

Bespoke Survey Research

October 2023

Radio and Streaming Music

Volume 29 | Quarterly Survey

1,250 US Consumers Balanced To Census

Tickers Covered: SIRI, SPOT, AMZN, AAPL.

KPIs and Key questions

1. Overall interest in a paid TikTok streaming music app has declined relative to our July update.
2. Interest in a paid TikTok streaming music app is highest among the 18-44 year-old bucket.
3. Consumers continue to view Sirius as a platform to listen to in the car.
4. Spotify paid subscribers have a net favorable view of the rumored "Spotify Supremium" tier. 29% said they would be very likely to upgrade to it. All told, 58.3% said they would be at least somewhat likely to switch to it compared to 30.4% who said they would be at least somewhat unlikely to switch to it.
5. The top drivers for consumers when it comes to which streaming music platforms they use include variety, ease of use, price, and no ads.
6. Some of the engagement metrics that we track for Spotify softened a touch this wave relative to last, but nothing significantly off historical readings. Additionally, sentiment based questions about Spotify were in-line to better than normal.

Noteworthy Stats:

13.4% Of respondents note that they have a Spotify account.

24.9% Of respondents note that they have an Apple Music account.

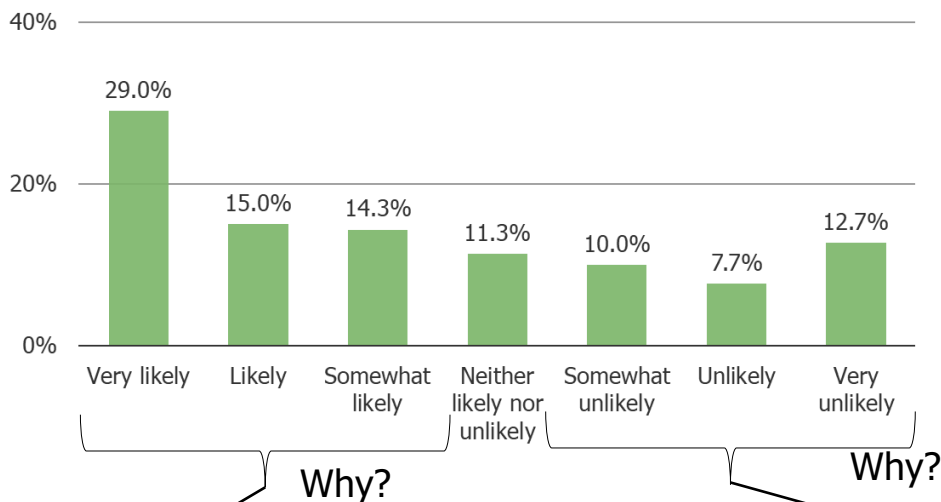
9.8% Of respondents are extremely interested in a paid only streaming music app from TikTok.

SPOTIFY APP REDESIGN AND FEATURE TESTING

Radio and Streaming Music

HOW LIKELY WOULD YOU BE TO SWITCH TO A HIGHER LEVEL OF SPOTIFY PREMIUM ("SPOTIFY SUPREMIUM) FOR \$19.99 PER MONTH FOR FEATURES THAT WOULD INCLUDE "HIFI", HIGH FIDELITY AUDIO, LOSSLESS AUDIO, AI GENERATED PLAYLISTS, STUDIO SOUND, HEADPHONE TUNER, LIBRARY PRO?

Posed to respondents who have a paid account with Spotify... (N = 300)



Why?

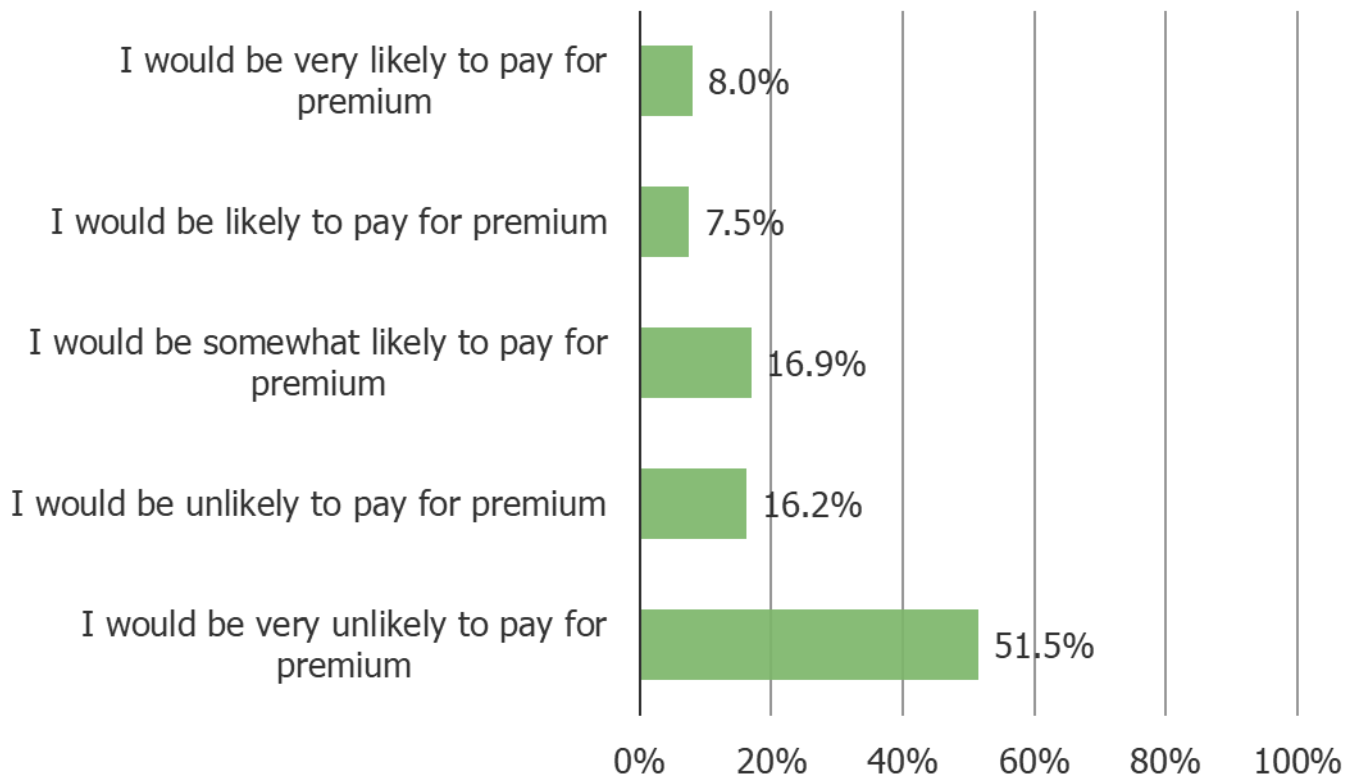
- a very good choice for me
- Already paid for this
- As a lifelong musician I appreciate the sudelties of music.
- Because i love music services
- Because they give me a good services
- Because this is a good value service.
- Better quality
- Better sound is very important
- Extraordinary
- For better quality and sound
- Higher quality should mean a pay bump
- I love it
- I want my music as clear as possible
- I would consider it if they had a reasonable family version. We currently have a family account.
- It has higher streaming quality which is always good for me who listen to music alot.

Why?

- 20 is a high amount for it maybe 15
- Because I don't have the money for it
- Because I just like the music
- Cause of the cost
- Don't need higher quality.
- I am satisfied with my single subscription
- I am satisfied with what I have
- I don't like paying subscriptions
- I don't like the idea of spending that much on a subscription, however, the appeal to have free audiobooks is high for me.
- I don't need those extras
- I don't want to pay more than I do now
- I just want music
- I must stay within my budget.
- I rather just que a playlist on YouTube.
- I'm fine with the current package
- I'm happy with my current service
- It's just not something I can personally afford
- Limited financial resources
- My current income won't allow for the extra \$20 a month payment
- My income is limited and I have to be careful how much I spend on my subscription services.
- Not paying for that
- Not paying that much!
- Seems expensive
- that is a lot of money
- that is starting to get too expensive
- That's expensive
- Too expensive
- Too expensive
- Too expensive
- Way too expensive for not enough things I would want to use

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)

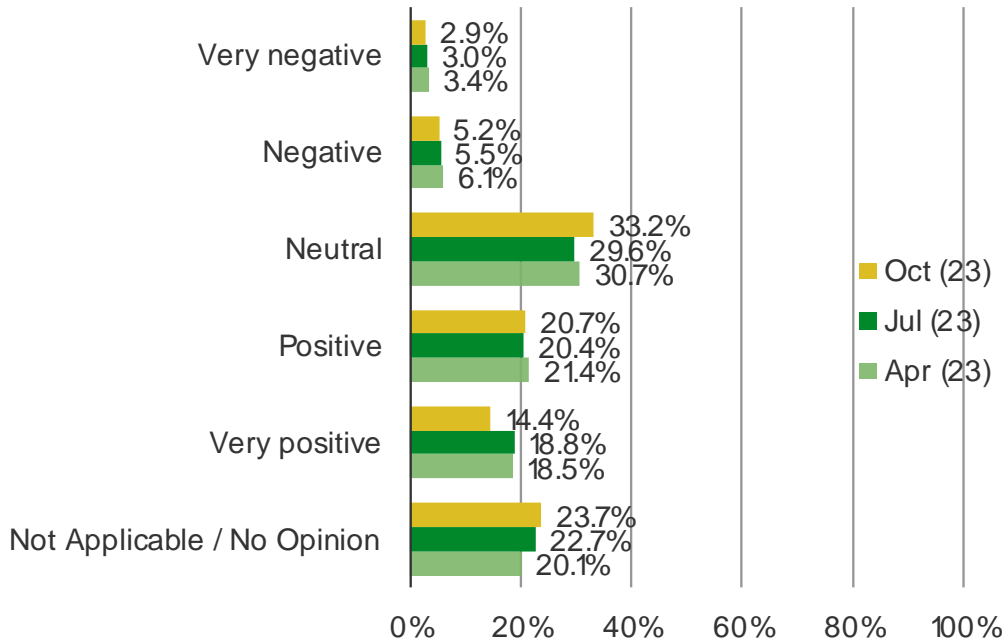
Posed to respondents who do not have an account with Spotify and Spotify Free Account Holders (N = 952)



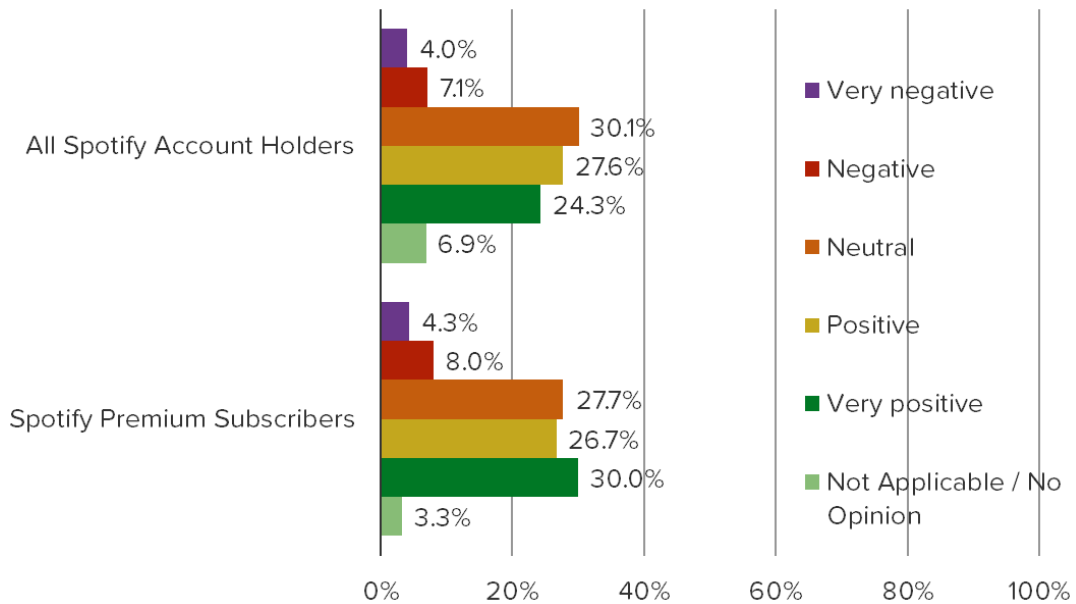
Radio and Streaming Music

SPOTIFY IS IN THE PROCESS OF ROLLING OUT A NEW APP DESIGN, INCLUDING A VERTICAL HOME SCREEN THAT RESEMBLES TIKTOK AND INSTAGRAM. THE SCROLLING FEED WILL CONSIST OF MUSIC, PODCASTS, AND SHOWS FOR USERS TO DISCOVER. WHAT IS YOUR OPINION OF THIS CHANGE?

Posed to all respondents (N = 1252).



Posed to Spotify Account Holders (All, and then specifically focusing on Premium subs).



SPOTIFY IS IN THE PROCESS OF ROLLING OUT A NEW APP DESIGN, INCLUDING A VERTICAL HOMESCREEN THAT RESEMBLES TIKTOK AND INSTAGRAM. THE SCROLLING FEED WILL CONSIST OF MUSIC, PODCASTS, AND SHOWS FOR USERS TO DISCOVER. WHAT IS YOUR OPINION OF THIS CHANGE?

Spotify Account Holders – Optional Comments, why they like or dislike the change.

I think content would be easier to find and access

It will be instructive, entertaining and informative

Change is great

Sounds cool

Seems more appealing

Good for music discovery

It could help me learn about new songs and unique genres of music

I like this idea for exploring new music and seeing music video content. I hope it doesn't interrupt how easy the platform is to navigate now

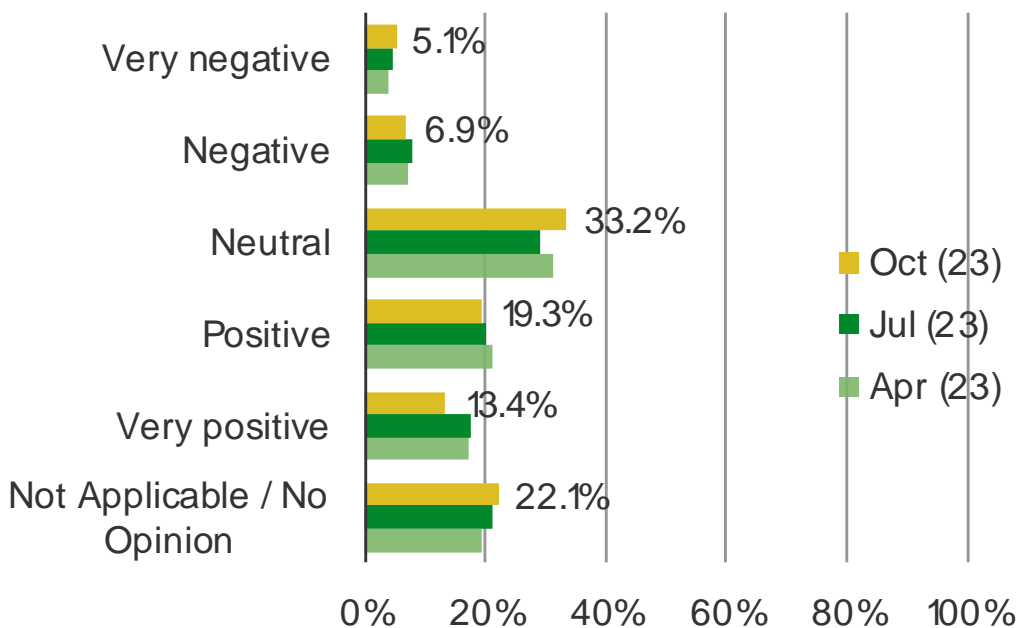
I don't need this to be social media

I don't like Instagram or TikTok

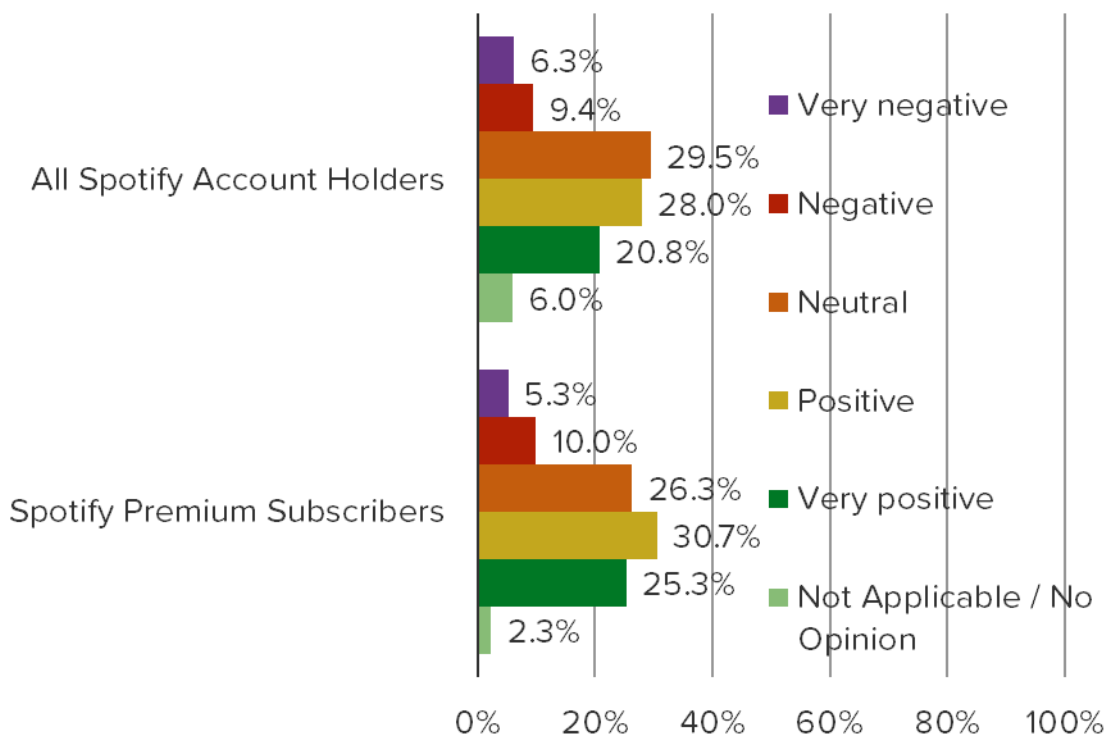
This addition will expose viewers to topics and music that they may not know they are interested in.

SPOTIFY IS ADDING A NEW PERSONAL AI DJ FOR PREMIUM SUBSCRIBERS THAT ACTS LIKE A DJ PERSONALIZING YOUR LISTENING EXPERIENCE AND TALKING TO YOU LIKE A DJ TYPICALLY WOULD WHILE THEY PLAY MUSIC FOR YOU. WHAT IS YOUR OPINION OF THIS NEW FEATURE?

Posed to all respondents (N = 1252).



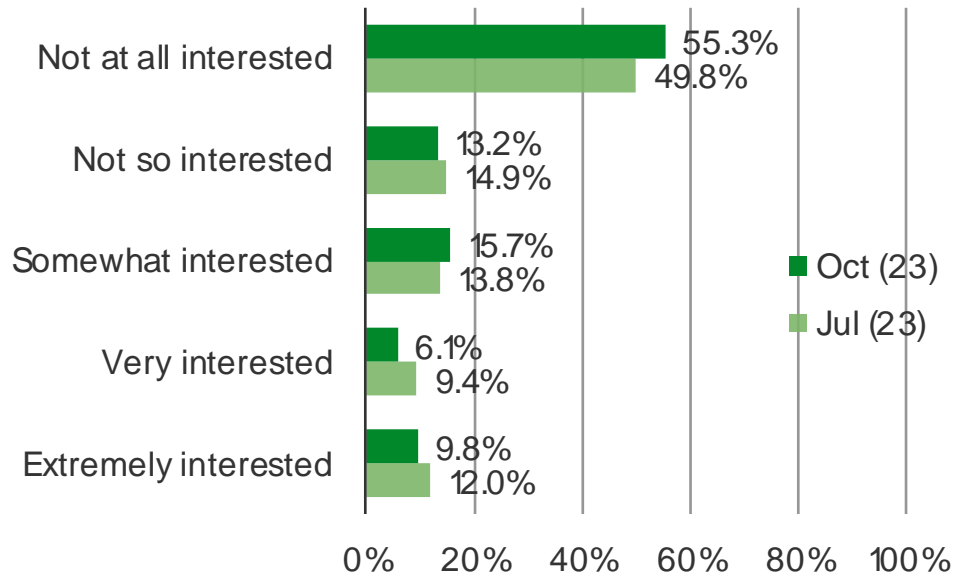
Posed to Spotify Account Holders (All, and then specifically focusing on Premium subs).



TIKTOK MUSIC COMPETITION

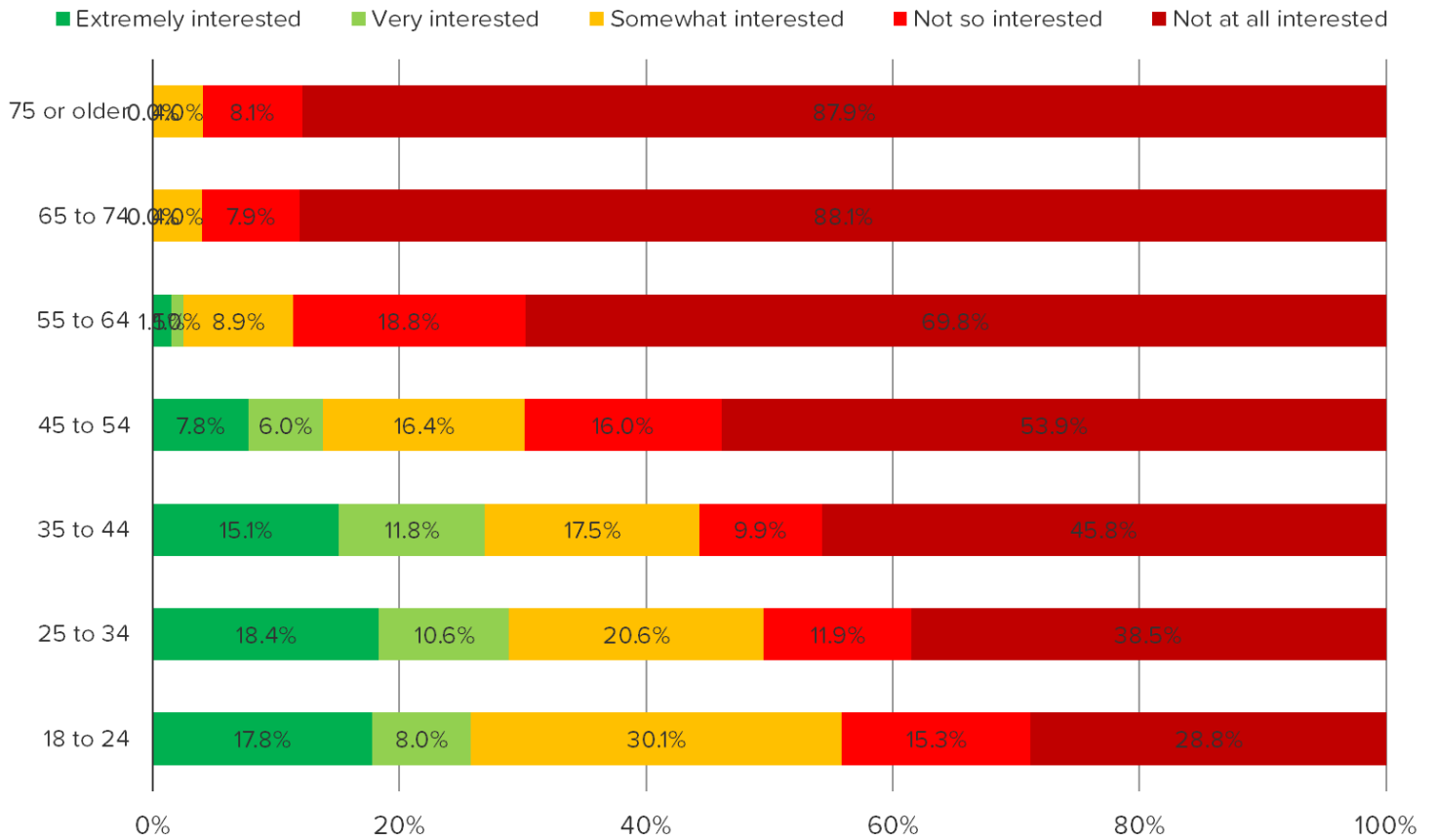
IF TIKTOK LAUNCHED A PAID ONLY STREAMING MUSIC APP, HOW INTERESTED WOULD YOU BE IN SIGNING UP?

Posed to all respondents.



