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CONSUMER MOTIVATIONS IN FORECOURT CONVENIENCE RETAILING IN SOUTH AFRICA

A research project submitted to the Gordon Institute of Business Science, University of Pretoria, in partial fulfilment of the requirements for the degree of Master of Business Administration

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ABSTRACT

The proliferation of forecourt convenience shops in South Africa spawned an entirely new model within an existing fuel sales business model. Conversely South Africa's regulated fuel industry was stunned by a near merger of Sasol and Engen, which led to petrol stations looking for new ways to attract business. The forecourt convenience shops are not price regulated and hence have become a strategic revenue generator for petrol station operators. These factors made the study of consumer motivations in forecourt convenience retailing necessary.

Specific research hypotheses were formulated, based on a literature review, in order to prove or disprove the researcher's viewpoint and fully appreciate consumer motivations. A survey of 115 convenience shop patrons was undertaken, the data was analysed statistically and hypotheses were then either rejected or failed to be rejected.

Petrol brands play no role in consumer motivations, while forecourt shops independently play a role in why people shop. Age plays no role in motivations, whereas gender does, as more men shop at forecourt shops than do women. White people buy more from these outlets than non-whites. Hygiene factors and motivators do not lead to greater spending, but motivators alone lead to repatronage. Total customer experience leads people to shop more often. Price plays no role in customers' intentions to repatronise the stores.

DECLARATION

I declare that this research project is my own work. It is submitted in partial fulfilment of the requirements for the degree of Master of Business Administration at the Gordon Institute of Business Science, University of Pretoria. It has not been submitted before for any degree or examination in any other University.

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Montoeli Mosikoane Molefe.

14 November 2006

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1.0. Introduction

Forecourt convenience retailing has fundamentally changed the business model of oil companies globally. South Africa has not been a laggard in following this development. Terblanche (1998) already noted the trend of the conversion of filling stations catering for convenience retailing. According to marketing research company AC Nielsen (2006) over 1 400 forecourts have opened in South Africa over the last ten years, with an annual growth rate of 19.3% (a growth of more than five times the average CPIX (Consumer Price Index Excluding Mortgages) of 3.7% and a market size of R 4,7 billion. A growing number of filling stations are offering Value Added Services rather than simply offering only the traditional petrochemical products.

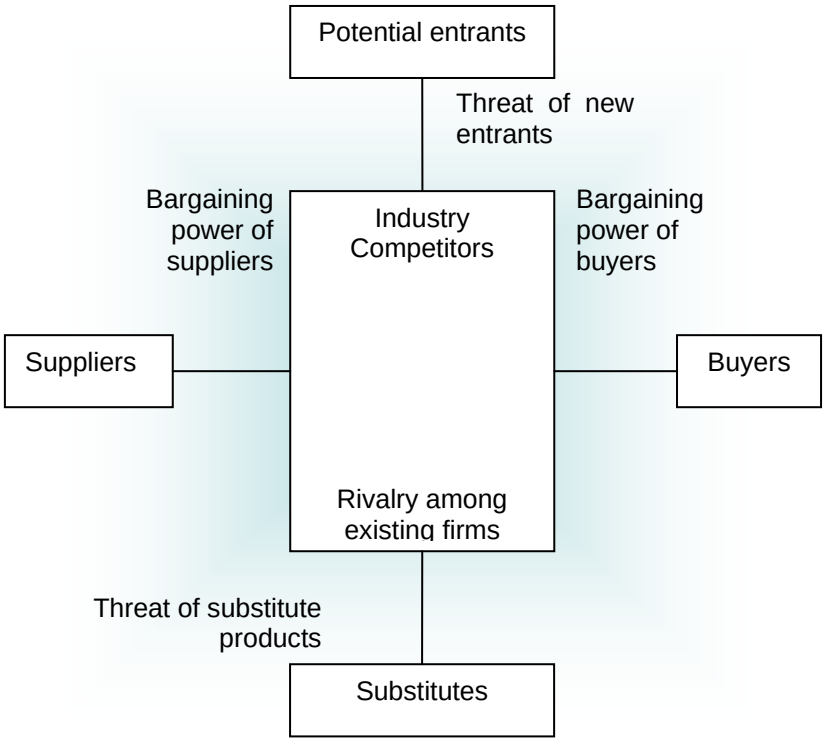
The proposal to form Uhambo by merging Sasol and Engen created a lot of anxiety in the petroleum sector in South Africa. According to FIN24 (2005) the merged entity would have controlled 48% of South Africa's refining capacity and 34% of the retail market. This merger was vehemently opposed by all the other oil companies because of the threat of monopoly power posed by the merged entity. This near merger of Sasol and Engen hastened the business model shift from petrol stations offering some convenience items to a model of retailing, where fuel is but one of the many product offerings.

In South Africa, the margins on petroleum products other than diesel are regulated by the Department of Minerals and Energy. Forecourt convenience stores' margins are not regulated, thus creating a competitive edge for the oil companies and/or their retailers depending on who owns the filling station property and/or operations. This unregulated component makes the understanding of consumer motivations for shopping in the forecourt convenience shops a necessity. The understanding of consumer motivations can lead to superior and sustained competitive advantage for the company that delivers on those motivations.

1.1. The Structure of the Petroleum Industry in South Africa

The petroleum industry in South Africa is regulated by the Department of Minerals and Energy, which sets both the retail and wholesale margins; wholesalers, retailers and consumers are price takers according to Monama (2006). The industry is analysed using Porter's (1980) five forces to assess the long-run average industry profitability. That assessment can and will be used to ascertain if there are any industry attributes specific to the South African context that show long term profitability.

Figure 1 - Industry Analysis



(**Source:** *Competitive Strategy: Techniques for Analyzing Industries and Competitors*. By Michael E. Porter (1980))

1.1.1. Degree of Rivalry among Existing Firms

The nature of the oil industry in South Africa based on the statutory requirements, number (5) and relative size of the competitors created concentration of the industry supports Collis' and Montgomery's (2005) view that naturally there will be no rivalry under such conditions.

1.1.2. Threat of New Entrants

Setting up a fully integrated oil company with both up and downstream capabilities is a costly exercise and a new entrant will be faced with entrenched customer loyalty, high capital costs and poor access to distribution channels. This view is echoed by Collis and Montgomery (2005); and Monama (2006) clearly defines the

state's role in further creating additional legislative requirements. All these issues depict a low threat of entry in the South African market.

1.1.3. Threat of Substitutes

In South Africa, the threat of substitutes to the oil company core input comes from Sasol which uses coal rather than crude oil to create petroleum products. However, Sasol still provides only a fraction of the South African fuel requirements. In reality, the end-products, petrol and diesel do not really have substitutes in South Africa, leaving the industry from a consumer perspective with no substitutes. This lack of substitutes for petroleum products, in Collis and Montgomery's (2005) opinion, leaves the amount of value this industry can create uncapped.

1.1.4. Buyer Power

There is no buyer power in South Africa because of the regulated price of petroleum products. The fact that most of the global players are fully vertically integrated leaves no room for a third party to enter the Value Chain and appropriate some benefits for the consumers. Benefits are fully appropriated by the oil companies along the value chain as fully depicted in Figure 2. The individuality of end customers supports Collis and Montgomery (2005) in their assertion that items which are of high importance such as petroleum reduces the buyer's price sensitivity and ultimately his/her power. Lack of substitutes and ability of buyers to create their own refineries and prospect for oil (backward integration) further erodes buyer power.

1.1.5. Supplier Power

Collis and Montgomery (2005), state that supplier power is the mirror image of buyer power. In the South African context, the legislative requirements add power to existing suppliers, over and above the already concentrated and vertically integrated industry.

The analysis of the South African oil industry, based on Porter's (1980) five forces, clearly shows an industry with long-term profitability. The industry, however, has taken a cue from other global markets such as the United States of America in which various companies operate, where petroleum products prices were de-regulated and there was relentless competition in the forecourts. The strategic move towards forecourt convenience retailing can only help the companies and retailers alike to remain afloat should deregulation befall the industry.

1.2. The Research Problem

The mooted liberalisation of the oil industry in South Africa has made a study into the dynamics of the Alternative Profit Centres (APC) or forecourt shops strategic to the oil industry imperative. An analytical review of the key drivers of consumer motivations and attributes that attract customers to the various branded forecourt shops is increasingly pertinent for understanding the future of this sector. Monama (2006, p. 1) declares that the Petroleum Products Amendment Act is aimed at breaking "the vertical integration between the oil companies and the retailers". The Petroleum Products Amendment Act serves to bring the business of filling stations to the previously disadvantaged communities by both location and ownership, through the issuance of licences to both the oil company and the retailer.

According to Boyle (2002) Shell attempted a business format franchising in their forecourts in the United Kingdom (UK) in the 1990s and failed. The public perception of petrol stations in the UK was of unfriendly, cold, greasy and unhygienic places; petrol retailers were not consistent across various locations and over time.

Terblanche (1998) made significant observations that the forecourt convenience shops were bound to cannibalise some conventional convenience shops. He observed that the forecourt convenience shops were generally in highly accessible locations with a combination of services, making them attractive to consumers.

This research will attempt to understand the dynamics of forecourt retailing in South Africa from consumers' responses to specific questions, taking cognisance of the issues raised by both Boyle (2002) and Terblanche (1998), subsequently gaining an understanding of consumers' motivations, perceptions and insights that may aid the growth and profitability of these shops. Triggers of spend per trip, repatronage and brand loyalty, as well as others referred to below, will be probed.

1.3. Relevance of the Research

Competition for forecourt convenience shopping dominance and the rapid growth of this sector provides an interesting study. Underhill (1999) concurs with Terblanche (1998) regarding the ease of availability of convenience stores and their level of convenience. Furthermore, he notes the distinctiveness of convenience stores in the advantage they took of the change in the lives of

women. In the United States people are generally making more shopping trips and buying fewer items in a hurry at a higher price than can be found in supermarkets. Women in South Africa are changing their traditional roles and lifestyles: growth in the numbers of women who work and are independent have necessitated the need for convenience shopping, coupled with other activities such as filling up with petrol.

The South African economy as well as the consumer profile are in a transformational stage. The state's efforts to bring economic benefits to previously disadvantaged sectors of the economy by issuing licences to filling station owners and operators makes the research of this nature relevant to South Africa. Forecourt convenience shops are not regulated by the state, oil companies merely charge royalties for use of their brand names, thus liberating a large number of economic benefits derived from these shops to the retailers.

The exponential growth alluded to by AC Nielsen (2006) and Monama's (2006) assertion that the state intends to break the vertical integration of oil companies in South Africa further strengthens the need for research into this market. AC Nielsen (2006) has forewarned traditional convenience retailers on the impact of forecourt convenience shops on their business model, further widening the audience that needs to understand consumer motivations in this sector. The threat of forecourt convenience shops to other retailers is echoed by Moye and Kincade (2002) who observed that declining sales and increased competition from traditional and non-traditional retailers (such as forecourt convenience shops) forced many shops, specifically small 'mom and pop' shops to shut down.

Based on the theory, literature and observations made elsewhere it would be important to obtain a research-based opinion on the motivations, hygiene and other pull factors applicable to the South African forecourt convenience retailing market.

This research attempts to link psychology theory with marketing theory. Motivation hygiene theory will be used to assess customers' motivations to shop at forecourt convenience stores, while simultaneously probing factors that make customers' experience enjoyable.

The rate of growth in car sales driven by the widening and emergent middle class makes this study even more relevant since it directly relates to the fact that the forecourt convenience market will experience growth into the foreseeable future as more people are able to afford motor vehicles.

1.4. Research Aim

The aim of this research is to understand the influence of brands, demographics, hygiene factors (shop is clean, facilities are visually appealing, shop is secure and safe, shop is bright and well lit and shop has spacious layout), motivators (friendliness and greeting by staff, speedy service, offering latest products in the market, regular communication of specials, products are easy to find, good customer service), Total Customer Experience and price on customers' spend per trip and repatronage intentions. These will be compared and contrasted across the entire forecourt convenience market.

The final aim is to glean from the questionnaire responses the combination of variables defined in the specific research hypotheses which impact on revenue and profitability of the forecourt convenience shops, specifically based on issues of frequency of shopping, motivation to return and shop and spend per trip.

