PTIA

POLISH TYRE INDUSTRY ASSOCIATION

REPORT

Public opinion survey: awareness of impact of tyres on safe driving and environmental protection

Millward Brown

A study for the Polish Tyre Industry Association (PTIA)

October 2013

INTRODUCTION

When we set up the Polish Tyre Industry Association (PTIA) few months ago, we knew that one of our goals is to make drivers aware of how important tyres are for safety on our roads. Yet we had no empirical proof of what this awareness is like. Which is why the first task after the setting up of the PTIA was to conduct such a study.

If we focus on the consumer side of the tyre business and ask a typical car driver, the tyre is still too often that piece of rubber on the wheel that is hardly ever associated with high-tech or perceived as a crucial element of safety. Years of education of the users by the tyre related professionals did bring a much better awareness about tyre contribution but still there are opinions that a tyre is simply there to roll and that it makes no special contribution to the quality of driving. Of course such opinion evolves, sometimes too late, when some user is faced with harsh road or winter conditions. Also more safety conscious drivers like sport pilots or bikers do not underestimate what the tyre can bring to them but they remain a minority.

Our study shows that most Poles do not appreciate the significance of tyres in everyday practice, are hardly familiar with their proper use, and don't know how they influence the safety and cost of driving. And yet when we drive a car or ride a motorbike, our health and life depend on the adhesion of the tyre to the ground, and so does the driving experience. Whatever the class of the car, the entire engine power and the force of braking systems are transmitted to a post-card-size part of the tyre. This is why tyre quality has such a large impact on the quality of driving.

In our study, we also wanted to learn, what Poles know about tyre labelling and investigate their environmental awareness as related to used tyres. The results presented below prove that the mission of the PTIA, namely improving the tyre awareness among drivers, is well defined.

Armand Dahi
President

Piotr Sarnecki
Director General

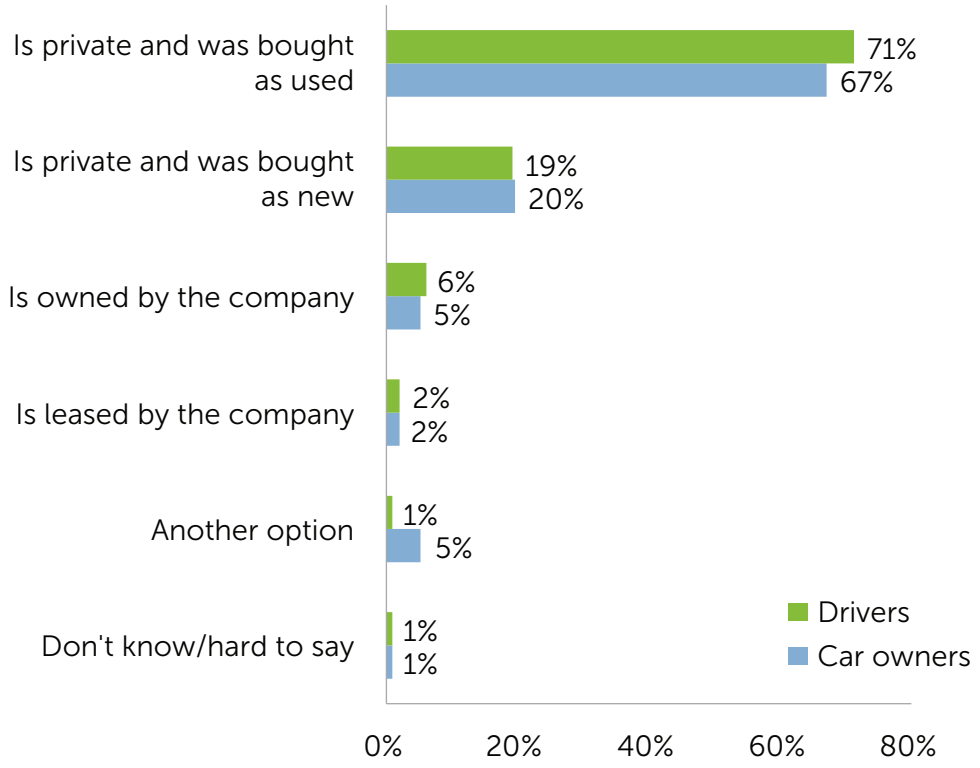
GENERAL CONCLUSIONS

In their daily experience, Poles underestimate the significance of tyres and are hardly aware of their proper use and impact on handling, safety and cost:

- **32%** of respondents rank tyres third among crucial parts that influences driving safety. Among the drivers this is even higher – **39%**.
- The significance of tyres is even higher among the **39%** of drivers, who rank tyres second in key part to be exchanged.
- Drivers are aware that summer tyres should be used in summer and winter tyres in winter – **92%** change their tyres seasonally, and another **6%** use all-year-round 4 season tyres. The most frequent motivation for not exchanging tyres is infrequent use of the car in winter.
- **33%** of drivers know that winter tyres should be mounted as soon as temperature drops below 7°C.
- But only **39%** of respondents test their tyre pressures when filling up their tank, servicing their car or exchanging the tyres. The respondents usually seek information about correct tyre pressure first at the place where they exchange the tyres, at service or tyre refitting station.
- **41%** of the respondents know, that too low pressure in tyres result in compromising driver's control of the vehicle, **21%** realise, that this results in faster wearing of tyres, and **17%** understand, that it also results in higher fuel consumption.
- **72%** of the respondents know, that a tyre is not fit for further use if its thread is too shallow.
- In most cases drivers leave used up tyres at service station, less frequently they leave them in the shop were the new tyres are bought. The respondents are aware that used tyres should be left for recycling at a special place, only **3%** throw the tyres to a rubbish bin. It is a testimony of a fairly high level of environmental awareness of Poles.
- Only **one in ten** respondents knows about the new European rule requiring to stick labels on tyres, with standardized information about wet grip, fuel efficiency and noise emission. A majority cannot answer the question when asked, which 3 information a label must contain.

