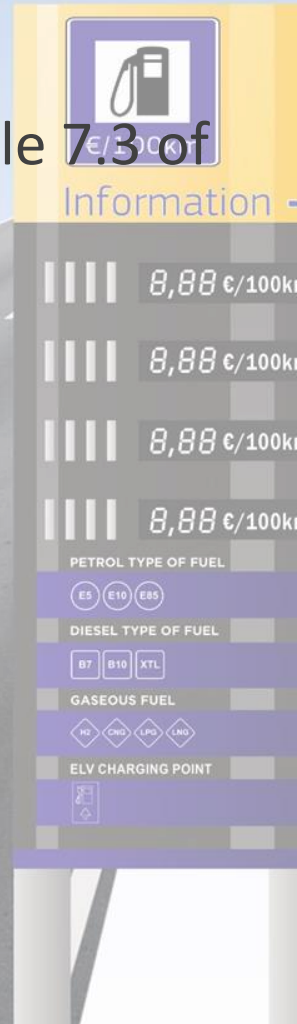




# Assisting Member States with the implementation of Article 7.3 of Directive 2014/94/EU (Fuel Price Comparison)

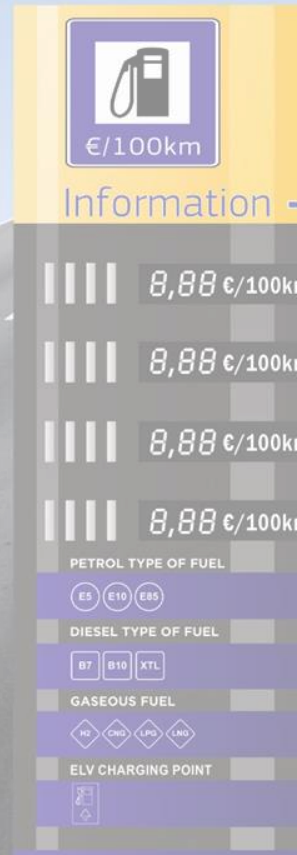
## Findings of the online survey

Anastasia Natasa GEORGARAKI



Ministry of Energy, Commerce and Industry  
REPUBLIC OF CYPRUS  
ageorgaraki@meci.gov.cy

- Introduction
- Setting the requirements
- Development of the questionnaire & Dissemination
- Evaluation process
- Overall outcome
- Differences between MS
- Conclusions



## Scope of Activity 2:

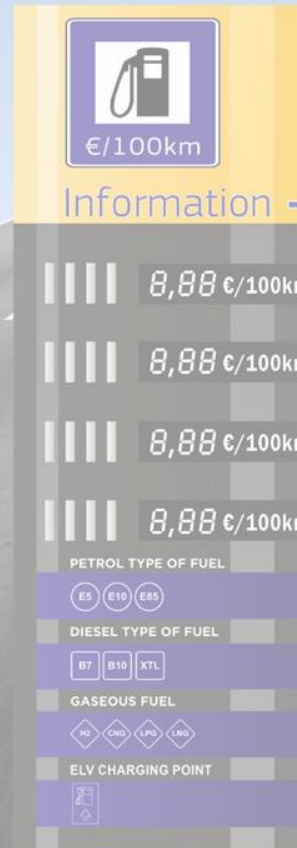
The aim of **Activity 2** is to define the **contents, format** and **location** of the information on fuel prices to be displayed at filling/charging stations considering the **perspective of the consumers** between the participating MS.

## Objectives:

The action was focused on the **elaboration** of an **online consumer questionnaire** in the languages of the MS participating in the PSA.

