

# America's largest Digital Audio offering



**KATZ** DIGITAL

Innovating at the  
Speed of Sound

# Technology is Driving an Audio Renaissance

Hardware advances every decade provided more ways to listen

The pandemic has enabled new devices to enter people's comfort zone



**2000**

Computers enable streaming to bring digital audio into the workplace



**2010**

Smartphones enable us to take audio with us everywhere



**2020**

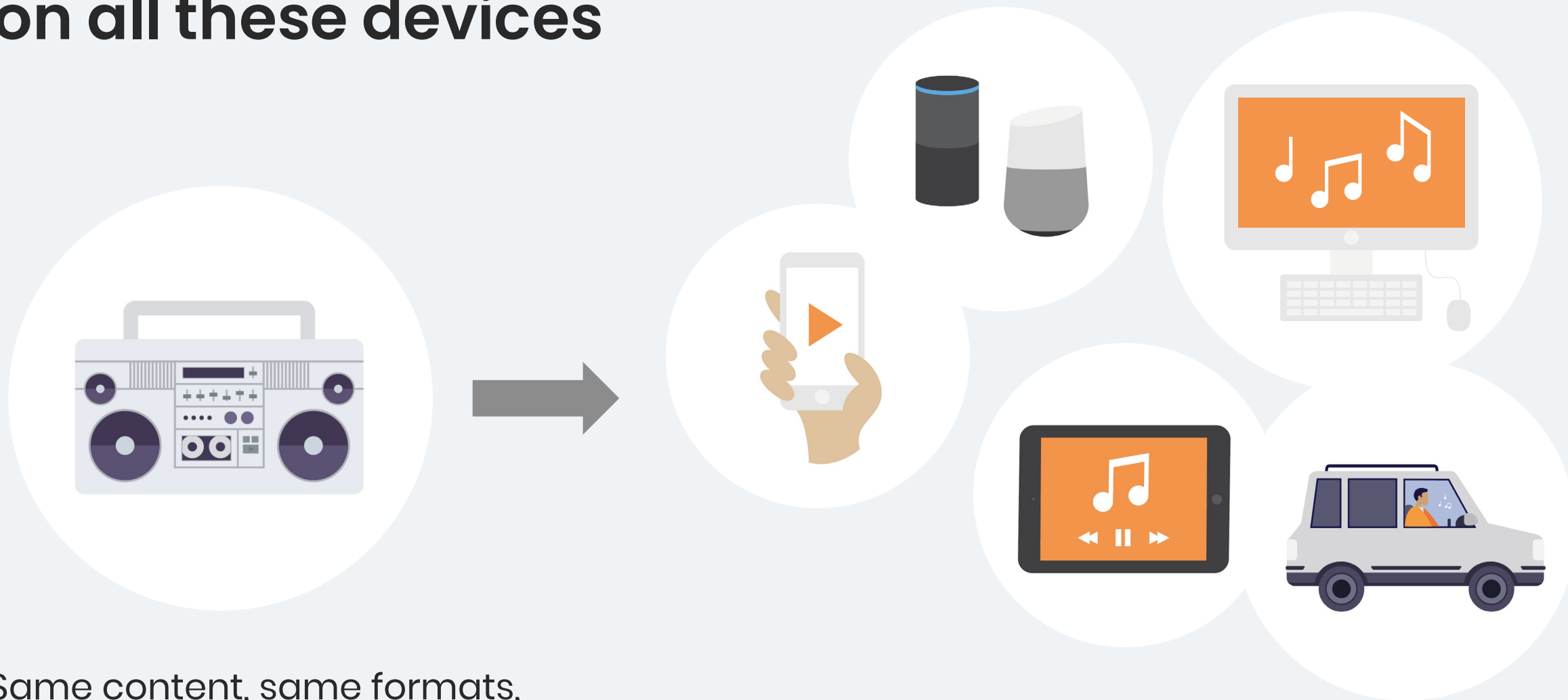
Smart Speakers bring audio back into the home, creating more listening



