

Pandora Case Study



We see every day how the media landscape is evolving. Take Pandora, streaming music titan, for example. Stepping onto the scene in 2000, they now boast more than 84 million monthly unique visitors enjoying 1.8 billion of monthly hours of streamed free and customizable music.

AUDIENCE PLAY-NATIONAL

THE PASSION POINT OF MUSIC
DRIVES SCALE & ENGAGEMENT

84M

Monthly Unique Visitors*

1.1B

Monthly Thumb Interactions**

1.8B

Monthly Hours Streamed**

Internal metrics, September 2016



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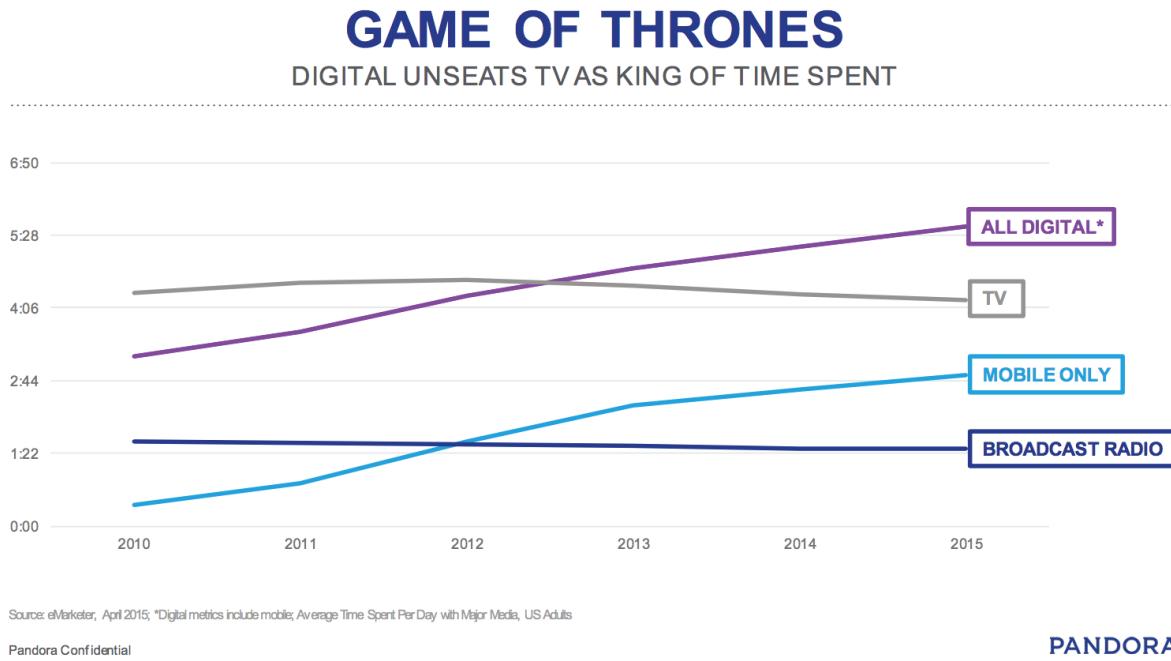


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Digital in general has overtaken TV in the time spent with media. As the move continues to shift to digital and particularly mobile, many are left to question who still tunes into traditional radio these days?



Traditional or “terrestrial” broadcast stations decide what you will hear based on their format and music playlist. Pandora differs by allowing the user to build their own format and have multiple playlists and stream these on a device of their choice – desktop at work, mobile on the go, etc.

Internet radio has a generally younger audience of core listeners that like to customize their music and playlists, hitting primarily adults 18-34 and 18-49, while older demographics still gravitate to traditional radio.

There is still an audience with traditional, but the key factor business owners need to consider is targeting. While advertising dollars designated to traditional radio can reach certain very basic demographics based on station format, it's a broad scope approach. By tightening your focus and dedicating dollars to Pandora, you can target way beyond, focusing on key segments in markets, as well as reaching a much younger audience.

