

**POLL RESULTS
AMONG
ADULT DRIVERS
NATIONWIDE AND THE WESTERN US
ABOUT TIRE MAINTENANCE BEHAVIORS
AND OPINIONS**

FEBRUARY 2003

Methodology

- Total Sample Size: n=2,350
- Eligibility: Adult Drivers and Vehicle Owners
- Interview Dates: January 30-February 6, 2003
- Client: Rubber Manufacturers Association
- Sample Design and Margin of Error:

<u>Area</u>	<u>Sample Size</u>	<u>Margin of Error</u>
California	n=600	4.0
Oregon	n=400	4.9
Washington	n=300	5.6
Colorado	n=350	5.2
Rest of U.S.	n=700	3.7
TOTAL	n=2,350	2.0

I. Tire Maintenance Behaviors.

American drivers report an upsurge in tire maintenance awareness since one year ago.

Now, more American drivers are regularly performing all tire maintenance procedures including...

- Checking tire pressure within the last month (+5);
- Checking tire tread for wear in the last month (+7);
- Rotating tires within the last 8,000 miles (+9); and
- Aligning wheels within the last 6 months (+7).

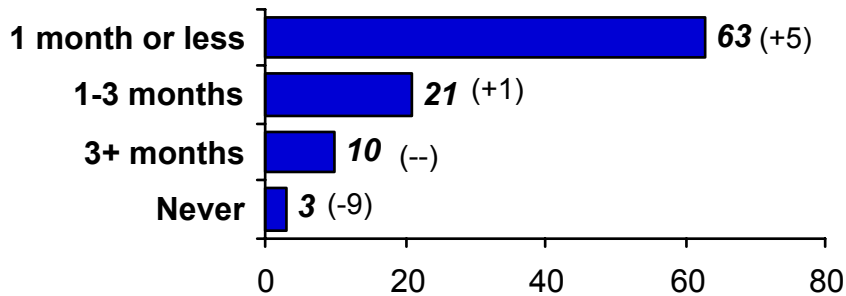
For all of these four tire maintenance behaviors, the percentage reporting “never” conducting these behaviors is down significantly.

Still, despite the gains in tire safety awareness, significant proportions of U.S. drivers still have NOT...

- Checked tire pressure within the last month (37%);
- Checked tire tread for wear within the last month (49%);
- Not rotated tires in the last 8,000 miles (43%) including 28% who never have rotated their tires; or
- Not aligned their wheels in the last six months (56%) including 24% who have never done so.

**Tire Maintenance Behaviors: Last Time Each Performed
(Volunteered Responses)**

Checked Tire Pressure (trend vs. 2002)

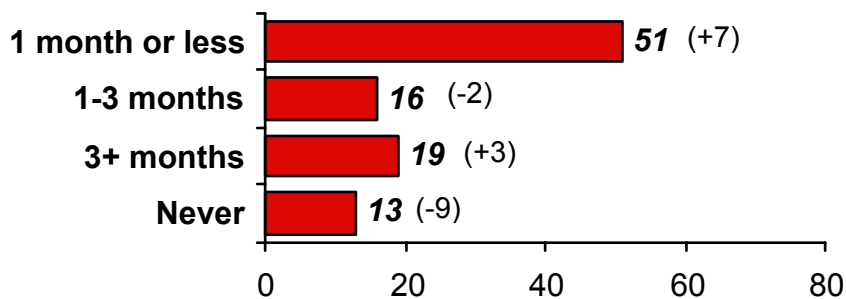


Trend
2002
US Total
%

-Western States-

	<u>CA</u> %	<u>OR</u> %	<u>WA</u> %	<u>CO</u> %
1 month or less	61	59	60	60
1-3 months	21	21	21	24
3+ months	13	12	16	9
Never	4	5	4	5

Checked Tire Tread (trend vs. 2002)



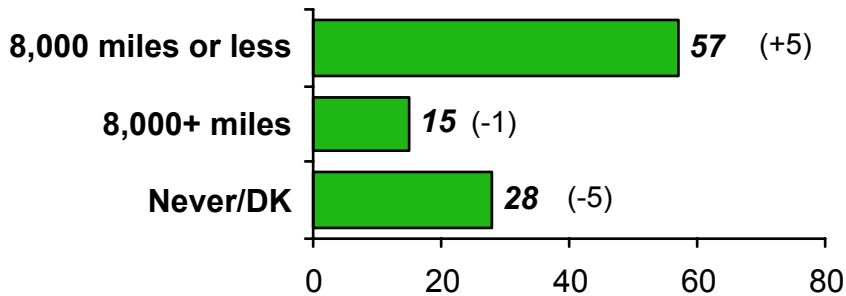
Trend
2002
US Total
%

-Western States-

	<u>CA</u> %	<u>OR</u> %	<u>WA</u> %	<u>CO</u> %
1 month or less	59	54	54	61
1-3 months	15	16	18	14
3+ months	15	19	17	15
Never	10	11	11	10

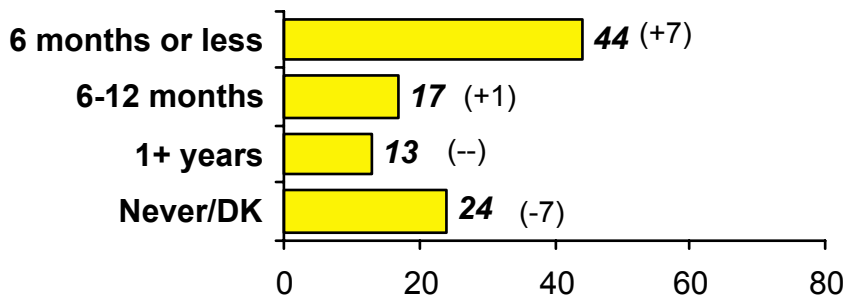
Tire Maintenance Behaviors: Last Time Each Performed
(Volunteered Responses)

Rotated Tires (trend vs. 2002)



Trend 2002 US Total %	-Western States-			
	CA %	OR %	WA %	CO %
48	62	63	55	62
16	20	16	22	14
33	25	20	25	25

Aligned Wheels (trend vs. 2002)



Trend 2002 US Total %	-Western States-			
	CA %	OR %	WA %	CO %
37	49	44	42	46
16	14	20	19	16
13	17	15	14	14
31	20	21	26	23

Checking Tire Pressure.

Just under two-thirds of U.S. drivers (63%) say they have checked their tires' pressure within the last month. In the four oversampled Western states, percentages are two to four points lower.

