

Low Rolling Resistance Tires

Survey Report

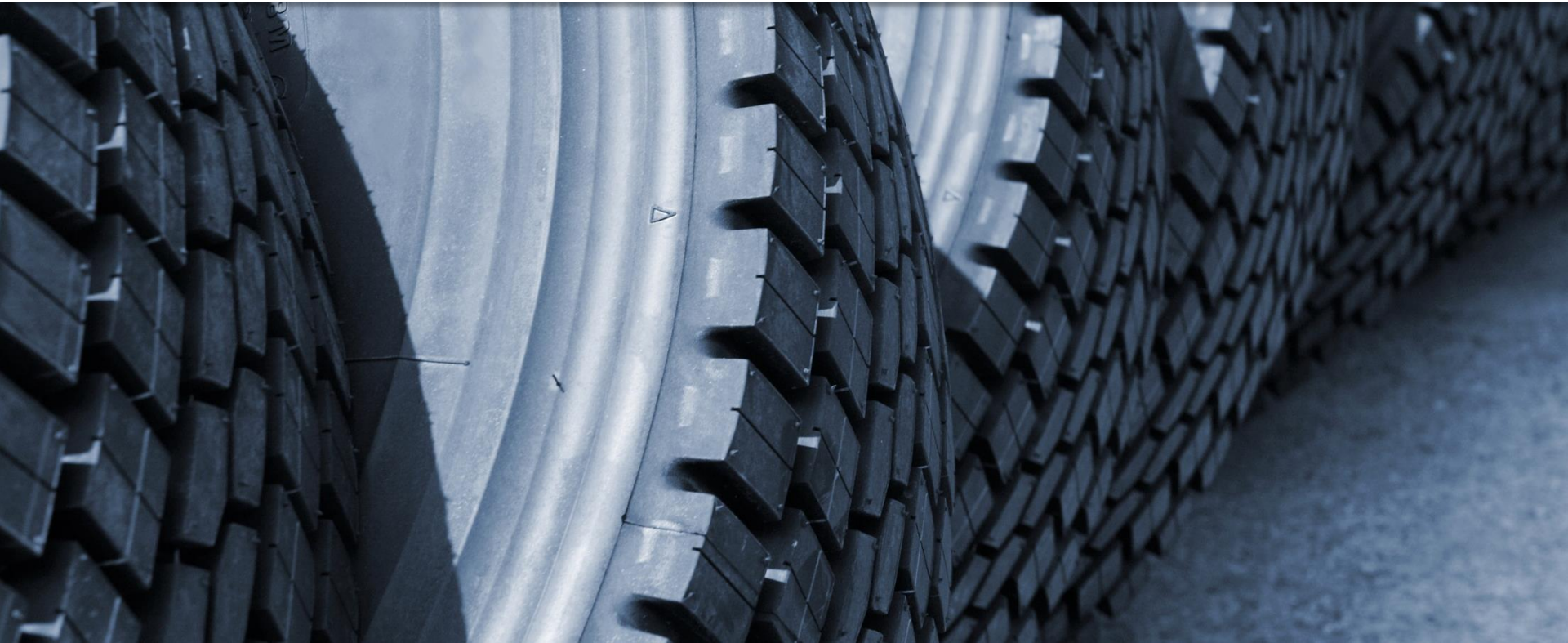
April 25, 2017



Tire and Rubber
Association
of Canada

L'Association
canadienne du pneu
et du caoutchouc

Leger



METHODOLOGY

QUANTITATIVE RESEARCH

INSTRUMENT

A survey of 800 Canadian motorists who are responsible for the maintenance of a personal vehicle was completed online between April 10 to April 20, 2017 using Leger's online panel, *LegerWeb*.

A probability sample of the same size would yield a margin of error of +/-3.5%, 19 times out of 20.

ABOUT LEGER'S ONLINE PANEL

Leger's online panel has approximately 475,000 members nationally – with between 10,000 and 20,000 new members added each month, and has a retention rate of 90%.

