

Propeller Shell Services,
Inverurie Road, Aberdeen, AB21 9BB
Customer Profiling Research Report
January 2019

Research & Reporting by

Taylor McKenzie Research & Marketing Ltd (TMcK)

TMcK



VAT Registration 774523611

A 107 Douglas Street, Glasgow, G2 4EZ

TAYLOR MCKENZIE RESEARCH & MARKETING LTD

T 0141 221 8030

E info@taylormckenzie.co.uk

Registered in Scotland 210656

W taylormckenzie.co.uk

Executive Summary Page Shell Propeller Filling Station

Introduction

The following report outlines the findings from a customer research interviewing program carried out between Thursday 24th January and Monday 28th January at Propeller Shell Services, Inverurie Road, Aberdeen, AB21 9BB. 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?

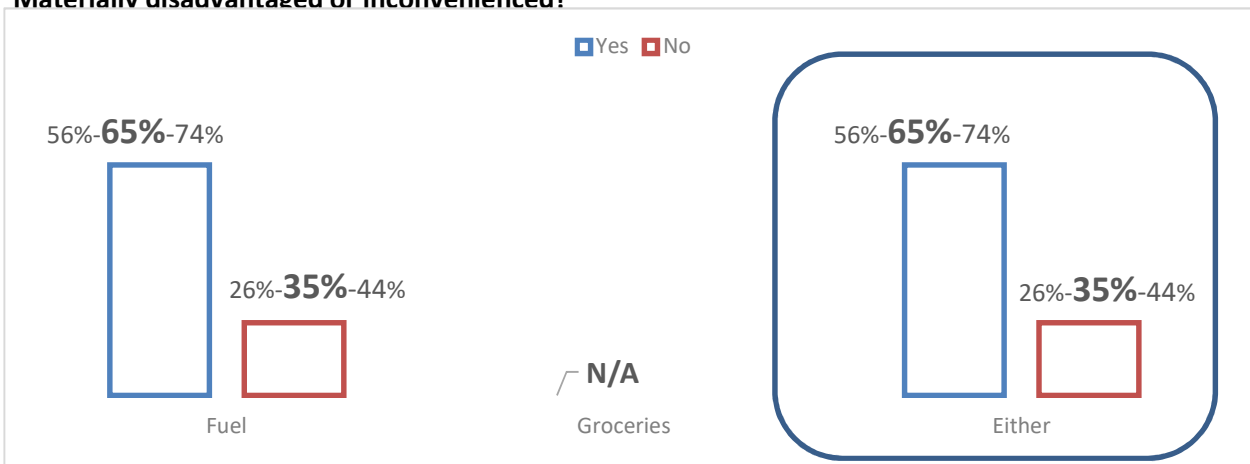


Figure 9 – Fuel Base 110

Groceries Base 0

Either Base 110

Conclusion

The results show that a statistically significant* proportion of persons (65% (+/-9.9) in the locality) see and treat this service station on Inverurie 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

Shell Propeller Filling Station

A quantitative research study was carried out between Thursday 24th January and Monday 28th January at Propeller Shell Services, Inverurie Road, Aberdeen, AB21 9BB with 821 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 821 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 – 110]. This figure represents 13.4% of the entire customer population.**

Population of Interest

This sub-group of 110 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)

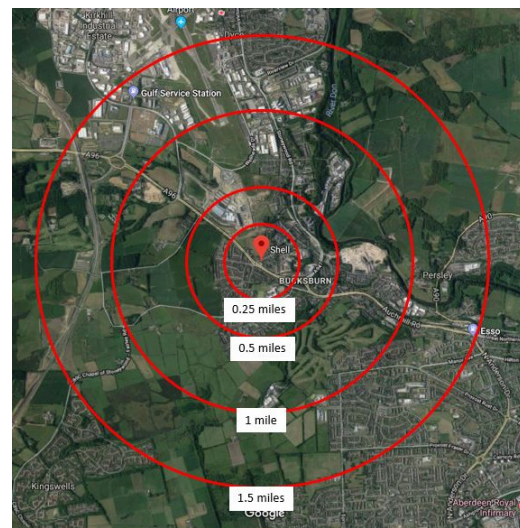
Within 1.5 miles = continue

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 Shell Propeller 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**.

