

PRESENTED BY:

Jennifer Breault | VP, Sales Grocery and Shopper Marketing

Sarah Burke | Director, Brand Partnerships Grocery and Shopper Marketing

BrandStorm

A *Fresh* Perspective

March 15, 2021

 **iHeartMEDIA**

Marketing Trends



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“

One thing is sure—whatever marketing playbook you had before the crisis, it will need to be rewritten.

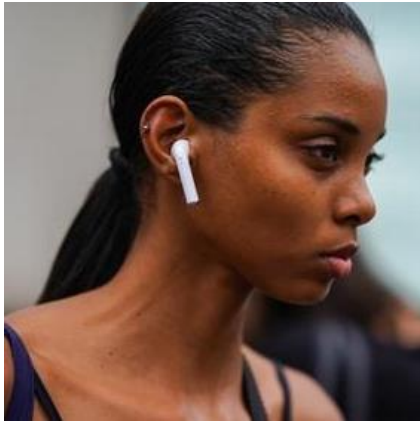
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BOB PITTMAN
CEO IHEARTMEDIA

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The **Audio Revolution** Is Here

OUR EARS ARE
ALWAYS CONNECTED



Bluetooth Earphones
300M Total Sold Globally¹

RAISING AUDIO-
FIRST GENERATION



Smart Speakers in 50%
of American homes,²

PODCASTS ARE FASTEST
GROWING MEDIUM



**61% Of Weekly Podcast
Listeners Say it's a
Daily Routine³**

SOCIAL AUDIO IS NEXT



Clubhouse, the Invite-
only Audio Chat App was
Recently Valued at \$1B⁴

“Screen-free Media”

Voice and audio have gotten an unexpected boost from the pandemic.

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How Do You Break Through?



- 01** Ad-supported television down **30% year over year** even during COVID-19 where consumers are trapped at home.¹
- 02** Radio is the most trusted medium. The power of audio platforms are **driven by Influencers across Audio, Podcasts and Social.**
- 03** Every brand is in the game too, competing for **online attention and sales** in all the same places.
- 04** Covid 19 has disrupted brand loyalty and **30% of consumers are expected to continue to sample new brands. Now is not the time lose out.**³



A close-up photograph of a hand reaching into a bin of red tomatoes in a grocery store. The background shows other produce bins and price tags, all with a warm, reddish-orange color cast.

Trust

A photograph of fresh produce including a bunch of carrots, several green peppers, and a few purple and red apples. The entire scene is overlaid with a solid blue color.

Attention

A photograph of a woman and a young girl shopping together in a grocery store. The woman is smiling and holding a plastic bag, while the girl looks on. The background shows shelves of produce. The entire scene is overlaid with a warm, golden-yellow color.

Connection

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Consumers Are Turning To Brands They TRUST

Brands need to reach consumers with the the right marketing messages across platforms.

BRING PEOPLE TOGETHER

83%

want brands to connect people and help them stay emotionally close to earn or keep their trust.



GRABS ATTENTION



THE AVERAGE ATTENTION
SPAN OF A HUMAN IN
2000



THE AVERAGE ATTENTION
SPAN OF A HUMAN
NOW



AND...

THE AVERAGE ATTENTION
SPAN OF A
GOLDFISH



Comedy
continues to help
us frame the
world we live
through everyday.



4 in 5 Americans are desperate to be cheered up after a difficult 2020.

Comedians are making the insanity of today's day-to-day tolerable.

No matter the flavor, we turn to our favorite **comedy content** after the news reports.



Q&A

Jennifer Breault | VP, Sales | JenniferBreault@iHeartMedia.com
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AMERICA'S #1 AUDIO COMPANY

