WHAT'S NEXT?

BIA/Kelsey 2017 Analyst Predictions

January 2017

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EXECUTIVE SUMMARY

Making predictions is a core element of an analyst's work. Throughout the year, BIA/Kelsey analysts do just that, mapping the future of the local media and advertising landscape. It happens both quantitatively in forecasts and qualitatively through predicting products and company outcomes.

Every fall, BIA/Kelsey analysts huddle to create a more formal list of predictions for the coming year. This is intended to cap off the year and provide talking points for the year-ending conference, BIA/Kelsey NEXT. It's also meant to provide the BIA/Kelsey community with a key planning tool for the year that follows.

This document contains detailed 2017 predictions from across BIA/Kelsey's coverage areas. In addition to sections divided by analyst, you'll find a top ten list of predictions from our team. Together, these provide a highlight reel of the collective analyst viewpoint.

Meanwhile, the prediction process will be ongoing, carrying forward in 2017 day-to-day analyst coverage. Consider this report a snapshot that will evolve throughout the year. We expect there to be no shortage of fodder in this transformative period of technology and media.

MEET THE ANALYSTS

Suzanne Ackley

Senior Research Analyst

Covers: Traditional Media, Social Media, Digital Media

Michael Boland

Chief Analyst and VP, Content

Covers: Mobile Advertising, Social Media, Emerging Tech

Rick Ducey

Managing Director

Covers: Broadcast Media, Online Video, Programmatic Advertising

Mark Fratrik

VP, Chief Economist

Covers: Broadcasting, Competitive Media

Celine Matthiessen

VP, Analysis & Insights
Founder, Women Leading In Local

Covers: Competitive Intelligence, Market Research, Digital Media

Mitch Ratcliffe

Senior Analyst
Digital Media Strategist

Covers: Software, Publishing, On-demand Economy

TOP TEN ANALYST PREDICTIONS FOR 2017

U.S. MOBILE AD REVENUE WILL SURPASS $40 BILLION IN 2017.

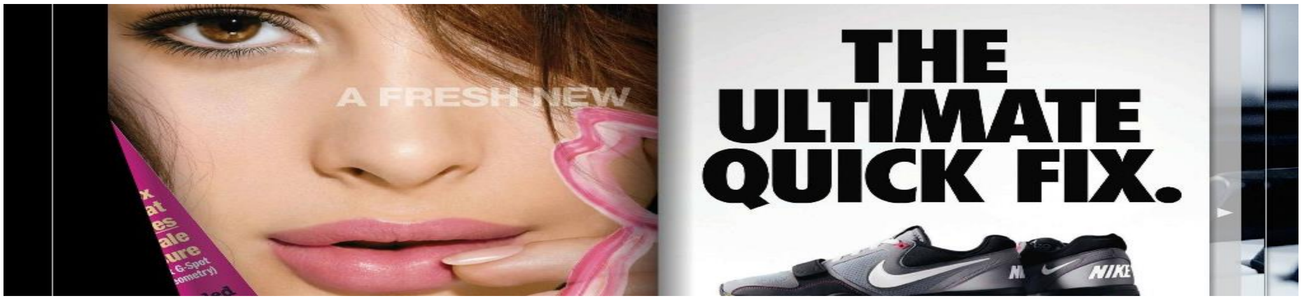
Michael Boland

U.S. mobile ad revenue will surpass $40 billion in 2017. Search will maintain the leading share of this total (40 percent in 2017), but it will continue to be chipped away by native social ads (35 percent in 2017) such as Facebook news feed ads, Instagram ads and Snapchat. Facebook's revenue growth will drive much of this, but it will have to extend beyond the company's owned and operated properties by relying more on the continued build-out of the Facebook Audience Network. That will include third-party apps as well as advertising that Facebook will facilitate in other channels such as over-the-top TV apps on Apple TV and ROKU. Facebook will base these deals on the appeal of its granular audience targeting from being the world's social graph.

