

Shell Cocket Hat South Filling Station

North Anderson Drive

Aberdeen, AB15 5DB

Customer Profiling Research Report

April 2018

Research & Reporting by

Taylor McKenzie Research & Marketing Ltd (TMcK)

TMcK



Executive Summary Page Cocket Hat Filling Station

Introduction

The following report outlines the findings from a customer research interviewing program carried out between Monday 26th March and Tuesday 10th April at Cocket Hat Filling Station, North Anderson Drive Aberdeen, AB15 5DB. 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?

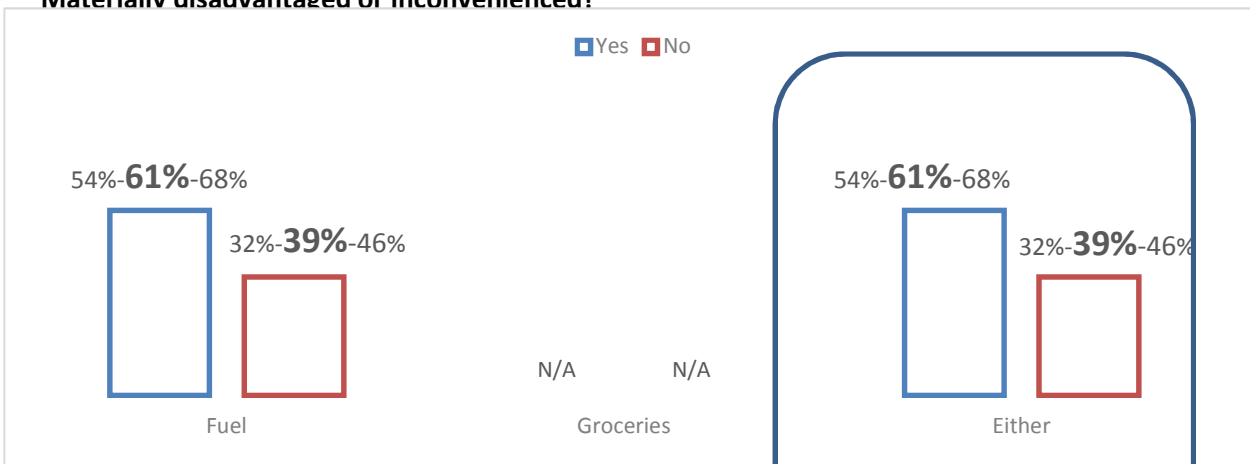


Figure 9 – Fuel Base 172

Groceries Base 0

Either Base 172

Conclusion

The results show that a statistically significant* proportion of persons (61% (+/-7.4%) in the locality) see and treat this service station on North Anderson Drive 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.

Contents Page

Executive Summary Page.....	1
Introduction.....	2
Key Research Objective	2
Conclusion	2
Contents Page.....	3
Research Methodology	4
Sample Size.....	4
Population of Interest.....	4
Defining the Population of interest.....	4
Research Findings – Locality	5
Locality to Premises.....	5
Research Findings–Geo-mapping	6
Research Findings –Demographics	7
Research Findings – Premises Usage	8
Research Findings – Key Findings	9-12
About TM^{CK}.....	13
About Market Research Society (MRS)	13
Appendix 1 – Research Background	14
Appendix 1 – Research Background (continued).....	15
Statistical Representation.....	15
Appendix 2 – Research Questionnaire.....	16
Appendix 2 – Research Questionnaire (Continued).....	17
Appendix 2 – Research Questionnaire (Continued).....	18
Appendix 3 – Open Ended Responses	19

Research Methodology

Cocket Hat Filling Station

A quantitative research study was carried out at Cocket Hat Filling Station, North Anderson Drive Aberdeen, AB15 5DB between Monday 26th March and Tuesday 10th April 2018 with 726 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 726 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 – 172]. This figure represents 24% of the entire customer population.**

Population of Interest

This sub-group of 172 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 1.5 miles = continue

1.5 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 Cocket Hat Filling Station

Locality to Premises

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

If codes 1-4 were selected (under 1.5 miles) then respondent was categorised as **living within the locality**.

