



BORRELL

Tomorrow's Media, Understood Today

www.BorrellAssociates.com

Sales Managers' Workshop

ICMA
Prague
November 2013

»» Developing a Solid Data Driven Sales Plan

GOALS

- Increase Market Share
- Take advantage of shifts occurring in media consumption that are driving a shift in media spending
- Efficiently deploy your sales resources against the highest potential customer segments
- Set appropriate goals
- Methodically work your prospecting list
- Use marketing to support sales efforts and turn prospects into leads
- Develop a highly focused sales plan and segment specialist



»» About Borrell Associates

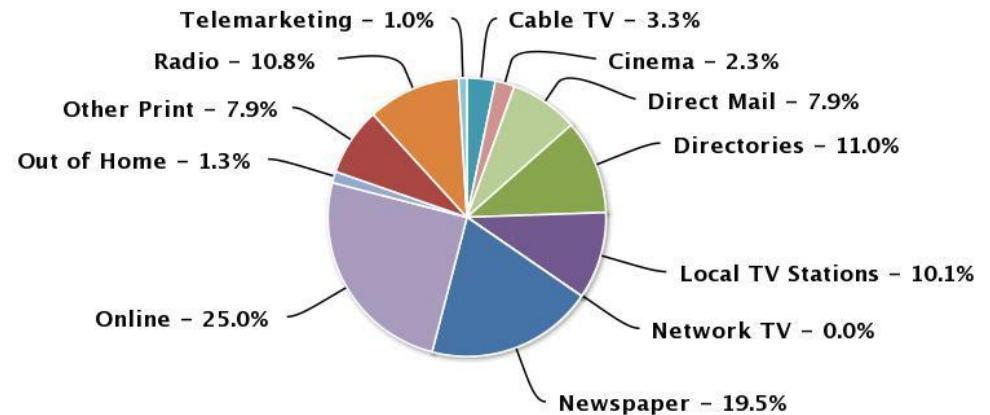
- Track and forecast local ad spending across any market in the **U.S., Canada and the U.K.**, down to the **county or province level.**
- Help clients gauge the levels of advertising and marketing expenditures in their markets by any of **100 business categories across 12 media types.**
- **We help media companies identify their market share and consult on best-practices to help them achieve that share.**

Step 1: Identify Your Market Share

Media	From Inside	Share
Cable TV	\$11,388,600	3.3%
Cinema	\$7,810,400	2.3%
Direct Mail	\$27,405,100	7.9%
Directories	\$37,992,100	11.0%
Local TV Stations	\$34,987,600	10.1%
Network TV		
Newspaper	\$67,350,500	19.5%
Online	\$86,330,500	25.0%
Out of Home	\$4,551,500	1.3%
Other Print	\$27,330,500	7.9%
Radio	\$37,431,800	10.8%
Telemarketing	\$3,298,500	1.0%
Total	\$345,877,100	100.0%
From Inside "Non-Ad" Marketing	\$721,787,900	208.7%

\$ in Actuals

2013 Media Category Share



Market Totals in Duval, FL

Based on R2 2013 data - (c) 2013 Borrell Associates

Use the ad spending data to understand market potential (share)

