

Redmoss Shell Services,
Wellington Road, Aberdeen,
AB12 3JG
Customer Profiling Research Report
November 2018

Research & Reporting by

Taylor McKenzie Research & Marketing Ltd (TMck)

TM^CK



Executive Summary Page

Shell Redmoss Filling Station

Introduction

The following report outlines the findings from a customer research interviewing program carried out between Tuesday 20th November and Sunday 25th November at Redmoss Shell Services, Wellington Road, Aberdeen, AB12 3JG. 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?

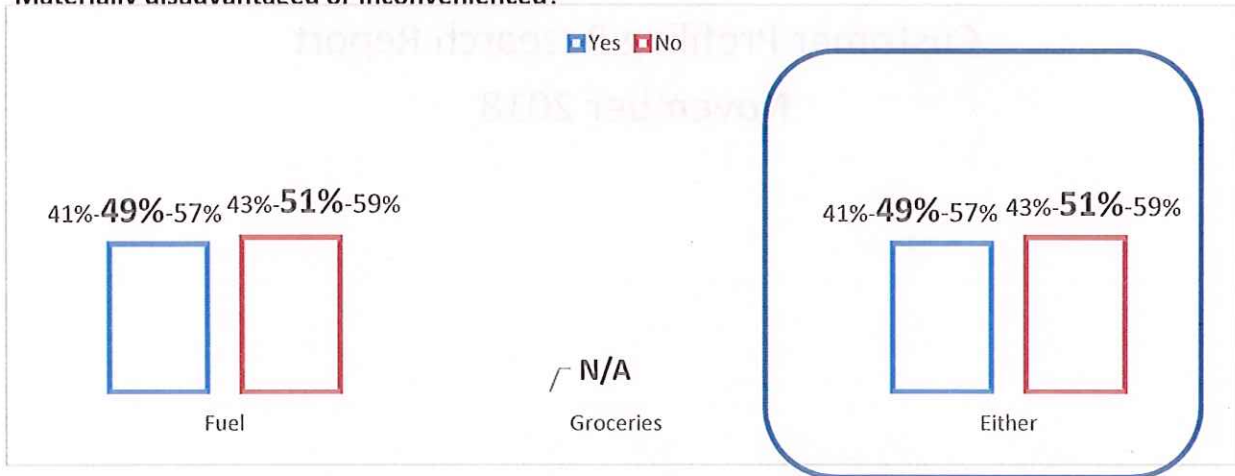


Figure 9 – Fuel Base 139

Groceries Base 0

Either Base 139

Conclusion

The results show that a statistically significant* proportion of persons (49% (+/-8.31%) in the locality) see and treat this service station on Wellington 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 Redmoss Filling Station

A quantitative research study was carried out at Redmoss Shell Services, Wellington Road, Aberdeen, AB12 3JG between Tuesday 20th November and Sunday 25th November 2018 with 648 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 647 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 – 139]. This figure represents 21% of the entire customer population.**

Population of Interest

This sub-group of 139 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)

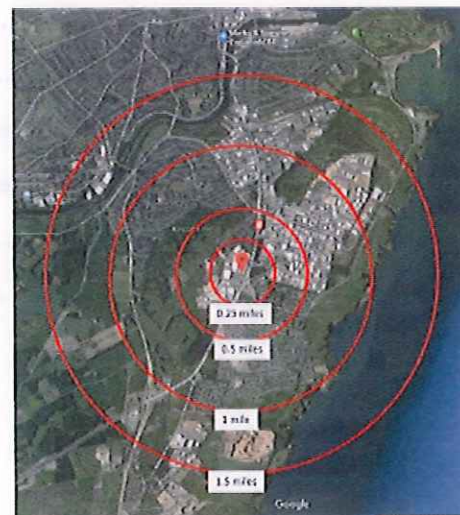
Within 1 mile = continue

1 mile+ = 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 Redmoss Filling Station

Locality to Premises

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

If codes 1-3 were selected (under 1 mile) then respondent was categorised as **living within the locality**.

