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State of Media Sales

— 2021 —

Today's Panelists



C. Lee Smith
Founder/CEO
SalesFuel, Inc.



Rick Ducey
Managing Director
BIA Advisory Services



Denise Gibson
Director of Sales
AdMall

Today's Agenda

The current State of Media Sales
from the perspective of:

1. Revenue
2. Sales Managers
3. Media Sellers

With discussion and your
questions after each segment



State of Media Sales — 2021 —





State of Media Sales — 2021 —



- **11th annual online survey conducted Aug–Sept 2021**
- **394 media sales professionals in the United States**, including...
 - TV (OTA)
 - Cable TV
 - Newspapers+Magazine
 - Direct Response
 - Radio
 - Out of Home
 - Digital Media+Agencies

1

Revenue Perspective



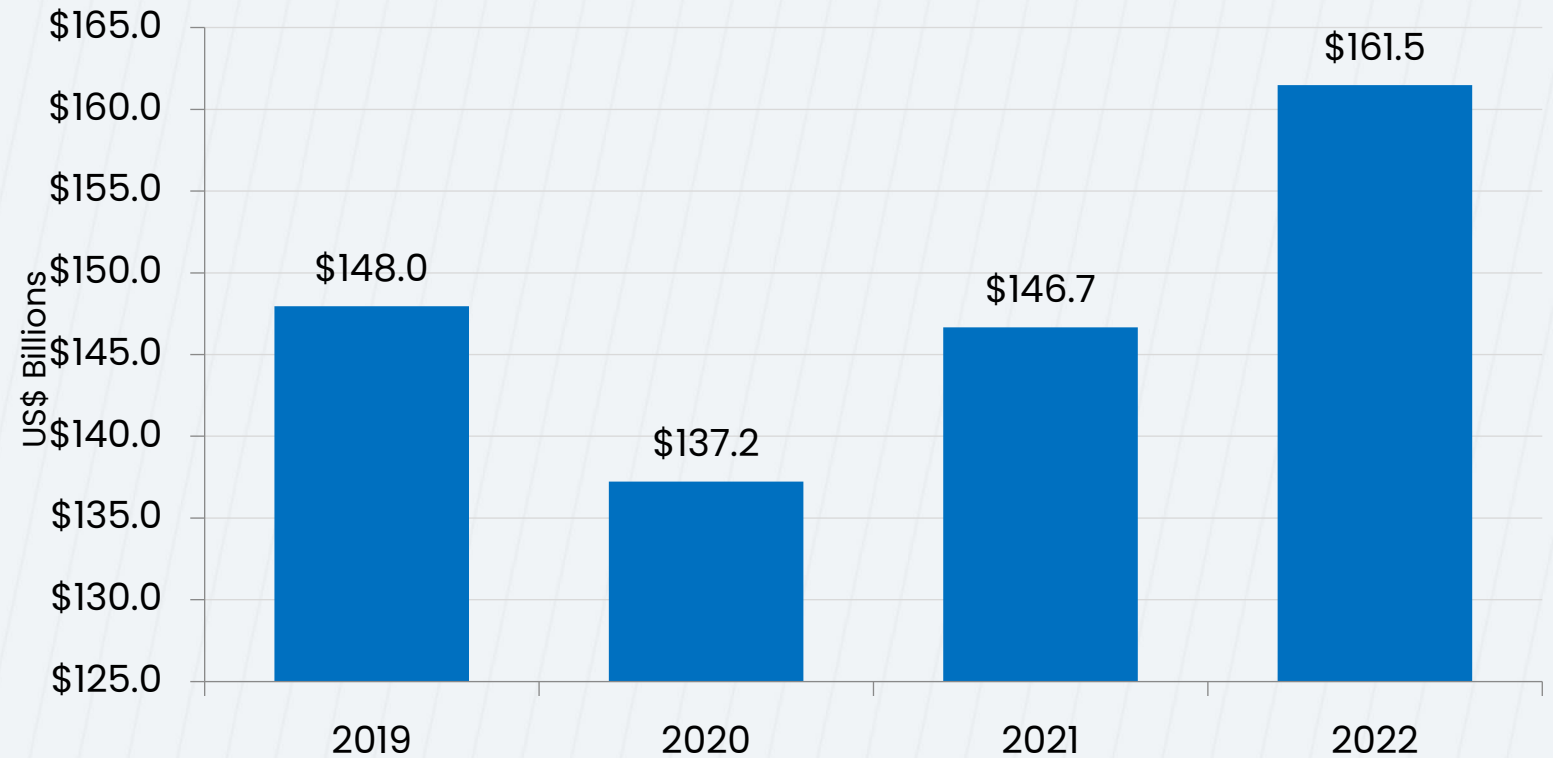
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BIA's Local Advertising Forecast 2019-2022

