

BESPOKE SURVEYS

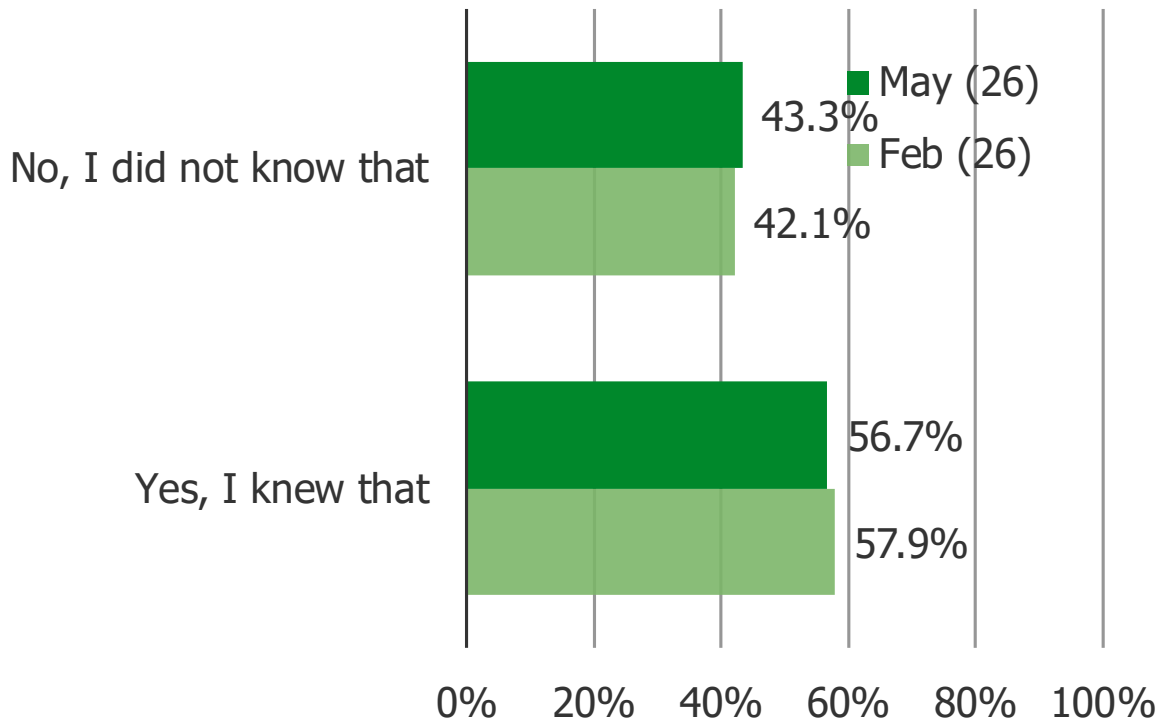
Audio (Streaming and Radio) Vol 39

1000+ Respondents Per Quarter

NEW QUESTIONS

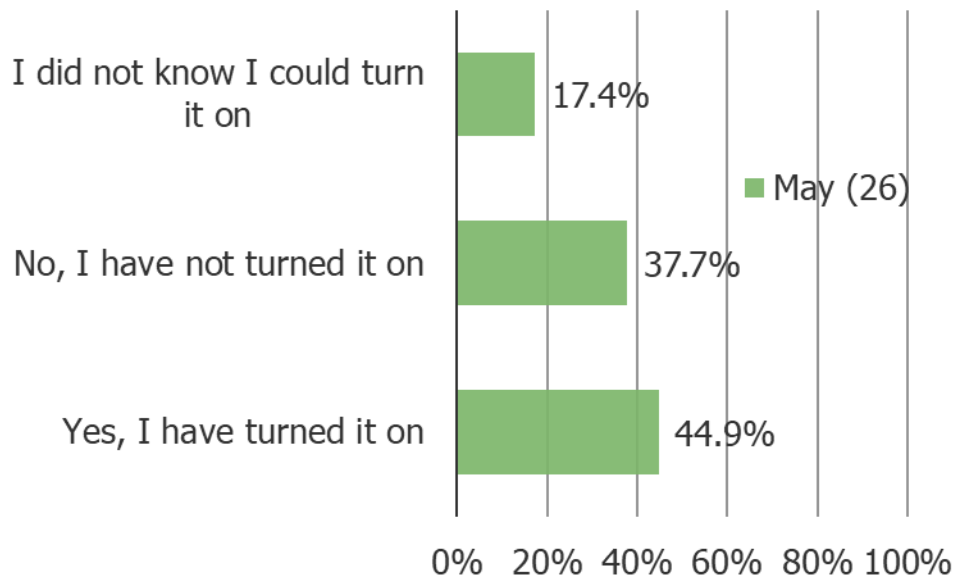
DID YOU KNOW THAT SPOTIFY PREMIUM PLANS NOW INCLUDE LOSSLESS / HIGH FIDELITY AUDIO?

Posed to respondents who use Spotify (N = 388)



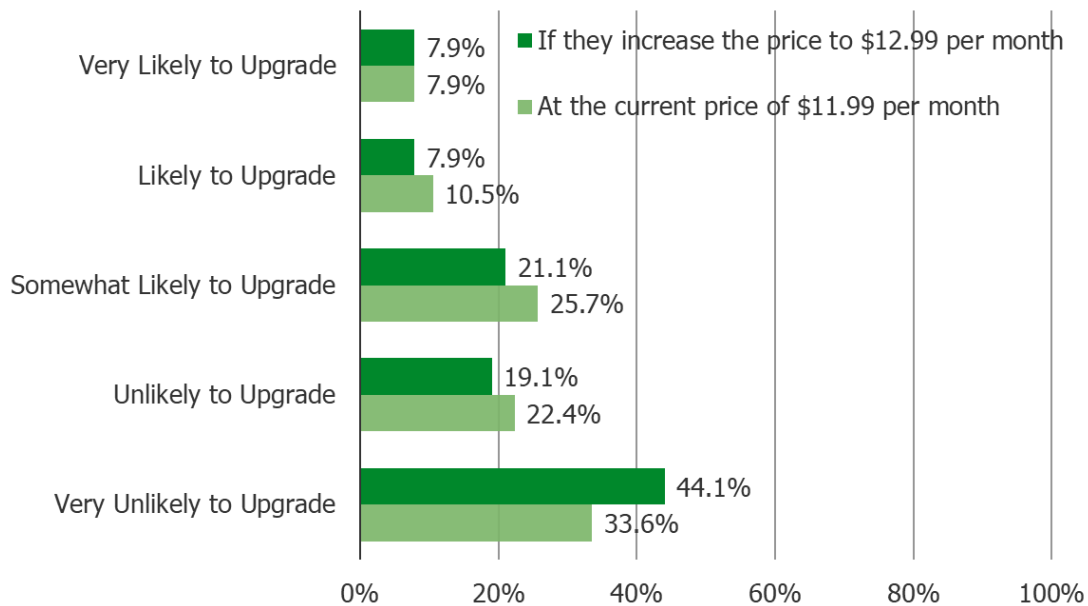
HAVE YOU MANUALLY ENABLED LOSSLESS AUDIO IN YOUR SETTINGS?

Posed to paid users of Spotify (N = 236)

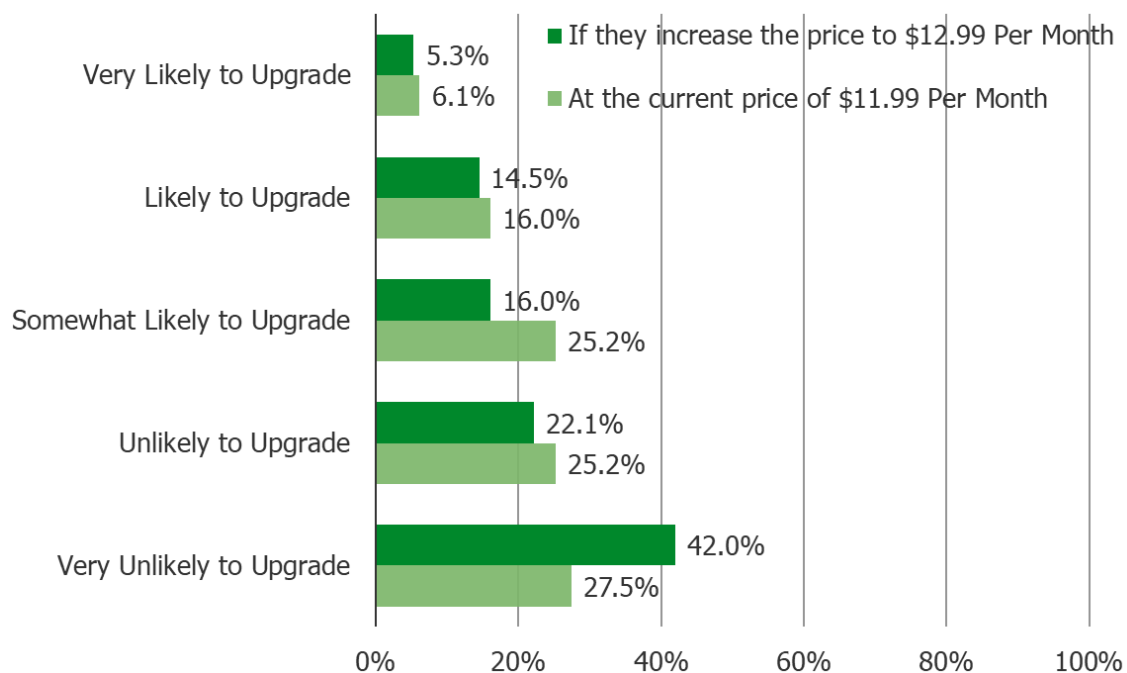


NOW THAT SPOTIFY HAS LOSSLESS AUDIO IN ITS PREMIUM PLANS, HOW LIKELY ARE YOU TO UPGRADE IN THE NEXT FEW MONTHS?

Posed to Spotify Free Account Holders (N = 131)

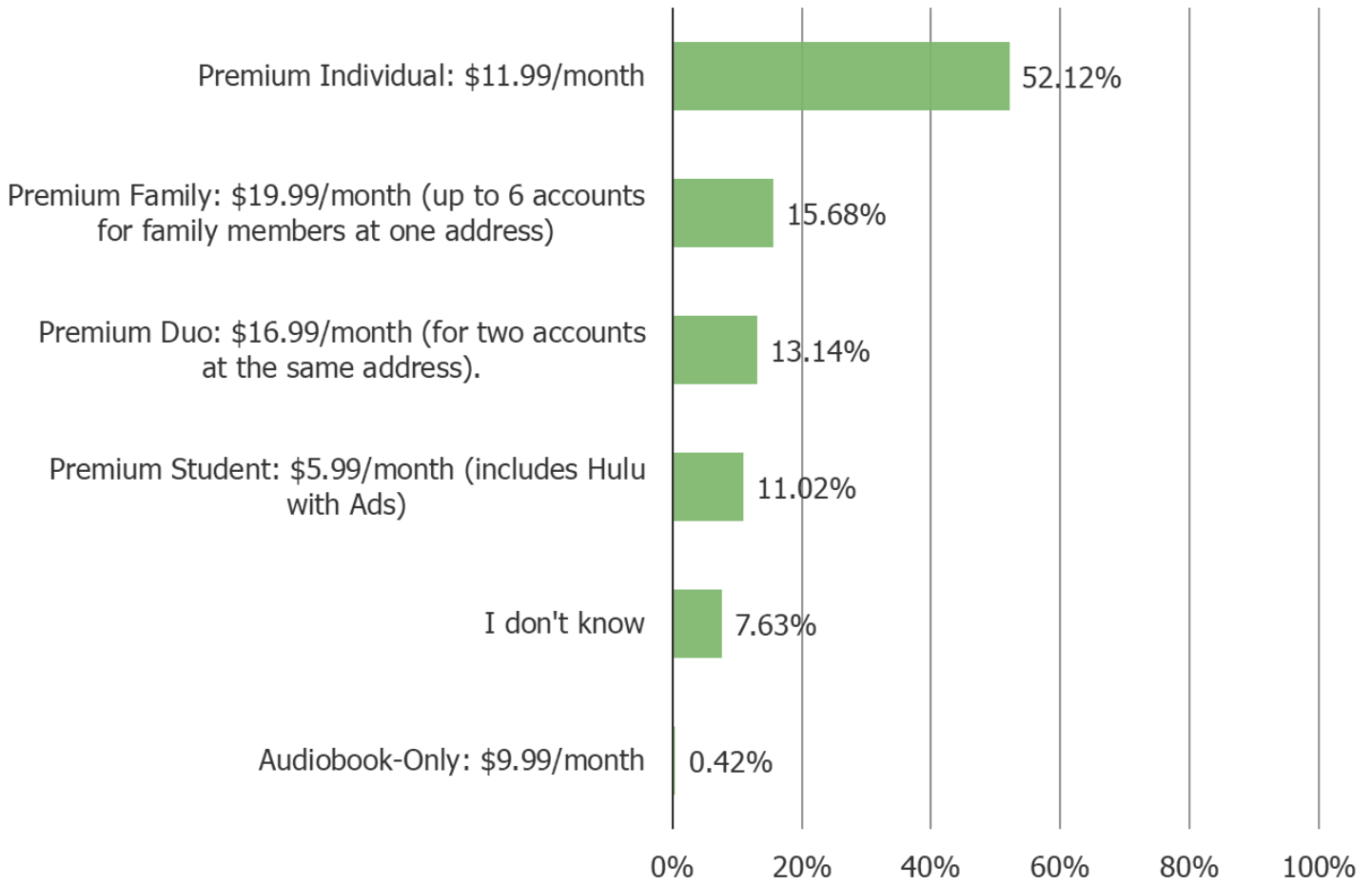


April 2026 Data



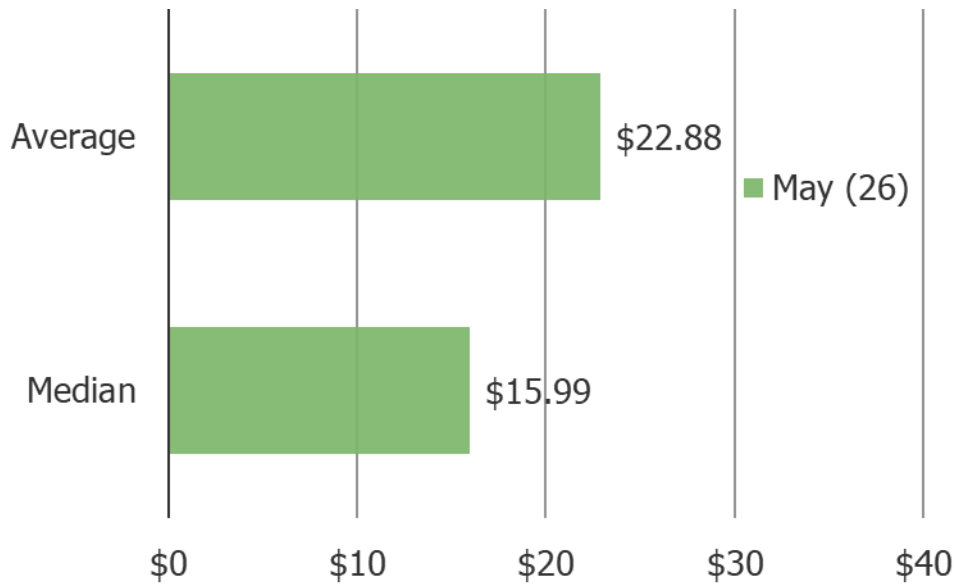
WHICH SPOTIFY PREMIUM PLAN DO YOU CURRENTLY PAY FOR?

Posed to Spotify Premium members (N = 250)



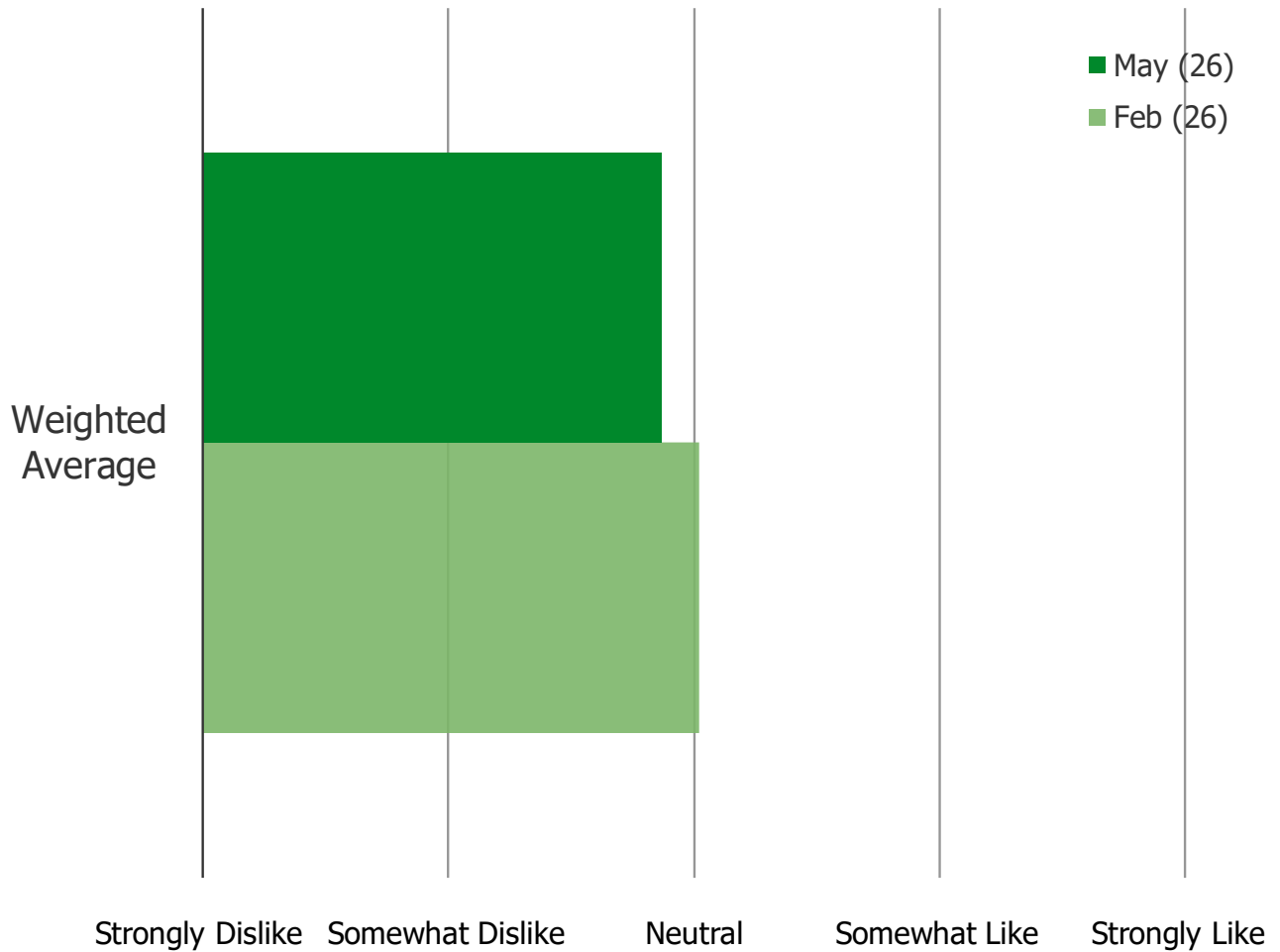
AT WHAT MONTHLY PRICE POINT WOULD YOU DECIDE TO CANCEL YOUR SPOTIFY SUBSCRIPTION?
(IE, IF SPOTIFY CONTINUES TO RAISE PRICES, WHAT PRICE POINT PER MONTH WOULD TRIGGER
YOUR CANCELLATION OF SPOTIFY)?

Posed to respondents who use Spotify (N = 388)



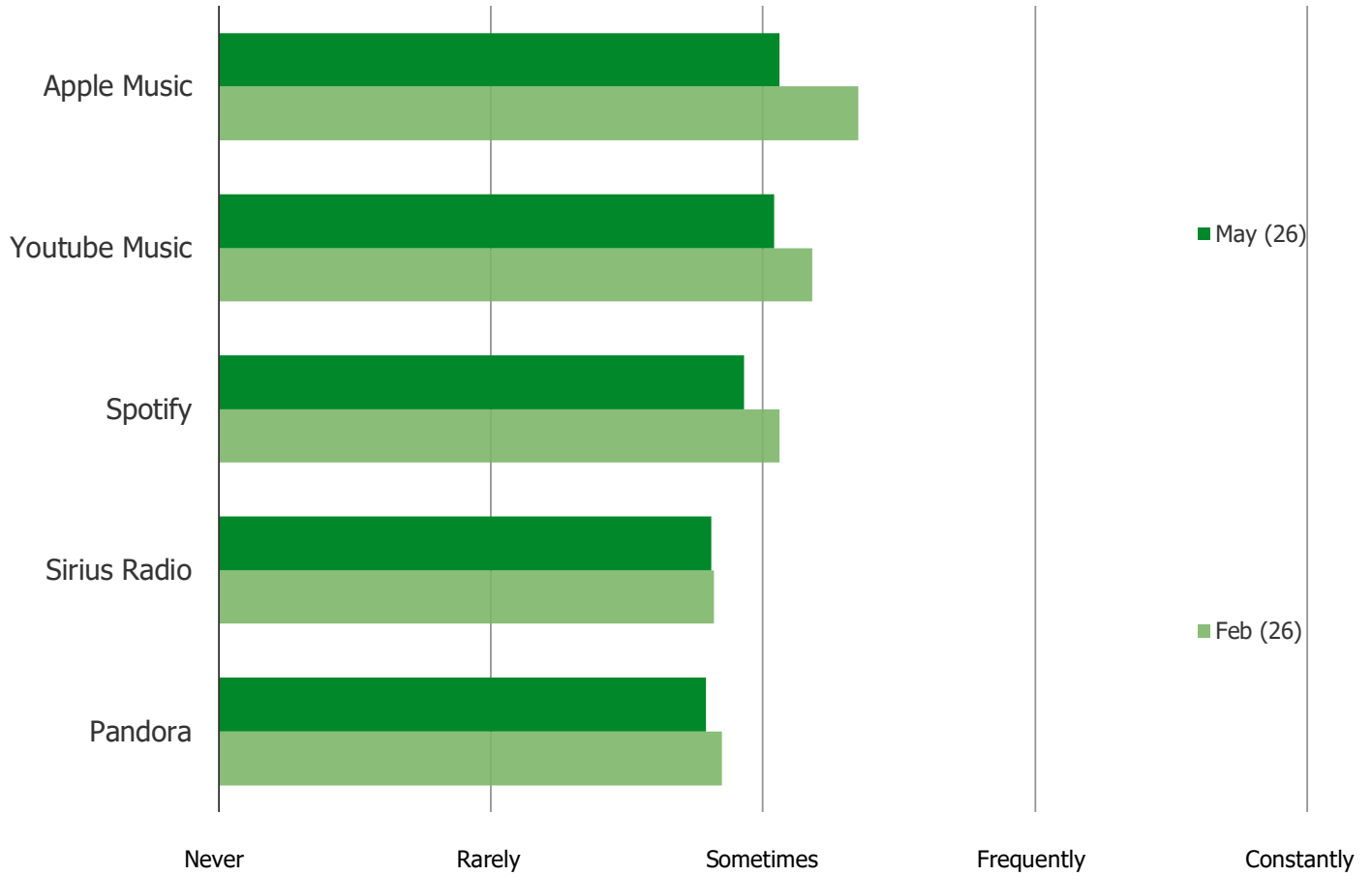
DO YOU LIKE ENCOUNTERING SONGS/AUDIO MADE BY AI IN YOUR DISCOVERY FEED ON STREAMING MUSIC PLATFORMS?

Posed to all respondents.



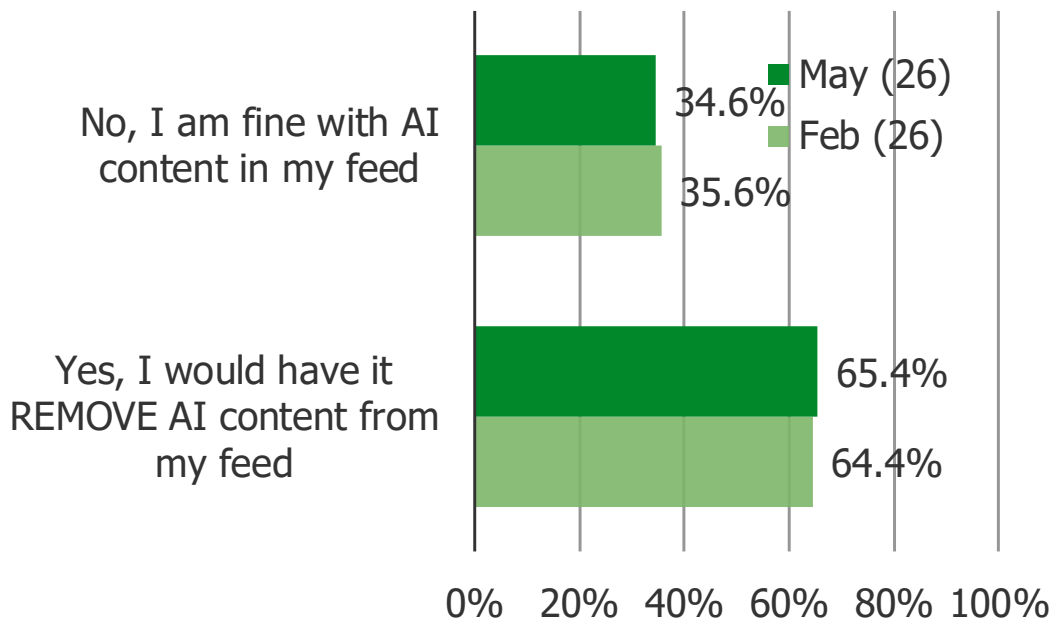
HOW OFTEN HAVE YOU COME ACROSS AI-GENERATED MUSIC IN YOUR FEED ON THE FOLLOWING?

