



# POV: CUSTOMER IN THE OIL & GAS INDUSTRY

How data, technology,  
and consumer behavior are  
transforming the industry

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## DIGITAL TRANSFORMATION IS FUELING THE FUEL SECTOR IN BRAZIL

In recent years, Brazil's fuel industry has undergone a profound transformation, driven not only by technological advancements but also by increasingly demanding, informed, and connected consumers. What was once a market driven almost exclusively by price and convenience is now reinventing itself with digital solutions, intelligent loyalty programs, and a strategic race for data and efficiency.

Over the years, a transformation has been particularly noticeable in the technological area, as the industry adopts automation, data usage, and advanced analytics. Here's a timeline highlighting the main milestones of this journey:

- 2000s** **Operational Automation and Internal Systems:**  
The initial focus of digitalization was on internal operations. Gas stations began adopting management systems (ERPs), pump automation, electronic inventory control, and sales reconciliation. The technology aimed at efficiency and control, with little focus on the end customer.
- 2010s** **Physical Loyalty Cards and Fleet Management:**  
This phase saw the emergence of the first loyalty programs, still using physical cards, primarily targeting corporate clients and fleets. It marked the beginning of relationship strategies but with little personalization.
- 2015 ONWARDS** **Apps and Digital Payments:**  
The popularization of smartphones ushered in a new era for the sector. The first gas station apps appeared, offering features like location services, fueling history, QR code payments, and integration with points programs. Structured data collection on consumption began.

2018  
2020

### Integration with Digital Ecosystems and Virtual Wallets:

Fuel networks started integrating with fintechs, digital banks, and mobility platforms, offering cashback, real-time points, and new payment methods. Digitalization began impacting the consumer experience.

2020  
ONWARDS

### Data Explosion and Personalization via Analytics:

With a higher volume of data, companies began applying customer and marketing analytics to understand behavior patterns, segment clients, personalize offers, and improve retention. Loyalty programs became more sophisticated and strategic.

2023 +

### AI, Predictive Algorithms, and Smart Dashboards:

The adoption of artificial intelligence, machine learning, and real-time monitoring dashboards enables faster, data-driven decisions. Demand forecasting, churn detection, dynamic pricing, and campaign optimization are already realities in some networks.

Today, gas stations have evolved from mere fueling points to true hubs of experience, relationship, and personalization. **The sector's digitalization has paved the way for new forms of customer engagement**, offering integrated services, payment apps, cashback, and platforms that combine mobility, convenience, and rewards.

In this new scenario, customer analytics and marketing analytics take center stage. Data analysis applied to consumer behavior allows for more precise decisions, more relevant offers, and loyalty strategies that truly work. The combination of technology, data, and market intelligence is reshaping how networks and brands understand and interact with their customers.

## THE CHANGING CONSUMER BEHAVIOR AND ITS IMPACT ON THE OIL & GAS SECTOR

We are witnessing a transformation in how consumers relate to brands, products, and services. Driven by technological advancements, easy access to information, and increasingly personalized experiences, this behavioral change demands a new approach from companies. Today's consumer is not just digital; they are hyper-connected, well-informed, and intolerant of poor experiences.

**ACCORDING TO A PWC SURVEY, 73% OF CONSUMERS CITE EXPERIENCE AS ONE OF THE MAIN FACTORS IN PURCHASE DECISIONS, SURPASSING EVEN PRICE.**

Previously, offering a good product or friendly service was sufficient; now, it's essential to go further: deliver real value, maintain consistent digital presence, ensure a seamless multi-channel journey, and, above all, actively listen to the customer. Digitalization has accelerated expectations for quick responses, intuitive interactions, and tailored solutions, raising the consumer's level of demand. This more discerning behavior is also reflected in the low tolerance for failures.

The CX Trends 2025 report indicates that **84% of Latin American consumers would switch brands after a single bad experience**. This underscores how critical customer experience has become for differentiation and loyalty.

In response, more organizations are shifting their business logic towards customer-centricity. Data from SuperOffice shows that customer-centric companies are 61% more profitable. This new mindset requires technological tools and a profound cultural change to place the customer at the center of decisions, strategies, and innovation.

Now, the challenge for companies is to keep up with this new pace. This means rethinking strategies, investing in technology like artificial intelligence, adopting a customer-centered and data-driven approach, and, most importantly, maintaining a humanized experience. Understanding this new consumer profile is essential for staying relevant in an increasingly competitive market.

