

BESPOKE SURVEYS

Audio Volume 22

SPOT, SIRI, AAPL, AMZN

1,250+ US Consumers, Balanced to Census



CHECK BREAKDOWN:

STREAMING MUSIC – ENGAGEMENT

Over time, engagement with streaming platforms has increased, especially during the pandemic, but recent trends have leveled off.

JOE ROGAN FEEBACK / SENTIMENT

There is a small cohort of consumers who say their opinion of Spotify has worsened recently and call out Joe Rogan and “Covid Misinformation” as reasons. However, we would also note that there are consumers at the other end of the poll who have strongly positive opinions about Joe Rogan. In all, consumer sentiment and trust around the Spotify brand is mostly in-line with the long tail of history we have (at this point, a small sequential softening but the aggregate opinion is still net positive and not far off the historical data set).

LISTENING PREFERENCES SHIFTS

Over time, consumers are slowly shifting preferences away from picking a channel or station and toward picking individual songs, interviews, and playlists to listen to.

COMPETITIVE DYNAMICS

Spotify continues to outperform when it comes to user experience, overall content, and content quality (according to respondents).

IN THE CAR DYNAMICS

Data around the share who connect a smartphone to listen to audio in their car continues to track flat after substantial increases a few years ago.

PERCEPTIONS OF SIRI

Consumers continue to view Sirius as a platform to listen to in the car, but the share who typically listen to outside the car jumped in this most recent volume (and has increased considerably over time).

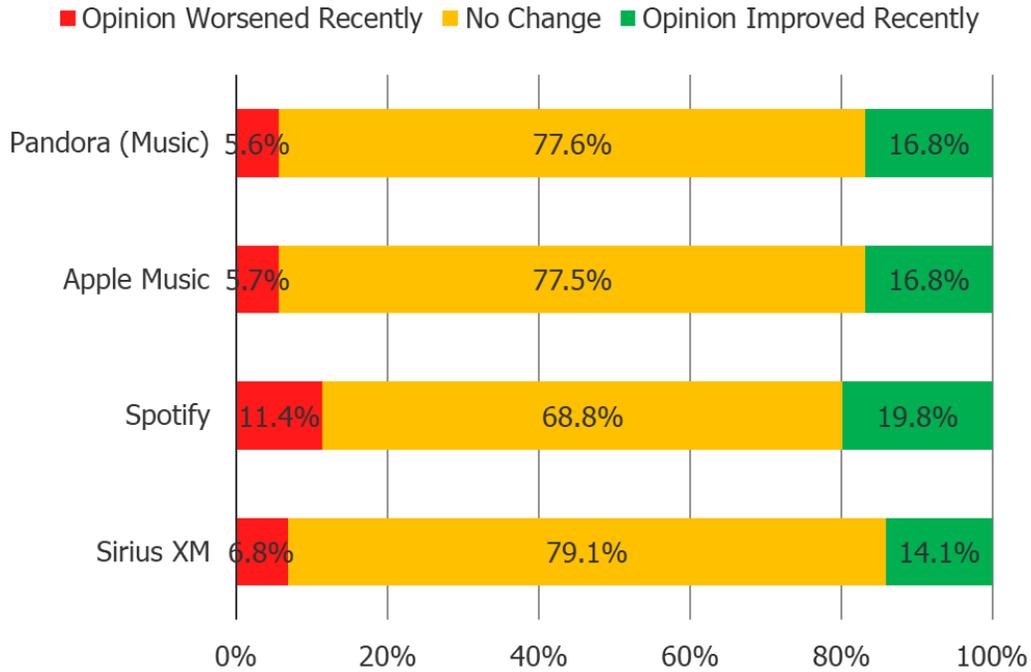
AUDIO DEVICE UPTAKE

Airpods usage has increased and the % of consumers who own devices to listen to audio (portable speakers, headphones, etc) continues to climb. The uptake of these devices is driving increases in how often they listen to music and podcasts, according to respondents.

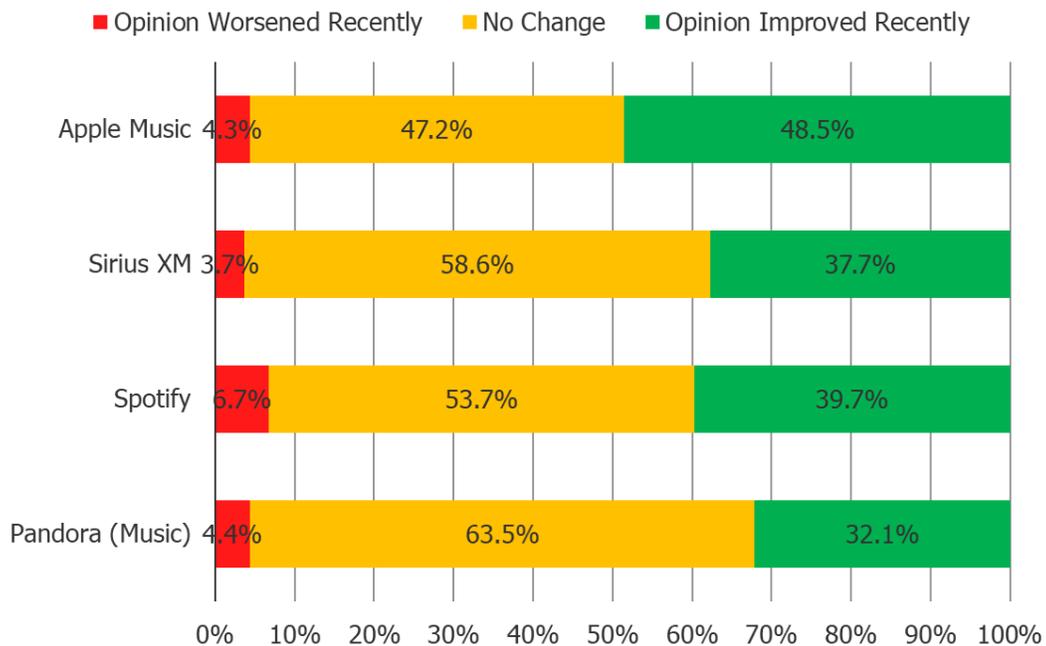
NEW QUESTIONS

HAS YOUR OPINION OF ANY OF THE FOLLOWING CHANGED RECENTLY?

Posed to all respondents.

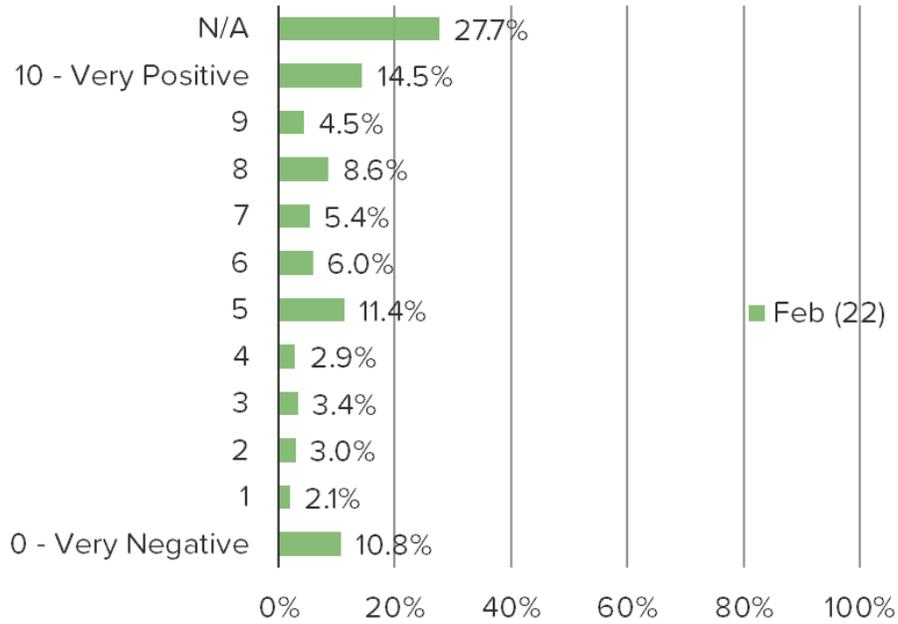


Posed to respondents who have an account with each of the following:

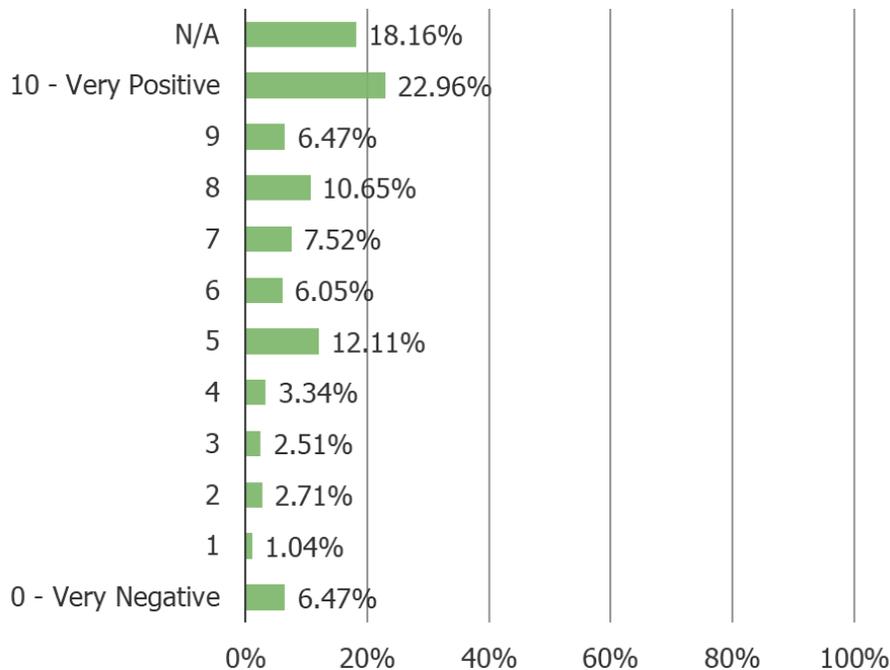


WHAT IS YOUR OPINION OF JOE ROGAN?

Posed to all respondents.



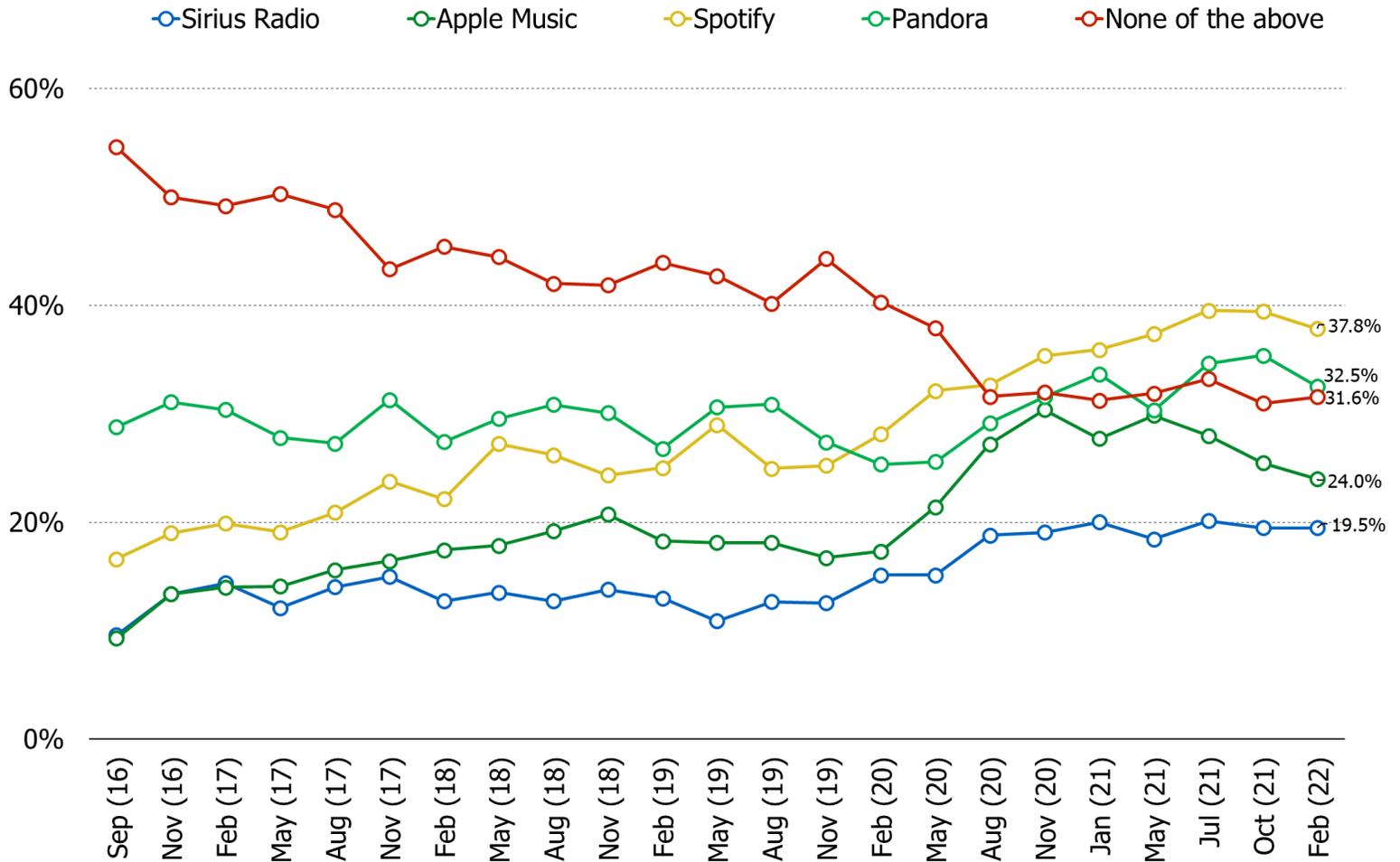
Posed to Spotify account holders.



STREAMING AND SATELLITE AUDIO TRENDS

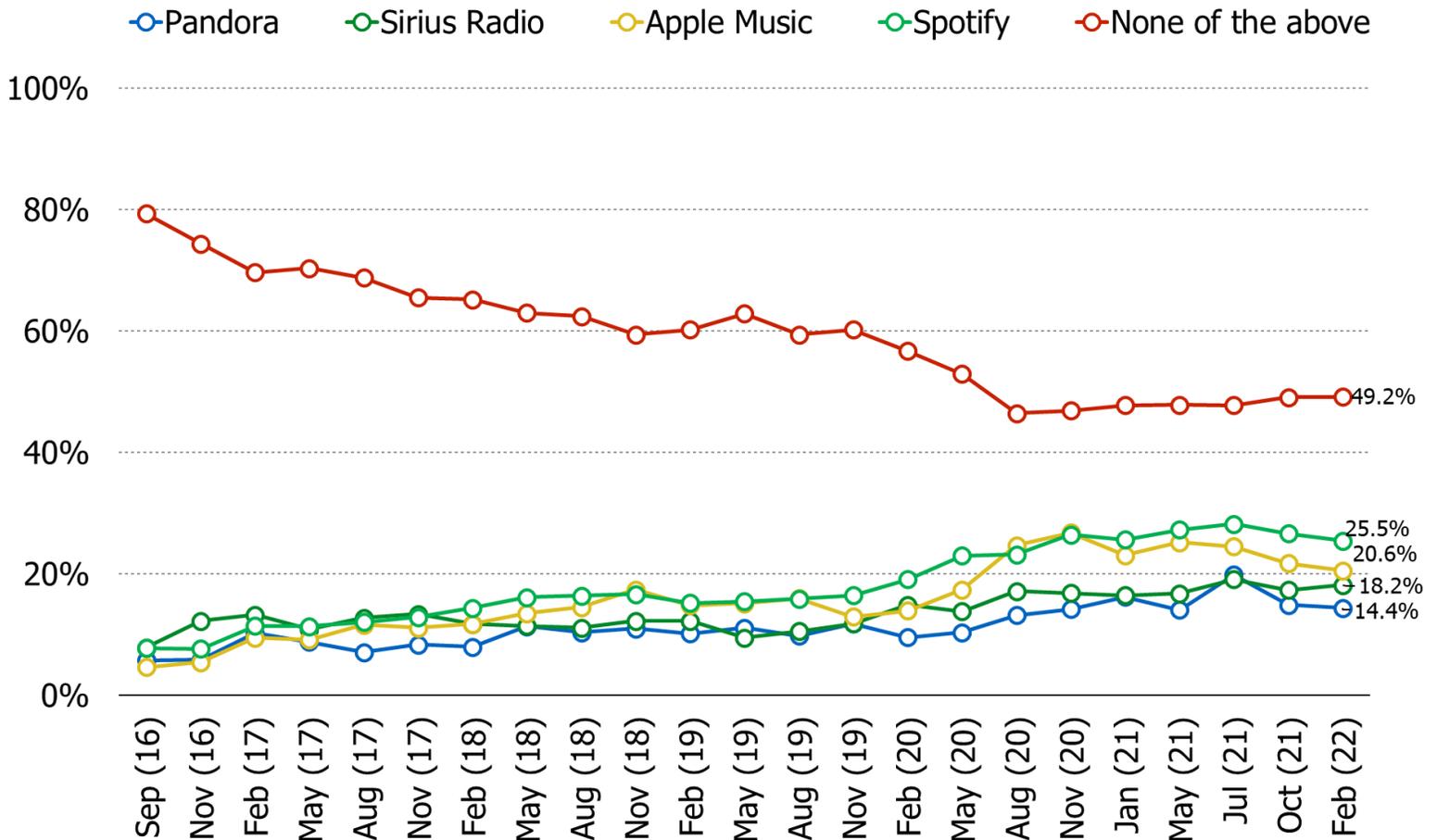
DO YOU HAVE AN ACCOUNT WITH ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.



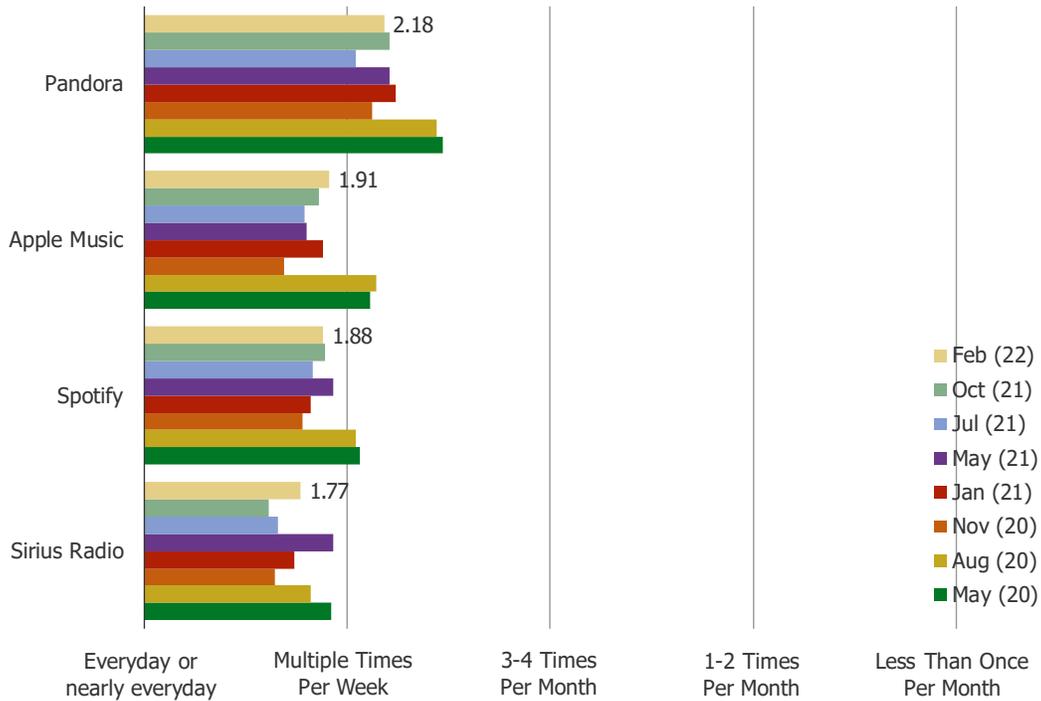
ARE YOU CURRENTLY PAYING FOR A SUBSCRIPTION WITH ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents.



HOW OFTEN DO YOU USE THE FOLLOWING?

