

2018

Winter Tire Report

*Winter Tires Prevent Hazardous
Road Situations*



Tire and Rubber
Association
of Canada

L'Association
canadienne du pneu
et du caoutchouc

About This Report

Tire and Rubber Association of Canada's *Winter Tire Report* assesses public perception and the market for winter tires in Canada. This report is made available to stakeholders in the tire and automotive industries, including tire and car manufacturers, retailers, government, road safety advocacy groups and media.

The scope of this report applies to passenger and light truck vehicle categories only.

TRAC reviewed and analyzed a broad range of market data and research on consumer perceptions related to winter tires in order to provide recommendations on educating Canadian motorists on safety and performance benefits of winter tires.

About TRAC's 2018 National Survey Instrument

An online survey of 1,524 Canadian motorists was completed between October 12-15, 2018, using Leger's online panel. The margin of error for this study was +/-2.5%, 19 times out of 20.

*Leger is the largest Canadian-owned polling, research and strategic marketing firm. Founded in 1986, Leger has gained an impressive knowledge base, and provides clients access to credible and reliable data. Leger clients include BlackBerry, Bank of Montreal, Johnson & Johnson, LG, L'Oreal, Mastercard, Merck, Microsoft, Migros, Nestle, Pfizer, Quebecor, Samsung, Staples, and Westjet.

Winter Tires Prevent Hazardous Road Situations

Key Findings

TRAC's 2018 Canadian Consumer Winter Tire Study shows that 80 per cent of winter tire owners believe driving a vehicle equipped with winter tires has saved them from being involved in a potentially hazardous driving situation such as loss of control or a collision. The Study also found that 76 per cent of Canadian motorists now use winter tires.

The Study clearly demonstrates that winter tire laws, public education, and financial incentives such as lower auto insurance premiums are the main driver when it comes to utilization of winter tires and making Canadian wintertime roadways safer.

Furthermore, based on statistical analysis of winter tire shipments across Canada (TRAC members only), the winter tire category has grown at an annualized rate of 4.5 per cent over the past six years. These numbers make winter tires the fastest growing category in the Canadian tire market. These statistics confirm that Canadians embrace the effectiveness of winter tires and the improved handling and safety provided by winter tires.

"The Study results are very encouraging and they attest once again that Canadian drivers are embracing the safety benefits of winter tires, and that they recognize them as the superior option for safe winter driving. We are pleased that Canadians are this responsive to the realities of winter driving and we will continue to educate the consumers about the winter tire advantage.

— Glenn Maidment
President, TRAC

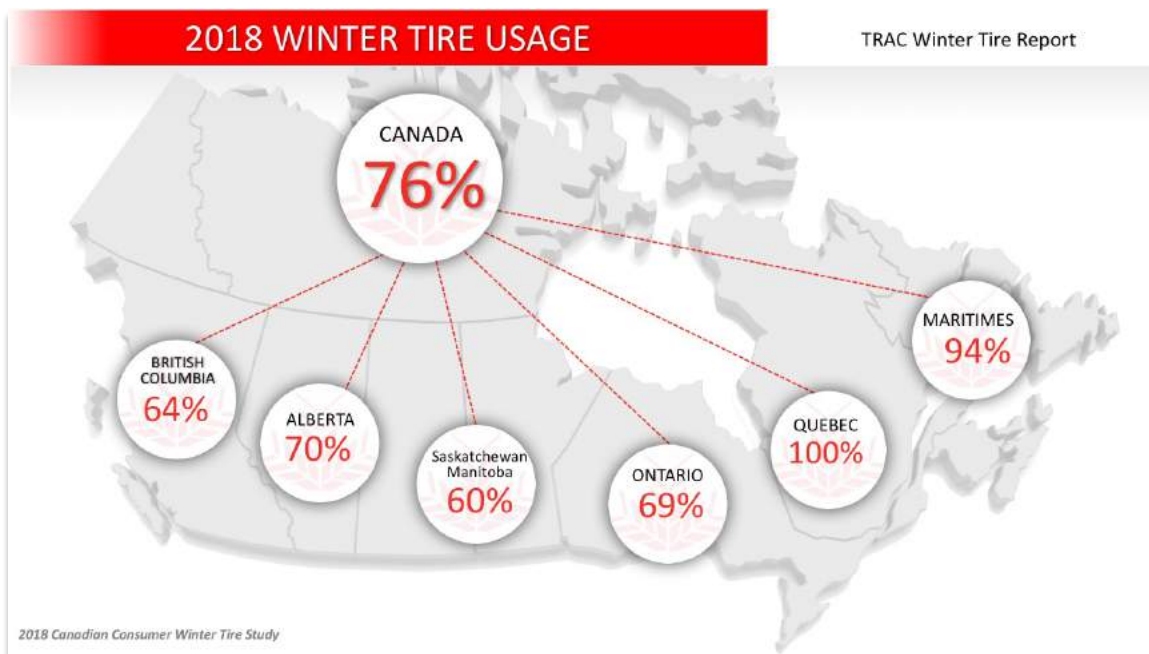
Undeniably, winter tires are seeing remarkable success in Canada, and TRAC continues to collaborate with government, industry, road safety organizations and other stakeholders on providing safe winter driving recommendations that include use of winter tires, and educating consumers about the safety benefits of winter tires.

