

Ofcom In-car Audio Survey

V19

Base: All UK adults (16+)

Question type: **Single**

[Vlabel - Weekly passenger screener]

[POCC_Q1] Do you usually travel as a passenger or a driver in a car, van or lorry at least once a week?

<1>	Yes, I do
<2>	No, I do not
<977 fixed xor>	Don't know

Base: All UK adults (16+) that travel as passenger or driver in car, van or lorry at least once a week

Question type: **Grid-Check**

#row order: randomize

[Vlabel - Most of time - passenger/driver and type of vehicle]

[POCC_Q2] Which one of these would you say you spend most of your time as, in a typical week? (Please select the one option that best applies. If you are unsure, please give your best estimate)

-[POCC_Q2_1]	Car
-[POCC_Q2_2]	Van
-[POCC_Q2_3]	Lorry/truck
<1>	As a driver
<2>	As a passenger

Base: All UK adults (16+) that travel as passenger or driver in car, van or lorry at least once a week

Question type: **Single**

#row order: randomize

[Vlabel - Type of smartphone most commonly used]

[POCC_Q3] Which one, if any, of these smartphones do you personally use most often? (If you do not use a smartphone, please select the "Not applicable" option)

<1>	Android (e.g. Samsung Galaxy, Google Pixel etc.)
<2>	iOS (i.e. Apple iPhone)
<955 fixed>	Other (open [POCC_Q3_open]) [open] please specify
<977 fixed xor>	Don't know
<999 fixed xor>	Not applicable - I do not use a smartphone

Base: All UK adults(16+) that travel as passenger or driver in car,van or lorry at least once a week, and use a smartphone

Question type: **Multiple**

#row order: randomize

#Question display logic:

If [POCC_Q3] - Android (e.g. Samsung Galaxy, Google Pixel etc.) or iOS (i.e. Apple iPhone) or Other or Don't know, is selected [if POCC_Q3 in [1,2,955,977]]

[Vlabel - Connect smartphone to vehicle]

[POCC_Q4b] When travelling \$travelmethod, how do you connect your smartphone to the \$vehicle? (Please select all that apply. If you never connect your smartphone to the \$vehicle, please select the "Not applicable" option)

- <1> Bluetooth connection
- <2> Wi-Fi connection
- <3> Wired connection
- <977 fixed xor> Don't know
- <999 fixed xor> Not applicable - I never connect my smartphone to the \$vehicle

Base: All UK adults (16+) that travel as passenger or driver in car, van or lorry at least once a week, use a smartphone and connect it to vehicle

Question type: **Single**

#Question display logic:

if POCC_Q4b.has_any([1,2,3])

[Vlabel - Use voice commands when smartphone connected to vehicle]

[POCC_Q5] When you have your smartphone connected to the \$vehicle, do you ever use voice commands to control it?

- <1> Yes, I do
- <2> No, I do not
- <977 fixed xor> Don't know

Base: All UK adults (16+) that travel as passenger or driver in car, van or lorry at least once a week, use a smartphone and connect it to vehicle, and use voice commands

Question type: **Multiple**

#row order: randomize

#Question display logic:

If [POCC_Q5] - Yes, I do, is selected [if POCC_Q5 in [1]]

[Vlabel - Reasons used voice assistant in vehicle]

[POCC_Q6] For which of the following reasons have you ever used your smartphone's voice assistant in the \$vehicle? (Please select all that apply)

- <1> To make/receive calls
- <2> To compose text messages
- <3> For navigation
- <4> To select music through a streaming service
- <5> To select podcasts through a streaming service

- <6> To select radio stations
- <7> To select another audio output
- <955 fixed> Another reason (open [POCC_Q6_open]) [open] please specify
- <977 fixed xor> Don't know/can't recall

Base: All UK adults (16+) that travel as passenger or driver in car, van or lorry at least once a week

Question type: **Single**

[Vlabel - Touch screen in vehicle]

[POCC_Q7] When travelling \$travelmethod, does that \$vehicle have a touch screen for media options?