REACHING 9 OUT OF 10 AMERICANS EVERY MONTH | RADIO • PODCASTS • DIGITAL • SOCIAL • INFLUENCERS • DATA • EVENTS

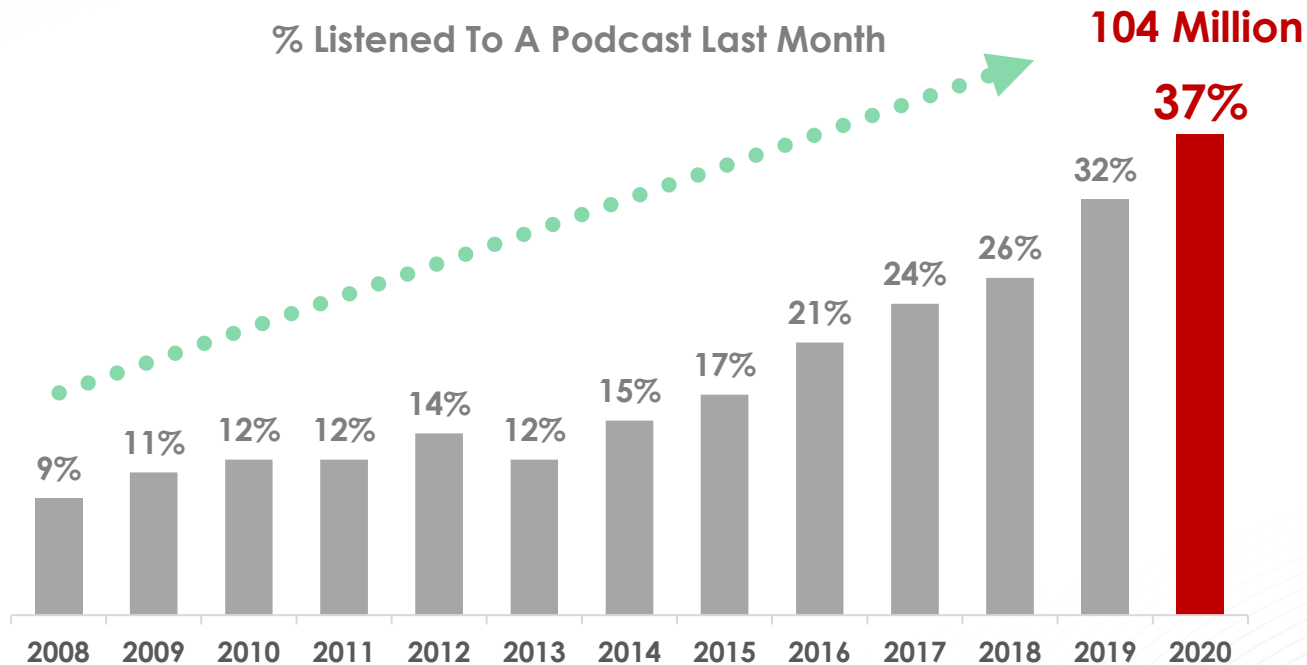


Digital Revolution

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Podcast Listening Is No Longer a “Niche” Medium