Ad playtime is also important to consider. Traditional radio stations can play anywhere from 9-18 minutes of ads per hour! TV packs in 13-17 minutes of ads per hour. With Pandora, there is more music and less interruptions (just under 4 minutes of ads per hour) so that brands stand out and are not lost in a sea of messages.



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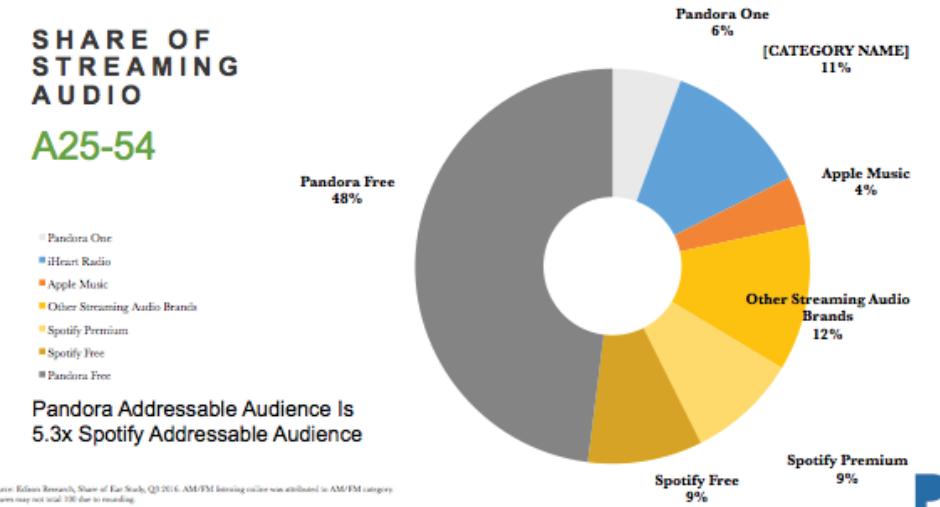
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* Source: *Nielsen via AdWeek, June 2013. Arbitron, Media Monitors and Coleman Insights: What Happens When The Spots Come On, 2011 Edition.

How does Pandora stack up to their competition? As you can see in the graph below, the most popular service is Pandora Free at 48%. Spotify free and premium fall in second place.



With the considerable growth in Internet radio, traditional is doing what they can to compete in this space. They are often offering digital banner value added ads on their radio sites, but are struggling against the streaming giants.

Their competition is fierce - you can stream one station as you drive your children to school (Radio Disney), switch gears at work to your favorite Pandora station, then again when you go the gym and need an inspiring mix to get through the workout. Traditional stations simply can't compete.

It's no surprise that Pandora is leading in the mobile space in terms of time spent on the platform, beating even Facebook!



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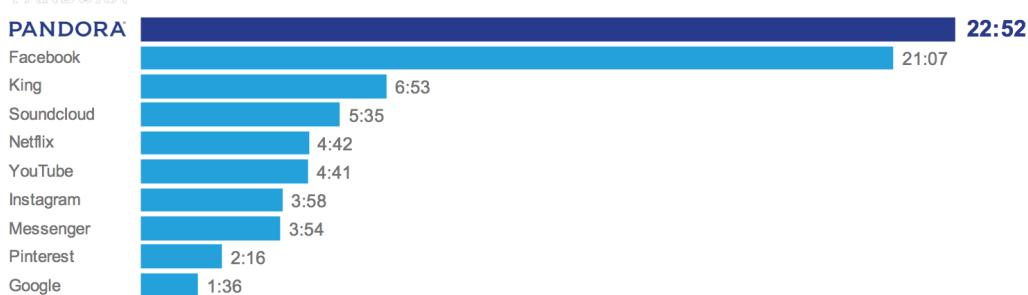
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PANDORA IS #1 IN MOBILE TIME SPENT