QUALITY CONTROL

Stringent quality assurance measures allow Leger to achieve the high-quality standards set by the company. As a result, its methods of data collection and storage outperform the norms set by WAPOR (The World Association for Public Opinion Research). These measures are applied at every stage of the project: from data collection to processing, through to analysis. We aim to answer our clients' needs with honesty, total confidentiality, and integrity.

Detailed Results

A blue-tinted photograph of a long row of tires stacked in a warehouse. The tires are arranged in a perspective that recedes into the distance. The text "Detailed Results" is overlaid in white, bold, sans-serif font in the upper left quadrant. On the left side of the image, the text "133/148M" is visible on a tire sidewall. A small white triangle is also visible on the tread of a tire in the foreground.

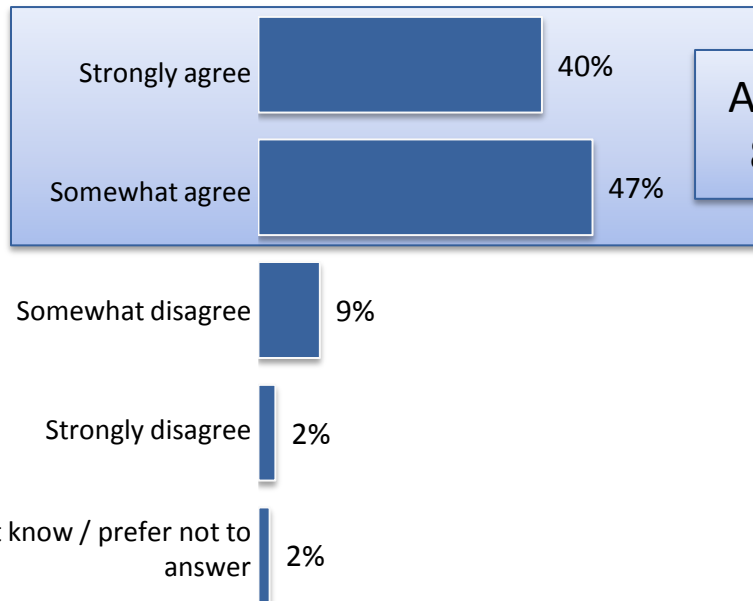
ENVIRONMENTAL IMPACT OF VEHICLE

Agree / disagree with the following statement:

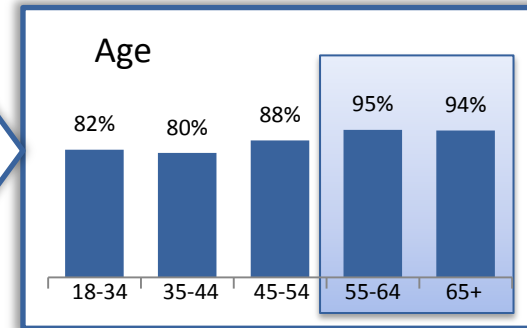
Drivers have a moral obligation to protect the environment by ensuring their vehicles are as fuel-efficient as possible.

Similar to 2016, the majority (87%) of Canadian motorists agree that drivers have a moral obligation to protect the environment by ensuring their vehicles are as fuel efficient as possible.

Canadians 55 and older are significantly more likely to agree, compared to those under 55.



