

Colorado Wildlife Council

June Meeting
2023



COLO
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COU

Date Issued:

June 2023

Agenda

- 01 **Creative Updates**
- 02 **Paid Media Reco**
- 03 **Rockies Partnership Updates**
- 04 **Action Items**

Creative

Updates

Production Updates

- R&R met with the creative subcommittee to review production companies
- Subcommittee moved forward with Futuristic Films as the production company – a new production company for the council than in years past
- Futuristic Films is a Denver based production company



| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---------------------|---|--|-------------------------|---|------------------------|----------|
| May 21 | 22 | 23 | 24 | 25 | 26 Award / SOW | 27 |
| 28 | 29 Memorial Day - Holiday | 30 Director Kick Off Call Casting Specs Approved Casting Prep | 31 Casting - Round 1 | June 1 (PM) Casting Rnd1 Link | 2 Casting - Round 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Location Scouting | | | | Additional Director Scouting / Final Prep | | |
| Casting - Round 2 | (AM) Casting Rnd 2 Link Agency Selects | Client Reviews Casting | Art Dept Prep | | | |
| | | | Talent Approval | Wardrobe Prep | | |
| | | | | Location Approval | | |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| Additional Director | Wardrobe Prep | | Shoot | | | |
| | Art Dept Prep | | | | | |
| | Tech Scout | Wardrobe Fitting | | | | |
| | | PrePro Meeting | | | | |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| Shoot | | Load/Transcode | | Edit_30s | | |
| | Juneteenth - Holiday | | | | | |



| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|-----------------------------------|---------------------------------|----------------------------------|------------------------|---|----------|
| 25 | 26 Edit_30s Post For Agency | 27 Agency Review Edit_15s | 28 Post :15s For Agency | 29 Agency Revisions | 30 Post For Client Receive :15 Feedback | July 1 |
| 2 | 3 4th of July Break_FF Closed | 4 | 5 Client Revisions & Cutdowns | 6 | 7 Post For Client | 8 |
| 9 | 10 Client Review | 11 | 12 Final Revisions & :06s | 13 | 14 Post For Lock | 15 |
| 16 | 17 Picture Lock | 18 Prep For Color and Audio | 19 Color Correction | 20 Audio Mix | 21 | 22 |
| 23 | 24 Repo_All Versions | 25 Versioning and Conform | 26 Post FFA | 27 Delivery | 28 Edit_LF | 29 |

FILM • POST

July 2023 - August 2023

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|--------------------|--------------------------------|------------------------|---|----------------------|----------|
| 30 | 31 Edit_LF | August 1 Post For Agency | 2 Agency Review | 3 Agency Revisions | 4 Post For Client | 5 |
| 6 | 7 Client Review | 8 | 9 Client Revisions | 10 Post For Client | 11 Client Review | 12 |
| 13 | 14 Picture Lock | 15 Prep for Color and Audio | 16 Color Correction | 17 Audio Mix Versioning and Conform Post FFA | 18 Delivery | 19 |

Paid Media

FY23/24 Recommendation

Channel Strategy

Target Audiences

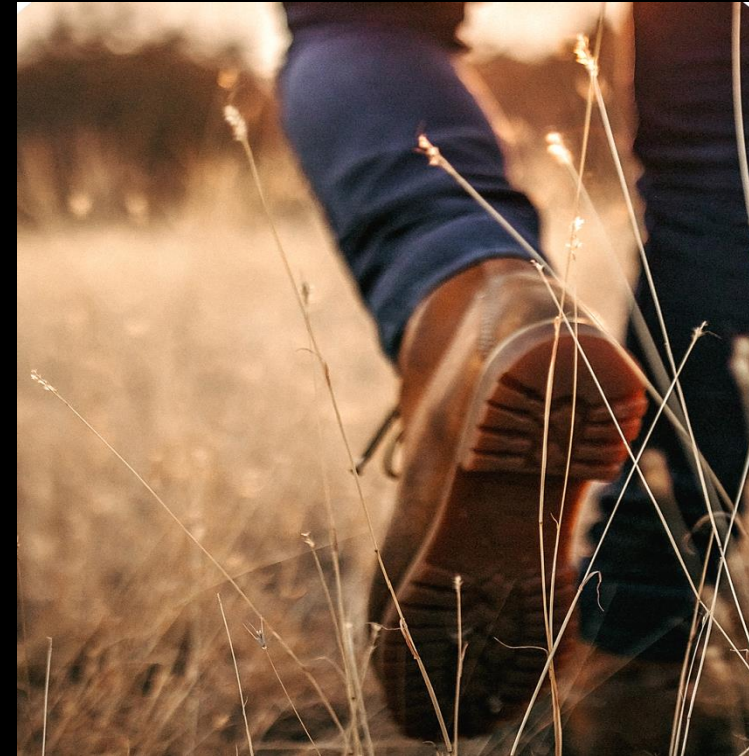
Primary Audience



Adventurous Environmentalist

- Adults 18 to 44
- Outdoorsy audience who enjoys hiking, fishing and camping
- More likely to be female
- Leans democratic and liberal
- Falls in higher income bracket

Secondary Audience



Hunter Adjacent

- Adults 18 to 29
- Not active hunters, but indifferent to or supportive of hunting
- More likely to be male
- Range on political views; majority are independents
- Falls in a lower income bracket

Media Consumption Behaviors

Trends in media usage across both the **Adventurous Environmentalist** and the **Hunter Adjacent** audiences were relatively similar with two notable highlights:

- **Internet** and **OOH** reported the **heaviest** consumption
- While TV showed light usage, this is still a viable channel for reaching the Advocates audience (through live sports and specials)

Platform specifics

- While specific digital/social platforms most all indexed in the moderate range, those in **bold** had the highest target % and index (**Video Streaming Services, Google** and **Spotify**)
- Note that both audiences had a high affinity for **Colorado Rockies** consumption (over 40%)

| | |
|--|-------------------|
| | Heavy (150+) |
| | Moderate (85-149) |
| | Light (<84) |

Source: Scarborough, Adults 18-44 & AE Hobbies;
Adults 18-29 & HA Hobbies
Denver, CO 2022 & 2021 Release 1

Media Quintiles

| | AE | HA |
|----------|----------|----------|
| Internet | Heavy | Heavy |
| TV | Light | Light |
| Radio | Light | Light |
| OOH | Heavy | Moderate |
| Print | Moderate | Light |

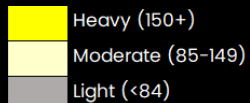
Platform Specifics

| | AE | HA |
|--------------------|-------------------|-------------------|
| Amazon Prime Video | 64.5%, 129 | 65.9%, 131 |
| Disney+ | 48.3%, 143 | 47.8%, 141 |
| Facebook | 34.2%, 98 | 29.7%, 85 |
| Google | 45.7%, 107 | 41.9%, 98 |
| HBO Max | 27.8%, 137 | 24.2%, 119 |
| Hulu | 55.2%, 139 | 68.3%, 173 |
| Instagram | 27.2%, 126 | 22.6%, 105 |
| Netflix | 83.6%, 121 | 83.9%, 121 |
| Pandora | 21.5%, 103 | 11.3%, 54 |
| Reddit | 17.8%, 177 | 21.1%, 210 |
| Snapchat | 14.4%, 154 | 16.5%, 177 |
| Spotify | 50.8%, 163 | 58.5%, 187 |
| TikTok | 13.2%, 139 | 11.5%, 122 |
| Twitter | 16.0%, 117 | 18.3%, 133 |
| YouTube | 74.1%, 124 | 76.2%, 127 |

Media Consumption Behaviors – Spanish

Trends among Hispanics across both the **Adventurous Environmentalist** and the **Hunter Adjacent** audiences and language:

- **English Only** dominated all categories, whether in the home or away from home
- Of the approximate 20% and 18% (respectively) of Spanish/Hispanic origin, Spanish is **not** their dominant language
- While we could **test Spanish ads on audio platforms or display**, it is not necessary to deliver the message to this audience



Source: Scarborough, Adults 18-44 & AE Hobbies;
 Adults 18-29 & HA Hobbies
 Denver, CO 2022 & 2021 Release 1

Among Hispanics within the Target

| | AE | HA |
|---|-------------------|-------------------|
| Spanish/Hispanic Origin – Yes | 19.7%, 103 | 17.5%, 91 |
| Language Prefer to Speak – English Only | 7.9%, 117 | 9.6%, 141 |
| Language Prefer Away from Home – English Only | 8.4%, 113 | 11.2%, 150 |
| Language Speak Most in Home – English Only | 7.5%, 111 | 9.7%, 144 |
| Spanish Language Dominant – Yes | 7.1%, 84 | 4.0%, 47 |
| Spanish Language Dominant – No | 12.6%, 119 | 13.5%, 127 |

Platform Specifics for Hispanics

| | AE | HA |
|--------------------|-------------------|-------------------|
| Amazon Prime Video | 53.8%, 107 | 60.9%, 121 |
| Disney+ | 42.3%, 125 | 51.3%, 152 |
| Hulu | 54.8%, 138 | 83.3%, 211 |
| Netflix | 83.8%, 121 | 93.6%, 135 |
| Pandora | 31.5%, 150 | 26.6%, 127 |
| Spotify | 41.9%, 134 | 54.8%, 176 |
| YouTube | 79.5%, 133 | 86.2%, 144 |

Channel Strategy

Full-Funnel Omnichannel Approach

U P P E R

Maximize impressions via upper funnel media tactics:

(Broadcast TV, OOH, Video)

M I D

Mid-Funnel media tactics that will reinforce awareness:

(Social Media, Display, Rich Media, Streaming Audio, CO Rockies Sponsorship)

L O W E R

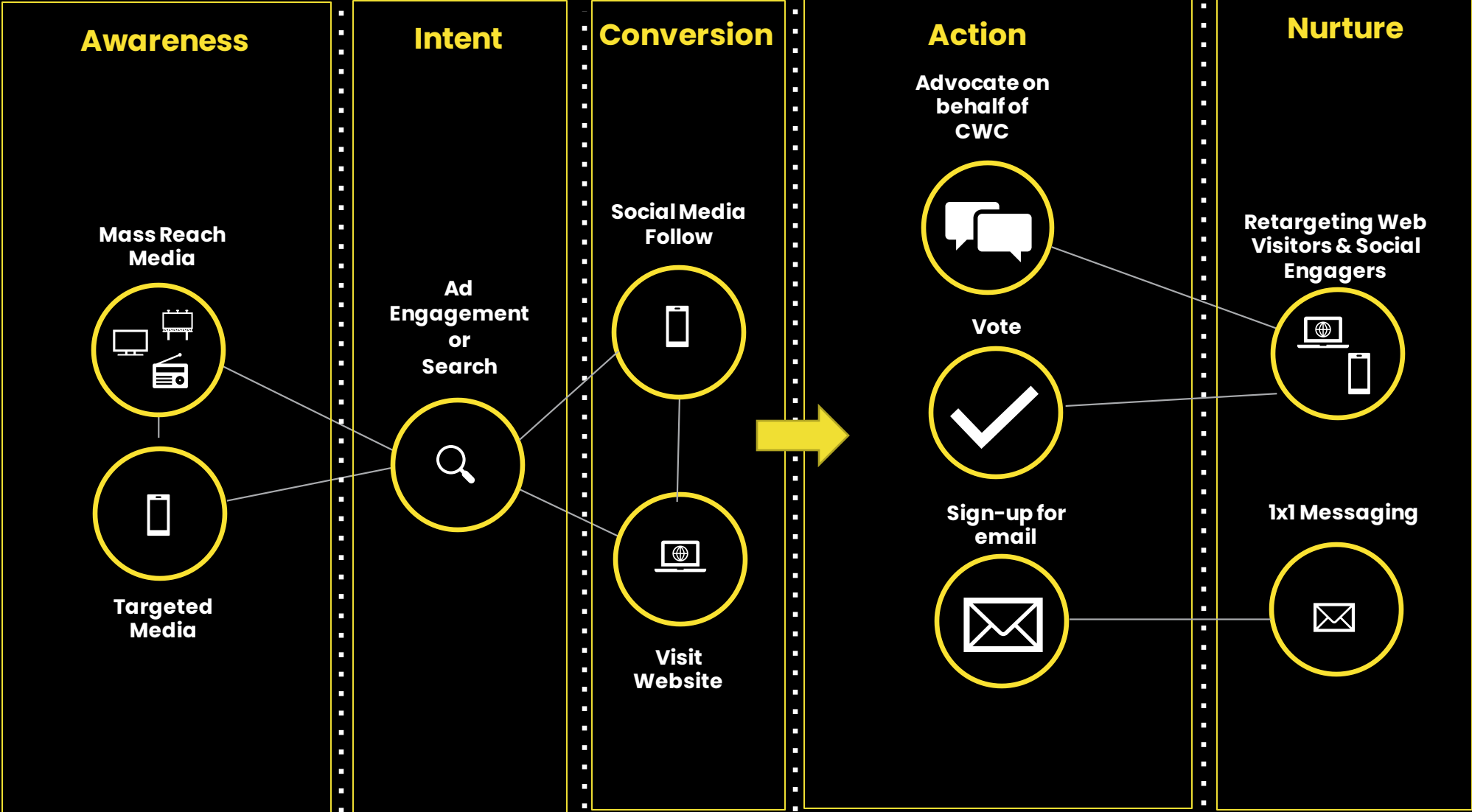
Lower-Funnel media tactics to encourage the target audience to explore the website:

(Email, Influencers)

Audience Journey

Objective:

Through traditional and digital media channels, increase awareness among the "Adventurous Environmentalist" and "Hunter Adjacent" audiences, paving the way for them to become advocates.



