

APPENDIX 3.1
(referred to in paragraph 3.16)

Survey of consumers

1. A survey of consumer attitudes towards petrol prices and petrol station facilities was carried out for the MMC in July 1989. A representative sample of adults was interviewed as part of RSGB's¹ monthly General Omnibus Survey. The sample was drawn from 136 parliamentary constituencies and included set quotas of men and women. 3,863 successful interviews were completed giving a grossed-up total of 4,000 responses.

2. Respondents were asked about their normal practice in buying petrol and about their reasons for choosing particular petrol stations. The responses have been broken down according to the sex, age and social group of respondent and by region.

3. The first step in the survey was to identify whether the respondent drove a car and regularly bought petrol for it. Just under half (1,909 or 48 per cent) of respondents fell into this category. Of these, nearly all (91 per cent) had privately-owned cars. There was a slightly higher level of company car use (15 per cent) amongst the 25 to 34 age group and in the AB social group.

Private car owners

4. Of the private car owners nearly three-quarters (74 per cent) usually used the same petrol station. These 'regular users' were asked to indicate one from a list of possible reasons for their choice of station. A similar question was asked of those private car owners who were not 'regular users'. These responses are summarised in Table 1.

TABLE 1 Private car owners' reasons for choice of petrol stations

<i>Weighted sample</i>	<i>Usually use same station</i>	<i>Do not usually use same station</i>
	1,283	443
		<i>per cent</i>
It is cheaper on the whole	21	26
Offers gifts, stamps etc	7	3
Accepts credit cards	1	2
Has forecourt facilities eg: shops, which I like	3	2
Wish to buy that brand	5	4
Convenient to house/office	55	59
Have an account	2	-
Other and don't know	6	4

5. Location is by far the most important factor affecting the choice of both groups, followed by price. Special offers and facilities are seldom given as the main reason for choosing a station.

6. Respondents were also asked how much cheaper petrol would have to be before they would go out of their way to use a particular station. Half indicated that price did not make any difference and 38 per cent said that the price difference would have to be more than 5 ppg. The responses are set out in Table 2.

¹ Research Surveys of Great Britain Ltd.

TABLE 2 Private car owners' response to price differences

How much cheaper must petrol be before going out of your way to buy?

<i>Weighted sample</i>	<i>1,741</i>
	<i>per cent</i>
Less than 2 ppg	1
2 to 5 ppg	7
More than 5 ppg	38
Price doesn't make a difference	50
Don't know	4

Company cars

7. Company car users were asked a similar set of questions, but because of the small number of these users in the sample the results are less reliable and are not considered in detail here. Location of the petrol station was again the most important factor determining choice, particularly for those not regularly using the same station. Price of petrol was less important and credit payment, whether by credit card or an account, was more significant than for private users. About 60 per cent of company car users said that price did not make any difference to choice.