

QINTRO1:

Thank you for taking part in the survey. We would like to ask you a few questions about technologies located within new cars, services in cars, as well as premium audio in cars. Please rest assured that all answers will be treated in the strictest of confidence and will only be used for statistical purposes. All replies will remain completely anonymous.

****SCREENER****

ASK ALL – SINGLE CHOICE

SINGLE SELECT

Q1 How many vehicle(s) does your household own?

1. None - TERMINATE
2. 1
3. 2
4. 3
5. 4 or more

The next three questions are about your NEXT vehicle.

****SCREENER****

ASK ONLY THOSE WHO OWN A VEHICLE CURRENTLY (Q1 [2-5])

SINGLE SELECT

Q2 Does your household plan to buy a vehicle sometime within the next 3 years that will be for personal use only? Please do not answer “yes” if the vehicle to be purchased will primarily be used for business.

1. Yes
2. Maybe
3. No - TERMINATE

****SCREENER****

ASK ONLY THOSE WHO MIGHT/WILL BUY VEHICLE (Q2 [1-2])

SINGLE SELECT

Q3 Which of the following best describes your role in the purchasing decision of the next household vehicle?

1. Primary Decision Maker
2. Joint Decision Maker (with spouse or partner)
3. Uninvolved in decision making process - TERMINATE

****SCREENER****

ASK ONLY THOSE WHO MAY BE INVOLVED IN PURCHASING DECISION (Q3 [1-2])

SINGLE SELECT

Q4 When thinking about your next vehicle purchase, will that vehicle be new or used?

1. New
2. Used - **TERMINATE**
3. I don't know- **TERMINATE**

**ASK ONLY NEW CAR INTENDERS (Q4 [1])
SINGLE SELECT**

Q5 What is your gender?

1. Female
2. Male
3. ~~Gender nonconforming~~

**ASK ONLY NEW CAR INTENDERS (Q4 [1])
ONLY US**

ORDER ALPHABETICALLY ANCHORING "I DO NOT RESIDE IN Canada"

Q6 In what US state do you currently reside?

1. British Columbia
2. Manitoba
3. New Brunswick
4. Newfoundland and Labrador
5. Northwest Territories
6. Nova Scotia
7. Nunavut
8. Ontario
9. Prince Edward Island
10. Quebec
11. Saskatchewan
12. Yukon Territory
13. I do not reside in Canada - **ANCHOR AT THE END AND TERMINATE IF SELECTED.**

Recode the above states into the regions provided for the quotas.

**ASK ONLY NEW CAR INTENDERS (Q4 [1])
SINGLE SELECT**

****age should also be grouped into generational groups as provided in Excel quota sheet)

Q7 What is your current age? [if under age 18, terminate]

[DROP DOWN] with values 18-99+

Recode Age

1. 18-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65-74
7. 75+

ASK ONLY NEW CAR INTENDERS (Q4 [1])

SINGLE SELECT

WILL CHANGE PER EACH COUNTRY

Q8 Please indicate your current annual household income in US dollars

1. Under \$25,000
2. \$25,000 to \$49,999
3. \$50,000 to \$74,999
4. \$75,000 to \$99,999
5. \$100,000-\$149,999
6. \$150,000-\$225,000
7. More than \$225,000
8. I prefer not to answer or I don't know

ASK ONLY NEW CAR INTENDERS (Q4 [1])

SINGLE SELECT

D1.Are you of North American Aboriginal descent (this includes the First Nations, Inuit, or Métis)?

1. Yes
2. No

ASK ONLY NEW CAR INTENDERS (Q4 [1])

SINGLE SELECT

D2.What is your racial background?

1. Not a visible minority
2. South Asian
3. Chinese
4. Black
5. Filipino
6. Latin American
7. Arab
8. Southeast Asian
9. West Asian

10. Korean
11. Japanese
12. North American Aboriginal
13. Another visible minority .i.e, specify: _____

ASK ONLY NEW CAR INTENDERS (Q4 [1])
SINGLE SELECT

D3.Which of these best describes you?

1. Married
2. Living with a partner
3. Divorced
4. Separated
5. Widowed
6. Never been married/ single

ASK ONLY NEW CAR INTENDERS (Q4 [1])
SINGLE SELECT

D4.Are you the parent or guardian of any children under 18 now living in your household?