- <1> Yes, it does
- <2> No, it does not
- <977 fixed xor> Don't know

Base: All UK adults (16+) that travel as passenger or driver in car, van or lorry at least once a week

Question type: **Grid**

#row order: randomize#Transposing rows and columns

[Vlabel - Frequency of feature use in vehicle]

[POCC_Q8] How often, if at all, are the following features used by yourself/someone else while you are travelling \$travelmethod? (Please select all that apply in each column)

- [POCC_Q8_1] **FM/DAB radio**
- [POCC_Q8_2 fixed] **Apple CarPlay** for connecting to an iPhone/iPad and accessing **audio (e.g. radio or online music)** through the device
- [POCC_Q8_3 fixed] **Android Auto** for connecting to an Android phone or device and accessing **audio (e.g. radio or online music)** through the device
- [POCC_Q8_4 fixed] **Apple CarPlay** to connect an iPhone to the vehicle for **reasons other than to stream** audio content (e.g. to use a navigation app)
- [POCC_Q8_5 fixed] **Android Auto** to connect an Android phone to the vehicle for reasons other than to stream audio content (e.g. to use a navigation app)
- [POCC_Q8_6] **Music streaming service on the built-in infotainment system** (i.e. without using your smartphone)
- [POCC_Q8_7] **Streaming video content**
- [POCC_Q8_8] **Playing games using the built-in infotainment system** on a screen in the vehicle
- <1> Used at least once a week
- <2> Used less than once a week
- <3> \$Vehiclecap has this feature, but it is not used
- <4> \$Vehiclecap does not have this feature
- <977 fixed xor> Don't know

Base: All UK adults (16+) that travel as passenger or driver in car, van or lorry at least once a week

Question type: **Multiple**

[Varlabel - Personally select/control radio or other audio]

[POCC_Q9] When travelling \$travelmethod, do you ever personally select/control the radio or other forms of audio to listen to? (Please select all that apply)

- <1> Yes, I select/control the radio
- <2> Yes, I select/control other forms of audio
- <3 fixed xor> No, I do not select/control the radio or other forms of audio
- <977 fixed xor> Don't know

Base: All UK adults (16+) that travel as passenger or driver in car, van or lorry at least once a week and personally select/control the radio

Question type: **Grid-Check**

#row order: randomize(Rand03) #column order: randomize(Rand05)#Transposing rows and columns

#Question display logic:

If [POCC_Q9] - Yes, I select/control the radio is selected [if 1 in POCC_Q9]

[Varlabel - Methods for controlling radio]

[POCC_Q10] Which, if any, of the following ways do you ever use to control the radio when travelling \$travelmethod? (Please select all that apply in each column)

- [POCC_Q10_1] Select/change radio stations
- [POCC_Q10_2] Change volume
- [POCC_Q10_3 fixed] Switch to other types of audio (e.g. music streaming/CD players)
- <1> Physical button/dial on the \$vehicle's dashboard/control panel
- <2> Touch screen built into the \$vehicle
- <3 if (1 in POCC_Q2_1 or 1 in POCC_Q2_2 or 1 in POCC_Q2_3)> Controls on or near the steering wheel
- <4 fixed> Voice control built into the \$vehicle (which doesn't use your smartphone)
- <5 fixed> Voice control via a smartphone or other device accessory that you have connected to the \$vehicle (e.g. Amazon Echo Auto)
- <988 fixed xor> None of these
- <977 fixed xor> Don't know

#option display logic:

<2> - If [POCC_Q7] - Yes, it does is selected [if POCC_Q7 == 1]

Base: All UK adults (16+) that travel as passenger or driver in car, van or lorry at least once a week and personally select/control other forms of audio

Question type: **Grid-Check**

#row order: randomize(Rand03) #column order: randomize(Rand05)#Transposing rows and columns

#Question display logic:

*If [POCC_Q9] - Yes, I select/control other forms of audio is selected [if 2 in POCC_Q9]
[Varlabel - Methods for controlling other forms of audio]*

[POCC_Q11] Which, if any, of the following ways do you ever use to control the types of audio other than radio when travelling \$travelmethod? (Please select all that apply in each column)