## CUSTOMER ANALYTICS: A STRATEGIC ALLY FOR UNDERSTANDING AND PERSONALIZING CUSTOMER EXPERIENCE

Given the increasing competition in the fuel station sector and the changing behavior of more digital and demanding consumers, understanding the customer has shifted from being a competitive advantage to a matter of survival.

In this context, Customer Analytics emerges as a strategic ally for gas stations to better understand their consumers and make smarter, targeted decisions.

**Customer Analytics involves collecting, analyzing, and interpreting data** about customer behavior to generate actionable insights, transforming data into decisions and decisions into results.

Data analysis allows for a deep understanding of customer behavior and profiles. By analyzing consumption data, visit frequency, product preferences, and payment methods, managers can identify their main audiences and how they interact with the business. This enables everything from repositioning products in the convenience store to adjustments in the service journey.

Understanding customer profiles allows for the identification of consumption patterns, such as peak hours, average ticket per customer type, and products with higher turnover on specific days or times. Recognizing these patterns helps optimize operations, adjust staff schedules, better manage inventory, and increase point-of-sale efficiency.

Moreover, Customer Analytics enables much more accurate personalization of campaigns and offers, both for fueling and convenience store products and services. It's possible to create customer segments based on consumption history and offer specific promotions that truly make sense, increasing conversion chances and customer satisfaction.

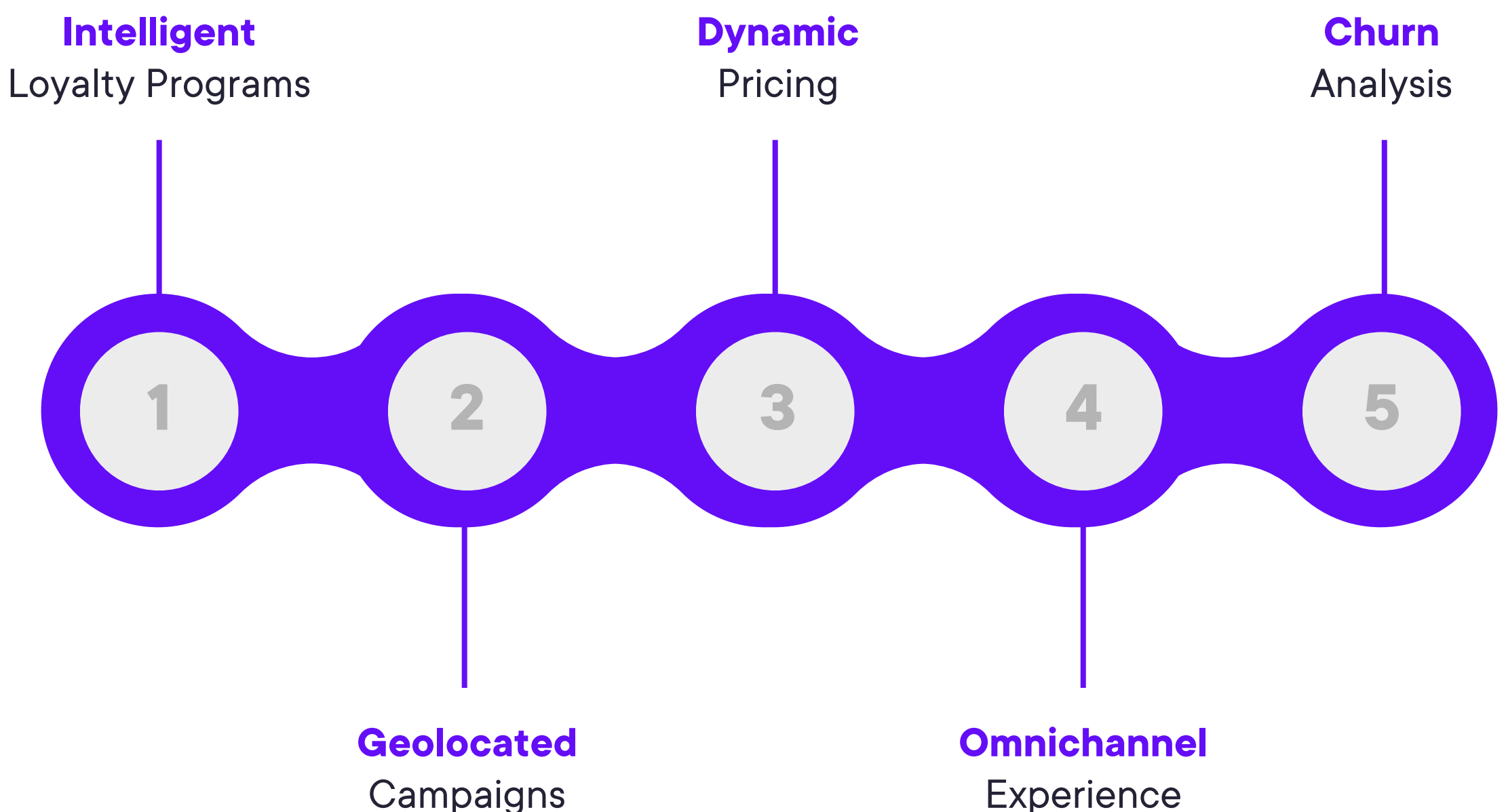
In summary, **Customer Analytics transforms scattered data into strategic decisions, making management smarter, marketing more effective, and customer experience more aligned with expectations.** For fuel stations aiming to remain relevant in a constantly evolving market, it's time to view the customer not just as someone who fuels up but as someone who can be understood, valued, and retained intelligently.