Paid Media

FY '23/'24 Recommendation

Media Objectives & Goals

- Campaign Objective
 - Increase **awareness** among the Adventurous Environmentalist and Hunter Adjacent audiences of the benefits of hunting and fishing for the state of Colorado.
- Measurable Goals
 - Increase education of the benefits of hunting and fishing measured by **impression delivery, video views and website visits.**
- Key Performance Indicators (KPIs)
 - Primary: reach, impressions, brand lift and annual tracker study
 - Secondary: clicks (CTR), video views (VCR) and website visits

Planning Parameters

| | |
|------------------|---|
| BUDGET | \$1,645,030 |
| TIMING | July 1, 2023 – June 30, 2024 |
| AUDIENCES | Adventurous Environmentalist Hunter Adjacent |
| TACTICS | Television OOH The Trade Desk YouTube Facebook/Instagram Reddit Snapchat TikTok Email |

Media Audiences

- **Adapting the CWC target audiences:** With the target audiences of the **Adventurous Environmentalist** (primary) and **Hunter Adjacent** (secondary and within the AE audience), we will optimize and fine tune the audience as the campaign gathers data and evolve this audience over time.
 - **Diversity & Inclusion:** Integrate specific BIPOC data segments into the media plan that reach diverse audiences that fall within the Adults 18-44 demo.
 - **New to Colorado:** Target those who fall within the AE audience but are new to Colorado.
 - **Outdoor:** Continue to target those who are interested in outdoor activities, but do not participate in hunting or fishing.
 - **Geo-targeting:** Target those near our downtown mural.
- **Stakeholder inclusion:** Remain visible among CWC's key stakeholders to ensure that we're remaining top-of-mind for our advocates. Reach them specifically within paid media efforts such as TV, OOH, social influencers, evergreen social, and earned efforts.
- **Growth:** Leverage lookalike and retargeting audiences based on past campaigns and website visitors.

Traditional Media

Television

TIMING

September 2023 – May 2024

TACTICS

75% Sports
25% Prime Programming

GEO

Denver DMA

SAMPLE PROGRAMS

Live CO Sporting Events, Saturday Night Live,
Masked Singer, Bachelor

Colorado Rockies Sponsorship



TIMING

July 1, 2023 – October 1, 2023*

*Remainder of 2023 Season that falls within FY

EXECUTIONS

- Mural
- In-stadium signage
 - L-bar
 - Outfield Wall Sign
- Video Board
 - :60 video to play on main video board
- Promotional Day
 - First pitch
 - Tote giveaway
- Digital
 - 2 social posts & 1 email blast

Average attendance per game (based on 2022): 32,467

Total attendance for 2022 season: 2,597,428

Ski Lift OOH

TIMING

Dec. 1, 2023 – March 31, 2024
(4 Months)

TACTICS

130 Chairs

GEO

Winter Park & Breckenridge



Light Rail Wrap



Static Bulletin Boards

TIMING August – November 2023
& March – May 2024

TACTICS Full wrap (x2 sides)

GEO Denver Metro Area

TIMING December 2023 – March 2024

TACTICS 2 Bulletin boards (14' x 48')

GEO Denver, along I-70 (East & West facing)

Digital Media

Email (MailChimp)

TIMING

Once a quarter

TACTICS

MailChimp

AUDIENCE

Collected email addresses

DETAILS

Newsletter sent once a quarter with Council updates and news updates.

Digital Media Tactics – The Trade Desk

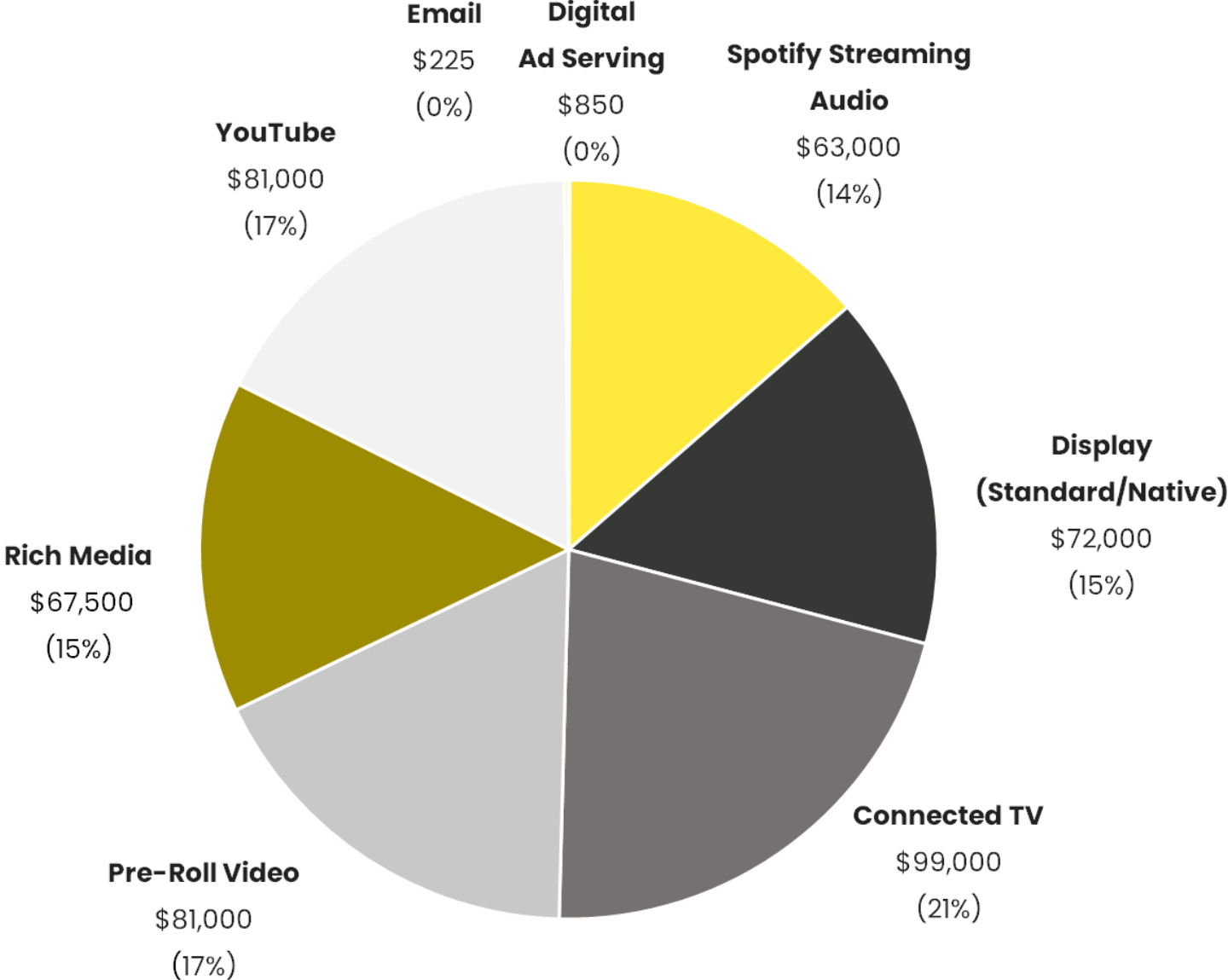


| Activation Summary | Tactic | Estimated Impressions | KPIs | Cost |
|---|----------------|-----------------------|------|----------|
| <p>Reach the AE and HA audiences and capture their attention within content where they're spending a large amount of time.</p> | | | | |
| <p>Target the audiences with multiple messages across several channels with optimal frequency to keep CWC top-of-mind.</p> | Connected TV | 3,093,750 | VCR | \$99,000 |
| <p>Targeting:</p> | | | | |
| <p>Behavioral: (BT Voters and Outdoor Enthusiasts, excluding adults over 44)</p> | | | | |
| <p>Contextual: Targeted branded/unbranded keywords such as Boreal toad, wildlife conservation, Black Footed ferret</p> | Pre-roll Video | 6,750,000 | VCR | \$81,000 |
| <p>Retargeting website visitors</p> | | | | |
| <p>CTV: Test Contextual targeting vs. Content Signaling targeting vs. Behavioral targeting for CTV to deepen engagement. Utilize real-time search behaviors to create relevant in-market audiences. Examples include targeting audiences who have shown interest in outdoor activities via key words including outdoor activities, hiking trails, great outdoors, camping, spend time outside, weekend ideas, day trip, picnic ideas, national parks, nature reserves, etc.</p> | Display | 7,200,000 | CTR | \$36,000 |
| <p>Timing: Always on approach running from 8/1-11/30 and 1/1-5/31.</p> | Native | 5,142,857 | CTR | \$36,000 |



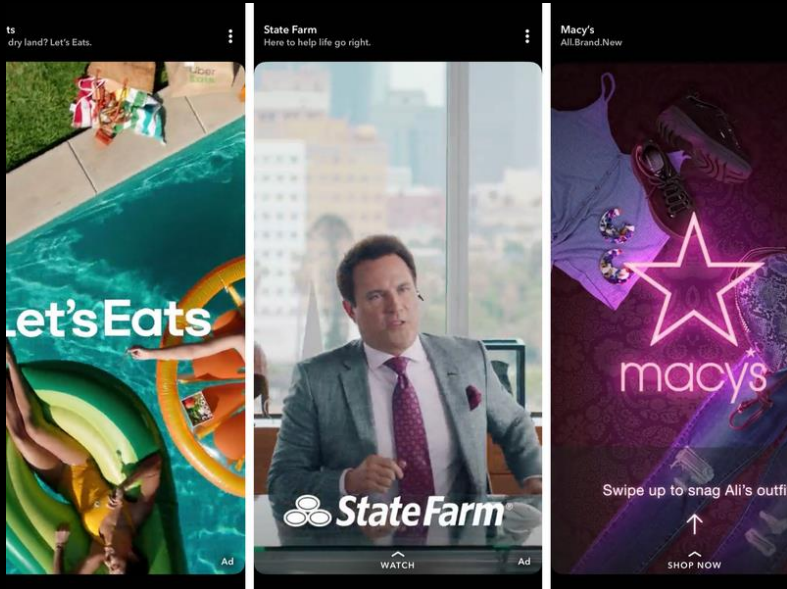
| Tactic | Activation Summary | Estimated Impressions | KPIs | Cost |
|--|--|-----------------------|------------------------|----------|
| Rich Media Undertone | <ul style="list-style-type: none"> The Page Grabber unit will reach Adults 18-44 living in Colorado with a passion for the outdoors through Undertone's proprietary high-impact video unit, creating an emotional connection that compels a user to act. | 4,218,750 | CTR Engagement Rate | \$67,500 |
| Spotify | <ul style="list-style-type: none"> Sponsored sessions drive brand awareness and ad recall among the AE audience with thumb-stopping video creative that provides the user with a reward for watching the video to completion. | 525,000 | VCR | \$63,000 |
| YouTube | <ul style="list-style-type: none"> Utilize a skippable in-stream placement that's optimized toward view-rate with a cost-per-view (CPV) bid method. Expand awareness by targeting the AE and HA audiences while also retargeting users who have engaged via search or visited the website. | 8,100,000 | VCR | \$81,000 |
| <p>Timing: Always on approach running from 8/1-11/30 and 1/1-5/31.</p> | | | | |

