STUDY OF CONSUMER PREFERENCES OF AUTOMOBILISTS

CX MARKET RESEARCH   CONSULTANCY   CONTROL   DIGITAL TECHNOLOGY

RESEARCH DESCRIPTION

METHOD Anonymous Online Survey (CAWI)

GEOGRAPHY Europe

AUDIENCE Car owners living in Europe

SAMPLE 1024 respondents

DATA COLLECTION PERIOD 15-20 May 2019

CONVENTIONS
☐ statistically significantly higher that 95%
☐ statistically significantly lower at 95%

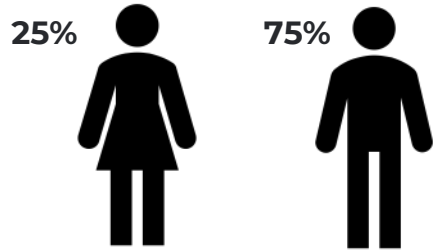**TOP2BOX** % who rated 4 and 5 on a 5-point scale
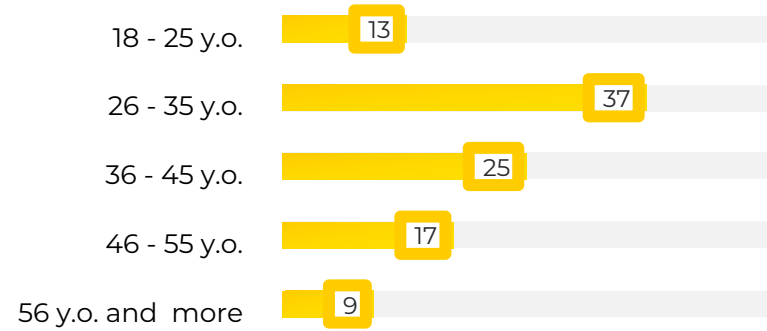
RESEARCH RESULTS

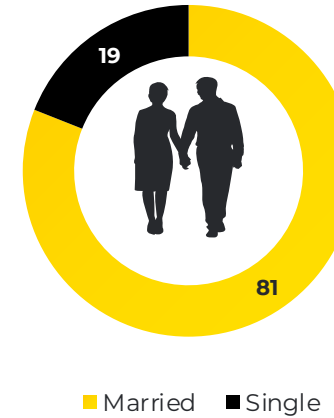# USE OF A CAR

PORTRAIT

%, all respondents

GENDER

25%   75%

AGE

- 18 - 25 y.o. — 13
- 26 - 35 y.o. — 37
- 36 - 45 y.o. — 25
- 46 - 55 y.o. — 17
- 56 y.o. and more — 9

SOCIAL STATUS

19

81

■ Married ■ Single

AVAILABILITY OF CHILDREN

44

56

■ Yes ■ No

INCOME

- 22
- Less than 10 000 UAH — 23
- More than 10 000, but less than 15 000 UAH — 18
- More than 15,000, but less than 20,000 UAH — 10
- More than 20,000, but less than 25,000 UAH — 7
- More than 25,000, but less than 30,000 UAH — 9
- More than 30,000 — 11
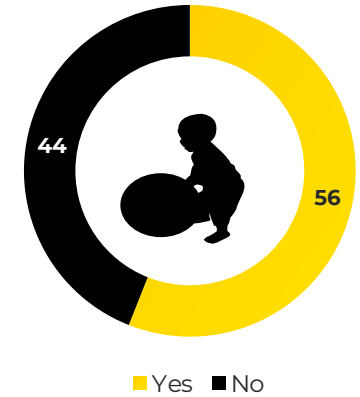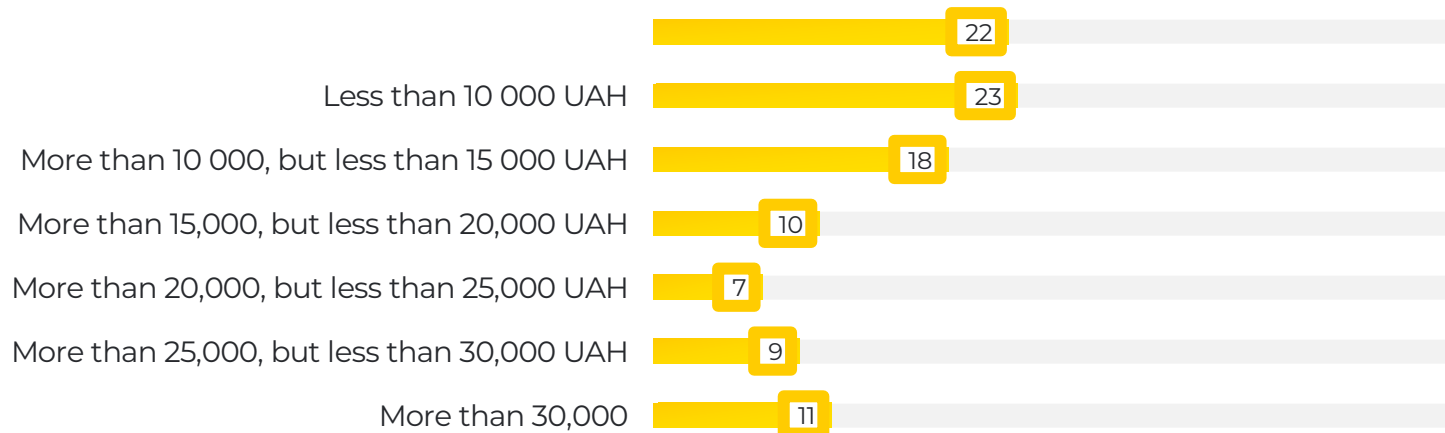
DECISION ON THE FILLING PLACE

35

65

■ personally me

■ I share with other family members
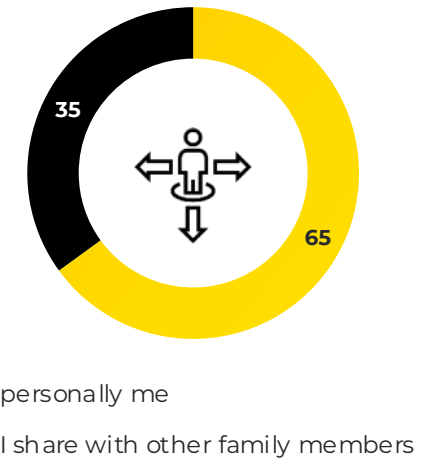
VEHICLE

%, all respondents

BRAND

Brand	Value
Inexpensive cars*	22
Renault	8
Volkswagen	6
Ford	6
Skoda	4
Hyundai	4
Chevrolet	4
Opel	4
Nissan	4
Kia	4
Mitsubishi	3
Toyota	3
Citroen	3
Fiat	3
Mercedes	3
Geely	2
Mazda	2
Audi	2
BMW	2
Chery	2
Dacia	2
Peugeot	2
Honda	1
Suzuki	1
Subaru	1
Seat	1

ENGINE TYPE
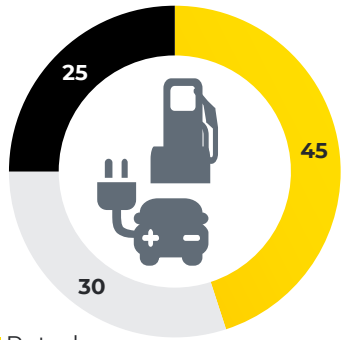
- 45 Petrol
- 30 Gasoline with compressed gas equipment
- 25

YEAR OF MANUFACTURE

Year	Value
Up to 2000	19
2000-2005	17
2006-2010	36
2011-2015	23
2016+	6

HOW FAR

Distance	Value
> 50 km	5
50 - 100 km	20
100 - 500 km	56
500 - 700 km	13
< 700 km	7
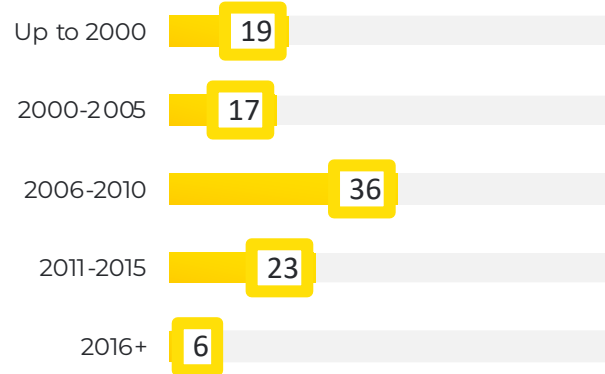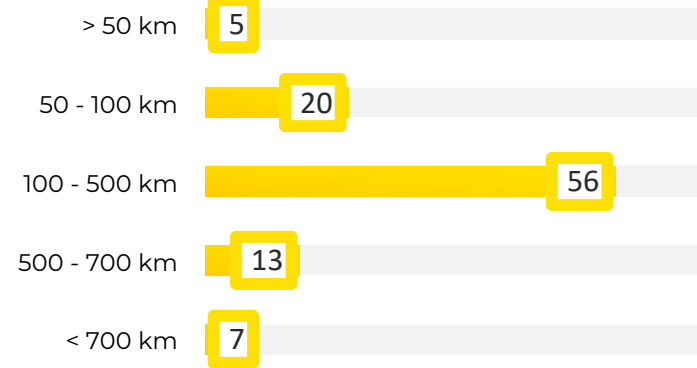
Q1. What is the manufacture year of your car? Q2. What is the brand of this car ? Q3. What type of engine is installed on your car? Q4. How many kilometers do you travel on average per week? This refers to the total mileage that the car passes.

USE OF FILLING STATIONS

Scheduling
WORLDWIDE

FUELLING STATIONS

%, all respondents

Location of filling

55
41
3
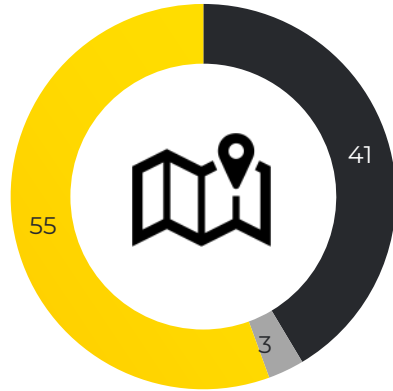
■ In the city

Volume of fuel tank

I usually fill up to a full tank	31
10 liters or less	19
20 liters	31
30 liters	12
40 liters and more	5

Refueling Frequency

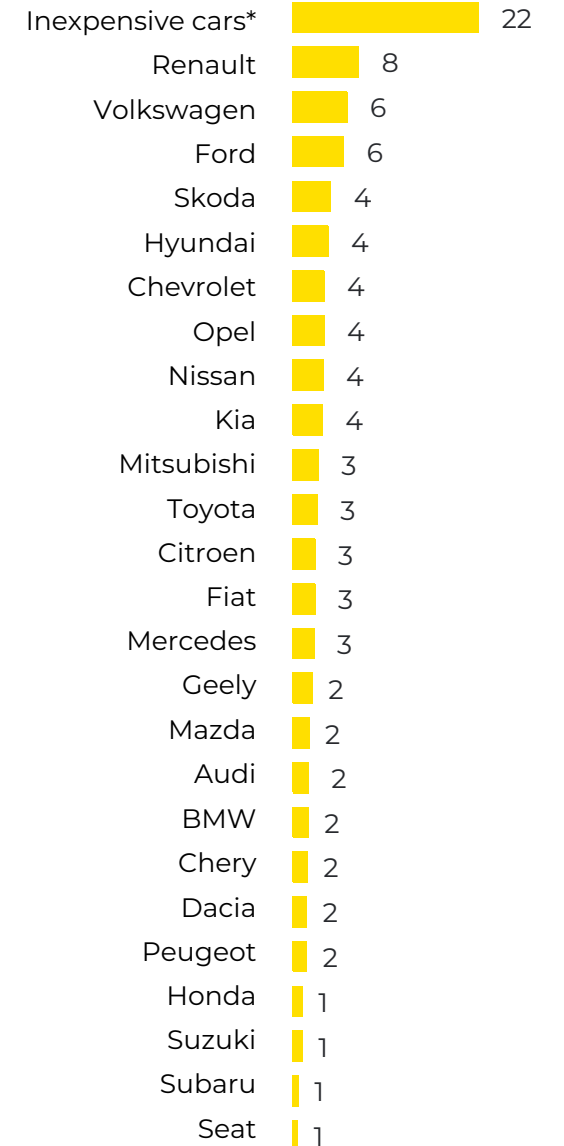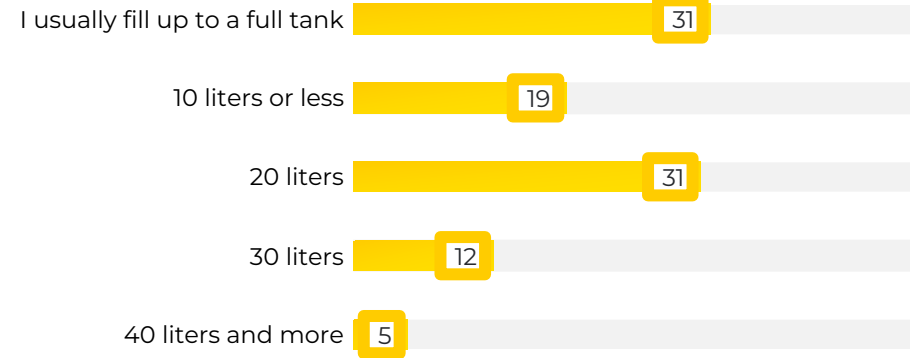|	
Once a week and more often	55
2-3 times a month	38
1 time per month	7

Food purchase

26
74

■ Yes
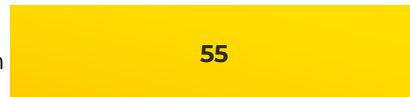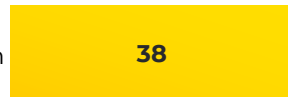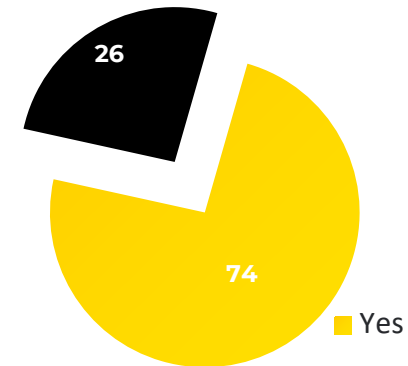
Q5. How often do you refuel your car? Q6. How many liters do you usually refuel? Q12. What gas stations do you regularly refuel at? E1. What, besides fuel, do you usually still buy at gas stations? E0. Do you buy food (hot dogs, burgers, coffee, tea, etc.) at the gas station?
E2. What kind of food do you buy at the gas station?