The **objectives** of the **online survey** were:

- ” to ensure the diversity of the sample
- ” to collect information on elements of the FPC information content and its most appealing location on the filling stations
- ” to gather information on consumers’ overall knowledge regarding alternative fuels
- ” to evaluate the FPC impact on consumers’ propensity towards alternative fuels



### #1 Diversity of sample:

- 1500 consumers in MS with population more than 20 million inhabitants
- 700 consumers in MS with population less than 20 million inhabitants
- MS targeted coverage of consumers from different regions/cities

### #2 Information on content and location:

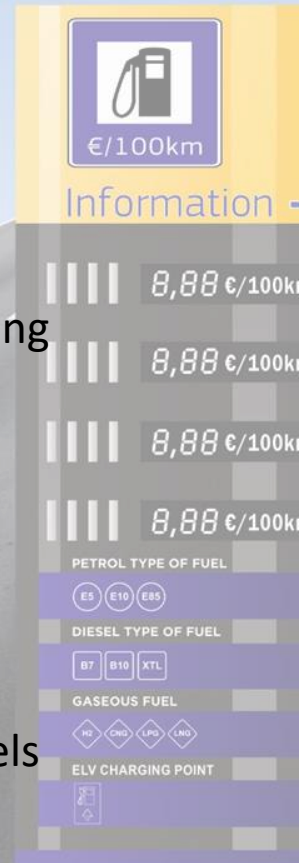
- Include questions about the preferred locations of displaying FPC at filling stations and elsewhere
- Include questions about the content of information

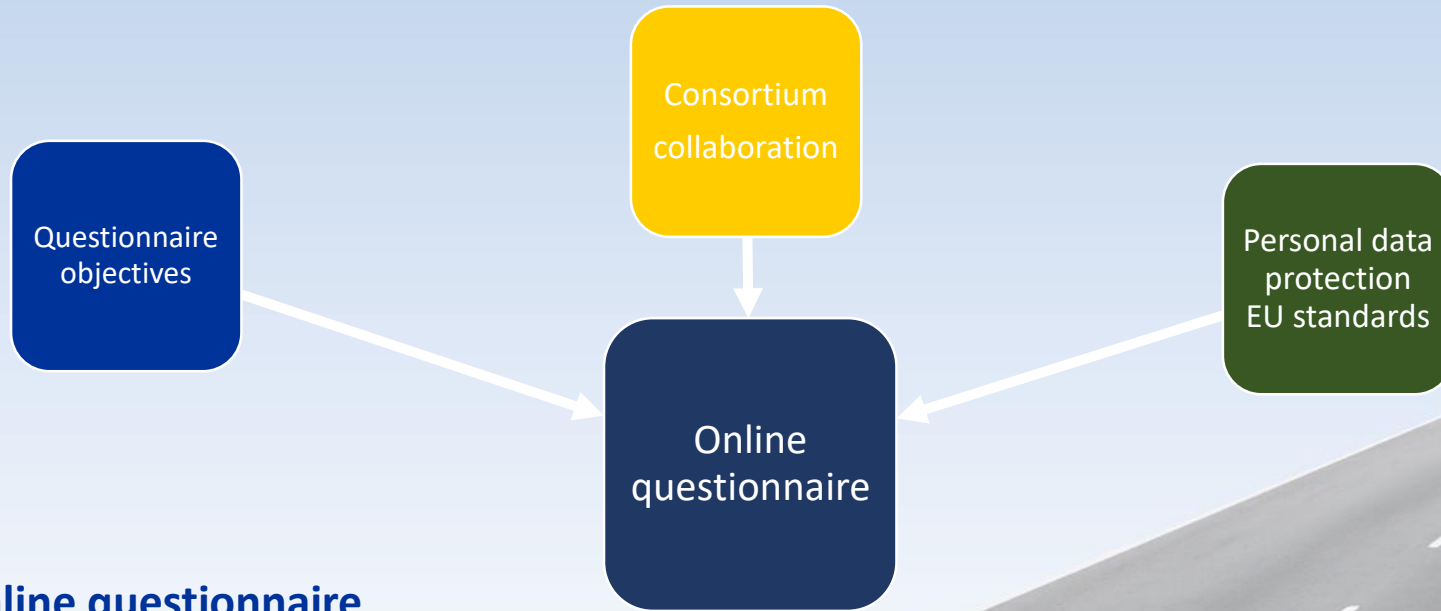
### #3 Overall knowledge for alternative fuels:

