FREDERICKpolls

POLL RESULTS

U.S. DRIVERS' BEHAVIORS AND OPINIONS REGARDING TIRE CHARACTERISTICS IN TIRE PURCHASE DECISION MAKING

June 2005

Methodology

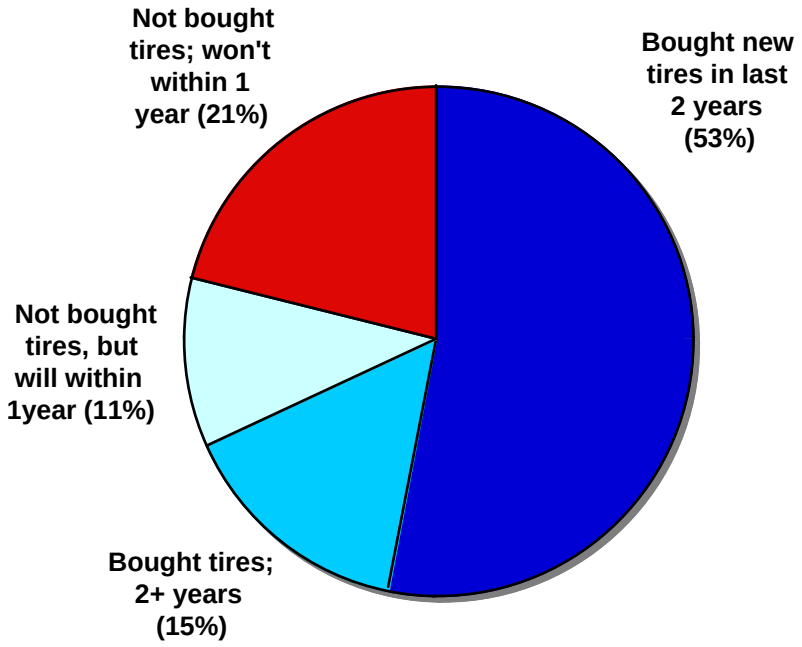
- Total Sample Size: n=800
- Eligibility: Adult Drivers and Vehicle Owners
- Interview Dates: June 1-7, 2005
- Client: Rubber Manufacturers Association
- Margin of Error: Plus or minus 3.5% at the 95% confidence level

2101 Wilson Blvd., Suite 104
Arlington, VA 22201
(703) 528-3031 (p) (703) 528-1204 (f)
Keith@FrederickPolls.com

I. Recent Tire Purchase Behavior.

A 53% majority of U.S. drivers have purchased new tires for the vehicle they drive most frequently within the last two years. Another 15% have also purchased new tires for their vehicle but have doe so prior to two years ago.

Tire Purchase Landscape
(for Vehicle Regularly Driven)



This 68% of drivers who have purchased new tires is balanced by 11% who have not bought new tires but plan to do so within the next year plus 21% who have not, and are not, in the market for new tires.

The 53% “purchasers” load up slightly higher in the West (58%) than the South (49%); higher among younger-aged drivers (59% among those aged under 40) than older drivers (45% among those aged 60+); and higher among rural residents (61%) than small town residents (47%).

The following chart details specific characteristics of the new tire purchase among the 68% who have bought new tires for their vehicle (58% within the last two years plus 15% over two years ago).

Specific Characteristics of New Tire Purchase
(Among 68% who purchased new tires)

