

Certas Energy
Shell Station: Argyll Road
Aberdeen Airport

Customer Profiling Research Report
December 2015

Research & Reporting by

Taylor McKenzie Research & Marketing Ltd (TMcK)

TMcK



Executive Summary Page Aberdeen Airport

Introduction

The following report outlines the findings from a customer research interviewing program carried out between Thursday 26th November and Sunday 6th December 2015 at Shell Station Argyll Rd, Aberdeen. The research explored the buying behaviours of persons resident in the locality of the site. Customers were asked to provide information on; their place of residence in relation to the premises, their means of travel to the premises and their purchasing behaviour in relation to fuel and groceries.

This summary page contains the results from the key objective of the research as outlined below.

Key Research Objective

[Section 123(5) seeks to determine, as interpreted in the Opinion of the Inner House of the Court of Session in *BP Oil UK Limited v City of Glasgow Licensing Board and City of Edinburgh Licensing Board* (5th April 2011) whether a recognisable number of persons in the locality see and treat the said premises as the principal source from which they, in ordinary course, purchase groceries or fuel and who would properly consider themselves materially disadvantaged or inconvenienced were these retail facilities to no longer be provided from said premises.

Materially disadvantaged or inconvenienced?

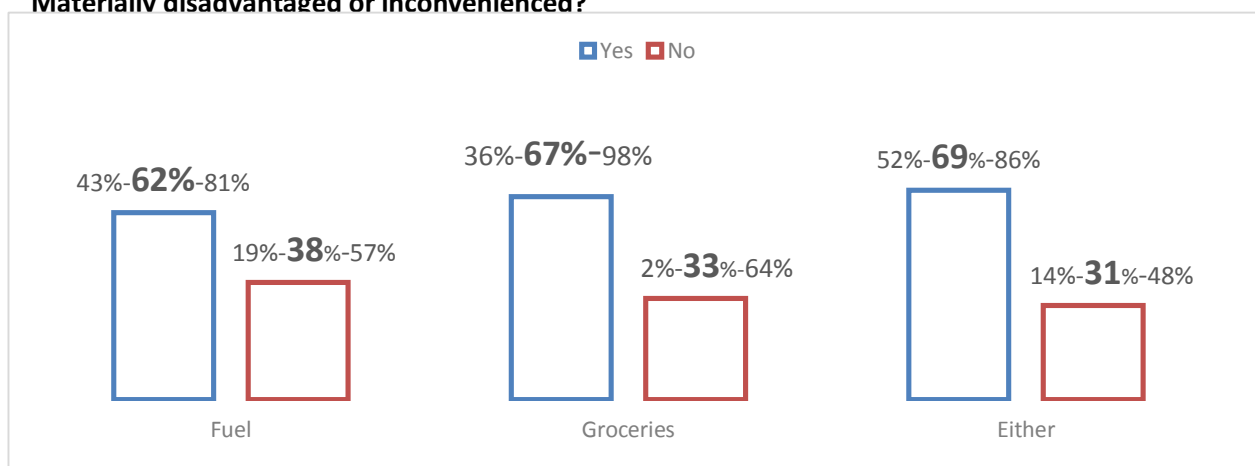


Figure 9 – Fuel Base 26

Groceries Base 9

Either Base 29

Conclusion

The results show that a statistically significant* proportion of persons (69% (+/- 16.83%) in the locality) see and treat the Shell Station on Argyll Road as the principal source from which they, in ordinary course, purchase groceries or fuel and would properly consider themselves materially disadvantaged or inconvenienced were these retail facilities to no longer be provided from said premises.

* Statistically significant - In statistics, a result is called **statistically significant** if it is unlikely to have occurred by chance. The likelihood that a result or relationship is caused by something other than mere random chance.

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Research Methodology

Aberdeen Airport

A quantitative research study was carried out at Shell service station on Argyll Road, Aberdeen Airport between Thursday 28th November and Sunday 7th December 2015 with 915 customers (or 'participants'), all of whom were selected as they were exiting the store. Fieldwork was stratified to cover the core hours of off-sale of alcohol on the premises 10am until 10pm.

The structured questionnaire (please see Appendix 2 for full questionnaire) was executed via Computer Assisted Personal Interviewing (CAPI) with the use of an iPad. The screen was shared with participants so that they could view all images and questions. All participants were asked to give their full postcode in order to help map travel time and distance to location.

Sample Size

All intercepts (interviews) were conducted as participants were exiting via the main front entrance/exit; participants were selected at random to ensure sampling confidence. Upon completion of each survey, interviewers were under strict instruction to approach the second customer that passed them. By completing 915 interviews with current service station users we can be sure that the data and attitudes collected will be statistically representative of the customer base. Importantly this large number of 'base' participants allowed for statistical comparison of sub-groups. **An important sub-group within this research that will form the 'population of interest' are participants who live within the locality of the premises AND use the garage as their principal source for purchasing Fuel or Groceries [Base – 29]. This figure represents 2.8 % of the entire customer population and in comparison to other stations researched, it is low.**

In order to increase the base number of 29 to a more appropriate amount for statistical purposes, response gathering would have to be conducted over a further 10 or so days. This is neither practical in terms of overall cost and timescale. **Therefore for the purpose of the report and due to the unique location of the station 'local' responses were boosted in 4 of the 12 shifts by individuals who coded living under 10 miles from the station – geocoding confirmed that on average these individuals (Base 29) lived only 2.95 miles from the station.**

Population of Interest

This sub-group of 29 participants will be used to answer the key objective of the research. Whether a recognisable number of persons in the locality see and treat the said premises as the principal source from which they, in ordinary course, purchase groceries or fuel and who would properly consider themselves materially disadvantaged or inconvenienced were these retail facilities to no longer be provided from said premises.

