

Tweedbank Service Station, Tweedbank Industrial Estate,
Tweedbank Drive, Tweedbank TD1 3RS
Future Customer Profiling Research Report
April 2023

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

Registered in Scotland 210656

E info@taylormckenzie.co.uk

W taylormckenzie.co.uk

Executive Summary Page Tweedbank Service Station

Introduction

The following report outlines the findings from a resident research interviewing program carried out between Tuesday 28th March and Wednesday 5th April 2023 at Tweedbank Service Station, Tweedbank Drive, Tweedbank TD1 3RS. The research explored the buying behaviours of persons' resident in the locality of the proposed site. Residents were asked to provide information on; their place of residence in relation to the proposed site, their means of travel to the proposed site, future usage and their purchasing behaviour in relation to fuel and groceries currently.

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 would 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 not be able to provide from said premises.

Materially disadvantaged or inconvenienced?

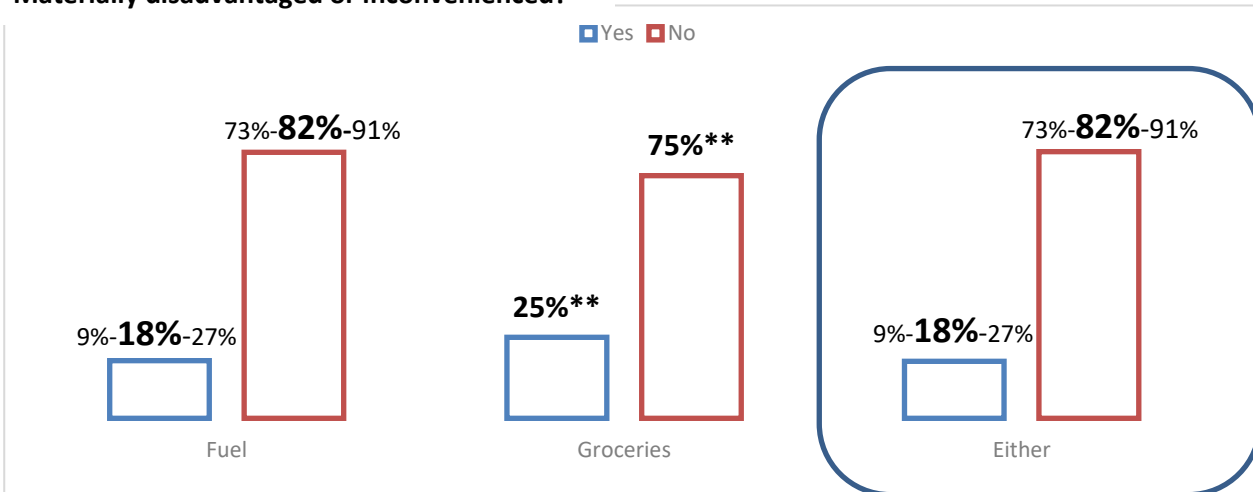


Figure 1 – Fuel Base 73

Groceries Base 4

Either Base 74

Conclusion

The results show that a statistically significant* proportion of persons (18% (+/-9%) in the locality) that would see and treat this service station at Tweedbank as the principal source from which they, in ordinary course, purchase fuel and would properly consider themselves materially disadvantaged or inconvenienced were these retail facilities to not be opened and therefore unable to provide them with fuel. **Grocery base too low to apply confidence intervals.

* 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

Tweedbank Service Station

A quantitative research study was carried out from Tuesday 28th March and Wednesday 5th April 2023 at Tweedbank Service Station, Tweedbank Drive, Tweedbank TD1 3RS with 228 residents who live in the locality (or 'participants'). All of whom were selected for door-to-door survey completion.

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 locally (within 1 mile) via door to door. Participants were selected at random to ensure sampling confidence. By completing 228 interviews with local residents, we can be sure that the data and attitudes collected will be statistically representative of the future 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 would use the garage as their principal source for purchasing Fuel or Groceries [Base – 74]. This figure represents 32.4% of the entire potential customer population.**

Population of Interest

This sub-group of 74 participants will be used to answer the key objective of the research. Whether a recognisable number of persons in the locality would 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 not be opened and therefore unable to provide them.

Defining the Population of interest

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

Within 1 miles = continue

1 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 Tweedbank Service Station

Potential usage of Premises

Q4 – Once this filling station has opened, do you think you would be likely to use this station as a source of... If codes 1-3 were selected they were classed as being open to using the forecourt, if code 4 'Unlikely to use the forecourt' was selected then they were excluded from the remainder of the survey.