WORKER RETENTION WILL BE THE CORE CONCERN FOR UBER, LYFT, TASKRABBIT AND OTHERS.

Mitch Ratcliffe

Worker retention will be the core concern for Uber, Lyft, TaskRabbit and others. Over the past six months, all marketplace providers have migrated toward offering worker-facing services, such as saving, tax management and insurance programs. These vertically siloed marketplaces' share of on-demand revenue will begin to drop in 2017 as more on-demand labor becomes disenchanted with poor pay and no benefits. In August 2016 Deloitte reported that a survey of 4,000 workers found 67 percent would not choose to accept "gig" work again under the current terms. Marketplace share of revenue currently ranges from 20 percent to 30 percent of the worker's earnings. These companies will need to lower their share of revenue to close to 5 percent, building secondary and tertiary revenue lines through services offered to workers. Labor, like customers, looks for the best deal.



PRINT WILL CONTINUE TO EVOLVE AND MAINTAIN A LARGE SHARE OF SMALL BUSINESSES' DOLLARS BY EXTENDING CAMPAIGNS WITH DIGITAL MEDIA.

Celine Matthiessen

Print is evolving and still holds a large share of small businesses' dollars. This will continue as smart companies extend print campaigns through native and digital targeted media. In our forecast for 2017, $53 billion will be spent on local print. Newspapers, magazines and Yellow Pages are offsetting print declines in print revenue with digital. These traditional digital efforts are projected to grow annually 4.0 percent from 2017 to 2021. Newspapers and Yellow Pages companies continue to extend their advertisers' reach through large networks via programmatic ad buying beyond their owned and operated properties, which levels the playing field and helps them to retain advertisers that are shifting their share to digital. Selling into programmatic will continue to accelerate the shift in money and use from traditional to digital as it becomes more available for video and native. Programmatic will morph to be the center of campaigns vs. an extension of traditional.

NATIONAL BRANDS WILL OUTPACE REGIONAL AND LOCAL SMBS IN TOTAL AD SPEND TO TARGET LOCAL AUDIENCES.

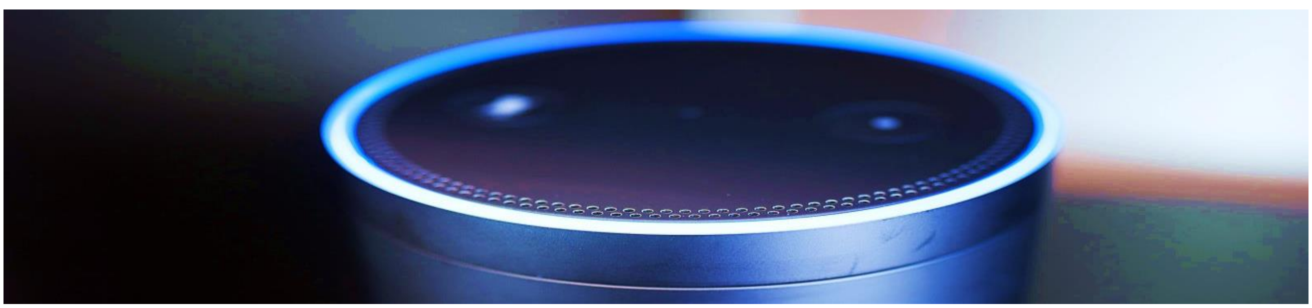
Rick Ducey

National brands will outpace regional and local small and medium-sized businesses (SMBs) in total ad spend growth to target local audiences. Agencies and marketers for these national brands will increase their ad spend targeting local audiences by $17.1 billion from 2015 through 2020. Regional advertisers' spending will be relatively flat, and local SMBs will increase their spend by $10.6 billion. We see the large increase in ad spend by national marketers as reflective of better and more usable data about local audiences in media planning and buying and the greater return on investment in local instead of national media investment and activations.

