



Radio and Streaming Music

Volume 30 | Quarterly Survey

1,250 US Consumers Balanced To Census

Tickers Covered: SIRI, SPOT, AMZN, AAPL.

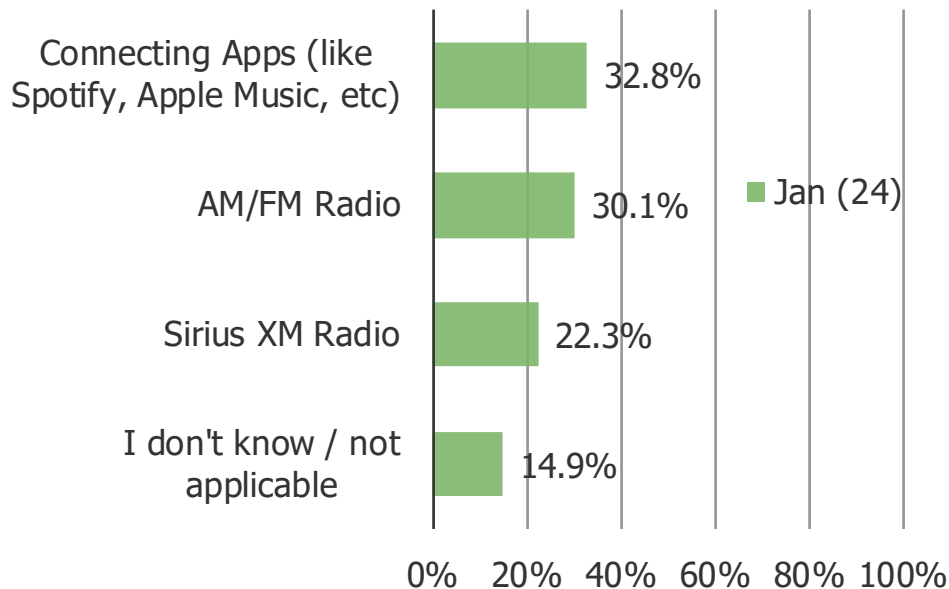
Key Takeaways:

- Sirius App Revamp: Consumers offer net-positive feedback around the design and interface of the revamped Sirius app. Among those who report having downloaded the app, feedback was generally positive (4.2 stars).
- While people offered generally positive sentiments – commentary on content on the app was more positive than commentary on the interface. In verbatims, there were a couple respondents who said that when they were not listening to music, it is harder to rewind/jump forward during shows.
- However, feedback was more lukewarm among those who had not downloaded the Sirius XM app with commentary suggesting that most would probably not pay for it.
- Among streaming music users, the top catalysts for choosing apps include ease of use, variety, price, and no ads.
- User metrics (account holders free and paid / engagement frequency were generally in-line with last wave).
- Consumers continue to shift their preferences toward picking individual songs, interviews or playlists to listen to and away from picking a channel or station and having it play content for them.
- Sentiment based feedback toward both YouTube Music and Spotify remains positive / strong.

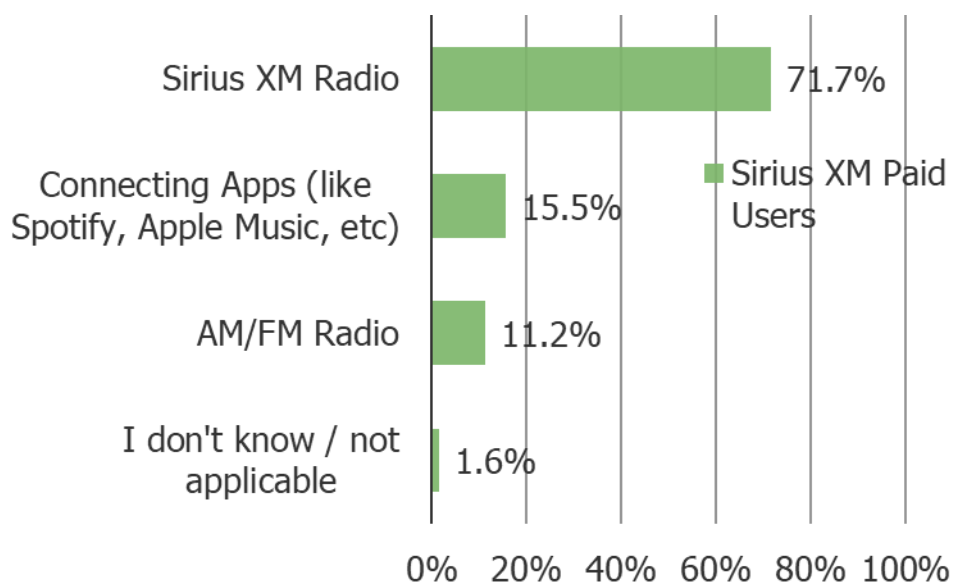
NEW QUESTIONS

IN YOUR OPINION, WHICH IS BEST FOR LISTENING IN THE CAR?

Posed to all respondents. (N=1252)

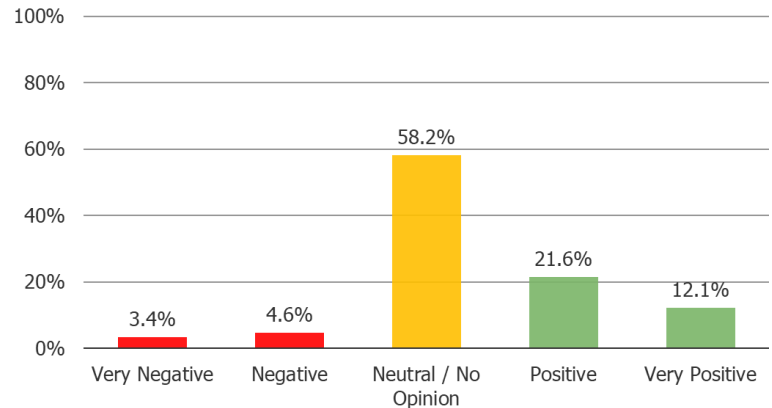


Posed to paid Sirius XM users.



SIRIUS XM LAUNCHED A NEW APP AND WEBSITE INTERFACE IN DECEMBER. WHAT IS YOUR OPINION OF HOW THE REDESIGN LOOKS? RESPONDENTS WERE SHOWN THE IMAGE BELOW...

Posed to all respondents. (N=1252)



Optional Comments (Why?), analyzed by ChatGPT

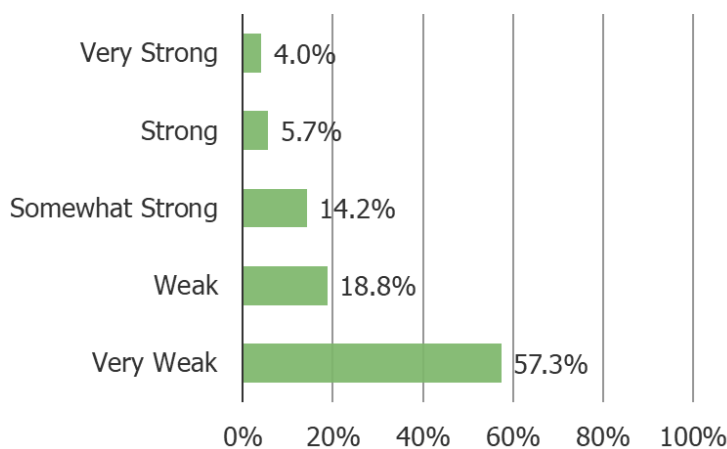
The sentiment toward the Sirius XM app can be summarized based on the sentiment categorization as follows:

- **Positive Sentiment:** The positive comments, totaling 48, highlight that users find the app to have good options for different types of music and consider it interesting. Some users perceive the app as fun and commend its visual appeal and ease of use. They also describe it as looking good and efficient, with one user specifically calling it a "great app."
- **Negative Sentiment:** There are 21 comments with a negative sentiment, where users have expressed a lack of awareness or usage of the app, with some saying they have "never heard" of it or "never used" it. Comments like "WHAT A MESS." and "Cluttered" indicate dissatisfaction with the app's design, with some users finding it too busy and suggesting that simplification could improve user friendliness.
- **Neutral Sentiment:** Neutral comments, which are 12 in total, typically reflect a lack of engagement or neutrality toward the app without expressing a specific positive or negative stance. These comments include phrases like "I have not used it" and "No comment," showing either a lack of experience with or indifference to the app.
- **Uncategorized Sentiment:** There are 87 comments that remain uncategorized, which could indicate either a more complex sentiment not captured by the keywords or comments that didn't provide enough context to determine sentiment.

In summary, among the categorized comments, there are more than twice as many positive sentiments expressed as negative ones. However, a significant portion of the feedback remains neutral or lacks enough information for categorization, which suggests that while those who have an opinion tend to view the app favorably, there is also a substantial number of users who are either indifferent, unaware, or have mixed feelings that are not easily categorized. [-]

YOU MENTIONED THAT YOU HAVE NOT DOWNLOADED THIS APP. HOW MUCH INTEREST DO YOU HAVE IN PAYING \$9.99 PER MONTH TO USE IT?

Posed to all respondents who have not downloaded the new Sirius XM app. (N=1040)



Why? Optional Comments

Top Reasons For Downloading:

1. "Good price" - This reason was mentioned twice, indicating that some users find the pricing of the app reasonable or appealing.
2. Interest in the app's offerings - Some users have indicated a specific interest in the content or features of the app.
3. "Because it's a great app" - At least one user believes the app is great, which could be due to its content, user experience, or other factors.

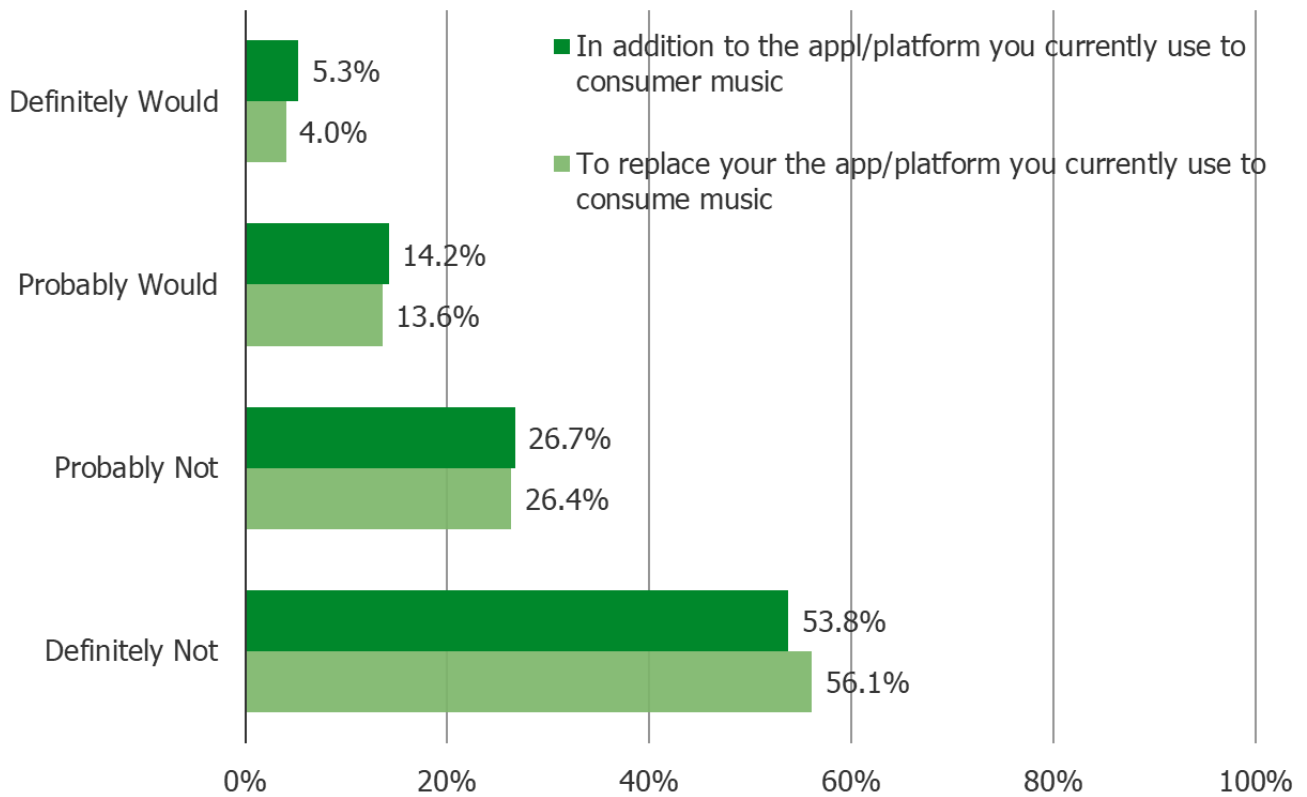
Top Reasons Against Downloading:

1. "Too much" / "Too expensive" - These reasons were mentioned a combined total of 9 times, showing that the cost is a significant barrier for many users.
2. "I already have music apps" - Users who already have other music apps do not see the need to download another one.
3. Lack of interest - Some users simply express no interest in the app, which might be due to satisfaction with current services or indifference towards Sirius XM's offerings.

It is important to note that the reasons against downloading are more frequently mentioned in the comments, particularly concerning the cost and the presence of alternative music apps. [-]

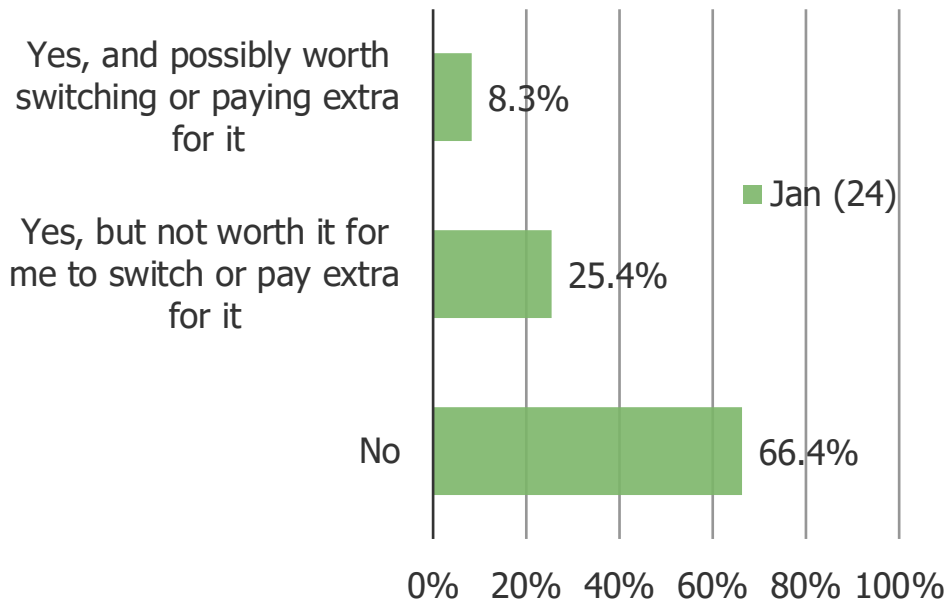
THE REVAMPED SIRIUS APP COSTS \$9.99 PER MONTH TO GET ACCESS TO SIRIUS XM CONTENT. WOULD YOU CONSIDER PAYING TO USE IT...

Posed to all respondents who have not downloaded the new Sirius XM app. (N=1040)



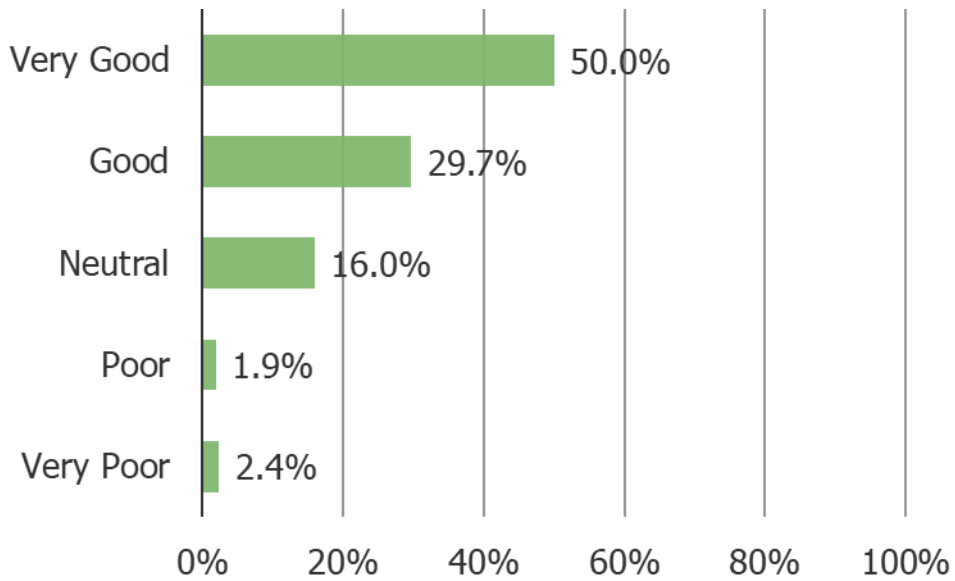
DO YOU THINK THE NEW SIRIUS APP WOULD GET YOU ANYTHING YOU WOULD NOT CURRENTLY HAVE ACCESS TO IN YOUR CURRENT METHOD FOR LISTENING TO MUSIC/AUDIO CONTENT?

Posed to all respondents who have not downloaded the new Sirius XM app. (N=1040)



HOW WOULD YOU RATE THE NEW SIRIUS APP, OVERALL?

Posed to all Sirius subscribers who have downloaded the new Sirius XM app. (N=83)

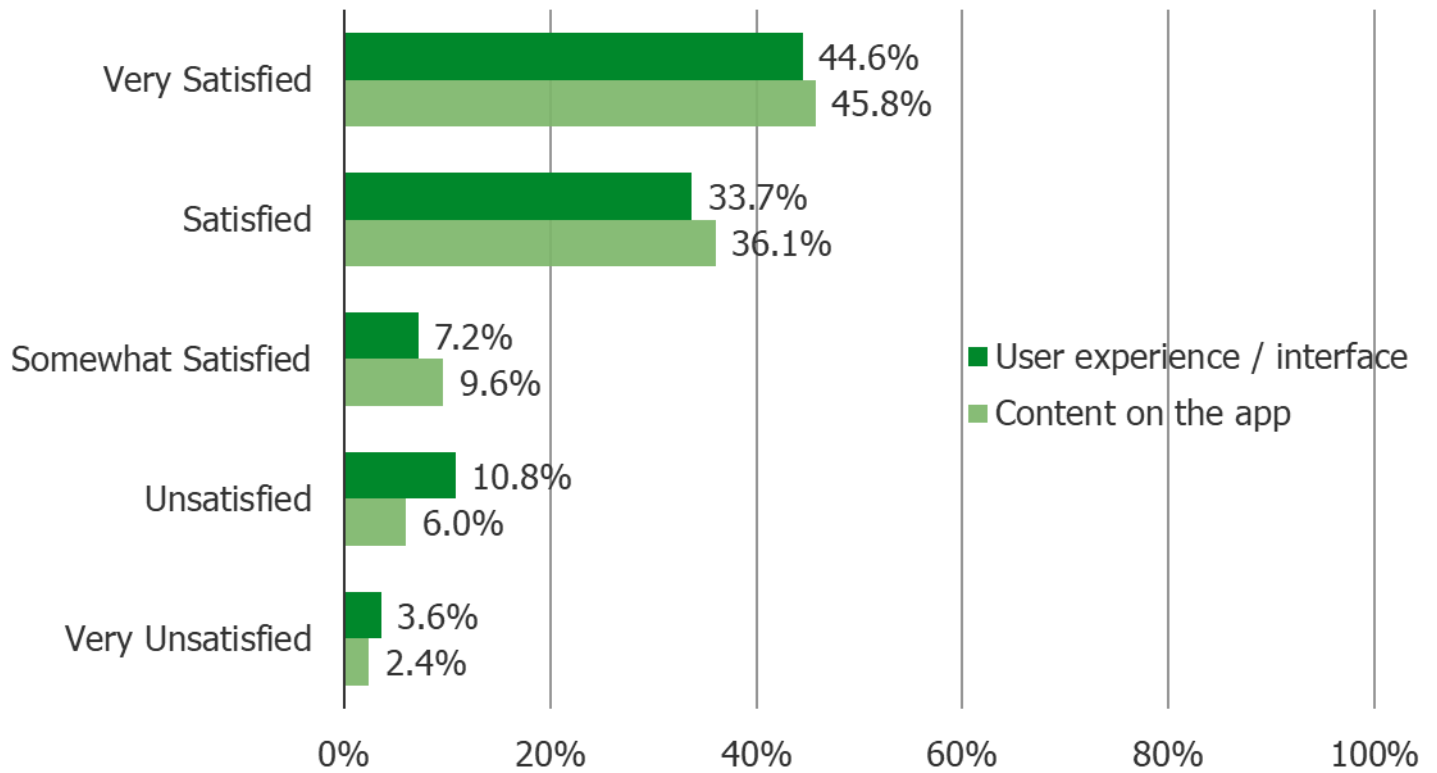


4.2★
average rating



HOW WOULD YOU RATE THE REDESIGNED SIRIUS APP WHEN IT COMES TO...

Posed to all respondents who have downloaded the new Sirius XM app. (N=83)



OPTIONAL - IF YOU COULD GIVE THE CEO OF SIRIUS XM FEEDBACK ABOUT THE REDESIGNED APP, WHAT WOULD YOU TELL THEM?