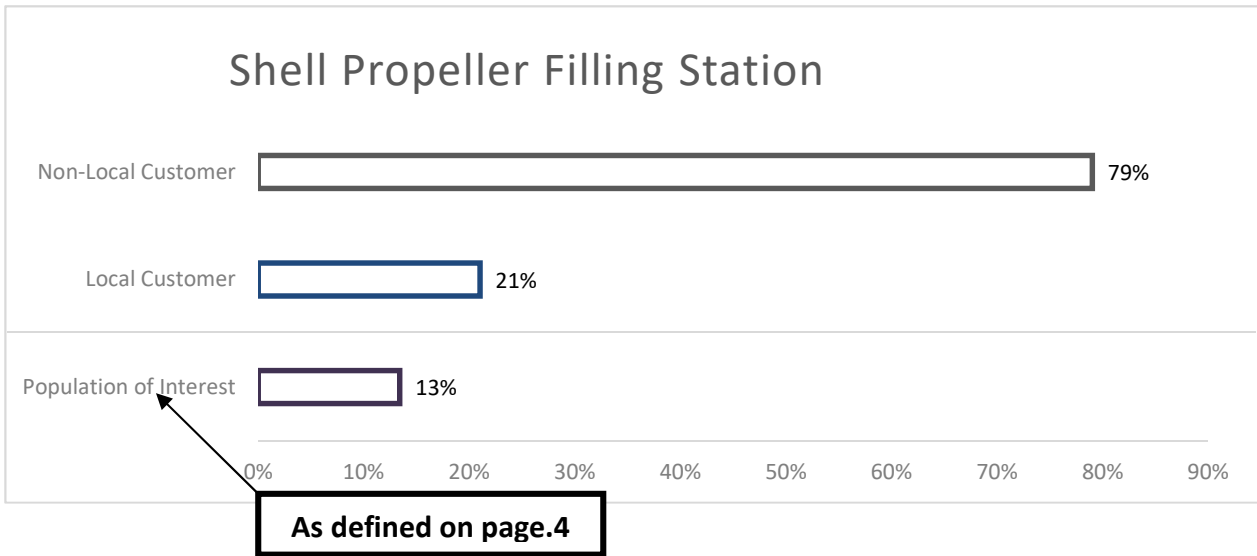


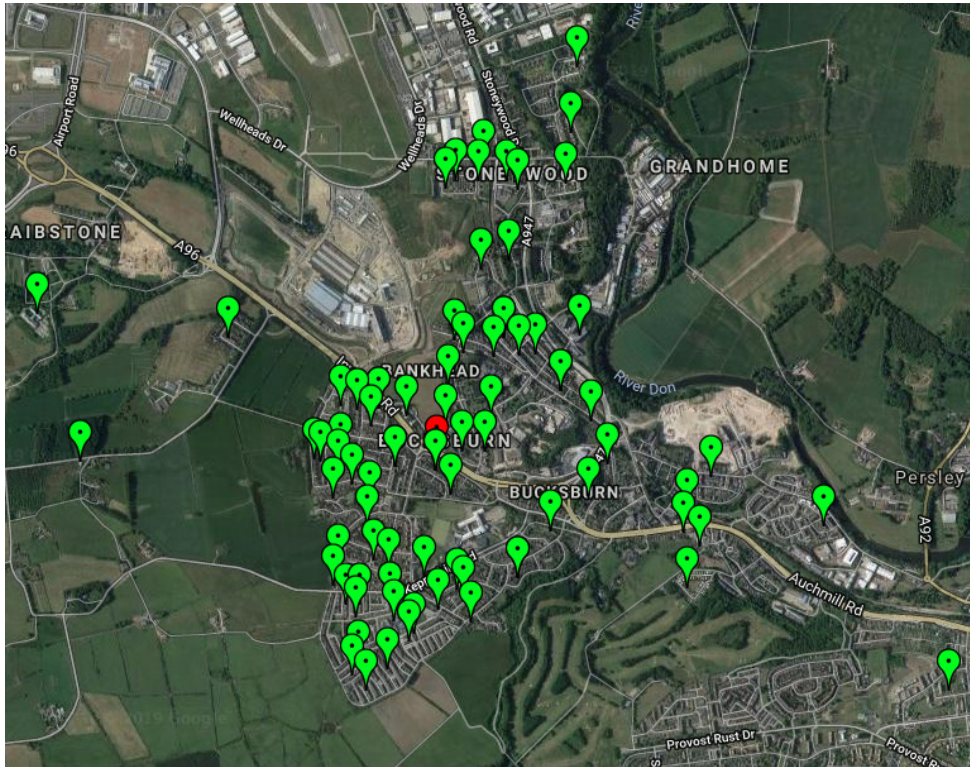
Figure 2 – Base - 821

Research Findings–Geo-mapping

Shell Propeller 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 110 participants who fell into **the population of interest** 110 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 – 0.45 miles



Map 2

Analysis of the postcode data has shown that the participants from the 'population of interest' live within a locality of 0.45 miles from the service station (red icon) on average.

Research Findings – Demographics Shell Propeller

Filling Station

Gender

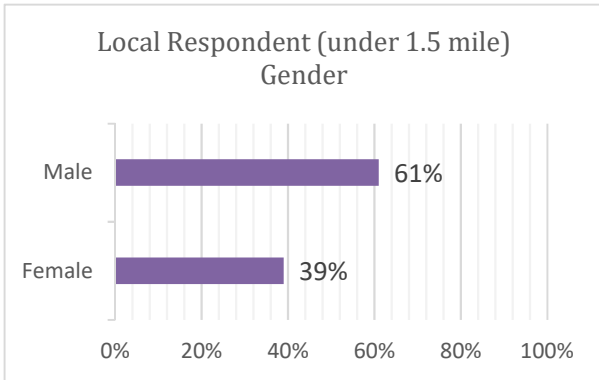


Figure 3 – Base 171

Average visits per week (local users)

Grocery Shopping Base - 48	1.69 visits per week
Fuel Purchase Base - 166	1.29 visits per week