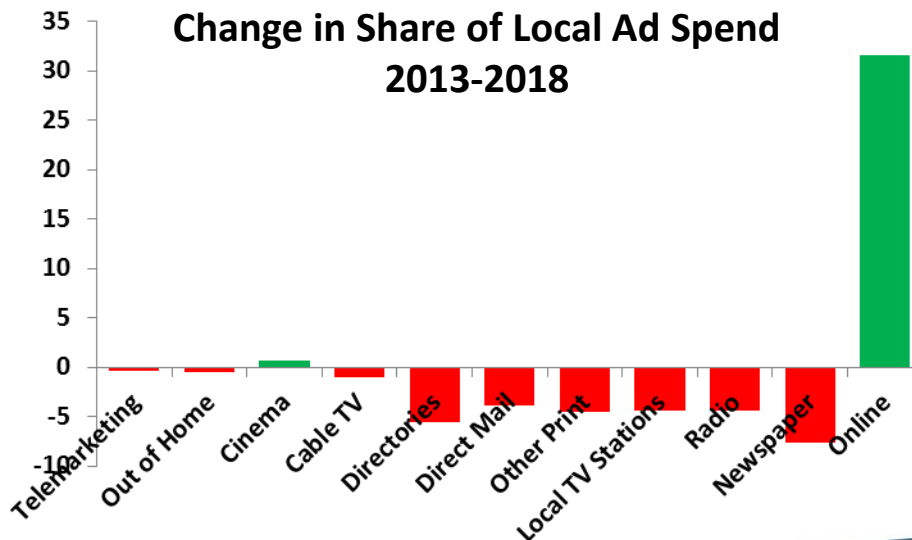


Step 2: Identify the **media** that are forecasted to lose the most share, ad spending, and revenue in your target market/footprint.

Media Losing the Most Share, 2013 – 2018

Medium	Share Pt. Δ	\$ Δ (\$ actual)	% \$ Δ
Newspaper	(7.7)	+\$3,167,000	+4.7%
Directories	(5.6)	(\$5,784,000)	(15.2%)
Other Print	(4.5)	(\$6,798,000)	(33.1%)
Local TV Stations	(4.5)	(\$1,102,000)	(3.3%)
Radio	(4.4)	+\$1,165,000	+3.1%

**Change in Share of Local Ad Spend
2013-2018**



Sample market



Step 3: Identify the **business categories** that are shifting the most out of those competitive media categories

Largest Decrease in Spending on Local Other Print, 2013 – 2018

Category	2013 \$ Spend	Share of 2013 Local Ad Budget	2018 \$ Spend	Share of 2018 Local Ad Budget	\$ Change	Share Pt. Δ
General Merchandise Stores	\$7,612,000	10%	\$5,847,000	6%	(\$1,765,000)	(4.1)
Food Stores-Retail	\$2,463,000	17%	\$1,733,000	6%	(\$730,000)	(10.6)
Telecommunications Services	\$1,624,000	18%	\$1,202,000	10%	(\$422,000)	(7.7)
Government	\$1,294,000	10%	\$909,000	4%	(\$385,000)	(5.3)
Automotive Sales	\$1,653,000	4%	\$1,274,000	1%	(\$379,000)	(2.9)
Furniture Sales	\$388,000	3%	\$134,000	1%	(\$254,000)	(2.4)
Retail Home Improvement	\$905,000	14%	\$659,000	6%	(\$246,000)	(8.1)
Credit and Mortgage Services	\$857,000	5%	\$638,000	1%	(\$219,000)	(3.5)
Travel Services	\$243,000	14%	\$44,000	7%	(\$199,000)	(6.3)
Contractors-Specialty	\$666,000	18%	\$536,000	12%	(\$130,000)	(6.3)

Other Print



Step 3: Identify the **business categories** that are shifting the most out of those competitive media categories

Largest Decrease in Spending on Local Directories, 2013 – 2018

Category	2013 \$ Spend	Share of 2013 Local Ad Budget	2018 \$ Spend	Share of 2018 Local Ad Budget	\$ Change	Share Pt. Δ
HVAC Installation and Repair	\$19,282,000	75%	\$18,482,000	67%	(\$800,000)	(8.5)
Legal Services	\$1,946,000	66%	\$1,419,000	53%	(\$527,000)	(13.5)
Furniture Sales	\$525,000	4%	\$176,000	1%	(\$349,000)	(3.3)
Florists	\$481,000	98%	\$196,000	97%	(\$285,000)	(1.2)
Contractors-Specialty	\$1,419,000	39%	\$1,168,000	26%	(\$251,000)	(12.8)
Electric Power Utilities	\$682,000	8%	\$447,000	4%	(\$235,000)	(3.2)
Automotive Parts and Supplies	\$1,076,000	59%	\$849,000	41%	(\$227,000)	(17.7)
Retail Tires	\$801,000	70%	\$592,000	57%	(\$209,000)	(12.9)
Retail Fabric Sales	\$206,000	95%	\$16,000	94%	(\$190,000)	(0.8)
Retail Home Improvement	\$820,000	13%	\$640,000	6%	(\$180,000)	(7.0)