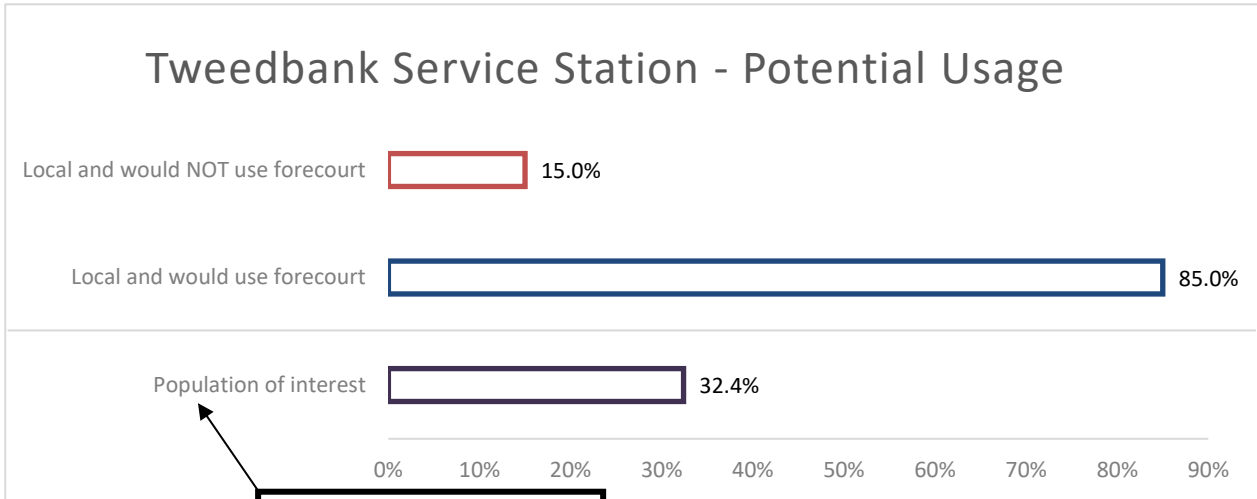


Figure 2 – Base – 228

As defined on page.4

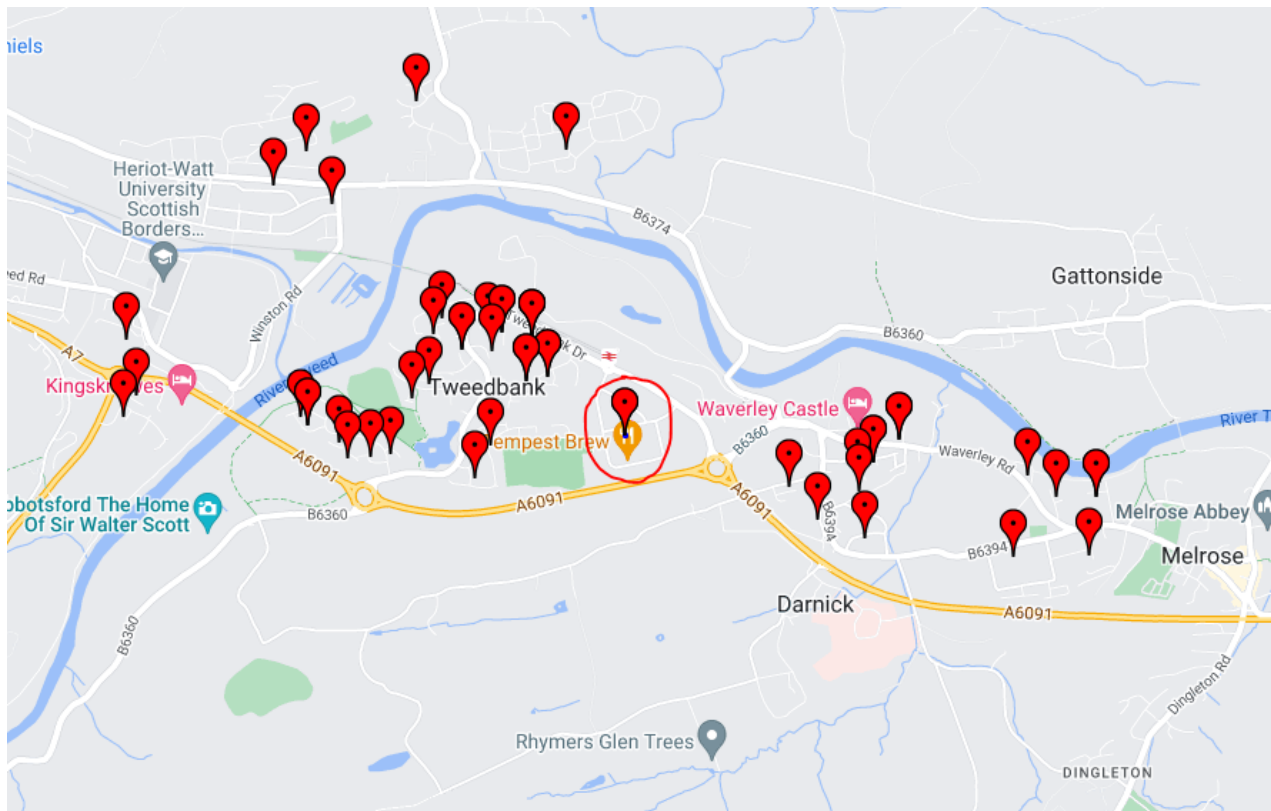
Research Findings–Geo-mapping

Tweedbank Service

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 74 participants who fell into **the population of interest** 74 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 – 0.54 miles



Map 2

Analysis of the postcode data has shown that the participants from the 'population of interest' live within a locality of 0.54 miles from the service station (circled icon) on average.

Research Findings – Demographics Tweedbank Service

Station

Gender

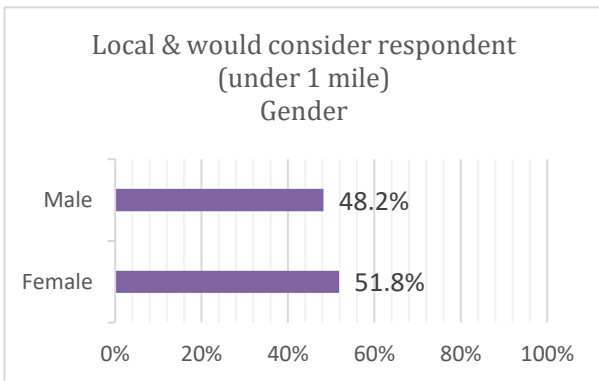


Figure 3 – Base 193

Average potential visits per week (local users & would consider)

Grocery Shopping Base - 103	1.31 visit per week
Fuel Purchase Base - 179	0.84 visits per week

