

BESPOKE SURVEYS

Audio Volume 23

SPOT, SIRI, AAPL, AMZN

1,250+ US Consumers, Balanced to Census



CHECK BREAKDOWN:

TREND CHECKS

STREAMING MUSIC – RECOMMENDATIONS/DISCOVERY

Consumers appear overall satisfied with the recommendations that streaming platforms provide, but YouTube Music and Spotify test slightly better than the competition on this dimension.

JOE ROGAN AND PAID PODCASTS

Podcast listening has increased over time. The share of respondents who would be willing to pay for subscriber only bonus episodes has remained fairly flat over the last 5 quarters. Of those who are willing to pay, several indicate that they would pay for Joe Rogan content.

COMPETITIVE DYNAMICS

Spotify remains in the lead when it comes to feedback related to the overall user experience and available/unique content.

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.

IN THE CAR DYNAMICS

The share of consumers who connect a smartphone to listen to audio in their car continues to track mostly flat (but readings remain near historical highs).

PERCEPTIONS OF SIRI

Consumers primarily view Sirius as a platform to listen to in the car. That said, the share who listen to it casually and while exercising increased sequentially.

NEW QUESTIONS

WHAT IS THE FIRST PLATFORM THAT COMES TO MIND FOR LISTENING TO THE FOLLOWING?

Posed to respondents who listen to each of the following at least somewhat frequently.

MUSIC

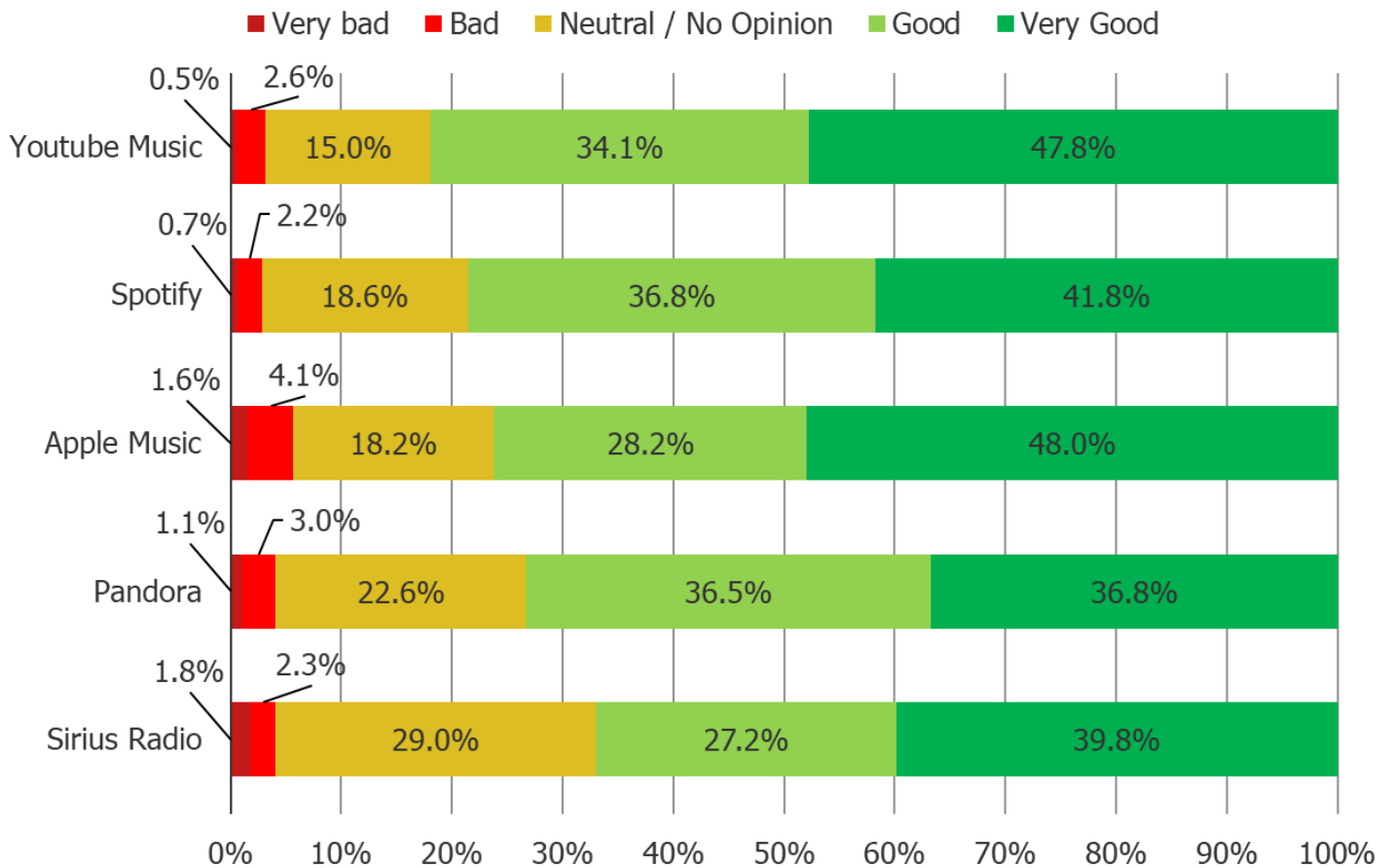


PODCASTS



HOW DO YOU FIND THE RECOMMENDATIONS / DISCOVERY ASPECT OF USING THIS PLATFORM TO BE?

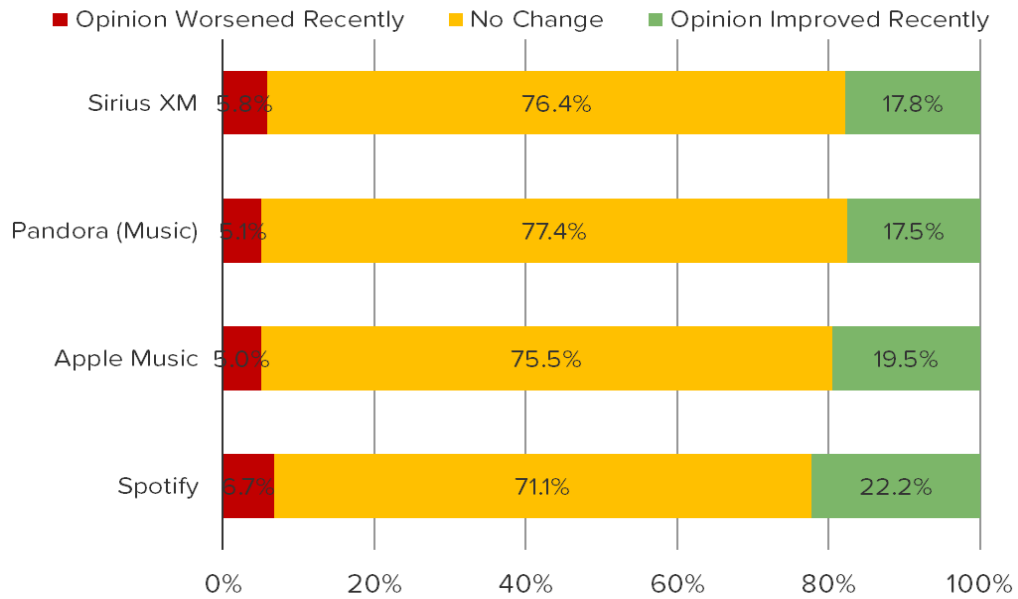
Posed to users of each of the following.



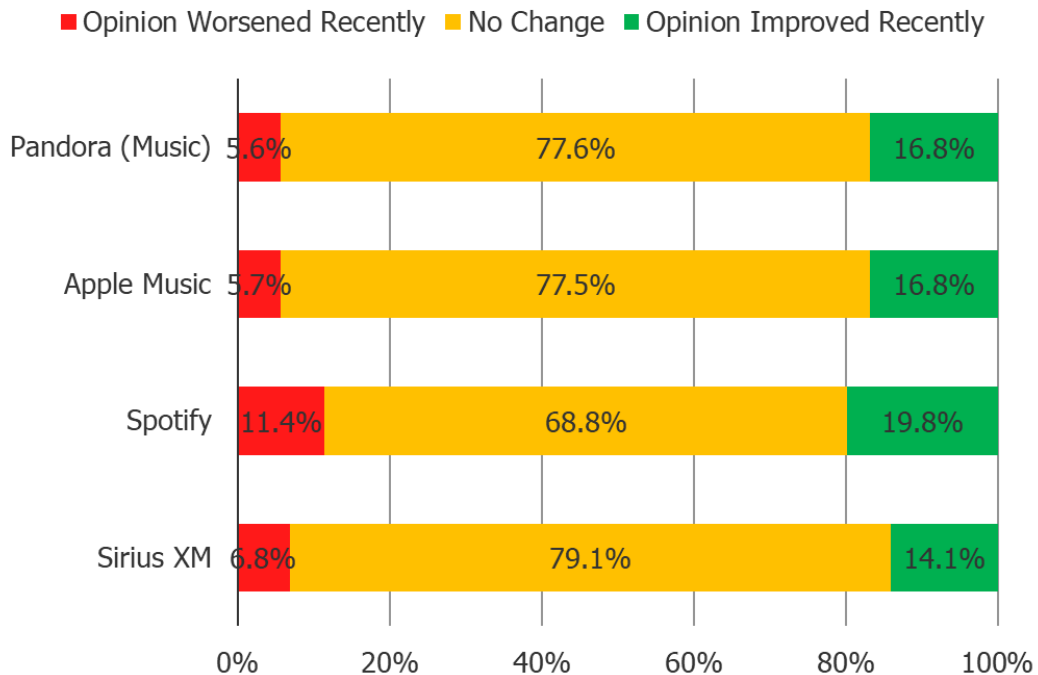
	N =
Sirius Radio	221
Pandora	367
Apple Music	319
Spotify	457
Youtube Music	387

HAS YOUR OPINION OF ANY OF THE FOLLOWING CHANGED RECENTLY?

May 2022



February 2022



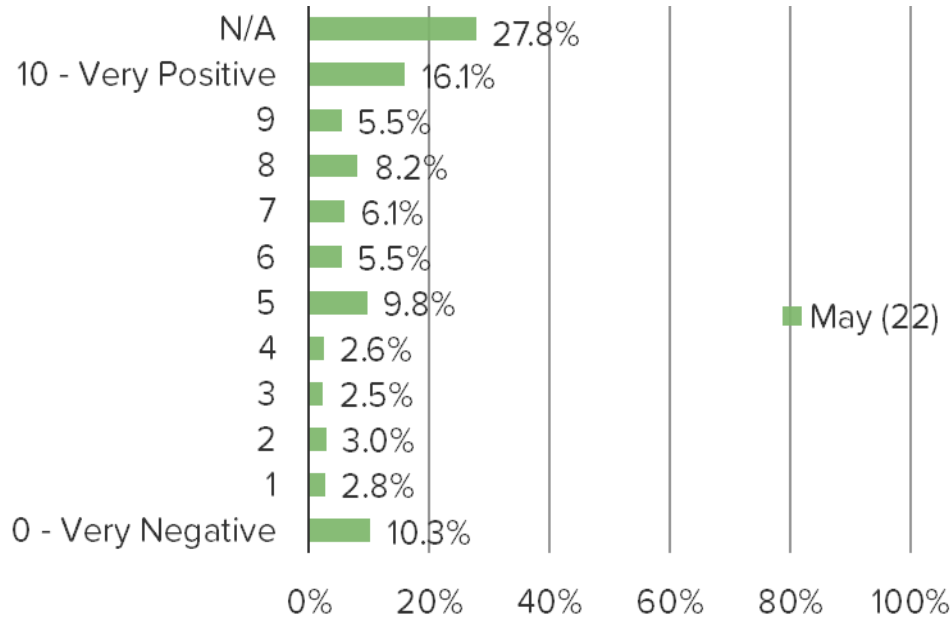
WHY DID YOUR OPINION OF THE FOLLOWING CHANGE RECENTLY?

Posed to all respondents who said their opinion **has worsened**.

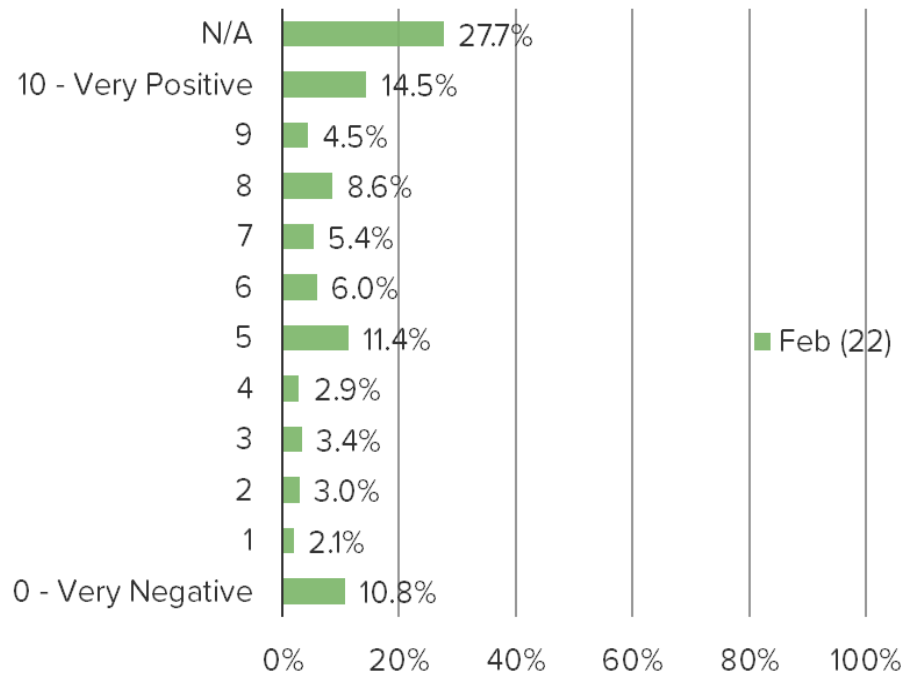
Ads are obnoxious
 Because they had a really bad glitch recently
 Because they started removing a lot of music due to stupid artist scandals around covid propaganda. It's not really their fault at all, they did the right thing to keep Joe Rogans podcast and not give in to pressure. But the absence of artists like Neil Young takes some quality away from their catalog.
 boring
 brand allows conspiracy theories content
 Can't change songs as much as I would like
 Cheap
 Compared to other apps it's not that great
 Connection has been very poor
 controversial broadcasters
 Controversy in the news
 cost went up
 Costly and just not interested
 COVID misinformation spread on platform
 data stealing edits to the platform
 doesn't provide what I am looking for
 Embracing far right broadcasts
 Found out how little artists get paid for their music
 I did not like Spotify keeping Joe Rogan
 Idiot Rogan
 It has a lot of ads
 Joe Rogan
 Joe Rogan
 joe rogan
 Joe rogan
 Joe Rogan fiasco
 Joe Rogan is awful
 Joe Rogan still being on the platform after consistently giving medical misinformation
 Outdated
 Pass
 Poery
 Policy of company
 Political views worrisome
 Quality of the app
 Rogan young war
 Supporting Joe Rogan
 the data taken is less
 The Joe Rogan scandal and they suggest music to my playlist hen I didn't ask for it.
 The premium free trial changed
 The price on this one
 the price to something high to pay
 The whole Joe Rogan thing.
 The whole thing with Neil young and joe Rogan
 Their commitment to shows that present misinformation.
 Their deal with Joe Rogan
 their support of a host spreading untruths
 there are ads that should not be
 There employees being baby's about Joe Rogan.
 They changed thinga
 They do not pay artists very well.
 They let artists leave rather than do the right thing.
 They took the wrong approach to fake news
 To many ads

WHAT IS YOUR OPINION OF JOE ROGAN?

May 2022



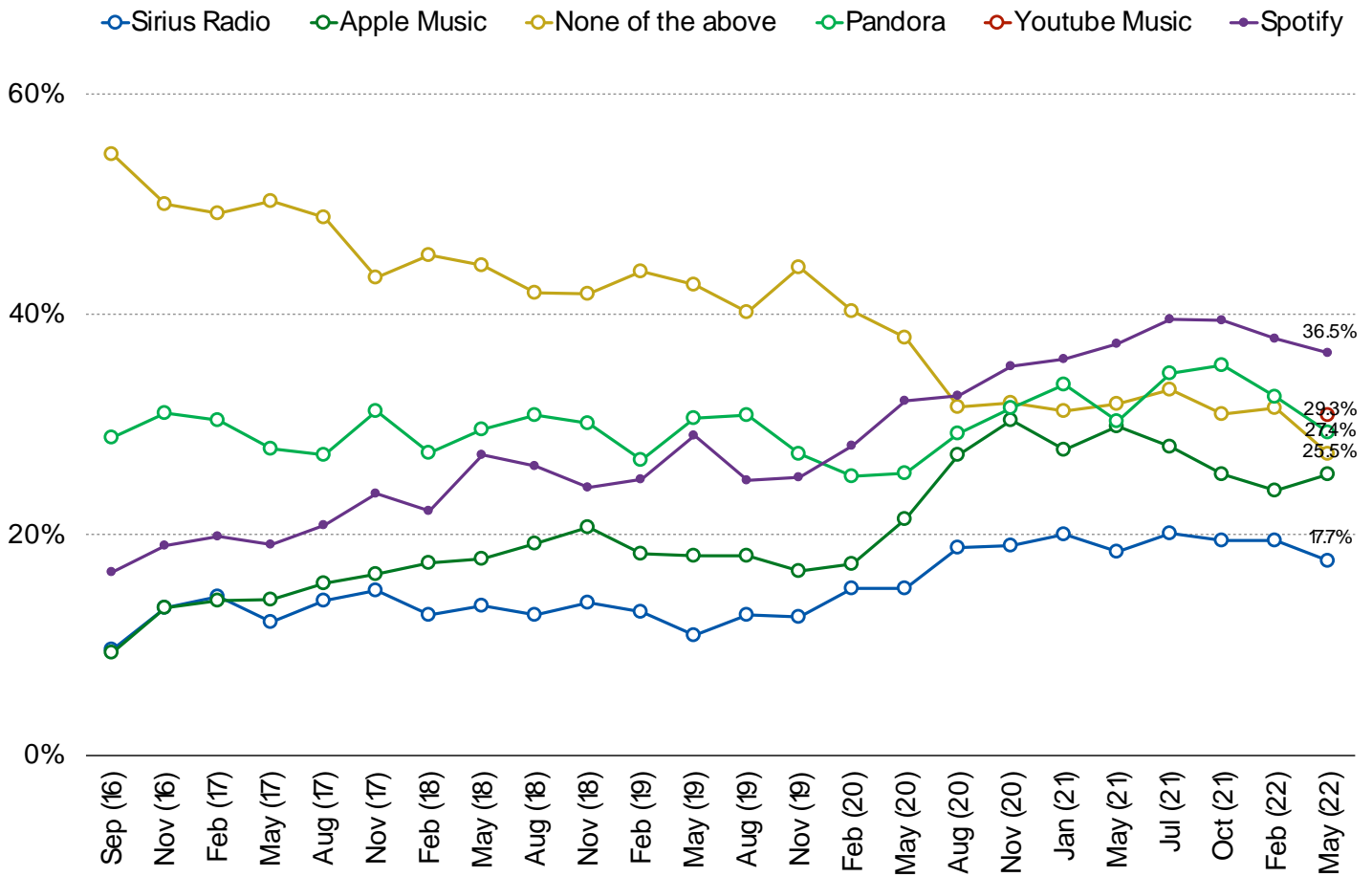
February 2022



STREAMING AND SATELLITE AUDIO TRENDS

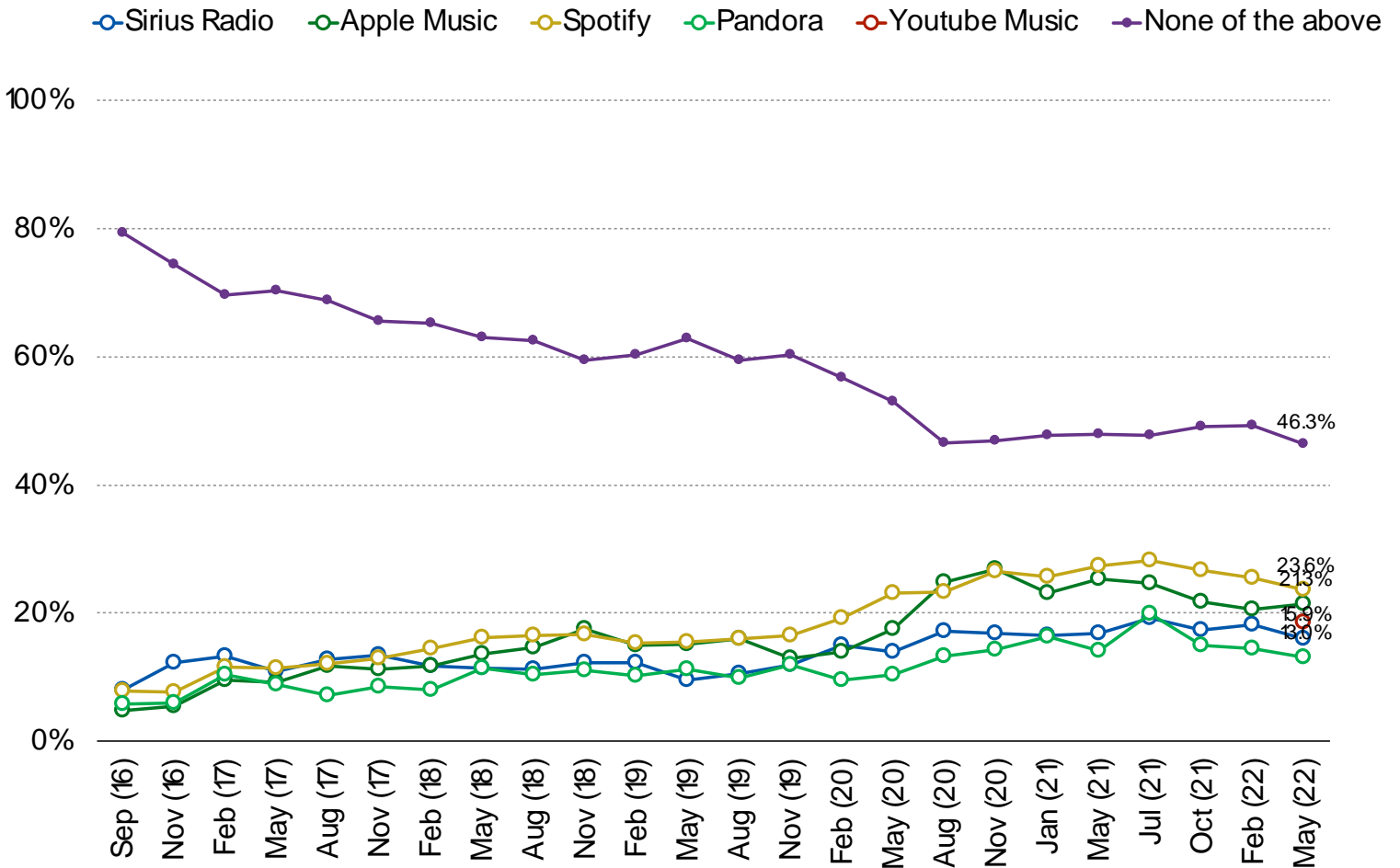
DO YOU HAVE AN ACCOUNT WITH ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.