Defining the Population of interest

Q2 – How far from this Station do you live? (Map 1)

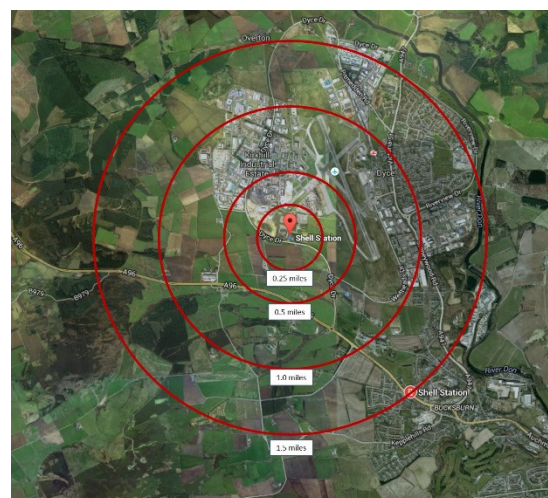
Within 10 miles = continue

10+ miles = record postal code & close

Q7 – In the ordinary course of your purchasing habits, do you treat these premises as the principal source of: a) Petrol or DERV (Fuel)? b) Groceries?

Yes to a) *or* b) = Continue

No to a) *and* b) = Close



Map 1

Research Findings – Locality

Aberdeen Airport

Locality to Premises

Q2 – How far away from this Service station do you live?

If codes 1-3 were selected (under 1.5 miles) then respondent was categorised as **living within the locality**. Due to the proximity of the station to the airport it became clear that those in the 'locality' may actually live further out, therefore for 4 shifts those who coded 10 miles or under were allowed to proceed with the survey.

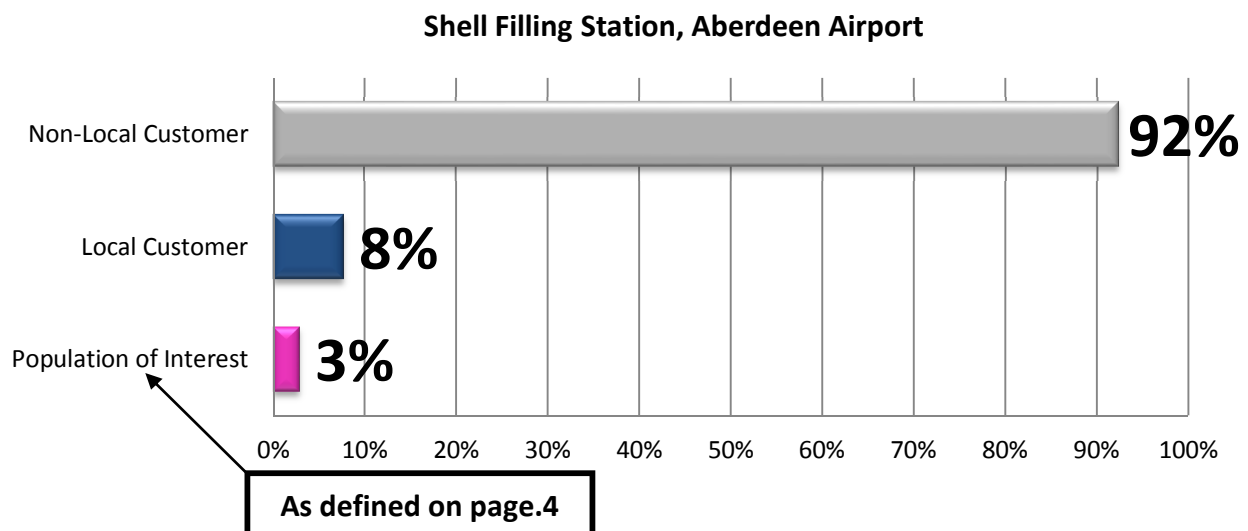
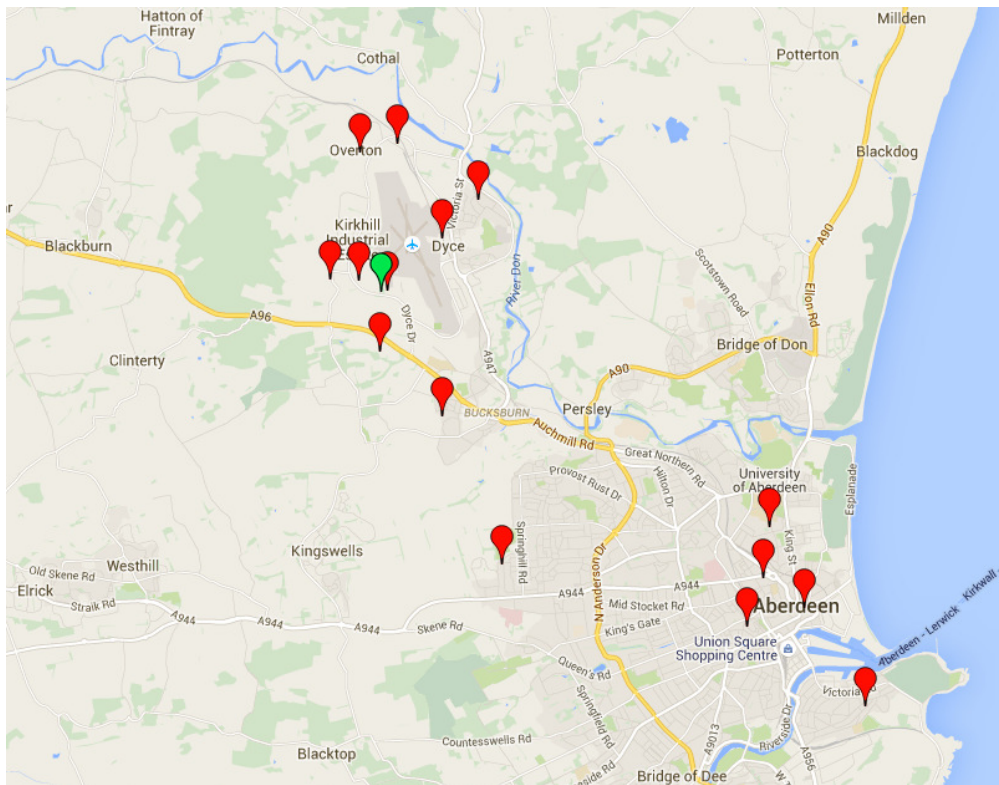


