

KEY TAKEAWAYS:

SPOTIFY LISTENING MIX HAS SHIFTED FROM NEW TO CATALOGUE A BIT IN THE PAST FOUR MONTHS.

SPOTIFY SPOKEN WORD CONSUMPTION (PODCASTS, COMEDY, POETRY, ETC) HAS INCREASED IN THE PAST FOUR MONTHS.

PAID STREAMING AUDIO ACCOUNTS (ALL PROVIDERS) HAVE BEEN FLATTER OVER THE PAST YEAR (GROWTH WAS STRONGER IN PRIOR YEARS).

AM/FM HAS LOST SOME SHARE OF LISTENING TIME IN THE CAR SEQUENTIALLY.

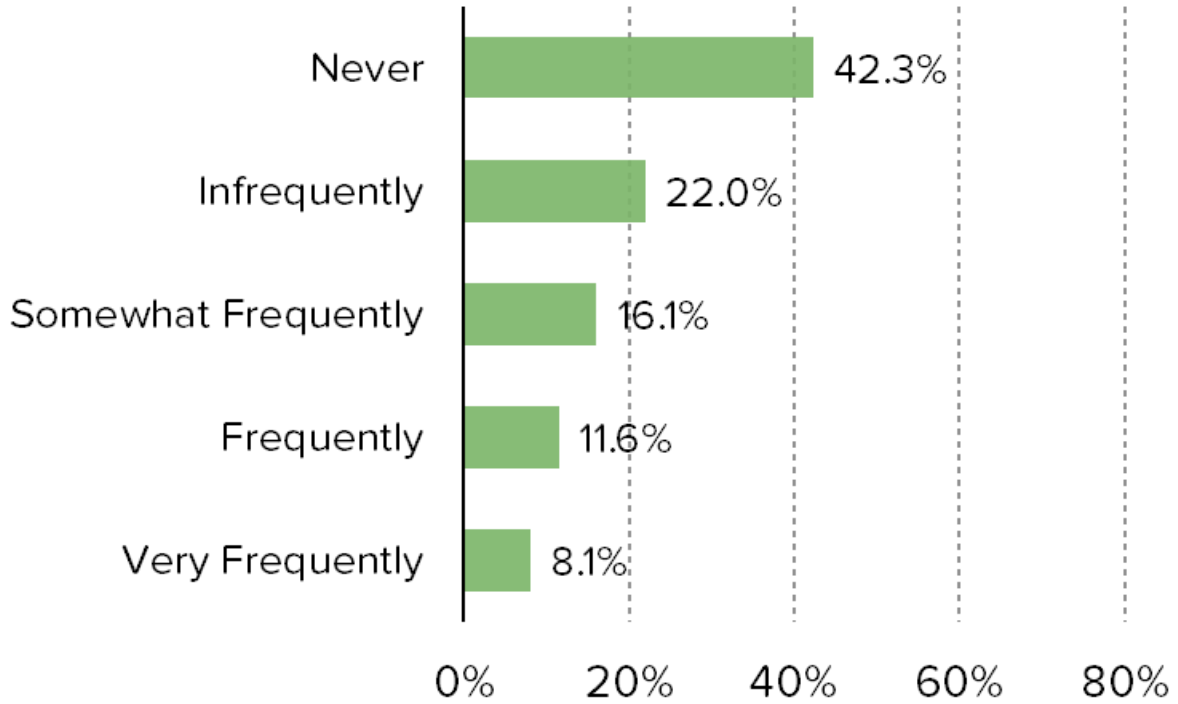
SPOTIFY HAS THE EDGE WHEN IT COMES TO MINDSHARE FOR PODCASTS, BUT APPLE ALSO PERFORMS WELL.

THE CONNECTED CAR CONTINUES TO IMPACT SIRIUS XM DECISIONS, BUT THE IMPACTS HAVE LESSENERED IN RECENT QUARTERS.

NEW QUESTIONS THIS QUARTER: SCOPING PODCASTS

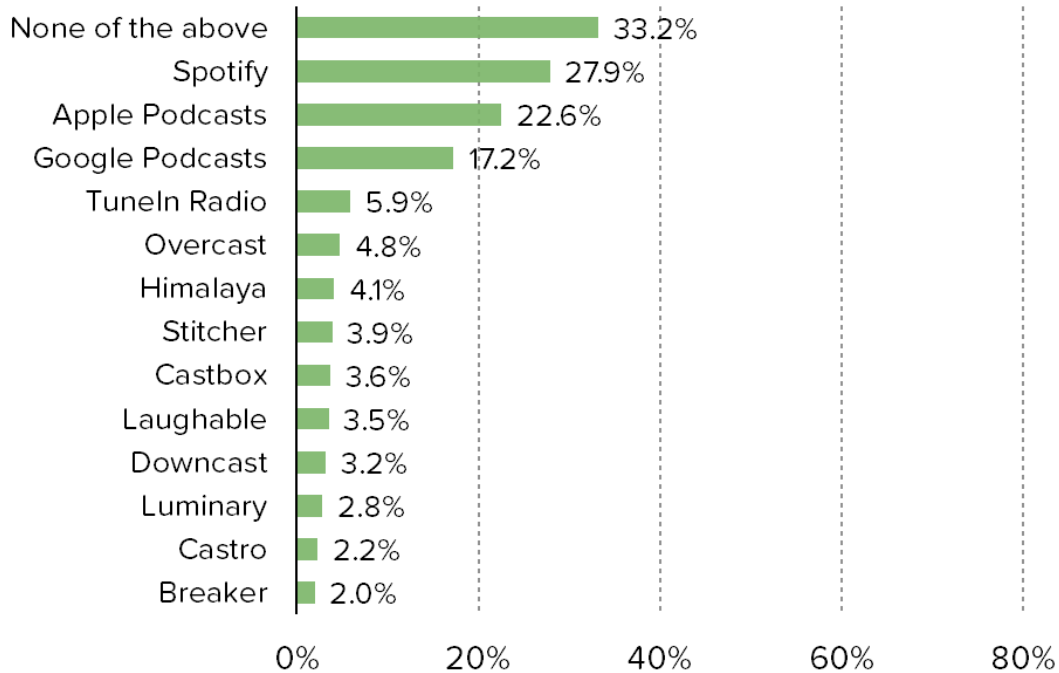
HOW OFTEN DO YOU LISTEN TO PODCASTS?

Posed to all respondents

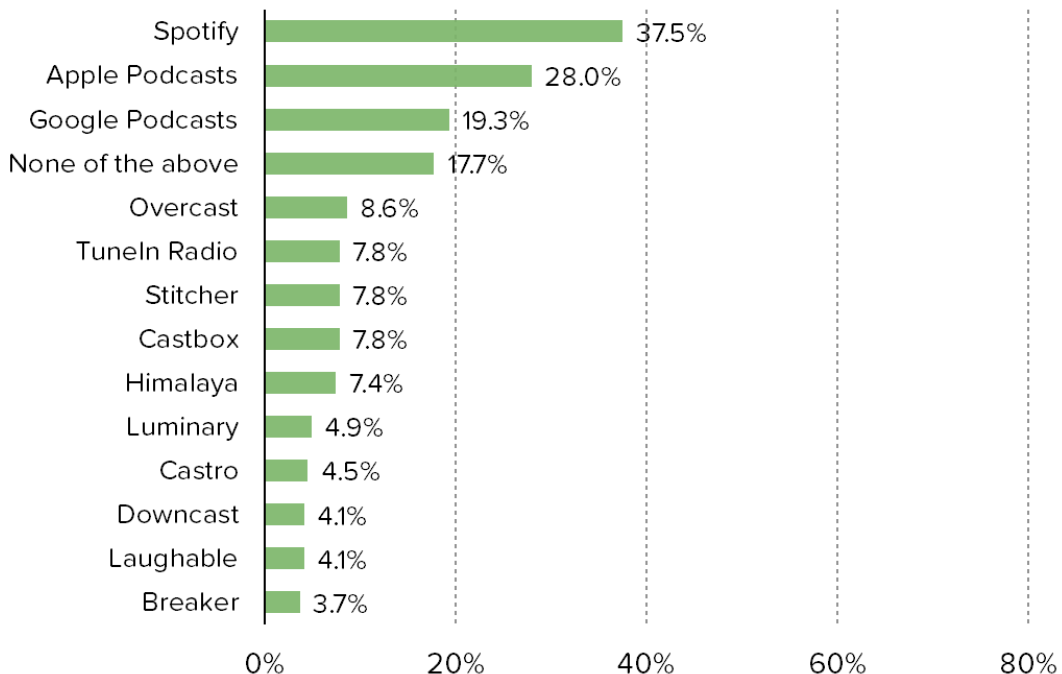


WHICH OF THE FOLLOWING PLATFORMS DO YOU USE TO LISTEN TO PODCASTS?

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

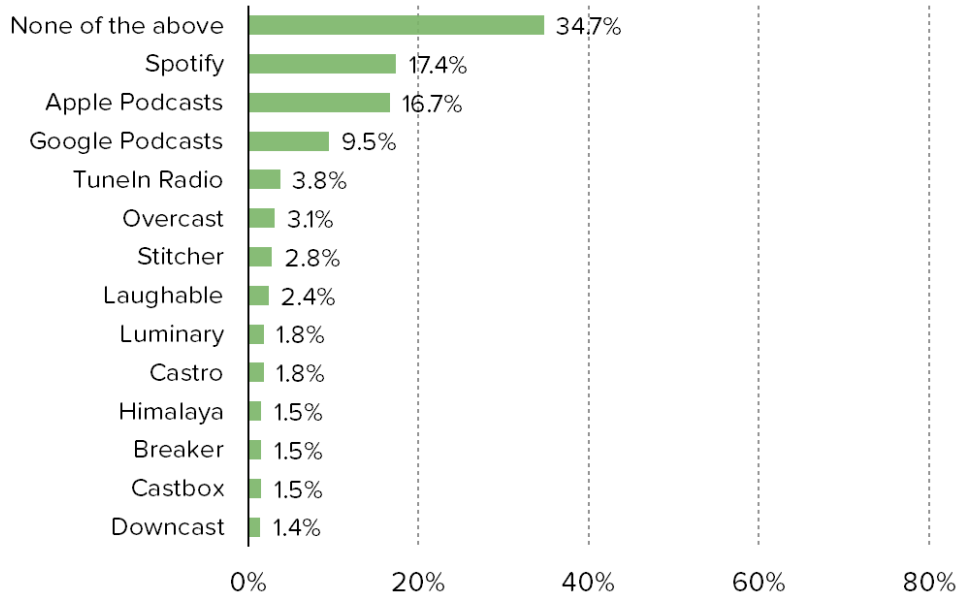


Posed to respondents who listen to podcasts **FREQUENTLY OR VERY FREQUENTLY**

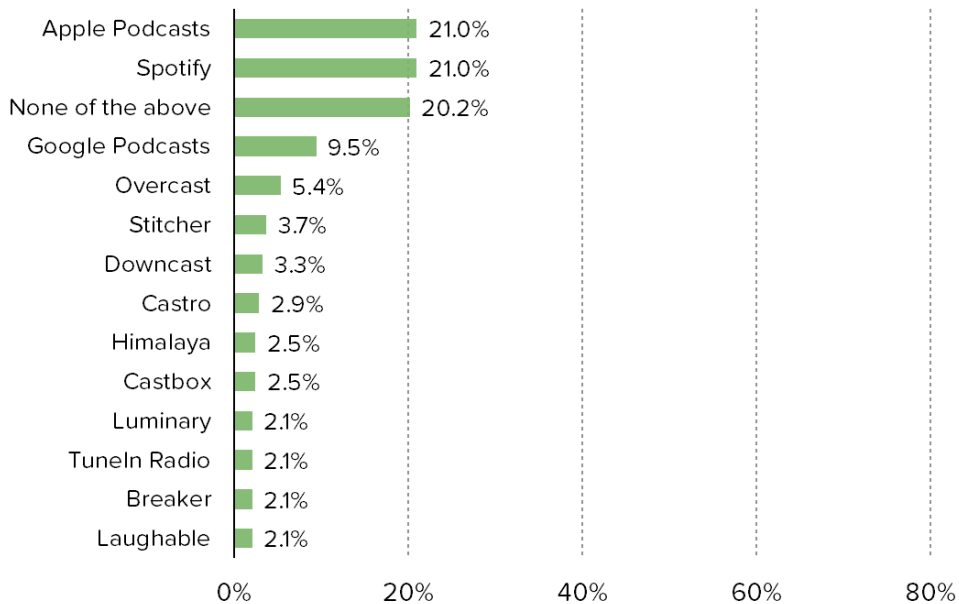


WHICH OF THE FOLLOWING HAS THE MOST UNIQUE PODCAST CONTENT THAT YOU CANNOT FIND ON OTHER PLATFORMS?

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



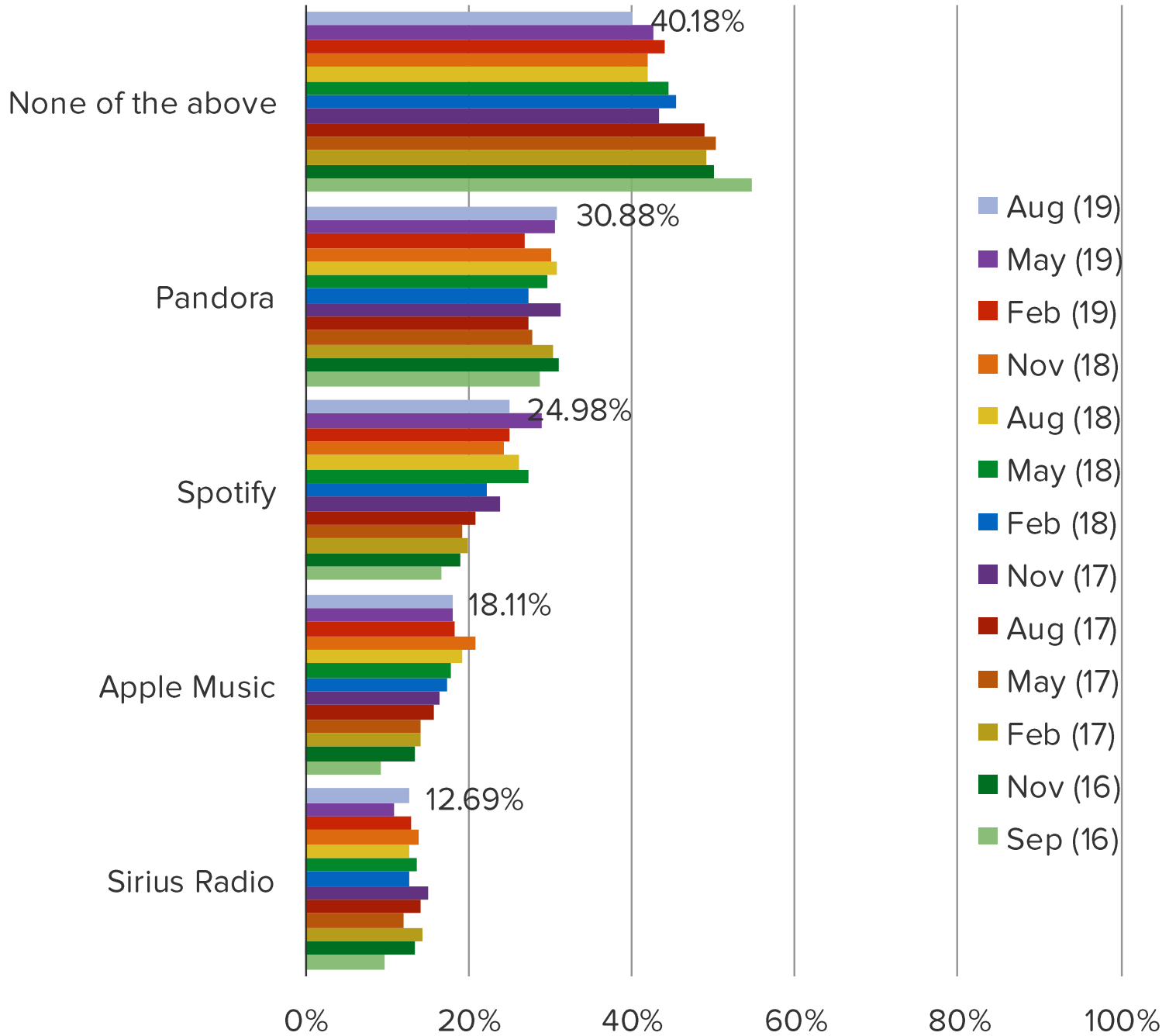
Posed to respondents who listen to podcasts **FREQUENTLY OR VERY FREQUENTLY**