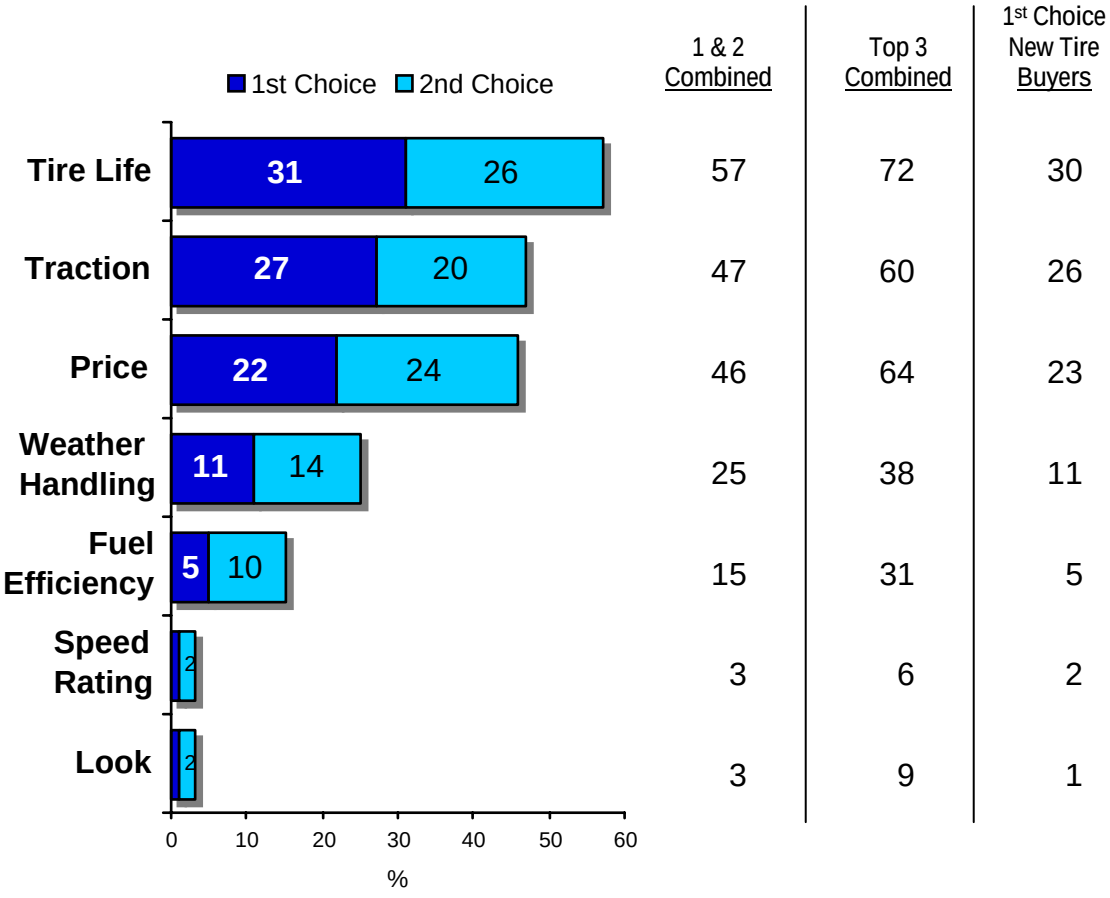
- 45% replaced original vehicle tires.
- 7% bought snow tires specific for winter driving.
- 72% bought a full four-tire set; another 21% bought a replacement pair.
- 83% volunteered the reason for tire replacement as a simple “old ones wore out.”
- 27% replaced their tire with an exact same make and modest as was previously on their vehicle; 68% said “some other factor” was involved in the decision.

II. New Tire Decision Factors.

When asked to pick from seven options for the most important factor in deciding which tire to purchase, "tire life" and "traction" are top choices. In all, 58% pick one of these two factors.

Fuel efficiency scores fifth on the list with only 5% picking it as the most important purchase decision factor, 15% picking fuel efficiency as one of the top two most important factors, and just 31% picking it as one of the top three factors.

Most Important Factor in New Tire Purchase Decision



	1 & 2 Combined	Top 3 Combined	1st Choice New Tire Buyers
Tire Life	57	72	30
Traction	47	60	26
Price	46	64	23
Weather Handling	25	38	11
Fuel Efficiency	15	31	5
Speed Rating	3	6	2
Look	3	9	1

