

AGENDA

egta.

RADIO STUDY TRIP TO

SAN

FRANCISCO

BAY AREA

22/10/2017 (SUN) – 26/10/2017 (THU)

## ABOUT THE TRIP

egta is organising a third edition\* of the radio study trip, this time to San Francisco and the Silicon Valley – the centre of innovation in audio distribution and advertising. This will give participants – a delegation of 30 business leaders from egta member companies – an opportunity to better understand and anticipate the evolution of new advertising technologies and trends, in particular in audio marketing. The agenda of the trip will also focus on innovations in the fields of radio and audio such as programmatic and automation, innovations in advertising formats, measurement and data strategies, artificial intelligence and voice activation, streaming and on-demand audio, transformation recipes from U.S. radio companies, etc.

\*In 2013 egta organised a radio study trip to San Francisco and the Silicon Valley. In 2015 an egta delegation visited New York.



egta is the leading European trade association representing more than 130 television, radio and multimedia advertising sales companies, established across 39 markets in Europe and beyond. Our members commercialise the advertising space of hundreds of TV channels and radio stations and represent approximately 70% of the European advertising market.

## DAY 01: 22 / 10 / 2017 (SUN)

<b>Individual transfers &amp; check in</b>	<b>Delegation arrives in San Francisco</b> Check in at the <b>San Francisco Marriott Union Square</b> <u>Address:</u> 480 Sutter Street, San Francisco, CA 94108
<b>18:45 – 21:30</b>	<b>Meeting in the Marriott hotel lobby – WALK TO DINNER</b> <b>OPENING DINNER AT SCALA BISTRO</b> <u>Address:</u> 432 Powell Street, San Francisco, CA 94102 (2 min walk from the hotel)

## DAY 02: 23 / 10 / 2017 (MON)

Meeting venue: San Francisco **MARRIOTT UNION SQUARE** (480 Sutter Street) – meeting room **SUTTER III**

<b>08:45 – 09:00</b>	<b>WELCOME</b>
<b>09:00 – 10:00</b>	<b>EDISON RESEARCH</b>
 <p>▪ <b>Speaker:</b> <b>Larry Rosin</b> Co-Founder &amp; President</p>	Larry Rosin has been involved with media for over 20 years, his specialty is audience research. He is recognised as one of the leading thinkers in the field, and advises many of the world's largest media companies. Rosin is President of Edison Research, which he co-founded in 1994. Since then he has been a primary force in building the company into one of the world's most respected survey research companies, with a particular specialization in media and election polling. Edison is best known as the company that performs Exit Polls for all U.S. Elections for the National Election Pool (a consortium currently comprised of ABC, CBS, CNN, and NBC). In addition, Edison is well known for its groundbreaking media research series "The Infinite Dial" which tracks developments in digital media, and "Share of Ear" which measures all audio usage in the U.S.
<b>10:00 – 11:00</b>	<b>AMPLIFI MEDIA</b>
 <p>▪ <b>Speaker:</b> <b>Steven Goldstein</b> Founder &amp; Chief Executive Officer</p>	Steven Goldstein is recognised as a thought leader in radio marketing, management and development of on-demand audio strategies with current and new podcasters as well as broadcasters. He has created and developed numerous successful radio brands and nurtured and advanced local and national talent. Steven is a frequent speaker at major podcast and broadcast events. Amplifi Media is audio innovation firm that works with media companies and podcasters advising on content strategy, marketing and development for on-demand audio.

