Factors Encouraging and Discouraging Attendance at Farmers' Markets: An Application of The Kano Model

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ABSTRACT

Farmers' markets have become fashionable places for shopping, entertainment, and socialising, and in many cases are no longer sources of cheaper or more convenient shopping. With the growth of the craft and the organic food movements, such products are often marketed through farmers' markets. Entertainment (e.g., music) is also often provided. Such shopping locations often charge premium prices. Why farmers' markets have become so popular may be due to a variety of reasons such as shopping, entertainment, and socialising. Furthermore, a variety of different factors may cause customer satisfaction or dissatisfaction. This research is trying to identify what attracts customers to farmers' markets and what creates satisfaction for the customer. A quantitative, descriptive, cross sectional study was used, based on a sample of 1141 respondents from an e-mailed survey to an online-accessed panel of consumers provided by a commercial panel provider. It is also a comparative study between a developed nation (Germany) and a developing nation (South Africa). The research culminated in a Kano model for farmers' markets in each of the countries. There was considerable similarity in the 'delight' and 'performance' factors in the two countries, but only South Africa has 'basic' factors (two), while Germany had none. The study has thus contributed to knowledge about consumer behaviour and attitudes towards farmers' markets and has added to the literature on the use of the Kano model, especially in South Africa.

Keywords: retailing; Kano model; farmers' market; consumer behaviour; purchase behaviour

INTRODUCTION

Unconventional or non-traditional marketplaces such as farmers' markets, street markets (Watt & Dubbeld 2017), craft markets (Makhitha 2016) or flea markets (de Villiers, Visnenza & Phiri 2018) have been in existence for centuries in many countries and can even constitute the main shopping locations in developing nations (Renko & Petljak 2017). However, they have more recently become fashionable places for shopping, entertainment, and socialising, and in many cases are no longer sources of cheaper or convenient shopping. With the growth of the craft movement and the organic food movement (Makhitha 2016), such products are often marketed through farmers' markets, where entertainment (e.g., music) is often provided. Premium prices are often charged to cover the cost of said entertainment and other costs.

Research into these "alternative" markets has been quite extensive in developed countries, for example Italy (Cicatiello 2020; Gilli & Ferrari 2018; Pascucci, Cicatiello, Franco, Pancino & Marino 2011), New Zealand (Murphy 2011), United States (Byker, Shanks, Misyak, & Serrano 2012; Colasanti, Conner & Smalley 2010; Oths, Manzella,

Sheldon & Groves 2016; Garner 2018), Canada (Dodds, Holmes, Arunsopha, Chin, Le, Maung, & Shum 2014), United Kingdom (Qendro 2015; González and Dawson 2018; Gonzalez 2019), China (Lee and Pearce 2019); Spain (Onederra-Aramendi,   Begiristain-Zubillaga, & Malagón-Zaldua 2018); Portugal (Gomes 2019; Tam, Adrego, & Baptista 2019) and Germany (Bavorova, Unay Gailhard, & Lehberger 2016; Bavorova, Traikova, & Doms 2018; Irz, Leroy, Réquillart, & Solerb 2015).

Whether the growth in such informal markets has followed the same trend in developed countries as in developing countries is uncertain, as there is limited research on retail formats in South Africa (Sharma & Gautam, 2017) and no comparative studies between developed and developing countries have been found (de Villiers et al. 2018). In addition, it appears as if only a limited amount of research has been done in developing countries, for example, India (Petrescu and Bhatli 2013; Nabi & Kashif 2016); Malaysia (Tey et al. 2017; Hazlan et al. 2019); and Croatia (Renko & Petljak 2018). Furthermore, in developing countries such informal markets are often major shopping locations in their own right (Renko & Petljak 2017) due to a shortage of more formal shopping locations (Marumo & Mabuza 2018). Thus, there could be a variety of reasons why consumers attend these informal, alternative markets. Some examples would be shopping, entertainment and socialising, while a variety of different factors might contribute towards customer satisfaction or dissatisfaction (Murphy 2011).

The context of this research is a comparison of reasons for shopping at farmers' markets in a developed country (Germany) versus those in a developing country (South Africa). This will identify whether consumer goals for shopping in informal markets in developed countries have followed the same path as those in developing countries.

PURPOSE / OBJECTIVES OF THIS ARTICLE

The aim of this study is therefore to identify what attracts customers to farmers' markets and what the various factors are that create satisfaction for the customer, thus developing a better understanding of customer behaviour at farmers' markets.

The objectives of this study are therefore to:

1. identify what attracts customers to farmers' markets in a developed country (Germany) and a developing country (South Africa), i.e., what provides customer satisfaction?

2. identify what discourages customers from attending farmers' markets in a developed country (Germany) and a developing country (South Africa), i.e., what causes customer dissatisfaction.

3. identify, using the Kano model, what are 'basic' (must be), 'performance' and 'delighter' (attractive) factors for patronage of farmers' markets.

4. identify if the Kano model for farmers' market customer satisfaction differs for a developed country (Germany) from that of a developing country (South Africa).

5. provide marketing advice to farmers' market organisers, and to retailers at farmers' markets, differentiated between Germany and South Africa, if applicable.

LITERATURE REVIEW

Origin and definition of farmers' markets

According to Hall, Mitchell, Scott & Sharples (2008), farmers' markets have been around for a long time, but with the advent of the supermarket, this type of market became less popular. In recent times there has been a resurgence in these forms of market as consumers looked for a more transparent and authentic shopping experience. These days farmers' markets have enjoyed a resurgence in many parts of the world, with the public finding them attractive due to their uniqueness, alternative food offerings and as an enjoyable social outing (Murphy 2011)

The definition of a farmers' market is somewhat ambiguous. In some contexts, it is seen as a market that only offers a platform for local producers of home-grown products to display and sell their products. Renko & Petljak (2018) debate that a formal definition of a farmers' market is still nebulous with many terms used such as street, flea and informal markets, and even bazaar, being used to describe different forms of markets. The New Zealand Farmers' Market Association refers to a farmers' market as a space where stall holders may only sell items that they have either grown themselves or pickled, preserved or baked within a specific area (Murphy 2011), whereas in Ontario, Canada, a farmers' market is defined as "…a seasonal, multi-vendor, community driven (not private) organisation selling agricultural, food, art and craft products including home-made produce, home-made crafts and value-added products where the vendors are primary producers" (Hall et al. 2008). It appears that food generally makes up the largest section of sales at farmers' markets. However, non-food items are also popular, with items such as clothing, flowers and plants, toys, furniture, art, jewellery, and cosmetics being made available to shoppers (Renko & Petljak 2017). The underlying understanding of this type of market is that consumers expect products on offer to be authentic. Murphy (2011) notes that farmers' markets have evolved through 'experiential retailing', highlighting that proper farmers' markets are strictly defined in terms of who may be admitted and what they may sell. Markets vary according to the type of management, when and how often they take place, the type of location, and the size. There has been rapid growth in the number of farmers' markets throughout North America and Western Europe mainly due to a preference for organic and natural products (Figueroa-Rodriguez, Álvarez-Ávila, Castillo, Rindermann & Figueroa-Sandoval 2019).

Based on the definitions in the extant literature, it was decided to define a farmers' market as "…a multi-vendor, community driven, or private, organisation selling agricultural products, food, art and craft products, including home-made or self-grown produce, home-made crafts and value-added products where the stallholders are mostly the primary producers."

Farmers' markets in South Africa

Tey et al. (2017) stated that, although farmers' markets are not as ubiquitous in developing countries, they do have economic significance. Marumo & Mabuza (2018) commented that in South Africa fresh produce is usually purchased from two different retail formats, namely an informal or a formal one. While formal markets represent the traditional retail format such as a supermarket or a specialty greengrocer, the informal marketplace is mostly represented by small vegetable seller outlets trading beside the road or at farmstalls (Vermaak 2017). Purchasing from an informal versus a formal outlet is largely defined according to income categories, with those in lower income groups choosing to purchase from informal outlets, mainly attracted by price, accessibility and familiarity. However, in recent years there has been evidence of an increasing number of organised farmers' markets aimed at middle to upper income groups. These are probably an offshoot of what is happening in the rest of the world and is driven by the public's need to know where their fresh produce is coming from. The advent of the 'organic' movement where people are also seeking produce that is uncontaminated by insecticides and fertilizers has also been a contributing factor in this trend. In addition, many markets have also become social gathering places where the public gather, usually over a weekend, to try out interesting food products and shop for homemade arts and crafts, health and wellness products and clothing. This is often accompanied by buskers and other performers to entertain the clientele. Well known markets in South Africa would include destinations such as the Oranjezicht market, Shongweni Farmers' market, Pretoria Boeremark, and the Bryanston Organic Market, although the list is far from complete (the culture trip 2020).