STATUS OF THE VEHICLE

Please state whether the main vehicle you use:



A majority of the vehicles used (more than two in three) are private cars that were bought second-hand, every fifth vehicle was new when bought.

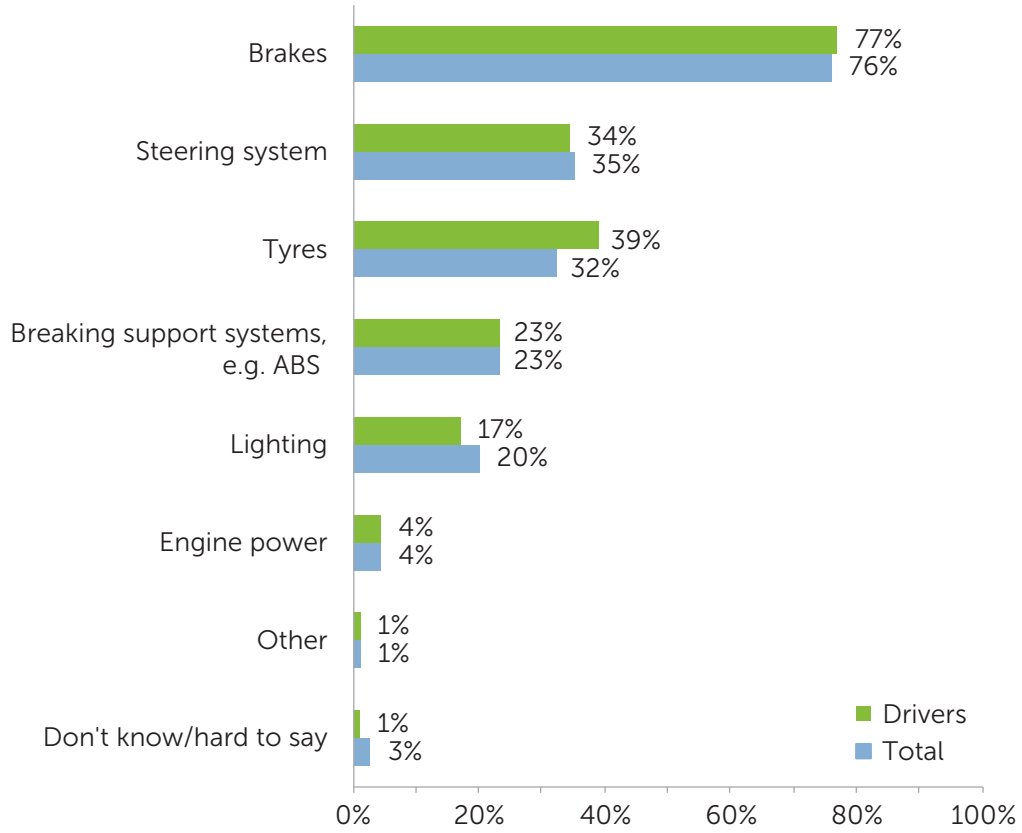
Altogether, fewer than 10% of the respondents were using company cars.

No significant differences were observed between drivers and not driving respondents.

N=640

VEHICLE COMPONENTS RESPONSIBLE FOR SAFETY

I will now read out a list of vehicle components. Please say which of them you believe to be responsible for driving safety most. (Maximum 2 answers.)

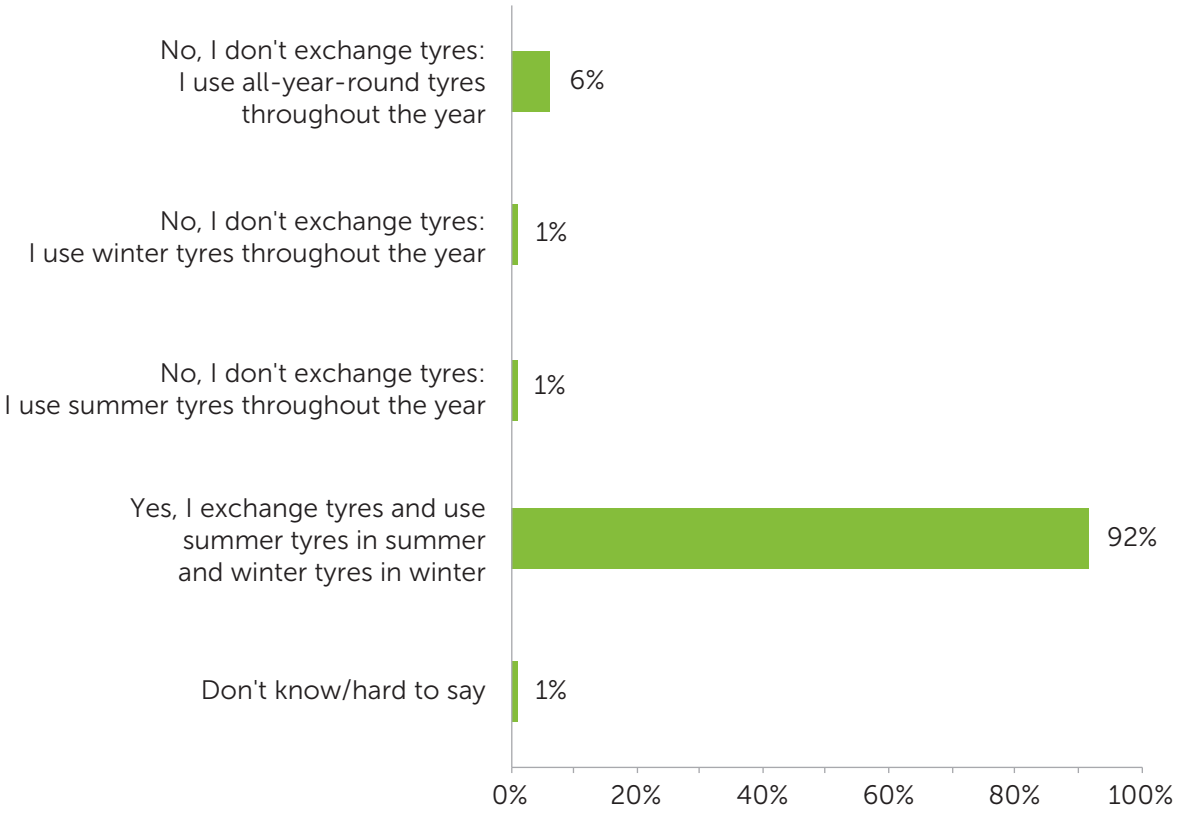


76% of respondents believe, that the brakes are the component that has the greatest impact on driving safety. Ranked below brakes were steering system (35%) and tyres (32%), with awareness of tyre significance being higher among drivers (39%). Every fourth person mentioned support systems, and every fifth – lighting.