WHAT LOCATION?

%, all respondents
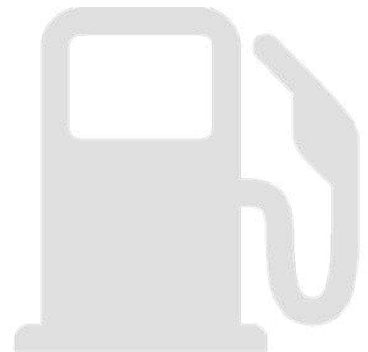
Popular filling stations / TOP-11
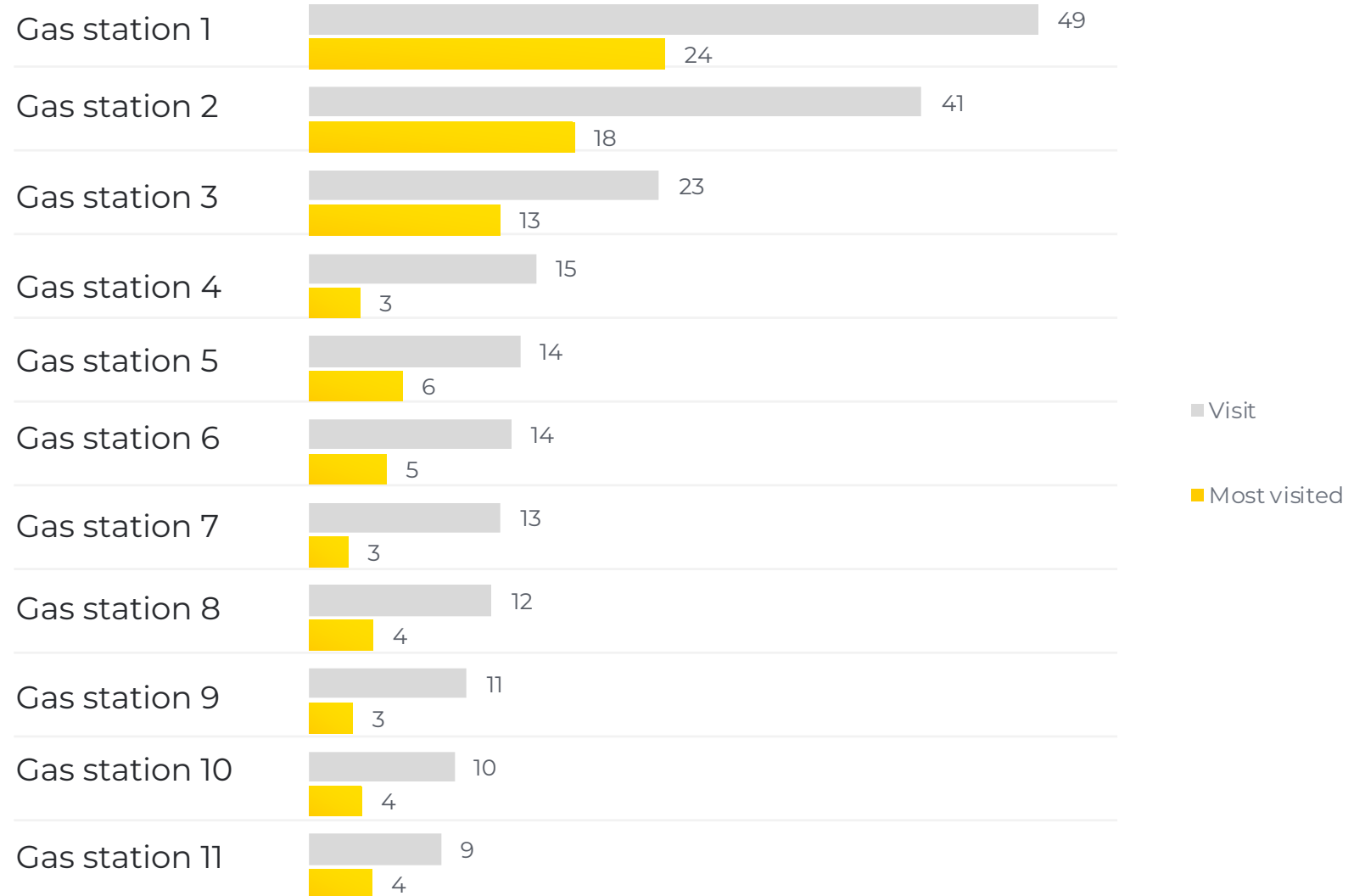
Gas station	Visit	Most visited
Gas station 1	49	24
Gas station 2	41	18
Gas station 3	23	13
Gas station 4	15	3
Gas station 5	14	6
Gas station 6	14	5
Gas station 7	13	3
Gas station 8	12	4
Gas station 9	11	3
Gas station 10	10	4
Gas station 11	9	4

■ Visit

■ Most visited

Q7. At which gas stations have you refueled your car in the last 3 months? Q8. At which gas station do you refuel your car most often? Why do you choose this particular gas station?

WHAT LOCATION/ TOR-11 VISITED GAS STATIONS: AUTO YEAR OF MANUFACTURE

%, all respondents

	General	Older then 2000	2000-2005	2006-2010	2011 - 2015	2016+
Gas station 1	49 / 24	38 / 16	51 / 26	48 / 21	56 / 32	54 / 26
Gas station 2	41 / 18	40 / 10	40 / 16	38 / 17	46 / 24	50 / 28
Gas station 3	23 / 13	23 / 11	27 / 15	26 / 15	20 / 10	13 / 5
Gas station 4	15 / 3	9 / 3	20 / 7	14 / 3	18 / 3	14 / 2
Gas station 5	14 / 6	27 / 14	13 / 2	13 / 7	8 / 3	7 / 4
Gas station 6	14 / 5	18 / 9	13 / 5	14 / 7	9 / 2	11 / -
Gas station 7	13 / 3	7 / 2	13 / 3	14 / 2	15 / 3	14 / 4
Gas station 8	12 / 4	18 / 7	15 / 4	10 / 3	9 / 4	11 / 7
Gas station 9	11 / 3	8 / 3	13 / 5	10 / 2	13 / 3	9 / 2
Gas station 10	10 / 4	10 / 6	6 / 1	10 / 4	10 / 3	16 / 2
Gas station 11	9 / 4	3 / 1	8 / 2	10 / 5	12 / 6	14 / 7

Visit (yellow) ■ Visit often (black)

Base: All respondents N = 1024, Up to 2000 N = 192, 2000 - 2005 N = 172, 2006 - 2010 N = 368, 2011 - 2015 N = 235, 2016+ N = 57

Q7. At which gas stations have you refueled your car in the last 3 months?

Q8. At which gas station do you refuel your car most often? Why do you choose this particular gas station?

⌐ statistically significant differences at 95% level

Brand force matrix: choice of majority vs. Number of gas stations in the networks
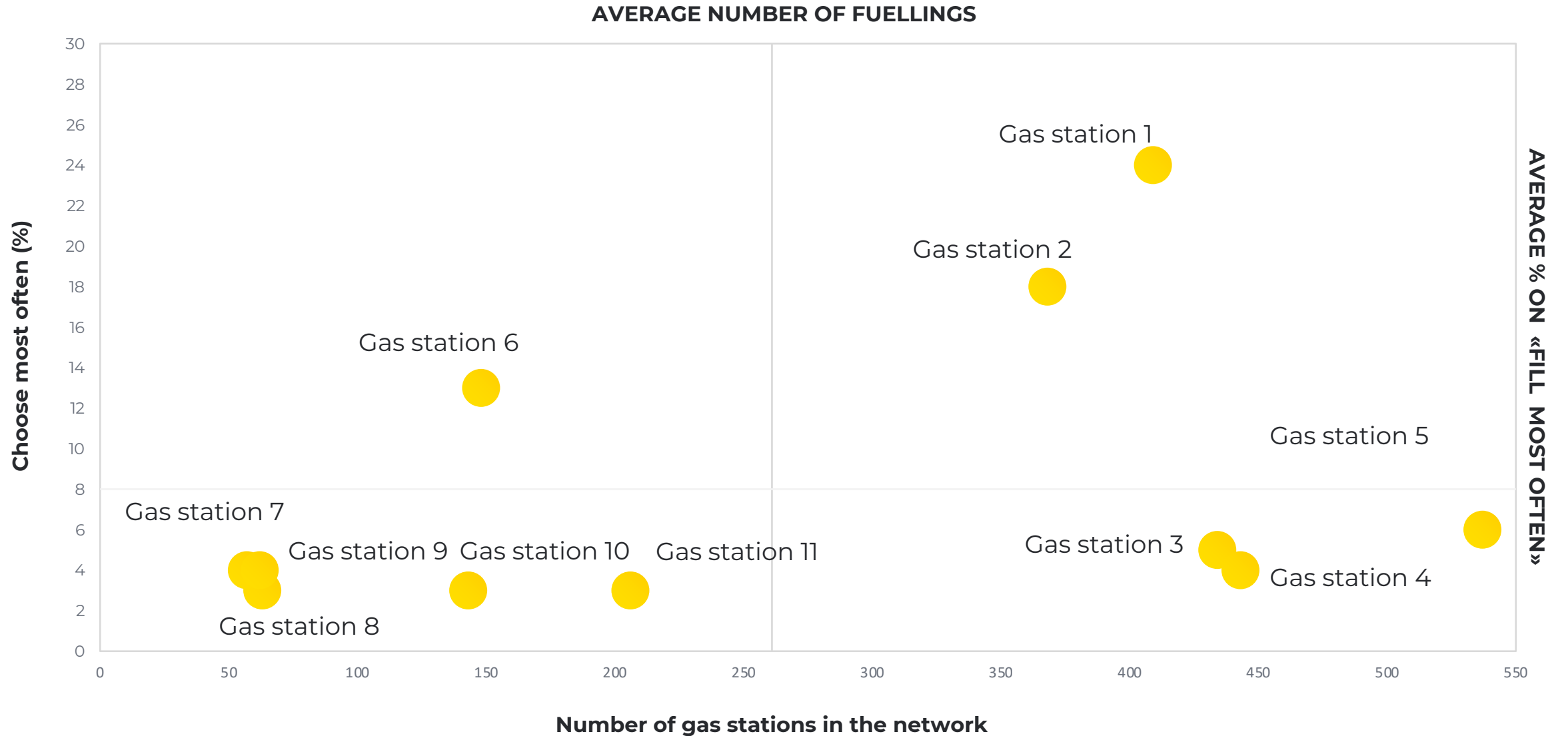
AVERAGE NUMBER OF FUELLINGS