Table 1 – Base varied

Age

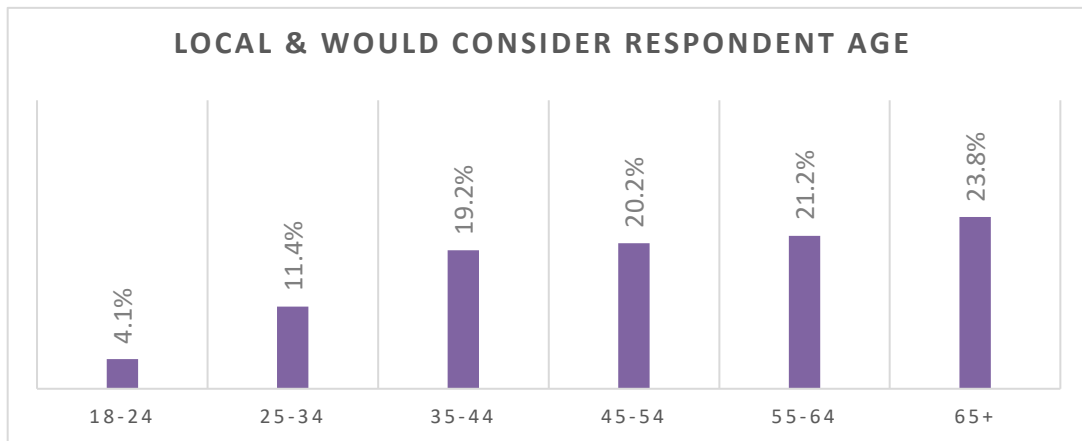


Figure 4 – Base 193

Respondent travel habits

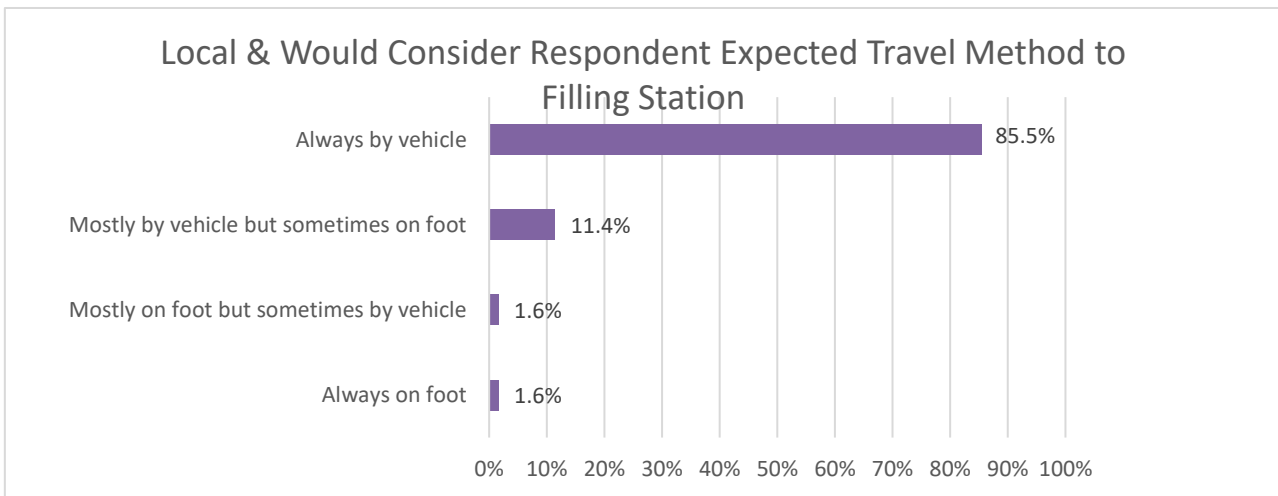
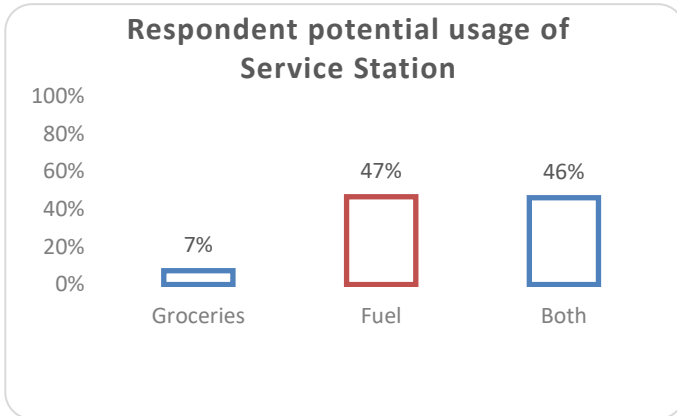


Figure 5 – Base 193

Research Findings – Premises Usage Tweedbank

Service Station

How Tweedbank Service Station would be used



14 participants (7.3%)

Would use service station as a source of **Groceries**.

90 participants (46.6%)

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

89 participants (46.1%)

Would use service station as a source of both – Petrol or DERV & Groceries

Figure 6 – Base 193

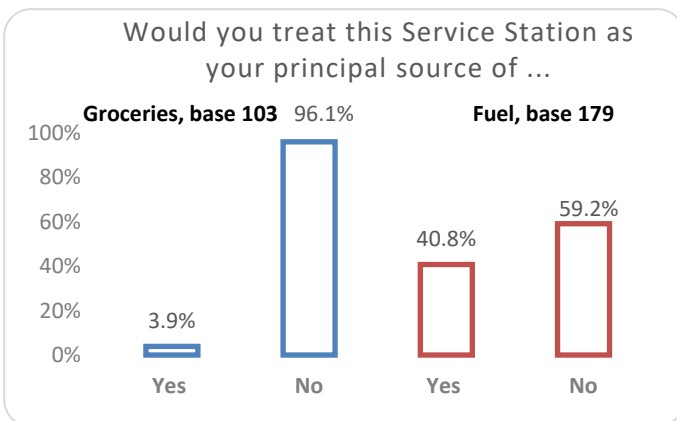


Figure 7 – Base Varied

Defining the population of interest

Participants, who live within the locality (within 1 miles) of the service station [Base 193], were asked how they would potentially use the Service Station – **Figure 6**.