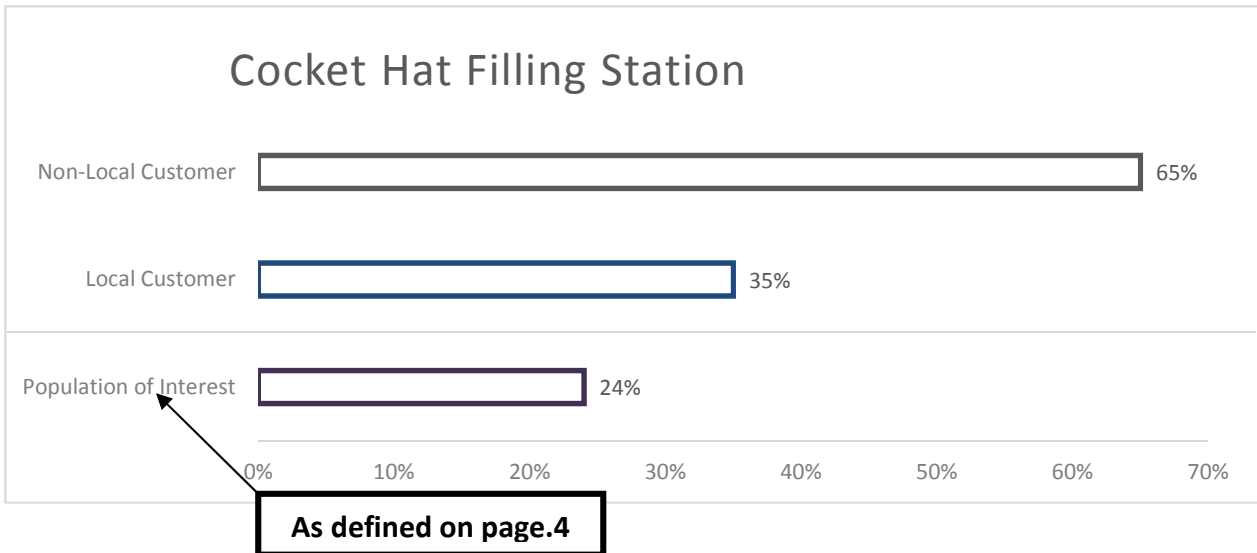


Figure 2 – Base - 726

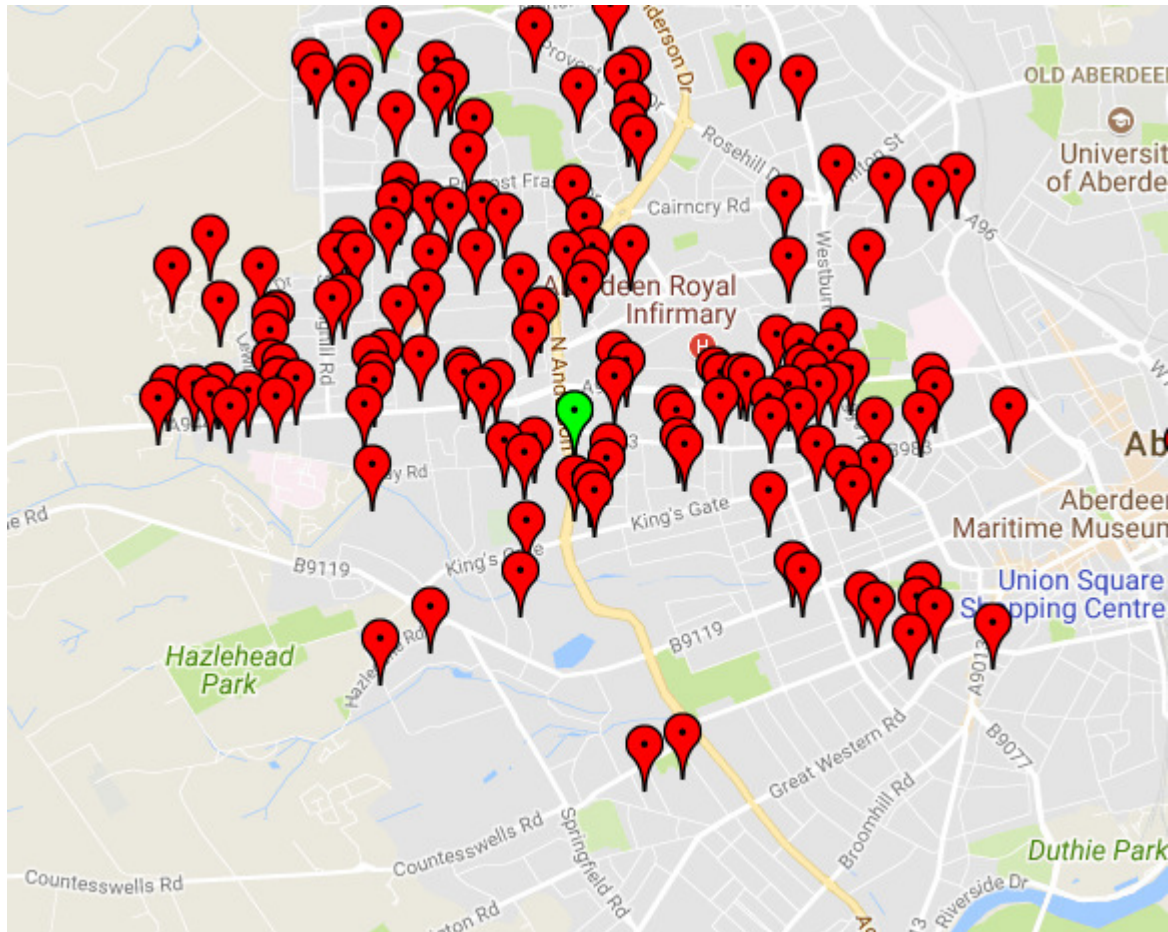
Research Findings–Geo-mapping

Cocket Hat Filling

Station

All participants were asked to provide their postcode in order to allow for them to be geo-tagged on a map. Out of the 172 participants who fell into **the population of interest** 158 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 filling station – 0.81 miles



Map 2

Analysis of the postcode data has shown that the participants from the 'population of interest' live within a locality of 0.81 miles from the service station on average.

Research Findings – Demographics Cocket Hat Filling Station

Station

Gender

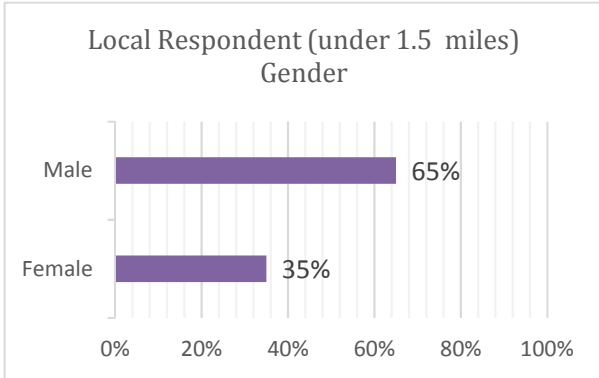


Figure 3 – Base 255

Average visits per week (local users)

Grocery Shopping Base -58	1.46 visits per week
Fuel Purchase Base -249	1.04 visits per week

