



LECTURA Flash Survey

Tires

About LECTURA

LECTURA has been the leading provider of machinery intelligence on the market **since 1984**. Our database contains information and data on more than **147,778 heavy machinery models** and provides evaluation of used machines through our online tools and digital solutions.

This extensive database of equipment information attracts hundreds of thousands of professional visitors every month, when researching machinery before their purchase decision. This buyers guide represents the perfect platform to reach buyers and decision makers.

Our web portal LECTURA Press provides the latest news from the heavy machinery industry, exclusive interviews with industry experts and market leaders and publishes the quarterly online magazine the DigiMessenger in order to always bring the most relevant information to our readers.

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About LECTURA Flash Surveys

The world of heavy machinery incorporates many different industries and corresponding companies that manufacture either whole machines or suitable components. Moreover, some companies also provide services and solutions closely linked to heavy equipment like online trading platforms.

Flash surveys represent a new service by LECTURA that helps industry representatives to find out valuable opinions of our visitors – potential customers. The surveys are quick (hence “flash”) designed to run just 1-2 weeks. Nevertheless, our broad audience does not hesitate to participate, giving us the potential to reach 800 replies per day (depending on the chosen topic and targeting). It is an optimal way to achieve an important piece of market intelligence from construction, agriculture, and other related industries.

Where do the results come from? Our web portal LECTURA Specs visit more than **600,000 professionals monthly** and serve as the ultimate buyers’ guide. LECTURA Specs is a huge multi-lingual online database with almost **150,000 machinery models** enriched with specifications, datasheets, and daily updated pictures. Our audience consists of machine owners/buyers, dealers, engineers, contractors, farmers, repair shops, service providers, and other professionals that search for information via LECTURA services every day.

Flash Survey: Tires

Heavy equipment requires specialized tires for various applications. While some types of equipment have continuous tracks applicable to more severe service requirements, tires are used where greater speed or mobility is required. An understanding of what equipment will be used for during the life of the tires is required for proper selection. Tire selection can have a significant impact on production and unit cost. Therefore, the aim of current research was to discover where the visitors of LECTURA Specs usually buy their tires, from which manufacturers/or what is their preferred brand and when do they think is the right time for new tires purchase.

The survey ran in two waves for two weeks each of the data gathering waves. Data was collected from 16th November to 30th November in the first wave – where overall, 1626 respondents participated in the current research (the participation was voluntary with no incentives). The second wave ran from 14th December to 20th December. Therefore the total number of people participating in the survey reached 2645.

The survey consisted of three questions:

Where do you usually buy tires?

Would you usually share three brands you usually buy tires from? (open-ended question in the first wave. After the most popular brands had been explored, the question format altered from open-ended to closed-ended format.)

How often do you buy tires? (Likert scale)

The current survey report provides the results obtained from the general survey samples and the comparison of answers provided by the Specs audience from the European Union and North America. In contrast to previous analyses from the Flash Survey series, the current one focuses on potential differences between three industrial sectors: Construction, Agriculture, and Material Handling.

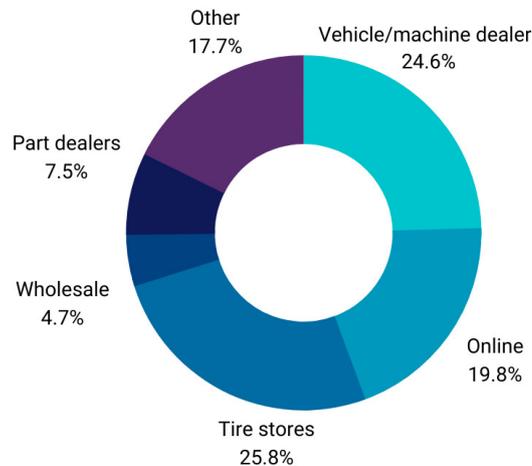


TIRES: Global Results

The results are presented as follows. First of all, the service where usually people buy tires are presented. Then follows the rank ladder of preferred tire brands and finally we explore how often do the respondents buy new tires.

