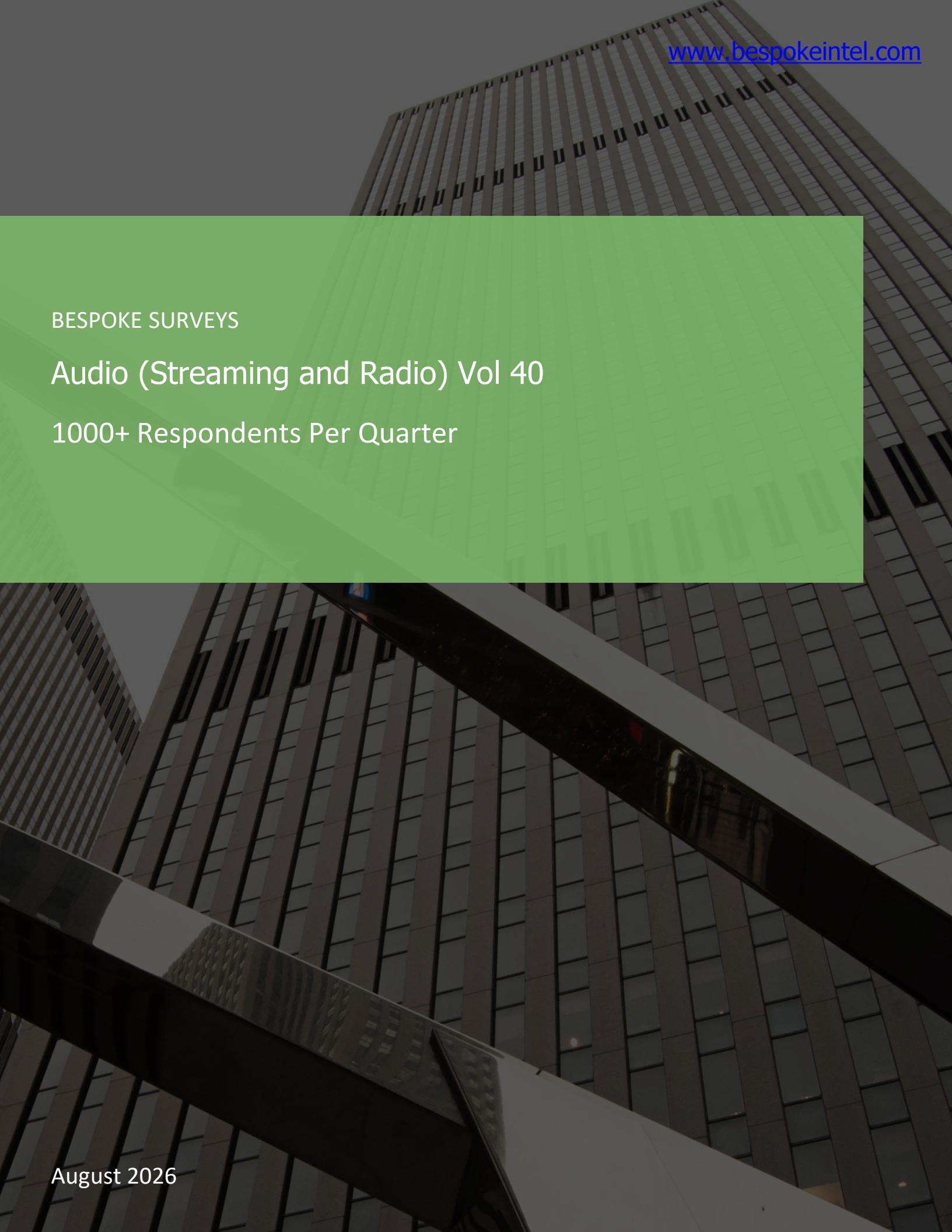


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BESPOKE SURVEYS

Audio (Streaming and Radio) Vol 40

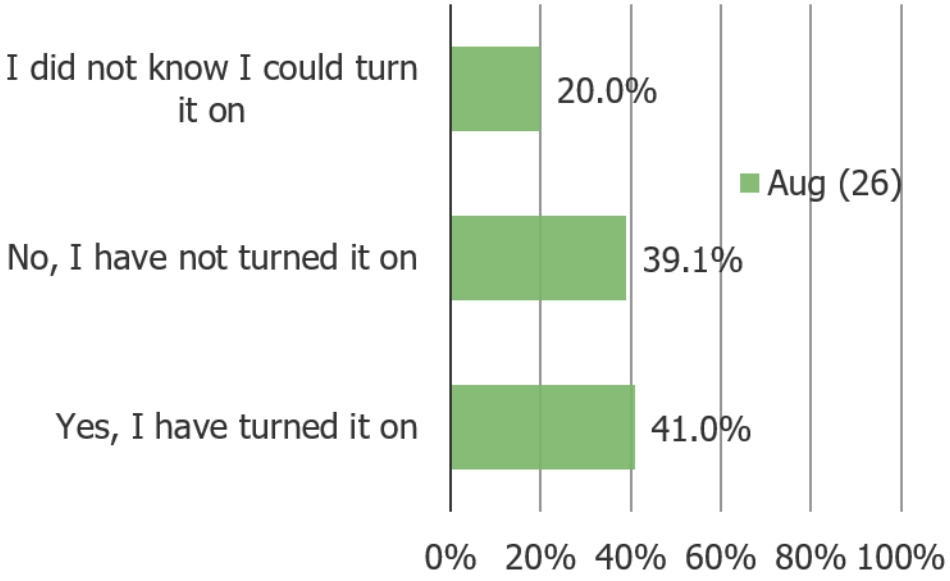
1000+ Respondents Per Quarter

August 2026

NEW QUESTIONS

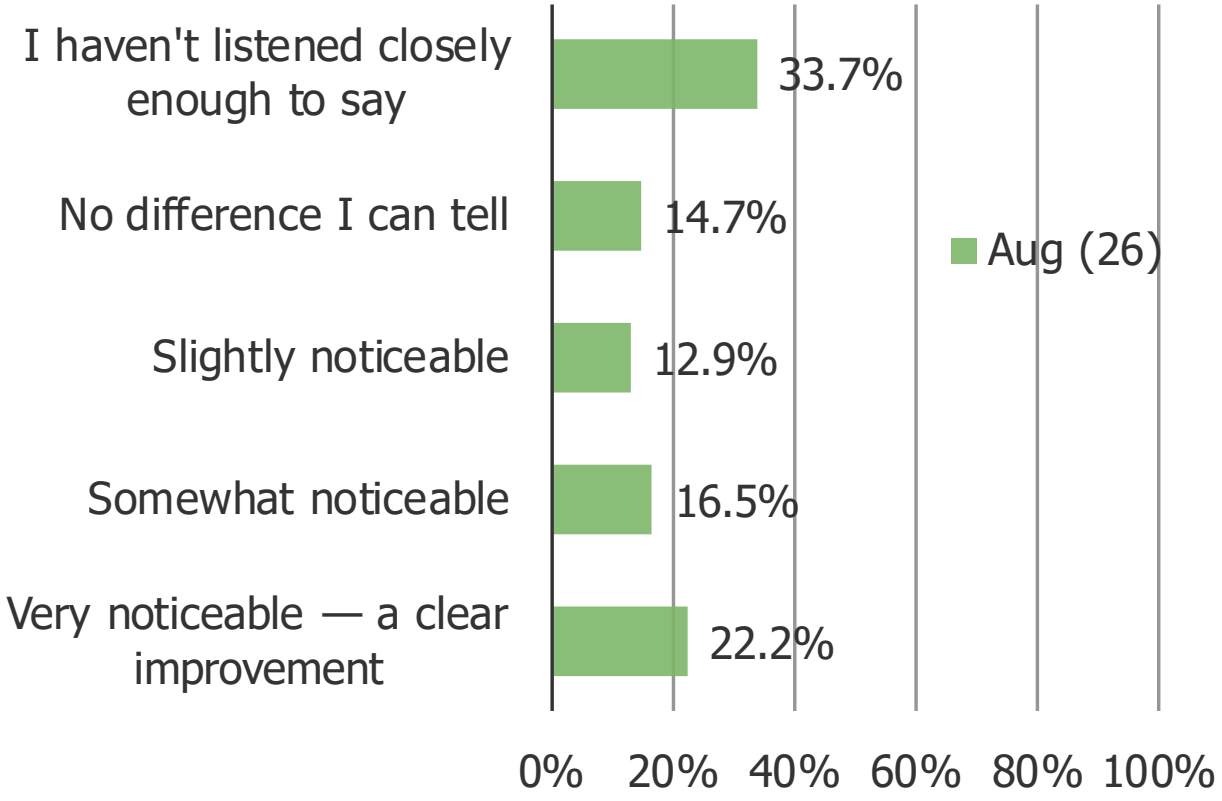
HAVE YOU MANUALLY ENABLED LOSSLESS AUDIO IN YOUR SETTINGS?

Posed to paid users of Spotify (N = 210)



SINCE TURNING ON LOSSLESS/HI-FI AUDIO, HOW NOTICEABLE IS THE DIFFERENCE IN SOUND QUALITY TO YOU?

Posed to respondents who have turned on lossless/Hi-Fi audio.



WHY DO YOU CHOOSE TO PAY FOR THIS APP INSTEAD OF OTHERS?

Posed to respondents who use the below.

Table 1: The Streaming Giants

Category	Spotify	Apple Music	Youtube
Variety, Content Selection & Catalog	20.6%	19.8%	20.5%
General Positive Sentiment	19.7%	19.8%	20.0%
Pricing, Value & Ad-Free Experience	6.6%	7.5%	**13.8%**
Familiarity, Ecosystem, & Convenience	5.3%	**10.8%**	6.7%
Sound & Audio Quality	**9.2%**	7.1%	4.6%
Customization, Features & Playlists	**6.1%**	1.4%	2.6%
Invalid / Unsure / Noise	7.5%	8.0%	7.2%
Other / Unclassified	25.0%	25.5%	24.6%

WHY DO YOU CHOOSE TO PAY FOR THIS APP INSTEAD OF OTHERS?

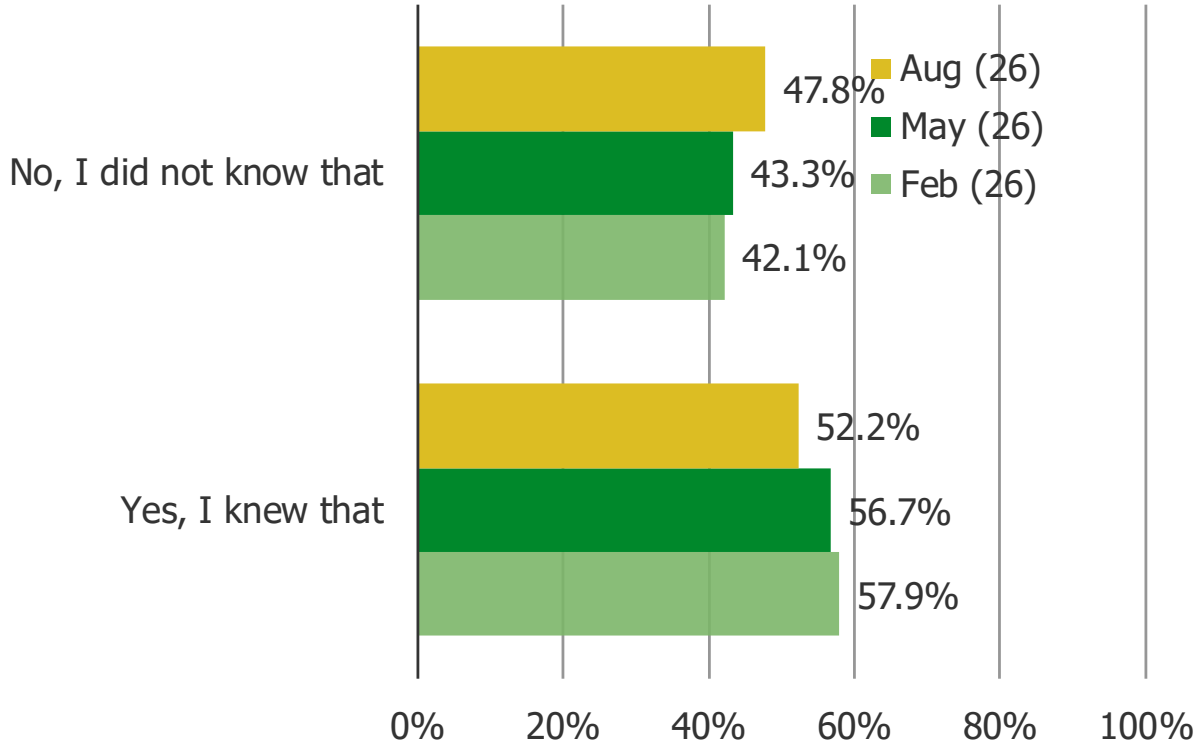
Posed to respondents who use the below.

Table 2: Legacy & Radio Platforms

Category	Pandora	Sirius Radio
Variety, Content Selection & Catalog	17.7%	**31.4%**
General Positive Sentiment	21.0%	21.6%
Familiarity, Ecosystem, & Convenience	5.6%	**19.6%**
Pricing, Value & Ad-Free Experience	8.9%	9.8%
Customization, Features & Playlists	4.8%	0.0%
Sound & Audio Quality	4.0%	4.9%
Invalid / Unsure / Noise	8.1%	5.9%
Other / Unclassified	29.8%	6.9%

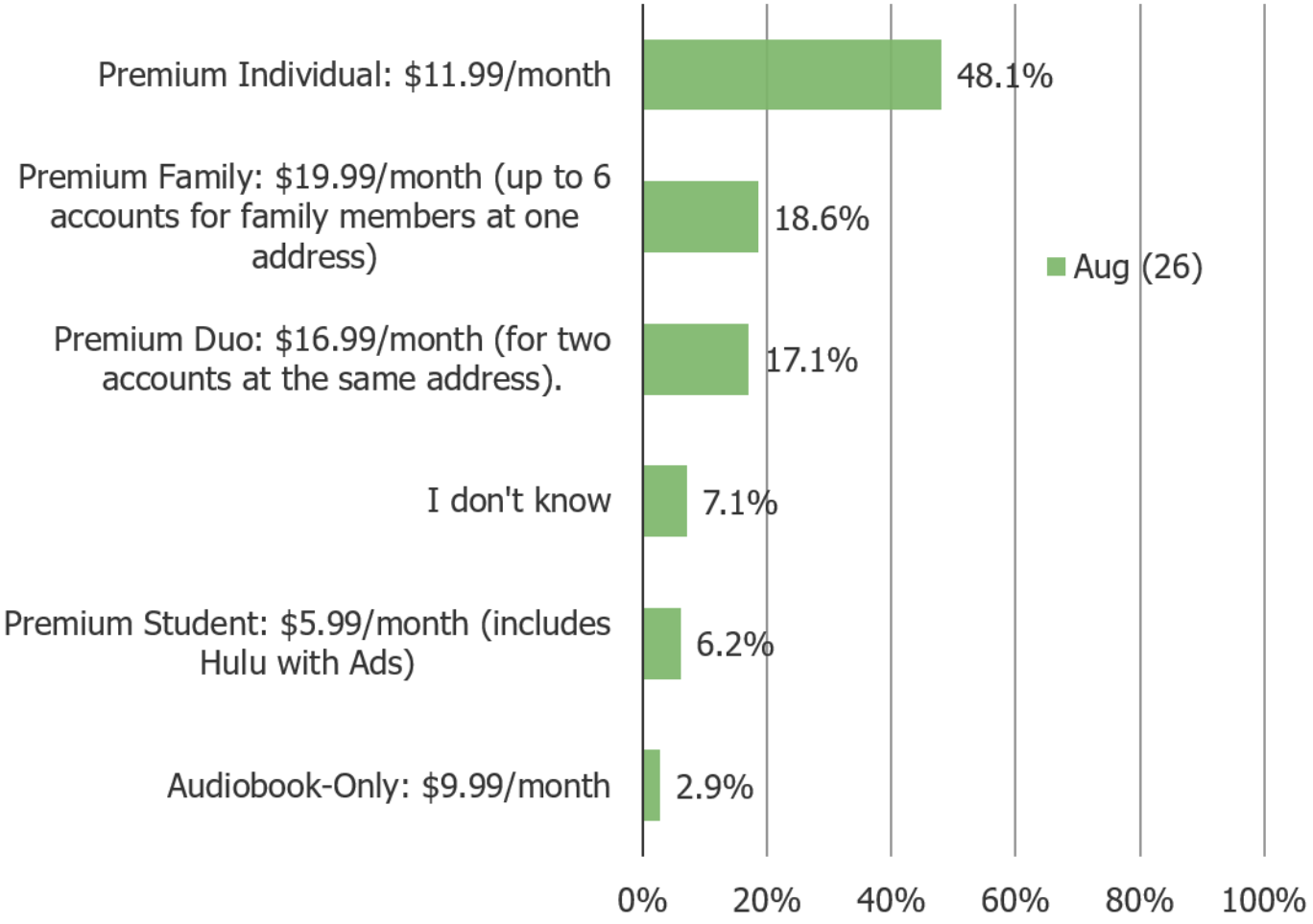
DID YOU KNOW THAT SPOTIFY PREMIUM PLANS NOW INCLUDE LOSSLESS / HIGH FIDELITY AUDIO?

Posed to respondents who use Spotify (N = 358)



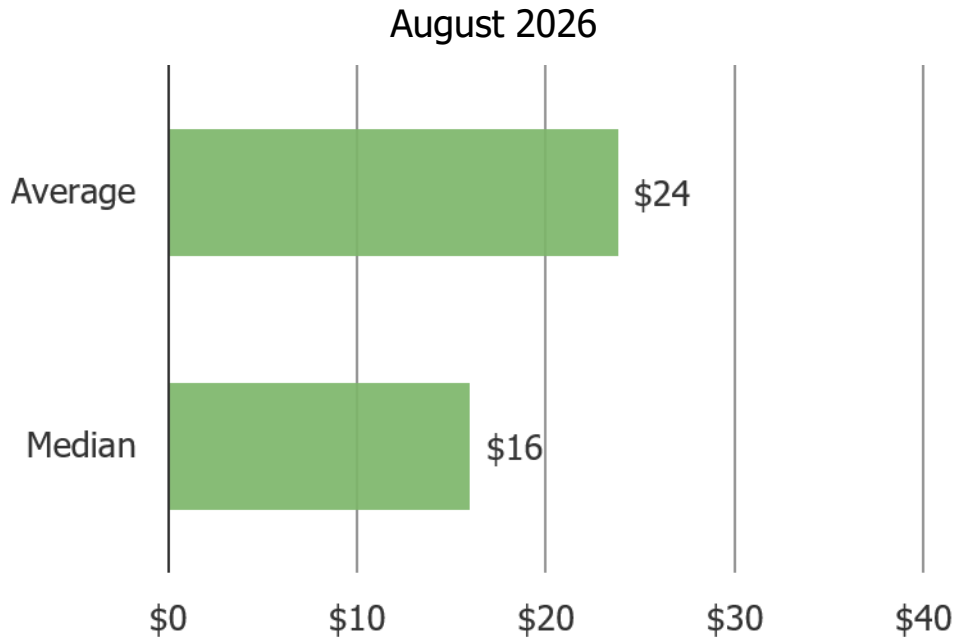
WHICH SPOTIFY PREMIUM PLAN DO YOU CURRENTLY PAY FOR?

Posed to Spotify Premium members (N = 210)



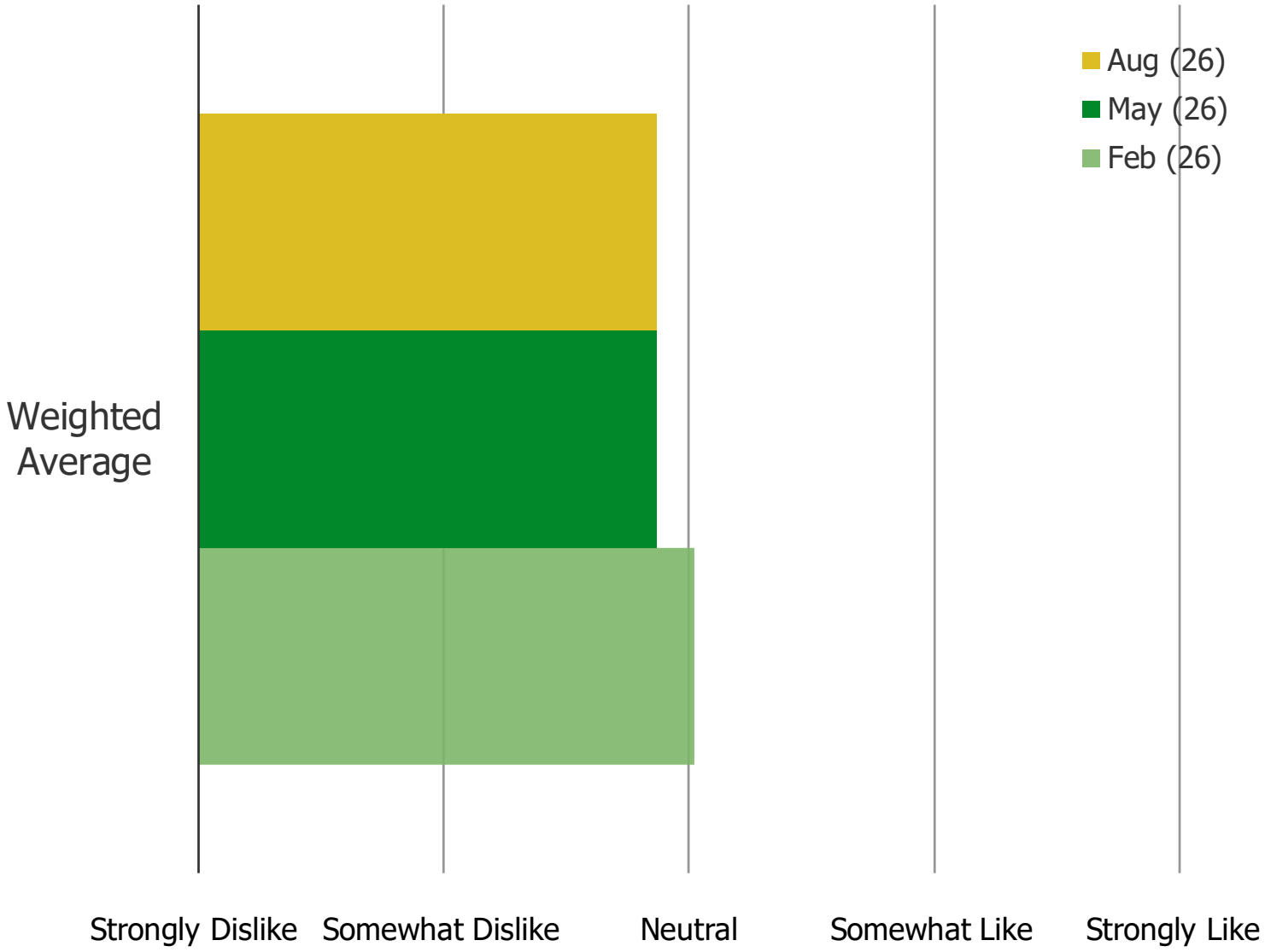
AT WHAT MONTHLY PRICE POINT WOULD YOU DECIDE TO CANCEL YOUR SPOTIFY SUBSCRIPTION? (IE, IF SPOTIFY CONTINUES TO RAISE PRICES, WHAT PRICE POINT PER MONTH WOULD TRIGGER YOUR CANCELLATION OF SPOTIFY)?

