MMA SM2 INNOVATION SUMMIT

DISRUPT. TRANSFORM. GO MOBILE.

#SM2Innovation
@MMAGlobal

MMA
MOBILE MARKETING ASSOCIATION

MMA SM2 INNOVATION SUMMIT



Next Big Disrupter: Gen Z

HEIDI BROWNING

SVP, Strategic Solutions

Pandora

In Partnership With:

PANDORA®

#SM2Innovation
@MMAGlobal

DISRUPT. TRANSFORM. GO MOBILE.


PANDORA
MUSIC MOVES WITH GEN Z
@HEIDI_GOLIGHTLY



Pandora Confidential

PANDORA



Pandora Confidential

PANDORA

7+

HOURS PER DAY

IMMERSED IN THE EARBUD ERA



Source: Pandora Gen Z Market Research, March 2016

Pandora Confidential

PANDORA



TUNING IN WHILE TUNING OUT

EARBUD ESSENTIALS

87%
Listening To Pandora

76%
Watching YouTube

70%
Streaming TV

55%
Other Music

Source: Pandora Gen Z Market Research, March 2016

Pandora Confidential

PANDORA

7

GENRES PER WEEK

BLENDING & BENDING

BRITT NICOLE

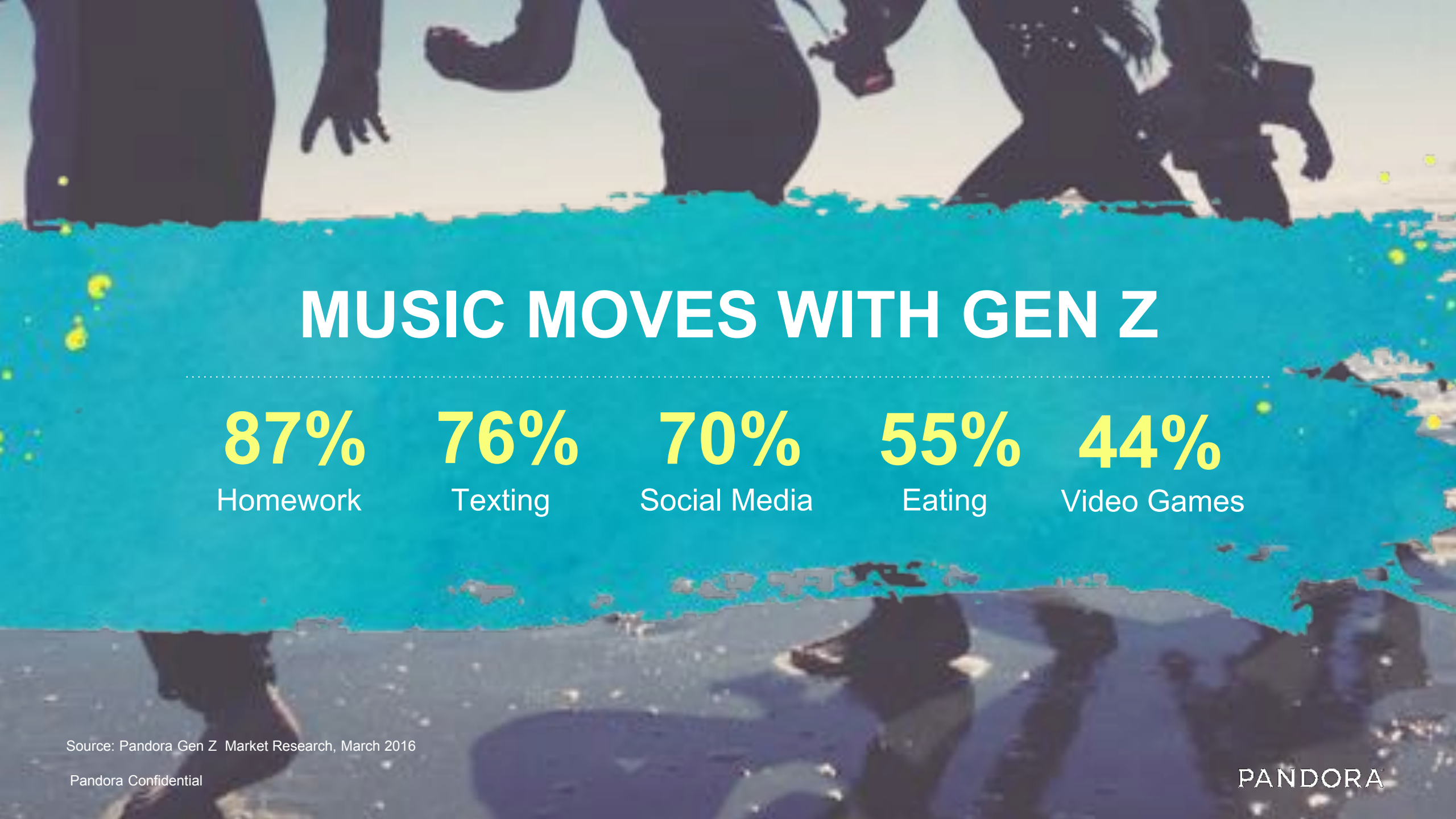
She sings a little bit of everything from rap, hip hop, to gospel.