LOCAL TELEVISION STATIONS WILL SEE A DECLINE IN OVER-THE-AIR (OTA) ADVERTISING REVENUE OF MORE THAN THREE PERCENT.

Mark Fratrik

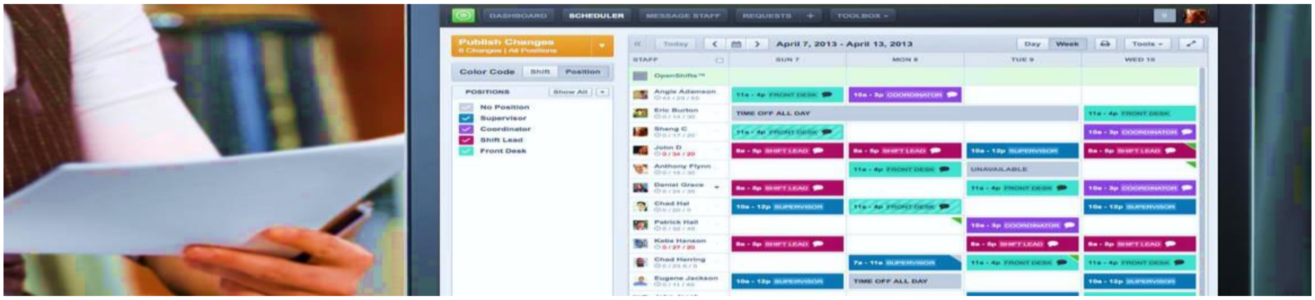
After a year of strong advertising growth fueled by heavy political advertising, local television stations will once again see a decline in over-the-air (OTA) advertising revenue of more than three percent. At the same time, online revenue should increase by a high single-digit percentage, and retransmission consent revenue will continue to soar, allowing many local television stations to remain strong local competitors. They are still ranked number two in the overall local media marketplace. Local television stations will also see further developments in the rolling out of a new transmission system that will open up new business opportunities.



VOICE SEARCH WILL REACH 25 PERCENT OF MOBILE SEARCH VOLUME.

Michael Boland

Voice search will reach 25 percent of mobile search volume. This will mostly happen through personal assistant apps such as Google Assistant, Microsoft Cortana, Apple's Siri and Amazon's Alexa. Google will emerge as the winner in what will be known as the "personal assistant app wars." These wars will be won with data, which Google possesses from its search index and knowledge graph. Amazon's Alexa will shine for product and commerce applications, while Microsoft and Apple will seek to excel with vertically specific content niches where they can establish best of breed content with data partners (i.e., using weather data). Though Siri lacks comprehensive data, the wild card in the personal assistant app wars will be Apple's AirPod earpieces. They will emerge as a pervasive and ambient audio channel to inform consumers about their surroundings. AirPod usage behavior will be established in 2017, with ad models to follow in later years. Based on growing prominence for these channels, artificial intelligence will become the next battleground in local commerce.



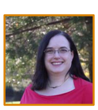
SERVICE COMMERCE, CUSTOMER RELATIONSHIP MANAGEMENT (CRM) AND TRANSACTIONAL TOOLS WILL BECOME COMMON IN THE SMB MARKET IN THE NEXT TWO YEARS.

Mitch Ratcliffe

Service commerce (i.e., the combination of social tools, scheduling tools for individual and fleet management), customer relationship management (CRM) and transactional tools will become common in the SMB market in the next two years. As of 2016, BIA/Kelsey's Local Commerce Monitor (LCM) survey (Wave 20, Q3/2016) found that only 24.2 percent of SMBs have embraced CRM tools and cloud-hosted small team scheduling capabilities are just coming to market. The LCM survey found 33.3 percent of SMBs are currently interested in these tools. However, SMBs also want to use bundled services that are well integrated, and many current scheduling tools lack a full suite of business management capabilities. There is consolidation ahead in this market. We estimate that service commerce will achieve 20 percent penetration among very small businesses (one employee) and SMBs (two to 100 employees) by 2020, representing potential vendor revenue of $2.5 billion.