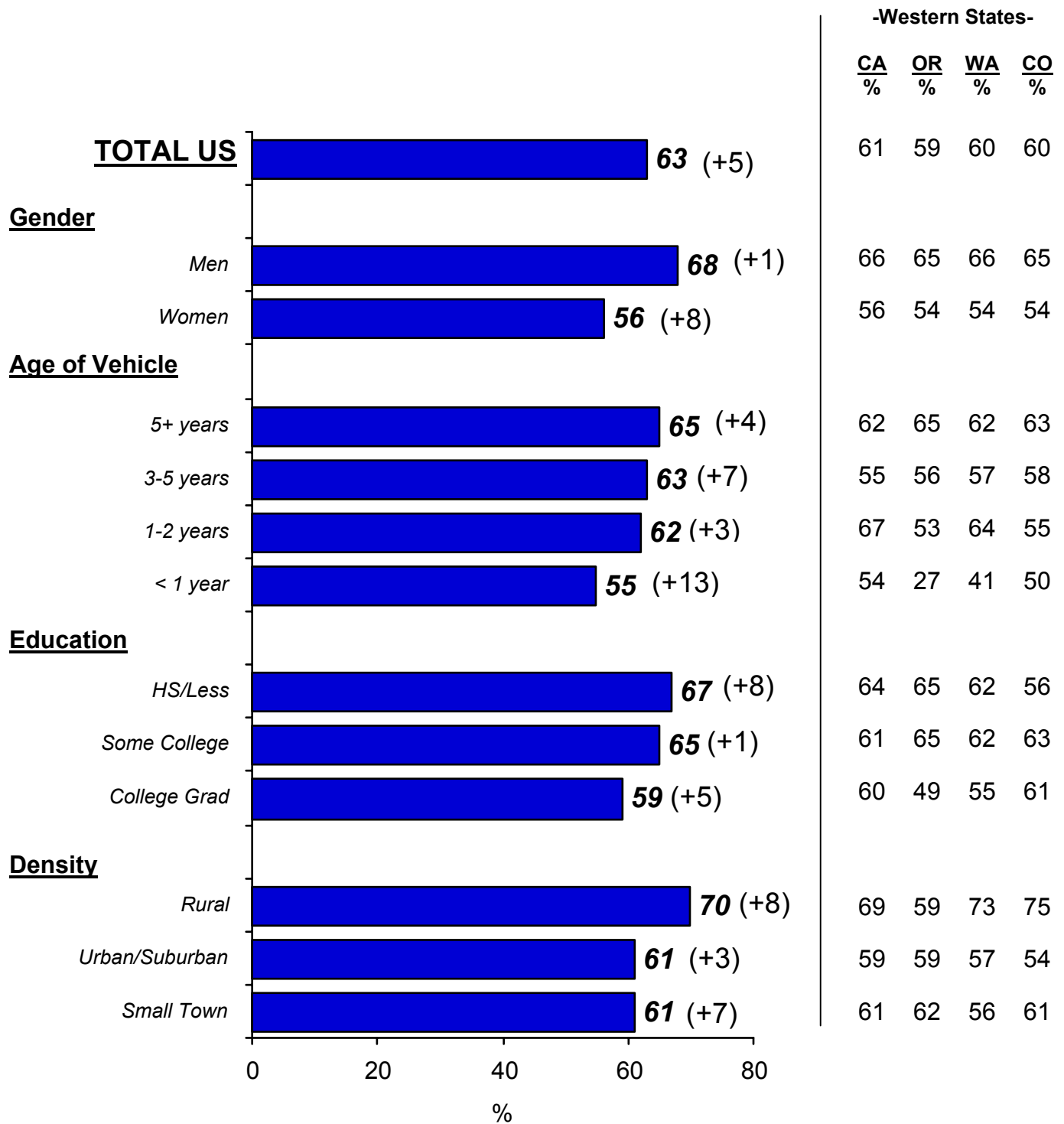
Among all U.S. drivers, men (68%) continue to be more likely to have recently checked tire pressure than are women (56%) but the trend in women recently checking tire pressure is up the most (+8).

By vehicle age, those with newest vehicles are least likely to have checked tire pressure within the last month (55%); those with oldest vehicles are most likely (65% among those with vehicles over 5 years old).

Also, college educated drivers are less likely to have recently checked tire pressure than are those with no college education (59% vs. 67%) and those in rural areas (71%) are more recent frequent checkers than residents in more densely populated areas (61%).

Age of driver is not a factor in recent checking of tire pressure but type of vehicle driven is a factor; truck owners (73%) are more likely to have checked tire pressure within the last month than car (61%) or van/SUV owners (60%).

Tire Pressure Breakout (Trend vs. 2002)
 (% Volunteering They Checked Tire Pressure Within Last Month)



Checking Tire Tread.

As with tire pressure, men (59%) are more likely than women (44%) to have checked their tires' tread wear within the last month ... but the gap is narrowing since women are +11 on this since last year.

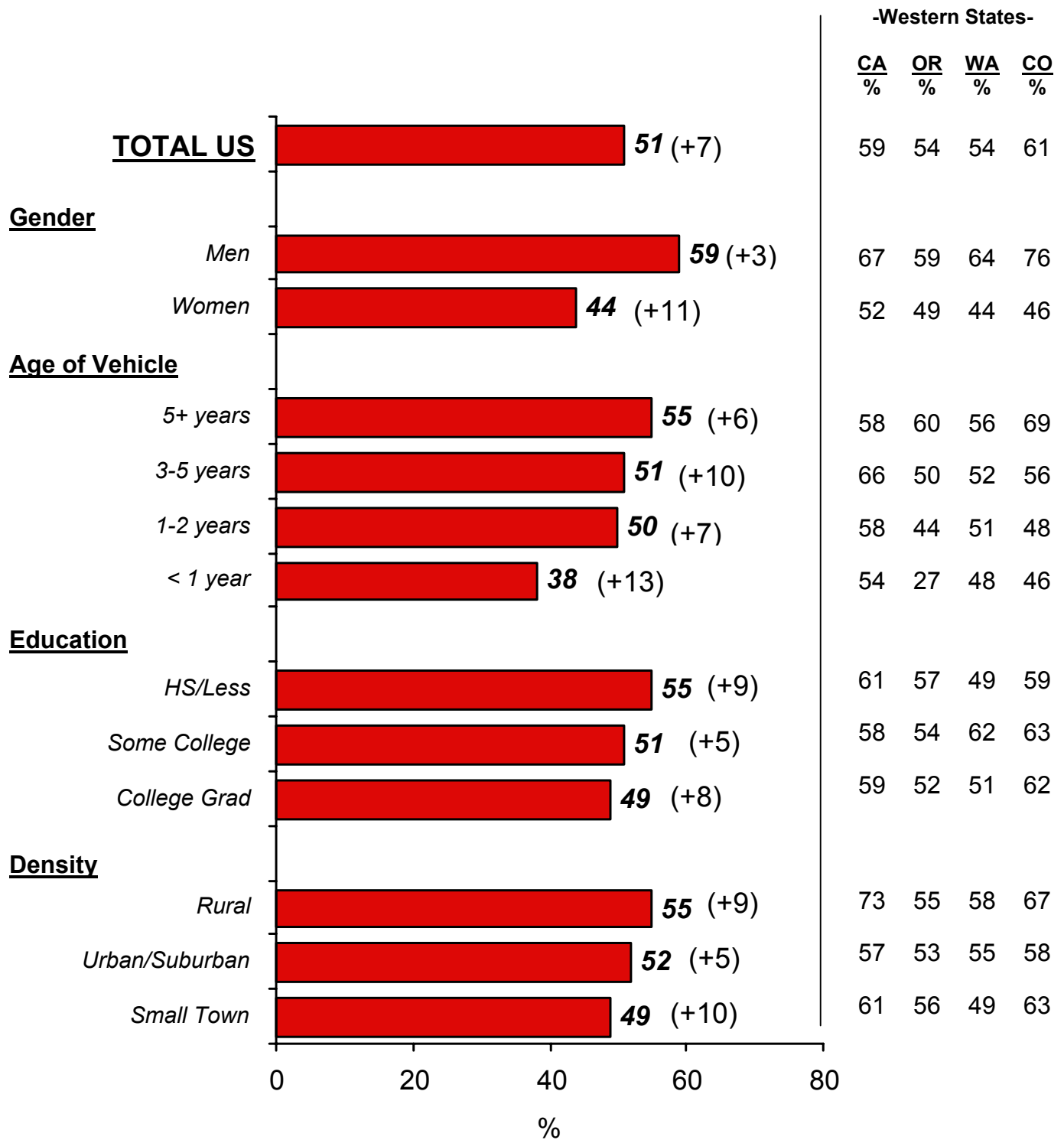
The "gender gap" on recent checking of tread wear appears more pronounced in Colorado (30 points) than Oregon. Overall, recent tire tread checking is higher in California (59%) and Colorado (61%) than the national average.