Winter Tire Usage in Canada

TRAC 2018 Canadian Consumer Winter Tire Study

In 1998 only 35 per cent of Canadian drivers used winter tires. That figure has more than doubled in 2018. TRAC's 2018 Canadian Consumer Winter Tire Study shows that winter tire usage had grown to 76 per cent, which represents an increase of 10 per cent compared to 2017 (66 per cent); and, excluding Quebec, 71 per cent of the Canadian drivers will use winter tires in the 2018/2019 winter season.

Winter Tire Use by Region:



Province	Utilization 2018 (%)	Utilization 2017 (%)	Utilization 2016 (%)	Utilization 2014 (%)
National	76	66	68	58
Atlantic Canada	94	83	81	73
Quebec*	100	100	100	100
Ontario	69	59	65	56
Manitoba/Saskatchewan	60	48	50	39
Alberta	70	57	55	45
British Columbia	64	60	49	38

* Mandatory winter tire usage since 2008

The top motivations for owning winter tires are:

- Winter tire laws (34%),
- Advice from friends and family (17%),
- Lower auto insurance premiums (11%),
- Media coverage (7%).

Based on these numbers, winter tire laws, public education, and financial incentives such as lower auto insurance premiums play significant part in the utilization of winter tires and making Canadian wintertime roadways safer. Advice from family and friends also represents a major driver, and the increases in winter tire use link directly with drivers sharing their positive experience with winter tires.

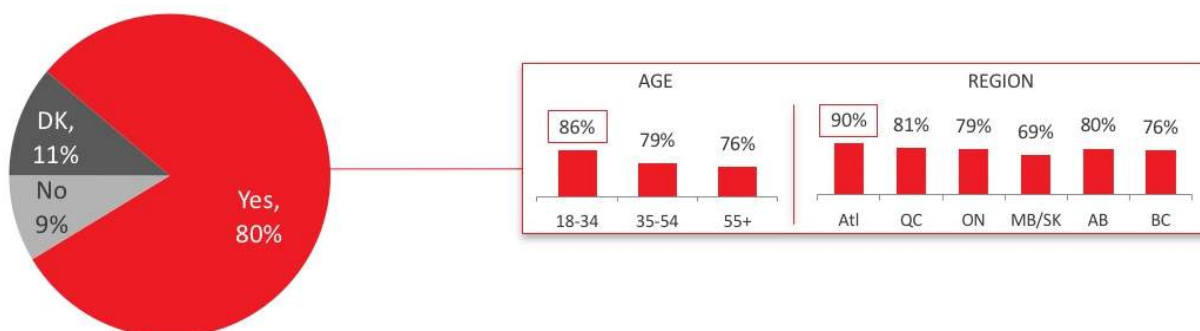
While we are seeing this strong trend in utilization of winter tires, three-in-ten motorists outside Quebec still resist winter tires. Top reasons for not owning winter tires are:

	Total*	Atlantic	ON	MB/SK	AB	BC
All-season tires are good enough	53%	51%	54%	76%	43%	53%
Too expensive	18%	-	21%	11%	29%	9%
I don't drive much in winter	15%	27%	15%	6%	7%	28%
I have no place to store off-season tires	3%	-	2%	3%	11%	2%
Other	6%	23%	5%	5%	8%	8%
DK/prefer not to answer	2%	-	3%	-	2%	-

*Excluding Quebec

Driver Perception of Winter Tires

Eighty per cent of winter tire owners believe that driving a vehicle equipped with winter tires has saved them from being involved in a potentially hazardous driving situation, such as loss of control or a collision. Younger winter tire owners and Atlantic Canadians are more likely to agree that driving a vehicle equipped with winter tires has saved them from being involved in a potentially hazardous driving situation.



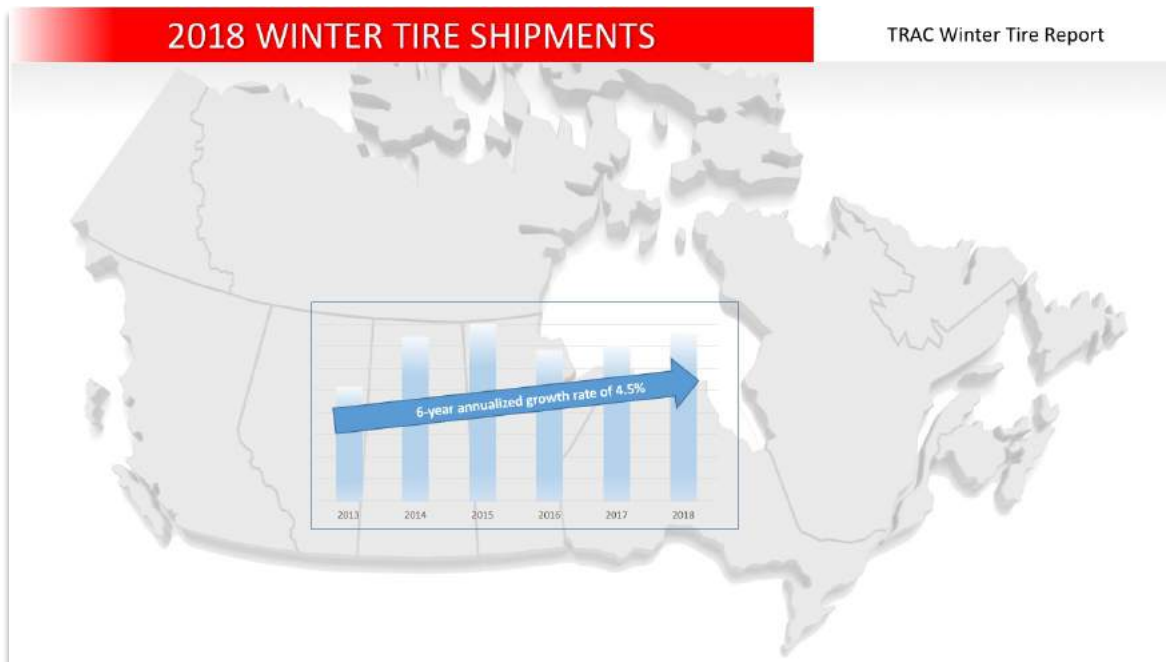
National Tire Shipments

The Tire and Rubber Association of Canada tracks all tire shipments into the Canadian market from its members, representing more than 80 per cent of the market.

Based on the statistical analysis of TRAC members' winter tire shipments across Canada, the winter tire category has grown at an annualized rate of 4.5 per cent over the past six years, making winter tires the fastest growing category in the Canadian tire market. *

"The Canadian winter tire market has seen a solid growth over the past several years as Canadians continue to embrace winter tires, and they are right to do so. Once the temperature dips below seven degrees Celsius, the performance benefits of today's high-tech winter tires outperform all other types of tires regardless of the road conditions.

— Paul Christou
Controller, Canada
Goodyear Canada Inc.



*Based on data collected by the Tire and Rubber Association of Canada.