WHERE DO YOU USUALLY BUY TIRES?

When focusing on the answer distribution about tire purchasers, most of our respondents claimed they buy new tires directly from their vehicle or machine dealer (24.6%). Interestingly, when thinking about the advantages of this type of purchasing and the current situation influenced by pandemic understandable, 19.8% of respondents usually purchase new tires online. 25.8% of respondents buy new tires from specialized tire stores. Part dealers and wholesale were the least frequently chosen options (Part dealers: 7.5%; Wholesale 4.7%). However, despite our predefined options, 17.7% of respondents claimed they buy tires elsewhere.



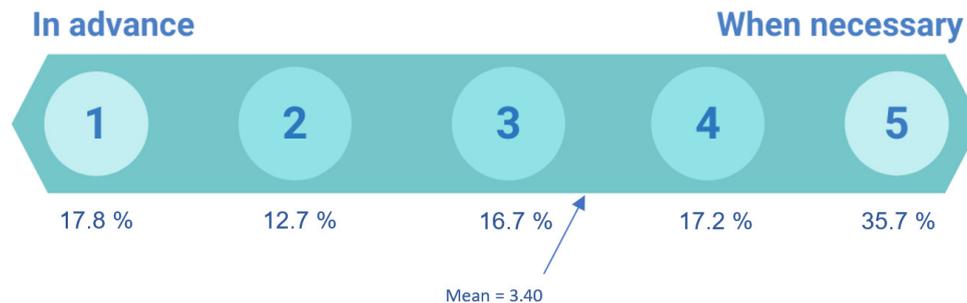
WOULD YOU SHARE WITH US THREE BRANDS YOU USUALLY BUY TIRES FROM, PLEASE?

Then, our respondents were asked to share with us three brands they usually buy tires from. Despite the fact some of them did not provide us with the number of brands we asked them for, the total rank of mentioned brands consisted of 54 brands. From those, we selected 7 most often chosen brands, which were presented in the second wave of the survey in closed-ended question format. This approach led us to a deeper exploration of the preference rank, even when considering popular brands. Overall, the rank is as follows. Regardless of the question format, Michelin definitely conquered the preference rank.

- [1. Michelin \(FR\)](#)
- [2. GoodYear \(USA\)](#)
- [3. Continental \(DE\)](#)
- [4. BKT \(IND\)](#)
- [5. Bridgestone \(JPN\)](#)
- [6. Trelleborg \(SWE\)](#)
- [7. Firestone \(USA\)](#)

HOW OFTEN DO YOU BUY TIRES?

Our last question focused on a situation in which our respondents usually buy new tires. The question itself was conceived as a Likert scale to see whether people usually buy new tires in advance to have some in stock or only when necessary - for example when the conditions of new tires are unbearable and defects begin to appear. The results are presented below indicating about one third of the respondents (35.7%) buys new tires only when necessary - and 17.2% rather when necessary. On the other hand, when considering possible dangerous consequences of riding on old tires, fortunately 17.8% would probably buy new tires in advance and 12.7% rather in advance. Finally, 16.7% of respondents do not have any concrete opinion about tire purchase timing - it probably depends on other situations.

