

BESPOKE SURVEYS

Audio Volume 24

SPOT, SIRI, AAPL, AMZN

1,250+ US Consumers, Balanced to Census

CHECK BREAKDOWN:**TREND CHECKS****SOUND QUALITY**

Consumers are generally satisfied with the sound quality across all of the platforms we test (Spotify has a slight edge over peers). There is some demand to pay for high fidelity audio.

AUDIOBOOKS

Nearly 20% of respondents listen to audiobooks frequently or very frequently. When asked about interest in being able to listen to audiobooks on Spotify, roughly 40% of respondents were at least somewhat interested. Streaming music users are much more likely to be audiobook users compared to non-streaming music users (Apple Music and Spotify users are especially likely to be audiobook users relative to peers).

COMPETITIVE DYNAMICS

Spotify remains in the lead when it comes to trust, the overall user experience, and content.

LISTENING PREFERENCES SHIFTS

Preferences continue to shift in the direction of 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 about flat (with readings near series highs).

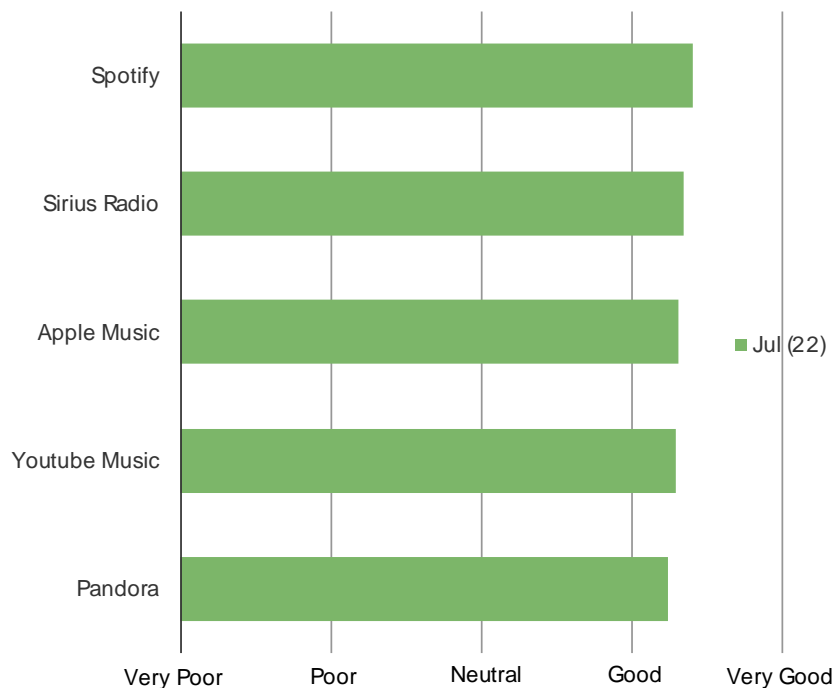
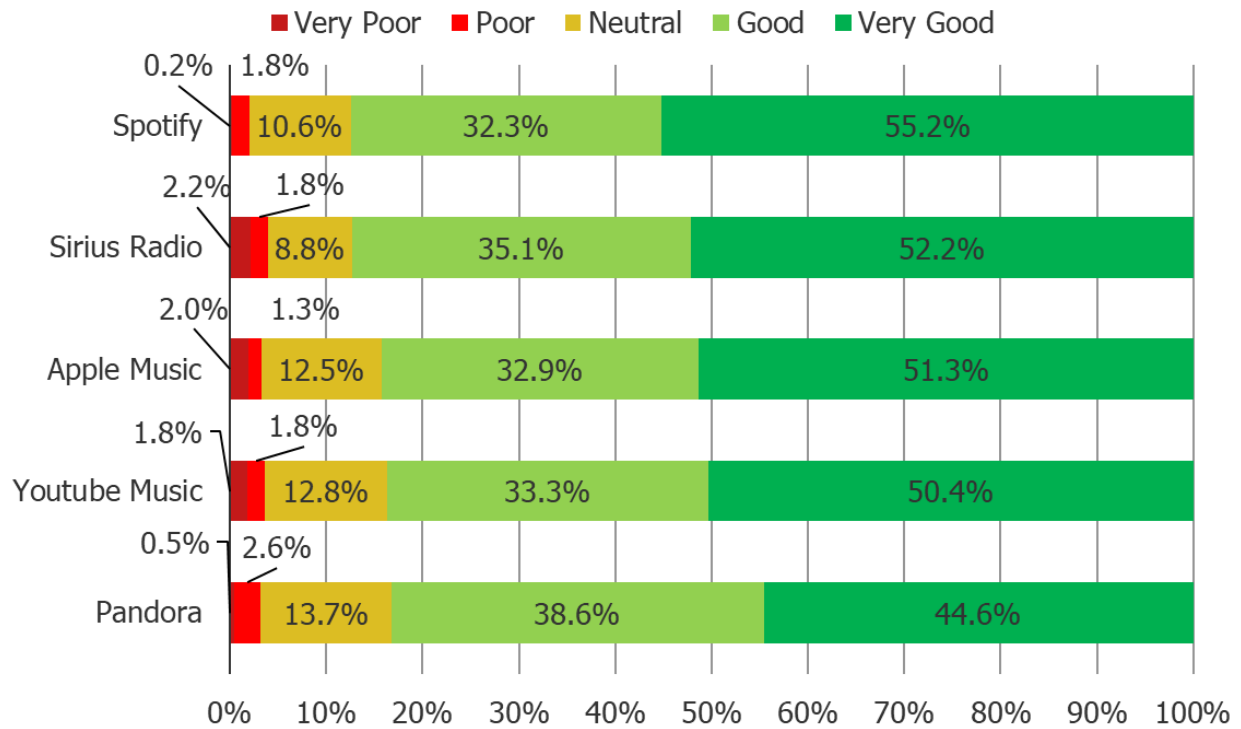
PERCEPTIONS OF SIRI

Most consumers continue to view Sirius as a platform to listen to in the car. We would note that Sirius has an especially strong NPS and tops the peer group that we ask about in our survey.

QUESTIONS ADDED THIS QUARTER

WHAT IS YOUR OPINION OF THE SOUND QUALITY ON THE FOLLOWING:

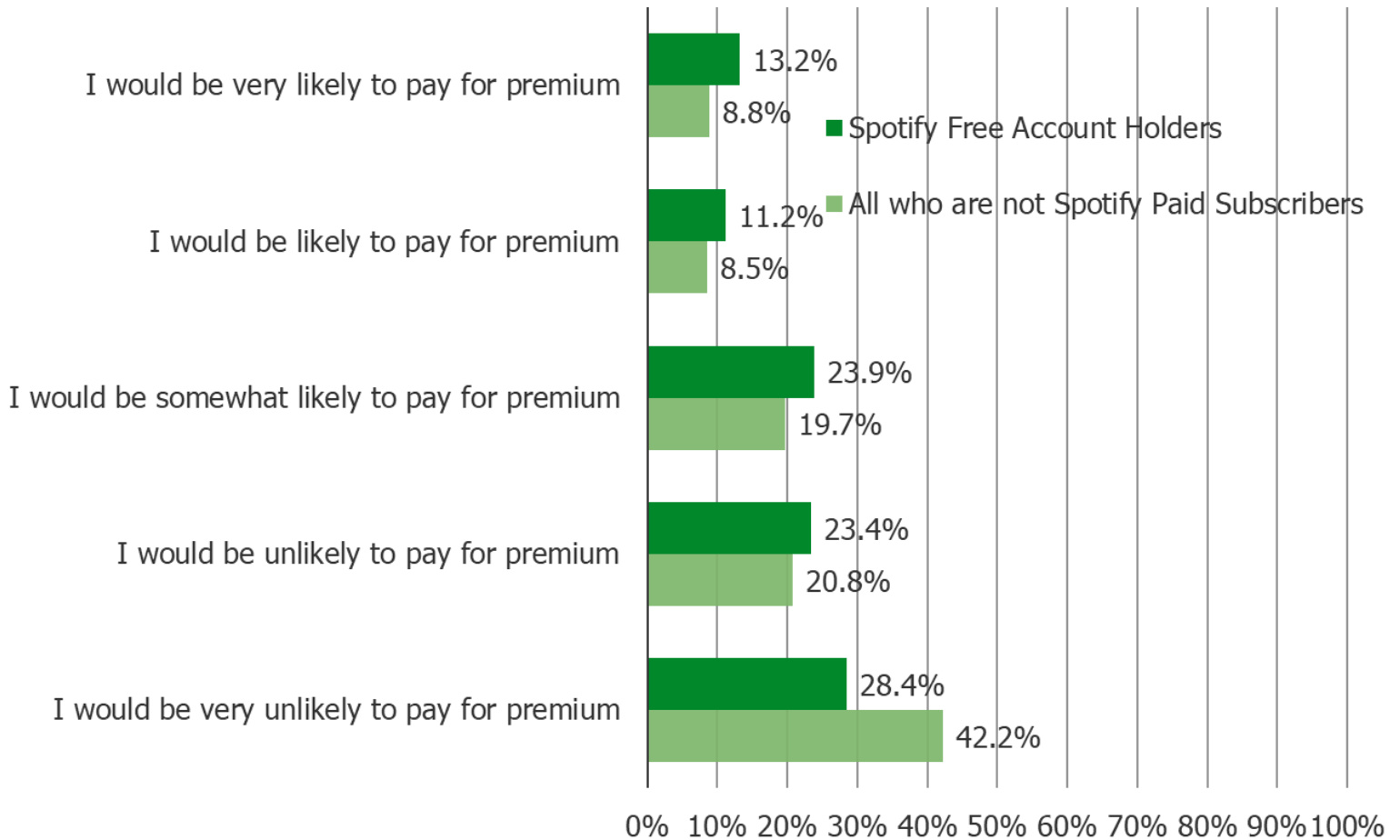
Posed to users of each of the following.



	N =
Sirius Radio	228
Apple Music	304
Spotify	502
Pandora	417
Youtube Music	391

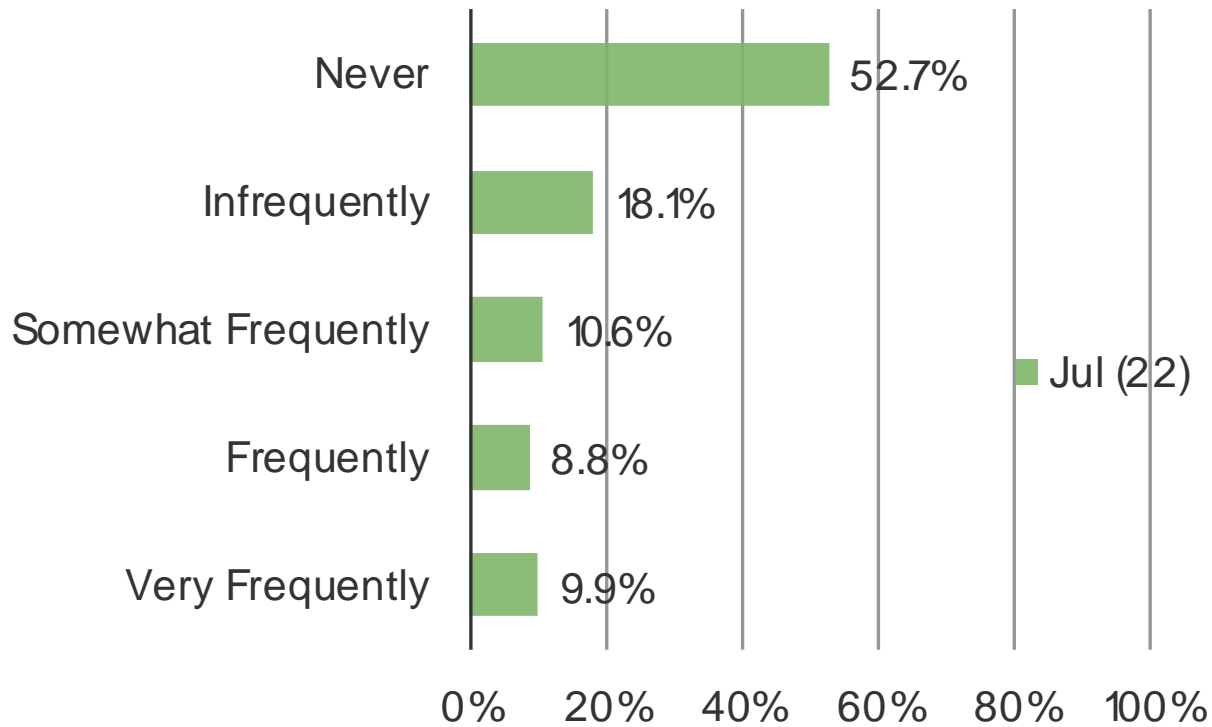
IF SPOTIFY OFFERED HIGH FIDELITY AUDIO (IE, CD QUALITY AUDIO) ON ITS PREMIUM SUBSCRIPTION, WOULD YOU PAY FOR PREMIUM TO GET ACCESS? (\$9.99 PER MONTH)

Posed to respondents who are not currently paid Spotify users (comparing all non-paid-users vs. those who are free Spotify account holders).

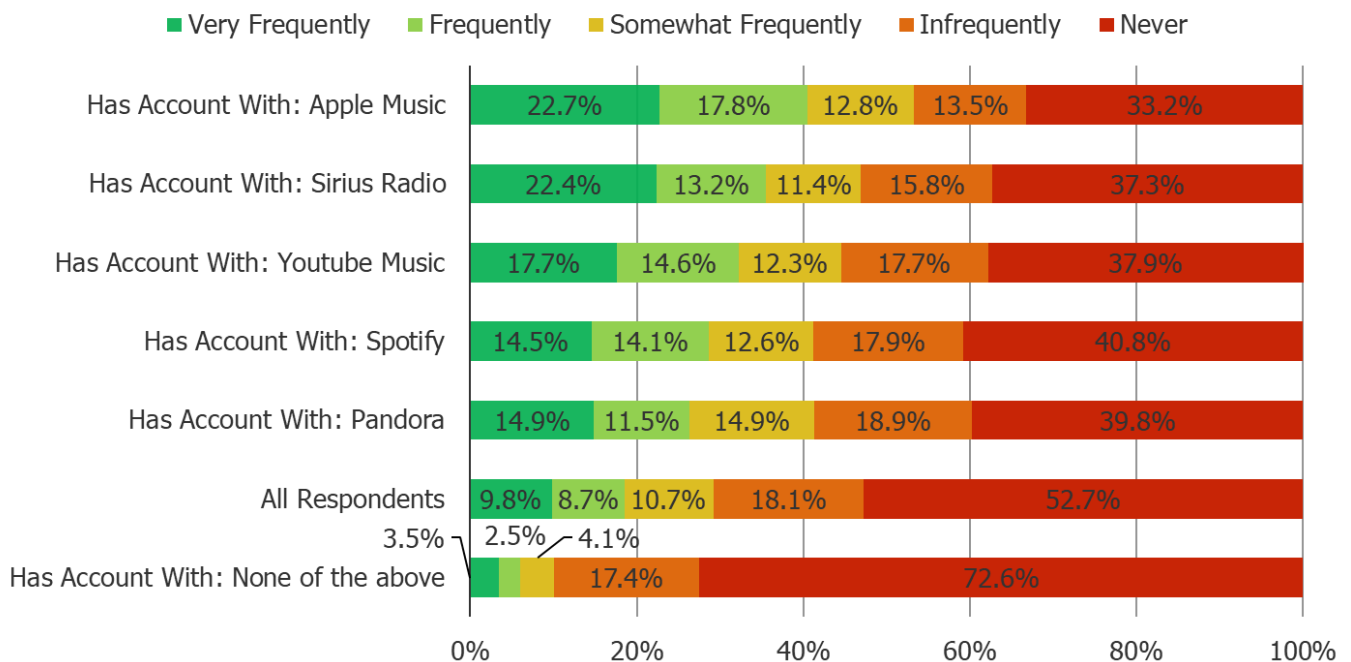


HOW OFTEN DO YOU LISTEN TO AUDIOBOOKS?

Posed to all respondents.

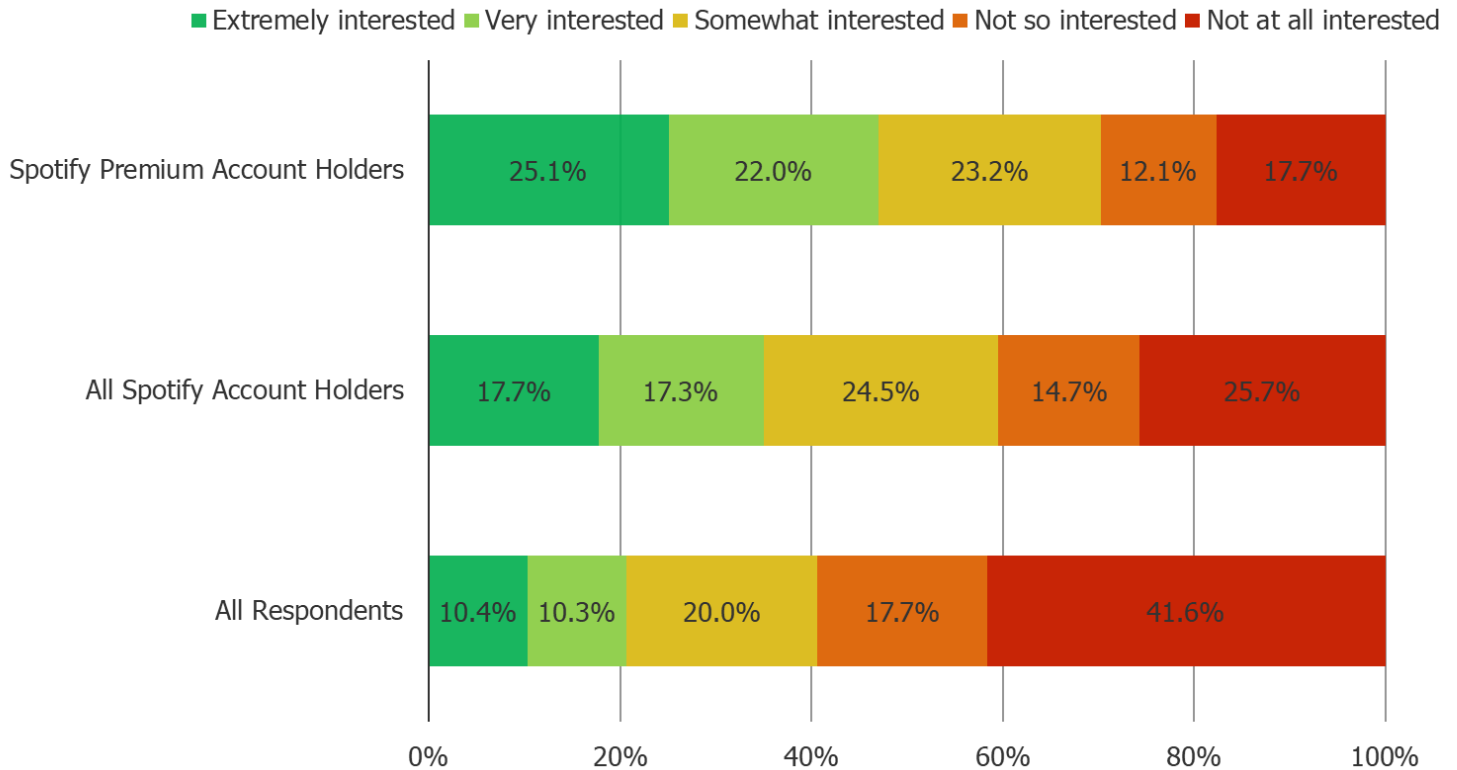


Cross-Tab Analysis: How often users of the following listen to audiobooks in general



PLEASE EVALUATE YOUR INTEREST LEVEL IN BEING ABLE TO LISTEN AUDIOBOOKS ON SPOTIFY?

Posed to all respondents, cross-tabbed with filters.



Qualitative Color: Spotify Users:

- Those who are interested mentioned that it would be nice to have everything in one platform, it would be more convenient, etc. And that it would give them an alternative to Audible.
- Those who were not interested either said they don't listen to audiobooks or that they prefer to read instead of listening to audiobooks.

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



AUDIOBOOKS



WHAT DO YOU VALUE MOST ABOUT THIS PLATFORM?

Posed to account holders of each of the following platforms.