Directories



Step 3: Identify the **business categories** that are shifting the most out of those competitive media categories

Largest Decrease in Spending on Local Cable TV, 2013 – 2018

Category	2013 \$ Spend	Share of 2013 Local Ad Budget	2018 \$ Spend	Share of 2018 Local Ad Budget	\$ Change	Share Pt. Δ
Furniture Sales	\$829,000	7%	\$443,000	3%	(\$386,000)	(4.1)
Video Tape Rental Centers	\$17,000	7%	\$9,000	9%	(\$8,000)	+2.0
Travel Services	\$6,000	0%	\$2,000	0%	(\$4,000)	(0.0)
Other Medical Facilities	\$7,000	1%	\$5,000	1%	(\$2,000)	(0.0)
Retail Floor Coverings	\$11,000	3%	\$9,000	3%	(\$2,000)	(0.1)
Television Broadcasting Stations	\$17,000	2%	\$15,000	2%	(\$2,000)	(0.3)
Movie Theaters	\$37,000	6%	\$35,000	7%	(\$2,000)	+1.4
Office Equipment and Supplies	\$55,000	4%	\$54,000	4%	(\$1,000)	(0.9)
Retail Toys Game Hobbies	\$25,000	5%	\$24,000	6%	(\$1,000)	+0.4
Accountants/Bookkeepers	\$4,000	2%	\$4,000	2%	\$0	(0.2)

TV

Step 4: Identify the business categories that are growing the most in digital

Largest Increase in Spending on Local Online, 2013 – 2018

Category	2013 \$ Spend	Share of 2013 Local Ad Budget	2018 \$ Spend	Share of 2018 Local Ad Budget	\$ Change	Share Pt. Δ
Automotive Sales	\$20,118,000	50%	\$78,433,000	79%	\$58,315,000	+28.7
Credit and Mortgage Services	\$5,018,000	28%	\$33,273,000	68%	\$28,255,000	+40.4
General Merchandise Stores	\$16,451,000	22%	\$37,836,000	39%	\$21,385,000	+17.1
Food Stores-Retail	\$3,633,000	25%	\$18,580,000	66%	\$14,947,000	+41.5
Furniture Sales	\$3,874,000	32%	\$12,520,000	77%	\$8,646,000	+45.0
Financial Services	\$1,121,000	31%	\$8,684,000	73%	\$7,563,000	+41.5
Government	\$2,303,000	17%	\$9,470,000	45%	\$7,167,000	+27.8
Retail Home Improvement	\$1,462,000	22%	\$6,724,000	58%	\$5,262,000	+36.1
Pharmacies	\$1,074,000	19%	\$3,881,000	39%	\$2,807,000	+19.7
Computer-related Services	\$872,000	56%	\$3,663,000	84%	\$2,791,000	+27.8



These two lists combined point at the opportunity

Furniture Sales
Retail Home Improvement



»» What's Next?

- Buy a business list of these categories (including the number of employees per business) or marry up the data to an existing list and use this as your prospecting list.
- Prioritize based on current customers relationships, new business potential, size etc.
- Set appropriate goals based on your revenue compared to market share.



Create Category Specific Sales Plans

- Schedule weekly tracking appointments.
 - Monitor the “no’s” and the reason a sale wasn’t made.
 - Categorize no sales and adjust appropriately.
 - Shifts may need to be made based on the reason of the “no.” (Salesperson, price, product or terms.)
- Support sales with marketing.
 - Find out where they congregate, what they read, events they attend, etc.
 - Be part of their conversation in social media.

Use spending data to start a conversation and get in the door.