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

74 (38.3%) local customers (participants) answered ‘yes’ to potentially 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
74 participants

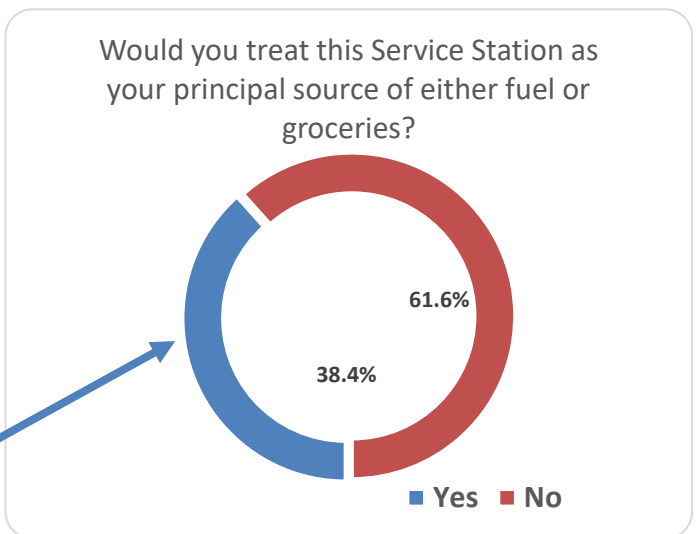


Figure 8 – Base 193

Research Findings – Key Findings Usage

Tweedbank Service Station

Once the population of interest had been defined (Base 74), these participants were asked: Would you consider yourself materially disadvantaged or inconvenienced were this premises not top opened and therefore unable to provide you with: a) Petrol or DERV (Fuel)? b) Groceries?

Materially disadvantaged or inconvenienced?

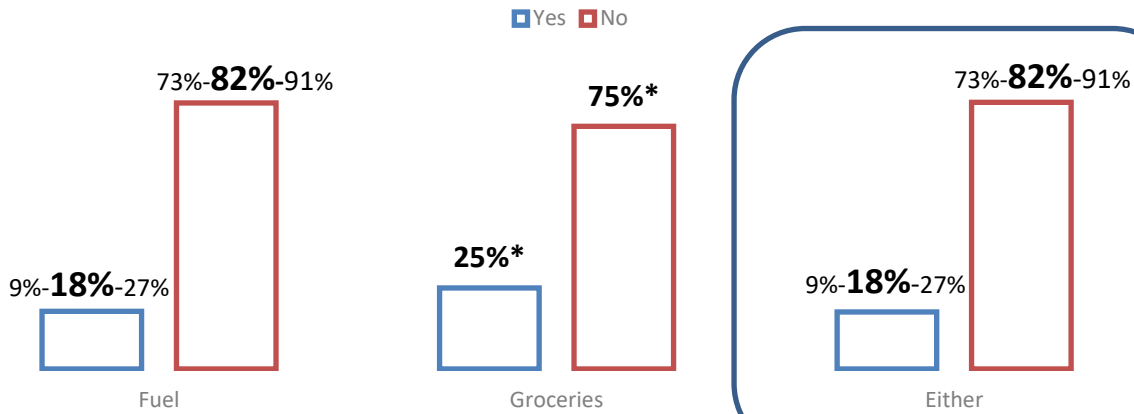


Figure 9 – Fuel Base 73

Groceries Base 4*

Either Base 74

The results show that a statistically significant proportion of persons in the locality (18%) would see and treat the proposed 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 not open and therefore be unable to provide them from said premises.

Bases explained:

Fuel: Overall 73 participants from the locality stated that they would use the station as their principal source of fuel, of these participants 17.8% (13) stated that they would be materially disadvantaged if the premises could not provide them with fuel.

Groceries: Overall 4 participants from the locality stated that they would use the station as their principal source of fuel, of these participants 25% (1) stated that they would be materially disadvantaged if the premises could not provide them with groceries.

**Grocery base too low to apply confidence intervals.*

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

Research Findings – Key Findings

Tweedbank Service

Station

Participants were asked to comment on the opening of the forecourt.

Those who stated they would be materially disadvantaged were asked to explain this in more detail... All suggested that this would offer a much closer alternative compared to current offer.