Spotify



Apple Music



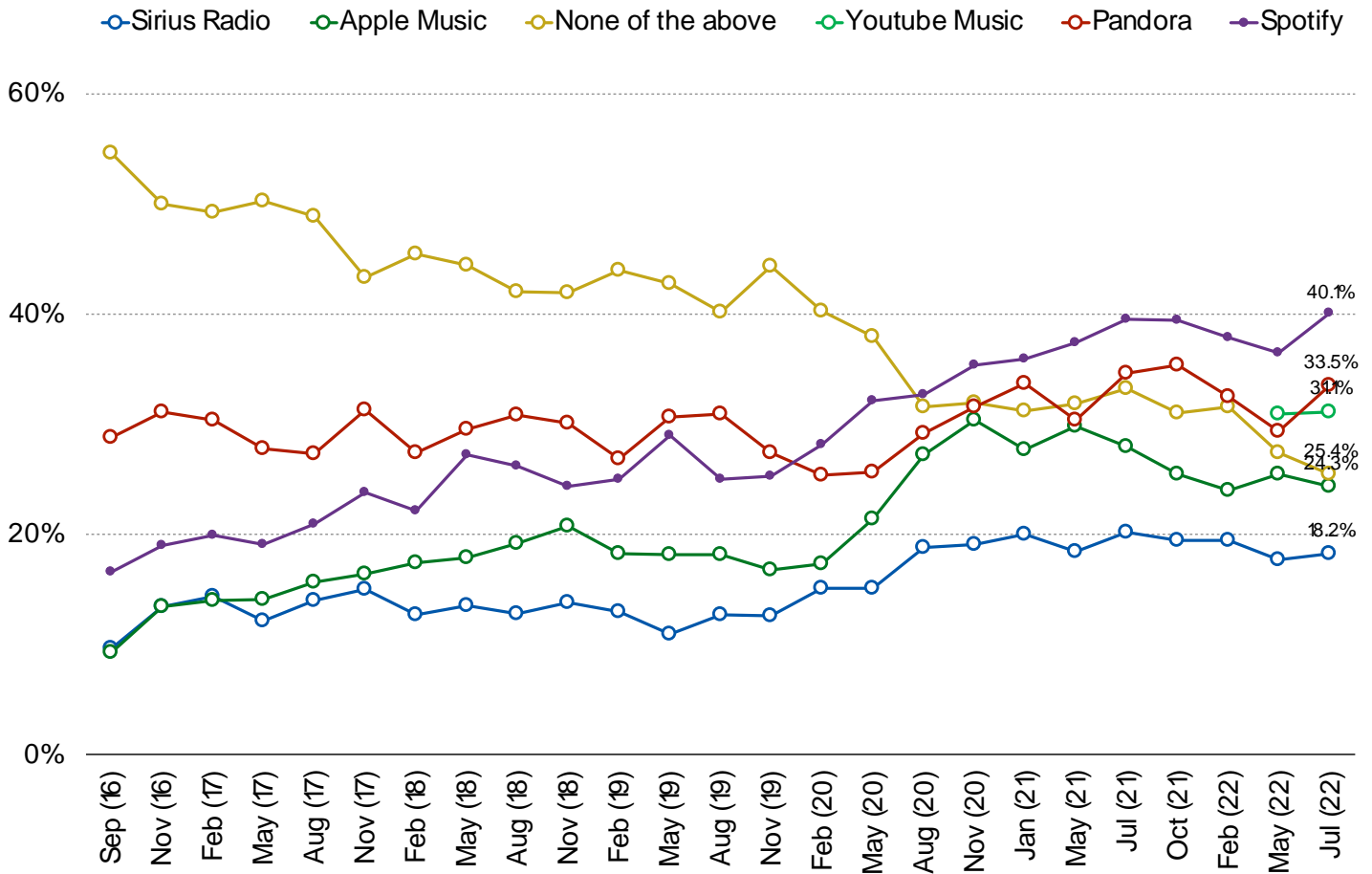
Sirius XM



STREAMING AND SATELLITE AUDIO TRENDS

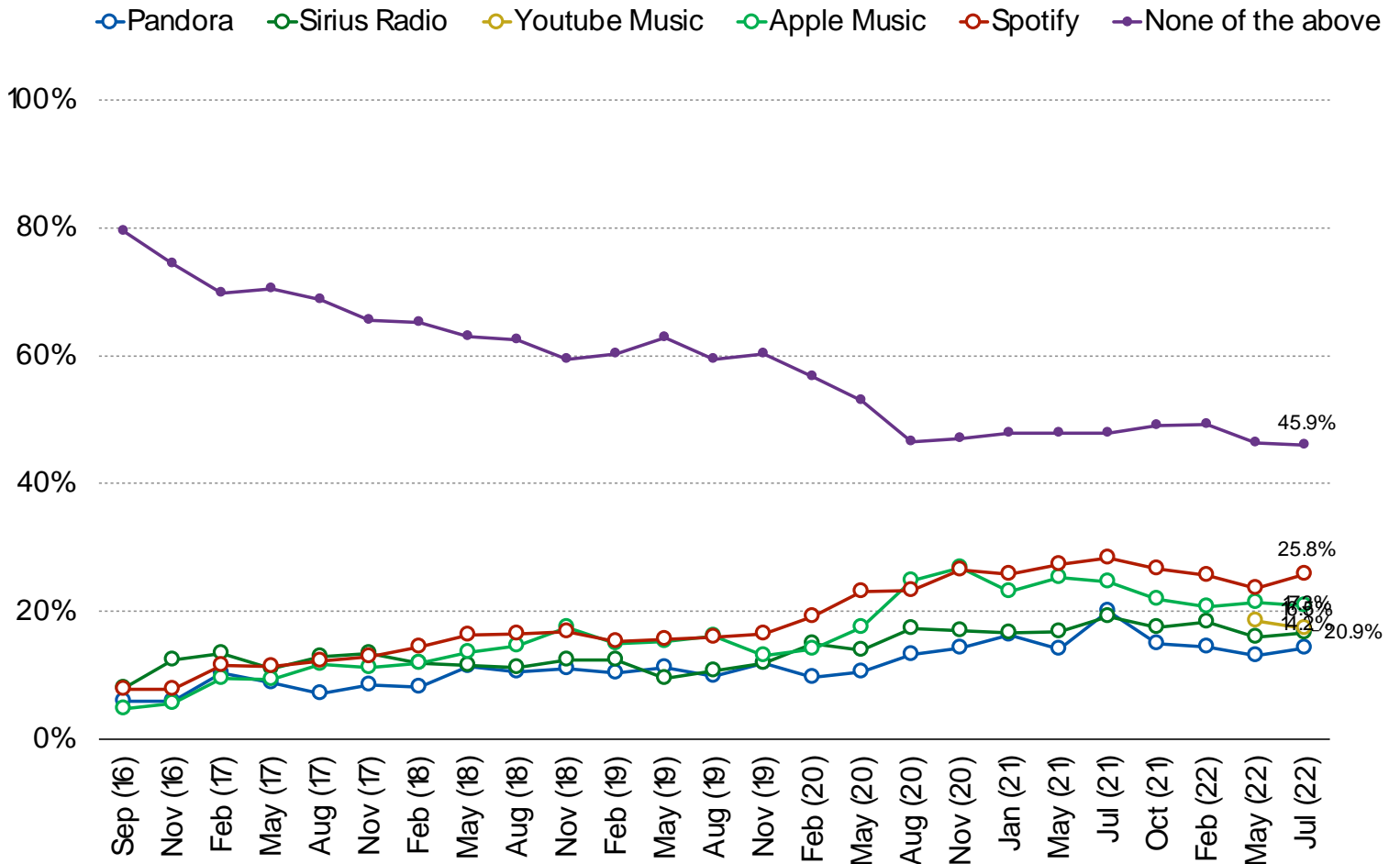
DO YOU HAVE AN ACCOUNT WITH ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.



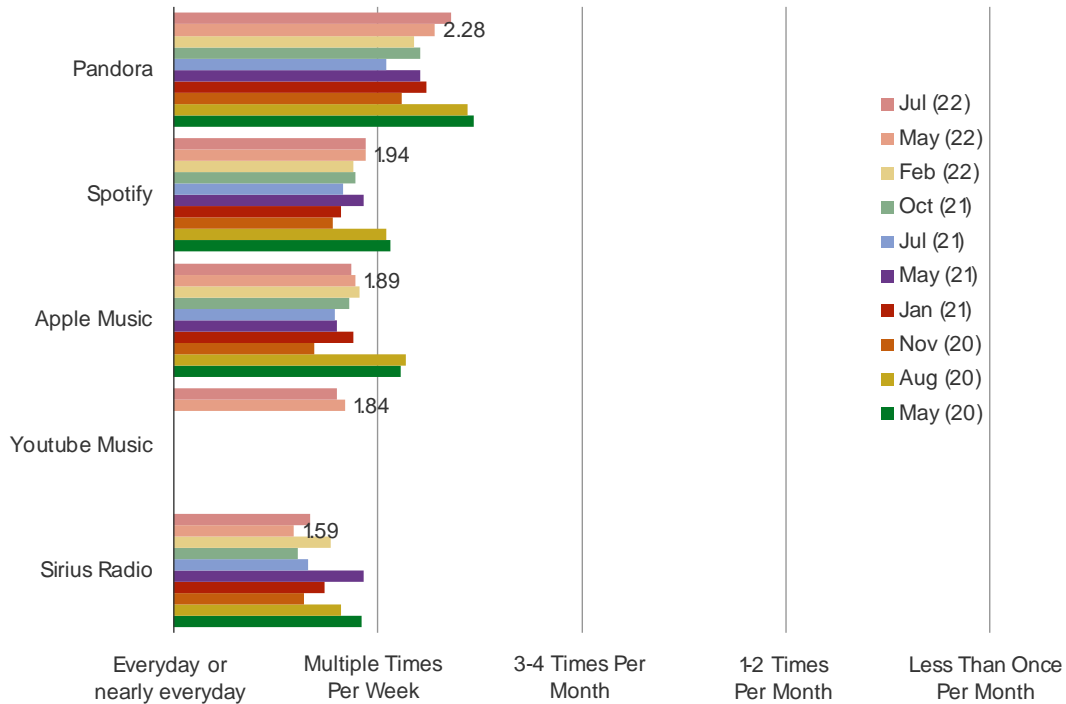
ARE YOU CURRENTLY PAYING FOR A SUBSCRIPTION WITH ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents.



HOW OFTEN DO YOU USE THE FOLLOWING?

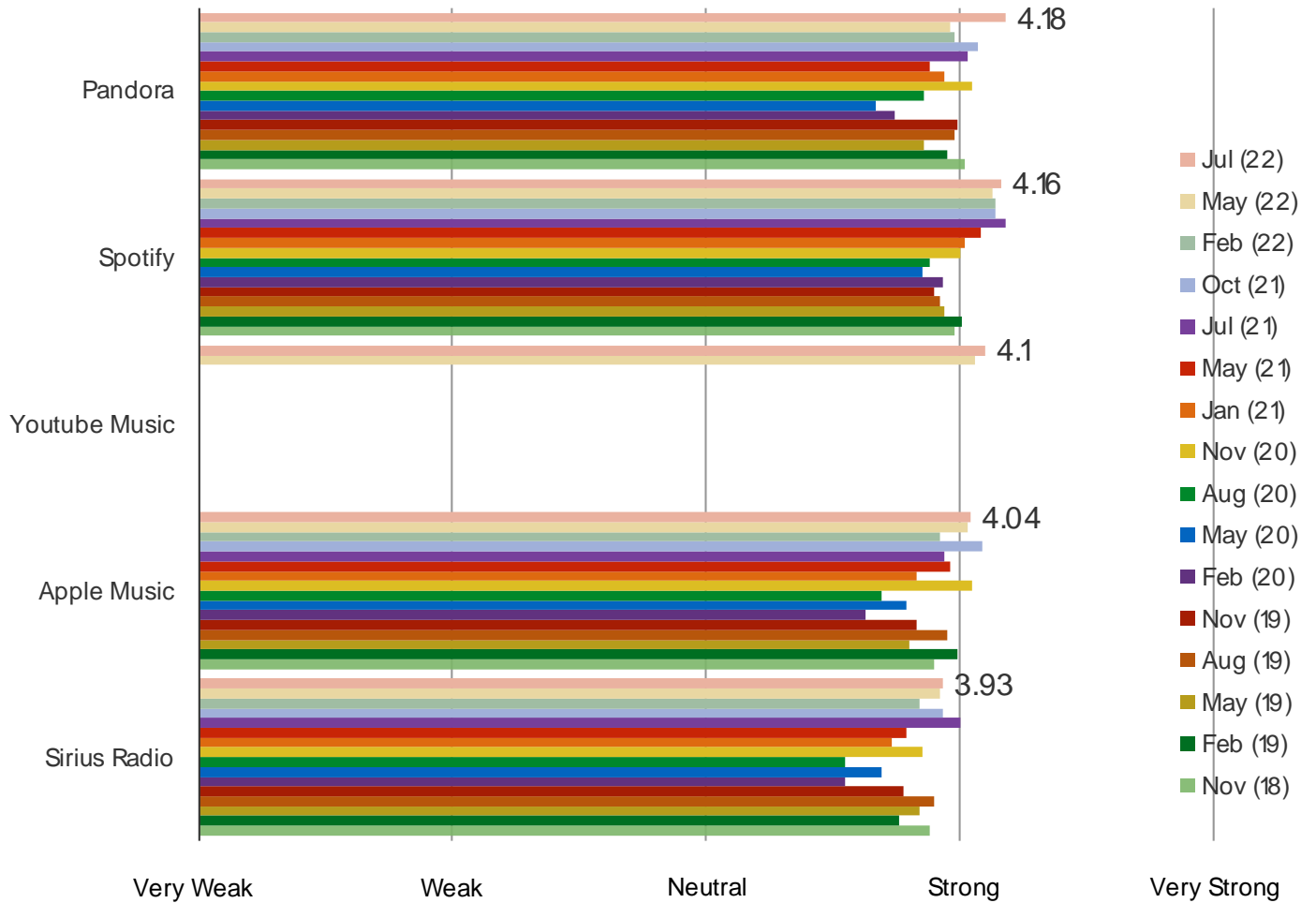
Respondents who have an account with each platform (free or paid)



← More Frequent

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

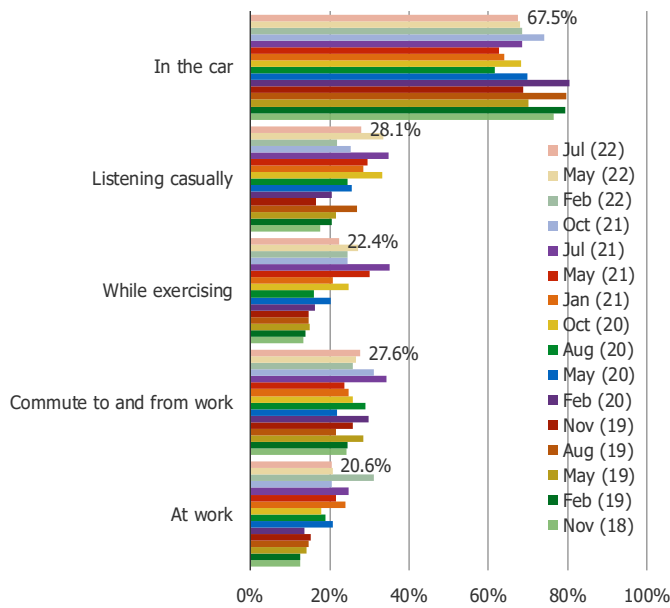
Respondents who pay for each platform



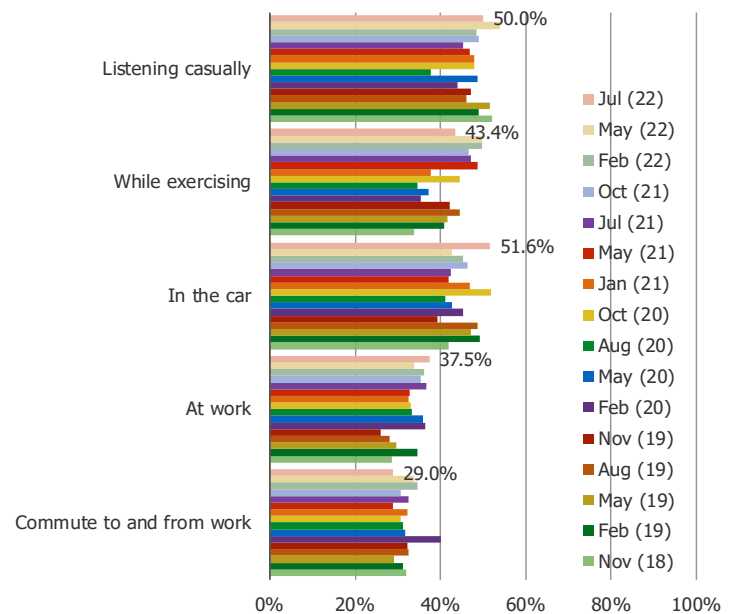
WHERE DO YOU TYPICALLY LISTEN TO THIS PLATFORM? (SELECT ALL THAT APPLY)

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

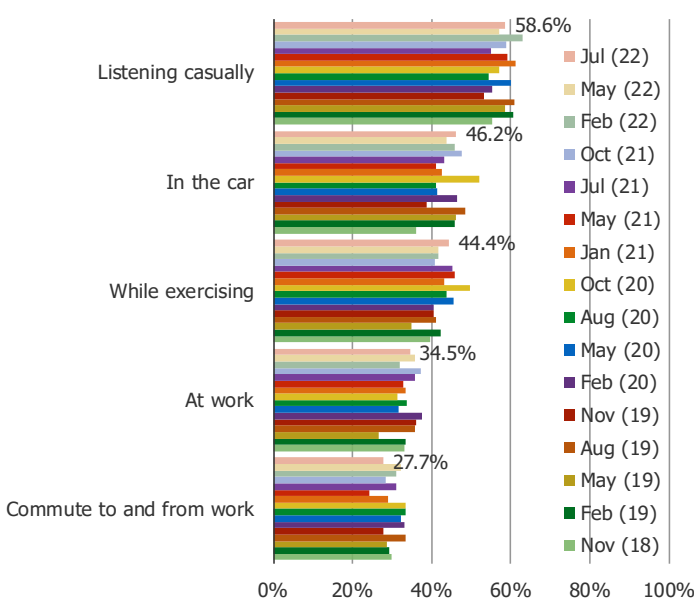
SIRIUS XM



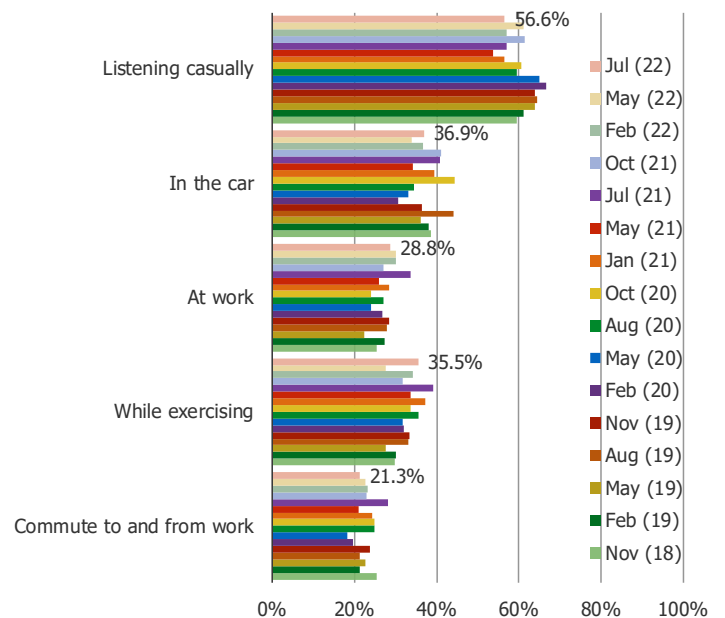
APPLE MUSIC



SPOTIFY

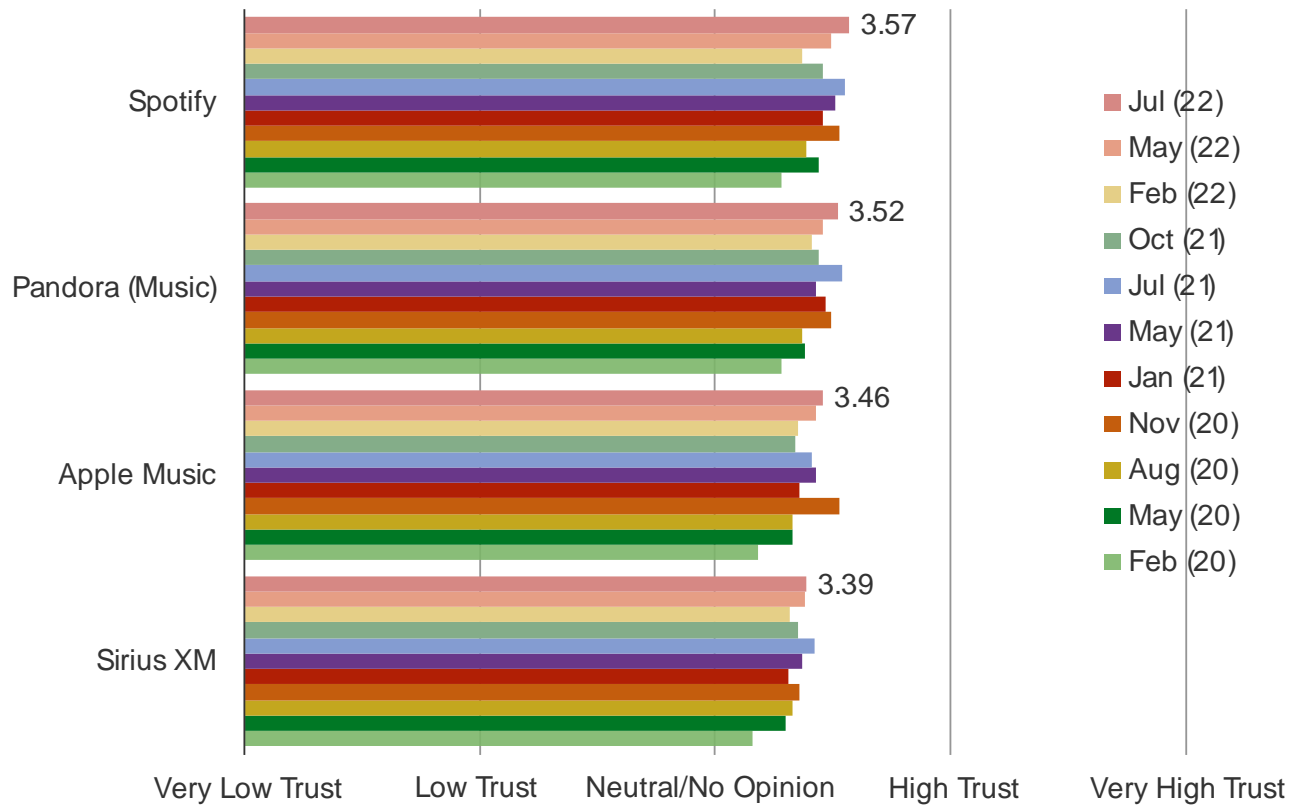


PANDORA



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

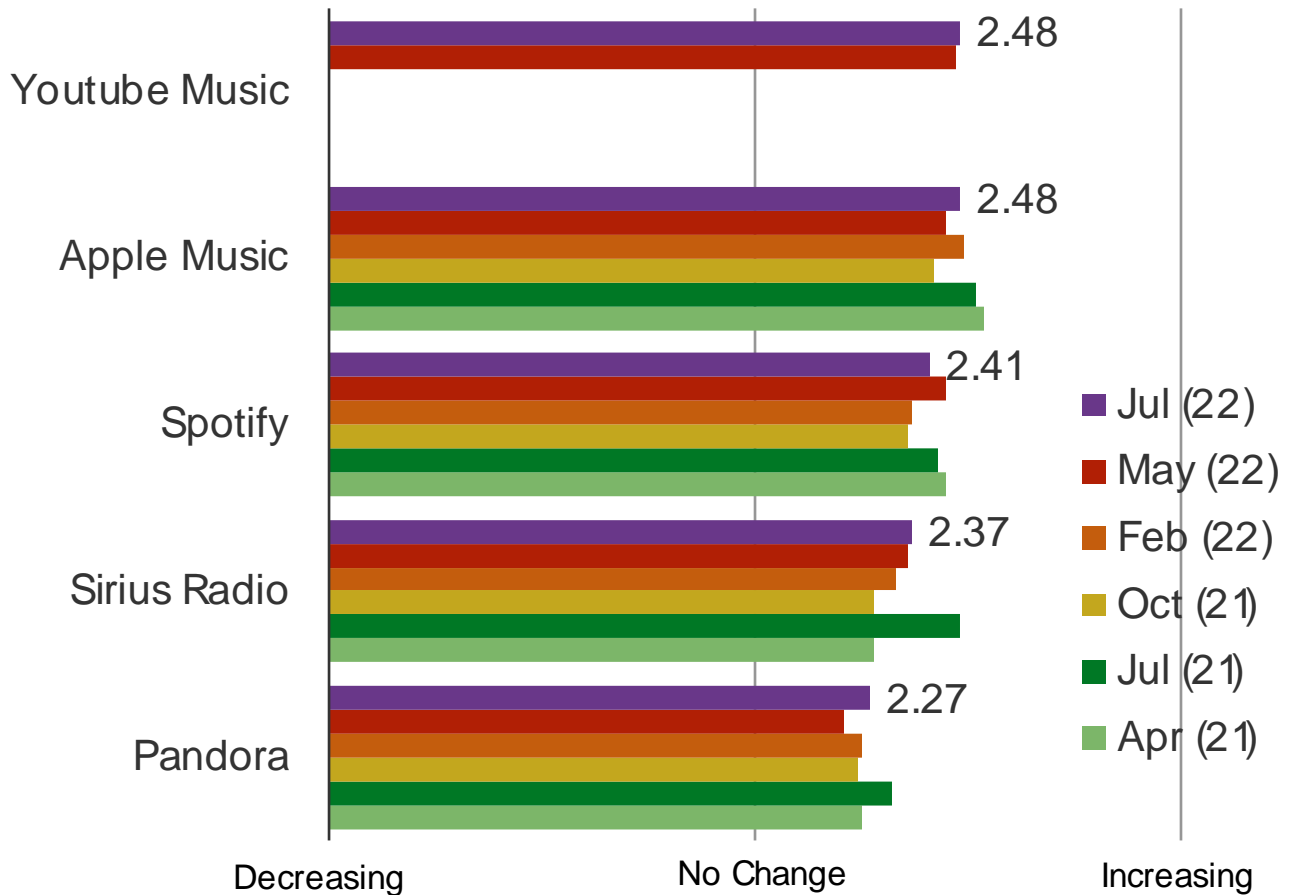
Posed to all respondents



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.