Already Bigger than Streaming Services

Ad-Enabled Reach



26%



18%

Of Weekly Podcast Listeners

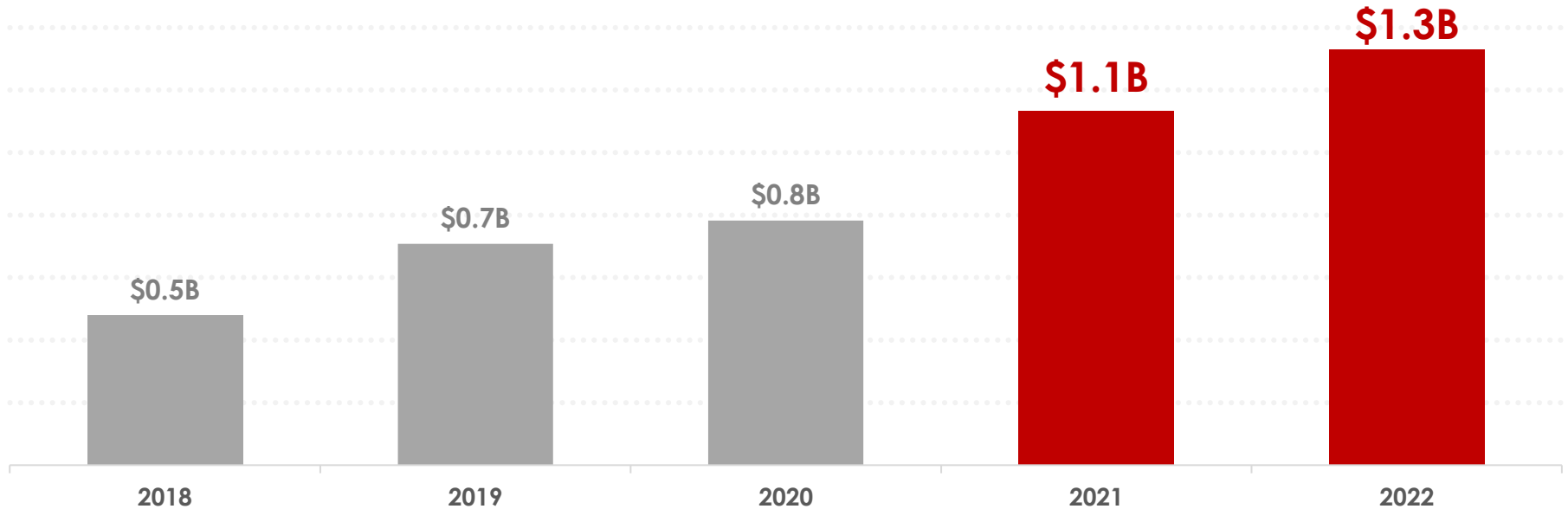
68% listen to 3+ podcasts a week

30% listen to 6+ podcasts a week,

All Listen for almost **7 hours/week**

Podcast Revenue Is Expected To Hit \$1B+ in 2021

Podcasting Advertising Revenue





61%



61%



60%



58%



57%



57%



57%



56%



56%



56%



54%



53%



53%



52%



52%



51%

Podcasts Reach TV's Unreachable Audience

Light TV Viewers Are
+20%
 More Likely To Listen To
iHeartMedia Podcast Network

*Read As: 58% of Stuff You Should Know's Audience Is Made up of Light TV Viewers

Source: Scarborough Podcast Recontact Study (USA+) 2019 Release 2
 Light TV Viewers; National Television 5th Quintile or household does not subscribe to TV service

Influencers Aren't
Just on Social Media

Power of Influence

- **79%** of Listeners value Personalities opinion and perspectives.
- **66%** Considered or purchased a product recommended by their favorite personality.



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Podcasts and Smart Speakers Connect With The Grocery Consumer

A18+

	Podcast Listeners	Smart Speaker Owners
SHOPPED AT ANY GROCERY STORE IN PAST 7 DAYS	99% Of Listeners	99% Of Owners
SHOPPED AT PUBLIX IN PAST 7 DAYS	110 Index vs. A18+	127 Index vs. A18+
SHOPPED AT SAFEWAY IN PAST 7 DAYS	132 Index vs. A18+	118 Index vs. A18+
SHOPPED AT TRADER JOES IN PAST 7 DAYS	198 Index vs. A18+	161 Index vs. A18+
SPENT \$200+ ON GROCERIES IN PAST 7 DAYS	105 Index vs. A18+	122 Index vs. A18+



Listeners Take Action After Hearing A Podcast Ad

Action Item	% Podcast Listeners	% Heavy Podcast Listeners
Searched online for more information about the product or service	39%	54%
Found out about a product/service you had not heard of before	32%	39%
Talked to my friends about the product or service	25%	37%
Purchased the product/service at a store or online	22%	34%
Used a promotional code at checkout when purchasing the product or service	21%	33%
Followed the product or service on social media	20%	33%
Took Any Action	68%	85%



It's a Good Time to Take a Fresh Look at Podcasting



More Trackable.

Podcasts are more trackable than ever before, with reporting and dashboards that look like traditional digital media

More Targeted.

You can geo-target, audience target or contextually target

More Streamed.

Most podcast consumption now is live-streamed, so it's actually, really consumed

More Attributable.

Attribution is more sophisticated than it's ever, partnering with best-in-class to bridge the podcast consumers to other platforms, as needed

Brands are **Fighting for Consumers Attention**

-

Podcasts are the fastest growing medium, with 61% Of Weekly Podcast Listeners Saying it's a Daily Routine

-

Here's Your Chance to Align with Culture Makers and Break Through.