Despite an extensive search, and literature being found on various countries from all over the world, very little, if any, research was found on South African farmers' markets in the context of this research, which partly explains the need for this study.

Farmers' markets in Germany

In Germany, there has been increased interest in markets for local products. Farmers' markets were one of the methods that emanated from this desire. As a result of this, buying directly from the producer has become a popular method of shopping (Bavorova et al. 2018). The idea was to bring together several different producers in one spot (Figueroa-Rodriguez et al. 2019). Irz et al. (2015) stated that more than 30 000 farmers were selling their produce via this method in Germany in 2013. Research conducted in Germany indicated that food purchased directly from the producer (farmer) is seen to be fresher, tastes better and production methods are more transparent. Although perceived price was generally higher, this was not seen to be a drawback, although location was potentially a problem in some scenarios (Irz et al. 2015).

Drivers of patronage of farmers' markets

Murphy (2011) questioned how well farmers' markets served as retail spaces, what draws their clientele and what encourages such customers to attend regularly and spend more money there? They also interrogated how value would be created? De Villiers et al. (2017) mentioned the lack of knowledge about farmers' markets, stating that the success of markets has not been fully acknowledged in current literature, even though the consumerist movement and anti-materialism are driving marketplaces to become increasingly attractive to both customers and entrepreneurs. Research in this area has been rather limited, although a fair amount of research has taken place on the informal sector that includes various types of markets (de Villers et al. 2017).

Renko & Petjlak (2018) investigated the main reasons why customers choose to shop at informal markets and the factors that contribute towards sustainability and growth of these types of informal markets in Croatia.They concluded that freshness and the quality of the produce as well as the merchandise assortment were paramount for customers. Product attributes such as quality and freshness were also cited by Oñederra-Aramendi, Begiristain-Zubillaga, & Malagón-Zaldua (2018) along with the opportunity to purchase locally made and natural products, which were also found to be important drivers by Byker et al. (2012) following a comprehensive review of literature on farmers' markets in the USA. Murphy (2011) researched the success of farmers' markets in New Zealand, investigating main attractions for consumers and why they would choose to spend their money at a market, rather than at a 'regular' retailer. De Villiers et al. (2017) also investigated factors such as the location of a market and the variety of goods on offer with respect to market experience and intention to purchase in South Africa. Results indicated that the location of the market was important, noting that safety and convenience were critical. In addition, location was found to contribute towards market experience. Similarly, convenience was found to be important for some customers by Byker et al. (2012) in the USA. Product assortment also played an important role in attracting customers, along with various sensory stimuli such as music, aromas, and product displays. Murphy (2011) also found that product quality was the most important factor to customers, with price not playing a major role in buying decisions, which agreed with the findings for some customers in the USA (Byker et al. 2012). Figueroa-Rodriguez et al. (2019) also commented that many consumers enjoy a conducive atmosphere, feeling comfortable in a space that is friendly and less formal. Furthermore, customers enjoyed purchasing food that was "seasonal, local, organic and unusual", along with the opportunity to enjoy the entertainment, while supporting the local entrepreneurs (Murphy 2011).

Barriers to farmers' market patronage

The absence of many of the drivers discussed above are obviously major barriers to customers patronising a farmers' market, for example, poor product quality. In addition, several barriers to shopping at farmers' markets are listed by Renko & Petljak (2018), including poor weather conditions, food that does not live up to expectations,

overcrowding, a poor assortment of products on offer and high prices (Murphy 2011). Colasanti et al. (2010), studying farmers' market patronage in Michigan (Unites States of America), concurred, stating that produce from famers' markets was often overpriced in comparison to store prices. Furthermore, shoppers mostly visited farmers' markets with expectations of produce that was locally produced and organic. When this was not the case, they felt cheated. In addition, they also cited issues of poor visibility with respect to signage and/or location, time constraints given that many markets are only open once a week and for a short period of time, heavy traffic, and the non-acceptance of credit or debit cards. Byker et al. (2012) confirms inconvenient location and opening hours as major barriers to patronage of farmers' markets in the USA. Crowding was also often perceived as a problem, but so was the opposite situation of empty stands which detracted from the atmosphere. Finally, it was also recognised that it was not possible to carry out a 'one-stop shop' at a farmers' market. Similarly, Byker et al. (2012) found such 'lack of convenience' to be a barrier to patronage at USA farmers' markets. Murphy (2011), in New Zealand, did not necessarily agree with these findings, even though similar variables were investigated. For example, although prices were often rated as higher at farmers' markets, they argued that customers did not see that as an issue, as they were shopping at farmers' markets for different reasons. Furthermore, they did not rate location or hours as inhibitors to their attendance, but customer expectations were influenced by how experienced the customers were at attending farmers' markets.

Measuring factors that encourage satisfaction

Satisfaction is described by Rotar & Kozar (2017) as a construct that is based on a customer's emotional state. It is a non-monetary measurement. Ultimately, customer satisfaction is seen to result in customers returning regularly and eventually resulting in long-term loyalty. Customers sub-consciously establish certain standards against which they make judgements according to their final perceptions of the offering received from a product or service in contrast with competitors' offerings. Customer satisfaction is strongly connected to differentiation and competitive advantage (Rotar & Kozar 2017).

The Kano model of customer satisfaction was originally proposed by a Japanese Professor, Noriako Kano. It has been commonly used to help to understand customer needs and to design customer offerings that possess the attributes that satisfy or delight customers (Rotar & Kozar 2017; Kim & Yoo 2020). Customer satisfaction levels are measured in contrast to levels of performance of identified factors and the categories in which they belong (Kim & Yoo 2017).

FIGURE 1
KANO'S MODEL

Source: WLP 2015
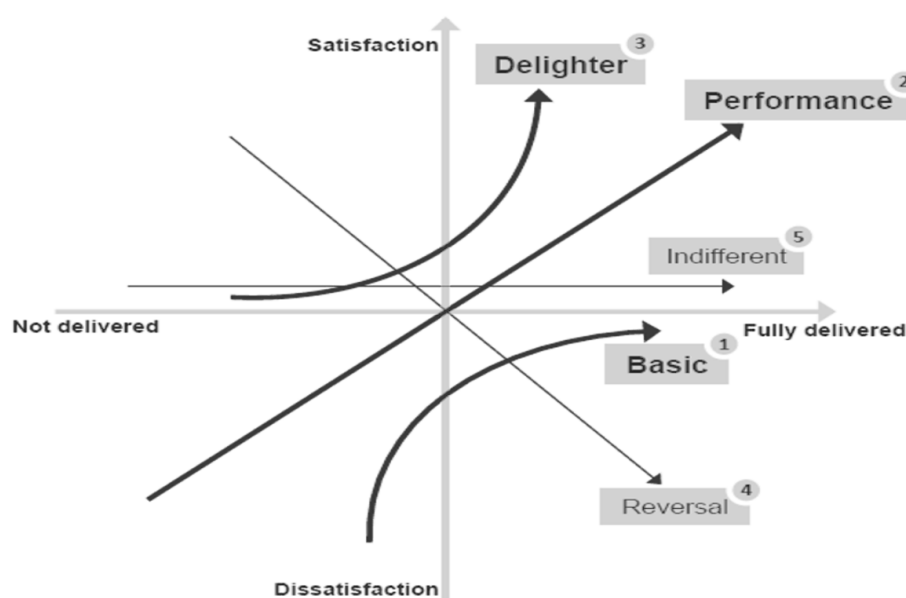
The Kano model makes use of three categories that are used to identify and measure customers' perceptions of quality in a certain product or service offering (Kim & Yoo 2020). These three attributes are described as follows:

1.   'Basic' or Threshold Need (also known as a 'must-be' attribute) – these types of attributes are essential to an offering. When the offering fulfils these requirements, the customer's attitude remains neutral. Furthermore, the customer will probably not mention them when questioned, as they are fundamental. However, when these factors are not evident in an offering, the customer will voice their dissatisfaction (Dash 2017; Kim & Yoo 2017).

2.   'Performance' factor ('more is better') – this factor has a direct impact on customer satisfaction levels. The higher their fulfilment, the higher the customer's satisfaction. These needs will differentiate one product offering from another (Kim & Yoo 2017; Rotar & Kazor 2017).