Similar to reporting of recent tire pressure checking, recent tread wear checking is highest among U.S. drivers with...

- Older vehicles;
- Least formal education; and
- Rural residences.

Also, truck owners (63%) are more likely recent tread wear checkers than other drivers and by age, older drivers are slightly less likely to have checked tread wear within the last month.

Checked Tire Tread (Trend vs. 2002)
 (% Volunteering They Checked Tire Tread Within Last Month)



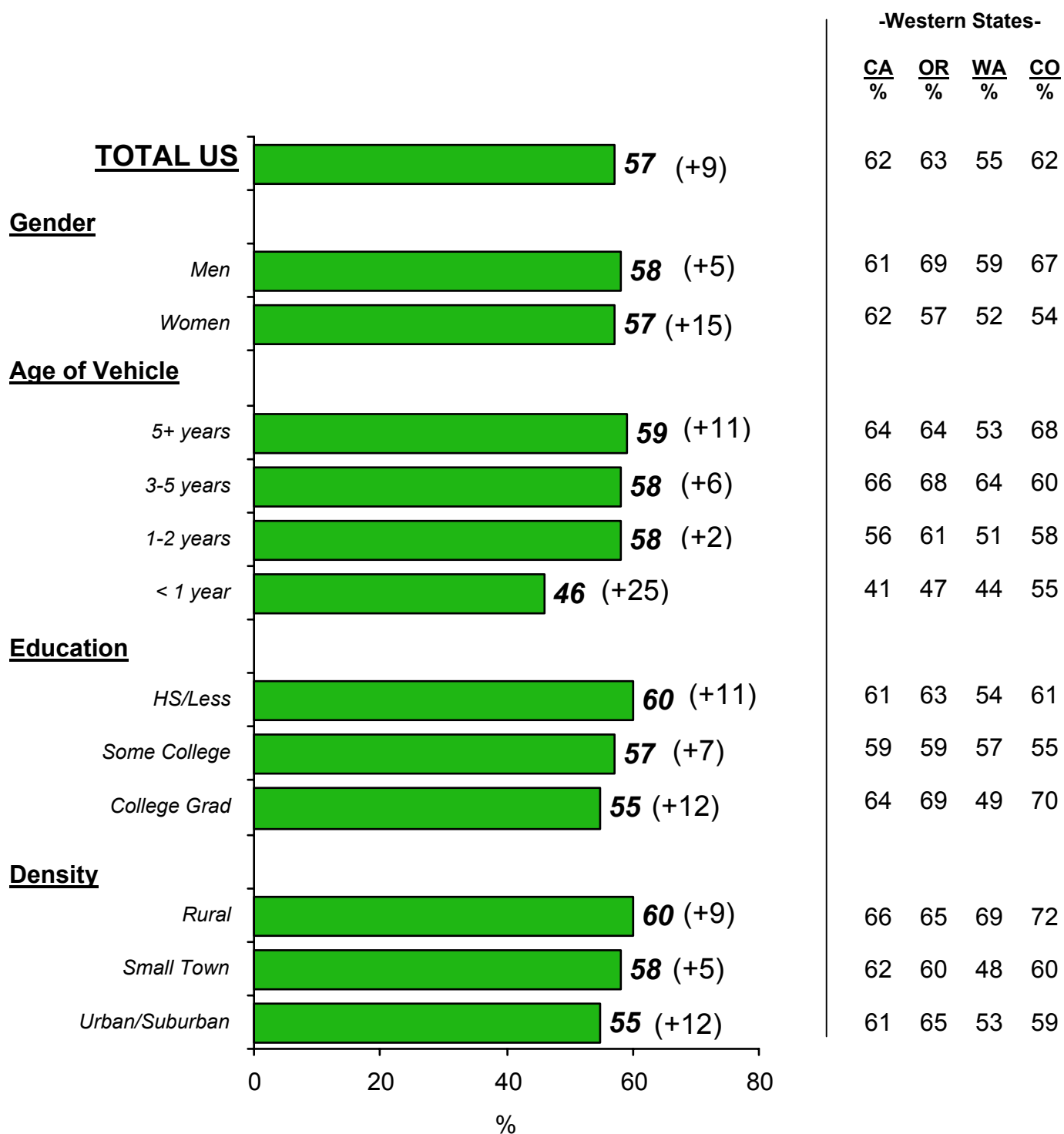
Rotated Tires.

The U.S. driver average of having rotated tires within the last 8,000 miles of use is 57%; up 9 points from 2002. The previous “gender gap” in rotation of 10 points has disappeared nationally; women drivers are now as likely as men drivers to have recently rotated tires. Gender gaps over 10 points still exist in Colorado and Oregon ... but not California, where women are as likely as men to have recently rotated their tires.

Vehicle age (with the exception of newest vehicles), education level, and population density have virtually no association with recent tire rotation.

Moreover, U.S. drivers in all age categories and vehicle types are equally likely to have rotated their tires within the recommended 8,000 mile window.

Rotated Tires (Trend vs. 2002)
 (% Volunteering They Rotated Tires in Last 8,000 Miles or Less)



Wheel Alignment.

Now, 44% of U.S. drivers report having aligned their wheels in the last 6 months; up 7 points since 2002.

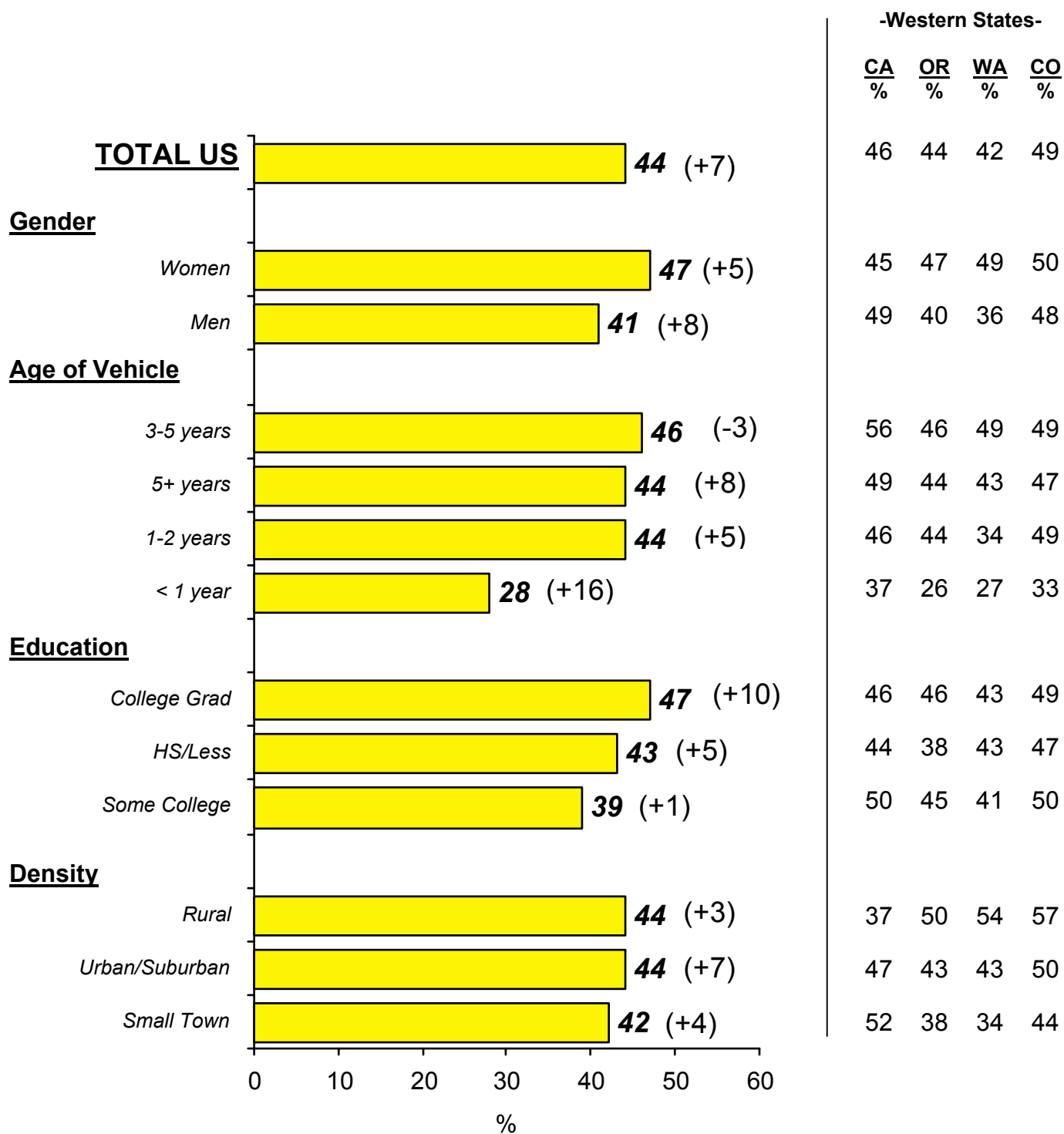
California drivers appear to be slightly more likely to have recently aligned their wheels than drivers elsewhere.