Table 1 – Base varied

Age

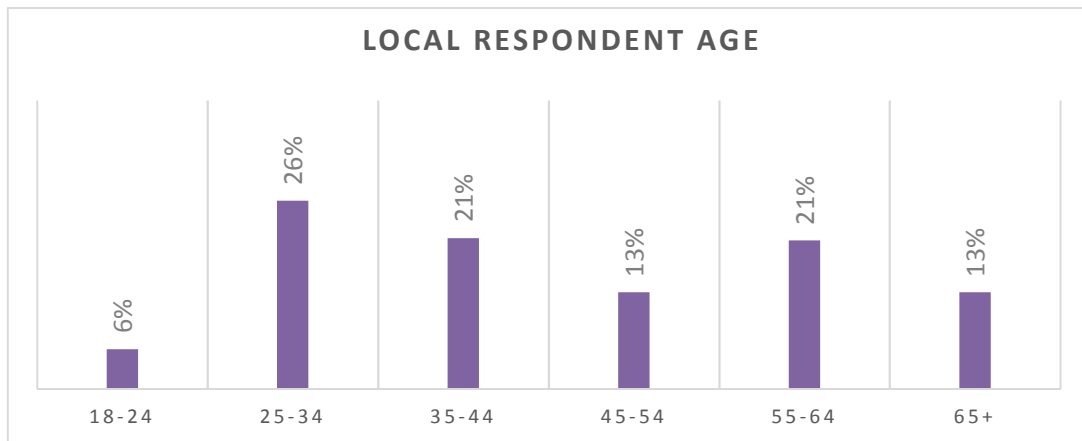


Figure 4 – Base 255

Respondent travel habits

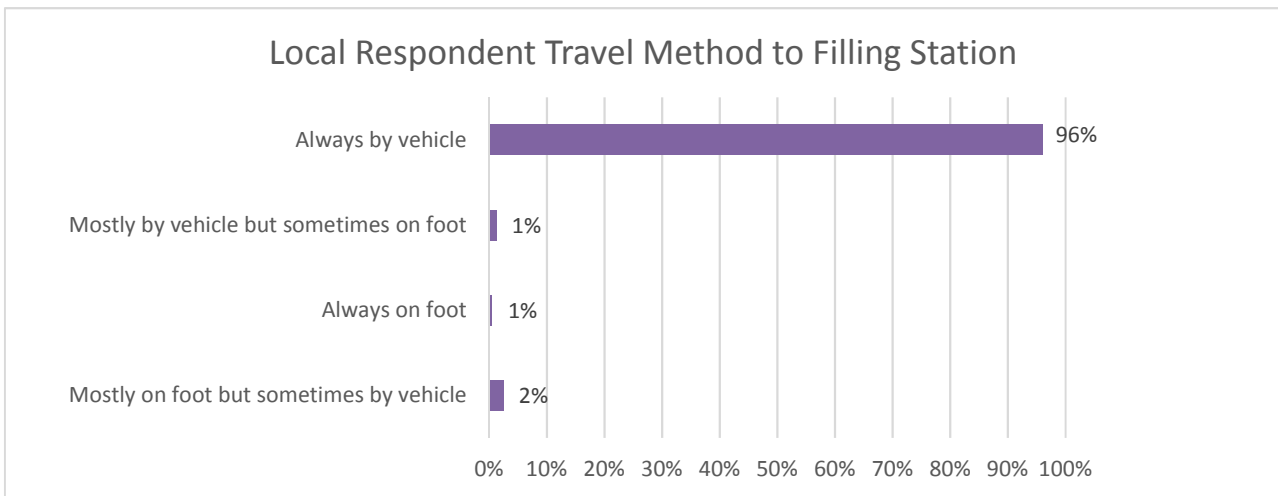
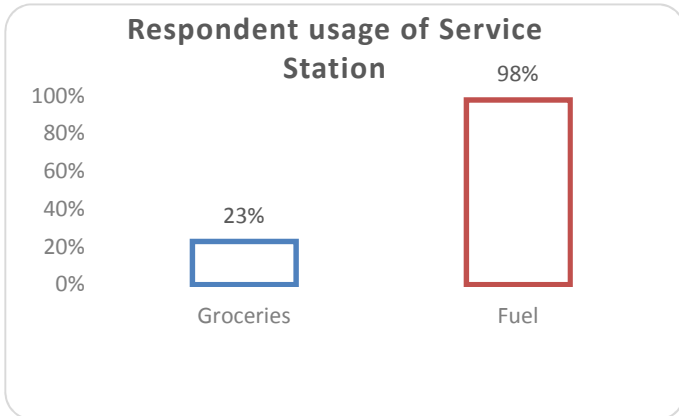


Figure 5 – Base 255

Research Findings – Premises Usage Cocket Hat

Filling Station

How Cocket Hat filling station is being used



58 participants (23%)

