

**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

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

**Q6 In what area of the United Kingdom, or region within England, do you currently reside in?**

1. Greater London
2. South East (excl. London)
3. South West
4. East Anglia
5. East Midlands
6. West Midlands
7. Wales
8. Yorkshire and the Humber
9. North West
10. North East
11. Scotland
12. Northern Ireland
13. Outside UK [**ANCHOR/TERMINATE IF RESPONDENT PICKS THIS**]

**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**

1. Less than £15,999
2. £16,000 - £20,999
3. £21,000 - £33,999
4. £34,000 - £47,999
5. £48,000 - £64,999
6. £65,000 - £89,999
7. £90,000 or more
8. I prefer not to answer or I don't know

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

**SINGLE SELECT**

**D1.Are you of Hispanic, Latino, or Spanish origin, such as Mexican, Puerto Rican or Cuban?**

1. Yes
2. No

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

**SINGLE SELECT**

**D2.Which of the following best describes your ethnic origin?**

1. **White/ White British**
  - English / Welsh / Scottish / Northern Irish / British
  - Irish
  - Gypsy or Irish Traveler
  - Any other White background
2. **Mixed / multiple ethnic groups/ Mixed British**
  - White and Black Caribbean
  - White and Black African
  - White and Asian
  - Any other Mixed / multiple ethnic background

**3. Asian / Asian British**

- Indian
- Pakistani
- Bangladeshi
- Chinese

Any other Asian background, write in

**4. Black / African / Caribbean / Black British**

- African
- Caribbean
- Any other Black / African / Caribbean background

**5. Other ethnic groups**

- Arab
- Any other ethnic group, write in

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)

Abarth  
Aixam  
Alfa Romeo  
Ariel  
Aston Martin  
Audi  
BAC  
Bentley  
BMW  
Bugatti  
Caterham  
Cadillac  
Chrysler  
Citroën  
Dacia  
Daewoo  
Dodge  
Ferrari  
Fiat  
Ford  
Great Wall  
Honda  
Hyundai  
Infiniti  
Jaguar  
Jeep  
Kia  
Lamborghini  
Land Rover  
Lexus  
Lotus  
Maserati  
Mazda  
McLaren  
Mercedes-Benz  
MG  
Mini  
Mitsubishi  
Morgan  
Nissan

Perodua  
Peugeot  
Porsche  
Proton  
Renault  
Rolls-Royce  
SEAT  
Saab  
Skoda  
Smart  
SsangYong  
Subaru  
Suzuki  
Tesla  
Toyota  
Vauxhall  
Volkswagen  
Volvo  
Other

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 £9,999
2. £10,000 - £12,999
3. £13,000 - £15,999
4. £16,000 – £19,999
5. £20,000 - £25,999
6. £26,000 – £29,999
7. More than £30,000

**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. Abarth
2. Aixam
3. Alfa Romeo
4. Aston Martin
5. Audi
6. Bentley
7. BMW
8. Bugatti
9. Cadillac
10. Caterham
11. Chevrolet
12. Chrysler
13. Citroën
14. Dacia
15. Dodge
16. DS
17. Ferrari
18. Fiat
19. Ford
20. Great Wall
21. Honda
22. Hyundai
23. Infiniti
24. Isuzu
25. Jaguar



26. Jeep
27. Kia
28. Lamborghini
29. Land Rover
30. Lexus
31. Lotus
32. Mahindra
33. Maserati
34. Mazda
35. McLaren
36. Mercedes-Benz
37. MG
38. Microcar
39. MINI
40. Mitsubishi
41. Morgan
42. Nissan
43. Perodua
44. Peugeot
45. Porsche
46. Proton
47. Renault
48. Rolls-Royce
49. SEAT
50. Skoda
51. Smart
52. SsangYong
53. Subaru
54. Suzuki
55. Tesla
56. Toyota
57. Vauxhall
58. Volkswagen
59. Volvo
60. Other
61. 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 1-31]