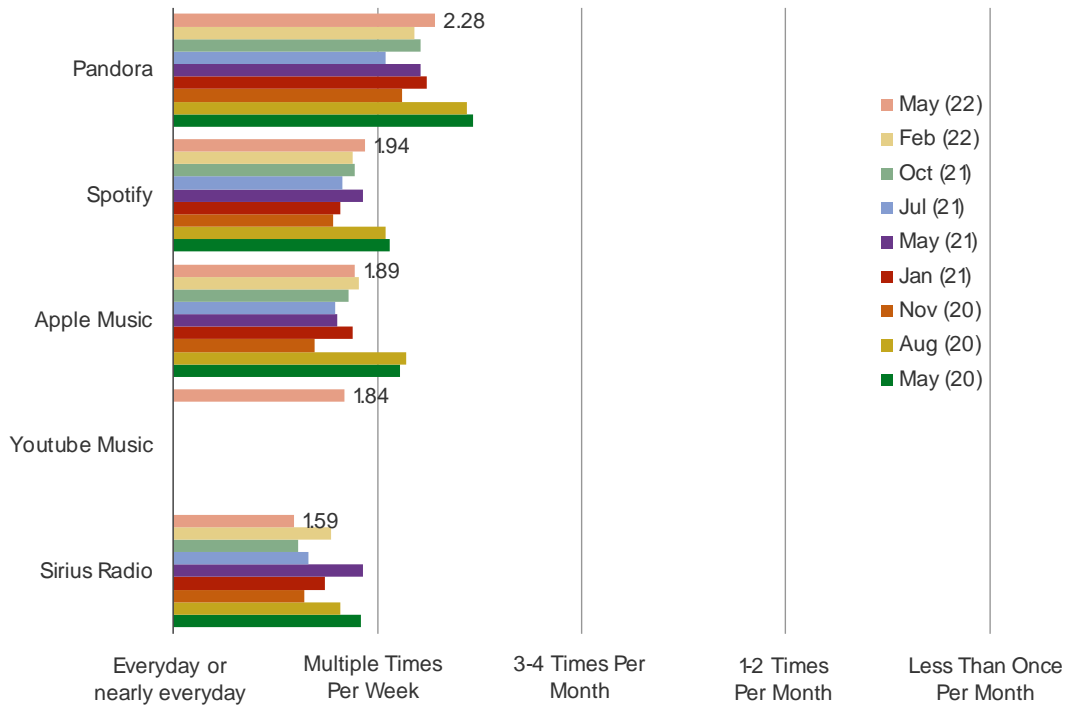
ARE YOU CURRENTLY PAYING FOR A SUBSCRIPTION WITH ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents.



HOW OFTEN DO YOU USE THE FOLLOWING?

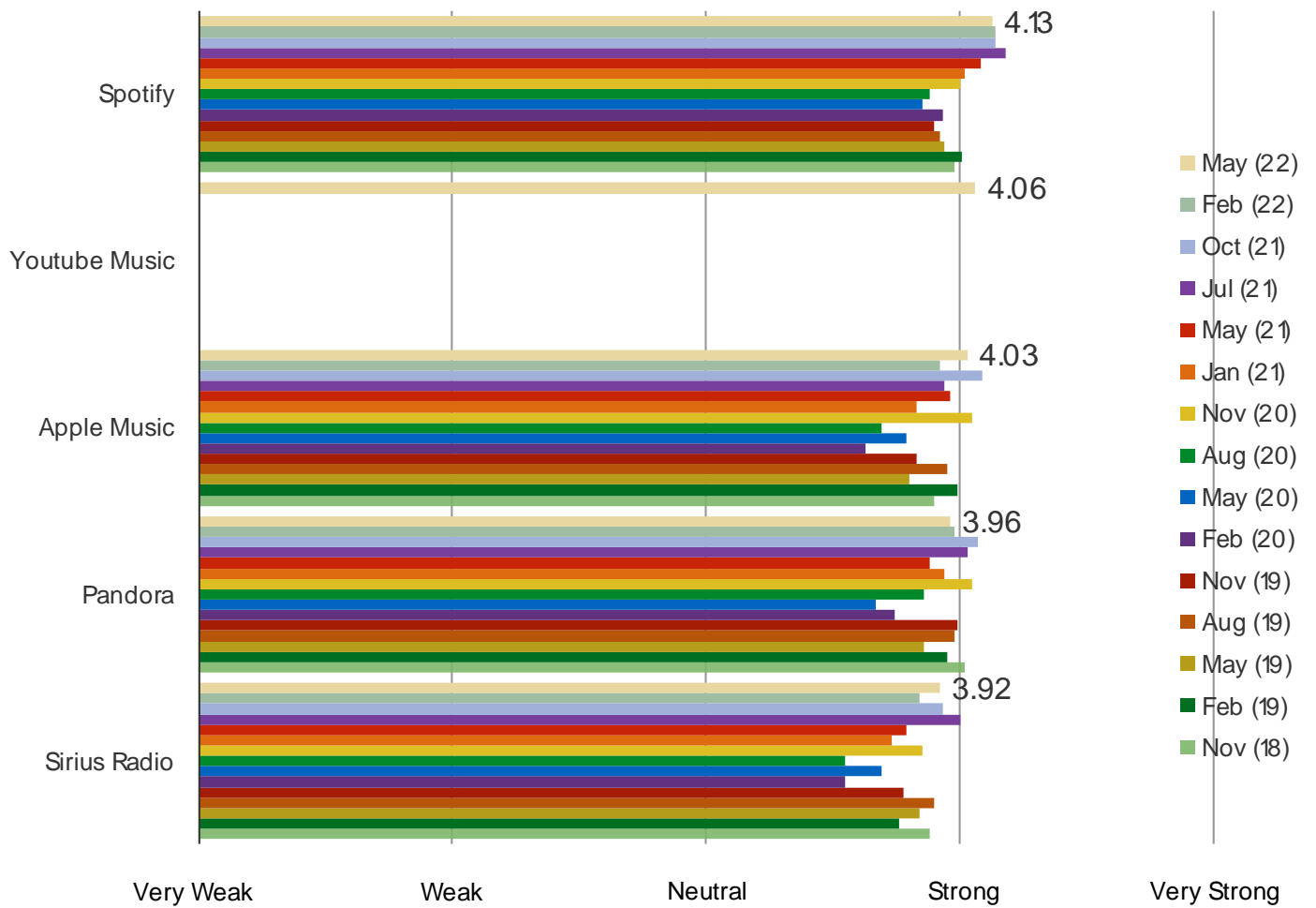
Respondents who have an account with each platform (free or paid)



← More Frequent

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

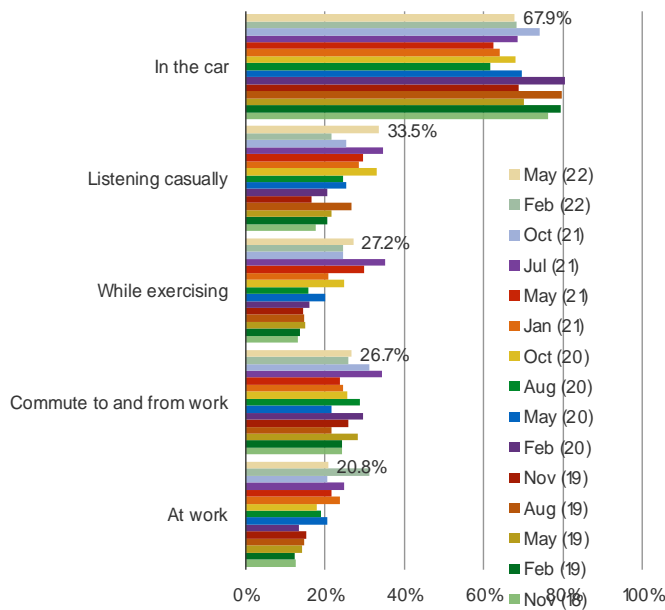
Respondents who pay for each platform



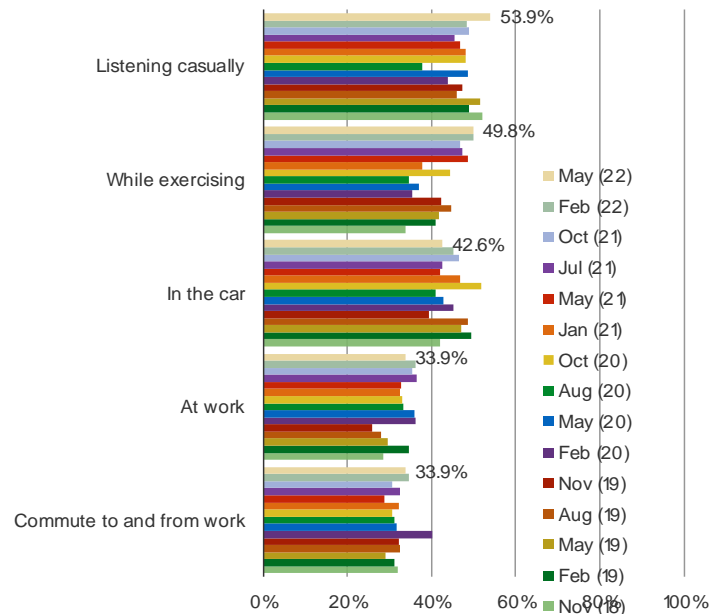
WHERE DO YOU TYPICALLY LISTEN TO THIS PLATFORM? (SELECT ALL THAT APPLY)

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

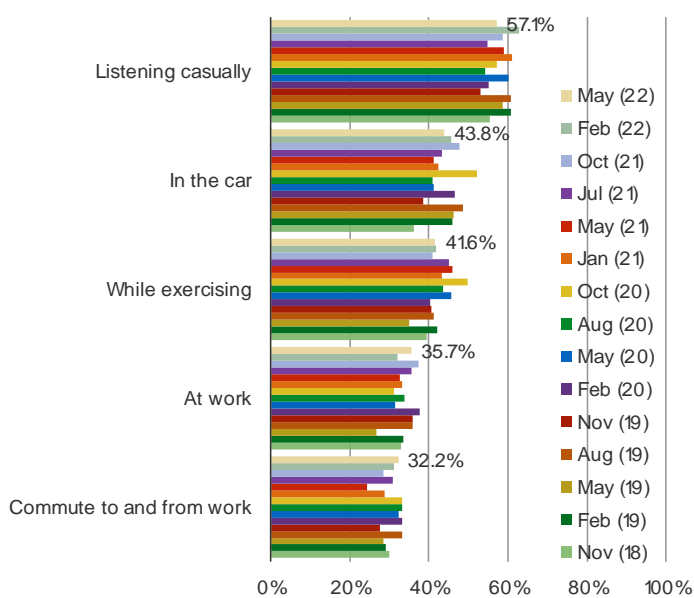
SIRIUS XM



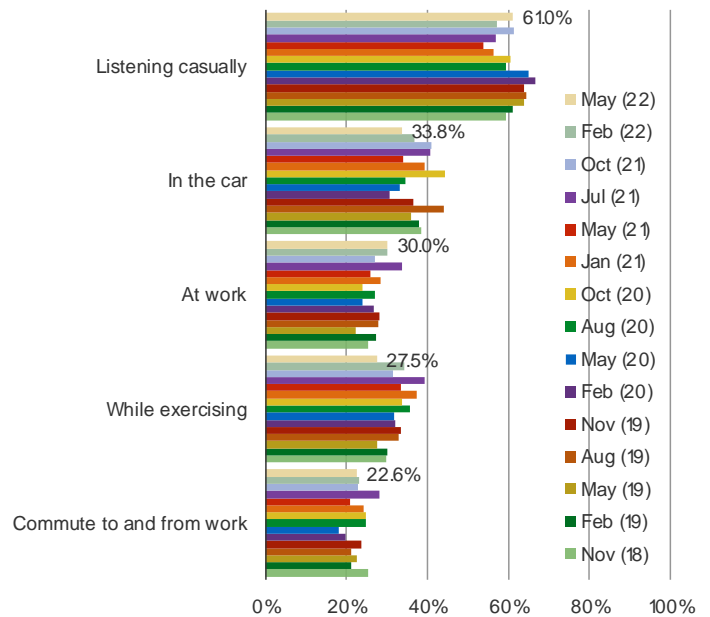
APPLE MUSIC



SPOTIFY

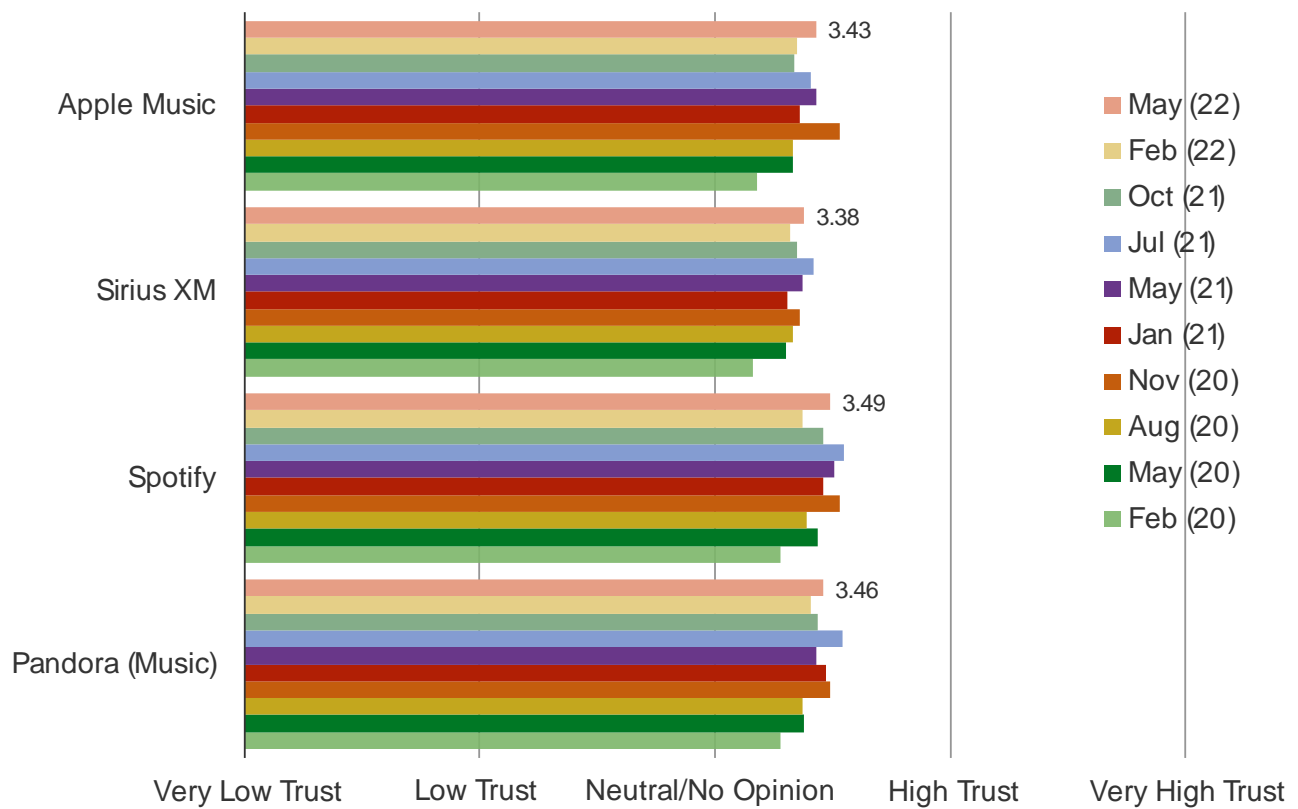


PANDORA



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

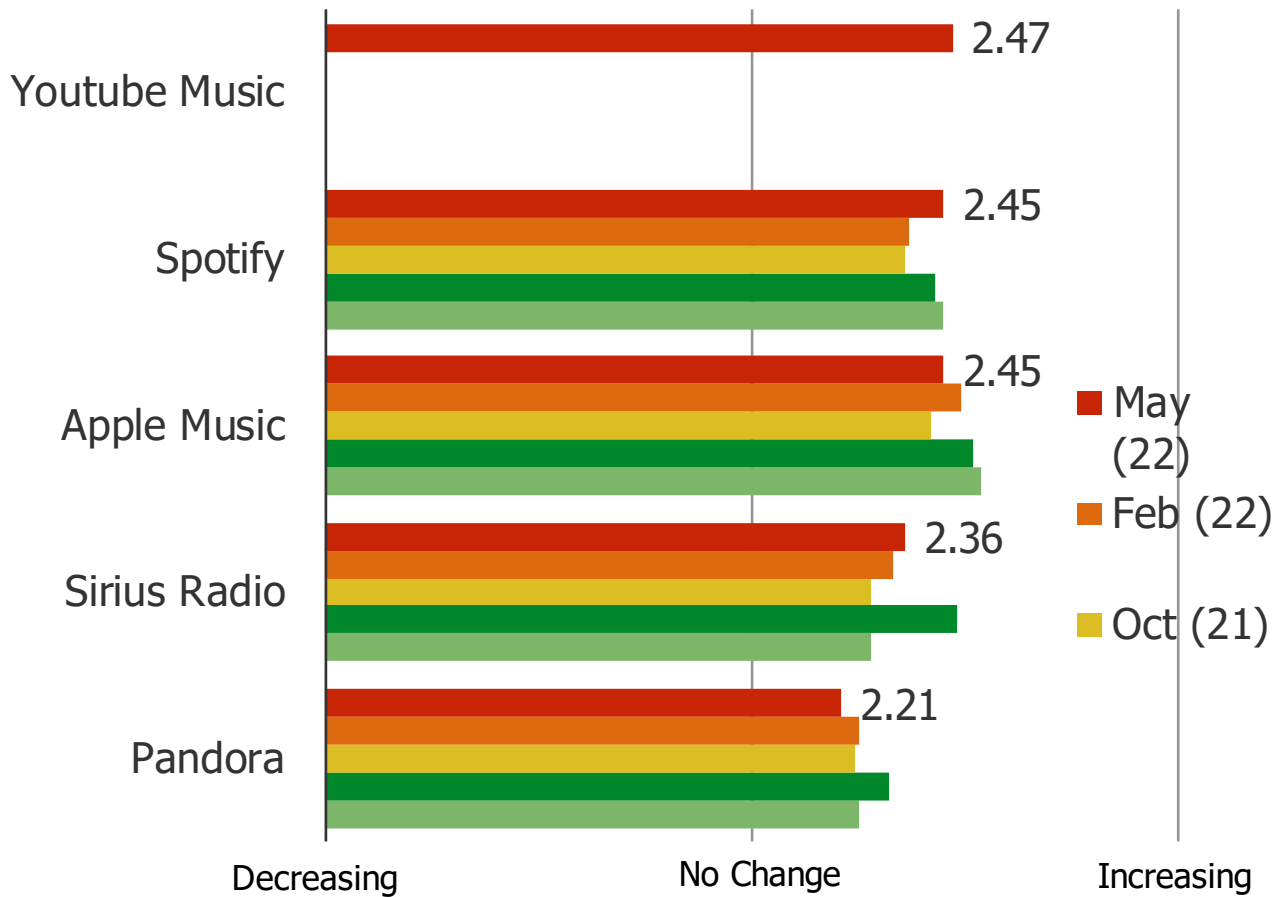
Posed to all respondents



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.