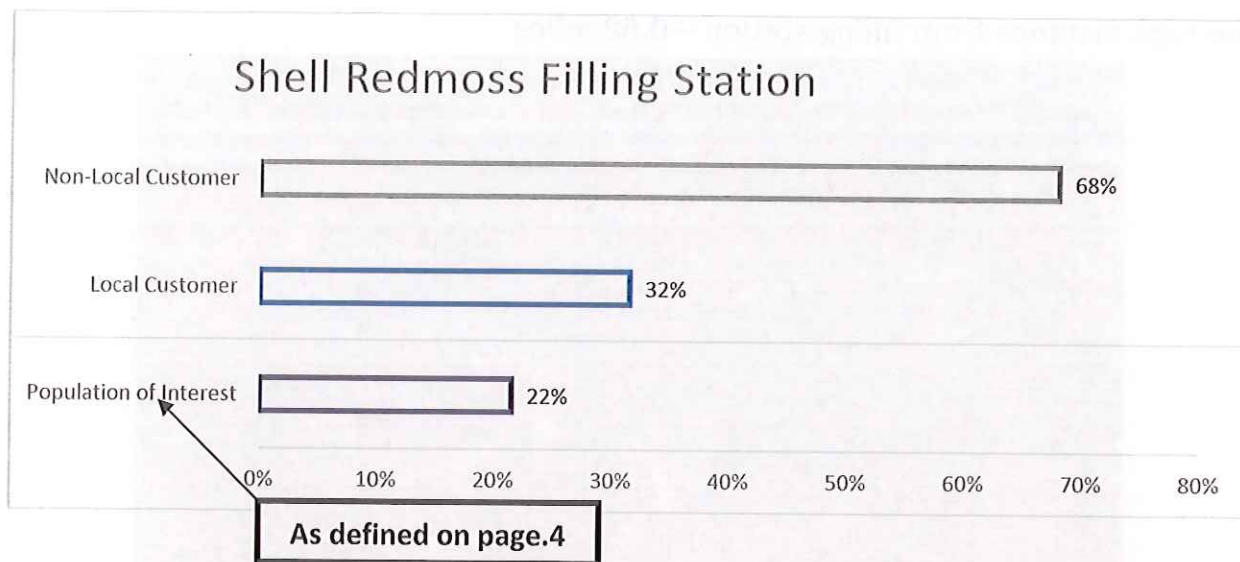


Figure 2 – Base - 648

Research Findings–Geo-mapping

Shell Redmoss 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 139 participants who fell into the population of interest 137 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 – 0.68 miles



Map 2

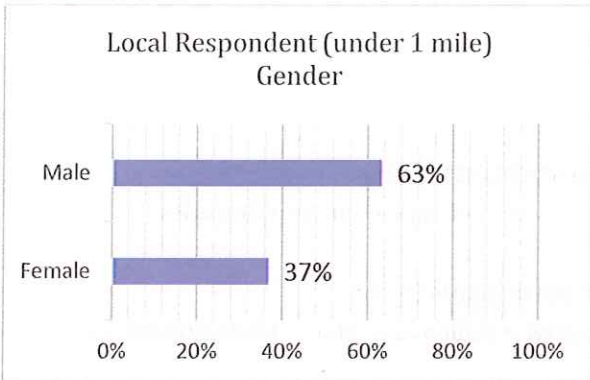
Analysis of the postcode data has shown that the participants from the 'population of interest' live within a locality of 0.68 miles from the service station (red icon) on average.

