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 <u>buy a vehicle</u> sometime <u>within the next 3 years</u> 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 <u>purchasing decision</u> 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 region of China do you currently reside in?
1. Beijing
2. Tianjin
3. Hebei
4. Shanxi
5. Inner Mongolia
6. Liaoning
7. Jilin
8. Heilongjiang
9. Shanghai
10. Jiangsu
11. Zhejiang
12. Anhui
13. Fujian
14. Jiangxi
15. Shandong
16. Henan
17. Hubei
18. Hunan
19. Guangdong
20. Guangxi
21. Hainan
22. Chongqing
23. Sichuan
24. Guizhou
25. Yunnan
26. Tibet
27. Shaanxi
28. Gansu
29. Qinghai

30. Ningxia
31. Xinjiang
Outside of Mainland China [ANCHOR/TERMINATE IF RESPONDENT PICKS THIS]

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+

Q8 Please indicate your current annual household income
1. Less than ¥10000
2. ¥10001-¥25000
3. ¥25001-¥52000
4. ¥52001-¥107000
5. ¥107001-¥175000
6. ¥175001-¥550000
7. Over ¥550001
8. I prefer not to answer or I don't know

D2.What is your ethnic origin?

1. Han
2. Miao
3. Buyi
4. Man
5. Tujia
6. Other
7. Unknown

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

SINGLE SELECT
D4.Are you the parent or guardian of any children under 18 now living in your household?
1. Yes
2. No

SINGLE SELECT
D5.Do you own or rent your home?
1. Own
2. Rent
3. Other arrangement

SINGLE SELECT

D6.Which of the following best describes the area you live in?
1. Urban
2. Suburban/ village
3. Rural

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]

D8. Do you work from home?
1. Yes
2. No

D9. How often do you work from home?
1. Always
2. Most of the time
3. About half the time
4. Sometimes
5. Never

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)
   1. Audi (奥迪)
   2. BMW (宝马)
   3. Buick (别克)
   4. BYD (比亚迪)
   5. Changan (长安)
   6. Chery (奇瑞)
   7. Chevrolet (雪佛兰)
   8. Citroen (雪铁龙)
   9. Dongfeng (东风)
   10. FAW (一汽)
   11. Ford (福特)

5

12. Foton (福田)
13. Great Wall (长城)
14. Haima (海马)
15. HAVAL (哈佛)
16. Honda (本田)
17. Hyundai (现代)
18. Jianghuai (江淮)
19. Jiangling (江铃)
20. Jinbei (金杯)
21. Kia (起亚)
22. Lifan (力帆)
23. Mazda (马自达)
24. Mercedes-Benz (奔驰)
25. Nissan (日产)
26. Peugeot (标致)
27. Skoda (斯柯达)
28. Suzuki (铃木)
29. Toyota (丰田)
30. Volkswagen (大众)
31. Wuling (上汽通用五菱)
32. Zhonghua (中华)
33. Weiwang (威旺)
34. Geely （吉利）
35. Beijing Auto （北汽）
36. Roewe （荣威）
37. Zotye （众泰）
38. Mitsubishi （三菱）
39. Venucia （启辰）
40. Baojun （宝骏）
41. Land Rover （路虎）
42. Guangzhou Auto (GAC)（广汽）
43. Lexus（雷克萨斯）
44. Volvo （沃尔沃）
45. Jeep（吉普）
46. Cadillac（卡迪拉克）
47. Fiat（菲亚特）
48. Subaru（斯巴鲁）
49. MG（名爵）
50. Renault（雷诺）
51. Infiniti（英菲尼迪）
52. MINI（迷你）
53. Jaguar（捷豹）
54. Dodge（道奇）
55. Smart
56. Maserati（玛莎拉蒂）

57. Qoros（观致）
58. Acura（讴歌）
59. Opel（欧宝）
60. Chrysler（克莱斯勒）
61. Bentley（宾利）
62. Rolls-Royce（劳斯莱斯）
63. Tesla（特斯拉）
64. SEAT（西雅特）
65. Lincoln（林肯）
66. Ferrari（法拉利）
67. Aston Martin（阿斯顿马丁）
68. Daihatsu（大发）
69. Lamborghini（兰博基尼）
70. Lotus (莲花)
71. Alfa Romeo （阿尔法罗密欧）
72. McLaren（麦克拉伦）
73. Other
74. Don't know

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

Q11 How much are you willing to spend on your next new vehicle?
1. Less than ¥60000
2. ¥60000 - ¥99999
3. ¥100000 – ¥169999
4. ¥170000 – ¥239999
5. ¥240000 - ¥299999
6. ¥300000 – ¥400000
7. More than ¥400000