- Ask respondents to evaluate their knowledge of alternative fuels
- Ask respondents to compare the prices of the conventional and alternative fuels

### #4 FPC impact on consumers:

- Include questions to asses whether respondents would be influenced by the FPC



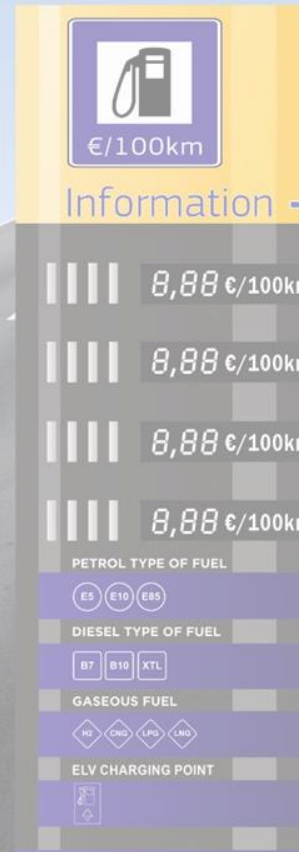


## Online questionnaire

- Total **22 questions** including demographics and objectives #2 to #4
- Translation to **national languages**
- Estimated **duration** of online questionnaire **4 minutes**

## Dissemination

The online questionnaire was communicated to the consumers via a **user-friendly interface** and a **simple structure** so to ensure maximum engagement.



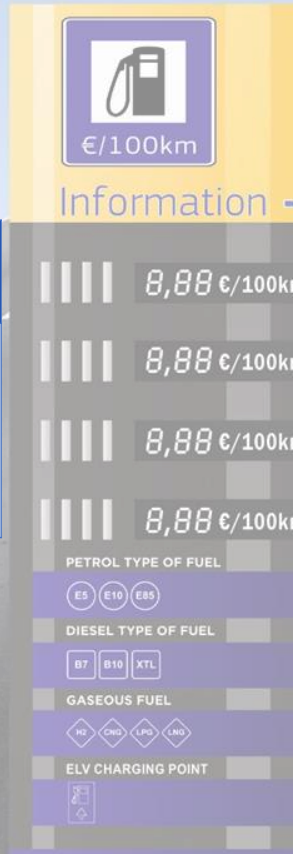
## Survey analysis

Collect data using a pre-specified format

Identify independent parameters including: (1) Age, (2) Degree of Urbanisation, (3) Vehicle size used and (4) Daily distance covered.