MARKET SHARE OVERALL

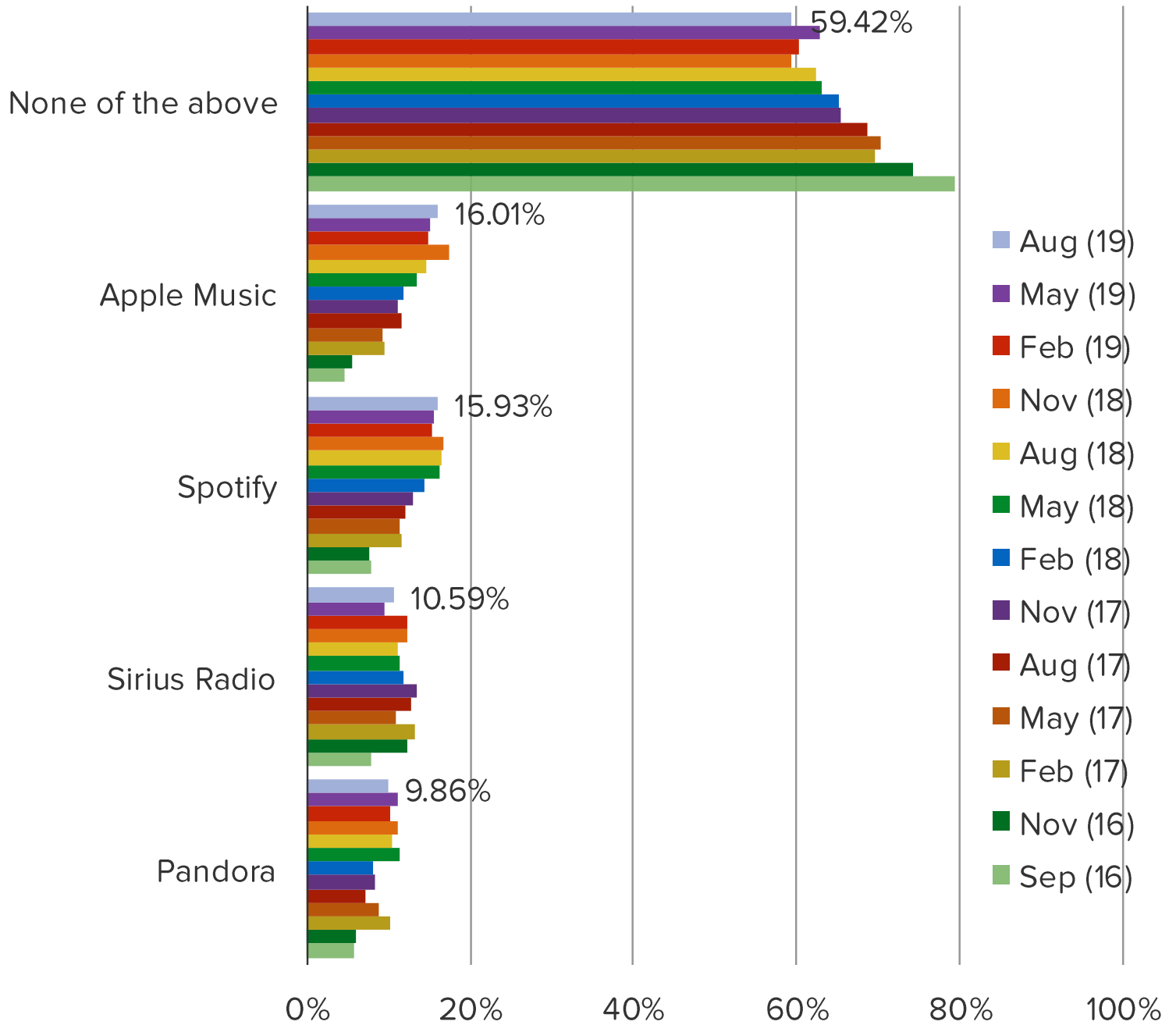
CURRENTLY HAS AN ACCOUNT

Posed to all respondents



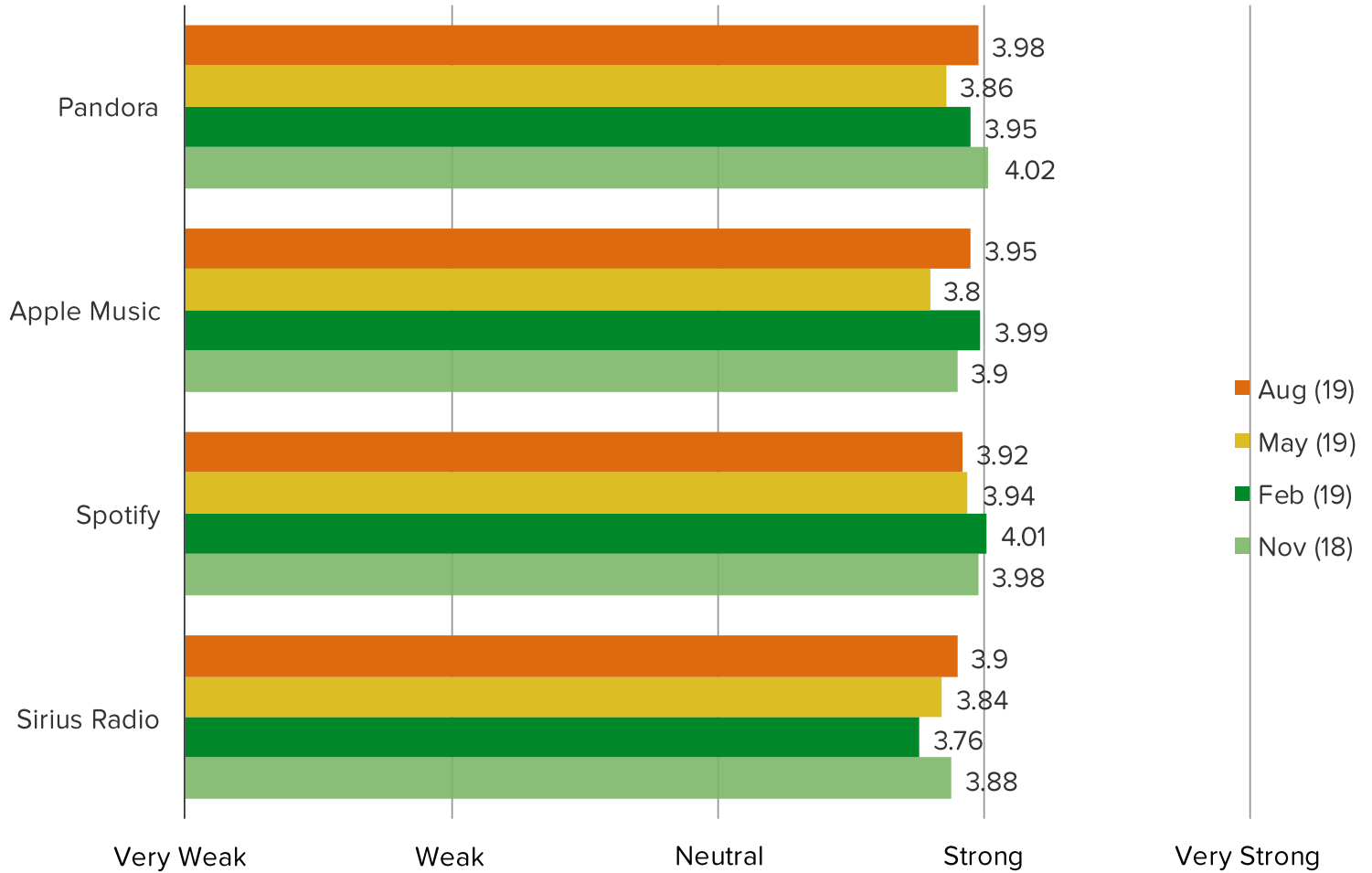
CURRENTLY PAYING FOR ACCOUNT

Posed to all respondents



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

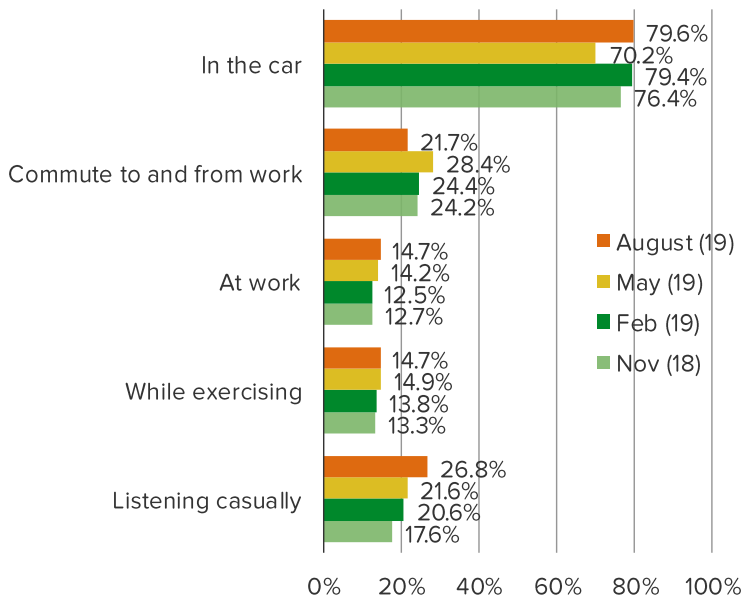
Respondents who pay for each platform



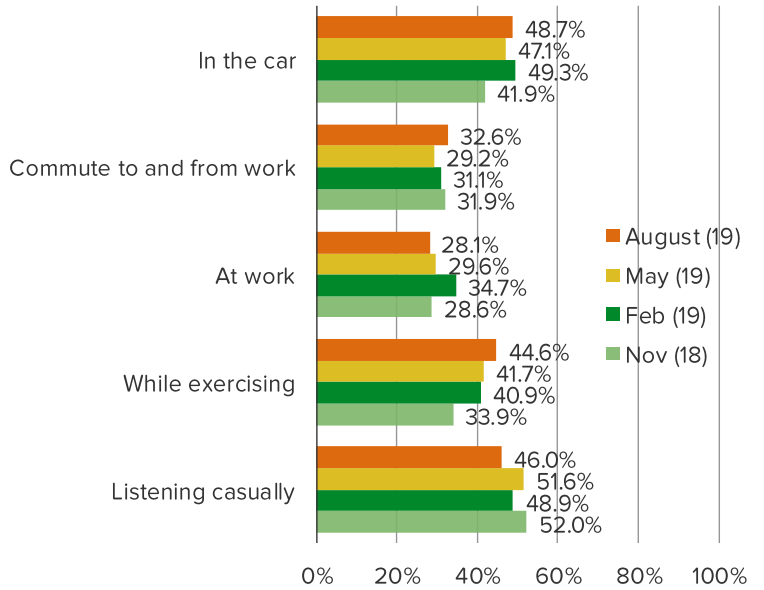
WHERE DO YOU TYPICALLY LISTEN TO THIS PLATFORM? (SELECT ALL THAT APPLY)

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

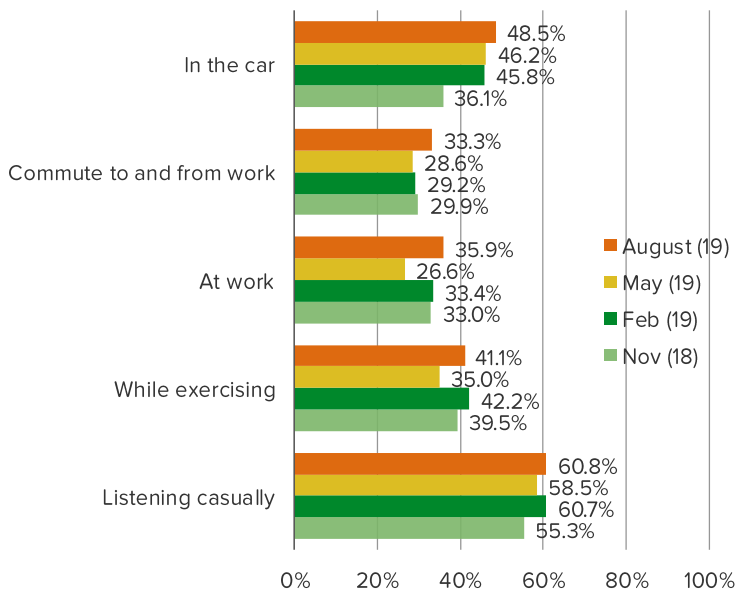
SIRIUS XM



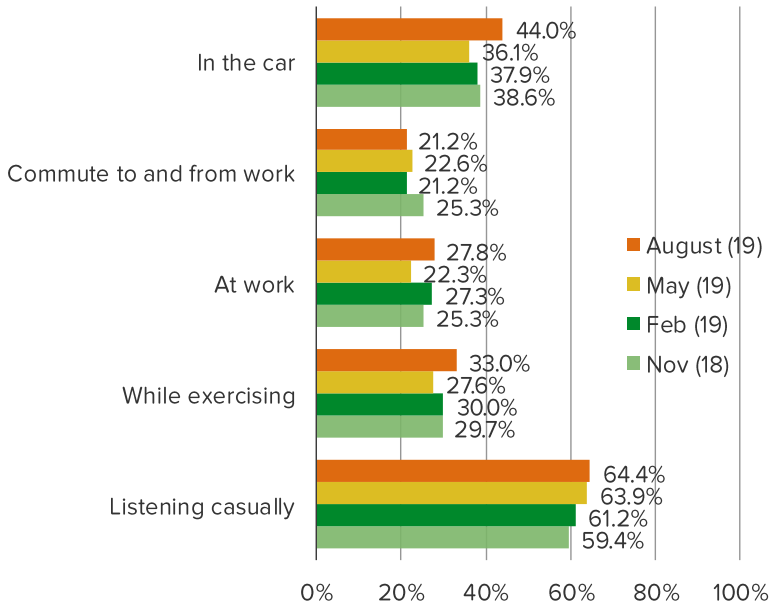
APPLE MUSIC



SPOTIFY



PANDORA



WHAT ABOUT THIS PLATFORM DO YOU VALUE THE MOST?