**2025**

Auto dashboards will go digital through WIFI Hotspots, 5G & Voice Assistants

# Digital Audio IS Radio today— on all these devices

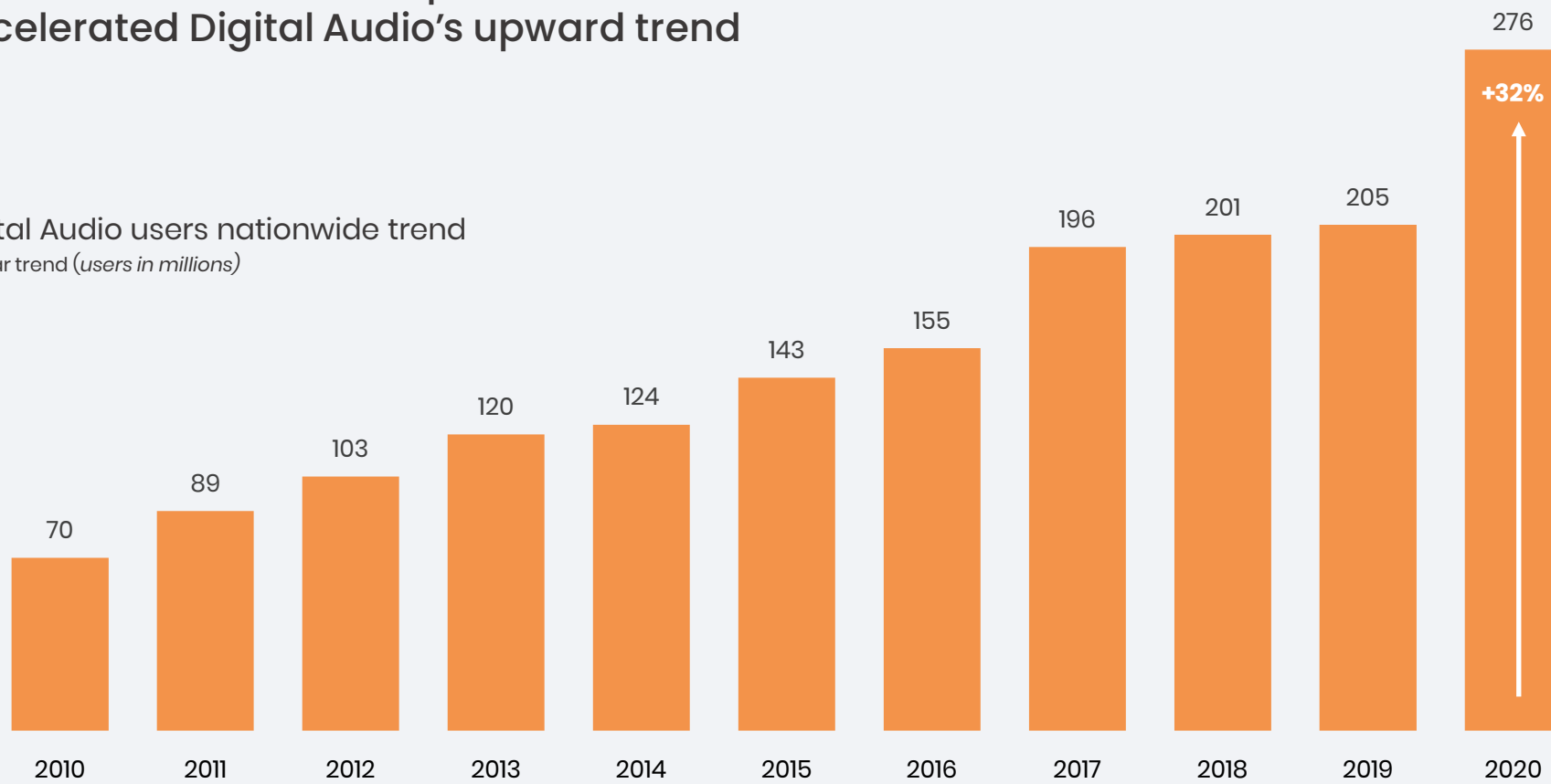


Same content, same formats,  
same emotional connection... *Different ad units*

# 2020 Intensified Digital Audio's Growth

The Covid-related 2020 spike  
accelerated Digital Audio's upward trend

Digital Audio users nationwide trend  
10-year trend (users in millions)