11:00 – 11:30	COFFEE BREAK - SUTTER I
11:30 – 12:30	JELLI
 <p>▪ <b>Speaker:</b> <b>Michael Dougherty</b> <i>Founder &amp; Chief Executive Officer</i></p>	<p>Jelli is the first cloud-based ad platform for the \$20 billion US radio market. Jelli-served ads reach over 245 million listeners monthly across more than 1,200 radio stations throughout the U.S. Jelli creates a connected ecosystem for audio advertising, providing solutions for both buyers and sellers. It offers SpotPlan, a web-based programmatic buying platform for buying radio advertising; RadioSpot, a cloud-based advertising server for broadcast radio, and automating terrestrial radio advertising; and RadioDash, a campaign dashboard for radio campaigns. During our meeting, we will get an update on implementation of automation across U.S. broadcast sales by iHeart Media, the largest radio broadcaster, and Katz Media Group, the largest radio sales house in the U.S.</p>
12:30 – 13:30	LUNCH - SUTTER I
13:30 – 14:30	INSTREAMATIC.AI
 <p>▪ <b>Speaker:</b> <b>Stas Tushinskiy</b> <i>Co-Founder &amp; Chief Executive Officer</i></p>	<p>Instreamatic is a technology company which has developed a unique and scalable solution that allows voice interaction with ads on mobile and voice assistant devices like Echo and Google Home. The AI-powered voice response technology works with audio ads across different mobile platforms. When the advertising comes on, users are in control and can ask to hear more details, add an event to a calendar, skip an ad, or call a company. This offers a great opportunity for radios to turn their advertising spots into interactive ones, making the most of voice control technology.</p>
14:30 – 15:30	VERITONE
 <p>▪ <b>Speaker:</b> <b>Drew Hilles</b> <i>Senior Vice President</i></p>	<p>Veritone is a cloud-based artificial intelligence media tech company pioneering the world's first Cognitive Media Platform. The company is focused on audio and its tools allow broadcasters and their sales houses to monitor and analyse audio data, which can be used for real-time tracking of advertisements and other content. Veritone's Cognitive Media Platform (CMP) is unique in the audio market, using cognitive computing to intelligently preserve audio (and video) content and make it searchable by keyword, all in near-real-time. For radio, this platform can analyse and store every word spoken into a microphone, offering verification of brand mentions, for example, and native advertising spoken content, verifying advertiser agreements that would be otherwise difficult to do, and potentially unlocking new value. For radio, the archiving also opens the door to repurposing on-the-air segments and smartly redistributing them.</p>
15:30 – 16:00	COFFEE BREAK - SUTTER I
16:00 – 17:00	KQED
 <p>▪ <b>Speaker:</b> <b>Tim Olson</b> <i>Chief Digital Officer</i></p>	<p>KQED Public Radio is one of the most popular non-commercial, community supported radio stations in the United States. KQED Public Radio features international content from NPR, PRI and the BBC and produces a wide-range of local series. The company is encouraging entrepreneurship and innovation with an in-house incubator – KQED Lab and other innovation efforts. The station runs “Brain Food” lunchtime sessions where speakers from local tech companies are invited to give an overview of their products or services. KQED Lab is part of the station's three-year strategic plan, which has the overall goal of growing and deepening its relationship with its audience.</p>

17:00 – 18:00	<b>CUMULUS MEDIA &amp; WESTWOOD ONE</b>
 <p>▪ <b>Speaker:</b> <b>Pierre Bouvard</b> <i>Chief Insights Officer</i></p>	<p>Cumulus is the second largest operator of radio stations in the United States and Westwood One is the advertising sales arm of Cumulus Media and a multi-platform provider of sports, music, news, spoken word, and digital audio content. The company is very active in digital innovations and data partnerships to attract ad dollars from digital advertisers to radio. Westwood One recently rolled out the NextRadio app – the first interactive audience measurement tool for over-the-air FM radio advertising campaigns. They were also the first radio company to launch a data management platform with the Nielsen Marketing Cloud. They recently consolidated all their digital assets in radio, digital and social under the so-called Cumulus Digital C-Suite platform, which the company describes as “a comprehensive portfolio of digital marketing solutions.”</p>


**Evening at leisure**

**DAY 03: 24/10/2017 (TUE)**

Meeting venue: San Francisco **MARRIOTT UNION SQUARE** (480 Sutter Street) – meeting room **SUTTER III**