	Very desirable <b>[5]</b>	Somewhat desirable <b>[4]</b>	Neither desirable or undesirable <b>[3]</b>	Somewhat undesirable <b>[2]</b>	Very undesirable <b>[1]</b>
1. <b>Bluetooth</b> (e.g., hands-free voice calling)					
2. <b>CD player</b>					
3. <b>Navigation system</b> (e.g. factory installed GPS, turn-by-turn, Sat Nav)					
4. <b>Heated seats</b>					
5.					
6.					
7. <b>Rear seat entertainment</b> (e.g., factory installed screens for rear seat passengers to watch movies, TV, play videogames, etc.)					
8.					
9. <b>Steering wheel mounted controls</b> (e.g., for radio, phone, etc.)					
10. <b>Sunroof/Moon</b>					

<b>roof</b>					
<b>11. Voice recognition</b> (e.g., for hands free/radio)					
<b>12. Automatic climate control</b>					
<b>13. Remote start</b> (e.g., can automatically start the engine from a distance)					
<b>14.</b>					
<b>15. Infotainment system</b> (e.g. display audio system/ informational screen in center console display)					
<b>16. Telematics/ Connected Services</b> (e.g., OnStar, Blue Link, SYNC Connect)					
<b>17. HUD</b> (heads-up display, displays information like speed, direction, etc., on windshield in driver's line of sight)					
<b>18. In-car Wi-Fi</b>					
<b>19.</b>					

20.					
21.					
22. <b>Wireless charging</b> (e.g. can place phone in tray to charge without cord)					
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-£51
2. £51-£100
3. £101-£150
4. £151-£200
5. £201-£250
6. £251-300
7. £301-£400
8. £401-£500
9. £501-£600
10. £601-£700
11. £701-£1000
12. £1001-£1400
13. £1401-£1800
14. £1,801+

ASK ONLY THOSE WHO FIND TELEMATCS SOMEWHAT DESIRABLE OR VERY DESIRABLE (Q14, ATTRIBUTE 16 (SOMEWHAT DESIRABLE; VERY DESIRABLE)

SELECT UP TO 3 ATTRIBUTES

ROTATE/RANDOMIZE

**Q16** Thinking about telematics system, what are the top features that interest you? You can select up to 3 attributes.

1. **Automatic crash notification/response** (i.e., 911, emergency medical services)

2. **Roadside assistance** (i.e., no fuel, flat tire, breakdown, etc.)
3. **Hands-free calling** (e.g., ability to call without pairing cellphone or using its minutes)
4. **Access to a human customer car assistant** (i.e., being able to contact a call center for help with finding location, unlocking car, medical emergency)
5. **Wi-Fi hotspot** (i.e., ability to pair mobile devices to the internet)
6. **Service maintenance notifications** (e.g., alerts when it is time to change oil, etc.)
7. **Controlling vehicle systems from my smartphone** (i.e., lock/unlock doors, windows, horn, alarm, ignition, etc.)
8. **Turn-by-turn navigation**
9. **Stolen vehicle assistance** (e.g., turns off ignition, slows down vehicle)
10. **Theft alarm notification** (i.e., notifies you if alarm sounds)
11. **Concierge services** (e.g., book hotels, restaurant reservations, concerts, etc.)
12. **Parking location reminder/find my car**
13. **Family services** (e.g., alerts you of teen/dependent driving behavior)
14. **Valet alert** (e.g. notification if vehicle is being used inappropriately when in the hands of valet, technician, etc.)
15. **None of the above** [EXCLUSIVE] [ANCHOR]

ASK ONLY THOSE WHO FIND TELEMATICS, INFOTAINMENT SYSTEMS, TELEMATICS, INTERNET STREAMING RADIO, SOMEWHAT DESIRABLE OR VERY DESIRABLE (Q14, ATTRIBUTE 3, 15, 16, 14 (SOMEWHAT DESIRABLE; VERY DESIRABLE))

