PANDORA®

Why the Next Song Matters

SIMON FLEMING-WOOD
CHIEF MARKETING OFFICER



THIS IS A STORY ABOUT THE POWER OF MUSIC




PANDORA




NO. SLO

The Music Genome Project

Expertise, commitment, hard work

95 musicologists

Up to 400 attributes per song

15 years

Millions of tracks analyzed

55+ billion thumbs

8+ billion stations

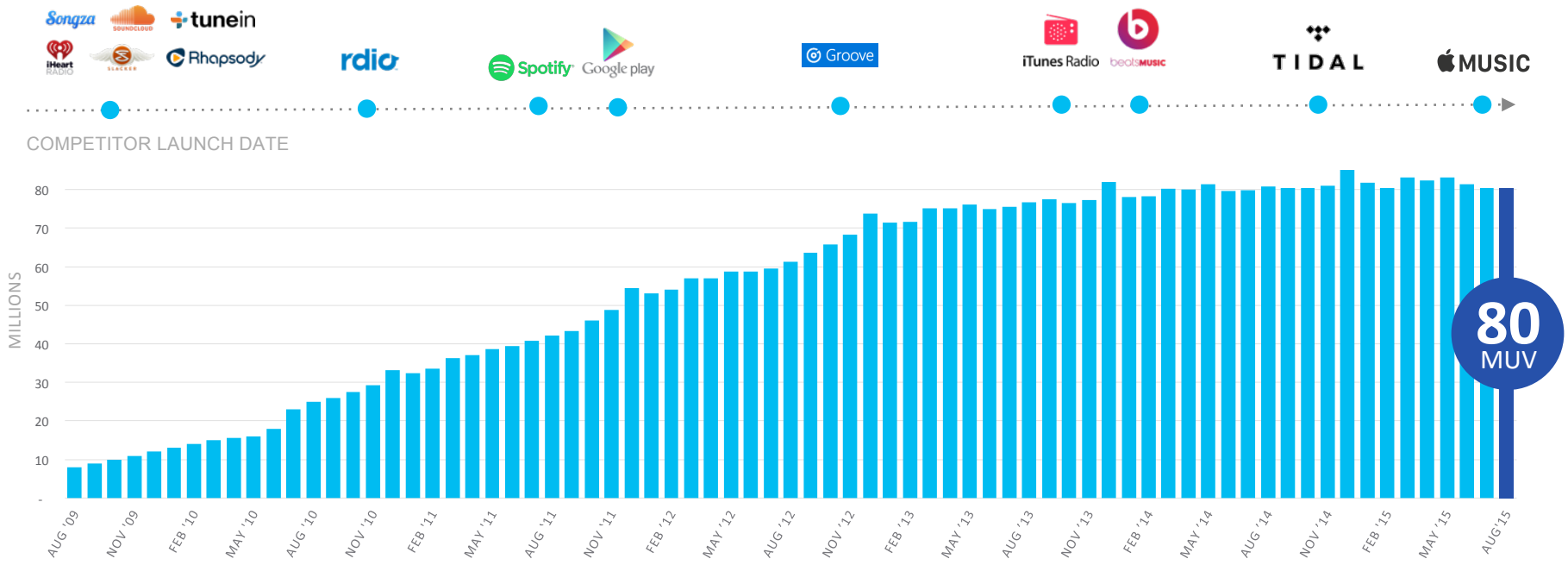


Pandora Confidential

Pandora believes: music is a deeply and profoundly human and personal experience.



Pandora Audience Growth / The Marketing Challenge



Source: Pandora Internal Metrics, May 2015

Leading Engagement

TIME SPENT



Source: ComScore, Pandora (US, December 2014)


NOW PLAYING. YOU.
Rickenbacker
PANDORA

Now Playing. You.



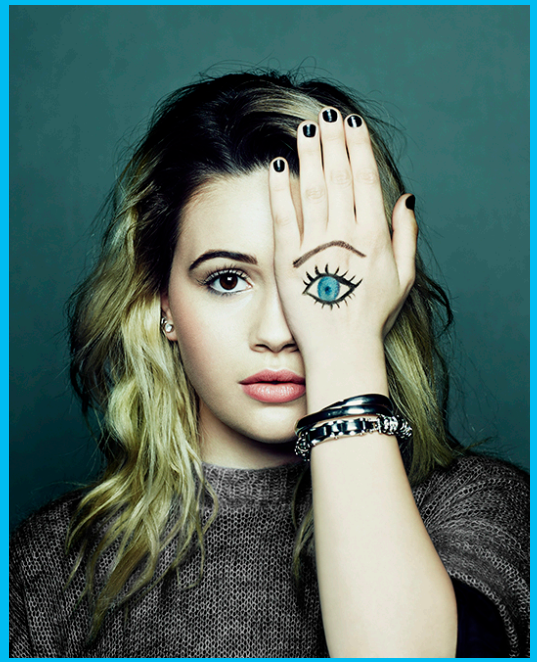
Pandora Thumb Moments







Pandora Thumb Moments





The Challenge Today. . .