SOCIAL MEDIA USAGE WILL CONTINUE TO INCREASE AMONG SMBS.

Suzanne Ackley

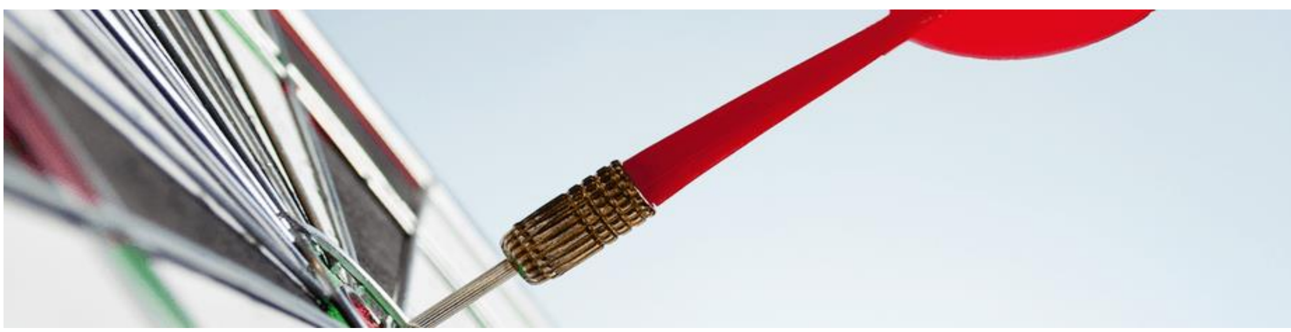


Social media usage is increasing among SMBs, growing from 69 percent in 2013 to 77.6 percent in 2016. Social media usage for advertising and promotion will continue to rise in 2017, achieving 80 percent adoption among SMBs. Three out of four businesses surveyed in BIA/Kelsey's Local Commerce Monitor (LCM) (Wave 20, Q3/2017) use social media for marketing purposes, with a Facebook Page coming in highest in usage at 45 percent. Survey respondents found Twitter video, Facebook video and Facebook ads to provide "excellent" or "extraordinary" ROI and plan to increase their spend on these media channels. With more SMBs using social media to market their businesses and interact with customers, social media and reputation monitoring will become increasingly important in 2017.

LOCAL RADIO STATIONS WILL FACE INCREASED COMPETITION FOR REVENUE FROM NEW AND EXPANDING AUDIO ENTERTAINMENT & INFORMATION SOURCES.

Mark Fratrik

Local radio stations will continue to see increased competition from new and expanding audio entertainment/information sources constraining their ability to increase revenue. Over-the-air (OTA) advertising revenue will only increase one percent in 2017, and online/digital will grow 11.5 percent. As a result, local radio stations' share of the total advertising market will be 10.5 percent in 2017. While its share is somewhat smaller than in previous years, local radio still ranks sixth in terms of ad spending, slightly behind local newspapers and mobile.



LOCAL PROGRAMMATIC TV WILL BE EVOLUTIONARY NOT REVOLUTIONARY.

Rick Ducey

Local programmatic TV, the overlay of rich audience targeting data beyond gender/age with automated and more efficient workflows, will be evolutionary not revolutionary. For local TV stations, we will continue to see the building blocks come to market, but true programmatic won't be a large factor in terms of ad spend. It will total less than five percent of total local broadcast TV advertising in 2017.