REASONS FOR CHOOSING

%, all respondents

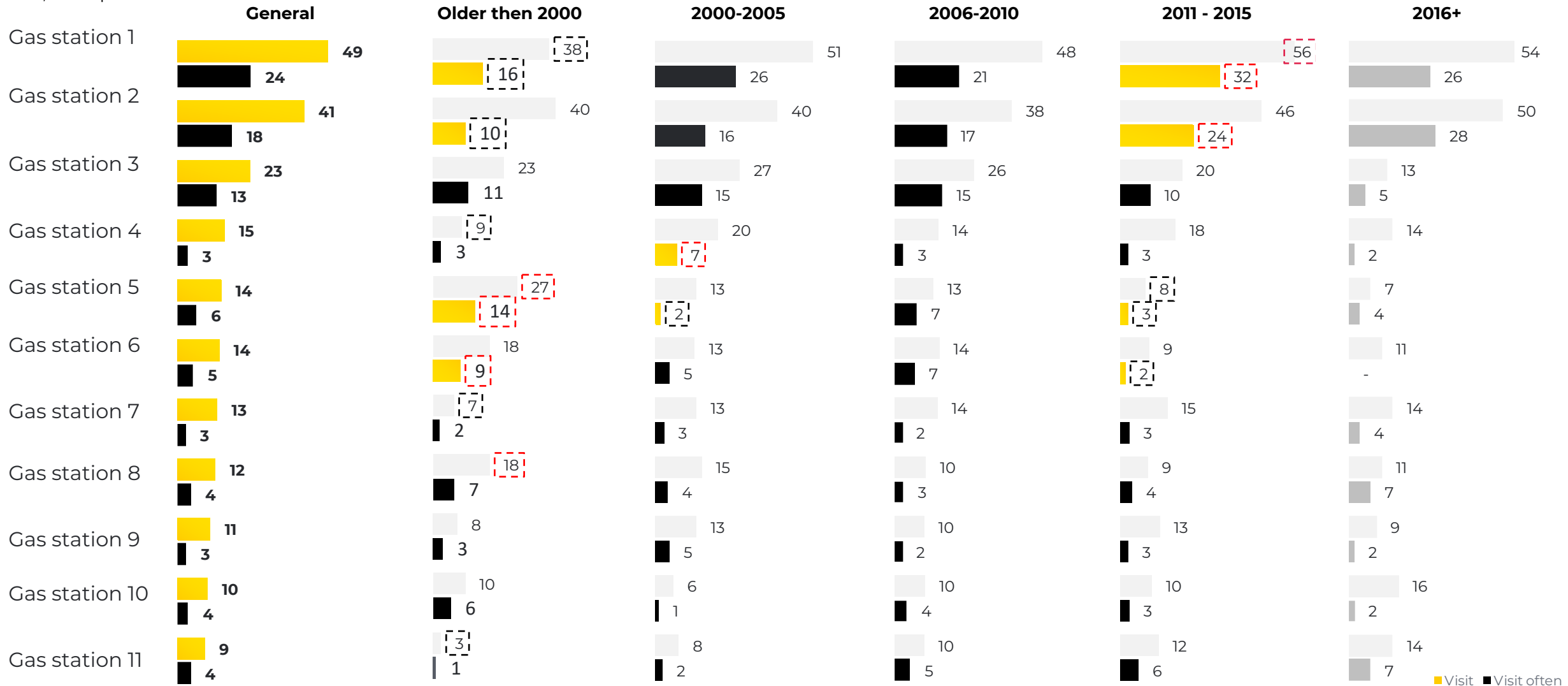|	All respondents	Gas station 1	Gas station 2	Gas station 3	Gas station 4	Gas station 5
High quality fuel	50	59	66	34	71	16
Convenient location	26	24	17	20	17	42
Price	21	7	4	43	6	39
Service	18	24	29	15	23	5
Promotions, discounts	10	8	9	19	9	
Loyalty program	8	11	10	10		
Price-quality ratio	7	2	4	15	3	14
Comfortable conditions / add. services	2	3	3	2		
Tasty food, coffee	2	2	4	1		

Q7. At which gas stations have you refueled your car in the last 3 months?
Q8. At which gas station do you refuel your car most often?
Why do you choose this particular gas station?

statistically significant differences at 95% level

REASONS FOR CHOOSING
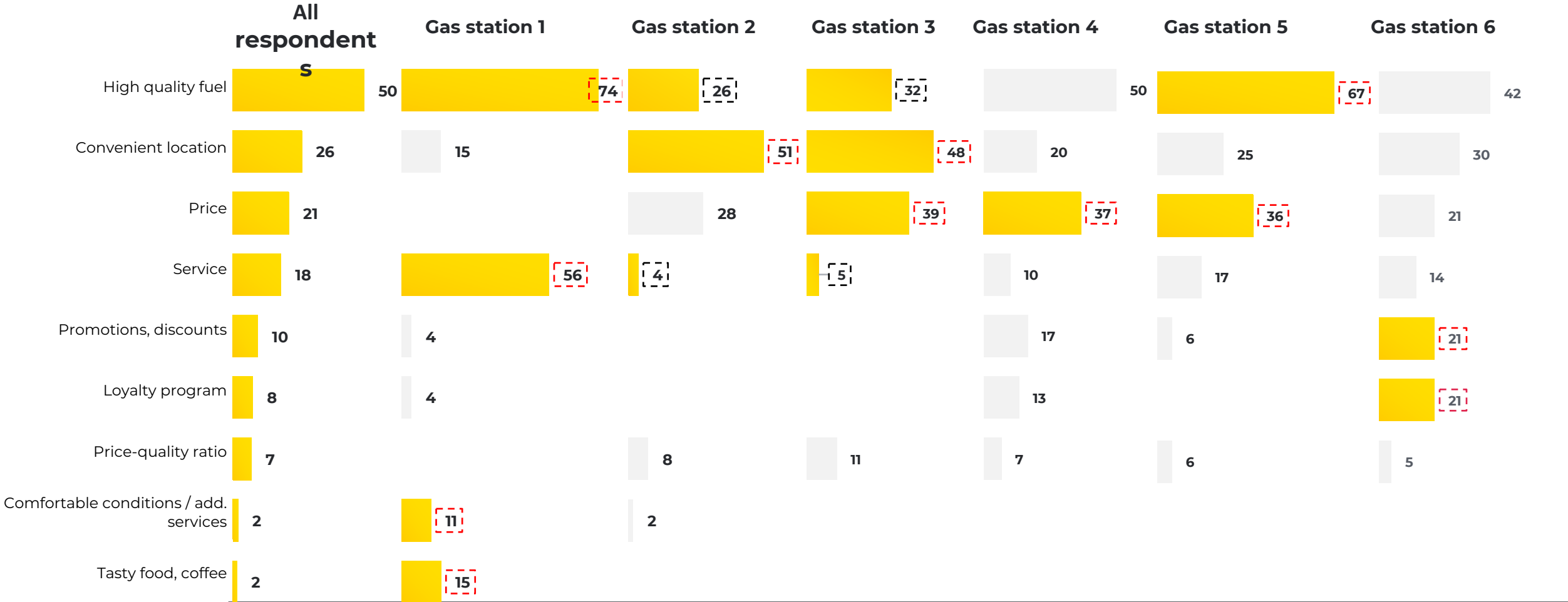
%, all respondents

	All respondents	Gas station 1	Gas station 2	Gas station 3	Gas station 4	Gas station 5	Gas station 6
High quality fuel	50	74	26	32	50	67	42
Convenient location	26	15	51	48	20	25	30
Price	21		28	39	37	36	21
Service	18	56	4	5	10	17	14
Promotions, discounts	10	4			17	6	21
Loyalty program	8	4			13		21
Price-quality ratio	7		8	11	7	6	5
Comfortable conditions / add. services	2	11	2				
Tasty food, coffee	2	15					

Q7. At which gas stations have you refueled your car in the last 3 months?
Q8. At which gas station do you refuel your car most often?
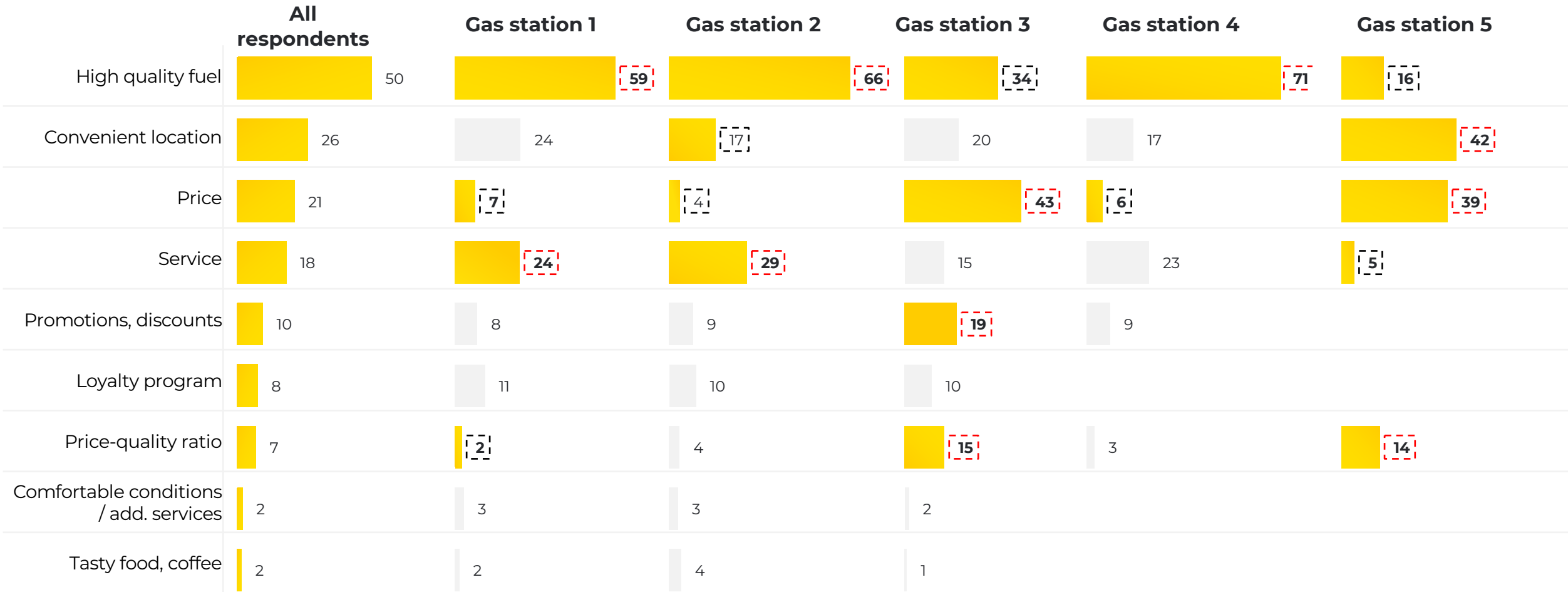Why do you choose this particular gas station?

statistically significant differences at 95% level

NPS (Net Promoted Score)

	NPS		Critics	Passives	Promoters
Market average	54		10	26	64
Gas station 1	65		6	23	71
Gas station 2	65		4	26	69
Gas station 3	74		7	11	81
Gas station 4	28		20	31	48
Gas station 5	19		25	32	43
Gas station 6	25		23	30	48

■ Critics   ■ Passives   □ Promoters

NPS (Net Promoted Score) = % Promoters - % Critics

statistically significant differences at 95% level

CRITERIA FOR CHOOSING A GAS STATION

BEHAVIORAL PATTERNS WHEN CHOOSING A GAS STATION

%top2box, all respondents

	Top2box, %	Means		Top2box, %	Means
I refuel only at those gas stations in petrol quality of which I am sure	91	4,6	I choose the gas station according to the route, where it is more convenient - there I refuel	57	3,5
I refuel only at network gas stations, I avoid "barrels" and dubious gas stations	89	4,6	I refuel at the gas stations of the only one network	50	3,4
I choose only those gas stations that do not cheat on displacement	88	4,5	I choose a gas station that has the most profitable loyalty program	49	3,4
The level of service at the gas station is important to me	79	4,3	Refueling a car is also an opportunity to have a snack, I choose those gas stations where the food and drinks are delicious	41	3,0
There are several gas stations to which I trust – I refuel only at them	77	4,1	I check the prices, refuel where it's cheaper	31	2,8
I always plan in advance where I will refuel	69	3,9	Spontaneously make a decision about fueling	12	1,9
I choose a gas station where I can pay by credit card	64	3,8	I am always in a hurry, I choose a gas station where there are no queues	9	1,9

Q11. Which of the following statements describes your behavior in the best way when choosing a gas station? Rate each parameter from 1 to 5, where 1 - completely disagree / never do this, 5 - completely agree / always do this.