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

249 participants (98%)

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

Figure 6 – Base 255

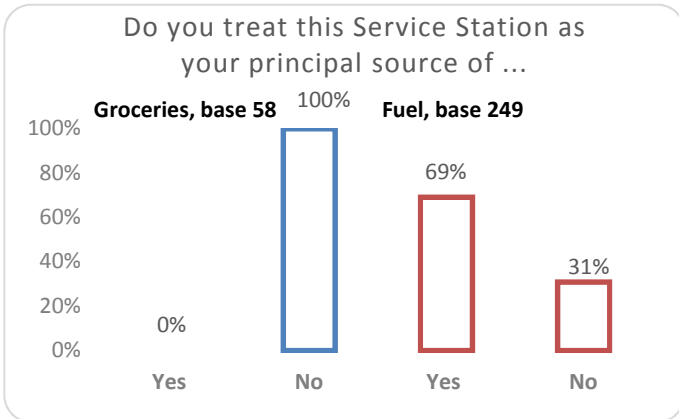


Figure 7 – Base Varied

Defining the population of interest

Participants, who live within the locality (within 1.5 miles) of the service station [Base 255], 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**.

172 (67.5%) local customers (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 – **Figure 8**.

Population of interest
172 participants

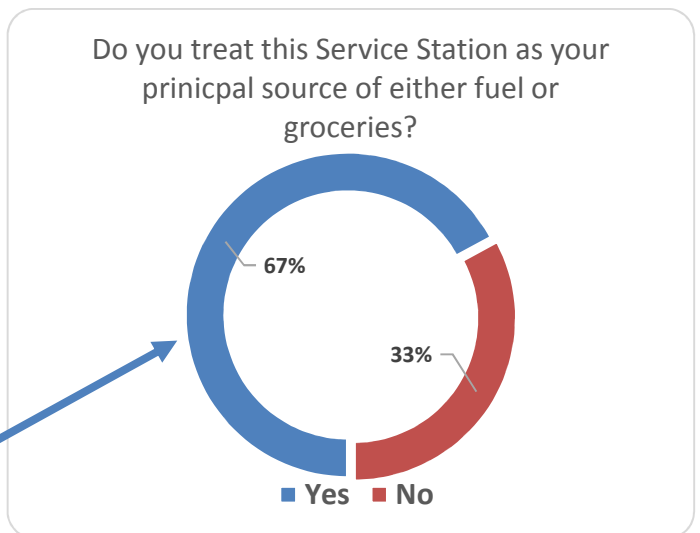


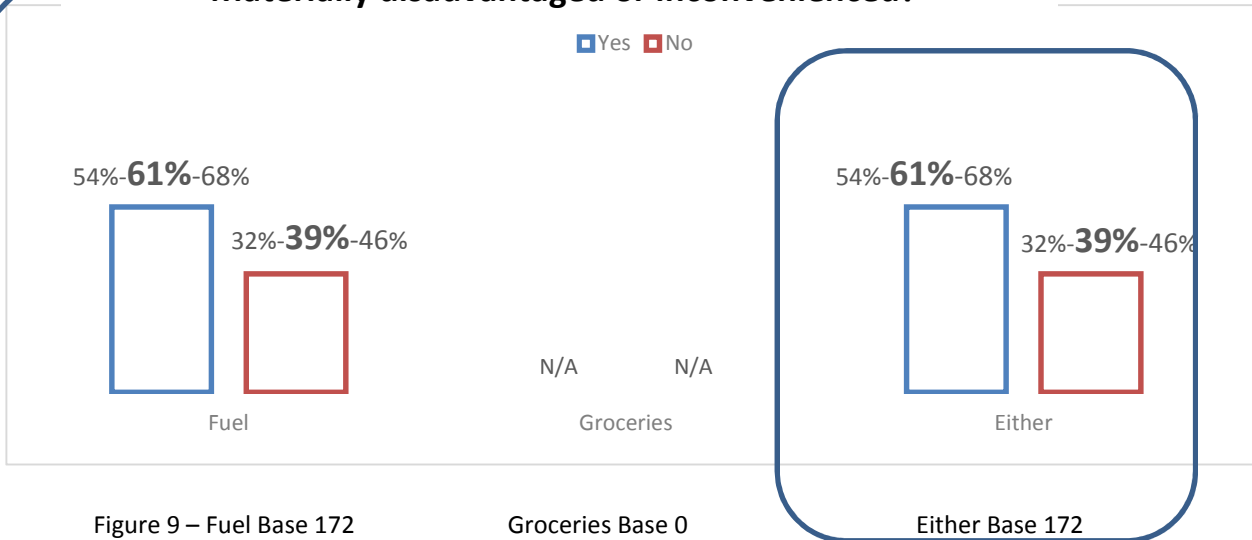
Figure 8 – Base 255

Research Findings – Key Findings Cocket Hat Filling Station

Station

Once the population of interest had been defined (Base 172), 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?



The results show that a statistically significant proportion of persons in the locality (61%) 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 172 participants from the locality stated that they used the station as their principal source of fuel, of these participants 61% (105) stated that they would be materially disadvantaged if the premises could no longer provide them with fuel.

