



Press Release

J.D. Power Asia Pacific Reports: Customer Satisfaction with Self-Service Stations in Japan Decreases, As the Increase in the Number of Self-Service Station Users Slows

ENEOS and MITSUI Rank Highest in Customer Satisfaction among Service Stations in Japan In Their Respective Segments

TOKYO: 17 August 2010 — Customer satisfaction with self-service stations declines from 2009, as the number of self-service station users has grown more slowly than in past years, according to the J.D. Power Asia Pacific 2010 Japan Service Station Customer Satisfaction StudySM released today.

Overall satisfaction with self-service stations decreases to 621 on a 1,000-point scale, a 13-point decline from 2009. In the self-service segment, satisfaction declines in fuel prices, payment and operations. In the full-service segment, satisfaction improves by 4 points from 2009 to 643, on average.

The study finds that the proportion of customers who use self-service stations has increased to 67 percent in 2010, compared with 64 percent in 2009. However, the rate of growth of self-service station users, which had grown considerably for several years, has slowed in more recent years, suggesting that the number of users has leveled off.

“In recent years, the number of self-service station chains has rapidly increased as a result of low prices, new facilities and ease of access,” said Ryutaro Nakao, manager at J.D. Power Asia Pacific, Tokyo. “However, self-service stations are no longer novel in their existence or in the services they offer, so it is more difficult than ever for them to attract customers.”

The study, now in its sixth year, measures customer satisfaction with service station chains in two segments: full-service and self-service. Full-service stations are evaluated by customers based on five factors (listed in order of importance): staff (31%); full-service operation¹ (21%); facility (20%); product/service (14%); and payment (13%). Self-service stations are also evaluated based on five factors (in order of importance): self-service operation² (22%); facility (22%); payment (21%); staff (19%); and product/service (15%).

Among full-service chains, ENEOS ranks highest with a score of 651 and performs particularly well in the facility and full-service operation factors. Following ENEOS in the segment rankings are Shell (649) and COSMO (648). Shell performs particularly well in the facility factor, while COSMO performs well in the staff factor.

MITSUI ranks highest among self-service station chains with a score of 636 and performs particularly well in the payment; product/service; and self-service operation factors. Following MITSUI in the segment rankings are JOMO (635) and Shell (629). JOMO and Shell both perform well in the staff and facility factors.

The study finds that highly satisfied customers indicate high levels of repurchase intention and using more non-fuel offerings. For instance, among highly satisfied customers (scores of 800 or higher), 81 percent say they would use the service station in the future. In comparison, just 14 percent of full-service customers and 17 percent of self-service customers with low satisfaction scores (500 or lower) say the same.

¹ This factor includes aspects of full-service such as cleaning car windows and ashtrays and providing directions.

² This factor includes aspects of self-service such as safety and cleanliness of gas-dispensing equipment.

The study also finds that the aspects customers indicate are most important should be the focus of stations in both segments in order to improve overall satisfaction. For example, customers of full-service stations indicate that a comfortable sales room, particularly when it is clean, air-conditioned, bright and includes a product display, is important. Customers of self-service stations indicate that staff-related behaviors are most important, especially being greeted, the staff's demeanor and care of the customer.

“Obviously, service station chains that have been operating for some time have some weaknesses, such as aging facilities among full-service stations and shortage of staff among self-service stations,” said Nakao. “However, with full-service station chains declining in number each year and the proportion of self-service station users also slowing, it is vital for service stations to overcome such weaknesses and outperform competitors by making service station environments more comfortable and attractive to customers.”

The 2010 Japan Service Station Customer Satisfaction Study is based on responses from a total of 12,214 vehicle owners—5,347 in the full-service segment and 6,867 in the self-service segment. The study was fielded in May 2010.