Posed to respondents who use Spotify (N = 358)



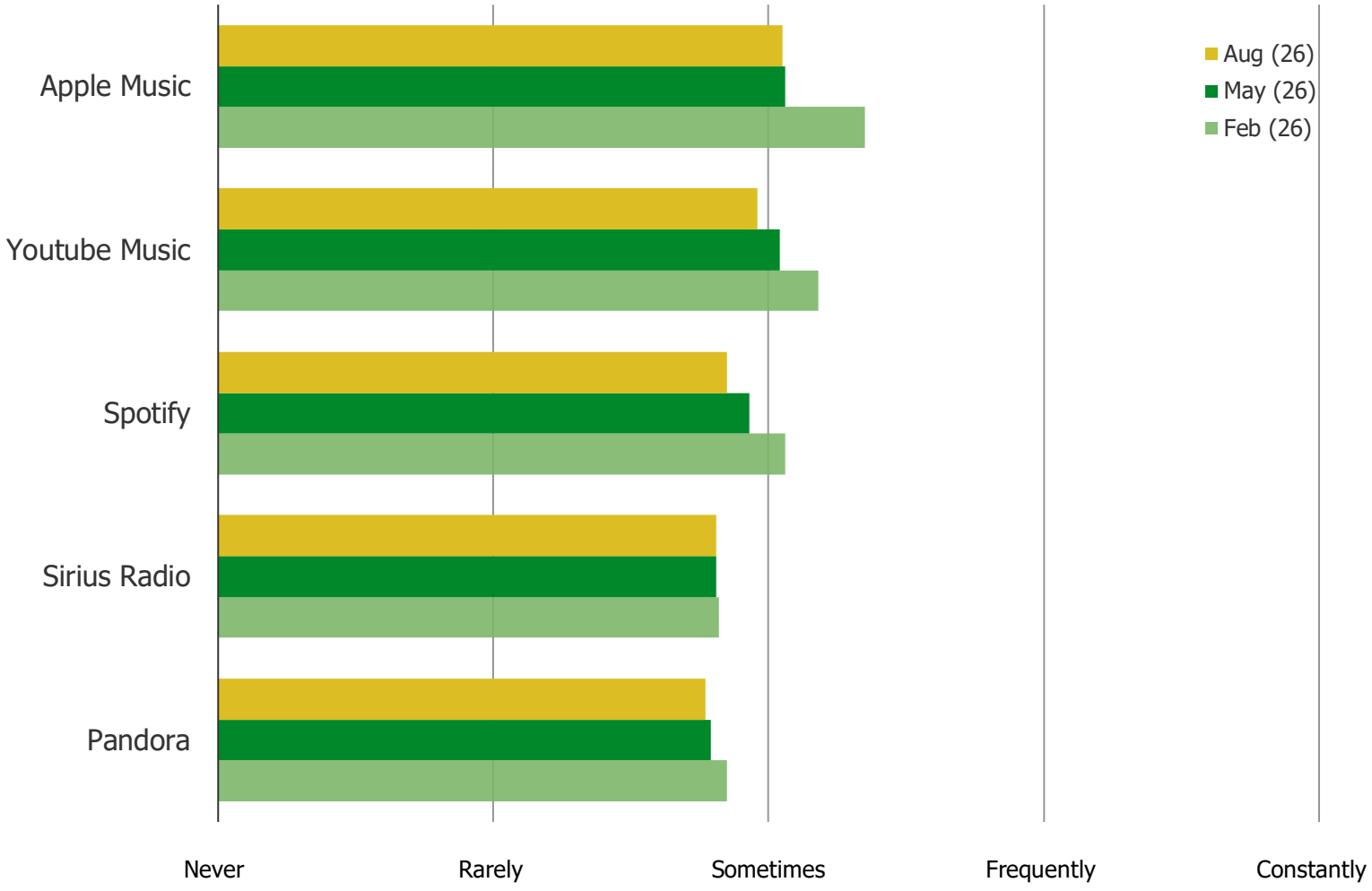
DO YOU LIKE ENCOUNTERING SONGS/AUDIO MADE BY AI IN YOUR DISCOVERY FEED ON STREAMING MUSIC PLATFORMS?

Posed to all respondents.



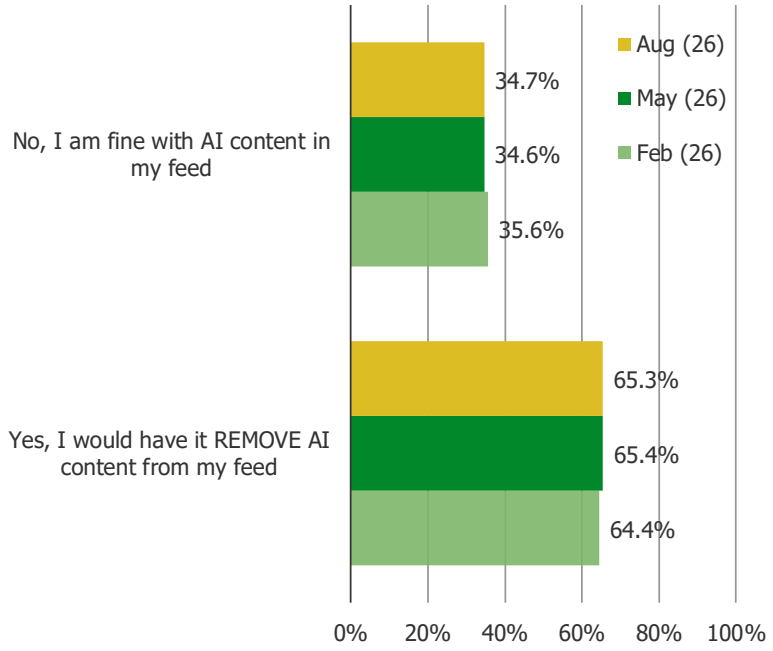
HOW OFTEN HAVE YOU COME ACROSS AI-GENERATED MUSIC IN YOUR FEED ON THE FOLLOWING?

Posed to respondents who use the below.

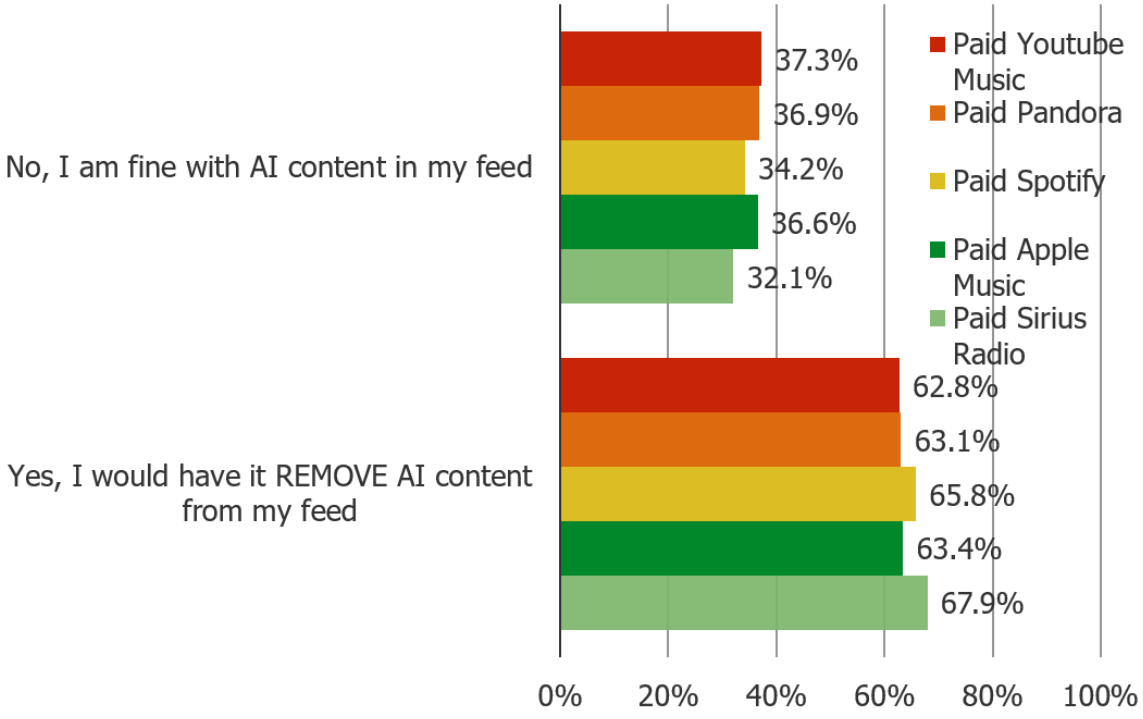


IF THERE WAS A "FILTER OUT AI BUTTON" IN YOUR STREAMING MUSIC PLATFORM SETTINGS, WOULD YOU CHOOSE TO USE IT?

Posed to all respondents.

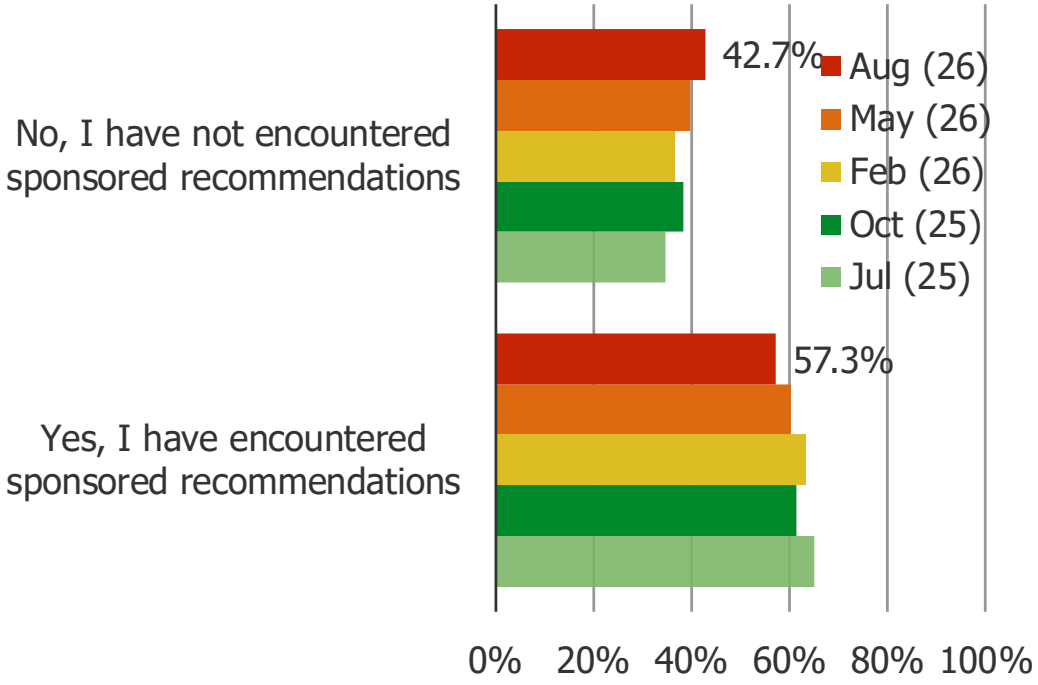


Cross-Tab Analysis: Posed to Paid Users of Each Platform…

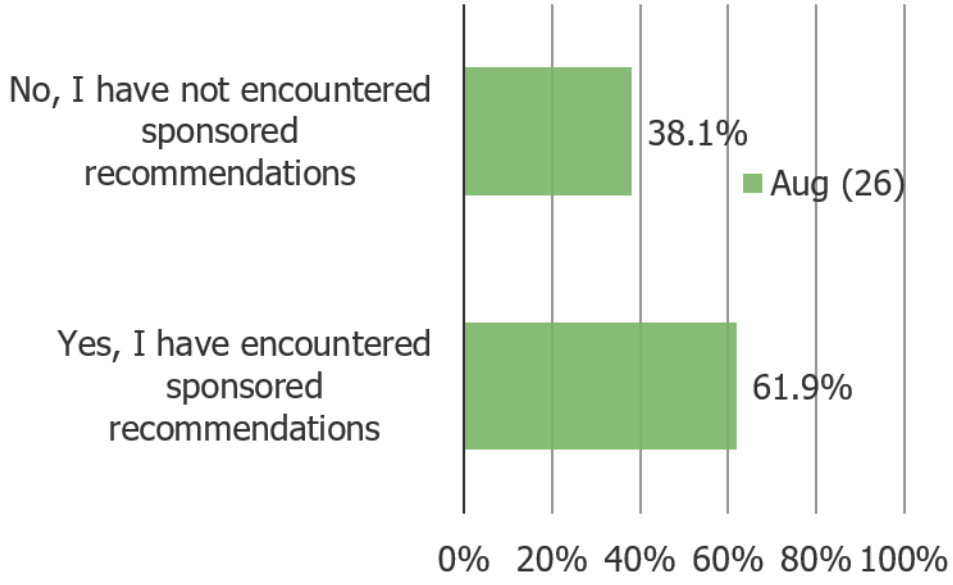


WHILE USING THE SPOTIFY APP, HAVE YOU ENCOUNTERED SPONSORED RECOMMENDATIONS IN YOUR HOME PAGE? SPONSORED RECOMMENDATIONS ARE SMALL POP-UPS IN YOUR HOME PAGE THAT SHOW MUSIC SUGGESTIONS AND SAY "SPONSORED RECOMMEDNATION" NEAR IT.

Posed to respondents who use Spotify (N = 358)

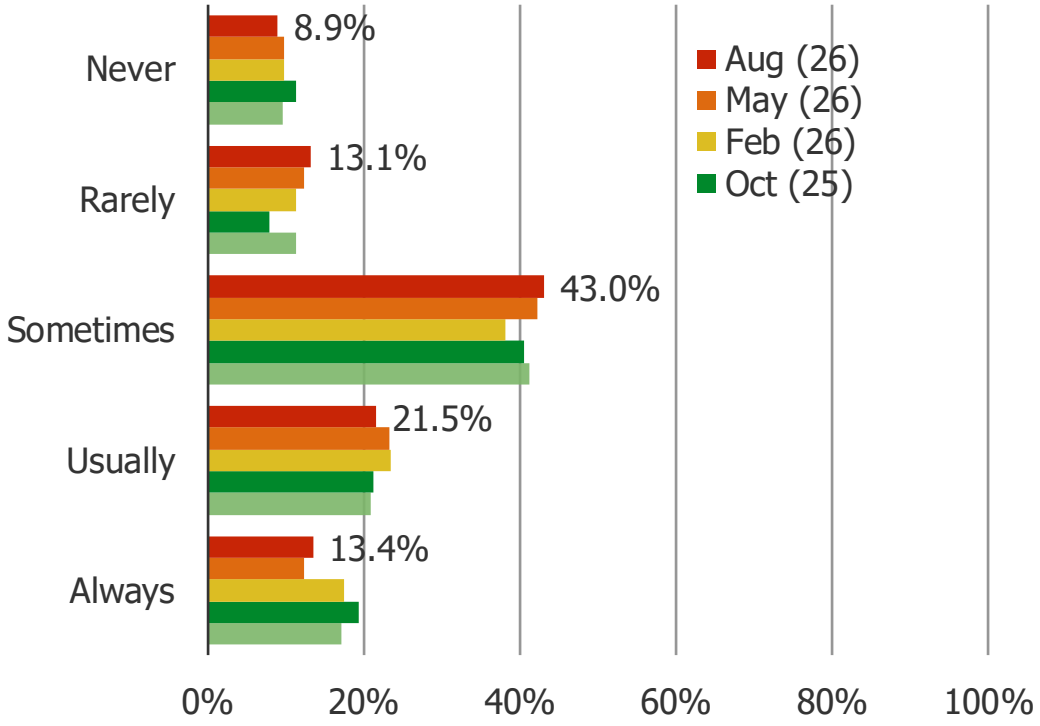


Filter: Paying Spotify Subscribers (N = 210)

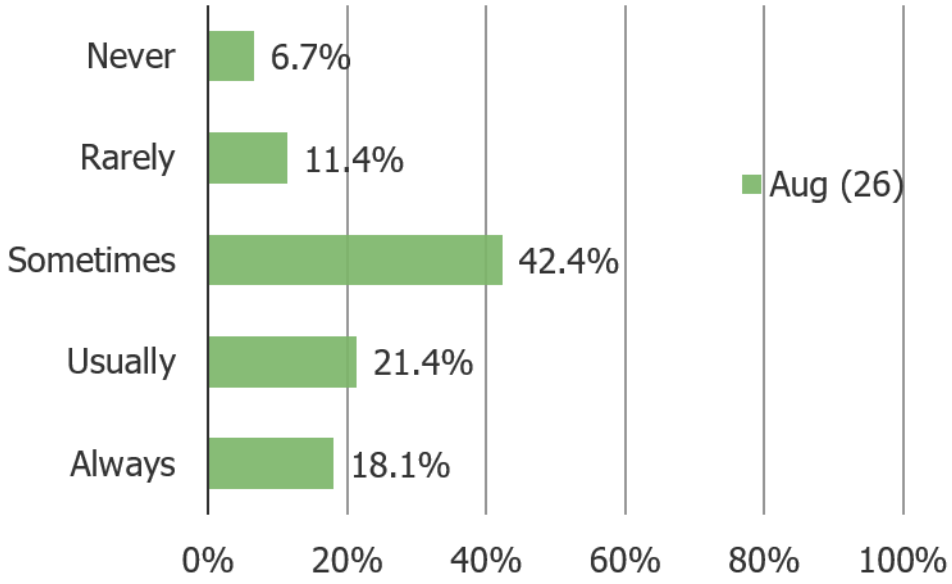


WHEN YOU ENCOUNTERED SPONSORED POSTS, HOW OFTEN HAVE THEY BEEN OF ARTISTS THAT YOU TYPICALLY LISTEN TO MUSIC FROM?

Posed to respondents who use Spotify (N = 358)

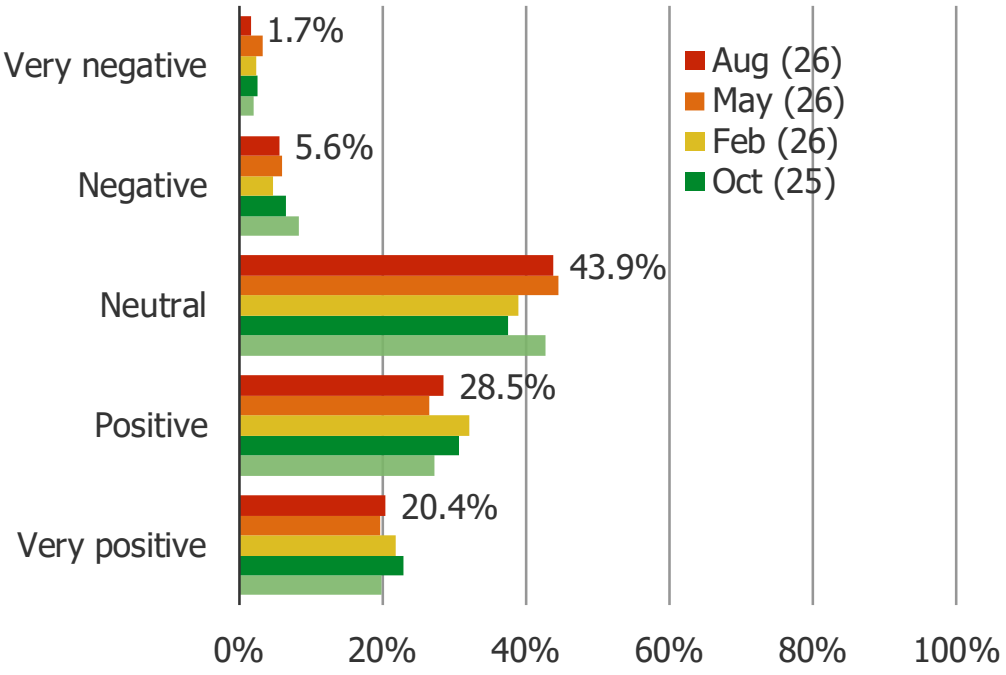


Filter: Paying Spotify Subscribers (N = 210)

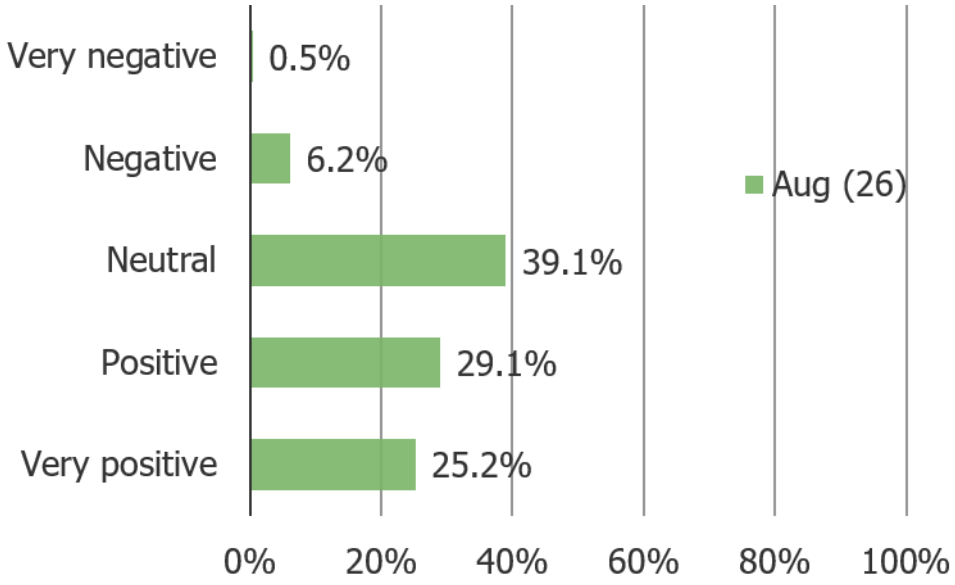


WHAT IS YOUR OPINION OF SPONSORED RECOMMENDATIONS IN THE SPOTIFY HOME PAGE?

Posed to respondents who use Spotify (N = 358)

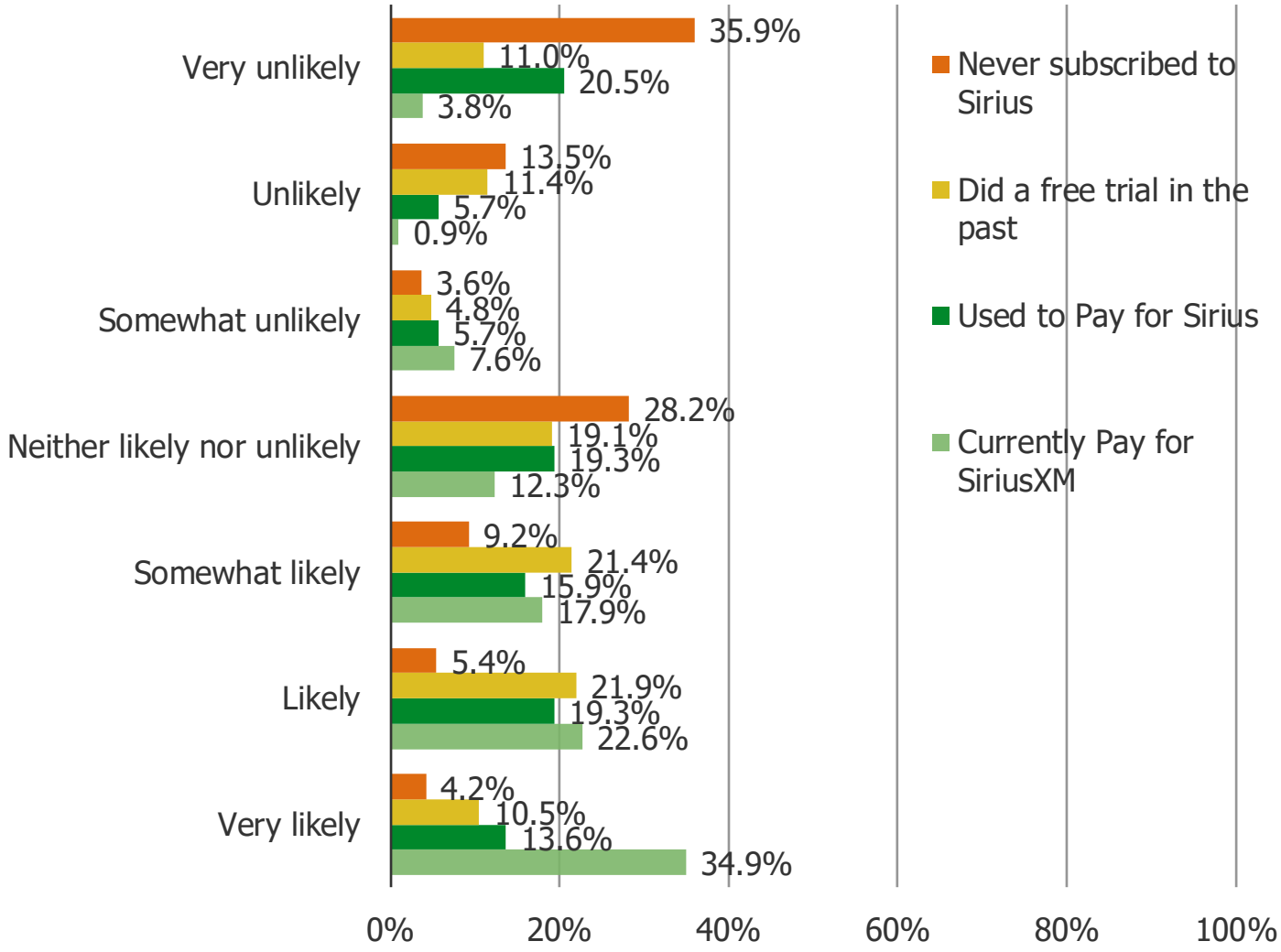


Filter: Paying Spotify Subscribers (N = 210)



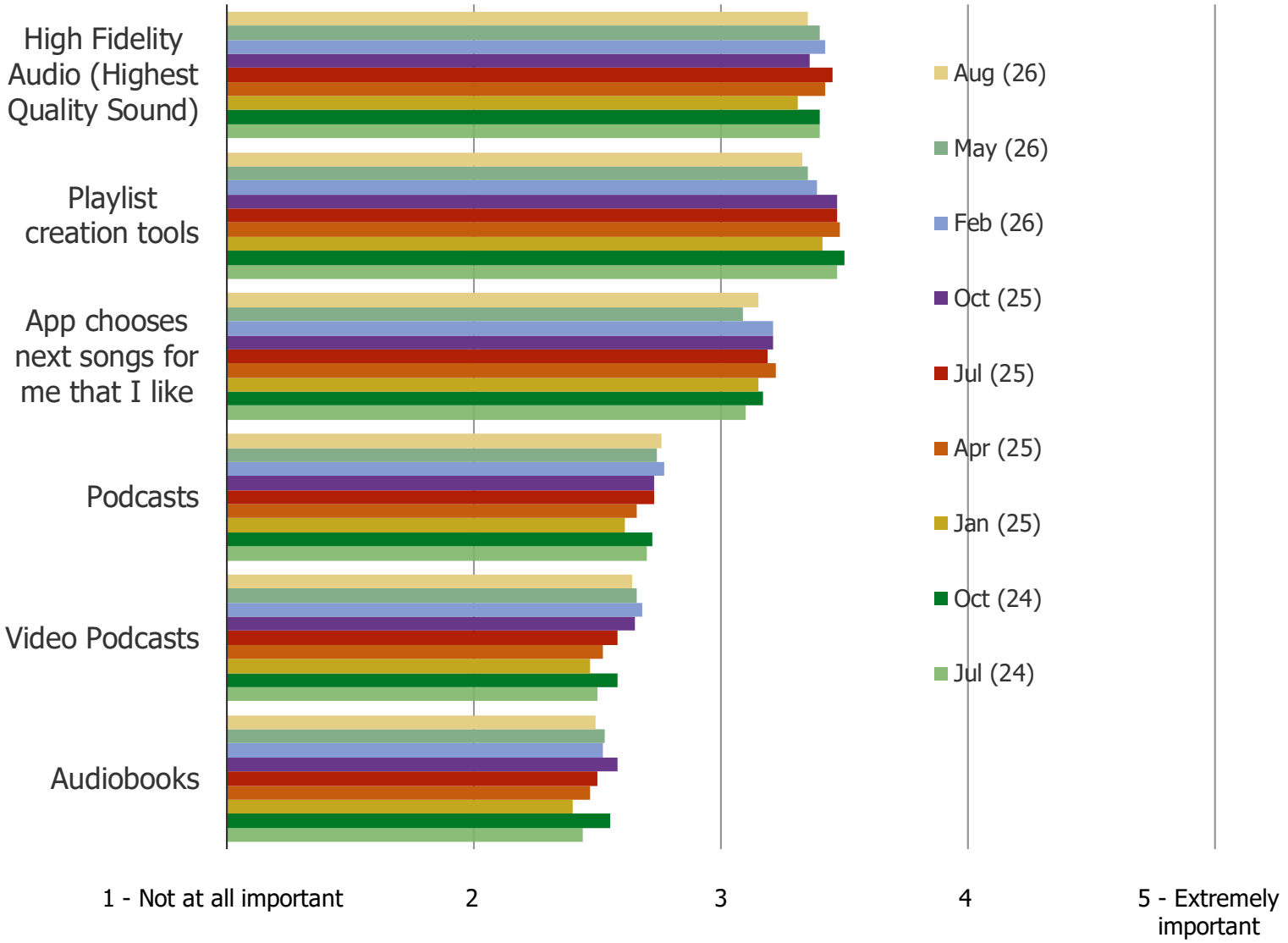
IF SIRIUSXM OFFERED A CHEAPER SUBSCRIPTION PLAN THAT INCLUDED OCCASIONAL ADS, HOW LIKELY WOULD YOU BE TO CONSIDER SUBSCRIBING?