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. Audi (奥迪)
2. BMW (宝马)
3. Buick (别克)
4. BYD (比亚迪)
5. Changan (长安)
6. Chery (奇瑞)
7. Chevrolet (雪佛兰)
8. Citroen (雪铁龙)
9. Dongfeng (东风)
10. FAW (一汽)
11. Ford (福特)
12. Foton (福田)
13. Great Wall (长城)
14. Haima (海马)
15. HAVAL (哈佛)
16. Honda (本田)
17. Hyundai (现代)
18. Jianghuai (江淮)
19. Jiangling (江铃)
20. Jinbei (金杯)
21. Kia (起亚)
22. Lifan (力帆)
23. Mazda (马自达)
24. Mercedes-Benz (奔驰)
25. Nissan (日产)
26. Peugeot (标致)
27. Skoda (斯柯达)
28. Suzuki (铃木)
29. Toyota (丰田)
30. Volkswagen (大众)
31. Wuling (上汽通用五菱)
32. Zhonghua (中华)
33. Weiwang (威旺)
34. Geely （吉利）
35. Beijing Auto （北汽）
36. Roewe （荣威）
37. Zotye （众泰）
38. Mitsubishi （三菱）
39. Venucia （启辰）

40. Baojun （宝骏）
41. Land Rover （路虎）
42. Guangzhou Auto (GAC)（广汽）
43. Lexus（雷克萨斯）
44. Volvo （沃尔沃）
45. Jeep（吉普）
46. Cadillac（卡迪拉克）
47. Fiat（菲亚特）
48. Subaru（斯巴鲁）
49. MG（名爵）
50. Renault（雷诺）
51. Infiniti（英菲尼迪）
52. MINI（迷你）
53. Jaguar（捷豹）
54. Dodge（道奇）
55. Smart
56. Maserati（玛莎拉蒂）
57. Qoros（观致）
58. Acura（讴歌）
59. Opel（欧宝）
60. Chrysler（克莱斯勒）
61. Bentley（宾利）
62. Rolls-Royce（劳斯莱斯）
63. Tesla（特斯拉）
64. SEAT（西雅特）
65. Lincoln（林肯）
66. Ferrari（法拉利）
67. Aston Martin（阿斯顿马丁）
68. Daihatsu（大发）
69. Lamborghini（兰博基尼）
70. Lotus (莲花)
71. Alfa Romeo （阿尔法罗密欧）
72. McLaren（麦克拉伦）
73. Other
74. Don't know

Q14 Which of the following products/features do you consider most desirable when considering the purchase of your next vehicle?

	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., Douban 豆瓣音乐 , Baidu Ting 百度音乐, 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)	

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

1. ¥1-¥300
2. ¥301-¥600
3. ¥601-¥1000
4. ¥1001-¥1500
5. ¥1501-¥2000
6. ¥2001-¥2500
7. ¥2501-¥3000
8. ¥3001-¥4000
9. ¥4001-¥4500
10. ¥4501-¥5000
11. ¥5001-¥6000
12. ¥6001-¥10000
13. ¥10001-¥15000
14. ¥150001+

Q18 Do you currently own a smartphone?
1. Yes
2. No

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

1. Xiaomi 小米
2. Samsung 三星
3. Lenovo 联想
4. Coolpad 酷派
5. Huawei 华为
6. BBK 步步高
7. ZTE 中兴
8. OPPO
9. K-Touch
10. Apple 苹果
11. Microsoft/Nokia 微软/诺基亚
12. LG
13. Sharp 夏普
14. HTC
15. Meizu 魅族
16. Motorola 摩托罗拉
17. Other

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

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

Q20_1 Which mobile carrier are you utilizing?

1. China Mobile 中国移动
2. China Unicom 中国联通
3. China Telecom 中国电信

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

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)

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

16

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 Douban, QQ, Kuwo)
5. CD/DVD Player
6. Stored on in-vehicle hard drive
7. I don't listen to audio in my vehicle [ANCHOR, EXCLUSIVE]

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 ONLY MULTIPLE ATTRIBUTE]
3. Occasionally (e.g., a few times a month) [CAN PLACE MULTIPLE ATTRIBUTES]

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]

Q36 Do you subscribe to a premium streaming radio or on-demand streaming service (e.g., Douban, QQ Music, Kuwo, 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

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

1. 1ting (一听)
2. Baidu Ting （百度听）
3. Wo Music by China Telecom (中国电信沃音乐)
4. Douban（豆瓣）
5. Duomi（多米）
6. Kugou（酷狗）
7. Kuwo（酷我）
8. Netease Cloud Music （网易云音乐）
9. Nokia Mix Radio
10. QQ Music (QQ 音乐)
11. Xiami（虾米）
12. Leguo（乐果）
13. 5sing
14. Qingting FM（蜻蜓 FM）
15. 9box （九天音乐）
16. TTPOD (天天动听)
17. Migu （咪咕）
18. Wangyi Yun (网易云音乐)
Other _____ [ANCHOR/EXCLUSIVE]

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. DAB Radio							
2.							
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)	

Same question attributes as q45 who selected extremely or very important.

