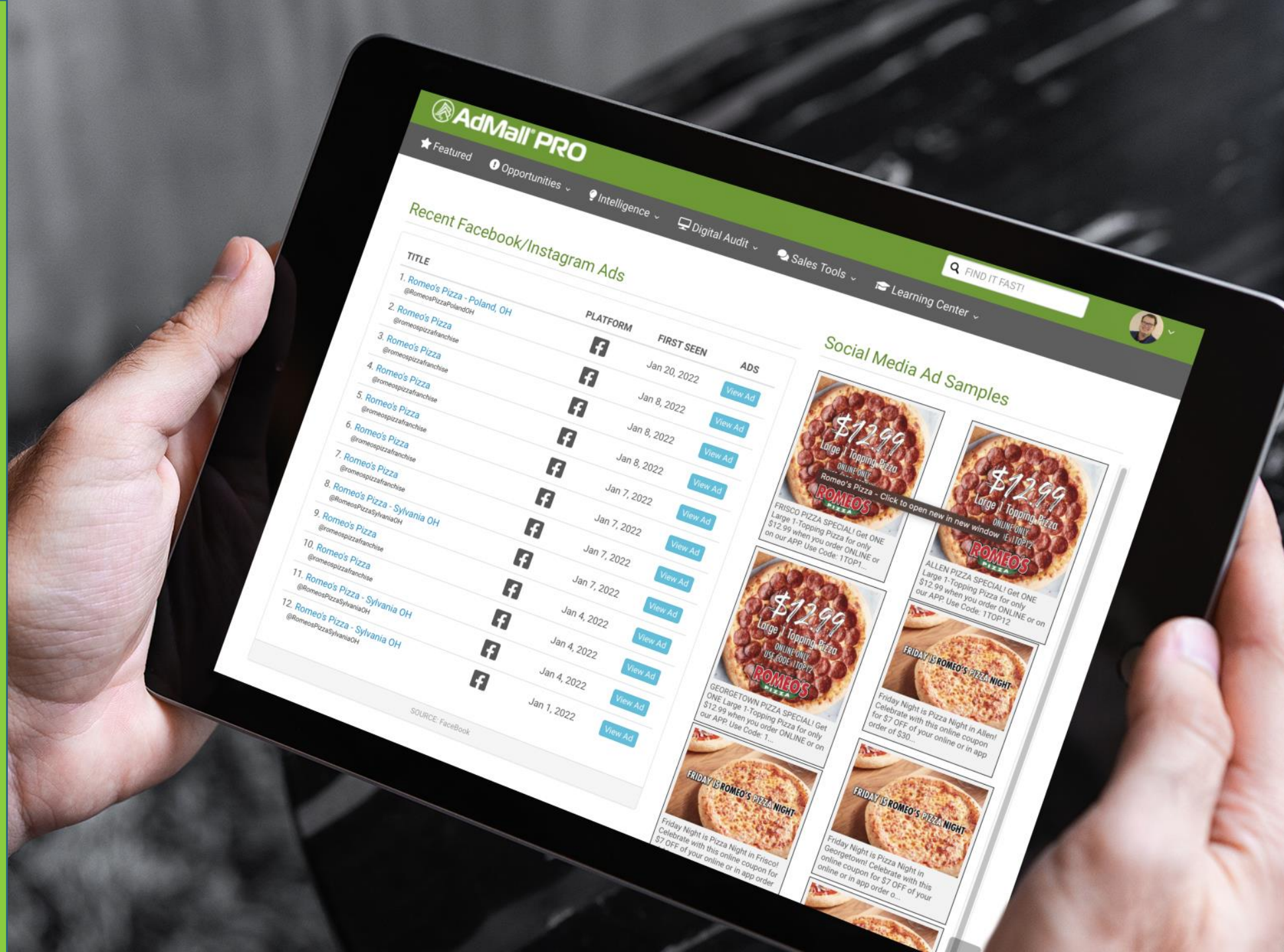
Social media advertising on Facebook and Instagram

Added to AdMall's Digital Audit this month



AdMall[®]

admall.com



AdMall PRO

★ Featured

📌 Opportunities

🔍 Intelligence

📄 Digital Audit

🛠 Sales Tools

🎓 Learning Center

🔍 FIND IT FAST!

Recent Facebook/Instagram Ads

TITLE	PLATFORM	FIRST SEEN	ADS
1. Romeo's Pizza - Poland, OH @RomeosPizzaPolandOH	f	Jan 20, 2022	View Ad
2. Romeo's Pizza @romeospizzafanchise	f	Jan 8, 2022	View Ad
3. Romeo's Pizza @romeospizzafanchise	f	Jan 8, 2022	View Ad
4. Romeo's Pizza @romeospizzafanchise	f	Jan 8, 2022	View Ad
5. Romeo's Pizza @romeospizzafanchise	f	Jan 7, 2022	View Ad
6. Romeo's Pizza @romeospizzafanchise	f	Jan 7, 2022	View Ad
7. Romeo's Pizza @romeospizzafanchise	f	Jan 7, 2022	View Ad
8. Romeo's Pizza - Sylvania OH @RomeosPizzaSylvaniaOH	f	Jan 7, 2022	View Ad
9. Romeo's Pizza @romeospizzafanchise	f	Jan 7, 2022	View Ad
10. Romeo's Pizza @romeospizzafanchise	f	Jan 7, 2022	View Ad
11. Romeo's Pizza - Sylvania OH @RomeosPizzaSylvaniaOH	f	Jan 4, 2022	View Ad
12. Romeo's Pizza - Sylvania OH @RomeosPizzaSylvaniaOH	f	Jan 4, 2022	View Ad
	f	Jan 4, 2022	View Ad
	f	Jan 1, 2022	View Ad

SOURCE: FaceBook

Social Media Ad Samples

FRISCO PIZZA SPECIAL! Get ONE Large 1-Topping Pizza for only \$12.99 when you order ONLINE or on our APP. Use Code: 1TOP1...