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



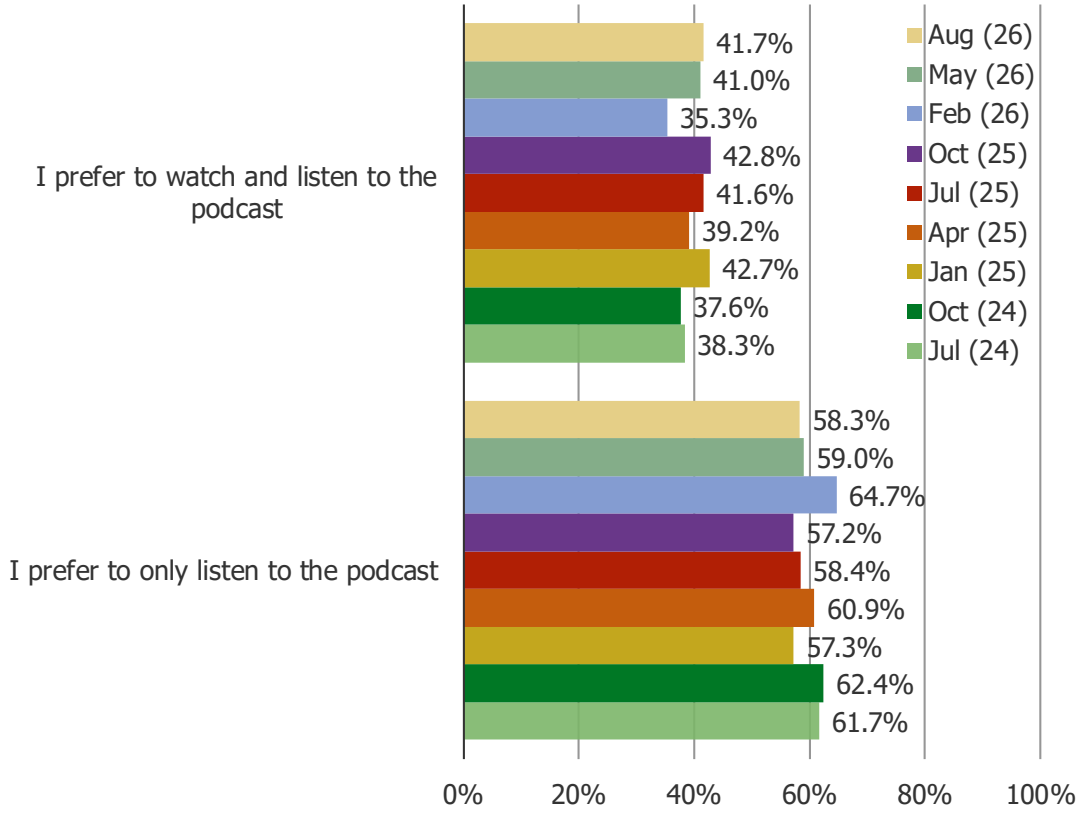
HOW IMPORTANT ARE THE FOLLOWING FEATURES TO YOU IN A MUSIC/AUDIO APP?

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:

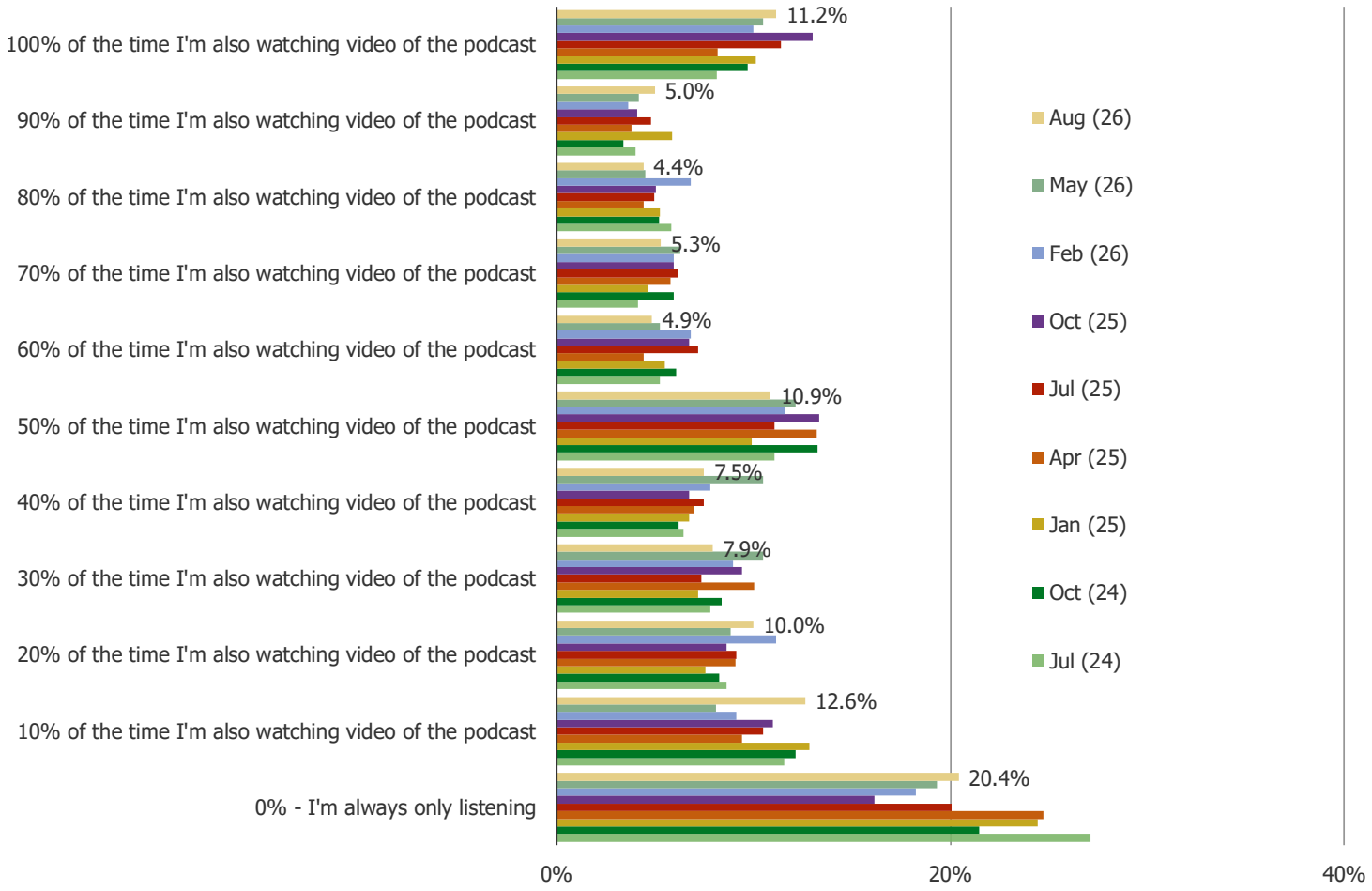
- Multitasking (driving, cleaning, working)
- Mobility/convenience
- Background listening
- Work restrictions

Video Preferences:

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

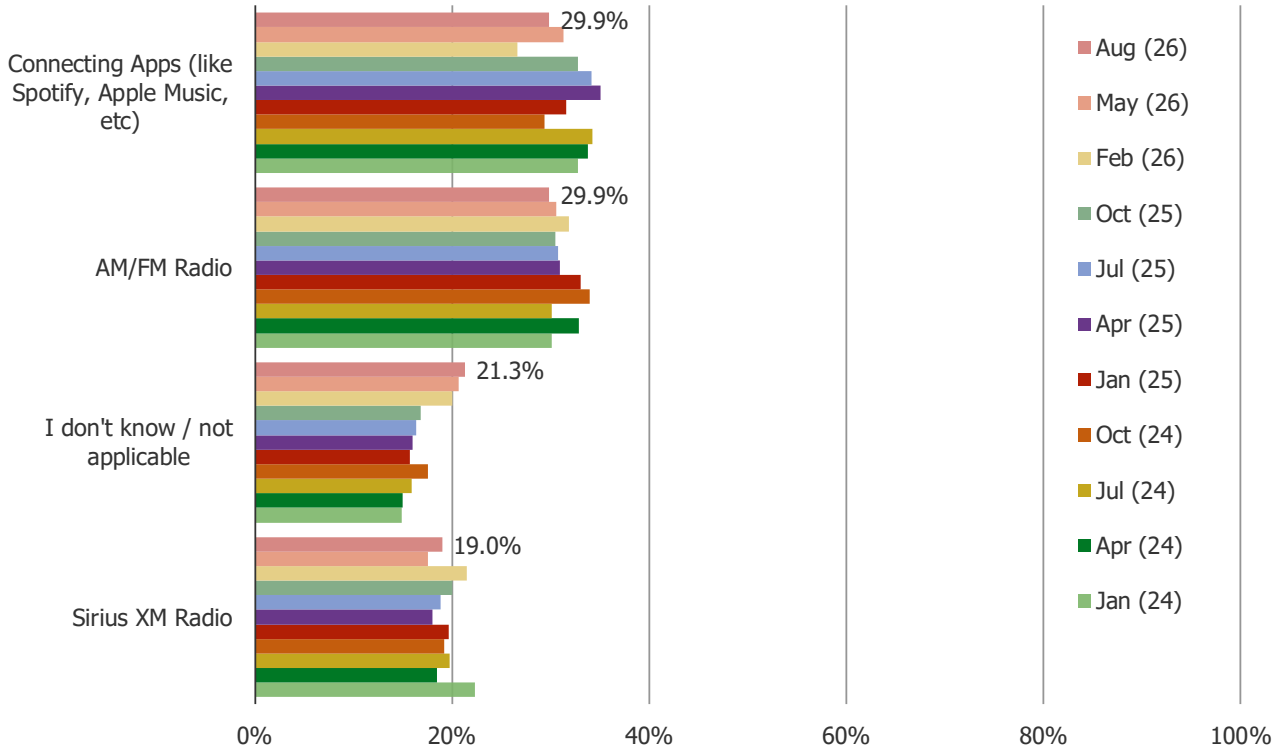
WHAT PERCENTAGE OF THE TIME THAT YOU ARE LISTENING TO PODCASTS ARE YOU WATCHING VIDEO OF THE PODCAST?

Posed to all respondents who listen to podcasts.

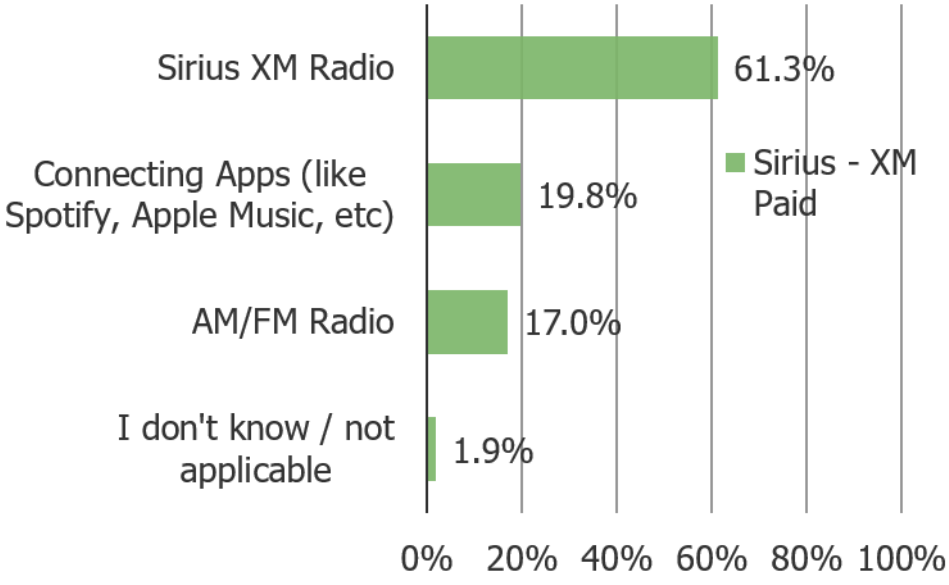


IN YOUR OPINION, WHICH IS BEST FOR LISTENING IN THE CAR?

Posed to all respondents.



Posed to paid Sirius XM users (August 26).



STREAMING PLATFORM DECISION CATALYSTS AND CRITERIA

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

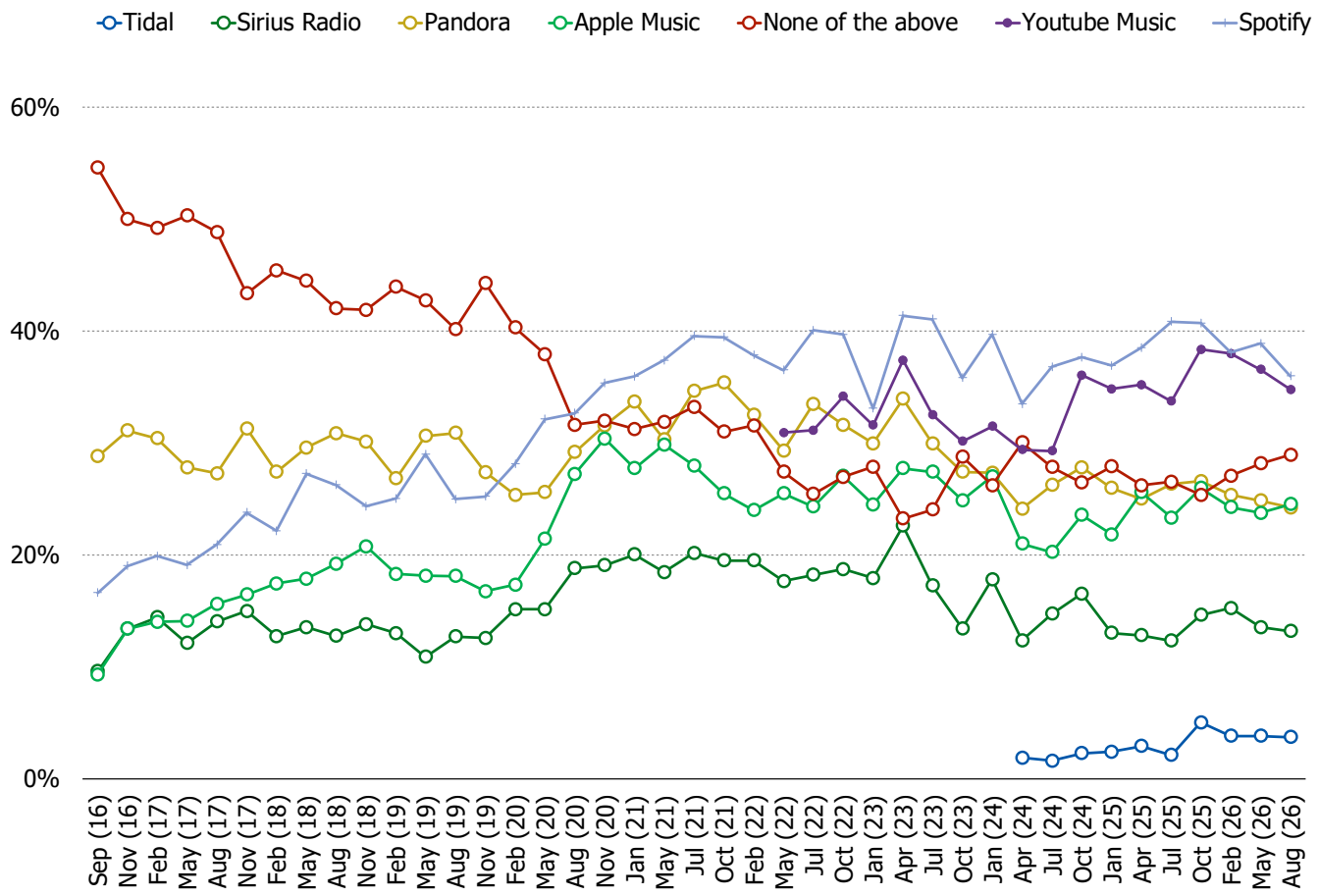
Posed to respondents who have an account with one or more streaming audio platforms.

Category	% of Total Responses	Key Terms & Groupings Captured
Pricing, Value & Ad-Free Experience	22.35%	Price, free, ads, commercials, cheap, affordable, subscription
Other / Unclassified	22.34%	Ambiguous, generic, or bot-like responses
Variety, Selection & Content Library	21.17%	Variety, selection, catalog, wide range, podcasts, movies
General Positive Sentiment	8.06%	Good, great, awesome, love it, interesting, captivating
Ease of Use & Interface	6.37%	Easy, convenient, simple, accessible, user-friendly, navigation
Sound & Audio Quality	5.42%	Quality, sound, audio, high-res, fidelity, clear
Invalid / Unsure / Noise	4.65%	"Not sure," "I don't know," "no opinion," "NA"
Mentioned Specific Platform	3.79%	Spotify, Apple, Pandora, YouTube, Sirius
Customization, Playlists & Searchability	2.88%	Playlists, customization, recommendations, algorithm, on-demand
Specific Artists, Songs & Exclusives	1.84%	Artists, bands, specific songs, exclusive content
Reliability, Offline & Background Play	1.14%	Reliable, offline, downloads, stable, background, "screen off"

COMPETITIVE DYNAMICS, STREAMING APPS

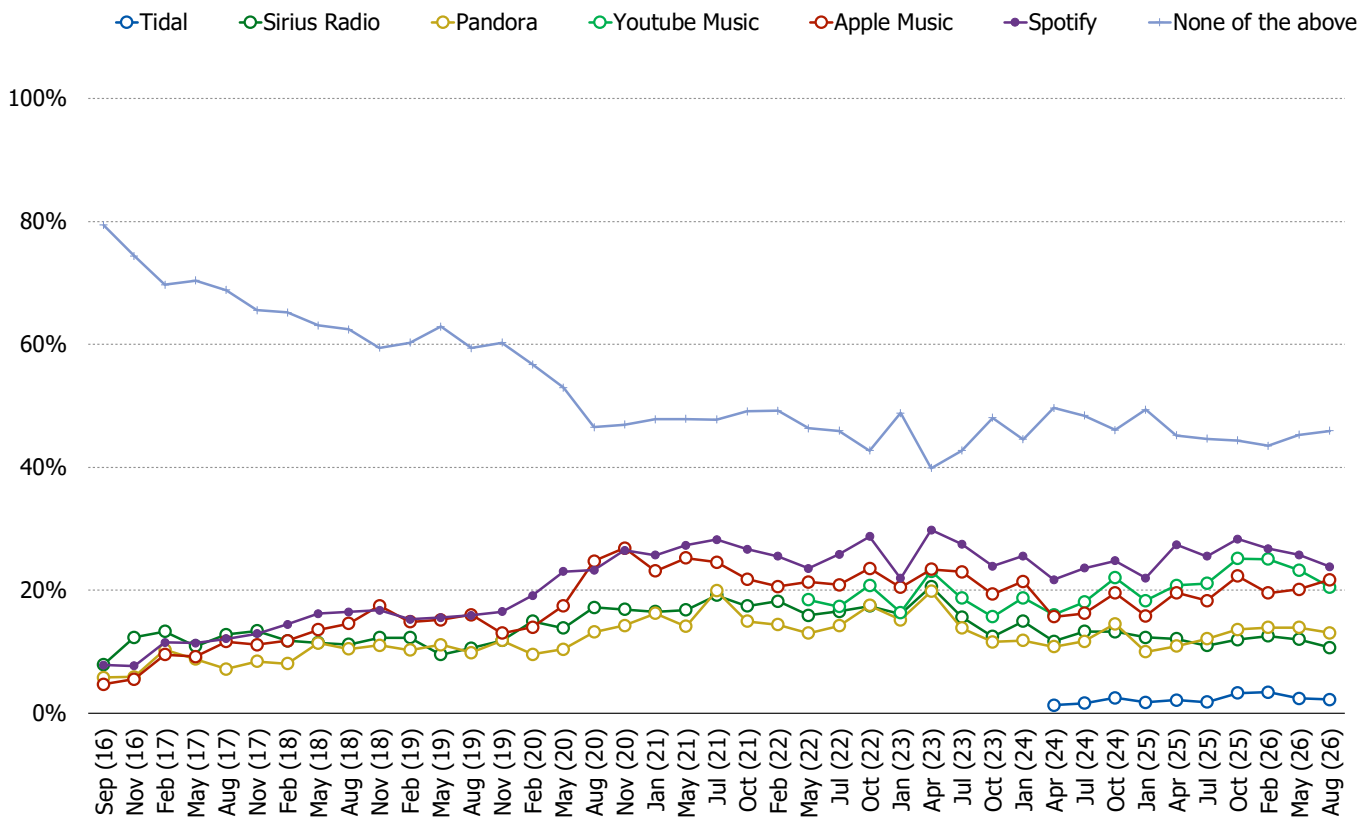
QUARTERLY SURVEY: DO YOU HAVE AN ACCOUNT WITH ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.



