

RAA Member Panel

Fuel Survey

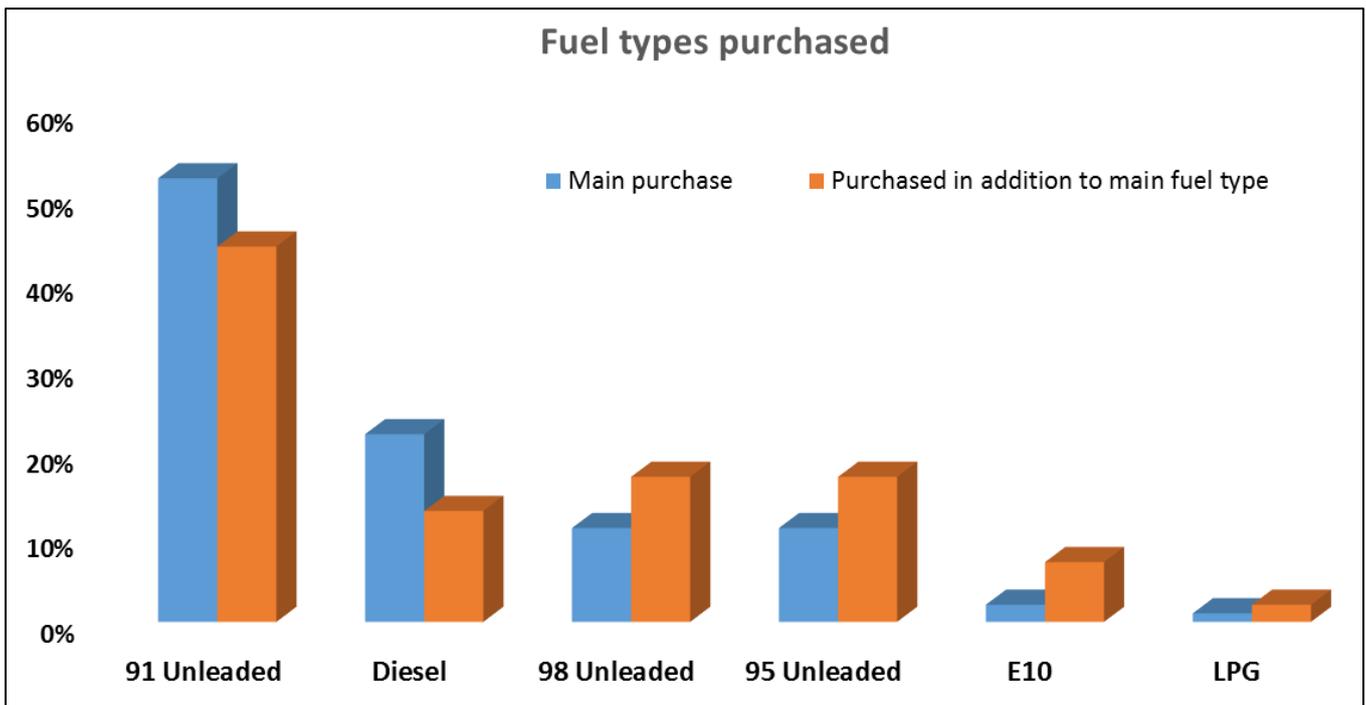
In December 2018 RAA conducted an online survey regarding the impact of rising fuel prices on the lifestyle and mobility of South Australians. Daily prices for unleaded petrol during the time of the survey were approximately \$1.40/Litre.

The survey was distributed via email and RAA social media (Facebook and Twitter), with responses collected from 4th-18th December 2018. The sample size was 1401 individuals based on the total number of responses received.

Current fuel habits

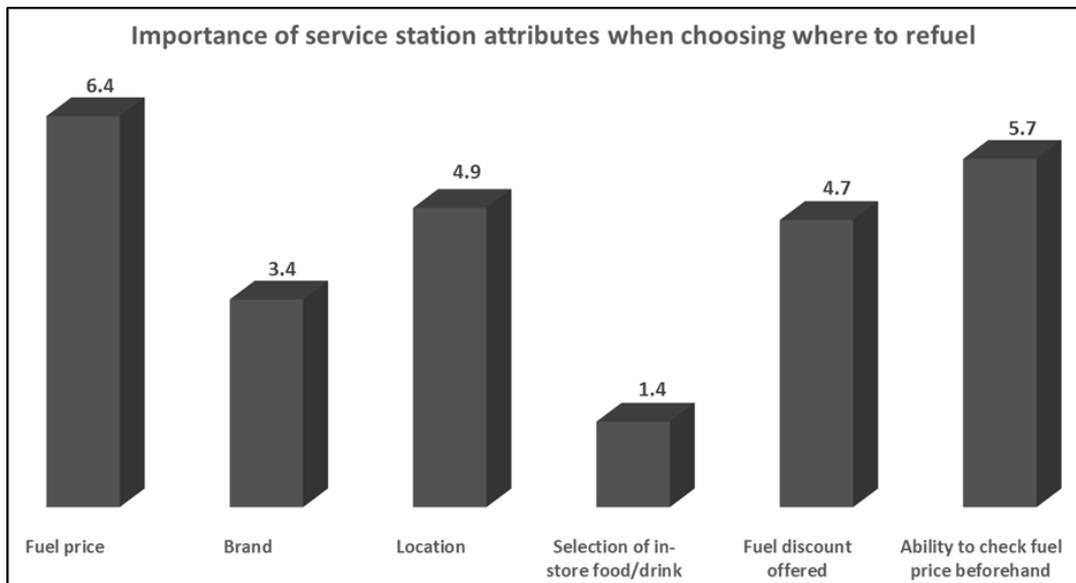
Almost a quarter (23%) of respondents used a Caltex Woolworths service station the last time they refuelled, and 91 unleaded was the main fuel type purchased by 52% of respondents. Respondents indicated they were unlikely to have used a fuel discount voucher, with only a third having done so with their last fuel purchase.