2021 Spending Indicates Recovery from 2020 COVID Dip

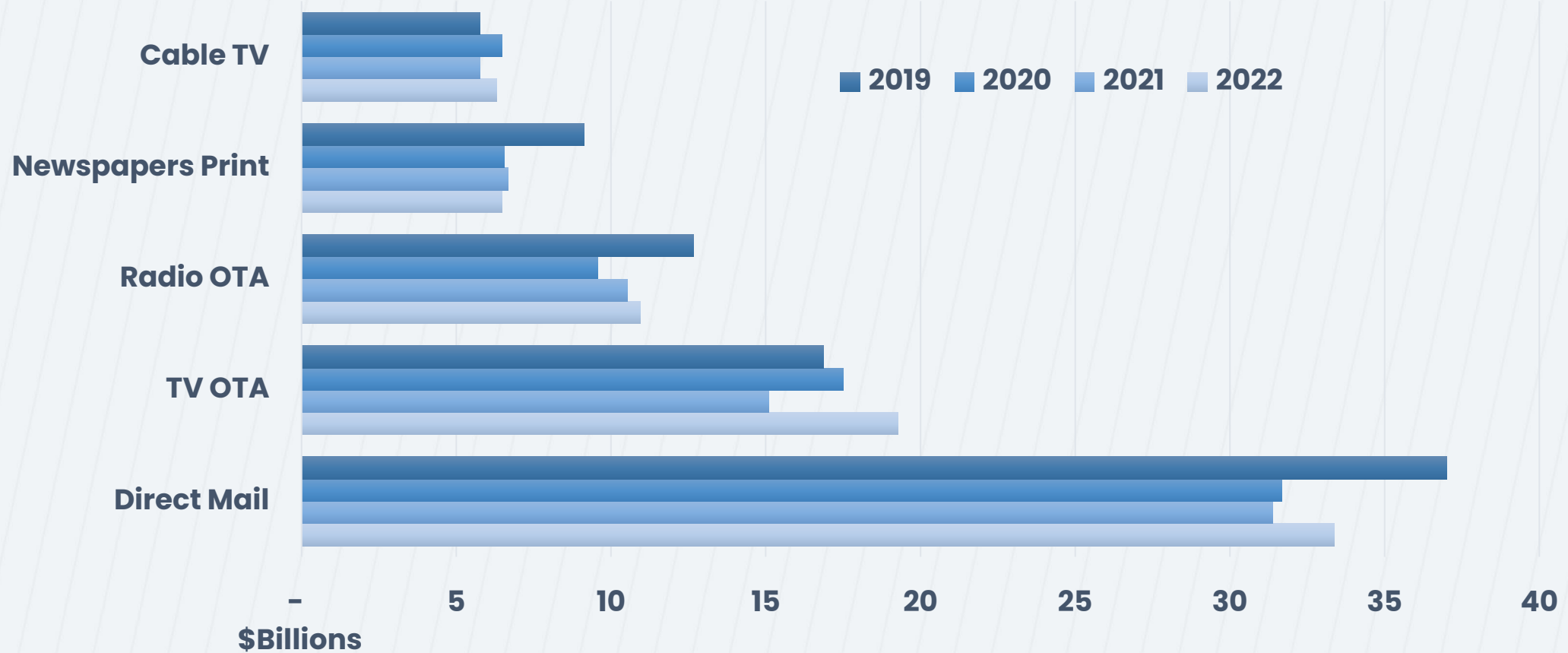


Note: Numbers are rounded.

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

2019–2022 Local Ad Estimates Pre and Post COVID

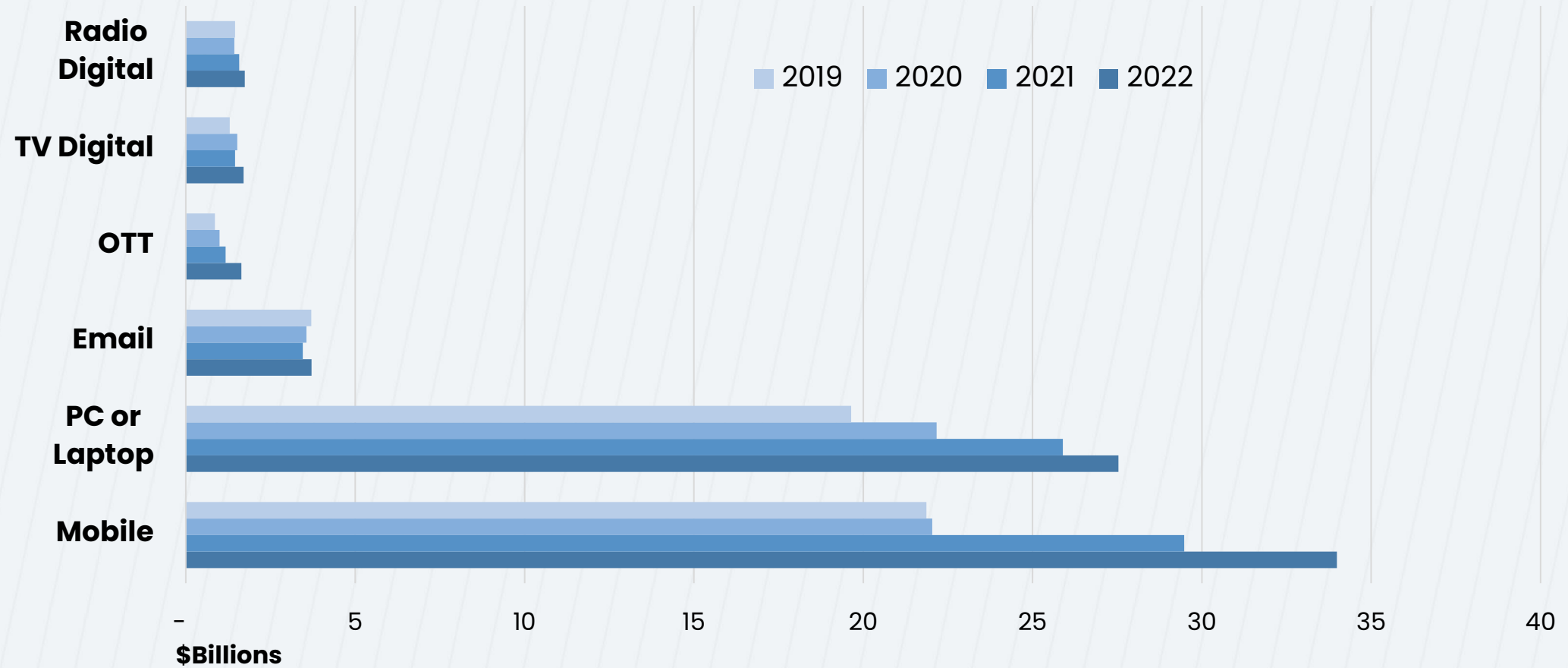
TRADITIONAL MEDIA



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

2019–2022 Local Ad Estimates Pre and Post COVID

DIGITAL MEDIA



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



Specific Verticals Impact:

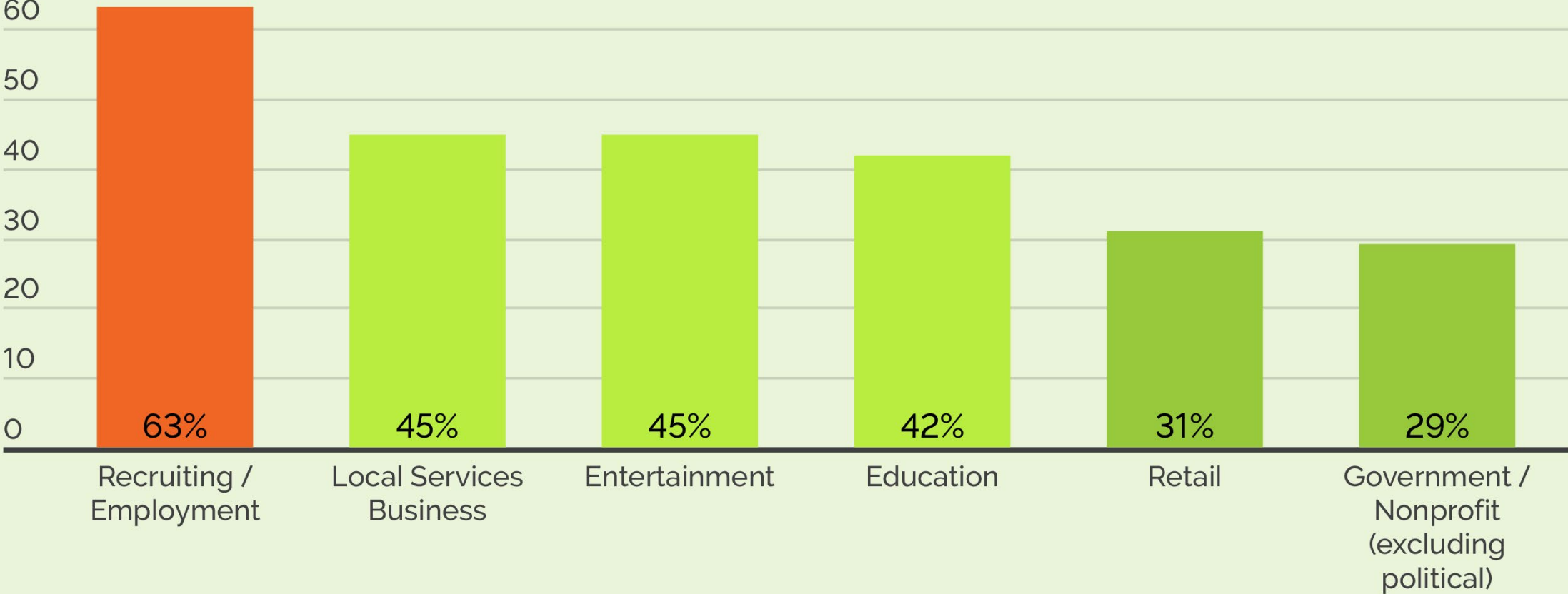
Total Local Advertising Changes

Annual Spend Changes from **2019** Pre-COVID Levels Compared to **2021** Levels

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



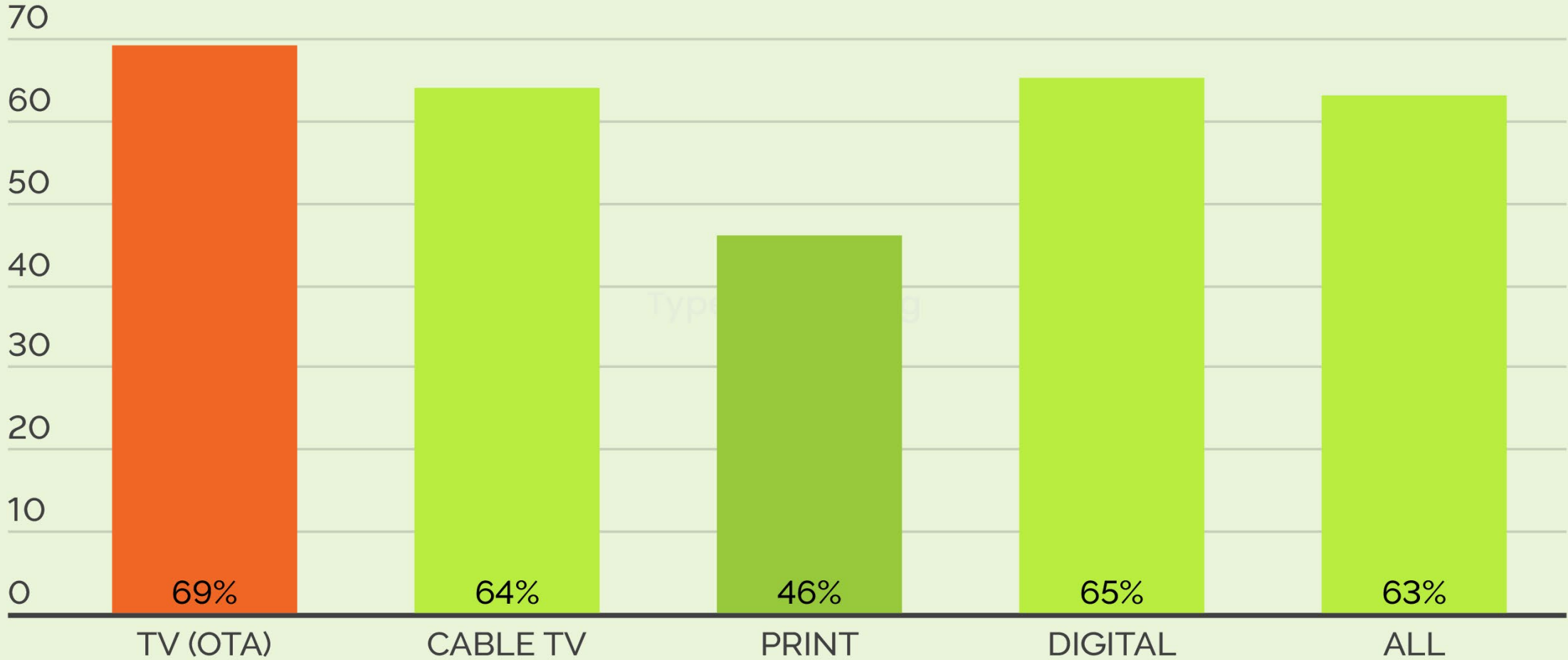
Media Sales Trending Upward But Shortages Present Opportunities and Dangers



Sales Revenue in These Verticals Expected to Finish 2021 Up Significantly (vs 2020)