BEHAVIORAL PATTERNS WHEN CHOOSING A FILLING STATION: GENDER

%top2box, all respondents

I always plan in advance where I will refuel
- 74
- 62

I choose a gas station where you can pay with a credit card
- 60
- 70

I look at prices, refuel where it's cheaper
- 29
- 35

Spontaneously make a fueling decision
- 10
- 15

Q11. Which of the following statements describes your behavior in the best way when choosing a gas station? Rate each parameter from 1 to 5, where 1 - completely disagree / never do this, 5 - completely agree / always do this.
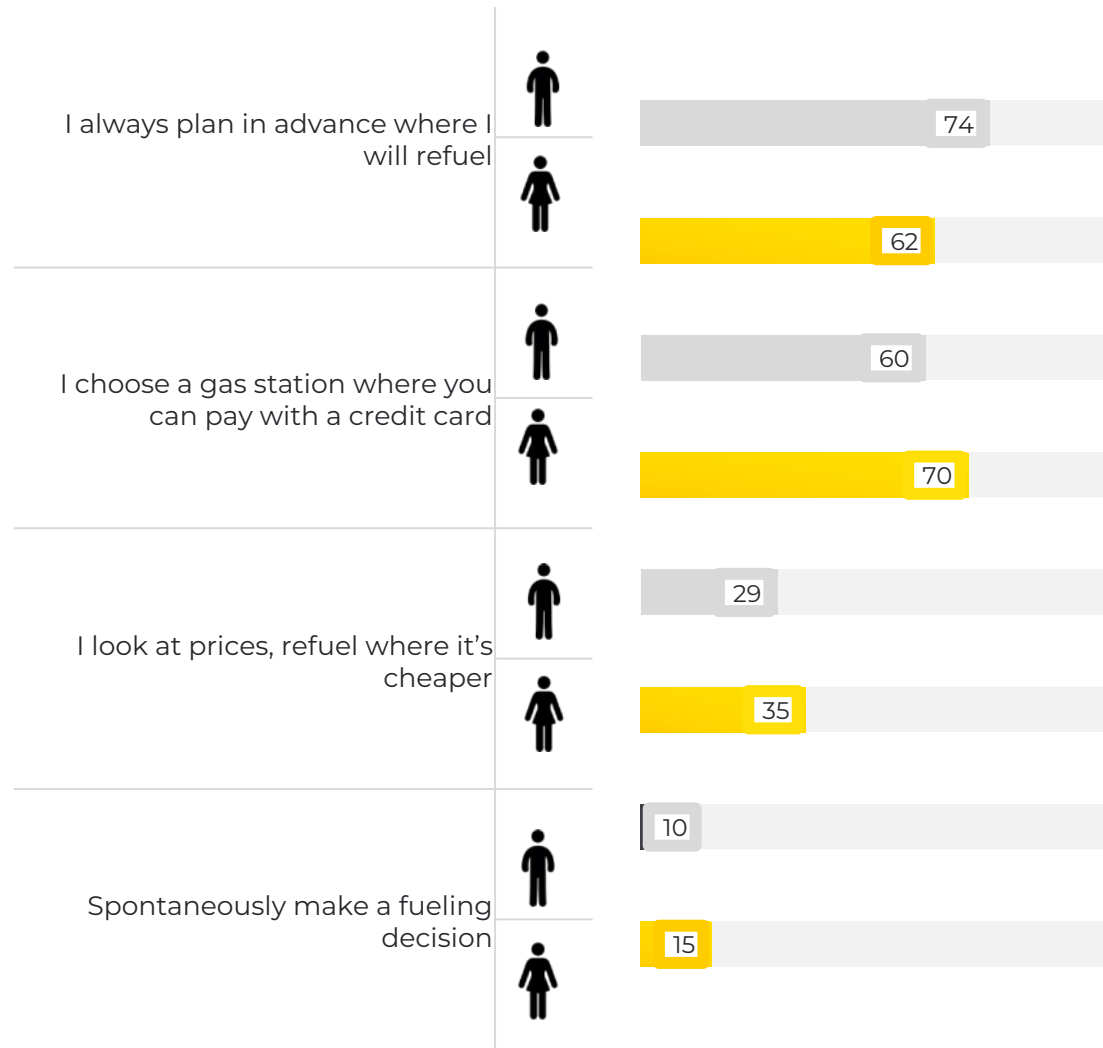
statistically significant differences at 95% level

BEHAVIORAL PATTERNS WHEN CHOOSING A GAS STATION: KILOMETERS PER WEEK

%top2box, all respondents

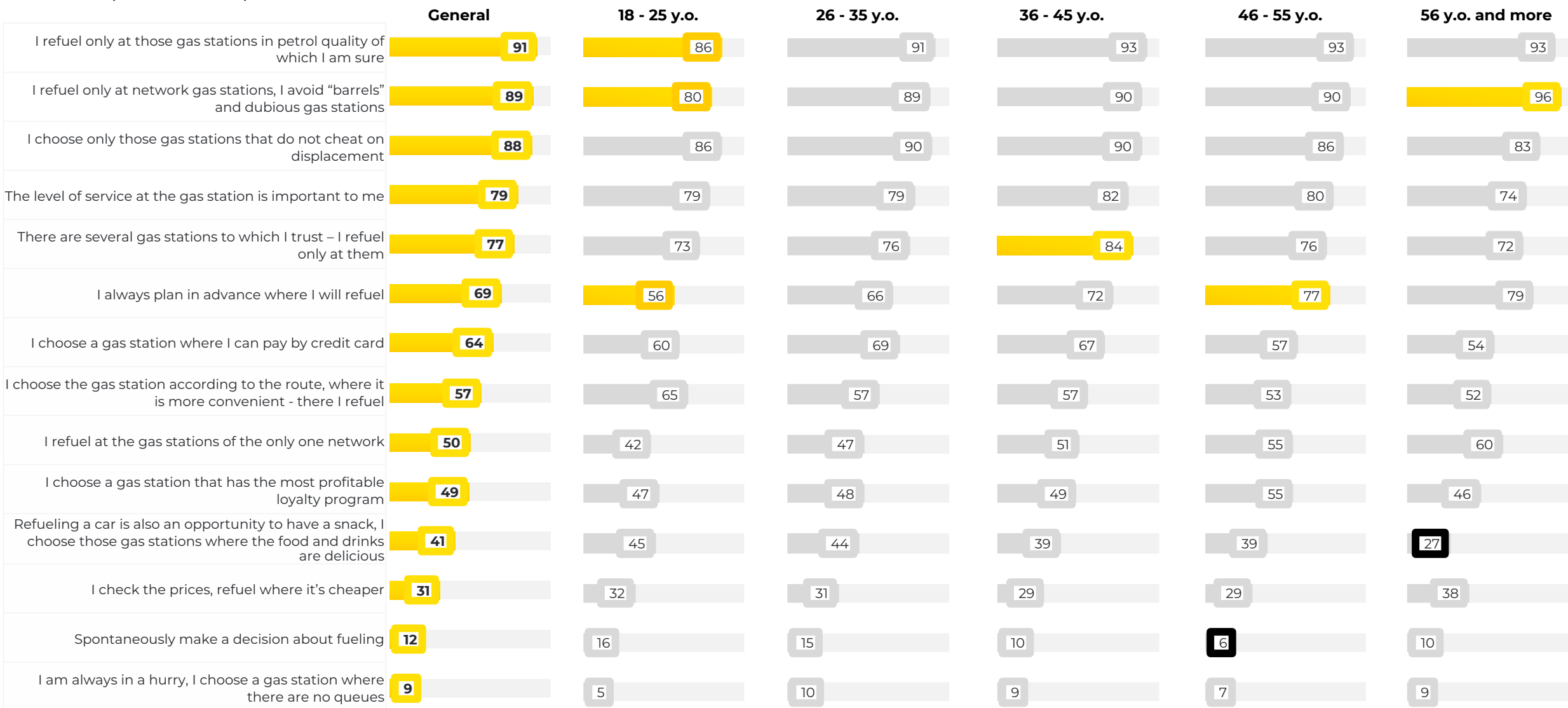|	General	Up to 50 km	50 - 100 km	100 – 500 km	500 – 700 km	More than 700 km
I refuel only at those gas stations in petrol quality of which I am sure	91	91	88	92	94	93
I refuel only at network gas stations, I avoid "barrels" and dubious gas stations	89	89	91	88	91	87
I choose only those gas stations that do not cheat on displacement	88	87	89	88	89	90
The level of service at the gas station is important to me	79	70	78	80	81	82
There are several gas stations to which I trust – I refuel only at them	77	66	73	79	83	68
I always plan in advance where I will refuel	69	72	71	70	67	65
I choose a gas station where I can pay by credit card	64	62	66	64	62	68
I choose the gas station according to the route, where it is more convenient - there I refuel	57	60	61	56	55	53
I refuel at the gas stations of the only one network	50	36	52	50	51	51
I choose a gas station that has the most profitable loyalty program	49	47	43	51	53	41
Refueling a car is also an opportunity to have a snack, I choose those gas stations where the food and drinks are delicious	41	19	32	41	51	54
I check the prices, refuel where it's cheaper	31	62	34	29	28	29
Spontaneously make a decision about fueling	12	4	11	12	15	10
I am always in a hurry, I choose a gas station where there are no queues	9	9	10	8	8	7

Q11. Which of the following statements describes your behavior in the best way when choosing a gas station? Rate each parameter from 1 to 5, where 1 - completely disagree / never do this, 5 - completely agree / always do this.

statistically significant differences at 95%

BEHAVIORAL PATTERNS WHEN CHOOSING A GAS STATION: AGE

%top2box, all respondents

	General	18 - 25 y.o.	26 - 35 y.o.	36 - 45 y.o.	46 - 55 y.o.	56 y.o. and more
I refuel only at those gas stations in petrol quality of which I am sure	91	86	91	93	93	93
I refuel only at network gas stations, I avoid "barrels" and dubious gas stations	89	80	89	90	90	96
I choose only those gas stations that do not cheat on displacement	88	86	90	90	86	83
The level of service at the gas station is important to me	79	79	79	82	80	74
There are several gas stations to which I trust – I refuel only at them	77	73	76	84	76	72
I always plan in advance where I will refuel	69	56	66	72	77	79
I choose a gas station where I can pay by credit card	64	60	69	67	57	54
I choose the gas station according to the route, where it is more convenient - there I refuel	57	65	57	57	53	52
I refuel at the gas stations of the only one network	50	42	47	51	55	60
I choose a gas station that has the most profitable loyalty program	49	47	48	49	55	46
Refueling a car is also an opportunity to have a snack, I choose those gas stations where the food and drinks are delicious	41	45	44	39	39	27
I check the prices, refuel where it's cheaper	31	32	31	29	29	38
Spontaneously make a decision about fueling	12	16	15	10	6	10
I am always in a hurry, I choose a gas station where there are no queues	9	5	10	9	7	9

Q11. Which of the following statements describes your behavior in the best way when choosing a gas station? Rate each parameter from 1 to 5, where 1 - completely disagree / never do this, 5 - completely agree / always do this.

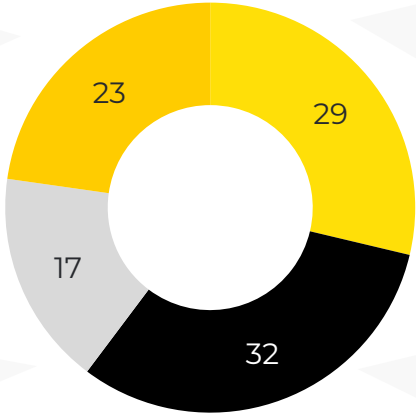statistically significant differences at 95% level

VECTORS OF BEHAVIORAL PATTERNS

The table is obtained as a result of applying factor analysis. **Factor analysis** is a multidimensional method used to study the relationships between the values of variables.