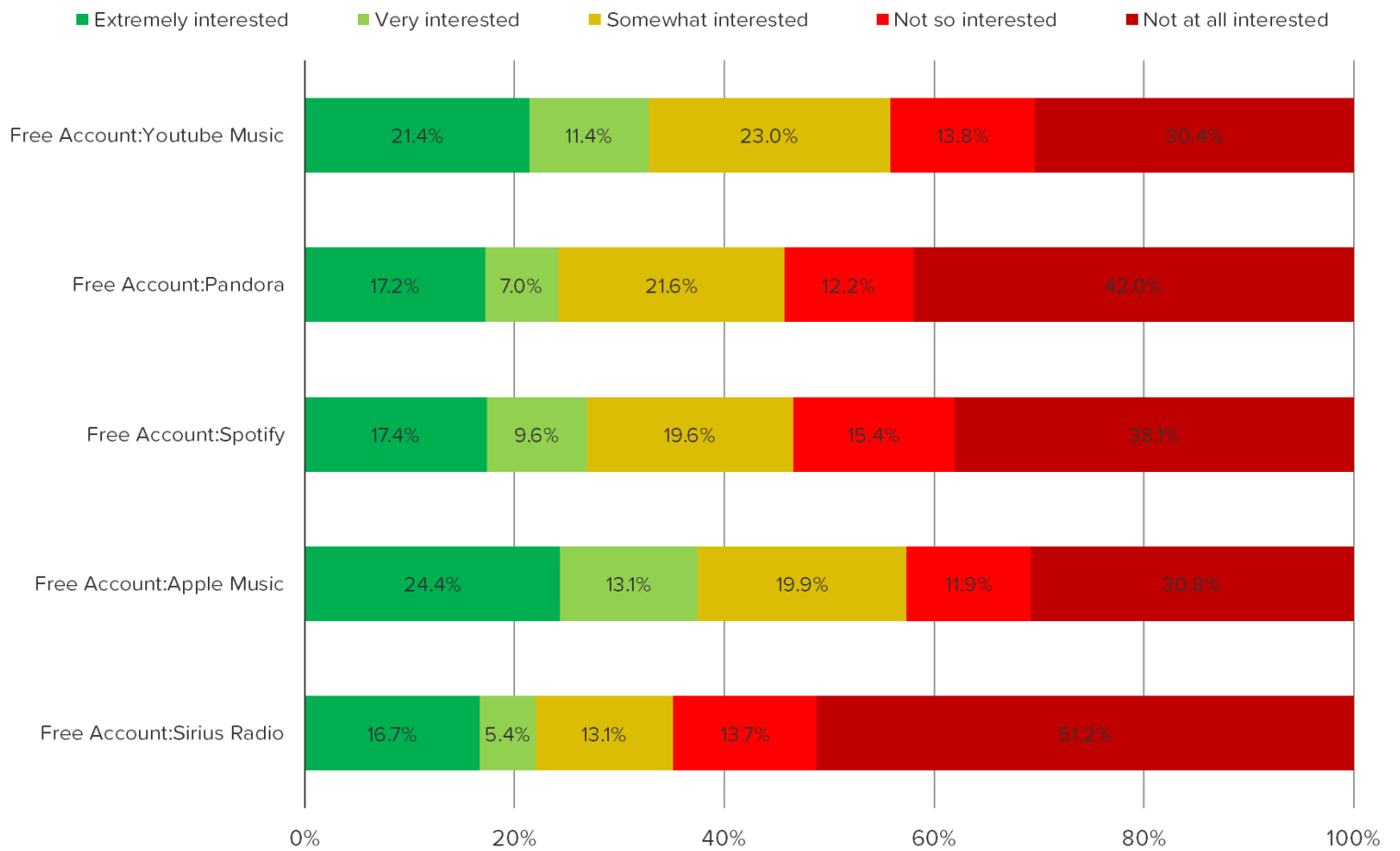
IF TIKTOK LAUNCHED A PAID ONLY STREAMING MUSIC APP, HOW INTERESTED WOULD YOU BE IN SIGHING UP?

Posed to all respondents, cross-tabbed by AGE.



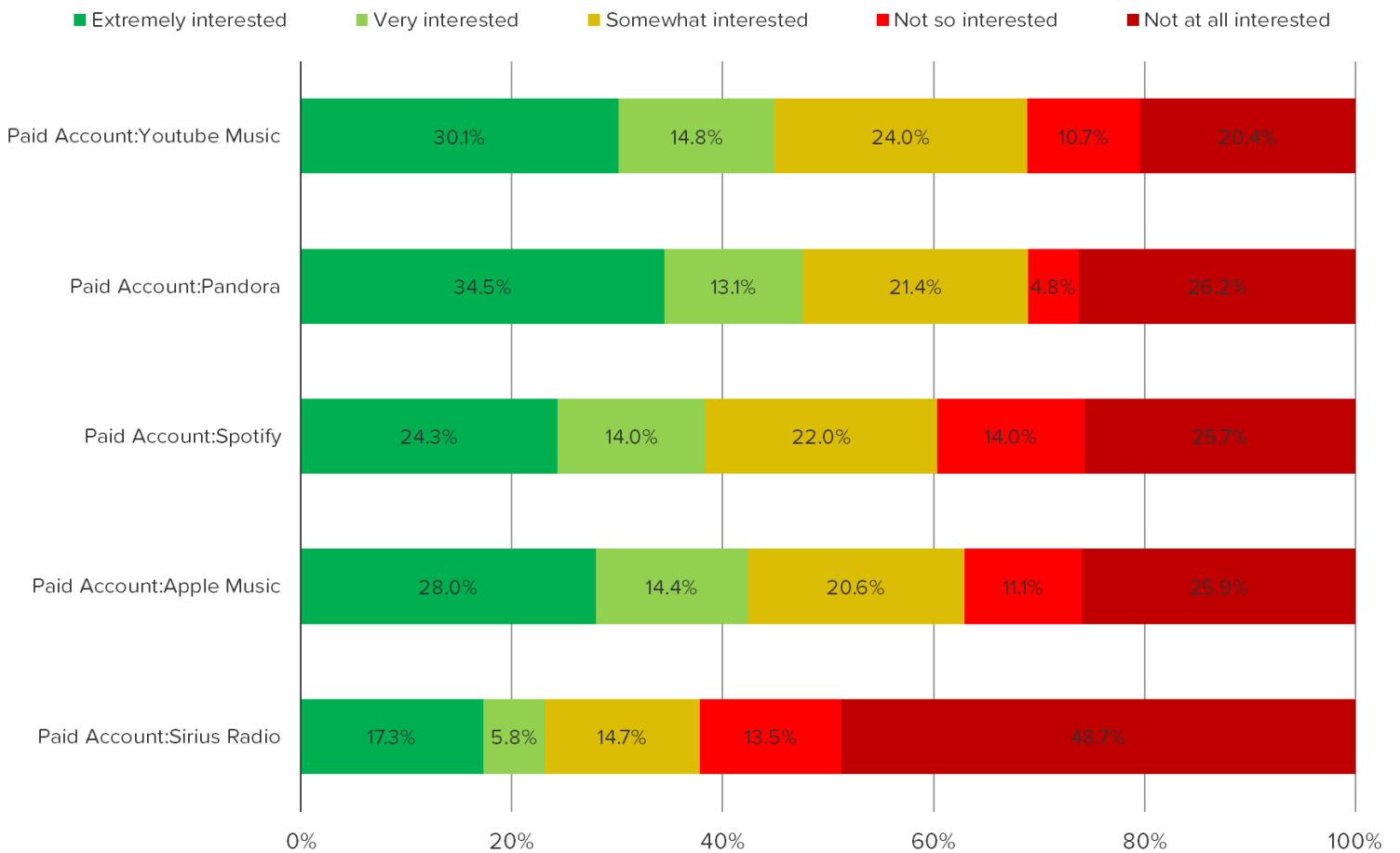
IF TIKTOK LAUNCHED A PAID ONLY STREAMING MUSIC APP, HOW INTERESTED WOULD YOU BE IN SIGNING UP?

Posed to all respondents, cross-tabbed by PLATFORMS RESPONDENTS HAVE A FREE ACCOUNT WITH



IF TIKTOK LAUNCHED A PAID ONLY STREAMING MUSIC APP, HOW INTERESTED WOULD YOU BE IN SIGNING UP?

Posed to all respondents, cross-tabbed by PLATFORMS RESPONDENTS HAVE A PAID ACCOUNT WITH



STREAMING PLATFORM DECISION CATALYSTS AND CRITERIA

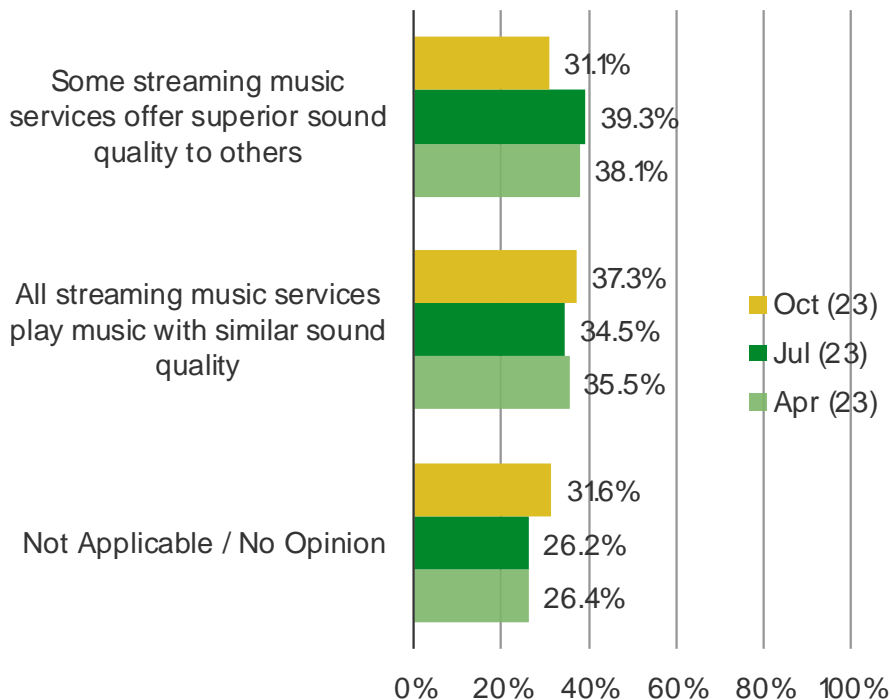
WHAT IS MOST IMPORTANT TO YOU ABOUT THE STREAMING PLATFORMS YOU USE THAT MAKE YOU PICK THEM?

Posed to respondents who have an account with one or more streaming audio platforms.

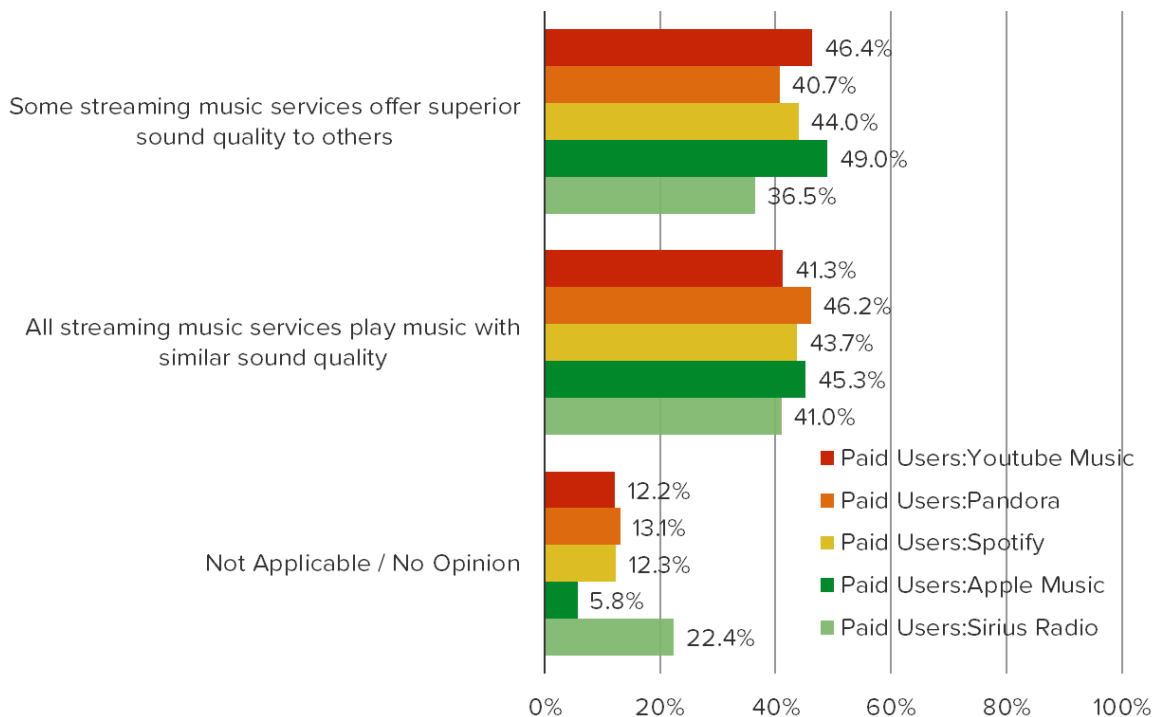


WHICH OF THE FOLLOWING DO YOU AGREE WITH?

Posed to all respondents (N = 1252).



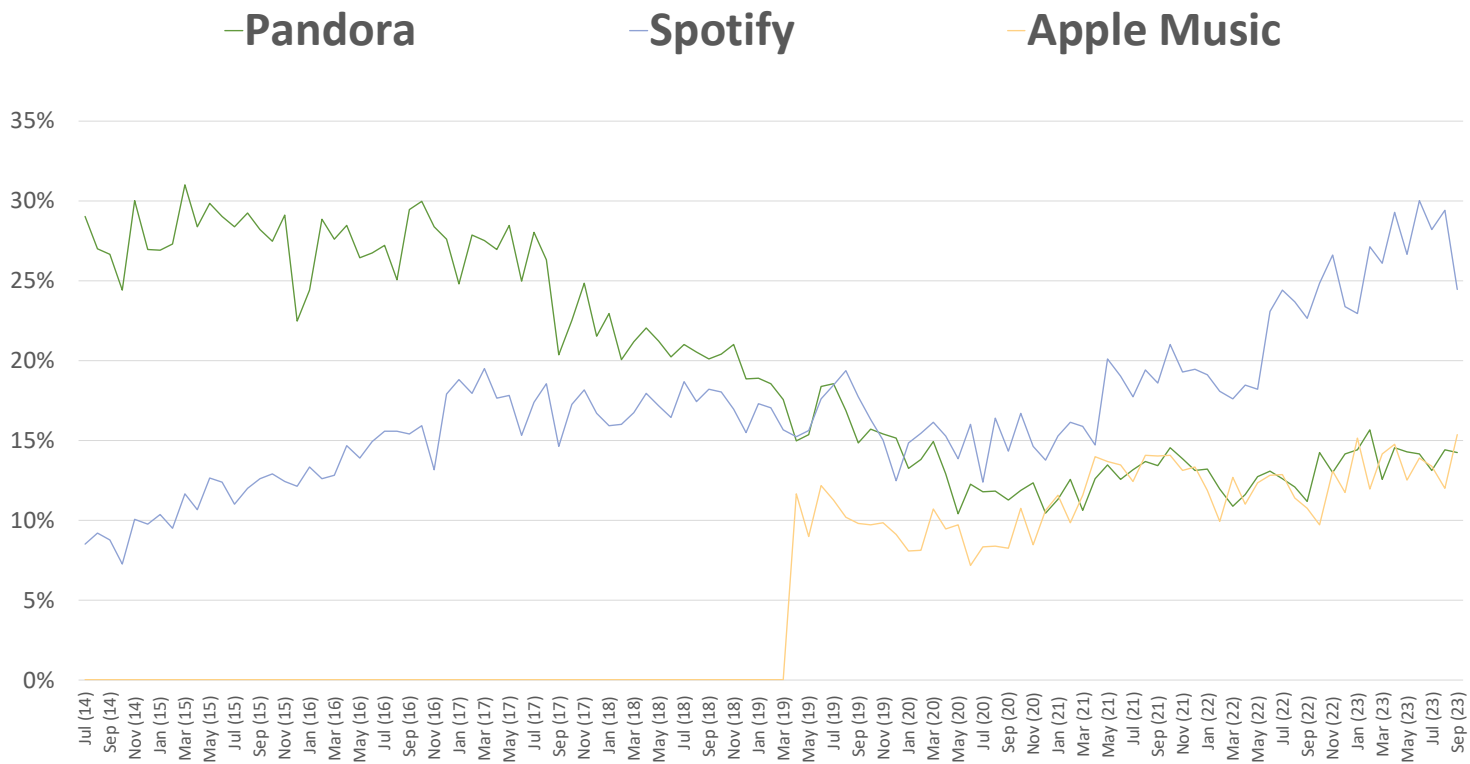
Cross-tab: Paid users of each of the following...



COMPETITIVE DYNAMICS, STREAMING APPS

MONTHLY SURVEY TRACKER (DO YOU CURRENTLY HAVE AN ACCOUNT WITH ANY OF THE FOLLOWING)?

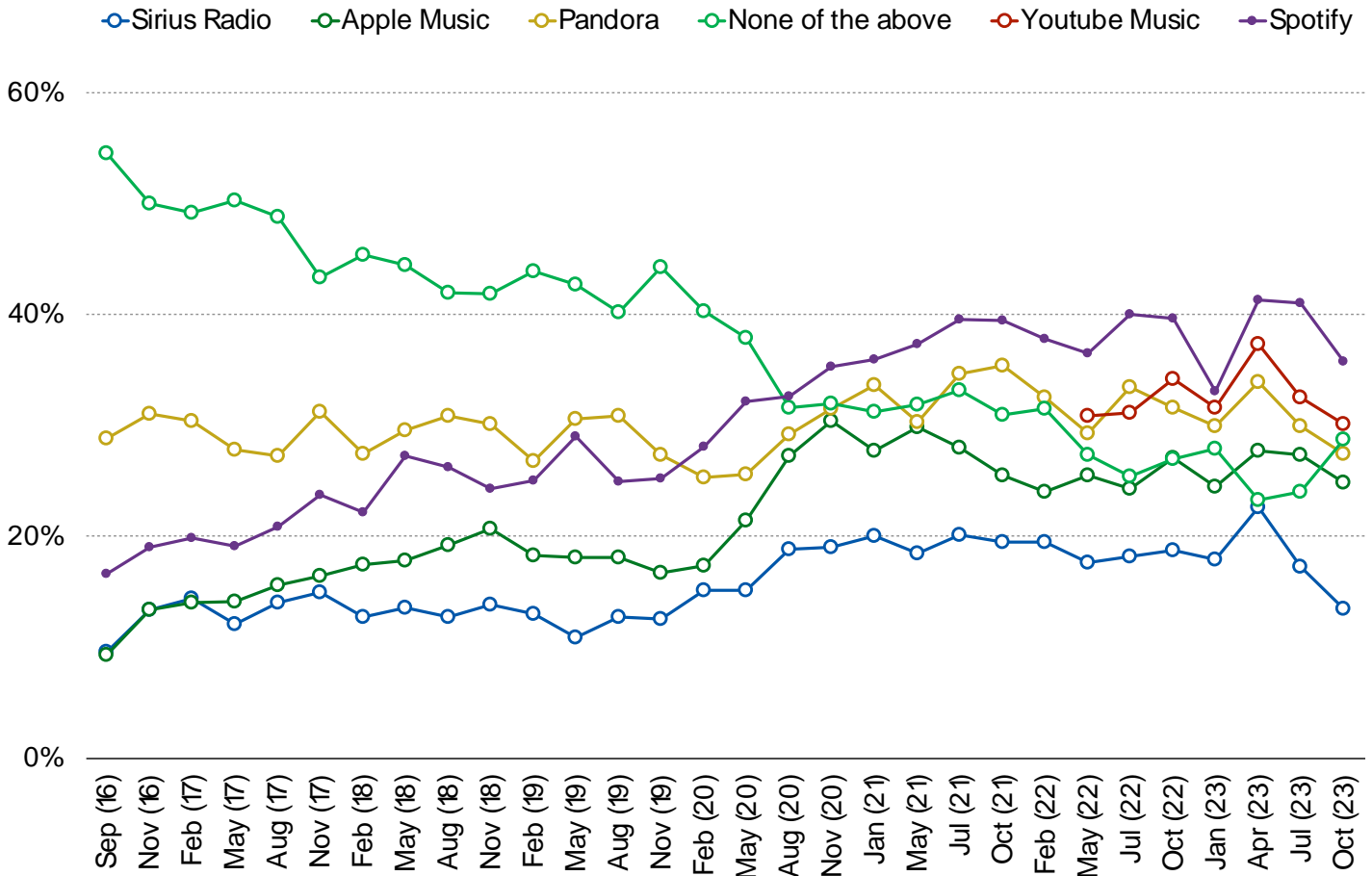
Posed to all respondents.



Radio and Streaming Music

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

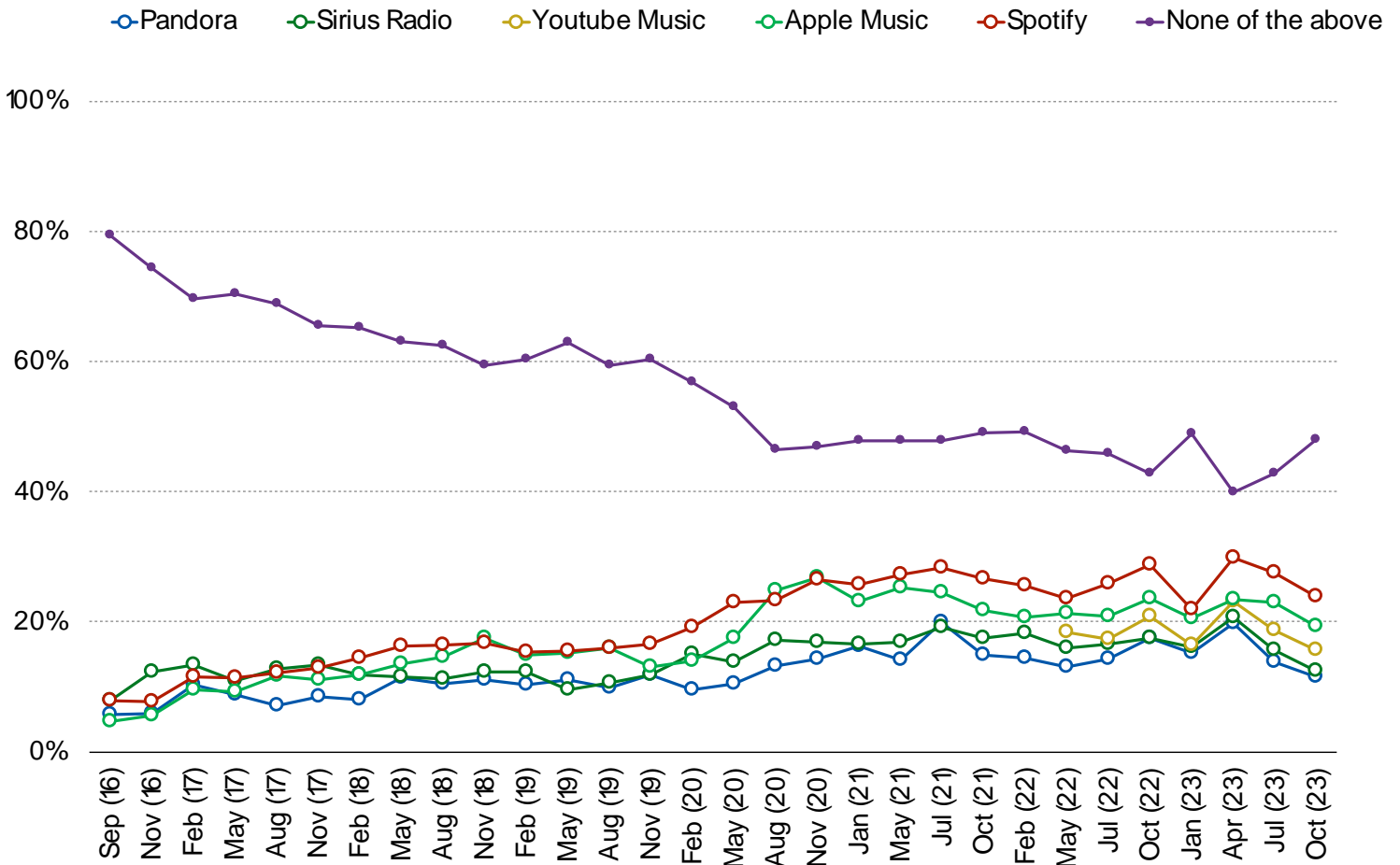
Posed to all respondents.



