

Drivers for Customer Experience in Petro Retailing



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Santanu Purohit
Arvind Kumar Jain
University of Petroleum & Energy Studies
(purohits13@gmail.com)
(akjain@ddn.upes.ac.in)

Many far-reaching trends are disrupting the retail fuel markets across the world. These trends are accentuated by the rise of alternative energy (renewable, electric), emerging models in mobility (shared mobility), and heightened customer expectations converging around convenience and personalization. Customers express the need to recognize each individual and tailor products and services to their individual needs. Digital will play a dominant role in the emerging scenario. The ongoing shifts will alter the contours of competitive advantage in the industry and require a transformation of the existing business model. Customer buying behavior is changing over a period of time with the advancement of technology. Accordingly, drivers influencing the customer experience have also evolved and required identification and validation.

Keywords: Consumer Experience, Indian Fuel Retail, Digitization in Petro Retail, Customer Experience Drivers

1. Introduction

Customer experience plays a vital role in the service industry, and it is becoming more important day by day. With the broad exposure to technological advances, Indian customers' behavior is changing to value their money. In earlier days, Indian petro retailing was predominantly within public sector companies, and it was a commodity product. With the introduction of de-regularisation of prices and the inflow of private global players in the Indian market, Petro Retail is no longer a commodity product (Purohit & Jain, 2020). Instead, it has become a value-based service proposition. In such competitive scenarios, the service becomes a prominent role in getting more customers, providing a better experience, and retaining loyal customers.

Many drivers influence customer experience while obtaining the services. It is valid for petro retailing as well. These drivers change for controlling customer experience with time, technological advancements, etc.

Our study aims to identify the drivers that influence Indian petro retail customers' experience and evaluate them according to their prominence, based on the degree of influence on customer experience.

2. Scope of the Study

The study helps retail petroleum companies to know their customers' attitudes and factors influencing their fueling experience. The study shall also help the companies to develop suitable processes and design facilities to offer a better fueling experience to their customers in the growing competitive scenario.

3. Limitation of the Study

Though it tried to capture customers from Metro and non-Metro cities, the focus is predominantly on the 4-wheeler and 2-wheeler customer segments. Our study is constructed on primary data collected through a survey. The survey result is subjected to all the limitations of primary data.

4. Literature Review

The market structure of developed economies has undergone significant changes over the last few decades in terms of transformation from manufacturing physical goods to intangible services. This is evident from the rise in the service industry all across the globe. Major manufacturing and service industries have observed deregulation globally, such as communication, transportation, energy, and banking, leading to intense competition in these sectors (Kotler, 2004). The solution to price competition has been to develop a differentiated offer and delivery that includes innovative features to serve more effectively in the competitive market and set the company apart from the competition with a higher Brand image (Kotler et al., 1996). A service firm can differentiate itself by delivering consistently higher service quality than its competitor in the marketplace. Many companies have found that a potent competitive advantage can be created through outstanding service quality and leading leadership in sales and profit. Indeed, some firms are increasingly focusing their energy on building customer loyalty by offering superior quality service to their competitors (Purohit, 2022).

4.1 Retail in the Global Context

Global retail has observed a significant change in the last few decades due to technological advancement, customer habits, expectations, etc. Accordingly, customer service has also undergone a considerable change. Technology and digital space have also significantly impacted consumer decision-making (Purohit & Jain, 2020). Customers are more evolved & demanding more preferred digital technology-led solutions [Purohit & Jain, 2021]. Additionally, an important role is being played by social media in marketing. Companies use social media to strengthen their brand and create more sustainable customer relationships (Moran *et al.*, 2014). Firms nowadays use social media extensively to connect with their customers more personalized and directly.

Moreover, there is an increasing trend toward sharing customer information among different service industries to assess Customer buying patterns, thereby designing and delivering timely customized services to the target segments to enhance their customer experience to better service offers (Bigelow, 2019). This has been made possible via the increasingly sophisticated Customer targeting algorithms of major digital firms like Google and Facebook.

4.2 Petro Retail in Global Context

Globally, Petro retail has undergone a considerable change. Some factors continue to play a historically significant role (e.g., price, quality, etc.), while some factors have emerged due to increasing competition or technological advancement. Petro retail has also observed a significant change from commoditized to service-based market globally, which is equally applicable to the Indian Context (Purohit & Jain, 2021).