Road Safety—The Case for Winter Tires

The following findings are supported by a report from the Traffic Injury Research Foundation (TIRF; www.tirf.ca) citing a range of studies that show conclusively that winter tires provide superior traction, braking and cornering in all cold-weather driving conditions, whether the road surface is dry, wet, icy or snow-covered.

Winter tires play a measurable role in increasing road safety and protecting drivers and traffic participants. The use of winter tires contributes to:

- preventing collisions, injuries and fatalities,
- reducing health and hospital emergency costs,
- reducing the number of police and ambulance emergency responses during winter,
- lowering the frequency and size of insurance payouts,
- reducing traffic congestion.

“Educating drivers about the safety advantages of winter tires is an important part of TRAC’s mandate, and our data proves that Canadians are on board when it comes to winter tires and road safety. Winter tires are the logical choice for driving in Canada’s harsh Nordic climate. We continue to work with the stakeholders and seek new ways to reach and educate all Canadian drivers about safe winter driving.”

— Tony Mougios
Canadian Zone Director,
Consumer Division
Michelin North America, Inc.

Quebec—Saving Lives and Reducing Accidents

The superior traction and braking capabilities of winter tires are proven to save lives and reduce personal injury accidents. The Quebec experience with its mandatory winter tire usage and full data represents the best example.

A 2011 study by the ministère des Transports du Québec demonstrates the road safety benefits of legislating winter tires. After the first two seasons of enforcement (winter 2008-2009/2009-2010):

- road accidents in winter decreased by five per cent,
- 574 fewer people were injured annually in winter road accidents,
- deaths and serious injuries due to winter road accidents decreased by three per cent.

Analysis and Insights

TRAC's 2018 winter tire research clearly demonstrates that:

- **government mandates, financial incentives, and public awareness campaigns play key role in educating Canadian drivers about safety advantages of winter tires and in persuading them to make the safe choice,**
- **drivers who use winter tires trust in their efficacy as an important vehicle safety feature,**
- **growing winter tire utilization contributes to safer roads, reduction in winter road collisions, injury and costs for thousands of Canadian motorists and their families each year.**

Canadian government agencies and road safety groups have been very receptive to the safety advantages of winter tires and continue to work toward increased awareness and driver education in this segment, and continue to encourage increased winter tire usage nationwide by providing education, leadership, and guidance.

TRAC's role focuses on educating government leaders, interest groups, stakeholders and the public about the safety and performance benefits of winter tires; and has been participating in:

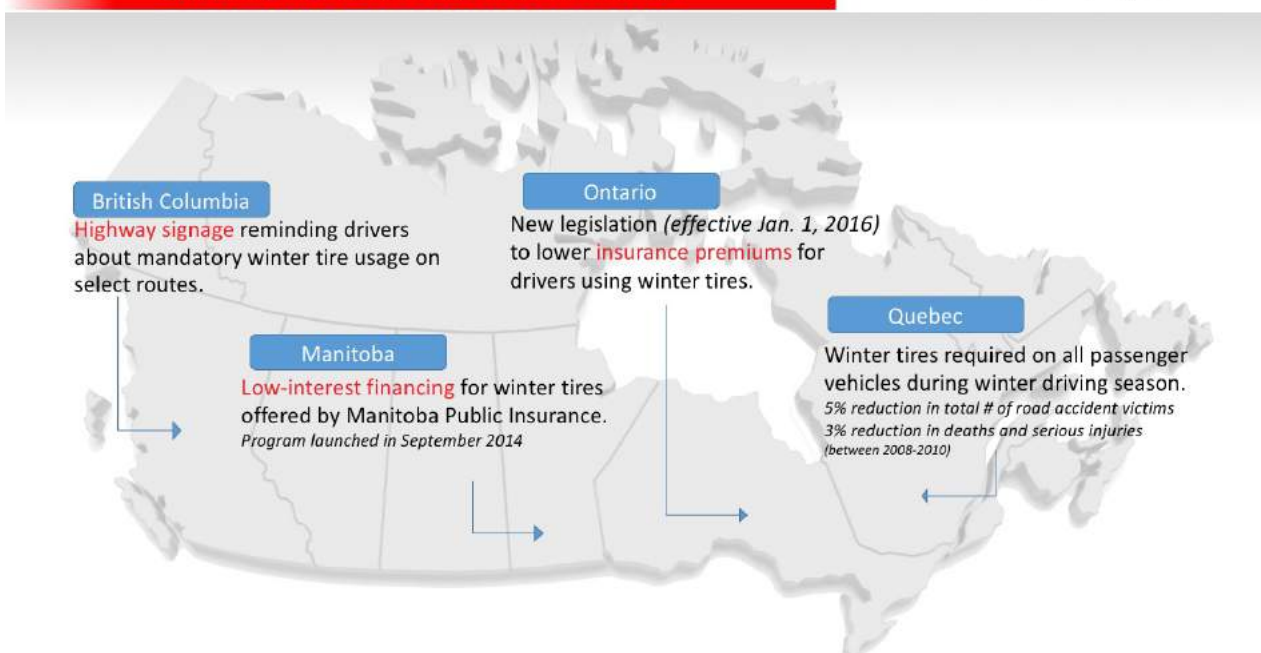
- promoting the safety benefits of winter tires with government bodies and traffic safety organizations,
- creating educational resources and campaigns through its consumer-oriented Be Tire Smart brand (www.betiresmart.ca),
- promoting winter tire usage on government fleet vehicles,
- winter tire messaging on highway signage,
- incorporating winter tire messaging into driver training and handbooks.