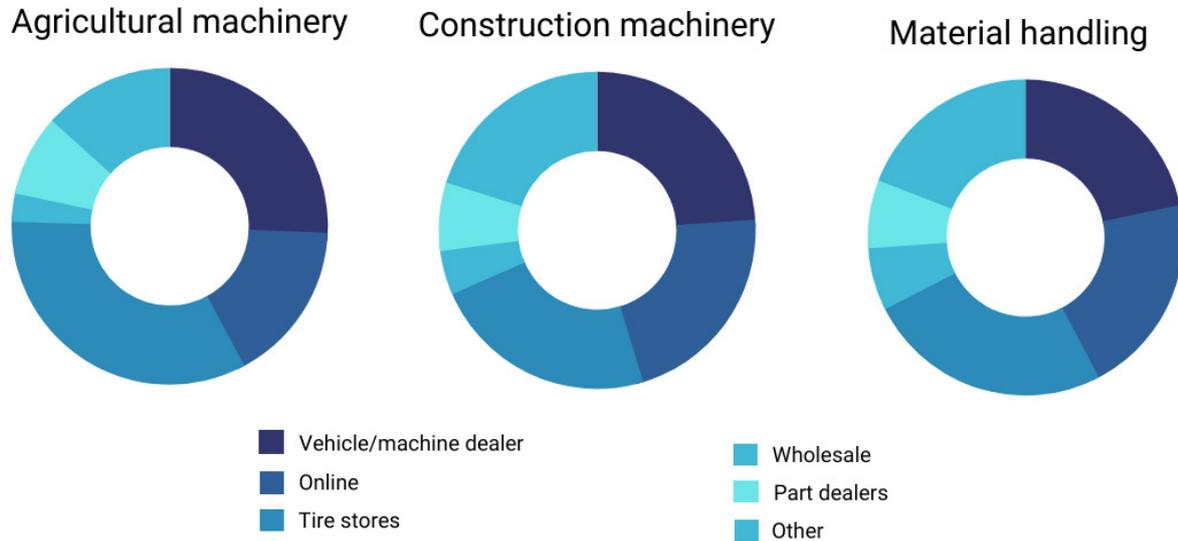


SPECS CATEGORIES

Our next aim was to inspect whether respondents from different industrial sectors have some specifics in their behavior when considering tire purchasing. For that reason, we decided to inspect responses from people filling in the survey on Specs “agriculture machinery”, “construction machinery”, and “material handling” pages (Aerial work platform and Forklifts) separately. When considering the places where people from these categories usually buy new tires, most of the respondents from agricultural machinery (33.3 %) and material handling (25.2%) buy tires from specialized tire stores. Also, respondents from the construction machinery category often buy tires from tire stores (23.1%), although they prefer vehicle/machine dealers (23.9%). It is important to note even respondents from both remaining categories often buy tires from vehicle/machine dealers (Agriculture: 25.7%; Material handling: 21.7%).

In the following options, the responses differ based on the category the respondents are from. For example, respondents from the Material handling category (20.6%) and Construction Category (21.4%) often buy tires online. In contrast, only 16.5% of respondents from the agriculture category buy tires online. The remaining tire sellers were less popular. When considering the wholesale, only 2.9% of respondents from the agriculture category, 4.5% of respondents from the construction category, and 6.4% of respondents from the material handling category would choose this option. The preferences were also lower for part dealers whom only 7% of respondents from the construction and the material handling category, and 8.3% of respondents from the construction category would choose. We also asked our respondents whether they would rather prefer other tire sellers. Interestingly, almost 20% of respondents from the construction and material handling category would buy tires rather than elsewhere compared to 13.4% of respondents from the agriculture category.

Therefore, obviously, there are some differences between these categories, which was confirmed with our statistical analysis indicating these differences are statistically significant.



Furthermore, we focused on differences in tire manufacturers among respondents from different industrial categories. What all categories have in common is the popularity of Michelin. However, in the case of other brands, some differences exist. For example, respondents from the construction and material handling category would favor tires produced by Continental. Respondents from the agriculture category would prefer BKT tires or Trelleborg tires (what lost on the remaining categories). However, except for Michelin, regardless of the industrial category, our respondents also favor Goodyear tires. The rank of the preferences is again presented below. The subsequent analyses are presented in the appendix.