3.   'Delighter' or Attractive needs (the 'wow' factor) – these are factors that are not necessarily expected and therefore are not mentioned. It is thus not a must-have element. As a result, the absence of this element will not result in dissatisfaction. However, its presence should serve to surprise and delight customers, heightening satisfaction (Kim & Yoo 2017; Rotar & Kazor 2017). These factors can result in decreased price sensitivity on the customer's part (Kim & Yoo 2017).

In addition to these three main attributes, two others can be identified, namely 'indifferent', which refers to factors that do not influence the consumer in any way, and 'reversal' which refers to where adding something to the offering can increase customer dissatisfaction. These five attributes are illustrated in Figure 1.

The Kano model helps to reveal several issues, assisting businesses to establish what offerings are most important to customers. When 'basic' factors are present, businesses should work on their 'performance' and 'delighter' requirements to achieve or increase customer satisfaction. In addition, the identification and presentation of 'delighter' attributes assist a business to establish an offering that enables them to differentiate themselves from the competition. Furthermore, when there is a potential trade-off between two potential factors, the Kano model can assist in deciding which one would serve best to create customer satisfaction (Rotar & Kozar 2017).

The main objectives of this study are to answer the questions: "what attracts customers to farmers' markets" and "what discourages customers from attending farmers' markets." Kano, Seraku, Takahashi & Tsuji (1984) says that, if the 'delighter' requirement is fulfilled, the customer will be enthusiastic, i.e., "attracted to an offer" (this meets the first objective). If basic requirements are not fulfilled, the customer will not be satisfied, i.e., the customer will be discouraged (this meets the second objective). This shows that the Kano approach fits perfectly to the study objectives.

In addition, the Kano model generally, and especially using the Penalty-Reward-Contrast analysis (PRCA) method to categorize the Kano factors, was used and validated for used car markets in Germany - private consumers and professional car retailers met at private markets to buy and sell used cars. These markets presented characteristics of formal as well as of informal markets, which is similar to the characteristics of farmers' markets (Schuckel & Dobbelstein 1998).

Therefore, this validation in a similar market, together with the fact that the Kano approach matches the study objectives, provides confidence that this is the best and most suitable method for this study, thereby justifying why it is the technique of choice for this study.

Conclusion

de Villiers et al. (2018) observes that research into farmers' markets has not been prolific, although they are playing an important role in the economy of the future. There is also a lack of comparative studies involving developing and developed economies. Thus, this study is important for what could well become a major form of retailing in the future and is especially important in developing countries where informal retailing, including farmers' markets, are very popular.

METHOD

A quantitative, descriptive, cross sectional survey, based on an e-mailed questionnaire to an online-accessed panel of consumers provided by a commercial panel provider, was used. Because there has been so little comparative research, especially involving emerging nations, this study adopts a descriptive approach, based on a quota sampling using a combination of criteria that influence the analysed topic, e.g., age, gender, education, habitation and income.

Respondents

Farmers markets tend to be more expensive than shopping in supermarkets and are therefore patronised by consumers who can afford the higher prices. Consequently, farmers' markets tend to be in more urbanised areas where there are relatively large populations, in order to draw enough customers. Therefore, the South African Living Standards Measure (LSM) categories of 7 to 10 (predominantly urbanised) were selected as the study population (Chronison 2012). LSMs have been criticised recently as being out-dated, partly due to the demographic shift up the LSM categories as consumers become wealthier, and for various technical reasons (Langschmidt 2017). The ES Socio-Economic Measures (SEM) have been suggested as a replacement (Reid 2018). Although the SEM model is purported to be a better representation of the SA market, Muller (2017) shows that SEM and LSM use the same defining variables, and when comparing SEM against LSM, the spread of categories is very similar. The only real differences appear to be at the lower end of the segments (i.e., segments 1 to 4). Since this study is targeted at the more urbanised and wealthier consumers, this difference at the lower end of the market is not relevant. Furthermore, as Table 1 shows, LSMs 7 to 10 are similar enough to SEMs 6H to 10 to be an acceptable target population (Muller 2017).

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TABLE 1
COMPARISON BETWEEN LSMS AND SEMS

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Market	ES LSM	% of pop	ES SEM	% of pop	BRC's % pop	Rural/ urban %	Working %	Education:matric/ post matric %	English %
Traditional	1,2,3	6,2	1	12,6	12	26% urban	41	30	0
Transitional	4, 5	35.7	2, 3, 4	40,8	40	38-75% urban	40-47	40-52	0
Middle	6	33,6	5,6L	14,6	35	90-95% urban	50-54	57-63	0-9
Upper Middle B	7,8	16,0	6H,7,8	20,1			54-59	63-80	9-18
Upper Middle A	9	5,5	9,10L	8,7	12	98-99% urban	61-65	86-92	36-43
Elite	10	3,0	10H	3,3			65	92	43

Source: Adapted from Muller, 2017; BRC, 2017.

A disadvantage of SEMs is that they are so new that databases of respondents are not yet readily available, while a database of LSM 7-10 respondents is available from the research company selected for this study. Therefore, it was decided to use LSMs rather them the newer SEMs. The choice of these LSM groups is supported by the fact that South Africa's Gini coefficient (63.0 in 2015) is very high (The World Bank Group 2019), indicating a relatively small proportion of the total population who would be able to afford the higher prices usually charged at farmers' markets.

Regarding Germany, all consumers aged 18+ were accepted as the study population, as the German Gini coefficient of 31.7 indicates a much wider spread of wealth through the country (The World Bank Group 2019), with only 13,8% of income being spent on food, beverages and tobacco (Destatis 2019). Thus, a substantial proportion of the population would be able to afford the higher prices charged at farmers' markets. Therefore, a quota based on income, gender, and age (18+) representing the total German population was set as the sample.

To obtain responses from these two populations, an online access panel that includes both German and South African consumers, and that meets the above criteria, was accessed from a commercial research company that guarantees the number of respondents set by the researchers as the sample size. The researchers determined quotas (i.e., gender, age, and income for Germany and LSMs 7 – 10 for South Africa) to ensure that the countries' populations were adequately represented. However, the South African demographic structure has been changing rapidly in terms of education and income over the past 30 years (Mason 2004), and therefore the quotas for LSMs 7 to 10 were adjusted slightly to cater for the changing South African demographics as identified by KANTAR TNS (2019) in the Establishment Survey research. The segment proportions from the SEM categories, instead of the LSM proportions, were applied to identify the number of respondents required for each of LSM 7 to 10. The result is a quota profile as presented in Table 2.

TABLE 2
ADJUSTMENT METHOD TO CATER FOR CHANGING SA DEMOGRAPHICS

	LSM 7	LSM 8	LSM 9	LSM 10	Total 7-10
LSM %	13	6	6	4	29
SEM %	9	7	6	8	30
SEM % applied as sample	30.00	23.33	20.00	26.67	100.00
Resultant N of sample	120	93	80	107	400

Source: Adapted from KANTAR TNS, 2019: 78.

The resultant quota that was achieved (as shown in Table 2) was very close to the actual population and can be considered as adequately representative of the two populations.

Since sampling was based on quotas and resulted in a self-selected sample (i.e., list members chose whether to respond or not) the sampling method was non-probability. Such self-selection could result in selection bias or non-response error (Bless, Higson-Smith & Sithole 2013), but the reasonable spread of respondents as shown in Table 4 indicates this to not be a significant problem. With a 95% level of significance, an allowed error of 0,1 (on a 7-point Likert type scale) and assuming a variance of 1, the t-distribution requires a sample size of 384 (excluding a correction factor) (Sekaran & Bougie, 2013). Thus, two samples of 400 from each country (a total sample of 800) were required to allow for any unusable or rejected responses. The details of the actual sample achieved are presented in Table 4 – in summary they are 573 for South Africa, 568 for Germany, and 1141 in total.

Data collection

The questionnaire was developed from the relevant literature, covering the 'satisfaction' dependent variable and the eight independent variables, plus the demographic data of the sample, namely country, gender, age, habitation, education, and household income. To obtain measures for the variables to be researched, statements with 7-point scaled responses, anchored with 1 = highly dissatisfied to 7 = highly satisfied, were developed from the academic literature for each dimension as shown in Table 3.