09:00 – 10:00	<b>NIELSEN AUDIO &amp; NIELSEN MARKETING CLOUD</b>
 <p>▪ <b>Speakers:</b> <b>David Chipman</b> <i>Senior Vice President, Sales Director</i> <b>Bruno Furnari</b> <i>Vice President Product</i></p>	<p>Nielsen measures audio in the U.S. and makes it easier for advertisers to effectively value the medium and help determine its rightful place in the media planning mix. Portable people’s meters are used in 48 of the largest markets in the U.S. Nielsen also uses paper listening logs in more than 225 large and small markets. Nielsen Digital Audio measurement leverages census-based data collection, demographic information from leading third-party data providers and Nielsen’s measurement panels. Nielsen also follows on-demand and linear audio. Nielsen Scarborough provides detailed demographic and qualitative profiles of podcast listeners, and advertisers can connect with the fans of top celebrity podcast authors via Nielsen N-Score and Fanlinks. Nielsen is also incorporating its streaming measurement technology to track actual podcast consumption rather than just downloads.</p> <p>Developed from Nielsen's eXelate acquisition, the Nielsen Marketing Cloud empowers brands, agencies and media companies to connect more deeply with customers by combining Nielsen's data, analytics, media planning, marketing activation and data management platform (DMP) capabilities in a single cloud platform. Nielsen Marketing Cloud clients gain exclusive access to granular Nielsen data. Marketing outcomes include a deeper understanding of consumers, more effective one-to-one messaging across devices, and ROI analysis and campaign optimization capabilities.</p>
10:00 – 11:00	<b>OTTO RADIO</b>
 <p>▪ <b>Speakers:</b> <b>Reenita Malhotra Hora</b> <i>Vice President of Programming &amp; Audience Development</i></p>	<p>Otto Radio works like Pandora for podcasts and news, using listeners’ interests and listening habits to find stories they will love. It curates everything with the push of a button, automatically tailoring broadcasts streams and on demand content to a listener’s tastes, context and preferred length. Otto Radio is one of the fastest-growing news app. It has raised \$4M in funding to date from investors such as Samsung. Otto Radio has launched a new Themed Station feature within their platform, which allows users to create streaming radio stations dedicated to virtually any topic or theme. This new capability to explore a single subject on a deeper level complements the existing Radio YOU product that generates playlists based on a combination of each listener’s unique interests.</p>
11 :00 – 11:30	<b>COFFEE BREAK - SUTTER I</b>