1. Yes
2. No

ASK ONLY NEW CAR INTENDERS (Q4 [1])
SINGLE SELECT

D5.Do you own or rent your home?

1. Own
2. Rent
3. Other arrangement

ASK ONLY NEW CAR INTENDERS (Q4 [1])
SINGLE SELECT

D6.Which of the following best describes the area you live in?

1. Urban
2. Suburban
3. Rural

ASK ONLY NEW CAR INTENDERS (Q4 [1])
MULTI SELECT

D7. What is your current employment status?

1. Work full-time [CAN NOT BE SELECTED WITH 2, 3, 4, 5]

2. Work part-time [CAN NOT BE SELECTED WITH 1, 3, 4, 5]
3. Self-employed [CAN NOT BE SELECTED WITH 1,2, 4, 5]
4. Unemployed, Unable to work [CAN NOT BE SELECTED WITH 1,2, 3, 5]
5. Retired [CAN NOT BE SELECTED WITH 1,2, 3, 4]
6. Student [CAN BE SELECTED WITH 1,2, 3, 4, 5]
7. I prefer not to answer [EXCLUSIVE]

ASK ONLY EMPLOYED (D7 [1-3])
SINGLE SELECT

D8. Do you work from home?

1. Yes
2. No

ASK ONLY WORK FROM HOME (D8 [1])
SINGLE SELECT

D9. How often do you work from home?

1. Always
2. Most of the time
3. About half the time
4. Sometimes
5. Never

ASK ONLY NEW CAR INTENDERS (Q4 [1])
WRITE IN

Q10 What is the make and year of the most recently purchased vehicle in your household?

1. Year [DROP DOWN] with values 1999-2018
2. Make [DROP DOWN] – (makes in the attached excel, per region) Add Genesis (Hyundai)
3. I don't know/not provided [EXCLUSIVE]

The next sets of questions are about your NEXT new vehicle.

ASK ONLY NEW CAR INTENDERS (Q4 [1])
WILL CHANGE PER EACH MARKET

Q11 How much are you willing to spend on your next new vehicle?

1. Less than \$15,000
2. \$15,000 - \$20,000
3. \$20,001 - \$25,000
4. \$25,001 - \$30,000
5. \$30,001 - \$40,000
6. \$40,001 - \$50,000
7. More than \$50,000

ASK ONLY NEW CAR INTENDERS (Q1)

CHOOSE UP TO 3

Q12A What vehicle category are you most likely to purchase when selecting your next vehicle?

1. Sedan
2. Coupe
3. CUV (Crossover Utility Vehicle)
4. SUV (Sport Utility Vehicle)
5. Hatchback
6. Station Wagon
7. Cargo Van
8. Minivan
9. Pickup Truck

Q12B What type of vehicle are you most likely to purchase when selecting your next vehicle?

1. Green car/Electric/Hybrid
2. Sport/Performance
3. Luxury
4. Economy
5. Family

ASK ONLY NEW CAR INTENDERS (Q4 [1])

RANK TOP 3

****Program as drag and drop****

MAY CHANGE PER EACH MARKET

Q13 What are the top 3 makes you are considering when purchasing your next vehicle?

1. Acura
2. Alfa Romeo
3. Aston Martin
4. Audi
5. Bentley
6. BMW
7. Buick
8. Cadillac
9. Chevrolet
10. Chrysler
11. Dodge
12. Ferrari
13. Fiat

14. Ford
15. Genesis (Hyundai)
16. GMC
17. Honda
18. Hyundai
19. Infiniti
20. Jaguar
21. Jeep
22. Kia
23. Lamborghini
24. Land Rover
25. Lexus
26. Lincoln
37. Lotus
28. Maserati
29. Mazda
30. McLaren
31. Mercedes-Benz
32. MINI
33. Mitsubishi
34. Nissan
35. Porsche
36. RAM Trucks
37. Rolls-Royce
38. Scion
39. Smart
40. Subaru
41. Tesla
42. Toyota
43. Volkswagen
44. Volvo
45. Other
46. Don't know