Across the U.S., newest vehicle drivers (28%) are least likely to have recently performed an alignment.

On this tire maintenance behavior, women (47%) are more likely to have aligned their wheels recently than are men (41%).

Alignment is also more likely to have been performed recently by drivers who are under 40 (54%) or van/SUV drivers (50%).

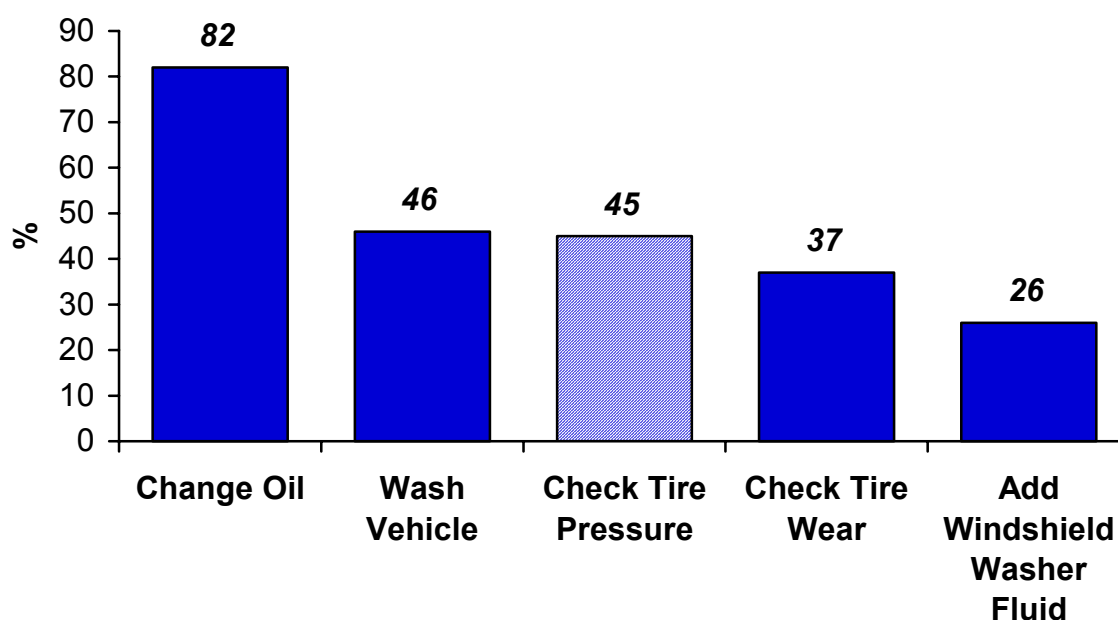
Aligned Wheels (Trend vs. 2002)
 (% Volunteering They Aligned Wheels in Last 6 Months or Less)



II. Vehicle Maintenance Behaviors.

As many U.S. drivers regularly check their tire pressure (habitually check once a month or less) as regularly wash their vehicle (multiple times per month). Both of these trail regularly changing oil (every 5,000 miles or less) as the most commonly performed vehicle maintenance behaviors.

Various Vehicle “Maintenance Behaviors” – Most Frequent*
(U.S. Total)



-
- * Change Oil: “Every 5,000 miles or less”
 Tire Pressure: “Once a month or more”
 Wash: “Multiple times a month”
 Tire Wear: “Once a month or more”
 Windshield Washer Fluid: “Add once a month or more”

Regular monthly checking of tire wear (37%) trails just behind regular monthly checking of tire pressure (43%), both ahead of regular windshield fluid changing (26%).

Habitual and regular monthly tire pressure checking is...

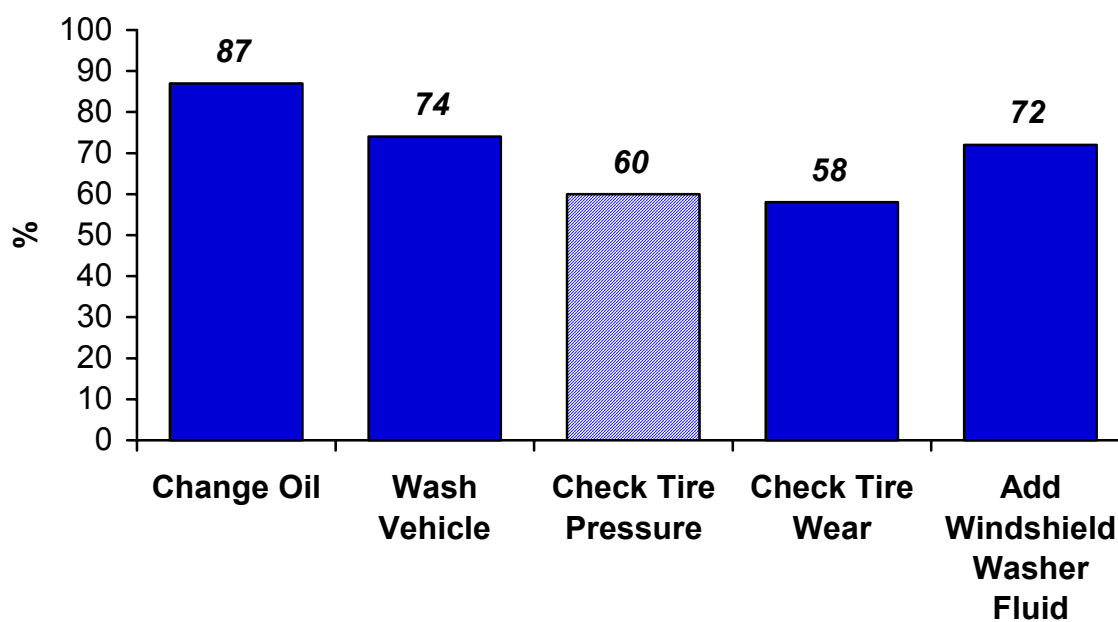
- Higher among men (56%) than women (38%);
- Higher among truck owners (62%) than car (42%) or van/SUV (40%) owners;
- Slightly higher among rural (51%) or non-college educated (50%) drivers than others;
- But, no different by age.

