Survey: In-car Audio

Technical Report
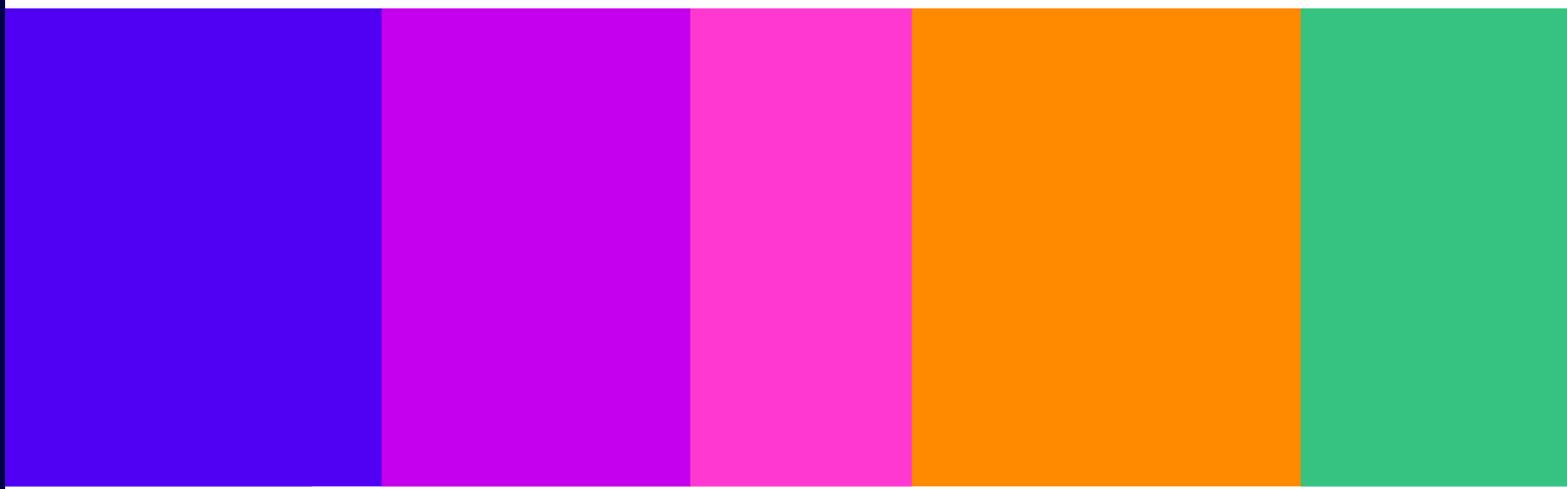
Contents

Section

1. Introduction

Preface

The In-car Audio survey was undertaken by YouGov on behalf of Ofcom. The core objective of this study was to better understand how drivers and passengers connect their smartphones to their vehicle, and how people use the different audio features within their vehicle.

Specifically, the key aims and objectives are to:

- Understand how drivers and passengers use their smartphones to connect to their vehicle while traveling

- Explore the audio features available in UK adults' vehicles, and how they are utilised, and investigate behaviours and attitudes around using audio features in cars

Summary of approach

YouGov is a professional research and consulting organisation, focused on collecting high quality, in-depth data for market research.

This research was conducted with a nationally representative sample (aged 16+) of adults in the UK.

All research was carried out online, with respondents recruited from YouGov's online panel, containing around 2,668,204 panellists from all over the UK.

Significance testing and data redaction

Data tables were run using Quantipy. Significance testing (using t-tests) has been applied at 95% for the purposes of analysis.

In the standard tables, low base sizes (between 10-49) are italicised. In the summary tables, lower base sizes (below 100) are indicated by a single asterisk. Data with a base size of below 10 has been redacted from all data tables.

2. Sampling

Sample design

The sample was drawn from the YouGov online panel comprising around 2.7M adults across the UK. YouGov maintains engagement with communities of panellists who have specifically opted in to participate in online research activities and provide demographic details. As a result, the panel provides access to a responsive audience, who have already provided information on important demographic, attitudinal, and lifestyle attributes. Members of the panel consent to completing surveys for YouGov in return for a modest financial incentive.

The sample was designed to be representative of all UK adults aged 16+, recruiting online panellists only. Most demographic information (e.g. age, gender, social grade/socio-economic group (SEG), working status, region) was information declared and collected by YouGov from its panellists as part of the initial signing up process. This information is updated regularly by panellists, where applicable.

YouGov carried out the following standard checks during and post-fieldwork:

- Quality trap questions

- Identifier checks

- Attention checks

- Inattentiveness checks

- Hyper activeness scanning

- Speed monitoring

- Open-ended responses are reviewed for clarity and accuracy by project managers

Quotas

Interview quotas were applied so that the final sample was nationally representative of all UK adults aged 16+ by age, gender and education level (interlocked), region, and social grade/socio-economic group (SEG), using an online sample.

All fieldwork used UK nationally representative quotas to ensure the data is as nationally representative of the UK as possible. Once the survey is complete, the final data is then statistically weighted to the national profile of all adults aged 16+ (including people without internet access). Data is weighted by age, gender, social grade/SEG, region and level of education (with some interlocking) to ensure that the number of high-income older people sampled will be representative of the population. The targets for this weighting are derived from the following sources:

- 2011 Census Data

- Large scale random probability surveys, such as the Labour Force Survey, The National Readership survey and the British Election Study

- Official ONS population estimates (based on ONS mid-year population estimates for age/gender from 2018)

Fieldwork and Weighting

All interviews were conducted online between 26th – 27th June 2024 using the YouGov bespoke online survey platform and panel.

