Customer buying behavior at selected petroleum shops in Cape Town

by

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DECLARATION

I, John Franklin Bailey, declare that the contents of this dissertation/thesis represent my own unaided work, and that the dissertation/thesis has not previously been submitted for academic examination towards any qualification. Furthermore, it represents my own opinions and not necessarily those of the Cape Peninsula University of Technology.

Signed **Date**

ABSTRACT

The dynamic nature of modern organisations, characterised by hyper turbulence, necessitates that organisations remain receptive to the plethora of internal and external forces driving changes in strategy. One such organisation is that of Engen Petroleum Limited which operates in an ever-changing, highly competitive environment. In order to remain the market leader, Engen needs to revisit its strategy to contend with market forces, bearing in mind that globalisation, as well as international ownership of competitor companies, play a role. In order to maintain a competitive advantage, the role of brands in the context of convenience is important, as brand recognition makes decision-making simpler for consumers who are in a rush. It is hence deemed expedient for forecourt retailers to understand customer satisfaction drivers, such as quality, service and convenience (Molefi, 2007). The current research focuses on the Engen Western Cape Quick Shop network, and in particular, investigates the possible reasons, namely growth rates, product offering, location, and customer service, for performance compared to the national average. A questionnaire/survey was conducted to determine the demographic characteristics of customers as well as the factors that influence their propensity to utilise Engen Quick Shops. This research was intended to provide Engen Petroleum Limited with data and information to enable the Western Cape Convenience dealer network to not only grow at the national average, but also to position itself at the forefront of the Convenience Store market.

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CHAPTER ONE

INTRODUCTION AND PROBLEM STATEMENT

1.1 INTRODUCTION

According to the Human Sciences Research Council (1992), the South African retail fuel industry is a highly sophisticated industry built on a solid infrastructure. Despite their relative profit in selling fuel, many service stations have explored alternative sources of income in order to remain profitable (Thomas, 2005). Reid (2004) reports that in the USA, fuel is considered the volume driver, while convenience store sales drive the bulk of the profits. Moreover, Sartorius (2007) reports on a survey conducted by National Petroleum News in 2005, which indicated that 66.5% of sales relate to motor fuel, but these sales only contributed 31.7% to the gross profit in the industry. A corollary of this is that 68.3% of the gross profit in the US fuel retail industry is derived from convenience store sales. Similarly, Harwood (2006) reveals that the situation in the United Kingdom is no different. South African fuel retailers are already relying heavily on convenience store sales, in an overtraded industry, to remain profitable.

Du Plessis and Britz (2007: 263) report that the number of filling stations across the country has increased exponentially relative to the number of motor vehicles on the road. Indeed, AC Nielsen (2006) noted that in excess of 1400 forecourts had opened within the preceding ten years, with an annual growth rate of 19.3% and a market size of R 4.7 billion. Accordingly, Molefi (2007: 26) maintains that store brands are increasingly challenging manufacturer’s brands on quality and price, while making immense contributions to profitability, store differentiation and loyalty.

Juxtaposed against the Consumer Price Index Excluding Mortgages (CPIX), it can indeed be regarded as a profitable line of business. Against this backdrop, Du Plessis and Britz (2007: 263 attribute the increase in such filling stations to an increase in the number of motor vehicles on the roads, although they also suggest that an alternative plausible reason for the proliferation of filling stations is the potential income that such a filling station could generate for an owner. Molefi (2007: 26) maintains that “the mooted liberalisation of the oil industry in South Africa has made a study into the dynamics of Alternative Profit Centres (APC) a strategic necessity, particularly in previously disadvantaged communities where there is a significant growth and demand".

Mohr, Sengupta and Slater (2010: 62) posit the view that "Businesses that utilise innovation to differentiate themselves from the competition are also known as product leaders, prospectors, pioneers and first movers". Markham (1998:226) maintains that "neighbourhood and convenience centres are continuing to provide important shopping facilities and new initiatives are continuing for the expansion of retail growth at petrol stations and other places with big passing trade for convenience goods." This is possibly due to a change in buyer patterns and behaviour with consumers preferring to shop at convenient locations with long operating hours (Prinsloo, 2003:617).

Prinsloo (2004:13) postulates that "Convenience shopping is the name of the game. Research indicates that convenience shopping is conducted twice or three times per week at a more convenient local retailer". O' Sullivan (2003:1) posits the view that "There is an ever-increasing trend to stop off at the local convenience centre to purchase daily requirements". This change in shopping pattern has been facilitated by the entry of national retailers into the convenience centre market. Shoppers do not have to compromise on quality or pay higher prices when shopping at their 'local' because they are now home to the same retail marques found at larger regional centres.

Underhill (2002:115) corroborates this by indicating that convenience shopping plays a much bigger role in modern times as the changes in women's lifestyles with more women in full time jobs. Prinsloo (2004:13) also further indicates that filling stations cater for daily convenience purchases mainly because they offer convenient and ample parking in a well lit and safe environment. Most of the new filling stations express convenience stores offer fast food products as well as take-away and bakery products. The opening of express Woolworths Food stores within these garage stores further leads to the growing attractiveness of these stores (Prinsloo, 2004:13).

Customers often buy more than just fuel when visiting a fuel retail station (Netz & Taylor, 2002) and customer convenience appears to be driving the industry (Bainbridge, 2000). In this regard, fuel retail stations are increasingly differentiating themselves through the additional services that are offered and the presence of convenience stores, car wash facilities and specialty stores increase the market share of a fuel station (Chan *et al.,* 2005).

General cleanliness and appearance, as well as the quality and speed of service, are other factors that improve the customers' experience and increase repeat customers. These variables are even more important within a South African context where price is regulated and fuel stations need to differentiate themselves by a means other than fuel price in order to maintain and increase market share. In America, visionary companies are turning fuel retail stations into more convenient transitory stops or even final destinations by providing a variety of services through a 'village hub' type service station (Weirauch, 2000).

Molefi (2007:26) found that patronage of convenience could not be ascribed to the price of good at forecourt convenience shops. He argues that one of the major reasons for frequenting convenience stores is about speed of service and ability to shop at any time. In addition, he contends that, as lifestyles and traditional roles in South Africa change, women are also increasingly utilizing forecourt convenience stores.

1.2 MOTIVATION FOR THE STUDY

Engen is an African-based petroleum company with a history going back to 1897 when the UK branch of the American Vacuum Oil Company set up a sales office in Cape Town. The company eventually became part of the US-based Mobil Corporation. Since its early establishment, there has been a proud history of dynamic growth. The enterprise grew rapidly through a series of amalgamations and name changes over the years, to create the largest energy group in Southern Africa. In May 1990, the company was renamed Engen and in 1992, Engen Limited, was listed on the Johannesburg Stock Exchange.

In May 2004, Engen entered into a lubricants alliance with ExxonMobil. ExxonMobil is the world's largest manufacturer of lubricant basestocks, a leading marketer of finished lubricants, and the world's leading producer of synthetic lubricants. ExxonMobil supplies lubricant and petroleum specialty products to nearly 200 countries and territories through its global network of 13 lube refineries.

The basis of the Engen/ExxonMobil alliance is that ExxonMobil provides technical and marketing support while Engen is the sole marketer and distributor of a range of ExxonMobil's lubricants in South Africa, Namibia, Botswana, Lesotho and Swaziland. The range of lubricants that Engen manages and markets includes Engen, Mobil, and selected Esso products.

In an ongoing quest for sustainability and profitability, Engen took the bold step and entered the convenience market. (Engen sustainability report, 2006). Hence the core business of Engen is:

- the refining of crude oil
- the marketing of primary refined petroleum products in Africa
- the provision of convenience services through their retail network.

In the early 1970's convenience buying was promoted in the United States and Europe respectively. This was born mainly as a result of the 7-11 convenience store concepts which proved extremely popular during this time. Smith (2007) states that the convenience concept started with the Southland Ice companies in the US when they realized that people needed to buy basic necessities like bread, eggs, milk etc after the conventional grocery stores had closed. As a result, shop owners of these ice franchises stocked their stores with these additional items and stayed open till late. Convenience was further accelerated by the emergence of the self pump service, and in this way, through the use of the petroleum network, it made it easier to access a variety of goods.

Bosch, (2009) postulates that petroleum brands identified this as an opportunity to add value to the buying experience, and aggressively addressed it in a superior manner. According to him, the convenience model for Engen Petroleum South Africa was based on the careful research conducted in Canada in developing a C- store model for the Esso brand. The primary focus of the C store model was on what Bosch refers to as the four C's;

- Cool drinks
- Confectionary
- Cigarettes
- Crisps

C Store Canada is an organization geared to help the retailer through the diverse areas of management expertise needed to meet the challenge of a fast growing market place. The magazine covers merchandising focused articles on relevant food and consumer product categories, the latest consumer demographics, store design and layout, carwash and petroleum operations plus news, events and issues as they relate to c-store operators.

The four C's the model proved to be successful and in 1978, learnings of this model was transported back to South Africa. According to Bosch, Engen (then trading as Mobil SA) based its marketing thrust on the basis of the research conducted in Canada. The findings of this research indicated that most SA motorists/consumers were motivated to make a purchase from petroleum convenience stores. However, this would be based on price, product quality, service and convenience. Further research conducted in South Africa indicated that Engen had good quality products, and that the fact that the market was regulated, meant that there was no impact on the price. Convenience however had to be enhanced and in so making the service and convenience motivators synonymous with the Engen Brand.

Euromonitor, a privately owned London based market research firm supports the fact that as consumers lead increasingly busy lives, the growing demand for convenience and value for money has steadily increased. Leading retailers in South Africa are addressing these needs by introducing new outlet formats. According to them, this is best seen by the introduction of Pick 'n Pay stores at the British Petroleum forecourts which was as a result of the alliance formed by their rival company Engen with the Woolworths brand when they created the one stop model.

According to the Engen History report (2006), the first two Woolworths Food shops were opened in Cape Town in September 2000 as test sites in September 2000. It stipulates that it was the first time that a major retailer made its product available to the 24 – hour convenience retail market and the concept was an instant hit with consumers. The Engen Quick shop outlets proved the viability of convenience outlets for their consumers, resulting in a 36% growth in net contribution and a turnover of R500 million in 1999. The alliance with Woolworths took this phenomenal growth to the next step. Research recorded an overwhelming positive response from customers who enjoyed the luxury of having access to fast, convenient, high quality food offerings, and 24 hours a day. They especially appreciated the fact that there were no premiums on prices at the Engen-Woolworths food stops. The innovative concept was so successful that it resulted in the roll out of this partnership on Engen forecourts throughout the country.

In addition to providing high quality convenience to consumers through the Engen –Woolworth's alliance, the petroleum company also entered into an agreement with a fast food corporation. In 2001, Engen signed a preferred provider's agreement with Steers Holdings. This in effect, made way for debonair pizzas and Fishaways Quick Service Restaurants to be established at suitable service stations (Engen history report, 2006). Smith, (2007) states that convenience store have grown into the petrol stations and corner stores that we see today. According to him, convenience has resulted in easy access to feed a nicotine habit, spoil your diet or even buy that emergency beer.

Bosch (2009) affirms that it is important to develop relationships with suppliers in order to support effective convenience marketing so as to provide an effective supply chain. The effective management of this marketing principle also resulted in the Engen brand being one of the biggest sellers of Coca Cola in South Africa.

Bosch states that "often a means in which to drive a service campaign is through the use of a pay off line" (Bosch, 2009). For Engen, this pay off line was "with us you are number one". Advertisements are frequently used to support marketing strategies (www.consumerpsychologist.com). According to Bosch (2009), Engen used a similar approach and directed all their initial advertisements toward a central theme, "We're on your doorstep". This play on words also supported the fact that at the time, Engen, in comparison to other petroleum brands had the most sites and, consequently, was more conveniently located than all other petroleum brands Thus it was easier for Engen to leverage their already established petroleum network to bring convenience to its consumers.

Bosch (2009) asserts that the convenience offer evolved over a time frame of 32 years (1978 to date). However, in essence, it seems as though the primary motivator, convenience, which was identified in the 1970's as depicted by previous researchers, still applies today, although, convenience means a lot more in this day and age. It has given rise to a new lifestyle that places far more independence on expediency than was ever imagined. The above literature on the history of Engen's convenience model therefore supports the fact that Engen was successful in rolling out their strategic initiative in bringing convenience to the greater South Africa. Not only were they successful in bringing this concept to the metropolis, but also successful in bringing convenience to the informal settlements/townships. Developing a consistent store image is a common goal of retailers (Peter & Olson, 1990). This involves coordinating the various aspects of store image to appeal to a specific market segment.

It is against this backdrop that this research is aimed at highlighting the factors used by consumers when choosing a particular store. In turn the strengths and weaknesses of a particular store's image can be compared with its closest competitor's. Based on this research, store management may then change certain attributes of the store to develop a more favourable image.

1.3 AIMS AND OBJECTIVES

The objectives of this research include, inter alia,

- To determine whether a relationship exists between the store choice and each of the biographical variables (age, gender, home language, population group and income) respectively.

- To compare and contrast the choice of store with each of the functional elements of store image (general store characteristics, store location, store physical characteristics, product range, prices charged, store personnel, advertising and customer services).

- To correlate each of the biographical variables (age, gender, home language, population group and income) with the functional elements of store image (general store characteristics, store location, store physical characteristics, product range, prices charged, store personnel, advertising and customer services).

1.4 HYPOTHESES

1. "There is no significant difference in the choice of store with respect to age, gender, home language, population group, and income levels respectively".

2. "There is no significant difference in the choice of store with respect to the general characteristics of the store, store location, product range, physical characteristics of the store, services offered, store personnel, prices charged and advertising respectively".

3. “There is no relationship between the biographical details of the subjects (age, gender, home language, population group and income) and the functional elements of store image (general store characteristics, store location, store physical characteristics, product range, prices charged, store personnel, advertising and customer services) respectively”.

1.5 DELIMITATIONS OF THE STUDY

A main limitation of the study relates to the sample size chosen. The sample size of 246 residents in the Western Cape is too small.

In interpreting the results which emanated from the current study, a number of limitations have been noted. Data was collected via self-reported responses; common method variance could have inflated the findings. Research relying more upon archival and longitudinal data would allow greater confidence in the conclusions. Generalizations might not be made about the population as a whole, due to the fact that the sample is too small and is not representative of the population (Babbie & Mouton, 2001). Hence, external validity could be enhanced by selecting a larger sample.

The sample in this study focused on respondents in the Western Cape, therefore generalizations cannot be made about the rest of the patrons ate forecourt or convenience stores. As the study was cross-sectional and therefore only concentrated on respondents’ perceptions at a particular point in time, it is possible that developments over time could alter these perceptions.

A further limitation of the research was the use of a non-probability sampling design, namely convenience sampling. This implies that the results of the study cannot be generalised to the general population. Furthermore, the study was confined to one area of the Western Cape, implying it cannot be generalised to all areas, because of the cultural, economic and social differences.

1.6. LAYOUT OF THE THESIS

Chapter 2 discusses various concepts related to convenience stores and provides insight into the history, definitions and objectives of this study.

Chapter 3 addresses the research design. A cross sectional research design, using a quantitative approach (questionnaires) was utilized. Data was collected at forecourt stores where a self developed questionnaire was administered.

Chapter 4 provides insight into the most salient findings which emanated from the research. Results are presented in tabular as well as graphical format in order to assist with understanding of the main findings which emerged from the survey.

Chapter 5 provides the conclusion, limitations of the study and recommendations for further studies. This is based on conclusions which emerged from the current survey, while also juxtaposing this against research findings within the retail field as well as more specifically within forecourt convenience stores.

1.7 SUMMARY

The primary objectives of the research, the motivation for the current research, as well as the hypotheses generated for the purpose of answering the research question being investigated were discussed. The limitations of the study are delineated to show which areas need to be improved on, in order to enhance the scientific quality of the research.

CHAPTER TWO

2.1 INTRODUCTION

This chapter presents the literature review conducted on convenience stores and provides an insight into the theoretical framework utilized in the current research. Pertinent theories underpinning consumer behaviour, most notably store image and loyalty are discussed.

2.1.1 WHO IS THE CONSUMER?

Hawkins et.al.(1989) explain the consumer is a decision-making unit (individual, family, household or firm) that takes information, processes the information (consciously or unconsciously) in light of the existing situation, and takes actions to achieve satisfaction and an enhanced lifestyle.

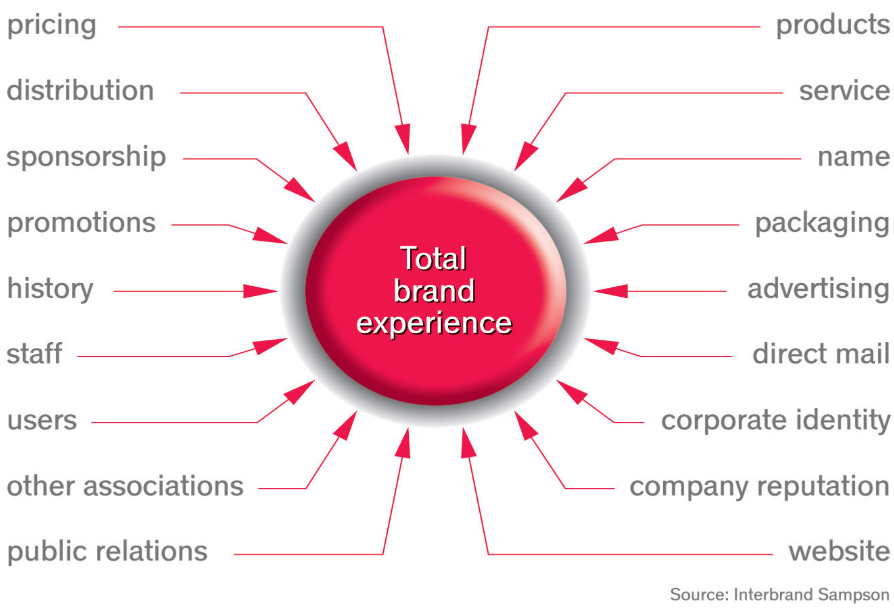
Consumers like to think of themselves as intelligent shoppers. They have certain evaluative store criteria established in their minds and compare these with their perceptions of a store's characteristics. As a result of this process, stores are characterised as both acceptable and unacceptable, and hence, will be patronised on that basis. If the resulting shopping experience is favourable, consumers are reinforced in their learning experience and the matter of store choice will become largely routinised over a period of time (Loudon & Bitta, 1995).

Various factors influence the move by consumers to forecourt convenience stores, including hygiene, safety, brand, demographics, and motivators such as service, specials, and ease of use, total customer experience, price and repatronage. Interestingly, although forecourt convenience stores charge more than supermarkets, consumers are willing to accept this in exchange for convenience. Buying trends are also changing, with people making fewer purchases more frequently, and more quickly. Because forecourt convenience stores are not known for their low prices, image is important (Molefi, 2007: 26).

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 stores. In order to maintain a competitive advantage, the role of brands in the context of convenience is important, as brand recognition makes decision-making simpler for consumers who are in a rush (Molefi, 2007: 26). Moreover, Molefi (2007:26) maintains that forecourt retailing forms part of the marketing activities of oil companies, with corporate goals being met by attracting more people to forecourts through added features and ultimately increased fuel sales. Customers are satisfied because their needs and wants are provided for through these additional convenient features.

Forecourt retailers have also begun to focus on competitions as a way to keep consumers interested in their stores, as studies show that these competitions increase the chances of repatronage and prevent brand boredom. The elasticity of repurchase intentions based on customer satisfaction in the supermarket industry is reported to be one of the highest amongst all retail sectors in the US. For this reason, it is vital for forecourt retailers to understand customer satisfaction drivers, such as quality, service and convenience (Molefi, 2007:26).

What consumers perceive the merchandise, offering, price, service of a store and other dimensions of a store to be may differ considerably from what they actually are. Whether or not a consumer patronises a store often depends on his perception of store characteristics and how they compare with evaluative criteria (Peter & Olson, 1990). A given consumer's perceptions of all the attributes associated with a store is generally referred to as the store image (Hawkins, Best & Coney, 1989) whilst Peter and Olson (1990) argue that store image is what consumers "think" about a particular store.



Hawkins et al (1989) have identified the following dimensions and components of store image:

DIMENSION	**COMPONENTS**
Merchandise	Quality, selection, style, price
Service	Sales personnel, ease of return,
Clientele	Other customers
Physical Facilities	Cleanliness, store layout, shopping ease, attractiveness
Convenience	Location and parking
Promotion	Advertising
Store atmosphere	Congeniality, excitement, comfort
Post-transaction	Satisfaction
Institutional	Store reputation

Engel, Blackwell & Minniard (1993) indicate that either limited or no research has been conducted on consumer characteristics, store characteristics, purchase intentions and choice of store at which shopping is done.

2.1.2 THE DISTINCTION BETWEEN CONSUMERS AND CUSTOMERS

The word 'customer' refers to someone who regularly purchases from a particular store or company such as Edgars or OK Stores. The term 'consumer' more generally refers to anyone engaging in activities such as the evaluation, acquisition, usage or disposal of goods and services. Therefore a customer is defined in terms of a specific firm whilst a consumer is not. The ultimate consumer is the individual who purchases for the purpose of individual or household consumption (Loudon & Bitta, 1993).

