



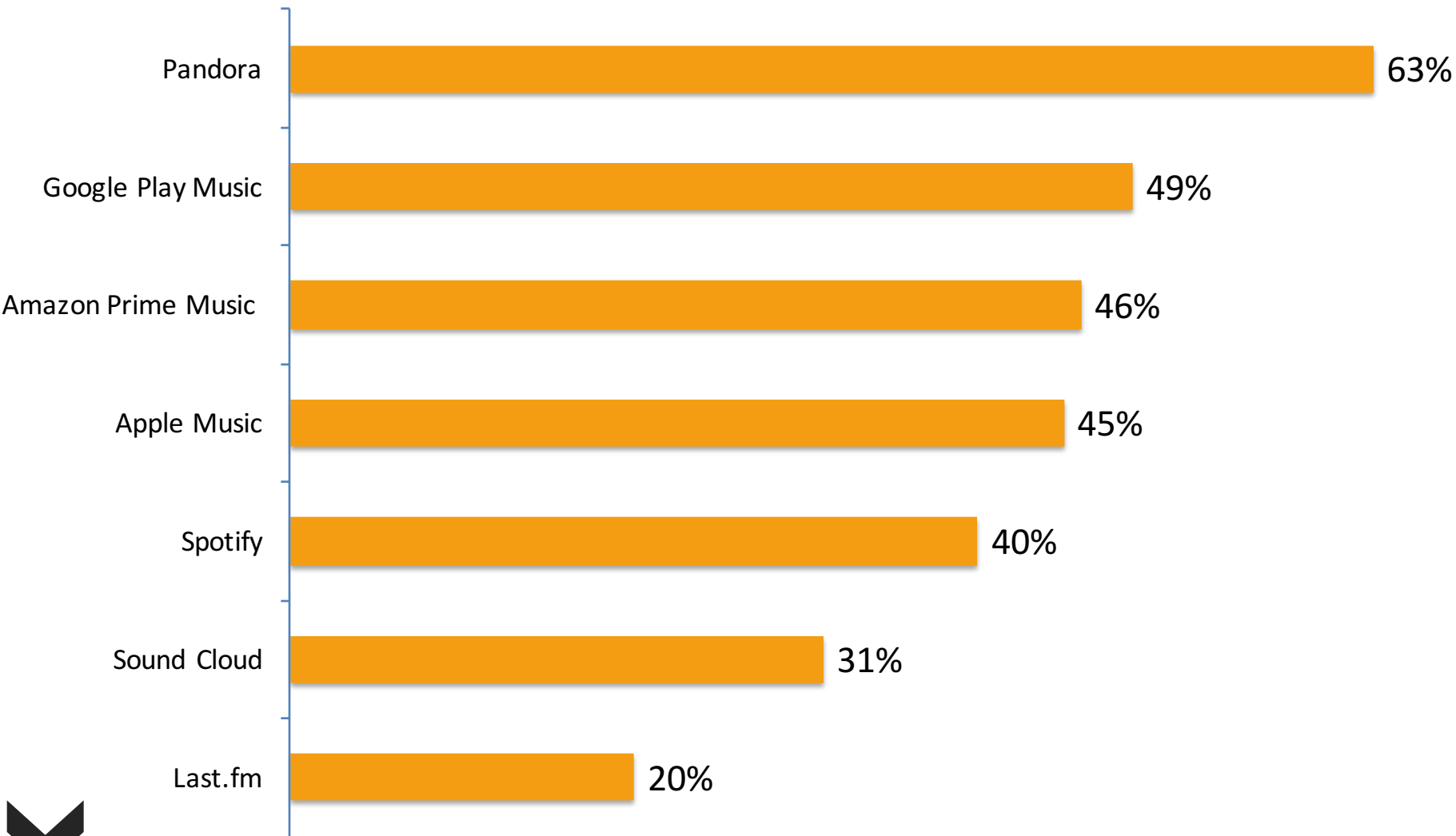
MORNING CONSULT

PANDORA NATIONAL POLL: 10.28.15



