

Keeping Both Hands on the Wheel

Drivers show growing interest in voice-activated technologies for their vehicles

New York, N.Y. — June 15, 2010 — American drivers¹ are growing more likely to adopt voice activated technologies to use in their vehicles, according to Harris Interactive's 2010 AutoTECHCAST study, conducted between April 6, 2010 – April 26, 2010. Thirty-five percent of drivers say they would be likely to adopt voice activated controls or features in their vehicle, up from just over one-quarter (27%) in 2009. Additionally, a handful of drivers showed interest in Text to Speech and Speech to Text (TS-ST) technology, with 14% indicating they would be likely to adopt it.

This is continuing coverage from the Harris Interactive 2010 AutoTECHCAST study, an annual survey of adult vehicle owners in the United States that studies 69 advanced automotive technologies spanning across several categories that include: *Entertainment, Exterior Comfort & Convenience, Glass, Intelligent Sensing, Interior Comfort & Convenience, Lighting, Powertrain & Alternative Fuels, Ride & Handling, Safety, and Telematics.*

Voice Activated Controls

Voice activated controls and features allow vehicle occupants to use voice commands to control a variety of vehicle systems and features such as their cell phone, audio system, navigation system, climate control, and other electronic systems. Once a command is programmed, the user simply speaks the command to execute the specific function. A benefit of this technology is that it limits the amount of driving distractions in the vehicle and, consequently, can aid in the prevention of accidents. However, over half of drivers (52%) cite this technology as a comfort and convenience technology, compared to one in four (28%) who see it as a safety technology. Fewer see it as a form of entertainment (13%).

Not surprisingly, as the price of voice activated controls and features decreases, more drivers indicate their likelihood to adopt. Back in 2006 when these technologies were more expensive and the price point was set at \$750 in the study, a mere 3% indicated they would be likely to adopt this feature. Comparatively, 35% of drivers said they would be likely to adopt these controls and features in this year's study when the price was set at \$150.

Text to Speech or Speech to Text (TS-ST)

Other hands-free innovations include Text to Speech or Speech to Text (TS-ST) technologies that enable occupants to respond to text messages and emails while driving. For example, an incoming text is "read aloud" to the driver, then he or she can either speak a reply or select a pre-set reply which is then converted to text. This system allows the driver to increase productivity while minimizing driver distraction, maintaining driver safety. Approximately one in seven drivers (14%) said they would be likely to adopt this technology after a \$200 price point was given.

¹ U.S. adults ages 18 and over and who own or lease a vehicle, have a valid driver's license, have at least one household vehicle, own a vehicle model year 2005 or newer, and are at least 50 percent involved in the decision to buy their next household vehicle

David Pulaski, Vice President of Harris Interactive Automotive and Transportation Research states “In today’s fast-paced world, drivers will continue to multi-task and need a way to do it safely while driving. Automakers need to move more aggressively to bring these technologies to market. Automakers who embrace these technological advances are likely to gain incremental sales and may see gains in the way consumers view their brand.”

Similar to voice activated technologies, drivers are divided as to the main purpose this technology would serve; approximately three in ten say see TS-ST as a comfort/convenience (32%) or a safety technology (30%), while one-quarter (25%) see it as entertainment.

David Duganne, Sr. Research Director of Harris Interactive Automotive and Transportation Research states “Marketers need to be aware of these diverse perceptions as they develop these technologies and bring them to market.”

Early Adopters Lead Consideration

The study also finds there is increasing consideration for adopting voice activated technologies among those who already own other technologies such as a portable navigation system (49% who own would consider adopting voice activated technology vs. 39% who do not own), Bluetooth (47% vs. 32%), an iPod (45% vs. 30%), an MP3 player (38% vs. 25%), and all types of smartphones, including an iPhone (14% vs. 7%).

Considerers of TS-ST technologies are likely to already be connected to other technologies, as well, based on their responses before being given the market price: considerers are more likely to own a portable navigation system (52% vs. 43%), Bluetooth (50% vs. 34%), and an iPod (55% vs. 37%).

TABLE 1
LIKELIHOOD TO PURCHASE ALTERNATIVE FUEL TECHNOLOGIES

"How likely would you be to purchase this technology if it added [INSERT PRICE] to the total cost of your vehicle?"

Base: Adults who evaluated each technology

	Voice Activated Controls and Features	Text to Speech and Speech to Text
Price	\$150	\$200
Base	989	1017
	%	%
TOP 2 BOX	35	14

(NET)		
Extremely Likely	18	6
Very Likely	17	8
Likely	18	10
BOTTOM 2 Box (NET)	47	76
Somewhat Likely	23	24
Not At All Likely	24	52

(Note: Percentages may not add up to 100% due to rounding).

TABLE 2
CATEGORY OF VEHICLE TECHNOLOGY

"In which of the following categories would you consider this technology/feature to belong? Please select only one."

Base: Adults who evaluated each technology

	Voice Activated Controls and Features	Text to Speech and Speech to Text
Base	989	1017
	%	%
Comfort/Convenience	52	32
Safety	28	30
Entertainment	13	25
Performance	3	1

Styling	1	1
Environment/Efficiency	1	2
Other	2	9

(Note: Percentages may not add up to 100% due to rounding).

TABLE 3
TECHNOLOGIES / DEVICES OWNED

" Which of the following technologies/devices do you currently own? Please select all that apply."

Base: Adults who evaluated each technology

	Voice Activated Controls and Features: Consideration before exposure to market price		Text to Speech and Speech to Text: Consideration before exposure to market price	
	Extremely Likely/ Very Likely/ Likely	Somewhat Likely/ Not At All Likely	Extremely Likely/ Very Likely/ Likely	Somewhat Likely/ Not At All Likely
Base	367	622	154	863
	%	%	%	%
iPhone	16	5	16	9
Blackberry	18	11	25	10
Smart Phone	26	8	32	15
iPod	45	30	55	37
MP3 Player	38	25	35	30
Bluetooth Connectivity	47	32	50	34
Portable Navigation System	49	39	52	43
Mac	14	7	15	12

Computer				
PC Computer	86	78	73	83
Smartbook	4	1	4	1
Kindle or other eReader	10	4	9	5
iPad	4	1	2	1
None of these	3	7	4	3

Methodology

The AutoTECHCAST study was conducted online within the United States by Harris Interactive between April 6, 2010 – April 26, 2010 among 12,225 U.S. adults ages 18 and over and who own or lease a vehicle, have a valid driver’s license, have at least one household vehicle, own a vehicle model year 2005 or newer, and are at least 50 percent involved in the decision to buy their next household vehicle. Results were weighted as needed for age, gender, education, region and income and to properly represent U.S. vehicle segment owners. Propensity score weighting also was used to adjust for respondents’ propensity to be online.

About Harris Interactive

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