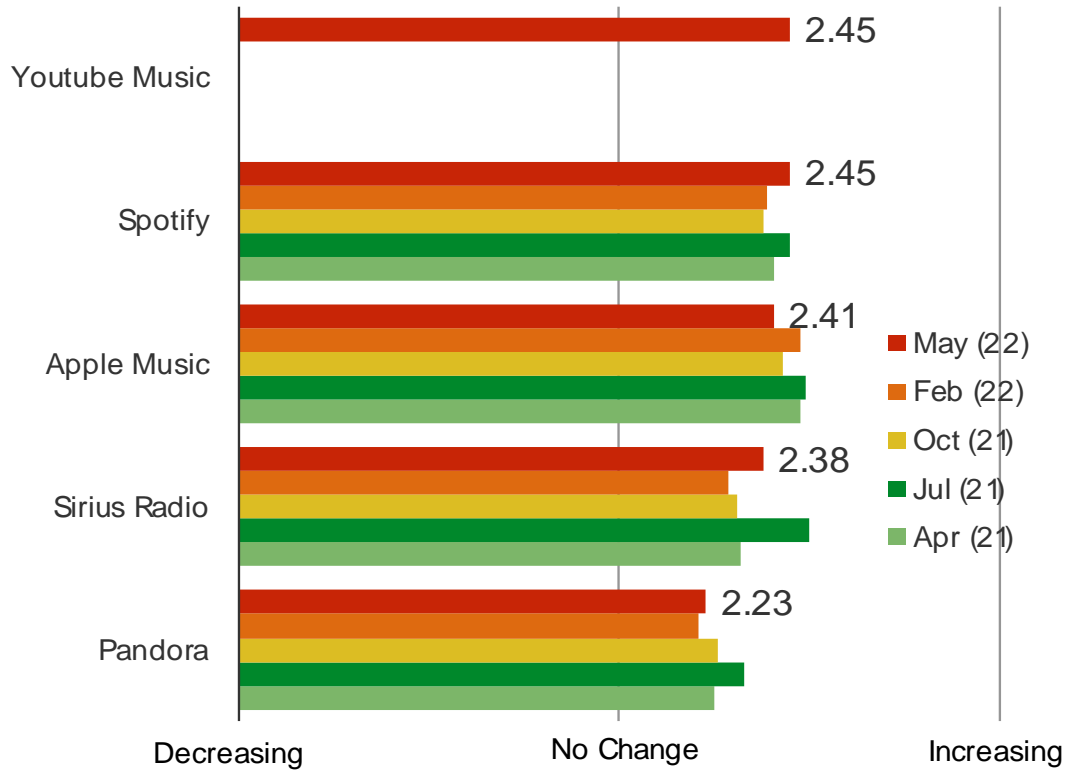
New Music (Released in the Past 6 Months)



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.

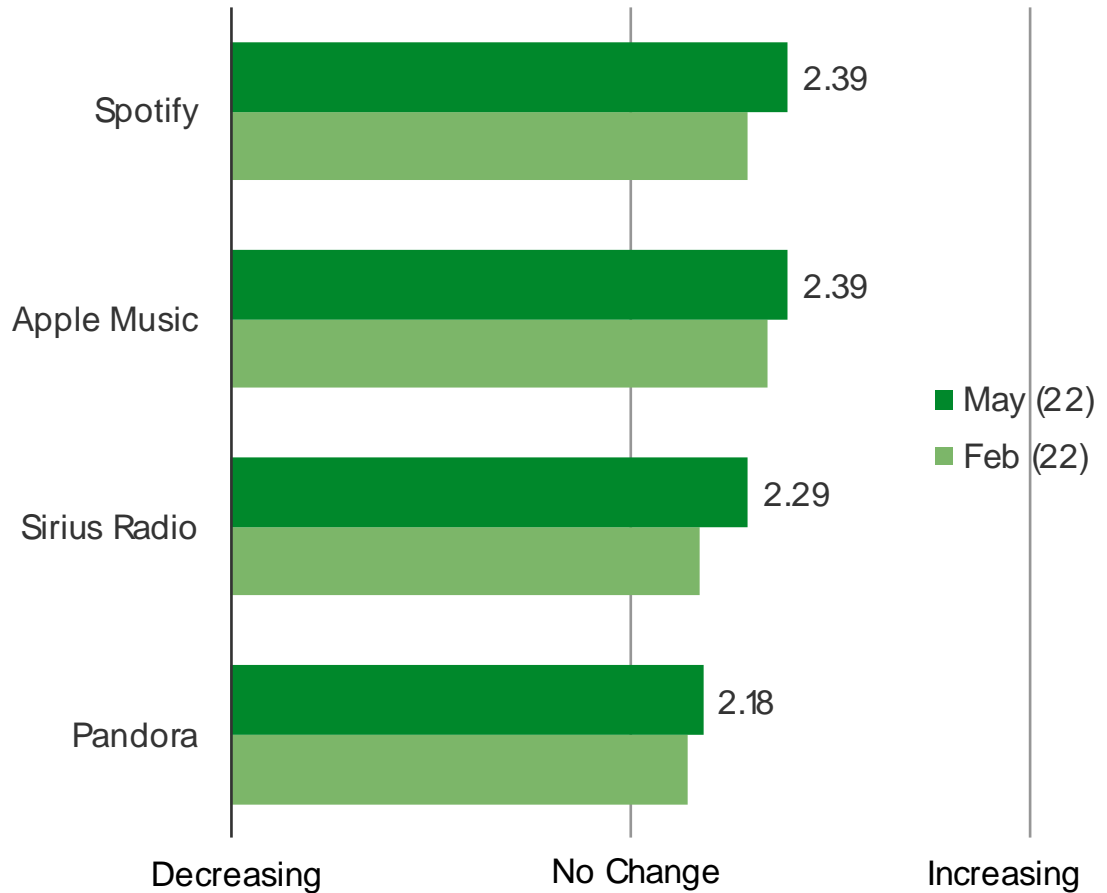
Catalog Music (Released 6+ Months Ago)



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

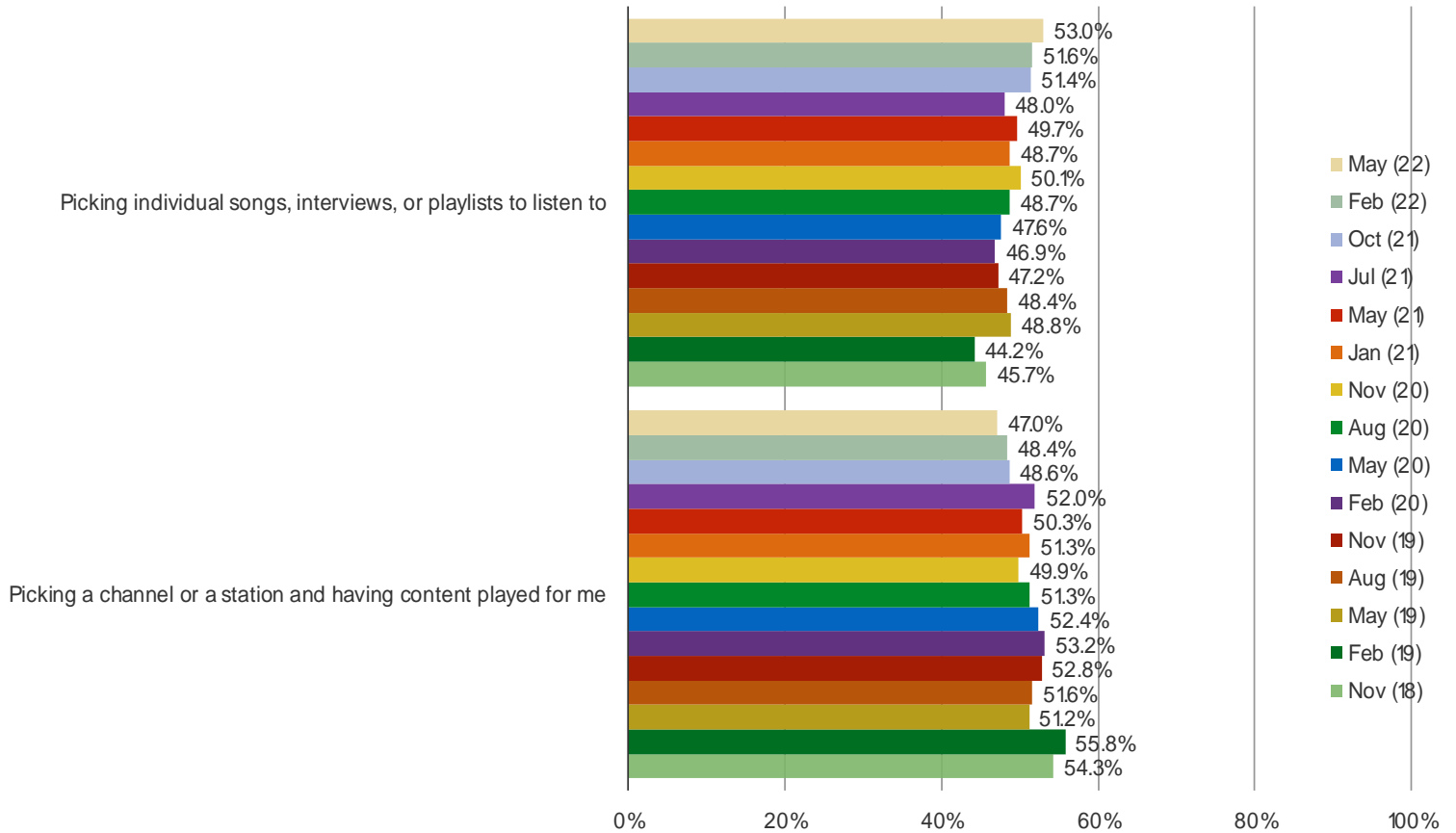
Posed to users of each platform.

Podcasts



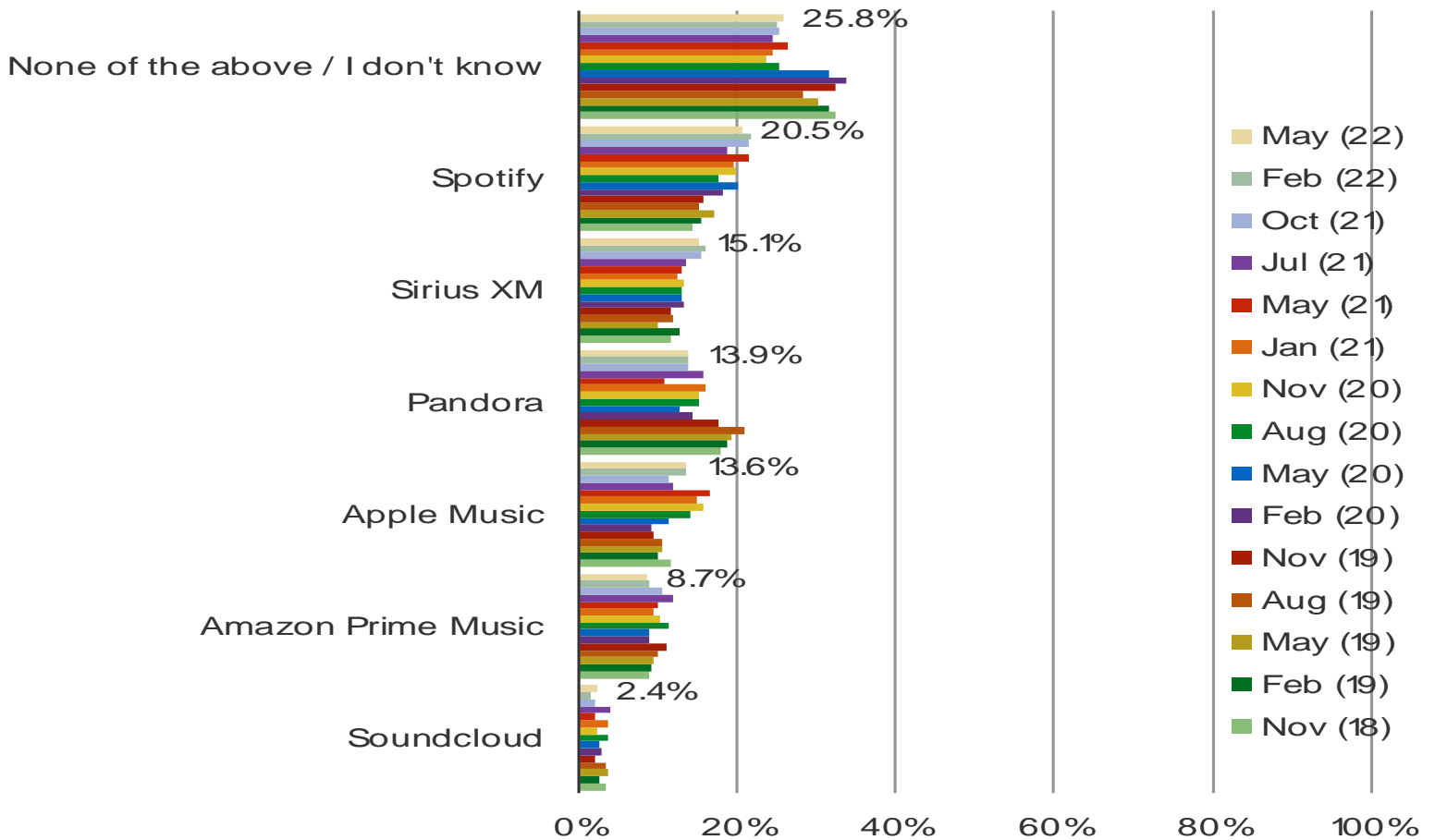
FOR LISTENING TO MUSIC AND TALK-SHOW CONTENT, WHICH IS BETTER?

Posed to all respondents.



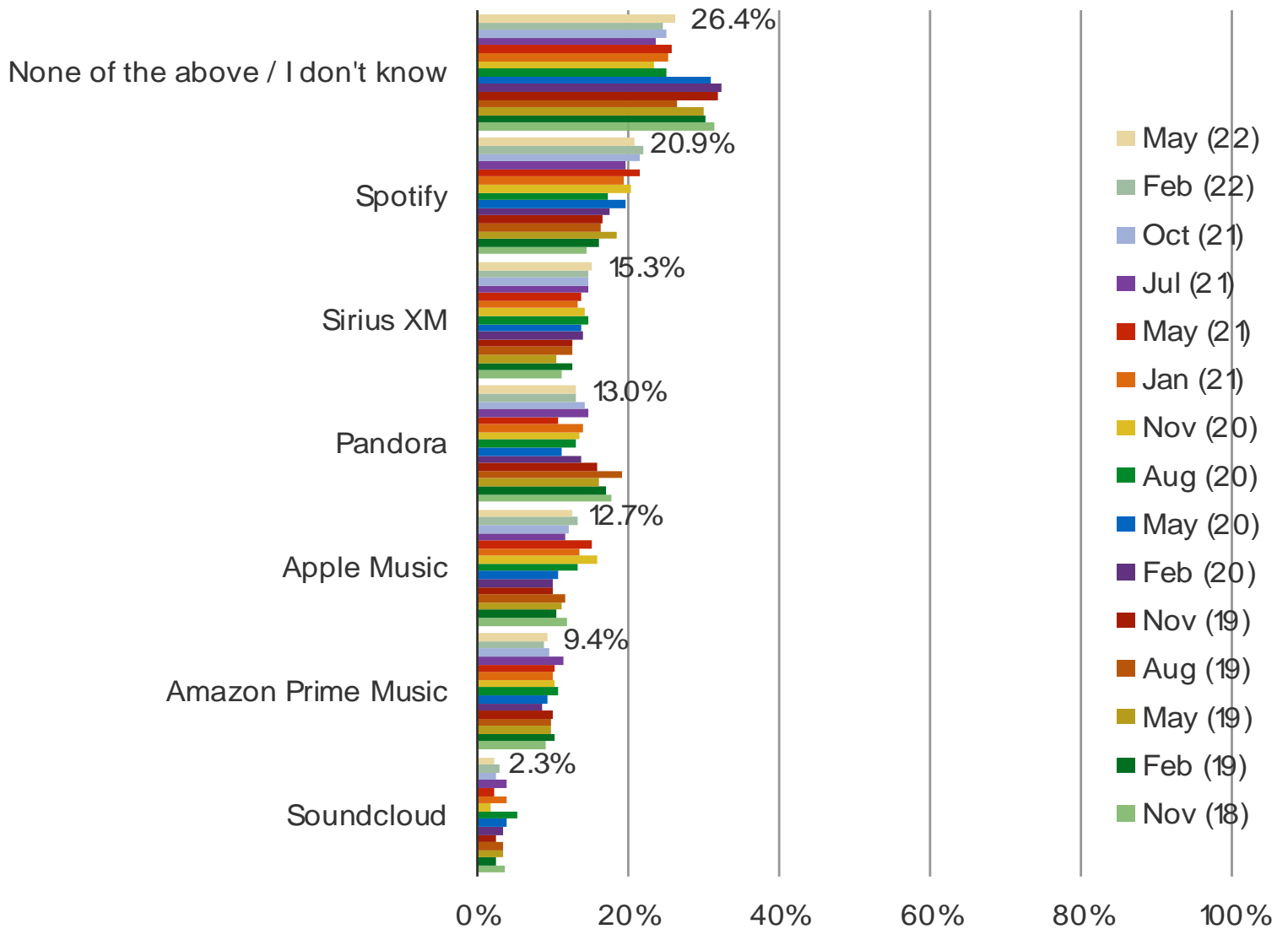
IN YOUR OPINION, WHICH PLATFORM IS BEST WHEN IT COMES TO THE WAY IN WHICH THEY DELIVER CONTENT TO ITS USERS? (IE. THE BEST USER EXPERIENCE)

Posed to all respondents.



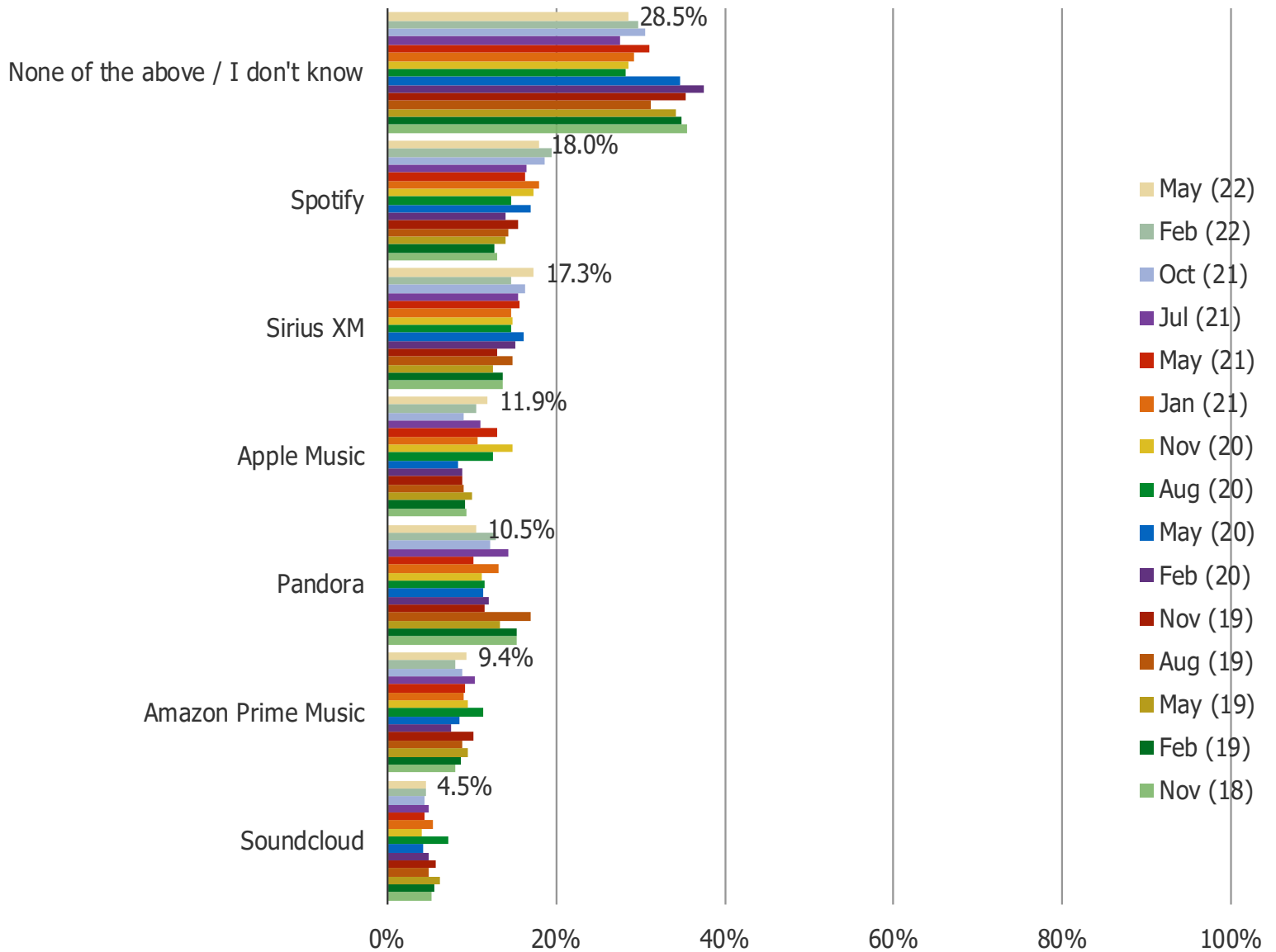
IN YOUR OPINION, WHICH PLATFORM HAS THE BEST CONTENT AVAILABLE?