Posed to respondents who use the below.

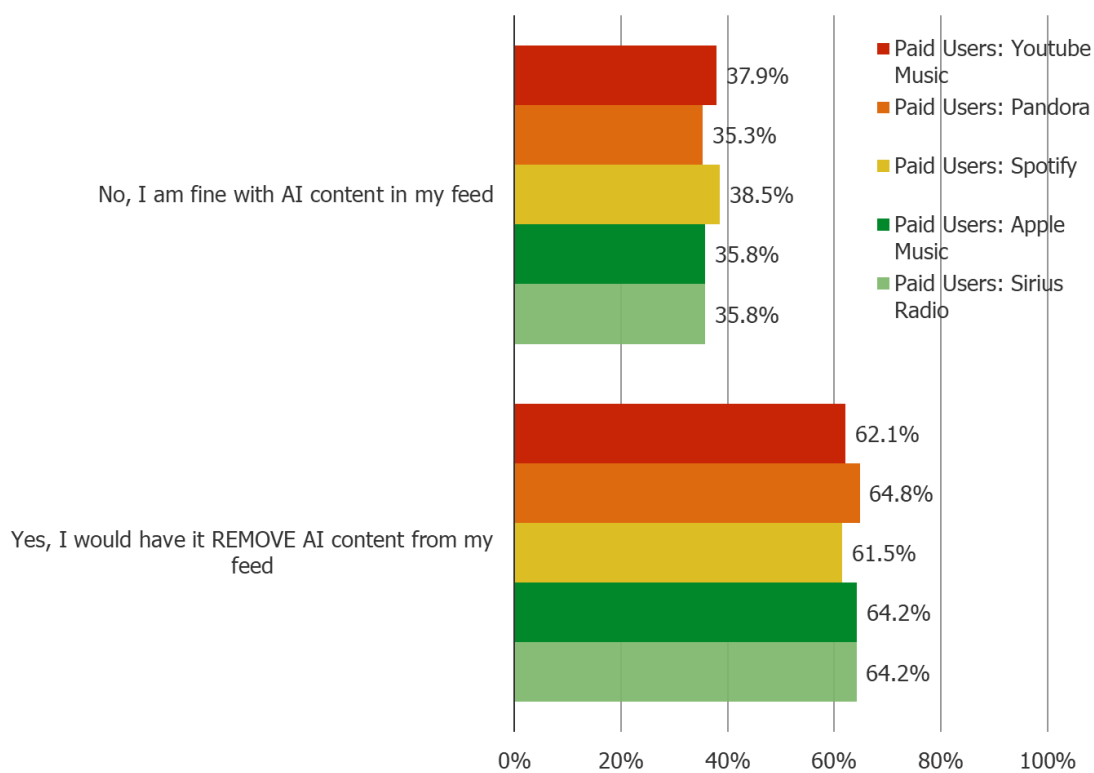


IF THERE WAS A "FILTER OUT AI BUTTON" IN YOUR STREAMING MUSIC PLATFORM SETTINGS, WOULD YOU CHOOSE TO USE IT?

Posed to all respondents.

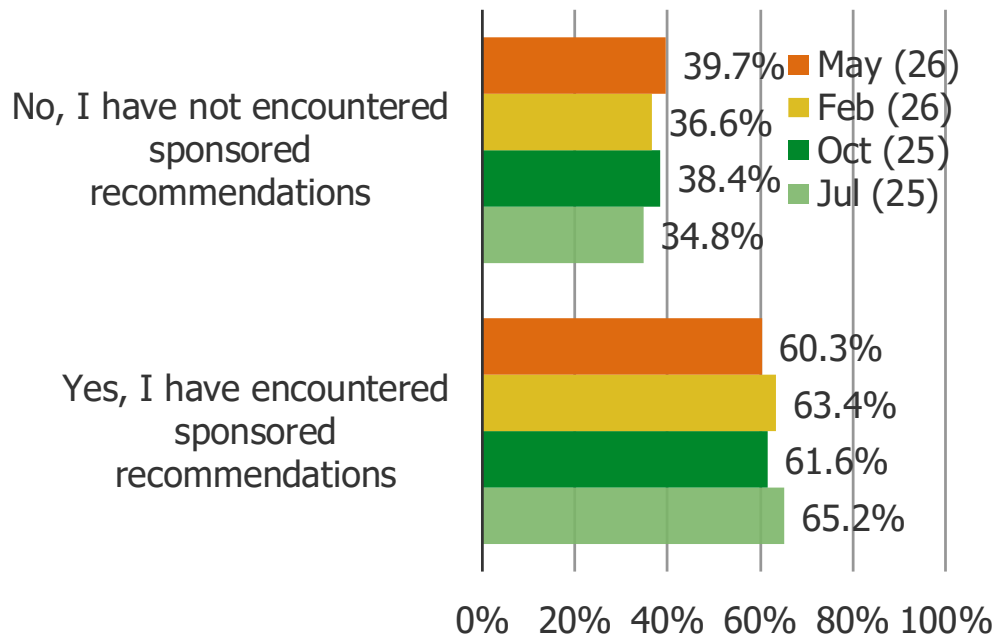


Cross-Tab Analysis: Posed to Paid Users of Each Platform...

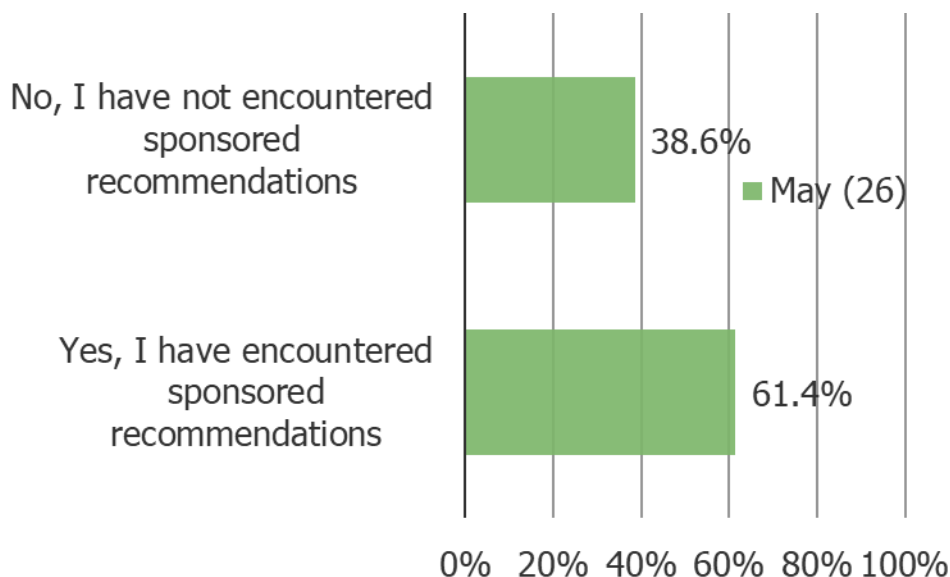


WHILE USING THE SPOTIFY APP, HAVE YOU ENCOUNTERED SPONSORED RECOMMENDATIONS IN YOUR HOME PAGE? SPONSORED RECOMMENDATIONS ARE SMALL POP-UPS IN YOUR HOME PAGE THAT SHOW MUSIC SUGGESTIONS AND SAY "SPONSORED RECOMMENDATION" NEAR IT.

Posed to respondents who use Spotify (N = 398)

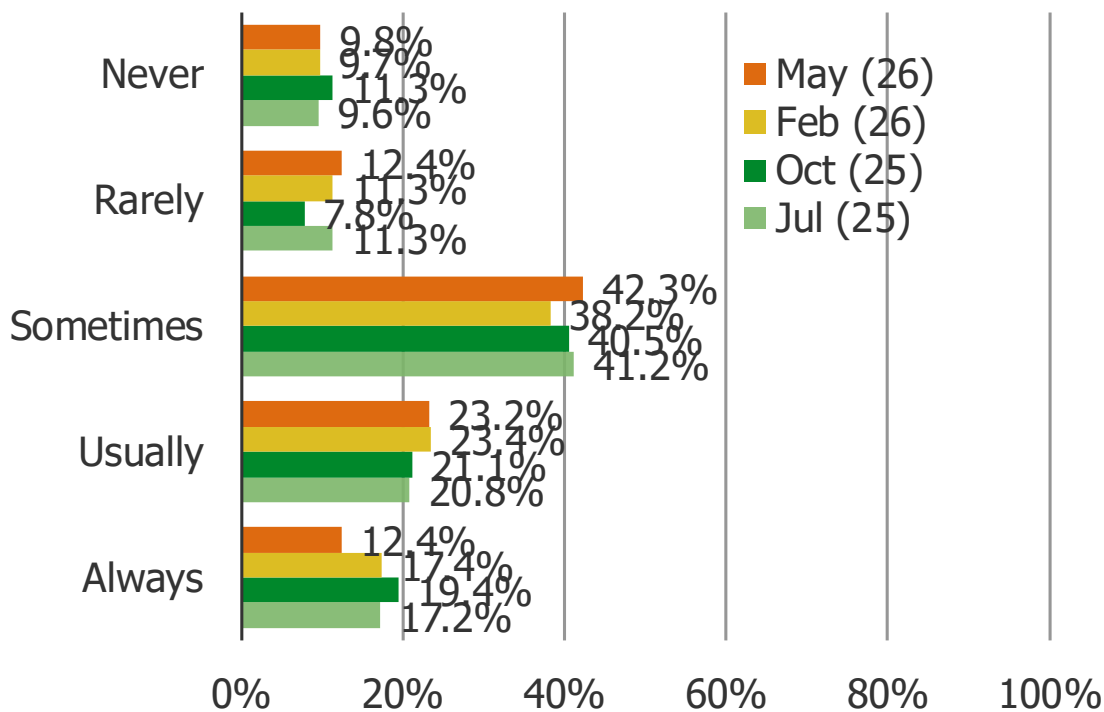


Filter: Paying Spotify Subscribers (N = 236)

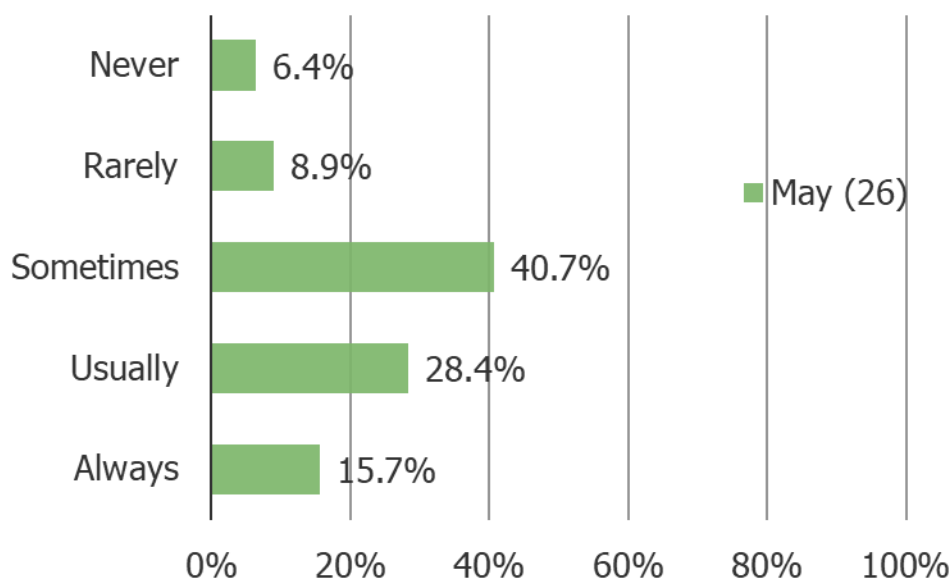


WHEN YOU ENCOUNTERED SPONSORED POSTS, HOW OFTEN HAVE THEY BEEN OF ARTISTS THAT YOU TYPICALLY LISTEN TO MUSIC FROM?

Posed to respondents who use Spotify (N = 388)

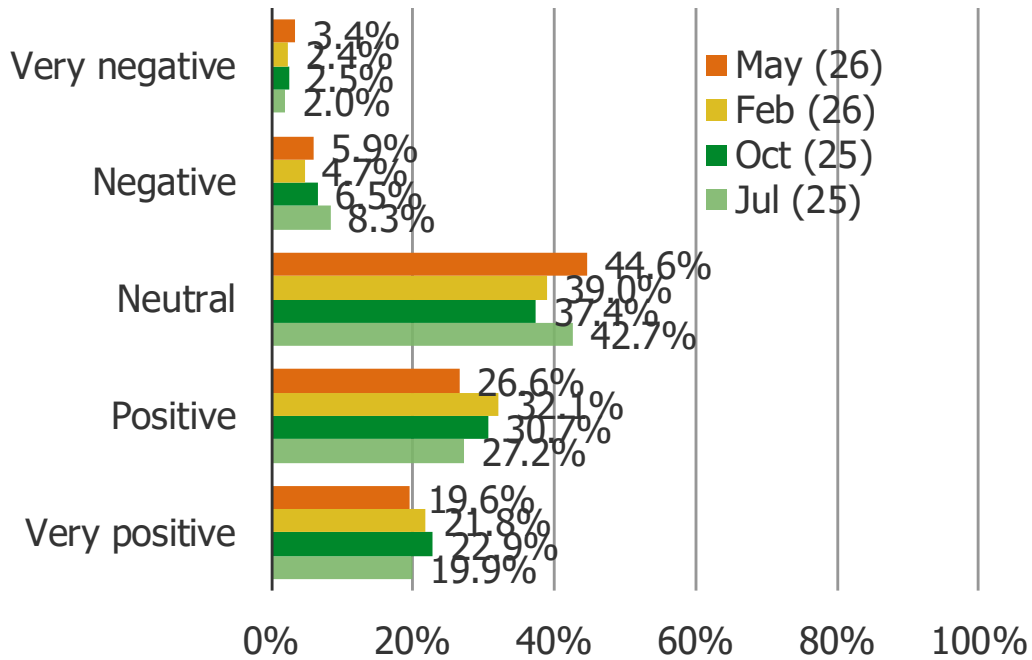


Filter: Paying Spotify Subscribers (N = 236)

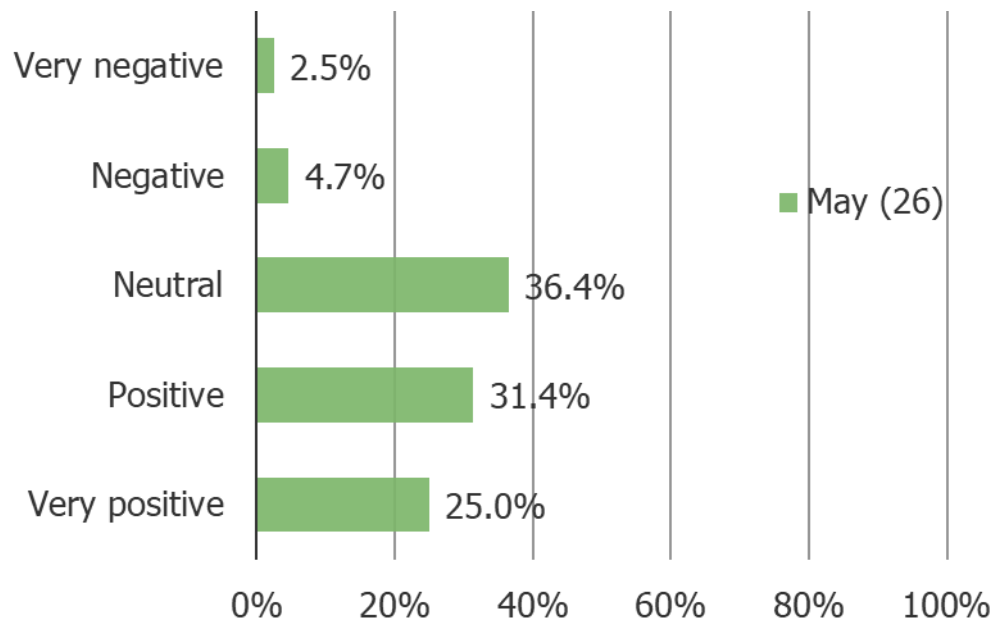


WHAT IS YOUR OPINION OF SPONSORED RECOMMENDATIONS IN THE SPOTIFY HOME PAGE?

Posed to respondents who use Spotify (N = 388)

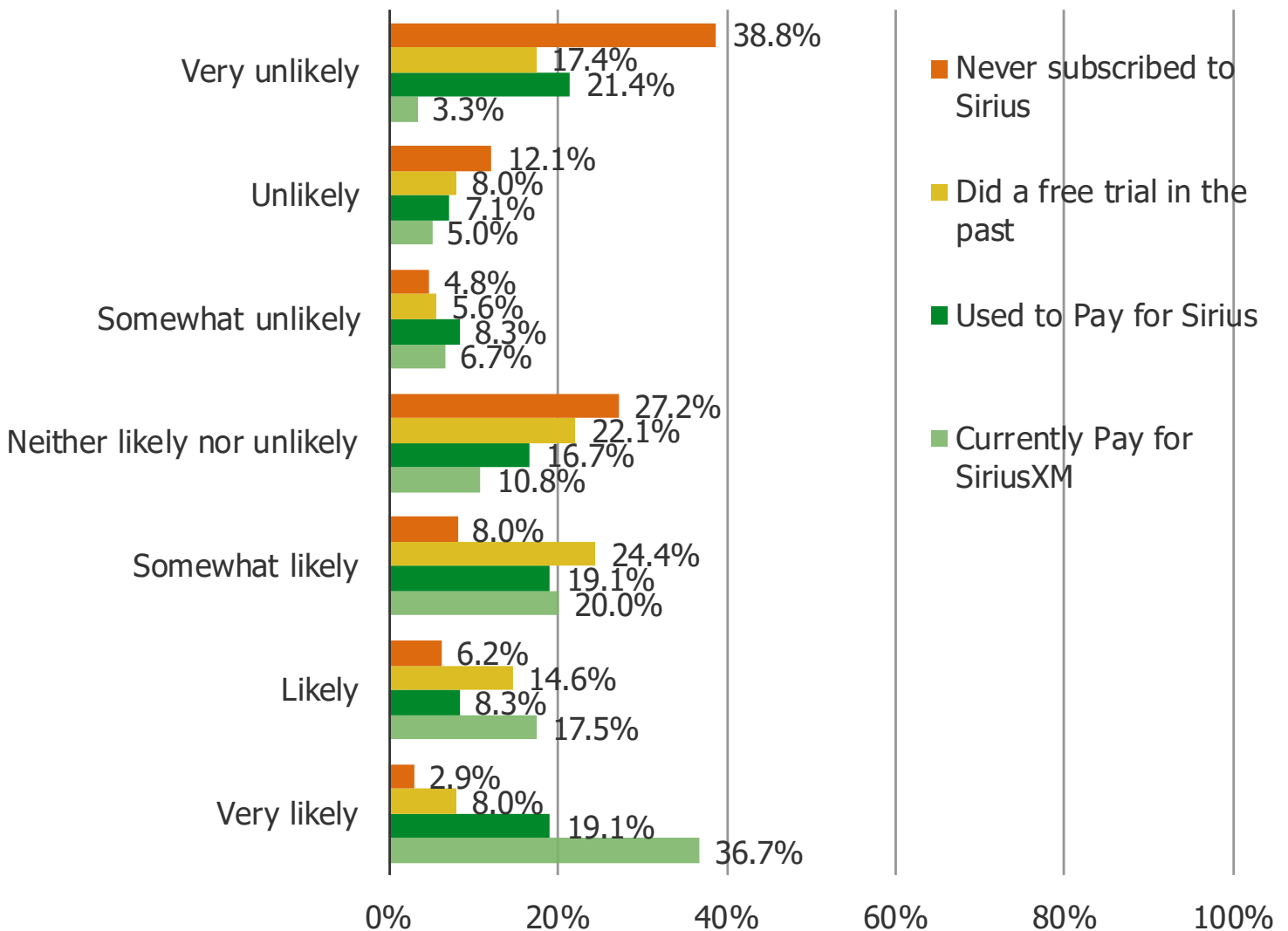


Filter: Paying Spotify Subscribers (N = 236)



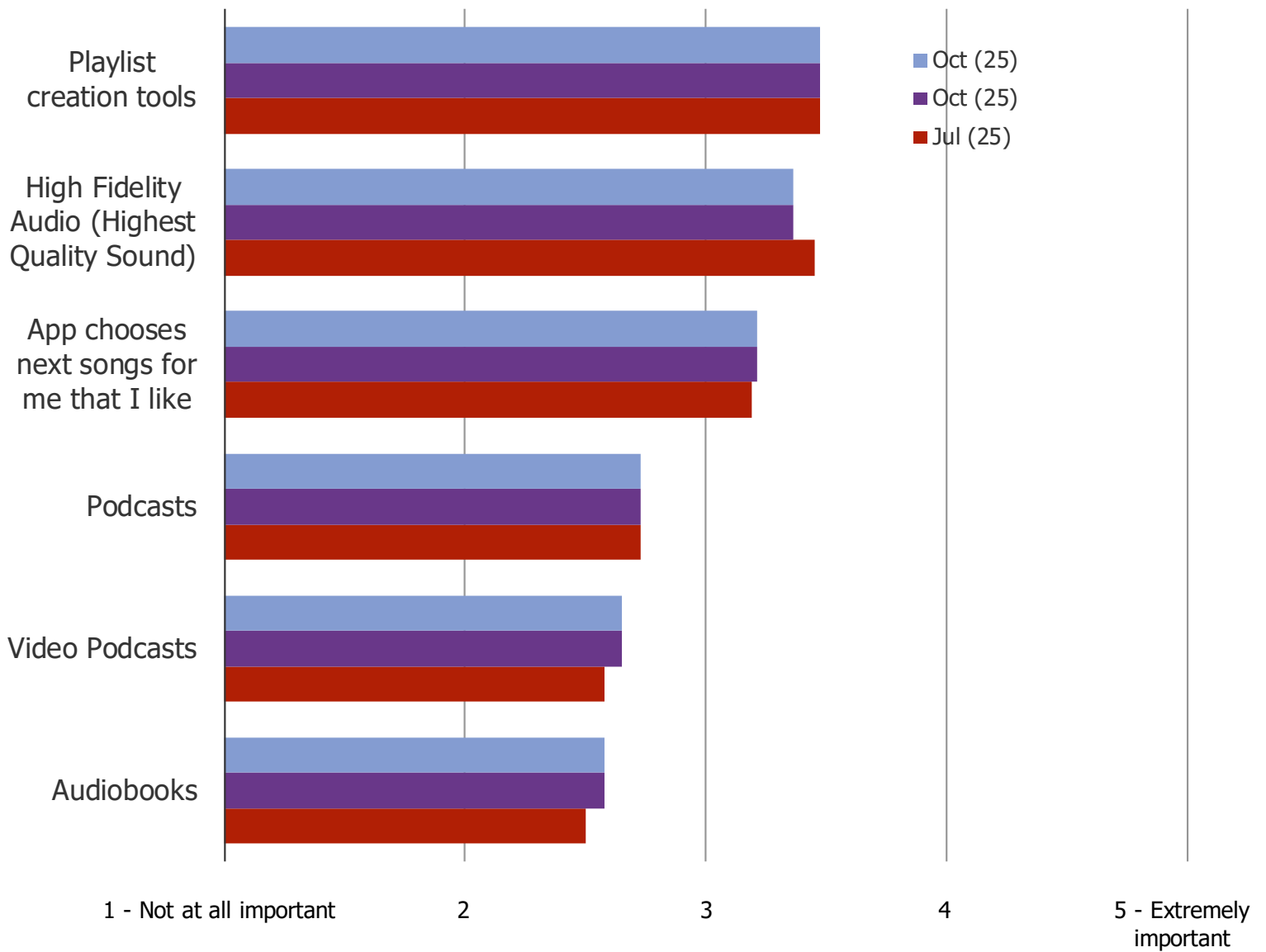
IF SIRIUSXM OFFERED A CHEAPER SUBSCRIPTION PLAN THAT INCLUDED OCCASIONAL ADS, HOW LIKELY WOULD YOU BE TO CONSIDER SUBSCRIBING?

Posed to all respondents, cross-tabbed by their relationship with Sirius XM.