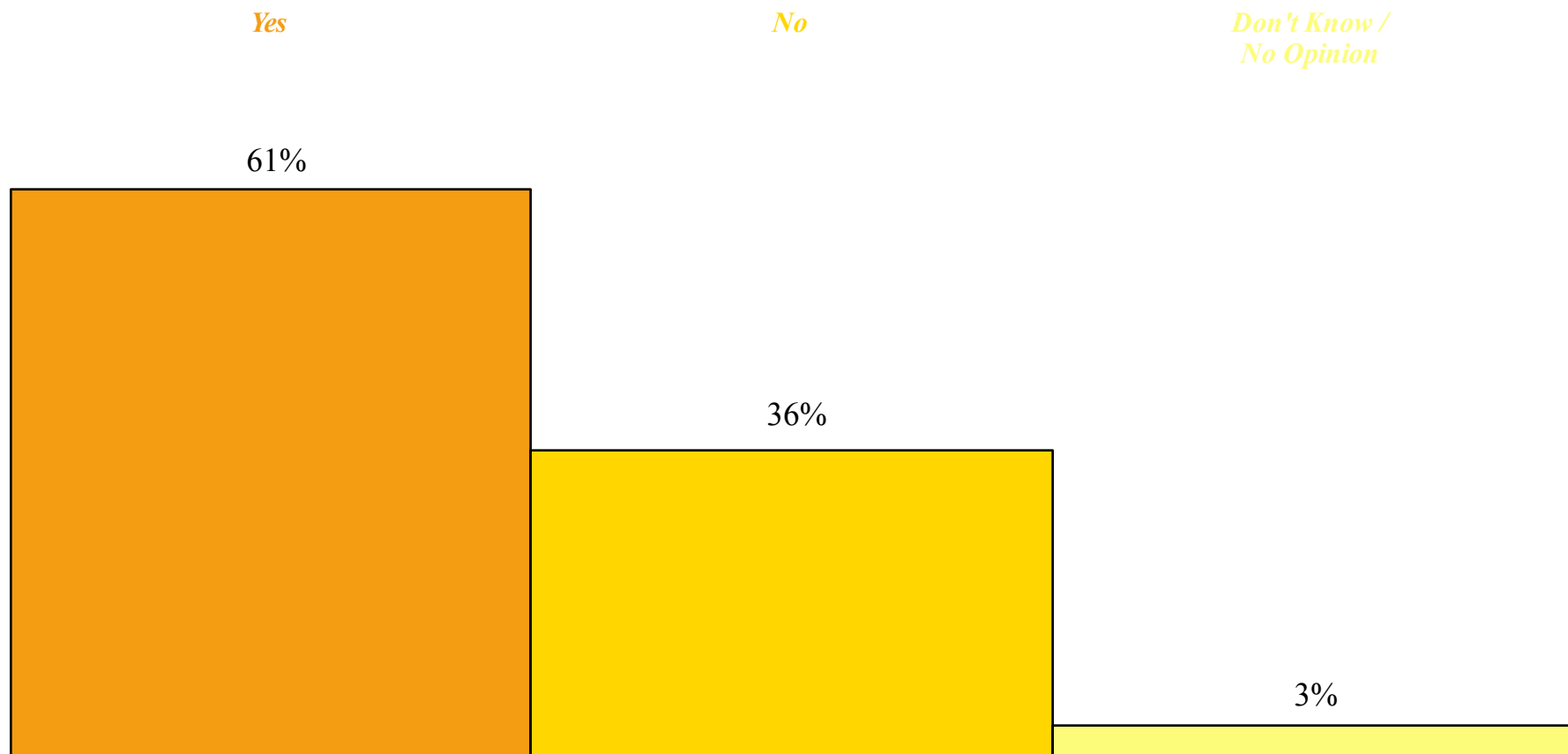
Please indicate if you have a favorable or unfavorable opinion of each of the following.