Posed to all respondents.



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

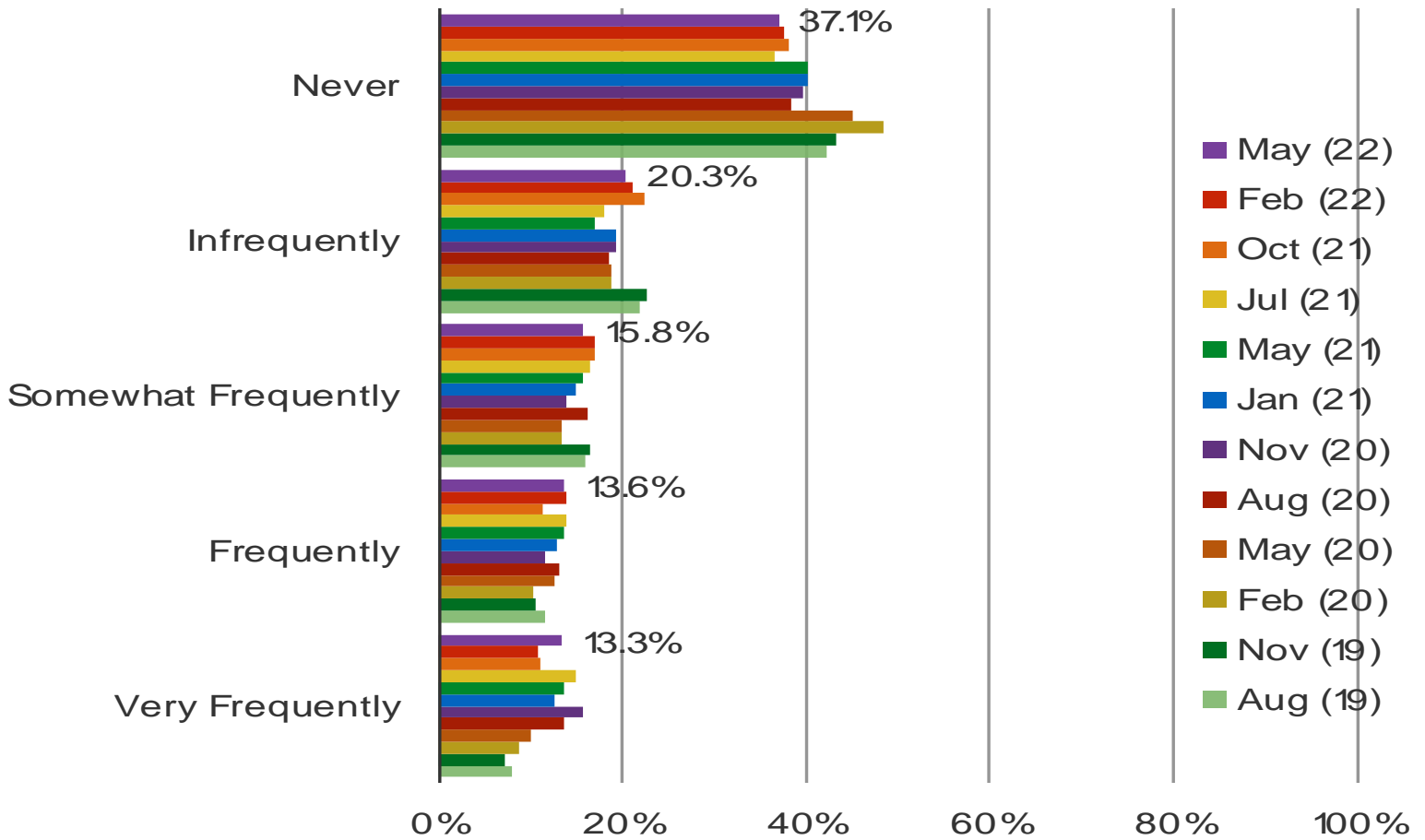
Posed to all respondents.



PODCASTS

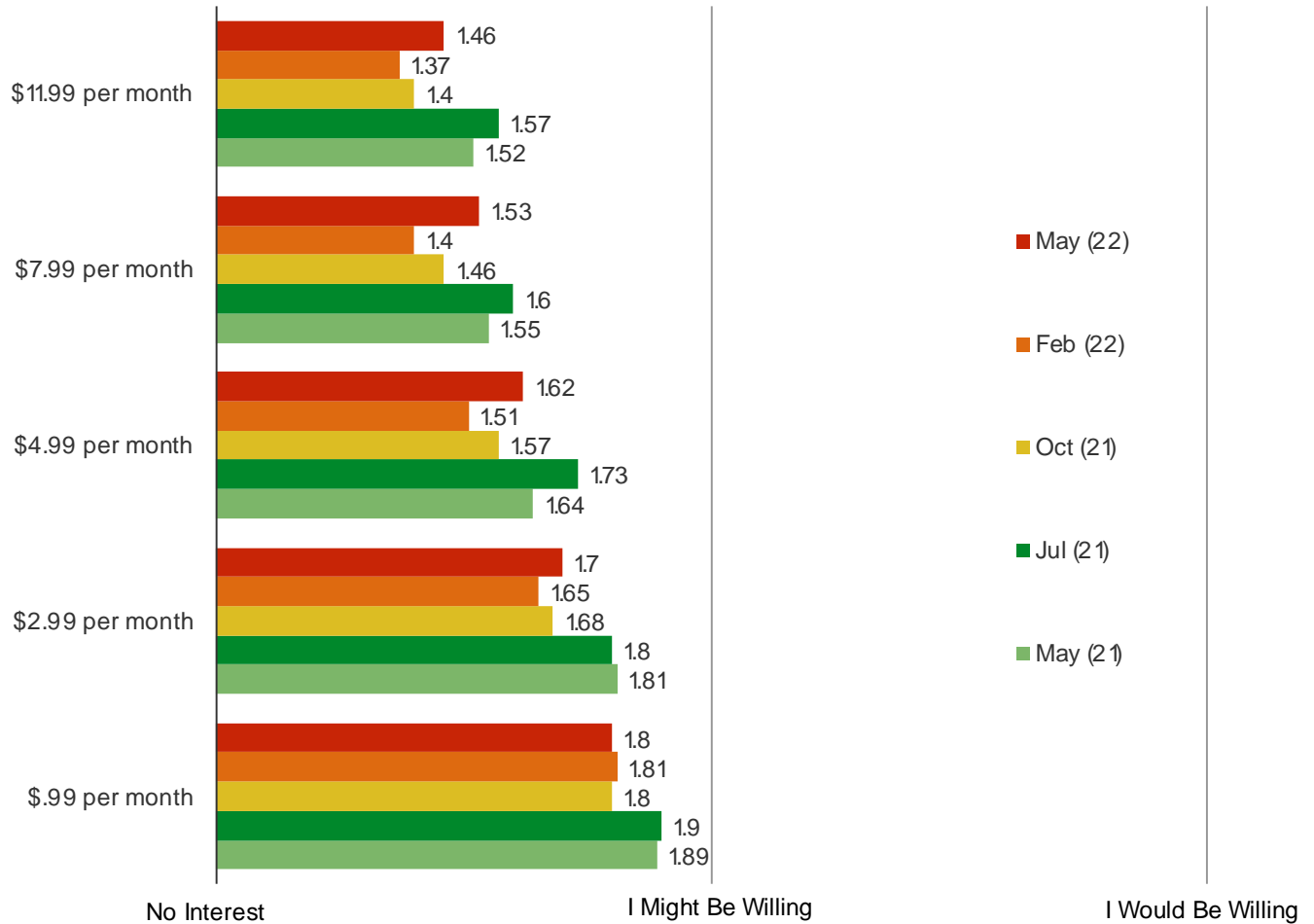
HOW OFTEN DO YOU LISTEN TO PODCASTS?

Posed to all respondents.



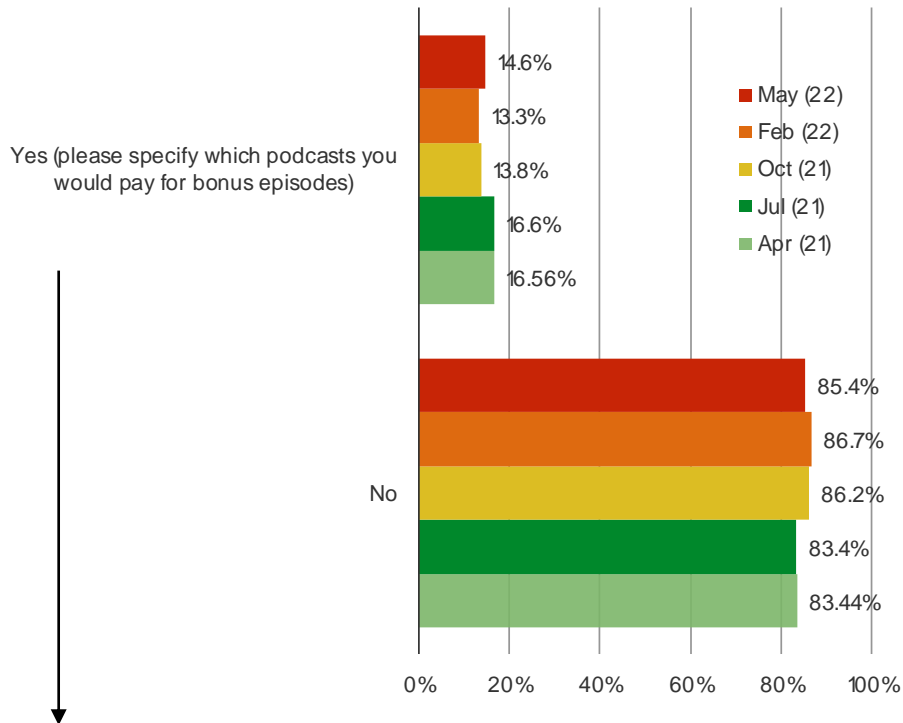
HOW INTERESTED WOULD YOU BE IN PAYING FOR SUBSCRIBER ONLY BONUS EPISODES TO ANY OF THE PODCASTS YOU LISTEN TO OR MIGHT DISCOVER IN THE FUTURE?

Posed to podcast listeners.



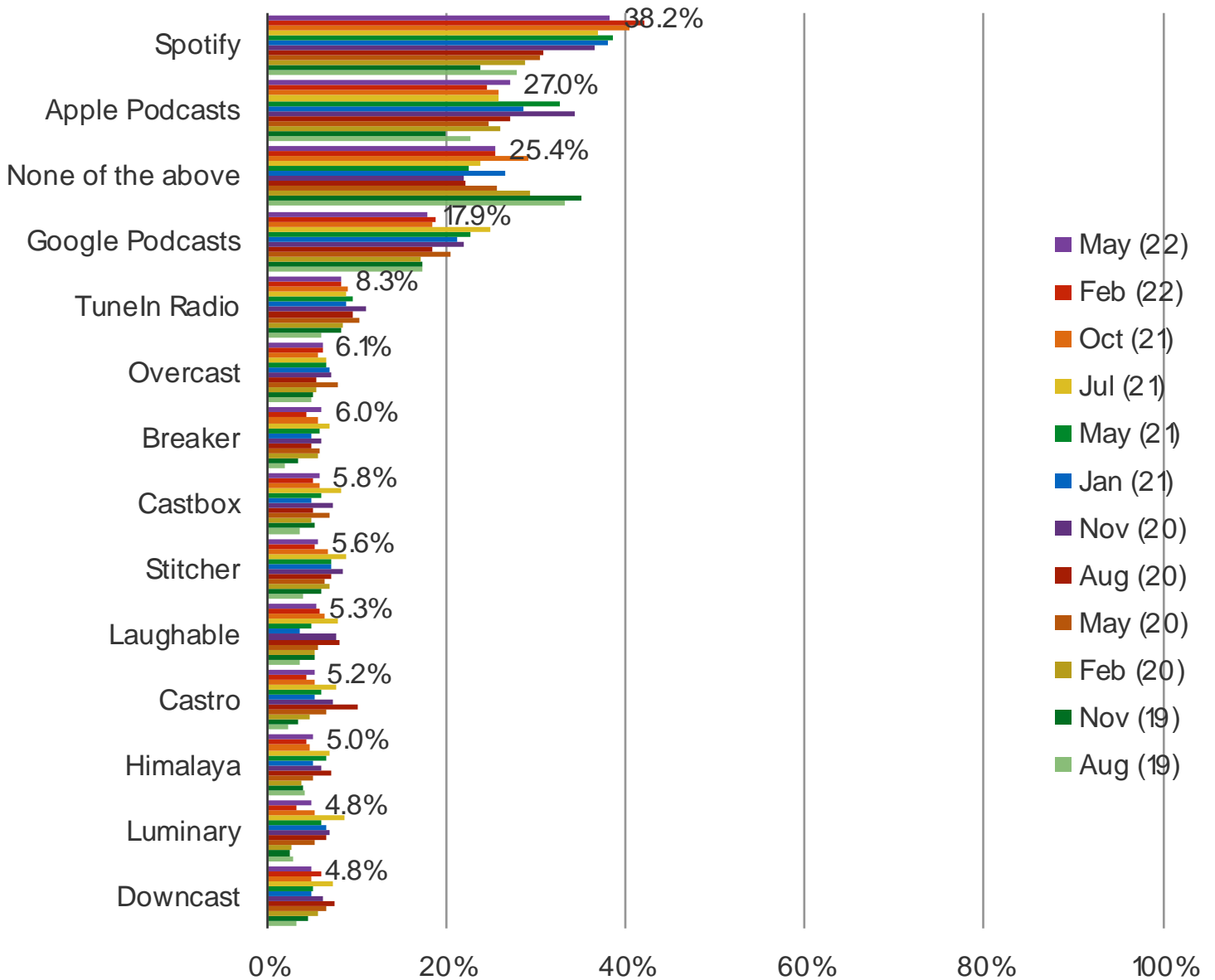
DO YOU LISTEN TO ANY PODCASTS NOW THAT YOU WOULD BE WILLING TO PAY FOR SUBSCRIBER ONLY BONUS EPISODES?

Posed to podcast listeners.



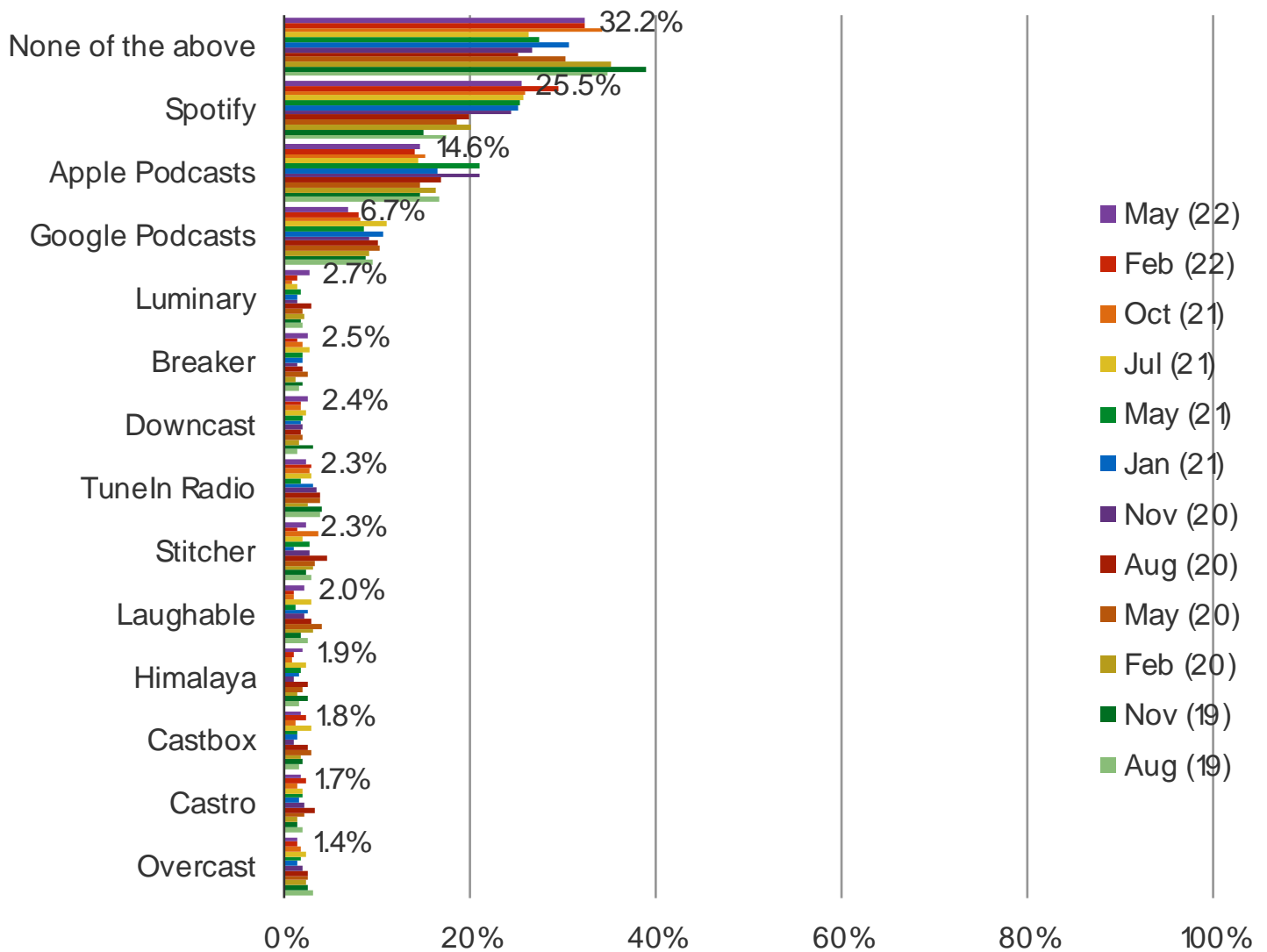
WHICH OF THE FOLLOWING PLATFORMS DO YOU USE TO LISTEN TO PODCASTS?

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



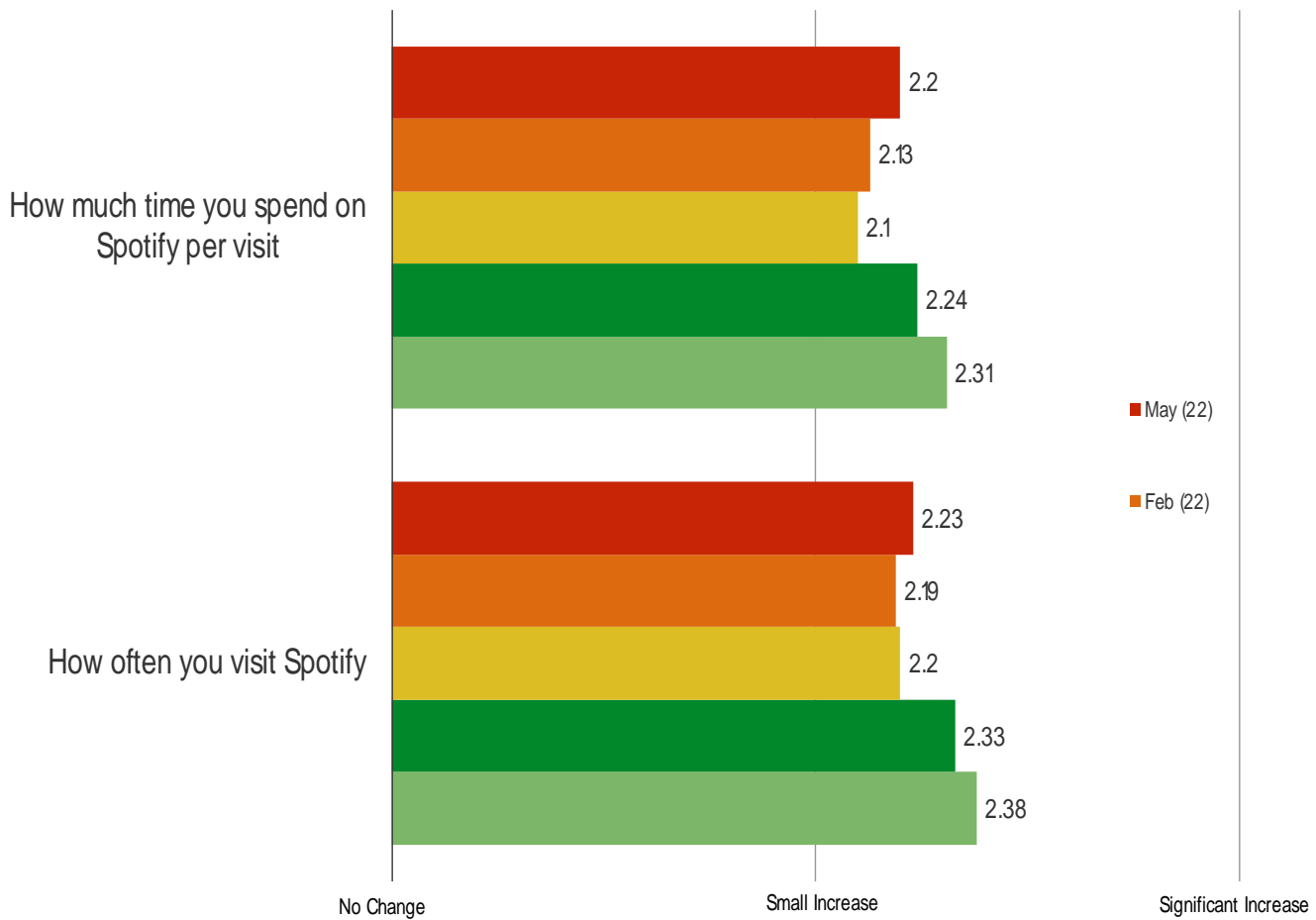
WHICH OF THE FOLLOWING HAS THE MOST UNIQUE PODCAST CONTENT THAT YOU CANNOT FIND ON OTHER PLATFORMS?