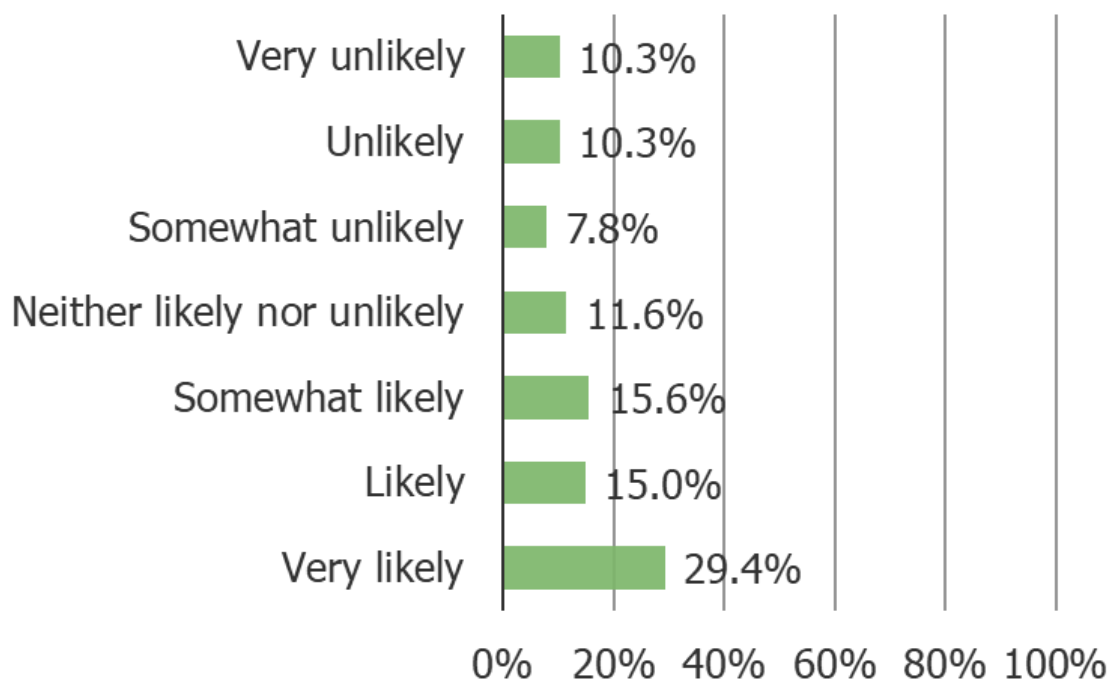
Posed to all respondents who have downloaded the new Sirius XM app. (N=83)

- Awesome
- Awesome app
- Bigger selection
- create one that car users can connect to
- Excellent
- Excellent
- Go back to what it was before. If it ain't broke, don't fix it
- Good Job!
- great
- Great
- Great service
- I like this app
- I love the new app
- I need more videos
- I really don't have an opinion as of yet, since I haven't used outside of the vehicle yet to really use the app itself. But, I'm sure the changes would be good, if not a big improvement.
- I think it's great
- I would say to him that, add more music content like Spotify and Apple Itunes
- It is a nice app
- It is awesome
- It is reliable
- Less connection issues keep price low
- Looks good
- Make it easier to find and use favorite channels
- Make it free
- Makes the interface more smooth
- More interested music
- More user friendly
- The new design is better
- There are more people who use SiriusXM than just those listening to songs. The new app makes it a lot harder to listen to show, rewind to earlier shows and eliminates ability to go back a few seconds. You can hold and slide the timeline, but it is very imprecise and very difficult (unsafe) if driving. Actually, the new app presents a safety hazard due to this. There were improvements in the new app, but clearly not enough user engagement to test/listening to users. Or perhaps you are trying to get rid of a segment of users.

SPOTIFY APP REDESIGN AND FEATURE TESTING

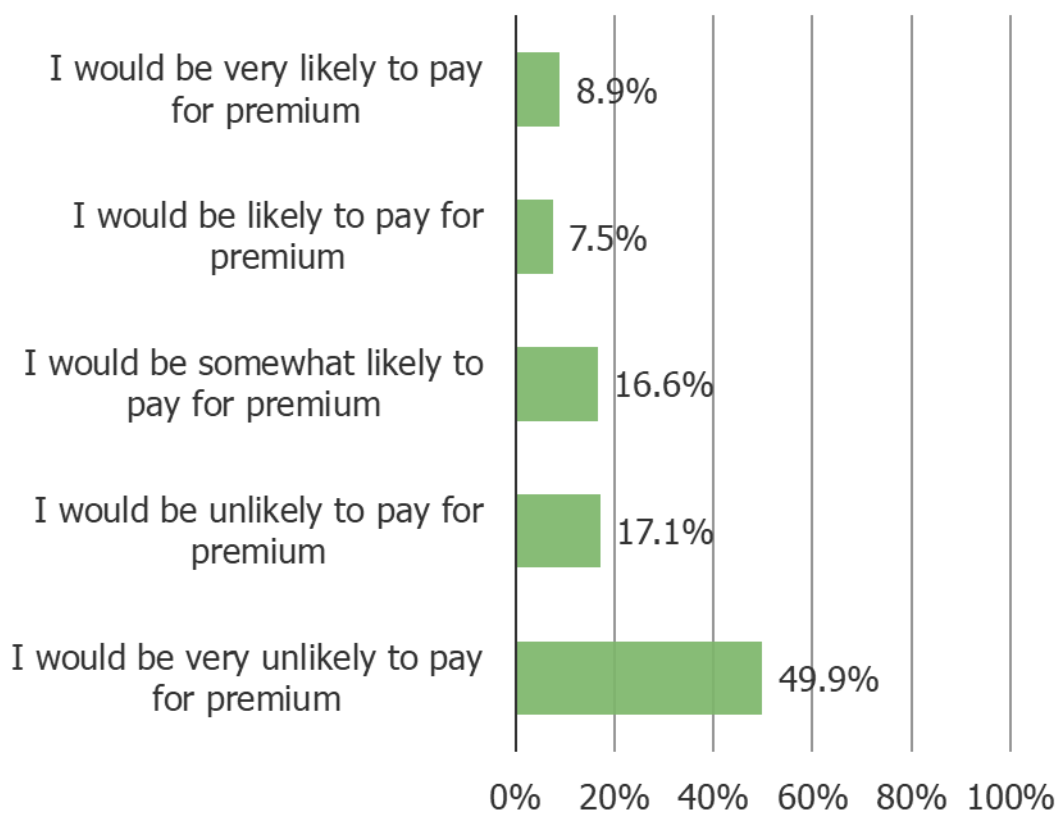
HOW LIKELY WOULD YOU BE TO SWITCH TO A HIGHER LEVEL OF SPOTIFY PREMIUM ("SPOTIFY SUPREMIUM) FOR \$19.99 PER MONTH FOR FEATURES THAT WOULD INCLUDE "HIFI", HIGH FIDELITY AUDIO, LOSSLESS AUDIO, AI GENERATED PLAYLISTS, STUDIO SOUND, HEADPHONE TUNER, LIBRARY PRO?

Posed to respondents who have a paid account with Spotify... (N = 320)



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 = 932)

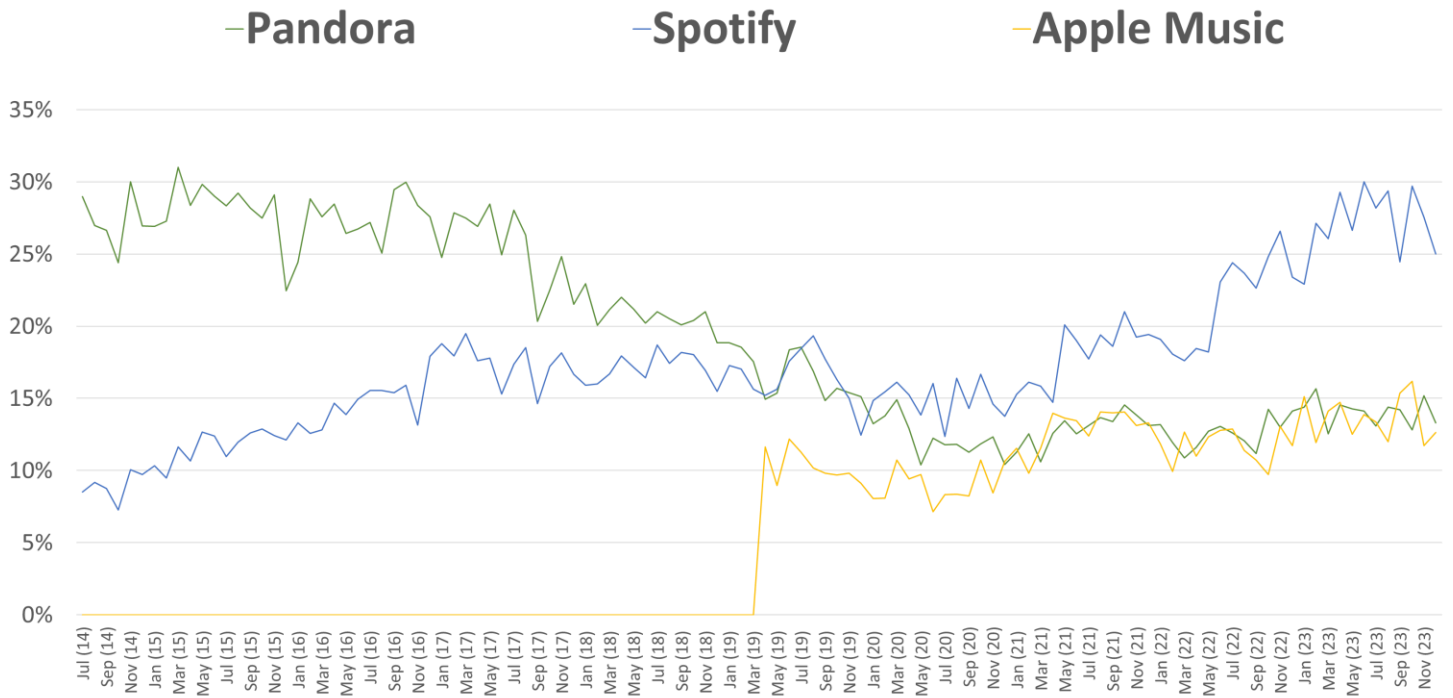


STREAMING PLATFORM DECISION CATALYSTS AND CRITERIA

COMPETITIVE DYNAMICS, STREAMING APPS

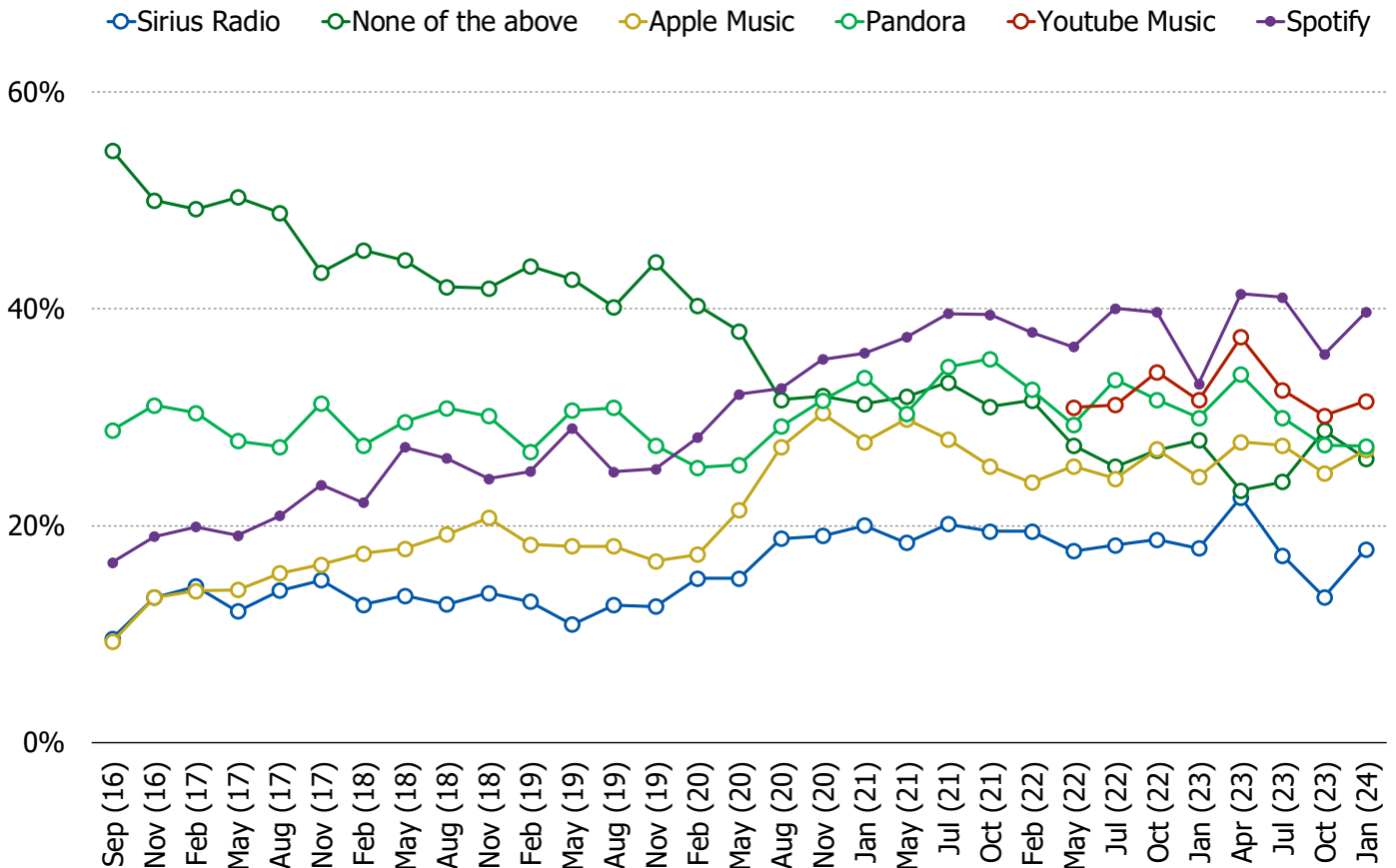
MONTHLY SURVEY TRACKER (DO YOU CURRENTLY HAVE AN ACCOUNT WITH ANY OF THE FOLLOWING)?

Posed to all respondents.



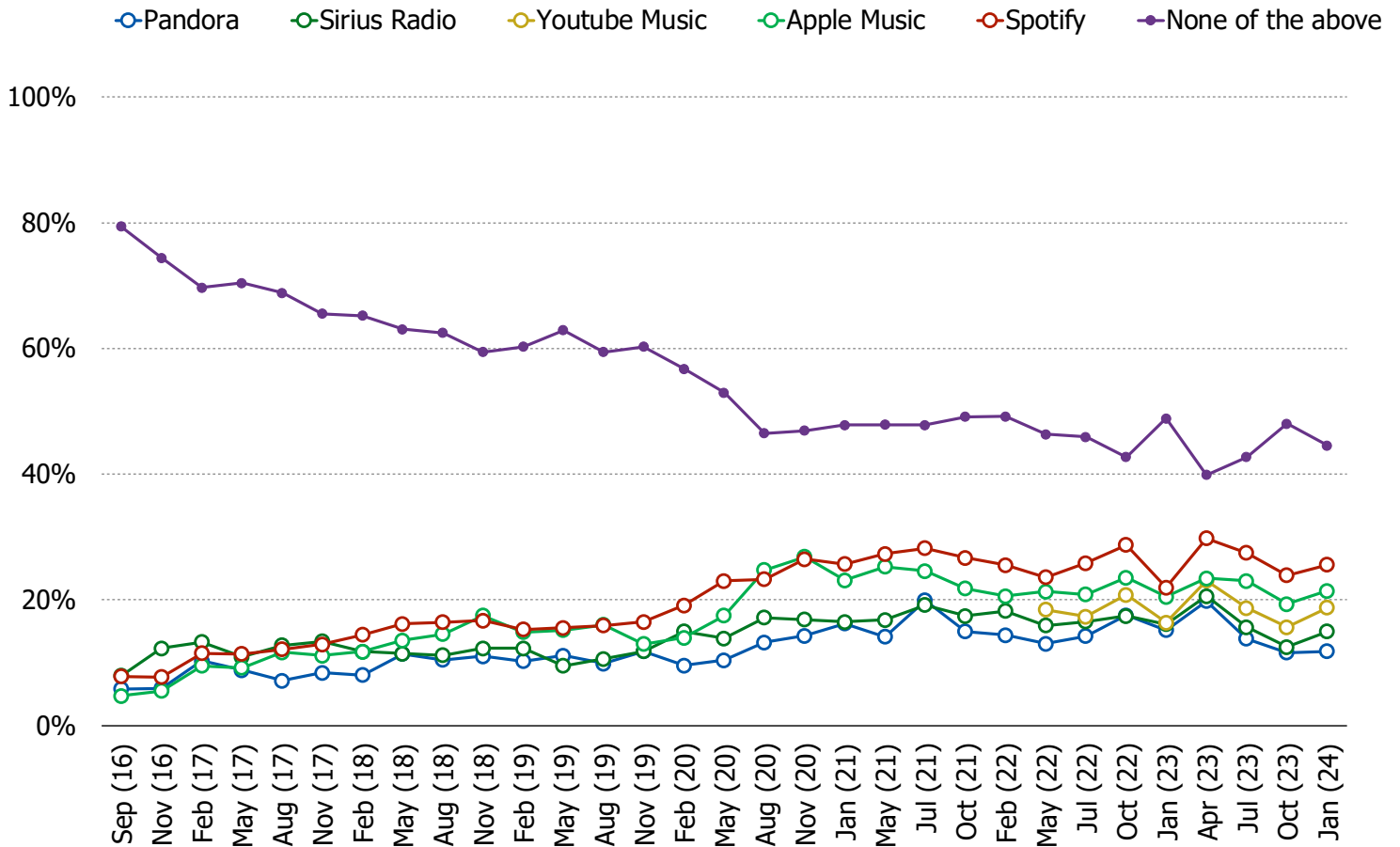
DO YOU HAVE AN ACCOUNT WITH ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.



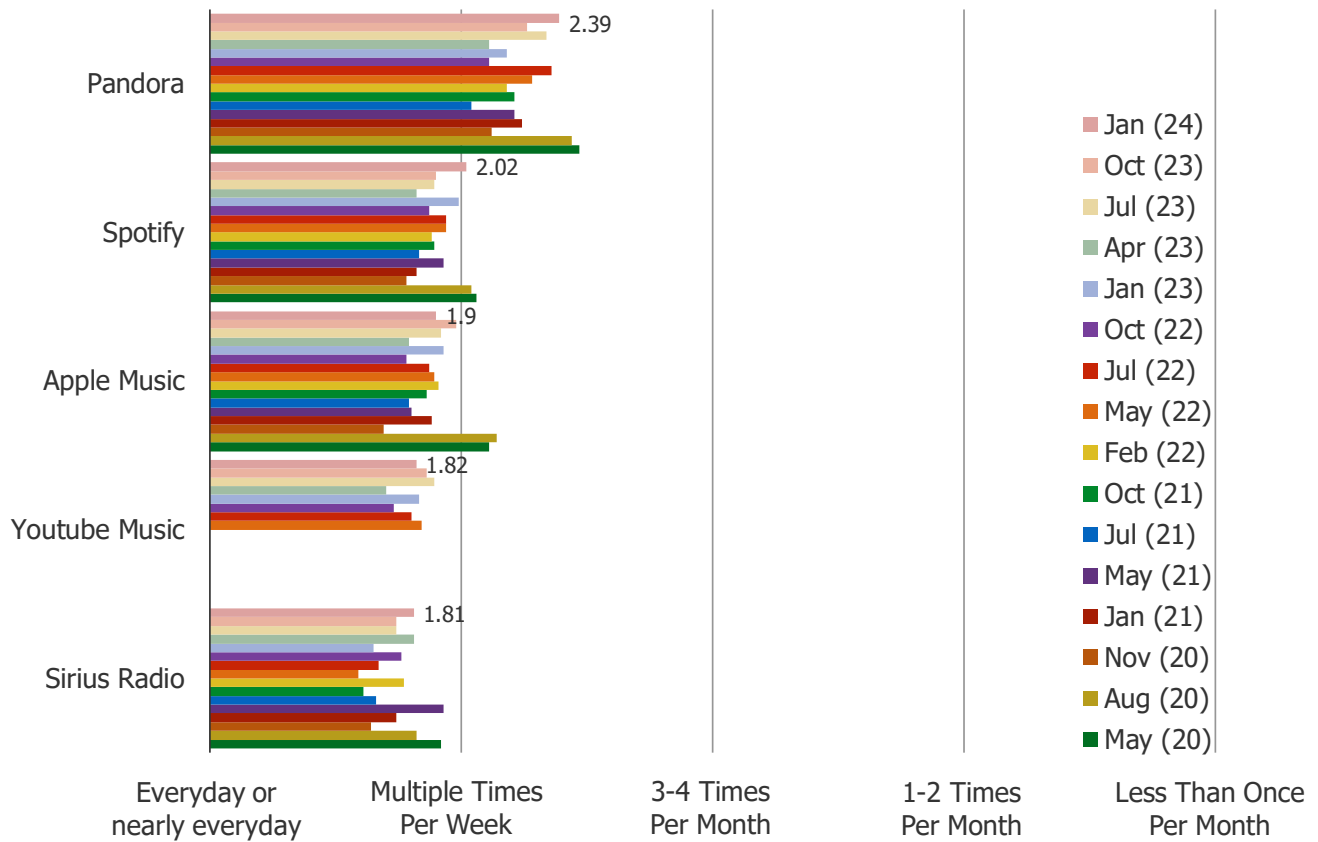
ARE YOU CURRENTLY PAYING FOR A SUBSCRIPTION WITH ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents.



HOW OFTEN DO YOU USE THE FOLLOWING?