Figure 2 – Base - 915

Research Findings–Geo-mapping Aberdeen Airport

All participants were asked to provide their postcode in order to allow for them to be geo-tagged on a map. Out of the 29 participants who fell into the population of interest 27 provided a full and complete postcode. They are represented below as red icons, in some cases the same postcode has been given and will be represented by only 1 icon.

Average distance from Aberdeen Airport Shell Service Station – 2.7 miles



Map 2

Analysis of the postcode data has shown that the participants from the 'population of interest' live within a locality of 2.7 miles on average

Research Findings – Demographics

Aberdeen Airport

Gender

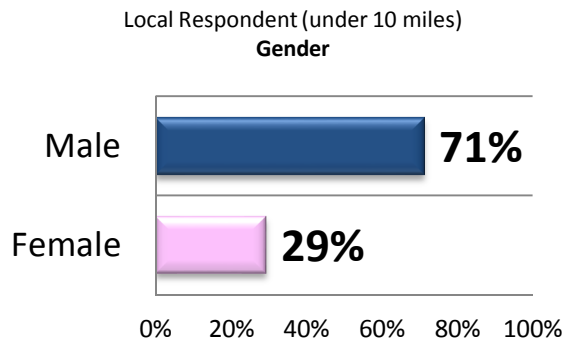


Figure 3 – Base 72

Average visits per week

Grocery Shopping Base - 30	1.8 visits per week
Fuel Purchase Base - 66	1.7 visits per week