Digital Media Budget



Social Media

Snapchat NEW



TIMING

August 1 – November 30, 2023
& January – May 31, 2024

AD UNITS

Snap and Story ads

GEO

Colorado

STRATEGY

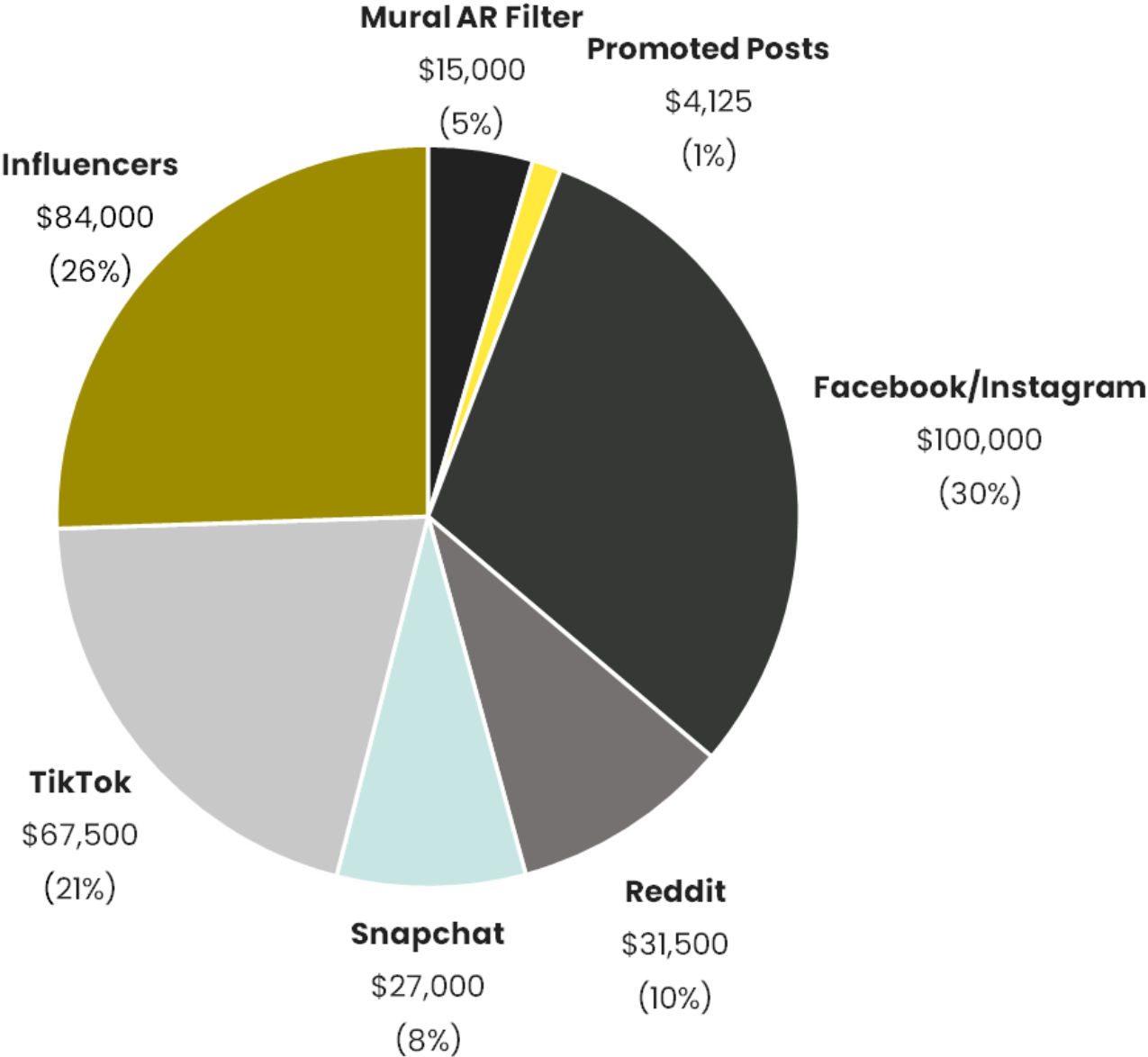
Drive brand awareness and ad recall among the AE and HA audiences with engaging video creative.

Social Media



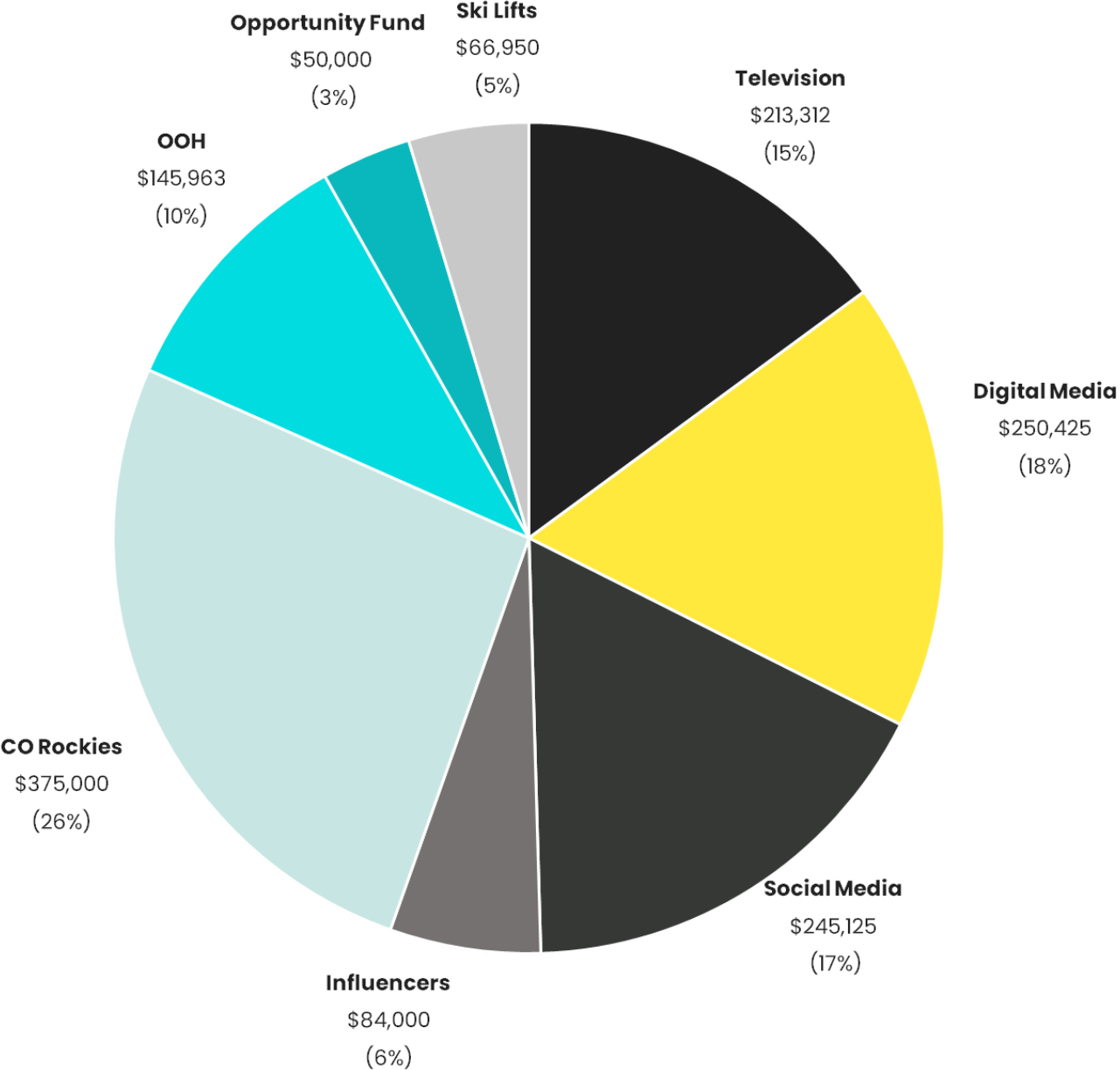
| Tactic | Activation Summary | Estimated Impressions | KPI | Cost |
|-------------------------|--|-----------------------|--|-----------|
| Facebook/Instagram | <ul style="list-style-type: none"> Utilize the platforms' targeting capabilities to reach the AE and HA audiences based on their interests and demographic data. Implement geo-targeting around the downtown Denver mural to reach those in the area with the CWC filter. Leverage look-alike and retargeting audiences based on data from past campaigns and website visitation. Boost organic content to achieve greater engagement and reach beyond the organic feed. | 11,950,000 | VCR Post Engagements CTR | \$119,500 |
| Influencers - Undertone | <ul style="list-style-type: none"> Amplify messaging and organically connect with the AE target audience at one of their frequent media touchpoints. In addition to the influencer's current in-feed content, the influencers will produce more dynamic content such as IG Reels. | TBC | Organic & Paid Reach Likes Link Clicks Post Engagements | \$84,000 |
| Reddit | <ul style="list-style-type: none"> Target the AE and HA audiences through wildlife focused creative based on interactions with content or communities relating to the outdoors and sustainability. Leverage retargeting audiences based on website visitation. | 3,150,000 | VCR CTR | \$31,500 |
| Snapchat | <p>Test advertising on Snapchat where our audience seeks out community and personal interests via Snap and Story ads. <i>Note that these ads are very different from the geo filters that ran years ago.</i></p> | 2,700,000 | VCR CTR | \$27,000 |
| TikTok | <p>Drive brand awareness and ad recall among the AE and HA audiences with thumb-stopping video creative. Utilize the platform's targeting capabilities to reach the audiences based on their interests and demographic data.</p> | 6,750,000 | VCR | \$67,500 |