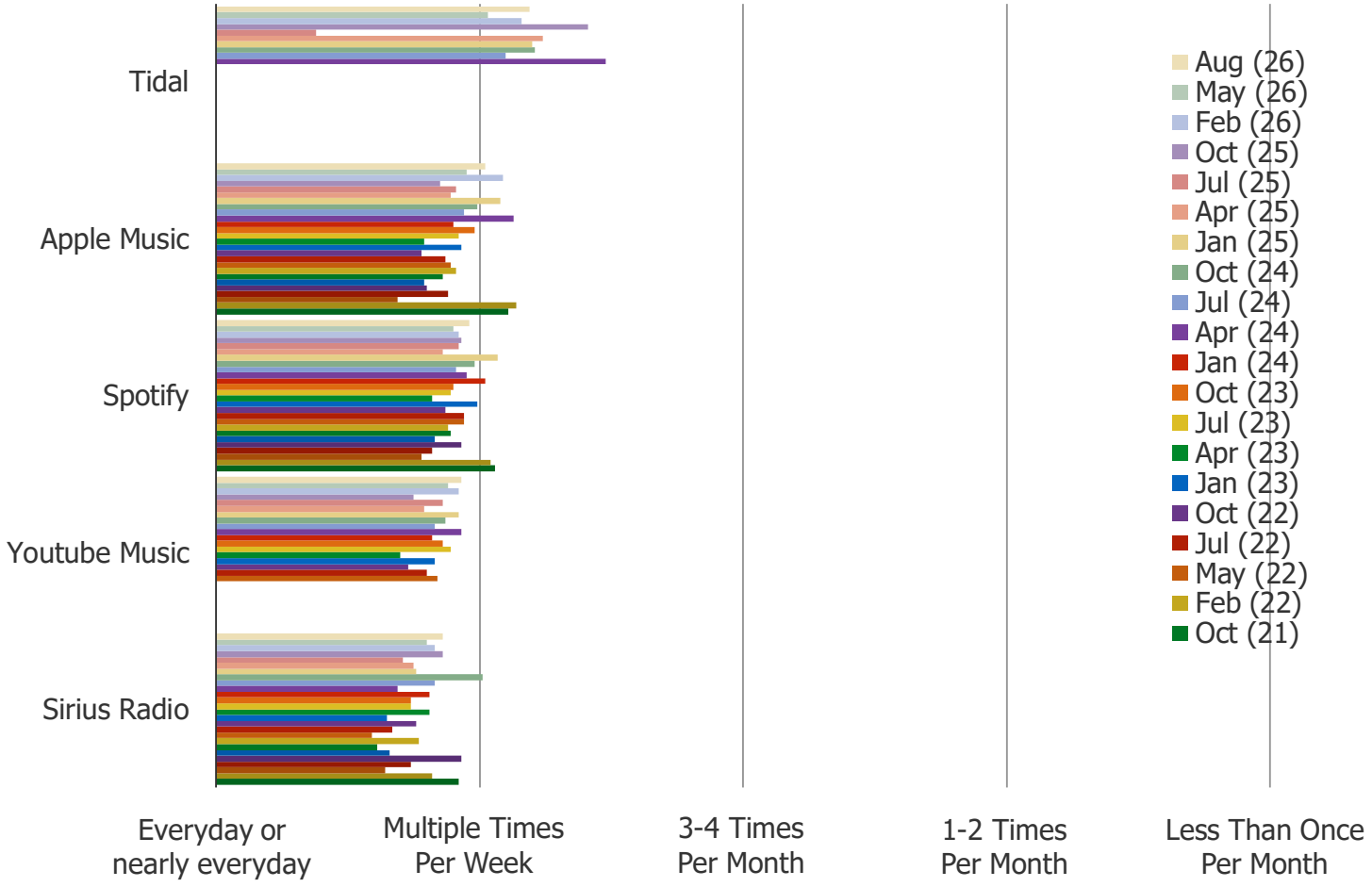
QUARTERLY SURVEY: ARE YOU CURRENTLY PAYING FOR A SUBSCRIPTION WITH ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents.



HOW OFTEN DO YOU USE THE FOLLOWING?

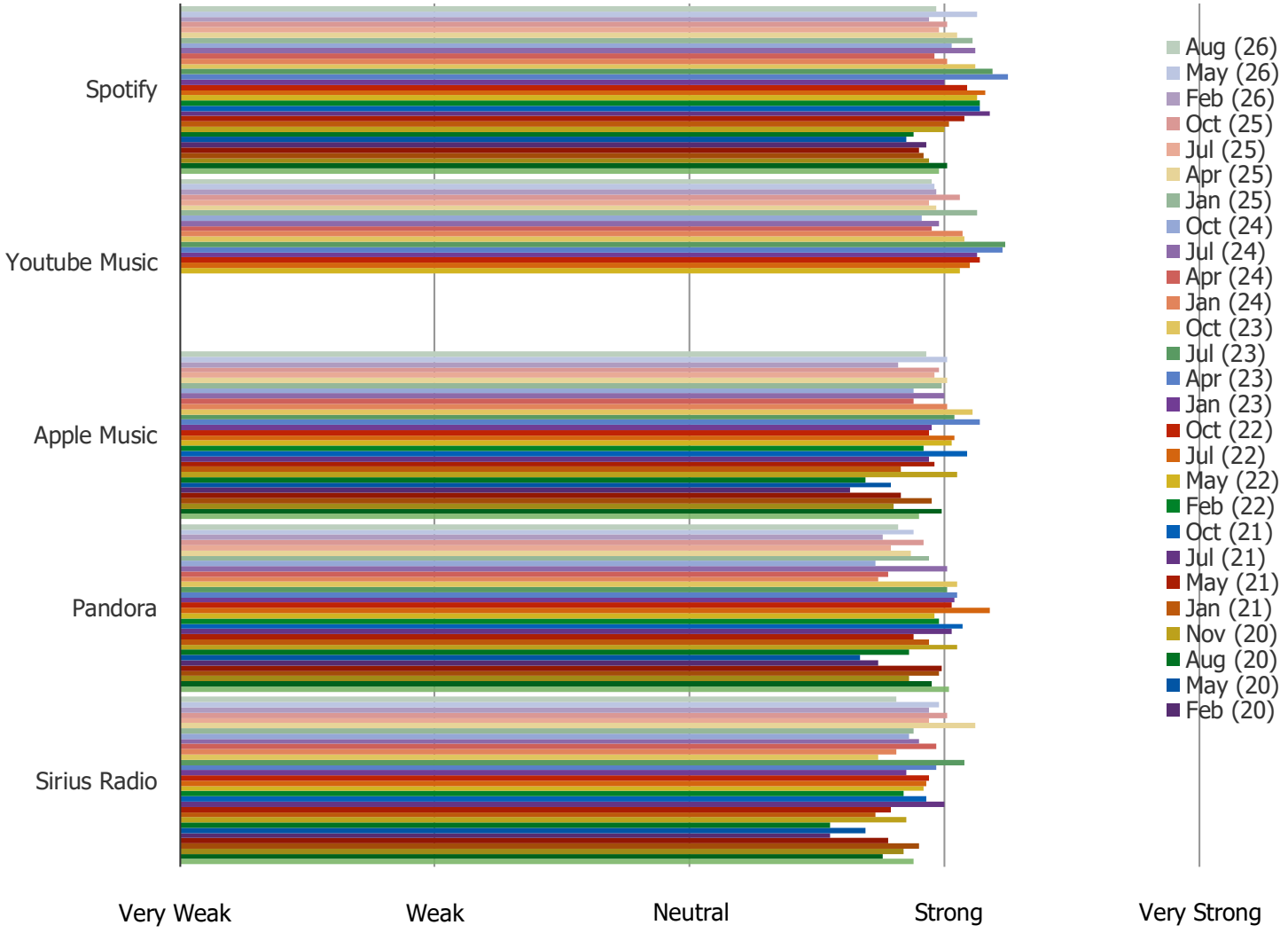
Respondents who have an account with each platform (free or paid)



More Frequent

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

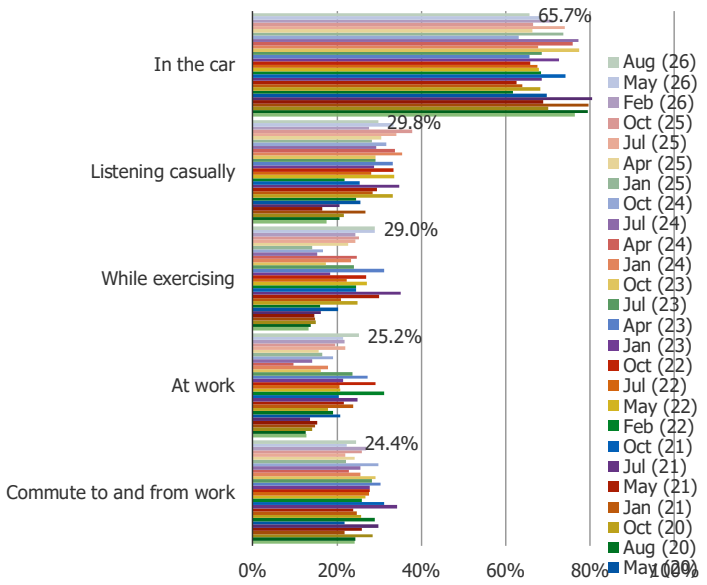
Respondents who pay for each platform



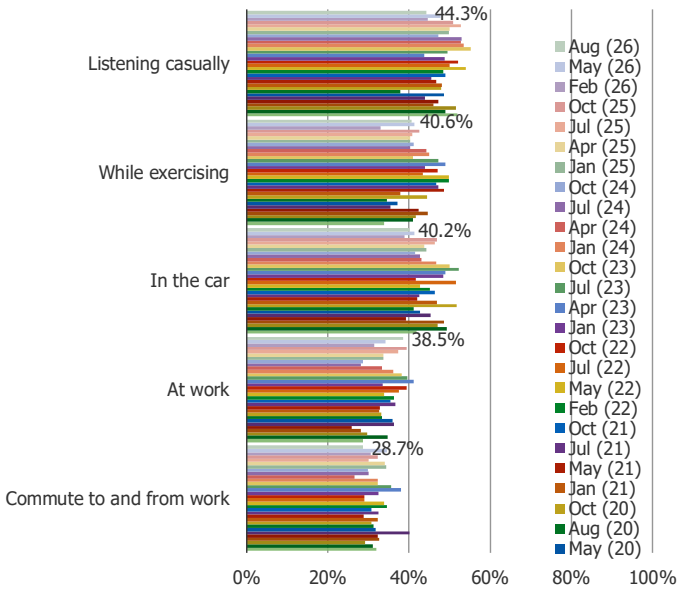
WHERE DO YOU TYPICALLY LISTEN TO THIS PLATFORM? (SELECT ALL THAT APPLY)

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

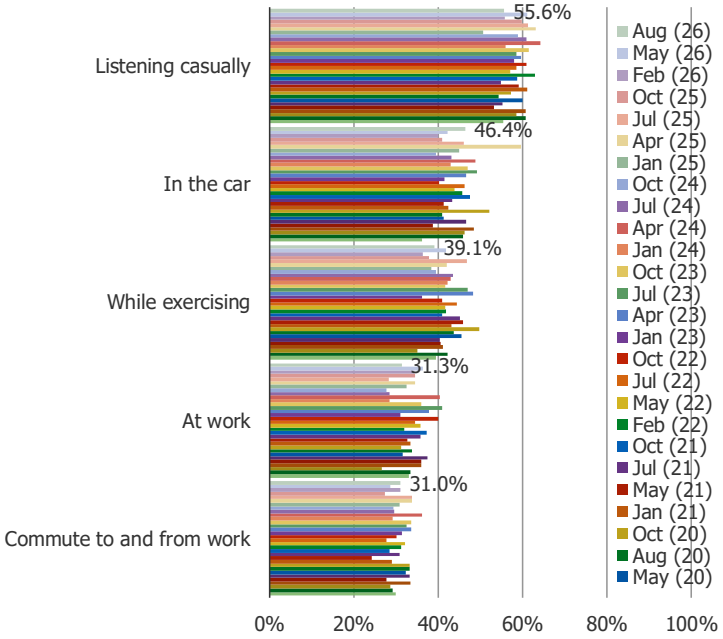
SIRIUS XM



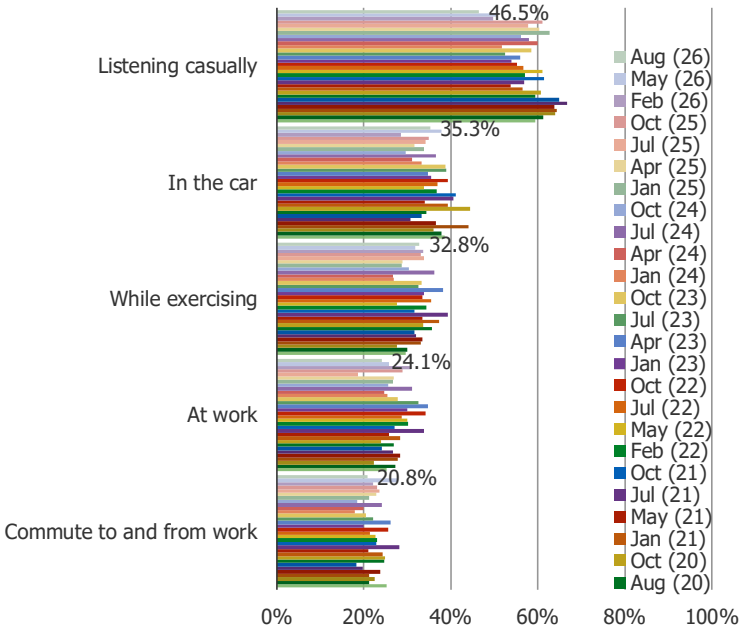
APPLE MUSIC



SPOTIFY

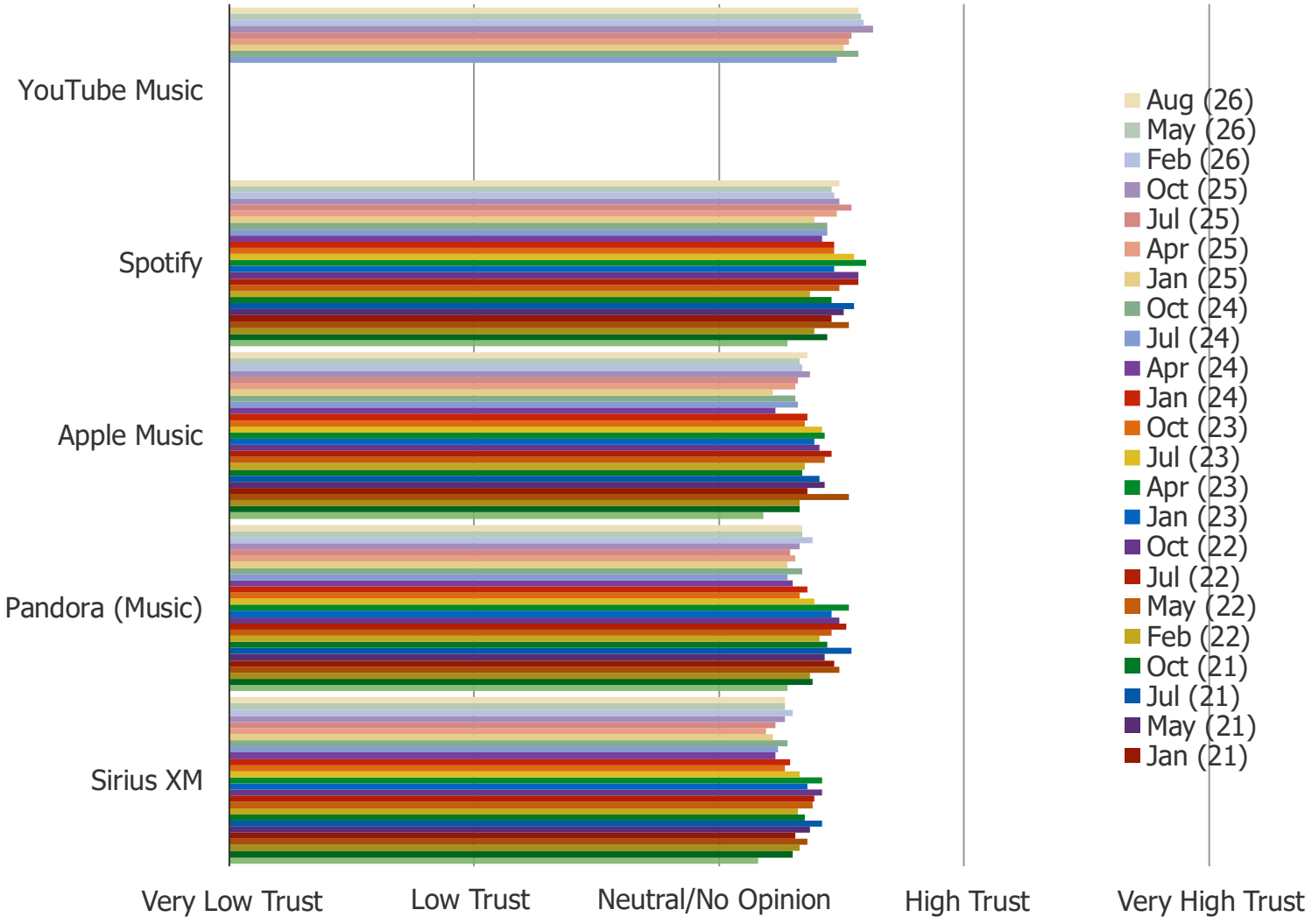


PANDORA



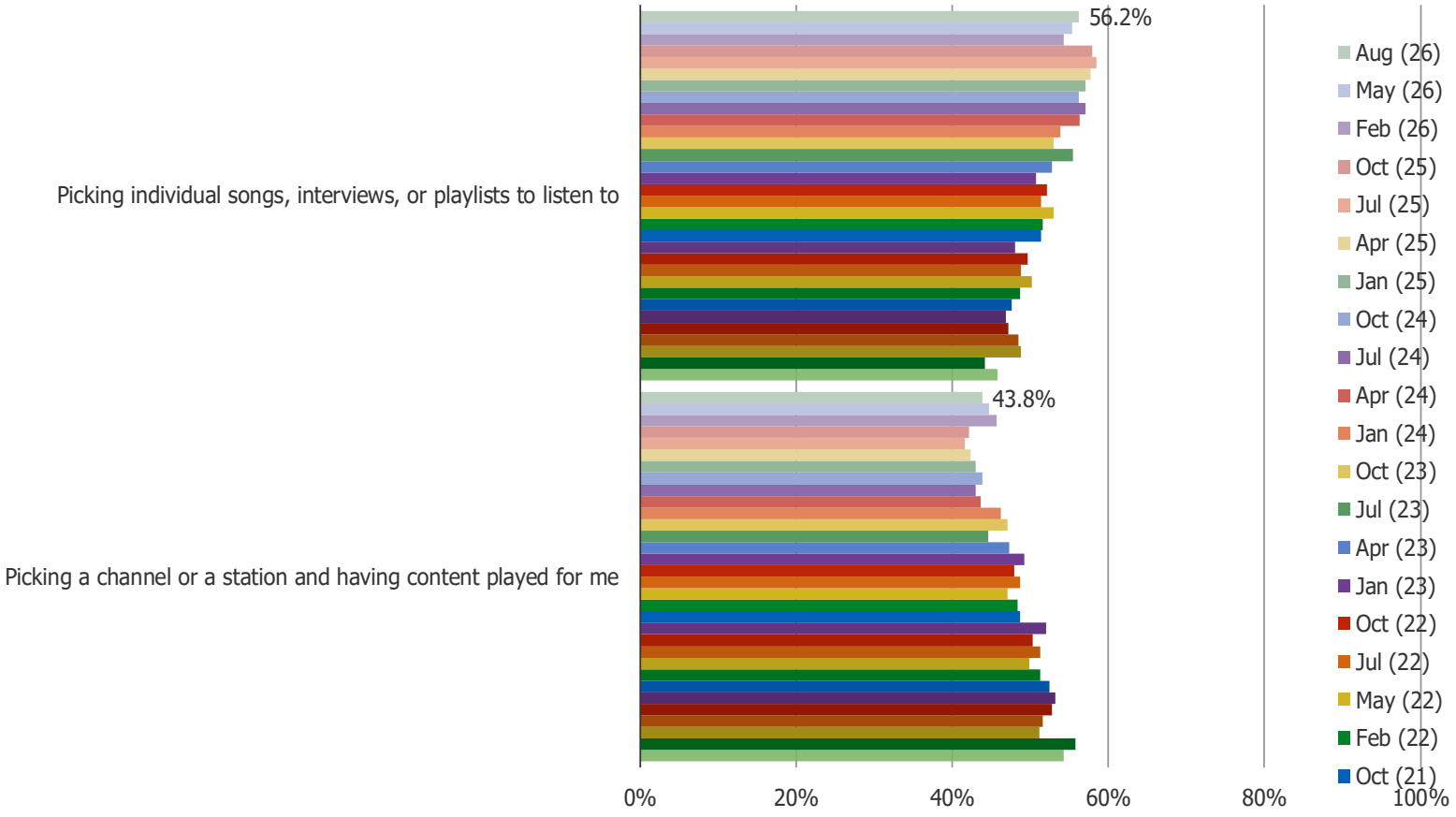
HOW MUCH TRUST WOULD YOU SAY YOU HAVE IN THE FOLLOWING BRANDS?

Posed to all respondents



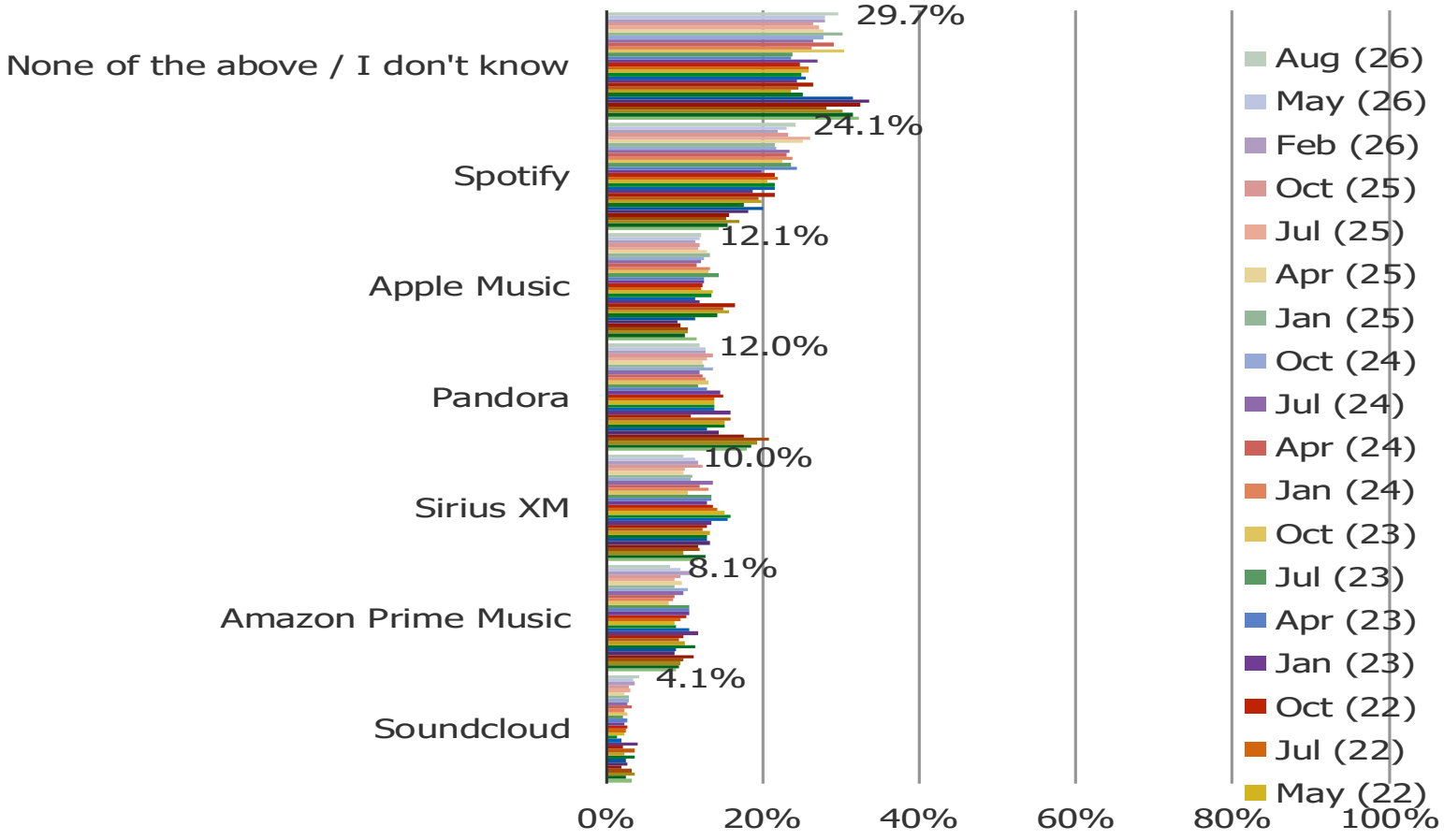
FOR LISTENING TO MUSIC AND TALK-SHOW CONTENT, WHICH IS BETTER?

Posed to all respondents.