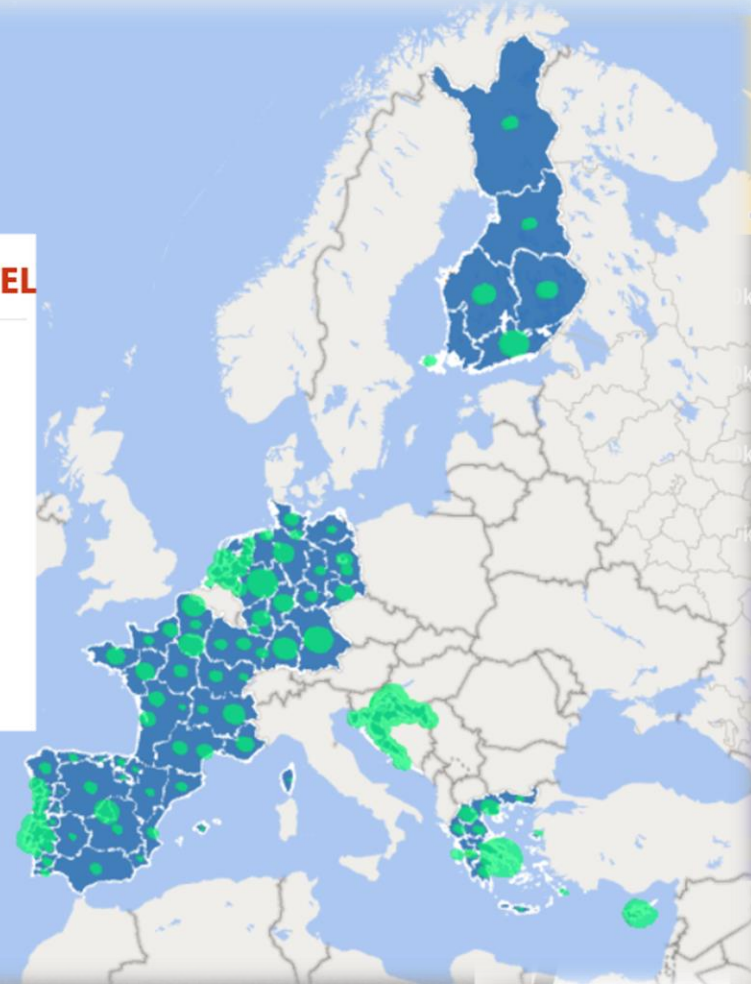
Age	Degree of urbanisation	Vehicle size	Daily distance
Young Adults	Urban	Small vehicle	Short distance
Middle-aged Adults	Suburban	Medium vehicle	Medium distance
Older Adults	Rural	Large vehicle	Long distance

Analyse the questions based on these parameters to evaluate effectively the consumers' preferences in relation to FPC and to determine the FPC impact on the specific consumer groups.



## Survey identity

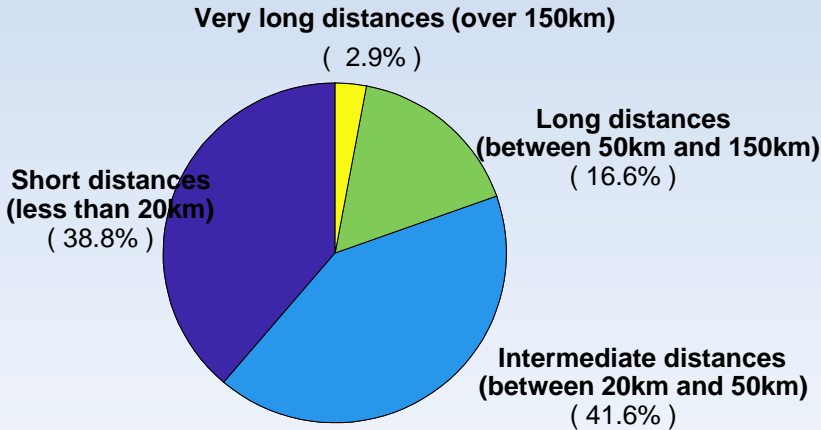
In total **7612 respondents** participated in the online survey, covering different ages, dwelling environments and vehicles' preferences and needs.



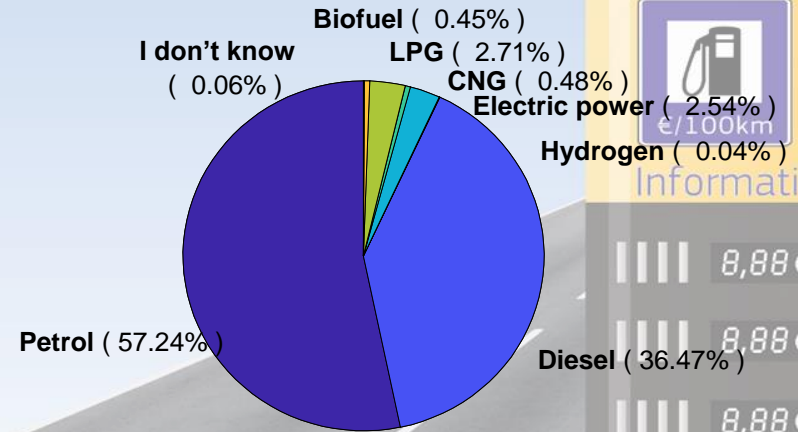
The online survey started on **July 2019** and ended on **September 2019**

