

AGENDA

egta.

RADIO STUDY TRIP TO

SAN

FRANCISCO

BAY AREA

22/10/2017 (SUN) – 26/10/2017 (THU)

## ABOUT THE TRIP

This year 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 20 business leaders from egta radio/audio 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, synchronised radio and digital campaigns, innovations in advertising formats, measurement and data strategies, 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 the advertising and business capital of the U.S. - New York. Please contact egta for more information.



*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>19:00</b>	<b>OPENING DINNER</b> Scala Bistro 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 – meeting room SUTTER III**

<b>09:00 – 10:00</b>	<b>EDISON RESEARCH</b>
 <p>▪ <b>Speaker:</b> <b>Larry Rosin</b> <i>Co-Founder &amp; President</i></p>	Larry Rosin has been involved with media for over 20 years, his specialty is audience research. Rosin is recognised as one of the leading thinkers in the field, and advises many of the world's largest media companies. Rosin founded Edison Research in 1994. It provides strategic information and analysis to increase understanding of audiences. Edison has distinguished itself within the media research community through several industry studies on radio, the Internet, and the music industry, including the Infinite Dial, Share of Ear, etc.
<b>10:00 – 11:00</b>	<b>AMPLIFI MEDIA</b>
 <p>▪ <b>Speaker:</b> <b>Steven Goldstein</b> <i>Founder &amp; CEO</i></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 is a digital audio agency which develops content and strategy to create engaging, viral audio-casts.
<b>11:00</b>	<b>COFFEE BREAK - SUTTER I</b>

11:30 – 12:30	<b>CUMULUS AND WESTWOOD ONE</b>
 <p><b>Speaker:</b> <b>Pierre Bouvard</b> <i>Chief Insights Officer at Cumulus Media &amp; Westwood One</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 under the so-called Cumulus Digital C-Suite platform, which the company describes as “a comprehensive portfolio of digital marketing solutions.” C-Suite is being released in 90 markets across the U.S., and with it, local Cumulus Media account executives will be able to offer clients advertising solutions in radio, digital and social.</p>
12:30	<b>LUNCH - SUTTER I</b>
13:30 – 14:30	<b>KQED</b>
 <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>
14:30 – 15:30	<b>VERITONE</b>
 <p><b>Speaker:</b> <b>Drew Hilles</b> <i>Senior Vice President</i></p>	<p>Veritone is the leading 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	<b>COFFEE BREAK - SUTTER I</b>
16:00 – 17:00	<b>JELLI</b>
 <p><b>Speaker:</b> <b>Michael Dougherty</b> <i>Founder &amp; CEO</i></p>	<p>Jelli operates as a cloud-based advertising company for the radio market in the United States. 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>





17:00 – 18:00	<b>INSTREAMATIC</b>
 <p>▪ <b>Speaker:</b> <b>Stas Tyshinskiy</b> CEO &amp; Co-Founder</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>

Evening at leisure

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

Meeting venue: San Francisco **MARRIOTT UNION SQUARE** – meeting room **SUTTER III**

	<b>SPOTIFY</b>
 <p>▪ <b>Speaker:</b> <b>Les Hollander</b> Global Head of Ad Product &amp; Partner Sales Position</p>	<p>Spotify is originally a European company which has achieved a great success in the United States both for premium and ad supported tiers of streaming music. Spotify is also expanding its footprint for podcasts, showing increased traction for growing the audio content offerings to stand alongside music.</p> <p>Our meeting will focus on the audio advertising and monetisation part of the Spotify business, promotion of audio advertising to the brands and agencies, data, ad technologies and strategies to grow the online audio sector.</p>
	<b>IHEARTMEDIA</b>
 <p>▪ <b>Speaker:</b> <b>Andrew Jeffries</b> Senior Vice President of Programming and Operations</p>	<p>iHeart Media is the largest radio broadcaster in the United States. The company has been steadily redefining itself as an integrated digital entity and continues to extend the reach of its traditional radio brands, online platform and music on demand offer. For example, the recently launched SmartAudio feature of iHeart's programmatic solution enables advertisers to mine its digital data from more than 100 million registered iHeartRadio listeners, along with second and third-party digital data, consumer and behavioural resources and social networks, to create audience segment profiles of interest.</p>



Evening at leisure

More appointments to be confirmed soon. Meetings pending confirmation:

- **Amazon** - in the context of Amazon Music, Echo and Alexa AI voice-activated technologies
- **Influ2** - solutions to make B2B marketing accountable and efficient, building up on recent developments in machine learning, data and behavioural targeting.
- **E.W. Scripps** – serves audiences and businesses through a growing portfolio of television, radio and digital media brands. Very active in audio on demand filed, since 2015 owner of one of the biggest podcast distribution and monetisation platform in the US – Midroll Media.
- **Sizmek** - offers campaign management deployment, including programmatic for digital audio.
- Technology partners with data collection and matching solutions.
- Experts on the application of blockchain for media and advertising.
- A radio broadcaster with an advanced podcast strategy.

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

## Silicon Valley



08:00	<b>Meeting in the Marriott hotel lobby - bus transfer to the meetings in the Silicon Valley &amp; San Francisco area</b>
08:45 – 10:00	<b>TUNEIN</b> Address: San Francisco office
 <p>▪ <b>Speakers:</b> <b>Kevin Straley</b> <i>Chief Content Officer</i> <b>Scott Parker</b> <i>Vice President Marketing</i></p>	<p>The audio streaming service TuneIn currently has more than 60 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 will share more about the recent innovations it has brought to the market as well information about their business model and cooperation with broadcasters.</p>
10:00	<b>TRANSFER TO APPLE</b>
11:30	<b>APPLE</b> Address: Cupertino
 <p>▪ <b>Speakers:</b> <b>James O. Boggs</b> <i>Global Head of Podcasts &amp; Internet Radio, iTunes</i></p> <p><i>Other names to be confirmed</i></p>	<p>Topics to be addressed:</p> <p><b>Apple Music</b> – 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><b>Podcasts</b> - 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> <p><b>AI and Home Pod</b> – Voice control and smart homes are the technology of the future. Equipped with Siri and connected to Apple Music, Home Pod serves as a music ecosystem that register user’s preferences and plays any song.</p>
13:00	<b>LUNCH WITH APPLE</b>
13:45 – 14:45	<b>APPLE</b> Continuation of the meeting
14:45	<b>VISIT OF THE APPLE CAMPUS</b>
20:00	<b>CLOSING DINNER</b>

### More appointments to be confirmed soon. Meetings pending confirmation:

- **Google** - in the context of Google Play Music, Google Home and ad business.
- **Facebook** - in the context of Live Audio, their ad strategy, data and music business development.
- **Tesla, Uber** or **Lyft** - in the context of self-driving cars and partnership opportunities with audio actors.

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

## Oakland

08:45	<b>Meeting in the Marriott hotel lobby &amp; bus transfer to the meetings</b>  Please check out of your room if you are leaving for the airport after the last meeting.
10:00 – 12:00	<b>PANDORA</b> Address: Oakland office
 <b>Speaker:</b> <b>Doug Sterne</b> <i>VP Audio Development &amp; Strategy</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. Despite the launch of Pandora Premium Ad-supported free, 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.
12:15	<b>STUDY TRIP DEBRIEF &amp; LUNCH</b> Address: Oakland
13:00+	<b>END OF THE TRIP</b>