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

FEBRUARY 2019

SIRIUS XM



APPLE MUSIC



SPOTIFY



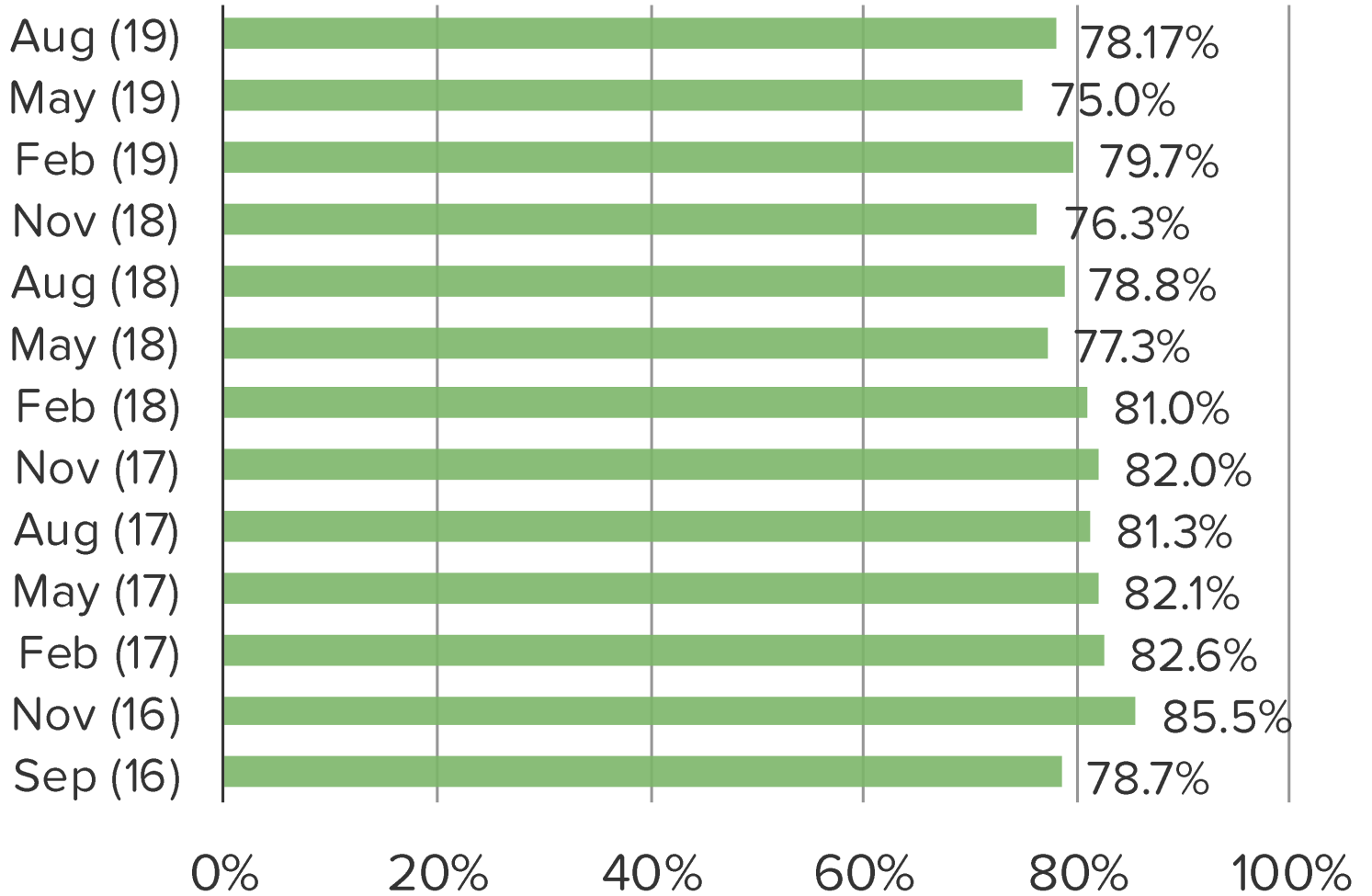
PANDORA



CONNECTED CAR

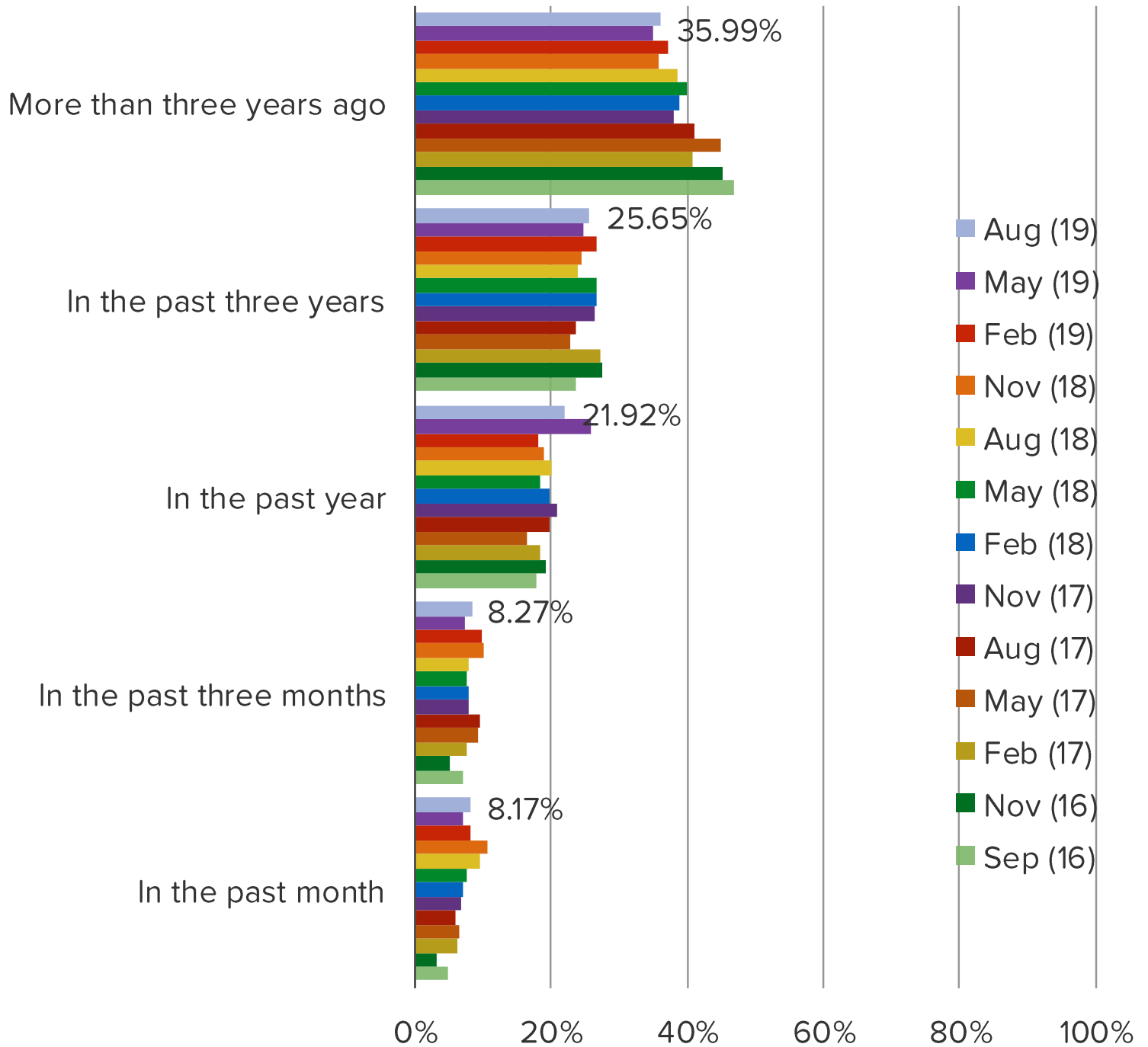
OWNS OR LEASES A CAR

Posed to all respondents



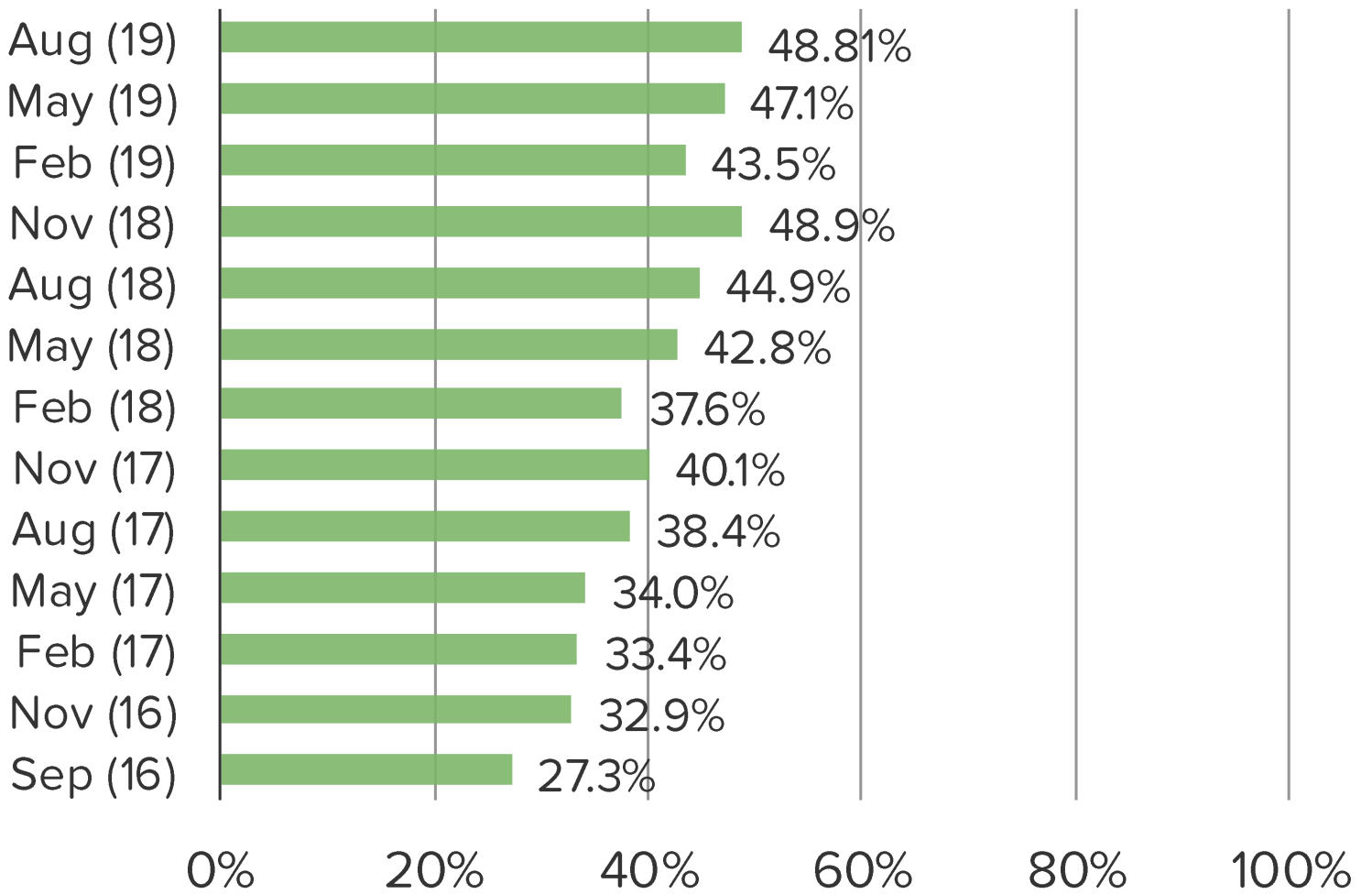
WHEN IS THE LAST TIME YOU LEASED OR BOUGHT A CAR?

Posed to all respondents who own / lease a car



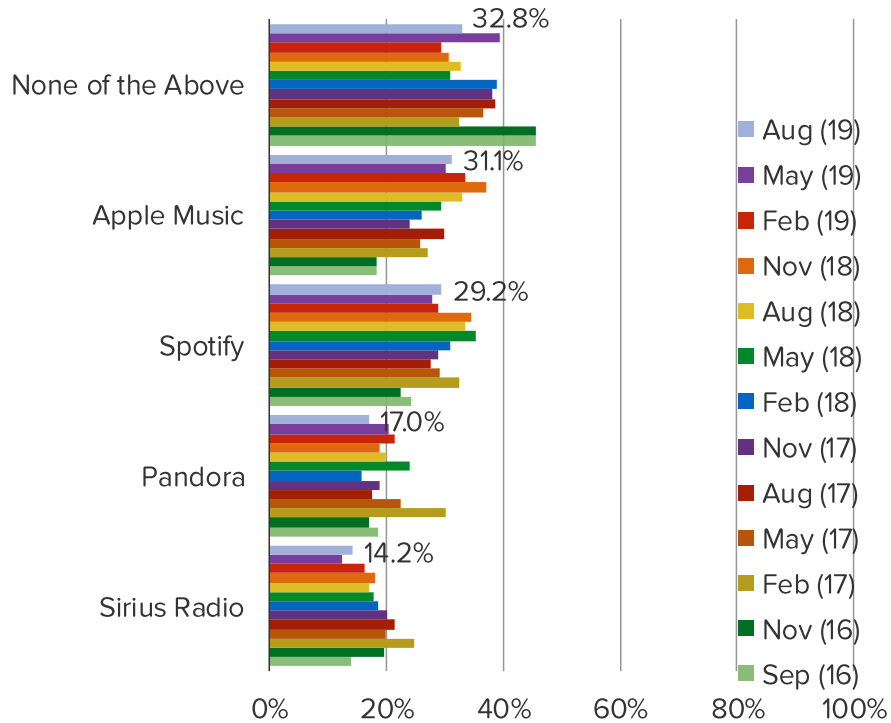
DO YOU EVER CONNECT A SMARTPHONE TO LISTEN TO MUSIC APPS IN YOUR CAR LIKE SPOTIFY, PANDORA, APPLE MUSIC, ETC?

Posed to all respondents who own / lease a car

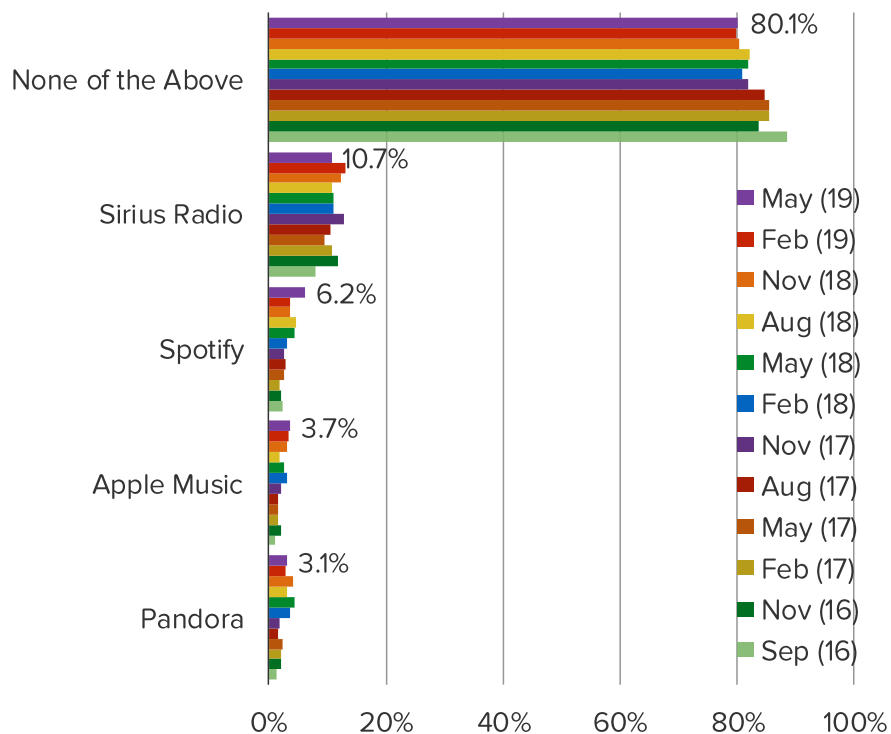


CURRENTLY PAYING FOR ACCOUNT (CROSS-TAB BY IF THEY CONNECT MUSIC APPS TO THE CAR)