Radio and Streaming Music

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

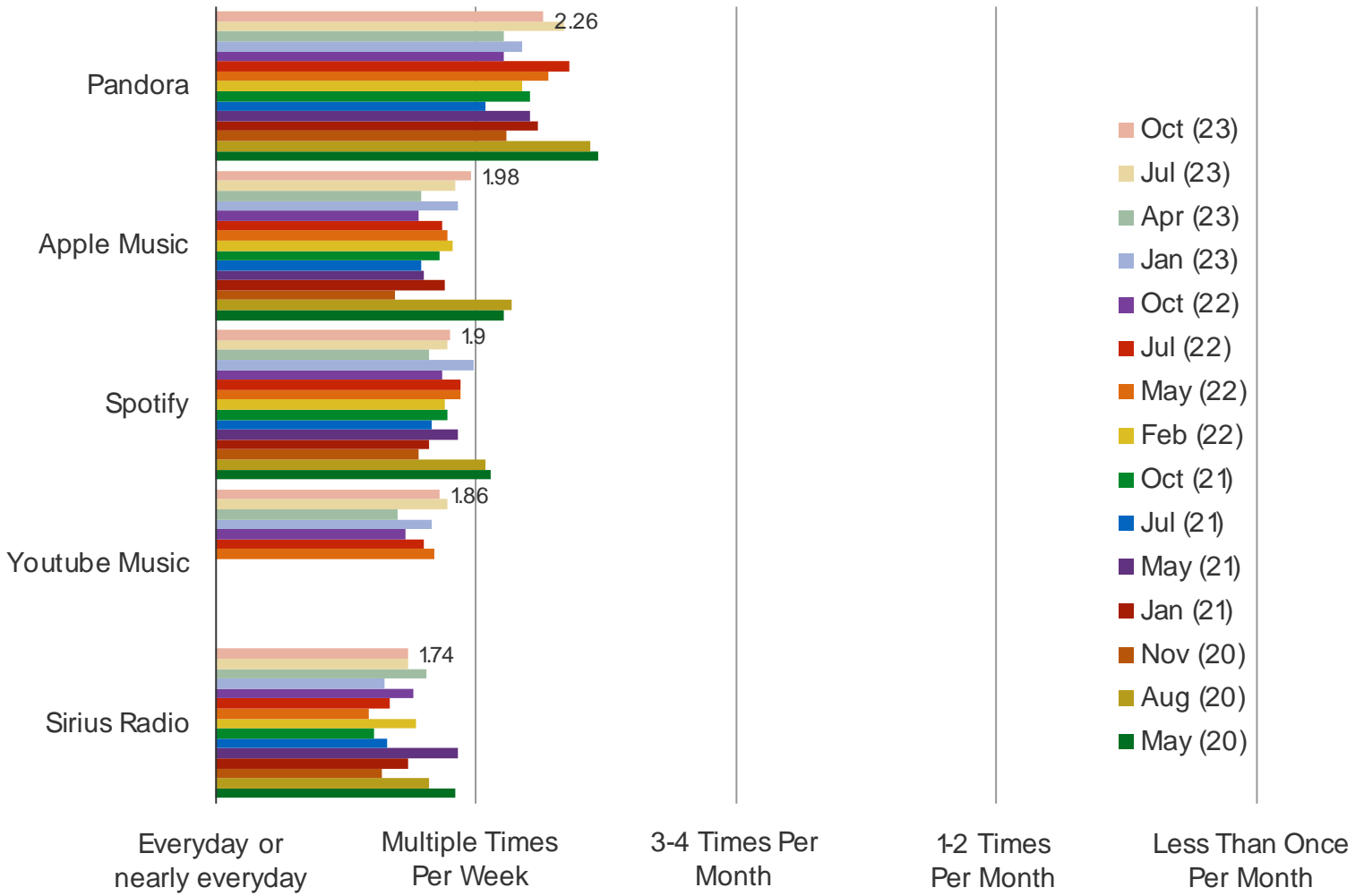
Posed to all respondents.



Radio and Streaming Music

HOW OFTEN DO YOU USE THE FOLLOWING?

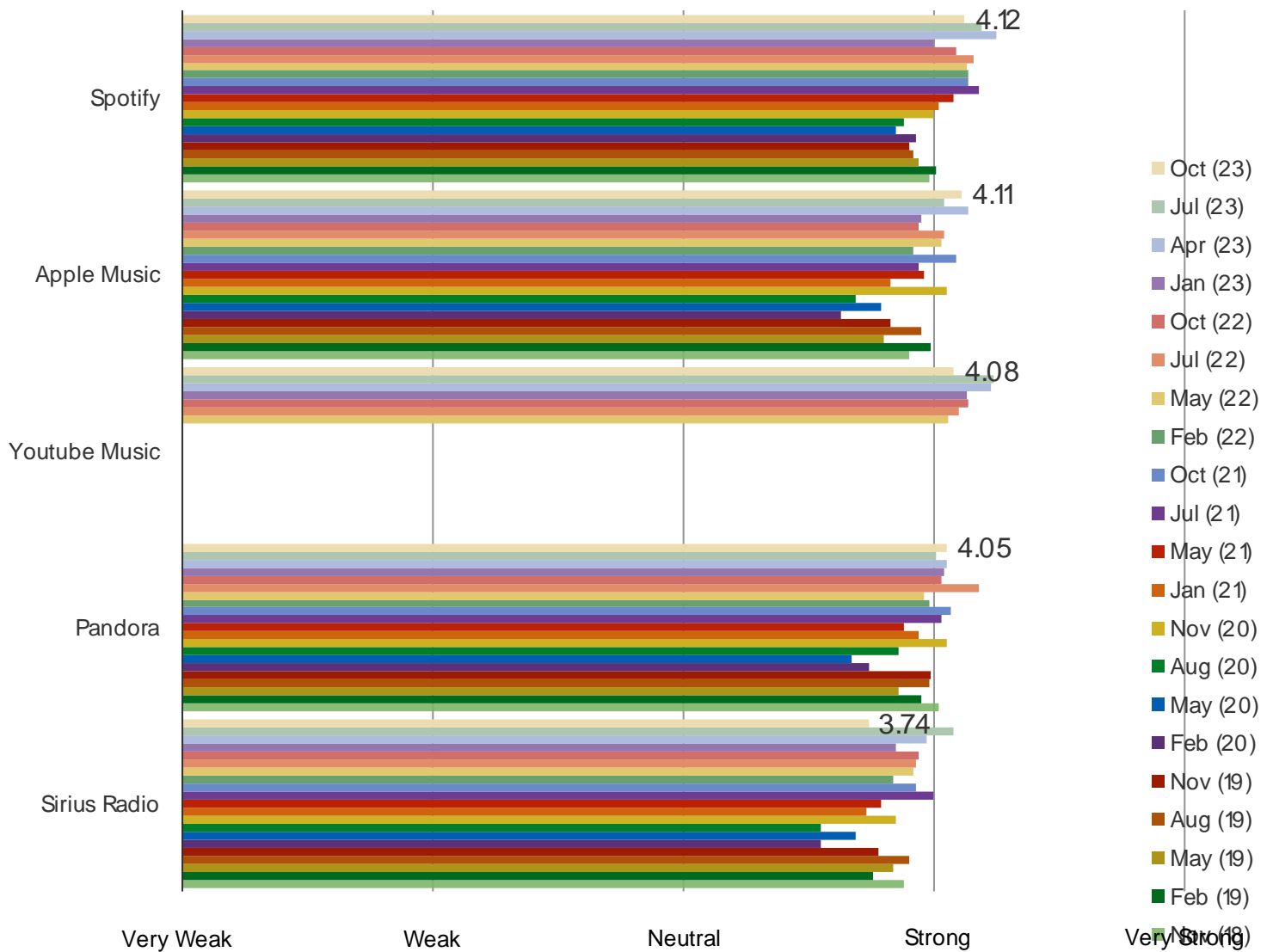
Respondents who have an account with each platform (free or paid)



← More Frequent

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

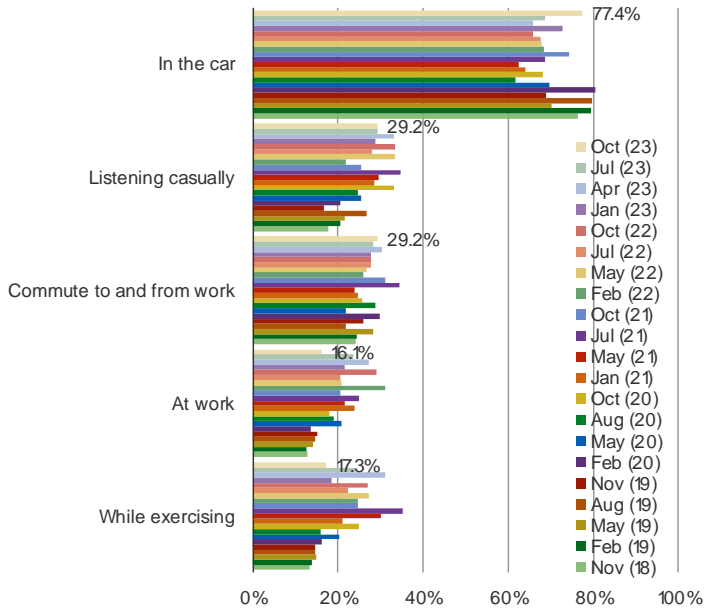
Respondents who pay for each platform



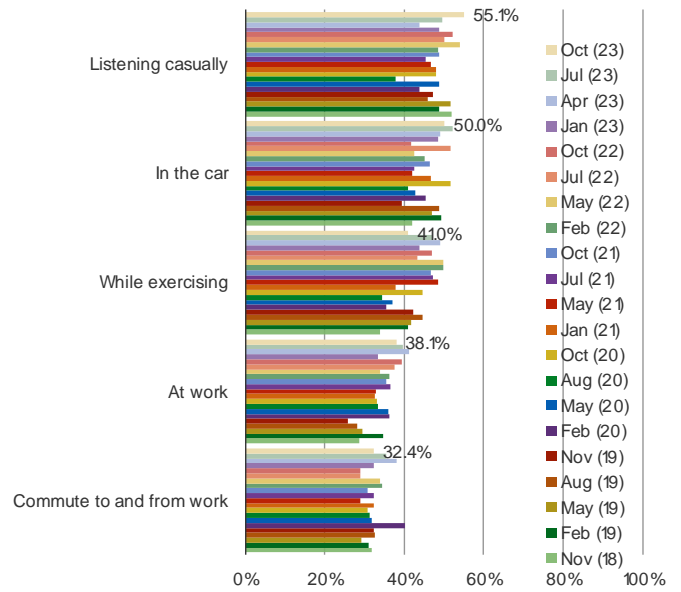
WHERE DO YOU TYPICALLY LISTEN TO THIS PLATFORM? (SELECT ALL THAT APPLY)

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

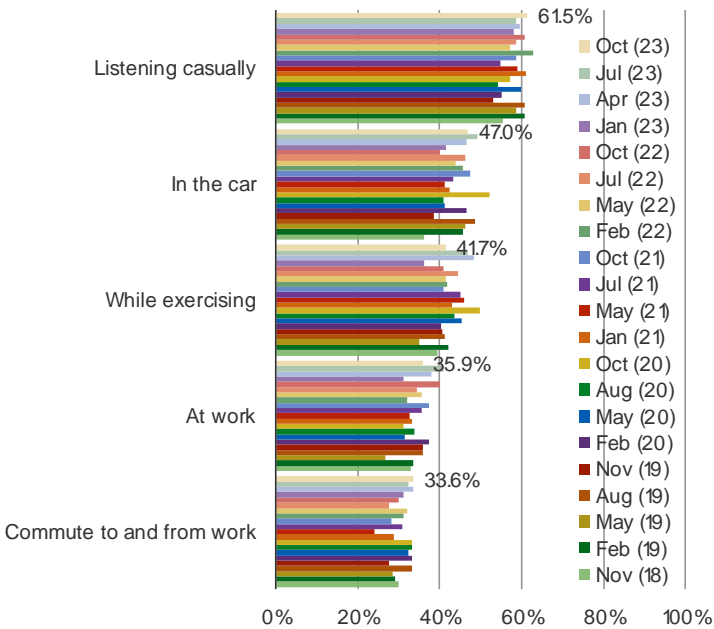
SIRIUS XM



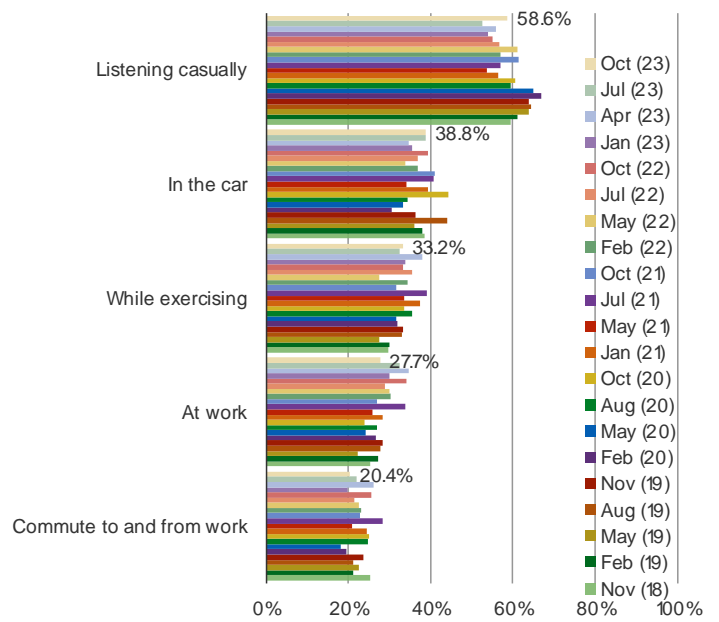
APPLE MUSIC



SPOTIFY

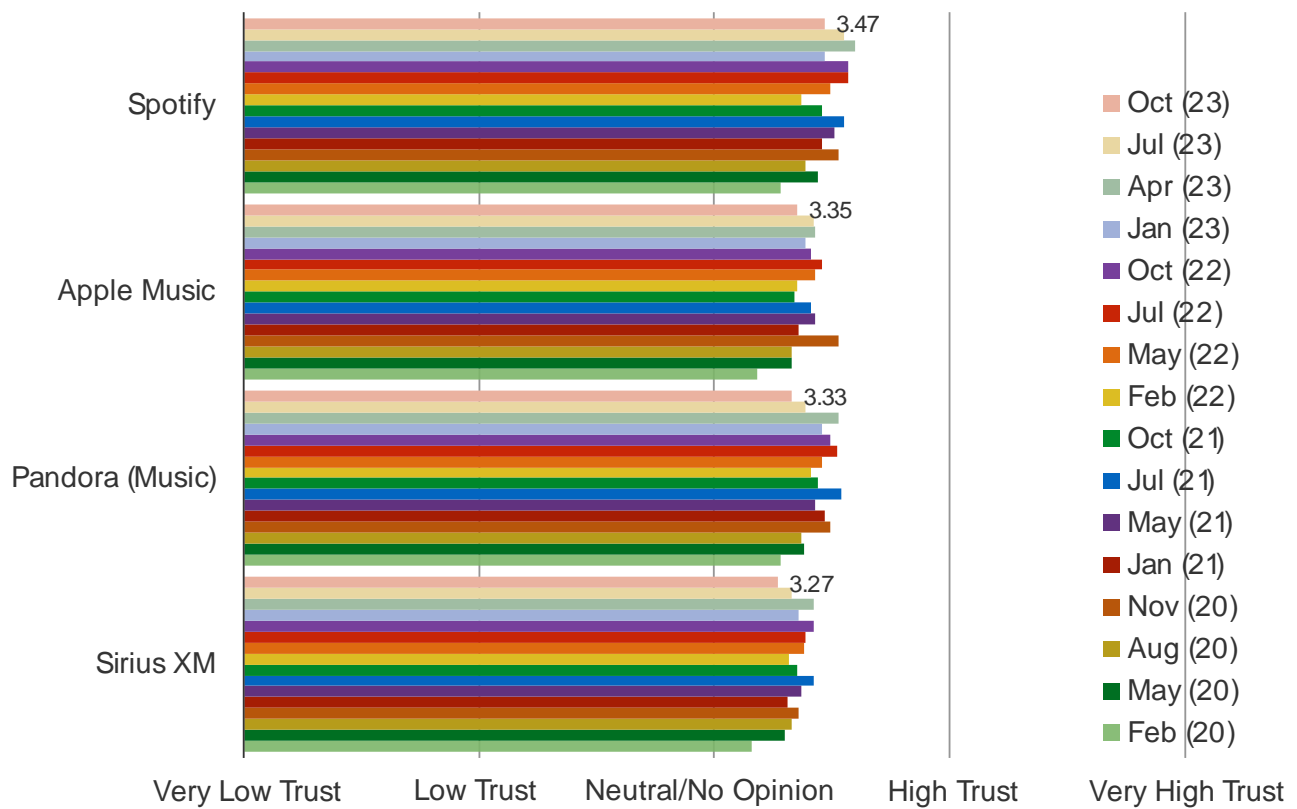


PANDORA



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

Posed to all respondents

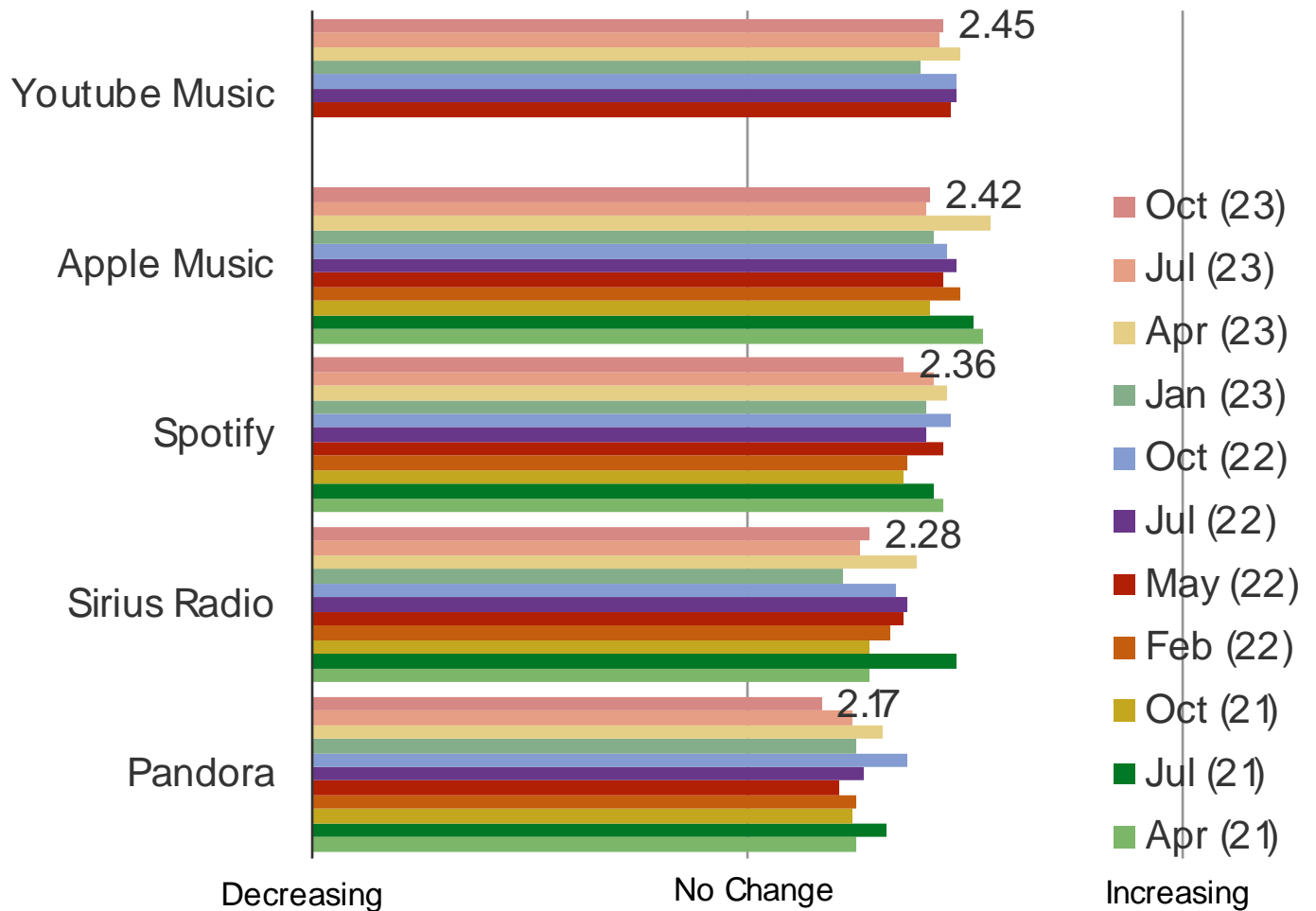


Radio and Streaming Music

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)

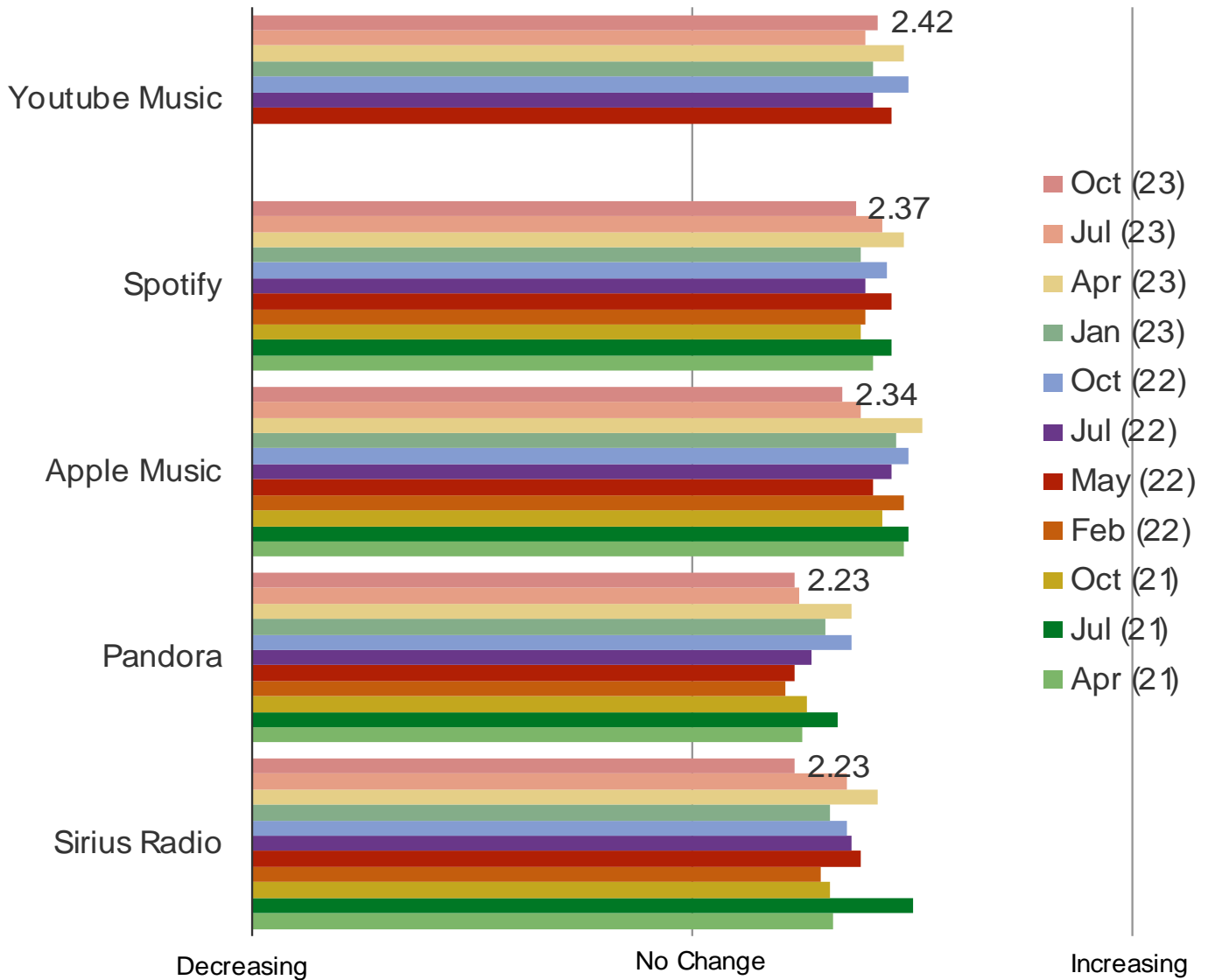


Radio and Streaming Music

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.