Table 1 – Base varied

Age

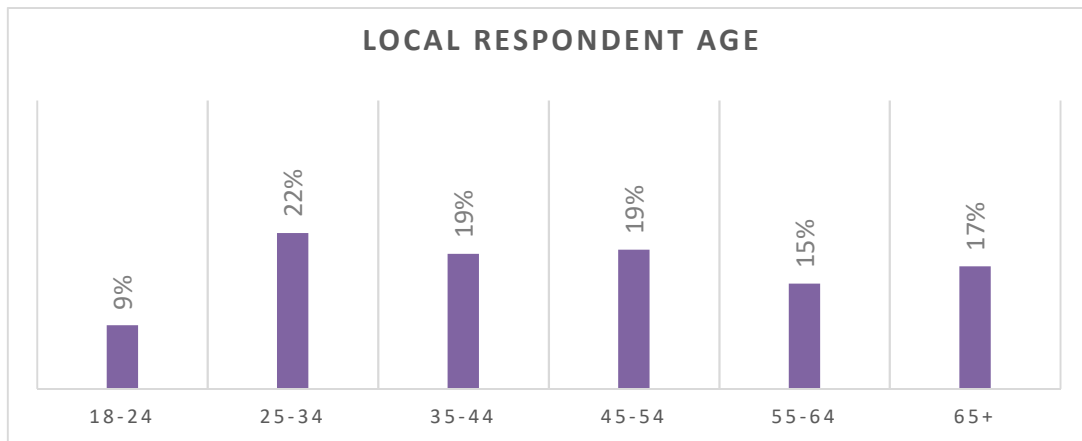


Figure 4 – Base 171

Respondent travel habits

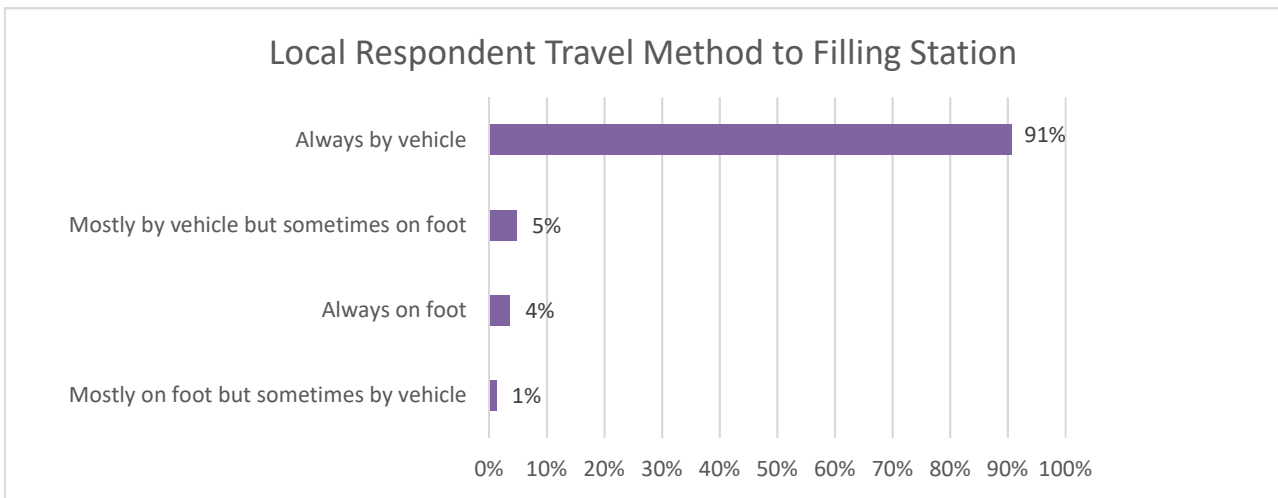
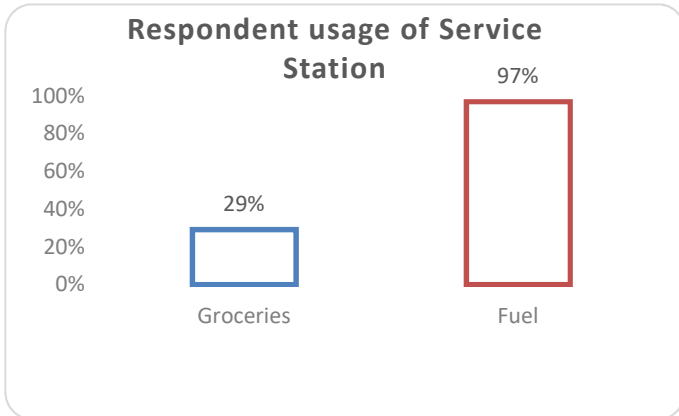


Figure 5 – Base 171

Research Findings – Premises Usage Shell Propeller

Filling Station

How Shell Propeller filling station is being used



50 participants (29.2%)

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

166 participants (97.1%)

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

Figure 6 – Base 171

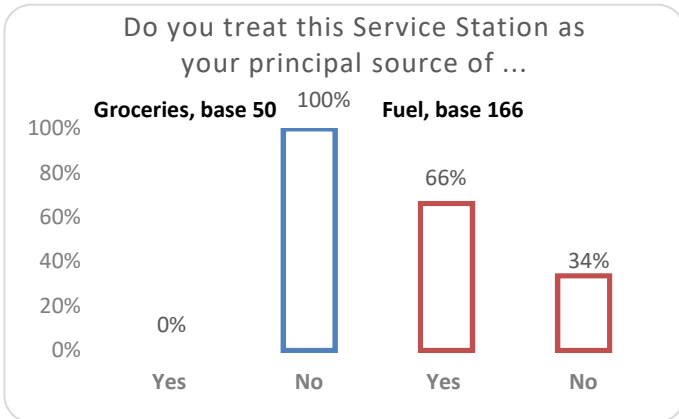


Figure 7 – Base varied

Defining the population of interest

Participants, who live within the locality (within 1.5 miles) of the service station [Base 171], 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**.