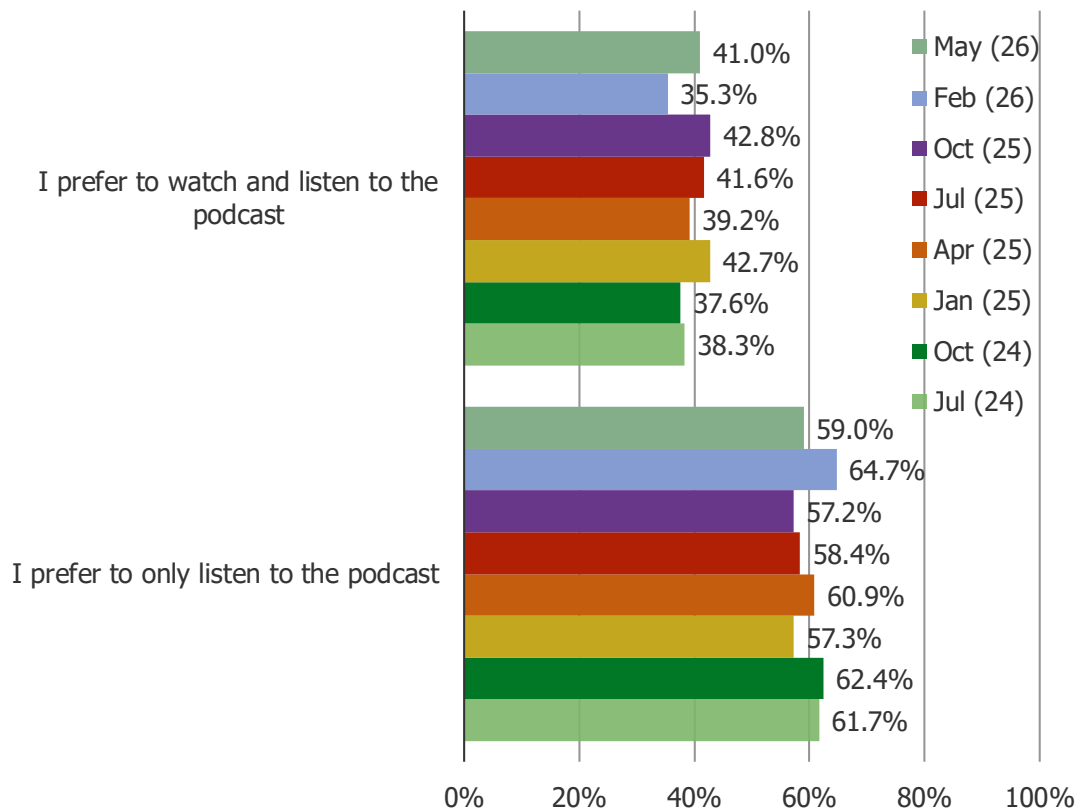
HOW IMPORTANT ARE THE FOLLOWING FEATURES TO YOU IN A MUSIC/AUDIO APP?

Posed to all respondents.



WHEN YOU THINK ABOUT LISTENING TO PODCASTS, DO YOU PREFER TO JUST LISTEN TO THE PODCAST OR LISTEN AND WATCH THE PODCAST AT THE SAME TIME?

Posed to all respondents who listen to podcasts.



Audio Preferences:

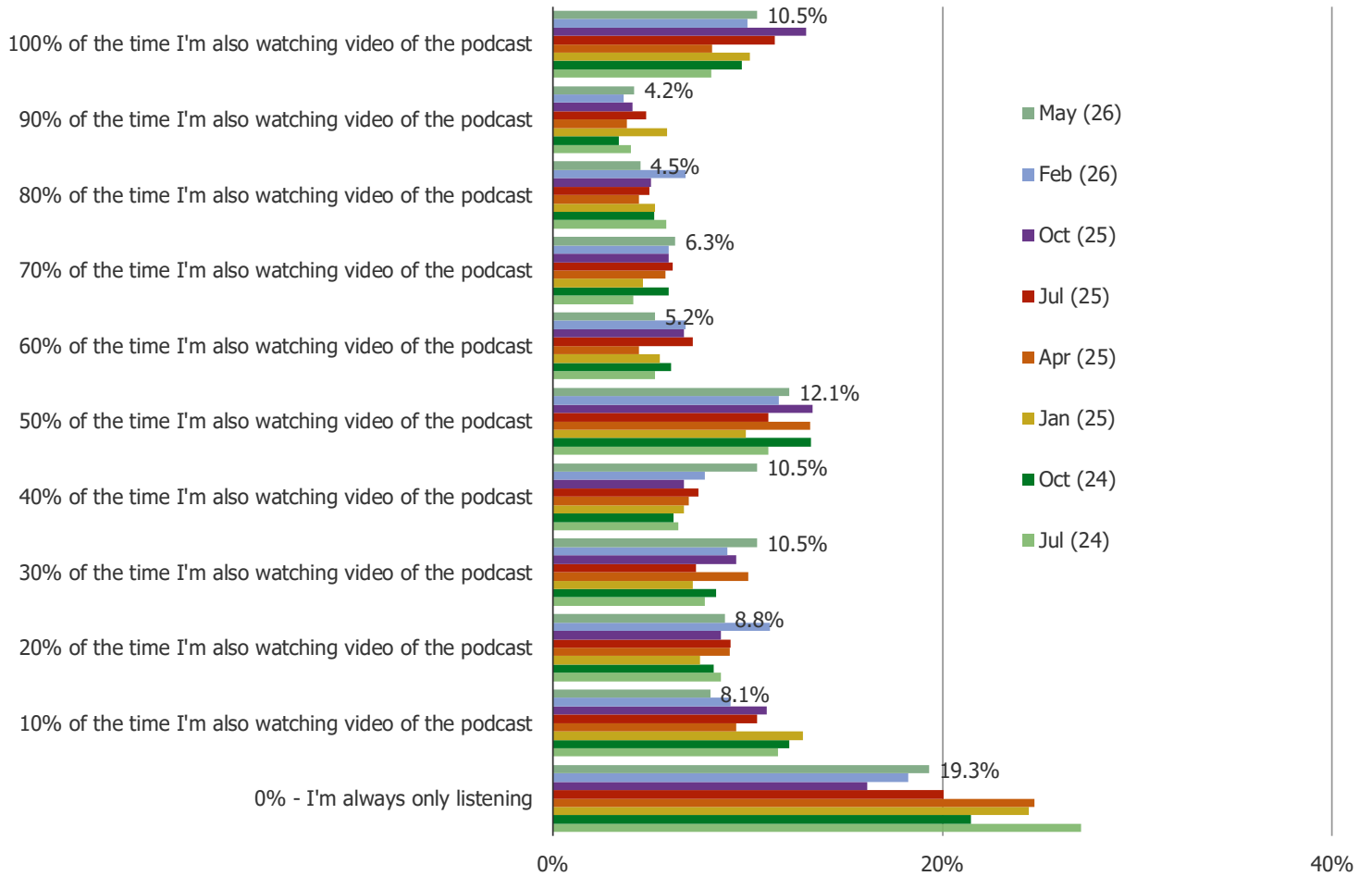
- Multitasking (driving, cleaning, working)
- Mobility/convenience
- Background listening
- Work restrictions

Video Preferences:

- Seeing facial expressions/reactions
- Visual learning/retention
- Additional content/context
- Body language understanding

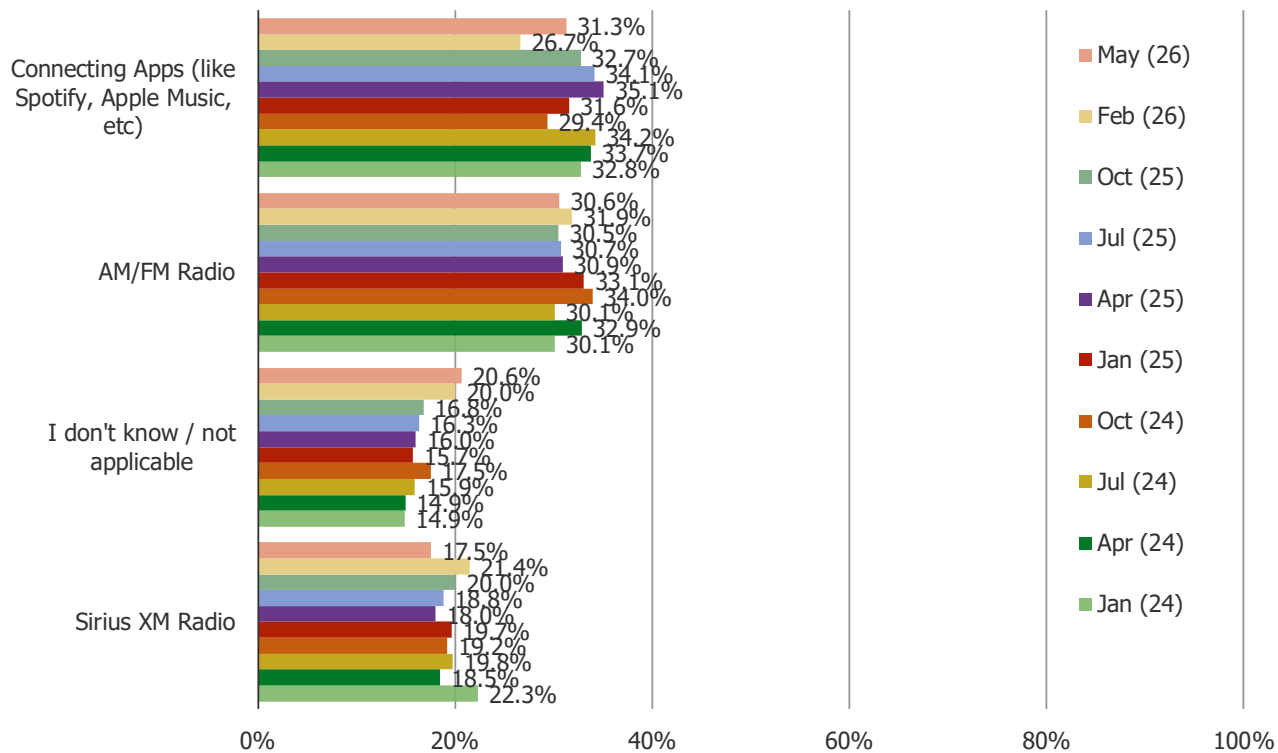
WHAT PERCENTAGE OF THE TIME THAT YOU ARE LISTENING TO PODCASTS ARE YOU WATCHING VIDEO OF THE PODCAST?

Posed to all respondents who listen to podcasts.

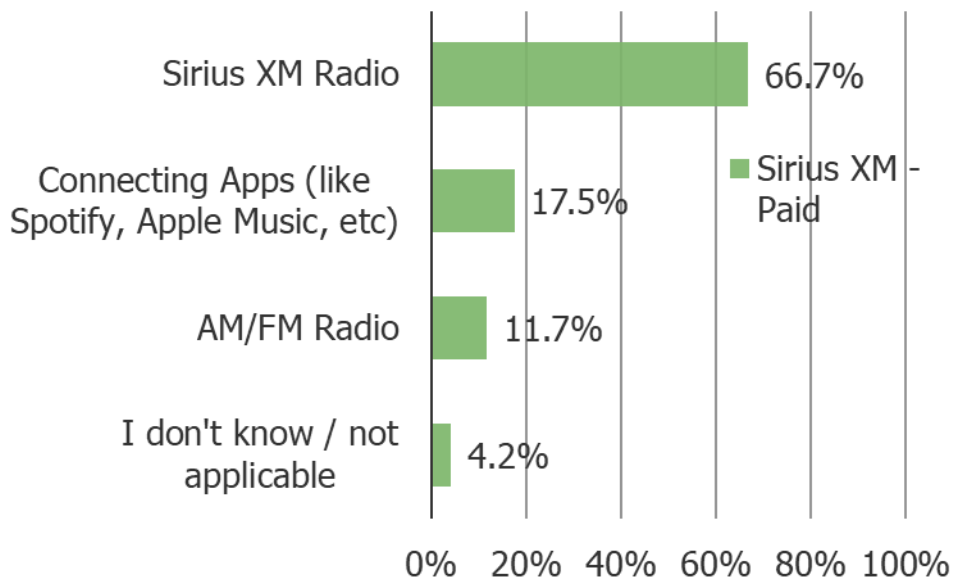


IN YOUR OPINION, WHICH IS BEST FOR LISTENING IN THE CAR?

Posed to all respondents.



Posed to paid Sirius XM users (May 26).



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.

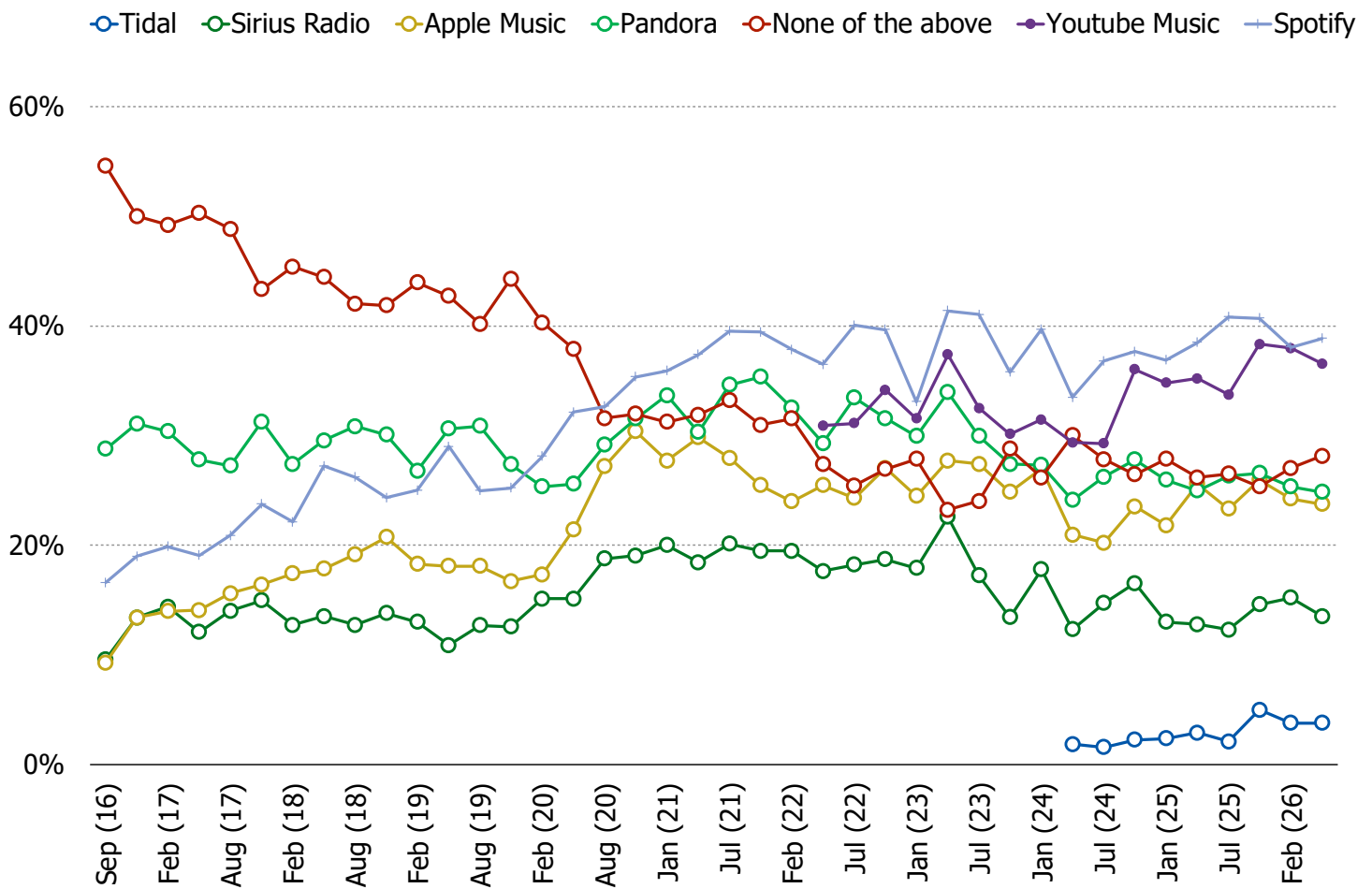
Here is the quantified breakdown of what drives your respondents' choices regarding audio streaming platforms:

- **Variety, Content Selection & Library Size: 27.1%**
(e.g., "Huge selection of songs", "The variety of music and podcasts", "Availability of my favorite artists", "Lots of choices")
- **Other / Unclassified (Ambiguous or highly unique responses): 23.4%**
(e.g., "They allow you to choose", "Rate of usage", "Enjoying them", "Being safe")
- **Price, Cost & Value: 16.8%**
(e.g., "It's free", "Price", "Affordability", "Cheapest premium subscription")
- **Ease of Use, Features & Convenience: 8.8%**
(e.g., "Ease of use", "Simple to navigate", "Fast and accessible", "Ability to skip easily")
- **Irrelevant / No Answer / Don't Stream: 6.9%**
(e.g., "N/A", "Idk", "Nothing", "Good music" [too vague], "I don't stream")
- **Ad-Free / Limited Interruptions: 5.7%**
(e.g., "No ads", "Ad-free experience", "No commercials")
- **Audio/Stream Quality & Reliability: 5.4%**
(e.g., "Sound quality", "High fidelity", "Doesn't buffer")
- **Specific Platform, Brand Trust or Familiarity: 4.3%**
(e.g., "I just use Spotify", "Familiarity", "Brand reputation", "Apple Music")
- **Playlists, Discovery & Personalization: 1.3%**
(e.g., "Curated playlists", "Good recommendations", "Algorithm knows what I like")
- **Offline Listening / Downloads: 0.2%**
(e.g., "Offline capabilities", "Can listen without WiFi")

COMPETITIVE DYNAMICS, STREAMING APPS

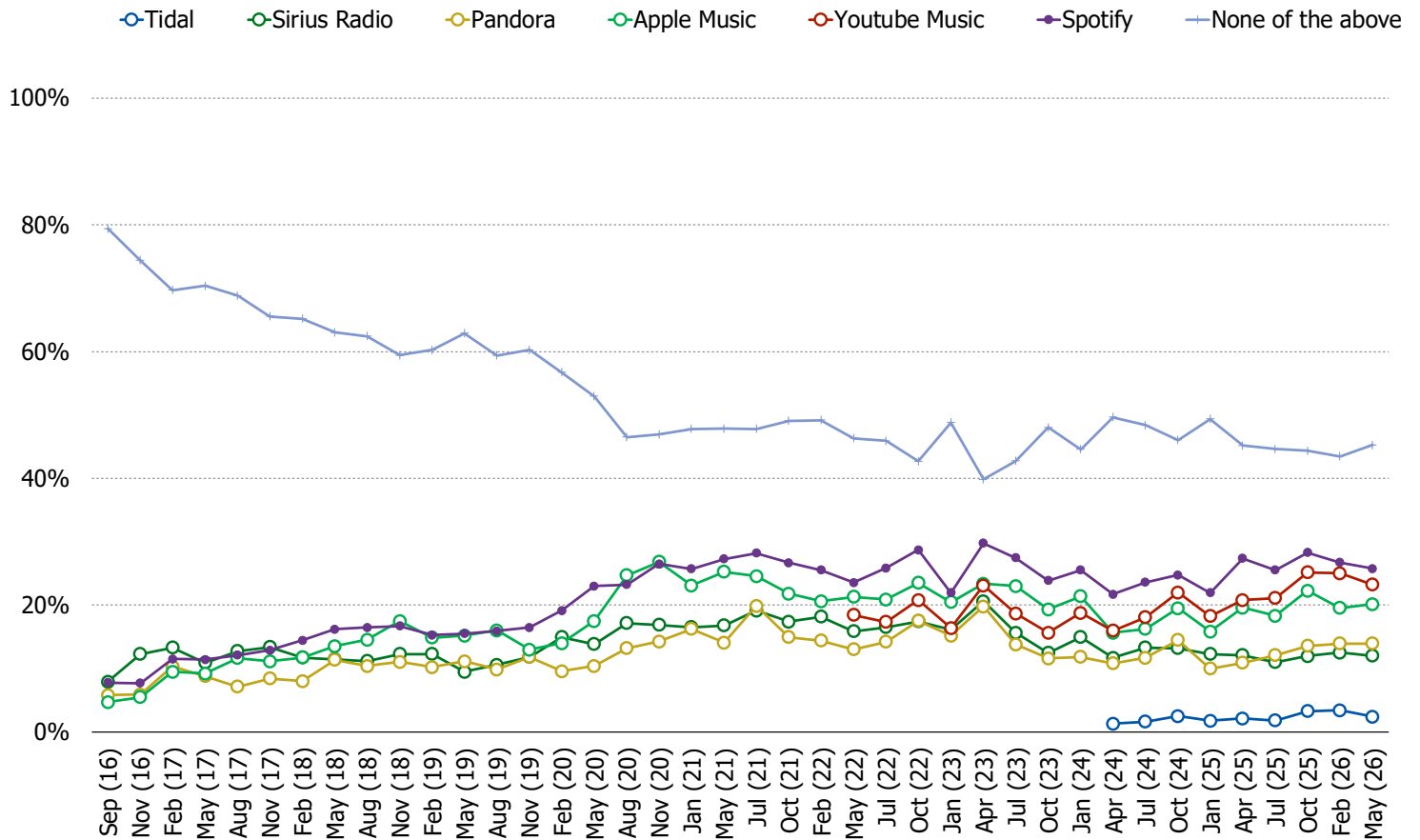
QUARTERLY SURVEY: DO YOU HAVE AN ACCOUNT WITH ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.



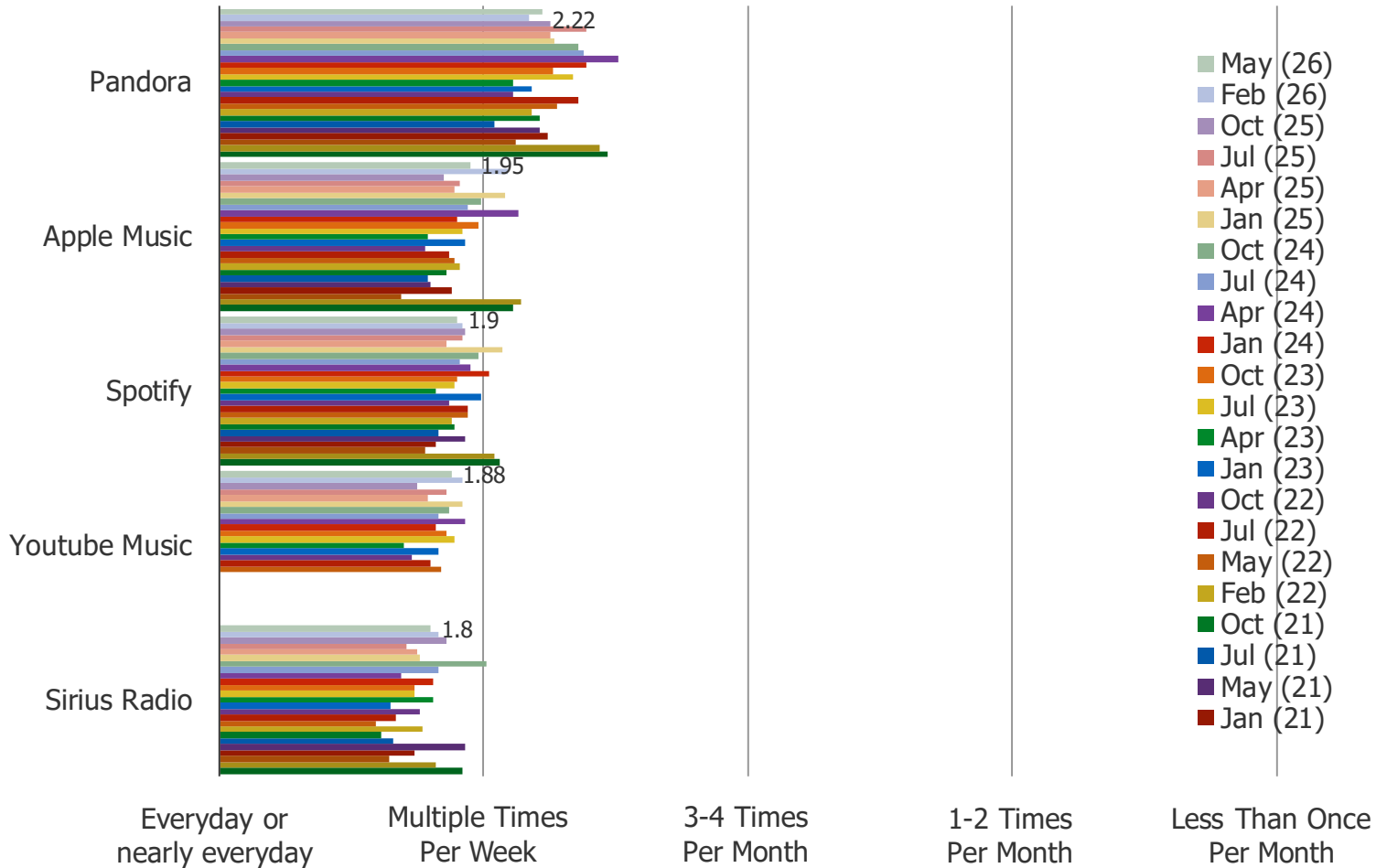
QUARTERLY SURVEY: ARE YOU CURRENTLY PAYING FOR A SUBSCRIPTION WITH ANY OF THE FOLLOWING?
(SELECT ALL THAT APPLY)

Posed to all respondents.



