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The forecourt advantage

Why petrol stations are becoming SA's most powerful ultimate convenience and impulse retail channel

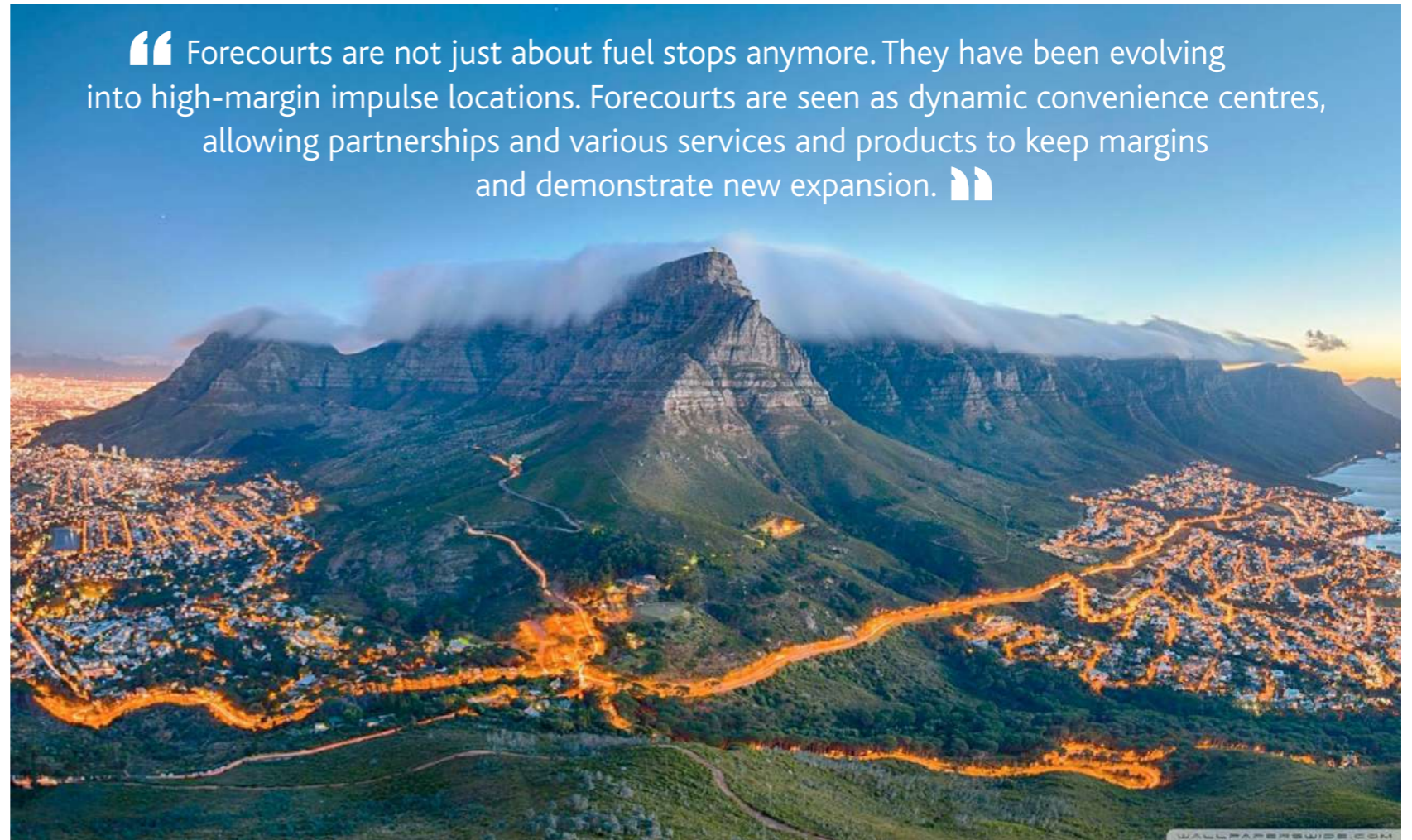
Ultimately, almost everything we knew about petrol stations has changed, at least not the filling up our tanks part. Forecourts are clearly offering way more these days, it isn't just about fuel stops anymore. These places have been evolving recently into high-margin impulse locations. Given their long operating hours, usually 24 hours, (captive dwell time) the duration an audience is forced to remain in a specific location and a varied consumer base, the placement of these forecourts is deliberately done to monetise impulse behaviour.