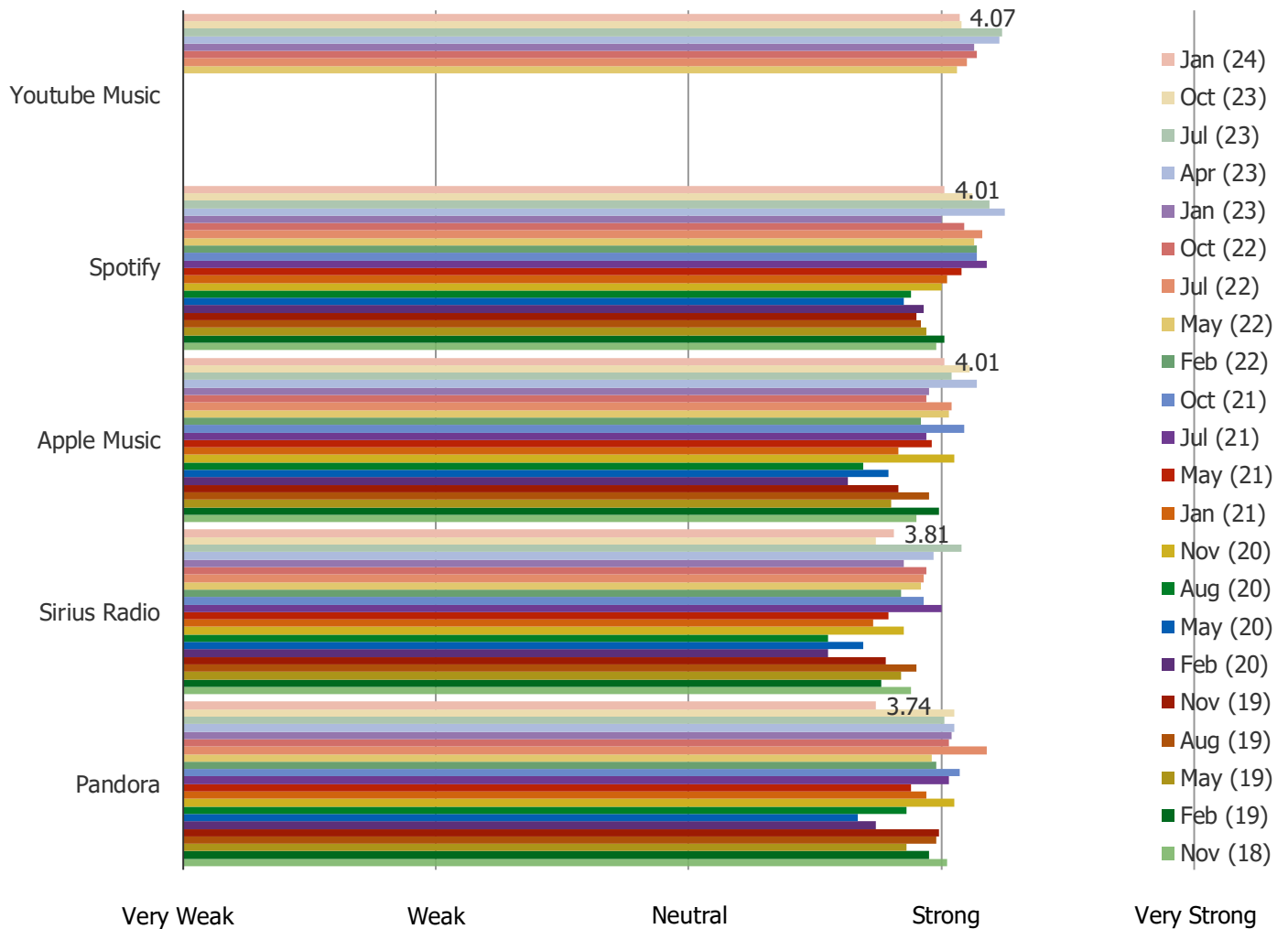
Respondents who have an account with each platform (free or paid)



← More Frequent

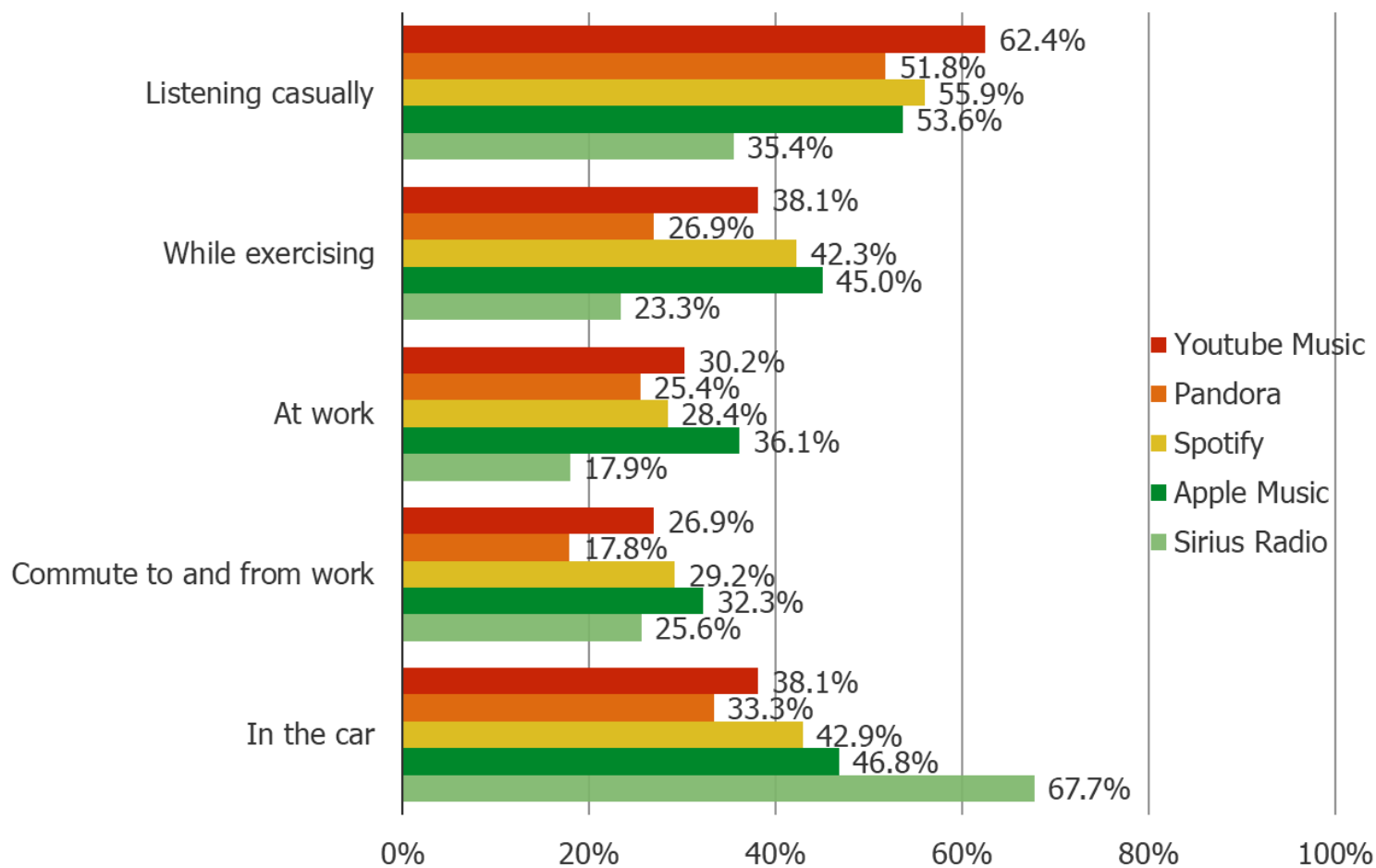
WHAT IS YOUR OPINION OF THE VALUE YOU GET FOR YOUR MONEY IN PAYING FOR THIS PLATFORM?

Respondents who pay for each platform



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

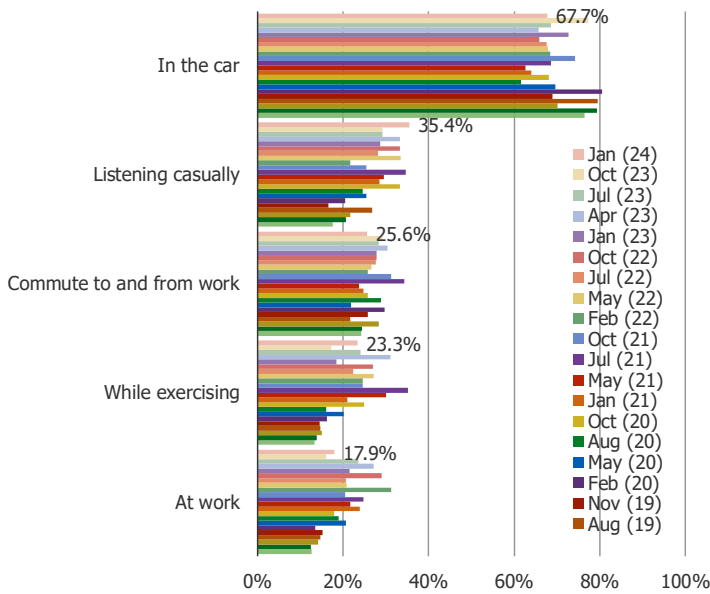
Respondents who have an account with each platform (free or paid)



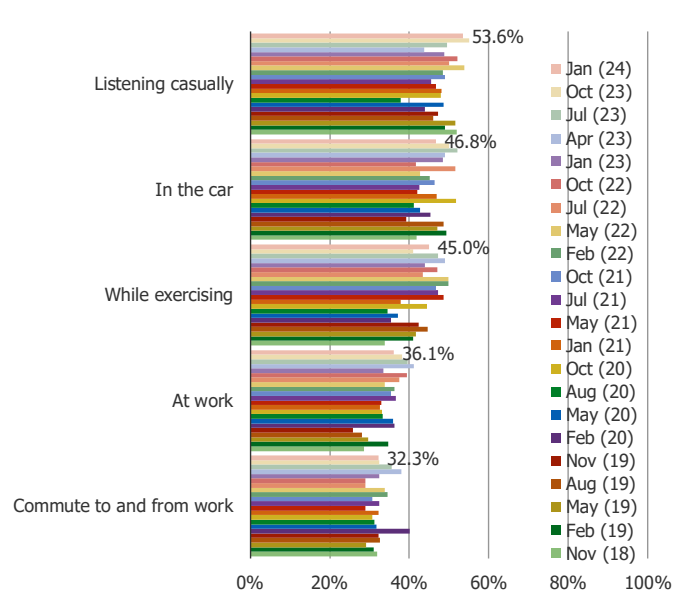
WHERE DO YOU TYPICALLY LISTEN TO THIS PLATFORM? (SELECT ALL THAT APPLY)

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

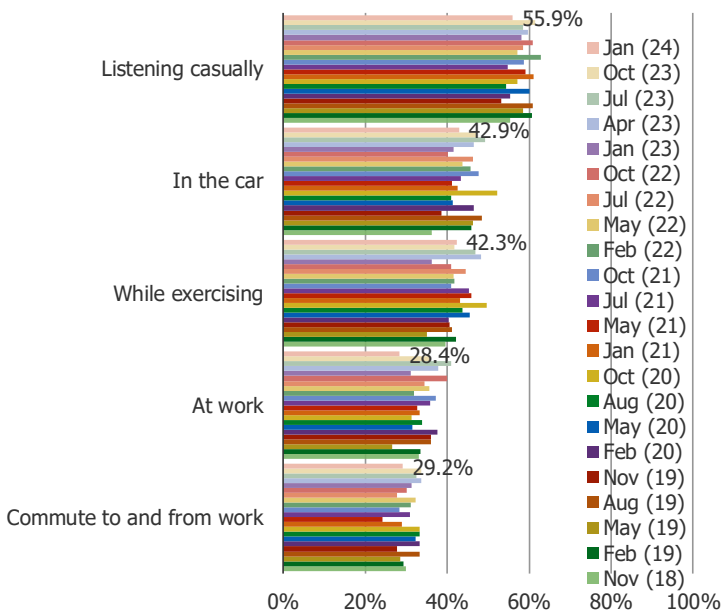
SIRIUS XM



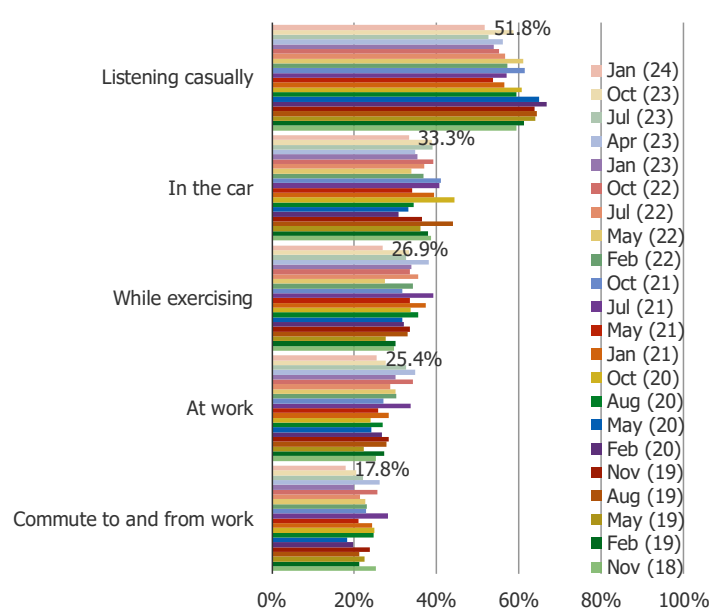
APPLE MUSIC



SPOTIFY

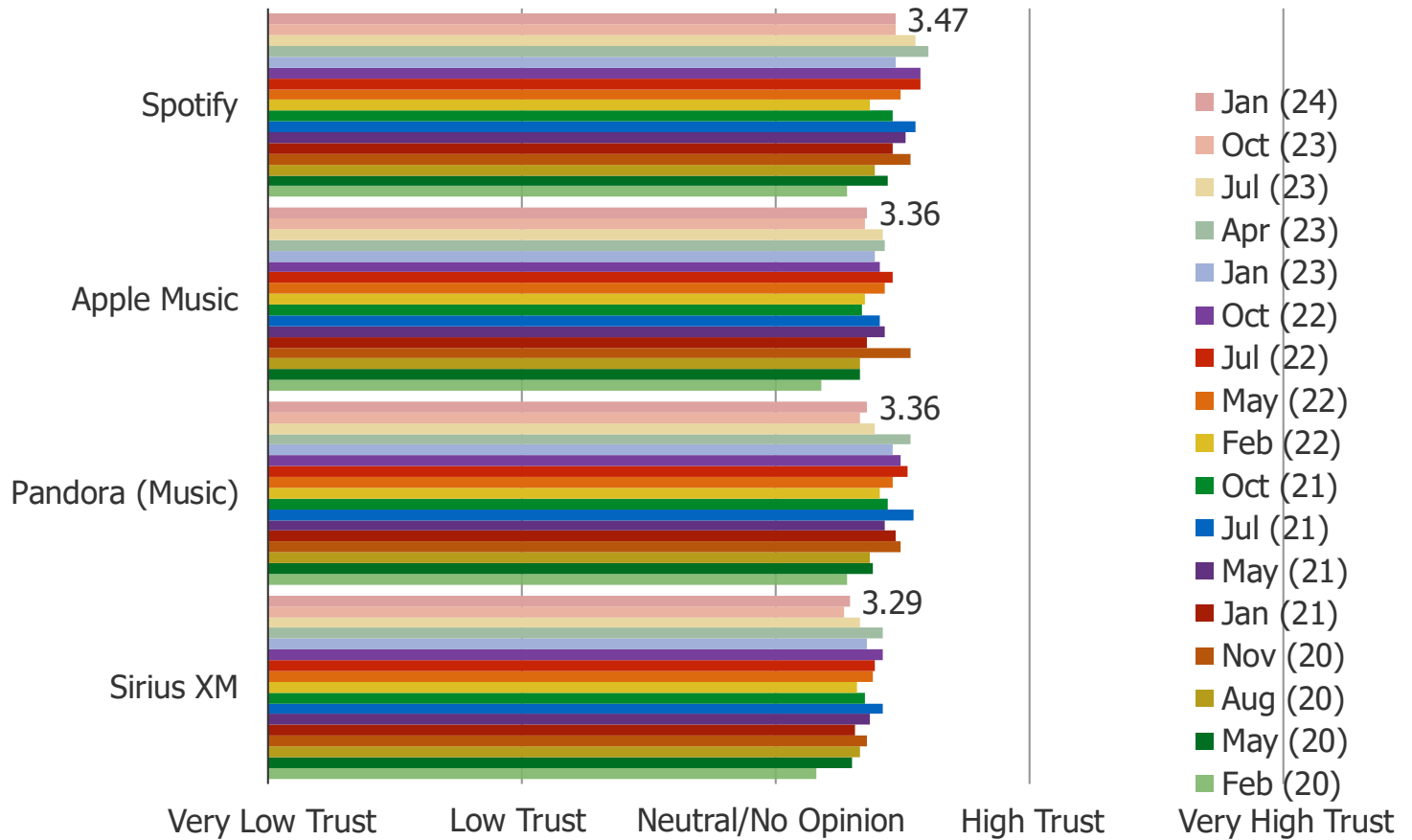


PANDORA



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

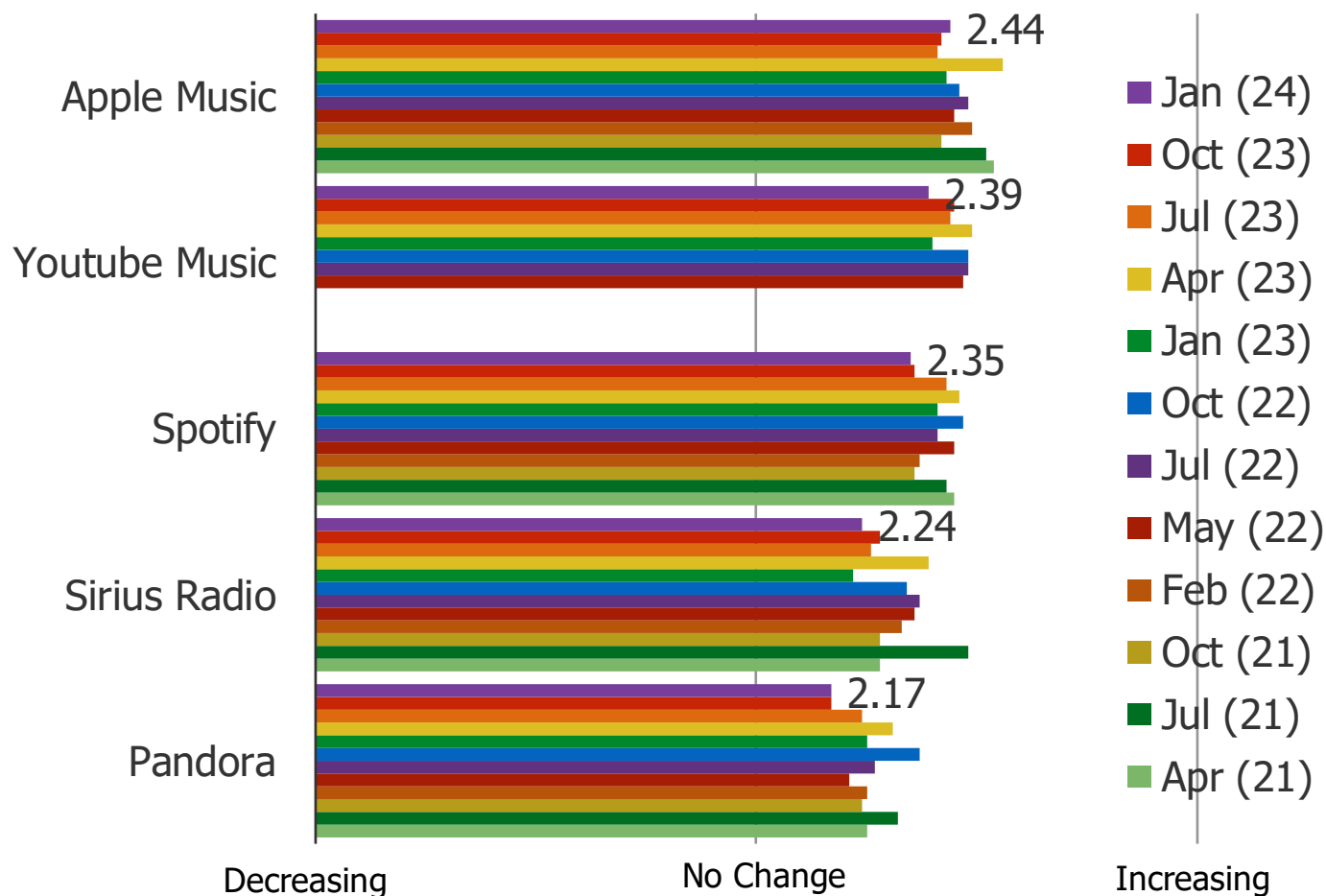
Posed to all respondents



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.

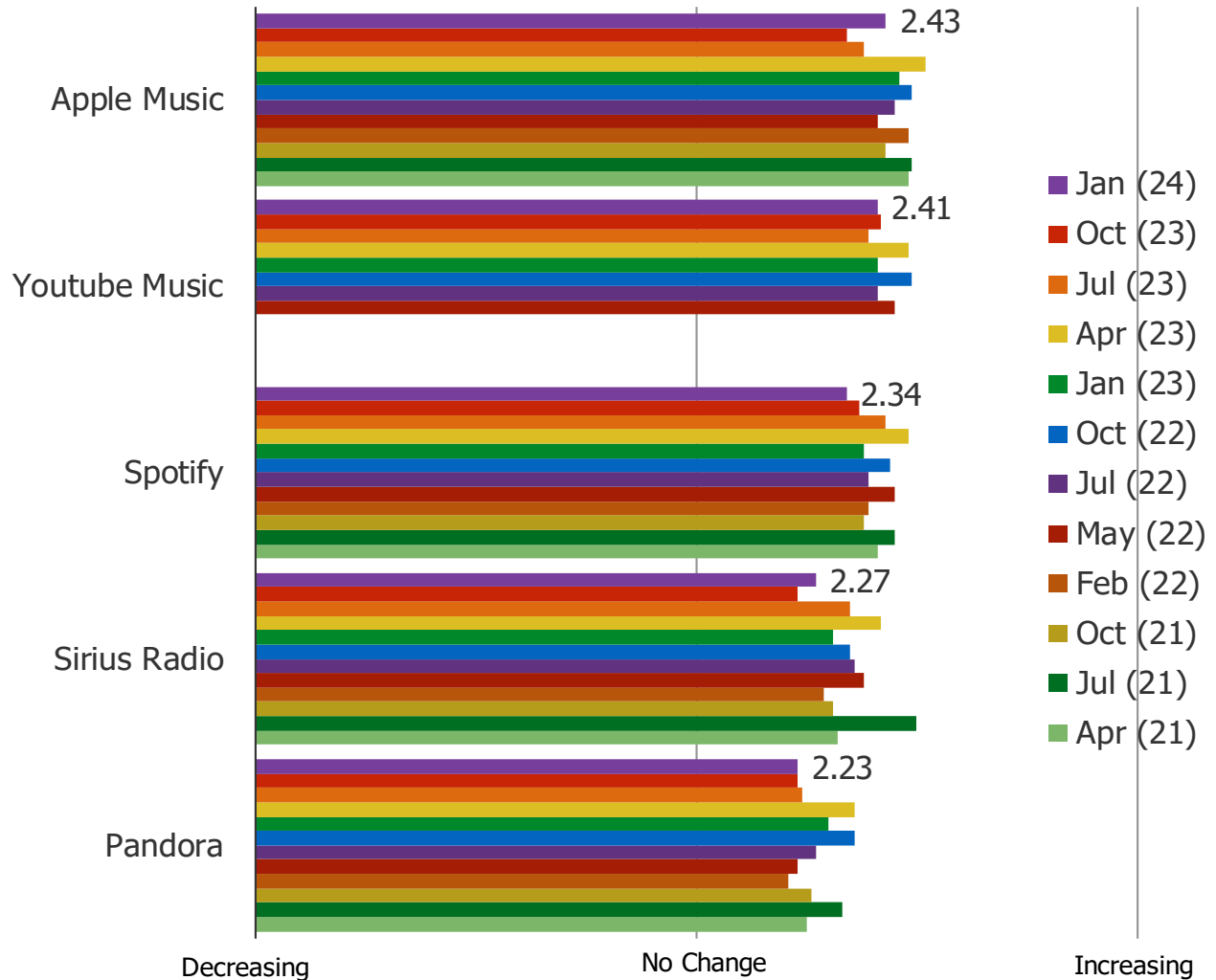
New Music (Released in the Past 6 Months)



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.