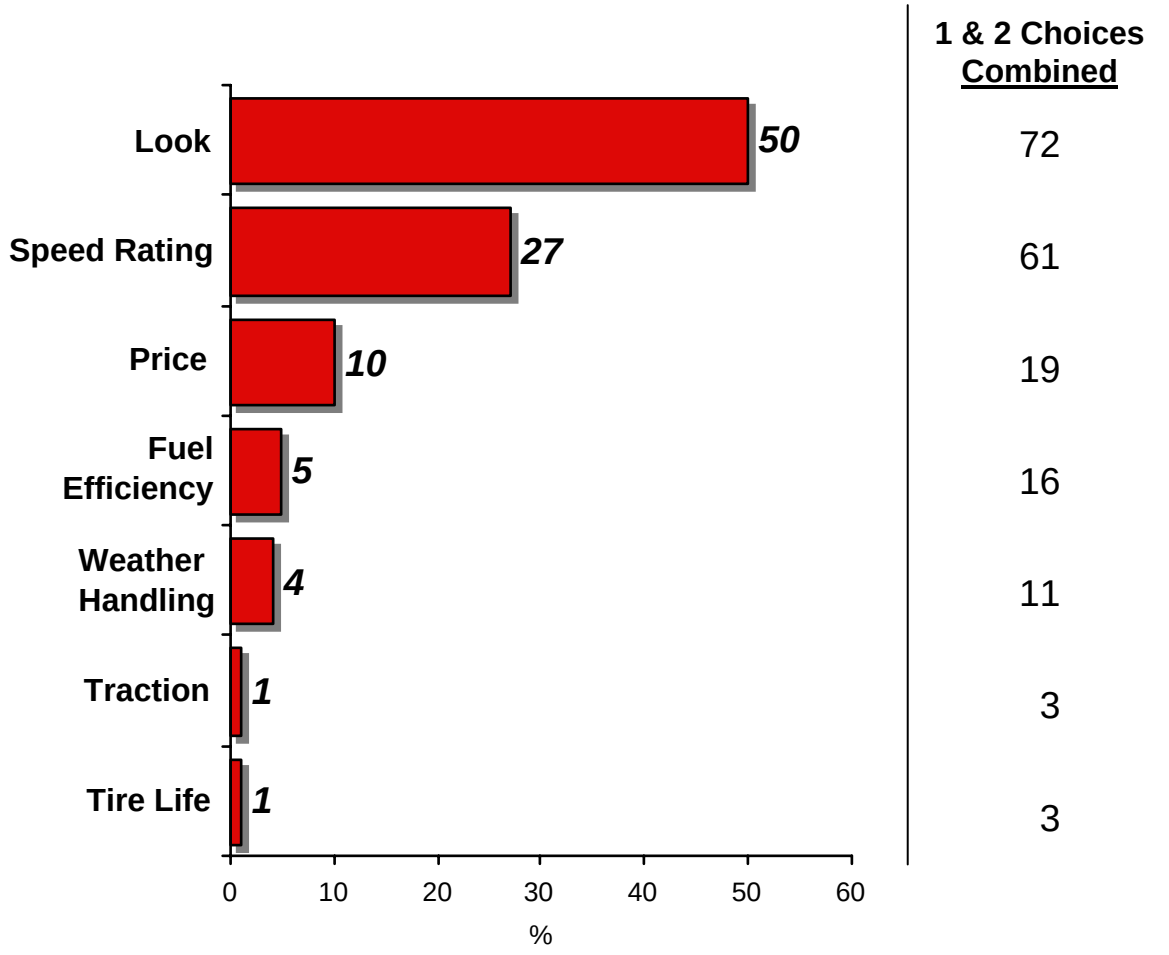
At 15%, the ranking for “fuel efficiency” as one of the top two choices scores well below “tire life” (57%), “traction” (47%), or “price” (46%) and even fairly far behind “weather handling” (25%).

Thus, even with gas prices well established at or above the $2.00 per gallon level throughout much of the country, the percent picking fuel efficiency as the most important tire purchase criteria never exceeds the 7% level for any group. Rural residents top the chart at 7% first choice (15% first plus second).

Fuel efficiency leads only “speed rating” (1%) and “look of tires on the vehicle” (1%) as the most important tire purchase decision.

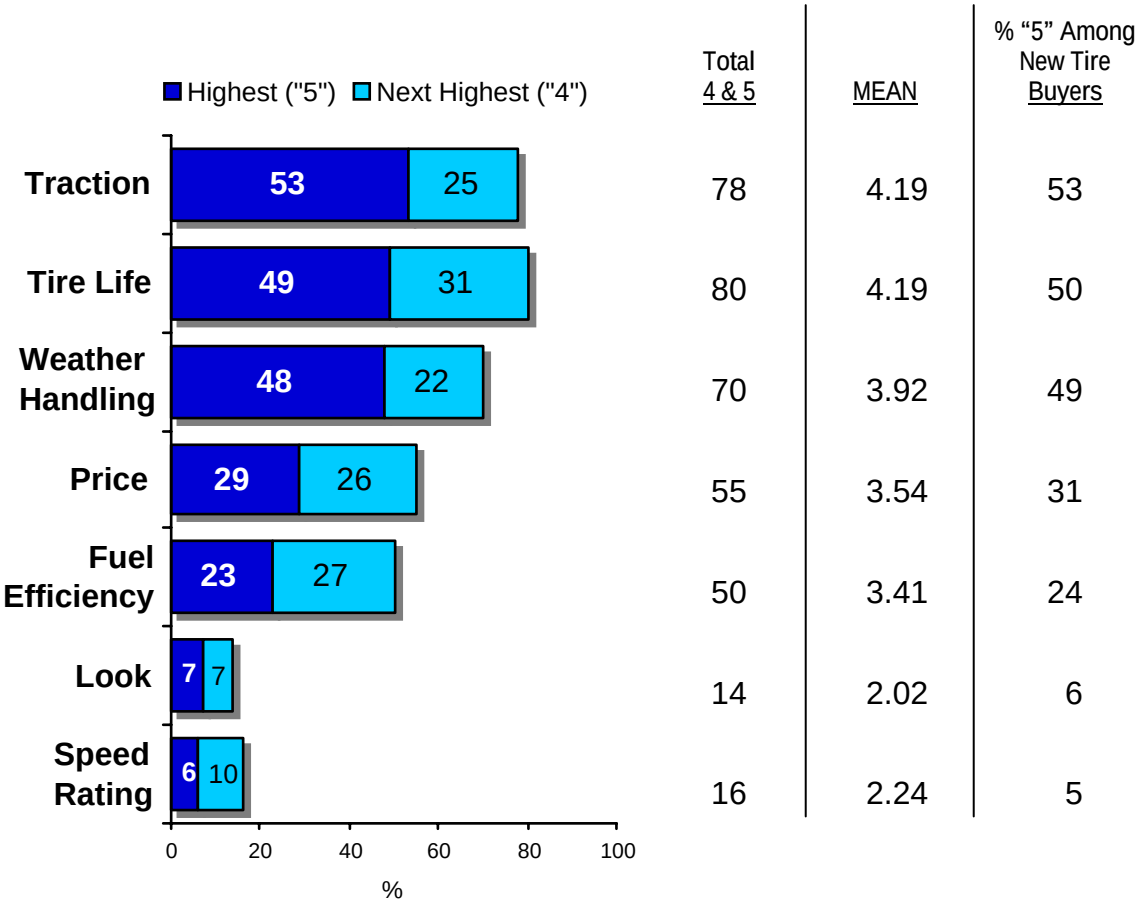
As expected, the chart flips when drivers are asked to pick the “least most important” factor in a new tire purchase. Tire “look” (50%) leads as least important followed by “speed rating” and “price.” Fuel efficiency is picked by 5% as least important.