Trade Intelligence gave us their latest report, on Forecourt Retail Report, shedding light on an outlet that is under pressure, however, keeps adapting. Forecourts are seen as dynamic convenience centres, allowing partnerships and various services and products to keep margins and demonstrate new expansion. Fuel once dominated and defined the forecourt; not so much anymore.

Looking beyond the fuel: Understanding foot traffic dynamics

According to the research conducted by Trade Intelligence it says, while fuel numbers have declined by 6.3% over the past year, the number of South African forecourts has grown by +12%

“Forecourts are not just about fuel stops anymore. They have been evolving into high-margin impulse locations. Forecourts are seen as dynamic convenience centres, allowing partnerships and various services and products to keep margins and demonstrate new expansion.”



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over five years. Trade Intelligence Forecourt Report went on to say it is estimated that Forecourt Retail Convenience sales accounted for R33 billion in sales. The report shows that 75% of surveyed shoppers intend to keep or increase their visit frequency to this channel, highlighting its growing relevance to shoppers and consumers.



Kirsten Minnaar

Daily Investor journalist, Kirsten Minnaar, pointed out a gradual growth, which is influenced by the changing consumer needs and demands. Safety, speed and convenience are what shoppers look for now,



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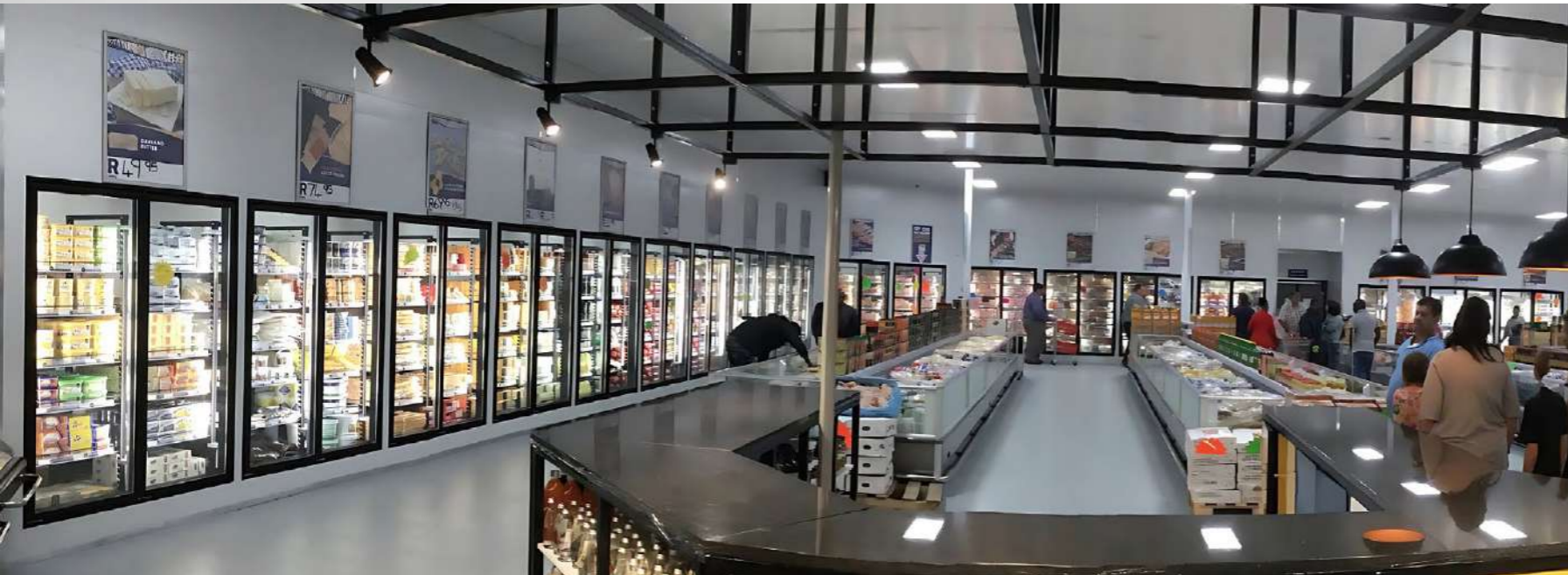
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more so while commuting and during late nights. Many forecourts across the country have responded to this, very well by expanding their product variation and providing more options like grab-and-go, healthy-for-you snacks, branded coffee collaborations and better shopping experiences. For producers, performance and execution of trade strategy or method in this industry, can be simpler and increase margins, all thanks to better reinforcement and streamlined retailer structures.