In the oversample states, regular monthly tire pressure checking is highest in Colorado (47%), but below the national average in California (39%), Washington (39%), and Oregon (37%).

When those who regularly perform these five vehicle maintenance procedures fairly frequently are factored in, about three-quarters or more of U.S. drivers regularly change their vehicle's oil (87%), wash their vehicle (74%), or add windshield fluid (72%). Three-in-five regularly (every other month) check tire pressure (60%) or check tire wear (58%).

This means about 40% of U.S. drivers either are not checking tire pressure or wear even a minimum of 6 times a year.

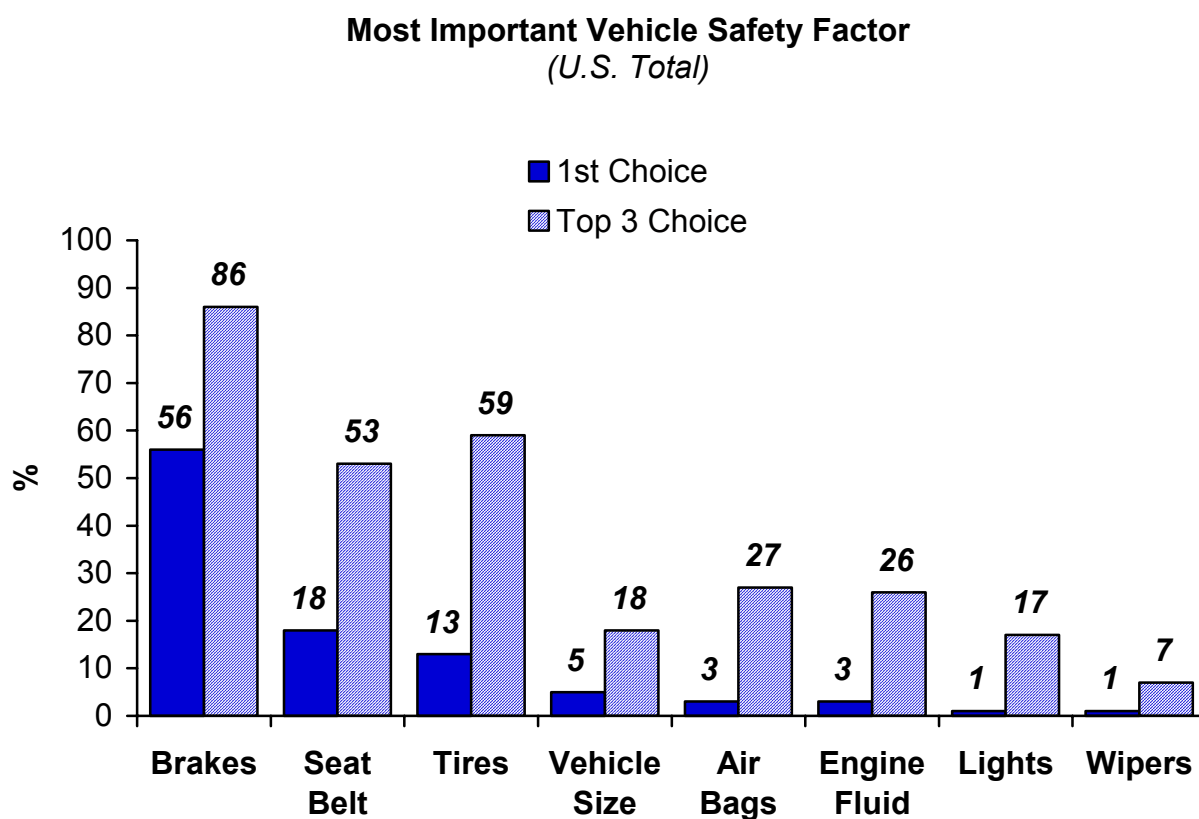
Various Vehicle “Maintenance Behaviors” – Fairly Frequent*
(U.S. Total)



-
- * Change Oil: “Every 10,000 miles or less”
Tire Pressure: “6+ times a year”
Wash: “Once a month or more”
Tire Wear: “6+ times a year”
Windshield Washer Fluid: “2+ times a year”

III. Vehicle Safety Factor.

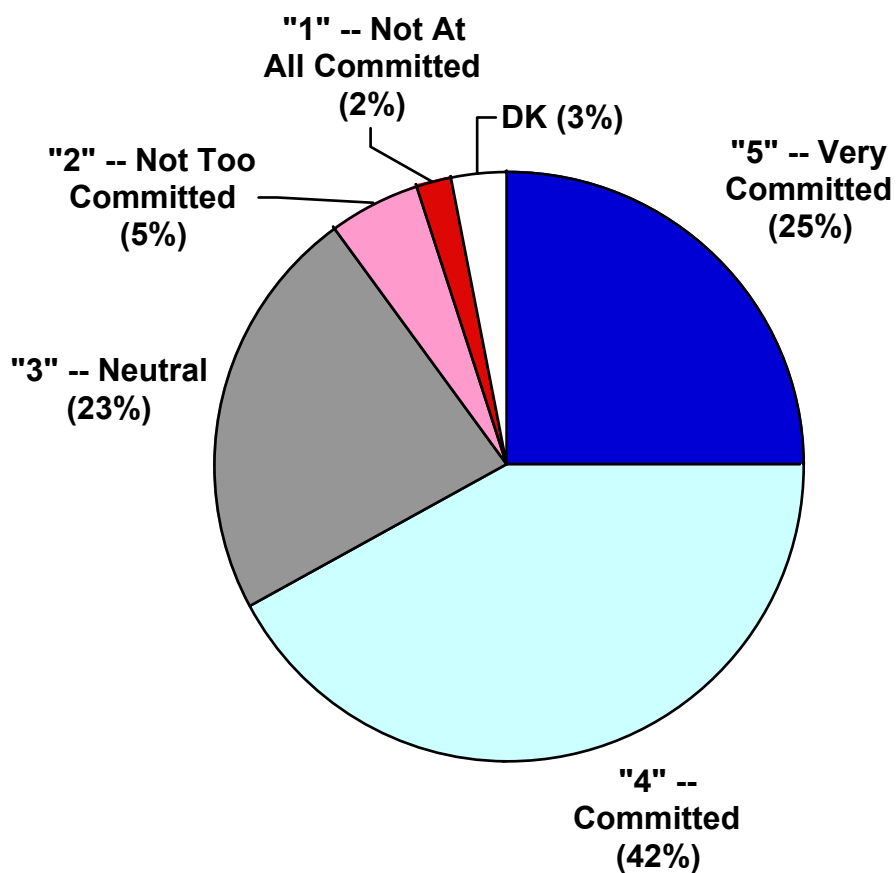
Of 8 vehicle safety factors, U.S. drivers rank tires second behind brakes (three choices allowed). This puts tires slightly ahead of seat belts but, well ahead of vehicle size, air bags, engine fluids, lights, and wipers as the most important factor to the safe operation of a vehicle. As a first choice, tires (13%) rank just behind seat belts (18%) in third behind brakes (56%).