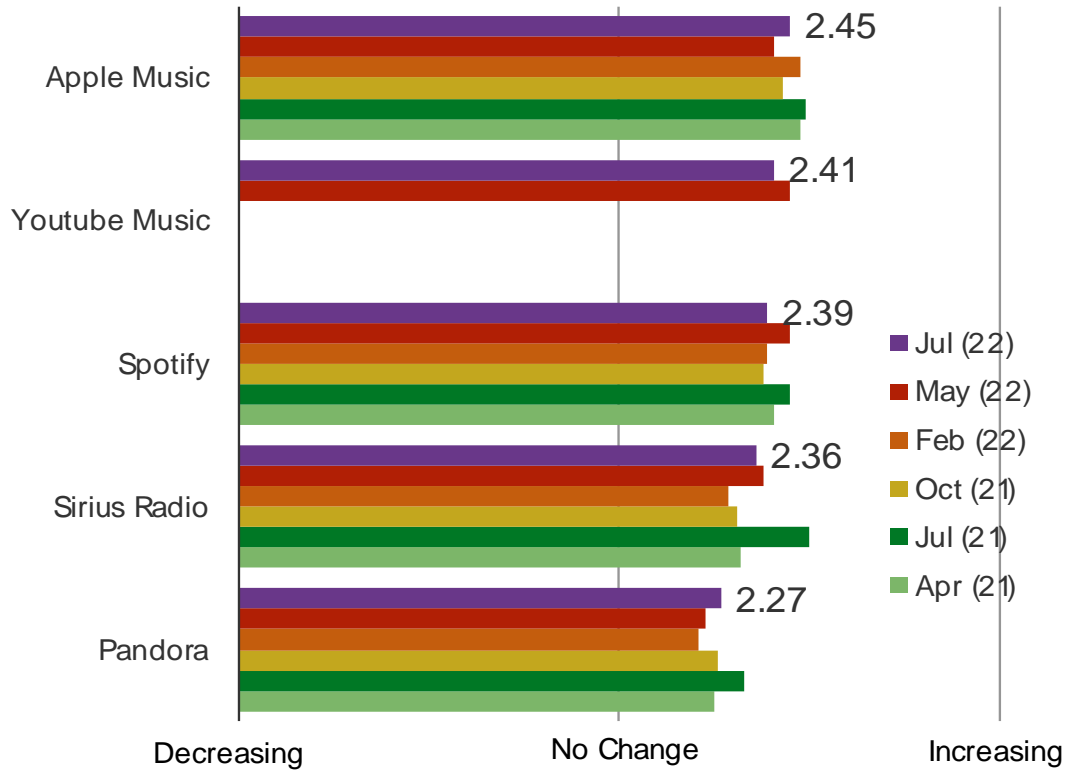
New Music (Released in the Past 6 Months)



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.

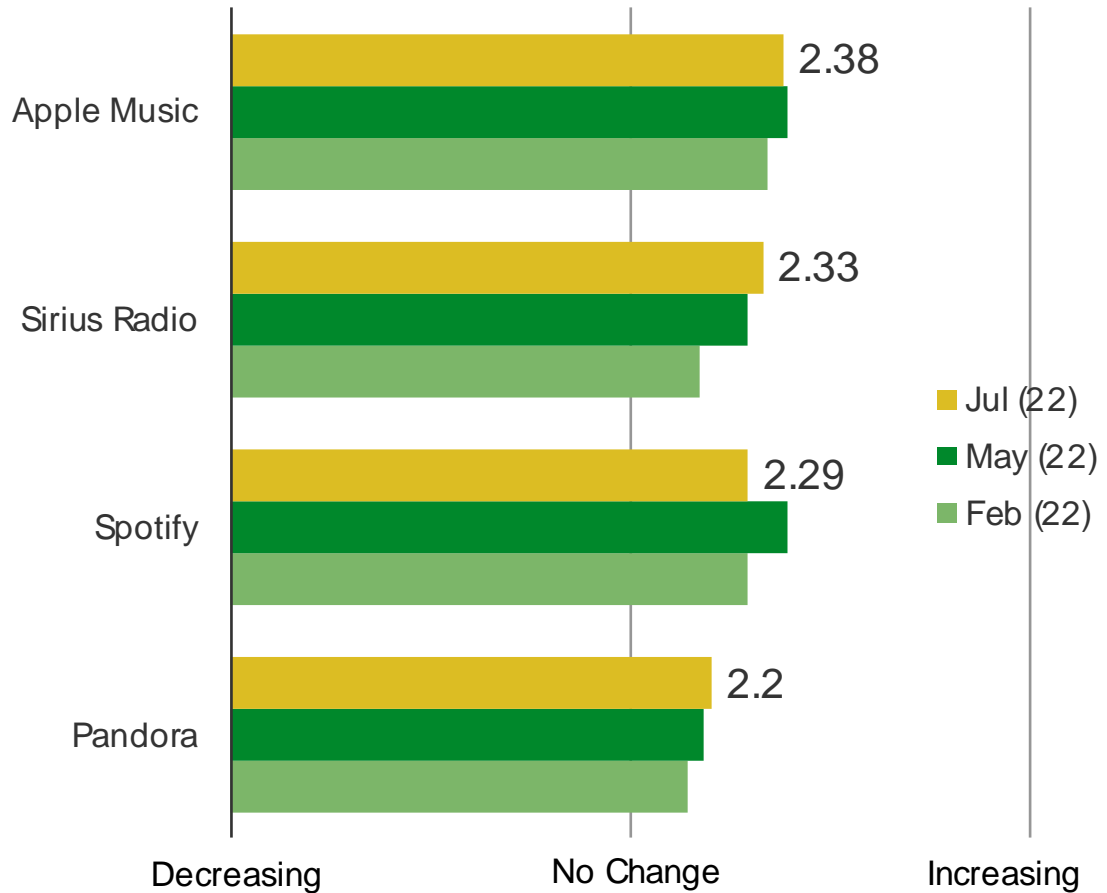
Catalog Music (Released 6+ Months Ago)



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

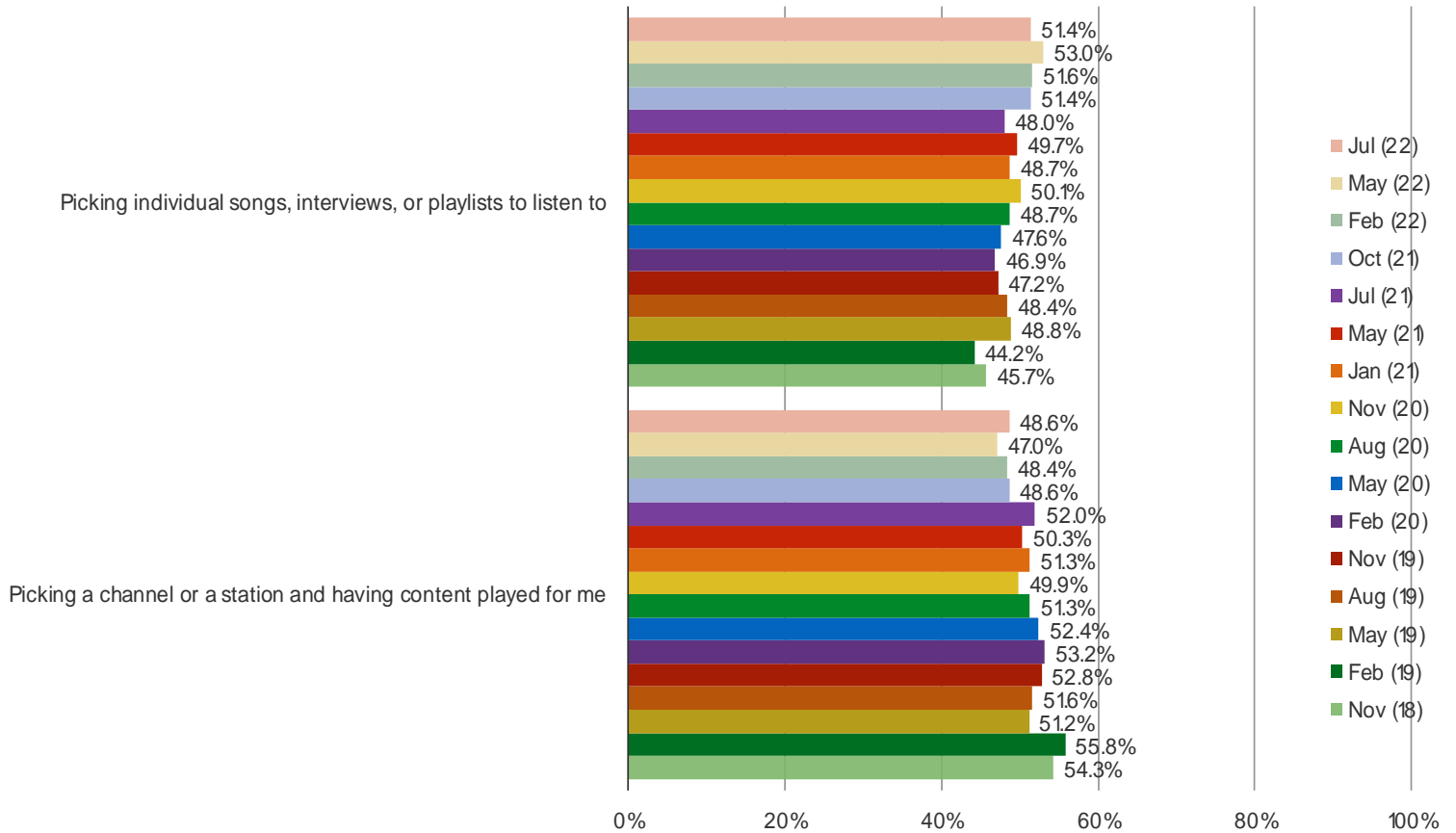
Posed to users of each platform.

Podcasts



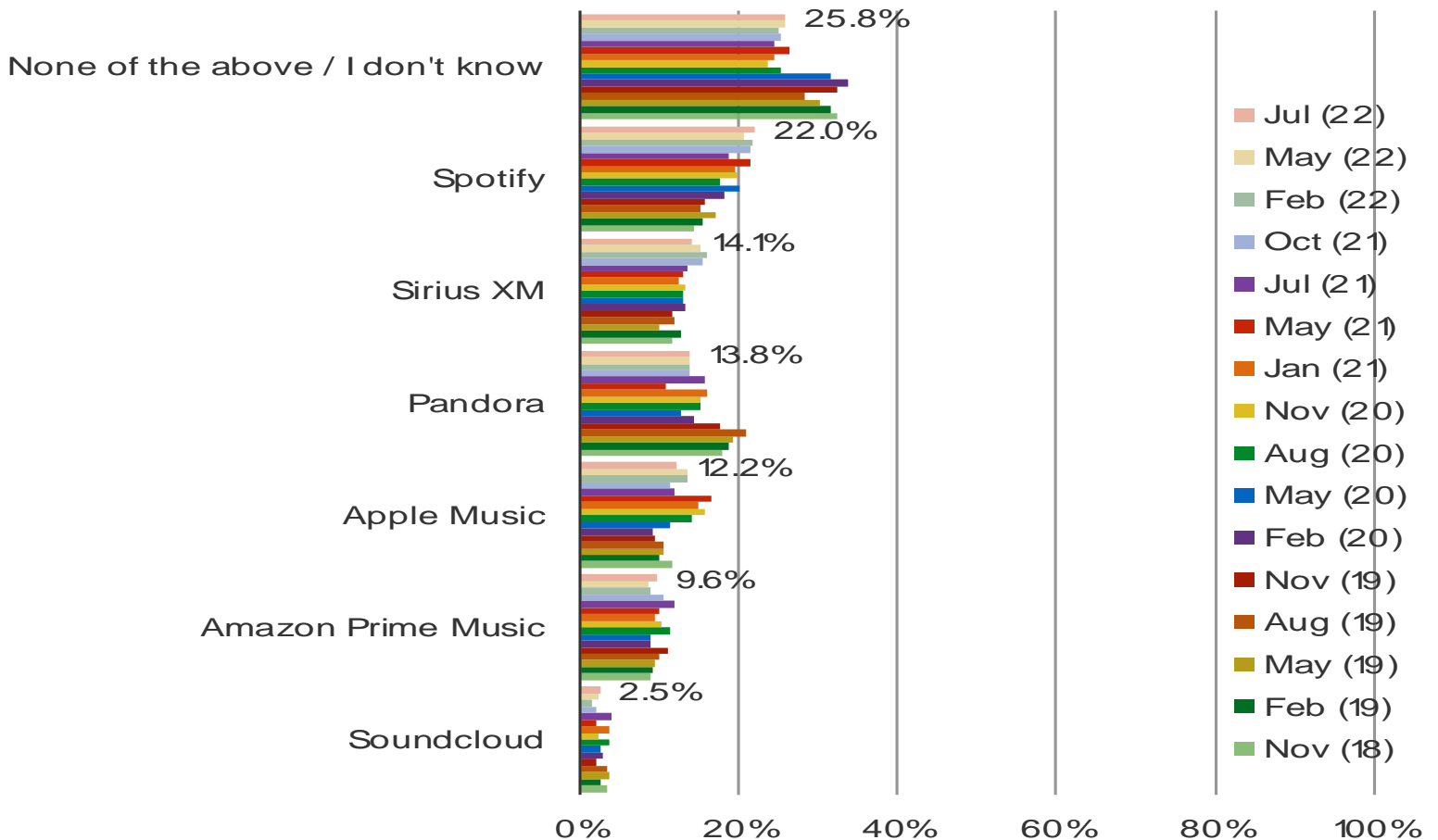
FOR LISTENING TO MUSIC AND TALK-SHOW CONTENT, WHICH IS BETTER?

Posed to all respondents.



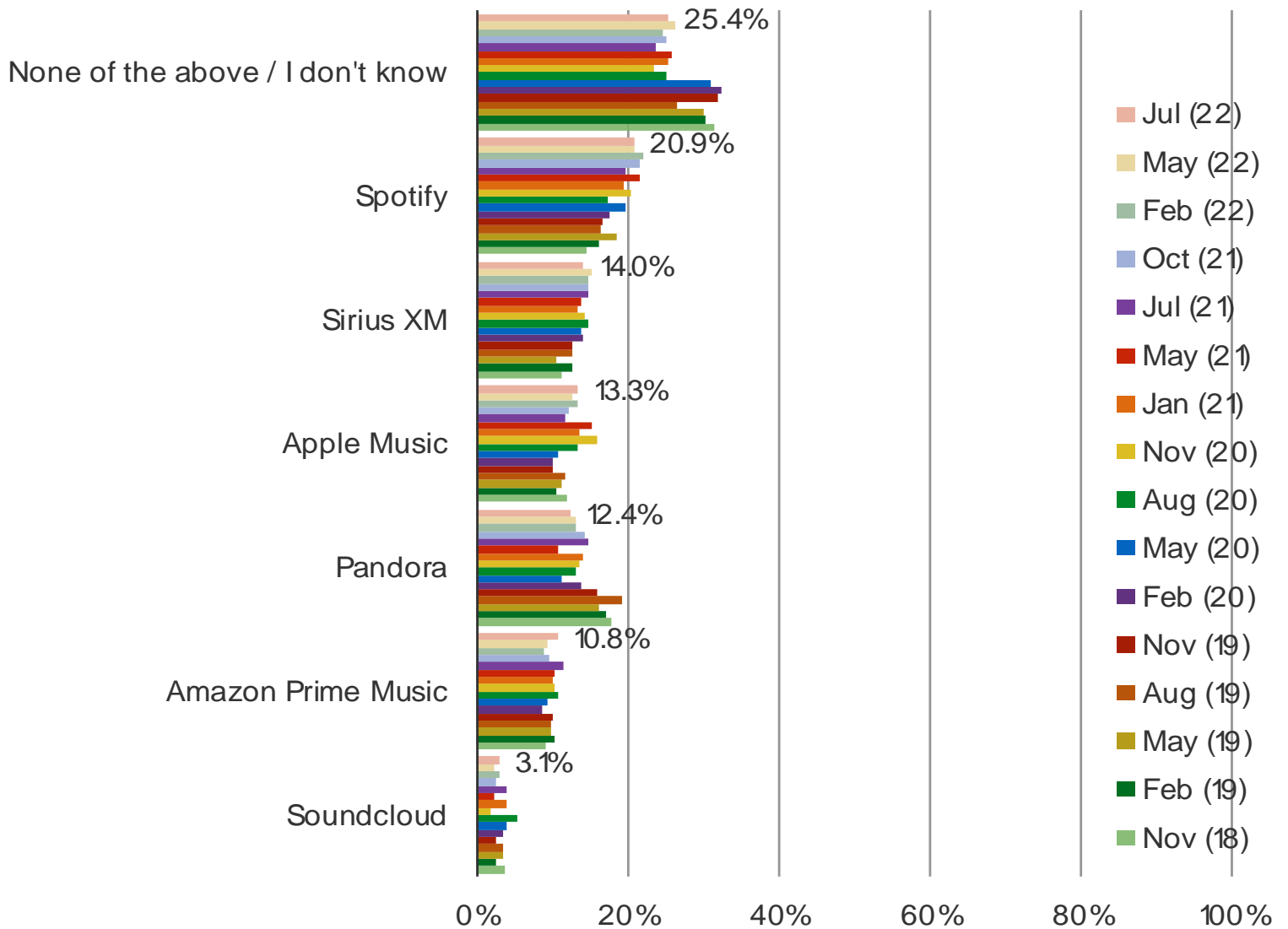
IN YOUR OPINION, WHICH PLATFORM IS BEST WHEN IT COMES TO THE WAY IN WHICH THEY DELIVER CONTENT TO ITS USERS? (IE. THE BEST USER EXPERIENCE)

Posed to all respondents.



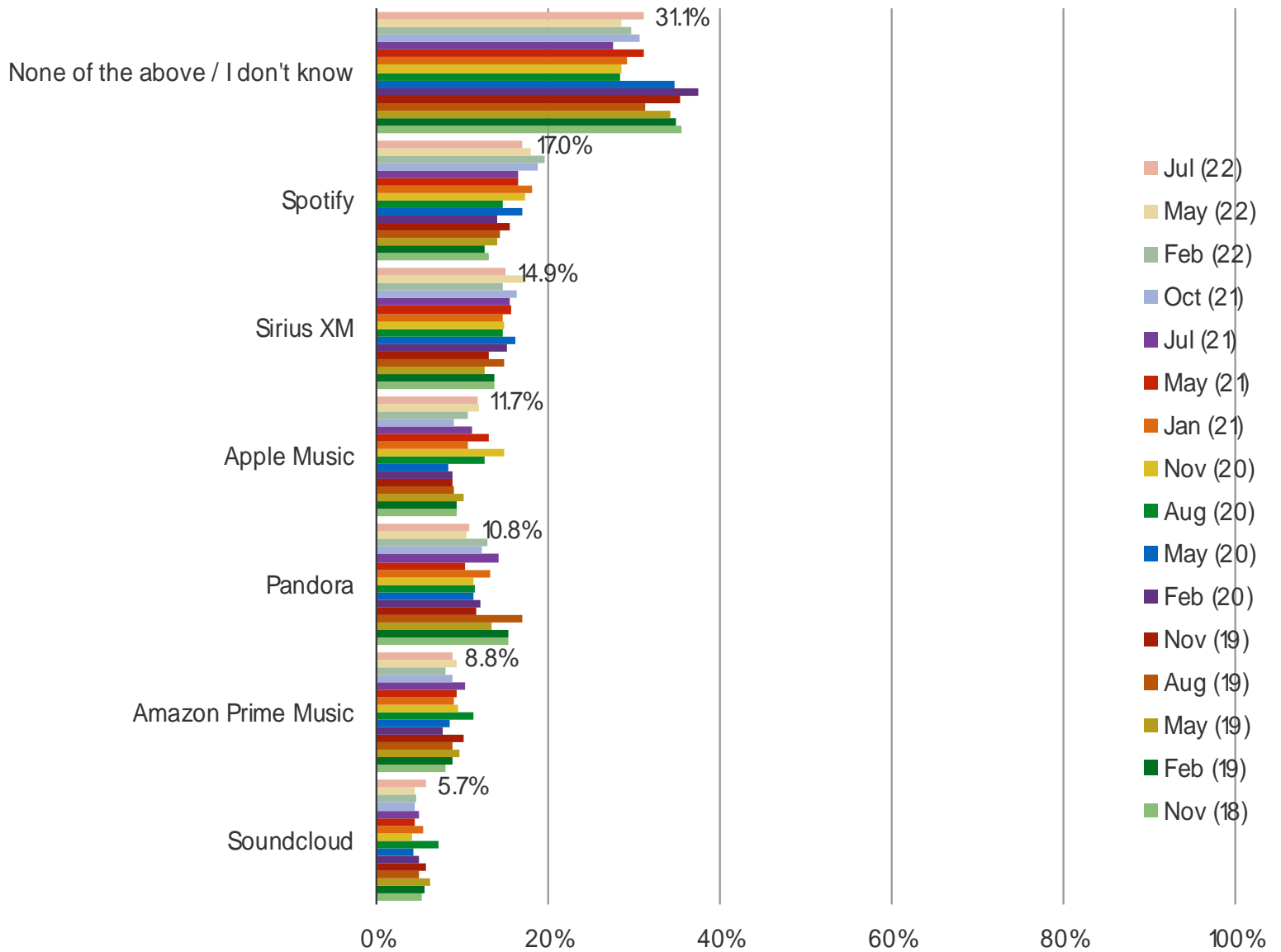
IN YOUR OPINION, WHICH PLATFORM HAS THE BEST CONTENT AVAILABLE?

Posed to all respondents.