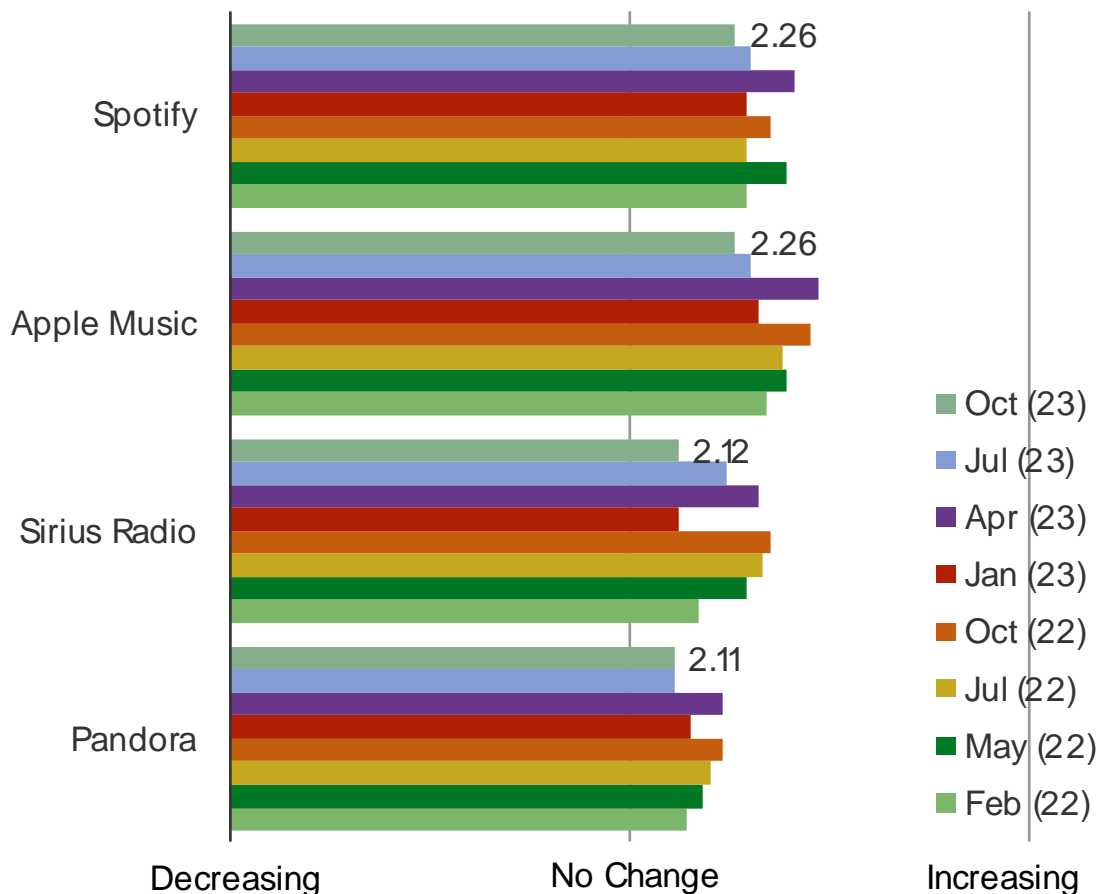
Catalog Music (Released 6+ Months Ago)



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

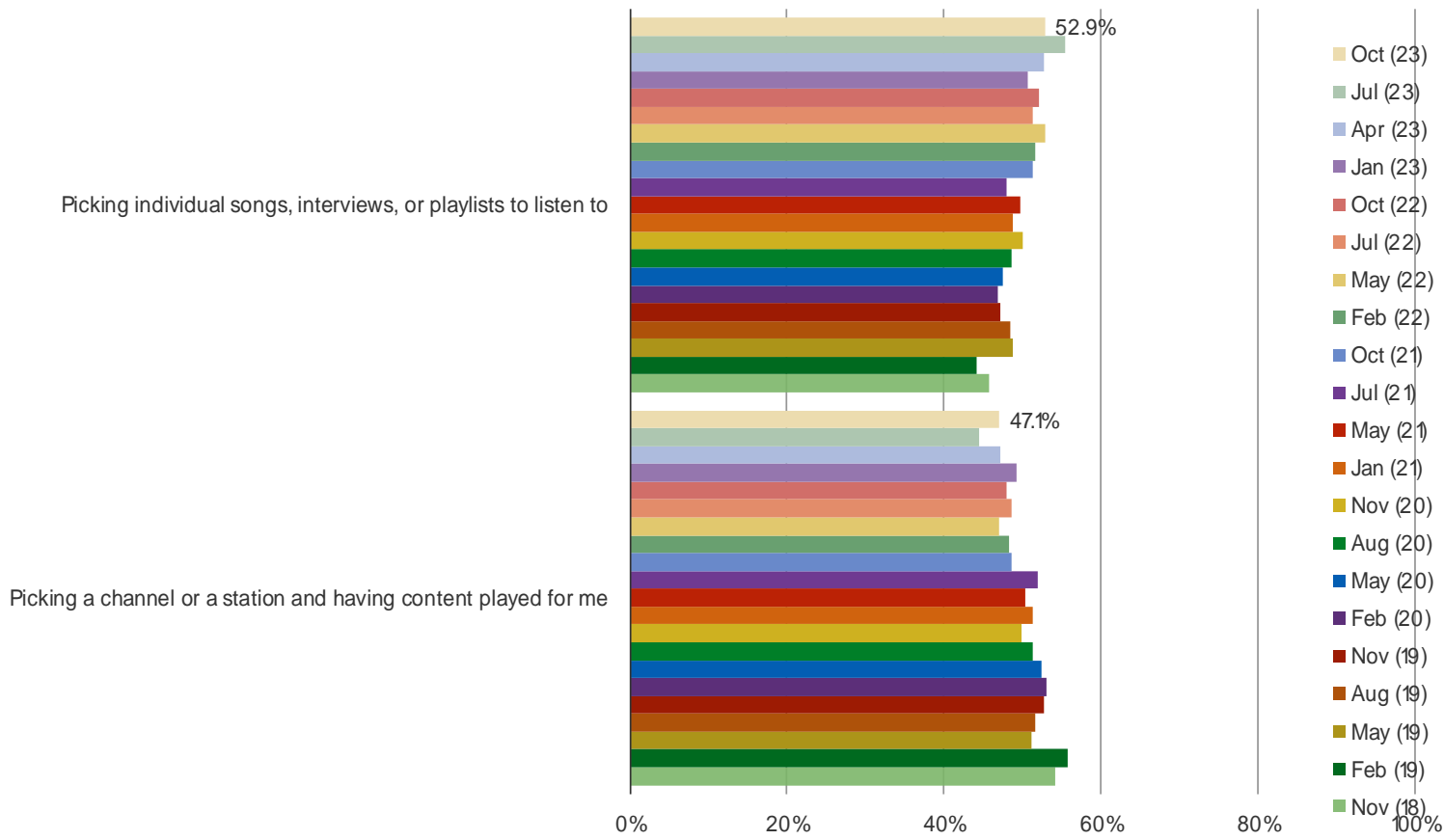
Posed to users of each platform.

Podcasts



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

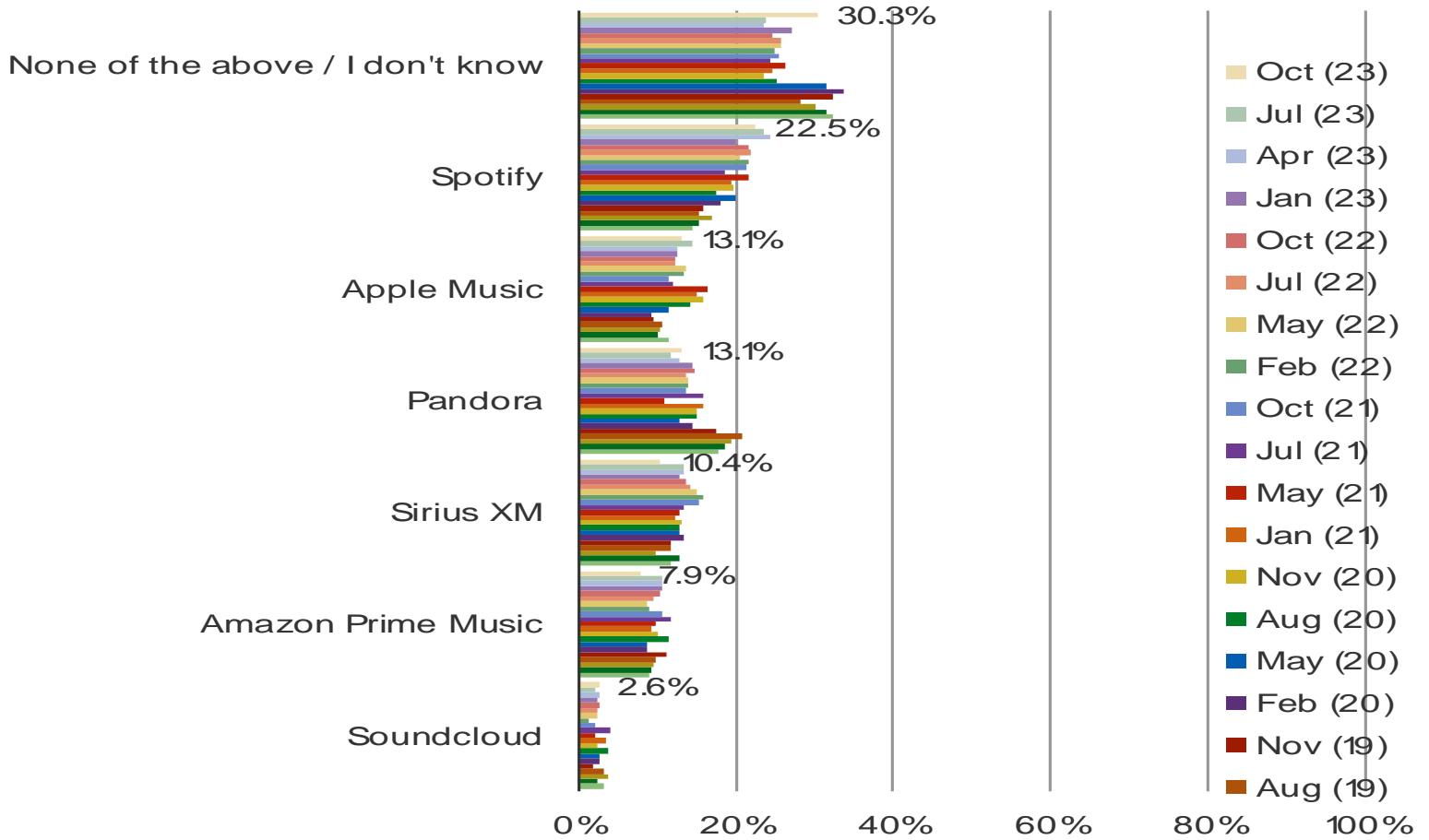
Posed to all respondents.



Radio and Streaming Music

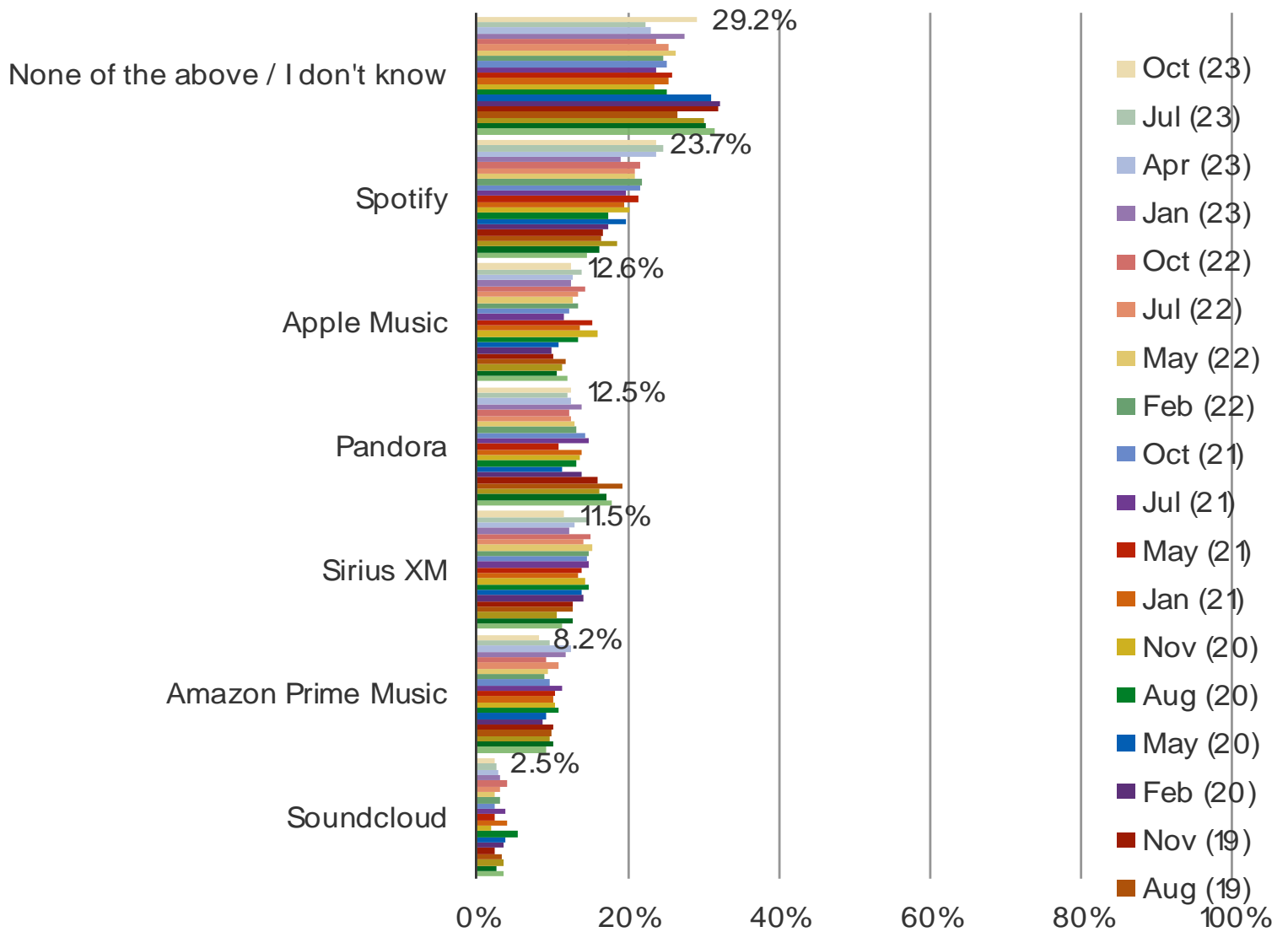
IN YOUR OPINION, WHICH PLATFORM IS BEST WHEN IT COMES TO THE WAY IN WHICH THEY DELIVER CONTENT TO ITS USERS? (IE. THE BEST USER EXPERIENCE)

Posed to all respondents.



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

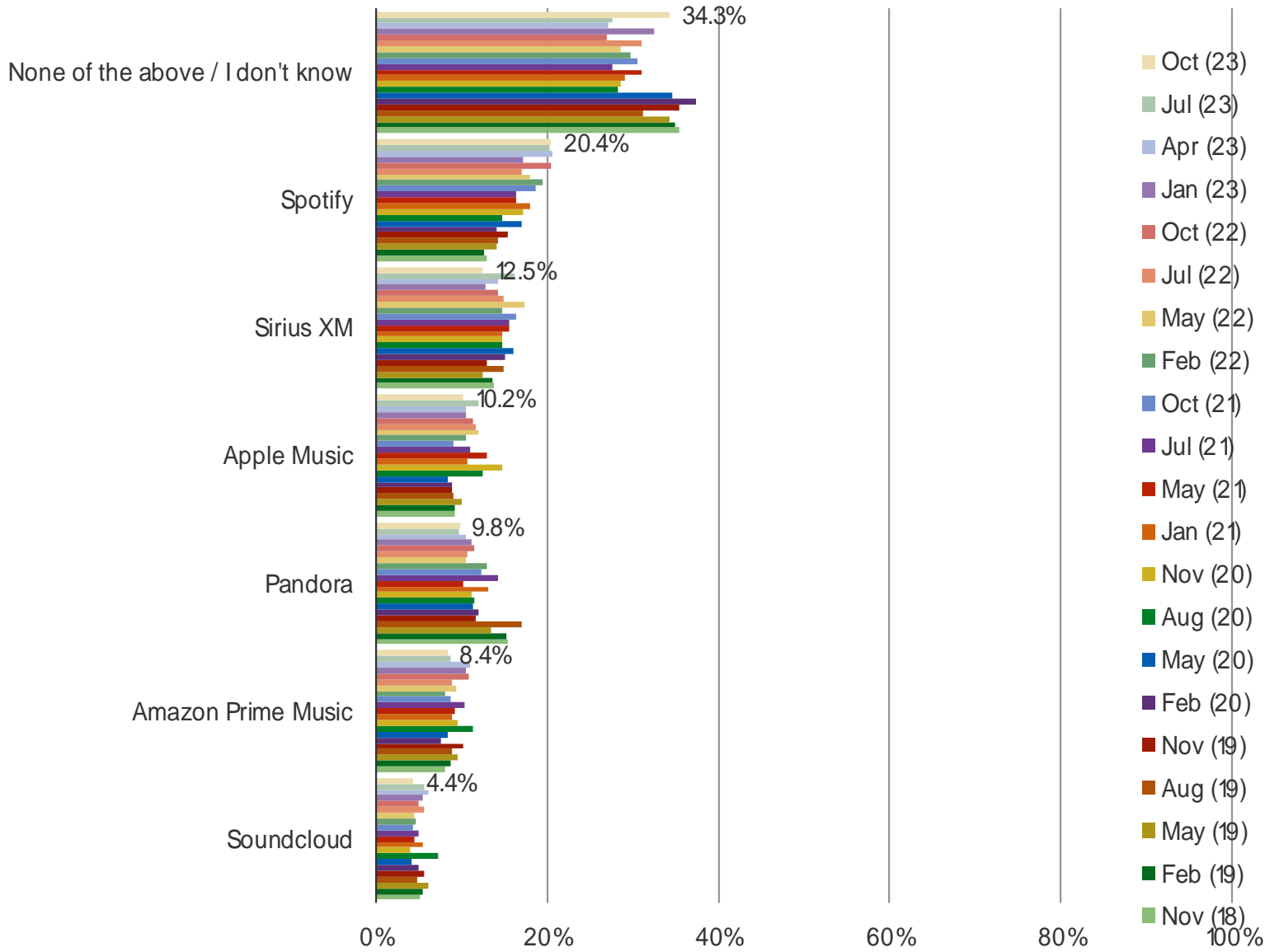
Posed to all respondents.



Radio and Streaming Music

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

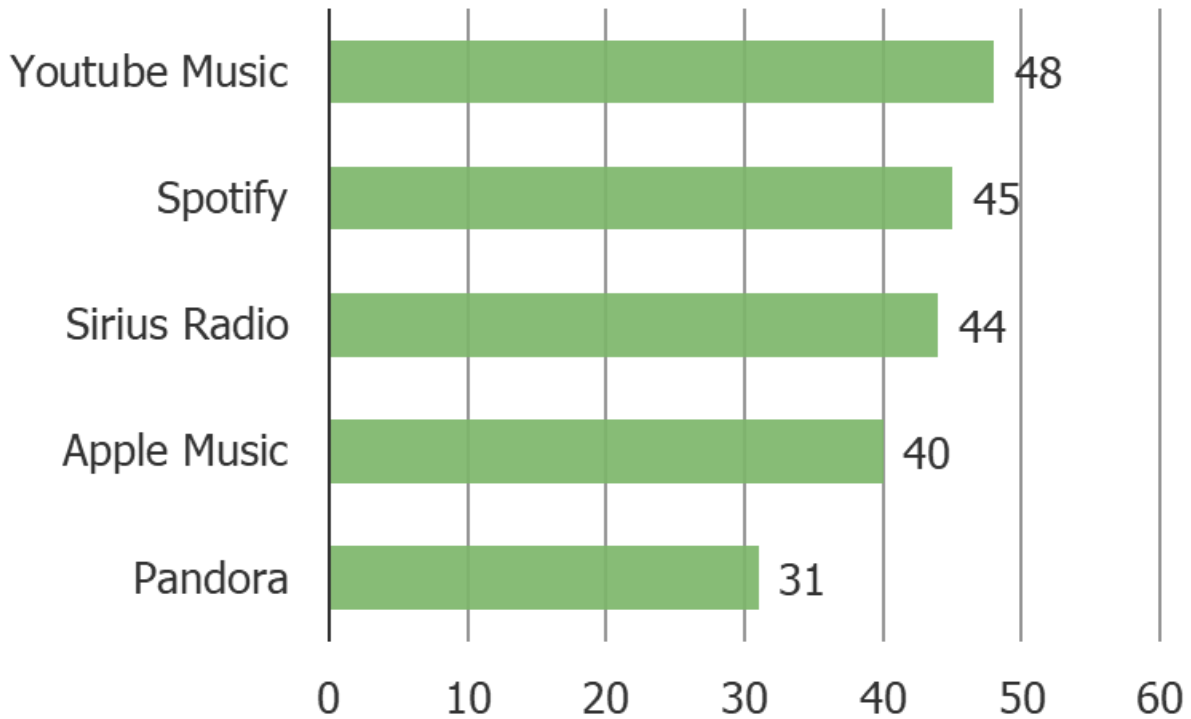
Posed to all respondents.



Radio and Streaming Music

HOW LIKELY IS IT THAT YOU WOULD RECOMMEND THIS PLATFORM TO A FRIEND OR COLLEAGUE?

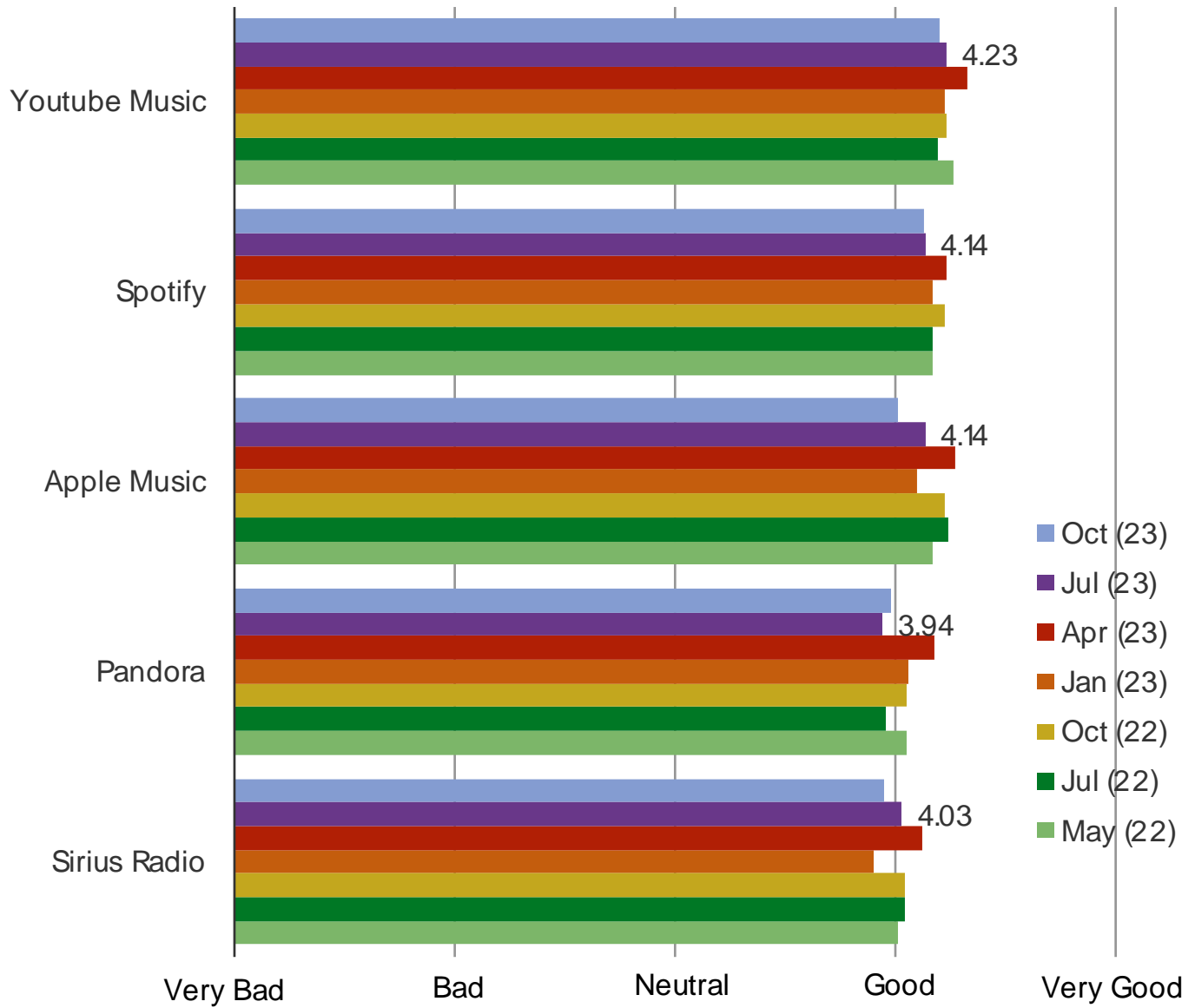
Posed to respondents who have an account with each of the following (combining all responses from 2023 to achieve larger N sizes).