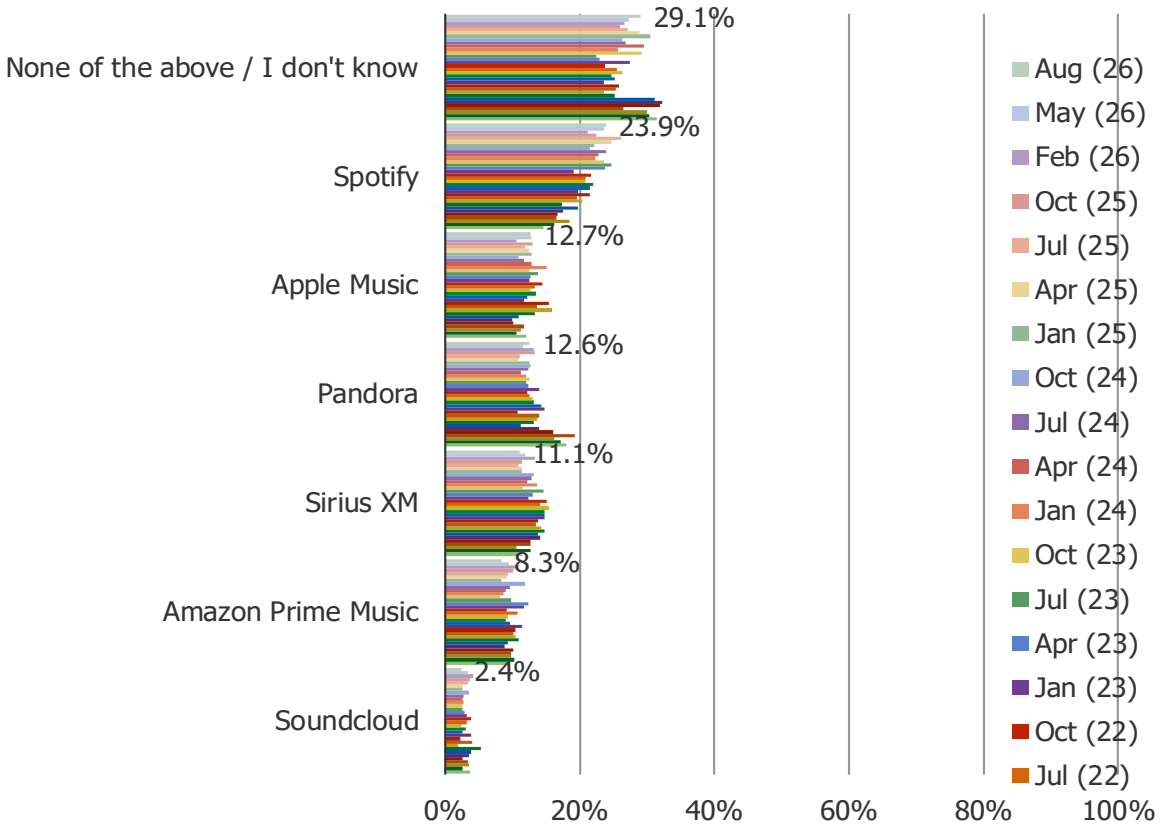
IN YOUR OPINION, WHICH PLATFORM IS BEST WHEN IT COMES TO THE WAY IN WHICH THEY DELIVER CONTENT TO ITS USERS? (IE. THE BEST USER EXPERIENCE)

Posed to all respondents.



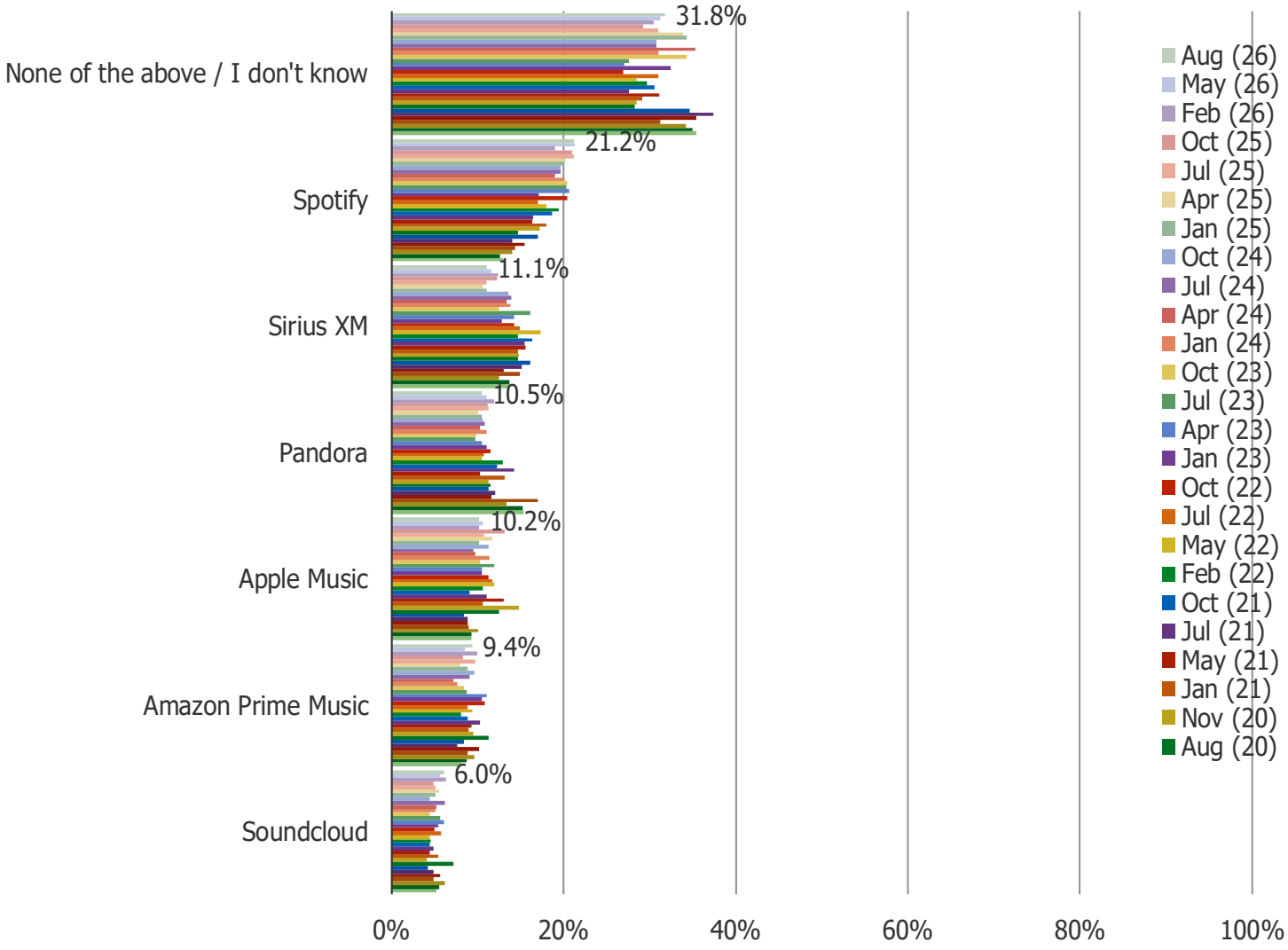
IN YOUR OPINION, WHICH PLATFORM HAS THE BEST CONTENT AVAILABLE?

Posed to all respondents.



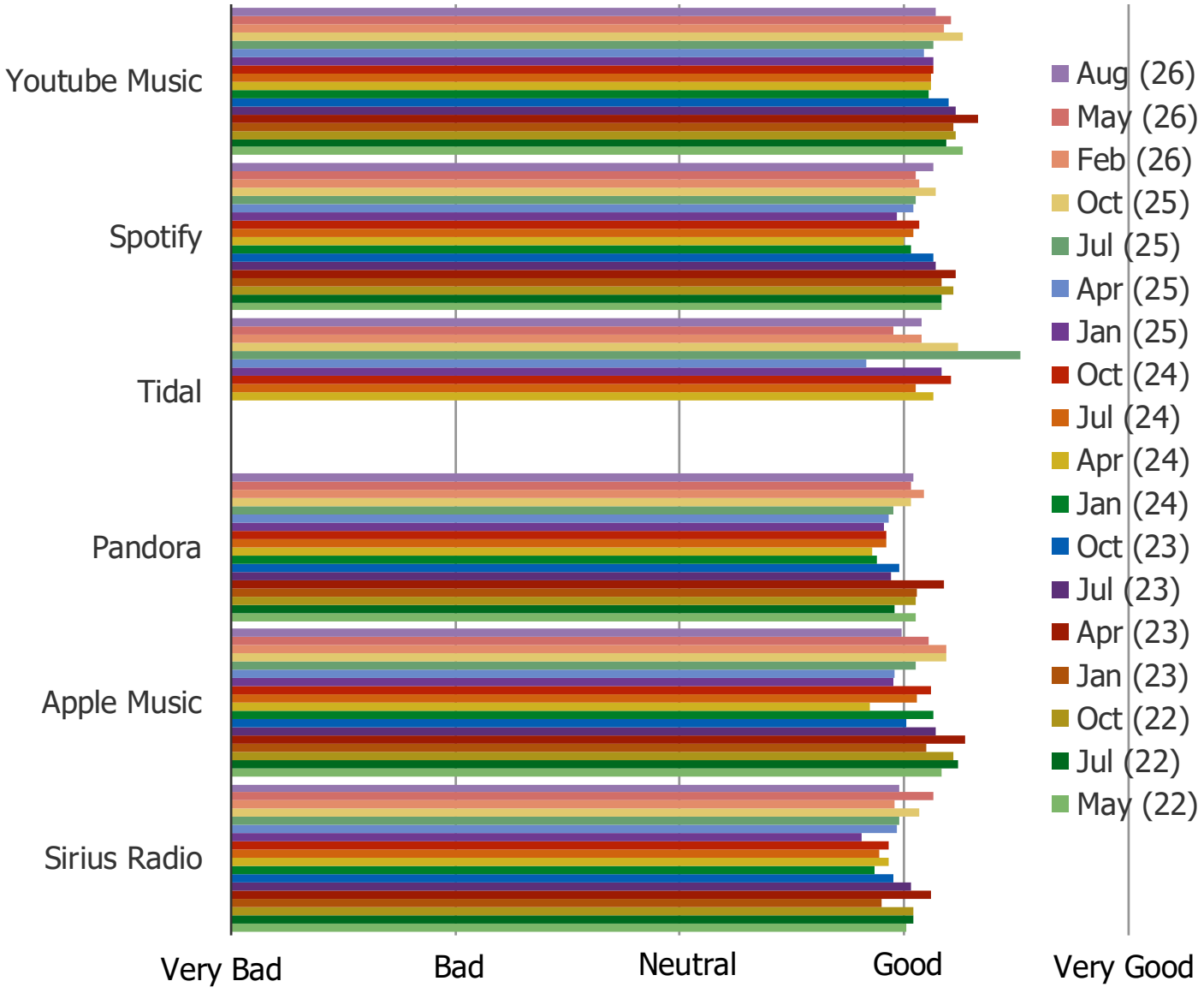
IN YOUR OPINION, WHICH PLATFORM HAS THE MOST UNIQUE CONTENT AVAILABLE THAT YOU CAN'T FIND ANYWHERE ELSE?

Posed to all respondents.



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

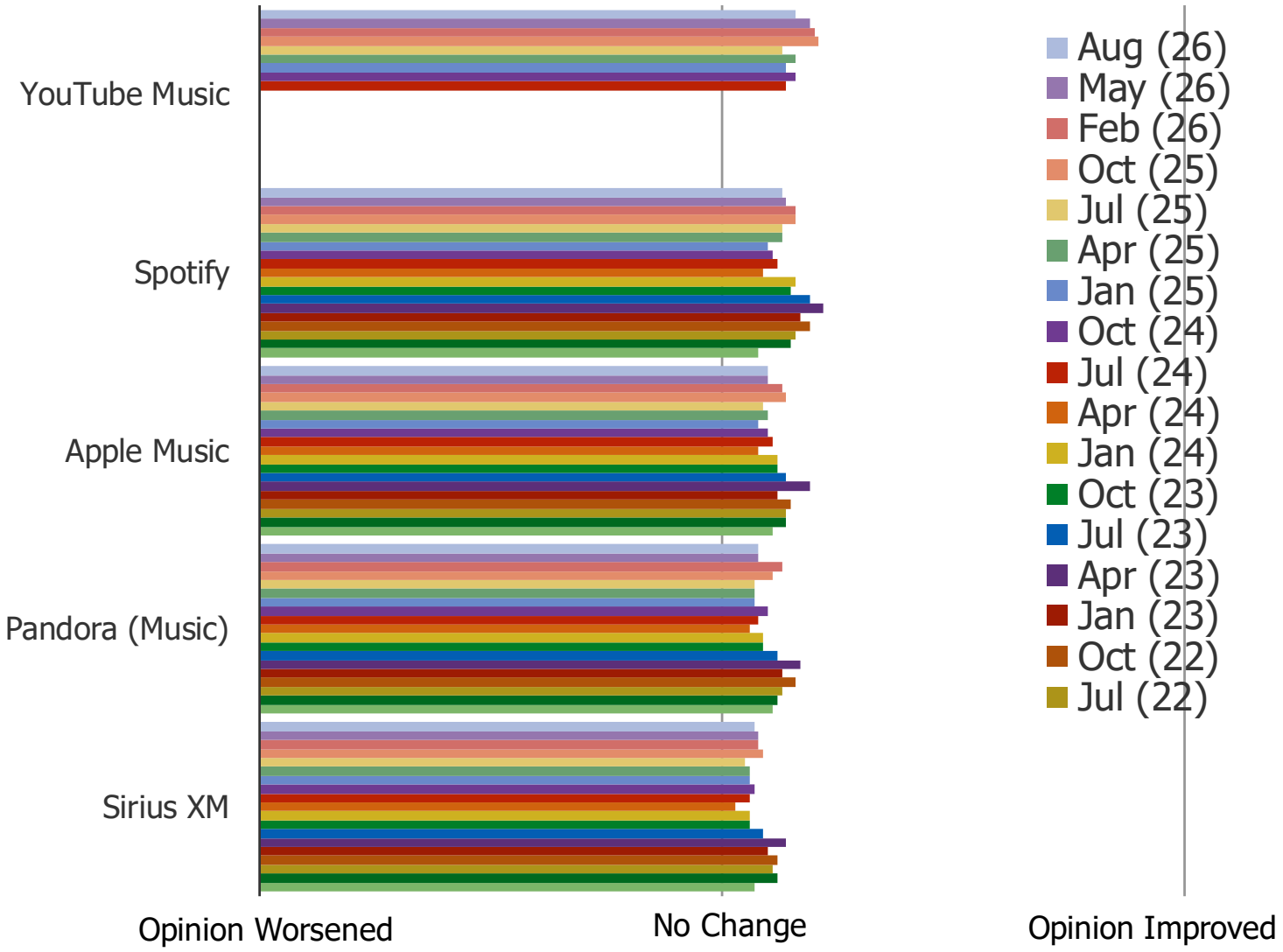
Posed to users of each of the following.



	N=
Sirius Radio	131
Apple Music	244
Spotify	358
Pandora	241
Youtube Music	346
Tidal	37

HAS YOUR OPINION OF ANY OF THE FOLLOWING CHANGED RECENTLY?

Posed to all respondents.

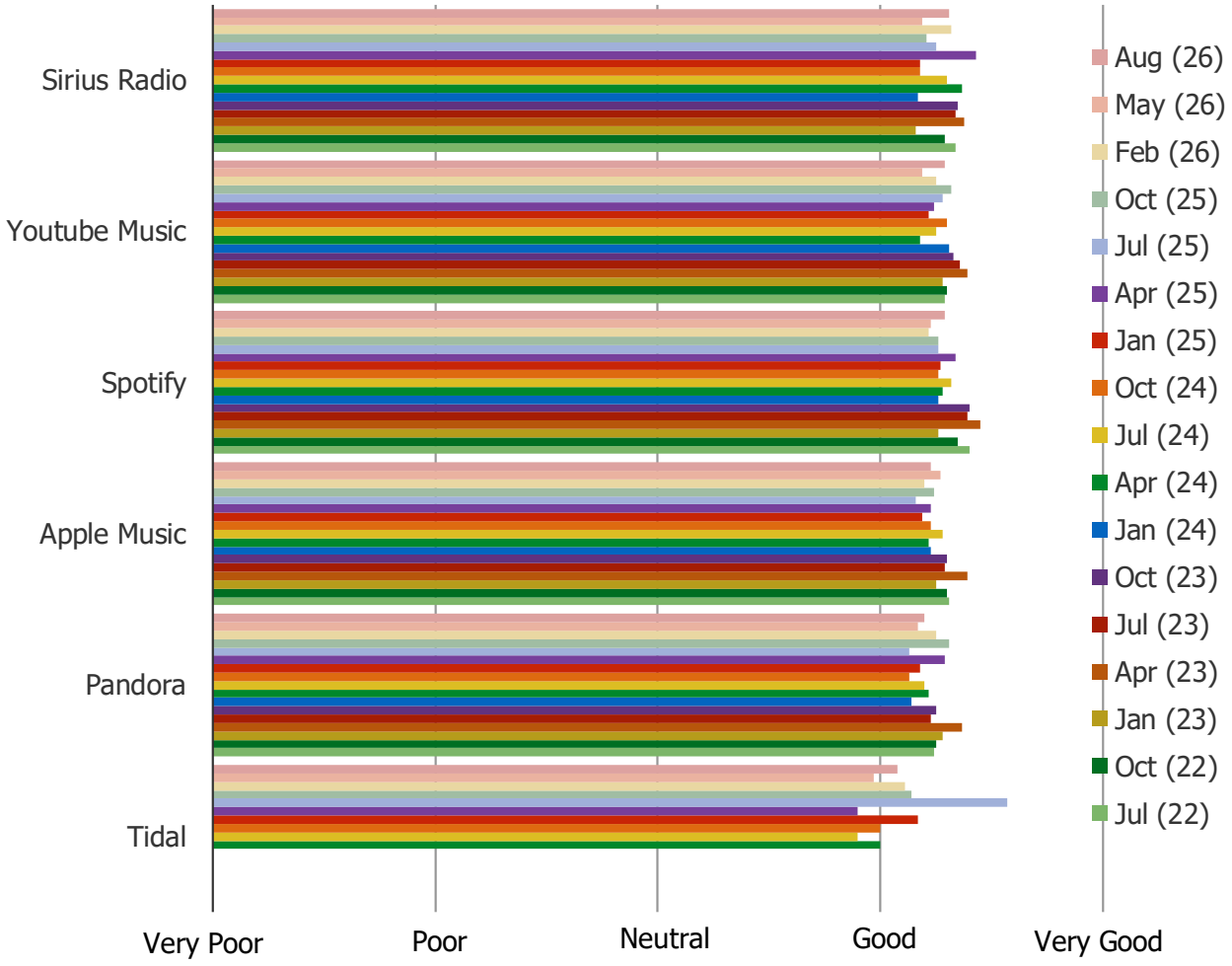


HAS YOUR OPINION OF ANY OF THE FOLLOWING CHANGED RECENTLY? OPTIONAL COMMENTS SUMMARIZED

Category	Spotify	Apple Music	YouTube	Pandora (Music)	Sirius XM
Other / Unclassified	23.1%	23.6%	27.7%	34.7%	31.1%
General Improvement & Positive Sentiment	**22.7%**	**25.6%**	**23.6%**	**17.3%**	**18.1%**
Invalid / Unsure / No Change	17.8%	15.9%	13.2%	15.8%	18.1%
Content Selection & Library Expansion	8.9%	11.8%	**15.7%**	**17.3%**	**15.0%**
Pricing & Ads (Too Many Ads or Better Value)	**10.7%**	8.7%	9.5%	5.1%	6.7%
Improved Audio Quality	8.0%	7.2%	5.4%	5.1%	4.1%
Playlists, Discovery & Features	4.0%	3.1%	2.5%	2.0%	1.0%
Corporate Ethics & Political Stance	1.8%	2.1%	0.8%	0.5%	1.6%
General Negative Sentiment	1.3%	1.5%	0.4%	1.5%	2.1%
App Interface & Performance	1.8%	0.5%	1.2%	0.5%	2.1%

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

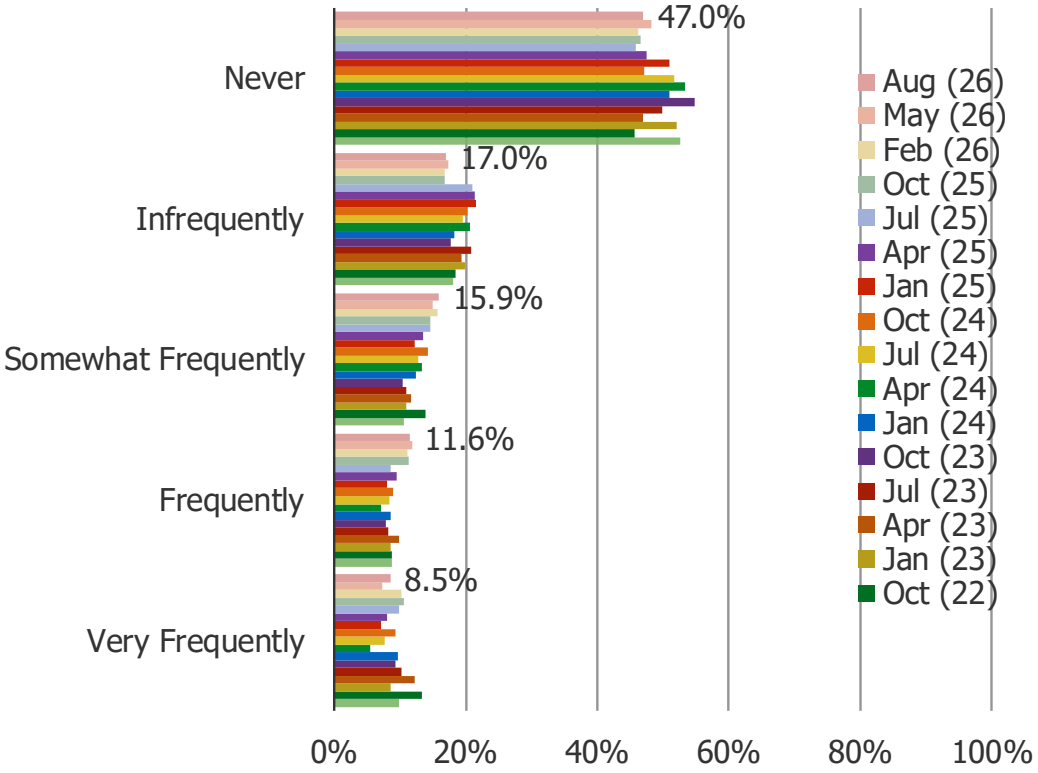
Posed to users of each of the following.



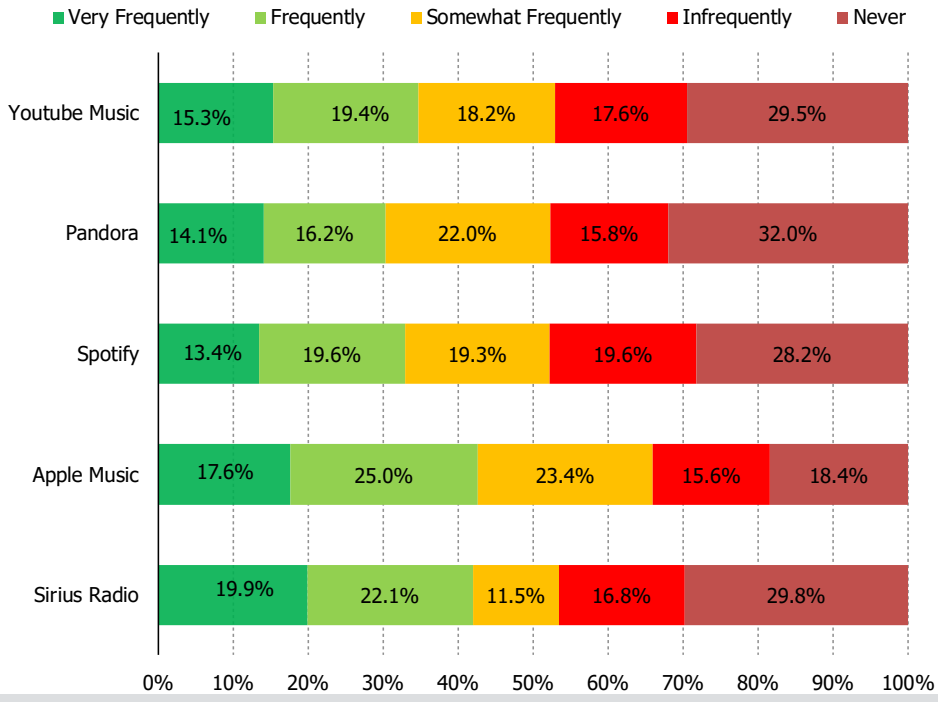
	N=
Sirius Radio	131
Apple Music	244
Spotify	358
Pandora	241
Youtube Music	346
Tidal	37

HOW OFTEN DO YOU LISTEN TO AUDIOBOOKS?