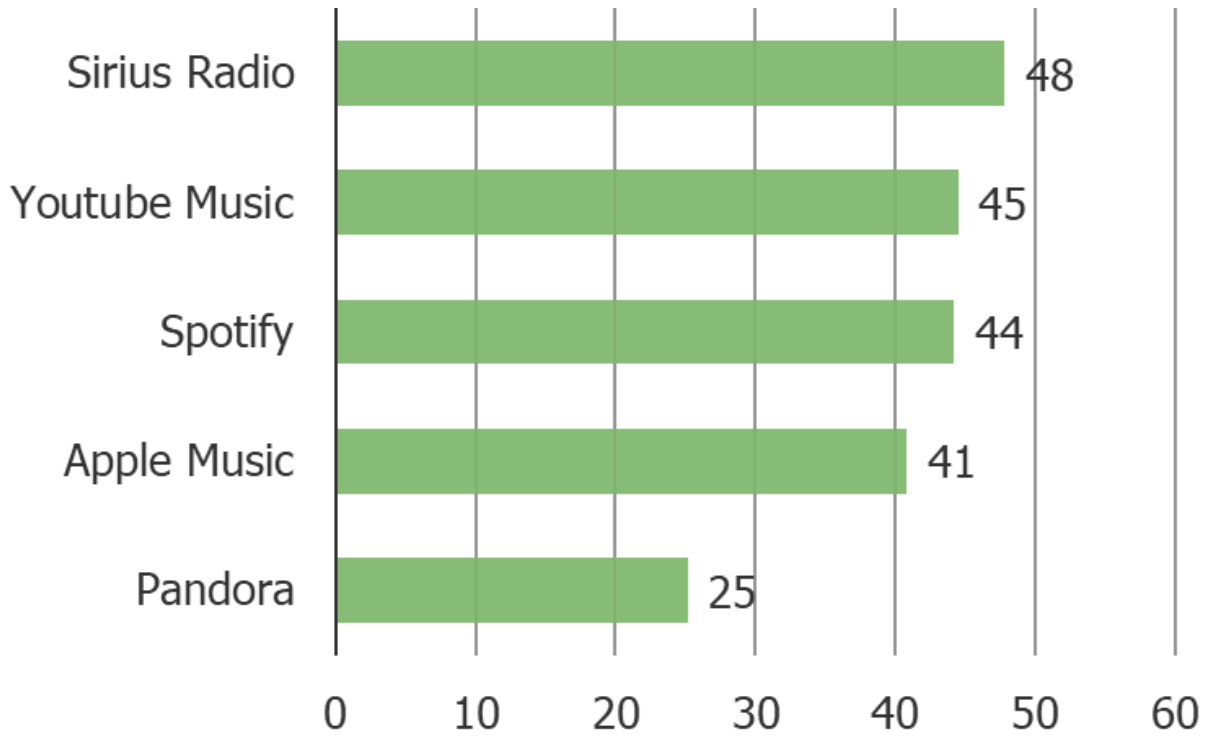
IN YOUR OPINION, WHICH PLATFORM HAS THE MOST UNIQUE CONTENT AVAILABLE THAT YOU CAN'T FIND ANYWHERE ELSE?

Posed to all respondents.



HOW LIKELY ARE YOU TO RECOMMEND THE FOLLOWING TO A FRIEND OR COLLEAGUE?

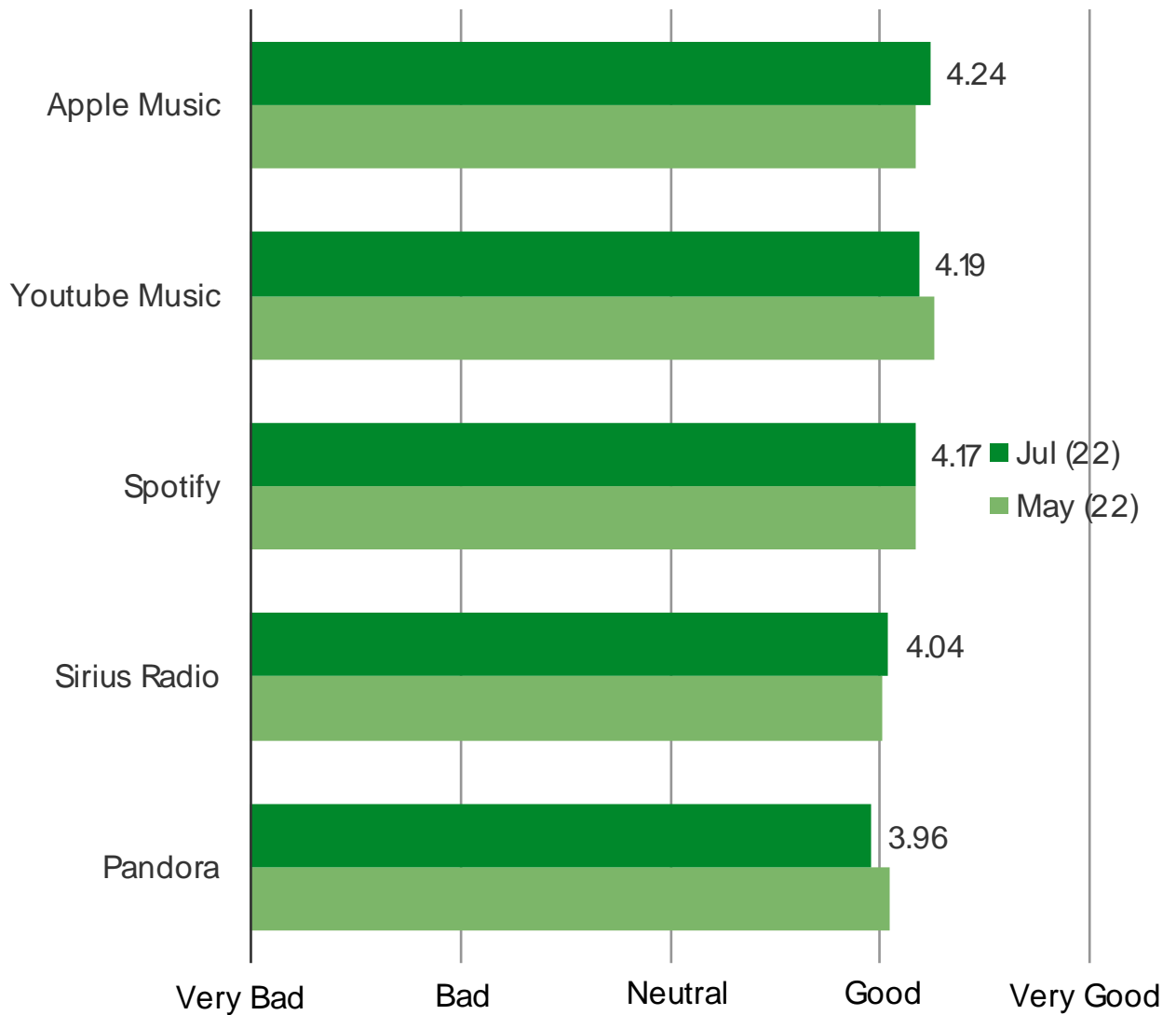
Posed to respondents who have an account with each of the following.



	N =
Sirius Radio	228
Apple Music	304
Spotify	502
Pandora	417
Youtube Music	391

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

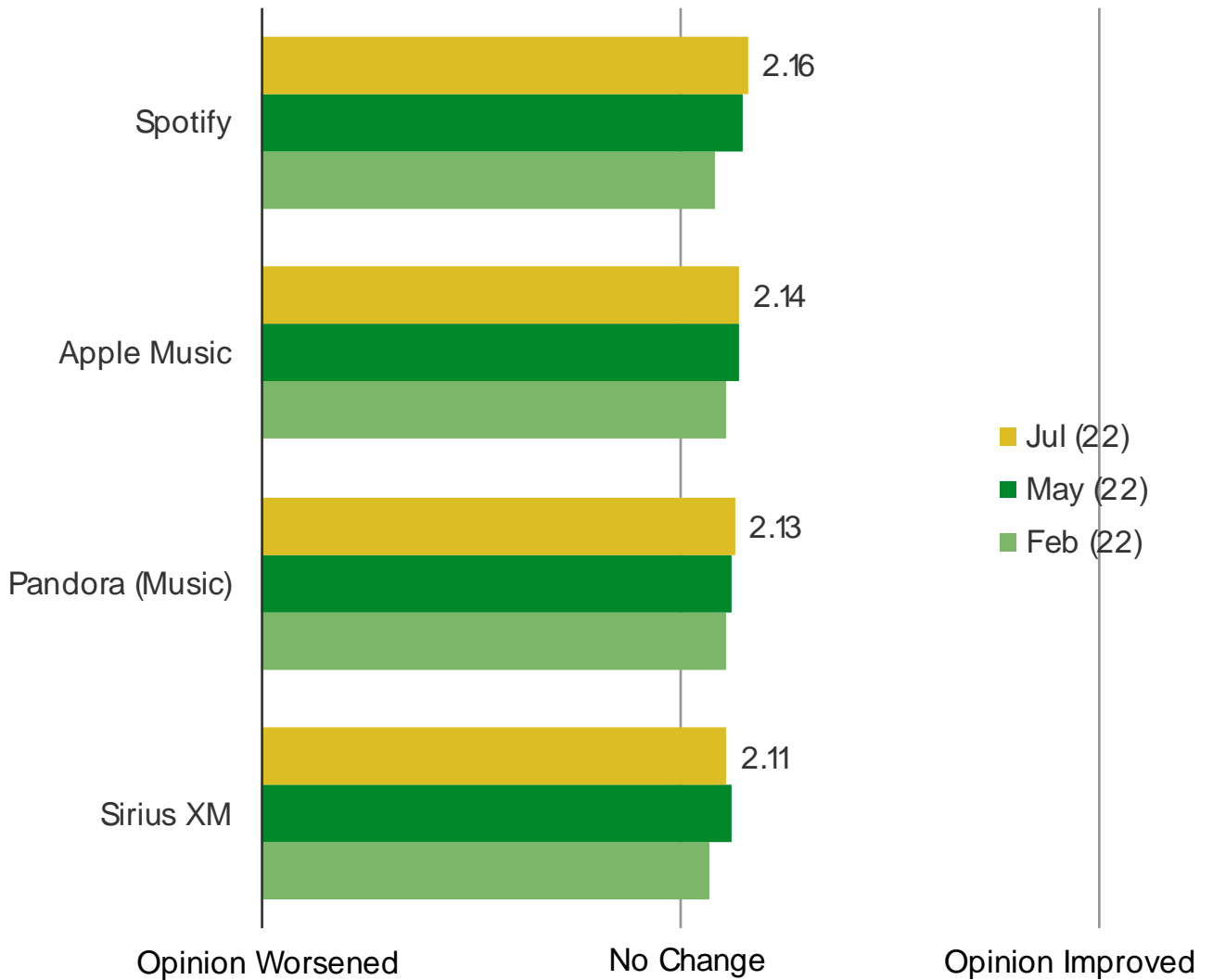
Posed to users of each of the following.



	N=
Sirius Radio	228
Apple Music	304
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Youtube Music	391

HAS YOUR OPINION OF ANY OF THE FOLLOWING CHANGED RECENTLY?

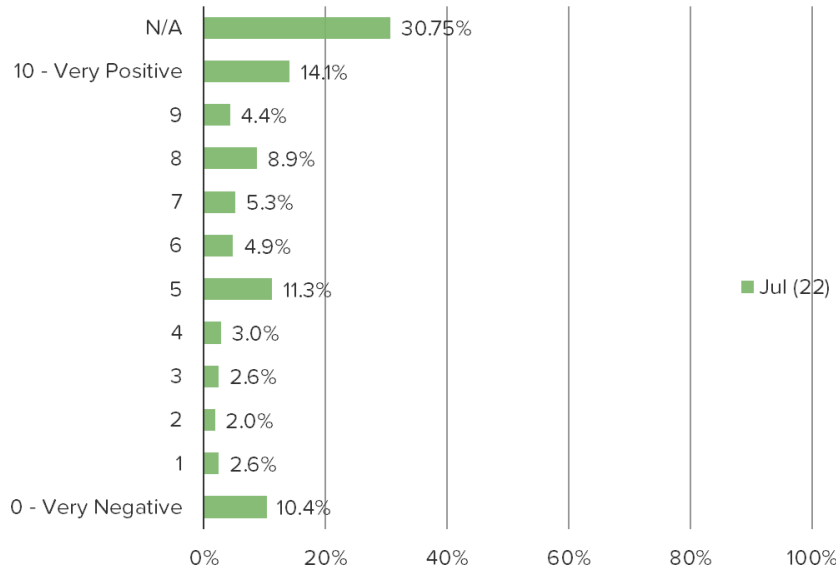
Posed to all respondents.



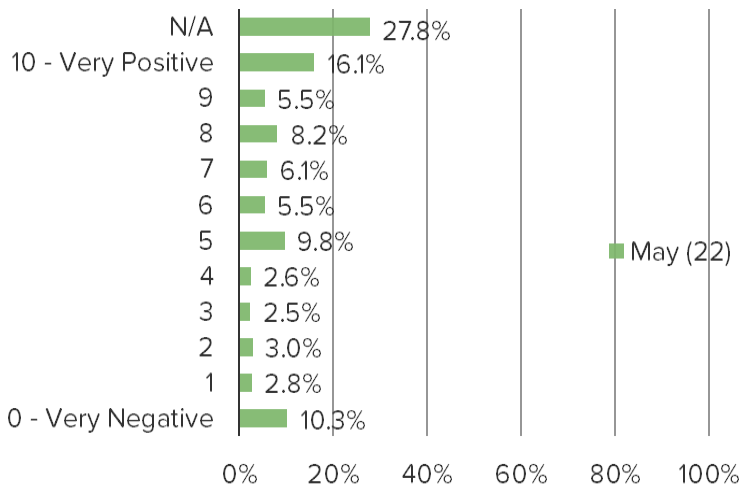
WHAT IS YOUR OPINION OF JOE ROGAN?

Posed to all respondents.

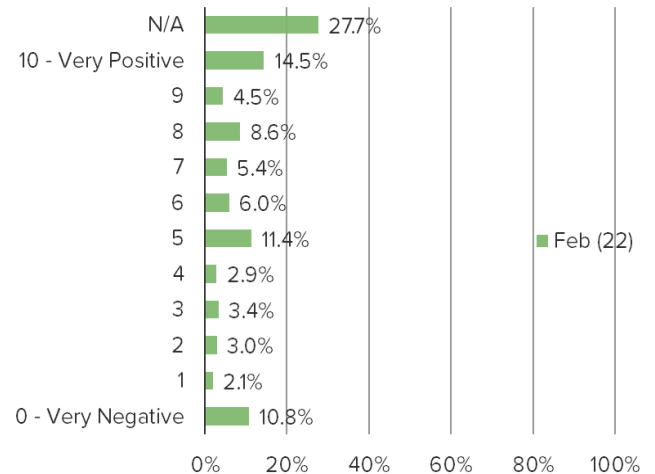
July 2022



May 2022

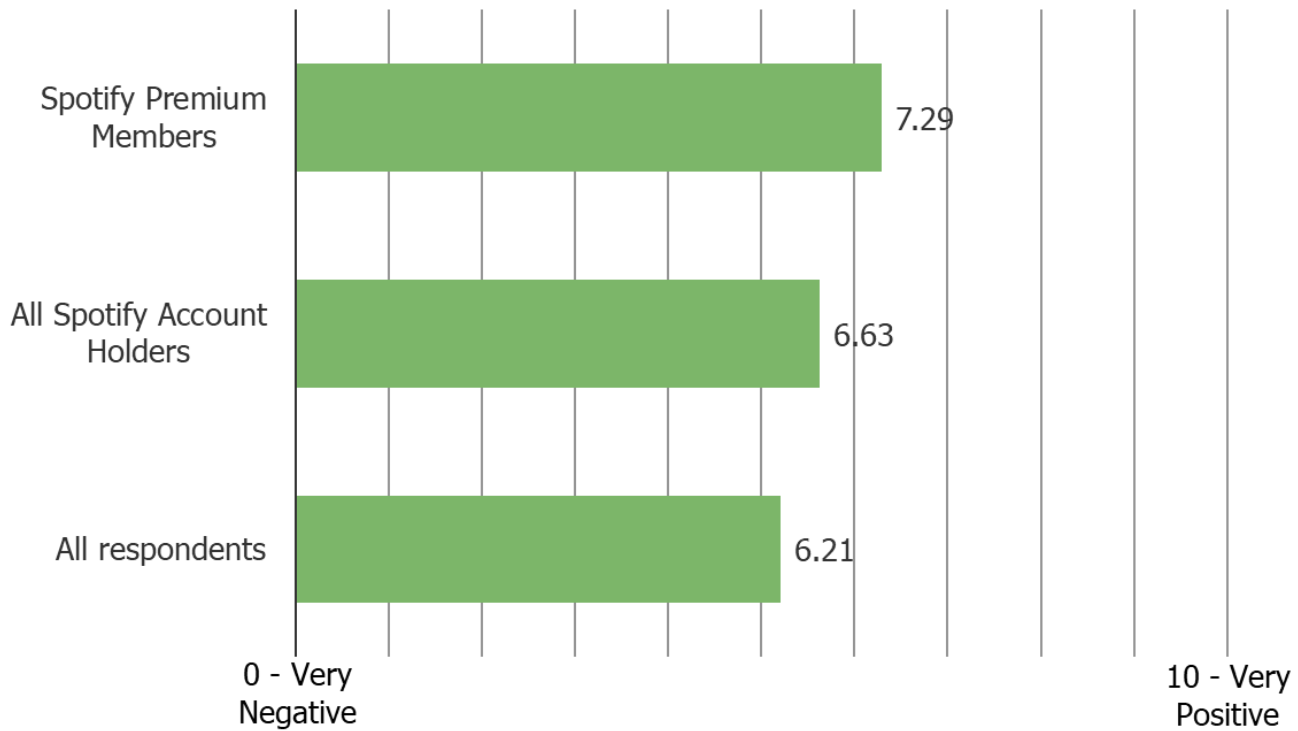


February 2022



WHAT IS YOUR OPINION OF JOE ROGAN?

Posed to all respondents – weighted average, with cross-tabs.



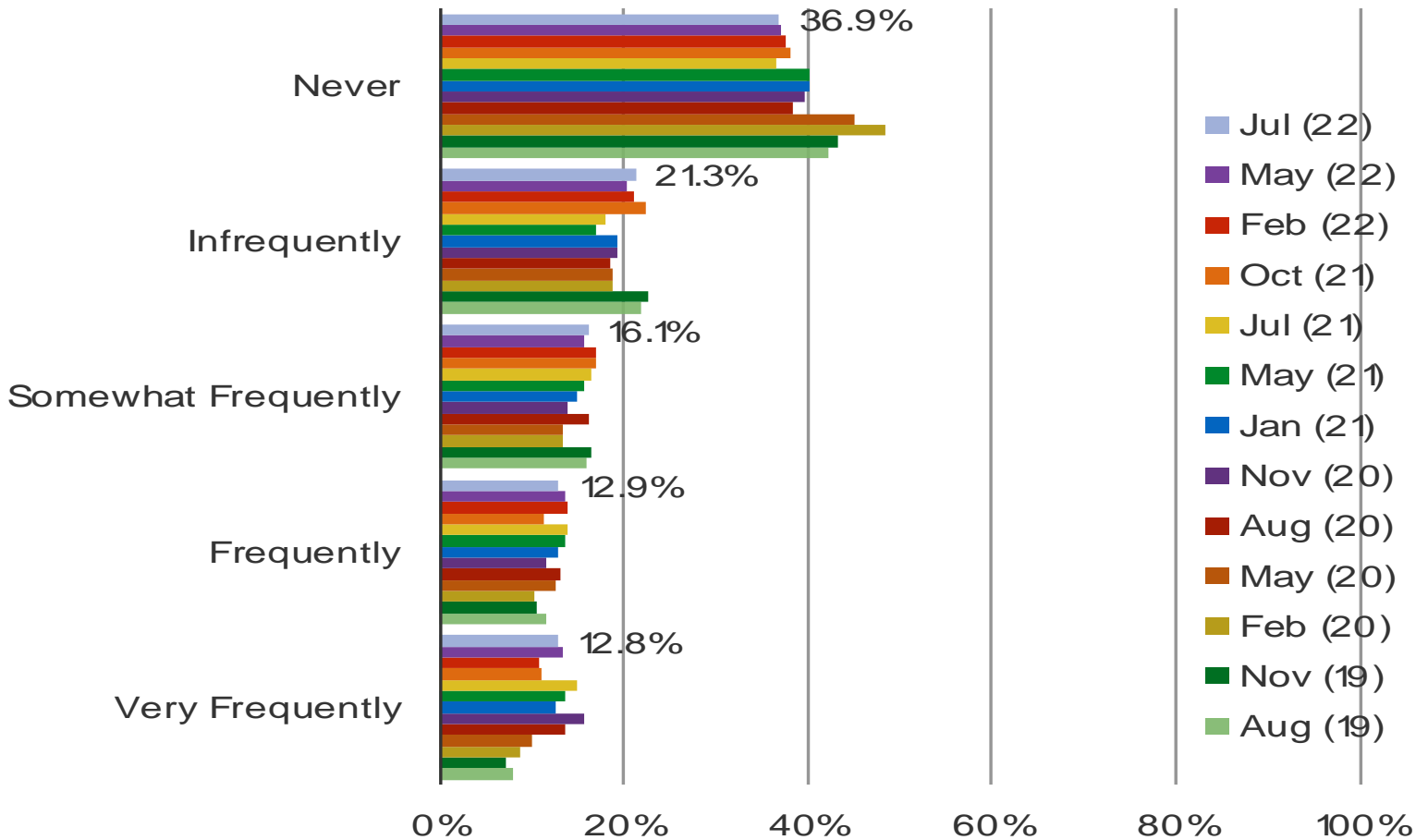
*Weighted average, excluding those who selected "NA"

*Comparing all respondents, Spotify account holders, and Spotify Premium members.

PODCASTS

HOW OFTEN DO YOU LISTEN TO PODCASTS?

Posed to all respondents.