AGRICULTURE

1. Michelin (FR)
2. BKT (IND)
3. GoodYear (USA)
4. Trelleborg (SWE)
5. Continental (DE)
6. Firestone (USA)
7. Bridgestone (JPN)

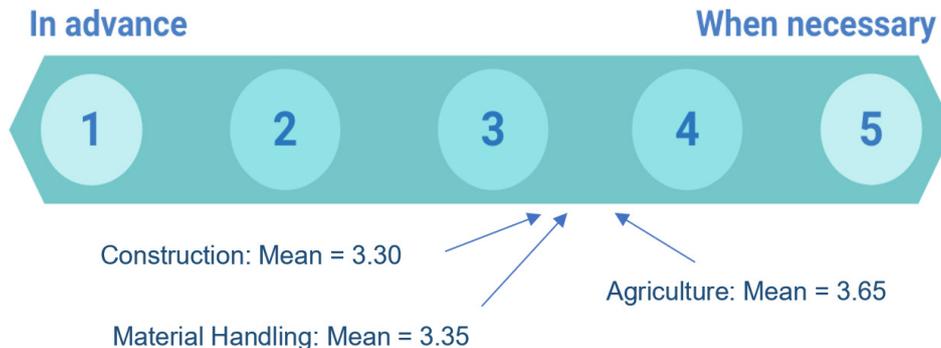
CONSTRUCTION

1. Michelin (FR)
2. GoodYear (USA)
3. Continental (DE)
4. Bridgestone (JPN)
5. BKT (IND)
6. Firestone (USA)
7. Trelleborg (SWE)

MATERIAL HANDLING

1. Michelin (FR)
2. GoodYear (USA)
3. Continental (DE)
4. Bridgestone (JPN)
5. BKT (IND)
6. Firestone (USA)
7. Trelleborg (SWE)

In the end, we compared the attitude of our respondents towards the timing of tire purchase. No statistically significant differences between the respondents from different categories were found. However, obviously, respondents from the agriculture category slightly tend to buy new tires rather when necessary than in advance. The respondents from the construction and material handling category have a slightly more responsible attitude.



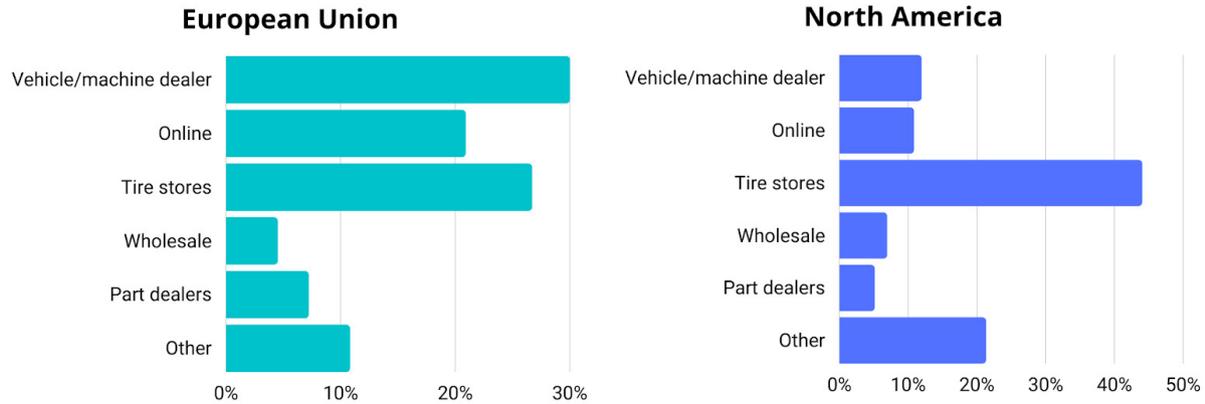
TIRES: Differences Europe/North America

So far the general global results were discussed only. However, as found in previous surveys, usually some nuances exist between European and American respondents' opinions.

WHERE DO YOU USUALLY BUY TIRES?

Keeping this in mind, we analysed whether Europeans and Americans differ in their preferences about tires providers. The results show Europeans for example more often favour vehicle or machine dealers (30.0% compared to 11.9%), online shops (20.9% compared to 10.8%), and part dealers (7.2% compared to 5.1%). The Americans, on the other hand, would rather purchase new tires from specialised tire stores (44% compared to 26.7%), and wholesale (6.9% compared to 4.5%). If possible, Americans would probably choose another option than the options we defined in our survey.