SELECT UP TO 3 ATTRIBUTES

LIST CHANGES PER EACH MARKET

ROTATE/RANDOMIZE

LIST CHANGES PER EACH MARKET

MULTI-SELECT

ASK ONLY THOSE WHO FIND NAVIGATION SOMEWHAT DESIRABLE OR VERY DESIRABLE (Q14, ATTRIBUTE 3 (SOMEWHAT DESIRABLE; VERY DESIRABLE))

SELECT UP TO 3 ATTRIBUTES

ROTATE/RANDOMIZE

**Q16\_1 Thinking about navigation systems and software, what are the top features that interest you? You can select up to 3 attributes.**

1. **Real-time traffic information** (e.g. where and when traffic congestion occurs)
2. **Dynamic routing** (e.g., turn-by-turn navigation that reroutes based on latest traffic information, closed street information, etc.)
3. **Send to car** (e.g. ability to send destination information searched on smartphone or computer to car's navigation unit)
4. **Parking lot/ parking garage finder** (e.g. parking lot hours, prices, etc)
5. **On-street parking finder** (e.g., available nearby vacant on-street parking)
6. **Fuel station details** (e.g. latest fuel price information, station address, station brand, fuel types, hours, etc.)
7. **EV-charging station details** (e.g. EV charging stations, type, number of connectors available, hours, etc.)

8. **Weather information** (e.g. current and upcoming weather conditions)
9. **Smartphone companion app** (e.g. a smartphone navigation app with turn-by-turn navigation that guides pedestrian after leaving the car, and or remembers parking location)
10. **Maps that can be updated wirelessly**
11. **Restaurant information and services** (e.g. reviews, location, hours, pricing, reservation booking system, etc.)
12. **Emergency information** (e.g. location of nearest hospital, police station, and other emergency services based on latest location)
13. **None of the above** [EXCLUSIVE] [ANCHOR]

**Q16\_2 Which of the following in-car telematics or multimedia brands do you recognize?**

1. Vauxhall OnStar
2. Ford SYNC
3. Uconnect (Jeep/Fiat)
4. Peugeot Connect
5. Citroën Connect
6. Renault R-LINK
7. Vauxhall IntelliLink
8. Cadillac CUE
9. Kia UVO
10. Audi Connect
11. Volkswagen Car-Net
12. Toyota Touch
13. BMW ConnectedDrive
14. Mercedes-Benz COMAND Online System
15. Honda Connect
16. MZD-Connect
17. Subaru StarLink
18. Jaguar/Land Rover InControl
19. NissanConnect
20. Infiniti InTouch
21. Skoda Connect
22. Volvo Sensus Connect
23. Other [WRITE IN]

THOSE WHO ANSWERED RECONGIZED “Which of the following in-car telematics or multimedia brands do you recognize?” [1-23]

MULTI SELECT

ROTATE/RANDOMIZE

LIST CHANGES PER EACH MARKET

**Q16\_3 Which brand(s) would be most influential during your decision of buying a new car?**

1. Vauxhall OnStar
2. Ford SYNC
3. Uconnect (Jeep/Fiat)
4. Peugeot Connect
5. Citroën Connect
6. Renault R-LINK
7. Vauxhall IntelliLink
8. Cadillac CUE
9. Kia UVO
10. Audi Connect
11. Volkswagen Car-Net
12. Toyota Touch
13. BMW ConnectedDrive
14. Mercedes-Benz COMAND Online System
15. Honda Connect
16. MZD-Connect
17. Subaru StarLink
18. Jaguar/Land Rover InControl
19. NissanConnect
20. Infiniti InTouch
21. Skoda Connect
22. Volvo Sensus Connect

**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 6 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 1-15

LIST CHANGES PER EACH MARKET

**Q20\_1 Which mobile carrier are you utilizing?**

1. EE
2. O2
3. Three
4. Talkmobile
5. Tesco Mobile
6. Mobile by Sainsburys
7. Virgin
8. Sky Mobile
9. Plusnet
10. GiffGaff
11. FreedomPop
12. BT Mobile
13. iD Mobile
14. TPO Mobile
15. Vodafone