## HOW TO APPLY CUSTOMER ANALYTICS TO FUEL STATION SEGMENTS?

According to McKinsey, 71% of consumers expect personalized interactions, and 76% feel frustrated when this doesn't happen. Simultaneously, companies that adopt personalization strategies and offer consistent experiences can reduce customer acquisition costs by up to 50%, increase revenues by 5% to 15%, and boost ROI by 10% to 30%. In this new context, data, technology, and market intelligence are the pillars supporting the best Customer Experience (CX) practices.

**In the oil and gas industry, especially in fuel retail (gas stations), this revolution is also underway.** The consumer who previously sought only to refuel now expects a smooth, digital, safe, and, if possible, rewarding journey.

Consequently, fuel station networks investing in CX gain a real competitive advantage, **translating into practical initiatives with direct business impact:**



## 1. Intelligent Loyalty Programs

Instead of generic bonuses, loyalty programs now use **predictive analysis and behavioral segmentation to reward the right customer** at the right time with the most relevant benefit. This increases perceived value and return frequency.

**Impact:** According to a Bain & Company study, loyal customers tend to buy up to 67% more than new customers, increasing the company's average ticket.

## 2. Geolocated Campaigns

By combining geolocation and real-time data, **stations can send push notifications with personalized offers to customers physically nearby** — for example, offering a fuel discount or free coffee to attract them to the store.

**Impact:** Zendesk's CX Trends research indicates that 81% of respondents spend more with companies offering a seamless and integrated conversational experience.

## 3. Dynamic Pricing

Inspired by pricing models from airlines and mobility apps, dynamic pricing allows for price adjustments based on variables like demand, local competition, and customer consumption profiles, all managed by algorithms and AI.

**Operational Benefit:** According to a PwC study, a good experience can increase product and service prices and customer loyalty by up to 23%.

## 4. Omnichannel Experience

Today, a customer might start their journey on an app, receive an offer via WhatsApp, and complete the purchase at a physical station, **all with integrated and consistent communication**. This requires connected CRM and CDP platforms, along with real-time marketing automation.

**Impact:** McKinsey reports that omnichannel consumers spend up to 34% more per transaction.

## 5. Churn Analysis

**By analyzing historical data and employing machine learning**, it's possible to identify customers at risk of leaving, whether due to decreased frequency, volume, or average ticket, and activate specific campaigns to win them back.

**Impact:** Bain & Company shows that investing in the customer-company relationship is crucial, as a small increase in customer retention rates (just 5%) can boost profits by up to 95%.

# MEASURING CUSTOMER EXPERIENCE TO GUIDE BUSINESS STRATEGIES

Measuring customer experience isn't simple but is essential for understanding and improving consumer relationships. Companies excelling in this process typically use **KPIs (Key Performance Indicators) to monitor customer satisfaction, loyalty, and behavior.**

## 1. Net Promoter Score (NPS)

NPS is one of the most popular corporate metrics for **measuring customer satisfaction and loyalty.** It is based on the question: “On a scale of 0 to 10, how likely are you to recommend our company/product to a friend or colleague?” This indicator is crucial for assessing customer perception of the brand/company and can guide company strategies.