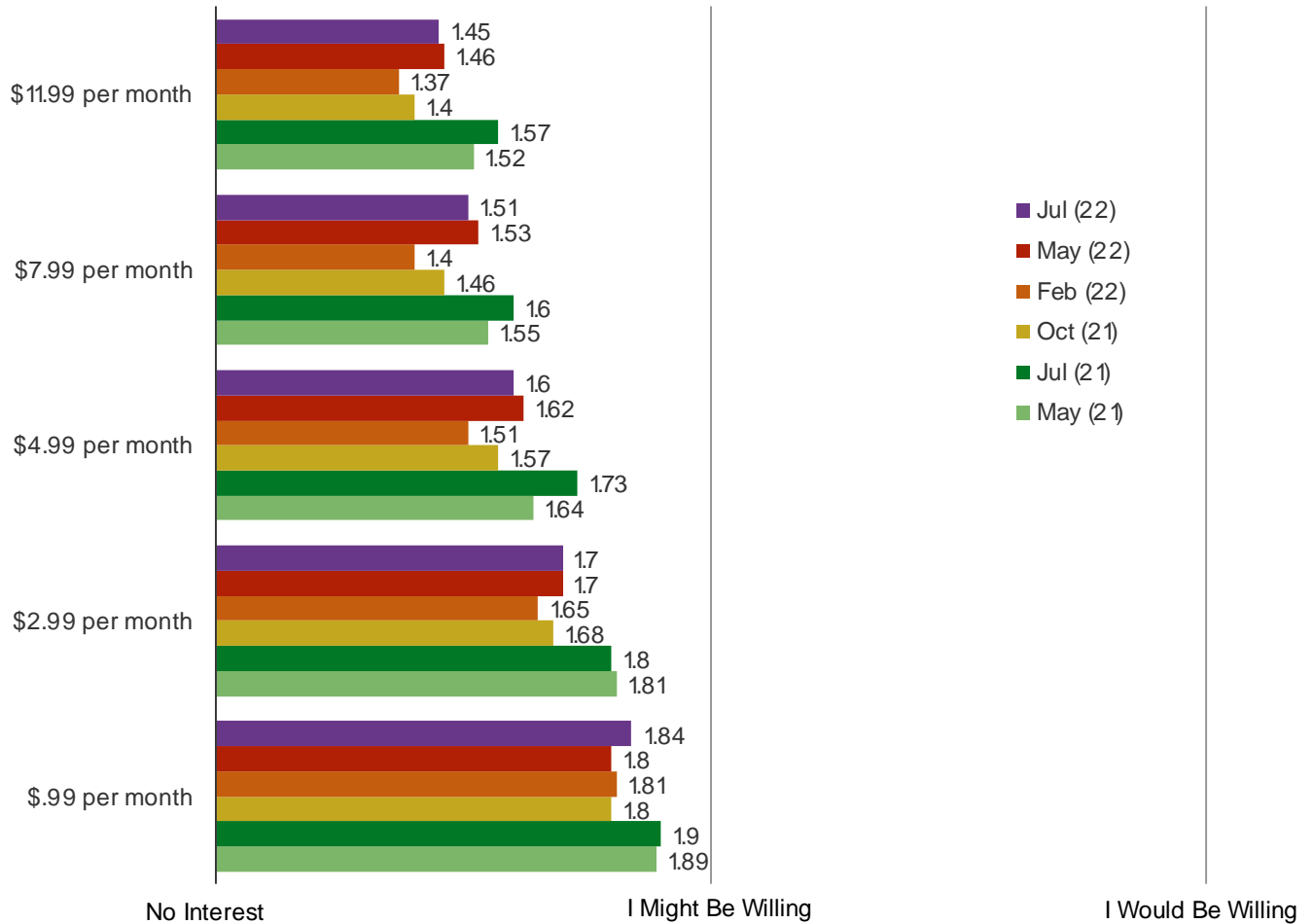
WHAT ARE YOUR FAVORITE PODCASTS TO LISTEN TO AT THE MOMENT?

Posed to all respondents.



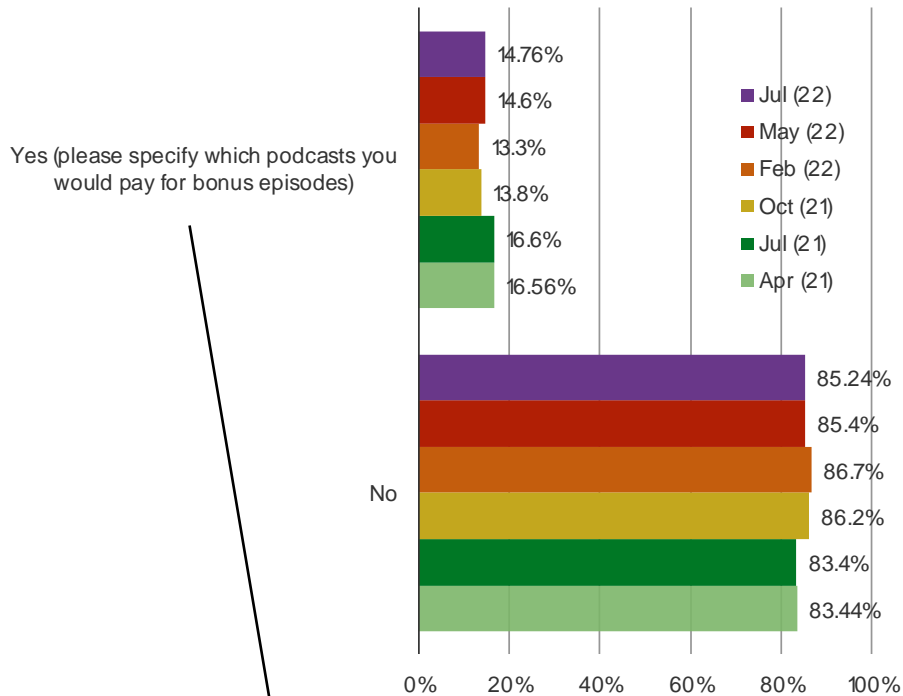
HOW INTERESTED WOULD YOU BE IN PAYING FOR SUBSCRIBER ONLY BONUS EPISODES TO ANY OF THE PODCASTS YOU LISTEN TO OR MIGHT DISCOVER IN THE FUTURE?

Posed to podcast listeners.



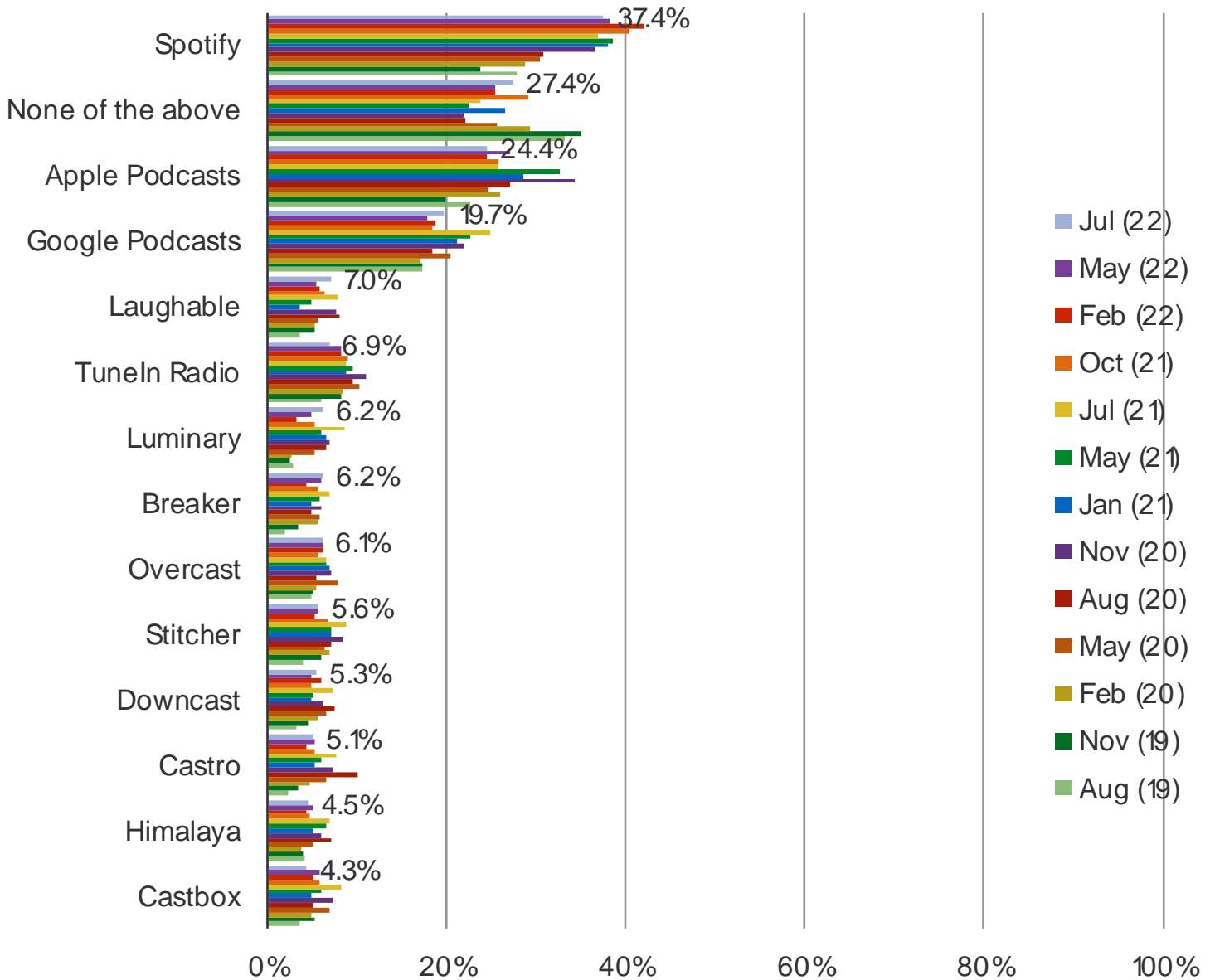
DO YOU LISTEN TO ANY PODCASTS NOW THAT YOU WOULD BE WILLING TO PAY FOR SUBSCRIBER ONLY BONUS EPISODES?

Posed to podcast listeners.



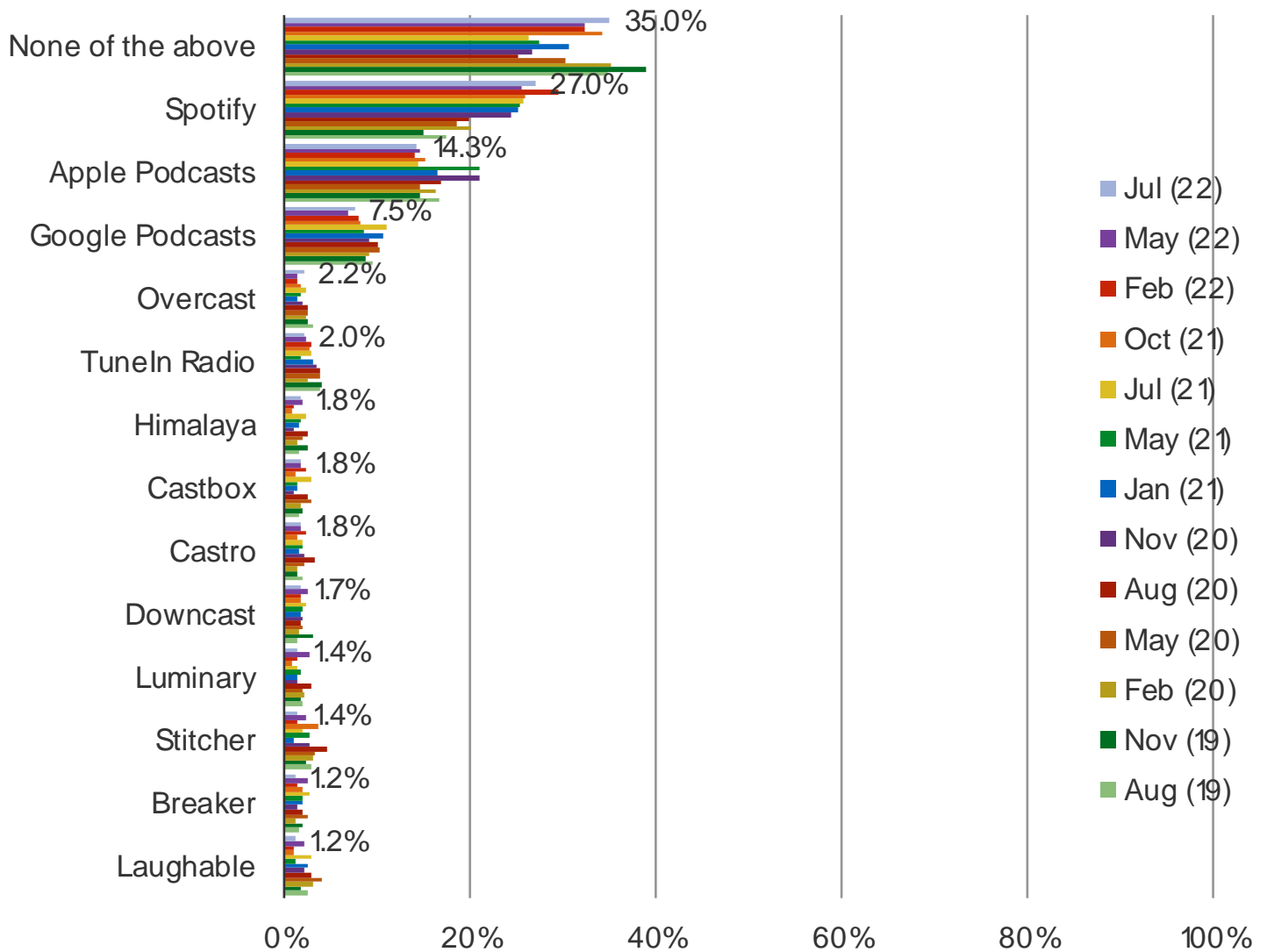
WHICH OF THE FOLLOWING PLATFORMS DO YOU USE TO LISTEN TO PODCASTS?

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



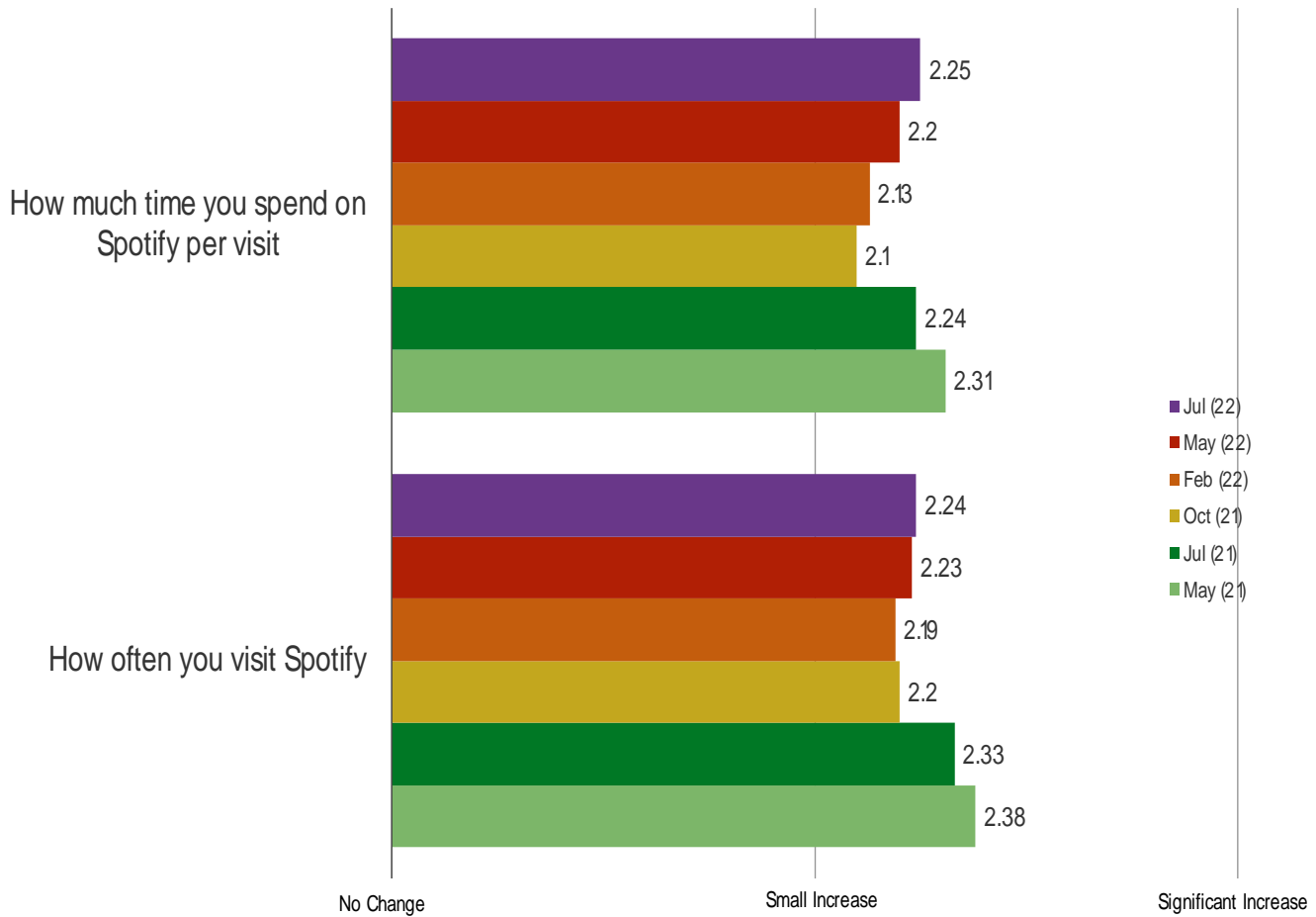
WHICH OF THE FOLLOWING HAS THE MOST UNIQUE PODCAST CONTENT THAT YOU CANNOT FIND ON OTHER PLATFORMS?

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...

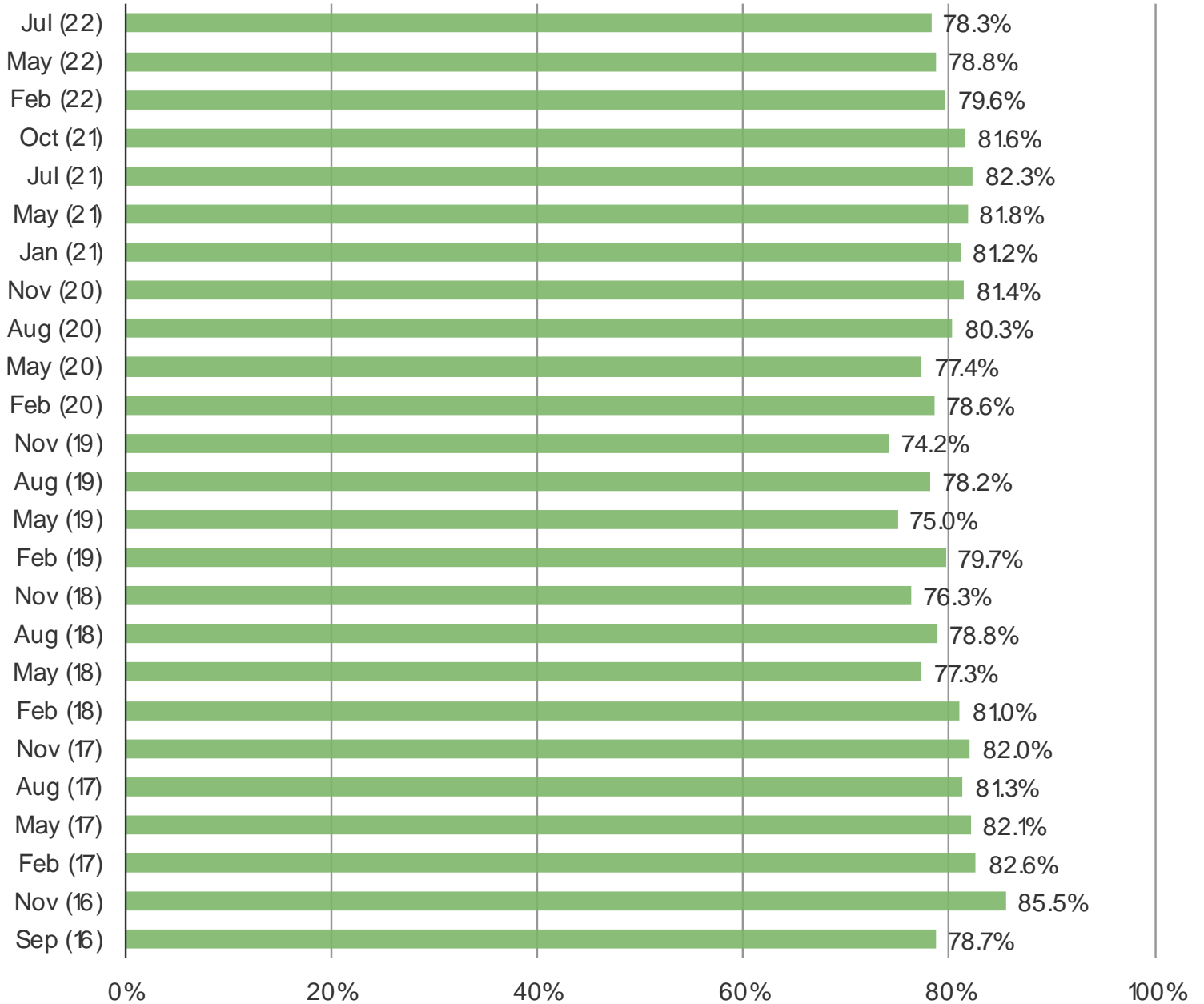
Posed to respondents who listen to Joe Rogan at least somewhat frequently