ALLEN PIZZA SPECIAL! Get ONE Large 1-Topping Pizza for only \$12.99 when you order ONLINE or on our APP. Use Code: 1TOP12

GEORGETOWN PIZZA SPECIAL! Get ONE Large 1-Topping Pizza for only \$12.99 when you order ONLINE or on our APP. Use Code: 1...

FRIDAY IS ROMEO'S PIZZA NIGHT
Friday Night is Pizza Night in Allen! Celebrate with this online coupon for \$7 OFF of your online or in app order of \$30.

FRIDAY IS ROMEO'S PIZZA NIGHT
Friday Night is Pizza Night in Frisco! Celebrate with this online coupon for \$7 OFF of your online or in app order.

FRIDAY IS ROMEO'S PIZZA NIGHT
Friday Night is Pizza Night in Georgetown! Celebrate with this online coupon for \$7 OFF of your online or in app order o...



Next Webinar

NEW Sales Builder Badges

SPECIAL DATE!

JANUARY 27, 2022

4pm ET / 1pm PT





WORK TRAITS



MOTIVATION



BEHAVIOR



SELLING TRAITS



CRITICAL THINKING



LEADERSHIP TRAITS



**Get Mindset Profiles for
2 Salespeople FREE**



TeamTrait™

HIRE | OPTIMIZE | RETAIN

TeamTrait.com



Questions & Comments:

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Definitions of Traditional Media Platforms

- **Cable Television:** All revenues generated by local cable systems for sale of time to either national or local advertisers on all of their aired networks. Does not include any advertising sold by national cable networks.
- **Direct Mail:** All revenue spent (including postage and production) by direct mail local and direct mail national advertisers in promoting their products/services through printed mailings and catalogs. The average split of national/local is 90/10.
- **Directories:** All revenues generated by local directory companies for their printed and digital/online listings.
- **Magazines Print:** All revenues generated by local market magazines from either national or local advertisers from their print editions. Does not include any advertising generated by magazines with a national subscriber base.
- **News Print (Previously called Newspapers Print) :** All revenues generated by local daily and weekly newspapers from national and local advertisers from their print editions. Does not include any revenue generated from subscriptions.
- **Out-Of-Home (OOH):** All revenues generated from sale of advertising in locations outside of homes. Includes traditional billboards, digital billboards, digital signage, taxi cabs, and digital cinema.
- **Radio Over-the-Air (OTA) :** All revenues generated by local radio stations for sale of time to either national or local advertisers from their over-the-air broadcasts. Does not include any advertising sold by the national radio networks.
- **TV Over-the-Air (OTA) :** All revenues generated by local television stations for sale of time to either national or local advertisers. Does not include any advertising sold by the over-the-air national networks, nor any retransmission consent revenues generated by these local television stations.

Definitions of Digital Media Platforms

- **E-Mail:** All revenues spent by national and local advertisers in e-mail solicitation.
- **Magazines Digital (Previously called Magazines Online):** All revenues generated by local market magazines from either national or local advertisers from their digital activities. Includes the share retained by local magazines after reselling other online platforms (e.g., Google AdWords). Does not include any advertising generated by magazines with a national subscriber base.
- **Mobile:** All revenues generated from advertising on mobile devices and targeted devices are Phones, tablets. This includes in-app advertising as well as mobile web and messaging advertising. Formats include display, search, SMS, video and native social advertising (i.e., BIA Facebook news feed ads).
- **News Digital:** All revenues generated by local daily and weekly newspapers from national and local advertisers from their online editions. Includes the share retained by local newspapers after reselling other online platforms (e.g., Google AdWords). Does not include revenues generated from subscriptions.
- **Over The Top (OTT):** OTT advertising is local targeted advertising included on streaming video delivered to TV sets via Internet connections and includes both IP set top boxes that receive signals from digital video ad servers (and widgets on them) as well as USB and HDMI multimedia devices.

Definitions of Digital Media Platforms

- **PC/Laptop:** All revenues generated by online companies selling locally targeted advertisements to be displayed on a PC/laptop. These advertisements could be sold by local pure-play online companies, or national companies selling geo-targeted advertising. Includes search, display and classified/vertical advertising. Search includes dollars spent on online local inquiries with search engine sites (such as Google, Microsoft, Facebook, Yahoo, Ask, AOL).
- **Radio Digital (Previously called Radio Online):** Radio digital advertising includes local advertising sold by local stations (streaming and website advertisements) and pure play streaming services. Includes the share retained by local radio stations after reselling other online platforms (e.g., Google AdWords)..
- **TV Digital (Previously called Television Online):** TV digital advertising includes local advertising sold by local broadcast stations (owned and operated streaming and website advertisements). Includes the share retained by local television stations after reselling other online platforms and products (Not owned and operated e.g., Google AdWords, targeted display, social media advertising).