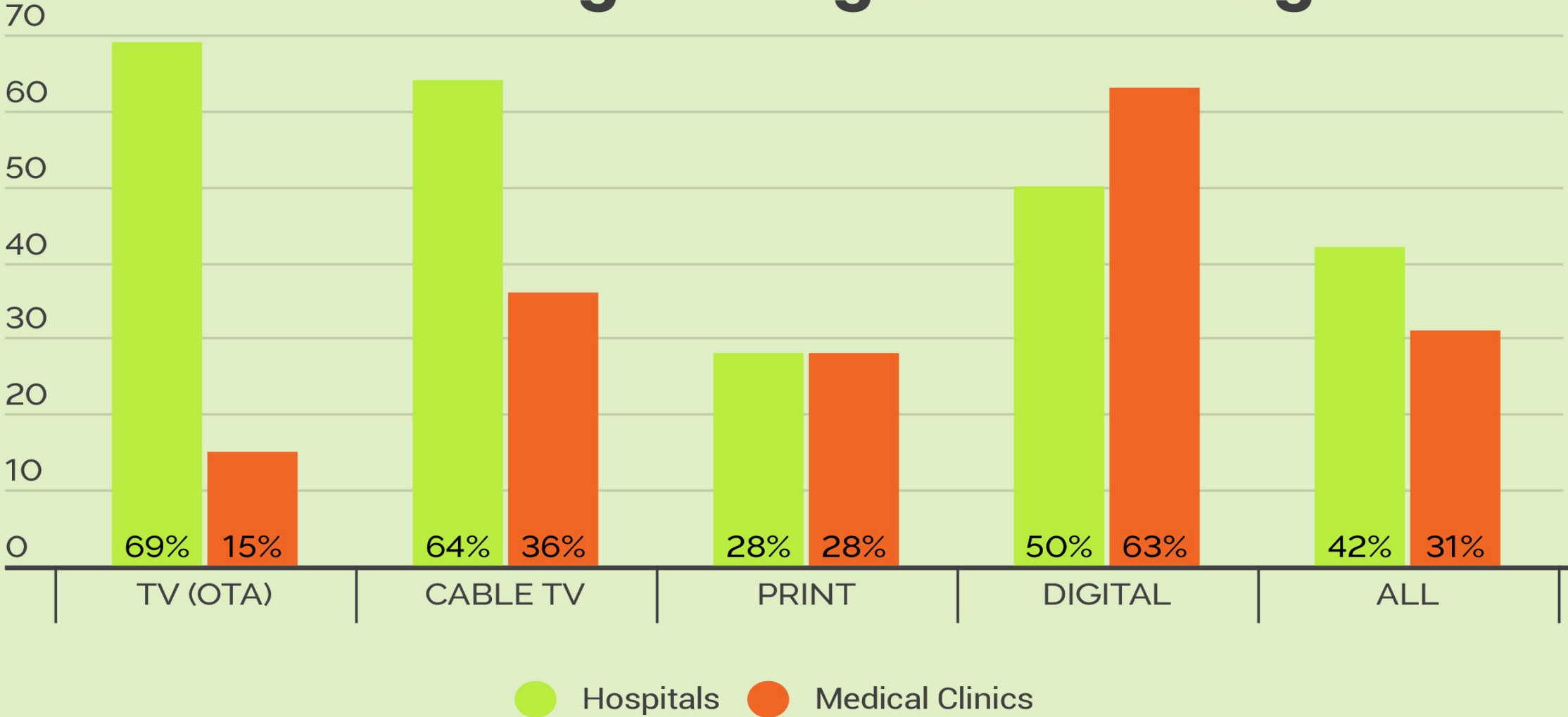
11th State of Media Sales Study, Aug-Sept 2021, AdMall.com and BIA.com

Labor Shortages Have Set Local Recruitment / Employment Advertising on Fire



Media that are Expecting Annual Recruiting / Employment Sales Revenue to Finish 2021 Up Significantly (vs 2020)

Optimism Abounds for Health Care Advertising and Digital Marketing

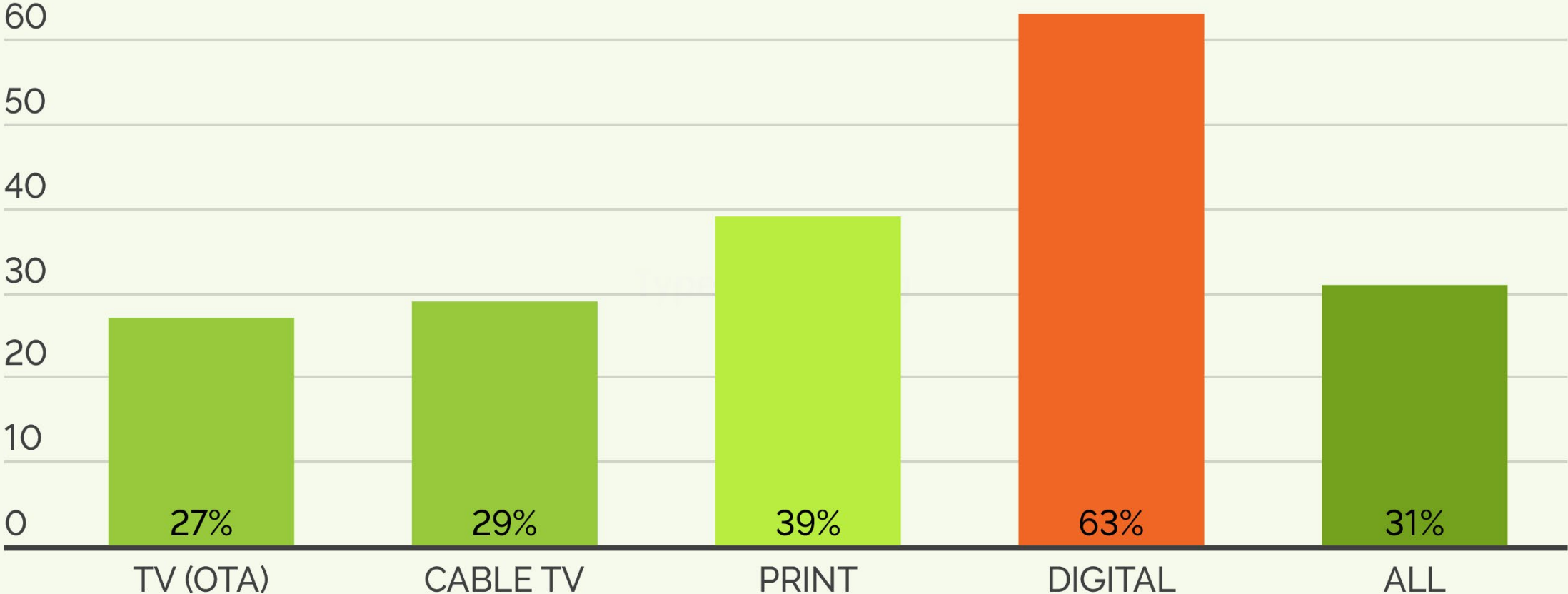


Media that are Expecting Annual Sales Revenue to Increase Significantly in the Health Sector (vs 2020)

NOTE: These Numbers Were Also High the Two Years Prior to COVID-19

U.S. sales managers, 11th State of Media Sales Study, Aug-Sept 2021, AdMall.com and BIA.com

Retail is Rebounding



Media that are Expecting Annual Retail Sales Revenue to Finish 2021 Up Significantly (vs 2020)