CONNECTED CAR

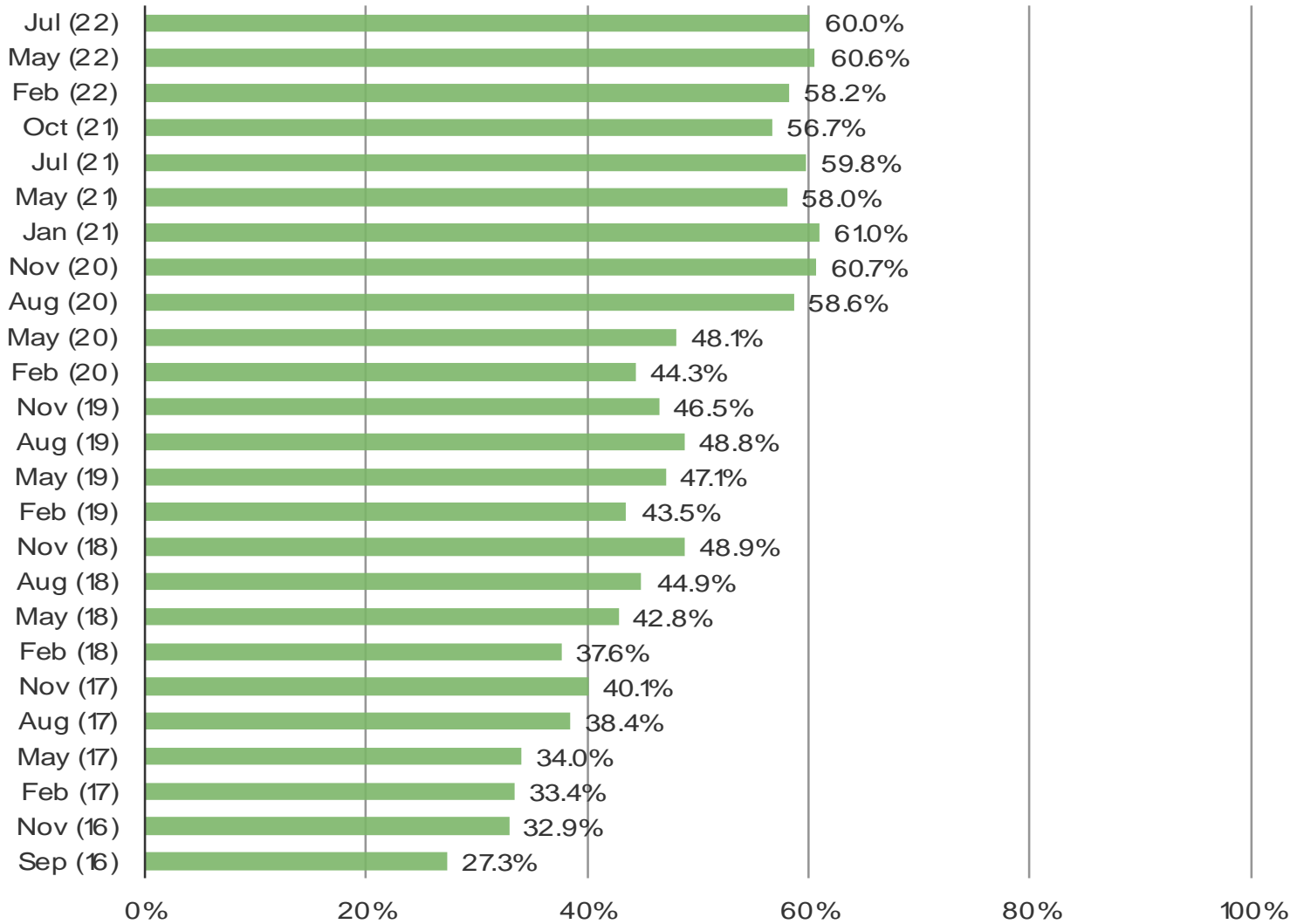
OWNS OR LEASES A CAR

Posed to all respondents



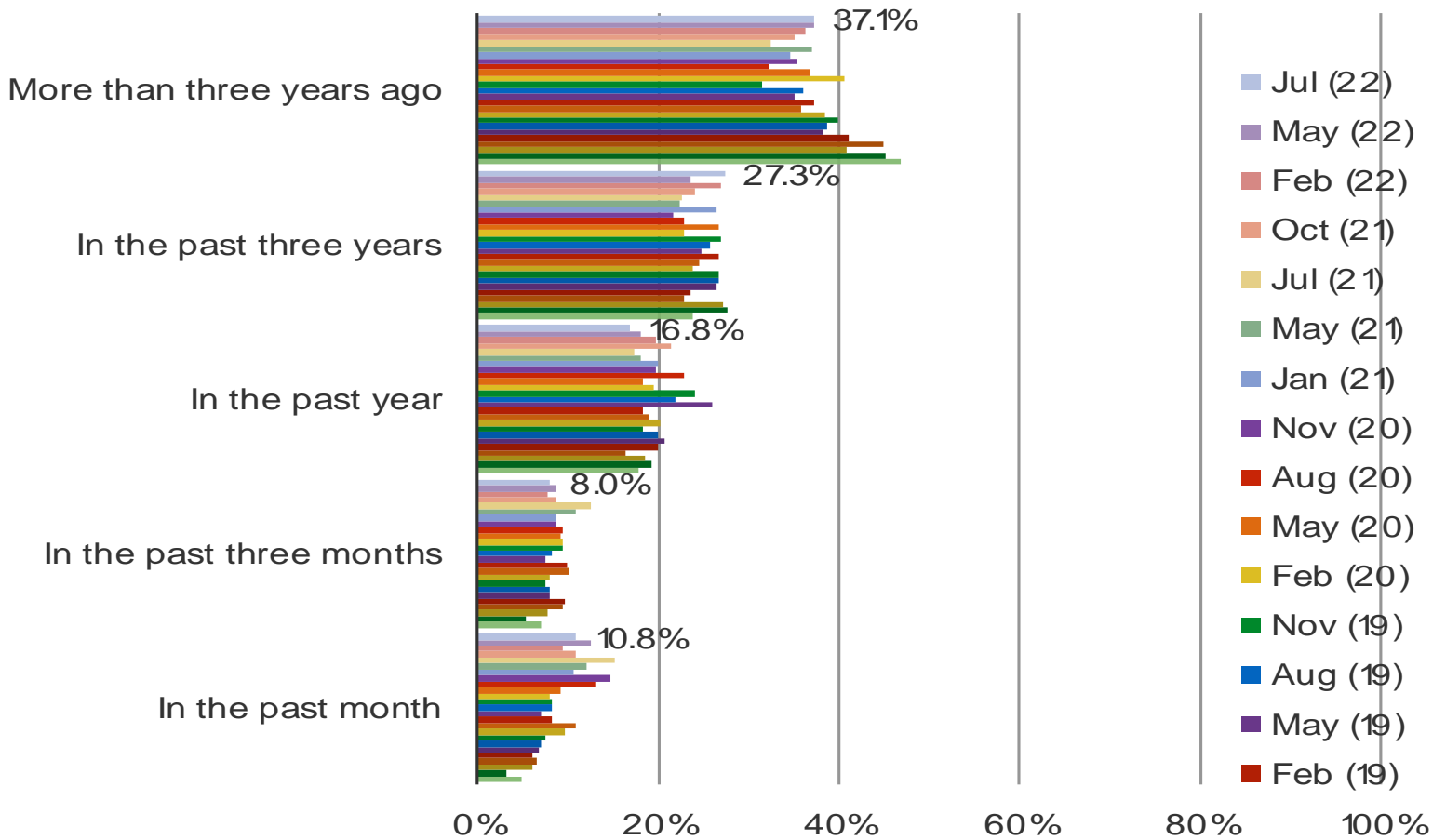
DO YOU EVER CONNECT A SMARTPHONE TO LISTEN TO MUSIC APPS IN YOUR CAR LIKE SPOTIFY, PANDORA, APPLE MUSIC, ETC?

Posed to all respondents who own / lease a car



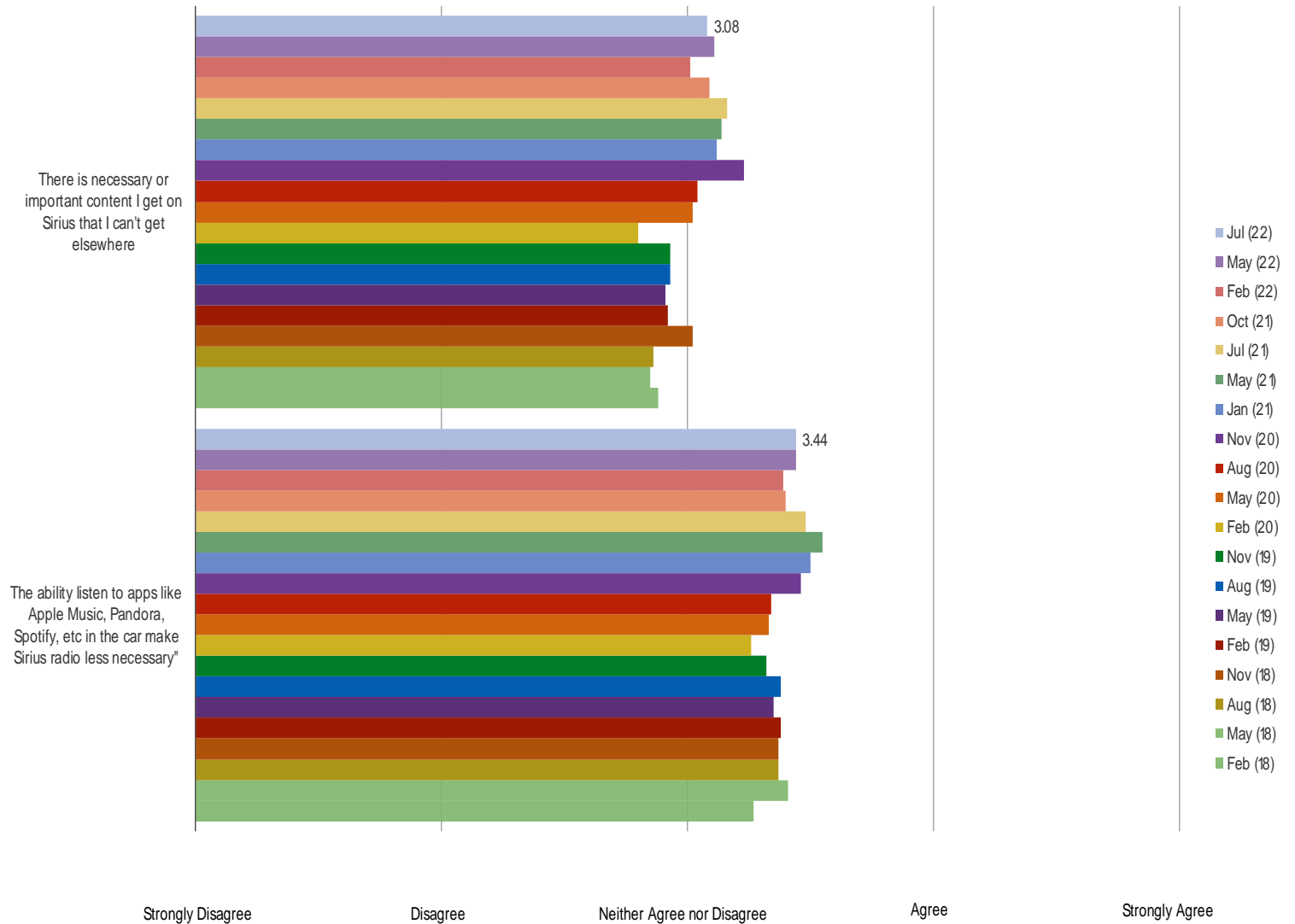
WHEN IS THE LAST TIME YOU PURCHASED OR LEASED A CAR?

Posed to all respondents who own / lease a car



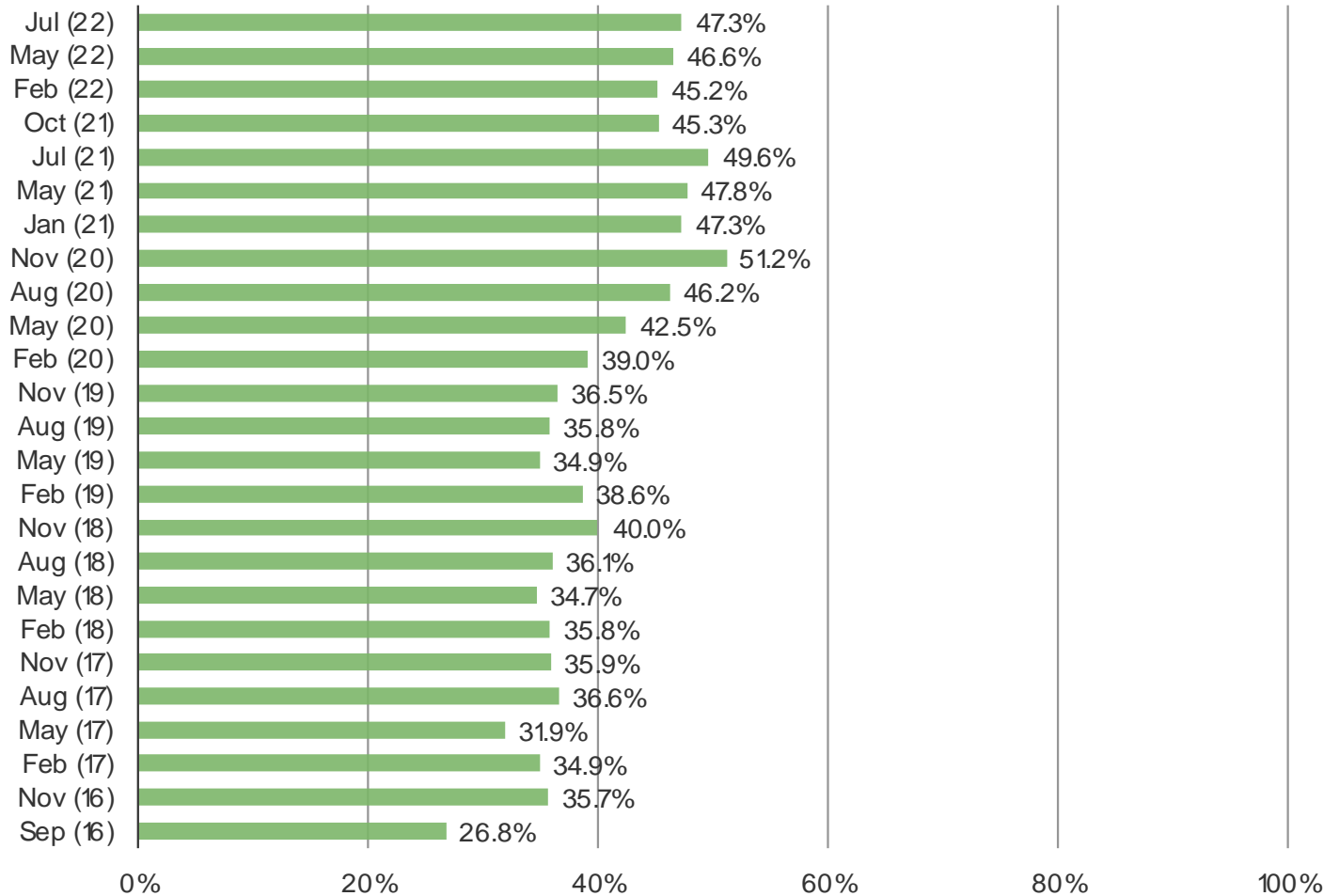
HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS:

Posed to all respondents who own / lease a car



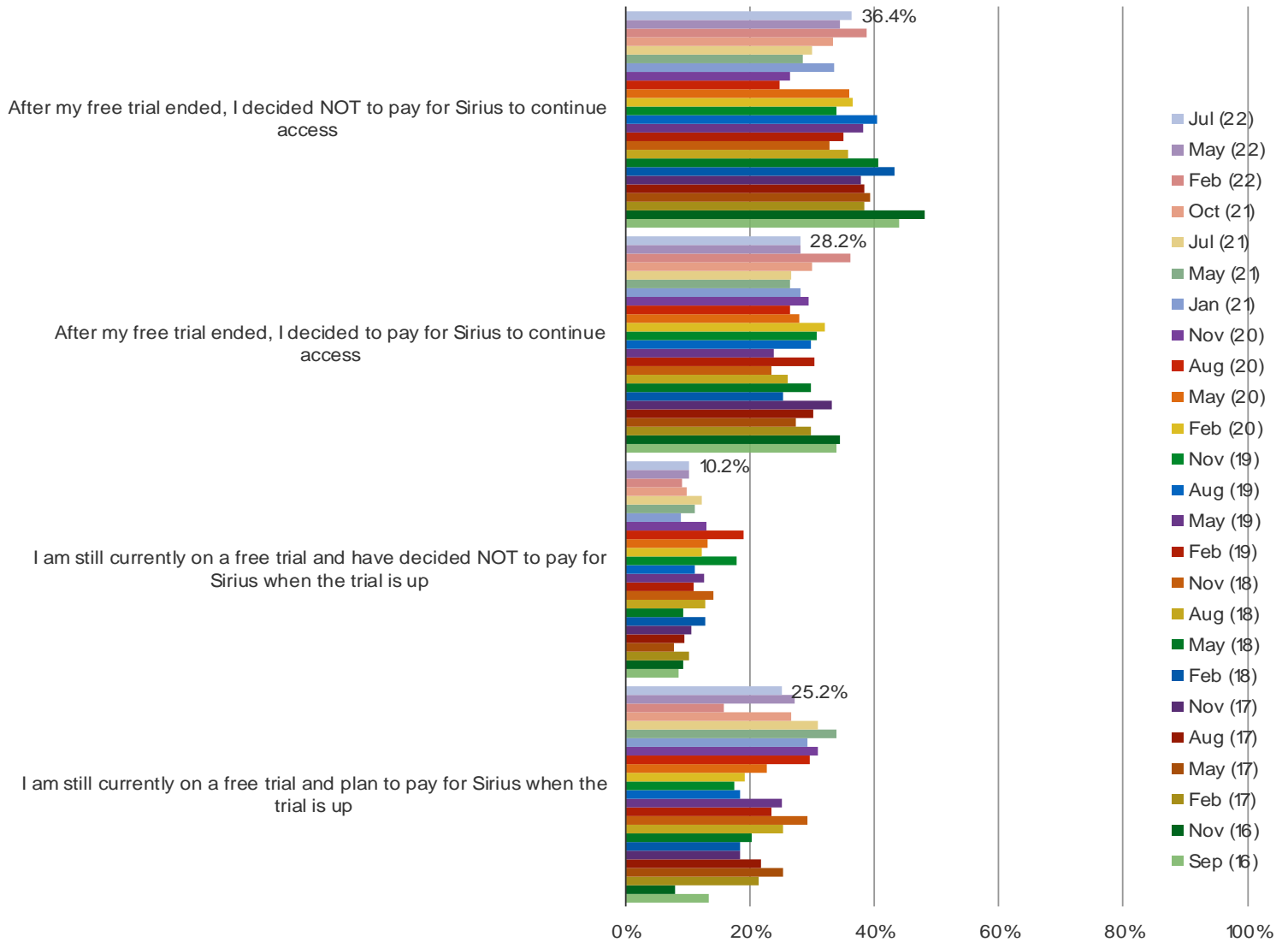
WHEN YOU MOST RECENTLY LEASED OR BOUGHT A CAR, DID IT COME WITH A FREE TRIAL TO SIRIUS RADIO?

Posed to all respondents who own / lease a car



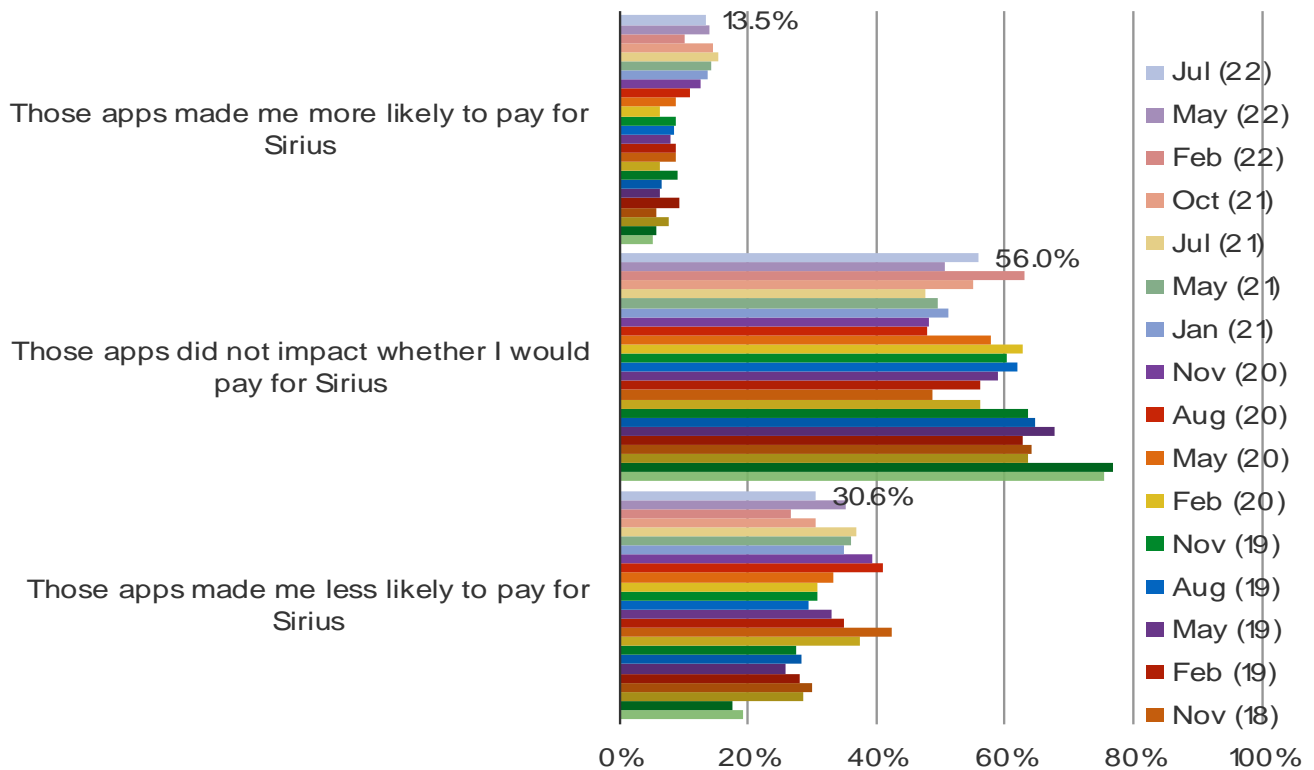
WHEN THE FREE TRIAL WAS UP, WHAT DID YOU DO?

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?

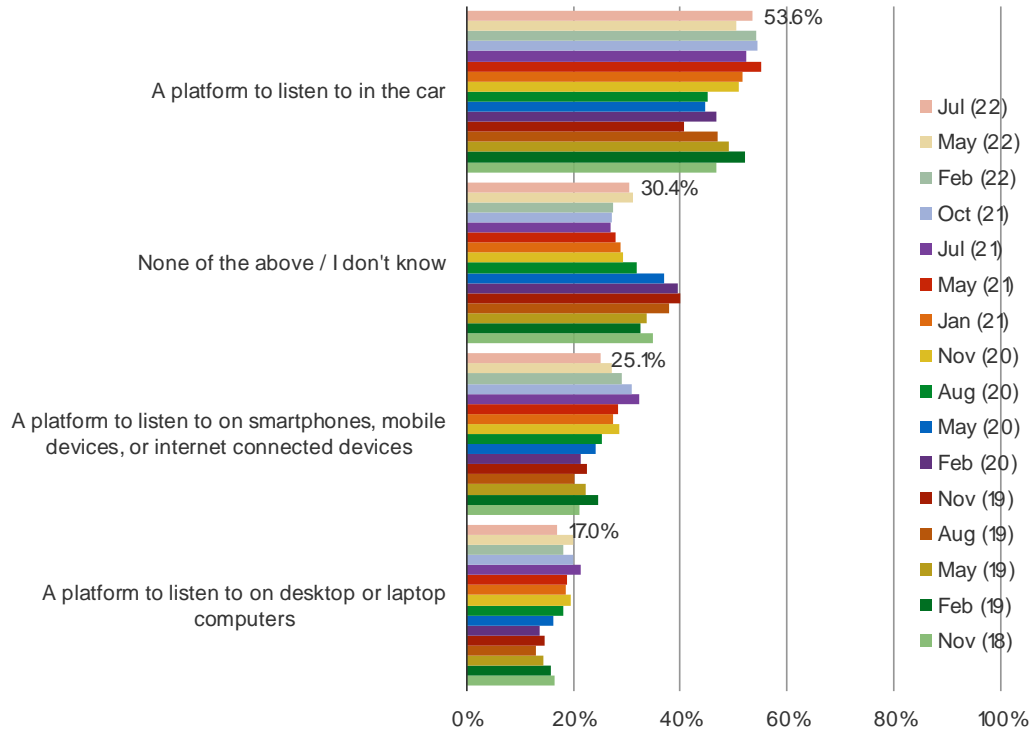
Posed to respondents who had/have a free trial when they most recently got a new car.