Source: Pandora Internal Metrics, August 2016,
Pandora Gen Z Market Research, March 2016

Pandora Confidential

PANDORA



Source: Pandora Gen Z Market Research, March 2016

Pandora Confidential

PANDORA


MUSIC IS...
A MOOD ENHANCER
AN IDENTITY SHAPER
A HUMAN CONNECTOR

PANDORA

MUSIC IS WHAT FEELINGS SOUND LIKE.

TUMBLR POST

Pandora Confidential

CHICKEN SOUP FOR THE GEN Z SOUL

MUSIC ENHANCES MOOD

97%
Makes me happy

91%
Helps me forget stress & problems

86%
Makes me more creative

81%
Builds my confidence

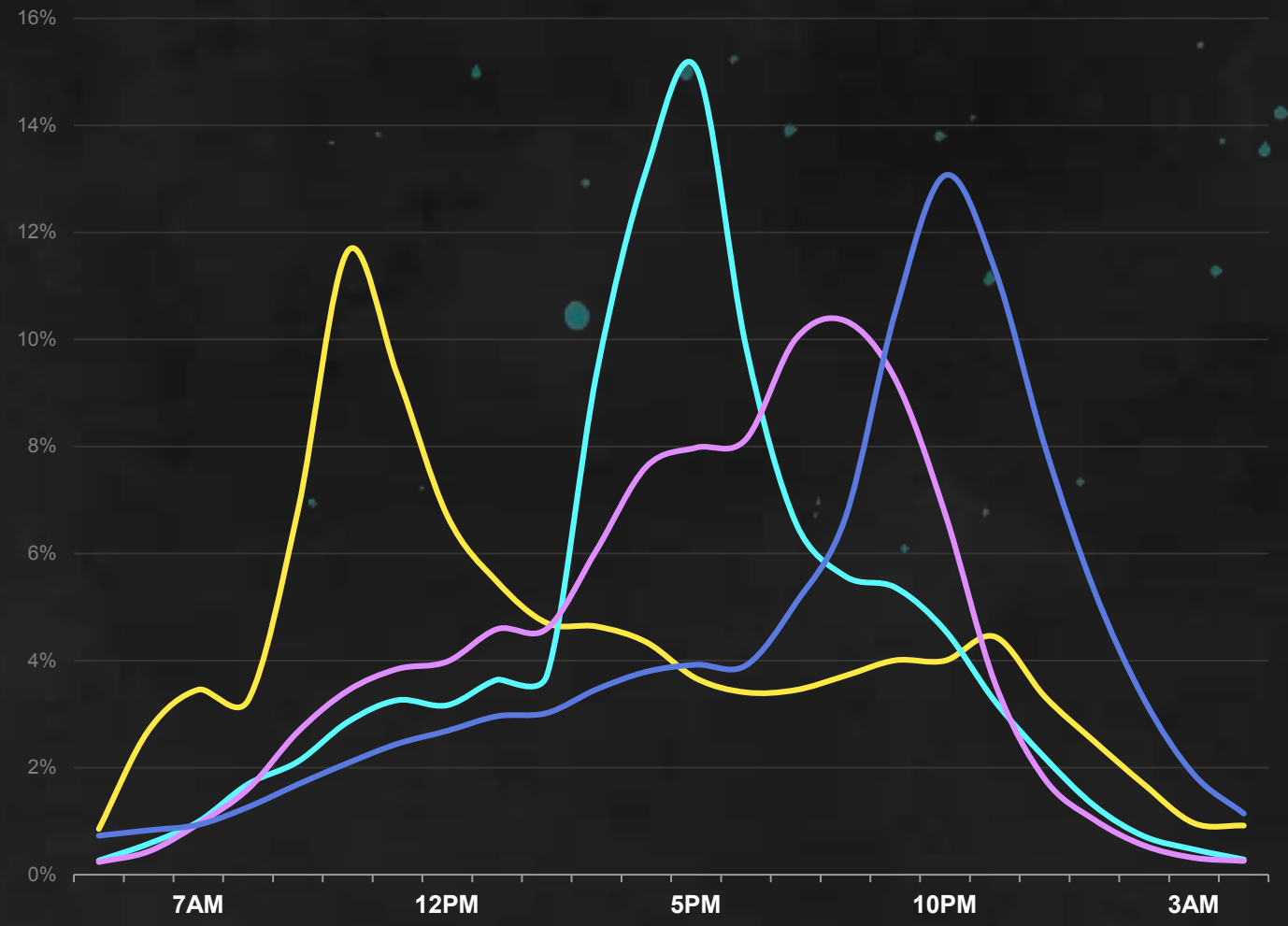
Source: Pandora Gen Z Market Research, March 2016, Top 2 Box Music Statements