IV. Tire Manufacturers and Safety.

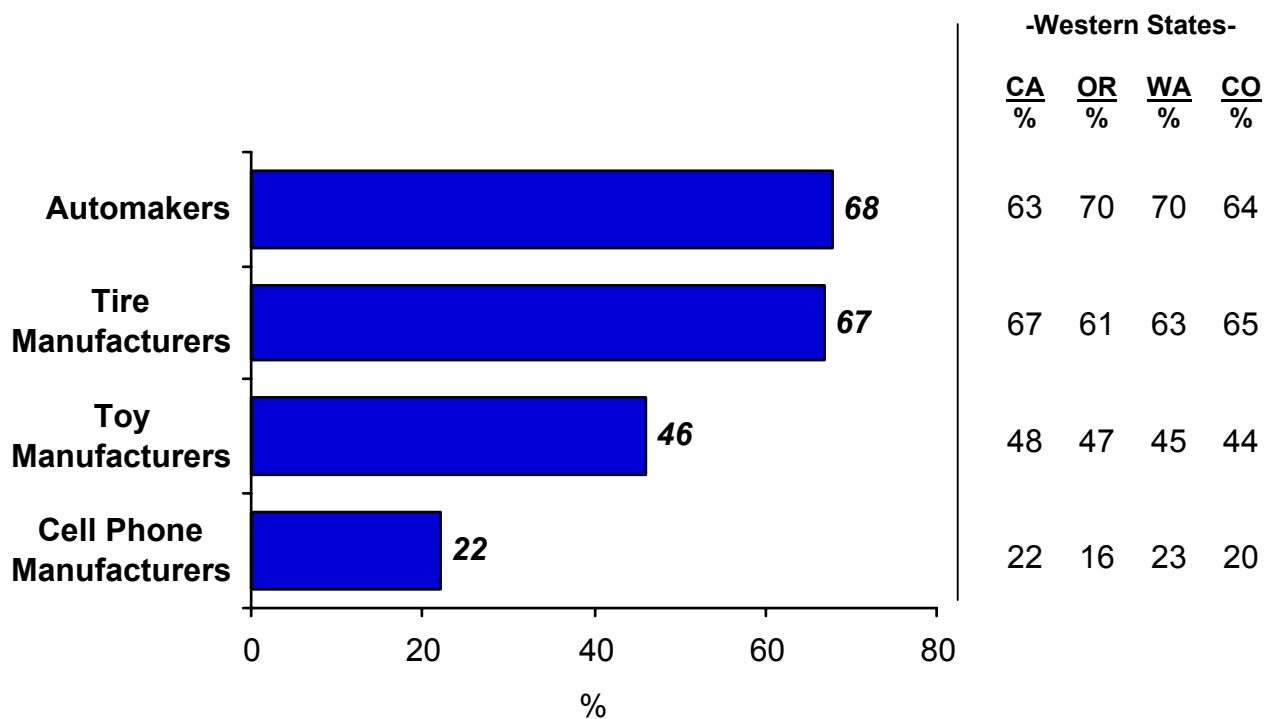
Two-thirds (67%) of U.S. drivers say tire manufacturers are “committed” to making a safe product. One-fourth (25%) say they are “very committed”. Just 7% who say tire manufacturers are “not committed” to making a safe product.

Rating of Tire Manufacturers as Committed to Making a Safe Product
(1-5 scale)



In rating other industries on the same “committed to making a safe product” scale, tire manufacturers scores the same as auto makers, both well ahead of toy makers and cell phone manufacturers.

Rating of Tire Manufacturers Compared to Other Industries for Being Committed to Making a Safe Product
 (% “4” or “5” on a 1-5 scale)



V. Tire Safety Awareness.

Proper Pressure Source

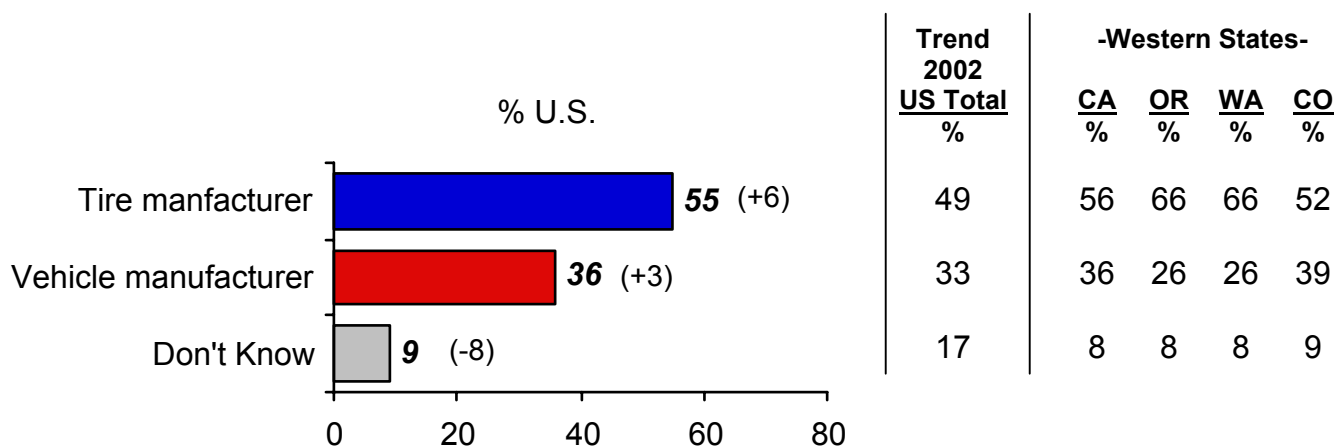
More U.S. drivers continue to believe that the tire manufacturer (55%) than the vehicle manufacturer (36%) sets the proper tire inflation pressure. This misperception is even more pronounced in Oregon (66-26) and Washington (66-26) as well as among truck owners (66-29).

By gender, women are closer to the correct answer than men; women choose tire over vehicle manufacturers by just 9 points (49-40) while men say tire over vehicle manufacturers by 28 points (61-33).

Source for Proper Vehicle Tire Inflation Pressure

From what you know, who sets the proper tire inflation pressure for your car or your vehicle?

- The tire manufacturer, who has it printed on the side of the tire. --OR--
- The vehicle manufacturer, who has it printed either in the owner's manual or somewhere on the interior of the vehicle.



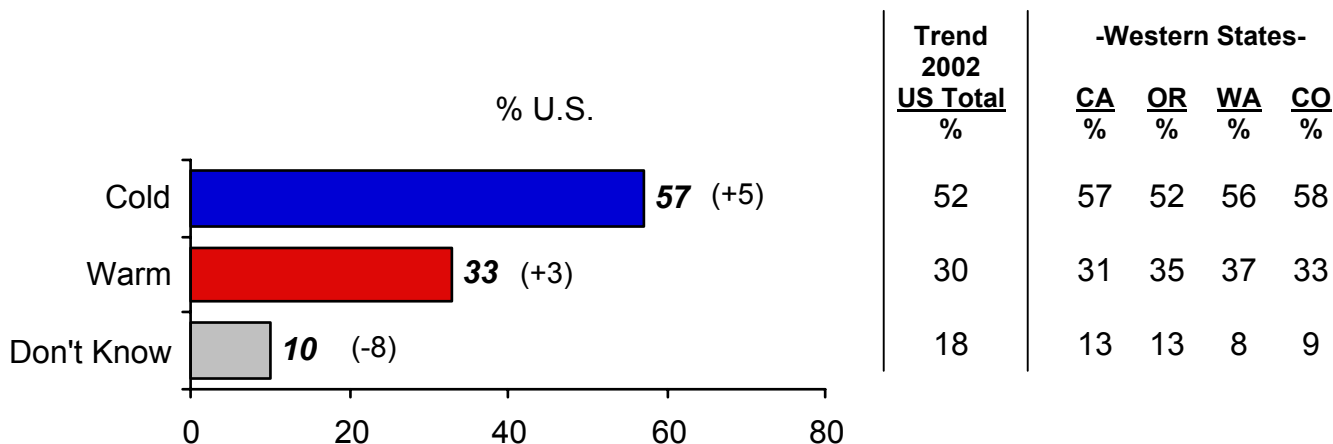
Cold vs. Warm

More U.S. drivers know to check vehicle tire pressure when cold (57%) than warm (33%). This awareness is consistent across all oversampled states, but in this case, higher among men (61%) than women (52%). Awareness of “cold” checking is up 5 points from 2002 among all U.S. drivers.