Respondents who have a car and connect apps to the car

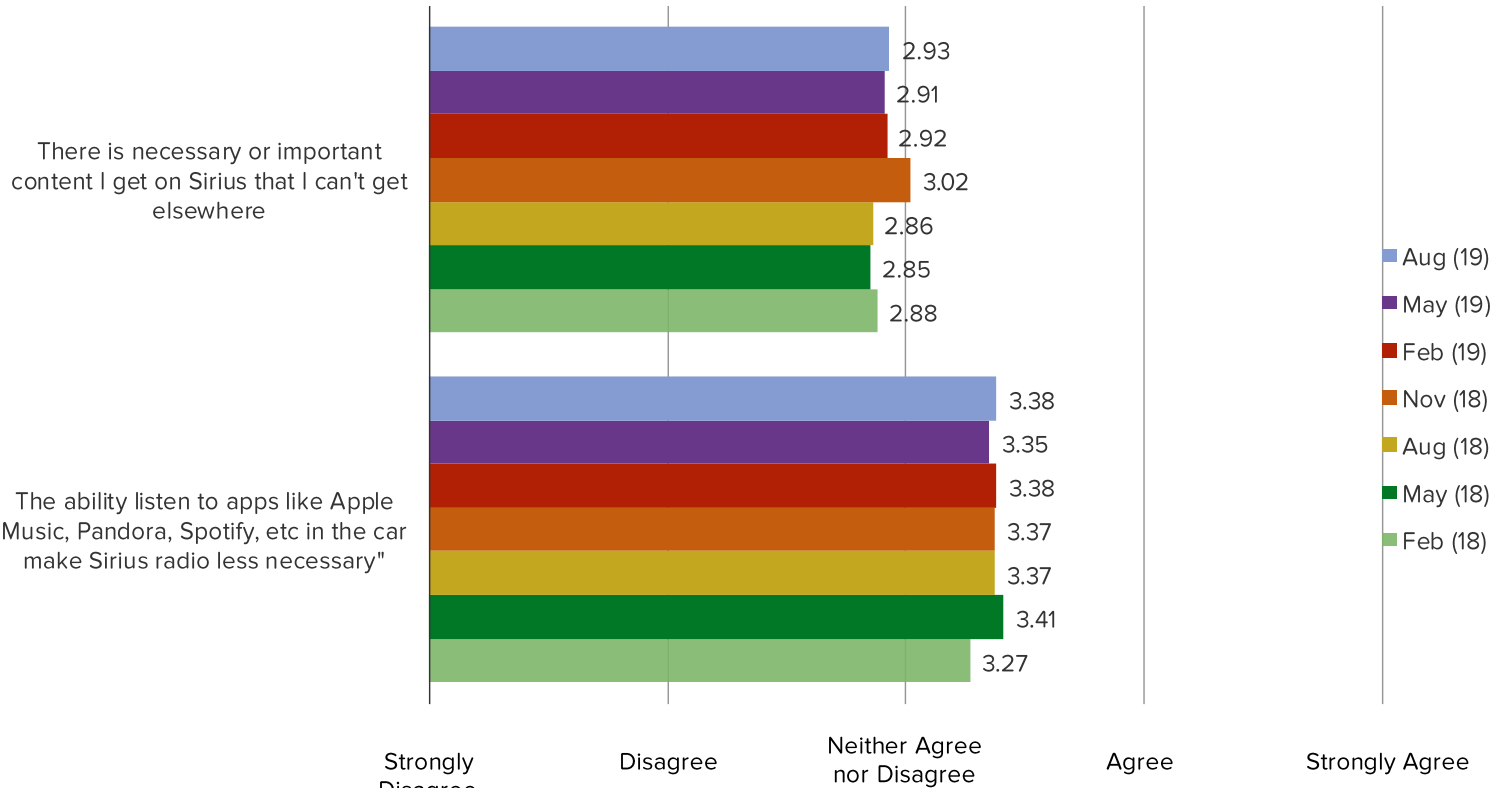


Respondents who have a car and DO NOT connect apps to the car



HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS:

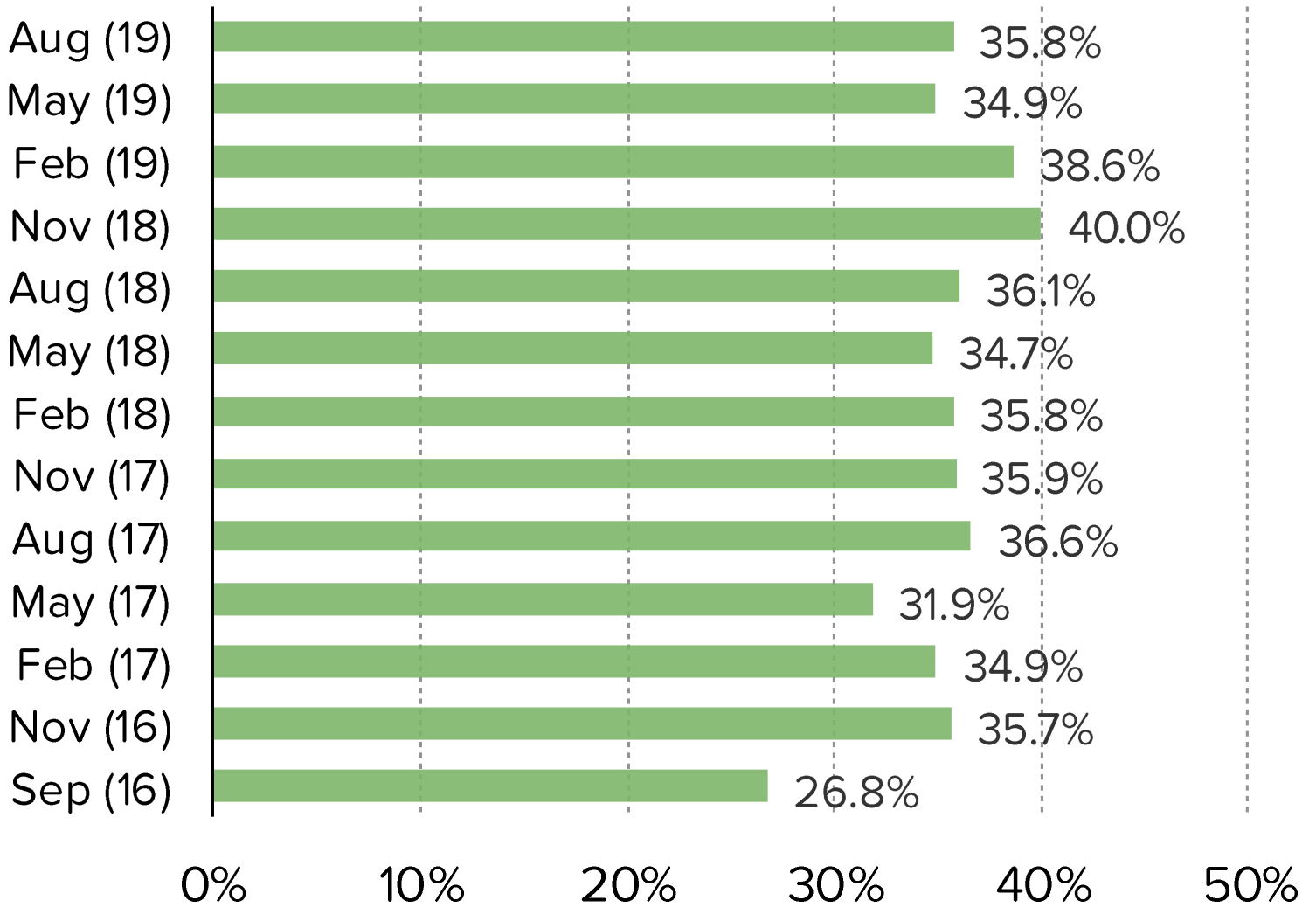
Posed to all respondents who own / lease a car



IMPACT OF CONNECTED CAR ON SIRIUS TRIALS

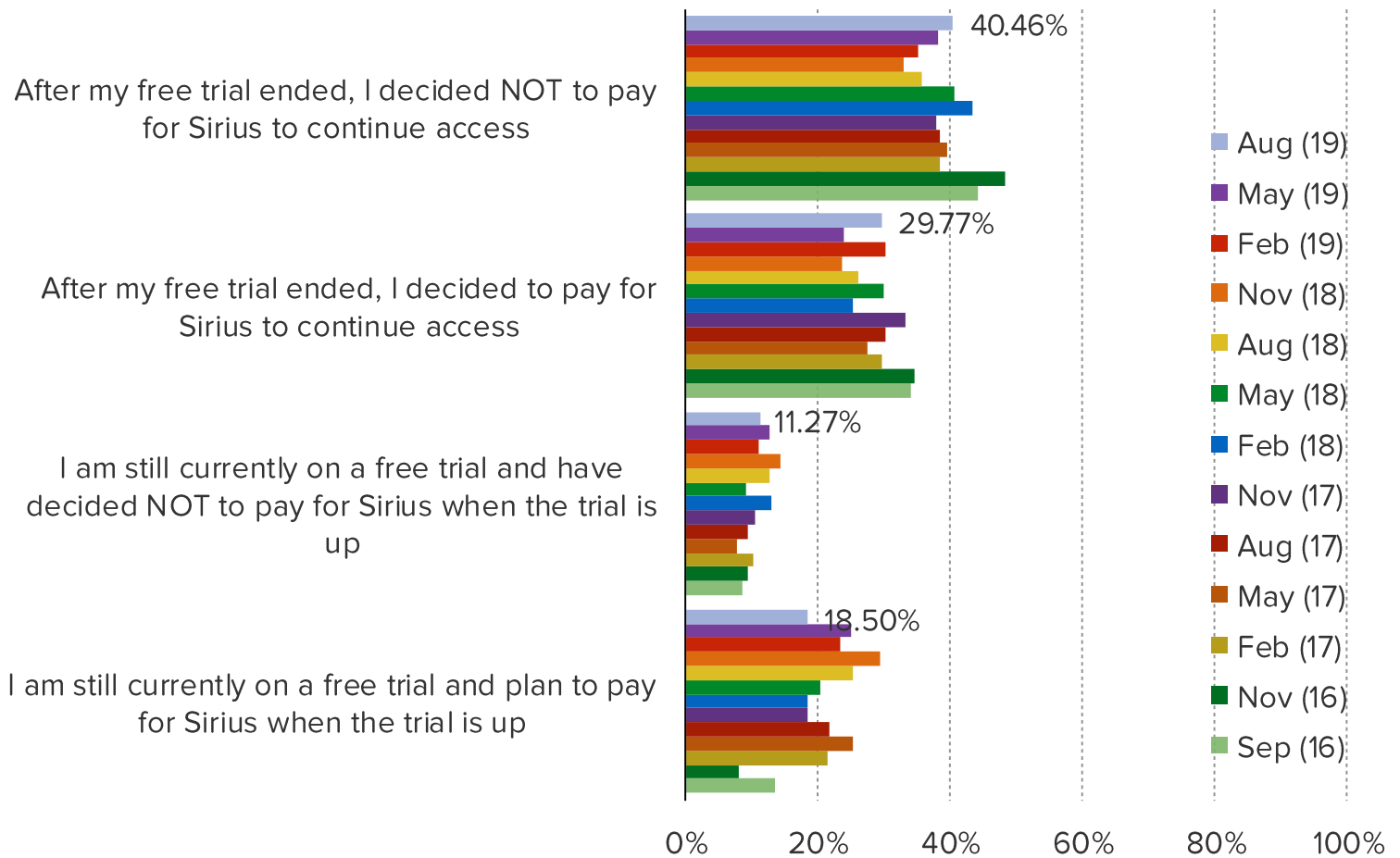
WHEN YOU MOST RECENTLY LEASED OR BOUGHT A CAR, DID IT COME WITH A FREE TRIAL TO SIRIUS RADIO?

Posed to all respondents who own / lease a car



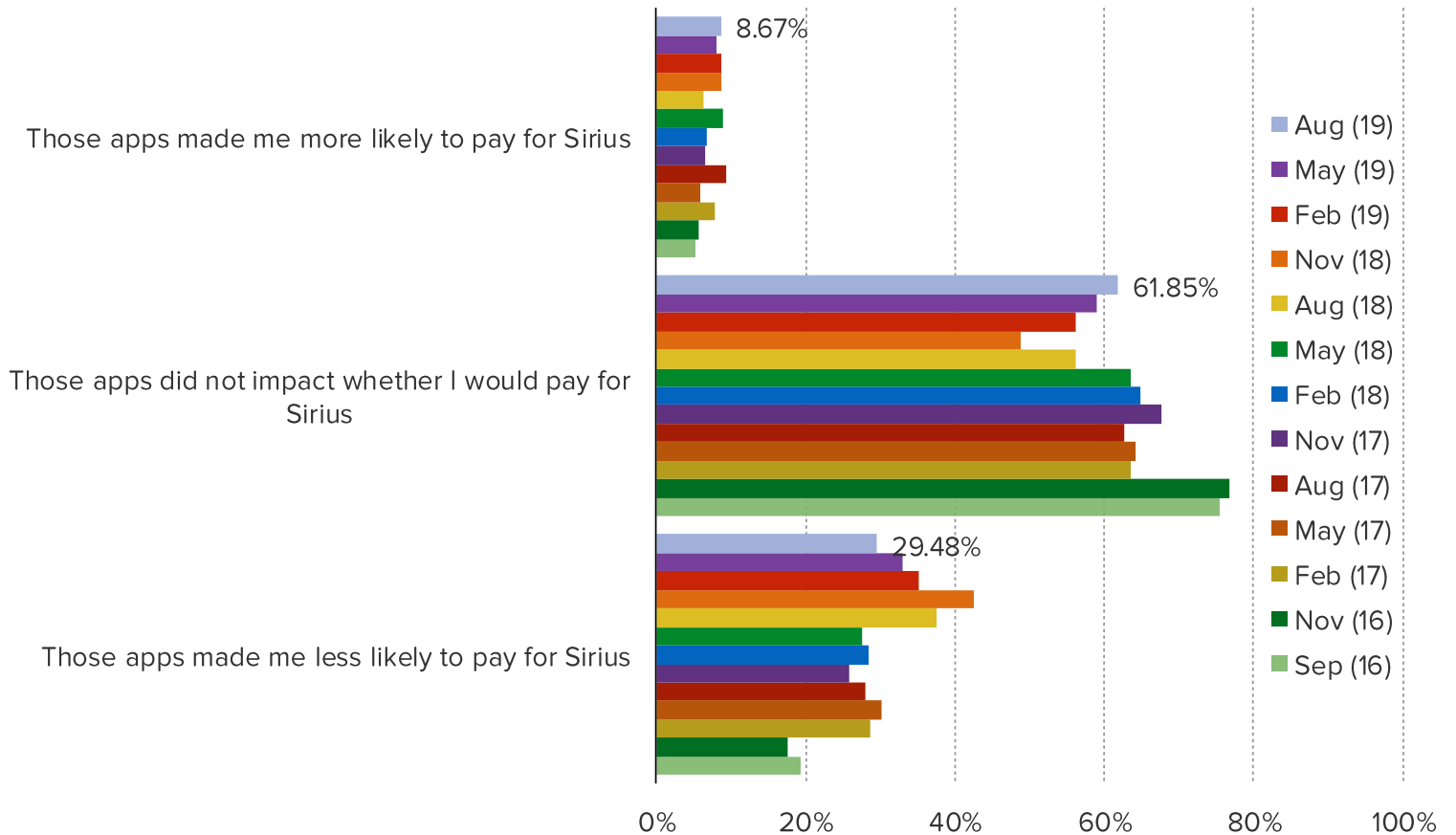
WHEN THE FREE TRIAL WAS UP, WHAT DID YOU DO?

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?