Karen Keylock

She went on to further say, Nedbank national retail services manager Karen Keylock, on South Africa's hidden retail giant, Fuel Retail Association.co.za, recently explained that the fuel retail sector has been in decline for several years. She said this decline, which is happening for various reasons, is expected to continue.

"The long-term expectation is a 9.2% decline in global value to \$79 billion (R1.46 trillion) in 2030, driven by efficiency improvements, regulations to curb emissions, and the rise of electrification and shared mobility," Keylock said.

"On top of this, consumer behaviour is changing, with more people working from home and shopping online." Forecourt retailers are being proactive by driving footfall and sales to counteract the wider decline in fuel spend. Retail sales here, increased by 4% (and by 8.5% in 2023), completely outperforming total FMCG increase; even with the -4% decline of fuel spend.



What's driving growth?

Retailers need to be on their toes, stay ahead and invest in three key pillars that many forecourt retailers are already seeing the benefits of. To attract and engage with shoppers, forecourt workers need to consider these:

- Retail partnerships with supermarket brands
- Loyalty programmes, often linked to financial or retail partners
- Value-added services, from fast-food outlets to parcel lockers and app-based deliveries

Retail partnerships at forecourts have increased +26% over the last five years. Forecourt retailers are leveraging partnerships with supermarket chains in a bid to attract shoppers. <https://www.tradeintelligence.co.za/>



Riaz Galant, commercial director at Achievement Awards Group, says that long-term customers have a higher lifetime value to companies, while acquiring a new customer can be between five and 25 times more expensive than retaining an existing one. This is why businesses invest heavily in customer loyalty programmes. Unfortunately, many loyalty programmes don't really work, and while they may get customers back a few times, those customers need little persuading to switch to a competitor. An obvious but important point to make is that customer loyalty is a product of much more than a loyalty programme. No loyalty programme is going to help if your pricing is out of kilter, if your staff are unhelpful or rude, or if your return policy is unfair.

Read full article: <https://www.bizcommunity.com/article/why-most-loyalty-programmes-fail-to-turn-customers-into-lifelong-fans-589210a>

There are numerous strategies that are contributing to the performance of forecourt retailers:

- New store openings and revamps aligned with shopper expectations is key
- Retail partnerships that build trust and expand assortment: Engen x Woolworths; BP x Pick n Pay Express; Astron x FreshStop, Shell x Vida e and Torrador by Vida e Caffè – These partnerships and collaborations foster a level of trust and familiarity for shoppers
- QSR & Coffee partnerships with Seattle, Wild Bean Café, Vida e Caffè, Wimpy and others
- Loyalty programmes and banking/retail partnerships, merging fuel and grocery incentives for rewards and cashback
- Value-added services, such as courier collection (e.g. PUDO), car wash, play areas, workspaces, charging spots, entertainment and seating



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With sales growth, increasing points of distribution, evolving shopper tasks, and strategies to drive greater foot traffic, forecourt convenience represents a high-value opportunity for FMCG manufacturers.

But are brands capitalising on it? Unfortunately, not, most brands haven't been capitalising on this.

Speed has become the new currency

With speed replacing what we know as currency, this has opened impulse and convenience in SA retail more than we could imagine. The level of shopping has not decreased; however, the speed of shopping has increased rapidly. We are in the era where every second and minute counts, speed is a form of value on its own now; time wasted is like money wasted at this point.