11th State of Media Sales Study, Aug-Sept 2021, AdMall.com and BIA.com



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Other Bright Spots

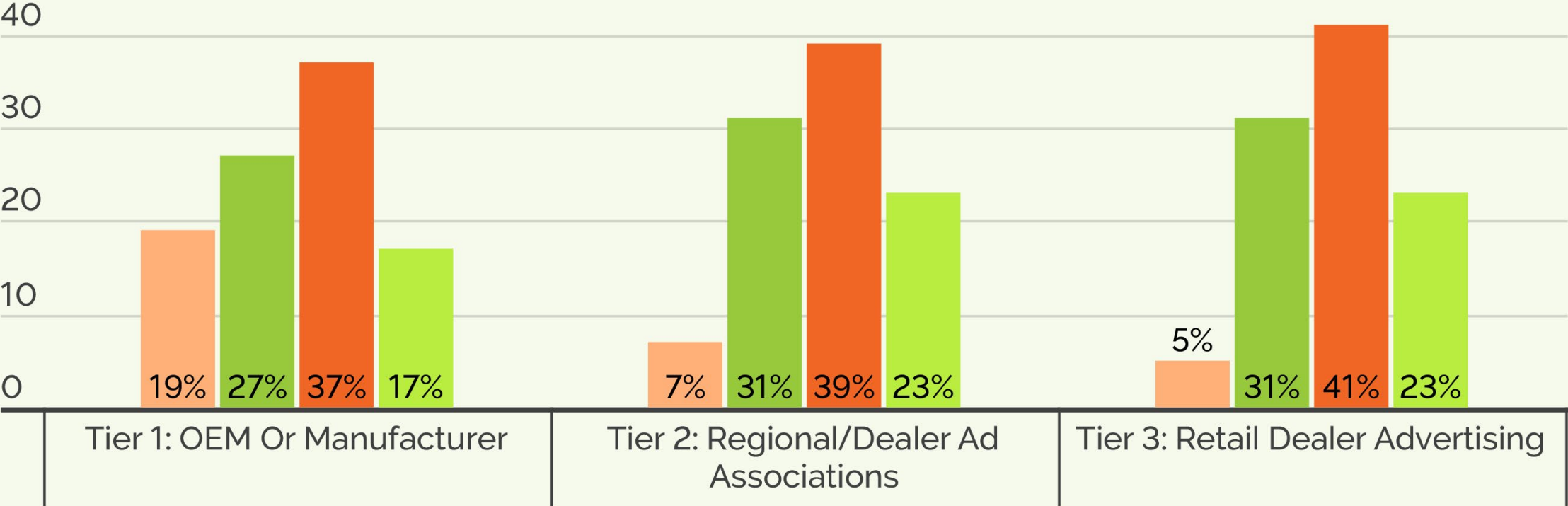
Account Type	Significant Increase for 2021
Local-Direct (SMB) Accounts	47%
Online-Only Businesses	33%
Programmatic/Self-Serve	33%
Co-op/Promotions	25%

- **21%** of print media managers expect significant increase in Native Advertising vs 2020
- Revenue from **events** starting to come back
- Will these declines turn around in 2022?
Major Accounts (**34%** expect significant 2021 decline), National Brands/CPG (**35%**), Agency Buys (**26%**)

U.S. sales managers, 11th State of Media Sales Study, Aug-Sept 2021, AdMall.com and BIA.com



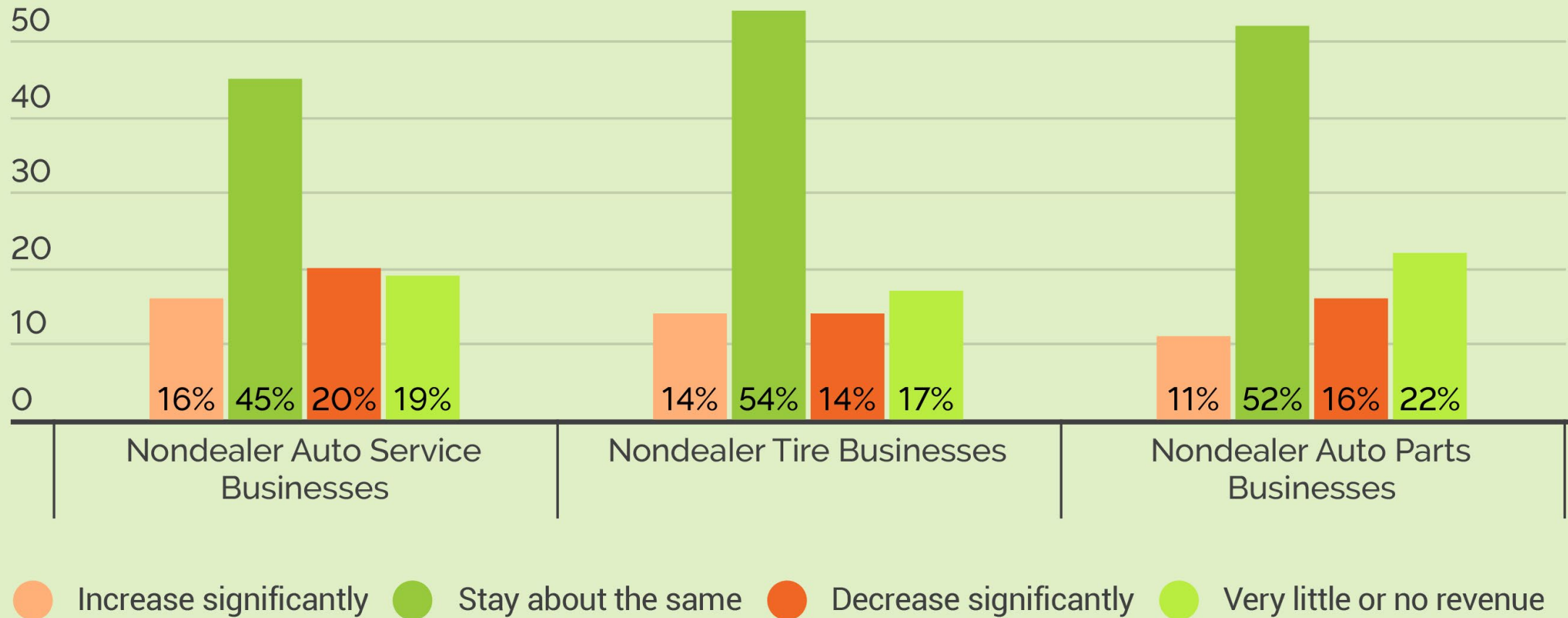
Supply Shortages Hurting All Tiers of Automotive Advertising



● Increase significantly
 ● Stay about the same
 ● Decrease significantly
 ● Very little or no revenue