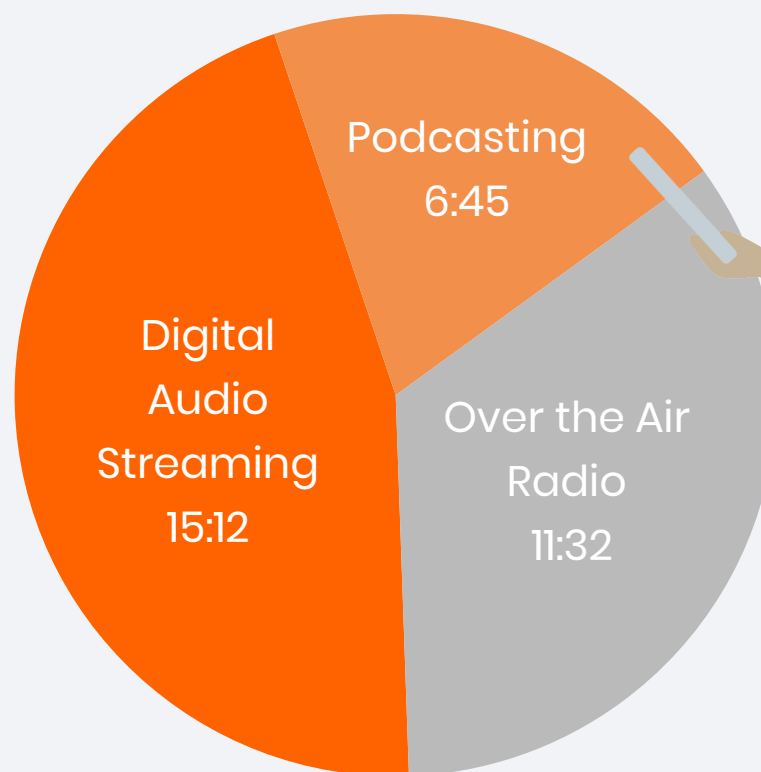
Source: 2009–2016 Edison Research; eMarketer 2010–2019. 2020: comScore custom study % gain applied to Edison's users.

# Engagement with Digital Audio climbs to new heights

66% of Audio Time-Spent is now on Digital Devices

One year engagement growth:

- Digital Audio +55%
- Podcasting +150%



Time Spent Hours:Minutes

# Digital Audio is Growing Fastest of any medium

% of population who have increased Medium's usage "to a larger extent"

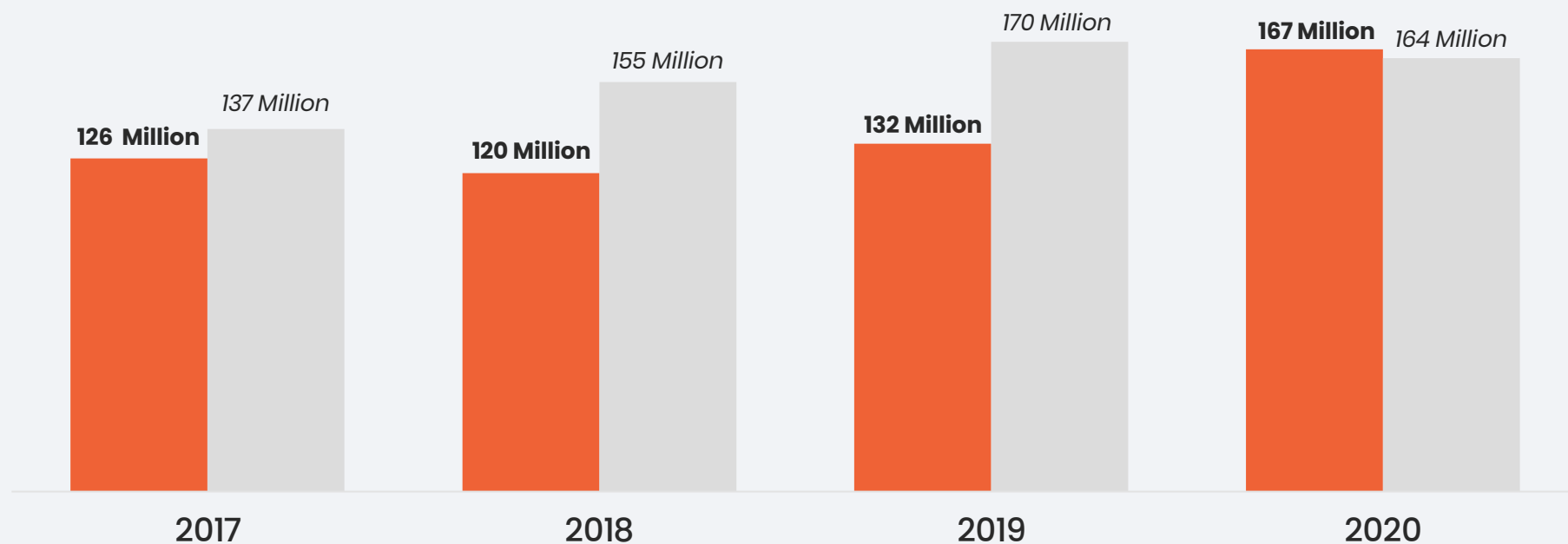


# Broadcast Streams are driving Digital Audio's Growth

## Broadcast Streams vs. Pureplays

2017–2020

● Broadcast Streams ● Pureplays



ComScore monthly unique visitors. Total persons, July data from each year is compared. Broadcast Streams are represented by Katz Digital (reaches 96% of that space). Pureplays is Spotify, Pandora, Soundcloud, Apple Music and Tidal, deduped