ASK ONLY NEW CAR INTENDERS (Q4 [1])
SELECT ONE ATTRIBUTE PER STATEMENT
ROTATE/RANDOMIZE 1-31

Q14 Which of the following products/features do you consider most desirable when considering the purchase of your next vehicle?
[ROTATE/RANDOMIZE 1-21]

	Very desirable [5]	Somewhat desirable [4]	Neither desirable or undesirable [3]	Somewhat undesirable [2]	Very undesirable [1]
1. Bluetooth (e.g., hands-free voice calling)					
2. CD player					
3. Navigation system (e.g. factory installed GPS, turn-by-turn)					
4. Heated seats					
5. Branded audio system (i.e., premium audio system)					
6. Audio/sound management technologies (e.g., Active Noise Cancellation, Sound Staging Technology, Surround Sound, Signal Processing etc.)					
7. Rear seat entertainment (e.g., factory installed screens for rear seat passengers to watch)					

movies, TV, play videogames, etc.)					
8.					
9. Steering wheel mounted controls (e.g., for radio, phone, etc.)					
10. Sunroof/Moon roof					
11.					
12. Automatic climate control					
13.					
14. Internet streaming radio in the car (e.g., Spotify, etc)					
15. Infotainment system (e.g. display audio system/ informational screen in center console display)					
16.					
17. HUD (heads-up display, displays information like speed, direction, etc., on windshield in driver's line of sight)					

18.					
19.					
20.					
21.					
22.					
23.					
24.					
25.					
26.					
27.					
28.					
29.					
30.					
31.					

ASK ONLY NEW CAR INTENDERS WHO ANSWERED Q14 WITH ANSWERS OF SOMEWHAT DESIRABLE AND VERY DESIRABLE)

SELECT ONE ATTRIBUTE PER STATEMENT
 ROTATE/RANDOMIZE 1-31

Q15 Of the products/features you marked as somewhat- or very-desirable, please place those features into categories as noted below.

	Cost should be built into the base price of the vehicle/Not willing to pay extra (A)	Don't know (B)	Willing to pay extra (C)	
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Same question attributes as Q14 selected somewhat or very desirable

ASK ONLY THOSE WHO ANSWERED Q15 [C]
ANSWER FOR EACH ATTRIBUTE Q15-C
WILL CHANGE PER EACH MARKET

Q17 How much extra would you be willing to pay for ****insert attribute from Q15 (C)****?

1. \$1-\$100
2. \$101-\$200
3. \$201-\$300
4. \$301-\$400
5. \$401-\$500
6. \$501-600
7. \$601-\$700
8. \$701-\$800
9. \$801-\$900
10. \$901-\$1000
11. \$1001-\$1500
12. \$1501-\$2000
13. \$2001-\$2500
14. \$2501+

ASK ONLY NEW CAR INTENDERS (Q4 [1])
SINGLE SELECT

Q18 Do you currently own a smartphone?

1. Yes
2. No

ASK ONLY SMARTPHONE OWNERS (Q18 [1])
SINGLE SELECT
ROTATE/RANDOMIZE 1-11
LIST CHANGES PER EACH MARKET

Q19 What is the brand of the smartphone you own and use most often?

1. Apple
2. Blackberry
3. HTC
4. LG
5. Motorola
6. Nokia
7. Samsung
8. Microsoft
9. Google
10. Sony
11. Other [WRITE IN]

ASK ONLY SMARTPHONE OWNERS (Q18 [1])

IF Q19 [1] AUTOMATICALLY SELECT Q20 [1] AND MOVE RESPONDENT TO Q21

IF Q19 [2] AUTOMATICALLY SELECT Q20 [4] AND MOVE RESPONDENT TO Q21

IF Q19 [3-9] DISPLAY Q21 ATTRIBUTES [2,3,5 AND ONLY]

Q20 Which operating system (OS) is on this smartphone?

1. iOS
2. Android
3. Windows
4. Blackberry OS
5. I don't know

ASK ONLY SMARTPHONE OWNERS (Q18 [1])

SINGLE SELECT

ROTATE/RANDOMIZE 1-8

LIST CHANGES PER EACH MARKET

Q20_1 Which mobile carrier are you utilizing?