Media that are Expecting 2021 sales revenue to increase, decrease or stay the same in the automotive sector (vs 2020)

2021 Automotive Aftermarket Revenue Expected to Be Flat



Media that are Expecting 2021 sales revenue to increase, decrease or stay the same in the automotive sector (vs 2020)

11th State of Media Sales Study, Aug-Sept 2021, AdMall.com and BIA.com

Looking Ahead

Where Ad Spend Exists in 2022



TV OTA in 2022

1. Political
2. Auto
3. General
4. Retail

Cable in 2022

1. Political
2. QSR/Fast Food
3. Full-Service Restaurants/Bars
4. Auto

Radio OTA in 2022

1. Finance/Insurance
2. Retail
3. Auto
4. Restaurants

Out of Home

1. Leisure/Recreation
2. General Services
3. Finance/Insurance
4. Retail

Print

1. Legal Services
2. Hospitals
3. Political
4. Supercenters and Warehouse Clubs

Digital (All Platforms)

1. Finance/Insurance
2. Retail
3. General Services
4. Technology

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

New Year, New Revenue:

Top Sectors for
Media Revenue Growth in 2022

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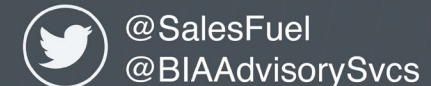
TUESDAY JAN 25
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Discussion and Q+A

Revenue



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Sales Management Perspective



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Bright Spots for Sales Managers

It's EASIER than 1 Year Ago to	Managers
Sell online/digital advertising	36%
Compete against other local media	25%
Get salespeople to sell new products	22%
Sell mobile advertising	22%
Upsell existing accounts	22%

11th State of Media Sales Study, Aug-Sept 2021, AdMall.com and BIA.com

Top Frustration Less Frustrating

Accounts cutting their advertising schedule or trying to reduce their contract with us

39%

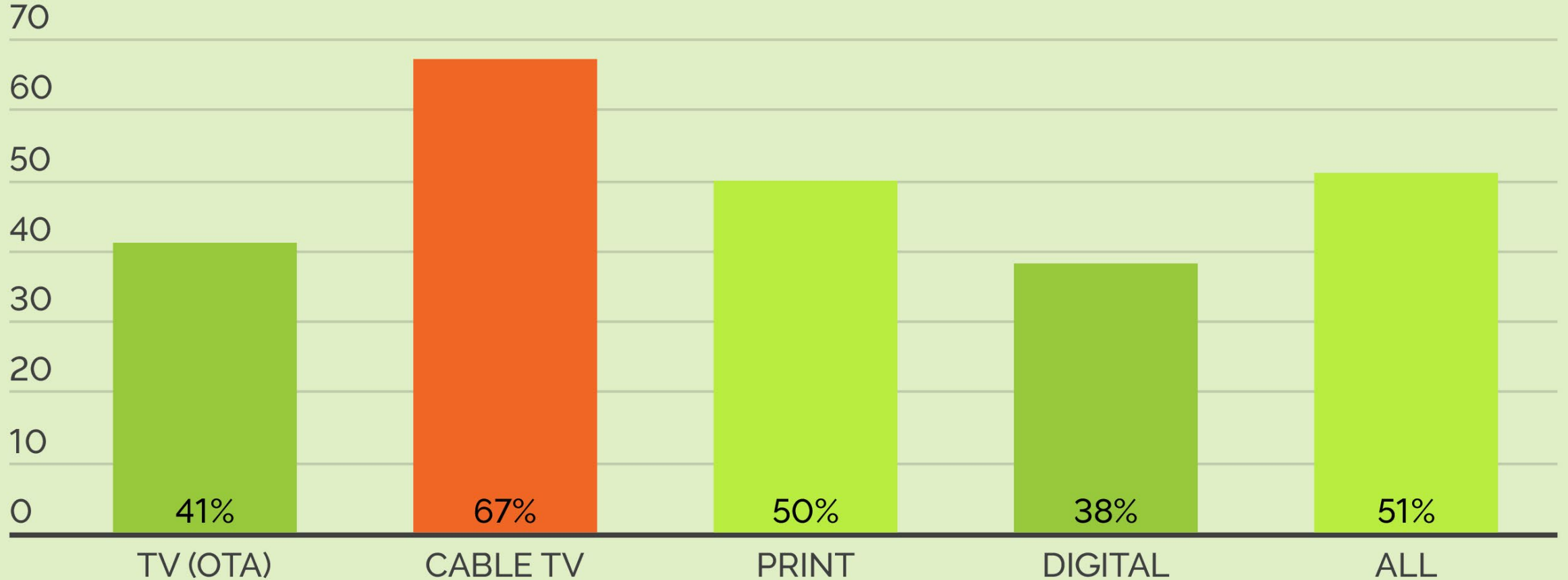
of U.S. media sales managers in 2021

59%

of U.S. media sales managers in 2020

Lead gen and time spent in meetings are still top non-staff frustrations

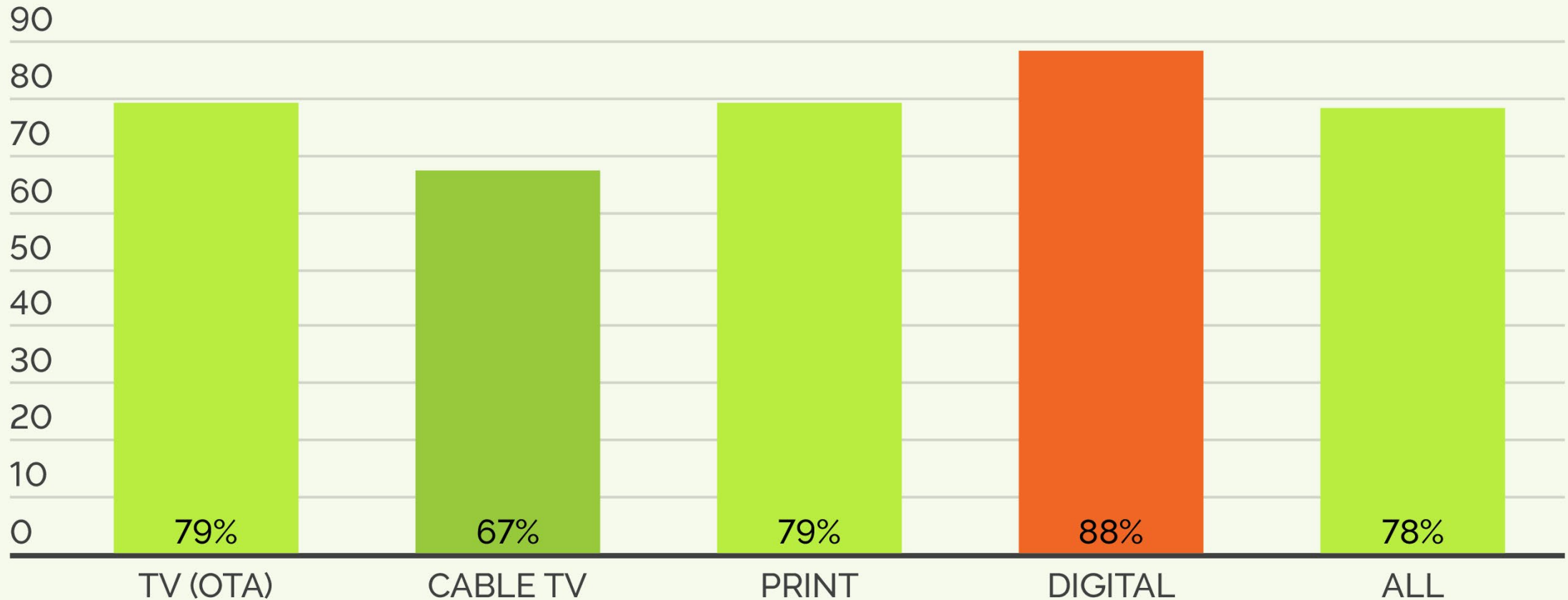
Sales Managers are Dealing with More Mental Health Concerns on Their Staff