Nearest is faraway

Nothing nearby

Quite far to go for fuel

The rest are further away

Too far to go for others

I must go further just now

Much nearer in Tweedbank

No other petrol station in Melrose or Tweedbank

It's on my way home from my work

Just because it's nearer ease of access for petrol

Sometimes I am low on petrol and it's inconvenient to go into town

Because no petrol station in my area also for groceries this would be nearer than Gala

Got to go further into Gala

Would be on my way to different places

Driving all the way to Gala for petrol

Participants in the population of interest (base: 74) were then asked if they had any final comments in relation to the proposed forecourt. 37 gave a response.

Positive sentiment: A significant number of respondents (28 out of 37) expressed positive feelings towards the petrol station, mentioning aspects such as increased convenience, more choice, and potential competitive pricing. They also mentioned looking forward to the opening and potential job opportunities.

Neutral sentiment: Some respondents (7 out of 37) mentioned that their support depends on factors like cost, the range of food offerings, and the management of the petrol station. These respondents did not express explicit positive or negative feelings but were more focused on specific factors that could influence their opinion.

Negative sentiment: There were no explicitly negative responses provided in the list (0 out of 37).

Overall, the sentiment towards the proposed petrol station appears to be predominantly positive, with the majority of respondents anticipating benefits for the community.

Research Findings – Key Findings

Tweedbank Service

Station

Those in the population of interest (base: 74) were asked about their future usage of the facility in relation to alcohol purchase...

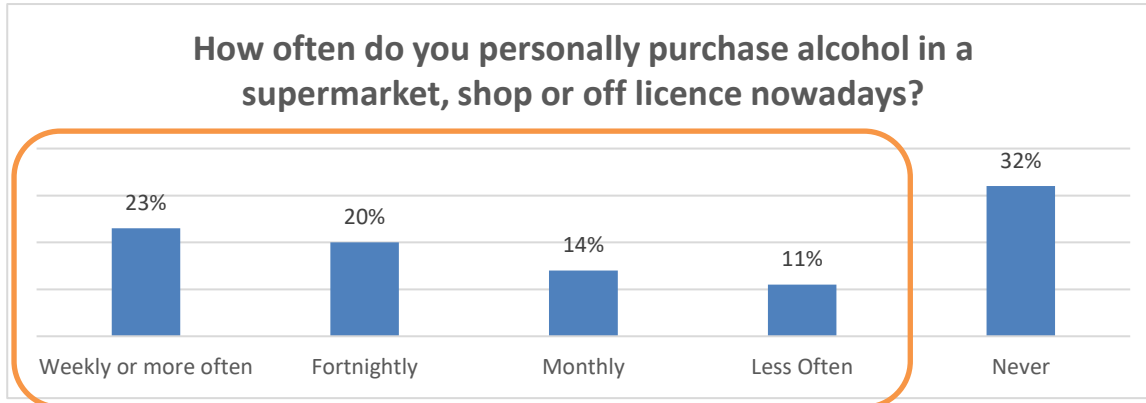


Figure 10 – Base 74

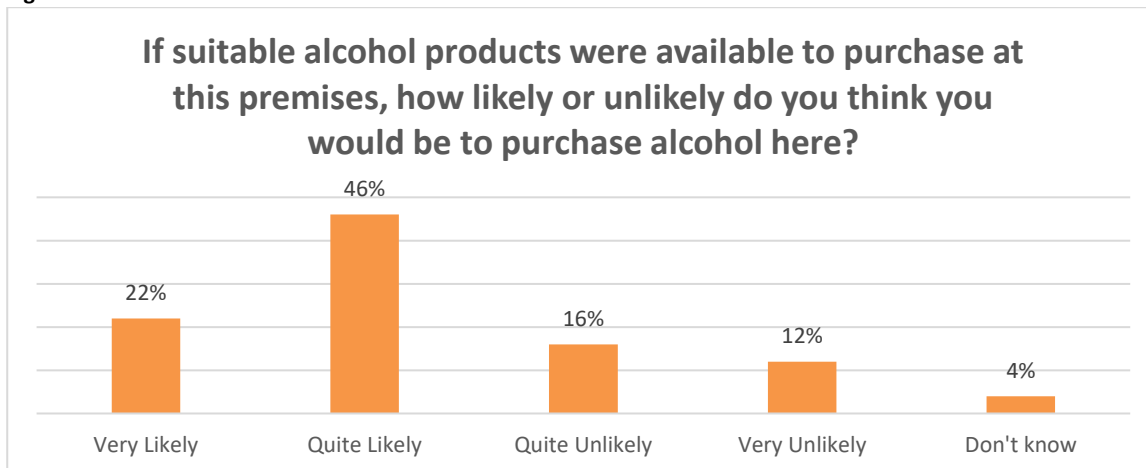


Figure 11 – Base 50

68% of participants stated that they would be likely to purchase alcohol from the premises if it was available.