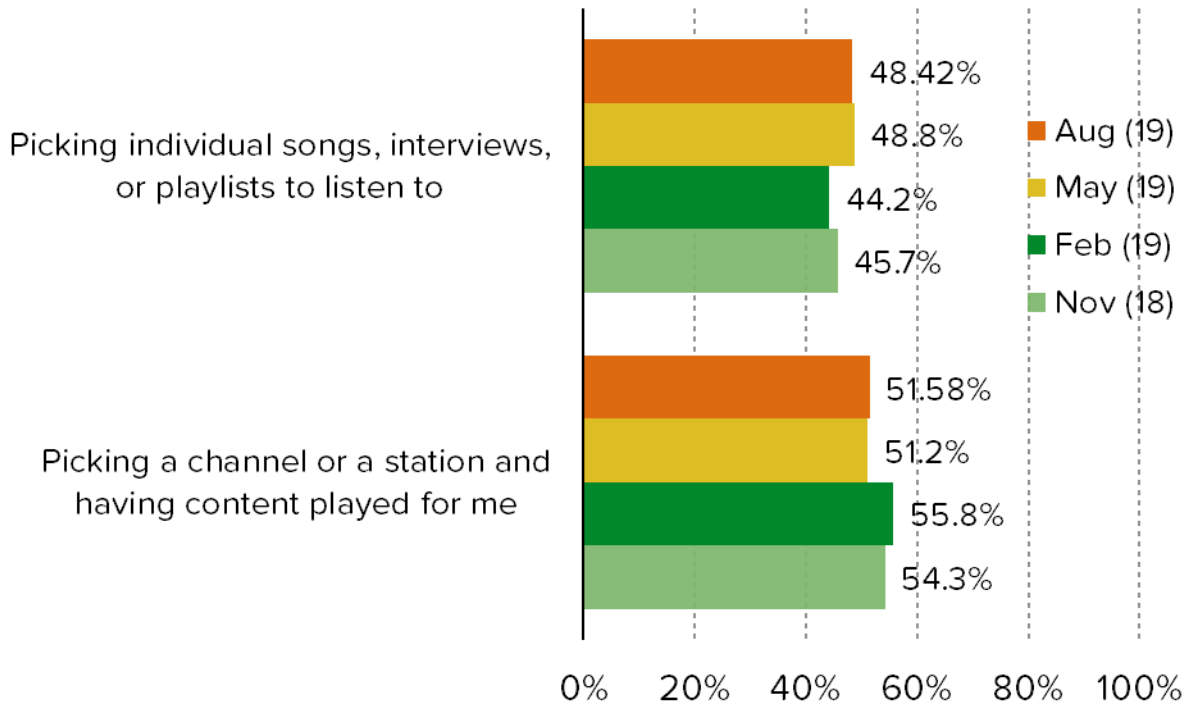
POSED TO RESPONDENTS WHO HAD/HAVE A FREE TRIAL WHEN THEY MOST RECENTLY GOT A NEW CAR



SENTIMENT

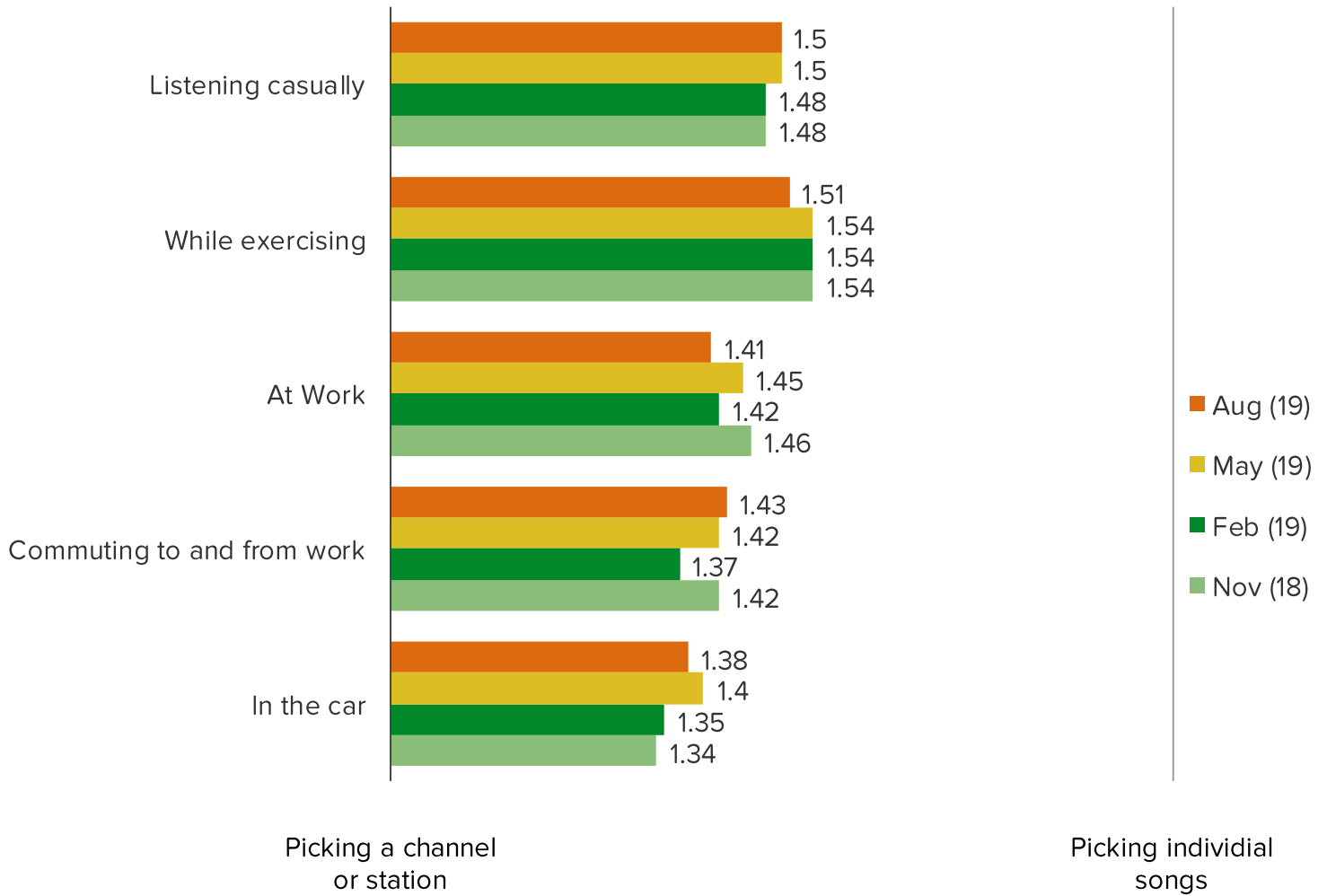
FOR LISTENING TO MUSIC AND TALK-SHOW CONTENT, WHICH IS BETTER?

Posed to all respondents.



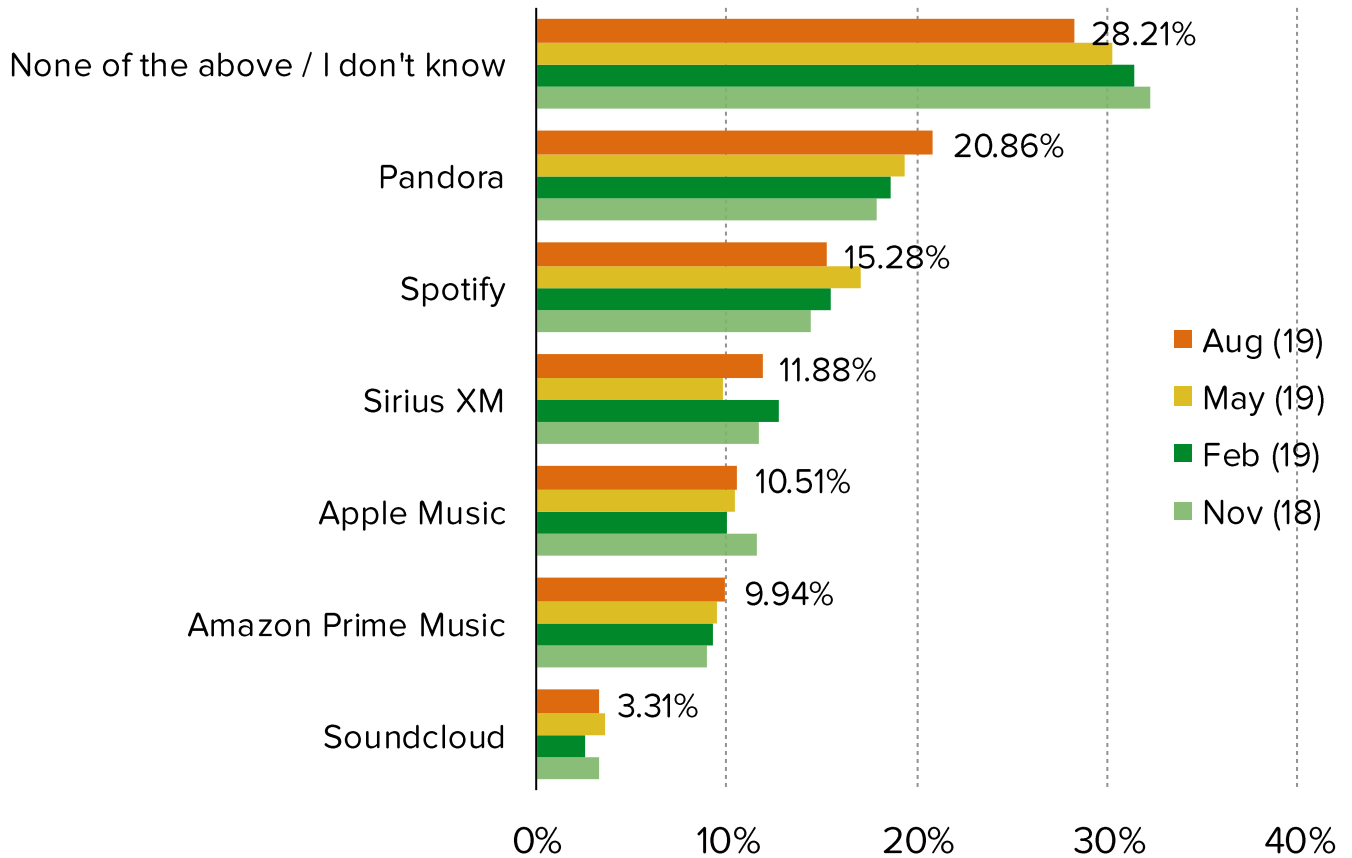
WHICH IS BETTER WHILE LISTENING TO MUSIC AND/OR TALK SHOW CONTENT WHILE DOING THE FOLLOWING?

Posed to all respondents.



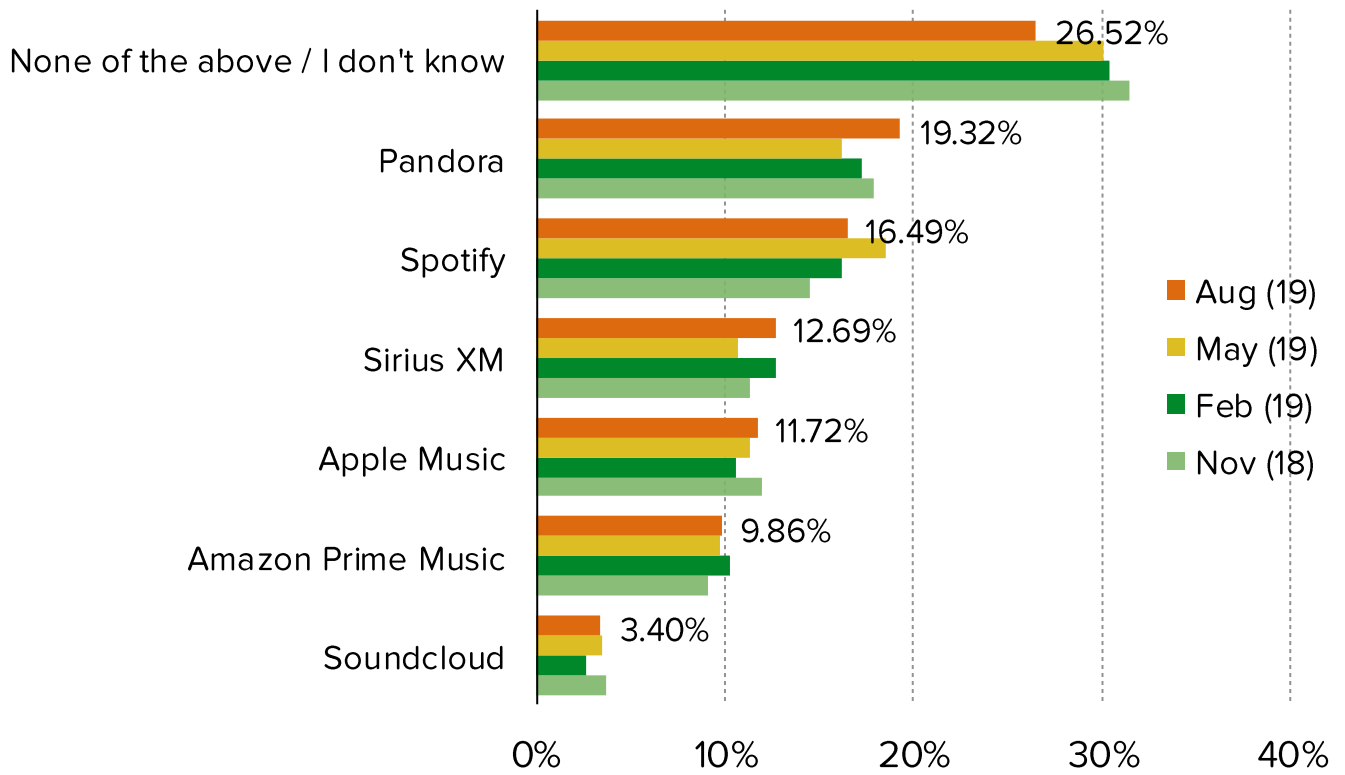
IN YOUR OPINION, WHICH PLATFORM IS BEST WHEN IT COMES TO THE WAY IN WHICH THEY DELIVER CONTENT TO ITS USERS? (IE. THE BEST USER EXPERIENCE)

Posed to all respondents.



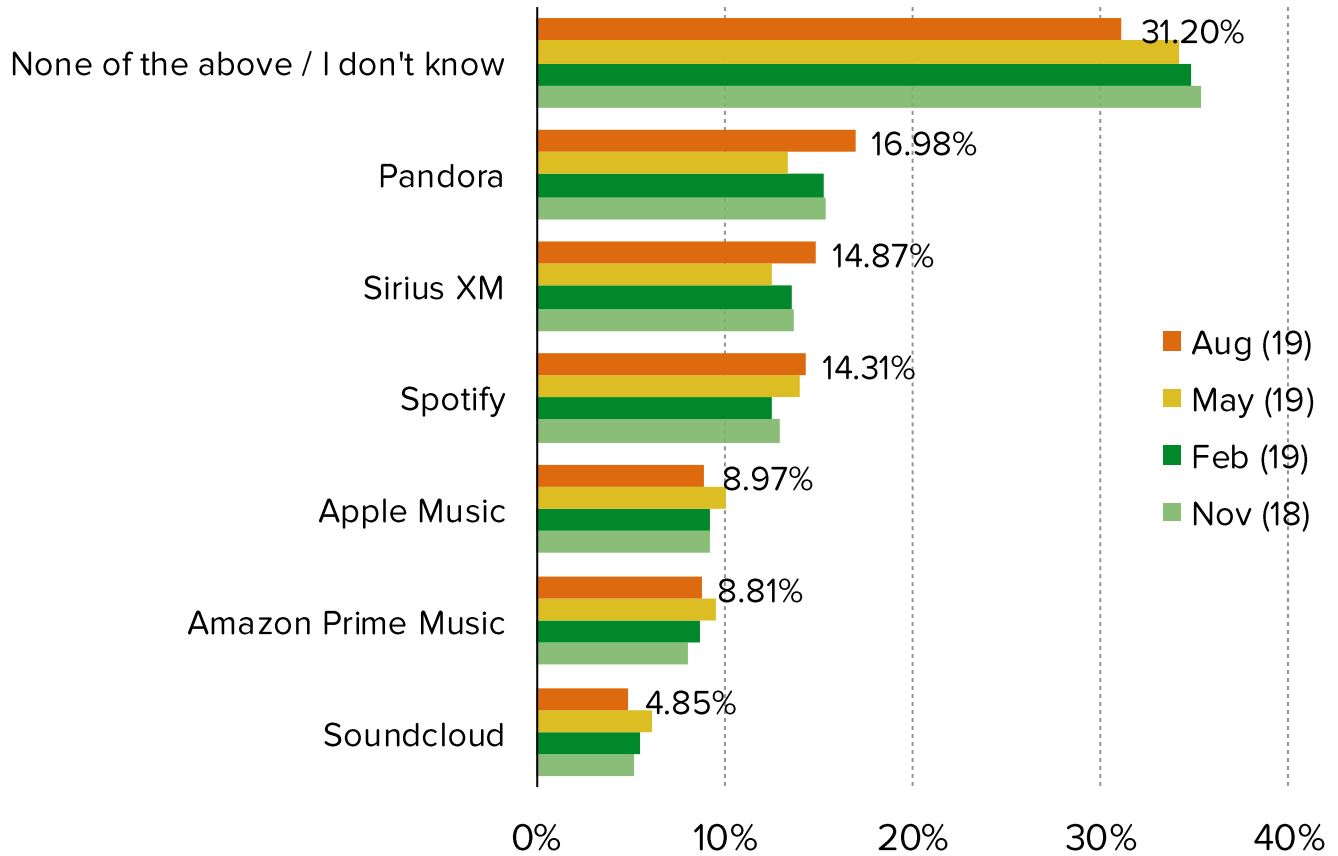
IN YOUR OPINION, WHICH PLATFORM HAS THE BEST CONTENT AVAILABLE

Posed to all respondents.