Agree:
87%



ENVIRONMENTAL IMPACT OF VEHICLE

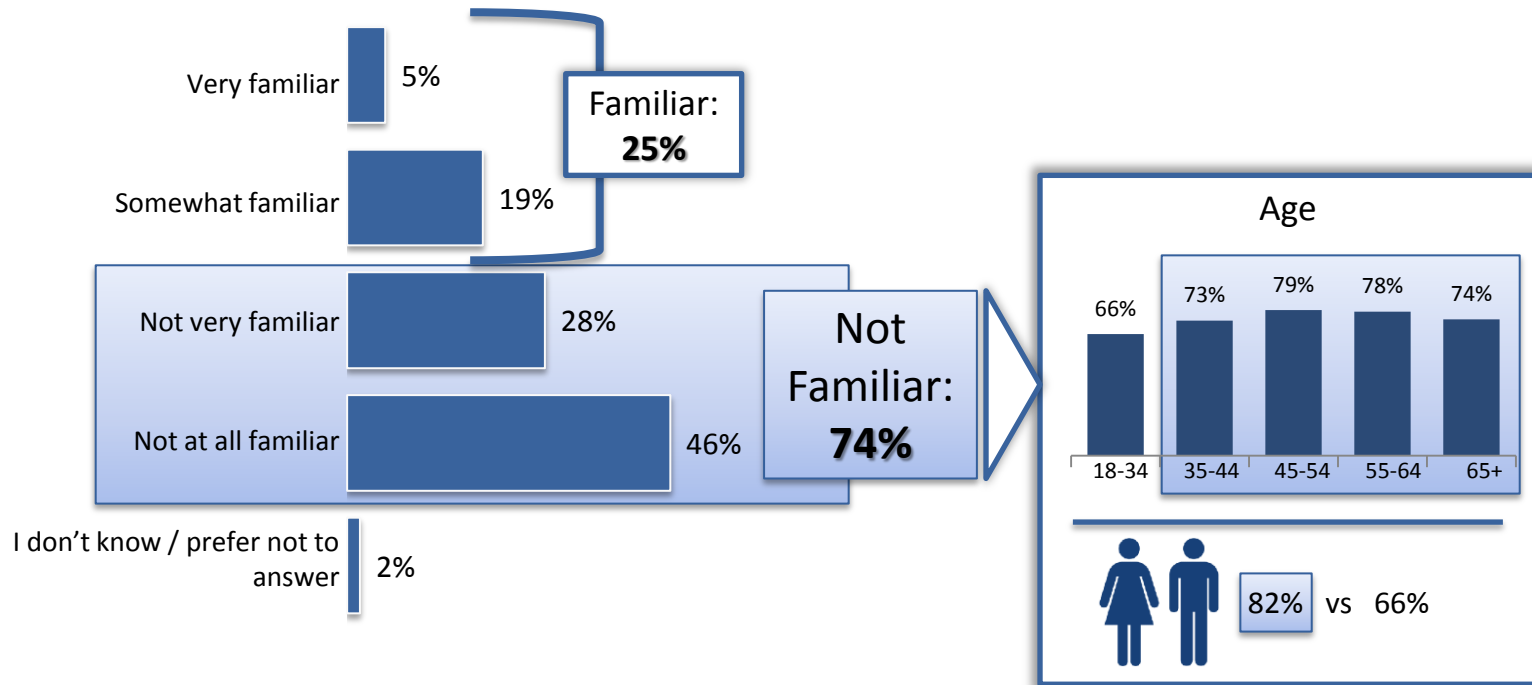
Agree / disagree with the following statement: **Drivers have a moral obligation to protect the environment by ensuring their vehicles are as fuel-efficient as possible.**

	Total	ON	QC	MB/SK	AB	BC	ATL
n=	800	316	215	66	72	80	51
Top 2	87%	88%	91%	81%	84%	89%	80%
Strongly agree	40%	42%	42%	29%	27%	46%	45%
Somewhat agree	47%	46%	49%	52%	57%	43%	35%
Somewhat disagree	9%	9%	7%	13%	9%	5%	13%
Strongly disagree	2%	1%	1%	3%	8%	2%	3%
Bottom 2	11%	11%	8%	15%	16%	7%	17%
I don't know / prefer not to answer	2%	1%	1%	4%	-	4%	3%

FAMILIARITY WITH LOW ROLLING RESISTANCE TIRES

Roughly three-quarters (74%) of Canadian motorists are not familiar with Low Rolling Resistance Tires, while 25% are familiar (a 4% increase from 2016). Similar to 2016, Canadians 35 and older (vs 18-34) and women are significantly more likely to be 'not familiar' with Low Rolling Resistance Tires.