Research Findings – Key Findings Tweedbank Service

Station

The graphs below highlight the demographic of those who stated they would be disadvantaged or inconvenienced were this premises to not open and therefore unable to provide them with: a) Petrol or DERV (Fuel)? b) Groceries. Base: 13

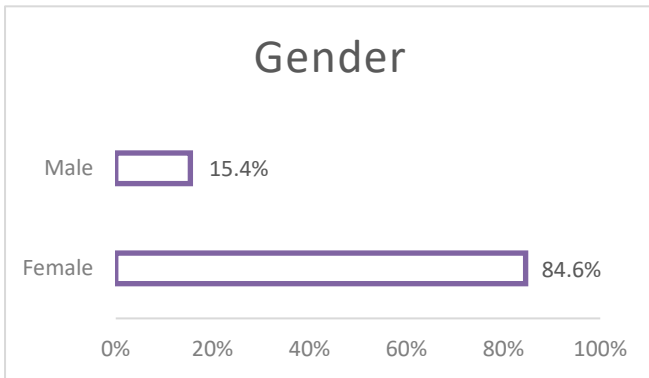


Figure 12 – Base 13

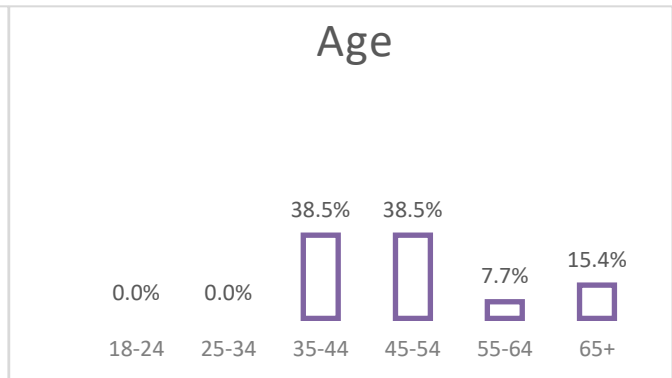
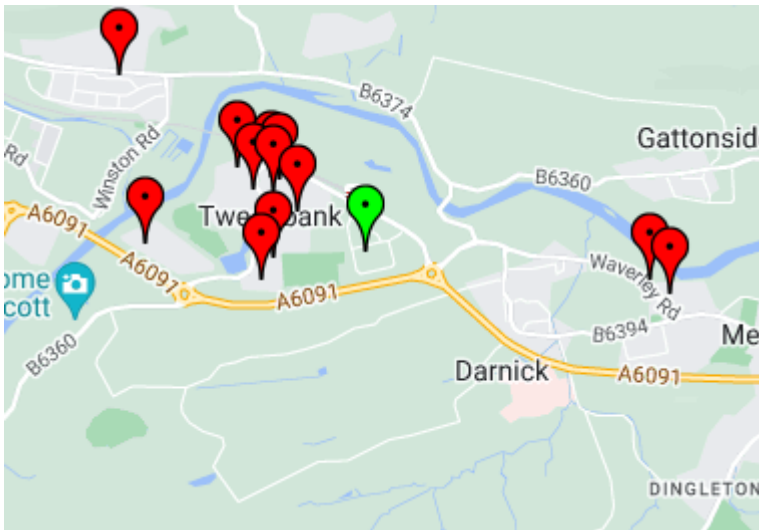


Figure 12 – Base 13



Map 2 – Base 13

Average visits per week

Grocery Shopping <i>Base 1</i>	2 visits per week
Fuel Purchase <i>Base 13</i>	1.44 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 years has been down to the dedication of our skilled, reliable and creative staff.

TMcK's research team is headed up by Director Nicky Taylor who has extensive knowledge of consumer research in Scotland. 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 Laura Taylor (Director) 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 potential consumers who may visit the proposed forecourt premises with the purpose of ascertaining whether or not their proposed 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 would see and treat the proposed premises as the **principal source**² from which they would, 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 not open and therefore be unable to provide 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 not to open and therefore 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.

