

## Digital Technology's (Continuing) Transformation of Radio and TV Broadcasting

**Presented** to:

MIDWEST

David H. Layer Vice President, Advanced Engineering National Association of Broadcasters Washington, DC September 10, 2024





### **AI Radio demonstration**

- Artist will.i.am is demonstrating AI radio using the "FYI" media platform
  - Generative AIPowered by IBM



#### New Audio Platform From will.i.am Emphasizes Interactive AI

RAiDiO.FYI lets listeners chat with AI personas and personalize their own stations

BY RW STAFF PUBLISHED: AUGUST 20, 2024

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Musician and entrepreneur will.i.am has launched a media platform that nods to the power of radio but is Al-driven and accessed via a smartphone app.

The platform is called RAiDiO.FYI.

FYI is the name of a technology company founded by wilLi.am that puts AI to work for creative professionals. RAiDiO.FYI is described as an "AI-infused interactive, conversational media platform that transforms radio as we know it into a new dimension."



will.i.am photo by Sterling Hampton



### Al Radio demonstration





The Future of **Radio** 



### We will Transform Radio...

By putting Ai in Radio to Create RAIDiO.

Everyone will have their very own personal Radio **STAITION.** 

N RAIDIO.FYI

# Welcome to the Revolution.

RAIDIO.FYI is where information and rhythm intertwine, where each listener i at the helm of their audio and info journey. It's not just tech, it's a movemen

You're data is your data Don't let the feed, feed on you...

This isn't a revolution This is EVOLUTION And the EVOLUTION won't be televis It will be LIVE...

Shit just got personal RADIO personalized for you... it's yours...

Ready to change the way the world listens?

This is your moment.





## **Today's presentation**

- Radio and TV digital transitions in the US a brief history
- Trends in digital and hybrid radio
- Virtualization of radio's infrastructure
- Current regulatory topics of interest

• The Broadcast Positioning System (BPS)



Radio®













Guide	Channe	ls					Sat, Sep 7 2:18 PM		
	Settings	Most watched	Channels	Movie	News	Sports	Comedy	Drama	
		Sat, Sep 7 2:00 PM	1			3:00 PM		1	
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Crime 9.2	CRIME	00 <b>Heartland Homicide</b> 19, Ivan Radocaj				00 A Killer's Mistake 5, Chacey Poynter			
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## Transition to digital TV

- US milestones:
  - -1996 FCC adopts ATSC digital television standard
  - -2005 Digital Transition and Public Safety Act of 2005 set transition deadline, establish converter box program
  - -2009 Mandatory US switchover for full-service TV
  - –2010 National Broadband Plan revealed, reallocating 120 MHz of TV spectrum
  - -2017 Incentive auction completed, ATSC 3.0 authorized (voluntary)
  - -2021 US switchover for LPTV and TV translator services





#### WORLD MAP OF DIGITAL TELEVISION TRANSITION PROGRESS







## **Transition to digital radio**

- US milestones:
  - –2001/02 NRSC evaluation of AM and FM-band in-band/on-channel (IBOC) digital radio
  - 2002 FCC authorizes use of AM and FM hybrid IBOC on a voluntary basis
  - -2004 NPR Labs "Tomorrow Radio" project
  - -2005 NRSC-5 Standard adopted
  - -2012-14 NAB all-digital AM field test project
  - -2020 FCC authorizes use of all-digital AM IBOC







## Radio vs. TV digital transitions

- Voluntary vs. mandatory (for stations)
- Proprietary system (HD Radio) vs. industry standard (ATSC)

Parameter	<b>H)</b> Radio®	ATSC	Comments
Digital stations (% of total)	20%	100%	Voluntary for radio
Receiver penetration overall	30% (in cars)	100%	Radio penetration varies by market
Receiver penetration in new cars	50%	n/a	100% for DAB radios in Europe (mandated)
Connected device penetration	< 5%	74% in 2023	"Smart TV" "Hybrid radio"





- More consumer choice ("multicasting")
- Improved picture and sound quality and metadata
- Impact on signal reception
  - -Gradual degradation versus "cliff effect"
- Impact on plant design
  - -IP audio and video distribution
  - -HD2 translator feeds
- (TV) Reallocation of spectrum to other services





## What about datacasting?

- TV: efforts underway to support mobile internet connectivity
  - –2022 test in Michigan demonstrated IP data delivery to moving vehicle across four transmitters using ATSC 3.0