Research Findings – Demographics Shell Redmoss

Filling Station

Gender

Average visits per week (local users)



Grocery Shopping Base -12	1.17 visits per week
Fuel Purchase Base -198	1.22 visits per week

Table 1 – Base varied

Figure 3 – Base 204

Age

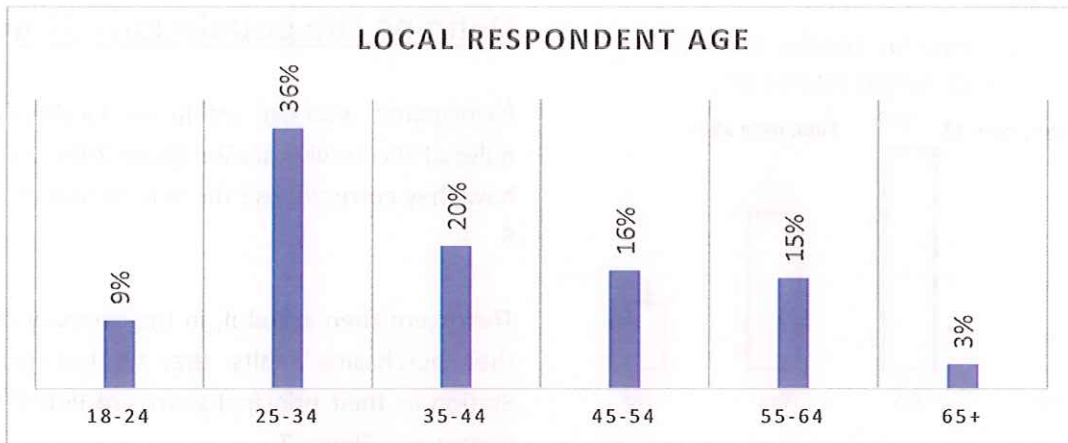


Figure 4 – Base 204

Respondent travel habits

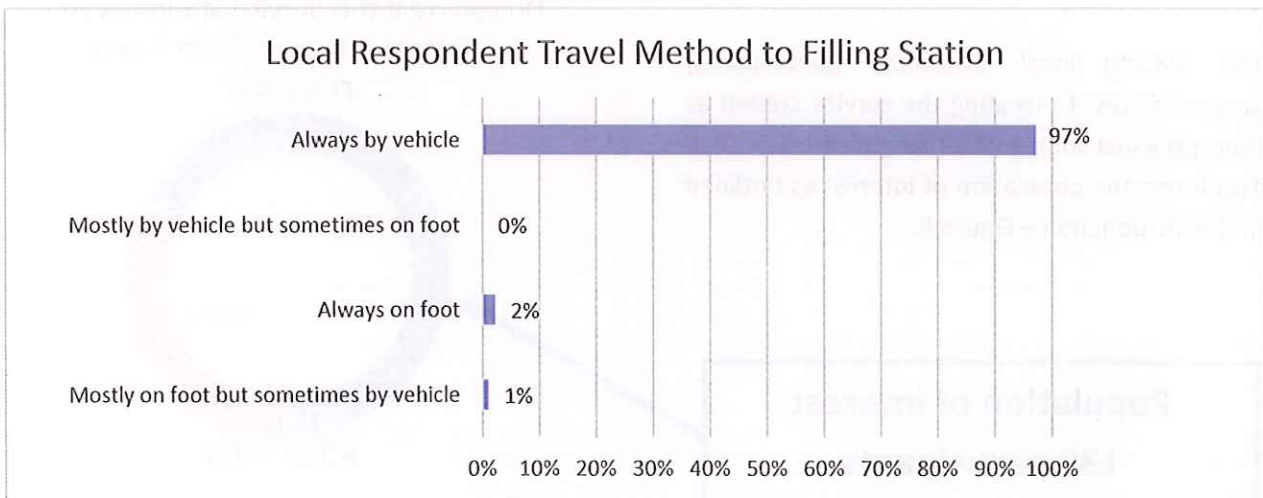
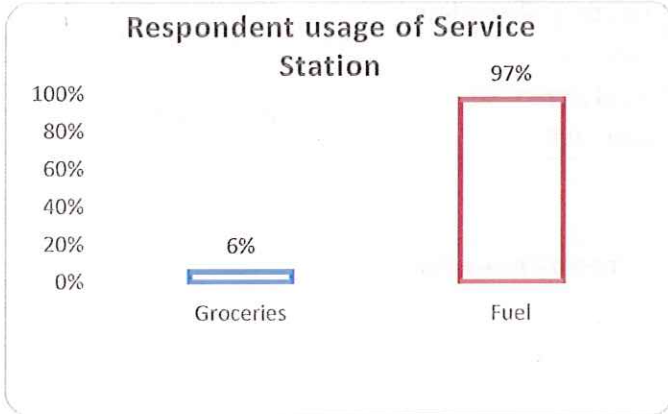