Least Important Factor in New Tire Purchase Decision



When given the chance to individually rank each of the seven tire purchase factors, the same rank ordering of factors by importance emerges. Half of U.S. drivers rate "fuel efficiency" as either a "4" or "5" on a 1-to-5 importance rating scale. The other half of drivers – even when given a direct choice to do so – do not feel fuel efficiency is an important factor at all in the new tire purchase choice decision.

Tire Purchase Decision Factors Individually Rated
(1 to 5 scale; 1 = Lowest; 5 = Highest Importance)



	Total 4 & 5	MEAN	% "5" Among New Tire Buyers
Traction	78	4.19	53
Tire Life	80	4.19	50
Weather Handling	70	3.92	49
Price	55	3.54	31
Fuel Efficiency	50	3.41	24
Look	14	2.02	6
Speed Rating	16	2.24	5

Again, "traction" and "tire life" score highest. About four-out-of-five drivers rate these as important tire purchase decision criteria; half pick each as highest importance.

"Weather handling" scores nearly as high as traction and tire life – close to a "4" mean score.

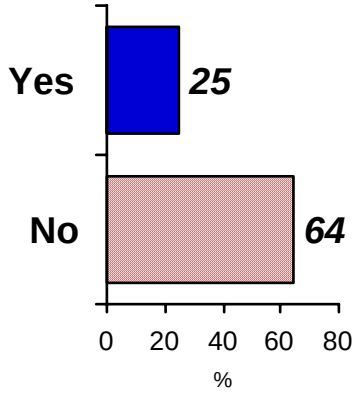
III. Lower Roll Resistance Tires.

Just 25% of U.S. drivers say they would purchase lower roll tires even if those tires lasted a shorter period of time; 64% would not purchase lower roll resistance tires.

Importance of "Lower Rolling Resistance" Tires

Some tires are engineered to have "lower rolling resistance" which helps slightly improve a vehicle's gas mileage. But, some experts say such "lower rolling resistance" tires wear out faster and need to be replaced more often than other tires commonly in use today.

Knowing this, would you purchase tires that helped improve your vehicle's gas mileage even if they did not last as long?



	-Purchase Tires			-Region-				-Gender-	
	Last 2 yrs %	Before 2 yrs %	Next year %	NE %	MW %	South %	West %	M %	F %
Yes	26	23	27	33	19	25	25	26	24
No	65	62	70	56	67	66	66	65	64

The level of interest in such fuel-efficient times is about the same – around one quarter of drivers – among the three categories of recent, less recent, and near future tire buyers.

Interest in these tires bumps up a bit in the Northeast but drops in the Midwest.

IV. Uniform Tire Quality Rating System.

About half of U.S. drivers say they are aware of the Uniform Tire Quality Rating System. Among those aware of it, slightly more say it influences the kind of tires they purchase. In all, 29% of U.S. drivers are aware of the Uniform Tire Quality Rating System and utilize it to purchase tires.

Men are higher than women.

Role of Uniform Tire Quality Rating System in Tire Purchase Decision

Are you aware or unaware that all tires are labeled with a federal government-mandated Uniform Tire Quality grading system providing information about that tire's traction, tread wear, and temperature resistance?

IF YES: Does this rating system influence your decision of which tire to buy?