110 (64.4%) 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
110 participants

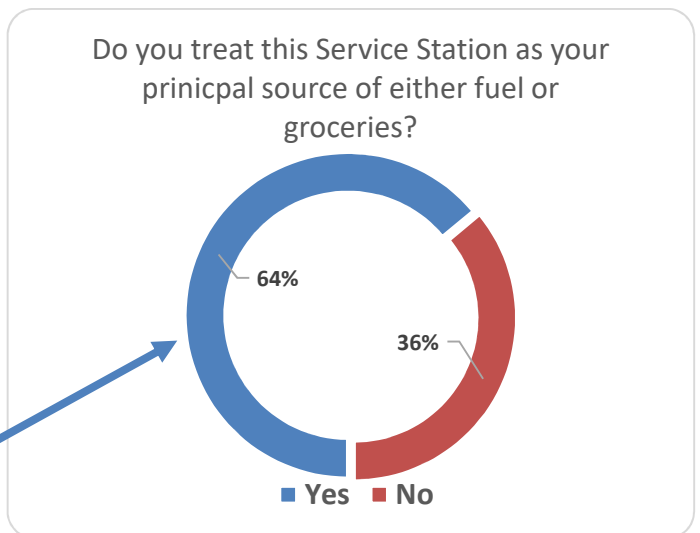


Figure 8 – Base 171

Research Findings – Key Findings Usage Shell

Propeller Filling Station

Once the population of interest had been defined (Base 110), 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?

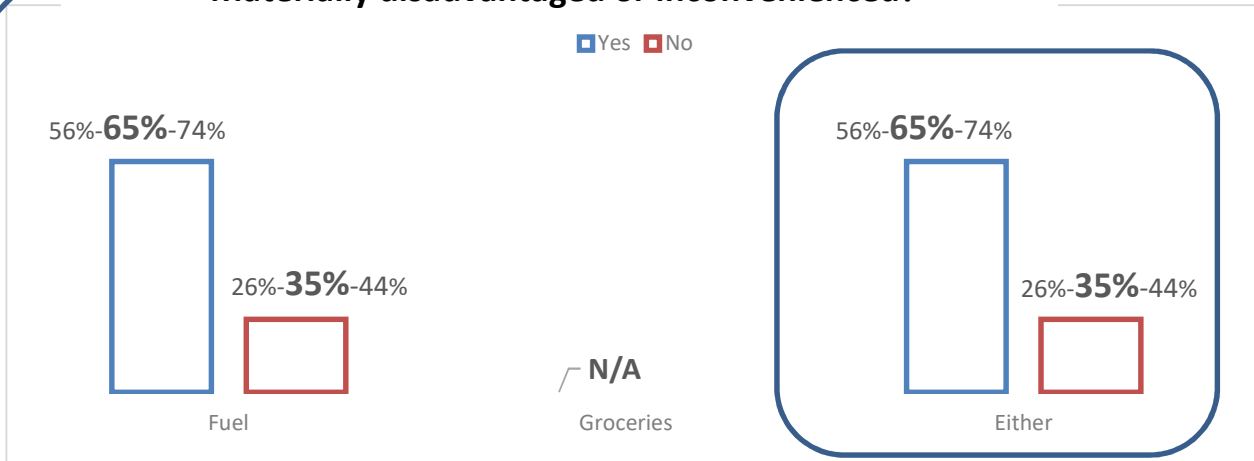


Figure 9 – Fuel Base 110

Groceries Base 0

Either Base 110

The results show that a statistically significant proportion of persons in the locality (64.5%) 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 110 participants from the locality stated that they used the station as their principal source of fuel, of these participants 64.5% (71) stated that they would be materially disadvantaged if the premises could no longer provide them with fuel.