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

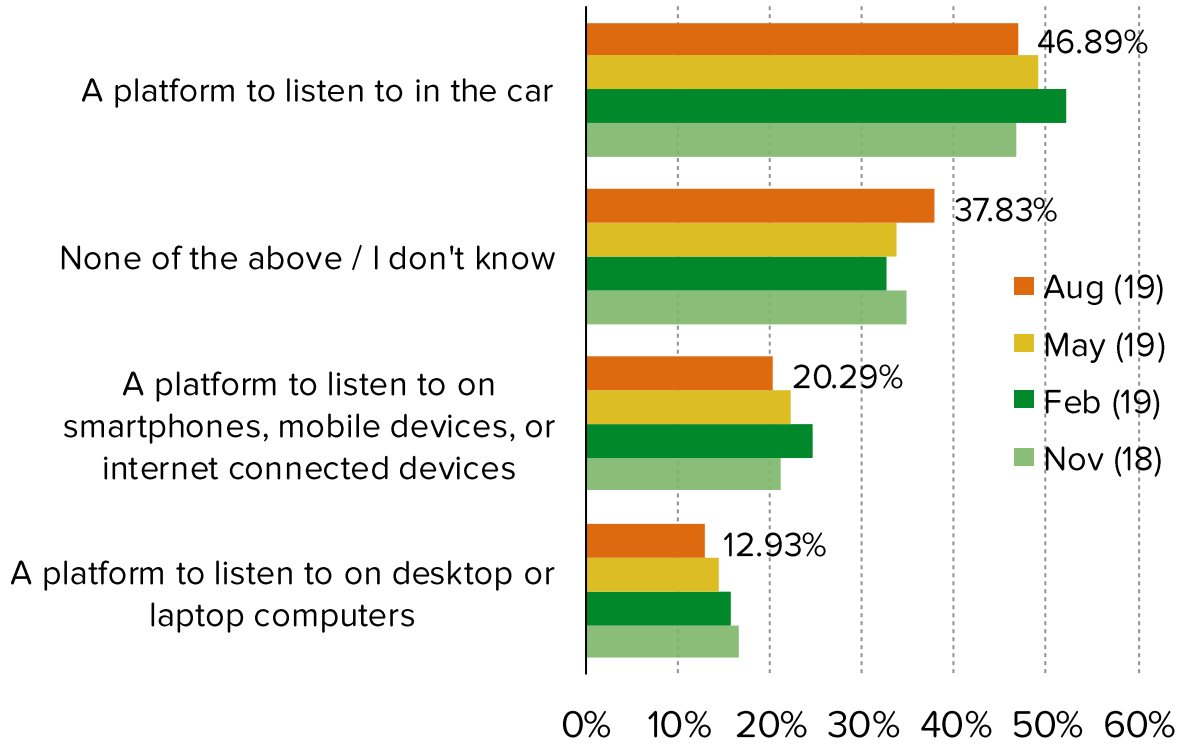
Posed to all respondents.



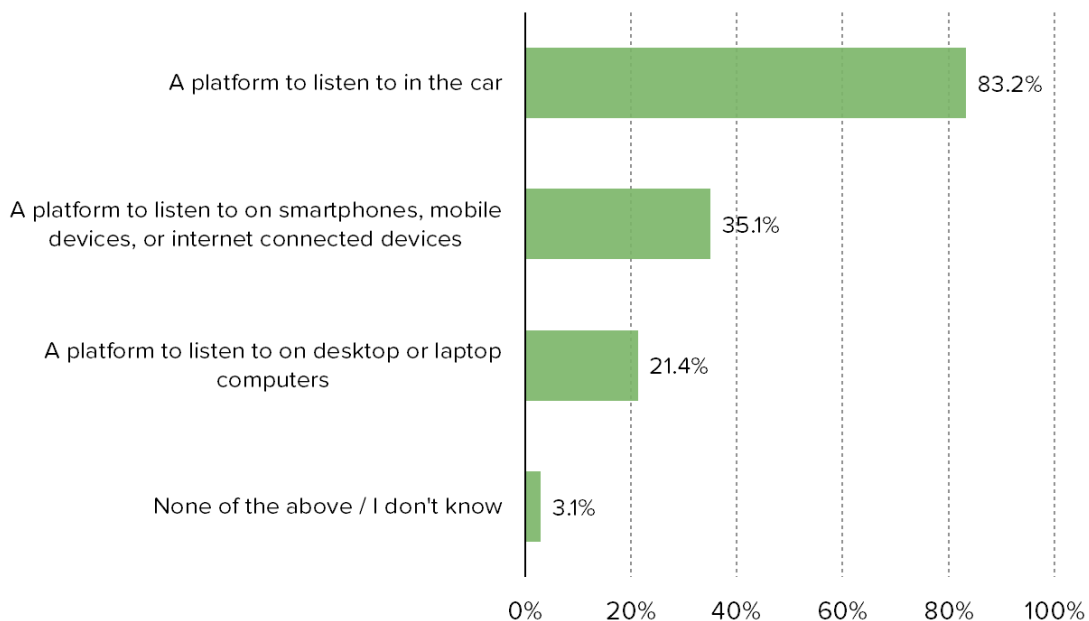
SIRIUS XM

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

Posed to all respondents.

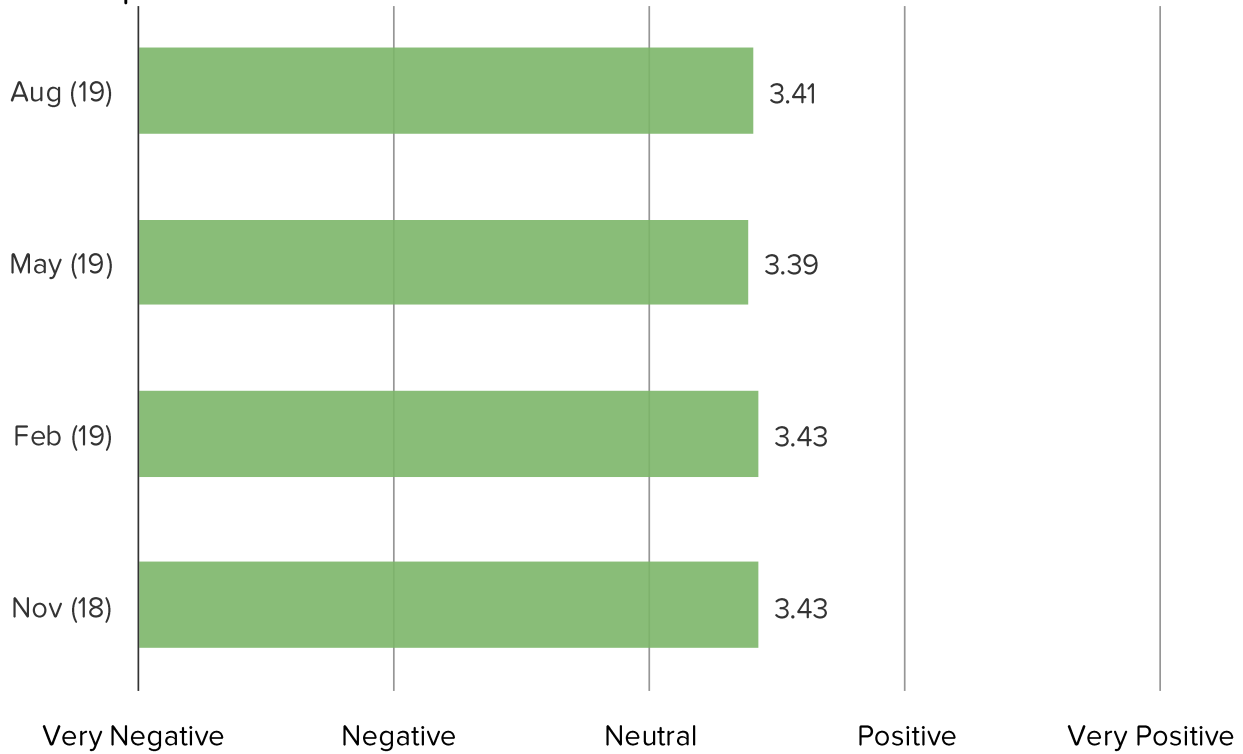


Posed to paying Sirius subscribers.

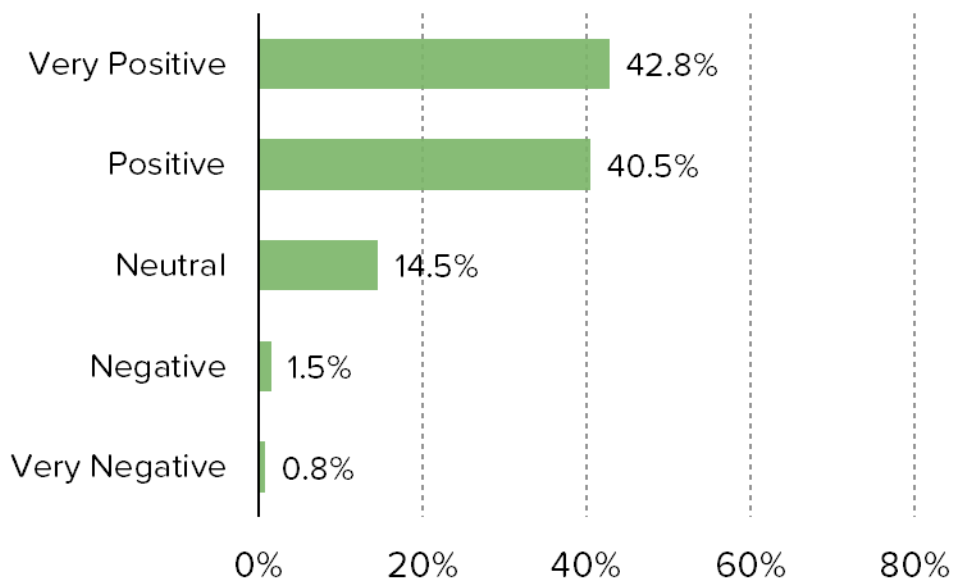


WHAT IS YOUR PERCEPTION OF SIRIUS XM?

Posed to all respondents.

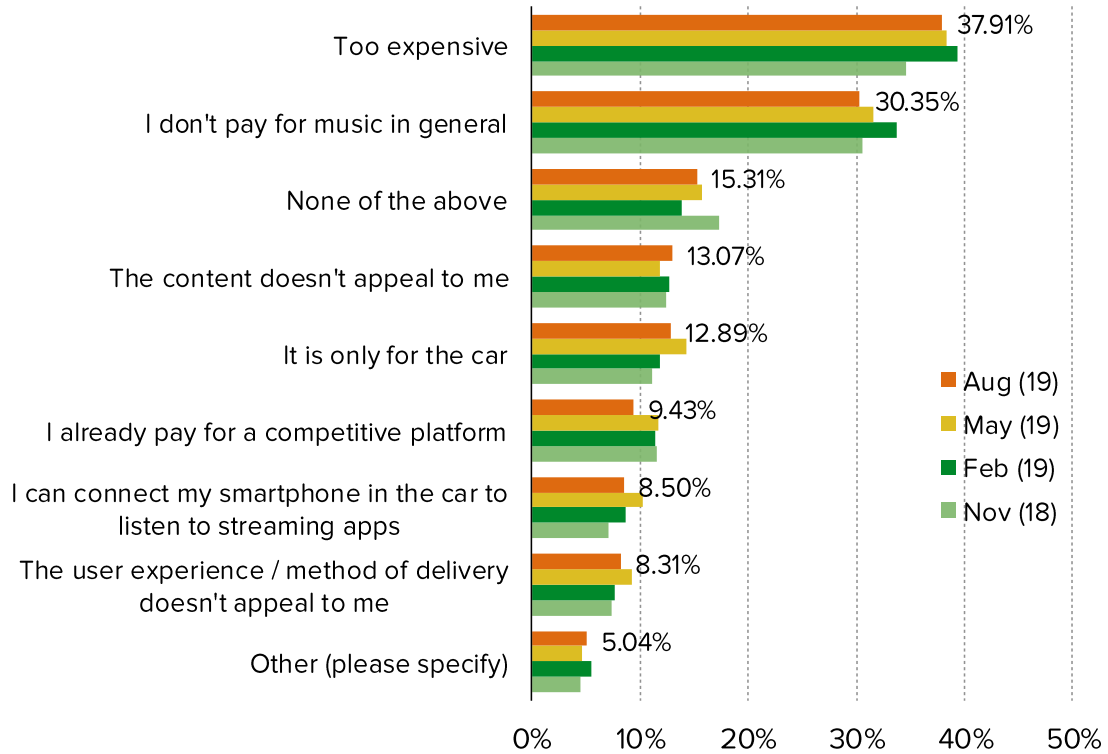


Posed to paying Sirius subscribers.



