

8 KEY FIGURES FROM THE SURVEY¹

> AWARENESS AND PERCEPTION OF LABELLING

1. CONSUMERS ARE BECOMING MORE FAMILIAR WITH TYRE LABELLING

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36 % OF RESPONDENTS HAVE HEARD ABOUT THE NEW LABEL, COMPARED WITH 22% IN 2012. THE BRITISH ARE STILL LAGGING BEHIND (28%). BUT NOTHING SURPRISING IN THAT: THEY ARE TRADITIONALLY LESS INVOLVED IN THE MAINTENANCE OF THEIR CAR. THIS PERCENTAGE RISES TO 46% WITH RECENT BUYERS (WHO HAVE BOUGHT TYRES SINCE TYRE LABELLING WAS INTRODUCED), WHICH IS LOGICAL. BUT AMONG THEM, MANY (52%) ONLY DISCOVERED LABELLING WHEN BUYING THEIR TYRES.

2. ... AND THINK IT IS A GOOD INITIATIVE ...

72 % OF RESPONDENTS ARE IN FAVOUR OF A LABELLING SYSTEM TO HELP CONSUMERS MAKE BETTER PURCHASE DECISIONS. THIS IS EVEN TRUER WITH ITALIANS (87%) AND SPANIARDS (83%) THAN THE BRITISH AND GERMANS (59%). THE FRENCH FALL WITHIN THE AVERAGE.

3. ... BUT DON'T KNOW WHICH PERFORMANCES ARE EVALUATED

8 % OF RESPONDENTS WERE ABLE TO PROVIDE THE THREE LABELLING CRITERIA. IF THEY START BY MENTIONING – AND RIGHTLY SO – WET BRAKING AND ROLLING RESISTANCE, THEY ARE STILL HESITATING ON THE THIRD CRITERIA: WET HANDLING, LONGEVITY OR DRY BRAKING? EXTERNAL ROLLING NOISE – THE RIGHT ANSWER – ONLY GETS 21% OF MENTIONS, WHICH IS SOMEWHAT BETTER THAN IN 2012 (13%). FOR THIS, GERMANS ARE THE “GOOD PUPILS”.

¹ STUDY CONDUCTED BY THE IPSOS INSTITUTE BETWEEN 23/09 AND 8/10, AMONG 3.402 DRIVERS RESPONSIBLE FOR THE MAINTENANCE OF THEIR VEHICLES IN FRANCE, GERMANY, ITALY, SPAIN AND THE UNITED KINGDOM.

4. WET BRAKING IS STILL THE MOST IMPORTANT CRITERIA

85 % OF RESPONDENTS SAID, LIKE IN 2012, THAT WET BRAKING PERFORMANCE WAS THE MOST IMPORTANT TYRE LABELLING CRITERIA, WELL AHEAD OF ROLLING RESISTANCE (13%) AND EXTERNAL ROLLING NOISE (3%). IF ANOTHER CRITERION WAS ADDED, THEN LIKE LAST YEAR, MOST RESPONDENTS SAID THAT LONGEVITY (67%) WAS THE MOST IMPORTANT.

> IMPACT OF TYRE LABELLING ON PURCHASING BEHAVIOUR

5. RECENT BUYERS ARE STARTING TO TAKE THE LABEL INTO ACCOUNT ...

38 % OF BUYERS WHO RECENTLY BOUGHT TYRES PAID ATTENTION TO THE LABEL (11% A LOT, 27% A LITTLE) WHEN THEY LAST MADE A PURCHASE. THIS AVERAGE HIDES SIGNIFICANT VARIATIONS FROM ONE COUNTRY TO ANOTHER:

THE SPANIARDS (50%) AND ITALIANS (48%) ARE MUCH MORE SENSITIVE TO LABELLING INFORMATION THAN THE BRITISH (26%), THE GERMANS (32%) OR THE FRENCH (33%).

6. ... AND FIND THE LABEL CLEAR AND EASY TO UNDERSTAND

73 % OF THE SAME BUYERS (87% IN FRANCE) DID NOT NEED HELP TO UNDERSTAND THE SYSTEM USED FOR PERFORMANCE CLASSES. MOST OF THEM FOUND IT CLEAR AND EASY TO UNDERSTAND.

7. ... BUT LOOK AT THE PRICE FIRST

56 % OF RECENT BUYERS THAT PAID ATTENTION TO THE LABEL SAID, THAT WHEN THEY LAST BOUGHT TYRES, THEY FIRST SET A PRICE RANGE AND THEN LOOKED AT THE VALUES SHOWN ON THE LABEL. IN THEORY, RESPONDENTS REGARD SAFETY AS THE MOST IMPORTANT CRITERION (51%) WHEN BUYING TYRES, AHEAD OF THE PRICE (23%). BUT, WHEN IT COMES TO BUYING TYRES, THEY THINK IN TERMS OF VALUE FOR MONEY INSTEAD. SAFETY, YES, BUT NOT AT ANY PRICE!

8. ... AND ULTIMATELY RELY ON THE RETAILERS RECOMMENDATIONS

80 % AMONG THOSE OF RECENT BUYERS WHO HAD NOT DECIDED WHAT TO
BUY BEFORE ENTERING THE STORE ASKED THE RETAILER FOR ADVICE
AND THEN MOST (97%) FOLLOWED HIS RECOMMENDATIONS. THIS
SHOWS THAT RETAILERS STILL PLAY A DECISIVE ROLE IN THE CHOICE OF TYRES.
AND THIS, EVEN MORE SO IN SPAIN AND ITALY (87%).