Price remains critical, and the customer buying decision is impacted by the availability of price information centrally in the Context of the USA (Chandra & Tappata, 2011). It has also been observed that in a de-regularised scenario, the price of fuel, especially diesel, is lower in more competitive local markets in the Austrian Context. (Jens *et al.* 2018). In the decision-making process for fuel purchase by the customer, apart from the introductory offer such as the quality of fuel, the proximity of the fuel station plays a vital role in selecting a fuel station for fuel purchase (Petra *et al.*, 2017). Geographic representation of fuel retail stations and consumer perception of customer convenience play an essential role in buying decisions (Marc *et al.*, 2012).

Efficiency in fuel station's forecourt operation is also significant from a customer perception & satisfaction perspective. Inadequate staffing, inefficient fuel pumps, and queuing at fuel stations are common factors leading to insufficient service delivery in the Nigerian Context (Ajayi, 2017). However, in the American and European Context, petro retail has undergone a huge technological advancement, giving an edge to forecourt efficiency and leading to customer satisfaction and a richer experience. The introduction of fully automated service stations in European countries, which do not require cashiers, led to lower prices and benefitted customers. Similarly, in American Context, the introduction of self-service pumps drastically reduced the number of attendants at fuel stations by shifting the work done by these attendants to the customer. This has facilitated differentiating the customer buying experience and attaining upward productivity growth (Emek *et al.*, 2017).

Another significant trend that has emerged over the past few decades is the loyalty program. Customers have observed that fuel supply organizations offer loyalty programs to build loyalty and increase repeat purchases. A study in the South African Context (Mgiba & Madela, 2020) has shown that the effectiveness of the loyalty program influences customer perception, satisfaction, and repurchase decision. In this Context, sharing global positioning data of fuel customers among multiple inter-disciplinary industries allows for designing better services to enhance customers' experience based on their purchase patterns. (Bigelow, 2019).

4.3 Retail & Petro Retail in Asian Context

Given the significant economic and technological evolution in major Asian countries over the past few decades, their retail markets have also experienced rapid technological advancement and implementation shifts. Customers expect innovative customer experience for brand differentiation, and companies that are successful in doing so are gaining an advantage over the competition (Tivasuradej & Nam Pham, 2019). Customer satisfaction, brand trust, and brand image influence customer loyalty in Malaysia recommended that fulfilling customer expectations are the main priority to retain and enhance customer loyalty. (Azizan & Yusr, 2019).

The fuel retail sector has also massively undergone the adoption of upgraded technology. Apart from the essential requirement for fuel purchase, technology usage,

payment solutions & facilities, and availability of integrated convenience stores at fuel stations have helped build customer patronage of hybrid petrol and convenience retail in Malaysia (Sari *et al.* 2017).

4.4 Retail & Petro Retail in the Indian Context

Today, the retail sector in India is witnessing a massive revamping exercise as traditional retailers make way for new formats. These modern retail formats provide an extensive assortment to customers and offer an ideal buying experience with a consolidation of product, entertainment, and service, all under a single roof. International exposure and availability of products and brand communication are the attributes driving organized retail in India, preferred due to convenience and variety. The demographics, double income, urbanization, and internet revolution contribute to retail growth in India (Sahney, 2016). The organized Indian retail sector is growing very fast, and consumer shopping behavioral dimensions are also undergoing rapid changes (Sangvikar & Katole, 2012). Most customers prefer purchasing from organized retail outlets in India over unorganized ones. Most of them are satisfied with the quality of service, price and product range of the goods provided by organized retail outlets. Studies also revealed that the customers prefer organized retailing over unorganized retailing and that this preference is there in tier 1 & 2 cities as well (Dinesh Kumar & Vikkraman, 2012).

This demonstrates that the Indian economy has evolved over the decades. Indian customer has become more discerning while remaining price-sensitive. For an essential and more significant segment of Customers in India, the modern lifestyle has significantly impacted modern retailing, despite its cost-effectiveness. Hence, identification of different lifestyles and socioeconomic strata of the customers & shopping patterns are required for understanding customer buying behavior as the customer continues to expect a better shopping experience, recreation, friendly interactions and a wide choice of products and services (Menaka & Chandramana, 2014).