ASK ONLY NEW CAR INTENDERS (Q4 [1])
MULTIPLE SELECTROTATE/RANDOMIZE 1-40,42

Q47. Which of these brands do you recognize?

1. Alpine (阿尔派)
2. Arkamys
3. Beats Audio
4. Bang & Olufsen
5. Blaupunkt (蓝宝)
6. Bose
7. Boston Acoustics
8. Bowers & Wilkins
9. Burmester
10. Canton
11. Clarion (歌乐)
12. Denon
13. Dimension
14. Dolby (杜比)
15. DTS
16. Dynaudio
17. ELS Surround
18. Fender
19. Harman-Kardon (哈曼)
20. Infinity
21. Interscope
22. JBL
23. Kenwood (健伍)
24. Kicker
25. Krell
26. Lear/Philips (李尔/飞利浦)
27. Lexicon
28. Mark Levinson
29. Meridian
30. Naim
31. Panaray
32. Panasonic (松下)
33. Pioneer (先锋)
34. Philips (飞利浦)
35. Revel
36. Rockford Fosgate
37. Shaker
38. Sony (索尼)
39. THX Certified
40. XBM
42. AKG
41. None of these [ANCHOR/EXCLUSIVE]

Q48. Where do you recognize these brands from?

Columns:
1. Car Audio
2. Home Audio
3. Other Audio

Q49 Would you prefer to have a brand name car audio system?
1. Yes
2. No Preference
3. No

Q50 How much influence would having a brand name audio system affect your decision when buying a car?
1. Extremely influential
2. Very influential
3. Somewhat influential
4. Slightly influential
5. Not at all influential

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

Alpine (阿尔派) Arkamys	

Beats Audio Bang & Olufsen Blaupunkt（蓝宝） Bose Boston Acoustics Bowers & Wilkins Burmester Canton Clarion (歌乐) Denon Dimension Dolby (杜比) DTS Dynaudio ELS Surround Fender Harman-Kardon（哈曼) Infinity Interscope JBL Kenwood (健伍) Kicker Krell Lear/Philips (李尔/飞利浦) Lexicon Mark Levinson Meridian Naim Panaray Panasonic（松下) Pioneer（先锋) Philips （飞利浦) Revel Rockford Fosgate Shaker Sony （索尼) THX Certified XBM AKG None of these [ANCHOR/EXCLUSIVE]	

Q52 Why did you choose**insert 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

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 - ¥910
3. ¥911 - ¥2275
4. ¥2276 - ¥4550
5. ¥4551 - ¥6825
6. ¥6826 - ¥9100
7. ¥9101 - ¥13650
8. ¥13651 - ¥27300
9. ¥27301 - ¥45500
10. More than ¥45500

Q54 Do you own or have ever owned a branded car audio system?
1. Currently own
2. Used to own
3. Never owned

Q55 Do you own or have ever owned any of the following branded car audio system?
Alpine (阿尔派)
Arkamys
Beats Audio
Bang & Olufsen

Blaupunkt (蓝宝)
Bose
Boston Acoustics
Bowers & Wilkins
Burmester
Canton
Clarion (歌乐)
Denon
Dimension
Dolby (杜比)
DTS
Dynaudio
ELS Surround
Fender
Harman-Kardon (哈曼)
Infinity
Interscope
JBL
Kenwood (健伍)
Kicker
Krell
Lear/Philips (李尔/飞利浦)
Lexicon
Mark Levinson
Meridian
Naim
Panaray
Panasonic (松下)
Pioneer (先锋)
Philips （飞利浦)
Revel
Rockford Fosgate
Shaker
Sony （索尼)
THX Certified
XBM
AKG
None of these [ANCHOR/EXCLUSIVE]

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

Q57 Why would you not be likely to recommend this brand to others?
I like other brands more
1. Not good quality
2. Not value for money
3. Too expensive
4. Other _____[ANCHOR] [WRITE IN]

Q58 Would you buy (insert brand from Q55) again?
1. Yes
2. No

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 _____