Groceries: No participants used the filling station as their principle source of groceries.

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

Research Findings – Key Findings

Shell Propeller 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 71**

Yes – 76.1% (54)

No 23.9% (17)

Those who answered 'Yes' to having an alternative fuel source – 100% (44) were then asked: **Is this alternative fuel source available to you without causing you to be disadvantaged or inconvenienced in any way? Base 54**

Yes – 7.4% (4)

No – 92.6% (50)

Results show that the alternative fuel sources available to 76% of participants would cause 92.6% of this group to be inconvenienced.

94.3% (67) of those materially disadvantaged (base 71) confirmed this was still the case after considering alternatives.

Research Findings – Key Findings Shell Propeller 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.

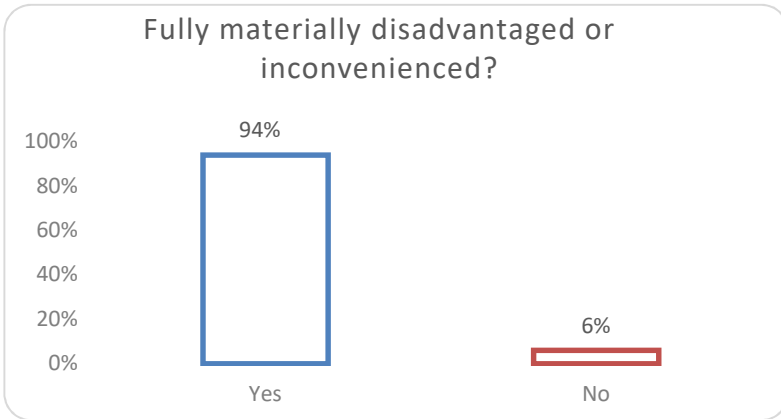
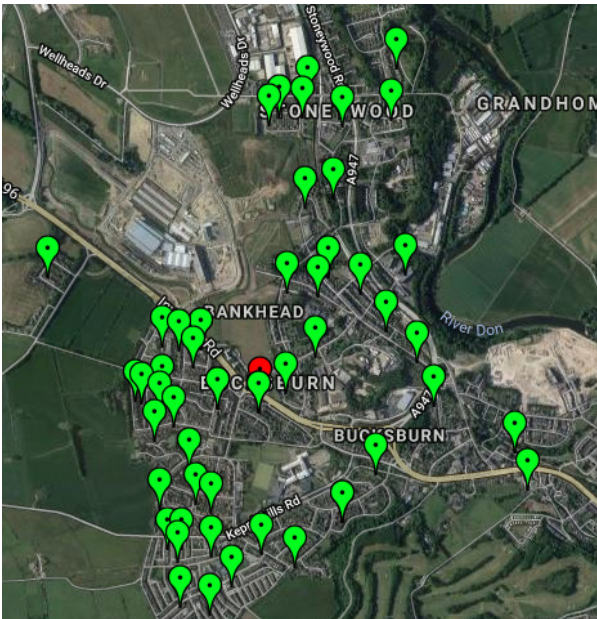


Figure 10, Base 71

The geo-map below shows where all participants (67) who coded 'yes' live; on average 0.39 miles from the station.