In the Context of Indian Fuel Retail, the market was traditionally dominated by Indian public sector companies. However, the entry of private players has changed this dynamic via the availability of improved customer service facilities to end customers. Competition from private oil marketing companies is forcing public marketing companies to change from just selling fuel to satisfying customers through marketing and promotional activities. There is some mismatch in the preferences of the retail mix of customers and those adopted by OMCs to market their products and services (Yadav *et al.*, 2012). Petroleum corporations are more competitive now, introducing a variety of schemes to attract customers and fulfill their expectations towards fuel consumption. At the same time, Government liberalized the policy for the private petroleum corporations to establish their retail outlets, bringing more competition among the service providers (Firms). (Srinivasan, 2015).

It has been observed that four key determinant factors influence customer selection of fuel outlets across cosmopolitan cities. The basic Product level (Quality & Quantity), Expected Product level (Allied services), Augmented Product level (additional product attributes and benefits), and the potential product level include all the augmentations and transformations (Raj *et al.* 2013). Associated services like air pressure checking, vehicle cleaning, and convenience store are also the prime need of

consumers. Retail fuel companies need to strategize & offer services accordingly to retain their customers. (Kumari &Devi, 2016). Though the consumers' primary consideration is the quality and quantity of the fuel, other allied facilities, such as air pressure checking, windshield cleaning, mechanic facility, and refreshment facility, are also the prime need of consumers (Kavitha & Mary, 2018). Quality and quantity of fuel is the major expectation of consumer satisfaction, and other additional facilities like restrooms, ATMs, and air pressure play an important role in retaining customers. (Priyadharshini & Divya, 2019). It has also been observed that among the services provided by the modernized petrol stations, the ATM service facility got the first rank among the respondents. Modernized petrol stations have vastly increased their sales by providing many services. (Ganapathi, 2012).

The study has shown that fuel station management, Price of Fuel, and Technology adoption in services are critical factors that significantly influence retail petrol consumption in India. Other factors such as fuel station image, service quality, product assortment, and additional benefits closely correlate with consumer preference (Purohit & Jain, 2021). Technology adoption influences the customers' buying behavior. Service providers must also invest more attention in developing technology-based infrastructure and services to meet the evolving behaviour and requirement of Indian petro retail customers (Purohit & Jain, 2021). The usage of IoT& AI in petro retailing has improved customer experience and operational efficiency (Purohit *et al.*, 2021). IOTs have also significantly impacted service excellence and profit maximization (Purohit & Jain, 2021). It is also observed that a gap exists in the adoption of digital payment technology in petro retailing in the Indian Context. In contrast, it is widely accepted in the general retail sector (Purohit & Purohit, 2021).

A study on the service quality Gap in the Indian petro retail business showed that overall service quality received is low compared to expected service quality and that a service gap exists. The maximum gap found is for the tangibles dimension, while the lowest is responsiveness (Badlani & Singhal, 2017). However, studies so far indicate the customer's perspective where a gap exists in identifying the service quality dimension from the provider's perspective (Purohit & Jain, 2022). It has also been reported that service providers have evolved their service delivery protocols over time with the enhancement of technology adoption in their service design & delivery (Purohit & Jain, 2021).

5. Research Methodology

The study was conducted from September – to November 2021 and was shown at various fuel stations in Mumbai (Metro) and Ranchi (non-metro). The sample scope selected for the study was 400 for each city. The convenience sampling method was used to determine the sample. The primary data was collected through a Quantitative field study, and the statistical tools used are:

1. Simple Percentage Analysis
2. NPS (Net Promoter Score)
3. Regression analysis

5.1 Research Framework

As a part of the research framework, adopted "observational studies". At the same time, customers are inside the fuel station and "Exit Interview" during their exit from

the fuel station after the fueling transaction to capture their feedback. Observations have been made across various fueling outlets in the cities. While for the Exit interviews, customers coming out of the fuel stations (2-wheelers & 4-wheelers) were administered a short questionnaire at the exit point of the station. Observation studies and exit interviews were spread across the day to ensure peak traffic and low traffic periods.