1. Bell (includes MTS and Virgin Mobile)
2. Freedom Mobile
3. Videotron
4. SaskTel
5. TNW Wireless
6. Telus (Includes Koodo and Public Mobile)
7. Rogers (includes Fido and Chatr)
8. Other (specify)

ASK ONLY SMARTPHONE OWNERS (Q18 [1])
SINGLE SELECT

Q21 What kind of data plan do you have?

1. I don't have a data plan
2. Less than 1GB
3. 1-5 GB
4. 6-10 GBs
5. 11 -20 GBs
6. 21+ GBs
7. Unlimited Data
8. I don't know

ASK ONLY THOSE ANSWERED (Q21 [2-7])
SINGLE SELECT

Q22 Is this data plan shared with anyone else?

1. No, this data plan is only for me
2. Yes, this data plan is shared (e.g., family plan)

ASK ONLY NEW CAR INTENDERS (Q4 [1])
SINGLE SELECT

Q26 Does your current vehicle have a built-in display audio, and or “infotainment” system, and or navigation system (a screen in the center part of the vehicle to show various functions of the vehicle like audio, air, navigation, etc.)?

example



1. Yes
2. No
3. Not sure

The next questions are about audio in the car...

ASK ONLY NEW CAR INTENDERS (Q4 [1])

SELECT UP TO FOUR ATTRIBUTES

LIST WILL CHANGE PER MARKET

Q33 What are the top 4 audio sources that you use in your current vehicle?

1. AM/FM Radio
2. HD Radio
3. Satellite Radio
4. Stored on mobile device (phone, iPod, USB, etc.)
5. Internet/Streaming (such as Spotify)
6. CD/DVD Player
7. Stored on in-vehicle hard drive
8. I don't listen to audio in my vehicle [ANCHOR, EXCLUSIVE]

ASK THOSE WHO ANSWERED Q33 [1-7]

ANSWER FOR EACH SELECTED ATTRIBUTE IN Q33

DRAG AND DROP QUESTION

Q34 How often do you listen to <INSERT choices from Q33 here> in your vehicle?

1. Always (i.e., whenever I drive) [CAN ONLY ANSWER ONCE FOR ON ATTRIBUTE]
2. Frequently (e.g., 3-5 times a week) [CAN PLACE MULTIPLE ATTRIBUTE]
3. Occasionally (e.g., a few times a month) [CAN PLACE MULTIPLE ATTRIBUTES]

ASK ONLY NEW CAR INTENDERS (Q4 [1])

ROTATE/RANDOMIZE 1-4

MULTIPLE SELECT

Q35 What type of audio connection device do you use in the car? Select all that apply.

1. Bluetooth
2. 3.5mm jack
3. USB cable
4. iPod cable
5. Other (please specify) [ANCHOR] [WRITE IN]
6. None [ANCHOR] [EXCLUSIVE]

ASK ONLY THOSE WHO SELECT INTERNET RADIO AS ONE OF THEIR OPTIONS (Q33 [5])

SINGLE SELECT

Q36 Do you subscribe to a premium streaming radio or on-demand streaming service (e.g., Spotify, Xbox Music, Beats Music, Google Play Music, etc) for which you have a paid subscription, or do you have a free version?

1. I have a free version
2. I subscribe to a paid version
3. Not sure

ASK ONLY MUSIC SUBSCRIBERS (Q36 [1-2])

SINGLE SELECT

ROTATE/RANDOMIZE 1-21

LIST WILL CHANGE PER EACH MARKET

Q37 Which internet radio/audio app do you use most often?

1. TIDAL
2. Spotify
- ~~3.—~~
- ~~4.—~~
5. Apple Music
6. Google Play Music
7. Deezer
- ~~8.—~~
- ~~9.—~~
10. Napster
11. iHeartRadio
12. TuneIn Radio
13. SoundCloud
14. Microsoft Groove Music (previously Xbox Music and Zune Music)
15. Slacker Radio
- ~~16. Songza~~
17. Aha Radio
- ~~18.—~~
- ~~19.—~~
20. Kindle
21. Audible
22. PlayStation Music
23. Other _____ [ANCHOR]

ASK ONLY NEW CAR INTENDERS (Q4 [1])

SINGLE SELECT PER ATTRIBUTE

ROTATE/RANDOMIZE 1-8

Q44 Please rate each audio source based on audio quality/fidelity? With "very good" meaning the best in audio quality and "very bad" meaning the worst.