Chapter 2 Theory and Literature Review

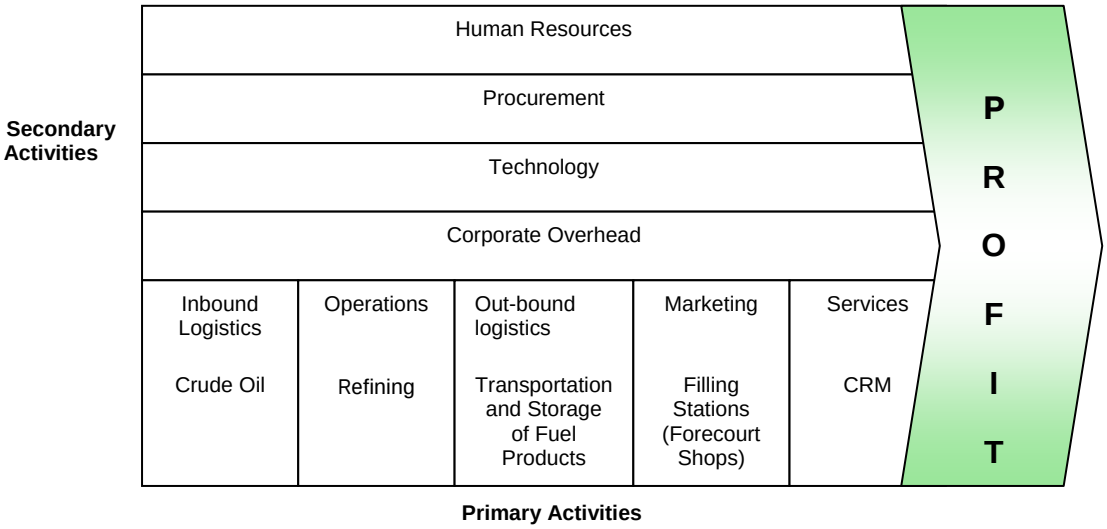
2.0. Background

An extensive search of research pertinent to this particular topic was undertaken; however there is not much write up on this specific topic by many authors with the exception of Boyle (2002), but she focused on the UK market and on one organisation, Shell. Conversely, there is sufficient research undertaken in the areas of retailing in general, specifically on the topics of store image and layout, market orientation, motivations, service-quality, segmentation, brand positioning. Multiple regression and correlations in market research that can be used to analyse data emanating from this research, have sufficient literature basis.

2.1. Competitive Advantage in the Petroleum Sector

With the exception of Sasol and Engen, the rest of the petroleum companies, (BP, Chevron (Caltex), Shell and Total) have a global presence and are vertically integrated through exploration, drilling, refining and retailing activities. Collis and Montgomery (2005) stress the point that a firm's resources leads to creation of competitive advantage in its sphere of competition, based on the consistency between a firm's resources and businesses.

Figure 2 - Petroleum Industry Value Chain



Source: *COMPETITIVE ADVANTAGE: Creating and Sustaining Superior Performance.* By Michael E. Porter (1985)

Petroleum companies have similar primary and secondary activities; however, it is the use and presence of resources that leads to superior profitability. Forecourts are part of the marketing department in all oil companies and they remain a key revenue generator through the sale of petroleum products.

Porter's (1985) Value Chain is depicted in Figure 2 to delineate the firms' activities and gain insights into the scale and scope effects as defined by Collis and Montgomery (2005). Porter's (1985) aim was to divide a firm into the different components in order to understand its potential and existing sources of differentiation. The analysis of the value chain positions forecourt retailing within the marketing activity of the oil companies. Marketing is a primary activity, which is, according to Porter (1985), one of the activities connected with the sale and transfer of the product to the customer. Monama's (2006) view that certain of these activities are ancillary to the core business of oil companies creates an

opportunity for the State to use legislative power to intercept certain non-core items on the Value Chain for fulfilment of broader socio-economic objectives.

Forecourts have for some years been involved with some type of retailing activity to supplement income and lure forecourt patrons. This ranged from unbranded shops to tyres and spares shops. There was hidden treasure in most forecourts, specifically due to the rise of convenience retailing driven by two-income families and the need to purchase goods on the go. Underhill (2000) states that convenience stores made themselves very available and very convenient. He highlights the role of women with fulltime jobs in the growth of the convenience retailing trend. People are making fewer purchases but more frequently, in a hurry. These stores charge more than supermarkets but people are willing to accept the higher prices in exchange for convenience. The convenience proposition became highly viable to oil companies since most filling stations already had the infrastructure which was not being utilised profitably.

The addition of pull factors that would draw people to forecourts where they can quickly buy milk, bread, snacks or cigarettes was a welcome development. By the 1980's, because of rising competition in the petrol retailing environment and the rise in convenience retailing in the United Kingdom, Boyle (2002) points out that oil companies began to diversify into food retailing and converted their filling stations into forecourt convenience shops.

As per Porter's (1985) Value Chain, an additional activity, which would exploit all the firms' resources, was slotted into the marketing section of the primary

activities. This particular development aimed at providing sustainable competitive advantage (SCA). Porter (1985), Morschett, Swoboda and Schramm-Klein (2006) state that the SCA selected by a company; to elevate it from the competition, should be based on specific criteria, but above all be perceived by consumers. They contend that striving for cost leadership in retailing, particularly on the market side of the value chain, leads to minimising investment in store design and ambience and reduced customer service. This is a fundamental challenge to blindly adopting Porter's frameworks without understanding the industry concerned and its applicability to that business. This is particularly important because the oil companies in South Africa are moving fast to re-image their forecourt convenience shops, and these shops are not known for low prices. According to Nielsen (2006) millions are being spent on different forecourt shop formats and layouts and product offerings. The battle for customers through advertising and service improvement, measured by customer first scores and mystery shoppers, shows the seriousness with which the oil companies treat their convenience shops.

It is important to understand whether consumers perceive any value in these stores. Morschett *et al* (2006) highlight the fact that price advantages and quality advantages are not diametrically opposed, but separate factors are only slightly negatively correlated. Convenience is also a central dimension in consumers' retail store perceptions.

2.2. Brands

The role of brands in the context of convenience is critical as consumers are making hurried decisions with little time to fully study products and services in great detail. Soars (2003) defines brands as landmarks or cues with a meaning to customers; with energy and power customers in a stress mode are led to fall back on the brands for comfort. Kotler and Keller (2006) stress the importance and value of brands' ability to make decision making simpler in this rushed environment.

It is imperative to understand all of the branding issues such as brand equity and brand positioning since these are crucial to the firms' ability to maintain superior competitive advantage. Herrmann and Huber (2000) propagate a view that perception and preference of consumers towards a specific brand vis-à-vis competing brands shows the positioning of that brand in the minds of consumers. Newman and Cullen (2002) link sight of brand and advertising to motivation for shopping.

Boyle (2002) highlights the fact that branding aids organisations in obtaining and sustaining a loyal customer base in an inexpensive way whilst achieving the greatest possible return on investment. Semeijn, van Riel and Ambrosini (2004) found that store brands are changing to challenge the manufacturers' brands on quality and price whilst making immense contributions to profitability, store differentiation and loyalty. This is central to this research since most forecourt convenience shops are using their own brand names as opposed to other brands

i.e. Wild Bean at BP as opposed to Star Bucks and Planet Deli at Caltex rather than Subway.

Thang and Tan (2003) state that the stores with a combination of heritage, location and past record of reliability which forms a positive reputation or brand, secure consumers' trust and loyalty, because consumers are psychologically assured of perceived quality or worth. Edvardsson (2005), stresses that organisations create and support brands by placing more emphasis on experiences that engage customers.

2.3. Market Orientation

Organisations which sell products and services must understand who is buying its products (and also why, when, and spending patterns and amounts) and the occasions that lead to the purchases. Kara, Spillan and DeShields (2005) describe market orientation as generating market intelligence through various systems such as decision support systems, marketing information systems and marketing research endeavours. The intelligence must then be distributed widely across company departments. The entire process must result in organisation-wide responsiveness to the changes taking place in the environment. It is further stated that market orientation is assumed to be a prerequisite to success and is profitable for a large number of organisations.

Market orientation as operationalised by Narver and Slater (1990) broadly consists of three behavioural dimensions:

Customer orientation,

Competitor orientation,

Inter-functional coordination.

Conversely, Kara *et al* (2005) view market orientation as consisting of the following dimensions:

Customer orientation and targeting,

Profit orientation,

Integrated marketing.

Perreault and McCarthy (2002) state that integrated marketing is satisfying of customer needs and wants by first satisfying corporate goals through integration of all organisational efforts. This supports the depiction in Figure 2 of forecourt convenience retailing forming part of the marketing activities of oil companies. Corporate goals are satisfied by attracting more people to forecourts by adding features such as car washes and convenience shops to the traditional forecourt, thus ultimately leading to increased fuel sales. Customers are satisfied because their needs and wants are provided for through these additional features to the traditional forecourts.

Narver and Slater (1990) conclude that firms that are market-driven and have a high degree of innovation will outperform their competitors. They further contend that firms that give superior value to their customers will generally have a corporate culture that differentiates them from other firms because of their market orientation. Understanding both current and future customer needs is thus critical as it leads to creation of products and services that satisfy customers.

2.4. Segmentation

The concept and practice of market segmentation as a decision-making tool that can lead to profitability should be carefully scrutinised in the quest to address the research problem. Tynan and Drayton (1987) advance the view that research plays a primary role in validating the methods of subdivision of the total markets. They further contend that segmentation can lead to the marketer differentiating its products.

Yankelovich and Meer (2006) advance the view that segmentation should be diversified into areas such as product innovation, pricing, choice of distribution channels, and not be purely based on advertising. They argue that good segmentations have the ability to pin-point groups that are worth pursuing; for example, people who are underserved, dissatisfied and those who are likely to make their first purchase.

Chandon, Morwitz and Reinartz (2005) conclude that repurchase intentions vary significantly from frequently purchased convenience goods to infrequently purchased durables. Kotler and Keller (2006, p. 240) define a market segment as a “group of consumers who share a similar set of needs and wants” and segmentation is a process of defining those consumers.

Porter (1985, p. 12) emphasises that companies must make a choice between different strategies since “being all things to all people is a recipe for strategic mediocrity and below average performance”. This assertion is aimed at his third generic strategy of focusing on certain target segments. For the purposes of this research, it is critical to understand the attraction of different brands to the different

segments and assess the consumers with the greatest purchase interest towards specific products amongst the brands.

2.5. Motivation Hygiene-Theory

Motivation Hygiene Theory was developed by Herzberg, Mausner and Snyderman in 1959. In this study they concluded that job satisfaction and dissatisfaction should be separated into two different factors. Herzberg (1974) further propagates this view by stating that job related satisfaction and dissatisfaction are produced by different work factors. Factors relating to the content of peoples' jobs make them satisfied, whereas how well (or poorly) people are treated at work make them unhappy or dissatisfied. Satisfiers relate to content and dissatisfiers relate to context. He further proposes that satisfiers are motivators because their presence in abundance in any organisation brings about work motivation in addition to creating positive attitudes of job satisfaction. Dissatisfiers are classified as hygiene factors since they symbolise preventive and environmental conditions.

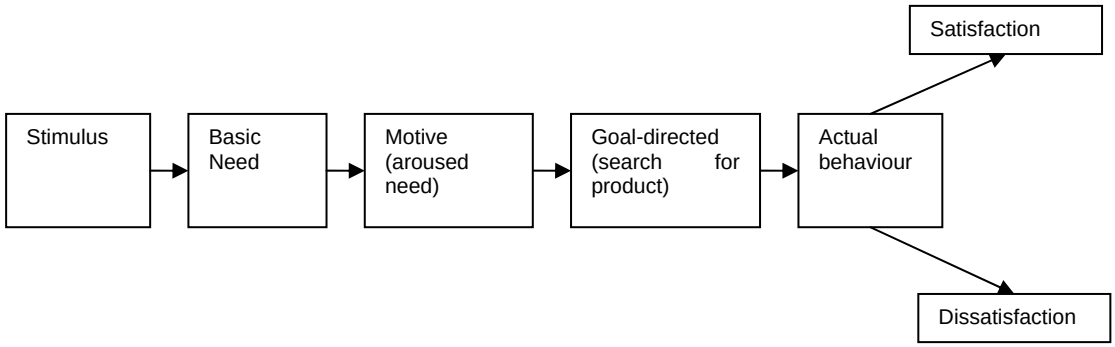
This theory is crucial to this research and has been adapted because consumer motivation is a major theme; conversely, it is crucial to understand the environmental conditions that may prevent people from patronising forecourt convenience shops. For this research, it is critical to understand what constitutes hygiene factors and motivators. Hygiene factors will not make the customer any more satisfied but lack of them will make the customer dissatisfied. In the context of this study visibility, accessibility, safety and security, image, and cleanliness will constitute hygiene factors. Motivators will be the friendliness of staff, product/service offering and perceived quality of service. Brenner, Carmack and

Weinstein (1971) caution on the strict application of satisfiers and dissatisfiers as two distinct factors since what satisfies one person may not necessarily satisfy the next person, and the same analogy applies to dissatisfiers.

Robbins (2005) further emphasises the point that the opposite of “Satisfaction” is “No Satisfaction” and the opposite of “Dissatisfaction” is “No Dissatisfaction”. This theory provides useful insights for marketing since it is easier to assume that Dissatisfaction is the opposite of Satisfaction.