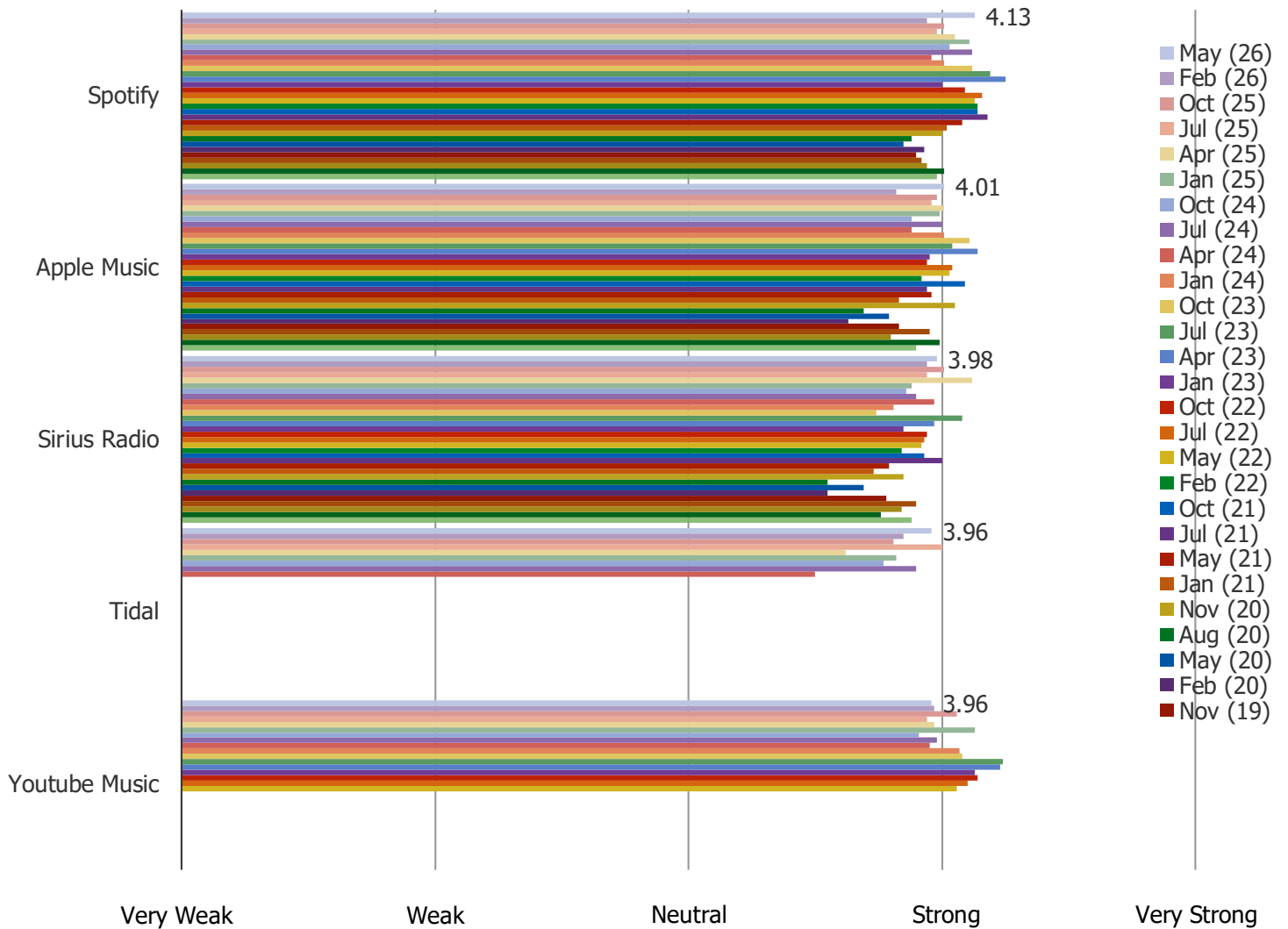
HOW OFTEN DO YOU USE THE FOLLOWING?

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



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

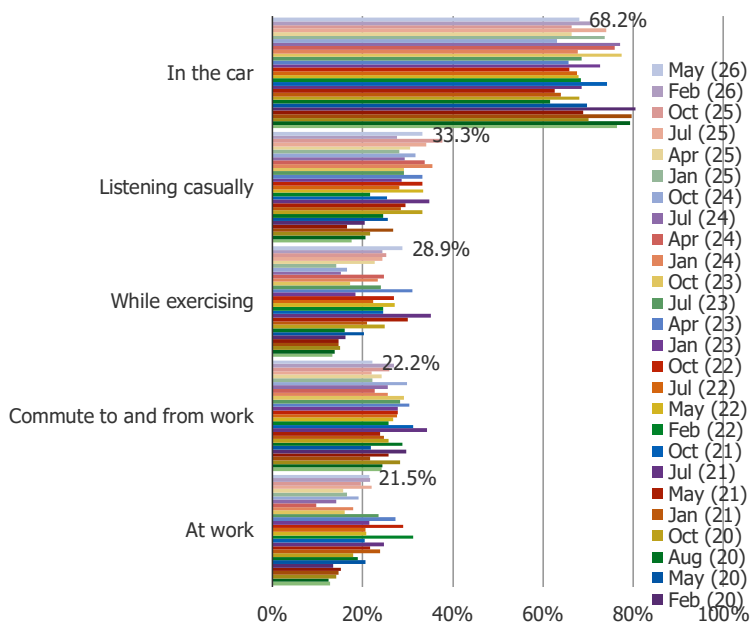
Respondents who pay for each platform



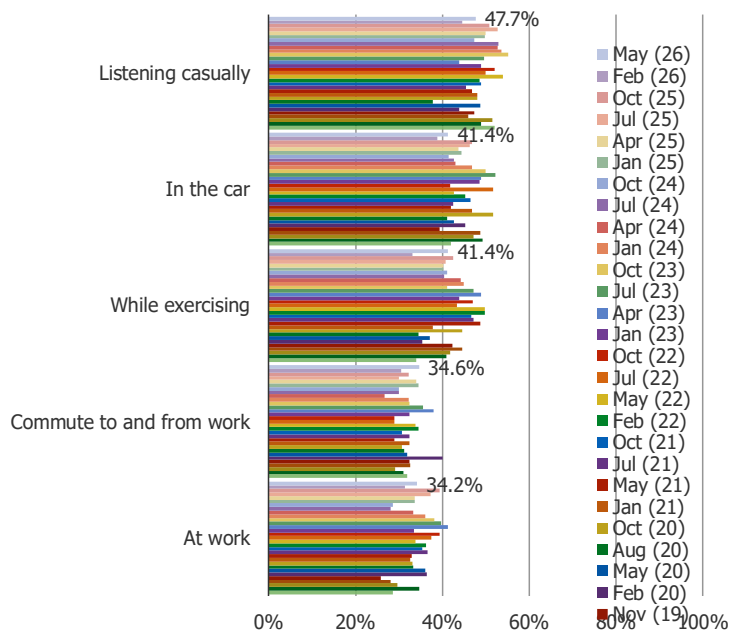
WHERE DO YOU TYPICALLY LISTEN TO THIS PLATFORM? (SELECT ALL THAT APPLY)

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

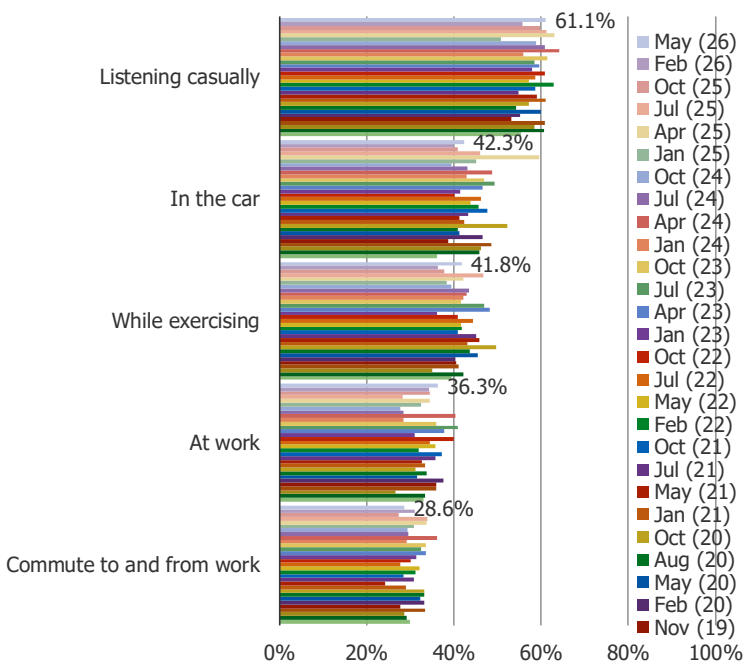
SIRIUS XM



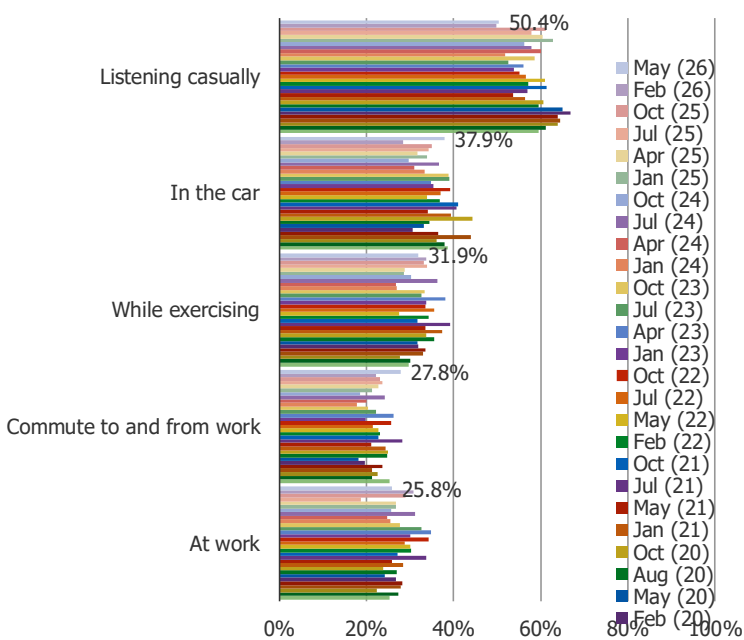
APPLE MUSIC



SPOTIFY

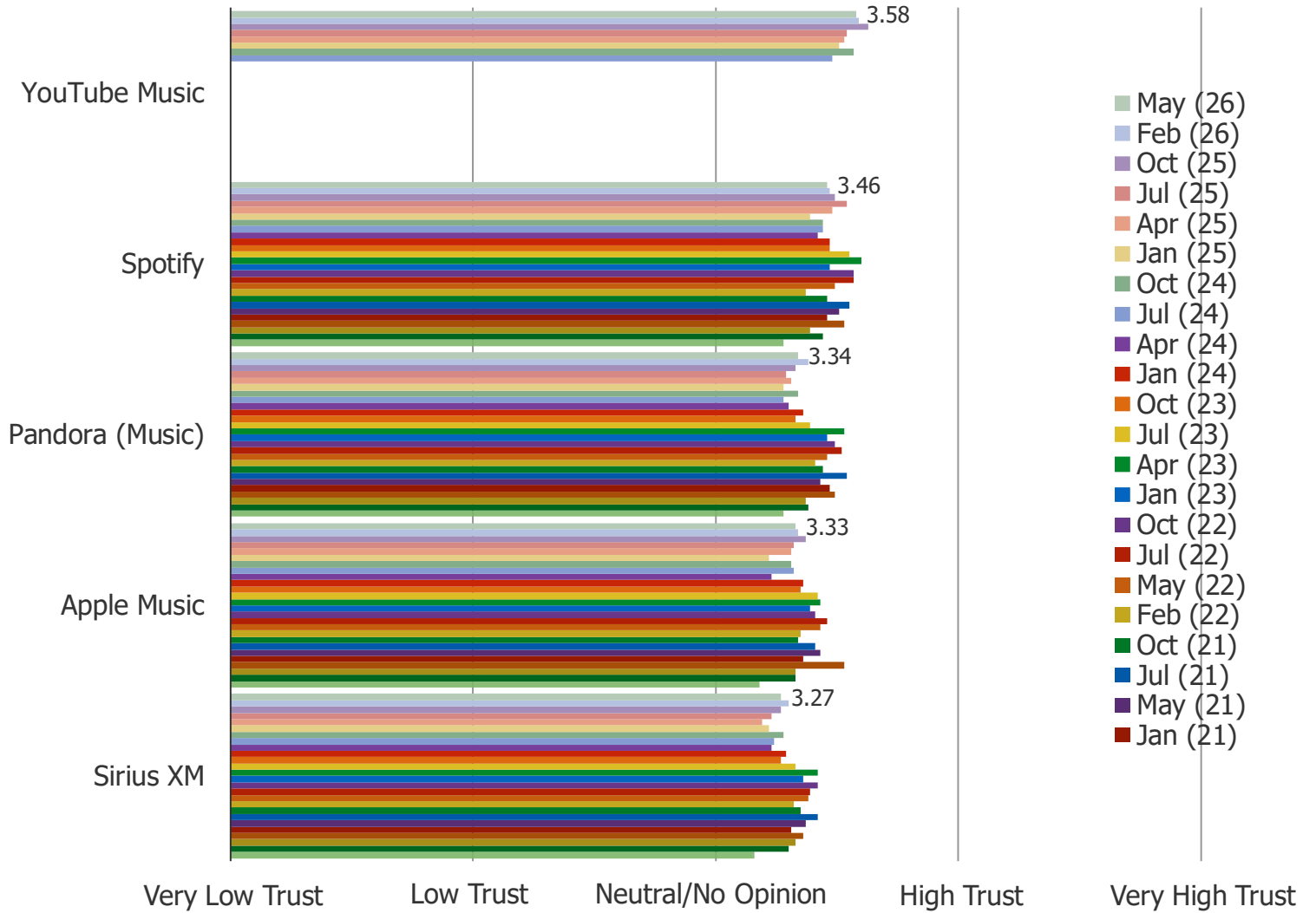


PANDORA



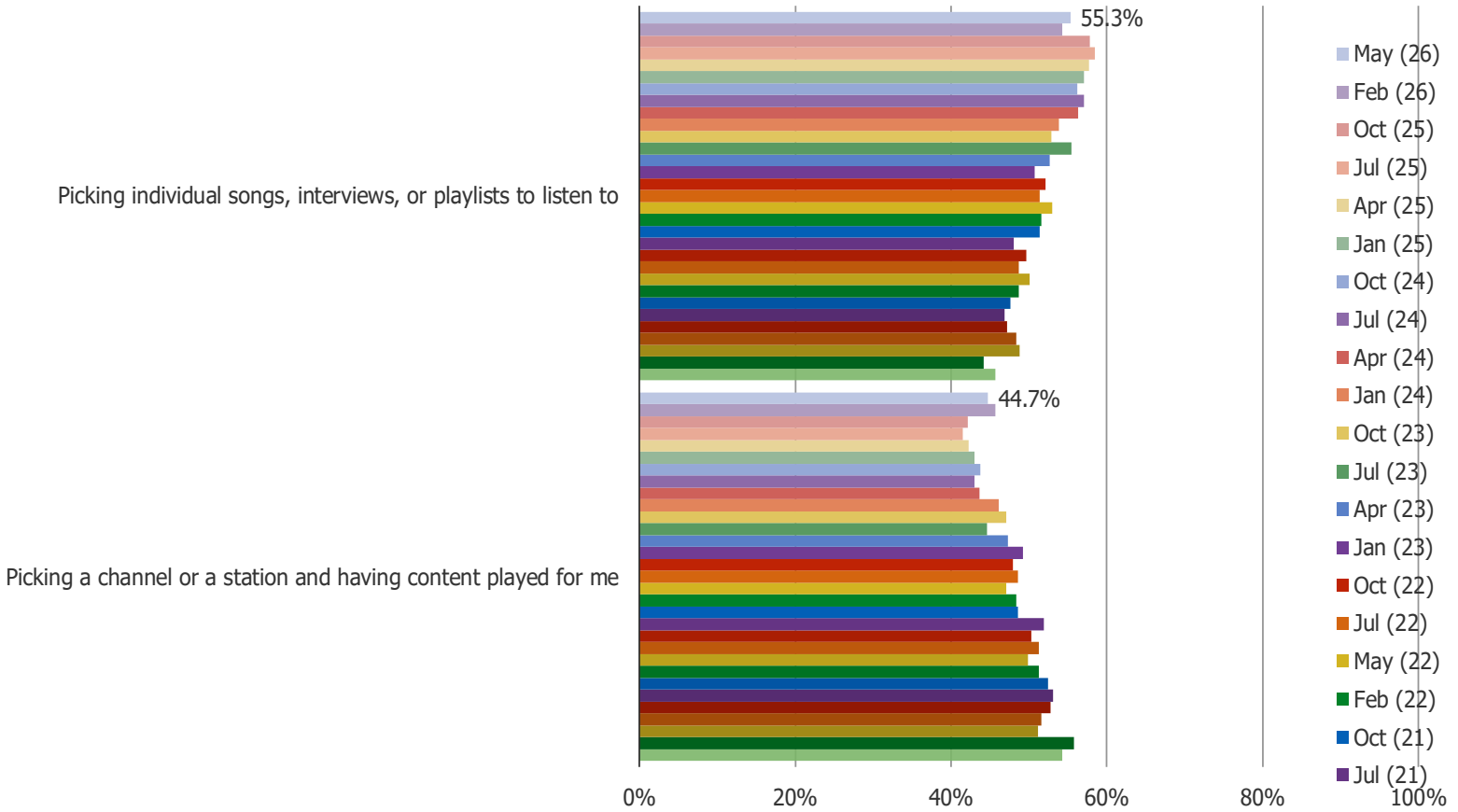
HOW MUCH TRUST WOULD YOU SAY YOU HAVE IN THE FOLLOWING BRANDS?

Posed to all respondents



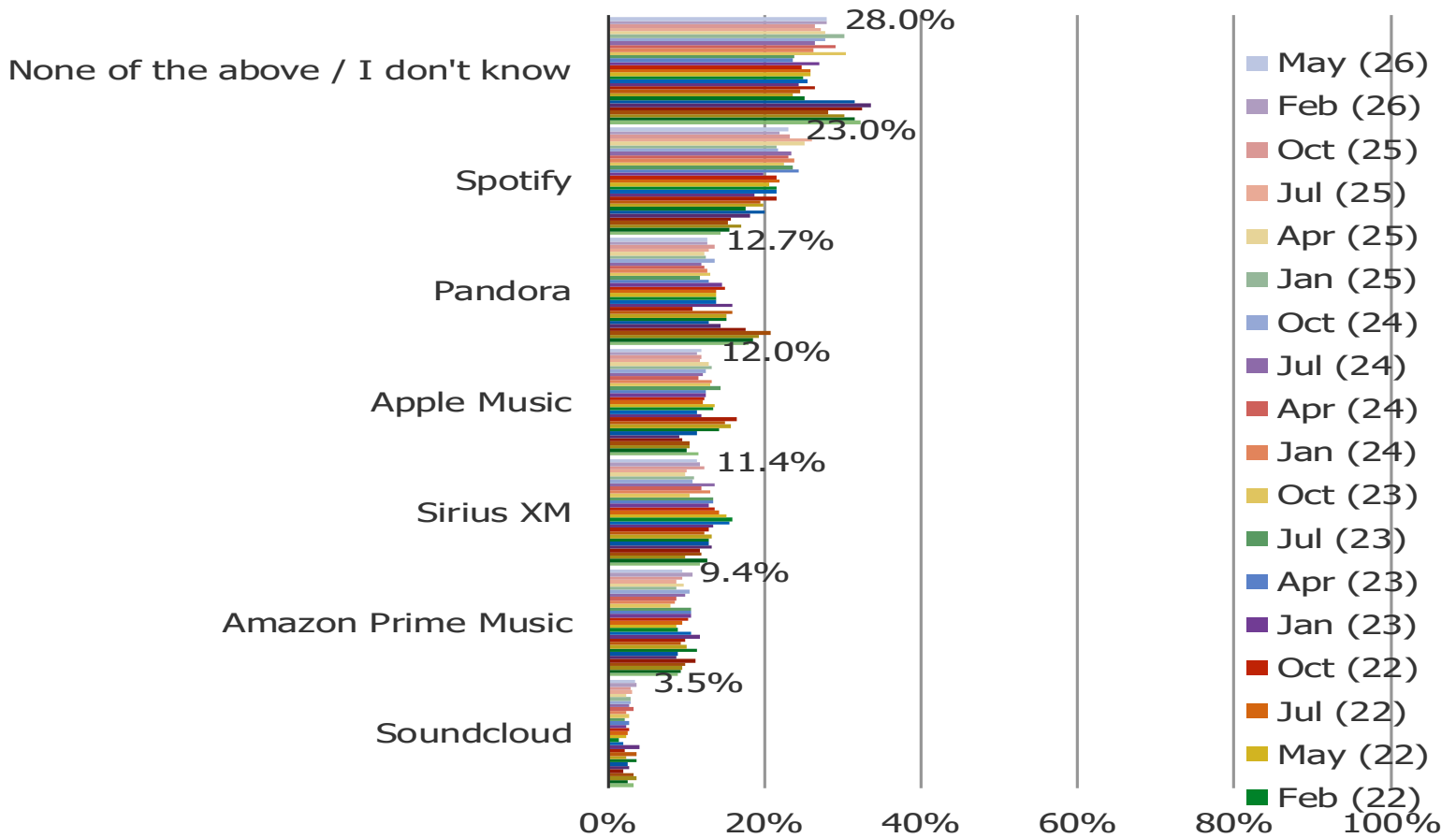
FOR LISTENING TO MUSIC AND TALK-SHOW CONTENT, WHICH IS BETTER?

Posed to all respondents.



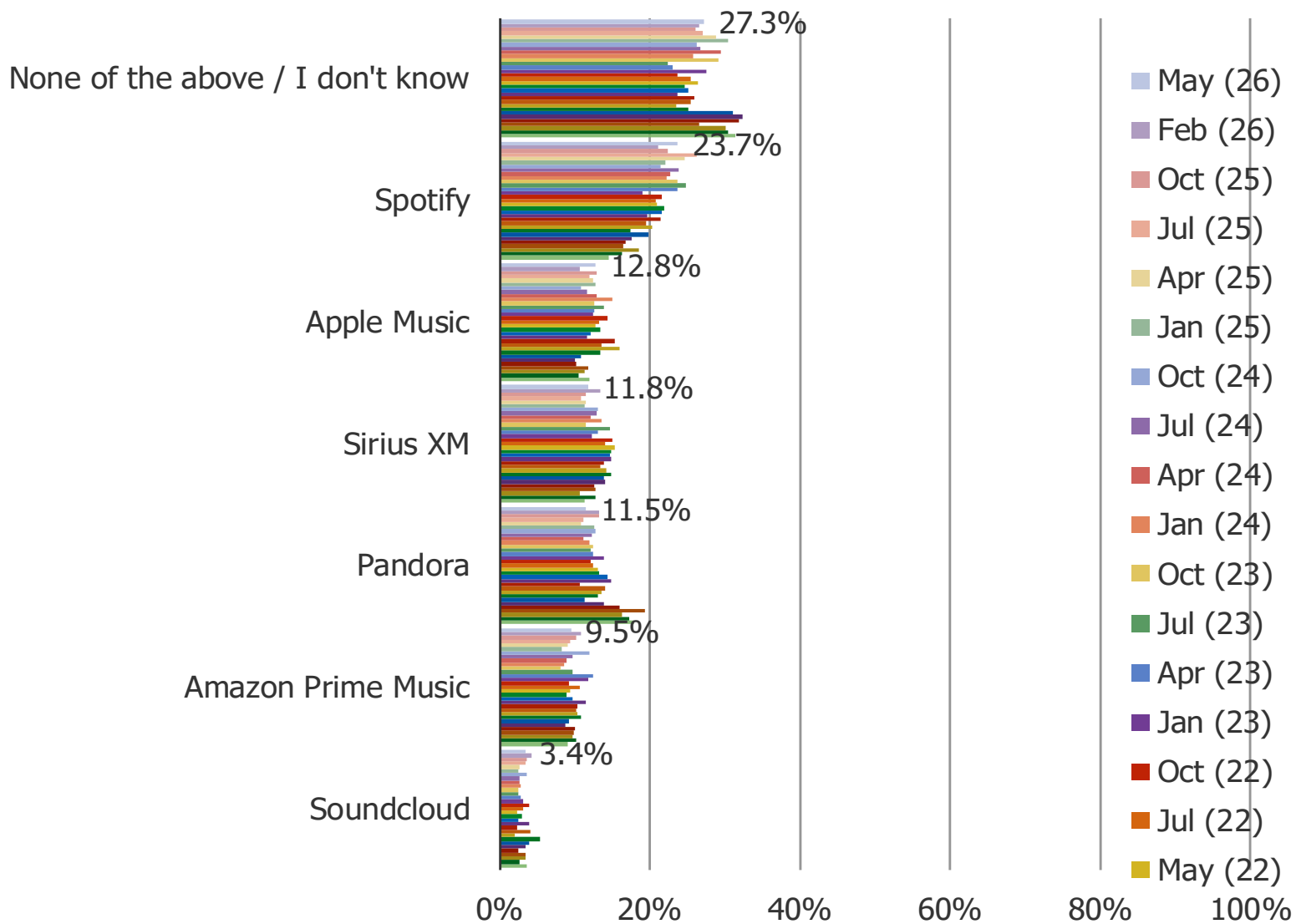
IN YOUR OPINION, WHICH PLATFORM IS BEST WHEN IT COMES TO THE WAY IN WHICH THEY DELIVER CONTENT TO ITS USERS? (IE. THE BEST USER EXPERIENCE)

Posed to all respondents.