N=1000
N=548

RE-TYRING

Do you exchange tyres in your car and use summer tyres in summer and winter tyres in winter?



92% of the drivers declare exchanging their tyres during the year and using summer tyres in summer, and winter tyres in winter.

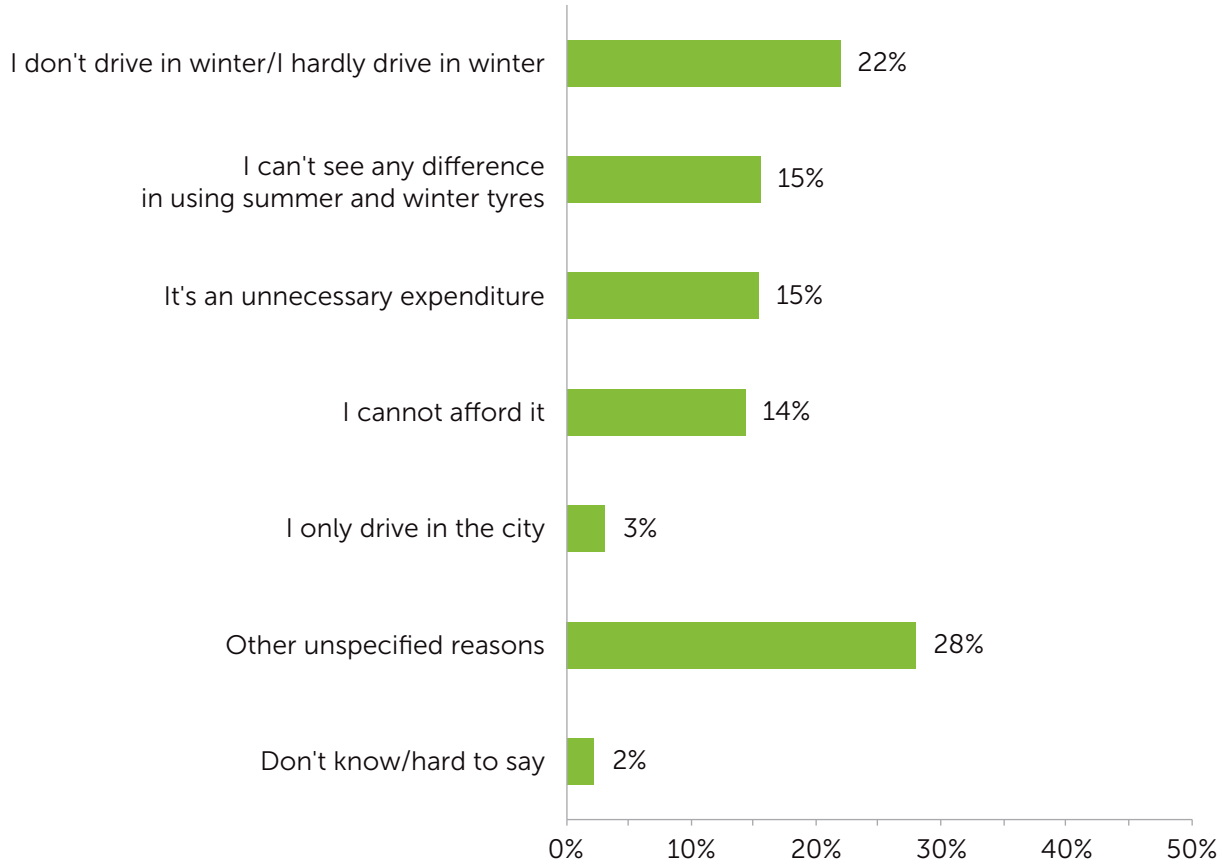
6% of the drivers use all-year 4 season tyres.

2% of the drivers don’t exchange tyres.