Radio:

- Traffic data delivered to vehicles using HD Radio datacasting (iHeart, BTC)
- Advanced FM modes offer additional throughput







### HD Radio advanced mode testing

		Throughput (kbps)						BW per		
	Backwards							sideband		
Mode	compatibility	P1	P2	<b>P3</b>	P4	S1	Total	(kHz)	Comments	
MP1X QPSK	MP1	98			34		132	96.3	MP1XOV base only	
MP1X 16-QAM	MP1	98			69		167	96.3		
DSB1 QPSK	no	114					114	96.3	Overlay for layered service modes	
DSB1 16-QAM	no	229					229	96.3		
MS5 QPSK	no					114	114	96.7	No primary sidebands	
MS5 QPSK	MP6	50	49			114	213	193.0	MP6 mode for primary sidebands	
MS5 QPSK	no	229				114	343	193.0	DSB1 mode for primary sidebands	
Layered (hierarchical) modulation modes:										
		Throughput (kbps)						BW per		
	Backwards							sideband		
Mode	compatibility	P1	P2	P3	P4	POV	Total	(kHz)		
MP1XOV	MP1	98			34	114	246	96.3		
MP6OV	MP6	50	49			114	213	96.3		
DSB10V	no	229				114	343	96.3		

### Layered (Hierarchical) Modulation

- Backward-compatible means of significantly enhancing capacity by simultaneously sending two service modes
- "Overlay" DSB1 QPSK on top of existing "Base" service mode
- Legacy receivers detect Base; Advanced receivers also detect Overlay for additional capacity







## **Digital transition #2**

Internet delivery of video and audio ("streaming")

• TV:

- -Smart TVs and "apps"
- -Free ad-supported streaming TV (FAST)
- Radio:
  - Hybrid radio (DTS AutoStage, Radioplayer)
  - -Internet radio in the vehicle
  - -Podcasting

### The **Roku** Channel





## **Share of Audio Listening Time by Platform**

#### U.S. Population 13+ Music **Owned Streaming Sirius Channels** AM/FM Music Music on TV XM Other 2014 5 51 18 11 7 2024 14 10 36 20 8 6 3 **Podcasts** YouTube STREAMING Audiobooks + PODCASTS 13% TO 30% edison Source: Edison Research Share of Ear® 17



# The Gauge<sup>™</sup>

Nielsen's Total TV and Streaming Snapshot

### June 2024

Total Day | Persons 2+

Linear Streaming (VMVPD/MVPD) Apps have been removed from the Streaming category. They have also been removed from Other Streaming and Hulu and Youtube now reflect usage to Hulu SVOD and Youtube Main without their respective VMVPD's (Hulu Live and Youtube TV).

Methodology available @ www.nielsen.com/thegauge Source: Nielsen National TV Panel Data plus Streaming Video Ratings Percentages may not sum to 100 due to rounding Copyright © 2024 The Nielsen Company



## Thursday, September 5

## Podcasting breaks 50% barrier, reach-

## <u>ing a majority of American adults</u> <u>(Sounds Profitable)</u>

"Podcasts now reach 53% of Americans 18+ every

month – the first report of monthly consumption

reaching the majority of adults in the US."







## What is the impact?

- More consumer choice
- Improved picture and sound quality and metadata
- Interactivity and analytics
- Revenue opportunities for automakers
  - -"Pre-rolls"
  - -Video and audio advertising
- "Cord-cutting"





## **Broadcasters and streaming**

- For TV broadcasters smart TVs

   ATSC 3 compatible TVs combine OTA and streaming
   Broadcasters are depleting Nexteres TV ("appe")
  - -Broadcasters are deploying Nextgen TV "apps"



News > NextGen TV

### CES2024: 100+ NextGen TV Products Will Be Available to Consumers in 2024

By George Winslow published January 8, 2024

TCL joins Sony, Samsung, and Hisense with integrated NextGen TV receivers as lineup of receivers grows to include ADTH, Stavix, Zapperbox, and Zinwell







Powered with **DEXTGENTVE** 

(i) What is this







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MALIVE Dateline 12:00PM - 1:00PM

#### Paris 2024 Summer Olympics

Previewing the 2024 Paris Par.