	Very Good (A)	Good (B)	Fair (C)	Poor (D)	Bad (E)	Very Bad (F)	Don't know [EXCLUSIVE]
1. HD Radio							
2. Satellite radio							
3. CD Player							
4. Bluetooth audio streaming							
5. Internet radio							
6. AM radio							
7. FM radio							
8. Smartphone/MP3 player connectivity							

ASK ONLY NEW CAR INTENDERS (Q4 [1])
 SELECT ONE ATTRIBUTE PER STATEMENT
 ROTATE/RANDOMIZE 1-15

Q45 How important to you are these premium car audio system features?

	Extremely Important (A)	Very Important (B)	Neither important nor unimportant (C)	Very Unimportant (D)	Not at all Important (E)
1. Brand					
2. Design (craftsmanship/material)					
3. Digital Signal Processing (DSP)					
4. High number of speakers					
5. Premium Sound Quality					
6. Sub-woofer					
7. Surround sound (e.g. DTS, Dolby, THX Certified)					
8. High volume level					
9. Active noise cancellation (ANC)					
10. Amplifier					
11. 360-degree sound field/3D sound					
12. High number of sound channels					
13. High wattage					
14. Tweeter					
15. Digital Audio Restoration Technology (e.g. Harman's Clari-Fi)					

Q46 Of the features you marked as very or extremely-important, please place those features into categories as noted below.

	Should be standard equipment/not willing to pay extra (A)	Don't know (B)	Willing to pay extra (C)	
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Same question attributes as q45 who selected extremely or very important.

ASK ONLY NEW CAR INTENDERS (Q4 [1])

MULTIPLE SELECTROTATE/RANDOMIZE 1-40, and 42

Q47. Which of these brands do you recognize?

1. Alpine
2. Arkamys
3. Beats Audio
4. Bang & Olufsen
5. Blaupunkt
6. Bose
7. Boston Acoustics
8. Bowers & Wilkins
9. Burmester
10. Canton
11. Clarion
12. Denon
13. Dimension
14. Dolby
15. DTS
16. Dynaudio
17. ELS Surround
18. Fender
19. Harman-Kardon
20. Infinity
21. Interscope
22. JBL
23. Kenwood
24. Kicker
25. Krell

- 26. Lear/Philips
- 27. Lexicon
- 28. Mark Levinson
- 29. Meridian
- 30. Naim
- 31. Panaray
- 32. Panasonic
- 33. Pioneer
- 34. Philips
- 35. Revel
- 36. Rockford Fosgate
- 37. Shaker
- 38. Sony
- 39. THX Certified
- 40. XBM
- 42. AKG
- 41. None of these [ANCHOR/EXCLUSIVE]

SHOW ONLY BRANDS SELECTED IN Q47

Q48. Where do you recognize these brands from?

Columns:

- 1. Car Audio
- 2. Home Audio
- 3. Other Audio

Rows - SHOW ONLY BRANDS SELECTED IN Q47
MULTIPLE SELECTROTATE/RANDOMIZE 1-40,42

ASK ONLY NEW CAR INTENDERS (Q4 [1])
SINGLE SELECT

Q49 Would you prefer to have a brand name car audio system?

- 1. Yes
- 2. No Preference
- 3. No

THOSE WHO ANSWERED YES OR NO PREFERENCE IN Q49 [1-2]

SINGLE SELECT

Q50 How much influence would having a brand name audio system effect your decision when buying a car?

1. Extremely influential
2. Very influential
3. Somewhat influential
4. Slightly influential
5. Not at all influential

THOSE WHO ANSWERED EXTREMELY INFLUENTIAL THROUGH SLIGHTLY Q50 [1-4]

SINGLE SELECT

ROTATE/RANDOMIZE 1-40,42

Q51 Which brand would be most influential during your decision of buying a new car?