Newman and Cullen (2002) state that peoples’ personalities differ and can influence how they shop, their emotions and general behaviour. They suggest that sight of a brand may trigger the need for a product of that particular brand. Advertising is ranked as a stimulus that leads to motives turning into actions. They further classify motives into psychological and social, driven by rational or emotional needs. They propose a Consumer Motives Model depicted in Figure 3

Figure 3 - Consumer Motives Model



(**Source:** Retailing: Environment & Operations. By Andrew Newman and Peter Cullen (2002))

This model dovetails neatly with the Motivation Hygiene Theory proposed by Herzberg (1974) and reinforces the view that the end result of consumer action leads to either satisfaction or dissatisfaction with their shopping experience or products purchased. It is critical to understand issues and characteristics that lead to satisfaction and dissatisfaction, and manage them appropriately.

Kotler and Keller (2006) relate satisfaction to the customer's perception of the offer's performance in relation to expectations; dissatisfaction arises from the offer's performance falling below expectations. The perceptions that a consumer has of the particular shop either relating to service levels, quality and variety of products must be translated into reality during the shopping experience. If these perceptions are not met or exceeded Newman and Cullen (2002) believe that customers' likelihood of shopping elsewhere is increased.

Terblanche (1998) highlights the fact that consumers shop for many reasons other than buying, and such reasons can be split into personal and social motives. This dissection of motives is important in the context of forecourt convenience retailing since the forecourts primarily supply petroleum products and may have shops with different convenience offerings such as ATMs, Lotto, prepaid electricity or phone cards. The ultimate motives which lead to increased turnover and income generation are worth noting and understanding.

2.6. Service Quality

Kotler and Keller (2006) are of the opinion that if customers' expectations are met or exceeded by the seller's product or service, then the seller has delivered quality.

Edvardsson (2005), states that the basis of perceived service quality may be a product of both cognitive and emotional responses.This departs from Brady and Cronin's (2001) view of service quality as a cognitive evaluation of the service or a service provider. He further points out that positive and negative emotions may lead to positive word-of-mouth and complaining behaviour respectively.

During consumption experiences the emotions that arise therefore are specifically referred to as consumption emotions. Wong (2004) reinforces this view by noting that various emotions can be obtained during the consumption experience. These emotions yield invaluable information on the customers' assessment of the service encounter and ultimately the quality of relationship .

There are various definitions of service concepts by different scholars, but most focus on the customer and Gronroos (2002) reinforces the notion that services are provided as solutions to customer problems. Edvardsson (2005) draws the conclusion that service quality is premised on solutions to customers' problems through certain activities and interactions. He further notes that the most common service characteristics – intangibility, heterogeneity, inseparability and perishability (IHIP) – have always been viewed from the perspective of the service providers. He proposes that customers have a role through participating in the interactions

which will influence both the process quality and outcome quality. This is significant since service quality is no longer relevant to service companies only, but to virtually all places where customers procure goods.

Service quality based on the school of thought (emotions) proposed by Edvardsson and Wong will ultimately lead to satisfaction or dissatisfaction as Wong (2004, p. 366) found that “negative emotions have a stronger effect on satisfaction with quality than positive emotions”.

Gomez, McLaughlin and Wittink (2004) found that consumers may highly value a factor called ‘customer service’ and this may be based on disposition to the cashiers (are they perceived as friendly and polite), speed and accuracy of paying at the till, availability of everyday items and store cleanliness, among other items.

Kumar (2005) highlights a key service attribute on which retailers compete as duration of the waiting time at checkout. Waiting is one of the main complaints about retail encounters, and customers use it as a deciding factor when choosing a place to shop. This is why convenience is coming to the fore in most retail formats as it reduces queuing. Berry, Seiders and Grewal (2002) emphasise that the major assumption in improving the management of the waiting process is that it will improve customer perceptions of service quality, and subsequently increase satisfaction levels and ultimately strengthen the competitive position of the retailer.

2.7. Customer Satisfaction

Kotler and Keller (2006) further note that a customer-centred firm's ultimate goal is not to create high customer satisfaction, although it may seek to create it. There is no point in attempting to obtain 100% customer satisfaction when customers are happy at 60% satisfaction, depending on the nature of the product, service and retailing format. There is a trade-off between increasing high customer satisfaction and profits: for example lowering prices and increasing services. Conversely, profitability may be increased by improving service. The level of expectations raised by the company must be matched by the performance delivered, failing which there will be dissatisfaction from consumers.

Customer satisfaction, according to Hansemark and Albinsson (2004), is crucial and brings many benefits as it leads to retention of customers, loyalty, good word-of-mouth, less price sensitivity and lifetime value. Kotler and Keller (2006) aptly state that high customer satisfaction does not only create rational preference, but also an emotional attachment with the brand or the company.

Seiders, Voss, Grewal and Godfrey (2005) state that a satisfied customer's ability to fulfil their intent is facilitated by convenience, which is a market characteristic that saves time. They further caution against reliance on satisfaction scores as a predictor of repurchase behaviour. It can, however, be inferred that an ongoing customer is a sign that the customer is satisfied, if not delighted. Jones and Reynolds (2006), on the other hand, highlight the fact that even satisfied customers at times do switch brands and retailers, owing to boredom. They,

however, support the notion that satisfaction is a crucial measure of store performance and a good predictor of repatronage intentions.

Arnold and Reynolds (2003) reveal that retailers are not only attempting to satisfy shoppers' basic needs, but also to entertain them by engaging them, consequently keeping them interested in their stores. The role of retailers has evolved from basic needs to a more hedonistic focus. The researcher has noted certain forecourt convenience shops that have competitions with significant prizes such as motor cars. These competitions increase the chances of repatronage and prevent boredom, as earlier discussed.

Gomez *et al.* (2004) stress the importance of understanding the impact of customer satisfaction on store revenues and the establishment of the links between customer satisfaction and sales performance. There is more to visiting a forecourt convenience shop than mere purchasing of goods for consumption, especially when a variety of goods and services are offered simultaneously, e.g. petrol and bread. The customer experiences differences in different forecourt shops (ambience and service level) which become as important as the physical characteristics of the goods offered (price and quality). They state that the elasticity of repurchase intentions based on customer satisfaction in the supermarket industry is reported to be one of the highest among all retail sectors in the United States. Unsatisfied customers are further encouraged to switch because of the proliferation of supermarkets and competing retailers which lead to low switching costs. It is critical to prevent an unsatisfactory experience by first understanding the links between customer satisfaction drivers and sales performance.

Gomez *et al.* (2004) state that other relevant factors will have an impact on customer satisfaction. In addition to customer service, these include the store ambiance, perceived product quality of perishables such as deli/bakery and the perceived value of products relative to price.

Szymanski and Henard (2001) state that the consequences of satisfied or dissatisfied customers have not received sufficient attention from researchers. This is contrary to research on antecedents of satisfied customers, specifically disconfirmation, where some standard of performance is used by consumers to compare against their perceptions of actual service performance. It is critical to understand and evaluate the financial value of satisfaction based on the effect of satisfaction on repatronage and subsequent impact on market share.

The end product of customer satisfaction is customer loyalty which is clearly encapsulated by Wallace, Giese and Johnson (2004) as generating numerous benefits. They further state that there is a strong link between loyalty and profitability based on the fact that loyal customers buy more, are willing to pay higher prices, and generate positive word of mouth. Customer loyalty includes both loyalties to the retailer and to the brand.

2.8. Total Customer Experience

Value creation for customers according to Berry, Carbone and Haeckel (2002) must be created in the form of experiences, by having good insights into the customer's journey – beginning with their expectations before the experience up to and including the likely assessments they may make once the journey is over.

According to Courtney and Hoch (2006) for every 100 American shoppers, 64 people will be told about a store's poor products or services. Those people will not set foot in that store regardless of what the store may do to entice them. They further state that customers who have had a problem will be happy to tell their friends in an extremely powerful way, but will not bother to tell the company concerned. They advise businesses to invest in ensuring that each customer experience is first class, from clear visibility from the road, easy access, adequate parking, trained front-line staff, good spacious layout and the right product mix.

Berry (2001) re-emphasises the point that today's shoppers want total customer experience, which he refers to as five pillars, namely:

Exceptional solutions to their needs,

Respect,

An emotional connection,

Fair prices,

Convenience.

He further argues that these must be offered in their totality without omitting any one pillar.

Morschett, Swoboda and Foscht (2005) warn that consumers' perceptions and not objective reality guide and form shopping behaviour. The consumer internally processes the store and its characteristics, consequently leading to a short-term perception that forms the foundation for long-term attitudes towards the retailer.

Kaltcheva and Weitz (2006) state that shopper behaviour variables such as unplanned spending, duration of the store visit and social interaction are positively affected by a pleasant shopping environment.

2.9. Conclusion of the Literature Review

The literature has highlighted various drivers of motivation in various set ups. Different schools of thought regarding what attracts customers and what helps to retain them and motivate their repurchase intentions were explored. The literature clearly spells out the business drivers from a strategic perspective and human drivers from psychological and marketing perspectives, subsequently setting the stage for the next phase of the research. The literature facilitated the integration of various theories into various but specific research hypotheses which were initially based on the researcher's observations and perceptions.

Chapter 3 Specific Research Hypotheses

3.0. Hypotheses to be tested for validity:

3.1. Hypothesis 1

(Brands - Petrol)

Null Hypothesis (H_o): Petrol brands play no role in consumer motivation to shop at forecourt convenience shops.

Alternate Hypothesis (H_a): Petrol brands play a role in consumer motivation to shop at forecourt convenience shops.

3.2. Hypothesis 2

(Brands - Shops)

H_o: Shop brands play no role in consumer motivation to shop at forecourt convenience shops.

H_a: Shop brands play a role in consumer motivation to shop at forecourt convenience shops.

3.3. Hypothesis 3

(Demographics - Age)

H_o: Age plays no role on products purchased, frequency of shopping and spend per trip at forecourt convenience shops.

H_a: Age plays a role on products purchased, frequency of shopping and spend per trip at forecourt convenience shops.

3.4. Hypothesis 4

(Demographics - Gender)

H_o: Gender plays no role in products purchased, frequency of shopping and spend per trip at forecourt convenience shops.

H_a: Gender plays a role in products purchased, frequency of shopping and spend per trip at forecourt convenience shops.

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3.5. Hypothesis 5

(Demographics - Race)

H_o: Race plays no role in products purchased, frequency of shopping and spend per trip at forecourt convenience shops.

H_a: Race plays a role in products, purchased frequency of shopping and spend per trip at forecourt convenience shops.

3.6. Hypothesis 6

(Hygiene Factors and Motivators – Spend per Trip)

H_o: Hygiene factors and motivators play no role on amount spent per trip.

H_a: Hygiene factors and motivators play a role on amount spent per trip.

3.7. Hypothesis 7

(Hygiene Factors and Motivators – Repatronage Intention)

H_o: Hygiene factors and motivators play no role on repatronage intention.

H_a: Hygiene factors and motivators play a role on repatronage intention**.**

3.8. Hypothesis 8

(Total Customer Experience – Spend per Trip)

H_o: Total Customer Experience plays no role on amount spent per trip.

H_a: Total Customer Experience plays a role on amount spent per trip.

3.9. Hypothesis 9

(Total Customer Experience – Frequency of Shopping)

H_o: Total Customer Experience plays no role on frequency of shopping.

H_a: Total Customer Experience plays a role on frequency of shopping.

3.10. Hypothesis 10

(Price - Repatronage)

H_o: Price plays no role in consumer intention to come back for shopping.

H_a: Price plays a role in consumer intention to come back for shopping.

3.11. Hypothesis 11

(Hygiene Factors - Repatronage)

H_o: Hygiene factors play no role in consumer intention to come back to shop.

H_a: Hygiene factors play a role in consumer intention to come back to shop.

Chapter 4 Research Methodology

4.0. Research Design

Experimental research, as described fully by Welman and Kruger (2005), where participants are subjected to a face-to-face questionnaire survey was undertaken. The questionnaire was designed based on specifications advocated by Bearden and Netemeyer (1999). The aim of the questionnaire was to observe the effect of the stated hypotheses of the dependent variable by the independent variable. Secondary data from a marketing research company, AC Nielsen, was used to contribute information about the needs of the market in this exploratory research, and to further establish the kinds of people in the forecourt convenience retailing market as per Wright and Crimp (2000). The research was designed to use a primary source which is defined by Welman and Kruger (2005) as an account, oral or written, from a direct witness or a participant in an event.

4.1. Population of Relevance

The population of relevance is all the consumers of forecourt convenience shops in South Africa. Logistical and resource constraints make the analysis of the entire South African population by the researcher impossible. Total declined to participate in this survey. The sample was chosen because it is a convenient sample, based on the top forecourt convenience shops by turnover per brand and four surrounding forecourt convenience sites, yielding a total of 20 sites. The survey was done during the first week of the month, the second week and the last week on different days of the week and at different times. This was done to

eliminate time, day and week bias. It was carried out in different micro markets which further reduced sampling bias.

4.2. Size and Nature of the Sample

The size of the sample was 5 people per forecourt convenience shop with a total sample size of 115 from the 20 sites after all the data were assessed for correctness and completeness. The sample is a stratified probability sample as described by Welman and Kruger (2005).