**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 SMARTPHONE OWNERS (Q18 [1])  
IN THE CURRENCY OF EACH MARKET**

**Q23 What is the most you have paid for an app on your smartphone?**

1. £1-£3
2. £4-£6
3. £7-£13
4. £14-£30

5. More than £30

ASK ONLY SMARTPHONE OWNERS (Q18 [1])

SELECT UP TO 5

ROTATE/RANDOMIZE 1-20

**Q24 Please select your top 5 favorite app categories for use on your smartphone while in the vehicle.**

1. **Books** (e.g., can read eBooks, or listen to audio books.)
2. **Business/Productivity** (e.g., task/notes management, hours tracking, office suite, etc)
3. **Education** (e.g., can learn a new language, take a class, course material, etc)
4. **Video** (e.g., watch streaming video or video stored on smartphone, etc)
5. **Music** (e.g., listening to streaming audio music, comedy, spoken word, etc)
6. **Podcast**
7. **Social Networking**
8. **Navigation** (e.g., turn-by-turn navigation, real-time traffic information, parking , etc)
9. **Communicating** (e.g., Google Hangouts, Skype, Kik, WhatsApp, LINE)
10. **Remote services** (i.e., Vehicle services, remote garage door openers, remote vehicle controls, smart home/appliances/electronics controls, etc.)
11. **Finance** (e.g., lets you manage your finances, look at stocks, etc.)
12. **Food & Drink** (e.g., helps you search and book restaurants)
13. **Point of interest (POI)/Local** (e.g., business locations and reviews, look up free Wi-Fi locations, etc)
14. **Travel** (e.g., helps book travel, find a travel destination, etc)
15. **Driver's aid** (i.e., eco driving advice, cheapest gas station, traffic cameras, etc)
16. **Games**
17. **Health & Fitness** (e.g., pedometer information, nutrition information, etc)
18. **News**
19. **Sports** (e.g., scores, fantasy leagues, sport news, etc)
20. **Weather**

ASK ONLY SMARTPHONE OWNERS (Q18 [1])

MULTIPLE SELECT

ROTATE/RANDOMIZE 1-11

**Q25 Which of the following statements, if any, about using your smartphone in your car do you agree with?**

	Strongly Agree (5)	Agree (4)	Disagree (3)	Strongly Disagree (2)	I have no opinion (1)
1. I think using my smartphone while driving is distracting					
2. I prefer controlling my smartphone with in-vehicle steering wheel controls					
3. I prefer controlling my smartphone with in-vehicle voice controls					
4. I prefer to put my smartphone in a cradle that lets me see the screen as I drive					
5. I prefer interacting and controlling my smartphone through an in-vehicle touchscreen					
6. I prefer to utilize Bluetooth pairing to make phone calls with my smartphone					

7. I prefer to utilize Bluetooth pairing to stream audio from my smartphone to the in-vehicle stereo system					
8. I'd prefer to utilize apps in the car without having to pair my smartphone					
9. I use my phone as a navigation aid to get directions or point-of-interest (POI) when driving					
10. I often pair my smartphone to my car through USB					
11. I prefer using my smartphone in my vehicle, as opposed to in vehicle controls					

**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

**ASK ONLY DISPLAY AUDIO/INFOTAINMENT/NAVIGATION (Q26 [1])**

**SINGLE SELECT**

**Q27 Does your vehicle’s built-in display audio (i.e., infotainment system) or navigation system have smartphone-like apps (e.g., TuneIn, Deezer, Google Local Search) installed directly to the system?**

*example*



1. Yes
2. No

ASK ONLY DISPLAY AUDIO/INFOTAINMENT/NAVIGATION (Q26 [1])  
SINGLE SELECT

**Q28 Would you be willing to pay to update software on your vehicle, either to add functionality, or to improve performance or the user experience?**

1. Yes
2. No

ASK ONLY DISPLAY AUDIO/INFOTAINMENT/NAVIGATION (Q26 [1])  
MULTI SELECT  
ROTATE 1-14

**Q29 Which of the following statements, if any, about built-in display systems (i.e., infotainment system) do you agree with?**