Level of familiarity with Low Rolling Resistance Tires:



FAMILIARITY WITH LOW ROLLING RESISTANCE TIRES

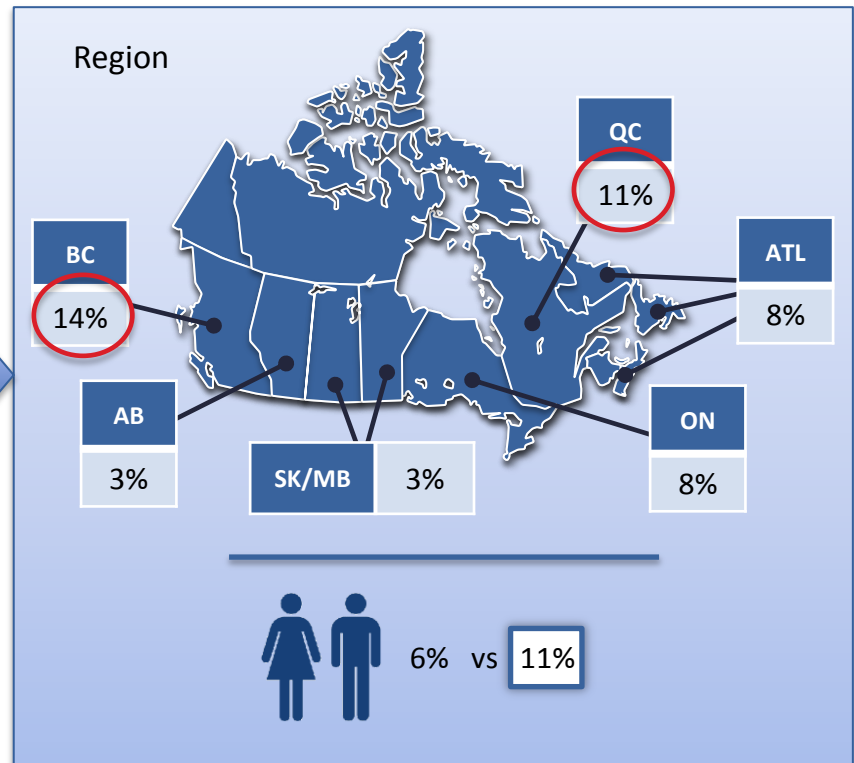
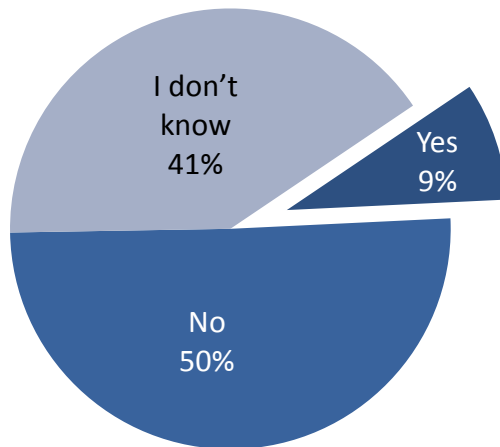
Level of familiarity with Low Rolling Resistance Tires:

	Total	ON	QC	MB/SK	AB	BC	ATL
<i>n=</i>	800	316	215	66	72	80	51
Top 2	25%	28%	20%	18%	24%	29%	22%
Very familiar	5%	6%	4%	3%	3%	7%	7%
Somewhat familiar	19%	21%	16%	15%	21%	21%	15%
Not very familiar	28%	26%	35%	31%	25%	17%	36%
Not at all familiar	46%	44%	42%	50%	49%	54%	39%
Bottom 2	74%	70%	77%	81%	75%	71%	75%
I don't know / prefer not to answer	2%	2%	2%	1%	1%	-	3%

LOW ROLLING RESISTANCE TIRES

Similar to 2015, half (50%) (2016: 55%) of Canadian motorists do not have a vehicle equipped with Low Rolling Resistance Tires and one-in-ten (9%) (2016: 8%) Canadian motorists do have Low Rolling Resistance Tires. There are still many (41%) (2016: 37%) Canadians motorists who do not know if they are equipped with Low Rolling Resistance tires. Quebec and BC residents, as well as men (vs women) are more likely to have currently have Low Rolling Resistance tires on their vehicle.