2.1.3 PERSONAL VS ORGANISATIONAL CONSUMERS

The term "consumer" can be used to describe two types of consuming entities : the personal customer and the organisational customer. According to Schiffman and Kanuk (1991), the personal consumer buys goods and services for his or her own use, for the use of the household, for only one member of the household or as a gift for a friend. The goods are therefore bought for final consumption by the individuals, who are the end users or ultimate consumers. Organisational consumers include profit and non-profit businesses, government agencies (local, state and national) and institutions (schools, churches and prisons). All of the above must buy products, equipment and services in order to run their organisations.

2.1.4 WHAT IS CONSUMER BEHAVIOUR?

Consumer behaviour includes "those decisions and related activities of persons involved specifically in buying and using economic goods and services" (Walters & Bergiel, 1989:9).

According to (Schiffman & Kanuk, 1991:5), consumer behaviour refers to "the behaviour the consumers display in searching for, purchasing, using, evaluating and disposing of products and services they expect will satisfy their needs". The American Marketing Association explains consumer behaviour entails "the dynamic interaction of cognition, behaviour and environmental events by which human beings conduct the exchange aspects of their lives" (Bennett, 1988:40).

2.1.5 THE CONSUMER DECISION-MAKING PROCESS

One point of departure in the study of consumer behaviour is the intra-individual approach, focusing on the decision-making of individual consumers. Consumer decision-making is seen as a problem solving activity and involves a number of steps. The primary decision made by the consumer is whether to purchase or not (spend or save) when engaged in a particular buying situation (Du Plessis, Rousseau & Blem: 1995).

2.1.6 WHY CONSUMERS SHOP

For some product categories, the choice of a store may be more important to the consumer than the choice of a brand and may involve a complex set of decision criteria. Consumers frequently shop from store to store for a variety of products, and the motives for shopping may be quite distinct from the motives for buying a particular product. Consumers may shop because of a desire to search for bargains or to seek social interaction with sales personnel (Du Plessis et.al. : 1995).

Dhurup (2008), Engel et.al.(1993) and Loudon & Bitta (1995) explain personal and social motives are two main reasons why consumers engage in a shopping exercise.

2.1.6.1 PERSONAL MOTIVES

2.1.6.1.1 ROLE PLAYING

Shopping activities are learned behaviour and are expected or accepted as part of one's position or role, such as mother, housewife, husband or student.

2.1.6.1.2 DIVERSION

Shopping can offer a diversion from the routine of daily life and is a form of recreation and relaxation.

2.1.6.1.3 SELF-GRATIFICATION

Shopping may be motivated not by the expected utility of consuming, but by the utility of the buying process itself. Thus, emotional states or moods may explain why and when someone goes shopping.

2.1.6.1.4 LEARNING ABOUT NEW TRENDS

The act of shopping provides consumers with information about trends and movements and product symbols reflecting attitudes and lifestyles.

2.1.6.1.5 SENSORY STIMULATION

Shopping can provide sensory benefits such as looking at and handling merchandise, listening to the sounds (for example noise, silence, soft background music) and smelling the scents.

2.1.6.2 SOCIAL MOTIVES

2.1.6.2.1 SOCIAL EXPERIENCE OUTSIDE THE HOME

Opportunities for seeking new acquaintances, encounters with friends, or just "people watching" are provided during shopping.

2.1.6.2.2 COMMUNICATION WITH OTHERS HAVING A SIMILAR INTEREST

Shopping often affords an opportunity to interact with customers or sales people having similar interests.

2.1.6.2.3 PEER GROUP ATTENTION

Certain stores provide a meeting place where members of a peer group may gather.

2.1.6.2.4 STATUS AND AUTHORITY

Shopping may provide an opportunity to attain a feeling of status and power by being waited on.

2.1.6.2.5 PLEASURE OF BARGAINING

Shoppers may enjoy gaining a lower price through bargaining, companion shopping or visiting special sales.

2.2 STORE IMAGE

2.2.1 INTRODUCTION: CHOOSING A STORE

The formation of store image is a complex process which is influenced by a variety of factors. Research suggests that the store environment (Baker, Grewal & Parasuraman, 1994: 334) and store atmospherics (Donovan, Rossiter, Marcoolyn & Nesdale, 1994: 284; Turley & Milliman, 2000: 193) influence store image.

Store image may be defined as "the way in which a store is defined in the shopper's mind, partly by its functional qualities and partly by an aura of psychological attributes" (Engel et.al., 1993:615). Consumers engage in a decision-process approach for store choice as well as for product and brand choices. A couple new to an area may face a complex decision process as new store patronage patterns are being developed, particularly for clothing or durables. On the other hand, a long-time resident or one facing a convenience-good purchase will probably have the decision process refined to more of a habitual or routinized response (Loudon & Bitta, 1995).

Research indicates consumers form images of stores by visiting the store once or twice and thereafter form a mental set of what prices will be charged for the products for which they have not yet shopped. They also form a mental set of what to expect from the personnel in the future, and whether the store will carry the products they need (Blackwell, 1996).

2.2.2 PERSONALITY AND STORE CHOICE

Schiffman & Kanuk (1991:100) define personality as "those inner psychological characteristics that both determine and reflect how a person responds to his or her environment". Personality traits may influence the choice of stores in which a consumer decides to shop. Consumers' self-confidence maybe associated with the type of retailer from which they purchase certain kinds of merchandise. For example, research for a doctoral dissertation conducted by Isaacson (1964) indicated female clothing shoppers who scored high in self-confidence felt more comfortable buying their clothing in off-price stores, whilst shoppers with less confidence favoured the traditional neighbourhood retailer.

A later study showed consumers who purchased expensive stereo equipment from audio equipment specialty stores were more self confident than consumers who purchased similar equipment from traditional departmental stores (Dash, Schiffman & Berenson, 1976). Both these studies suggest new types of retailers should try to target a more self confident market segment by appealing to the consumer's ability to recognise and properly evaluate unlabelled or specialty merchandise.

Shoppers' personalities also influence the types of sales people they prefer to serve them. Dependent shoppers may prefer an aggressive sales people who makes suggestions and takes the initiative, whilst independent shoppers may prefer a less aggressive salesperson (Schiffman: 1991).

2.2.3 FUNCTIONAL ELEMENTS OF STORE IMAGE

There are several important factors that influence consumer store-choice behaviour. Although the influence of these factors differ, depending on such variables as the type of product purchased, the type of store (such as discount, department or other) and the type of consumer, the following factors have been found to exert general influence on store choice. They include store location, physical design, assortment or range of products, prices, advertising, personnel and customer services (Engel et.al.:1993).

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2.2.3.1 STORE LOCATION

Location refers to the geographical placement of a retail outlet in a specific region or area (Dunne & Lusch, 2008: 52) in order to serve a specific target market by maximising system profitability (Levy & Weitz, 2009: 218). Location can also be used to develop sustainable competitive advantage by offering convenient locations that are easily accessible and visible, and which may be close to activity centres such as shopping centres, hotels and entertainment or office complexes (Levy & Weitz, 2009: 217).

Consumers usually select the closest store if all other things are approximately equal. The size of an outlet is also an important factor in store choice. Unless a customer is particularly interested in fast service or convenience, larger outlets are preferred over smaller outlets, all other things being equal (Hawkins, Best & Coney, 1992).

Location has an obvious impact on store patronage. Generally, the closer consumers are to a store, the greater their likelihood to purchase from that store. The further away consumers are from a store, the greater the number of intervening alternatives, and thus the lower the likelihood to patronize that store (Loudon & Bitta, 1995). Convenience filling stations have hence attempted to leverage off existing infrastructure as well as render services which larger shopping centres are unable to provide.

The size of the petrol station and the number of pumping bays available is an indication of the convenience of filling at a particular station (Smalley, 1999). Customer convenience is an important variable that has a significant influence on sales volume. Although there a many variables influencing customer convenience, one important factor is the number of pumps that can refuel cars. This provides an indication of the number of cars that can refuel without negatively affecting the traffic flow on the site or delay the refueling time.

Customers do not like to wait to refuel and tend to avoid stations where back up problems exist (Smalley, 1999). The number of pumping bays may provide a good indicator of the number of cars that can refuel without causing back up problems and provide an indicator of the volume of petrol that may be sold. Chan *et al.,* (2005) also confirmed that station characteristics such as the number of pumping bays affects the market share of a particular fuel station and, therefore, the fuel demanded by customers.

Research indicates for a convenience item or minor shopping good, consumers are unwilling to travel a considerable distance for such items (Papadopoulas: 1980 & Williams: 1981). Further studies indicate where high involvement purchases such as cars, or specialty items such as wedding dresses are involved, there is a greater willingness amongst shoppers to travel greater distances (Hawkins et.al.: 1992).

Loudon & Bitta (1995) postulate there are three factors associated with the choice of store which a customer chooses to patronize. They are intercity choice, intracity choice and intrastore choice. The location of any retail business is an important factor affecting the performance and success of that business (Chan, Padmanabhan & Seetharaman, 2005). Location may be important in relation to fuel retail stations if there is a correlation between the location of fuel stations and the demand for fuel. According to Chan *et al.* (2005), the demand for petrol can be expressly linked to local geographical and demographic factors such as; population, median income, number of cars, proximity to airport, downtown and highways.

The location of a fuel retail station in a rural area, for example, should influence a lower demand for petrol than an urban area due to a lower population, lower median income, fewer cars, and poorer proximity to an airport. In this regard, PTT Oil of Thailand indicated that it would close 300 petrol stations in unprofitable locations in rural areas. A long distance between fuel service stations, however, increases the volume of petrol and diesel sold (Hillingdon Times, 2006). In this regard, a review of rural petrol stations in Scotland indicated that, to be viable, these stations should be more than 8 miles to the next petrol station or more than 30 minutes drive from the edge of a town with a population of 30 000 or more (Scottish Executive Publications, 2006 and Siam Future Development PLC, 2006).

Another important location factor that could affect fuel demand is the accessibility of the site to customers (Lee & Schmidt, 1980). Street intersection sites and corner sites are preferred locations as they offer better access, improved visibility and higher traffic volume (Lee & Schmidt, 1980) and a signalised intersection improves access into and out of the fuel station (Smalley, 1999). Finally, customers prefer fuel retail stations that are close to work and home and convenience and accessibility to enter and exit is becoming increasingly important (Blum, Foos & Guadry, 1988; Smalley, 1999; Bainbridge, 2000 and Chan *et al.,* 2005).

The proximity of a fuel retail station to major routes may also be an important driver of fuel demand (Netz & Taylor, 2002). In this regard, customers attempt to reduce travel time and distance when commuting or traveling longer distances and, therefore, select fuel retail stations which are in close proximity to these routes (Chan *et al.,* 2005). This should be especially valid in South Africa where here is no price differentiation and, therefore, no incentive to travel any further than necessary. Therefore, fuel retail stations located near major routes and highways on route to work or home are more exposed to passing traffic and should have a higher demand for fuel then fuel retail stations located in residential areas (Bainbridge, 2000; Netz & Taylor, 2002).

2.2.3.1.1 STORE CONTACT

Peter & Olson (1987) discuss the concept of "store contact", that is, the task of retailers to get consumers into the store where a purchase can take place. This involves locating the outlet, traveling to the store and entering the outlet.

A factor affecting the probability of store contact involves the nature of the consumers in their roles as shoppers. Some individuals may enjoy the process of shopping and spend many hours looking in stores, whilst others may see it as a burden. Some shoppers may also be primarily price oriented and prefer low-price outlets (Hawkins et.al.:1989).

Molefi (2007: 26) argues that there are a range of factors which theoretically could influence spending patterns at forecourt convenience stores. These factors include: the experience of customers from they drive off the road into the parking lot, their interaction with the sales staff, their perception about the store layout and ambience and their subsequent departure from the store. There are many strategies used to increase the probability of store contact. This may be where shoppers will be able to locate a particular outlet and retailers choose locations in high-traffic areas with ample parking. Tactics may also be used to get the potential consumer physically into the store. Frequently advertised sales, sales signs in store windows, sounds (such as music) and smells (such as popcorn) may be used for this purpose.

2.2.3.1.2 TOWNS AND TRADING AREAS

Research has been conducted to explain the impact of the location of a town, city or trading area. Recent research by Ghosh & Rushton (1987) indicates the income of shoppers, the merchandise assortments in two cities and consumer preferences are some variables that influence the shopper's choice of trading area.

The product category may also influence how far people will travel. Consumers will travel longer distances for clothing than for household goods or products they can purchase locally (Engel et.al.:1993).

2.2.3.2 PRICE

The price level of a store is a determinant of store image. The perceived or psychological price may differ from the actual price. Consumers often form their image about a store's prices more on the basis of advertising, displays and the physical layout than from the actual price level of the store (Engel et.al.: 1993).

The importance of price as a determinant of store patronage varies by the type of product. At one time price was not so important in consumer selection of department stores, which built their consumer franchise on product selection and service. Due to intense competition and often because of deterioration in service levels, price has become more important for some department stores.
The importance of price depends on the nature of the buyer. Some customers preferring a factor, such as convenience, will in effect trade off that consideration against higher prices (Williams, Painter & Nicholas, 1978:27-42).

Communities provide examples of retailers and service providers that are the most successful in the trade area. Frequently, these successes are not due to having the lowest prices, however, they may have some of the highest in prices. Alternately, retailers and service providers such as airlines that are near bankruptcy sometimes slash prices in an attempt to attract customers. It is presumptuous to assume price is the determinant attribute of where consumers shop. The mistake may be understandable because past analysis places primary attention on price. The reality of retailing is that low prices may attract consumers but it will not keep them unless other attributes such as convenience, location, product selection and service are acceptable (Engel et.al., 1993).

Levy and Weitz (2009: 413) maintain that this is particularly significant in retailing since customers are well informed and they have a variety of alternatives to choose from. They postulate that retailers need to examine four issues which play a significant role in the setting of price:

- The price sensitivity of the consumer that in times of economic sensitivity tend to increase;
- The costs associated with the products and services provided to the consumer;
- The direct and indirect competitors' activities; and
- The legal issues pertaining to pricing.

Molefi's research (2007: 26), however, suggests that the decision to patronise a convenience store removes pricing from the equation as convenience relates more to speed of service and ability to shop at any time.

2.2.3.3 ADVERTISING AND SALES PROMOTION

Advertising is a quasi-evaluative criterion. It is any "paid, non-personal presentation of information about a product, brand, company or store" (Peter & Olson, 1987:528). Much advertising is done to influence consumers' cognitions such as their images, attitudes and beliefs towards products, brands and behaviours.

Sales promotions on the other hand refer to direct inducements to the consumer to make a purchase (Jocz, 1984). Retail advertising does not have a consistent impact but instead appears to vary in influence, depending on product and store type.

Advertising can fulfill any of these three goals:

- To inform customers, such as for a new store opening.
- To pursuade customers that they should patronize a certain store or buy a particular brand.
- To remind customers of the store that they are appreciated.

Advertising can also be highly influential in cultivating a store image in consumers' minds (Loudon & Bitta, 1995).

2.2.3.4 STORE DESIGN AND PHYSICAL CHARACTERISTICS

Store design and display focus on creating an environment which encourages the consumer to enter the store, helps customers locate merchandise easily, spend time in the store and enjoy the experience while making unplanned impulse purchases (Dunne & Lusch, 2008: 432-433). The physical attributes of a store affect consumers' perceptions of other store characteristics. The materials used on the exterior and interior, the kind of floors, the type of displays, the lighting and air-conditioning and the type of music played are some factors affecting the image of a store (Engel et.al.: 1993).

The design characteristics of a store visibly reflect its image and can dramatically influence patronage. Many consumers appear to "size up" a store based on its outward appearance of architecture and signs and hence are drawn to the store or repelled by it, based on their perception of whether this store looks "right" for them. Interior design such as store layout, aisle placement and width, carpeting and architecture, as well as physical facilities in a store, including elevators, washrooms and emergency exits, influence store assessment by consumers (Dunne & Lusch, 2008: 432-433).

Quality of the store surroundings, or ecological design, may affect the consumer's mood state at the point of purchase. This in turn may influence purchase behaviour, brand evaluation and information acquisition (Hawkins et.al.: 1989). Retailers also use store design to reinforce its strategy by meeting the needs of the target market and offering sustainable competitive advantage (Levy & Weitz, 2009: 538).

2.2.3.4.1 ATMOSPHERICS

Atmospherics is "the conscious designing of buying environments to product specific emotional effects in buyers that enhance their purchase probability" (Loudon & Bitta, 1995:543). Loudon and Bitta (1995) illustrate the importance of atmospherics by the following:

Large department stores often operate a bargain basement selling lower-priced lines of merchandise of marked-down items for customers pursuing bargains. The atmosphere is typically stark and functional, with narrow aisles, harsh lighting and counters loaded with chaotically arranged merchandise which reinforces the bargain-image. Not only are the non-person atmospheric elements of the retail store important (such as self-space, in-store point-of-purchase promotion, lighting, noise, aisle design and square footage), but also the atmospherics created by shoppers within the retail store (Engel et.al.:1993)..

One of the intended or unintended products of various current merchandising emphases is retail crowding. This store atmosphere consequence is a result of high-density shopping environments, such as regional stores and hyper stores, as well as population shifts and concentrated shopping hours for working families. The result of such perceived crowding is to systematically affect shopping behaviour and consumer feelings about retail outlets and shopping trips Loudon and Bitta (1995).

Another illustration of the significance of atmospherics and consumer mood is found in the use of in-store music. If retailers can positively affect their customer's mood at the point of purchase, the customer may be more responsive to in-store merchandising programs. Positive mood also increases the time spent in a store and the consumer's willingness to interact with salespeople Loudon and Bitta (1995).

Music can play an important role in a store's atmospherics by gaining customer attention, or conveying a certain image, or establishing a particular emotion that increases the likelihood of purchase. Research on the benefits of in-store music shows it can have a positive impact on a customer's predisposition to buy, the amount of time a shopper spends in the retail environment, the amount spent by the customer when purchasing, and the consumer's perception of the quality of the shopping experience (Engel et.al.:1993).

Hawkins et.al. (1989) suggest the following guidelines can be used to create an appropriate store atmosphere:

- Long supermarket aisles should be replaced with short aisles in a honeycomb-maze arrangement. The shopper will then encounter aisle-ends that are eye-catching places to display products.

- More interior walls should be installed. This will help organize products by category and the available display space will be increased by twenty five percent.

- Brightly-coloured interior walls should be painted beige and neutral-coloured carpets should be installed. Whilst rainbow hues and patterns may look attractive as a backdrop, they otherwise detract from the merchandise.

2.2.3.4.2 SIGNS AND PRICE INFORMATION

In-store signs are useful for directing consumers to particular merchandise and for offering product benefits and price information (Peter & Olson, 1987). An experiment conducted by McKinnon, Kelly & Robison (1981) investigated the use of signs, the type of message included on the sign and the effects of a regular versus a sale price being included on the sign (price-only or product-benefit). The six products studied were bath towels, ladies' slacks, stockings, men's dress slacks, men's jeans and men's shirts. All six products were studied in varying conditions over a three-week period in three department stores.

The results suggested at regular prices a benefit sign should be the only type used, whilst at a sale price, both a price only and a benefit sign will increase sales over a no-sign condition. Therefore the results support the idea that signs affect consumer cognitions (consumers apparently processed different sign information and sales increased with the use of certain types of signs).

2.2.3.4.3 COLOUR

Colour has been shown to have a variety of physical and psychological effects on both humans and animals. Bellizzi, Crowley & Hasty (1983) examined the effects of colour on consumer perceptions of retail store environments in a laboratory experiment. They concluded colour can have customer drawing power as well as image-creating potential. It was noted consumers were drawn to warm colours such as red and yellow, but cool colours (blue and green) did not draw consumers, although they were rated as pleasant.

2.2.3.4.4 SHELF SPACE AND DISPLAYS

Research supports the idea that more shelf space and in-store displays increase sales. A study by Wilkinson, Mason and Paksoy (1982) examined the impact of these two variables on the sales of four grocery products in an in-store experiment. Comparisons were made between normal (regular shelf space), expanded (double the regular shelf space allocation and special display (regular shelf space plus special end-of-aisle).

Although the results varied by product, both shelf space and displays consistently increased sales for all of the products. Special displays also consistently outperformed expanded shelf-spaces. These results support the idea that the presentation of merchandise in store has an important effect on consumer behaviour and on the choice of the store.

2.2.3.4.5 DECOR

The decor in modern shopping centres has a psychological effect on customers and can create a feeling of acceptance or resentment by those who are exposed to it. Decor consists of varied elements: shapes, materials, colours, textures of floors, walls, ceilings, signs, storefronts and lighting. Features such as kiosks, sculptures, artwork, directory signs, fountains, landscaping, seating areas, hanging decorations, graphics, telephone booths, emergency exits, fire hose cabinets all constitute decor (Lion:1976).

2.2.3.4.6 STORE DESIGN CONVEYS STORE IMAGE

In an article entitled "Seriously Setting Up Shop", Peter Dodson, food merchandising director of OK Stores, found "the store rentals were very competitive in terms of rands per square metre, but the stores were too large and the trading density was wrong" (Bierbaum:1995). He discovered OK Stores was producing five thousand rands a square metre, while Shoprite Checkers ten thousand rands and Pick and Pay about eighteen thousand Rands. Food was bringing in fifty three percent of sales at OK Stores, but only has twenty seven percent of the floor space.