1. Alpine	
2. Arkamys	
3. Beats Audio	
4. Bang & Olufsen	
5. Blaupunkt	
6. Bose	
7. Boston Acoustics	
8. Bowers & Wilkins	
9. Burmester	
10. Canton	
11. Clarion	
12. Denon	
13. Dimension	
14. Dolby	
15. DTS	
16. Dynaudio	
17. ELS Surround	
18. Fender	
19. Harman-Kardon	
20. Infinity	
21. Interscope	
22. JBL	
23. Kenwood	
24. Kicker	

25. Krell 26. Lear/Philips 27. Lexicon 28. Mark Levinson 29. Meridian 30. Naim 31. Panaray 32. Panasonic 33. Pioneer 34. Philips 35. Revel 36. Rockford Fosgate 37. Shaker 38. Sony 39. THX Certified 40. XBM 42. AKG 41. None of these [ANCHOR/EXCLUSIVE]	
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ASK ONLY THOSE WHO ANSWERED Q51

SINGLE SELECT

ROTATE/RANDOMIZE 1-7

Q52 Why did you chooseinsert brand name Q51 here**?**

1. Brand has a good reputation
2. Design
3. Good quality/sound
4. Heard good reviews
5. Price
6. Recommendation/word of mouth
7. Use their products elsewhere as well

ASK ONLY THOSE WHO ANSWERED Q51 (1-40,42)

Q53 How much money would you be willing to spend on a **insert brand name from Q51 here car audio system?**

1. None (\$0)
2. \$1-\$150
3. \$151-\$375
4. \$376-750
5. \$751-\$1150
6. \$1151-\$1500
7. \$1501-\$2250
8. \$2251-\$4500

- 9. \$4501-\$7500
- 10. \$7500+

ASK ONLY NEW CAR INTENDERS (Q4 [1])
 SINGLE SELECT

Q54 Do you own or have ever owned a branded car audio system?

- 1. Currently own
- 2. Used to own
- 3. Never owned

ASK ONLY THOSE WHO ANSWERED Q54 (1. OR 2.)
 MULTI SELECT
 MULTIPLE SELECTROTATE/RANDOMIZE 1-40,42

Q55 Do you own or have ever owned any of the following branded car audio system?

<ul style="list-style-type: none"> 1. Alpine 2. Arkamys 3. Beats Audio 4. Bang & Olufsen 5. Blaupunkt 6. Bose 7. Boston Acoustics 8. Bowers & Wilkins 9. Burmester 10. Canton 11. Clarion 12. Denon 13. Dimension 14. Dolby 15. DTS 16. Dynaudio 17. ELS Surround 18. Fender 19. Harman-Kardon 20. Infinity 21. Interscope 22. JBL 23. Kenwood 24. Kicker 	

25. Krell 26. Lear/Philips 27. Lexicon 28. Mark Levinson 29. Meridian 30. Naim 31. Panaray 32. Panasonic 33. Pioneer 34. Philips 35. Revel 36. Rockford Fosgate 37. Shaker 38. Sony 39. THX Certified 40. XBM 42. AKG 41. None of these [ANCHOR/EXCLUSIVE]	
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ASK ONLY THOSE THAT SELECTED ANY BRAND FROM Q55 (1-40,42)
SINGLE SELECT, PER ATTRIBUTE

Q56 How likely would you be to recommend (INSERT BRAND FROM Q55) to others?

1. Extremely likely
2. Likely
3. Neutral
4. Unlikely
5. Extremely unlikely

ASK ONLY THOSE THAT SELECTED 4 OR 5 (UNLIKELY, EXTREMELY UNLIKELY) FROM Q56

ROTATE/RANDOMIZE (1-4)

Q57 Why would you not be likely to recommend this brand to others?

1. I like other brands more
2. Not good quality
3. Not value for money
4. Too expensive
5. Other _____ [ANCHOR] [WRITE IN]

CURRENTLY OR USED TO OWN BRANDED AUDIO SYSTEM (Q55 [1-40,42])
SINGLE SELECT PER ATTRIBUTE

Q58 Would you buy (insert brand from Q55) again?

1. Yes
2. No

WOULD NOT BUY THE SAME BRANDED AUDIO SYSTEM (Q58 [2])
MULTIPLE SELECT
ROTATE/RANDOMIZE (1-7)

Q59 Why would you not buy the same brand again?

1. The car I intend to buy does not feature the audio brand
2. No longer interested in branded car audio
3. Intend to use an aftermarket system
4. Too expensive
5. Not good quality
6. Poor value for money
7. It should come with the car
8. Other _____