

# Petroleum Ukraine 2019

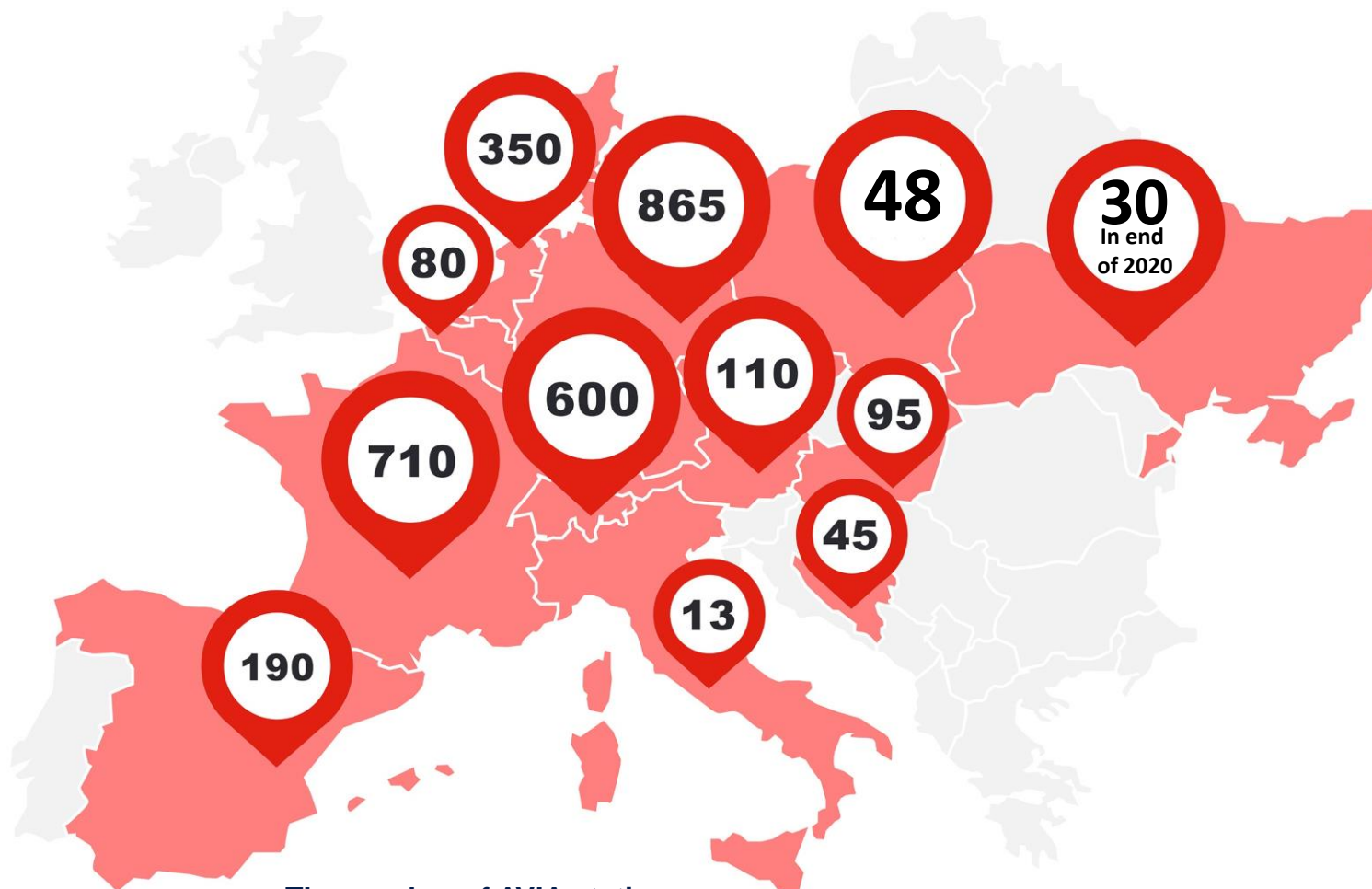


**Customer of the petrol station network in Europe**

**Adam Sikorski – UNIMOT S.A.**

## The strength of the Swiss brand AVIA builds presence in 15 European countries

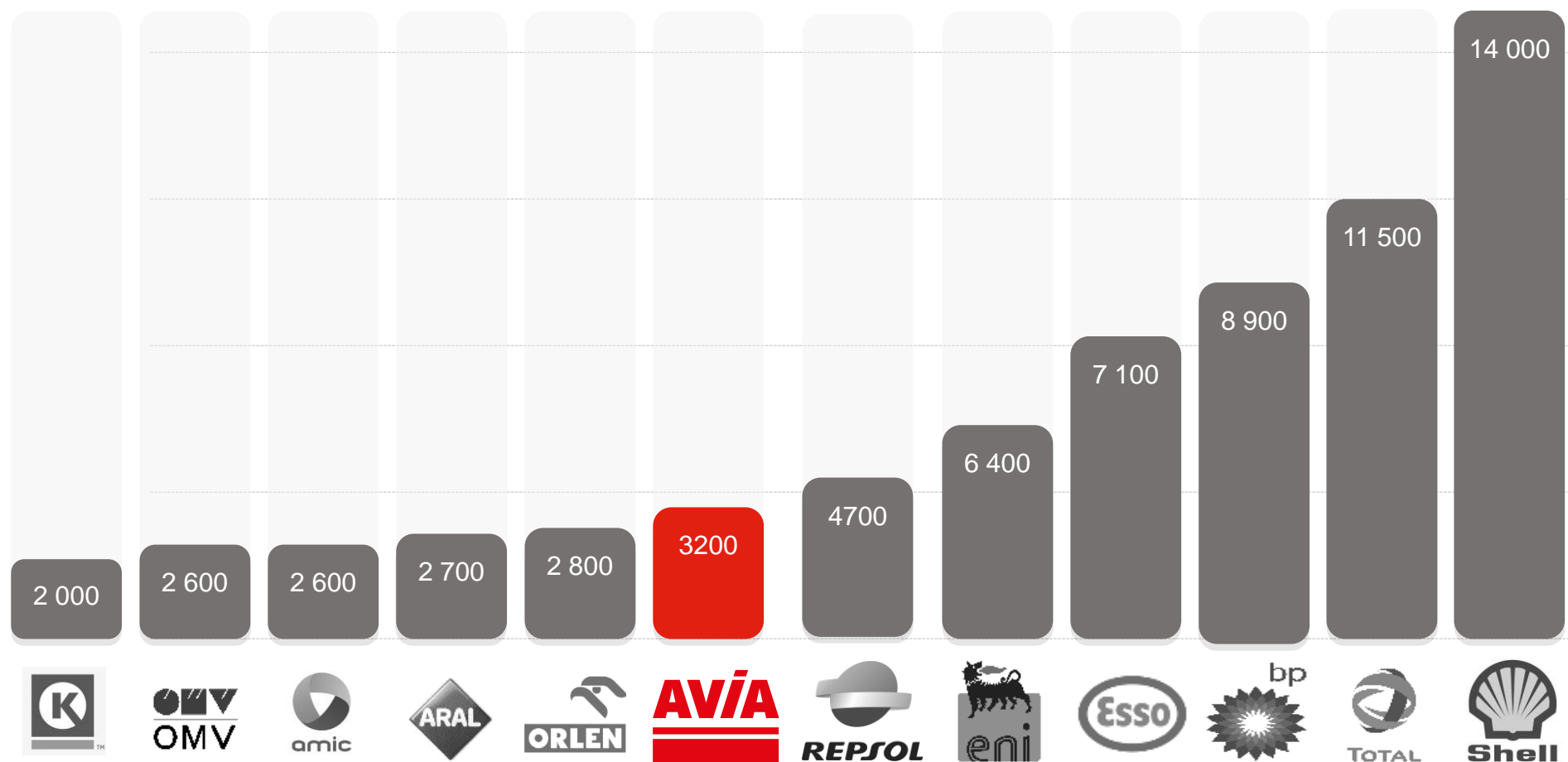
AVIA is the brand established in 1927 in Switzerland, currently represented by over 3150 of petrol stations in 14 European countries. Over 90 years of experience on the fuel market has made AVIA popular in such countries as: Germany (865 stations) , France (710 stations) , Switzerland (600 stations) , the Netherlands (350 stations), o Spain (190 stations). In Europe the brand offers also oils and lubricants, natural gas and LPG, as well as heating oil and electricity.



The number of AVIA stations on the main European markets



# Fuel brand number 7 in Europe



# The results of the AVIA survey of petrol station customers in Europe



Target Group	Car drivers older than 18 years, refueling their car at least once per month	
Survey Method	Online Interviews	
Fieldwork	22 <sup>nd</sup> February to 19 <sup>th</sup> March	
Country	Sample size	Regions included
AT	1.016	Upper Austria, Lower Austria, Burgenland, Tyrol, Vienna
BE	1.022	nationwide
FR	2.048	nationwide
DE	2.041	nationwide except Berlin, Brandenburg, Saxony-Anhalt
HU	1.021	nationwide
NL	1.005	nationwide
PL	1.001	nationwide
RS	1.040	nationwide
ES	1.000	Basque Country, Navarra, Cantabria, Castilla y León
CH	1.020	nationwide