Immediate satisfaction, limited friction and visible decision cues now shape how shoppers engage with retail environments, particularly in forecourts, convenience stores and high-traffic areas. Shoppers want to feel free, while enjoying seamless and comfortable shopping experiences. On the other hand, for retailers and manufacturers, knowing and understanding this change is key to unlocking impulse spendings and influencing sustainable category rise.

If you imagine the average South African, they don't have time on their hands, they have the information at their disposal and care about value and are aware of it. People often travel for long (to work and home), flexible hours, digital connectivity and the growth of hybrid retail methods have



Young shoppers engage across multiple platforms, including their go-to delivery apps, before they make a decision.
www.tradeintelligence.co.za/

increased the demand for easy shopping experiences. Shoppers may be careful with planned buys; however, they are swift to swipe/tap their bank cards when the experience is speedy, simple and relevant to their instant needs.

In this landscape, shoppers assume that they will enter, choose and checkout in minutes or even better, seconds later. They do not expect to spend minutes or even worse, hours at the store. Majority of shops, have familiar brands and intuitive store design which lessens time spent on deciding. Smaller packs with clear price cues, cut down on comparison shopping. Strong front-of-store and checkout placement turn exposure into impulse spend. Speed isn't just convenience alone, it is about having the edge, a competitive advantage above others.



Michelle Binedell

Ultimate convenience focus

According to Michelle Binedell, Technology and Innovation Manager at South African Canegrowers balancing speed, accessibility and value is key, and she

explained it further by saying, "for Canegrowers, ultimate convenience has translated into a ready-to-drink format that transforms raw sugarcane into a portable, ergonomic energy solution (this solution focuses on designing work environments, tools, and systems that align with human physical and cognitive capabilities to minimise strain, fatigue, and injury, thereby maximising efficiency and productivity).

"By choosing recyclable aluminium over plastic, we ensure our packaging is as sustainable as our ingredients whilst giving the consumer the ability to conveniently discard with conscience!

"Speed and accessibility are achieved through a hybrid distribution network, ensuring the product is widely available through online platforms, forecourts and retail outlets.



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Finally, value is maintained by emphasising pure-sugarcane quality. Shesha justifies a price point that supports wide-scale distribution while ensuring the consumer receives a superior, health-conscious benefit.”

The new impulse powerhouse – Forecourts

The trend is clear, and if retailers haven’t seen this trend, then this is your opportunity to. Forecourts are diverse nowadays; they are not only for filling up the petrol tank; they are high-frequency retail hubs that influence shopper spending even when they are on the move/road.

Given the lengthy trading hours, some are even open 24 hours, regular-to-heavy local traffic, and a fitting captive audience, forecourts shine in moments of urgency and convenience more than most conventional retail methods.

Forecourts are highly strong for impulse buys; they are unique and due to this:

Built-in stay time: Consumers pause — to fuel, rest or regroup — increasing the window for unplanned purchase decisions. From checking the car during a long journey, pick up or waiting for friends & family, etc.

Urgent need states: Thirst, hunger, forgetfulness or schedule pressure create immediate purchase intent.

Convenience premium: Shoppers are more willing to pay a premium when speed and accessibility are core to the experience. Rather than finding a Spar



or Pick ‘n Pay and waiting in long queues with other people that are there to buy their groceries for instance.

High-visibility zones: Queue rails, coffee counters, sweets and chocolates, chilled beverages, mini packs and hot foods are natural impulse triggers.

Savvy retailers win by not only offering more choice or variation, but it is also about offering the right choice and at the right time.

Michelle Binedall, when asked about the key strategic decisions that shaped their business from the beginning, answered, “We knew consumers wanted the natural vigour of cane juice, but it had to be convenient and shelf stable. Through a significant amount of R&D, we finalised a formulation that preserves the natural goodness of cane juice whilst delivering sustained energy.”