11:30 – 12:30	<b>BRAVE SOFTWARE &amp; BASIC ATTENTION TOKEN</b>
 <p>▪ <b>Speaker:</b> <b>Brendan Eich</b> <i>Chief Executive Officer</i></p>	<p>Blockchain technology promises to change and improve various aspect of people's lives, specifically in the areas where it is important to process, track, record, store and securely verify transactions of information, e.g. finance, property or intellectual rights, stock, personal data, etc. Media and advertising is one of areas where blockchain technology could be deployed. According to many voices in the industry, digital advertising market is filled with middlemen and fraudsters, hurting users, publishers and advertisers. The Basic Attention Token (BAT) was developed to address it using blockchain. BAT, an ERC20 token built on top of Ethereum, will be the token of utility in a new, decentralized, open source and efficient blockchain-based digital advertising platform.</p>
12:30 – 13:30	<b>LUNCH - SUTTER I</b>
13:30 – 14:30	<b>TENCENT</b>
 <p>▪ <b>Speaker:</b> <b>Trista Wang</b> <i>Director of Business Development</i></p>	<p>Tencent is in top 10 of the world's largest companies and in top 5 of the largest internet companies in the world, as well as the largest gaming company in the world. Its many services include social network, messengers, payments, music streaming services, web portals, e-commerce, mobile games, smartphones, and multiplayer online games. Offerings in China include the well-known instant messenger Tencent QQ and one of the largest web portals, QQ.com. Its mobile chat service, WeChat, has helped bolster Tencent's continued expansion into smartphone services. In 2014, Tencent established exclusive in-China distribution agreements with several large music producers, including Sony, Warner Music Group and YG Entertainment, and in 2017 it signed a deal with Universal Music Group to stream its music in China.</p>
14:30 – 15:30	<b>IHEARTMEDIA</b>
 <p>▪ <b>Speaker:</b> <b>Andrew Jeffries</b> <i>Senior Vice President of Programming and Operations</i></p>	<p>iHeartMedia is a leading global media and entertainment company specializing in radio, digital, outdoor, mobile, social, live events and on-demand entertainment. The company is the largest radio broadcaster in the United States. It owns and operates 858 broadcast radio stations, serving more than 150 markets. iHeartMedia's impressive digital assets include thousands of station and show websites, more than 100 million registered iHeartRadio users, and nearly 85 million followers across its social network. The company vision includes its multi-platform approach – broadcast, data, digital, live, social, mobile, podcast, video game consoles, and in-car infotainment. iHeartMedia has been steadily redefining itself as an integrated digital entity and continues to extend the reach of its traditional radio brands.</p>
15:30 – 16:00	<b>COFFEE BREAK - SUTTER I</b>
16:00 – 17:00	<b>PODCAST ONE</b>
 <p>▪ <b>Speaker:</b> <b>Norman Pattiz</b> <i>Founder &amp; Executive Chairman</i></p>	<p>PodcastOne is the largest advertiser-supported, on-demand digital audio network in the US. With a 360-degree solution, including content creation, brand integration and distribution, PodcastOne sees more than 1.5 billion downloads annually, across 350 episodes produced weekly. PodcastOne's 200 podcasts deliver more than 400 million monthly impressions for advertisers. Network podcasts have a maximum of four advertisements in any given hour. The network offers recorded and live host endorsements for highly targetable audience, and can integrate brands into the content of the show. PodcastOne's Ad Insertion technology allows geo-targeting and copy-split capabilities, as well as facilitation of time sensitive campaigns.</p>

17:00 – 18:00	<b>NAPSTER</b>
 <p>▪ <b>Speaker:</b>  <b>Ken Murphy</b>  <i>Senior Vice President - Strategic Partnerships and Process</i></p>	<p>Napster's streaming music services give members ad-free access to millions of songs. Expert team of editors create a curated music experience including new original content including videos, playlists, reviews, and radio stations – anytime and anywhere. The Napster brand has seen many changes over the years, with several acquisitions taking place since 2008. Since acquiring Napster, Rhapsody has continued to develop the product and focused on reinforcing the brand in Europe. Napster offers radio and music companies back-end technologies to launch and develop music on-demand services. The two new iHeartRadio's subscription plans: iHeartRadio Plus and iHeartRadio All Access are powered by Napster. Napster has also partnered with Rakuten, Inc., a Japanese internet services company, towards increasing the music offerings of the firm's on-demand music streaming platform.</p>