Total Favorable



More than half of voters (61%) have used an online music streaming service

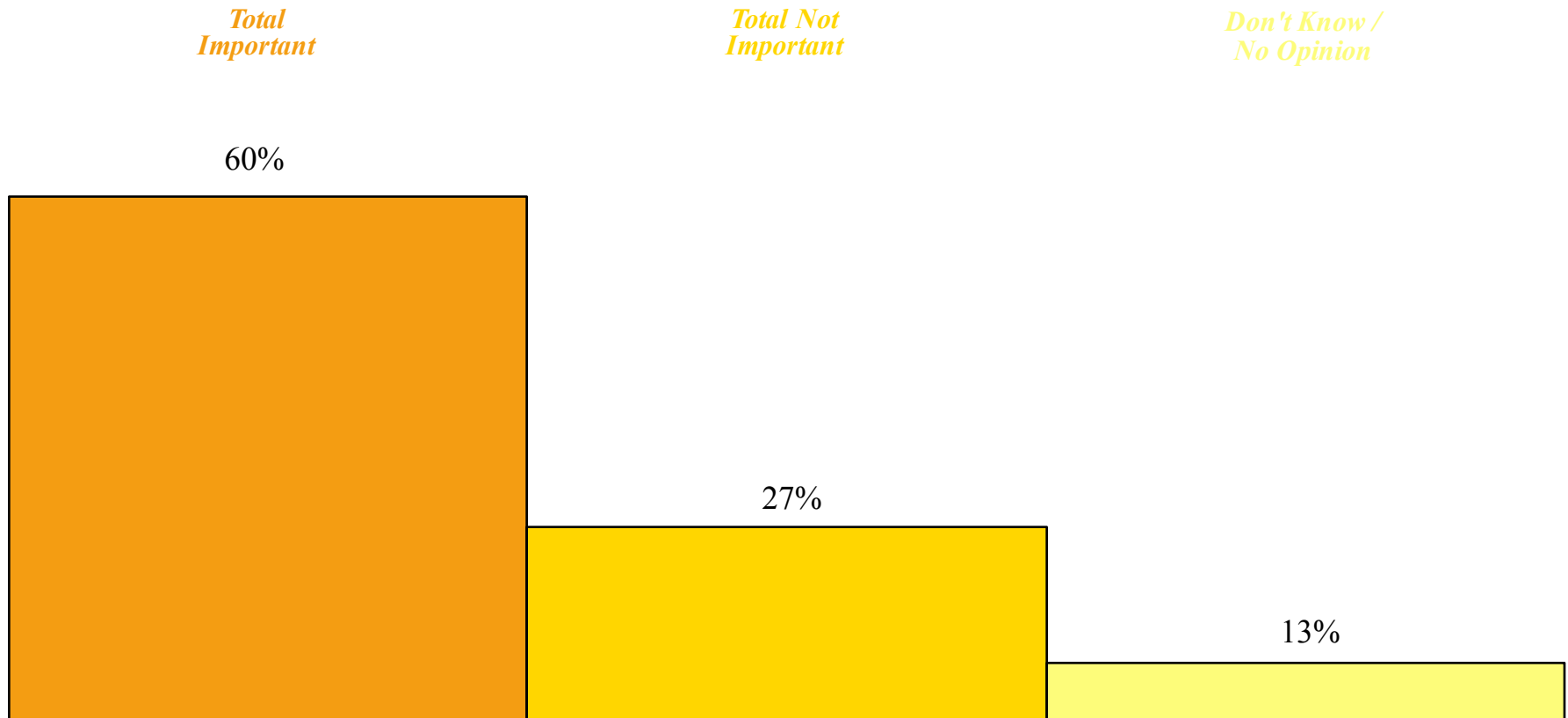
Have you ever used an online music streaming service such as Pandora, Spotify or Apple Music?