# Overall outcome

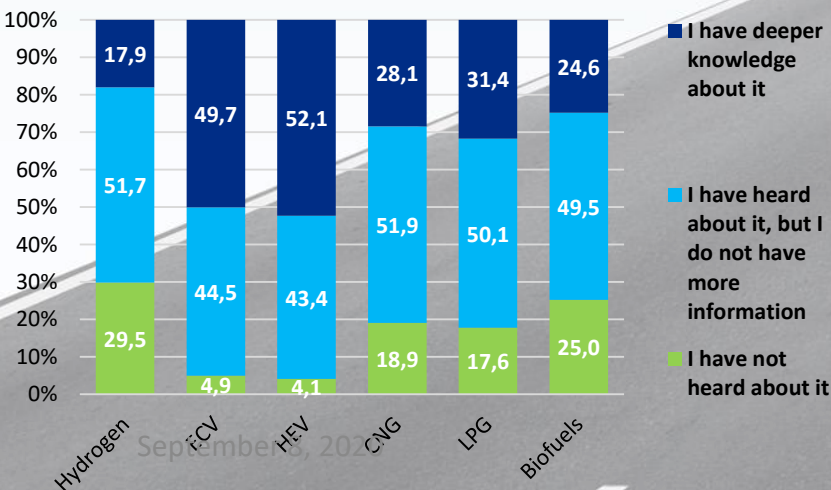
What average distance do you usually cover by car, daily?



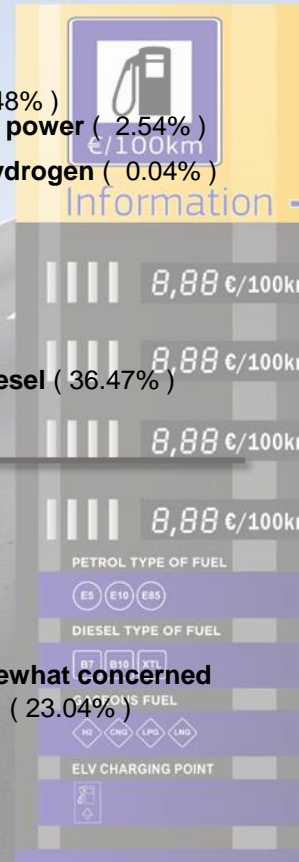
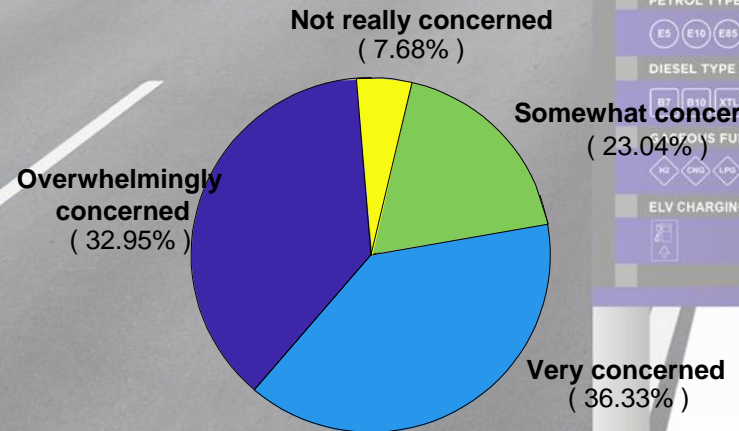
What type of fuel/energy do you use in your car / of the car you usually drive? (multiple answers possible)