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...

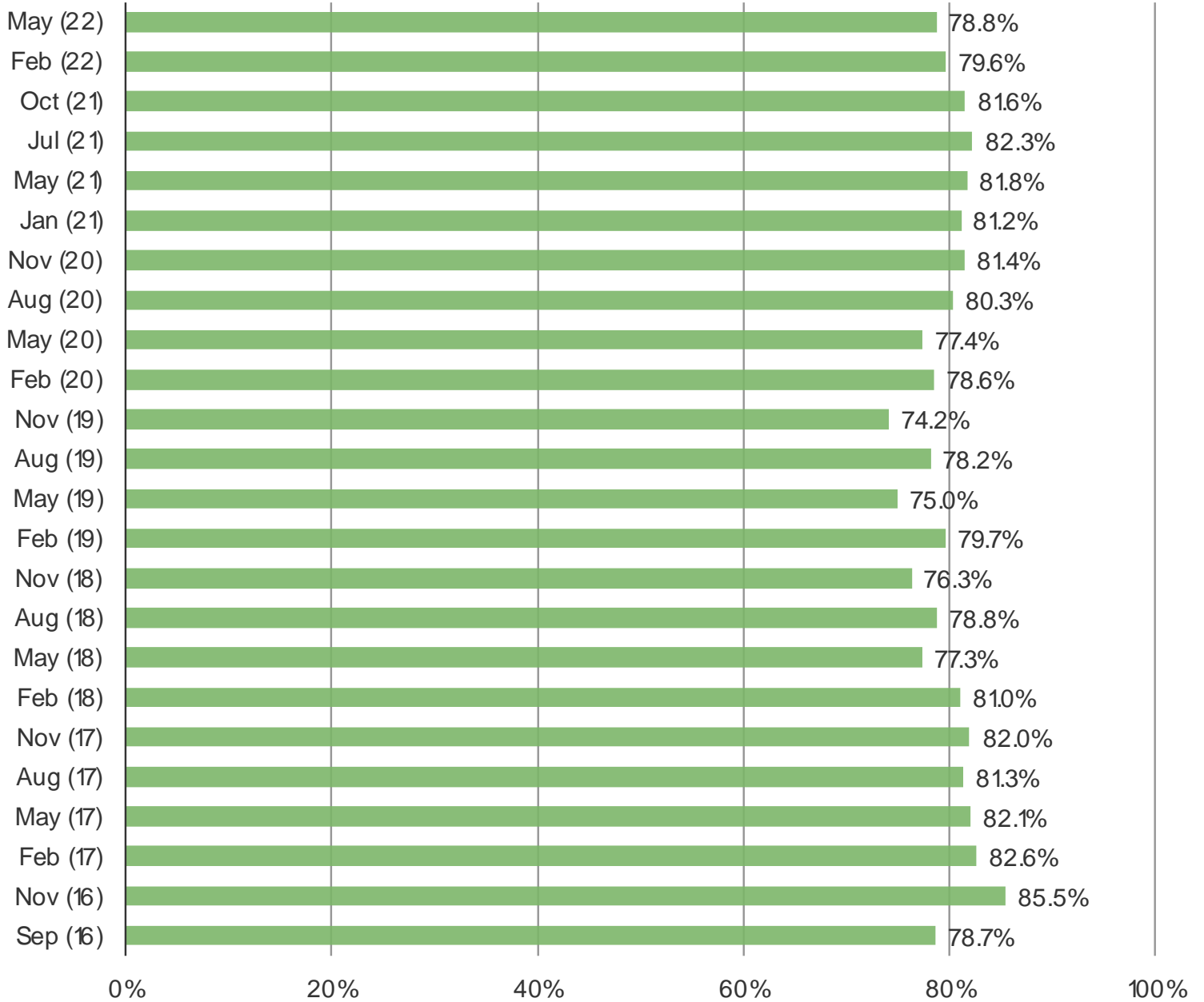
Posed to respondents who listen to Joe Rogan at least somewhat frequently



CONNECTED CAR

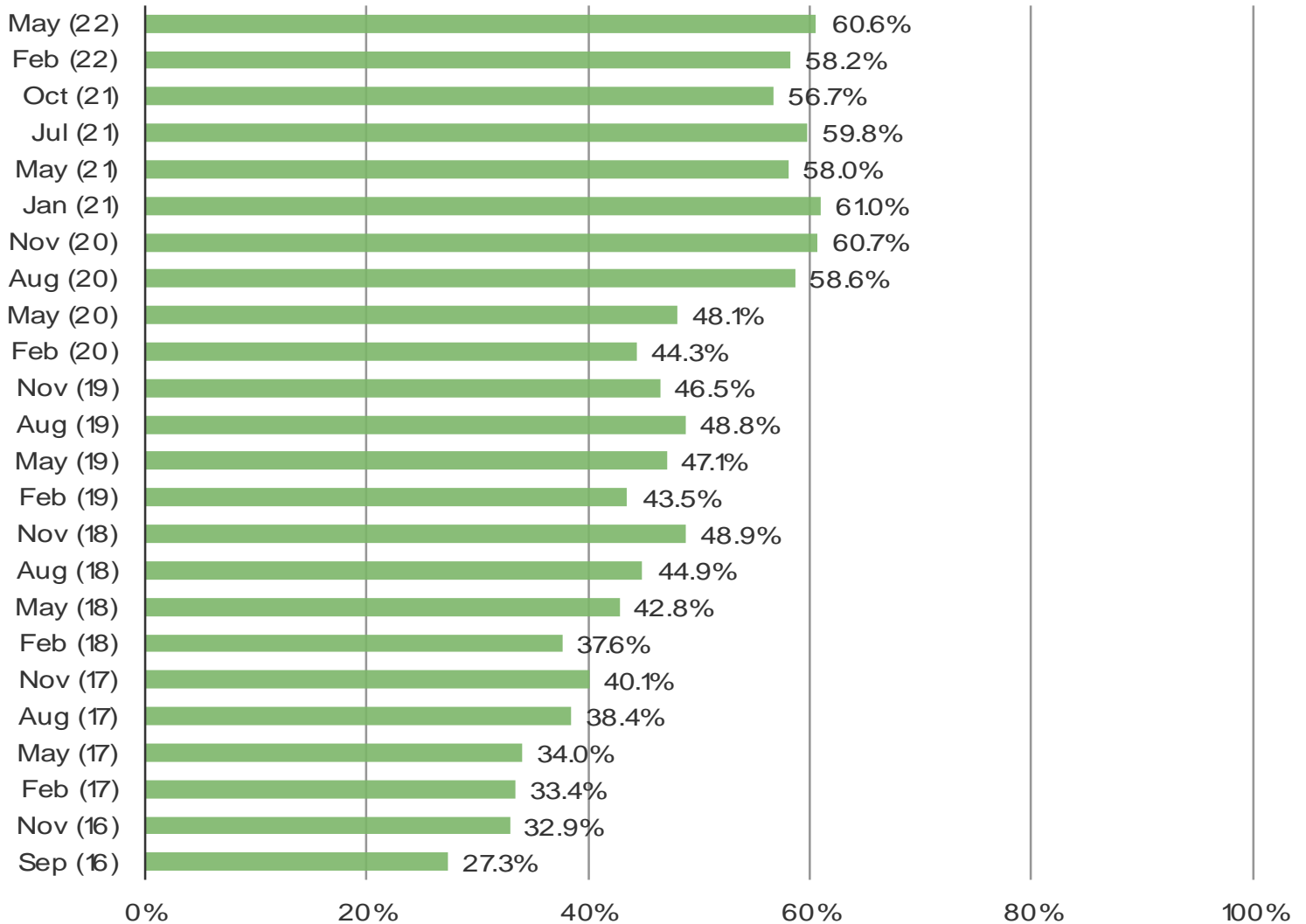
OWNS OR LEASES A CAR

Posed to all respondents



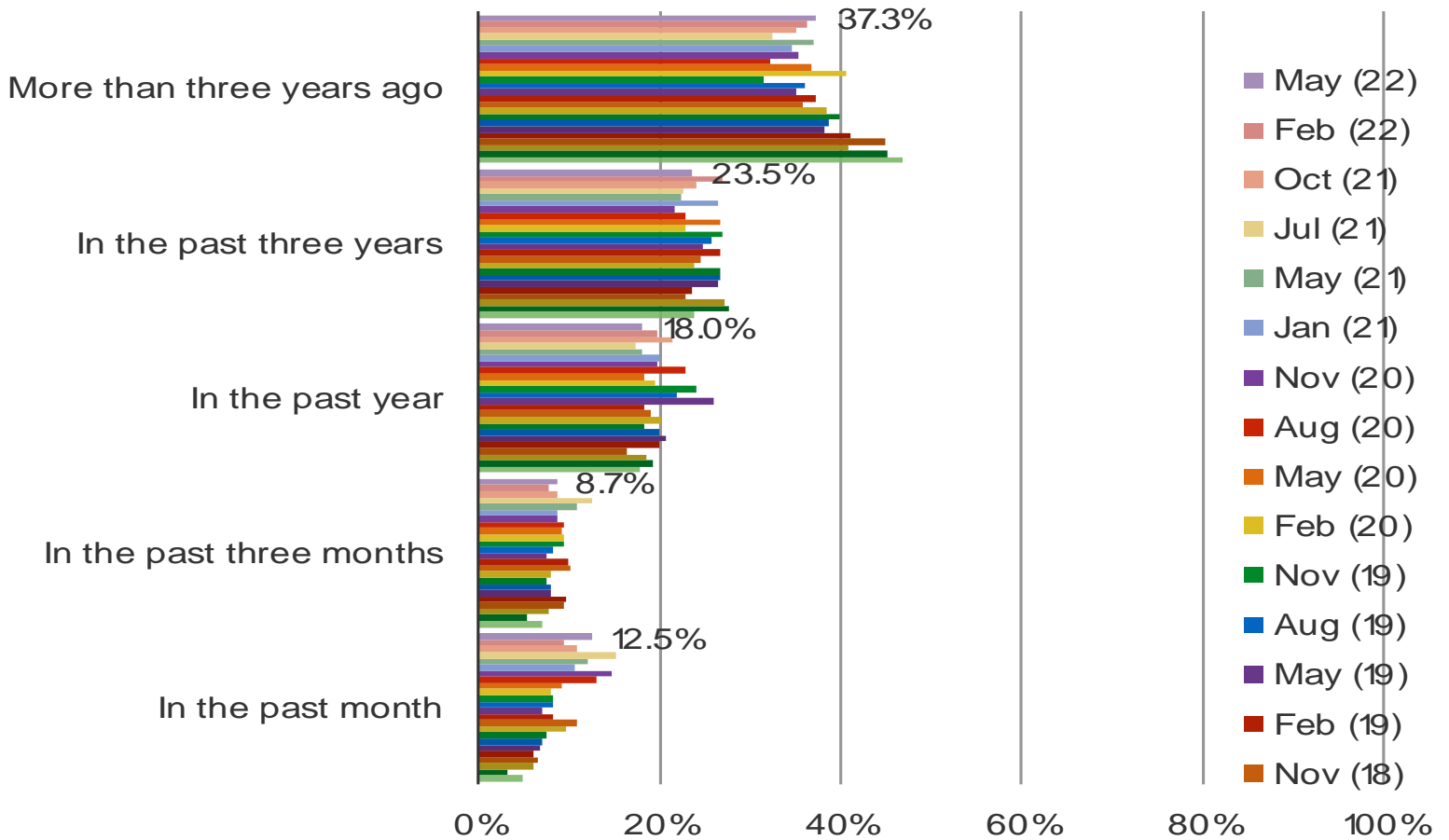
DO YOU EVER CONNECT A SMARTPHONE TO LISTEN TO MUSIC APPS IN YOUR CAR LIKE SPOTIFY, PANDORA, APPLE MUSIC, ETC?

Posed to all respondents who own / lease a car



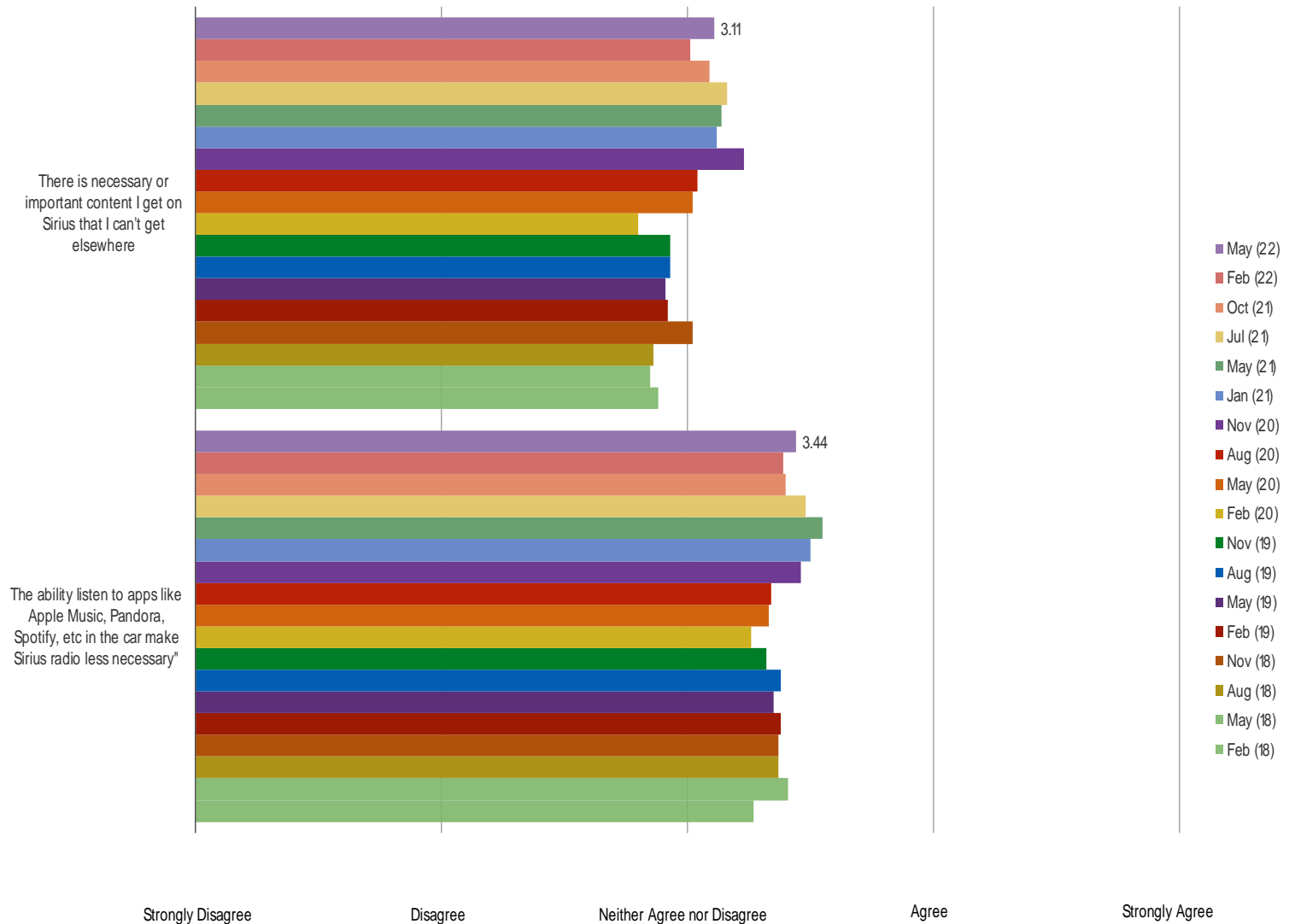
WHEN IS THE LAST TIME YOU PURCHASED OR LEASED A CAR?

Posed to all respondents who own / lease a car



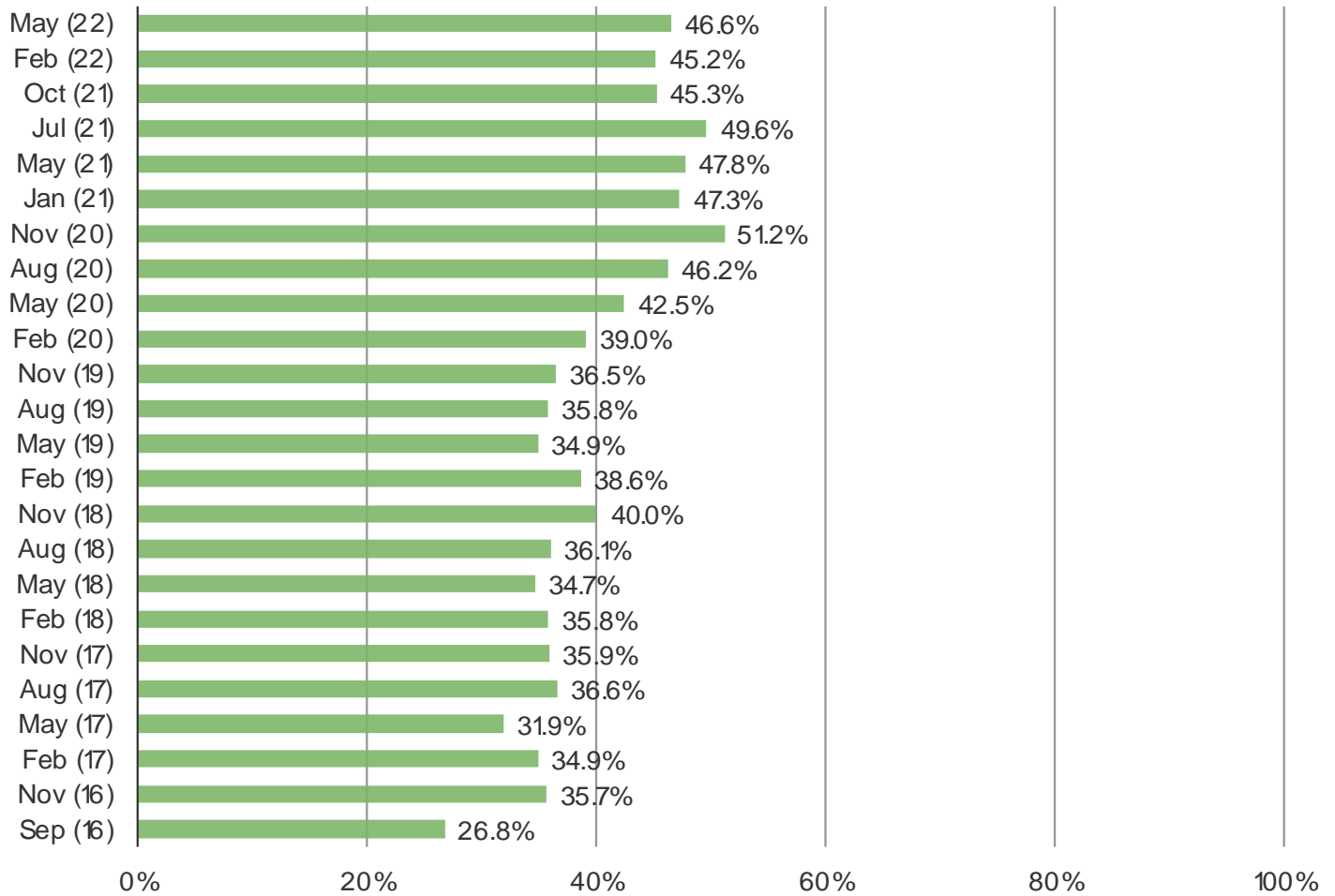
HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS:

Posed to all respondents who own / lease a car



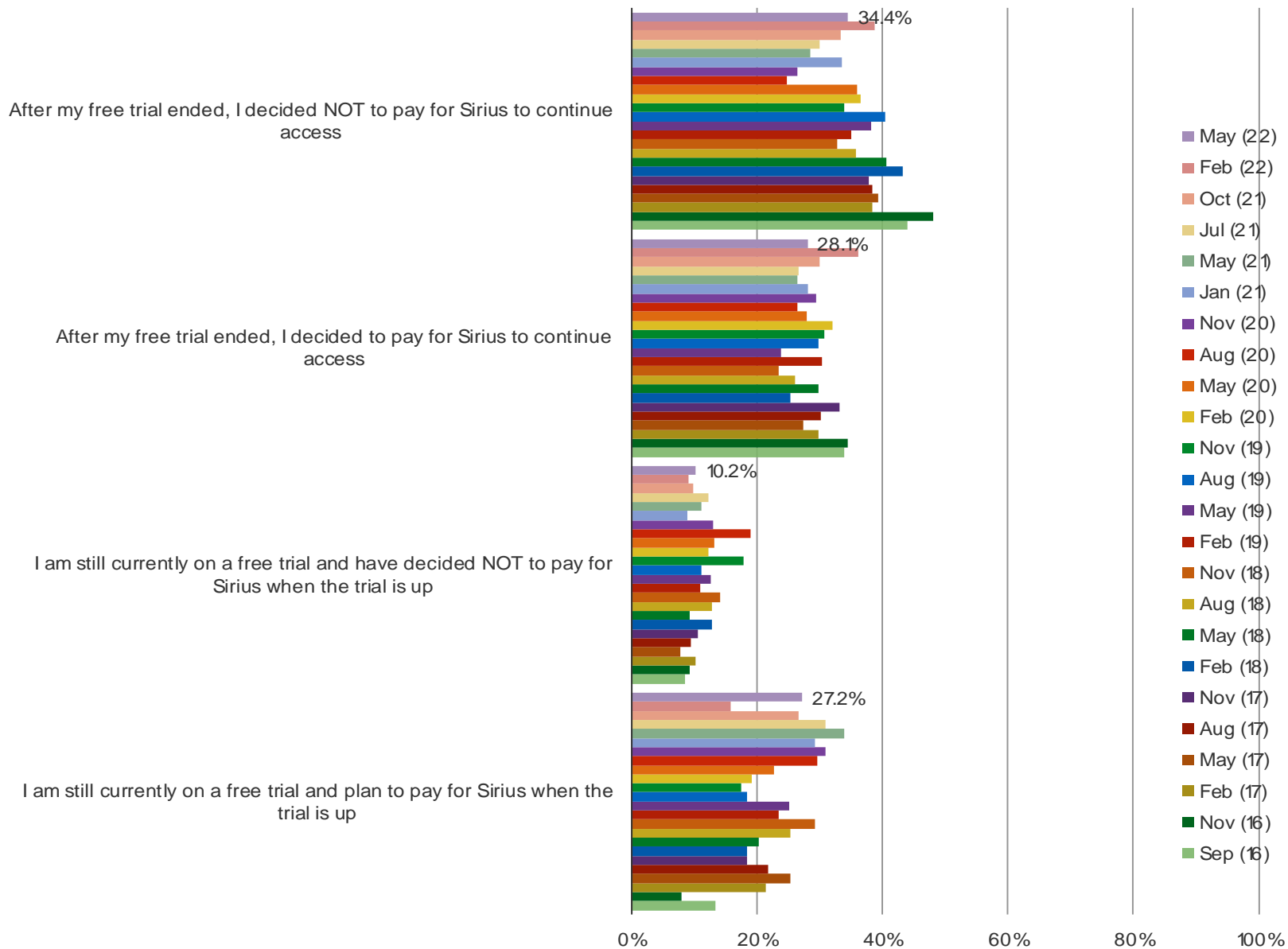
WHEN YOU MOST RECENTLY LEASED OR BOUGHT A CAR, DID IT COME WITH A FREE TRIAL TO SIRIUS RADIO?