Shoppers increasingly seek safety, speed, and convenience – especially during commutes or late-night purchasing. In response, forecourt retailers are expanding their product assortments and offering grab-and-go options, branded coffee partnerships, and improved overall shopping experiences. <https://southafricanlifestylemag.co.za/>

Looking at innovation and how heritage still plays a role in how the product is positioned and what the value perception for consumers is, she stated that “in an era where ‘natural’ is often

just a marketing buzzword, our century-long heritage in sustainable cane production provides a rare, unshakeable foundation for true innovation. We don’t just view sugarcane as a commodity; we treat it as a botanical treasure.

We honour the hand-harvested traditions of the farmers who have fed our communities for generations and have successfully pivoted our innovation strategy from ‘sweetener supplier’ to ‘nutrient stewards.’

We ensure that we utilise raw cane juice in its purest form, capturing the earthy complexity and retaining essential antioxidants and electrolytes – something that industrial, synthetic alternatives physically cannot replicate.

Using raw cane juice does more than just enhance flavour; it delivers value. Shesha is not

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Understanding and redefining impulse in a value-driven market

Impulse buying is not only about temptation and desire, as much as shoppers may crave certain items; it is about relevance, simplicity, and quick reasoning. Consumers are still looking for value; however, they are now evaluating it with a much wider lens which includes:

- Clear usage occasions
- Functional benefits
- Familiar brands they trust
- Simple price communication

However, time-pressed shoppers make decisions with little effort, if a products value is not clear or understood in a matter of seconds; regardless of where it is, shelf, fridge door or at the checkout, the purchase is likely not to happen.

Retailers need to be aware of what works, what doesn't and how can they improve their shelves.

Impulse success involves three conditions:

What works:

Visibility – Products must be in front of the shopper at key decision points.

Simplicity – Clear messaging that conveys benefit in under three seconds.

Accessibility – Price points, formats and pack sizes that match the need state.

<https://businesstech.co.za/>



What doesn't work:

- Overly complex message architecture.
- Range overload that leads to decision paralysis.
- Innovation that requires explanation or heavy discounting.
- Products that feel “expensive for what they are.”

It is important to know why this matters and why retailers and manufacturers need to take heed.

For manufacturers, the shift toward speed and convenience means designing products that:

- Communicate value immediately
- Are easy to merchandise in high-traffic zones
- Work across multiple need states (thirsty, hungry, forgot to get something on your way home/ work)

“ For retailers, having the skill to convert speed into spend is a major competitive advantage. The brands and formats that win in this environment are those that eliminate uncertainty, have less complexity and provide an intuitive reason to buy now. ”

In the South African retail context, impulse buying is winning however it is being redefined by speed, context and immediate relevance. Retailers who notice that speed is not just convenience, but a form of value itself, will unlock higher basket conversion, stronger loyalty and more sustainable margin growth.





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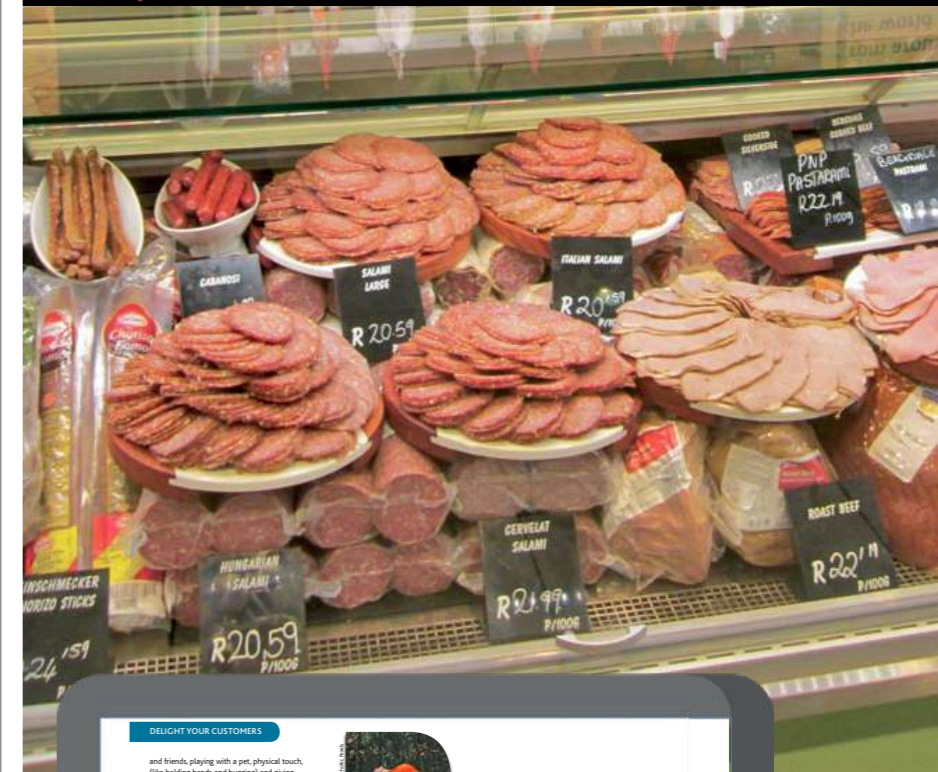
Conclusion