Table 1 – Base varied

Age

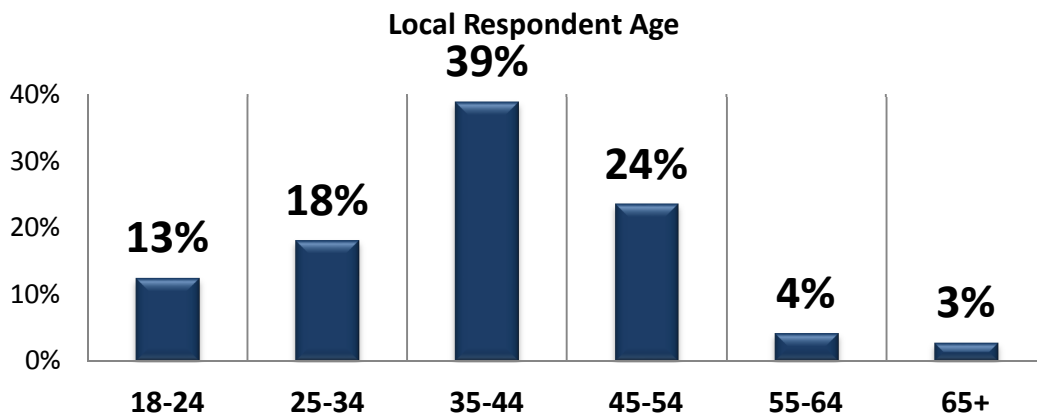


Figure 4 – Base 72

Respondent travel habits

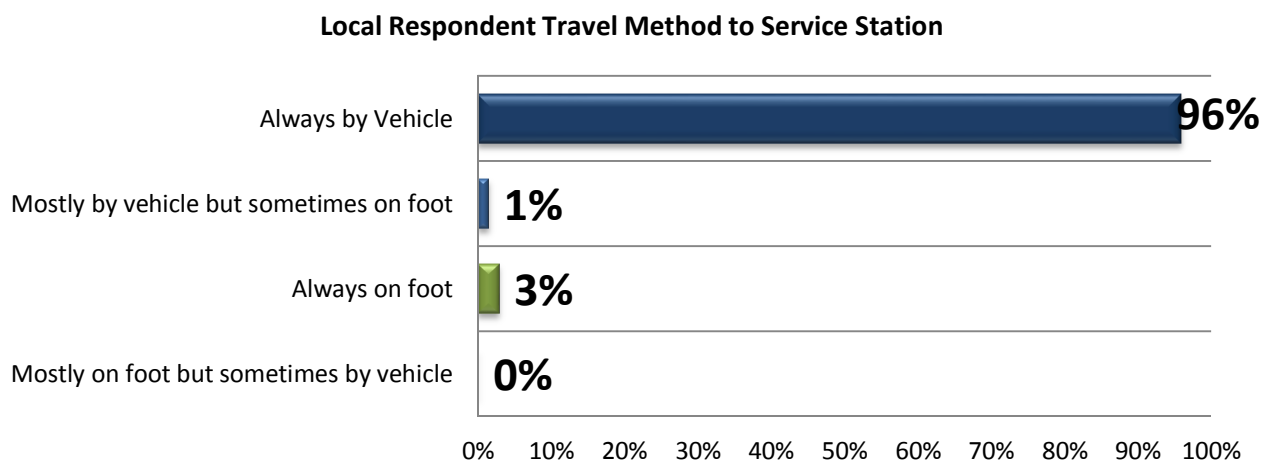
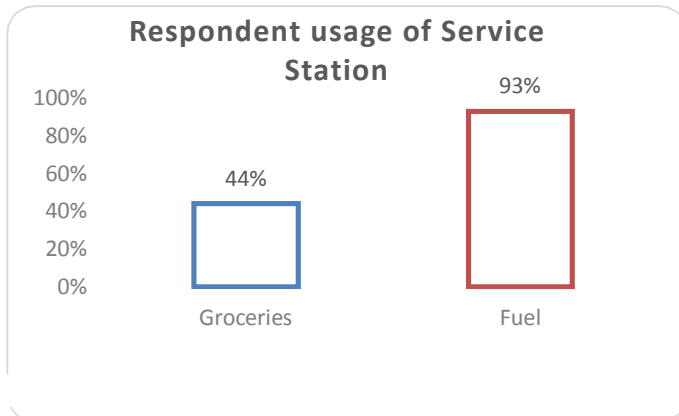


Figure 5 – Base 72

Research Findings – Premises Usage Aberdeen

Airport

How Aberdeen Airport service station is being used



32 participants (44%)

Use service station as a source of **Groceries**

67 participants (93%)

Use service station as a source of **Petrol/DERV (Fuel)**

Figure 6 – Base 72

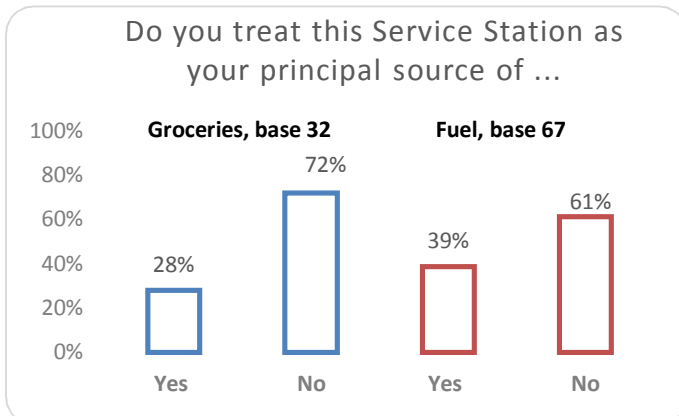


Figure 7

Defining the population of interest

Participants, who live within the locality (within 10 miles) of the service station [Base 72], were asked how they currently use the Service Station – **Figure 6**.

They were then asked if, in the ordinary course of their purchasing habits, they treated this Service Station as their principal source of Petrol/DERV or Groceries – **Figure 7**.

40% / Base 29 participants answered 'yes' to treating the service station as their principal source of either groceries or fuel. This forms the population of interest as outlined in the introduction.

**Population of interest
Base of 29 participants**

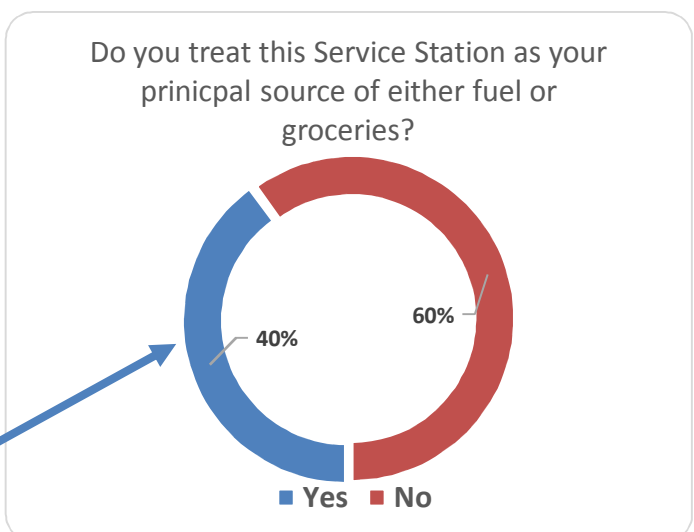


Figure 8 – Base 72

Research Findings – Key Findings

Aberdeen Airport

Once the population of interest had been defined (Base 29), these participants were asked:
Would you consider yourself materially disadvantaged or inconvenienced were this premises to be unable to provide you with: a) Petrol or DERV (Fuel)? b) Groceries?

Materially disadvantaged or inconvenienced?