The solution therefore lay in a major redesign of the OK Stores - their layout and interior decor. The food and their checkouts were brought out from the back of the store and given prominence so that “it looked like a supermarket”. Housewares and textile, in the front of stores, were been combined with foods and moved further back. Furniture was separated and allocated an area down the side of the store. Dodson comments, “We had to establish that it is a food business that happens to sell other lines as well. In the past there was no clear understanding of what market the store was in. They saw the chain as being a mass market dealer, not in food, but in all four: food, housewares, textiles and furniture. It was run as a general dealer.”

Food makes up sixty eight percent of sales at OK Stores. Although the margins are smaller on food, Dodson believes it is the main reason why people will come into the store; that the lower margins are compensated for by the higher turnover that the core business will bring in if it is properly managed.

The store layout was done at minimal cost but the ongoing redesign of shopfronts and interiors - some of which had not been done for 30 years - was a large investment. It seemed the former management thought there was no need for a store ambiance. The new board thought Dodson’s plans were a little too upmarket, but he insisted: “Research has shown that people anywhere want to be afforded the dignity and respect when they go into what is not necessarily a joyful experience.”

The most major change will be what Dodson has classified as “convenience” stores - those under two thousand square metres. They will have special light fittings, painted pillars and friendly gondola ends. The supermarkets - stores between two thousand and four and a half thousand square metres - will also be upgraded but without the finer details. Likewise, the superstores, those over 4 500 square metres, and the multilevel stores.

2.2.3.5 PRODUCT ASSORTMENT OR RANGE

The product assortment element has to do with the goods and services offered by a retail outlet. There are five attributes considered to be important here: quality, selection or assortment, styling or fashion, guarantees and pricing. Research experiments and surveys have previously indicated stores offering either a deep assortment or a wide variety of product lines are preferred over stores having medium depth or breadth of assortment (Alderson & Sessions: 1982).

With the trend in retailing toward much of the same merchandise being sold in a variety of mass outlets, the products purchased no longer determine where the buyer shops. For example, grocery and household products were once the province of supermarkets but are now bought in many outlets ranging from food stores, warehouse and discount stores. For this reason price, convenience and demographics are now strong determinants of store choice. (Loudon & Bitta: 1995).

2.2.3.5.1 NATURE AND QUALITY OF ASSORTMENT

Depth, breadth and quality of assortment are often determinants of store choice. This is especially true for department stores and those in shopping centres. Specialty stores have risen rapidly in competitive positions because of their ability to assemble and present dominant assortments, whether defined on the basis of classification, end-use or lifestyle (Levy: 1987).

The assortments of merchandise are also important for the increase in retailers known as "category killers". They carry a broad assortment of one category of merchandise. An example is Toys R Us with hundreds of stores spread from Germany to Hong Kong. Its most profitable stores are not in the United States of America, where it is very strong, but in Germany. In 1992, it had a highly publicized store opening in Japan and has added nearly one hundred new units each year.

An alternative strategy for capitalizing on consumers' desires for quality or depth of assortment is found among niche retailers. These include Benetton, The Gap, Aca Joe, Esprit and many others. These companies have narrow but deep product assortments (Engel et.al., 1993:617-618).

2.2.3.6 STORE PERSONNEL AND CLIENTELE

Some studies document the importance of store personnel in the consumer's choice of a store. Previous studies have indicated that various characteristics of sales personnel, including politeness, courteousness and product knowledge are often used as criteria in evaluating and choosing some stores (Hawkins et.al.:1989).

Sales personnel also affect a store's image. A store sometimes takes on the character of the clerks, stock personnel and that management who are seen by customers. The way clerks react to customers sometimes characterises a store as friendly, impersonal, helpful, up-to-date or disinterested (Engel et.al.: 1993).

There is a relationship between consumers' store choices and their social class membership. Consumers will tend to patronize those stores where persons similar to themselves are perceived to be shopping (Loudon & Bitta: 1995).

2.2.3.7 THE SERVICE ASPECT

Customer service includes the set of activities and programmes undertaken by retailers to make the shopping experience more rewarding for the customers (Levy & Weitz, 2009: 539). In this regard, retailers make use of customer service to differentiate their offerings, build customer loyalty and develop sustainable competitive advantage by providing information about the retailer's products and making it easy for customers to locate and purchase their products (Dunne & Lusch, 2008: 393).

According to Graham (1995:14), a new definition of customer service is emerging: "one that goes beyond doing it right the first time, providing communication excellence, on-time deliveries and being responsive to individual customer requirements". There will be an endeavour for service in the 1990's to be representative of this view. If customers do not receive this kind of service, then they will go elsewhere to do their shopping. What this means is the lowest prices will not be enough to keep customers, a company has to provide more than that. Effective customer service today must be equated with knowledge, information and expertise.

The role of service as an evaluative criterion seems to vary amongst both consumers and products. A study on the purchase of new cars indicated the expectation of good service is amongst the least frequently mentioned factors that buyers say caused them to select a dealer. Service is one of the least frequently mentioned dealer characteristics considered by buyers of major appliances (Engel et.al.: 1993).

Graham (1995) distinguishes between five important implications in the service concept.

- "Price may attract customers but information sustains relationships". Although price is important to customers in getting them in the door, that alone does not hold them or keep them coming back. When consumers need more than just the product or service, they will go where they can obtain beneficial, helpful information.

- "Doing it right may please customers, but helping them achieve their goals keeps them". Efficient, helpful, rapid service makes people feel a business recognises the customer's importance. But simply being an outstanding supplier or vendor is only the beginning. Value comes from making a continuing contribution to customer's success.

- "Being on the cutting edge may be the correct positioning, but being viewed as a valuable resource produces long-term confidence". If a company is perceived as somewhere other than on the cutting edge, it may not be considered to receive attention. Proper positioning should be viewed as the starting point and not the goal. The major challenge for an organisation is to have customers and prospects wanting to do business with them because their knowledge is valued.

- "The right products and services keeps business coming but shared expertise attracts the right customers". Every business targets specific customer groups, whether it is business-to-business or the consumer market. Yet, most businesses complain they are never able to attract the right customers - the ones they really want and can best serve. The only way to solve the problem is for companies to become recognised for their knowledge. The correct knowledge produces and attracts the right customers.

Retail stores may offer numerous services in order to attract customers. One scheme classifies services according to those which:

- Increase product satisfaction (such as credit, alterations, installations and shopper information).
- Increase convenience (such as delivery, telephone ordering and parking).
- Provide special benefits (such as gift wrapping, product returns and complaints offices) (Loudon & Bitta: 1995).

Convenient self-service facilities, ease of merchandise returns, delivery, credit and overall good service have all been found to be considerations affecting store image. This varies, depending upon the type of outlet and consumer expectations (Engel et.al.: 1993).
Stores better their technology, personnel and training in order to increase service and decrease the time consumers spend in waiting at the checkout or other places in the store (Hummell & Savit, 1988:50-55).

2.2.4 THE IMPORTANCE OF STORE ELEMENTS

How important are each of the above elements when customers make store-choice decisions? It depends on the store type. Department store shoppers seem to be concerned about the quality of the store's merchandise, the degree of ease of the shopping process and post-transaction satisfaction. Grocery shoppers are concerned about the store's merchandise mix, ease of the shopping process and the cleanliness of the store (Loudon & Bitta: 1995).

2.2.5 SUMMARY

A comprehensive review of the literature relating to the functional elements of store image, that is, those factors taken into consideration when consumers choose a store to shop at has been discussed. Where possible, reference is made to areas in which research has been conducted on these various elements.

CHAPTER THREE
SAMPLING TECHNIQUES AND THE RESEARCH DESIGN

3.1 INTRODUCTION

A literature review was undertaken on the functional elements of store image - general store characteristics, store location, store physical characteristics, product range, prices charged, store personnel, advertising and customer services. An empirical analysis will now be conducted to test the effects of store image on consumer purchases.

This incorporates an analysis into the objectives of the research, the sampling technique used and a description of the research sample. The procedure followed in executing the research and a description of the research instruments (data collection methods) is explained.

3.2 RESEARCH OBJECTIVES

The core objectives of this research include, inter alia,

- To determine whether a relationship exists between store choice and each of the biographical variables (age, gender, home language, population group and income) respectively.

- To compare and contrast the choice of stores on each of the functional elements of store image (general store characteristics, store location, store physical characteristics, product range, prices charged, store personnel, advertising and customer services).

- To correlate each of the biographical variables (age, gender, home language, population group and income) with the functional elements of store image (general store characteristics, store location, store physical characteristics, product range, prices charged, store personnel, advertising and customer services).

Through this research, it is hoped that store management can change certain attributes to develop a more favourable image, since developing a consistent store image is a common goal of many retailers. This can be done by coordinating the various aspects of store image to appeal to a specific market segment (Peter & Olson: 1987).

3.3 SAMPLING TECHNIQUE AND DESCRIPTION OF THE SAMPLE

The population for the study comprised all the consumers using Engen convenience stores in the Western Cape. Huysamen (1994:38) defines a population as encompassing "the total collection of all members, cases or elements about which the researcher wishes to draw conclusions" (p. 38). A sample, on the other hand, constitutes a subset of this population. Conclusions are, thus, drawn from the sample and are generalized to the population as a whole (Sekaran, 2000). Sekaran and Bougie (2011:295) define a population as "the entire group of people, events or things of interest that the researcher wishes to investigate".

From this population, a sample of 246 consumers in the Western Cape was studied. A sample can be regarded as "a subset of the population. It comprises some members selected from the population" (Sekaran & Bougie, 2011:296).

This research study was done using a non-probability sampling design. Non-probability samples rely on the judgment of the researcher. According to Martins, Loubser & van Wyk (1996), there is no way of estimating the probability that any element will be included in the sample, and therefore there is no method of finding out whether the sample is representative of the population. This study was undertaken using the convenience sampling technique.

3.3.1. CONVENIENCE SAMPLING

For the purposes of the present study, the population was comprised of all the patrons at Engen convenience stores. In drawing the sample, it was decided to make use of a non-probability sampling design in the form of convenience sampling. Non-probability sampling implies that the elements in the population have no probabilities attached to their being selected as sample subjects (Sekaran, 2000).

Convenience sampling involves collecting information from members of the population who are most easily accessible and conveniently available to provide the desired information. It is quick, convenient and less expensive than most other sampling techniques. The disadvantage is that the results are not generalisable, except to the extent to the consumers which are represented in the research (Sekaran & Bougie, 2011).

Convenience sampling, as a form of non-probability sampling, involves taking all cases on hand until the sample reaches the size desired (Bless & Higson-Smith, 1995). The sample thus, comprises those population elements that can be studied with the greatest convenience (Sekaran, 2000; Steyn, Smit, Du Toit, & Strasheim, 1994). This design was primarily selected due to the advantages attached to its use. Convenience sampling is relatively uncomplicated, inexpensive, not time-consuming, and is free of the statistical complexity inherent in probability sampling methods (Bailey, 1987; Huysamen, 1994; Sekaran, 2000).

In deciding on the size of the sample to be drawn, the following issues were borne in mind. Firstly, the sample had to be representative of the population of interest, and had to be large enough to allow for precision, confidence and generalizability in the research findings. It is further pointed out by Sekaran (2000) that sample sizes of between thirty and five hundred subjects are appropriate for most research. The eventual convenience sample of two hundred and forty six (246) subjects meets the previously stated requirements. That is, the sample size is between thirty and five hundred, is large enough to be representative of the population of seven hundred employees, and is several times larger than the number of variables included in the study. The sample was, therefore, considered suitable for the purposes of the present research investigation.

Martins et.al. (1996) emphasize that convenience sampling is a useful tool in the exploratory phase of a research project, a phase in which ideas and insights are more important than scientific objectivity. The comparison of the sample may be analysed in respect to age, gender, home language, population and income.

3.3.2 SAMPLE COMPOSITION

Figure 3.1: Age distribution

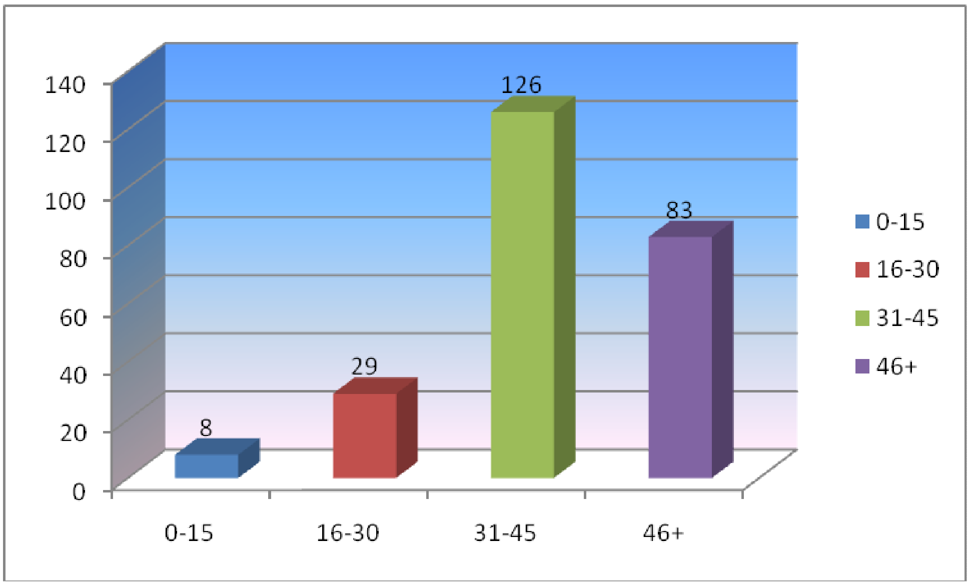
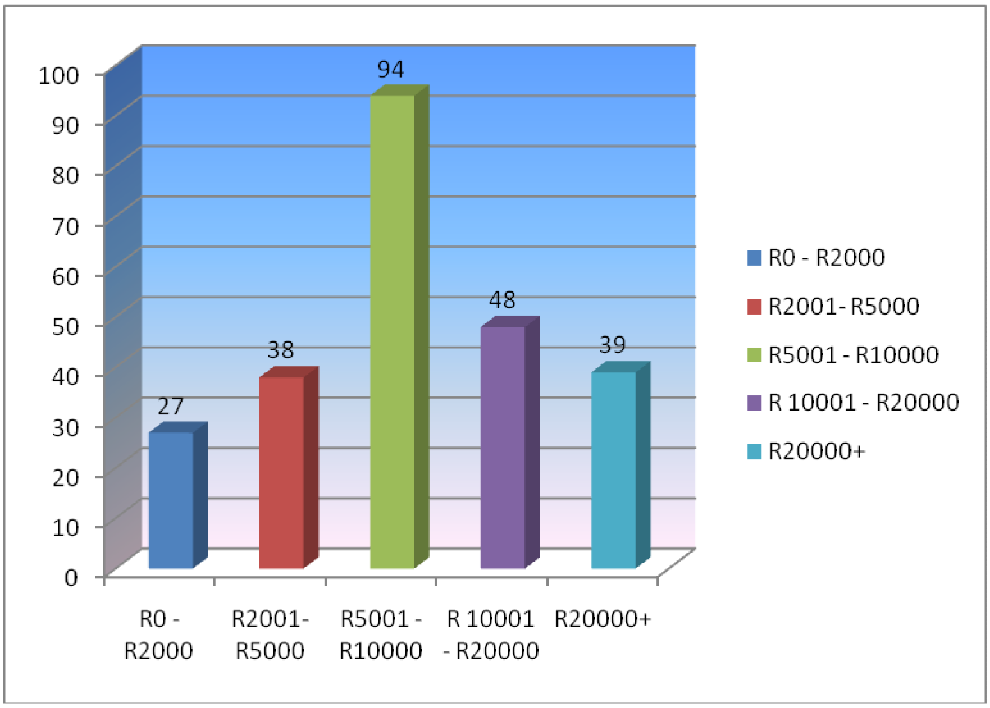


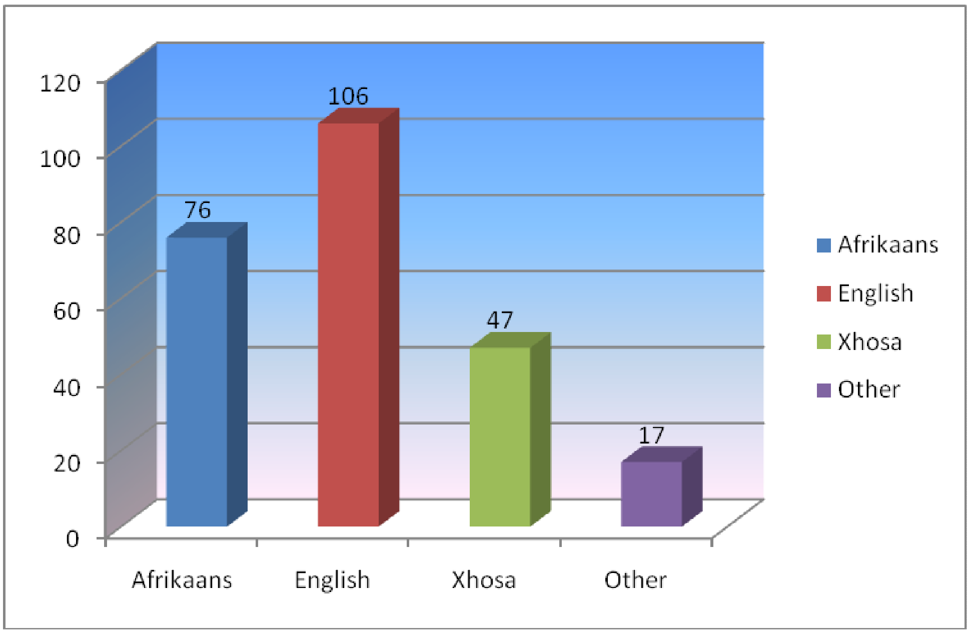
Figure 3.1 indicates that only 3% (n=8) of the respondents was in the age group 0-15 years, while a further 12% (n=29) was in the age group 16-30. While the majority of the respondents, that is 51% (n=126) was in the age group 31-46, the remaining 34% (n=83) were older than 46 years of age.

Figure 3.2: Income distribution



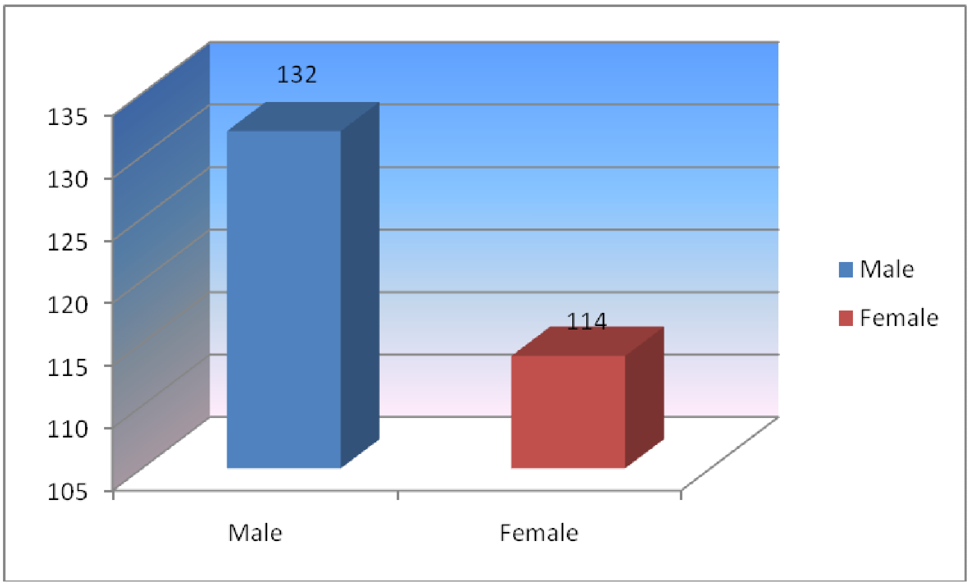
With respect to income distribution, it may be seen that 38% of the sample (n=94) earns between R5001-R10000, with a further 20% (n=48) earning between R10001-R20000. While 39 respondents (n=16) earned over R20000, and 38 respondents earned between R2001-R5000, only 11% of the respondents (n=27) earned less than R2000.