Is your vehicle currently equipped with Low Rolling Resistance tires?



LOW ROLLING RESISTANCE TIRES

*Is your vehicle currently equipped with
Low Rolling Resistance tires?*

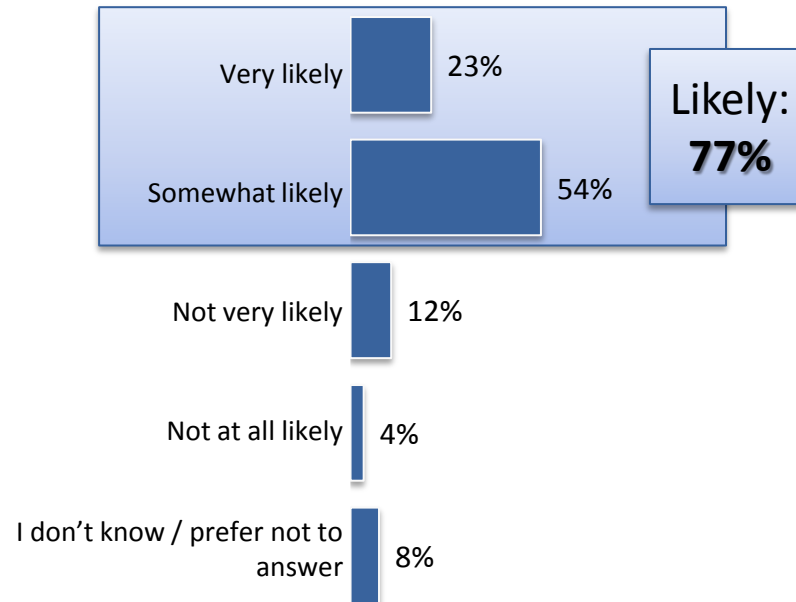
	Total	ON	QC	MB/SK	AB	BC	ATL
<i>n=</i>	800	316	215	66	72	80	51
Yes	9%	8%	11%	3%	3%	14%	8%
No	50%	53%	42%	51%	52%	55%	50%
I don't know	41%	38%	47%	46%	45%	31%	42%
I prefer not to answer	<1%	1%	-	-	-	-	-

LOW ROLLING RESISTANCE TIRES

More than three-quarters (77%) of Canadian motorists are likely to buy a set of Low Rolling Resistance Tires if the cost is offset by better fuel economy, an 8% increase from 2016 (2016: 69%). Canadian motorists who agree drivers have a moral obligation to protect the environment by ensuring their vehicles are as fuel-efficient as possible are significantly more likely to buy a set of Low Rolling Resistance Tires if the cost is offset (80% vs 54%).

How likely would you be to buy a set...

..if the additional cost of buying Low Rolling Resistance tires was offset by better fuel economy, giving you a net savings of approximately \$100?



LOW ROLLING RESISTANCE TIRES

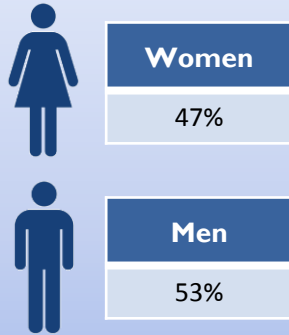
*How likely would you be to buy a set...
..if the additional cost of buying Low Rolling Resistance tires was offset by better fuel economy, giving you a net savings of approximately \$100?*

	Total	ON	QC	MB/SK	AB	BC	ATL
<i>n=</i>	800	316	215	66	72	80	51
Top 2	77%	77%	79%	73%	73%	79%	75%
Very likely	23%	25%	21%	23%	22%	19%	24%
Somewhat likely	54%	52%	57%	50%	51%	59%	51%
Not very likely	12%	11%	11%	13%	16%	10%	11%
Not at all likely	4%	4%	3%	4%	6%	3%	3%
Bottom 2	15%	15%	14%	17%	22%	13%	15%
I don't know	8%	8%	8%	10%	6%	8%	10%