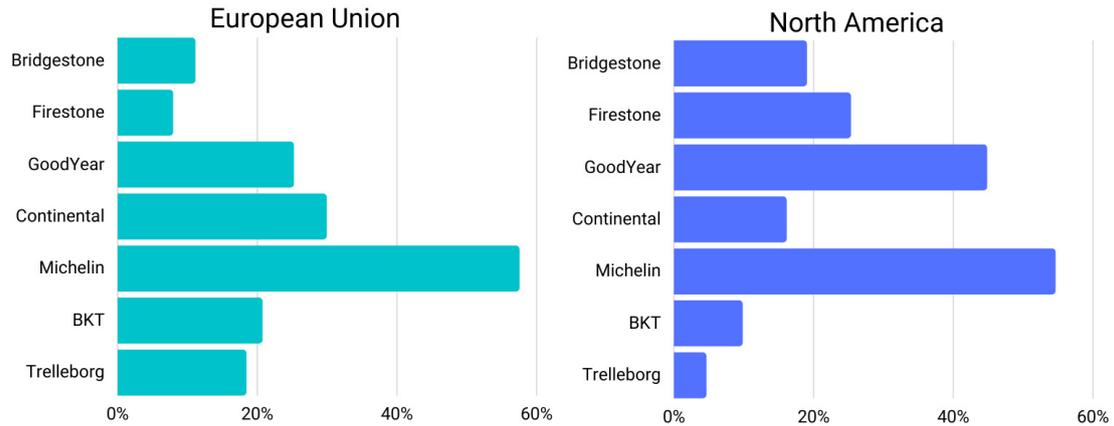
Thanks to further analysis, we moreover found our results are statistically significant with medium effect size. That leads us to conclude the Americans and Europeans really have some specific behavioral patterns when considering new tire purchase. On the other hand, except people's behaviour, the results may be influenced by market conditions, too - for example availability of the services.



WOULD YOU SHARE WITH US THREE BRANDS YOU USUALLY BUY TIRES FROM, PLEASE?

The general global results revealed the most popular brands among our respondents are: Michelin, Goodyear, Continental, BKT, Firestone, Bridgestone, and Trelleborg. Therefore we compared the preferences for these brands on European and American samples.

When focusing only on the current brands, we found statistically significant differences in their preferences. Whereas regardless of the region of origin, the respondents favor Michelin, they have different opinions about the remaining tire manufacturers. Whereas German brand Continental was the second most popular brand in the European sample, the Americans favored Goodyear. Again, the second American brand Firestone was more popular among the Americans, and Swedish Trelleborg and Italian Pirelli were more often chosen among the Europeans. The ranks and graphically visualized preferences are presented below.



EUROPEAN UNION

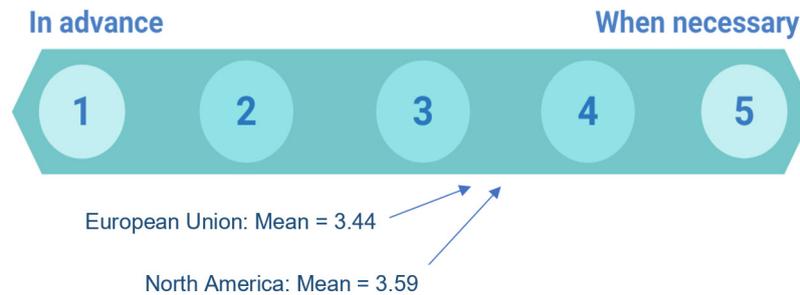
1. Michelin (FR)
2. Continental (DE)
3. GoodYear (USA)
4. BKT (IND)
5. Trelleborg (SWE)
6. Bridgestone (JPN)
7. Firestone (USA)

UNITED STATES & CANADA

1. Michelin (FR)
2. GoodYear (USA)
3. Firestone (USA)
4. Bridgestone (JPN)
5. Continental (DE)
6. BKT (IND)
7. Trelleborg (SWE)

HOW OFTEN DO YOU BUY TIRES?