Six in 10 voters (60%) say free-to-the-listener streaming is important to them

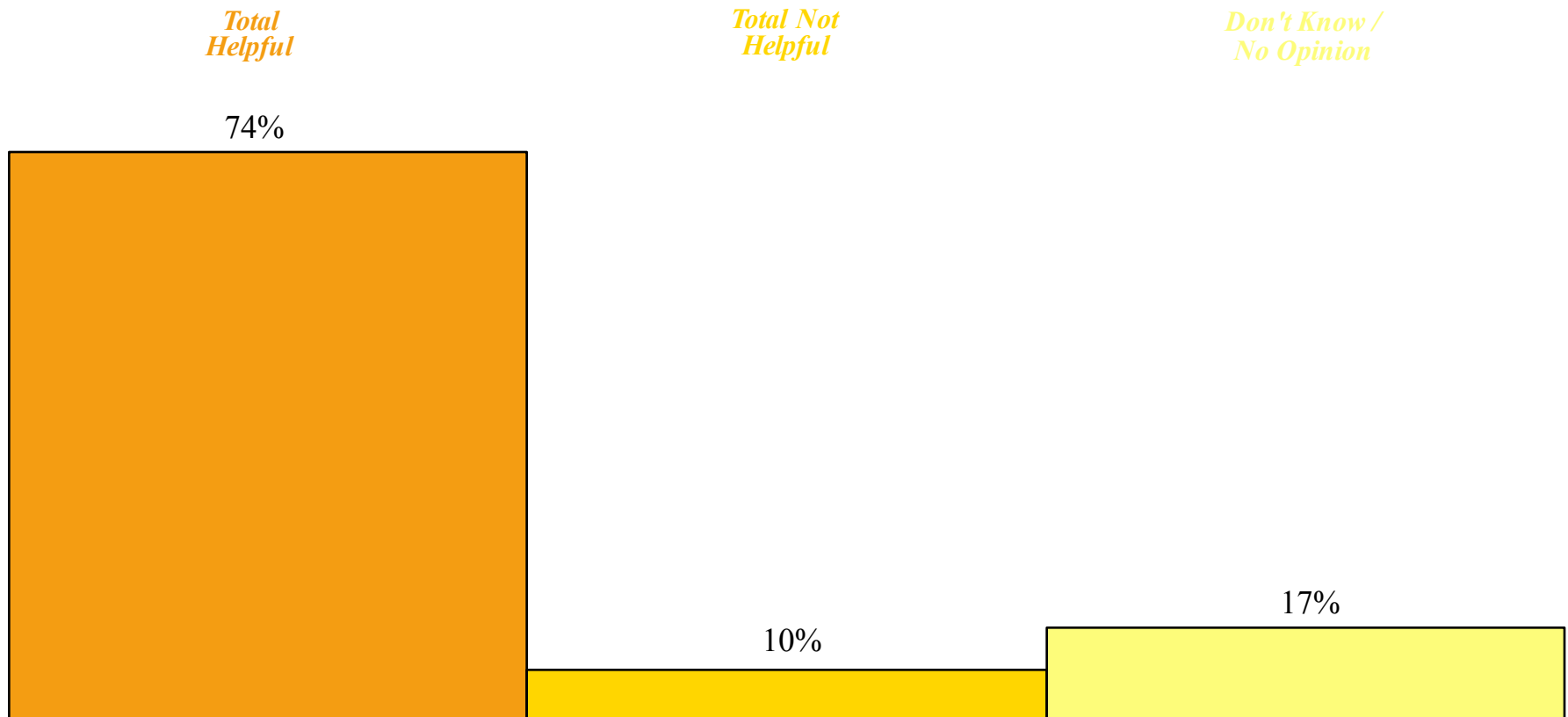
As you may know, some online music streaming services do not charge listeners to stream music. Instead, legal “free-to-the-listener” services will occasionally play an advertisement.

How important are “free-to-the-listener” online music streaming services to you?