- The process adopted during the Observational Studies
- Time/Vehicle/Gender-based trends over peak & non-peak at Fuel stations spread across weekdays & weekends
 - Customer interactions with the RO touch points
 - Environment influence on customer emotions
 - Observation at the same petrol pump across various fueling outlets
 - Spread across the day to ensure peak traffic and low traffic periods of the day
 - Customers coming to the fuel stations (2-wheelers & 4-wheelers) were administered a short questionnaire at the Entry & exit point of the outlet
 - Spread across the day, both peak traffic and low traffic periods of the day
 - The process adopted during the Exit Interviews
 - Structured questionnaire for
 - Customer Satisfaction & Net Promoter Score based on the survey data
 - Experience Rating on important service parameters – queue, payment, staff behavior, the appearance of fuel station
 - Top reasons to visit the fuel station and regularity

Table 1 Sample Design

City	Sample Size (Target)	Observation Sample	Exit Sample
		(Achieved)	(Achieved)
Mumbai	400	422	420
Ranchi	400	403	401
Total	800	825	821

Fundamental matrices captured in the observation module are

- Customer profile (Vehicle, Gender, Age)
- At the entry point (Ease of aisle identification, Aisle Guidance, Response)
- While in the queue (Number of vehicles ahead in the queue, discomfort)
- At the fueling point (Greeting, Fuel order, Attentiveness of staff & Customer, 'O' Check)
- Payment & Billing (Initiation time, Type of Bill)
- Services used (Services used (Air filling, Windscreen cleaning)
- Exit Point (Total time spent, difficulty during exit, Overall Interaction)

Similarly, the matrices observed in the Exit module are

- Customer profile (Vehicle, Gender)
- Current engagement levels (Brand Name, Regular Fuel Pump)
- Willingness to Recommend (NPS)
- Feedback on parameters: Experience, Speed, Queue management
- Reason for visiting the outlet (on that specific day)

6. Research Findings

During the observation module, the study has been made based on the vehicle (type of vehicle, types of 2wheelers, types of cars) and on the customer profile (gender of the driver, demography of the driver, the person who is driving, i.e., own driven or Chauffer driven). The sample size covered 53% two where and 47% of four-wheeler users. The sample covered both genders and all the age groups of the customers. It also covered the different segments of 2-wheeler users and also regular & premium segments of the car population.



Figure 1 Data Analysis

Table 2 Customer Response at the Entry Point

Entry Point		Response	Response detail	
	How stress-free was it for the customer to identify the aisle?	86%	Easily identified the aisle	✓ Slowed down to check which aisle to go: 8% ✓ Shifted from one aisle to another: 5% ✓ Honked/ Called/ Gestured for attention: 3%
	Did any staff provide aisle guidance?	45%	Yes, guidance was provided	• No guidance provided: 55% • Could not be determined: 1%
	Customer's response to guidance	91%	Followed instructions with no reluctance	• Followed but debated: 7% • Debated & did not follow: 1% • Did not debate, but did not follow: 1%

The study indicated that when the customers were at the entry point, it was easy for customers to identify the aisle, but there was a lack of guidance to the appropriate aisle they needed to proceed. However, most customers have followed the instruction where ever guidance is provided.

The study revealed that while the customers are in the queue, they have displayed their discomfort. A probable reason may be the slow service at the fuel station.

Table 3 Customer Response in Queue

In Queue		Response	Response detail
	No. of vehicles ahead in the queue	1.6	Average
	Wait Time Discomfort	5%	Yes, the customer displayed discomfort
	Was the customer speaking on mobile while in the queue?	10%	Yes, the customer was speaking on mobile

It has also been observed that customers at the fueling point, in most cases, were not greeted or needed to call the attendant for fuel to start. It is observed that most car customers (almost 58%) stepped down from the vehicle before beginning the fueling. It indicates a lack of customer confidence in the fueling process for ensuring delivery quantity.

Table 4 Customer Response at the Fueling Point

Fueling point		Response	Response detail
	Did the customer have to call staff for attention?	18%	Yes, the customer had to call staff
	Greeting by Staff	44%	Yes, the customer was greeted
	Customer's action post reaching fueling point (Cars only)	58%	Stepped down from the vehicle

It was found that the majority of the customers switched off their cars (68%) and looked at the fuel dispensing pump meter reading (98%) before fueling was started. That indicates the attentiveness of the customers during the fueling process.