ANALYST INDIVIDUAL PREDICTIONS

Mobile, Social Media, Emerging Tech

Mike Boland

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Voice search will reach 25 percent of mobile search volume. This will mostly happen through personal assistant apps such as Google Assistant, Microsoft Cortana, Apple's Siri and Amazon's Alexa. Google will emerge as the winner in what will be known as the "personal assistant app wars." These wars will be won with data, which Google possesses from its search index and knowledge graph. Amazon's Alexa will shine for product and commerce applications, while Microsoft and Apple will seek to excel with vertically specific content niches where they can establish best of breed content with data partners (i.e., using weather data). Though Siri lacks comprehensive data, the wild card in the personal assistant app wars will be Apple's AirPod earpieces. They will emerge as a pervasive and ambient audio channel to inform consumers about their surroundings. AirPod usage behavior will be established in 2017, with ad models to follow in later years. Based on growing prominence for these channels, artificial intelligence will become the next battleground in local commerce.

Chatbots and conversational commerce will grow into a meaningful local commerce channel.

Chatbots and conversational commerce will grow into a meaningful local commerce channel, especially for simple consumer requests such as appointment scheduling. Bots and conversational commerce won't be the dominating force that their 2016 hype cycle suggests. 2017 mobile messaging revenue in the U.S. will total roughly $630 million (2 percent of U.S. mobile ad spending), which includes sponsored/paid placements in conversational commerce and chatbot interfaces. Consumers — driven by a human need to converse — will opt instead to call businesses in most cases, meaning voice will sustain its position as a primary local commerce modality. This will especially be the case in high-value verticals with complexity and high-consideration cycles (autos, financial services and health care). Global click-to-call spending will exceed $8 billion.

Facebook will continue to pull ahead from the pack as the leading local marketing channel, reaching 70 million worldwide Pages, 10 percent of which are paid.

Facebook will continue to pull ahead from the pack as the leading local marketing channel, reaching 70 million worldwide Pages, 10 percent of which are paid. It will expand the utility of Pages and ads by adding more action buttons beyond the current Buy, Call, Message and Book options. These action buttons will grow to support a broader range of consumer services. To get there Facebook will both build these internally and partner with best of breed start-ups in the service commerce realm to bring added functionality to Pages in different verticals (restaurant bookings, service appointments, etc.).

Snapchat will emerge as the fastest-growing localized mobile marketing channel of 2017, with ad revenue that exceeds $1 billion.

Snapchat will emerge as the fastest-growing localized mobile marketing channel of 2017, with ad revenue that exceeds $1 billion. This will build from its geo-filters product, as well as Stories. It will start with brands, which will build localized campaigns around native and content marketing. This will bring about a golden age of quality creative in mobile advertising and marketing. It will be driven by thoughtful multimedia creative, which will resonate with buying-empowered millennials who are prevalent on Snapchat. Snapchat will also launch additional ad localization features this year as well as commercial and transactional features such as Pinterest-style indicators of product identification, local availability and transactional capability. It won't yet be adopted in these ways by SMBs in 2017, apart from a few early adopter exceptions.

Software, Publishing, On-Demand Economy

Mitch Ratcliffe

The pricing-in of the $22.8 billion hours of unpaid household labor will produce a $3.1 trillion lift in U.S. GDP by 2030.

The pricing-in of the $22.8 billion hours of unpaid household labor will produce a $3.1 trillion lift in U.S. GDP by 2030. In 2015, BIA/Kelsey estimated on-demand market services revenue was approximately $22.5 billion, or 4.4 percent of the addressable market of $510 billion. Half that revenue was attributable to Uber. By the end of 2016, as more consumers are able to easily access on-demand services, actual spending will grow by more than 160 percent to approximately $36 billion as formal "gig" work becomes institutionalized. BIA/Kelsey estimates the 2016 addressable market for on-demand market solutions is $660 billion based on the total percentage of U.S. adults who can conveniently access on-demand services in the industries currently providing household services, including home cleaning, cooking and driving.

On-demand work will continue to rise.