Winter Tire Initiatives by Province

Province	Tire Initiative
British Columbia	British Columbia recently updated the language on signage for certain mountainous highways, indicating the requirement to use tires marked with the Three-Peak Mountain Snowflake Symbol or M+S marking between October 1st and March 31st.
Manitoba	An innovative program from the government of Manitoba and administered by Manitoba Public Insurance offers low-interest loans for the purchase and installation of qualified winter tires. The program launched in September 2014. Since then, more than 71,000 applications have been processed. This program provides loans to a maximum of \$2,000 per vehicle, for up to 48 months at the rate of prime, plus two per cent. More information on this low-cost loan program can be found at www.mpi.mb.ca .
Ontario	Effective January 1, 2016, the government of Ontario implemented legislation which requires all insurance providers to reduce auto insurance premiums to drivers who have four winter tires installed on their personal passenger vehicles. Motorists are advised to ask their insurer about how to qualify.
Quebec	Since 2008, the Province of Quebec has mandated winter tires on all passenger vehicles. Winter tires are required from Dec. 15th, to Mar. 15th.

2018 WINTER TIRE INITIATIVES

TRAC Winter Tire Report



Winter Driving Safety Initiatives by Province

Traveler Information Services

Many provinces provide traveler information services. The 511-telephone service available in New Brunswick, Nova Scotia, Prince Edward Island, Quebec, Ontario, Manitoba, Alberta and Yukon provides the public with voice-activated information on provincial highway conditions, road closures, and construction projects.

Newfoundland and Labrador provides regional numbers. Saskatchewan telephone number is 1-888-335-7623 (toll-free in Canada), for British Columbia call 1-800-550-4997 (toll-free in North America), for Northwest Territories call 1-800-661-0750.

British Columbia

The Winter Driving Safety Alliance (<https://shiftintowinter.ca/>) is a multi-agency working group that shares a common goal of reducing frequency and severity of winter-related motor vehicle crashes. Committed to improving the safety of drivers during the winter months, the Alliance is comprised of more than a dozen public, private and non-profit bodies, including TRAC.

Manitoba

Manitoba Public Insurance (<https://www.mpi.mb.ca>) is a non-profit Crown Corporation dedicated to keeping Manitoba's roads safe and vehicle insurance rates low since 1971. Its mandate includes education on winter driving, and the Winter Tire Program which provides low-interest financing for winter tires to eligible Manitobans.

Ontario

The Ontario Ministry of Transportation's Inter-Agency Road Safety Marketing Committee brings provincial road safety partners together to share information, support joint initiatives and develop awareness campaigns. The Agency works with community groups to promote safe and responsible winter driving practices, and increasing public awareness regarding MTO winter maintenance operations.