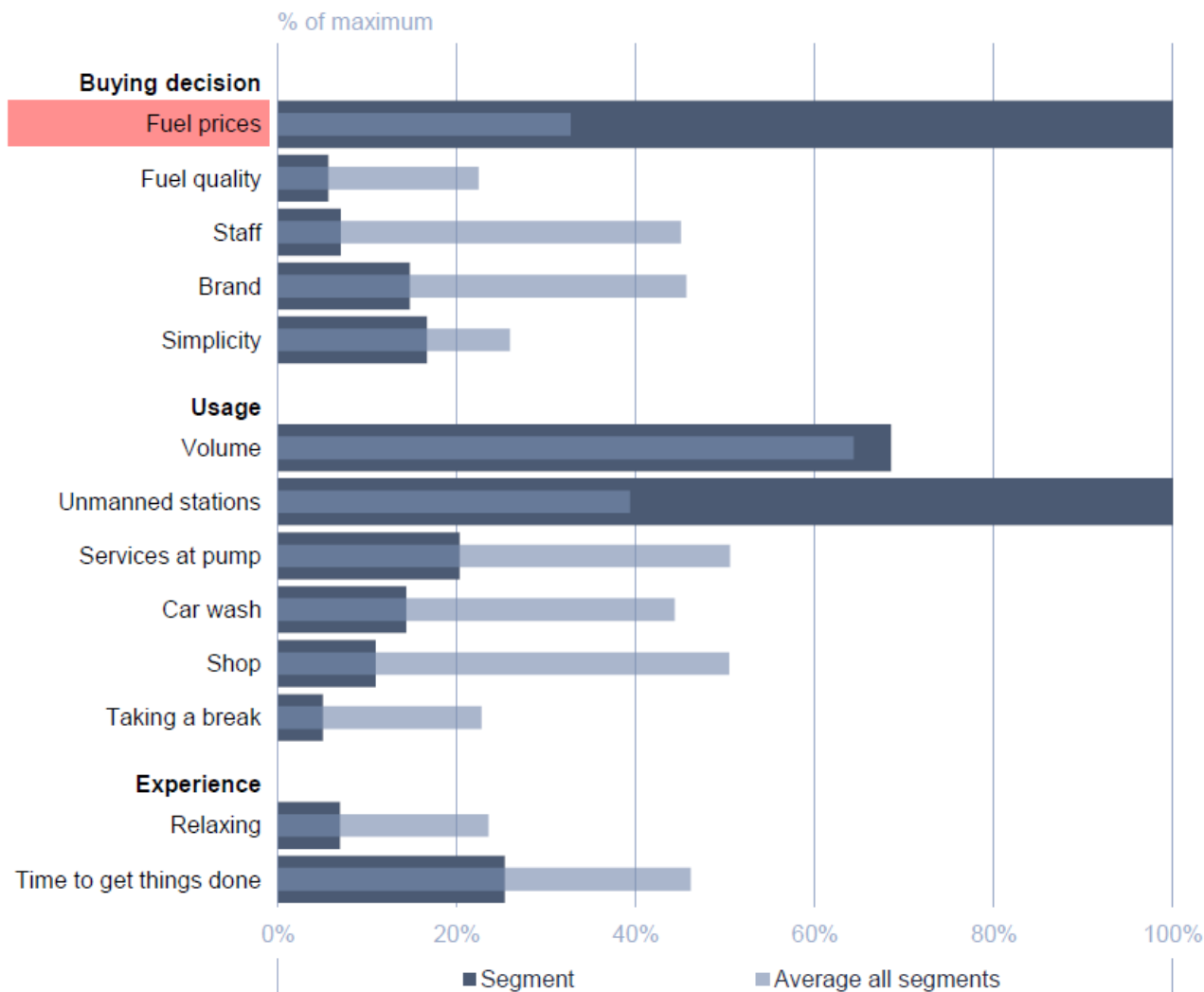


**All petrol station  
customers are divided  
into 6 segments**



# Segment nr 1: Bargainers

Main characteristic:  
Highest fuel price sensitivity



Segment Size:

15,9%

Average for all countries surveyed

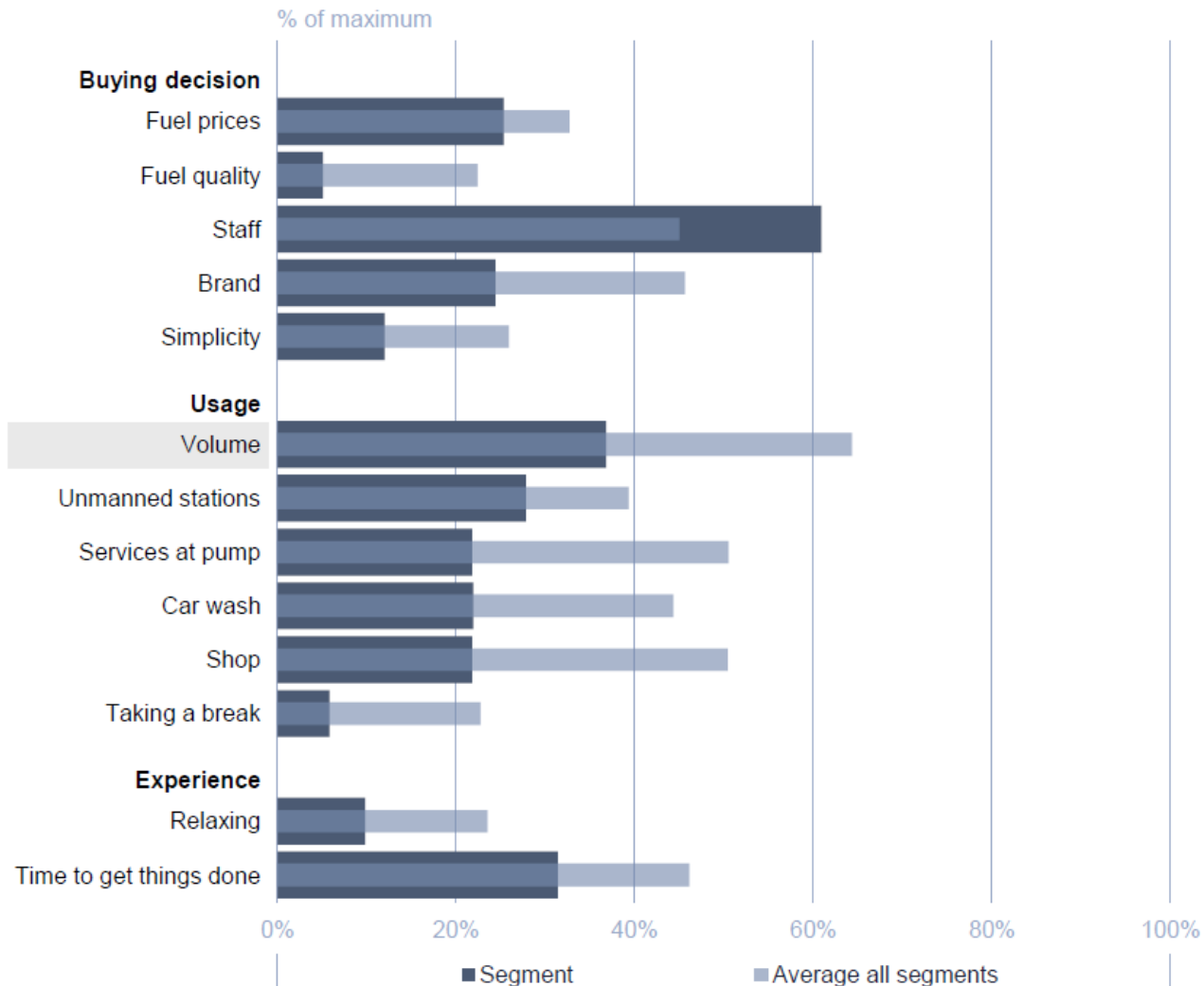


## Quick Facts:

- ▶ Buying decision based on fuel prices
- ▶ Highest usage of unmanned stations
- ▶ Oldest segment (51 y)
- ▶ Above average share of men (60%)
- ▶ Lowest premium fuel usage
- ▶ Highest diesel share
- ▶ Combines refueling with shopping
- ▶ Status unimportant
- ▶ Smart shoppers
- ▶ Lowest price premium for eco-friendly products

# Segment nr 2: Occasionalists

Main characteristic:  
**Lowest fuel volume**



Segment Size:

25,9%

Average for all countries surveyed

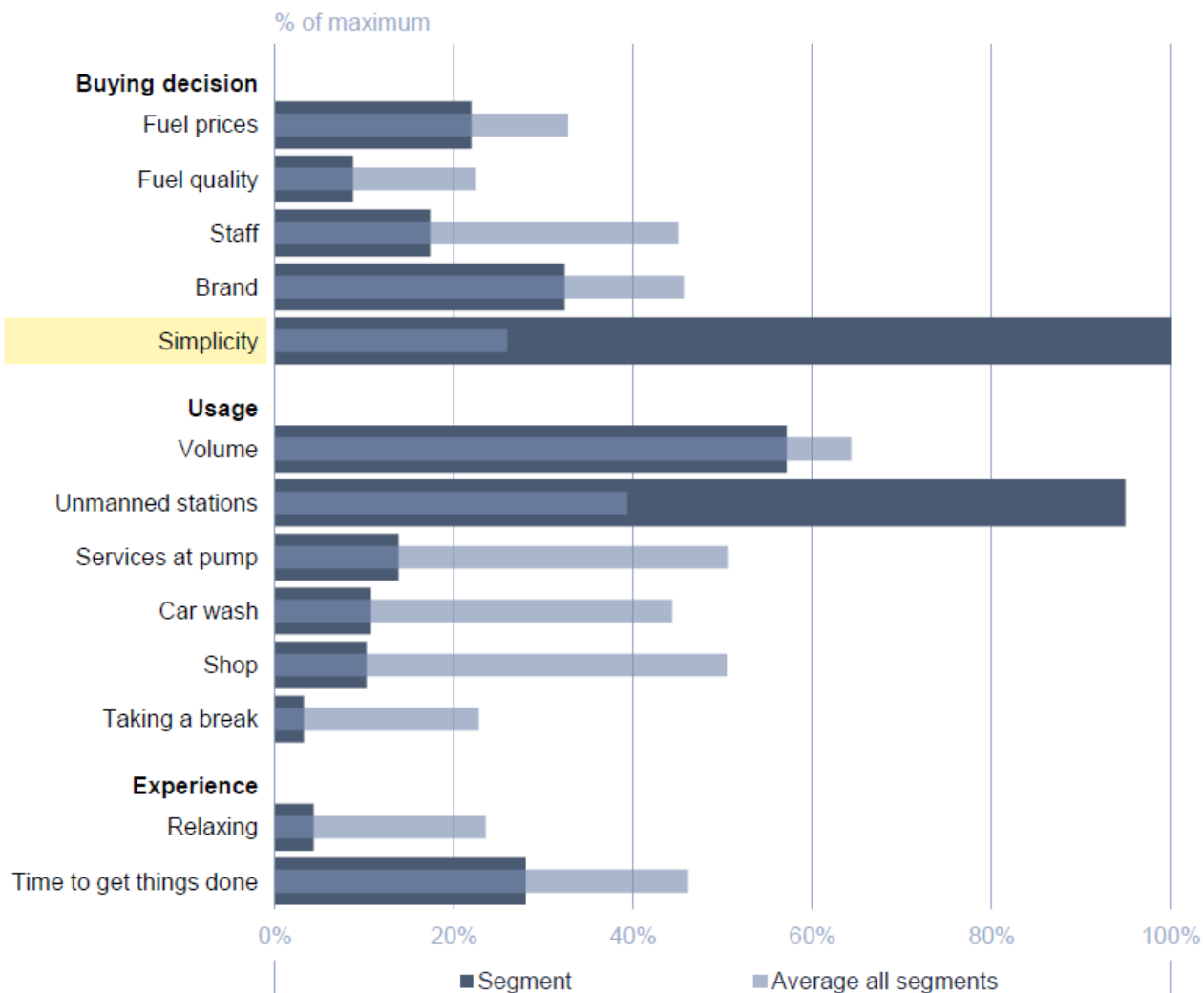
## Quick Facts:

- ▶ Drives only occasionally
- ▶ Customer-oriented staff important for buying decision
- ▶ Slightly above average age (48 y)
- ▶ Most female segment (50%)
- ▶ Slightly tens financial situation
- ▶ Lowest car expertise
- ▶ Lowest business share
- ▶ Highest gasoline share
- ▶ Highest share of spontaneous filling station visits
- ▶ Highest share of used cars



# Segment nr 3: Time savers

Main characteristic:  
**Simplicity (simple & fast refueling) most important**



Segment Size:

8,9%

Average for all countries surveyed

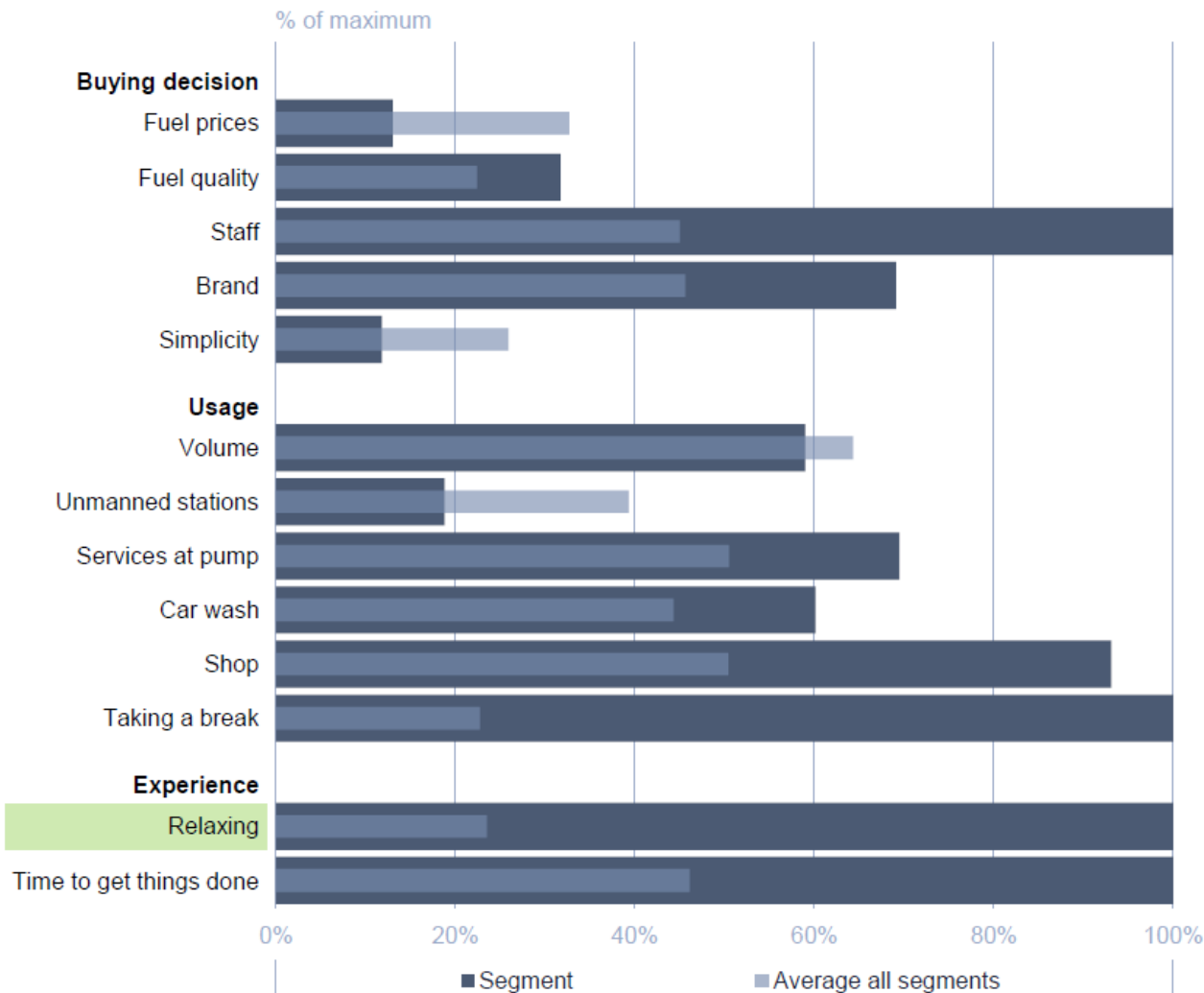
## Quick Facts:

- ▶ Simple and fast refueling most important
- ▶ Very high usage of unmanned stations
- ▶ Average age (48 y)
- ▶ Above average share of women (50%)
- ▶ Most rural segment
- ▶ Average financial situation
- ▶ Lowest service usage
- ▶ Not using filling stations to take a break
- ▶ Low interest in car topics



# Segment nr 4: Relaxers

Main characteristic:  
Experiences filling station visits as relaxing



Segment Size:

13,1%

Average for all countries surveyed ↑

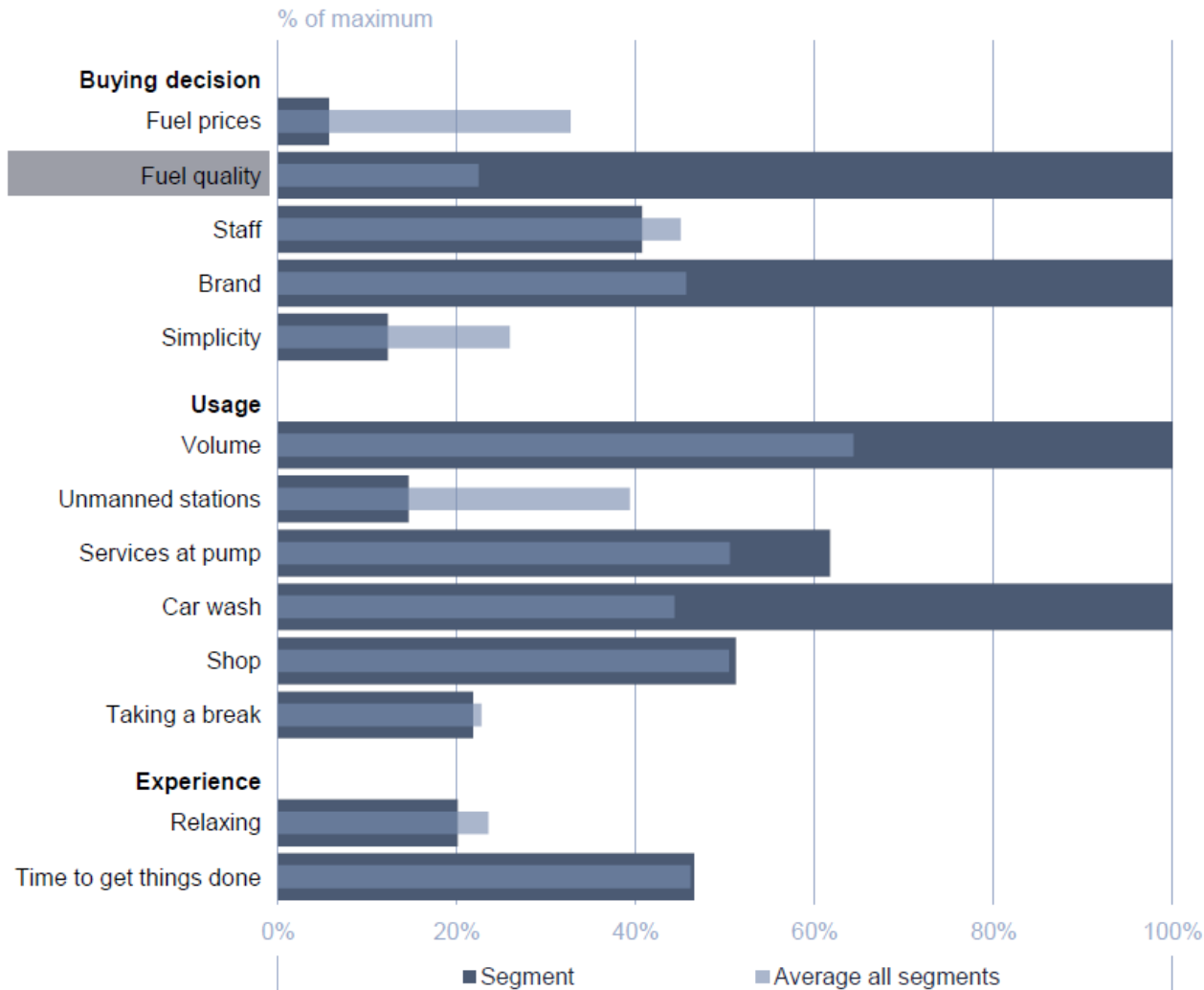
## Quick Facts:

- ▶ Uses filling stations for taking a break and getting things done
- ▶ Customer-oriented staff most important
- ▶ Youngest segment (42 y)
- ▶ Very high share of men (61%)
- ▶ Most urban segment
- ▶ High service usage (esp. shop)
- ▶ Highest interest in car topics
- ▶ Highest car expertise
- ▶ Highest share of planned filling station visits
- ▶ Highest business share
- ▶ Early adopters



# Segment nr 5: Premiums

Main characteristic:  
Buying decision based on quality and brand



Segment Size:

12,8%

Average for all countries surveyed

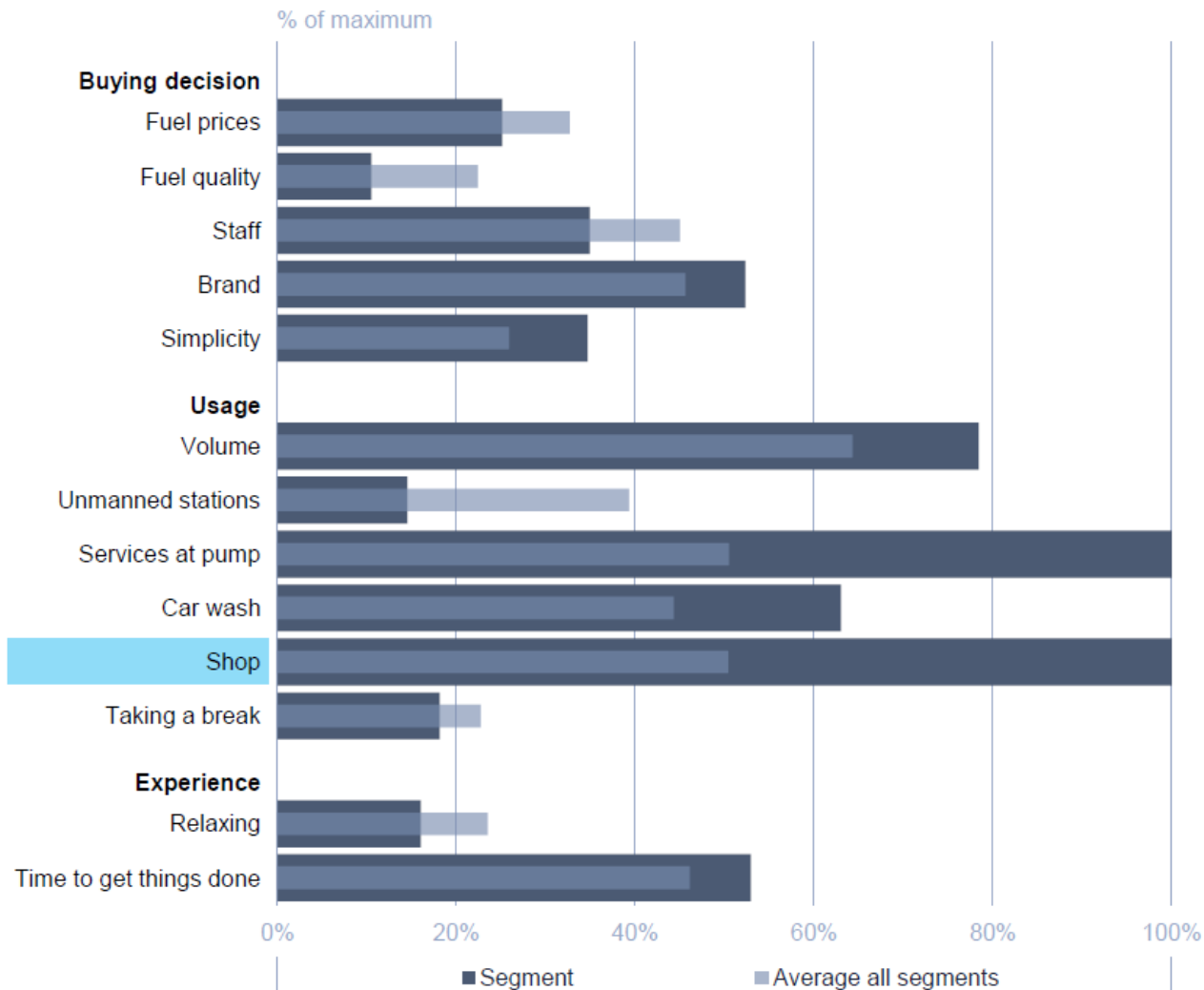


## Quick Facts:

- ▶ Very quality and brand conscious
- ▶ Highest volume and car wash usage
- ▶ Younger than average (44 y)
- ▶ Most male segment (63%)
- ▶ Highest premium fuel usage
- ▶ Very high interest in car topics
- ▶ Very high car expertise
- ▶ Refuels most likely to or from work
- ▶ Quality is more important than price
- ▶ Active lifestyle

# Segment nr 6: Conveniencers

Main characteristic:  
Highest usage of services at filling stations



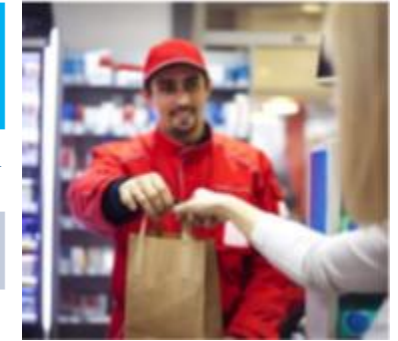
Segment Size:

23,4%

Average for all countries surveyed ↑

## Quick Facts:

- ▶ Highest shop usage
- ▶ Highest usage of services at pump (e.g. pump up tires, cleaning windows)
- ▶ Second highest car wash usage
- ▶ Uses stations with shop
- ▶ Average age (47 y)
- ▶ Average share of women (45%)
- ▶ Likes to spend time with family and friends



# Segments by country

Country	Bargainers	Occasionalists	Time Savers	Relaxers	Premiums	Conveniencers
AT	19%	24%	13%	8%	7%	29%
BE	30%	23%	11%	8%	7%	21%
FR	26%	24%	14%	7%	7%	22%
DE	8%	37%	3%	16%	8%	28%
HU	13%	18%	9%	16%	25%	19%
NL	26%	29%	8%	10%	6%	21%
PL	6%	13%	7%	20%	25%	28%
RS	4%	28%	5%	24%	24%	14%
ES	8%	21%	7%	16%	22%	26%
CH	15%	32%	12%	10%	8%	23%
Total	16%	26%	9%	13%	13%	23%

# Thank you

[www.UNIMOT.pl](http://www.UNIMOT.pl)



**UNIMOT S.A.**

ul. Świerkłańska 2a,  
47-120 Zawadzkie  
POLAND

tel: +48 (34) 361 83 97

e-mail: [sekretariat@unimot.pl](mailto:sekretariat@unimot.pl)