On-demand work will continue to rise. A quarter of Americans have earned income in 2016 from the "gig" and "sharing" economy — both components of the local on-demand shift — according to Pew Research Center (November 2016). As e-commerce has taken almost two decades to reach 10 percent of total retail sales, social commerce and on-demand services are at an early, pivotal moment when brands have the opportunity to consolidate long-term engagements with large populations of workers and entrepreneurs seeking new outlets for their labor. This market will mature faster, as innovation acceleration creates more efficiency in marketing, advertising and listing performance. Current market penetration for all on-demand services is 4.4 percent, which will rise to 11.3 percent by 2019.

Worker retention is the new core concern for Uber, Lyft, TaskRabbit and others.

Over the past six months, all marketplace providers have migrated toward offering worker-facing services, such as saving, tax management and insurance programs. These vertically siloed marketplaces' share of on-demand revenue will begin to drop in 2017 as more on-demand labor becomes disenchanted with poor pay and no benefits. In August 2016 Deloitte reported that a survey of 4,000 workers found 67 percent would not choose to accept gig work again under the current terms. Marketplace share of revenue currently ranges from 20 percent to 30 percent of the worker's earnings. These companies will need to lower their share of revenue to close to five percent, building new revenue lines through services offered to workers. Labor, like customers, looks for the best deal.

Business freelancing among senior executives and director-level workers will grow substantially.

Business freelancing among senior executives and director-level workers will grow substantially in the next three years. Logistics and enterprise resource planning capabilities allow businesses to compartmentalize projects and outsource them more effectively. A boom in on-demand business services will drive more than $600 million in freelance work within large enterprises by 2020. In 2016 BIA/Kelsey estimates that approximately $150 million in project-based revenue shifted from traditional employment models to project-based compensation. These prosperous home-based workers will, in turn, demand more in-home services, including personal and business experiences. Ultimately, on-demand work is a lifestyle that is only starting to take shape.

Service commerce, CRM and transactional tools will become common in the SMB market during the next two years.

Service commerce (i.e., the combination of social tools, scheduling tools for individual and fleet management), CRM and transactional tools will become common in the SMB market during the next two years. As of 2016, BIA/Kelsey's Local Commerce Monitor

(LCM) (Wave 20, Q3/2017) found that only 24.2 percent of SMBs have embraced CRM tools and cloud-hosted small team scheduling capabilities are just coming to market. The LCM survey found 33.3 percent of SMBs are currently interested in these tools. However, SMBs also want to use bundled services that are well integrated, and many current scheduling tools lack a full suite of business management capabilities. There is consolidation ahead in this market. We estimate that service commerce will achieve 20 percent penetration among very small business (one employee) and SMBs (two to 100 employees) by 2020, representing potential vendor revenue of $2.5 billion

Competitive Intelligence, Market Research, Digital Media

Celine Matthiessen

Print will continue to evolve and maintain a large share of small businesses' dollars by extending campaigns with digital media.

Print is evolving and still holds a large share of small businesses' dollars. This will continue as smart companies extend print campaigns through native and digital targeted media. In our forecast for 2017, $53 billion will be spent on local print. Newspapers, magazines and Yellow Pages are offsetting print declines in print revenue with digital. These traditional digital efforts are projected to grow annually 4.0 percent from 2017 to 2021. Newspapers and Yellow Pages companies continue to extend their advertisers' reach through large networks via programmatic ad buying beyond their owned and operated properties, which levels the playing field and helps them to retain advertisers that are shifting their share to digital. Selling into programmatic will continue to accelerate the shift in money and use from traditional to digital as it becomes more available for video and native. Programmatic will morph to be the center of campaigns vs. an extension of traditional.

Yellow Pages industry will keep transforming to offset print losses through decentralized operations that focus on vertical industry, country or consumer opportunities.