Table 5 Customer Response on Checking the Initial Point of Fueling

Checking the initial point of fueling		Response	Response detail
	Did the customer check 'O' read proactively?	82%	
	Did the Staff show 'O' read on the meter?	84%	
	Did the customer check 'O' after being shown by staff?	94%	Stepped down from the vehicle

90% of consumers checked the 'O' read at the fuel outlet before the commencement of fueling either proactively or as shown by the staff. This process confirms part of the quantity being served. Out of the 10%, who did not check the reading, 4% either reviewed or argued with staff subsequently. In the process of checking the initial meter reading by the car customers

- 55% of customers stepped out of the car.
- 27% of customers showed a lenient attitude and observed from the seat.
- 13% of the customers turned back from their seats to check the reading.
- In 5% of cases, it is the Co-passenger who checked the reading.

When it comes to the payment initiation part, the majority of customers initiate payment post completion of fueling (78%), very little initiate before the fueling (14%), and the rest (8%) have been observed initiated during the fueling. The study also observed that most customers prefer to pay by cash (77%) followed by Card (19%). Very few customers have used their mobile apps or other modes (4%) for payment. However, card usage as a payment instrument is higher in Mumbai at 26%. It has also been observed that for every three out of five consumers, who paid by Card or Mobile app, there was a delay in providing a card machine/ QR code by the attendance.

For every 1 out of 4 customers, there was a delay in providing the bill on the billing part. Bill confirms the instrument towards proof of service quantitatively to build customer confidence. About 37% of customers were given a bill of some sort. In 4% of cases, the customer had asked for a bill, but it was not made available, and in the majority of instances, the bill was not provided (59%).

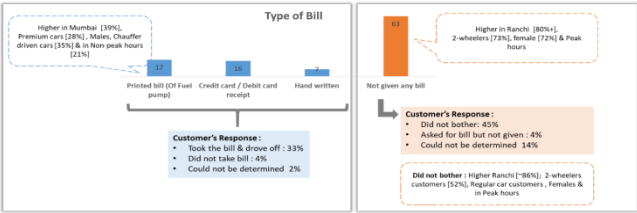


Figure 2 Customer Response to the Bill

To availing of allied services, it has also been observed that about 1 in every five customers used the air filling service, amongst whom 41% had to call the attention of the staff. Amongst cases when there was an explicit requirement for windscreen cleaning happened in only 53% of the cases. In about half the circumstances, a windscreen cleaning facility was not available at the outlets. Thus, windscreen cleaning occurred for only 17% of the cars. It has also been observed that 94% of customers have not availed of any other services.

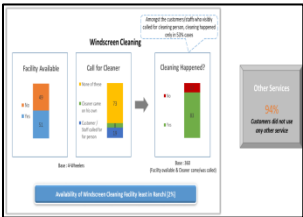


Figure 3 Availability of Windscreen Facility

While exiting the fuel station, 5% of customers faced the difficulty, and it is more in Mumbai and with premium & owner-driven cars. Also, the dispenser is on the driver's side, i.e., fuel tank is on the other side of the vehicle. Possible reasons for this are the high traffic on the road (68%) and traffic signal nearby, exit lane is not streamlined, or car in front had stopped.

During the Exit Interview process, it was observed that 72% of the customers are regular visitors of the particular fuel station. It has also been observed that other than the proximity of the fuel station, perception of service quality and availability of facilities played an important role in selecting the fuel station.

Table 6 Customer Response on the Reason for Visiting the Fuel Station

Reasons for visiting the outlet	%
Location (Proximity/ On the way)	43
On the way home	13
Proximity to home	13
On the way to the office/ workplace	10
Proximity to office/workplace	8
Service at outlet	25
Good staff behavior	9
Quick service	12
Well managed & clutter-free	4
Facilities available	16
Air filling facility	8
Automated / Digital Billing	3
Availability of additional service	3
Toilets at outlet	2
Assurance of quality and quantity	14

The Net Promoter Score Method analysis showed that Low NPS is observed for a two-wheeler, Commercial cars, premium car segments and non-regular and female customers.



Figure 4 NPS Analysis

The overall Customer Experience analysis evaluation showed that almost 75% of the customers who visited are regular customers of that outlet. Assurance of quality & quantity is the most critical factor driving the choice of a fuel outlet, followed by location and quick service. While NPS amongst customers visiting the fuel station where the survey was carried out is 53, NPS is lower amongst 2-wheeler customers, Commercial cars, Premium cars, Females, and Non-regular customers. Amongst the various facilities at the outlets, satisfaction is on the more downside on washrooms,

drinking water facility and in & out stores. Interestingly, at the exit point, only 66% of the customers could recollect the brand of the fuel outlet they had visited, reflecting low brand recall for the providers in customers' minds.