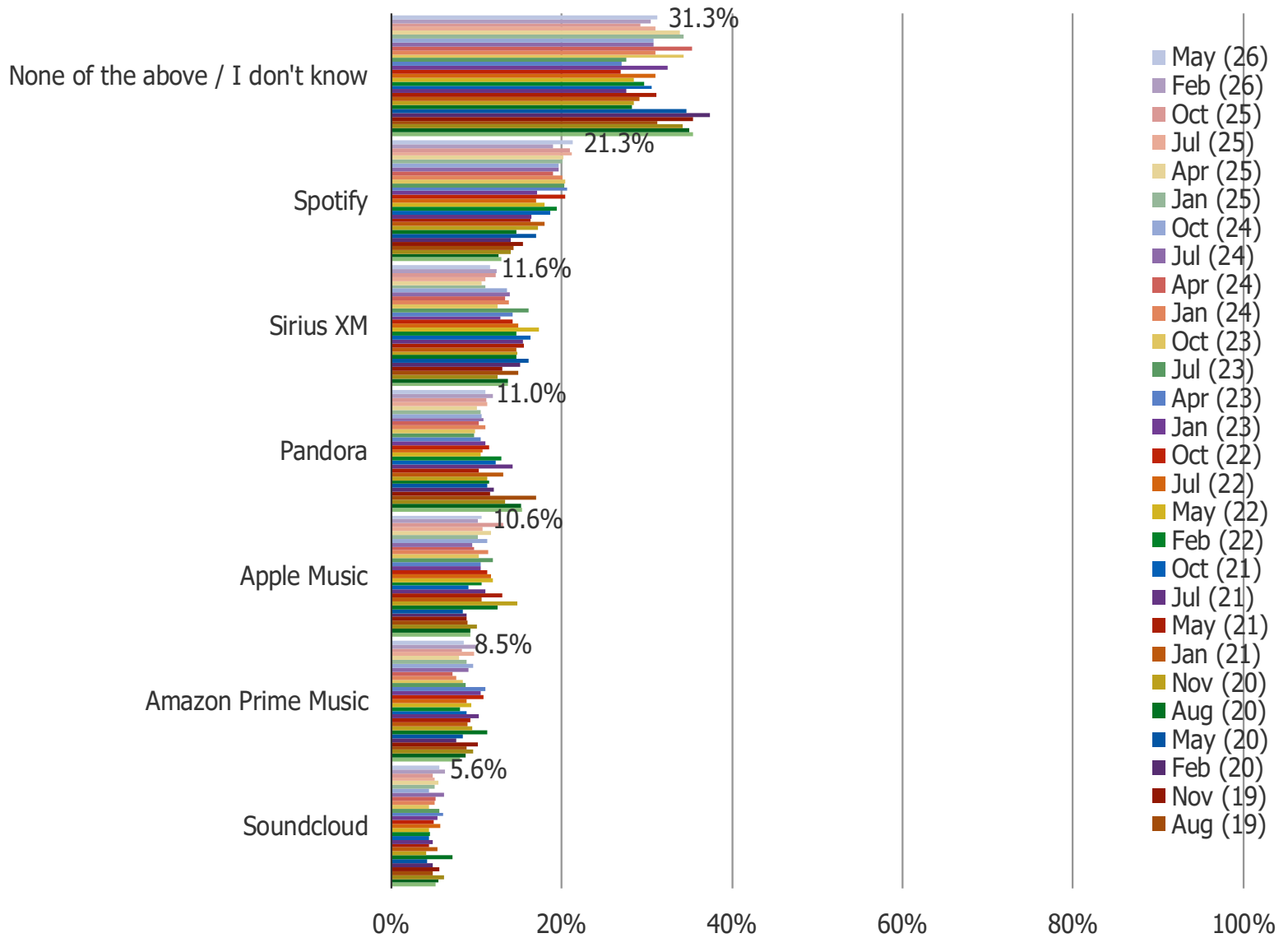
IN YOUR OPINION, WHICH PLATFORM HAS THE BEST CONTENT AVAILABLE?

Posed to all respondents.



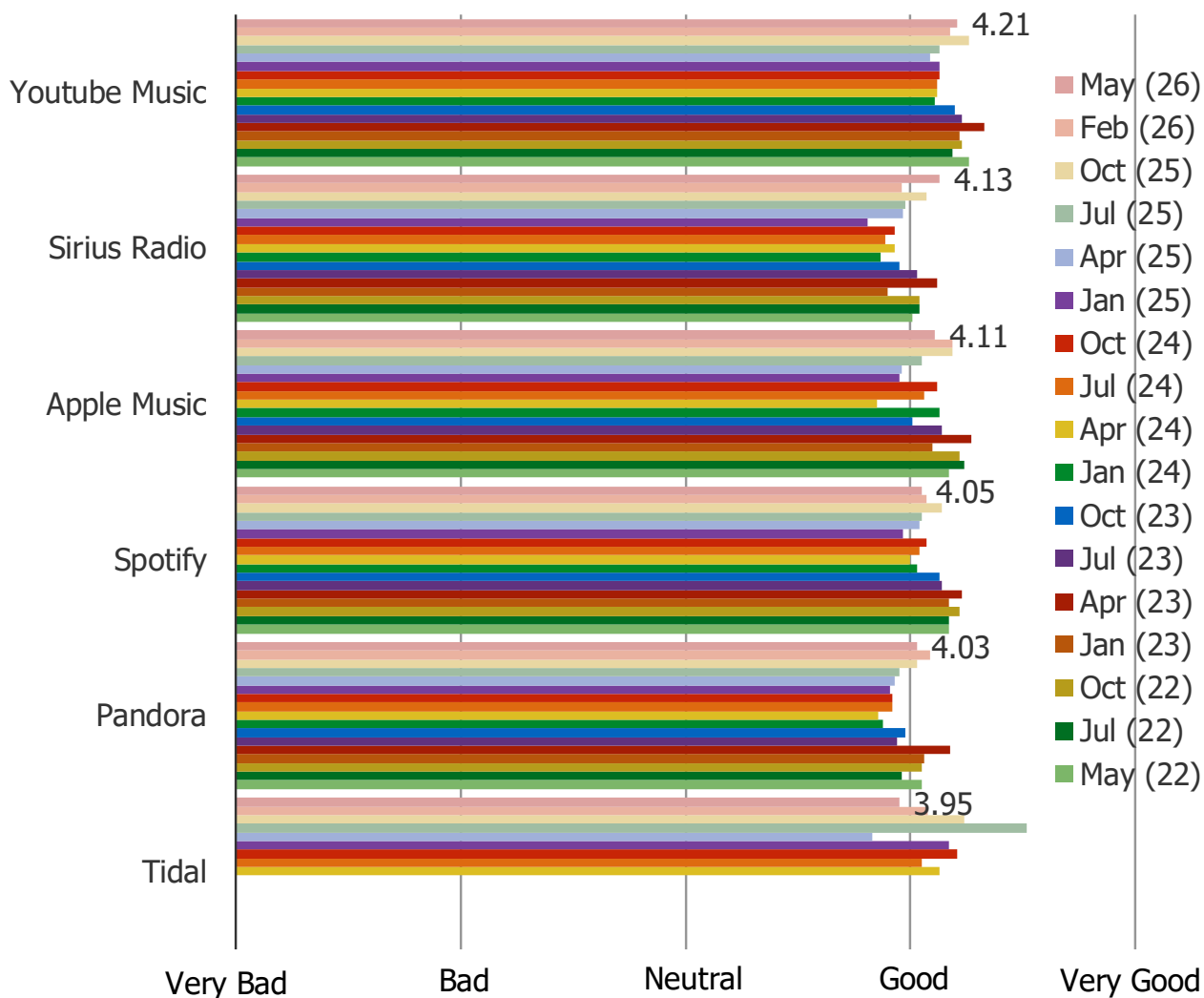
IN YOUR OPINION, WHICH PLATFORM HAS THE MOST UNIQUE CONTENT AVAILABLE THAT YOU CAN'T FIND ANYWHERE ELSE?

Posed to all respondents.



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

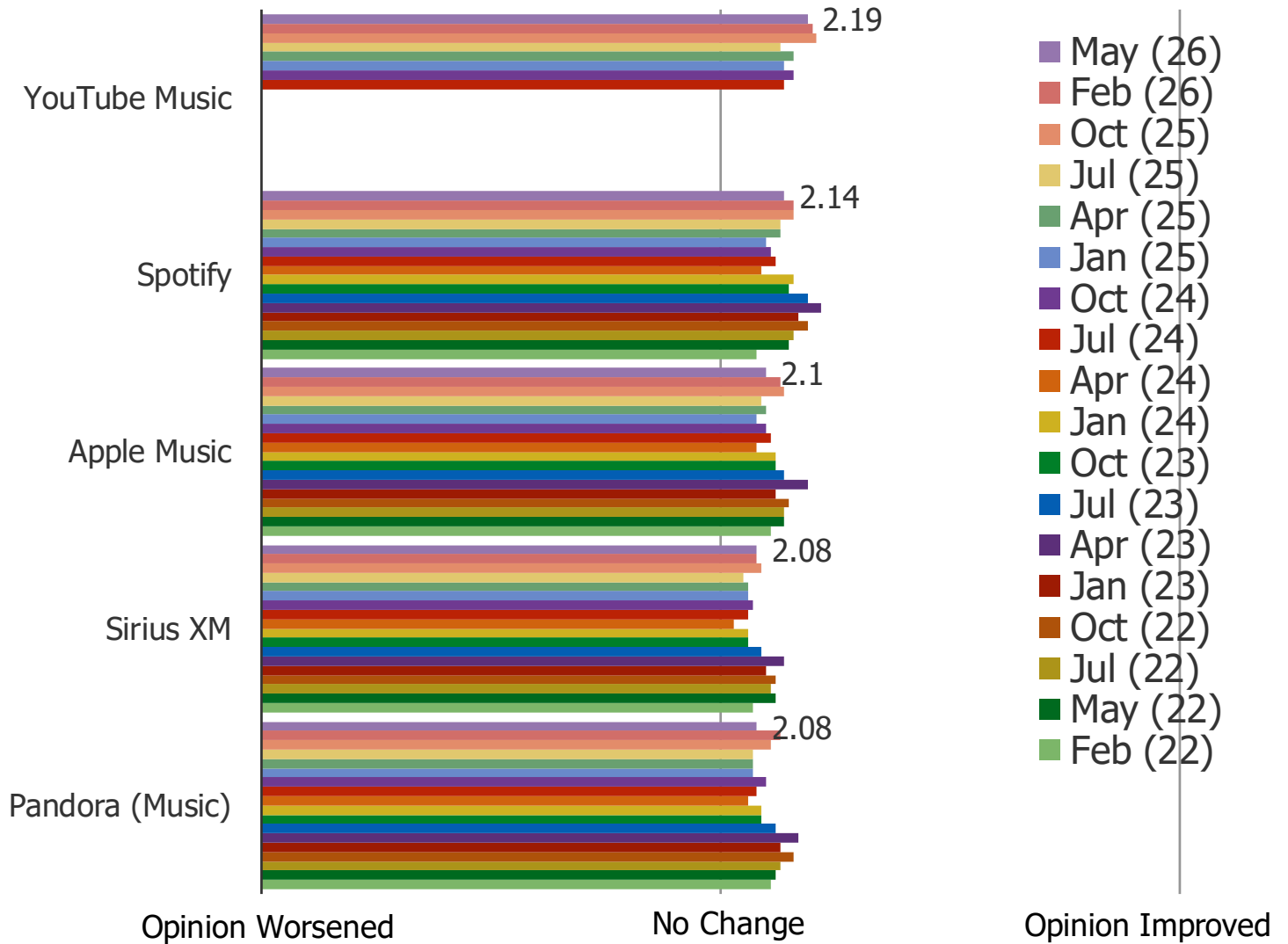
Posed to users of each of the following.



	N=
Sirius Radio	135
Apple Music	237
Spotify	388
Pandora	248
Youtube Music	365
Tidal	38

HAS YOUR OPINION OF ANY OF THE FOLLOWING CHANGED RECENTLY?

Posed to all respondents.



HAS YOUR OPINION OF ANY OF THE FOLLOWING CHANGED RECENTLY? OPTIONAL COMMENTS
SUMMARIZED

For Spotify, recent opinion changes lean positive, primarily driven by app updates and music discovery, though rising costs and ads are beginning to frustrate users.

- **Positive - Audio Quality & UI Updates (~47%):** Users noted that the app has improved its features, stability, and sound quality. Many specifically praised the algorithm for improving playlists and recommendations.
- **Negative - Price Increases (~18%):** Several users mentioned recent subscription price hikes as a reason their opinion soured.
- **Negative - Locking Features (~6%):** A notable subset of free-tier users complained about "too many ads" and Spotify locking previously free features behind the premium paywall.

Apple Music is experiencing a polarized shift. While the technology is improving, the cost is driving people away.

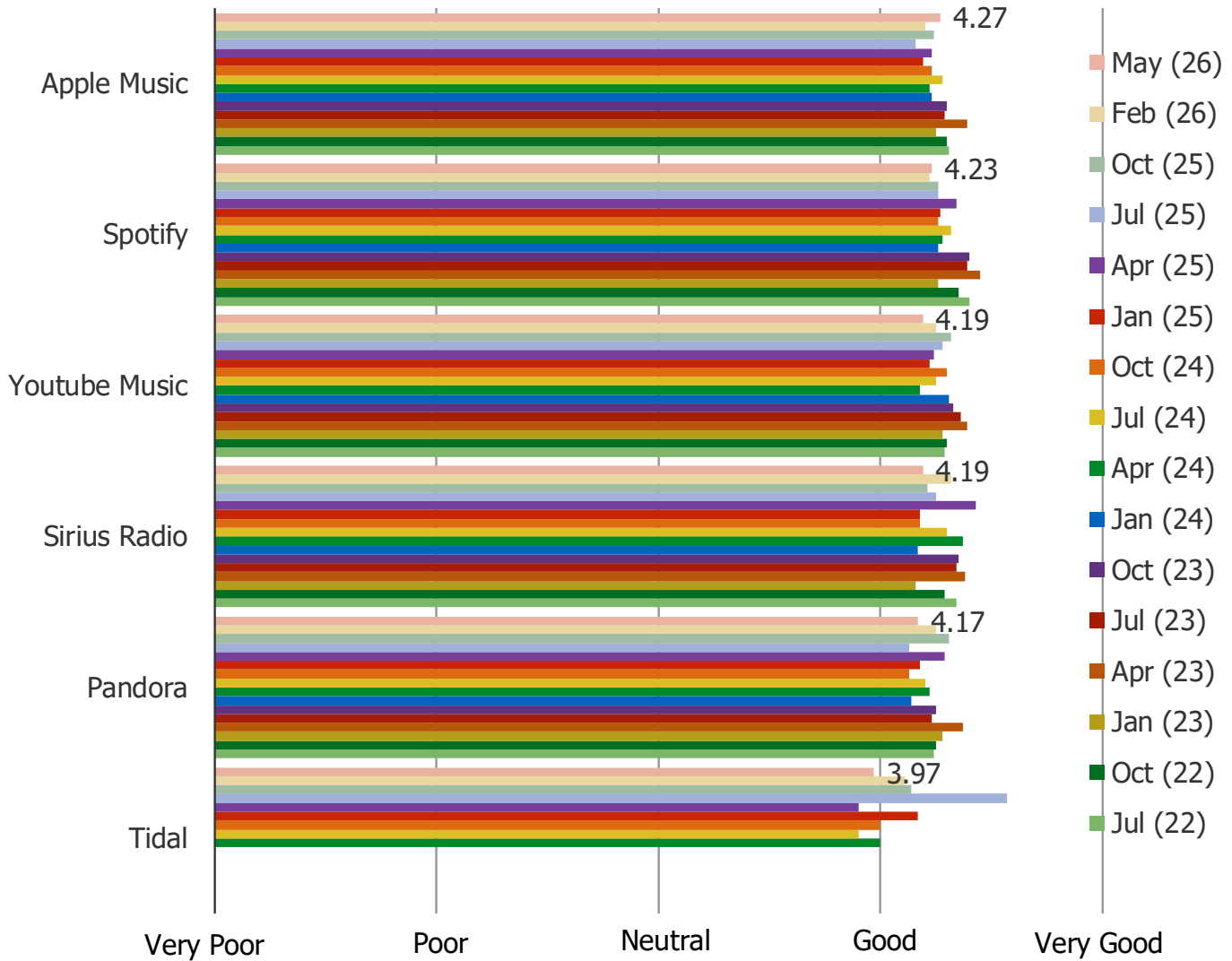
- **Negative - Too Expensive (~29%):** Cost is the #1 driver of recent opinion changes for Apple Music. Users explicitly mentioned that the platform "has gotten to cost too much."
- **Positive - Sound Quality & Features (~40%):** On the positive side, those whose opinions improved cited noticeably better sound quality (likely tied to their lossless audio rollout) and updates to the app interface that make it "more enjoyable to use."

Sirius XM's opinion shifts are heavily tied to its content curation, though its pricing model remains a massive hurdle.

- **Positive - Variety & Curated Content (~38%):** Users whose opinions improved noted that the curated stations and variety have felt "more useful lately, especially for longer drives."
- **Negative - Price & Value (~19%):** A significant chunk of users reported a negative shift because Sirius is "just too expensive and doesn't even offer that much."
- **Negative - Repetitive / Trust Issues (~11%):** Some users complained that the stations play the exact same loops of music, reducing the perceived value.

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

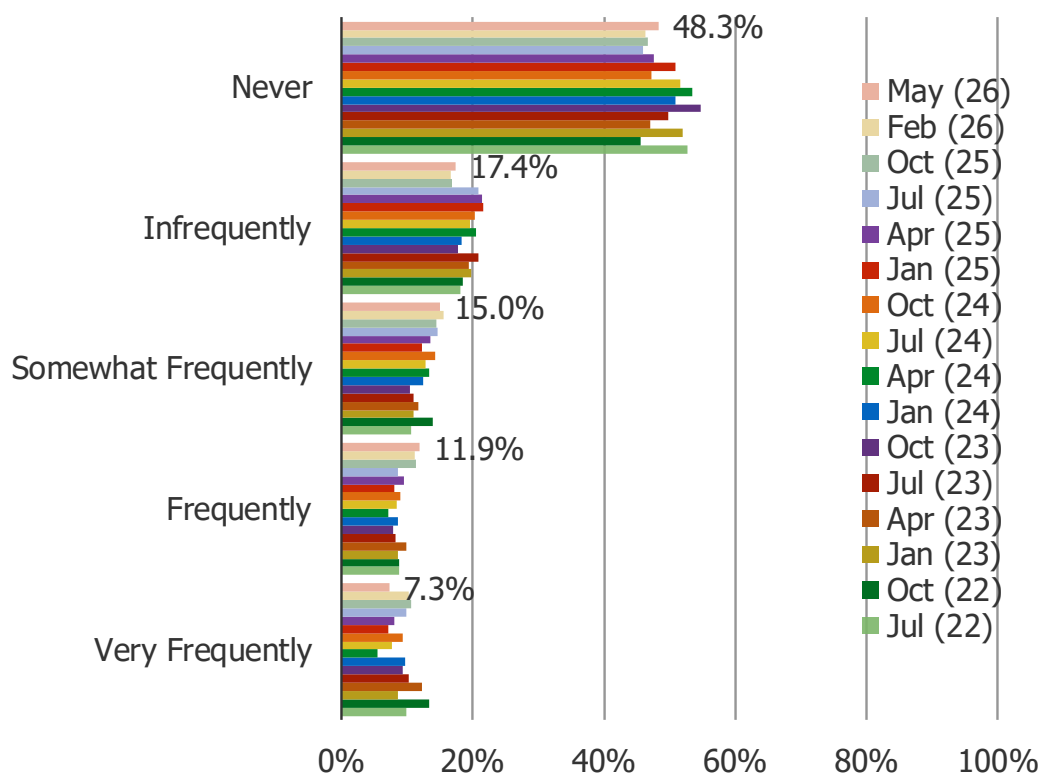
Posed to users of each of the following.



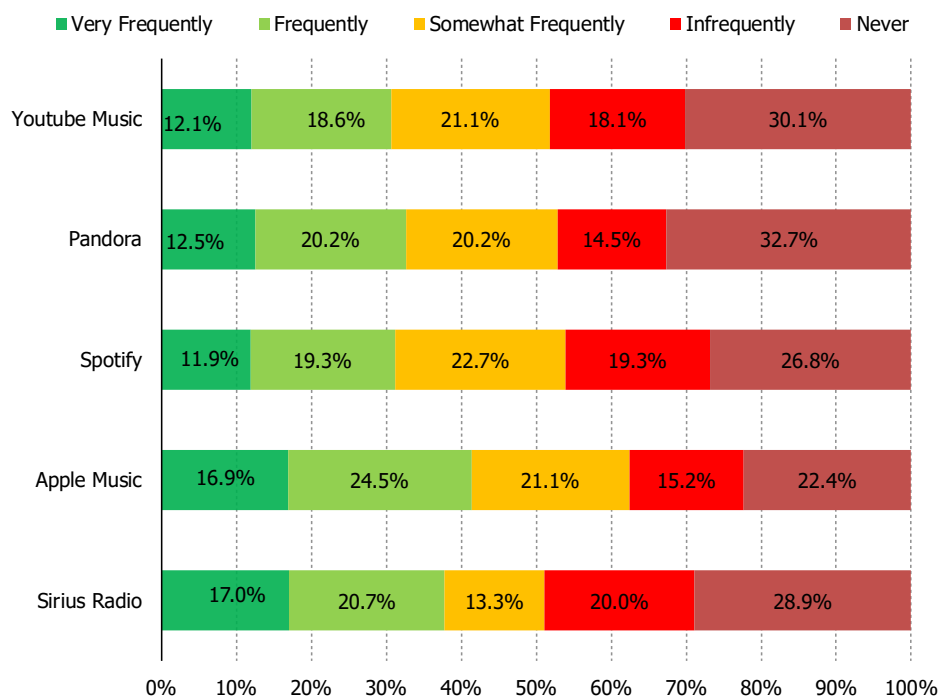
	N=
Sirius Radio	135
Apple Music	237
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Youtube Music	365
Tidal	38

HOW OFTEN DO YOU LISTEN TO AUDIOBOOKS?

Posed to all respondents.

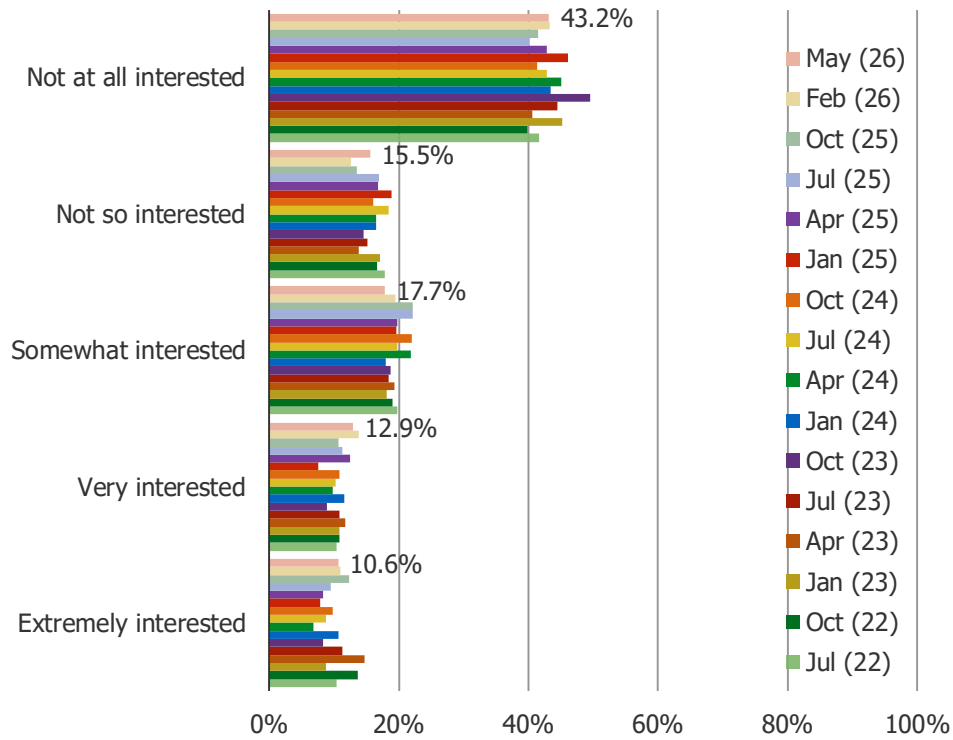


Cross-Tab Analysis: How often users of the following listen to audiobooks in general

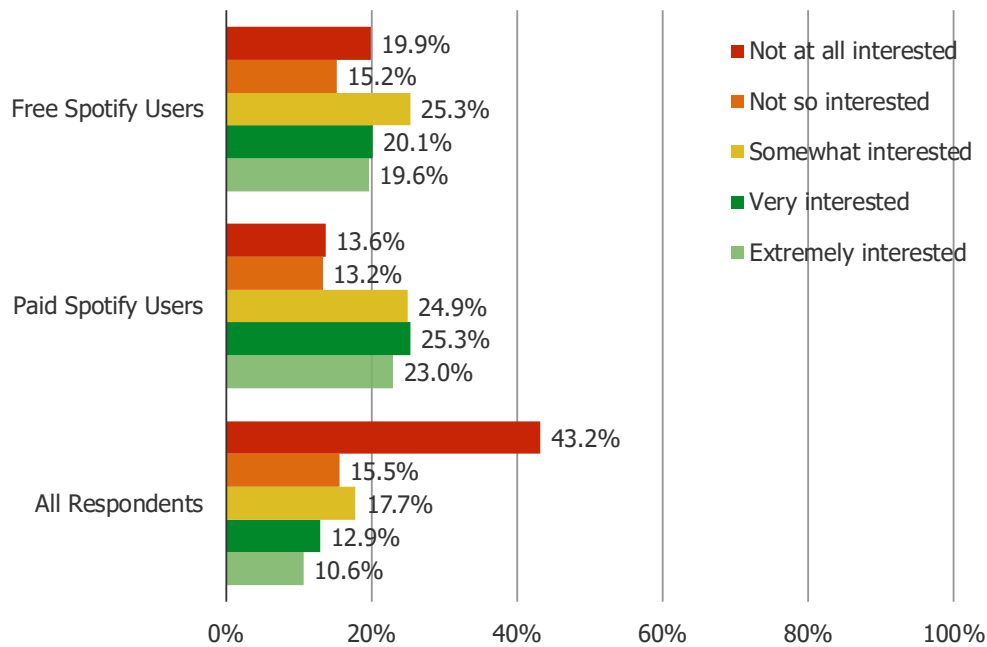


PLEASE EVALUATE YOUR INTEREST LEVEL IN BEING ABLE TO LISTEN AUDIOBOOKS ON SPOTIFY?

Posed to all respondents



Posed to all respondents (Cross-tabbed).



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

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

Spotify is the undisputed leader for music, but the landscape is heavily fragmented with YouTube, Pandora, and Apple all taking significant shares.