Please evaluate your knowledge level regarding the fuels listed below



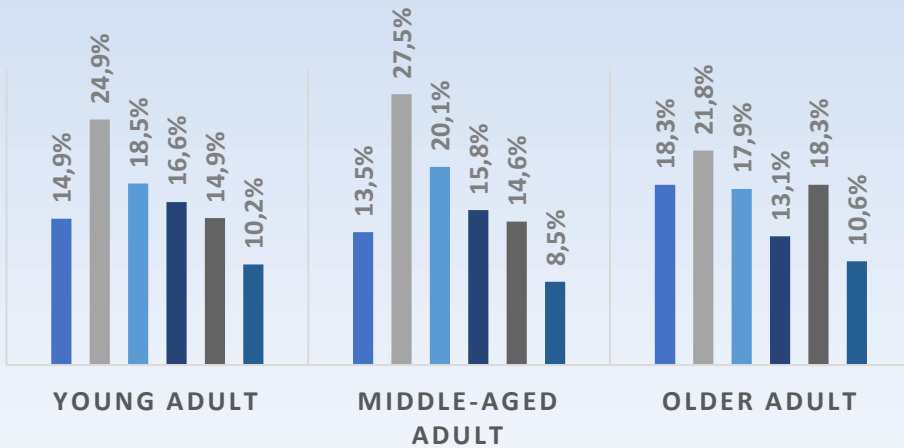
Are you ... about fuel prices?



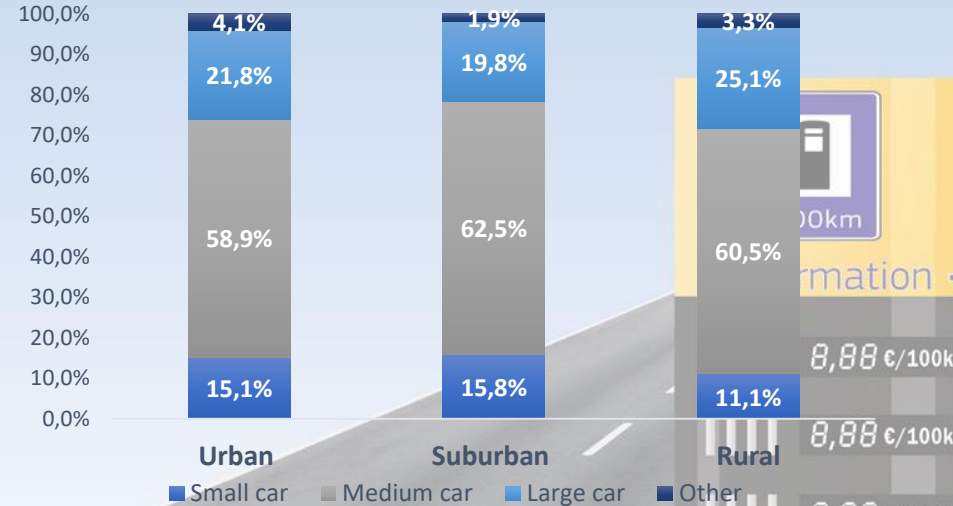


## Least expensive AF per age group

Hydrogen Electric power Hybrid CNG LPG Biofuels



## Vehicle size - Urbanisation Level

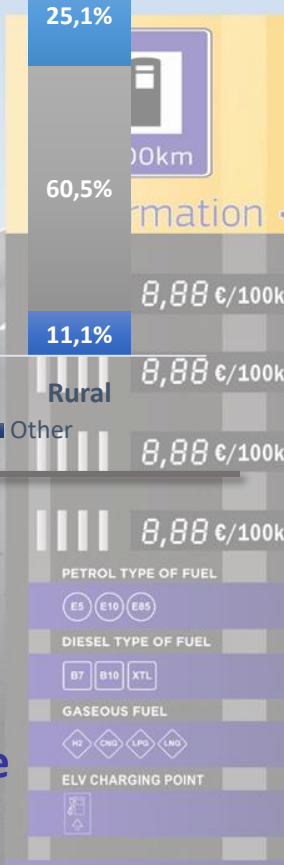


## Indicative Key points:

- 'Further education on this topic is needed'
- 'This kind of disclosure of the fuel price is against the grain. Bravo for EU regulation.'