TABLE 3
QUESTIONNAIRE DERIVATION

Dimension	Literature source
Satisfaction	Renko & Petljak 2017
Quality	Murphy 2011; Renko & Petljak 2017; Figueroa-Rodriguez et al. 2019
Vendor relations	Murphy 2011; Renko & Petljak 2017
Ambiance	Murphy 2011; Renko & Petljak 2017; de Villers et al. 2017; the culture trip 2020
Socialising	the culture trip 2020; Pilot test survey
Price	Murphy 2011; Renko & Petljak 2017; Pilot test survey
Product assortment	Roininen et al. 2006; Murphy 2011; Renko & Petljak 2017; de Villers et al. 2017; Pilot test survey
Experience	Hall et al. 2008; Murphy 2011; Tam et al. 2019
Location	Murphy 2011; de Villers et al. 2017; Pilot test survey

The questionnaire was pilot tested for face validity with thirteen consumers who matched the population criteria. This resulted in some changes to phrasing and layout and the addition of some questions about product variety, value, payment and drawing of money, and family/child orientation. The questionnaire was then translated into German and checked by the German researcher to ensure translational equivalence (Hair, Babin, Money & Smouel 2003). Thereafter a live electronic pre-test of the questionnaire was conducted with 96 consumers who matched the population criteria. This showed the questionnaire to be understandable and acceptable – no changes were required. The e-mail with an embedded link, plus the quotas, was provided to the list broker who distributed the questionnaire to the opt-in panel between 9 June and 2 July 2020. The advantages of using such a panel is, first, that the pre-set quotas can be achieved by addressing specific members of the target population, and second, that the cost is comparatively low. To avoid the more common disadvantages, such as multiple participation, self-selection bias and practice bias, each panel member only received one invitation and the software did not allow multiple participations. The invitation to the survey was done without mentioning the topic, thus avoiding self-selection bias and the panel provider limits the number of participations for each respondent to one every two months, thus reducing the risk of practice bias (George 2010). The socio-demographic characteristics, both for the German panel and for the South African panel based on the LSM status, are updated once a year.

Data analysis

Using SPSS version 25, analysis was done on 1289 completed questionnaires received by the researchers, who first did a quality check of the data, based on the following criteria:

*   information about LSMs (South Africa only)
*   answers to the questions about demographics and the question about the dependent variable, satisfaction
*   click through/answer patterns, e.g., an answering time shorter than 30% of the median, which implies answers that did not reflect thought out responses
*   absolute difference between overall satisfaction and the means of all single items is bigger than or equal to 3

If a data record did not fulfil the required quality criteria, it was deleted. These quality checks resulted in 148 responses being removed, leaving 573 South African and 568 German valid responses, i.e., a total sample of 1141.

Then univariate descriptive statistics, analysed by country and total, were calculated. The mean values and standard deviations for each question, by country, together with their statistical significances are shown in Table 4.

In conducting the 'Kano analysis', there are different statistical analyses to classify the Kano quality attributes. The most common analyses are Kano's original method using functional and dysfunctional questions (Kano et al. 1984), the PRCA method developed by Brandt (1988), the Improvement Gap Analysis (IGA) method comparing the explicit and implicit importance of attributes (Vavra 1997), and the 'self-classification of attributes by the respondents' method (Emery & Tian 2002). Detailed comparisons of these methods have been done by Lin, Tsai, Lee, Hsiao, Zhou, Wang & Shang (2017), Chen (2012), Dobbelstein & Winbacher (2007), and Schuckel & Dobbelstein (2001). According to these authors, the PRCA method is superior as it has the advantage that it needs fewer questions compared to most of the other classification approaches, that the questions are easier to understand, and that it has a high discrimination quality. The disadvantage is that it cannot categorize attributes that do not yet exist. Since this study is examining pre-identified categories, this disadvantage is not applicable. Based on this literature and the nature of this study, the PRCA method was chosen as the most appropriate analysis method.

Thus, using the 'penalty-reward contrast analysis' (PRCA) method, multiple regression analyses were conducted on all questions, or attributes (Mikulic´ & Prebežac 2011). Using the resultant regression coefficients, each question, or attribute, was classified as one of the Kano quality attributes, namely, 'basic', 'performance', 'delighter' or 'indifferent', based on the value of the regression coefficient and the relation between the positive and negative coefficients. As per

the explanation in Schuckel & Dobbelstein (2001), the classification was conducted according to the following 'rules':

- if at least one coefficient is bigger than 0.3 and if the difference between the positive and the negative coefficients is negative, the attribute would be classified as 'basic' requirement.
- if at least one coefficient is bigger than 0.3 and if the difference between the positive and negative coefficients is 0.1 or bigger, the attribute is classified as 'delighter'.
- if at least one coefficient is bigger than 0.3 and if the difference between the positive and negative coefficients is smaller than 0.1 and positive, the attribute is classified as 'performance'.
- if both the positive and negative regression coefficients are both lower than 0.3, the attribute is classified as having no influence on the overall satisfaction and is classified as 'indifferent'.

Since some attributes might be close to the cut off points, it could also be justified to classify them as hybrid, e.g., 'performance' to 'delighter' (Schuckel & Dobbelstein 2001). Therefore, in these cases, another way of classification was considered, namely comparing the relative 'strength' of the positive compared to the 'strength' of the negative regression coefficients, i.e., by asking the question 'to what extent does the positive exceed the negative coefficient'. Applying the relative percentage difference, the attributes could be more accurately allocated to the attribute categories.

Validity and reliability

To assess content validity, all questions were matched to the relevant variables to ensure the questionnaire assessed what it was intended to assess. Acceptable content validity was further supported by the fact that the questionnaire was based on other, validated research, as illustrated in Table 3 (Bless et al. 2013). A detailed deconstruction, analysis and discussion of the questionnaire was conducted by subject matter and statistical experts and an initial pilot test was conducted with thirteen people who matched the population criteria, thus providing face and construct validity. Then a live, electronic pre-test was conducted with 55 German and 41 South African respondents who also matched the population criteria – no significant changes were required after the pre-test. Quality and plausibility checks of the full data set proved acceptable, and the final sample proved to be acceptably representative of the two populations. To assess criterion validity, it was assumed that a successful market is an external criterion (Sekaran & Bougie 2013). Two markets to which the researchers had access were used to assess criterion validity. The Shongweni Market is, based on its longevity and popularity, a successful market, whereas the Golden Hours Market is, based on the same criteria, less successful. Thus, criterion validity could be achieved if the identified 'delighter' factors were present at the Shongweni Market, but not as prevalent at the Golden Hours Market. Following personal visits to these two markets, the researchers compared the 'delighters' for South Africa as listed in Table 8 against both markets, and subjectively concluded that all of these were present at the Shongweni Market but were definitely less prevalent at the Golden Hours Market. Thus, it was concluded that the study had concurrent criterion validity (Sekaran & Bougie 2013). Finally, a Cronbach Alpha Coefficient of 0,957, calculated from the full response, indicates the internal consistency of the questionnaire (Sekaran & Bougie 2013).

RESULTS

In this section, the sample profile is presented, followed by the descriptive statistics for each question, and an analysis of the three research questions.

Demographic Profile of Respondents

Table 4 reflects the profile of the 1141 useable responses, split by country, gender, age, where respondent lives, education, and monthly household net income.

TABLE 4
DEMOGRAPHIC PROFILE OF RESPONDENTS

Dimension	Category	Total		South Africa		Germany	
		f	%	f	%	f	%
Gender	Female	585	51.3	310	54.1	275	48.4
	Male	556	48.7	263	45.9	293	51.6
Age	18-24	206	18.1	164	28.6	42	19.4
	25-34	314	27.5	226	39.4	88	21.8
	35-49	253	22.2	121	21.1	132	28.3
	50-59	155	13.6	39	6.8	116	24.6
	60+	213	18.7	23	4.0	190	5.8
Habitation	Metro (250 000 +)	346	30.3	183	31.9	163	28.7
	City/large town (40000-249 999)	404	35.4	254	44.3	150	26.4
	Small town/village (5000-39999)	286	25.1	115	20.1	171	30.1
	Rural (< 5000 people)	105	9.2	21	3.7	84	14.8
Education	None, some, or all primary	84	7.4	3	0.5	81	14.3
	Some high school	260	22.8	34	5.9	226	39.8
	High school/Matric	313	27.4	225	39.3	88	15.5
	Technikon	153	13.4	85	14.8	68	12.0
	University degree	286	25.1	189	33.0	97	17.1
	Other post matric	45	3.9	37	6.5	8	1.4
Monthly Household net income	0 – R8 000/ 0-€1300	319	28.0	209	36.5	110	19.4
	R8 001 – 18 000/€1300-2000	281	24.6	157	27.4	124	21.8
	R18 001 – 37 000/€2001-3200	274	24.0	113	19.7	161	28.3
	R37001 – 63 000/€3201-6000	203	17.8	63	11.0	140	24.6
	More than R63000/€6000	64	5.6	31	5.4	33	5.8
Total		1141	100.0	573	100.0	568	100.0

This profile shows an acceptable distribution of the sample for both the developed and the emerging countries, across all demographic categories. Since the German sample was based on quotas predetermined according to the German population, the German sample is naturally representative of the German population. The South African sample reflects the LSM groups but is not identical to the South African population statistics – the sample shows a slightly higher proportion of females (54.1%) than the South African population (51%) (StatsSA 2020). This is explained by the fact that LSMs 7, 8 and 9 are biased towards females (Living Standards Measure 2017) and by the probability that shopping is more often done by females, especially in emerging countries. Docrat (2007) found females account for 59% of mall shoppers in South Africa.