- [POCC_Q11_1] Switch music/tracks
- [POCC_Q11_2] Change volume
- [POCC_Q11_3 fixed] Switch to other types of audio (e.g. radio/CD players)
- <1> Physical button/dial on the \$vehicle's dashboard/control panel
- <2> Touch screen built into the \$vehicle
- <3 if (1 in POCC_Q2_1 or 1 in POCC_Q2_2 or 1 in POCC_Q2_3)> Controls on or near the steering wheel
- <4 fixed> Voice control built into the \$vehicle (which doesn't use your smartphone)
- <5 fixed> Voice control via a smartphone or other device accessory that you have connected to the \$vehicle (e.g. Amazon Echo Auto)
- <988 fixed xor> None of these
- <977 fixed xor> Don't know

#option display logic:

<2> - If [POCC_Q7] - Yes, it does is selected [if POCC_Q7 == 1]

Base: All UK adults (16+) that travel as passenger or driver in car, van or lorry at least once a week and personally use voice control when controlling radio or other audio

Question type: Grid-Check

#row order: randomize #column order: randomize#Transposing rows and columns

#Question display logic:

if POCC_Q10_1.has_any([4,5]) or POCC_Q10_2.has_any([4,5]) or POCC_Q10_3.has_any([4,5]) or POCC_Q11_1.has_any([4,5]) or POCC_Q11_2.has_any([4,5]) or POCC_Q11_3.has_any([4,5])

[Varlabel - How they use voice assistants/systems]

[POCC_Q12] You said you use voice control in the \$vehicle to control the audio/radio in some way.

Which of the following voice assistants/systems do you use to do this? (You may use more than one of these and/or activate the voice assistant in more than one way. Please select all that apply in each column. If you do not use a voice assistant/system via the method specified, please select the "Not applicable" option)

- [POCC_Q12_1] Via a smartphone
- [POCC_Q12_2] Via an add-on device for your \$vehicle that you have bought (e.g. Amazon Echo Auto, aftermarket infotainment screen/system)
- [POCC_Q12_3] Built into the \$vehicle itself (does not need a smartphone or an add-on device)
- <1> Amazon Alexa (wake command often 'Alexa...')
- <2> Google Assistant (wake command often 'Hey Google...')
- <3> Apple Siri (wake command often 'Hey Siri...')
- <4> Microsoft Cortana (wake word often 'Cortana')

<5> Samsung Bixby (wake command often 'Hey Bixby')
 <6 fixed> My \$vehicle manufacturer's own voice assistant
 <7 fixed> Other voice assistant (not Alexa, Google Assistant, Siri, Cortana or my \$vehicle manufacturer's own assistant)
 <977 fixed xor> I don't know which voice assistant I use via this method
 <999 fixed xor> Not applicable - I do not use a voice assistant via this method

Base: All UK adults (16+) that travel as passenger or driver in car, van or lorry at least once a week

Question type: Dyngrid

#row order: randomize

[Vlabel - Level of agreement with statements]

[POCC_Q13] To what extent do you agree or disagree with the following statements about listening to audio when you are travelling in a vehicle, in general?

- [POCC_Q13_1]	I find it easy to access and listen to radio stations	- [POCC_Q13_8]	I would pay to subscribe to a built-in video streaming service
- [POCC_Q13_2]	I find it easy to use the built-in infotainment system	- [POCC_Q13_9]	Having a radio in the vehicle is essential to me
- [POCC_Q13_3]	The built-in voice control in the vehicle understands me first time	- [POCC_Q13_10]	Having music streaming services available in the vehicle is essential to me
- [POCC_Q13_4]	I find it easy to use voice control to access the radio	- [POCC_Q13_11]	Having the ability to stream video to built-in screens is essential to me
- [POCC_Q13_5]	I would pay to subscribe to a mobile data plan for when I travel in a vehicle	- [POCC_Q13_12]	If I wasn't able to access the radio in the car it wouldn't bother me
- [POCC_Q13_6]	I would pay to subscribe to a built-in music streaming service	- [POCC_Q13_13]	I sometimes struggle to work out how to use the radio
- [POCC_Q13_7]	I value being able to listen to the radio in a vehicle	- [POCC_Q13_14]	Having access to my music streaming services in the vehicle means I now listen to less radio

<1> Strongly agree
 <2> Tend to agree
 <3> Neither agree nor disagree
 <4> Tend to disagree
 <5> Strongly disagree
 <977 fixed xor> Don't know/Not applicable