Figure 5 – Base 204

Research Findings – Premises Usage Shell Redmoss

Filling Station

How Shell Redmoss filling station is being used



12 participants (5.6%)

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

198 participants (97%)

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

Figure 6 – Base 204

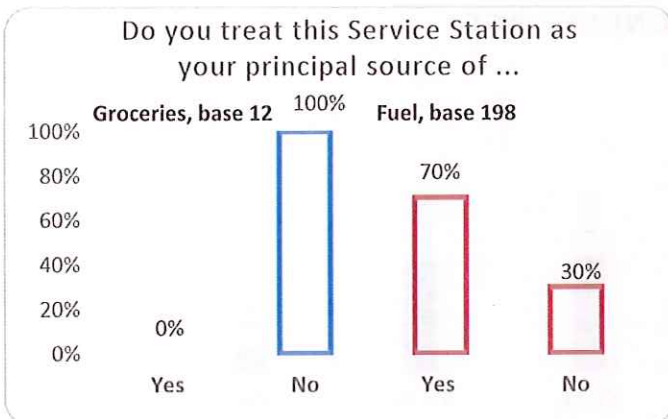


Figure 7 – Base Varied

Defining the population of interest

Participants, who live within the locality (within 1 mile) of the service station [Base 204], 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**.

139 (68.1%) 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
139 participants

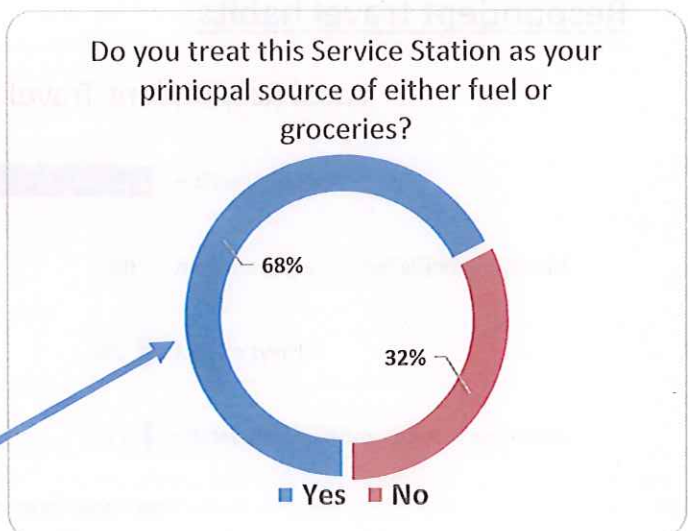


Figure 8 – Base 204

Research Findings – Key Findings Usage Shell

Redmoss Filling Station

Once the population of interest had been defined (Base 139), 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?