Besides fuel stations, where would you like to find information regarding the fuel/energy prices in €/100 km?

- On website/Internet
- At car dealership
- TV/Media/News/Radio

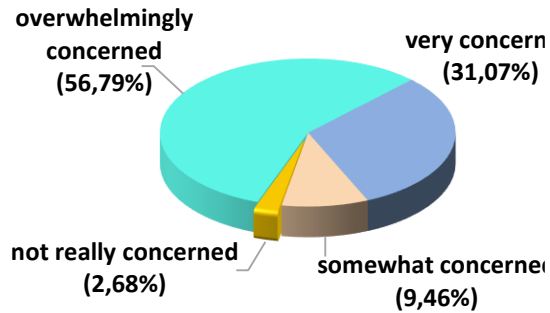


# Differences between MS

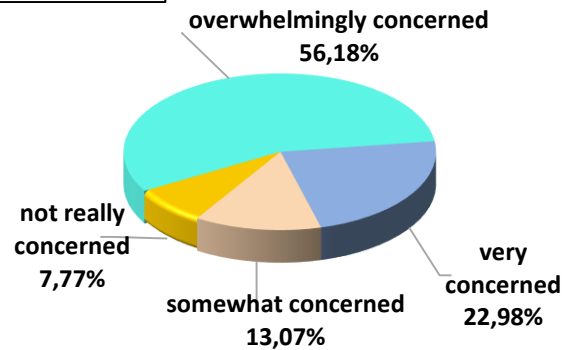
## Are you...about fuel prices?



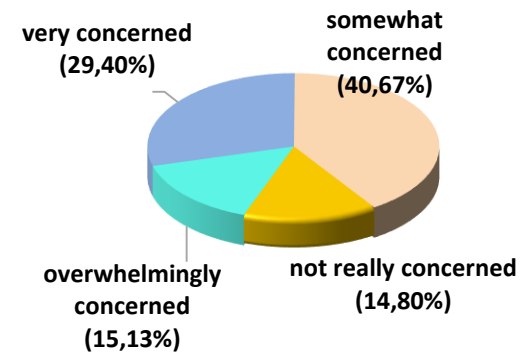
Spain



Cyprus



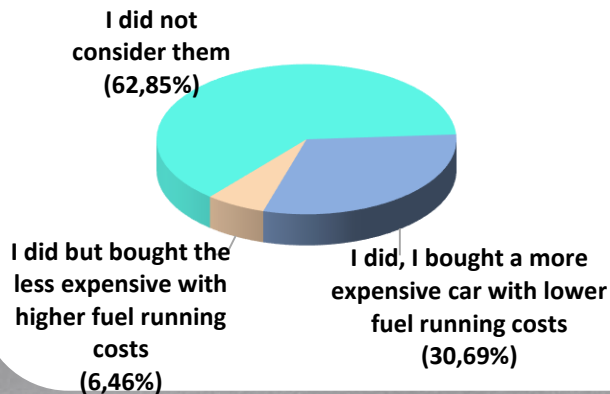
Germany



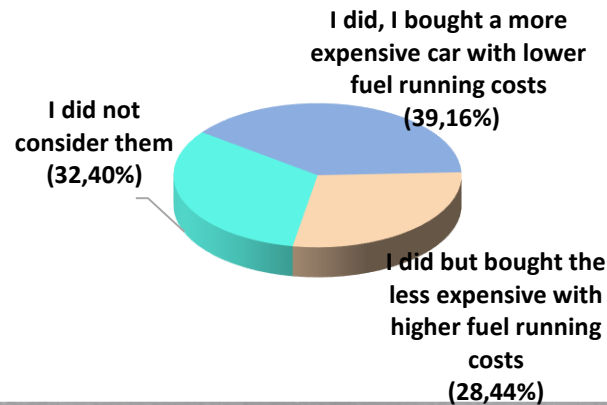
## Last time you bought a car, did you consider also the fuel running costs?