Figure 3.3: Home Language



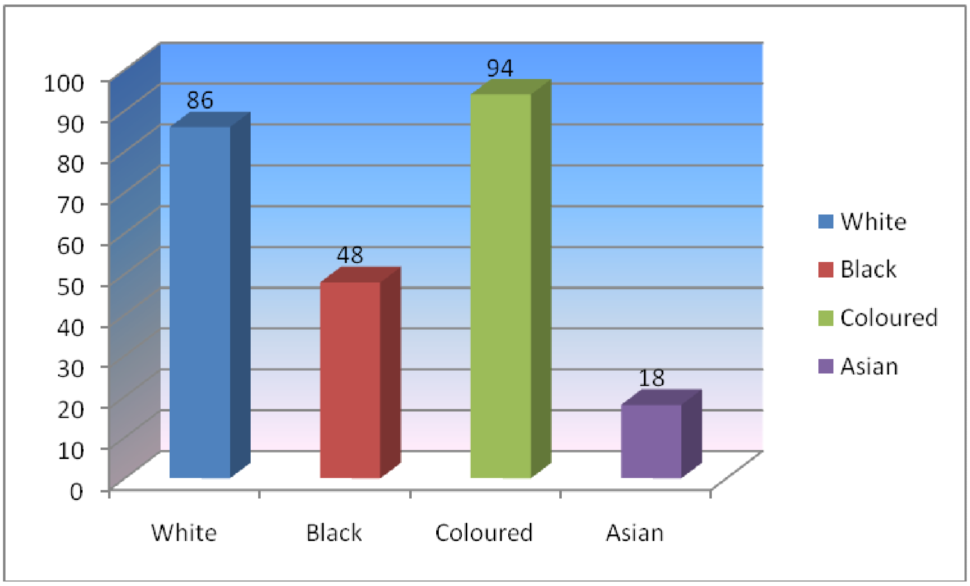
The language which was spoken by the majority of the respondents is English which comprised 43% of the respondents' home language (n=106). Afrikaans speaking respondents comprised the second largest group and constituted a further 31% (n = 76). Moreover, those that speak Xhosa comprise 19% of the respondents (n=47), with the remaining 7% (n=17) speaking other languages.

Figure 3.4: Gender distribution



Male respondents comprised 54% of the respondents (n=132), and female respondents comprised the remaining 46% of the respondents (n=114).

Figure 3.5: Race distribution



Coloured respondents represented the largest proportion of respondents in that they comprised 38% of the group (n=94). This was followed by 35% of the group being made up of white respondents (n=86), and 20% (n=48) comprising of black respondents. Asian respondents constituted the smallest group, consisting of 7% of the sample (n=18)

3.4 THE RESEARCH INSTRUMENT

The data collection method involved the development and use of a structured questionnaire which was based on a literature review. A questionnaire can be defined as "a preformulated written set of questions to which respondents record their answers, usually within rather closely defined alternatives" (Sekaran & Bougie, 2011: 300).

Martins et.al. (1996) identify three related goals that questionnaires are designed to achieve:

- To maximise the relevance and accuracy of the data.
- To maximise the participation and cooperation of target respondents.
- To facilitate the collection and analysis of the data.

3.4.1 ADMINISTRATION OF THE QUESTIONNAIRE

Three hundred questionnaires were distributed to shoppers in convenience stores. The aim was to establish the consumer's perceptions of and attitudes to particular store dimensions and their choice of store. These dimensions were broken down into a number of store attributes such as the selection of products and the prices charged by the store; as well as service dimensions.

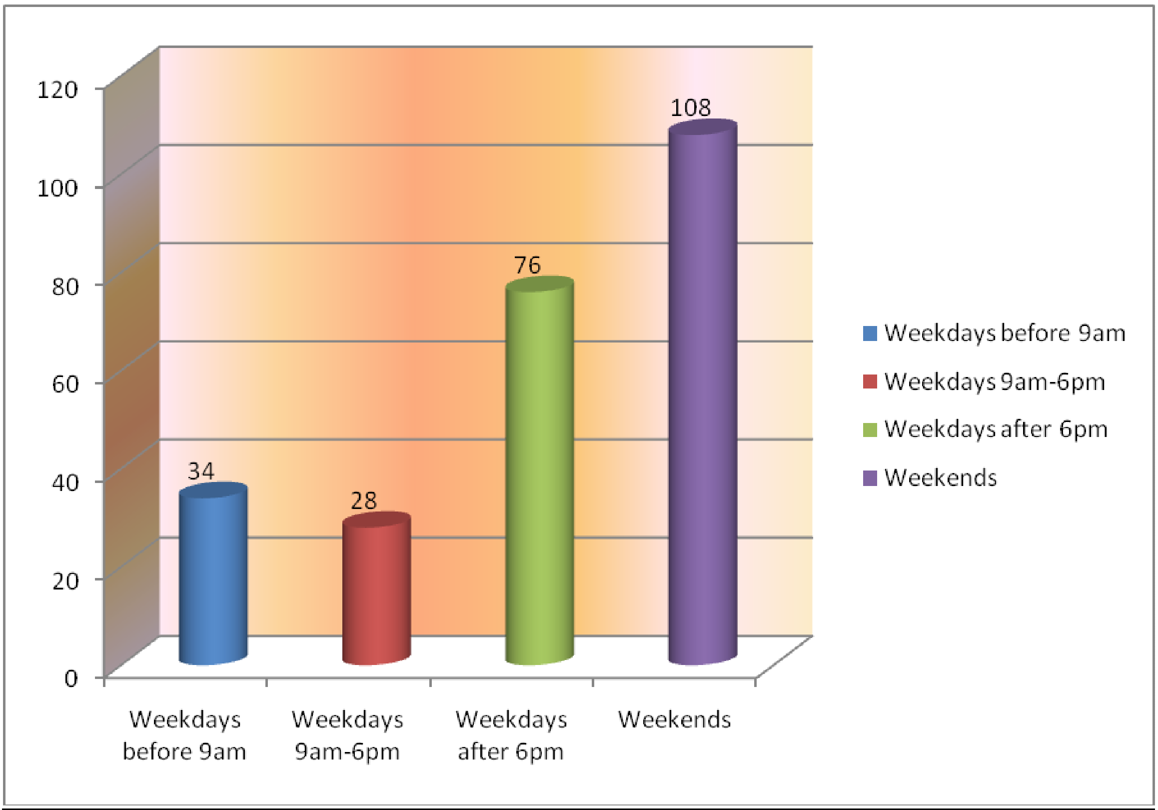
3.4.2 FUNCTIONAL ELEMENTS OF STORE IMAGE

Early research on the determinants of store image was conducted by Engel et.al.(1968). Peter & Olson (1987) also researched this topic and together the following elements of store image were delineated:

- Price
- Advertising
- Product and Service Range
- Store Personnel
- Store Clientele
- Physical Attributes
- Location
- Customer Services

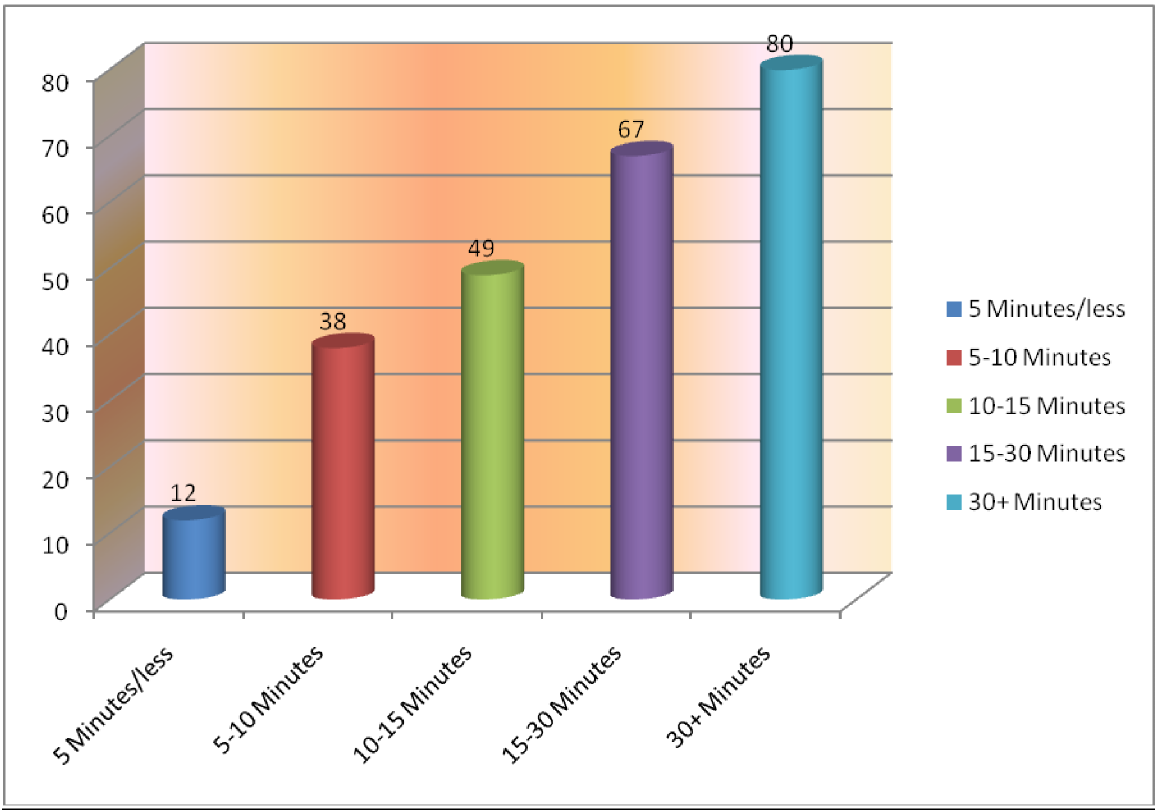
Patrons were asked a range of questions relating to the time of their visit to a garage convenience store as well as other questions relating to the services they utilized.

Figure 3.6: At what time of the day do you usually visit the convenience store?



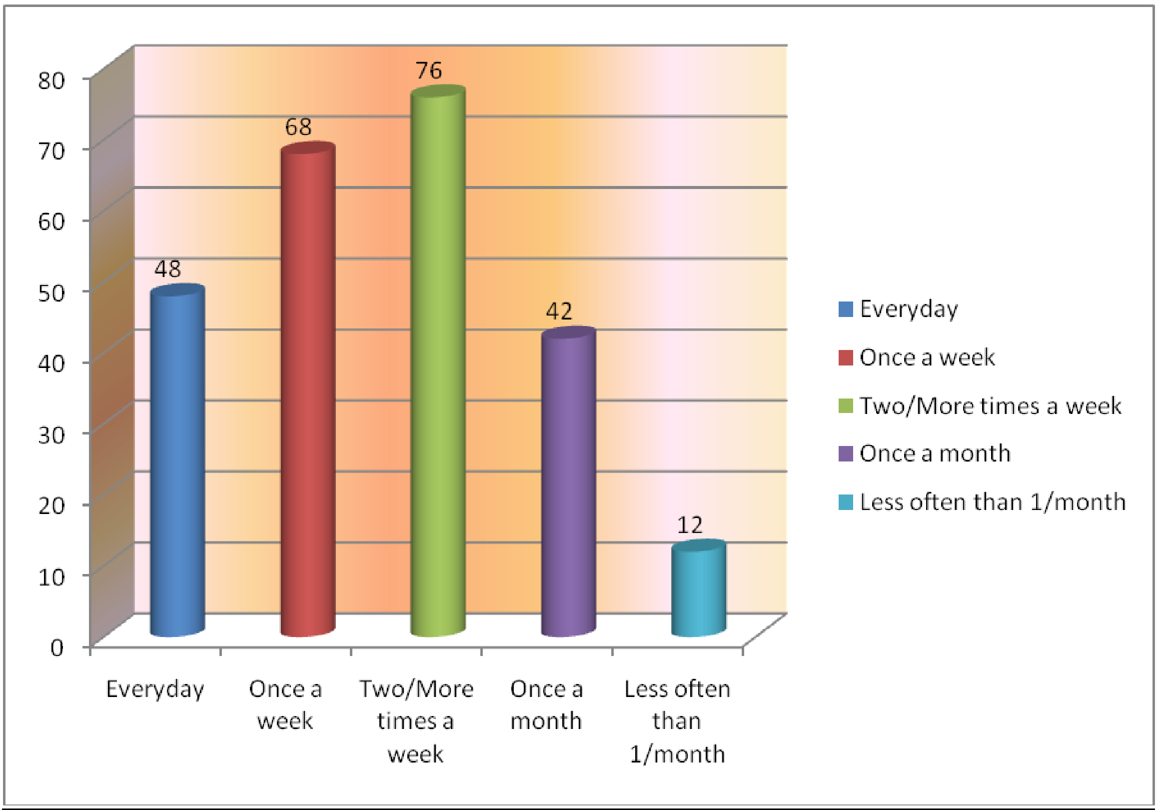
The largest proportion of respondents, that is 44% (n=108) indicated they were most likely to visit a convenience store over the weekend, with a further 31% (n=76) indicating that they visited convenience stores primarily during weekdays after 6 pm. A further 14% (n=34) visit garage convenience stores weekdays before 9 am and the remaining 11% (n=28) indicated that they visited weekdays between 9 am and 6 pm. This trend suggests that patrons were likely to visit convenience stores after work or over weekends more so than during the week during office hours.

Figure 3.7: How long does it usually take you to get to the convenience store?



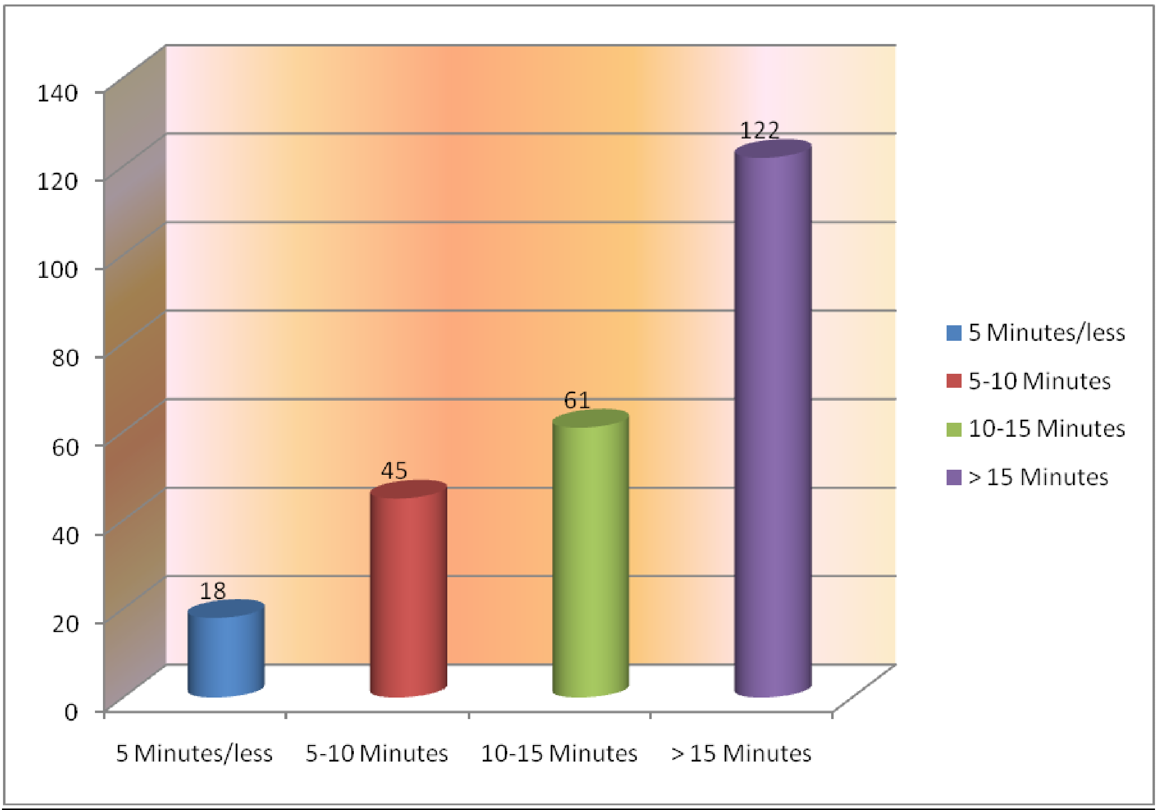
Thirty-three percent (33%) of the respondents N=80) indicated that it took them more than 30 minutes to travel to a convenience store, with an additional 27% (n=67) indicating that they took 15-30 minutes to get to a convenience store. It appears that, despite the distance travelled to a convenience store, the convenience is likely to play a role in store choice.

Figure 3.8: How often do you visit an Engen Garage?



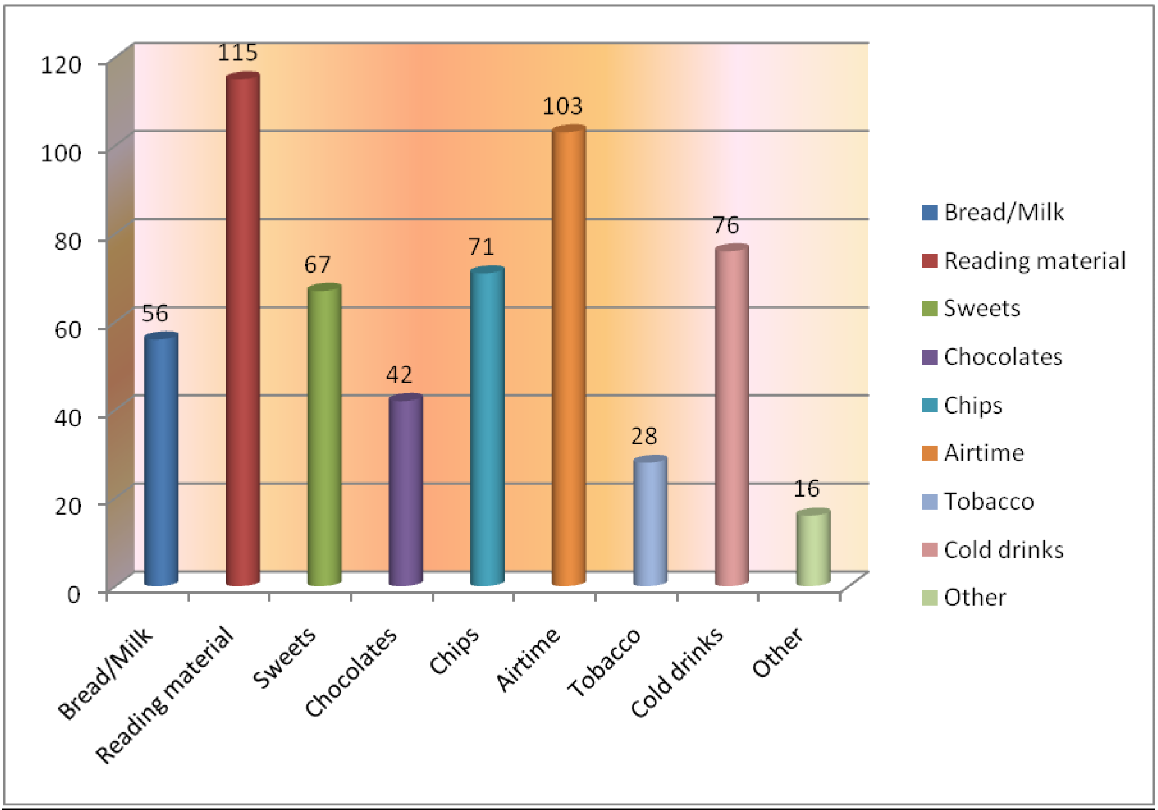
It appears that patrons visited convenience stores twice or more times a week (n=76), once a week (n=68), everyday (n=48) and once a month (n-42), although only 12 respondents visit convenience stores less often than once a month.

Figure 3.9: How much time do you usually spend inside the convenience store?



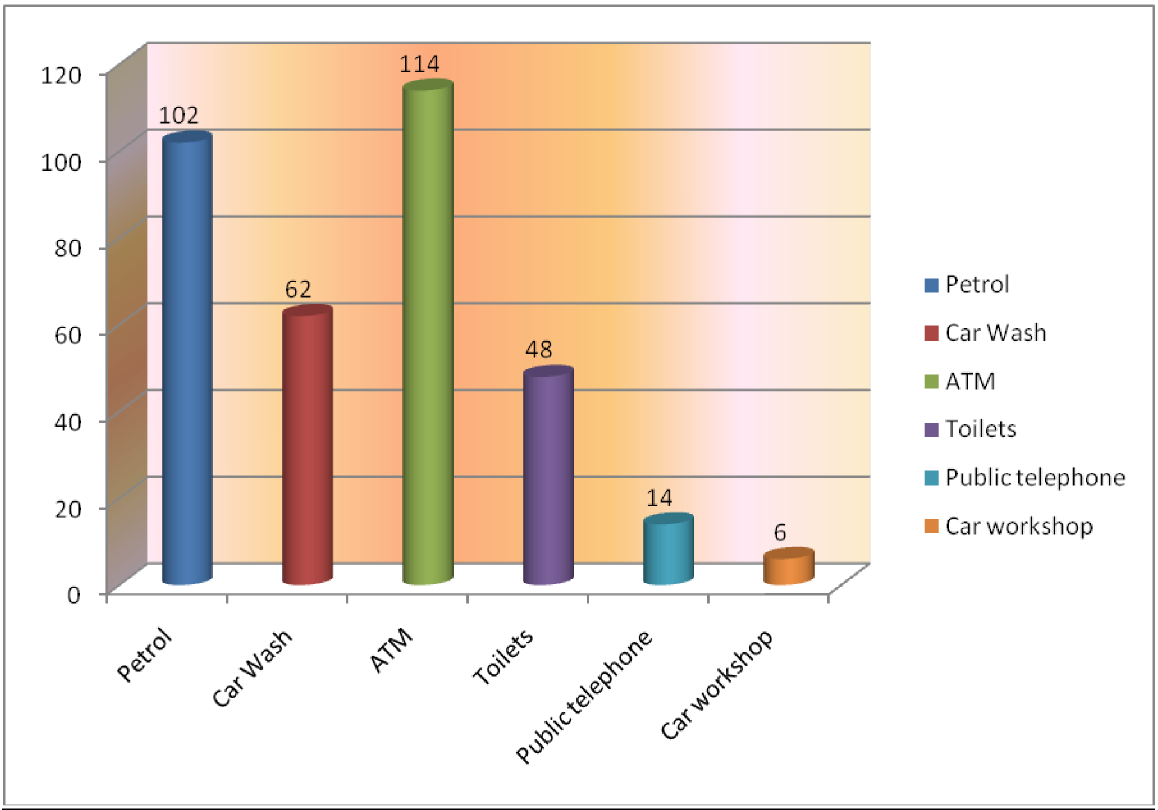
Patrons indicated that they were more likely to spend more than 15 minutes inside a convenience store (n=122), with those spending 10-15 minutes constituting the second largest proportion (n=61). Those that spend 5 minutes or less comprised the smallest group (n=18).