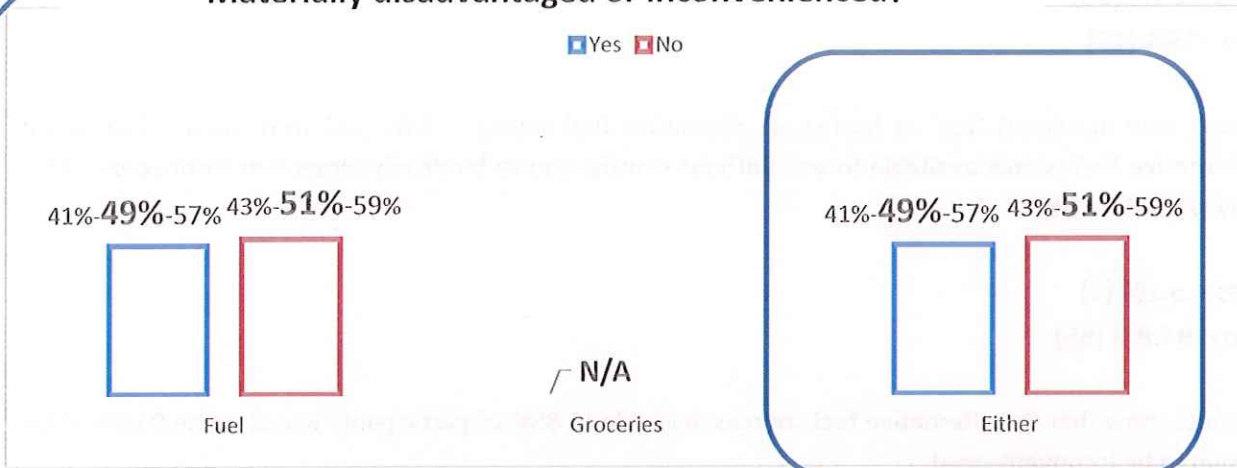


Figure 9 – Fuel Base 139

Groceries Base 0

Either Base 139

The results show that a statistically significant proportion of persons in the locality (49%) 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 139 participants from the locality stated that they used the station as their principal source of fuel, of these participants 49% (68) 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 Redmoss 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 68

Yes – 85% (58)

No –15% (15)

Those who answered 'Yes' to having an alternative fuel source – 74% (43) were then asked: Is this alternative fuel source available to you without causing you to be disadvantaged or inconvenienced in any way? Base 58

Yes – 5.2% (3)

No – 94.8% (55)

Results show that the alternative fuel sources available to 85% of participants would cause 94.8% of this group to be inconvenienced.

95.6% (65) of those materially disadvantaged (base 68) confirmed this was still the case after considering alternatives.

Research Findings – Key Findings

Shell Redmoss Filling 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.

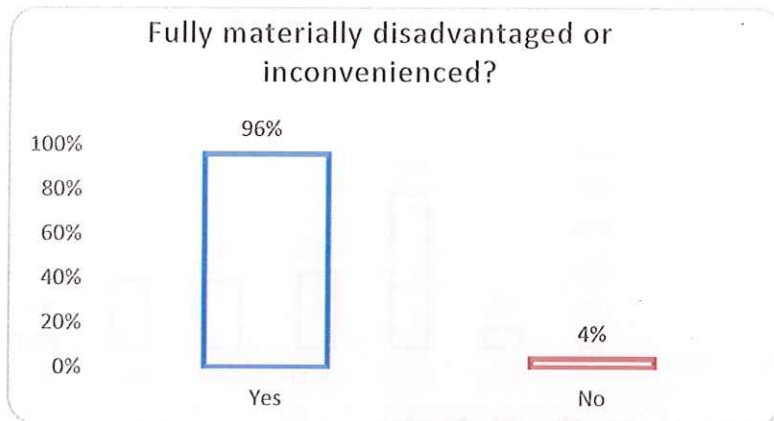


Figure 10, Base 68

The geo-map below shows where all participants (65) who coded 'yes' live; on average 0.69 miles from the station.