Social Media Budget



Budget Allocation

Planned Budget Allocation



Additional Considerations

Should the Budget Allow

DIGITAL

Amazon Prime Video ads
Disney+ ads
Twitter ads

OOH

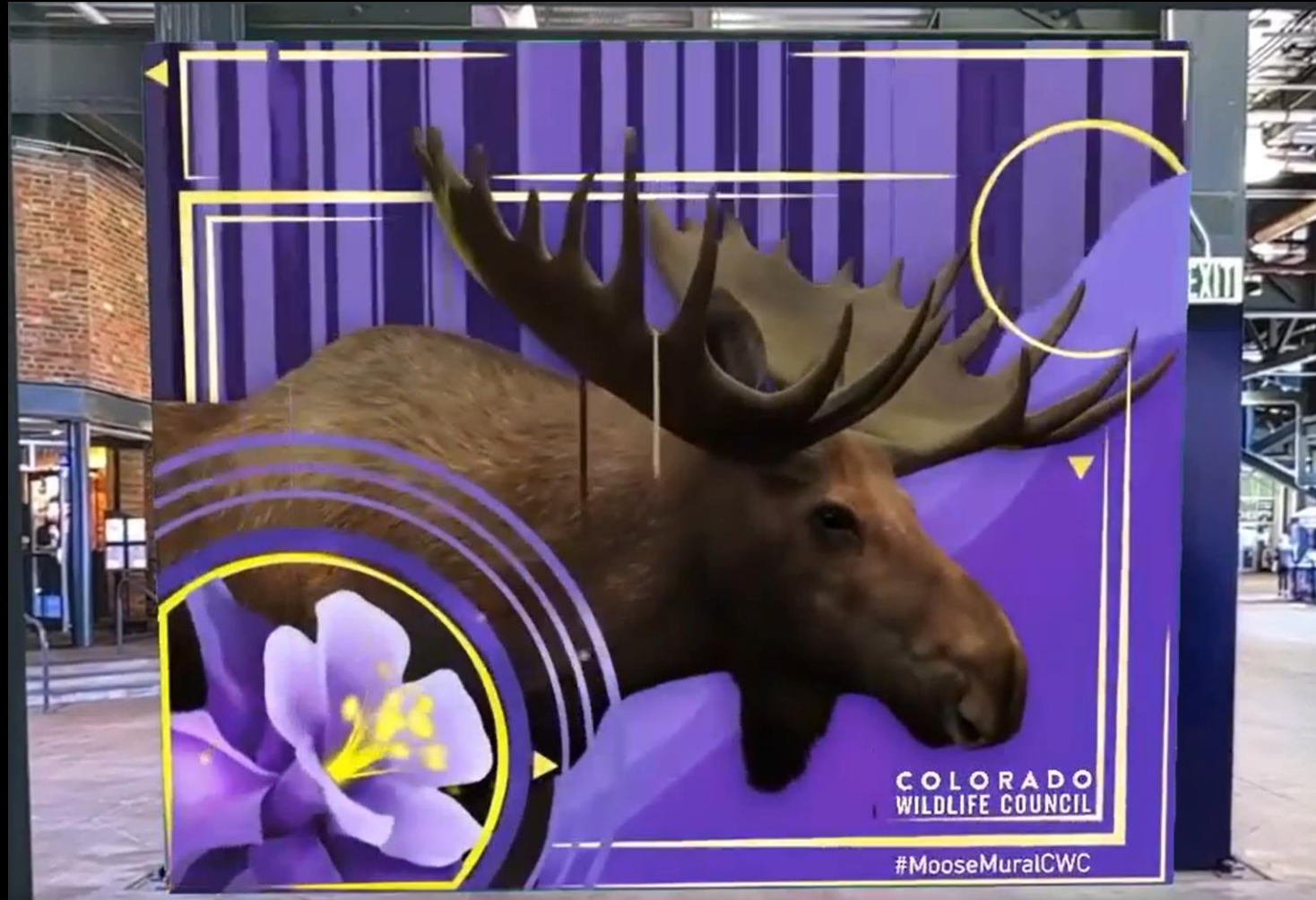
Additional bulletin boards
Gas station TV ads
Gym/health club ads

Rockies Partnership

Updates

The AR effect is now LIVE!

(screenshot from video)



Rockies

Partnership

Social Post #1

- The creative subcommittee approved "Fishing for Facts" concept for a video produced by the Rockies for their own social channels
- Fishing for Facts will feature Dinger (Rockies mascot) "fishing" and will show conservation facts related to fishing
- The video will be shared on National Go Fishing Day

Action Items

Action Items

- Approve Paid Media Reco

Upcoming

- June 14-19- production
- July 13- council meeting – Zoom

Thank
You



Thank
Thank
Thank
Thank

Prepared by:
R&R Partners

Appendix

FY 23/24 Budget (\$2,800,000)

| BASIC COMPENSATION | HOURS* | FEES | EXPENSES | TOTAL |
|---|--------------|------------------|--------------------|--------------------|
| 1 Brand & Project Management | 1176 | \$152,880 | \$0 | \$152,880 |
| 2 Travel Expenses | 0 | n/a | \$20,000 | \$20,000 |
| SUBTOTAL: | 1176 | \$152,880 | \$20,000 | \$172,880 |
| Basic Compensation Rate (Monthly Fee) | | | | \$14,406.67 |
| CREATIVE PRODUCTION | HOURS | FEES | EXPENSES | TOTAL |
| 3 Creative Concepting & Creative Asset Production | 2,209 | \$287,170 | \$450,000 | \$737,170 |
| 4 Social Media Strategy, Community Management & Creative Graphics | 240 | \$31,200 | \$0 | \$31,200 |
| 5 Website Maintenance | 156 | \$20,280 | \$2,000 | \$22,280 |
| SUBTOTAL: | 2,605 | \$338,650 | \$452,000 | \$790,650 |
| RESEARCH & PLANNING | HOURS | FEES | EXPENSES | TOTAL |
| 6 Public Relations/Earned Media | 130 | \$16,900 | \$3,000 | \$19,900 |
| 7 Analytics, Brand Strategy & Secondary | 112 | \$14,560 | \$0 | \$14,560 |
| 8 Quantitative Online Survey | 70 | \$9,100 | \$47,000 | \$56,100 |
| 9 Competitive Analysis & Report | 44 | \$5,720 | \$0 | \$5,720 |
| SUBTOTAL: | 356 | \$46,280 | \$50,000 | \$96,280 |
| MEDIA PLACEMENTS | HOURS | FEES | EXPENSES | TOTAL |
| 10 Campaign Planning, Buying, Reporting & Optimizing | 732 | \$95,160 | \$1,595,030 | \$1,690,190 |
| 11 Paid Media Opportunity Fund | 0 | \$0 | \$50,000 | \$50,000 |
| SUBTOTAL: | 732 | \$95,160 | \$1,645,030 | \$1,740,190 |
| GRAND TOTAL**: | 4,869 | \$632,970 | \$2,167,030 | \$2,800,000 |

FY 22/23 Budget (\$2,650,000)

| BASIC COMPENSATION | | HOURS* | FEES | EXPENSES | TOTAL |
|--|---|--------------|------------------|--------------------|--------------------|
| 1 | Brand & Project Management | 972 | \$126,360 | \$0 | \$126,360 |
| 2 | Travel Expenses | 0 | n/a | \$15,000 | \$15,000 |
| SUBTOTAL: | | 972 | \$126,360 | \$15,000 | \$141,360 |
| <i>Basic Compensation Rate (Monthly Fee)</i> | | | | | \$11,780 |
| CREATIVE PRODUCTION | | HOURS | FEES | EXPENSES | TOTAL |
| 3 | Creative Concepting & Creative Asset Production | 1,098 | \$142,740 | \$480,000 | \$622,740 |
| 4 | Social Media Strategy, Community Management & Creative Graphics | 210 | \$27,300 | \$0 | \$27,300 |
| 5 | Website Maintenance | 146 | \$18,980 | \$400 | \$19,380 |
| SUBTOTAL: | | 1,454 | \$189,020 | \$480,400 | \$669,420 |
| RESEARCH & PLANNING | | HOURS | FEES | EXPENSES | TOTAL |
| 6 | Public Relations/Earned Media | 84 | \$10,920 | \$3,000 | \$13,920 |
| 7 | Exploratory Research | 100 | \$13,000 | \$207,000 | \$220,000 |
| 8 | Analytics, Brand Strategy & Secondary | 60 | \$7,800 | \$0 | \$7,800 |
| 9 | Quantitative Online Survey | 70 | \$9,100 | \$39,350 | \$48,450 |
| 10 | Competitive Analysis & Report | 40 | \$5,200 | \$0 | \$5,200 |
| SUBTOTAL: | | 354 | \$46,020 | \$249,350 | \$295,370 |
| MEDIA PLACEMENTS | | HOURS | FEES | EXPENSES | TOTAL |
| 11 | Campaign Planning, Buying, Reporting & Optimizing | 510 | \$66,300 | \$1,477,550 | \$1,543,850 |
| SUBTOTAL: | | 510 | \$66,300 | \$1,477,550 | \$1,543,850 |
| GRAND TOTAL**: | | 3,290 | \$427,700 | \$2,222,300 | \$2,650,000 |

FY21/22 Budget

| BASIC COMPENSATION | HOURS* | FEES | EXPENSES | TOTAL |
|---|--------------|------------------|--------------------|--------------------|
| 1 Brand & Project Management | 900 | \$117,000 | \$0 | \$117,000 |
| 2 Travel Expenses | n/a | n/a | \$15,000 | \$15,000 |
| SUBTOTAL: | 900 | \$117,000 | \$15,000 | \$132,000 |
| Basic Compensation Rate (Monthly Fee) | | | | \$11,000.00 |
| CREATIVE PRODUCTION | HOURS | FEES | EXPENSES | TOTAL |
| 3 Creative Concepting & Creative Asset Production | 1200 | \$156,000 | \$330,000 | \$486,000 |
| 4 Social Media Strategy & Community Management | 198 | \$25,740 | \$0 | \$25,740 |
| 5 Website Maintenance | 48 | \$6,240 | \$300 | \$6,540 |
| SUBTOTAL: | 1446 | \$187,980 | \$330,300 | \$518,280 |
| RESEARCH & PLANNING | HOURS | FEES | EXPENSES | TOTAL |
| 6 Campaign Reporting/Analytics & Brand Strategy | 196 | \$25,480 | \$0 | \$25,480 |
| 7 Public Relations/Earned Media | 150 | \$19,500 | \$3,000 | \$22,500 |
| 8 Quantitative Online Survey | 100 | \$13,000 | \$35,000 | \$48,000 |
| 9 Competitive Analysis & Report | 40 | \$5,200 | \$0 | \$5,200 |
| SUBTOTAL: | 486 | \$63,180 | \$38,000 | \$101,180 |
| MEDIA PLACEMENTS | HOURS | FEES | EXPENSES | TOTAL |
| 0 Campaign Planning, Buying, Reporting & Optimizing | 600 | \$78,000 | \$1,245,540 | \$1,323,540 |
| SUBTOTAL: | 600 | \$78,000 | \$1,245,540 | \$1,323,540 |
| GRAND TOTAL**: | 3,432 | \$446,160 | \$1,628,840 | \$2,075,000 |

FY20/21 Budget

| BASIC COMPENSATION | HOURS* | FEES | EXPENSES | TOTAL |
|---|--------------|------------------|--------------------|--------------------|
| 1 Brand & Project Management | 846 | \$97,290 | \$0 | \$97,290 |
| 2 Creative Development | 148 | \$17,020 | \$0 | \$17,020 |
| 3 Media Planning & Buying (Wkly. Evergreen) | 84 | \$9,660 | \$0 | \$9,660 |
| 4 Social Media Strategy & Community Management | 298 | \$34,270 | \$0 | \$34,270 |
| 5 Website Maintenance | 72 | \$8,280 | \$295 | \$8,575 |
| 6 Campaign Reporting/Analytics & Brand Strategy | 214 | \$24,610 | \$0 | \$24,610 |
| 7 Strategic Consultation | 0 | \$0 | \$72,000 | \$72,000 |
| 8 Travel Expenses | 0 | \$0 | \$15,000 | \$15,000 |
| SUBTOTAL: | 1,662 | \$191,130 | \$87,295 | \$278,425 |
| Basic Compensation Rate (Monthly Fee) | | | | \$23,202.08 |
| CREATIVE PRODUCTION | HOURS | FEES | EXPENSES | TOTAL |
| 9 Creative Concepting & Creative Asset Production | 1010 | \$116,150 | \$300,000 | \$416,150 |
| 10 Website Redesign | 504 | \$57,960 | \$2,500 | \$60,460 |
| SUBTOTAL: | 1514 | \$174,110 | \$302,500 | \$476,610 |
| RESEARCH & PLANNING | HOURS | FEES | EXPENSES | TOTAL |
| 11 Quantitative Online Survey | 100 | \$11,500 | \$15,000 | \$26,500 |
| 12 Qualitative Exploratory Research | 140 | \$16,100 | \$2,500 | \$18,600 |
| 13 Competitive Analysis & Report | 42 | \$4,830 | \$0 | \$4,830 |
| SUBTOTAL: | 282 | \$32,430 | \$17,500 | \$49,930 |
| MEDIA PLACEMENTS | HOURS | FEES | EXPENSES | TOTAL |
| 14 Media Placements; Campaign Planning & Buying | 609 | \$70,035 | \$1,200,000 | \$1,270,035 |
| SUBTOTAL: | 609 | \$70,035 | \$1,200,000 | \$1,270,035 |
| GRAND TOTAL**: | 4,067 | \$467,705 | \$1,607,295 | \$2,075,000 |