N=548

REASONS FOR NOT CHANGING TYRES

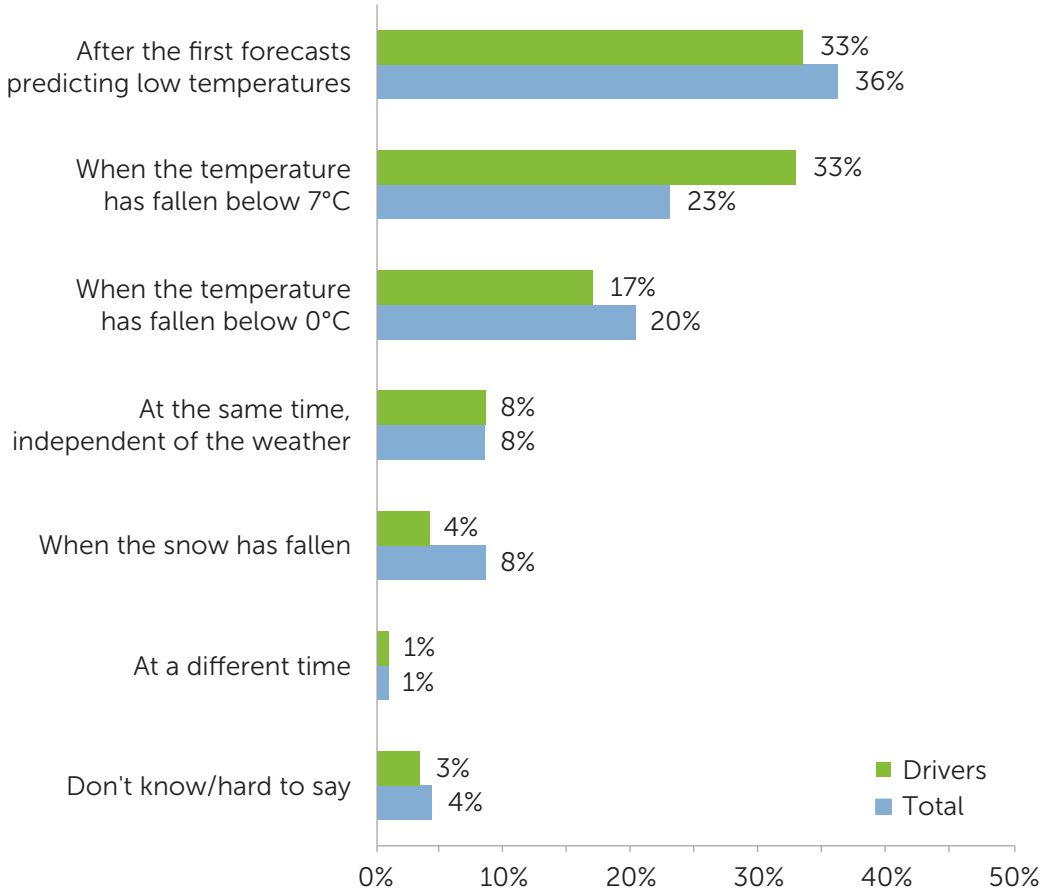
Why don't you switch to winter tyres?
Please state the most important reason.



When asked why they don't exchange tyres, drivers usually respond that they don't drive in winter, that they see no difference in using summer and winter tyres, and also that such an exchange is an unnecessary expenditure.

WHEN TO FIT WINTER TYRES?

Do you know when you should switch to winter tyres?

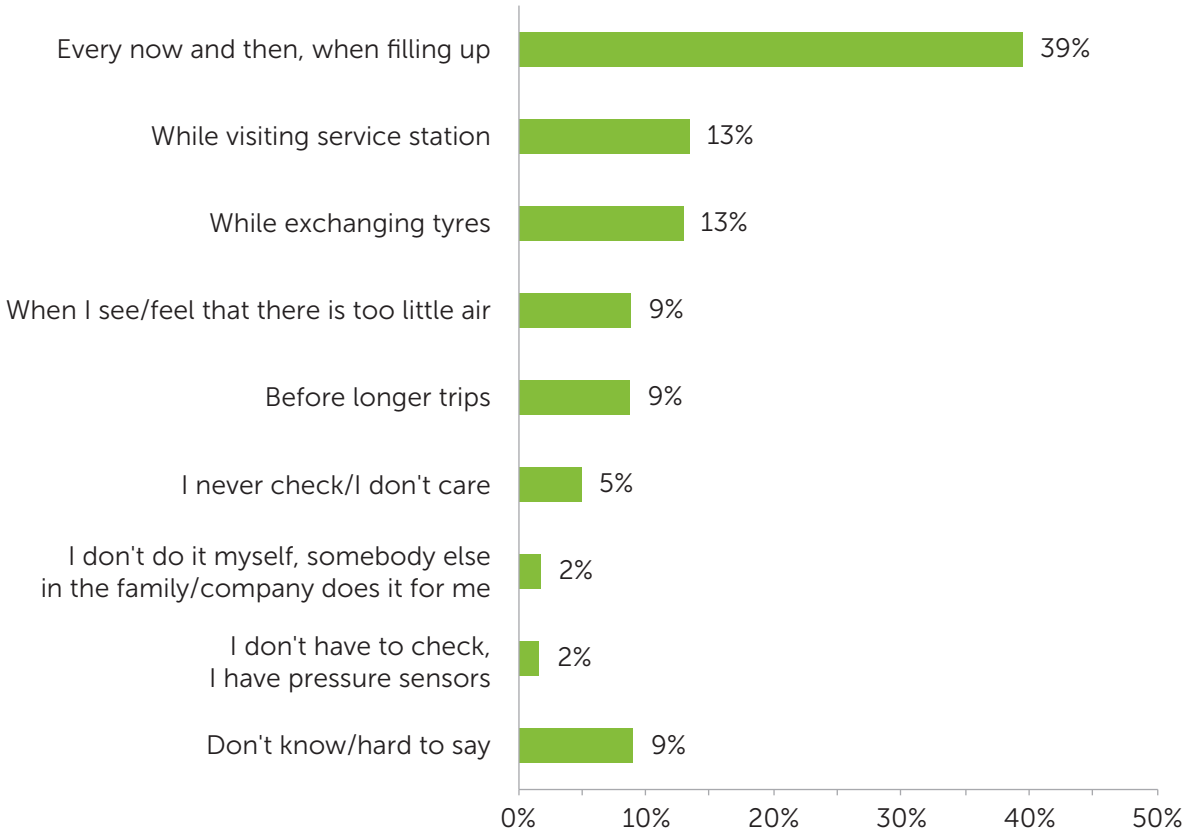


Every third respondent believes winter tyres should be fitted when low temperatures are first predicted. 23% believe (as recommended by producers) that it is time to exchange tyres when the temperature drops below 7°C (the ratio is significantly higher among drivers – 33%). Every fifth respondent wrongly believes that tyres should not be exchanged until the temperature drops below 0°C (proportion among drivers: 17%).

N=1000
N=548

PRESSURE CONTROL FREQUENCY

How often do you control pressure in your car tyres?



Only 39% of drivers test wheel pressure while filling up (from time to time). 13% mention doing it while visiting service station, and the same proportion – while exchanging tyres; 9% reported doing it before a longer trip.