Posed to all respondents.

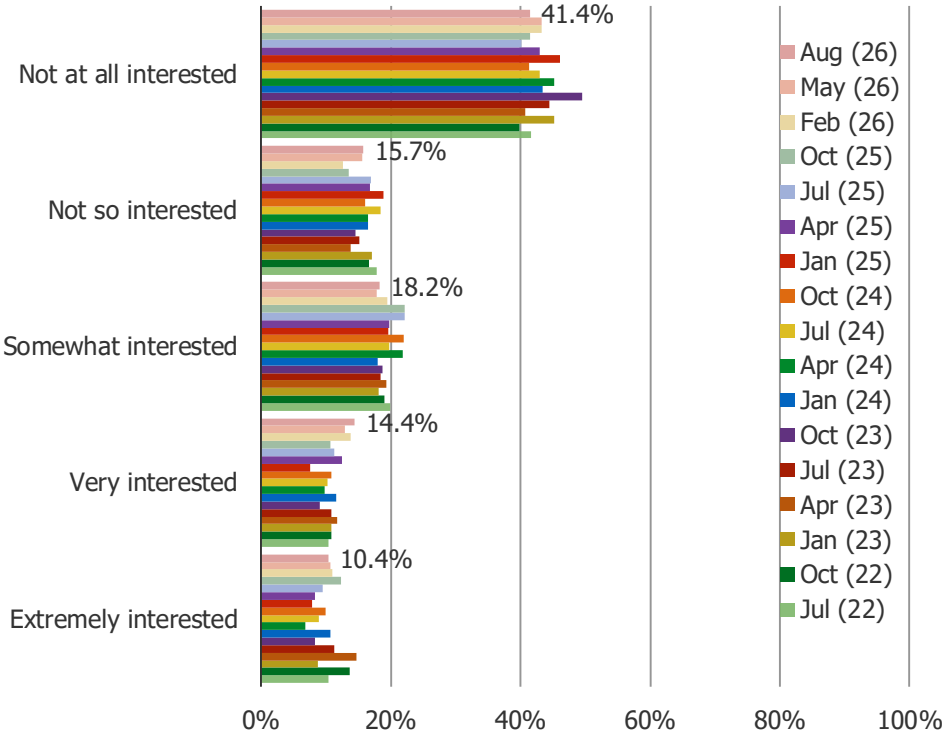


Cross-Tab Analysis: How often users of the following listen to audiobooks in general

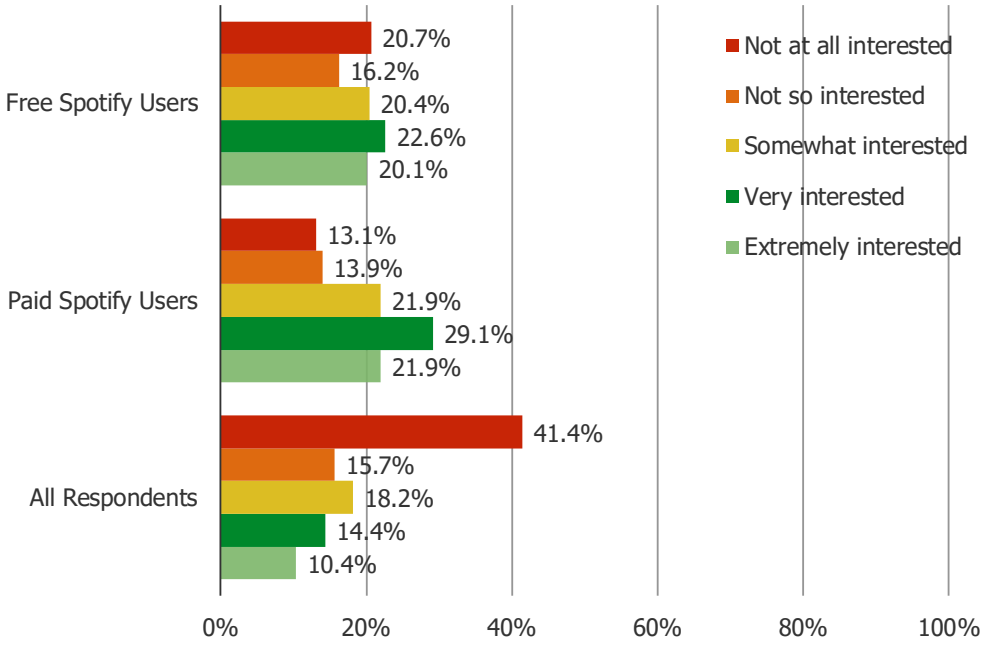


PLEASE EVALUATE YOUR INTEREST LEVEL IN BEING ABLE TO LISTEN AUDIOBOOKS ON SPOTIFY?

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.

A. Music

When consumers think of music streaming, **Spotify** and **YouTube** lead the market in top-of-mind recall, followed closely by **Pandora** and **Apple Music**.

Platform / Category	Percentage	Count
Spotify	**20.79%**	4,102
Invalid / Unsure / None	15.43%	3,045
YouTube	**14.38%**	2,837
Other / Unclassified	10.00%	1,974
Pandora	**9.05%**	1,786
Apple (Music, Podcasts, iTunes)	**8.09%**	1,596
Specific Genre or Creator (Misunderstood Prompt)	7.29%	1,438
Amazon	**4.58%**	903
Traditional Radio (AM/FM)	**4.43%**	874
SiriusXM	**2.46%**	486
iHeartRadio	**1.67%**	329
SoundCloud	**0.59%**	116
Other Niche Audio Platforms (Tidal, Deezer, etc.)	0.43%	84

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.

B. Podcasts

For podcasts, **Spotify** and **YouTube** are deadlocked as the top platforms, with **Apple Podcasts** taking third place. Over 59% of respondents had no specific podcast platform come to mind, demonstrating higher market fragmentation.

Platform / Category	Percentage	Count
Invalid / Unsure / None	59.71%	11,783
Other / Unclassified	11.15%	2,201
Spotify	**8.32%**	1,641
YouTube	**7.75%**	1,530
Apple (Music, Podcasts, iTunes)	**4.83%**	954
Specific Genre or Creator (e.g., Joe Rogan, True Crime)	2.02%	399
Amazon	**1.67%**	330
iHeartRadio	**0.92%**	182
Social Media & Video Platforms (TikTok, Instagram)	0.82%	161
Pandora	**0.70%**	139
Google	**0.60%**	119
Audible	**0.43%**	84

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.

C. Audiobooks

The audiobook market is overwhelmingly dominated by **Audible** and its parent company **Amazon**, which together command the majority of named platform responses. Specialized library apps (**Libby**, **Hoopla**) also hold a notable share.

Platform / Category	Percentage	Count
Invalid / Unsure / None	73.77%	14,559
Other / Unclassified	9.38%	1,852
Audible	5.32%	1,050
Amazon	3.50%	690
Spotify	1.72%	339
YouTube	1.52%	299
Apple (Music, Podcasts, iTunes)	1.43%	282
Library Apps (Libby, Hoopla)	0.93%	184
Specific Genre or Creator	0.74%	146
Google	0.46%	90

WHAT DO YOU VALUE MOST ABOUT THIS PLATFORM?

Posed to account holders of each of the following platforms.

Table 1: Mainstream Streaming Platforms

Category	Spotify	Apple Music	YouTube
Variety, Content Selection & Catalog	**43.4%**	**35.2%**	**44.4%**
Other / Unclassified	19.0%	24.2%	21.2%
General Positive Sentiment	7.7%	9.2%	8.8%
Pricing, Value & Ad-Free Experience	8.0%	6.1%	8.3%
Sound & Audio Quality	6.4%	**10.9%**	5.9%
Customization, Features & Playlists	**5.7%**	2.1%	2.3%
Familiarity, Ecosystem, & Convenience	5.4%	**7.3%**	4.5%
Invalid / Unsure / Noise	4.4%	5.0%	4.6%

WHAT DO YOU VALUE MOST ABOUT THIS PLATFORM?

Posed to account holders of each of the following platforms.

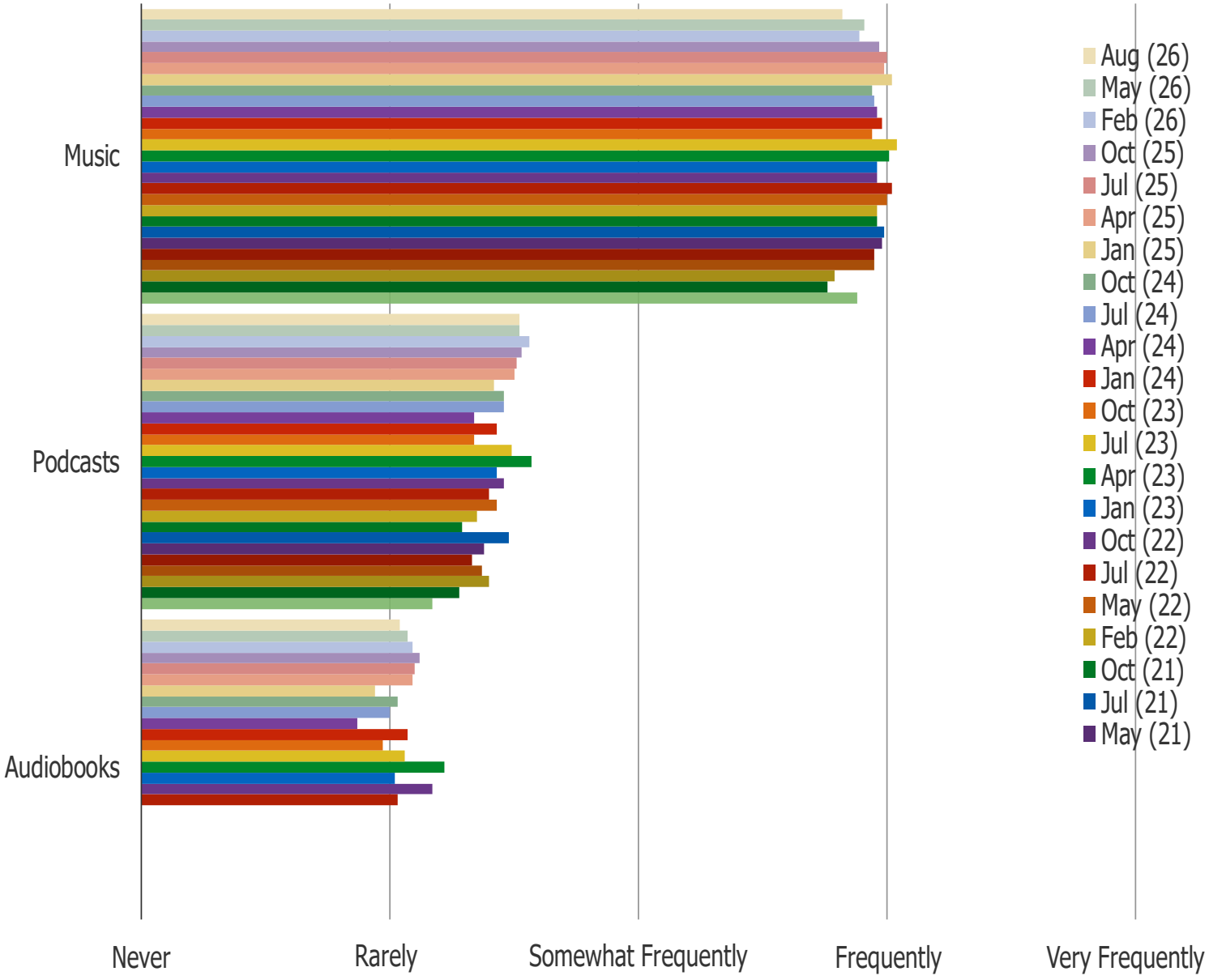
Table 2: Radio & High-Fidelity Platforms

Category	Sirius Radio	Tidal
Variety, Content Selection & Catalog	48.7%	22.6%
Other / Unclassified	19.3%	33.0%
General Positive Sentiment	8.2%	13.9%
Pricing, Value & Ad-Free Experience	6.8%	6.9%
Sound & Audio Quality	6.6%	9.0%
Familiarity, Ecosystem, & Convenience	5.6%	2.4%
Invalid / Unsure / Noise	4.0%	11.8%
Customization, Features & Playlists	0.8%	0.3%

PODCASTS

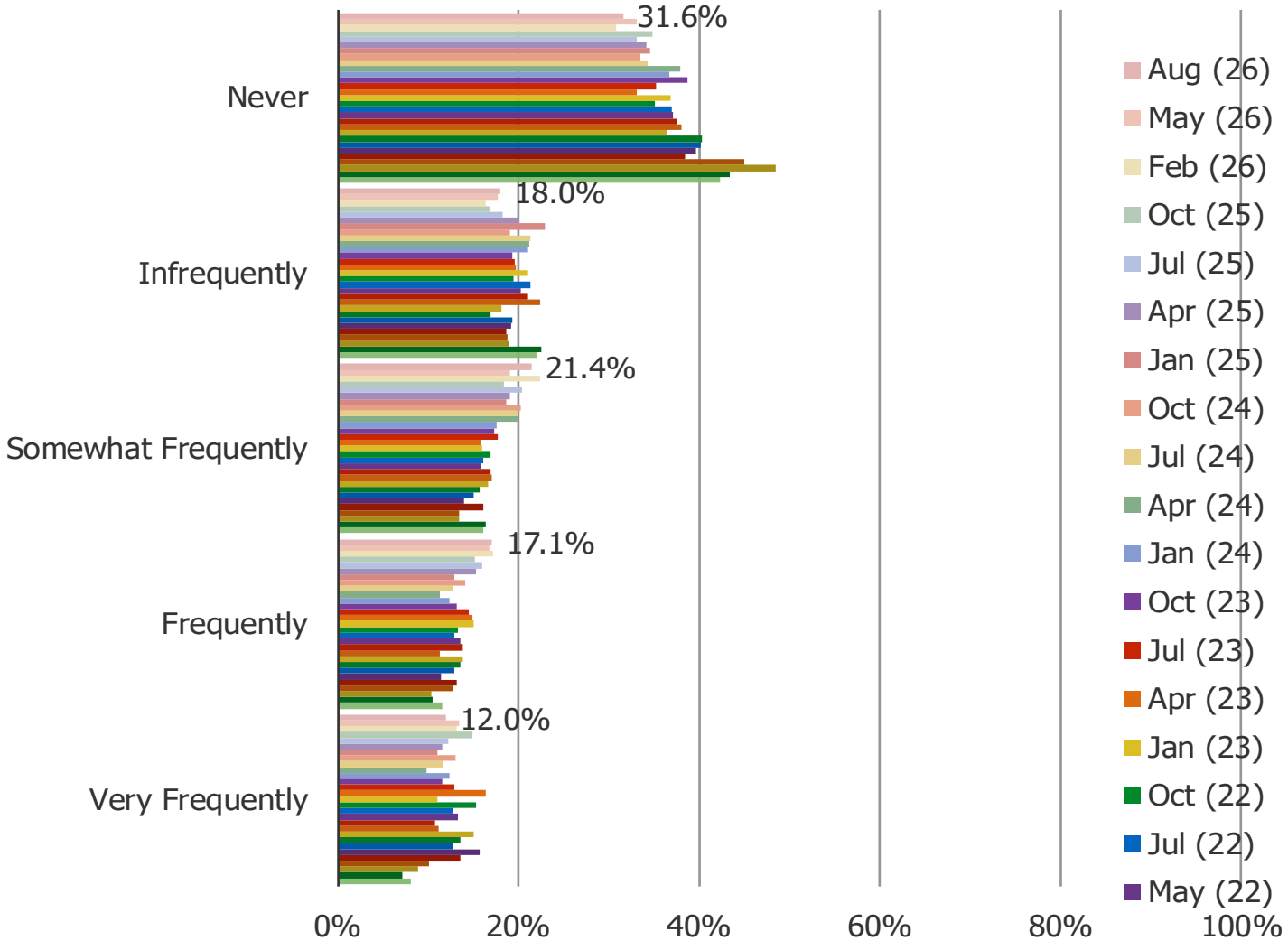
HOW OFTEN DO YOU LISTEN TO…

Posed to all respondents



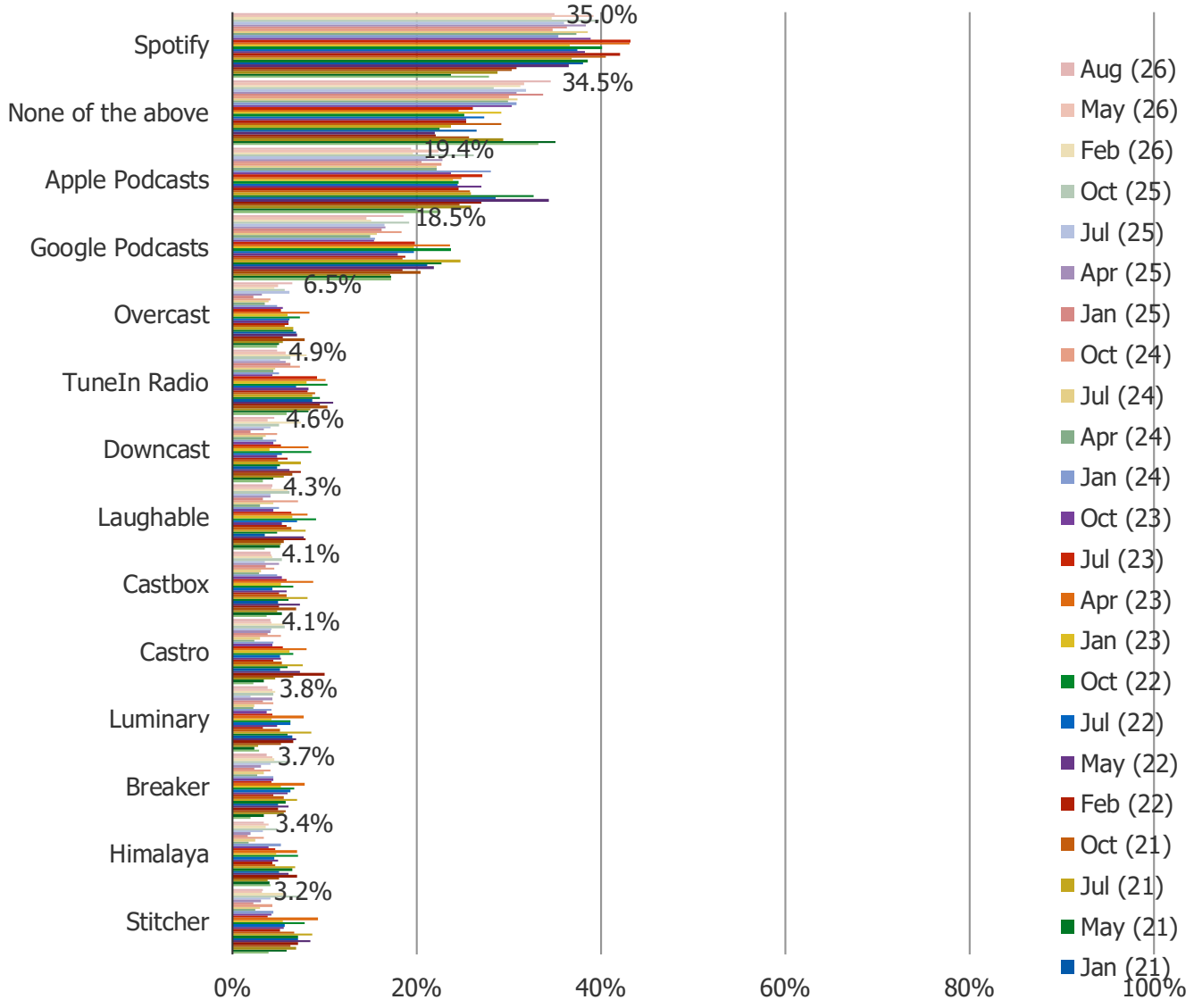
HOW OFTEN DO YOU LISTEN TO PODCASTS?

Posed to all respondents.



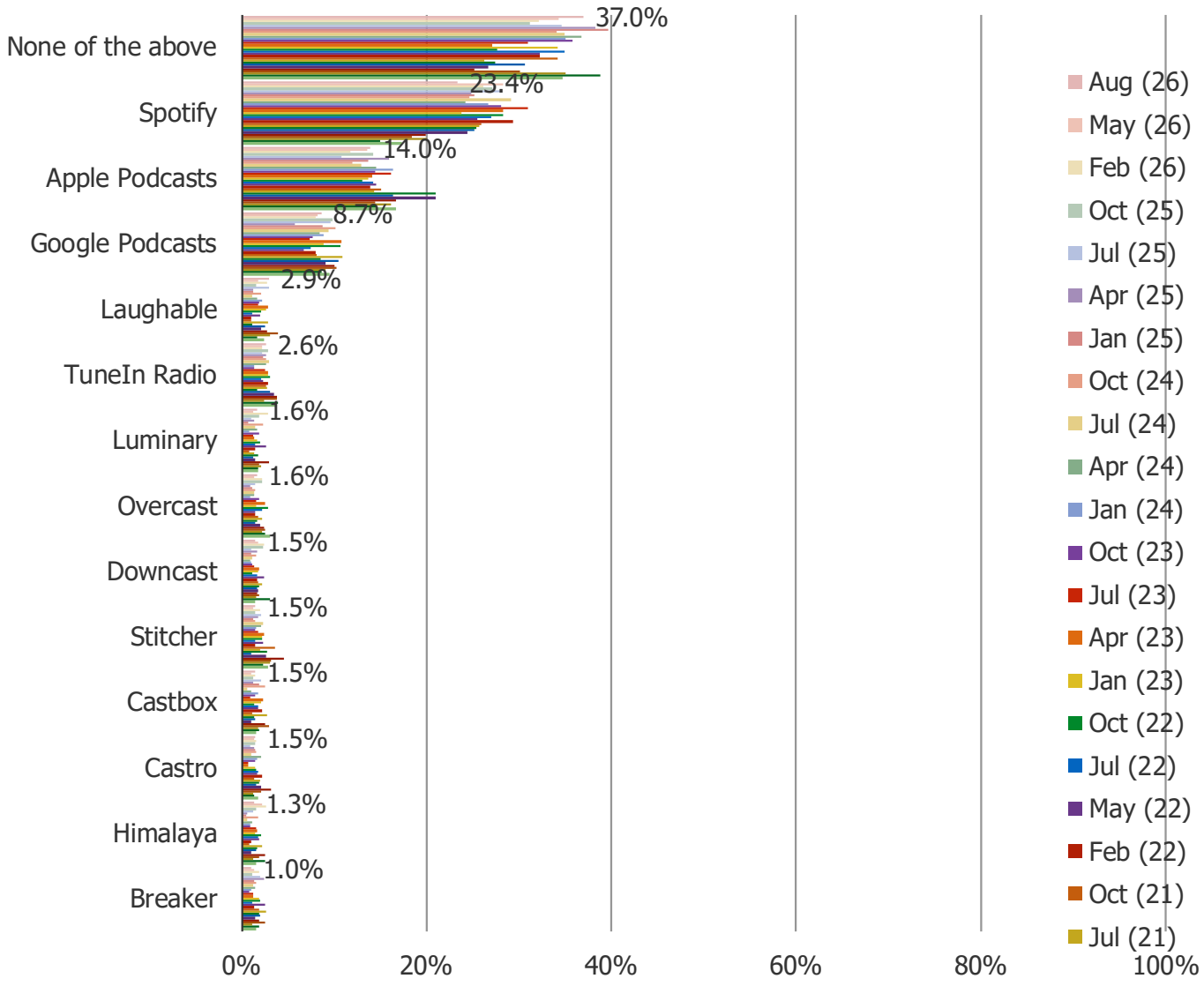
WHICH OF THE FOLLOWING PLATFORMS DO YOU USE TO LISTEN TO PODCASTS?

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?