Diesel was the 2nd most common fuel type purchased, with 22% of respondents purchasing this product as their main fuel source. The least purchased fuel types were E10 and LPG.



When choosing where to re-fuel, fuel price is the most important factor, followed by the ability to check the fuel price before refuelling. The selection of food and drink available at the fuel outlet was considered least important, followed by the brand of fuel outlet.

BP fuel was more likely to be perceived as above average quality compared to other brands, while Costco fuel was perceived as below average quality by approximately 20% of respondents.



**Values shown are the average rating out of 7 (where 1 = Not at all important and 7 = Extremely important).*

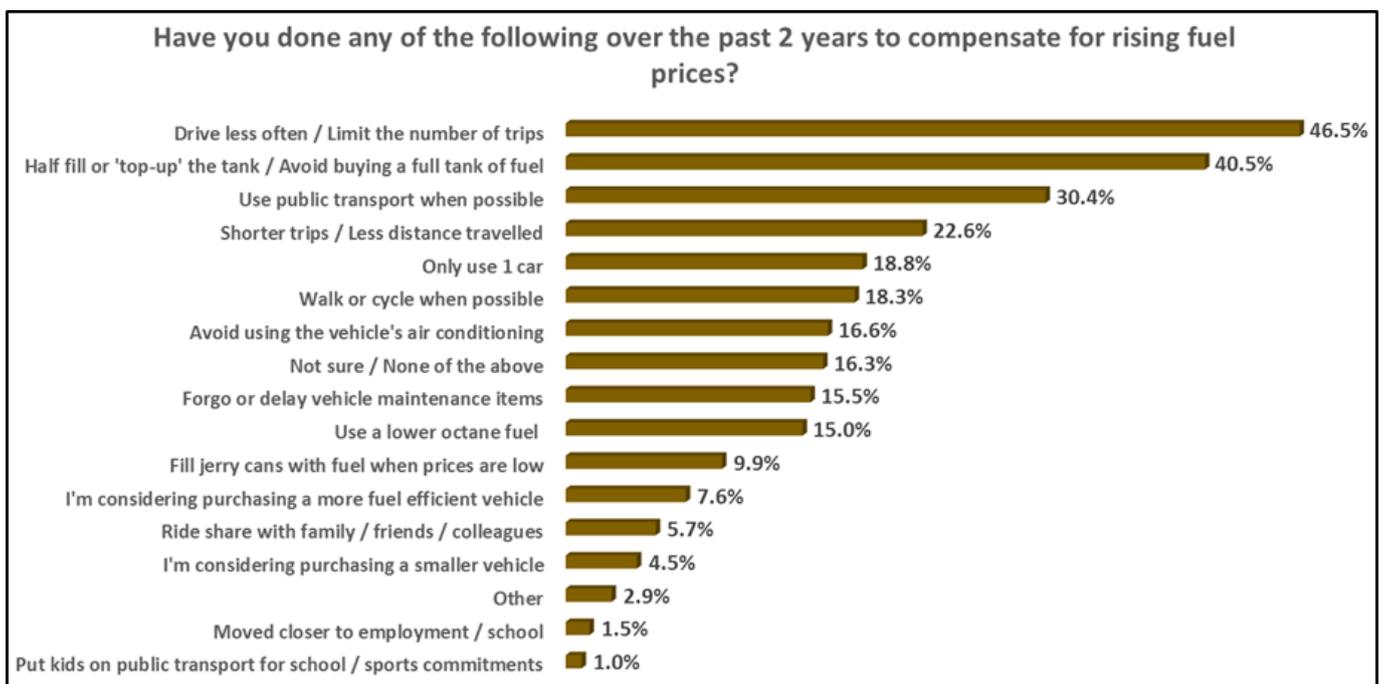
Attitudes towards increasing fuel prices

In 2016 the average cost of unleaded petrol was below \$1.20/litre, while daily prices for unleaded petrol during the current survey were sitting at more than \$1.40/litre. Almost all respondents (95%) indicated that they are concerned to some extent about rising fuel prices in South Australia.

When asked whether they had undertaken any measures over the past 2 years to compensate for rising fuel prices, almost half of respondents indicated that they now 'drive less often/limit the number of trips' and/or 'half fill or top-up the tank to avoid buying a full tank of fuel'. A third of people were more likely to use public transport now whenever possible.

In terms of cost of living expenses, around a third of people have reduced spending on recreation and travel due to rising fuel prices, and 21% indicated they were now spending less on clothing and footwear to compensate for fuel prices.

Around 50% will be looking for the most fuel efficient vehicle when it comes to their next vehicle purchase, a quarter will consider a hybrid, while around 16% will consider an electric vehicle. For 15% of respondents, the cost of fuel will not factor into their next vehicle purchase decision.



Fuel pricing websites

Over the past 12 months most people were unlikely to have checked fuel prices on a website or app before refuelling (43.7%), a further 36% indicated they would check prices sometimes/occasionally before refuelling, and 8% indicated they always use a website or app to check fuel prices.

The introduction of real-time fuel pricing would be considered extremely useful by 42% of respondents, with only 10% indicating that they wouldn't find this service useful at all. The most useful features of a real-time pricing site would be: location-based pricing showing petrol stations close by, followed by price changes being published within 15 minutes. The features considered least important are the ability to filter outlets by amenities available, ability to rate and review outlets, and the ability to share prices with friends or family.

Those who have checked fuel prices over the past 12 months are most likely to have used: PetrolSpy, Motormouth or the RAA website.