- **Spotify:** 23.7%
- **YouTube / Google:** 16.0%
- **Other / Unclassified (Highly unique responses):** 11.4%
- **Pandora:** 10.4%
- **Apple (Music, iTunes):** 9.2%
- **Generic Genre / Media Type (e.g., "Rock", "Country"):** 7.9%
- **iHeartRadio / NPR / Traditional Radio:** 6.7%
- **Amazon / Alexa:** 5.2%
- **Irrelevant / No Answer / Noise:** 4.8%
- **SiriusXM:** 2.8%

(The remaining ~1.8% belong to Niche Platforms like Tidal/Audiomack and SoundCloud).

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

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

Spotify and YouTube are virtually tied for the top-of-mind podcast platform, while Apple trails significantly behind its competitors.

- **Other / Unclassified (e.g., specific show names like Joe Rogan): 24.6%**
- **Spotify: 19.4%**
- **YouTube / Google: 19.2%**
- **Apple (Podcasts, iTunes): 11.1%**
- **Irrelevant / No Answer / Noise: 7.6%**
- **Amazon / Audible: 4.9%**
- **Generic Genre (e.g., "True Crime", "Comedy"): 4.6%**
- **iHeartRadio / NPR / Traditional Radio: 3.3%**
- **Pandora: 1.7%**
- **Social / Video Platforms (Facebook, TikTok): 1.5%**

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

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

Amazon completely dominates the audiobook space (driven heavily by Audible). No other platform comes close to its top-of-mind awareness for this format.

- **Amazon / Audible / Kindle: 34.4%**
- **Other / Unclassified (e.g., specific book titles): 24.4%**
- **Irrelevant / No Answer / Noise: 9.9%**
- **YouTube / Google: 7.0%**
- **Generic Genre (e.g., "Mystery", "Romance"): 6.3%**
- **Spotify: 6.0%**
- **Apple (Podcasts, iTunes): 4.8%**
- **Library Apps (Libby, Hoopla, Overdrive): 3.2%**

(The remaining ~4% is scattered across Radio, Pandora, and Social media platforms).

WHAT DO YOU VALUE MOST ABOUT THIS PLATFORM?

Posed to account holders of each of the following platforms.

Spotify

People value Spotify for its frictionless interface and its algorithm.

- **Variety & Selection (Music/Podcasts):** 41.5% (1,611 mentions)
- **Ease of Use, Interface & Search:** 12.4% (483 mentions)
- **Playlists, Discovery & Algorithms:** 11.9% (462 mentions)

WHAT DO YOU VALUE MOST ABOUT THIS PLATFORM?

Posed to account holders of each of the following platforms.

YouTube Music

YouTube Music is unique because its value is heavily tied to its cost (the free tier) and its video ecosystem.

- **Variety & Selection:** 39.1% (1,272 mentions)
- **Price, Cost & Free Tier:** 12.5% (406 mentions)
- **Specific Content (Videos, Podcasts):** 12.2% (396 mentions)

WHAT DO YOU VALUE MOST ABOUT THIS PLATFORM?

Posed to account holders of each of the following platforms.

Apple Music

Apple Music users place a much heavier premium on audio quality and the integration/interface compared to Spotify users.

- **Variety & Selection:** 36.5% (798 mentions)
- **Audio/Sound Quality:** 20.8% (454 mentions)
- **Ease of Use & Interface:** 15.1% (330 mentions)

WHAT DO YOU VALUE MOST ABOUT THIS PLATFORM?

Posed to account holders of each of the following platforms.

Sirius XM

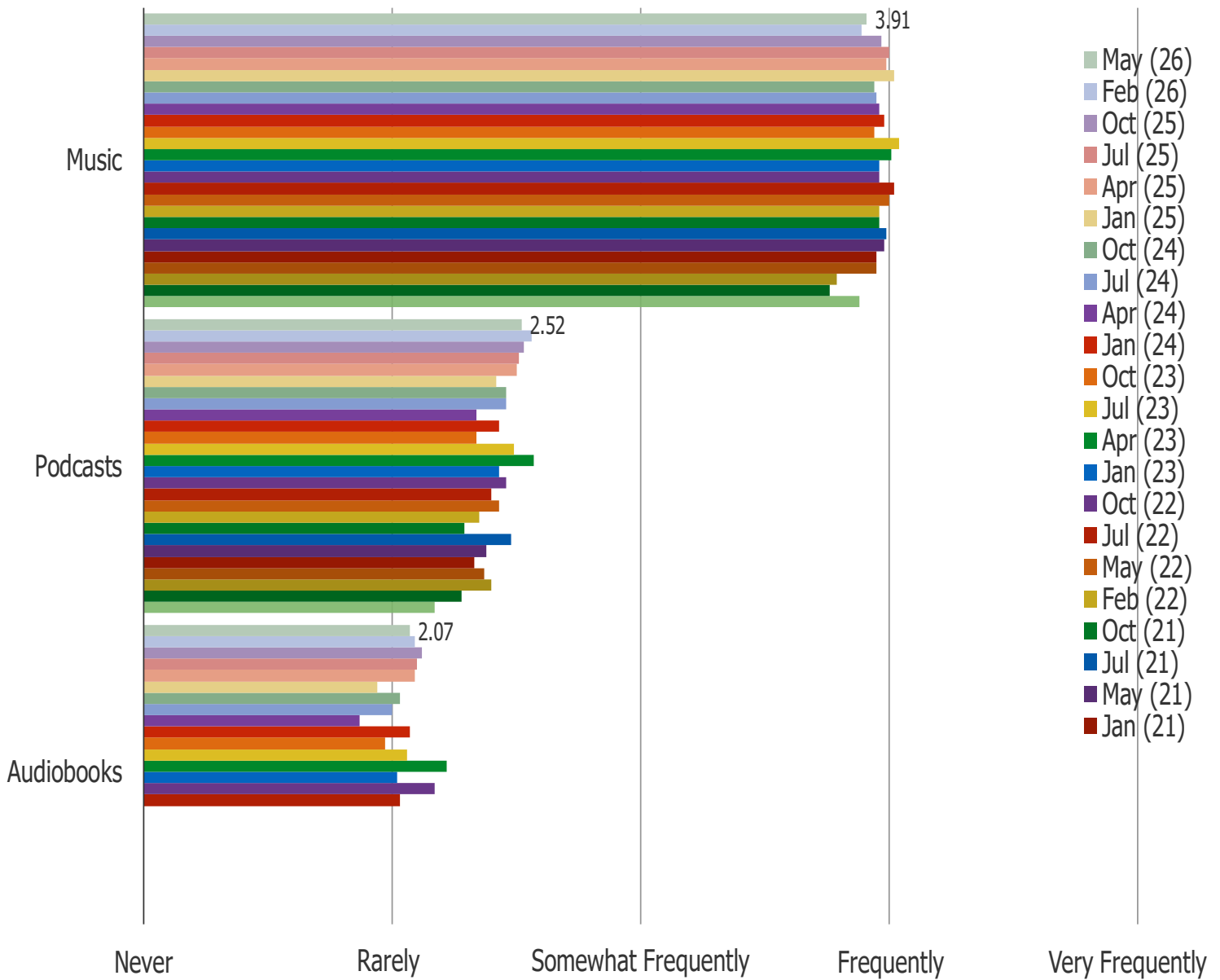
Sirius users care less about the interface and more about the curation and audio reliability (likely tied to in-car listening).

- **Variety & Selection:** 52.0% (785 mentions)
- **Audio/Sound Quality & Reliability:** 12.5% (188 mentions)
- **Playlists & Discovery (Stations/Curation):** 8.9% (135 mentions)

PODCASTS

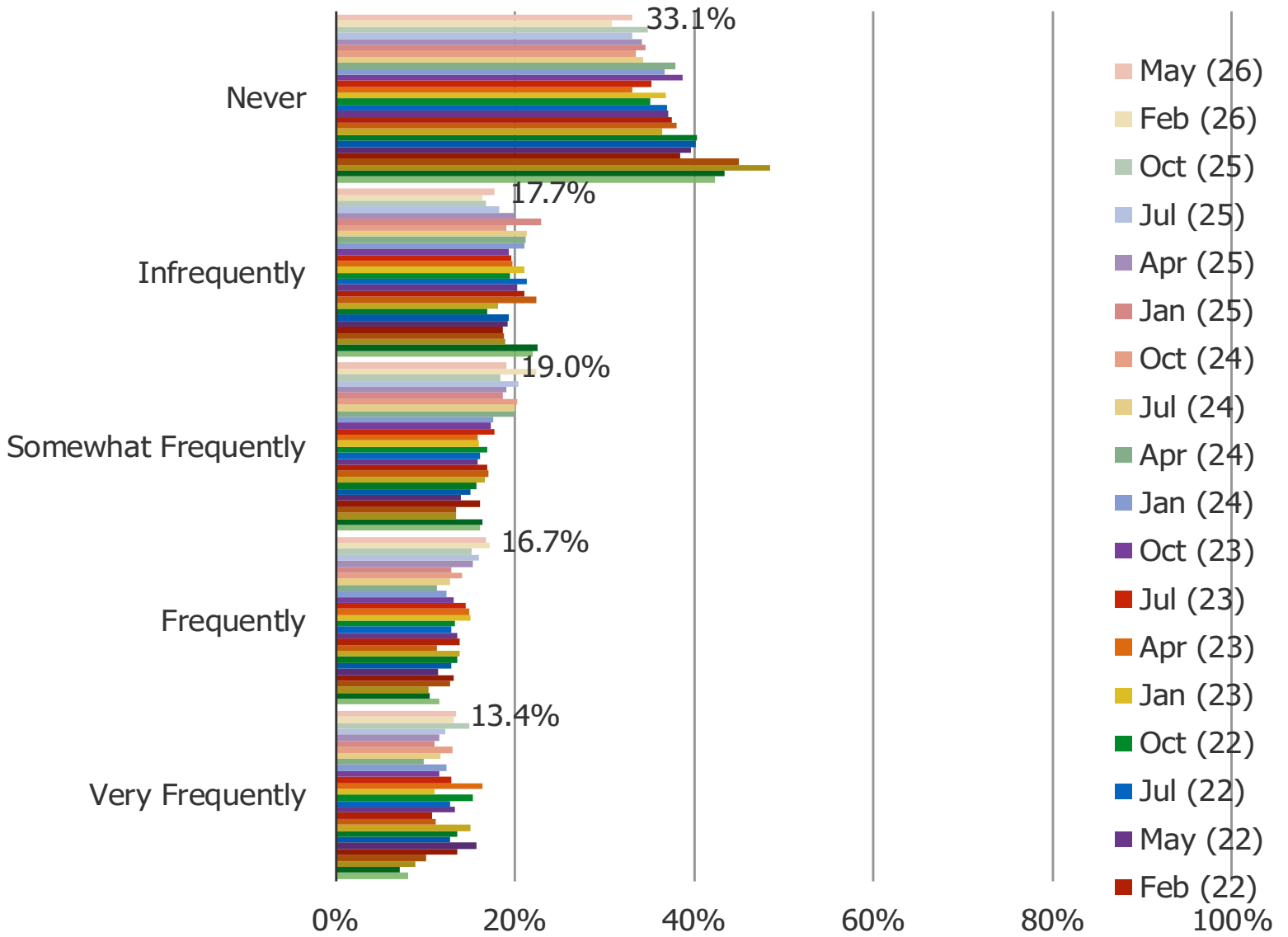
HOW OFTEN DO YOU LISTEN TO...

Posed to all respondents



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.

Top Specific Podcasts Mentioned:

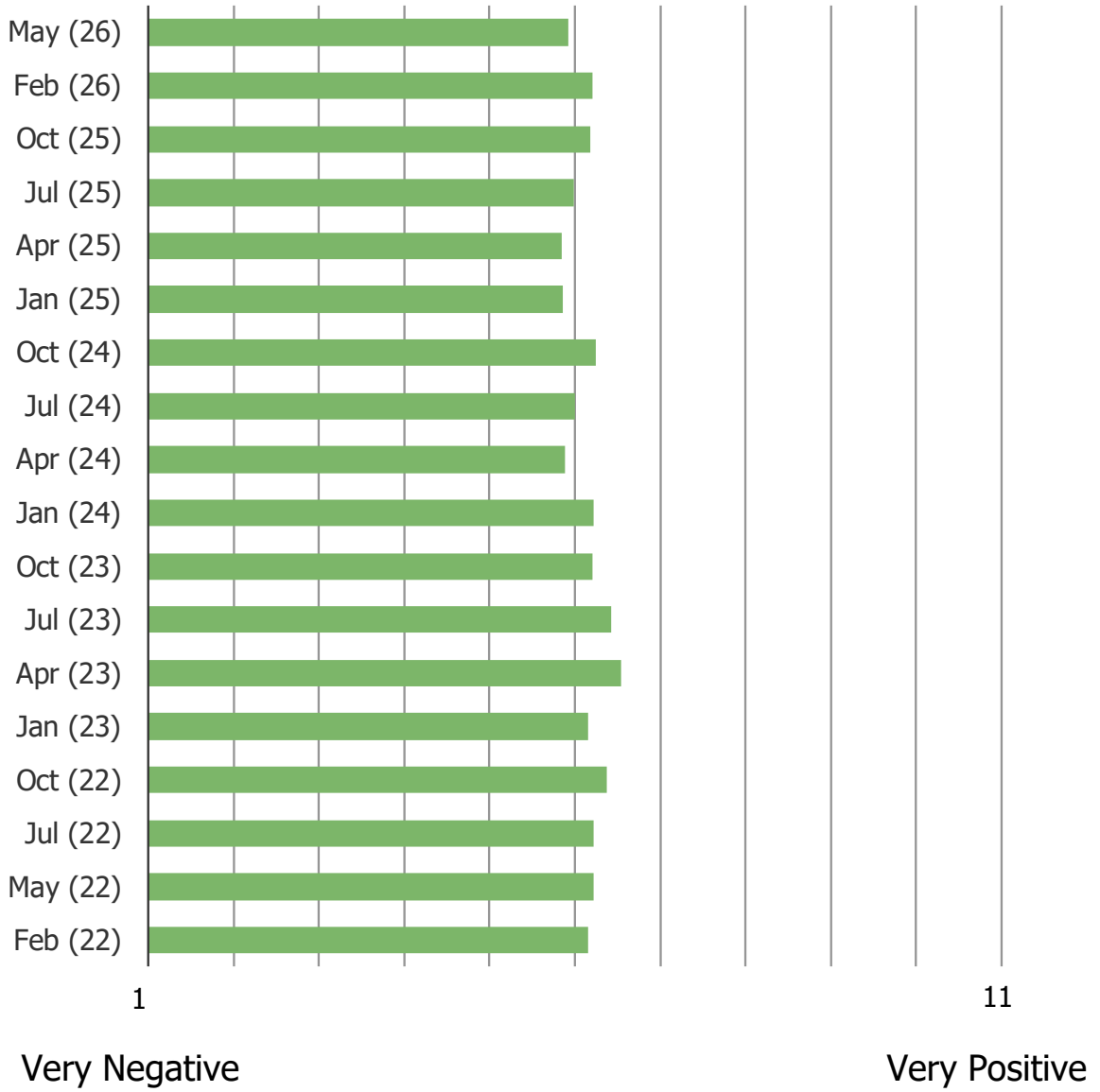
1. **The Joe Rogan Experience:** 2,563 mentions
2. **The Daily (NYT):** 288 mentions
3. **Crime Junkie:** 265 mentions
4. **Call Her Daddy:** 197 mentions
5. **This American Life:** 160 mentions
6. **Serial:** 121 mentions
7. **The Dan Bongino Show:** 113 mentions
8. **The Breakfast Club:** 97 mentions
9. **Dateline NBC:** 97 mentions
10. **MrBallen Podcast & Stuff You Should Know:** 90 mentions (tie)
11. **Morbid:** 87 mentions
12. **The Ben Shapiro Show:** 86 mentions
13. **SmartLess:** 81 mentions

Top Genres Mentioned (When users named a genre instead of a specific show):

1. **True Crime:** 872 mentions
2. **News & Politics:** 679 mentions
3. **Sports:** 504 mentions
4. **Religion & Spirituality:** 191 mentions
5. **Comedy:** 190 mentions
6. **Business & Finance:** 178 mentions

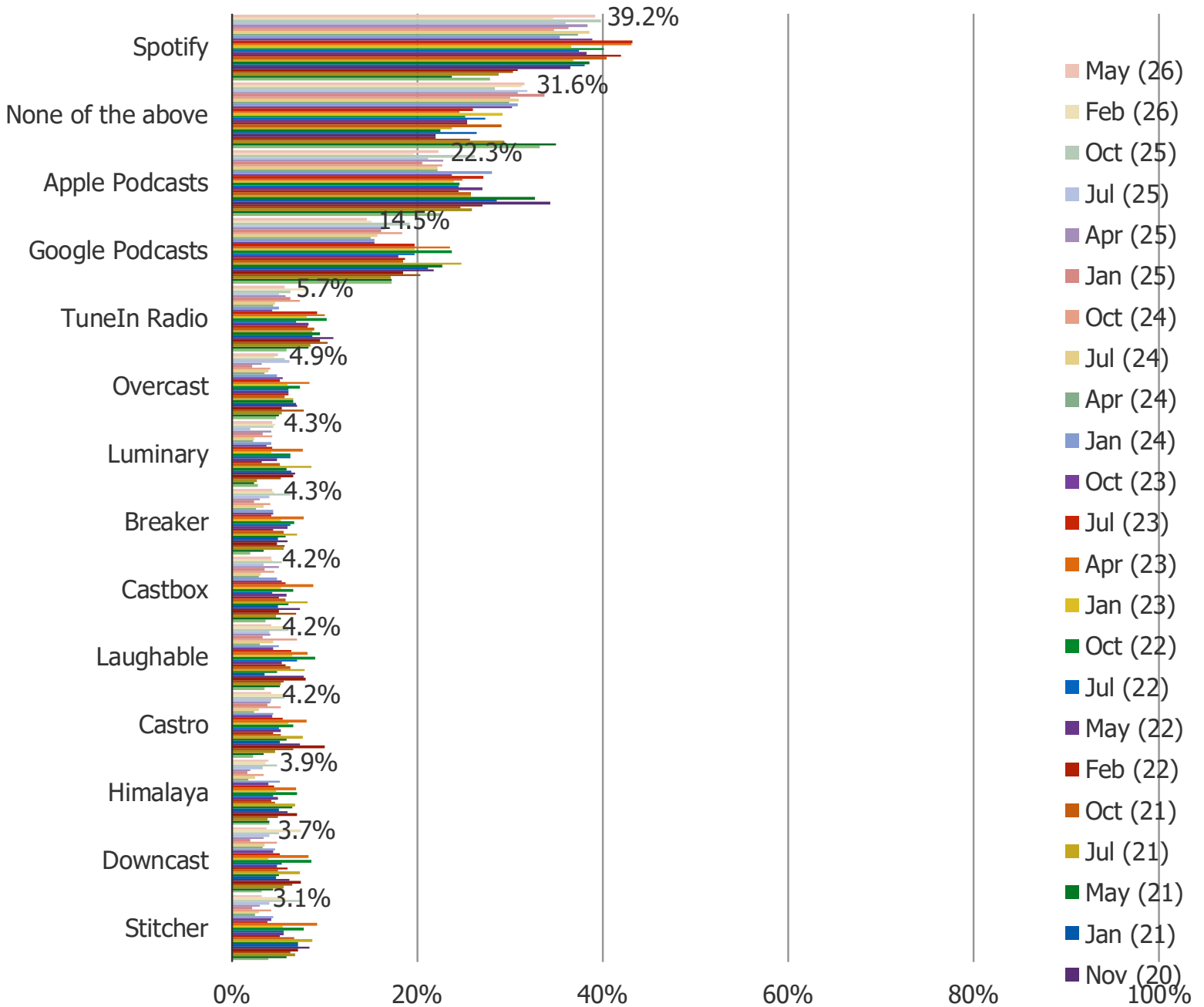
WHAT IS YOUR OPINION OF JOE ROGAN?

Posed to all respondents.



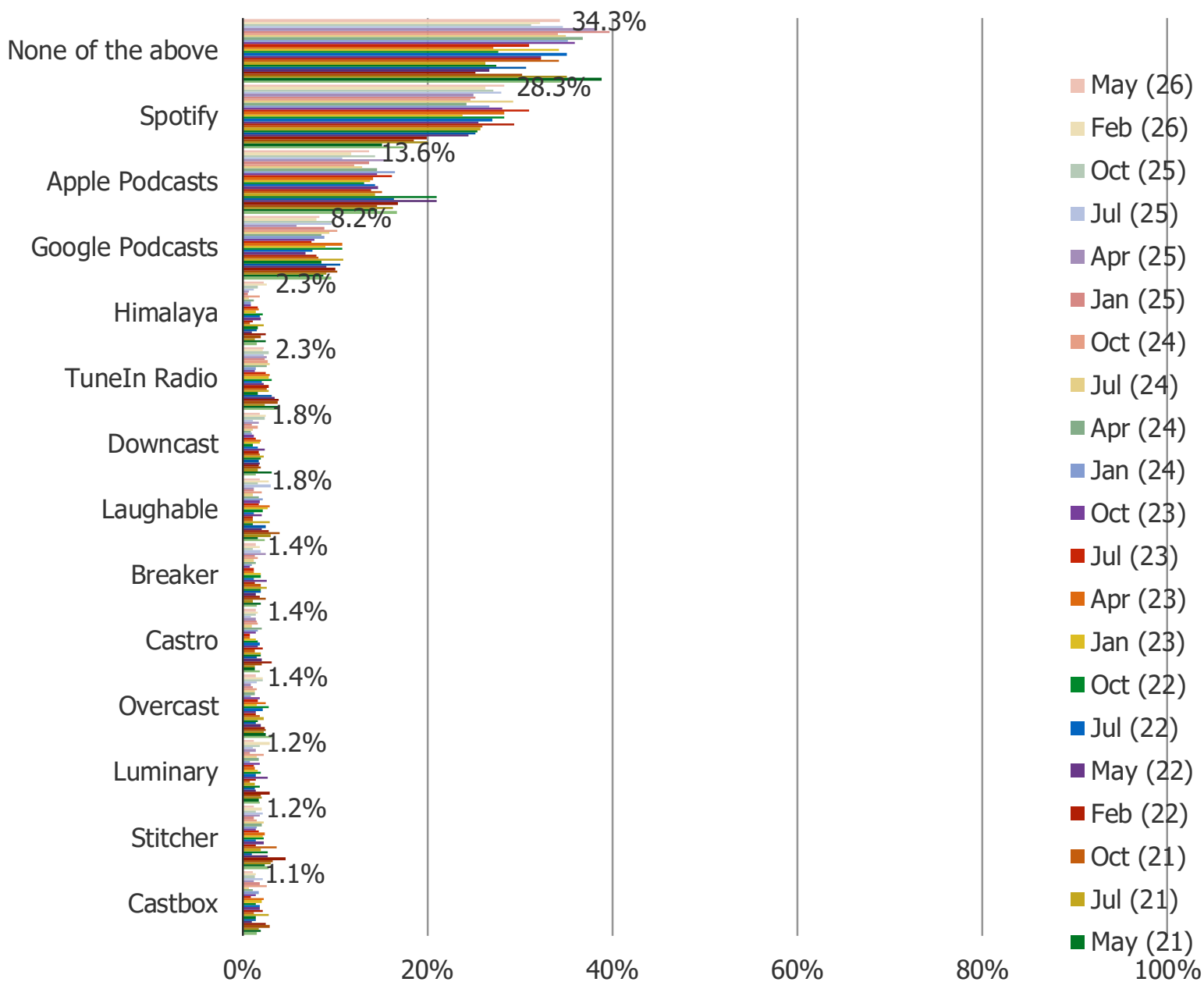
WHICH OF THE FOLLOWING PLATFORMS DO YOU USE TO LISTEN TO PODCASTS?

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?