## Evening at leisure

# DAY 04: 25/10/2017 (WED)



## Travelling around San Francisco Bay Area and Silicon Valley

08:15	<b>Meeting in the Marriott hotel lobby – BUS TRANSFER TO TUNEIN</b>
09:15 – 10:15	<p><b>TUNEIN</b>  <u>Address:</u> 210 King Street, 3rd floor - San Francisco, CA 94107</p>
 <p>▪ <b>Speakers:</b>  <b>Tracy Leeds Kaplan</b>  <i>Senior Director of Content</i>  <b>Albert Chen</b>  <i>Director of Business Development</i>  <b>Jon Keilson</b>  <i>Director of Product</i></p>	<p>The audio streaming service TuneIn currently has more than 75 million active monthly users across the world and is the biggest radio aggregator working with global broadcast partners. TuneIn started as an aggregator of radio stations, it now also offers premium subscriptions, news, sports leagues, audiobooks, podcasts, etc. TuneIn has over 120,000 owned &amp; operated and partner radio stations and more than 5.7 million on-demand programs stemming from every continent, and is available for free across 200 platforms and connected devices.</p>
10:15	<b>TRANSFER TO APPLE</b>
11:30 – 13:00	<p><b>APPLE</b>  <u>Address:</u> 4, Infinite Loop - Cupertino, CA 95014</p>
 <p>▪ <b>Speakers:</b>  <b>James O. Boggs</b>  <i>Global Head of Podcasts &amp; Internet Radio, iTunes</i>  <b>Lauren Osen</b>  <i>Americas Editor, Apple Podcasts</i>  <b>Steve Wilson</b>  <i>Consumer Marketing, Apple Podcasts</i></p>	<p>Apple Inc. is an American multinational technology company that designs, develops, and sells consumer electronics, computer software, and online services.</p> <p>Apple Music – the service has more than 20 million subscribers, combining the iCloud Music Library and the Apple Music streaming catalogue, including a live, 24/7 radio station Beats 1. Apple also incorporates original video content and exclusive music releases.</p> <p>Podcasts – Apple accounts for around 70% of all podcast consumption. The company announced that they will open up in-episode analytics enabling content producers to see when and how long people listen – what they skip over and importantly if/when they stop. This will bring a much-needed detailed data about podcast listening.</p>

<b>Jacob Bronstein</b> <i>Consumer Marketing Manager, Apple News, iBooks, Apple Podcasts</i> <b>Buddy Judge Carvey</b> <i>Product Marketing, Apple Music</i> <b>Phillip Vasquez</b> <i>Product Marketing Manager, Apple Music</i>	HomePod – smart speaker with Siri and Apple Music integration. A direct competitor to Amazon Echo and Google Home is scheduled for release in December 2017.
<b>13:00 – 13:45</b>	<b>LUNCH AT APPLE</b>
<b>13:45 – 14:45</b>	<b>APPLE</b> - Continuation of the meetings
<b>14:45 – 15:45</b>	<b>VISIT OF THE APPLE STORE</b>
<b>15:45 – 16:45</b>	<b>TRANSFER BACK TO SAN FRANCISCO</b>
<b>19:30 – 23:00</b>	<b>Meeting in the Marriott hotel lobby – BUS TRANSFER TO DINNER</b> <b>CLOSING DINNER: SESSIONS AT THE PRESIDIO</b> <u>Address:</u> 1 Letterman Drive - Building D, Suite 150 - San Francisco, CA 94129

## DAY 05: 26/10/2017 (THU)

### Travelling to Oakland

<b>08:45</b>	<b>Meeting in the Marriott hotel lobby – BUS TRANSFER TO PANDORA</b>  Please check out of your room if you are leaving for the airport after the last meeting.
<b>10:00 – 12:00</b>	<b>PANDORA</b> <u>Address:</u> 2101 Webster St 1650, Oakland, CA 94612
 <b>Speakers:</b> <b>Doug Sterne</b> <i>Vice President, Audio Development</i> <b>Dave Smith</b> <i>Senior Vice President, Monetisation &amp; Revenue Operations</i> <b>Elaine Theios</b> <i>Director, Ad Product Strategy</i> <b>Grace Kao</b> <i>Senior Director, Sales Marketing</i>	Pandora is the biggest personalised music streaming and recommendation service, as well as a pioneer and leading music streaming business in the United States. It has over 89.4 million monthly active listeners (one-quarter of the U.S. population). This allows Pandora to collect over 1 billion data points every day. Pandora is available across 1,800+ connected devices and 190+ car models and listeners spend on average 20.7 hours per month with Pandora. Despite the launch of Pandora Premium, ad supported listening remains the biggest part of the business. The company recently announced plans to enter the programmatic audio market in Q4 2017. New developments also include a partnership with Foursquare thanks to which advertisers can now get data about whether their campaigns drive foot traffic.
<b>12:15 – 13:30</b>	<b>LUNCH AT HOPSCOTCH</b> <u>Address:</u> 1915 San Pablo Ave, Oakland, CA 94612
<b>13:30+</b>	<b>END OF THE TRIP</b>

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