FY 19/20 Budget

| BASIC COMPENSATION | HOURS* | FEES | EXPENSES | TOTAL |
|---|--------------|------------------|--------------------|--------------------|
| Brand & Project Management | 656 | \$75,440 | \$0 | \$75,440 |
| Creative Development | 100 | \$11,500 | \$0 | \$11,500 |
| Media Planning & Buying (Wkly. Evergreen) | 84 | \$9,660 | \$0 | \$9,660 |
| Social Media Strategy & Community Management | 270 | \$31,050 | \$0 | \$31,050 |
| Website Maintenance | 72 | \$8,280 | \$300 | \$8,580 |
| Community Partnership Building | 36 | \$4,140 | \$0 | \$4,140 |
| Campaign Reporting/Analytics & Brand Strategy | 148 | \$17,020 | \$0 | \$17,020 |
| Strategic Consultation | 0 | \$0 | \$72,000 | \$72,000 |
| Travel Expenses | 0 | \$0 | \$12,000 | \$12,000 |
| SUBTOTAL: | 1,366 | \$157,090 | \$84,300 | \$241,390 |
| Basic Compensation Rate (Monthly Fee) | | | | \$20,115.83 |
| CREATIVE PRODUCTION | HOURS | FEES | EXPENSES | TOTAL |
| Creative Concepting & Creative Asset Production | 1168 | \$134,320 | \$360,000 | \$494,320 |
| Website Content + Copy Updates | 80 | \$9,200 | \$0 | \$9,200 |
| SUBTOTAL: | 1248 | \$143,520 | \$360,000 | \$503,520 |
| RESEARCH & PLANNING | HOURS | FEES | EXPENSES | TOTAL |
| Quantitative Online Survey | 100 | \$11,500 | \$15,000 | \$26,500 |
| Communications Toolkit | 72 | \$8,280 | \$3,000 | \$11,280 |
| Competitive Analysis & Report | 42 | \$4,830 | \$0 | \$4,830 |
| SUBTOTAL: | 214 | \$24,610 | \$18,000 | \$42,610 |
| MEDIA PLACEMENTS | HOURS | FEES | EXPENSES | TOTAL |
| Media Placements; Campaign Planning & Buying | 499 | \$57,385 | \$1,230,095 | \$1,287,480 |
| SUBTOTAL: | 499 | \$57,385 | \$1,230,095 | \$1,287,480 |
| GRAND TOTAL**: | 3,327 | \$382,605 | \$1,692,395 | \$2,075,000 |

FY 18/19 Budget

| BASIC COMPENSATION | HOURS* | FEES | EXPENSES | TOTAL |
|--|--------------|------------------|------------------|--------------------|
| 1 Brand & Project Management | 550 | \$63,250 | \$0 | \$63,250 |
| 2 Creative Development | 92 | \$10,580 | \$0 | \$10,580 |
| 3 Media Planning & Buying | 52 | \$5,980 | \$0 | \$5,980 |
| 4 Social Media Strategy & Community Management | 180 | \$20,700 | \$0 | \$20,700 |
| 5 Website Maintenance | 60 | \$6,900 | \$300 | \$7,200 |
| 6 Community Partnership Building | 24 | \$2,760 | \$0 | \$2,760 |
| 7 Campaign Reporting/Analytics & Strategy | 85 | \$9,775 | \$0 | \$9,775 |
| 8 Strategic Consultation | 0 | \$0 | \$48,000 | \$48,000 |
| 9 Travel Expenses | 0 | \$0 | \$9,005 | \$9,005 |
| SUBTOTAL: | 1,043 | \$119,945 | \$57,305 | \$177,250 |
| Basic Compensation Rate (Monthly Fee) | | | | \$14,770.83 |
| CREATIVE PRODUCTION | HOURS | FEES | EXPENSES | TOTAL |
| 10 Creative Assets; TV, digital, social, radio, etc. | 650 | \$74,750 | \$150,000 | \$224,750 |
| 11 Website Development | 120 | \$13,800 | \$5,015 | \$18,815 |
| SUBTOTAL: | 770 | \$88,550 | \$155,015 | \$243,565 |
| RESEARCH & PLANNING | HOURS | FEES | EXPENSES | TOTAL |
| 12 Quantitative Online Survey | 80 | \$9,200 | \$5,170 | \$14,370 |
| 13 Qualitative Concept Testing - r1 | 125 | \$14,375 | \$25,500 | \$39,875 |
| 14 Benefit + HAH Exploration | 219 | \$25,185 | \$210,000 | \$235,185 |
| 15 Qualitative Concept Testing - r2 | 170 | \$19,550 | \$25,500 | \$45,050 |
| 16 Website UX Testing | 40 | \$4,600 | \$2,500 | \$7,100 |
| SUBTOTAL: | 634 | \$72,910 | \$268,670 | \$341,580 |
| MEDIA PLACEMENTS | HOURS | FEES | EXPENSES | TOTAL |
| 17 Media Placements, Campaign Planning & Buying | 327 | \$37,605 | \$150,000 | \$187,605 |
| SUBTOTAL: | 327 | \$37,605 | \$150,000 | \$187,605 |
| GRAND TOTAL**: | 2,774 | \$319,010 | \$630,990 | \$950,000 |

FY 17/18 Budget

| EE | Description | HOURS* | FEES | EXPENSES | TOTAL |
|--|--|--------------|------------------|------------------|--------------------|
| 1 | Brand & Project Management | 525 | \$60,375 | \$0 | \$60,375 |
| 2 | Creative Development & Production | 250 | \$28,750 | \$0 | \$28,750 |
| 3 | Media Planning & Buying | 290 | \$33,350 | \$0 | \$33,350 |
| 4 | Social Media Strategy & Community Management | 350 | \$40,250 | \$0 | \$40,250 |
| 5 | Website Maintenance & Reporting | 72 | \$8,280 | \$280 | \$8,560 |
| 6 | Community Partnership Building | 30 | \$3,450 | \$0 | \$3,450 |
| 7 | Event Public Relations (Experiential) | 90 | \$10,350 | \$0 | \$10,350 |
| 8 | Campaign Reporting/Analytics | 40 | \$4,600 | \$0 | \$4,600 |
| 9 | Travel Expenses | 0 | \$0 | \$4,000 | \$4,000 |
| SUBTOTAL: | | 1,647 | \$189,405 | \$4,280 | \$193,685 |
| Basic Compensation Rate (Monthly Fee) | | | | | \$16,140.42 |
| Description | HOURS | FEES | EXPENSES | TOTAL | |
| 10 Experiential Events/Creative Assets | 200 | \$23,000 | \$20,000 | \$43,000 | |
| 11 In-Store POS Display | 100 | \$11,500 | \$10,000 | \$21,500 | |
| 12 Social Media Campaigns | 280 | \$32,200 | \$2,500 | \$34,700 | |
| 13 Website Design & Development | 410 | \$47,150 | \$250 | \$47,400 | |
| SUBTOTAL: | | 990 | \$113,850 | \$32,750 | \$146,600 |
| Description | HOURS | FEES | EXPENSES | TOTAL | |
| 14 Quantitative Online Survey | 65 | \$7,475 | \$5,320 | \$12,795 | |
| 15 Qualitative Intercepts | 200 | \$23,000 | \$1,500 | \$24,500 | |
| SUBTOTAL: | | 265 | \$30,475 | \$6,820 | \$37,295 |
| Description | HOURS | FEES | EXPENSES | TOTAL | |
| 16 Working Media Placements | 0 | \$0 | \$620,000 | \$620,000 | |
| SUBTOTAL: | | 0 | \$0 | \$620,000 | \$620,000 |
| GRAND TOTAL**: | | 2,902 | \$333,730 | \$663,850 | \$997,580 |

FY 16/17 Budget

| Description | HOURS* | FEES | EXPENSES | TOTAL | |
|--|--------|--------------|------------------|------------------|------------------|
| 1 Brand & Project Management | 285 | \$32,775 | \$0 | \$32,775 | |
| 2 Creative Development & Production | 315 | \$36,225 | \$0 | \$36,225 | |
| 3 Media Planning & Buying | 275 | \$31,625 | \$0 | \$31,625 | |
| 4 Social Media Strategy, Engagement & Production | 320 | \$36,800 | \$0 | \$36,800 | |
| 5 Website Maintenance & Reporting | 40 | \$4,600 | \$280 | \$4,880 | |
| SUBTOTAL: | | 1,235 | \$142,025 | \$280 | \$142,305 |
| Basic Compensation Rate (Monthly Fee) | | | | \$11,859 | |
| Description | HOURS | FEES | EXPENSES | TOTAL | |
| 6 Television + Digital Video Production | 80 | \$9,200 | \$100,000 | \$109,200 | |
| 7 Website Design & Development | 65 | \$7,475 | \$0 | \$7,475 | |
| 8 Photography | 20 | \$2,300 | \$15,000 | \$17,300 | |
| SUBTOTAL: | | 165 | \$18,975 | \$115,000 | \$133,975 |
| Description | HOURS | FEES | EXPENSES | TOTAL | |
| 9 Quantitative Online Survey | 75 | \$8,625 | \$11,750 | \$20,375 | |
| 10 Qualitative Focus Groups | 110 | \$12,650 | \$20,695 | \$33,345 | |
| SUBTOTAL: | | 185 | \$21,275 | \$32,445 | \$53,720 |
| Description | HOURS | FEES | EXPENSES | TOTAL | |
| 11 Working Media Placements | 0 | \$0 | \$520,000 | \$520,000 | |
| SUBTOTAL: | | 0 | \$0 | \$520,000 | \$520,000 |
| GRAND TOTAL**: | | 1,585 | \$182,275 | \$667,725 | \$850,000 |

Media Flights

- **Always on 23/24:** July 1 – June 30, 2024 (\$1,645,030)
- **Always on 22/23:** July 1 – June 30, 2023 (\$1,052,550)
- **Always On 21/22:** Sept. 13 – June 30, 2022 (\$1,245,540)
- **Spring 2021:** March 31 – May 30, 2021 (\$150,000)
- **Winter 2021:** Jan. 4 – March 31, 2021 (\$650,000)
- **Summer 2020:** July 1 – Aug. 31, 2020 (\$400,000)
- **Spring 2020:** Feb. 10 – May 31, 2020 (\$764,000)
- **Fall 2019:** Aug. 12 – Oct.31, 2019 (\$466,000)
- **Spring 2019:** Feb. 18 – March 22, 2019 (\$150,000)
- **Spring 2018:** April 2 – June 10, 2018 (\$308,000)
- **Fall 2017:** Sept. 11 – Nov. 17, 2017 (\$312,000)
- **Spring 2017:** March 1 – April 28, 2017 (\$442,000)
- **Summer 2016:** July 18 – Aug. 7, 2016 (\$78,000)

Quant Studies

- **Wave 9:** September 2023 (dates tbd)
- **Wave 8:** 9/6/22 – 9/15/22
- **Wave 7:** 8/30/21 – 9/10/21
- **Wave 6:** 9/2/20–9/13/20
- **Wave 5:** 1/20/20–1/31/20
- **Wave 4:** 1/31/19–2/7/19
- **Wave 3:** 1/8/18–1/19/18
- **Wave 2:** 5/30/17–6/8/17
- **Wave 1:** 10/24/16–11/4/16

Previous Influencers

Influencers used since 2019

- [Kyana Miner](#)
- [Macquel Martin](#)
- [Nelson Holland](#)
- [Jason George](#)
- [Ty Newcomb](#)
- [Rob Herrman](#)
- [Olivia Hsu](#)
- [Hunter Lawrence](#)
- [Abigail Lafleur](#)
- [Meredith Drangin](#)
- [Shyanne Orvis](#)
- [Maddie Brenneman](#)
- [TJ David](#)