# At Home and In Car usage is driving Digital Audio's growth today

## AT HOME

**Smart Speaker**  
Audio users

**UP 285%**

**Connected TV**  
Audio users

**UP 24%**

## IN CAR

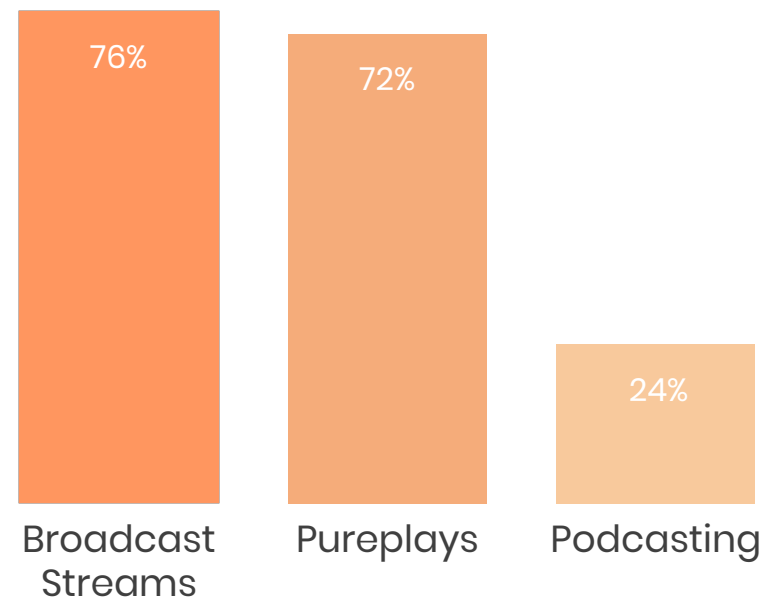
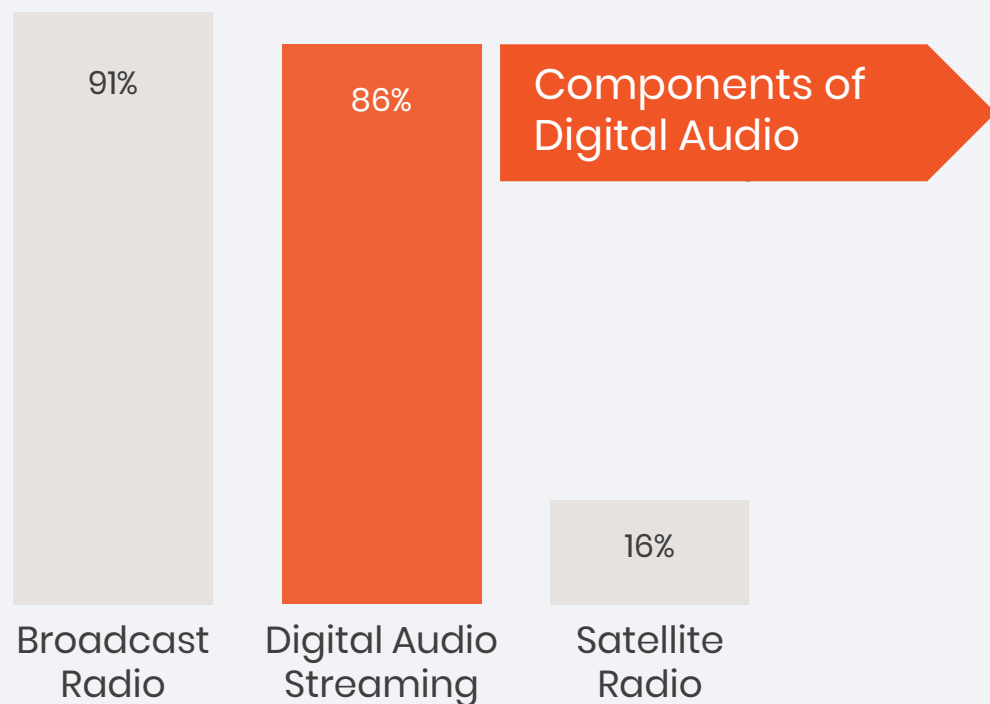
**In-Dash and Bluetooth**  
Audio users