Best Time to Check Tire Pressure

When is the best time to check the pressure of your vehicle’s tire? Is the best time when your tires are...?

- *Warm, because you have driven on the tires. --OR--*
- *Cold, because you have not driven on the tires.*

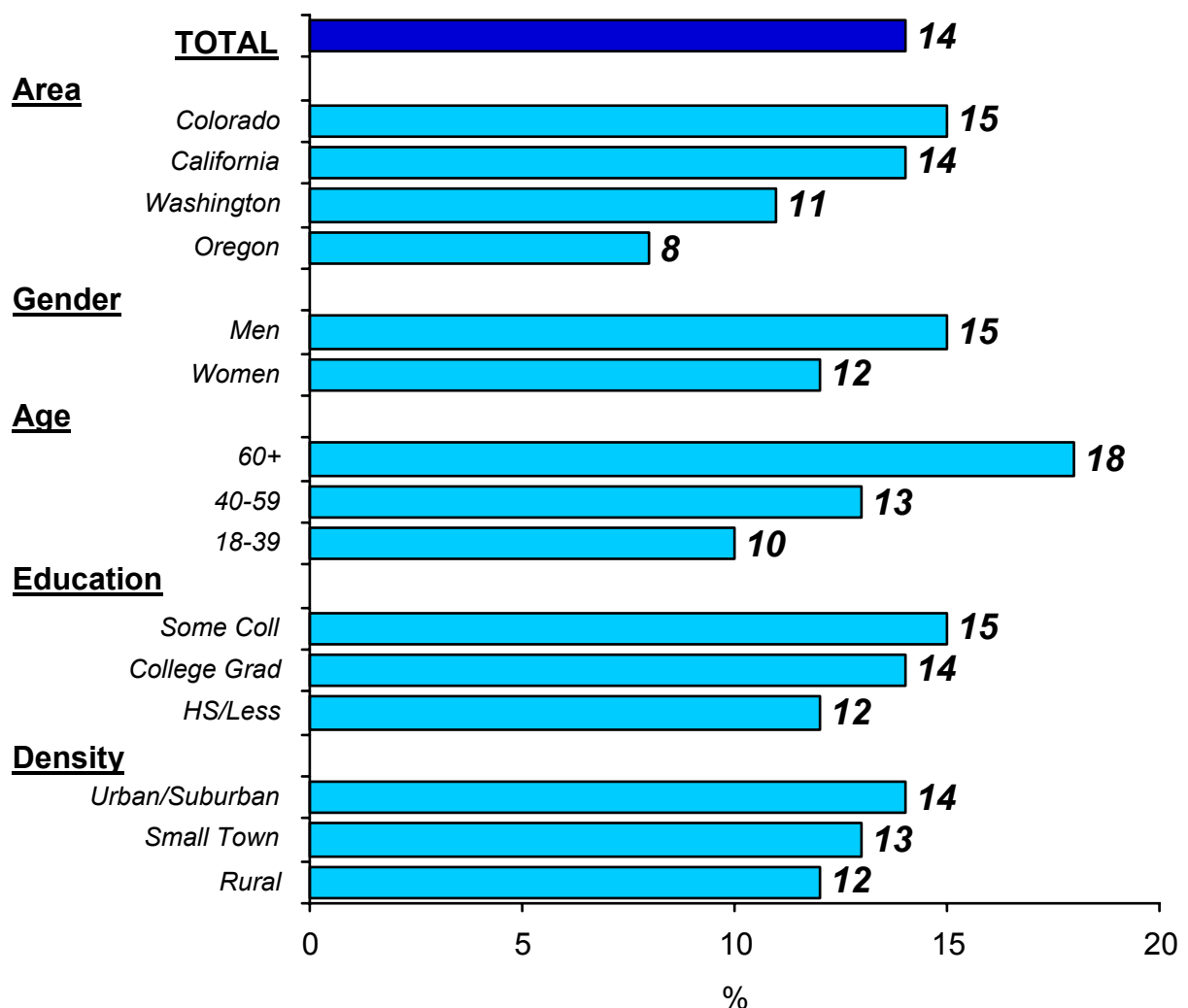


“Tire Smart”

A total of 14% of U.S. drivers can be considered “tire smart” ... they checked tire pressure within the last month and know to do so properly -- when cold and using a pressure set by the vehicle manufacturer.

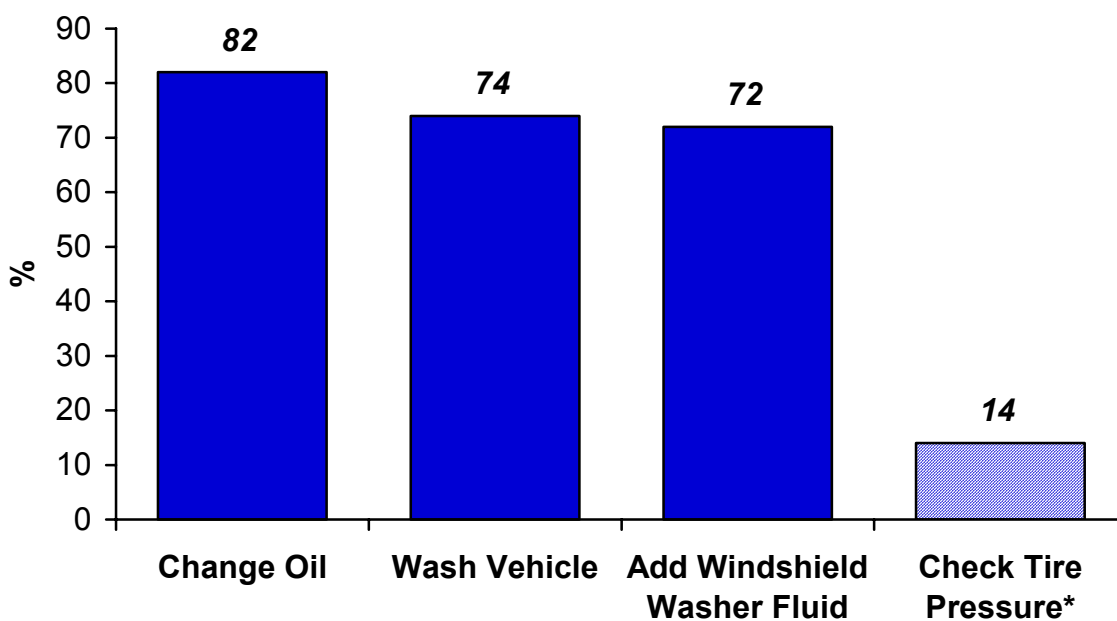
This 14% “tire smart” figure for 2003 is up 3 points from 11% in 2002.

Percentages of “tire smart” drivers are as follows:



“Tire Smart Drivers” Compared to Other Vehicle Maintenance Behaviors

The 14% of U.S. drivers who CORRECTLY check their tires’ pressure is significantly lower than the extremely high percentage of U.S. drivers who CORRECTLY perform other vehicle maintenance procedures such as change oil at least every 5,000 miles (82%), wash their vehicle at least once a month (74%), or add washer fluid at least every 6 months.