Figure 3.10: What do you usually buy at convenience shops?



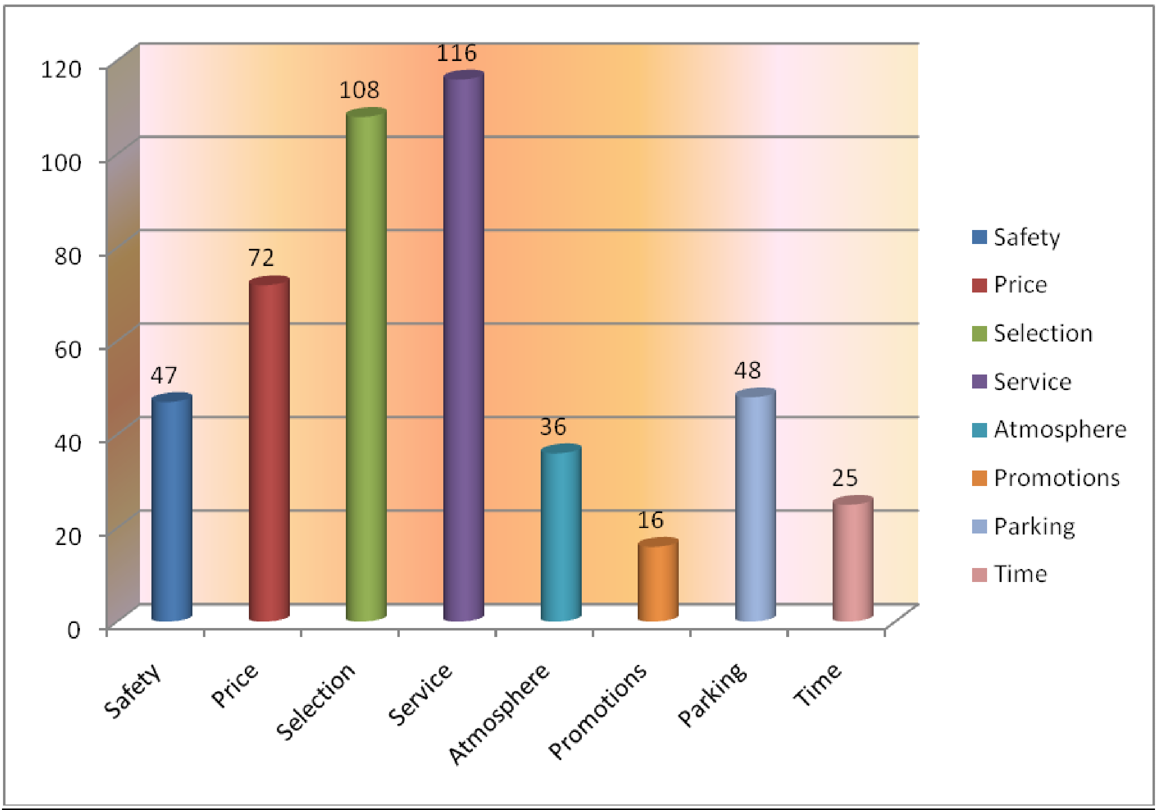
From figure 3.10, it can be seen that the commodities that were most likely to be purchased at Engen convenience stores comprised the following: (1) reading materials (n=115), (2) Air-time (n=103), (3) Cold drinks (n=76), (4) Chips (n=71) and (5) sweets (n=67). Of the items least purchased, chocolates were less likely to be purchased by 42 of the respondents, tobacco even less so by 28 of the respondents and commodities characterised as other (n=16) were items least purchased.

Figure 3.11: Which of these facilities do you normally use, when visiting a service station?



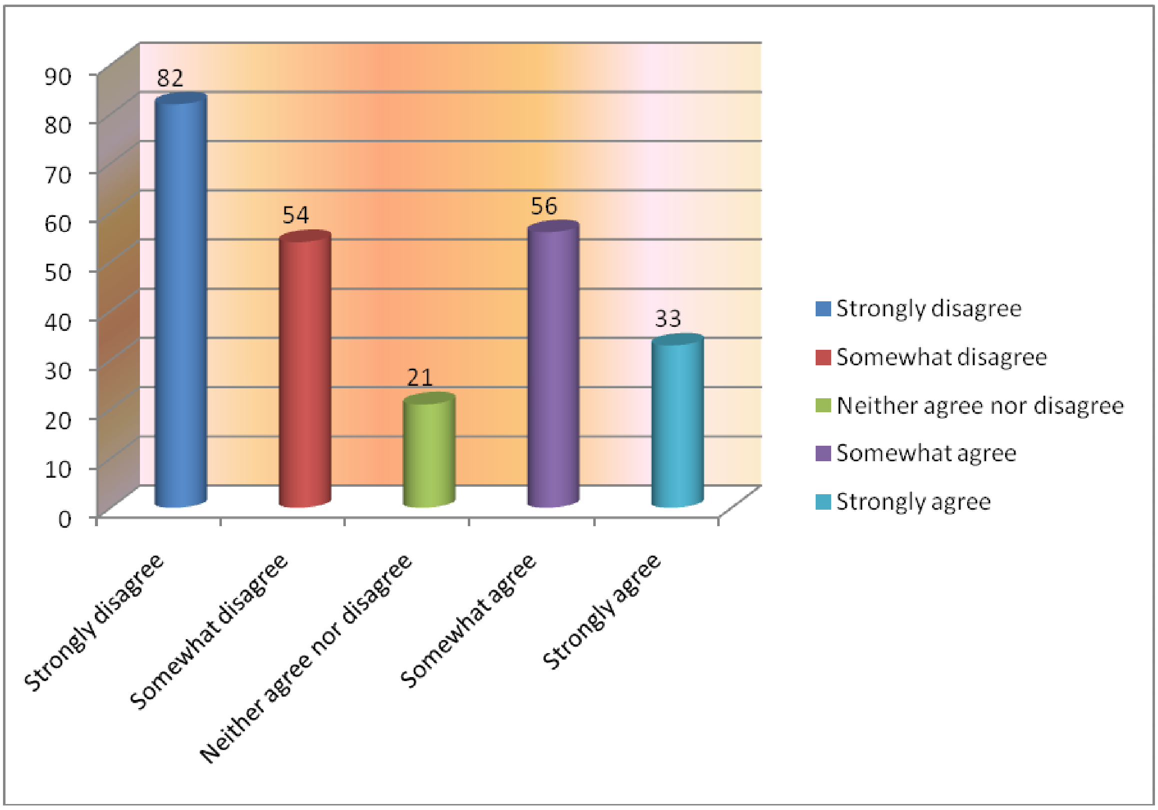
The facilities that were most likely utilised at Engen convenience stores were ATM's (n=114), petrol (n=102), car wash facilities and toilets (n=48). Public telephones were reported to be less utilised by patrons (n=14) and the least utilised facility reported by convenience store patrons was car workshops (n=6).

Figure 3.12: Which 3 of the following THREE are most important to you when visiting a QS store?



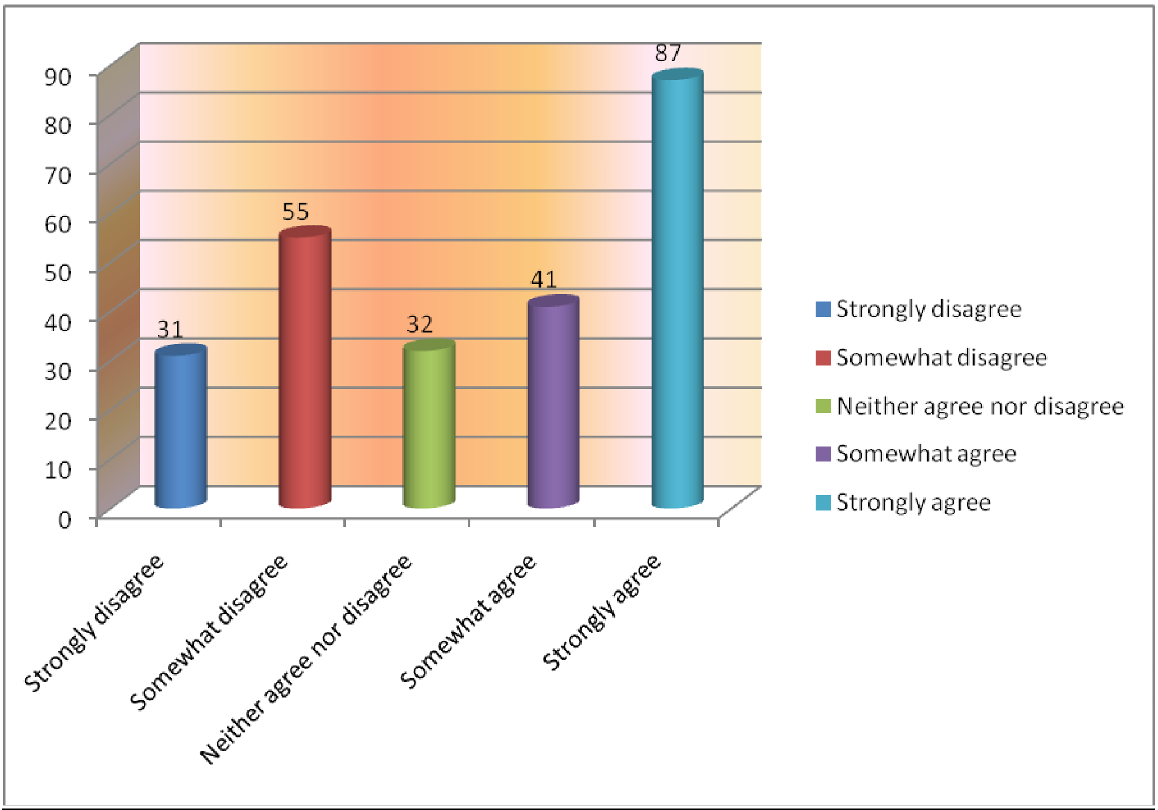
Most patrons rated service as an important aspect when visiting an Engen convenience store (n=116), followed by selection (n=108) and price(n=72). In addition, parking was rated relatively important by 48 respondents, followed by safety (n=47). Respondents rated atmosphere as relatively less important (n=36), followed by time (n=25), with promotions being reported as the least important aspect when visiting an Engen Quick Shop.

Figure 3.13: When thinking of prices at the convenience store:



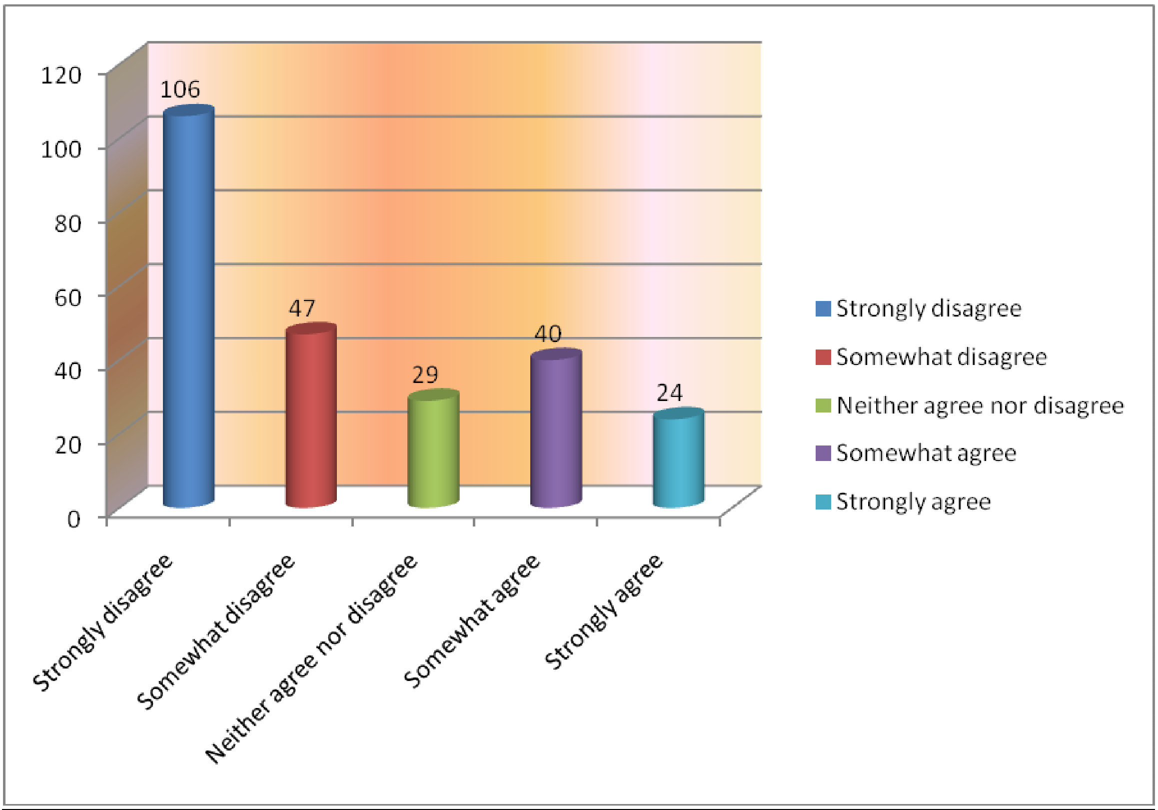
The largest proportion of respondents (n=82) strongly disagreed about the price playing a role in the use of convenience stores, with an additional 54 disagreeing that price influenced their utilisation of convenience stores. In addition, 54 respondents somewhat disagreed, while 56 somewhat agreed that pricing plays a role in the use of convenience stores. While 33 respondents strongly agreed, only 21 respondents neither agreed nor disagreed with respect to the role of pricing in the use of convenience stores.

Figure 3.14: Most prices are fair



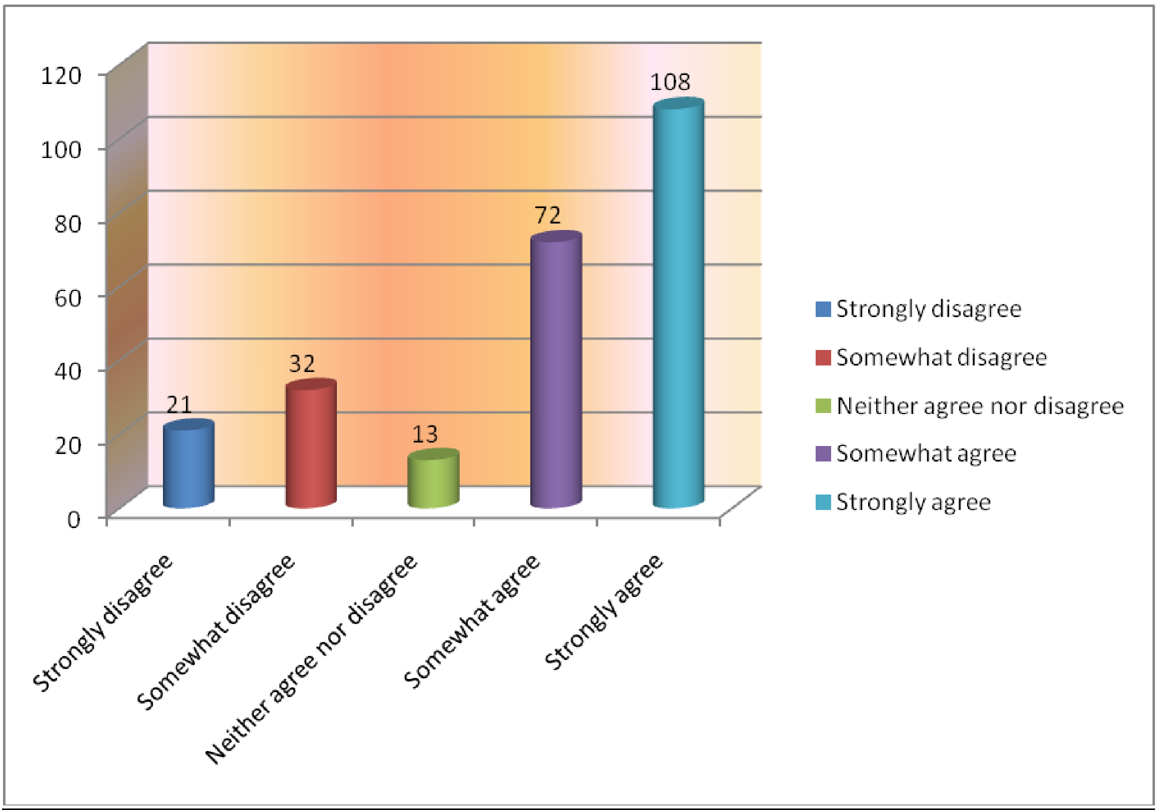
A large proportion of the respondents (n=87) strongly agreed that pricing was fair at convenience stores, with a further 41 respondents somewhat agreeing with the statement. Moreover, 55 participants somewhat disagreed and 31 strongly disagreed that pricing was fair at convenience stores. Of the respondents, 32 neither agreed nor disagreed that pricing at convenience stores was fair.

Figure 3.15: Business could charge lower prices and still be profitable



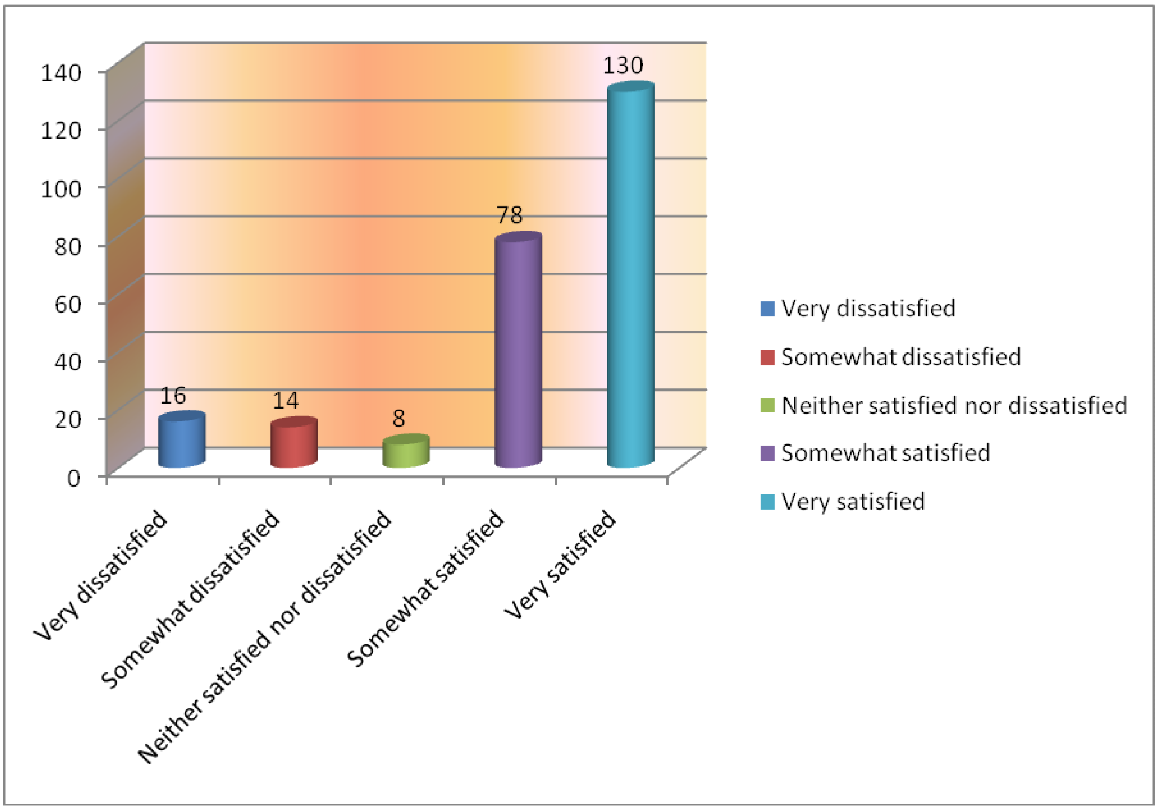
The majority of the respondents either strongly disagreed (n=106) or disagreed (n=47) that businesses could charge lower prices and still be profitable. Some repondents (n=29) neither agreed nor disagreed, 40 somewhat agreed and 24 strongly agreed with the statement that businesses could charge lower prices and still be profitable.