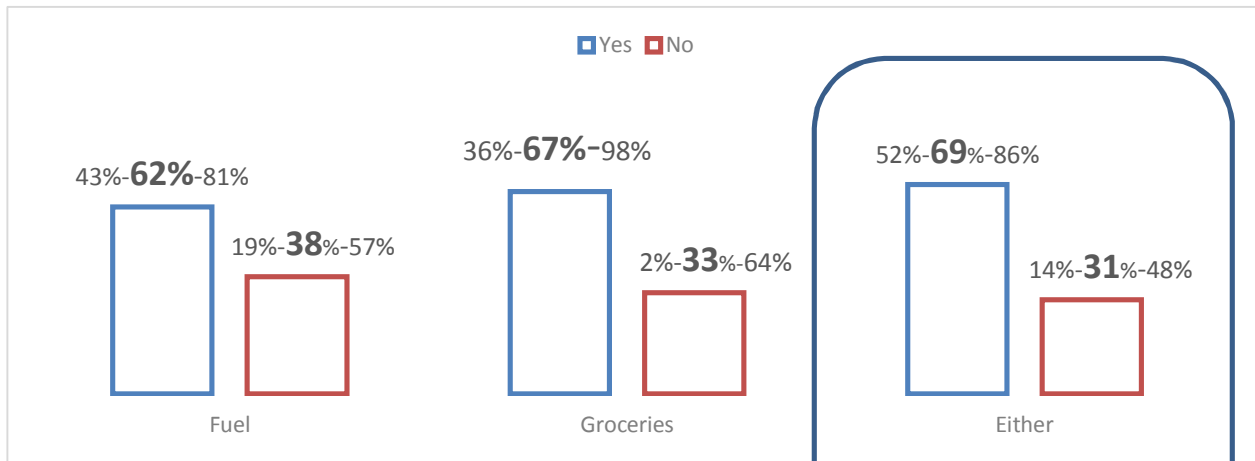


Figure 9 – Fuel Base 26

Groceries Base 9

Either Base 29

The results show that a statistically significant proportion of persons in the locality (69%) see and treat the premises as the principal source from which they, in ordinary course, purchase groceries or fuel and that they would properly consider themselves materially disadvantaged or inconvenienced were any of these retail facilities to no longer be provided from said premises.

Bases explained

Fuel: Overall 26 participants from the locality stated that they used the station as their principal source of fuel, of these participants 62% (15) stated that they would be materially disadvantaged if the premises could no longer provide them with fuel.

Groceries: Overall 9 participants stated that they used the station as their principal source of groceries, of these participants 67% (5) stated that they would be materially disadvantaged if the premises could no longer provide them with groceries

Either: The combined base and response for fuel and groceries.

Research Findings – Key Findings

Aberdeen Airport

In order to qualify this result all participants who coded yes to being materially disadvantaged if the service station could no longer provide fuel were asked **‘Would you have an alternative fuel source you could use?’ Base 15**

Yes – 93%

No – 7%

Those who answered ‘Yes’ to having an alternative fuel source - 93% (Base 14) were then asked: **Is this alternative fuel source available to you without causing you to be disadvantaged or inconvenienced in any way?**

Yes – 77%

No – 23%

Results show that the alternative fuel sources available to 93% of participants would cause 23% of this group to be further inconvenienced.

Then all participants who coded yes to being materially disadvantaged if the service station could no longer provide groceries were asked **‘Would you have an alternative grocery source you could use?’ Base 5**

Yes – 100%

No – 0%

Those who answered ‘Yes’ to having an alternative grocery source - 100% (Base 5) were then asked: **Is this alternative grocery source available to you without causing you to be disadvantaged or inconvenienced in any way?**

Yes – 80%

No – 20%

Research Findings – Key Findings

Aberdeen Airport

The graph below highlights participants who live locally and use the garage as their principal source of either fuel or groceries and who, after considering local alternatives, still feel they would be materially disadvantaged or inconvenienced if the premises could no longer provide them with either.