Frequency of visiting farmers markets

In addition to basic demographics, the frequency of visiting a farmers' market was also analysed, with categories ranging from 'never been to a farmers market' to visit every week or nearly every week'. Of interest is the fact that 10.8% of South African had never been to a farmers' market, in contrast to only 4.6% of Germans.

Respondents who had never visited a farmer's market were not excluded from the analysis because the decision to buy a product (in this case to visit or not visit a farmers' market) is based on the person`s perception of the farmers' market. Perception can be based on reality, i.e., experience (a visit), or on the image that the person has about the market, which can be based on many different factors such as stories from friends, reports in newspapers, social media posts, etc. (Babin & Harris 2013). So even if respondents have never been to a farmers' market, they will still have an opinion about it, which will influence their behaviour, e.g., to visit or not to visit a farmers' market.

TABLE 5
VISIT FREQUENCY AT FARMERS MARKETS (GROUPED INTO 2 CATEGORIES)

		South Africa	Germany	Total
Never to occasionally	f	294	223	517
	%	51,3%	39,3%	45,3%
Frequently to regularly	f	279	345	624
	%	48,7%	60,7%	54,7%
Total	f	573	568	1141
	%	100,0%	100,0%	100,0%

The difference in 'visit frequency' between the countries' is probably because of the greater presence of farmers' markets in Germany where almost every village or town has one usually once a week in the town centre. A chi square test showed this difference to be statistically significant (df = 5; p < 0.000). To simplify the analysis, the 'visit frequency' was grouped into two categories, namely 'never to occasional visit' and 'frequent to regular visit' with these results being presented in Table 5.

This confirms the finding that the German respondents are more frequent farmers' market visitors than the South African respondents (60.7% 'frequent to regular' visitors compared to 48.7% respectively). This difference also proved to be statistically significant (df – 1; p < 0.000).

With such high levels of 'frequent to regular' visiting, a high level of satisfaction could be expected, which was confirmed by the 'dependent variable' question (How satisfied are you with the farmers' market as a whole?), which had a mean of 5.62. By country, the means were also high, namely 5.91 for South Africa and 5.34 for Germany. By visit frequency, the means were 5.75 for 'frequent/regular' and 5.48 for 'never/occasionally'.

Quality attributes of a farmers' market

Based on the extant literature, 31 issues were identified as possible attributes that might influence the satisfaction of visitors to a farmers' market. Since one intention of the paper is to give as specific recommendations to farmers' market organizers and vendors as possible, it was decided not to work with aggregated dimensions but to work at the specific attribute level. The descriptive statistics for the attributes are presented in Table 6.

As shown in Table 6, respondents were satisfied with all the attributes, with none scoring below the mid-point of 4, and only 6 scored below 5. The worst rating was for 'the ability to draw money from an ATM at the market' (mean = 4.16). This might be because, Germany people expect to pay with cash and so arrive with cash (or draw at ATMs nearby), whereas, South Africans have become unused to carrying cash due to safety reasons and are prepared to pay via credit/debit card or via various other methods such as mobile payment Apps like Zapper or Snapscan. The highest rating was for the satisfaction with the 'quality and freshness of food' (mean = 5.97), which is to be expected as this is one of the accepted benefits of farmers markets. What is further interesting is the fact that standard deviations are quite high (lowest 1,265 for quality and freshness of food - highest 1,89 ability to draw money from ATM). Thus, it can be assumed that there are big differences for subgroups, e.g., country or frequency of visit.

Analysing the results by country (in Table 6) shows that there are only three criteria (Mainly seasonal product, lively atmosphere, and convenient location, with p = 0.41, 0.11, 0.36 respectively) that do NOT show highly significant differences between the two countries. This becomes even more interesting when considering that South Africans visit farmers markets less frequently than Germans do, which may be because there is less opportunity to visit farmers markets in South Africa as they mostly only happen over weekends and are often located on the outskirts of cities and need personal transport to reach them, due to South Africa's inadequate public transport systems. In Germany

TABLE 6
DESCRIPTIVE STATISTICS

Attributes/questions	All respondents Mean	All respondents SD	By country SA Mean	SA SD	Germany Mean	Germany SD	Diff in mean	Sig	By visit frequency Never/occass Mean	Never/occass SD	Freq/regular Mean	Freq/regular SD	Diff in mean	Sig
Quality/freshness of food	5,97	1,27	6.16	1.26	5.77	1.24	0.39	.000	5.85	1.31	6.06	1.22	0.20	.007
Able to support local producers	5,87	1,34	6.12	1.29	5.63	1.35	0.49	.000	5,78	1,41	5,95	1,28	0.16	.039
Polite/helpful stall holders	5,70	1,32	5.84	1.35	5.55	1.27	0.29	.000	5,61	1,35	5,77	1,29	0.17	.033
Products are natural/organic	5,69	1,32	5.89	1.34	5.49	1.27	0.39	.000	5,57	1,38	5,79	1,25	0.23	.004
Variety of food on offer	5,57	1,37	5.83	1.35	5.31	1.34	0.52	.000	5,45	1,44	5,68	1,30	0.23	.005
Authentic shopping experience	5,57	1,34	5.78	1.30	5.35	1.35	0.43	.000	5,43	1,42	5,68	1,26	0.26	.001
Mainly seasonal products	5,56	1,34	5.59	1.40	5.53	1.28	0.07	0.411	5,41	1,39	5,69	1,28	0.28	.000
Products are locally produced	5,55	1,46	6.02	1.30	5.07	1.46	0.95	.000	5,51	1,46	5,57	1,47	0.06	.494
Rich/diverse product offering	5,53	1,36	5.73	1.38	5.33	1.31	0.40	.000	5,43	1,36	5,62	1,34	0.18	.024
Unique shopping experience	5,51	1,40	5.74	1.38	5.29	1.37	0.45	.000	5,52	1,40	5,51	1,39	-0.01	.864
Transparency of product source	5,48	1,43	5.65	1.48	5.32	1.38	0.34	.000	5,38	1,42	5,57	1,43	0.18	.032
Reduced carbon footprint, local products	5,43	1,43	5.63	1.39	5.23	1.45	0.39	.000	5,32	1,43	5,53	1,42	0.21	.013
Place that family can visit	5,42	1,52	5.78	1.50	5.07	1.45	0.71	.000	5,44	1,45	5,41	1,57	-0.03	.763
Uniqueness of products	5,40	1,43	5.73	1.37	5.07	1.42	0.66	.000	5,30	1,49	5,48	1,39	0.18	.037
Lively atmosphere, crowds, sounds, smells	5,38	1,49	5.45	1.57	5.31	1.39	0.14	.106	5,30	1,48	5,45	1,49	0.15	.101
Feeling of safety	5,37	1,39	5.52	1.44	5.21	1.33	0.31	.000	5,21	1,40	5,50	1,38	0.29	.000
Communicate with original producers	5,36	1,53	5.51	1.61	5.20	1.42	0.31	.001	5,34	1,46	5,37	1,58	0.03	.746
Interesting displays, add to atmosphere	5,36	1,37	5.55	1.40	5.16	1.32	0.39	.000	5,27	1,38	5,43	1,37	0.16	.052
Value for money get at farmers' market	5,33	1,43	5.70	1.37	4.95	1.39	0.75	.000	5,28	1,48	5,37	1,39	0.09	.282
Able to get good advice from stallholders	5,29	1,40	5.46	1.43	5.11	1.35	0.35	.000	5,24	1,42	5,33	1,38	0.09	.269
The convenience of location	5,21	1,52	5.25	1.54	5.17	1.49	0.08	.359	4,92	1,53	5,45	1,46	0.53	.000
Opening hours	5,16	1,52	5.42	1.50	4.90	1.50	0.51	.000	4,99	1,53	5,31	1,50	0.32	.000
Favourite stallholders there	5,13	1,46	5.36	1.37	4.90	1.51	0.47	.000	4,89	1,47	5,33	1,42	0.45	.000
The level of prices	5,11	1,43	5.44	1.41	4.78	1.37	0.66	.000	5,04	1,45	5,17	1,41	0.13	.129
A child friendly place	5,07	1,52	5.36	1.58	4.78	1.40	0.58	.000	5,04	1,49	5,09	1,54	0.05	.614
Able to bargain with stallholders	4,96	1,52	5.24	1.48	4.67	1.51	0.57	.000	4,90	1,52	5,01	1,52	0.11	.220
Availability of parking	4,69	1,74	5.14	1.65	4.24	1.72	0.90	.000	4,61	1,72	4,75	1,76	0.14	.170
Comfortable places to sit, eat, socialise	4,59	1,74	5.03	1.63	4.15	1.74	0.89	.000	4,60	1,73	4,59	1,76	0.00	.966
Entertainment, incl. live music, buskers	4,44	1,77	4.95	1.73	3.92	1.66	1.04	.000	4,49	1,72	4,39	1,81	-0.10	.341
Variety of payment modes	4,42	1,80	4.97	1.70	3.85	1.72	1.11	.000	4,37	1,76	4,46	1,83	0.10	.371
Able to draw cash at market	4,16	1,89	4.47	1.88	3.85	1.85	0.63	.000	4,10	1,86	4,21	1,91	0.11	.310