4.3. Data Collection

The data to be used was primary data from the market survey in Gauteng based on the questionnaire attached in Appendix 1. The questionnaire was designed to answer the hypotheses explained in chapter 3.

This approach was pursued based on the observations of Welman and Kruger (2005, p. 48) that “the sample should be representative of the sampling frame, which ideally is the same as the population, but which often differs due to practical problems relating to the availability of information”. The sample has statistical validity (115) and relevance according to Albright, Winston and Zappe (2003) - this sample was used as an attempt to mirror forecourt convenience patrons at different shops, times and location. This will aid the researcher towards valid and representative conclusions that will assist in the completeness of the proposed research.

4.4. Data Analysis

The sample was analysed with different statistical techniques briefly mentioned hereunder:

4.4.1. Multiple Regression

Albright, Winston and Zappe (2003, p. 548) define regression as a "study of the relationship between variables". It is a useful tool in business since its application covers a variety of situations. Conversely, multiple regression includes more explanatory variables in the regression equation. Keller and Warrack (2003) state that generally preference is for inclusion of as many independent variables as possible that are believed to affect the dependent variable. For the proposed research, all the elements of Market Orientation – location, accessibility, brand position - are independent variables, whereas the number of times people visit the brand shops and a particular brand shop are dependent variables and are affected by the independent variables.

4.4.2. Analysis of Variance

Keller and Warrack (2003) broadly define analysis of variance as a technique that checks whether there is a difference in means between different population groups (segments) in a study. This method is critical in evaluating many research hypotheses which are stated in the relevant section of this paper.

4.4.3. Correlations

Correlations indicate a relationship between two variables, typically observed on a scatterplot. Albright, Winston and Zappe (2003) further explain that correlation measures the strength and direction of a linear relationship between two variables. If the plots fit tightly around a trend line then the relationship is strong. Positive and negative relationships are respectively depicted by a straight line rising from left to right and a straight line falling from left to right.

4.4.4. Chi-Squared Tests

These tests are used in situations where a population is categorised in two ways or in a contingency table. The aim is to determine whether the two classifications of the population of nominal data are statistically independent. This is based on the interpretations of Keller and Warrack (2003) and Albright, Winston and Zappe (2003).

4.5. Potential limitations

The potential limitations of this research are:

It is based on a restricted geographic area and the prospective respondents on a particular day may not be representative of the general population profile.

The questions may be interpreted incorrectly by different people.

People may give answers just for the sake of “get it over and done with” consequently leading to insincere answers.

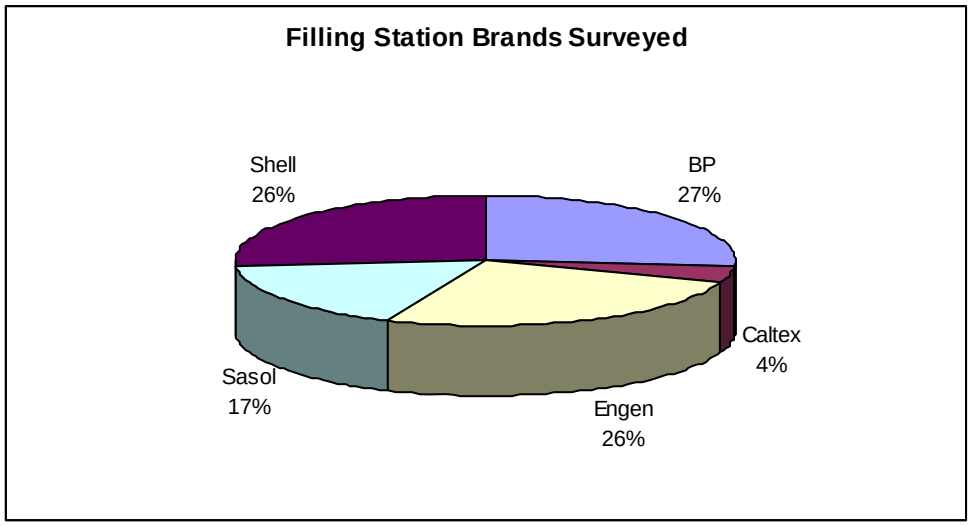
Limitations were mitigated by using different times of the day and week and different weeks. Respondents were chosen randomly after shopping.

Chapter 5 Results

5.0. Survey Responses

The survey was undertaken in various areas of Gauteng and the fuel brands that participated are pictorially depicted below:

Figure 4 - Filling Station Brands



The number of people interviewed for this survey is 115; 27% of them were interviewed at a BP Express, 26% at a Shell Select, 26% at Engen Quick Shop, 17% at a Sasol Delight and 4% at a Caltex Star Mart. Total Oil declined to form part of this research.

Figure 5 - Site Location

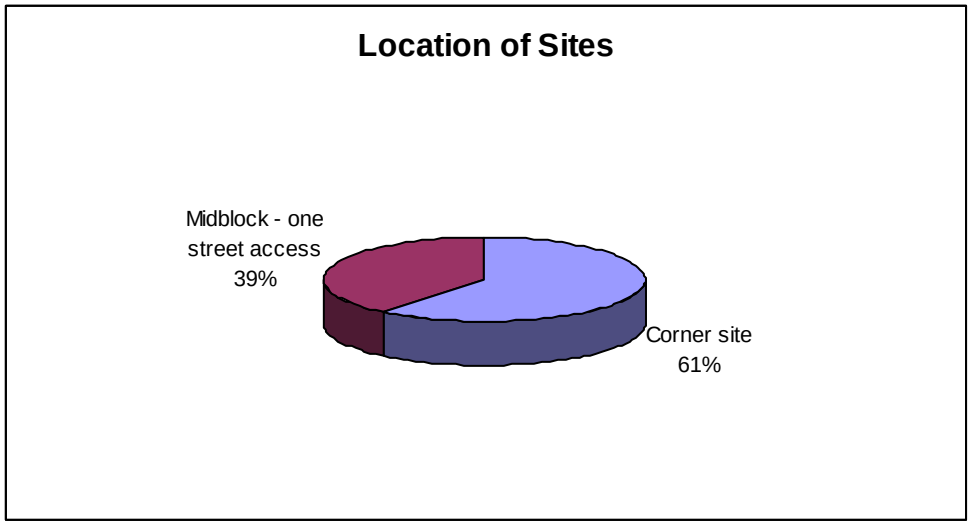
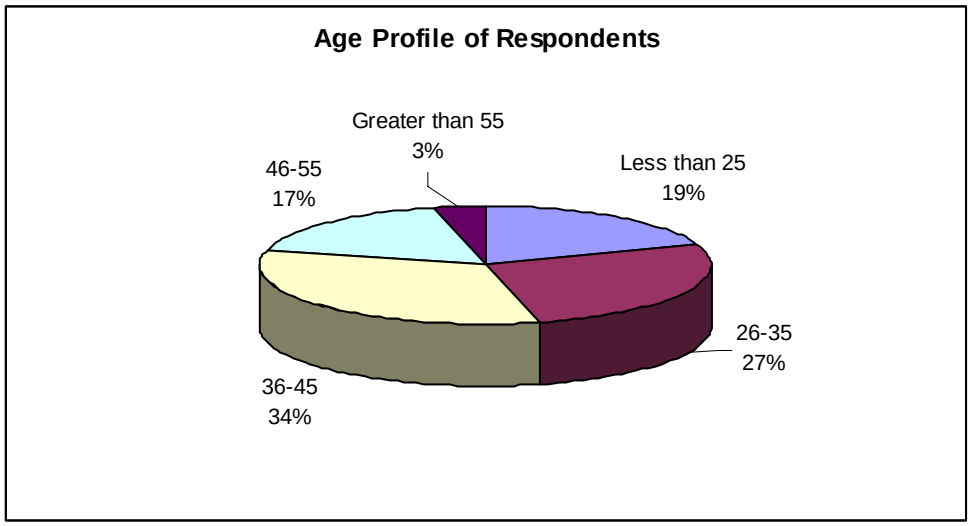


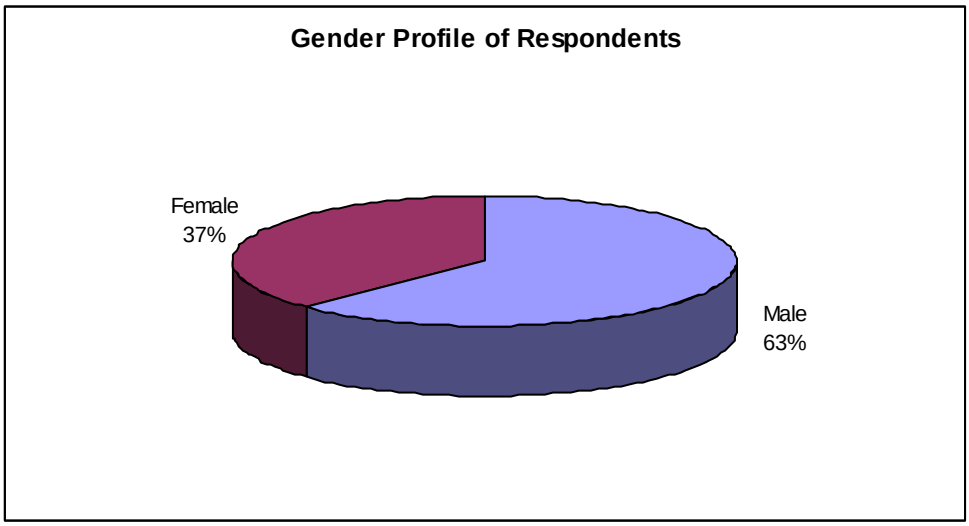
Figure 5 depicts site location for the interviews: 61% of respondents were interviewed from corner sites which are deemed to be more valuable to oil companies. Conversely 39% of the respondents were interviewed from midblock sites with access from only one street.

Figure 6 - Age Profile of Respondents



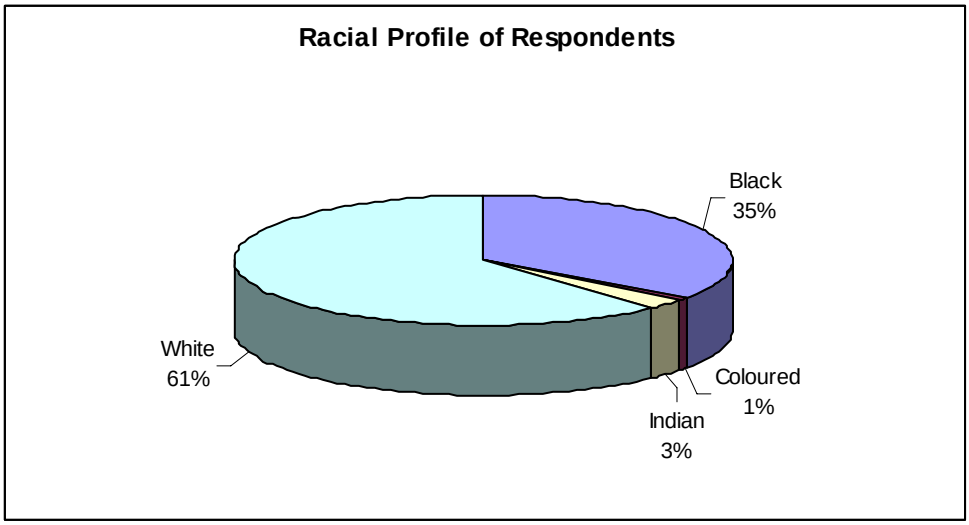
The age group of 36-45 was represented by 34% of the respondents, followed by 26-35 represented by 27% of the respondents. Thereafter Less than 25 was represented by 19% of the respondents, then 46-55 represented by 17% of the respondents and finally Greater than 55 represented by 3% of the respondents.

Figure 7 - Gender Profile of Respondents



Male respondents represented 63% of the sample whilst females constituted the remaining 37%.

Figure 8 - Racial Profile of Respondents



White people constituted 61% of the sample followed by Black people at 35%, Indians at 3% and Coloured people at 1%. The low numbers of Coloureds and Indians led to the researcher consolidating them under Black people for the purposes of statistical analysis described fully in Chapter 6.