Local

Suspect accused of dumping gun in drain turns self in to police

1 HOUR AGO

**Digital Originals** 

HOURS AGO

Living in L'Enfant's dream Al.





it's









## **Broadcasters and streaming**

- For radio broadcasters streaming more problematic
  - -Performance royalties for streaming music
  - Hybrid radio systems support streaming (service following) and nonlinear content but mostly linear for now
- Valuable opportunities
  - -Non-linear content (especially podcasts)
  - -Interactivity
  - -Listener analytics

## **STATION FOLLOWING**

#### EXTENDED COVERAGE AREA

Seamless transition between overthe-air broadcast and IP content delivery.



**XPERI** 

Driver tunes to station and drives outside of traditional broadcast range





Broadcast

Audio will switch from OTA to Internet stream if available and enabled Web Stream

3

If/when vehicle reenters radio frequency coverage, source of audio switches back from Internet to OTA. Broadcast



# **RADIO PODCASTS GAIN POPULARITY**

How many different podcasts do radio stations run per week?



## INSIGHTS

- Podcasts get more attention on radio than TV stations
- The average number of radio podcasts is 2.4 this year
- Median number of podcasts is one, up from zero

#### **RADIO ONLINE**

SOURCE: RTDNA/NEWHOUSE SCHOOL AT SYRACUSE UNIVERSITY SURVEY, AUGUST 2024







## **Today's presentation**

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- Trends in digital and hybrid radio
- Virtualization of radio's infrastructure
- Current regulatory topics of interest

• The Broadcast Positioning System (BPS)



**HD** Radio<sup>®</sup>





## Trends in digital and hybrid radio

- Digital radio transition faces challenges
  - -Receiver penetration is increasing BUT
  - Largest US automaker (GM) including digital radio only in select, highend models
  - -Broadcaster adoption is low and still around only 20%



## Radio station adoption of digital radio 2018-2024



11111





## Trends in digital and hybrid radio

- Digital radio transition faces challenges
  - -Receiver penetration is increasing BUT
  - Largest US automaker (GM) including digital radio only in select, highend models
  - -Broadcaster adoption is slow and still around only 20%
- Google's recent incorporation of HD Radio functionality within Android Automotive is an important step





Ford's new Android-powered infotainment system is finally coming to a Ford-branded vehicle. <u>The automaker's so-called Digital Experience</u>, which debuted with the 2024 Lincoln Nautilus earlier this year, will power the new 2025 Ford Explorer SUV, the company announced today.

The 2025 Ford Explorer includes many of the Digital Experience's main features, including built-in Google Maps, Google Play Store, Google Assistant, wireless CarPlay and Android Auto, and digital HVAC controls. It doesn't have <u>the extravagant 48-inch panoramic screen setup</u> that the Lincoln Nautilus has, but from the looks of it, the main 13.2-inch touchscreen has the same interface. And the Explorer's 12.3-inch digital instrument cluster can project maps for the first time.





## Trends in digital and hybrid radio

Dashboard displays continue to increase in size
 Radio needs to look as good as it sounds



### 2025 Lincoln Navigator – 48" panoramic display

66° Bruce Township

Spotify My Time

 $\cap$




#### Trends in digital and hybrid radio

• More broadcasters earning revenue with metadata







#### Trends in digital and hybrid radio

- Station lists are becoming the standard way to navigate and discover radio in the car
  - -Good for multicast channels
  - -Results are not always good
  - -Hybrid radio station lists are outstanding

2024 Toyota Tacoma – station list



#### 2023 Mercedes EQS 580 – now playing screen



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FM AM SXM Presets		€ 1:38 PM, Dec. 5
FM 101.1 DC101 Washington DC's Alternative Rock	1 6	FM H) 1
FM 101.1 104.7 WONK-FM Smart People. News.	HD 2 50	03 0 43 15-
FM 101.9 Today's 101.9 Baltimore's at work variety from the 80's to now	1 Lo	UUU
PRAISE FM 101.9 Praise 106.1 Bold and independent	10 2 Co	93.9 WKYS (FM 93.9) Tomorrow 2
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Flashback Channel	103 20	
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### Trends in digital and hybrid radio

Analytics from hybrid radio



- Available to broadcasters who become "content partners" with Xperi
- Radioplayer (not currently available in the US but is available in Canada) is developing analytics offering for its broadcaster partners

#### DTS Broadcaster Portal Onboarding

We are glad you've chosen to become a content partner. In a few short clicks you will **take control of your stations and how your data is presented** in DTS AutoStage enabled cars through the DTS Broadcaster Portal.