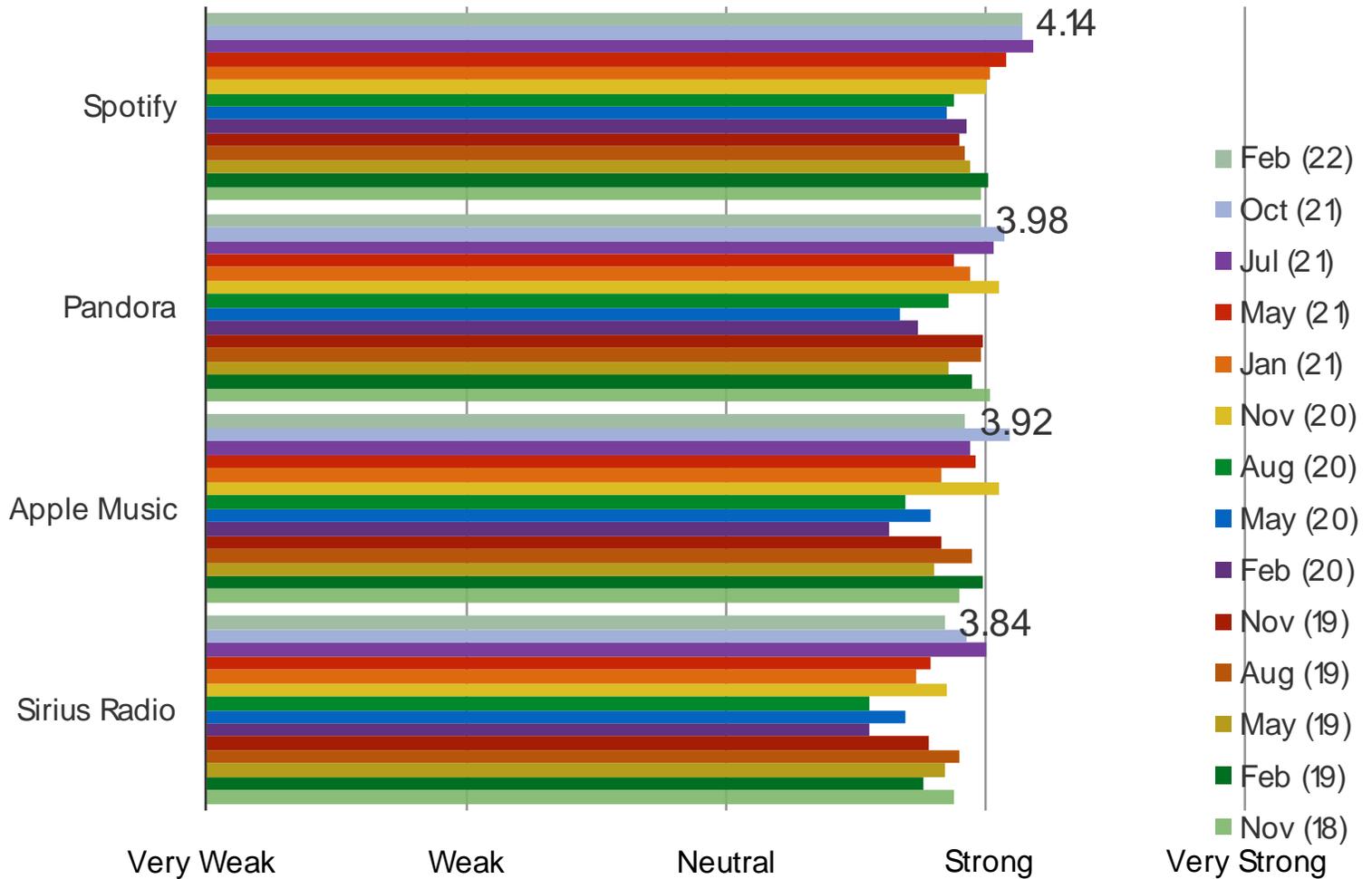
Respondents who have an account with each platform (free or paid)



← More Frequent

WHAT IS YOUR OPINION OF THE VALUE YOU GET FOR YOUR MONEY IN PAYING FOR THIS PLATFORM?

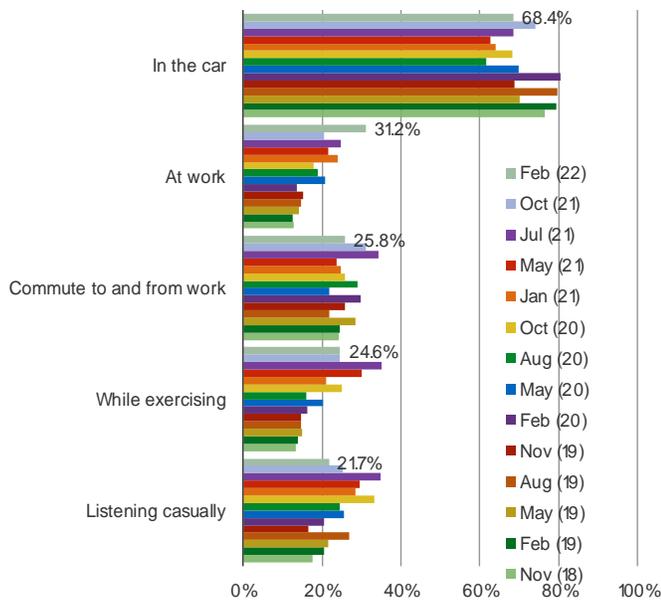
Respondents who pay for each platform



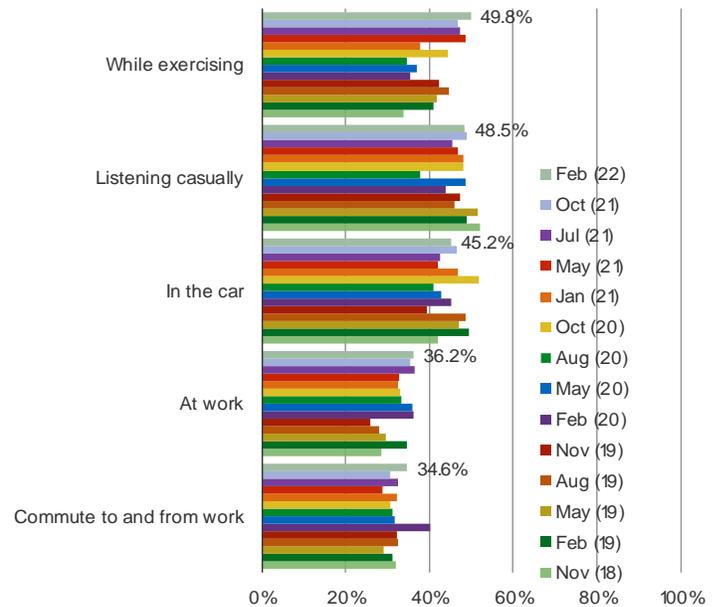
WHERE DO YOU TYPICALLY LISTEN TO THIS PLATFORM? (SELECT ALL THAT APPLY)

Respondents who have an account with each platform (free or paid)

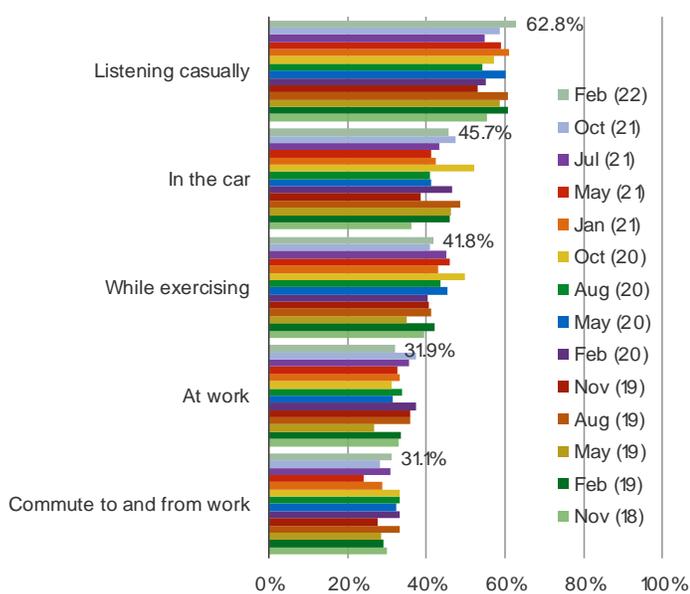
SIRIUS XM



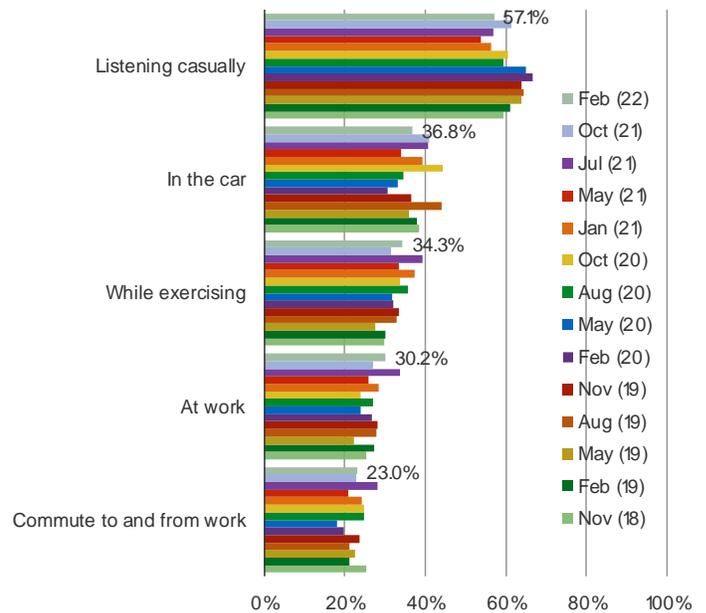
APPLE MUSIC



SPOTIFY

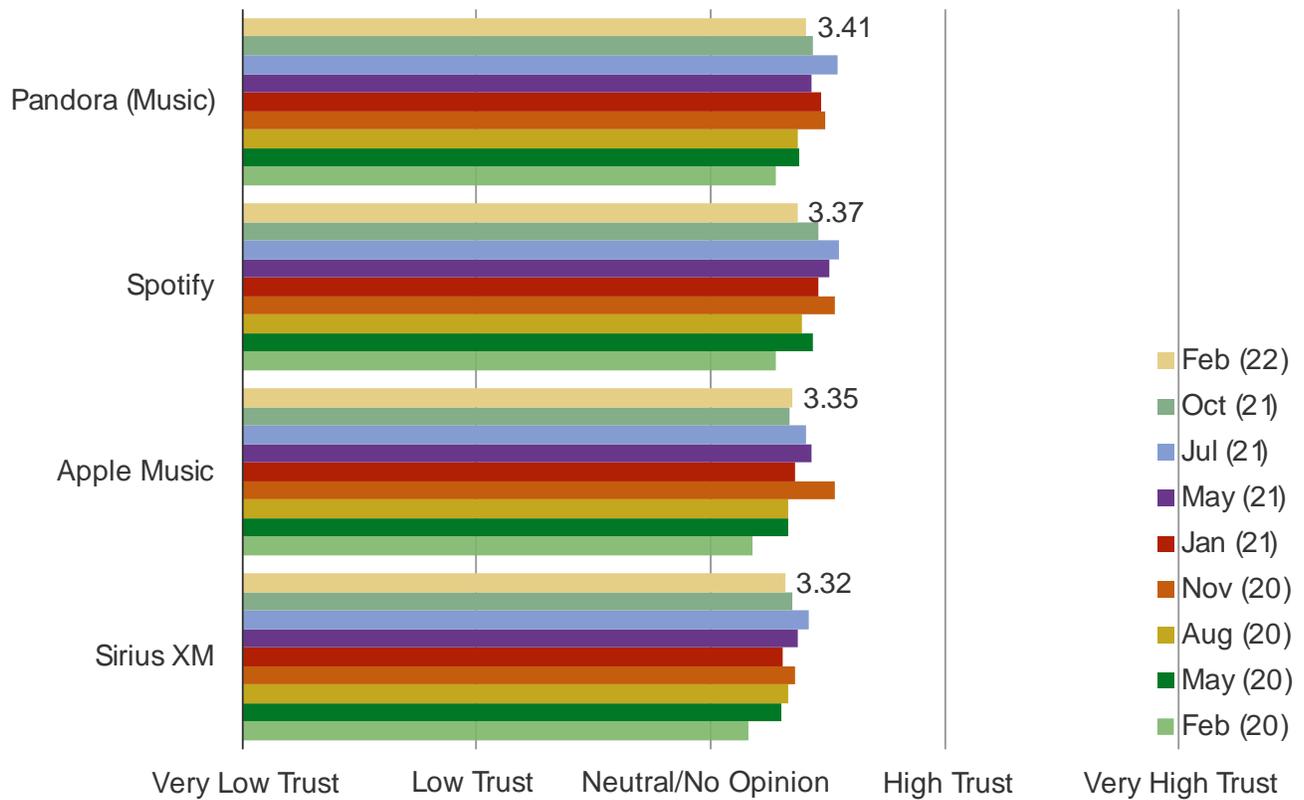


PANDORA



HOW MUCH TRUST WOULD YOU SAY YOU HAVE IN THE FOLLOWING BRANDS?

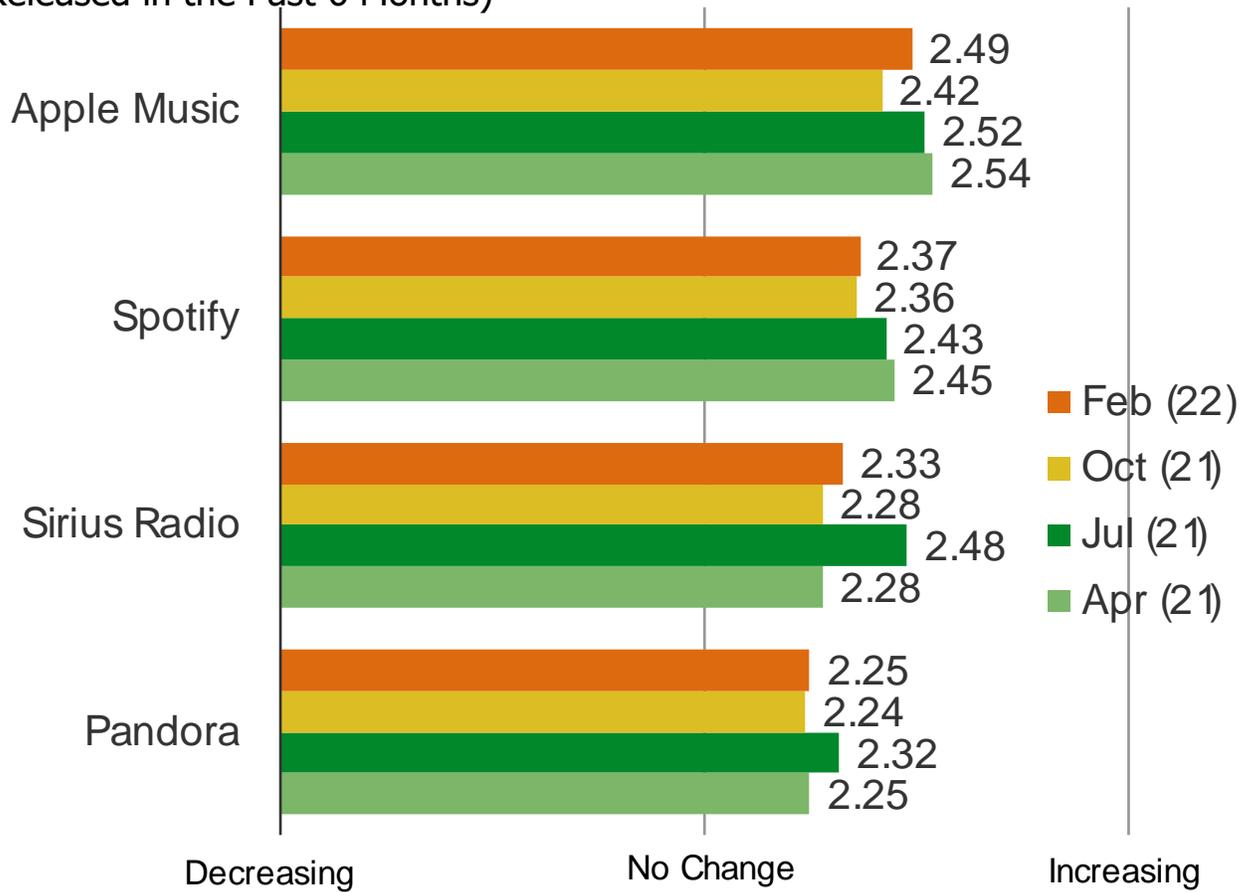
Posed to all respondents



DO YOU FEEL THAT YOUR LISTENING TIME ON THIS PLATFORM IS INCREASING OR DECREASING FOR THE FOLLOWING KIND OF MUSIC...

Posed to users of each platform.

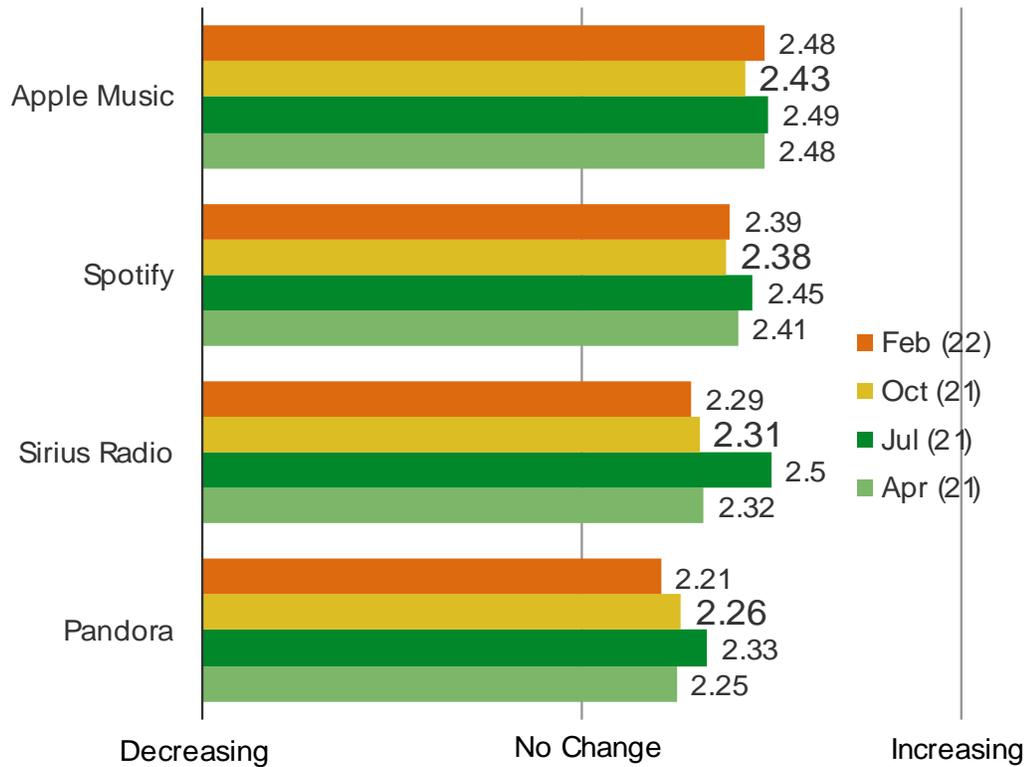
New Music (Released in the Past 6 Months)



DO YOU FEEL THAT YOUR LISTENING TIME ON THIS PLATFORM IS INCREASING OR DECREASING FOR THE FOLLOWING KIND OF MUSIC...