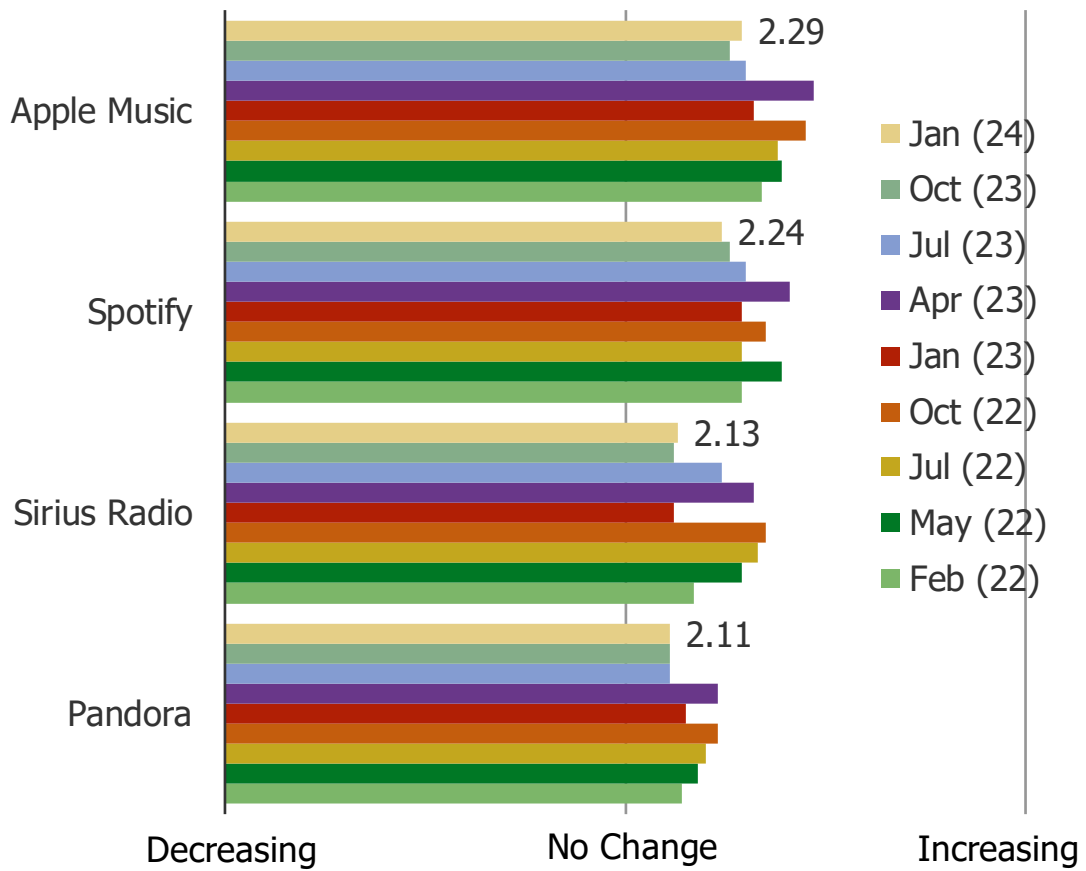
Catalog Music (Released 6+ Months Ago)



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

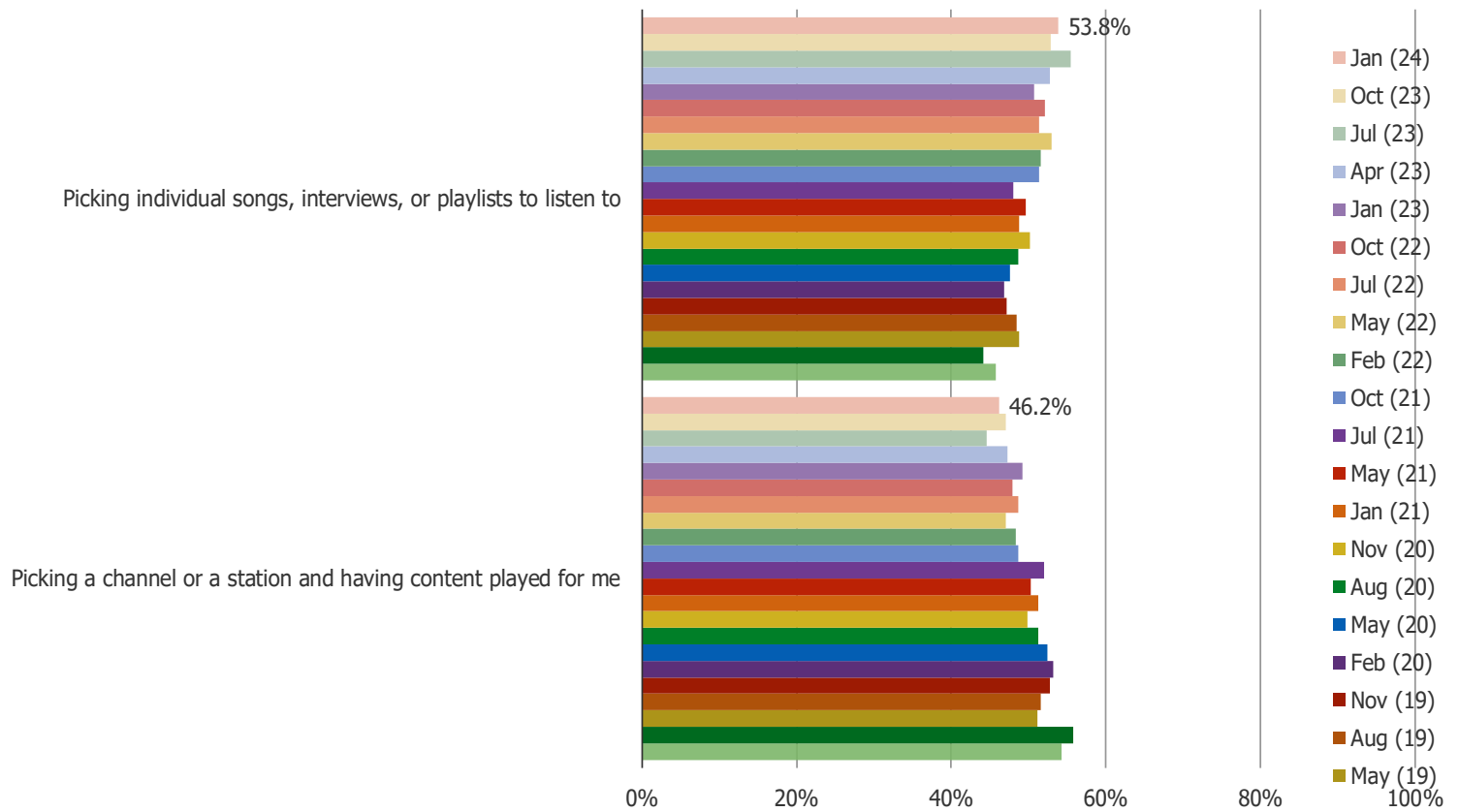
Posed to users of each platform.

Podcasts



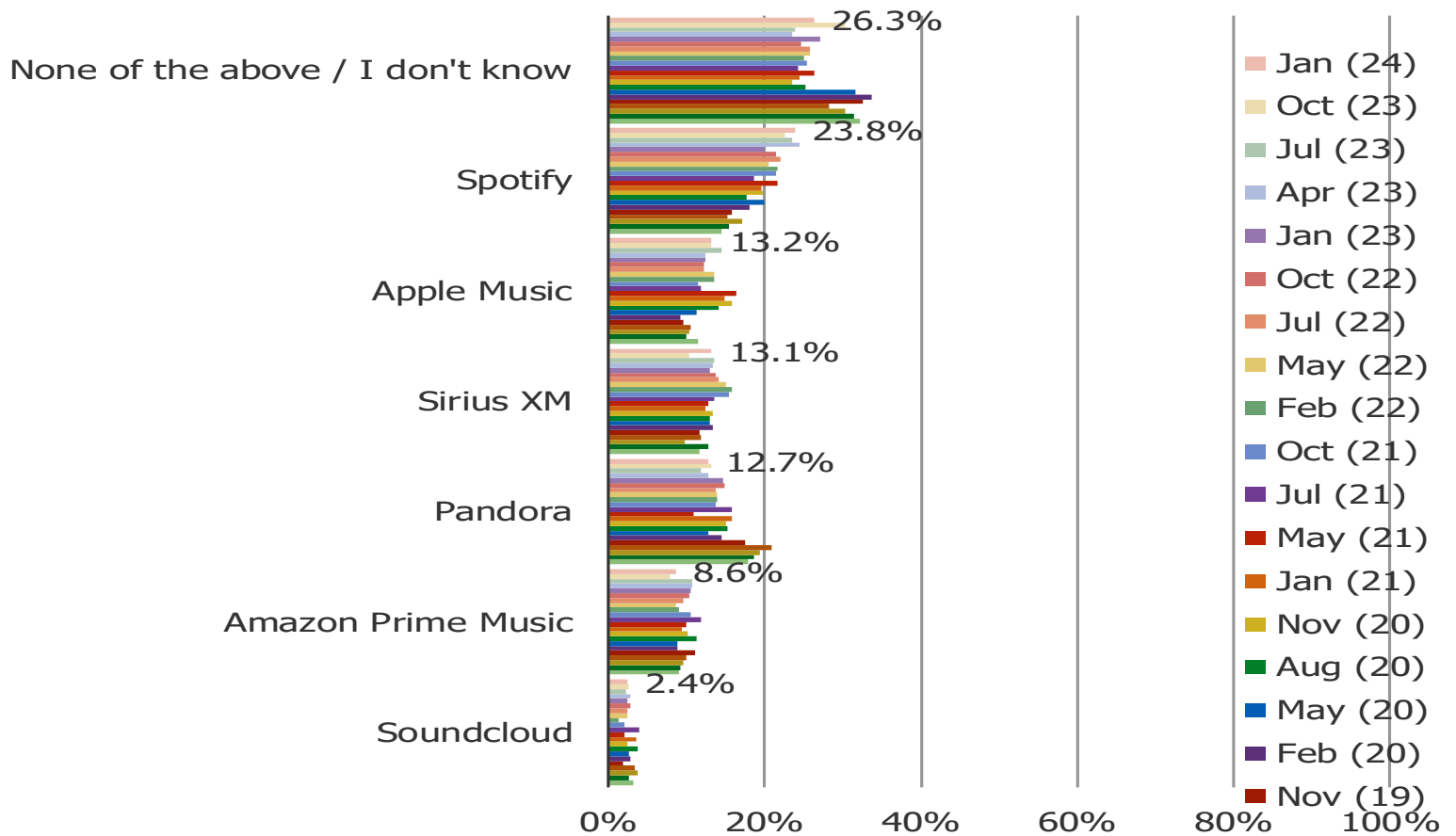
FOR LISTENING TO MUSIC AND TALK-SHOW CONTENT, WHICH IS BETTER?

Posed to all respondents.



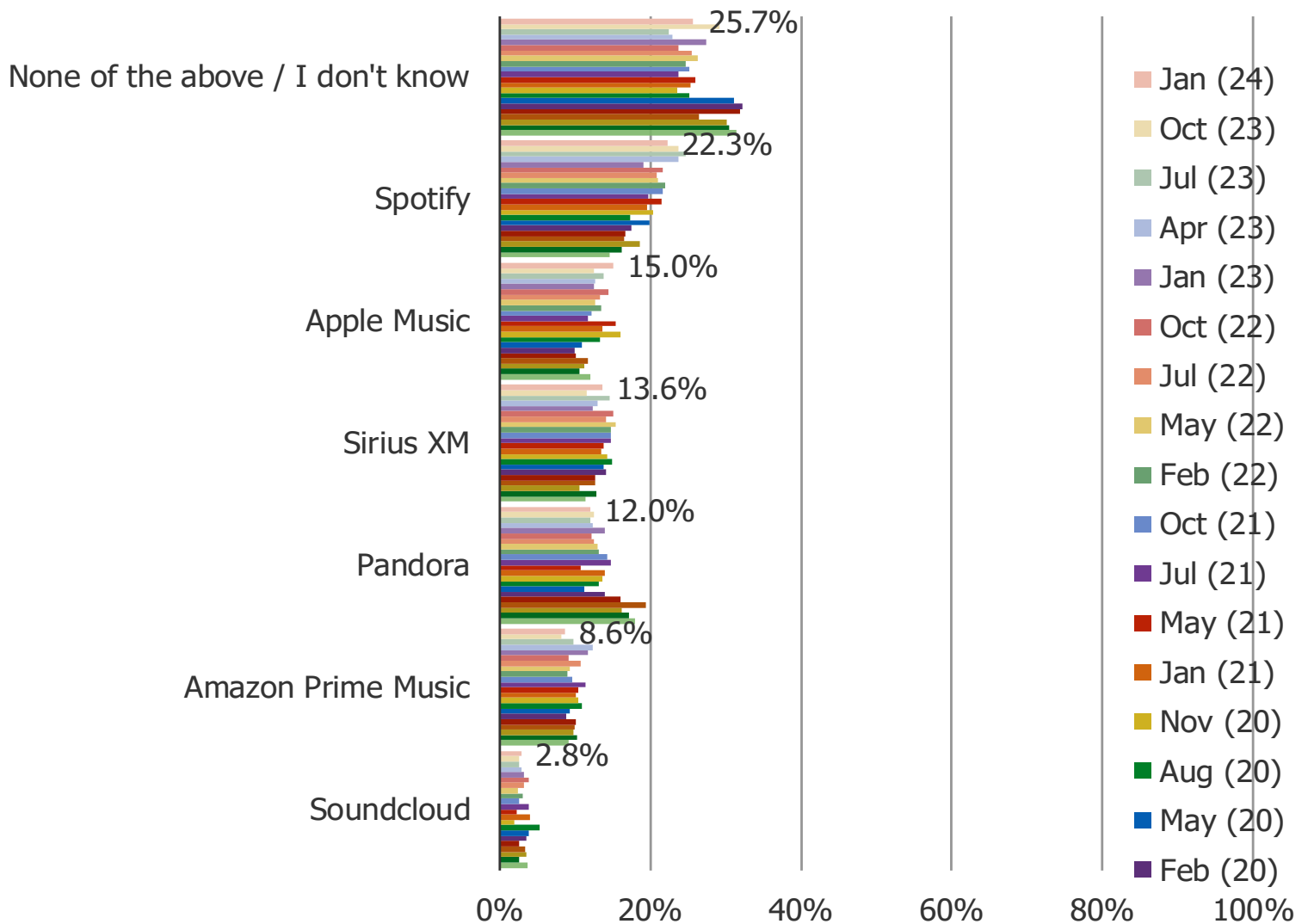
IN YOUR OPINION, WHICH PLATFORM IS BEST WHEN IT COMES TO THE WAY IN WHICH THEY DELIVER CONTENT TO ITS USERS? (IE. THE BEST USER EXPERIENCE)

Posed to all respondents.



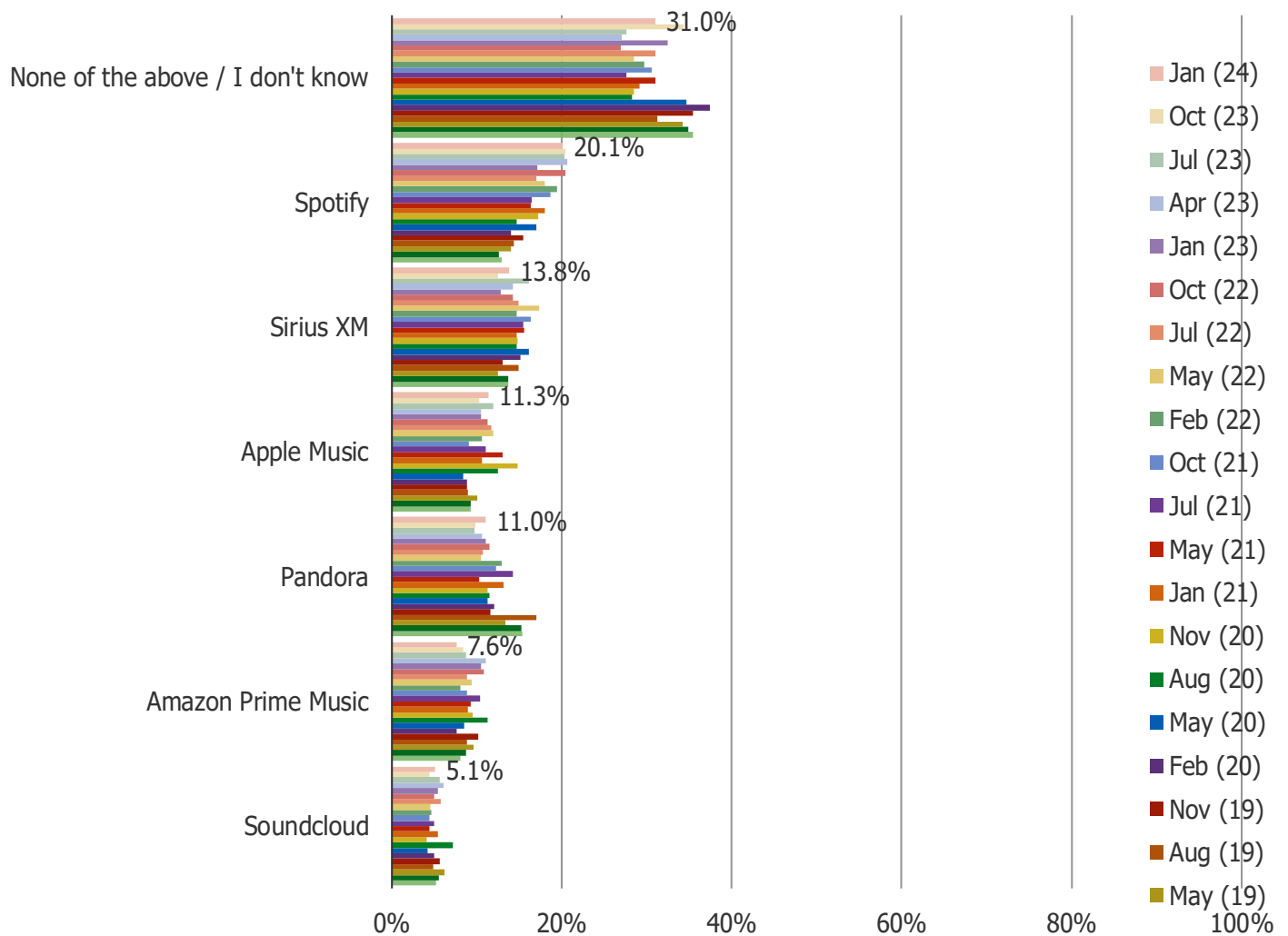
IN YOUR OPINION, WHICH PLATFORM HAS THE BEST CONTENT AVAILABLE?

Posed to all respondents.



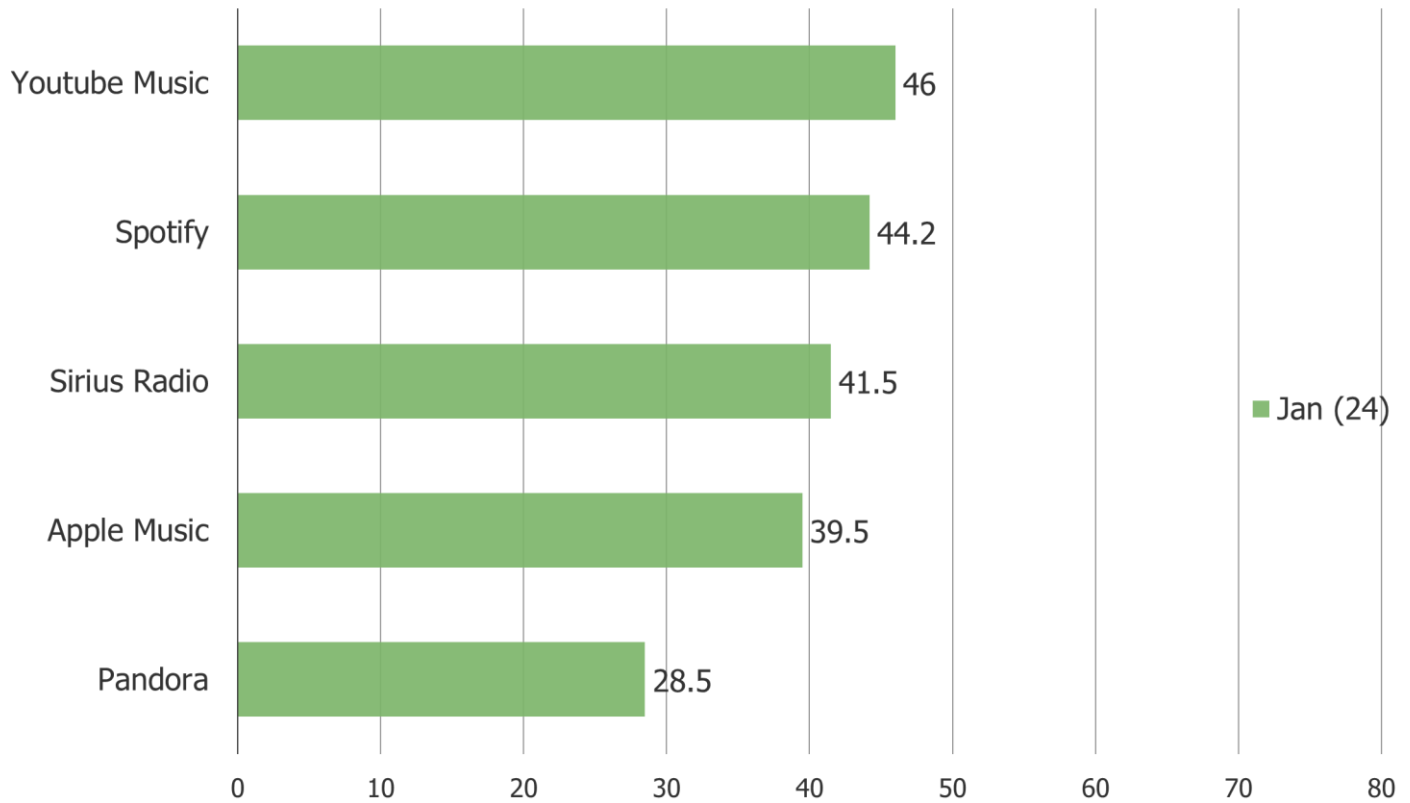
IN YOUR OPINION, WHICH PLATFORM HAS THE MOST UNIQUE CONTENT AVAILABLE THAT YOU CAN'T FIND ANYWHERE ELSE?

Posed to all respondents.



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

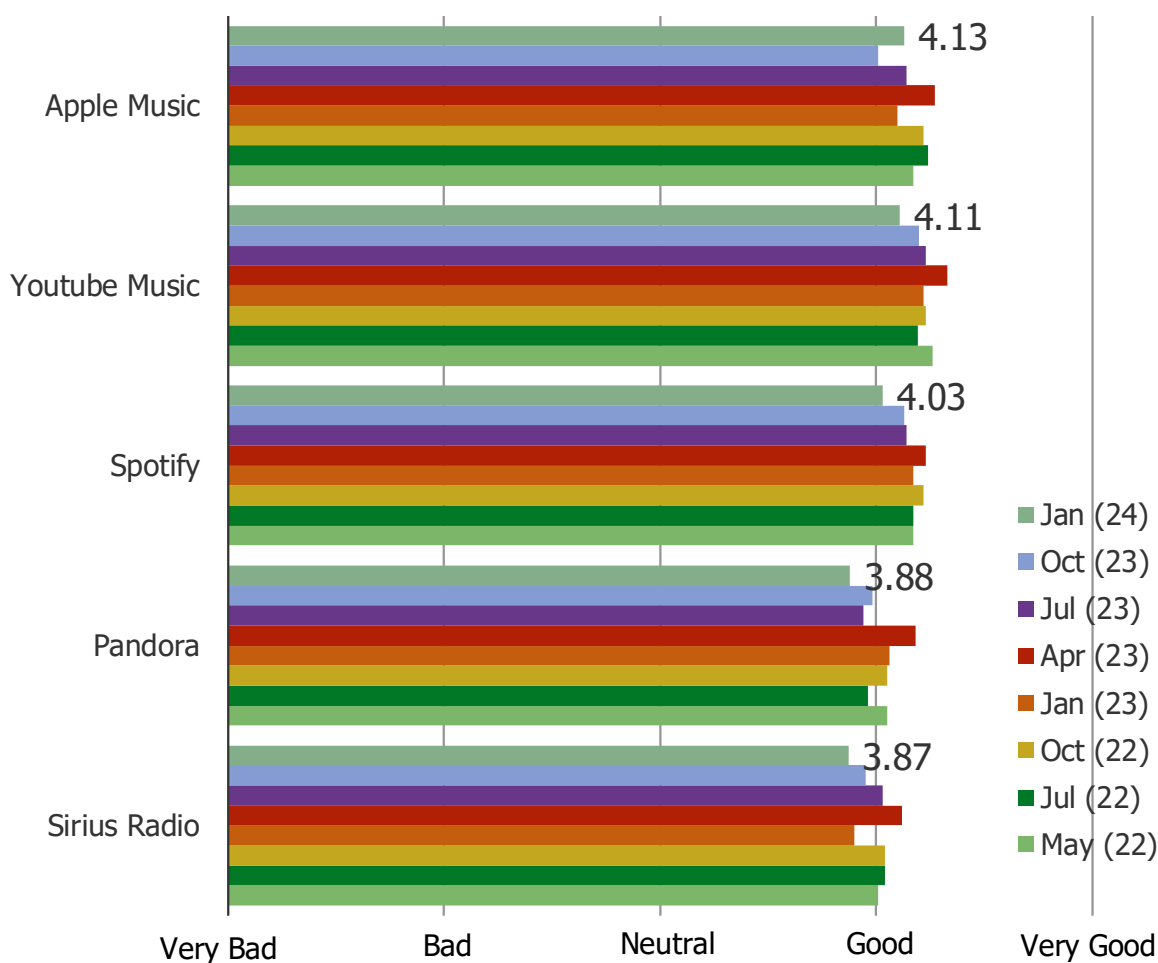
Posed to respondents who have an account with each of the following (combining all responses from 2023 to achieve larger N sizes).