YouGov interviewed a sample of 2,117 adults aged 16+ in the UK. Sampling involves eligible YouGov panellists being sent an email inviting them to participate in a survey, with the respondents then directed towards the survey which requires their participation most. This is determined by the aforementioned quotas on age, gender, region, social grade and education level, as well as taking into consideration estimated fieldwork timings.

The data was weighted to be nationally representative of the UK 16+ population on age, gender and education level (interlocked), and overall, to the region and SEG profiles, using an online sample.

The screener question below was included to exclude those who don't regularly travel as a passenger or driver in a car, van or lorry. Those who selected "No, I do not" or "Don't know" were exited from the survey. As a result, the sample was reduced from 2,117 to 1,540 participants.

[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

The following table shows both the initial unweighted sample and the final weighted sample profiles. This data is representative of the 2,117 participants who initially took the survey, and does not take into consideration those who were screened out at POCC_Q1.

Demographic group	Unweighted counts	Unweighted %	Weighted counts	Weighted %
Male	1020	48%	1027	48%
Female	1097	52%	1090	51%
16-24	264	12%	286	13%
25-34	334	16%	326	15%
35-44	348	16%	344	16%
45-54	389	18%	384	18%
55-64	302	14%	304	14%
55+ (NET)	782	37%	778	37%
65+	480	23%	474	22%
North East	74	3%	76	4%
North West	236	11%	232	11%
Yorkshire and the Humber	182	9%	185	9%
East Midlands	162	8%	157	7%
West Midlands	188	9%	184	9%
East of England	198	9%	201	9%
London	281	13%	277	13%
South East	274	13%	276	13%

South West	189	9%	192	9%
England (NET)	1784	84%	1780	84%
Wales	101	5%	102	5%
Scotland	175	8%	178	8%
Northern Ireland	57	3%	57	3%
ABC1 (NET)	1288	61%	1207	57%
C2DE (NET)	829	39%	910	43%

NET definitions featured in published data tables

Certain subgroups within the sample were grouped together to aid analysis and are featured alongside this report in the published data tables. The definitions of these so-called NETs are in the table below.

POCC_Q4b	Net: Any smartphone connection	<1> Bluetooth connection <2> Wi-Fi connection <3> Wired connection
POCC_Q6	Net: Calls/Text messages	<1> To make/receive calls <2> To compose text messages
	Net: Audio	<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
	Net: Any reason	<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
POCC_Q8	Net: Used	<1> Used at least once a week <2> Used less than once a week
	Net: Have or use feature	<1> Used at least once a week <2> Used less than once a week <3> Vehicle has this feature, but it is not used
POCC_Q8_2 or POCC_Q8_4	Net: Apple CarPlay used	<1> Used at least once a week <2> Used less than once a week
POCC_Q8_3 or POCC_Q8_5	Net: Android Auto used	<1> Used at least once a week <2> Used less than once a week
POCC_Q8_2 or POCC_Q8_4 or POCC_Q8_3 or POCC_Q8_5	Net Apple Carplay/Android Auto used	<1> Used at least once a week <2> Used less than once a week
POCC_Q8_2 or POCC_Q8_3	Net Apple CarPlay/Android Auto - audio content used	<1> Used at least once a week <2> Used less than once a week <3> Vehicle has this feature, but it is not used
POCC_Q8_2 or POCC_Q8_4	Net: Apple CarPlay have or used	<1> Used at least once a week <2> Used less than once a week <3> Vehicle has this feature, but it is not used
POCC_Q8_3 or POCC_Q8_5	Net: Android Auto have or used	<1> Used at least once a week <2> Used less than once a week <3> Vehicle has this feature, but it is not used

POCC_Q8_2 or POCC_Q8_4 or POCC_Q8_3 or POCC_Q8_5	Net Apple Carplay/Android Auto have or used	<1> Used at least once a week <2> Used less than once a week <3> Vehicle has this feature, but it is not used
POCC_Q8_2 or POCC_Q8_3	Net Apple CarPlay/Android Auto - audio content have or used	<1> Used at least once a week <2> Used less than once a week <3> Vehicle has this feature, but it is not used
POCC_Q9	Net: Use radio or other audio	<1> Yes, I select/control the radio <2> Yes, I select/control other forms of audio
	Net: Use radio and other audio	<1> Yes, I select/control the radio AND <2> Yes, I select/control other forms of audio
POCC_Q10	Net: Physical button/dial/control	<1> Physical button/dial on the vehicle's dashboard/control panel <3> Controls on or near the steering wheel
	Net: Voice control	<4> Voice control built into the vehicle (which doesn't use your smartphone) <5> Voice control via a smartphone or other device accessory that you have connected to the vehicle (e.g. Amazon Echo Auto)
POCC_Q11	Net: Physical button/dial/control	<1> Physical button/dial on the vehicle's dashboard/control panel <3> Controls on or near the steering wheel
	Net: Voice control	<4> Voice control built into the vehicle (which doesn't use your smartphone) <5> Voice control via a smartphone or other device accessory that you have connected to the vehicle (e.g. Amazon Echo Auto)
POCC_Q12	Net: Use Alexa, Google, Siri, Cortana or Bixby	<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')
	Net: Know which voice assistant they use in the manner specifed	<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> My vehicle manufacturer's own voice assistant <7> Other voice assistant (not Alexa, Google Assistant, Siri, Cortana or my vehicle manufacturer's own assistant)
	Net: Use any voice assistant in the manner specified	<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> My vehicle manufacturer's own voice assistant <7 > Other voice assistant (not Alexa, Google Assistant, Siri, Cortana or my vehicle manufacturer's own assistant) <977> I don't know which voice assistant I use via this method
POCC_Q13	Net: Agree	<1> Strongly agree <2> Tend to agree
	Net: Disagree	<4> Tend to disagree <5> Strongly disagree