Subcommittee Roles

| Review Category: | FY 2/23 Members: | Estimated Time Involved: | Commitment Details: |
|--|----------------------------------|--|--|
| Public Relations/ Earned Media/ Community Outreach | Don Anderson Eeland Stribling | 1 hour per quarter (4 hours total) | Review and provide feedback on future releases throughout the year. |
| Social Media | Tony Bohrer Eeland Stribling | 2 hours per quarter (8 hours total) | Review and provide feedback on quarterly calendars and ad hawk post opportunities throughout the year. Quarterly calendar reviews are in September, December, March and June. |
| Campaign Influencers | Shyanne Orvis | 6 hours total | Assist with selecting influencers from the provided options. Review influencers' posts and any rounds of revisions. Influencer reviews are in September and February. |
| Creative Production | Dan Gates Tim Twinem | 27 hours over the fiscal year | Reviewing production of final video scripts and casting approvals (August-September: 9 hours), video clips (late October-November: 2 hours), radio scripts and spot (late October-November: 1 hour), digital Banners (November-December: 1 hour), other campaign elements (November-December: 2 hours) and non-campaign elements (July-December: 12 hours, about 1 hour per month, give or take) |
| Quarterly Newsletter | Lani Kitching | .25 hours per quarter | Review copy and images for quarterly email newsletter |

* Brittni Ehrhart-Gemmill will oversee/participate on all subcommittees

Media Appendix

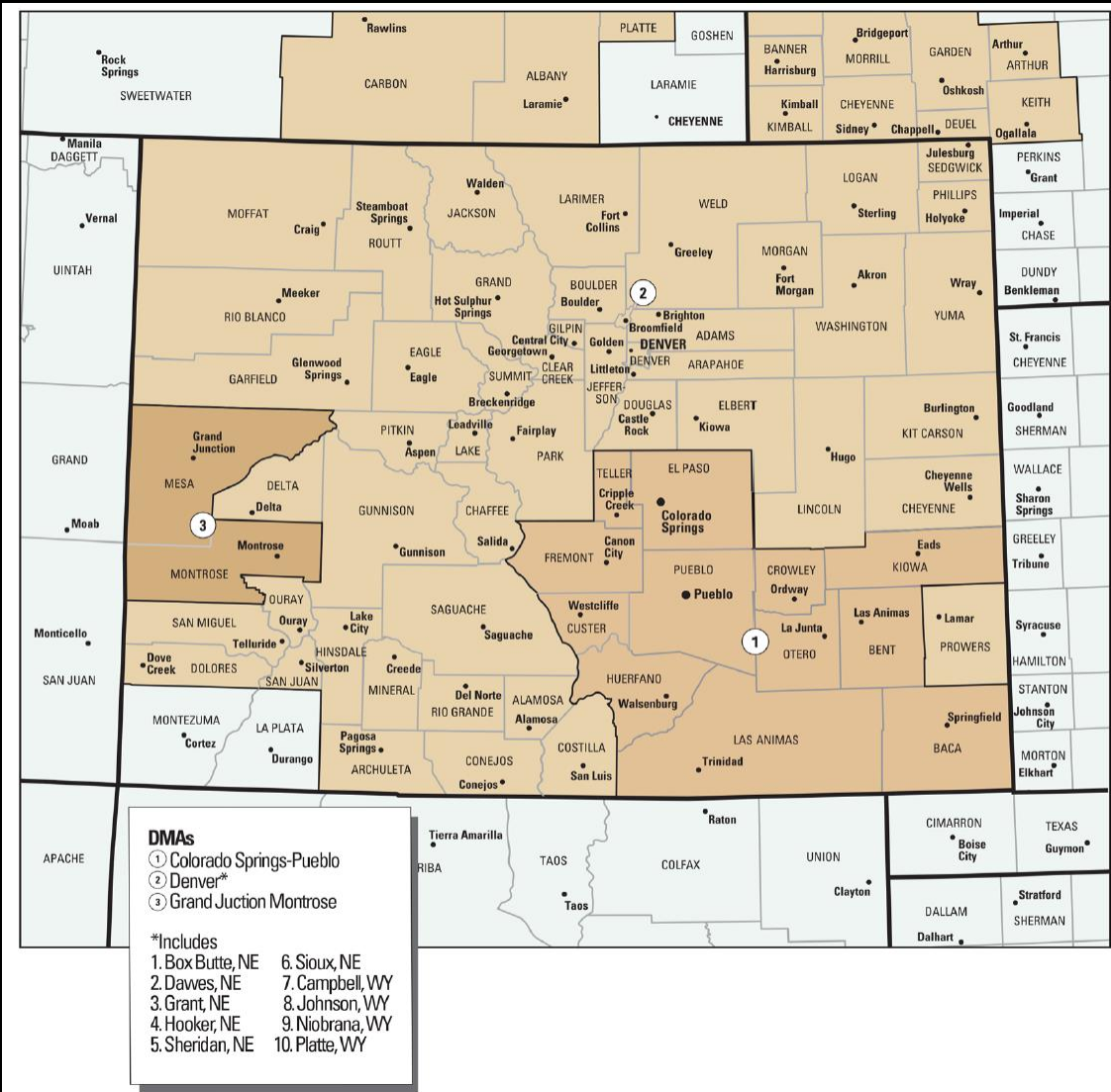
Market Research

State Trends – Colorado

- Between 2010 and 2020, Colorado gained nearly a million new residents, **growing by nearly 15%, which put it in the top 5 states for population growth, percentage-wise**. Most of the growth has been on the state's Front Range, with Weld and Broomfield County showing the largest growth rates. Additionally, Denver was one of just 14 cities nationwide to add more than 100,000 new residents during this time frame.
- Colorado is seeing substantial growth in its **Hispanic population, which increased from being 20.7% of the population in 2010 to nearly 22% in 2020** – that equates to 224,000 people. By 2030, Colorado's Hispanic population is expected to increase to 26% of the state's population.
- In July, Colorado's **unemployment rate was 3.3%, which is the lowest rate since February 2020** – right before the pandemic. Since May 2020, Colorado's private sector has grown by 417,800 jobs, and their economy has been booming. However, recent forecasts predict that Colorado's **economic growth will slow considerably in Q42022**, which is chalked up to the combined effects of continued supply chain disruptions, inflation and the war in Ukraine.

Source: The Denver Post, 8/13/21; KDVR, 2/11/22; Out There Colorado, 2/16/22, 9 News, 2/14/22; United Van Lines, 2021 Annual National Movers Survey, 1/3/22, Colorado Department of Labor and Employment, accessed 9/8/22; University of Colorado Boulder, Leeds Business Research Division, 12/6/21; Colorado Futures Center, 6/13/22

Colorado Trends



- Per the US Census, the Denver population is White (80%), with the next largest group being Hispanics (29%). Whereas Grand Junction is even more predominantly White (91%) and less population of Hispanics (16%)
- Over 90% of both Denver and Grand Junction have graduated high school. 50% of Denver have Bachelor's degrees or higher, with only 33% of Grand Junction residents having Bachelor's degrees or higher
- Denver's Median Household Income is \$72,661, Grand Junction's Median Household income is \$54,570
- The Denver mean travel time to work is 25.7 minutes vs. Grand Junction at 15.9 minutes
- Denver Cable Penetration is 46% and Grand Junction is 44%

Source: Strata Market Profiler (DMA Map), United States Census July 2021, Nielsen Market Profiler 2022

Media Landscape

Media Landscape – Media Inflation Trends

U.S. ADVERTISING MEDIA OWNER AD REVENUE SUMMARY – EXCLUDING U.S. POLITICAL

| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|----------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| TOTAL TV | 64,401.7 | 65,382.1 | 67,757.1 | 65,974.2 | 63,980.0 | 63,767.8 | 57,125.7 | 63,144.3 | 61,667.5 | 62,163.5 | 61,526.2 | 61,408.3 | 60,462.7 |
| • Growth | 2.4% | 1.5% | 3.6% | -2.6% | -3.0% | -0.3% | -10.4% | 10.5% | -2.3% | 0.8% | -1.0% | -0.2% | -1.5% |
| - NATIONAL TV | 41,064.2 | 41,313.1 | 43,416.8 | 41,835.6 | 42,992.3 | 42,855.8 | 39,895.6 | 43,368.9 | 43,368.9 | 43,568.0 | 43,598.1 | 43,471.0 | 43,201.9 |
| • Growth | 3.8% | 0.6% | 5.1% | -3.6% | 2.8% | -0.3% | -6.9% | 8.7% | 0.0% | 0.5% | 0.1% | -0.3% | -0.6% |
| - LOCAL TV | 23,337.5 | 24,069.0 | 24,340.2 | 24,138.6 | 20,987.8 | 20,912.1 | 17,230.1 | 19,775.4 | 18,298.6 | 18,595.5 | 17,928.1 | 17,937.2 | 17,260.8 |
| • Growth | 0.1% | 3.1% | 1.1% | -0.8% | -13.1% | -0.4% | -17.6% | 14.8% | -7.5% | 1.6% | -3.6% | 0.1% | -3.8% |
| TOTAL RADIO | 16,315.6 | 16,420.6 | 16,727.4 | 16,714.0 | 16,143.5 | 16,482.1 | 11,998.0 | 15,034.2 | 15,713.5 | 15,855.3 | 15,882.3 | 15,789.1 | 15,757.8 |
| • Growth | -1.8% | 0.6% | 1.9% | -0.1% | -3.4% | 2.1% | -27.2% | 25.3% | 4.5% | 0.9% | 0.2% | -0.6% | -0.2% |
| TOTAL NEWSPAPERS | 21,677.8 | 20,269.2 | 17,802.4 | 16,374.6 | 14,046.0 | 12,445.8 | 8,693.9 | 8,320.5 | 7,436.8 | 6,921.8 | 6,457.5 | 6,070.5 | 5,787.3 |
| • Growth | -7.8% | -6.5% | -12.2% | -8.0% | -14.2% | -11.4% | -30.1% | -4.3% | -10.6% | -6.9% | -6.7% | -6.0% | -4.7% |
| TOTAL MAGAZINES | 18,634.7 | 17,428.3 | 16,037.9 | 15,070.3 | 14,214.4 | 13,577.6 | 11,304.3 | 10,923.5 | 9,721.9 | 9,023.6 | 8,505.8 | 8,043.8 | 7,664.0 |
| • Growth | -7.1% | -6.5% | -8.0% | -6.0% | -5.7% | -4.5% | -16.7% | -3.4% | -11.0% | -7.2% | -5.7% | -5.4% | -4.7% |
| OUT-OF-HOME | 6,249.1 | 6,583.5 | 6,647.7 | 6,799.3 | 7,117.2 | 7,730.3 | 5,630.6 | 6,833.5 | 8,064.6 | 8,548.5 | 9,018.6 | 9,469.6 | 9,895.7 |
| • Growth | 0.3% | 5.4% | 1.0% | 2.3% | 4.7% | 8.6% | -27.2% | 21.4% | 18.0% | 6.0% | 5.5% | 5.0% | 4.5% |
| CINEMA | 631.9 | 716.4 | 758.3 | 750.7 | 781.2 | 809.7 | 149.4 | 415.0 | 645.0 | 667.7 | 687.5 | 704.1 | 717.3 |
| • Growth | -6.8% | 13.4% | 5.8% | -1.0% | 4.1% | 3.7% | -81.6% | 177.8% | 55.4% | 3.5% | 3.0% | 2.4% | 1.9% |
| DIRECT MAIL | 16,875.8 | 17,374.0 | 16,331.0 | 16,151.0 | 15,465.0 | 15,655.6 | 11,794.4 | 13,352.3 | 12,426.3 | 12,114.6 | 11,665.4 | 11,077.4 | 10,463.3 |
| • Growth | 0.9% | 3.0% | -6.0% | -1.1% | -4.2% | 1.2% | -24.7% | 13.2% | -6.9% | -2.5% | -3.7% | -5.0% | -5.5% |
| DIRECTORIES | 4,707.0 | 4,320.0 | 3,758.0 | 3,342.0 | 2,706.0 | 2,118.1 | 1,502.7 | 1,143.7 | 857.8 | 588.8 | 452.2 | 332.9 | 255.1 |
| • Growth | 4.9% | -8.2% | -13.0% | -11.1% | -19.0% | -21.7% | -29.1% | -23.9% | -25.0% | -31.4% | -23.2% | -26.4% | -23.4% |
| PURE-PLAY INTERNET | 38,270.6 | 46,377.5 | 57,261.3 | 72,994.6 | 89,490.6 | 106,359.3 | 117,353.4 | 156,610.6 | 185,730.0 | 204,515.4 | 223,825.5 | 242,026.5 | 259,890.5 |
| • Growth | 16.2% | 21.2% | 23.5% | 27.5% | 22.6% | 18.8% | 10.3% | 33.5% | 18.6% | 10.1% | 9.4% | 8.1% | 7.4% |
| - SEARCH | 24,861.3 | 29,189.9 | 33,615.0 | 40,310.0 | 47,200.0 | 54,100.0 | 55,428.5 | 71,510.4 | 84,519.4 | 91,022.9 | 97,378.9 | 102,877.3 | 107,871.7 |
| • Growth | 16.9% | 17.4% | 15.2% | 19.9% | 17.1% | 14.6% | 2.5% | 29.0% | 18.2% | 7.7% | 7.0% | 5.6% | 4.9% |
| - Ex-Search | 13,409.3 | 17,187.6 | 23,646.3 | 32,684.6 | 42,290.6 | 52,259.3 | 61,924.9 | 85,100.2 | 101,210.6 | 113,492.5 | 126,446.6 | 139,149.2 | 152,018.8 |
| • Growth | 14.9% | 28.2% | 37.6% | 38.2% | 29.4% | 23.6% | 18.5% | 37.4% | 18.9% | 12.1% | 11.4% | 10.0% | 9.2% |
| TOTAL | 187,764.3 | 194,871.7 | 203,081.0 | 214,170.7 | 223,943.9 | 238,946.3 | 225,552.4 | 275,777.5 | 302,263.3 | 320,399.1 | 338,021.1 | 354,922.2 | 370,893.7 |
| • Growth | 2.0% | 3.8% | 4.2% | 5.5% | 4.6% | 6.7% | -5.6% | 22.3% | 9.6% | 6.0% | 5.5% | 5.0% | 4.5% |
| POLITICAL ADVERTISING | 4,186.5 | 1,051.0 | 6,274.8 | 1,858.4 | 7,459.2 | 2,137.6 | 13,611.1 | 2,778.8 | 10,888.9 | 2,917.8 | 16,333.4 | 3,063.6 | 17,150.0 |
| TOTAL INCLUDING POLITICAL | 191,950.7 | 195,922.6 | 209,355.9 | 216,029.1 | 231,403.1 | 241,083.9 | 239,163.5 | 278,556.3 | 313,152.3 | 323,316.9 | 354,354.5 | 357,985.8 | 388,043.7 |
| • Growth | 3.8% | 2.1% | 6.9% | 3.2% | 7.1% | 4.2% | -0.8% | 16.5% | 12.4% | 3.2% | 9.6% | 1.0% | 8.4% |