(n = 1141; min = 1, max = 7)

however, farmers markets can be found in nearly every town or village, mostly in the town centre, on a regular basis at least once, sometime twice, a week. Despite this difference in frequency and ease of access, the commonality of these three criteria possibly indicate that they are key features of farmers' markets. One of the unique selling propositions of all farmers' markets is the availability of fresh, seasonal products, and one of the main marketing features is the lively sense of fun and entertainment promoted by markets. Despite the poor public transport in SA, farmers' markets can be seen to have convenient locations, due to being easy to get to by private transport (which most LSM 7 to 10s have) and plentiful parking. Thus, although in some cases being due to different reasons, it is understandable that these criteria are seen as important by both countries.

It is, furthermore, interesting that South Africans reported a higher satisfaction for ALL criteria than the Germans. This may be because South African markets pay more attention to peripheral issues such as entertainment, refreshment

TABLE 7
PENALTY-REWARD CONTRAST ANALYSIS BY COUNTRY

Attributes	South Africa						Germany					
	Std Coeff*		Diff. + min -	Kano category	r² of regression*		Std Coeff*		Diff. + min -	Kano category	r² of regression*	
	-ve	+ve			-ve	+ve	-ve	+ve			-ve	+ve
The feeling of safety you get there	-0,291	0,407	0,116	Delighter	0,080	0,166	-0,300	0,465	0,165	Delighter	0,090	0,216
Quality and freshness of food	-0,397	0,526	0,129	Delighter	0,158	0,276	-0,347	0,512	0,165	Delighter	0,121	0,262
Opening hours	-0,293	0,401	0,108	Delighter	0,086	0,161	-0,273	0,419	0,146	Delighter	0,075	0,176
A child friendly place	-0,294	0,381	0,087	Perf	0,087	0,145	-0,345	0,461	0,116	Delighter	0,119	0,213
Products are natural and/or organic	-0,347	0,476	0,129	Delighter	0,120	0,227	-0,377	0,488	0,111	Delighter	0,142	0,238
Uniqueness of products on sale– different to normal shops	-0,312	0,385	0,073	Perf	0,097	0,148	-0,316	0,464	0,148	Delighter	0,100	0,215
Your favourite stallholders are there	-0,295	0,391	0,096	Perf	0,087	0,153	-0,364	0,488	0,124	Delighter	0,133	0,238
Being able to get good advice from stallholders	-0,281	0,424	0,143	Delighter	0,079	0,180	-0,404	0,493	0,089	Perf	0,163	0,243
Being able to bargain with stall holders	-0,250	0,368	0,118	Delighter	0,063	0,135	-0,251	0,359	0,108	Delighter	0,063	0,129
Being able to support local producers	-0,427	0,543	0,116	Delighter	0,182	0,294	-0,463	0,588	0,125	Delighter	0,285	0,311
Interesting product displays that add to the atmosphere	-0,412	0,437	0,025	Perf	0,170	0,191	-0,350	0,502	0,152	Delighter	0,123	0,252
A place that a family can visit	-0,303	0,456	0,153	Delighter	0,092	0,208	-0,419	0,466	0,047	Perf	0,176	0,217
The lively atmosphere, including crowds, sounds, smells	-0,320	0,382	0,062	Perf	0,102	0,146	-0,415	0,520	0,105	Delighter	0,173	0,270
Being able to communicate with original producer of goods	-0,358	0,425	0,067	Perf	0,128	0,181	-0,377	0,482	0,105	Delighter	0,142	0,232
Reduced carbon footprint, local brands need less transport	-0,350	0,432	0,082	Perf	0,123	0,186	-0,405	0,508	0,103	Delighter	0,164	0,258
The level of prices	-0,264	0,377	0,113	Delighter	0,070	0,142	-0,388	0,441	0,053	Perf	0,151	0,195
Variety of payment modes that are available at the stalls	-0,299	0,401	0,102	Delighter	0,090	0,161	-0,165	0,230	0,066	*Indifferent*	0,027	0,053
The variety of food on offer	-0,468	0,473	0,005	Perf	0,219	0,224	-0,410	0,549	0,139	Delighter	0,168	0,302
Unique shopping experience – different to shops/malls	-0,405	0,467	0,062	Perf	0,164	0,218	-0,435	0,520	0,085	Perf	0,190	0,270
Products are locally produced	-0,400	0,466	0,066	Perf	0,160	0,217	-0,362	0,440	0,078	Perf	0,131	0,194
Transparency of products, i.e. knowing products' source	-0,438	0,487	0,049	Perf	0,192	0,238	-0,446	0,534	0,088	Perf	0,199	0,294
The value for money that you get at the farmers' market	-0,376	0,455	0,079	Perf	0,141	0,207	-0,451	0,517	0,066	Perf	0,203	0,267
Comfortable places to sit, eat and socialise	-0,263	0,314	0,051	Perf	0,069	0,099	-0,224	0,320	0,096	Perf	0,050	0,103
Authentic shopping experience – real, not fake or copy	-0,441	0,477	0,036	Perf	0,194	0,227	-0,458	0,552	0,094	Perf	0,210	0,305
Availability of parking	-0,225	0,311	0,086	Perf	0,051	0,097	-0,244	0,289	0,045	*Indifferent*	0,059	0,083
The entertainment, which includes live music, buskers, etc.	-0,281	0,337	0,056	Perf	0,079	0,114	-0,193	0,239	0,046	*Indifferent*	0,037	0,057
Politeness and helpfulness of stall holders	-0,437	0,488	0,051	Perf	0,191	0,238	-0,386	0,461	0,075	Perf	0,149	0,212
The rich and diverse product offering	-0,508	0,478	-0,030	BASIC	0,258	0,229	-0,416	0,525	0,109	Delighter	0,173	0,276
The convenience of the location	-0,240	0,357	0,117	Delighter	0,105	0,128	-0,376	0,439	0,063	Perf	0,141	0,190
Mainly seasonal products are on sale	-0,385	0,364	-0,021	BASIC	0,148	0,132	-0,388	0,473	0,085	Perf	0,151	0,224
The ability to draw money from an ATM at the market	-0,219	0,240	0,021	*Indifferent*	0,048	0,058	-0,158	0,196	0,038	*Indifferent*	0,025	0,039

* Significance of coefficients and significance of total regression analysis are all p<0.000

provision, children's facilities, etc., whereas in Germany, where markets are located mostly in town centres, these peripheral issues are less relevant, as they are provided by the nearby high street stores. In Germany, markets are part of a regular shopping experience, whereas in South Africa they are often viewed as weekend entertainment.

The biggest differences between the two countries can be found for the 'variety of payment modes' (1.11), which does not surprise, as, in Germany, payment at farmers markets is mostly by cash with cards very seldom accepted, whereas in South Africa, cards and mobile payment methods by phone are popular. The smallest highly significant difference was for the 'politeness/helpfulness of the stallholder' (0,29).

Results by visit frequency are also shown in Table 6. It is interesting that the differences between people who visit 'never to occasionally' and people who visit 'frequently to regularly' are much smaller than the differences between countries and fewer than half the attributes reflect differences in visit frequencies that are NOT statistically significant.