Figure 3.16: Most products are reasonable considering the high cost of business



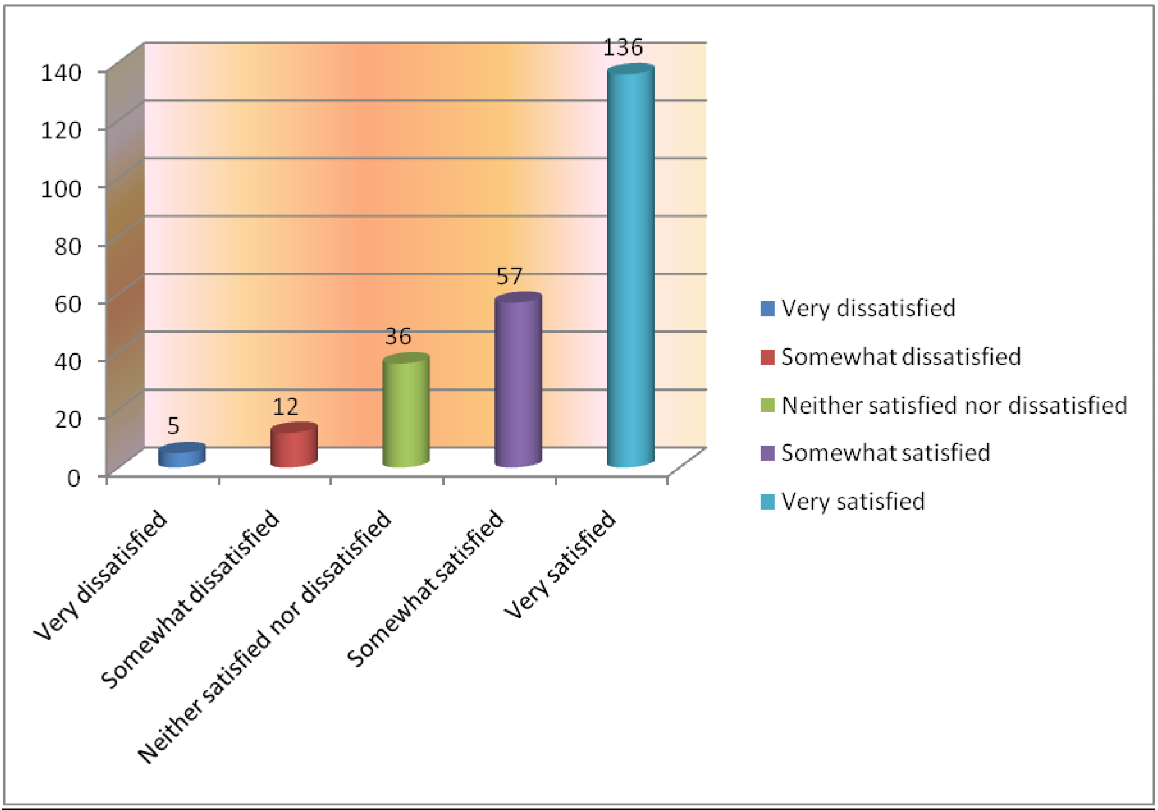
Patrons mostly strongly agreed (n=108) or somewhat agreed (n=72) that most products are reasonable considering the high costs of business. Only 13 respondents reported that they neither agreed nor disagreed with respect to whether prices were reasonable. Of the participants, 32 somewhat disagreed and 21 strongly disagreed that prices were reasonable considering the high costs of business.

Figure 3.17: Level of satisfaction with the quality of most products available to buy at convenience stores



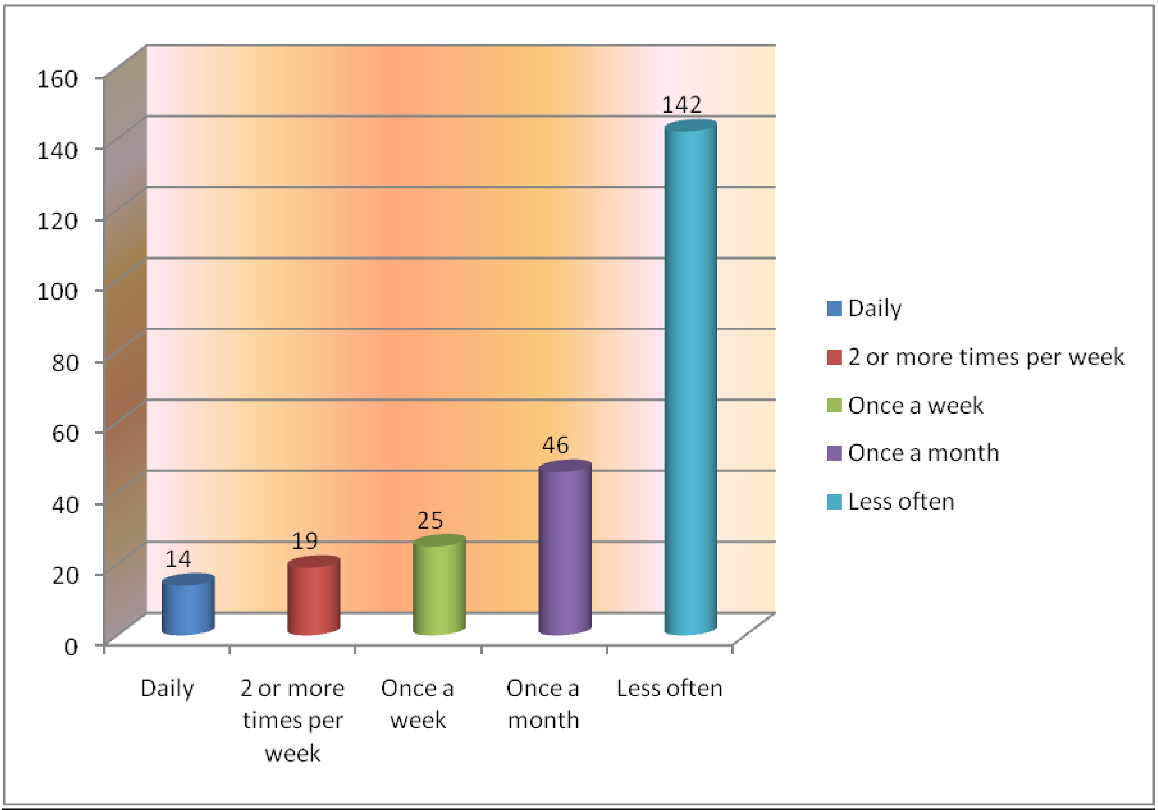
It appears that the largest proportion of respondents is very satisfied with the quality of most products to buy at convenience stores (n=130), with a further 78 respondents indicating they were somewhat satisfied. Very few respondents indicated they were very dissatisfied (n=16) or somewhat dissatisfied (n=14).

Figure 3.18: Level of satisfaction with the selling conditions at most of the stores where I buy



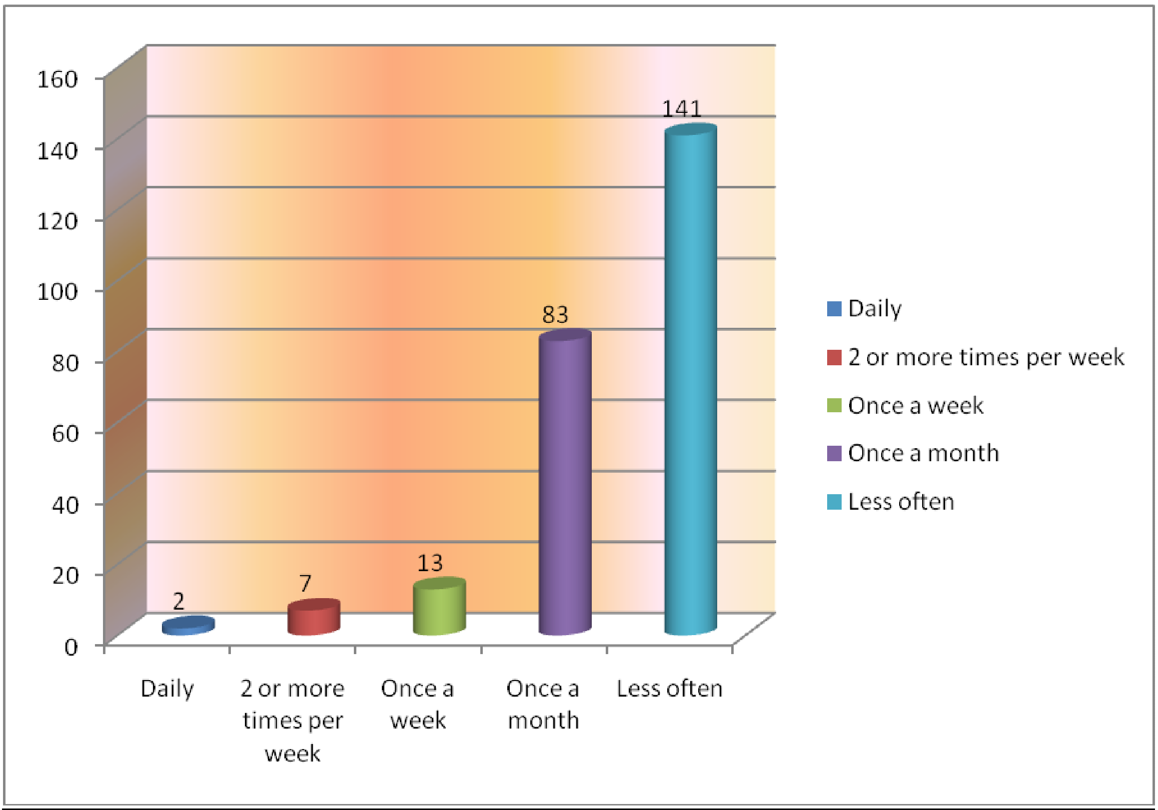
Respondents were for the most part very satified (n=136) or somewhat satisfied (n=57) with the selling conditions at most of the stores at which they buy, with a very small proportion of respondents indicating they were very dissatisfied at the selling conditions of the stores they frequented (n=5).

Figure 3.19: How often do you visit: Shell



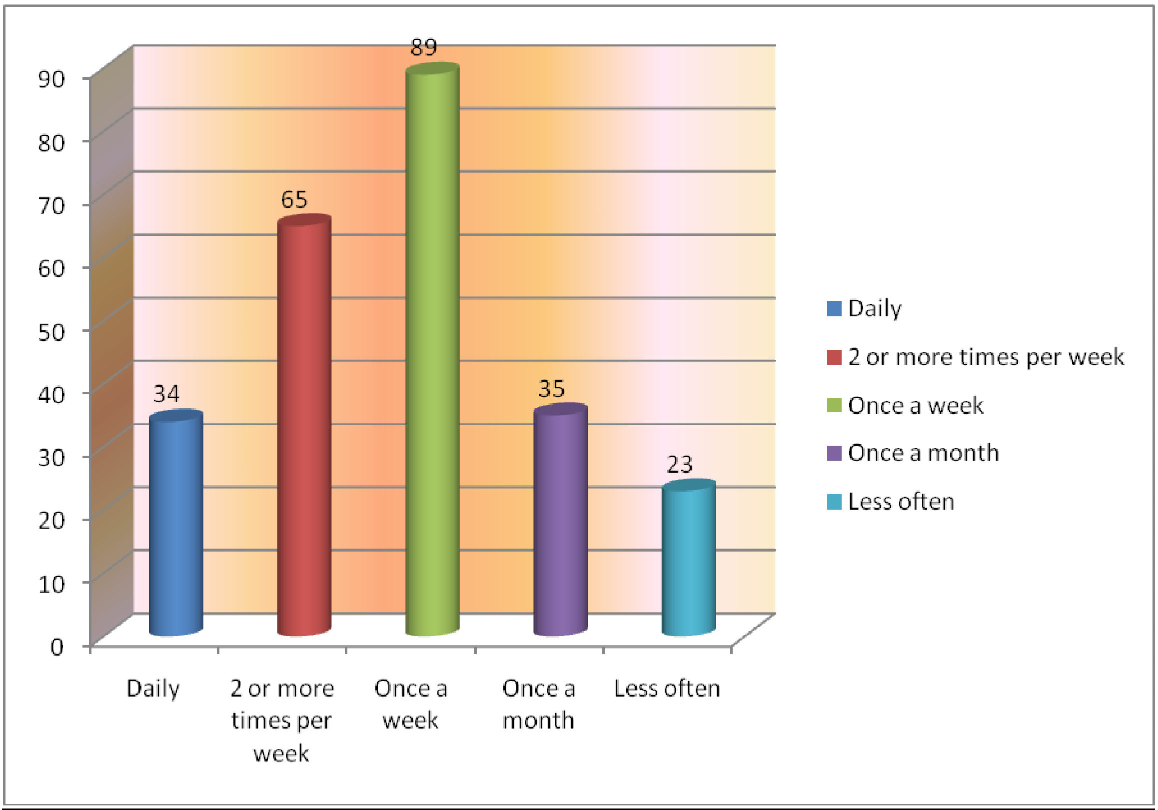
Of the respondents, only 14 visited Shell daily, and 19 visited the service station 2 or more times a week. Furthermore, 46 respondents patronised Shell convenience stores once a month, while 142 respondents indicated that they frequented the Shell convenience store less often.

Figure 3.20: How often do you visit: BP



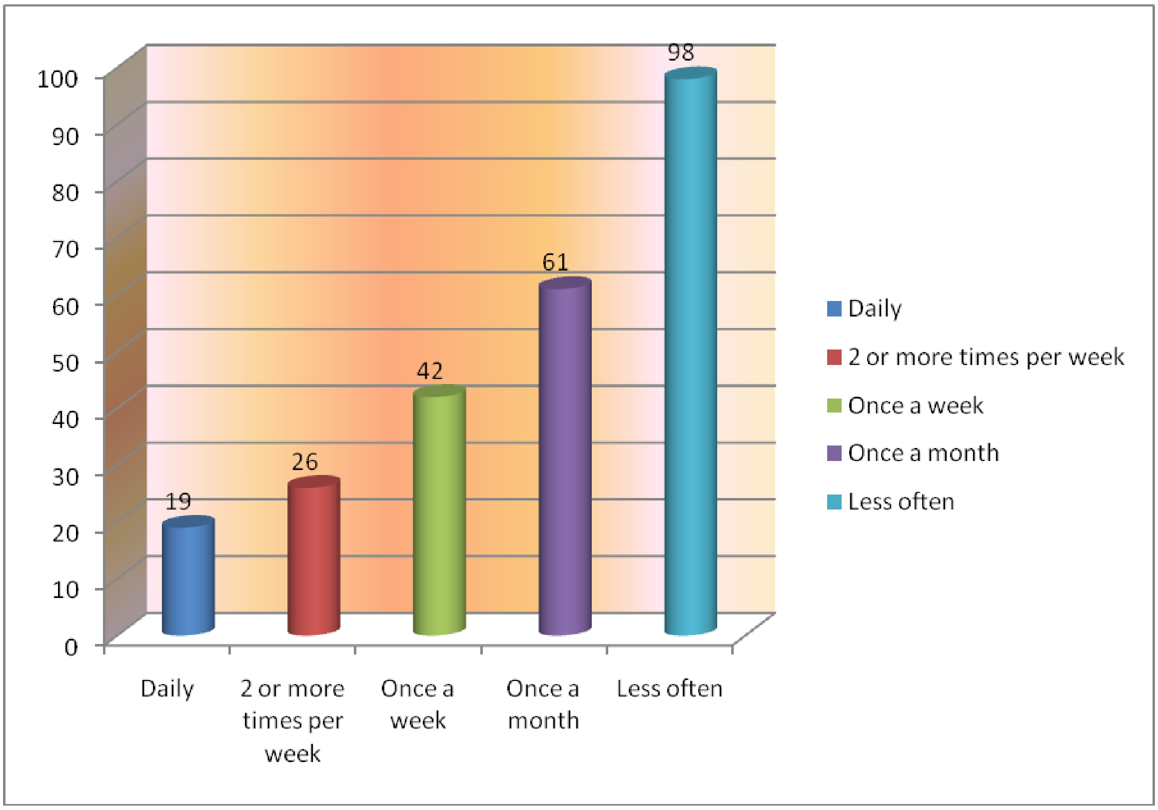
The number of respondents that visited BP convenience stores daily was marginal (n=2), with a futher 20 respondents visiting these stores between 2 or mor times a week to once a week. In addition, 83 respondents indicated that they patronised BP convenience stores once a month and 141 of the participants visited BP convenience stores less frequently.

Figure 3.21: How often do you visit: Total



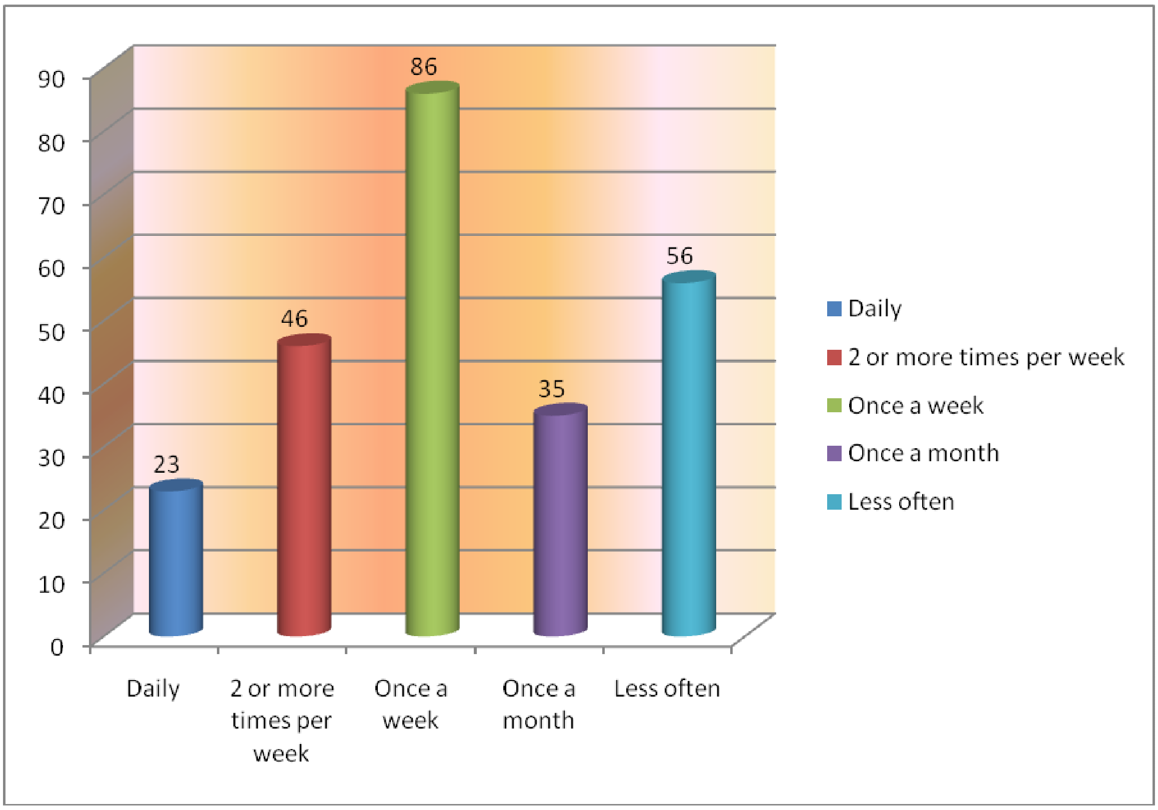
Patrons at Total garage convenience stores utilised this store on a daily basis (n=34), and 65 visited these service stores 2 or more times per week. Of the respondents, 89 frequented Total garage convenience stores once a week, with 35 visiting once a month. Only 23 respondents, indicated that they visited Total garage convenience stores less often.