**UP 57%**



# How Americans Use Audio Today

% of Adults 25-54  
reached by all audio types



To Be Read: 86% of American Adults 25-54 stream digital audio, 76% of these digital streamers use AM/FM Digital stations; 72% stream pureplays, 24% listen to Podcasts, etc.

Source: Scarborough 2020.1 (note: percentages add to significantly more than 100% because of robust cross-channel usage)

# Katz Digital is America's Largest Digital Audio Platform

Broadcast Streams | Pureplays | Podcasting



**225+**

Million Users

**200+**

Markets Reached

**5,000+**

Broadcast +  
Pureplay Affiliates

**100,000+**

Podcasts

# Scale Matters

We reach 225+ Million Americans

- Full U.S. Coverage – no gaps
- Ethnically representative
- Unmatched ability to target



# Katz Digital is one of the Giants of Digital Media



271 Million



255 Million



227 Million



218 Million



207 Million



207 Million



202 Million



190 Million



185 Million



175 Million

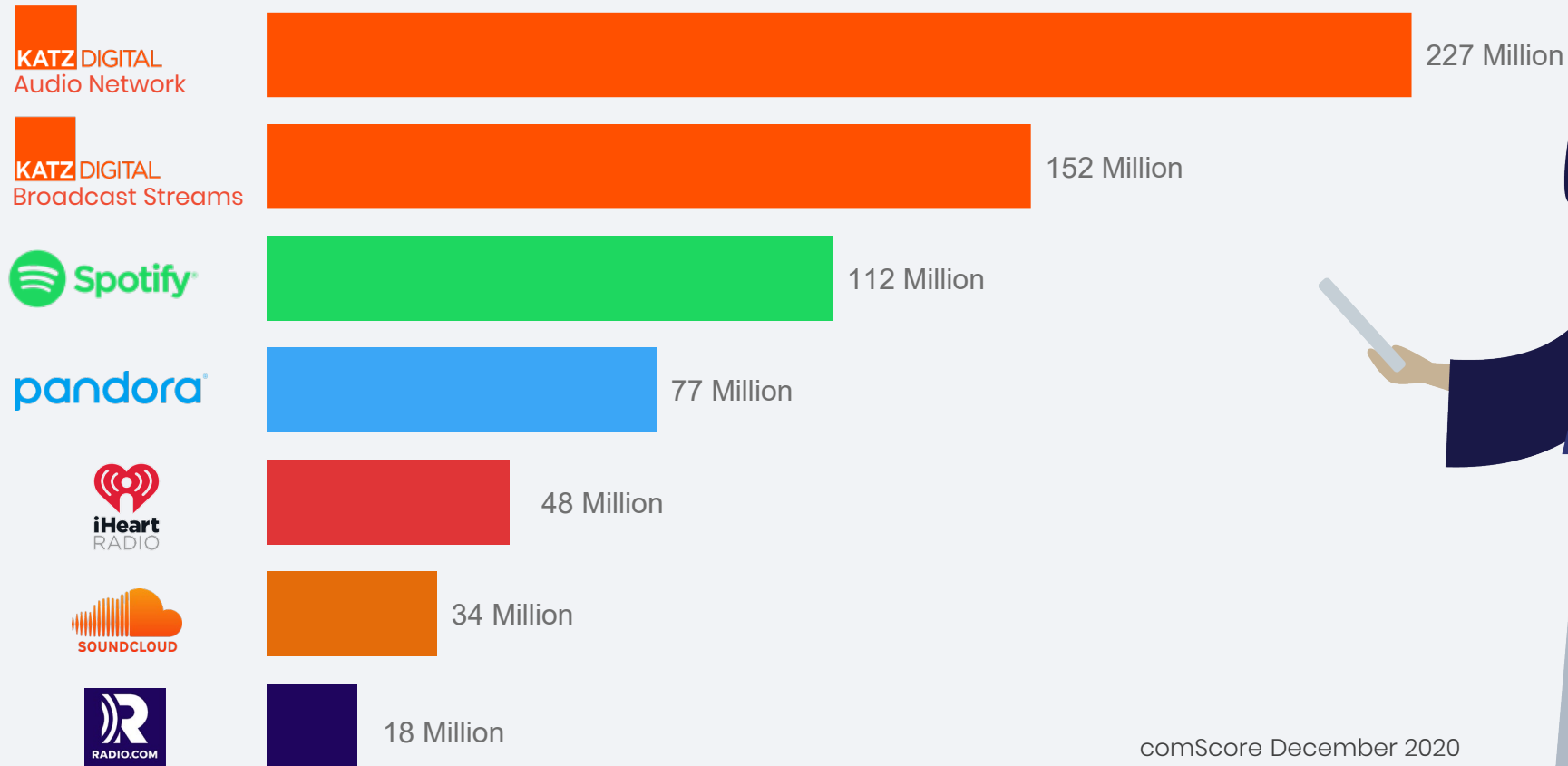


141 Million



94 Million

# Katz Digital Dominates Digital Audio



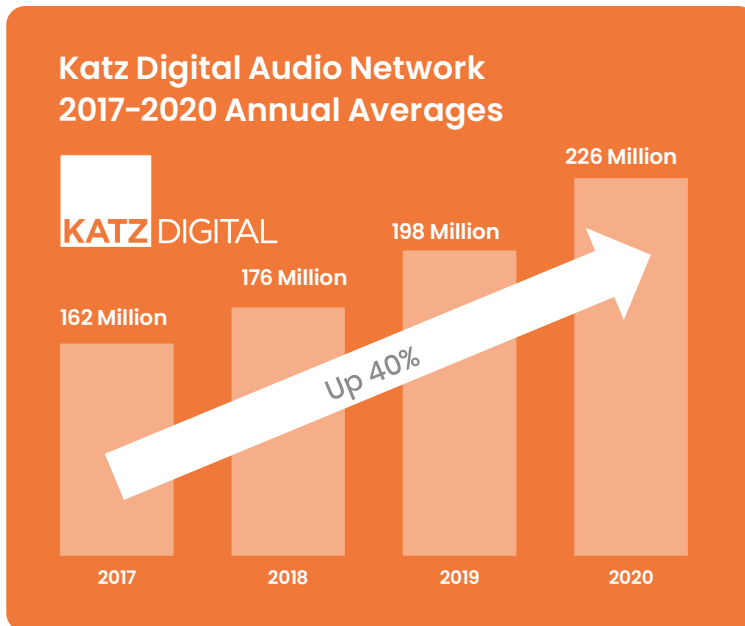
comScore December 2020  
Monthly Unique Users



# Growth & Audio Dominance

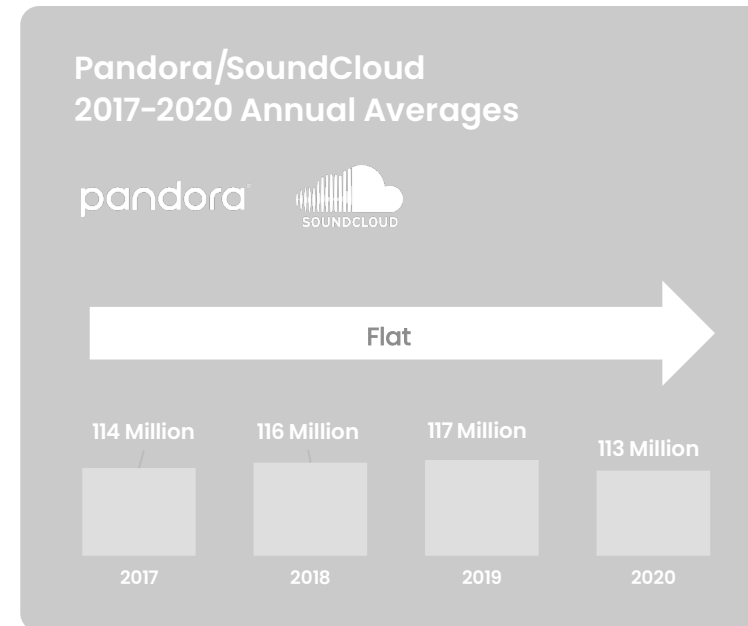
## Katz Digital

- New partners
- The Leading Pureplay
- Organic audience growth
- Radio shifts to new devices



## Pandora/SoundCloud

- Total stagnation
- No gains whatsoever
- Pandora ended 2020 with a seven-year low



ComScore monthly unique visitors. Total persons, One-year averages, rounded. Katz Digital Audio Network is the Katz Digital Broadcast Streams plus Spotify deduped. Pandora/SoundCloud has also been deduped using comScore duplication metrics.