Thus, it appears that perceptions of satisfaction are not influenced by 'visit frequency' as much as they are influenced by the country in which the market is located. The biggest significant difference between the two 'visit frequency' categories exists for the 'convenience of the location' but is only 0.53. The smallest significant difference between the two categories is for 'being able to support local producers' (0.16).

KANO analysis

As shown in Table 7, in Germany both the positive and negative regression coefficients are mostly higher than in South Africa (the same applies for the explained variances, which are rather low). This implies that the differences between them are bigger in Germany than in South Africa, and so the attributes have a greater influence on overall satisfaction in Germany than in South Africa, i.e., they seem to be more relevant.

Table 7 also shows how the questions/attributes are classified according to the Kano quality attributes. First, no attributes are clearly classified as 'basic'. Two attributes in South Africa ('the rich and diverse product offering' and 'mainly seasonal products are on sale') are borderline and can be classified as 'basic', but none for Germany. This could be because farmers markets are seen not as just places to shop, but as something special - somewhere people do not go to buy everyday goods, but go to buy special, more pleasurable or hedonistic, goods. Therefore, they do not have preconceived notions of what to expect and therefore there is nothing which disappoints them if they do not get it.

There are a few of the attributes that were classified as 'indifferent', namely 'the ability to draw money from an ATM at the market' for South Africa, which is understandable since payments are mostly made by credit/debit card or by mobile payment methods. For Germany, 'the variety of payment modes that are available at the stalls', 'availability of parking', 'the entertainment, which includes live music, buskers, etc.' and 'the ability to draw money from an ATM at the market' were classified as 'indifferent'. These too are understandable as most farmers markets are in city or town centres so ability to draw money and the provision of entertainment is provided by the surrounding shops rather than by the market. Furthermore, good public transport and easily obtained parking makes the parking issue 'indifferent'. In addition, most German customers expect to pay cash at a market, so payment methods become 'indifferent'. In contrast a 'variety of payment methods' is a 'delighter' in South Africa, which also makes sense considering the variety of payment methods South Africans use, namely, cash, credit/debit cards and mobile payment methods.

ATMs for cash withdrawal are clearly indifferent in South Africa and parking, entertainment, and places to socialise are on the edge between 'indifferent' and 'performance' requirement. The r² are also very low for these criteria. Furthermore, if the level of satisfaction is taken into account (means for ATMs = 4,47; parking = 5,14; entertainment = 4,95, places to sit and eat = 5,03) there is definitely no need for improvement or for investment in those aspects, since the satisfaction is already high.

So, excluding the few 'basic' or 'indifferent' attributes, the rest of the attributes are split between 'performance' and 'delighter' and listed in ascending order from highest to lowest satisfaction level, as shown in Table 8, and discussed below.

Since there are more performance attributes in South Africa, it can be concluded that it would be more difficult in South Africa, and easier in Germany, to satisfy farmers' market customers – there is more that the farmers' market management in South Africa must focus on to keep customers satisfied. They must put more effort into achieving customer satisfaction than German farmers' market management. In Germany there are more attributes that can be focused on to delight customers, and so there are more opportunities, and it would be relatively easier, for farmers' market managers in Germany than in South Africa to delight and surprise customers. Generally, it appears as if managing a farmers' market in South Africa is more difficult than in Germany because South African customers appear to have greater expectations, and they seem to be more aware of what they expect from a farmers' market.

TABLE 8
'PERFORMANCE' AND 'DELIGHTER' ATTRIBUTES BY COUNTRY

	South Africa	Mean	Germany	Mean
Performance	Products are locally produced	6.02	Politeness and helpfulness of stall holders	5.55
	Politeness & helpfulness of stall holders	5.84	Mainly seasonal products are on sale	5.53
	The variety of food on offer	5.83	Authentic shopping experience: real, not fake	5.35
	Authentic shopping experience: real, not fake	5.78	Transparency of products, know source	5.32
	Unique shopping experience, different to mall	5.74	Unique shopping experience, different to mall	5.29
	Uniqueness of products on sale	5.73	The convenience of the location	5.17
	Value for money from farmers' market	5.70	Able to get good advice from stallholders	5.11
	Transparency of products, know source	5.65	Products are locally produced	5.07
	Reduced carbon footprint, less transport	5.63	A place that a family can visit	5.07
	Interesting product displays add atmosphere	5.55	Value for money from farmers' market	4.95
	Able to communicate with original producer	5.51	The level of prices	4.78
	Lively atmosphere, crowds, sounds, smells	5.45		
	Your favourite stallholders are there	5.36		
	A child friendly place	5.36		
	Availability of parking	5.14		
	Comfortable places to sit, eat, socialise	5.03		
	Entertainment, incl. live music, buskers	4.95		
Delighter	Quality and freshness of food	6.16	Quality and freshness of food	5.77
	Being able to support local producers	6.12	Being able to support local producers	5.63
	Products are natural and/or organic	5.89	Products are natural and/or organic	5.49
	A place that a family can visit	5.78	Rich and diverse product offering	5.33
	The feeling of safety you get there	5.52	The variety of food on offer	5.31
	Able to get good advice from stallholders	5.46	Lively atmosphere, crowds, sounds, smells	5.31
	The level of prices	5.44	Reduced carbon footprint, less transport	5.23
	Opening hours	5.42	The feeling of safety you get there	5.21
	The convenience of the location	5.25	Able to communicate with original producer	5.20
	Being able to bargain with stall holders	5.24	Interesting product displays add atmosphere	5.16
	Variety of payment modes at stalls	4.97	Uniqueness of products on sale	5.07
			Opening hours	4.90
			Your favourite stallholders are there	4.90
			A child friendly place	4.78
			Able to bargain with stall holders	4.67

DISCUSSION

A brief review of the results obtained from this study is presented below, along with a discussion on how these results compare with those of previous studies, which mostly took place elsewhere in the world. This discussion is structured according to the three main objectives.

Objective 1 - what attracts customers to farmers' markets

According to Kano the highest level of attraction is gained when a 'delighter' with high satisfaction level is present (Schuckel & Dobbelstein, 2001). This is because fulfilled 'delighters' make the consumer enthusiastic, which increases customer loyalty and positive word of mouth. In other words, the higher the satisfaction within the 'delighter' criteria, the higher the attraction. To identify such high satisfaction 'delighters' that are the key attractors, a mean of 5.5 was taken as the threshold cut off - above this implies really satisfied. Based on this criterion, the following 'delighters' with high satisfaction levels" are obtained for each of the countries:

South Africa

Quality/freshness of food (6.16)

Able to support local producers (6.12)

Products are natural/organic (5.98)

Place that family can visit (5.78)

Feeling of safety (5.52)

Germany

Quality/freshness of food (5.77)

Able to support local producers (5.63)

Products are natural/organic (5.49)

Previous research identified one of the main items that attracted customers to shop at a farmers' market as the produce, which was often perceived to be at a higher quality level, especially in terms of freshness, the fact that it was locally produced, and also because it was more likely to be natural and organic (Renko and Petljak 2018; Oñederra-Aramendi, 2018; Byker et al. 2012; Murphy 2011). The results of this study concurred with much of the findings of previous research, indicating that both South African and German respondents had all three of these items high on their list. A previous South African study noted that location and the variety of merchandise on offer were also important items (de Villers et al. 2017), which were supported by this study. Renko and Petljak (2018) and Byker et al. (2012) were in agreement with this, finding that the merchandise assortment on offer was also significant. Figueroa-Rodriguez et al. (2019) commented on the atmosphere, where the shoppers' needs were satisfied by an atmosphere that was unique and relaxing. This study found that South African shoppers were of a similar mind, stating that they enjoyed a market that was a destination, where they were able to enjoy a day out with their family.

It is interesting to note that the top three criteria for both countries are the same, indicating the critical importance of these factors. Clearly these are factors that both farmers' market organisers and stall holders should pay special attention to. It is also interesting to note that the next two most important attractors for South Africa are related to the unique South African situation, namely the requirement for a family friendly place where people can feel safe.

Objective 2 - what discourages customers from attending farmers' markets

According to the Kano theory, there are two situations that lead to discouragement of purchase or, in this case, attendance. The worst situation is if a 'basic' requirement is not fulfilled. In other words, an unfulfilled 'basic' requirement will stop a consumer from buying a product, or in this case, attending the farmers' market – satisfaction cannot be reached when there are unfulfilled 'basic' factors. For South Africa there are two 'basic' requirements "Rich diverse product offering" (with a mean satisfaction of 5.73) and "mainly seasonal products on sale" (mean satisfaction of 5.59). The means for satisfaction with both these two criteria are in the higher area (above the 5.5 threshold cut off), which implies that there is no discouragement to attend South African farmers' markets due to unfulfillment of a 'basic' factor. For Germany no 'basic' factors were identified and so attendance at German farmers' markets is also not discouraged by unfulfilled 'basic' factors.