	N =
Spotify	1893
Youtube Music	1646
Pandora	1516
Apple Music	1307
Sirius Radio	890

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

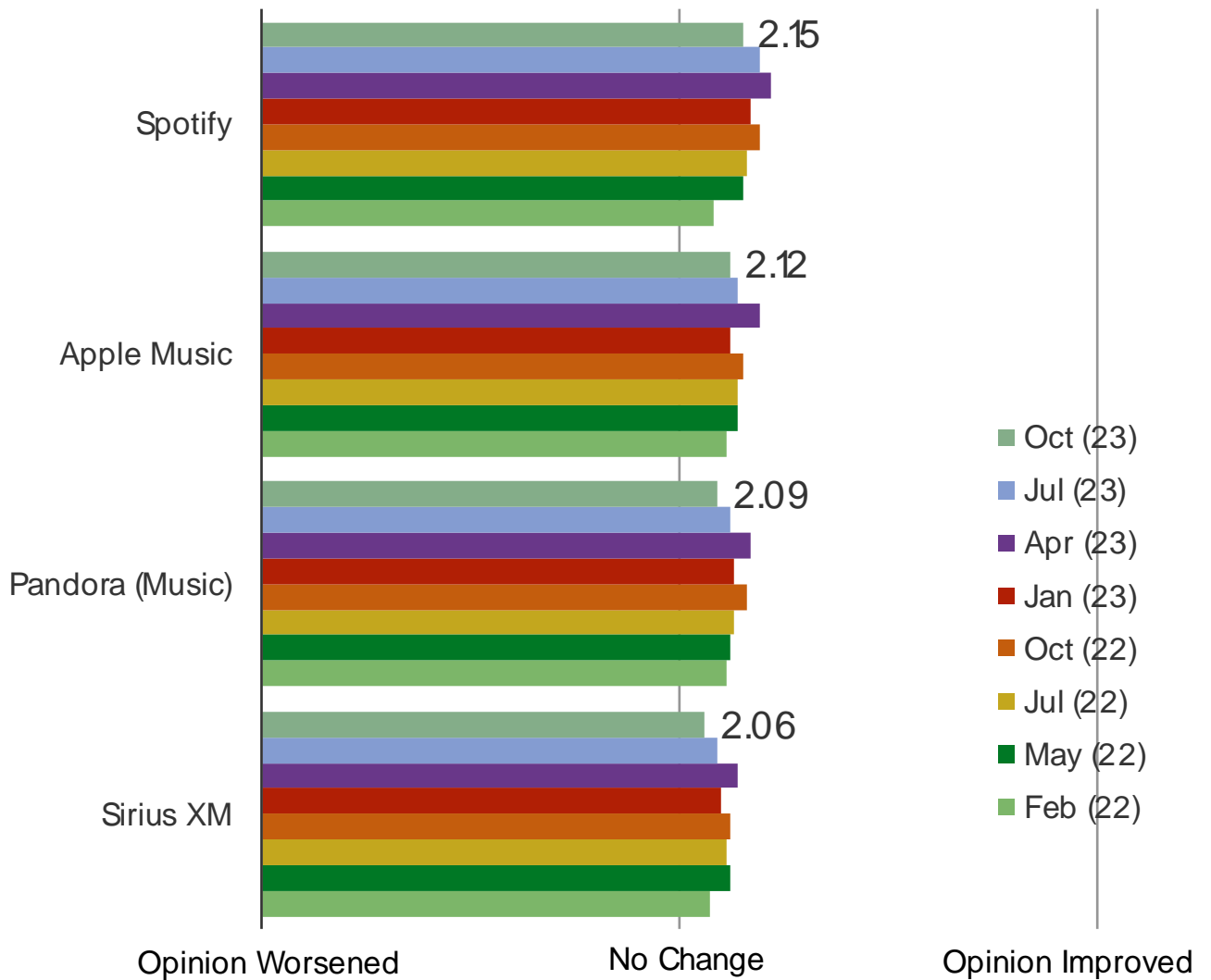
Posed to users of each of the following.



	N=
Sirius Radio	168
Apple Music	312
Spotify	449
Pandora	343
Youtube Music	378

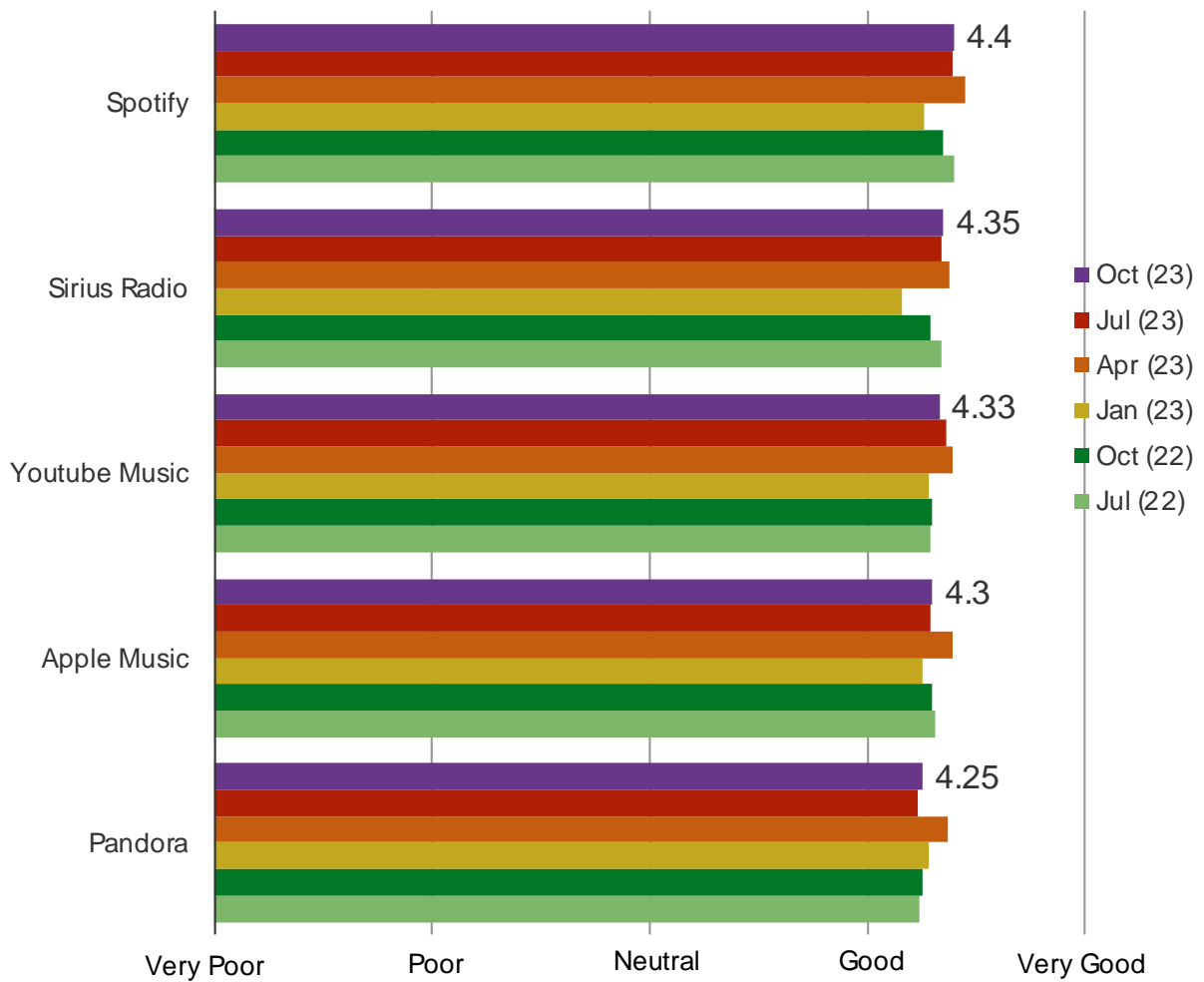
HAS YOUR OPINION OF ANY OF THE FOLLOWING CHANGED RECENTLY?

Posed to all respondents.



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

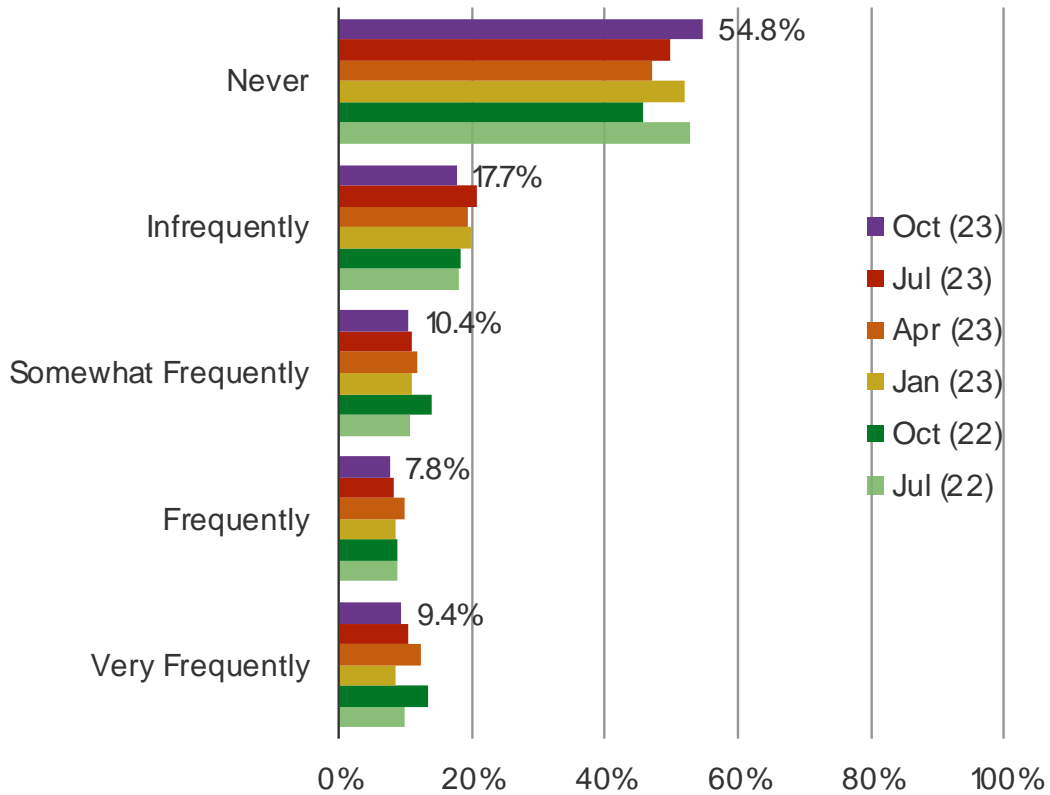
Posed to users of each of the following.



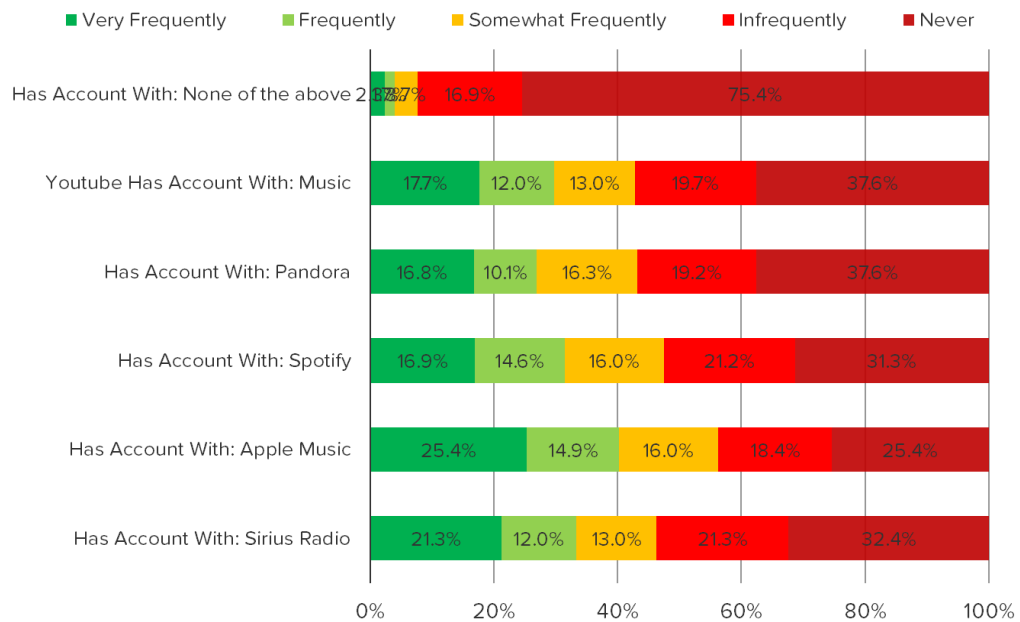
	N=
Sirius Radio	168
Apple Music	312
Spotify	449
Pandora	343
Youtube Music	378

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



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



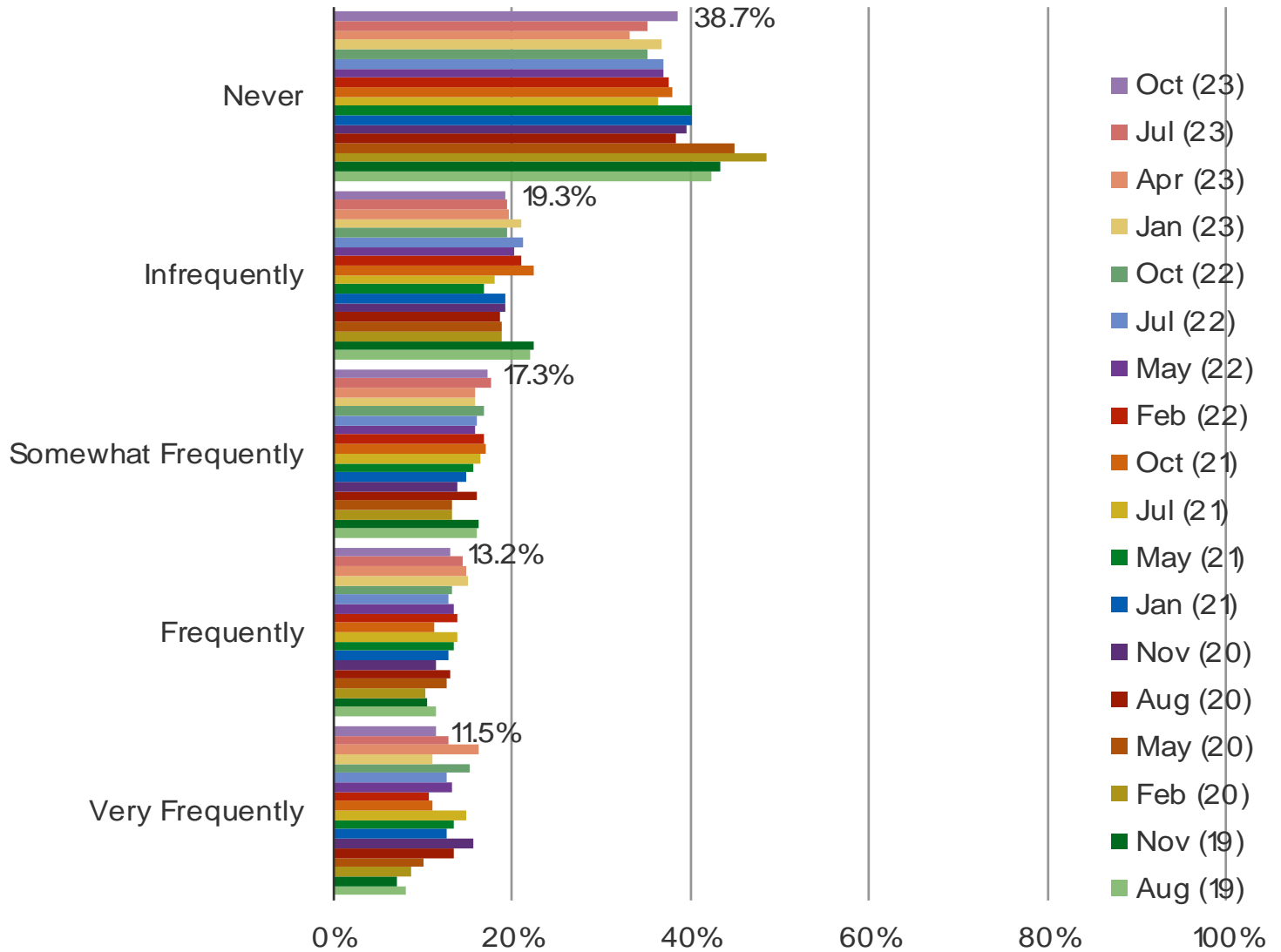
Sirius XM



PODCASTS

HOW OFTEN DO YOU LISTEN TO PODCASTS?

Posed to all respondents.



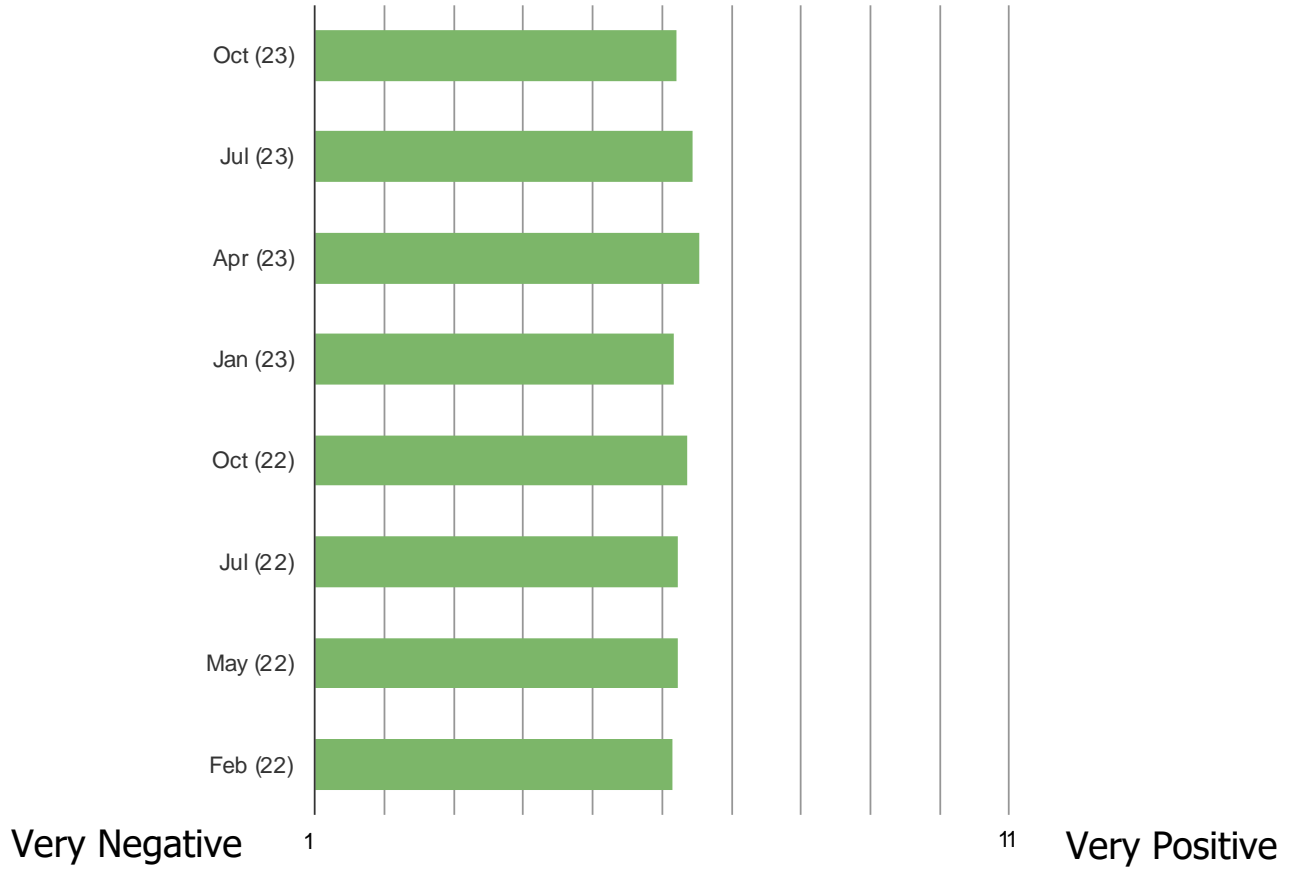
WHAT ARE YOUR FAVORITE PODCASTS TO LISTEN TO AT THE MOMENT?

Posed to all respondents.



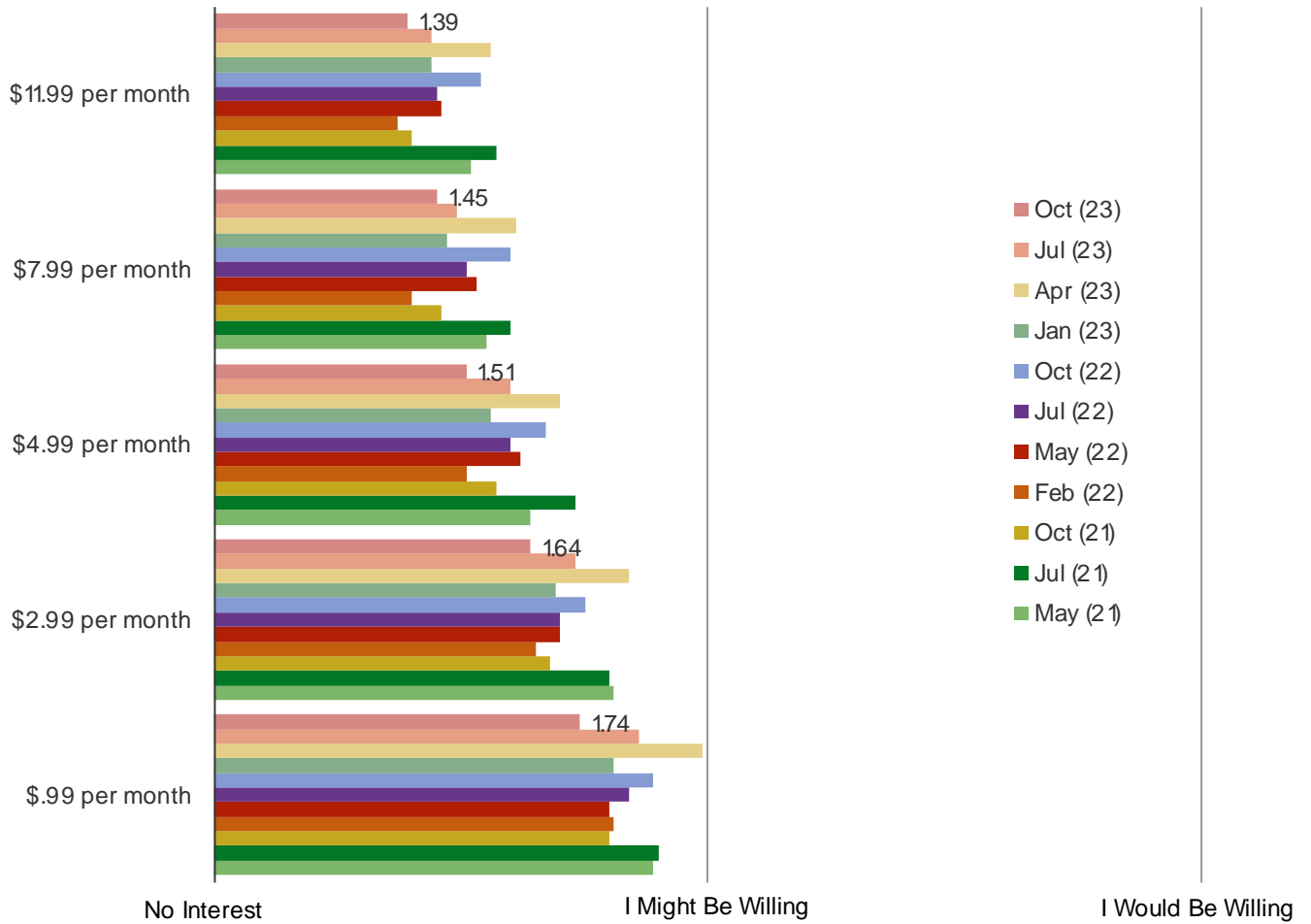
WHAT IS YOUR OPINION OF JOE ROGAN?

Posed to all respondents.