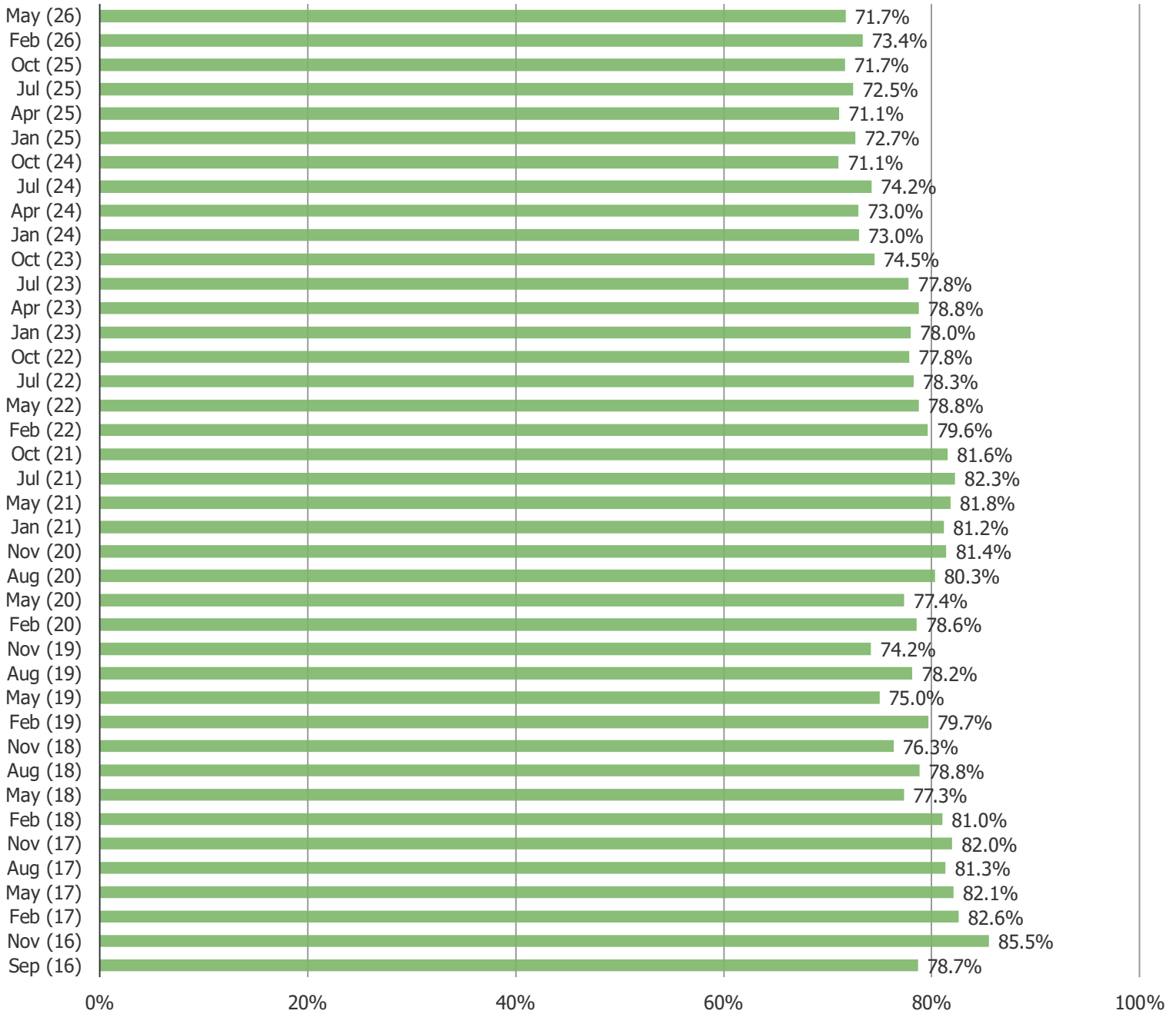
Posed to respondents who listen to podcasts (more often than never)



CONNECTED CAR

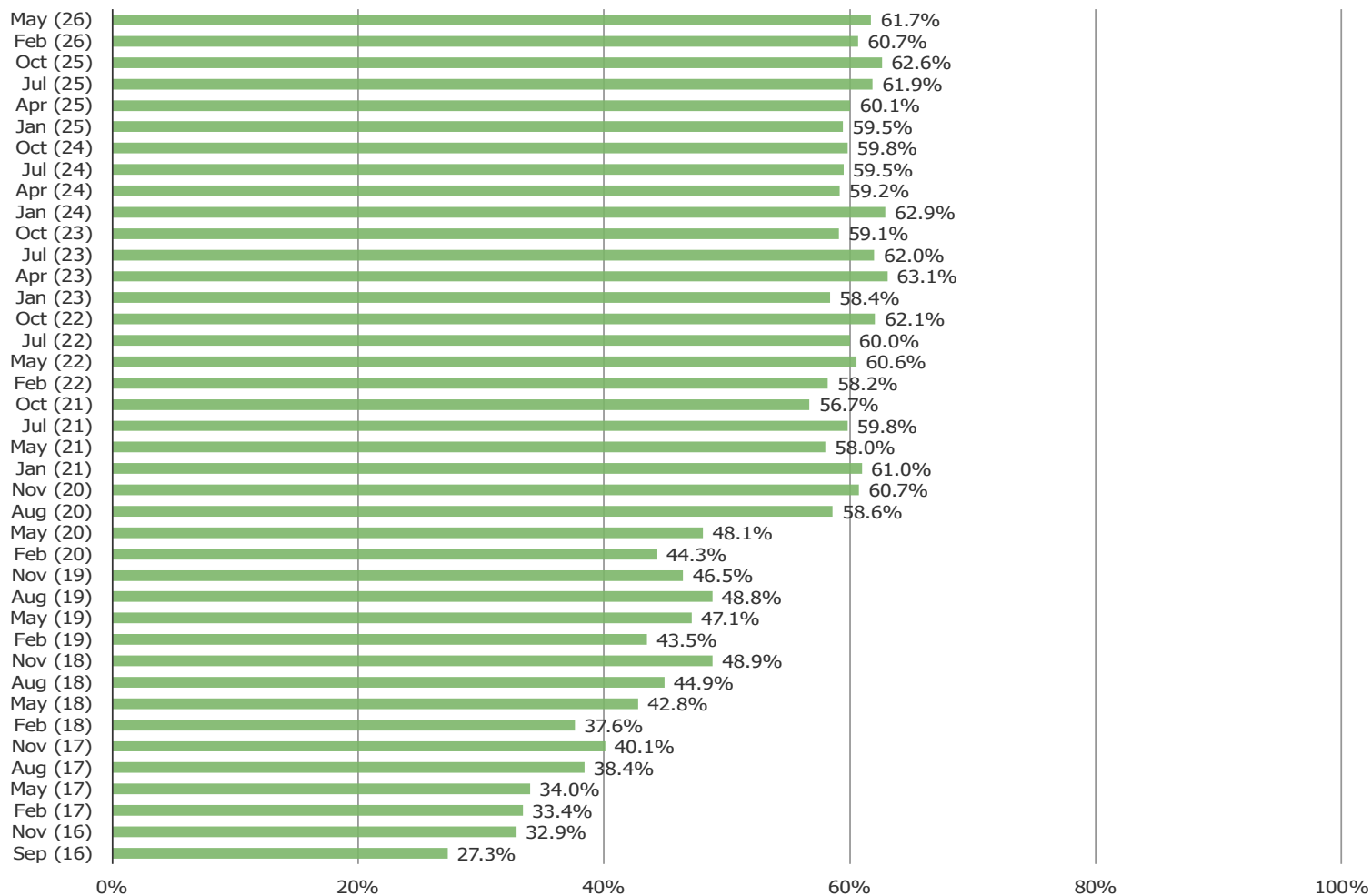
OWNS OR LEASES A CAR

Posed to all respondents



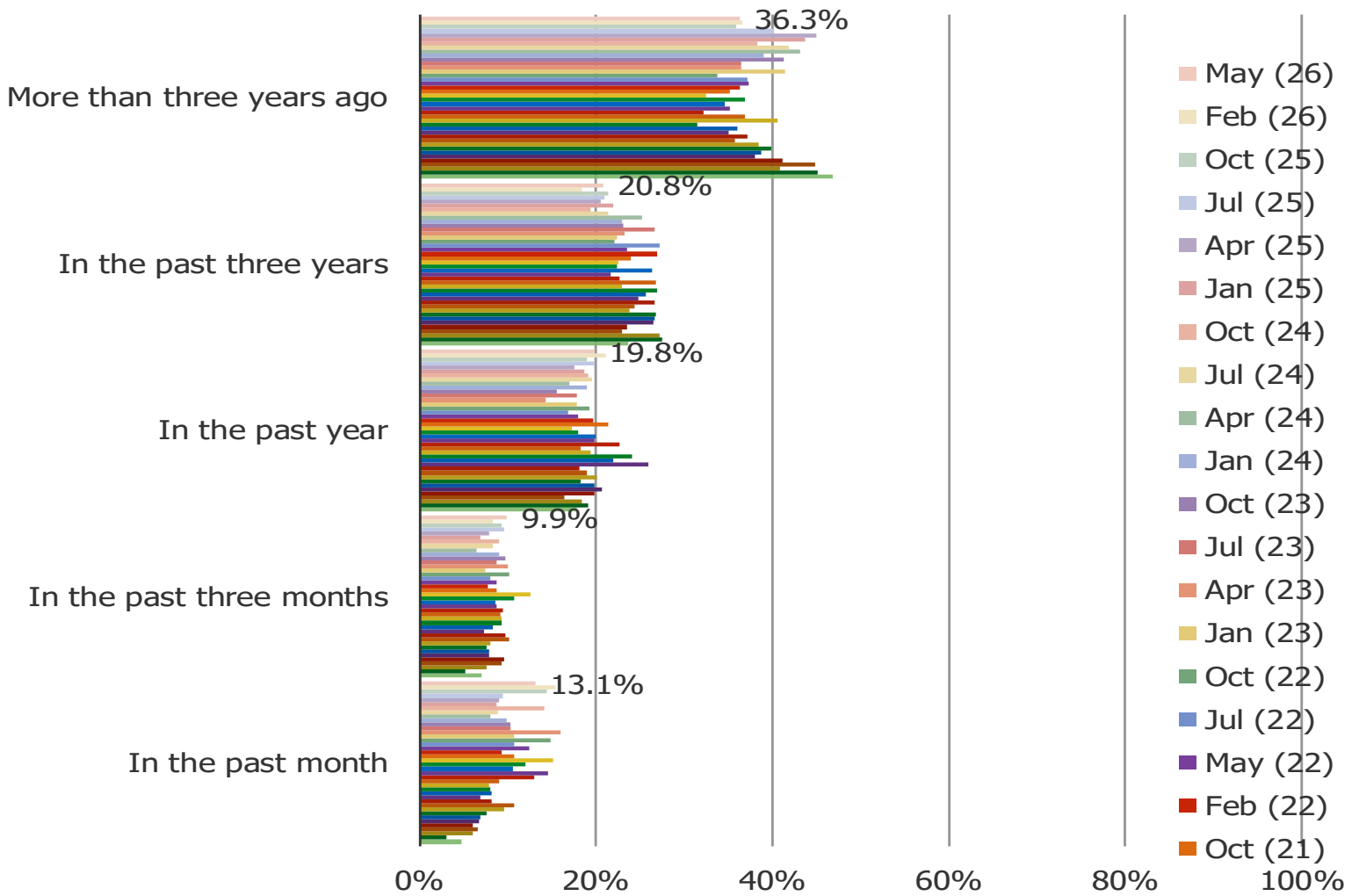
DO YOU EVER CONNECT A SMARTPHONE TO LISTEN TO MUSIC APPS IN YOUR CAR LIKE SPOTIFY, PANDORA, APPLE MUSIC, ETC?

Posed to all respondents who own / lease a car



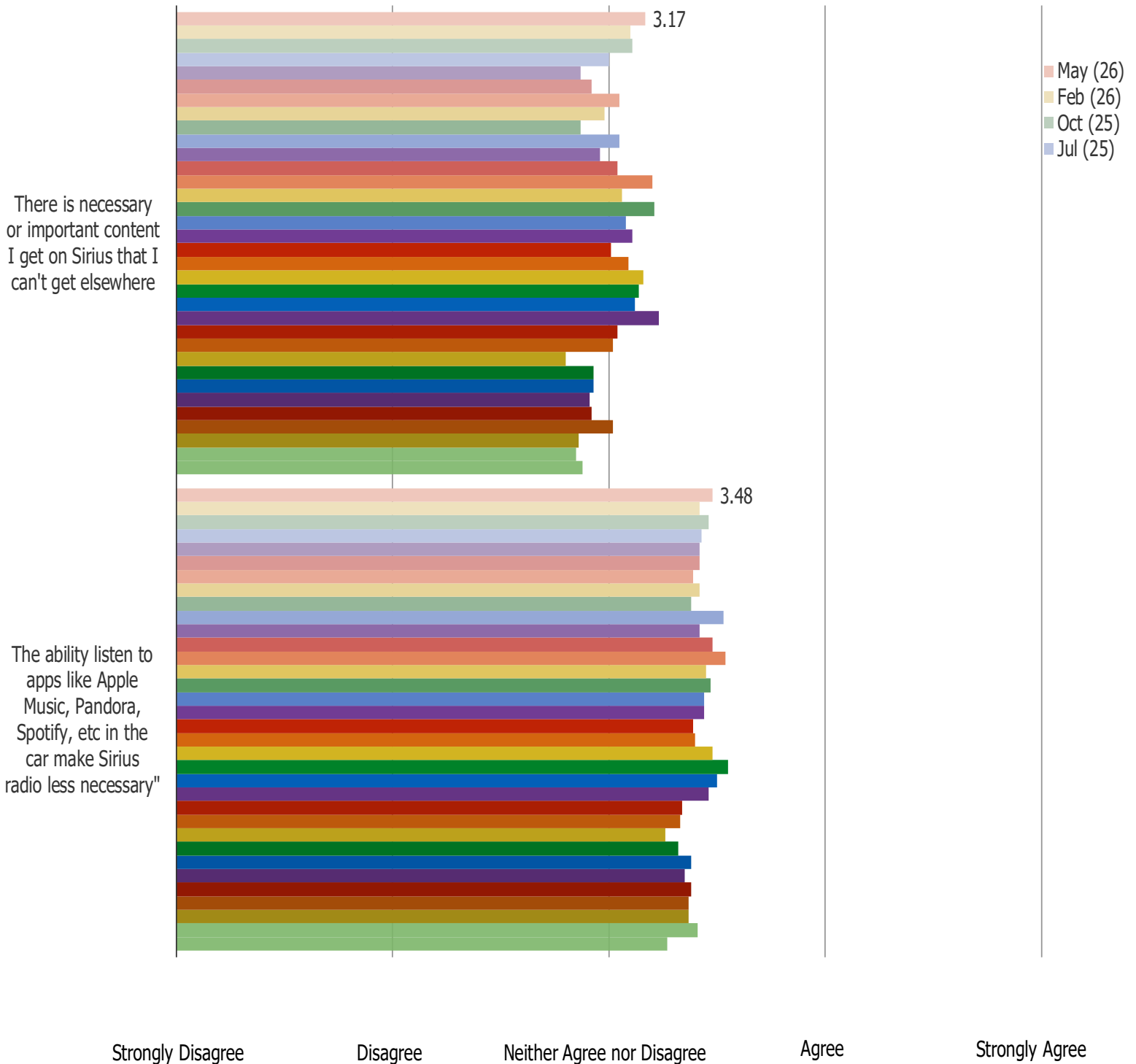
WHEN IS THE LAST TIME YOU PURCHASED OR LEASED A CAR?

Posed to all respondents who own / lease a car



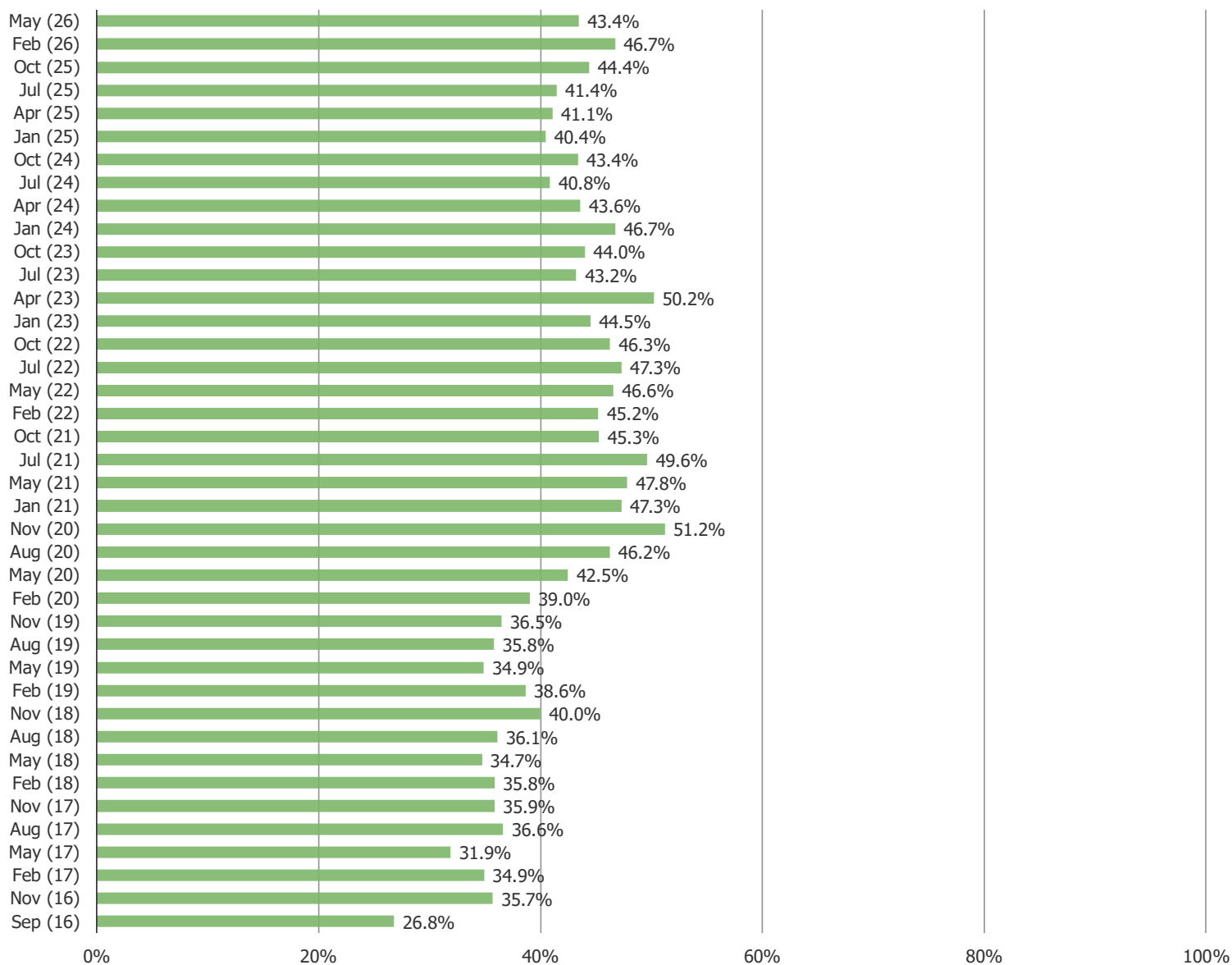
HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS:

Posed to all respondents who own / lease a car



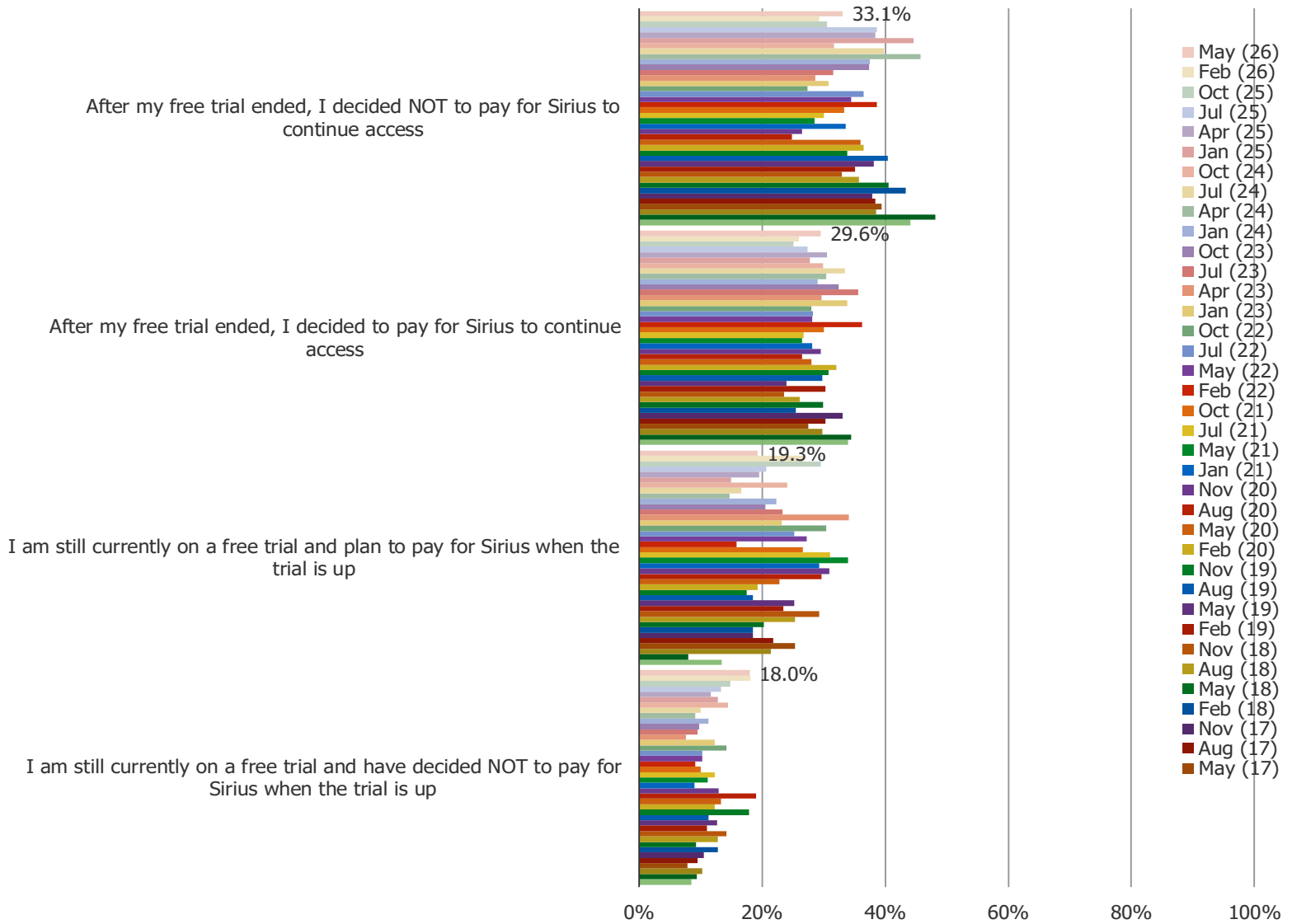
WHEN YOU MOST RECENTLY LEASED OR BOUGHT A CAR, DID IT COME WITH A FREE TRIAL TO SIRIUS RADIO?

Posed to all respondents who own / lease a car



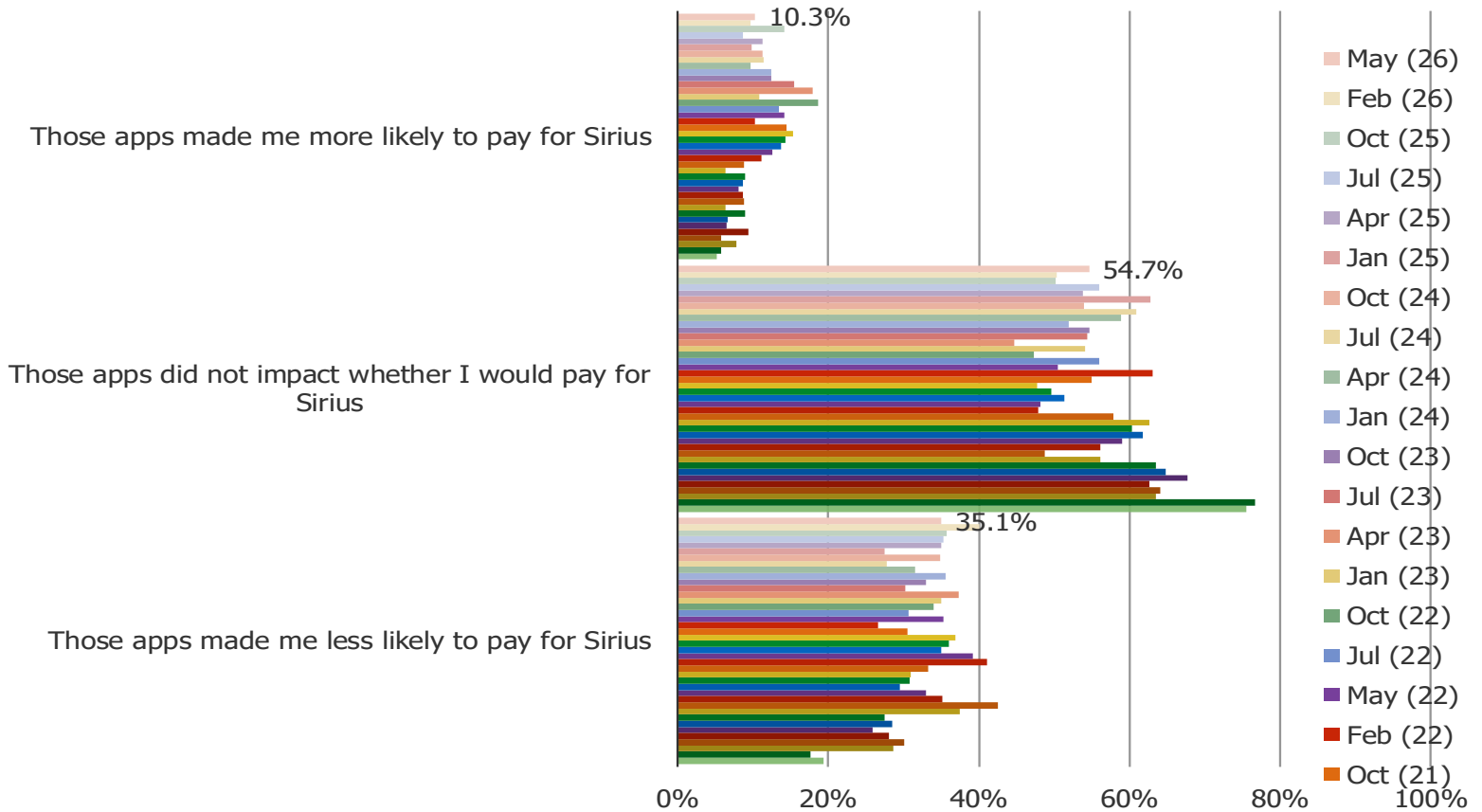
WHEN THE FREE TRIAL WAS UP, WHAT DID YOU DO?

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?

