

## Appendix

### Survey Questionnaire

1. What factors illustrated below in the degree from most important in making your buying decision for purchase of MS/HSD:
  - a) Product
  - b) Price
  - c) Promotion
  - d) Place (Proximity)
  
2. In the product what is important to you:
  - a) Quantity of product
  - b) Quality of product
  - c) Product mix (Specialty – Premium product)
  - d) Additional product
  
3. In the payment mode what is important:
  - a) Ease of payment (Card/UPI)
  - b) Discount
  - c) Credit
  - d) Loyalty points
  
4. In the place option, what is important:
  - a) En-route place of work.
  - b) Accessibility
  - c) Proximity
  - d) Queue

5. In the promotion, what is most important:
- a) Premium Brands
  - b) Brand Ambassador
  - c) Endorsement
  - d) Lucky draw and other schemes
6. Value Added Service:
- a) Add-on services (Air, Tyre Puncture services, Oil change, Wind shield cleaning etc.)
  - b) Rest room and Toilet facilities
  - c) Recreation (music, Confection stores, Dhaba etc.)
  - d) Car wash etc.
7. Refuelling experience at RO:
- a) Courtesy and Marshalling of the staff
  - b) Customer complaint and redressal system
  - c) Uniform
  - d) House keeping

*Feasibility and Convenience*

**8 How frequently do you go to filling stations to purchase petrol or Diesel?**

- a. Daily
- b. Weekly
- c. Monthly
- d. Rarely
- e. Never

**9 Do you prefer for convenience to reach petrol station, and prefer to fo for your regular routes?**

- a. Very convenient
- b. Somewhat on convenience
- c. Not so convenient
- d. Not convenient at all
- e. Never

**10 Do you feel that the operating hours at the petrol stations are convenient?**

- a. Very convenient
- b. Somewhat convenient
- c. Should be changed
- d. Not very convenient
- e. Not at all

***Pricing***

**11 On what level would you rate the pricing of the Petrol and Diesel, at the petrol pump, in the past decade?**

- a. Very affordable
- b. Affordable
- c. Expensive
- d. Should be reduced
- e. Not satisfied at all

**12 At the petrol station, are you satisfied with the transparency of pricing and work?**

- a. Very satisfied
- b. Satisfied
- c. Neutral
- d. Dissatisfied
- e. Highly dissatisfied

**13 Would you be happy and preferable to pay higher price for sustainable and eco-friendly fuel?**

- a. Yes
- b. No
- c. Maybe

**14 As some petrol and diesel brands charge a high price for offering high quality fuel. Would you prefer to go for that?**

- a. Yes
- b. No
- c. Maybe
- d. Sometime
- e. Often

***Quality and Quantity***

**15 How would you rate the quality of petrol and diesel that you receive at your petrol stations?**

- a. Excellent
- b. Good
- c. Average

- d. Poor
- e. Can't say

**16 Have you ever faced issues with the quantity of fuel that is delivered?**

- a. Yes
- b. No

**17 Did you ever experienced the fuel spillage when using the stations?**

- a. Yes
- b. No

**18 In case of any fuel spill has made while filling the petrol, did you get satisfied services?**

- a. Yes, they refilled the fuel that spilled.
- b. No, nothing was done.
- c. They gave some additional assistance

**19 *How will you rate the speed of fuel dispensing on petrol station?***

- a. Very fast
- b. Fast
- c. Average
- d. Slow
- e. None

**20 **How important is the fuel brand, while purchasing the fuel at the pump?****

- a. Very important
- b. Important
- c. Neutral

- d. Not so important
- e. Does not matter

***Eco-Friendly and Cleanliness***

**21 Does the petrol station have eco-friendly options for fuel, such as Biodiesel or E85?**

- a. Yes
- b. No
- c. Not sure

**22 How would you rate the cleanliness of the petrol station and does it maintain cleanliness?**

- a. Very clean
- b. Clean
- c. Somewhat clean
- d. Dirty
- e. Very dirty

**23 Are you aware of any environmental practices that the petrol pump has adopted?**

- a. Yes
- b. No

***Proximity and Density***

**24 Is the location of the petrol pump conveniently located in the proximity of the house or the workplace?**

- a. Very convenient
- b. Convenient
- c. Somewhat convenient

- d. Inconvenient
- e. Can't say

**25 How would you rate the density of the fuel density at the petrol station?**

- a. Excellent
- b. Good
- c. Average
- d. Poor
- e. Neutral

***Mode of Payment***

**26 Which mode of payment do you prefer while making the purchase of the fuel?**

- a. Cash
- b. Credit or Debit Card
- c. Mobile wallet
- d. UPI
- e. Online Banking