About J.D. Power Asia Pacific

J.D. Power Asia Pacific has offices in Tokyo, Singapore, Beijing, Shanghai and Bangkok that conduct customer satisfaction research and provide consulting services in the automotive, information technology and finance industries. Together, the offices bring the language of customer satisfaction to consumers and businesses in China, India, Indonesia, Japan, Malaysia, Philippines, Taiwan and Thailand. Information regarding J.D. Power Asia Pacific and its products can be accessed through the Internet at <http://www.jdpower.co.jp/> Media e-mail contact: cc-group@jdpower.co.jp

About J.D. Power and Associates

Headquartered in Westlake Village, Calif., J.D. Power and Associates is a global marketing information services company operating in key business sectors including market research, forecasting, performance improvement, Web intelligence and customer satisfaction. The company's quality and satisfaction measurements are based on responses from millions of consumers annually. For more information on car reviews and ratings, car insurance, health insurance, cell phone ratings, and more, please visit JDPower.com. J.D. Power and Associates is a business unit of The McGraw-Hill Companies.

About The McGraw-Hill Companies

Founded in 1888, The McGraw-Hill Companies (NYSE: MHP) is a leading global information services provider meeting worldwide needs in the financial services, education and business information markets through leading brands such as Standard & Poor's, McGraw-Hill Education, and J.D. Power and Associates. The Corporation has more than 280 offices in 40 countries. Sales in 2009 were \$5.95 billion. Additional information is available at <http://www.mcgraw-hill.com>.

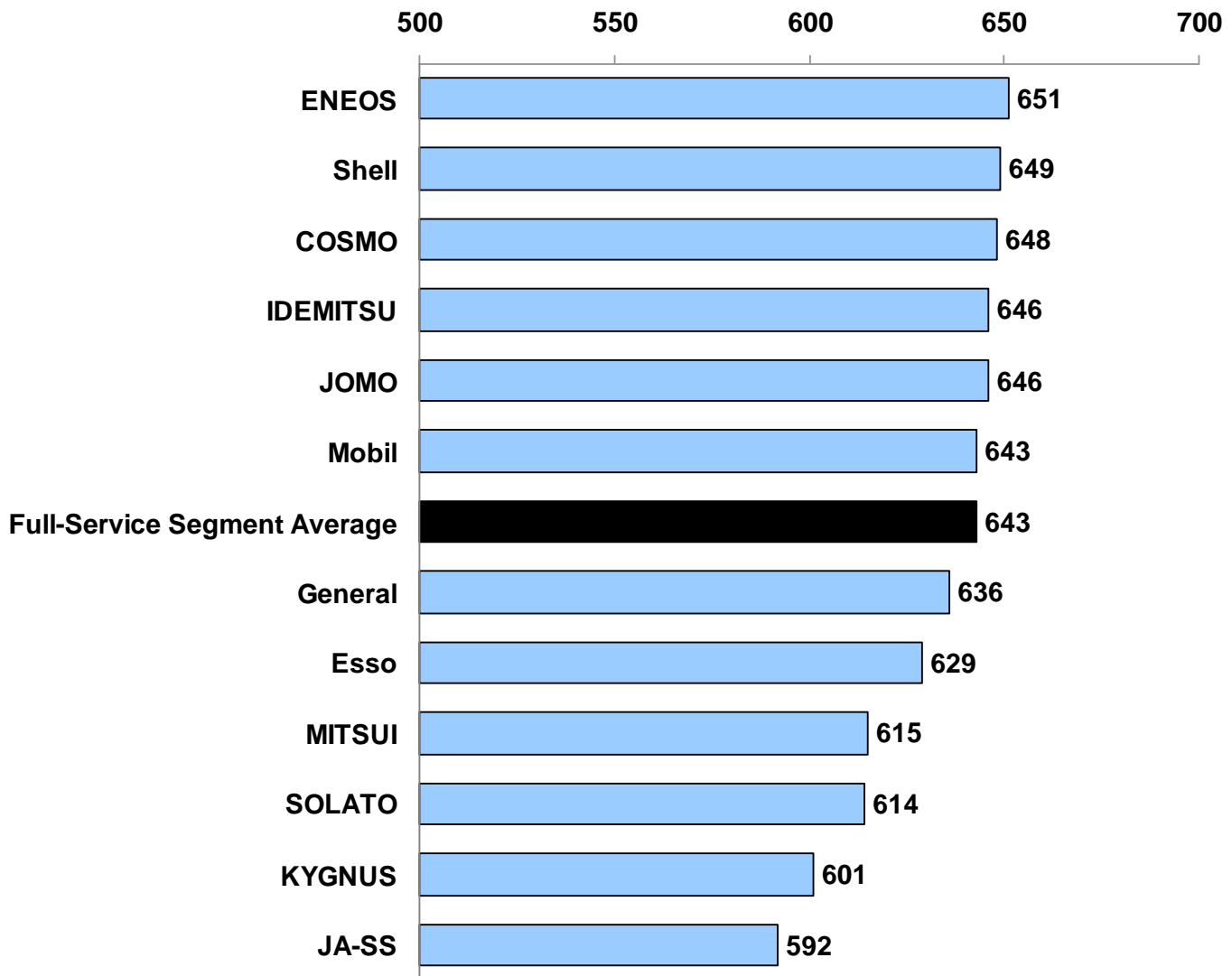
Media Relations Contacts:

Shizue Hidaka; J.D. Power Asia Pacific; Toranomom 45 MT Bldg. 8F; 5-1-5 Toranomom; Minato-ku, Tokyo; Japan 105-0001; Phone +81-3-4550-8090; cc-group@jdpower.co.jp.
John Tews; Director, Media Relations; J.D. Power and Associates; 5435 Corporate Drive, Suite 300; Troy, MI, 48098 USA; 001 248-312-4119; john.tews@jdpa.com

No advertising or other promotional use can be made of the information in this release without the express prior written consent of J.D. Power and Associates. <http://www.jdpower.com/corporate/>

J.D. Power Asia Pacific 2010 Japan Service Station Customer Satisfaction StudySM

Customer Satisfaction Index Ranking Full-Service Segment (Based on a 1,000-point scale)



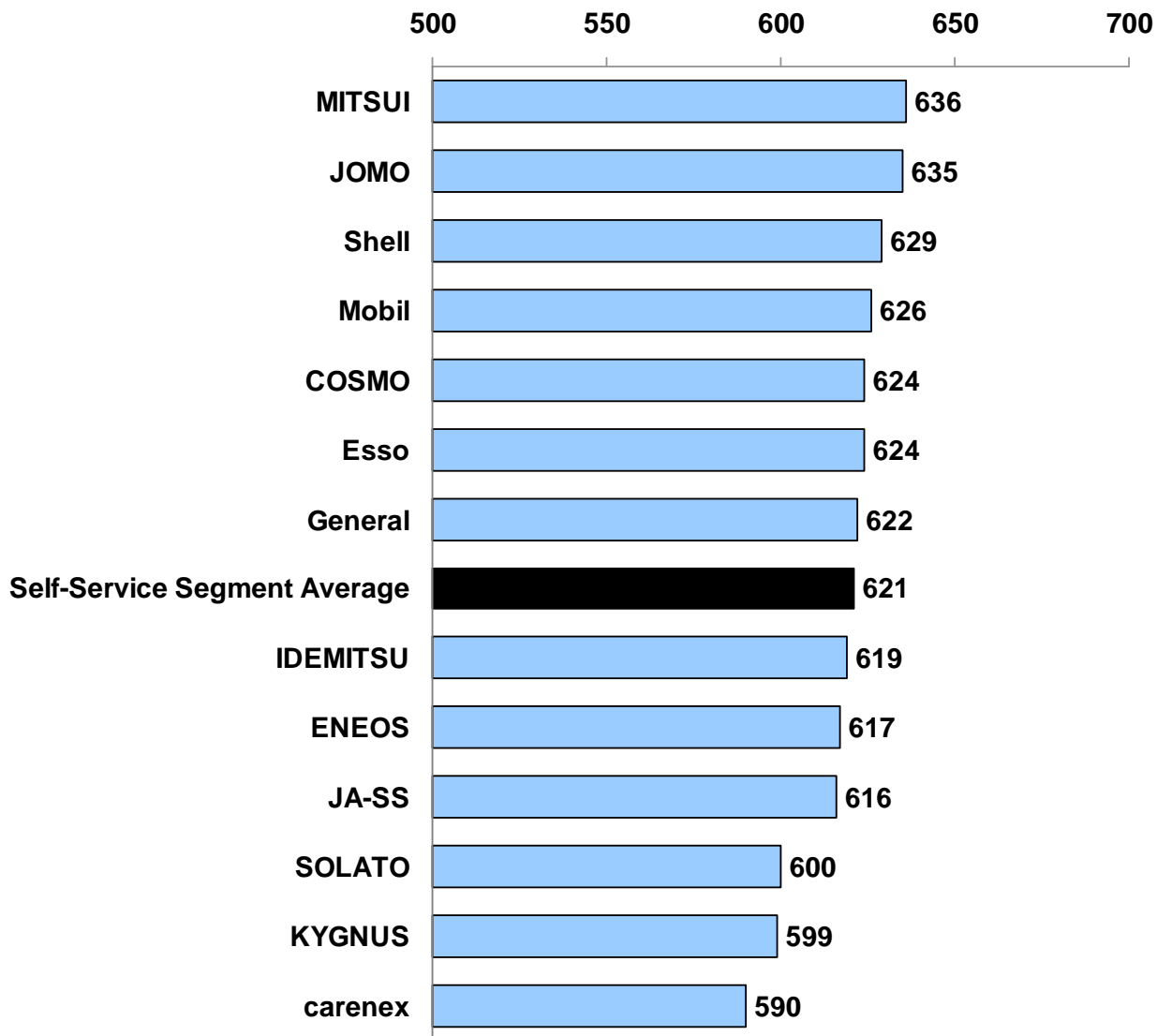
NOTE: Included in the study, but not ranked due to small sample size is carenex.

Source: J.D. Power Asia Pacific 2010 Japan Service Station Customer Satisfaction StudySM