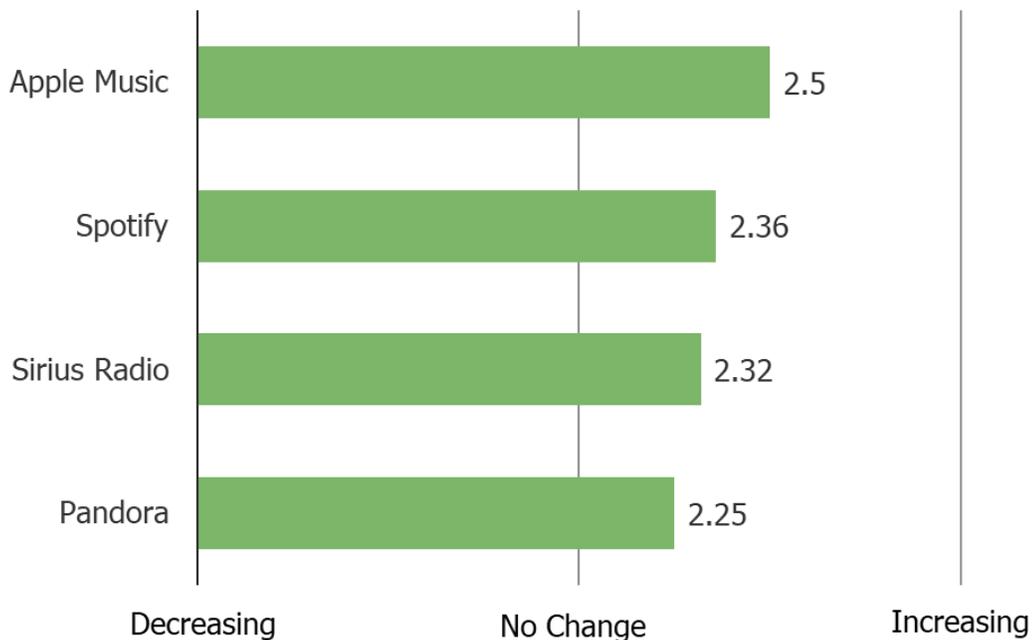
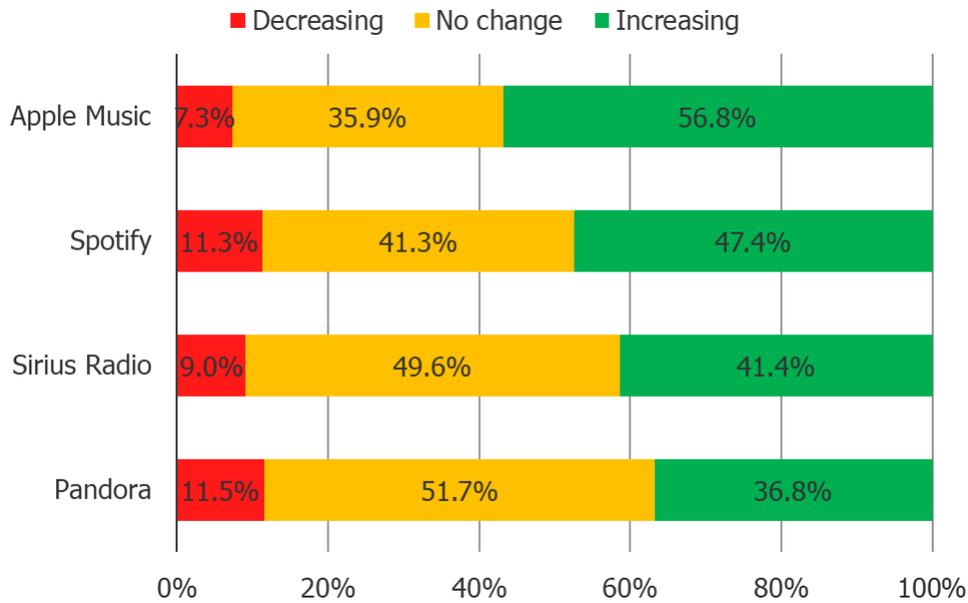
Posed to users of each platform.

Catalog Music (Released 6+ Months Ago)



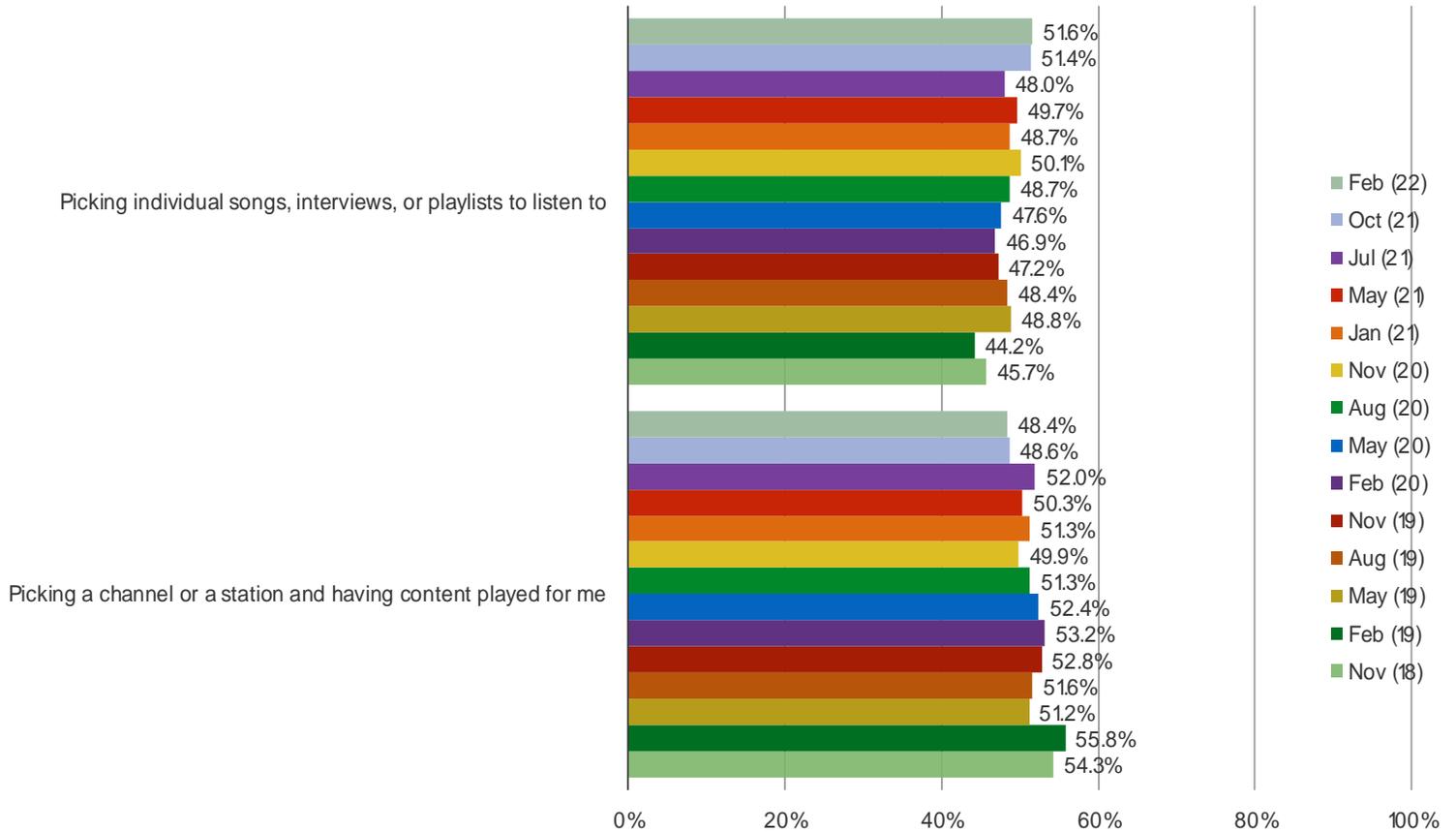
DO YOU FEEL THAT YOUR LISTENING TIME ON THIS PLATFORM IS INCREASING OR DECREASING FOR PODCASTS...

Posed to users of each platform.
Podcasts



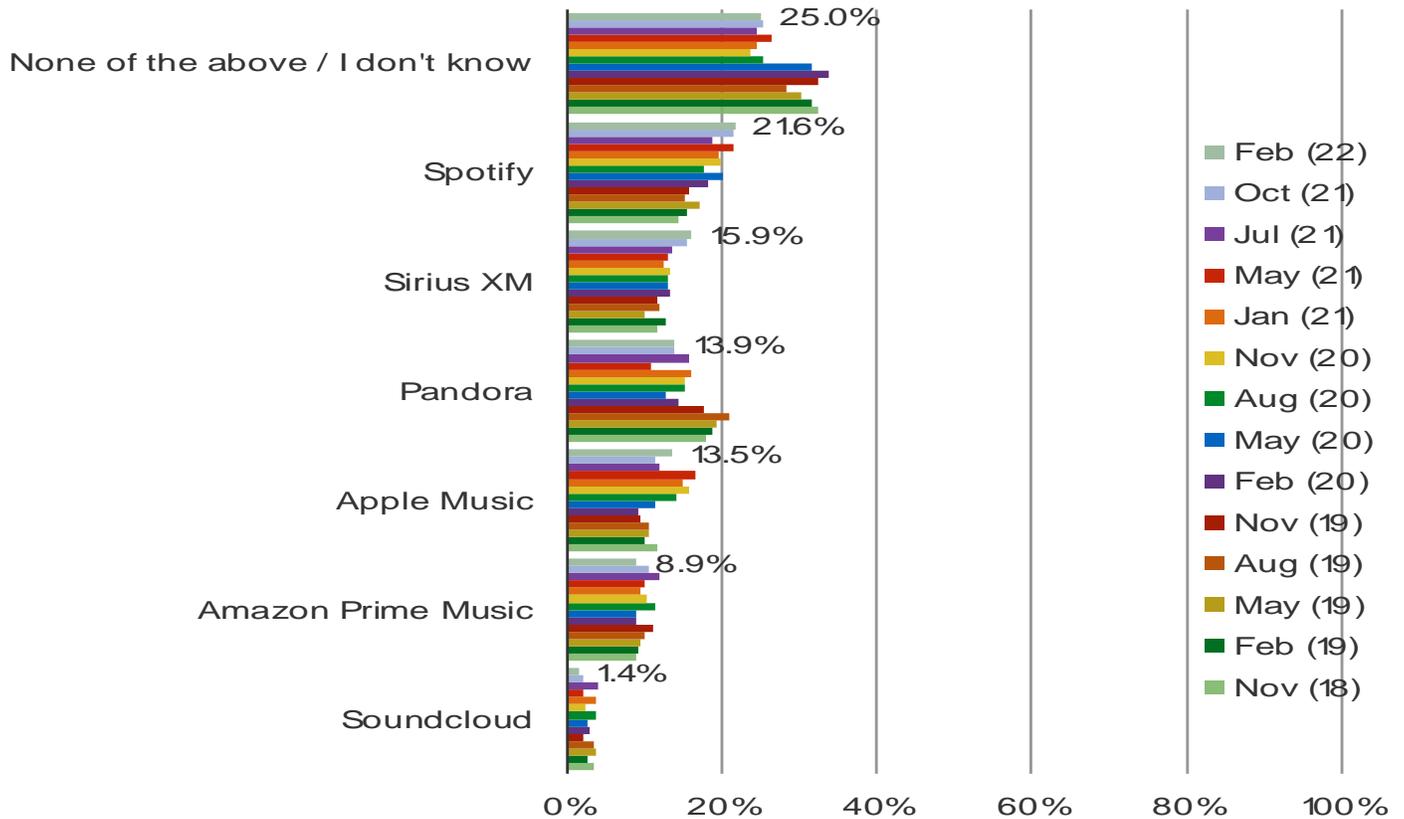
FOR LISTENING TO MUSIC AND TALK-SHOW CONTENT, WHICH IS BETTER?

Posed to all respondents.



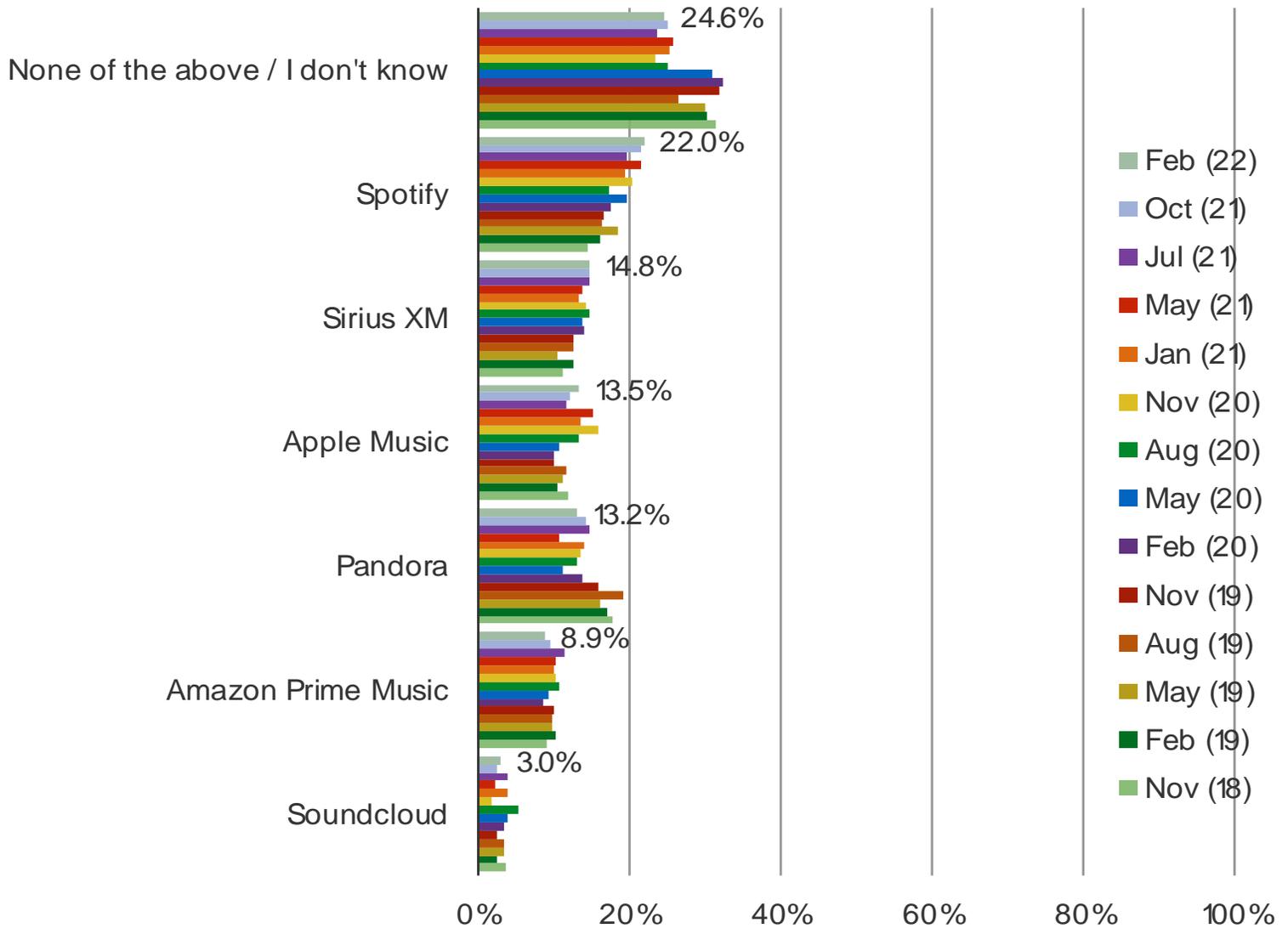
IN YOUR OPINION, WHICH PLATFORM IS BEST WHEN IT COMES TO THE WAY IN WHICH THEY DELIVER CONTENT TO ITS USERS? (IE. THE BEST USER EXPERIENCE)

Posed to all respondents.



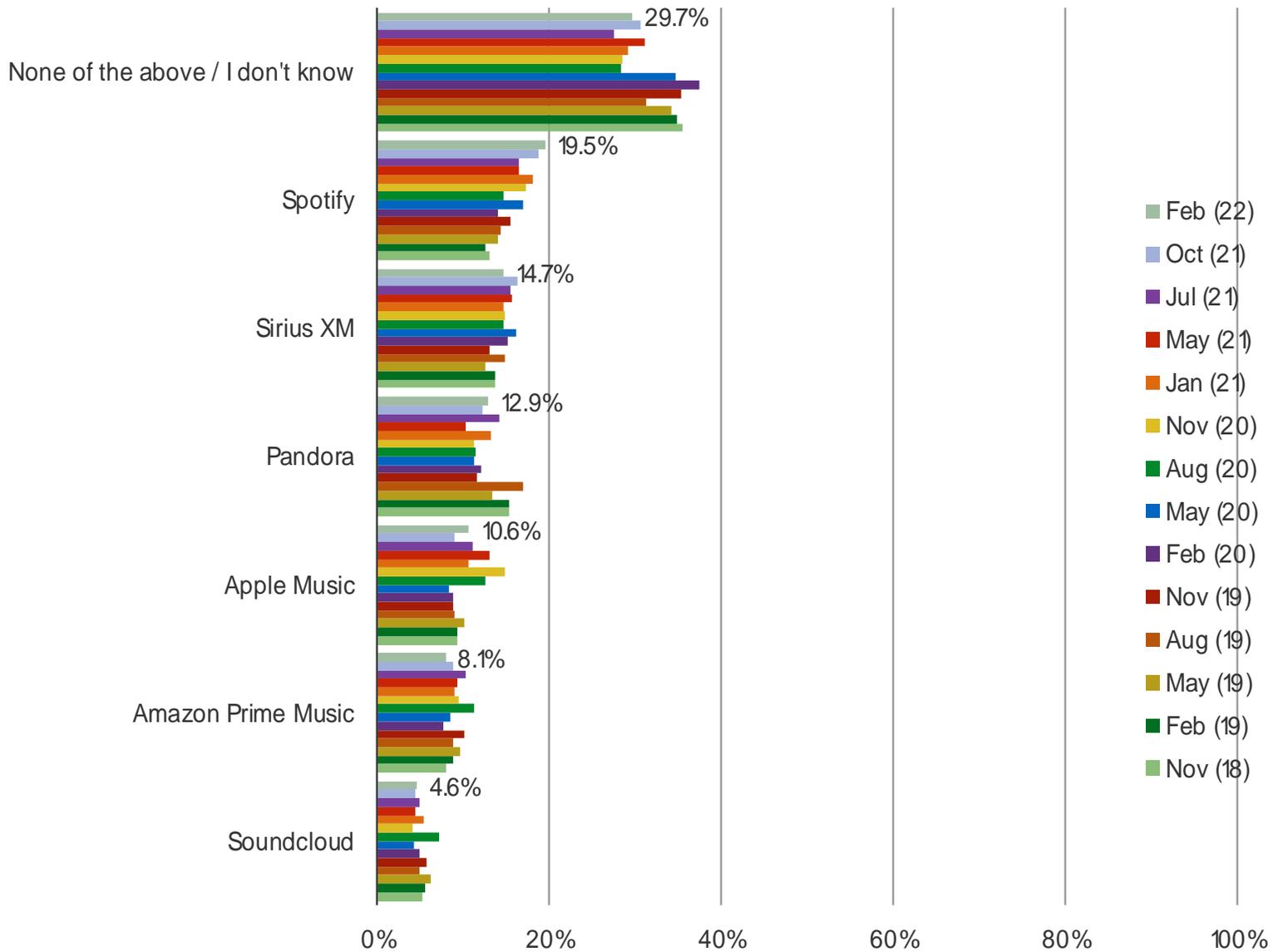
IN YOUR OPINION, WHICH PLATFORM HAS THE BEST CONTENT AVAILABLE?

Posed to all respondents.



IN YOUR OPINION, WHICH PLATFORM HAS THE MOST UNIQUE CONTENT AVAILABLE THAT YOU CAN'T FIND ANYWHERE ELSE?