# Heard on All Platforms

15

## Video/Entertainment



## Smart Home



Google HOME

SONOS

## Automotive



Apple CarPlay



androidauto



Google Maps

## Podcasts



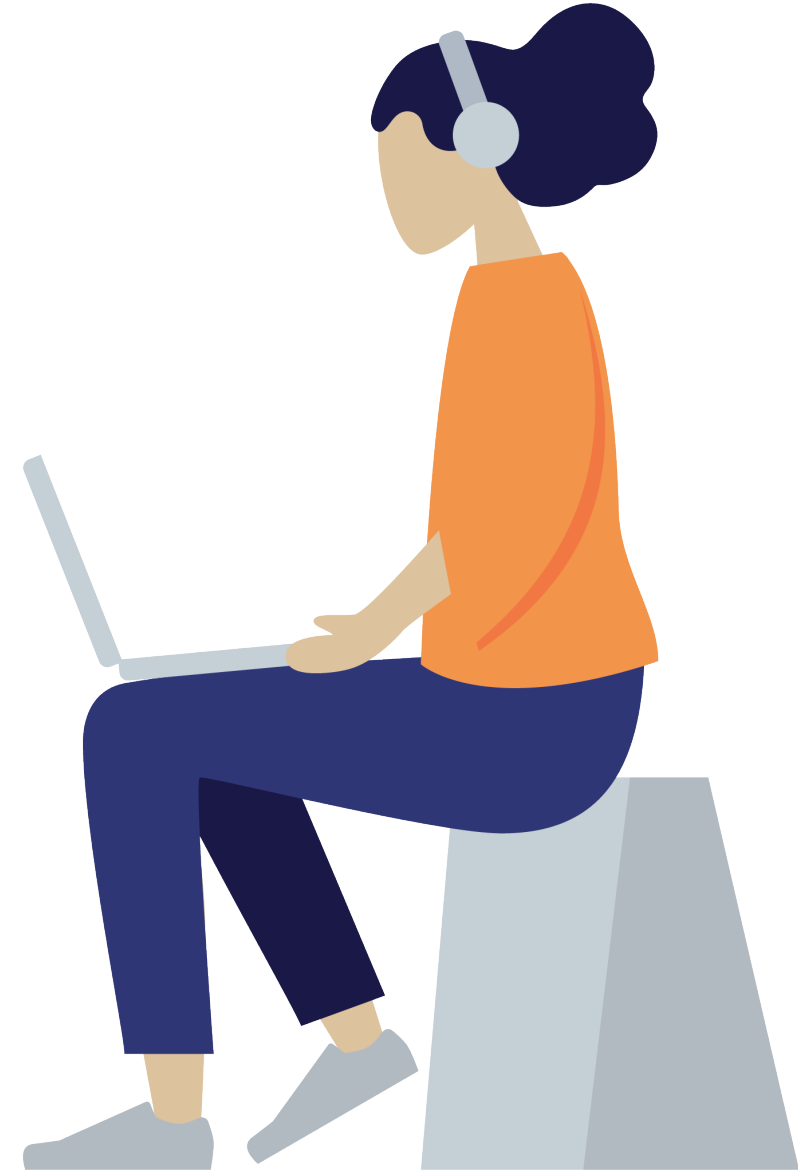
## Audio Gateways



# Smart Technology Drives Performance

## Advanced Audience First Targeting

- 1<sup>st</sup> & 3<sup>rd</sup> party targeting
- Demographic: age, gender, ethnicity
- Verticals, Location, Behavior, Genre, Language
- Integration of advertiser data
- Device Targeting





# Our Audience Works

Campaign success through measured attribution

- Foot traffic measurement
- Brand: Awareness, Affinity, Loyalty & Lift
- Drive to site
- Drive to take action
- Sales conversions



# We Work for our Advertisers!

Some recent examples of our success



## High End D2C company

Drive-to-site measured:  
9:1 ROAS and  
\$½ million in purchases



## Top 5 Bank

Delivered large increase to Brand Lift.