TIME SPENT DRIVES BRAND ENGAGEMENT

Avg. Hours Spent Per User Per Month

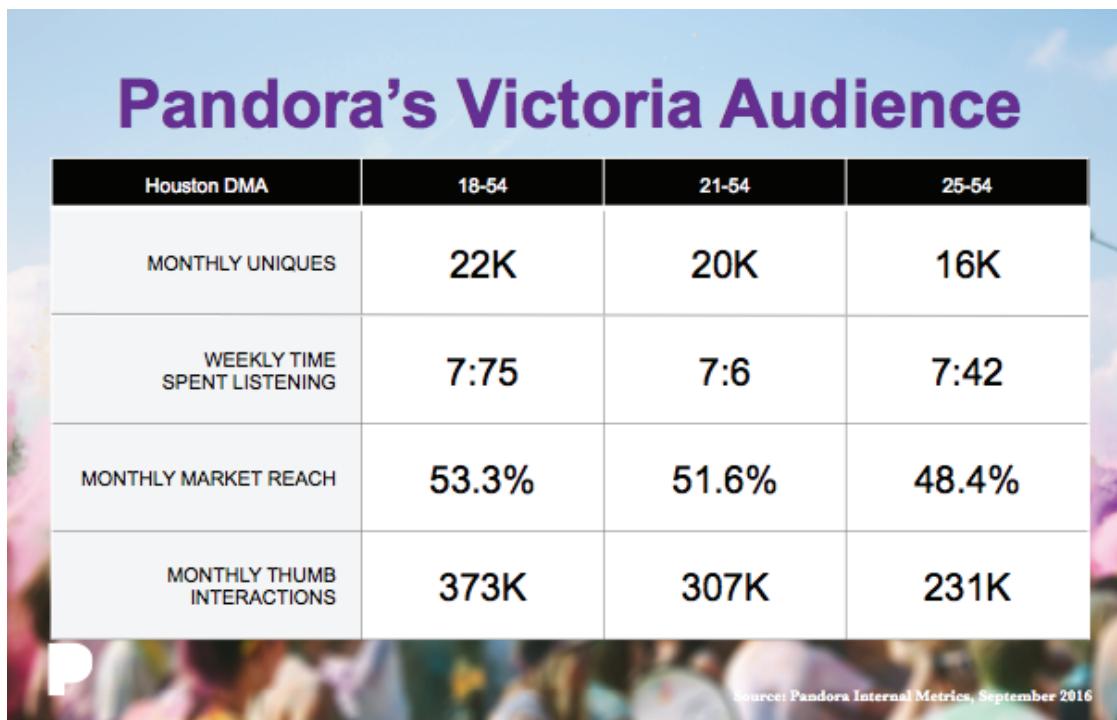


Source: comScore Media Metrix, July 2015 (mobile & tablet). comScore Mobile Metrix domain ranking reflects combined mobile web and app traffic reported for all mobile domains.

Pandora Confidential

PANDORA

The numbers clearly show Pandora's growing reach in our local markets. Below you will see the numbers for Victoria, TX, Corpus Christi, TX and Longview, TX – some of the core markets that Advocate Digital Media covers. The numbers are impressive! To learn more about Pandora and other digital advertising platforms, contact Advocate Digital Media at www.advocatedigital.com or call 855-322-3355.



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Pandora's Corpus Christi Audience

Corpus Christi DMA	18-54	21-54	25-54
MONTHLY UNIQUES	132K	117K	96K
WEEKLY TIME SPENT LISTENING	7:69	7:59	7:46
MONTHLY MARKET REACH	45.3%	44.3%	42.2%
MONTHLY THUMB INTERACTIONS	2.1M	1.7M	1.3M

Source: Pandora Internal Metrics, September 2016

Pandora's East Texas Audience

Longview/Tyler DMA	18-54	21-54	25-54
MONTHLY UNIQUES	144K	127K	103K
WEEKLY TIME SPENT LISTENING	7:09	7:01	6:91
MONTHLY MARKET REACH	40.5%	39.6%	37.4%
MONTHLY THUMB INTERACTIONS	1.9M	1.6M	1.2M

Source: Pandora Internal Metrics, September 2016



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