	N=
Sirius Radio	1347
Apple Music	1983
Spotify	2886
Pandora	2253
Youtube Music	2467

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

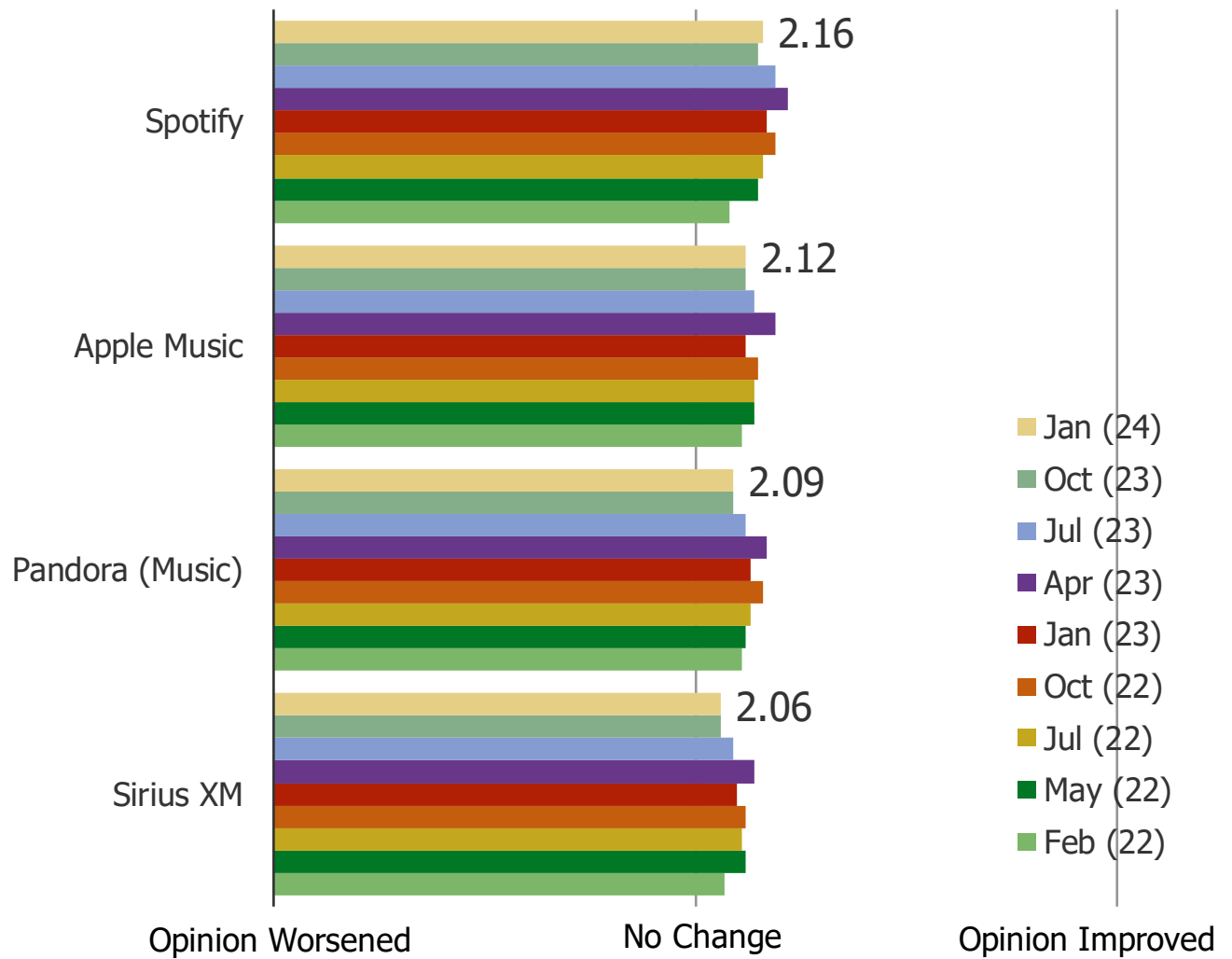
Posed to users of each of the following.



	N=
Sirius Radio	223
Apple Music	338
Spotify	497
Pandora	342
Youtube Music	394

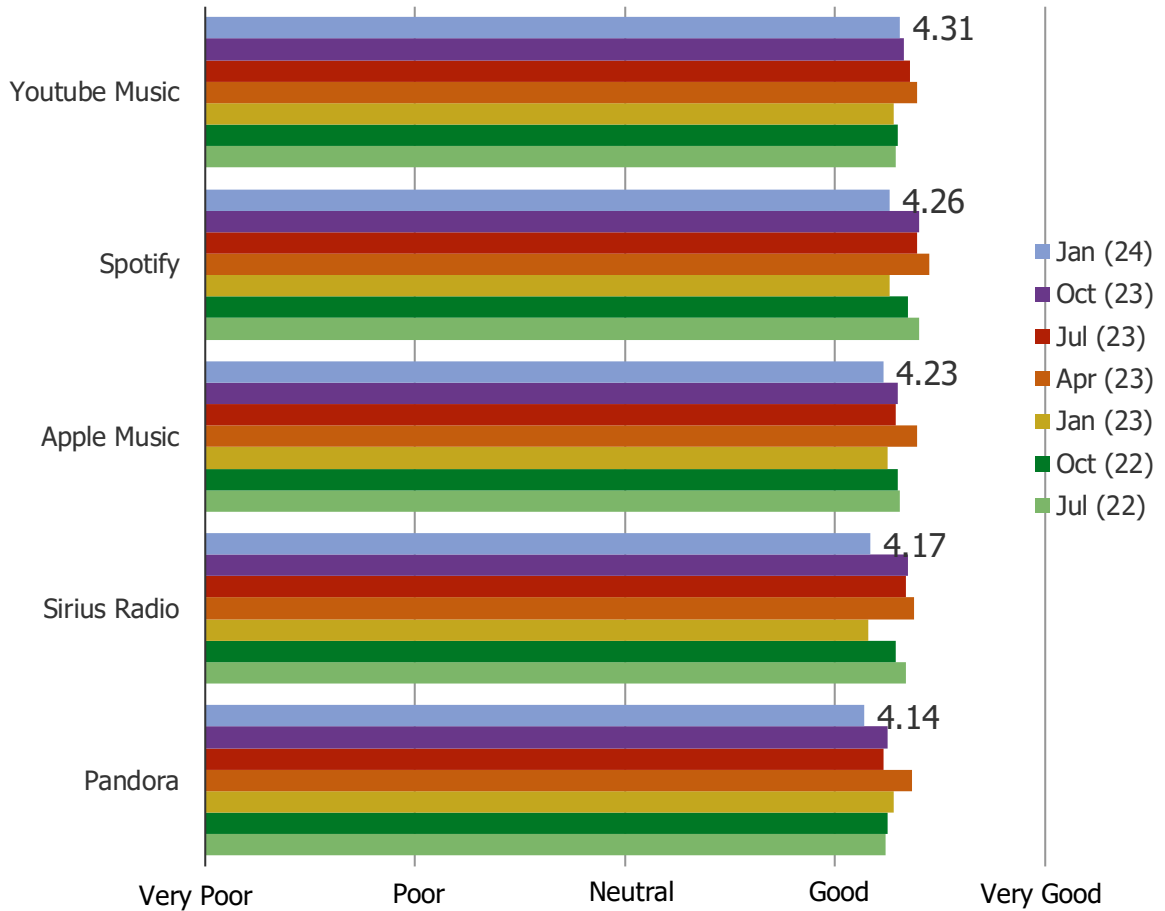
HAS YOUR OPINION OF ANY OF THE FOLLOWING CHANGED RECENTLY?

Posed to all respondents.



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

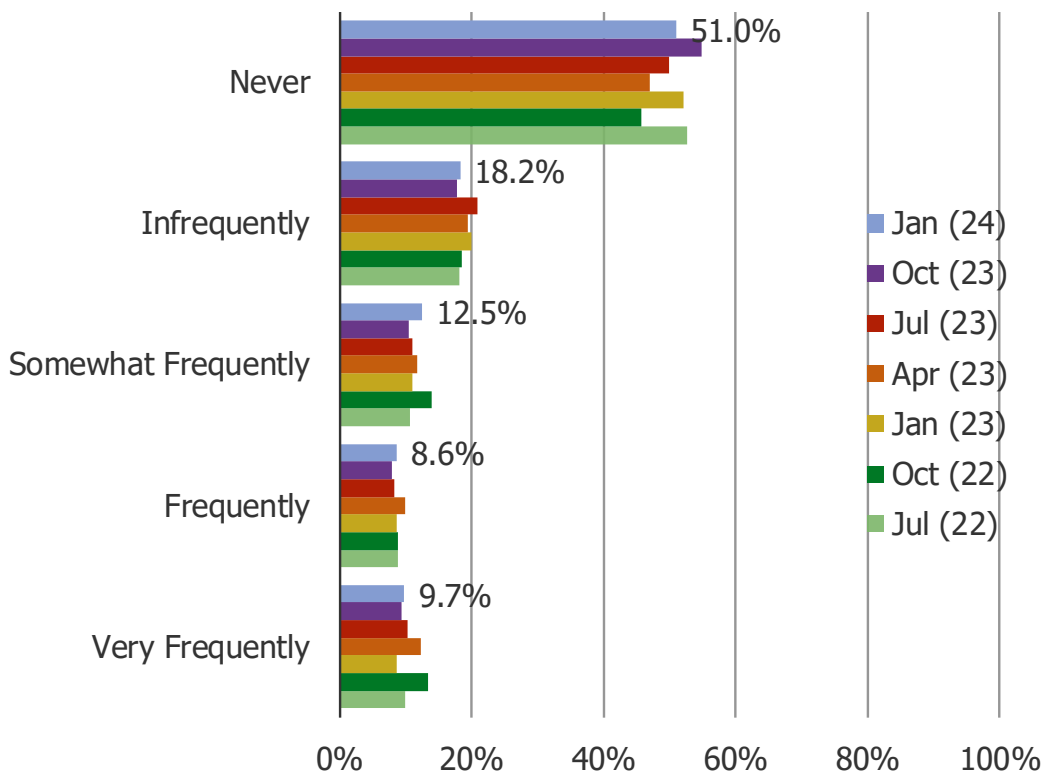
Posed to users of each of the following.



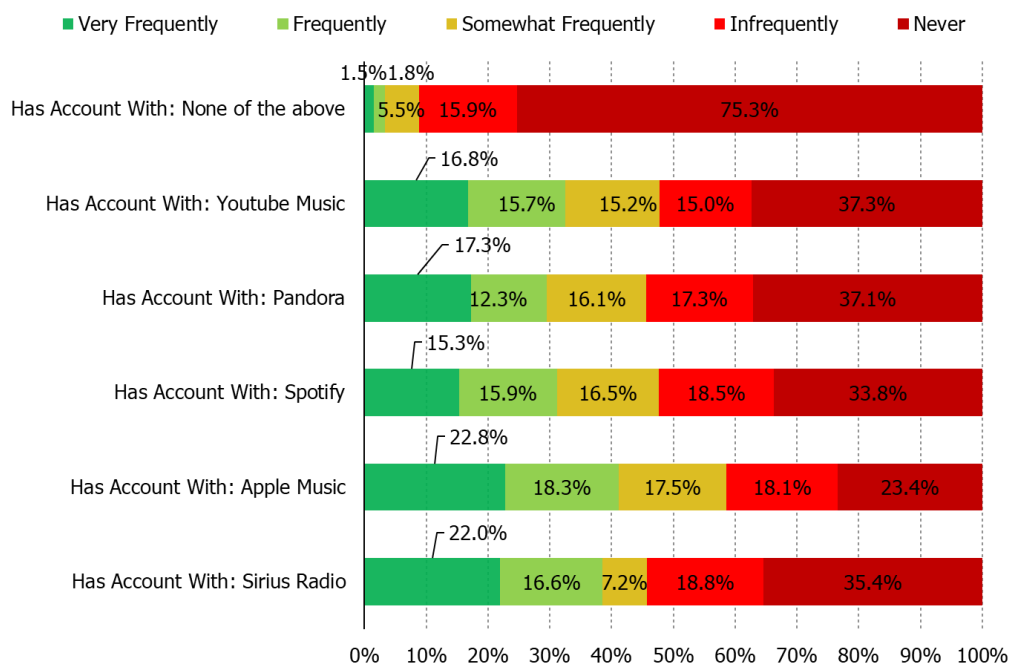
	N=
Sirius Radio	223
Apple Music	338
Spotify	497
Pandora	342
Youtube Music	394

HOW OFTEN DO YOU LISTEN TO AUDIOBOOKS?

Posed to all respondents.



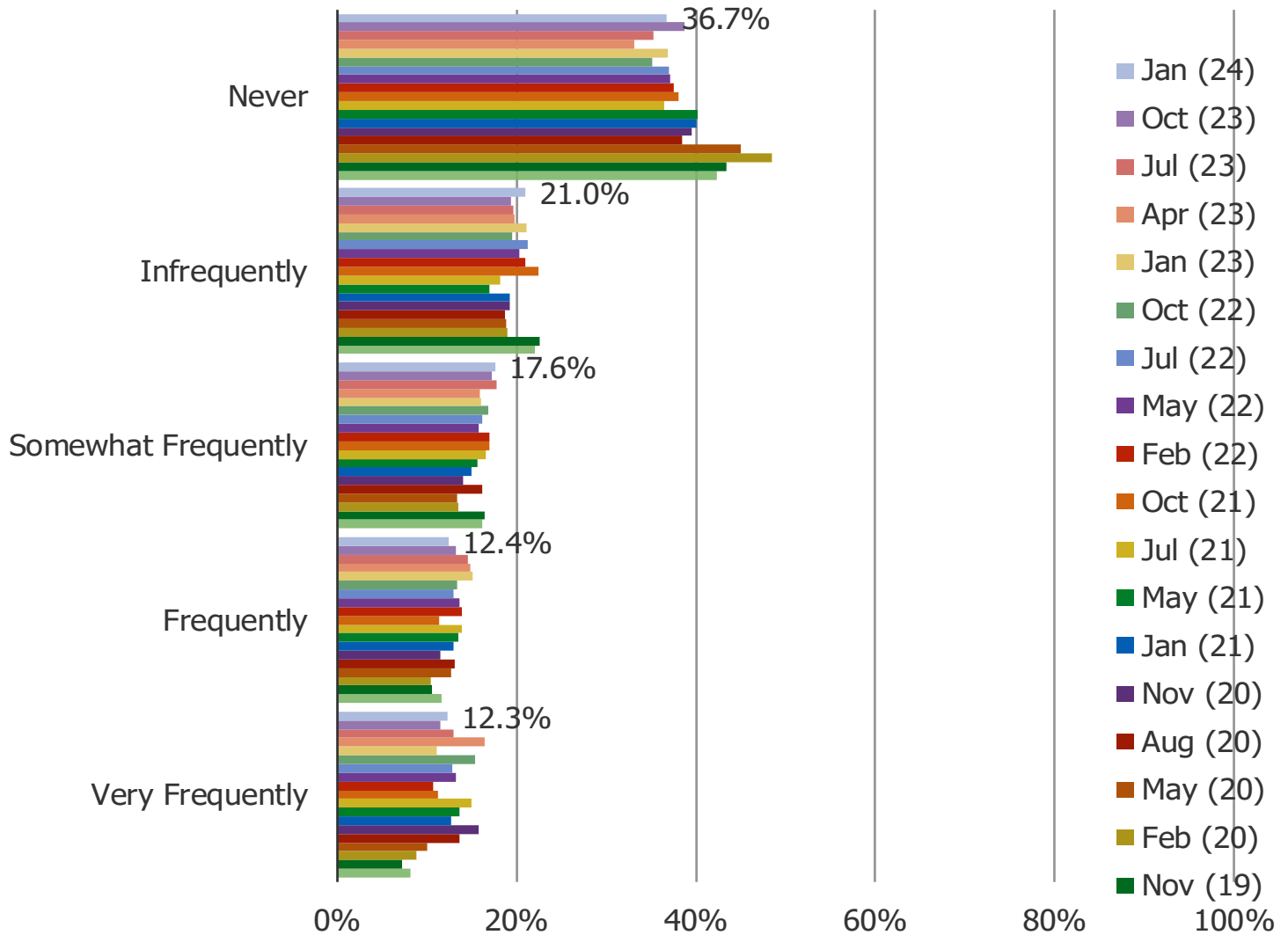
Cross-Tab Analysis: How often users of the following listen to audiobooks in general



PODCASTS

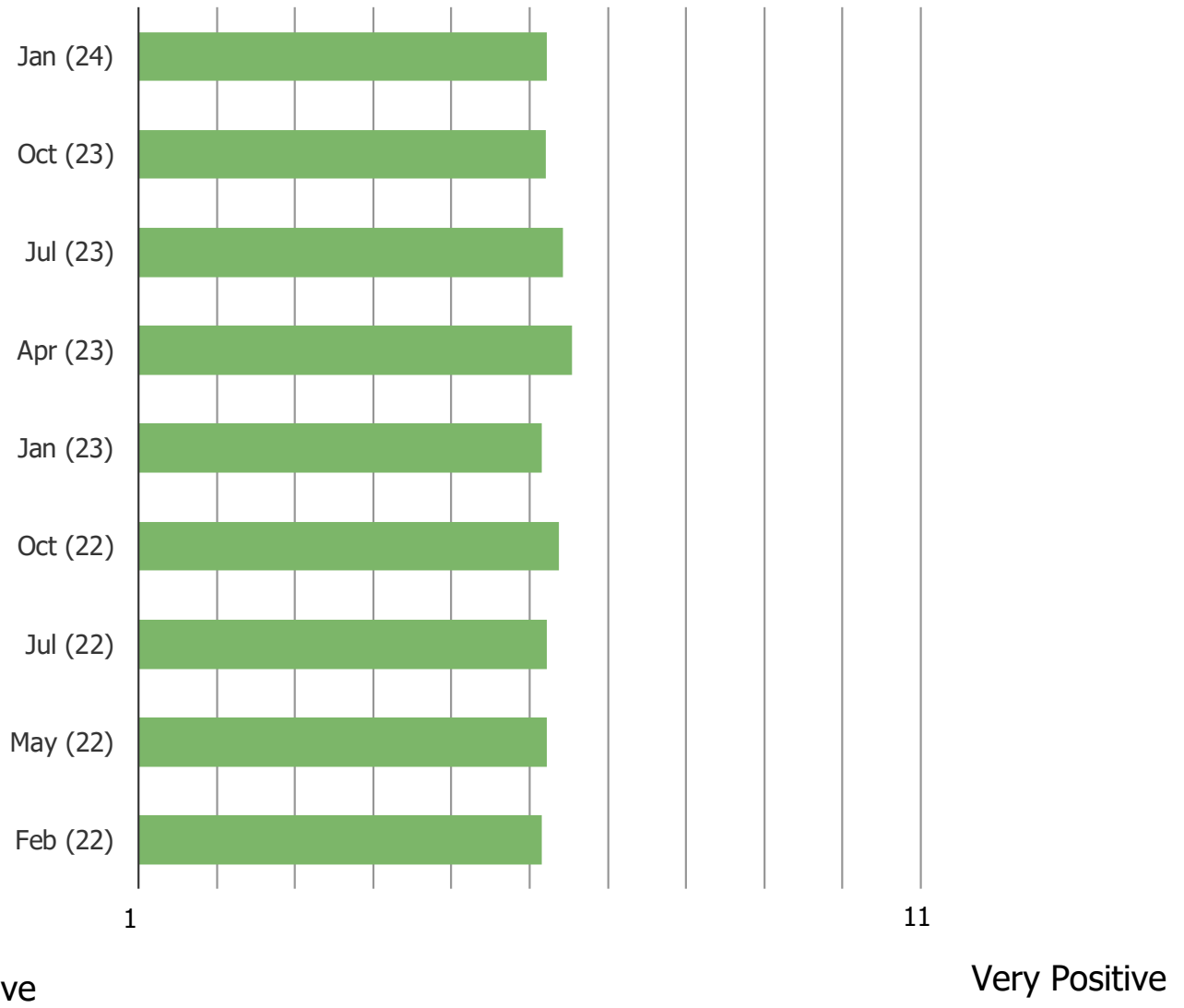
HOW OFTEN DO YOU LISTEN TO PODCASTS?

Posed to all respondents.