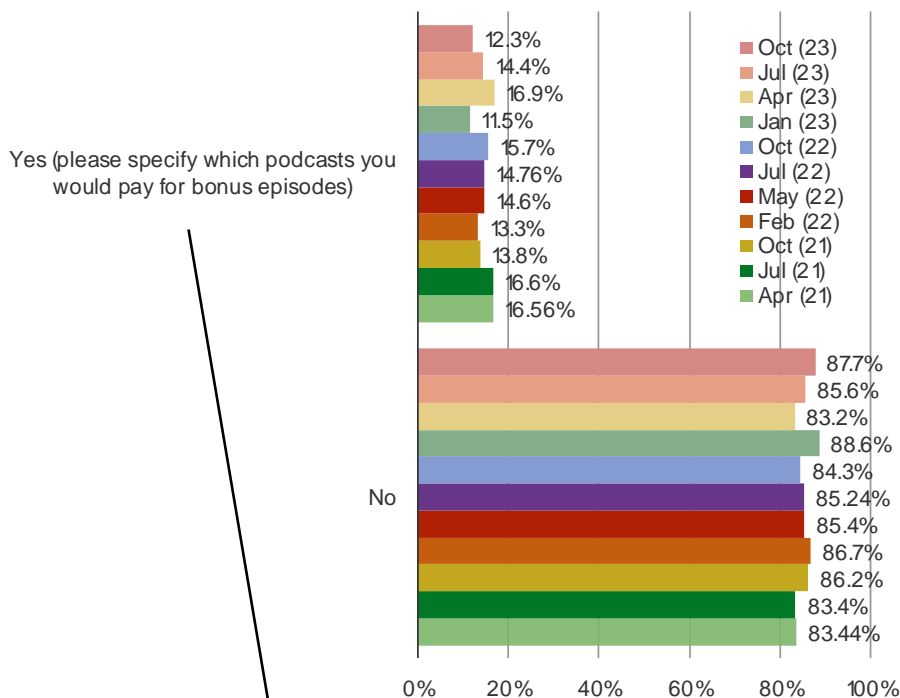
HOW INTERESTED WOULD YOU BE IN PAYING FOR SUBSCRIBER ONLY BONUS EPISODES TO ANY OF THE PODCASTS YOU LISTEN TO OR MIGHT DISCOVER IN THE FUTURE?

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.



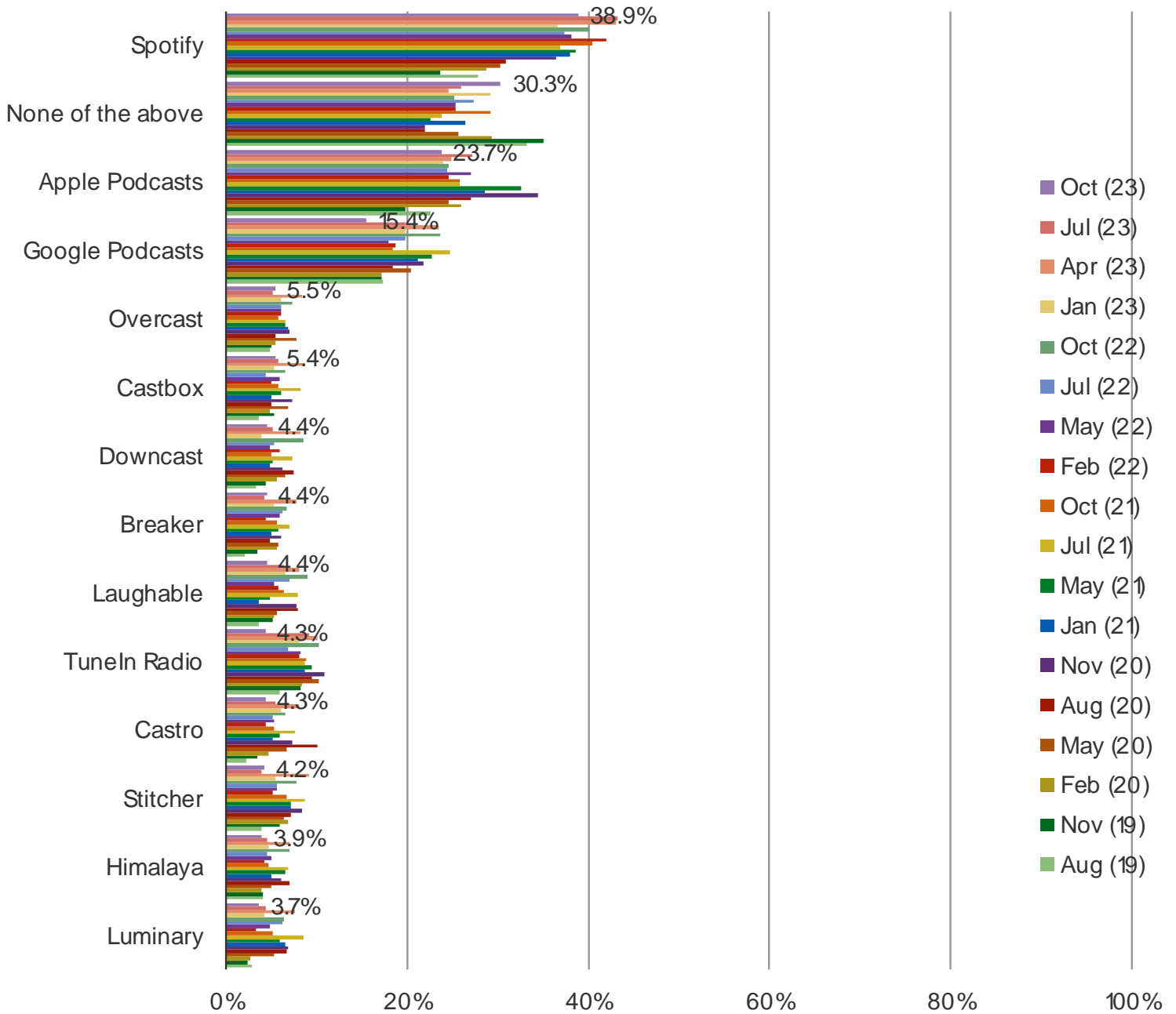
Yes (please specify which podcasts you would pay for bonus episodes)

No



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

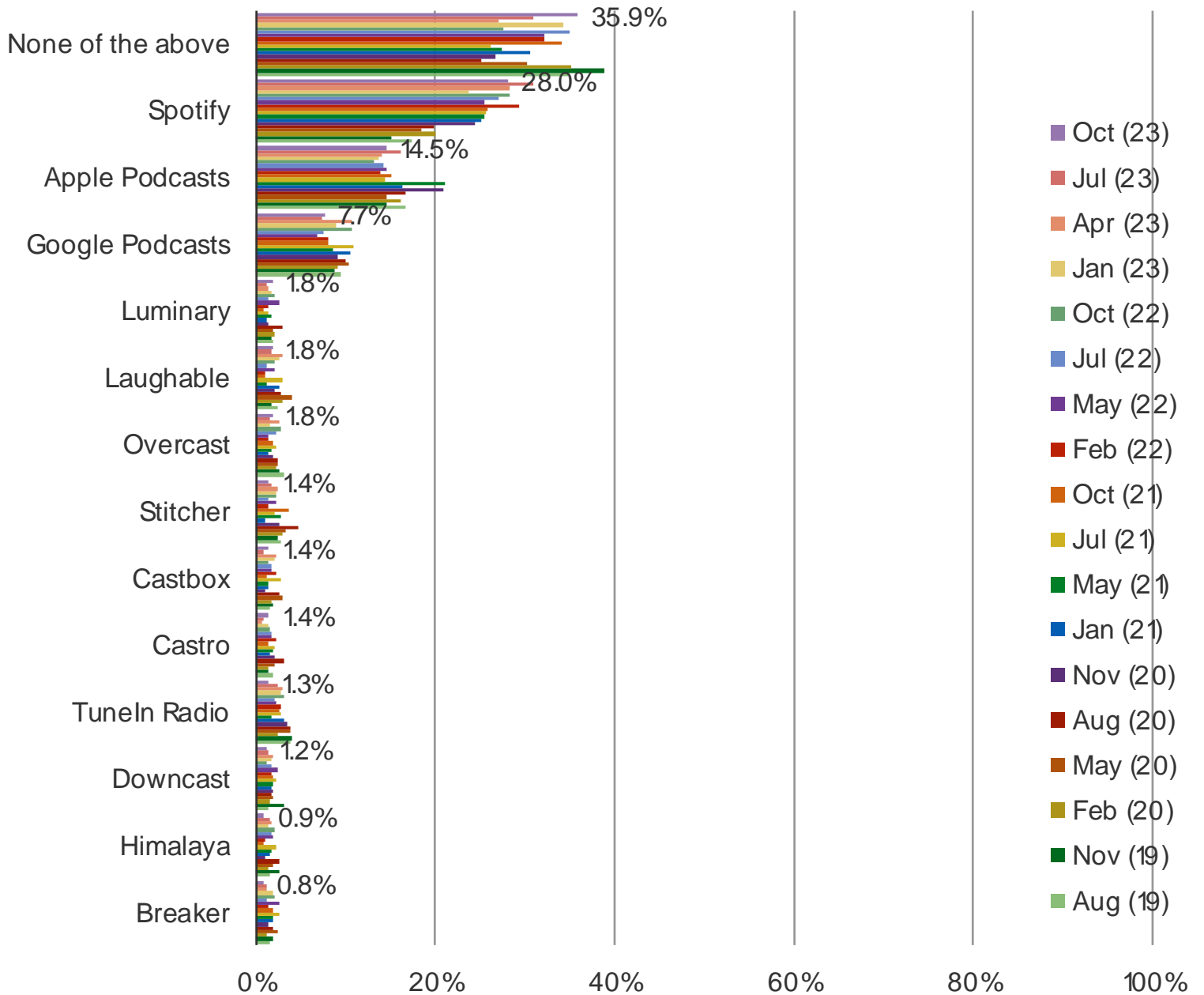
Posed to respondents who listen to podcasts (more often than never)



Radio and Streaming Music

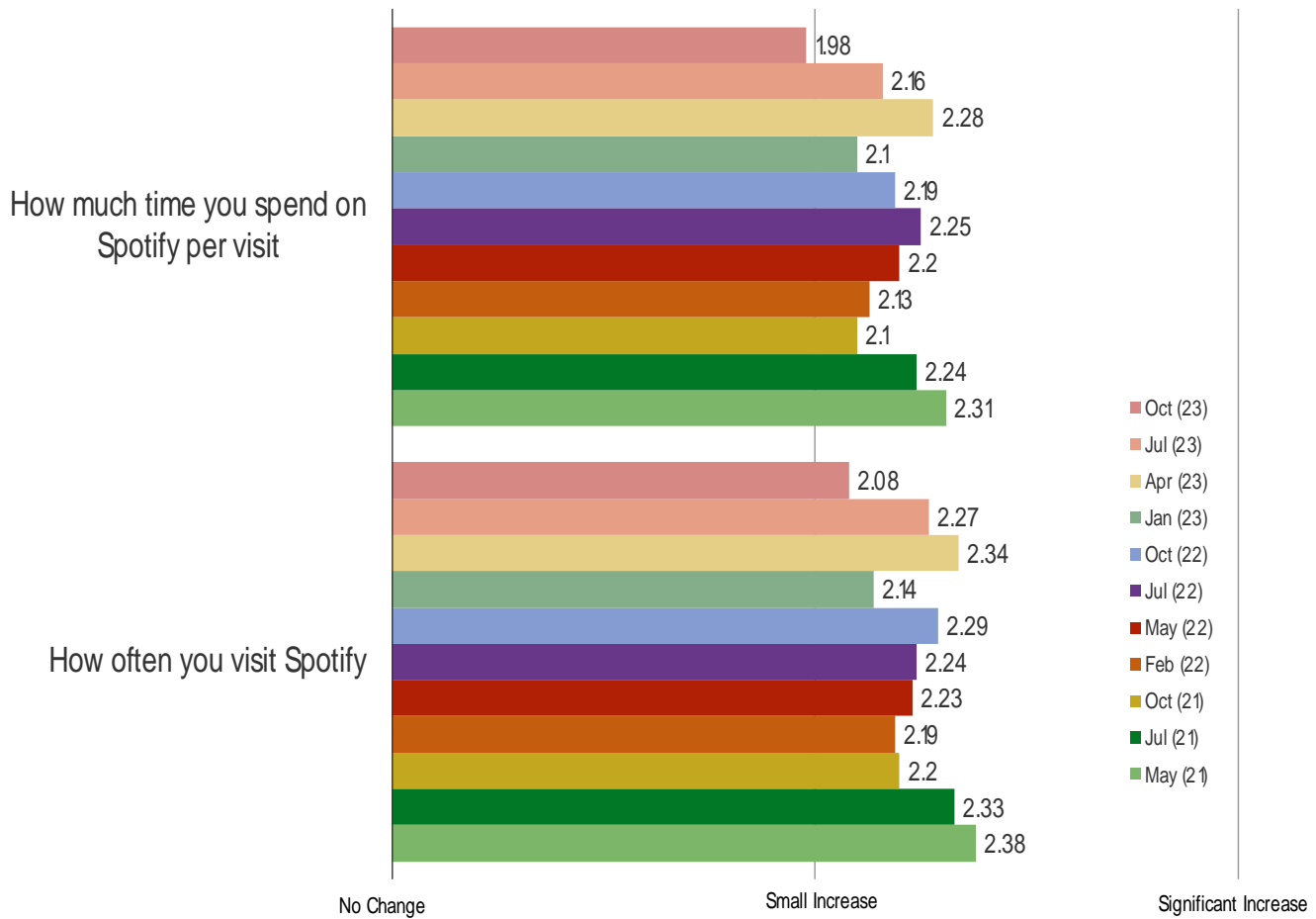
WHICH OF THE FOLLOWING HAS THE MOST UNIQUE PODCAST CONTENT THAT YOU CANNOT FIND ON OTHER PLATFORMS?

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...

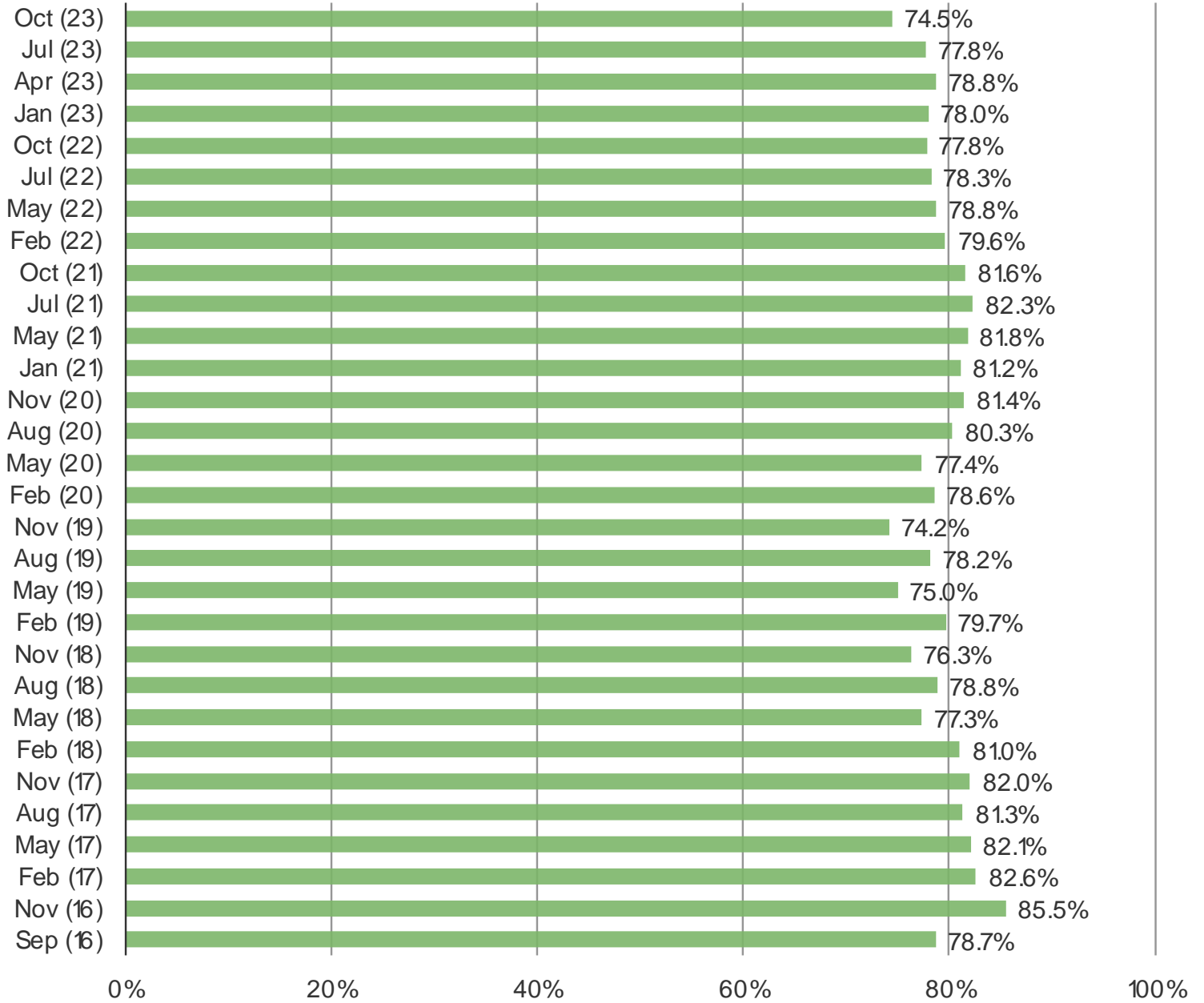
Posed to respondents who listen to Joe Rogan at least somewhat frequently



CONNECTED CAR

OWNS OR LEASES A CAR

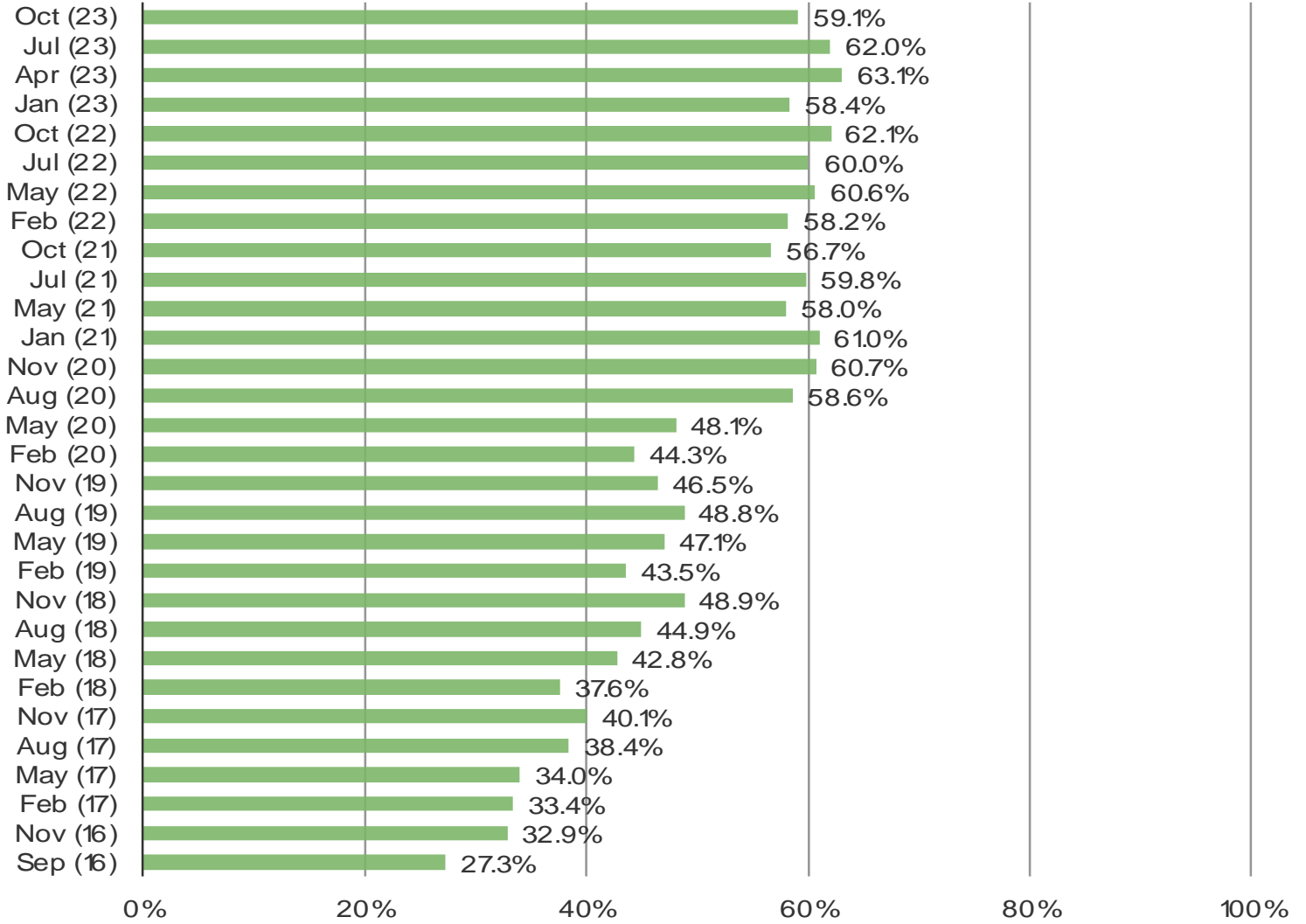
Posed to all respondents



Radio and Streaming Music

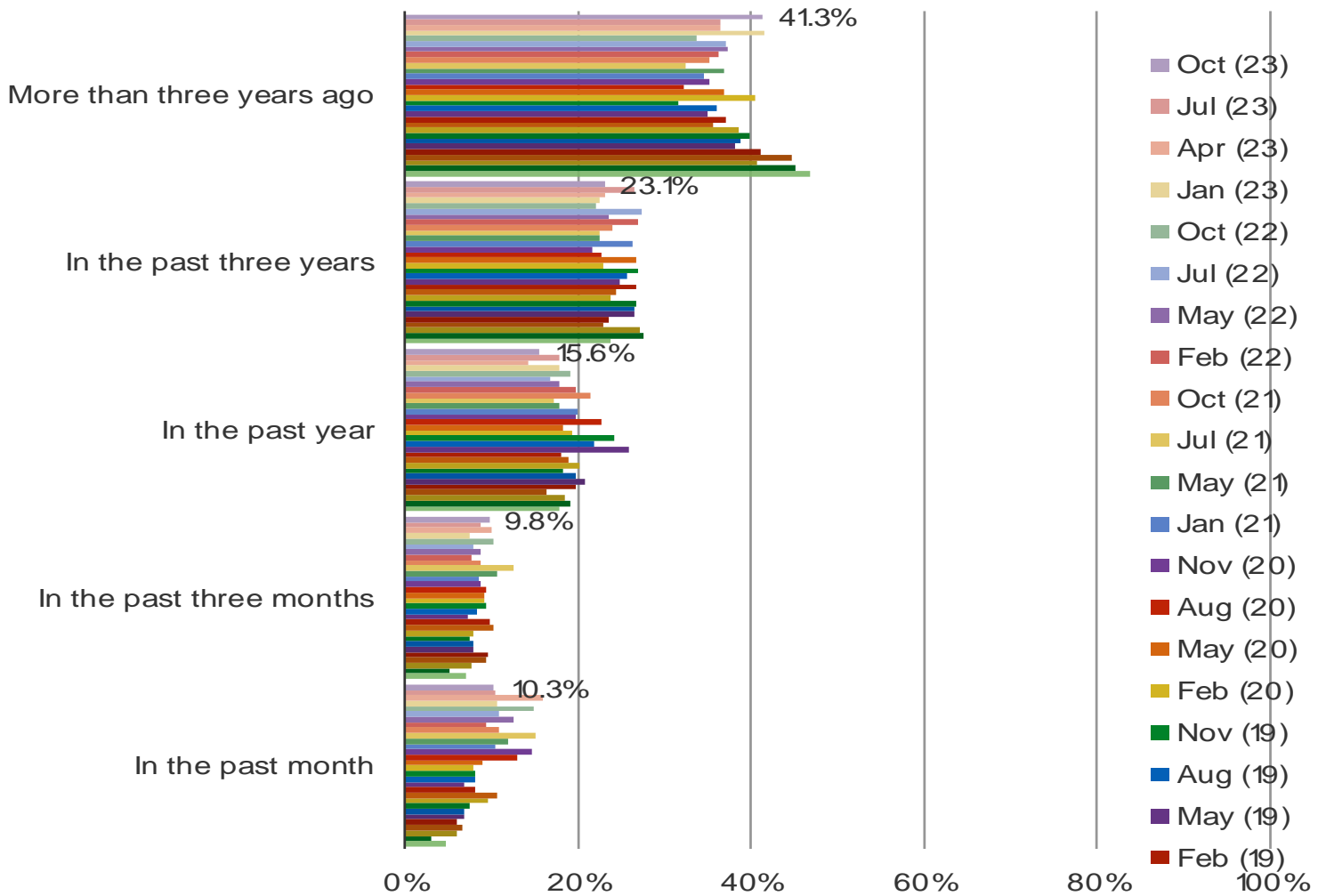
DO YOU EVER CONNECT A SMARTPHONE TO LISTEN TO MUSIC APPS IN YOUR CAR LIKE SPOTIFY, PANDORA, APPLE MUSIC, ETC?