SOURCE: GroupM (excludes U.S. political advertising and digital extensions in traditional media categories)

- GroupM forecasted a 22% increase, excluding political, in U.S. ad spend during 2021. That growth is expected to continue through 2022–2023, hitting record expenditures.
- Digital will see highest growth in 2023 at 10.1%.
- OOH and Cinema will see positive single-digit growth into 2023.
- Television keeps steady in the #2 channel position (behind digital) with modest growth in national and local in 2023; similar to Radio's 1% growth.
- Magazines, Newsprint, and Directories all continue on down-trend.

Media Landscape – Time Spent with Media

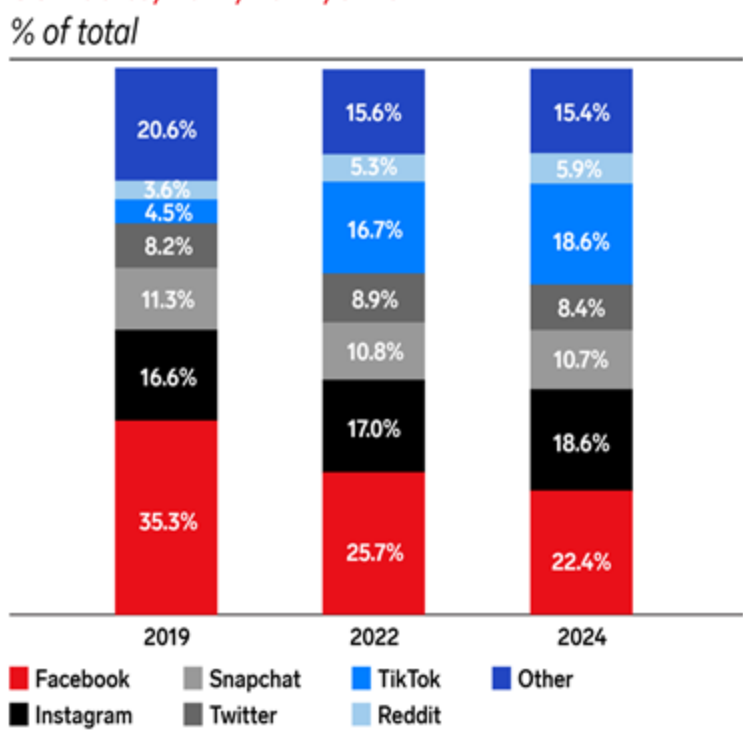
Growth in Average Time Spent with Media in the US, 2020-2024

% change among population

| | 2020 | 2021 | 2022 | 2023 | 2024 |
|---------------------------|--------------|--------------|--------------|--------------|--------------|
| Digital | 16.1% | 2.3% | 1.9% | 1.8% | 1.1% |
| — Mobile (nonvoice) | 13.7% | 3.1% | 2.3% | 2.1% | 1.2% |
| — Audio | 4.7% | 9.3% | 4.3% | 3.0% | 2.6% |
| — Video* | 18.1% | 5.0% | 3.7% | 3.6% | 2.2% |
| — Social network | 22.0% | 6.8% | 1.4% | 0.3% | 0.9% |
| — Other | 13.4% | -7.4% | 0.0% | 1.7% | -1.1% |
| — Desktop/laptop** | 8.9% | -2.7% | -2.6% | -2.1% | -1.7% |
| — Audio | 28.1% | -1.8% | 1.1% | 1.1% | 0.7% |
| — Video* | 16.6% | -0.6% | -2.1% | -2.0% | -1.1% |
| — Social network | 6.1% | -1.0% | -9.3% | -8.9% | -9.7% |
| — Other | 2.2% | -4.0% | -3.2% | -2.4% | -1.9% |
| — Other connected devices | 35.4% | 6.6% | 6.2% | 5.2% | 3.8% |
| Traditional media | -0.9% | -6.6% | -3.4% | -4.4% | -3.5% |
| — Radio*** | -9.0% | -3.3% | -0.6% | -2.3% | -1.8% |
| — Print*** | 1.3% | -4.8% | -3.7% | -3.4% | -3.0% |
| — Magazines | -1.6% | -2.6% | -3.2% | -2.8% | -2.8% |
| — Newspapers | 3.9% | -6.6% | -4.1% | -3.8% | -3.3% |
| — TV*** | 2.8% | -8.1% | -4.8% | -5.7% | -4.5% |
| — Other traditional media | -4.4% | -7.8% | 0.1% | -1.4% | -1.2% |
| Total | 8.4% | -1.4% | -0.2% | -0.6% | -0.6% |
| Total (hrs:mins) | 13:24 | 13:13 | 13:11 | 13:07 | 13:03 |

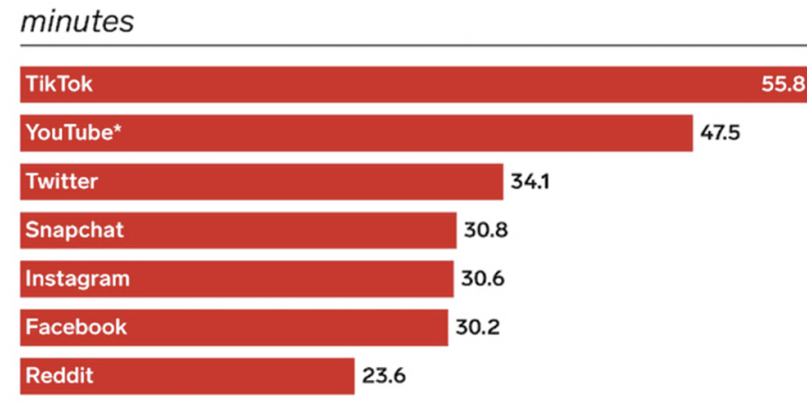
Note: ages 18+; includes digital via any device (excludes mobile voice), print (magazines and newspapers), radio, TV, and other; *excludes video streamed through social networks; **includes all internet activities on desktop and laptop computers; ***excludes digital
Source: eMarketer, April 2022

Share of Time Spent on Select Social Platforms by US Adults, 2019, 2022, & 2024



Note: ages 18+; includes all time spent on social network platforms regardless of device or multitasking
Source: eMarketer, April 2022

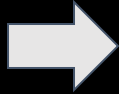
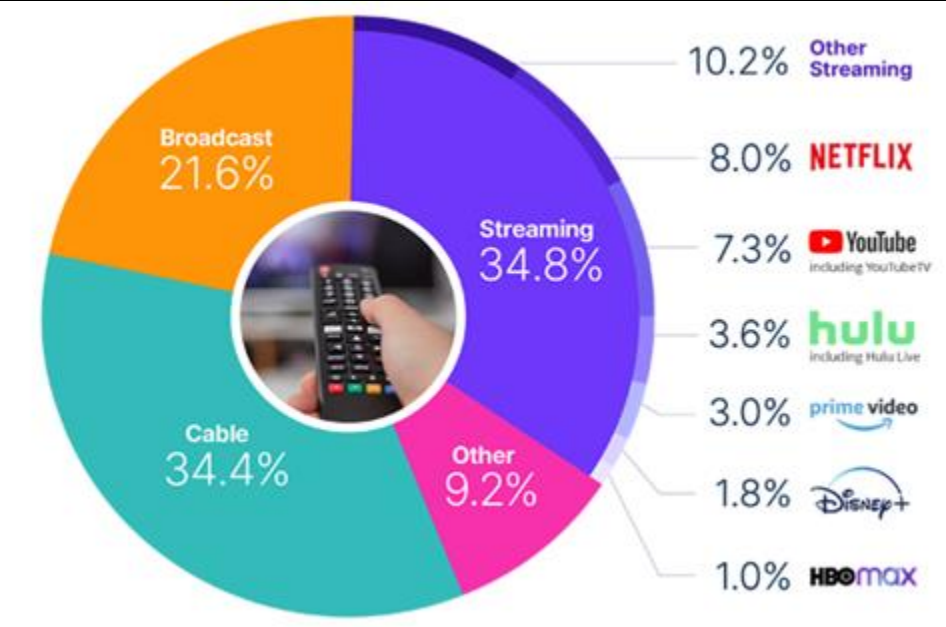
Average Time Spent per Day by US Adult Users on Select Social Media Platforms, 2023