**27 Does the petrol station offer multiple modes of payment?**

- a. Yes
- b. No
- c. Others

*Extra Services*

**28 Does the petrol station offer on the additional extra services, please select on the extra services offered.**

- a. Car wash
- b. Windshield cleaning
- c. Water filling station
- d. Air filling
- e. Tire inflation
- f. None

**29 Are you satisfied with the extra assistance from the petrol pump?**

- a. Very satisfied
- b. Satisfied
- c. Neutral
- d. Not so satisfied
- e. Dissatisfied

**30 Does the staff of the petrol station providing assistance, and how would you rate the petrol pump?**

- a. Excellent
- b. Good
- c. Average
- d. Poor
- e. Can't Say

**31 Are you satisfied with the benefits and rewards given by the petrol station?**

- a. Very satisfied
- b. Satisfied
- c. Neutral
- d. Not so satisfied
- e. Dissatisfied

**32 Does the sign and information directions given at the fuel station are clear, direct and helpful?**

- a. Very clear
- b. Clear
- c. Somewhat clear
- d. Unclear
- e. Not given

## **Interview Questionnaire**

1. Can you share any discount programs or promotional program that you offer for retaining regular customers?
2. Do you have any differentiations such as uniforms, or any other strategy from your competitor in the area?
3. Do you use any digital platforms to stay connected and engaged with the customers and get with feedbacks?
4. Do you ensure safe and clean environment at the pump. If yes, then How?
5. Are the water coolers regularly cleaned and water quality checked to maintain health for people who drink water from the pump?
6. Are the restrooms properly cleaned and maintained to ensure hygiene? In what intervals does the cleanliness is done?
7. Have you made efforts towards environmental responsibility. If yes, then How?
8. What strategies are you integrating in to maintain a strong connection with the customers?
9. In your opinion, how are the fuel choices of customers and their behaviour is changing?
10. What Value Added Services are you offering to attract the customers to be retained with your outlets?
11. Do you think that these promotional offers and VAS helps you to retain the customers, or it is entirely about the quality?

## **Types of Market – IOCL Retail Outlets**

**Class A Market** – “A” Class cities i.e. Metropolitan cities and other cities (areas covered under Municipal limits of a city) having population more than 20 lakhs as per 2011 census.

**Class B Market** – Cities (areas covered under Municipal limits of a city) having population more than 4 lakhs and upto 20 lakhs as per 2011 census.

**Class C Market** – All other towns/ cities (areas covered under Municipal limits of a town/ city) and not covered under “A” & “B” class markets & locations not on NH/ SH.

**Class D Market** – Retail Outlets on National Highways (D1)/ State Highways (D2). In case of Express ways, Coastal Highways, etc., same will be categorized as D1 or D2 based on its jurisdiction with central/ State authority

**Class E Market** – Retail Outlets in Rural Areas (areas not covered under municipal limits of a town) and not falling under A, B, C, & D Class of markets.

## **Players in the Market**

State Owned Oil Marketing Companies :

1. Indian Oil Corporation Ltd. (IOCL)
2. Hindustan Petroleum Corporation Ltd. (HPCL)
3. Bharat Petroleum Corporation Ltd. (BPCL)

Private Players In Oil Marketing:

1. Reliance-British Petroleum Ltd. (RIL-BP Ltd.)
2. Shell (India) Pvt. Ltd.
3. Nayara Energy Ltd.

There are other fringe players which are non-existent in Vadodara District viz. Assam Oil Division, MRPL etc. These are scattered players with negligible & inconsequential presence.

**Sales Figures of Motor Spirit & High Speed Diesel of All Oil Companies In Vadodara**

**District**

OMC	Total ROs	MS (KL)		Market Share		
		2023-24	2022-23	MS		
				CY	LY	Gain
IOCL	98	62668	63854	22.96	24.78	-1.82
BPCL	70	78852	78558	28.89	30.48	-1.59
HPCL	57	44806	45345	16.42	17.60	-1.18
NEL	69	62425	49793	22.87	19.32	3.55
RIL	14	16288	10200	5.97	3.96	2.01
Shell	13	7878	9953	2.89	3.86	-0.98
<b>Total</b>	321	272917	257703			

OMC	Total ROs	HSD (KL)		HSD		
		2023-24	2022-23			
				CY	LY	Gain
IOCL	98	111409	140383	28.82	35.03	-6.21
BPCL	70	121584	126051	31.46	31.46	0.00
HPCL	57	71769	78842	18.57	19.67	-1.11
NEL	69	53179	39606	13.76	9.88	3.88
RIL	14	27744	13107	7.18	3.27	3.91
Shell	13	831	2738	0.21	0.68	-0.47
<b>Total</b>	321	386516	400727			

Source : IOCL-OMC exchange Figs. 2023 & 2024.