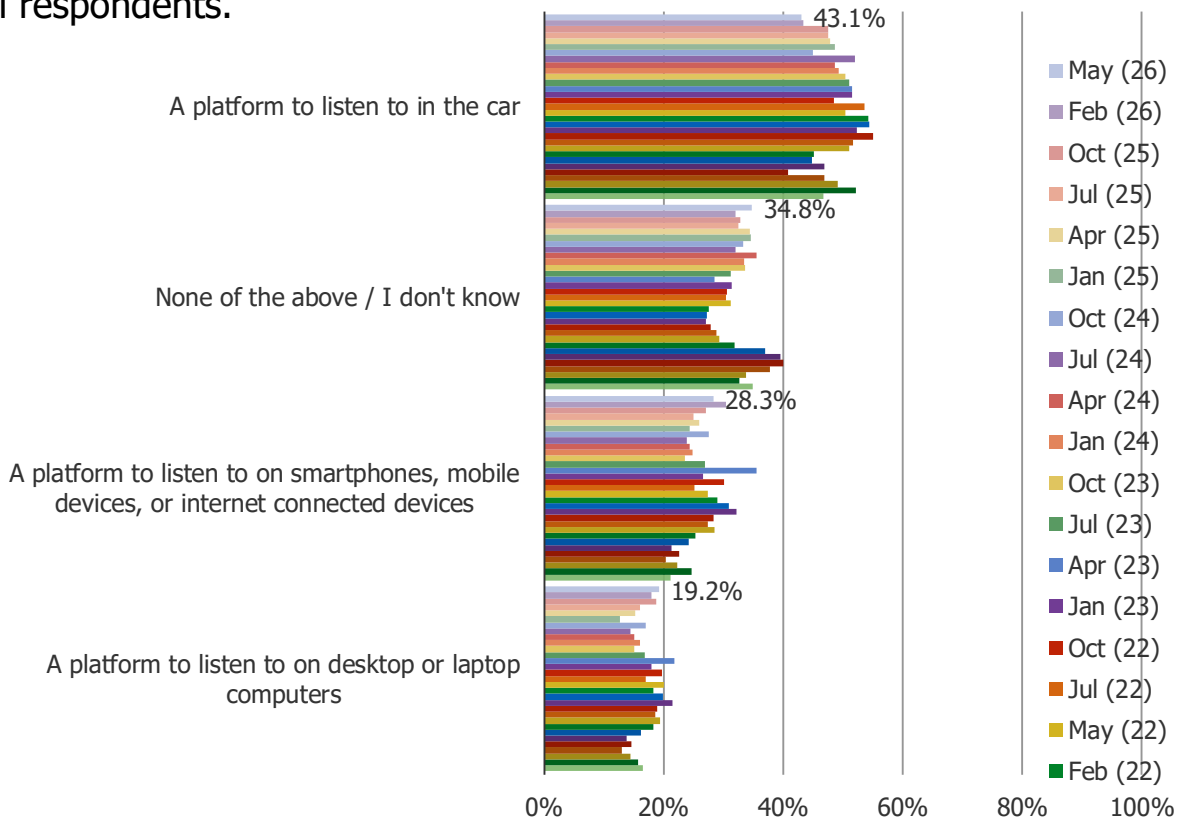
Posed to respondents who had/have a free trial when they most recently got a new car.



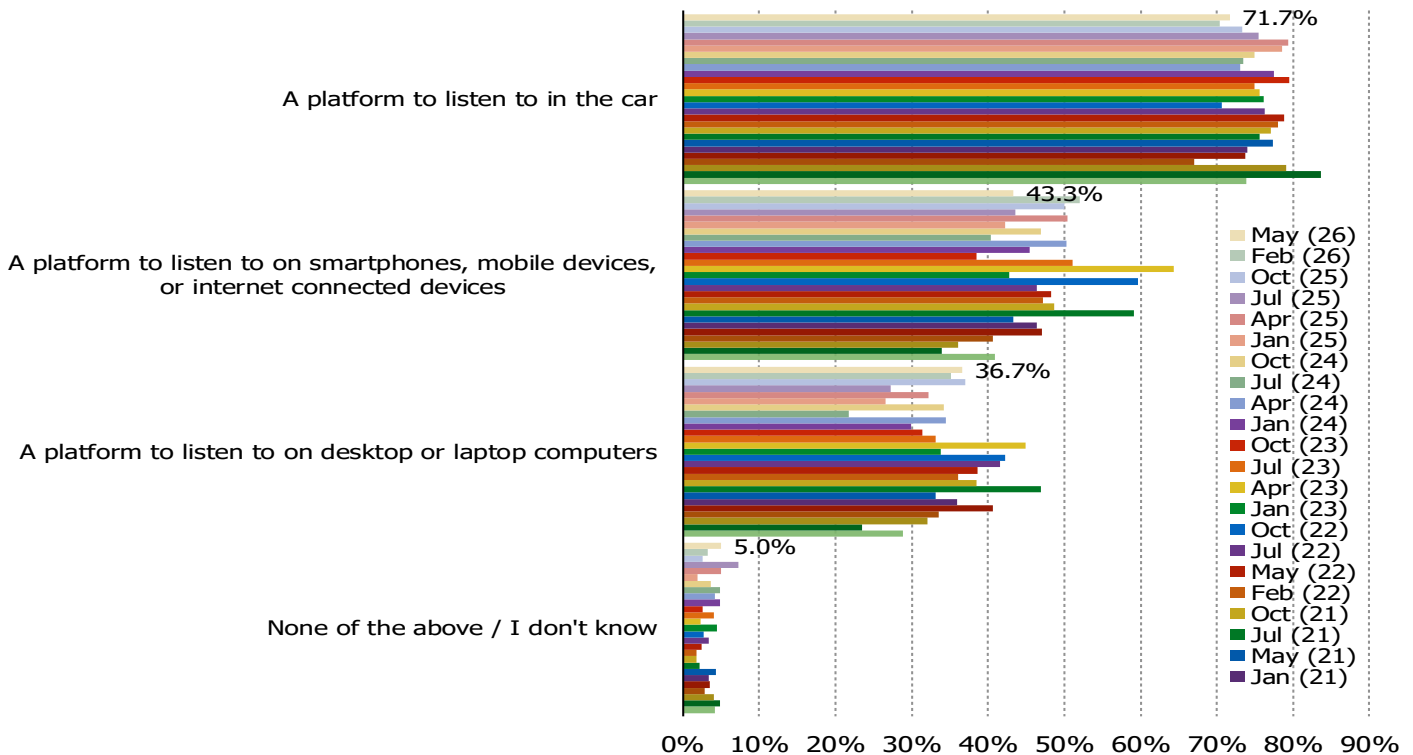
SIRIUS XM

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

Posed to all respondents.

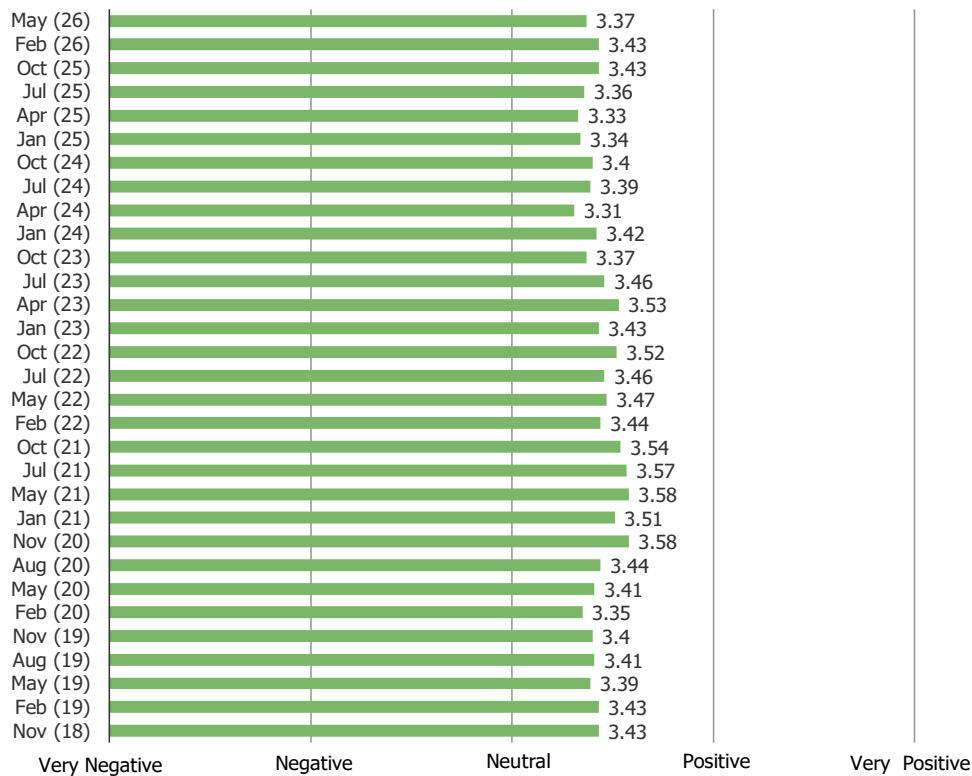


Posed to paying Sirius subscribers.

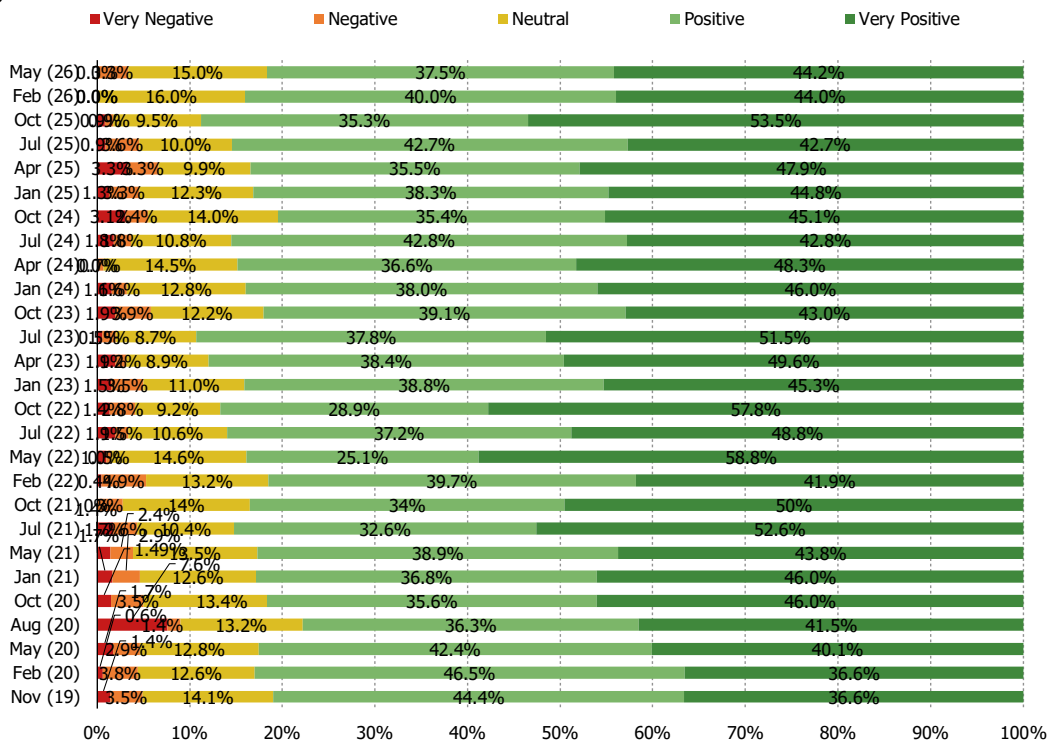


WHAT IS YOUR PERCEPTION OF SIRIUS XM?

Posed to all respondents.



Posed to paying Sirius subscribers.



WHY IS YOUR OPINION NEGATIVE?

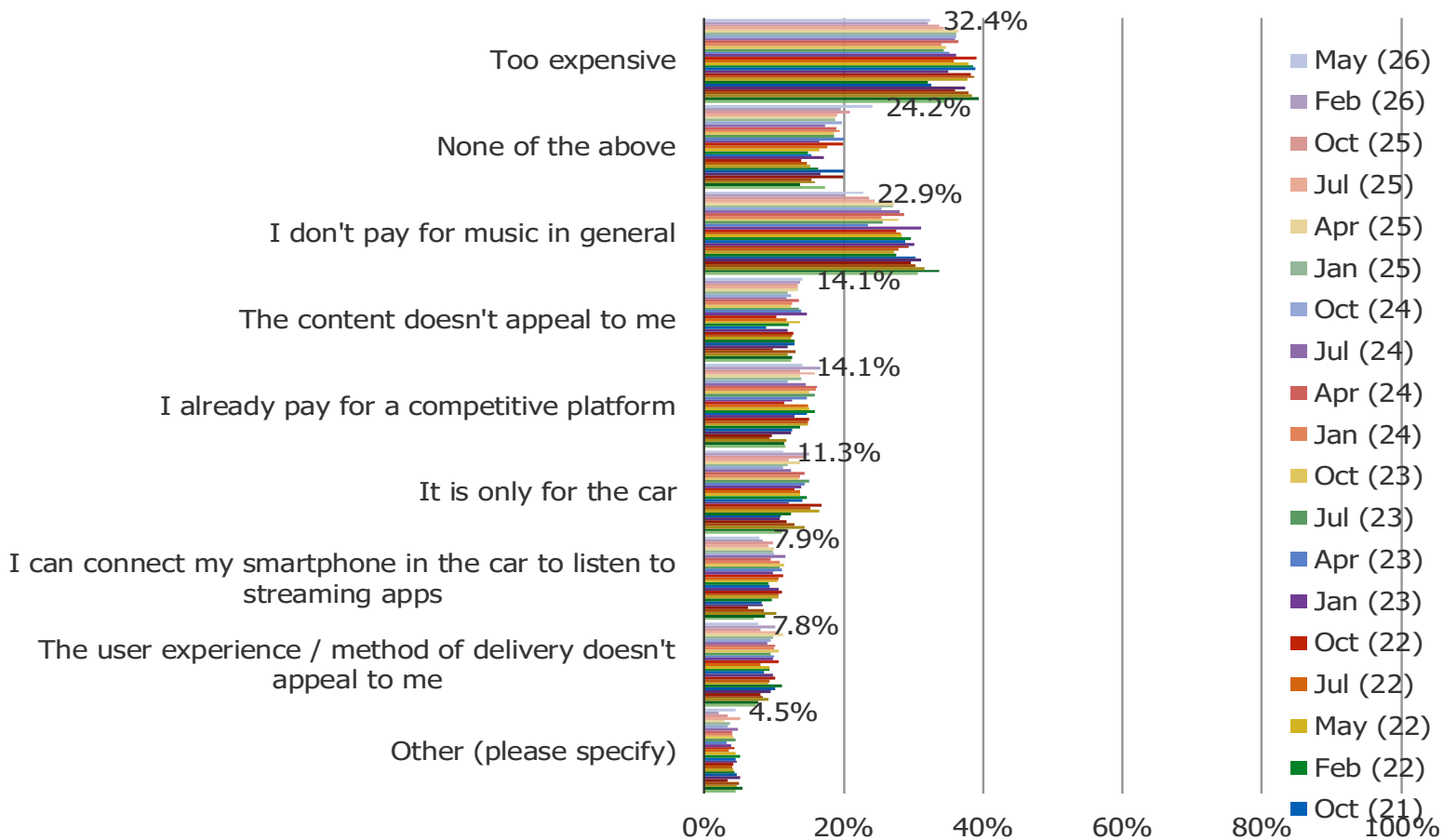
Posed to respondents who said they have a negative opinion of Sirius XM.

Here is the quantified breakdown of why your respondents hold a negative opinion of SiriusXM:

- **Other / Unclassified (Ambiguous or unique responses): 34.7%**
(e.g., "Always found it difficult to use", "Because they reel you in with deals and then raise the prices")
- **Too Expensive / Pricing Tactics / Should be Free: 23.5%**
(e.g., "Too costly", "I don't believe a person should have to pay to listen to the radio", "Overpriced")
- **Irrelevant / No Answer / Noise: 10.4%**
(e.g., "N/A", "Idk", "Nothing")
- **General Dislike / Vague: 9.9%**
(e.g., "I just don't like it", "Not my thing", "Not a fan")
- **Unfamiliar / Don't Listen / No Interest: 6.6%**
(e.g., "Never heard of it", "I don't listen to music", "Don't use it")
- **Poor Content (Repetitive, Ads, Poor Selection): 5.3%**
(e.g., "They only play the same stuff", "Announcers talk too much instead of playing music")
- **Dislikes Specific Content (Politics, Howard Stern, Hosts): 3.4%**
(e.g., "They are woke", "Howard Stern", "Right-wing content", "Loud hosts")
- **Technical Issues / Poor Signal or App: 2.4%**
(e.g., "Cuts in and out", "Static", "It did not work most of the time")
- **Prefers Competitors (Spotify, Apple) / Outdated: 1.9%**
(e.g., "It sucks compared to Spotify", "Seems like a relic of the past", "I use Apple Music")
- **Hard to Cancel / Customer Service / Spam Mail: 1.9%**
(e.g., "They made it difficult to cancel", "Impossible to unsubscribe", "Spam mail")

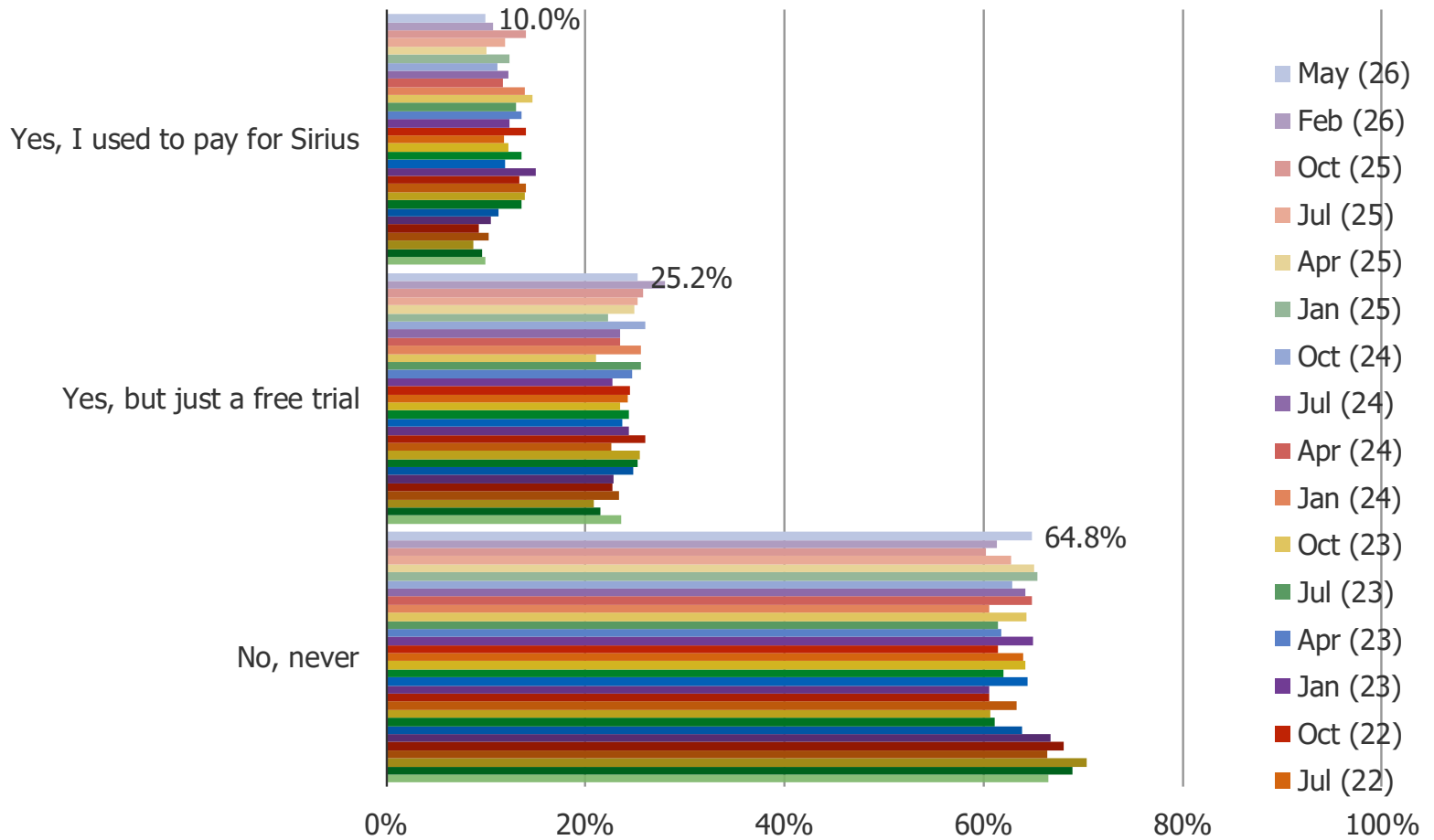
WHY ARE YOU NOT A SIRIUS XM SUBSCRIBER? (SELECT ALL THAT APPLY)

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



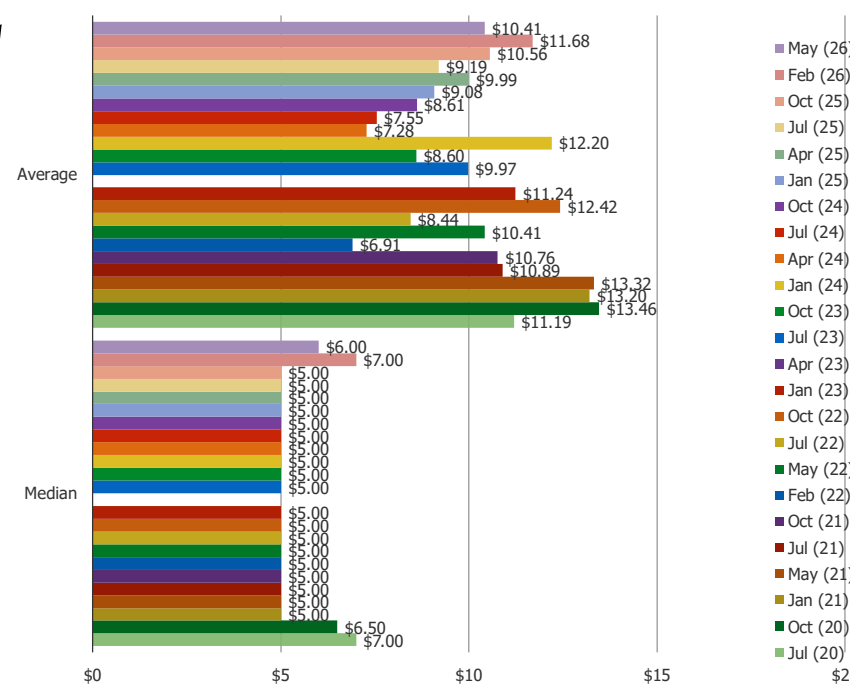
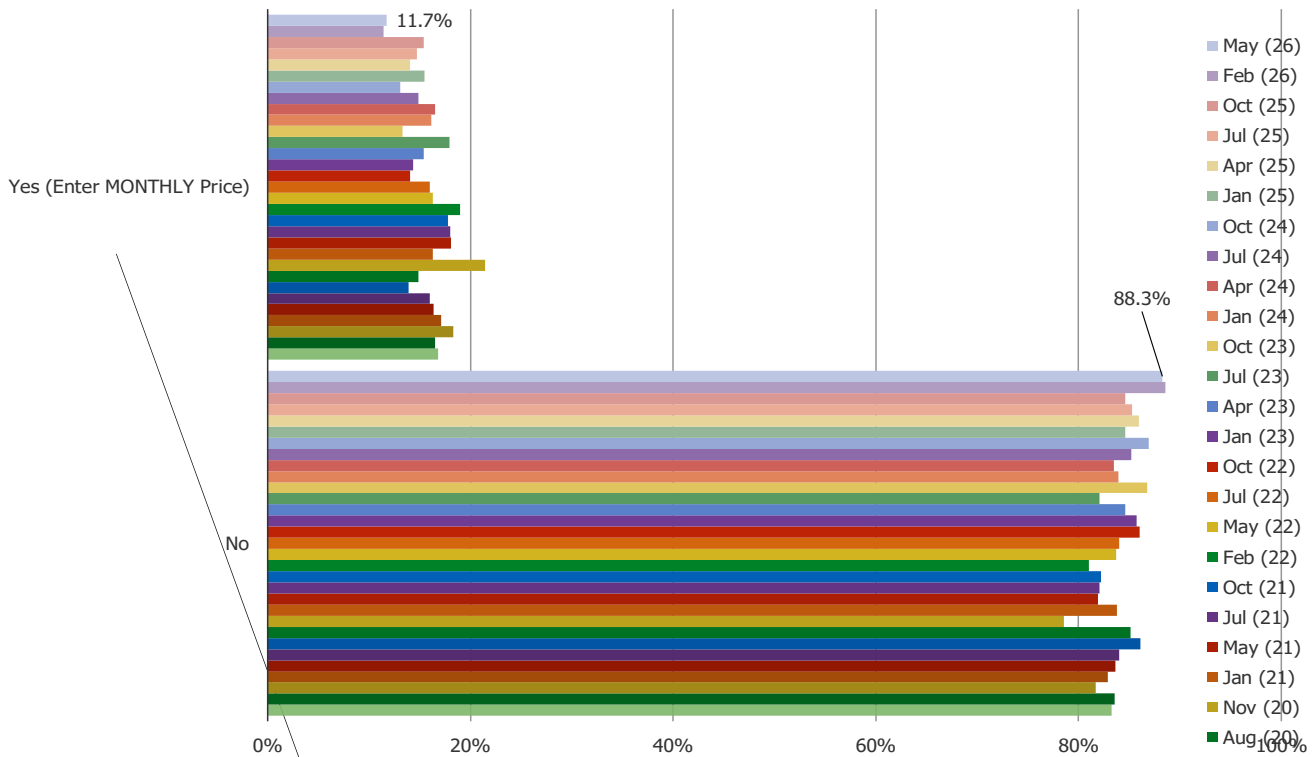
HAVE YOU EVER BEEN A SIRIUS XM SUBSCRIBER?

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