Then we also inspected purchasing patterns, when do our respondents buy new tires, respectively. However, no statistically significant differences were found between Europeans and Americans. From both of the groups of respondents most of them buy new tires rather when necessary. Although results from our sample revealed the Europeans more often reported they buy new tires in advance.



Conclusion

This survey provided us with interesting information on what factors are important when deciding to buy tires. Nowadays the customers are able to purchase tires from many providers and each of them has some advantages and disadvantages. However, regardless of the respondents' specialization and region of origin, most people would purchase new tires from vehicle/machine dealers or specialized tire stores. On the other hand, wholesale, followed by part dealers, was the least preferred place to buy new tires.

LECTURA Specs guide lists many of the greatest tires manufacturers. Popularity rankings usually agree on Michelin, Continental, GoodYear, or Bridgestone followed by smaller manufacturers. The results of our survey even confirmed these brands' popularity.

However, local rankings may differ in some ways from global numbers due for example accessibility of the manufacturers' services or tendencies to support local economics. On the other hand, globalisation allows even local brands to reach global markets, therefore, the differences between the regions would not be as pronounced as expected. Surprisingly, only Michelin was as much popular among Americans as among Europeans. Our results still indicate statistically significant differences between the European Union and North America.

The last topic we focused on was the timing of the tire purchase. Tires are a large expense on any project. Careful consideration should be given to prevent excessive wear or damage. Many indicators can tell the machine operator the tires have to be replaced - for example the thread depth, the tread wear indicator bar, cracks in

the sidewall, bulgers and blisters on the tire, and too much vibration. Therefore our survey very simply opened this problematic by focusing on whether our respondents buy new tires in advance, to have them prepared in stock in a case of replacement needed, or only when necessary (which means when they see a sign or indicator the tire is too old). Though we did not focus on what indicators guide the respondents to buy new tires, most of our respondents usually buy new tires only when necessary.

APPENDIX

[FIND THE ELABORATED DATA ANALYSES AND RESULTS.](#)

Interested in your individual survey?

Whenever you want to improve and grow your business conducting a survey may help you. Despite the fact that there are plenty of research methods or strategies to understand your customers' behaviour, the easiest way to get information about people is to simply ask them. Understanding your customers' perspective and needs provides you with the most important information about the future development of your business and therefore determining priorities of its direction. Moreover, ongoing communication with your customers and demonstration of the interest in their needs helps maintain their loyalty.

LECTURA can get your survey in front of hundreds of thousands of industry professionals – your potential customers due to our large audience. More than 600,000 professionals research equipment on our ultimate buyer's guide LECTURA Specs every month. Moreover, they are actively engaging with our polls and surveys. More specifically, the engagement is about 4% which results in about 800 daily replies. We provided our clients already with surveys focused on e.g. telematics, spare parts or equipment rating, having collected tens of thousands of answers.

When wondering about the targeting, LECTURA can select your respondents' sample based on some predefined criteria: region/country of origin, industry and type of business. To reach the criteria we are able to target to place your survey on specific web pages only or provide you with 8 language versions – English, German, Spanish, French, Italian, Dutch, Polish and Russian (for English, German, Spanish, French and Polish with translation, too). Moreover, we provide our survey in two formats. In the first one we can show the survey questions in a widget which

'peeps' from the bottom of the page. In the second format potential respondents are provided with a URL which can be given to them directly, such as including it in a newsletter email send out. However, we consider the former as more unobtrusive than the latter. Nevertheless, the final decision depends on your considerations. To make it more specific – the process of research collaboration with LECTURA is as follows. At the beginning we discuss the objectives of the research – who is it for, why, what information do you want to obtain via your survey. When all previously mentioned is clear, you create the questions which we place on the webpages. After some time, the data are collected and it depends on you whether you want to analyse them by yourself (we are able to provide you the raw data in .xls, .sav or .csv format) or let the LECTURA Surveys to analyse them for you and provide you with a comprehensive report of results. More about LECTURA Surveys: <https://www.lectura.de/surveys/>.

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- **COVID survey in cooperation with CECE and ERA**
- **Flash survey: Finance and Leasing**
- **Flash survey: Engines**

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