

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])
ONLY US

ORDER ALPHABETICALLY ANCHORING "I DO NOT RESIDE IN THE UNITED STATES"

Q6 In what US state do you currently reside?

1. Alabama
2. Alaska
3. Arizona
4. Arkansas
5. California
6. Colorado
7. Connecticut
8. Delaware
9. District of Columbia
10. Florida
11. Georgia
12. Hawaii
13. Idaho
14. Illinois
15. Indiana
16. Iowa
17. Kansas
18. Kentucky
19. Louisiana
20. Maine
21. Maryland
22. Massachusetts
23. Michigan
24. Minnesota
25. Mississippi
26. Missouri
27. Montana
28. Nebraska
29. Nevada
30. New Hampshire
31. New Jersey
32. New Mexico
33. New York
34. North Carolina
35. North Dakota
36. Ohio
37. Oklahoma
38. Oregon
39. Pennsylvania
40. Rhode Island
41. South Carolina
42. South Dakota
43. Tennessee
44. Texas

45. Utah
46. Vermont
47. Virginia
48. Washington
49. West Virginia
50. Wisconsin
51. Wyoming
52. I do not reside in the United States - **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 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.What is your racial background?

1. White
2. Black or African-American
3. Asian or Asian-American
4. Native American/American Indian/Alaska Native
5. Native Hawaiian/Other Pacific Islanders
6. Some other race, 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.					
6.					
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. Voice recognition (e.g., for hands free/radio)					
12. Automatic climate control					
13. Remote start (e.g., can automatically start the engine from a distance)					
14.					
15. Infotainment system (e.g. display audio system/ informational screen in center console display)					
16. Telematics/Connected Services (e.g., OnStar, Blue Link, SYNC Connect)					
17. HUD (heads-up display, displays information like speed, direction,					

etc., on windshield in driver's line of sight)					
18. In-car Wi-Fi					
19.					
20.					
21.					
22. Wireless charging (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-\$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 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 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]

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)
LIST CHANGES PER EACH MARKET
ROTATE/RANDOMIZE
LIST CHANGES PER EACH MARKET
MULTI-SELECT

Q16_2 Which of the following in-car telematics or multimedia brands do you recognize?

1. GM OnStar
2. SiriusXM
3. Ford SYNC
4. Uconnect (Chrysler/Dodge/Jeep/Ram/Fiat/SRT)
5. Chevrolet MyLink
6. GMC/Buick IntelliLink
7. Cadillac CUE
8. Kia UVO
9. Audi Connect
10. Volkswagen Car-Net
11. Toyota Entune
12. Lexus Enform
13. Hyundai Blue Link
14. BMW ConnectedDrive
15. Mercedes-Benz mbrace
16. HondaLink
17. Mazda Connect
18. Subaru StarLink
19. Jaguar/Land Rover InControl
20. HD Radio
21. AcuraLink
22. NissanConnect
23. Infiniti InTouch
24. Other [WRITE IN]

THOSE WHO ANSWERED RECONGIZED "Which of the following in-car telematics or
multimedia brands do you recognize?" [1-24]
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. GM OnStar
2. SiriusXM
3. Ford SYNC
4. Uconnect (Chrysler/Dodge/Jeep/Ram/Fiat/SRT)
5. Chevrolet MyLink
6. GMC/Buick IntelliLink
7. Cadillac CUE
8. Kia UVO
9. Audi Connect
10. Volkswagen Car-Net
11. Toyota Entune
12. Lexus Enform
13. Hyundai Blue Link
14. BMW ConnectedDrive
15. Mercedes-Benz mbrace
16. HondaLink
17. Mazda Connect
18. Subaru StarLink
19. Jaguar/Land Rover InControl
20. HD Radio
21. AcuraLink
22. NissanConnect
23. Infiniti InTouch

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. Verizon
2. AT&T (incl. AT&T GoPhone)
3. Sprint (incl. Boost Mobile, Virgin Mobile, payLo by Virgin Mobile)
4. T-Mobile US (incl. GoSmart)
5. TracFone (incl. NET10 Wireless, SafeLink Wireless, Straight Talk, Telcel América)
6. MetroPCS
7. US Cellular
8. Cricket Wireless

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. Less than \$1
2. \$1-\$2
3. \$3-\$5
4. \$6-\$10
5. \$11-\$20
6. \$21-\$50
7. More than \$50

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., Pandora, 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 (i.e., cybersecurity issues)
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 satellite 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. HD Radio
3. Satellite Radio
4. Stored on mobile device (phone, iPod, USB, etc.)
5. Internet/Streaming (such as Pandora/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 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., Pandora One, 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. Amazon Music with Prime
4. Apple Music
5. Google Play Music
6. Pandora
7. Rhapsody
8. iHeartRadio
9. TuneIn Radio
10. SoundCloud
11. Microsoft Groove Music (previously Xbox Music and Zune Music)
12. Slacker Radio
13. Aha Radio

- 14. Stitcher
- 15. Kindle
- 16. Audible
- 17. PlayStation Music
- 18. Other _____ [ANCHOR]

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]