Figure 3.22: How often do you visit: Excel



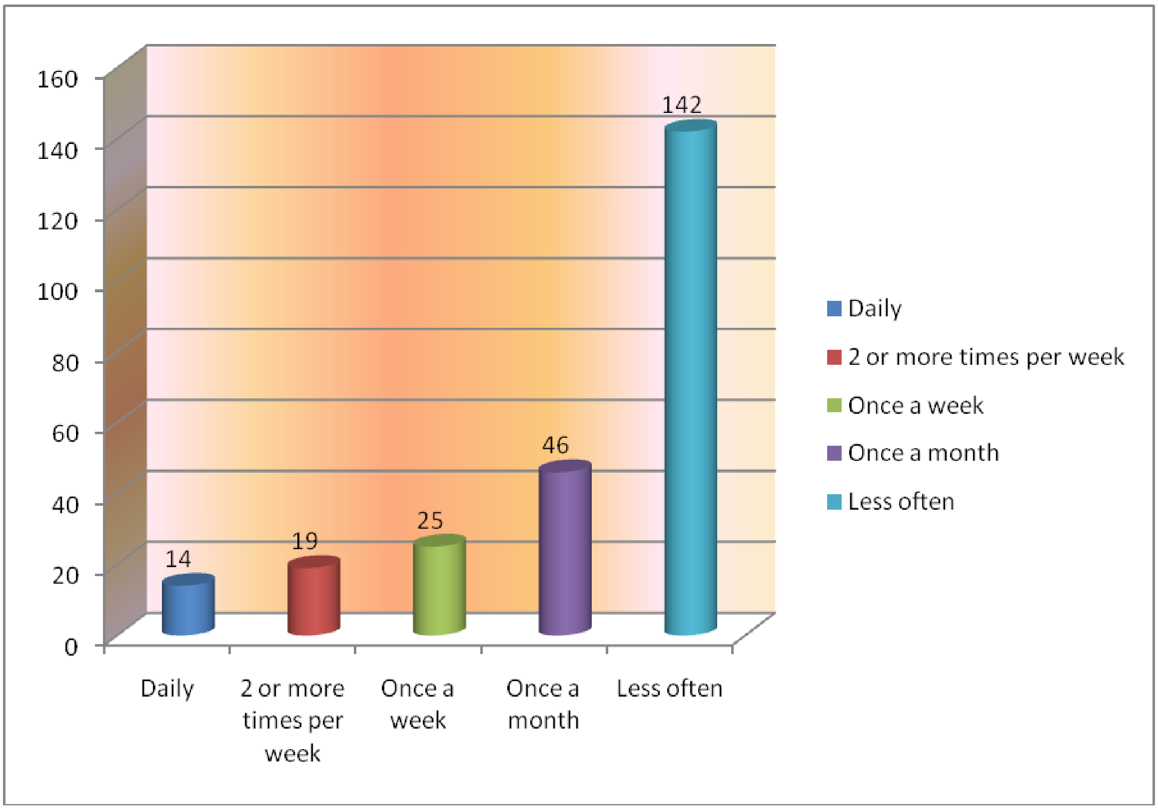
With respect to the patronage at Excel garage convenience stores, 19 respondents revealed that they visit such stores daily, 26 visted 2 or more times per week, and 42 indicated that they used these stores once a week. More, 61 respondents visited these stores once a month, and 98 reported to visit Excel garage convenience stores less often.

Figure 3.23: How often do you visit: Caltex



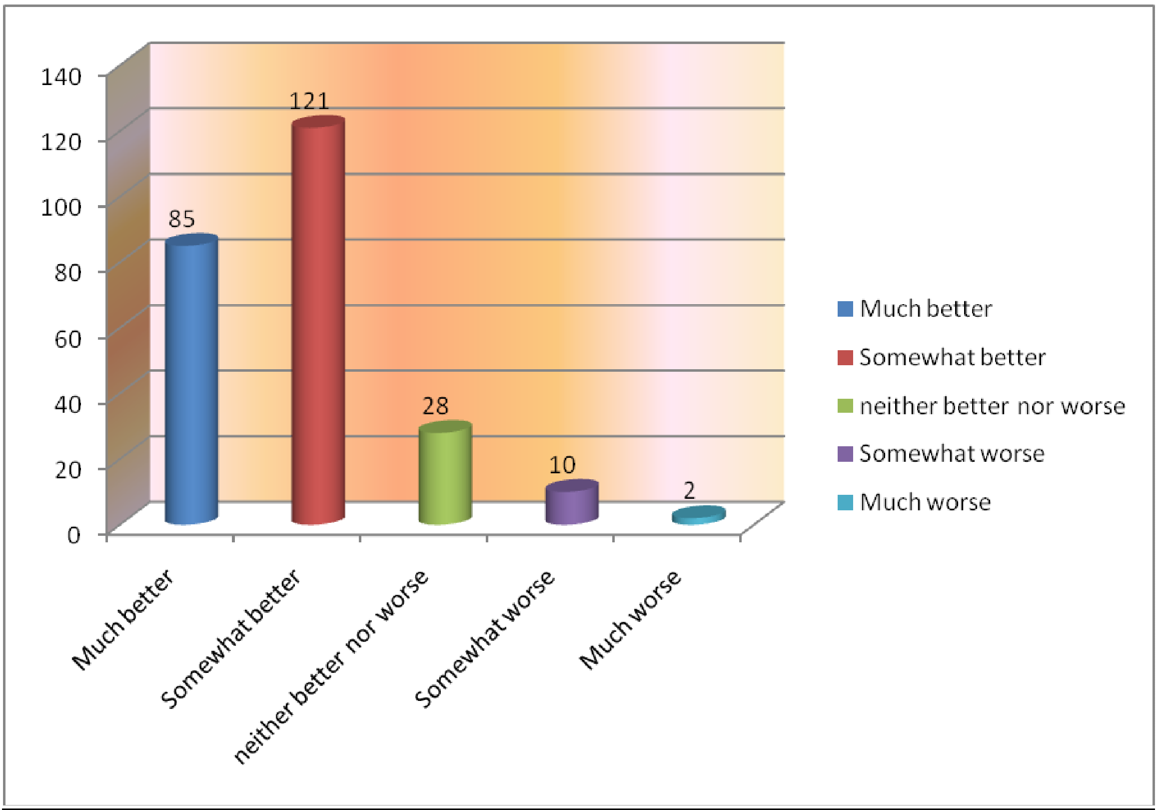
Caltex garage convenience stores were reported to be used by 23 respondents on a daily basis, with 46 respondents opting to patronise these stores 2 or more times per week. Those that used Caltex once a week comprise comprised the greatest proprtion (n=86), with a further 35 respondents reporting to visit Caltex garage convenience stores once a month and 56 participants, indicating that they frequented Caltex garage convenience stores less often.

Figure 3.24: How often do you visit: Sasol



Sasol was reported to be visited less often by 142 of the respondents, with a further 46 of the research participants reporting they visted Sasol garage convenience stores once a month. While 25 participants visited these stores once a week, only 19 respondents visited 2 or more times a month, and 14 reported frequenting Sasol garage convenience stores daily.

Figure 3.25: How does Engen compare with each of the other convenience store available?



The majority of respondents (n=121) indicated that they regarded Engen convience shops as somewhat better than their competitors, with a further 85 respondents reporting they perceived Engen Quick Shops to be much better than their competitors. Only 28 respondents indicated Engen convenience stores to be neither better nor worse, 10 reported these stores to be somewhat worse and a negligible proportion of repondents (n=2) reported Engen convenience stores to be much worse.

3.5 STATISTICAL ANALYSIS OF THE DATA

Both descriptive and inferential analysis techniques were utilised in this study. Descriptive statistics is concerned with "the description and/or summarization of the data obtained for a group of individuals" (Huysamen, 1990:3).

Descriptive statistics includes frequencies as well as measures of central tendency, namely, the mean, mode and median, and measures of dispersion - the range, variance and standard deviation.

Inferential statistics involves "making inferences regarding the properties (example, the mean) of populations on the basis of the results obtained for appropriately selected samples from these populations" (Huysamen, 1990:4). The inferential statistics for this research involved the use of t-tests, chi-square, correlations and analysis of variance (ANOVA).

3.5.1 DESCRIPTIVE STATISTICS

3.5.1.1 FREQUENCIES

Frequencies refer to the spread of data over the various categories of a certain phenomenon, from which the percentage and cumulative percentage of the occurrence of the categories can be calculated. Frequencies are used on nominally scaled variables, and are grouped into various non-overlapping categories (Sekaran: 1992).

3.5.1.2 MEASURES OF CENTRAL TENDENCY

3.5.1.2.1 MEAN

The mean is defined as "the sum of all the values of a series, divided by the number of values" (Martins et.al.:1996). The mean offers a general picture of the data, by providing an average or centre value for the data. It is also suitable for comparing different samples of the same population, as well as estimating a total for a population when the mean and the number of the population are known.

3.5.1.3 MEASURES OF DISPERSION

3.5.1.3.1 VARIANCE

The variance accounts for the problems encountered when using the range. It is the mean of the squared deviations of the values from the mean. The disadvantage however, is that it represents a squared value as opposed to the ordinary value of the mean with which it is compared. This is overcome by calculating the standard deviation (Churchill: 1992).

3.5.1.3.2 STANDARD DEVIATION

The standard deviation is a measure which is calculated as the square root of the variance. It is the standard measure of variability from the mean and the measure of dispersion (Sekaran: 1992).

The standard deviation is usually preferred to the variance, because it is expressed in the same units as those of the original measurements (Huysamen: 1990).

3.5.2 INFERENTIAL STATISTICS

3.5.2.1 CHI-SQUARE TEST

The chi-square test applies to nominal data and is concerned with whether the differences between an observed set of frequencies and a theoretically expected set of frequencies are significant (Martins et.al.:1996).

3.5.2.2 ANOVA

The analysis of variance is used to compare two or more sample means. Two criteria are taken into consideration: one measuring variations between columns and the other measuring variations within columns.

Once the between and within column variations have been established, the between column variations is divided by the column variations. The figure arrived at indicates the level of confidence at which we will be able to state that variations exist between the columns. The higher this figure, the greater our confidence will be (Martins et.al.:1996).

3.6 SUMMARY

The primary objectives of this research, the sampling technique used (convenience sampling) and a description of the research sample and the sample characteristics has been outlined.

It included a description of the research instruments used (questionnaire) as well as an overview of the statistical analysis methods, namely, descriptive and inferential statistics. The various parametric and non-parametric tests generate the results necessary for interpretation.

CHAPTER FOUR
STATISTICAL ANALYSIS OF DATA

4.1 INTRODUCTION

A review of the hypotheses generated is firstly given. Thereafter, a statistical analysis of the data is conducted to determine if there are any relationships between the elements of store image, store choice and the biographical variables.

4.2 HYPOTHESES

Sekaran (1992:79) defines an hypothesis as a "logically conjectured relationship between two or more variables expressed in the form of testable statements".

The following hypotheses were generated in investigating the effects of store image on consumer purchases in selected Engen convenience stores in the Western Cape:

1. "There is no significant difference in the choice of store with respect to age, gender, home language, population group and income levels respectively".

2. "There is no significant difference in the choice of store with respect to the general characteristics of the store, store location, product range, physical characteristics of the store, services offered, store personnel, prices charged and advertising respectively".

3. "There is no significant difference between the biographical details of the subjects (age, gender, home language, population group and income) and the functional elements of store image (general characteristics of the store, store location, product range, store physical characteristics, services offered, store personnel, prices charged and advertising respectively".

4.3 RESULTS AND DISCUSSION

The results of the statistical analysis are presented in the following order:

- An analysis of the means and standard deviations of the elements of store image.
- A correlation between the biographical details and the elements of store image.
- A chi-square analysis between the choice of store and the biographical details of the respondents.
- An analysis of variance conducted between the elements of store image and the choice of store.

Table 4.1

Means and Standard Deviations of the Elements of Store Image

VARIABLE	MEAN	SD
General characteristics	11.27	2.38
Location	14.52	2.21
Product Range	15.37	3.79
Physical characteristics	47.12	8.28
Services offered	21.58	5.40
Store personnel	30.20	5.49
Prices charged	10.93	2.22
Advertising	19.80	2.60

The elements of store image were ranked on a scale of 1 to 5, with 1 being an indication of the subjects' "strong disagreement" towards the element and 5 being an indication of a "strong agreement".

From Table 4.1 it can be concluded consumers rated the physical characteristics of a store as being the most important criterion (mean=47.12, SD=8.28). This was followed by the store personnel, with a mean of 30.20 and a standard deviation of 5.49. The dimension with the lowest mean was that of the price charged by the stores for the product (mean=10.93, SD=2.22).

Physical characteristics of the store included factors such as the neatness and cleanliness of the store, its decor, the wideness of the aisles, air-conditioning and lighting.

Table 4.2

Correlation coefficients between biographical data and the elements of store image.

	Age	Gender	Population Group	Home language	Income
General characteristics	0.1247 0.3430	-0.0375 0.7760	***0.2761*** ***0.0330***	0.0538 0.6830	0.0809 0.5390
Location	***0.2648*** ***0.0410***	***0.3018*** ***0.0190***	0.1989 0.1280	0.1521 0.2460	-0.1608 0.2200
Physical characteristics	-0.0229 0.8620	-0.2163 0.0970	0.1702 0.1940	-0.0682 0.6050	-0.0322 0.8070
Products	0.1040 0.4290	-0.2193 0.0920	0.1795 0.1700	-0.0940 0.4750	-0.0158 0.9040
Price	***0.2849*** ***0.0270***	***-0.3178*** ***0.0130***	0.0753 0.5670	-0.0050 0.9700	0.0028 0.9830
Personnel	0.0824 0.5310	0.0238 0.8570	0.2437 0.0610	0.1506 0.2510	-0.1429 0.2760
Advertising	0.0736 0.5760	-0.2220 0.0880	***0.3161*** ***0.0140***	-0.0450 0.7330	-0.0287 0.8280
Services	-0.0497 0.7060	-0.1971 0.1310	-0.0904 0.4920	-0.1443 0.2710	-0.0632 0.6310

- ***The italicised figures indicate a significant value***

From Table 4.2 the following relationships are significant at the 0.05 level:

1. There is a significant relationship between the age of the subjects and the location of the store (p=0.0410).

2. A significant relationship exists between the age of the subjects and the prices charged by the store (p=0.027).

3. There is a significant relationship between the gender of the subjects and the store location (p=0.019).

4. There is a significant inverse relationship between the subjects' gender and the prices charged by the store (p=0.013).

5. A significant relationship exists between the population group of respondents and their choice of store based on the general characteristics of the store (p=0.033).

6. There is significant relationship existing between the advertisements carried out by the store and the population group of the respondents (p=0.014).

7. There is a significant inverse relationship existing between the respondents' home language and the location of the store (p=0.038).

Table 4.3

Chi-squared Test: Distribution of Choice of Store by Age

AGE	STORE							
	Sasol	**Engen**	**Shell**	**BP**	**Total**	**Excel**	**Caltex**	
Under 20	1.9	2	0.7	0.2	0.6	0.9	0.7	
20 - 35	4.8	5.1	1.8	0.6	1.5	2.4	1.8	
36 - 50	7.5	7.9	2.8	0.9	2.3	3.7	2.8	
51 - 65	1.3	1.4	0.5	0.2	0.4	0.7	0.5	
Over 65	0.5	0.6	0.2	0.1	0.2	0.3	0.2	
Chi-square		**Value**	**DF**	**Sign**				
Pearson		33.09	24	.103				

On the basis of these findings, it can be inferred that there is no significant difference between the age and the choice of store. The null hypothesis is therefore substantiated.

Table 4.4

ANOVA: General Characteristics of the Store and Store Choice

Source	Sum of Squares	Mean Squares	F Ratio	F Prob
Between groups	89.96	14.99	3.26	0.01
Within groups	243.77	4.60		
Total	333.73			

From Table 4.4 it can be concluded there is a significant difference between stores chosen and to the perception of consumers regarding the general characteristics. We therefore reject the null hypothesis at the 0.05 level of significance.

Table 4.6

Mean Differences: Store Choice and General Characteristics

	STORE	S 6	S 2	S 1	S 7	S 5	S 3	S 4	
MEAN									**Key**
8.88	**S6**								**s1-store 1**
10.71	**S2**								**s2-store 2**
11.50	**S1**	*							**s3-store 3**
12.67	**S7**	*							**s4-store 4**
12.40	**S5**	*							**s5-store 5**
12.67	**S3**	*							**s6-store 6**
14.00	**S4**	*	*						**s7-store 7**

* Indicates significant mean differences

With respect to the mean differences between the stores and their general characteristics, the following are significant:

- Store 6 significantly differs from the rest of the stores, except Store 2.
- Store 2 significantly differs from Store 4.

This means more people choose stores 1 (mean=11.50), 3 (mean=12.67), 4 (mean=14), 5 (mean=12.40) and 7 (mean=12.17) than store 6 (mean=8.88) because of the former stores' general characteristics. There is no major difference between store 6 and store 2 as a choice of store when considering the general store characteristics.

Table 4.7

ANOVA: Store Location and Store Choice

Source	Sum of Squares	Mean Squares	F Ratio	F Prob
Between groups	79.08	13.18	3.33	0.01
Within groups	209.90	3.96		
Total	288.98			

Table 4.7 indicates there is a significant difference between the stores chosen and the perception of consumers regarding the convenience of reaching the store from their location. The null hypothesis is therefore rejected.

Table 4.8

Mean Differences: Store Choice and Location of Store

MEAN	STORE	S6	S7	S3	S5	S1	S4	S2	
12.38	**S6**								**Key**
13.17	**S7**								**s1-store 1**
14.00	**S3**								**s2-store 2**
14.40	**S5**								**s3-store 3**
14.94	**S1**	*							**s4-store 4**
15.00	**S4**								**s5-store 5**
15.76	**S2**	*	*						**s6-store 6**
									s7-store 7

* Indicates significant differences

From the analysis on mean differences, the following are significantly different with respect to store location:

- Store 6 significantly differs from Stores 1 and 2.
- Store 7 significantly differs from Store 2.

This implies more respondents are likely to patronize store 1 (mean=14.94) and store 2 (mean =15.76) than store 6 (mean=12.38) because of the convenient location of the first two stores.

Table 4.9

ANOVA: Physical Characteristics of Store and Store Choice

Source	Sum of Squares	Mean Squares	F Ratio	F Prob
Between groups	674.11	112.35	1.77	0.12
Within groups	3372.07	63.62		
Total	4046.18			

The results in Table 4.13 indicate there is no significant difference between perception of consumers regarding the physical characteristics of the store and the store chosen. This implies the null hypothesis is substantiated.

<u>Table 4.10</u>

<u>Mean Differences: Store Choice and Physical Characteristics</u>

	STORE	**S 4**	**S 1**	**S 5**	**S 3**	**S 2**	**S 7**	**S 6**	
MEAN									**Key**
39.00	**S4**								**s1-store 1**
44.81	**S1**								**s2-store 2**
45.20	**S5**								**s3-store 3**
45.83	**S3**								**s4-store 4**
47.00	**S2**								**s5-store 5**
50.00	**S7**								**s6-store 6**
54.00	**S6**	*	*						**s7-store 7**

* Indicates significant differences

The analysis on mean differences indicates there is a significant difference between store 6 (mean=54) and stores 4 and 1 (mean=39 and mean=44.81 respectively) in terms of the physical characteristics of the stores.

Table 4.11

ANOVA: Product Range and Store Choice

Source	Sum of Squares	Mean Squares	F Ratio	F Prob
Between groups	255.59	42.60	3.82	0.00
Within groups	590.34	11.14		
Total	845.93			

Table 4.15 indicates there is a significant difference between the stores in terms of their product range. The null hypothesis is therefore rejected at the 0.05 level of significance.

Table 4.12

Mean Differences: Store Choice and Product Range

	STORE	S 2	S 1	S 5	S 4	S 3	S 6	S 7	
MEAN									**Key**
39.00	**S2**								**s1-store 1**
44.81	**S1**								**s2-store 2**
45.20	**S5**								**s3-store 3**
45.83	**S4**								**s4-store 4**
47.00	**S3**								**s5-store 5**
50.00	**S6**	*	*						**s6-store 6**
54.00	**S7**	*	*	*					**s7-store 7**

* Indicates significant differences

From the above table on mean differences, the following are significantly different with respect to the product range and store choice:

- Store 2 (mean=39) significantly differs from Stores 6 (mean=50) and 7 (mean=54).
- Store 1 (mean=44.81) significantly differs from Store 6 and 7.
- Store 5 (mean=45.20) significantly differs from Store 7.

This implies in choosing a store in terms of the products it offers, the respondents preferred stores 6 and 7 (mean=18, and store 7, mean=19.50) rather than store 2 (mean=13.24). The two former stores were also preferred than Store 1 (mean=14.38).

Table 4.13

ANOVA: Prices Charged by the Store and Store Choice

Source	Sum of Squares	Mean Squares	F Ratio	F Prob
Between groups	115.96	19.33	5.83	0.00
Within groups	175.77	3.32		
Total	291.73			

Table 4.17indicates there is a significant difference between the prices charged by the stores and the store chosen by the subjects. Hence, the null hypothesis is rejected at the 0.05 significance level.

Table 4.14

Mean Differences: Store Choice and Prices Charged by Store

	STORE	S 5	S 1	S 4	S 2	S 3	S 6	S 7	
MEAN									**Key**
8.60	**S5**								**s1-store 1**
9.50	**S1**								**s2-store 2**
10.00	**S4**								**s3-store 3**
11.53	**S2**	*	*						**s4-store 4**
11.67	**S3**	*	*						**s5-store 5**
11.75	**S6**	*	*						**s6-store 6**
13.50	**S7**	*	*	*	*				**s7-store 7**

* Indicates significant differences

From Table 4.18 the following are significantly different with respect to the prices charged by the stores and the store choice:

- Store 5 significantly differs from stores 2, 3, 6 and 7. This implies more people choose store 1 (mean=8.6) on the basis of its prices charged than the other stores.
- Store 1 significantly differs from Stores 2, 3, 6, and 7.
- Compared to Other stores (7), stores 2 and 4 have lower prices.

Table 4.15

ANOVA: Store Personnel and Store Choice

Source	Sum of Squares	Mean Squares	F Ratio	F Prob
Between groups	277.70	46.28	1.64	0.16
Within groups	1497.90	28.26		
Total	1775.60			

The results in Table 4.19 indicate there is no significant difference between the perception of consumers regarding the store personnel and the store chosen. This implies the null hypothesis can be substantiated.