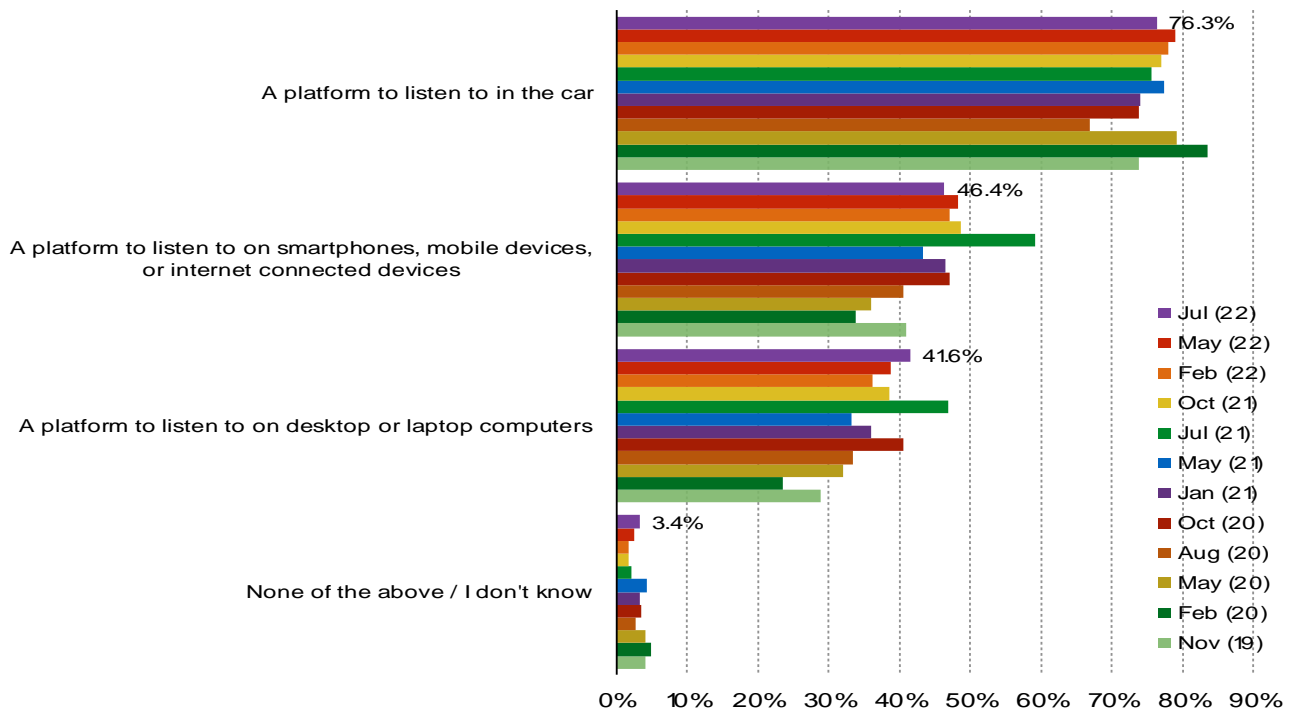
SIRIUS XM

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

Posed to all respondents.

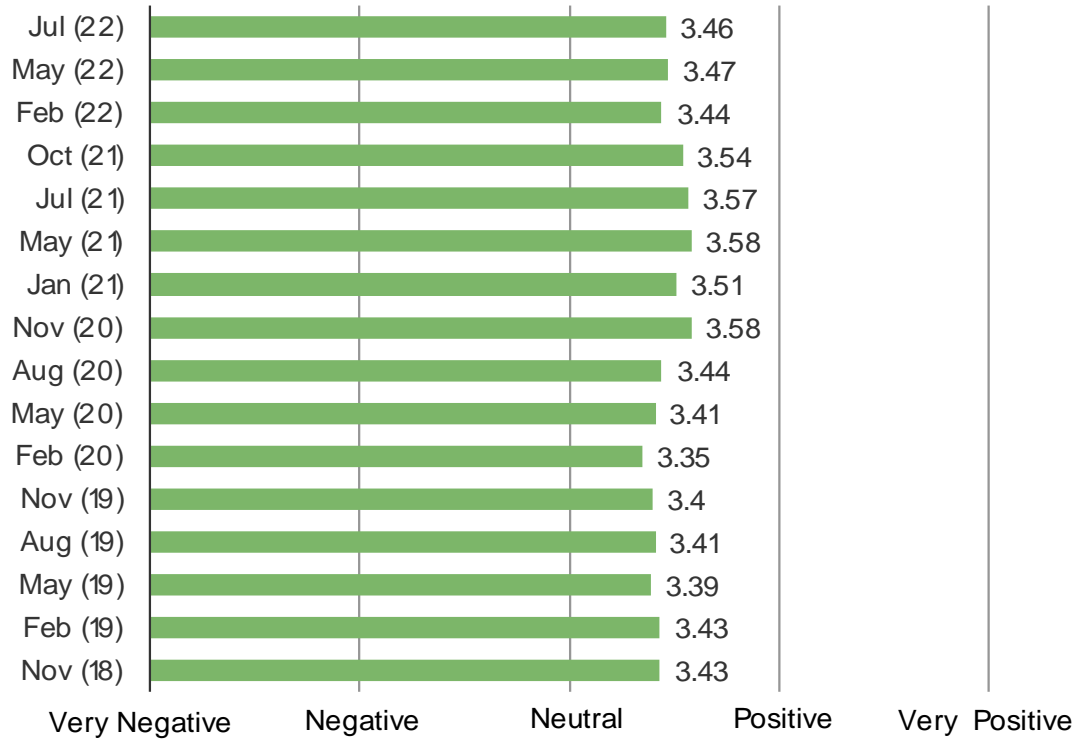


Posed to paying Sirius subscribers.

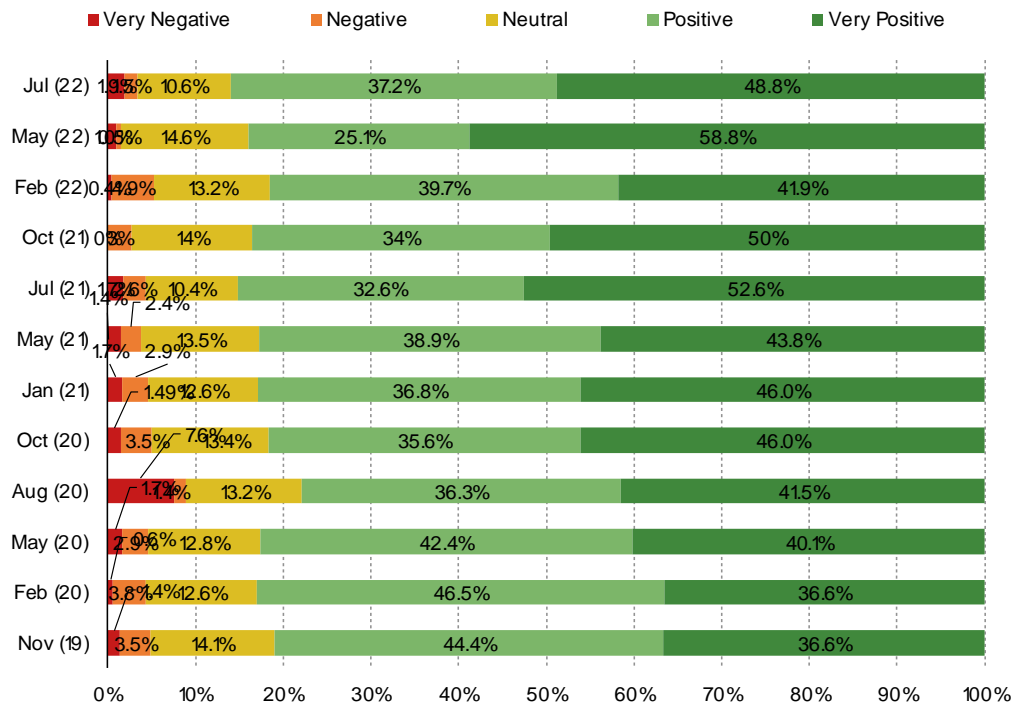


WHAT IS YOUR PERCEPTION OF SIRIUS XM?

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.

Costly, with not much benefit.

The quality of it.

Too expensive

Cost

I don't want to pay for radio.

I don't like it I just don't like live Podcast all that stuff I really click about and listen to what I want to listen to

As previously stated, their sales team is overly aggressive and they continually called and emailed me despite my stated wishes.

I think it's over priced

Price

They just keep increasing the price

Costs too much

I haven't had a good experience

It has too many advertisements and reception is awful in certain places.

There prices have gone up way to high

I don't want to pay for the service. It's overpriced

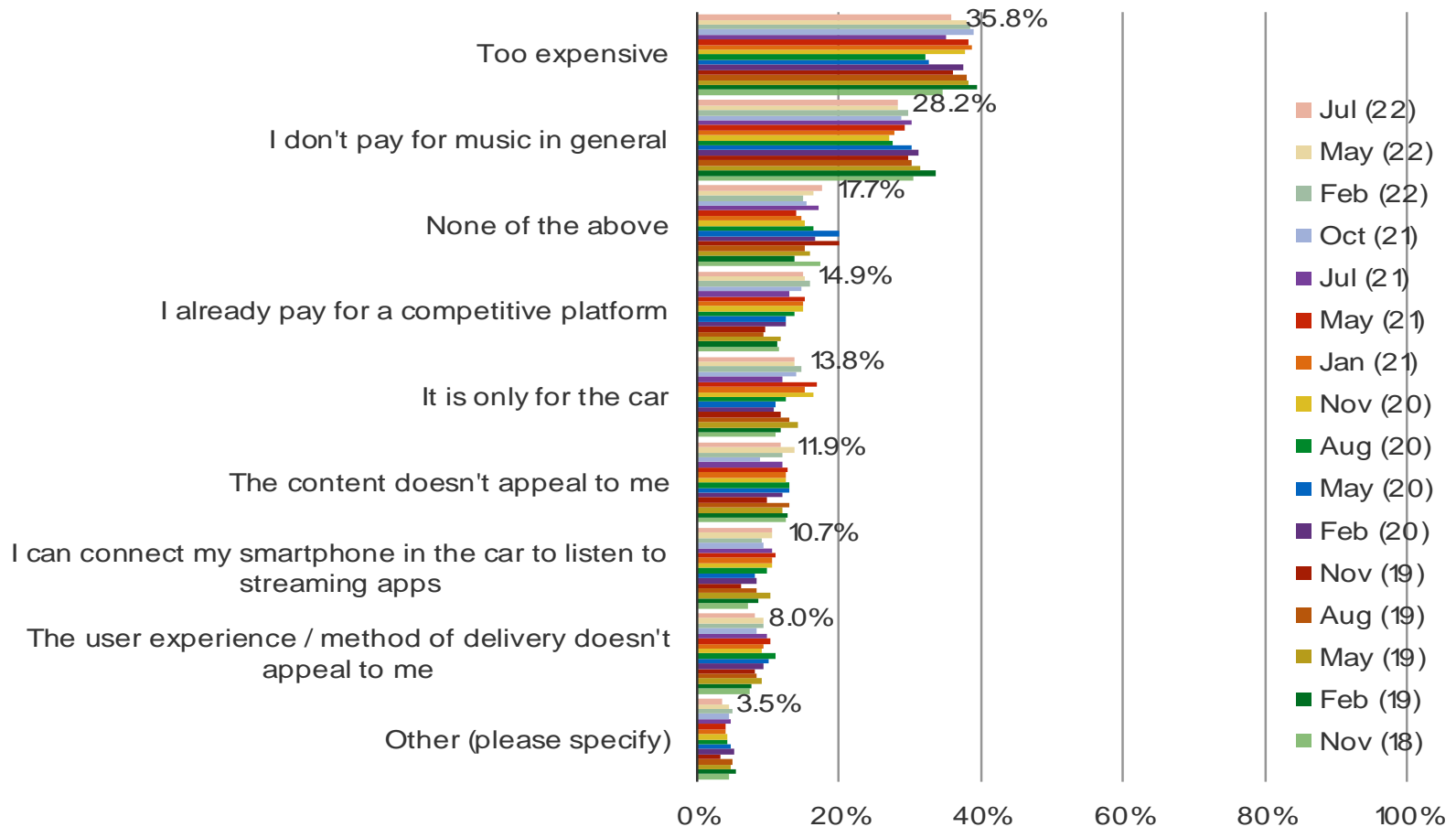
They endorse Howard Stern

Over priced only for cars and I can get better other places

Pushy

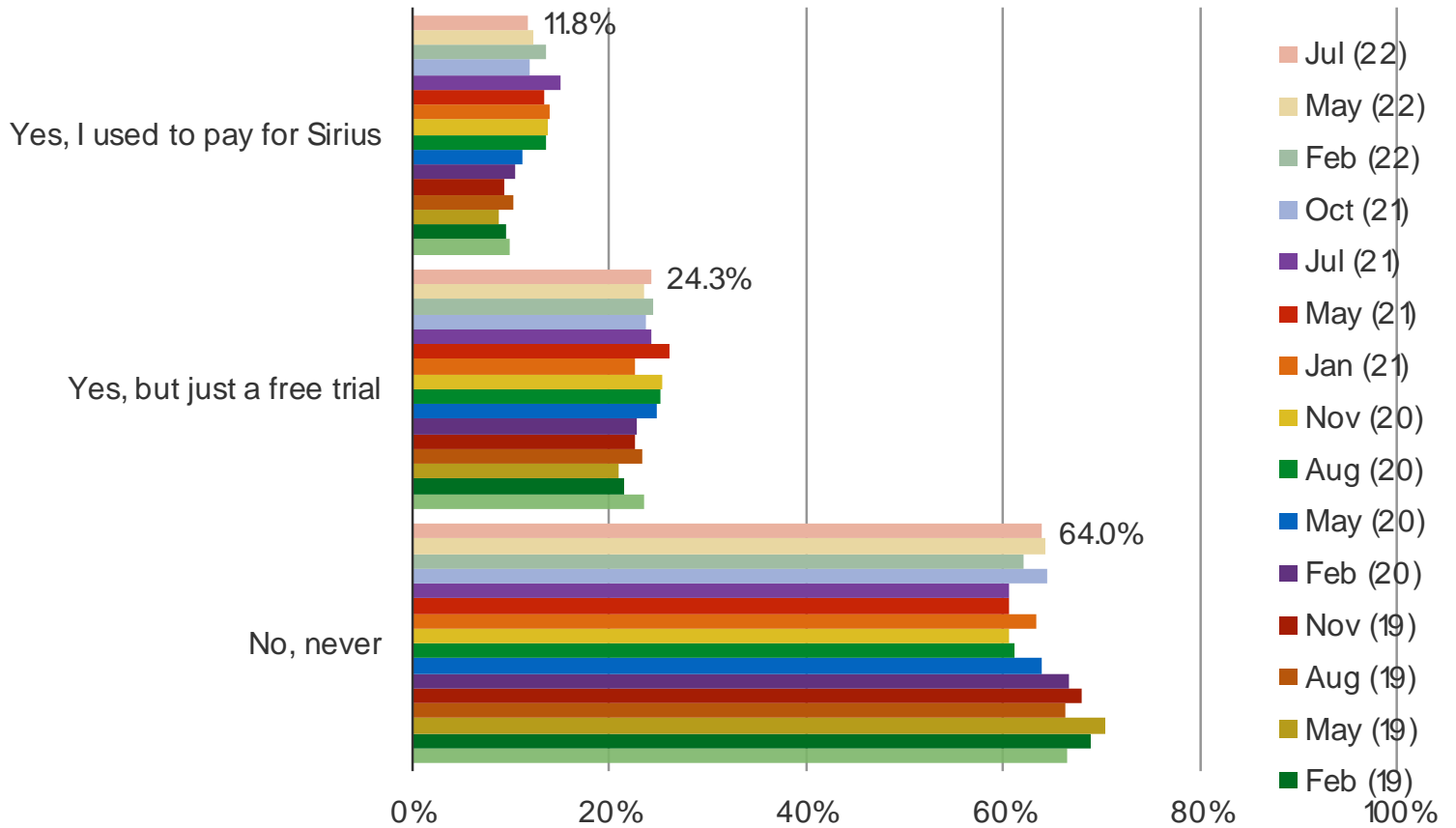
WHY ARE YOU NOT A SIRIUS XM SUBSCRIBER? (SELECT ALL THAT APPLY)

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



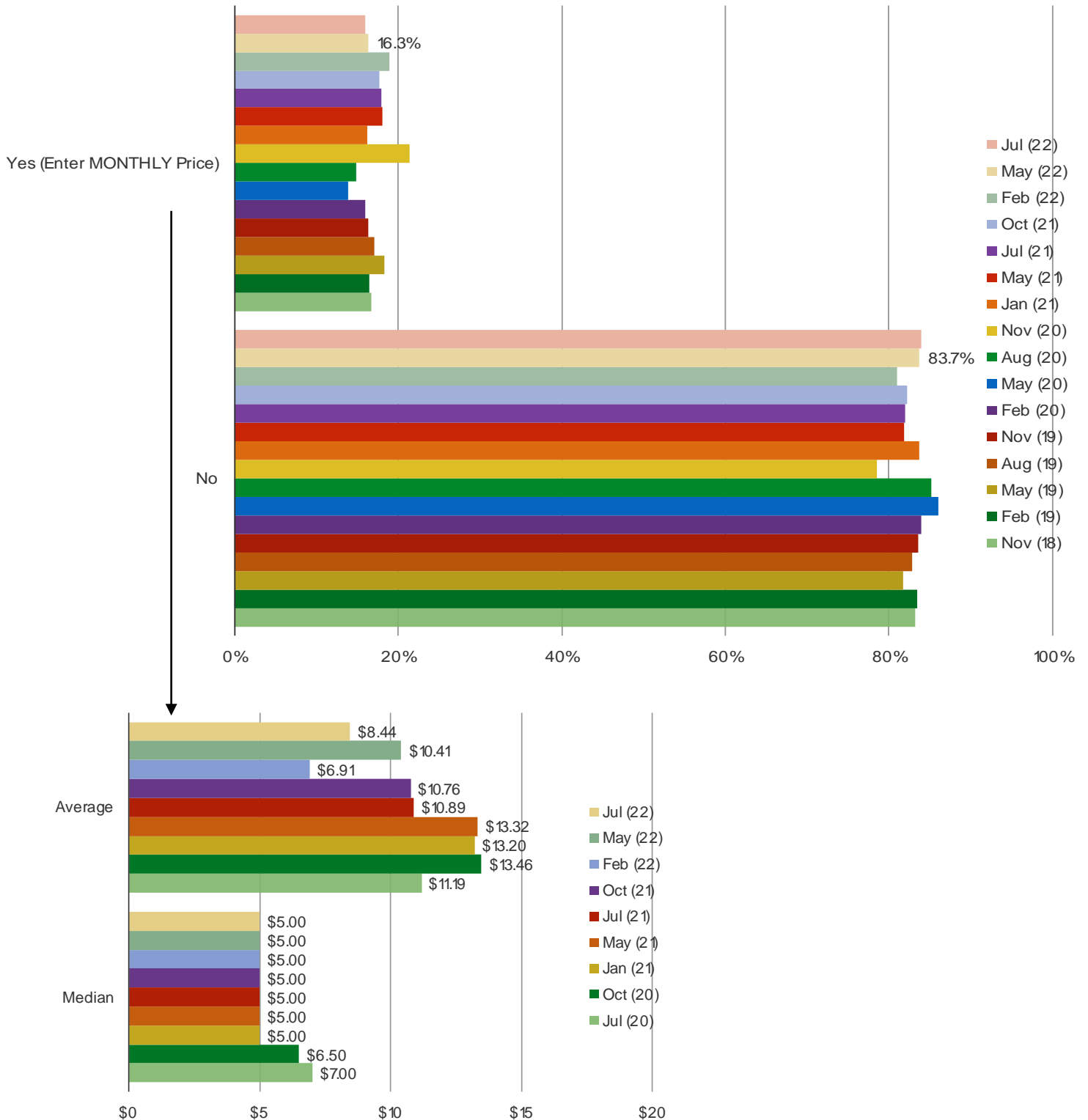
HAVE YOU EVER BEEN A SIRIUS XM SUBSCRIBER?

Posed to non-Sirius XM subscribers.



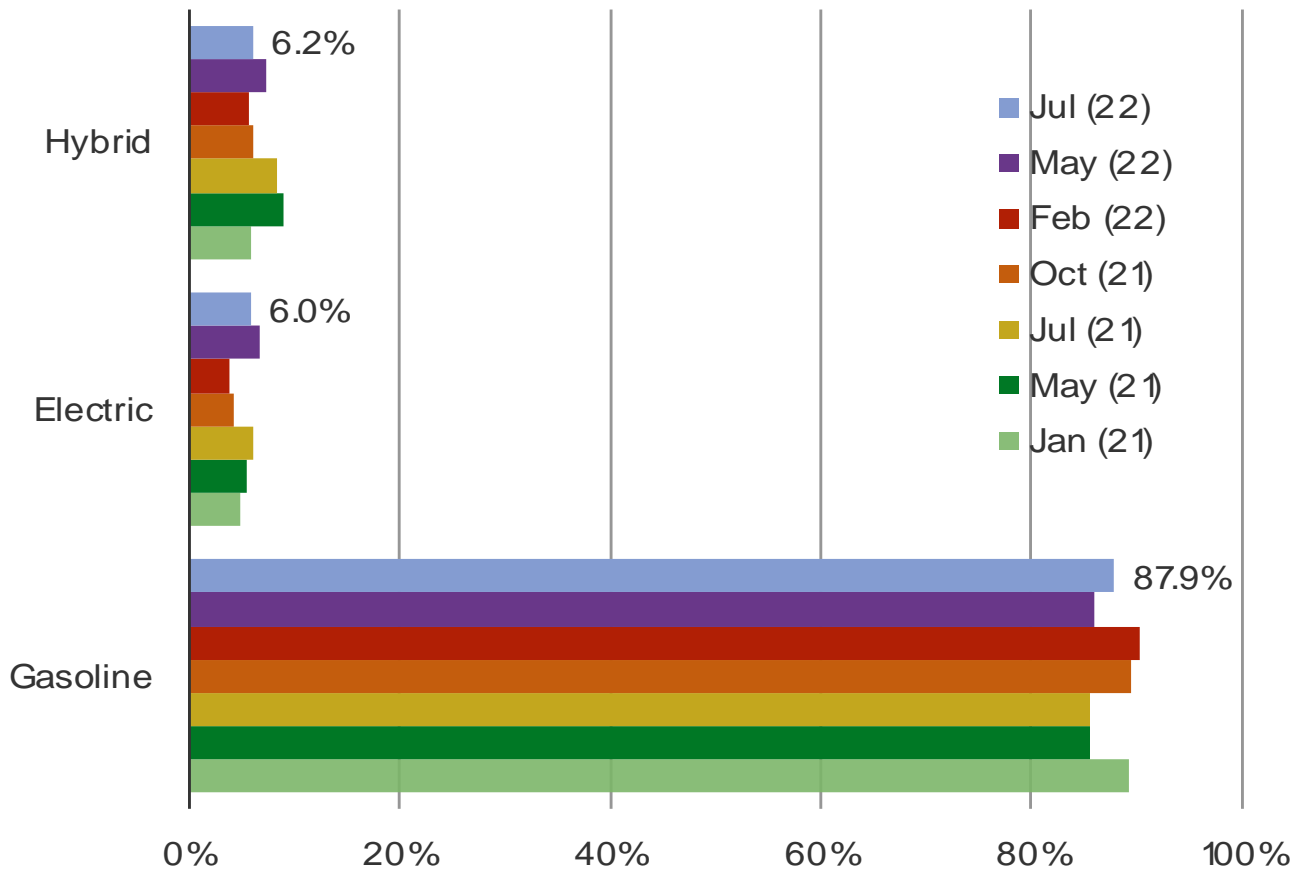
WOULD THERE BE ANY PRICE POINT (PER MONTH) WHERE YOU WOULD DECIDE TO SUBSCRIBE TO SIRIUS XM?