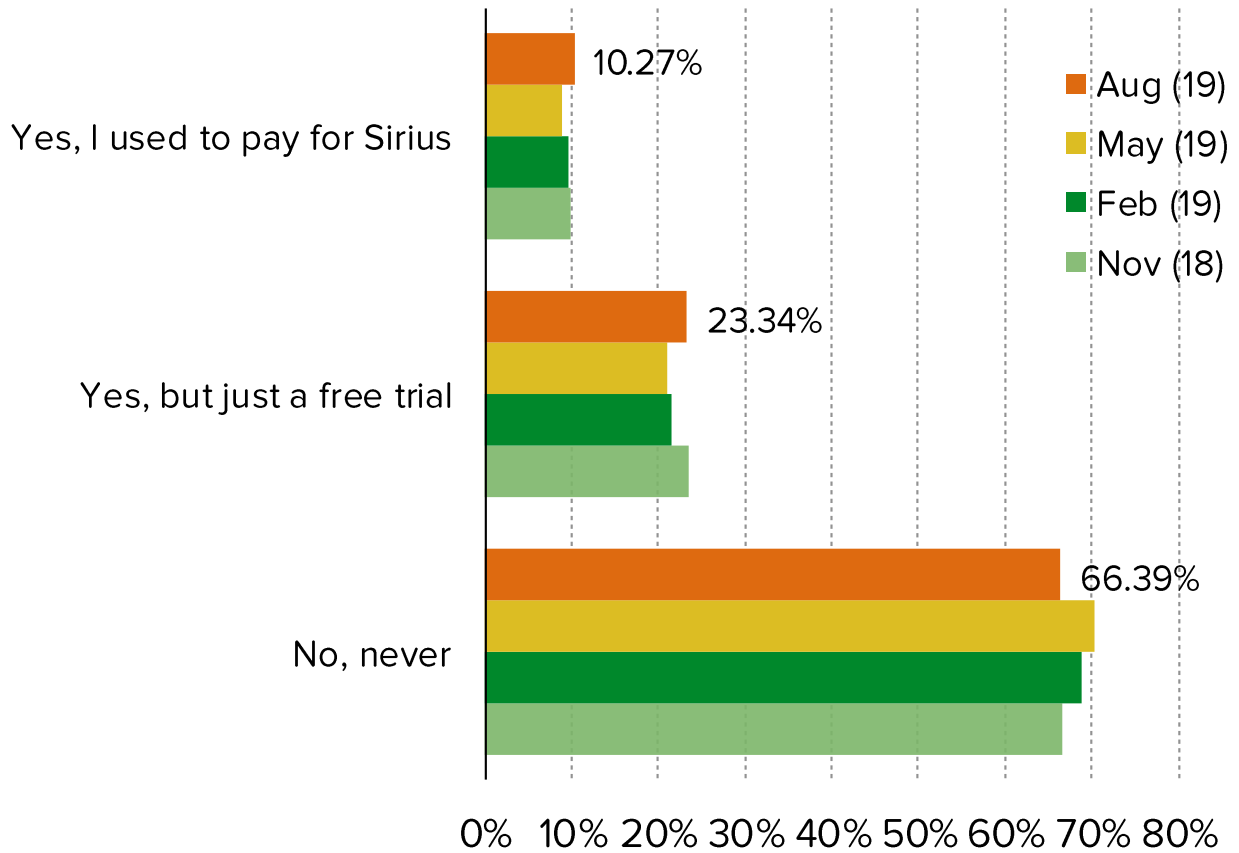
WHY ARE YOU NOT A SIRIUS XM SUBSCRIBER? (SELECT ALL THAT APPLY)

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



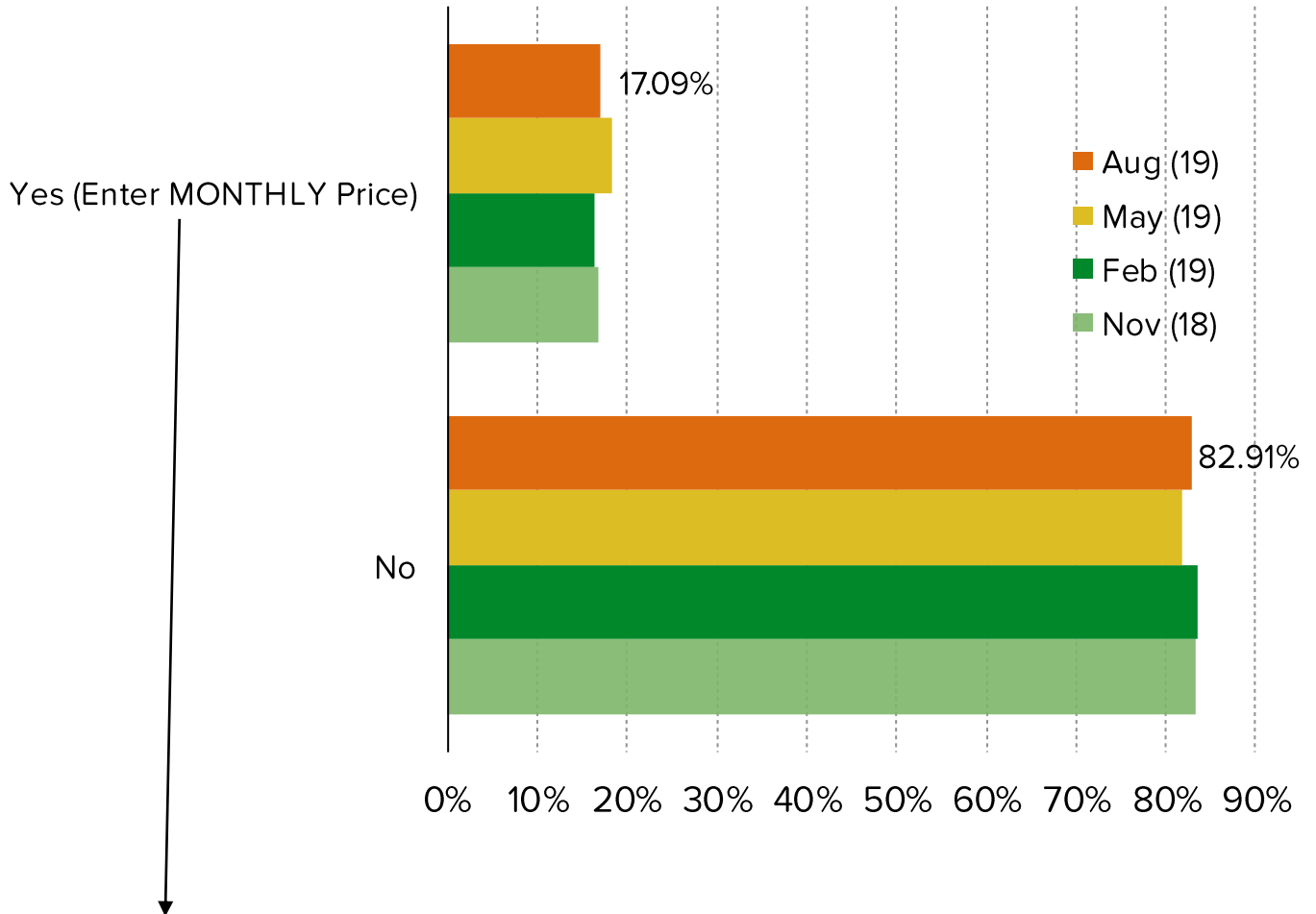
HAVE YOU EVER BEEN A SIRIUS XM SUBSCRIBER?

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.

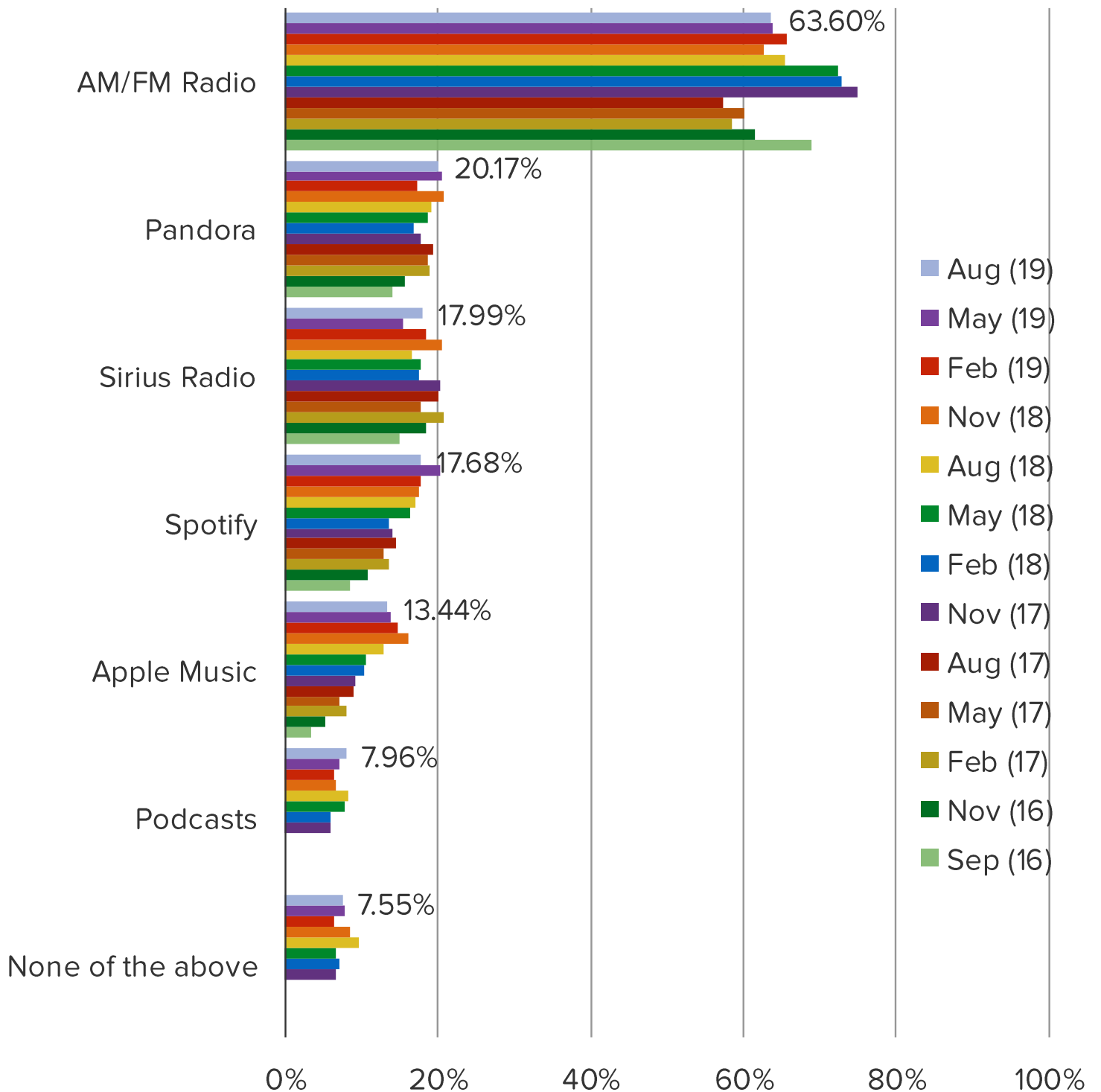


AVERAGE PRICE: \$10.66
MEDIAN PRICE: \$5

MARKET SHARE IN THE CAR

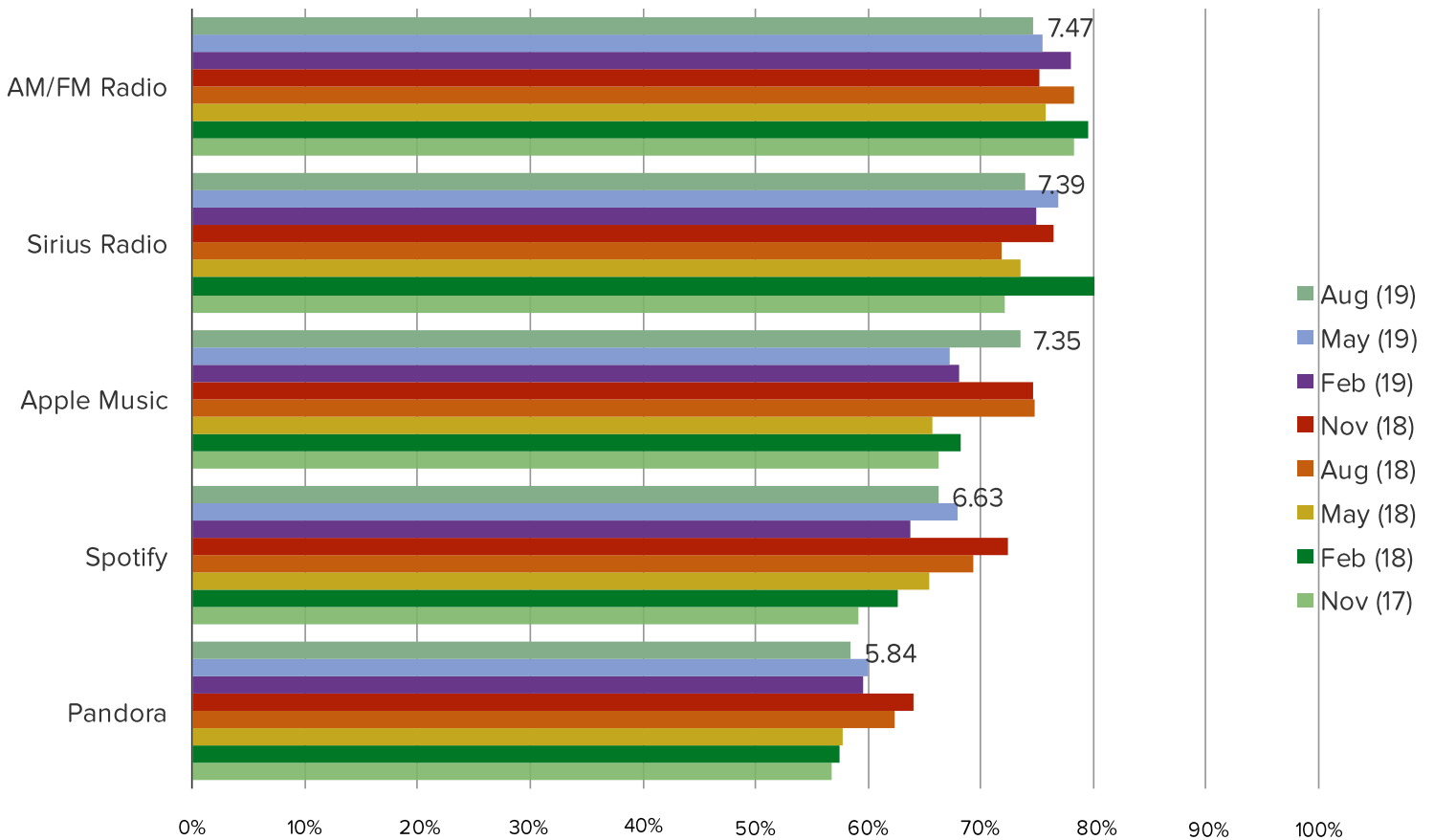
DO YOU REGULARLY OR OCCASIONALLY LISTEN TO THE FOLLOWING IN YOUR CAR?

Posed to all respondents who own / lease a car



AROUND WHAT PERCENTAGE OF YOUR TOTAL CAR LISTENING DO YOU DO WITH THE FOLLOWING?

Posed to all respondents who own / lease a car and regularly or occasionally listen to each in the car.

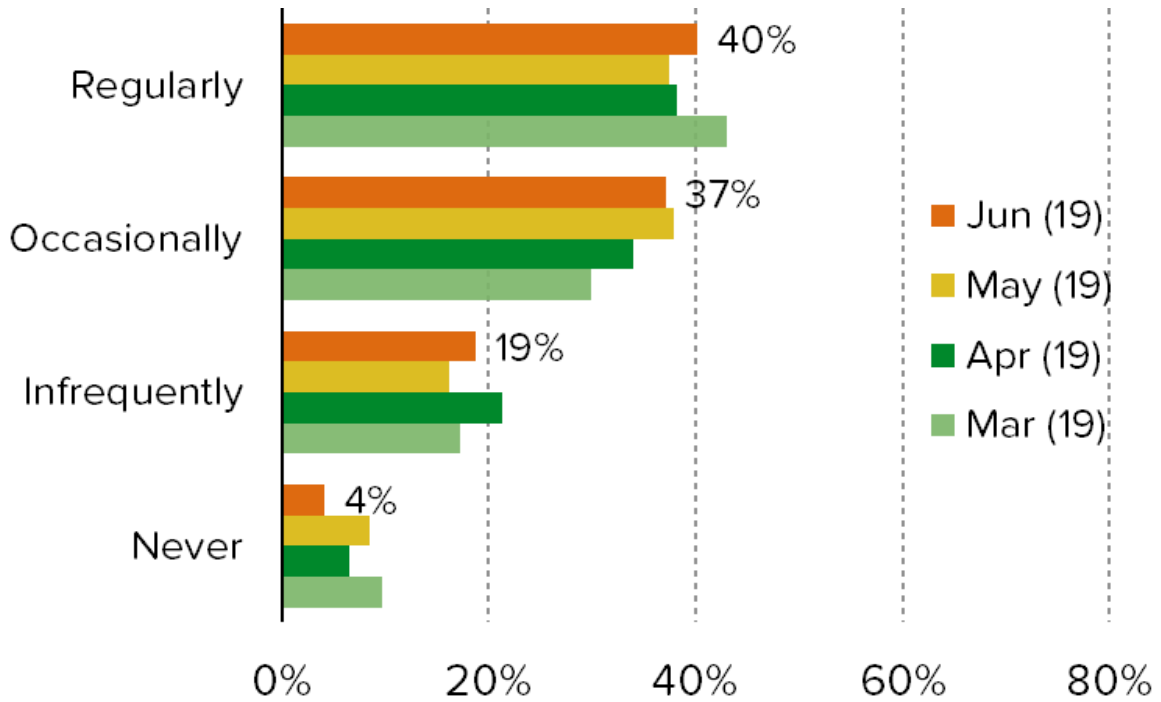


Note: Each was asked of respondents who said they regularly or occasionally listen to it in the car. So this chart tells you that respondents who occasionally or regularly listen to Sirius in the car spend around 70% of their time in the car listening to Sirius.