Table 1 - Descriptive Statistics of Total Sample

Descriptive Statistics					
Statements	**N**	**Minimum**	**Maximum**	**Mean**	**Std. Deviation**
Close to home	115	1	5	2.23	1.71
Close to work	115	1	5	3.37	1.82
Shop visible from main road	115	1	5	1.31	1.04
Easy drive into from main road	115	1	5	1.53	1.17
Easy drive back onto main road	115	1	5	1.58	1.23
Lots of parking	115	1	5	1.54	1.05
Shop when buying petrol	115	1	5	2.58	1.86
Shop because petrol brand of choice	115	1	5	2.94	1.84
Shop because shop brand of choice	115	1	5	1.71	1.40
Brand has cleaner fuels	115	1	5	2.83	1.32
Brand makes difference	115	1	5	3.20	1.80
Major brands of petrol are different	115	1	5	3.13	1.63
Visit shop for ATM	115	1	5	3.57	1.88
Visit shop for bread and rolls	115	1	5	3.70	1.83
Within walking distance	115	1	5	3.77	1.83
Shop here only in emergencies	115	1	5	4.06	1.60
Shop when supermarkets closed	115	1	5	4.75	0.91
Shop when all other shops are closed	115	1	5	4.74	0.94
Shop here on weekends	115	1	5	1.20	0.75
Shop caters for all product/service needs	115	1	5	1.21	0.77
Shop here on public holidays	115	1	5	1.50	1.24
Shop when only have few items to buy	115	1	5	1.38	0.98
Shop is cheap	115	1	5	3.57	1.12
Shop here when rushed for time	115	1	5	2.44	1.72
Secure and safe	115	1	5	1.10	0.50
Gas bottle refill	115	1	5	4.47	1.32
Shop has good customer service	115	1	5	1.04	0.24
Forecourt has good customer service	115	1	5	1.27	0.74
Shop is clean	115	1	5	1.03	0.23
Speedy service	115	1	5	1.26	0.85
Shop is bright and well lit	115	1	5	1.03	0.26
Facilities are visually appealing	115	1	5	1.12	0.53
Prices are lower than surrounding shops	115	1	5	3.83	1.10
Regular communication of specials	115	1	5	3.78	1.69
Spacious layout	115	1	5	1.19	0.69
Offers latest products in the market	115	1	5	1.37	0.90
Products are easy to find	115	1	5	1.17	0.67
Shop staff is friendly and greets	115	1	5	1.23	0.71

Descriptive Statistics					
Statements	**N**	**Minimum**	**Maximum**	**Mean**	**Std. Deviation**
Pleased with overall service	115	1	5	1.14	0.46
Shopping here is delightful experience	115	1	5	1.17	0.57
Completely satisfied with shopping experience	115	1	5	1.15	0.58
Will definitely come back to shop	115	1	5	1.08	0.48
Once or more a week	115	0	1	0.77	0.42
Two or three times a month	115	0	2	0.24	0.66
Once or less a month	115	0	3	0.31	0.92
Once or more a week	115	0	1	0.77	0.42
Two or three times a month	115	0	2	0.03	0.26
Once or less a month	115	0	3	0.10	0.55
Amount spent	115	0	200	8.15	24.57

5.1. Hypothesis 1

The results of the statistical analysis are shown in Tables 2 - 4.

Table 2 - Model Summary of Hypothesis 1

Model Summary				
Model	**R**	**R Square**	**Adjusted R Square**	**Std. Error of the Estimate**
1	.301(a)	0.091	0.083	0.62608

a. Predictors: (Constant), Within walking distance

Table 3 - Analysis of Variance for Hypothesis 1

ANOVA(b)						
Model		**Sum of Squares**	**df**	**Mean Square**	**F**	**Sig.**
1	Regression	4.389	1	4.389	11.196	.001(a)
	Residual	43.901	112	0.392		
	Total	48.289	113			

a. Predictors: (Constant), Within walking distance

b. Dependent Variable: Freqbrand

Table 4 - Coefficients for Hypothesis 1

Coefficients(a)						
Model		**Unstandardised Coefficients**		**Standardised Coefficients**	**t**	**Sig.**
		B	**Std. Error**	**Beta**		
1	(Constant)	0.517	0.134		3.853	0.000
	Within walking distance	0.108	0.032	0.301	3.346	0.001

a. Dependent Variable: Freqbrand

5.2. Hypothesis 2

The results of the statistical analysis are shown in Tables 5 - 7.

Table 5 - Model Summary of Hypothesis 2

Model Summary				
Model	**R**	**R Square**	**Adjusted R Square**	**Std. Error of the Estimate**
1	.567(a)	0.32	0.32	0.55
2	.627(b)	0.39	0.38	0.52
3	.675(c)	0.45	0.44	0.49
4	.694(d)	0.48	0.46	0.48
5	.707(e)	0.50	0.48	0.48
6	.721(f)	0.52	0.49	0.47
7	.735(g)	0.54	0.51	0.46
8	.747(h)	0.56	0.52	0.46

a. Predictors: (Constant), Shop here only in emergencies
b. Predictors: (Constant), Shop here only in emergencies, Shop because shop brand of choice
c. Predictors: (Constant), Shop here only in emergencies, Shop because shop brand of choice, Pleased with overall service
d. Predictors: (Constant), Shop here only in emergencies, Shop because shop brand of choice, Pleased with overall service, Completely satisfied with shopping experience
e. Predictors: (Constant), Shop here only in emergencies, Shop because shop brand of choice, Pleased with overall service, Completely satisfied with shopping experience, Shop is clean
f. Predictors: (Constant), Shop here only in emergencies, Shop because shop brand of choice, Pleased with overall service, Completely satisfied with shopping experience, Shop is clean, Close to home
g. Predictors: (Constant), Shop here only in emergencies, Shop because shop brand of choice, Pleased with overall service, Completely satisfied with shopping experience, Shop is clean, Close to home, Visit shop for bread and rolls
h. Predictors: (Constant), Shop here only in emergencies, Shop because shop brand of choice, Pleased with overall service, Completely satisfied with shopping experience, Shop is clean, Close to home, Visit shop for bread and rolls, Shop caters for all product/service needs

Table 6 - Analysis of Variance for Hypothesis 2

ANOVA(i)						
Model		**Sum of Squares**	**Df**	**Mean Square**	**F**	**Sig.**
8	Regression	27.50	8.00	3.44	16.54	.000(h)
	Residual	21.83	105.00	0.21		
	Total	49.33	113.00			

h. Predictors: (Constant), Shop here only in emergencies, Shop because shop brand of choice, Pleased with overall service, Completely satisfied with shopping experience, Shop is clean, Close to home, Visit shop for bread and rolls, Shop caters for all product/service needs
i. Dependent Variable: Frequency buy at this shop

Table 7 - Coefficients for Hypothesis 2

Coefficients(a)						
Model	**Statements**	**Unstandardised Coefficients**		**Standardised Coefficients**	**t**	**Sig.**
		B	**Std. Error**	**Beta**		
8	(Constant)	1.48	0.33		4.49	0.00
	Shop here only in emergencies	-0.19	0.03	-0.45	-5.98	0.00
	Shop because shop brand of choice	0.11	0.03	0.23	3.22	0.00
	Pleased with overall service	0.81	0.15	0.56	5.43	0.00
	Completely satisfied with shopping experience	-0.49	0.13	-0.44	-3.73	0.00
	Shop is clean	-0.49	0.20	-0.17	-2.48	0.01
	Close to home	0.07	0.03	0.18	2.62	0.01
	Visit shop for bread and rolls	0.06	0.03	0.18	2.52	0.01
	Shop caters for all product/service needs	0.14	0.07	0.17	2.04	0.04

a. Dependent Variable: Frequency buy at this shop

5.3. Hypothesis 3

This section is based on demographic information and Section E of the questionnaire. The profiles by age, gender and race are fully described earlier and presented by Figure 6. The results of the statistical analyses are shown in Tables 8 – 9.

Table 8 - Descriptive Statistics for Hypothesis 3 (Age)

Descriptive Statistics for Age									
		N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
						Lower Bound	Upper Bound		
Amount spent	Less than 25	22	3.50	1.95	0.41	2.64	4.36	1	6
	26-35	31	3.74	1.63	0.29	3.14	4.34	1	6
	36-45	38	3.29	1.92	0.31	2.66	3.92	0	6
	46-55	20	3.35	1.81	0.41	2.50	4.20	1	6
	Greater than 55	4	3.00	2.16	1.08	-0.44	6.44	1	6
	Total	115	3.45	1.82	0.17	3.12	3.79	0	6
Frequency buy at this shop	Less than 25	22	1.23	0.61	0.13	0.96	1.50	1	3
	26-35	31	1.19	0.54	0.10	0.99	1.39	1	3
	36-45	38	1.47	0.76	0.12	1.22	1.72	1	3
	46-55	20	1.40	0.68	0.15	1.08	1.72	1	3
	Greater than 55	4	1.25	0.50	0.25	0.45	2.05	1	2
	Total	115	1.33	0.66	0.06	1.21	1.45	1	3
Items Intended	Less than 25	22	2.45	2.06	0.44	1.54	3.37	1	8
	26-35	30	2.30	1.70	0.31	1.66	2.94	0	7
	36-45	38	1.71	1.41	0.23	1.25	2.17	0	8
	46-55	20	1.55	1.15	0.26	1.01	2.09	0	4
	Greater than 55	4	2.00	0.82	0.41	0.70	3.30	1	3
	Total	114	1.99	1.60	0.15	1.69	2.29	0	8
Items Bought	Less than 25	22	1.05	0.72	0.15	0.73	1.37	0	3
	26-35	31	1.06	0.77	0.14	0.78	1.35	0	3
	36-45	38	1.29	0.90	0.15	0.99	1.58	0	5
	46-55	20	1.25	0.91	0.20	0.82	1.68	0	4
	Greater than 55	4	1.75	0.96	0.48	0.23	3.27	1	3
	Total	115	1.19	0.84	0.08	1.04	1.35	0	5

Table 9 - Analysis of Variance for Hypothesis 3 (Age)

ANOVA (Age)						
		Sum of Squares	df	Mean Square	F	Sig.
Amount spent	Between Groups	4.686	4	1.171	0.347	0.846
	Within Groups	371.801	110	3.380		
	Total	376.487	114			
Frequency buy at this shop	Between Groups	1.717	4	0.429	0.990	0.416
	Within Groups	47.726	110	0.434		
	Total	49.443	114			
Items Intended	Between Groups	14.471	4	3.618	1.436	0.227
	Within Groups	274.520	109	2.519		
	Total	288.991	113			
Items Bought	Between Groups	2.650	4	0.663	0.945	0.441
	Within Groups	77.141	110	0.701		
	Total	79.791	114			

5.4. Hypothesis 4

This section is based on demographic information and Section E of the questionnaire. The profiles by age, gender and race are fully described earlier and presented by Figure 7. The results of the statistical analyses are shown in Tables 10 – 11.

Table 10 - Descriptive Statistics for Hypothesis 4 (Gender)

Descriptive Statistics for Gender					
	Gender	N	Mean	Std. Deviation	Std. Error Mean
Amount spent	Male	72	3.42	1.80	0.21
	Female	43	3.51	1.87	0.29
Frequency buy at this shop	Male	72	1.32	0.65	0.08
	Female	43	1.35	0.69	0.10
Items Intended	Male	71	2.06	1.46	0.17
	Female	43	1.88	1.82	0.28
Items Bought	Male	72	1.33	0.89	0.10
	Female	43	0.95	0.69	0.10
Buying Over Intention	Male	71	-0.70	1.70	0.20
	Female	43	-0.93	1.89	0.29

Table 11 - Independent Samples Test for Hypothesis 4 (Gender)

Independent Samples Test for Gender										
		Levene's Test for Equality of Variances		t-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
									Lower	Upper
Amount spent	Equal variances assumed	0.121	0.729	-0.270	113	0.788	-0.095	0.352	-0.792	0.602
	Equal variances not assumed			-0.267	85.748	0.790	-0.095	0.355	-0.801	0.611
Frequency buy at this shop	Equal variances assumed	0.234	0.630	-0.231	113	0.818	-0.02939	0.12746	-0.28191	0.22312
	Equal variances not assumed			-0.227	84.306	0.821	-0.02939	0.12941	-0.28672	0.22793
Items Intended	Equal variances assumed	1.033	0.312	0.557	112	0.579	0.17262	0.30997	-0.44155	0.78679
	Equal variances not assumed			0.528	74.601	0.599	0.17262	0.32677	-0.47840	0.82364
Items Bought	Equal variances assumed	5.349	0.023	2.405	113	0.018	0.37984	0.15796	0.06690	0.69279
	Equal variances not assumed			2.562	105.389	0.012	0.37984	0.14825	0.08591	0.67378
Buying Over Intention	Equal variances assumed	0.209	0.648	0.658	112	0.512	0.22601	0.34334	-0.45428	0.90629
	Equal variances not assumed			0.641	81.414	0.523	0.22601	0.35256	-0.47542	0.92743

5.5. Hypothesis 5

This section is based on demographic information and Section E of the questionnaire. The profiles by age, gender and race are fully described earlier and presented by Figure 8. The results of the statistical analyses are shown in Tables 12 – 15.