* “Tire Smart”: Check tire pressure once a month or more; check pressure when cold; use vehicle manufacturer pressure.

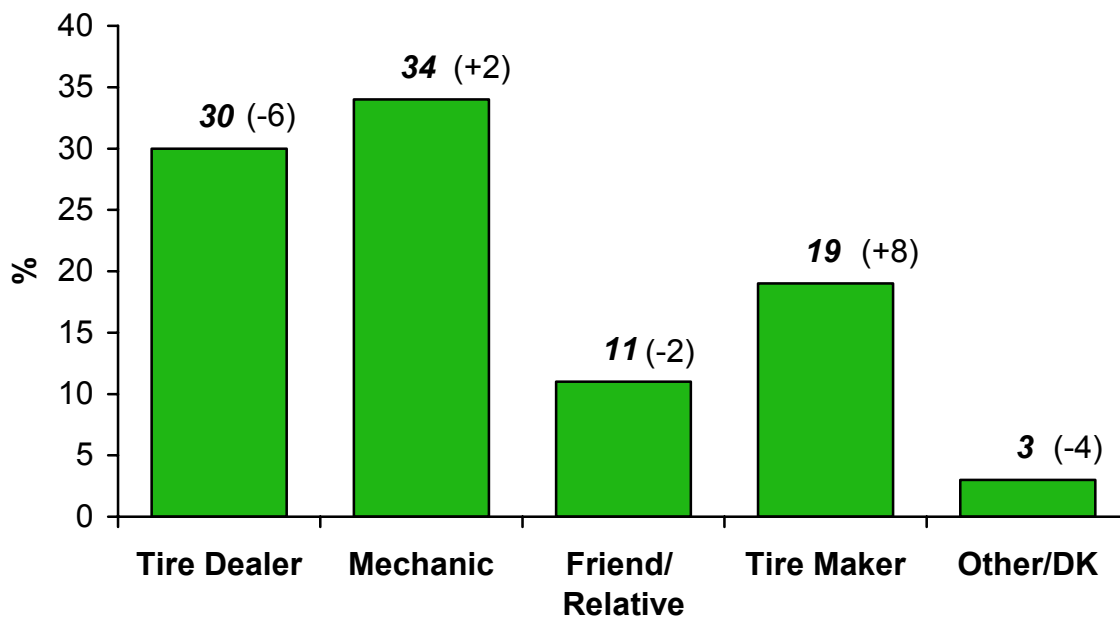
Trusted Information Source

About half of U.S. drivers would trust a tire industry representative most for information about proper tire care; 30% would trust a tire dealer and 19% a tire maker.

About one-third would first trust a mechanic.

A significant difference in “who trust” exists by gender; 59% of men but only 40% of women trust a tire dealer or manufacturer for tire care information. Women tend to rely more on mechanics (42%) or friends/relatives (16%).

Most Trusted Source for Proper Tire Care Information
(U.S. Total vs. 2002)

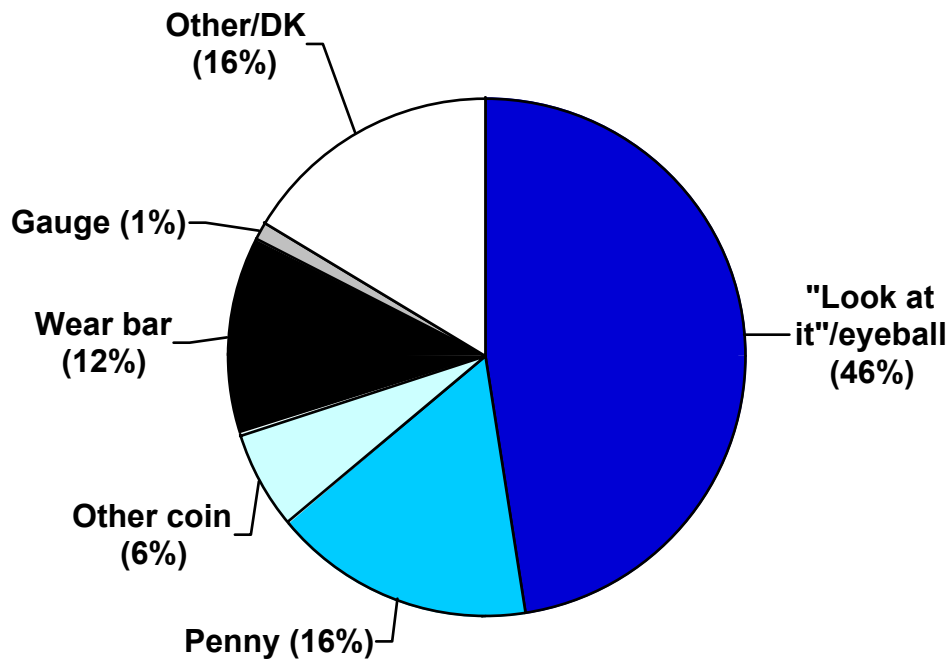


Tread Wear

Based solely on volunteered knowledge, 31% of U.S. drivers mention one of two correct methods for checking tire wear – 19% “penny” and 12% “wear bar.”

Nearly half of U.S. drivers believe tire wear can be determined simply by “looking at” the tire. Another 6% mention some type of coin, but do not know the correct answer – a penny.

Best Way to Tell if Tire Tread is Worn Out
(Volunteered Responses)

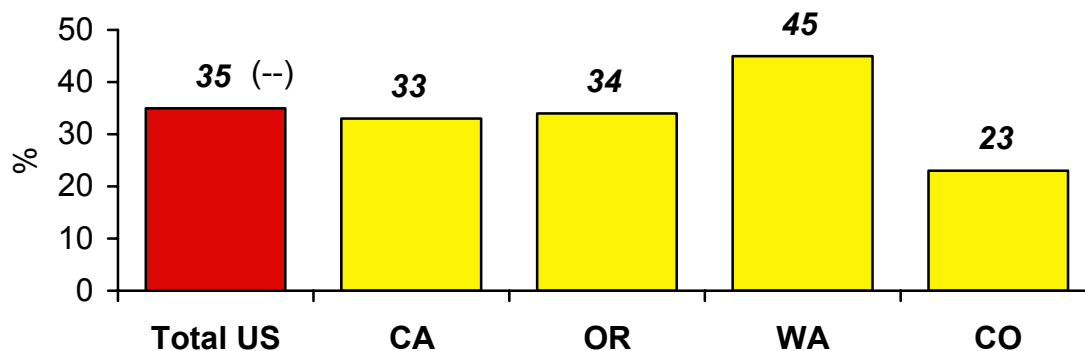


When asked specifically “what commonly available item can be used” to check tire wear, 35% (the same as in 2002) name “a penny.” Washington State drivers (45%) are most aware of the penny test, Colorado drivers (23%) are least aware. Men (40%) are more aware than women (29%) while young drivers (25%) are least aware of the penny test.

Those who pass the “tire smart” test are 43% aware of the penny test.

Awareness of “Penny” Tire Test

Do you happen to know what commonly available item can be used to check if your tires have enough tread to be safe? What is that?



Full Load Pressure

A 55% majority of U.S. drivers continue to know it is wrong to underinflate tires for a long trip in a fully loaded vehicle. Awareness on this is off 5 points since 2002.

Opinion on Tire Care Statements

“If you are going to be taking a long trip with your vehicle fully loaded, you are better off if your tires are a little underinflated or softer than usual.”