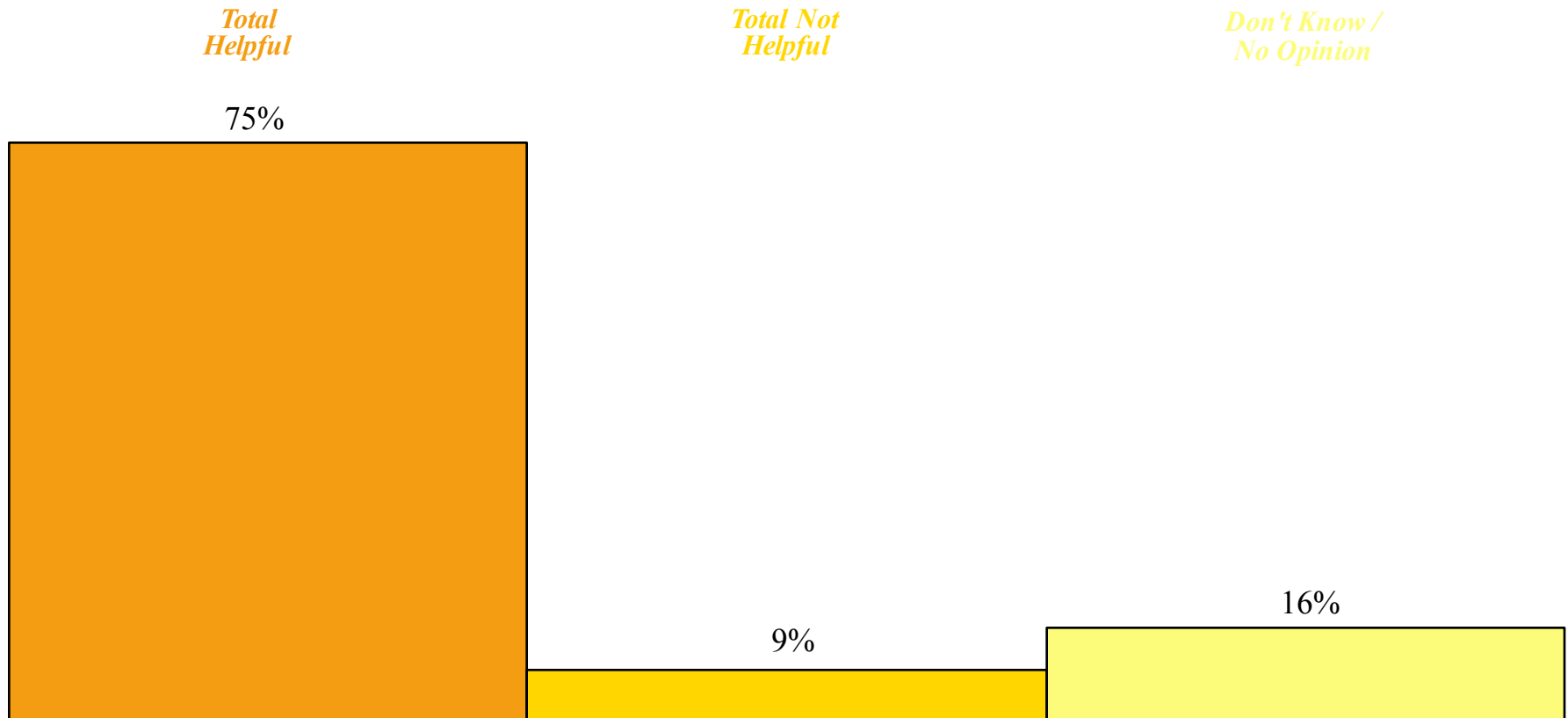
Seven in 10 voters (74%) say free-to-the-listener services are helpful for listeners to discover new artists and music

How helpful do you think legal, “free-to-the-listener” online music streaming services are for listeners to discover new artists or music they might not have heard otherwise?