Table 12 - Descriptive Statistics for Hypothesis 5 (Race)

Descriptive Statistics for Race									
		N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
						Lower Bound	Upper Bound		
Amount spent	Black	40	3.60	1.72	0.27	3.05	4.15	1	6
	Coloured	1	6.00	.	.	.	.	6	6
	Indian	3	5.33	1.15	0.67	2.46	8.20	4	6
	White	71	3.25	1.84	0.22	2.82	3.69	0	6
	Total	115	3.45	1.82	0.17	3.12	3.79	0	6
Frequency buy at this shop	Black	40	1.10	0.38	0.06	0.98	1.22	1	3
	Coloured	1	1.00	.	.	.	.	1	1
	Indian	3	1.00	0.00	0.00	1.00	1.00	1	1
	White	71	1.48	0.75	0.09	1.30	1.66	1	3
	Total	115	1.33	0.66	0.06	1.21	1.45	1	3
Items Intended	Black	39	2.33	1.75	0.28	1.77	2.90	1	8
	Coloured	1	2.00	.	.	.	.	2	2
	Indian	3	2.67	2.52	1.45	-3.58	8.92	0	5
	White	71	1.77	1.47	0.17	1.43	2.12	0	8
	Total	114	1.99	1.60	0.15	1.69	2.29	0	8
Items Bought	Black	40	1.15	0.77	0.12	0.90	1.40	0	3
	Coloured	1	0.00	.	.	.	.	0	0
	Indian	3	2.33	1.53	0.88	-1.46	6.13	1	4
	White	71	1.18	0.82	0.10	0.99	1.38	0	5
	Total	115	1.19	0.84	0.08	1.04	1.35	0	5

Table 13 - Consolidated Descriptive Statistics for Hypothesis 5 (Race)

Consolidated Descriptive Statistics for Race					
	Race2	**N**	**Mean**	**Std. Deviation**	**Std. Error Mean**
Amount spent	Black (non white)	44	3.77	1.75	0.26
	White	71	3.25	1.84	0.22
Frequency buy at this shop	Black (non white)	44	1.09	0.36	0.05
	White	71	1.48	0.75	0.09
ItemsIntended	Black (non white)	43	2.35	1.76	0.27
	White	71	1.77	1.47	0.17
ItemsBought	Black (non white)	44	1.20	0.88	0.13
	White	71	1.18	0.82	0.10
BuyingOverIntention	Black (non white)	43	-1.12	2.04	0.31
	White	71	-0.59	1.57	0.19

Due to the low numbers of Indians and Coloureds, they were consolidated into Black (Non-white) for ease of analysis.

Table 14 - Analysis of Variance Hypothesis 5 (Race)

ANOVA for Race						
		Sum of Squares	**df**	**Mean Square**	**F**	**Sig.**
Amount spent	Between Groups	20.78	3	6.93	2.16	0.10
	Within Groups	355.70	111	3.20		
	Total	376.49	114			
Frequency buy at this shop	Between Groups	4.13	3	1.38	3.37	0.02
	Within Groups	45.32	111	0.41		
	Total	49.44	114			
Items Intended	Between Groups	9.26	3	3.09	1.21	0.31
	Within Groups	279.73	110	2.54		
	Total	288.99	113			
Items Bought	Between Groups	5.40	3	1.80	2.69	0.05
	Within Groups	74.39	111	0.67		
	Total	79.79	114			

Table 15 - Independent Samples Test for Hypothesis 5 (Race)

Independent Samples Test for Race										
		Levene's Test for Equality of Variances		t-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
									Lower	Upper
Amount spent	Equal variances assumed	0.46	0.50	1.50	113.00	0.14	0.52	0.35	-0.17	1.21
	Equal variances not assumed			1.52	94.83	0.13	0.52	0.34	-0.16	1.20
Frequency buy at this shop	Equal variances assumed	48.97	0.00	-3.19	113.00	0.00	-0.39	0.12	-0.63	-0.15
	Equal variances not assumed			-3.70	107.58	0.00	-0.39	0.10	-0.60	-0.18
Items Intended	Equal variances assumed	2.86	0.09	1.88	112.00	0.06	0.57	0.31	-0.03	1.18
	Equal variances not assumed			1.80	76.67	0.08	0.57	0.32	-0.06	1.21
Items Bought	Equal variances assumed	0.56	0.45	0.13	113.00	0.89	0.02	0.16	-0.30	0.34
	Equal variances not assumed			0.13	86.18	0.90	0.02	0.16	-0.30	0.35
Buying Over Intention	Equal variances assumed	4.11	0.04	-1.54	112.00	0.13	-0.52	0.34	-1.20	0.15
	Equal variances not assumed			-1.45	72.14	0.15	-0.52	0.36	-1.25	0.20

5.6. Hypothesis 6

The results of the statistical analyses are represented by Tables 16 – 18.

Table 16 - Model Summary for Hypothesis 6

Model Summary				
Model	**R**	**R Square**	**Adjusted R Square**	**Std. Error of the Estimate**
1	.311(a)	0.097	-0.030	1.844

Table 17 - Analysis of Variance for Hypothesis 6

ANOVA(b)						
Model		**Sum of Squares**	**df**	**Mean Square**	**F**	**Sig.**
1	Regression	36.36	14	2.60	0.76	.705(a)
	Residual	340.13	100	3.40		
	Total	376.49	114			

a. Predictors: (Constant),

Forecourt staff is friendly and greets,
Prices are lower than surrounding shops,
Shop is clean,
Speedy service,
Facilities are visually appealing,
Offers latest products in the market,
Secure and safe,
Regular communication of specials,
Products are easy to find,
Shop has good customer service,
Shop staff is friendly and greets,
Forecourt has good customer service,
Shop is bright and well lit,
Spacious layout

b. Dependent Variable: Amount spent

Table 18 - Coefficients for Hypothesis 6

Coefficients(a)						
Model		Unstandardised Coefficients		Standardised Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	3.91	1.42		2.74	0.01
	Secure and safe	0.30	0.46	0.08	0.66	0.51
	Shop has good customer service	0.23	0.94	0.03	0.25	0.80
	Forecourt has good customer service	0.55	0.36	0.23	1.54	0.13
	Shop is clean	-1.35	1.13	-0.17	-1.19	0.24
	Speedy service	0.49	0.26	0.23	1.86	0.07
	Shop is bright and well lit	0.01	1.13	0.00	0.01	0.99
	Facilities are visually appealing	-0.10	0.43	-0.03	-0.24	0.81
	Prices are lower than surrounding shops	0.12	0.17	0.07	0.72	0.47
	Regular communication of specials	-0.14	0.11	-0.13	-1.24	0.22
	Spacious layout	0.01	0.43	0.00	0.03	0.98
	Offers latest products in the market	0.09	0.22	0.05	0.42	0.68
	Products are easy to find	-0.27	0.35	-0.10	-0.79	0.43
	Shop staff is friendly and greets	-0.16	0.37	-0.06	-0.43	0.66
	Forecourt staff is friendly and greets	-0.31	0.32	-0.14	-0.96	0.34

a. Dependent Variable: Amount spent

5.7. Hypothesis 7

The results of the statistical analyses are represented by Tables 19 – 21.

Table 19 - Model Summary for Hypothesis 7

Model Summary				
Model	**R**	**R Square**	**Adjusted R Square**	**Std. Error of the Estimate**
1	.474(a)	0.22	0.22	0.42
2	.648(b)	0.42	0.41	0.37
3	.736(c)	0.54	0.53	0.33

Table 20 - Analysis of Variance for Hypothesis 7

ANOVA(d)						
Model		**Sum of Squares**	**df**	**Mean Square**	**F**	**Sig.**
1	Regression	5.91	1	5.91	32.79	.000(a)
	Residual	20.38	113	0.18		
	Total	26.30	114			
2	Regression	11.03	2	5.52	40.49	.000(b)
	Residual	15.26	112	0.14		
	Total	26.30	114			
3	Regression	14.23	3	4.74	43.65	.000(c)
	Residual	12.06	111	0.11		
	Total	26.30	114			

Table 21 - Coefficients for Hypothesis 7

Coefficients(a)						
Model		Unstandardised Coefficients		Standardised Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	0.68	0.08		8.63	0.00
	Products are easy to find	0.34	0.06	0.47	5.73	0.00
2	(Constant)	-0.24	0.17		-1.44	0.15
	Products are easy to find	0.35	0.05	0.49	6.85	0.00
	Shop has good customer service	0.87	0.14	0.44	6.13	0.00
3	(Constant)	0.36	0.18		1.96	0.05
	Products are easy to find	0.52	0.06	0.73	9.39	0.00
	Shop has good customer service	0.87	0.13	0.44	6.87	0.00
	Shop is bright and well lit	-0.771	0.142	-0.421	-5.424	0.000

a. Dependent Variable: Will definitely come back to shop

5.8. Hypothesis 8

The statistical analyses are represented by Tables 22 – 24.

Table 22 - Model Summary for Hypothesis 8

Model Summary				
Model	**R**	**R Square**	**Adjusted R Square**	**Std. Error of the Estimate**
1	.017(a)	0.00	-0.01	1.83

Table 23 - Analysis of Variance for Hypothesis 8

ANOVA(b)						
Model		**Sum of Squares**	**df**	**Mean Square**	**F**	**Sig.**
1	Regression	0.10	1	0.10	0.03	.860(a)
	Residual	376.38	113	3.33		
	Total	376.49	114			

Table 24 - Coefficients for Hypothesis 8

Coefficients(a)						
Model		**Unstandardised Coefficients**		**Standardised Coefficients**	**t**	**Sig.**
		B	**Std. Error**	**Beta**		
1	(Constant)	3.39	0.39		8.62	0.00
	Shopping here is delightful experience	0.05	0.30	0.02	0.18	0.86

a. Dependent Variable: Amount spent

5.9. Hypothesis 9

The statistical analyses are represented by Tables 25 – 27.

Table 25 - Model Summary for Hypothesis 9

Model Summary				
Model	**R**	**R Square**	**Adjusted R Square**	**Std. Error of the Estimate**
1	.315(a)	0.10	0.09	0.63

a. Predictors: (Constant), Shopping here is delightful experience

Table 26 - Analysis of Variance for Hypothesis 9

ANOVA(b)						
Model		**Sum of Squares**	**df**	**Mean Square**	**F**	**Sig.**
1	Regression	4.91	1	4.91	12.46	.001(a)
	Residual	44.53	113	0.39		
	Total	49.44	114			

a. Predictors: (Constant), Shopping here is delightful experience

b. Dependent Variable: Frequency buy at this shop

Table 27 - Coefficients for Hypothesis 9

Coefficients(a)						
Model		**Unstandardised Coefficients**		**Standardised Coefficients**	**t**	**Sig.**
		B	**Std. Error**	**Beta**		
1	(Constant)	0.90	0.14		6.65	0.00
	Shopping here is delightful experience	0.37	0.10	0.32	3.53	0.00

a. Dependent Variable: Frequency buy at this shop

5.10. Hypothesis 10

The statistical analyses are represented by Tables 28 – 30.

Table 28 - Model Summary for Hypothesis 10

Model Summary				
Model	**R**	**R Square**	**Adjusted R Square**	**Std. Error of the Estimate**
1	.212(a)	0.05	0.03	0.47

Table 29 - Analysis of Variance for Hypothesis 10

ANOVA(b)						
Model		**Sum of Squares**	**df**	**Mean Square**	**F**	**Sig.**
1	Regression	1.18	2	0.59	2.64	.076(a)
	Residual	25.11	112	0.22		
	Total	26.30	114			

Table 30 - Coefficients for Hypothesis 10

Coefficients(a)						
Model		**Unstandardised Coefficients**		**Standardised Coefficients**	**t**	**Sig.**
		B	**Std. Error**	**Beta**		
1	(Constant)	1.16	0.17		6.67	0.00
	Shop is cheap	-0.11	0.05	-0.25	-2.25	0.03
	Prices are lower than surrounding shops	0.08	0.05	0.18	1.63	0.11

a. Dependent Variable: Will definitely come back to shop

5.11. Hypothesis 11

The statistical analyses are represented by Tables 31 – 33.

Table 31 - Model Summary for Hypothesis 11

Model Summary				
Model	**R**	**R Square**	**Adjusted R Square**	**Std. Error of the Estimate**
1	.167(a)	0.03	-0.05	0.49

Table 32 - Analysis of Variance for Hypothesis 11

ANOVA(b)						
Model		**Sum of Squares**	**df**	**Mean Square**	**F**	**Sig.**
1	Regression	0.73	8	0.09	0.38	.929(a)
	Residual	25.56	106	0.24		
	Total	26.30	114			

Table 33 - Coefficients for Hypothesis 11

Coefficients(a)						
Model		Unstandardised Coefficients		Standardised Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	0.94	0.28		3.29	0.00
	Close to home	0.03	0.03	0.10	0.93	0.36
	Close to work	0.02	0.03	0.06	0.57	0.57
	Easy drive into from main road	0.04	0.06	0.11	0.80	0.43
	Easy drive back onto main road	0.01	0.05	0.02	0.13	0.90
	Secure and safe	0.04	0.10	0.04	0.39	0.70
	Shop is clean	0.00	0.25	0.00	0.01	0.99
	Shop is bright and well lit	-0.11	0.23	-0.06	-0.48	0.63
	Facilities are visually appealing	0.02	0.09	0.02	0.17	0.87

a. Dependent Variable: Will definitely come back to shop

Chapter 6 Discussion of Results

6.0. Introduction

The results presented in Chapter 5 are discussed in terms of specific research Hypotheses, the literature reviewed and the research objectives. In the light of the unregulated nature of the forecourt convenience shops and their proliferation, the various research hypotheses were aimed at finding out what triggers or drives consumers to shop at these shops, their spending patterns, repatronage and frequency of shopping. The perceptions of South African patrons of forecourt convenience shops are important in the light of Shell's failure in the UK in the early eighties as described by Boyle (2002). The looming liberalisation of the petroleum sector further makes the study of this nature of great significance since it has not been done to date as far as the researcher could ascertain.