What matters the most at this moment, is being prepared for the next stage of ultimate convenience and impulse buys, especially as SA retail industry keeps evolving. Shoppers aren't window shopping; they are solving instant needs. It could be at a forecourt, neighbourhood convenience store or independent retailer, decisions are being made much faster. Which puts pressure on retailers to erase friction at every point, from the store design or layout and SKU selection to pricing communication and checkout flow. In this environment, transparency beats choice, and familiar, high-velocity products top complex or heavily rationalised ranges.

Shoppers do not often accept higher price points, unless it is convenient and it delivers reliability, speed and accessibility. This shows a wider opportunity across retail: impulse does not need heavy discounts, instead smarter performance and great understanding of consumer missions. Firstly, design stores and assortments based on speed, to counteract decision time, simpler ranges and highlight high-impact zones. Secondly, redefine value by removing blanket promotions on consistent pricing, clear pack-price cues and targeted deals that compensate behaviour instead of exhausting the margins. Lastly, leverage data and daypart insights to tailor assortments and merchandising to when and how shoppers buy.

Speed and precision are what the future of ultimate convenience and impulse buys in SA retail looks like, not pressure and hype. Retailers that have a good understanding of that consumers are keen to spend, yet only when purchasing feels seamless, justified and instant. Those retailers will be best placed to tap into sustainable growth. Invest now in speed-led methods, mission-based assortment and regulated value strategies will do more than protect your margins, it will grow relevance in a retail environment where time has developed into the most valuable currency above all. **SR**

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and friends, playing with a pet, physical touch (like holding hands and hugging) and giving compliments to others. It produces feelings of love and connection, and it's what binds human beings to each other.

While you need to think very carefully before you go out there and start hugging your customers, simple gestures like a handshake, or allowing a customer to feel a soft toy or similar can make a difference.

“A short personal chat can also work wonders, especially if it acknowledges that your customer is someone you know, recognise and appreciate.”

But it should also be obvious to you that simple acts of generosity and kindness achieve the same, especially if they hit some problem – like dropping some of their shopping, or being unable to find something, or reach something. But there is one very important factor that plays a role in this. Obviously, the person on the receiving end feels good, and the person who does something nice also gets a bit of serotonin (which makes it more likely that we pay it forward again). But even an *observed* act of kindness, someone being kind, and

To a lesser degree some fragrances or a massage also help. Come again, what you can do is obvious, and you can manage these things in your business without spending a fortune.

Now, one final word of advice ... unless you are like my dad whose need to understand the science was so important ... don't get caught up in the terminology and try to identify which chemical plays what role. We've looked at a bunch of things that you can do to create positive feelings that result in loyalty. ☺

And finally, **endorphin**, the pain killer chemical. ☺ Endorphins trigger positive emotions

don't have to do it every time. The principle of occasional reinforcement – a little surprise out of the blue – can also be potent.

“When we develop addictions – to gambling, eating, smoking, drugs, online gaming, ‘likes’ on social media, and so on, it's the dopamine that makes it so hard to stop.”

But you can also use dopamine effectively by celebrating things with your customers. Anything that you do to make them feel even a small win can trigger

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