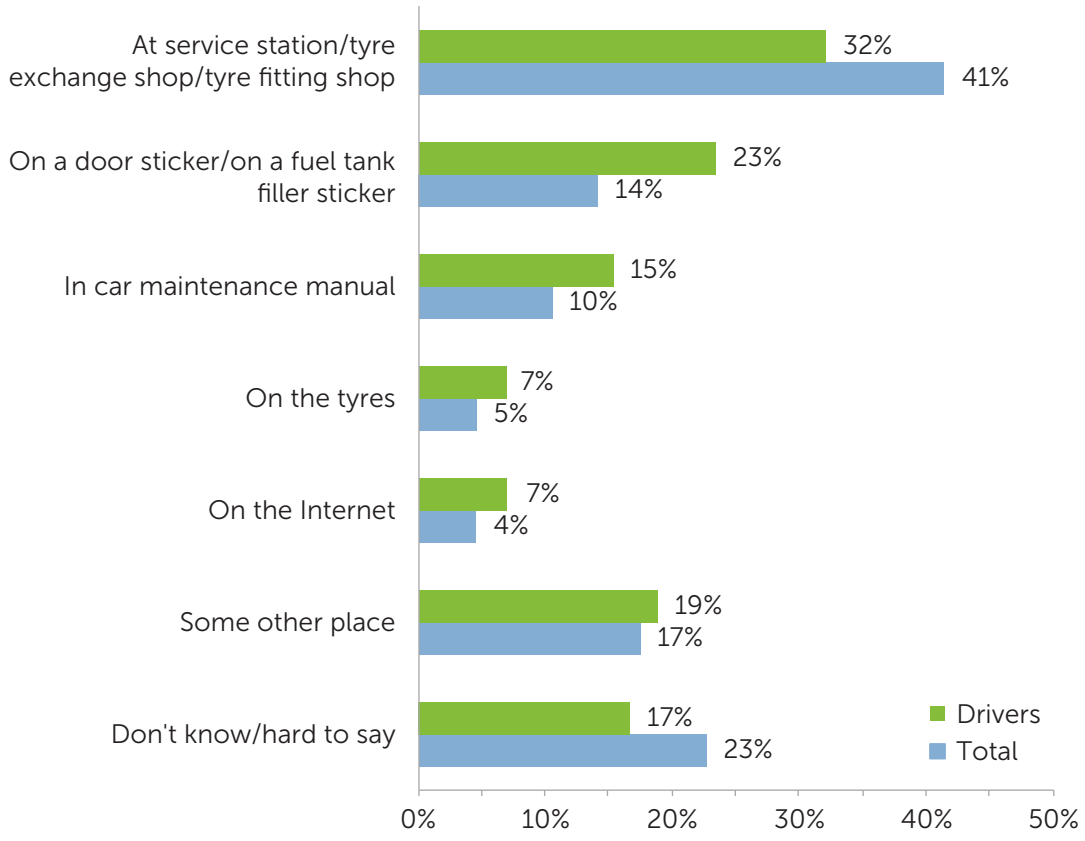
Every tenth driver checks the pressure only when they feel that *"there is little air"*, and 5% don't do it at all!

We believe that introducing obligatory tyre pressure monitoring sensors in EU will improve the ratios, and drivers will be more aware of how to care properly for correct pressure.

N=548

CORRECT TYRE PRESSURE

Do you know where you can check tyre pressure and what the correct pressure in specific tyres in a specific car is?



Respondents usually look for information about correct tyre pressure at the place where they exchange tyres, service stations, and tyre fitting shops (altogether 41%), while drivers far more often mention the labels on doors and/or fuel tank fillers and car maintenance manual.

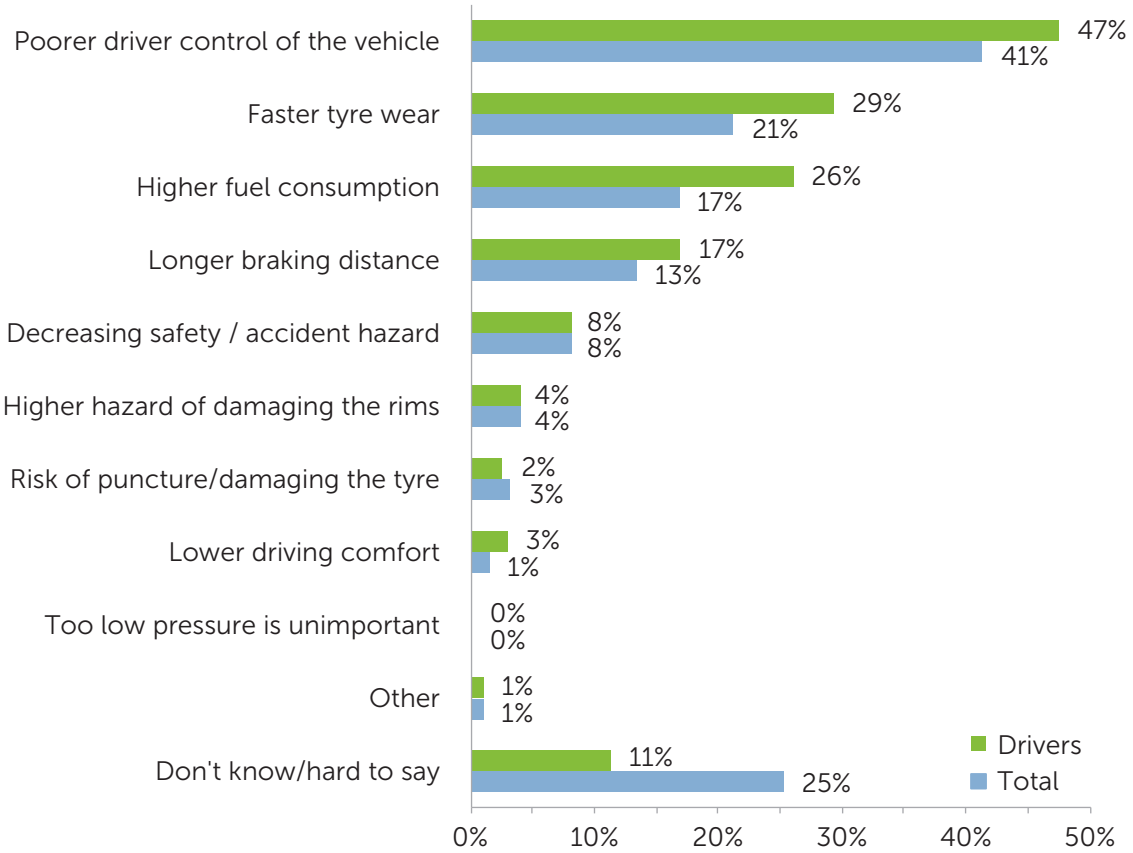
Unfortunately, if as many as 32% of drivers seek information about correct pressure at service station, this may mean that they don't check the pressure regularly.