Continue with a login

Start onboarding  $\rightarrow$ 

Not ready to join yet? Read more about our award-winning DTS AutoStage here.









- Gaming and video services being introduced
  - -Xperi will be featuring gaming for the vehicle at the 2025 CES
  - -VW will soon support multiplayer games using smartphones as controllers
  - -BMW offers DTS Autostage video

**OCES** 



Source: https://www.engadget.com/transportation/vw-is-bringing-casual-multiplayer-games-to-evs-and-other-cars-090034594.html

## **DTS AutoStage: Immersive Entertainment**





# **Today's presentation**

**HD** Radio<sup>®</sup>

ATSC)

- Radio and TV digital transitions in the US a brief history
- Trends in digital and hybrid radio
- Virtualization of radio's infrastructure
- Current regulatory topics of interest

• The Broadcast Positioning System (BPS)





- Infrastructure has undergone its own digital transition
  - -IP audio
  - -Automation systems
  - -etc.
- Latest transition is to a virtualized environment
  - NAB is involved through its work with the NAB Radio Technology Committee (NABRTC)





- Example Nielsen Portable People Meter (PPM) encoders
  - -From hardware to software
- Certified vendors include:
  - -ATC Labs Orban Thimeo Wheatstone
  - -RCS Sound Software Telos/Omnia

#### **Nielsen Radio Certified Vendors**

OEM ♦ Vendor	Product 🔶	Product Version ♦	AM \$	FM ¢	HD ¢	Internet Streaming	Domestic <b>\$</b>	International 🕈	Radio Encoding <sup>♦</sup>
ATC Labs	Perceptual SoundMax	2.12			1	1	~	√	1.1.7
	Cound								







- Example EAS
  - Hardware EAS encoders/decoders are currently a requirement under FCC rules
  - This creates problems for broadcasters as many air chains are now implemented in software
- NAB is proposing that the FCC allow use of software-based EAS encoders/decoders
  - -Host of benefits would be realized





#### **EXISTING**



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- Example "next-gen transport"
  - –NRSC and IEEE Broadcast Technology Society Standards Committee are pursuing draft standards for next-gen transport
  - Key attribute MPX and HD Radio E2X data combined into a single IP stream
  - Eliminates timing problems (and the need for corrective action) relating to analog-digital blending

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Broadcast Technology Standards Committee





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#### FM digital power increase proceeding

- MB Docket No. 22-405
- FCC accepted comments and replies on FM digital power increase NPRM clarification in April 2024
  - -Goals are to increase no. of stations that can operate at -10 dBc, allow for asymmetric sideband operations
- Later this month, FCC votes to authorize use of asymmetric sidebands
  - -Experimental authorization no longer required





### FM digital power increase proceeding

- Two principal objections to power increase portion of NPRM:
  - -Press Communications (NJ) impact on class A stations
  - "Aviation parties" FM interference into 108-118 MHz Aeronautical Radio Navigation Service (ARNS) band
- This is the first time since IBOC was authorized in 2002 that any concerns have been expressed regarding ARNS
- Aviation parties include:
  - The Air Line Pilots Association International The Boeing Company Airlines for America
  - Garmin International, Inc. Aviation Spectrum Resources, Inc. General Aviation Manufacturers Assn.

#### **Illustration of IBOC signal encroachment into ARNS band**







## FM digital power increase proceeding

- NAB and Xperi are working with Aviation Parties to update test procedures
  - -Developed HD Radio signal test vectors
  - -Reviewing compatibility test plan (updated to include HD Radio)
- FCC action on digital power increase request likely a year or more away





#### FM booster content origination

- New rules effective May 16, 2024
- Process:
  - –License booster(s)
  - File for experimental authority to originate programming
- No stations have yet filed for experimental authority to do this







#### **FM** booster content origination

- Checked FCC License Management System (LMS) for booster applications since April
   Icensing and Management System
  - Stations in table were mentioned in June and September RW articles as interested in Zonecasting