Groceries: We did not speak with any customers who used the station as a principle source of groceries

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

Research Findings – Key Findings

Cocket Hat Filling

Station

In order to qualify the 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 105**

Yes – 69.5% (73)

No – 30.5% (32)

Those who answered 'Yes' to having an alternative fuel source – 69.5% (73) were then asked: **Is this alternative fuel source available to you without causing you to be disadvantaged or inconvenienced in any way? Base 73**

Yes – 8.2% (6)

No – 91.8% (67)

Results show that the alternative fuel sources available to 69.5% of participants would cause 91.8% of this group to be inconvenienced.

94.2% (99) of those materially disadvantaged (base 105) confirmed this was still the case after considering alternatives.

Research Findings – Key Findings Cocket Hat Filling Station

Station

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.

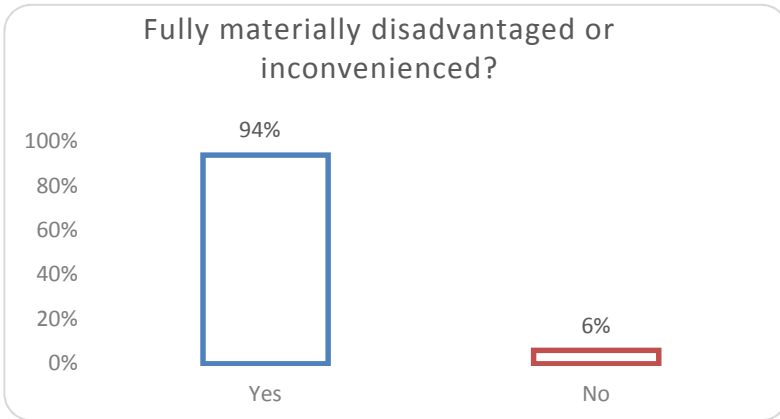
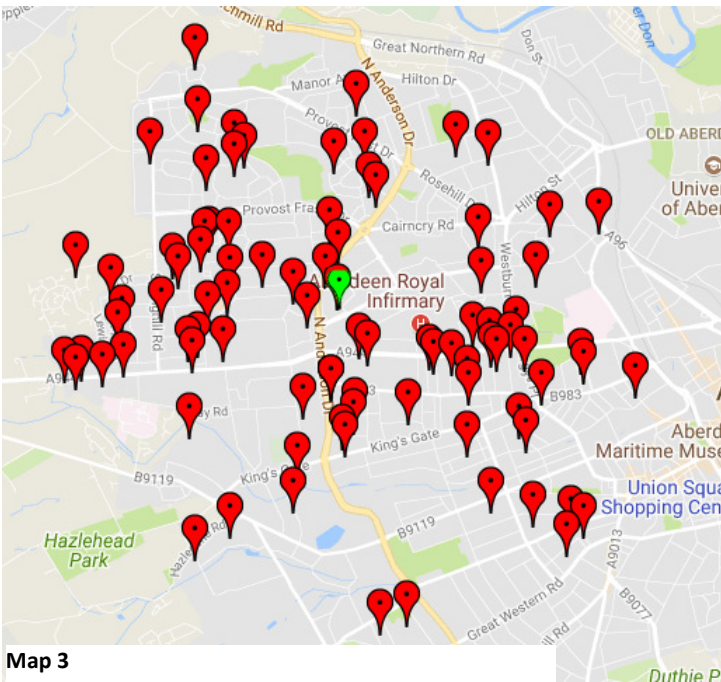