Map 3

Research Findings – Key Findings Shell Propeller Filling Station

Station

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

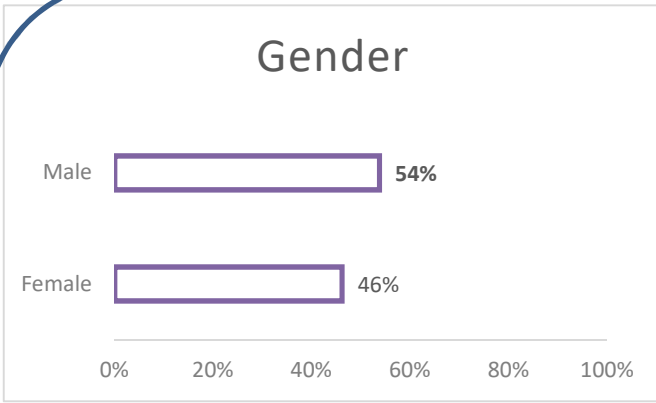


Figure 11 – Base 67

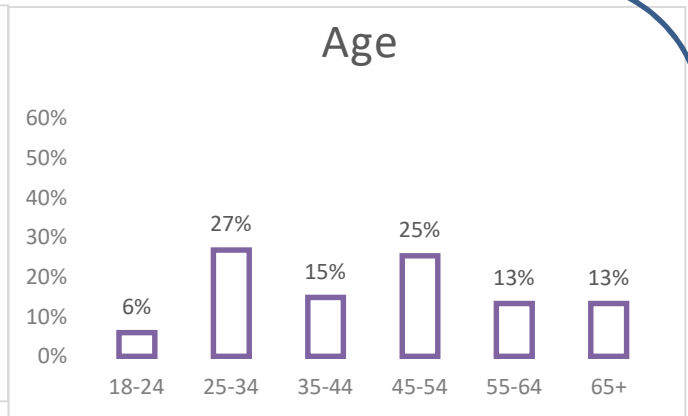


Figure 12 – Base 67

Average visits per week

Grocery Shopping <i>Base 24</i>	2.08 visits per week
Fuel Purchase <i>Base 67</i>	1.71 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 eighteen 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.

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 821	+ 2.05	+ 3.13	+ 3.42
Local Base 171	+ 4.5	+ 6.87	+ 7.49
Pop of interest Base 110	+ 5.61	+ 8.56	+ 9.34
Inconvenienced Base 71	+ 6.98	+ 10.66	+ 11.63

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

Shell Propeller

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"

"Handy close for me"

"Convenient"

"Always convenient for mw"

"Use shell"

"Location and price it's best for shell"

"For close to home"

"Have to drive further"

"Close to home"

"It's so close so handy"

"Handy here"

"Only use shell fuel. Not sure where next nearest is"

"Like shell fuel. Don't think there is another near here."

"Need a high octane fuel and Shell is the best"

"Like her not far from my house"

"Nearest to me"

"Location best for me"

"Shell and next to me"

"So close"

"Location it's close"

"Use shell v power"

"I always use v power"

"Local handy"

"It's closest"

"Location best for me"

"Closest"

"Handy in way home"

"So close"

"This handy"

"Handy and use better high performance fuel"

"Use this brand only"

"Live next door"

"So close on way to town"

"Always like to use shell"

"This close"

"Have to go to Dyce"

"It's location is close for me"

"Use shell fuel"

"Have to go further need to detour"

"Next one miles away"

"Need to go further"

"Location for me"

"Have to go wrong way for work"

"It's shell"

"This is handy need to go further"

"Have to find another"

"Shell card"

"Handy when heading home"

"Need to go further"

"It's very close for me here"