Pandora Confidential



MUSIC MOODBOARD

- Morning Hip Hop: Rise & Grind
- Happiest Tunes On Earth
- Beats for Studying
- Relaxation



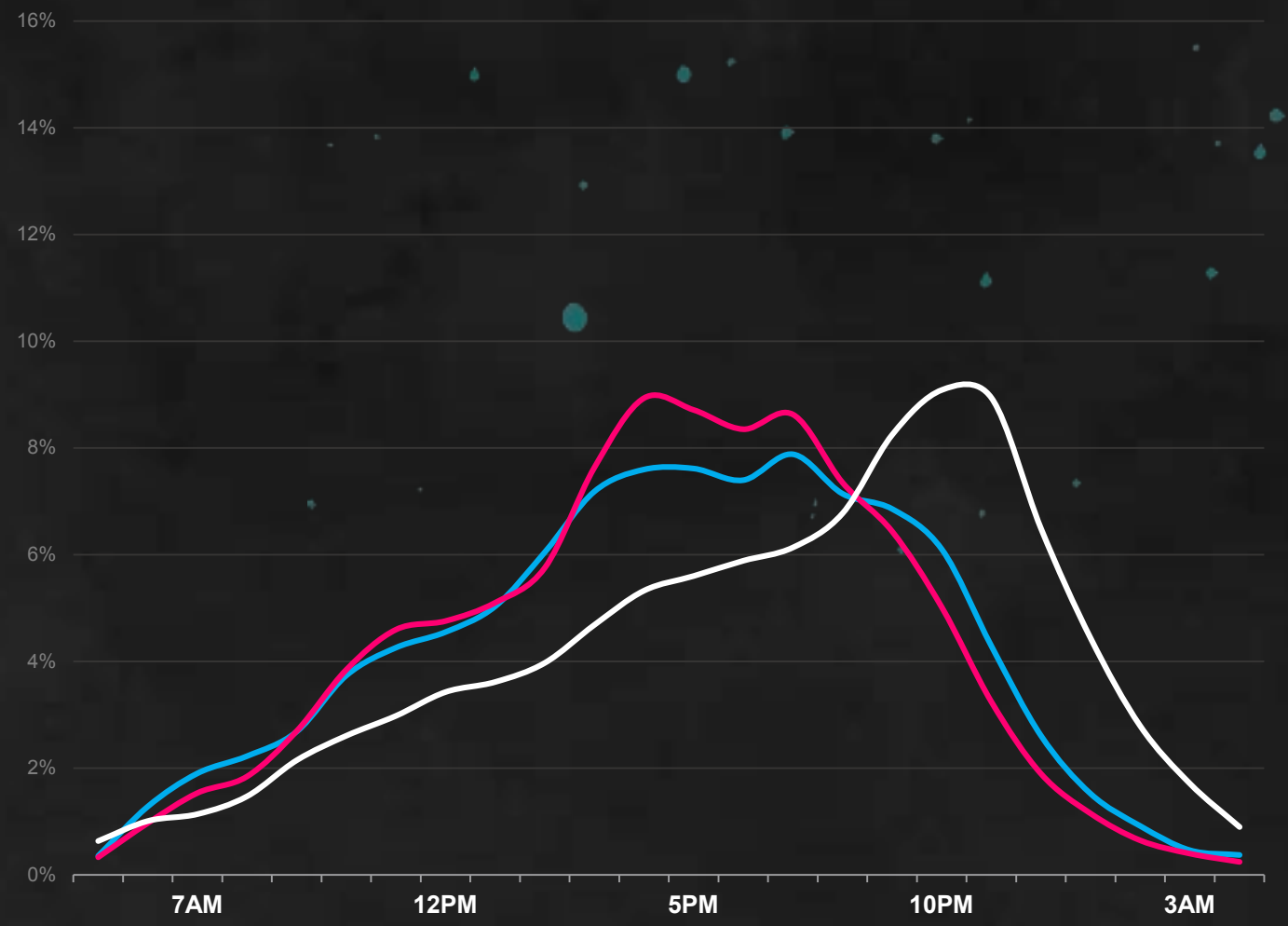
Source: Pandora Internal Listener Genre Data, September 2016, T13-17

Pandora Confidential

PANDORA

MUSIC MOODBOARD

- Rap Strength Training (Boys)
- Pop Fitness (Girls)
- Break-Up Songs (Teens)



Source: Pandora Internal Listener Genre Data, September 2016, T13-17

Pandora Confidential

PANDORA

MY MUSIC WILL TELL YOU MORE ABOUT ME THAN I EVER WILL.

TUMBLR POST

NEW MUSIC SUPERHEROES

GEN Z RALLIES AROUND ARTISTS WITH A MORE HUMAN SIDE

DEMI LOVATO

> She is beautiful, smart, confident and does her own thing. I admire her SO much.



Source: Pandora Gen Z Market Research, March 2016

PANDORA

ALL WE NEEDED WERE SOME GOOD FRIENDS & A SONG TO SING ALONG.

TUMBLR POST



CONNECTING WITH MUSIC, CONNECTING WITH EACH OTHER

63%
HELPS ME FEEL CLOSER TO FRIENDS & FAMILY

73%
LISTEN WITH FRIENDS

55%
LISTEN WITH SIBLINGS

44%
LISTEN WITH A PARENT

Source: Pandora Gen Z Market Research, March 2016



ADELE



MAROON 5



PITBULL



NICKELBACK

MUSIC CONNECTS GENERATIONS

TOP ARTISTS AMONG GENERATIONS X & Z

PARENTS & THEIR TEENAGE KIDS

Source: Pandora Internal Listener Data, September 2016, top artists for both Gen X and Gen Z