Charts and graphs extracted from this press release must be accompanied by a statement identifying J.D. Power Asia Pacific as the publisher and the J.D. Power Asia Pacific 2010 Japan Service Station Customer Satisfaction StudySM as the source. Rankings are based on numerical scores and not necessarily on statistical significance. No advertising or other promotional use can be made of the information in this release or J.D. Power Asia Pacific study results without the express prior written consent of J.D. Power Asia Pacific.

J.D. Power Asia Pacific 2010 Japan Service Station Customer Satisfaction StudySM

Customer Satisfaction Index Ranking Self-Service Segment (Based on a 1,000-point scale)



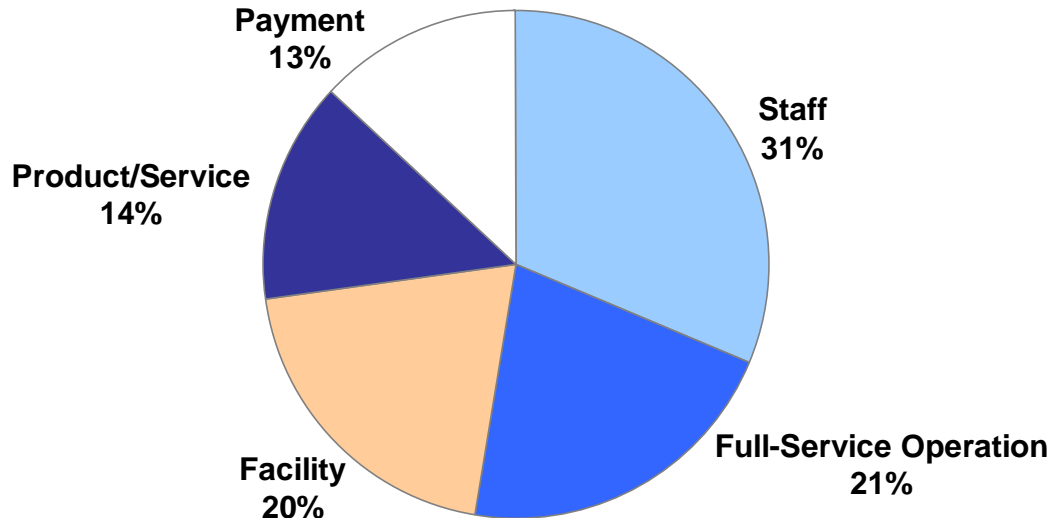
Source: J.D. Power Asia Pacific 2010 Japan Service Station Customer Satisfaction StudySM