Posed to all respondents who own / lease a car



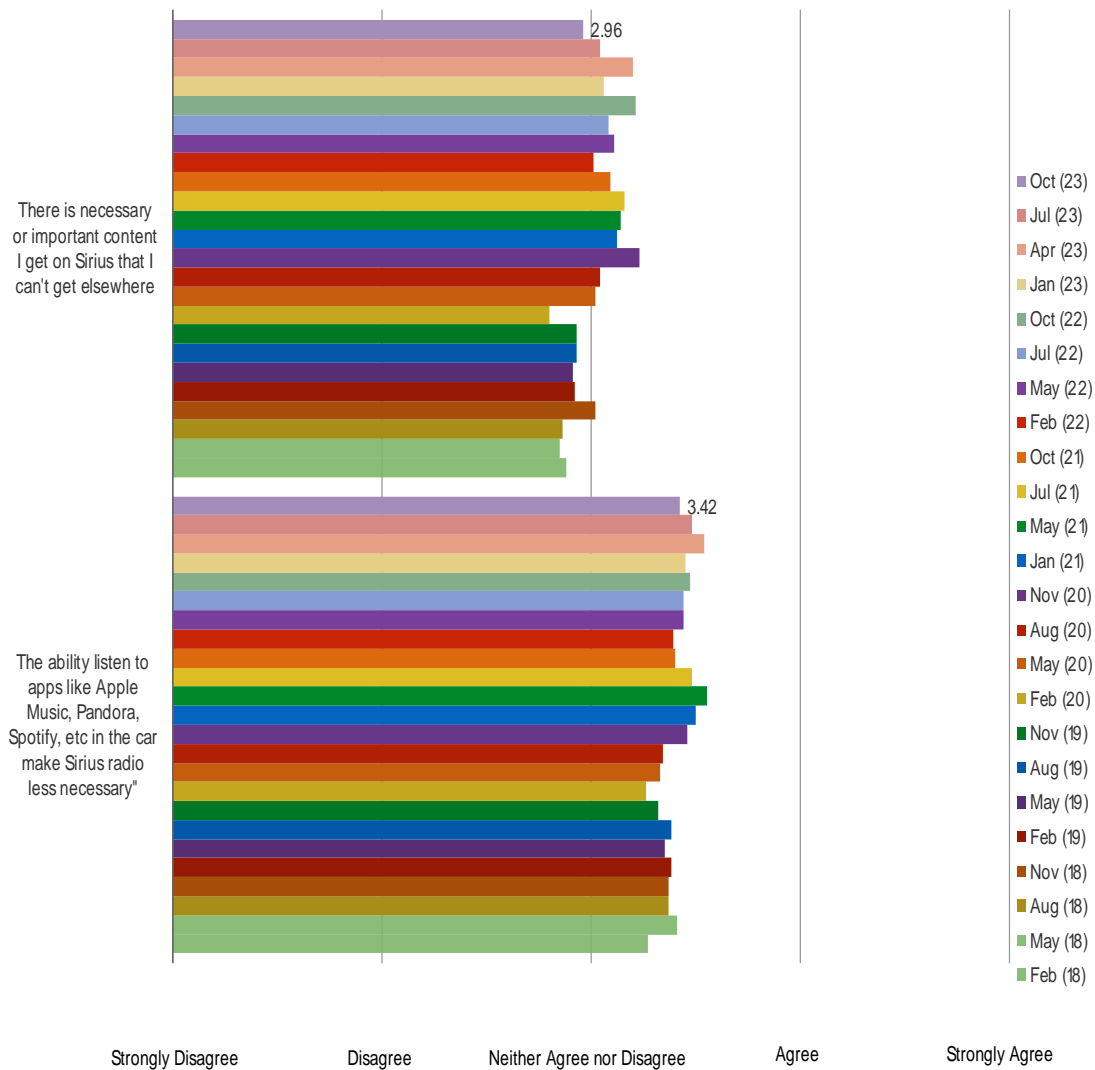
WHEN IS THE LAST TIME YOU PURCHASED OR LEASED A CAR?

Posed to all respondents who own / lease a car



HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS:

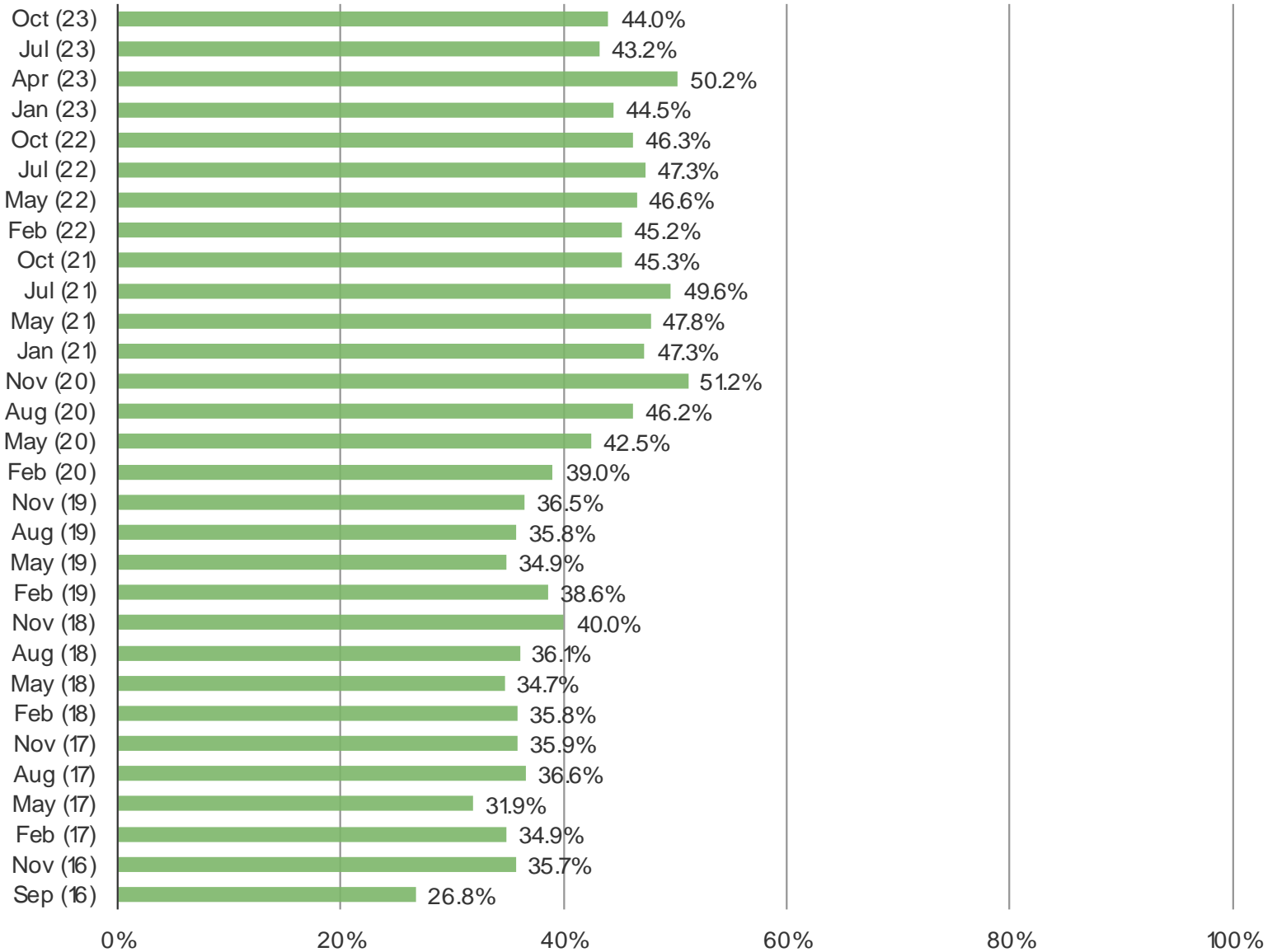
Posed to all respondents who own / lease a car



Radio and Streaming Music

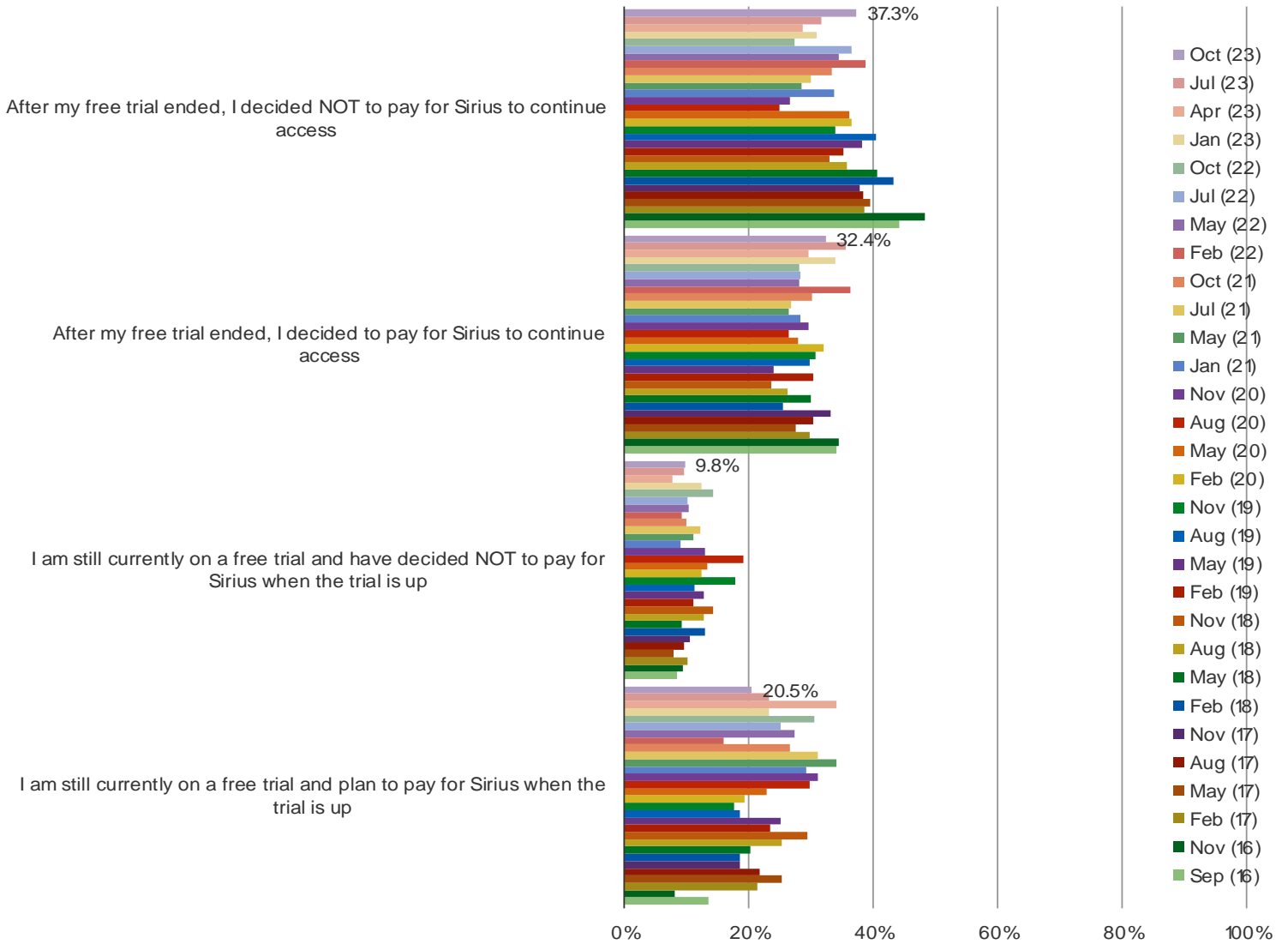
WHEN YOU MOST RECENTLY LEASED OR BOUGHT A CAR, DID IT COME WITH A FREE TRIAL TO SIRIUS RADIO?

Posed to all respondents who own / lease a car



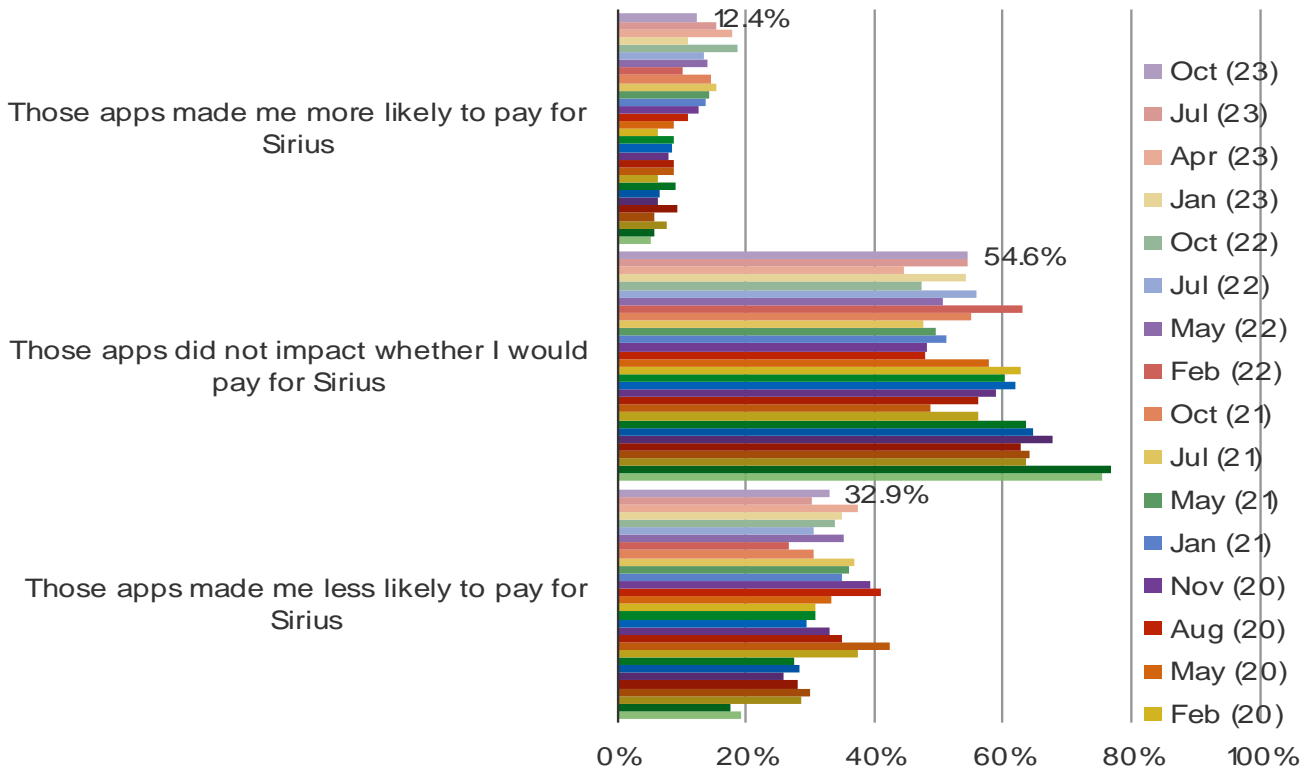
WHEN THE FREE TRIAL WAS UP, WHAT DID YOU DO?

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?

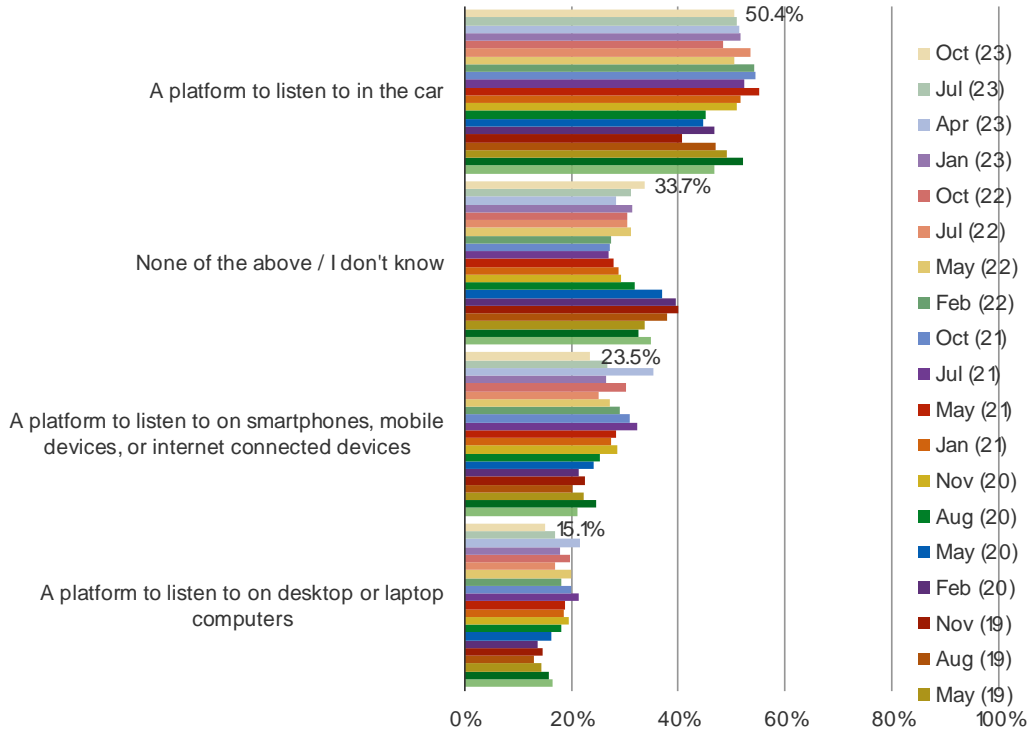
Posed to respondents who had/have a free trial when they most recently got a new car.



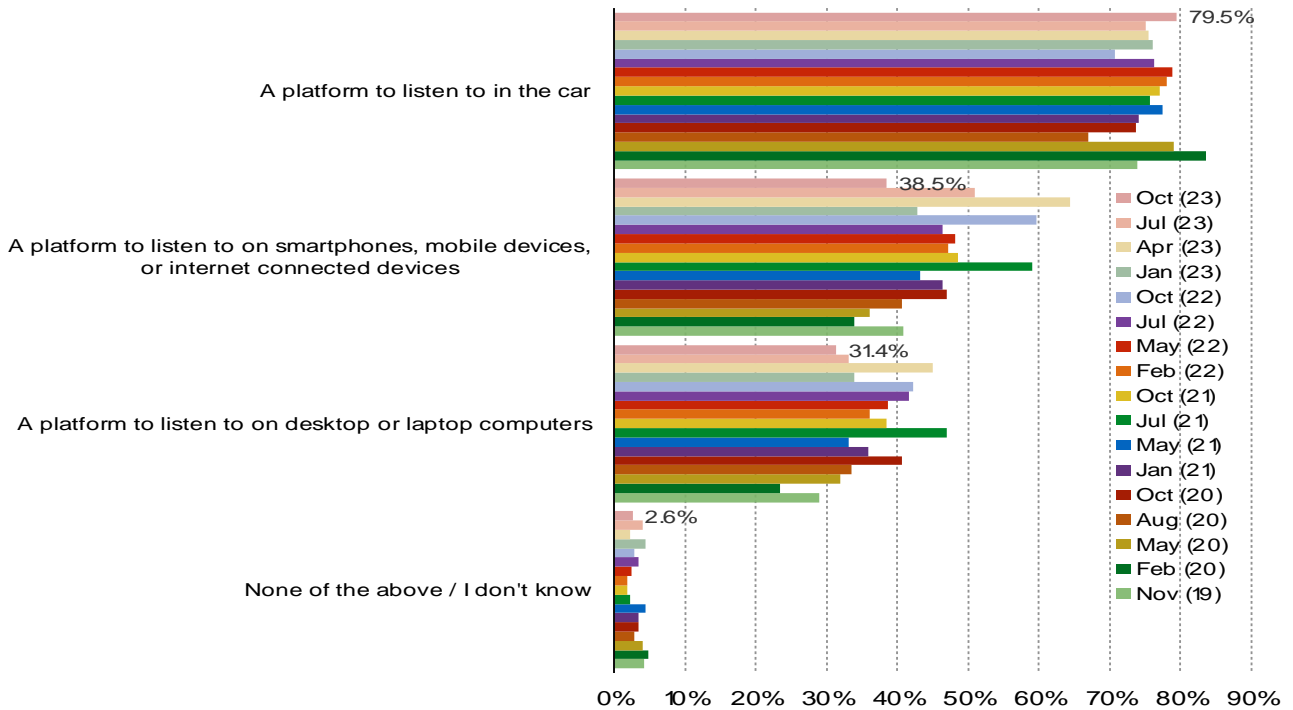
SIRIUS XM

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

Posed to all respondents.

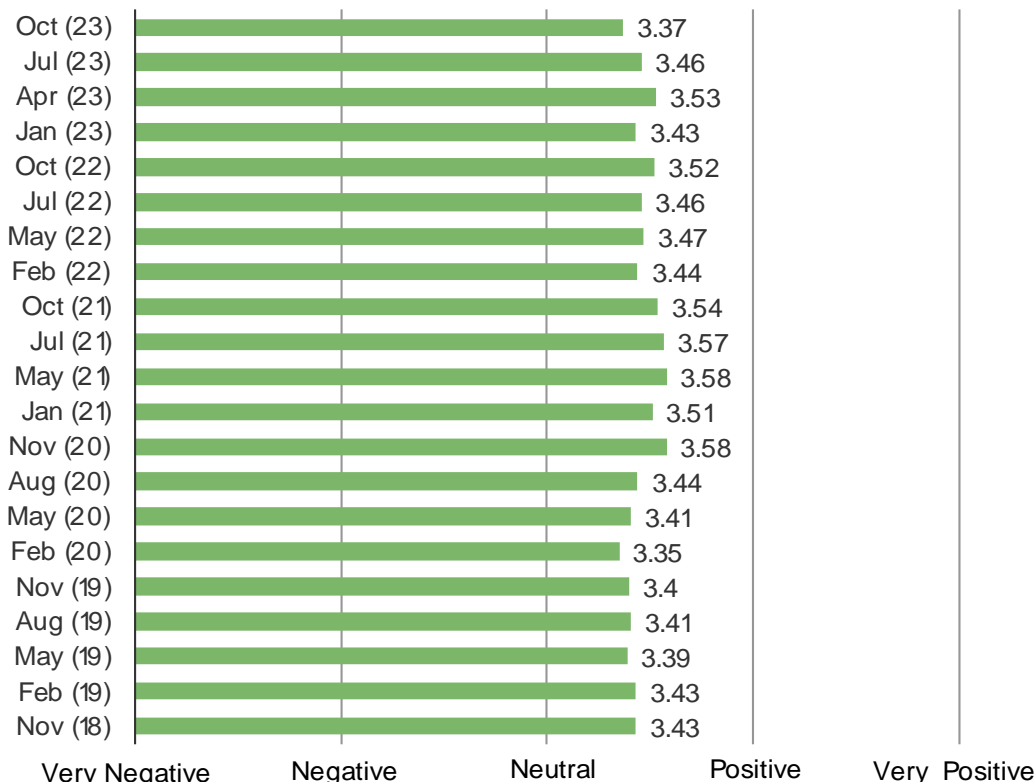


Posed to paying Sirius subscribers.

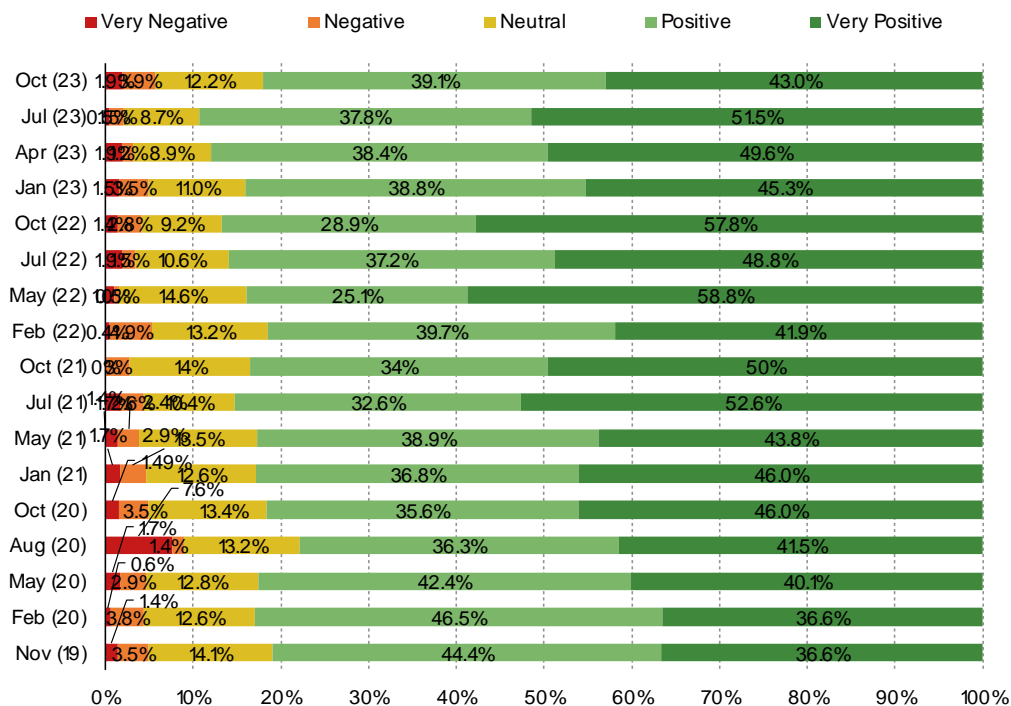


WHAT IS YOUR PERCEPTION OF SIRIUS XM?