1. These system are too complex to use while driving [CAN'T BE SELECTED WITH 2]
2. I think these systems enhance the driving experience [CAN'T BE SELECTED WITH 1]
3. These systems seem dated compared to other electronic devices
4. I want the ability to use gestures and controls in my car similarly to how I do on a smartphone (i.e., swipe, pinch-to-zoom, etc.)
5. I'm worried about potential software bugs and reliable issues on in-vehicle display screens (e.g., infotainment systems)
6. I'm worried that in-vehicle display screens (e.g., infotainment systems) won't get updated as the vehicle ages
7. I'm concerned about security issues and/or my privacy when using infotainment systems
8. I wish my system could be updated wirelessly so I didn't have to take it into a dealer for updates
9. I wouldn't pay for a subscription to DAB radio
10. I will take the time to learn how my infotainment system works
11. I prefer having a infotainment system that I can understand immediately
12. Automakers are doing a good job designing infotainment systems
13. The type of infotainment system in my next car will be an important purchasing decision
14. I would like someone at my dealership to give me a brief tutorial of the infotainment system when buying my next car
15. None of the above [ANCHOR] [EXCLUSIVE]

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

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

SINGLE SELECT

ROTATE/RANDOMIZE 1-16

LIST WILL CHANGE PER EACH MARKET

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

1. Apple Music
- ~~2.~~
3. Blinkbox Music
4. Deezer
5. Google Play Music
- ~~6.~~
7. Amazon Music Unlimited
8. MixCloud
9. Napster
10. O2 Tracks
11. Qobuz
12. PlayStation Music
13. Spotify
14. Tidal
15. TuneIn
16. Groove Music
17. Other \_\_\_\_\_ [ANCHOR/EXCLUSIVE]

ASK ONLY SMARTPHONE OWNERS (Q18 [1])

SINGLE SELECT

**Q38 How often do you use a navigation app on your smartphone for driving?**

1. Never
2. Less than Once a Month
3. Once a Month
4. 2-3 Times a Month
5. Once a Week
6. 2-3 Times a Week
7. Daily



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

**Q39 some new vehicles will have the ability to replicate your smartphone system onto an in-vehicle display. Which of the following systems, if any, have you heard of?**

	Aware of		
	I've heard of this (A)	I'm not sure (B)	I haven't heard of this (C)
1. Apple CarPlay			
2. Android Auto			
3. MirrorLink			
4. SYNC AppLink			

ASK ONLY HAVE HEARD OF THIS (Q39 [A])  
SINGLE SELECT PER ATTRIBUTE

**Q40 If you have heard of this system, are you interested in having and using this feature in your next vehicle?**

	Interest in			
	Interested (A)	Somewhat interested (B)	Not really interested (C)	No interest (D)
1. Apple CarPlay				
2. Android Auto				
3. MirrorLink				
4. SYNC AppLink				

ASK ONLY DISPLAY AUDIO/INFOTAINMENT/NAVIGATION (Q26 [1])  
MULTIPLE SELECT  
ROTATE/RANDOMIZE 1-9

**Q41 Which of the following statements, if any, about using in-vehicle based apps do you agree with?**

1. I would be willing to pay for in-vehicle apps if they helped limit driving distractions
2. I'd prefer using in-vehicle apps if my car had a separate data plan than my phone
3. I would be willing to use in-vehicle apps if the apps are similar to the ones I use on my smartphone
4. I'm only interested in in-vehicle apps that are connected through my smartphone
5. I'm only interested in in-vehicle apps if they are free
6. I'm concerned about my privacy in regards to in-vehicle apps
7. There aren't enough apps available currently on in-vehicle systems
8. I would utilize in-vehicle apps if they helped enhance the driving experience
9. I prefer the user experience on my smartphone rather than what is offered on in-vehicle systems
10. None of the above **[ANCHOR] [EXCLUSIVE]**