Every fourth respondent cannot indicate the places were such information can be found.

N=1000
N=548

WHEN TYRE PRESSURE IS TOO LOW...

What is the impact of too low tyre pressure on driving?



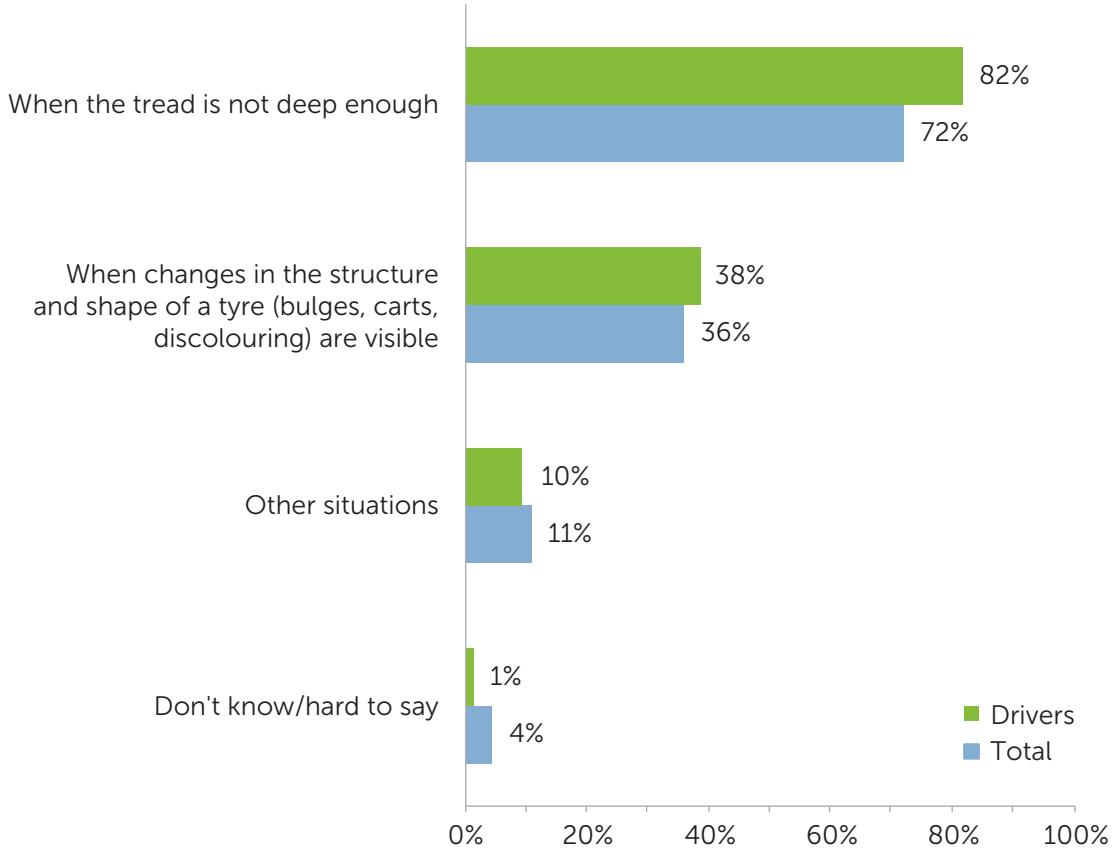
Awareness of the consequences of too low tyre pressure is moderate: respondents report that it results in poorer driver control of the vehicle (41%), faster tyre wear (21%), higher fuel consumption (17%), and longer braking distance (13%).

For each hazard mentioned above, the awareness of the danger is higher by a few percentage points in the case of drivers. It is on the contact area of the tyre with the road, an area the size of the postcard, that our health and life depend, independent of the class of the vehicle.

N=1000
N=548

TYRE WEAR

In your opinion, when is a tyre no longer fit for use?



The respondents are highly aware of tyre wear. 72% realise that a tyre is not fit for further use when the tread is too shallow (82% in the case of drivers).

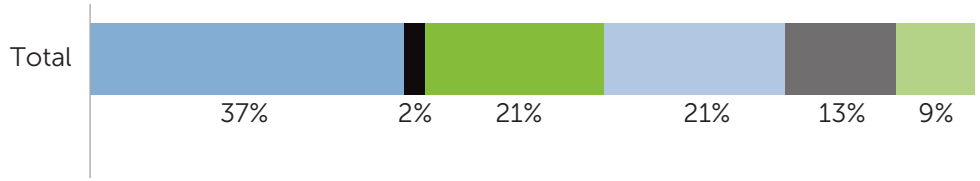
Moreover, every third respondent knows that they cannot use a tyre with visible changes in its structure and/or shape.

The law requires car tyres to have a minimum tread depth of 1.6 mm. Yet the recommended depth for winter tyres is 4 mm, so that the tyre retains its properties.