Despite Hibu's two bankruptcy filings this year and Dex Media's fifth reorganization, the Yellow Pages industry keeps transforming to offset print losses through decentralized operations that focus on vertical industry, country or consumer opportunities. Yellow Pages is not dead in the water, but to grow it needs to continue to evolve and stay competitive. BIA/Kelsey's Local Commerce Monitor (LCM) (Wave 20, Q3/2017) shows that most SMBs use print Yellow Pages year over year and report that they maintain their spend on print even while increasing their digital spend. Yellow Pages companies are compensating for print declines through digital, and in our local media forecast Internet Yellow Pages is set to grow 3.4 percent between 2015 and 2020. Some ways this is happening: YP divided its print from digital operations and continues to build a strong mobile local presence with $1 billion in digital sales annually; Dex is betting on marketing automation platform DexHub to manage digital; print advertising company Berry has acquired several companies and rebranded as Vivial to become a digital agency where print is part of the diverse offering; and Hibu reports 55 percent of current revenue is from digital services and is focusing on countries (U.K., Spain) where it can grow through local, as well as becoming the first traditional media Facebook marketing partner for SMBs. Yellow Pages companies will keep offsetting print revenue with digital by maintaining their focus on being the most able to provide a local audience for advertisers through their owned and operated networks.

Franchises will continue to be early adopters of new technology and marketing.

They are a gold mine for marketing automation, investing heavily to compete successfully for local customers. Franchises are on the leading edge of consumer trends and keep up with where their customers are on digital. In fact, their awareness of technology tools and new technology for marketing is higher than an average SMB in our survey. For example, 53 percent of franchises already use beacon technology, and a quarter use beacons on products in store. Additionally, they use customer data, including point-of-sale information, for marketing at a higher rate (40 percent) than a typical small business. This early adoption will continue, and we will see some of the newer marketing tools and tech grow thanks to this group of SMBs. We will see franchises adopt virtual reality and other newer marketing. Franchises will continue to drive new ad tech adoption with a quarter of them using virtual reality and other new ad tech including live social video in 2017.

Traditional Media, Social Media, Digital Media

Suzanne Ackley

Social media usage is increasing among SMBs, growing from 69.0 percent in 2013 to 77.6 percent in 2016.

Social media usage for advertising and promotion will continue to rise in 2017, achieving 80 percent adoption among SMBs. Three out of four businesses surveyed in Wave 20 of our Local Commerce Monitor survey use social media for marketing purposes, with a Facebook Page coming in highest in usage at 45 percent. Survey respondents found Twitter video, Facebook video, and Facebook ads to provide "excellent" or "extraordinary" ROI and plan to increase their spend on these media channels. With more SMBs using social media to market their businesses and interact with customers, social media and reputation monitoring will become increasingly important in 2017.

Broadcast Media, Online Video, Programmatic Advertising

Rick Ducey

National brands will outpace regional and local SMBs in total ad spend.

National brands will outpace regional and local SMBs in total ad spend growth targeting local audiences. Agencies and marketers for these national brands will increase their ad spend targeting local audiences by $17.1 billion from 2015 through 2020. Regional advertisers' spending will be relatively flat, and local SMBs will increase their spend by $10.6 billion. We see the large increase in ad spend by national marketers as reflective of better and more usable data about local audiences in media planning and buying and the greater ROI in local vs. national media investment and activations.

Local programmatic TV will be evolutionary not revolutionary.

Local programmatic TV, the overlay of rich audience targeting data beyond gender/age with automated and more efficient workflows, will be evolutionary not revolutionary. For local TV stations, we will continue to see the building blocks come to market, but true programmatic won't be a large factor in terms of ad spend. It will total less than five percent of total local broadcast TV advertising in 2017.

Mood of country will shift as a result of underlying economic, demographic, social, cultural and technological changes.

The mood of the country will shift as a result of underlying economic, demographic, social, cultural and technological changes. In sum, these factors impact differentially at a local level. As Tip O'Neill, former Speaker of the U.S. House of Representatives, once observed, "all politics is local." Marketers seeking to create a unified customer experience with their brands increasingly are realizing they must factor in local signals in developing consumer profiles. They ignore the relevance of local at their peril. We expect to see resurgence in campaigns optimized for local signals. Overall, BIA/Kelsey forecasts the increase in spend from national marketers targeting local audiences to be more than $17 billion in the 2016-2021 period.