## Major Supermarket Chain

Drove 700,000 new store visits and \$29M in revenue



## Top QSR

Generated \$72 Million Revenue from foot traffic



## Home Improvement/hardware Retailer

Generated ½ million visits and a 125:1 ROAS

## **Katz: the exclusive sales partner for Spotify, the world's largest streaming audio service**

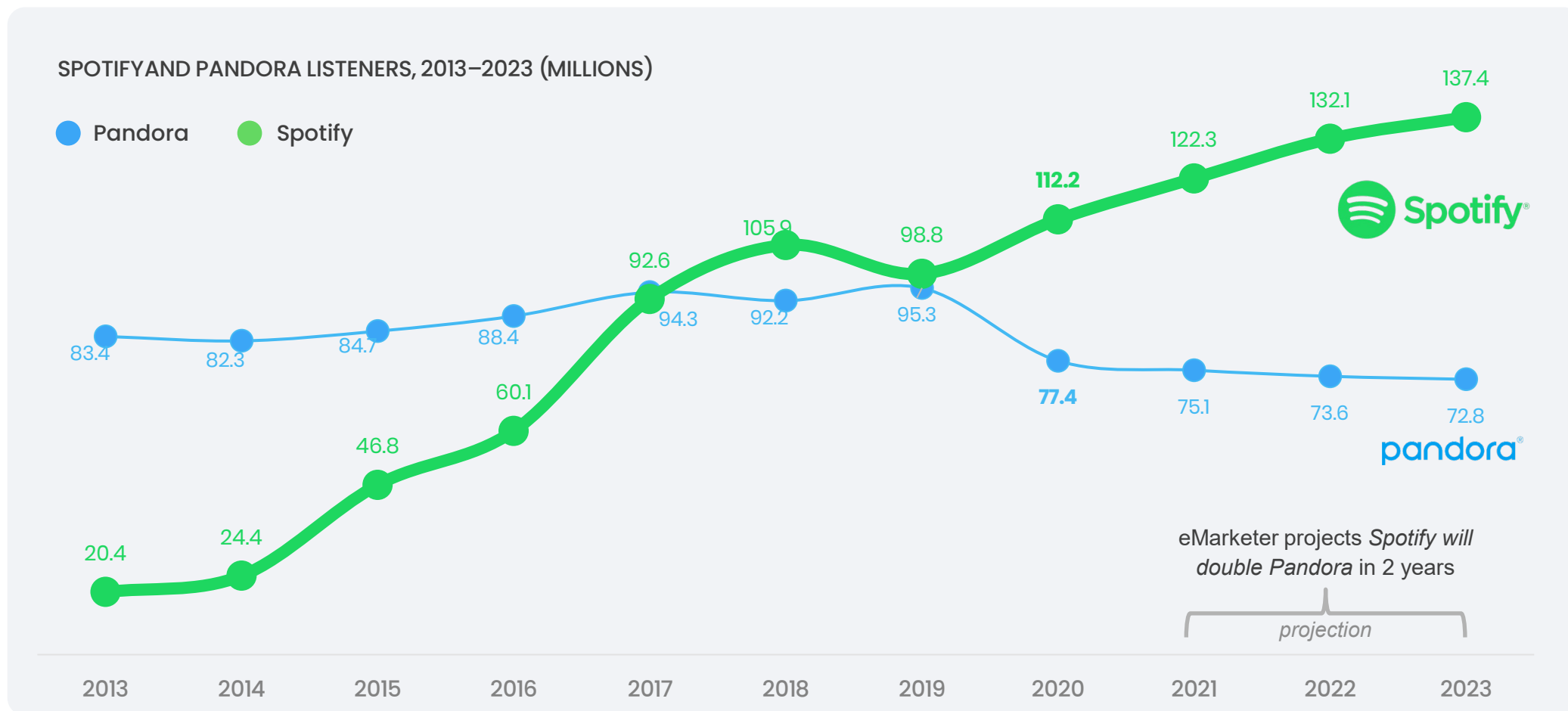
- The fastest growing audio platform
- Grew over 500% in 10 years
- #1 mobile app
- #1 global audio service
- #1 US audio service

92 Countries

320 Million Global Users

112 Million U.S. Users

# Spotify continues to accelerate and overtook Pandora last year



comScore monthly unique visitors (2013–2020) with eMarketer forecast applied for 2021–2023 in millions.  
(December of each year in comparison)

# Spotify has become the Audio Leader

## Streaming Leadership

Overtaking Pandora last year, projected to double by 2023.

## Podcasting Leadership

Grew to the leading podcasting platform in only two years.

## Targeting technology

Sophisticated technology to target the right user.

## User Engagement

Lean-forward users have control over the world's largest music library.