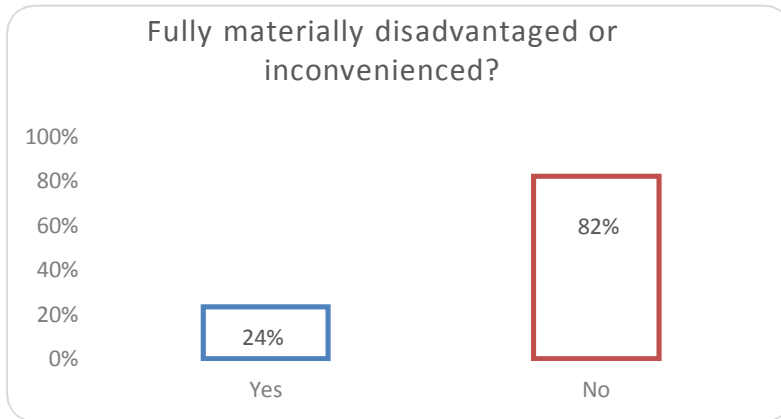
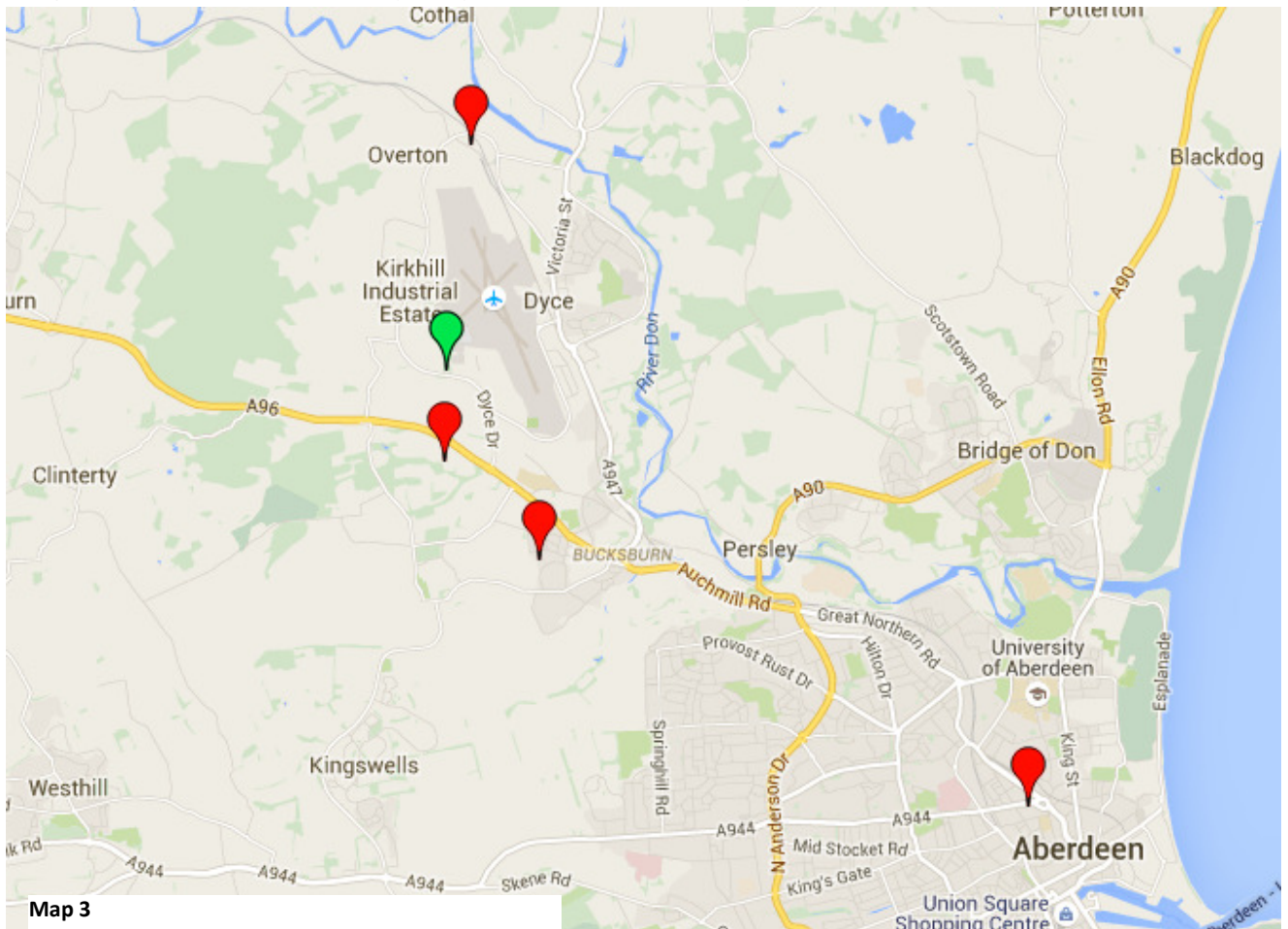


Figure 10, Base 17

The geo-map below shows where all participants (base 4) who coded 'yes' live.



Research Findings – Key Findings Aberdeen Airport

The graphs below highlight the demographic of those who are materially disadvantaged or inconvenienced after having considered local alternatives.

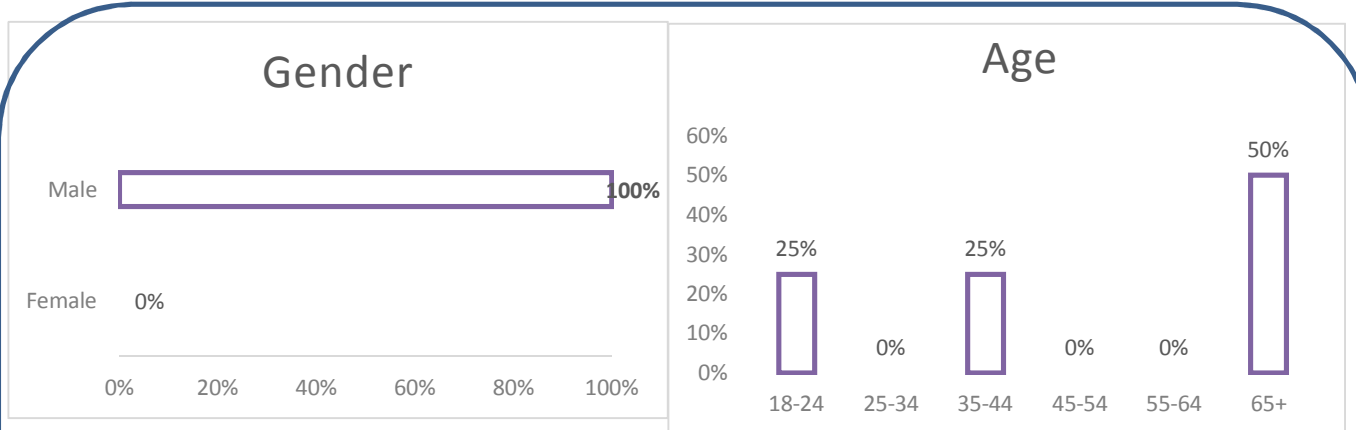


Figure 11 – Base 4

Figure 12 – Base 4

Average visits per week

Grocery Shopping <i>Base 1</i>	2.5 visits per week
Fuel Purchase <i>Base 4</i>	4.3 visits per week

Table 2 – Base Varied

About TMcK

Taylor McKenzie Research & Marketing (TMcK) are a full service agency and provide all stages in the market research process from fieldwork and recruitment, through to interviewing and analysis of data. We are also proud to host one of the UK's best viewing facilities, known as 'The Glasgow View'.

Based in Glasgow since formation in 2001 our steady growth over the past twelve years has been down to the dedication of our skilled, reliable and creative staff.