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A photograph of a woman and a young girl shopping in a grocery store. They are standing in front of a large display of fresh fruit, including apples and lemons. The woman is smiling and looking at the fruit, while the girl is also looking at the fruit. The woman is holding a plastic bag filled with produce. The background is slightly blurred, showing other shelves of produce in the store.

Strategic Ways to Market to Shoppers

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Consumer Behavior Has Shifted

How Do You Capture These New Shopping Habits, As Consumers Define Their New Normal?

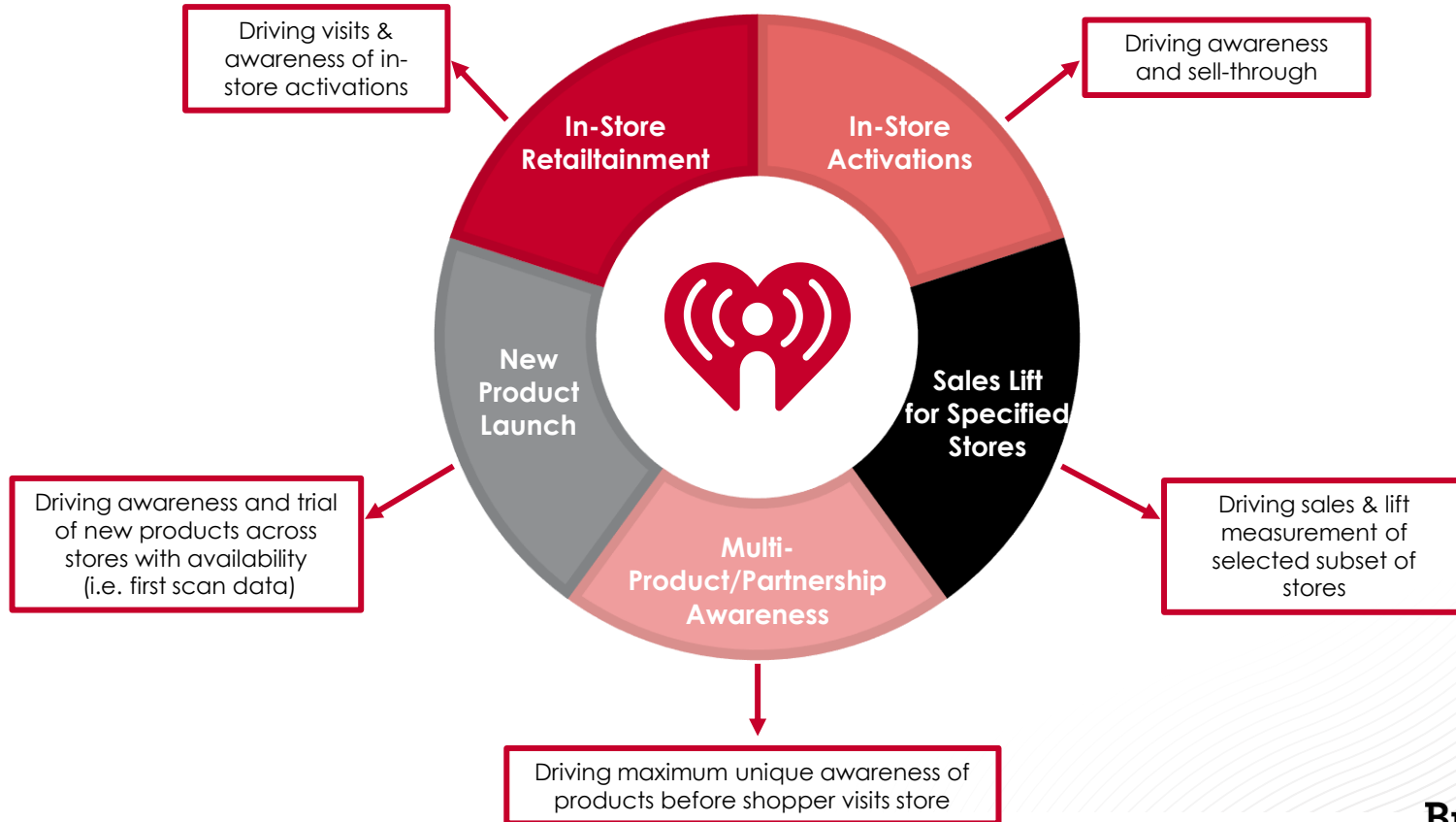
Insight: The Path to Purchase Institute (P2PI) survey of 1,001 primary household grocery shoppers found that shoppers:

- **Continue to plan their trips** (31% make a shopping list)
- **Compare prices** (22% compare stores' prices)
- **25% moms who experienced curbside pick-up** said they expect to continue using the service after they are released to shop more freely.