Staff behaviour, queue management, payment process, the fuel station's appearance, and the Speed of services have been given importance by the customers.

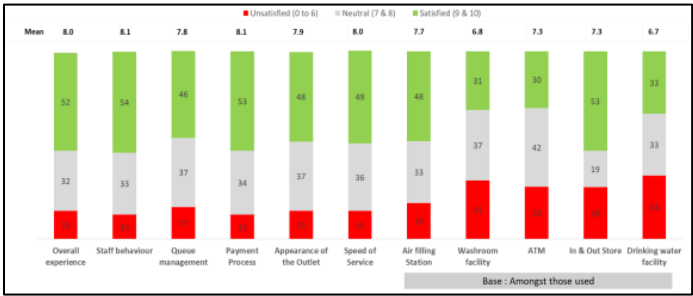


Figure 5 Customer Experience on Facilities Availed

7. Result & Discussion

Post merging the data from both observations & exit the modules, outlets with NPS scores of 75 & above were classified as 'High NPS' & outlets with NPS scores of less than 25 were classified as 'Low NPS'. Each parameter was analyzed to determine key differences between outlets with High vs Low Net Promoter scores. It was evident that about 75% of the customers who visited are regular customers of that outlet and assurance of quality & quantity is the most critical factor driving the choice of a fuel outlet, followed by location and quick services. The average NPS amongst customers visiting the fuel stations is 53. NPS is lower amongst 2-wheeler customers, commercial cars, premium cars, female customers, and non-regular customers. Among the various facilities at the outlets, satisfaction is lower in Washrooms, Drinking water facilities, and Convenience stores. Interestingly, at the exit point, only 66% of the customers could recollect the brand of the fuel outlet that they had visited.

It is thus evident that a set of drivers influence customer experience. On each of the various parameters, data were regressed to reach scores on overall experience on that specific day to arrive at drivers to the customer experience.

Table 7 Customer response on the Drivers to Experience

Drivers to Experience	2-Wheelers	4-Wheelers (Commercial)	4-Wheelers (Private)
Staff Behaviors	29%	37%	30%
Speed of Service	27%	43%	27%
Payment Process	22%	18%	26%
Appearance of the outlet	19%	2%	11%
Queue management	3%	0%	6%

Table 8 R² Value to the Drivers to Experience

Drivers to Experience	R ² Value
Staff Behaviors	0.597
Speed of Service	0.677
Payment Process	0.621
The appearance of the outlet	0.653
Queue management	0.543

R² value has also been calculated for all the drivers and observed in the range of 0.543 to 0.677, indicating that all the drivers are significant.

8. Conclusion

The study and analysis of the findings indicated five significant drivers for customer experience at fuel stations. Four drivers, such as staff behavior, Speed of service, Appearance of the fuel station, and Payment process, have a good influence on the customer fueling experience. Queue Management has comparably low influence but correlates with Speed of service and the image of fast service in the customer’s mind. With the increasingly competitive environment in the petro retailing industry and introduction and development in the digital arena, these drivers are more relevant to Customer Experience in petro retailing. OMCs are required to work to create differentiation among the competitor and to get competitive advantages. At the same time, OMCs need to establish their brand recall in customers' minds.

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About Our Authors

Santanu Purohit is having an experience of 23 years in the industry and 3 years in research. He is currently working as Research Scholar in General Management with the University of Petroleum & Energy Studies, Dehradun. His areas of interest include consumer behavior, online buying, and marketing research among others. He is currently pursuing his doctoral research on service marketing in petro retail. He has contributed several papers in reputed national and international management journals. He has also presented papers at national & International level conferences.

Arvind Kumar Jain has more than two decades of experience in academics and research. He is currently working as Sr Associate Professor in the Business School at the University of Petroleum & Energy Studies, Dehradun. Apart from his doctoral research, he has contributed to research through several research papers and conference proceedings. He has guided several doctoral research students also. He has organized and mentored several seminars, workshops, conferences and management programs across a spectrum of subjects.