TMcK's research team is headed up by Research Director Nicky Taylor who has extensive knowledge of consumer research in Scotland. In the past 12 months he has headed up similar quantitative research projects for KPMG, Tennents, AXA amongst others. Nicky acts as the main contact for client and will attend briefings and debriefs and will be aided in the completion of the project by research executive Lisa Dixon and TMcK field. TMcK are Company Partners of the Market Research Society and abide by their code of conduct.

This demonstrates that we are one of a small number of Scottish companies who work with the Market Research Society in ensuring that quality standards are consistently upheld within the research industry.

Research Director Nicky is the current chair of the MRS Scotland committee.

About Market Research Society (MRS)

In the competitive world of market research, one name assures you of instant recognition and respect - that of MRS.

MRS is the 'voice of your profession'. Their role is to represent and communicate good practice in research to the business community, government and the public; to award accreditation and to provide support for our members.

Professional standards

All members of the Society must comply with the [MRS Code of Conduct](#) which is enforced through a disciplinary process. This is the primary means by which market research remains a self-regulated profession. A range of guidelines and advisory services provide support to members in practical implementation of the *Code*.

The *Code of Conduct* embodies the principles of confidentiality and transparency. It provides protection to research users, participants and to researchers themselves. The *Code* has the confidence of the business community, government and regulators. It embraces the principles of data protection legislation. Membership of MRS is your way of showing that you subscribe to these ethical and legislative principles.

Appendix 1 – Research Background

The Licensing (Scotland) Act 2005 defines premises that operate in whole or in part as a garage for the sale of petrol or derv as “excluded premises”. Subject to the provisions of section 123(5) of the Act, garage premises are “excluded premises”. Where premises are “excluded premises”, sale of alcohol is not permitted. The Client wishes to explore the motivations and buying behaviours of the consumers who visit affected forecourt premises with the purpose of ascertaining whether or not their forecourt premises fall to be determined as “excluded premises” or within the exception contain under section 123(5). Section 123(5) seeks to determine, as interpreted in the Opinion of the Inner House of the Court of Session in *BP Oil UK Limited v City of Glasgow Licensing Board and City of Edinburgh Licensing Board* (5th April 2011) whether a recognisable number of persons in the **locality**¹ see and treat the said premises as the **principal source**² from which they, in **ordinary course**³, purchase **groceries**⁴ or fuel and who would properly consider themselves **materially disadvantaged** or **inconvenienced**⁵ were these retail facilities to no longer be provided from said premises.

Should the research prove that a substantial % of a **representative sample**⁶ local residents who use the outlet as their principal source of groceries and would be materially disadvantaged or inconvenienced if the outlet stopped selling groceries then it would help to form a case to include the outlet as being ‘not excluded’ from the changing legislation.

¹ **Locality** will be defined on a premises by premises basis. This will be determined via respondent answering what will be Q1 (How far away from this station do you live?) and will be confirmed with geo-mapping postcode software. Those living within the chosen distance will be deemed suitable to represent persons living in the locality and they will be further questioned on purchasing habits. Those living out with the chosen distance will be asked for their postcode and interview will be terminated. In this instance with the geography surrounding the premises being dominated by an airport and the associated services the radius for qualification was increased to those living under 10 miles from the forecourt. The average distance was ~3miles.

²⁻³ **Principal source / Ordinary course**; these points must be answered by asking each respondent a question that will be interpreted consistently and fully understood.

Generally speaking, do you treat this premises as your principal source for a) Petrol or DERV (a full description of DERV will be provided in Showcard to help understanding) b) Groceries. A simple yes or no answer will be collected.

This will provide the research with its population of interest.

⁴ **Groceries**; will be defined as being food or other things used within the home.

Appendix 1 – Research Background

(continued)

⁵ **Materially disadvantaged or inconvenienced;** the term materially disadvantaged is perhaps not in the general diction of the average respondent, and we would not expect it to be used by a respondent if asked to describe how they felt about a retail outlet closing. However, when it is combined with the word inconvenienced in the Q. “Would you consider yourself materially disadvantaged or inconvenienced were this premises to be unable to provide you with a) petrol (DERV) b) Groceries?”) we would expect a good understanding. An open question asking why participants would feel materially disadvantaged or inconvenienced will be asked if ‘yes’ is coded at either a) petrol (DERV) or b) groceries. A pilot shift was undertaken in order to gauge any flaws or misunderstandings within the questionnaire.

⁶ **Representative sample;** in quantitative market research studies which are to be conclusive it is very important that the data collected and the findings and recommendations made from the data are representative of the given population. In real terms this means that should the study be repeated at any given time then the results will be similar 95 times out of 100 and within an acceptable margin of error (+/-) %.

In order to achieve this, data collection should be stratified in terms of opening hours and weekend / weekday footfall and respondent selection should be entirely random.

Statistical Representation

In order for the findings to be conclusive it is very important that the data collected, the findings and recommendations made from the data are representative of the given population. In real terms this means that should the study be repeated at any given time then the results will be similar 95 times out of 100 and within an acceptable margin of error (+/-) %.

In order to achieve this, data collection was stratified in terms of opening hours and weekend / weekday footfall and respondent selection was entirely random.

The table below indicates achieved error thresholds for the overall base of participants and for the population of interest base. Error bars are present throughout each table to represent statistical relevance of each figure.

