
New Harris Interactive AutoTECHCAST Study: All-Wheel Drive is Driving Consumer Demand on All Wheels

ROCHESTER, N.Y. – April 15, 2009 – A new Harris Interactive AutoTECHCAST study finds that one-third of adult vehicle owners would consider purchasing all-wheel drive (AWD) technology on their next new vehicle, not taking into account estimated market prices. This ranks AWD second in consideration among 67 unique technologies measured in the 2009 AutoTECHCAST study, and it is a 10% point increase over the last time AWD was studied back in November, 2006.

Luxury vehicle owners, both car and SUV, show the most interest in AWD with close to half indicating they would consider it. Two in five (41%) entry SUV and mid/large SUV owners would also consider the technology. Surprisingly, nearly two in five (37%) mid-size car owners indicate they are likely to consider AWD, making a strong statement to OEMs that this type of technology not only is a selling point for trucks and SUVs, but cars as well.

The new Harris Interactive 2009 AutoTECHCAST study, an annual survey of adult vehicle owners in the United States includes “All-Wheel Drive”, as well as 66 other unique 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.*

While AWD is perhaps not the newest and most advanced vehicle technology studied, it is certainly one of the most impactful. In addition to ranking second in consideration, it is the top technology, at 68% that if added at no additional cost would make respondents either more likely (28%) or much more likely (40%) to consider a vehicle with the technology over a vehicle without it, assuming all else were the same.

All-Wheel Drive’s Appeal

AWD has strong benefits for both performance and safety, with half of those who evaluated the technology indicating they would categorize it as a performance technology, and 43% categorizing it is a safety technology. Of those at least likely to consider the technology, the top reasons for consideration were enhanced safety (39%), followed by improved handling (30%). The ability to drive in situations you normally wouldn’t drive in was also mentioned by a quarter (26%) of considerers. Drivers with AWD find it important with slightly more than three in five (61%) indicating it is extremely important or very important to have it on their vehicle.

As vehicle buyers are downgrading to smaller vehicles, they are demanding the technologies they became accustomed to, especially those that provide a higher level of performance and safety benefits. AWD is a technology that as our data and real-world sales data suggest can definitely have an impact on a consumer’s vehicle purchase decision. Carol Gstalder, Senior Vice President of Harris Interactive Automotive and Transportation Research Practice states, “Technologies like AWD that promote the

benefits of safety are extremely important to people. To consumers, the benefits of safety translate to key emotional outcomes that drive consumer decision making – such as confidence that the vehicle is durable and can avoid or withstand a crash, keeping families safe, and enhancing peace of mind.”

TABLE 1
LIKELIHOOD TO PURCHASE ALL-WHEEL DRIVE

“How likely would you be to purchase this technology on your next new vehicle?”

Base: Adults who evaluated “All-wheel Drive” technology

	Total (2008)	Total (2006)
Base	1,057	1,257
	%	%
TOP 2 BOX (NET)	33	23
Extremely likely	16	9
Very likely	18	14
Likely	22	18
BOTTOM 2 BOX (NET)	44	59
Somewhat likely	31	31
Not at all likely	14	29

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

TABLE 2
LIKELIHOOD TO PURCHASE ALL-WHEEL DRIVE: BY VEHICLE OWNER SEGMENT
 “How likely would you be to purchase this technology on your next new vehicle?”

Base: Adults who evaluated “All-wheel Drive” technology

	Compact Car	Midsize Car	Compact Pickup	Light/Heavy Duty Pickup
Base	105	108	83	105
	%	%	%	%
TOP 2 BOX (NET)	20	37	28	24
Extremely likely	9	17	14	5
Very likely	11	20	14	19
Likely	23	19	10	30
BOTTOM 2 BOX (NET)	57	44	61	45
Somewhat likely	46	28	34	32
Not at all likely	11	16	27	14

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

Base: Adults who evaluated “All-wheel Drive” technology

	Entry SUV	Mid/Large SUV	Compact van	Full-size car
Base	105	103	104	108
	%	%	%	%
TOP 2 BOX (NET)	41	41	27	31
Extremely likely	20	15	13	22
Very likely	22	26	14	9
Likely	20	25	24	18
BOTTOM 2 BOX (NET)	39	34	49	51
Somewhat likely	27	19	32	42
Not at all likely	12	15	17	9

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

Base: Adults who evaluated “All-wheel Drive” technology

	Sports Car	Luxury Car	Luxury SUV
Base	52	103	77
	%	%	%
TOP 2 BOX (NET)	26	48	49
Extremely likely	10	27	37
Very likely	15	21	13
Likely	49	22	23
BOTTOM 2 BOX (NET)	25	31	27
Somewhat likely	20	23	21
Not at all likely	6	8	7

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

**TABLE 3
DIFFERENTIATION OF ALL-WHEEL DRIVE**

“If this technology were to be added to a new vehicle, but would not increase the cost, how likely would you be to purchase the vehicle over competitor vehicles?”

Base: Adults who evaluated “All-wheel Drive” technology

	Total
Base	1,057
	%
TOP 2 BOX (NET)	68
Much more likely	40
More likely	28
BOTTOM 2 BOX (NET)	32
Slightly more likely	18
No more likely	14

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

**TABLE 4
CATEGORIZATION OF ALL-WHEEL DRIVE**

“In which of the following categories would you consider this technology/feature to be in?”

Base: Adults who evaluated “All-wheel Drive” technology

	Total
Base	1,057
	%
Performance	50
Safety	43
Environmental/efficiency	3
Comfort/convenience	3
Others	1

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

**TABLE 5
REASONS FOR CONSIDERING ALL-WHEEL DRIVE**

“You indicated you are likely to include All-Wheel Drive on your next vehicle. In your opinion, which of the following is the most important benefit of All-Wheel Drive?”

Base: Those at least likely to consider “All-wheel Drive” technology

	Total
Base	1,057
	%
Enhanced safety	39
Improved handling	30
Ability to drive in situations you normally wouldn't drive in	26
Increased performance	4
Other	1

(Note: Multiple Responses Accepted).

TABLE 6
IMPORTANCE OF ALL-WHEEL DRIVE IN CURRENT VEHICLE
 “How important is All-Wheel Drive in your current vehicle?”

Base: Own a vehicle with All-wheel drive

	Total
Base	294
	%
TOP 2 BOX (NET)	61
Extremely important	26
Very important	35
Important	21
BOTTOM 2 BOX (NET)	18
Somewhat important	14
Not at all important	4

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

Methodology

The AutoTECHCAST study was conducted online within the United States by Harris Interactive between February 9, 2009 and February 24, 2009 among 12,622 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 listed North American model – 2004 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.

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