PANDORA


MUSIC IS...
A MOOD ENHANCER
AN IDENTITY SHAPER
A HUMAN CONNECTOR

PANDORA


THE POWER OF
PERSONALIZATION

#PANDORA
#YOUGETME

THUMBPRINT RADIO



PANDORA



MAKE IT A MOMENT

#THUMBMOMENTS
WITH NICK JONAS

PANDORA

MUSIC MOVES WITH TEENS

HOW TO WIN GEN Z'S TIME AND CONSIDERATION

ATTENTION

Show Me
You Know Me

+

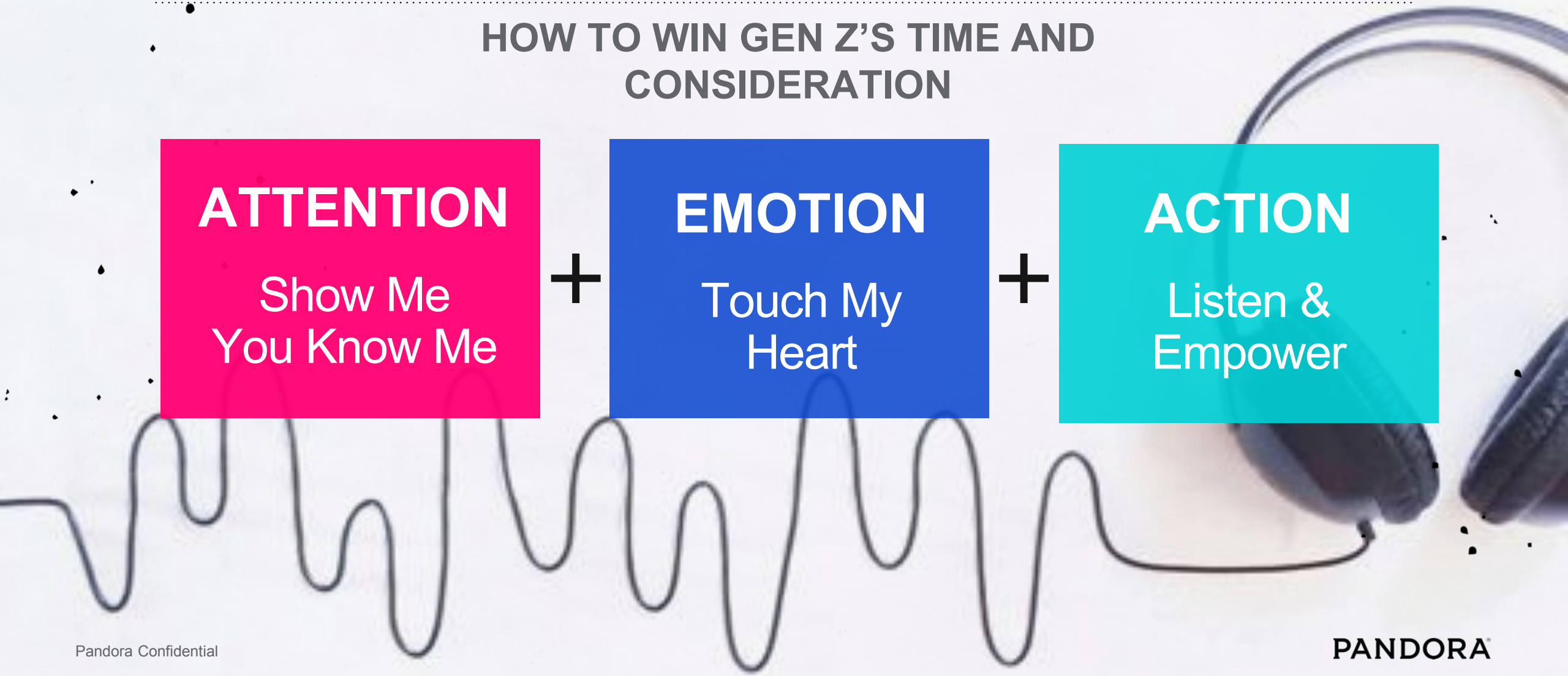
EMOTION

Touch My
Heart

+

ACTION

Listen &
Empower



Pandora Confidential

PANDORA



Pandora Confidential

PANDORA