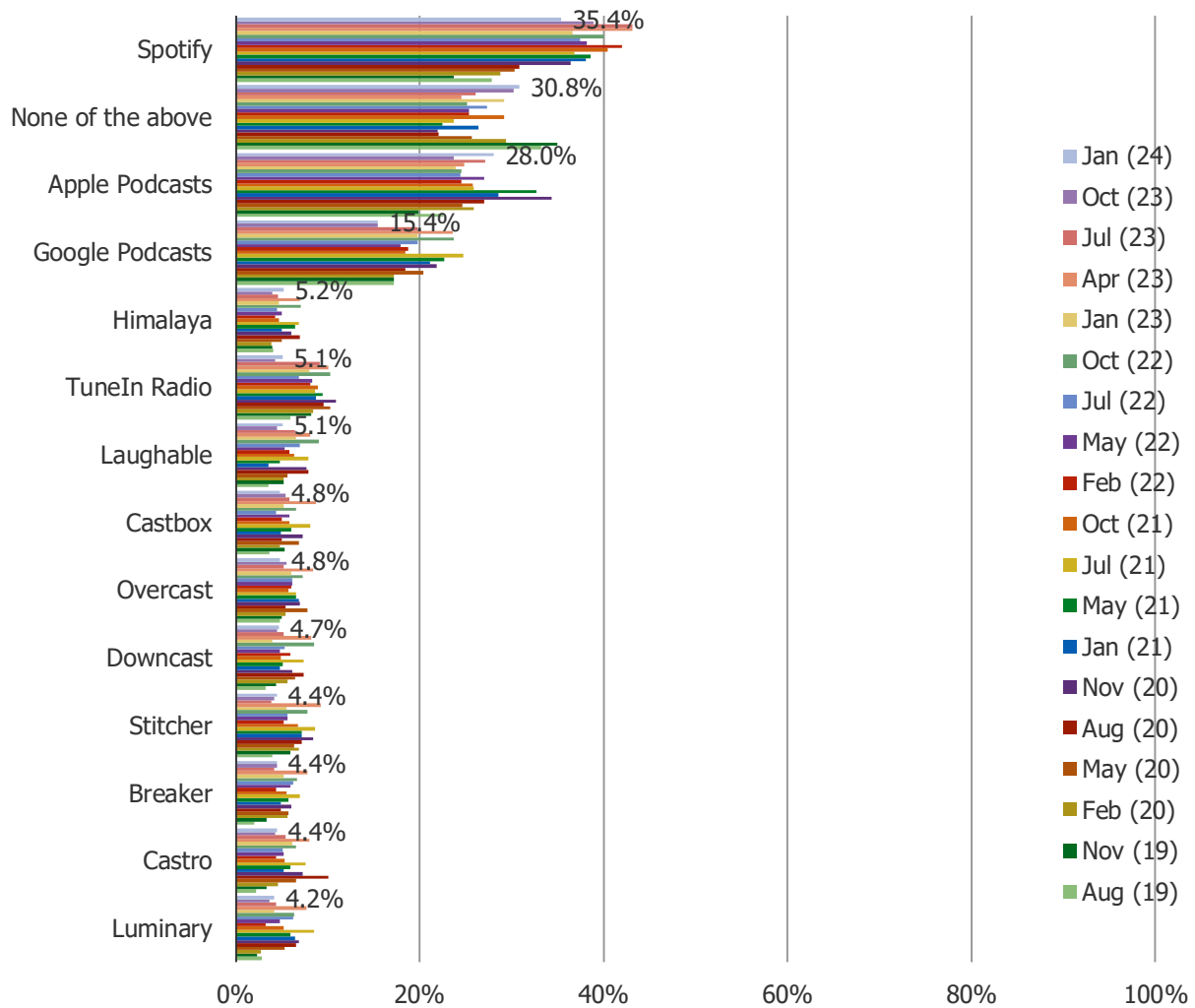
WHAT IS YOUR OPINION OF JOE ROGAN?

Posed to all respondents.



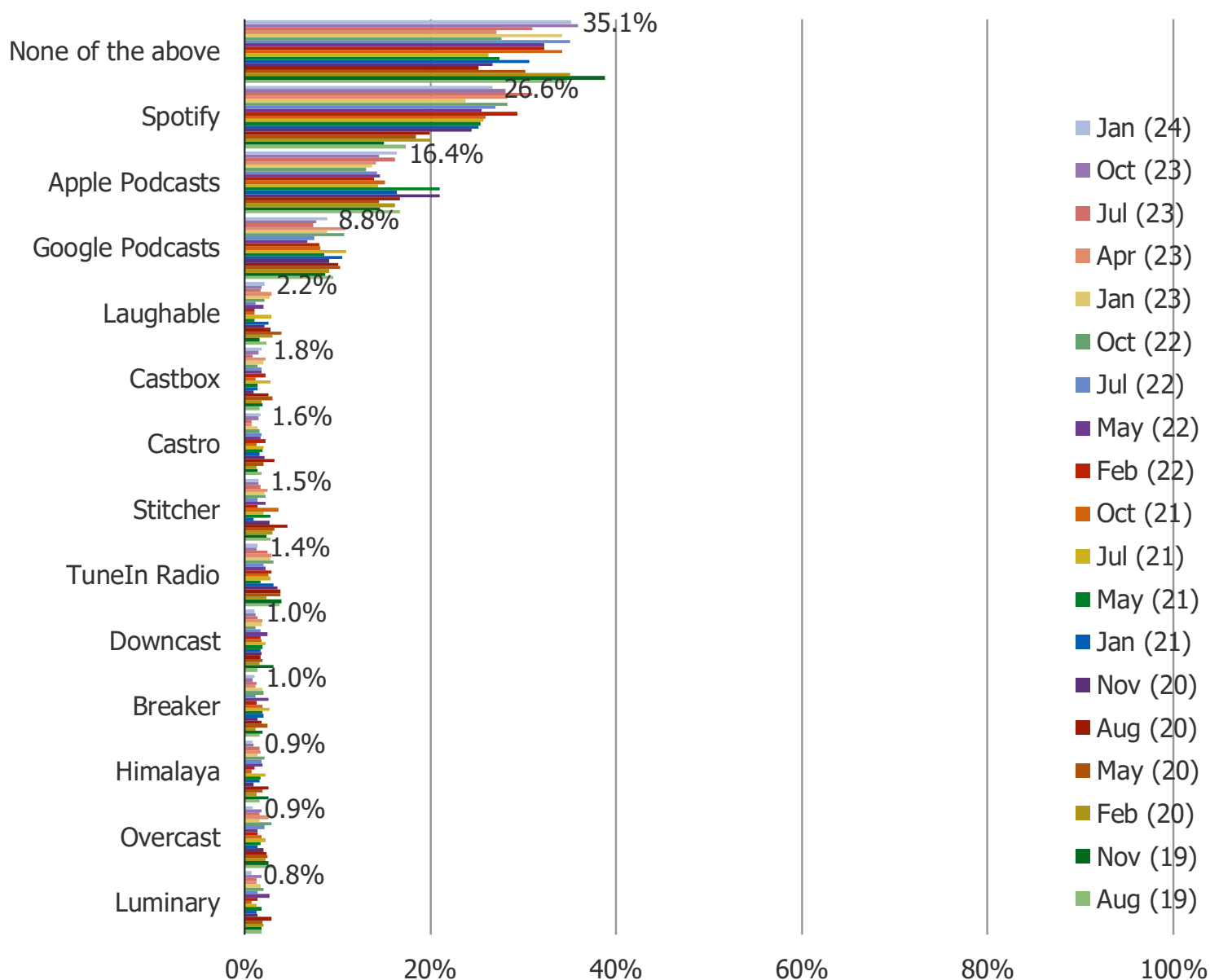
WHICH OF THE FOLLOWING PLATFORMS DO YOU USE TO LISTEN TO PODCASTS?

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



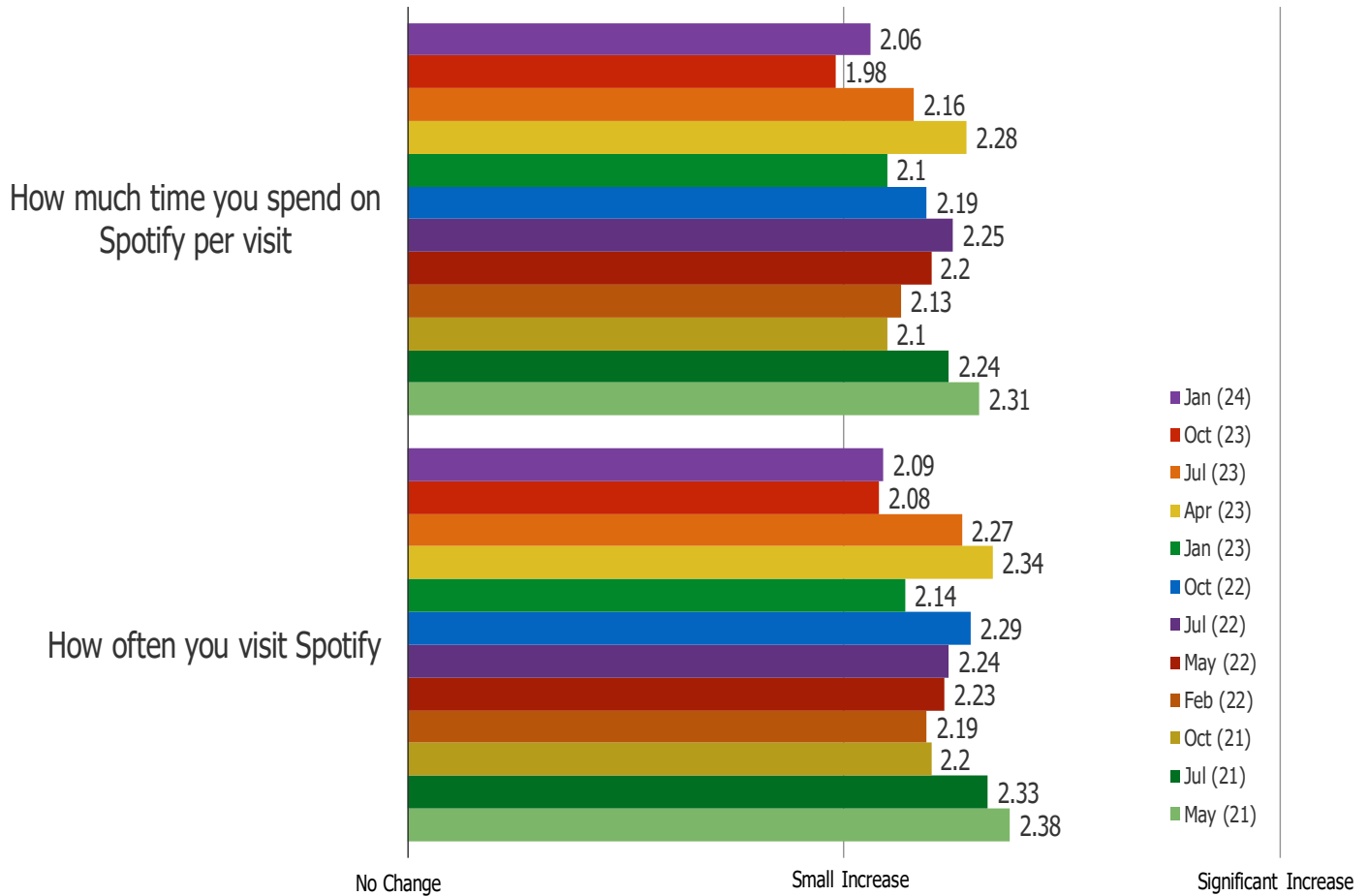
WHICH OF THE FOLLOWING HAS THE MOST UNIQUE PODCAST CONTENT THAT YOU CANNOT FIND ON OTHER PLATFORMS?

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



SINCE THE JOE ROGAN EXPERIENCE BECAME AVAILABLE ON SPOTIFY IN SEPTEMBER OF 2020, HAVE YOU CHANGED...

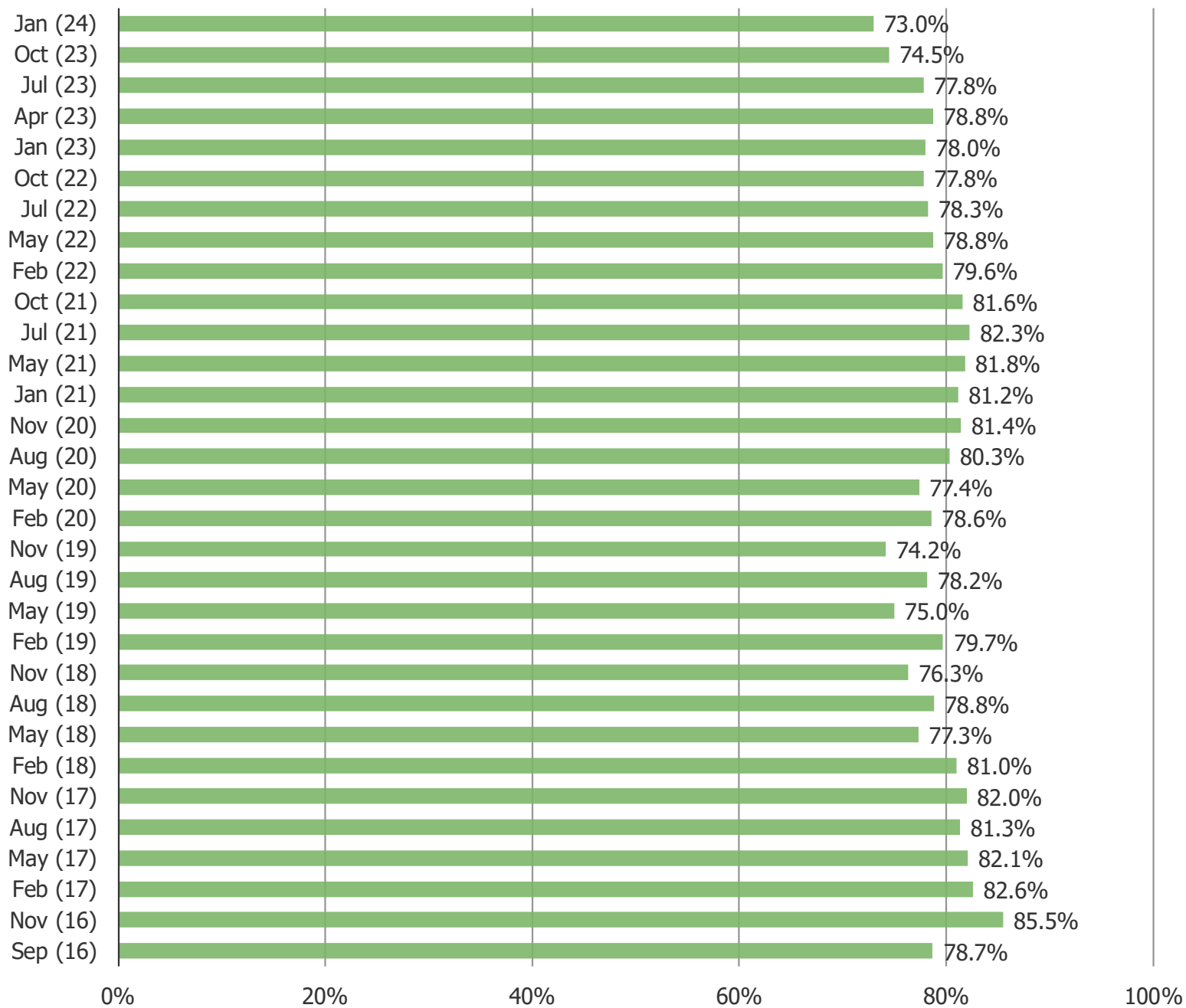
Posed to respondents who listen to Joe Rogan at least somewhat frequently



CONNECTED CAR

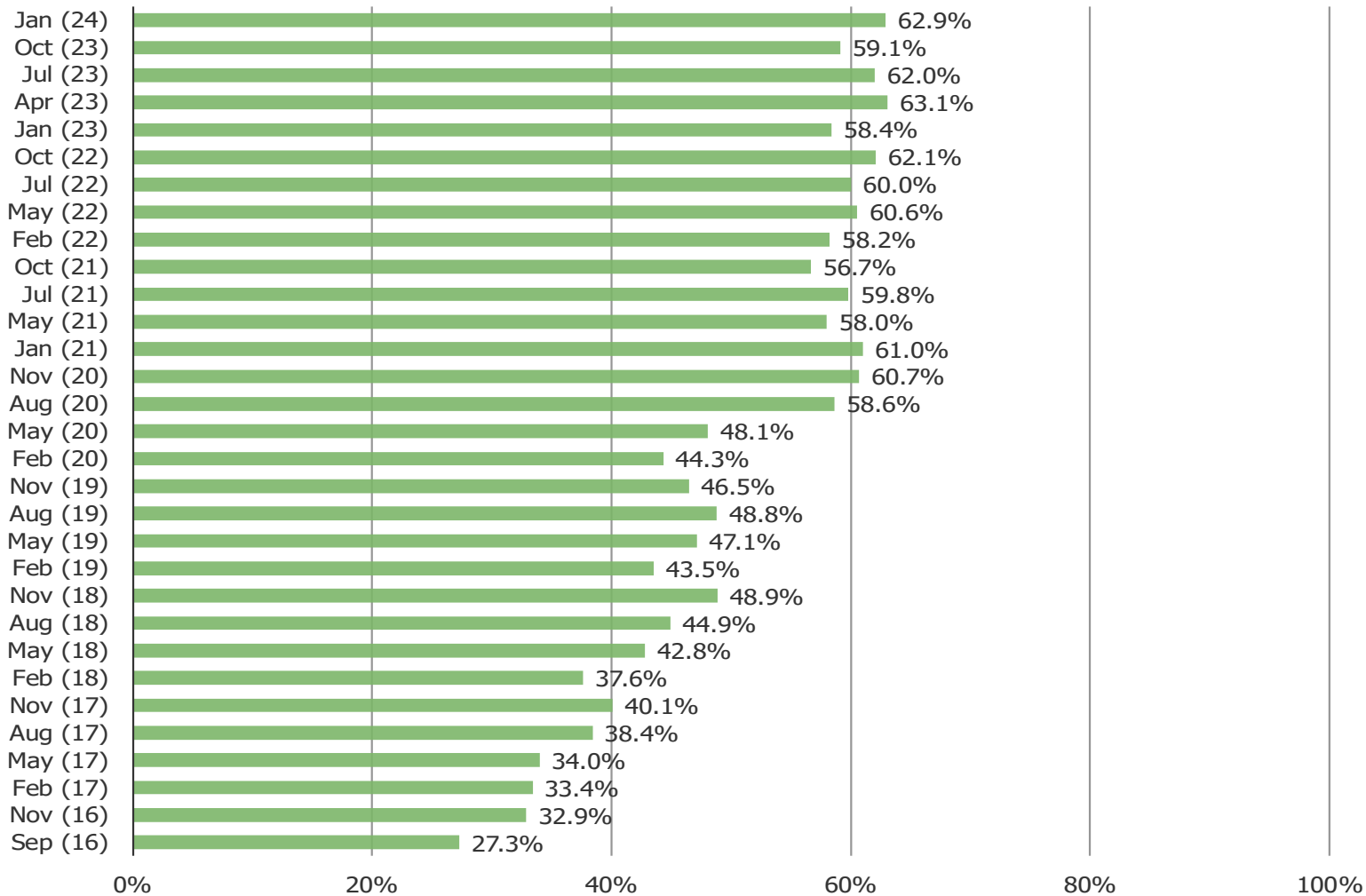
OWNS OR LEASES A CAR

Posed to all respondents



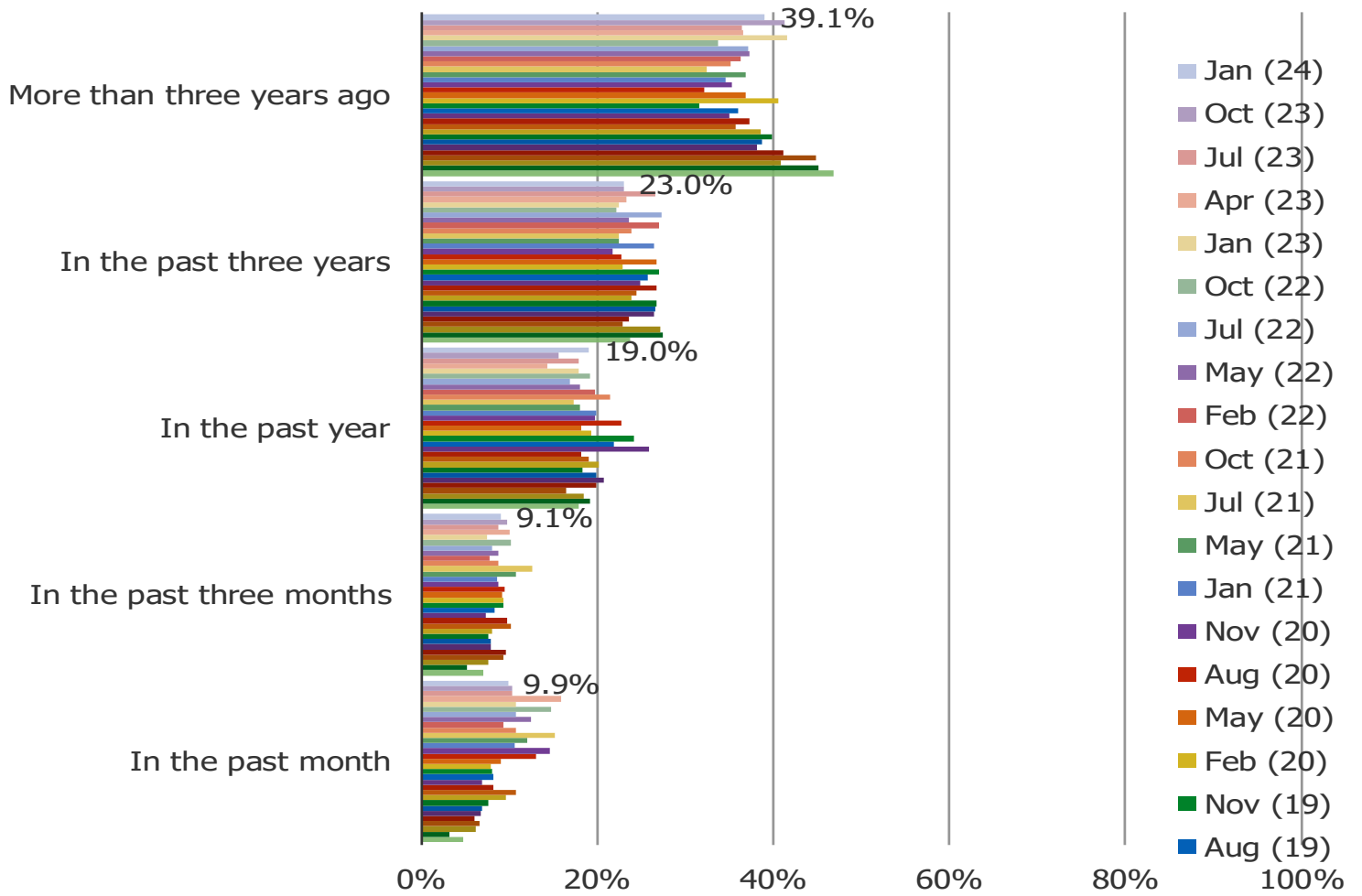
DO YOU EVER CONNECT A SMARTPHONE TO LISTEN TO MUSIC APPS IN YOUR CAR LIKE SPOTIFY, PANDORA, APPLE MUSIC, ETC?