Figure 10, Base 105

The geo-map below shows where all participants (99) who coded 'yes' live; on average 0.83 miles from the station.



Map 3

Research Findings – Key Findings Cocket Hat Filling Station

Station

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

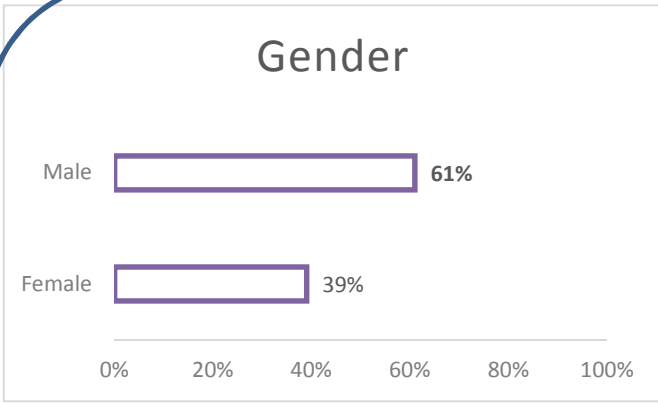


Figure 11 – Base 99

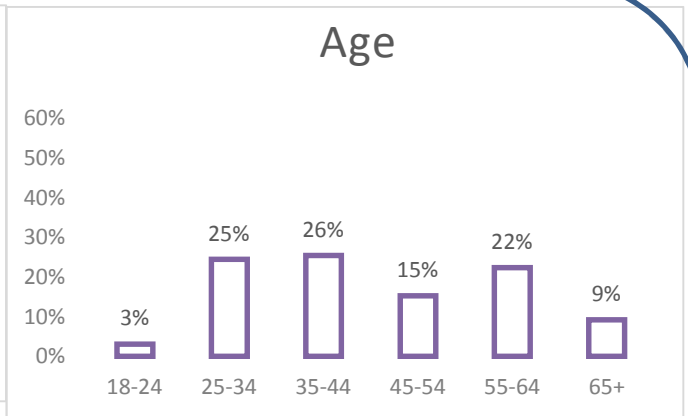


Figure 12 – Base 99

Average visits per week

Grocery Shopping <i>Base 24</i>	1.07 visits per week
Fuel Purchase <i>Base 99</i>	1.4 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 seventeen 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, Tennent's, 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.

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.

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.

<u>Population</u>	<u>%GIVING PARTICULAR ANSWER</u>		
	<u>10%/90%</u>	<u>30%/70%</u>	<u>50%</u>
Total Base 726	+ 2.18	+ 3.33	+ 3.64
Local Base 255	+ 3.68	+ 5.62	+ 6.14
Pop of interest Base 172	+ 4.48	+ 6.85	+ 7.47
Fully Inconvenienced Base 99	+ 5.91	+ 9.03	+ 9.85

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

Cocket Hat Filling Station

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 CLOSE

Within 2 to 10 miles (approx.) CLOSE

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"/>
<i>Would you have an alternative fuel source you could use?</i>	<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)

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"/>
<i>Would you have an alternative grocery source you could use?</i>	<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)"

"Only one on way to work"

"This is close and handy"

"Handy"

"It's so close"

"A trek to others and like the coffee"

"Need to go further"

"Have to go out way"

"Like shell"

"It's on way to work"

"Only use car for leisure and this is on way out of town"

"It's my nearest and stays open convenient hours"

"This is easiest whichever way I'm going"

"Only use v power"

"Been using v power years"

"Us e for taxi and convenience"

"Used to it ideal location"