	Trust	Loyalty	Rationalism	Serviceability
I refuel only at those gas stations in petrol quality of which I am sure	■	■		
I choose only those gas stations that do not cheat on displacement volume	■	■		
I refuel only at network gas stations, I avoid "barrels" and dubious gas stations	■	■		
There are several gas stations to which I trust – I refuel only at them	■	■		
I always plan in advance where I will refuel	■	■		
Spontaneously make a decision about fueling	■	■		
I refuel at the gas station only one network	■	■		
I check the prices, refuel where it's cheaper			■	
I choose the gas station according to the route, where it is more convenient - there I refuel			■	
I choose a gas station that has the most profitable loyalty program			■	
I am always in a hurry, I choose a gas station where there are no queues			■	
Refueling a car is also an opportunity to have a snack, I choose those gas stations where the food and drinks are delicious				
The level of service at the gas station is important to me				
I choose a gas station where I can pay by credit card				

BEHAVIORAL PATTERNS WHEN CHOOSING A GAS STATION

Service Oriented
Distinctive features:
- Women (48%)
- 26 - 45 years old (80%)
- Refuel at gas stations on the highways (65%)
- Often buy food (93%), soft drinks (71%), hot dogs (81%)
- refuel at least 1 time per week (63%)

Prefer:
- several trusted gas stations located along the highway
- Gas station with a good level of service
- Gas station with delicious food and drinks
- Gas stations with profitable loyalty programs

Brand oriented
Distinctive features:
- Men (69%)
- 46 years old (44%)

Prefer:
- one "favorite" gas station
- at gas stations with trusted gasoline quality
- at the gas station where you are not cheated
- only at network gas stations (avoid no name ones)

SEGMENTATION

Legend:
- Brand oriented
- Rationalists
- Time connoisseurs
- Service Oriented

Values: 23, 29, 32, 17

Time valuer
Distinctive features:
- 18-25 years (20%)
- refuel at least 1 time per week (62%)

Prefer:
- make a spontaneous decision to refuel
- gas stations without queues, because they are always in a hurry

Rationalists
Distinctive features:
- refuel only at city gas stations (47%)
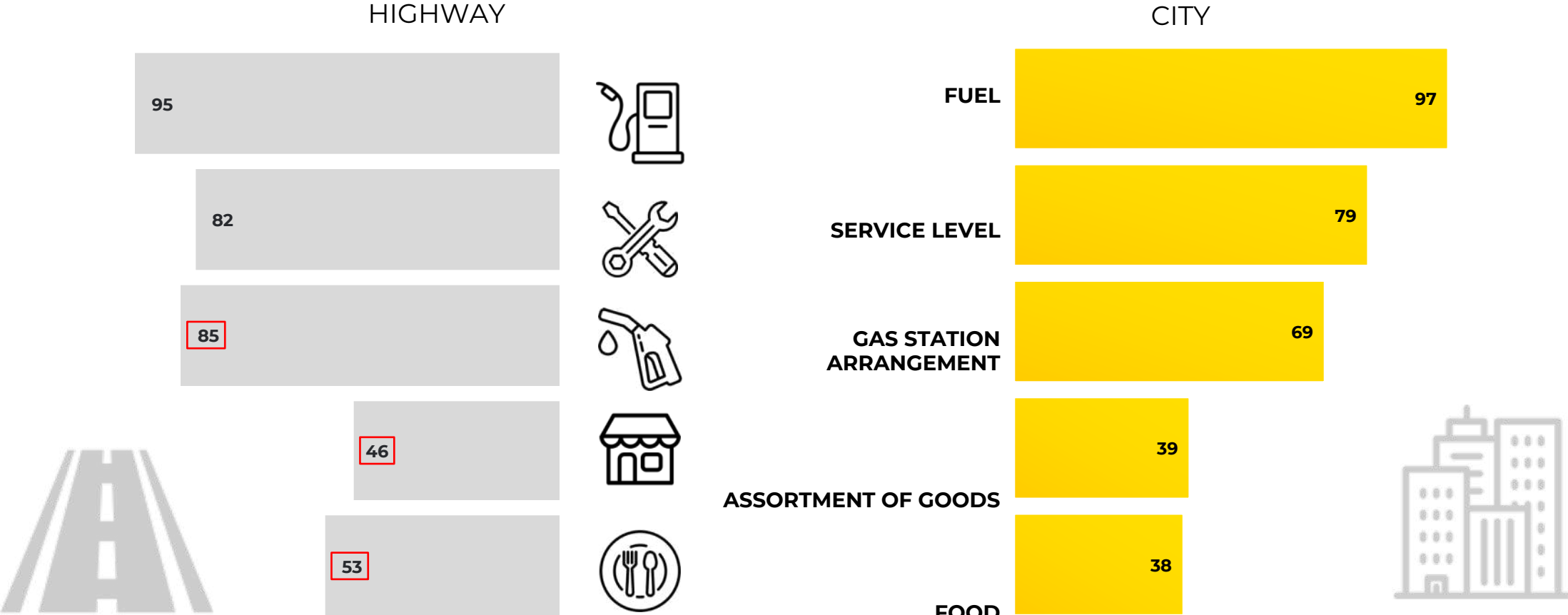- do not make additional purchases (35%)
- do not buy food (41%)

Prefer:
- monitor prices and refuel where it is cheaper
- Plan in advance the filling

IMPORTANCE OF MAJOR CRITERIA FOR CHOICE OF GAS STATIONS

Top2box%, all respondents

HIGHWAY

- **FUEL** — 95
- **SERVICE LEVEL** — 82
- **GAS STATION ARRANGEMENT** — 85
- **ASSORTMENT OF GOODS** — 46
- **FOOD** — 53

CITY

- **FUEL** — 97
- **SERVICE LEVEL** — 79
- **GAS STATION ARRANGEMENT** — 69
- **ASSORTMENT OF GOODS** — 39
- **FOOD** — 38

☐ statistically significant differences at 95% level

Q13. If the gas station is located on the highway, evaluate the importance of each parameter for you. To assess, use a 5-point scale, where 1 is absolutely not important, 5 is very important.
Q14. If the gas station is located in the city, evaluate the importance of each parameter for you. To assess, use a 5-point scale, where 1 is absolutely not important, 5 is very important
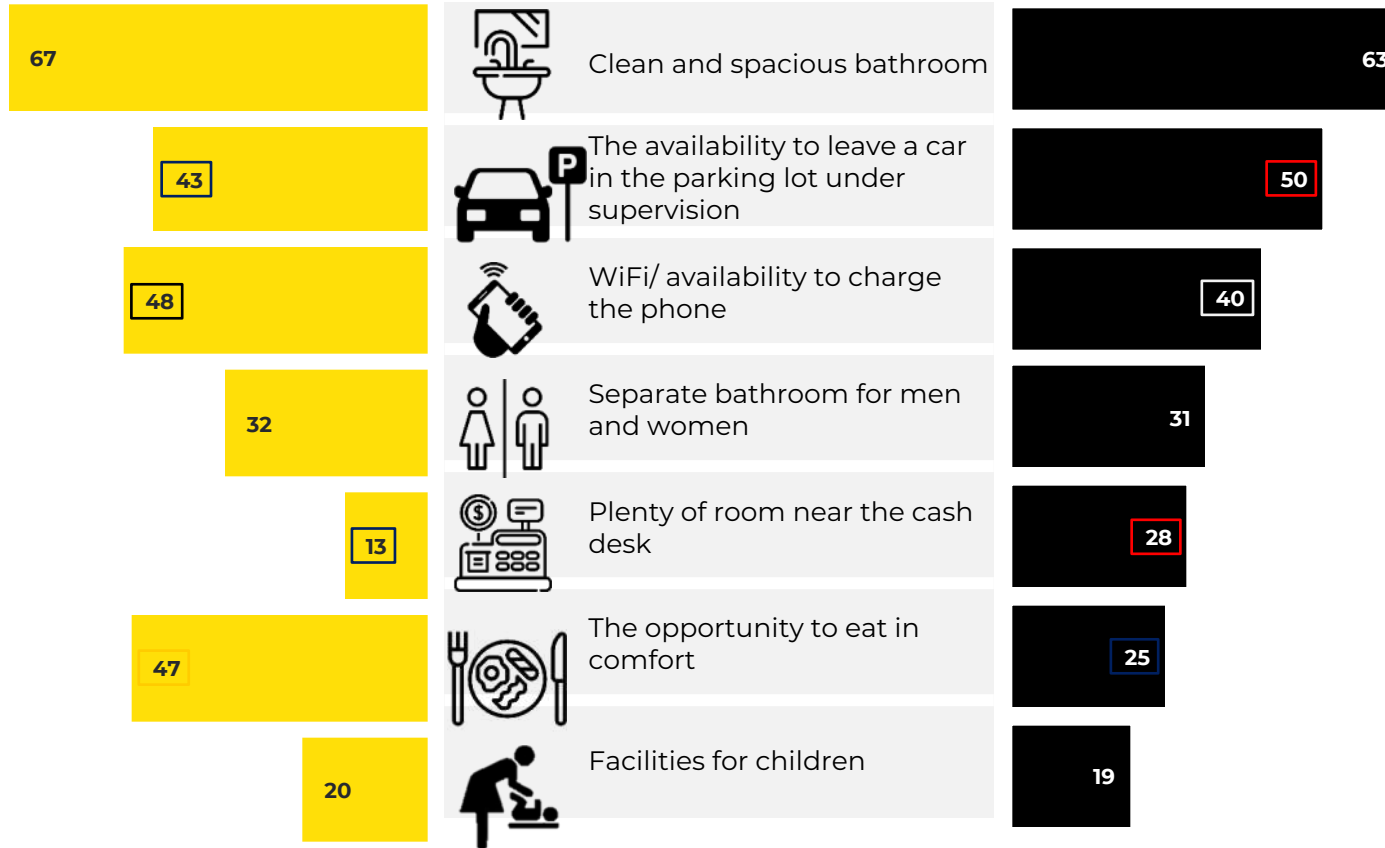
GAS STATION ARRANGEMENT

%, all respondents

REQUIRED ATTRIBUTES

HIGHWAY

CITY

Attribute	Highway	City
Clean and spacious bathroom	67	63
The availability to leave a car in the parking lot under supervision	43	50
WiFi/ availability to charge the phone	48	40
Separate bathroom for men and women	32	31
Plenty of room near the cash desk	13	28
The opportunity to eat in comfort	47	25
Facilities for children	20	19

Q15. Which of the following, in your opinion, must be at the gas station on the highway.
Q16. Which of the following, in your opinion, must be at a gas station in the city.

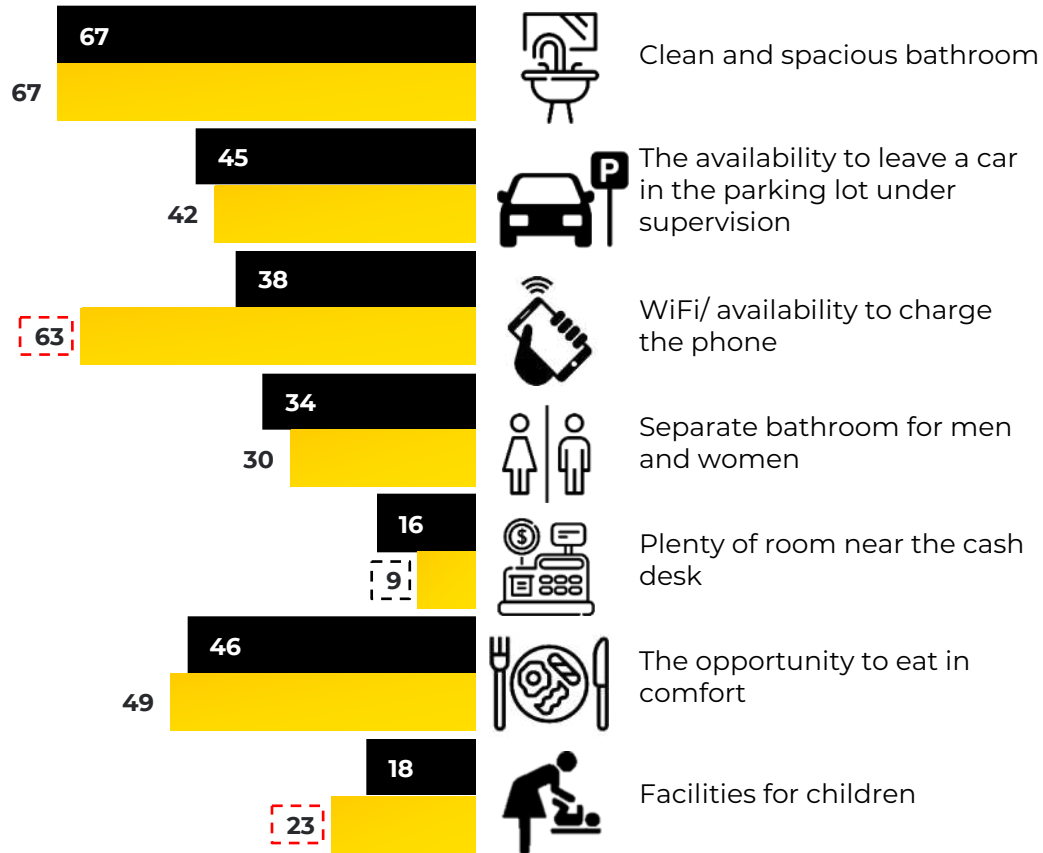statistically significant differences at the 95% level between city gas stations and gas stations o the highway

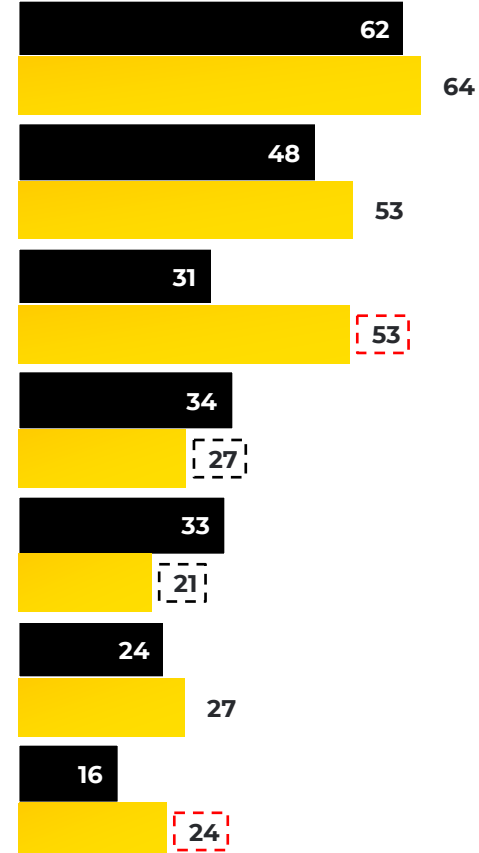# GAS STATION ARRANGEMENT: GENDER

%, all respondents

REQUIRED ATTRIBUTES

HIGHWAY

CITY

Attribute	HIGHWAY Men	HIGHWAY Women	CITY Men	CITY Women
Clean and spacious bathroom	67	67	62	64
The availability to leave a car in the parking lot under supervision	45	42	48	53
WiFi/ availability to charge the phone	38	63	31	53
Separate bathroom for men and women	34	30	34	27
Plenty of room near the cash desk	16	9	33	21
The opportunity to eat in comfort	46	49	24	27
Facilities for children	18	23	16	24