Shopping for Winter Tires

Canadians have many choices when it comes to winter tires. Individual driving habits and skillset, as well as vehicle type, road conditions, and local weather patterns play an important role when it comes to choosing the right winter tire. TRAC encourages drivers to research the tire option that is right for their individual needs: speak with local tire dealer or repair facility, and make the decision according to your individual driving needs. Additional information and resources about the safety, performance characteristics, and the list of dedicated winter tires offered by TRAC members for the 2018 winter season can be found at <http://www.tracanada.ca/>.

Identifying a Winter Tire

A winter tire features the **Three-Peak Mountain Snowflake Symbol** (also referred to as the 'Alpine Symbol') on its sidewall. The tire carrying this symbol meets the industry snow traction performance requirements.



Winter tire testing is rigorous, reliable and sophisticated. Winter tires marked with 3PMS symbol must follow the ASTM F-1805 tire test on medium-packed snow in standardized testing conditions. These tires are required to meet or exceed minimum industry snow traction requirements.

Winter Tire Safety and Performance Benefits

Winter tires provide superior traction and braking on cold-weather road surfaces. The superior grip of today's high-tech winter tires is the result of more flexible rubber compounds that provide superior traction even at extremely cold temperatures. These specialized rubber compounds coupled with sophisticated tread designs allow for greater control and braking capability on cold, dry, snow-covered, icy or slushy roads. Shorter stopping distances in emergency situations represent the primary safety feature of the advanced technology in today's winter tires. Research detailed in the study from Traffic Injury Research Foundation (TIRF; www.tirf.ca) shows that:

- at temperatures just below freezing, stopping distances for vehicles with winter tires are as much as 30 per cent shorter than for vehicles with all-season tires,
- winter tires deliver better traction on an ice or snow-covered road surface at -30°C vs. all-season tires at 4°C.

Temperature is everything when it comes to winter tires. At temperatures of 7°C or lower, winter tires outperform all-season and conventional summer tires, where these tires start to harden and lose traction. Monitoring tire pressure in winter months is particularly critical since tires can lose one (1) psi for every 5°C drop in temperature. During the cold-weather months, TRAC advises to measure tire pressure at least once a month using a reliable tire gauge.

Dedicated Winter Tires and Other Winter Tires

Advances in rubber compounding and tire design now offer more choice for consumers when it comes to tires for winter driving. Some dedicated winter tires are designed to perform better in snow, while others are designed to perform better on ice.

While dedicated winter tires are designed specifically for winter conditions, consumers have been introduced to tires which also display the Three-Peak Mountain Snowflake Symbol, however are made to be driven in warmer months as well, while meeting the snow traction performance requirements.

For the very best performance and safety in winter driving TRAC recommends dedicated tires manufactured specifically for winter road conditions. These tires are designed only for use during winter months and should be removed during the non-winter seasons as the tread compound is much too soft for summer driving.

All-Season Tires

As noted earlier, over 50 per cent of drivers currently not using winter tires believe that all-season tires offer sufficient traction and stopping power in winter road conditions. An “all-season” tire implies that it is suitable for all weather conditions; however, these tires do not have the Three-Peak Mountain Snowflake Symbol, and do not meet the necessary snow traction requirements to be considered a winter tire.

All-season tires are a compromise when it comes to traction and stopping power during winter driving season.

About the Tire and Rubber Association of Canada

The Tire and Rubber Association of Canada (TRAC; www.tracanada.ca) is the national trade association representing tire makers, rubber product manufacturers and importers as well as rubber recyclers and suppliers of goods and services related to the industry. TRAC is committed to educating drivers regarding proper tire care, maintenance, and usage. A key advocacy goal in the cold-weather months is to raise awareness of safe winter driving as well as the safety and performance benefits of winter tires.

TRAC Members

BRIDGESTONE





Tire and Rubber
Association
of Canada

L'Association
canadienne du pneu
et du caoutchouc

A19-260 Holiday Inn Drive
Cambridge, ON N3C 4E8

Phone: 519.249.0366

www.tracanada.ca; info@tracanada.ca