## 2. Customer Satisfaction Score (CSAT)

CSAT is an essential metric for measuring immediate customer satisfaction after a specific interaction. It's usually based on a simple question like: “How satisfied were you with today's service?” For gas stations, this can be applied after fueling or the convenience store experience. CSAT offers a more immediate and direct view of satisfaction levels regarding a specific interaction, **allowing for quick adjustments and continuous improvements in customer service.**

## 3. Lifetime Value (LTV)

LTV measures the total value a customer generates during their time with the company. For gas stations, this can include total fuel purchases, convenience store products, and even the use of additional services (like car washes). **Knowing LTV helps justify investments in loyalty and personalize strategies to maximize each customer's value throughout their journey.**

## 4. Customer Acquisition Cost (CAC)

CAC calculates how much is spent to acquire a new customer. In the fuel sector, this can include expenses on digital marketing, promotions, and loyalty campaigns. Keeping CAC in mind allows companies to **adjust strategies to ensure that acquisition costs are always lower than the value each customer will generate over their journey (LTV).**

## 5. Return Rate and Visit Frequency

The return rate (or retention rate) measures how many customers return to the gas station after their first visit. Visit frequency indicates the average number of times a customer visits the station within a specific period. Both metrics are crucial for  
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# Use of Real-Time Dashboards for Agile Decision-Making

In a business environment as dynamic as fuel retail—where factors such as market prices, weather, and local events can directly impact demand—it is essential to make quick and informed decisions. Real-time dashboards are indispensable tools for providing a clear and immediate view of performance metrics. **With integrated dashboards, it is possible to monitor, for example:**

- The number of customers in real time
- Immediate satisfaction with service (post-interaction NPS)
- Loyalty program performance
- Churn rate and the impact of retention campaigns

This data visualization allows managers to adjust strategies swiftly, such as modifying prices in real time to optimize competitiveness or changing marketing communication based on customer responses.

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## Integration of CRM, POS, Apps, and Social Media Data

Data integration is another key pillar for efficiently managing the customer experience. In a gas station, customer interactions don't happen only at the physical point of sale. CRM (Customer Relationship Management), POS (Point of Sale) systems, mobile apps, and social media provide a continuous data stream which, when combined, offers a holistic view of customer behavior and preferences.

### For example:

- **CRM** can log visit history and interactions, enabling personalized offer delivery.
- **POS** provides information about sales volume and purchased products, as well as indicating which items are most appealing.
- **Mobile apps and social networks** can provide data on customer engagement with digital promotions and loyalty campaigns.

This data integration **allows fuel stations to anticipate customer needs**, send personalized offers, and even adjust promotions in real time based on behavioral data. Additionally, it helps identify customers at risk of churn, enabling activation of targeted retention campaigns.

## Dhauz in Practice – Success Case



### CHURN PREVENTION WITH PREDICTIVE NPS AND AI IN TELECOMMUNICATIONS

Dhauz used predictive NPS combined with advanced machine learning and artificial intelligence techniques to **map customer mindset and experience in a telecommunications company**. Through forecasting, it was possible to identify the main friction points that led to customer detractors and determine the importance of each.

With this insight, the company assigned two dedicated customer service squads: one for customers with a high probability of churning and another for those repeatedly affected by the top friction points identified by the model. This hybrid approach enabled proactive corrective actions, improved service efficiency, and enhanced customer engagement and retention.



### SMART SEGMENTATION AND JOURNEY PERSONALIZATION IN MOBILITY RETAIL

Aiming to increase market share and improve the shopping experience, Jetson, with support from Dhauz, **enhanced its service model by understanding its customers and what each profile values most**.

Through detailed segmentation and data analysis, we refined communication strategies, optimized the product portfolio, and expanded brand reach in the electric mobility market. Personalizing the journey increased sales, reduced inventory of low-demand products, and brought new insights for the creation of future products.

# The Future Has Already Arrived—And It Belongs to Those Who Know Their Data

**We are witnessing a turning point in the gas station sector.** It's no longer just about selling fuel. It's about understanding who is fueling up, how they consume, and what they seek beyond fuel.

**1** Data is the competitive edge in business—not just any edge, but one that is smart, long-lasting, and hard to replicate. Those who know their customers deeply can anticipate behavior, create unique experiences, stand out for service quality, and build relationships that withstand competitor price wars.

**2** Ignoring customer behavior is expensive. And the biggest cost isn't in the visible errors, but in the missed opportunities: the customer who didn't return, the offer that didn't convert, the slow-moving stock. Data science transforms uncertainty into precision, into results, into loyalty, and into uniquely positive experiences.

**3** The sector is changing fast—and it won't wait for anyone. Digital, connected, consumer-centric. The gas station of the future is already being designed, and those who start now will have time to learn, adapt, and lead. Waiting opens space for those who already understand that data is not a trend—it's the foundation of strategy.

The adoption of Customer Analytics in the gas station segment is not just about **implementing technology to digitize processes**. It's about redefining your place in the market by deeply understanding who your consumers are and what they seek—transforming businesses and offering the best customer experience beyond fuel.

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We want to hear about your experience, exchange ideas, and learn from different perspectives.

**Let's talk!**