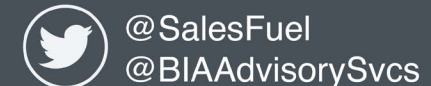
Media that Feel it's Harder Than This Time Last Year to Navigate Issues of Employee Stress, Anxiety and Mental Health

11th State of Media Sales Study, Aug-Sept 2021, AdMall.com and BIA.com

Finding High-Quality Salespeople is an Even Bigger Struggle



Media that feel it's harder than this time last year to find high-quality salespeople. NOTE: These numbers were also high the two years prior to COVID-19.
11th State of Media Sales Study, Aug-Sept 2021, AdMall.com and BIA.com



Where to Recruit Media Sellers

Beyond direct competitors and salespeople in other industries

- ❑ Hospitality Industry
- ❑ Local Colleges/Universities
- ❑ Staffers in other departments
- ❑ Personal relationships > Job boards
- ❑ “Background is irrelevant, character traits matter most”

11th State of Media Sales Study, Aug–Sept 2021, AdMall.com and BIA.com

Dangerous Shortcuts Being Taken

by sales managers across all industries

- **76%** have interviewed candidates they wouldn't have a year or two ago
- **69%** have hired candidates for open sales job they wouldn't have hired a year or two ago
- **It now takes 9 months** to off-board a poorly performing sales rep (compared to 7 mos. in 2019)

Voice of the Sales Manager Study, Oct–November 2021, SalesFuel.com



● 2021 Retention Rate: 72% (73% in 2020)



● 2021 NPS Score: 4 (Down from 16 in 2020)



23.9% of Media Sales Professionals Plan to Voluntarily Leave Their Jobs by August 2022

11th State of Media Sales Study, Aug-Sept 2021, AdMall.com and BIA.com

Highest Net Promoter Scores

+29

CABLE TV SELLERS

+26

**DIGITAL AGENCIES/
MEDIA SELLERS**

11th State of Media Sales Study, Aug-Sept 2021, AdMall.com and BIA.com

NPS scores for all U.S. sales positions was +22 in 2020
Voice of the Sales Rep, 2020, SalesFuel.com



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Discussion and Q+A

Sales Management



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Media Sellers Perspective

Good News About Digital



34%

of U.S. media sellers say it has gotten **EASIER to sell online/digital advertising** over the past 12 months

11th State of Media Sales Study, Aug–Sept 2021, AdMall.com and BIA.com

Not Yet Back in the Office

74%

of U.S. media sellers spend most of their time working from home

50%

of U.S. media sales managers spend most of their time in the office

61% of all media sales reps spend 75%+ of their time working from home.
85% of cable TV reps spend 75%+ of their time working from home.

11th State of Media Sales Study, Aug-Sept 2021, AdMall.com and BIA.com

Selling Challenges Post-Vaccine

It's Harder than 1 Year Ago to	Sellers	Managers
Overcome advertiser churn	58%	47%
Generate new business	58%	42%
Meet corporate expectations	50%	36%
Make money in my current position	46%	34%
Compete with Google, Facebook	29%	43%

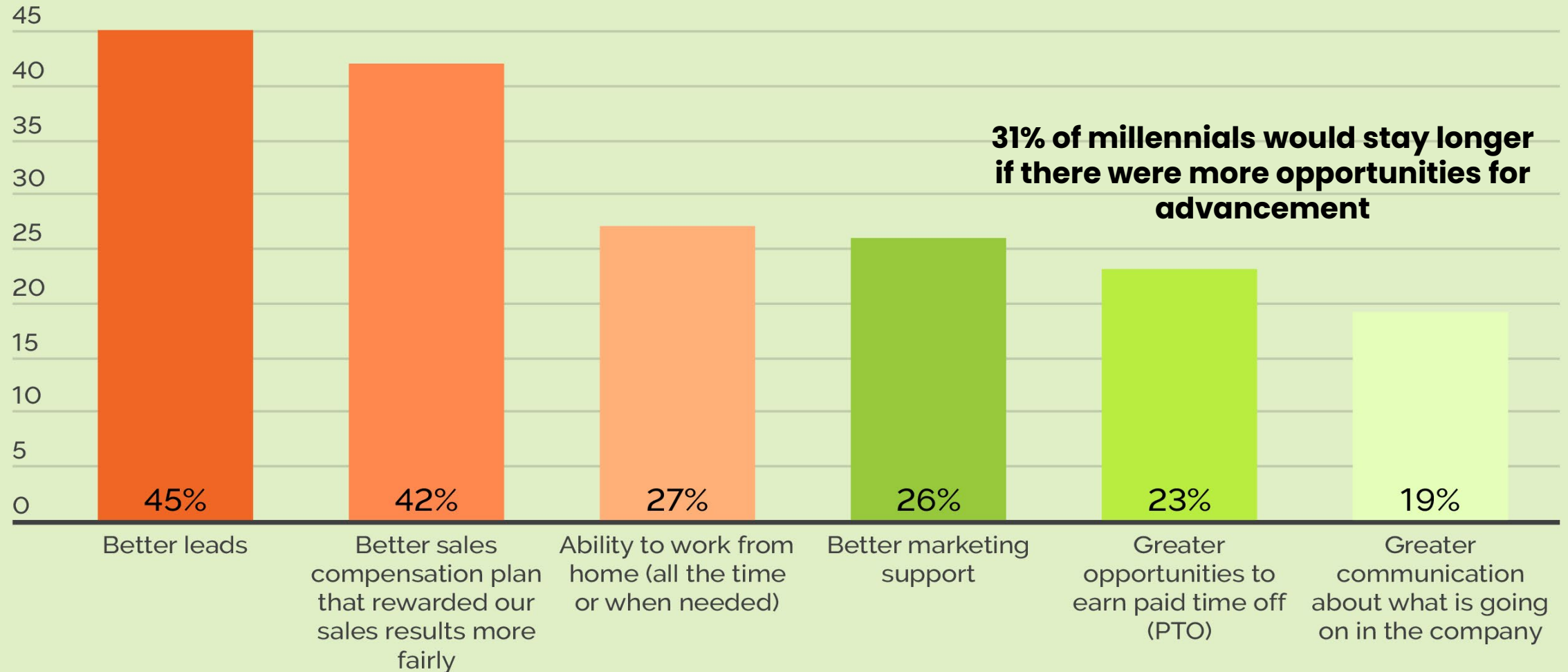
63% of media sellers' overall compensation is from commissions and bonuses (on average)