Posed to non-Sirius XM subscribers.



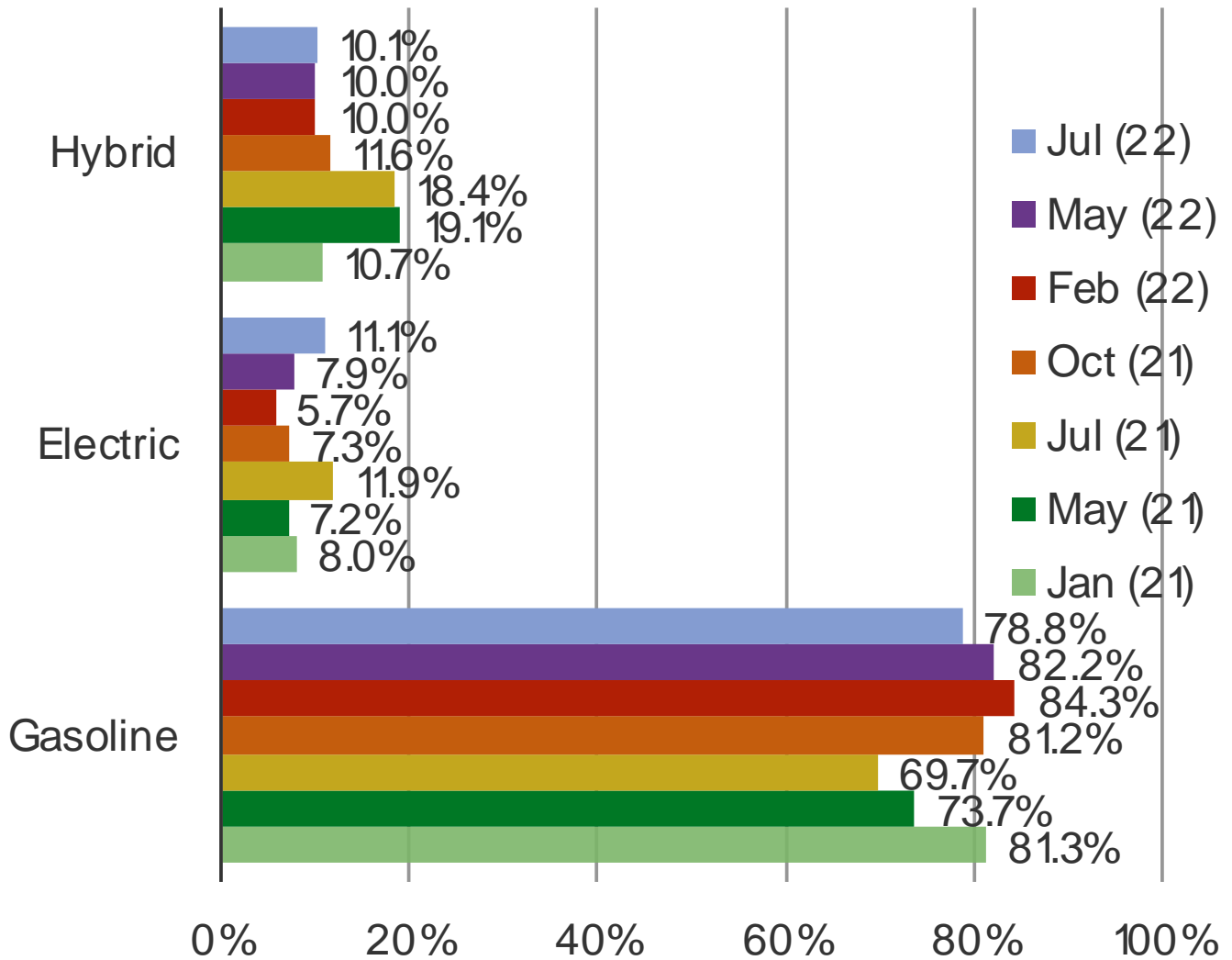
IS YOUR CAR AN ELECTRIC VEHICLE OR DOES IT RUN ON GAS?

Posed to auto owners.



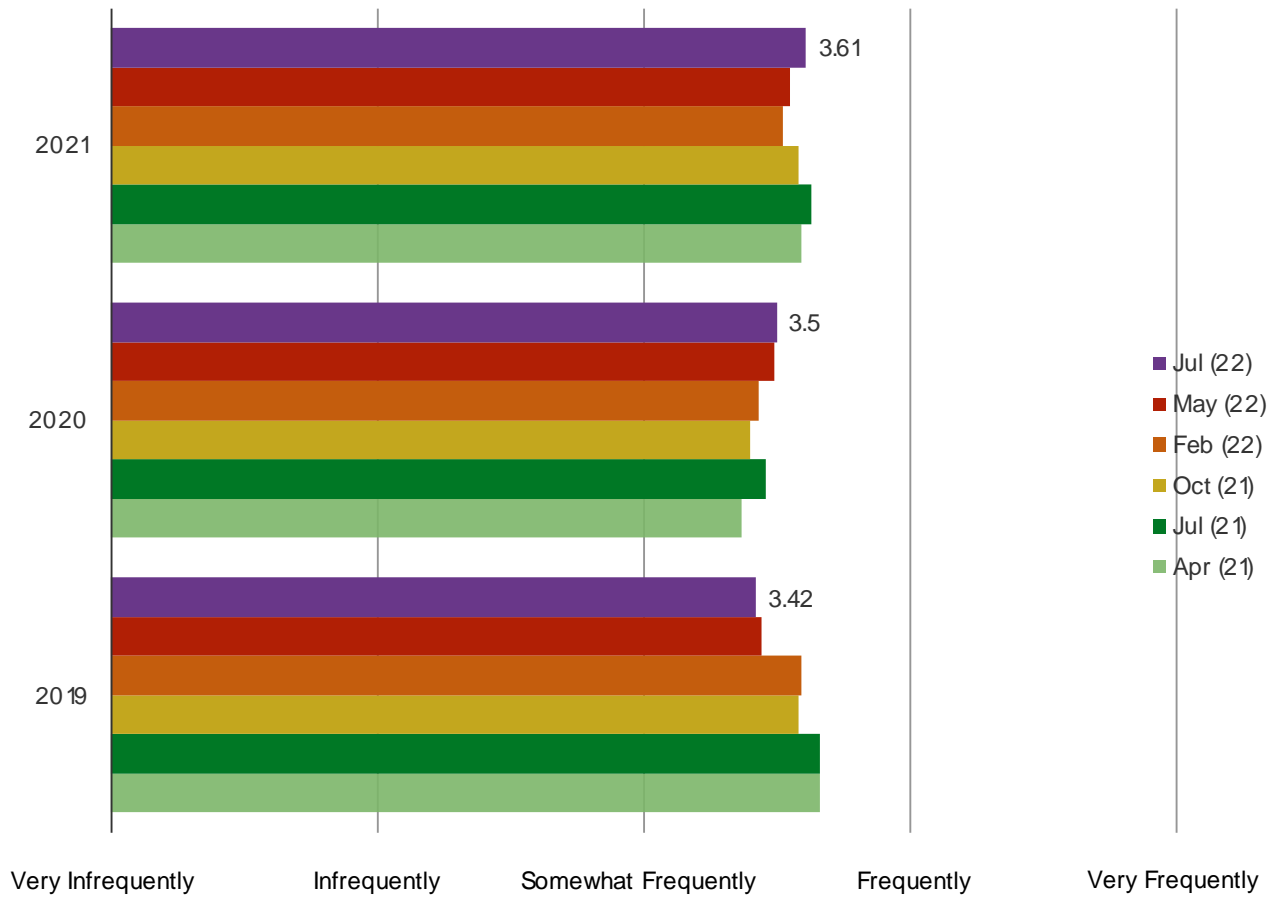
IS YOUR CAR AN ELECTRIC VEHICLE OR DOES IT RUN ON GAS?

Posed to auto who pay for a Sirius account currently.



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

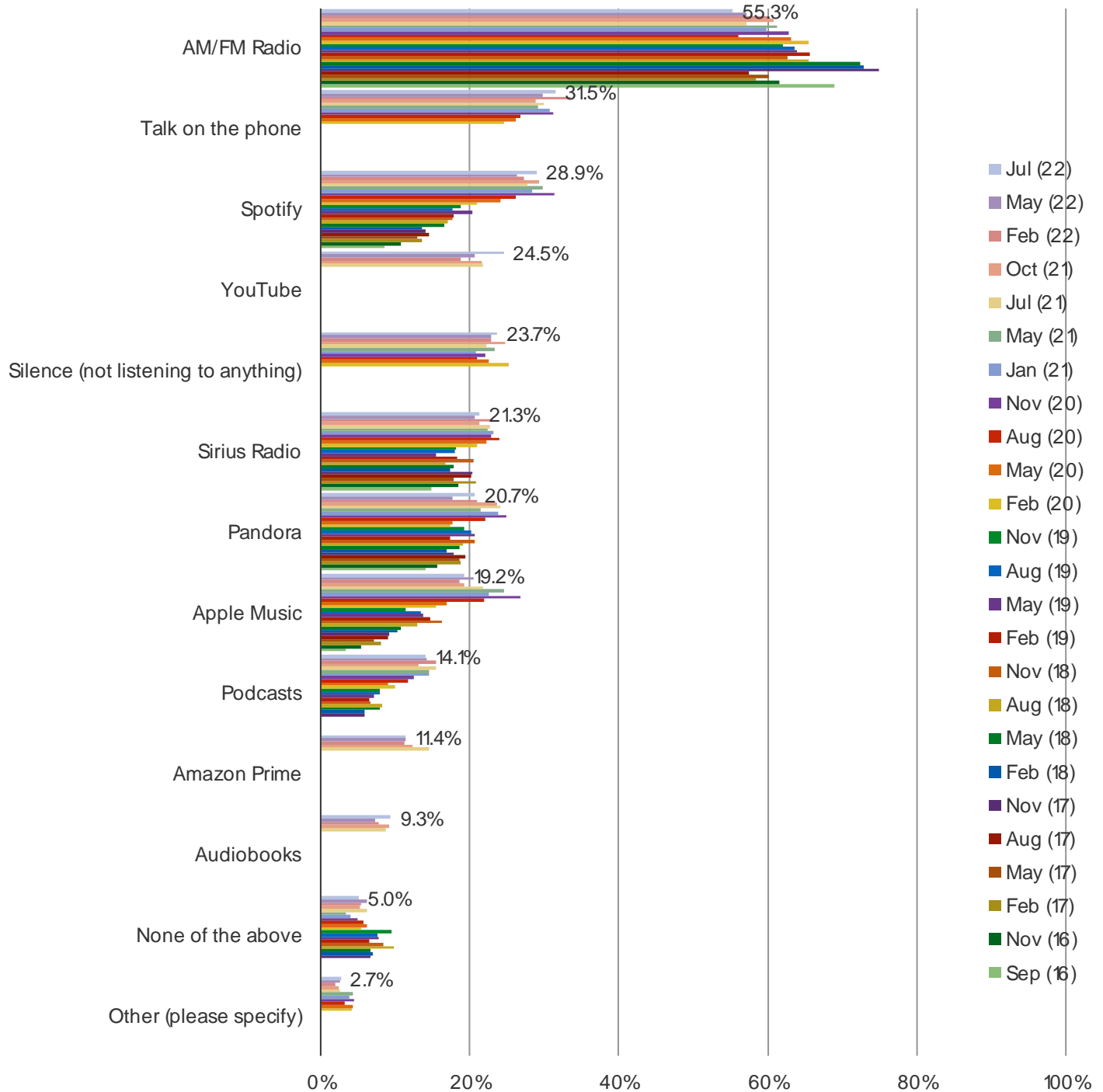
Posed to auto owners.



MARKET SHARE IN THE CAR

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

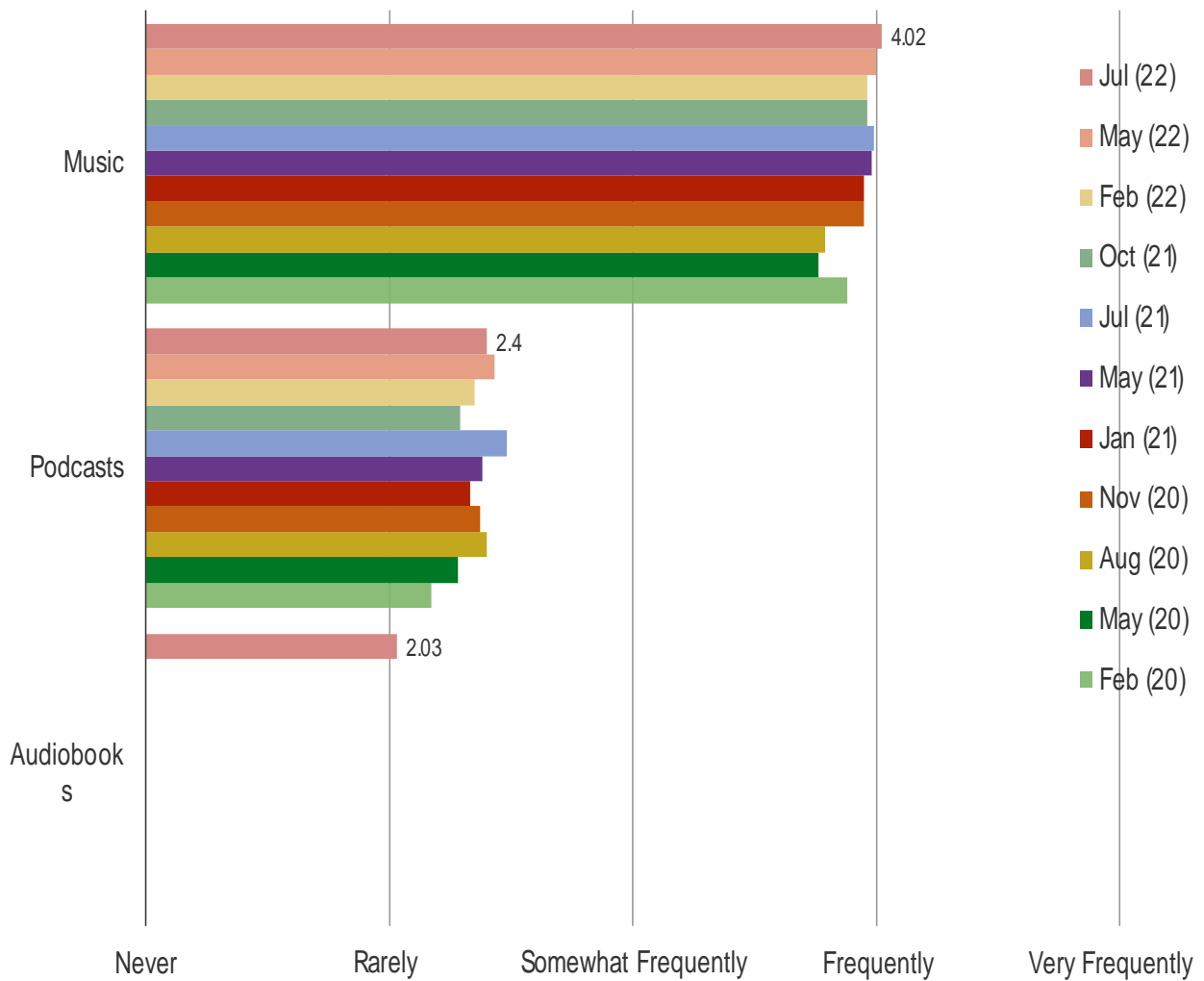
Posed to all respondents who own / lease a car



AIRPODS

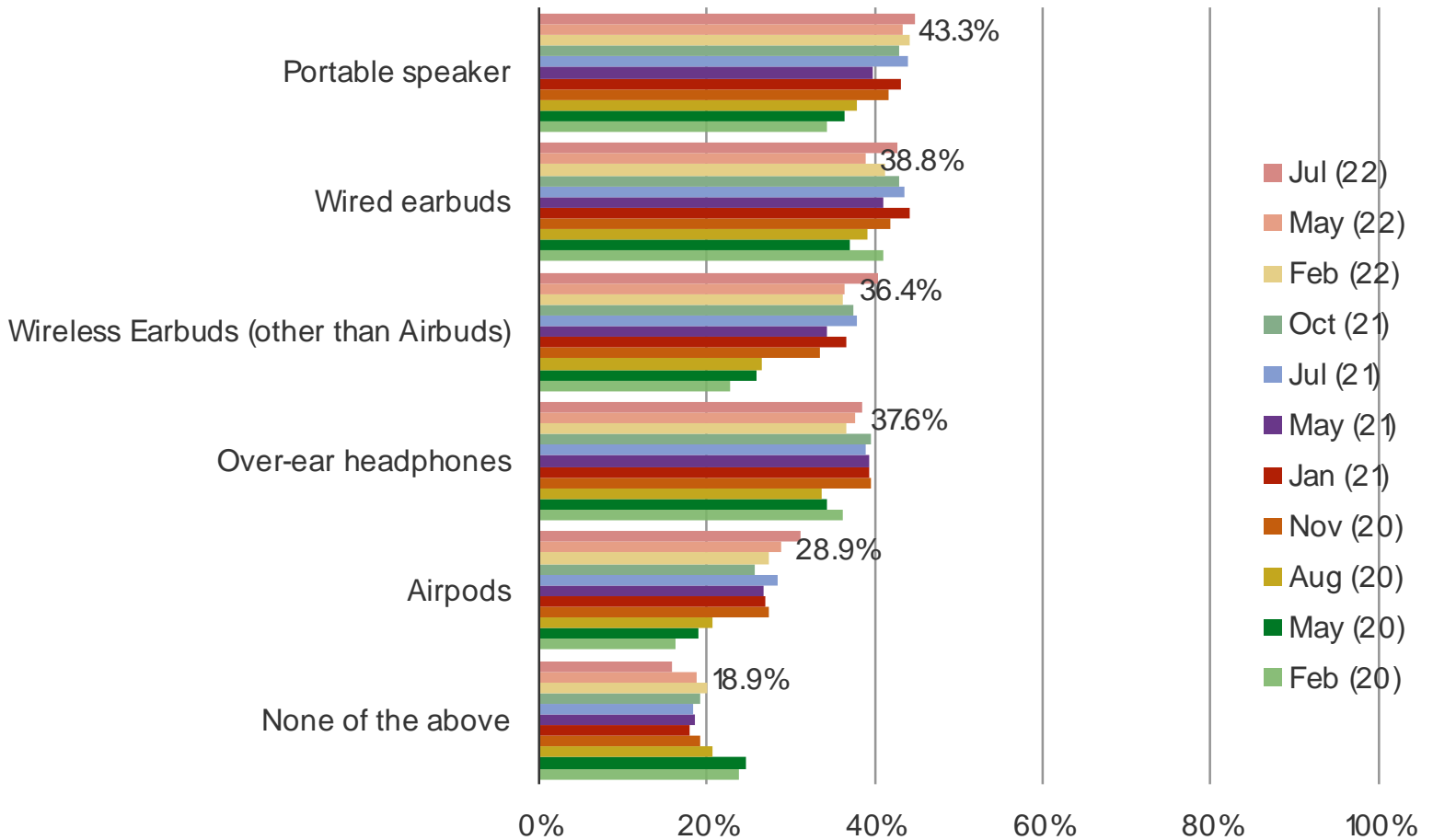
HOW OFTEN DO YOU LISTEN TO...

Posed to all respondents



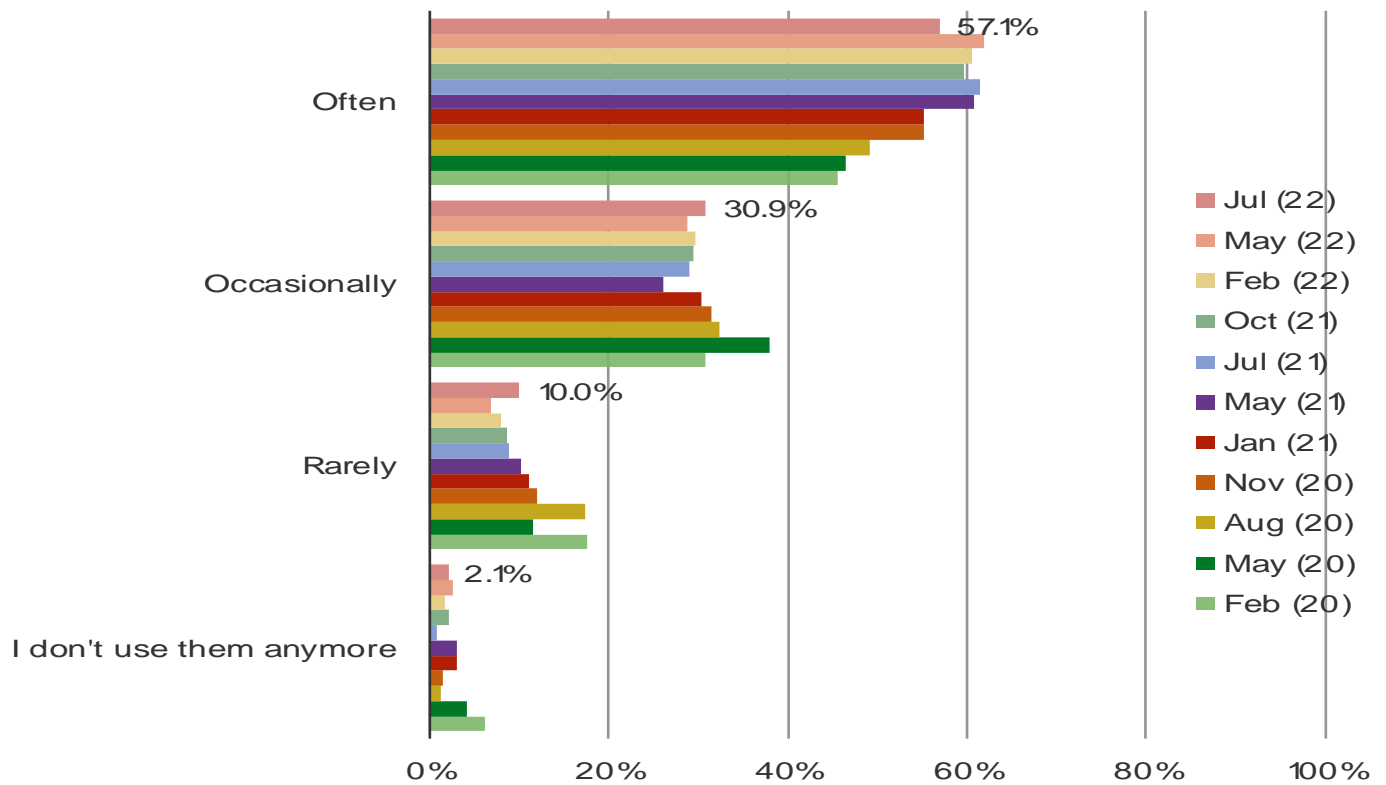
DO YOU OWN ANY OF THE FOLLOWING?

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