Population	%GIVING PARTICULAR ANSWER		
	10%/90%	30%/70%	50%
Total Base 228	+ 3.89	+ 5.95	+ 6.49
Local Base 193	+ 4.23	+ 6.47	+ 7.05
Pop of interest Base 74	+ 6.84	+ 10.44	+ 11.39
Inconvenienced Base 13	+ 16.31	+ 24.91	+ 27.18

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

Tweedbank Service Station

Q2 How far away from this site 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 CLOSE

Within 1.5 to 2 miles CLOSE

Within 2 to 10 miles CLOSE

More than 10 miles away (approx.) CLOSE

Q3 If you were to use this filling station once it has opened, which of these best describes how you would be most likely to travel to this filling 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 Once this filling station has opened, do you think you would be likely to use 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

Unlikely to use this service station..... CLOSE

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 think you would 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 think you would 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 Again thinking about when this petrol station has opened, do you think you would 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 not to open up, and therefore 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 not to open up, and therefore to be unable to provide you with...

Showcard s7b

Groceries

Would you have an alternative grocery source you could use?

Is this alternative grocery source available to you without causing you to be disadvantaged or inconvenienced in any way?

If no: Why is this? (probe fully)

Yes

No

Q10 Finally: How often do you personally purchase alcohol in a supermarket, shop or off licence nowadays?

- Weekly or more often
- Fortnightly
- Monthly
- Less Often
- Never

Q11 If suitable alcohol products were available to purchase at this premises, how likely to unlikely do you think you would be to purchase alcohol here?

- Very likely
- Quite likely
- Quite Unlikely
- Very Unlikely
- Don't know

Why have you given the above answer? -

Q12 Do you have any further comments you would like to make about the new petrol station opening in Tweedbank?

Q13 Record Gender

- Male
- Female

Q14 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

"Q8b - Would you consider yourself materially disadvantaged or inconvenienced were this premises to be unable to provide you with Fuel? If yes: Why is this?"

"Nearest is faraway"

"Nothing nearby"

"Quite far to go for fuel"

"Rest are further away"

"Too far to go for others"

"Have to go further"

"Much nearer in Tweedbank"

"No other petrol station in Melrose or tweedbank"

"Just because it's nearer ease of access for petrol"

"Sometimes I am low on petrol and it's inconvenient to go into town"

"Because no petrol station in my area also for groceries this would be nearer than Gala"

"Got to go further into Gala"

"Driving all the way to Gala for petrol"

Q8e: If NO: Why would this fuel source cause you to be disadvantaged or inconvenienced? Include as much detail as possible:

"It would be"

Appendix 4 – Postcodes of Population of Interest

"Td1 3je"	"TD6 9BT"
"TD1 3st"	"Td1 3su"
"TD1 3rz"	"TD6 9SL"
"TD1 2qh"	"TD13RB"
"TD1 3SQ"	"TD13RE"
"Td6 9aa"	"TD13ST"
"Td6 9ad"	"TD13SS"
"TD1 3SU"	"TD69AA"
"Td1 3rl"	"TD13SY"
"TD6 9AD"	"TD13SY"
"Td1 3su"	"TD13RB"
"TD1 3RY"	"TD12DN"
"TD1 2EH"	"TD13SY"
"TD1 3SH"	"TD13SY"
"TD1 3RY"	"Td13ST"
"Td1 3rf"	"TD13ST"
"Td1 3jz"	"TD13SY"
"TD1 3st"	"TD13ST"
"TD6 9SG"	"TD13SY"
"Td6 9AL"	"TD69AE"
"TD1 3RB"	"TD13SY"
"TD1 3SG"	"TD13ST"
"TD6 9ST"	"TD13ST"
"TD6 9AW"	"TD13SQ"
"TD6 9ST"	"TD13ST"
"TD1 2LN"	"TD13RB"
"TD1 2DS"	"TD13ST"
"TD1 3SA"	"TD13ST"
"Td1 3er"	"TD13RB"
"TD1 3SA"	"TD69SX"
"TD1 3RD"	"TD69SG"
"TD6 9AY"	"TD1 3TB"
"TD1 3SX"	"TD1 3RS"
"TD1 3SB"	"TD1 3RS"
"Td1 3ss"	"TD1 3RN"
"TD6 9SN"	"TD1 3RY"
"TD6 9AY"	"TD1 3RF"