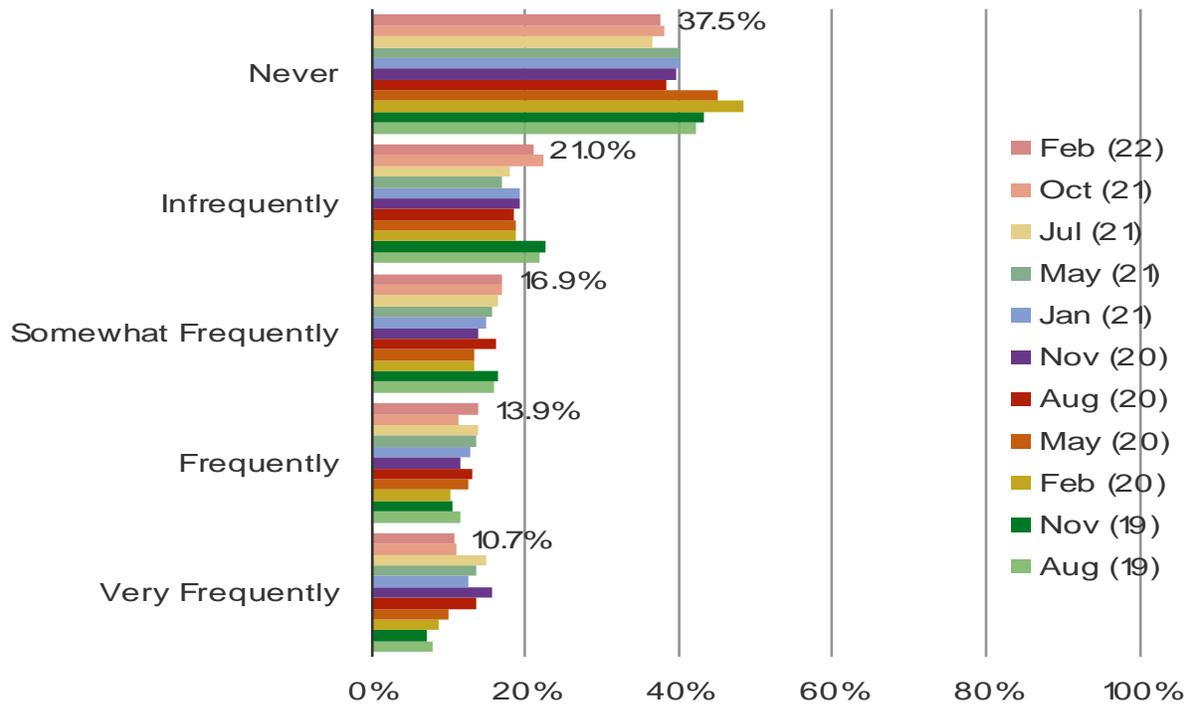
Posed to all respondents.



PODCASTS

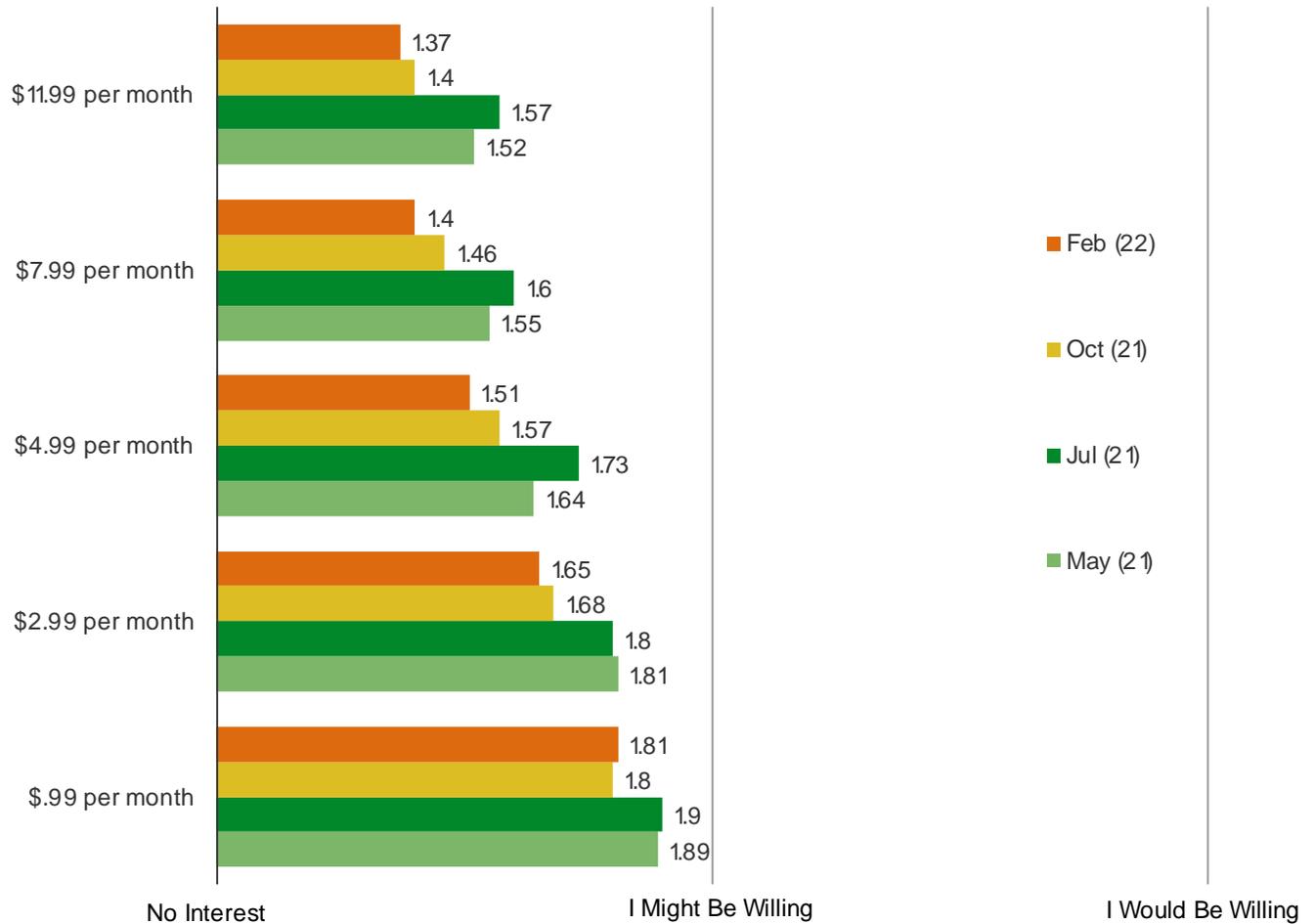
HOW OFTEN DO YOU LISTEN TO PODCASTS?

Posed to all respondents.



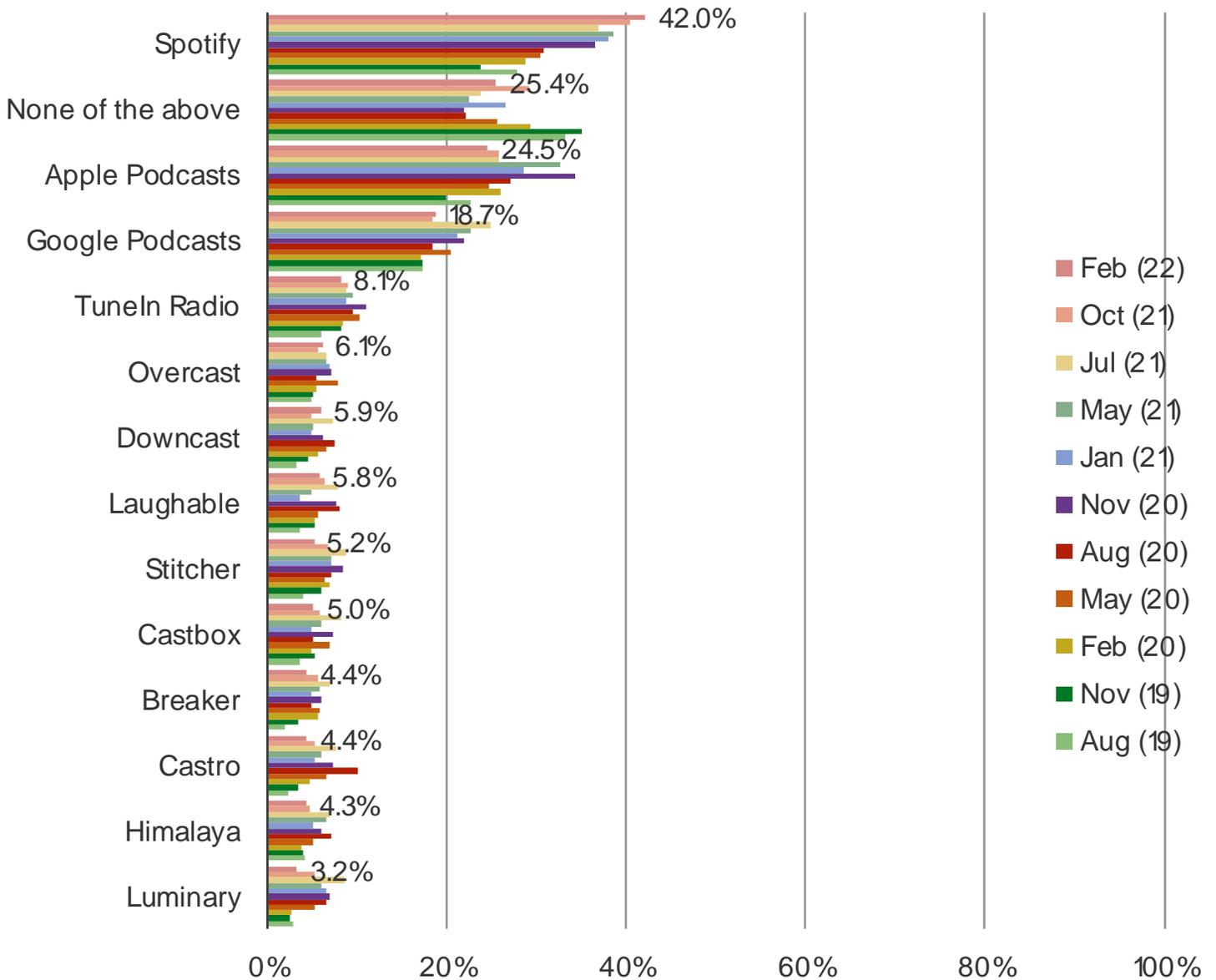
HOW INTERESTED WOULD YOU BE IN PAYING FOR SUBSCRIBER ONLY BONUS EPISODES TO ANY OF THE PODCASTS YOU LISTEN TO OR MIGHT DISCOVER IN THE FUTURE?

Posed to podcast listeners.



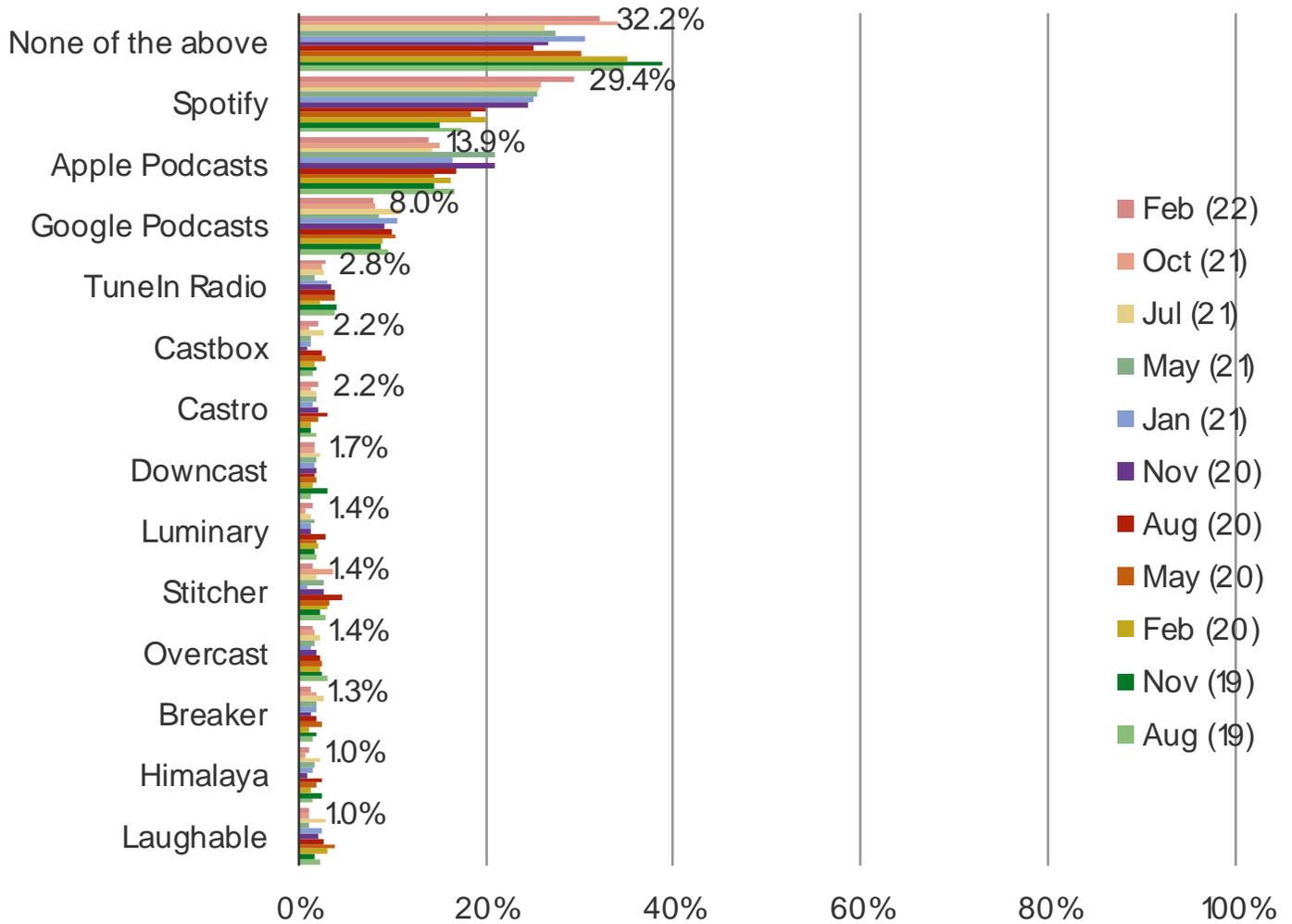
WHICH OF THE FOLLOWING PLATFORMS DO YOU USE TO LISTEN TO PODCASTS?

Posed to respondents who listen to podcasts (more often than never)



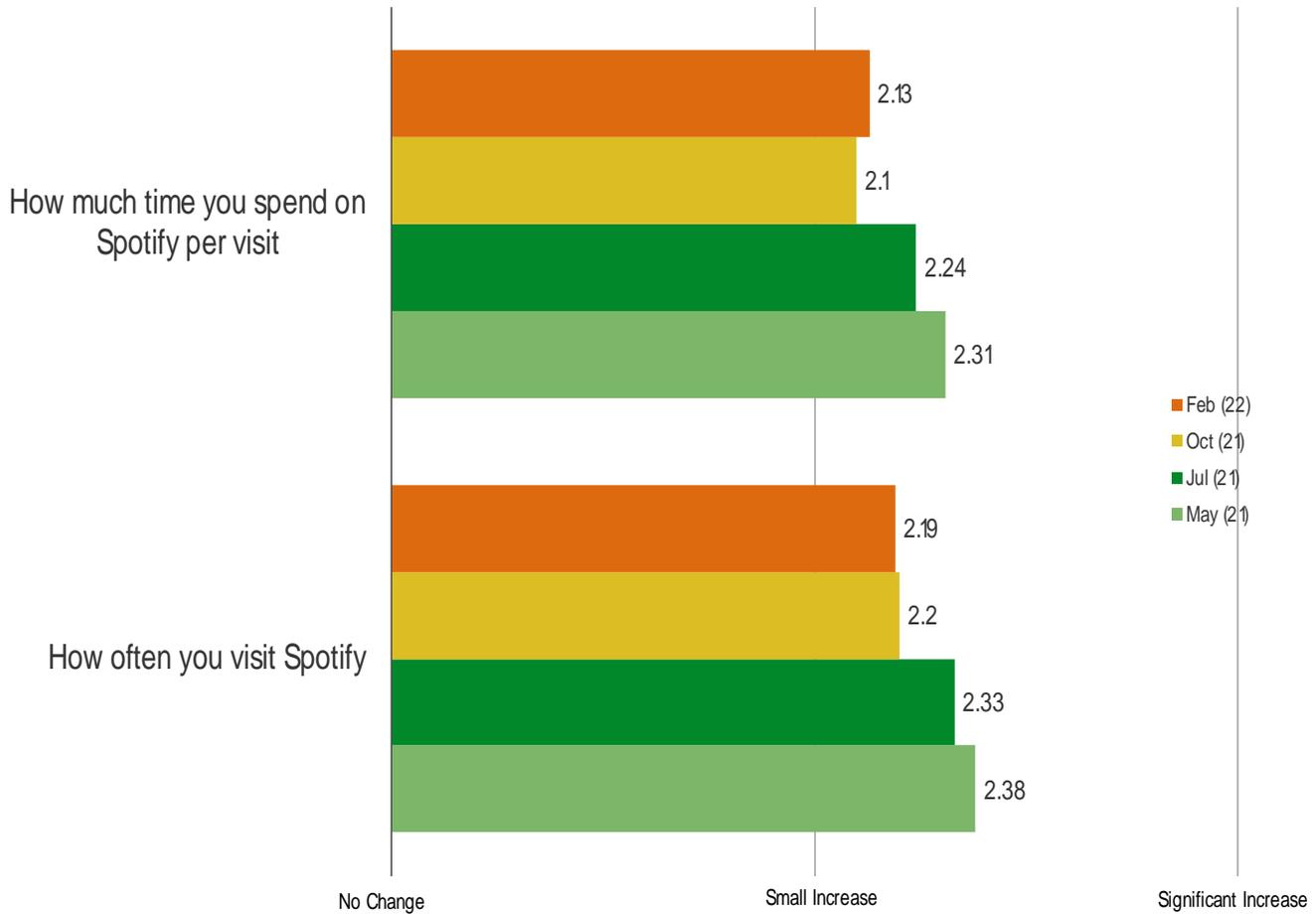
WHICH OF THE FOLLOWING HAS THE MOST UNIQUE PODCAST CONTENT THAT YOU CANNOT FIND ON OTHER PLATFORMS?

Posed to respondents who listen to podcasts (more often than never)



SINCE THE JOE ROGAN EXPERIENCE BECAME AVAILABLE ON SPOTIFY IN SEPTEMBER, HAVE YOU CHANGED...