SPOTIFY MONTHLY TRACKERS

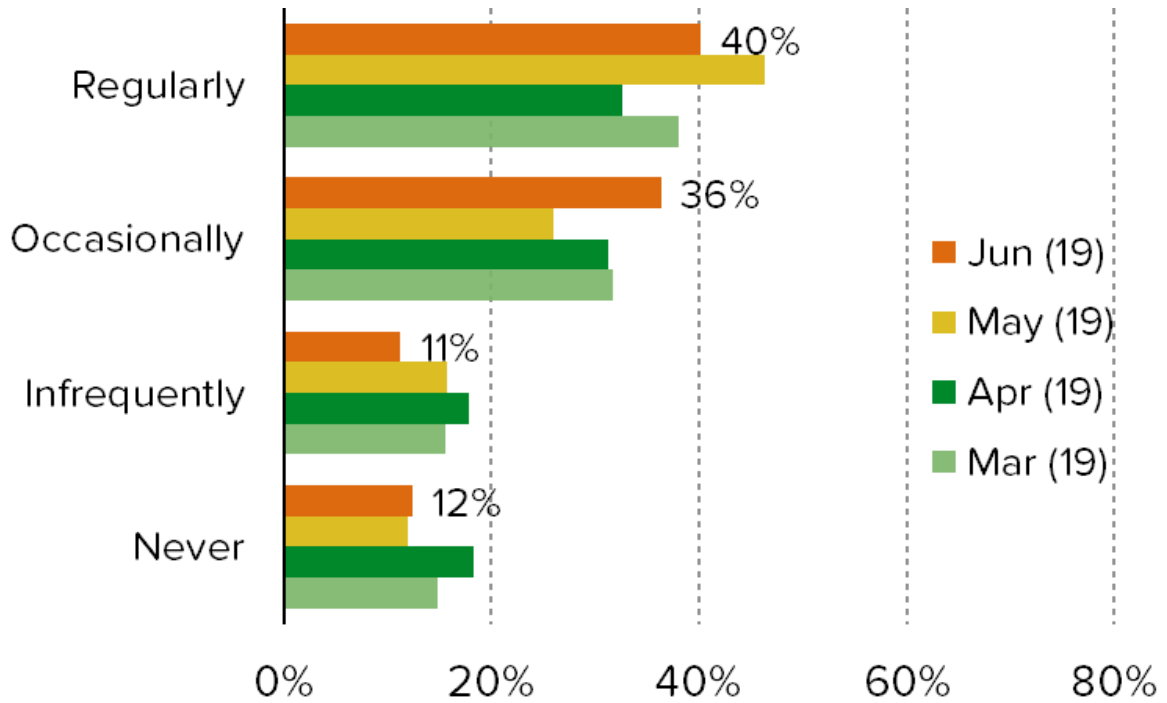
HOW OFTEN DO YOU LISTEN TO NEW MUSIC ON SPOTIFY (RELEASED WITHIN THE PAST 6 MONTHS)?

Posed to Spotify account holders.



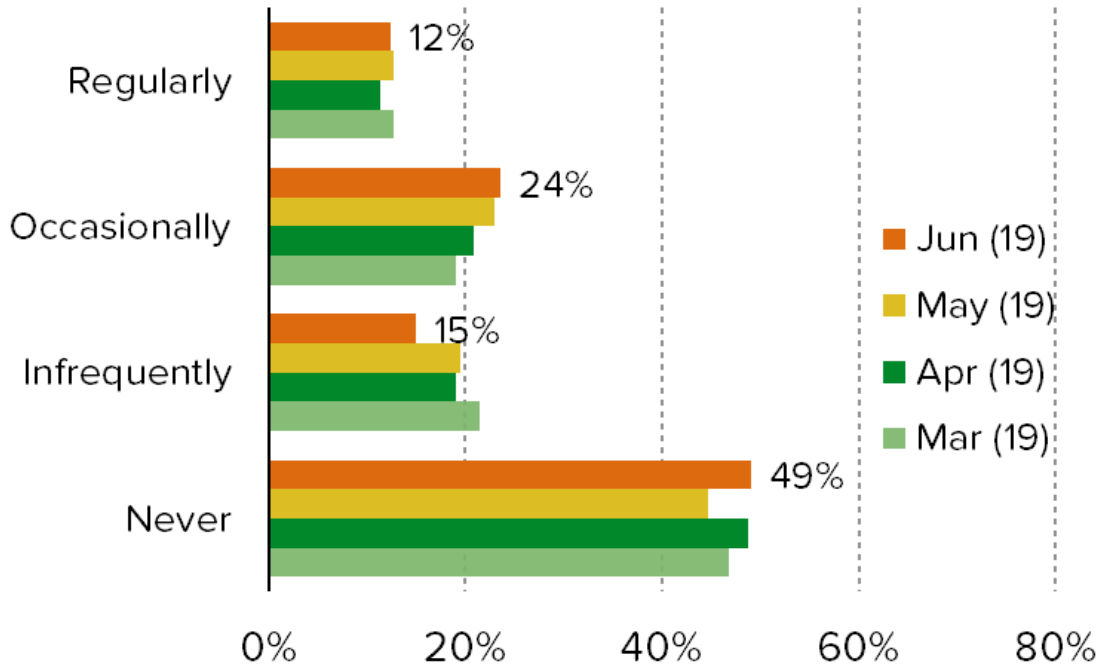
HOW OFTEN DO YOU LISTEN TO CATALOGUE MUSIC ON SPOTIFY (RELEASED 6+ MONTHS AGO)?

Posed to Spotify account holders.



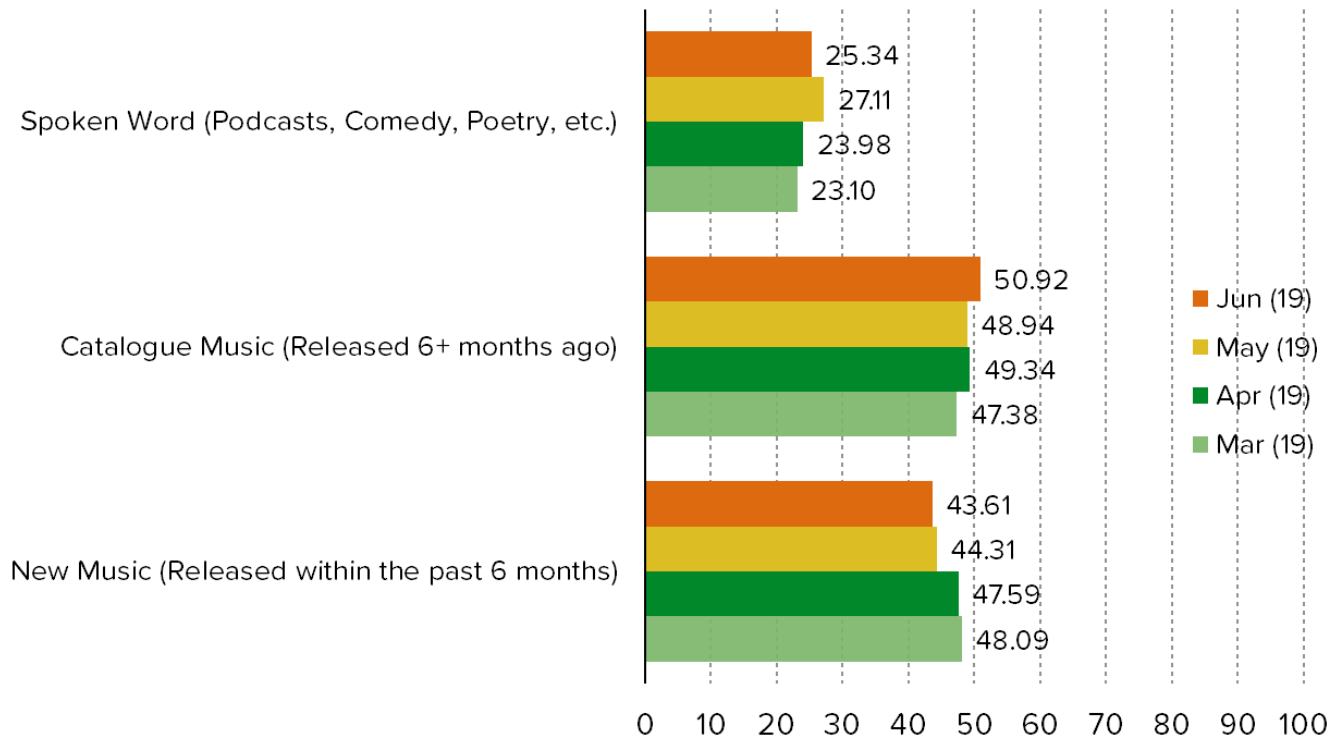
HOW OFTEN DO YOU LISTEN SPOKEN WORD ON SPOTIFY (PODCASTS, COMEDY, POETRY, ETC)?

Posed to Spotify account holders.



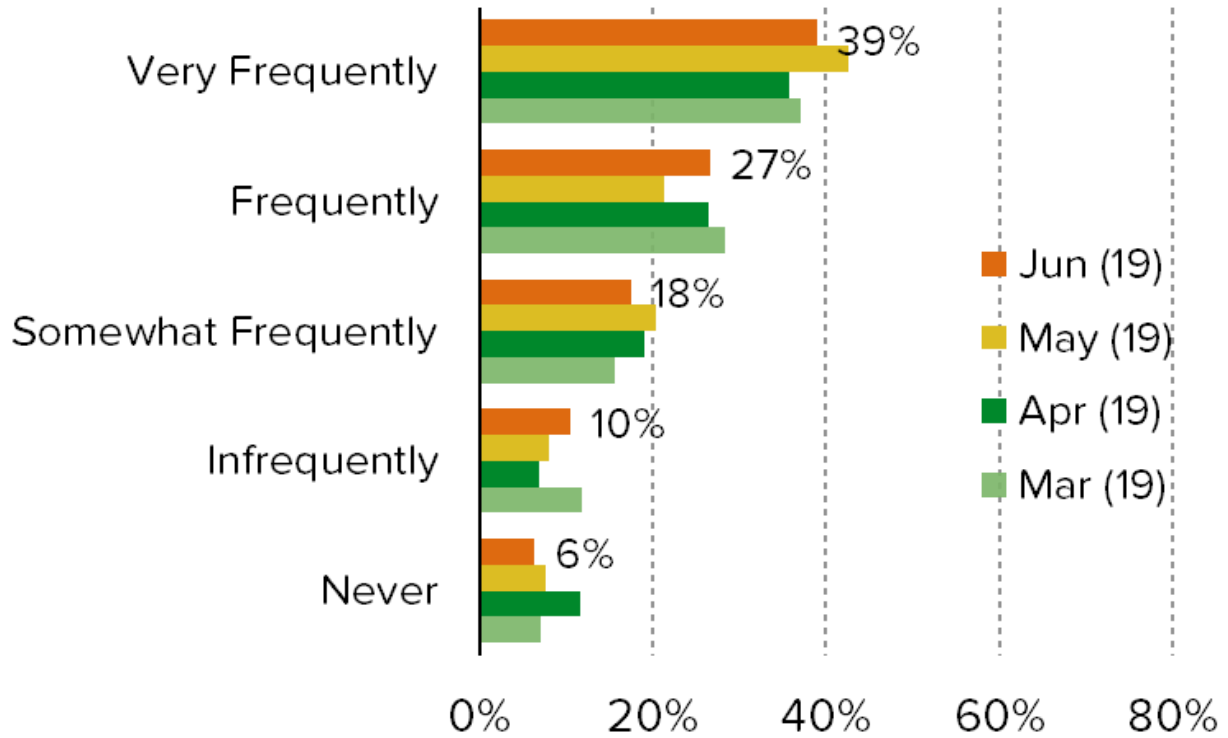
WHAT PERCENTAGE OF YOUR LISTENING TIME ON SPOTIFY IS DEDICATED TO THE FOLLOWING?

Posed to Spotify account holders.



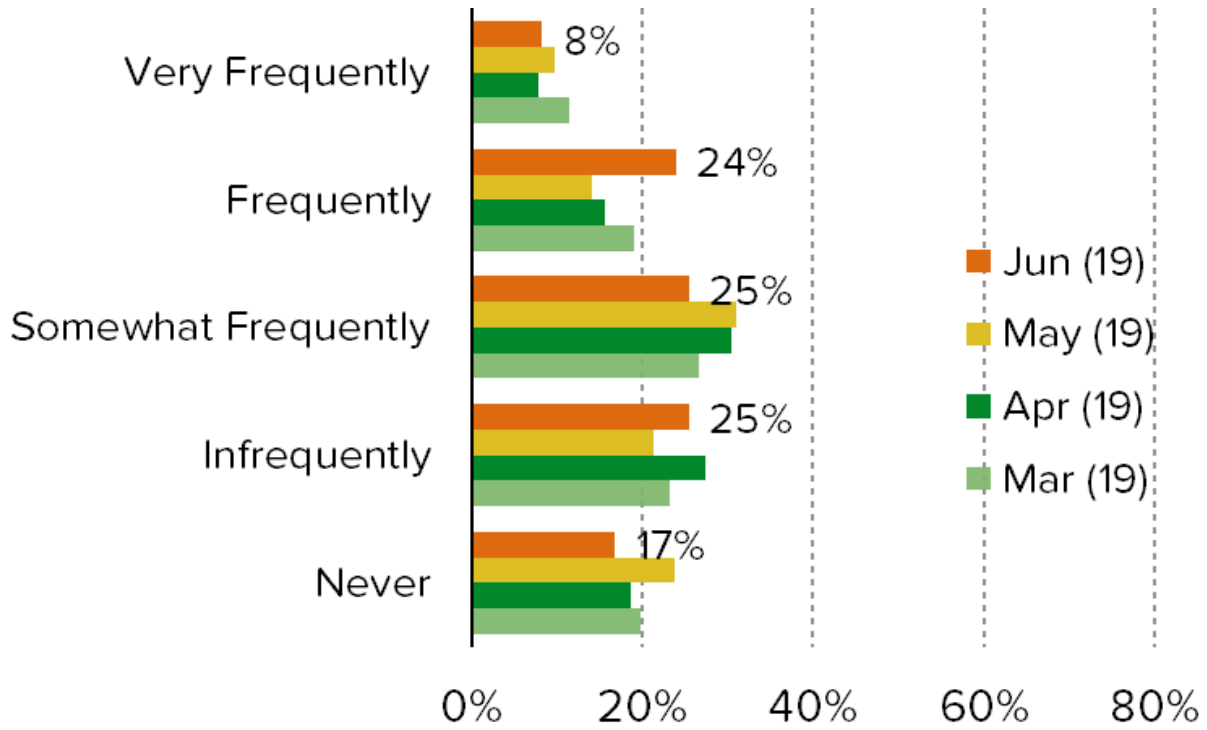
HOW OFTEN DO YOU LISTEN TO PLAYLISTS CREATED BY ME ON SPOTIFY?

Posed to Spotify account holders.



HOW OFTEN DO YOU LISTEN TO PLAYLISTS CREATED BY OTHERS ON SPOTIFY?

Posed to Spotify account holders.



WHAT PERCENTAGE OF YOUR PLAYLIST LISTENING IS...

Posed to Spotify account holders.