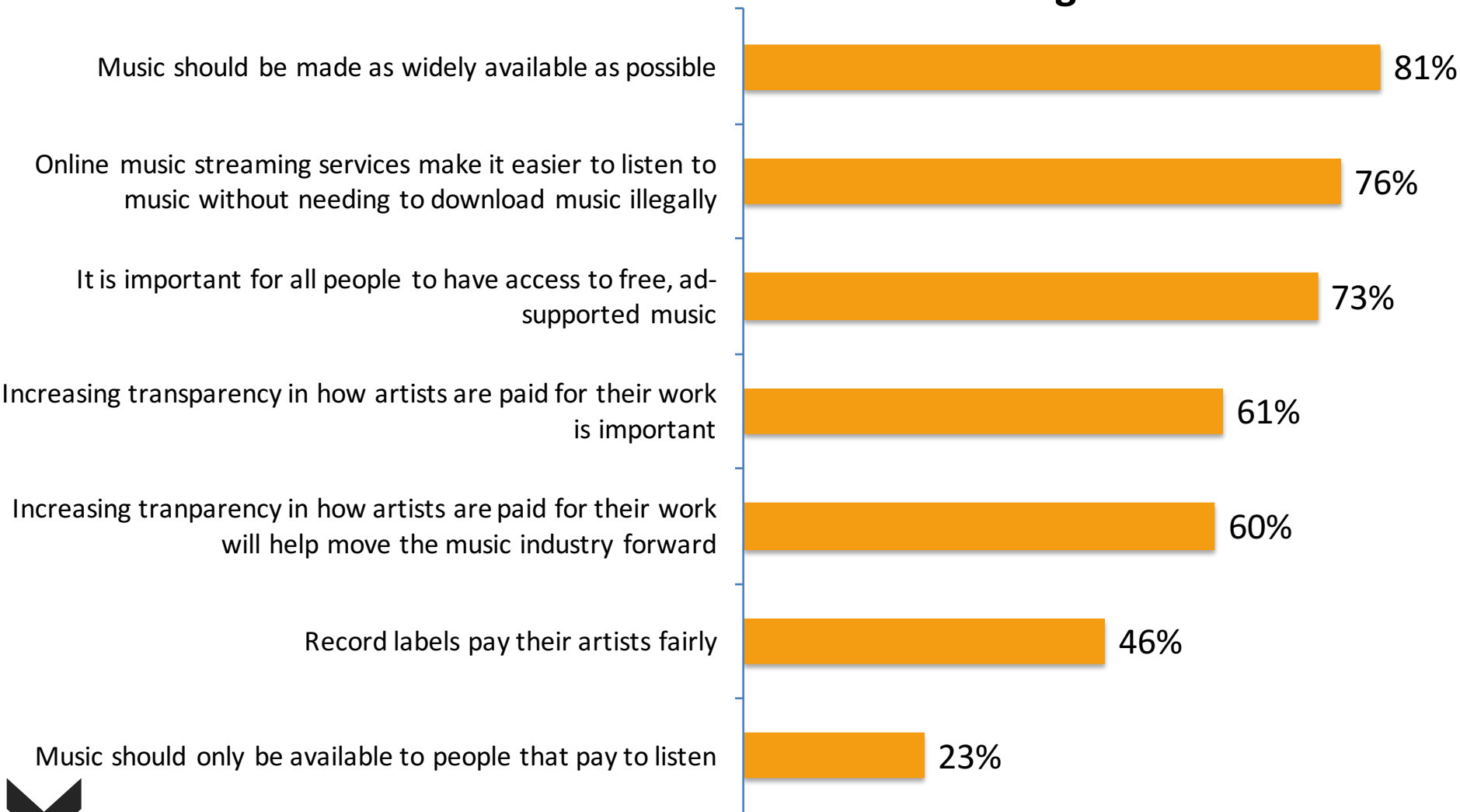
Seven in 10 voters (75%) say free-to-the-listener services are helpful for artists and musicians to reach new listeners

How helpful do you think legal, “free-to-the-listener” online music streaming services are for musicians and artists to reach new listeners that may not have heard their music otherwise?



Please indicate if you agree or disagree with each of the following statements:

Total Agree



Most voters (66%) say they are not likely to pay for a music streaming subscription if free-to-the-listener were no longer offered

If online music streaming services no longer offered “free-to-the-listener” options, how likely is it that you would pay for a subscription?