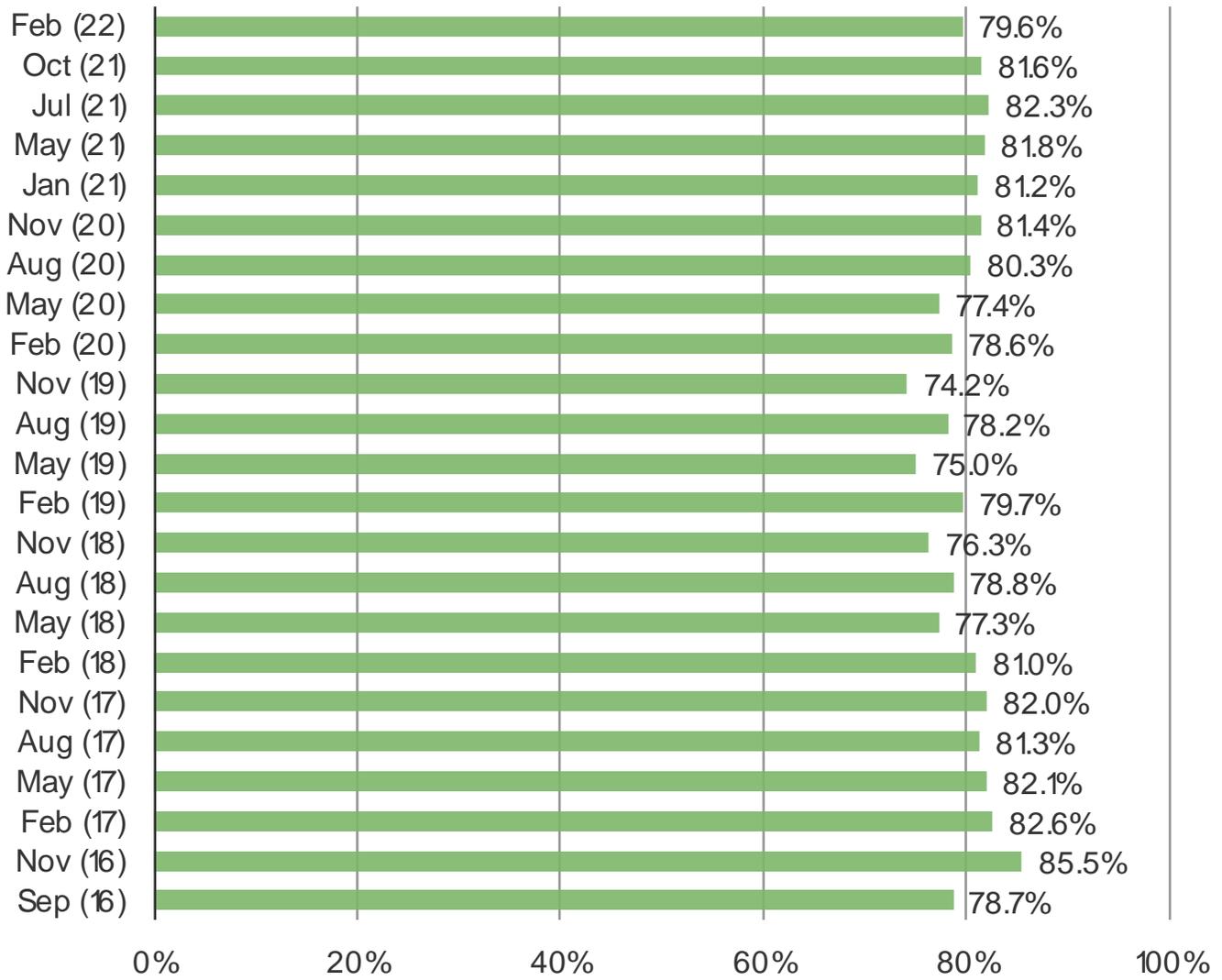
Posed to respondents who listen to Joe Rogan at least somewhat frequently



CONNECTED CAR

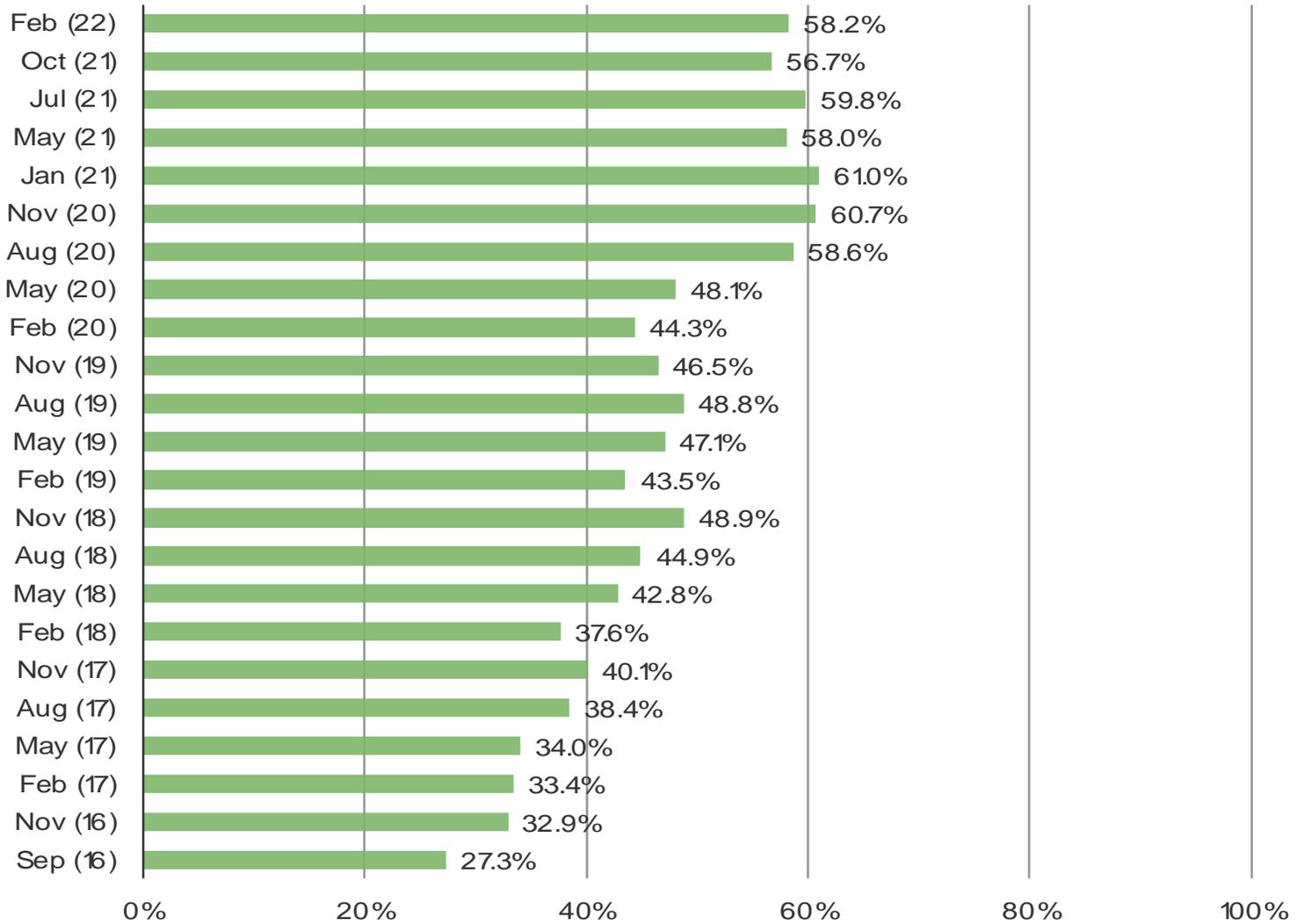
OWNS OR LEASES A CAR

Posed to all respondents



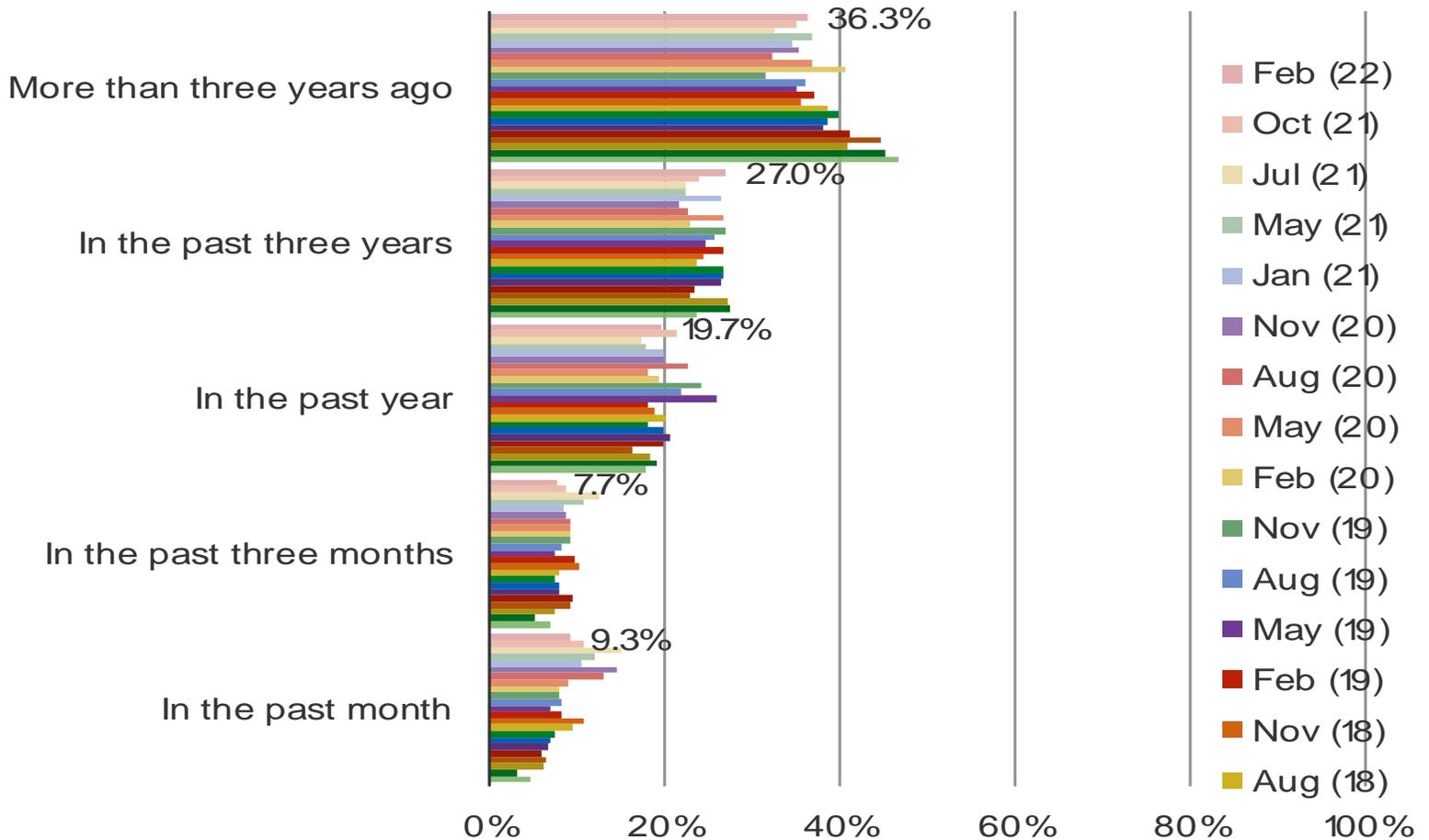
DO YOU EVER CONNECT A SMARTPHONE TO LISTEN TO MUSIC APPS IN YOUR CAR LIKE SPOTIFY, PANDORA, APPLE MUSIC, ETC?

Posed to all respondents who own / lease a car



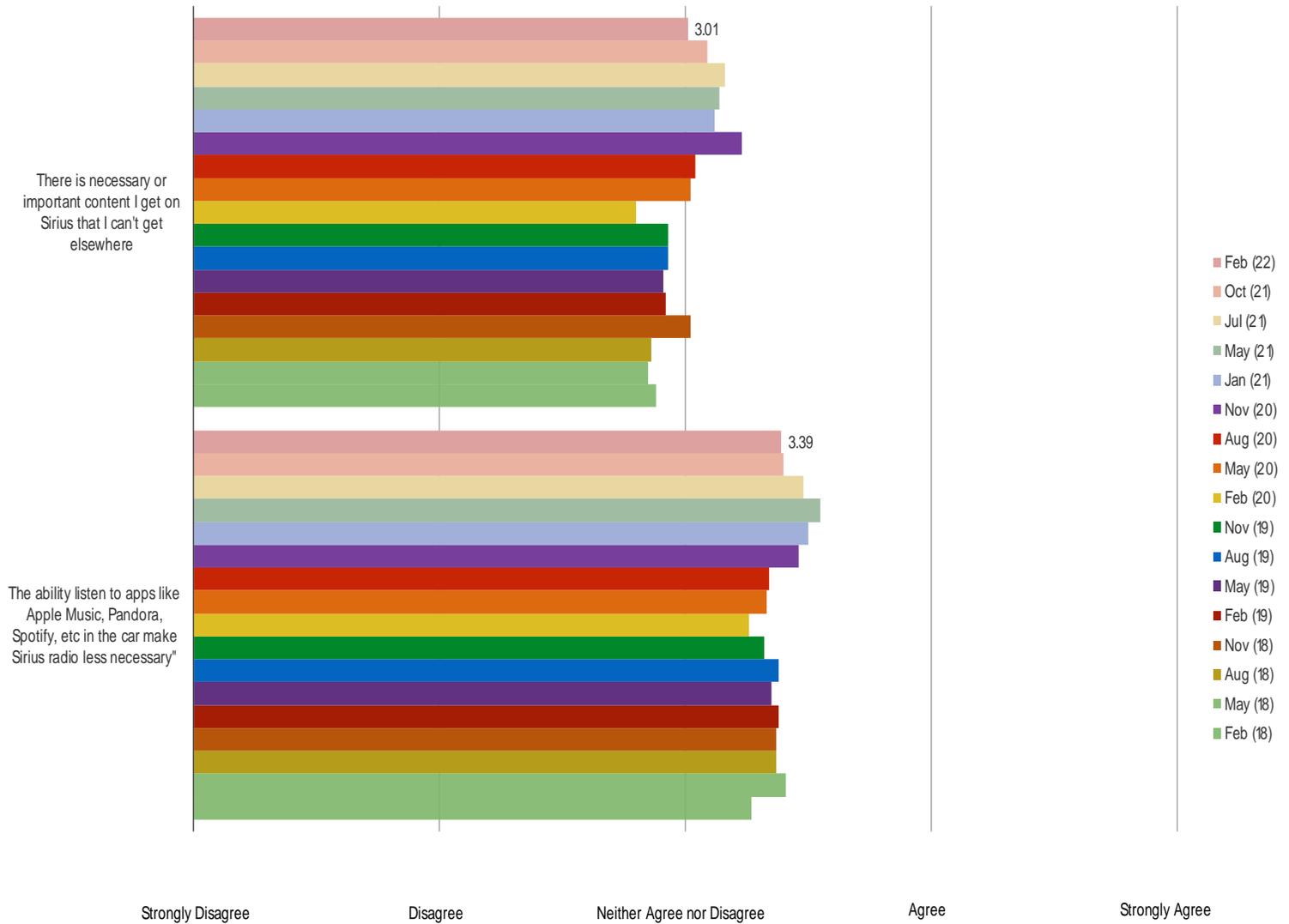
WHEN IS THE LAST TIME YOU PURCHASED OR LEASED A CAR?

Posed to all respondents who own / lease a car



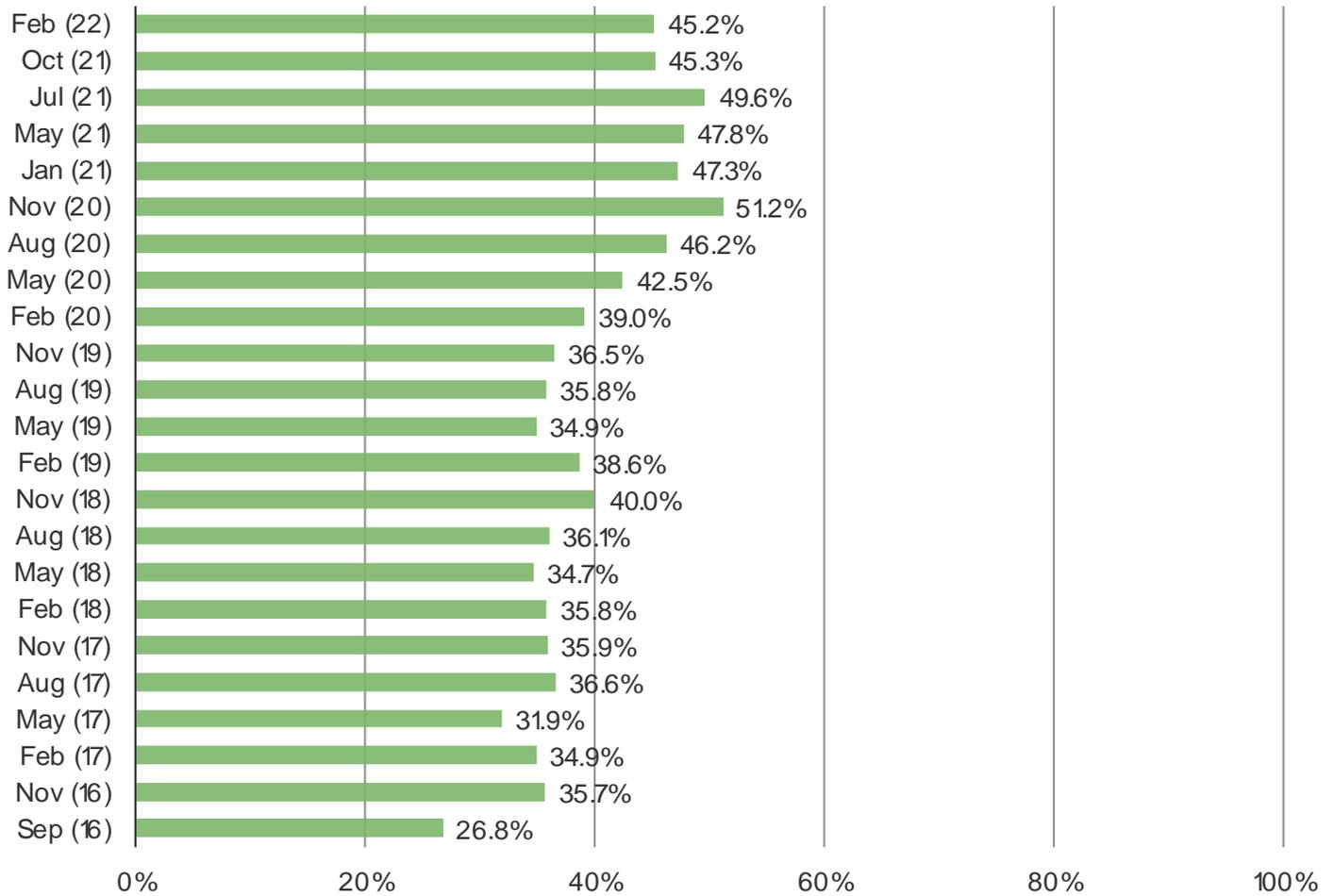
HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS:

Posed to all respondents who own / lease a car



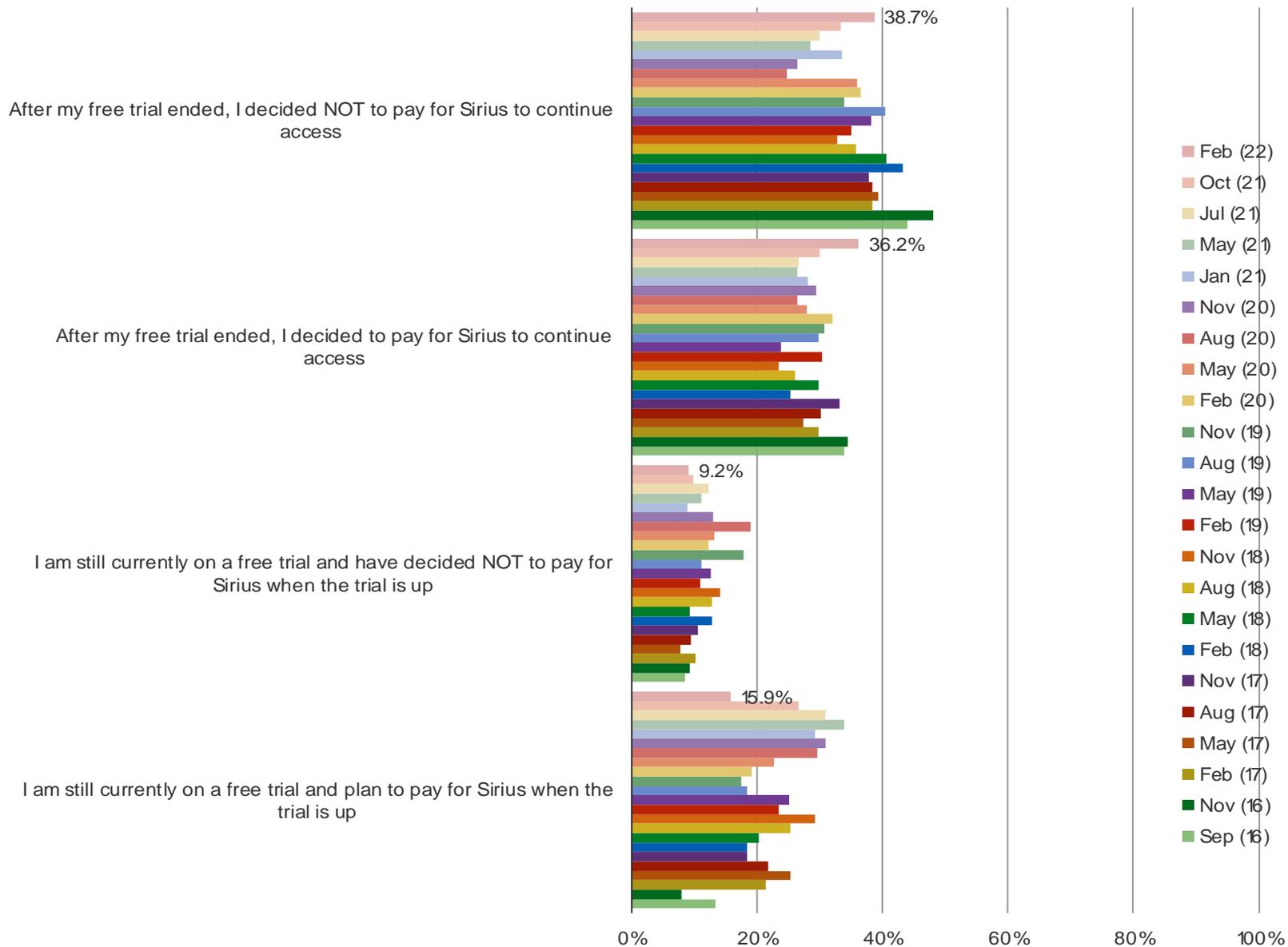
WHEN YOU MOST RECENTLY LEASED OR BOUGHT A CAR, DID IT COME WITH A FREE TRIAL TO SIRIUS RADIO?