Media and marketing firms want more integration and common platforms in their advertising and marketing technology.

Media and marketing firms want more integration and common platforms in their advertising and marketing technology. This will drive the M&A market and inform product strategies for companies developing integrated suites of products and services to increase acceptance of their platforms. But as we saw with Facebook, Amazon, Google, PayPal and other major platform companies, it takes a lot of velocity to escape the gravity of these big players. Strategies like Adobe's acquisition of TubeMogul, Microsoft's purchase of LinkedIn, and Verizon's acquisition of AOL and possibly Yahoo are directed at creating new platforms offering economies of scope and scale. We expect to see Salesforce look for something on the order of the LinkedIn deal that Microsoft won to build out its social platform. IBM is on a data tear and may be making some more consolidating acquisitions in this space, like its Weather Co. purchase. Finally, SintecMedia just finished its purchase of ad technology firm Operative and may not be done shopping.

Broadcast, Competitive Media

Mark Fratrik

Local television stations will see a decline in OTA advertising revenue.

After a year of strong advertising growth fueled by heavy political advertising, local television stations will once again see a decline in OTA advertising revenue in 2017 of more than three percent. At the same time, online revenue should increase by a high single-digit percentage, and retransmission consent revenue will continue to soar, allowing many local television stations to remain strong local competitors. They are still ranked number two in the overall local media marketplace. Local television stations will also see further developments in the rolling out of a new transmission system that will open up new business opportunities.

Local radio stations will face increased competition from new and expanding audio entertainment/information sources.

Local radio stations will continue to see increased competition from new and expanding audio entertainment/information sources constraining their ability to increase revenue. OTA advertising revenue will only increase one percent in 2017 and online/digital will grow 11.5 percent. As a result, local radio stations' share of the total advertising market will be 10.5 percent in 2017. While its share is somewhat smaller than in previous years, local radio still ranks sixth in terms of ad spending, slightly behind local newspapers and mobile.

The provision of "skinny bundles" and consumers opting to "cut the cord" will negatively affect the cable/satellite business.

The provision of "skinny bundles" and consumers opting to "cut the cord" will negatively affect the cable/satellite business during the next five years, with a possible benefit accruing to local television broadcasters. Those consumers will have fewer cable networks to choose from and could easily start watching more local broadcast programming, so long as they are equipped with receivers connected to digital antennas.

Local events (e.g., concerts and sponsored local bridal services conventions) will become extremely important to local radio stations.

Events (e.g., concerts and sponsored local bridal services conventions) will become even more important to local radio stations searching for revenue streams to replace the stagnant OTA revenue. Utilizing their local assets allows broadcasters to develop these business lines. For some radio broadcasters, event-related revenue streams could be as much as 20 percent to 25 percent of their total revenue.

Retransmission consent revenue generated by local television stations will be an increasingly important part of their total revenue for broadcasters.

Retransmission consent revenue generated by local television stations will be an increasingly important part of their total revenue for broadcasters. For some of the largest groups, the percentage of their gross revenue attributable to gross retransmission consent revenue will exceed 25 percent in 2017.

ABOUT BIA/KELSEY

BIA/Kelsey is a market research and analyst firm that focuses on all things local. Local media is an increasingly dynamic area of ad spending and is quickly evolving with emerging digital platforms like mobile, social and search.

Over three decades, BIA/Kelsey has been an authority on these developing technologies as well as their forbearers in traditional media, which continue to transform as they likewise compete for local ad dollars and consumer affinity.

Through a suite of products that include research reports, articles, conferences and client consulting, BIA/Kelsey analyzes the financial, social and technology trends affecting local media.

Readers, event attendees and clients are given the inside track on data, analysis, and tactics needed to grow and transform in a rapidly evolving media and advertising landscape.

Learn more about us at www.biakelsey.com.