Research Findings – Key Findings

Shell Redmoss Filling Station

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

Gender

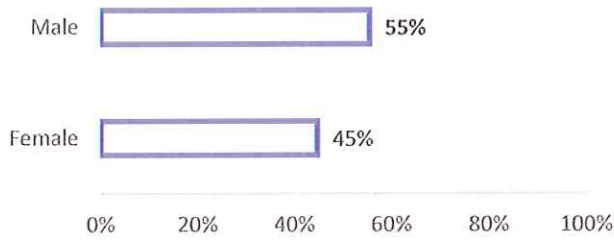


Figure 11 – Base 65

Age

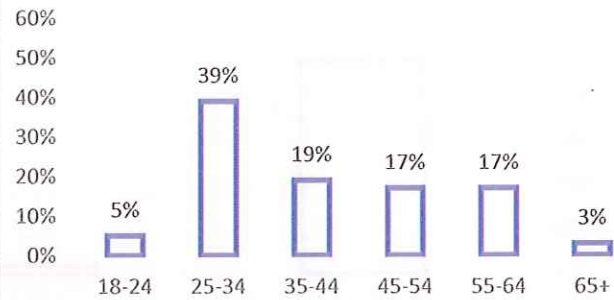


Figure 12 – Base 65

Average visits per week

Grocery Shopping Base 3	1.17 visits per week
Fuel Purchase Base 65	1.63 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.

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 648	+ 2.31	+ 3.53	+ 3.85
Local Base 204	+ 4.12	+ 6.29	+ 6.86
Pop of interest Base 139	+ 4.99	+ 7.62	+ 8.31
Inconvenienced Base 68	+ 7.13	+ 10.89	+ 11.88

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 Redross.....
-
-

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"/>
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)

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)"

"Use shell only"

"I use this and the other shell depending on direction"

"It's my routine"

"It's handy convenient"

"I pass on my own car and I hire a car one day a week and this is on way to return"

"This more on way"

"Nearest use for work driving instructor"

"I've got a fuel card can only use here"

"Use shell fuel cards this one where I start my runs for work"

"Work fuel card"

"Don't use a lot and this local"

"This most convenient"

"Convenient to me"

"Use shell"

"Fuel card is for here"

"Have to go down and turn"

"Easiest to access"

"This close and convenient"

"Have a shell account here"

"We use fuel cards"

"This one is closest Have to travel to other"

"Has to be shell as have fuel card"

"Would need to go down road and turn to other one"

"This more convenient"

"Other out the way"

"It's the closest and handiest for all directions"

"Local"

"Do this on way school"

"I buy v power only one close"

"This is local to home and work"

"Other further down in towards town Handy here"

"It's fine and handy"

"Have to go elsewhere"

"It's closest to me"

"This one has hose for asking car other doesn't have this"

"Need to cross road"

"Can only use shell"

"Have to go further"

"A bit annoyed"

"Closest"

"This easy access"

"Have to drive further out and make a turn to other shell"

"It this side of dual carriageway"
 "This is nearest and easiest and has better facilities"
 "It's the nearest"
 "If coming this direction its closer"
 "Can get coffee and sit in car park when come here eat breakfast"
 "Don't use supermarket fuel"
 "Convenient"
 "Don't want to drive further"
 "Need to go further"
 "Closest"
 "Can only put certain fuel in car so don't mix fuels"
 "Need to travel"
 "This is handy on way to work"
 "It's on straight road from home and nearest"
 "It's really handy"
 "Have to go further shell v power diesel is all I use can't get it elsewhere near to me"
 "This is handy"
 "I'd have to go down and back up to other"
 "Very handy"
 "Inconvenience because others can take 20 minutes with traffic"
 "Handy convenient"
 "This is most convenient"
 "Q8e"
 "If no: Why is this? (probe fully)"
 "It's on way back in from town I normally travel other way so this best and closest and no need to turn"
 "I do use both the shell garages but if this closed and I was heading one way I'd have to backtrack to the other one and vice versa, in fact this is easiest from both sides"
 "This one handy"
 "This handy going certain ways"
 "Need to cut back to other side of road"
 "It's opposite way into town on wrong side of road"
 "This one is always better"
 "This more convenient for house work school etc"
 "Not as handy"
 "Not as handy"
 "Not as convenient"
 "This easier access"
 "More time consuming"
 "I don't pass the other shell station so need to go down turn and come back in a circle on busy road to get to other, none in town when in there"
 "Like getting coffee here"
 "At opposite side road, need to go to roundabout"
 "It's awkward to get across to"
 "This one is better situated for me"
 "It's going down road further then having to turn, busy roads"
 "It's opposite side of road"
 "Takes longer to get down the road"
 "Not as accessible"
 "Not as local"
 "It means going past where I not Really drive to, not as convenient"
 "The other shell is down towards town and need to turn back up this direction so adds Tim and miles for visit"
 "Not as handy"
 "Not as convenient to me"
 "Further away"
 "Doesn't have hose for wash"