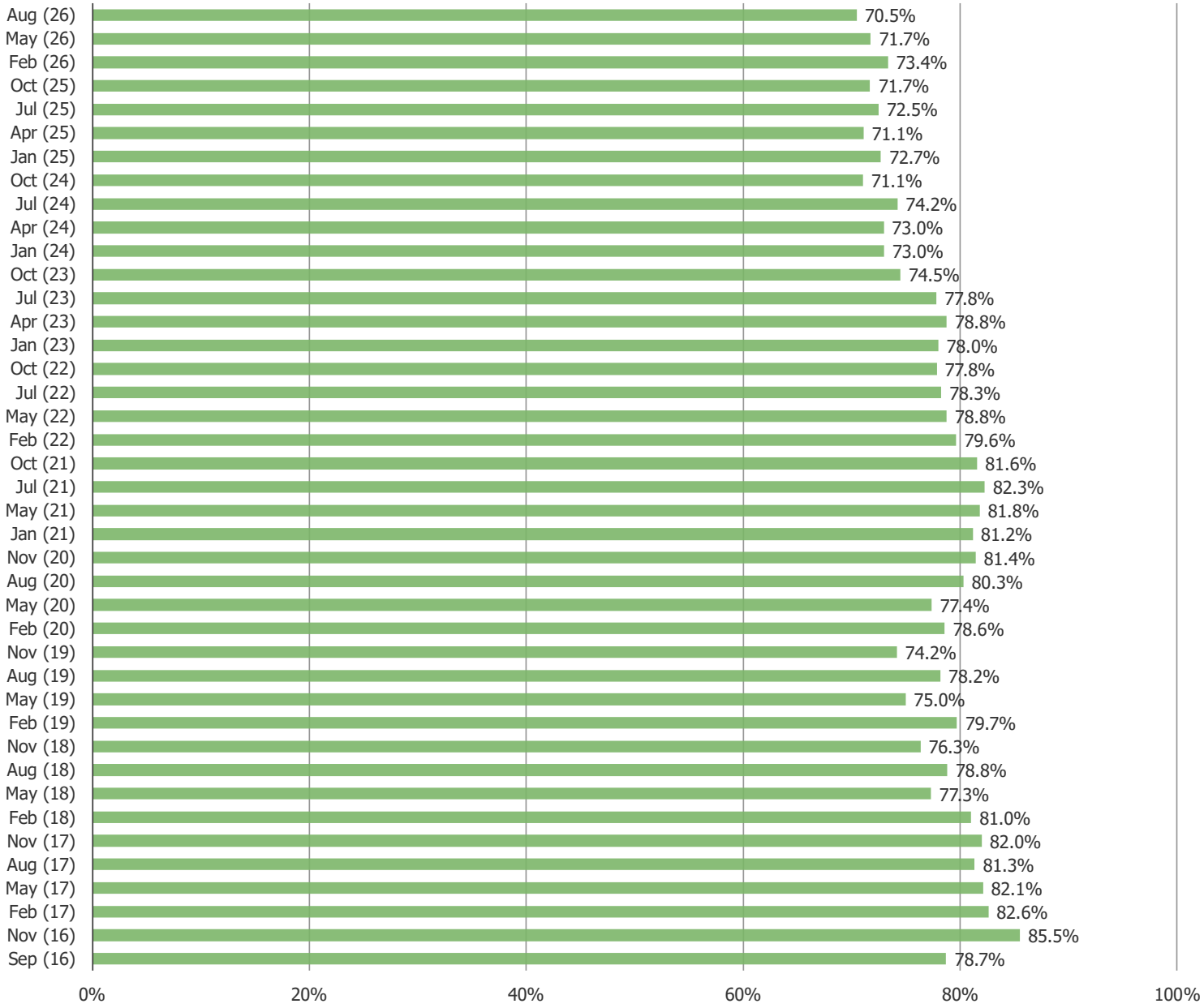
Posed to respondents who listen to podcasts (more often than never)



CONNECTED CAR

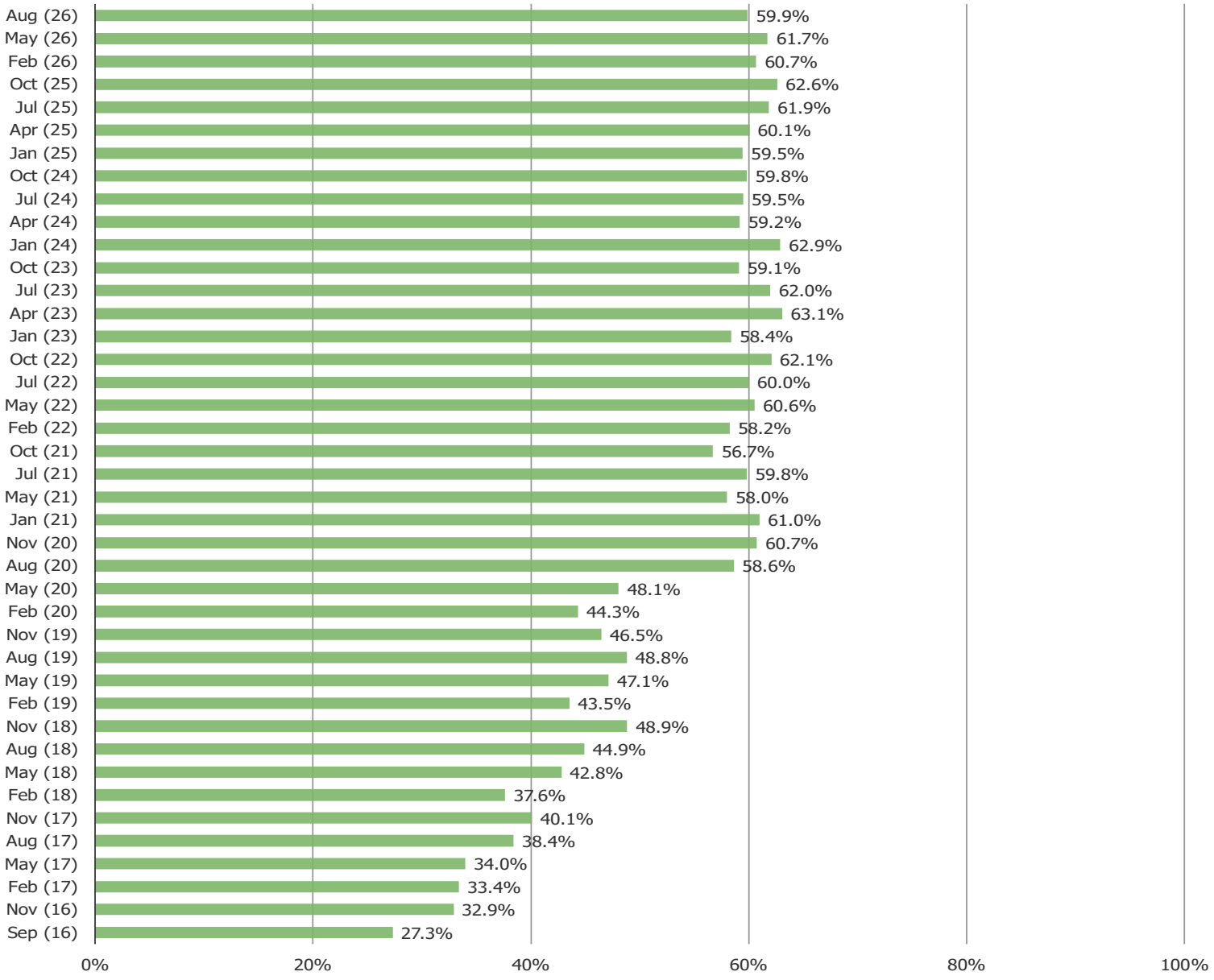
OWNS OR LEASES A CAR

Posed to all respondents



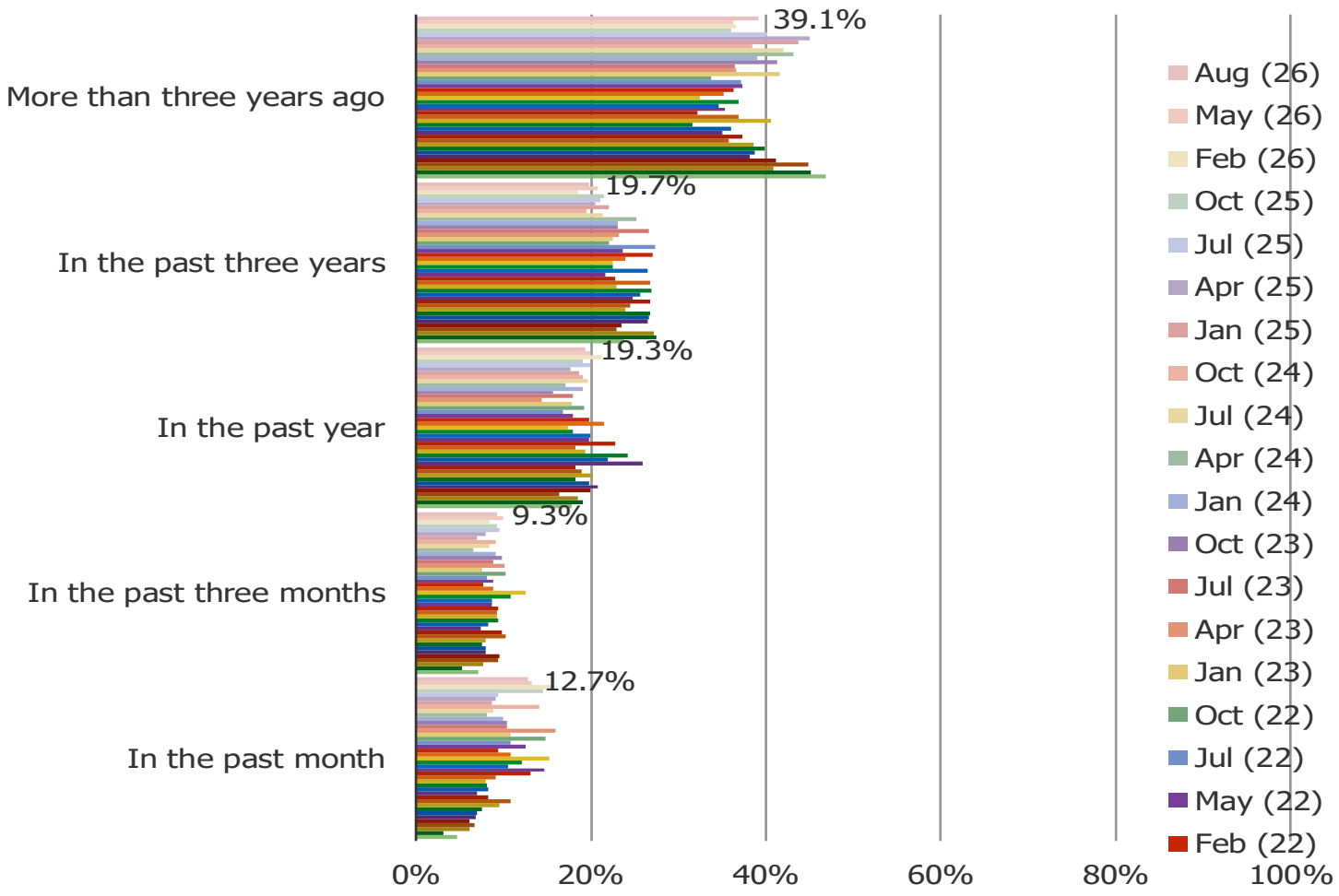
DO YOU EVER CONNECT A SMARTPHONE TO LISTEN TO MUSIC APPS IN YOUR CAR LIKE SPOTIFY, PANDORA, APPLE MUSIC, ETC?

Posed to all respondents who own / lease a car



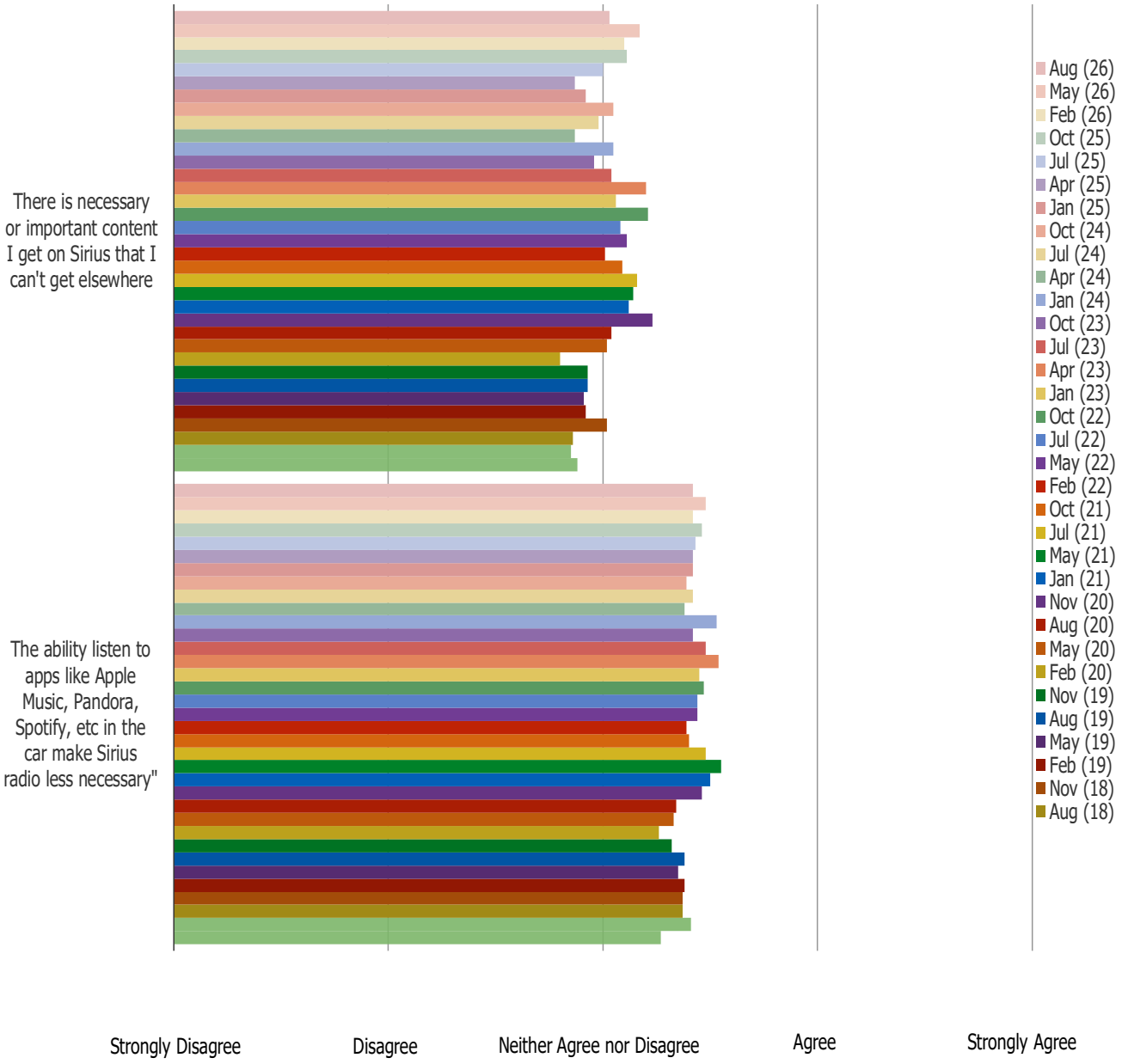
WHEN IS THE LAST TIME YOU PURCHASED OR LEASED A CAR?

Posed to all respondents who own / lease a car



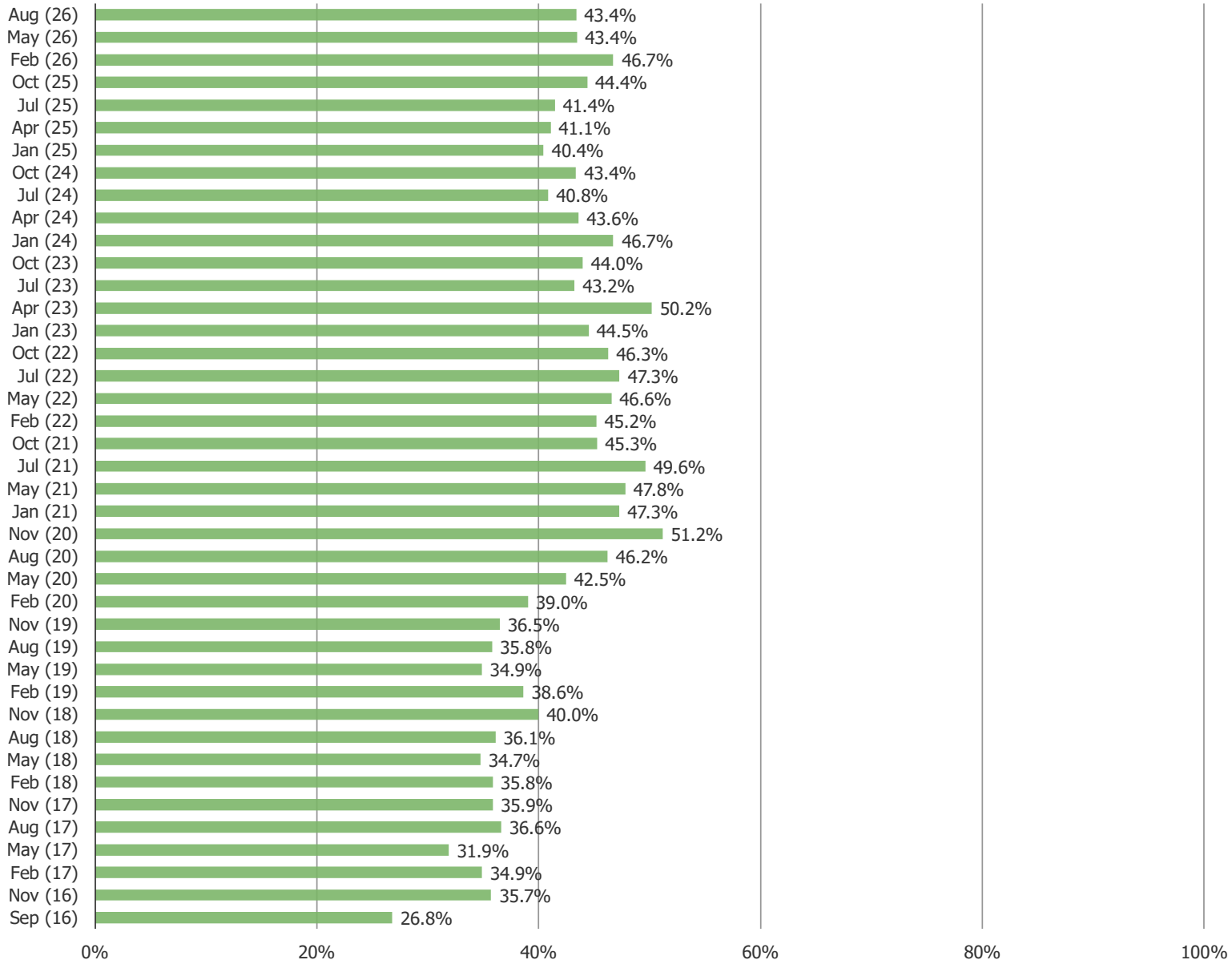
HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS:

Posed to all respondents who own / lease a car



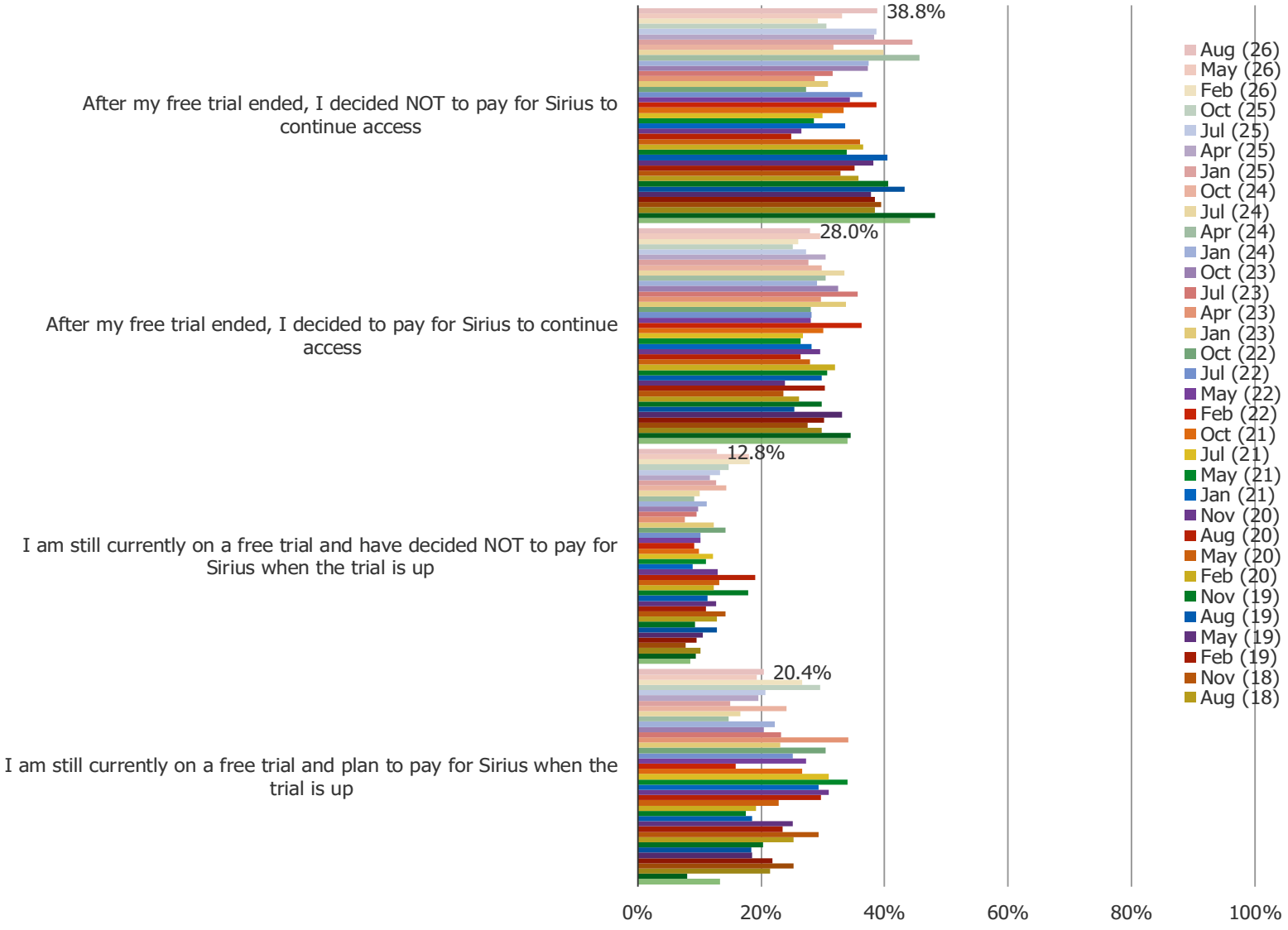
WHEN YOU MOST RECENTLY LEASED OR BOUGHT A CAR, DID IT COME WITH A FREE TRIAL TO SIRIUS RADIO?

Posed to all respondents who own / lease a car



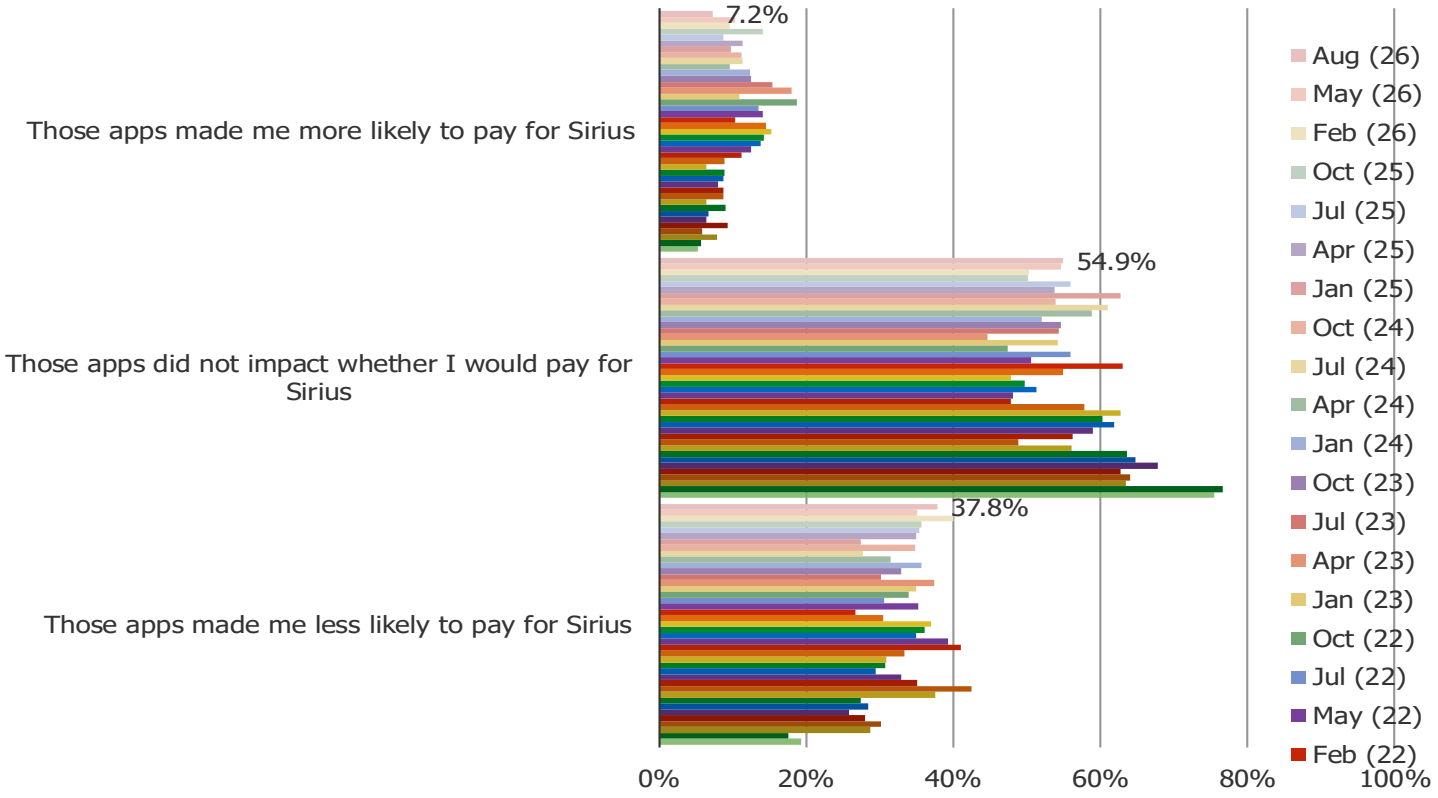
WHEN THE FREE TRIAL WAS UP, WHAT DID YOU DO?