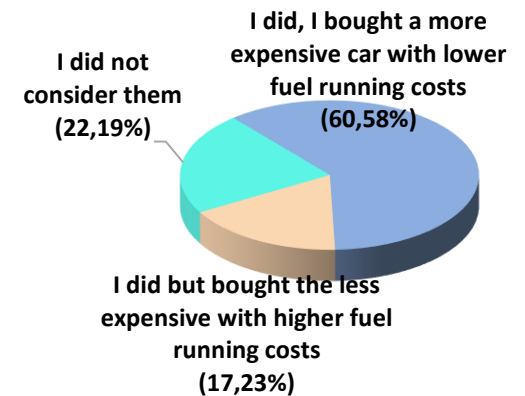
The Netherlands



France



Greece



## GENERAL

- ❖ 1 out of 4 responders drive a vehicle aged from 5 to 10 years (11.1yrs average EU fleet age, source: ACEA)
- ❖ **4 out of 5 concerned about environment** and make consumption choices based on their environmental impact
- ❖ **1 out of 2 wants to learn** more about alternative fuels
- ❖ **1 out of 2** did buy a more expensive vehicle with lower fuel running costs

## LOCATION

- ❖ **4 out of 5 prefer to be able to compare fuel prices while they refuel/recharge** their vehicle, at a filling station
- ❖ 2 out of 4 prefer a website for price comparison
- ❖ **1 out of 4 prefers at car dealership**
- ❖ 1 out of 4 prefers printed material placed on Press/Media/Billboards etc.

## FORMAT

- ❖ Display of representative segment in refueling station
- ❖ Display of contact information (e.g. website for further details)



## Moving to Activity 3

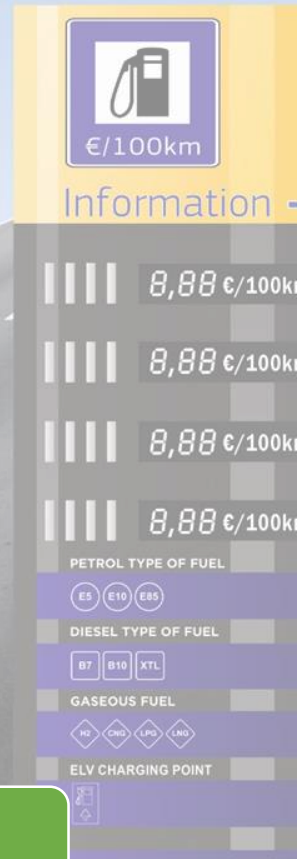
The fuel cost is second most important parameter when buying a new vehicle

The perception of fuel costs can differ between MS

Simple and easy-to-compare prices could enable consumers to use alternative fuels

At a filling station, consumers prefer to be able to compare fuel prices while they refuel/recharge their vehicle

The results of the online survey serve as a basis for designing Pilot Actions in Activity 3



***Thank you for your attention!***



A vertical panel on the right side of the slide, partially overlapping the road image. It features a yellow header with a fuel pump icon and the text '€/100km'. Below this is the word 'Information' followed by a dash. The panel contains four rows of fuel price information, each with a bar chart and the value '8,88 €/100km'. Below these are sections for 'PETROL TYPE OF FUEL' (with options E5, E10, E85), 'DIESEL TYPE OF FUEL' (with options B7, B10, XTL), 'GASEOUS FUEL' (with options HC, CNG, LPG, LNG), and 'ELV CHARGING POINT' (with a charging icon).

*For more information please contact your MS representative or visit the official PSA website.*