The second situation that leads to discouragement of attendance is where a 'performance' requirement is not fulfilled. Using a mean of 5 as a threshold cut off (below 5 is not really satisfied as this is only marginally above neutral), the following 'performance' factors, which have the potential to discourage attendance at farmers' markets when they are lacking, were identified:

South Africa

Entertainment, including live music, buskers (4.95)

Germany

Value for money from a farmers' market (4.95)

The level of prices (4.78)

Comfortable places to sit, eat, socialise (4.15)

Regarding the 'performance' factors, the lower the satisfaction level the higher the discouragement. No criteria strictly fulfilled the requirements of 'dissatisfaction' and thus discouragement. However, because of the relatively low satisfaction levels as shown above, 'entertainment' in South Africa and 'value for money', 'level of prices' and 'comfortable places to sit, eat, socialise' in Germany are on the verge of discouraging people to attend farmers' markets in those countries.

Previous studies suggested that items that might discourage attendance included poor weather conditions, which might translate to a lack of protection from the weather, too many people, poor quality food offerings along with poor product assortments, and high prices (Renko and Petljak 2018; Murphy 2011; Colasanti, et al. 2010). Other studies (e.g., Byker et al. 2012) cited problems with opening hours and location, which included poor visibility and parking (Colasanti, et al. 2010). The findings of this study mostly concurred with previous research, with German respondents indicating that price was also paramount for them, with perceived high prices serving to discourage their attendance. Furthermore, items that pertained to location concurred with some of the items raised by previous studies. For example, the need for comfortable places to sit and socialise (in Germany), along with a conducive atmosphere which could be created through the offering of entertainment (in South Africa).

Objective 3 - what are 'basic', 'performance' and 'delighter' factors for farmers' markets?

As mentioned previously, there were no 'basic' factors for German farmers' markets, and only two for South African markets, which were 'the rich and diverse product offering' and 'mainly seasonal products are on sale'. Table 8 illustrates the 'performance' factors and the 'delighters' for the two countries. However, it would be improbable for farmers' market organisers to concentrate on all these factors, so only those with the highest impact have been identified. 'Performance' factors have a negative influence on satisfaction if they are not fulfilled and a positive influence if they are fulfilled. Therefore, for each country, the three with the strongest negative impact (i.e., with the lowest satisfaction) and the three with the strongest positive impact (i.e., highest satisfaction) were selected. These will be the factors upon which the recommendations will be focused and upon which the organisers should concentrate, as these are the factors with which a market can gain and lose the most satisfaction.

Considering the 'delighters', those with the highest satisfaction level are the real 'attractors', as discussed under Objective 1 above, and therefore the three with the highest satisfaction levels, namely 'quality and freshness of food', 'being able to support local producers' and 'products are natural and/or organic' are the most important factors for farmers' markets in both Germany and South Africa. Since all 'delighters' are potentially important, it would be relevant for market organisers to also focus on 'delighters' that have the lowest satisfaction levels as shown in Table 8, namely 'variety of payment modes at stalls' in South Africa and 'opening hours', 'your favourite stallholders are there', 'a child friendly place' and 'able to bargain with stall holders' in Germany.

Objective 4 - does the Kano model differ for a developed versus a developing country?

Table 8 shows that there is a definite difference in the South African Kano model and the German Kano model. The South African model tends to focus on more 'performance' factors and fewer 'delighter' factors, whereas Germany is

the opposite. This seems to imply that South African customers have a clearer understanding of the attributes and criteria that they find pleasing about farmers' markets, and that there is less that the market organisers can do to delight or surprise South African customers. What is critical is for the market organisers to ensure that all the 'performance' factors are provided as perfectly as possible. In Germany, on the other hand, there are fewer 'performance' factors and more 'delighter' factors. Thus, if the 'performance' factors are provided satisfactorily, there are more opportunities for market organisers to continuously do things that will surprise and delight customers and keep them coming back to that farmers' market. This conclusion implies that South African market managers must work harder to maintain satisfied customers, whereas German market managers may find it a bit easier to maintain customer satisfaction and thus be able to find additional opportunities to surprise and delight their customers.

Objective 5 - provide marketing advice to farmers' market organisers

Considering that most of the factors, for both South Africa and Germany, have relatively high satisfaction levels, the first recommendation for farmers' market organisers is to do everything in their power to maintain these high levels and to use them in their promotional activities to attract consumers to their markets, especially for those 'performance' factors that are high for both countries, namely 'politeness and helpfulness of stall holders', 'authentic shopping experience: real, not fake' and 'unique shopping experience, different to malls', plus for South Africa 'variety of food on offer' and 'products are locally produced', and for Germany 'mainly seasonal products are on sale' and 'transparency of products, know the source'. Furthermore, such market organisers should also strive to maintain the key 'delighters' which also help to encourage attendance at markets, namely 'quality and freshness of food', being able to support local producers' and 'products are natural and/or organic'.

Since all 'performance' factors can be important and dissatisfaction can turn some customers away, it is also important for organisers to improve 'performance' factors with the lowest satisfaction levels. For South Africa this is 'availability of parking', 'comfortable places to sit, eat, socialise' and 'entertainment, incl. live music, buskers,' and for Germany it is 'a place that a family can visit', 'value for money from farmers' market' and 'the level of prices.' Improving such factors may attract consumers who do not yet attend farmers' markets, or who do not attend regularly.

To encourage new attendees and to encourage more frequent attendance, 'delighters' can be helpful to surprise and delight consumers, leading to a desire to revisit. Therefore, the 'delighters' that scored satisfaction levels below 5 should be addressed by market organisers, taking action to improve these levels. These factors include 'variety of payment modes at stalls' for South Africa and 'opening hours', 'your favourite stallholders are there', 'a child friendly place' and 'able to bargain with stall holders' for Germany.

CONCLUSION, CONTRIBUTIONS, LIMITATIONS AND FURTHER RESEARCH
Conclusion

As set out in the objectives, Kano models were developed for South African and German farmers' markets. These models show that there are relatively few 'basic' factors (and none for Germany). This is unusual, but it may be because farmers' markets are seen as a special form of shopping, a place where people do not go to for their everyday, necessary goods, and so they do not have the expectations that shoppers have for, for example, grocery chain stores or shopping malls. There is therefore nothing which, if they do not get it, would disappoint them.

Both countries see 'politeness & helpfulness of stall holders' and authentic shopping experience: real, not fake' as very important 'performance' factors, but South Africa places importance on 'products are locally produced' and 'the variety of food on offer', whereas Germany places emphasis on 'mainly seasonal products are on sale' and 'the transparency of products, knowing the source". It is noticeable that these factors are predominantly about the product, which is understandable considering the origin and intention of farmers' markets

Both South African and German markets have the same 'delighters' namely, 'quality and freshness of food', 'being able to support local producers' and 'products are natural and/or organic'. These 'delighters' are also focused more on the product aspect than other factors relating to the price, promotion or place components of the marketing mix.

Contributions

Farmers' markets are popular and a growing trend, and there has been considerable research on them in the developed world, like Europe, Canada, USA and New Zealand, as well as in developing countries in the East, such as Hong Kong, India and Bangladesh. However, little research has been conducted on farmers' markets in South Africa. Thus, this study has contributed to knowledge about consumer behaviour at farmers' markets in South Africa, differentiating it from consumer behaviour at farmers markets in a developed country, and thus providing additional knowledge about such consumer behaviour according to the level of a country's development.

The nature of the methodology has also made a unique contribution as, to the researchers' knowledge, no analysis of consumer behaviour at farmers' markets in South Africa, or in fact in the world, using a Kano analysis has ever been done. This study thus has added to the literature on Kano analysis, both in terms of farmers' markets and South Africa.

Limitations and further research

Like all research, this study has its limitations. First, since the results are delimited to South Africa and Germany, the results cannot be extrapolated to farmers' markets in other countries. Second, although the German sample was representative of the German population, the South African sample was limited to LSMs 7 to 10. Although most visitors to farmers' markets in South Africa probably fall in these LSM categories, this may be changing as lower LSMs become more urbanised and wealthier and aspire to the purchase behavioural characteristics of the LSM 7 to 10 categories. Therefore, to avoid sample bias, it is suggested that similar research in LSMs 5 and 6 be conducted. Third, since the regression analysis explained relatively little of the variation, a qualitative study could help to identify other possible attributes and to better understand those identified by this study.

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