Posed to all respondents who own / lease a car



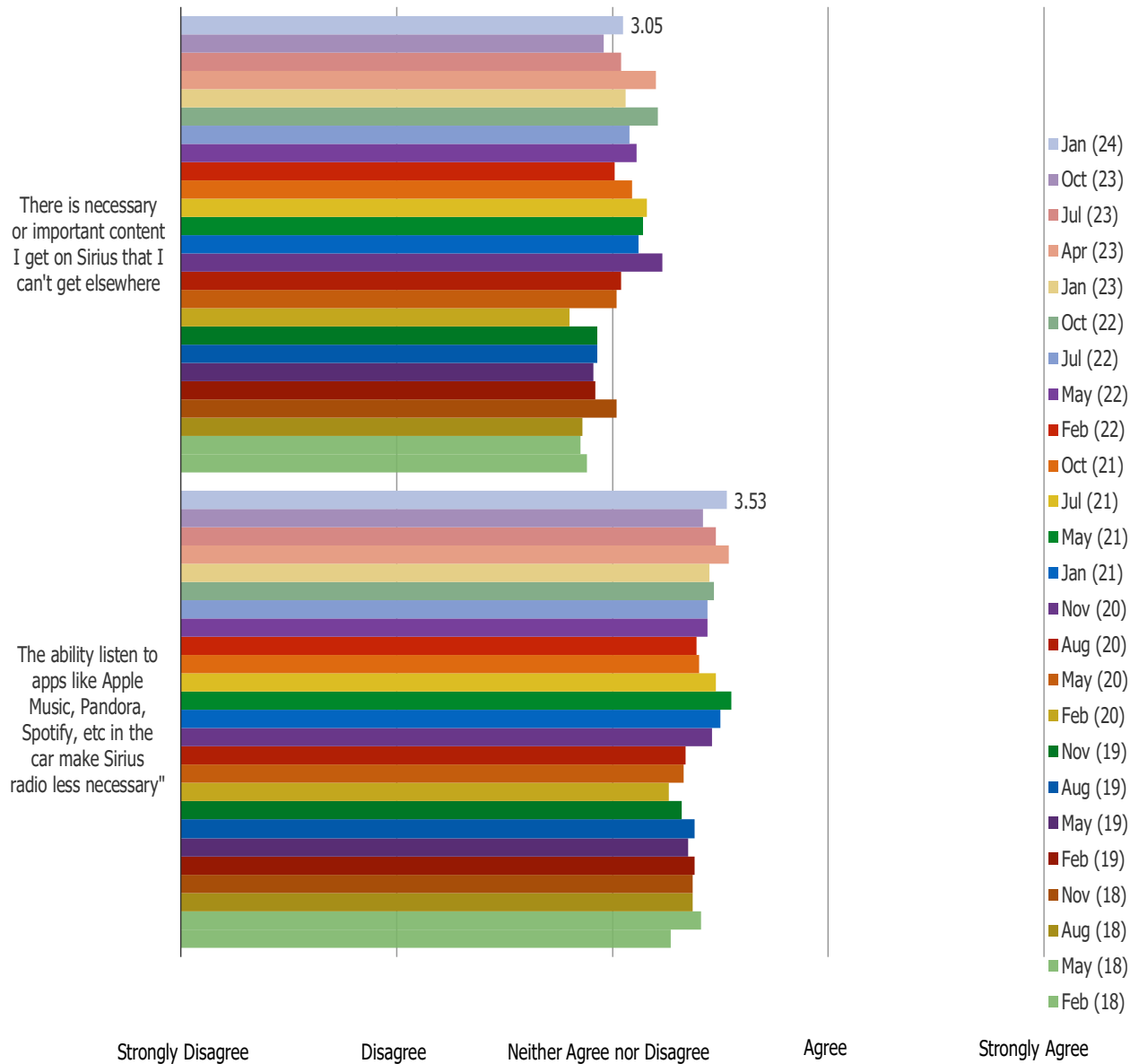
WHEN IS THE LAST TIME YOU PURCHASED OR LEASED A CAR?

Posed to all respondents who own / lease a car



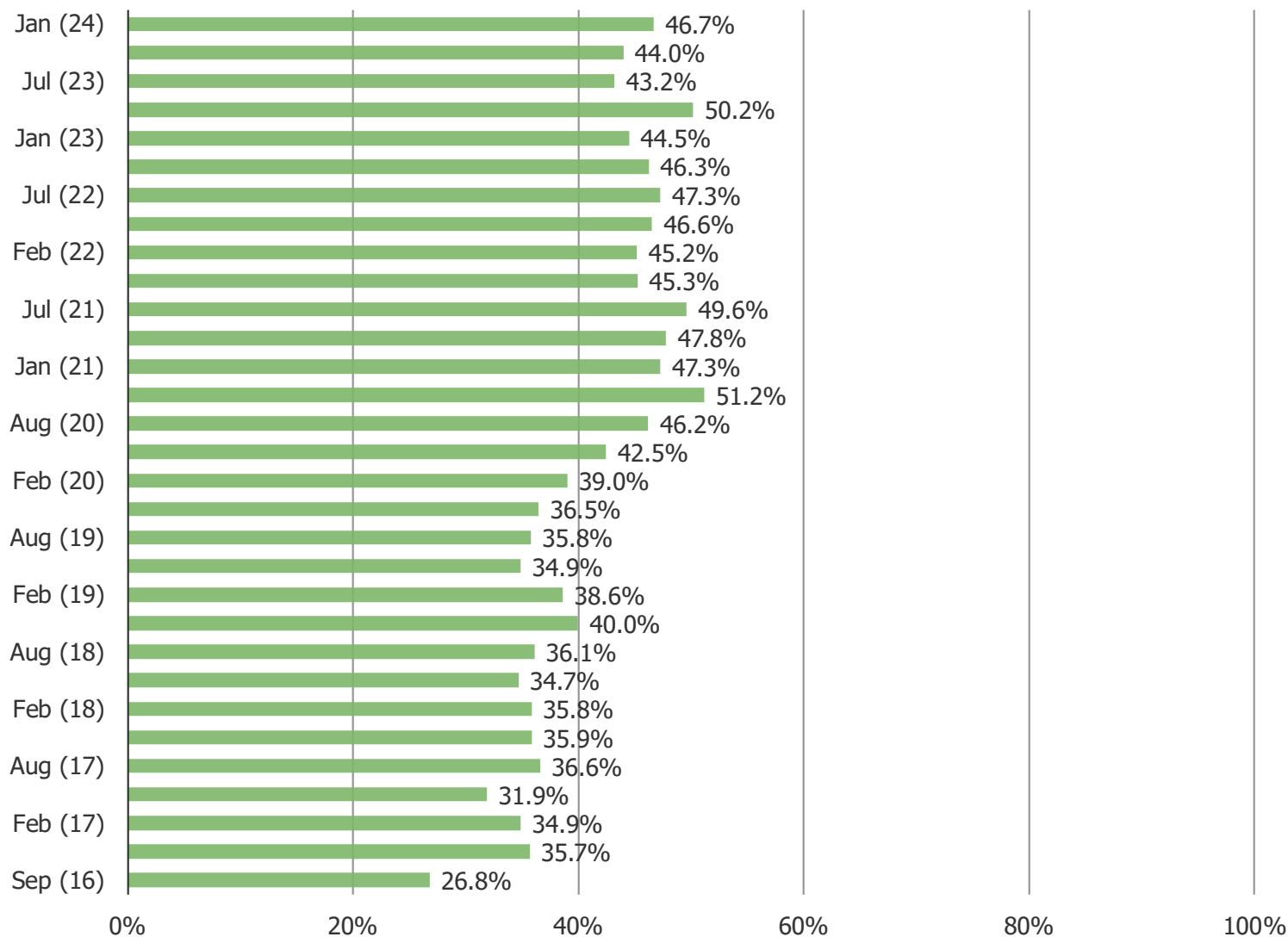
HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS:

Posed to all respondents who own / lease a car



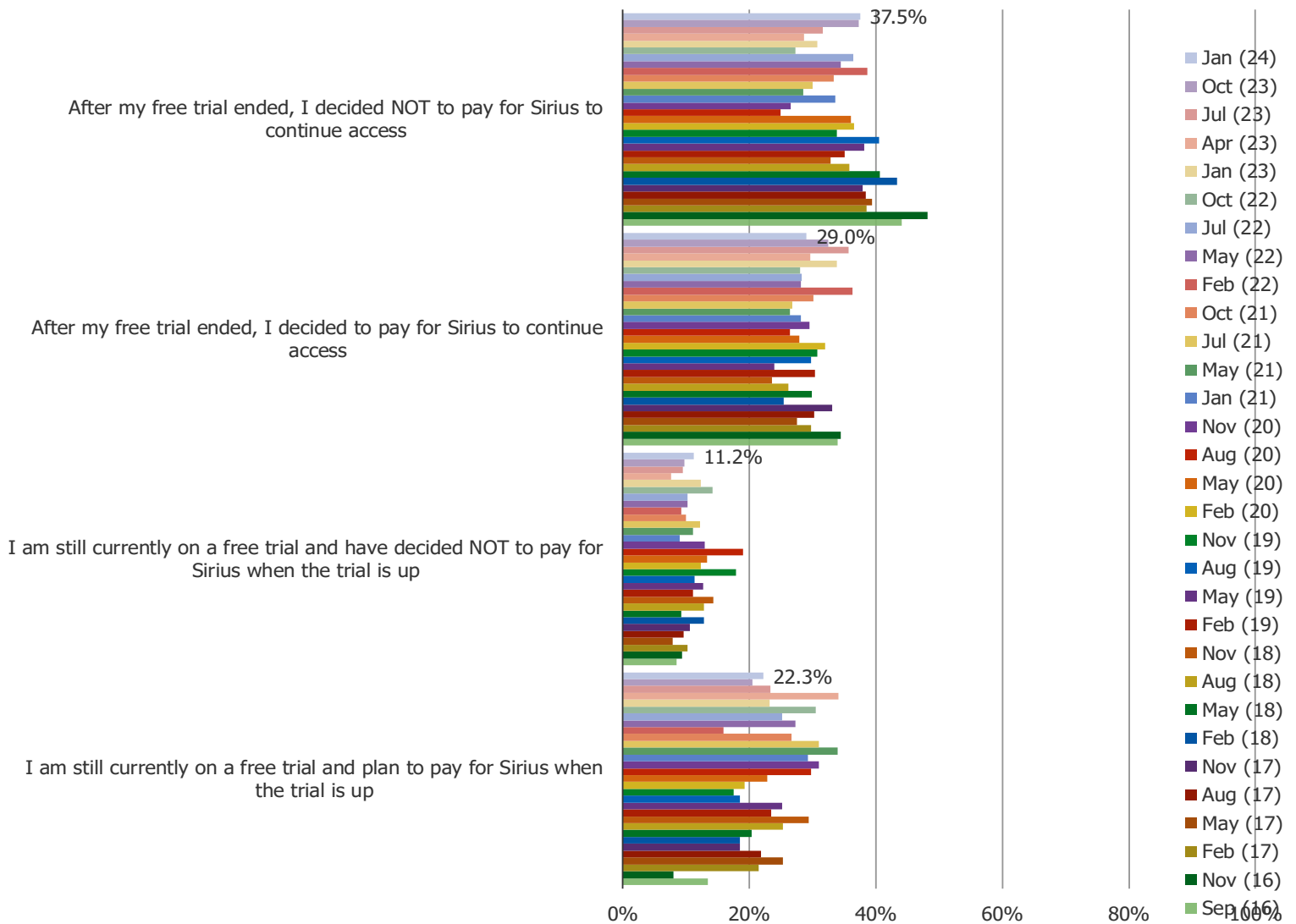
WHEN YOU MOST RECENTLY LEASED OR BOUGHT A CAR, DID IT COME WITH A FREE TRIAL TO SIRIUS RADIO?

Posed to all respondents who own / lease a car



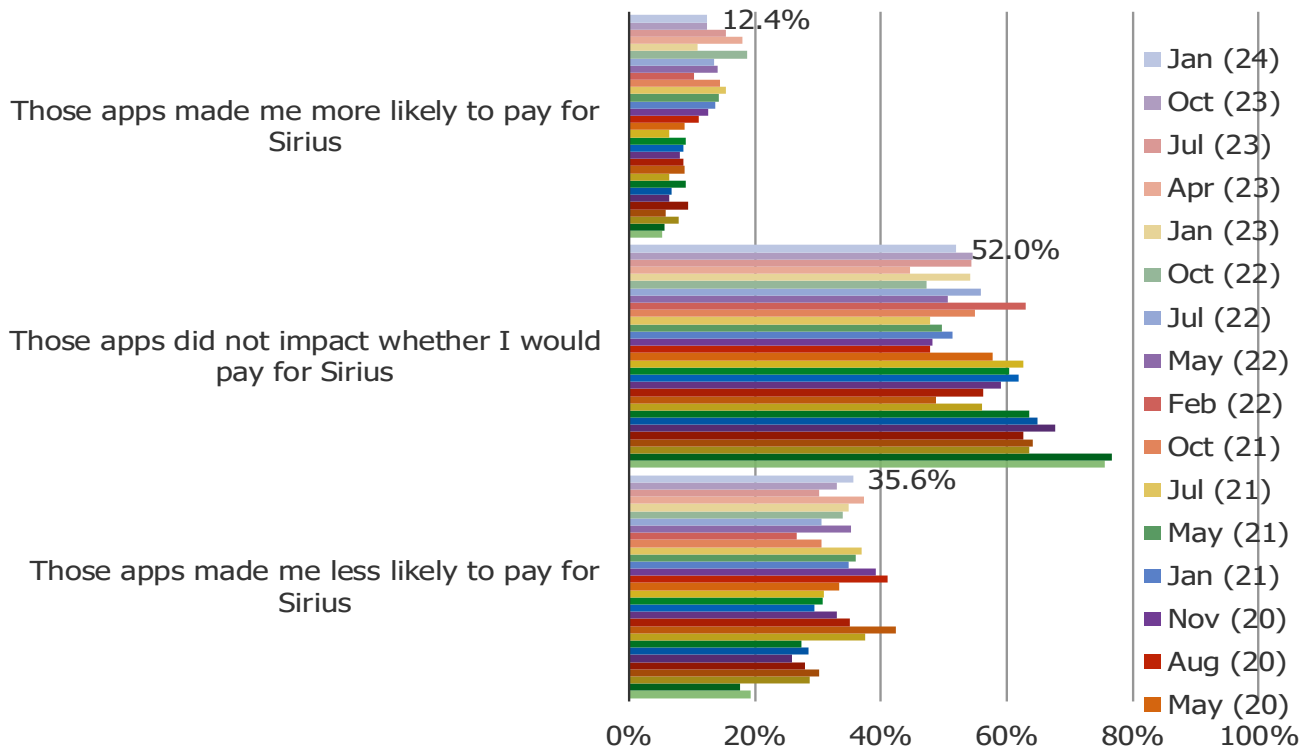
WHEN THE FREE TRIAL WAS UP, WHAT DID YOU DO?

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?

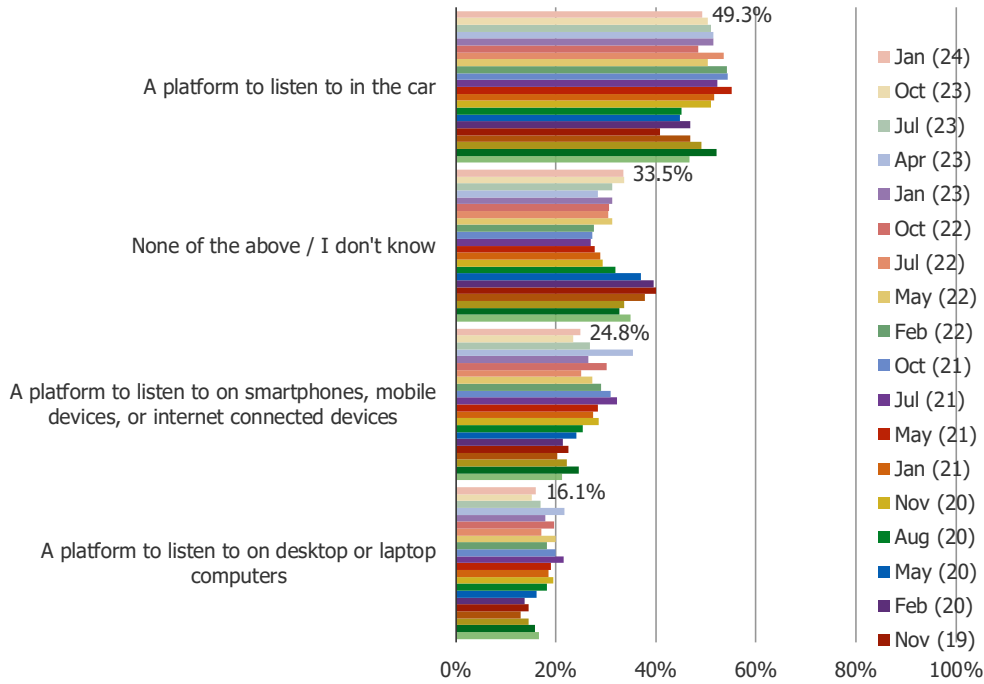
Posed to respondents who had/have a free trial when they most recently got a new car.



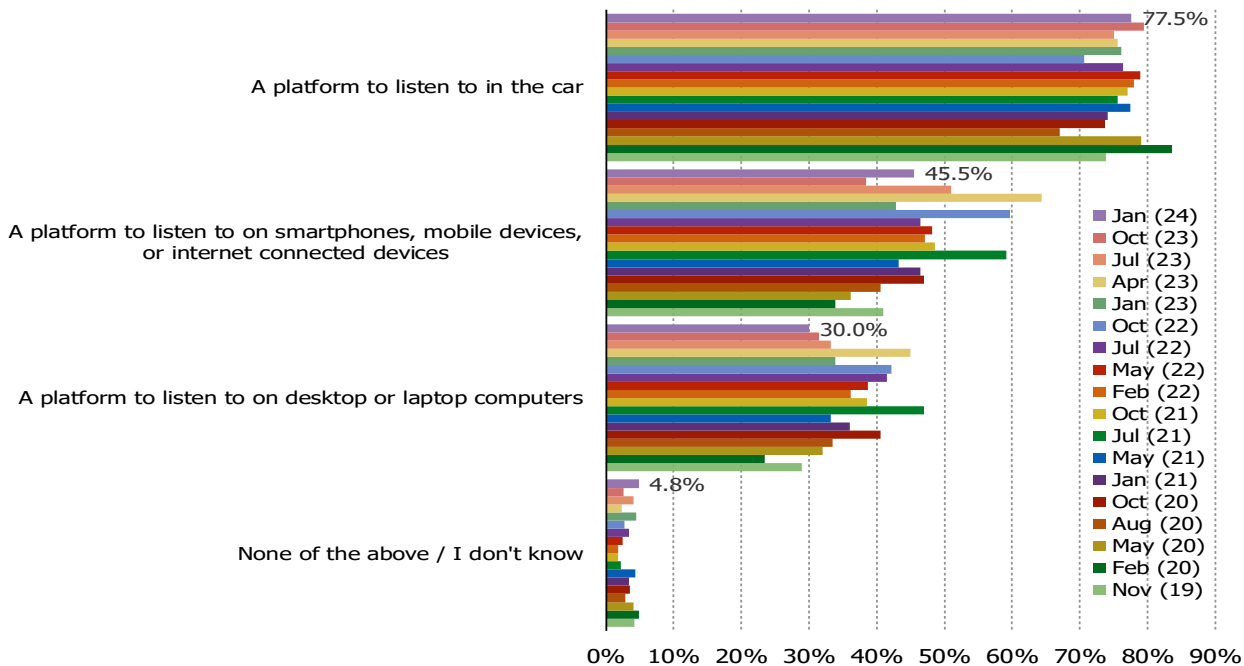
SIRIUS XM

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

Posed to all respondents.

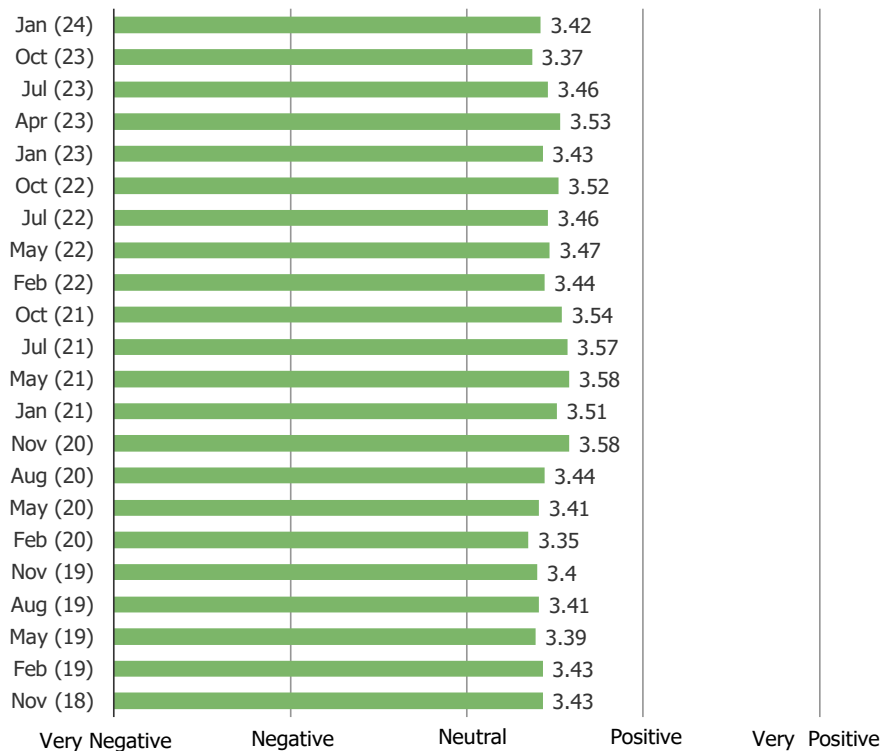


Posed to paying Sirius subscribers.

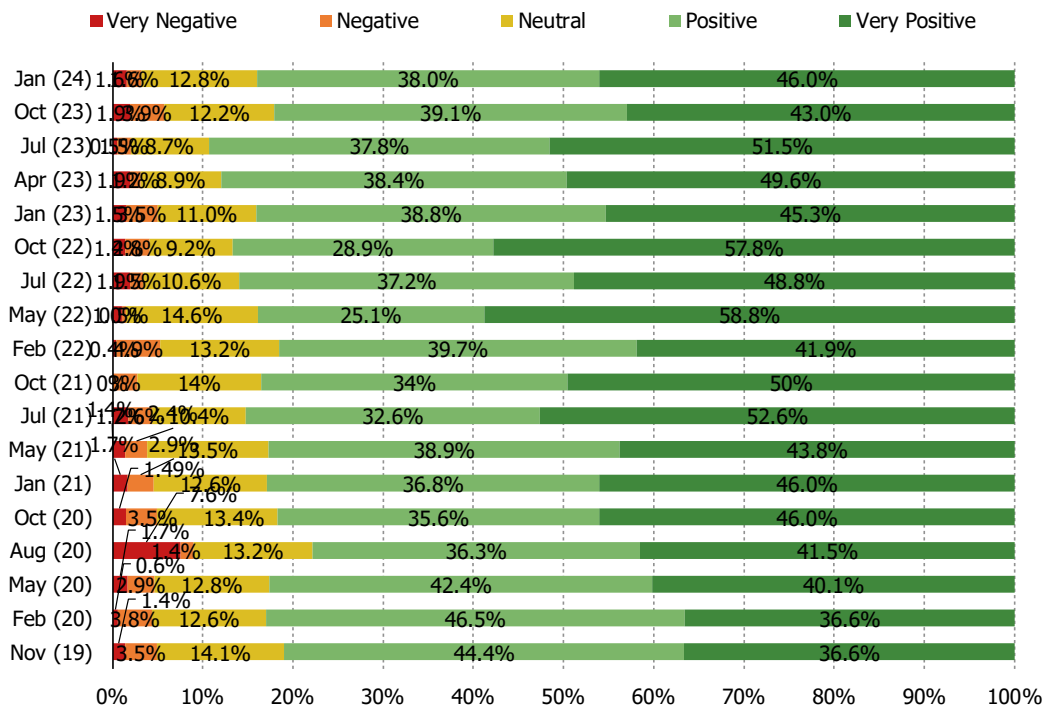


WHAT IS YOUR PERCEPTION OF SIRIUS XM?

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.