Posed to all respondents who own / lease a car



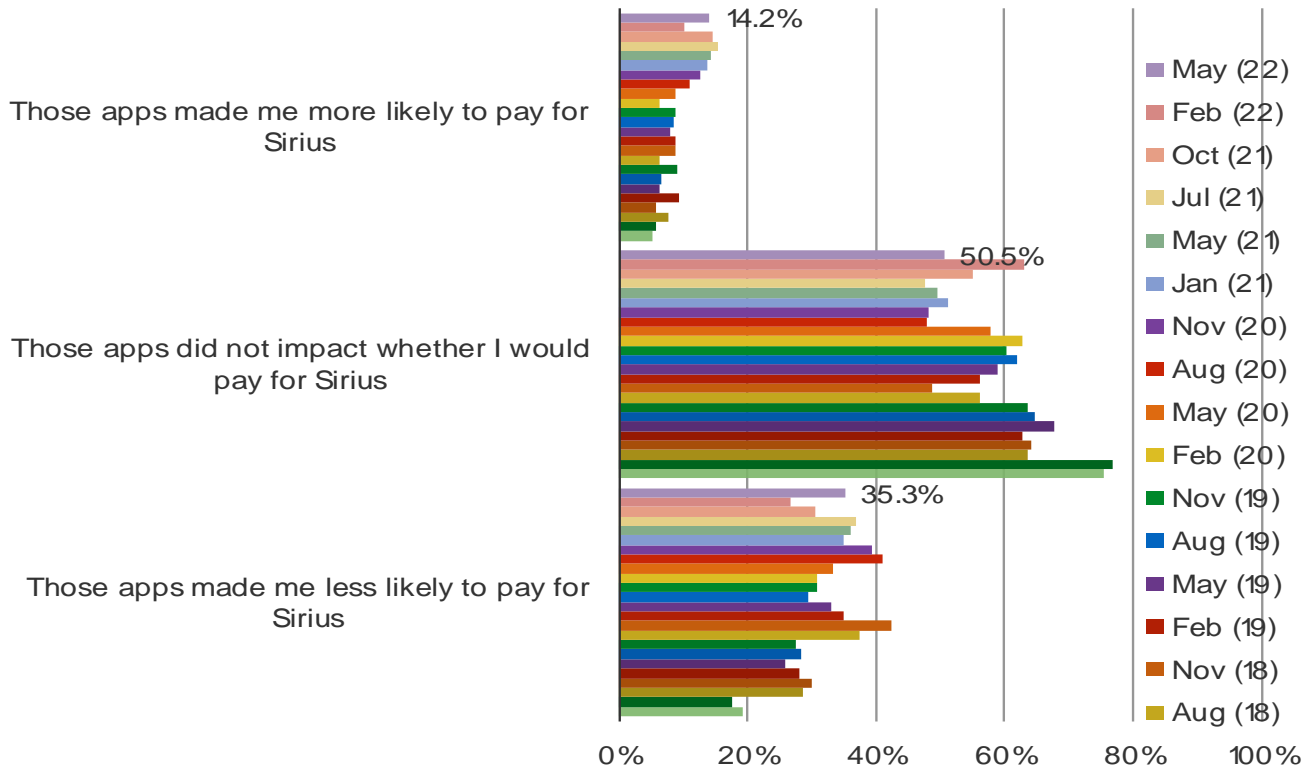
WHEN THE FREE TRIAL WAS UP, WHAT DID YOU DO?

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?

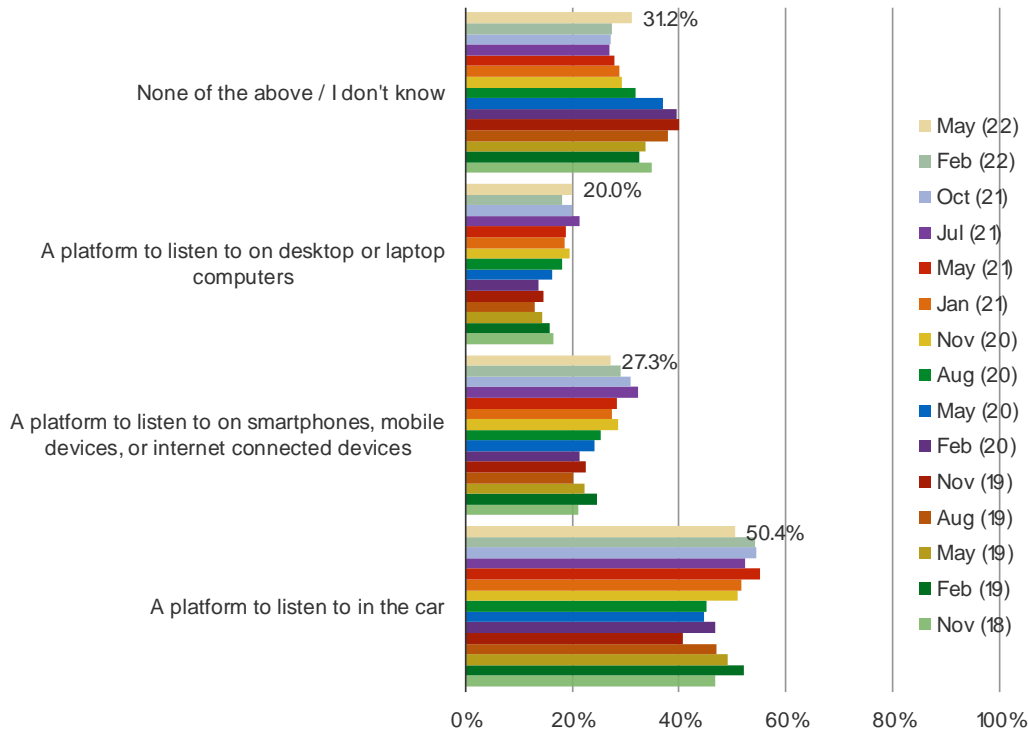
Posed to respondents who had/have a free trial when they most recently got a new car.



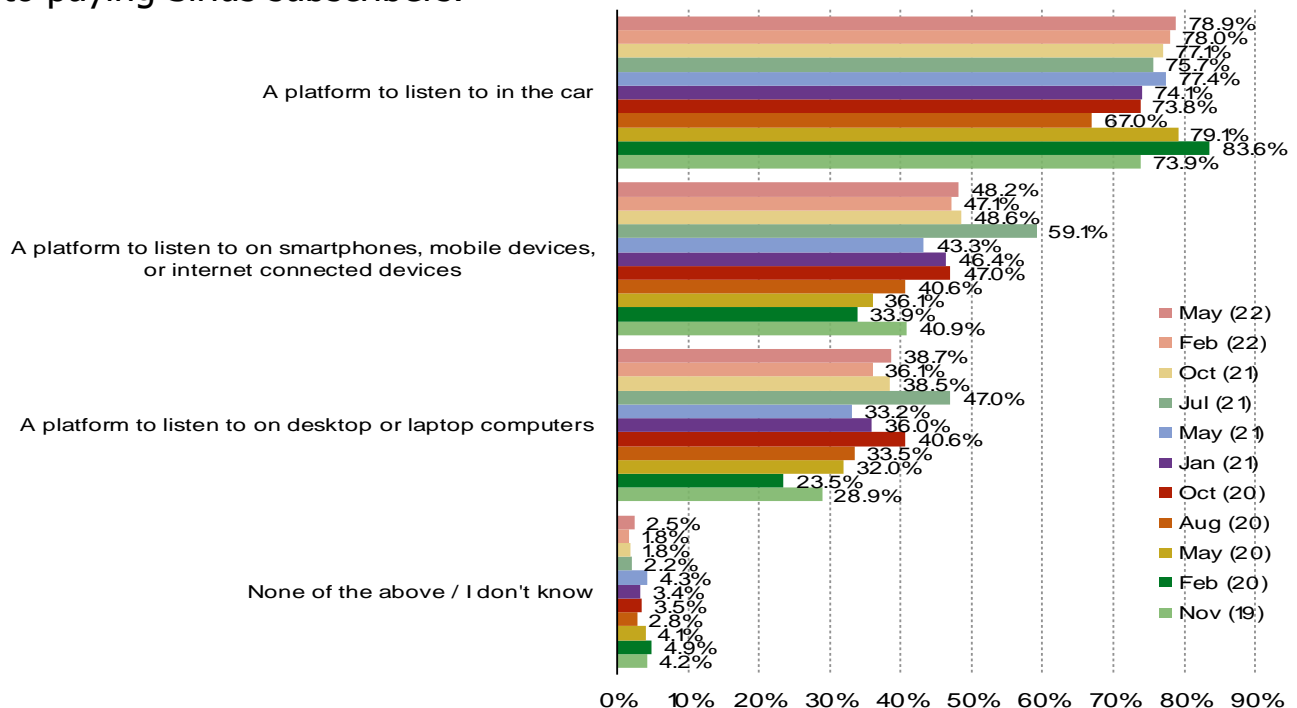
SIRIUS XM

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

Posed to all respondents.

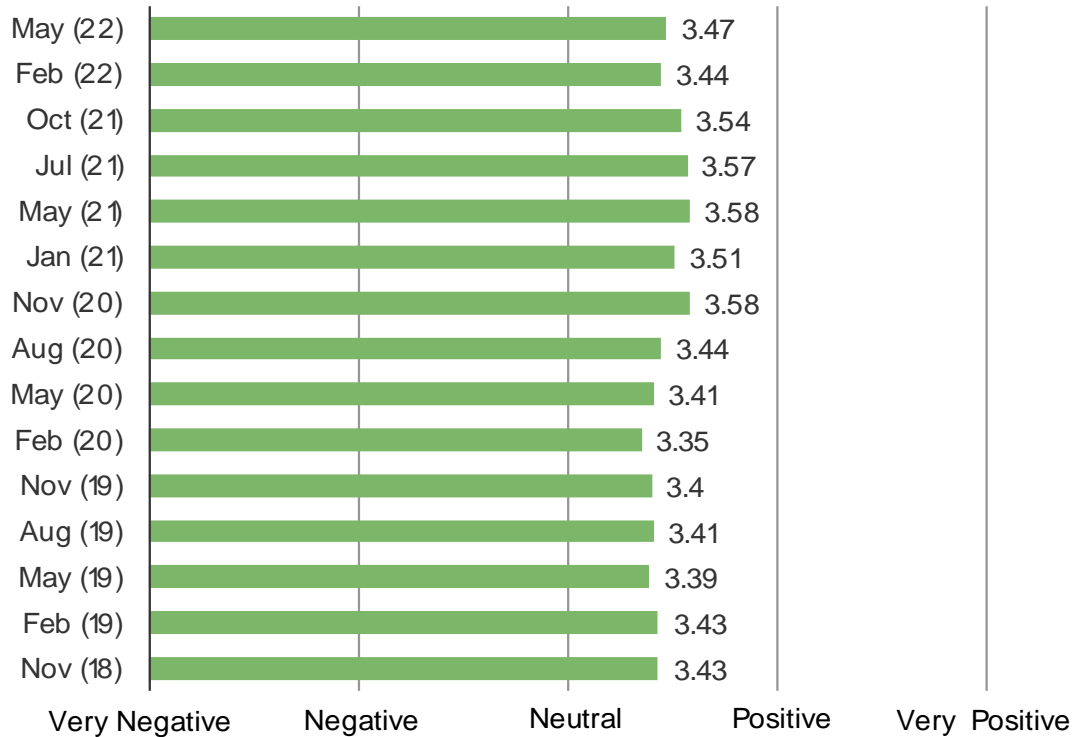


Posed to paying Sirius subscribers.

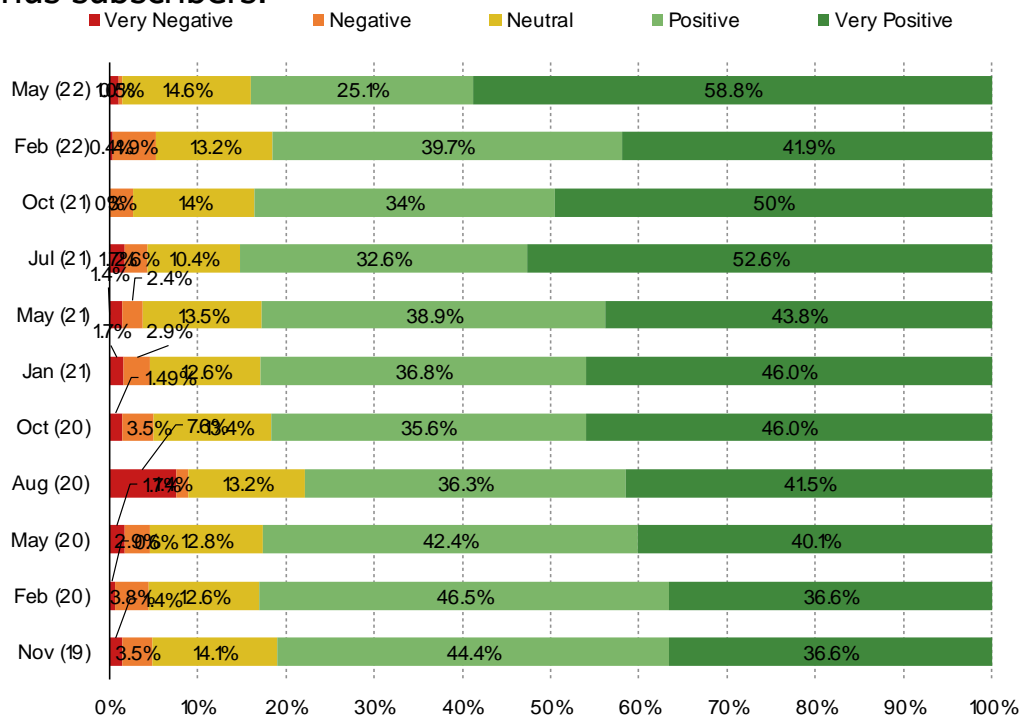


WHAT IS YOUR PERCEPTION OF SIRIUS XM?

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.

Cost and limited selection

The sound quality is horrendous even after many years

Waste of money

Outdated

I do not see a point in buying it

Because of their prices

Because the price is way to high

It's a lot of money just for some music

The price

I think it offers poor content

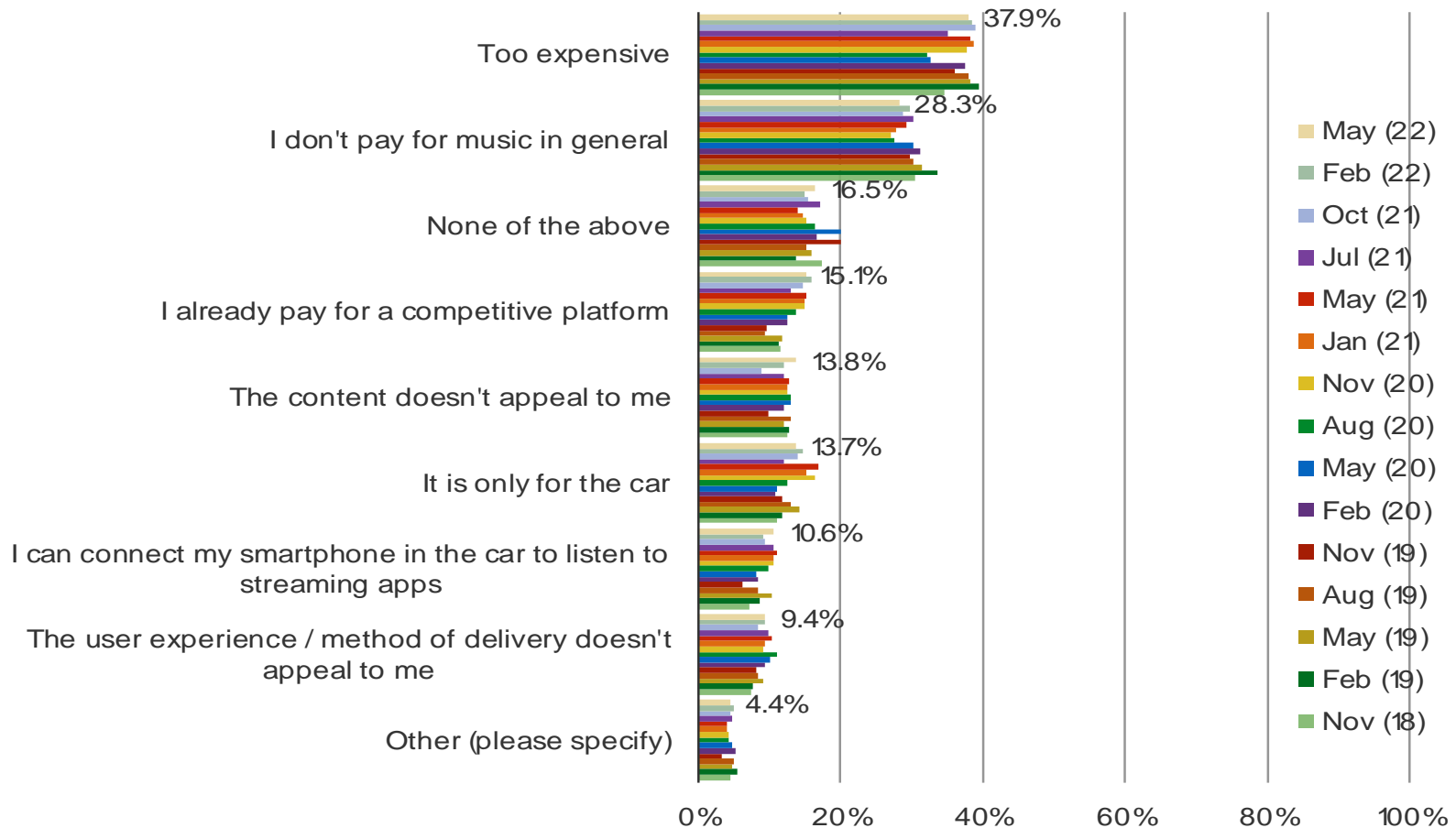
I don't like the responsibility to have to shut off pay if I don't want to keep subscribing

They engage in deceptive advertising.