Charts and graphs extracted from this press release must be accompanied by a statement identifying J.D. Power Asia Pacific as the publisher and the J.D. Power Asia Pacific 2010 Japan Service Station Customer Satisfaction StudySM as the source. Rankings are based on numerical scores and not necessarily on statistical significance. No advertising or other promotional use can be made of the information in this release or J.D. Power Asia Pacific study results without the express prior written consent of J.D. Power Asia Pacific.

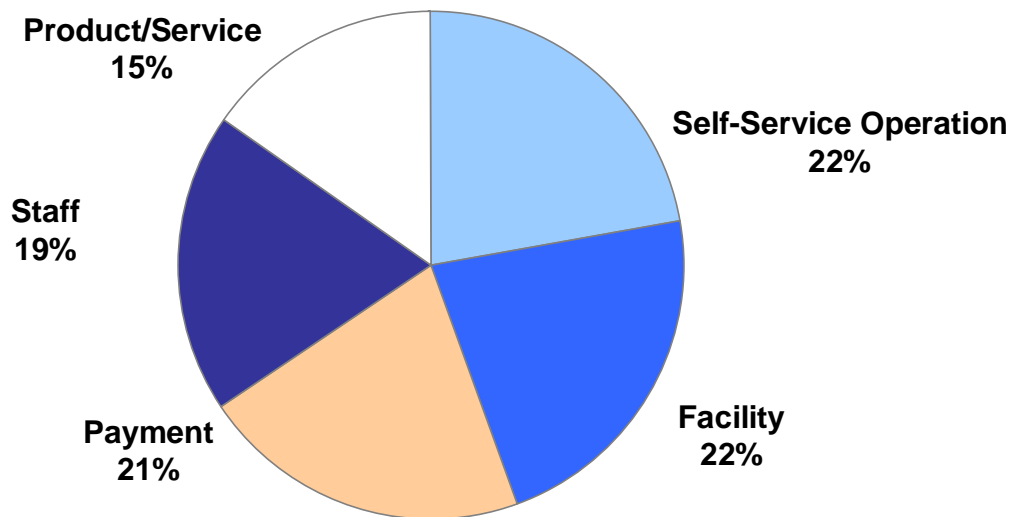
J.D. Power Asia Pacific 2010 Japan Service Station Customer Satisfaction StudySM

Factors Contributing to Overall Satisfaction

Full-Service Segment



Self-Service Segment



Note: Percentages may not total 100 due to rounding.

Source: J.D. Power Asia Pacific 2010 Japan Service Station Customer Satisfaction StudySM

Charts and graphs extracted from this press release must be accompanied by a statement identifying J.D. Power Asia Pacific as the publisher and the J.D. Power Asia Pacific 2010 Japan Service Station Customer Satisfaction StudySM as the source. Rankings are based on numerical scores and not necessarily on statistical significance. No advertising or other promotional use can be made of the information in this release or J.D. Power Asia Pacific study results without the express prior written consent of J.D. Power Asia Pacific.