Because they seem to have high prices

Still has ads and station selection is poor

Don't like it

Because it isn't reliable like Spotify and Apple music

Too expensive for something with less songs than other platforms

Music suggestions are bad

Many of the stations to listen to have moved away from Sirius

Family members have had it and don't like it

Seems like a thing of the past. I don't know of anyone who pays for Sirius after their free couple months is up

I don't like the experience I've had with them

For what it costs, I can get great programming through Pandora for free

Because I don't like most of the stations

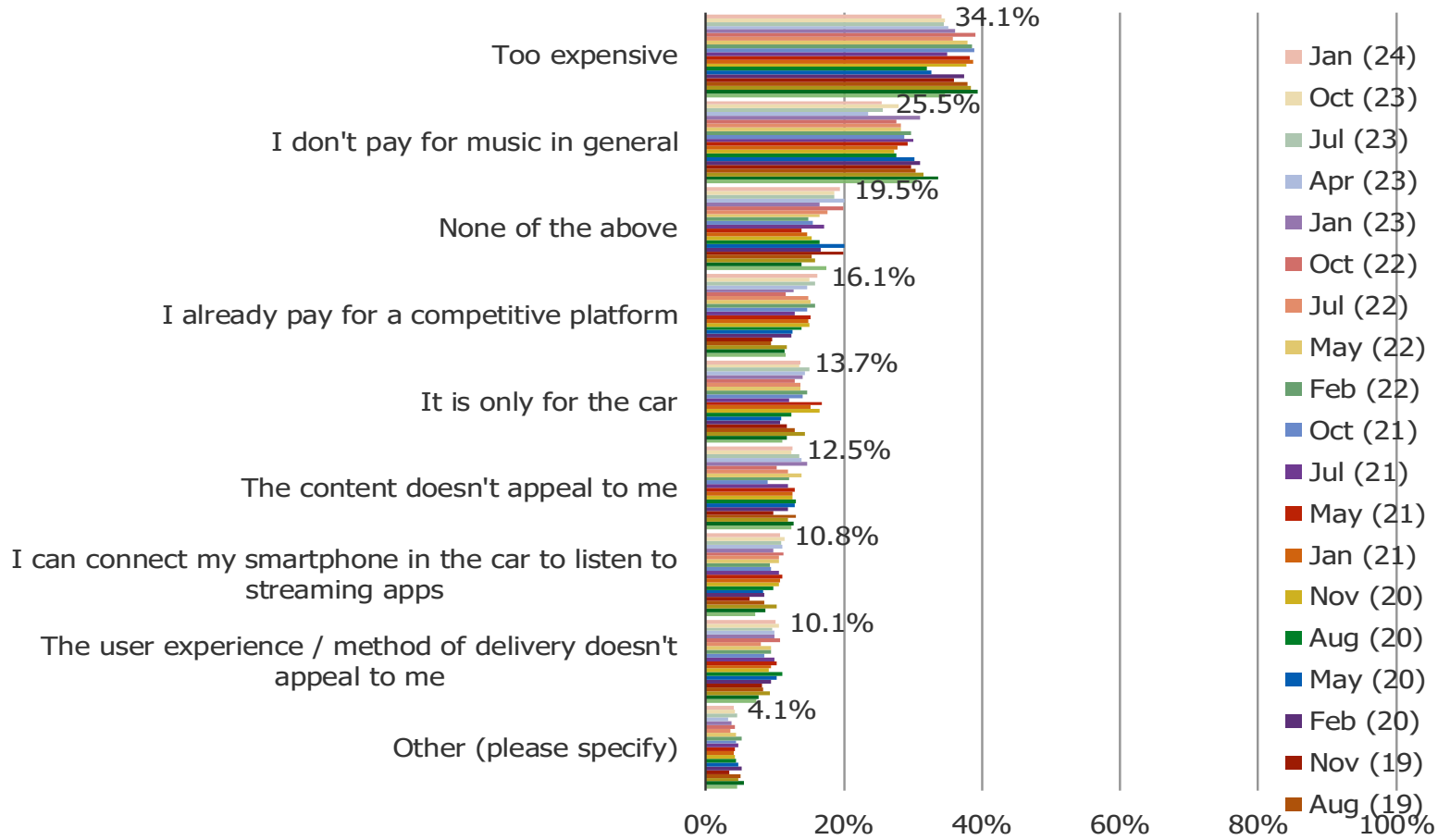
Too many different programs to keep up with

Poor customer service

You can't unsubscribe even after trying often

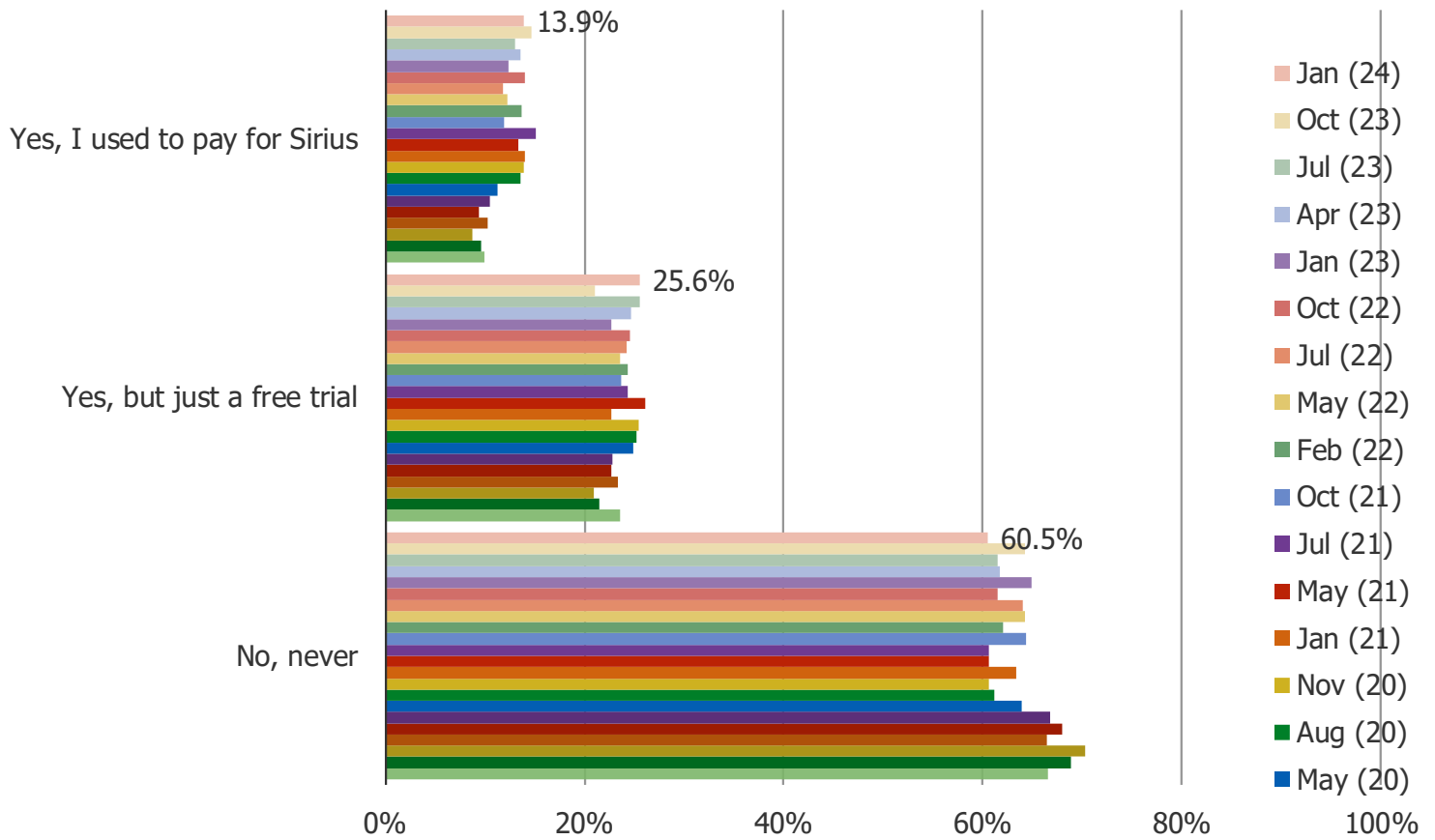
WHY ARE YOU NOT A SIRIUS XM SUBSCRIBER? (SELECT ALL THAT APPLY)

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



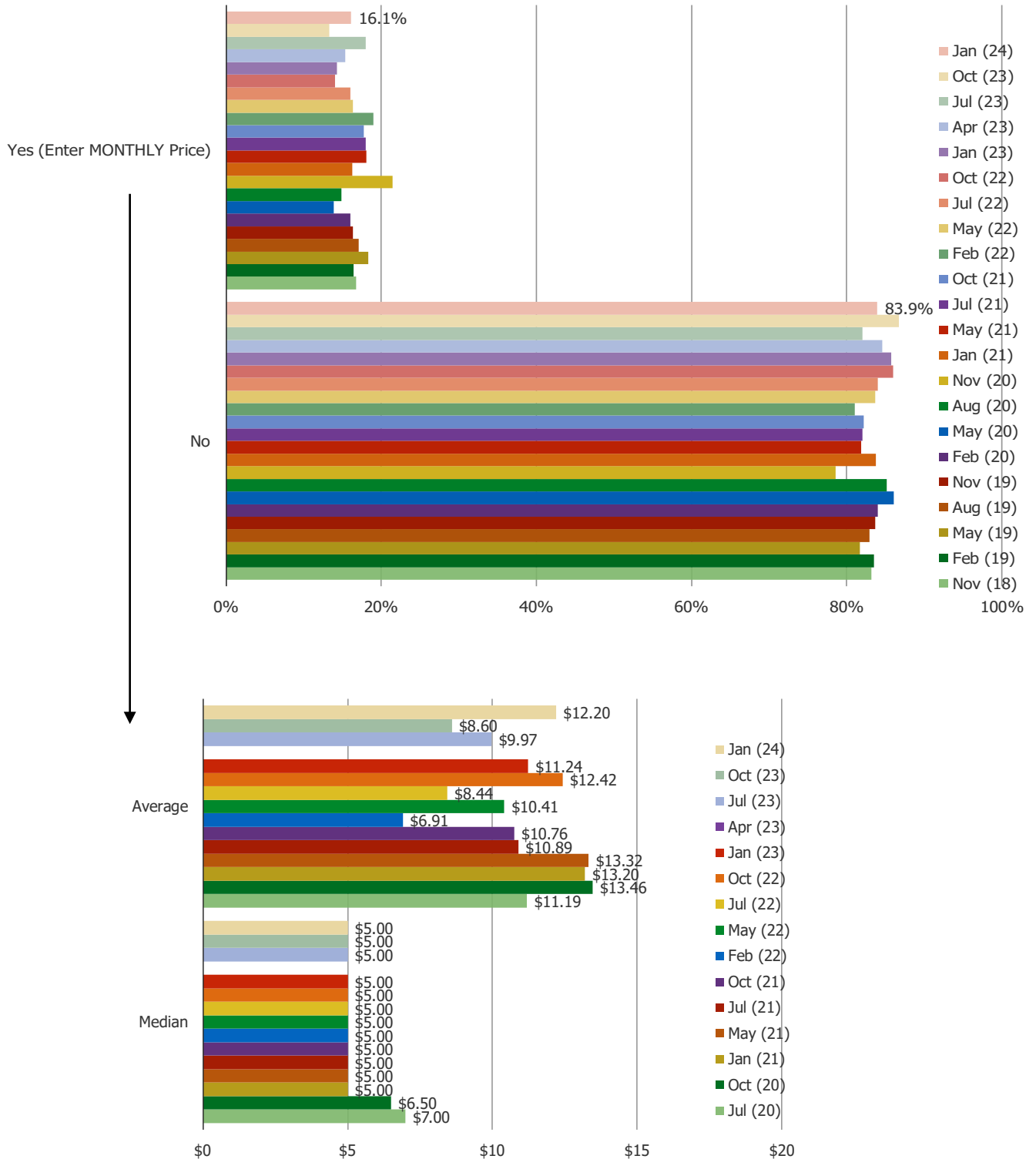
HAVE YOU EVER BEEN A SIRIUS XM SUBSCRIBER?

Posed to non-Sirius XM subscribers.



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

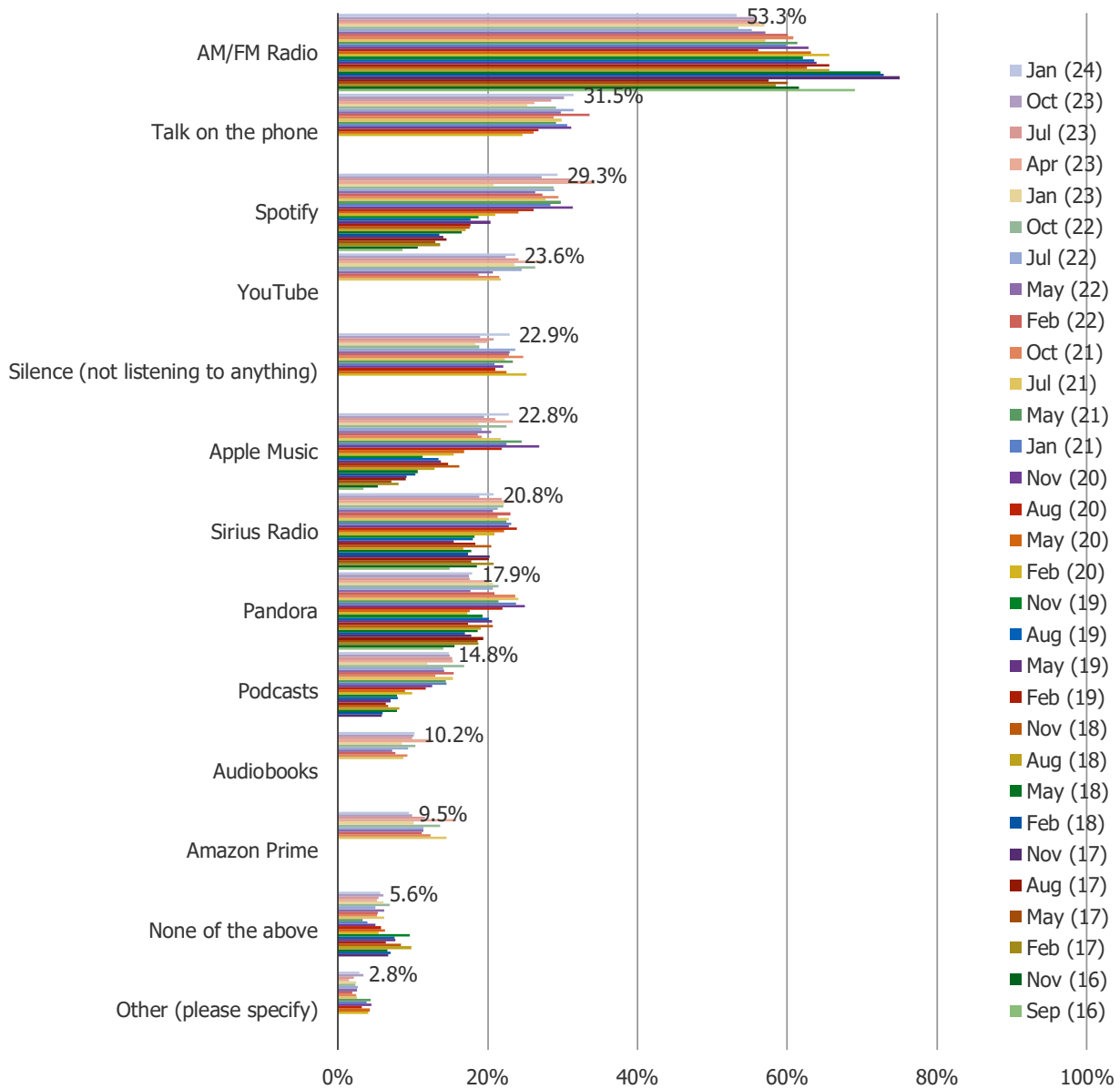
Posed to non-Sirius XM subscribers.



MARKET SHARE IN THE CAR

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

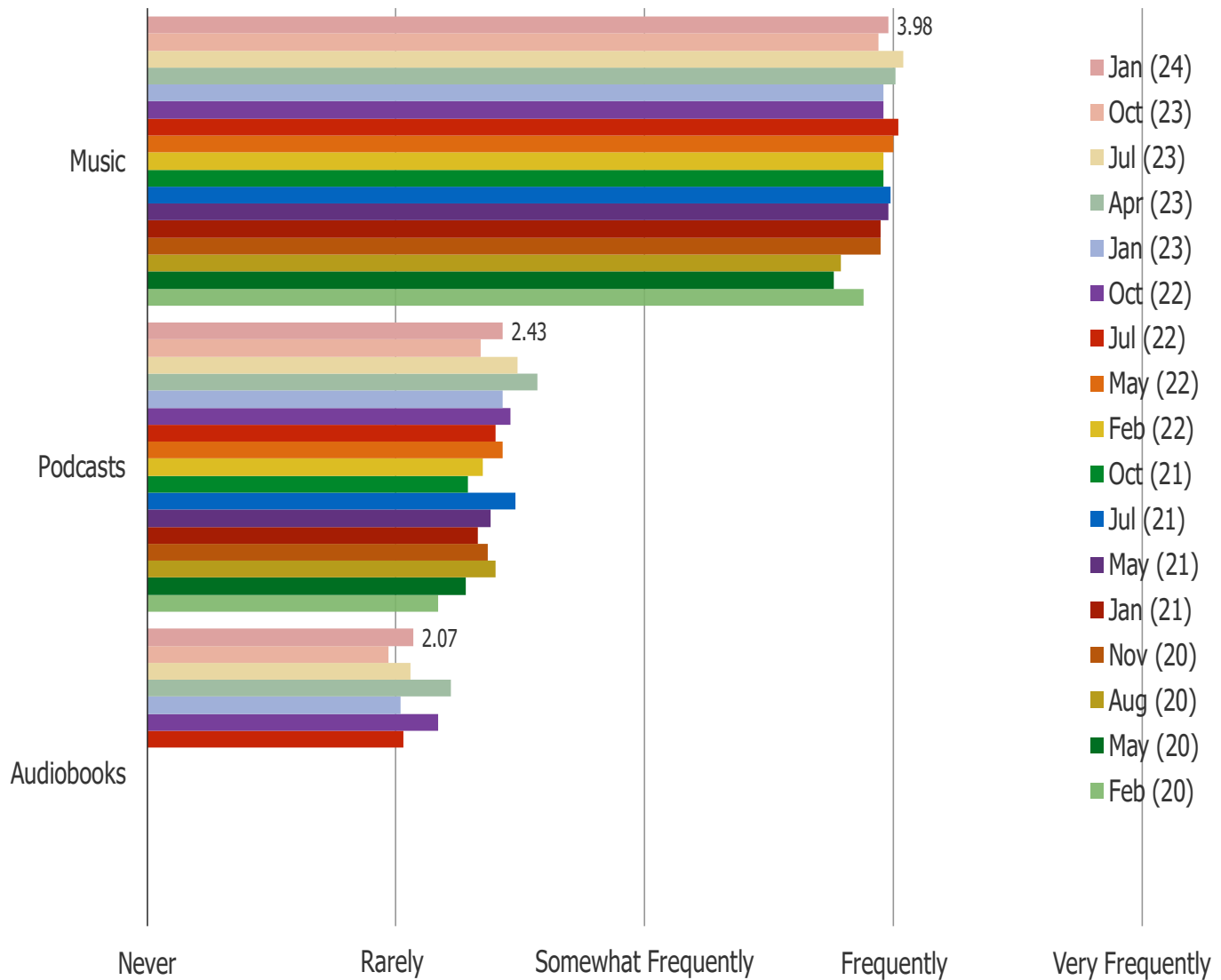
Posed to all respondents who own / lease a car



AIRPODS

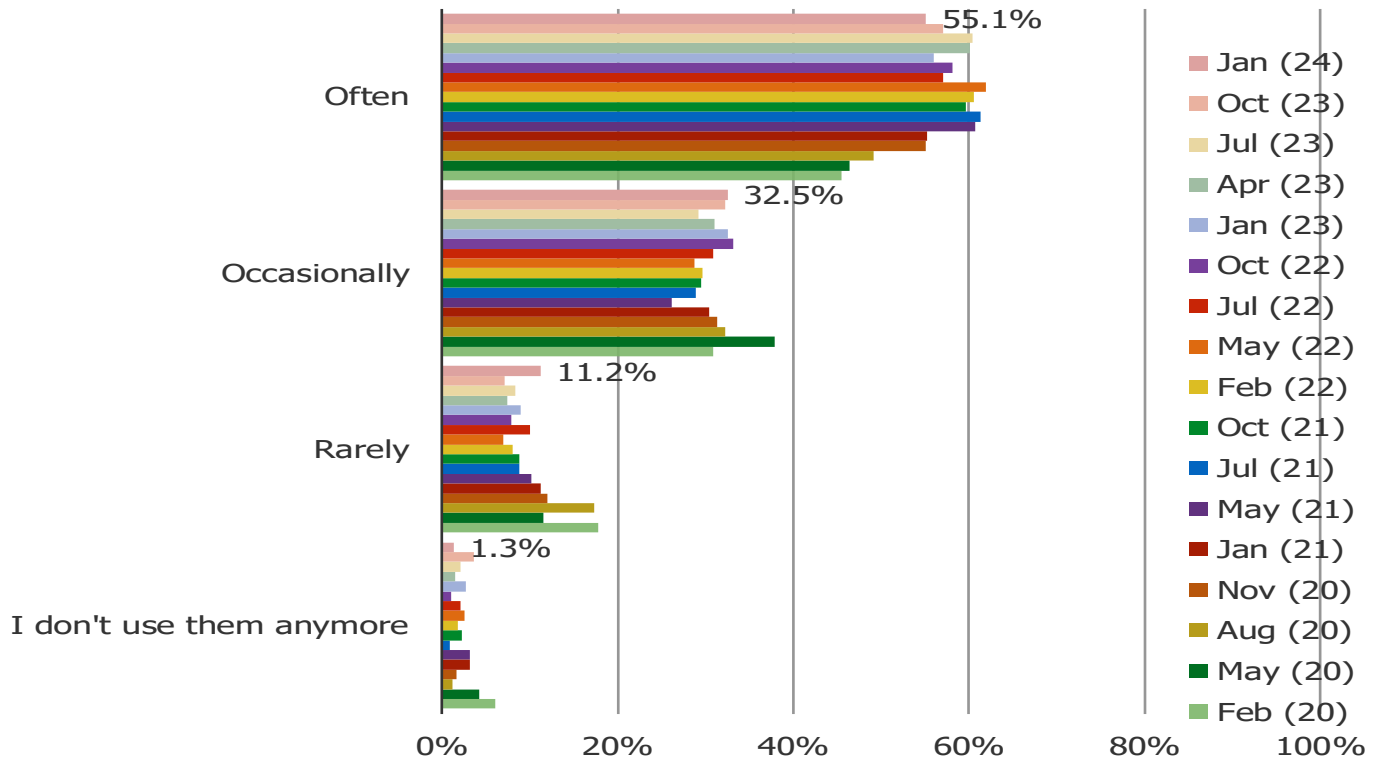
HOW OFTEN DO YOU LISTEN TO...

Posed to all respondents



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