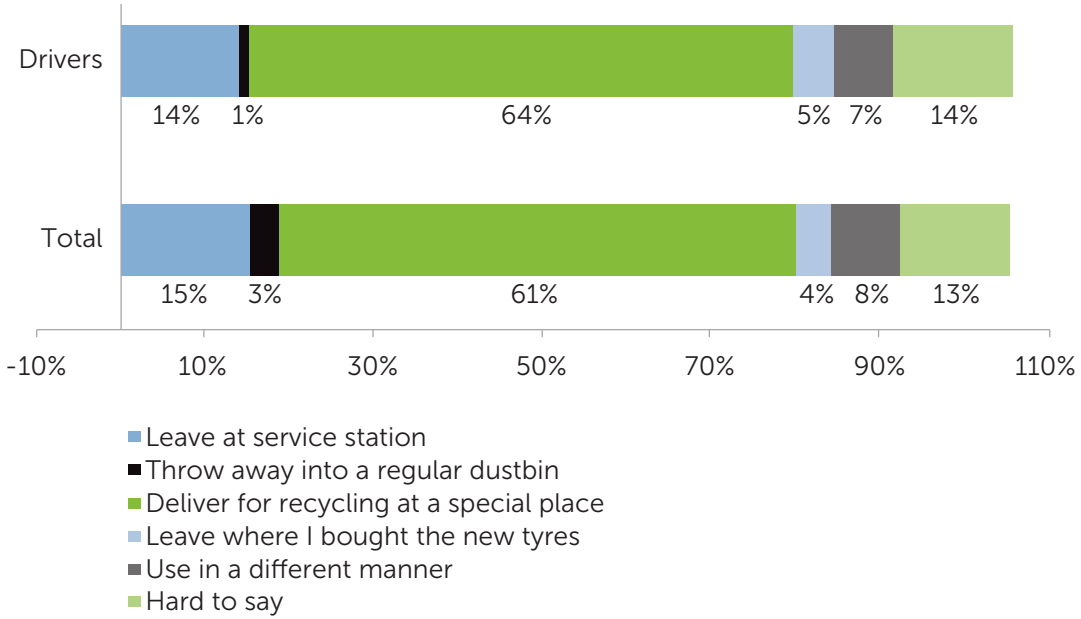
N=1000
N=548

WHAT TO DO WITH USED TYRES

What do you do with a used tyre?



And what should be done with a used tyre?



As a rule, drivers leave used tyres at service station. They are less likely to deliver them for recycling or leave in the shop where they buy new ones. Environmental awareness is fairly high, with only 2% throwing used tyres into regular dustbins.

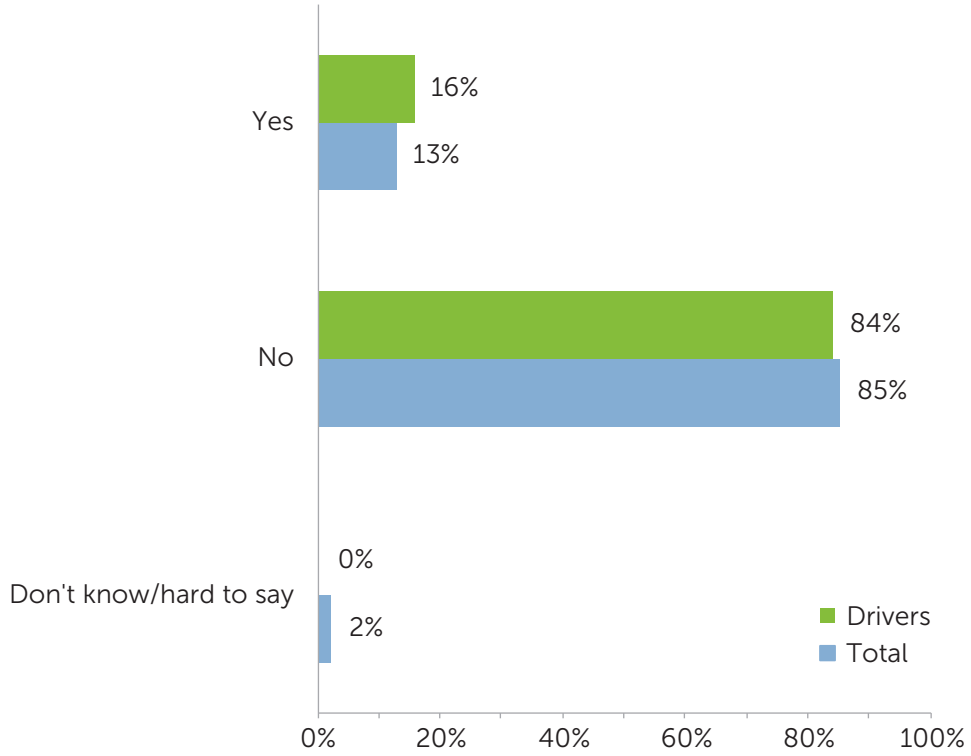
At the same time, most (nearly 2 in 3) respondents believe that used tyres should be left for recycling at a special place.

Driver awareness does not diverge from the mean value for the entire population.

N=1000
N=548

TYRE INFORMATION LABELS

Do you know that European Union introduced the obligation to provide tyres with information labels in November 2012?