HUMANS ARE
UNDERRATED

We're only now beginning to feel the true costs of how technology makes our relationships more plentiful but far shallower.

Jonathan Sapiro, Positive Psychologist, former CSO Double Click

People are connected to a point of disgusting proportions. But I've never felt more alone.

Millennial Respondent



Technology Can Be De-Humanizing



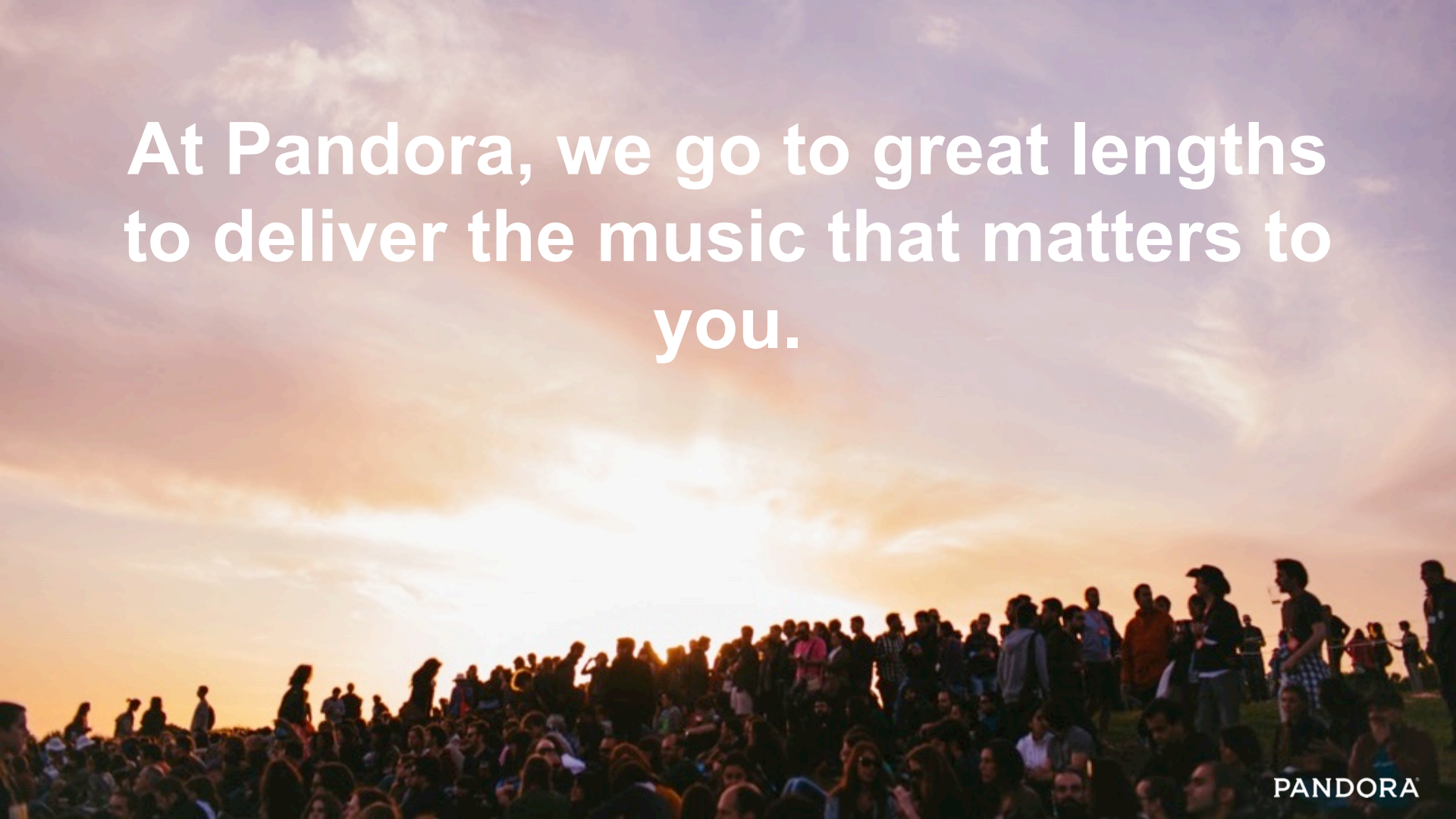
61%

of generation Z says technology makes us less human.

Intel Study 2013



THE NEXT SONG MATTERS


At Pandora, we go to great lengths to deliver the music that matters to you.
PANDORA




AUDIO
PANDORA

Musicologists

SHOWCASING OUR PEOPLE



PANDORA

Changing Perceptions

11.8%

Brand favorability
up 11.8%
(vs. 3% industry norm)

16.2%

Consideration
up 16.2%
(vs. 1.6% industry norm)



Source: Millward Brown

PANDORA®

Q + A