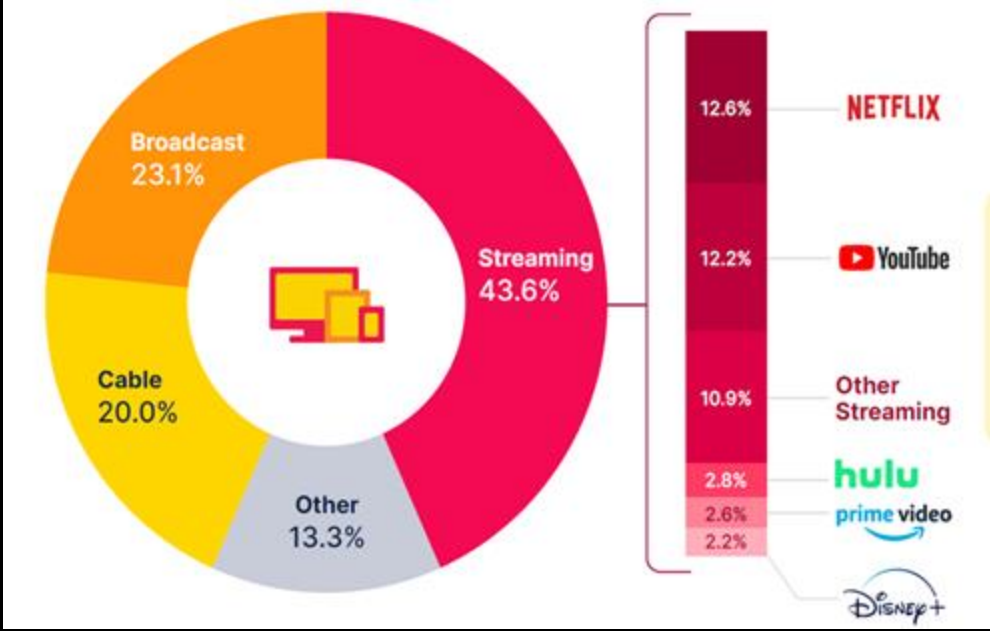
Note: ages 18+; internet users who use each social network via any device at least once per month; includes all time spent on social network platforms; includes usage via any device
*YouTube includes all time spent watching video on YouTube via any device; includes YouTube TV
Source: eMarketer, Jan 2023

Media Landscape – Time Spent with Television/Video

Total US Population



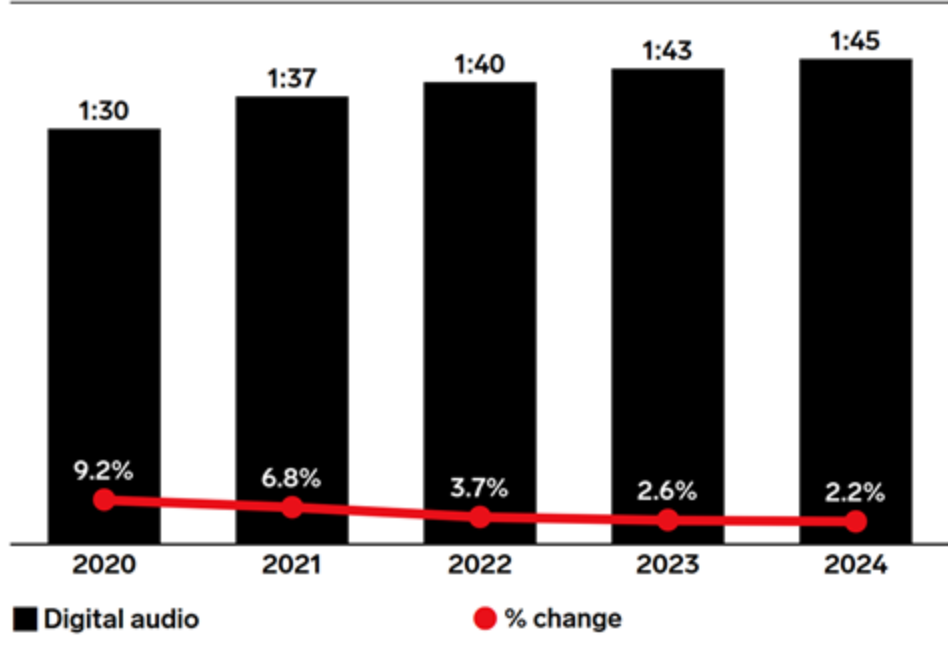
Total Hispanic Population



Source: Nielsen NPOWER, National TV Panel and Streaming Platform Ratings July 2022

Media Landscape – Time Spent with Digital Audio

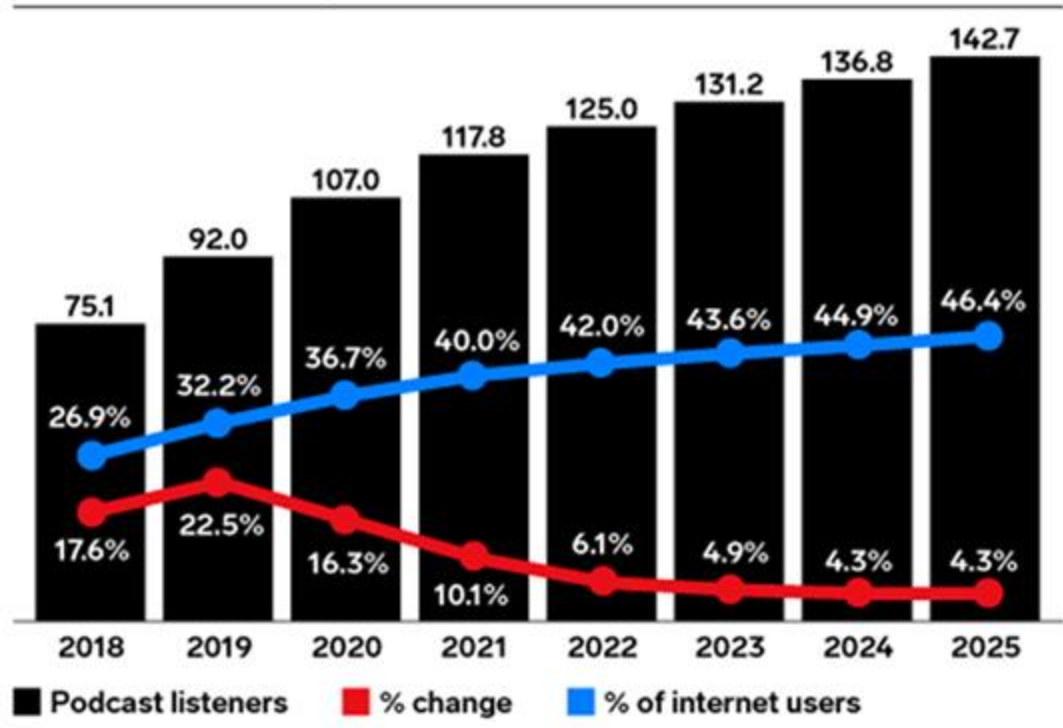
Digital Audio: Average Time Spent in the US, 2020-2024
 hrs:mins per day among population and % change



Note: ages 18+; includes all time spent listening to digital audio via any device. Digital audio includes music/other audio content delivered within a website or app (e.g., AM/FM online streams), podcasts (streamed or downloaded), online radio stations and streaming services; excludes other downloaded audio files (e.g., music MP3s) and digital terrestrial/satellite radio services that are delivered over the air
 Source: eMarketer, April 2022



US Podcast Listeners, 2018-2025
 millions, % change, and % of internet users



Note: internet users of any age who listen to a podcast via direct download or livestream on any device at least once per month
 Source: eMarketer, Aug 2021

Media Glossary

Glossary of Terms

animated display ad: digital creative that has motion awareness: top-of-funnel marketing to drive brand awareness and educate your target audience

benchmark: a single metric that averages the performance of all brands in an industry, used to gauge performance of media efforts

bumper ad: six-second videos that play before a user's selected video content. These add frequency to a larger Campaign.

call to action (CTA): the instruction in the creative to take some action; for example: "Book Now," "Learn More" or "Sign Up."

connected TV (CTV): TV connected to the internet that can stream videos through apps. CTV allows full-length video assets to be distributed on a big screen to our audiences (like broadcast) with the added benefit of precise targeting (like digital).

consideration: engaging users who have interacted with your brand and driving toward a call to action.
cost per acquisition (CPA): measures the total costs to acquire a desired campaign objective for your business; ex., enrollment in Way to Quit services

cost per click (CPC): your cost for each click your ad receives. Keep in mind that a click is not unique to the person taking action. If one person clicks on your ad three times, you will be charged for three clicks.

cost per thousand impressions (CPM): this is the most common method for web pricing. You will be charged for every 1,000 times your ad loads to a page. Keep in mind that a CPM is not a unique view.

click-through rate (CTR): the number of clicks your ad receives divided by the number of times your ad has been shown. The CTR percentage allows you to measure the engagement with your ad. The higher the percentage, the higher the engagement.

display tactics: made up of text-based, image or video advertisements that encourage the user to click through to a landing page and take action (e.g., call the quit line)

designated market area (DMA): a geographic location representing a county, state or country you choose to Target

demand side platform (DSP): a technology that allows advertisers to purchase display ad inventory across real-time bidding (RTB) networks like Google. Think of it this way: This is your campaign, your bid, your target audience; the DSP is just placing the ad buys on your behalf based on the criteria you've identified.

engagement: metric used to gauge user interaction with creative

frequency: average number of times individuals are exposed to the ad.

interactive advertising bureau (IAB): a business organization that sets the industry standard for digital advertising including ad specifications. Consider these specifications the standard and best practice for anything digital-advertising related.

impressions: the number of people exposed to an ad, without regard to duplication

Glossary of Terms

influencer marketing: partnering with a prominent social personality (“influencer”) to create content and posts for a brand. Compensation is either paid or in trade for products/services, or a combination of both.

key performance indicator (KPI): key metric(s) you plan to measure to determine the success of a campaign

MoM, YoY, PoP: timeline acronyms for: month over month, year over year, period over period

native ads: an ad that looks to be part of the host site, often presented as an article. These must be clearly labeled as sponsored or promoted.

opt-in: when a user chooses to receive messaging from a company or advertiser

organic social: a brand’s social presence on owned channels, such as the Way to Quit Facebook page

outstream: video/display ad format that fits within natural breaks of website article content

over the top (OTT): content delivered over the internet without the involvement of a cable or satellite operator. Examples of OTT devices include Roku, AppleTV, Chromecast, game consoles, connected TVs. OTT services/apps include Hulu, Netflix, Amazon Prime, HBO Max, Discovery+, Peacock, etc.

page view: each time a full web page loads

paid social: paid advertising opportunities within social media networks

paid traffic vs. organic traffic: paid traffic is website traffic from paid media sources. Organic traffic is those visitors to your website who manually type in the URL. Note that much of the organic traffic is a result of offline paid media efforts promoting WayToQuit.org.

pre-roll: 15- or 30-second video ad that plays before the user’s selected video content; can be skippable or non-skippable.

programmatic: programmatic media buying uses data insights and algorithms to serve ads to the right user at the right time and at the right price. This gives us more control over the inventory and placement of our ads. It’s our preferred digital buying method.

reach: the number of unique individuals or homes exposed to media.

referral traffic: users who come to your domain from other sites, without searching for you on Google

retention: re-engaging users who have taken action and are superfans of your brand; can be effective if the bulk of your searches are happening at specific times

rich media ad: digital ad with motion, and additional features like an embedded video player, game or link to Pages.

real-time bidding (RTB): this is a method of purchasing unsold inventory by CPM through programmatic auction. Your CPM bid may be overruled by other advertisers and is not guaranteed. The highest bid takes inventory priority.

search engine marketing (SEM): examples of SEM are the advertisements that appear on Google Search, Bing Search or Yahoo Search. Your ad would appear based on the search criteria, keywords and your maximum budget.

social bookmarking: aggregation, rating, describing and publishing “bookmarks” – links to web pages or other content

standard display ad unit: an online banner that falls within the usual sizes

Glossary of Terms

streaming audio: streaming audio refers to listening to content that arrives via an over-the-air data connection: in-car Wi-Fi or the data signal from your cellphone. This also includes devices such as smart speakers or desktop.

The Trade Desk: The Trade Desk is a demand side platform (DSP) that uses programmatic advertising for media buying to get more efficient targeting and optimize digital media, allowing us to layer on third-party data across multiple publishers.

unique visitor: someone visiting a website for the first time that day or time period.

video completion rate (VCR): the percentage of times the video played to the end.

view-through click (VTC): helps you measure the effectiveness of your ad campaign. A view-through click would mean that a customer saw your ad, did not click; however, in a later session, visited your website and took action.