Posed to all respondents who own / lease a car



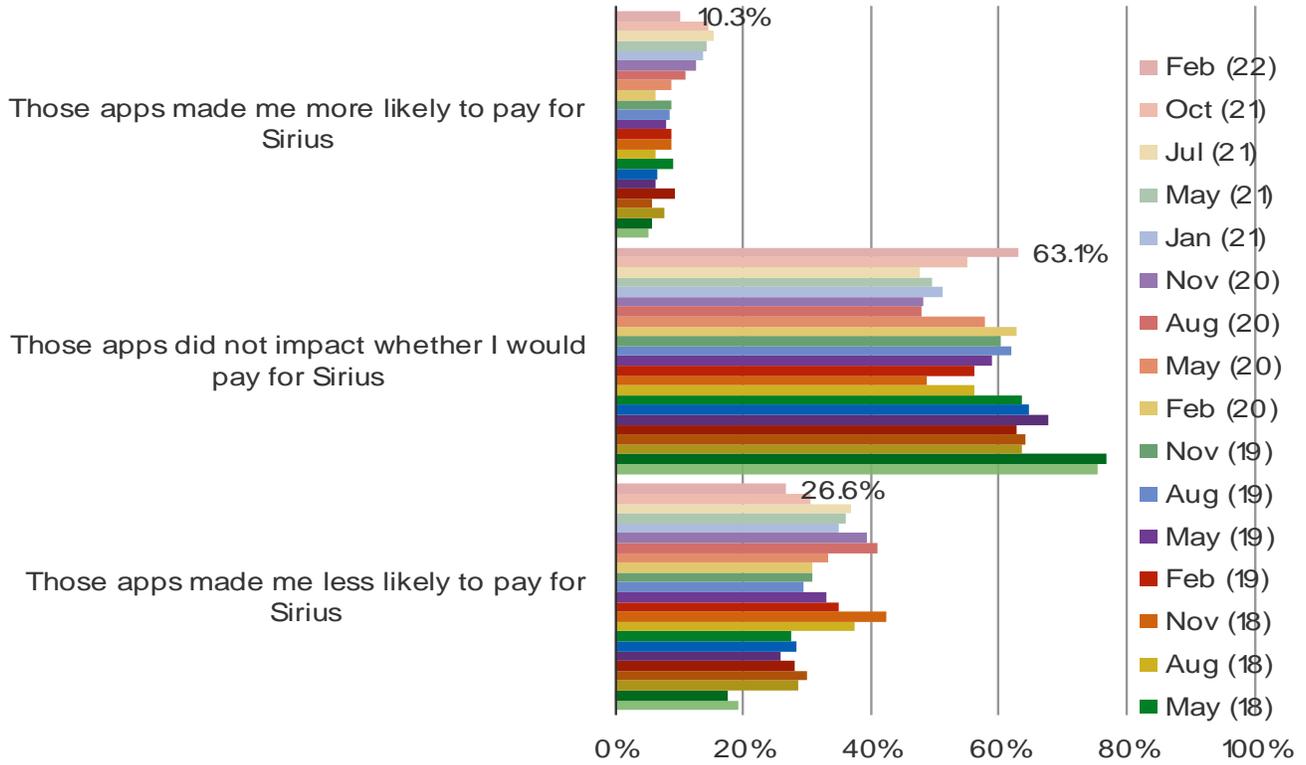
WHEN THE FREE TRIAL WAS UP, WHAT DID YOU DO?

Posed to respondents who had a free trial when they most recently got a new car.



DID APPS LIKE PANDORA, SPOTIFY, AND APPLE MUSIC INFLUENCE YOUR DECISION REGARDING PAYING FOR ACCESS TO SIRIUS?

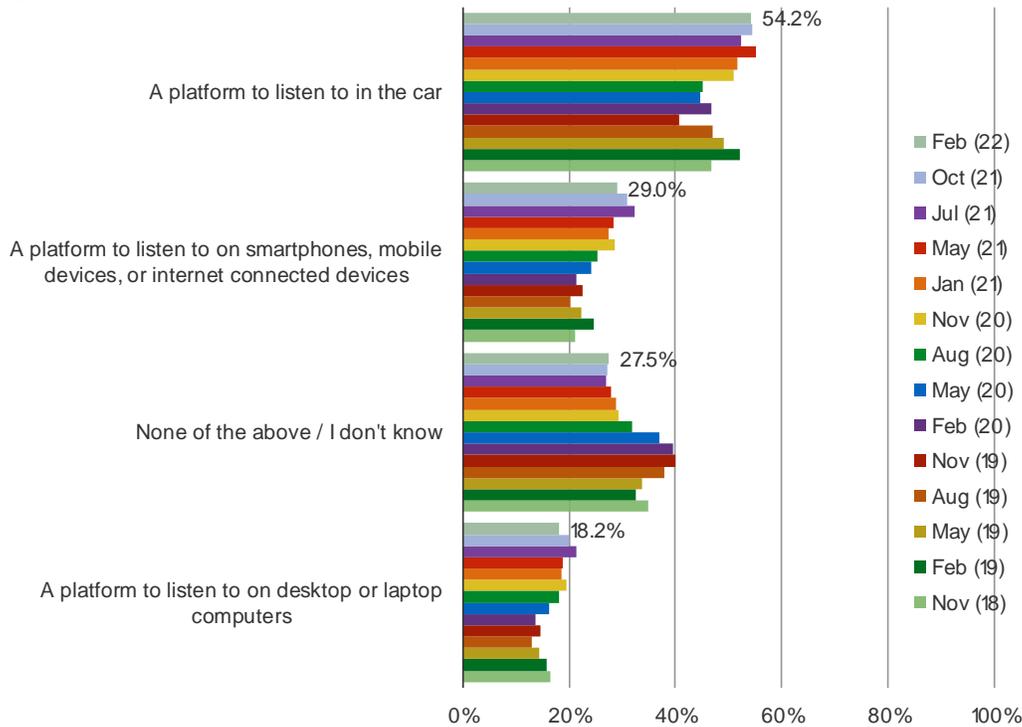
Posed to respondents who had/have a free trial when they most recently got a new car.



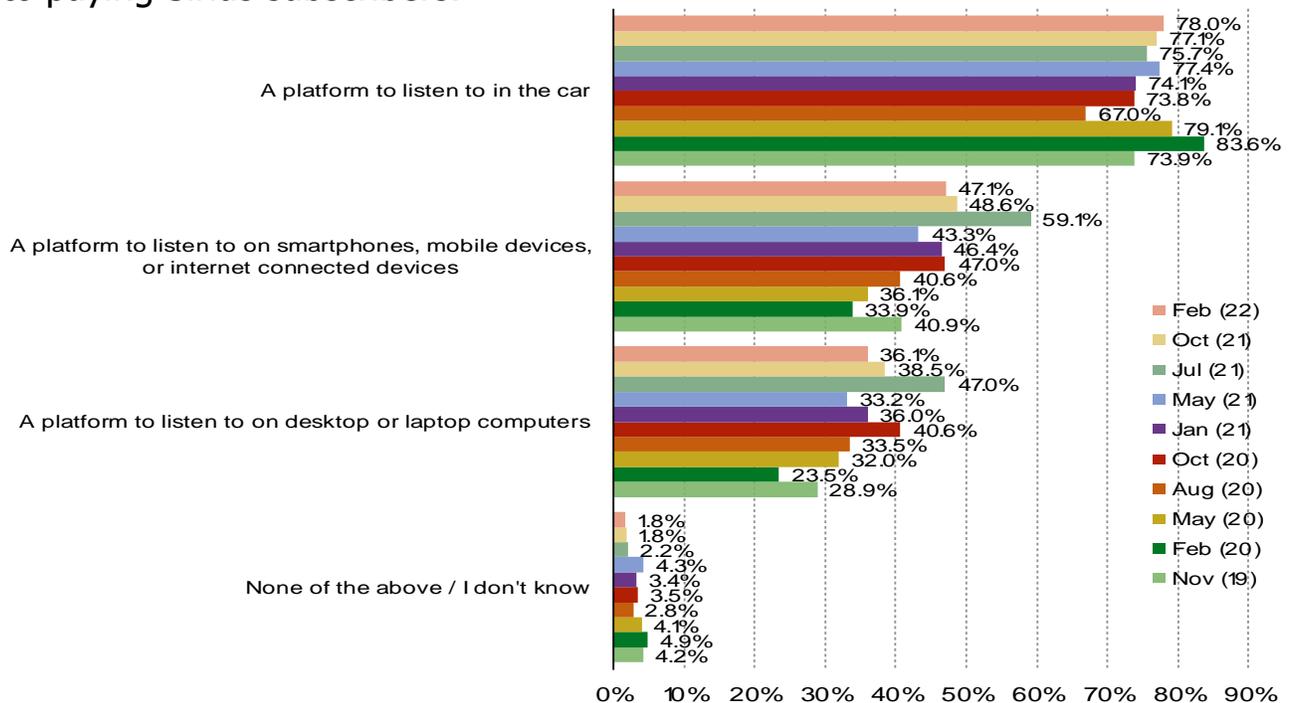
SIRIUS XM

WHAT DO YOU VIEW SIRIUS XM AS? (SELECT ALL THAT APPLY)

Posed to all respondents.

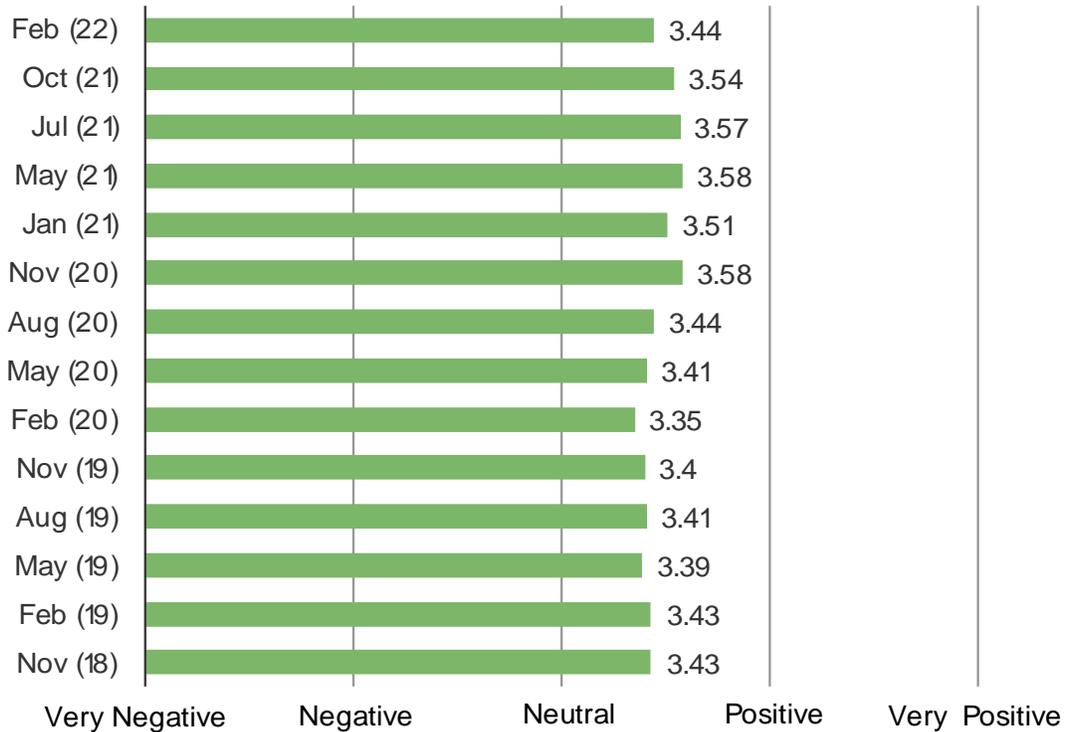


Posed to paying Sirius subscribers.

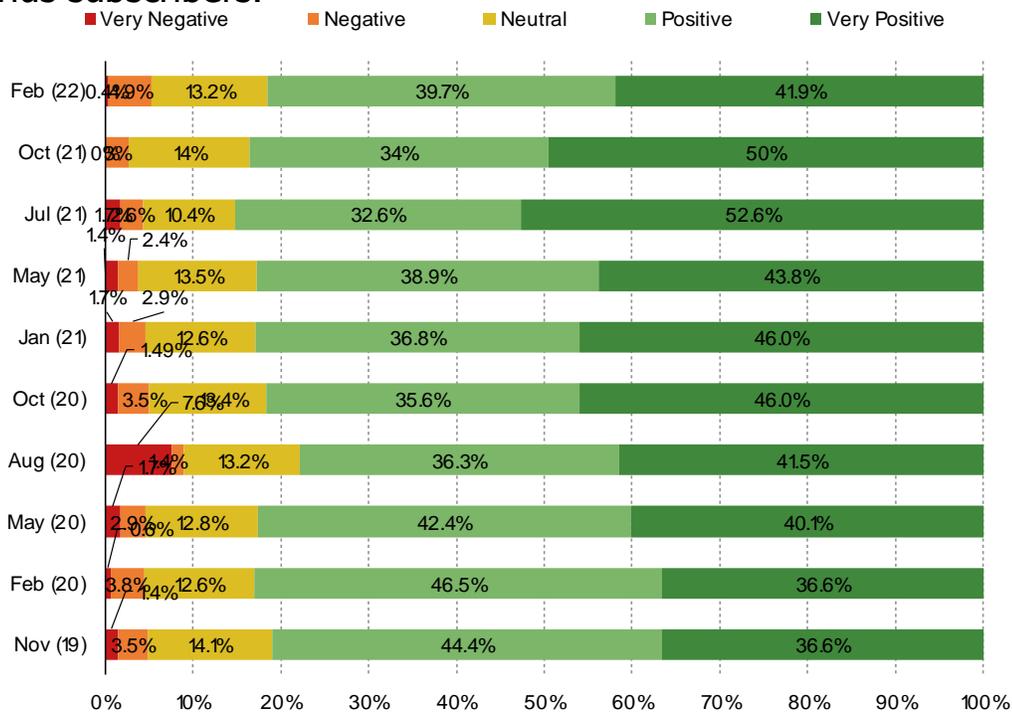


WHAT IS YOUR PERCEPTION OF SIRIUS XM?

Posed to all respondents.



Posed to paying Sirius subscribers.



WHY IS YOUR OPINION NEGATIVE?

Posed to respondents who said they have a negative opinion of Sirius XM.

Quality issues.

It is overpriced.

Because they charged me during a "free" trial.

Because of poor quality connection and low content value.

I think it is outdated, overpriced, and irrelevant.

They hounded me after my trial period ended.

It is outdated and unnecessary with streaming services available.

Because it costs way too much.

We had a trial subscription and it was a PAIN to get it cancelled.

Expensive.

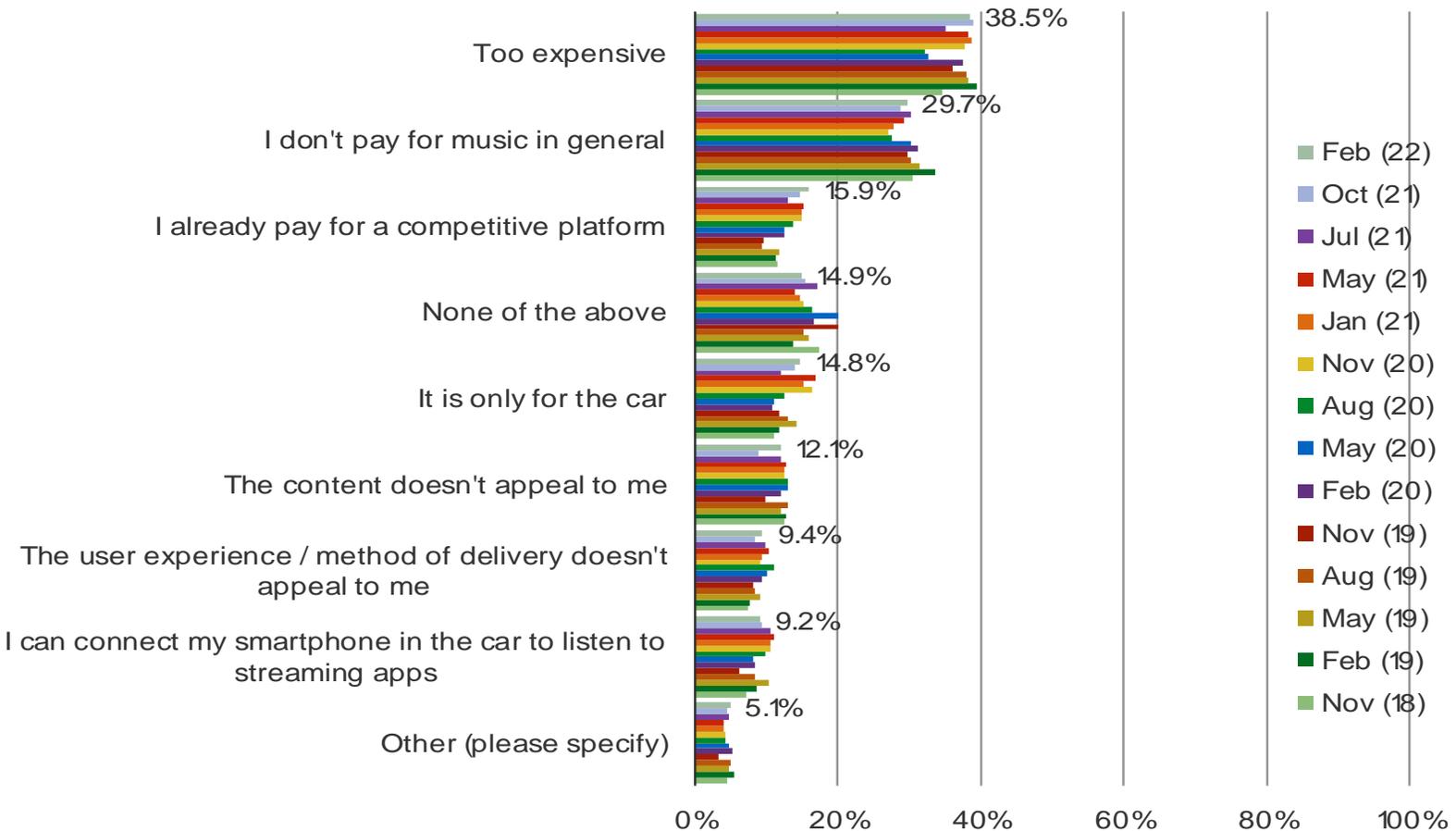
Lot of ads .

It lacks substance.

It cost too much and it is too hard to use.