"My car only takes v power"
 "Have to go into town"
 "Handy location"
 "Have to go further"
 "So handy and staff couldn't be more friendly or helpful"
 "No other shell garage near me and don't like supermarket fuel"
 "Sell high octane fuel"
 "Don't like supermarket fuel and that's nearest to me"
 "Like shell fuel and this is on my doorstep. Staff are great to"
 "Would have to go out of my way"
 "Like v power fuel. No other shell garage near here plus collect the points"
 "So near to me and on my doorstep. Prefer shell fuel"
 "Nearest to me and on route to work and on right side of dual carriageway for me. Like shell fuel"
 "Like shell fuel and it's handy for me."
 "Like here and so near home"
 "Like shell fuel"
 "Use V power fuel and only shell sell it"
 "On my doorstep and staff very good."
 "Q8e"
 "Not on way"
 "Further out"
 "Live closer to here"
 "It's out a bit more and not on my route"
 "It's further into town and usually dearer"
 "Further away to others"
 "Out my way"
 "Need to travel to Dyce."
 "Not as near"
 "This is closet"
 "Further to go to get shell"
 "Not near as close"
 "Need to drive to Dyce"
 "Further to drive"
 "It's further to go"
 "Need to go further for v power"
 "Takes me out way"
 "Don't like supermarkets"
 "Sometimes on red and this close"
 "Work and live here"
 "Prefer this shell and service"
 "Not shell"
 "Not as close"
 "Next shell is Anderson drive but bit away"
 "A few miles to next suitable"
 "Need to drive to other area and don't use a lot of fuel this better here"
 "Local not shell"
 "Not as close"
 "Too far away and girls here fill car for me"
 "Need to drive other way from where I drive"
 "3miles away to shell"
 "Off route"
 "Closest shell bridge of don"
 "Always use shell"
 "Next is bit away"
 "Opposite direction for me"
 "This best location"
 "Further away"
 "This handier"

"Next shell a bit away"
"Need to turn off road into other"
"Others out my way"
"Good distance to next shell"
"A distance to it"
"A bit further"
"Off my road"
"It's also off my route"
"Out of my way"
"No other shell garage on my way to work"
"Out of my way so would cost me time and fuel"

Appendix 4 – Postcodes of Population of Interest

Ab21 9ul	Ab21 9ew	Ab21 9ax
Ab21 9dd	Ab21 9fh	AB21 9ED
Ab21 9uu	Ab21 9qs	AB21 9BL
Ab21 9xd	Ab21 9lp	AB21 9XS
Ab21 9jr	Ab21 9jz	AB21 9SL
Ab21 9et	Ab21 9ax	AB21 9DX
Ab21 9ps	Ab21 9je	AB21 9SQ
Ab21 9dd	AB21 9hb	AB21 9QU
Ab21 9ba	Ab21 9rt	AB21 9QD
Ab21 9bd	Ab21 9jp	AB21 9RJ
Ab21 9jb	Ab21 9hr	AB21 9PF
Ab21 9ne	Ab21 9al	AB21 9HR
Ab21 9ax	Ab21 9bl	AB21 9wF
Ab21 9qy	Ab21 9jq	AB21 9HS
AB21 9EA	Ab21 9je	AB21 9SL
AB21 9QS	Ab21 9ld	AB21 9QH
AB16 7UN	Ab21 9be	AB21 9BD
AB16 5ST	Ab21 9wd	AB21 9RU
AB21 9WG	Ab21 9rt	AB21 9AQ
AB21 7FW	Ab21 9de	AB21 9BD
AB21 9XS	Ab21 9ax	AB21 9QH
AB21 9XS	Ab21 9ul	
AB21 9ED	Ab21 9ag	
AB21 9HY	Ab21 9eh	
Ab21 9ey	Ab21 9rj	
Ab21 9jp	Ab21 9fa	
Ab21 9qz	Ab21 9uw	
Ab21 9rt	Ab21 9dr	
Ab16 5az	Ab21 9qa	
Ab21 9qw	Ab21 9lg	
Ab21 9al	Ab21 9ya	
Ab21 9ag	Ab21 9hz	
Ab21 9ha	Ab21 9er	
Ab21 9ul	Ab21 9el	
Ab21 9pp	Ab21 9eh	
Ab21 9ud	Ab21 9ul	
Ab21 9rn	Ab21 9ea	
Ab21 9bl	Ab21 9pp	
Ab21 9xr	Ab21 9bu	
Ab21 9by	Ab21 9de	
Ab21 9eq	Ab21 9py	
Ab21 9up	Ab21 9an	
Ab21 9bd	Ab21 9rl	
Ab21 9jq	Ab21 9pn	