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?

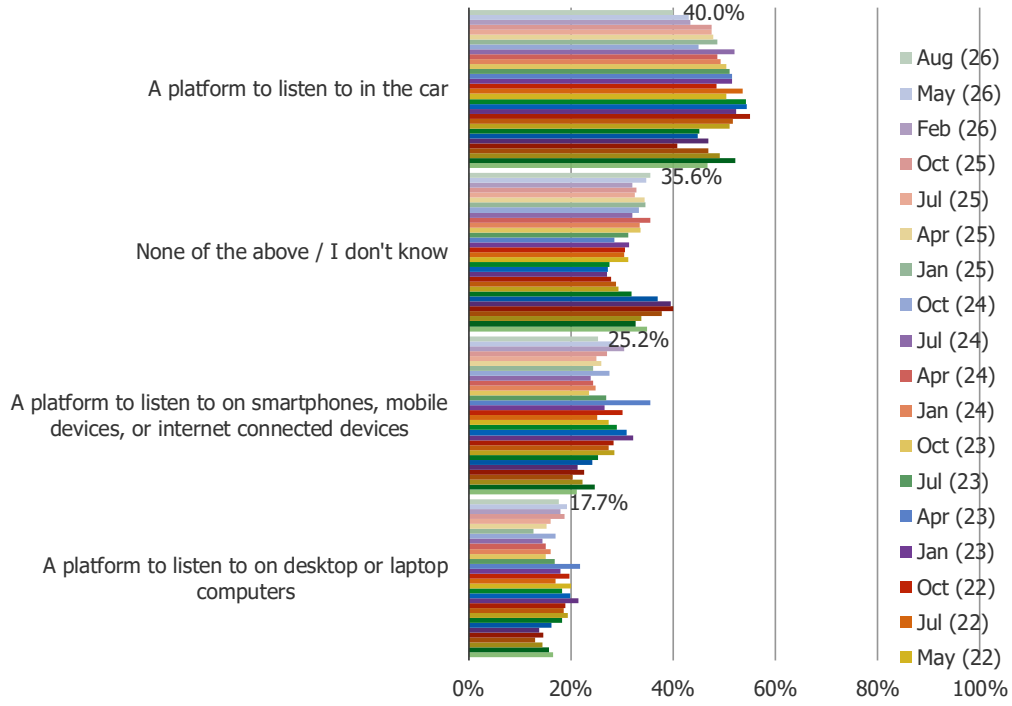
Posed to respondents who had/have a free trial when they most recently got a new car.



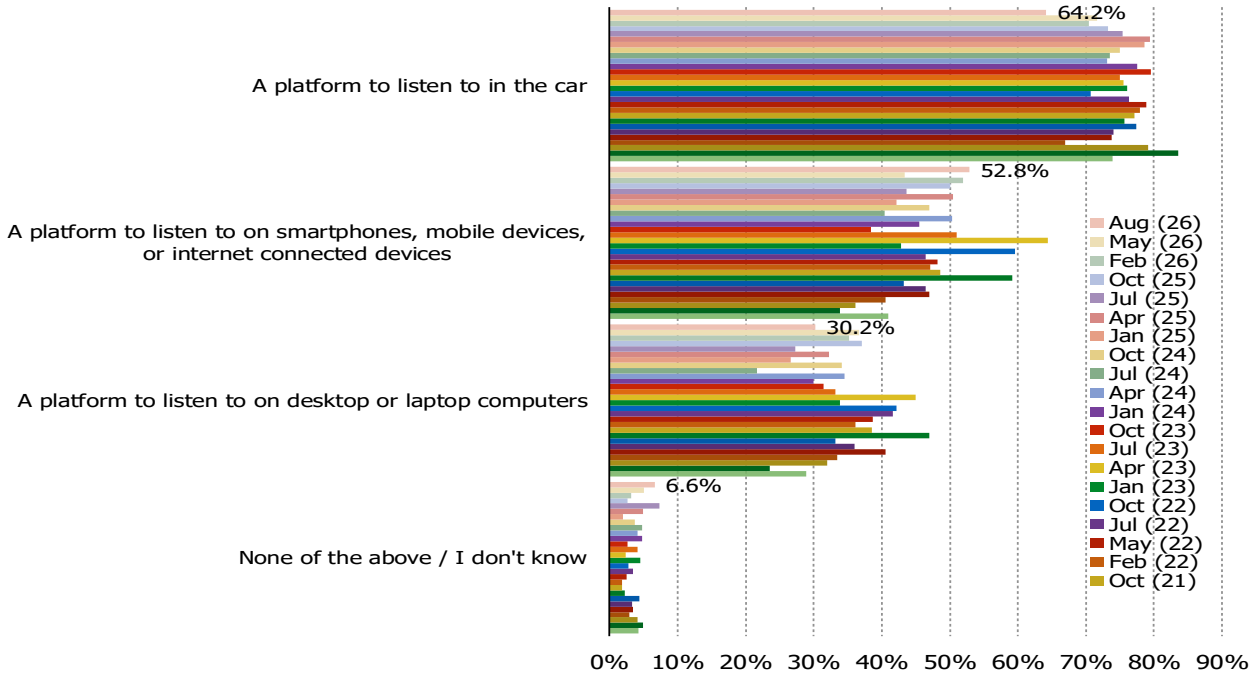
SIRIUS XM

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

Posed to all respondents.

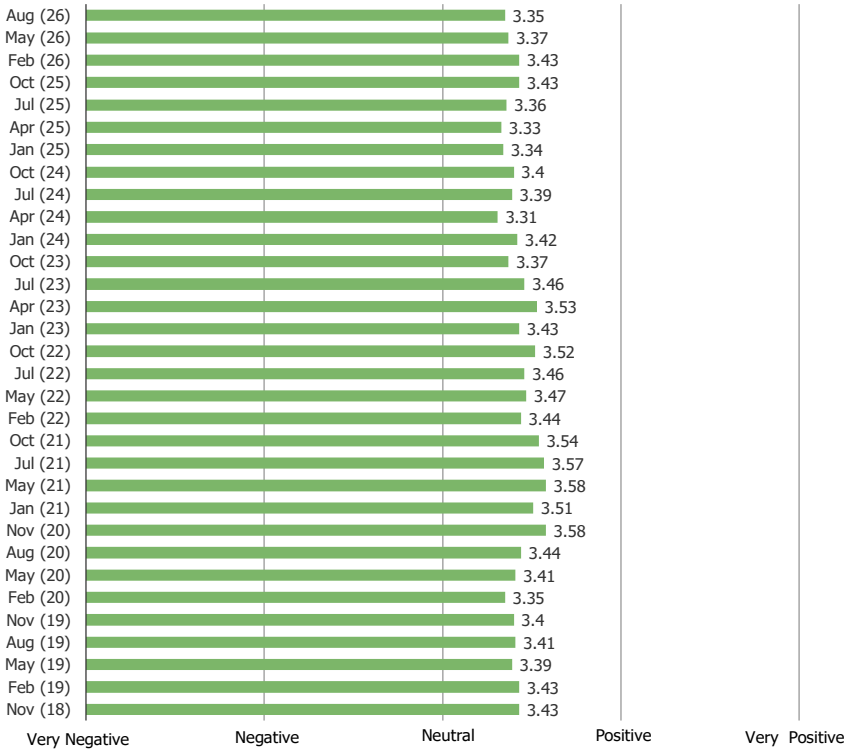


Posed to paying Sirius subscribers.

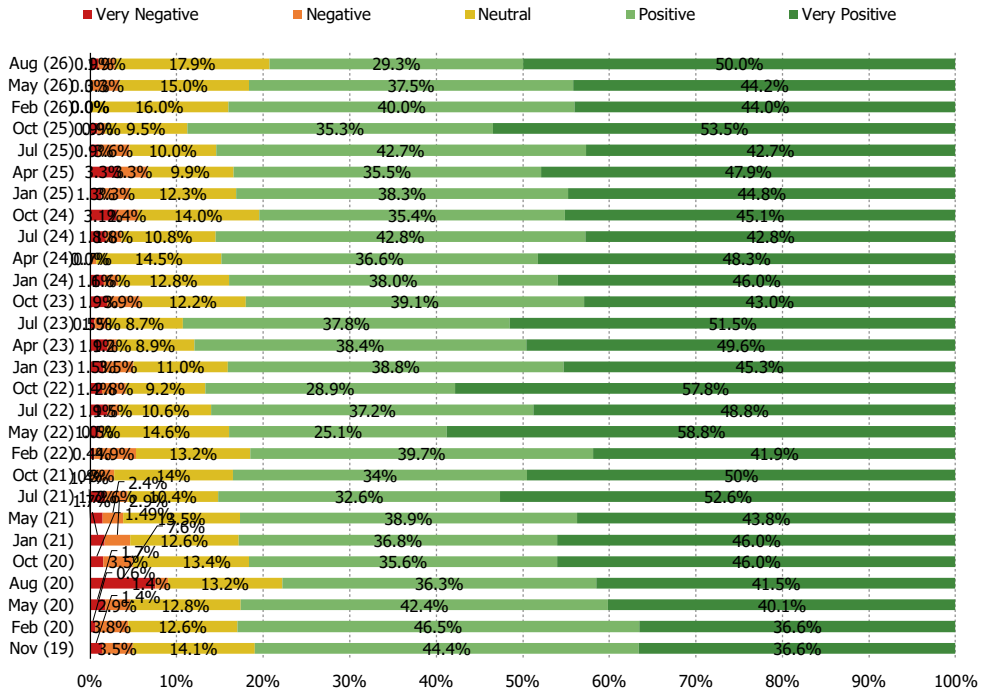


WHAT IS YOUR PERCEPTION OF SIRIUS XM?

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.

Category	% of Total Responses	Key Terms & Groupings Captured
Other / Unclassified	29.77%	Ambiguous or unique responses that could not be mapped
Pricing & Value (Too Expensive, Why pay?)	24.41%	Expensive, cost, pay, fee, "why pay for radio," overpriced
Invalid / Unsure / Noise	14.50%	"Not sure," "I don't know," "no opinion," keyboard smashes
Content Quality (Repetitive, Bad DJs)	12.02%	Same songs, repetitive, boring, Howard Stern, junk, garbage
General Negative / Disinterest	8.25%	"Don't like it," "not interested," "sucks," hate
Never Used / Don't Use	3.61%	"Never used it," "no experience," "don't listen"
Customer Service & Aggressive Marketing	2.72%	Hard to cancel, scam, spam, calls, annoying, billing
Outdated or Prefer Alternatives	1.95%	Spotify, Pandora, Bluetooth, obsolete, phone, local radio
Too Many Ads & Commercials	1.38%	Ads, commercials, advertisements
Technical Issues (Reception, Glitches)	0.93%	Signal cuts out, reception, buffering, app
Political Complaints	0.28%	Political, liberal, conservative, biased, propaganda
Distracting While Driving	0.16%	Distract, distracting, distraction

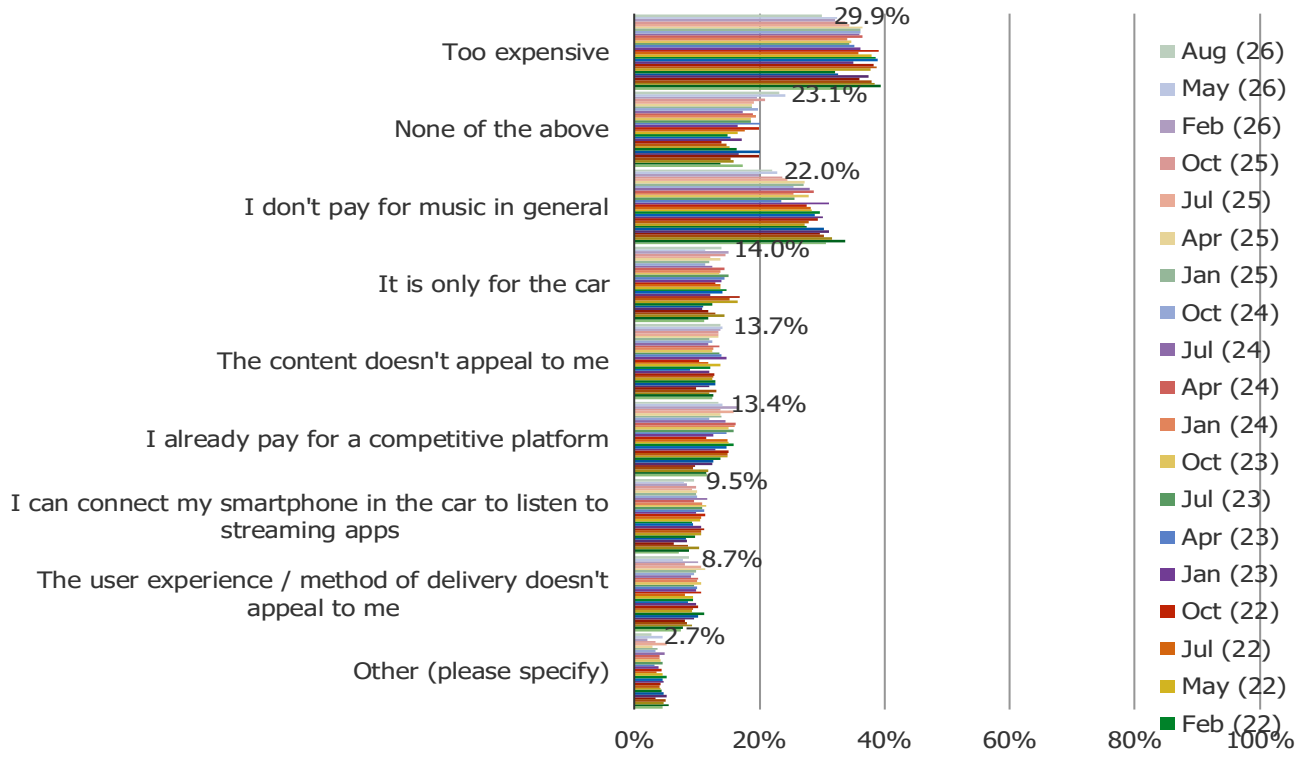
WHY IS YOUR OPINION NEGATIVE? (CONTINUED)

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

Category	Trend Direction	R^2	P-Value
Pricing & Value (Too Expensive, Why pay?)	Down	0.2108	0.0240
Distracting While Driving	Down	0.2066	0.0257
Political Complaints	Down	0.1594	0.0533
Customer Service, Cancellation & Aggressive Marketing	Down	0.0972	0.1380
Other / Unclassified	Up	0.0924	0.1488
Technical Issues (Poor Reception, App Glitches)	Down	0.0769	0.1897
Invalid / Unsure / Noise	Up	0.0671	0.2218
Never Used / Don't Use	Up	0.0631	0.2365
Outdated or Prefer Alternatives (Spotify, Phone)	Down	0.0256	0.4549
General Negative / Disinterest	Up	0.0159	0.5575
Too Many Ads & Commercials	Up	0.0019	0.8411
Content Quality (Repetitive, Bad DJs)	Down	0.0005	0.9161

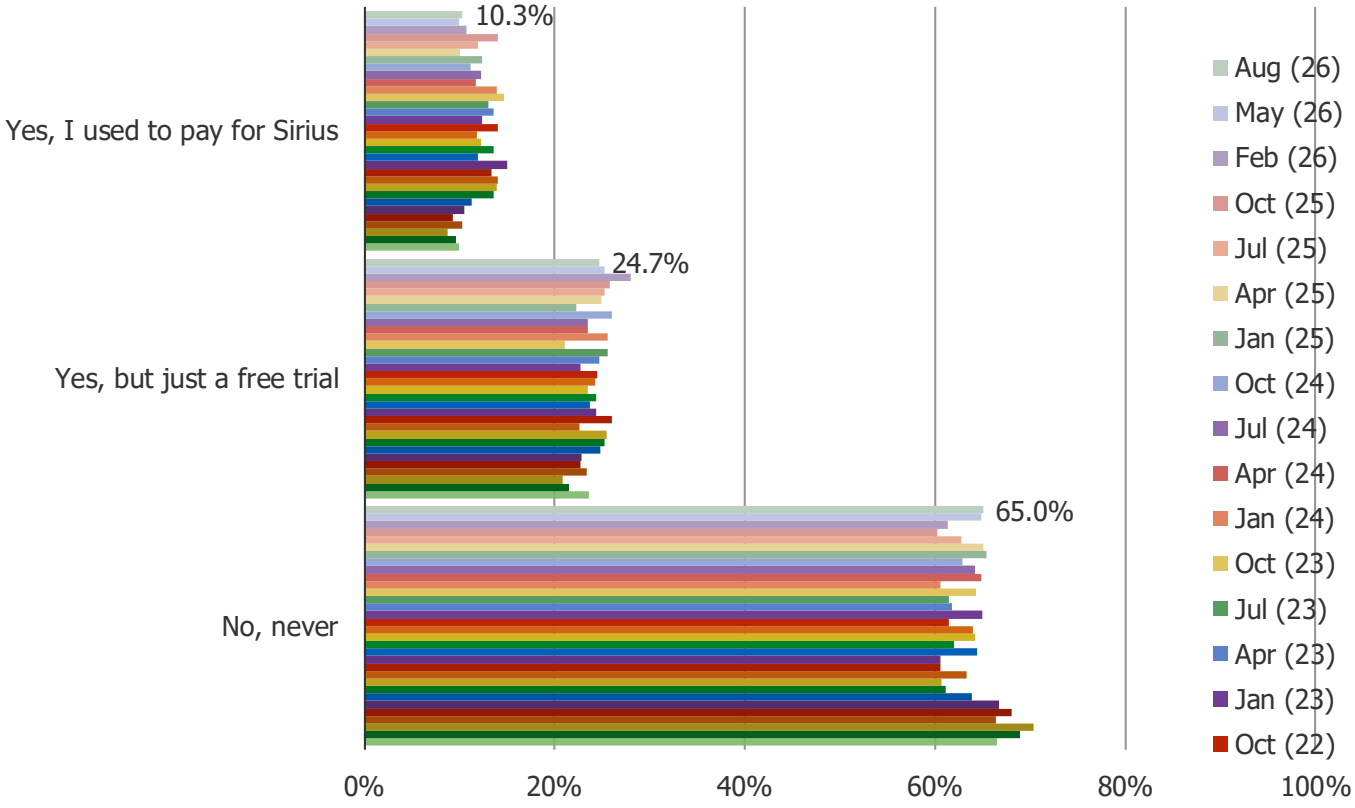
WHY ARE YOU NOT A SIRIUS XM SUBSCRIBER? (SELECT ALL THAT APPLY)

Posed to respondents who are not subscribers of Sirius XM.



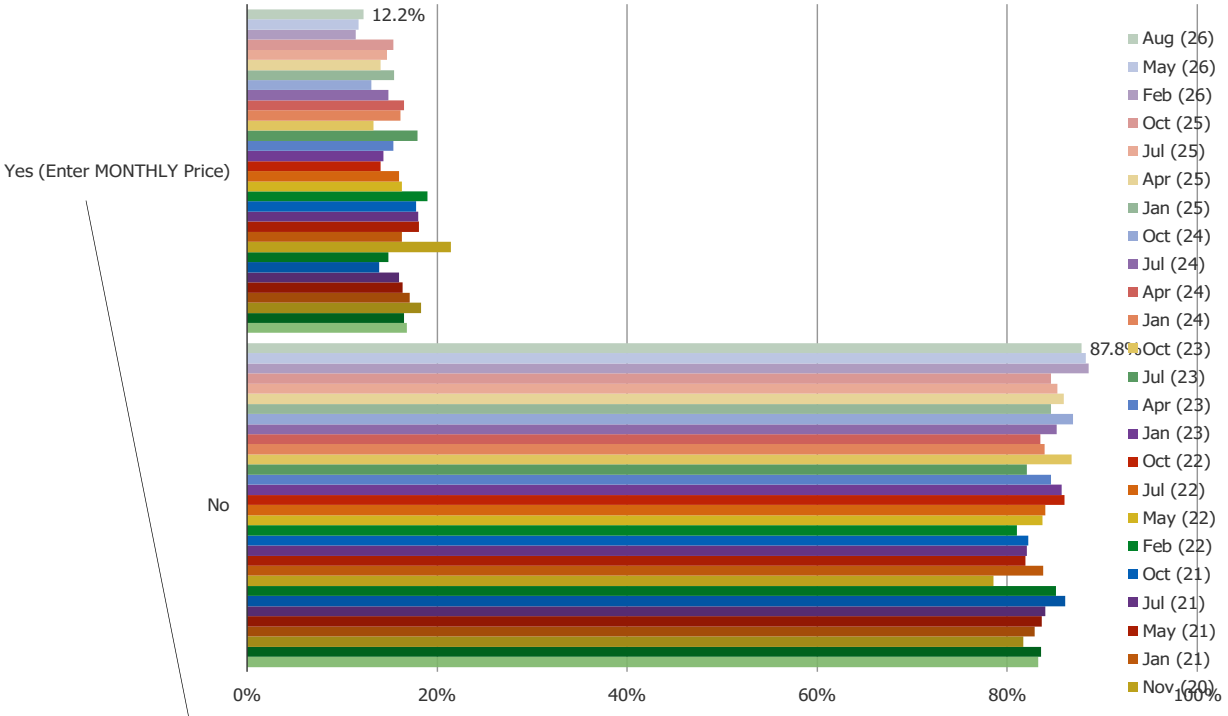
HAVE YOU EVER BEEN A SIRIUS XM SUBSCRIBER?

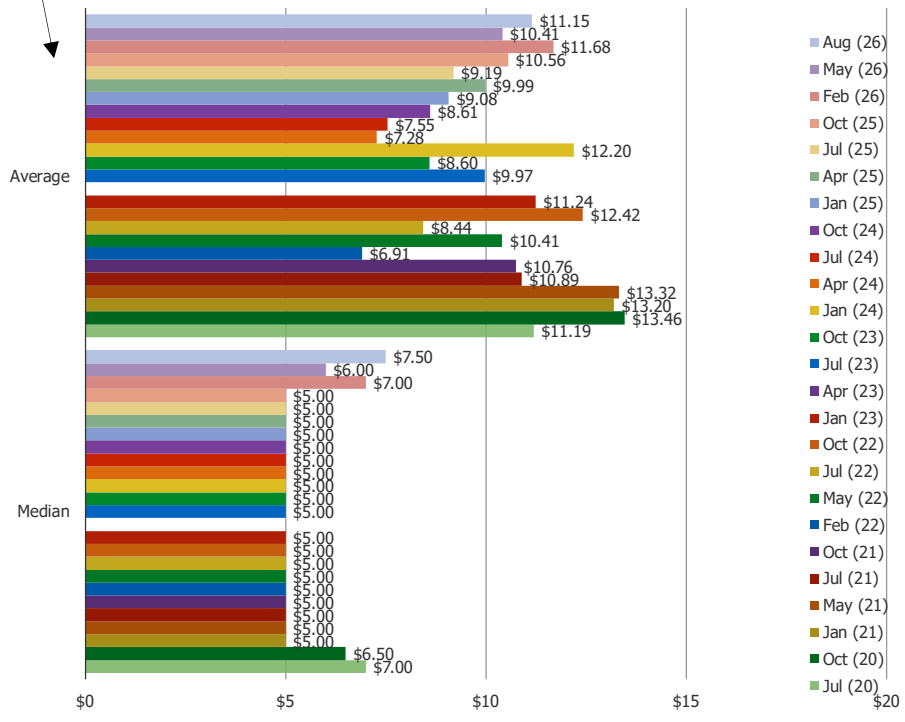
Posed to non-Sirius XM subscribers.



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