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.

It's negative because they have a really lackluster customer support and overall lack of music selections

The music channels are mediocre and bad

They are expensive too

I don't listen to Sirius XM that much, it seems like a waste of money

It's outdated

its overpriced

Too many ads

Too expensive

I just dont like it

It just doesn't seem necessary anymore

Because I just don't like that channel

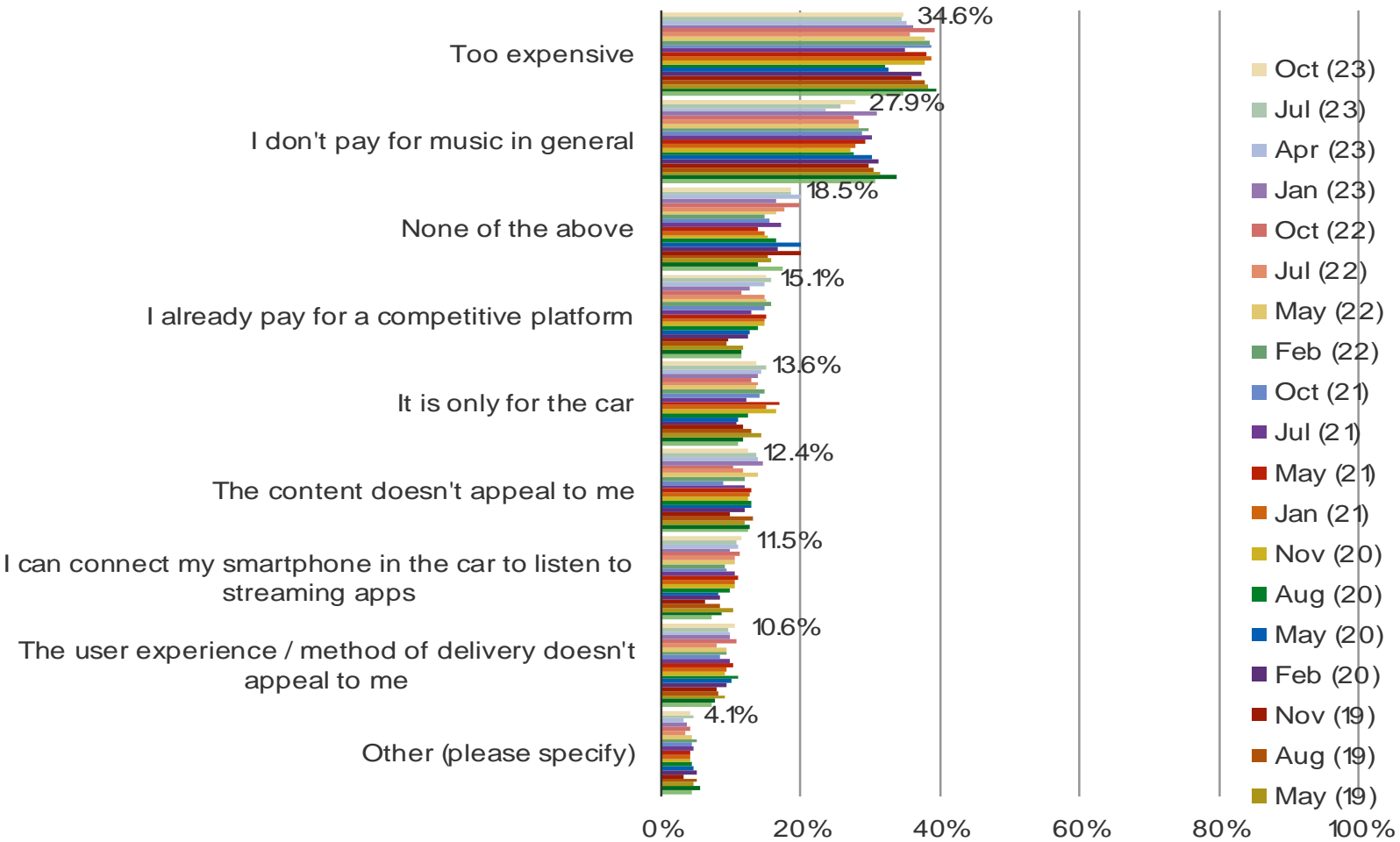
Kept billing us when we canceled

Because i dont like the type of services

I think its an outdated service

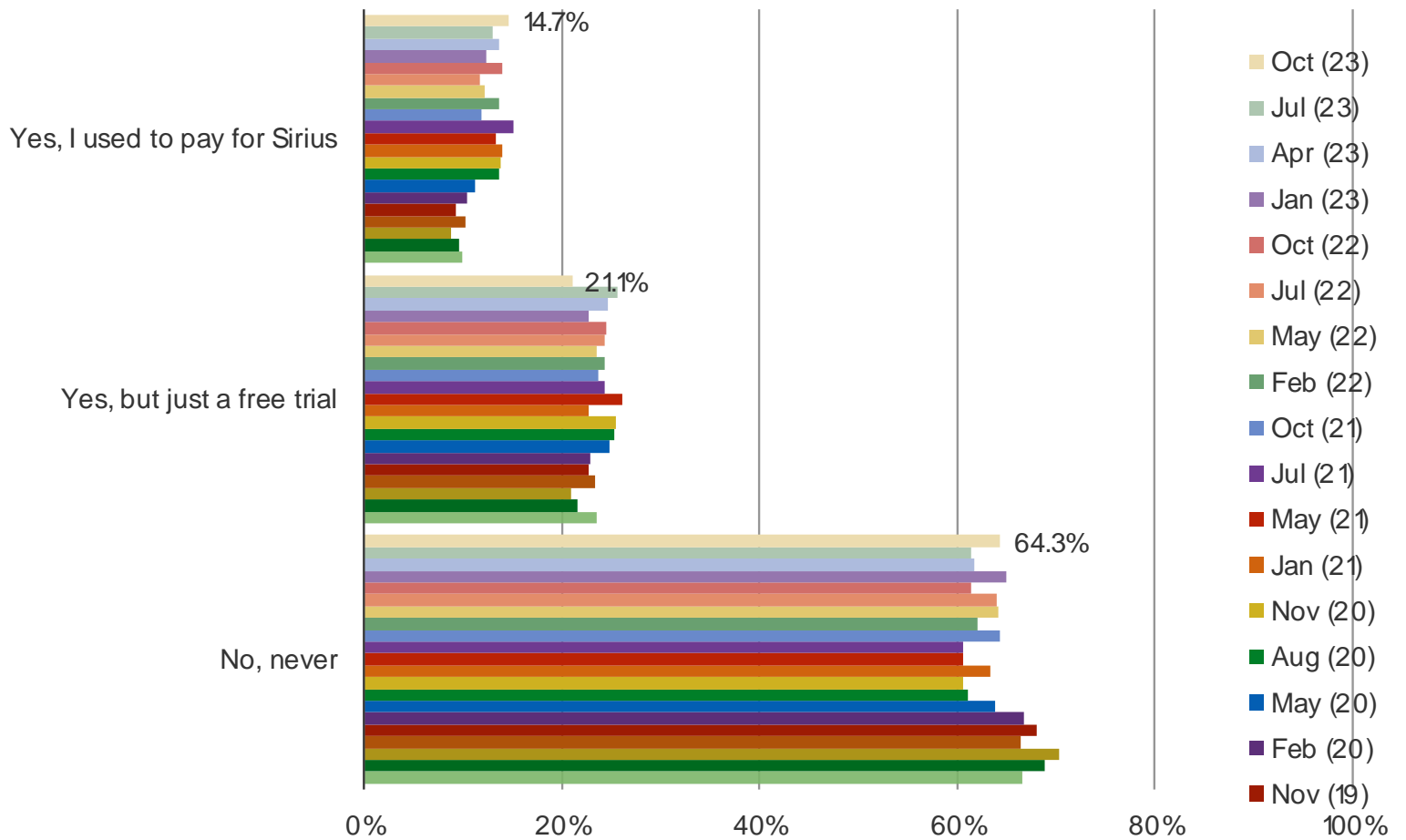
WHY ARE YOU NOT A SIRIUS XM SUBSCRIBER? (SELECT ALL THAT APPLY)

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



HAVE YOU EVER BEEN A SIRIUS XM SUBSCRIBER?

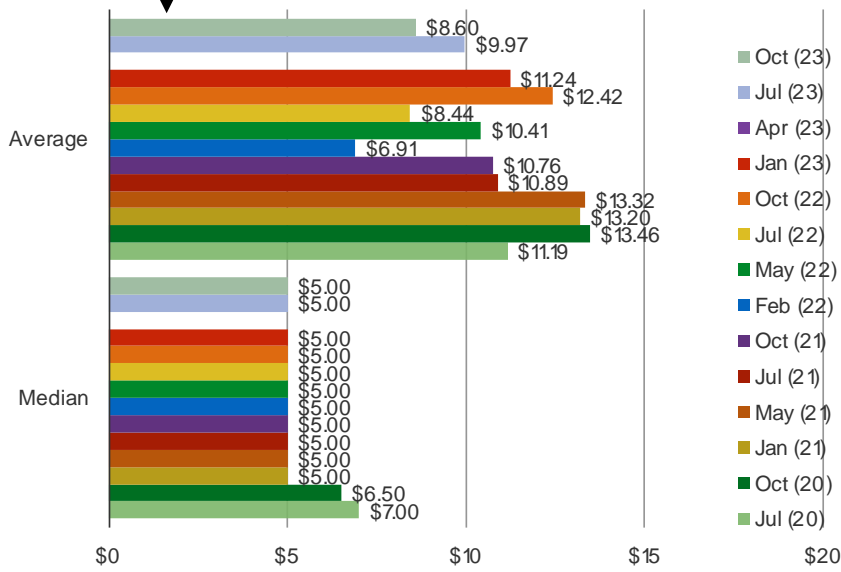
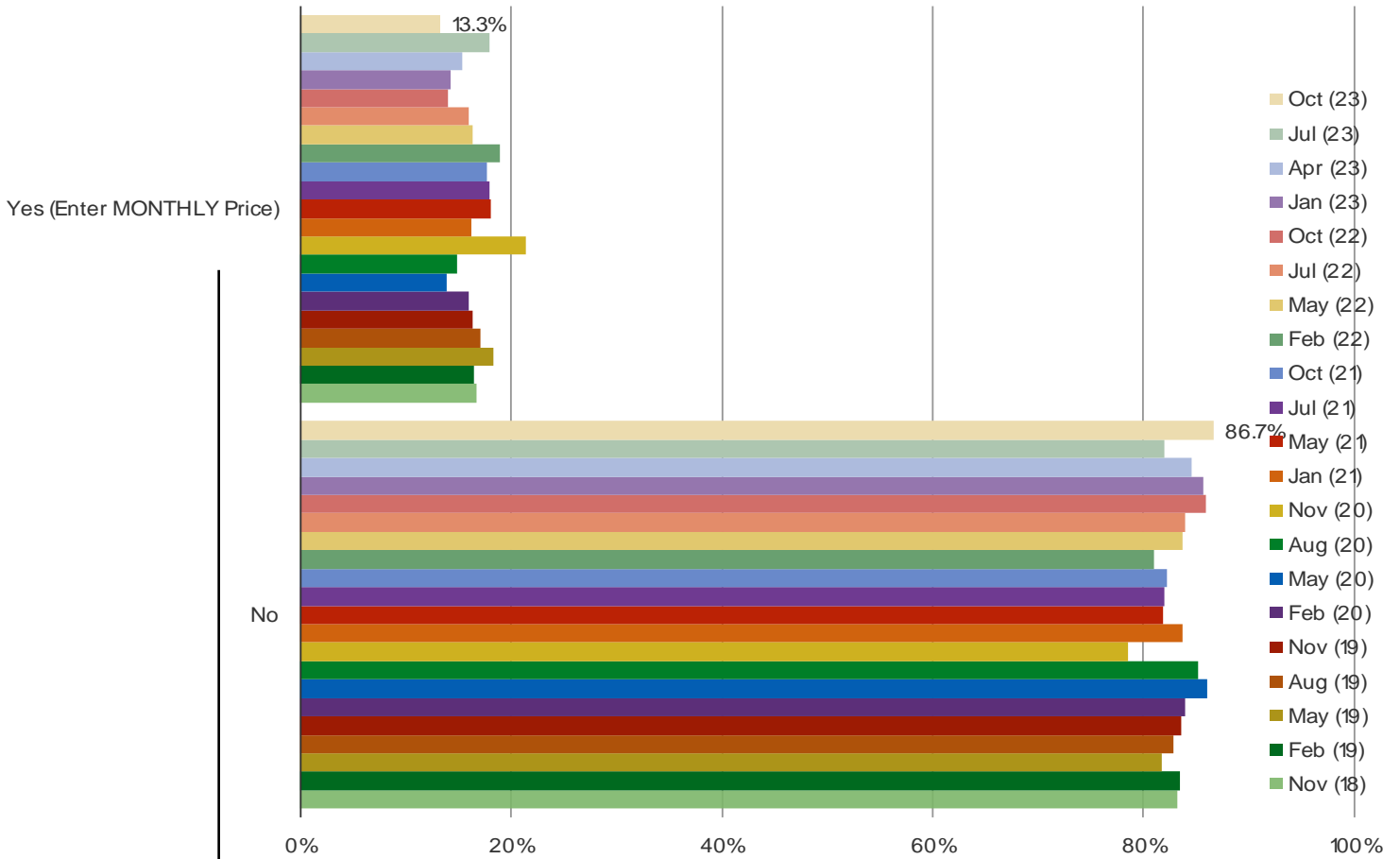
Posed to non-Sirius XM subscribers.



Radio and Streaming Music

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

Posed to non-Sirius XM subscribers.

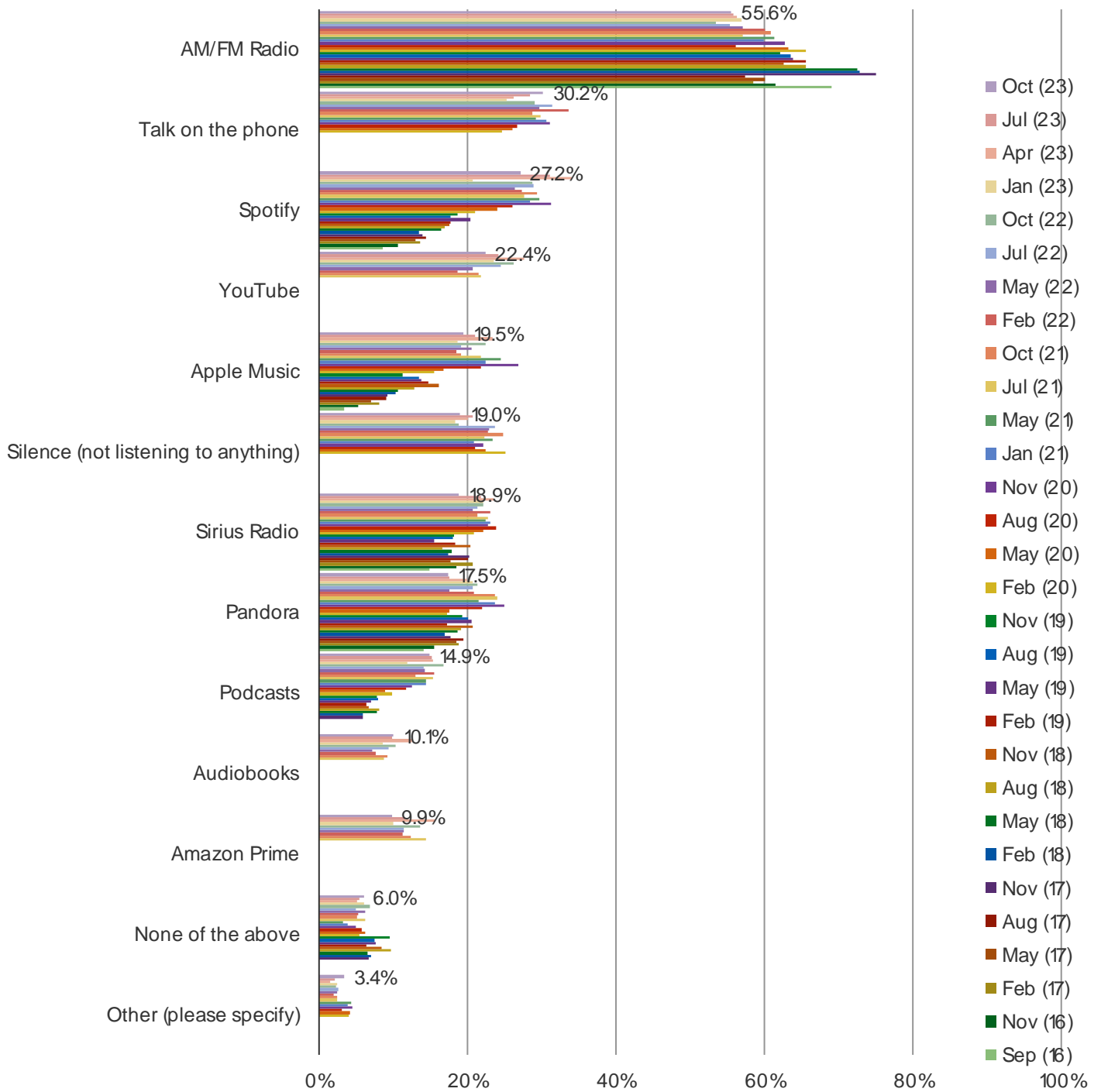


MARKET SHARE IN THE CAR

Radio and Streaming Music

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

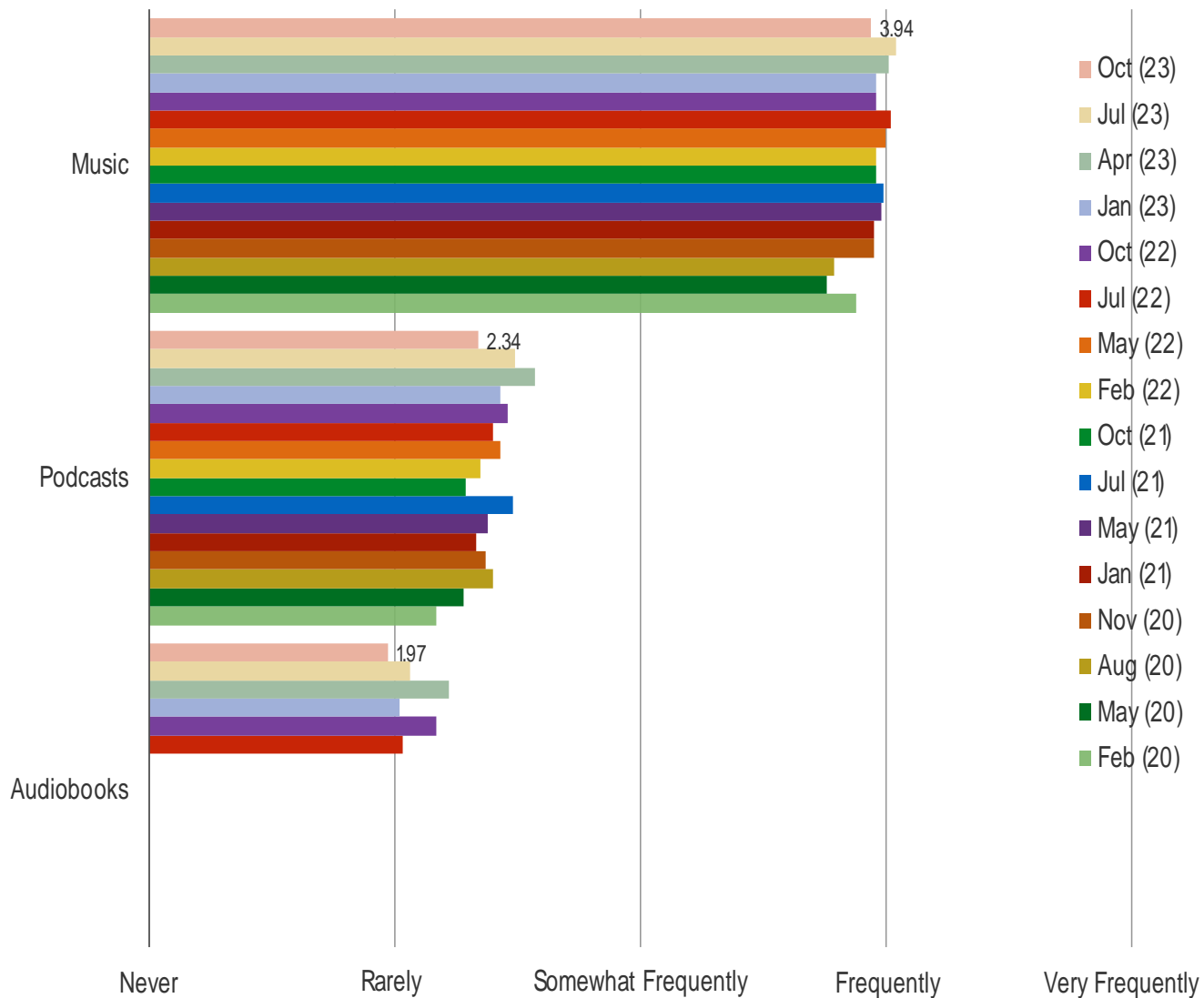
Posed to all respondents who own / lease a car



AIRPODS

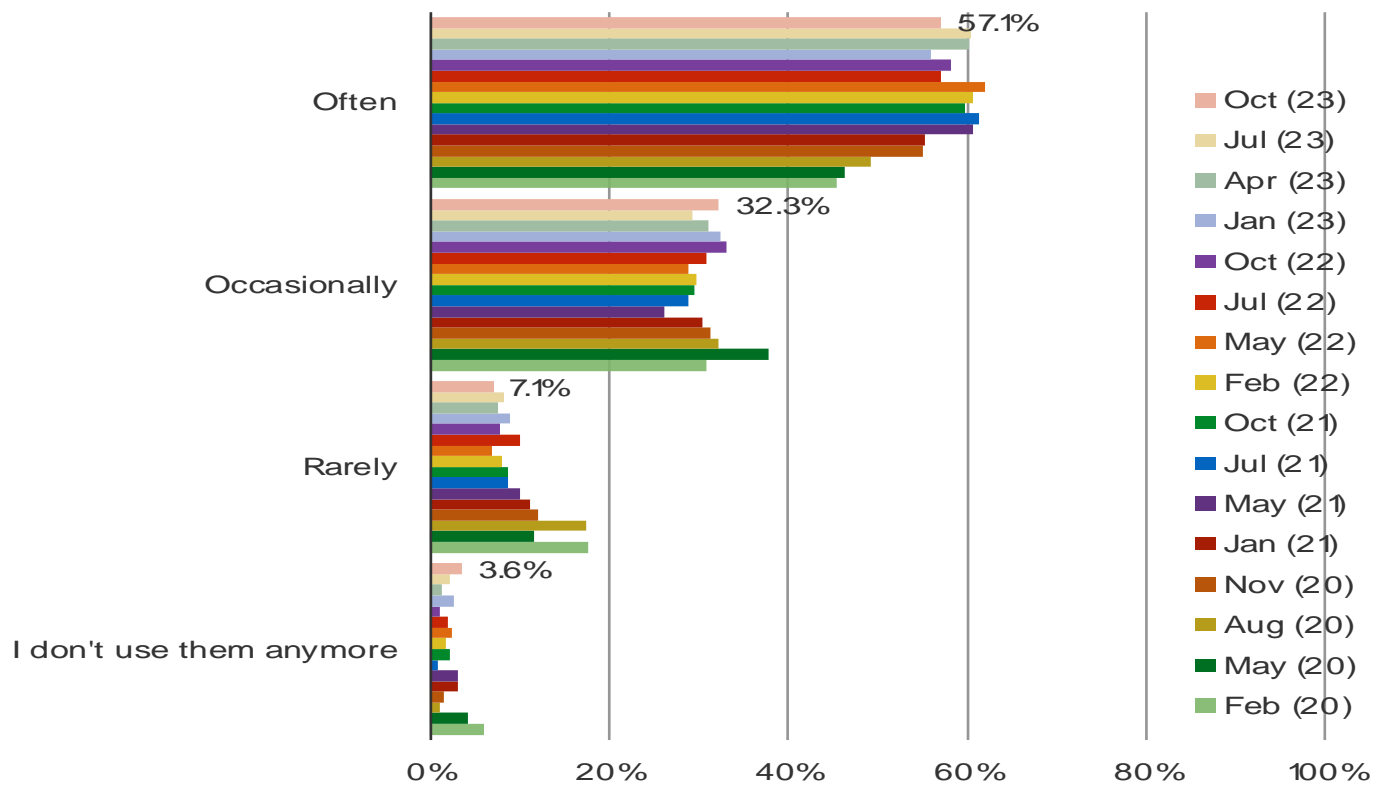
HOW OFTEN DO YOU LISTEN TO...

Posed to all respondents



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