Table 4.16

Mean differences: Store Choice and Store Personnel

	STORE	S 5	S 1	S 4	S 7	S 2	S 6	S 3	
MEAN									**Key**
25.40	**S5**								**s1-store 1**
28.69	**S1**								**s2-store 2**
29.00	**S4**								**s3-store 3**
30.67	**S7**								**s4-store 4**
30.76	**S2**								**s5-store 5**
32.13	**S6**								**s6-store 6**
34.00	**S3**	*							**s7-store 7**

* Indicates significant differences

From the analysis on the mean differences, we conclude there is a significant difference between store 3 (mean = 34) and store 5(mean = 25.40) in terms of their personnel. This implies when consumers had to make a choice in terms of their personnel, fewer chose the latter as compared to the former.

Table 4.17

ANOVA: Advertising and Store Choice

Source	Sum of Squares	Mean Squares	F Ratio	F Prob
Between groups	38.39	6.40	0.94	0.47
Within groups	359.21	6.78		
Total	397.60			

Table 4.21 indicates there is no significant difference between advertising of the store and store choice. We therefore accept the null hypothesis in this case.

Table 4.18

ANOVA: Customer Services and Store Choice

Source	Sum of Squares	Mean Squares	F Ratio	F Prob
Between groups	402.23	67.04	2.70	0.02
Within groups	1316.35	24.84		
Total	1718.58			

From Table 4.22 it is evident there is a significant difference between the perceptions of the consumers regarding customer services and the store chosen. We can therefore reject the null hypotheses.

Table 4.19

Mean Differences: Store Choice and Customer Services

	STORE	S 2	S 1	S 4	S 3	S 5	S 6	S 7	
MEAN									**Key**
19.65	**S2**								**s1-store 1**
19.81	**S1**								**s2-store 2**
20.00	**S4**								**s3-store 3**
22.00	**S3**								**s4-store 4**
22.40	**S5**								**s5-store 5**
24.25	**S6**	*	*						**s6-store 6**
27.67	**S7**	*	*						**s7-store 7**

* Indicates significant differences

From the analysis on the mean differences, the null hypothesis can be rejected in the following cases:

- Store 2 (mean=19.65) significantly differs from Stores 6 and 7 (mean=24.25, and store 7, mean=27.67). That implies the latter two stores were chosen more often than the first one on the basis of its services offered.

- Store 1 (mean=19.81) also differs significantly from Stores 6 and 7, when chosen on the basis of its services offered to the customers.

4.4 SUMMARY

The relationships between the various elements of store image and the choice of store were determined. The results of the statistical analyses were presented in tabular form followed by a presentation of the relevant findings that enable comparision of results with related studies.

CHAPTER FIVE
COMPARISON OF RESULTS

5.1 INTRODUCTION

Previous research findings on store image will be presented. The results of the present study will be then be compared and contrasted to these findings.

5.2 COMPARISON OF RESULTS WITH RESPECT TO THE ELEMENTS OF STORE IMAGE

5.2.1 GENERAL CHARACTERISTICS

From the present study conducted it was concluded there is a significant difference between the choice of store and its' general characteristics.

A survey conducted by the South African research group Markinor (Graham:1995) on the importance of product, company and service brands in South Africa, found that the company or business that is shopped at most frequently is Pick 'n Pay (11%). The survey was conducted amongst the four race groups in South Africa (that is Blacks, Coloureds, Indians and Whites). It also indicated consumers have a 61% level of trust and confidence in this store. One of the conclusions of the study was that those stores/brand that enjoy a high level of awareness, are also trusted and respected.

Regarding the commonly chosen retailers in the country, OK Bazaars is the best known retail store (20%). Pick 'n Pay follows in second place (17%), with Shoprite/Checkers close on its heels (12%). Once again, Pick 'n Pay achieved a high trust and confidence level of 63% by its shoppers.

Earnshaw (1979), in a study on the Pick 'n Pay store chain found this store focuses on the following factors which they consider important when starting a new store: location, accessibility, design and planning, parking, customer services and feasibility.

The management of Pick 'n Pay also believes in creating a very pleasant shopping atmosphere in the following ways:

- Easy access to and from the parking lot

- A large foyer to give an airy atmosphere
- Merchandise boldly and attractively laid out
- Floor colouring which reflects light and gives atmosphere
- The subtle use of artificial and natural light
- Friendly and courteous management and staff.

Several researchers have utilized the proliferation in convenience stores to understand the factors that contribute to their success. Sartorius (2007) found several factors were significant in influencing the performance of convenience stores. These factors included loyalty, service, rental and appearance. Other factors included good management, competition, staff, security, efficient marketing and additional services. In this regard, these additional factors are supported by other international studies (Nault & Dexter, 2003).

Molefi (2007) investigated what motivates consumers to visit forecourt convenience shops, what makes them spend more, and ultimately what will lead them back. He examined factors such as the role of brands, hygiene factors, total customer experience, demographics and price, which are then assessed against variables such as spend per trip, repatronage intentions, and frequency of shopping.

Results from the survey conducted by Molefi (2007) suggest that petrol brands play no role in the decision of customers to go to forecourt convenience shops, with forecourt shops now beginning to create their own profiles based on customers' perceptions of service and experience. He also found that age plays no role in spending. However, gender was found to play a significant role in terms of what is bought, providing an opportunity for retailers to position their promotions towards males or females. Moreover, the research also found that race plays a role, with whites buying more than non-whites, which is not surprising given South Africa's legacy.

The most popular additional source of income for filling stations is the convenience store. In many situations, convenience stores appeared to fully supplement losses made by forecourt activities resulting in an overall net profit for the fuel station. In a survey conducted by Peacock Consulting on 74 BP sites around South Africa, 66% of people visiting the fuel station did so with the main purpose of buying from the convenience store. In comparison, only 34% visited the service station to purchase fuel (Peacock Consulting, 2004) with the average spent at the convenience store being R 20.50, and 15.3% of convenience store customers spending over R30.00. Other additional services include banking and ATM's, car-wash, fast food outlets, motor car sales, lotto outlets, public telephones and cellular telephone supplies (Human Sciences Research Council, 1992).

The following additional data is relevant (Sartorius, 2007):

- Of the 15 fuel stations included in the case study, all 15 of the fuel stations produced a net profit when considering all activities;
- 6 of the fuel stations were not profitable when considering only forecourt activities;
- All of the fuel stations that sold more than 370 000 liters of fuel per month were profitable when considering only forecourt activities;
- 2 out of the 15 fuel stations included in the case study were owned by supplier-oil companies and franchised to dealers. Both of these fuel stations were not profitable when considering only forecourt activities, sighting excessively high rentals and franchise fees as the cause.
- Other ways to increase returns to fuel station owners should also be considered. If supplier-oil companies supplied fuel stations on a consignment basis for stock, as opposed to demanding upfront payment, this would relieve interest charges on financing stock. Fuel station owners would also not be subject to the risk due to price fluctuations. Another aspect where supplier-oil companies could relieve the financial burden of fuel station owners would be to reduce the excessively high rentals they demand for their sites (FleetCube, 2005).

5.2.2 STORE LOCATION

The results in this study indicate there is a significant difference between the choice of store and its' location. In a study conducted by Myers(1960), it was found distance and parking convenience are the main reasons why many consumers choose local shops.

Pessemier (1980) conducted research on store image and positioning and found the subjects viewed store location as the third most important factor when choosing an outlet to patronize.

Otto (1990) conducted a study on the geo-demographic typication of lifetsyle, linked to the choice of shops. It was based on the lifestyles and the choice of convenience store of two neighbourhoods of Stellenbosch (South Africa). One of the results indicated the inhabitants of Idasvalley viewed store location as important in deciding which store to patronize.

However, the residents of Cloetesville, whose income was less than that of the Idasvalley residents, indicated the location of a store was not an important factor in deciding where to shop.

In another study conducted by Zimmer & Golden (1988) on consumers' impressions of retail stores, the authors concluded the location of a store was the third most important factor consumers used when choosing a store to patronize.

Engel et.al. (1993) also emphasize consumers will travel longer distances for clothing than for household goods or products they can purchase locally.

5.2.3 PHYSICAL CHARACTERISTICS

The results from this study indicate there is no significant difference between the physical characteristics of the store and the store chosen.

However, research on improving the store environment, conducted by Spangenberg, Crowley & Henderson (1996), indicate there is a significant difference certain physical characteristics of the store which was chosen for patronage.

They were concerned managers of retail stores and service outlets were diffusing scents into their stores to create more positive environments, to develop a competitive advantage and to attract more consumers to their stores. They did this despite no scholarly research to support the use of scents in the store environment.

The authors studied the effects of ambient scent in a simulated retail environment. They reported there was a difference between evaluations of and behaviours in a scented store environment and those in an unscented store environment. Their findings provided guidelines for managers of retail and service outlets concerning the benefits of scenting store environments.

Further studies conducted on the benefits of in-store music shows it can have a positive impact on a customer's predisposition to buy, the amount of time a shopper spends in a retail environment, the amount spent by the customer when purchasing and the consumer's perception of the quality of the shopping experience (Engel et.al.:1993).

In a study conducted by Bellizzi et.al. (1983), it was found colour has a variety of physical and psychological effects on both humans and animals. The authors examined the effects of colour on consumer perceptions of retail store environments in a laboratory experiment. They concluded colour can have customer drawing power as well as image-creating potential.

5.2.4 PRODUCT RANGE

From the present study conducted, it was concluded there is a significant difference between the choice of a store and its' product range.

In a study conducted on store image, Nevin & Houston (1980) concluded a store's product range was one of the top five most important elements consumers considered when choosing to shop at that particular store.

An article entitled "How Do They Shop Today", drawn up as a supplementary in the Chain Store Age series (1996) researched the subject's current shopping trends. One of the findings was that a lack of inventory was one reason for customers would not patronize a store.

5.2.5 PRICES CHARGED

The results in this study indicate there is a significant difference between the prices charged by the store and the store chosen.

Zimmer & Golden (1988) conducted a study on consumers' impressions of retail stores and found the price of the store's products was the most important factor in deciding which store to patronize.

In another study on store image, Nevin & Houston (1980) concluded that good prices were one of the most important elements consumers considered when choosing to shop at a particular store.

An article entitled "How Do They Shop Today", drawn up as a supplementary in the Chain Store Age series (1996) researched the subject's current shopping trends, as well as the importance of price and quality in consumer decisions. They concluded high prices were one reason customers would not patronize a particular store.

5.2.6 STORE PERSONNEL

The present study indicates there is no significant difference between the behaviour and attitiude of the store personnel and the choice of store.

This study is supported by research conducted by Zimmer & Golden (1988) on consumers' impressions of retail stores. One of the major findings was the majority of the 1600 consumers surveyed paid little attention to the store personnel when deciding which store to patronize.

However, in a study conducted by Ford (1995) on the influence of courteous service on customer behaviour, it was found as the cashiers exhibited more courtesy, customers gave more positive evaluations of customer service and were more likely to recommend the store to friends and to shop at the store, even if other stores were nearer. But even if customers who were in a positive mood were more likely to help other customers, their mood was not clearly influenced by the courtesy of the cashiers.

5.2.7 ADVERTISING

The results from the present study indicate there is no significant difference between the store chosen and its' advertising.

Otto (1990) conducted a study on the geo-demographic typication of lifetsyle, linked to the choice of shops. It was based on the lifestyles and the choice of grocery store of two neighbourhoods of Stellenbosch (South Africa). One of the results indicated that both the inhabitants of Idasvalley and Cloetesville used advertisements in choosing which store to patronize.

5.2.8 CUSTOMER SERVICES

From the present study, it was concluded there is a significant difference between the customer services offered by the store and the choice of store.

In an article based on the Pick 'n Pay store chain by Earnshaw (1979), the managers feel it is important in providing for the needs of the consumer. Seating in the malls, toilet facilities, post office and banking and garage facilities all play an important role. They have even given considerable thought to the less fortunate and physically handicapped. Wherever possible, thought has been given to making shopping even a bit more pleasant for them too.

In their study on consumer's impressions of retail stores, Zimmer & Golden (1988) found that the subjects rated the ease of getting credit at a store one of the most important factors when deciding which store to patronize.

5.3 CONCLUSION

The findings of the present study has been compared and contrasted to previous research conducted on store image.

With respect to store location, product range, price, customer services and advertising, previous research supports the conclusions drawn in this study. This implies these variables play an important role in store choice. Past research conducted on the physical characteristics of a store contrasted the results obtained in this study, where it was found this element has no impact on store choice.

CHAPTER SIX
CONCLUSIONS AND RECOMMENDATIONS

6.1 INTRODUCTION

This chapter presents a summary of the most important findings of the research conducted. It incorporates the conclusions that can be drawn from the research as well as recommendations for future research.

6.2 CONCLUSIONS AND RECOMMENDATIONS

According to Lowman (2011:1), "Forecourt sites have developed into essential commodities for their communities and are continuing to adapt to suit shopper needs. The practical advice and research available to retailers today will be incredibly useful for them as they look to continue transforming their business to remain competitive in the current climate."

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Consumer shopping behaviour has changed dramatically since the days before the automobile and the interstate roadway system. In the early twentieth century, consumers patronized the nearest shopping center because of high transportation costs both in terms of time and money. Thus, the proximity of a retail location to a customer explained most, if not all, retail sales. Consumer shopping behaviour determines retail patronage patterns. A large body of research suggests that the combined effects of location, comparison shopping, and department store image captures a majority of consumer shopping behaviour.

The following conclusions can be drawn from an analysis of the data:

1. There are significant relationships between the gender and population group of the subjects and their store choices respectively.

2. There are significant differences between the perception of the consumers regarding the general characteristics of the store, location, product range, prices charged and customer services and the store chosen respectively.

3. The following relationships were significant when a correlation analysis was conducted between the respondents' biographical data and the functional elements of store image:

a) There is a significant relationship between the population group of the subjects and the general characteristics of the store.

b) There are significant relationships between the age, gender and home language of the subjects and the location of the store respectively.

c) There are significant relationships between the age and gender of the subjects and the prices charged by the store respectively.

d) There is a significant relationship between the population group of the subjects and the stores' advertising.

Regarding the rest of the correlations, there were no significant relationships.

With respect to the functional elements of store image, the subjects chose the physical characteristics of a store as the most important element. This included aspects such as neatness and cleanliness of a store. The attitudes, behaviour, helpfulness and courteousness of store personnel followed as the next important element.

The following recommendations for future research are based on the observations from conducting the present study. It is recommended:

An exploratory study is needed to gain preliminary knowledge on the perceptions consumers have concerning convenience. This exploratory effort would yield information concerning the variables influencing perceived need for convenience and information about product attributes perceived as making one product more convenient than another. Ethnographic research can provide qualitative knowledge upon which to build the construct and lead to more valid and reliable operationalization of the construct in empirical testing.

Theories and models must be generated in order to develop hypothetical links between convenience and other marketing and social science concepts and constructs. Once preliminary theories have been articulated, empirical studies need to be conducted, testing specific hypotheses. Samples representative of consumers at large need to be utilized in order to develop complete conceptualizations. Researchers need to begin to study the construct from the point of view of all household types. One can easily argue, for example, that single person households are under the severest time constraints in that there is no other household member to share in the consumption/ production process.

It will be necessary to integrate the construct of convenience into the consumer behaviour model and the broad area of marketing. The construct, once satisfactorily defined, operationalized, and understood, should then be applied by marketing practitioners to more effectively and efficiently deliver the products and services needed by the modern consumer. If the aforementioned trends do indeed give rise to greater consumer need for "convenience" as a product attribute and benefit, marketers must be aware of the complexity of the construct.

A similar study conducted on larger samples comparing various areas or regions, either locally or nationally and amongst regions to make more conclusive statements and to facilitate cross-cultural comparisons.

If a similar study is conducted, a proportionate stratified random sample should ideally be utilised to facilitate generalisation to the entire population. This would enhance the scientific quality of the research.

6.3 CONCLUSION

The findings of this study were highlighted, as well as what steps should be undertaken to improve such research in the future. Such steps include conducting the research on a larger sample and the use of a probability sampling technique, such as random sampling.

- Managers of filling stations with forecourt convenience stores should separate the administrative functions of these two entities. 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 customize their product offering.

- Other organized traders would also be advised to study the forecourt convenience market to understand the impact of this market on their own businesses.

Dhurup (2008: 64) maintains that "as new retail formats continue to develop and secure their positions in the market, knowledge of what attributes attract customers to stores has become important". Specialist convenience skills are required to manage these stores, since a clearer and focused understanding of consumer motivation is required. Hence it is incumbent on managers to understand their specific target markets and spending profiles to facilitate the customisation of their product offering (Molefi, 2007: 27).

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Good Day. I am …...We are conducting a research project on the convenience store at this service station. Could I ask you a few questions about your shopping experience? It will take approximately 5 minutes.

Service Station: ……………………………………………………………………......

1. At what time of the day do you usually visit the convenience store?

   Weekdays before 9am 1

   Weekdays 9am – 6pm 2

   Weekdays after 6pm 3

   Weekends 4

2. How long does it usually take you to get to the convenience store?
   (Total distance from your home/work as a base)

   5 km/less 1

   5-15 km 2

   15-30 km 3

   30-50km 4

   50+km 5

3. How often do you visit an Engen Garage

   Everyday 1

   Once a week 2

   Two/more x a week 3

   Once a month 4

   Less often than 1x month 5

4. How often do you go inside an Engen Quick Shop?

   Everyday 1

   Once a week 2

   Two/more x a week 3

   Once a month 4

   Less often than 1x month 5

5. How much time do you usually spend inside the convenience store? 5 Minutes or less 1

5-10 Minutes 2

10-15 Minutes 3

More than 15 Minutes 4

6. What do you usually buy at convenience shops? *(Can be more than one)*

Bread/Milk	1	Sweets	3	Chips	5	Tobacco	7
Reading Material	2	Chocolates	4	Airtome	6	Cold Drinks	8
Other (specify)							9

7. Which of these facilities do you normally use, when visiting a service station? *(Can be more than one)*

Petrol	1	ATM	3	Public Telephone	5
Car Wash	2	Toilets	4	Car Workshop	6
Quick Service Shop	7	Other (specify)			8

8. Which 3 of the following THREE are most important to you when visiting a QS store? *(Circle 3)*

Safety	1	Selection	3	Atmosphere	5	Parking	7
Price	2	Service	4	Promotions	6	Time	8

9. How much do you agree or disagree with the following statements:

When thinking of prices at the convenience store:	Strongly disagree	Somewhat disagree	Neither agree Or disagree	Somewhat agree	Strongly agree
Most prices are fair	1	2	3	4	5
Business could charge lower prices and still be profitable	1	2	3	4	5
Most products are reasonable considering the high cost of business	1	2	3	4	5
Most products I buy are overpriced	1	2	3	4	5

10. How satisfied are you with:

Level of satisfaction	Very	Somewhat	Neither	Somewhat	Very

with:	dissatisfied	dissatisfied	satisfied Nor dissatisfied	satisfied	satisfied
The quality of most products available to buy at convenience stores	1	2	3	4	5
The selling conditions at most of the stores where I buy	1	2	3	4	5

11. How often do you visit each of the other service station's convenience stores?

	Daily	2x/More often per week	Once a week	Once a month	Less often
Shell Select Stores	1	2	3	4	5
BP Express	1	2	3	4	5
Total la Boutique	1	2	3	4	5
Excel Excelshop	1	2	3	4	5
Caltex Star mart	1	2	3	4	5
Sasol	1	2	3	4	

12. How does Engen compare with each of the other convenience store available?

	Much better	Somewhat better	Neither better nor worse	Somewhat worse	Much worse
Engen	1	2	3	4	5

AGE	0-15 - 1	16-30 = 2	31-45 - 3	46+ - 4	
INCOME	Up to R2000 -1	R2001-R5000 - 2	R5001-R10 000 - 3	R10 000-R20 000 - 4	R 20 000+ - 5
HOME LANGAGE	Afrikaans - 1	English - 2	Xhosa - 3	Other (specify) - 4	
GENDER *(by observation)*	Male - 1	Female - 2			
POPULATION GROUP *(by observation)*	White = 1	Black - 2	Coloured - 3	Asian - 4	Other (specify) - 5

13. What is the most important reason for choosing to visit this particular shop?

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………………………………………………………………………

THANK RESPONDENT AND CLOSE INTERVIEW

Suzette van Zyl
SZ Research cc
28A Upper Kloof St
Oranjezicht 8001
(021) 423 2754
Cell: 082 828 6463

3/1/2010
Engen Service Station

This is to certify that ……………………………………………..
is representing SZ Research, a market research company. We are assisting Mr John Bailey of Engen Chemical with a market research project, in order to complete his Masters Degree. We also have the permission of Mr Dean Ford of Engen.
Mr John Bailey may be reached at the following numbers:
Engen Chemicals (021) 403 4176
Cell: 083 258 5115
Email: john.bailey@engenoil.com

The interviewer needs to complete a small number of interviews with customers visiting the Quick Service Shop at this service station. The interview will take less than five minutes of the customer's time.

Should the customer not want to participate, the interviewer will not harass the customer or try and force him/her to participate.

We thank you for your cooperation.

Kind Regards

Suzette van Zyl
SZ Research cc