Way too much money for 3 shows a week from Howard Stern

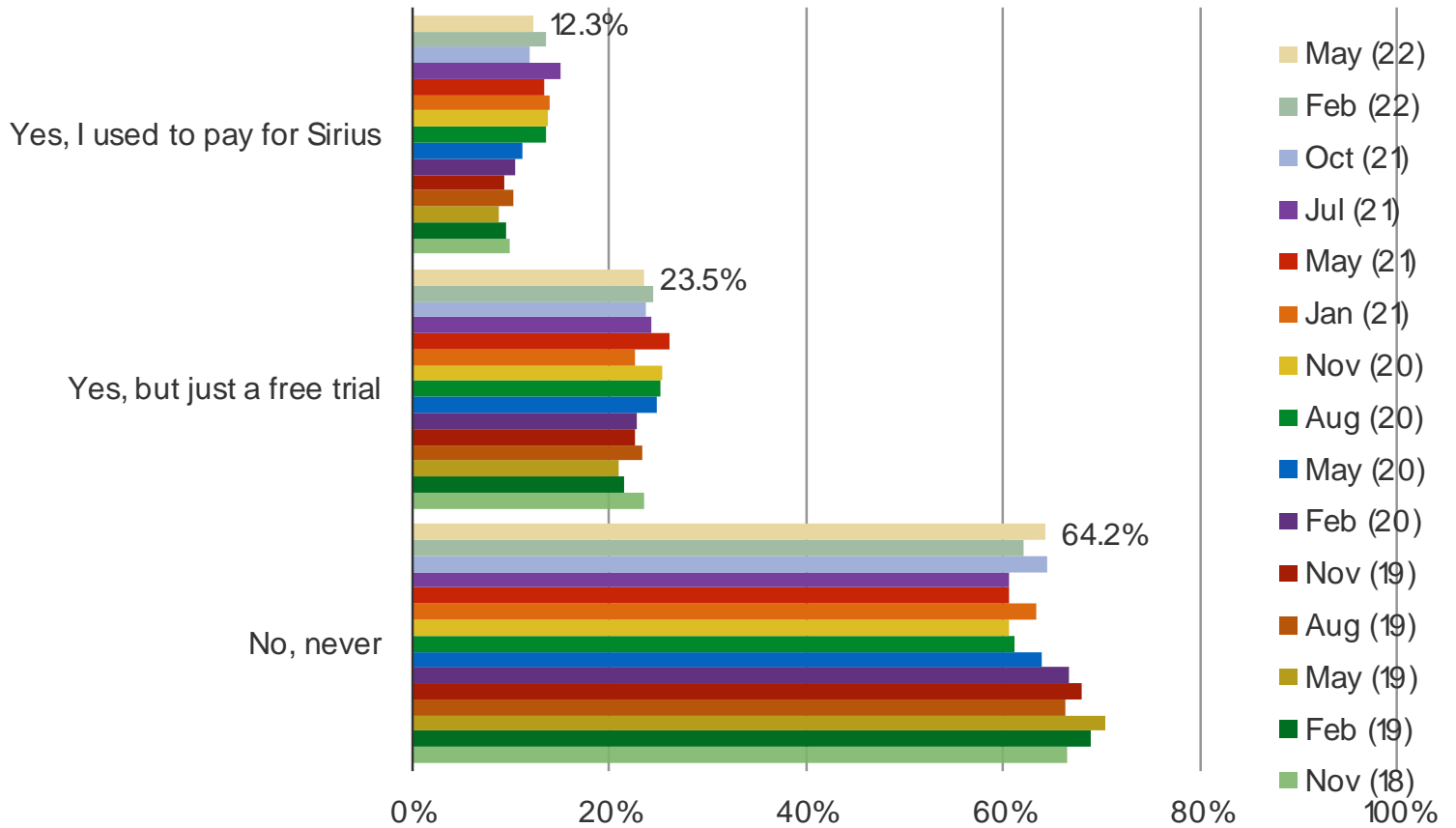
WHY ARE YOU NOT A SIRIUS XM SUBSCRIBER? (SELECT ALL THAT APPLY)

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



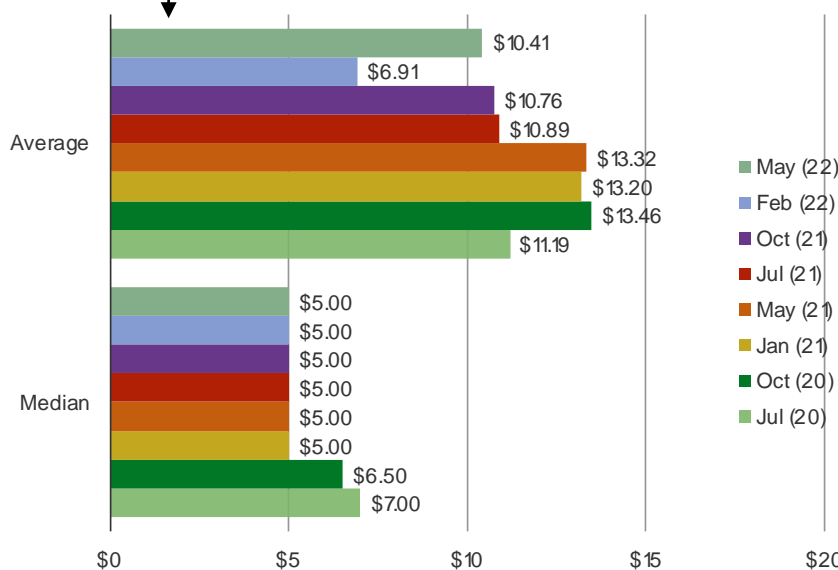
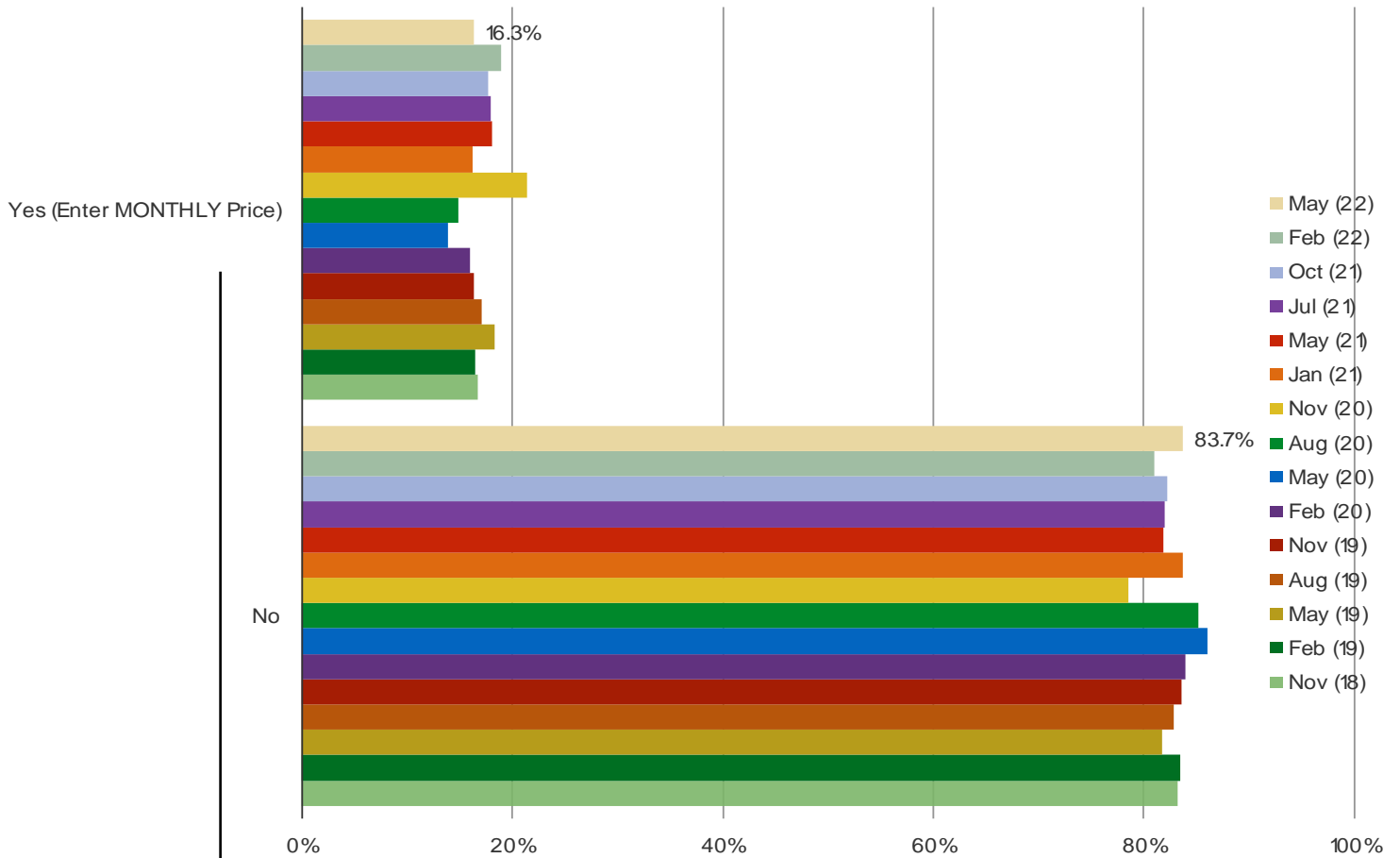
HAVE YOU EVER BEEN A SIRIUS XM SUBSCRIBER?

Posed to non-Sirius XM subscribers.



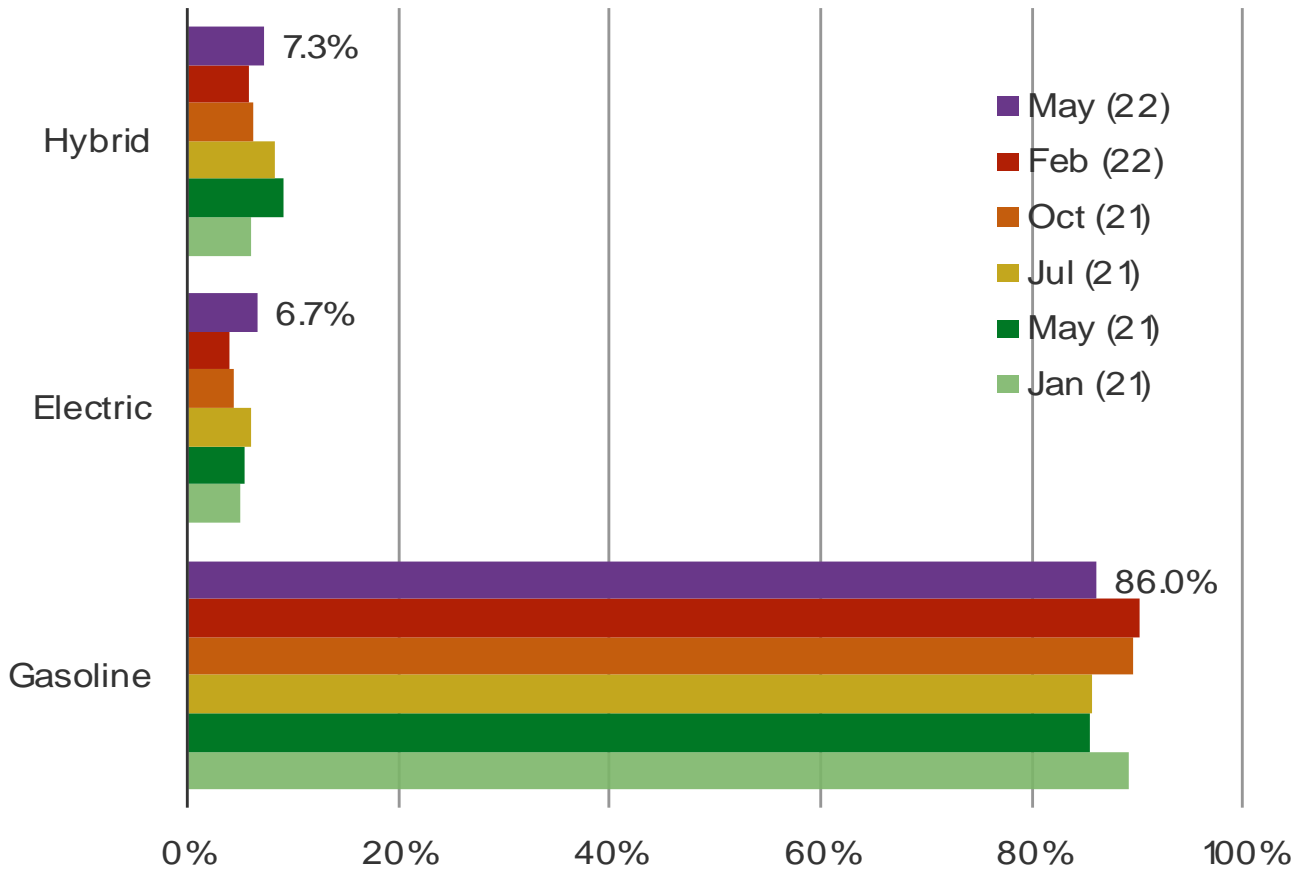
WOULD THERE BE ANY PRICE POINT (PER MONTH) WHERE YOU WOULD DECIDE TO SUBSCRIBE TO SIRIUS XM?

Posed to non-Sirius XM subscribers.



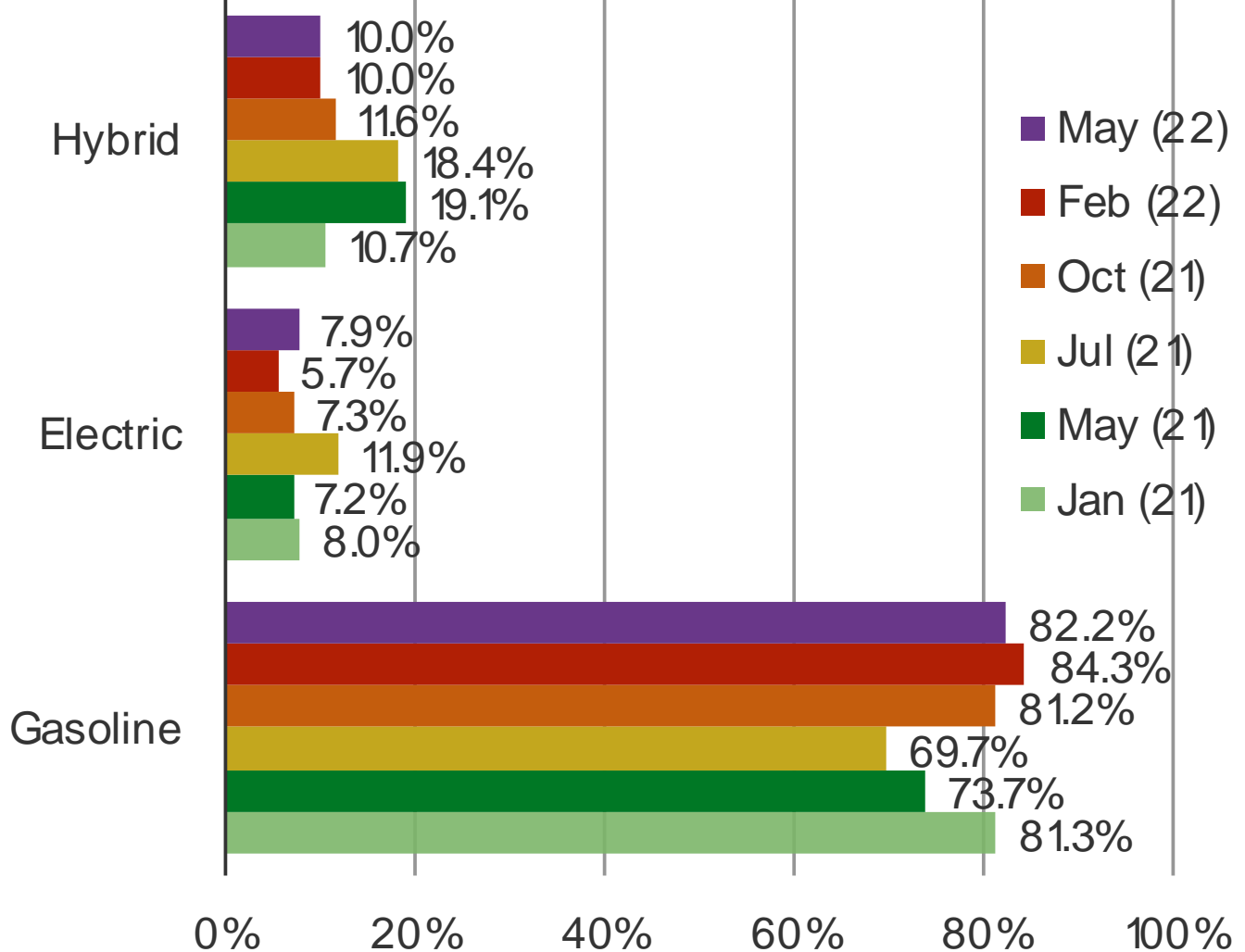
IS YOUR CAR AN ELECTRIC VEHICLE OR DOES IT RUN ON GAS?

Posed to auto owners.



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

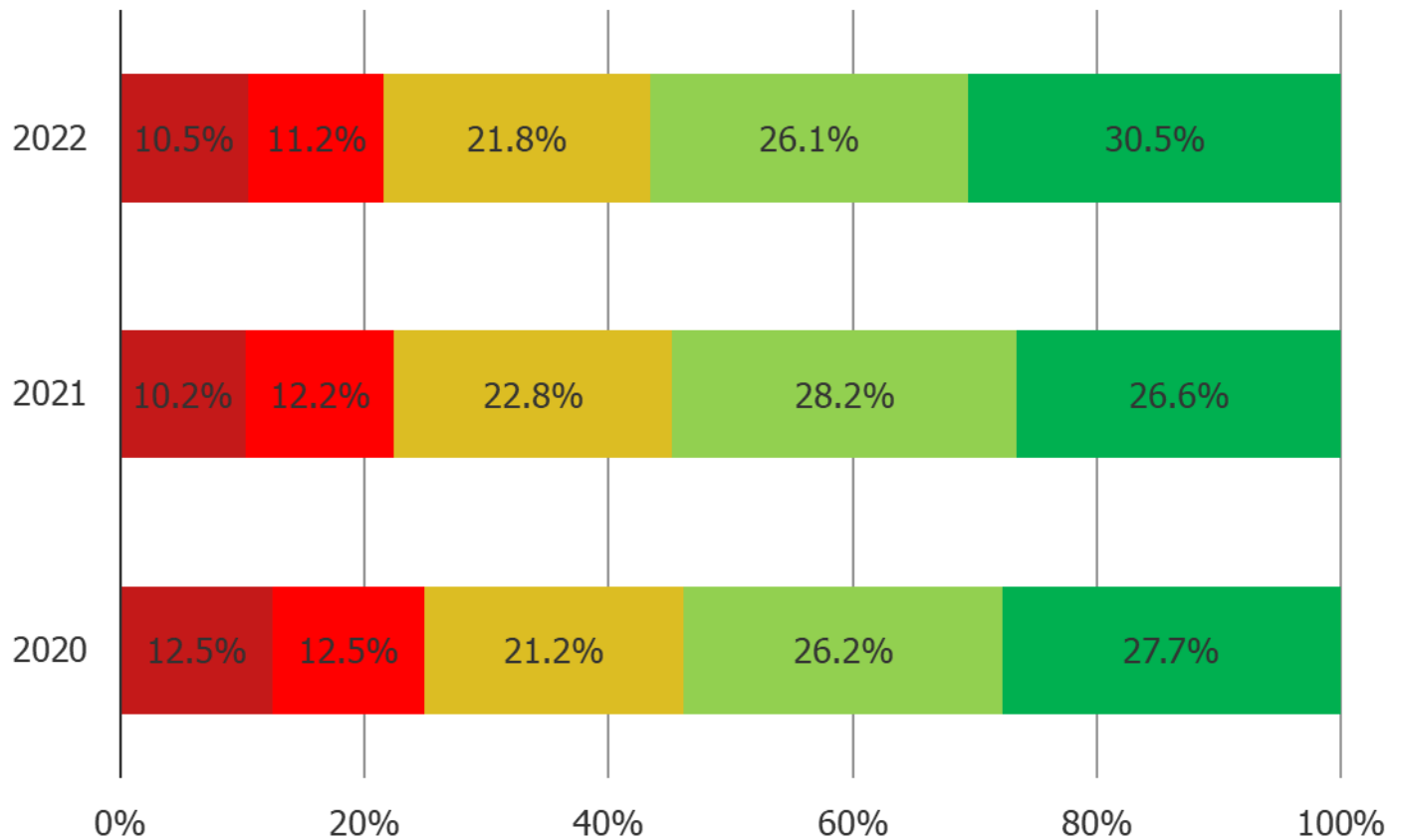
Posed to auto who pay for a Sirius account currently.