■ Men ■ Women

Q15. Which of the following, in your opinion, must be at the gas station on the highway.
Q16. Which of the following, in your opinion, must be at a gas station in the city.

statistically significant 95% differences between women and men
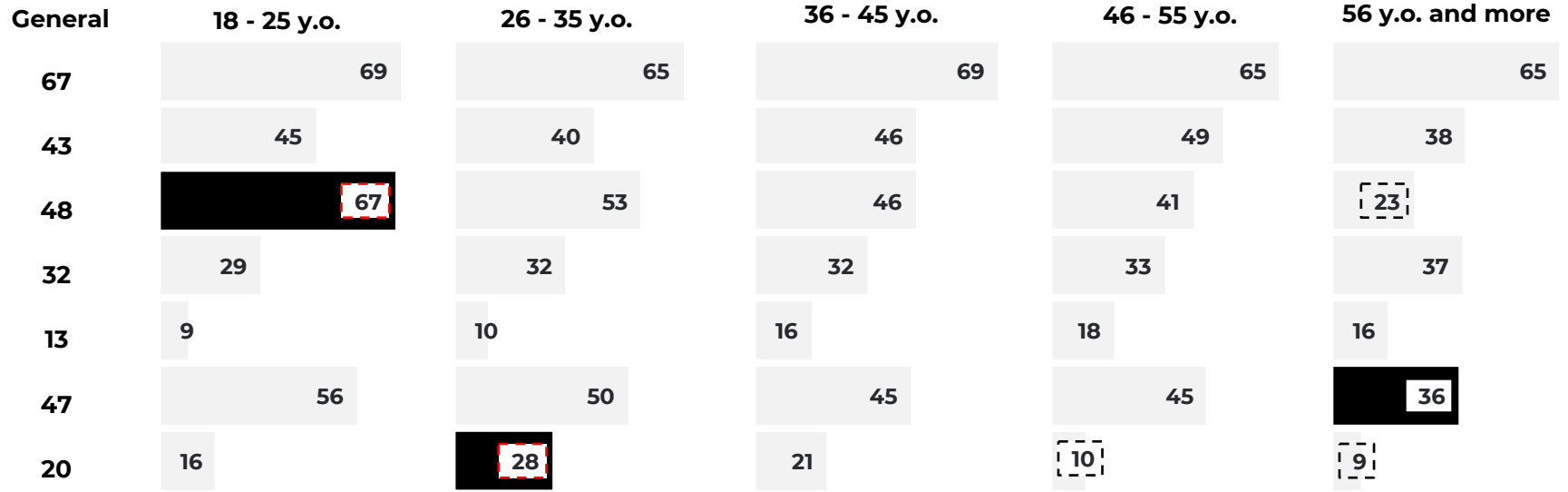
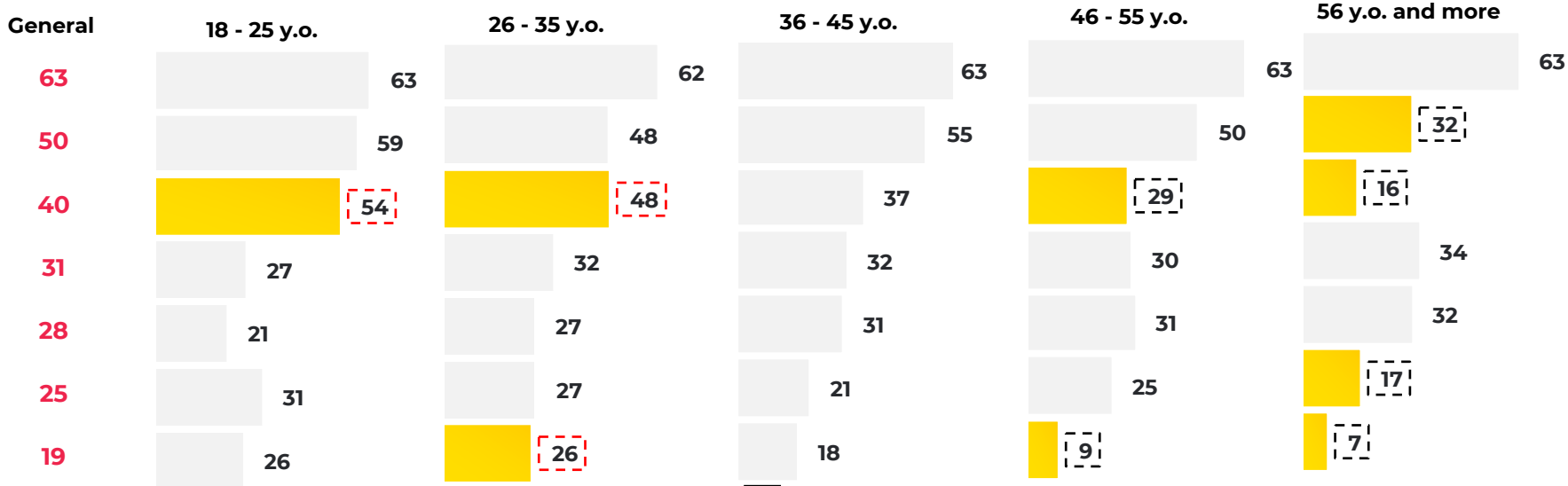# GAS STATION ARRANGEMENT: AGE

%, all respondents

REQUIRED ATTRIBUTES

HIGHWAY

Attribute	General	18 - 25 y.o.	26 - 35 y.o.	36 - 45 y.o.	46 - 55 y.o.	56 y.o. and more
Clean and spacious bathroom	67	69	65	69	65	65
The availability to leave a car in the parking lot under supervision	43	45	40	46	49	38
WiFi/ availability to charge the phone	48	67	53	46	41	23
Separate bathroom for men and women	32	29	32	32	33	37
Plenty of room near the cash desk	13	9	10	16	18	16
The opportunity to eat in comfort	47	56	50	45	45	36
Facilities for children	20	16	28	21	10	9

CITY

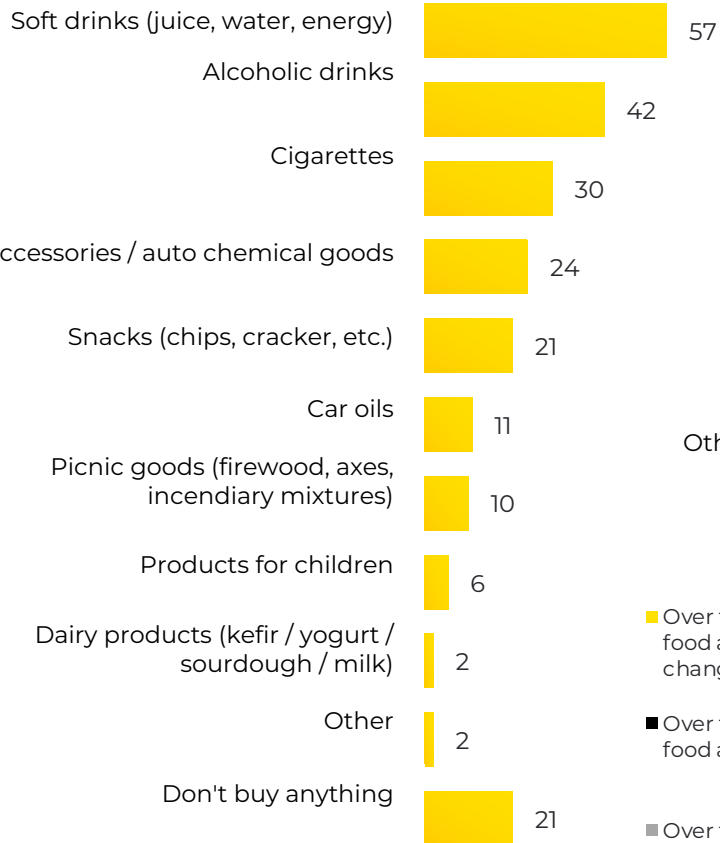| Attribute	General	18 - 25 y.o.	26 - 35 y.o.	36 - 45 y.o.	46 - 55 y.o.	56 y.o. and more
Clean and spacious bathroom	63	63	62	63	63	63
The availability to leave a car in the parking lot under supervision	50	59	48	55	50	32
WiFi/ availability to charge the phone	40	54	48	37	29	16
Separate bathroom for men and women	31	27	32	32	30	34
Plenty of room near the cash desk	28	21	27	31	31	32
The opportunity to eat in comfort	25	31	27	21	25	17
Facilities for children	19	26	26	18	9	7

Q15. Which of the following, in your opinion, must be at the gas station on the highway.
Q16. Which of the following, in your opinion, must be at a gas station in the city.

statistically significant differences at the 95% level compared to General
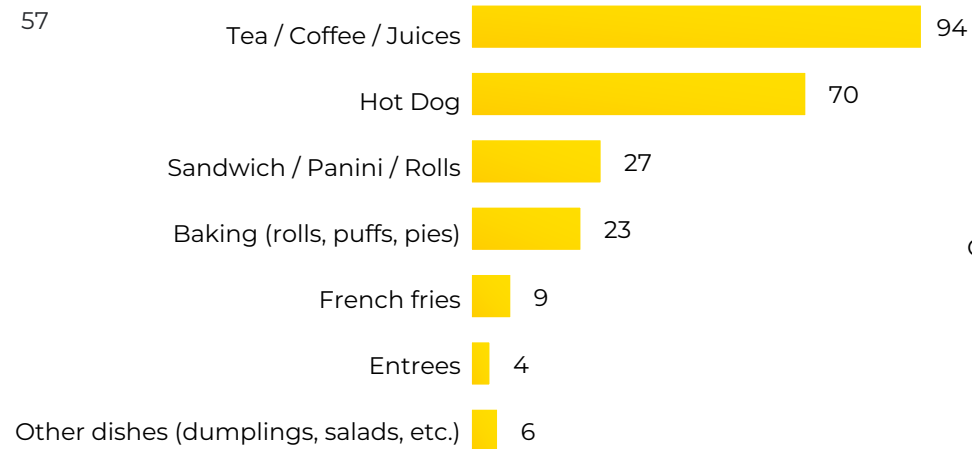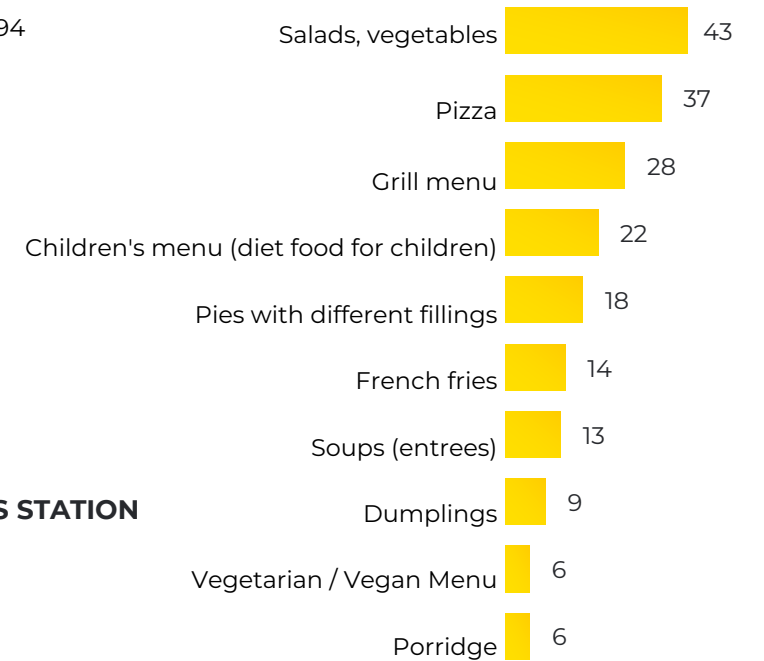
ASSORTMENT OF GOODS AND FOOD
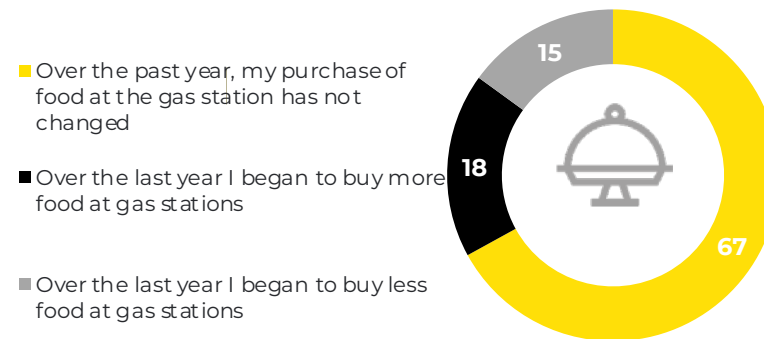
%, all respondents