6.1. Hypothesis 1

(Brands - Petrol)

H_o: Petrol brands play no role in consumer motivation to shop at forecourt convenience shops.

H_a: Petrol brands play a role in consumer motivation to shop at forecourt convenience shops.

The hypothesis was tested by entering all possible variables into a stepwise regression model. The only variable with any explanatory power was walking distance as per Table 2, with petrol brand not even appearing in the model. The adjusted R Square of 0.08 means that only 8% variance is explained, consequently confirming that 92% of other unexplained factors not in this study drive petrol brand loyalty. The ANOVA results on Table 3 show significance of less than 5% at 0,1%, with the dependent variable as the Frequency of using other convenience shops of the same brand. Although there is less than 5% chance of being wrong if the null hypothesis is rejected, petrol brand of choice does not appear in the model.

Result: Fail to Reject the Null Hypothesis

6.2. Hypothesis 2

(Brands - Shops)

H_o: Shop brands play no role in consumer motivation to shop at forecourt convenience shops.

H_a: Shop brands play a role in consumer motivation to shop at forecourt convenience shops.

The hypothesis was tested by entering all possible variables into a stepwise regression model. There were 8 iterations as shown on Table 5. Shop brand was the second predictor selected by the model. The adjusted R Square of 0.52 after the eighth iteration means that 52% variance is explained, which is a good result. There are 48% of other unexplained factors not in this study or model that drive shop brand loyalty. The ANOVA results on Table 6 show significance of less than 5% at 0,0%, with the dependent variable as the Frequency of buying at this shop. There is less than 5% chance of being wrong if the null hypothesis is rejected.

Result: Reject the Null Hypothesis

Semeijn *et al.* highlighted the fact that store brands were challenging manufacturer's brands in various aspects; subsequently making significant contributions to profitability, store differentiation and loyalty.

6.3. Hypothesis 3

(Demographics - Age)

H_o: Age plays no role on products purchased, frequency of shopping and spend per trip at forecourt convenience shops.

H_a: Age plays a role on products purchased, frequency of shopping and spend per trip at forecourt convenience shops.

This hypothesis was tested by using ANOVA because there are more than two groups. The ANOVA results on Table 9 show insignificance of greater than 5% at 84,6% for amount spent, 41,6% for frequency of buying, 22,7% for items intended and 44,1% for items bought. This means that there is greater than 5% chance of being wrong if the null hypothesis is rejected.

Result: Fail to Reject the Null Hypothesis

Hypotheses 3 to 5 are aligned to segmentation which was defined by Kotler and Keller (2006) as customer groups which share similar sets of need and wants. These hypotheses intend to define whether certain segments can be defined based on age, gender and race.

6.4. Hypothesis 4

(Demographics - Gender)

H_o: Gender plays no role in products purchased, frequency of shopping and spend per trip at forecourt convenience shops.

H_a: Gender plays a role in products purchased, frequency of shopping and spend per trip at forecourt convenience shops.

The hypothesis was tested by using 2 tailed T-Test for Equality Means as per Table 11, since there are only two groups. The Levene's Test for Equality of Variances show significance for items bought at 0,023 or 2,3% which further leads to significance of 1,2% on the t-test for Equality of Means 2-tailed section. This means that there is less than 5% chance of being wrong if the null hypothesis is rejected.

Result: Reject the Null Hypothesis but only for items bought.

Table 10 supports the rejection of the null hypothesis on items bought because men are on average buying more items than women, with a mean of 1.33 against 0.95 for women. The other variables had no significance with Levene's Test for Equality of Variances at 73% for amount spent, 63% for frequency of buying at the shop, 31% for items intended and 65% for buying over intention. There would have been greater than 5% chance of being wrong if the null hypothesis was rejected for those variables.

6.5. Hypothesis 5

(Demographics - Race)

H_o: Race plays no role in products purchased, frequency of shopping and spend per trip at forecourt convenience shops.

H_a: Race plays a role in products purchased, frequency of shopping and spend per trip at forecourt convenience shops.

The hypothesis was tested by using 2 tailed T-Test for Equality Means as per Table 15 since there are only two groups, the low recorded numbers for Coloureds and Indians led the researcher to consolidate them into Black (Non White) category. The Levene's Test for Equality of Variances shows significance of less than 5% for frequency to buy at this shop at 0,00 or 0% which further which further leads to significance of 0% on the t-test for Equality of Means 2-tailed section. This means that there is less than 5% chance of being wrong if the null hypothesis is rejected for frequency to buy at this shop.

Result: Reject the Null Hypothesis but only for frequency to buy at this shop.

Table 13 supports the rejection of the null hypothesis on frequency to buy at this shop because whites are on average buying more times than non-whites, with a mean of 1.48 against 1.09 for non-whites. The other variables had no significance as per Table 14 ANOVA for Race results with amount spent at 10%, items intended at 31% and items bought at 5%. There would have been greater than or

equal to 5% chance of being wrong if the null hypothesis was rejected for those variables.

6.6. Hypothesis 6

(Hygiene Factors and Motivators – Spend per Trip)

H_o: Hygiene factors and motivators play no role on amount spent per trip.

H_a: Hygiene factors and motivators play a role on amount spent per trip.

The hypothesis was tested by entering all possible variables into a stepwise regression model. There was no variable with any explanatory power as per Table 16. The adjusted R Square of -0.03 means that only -3% variance is explained, consequently confirming that 103% of other unexplained factors not in this model drive spend per trip. The ANOVA results on Table 17 show insignificance of greater than 5% at 70.5%, with the dependent variable as the amount spent per trip and independent variables as a combination of hygiene factors and motivators. This means that there is a high chance of being wrong if the null hypothesis is rejected.

Result: Fail to Reject the Null Hypothesis

6.7. Hypothesis 7

(Hygiene Factors and Motivators – Repatronage Intention)

H_o: Hygiene factors and motivators play no role on repatronage intention.

H_a: Hygiene factors and motivators play a role on repatronage intention.

The hypothesis was tested by entering all possible variables into a stepwise regression model. There were 3 iterations as shown on Table 19. The three predictors selected by the model: Products are easy to find, Shop has good customer service and shop is bright and well lit all happen to be motivators. The adjusted R Square of 0.53 means that 53% variance is explained, with 47% of other unexplained factors not in this model driving repatronage. The ANOVA results on Table 20 show significance of less than 5% at 0,0%, with the dependent variable as the Will definitely come back to shop. This means that there is less than 5% chance of being wrong if the null hypothesis is rejected.

Result: Reject the Null Hypothesis.

This result delineates hygiene factors and motivators by selecting only motivators as predictors in the regression model. The result would suggest that only motivators play a role in repatronage as opposed to hygiene factors.

Hypotheses 6 and 7 are adapted from the original work of Herzberg (1974), albeit focused on employees, this research aimed to extend the role of satisfiers and dissatisfiers to a retailing environment. Motivation drivers can be adapted to

various settings but the generic theory remains the psychology theory. Newman and Cullen (2002) further proposed a consumer motives model which is used as link to Herzberg's theory and their findings that customers will most likely shop elsewhere if their perceptions of satisfiers and dissatisfiers are not addressed adequately, lent justification for the formulation of these hypotheses.

6.8. Hypothesis 8

(Total Customer Experience – Spend per Trip)

H_o: Total Customer Experience plays no role on amount spent per trip.

H_a: Total Customer Experience plays a role on amount spent per trip.

The hypothesis was tested by entering all possible variables into a stepwise regression model. There was no variable with any explanatory power as per Table 22. The adjusted R Square of -0.01 means that only -1% variance is explained, consequently confirming that 101% of other unexplained factors not in this model drive spend per trip. The ANOVA results on Table 23 show insignificance of greater than 5% at 86%, with the dependent variable as the amount spent per trip and independent variable as shopper delight. This means that there is a high chance of being wrong if the null hypothesis is rejected.

Result: Fail to Reject the Null Hypothesis

6.9. Hypothesis 9

(Total Customer Experience – Frequency of Shopping)

H_o: Total Customer Experience plays a role on frequency of shopping.

H_a: Total Customer Experience plays no role on frequency of shopping.

The hypothesis was tested by entering all possible variables into a stepwise regression model. Table 25 shows the only predictor selected by the model as Shopping here is a delightful experience. The adjusted R Square of 0.09 means that 9% variance is explained, with 91% of other unexplained factors not in this model driving total customer experience. The ANOVA results on Table 26 show significance of less than 5% at 0%, with the dependent variable as the frequency to buy at this shop. This means that there is less than 5% chance of being wrong if the null hypothesis is rejected.

Result: Reject the Null Hypothesis

Courtney and Hoch (2006) found that customer experiences impact on the repatronage intentions and ultimately frequency of shopping and spending in a particular shop. Kaltcheva and Weitz (2006) found that total customer experience positively affects unplanned spending, duration of store visit and social interaction.

6.10. Hypothesis 10

(Price - Repatronage)

H_o: Price plays no role in consumer intention to come back for shopping.

H_a: Price plays a role in consumer intention to come back for shopping.

The hypothesis was tested by entering all possible variables into a stepwise regression model. There was no variable with any explanatory power as per Table 28. The adjusted R Square of 0.03 means that only 3% variance is explained, consequently confirming that 97% of other unexplained factors not in this model drive repatronage. The ANOVA results on Table 29 show significance of greater than 5% at 7.6%, with the dependent variable as will definitely come back to shop and independent variables as this shop is cheap and prices are lower than surrounding shops. This means that there is a greater than 5% chance of being wrong if the null hypothesis is rejected.

Result: Fail to Reject the Null Hypothesis

Morschett *et al.* noted that price advantages and quality advantages are not diametrically opposed but are separate factors, with convenience as a central dimension of retail store perceptions of consumers. Yankelovich and Meer (2006) view pricing as one of the areas that segmentation can be diversified into. Wallace *et al.* (2004) observed that the link between loyalty and profitability is strong, which is positively influenced by prices. Loyal customers are willing to pay higher prices. Berry (2001) lists fair prices as a pillar of total customer experience.

6.11. Hypothesis 11

(Hygiene Factors - Repatronage)

H_o: Hygiene factors play no role in consumer intention to come back for shopping.

H_a: Hygiene factors play a role in consumer intention to come back for shopping.

The hypothesis was tested by entering all possible variables into a stepwise regression model. There was no variable with any explanatory power as per Table 31. The adjusted R Square of -0.05 means that only -5% variance is explained, consequently confirming that 105% of other unexplained factors not in this model drive repatronage. The ANOVA results on Table 32 show insignificance of greater than 5% at 92.9%, with the dependent variable as will definitely come back to shop and independent variables as pure hygiene factors without motivators as per Table 33. This means that there is a high chance of being wrong if the null hypothesis is rejected.

Result: Fail to Reject the Null Hypothesis

This hypothesis validates Hypothesis 6 and 7 where it was found that only motivators explain why people come back to shop and not hygiene factors.

Table 34 - Summary of Hypotheses

Hypothesis 1	Petrol brands play no role in consumer motivation to shop at forecourt convenience shops.	Fail to Reject the Null Hypothesis
Hypothesis 2	Shop brands play no role in consumer motivation to shop at forecourt convenience shops.	Reject the Null Hypothesis
Hypothesis 3	Age plays no role on products purchased, frequency of shopping and spend per trip at forecourt convenience shops.	Fail to Reject the Null Hypothesis
Hypothesis 4	Gender plays no role in products purchased, frequency of shopping and spend per trip at forecourt convenience shops.	Reject the Null Hypothesis but only for items bought.
Hypothesis 5	Race plays no role in products purchased, frequency of shopping and spend per trip at forecourt convenience shops.	Reject the Null Hypothesis but only for frequency to buy at this shop.
Hypothesis 6	Hygiene factors and motivators play no role on amount spent per trip.	Fail to Reject the Null Hypothesis
Hypothesis 7	Hygiene factors and motivators play no role on repatronage intention.	Reject the Null Hypothesis.
Hypothesis 8	Total Customer Experience plays no role on amount spent per trip.	Fail to Reject the Null Hypothesis

Hypothesis 9	Total Customer Experience plays a role on frequency of shopping.	Reject the Null Hypothesis
Hypothesis 10	Price plays no role in consumer intention to come back for shopping.	Fail to Reject the Null Hypothesis
Hypothesis 11	Hygiene factors play no role in consumer intention to come back for shopping.	Fail to Reject the Null Hypothesis

Chapter 7 Conclusion

7.0. Introduction

This research was conducted to find out what motivates consumers to visit forecourt convenience shops, and what makes them spend more and ultimately what would lead them to come back. The main areas investigated for independent variables were the role of brands (petrol and shop), demographics (age, gender and race), hygiene factors and motivators, total customer experience (before arriving at the shop, while in the shop and when leaving the shop) and price. These independent variables were assessed statistically against dependent variables such as spend per trip, repatronage intentions and frequency of shopping. These dependent variables are key drivers of growth and profitability.