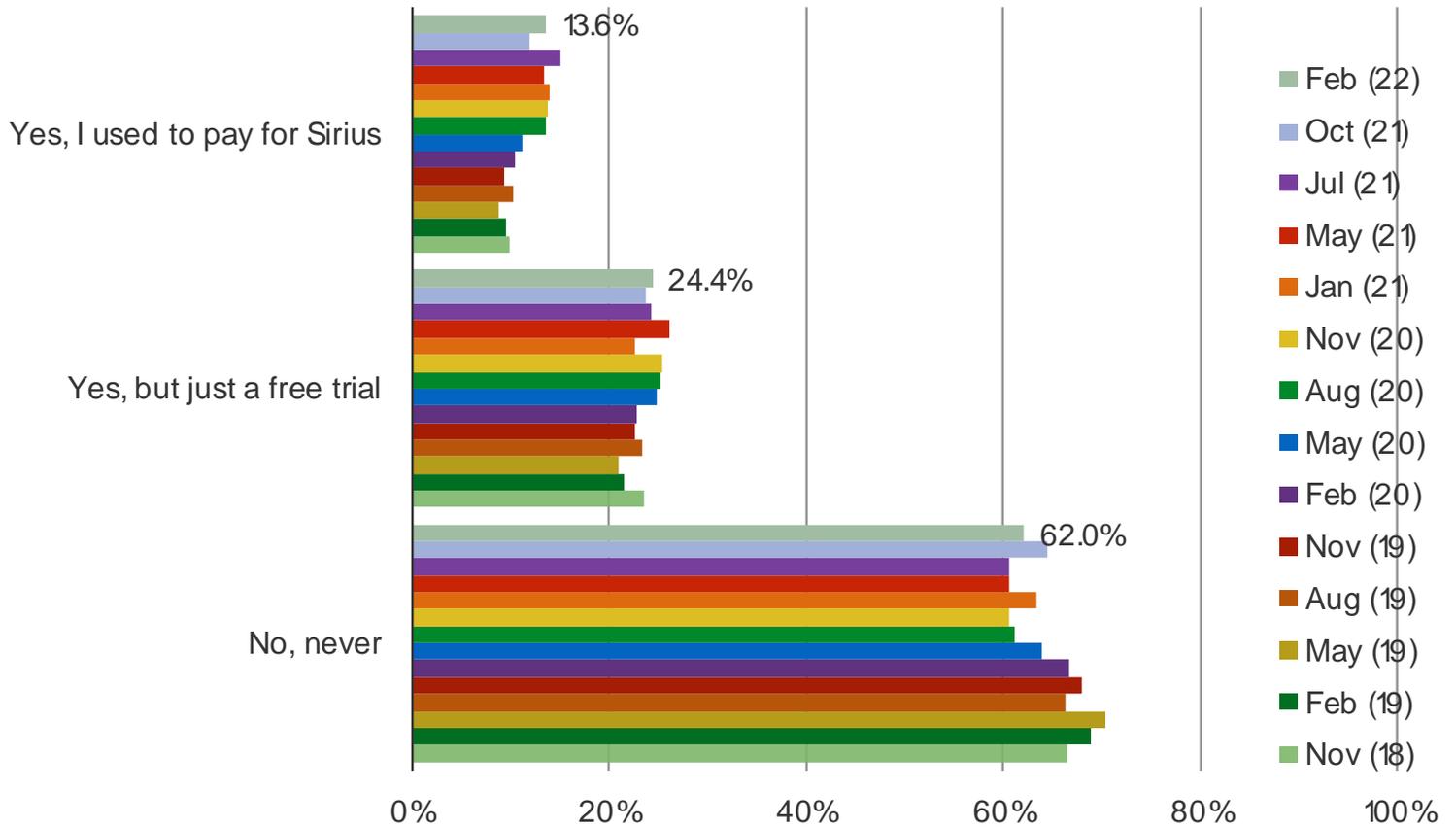
WHY ARE YOU NOT A SIRIUS XM SUBSCRIBER? (SELECT ALL THAT APPLY)

Posed to respondents **who are not subscribers** of Sirius XM.



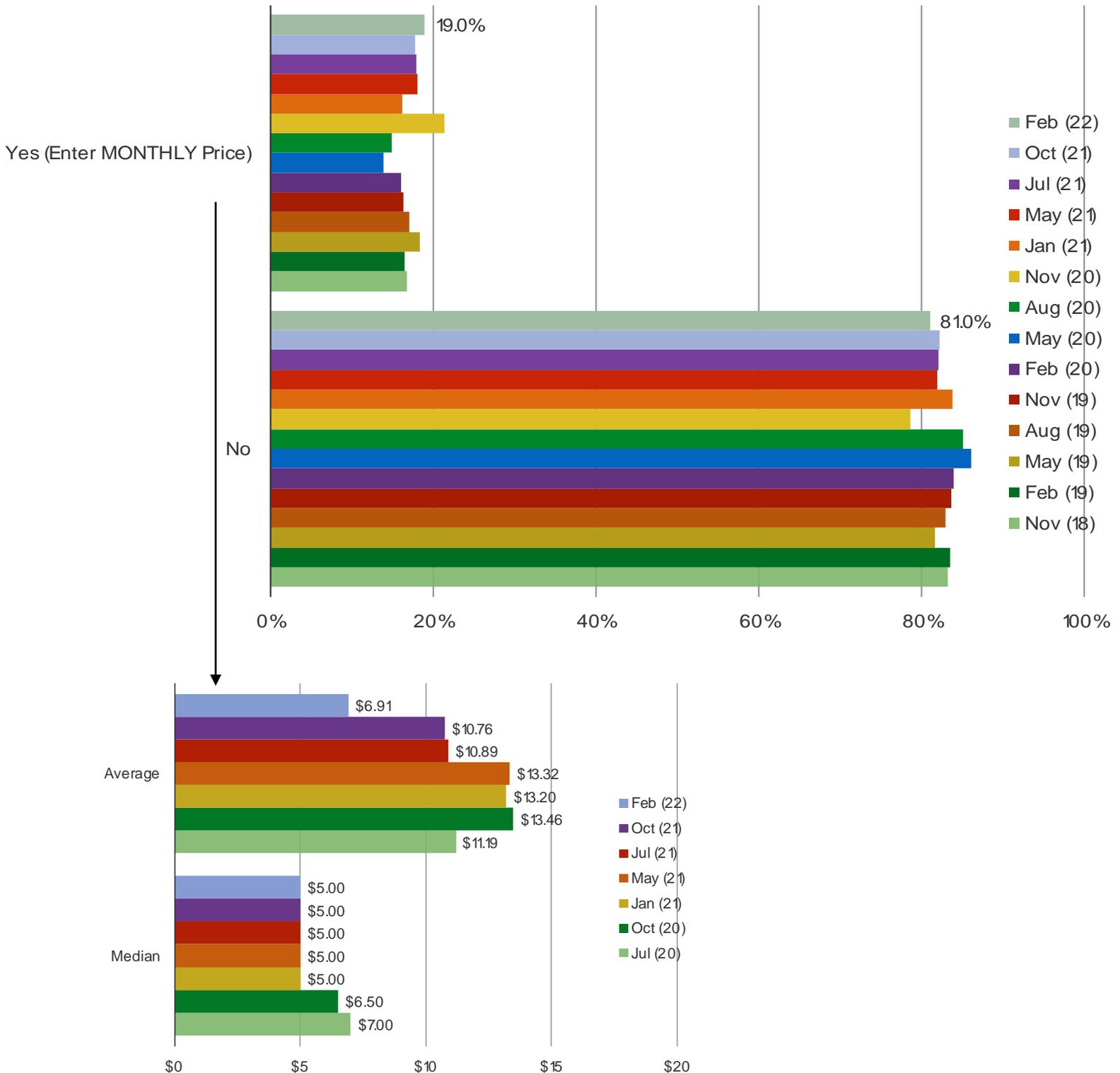
HAVE YOU EVER BEEN A SIRIUS XM SUBSCRIBER?

Posed to non-Sirius XM subscribers.



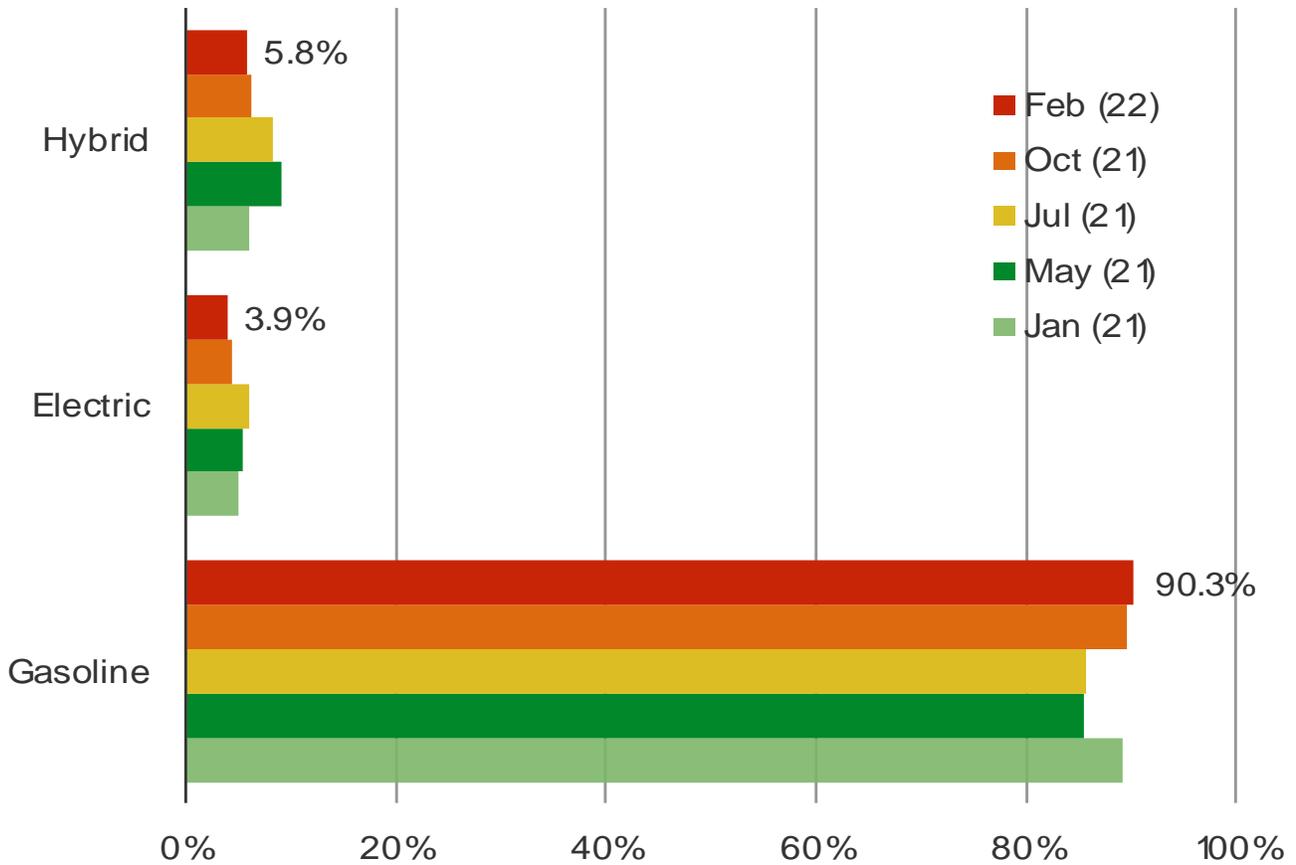
WOULD THERE BE ANY PRICE POINT (PER MONTH) WHERE YOU WOULD DECIDE TO SUBSCRIBE TO SIRIUS XM?

Posed to non-Sirius XM subscribers.



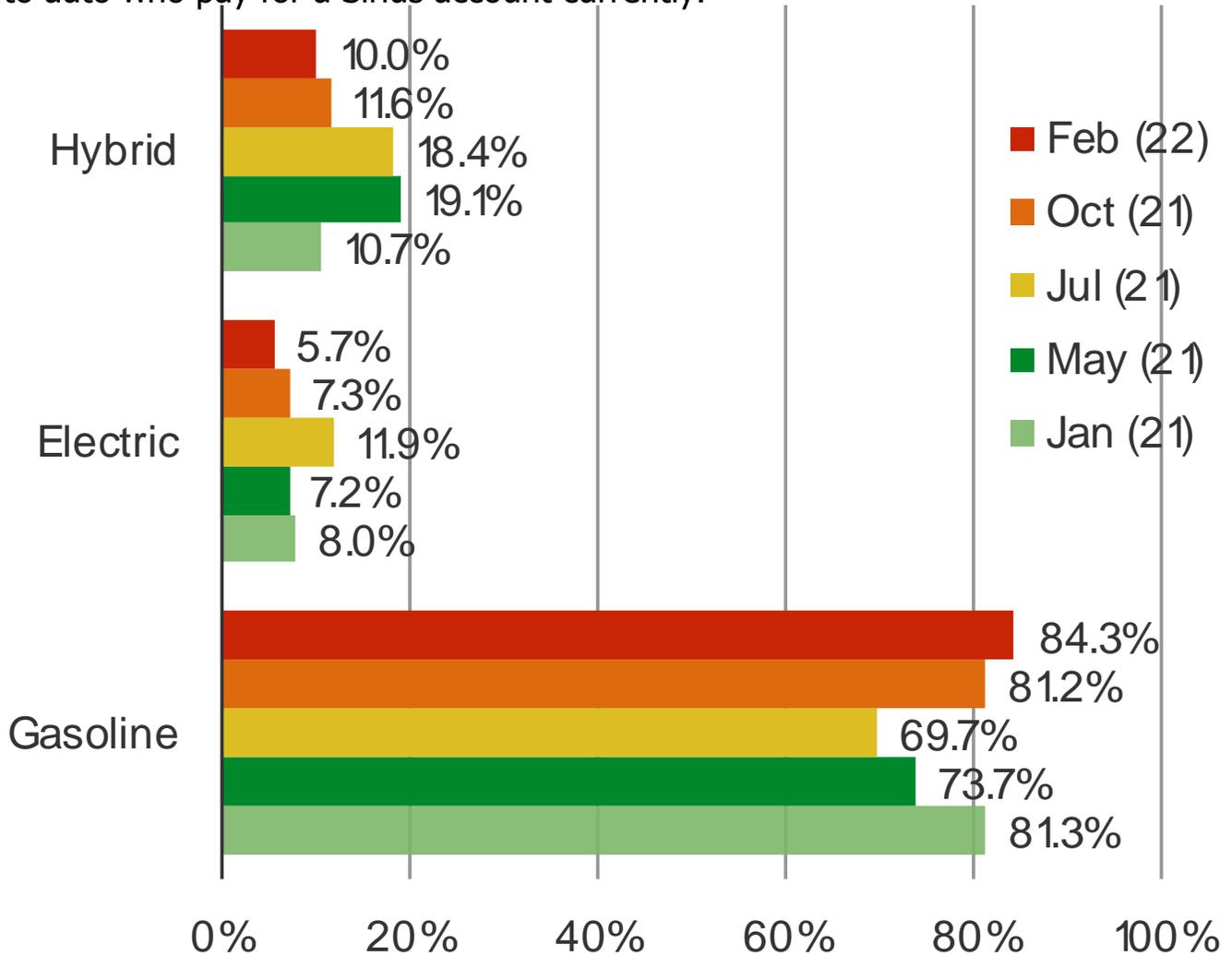
IS YOUR CAR AN ELECTRIC VEHICLE OR DOES IT RUN ON GAS?

Posed to auto owners.



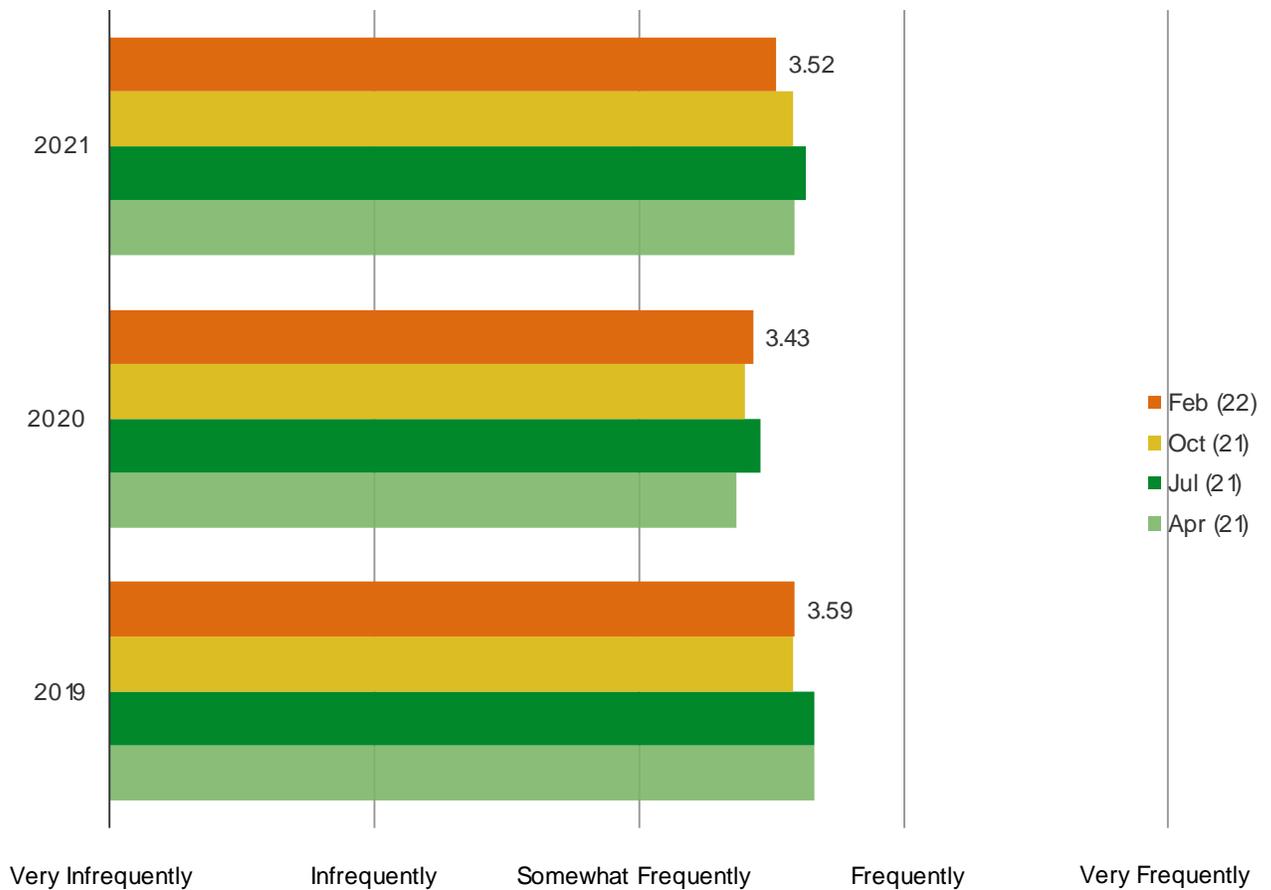
IS YOUR CAR AN ELECTRIC VEHICLE OR DOES IT RUN ON GAS?

Posed to auto who pay for a Sirius account currently.



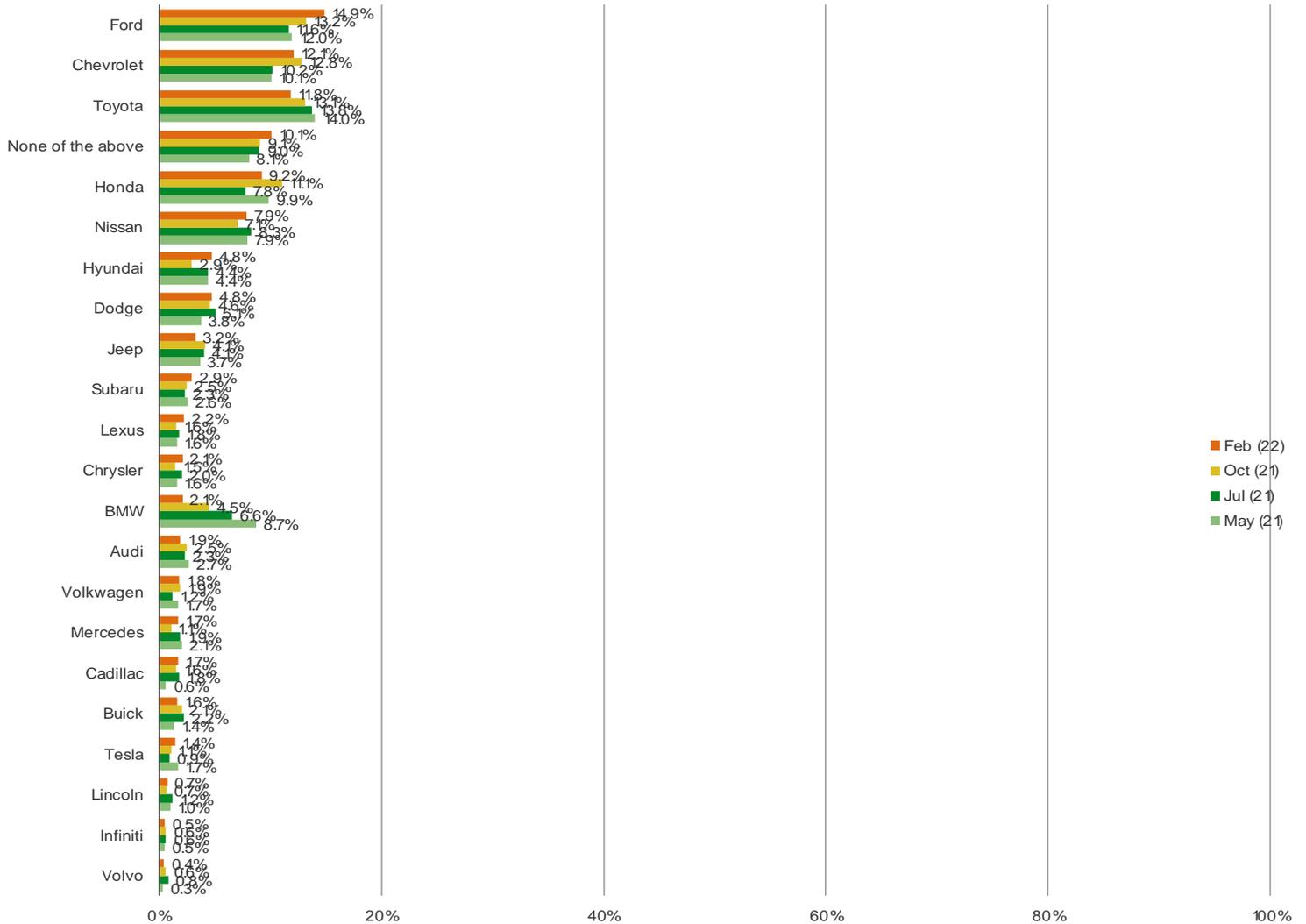
HOW MUCH DID YOU / WILL YOU DRIVE YOUR CAR IN THE FOLLOWING YEARS?