RELATED PRODUCTS

Soft drinks (juice, water, energy)	57
Alcoholic drinks	42
Cigarettes	30
Car accessories / auto chemical goods	24
Snacks (chips, cracker, etc.)	21
Car oils	11
Picnic goods (firewood, axes, incendiary mixtures)	10
Products for children	6
Dairy products (kefir / yogurt / sourdough / milk)	2
Other	2
Don't buy anything	21

WHAT FOOD DO BUY

Tea / Coffee / Juices	94
Hot Dog	70
Sandwich / Panini / Rolls	27
Baking (rolls, puffs, pies)	23
French fries	9
Entrees	4
Other dishes (dumplings, salads, etc.)	6

INFLUENCE OF FREQUENCY OF PURCHASING FOOD ON A GAS STATION

- Over the past year, my purchase of food at the gas station has not changed — 67
- Over the last year I began to buy more food at gas stations — 18
- Over the last year I began to buy less food at gas stations — 15

WHAT FOOD WOULD LIKE TO BUY

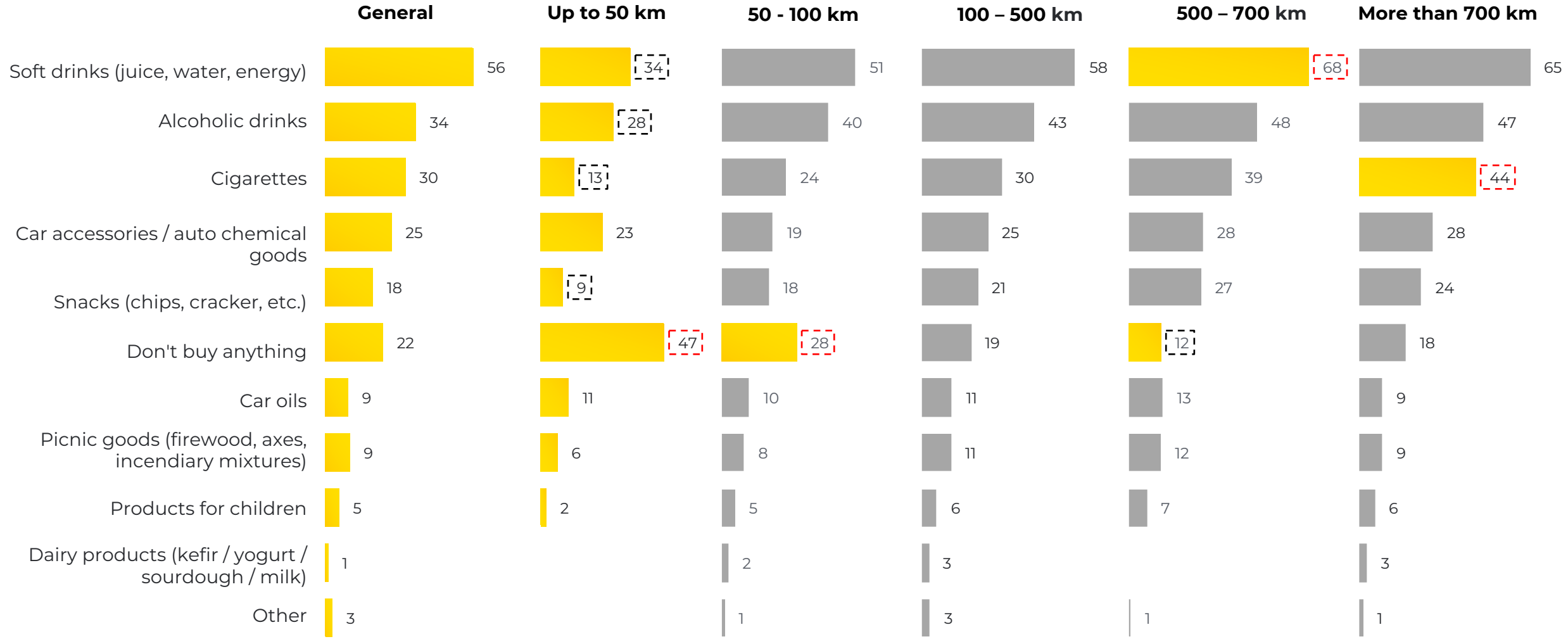|	
Salads, vegetables	43
Pizza	37
Grill menu	28
Children's menu (diet food for children)	22
Pies with different fillings	18
French fries	14
Soups (entrees)	13
Dumplings	9
Vegetarian / Vegan Menu	6
Porridge	6

WAITING TIME

00:15

E1. What, besides fuel, do you usually still buy at gas stations? E0. Do you buy food (hot dogs, burgers, coffee, tea, etc.) at the gas station?
E2. What kind of food do you buy at the gas station?
E4. What food would you like to see at the gas station, but it is not available (or it is very rare)?
E5. What is the maximum time you are ready to wait for food at the gas station?
E6. Which of the following statements is more suitable for you?

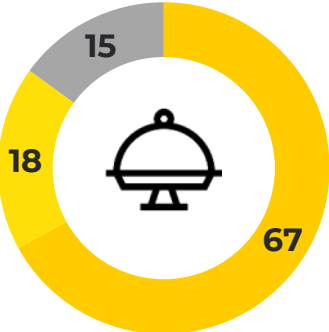# ASSORTMENT OF RELATED GOODS: KILOMETERS PER WEEK

%, all respondents

	General	Up to 50 km	50 - 100 km	100 – 500 km	500 – 700 km	More than 700 km
Soft drinks (juice, water, energy)	56	34	51	58	68	65
Alcoholic drinks	34	28	40	43	48	47
Cigarettes	30	13	24	30	39	44
Car accessories / auto chemical goods	25	23	19	25	28	28
Snacks (chips, cracker, etc.)	18	9	18	21	27	24
Don't buy anything	22	47	28	19	12	18
Car oils	9	11	10	11	13	9
Picnic goods (firewood, axes, incendiary mixtures)	9	6	8	11	12	9
Products for children	5	2	5	6	7	6
Dairy products (kefir / yogurt / sourdough / milk)	1		2	3		3
Other	3		1	3	1	1

E1. What, besides fuel, do you usually buy at gas stations? E0. Do you buy food (hot dogs, burgers, coffee, tea, etc.) at the gas station?

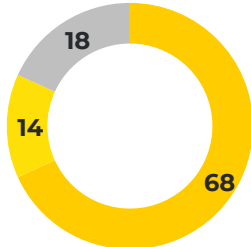statistically significant differences at 95% level

Influence of frequency of purchasing food at a gas station: kilometers per week / location of filling - city / highway
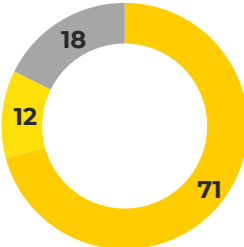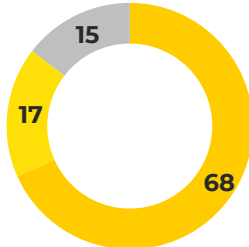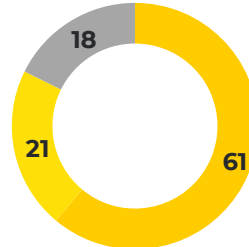
%, all respondents

General

15
18
67

Up to 50 km

18
14
68

50 - 100 km
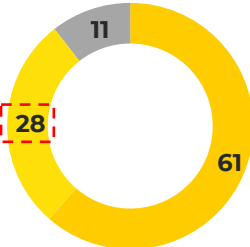
18
12
71

**100 – 500 km**

15
17
68

500 – 700 km

18
21
61

More than 700 km

11
28
61

■ Over the past year, my purchase of food at the gas station has not changed

■ Over the last year I began to buy more food at gas stations

■ Over the last year I began to buy less food at gas stations

statistically significant differences at 95% level

E1. What else besides fuel do you usually buy at gas stations? E0. Do you buy food (hot dogs, burgers, coffee, tea, etc.) at the gas station?

Base: All respondents N = 748,> 50 km N = 22, 50 - 100 km N = 130, 100 - 500 km N = 426, 500 - 700 km N = 113, <700 km N = 57
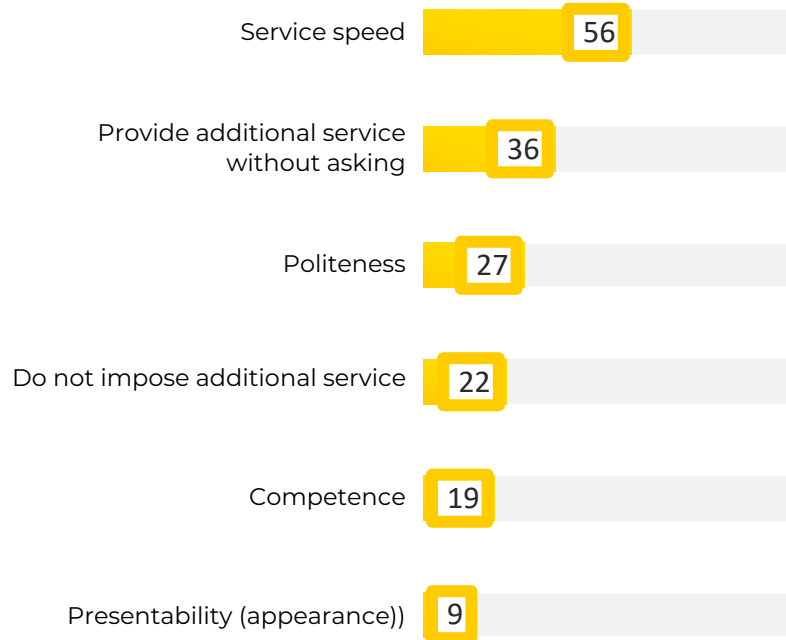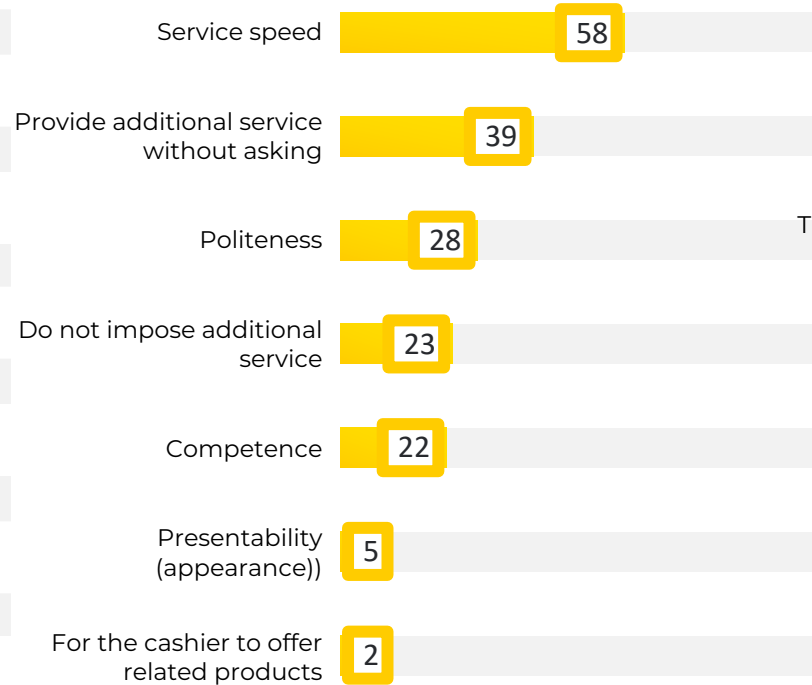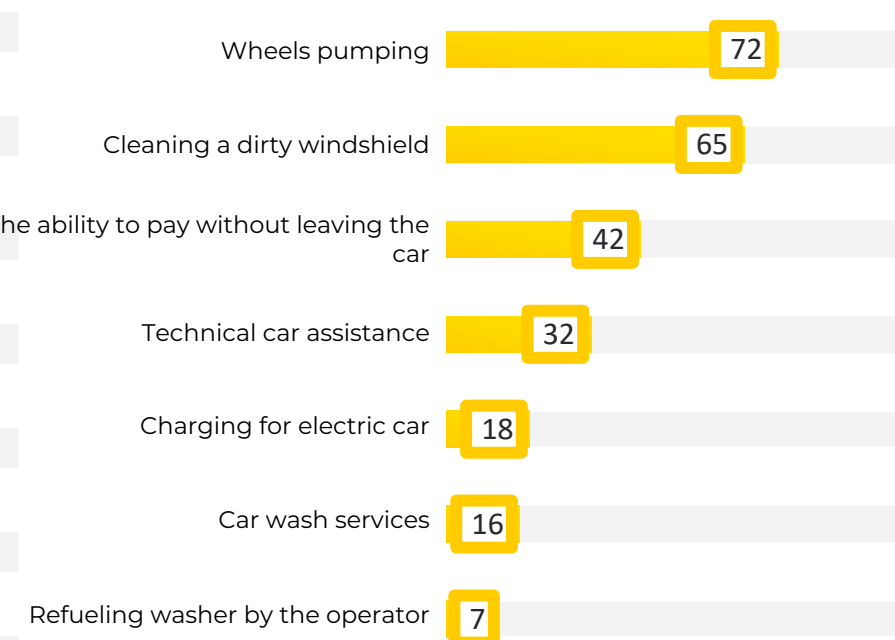
Service