7.1. Findings

It is apparent from this research that petrol brands play no role in the decision of customers to go to forecourt convenience shops; this is an interesting revelation specifically for oil companies, as it would seem the tail is now wagging the dog. Petrol brand does not even feature in the predictors selected by the regression model whereas shop brand was a second predictor selected. Customers are now basing their motives to shop on specific shop brands, excluding fuel as a motive. Forecourt shops are beginning to create their own profiles based on customers' perceptions of service and experience.

The issue of demographics is of essence particularly in a heterogeneous society like South Africa. It is quite evident that age plays no role in spending, frequency of

shopping and buying over intention. Gender, on the other hand, plays a role but only regarding items bought, which means women are buying different items than men at forecourt convenience shops, thus forecourt shops positioning and promotions towards men and women should be distinctive. It is also clear that men are buying more items than women. Race does play a role in consumer motivations but only on shopping frequency at the specific shops that were surveyed, with whites buying more than non-whites, which should not be surprising given South Africa's history.

Hygiene factors and motivators do not inspire people to spend more. It is, however, important to note that consumers will be inspired to return to the shop because of the motivators. This finding is in line with the literature since hygiene factors are deemed to be a given, and will not necessarily make people buy more.

The experience of customers from the time they drive off the road, into the parking lot, their interaction with the sales staff, and their perception about the store layout and ambience and the departure from the shop will not lead people to spend more. Those experiences will, however, lead customers to shop more often.

Price plays no role in customers' intention to return to forecourt convenience shops. The very decision of going to such a shop removes price from the equation as convenience is about speed of service and ability to shop at any time, thus consumers would not necessarily use these shops if price would make them choose between going back to a shop and not going back.

7.2. Conclusion

The drivers of consumer motivations are clearly issues of brand identity of each shop not the fuel brand, gender but only in relation to items bought, race but only on frequency of shopping. Motivators play an important role in consumers' decisions to come back to shop, and the shop owners must clearly understand motivators in respect to their specific shops and customers. The experience of customers when shopping at forecourt convenience shops is critical to their frequency of shopping and this is a clear turnover driver which must be enhanced. Price does not influence why people go to forecourt convenience shops and whether they will return.

7.3. Implications for stakeholders

The findings and conclusion of this research have varying implications for different stakeholders:

7.3.1. Management

Managers of filling stations with forecourt convenience shops should separate the administrative functions of these two entities. They may seem to be complementary, but it is very clear from the research findings that customers do not necessarily patronise forecourt convenience shops because they view them as extensions of the oil brands.

Specialist convenience skills are required to manage these shops, since a clearer and focused understanding of consumer motivators is required. Managers should stay ahead of the game by fully understanding their specific target markets and spending profiles, to better enable them to customise their product offering. The

understanding of the target market leads to appropriate staff selection based on skills and attitude, the reformatting of the shop layout and remodelling the shop where necessary. Management will have to broaden their knowledge base outside of their specific brands, in order to benchmark against the competition and its consumer motivations.

7.3.2. Potential entrants into the market

This report highlights certain key findings that would aid a potential entrant in determining from day one how the business should be run. It further demonstrates the issues that make people come back and what influences spend per trip, thus enabling the potential entrant to fully understand the potential profitability of the store and make an informed decision on whether to enter the industry. The research further assists a potential entrant in determining which area to invest in based on his/her preferences which can be matched with responses from customers in a certain geographic area. The potential entrant will also be in a position to understand the type of site location, store layout and staffing required based on the area selected. The potential entrant can further decide which brand to choose based on different motivators for different brands.

7.3.3. Consultants to the oil industry

Traffic engineers determine the feasibility of filling station sites, but the model they use is a traffic count based model. This model counts traffic on the roads past the filling station and calculates an interception rate and an average fill per car. The average fill per car is the extrapolated to guess the shop turnover conversion rate from the fuel sold. Major assumptions go into shop turnover prediction based on

this conversion ratio. This research invalidates the link between petrol sales and shop sales. Consultants need to understand the motivators of convenience shops independent of forecourt fuel sales. It is important for the oil companies to fully comprehend the forecourt convenience market and its implications to the fuel business, especially in the light of possible deregulation of this industry.

7.3.4. Other organised convenience retailers

Other organised traders (for example Spar and Friendly Grocer) would also be advised to study the forecourt convenience market to understand the impact of this market on their businesses, especially when consumers shop there in spite of price. This business model could potentially disrupt or cannibalise existing convenience retailers if those retailers decide to continue on their current operating model without taking into account the forecourt convenience shop and its consumer motivations.

7.4. Recommendations for future research

This research was based on a sample of filling stations in Gauteng with the exclusion of Total. It would be proper to do a comprehensive research of the entire South African forecourt convenience retailing market to truly get a national view of consumer motivations.

Future research could go further by determining a clear profile and profitability per shopper profile in specific geographic areas, based on the dataset that has been generated by this research.

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APPENDICES

APPENDIX 1 - Questionnaire

UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

FORECOURT CONVENIENCE SHOP SURVEY

General Information

Name of Garage:							
Brand:	1	BP	2	CALTEX	3	ENGEN	4	SASOL
	5	SHELL	6	TOTAL			
Location:							

(Write Street Name or the two streets between which the garage is located)

Side of the Road:	1	Corner Site	2	Midblock - 1 Street Access	3	Midblock - Accesses on 2 Streets

Demographic Information

1. Age :	1	Less than 25	3	36 to 45	5	Greater than 55
	2	26 to 35	4	46 to 55		
Gender :	1	Male	2	Female		
Race	1	Black	3	Indian		
	2	Coloured	4	White		

A - Location

1 - Strongly agree 2 - Agree 3 - Neither agree nor disagree 4 - Disagree 5 - Strongly Disagree

How much do you agree with the following statements:

A1	I shop here because its closer to where I stay	1	2	3	4	5
A2	I shop here because its closer to where I work	1	2	3	4	5
A3	I shop here because the shop is visible from the main road	1	2	3	4	5
A4	I shop here because its easy to drive into the from the main road	1	2	3	4	5
A5	I shop here because its easy to drive back onto the main road	1	2	3	4	5
A6	I shop there because there is a lot of parking	1	2	3	4	5

B - Brand

1 - Strongly agree 2 - Agree 3 - Neither agree nor disagree 4 - Disagree 5 - Strongly Disagree

How much do you agree with the following statements?

B1	I shop here when I fill my car with petrol	1	2	3	4	5
B2	I fill up my car with petrol here because this my petrol brand of choice	1	2	3	4	5
B3	I shop here because this is my shop brand of choice	1	2	3	4	5
B4	This petrol brand has cleaner fuels	1	2	3	4	5
B5	The brand of petrol I fill up with makes very little difference to me	1	2	3	4	5
B6	All major brands of petrol are the same	1	2	3	4	5

How much do you agree with the following statements in relation to this convenience shop?

B7	I come to this shop when I need to use an ATM	1	2	3	4	5
B8	I come to this shop because they bake fresh bread and rolls	1	2	3	4	5
B9	It is close enough for me to walk here and shop	1	2	3	4	5
B10	I only shop here in emergencies	1	2	3	4	5
B11	I shop here when the supermarkets are closed	1	2	3	4	5
B12	I shop here when all the other shops in my area are closed	1	2	3	4	5
B13	I shop here on the weekends	1	2	3	4	5
B14	The shop caters for all my product / service requirements	1	2	3	4	5
B15	I shop here on public holidays	1	2	3	4	5
B16	I shop here only when I have a few items to buy	1	2	3	4	5
B17	I find this shop very cheap	1	2	3	4	5

B18	I shop here when I am rushed for time	1	2	3	4	5
B19	I shop here because the store is secure and safe	1	2	3	4	5
B20	I come to this shop to have my gas bottle refilled	1	2	3	4	5
B21	The shop has good customer service	1	2	3	4	5
B22	The forecourt has good customer service	1	2	3	4	5
B23	The shop is clean	1	2	3	4	5
B24	I get speedy service	1	2	3	4	5
B25	The shop is bright and well lit	1	2	3	4	5
B26	The facilities are visually appealing	1	2	3	4	5
B27	Prices are lower than competing shops in the area	1	2	3	4	5
B28	Regular communication of items on promotion	1	2	3	4	5
B29	Spacious layout	1	2	3	4	5
B30	Offers latest products in the market / responsive to changes in trends	1	2	3	4	5
B31	Product placing is orderly and easy to find	1	2	3	4	5
B32	The shop staff is friendly and greets customers	1	2	3	4	5
B33	The forecourt staff is friendly and greets customers	1	2	3	4	5
B34	I am pleased with the overall service	1	2	3	4	5
B35	Shopping here is a delightful experience	1	2	3	4	5
B36	I am completely satisfied with the shopping experience	1	2	3	4	5
B37	I will definitely come back to shop here	1	2	3	4	5

C - Frequency of Use of Brand

1 - Yes 2 - No

How frequently do you buy at this convenience shop?

C1	Once a week or more often	1	2
C2	Two to three times a month	1	2
C3	Once a month or less often	1	2

How frequently do you buy from other convenience shops of this brand?

C4	Once a week or more often	1	2
C5	Two to three times a month	1	2
C6	Once a month or less often	1	2

D - Average Amount Spent Per Trip at the Convenience Shop

Put and "X" next in the appropriate box

How much do you spend per trip at the convenience shop?

1	Less than R10	5	R41.00 to R50.00	
2	R11.00 to R20.00	6	R51.00 or more	R
3	R21.00 to R30.00	7	Don't know	
4	R31.00 to R40.00			

E - Items Normally Bought

a - What did you come here to buy?
b - What did you actually buy?

Put and "X" next in the appropriate box

1. Charcoal or braai wood	a	b	12. Magazines	a	b
2. Cigarettes	a	b	13. Milk	a	b
3. Coffee	a	b	14. Newspaper	a	b
4. Flowers	a	b	15. Paraffin	a	b
5. Fresh bread/Rolls	a	b	16. Pre-paid Cellular phone cards	a	b
6. Fruit &Veg	a	b	17. Prepaid Electricity	a	b
7. Gas	a	b	18. Pre-paid Telkom phone cards	a	b
8. Groceries	a	b	19. Snacks (sweets, chips, ice cream, cool drink)	a	b

9. Hot food/Take always	a	b	20. Toiletries	a	b
10. Ice cubes	a	b	21. Nothing	a	b
11. Lotto	a	b			

	Filling Station	Street Address	Suburb	City
1	Sasol Michelle	Michelle Avenue and Jochem Van Brugge		Alberton
2	Engen Jacqueline	Jacqueline and Venter		Alberton
3	BP Randhart	Swartkoppies Road		Alberton
4	Total Sandvale	Voortrekker Road and Helston		Alberton
5	Shell Park SS	Van Riebeeck and Andries Pretorius		Alberton
6	Engen Techno Park	John Vorster Drive and Oak	Highveld Park	Centurion
7	BP Centurion	Bloukrans Street and John Vorster		Centurion
8	Total Hennops	Old Johannesburg Road and Magiel	Hennops Park	Centurion
9	Shell Jean Avenue	Jean Avenue and Lenchen Street		Centurion
10	Sasol Jean Avenue	Lyttelton and Jean Avenue		Centurion
11	Caltex Oaklands	4th Street and Kruger	Norwood / Oaklands	Johannesburg
12	Sasol Houghton	Louis Botha and Fir	Houghton	Johannesburg
13	Shell Glenhove	Glenhove and Central	Houghton	Johannesburg
14	Engen Norwood	86 Grant Avenue and Ivy Louis Road	Norwood	Johannesburg
15	BP Houghton	Louis Botha Avenue	Houghton	Johannesburg
1	BP Winmore	De Villerbos	Moreleta	Pretoria
2	Shell Moreleta	Rubenstein and Streuther	Moreleta	Pretoria
3	Caltex Constatia Park	Hans Strydom and Louis Botha	Constantia Park	Pretoria
4	Engen Garstkloof	Delams Road and Garstkloof	Wingate Park	Pretoria
5	Total Elardus Park	Hans Strydom	Elardus Park	Pretoria
6	Total Newlands	Lois and Dely		Pretoria
7	Shell Atterbury	Atterbury Drive		Pretoria
8	BP Charles Street	Charles Street and Atterbury Drive		Pretoria
9	Caltex Garsfontein	George Daniels and Winifred Yell		Pretoria
10	Engen Atterbury	Atterbury Drive and Menlyn		Pretoria
11	Shell Sandton Court	Rivonia Road and South		Sandton
12	BP Grayston	Rivonia Road and Grayston Drive		Sandton
13	Total Sandton	Sandton Drive and Marie Avenue		Sandton
14	Engen Sandown	Grayston Drive and Helen		Sandton
15	Sasol Rivonia	Rivonia Boulevard and 12th Avenue		Sandton