"Other one means round the road"
"Further to go"
"Need to go down and backup"
"Opposite side dual carriageway"
"It's down road and on way back to here"
"It's the opposite side of dual carriageway making it a pest to turn, I like this one as fill up on way home so have fuel for next day when it's low"
"It's on wrong side of road for me and doesn't do same things as I get here"
"Not as handy need to go around roundabout"
"Depends on direction I'm travelling"
"Can't sit anywhere near there to finish breakfast"
"Shell across road there but this easier access when heading into town"
"Further to drive"
"Further to go"
"Not as handy"
"Not as easy access"
"Not as close"
"Need to get caught in traffic to turn"
"Off the main road from home"
"Not as handy"
"It's at other direction"
"Not as convenient"
"Not as convenient to get in and out"
"At times too far"
"Not as convenient"
"Not as close"

Appendix 4 – Postcodes of Population of Interest

Ab12 3dw	0.87	Ab12 3bw	0.94
Ab12 3hz	0.8	Ab12 3lx	0.38
Ab12 3ry	1	Ab12 3bu	0.89
Ab12 3na	1	Ab12 3tz	0.48
Ab12 3bw	0.94	Ab12 3pq	0.67
Ab12 3hh	0.6	Ab12 3nj	0.99
Ab12 3qb	0.94	Ab12 3wj	0.36
Ab12 3hw	0.4	Ab12 3up	0.78
Ab12 3bp	0.92	Ab12 3dw	0.87
Ab12 5bd	0.88	Ab12 3bu	0.89
Ab12 3he	0.5	Ab12 3sr	0.67
Ab12 3dy	0.87	Ab12 3jy	0.68
Ab12 3wj	0.36	Ab12 3st	0.4
Ab12 3bp	0.92	Ab12 3jy	0.68
Ab12 5bu	0.77	Ab12 3ef	0.81
Ab12 3bu	0.89	Ab12 3eg	0.85
Ab12 3wn	0.97	Ab12 3qf	0.84
Ab12 3ry	1	Ab12 3pu	0.55
Ab12 3sd	0.38	Ab12 3ub	0.79
Ab12 3lh	0.82	Ab12 3se	0.41
Ab12 3tq	0.37	Ab12 3fq	0.25
Ab12 3bf	0.78	Ab12 3sw	0.4
Ab12 3sh	0.32	Ab12 3hd	0.67
Ab12 3qu	1	Ab12 3qg	0.92
Ab12 3fr	0.18		
Ab12 3nw	0.57		
Ab12 3bu	0.89		
Ab12 3ry	1		
Ab12 3nz	0.8		
Ab12 3tj	0.4		
Ab12 3jn	0.46		
Ab12 3nf	0.55		
Ab12 3bw	0.94		
Ab12 3st	0.4		
Ab12 3sz	0.29		
Ab12 3ub	0.79		
Ab12 3sw	0.4		
Ab12 3dg	0.92		
Ab12 3sz	0.29		
Ab12 3bu	0.89		
Ab12 3fd	0.6		