%, all respondents

HIGH SERVICE Gas Stations

The operators need to improve

Service speed	56
Provide additional service without asking	36
Politeness	27
Do not impose additional service	22
Competence	19
Presentability (appearance))	9

The cashiers need to improve

Service speed	58
Provide additional service without asking	39
Politeness	28
Do not impose additional service	23
Competence	22
Presentability (appearance))	5
For the cashier to offer related products	2

Additional services in demand

Wheels pumping	72
Cleaning a dirty windshield	65
The ability to pay without leaving the car	42
Technical car assistance	32
Charging for electric car	18
Car wash services	16
Refueling washer by the operator	7

F1. What, in your opinion, should be improved by cashiers in order for this gas station to become for you the gas station with the highest level of service.
F2. What, in your opinion, needs to be improved for operators in order for this gas station to become for you the gas station with the highest level of service.
F3 Which of the following, in your opinion, should be at a "good gas station"? Name no more than the 3 most important attributes for you personally.
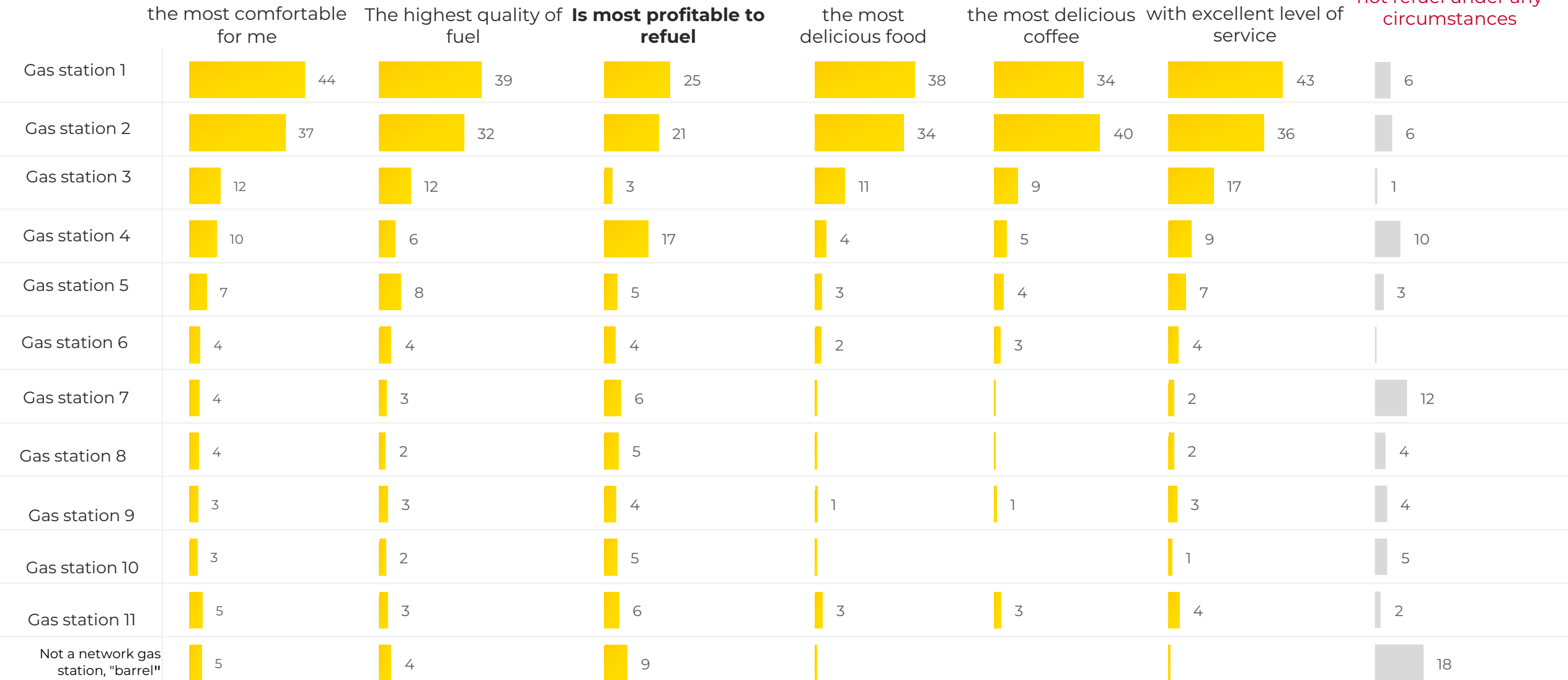
IMAGE

WHAT FILLING IS THE MOST … .. / TOP-11

%, all respondents

	the most comfortable for me	The highest quality of fuel	**Is most profitable to refuel**	the most delicious food	the most delicious coffee	with excellent level of service	A gas station where I will not refuel under any circumstances
Gas station 1	44	39	25	38	34	43	6
Gas station 2	37	32	21	34	40	36	6
Gas station 3	12	12	3	11	9	17	1
Gas station 4	10	6	17	4	5	9	10
Gas station 5	7	8	5	3	4	7	3
Gas station 6	4	4	4	2	3	4	
Gas station 7	4	3	6			2	12
Gas station 8	4	2	5			2	4
Gas station 9	3	3	4	1	1	3	4
Gas station 10	3	2	5			1	5
Gas station 11	5	3	6	3	3	4	2
Not a network gas station, "barrel"	5	4	9				18

I1. Which gas stations, in your opinion, correspond to each of the following statements? You can name no more than 3 gas stations for each statement.
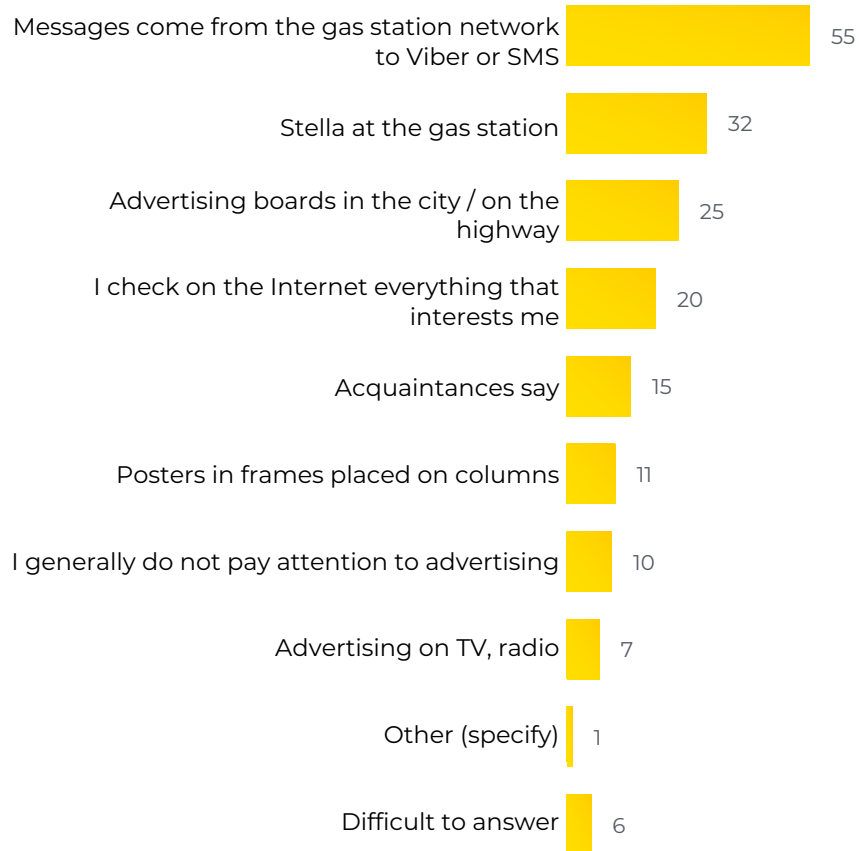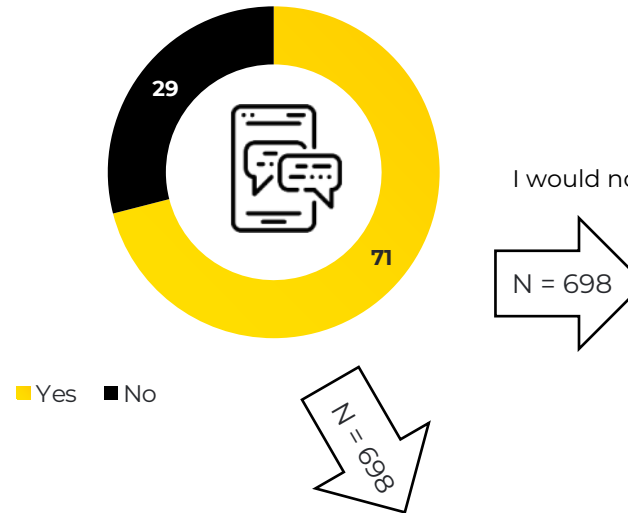
ADVERTISING

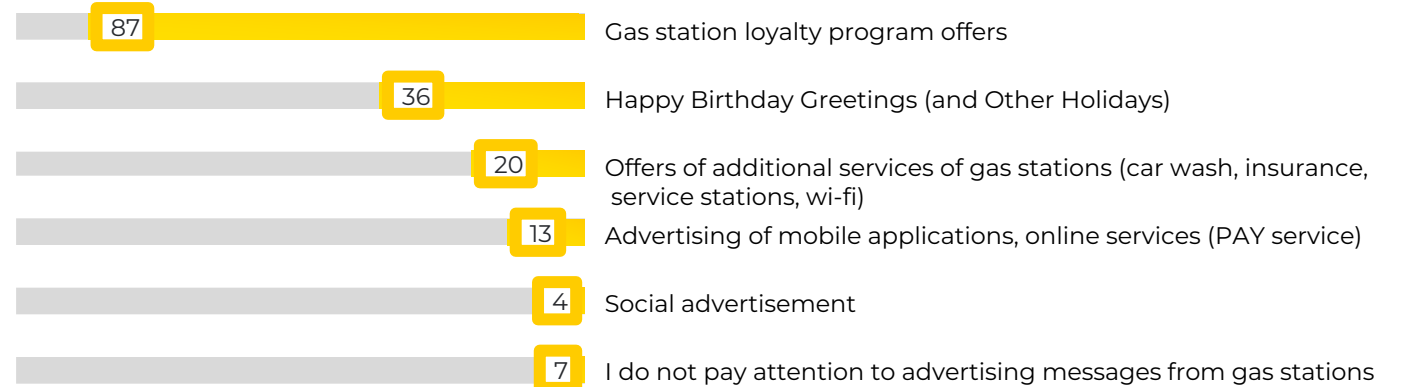# COMMUNICATION CHANNELS AND THEIR CONTENT

%, all respondents

INFORMATION SOURCES

Messages come from the gas station network to Viber or SMS	55
Stella at the gas station	32
Advertising boards in the city / on the highway	25
I check on the Internet everything that interests me	20
Acquaintances say	15
Posters in frames placed on columns	11
I generally do not pay attention to advertising	10
Advertising on TV, radio	7
Other (specify)	1
Difficult to answer	6

A1. How do you know about news and promotions of a gas stations?
A2. Do you receive messages from gas stations?
A3. What advertising messages do you pay attention to?
A4. What messages from the gas station would you like to receive?

GETTING MESSAGES FROM A GAS STATION

29
71

■ Yes ■ No

N = 698
N = 698

INFORMATION IN WHICH ARE INTERESTED

Promotions	49
Discounts	25
News, Newsletters	7
I would not like to receive messages	6
Information	6
About price cuts	6
About Gift, Prizes	4
Messages that I receive now	4

ATTRACTS ATTENTION

87	Gas station loyalty program offers
36	Happy Birthday Greetings (and Other Holidays)
20	Offers of additional services of gas stations (car wash, insurance, service stations, wi-fi)
13	Advertising of mobile applications, online services (PAY service)
4	Social advertisement
7	I do not pay attention to advertising messages from gas stations