"Other petrol stations all away"

"It's the one I pass by"

"This is my closest and use shell"

"Handy and has all I need, toilets car wash etc"

"Handy outside house"

"Nearest"

"Don't know where next one is"

"Most convenient and although busy you never have to wait long"

"On the way home from work"

"Most convenient for me"

"Nothing near. No v power"

"Nothing else near here and don't like supermarket fuel"

"I'd have to find another shell"

"It's just round the corner"

"Have to go further"

"This is on main road and can get in from either direction"

"The nearest any good is further on"

"It's closest to home and on way from work"

"Have only got shell card"

"There are hardly any garages near me"

"Only shell around"

"Need to travel further to find shell"

"It's so close"

"There is only another shell at bucksburn"

"Only one other I can use"

"Have to come here for work with card"

"I only use v power"
"Next one westhill"
"Like shell"
"I get on way home"
"It's on my way to work and children's work"
"Need to go further"
"Hardly any in Aberdeen"
"Like shell"
"Not a lot of fuel stations limited"
"Next one miles away further down"
"This is most convenient and in main road don't need to go off road to get here"
"Got a shell card and no other she'll garage near"
"Closest to me and I run on red often"
"It's on way home"
"There are not many more"
"Nearest to house"
"On way to work"
"It's close to me and dk next one"
"Live next to here"
"This is closest"
"Fill up multiple cars for work"
"Need to go further"
"This on route"
"Not sure where next is"
"Can only use shell"
"Collect she'll points not another shell garage near here"
"Need v power fuel"
"Need to go further"
"Have to go morrisons"
"Close and only use shell"
"Nearest would be airport"
"Be problem no others"
"Further to others"
"So handy round corner"
"It's on way work"
"This is good proximity to house"
"Next one too far away"
"Need to go distance"
"Very few left"
"So close to home"
"Right on road"
"Not enough petrol stations here"
"Not so many here now"
"This is close in my area"
"It's a big nuisance when it's closed as need to go two miles or hope can manage till return journey"
"Have to go to site further away"
"Nearest shell"
"We only use shell"
"Have to go further"
"I'm close to here"

"Have to travel to find other"
 "Have to drive further or need to wait on it opening again"
 "Q8e"
 "If no: Why is this? (probe fully)"
 "Further away"
 "Need to go further on"
 "It's on my way places here , dk nearest"
 "Most of others are gone near here, need to travel"
 "Means using more fuel"
 "Wrong direction"
 "It's busier road and harder to drive in and out of"
 "Wouldn't be on way out"
 "Further to go"
 "Not another shell for miles , other fuel not as good"
 "Further to get to"
 "A lot further to go will only use shell"
 "Have to go out way"
 "Need to go much further"
 "Out my way"
 "Need to go away out to altns"
 "Not got fuel I like or facilities"
 "Not as handy"
 "Not on way to work"
 "Out of my way"
 "Out of way"
 "Too far if running out"
 "Need to go further to it"
 "It's awkward to get in and out or need to go out way"
 "Can go if have to but out way"
 "This is nearest if not shopping"
 "Good bit out my way"
 "No local shops in area so use grocery too"
 "It's further away"
 "Other shell a bit away"
 "Closest other isn't shell"
 "to as convenient"
 "Too far out from here"
 "Further away"
 "Other shell far away"
 "Not many and none close"
 "It's out my way to it"
 "They are in busy supermarkets and not on roads we travel"
 "Not one I could get to if on red"
 "to as handy"
 "Further away"
 "Far on"
 "Eyed to go out way to it"
 "Have to cut back"
 "Have to go to dyce"

"Two miles out"
"Out way"
"Might be other way"
"Far to next"
"Not many others in Aberdeen"
"Too far to next shell"
"Further on"
"Need to go out my road"
"Need to go elsewhere dk where shell"
"Too far"
"Need to go bit further out"
"Not handy"
"They are well out for me"
"Others all disappear"
"Need to drive down further"
"Red to drive further"
"Dk where next shell station is"
"Supermarket annoying to fill up"
"Drive further to it"
"Next shell a few miles away"