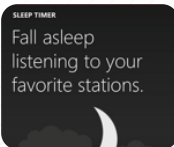
How We Are Working With Grocery Partners



How to Activate Shoppers



Reaching The Connected Grocery Consumer

6a to 9a	9a to 12p	12p to 3p	3p to 7p	7p to 12a
<p>Rise & Shine</p> 	<p>Start of The Workday</p> 	<p>Refuel & Recharge</p> 	<p>Commute Home</p> 	<p>Personal Time</p> 
<p>Morning Rituals</p> 	<p>Mobile/Desktop Browsing</p> 	<p>Lunch & Errands</p> 	<p>Evening Commute & Shopping</p> 	<p>Smart TV/CTV</p> 
<p>Drive to Work & Kids to School</p> 	<p>Smart Speakers at Work or Home</p> 	<p>On The Go</p> 	<p>Dinner</p> 	<p>Bedtime</p> 

Activate In Market Shoppers

Communication designed to engage active shoppers in real-time

Efficiency of Broadcast

Build your brand and drive call to action with the mass reach, scale and efficiency of broadcast audio

Location Based Targeting

Engage with In-Store and Pick-Up Shoppers separately using location data

Influence & Context

Align with specific influencers, broadcast shows, and podcasts to generate trust and relevance for your brand

Targeted Email

Reach highly targeted, responsive prospects more cost efficiently than your weekly circular print ads with full service and permission-based Acquisition Email Marketing

Digital Audio

Engage with targeted digital audiences, demos and geos across Streaming & Podcasts

PromoBuilder

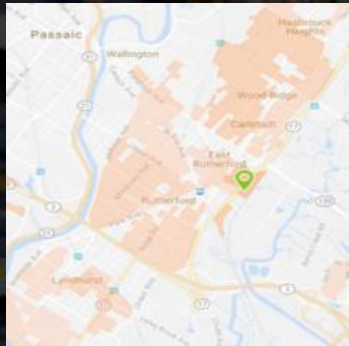
Connect with and reward your most responsive consumers via turnkey, custom-created sweepstakes designed to drive awareness and increase your email database & social fans

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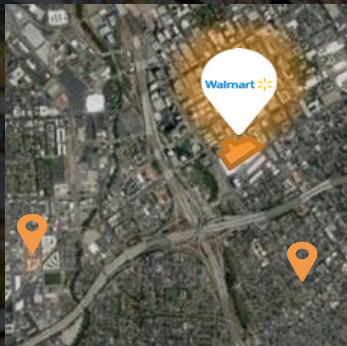
Strategic Tactics For Different Moments

List Building Moments



Target shoppers in key areas with our **Neighborhoods Targeting** solution.

Routine Moments



Leverage **location-based and behavioral Blueprints™** to target known shoppers of the specified stores

Purchase Moments



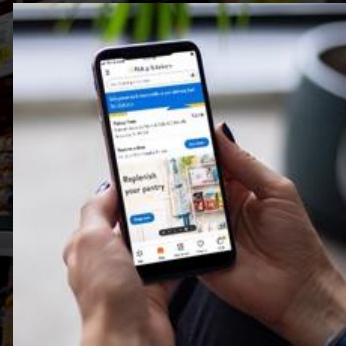
On-Premise Targeting brings your products top of mind & making it easy to find & purchase in-store.

Pickup Moments



Utilize **Blueprints™** of specific retailers Pick Up lanes to **reach Pick-Up Audiences** while they build their list for the next pick-up trip

Browsing Moments



Customize **APP User-Based Audience Targeting** to connect with known app users of the specified apps as well as regular purchasers of your brand.



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