Posed to auto owners.



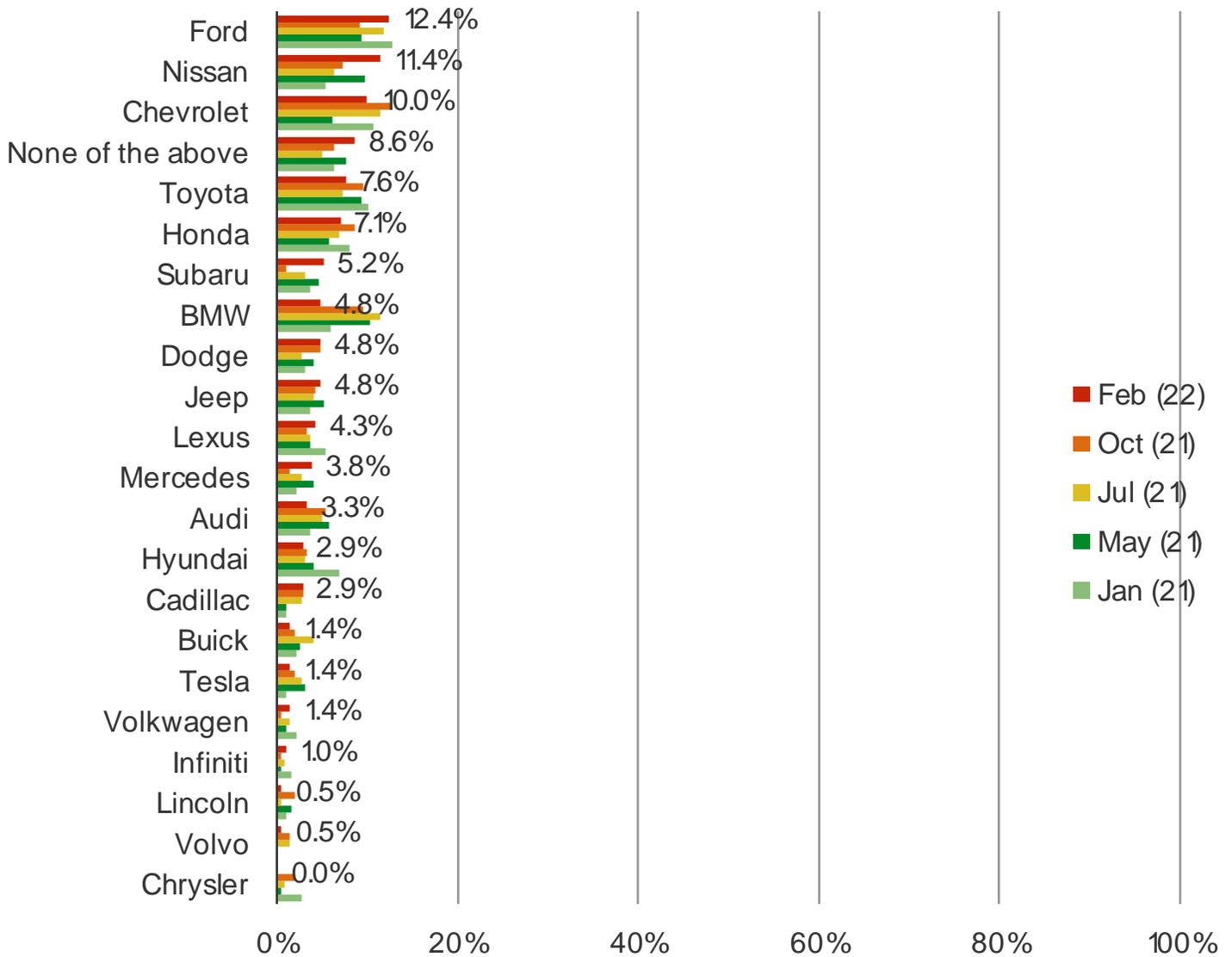
WHAT IS THE BRAND OF THE PRIMARY AUTOMOBILE THAT YOU DRIVE?

Posed to auto owners.



WHAT IS THE BRAND OF THE PRIMARY AUTOMOBILE THAT YOU DRIVE?

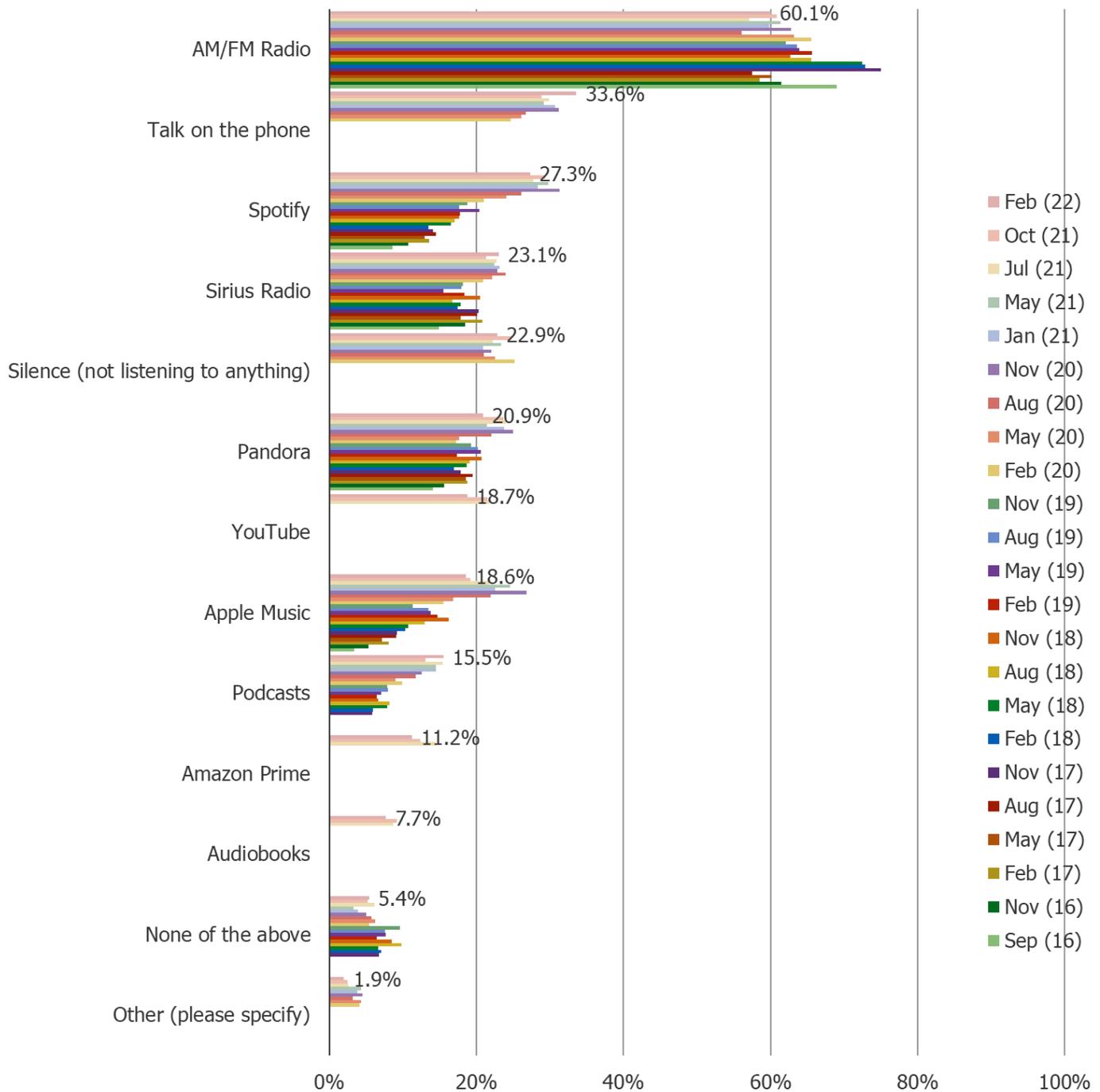
Posed to auto who pay for a Sirius account currently.



MARKET SHARE IN THE CAR

DO YOU REGULARLY OR OCCASIONALLY LISTEN TO THE FOLLOWING IN YOUR CAR? (SELECT ALL THAT APPLY)

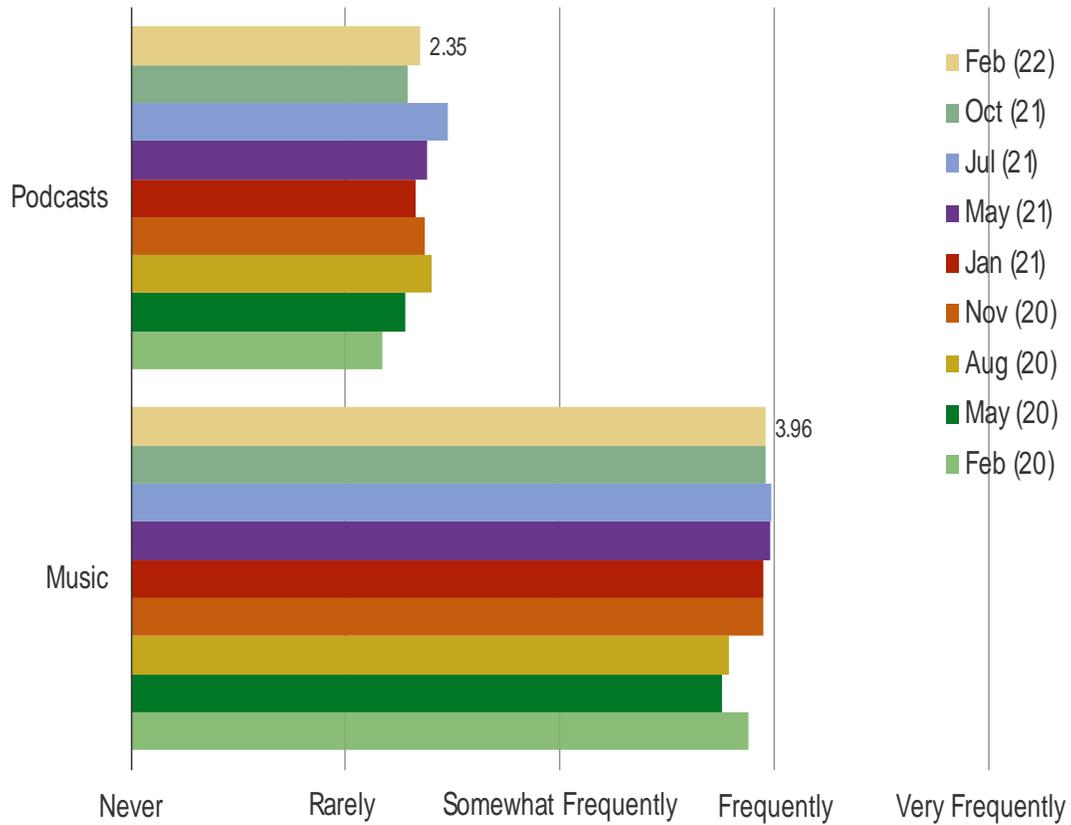
Posed to all respondents who own / lease a car



AIRPODS

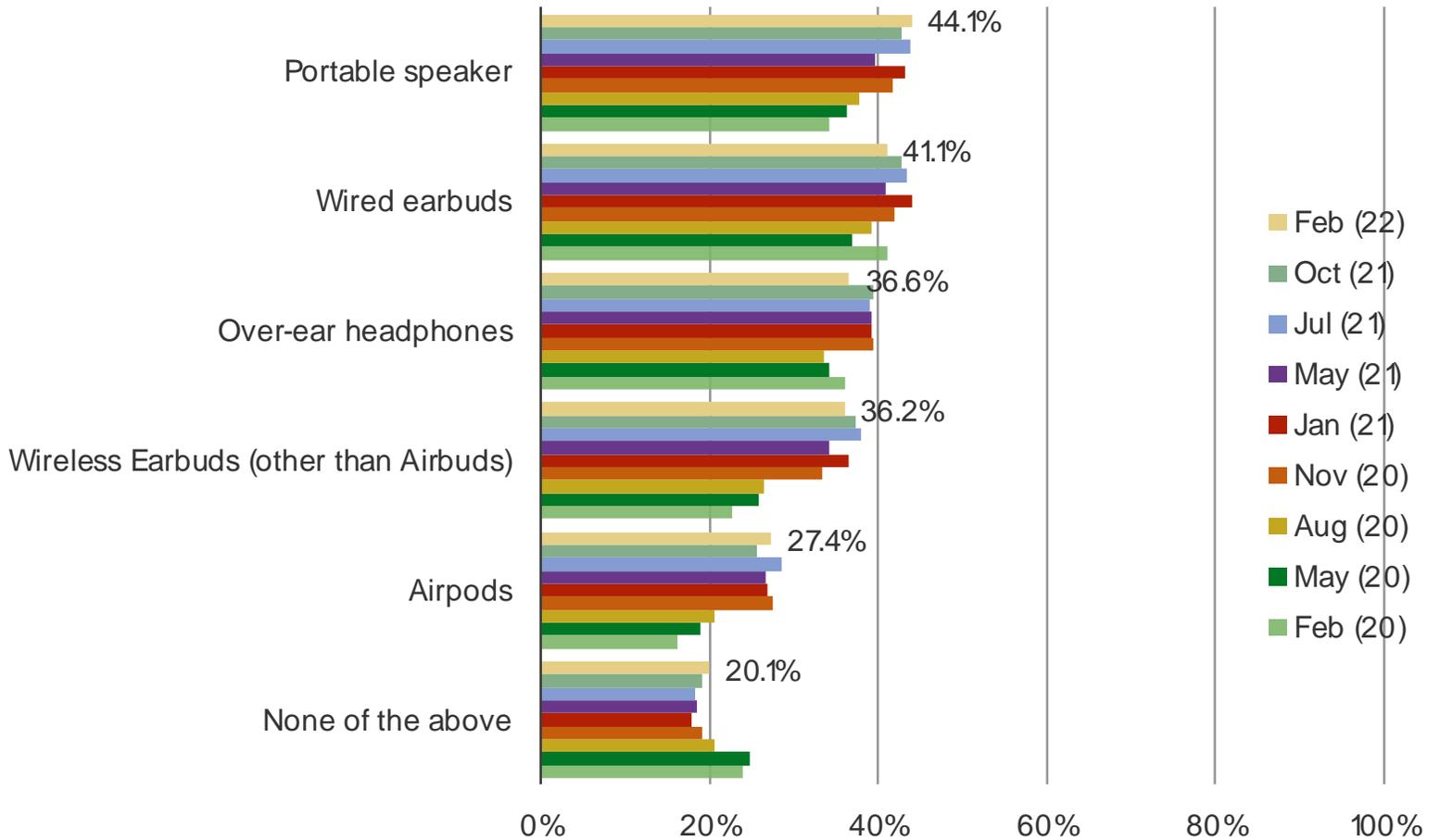
HOW OFTEN DO YOU LISTEN TO...

Posed to all respondents



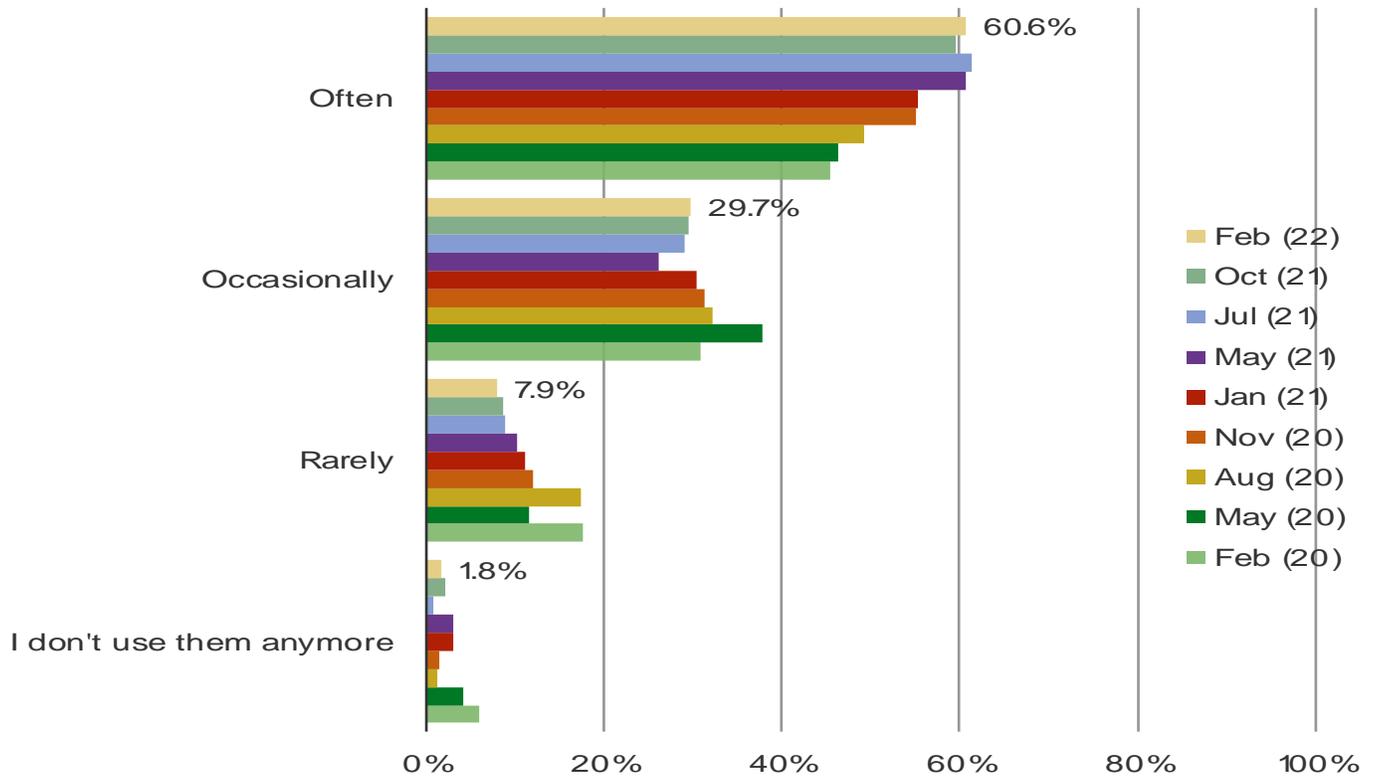
DO YOU OWN ANY OF THE FOLLOWING?

Posed to all respondents



HOW OFTEN DO YOU USE YOUR AIRPODS?

Posed to Airpod owners



DO YOU THINK YOUR USAGE OF AIRPODS MAKES YOU DO ANY OF THE FOLLOWING MORE OR LESS OFTEN THAN YOU DID BEFORE YOU GOT AIRPODS?

Posed to Airpod owners