Population	%GIVING PARTICULAR ANSWER		
	10%/90%	30%/70%	50%
Base 915	+ 1.94	+ 2.97	+ 3.24
Base 72	+ 6.93	+ 10.59	+ 11.55
Base 29	+ 10.92	+ 16.68	+ 18.2

Appendix 2 – Research Questionnaire

Good morning/afternoon my name is & I am work for Taylor McKenzie Research & Marketing Ltd, an independent Scottish research agency. We are here today to better understand how this filling station is being used by its customers. We only have a few questions to ask and it is important you help so that we can ensure a representative view of all customers. It should only take 2 minutes.

Q1 Interviewer select filling station

Aberdeen Airport ☐
☐
☐

Q2 How far away from this Service station do you live?

Showcard s2

Within 1/4 of a mile ☐ Go to Q3
 Within 1/2 a mile
 Within 1 mile
 Within 1.5 miles
 Within 1.5 to 2 miles (approx.)
 Within 2 to 10 miles (approx.)
 More than 10 miles away (approx.) CLOSE

Q3 Which of these best describes how you travel to this station?

Showcard s3

Always by vehicle ☐ Go to Q4
 Always on foot ☐ Go to Q4
 Mostly by vehicle but sometimes on foot..... ☐ Go to Q4
 Mostly on foot but sometimes by vehicle..... ☐ Go to Q4
 Other (write in) ☐ Go to Q3

Q4 Including today, in the past 6 months have you used this station as a source of ...

Showcard s4

Interviewer - Read out...

Petrol or DERV (fuel) ☐ Go to Q5
 Groceries ☐ Go to Q6
 Both for Petrol or DERV (fuel) and Groceries ☐ Go to Q5

Interviewer note - if respondent queries what qualifies as 'groceries' please give the following description -
Groceries - 'food or other things used within the home'

Appendix 2 – Research Questionnaire

(Continued)

Q5 How often do you visit this station for the purchase of petrol or DERV (fuel)?

Showcard s5

- Every day..... ☐
- 4 - 5 times a week ☐
- 2 - 3 times a week ☐
- Once a week ☐
- 2 - 3 times a month ☐
- Once a month ☐
- Once every 2 months ☐
- 3 - 4 times a year ☐
- Once a year ☐
- Less often ☐
- First visit ☐

Q6 How often do you visit this station for the purchase of groceries?

Showcard s5

- Every day..... ☐
- 4 - 5 times a week ☐
- 2 - 3 times a week ☐
- Once a week ☐
- 2 - 3 times a month ☐
- Once a month ☐
- Once every 2 months ☐
- 3 - 4 times a year ☐
- Once a year ☐
- Less often ☐
- First visit ☐

Q7 Generally speaking, do you treat this premises as your principal source for:

Showcard s6a & s6b

Interviewer - Read out full statement above for both petrol and groceries

	Yes	No
Purchasing Petrol or DERV (fuel)	<input type="checkbox"/>	<input type="checkbox"/>
Purchasing Groceries	<input type="checkbox"/>	<input type="checkbox"/>

Q8 Would you consider yourself materially disadvantaged or inconvenienced were this premises to be unable to provide you with:

Showcard s7

	Yes	No
Petrol or DERV (fuel)	<input type="checkbox"/>	<input type="checkbox"/>
Would you have an alternative fuel source you could use?	<input type="checkbox"/>	<input type="checkbox"/>
Is this alternative fuel source available to you without causing you to be disadvantaged or inconvenienced in any way?	<input type="checkbox"/>	<input type="checkbox"/>
If no: Why is this? (probe fully)	<hr/>	
	<hr/>	

Appendix 2 – Research Questionnaire

(Continued)

Q9 Would you consider yourself materially disadvantaged or inconvenienced were this premises to be unable to provide you with:
Showcard s7b

	Yes	No
Groceries	<input type="checkbox"/>	<input type="checkbox"/>
Would you have an alternative grocery source you could use?	<input type="checkbox"/>	<input type="checkbox"/>
Is this alternative grocery source available to you without causing you to be disadvantaged or inconvenienced in any way?	<input type="checkbox"/>	<input type="checkbox"/>

If no: Why is this? (probe fully)

Q10 Record Gender

Male..... ☐

Female ☐

Q11 Which of these age groups do you fall into?

Showcard s8

18-24 ☐

25-34 ☐

35-44 ☐

45-54 ☐

55-64 ☐

65+ ☐

Interviewer Say: Could you please tell me your home postcode, this is so we can get a better understanding of store catchment. This data will never be used for contacting you and will never be passed on with any personal information.

Interviewer please enter with a space, as follows.... e.g. G2 4EZ

Postcode

Appendix 3 – Open Ended Responses

Participants who confirmed they were materially disadvantaged or inconvenienced after having considered the alternatives were asked to explain their answer below.

"Q8b"

"If yes: Why is this? (Probe fully)"

"Closest station"

"Have to go further"

"Company is next door"

"Inconvenience"

"Go further for fuel"

"Have to go further"

"Usually last minute for fuel, other stations are further away"

"Because it's nearest one"

"Not as handy"

"Have to travel further"

"Fills up cars for euro car and its close"

"Handy for a taxi driver going to the airport"

"It's cheaper fuel than ones nearby"

"Travel further to get fuel"

"Q8e"

"If no: Why is this? (Probe fully)"

"Would cost more to get fuel"

"Further away"

"Have to go further for fuel when working, would be an extra cost"

"Q9b"

"If yes: Why is this? (Probe fully)"

"Buy coffee here"

"Nothing close to hotel and stay 3days a week"

"Like a snack at any time"

"Taxi driver - source for coffee, snacks. Toilet facilities"

"Work around"

"Few places locally to go"

"Q9e"

"If no: Why is this? (Probe fully)"

"Have to go further for a late snack"