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

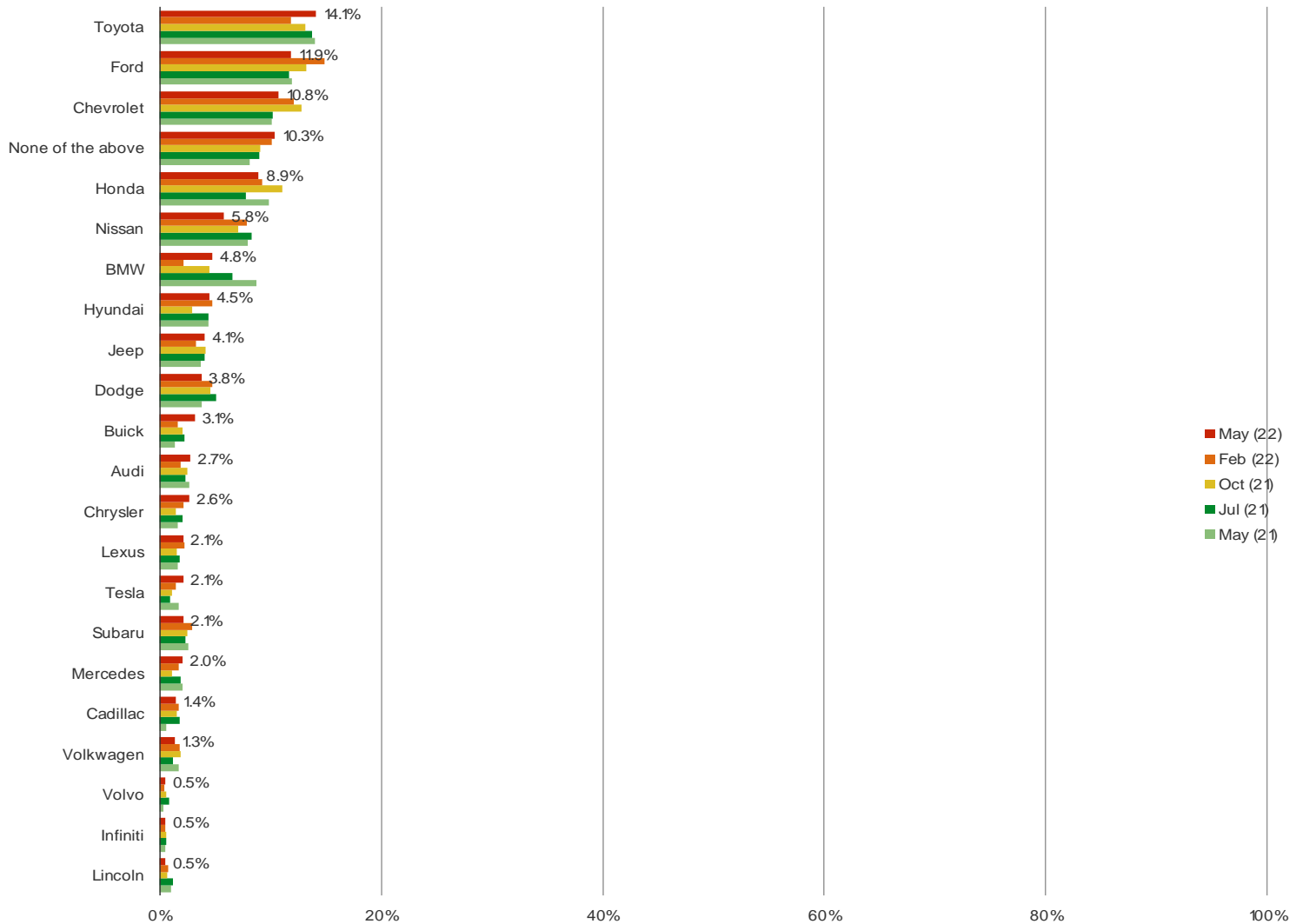
Posed to auto owners.

■ Very Infrequently ■ Infrequently ■ Somewhat Frequently ■ Frequently ■ Very Frequently



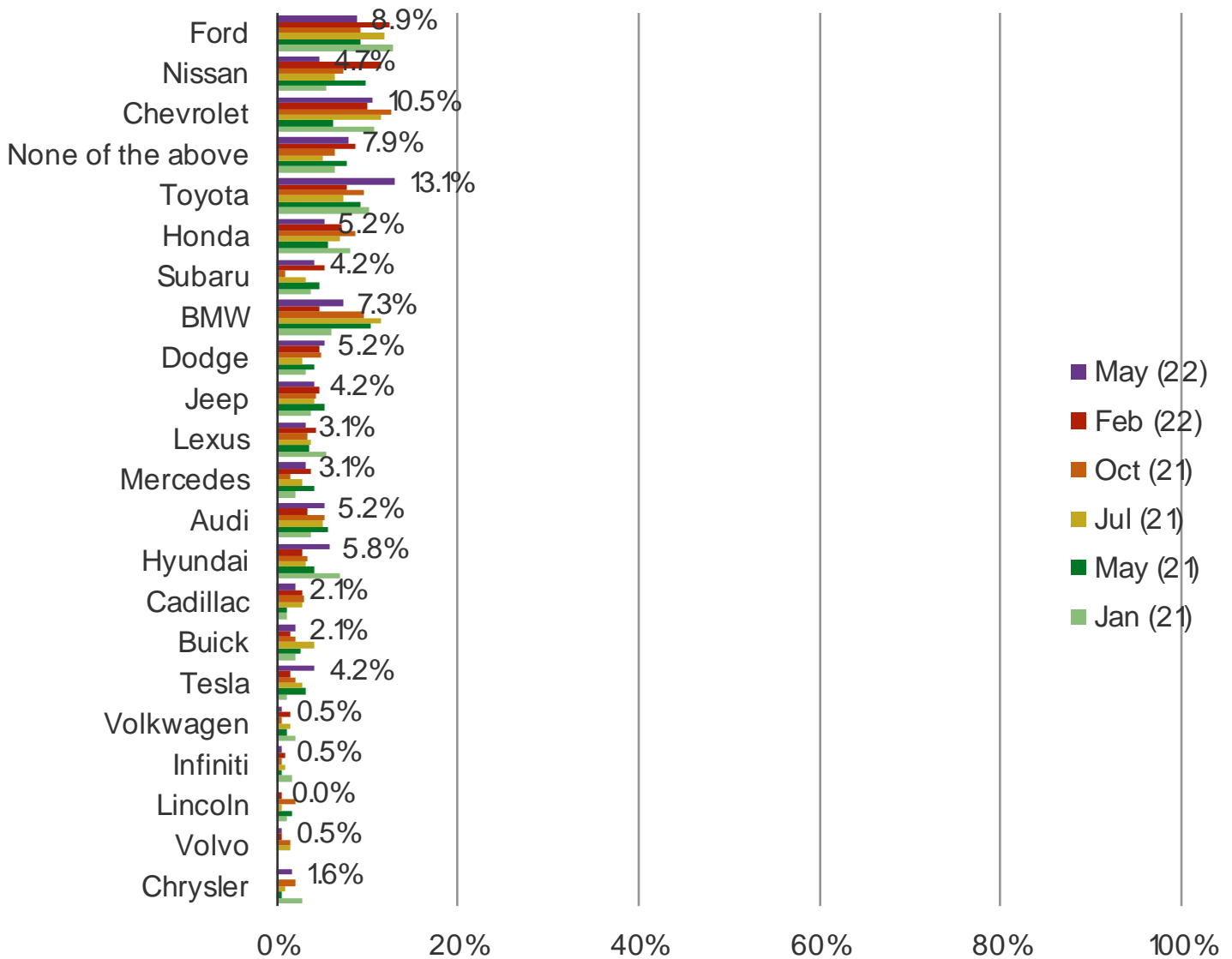
WHAT IS THE BRAND OF THE PRIMARY AUTOMOBILE THAT YOU DRIVE?

Posed to auto owners.



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

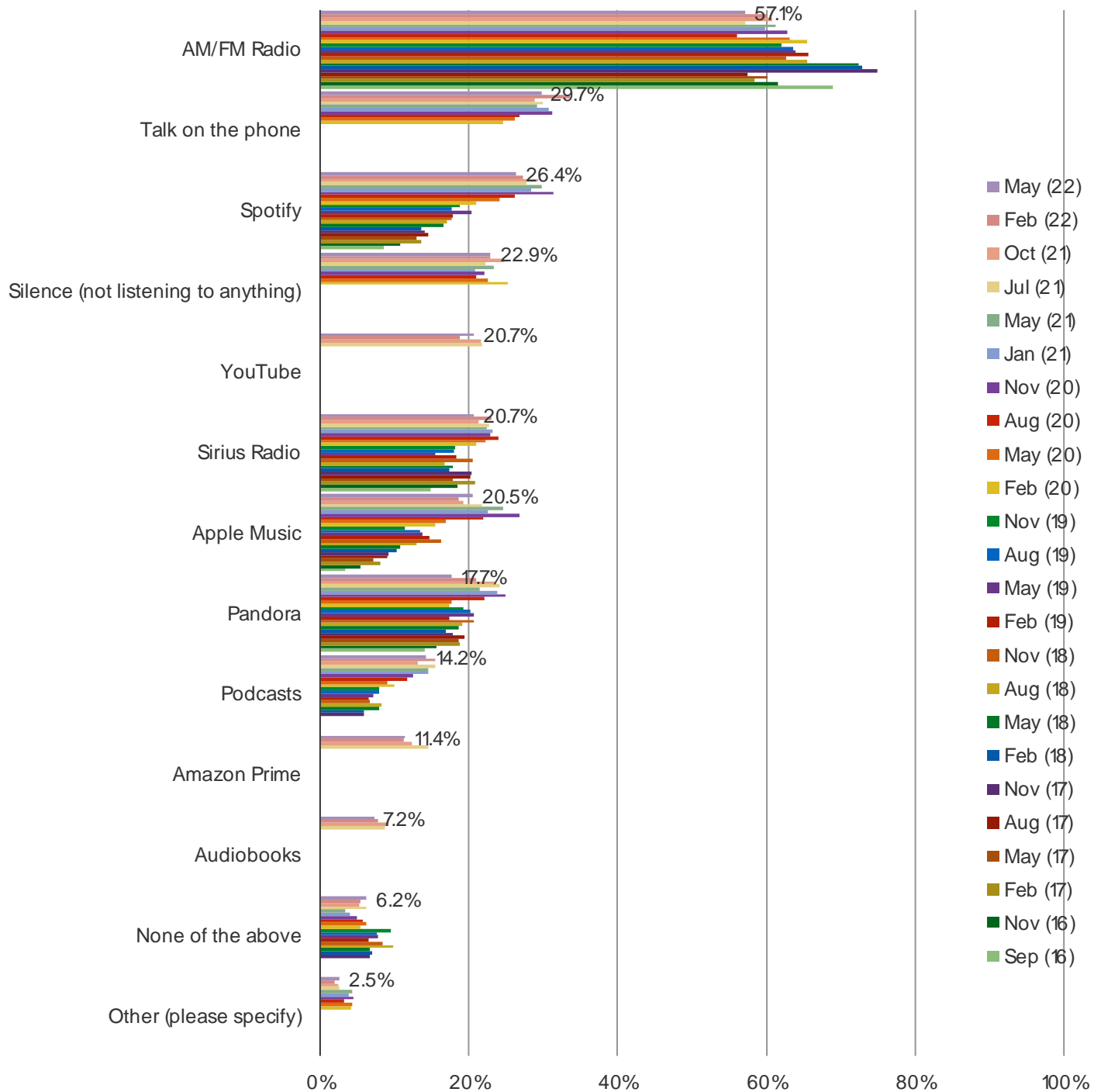
Posed to auto who pay for a Sirius account currently.



MARKET SHARE IN THE CAR

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

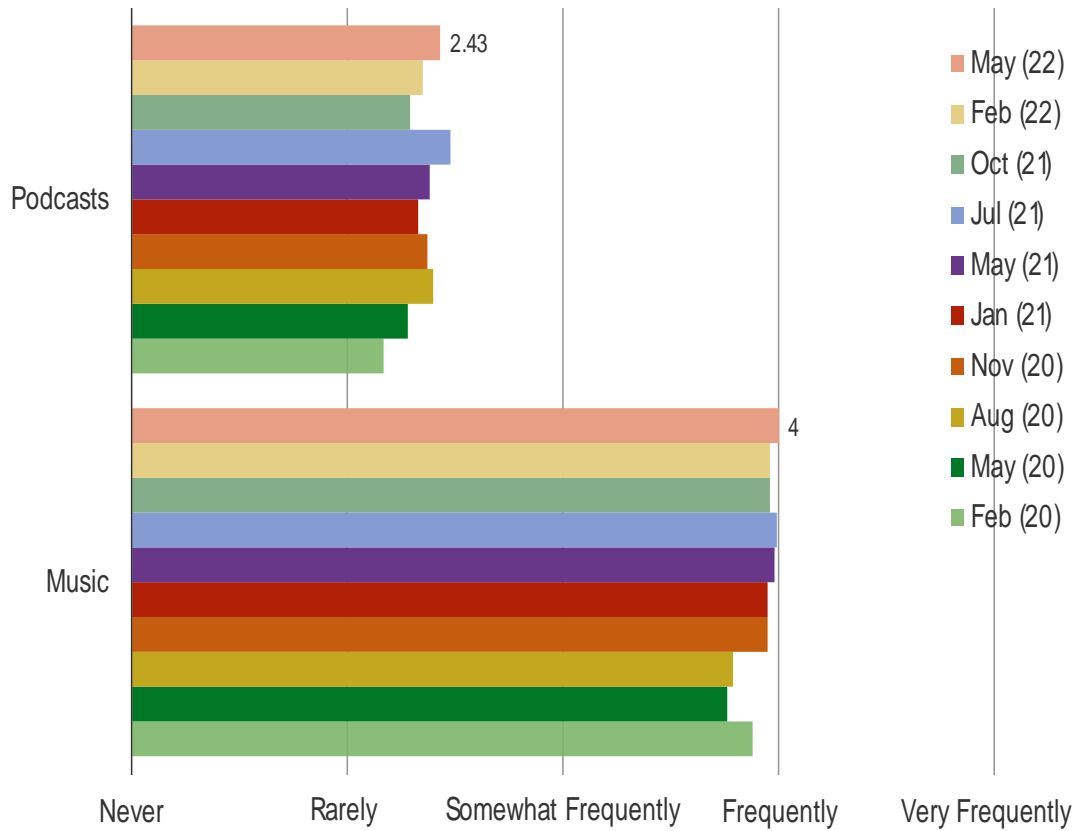
Posed to all respondents who own / lease a car



AIRPODS

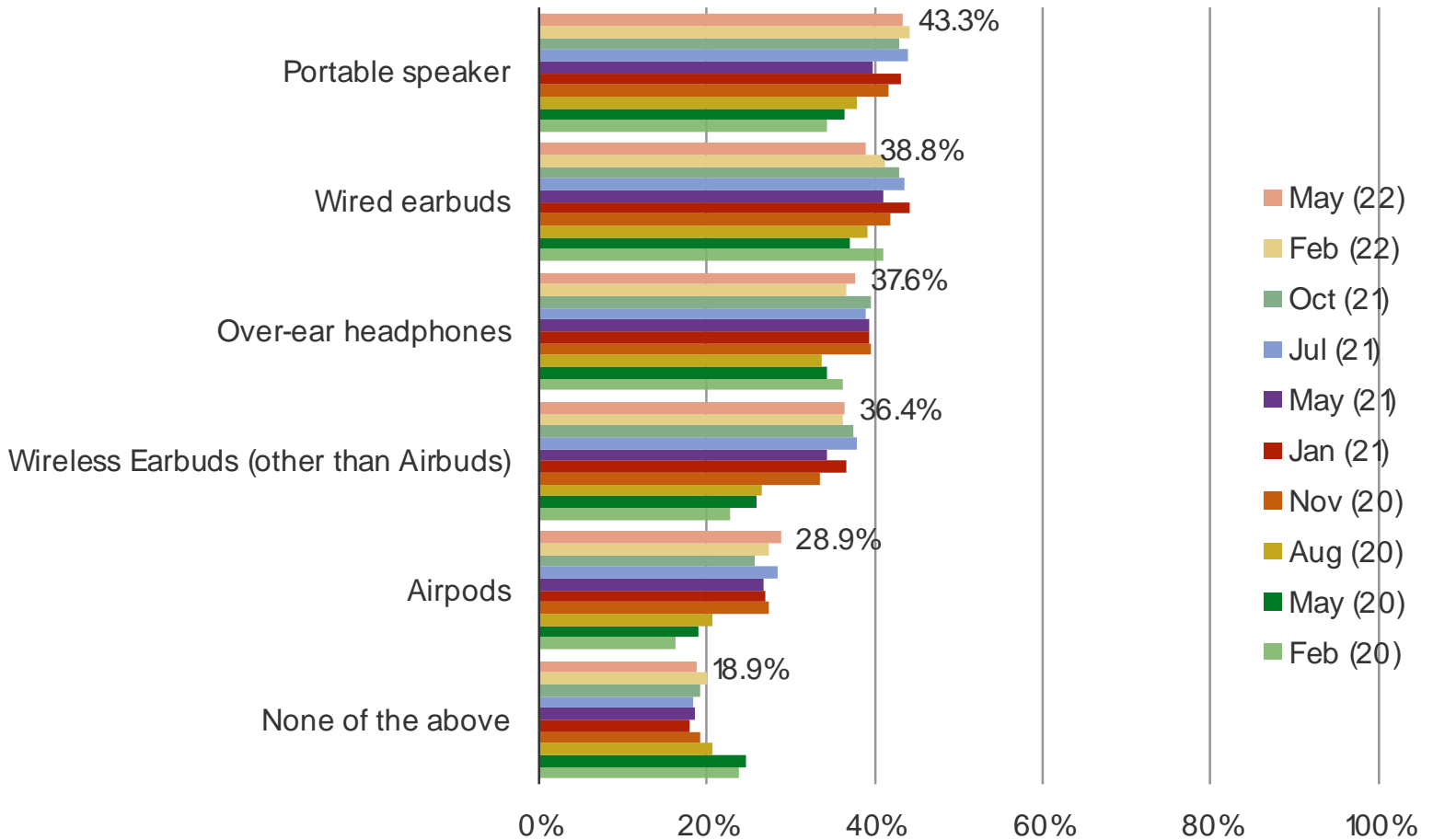
HOW OFTEN DO YOU LISTEN TO...

Posed to all respondents



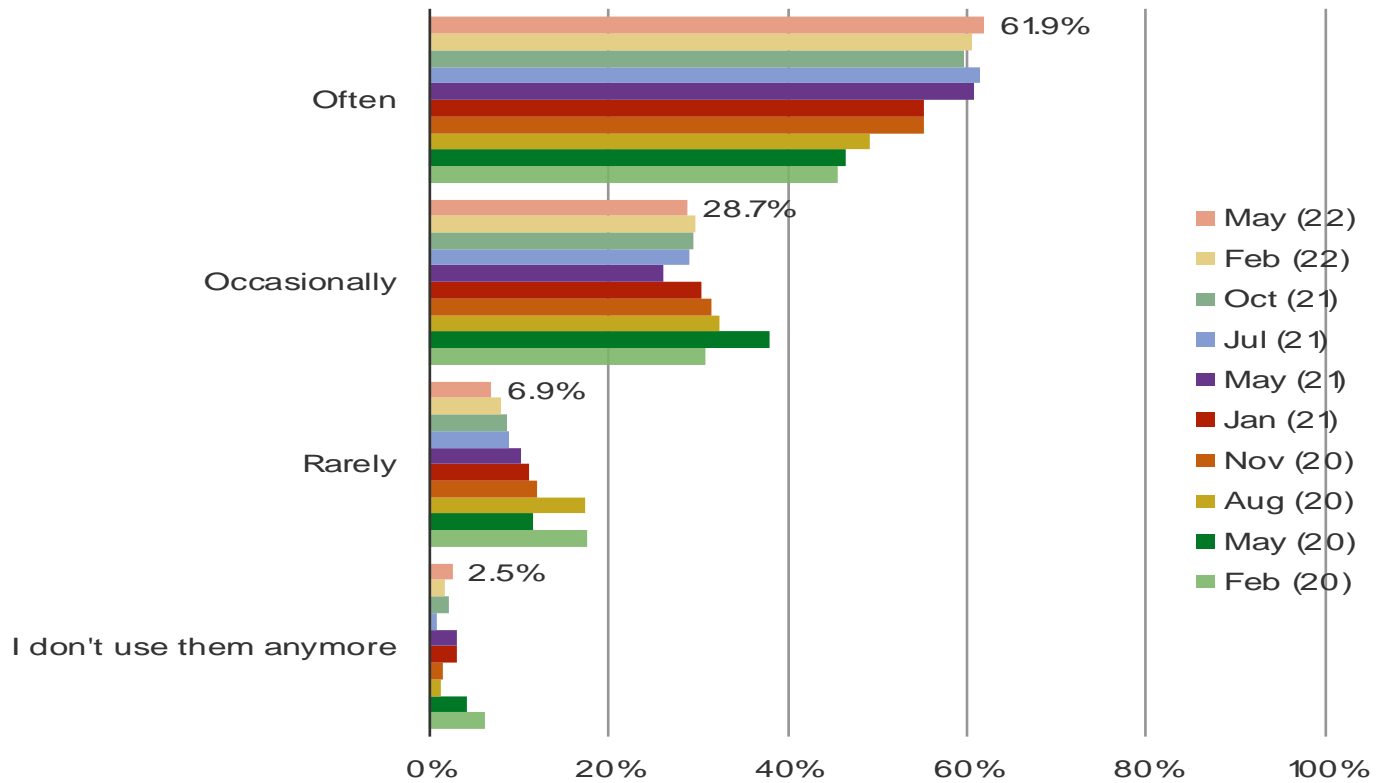
DO YOU OWN ANY OF THE FOLLOWING?

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