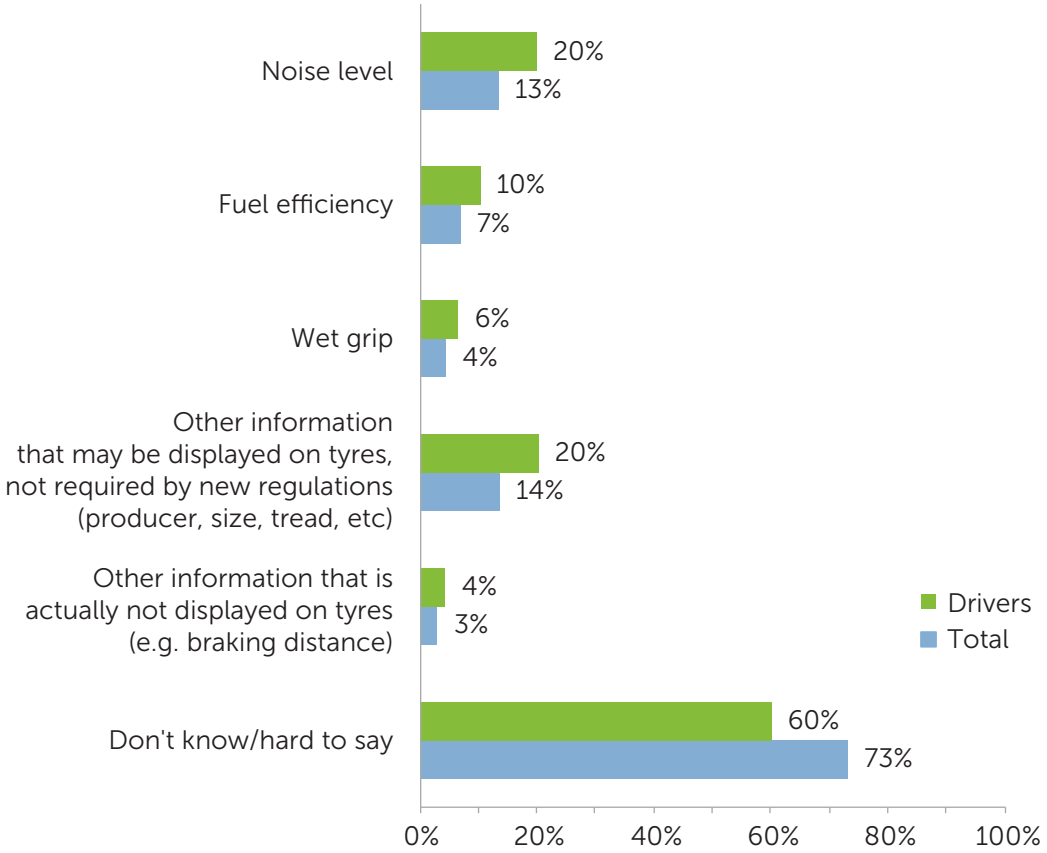
Only 13% of the respondents are aware of the obligation to place additional new information on the tyres. The ratio is hardly higher among the drivers.

Producer labelling was introduced in November 2012. The label shows information about fuel efficiency, wet grip, and noise pollution.

N=1000
N=548

ESSENTIAL TYRE INFORMATION ON LABELS

Do you know what tyre information is quoted on information labels?



No fewer than 73% of the respondents cannot name what information must be provided on labels (60% of the drivers).

People who know about the obligation to provide new information on the tyres usually mention noise level (13%), fuel efficiency (10%), and grip (4%). Awareness is slightly higher among drivers.

N=1000
N=548

METHODOLOGY

Objective of the study: To become familiar with the general opinion on the impact of the tyres on safety and environmental protection.

Study method: CATI (Computer Assisted Telephone Interviewing) based telephone interview.

Sample: The interviews were conducted on a representative national sample (N=1000) of Poles aged 18 and above. A subsample of drivers (N=548) was selected from the main sample (drivers are defined as driving licence holders using the car at least once a month).

Randomly generated landline and mobile telephone numbers (50/50) were used for the study.

Selection of proper layers for the sample, accounting for the demographic features of the respondents and their place of residence (based on the Polish Central Statistical Office data) guarantee the representative character of the results obtained.

The sample was stratified for: sex (2), age (5), education (4), town size class (9), and administrative region (16). The same parameters were included in the post-stratification weighting of the data. Taken additionally into account while weighting was the fact of having a driving licence. The weighting was iterative (RIM-weighting).

Average effective interview time: 7.8 minute.

Time of the study: The study was conducted from the 27th of September to the 9th of October 2013.

METHODOLOGY: DETAILED INFORMATION (1)

Commissioning party: Polish Tyre Industry Association (Polski Związek Przemysłu Oponiarskiego)

Research agency conducting the study: MillwardBrown SA

The research project was conducted in line with international standards

Project objective: To become familiar with the opinion of general population 18+ on the significance of tyres for driving safety and environmental awareness concerning tyres

Population description: General Polish population, 18+, layered for sex, age, education, town size classes, and administrative region

Sample size: effective sample of N=1000

Time of field study: the 27th of September to the 9th of October 2013

Sample and respondent selection method: Random quota sample, landline/mobile telephone mix

Data acquisition method: CATI

Response rate: The study response rate amounted to 7.9%. Response (return) rate is the ratio between the number of the interviews completed and the sample size, from which the number of nonqualifying cases (i.e. ones in whose case there is a certainty or a justified suspicion that they do not exist or do not belong to the population studied) is subtracted.

Respondent remuneration method: N/A

Number of field investigators working on the project: 104

The course of the study (CATI) is directly monitored by a group of experienced supervisors. Supervisor duties include real-time control of field investigator work during the session, i.e. monitoring of the interviews, observation of the correct course (content and form) of the session, following statistics in individual projects, following investigators statistics, and also real-time pickup on potential mistakes and reacting to irregular situations. The session investigator to supervisor ratio was 15:1. Supervisors are obliged to control at least 5% of the sample, which is reported in the control summary report for each of the projects conducted. Control of an individual case covers at least 75% of the total interview time. While controlling an individual case, the supervisor conducting the assessment is obliged to conduct investigator verification in specific areas: voice, articulation and enunciation, speed of delivery, precision and understanding of content, involvement, freedom of expression, contact with the respondent (follow-up questions, passive listening), and correct recording of the answers.

METHODOLOGY: DETAILED INFORMATION (2)

Materials used for the study: Questionnaires, materials presented to the respondents during the interview (e.g. visual sheets, illustrations, etc.) and other materials related to data collection (e.g. audio and video files, etc): N/A

Data weighting: The study resorted to post-stratification weighting to account for territorial distribution (town size classes), and the distributions of sex, age (5 cohorts) and education (4 cohorts). The weighting was of iterative type (RIM-weighting).

Procedure for get assignment and estimation: N/A

Information about study result precision: The maximum error for the random quota sample N=1000 used in the study amounts to 3.2%.

Some results presented other data for the driver subgroup, with the subgroup size of N=548.

ADDITIONAL INFORMATION (conforming to ISO 20252 standard)

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