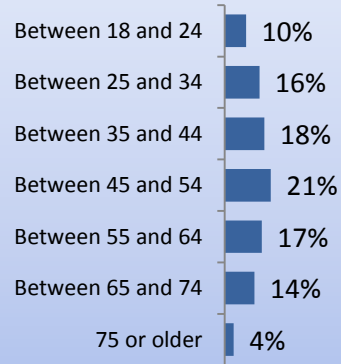
PARTICIPANT PROFILE (n=1,565)

DEMOGRAPHICS

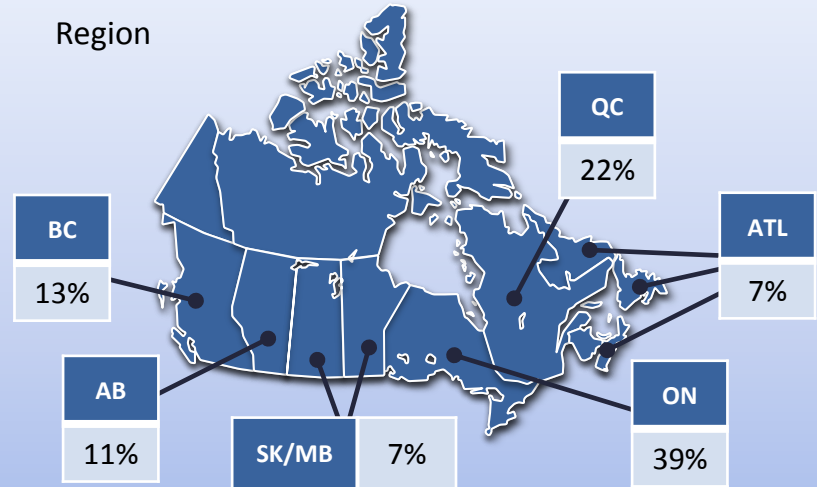
Gender



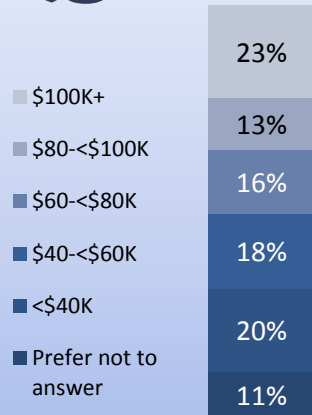
Age



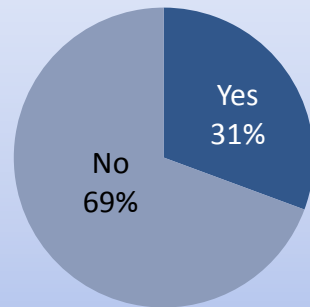
Region



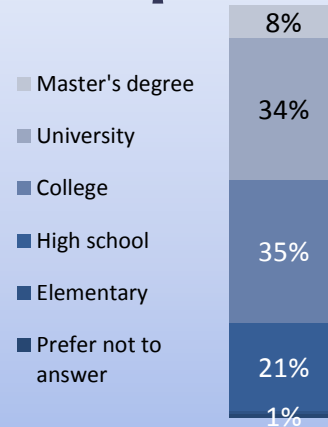
Household income



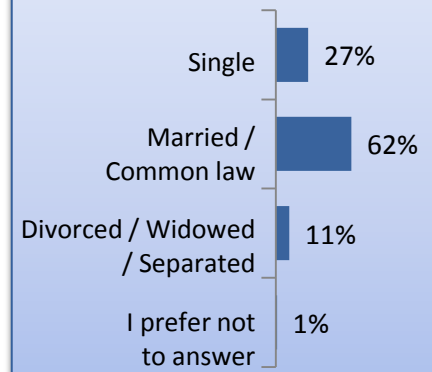
Households with children <18



Education



Marital Status





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