		# of			
No.	Call sign	boosters	Owner	City	State
1	KLCY	4	Ashley Communications, Inc.	Fort Duchesne	UT
2	KDDS	3	Bustos Media	Centralia	WA
3	KZTM	3	Bustos Media	Centralia	WA
4	WEIB	8	Cutting Edge Broadcasting, Inc.	Springfield	MA
5	KKFT	2	Evans Broadcast Company, Inc.	Stateline	NV
6	KRFN	3	Evans Broadcast Company, Inc.	Carson City	NV
7	KAFF	6	Great Circle Media	Sedona	AZ
8	KADD	7	Radio Activo 2, LLC	St. George	UT
9	WRBJ	5	Roberts Radio Broadcasting, LLC	Jackson	MS
10	WKTT	4	Rojo Broadcasting, LLC	Princess Anne	MD
11	KPKL	1	Spokane Broadcasting Company, LLC	Spokane	WA





#### FM booster content origination

- FCC is currently developing final rules for booster content origination
- NAB hopes to do interference testing in 2025
  - -Would visit operational system
  - Would have to temporarily operate booster-originated content for more than 3 minutes per hour





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• The Broadcast Positioning System (BPS) ATSC)



# Broadcast Positioning System (BPS)

**Tariq Mondal** 

Vice President, Advanced Technology National Association of Broadcasters







#### Loss of GPS is Catastrophic

#### GPS can be jammed and spoofed

Power grid will fail

Cellular network will lose capacity

#### Financial trading will halt

Billions of dollars of economic loss







#### **Executive Order by the President**

- Executive Order 13905 of February 12, 2020
- Strengthening National Resilience Through Responsible Use of Positioning, Navigation, and Timing (PNT) Services
  - The Director of the White House Office of Science and Technology Policy will develop a national plan for research and development (R&D) and pilot testing of alternative PNT services, reducing dependence on Global Navigation Satellite Systems (GNSS)











Works without GPS, internet, or cellular connectivity







ALLESS





#### **Advantages of BPS**











#### **BPS (UHF & VHF) Coverage at Full Deployment**



#### Coverage at 1.5 m antenna height:

At demodulation threshold (-5 dB SINR)
 Threshold + 10 dB
 Threshold + 20 dB


## **Broadcast Positioning System status**

- Long list of accomplishments:
  - Developed transmission side BPS hardware and software, functional BPS receivers
  - Deployed BPS at WHUT (Washington, DC); it has been running 24/7 for 5 months, achieving 40 ns accuracy
  - Deployed BPS at KWGN (Nexstar station in Denver, CO), preparing for WNUV (Sinclair station in Baltimore, MD) deployment in September





EXHIBITS: OCTOBER 9-10, 2024 EDUCATION: OCTOBER 8-10 JAVITS CENTER | NEW YORK, NY



# 2024 NAB Show NY

NA

• October 8-10, 2024, Javits Center -Co-located with the AES Show 2024 NY



- -NRSC Wednesday, October 9th, 2-4:30PM EDT (open to all)
- NABRTC Thursday, October 10th, 10:30AM-1PM EDT (NAB members only)
- -NABTVTC Thursday, October 10th, 2-4PM EDT (NAB members only)



# 2024 NAB Show NY

• Exhibit hall is combined for NAB and AES events



NA

- NAB sessions for radio:
  - -Radio & Podcast Interactive Forum (paid, \$349 for an NAB member)
  - -No radio technical sessions
  - -3 theaters on exhibit floor, 30+ presentations on various topics

### 5 Results for Radio & Podcast Interactive Forum



#### SESSION NAME (5)

Wednesday, Oct 9

Time	Session/Event	Location
10:00 AM - 10:40 AM	It Takes a Team: How Talent Works Across the Team to Create Winning Shows	<u>3D09</u>
10:45 AM - 11:30 AM	How Marketing and Technology Work Together to Grow and Engage Audiences	3D09
12:30 PM - 1:20 PM	The New Playbook: Producing Innovative Sports and News Content	<u>3D09</u>
1:25 PM - 2:15 PM	Innovative Sound Design and Video Strategies for Radio and Podcasts	3D09
2:20 PM - 3:10 PM	Leveraging Data Insights to Improve Programming, Promotions and Bottom Lines	3D09



# Summary

Radio

ATSC)

- Digital transitions are tough!
- Radio broadcasters need to:
  - -Make sure their station looks as good as it sounds
  - -Think about non-linear opportunities like podcasting
  - -Make use of hybrid radio analytics
  - -Consider virtualizing operations

• Thanks for inviting me today!

# NATIONAL ASSOCIATION OF BROADCASTERS