11th State of Media Sales Study, Aug-Sept 2021, AdMall.com and BIA.com



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Salespeople are More Likely to Stay at their Company Longer if they Receive...



Salespeople more likely to stay at a company longer if they provide these benefits

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Discussion and Q+A

Media Sellers

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Your Next Salesperson May Already Work at Your Company

- **Identify** high-potential sales candidates – even from other departments
- **Reveal** what keeps your existing salespeople from getting to the next level
- **Groom and Retain** existing team members that have the mindset for promotion



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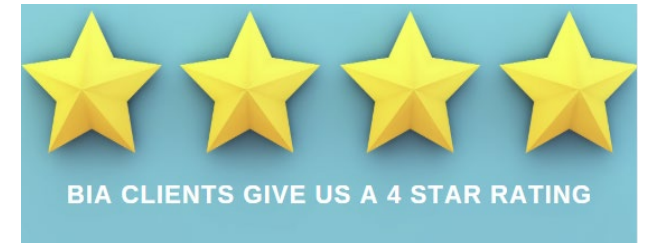
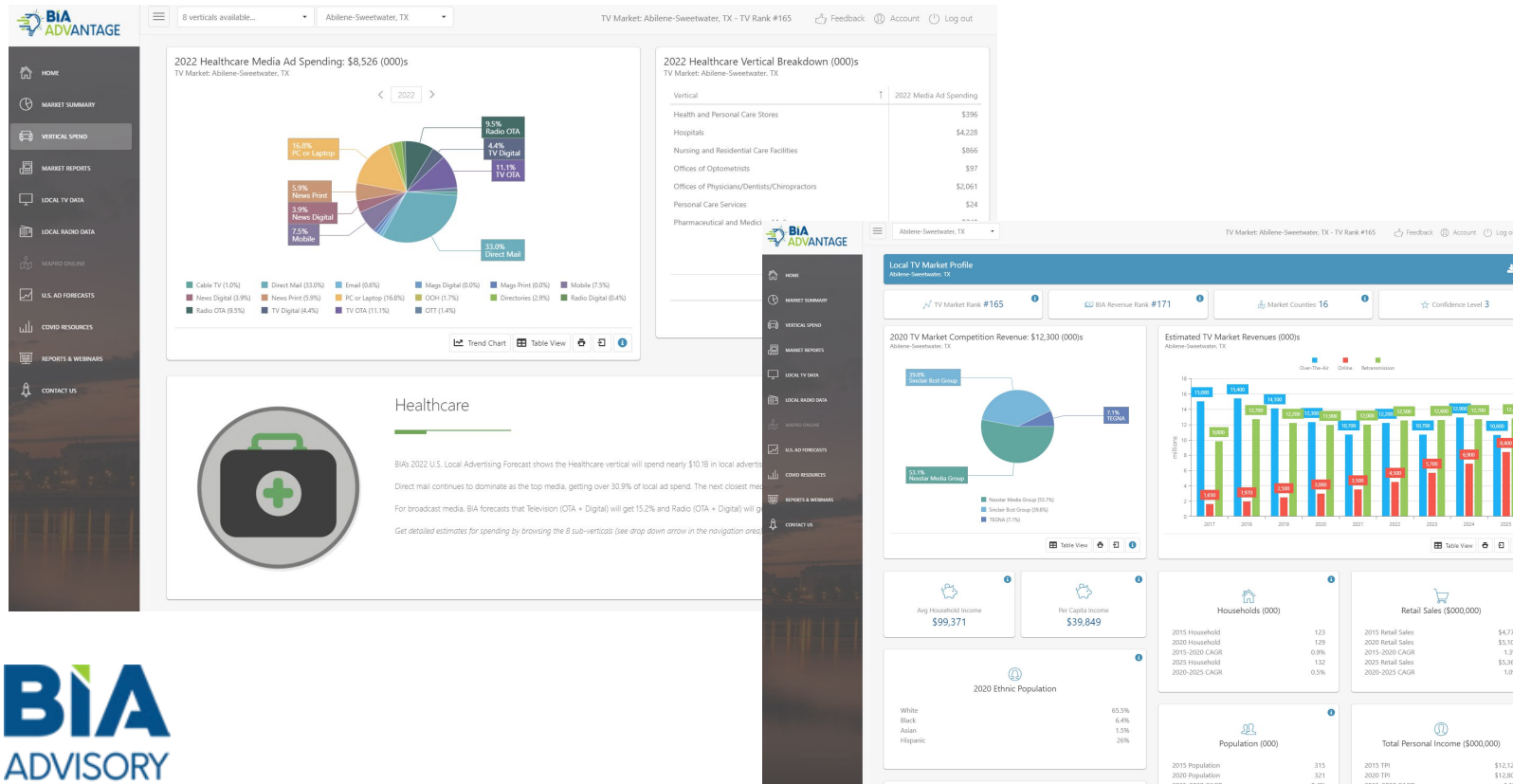
<http://bit.ly/BIA-ADVantage>

Clients' login here:

<https://advantage.bia.com/advantage@bia.com>

Demo request:

advantage@bia.com



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





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