**Digital integration in physical retailing. How shoppers augment**

**their own instore experience with a smartphone.**

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***Abstract***

For physical retailers, it is strategically limiting to consider digital innovation, as much literature suggests, solely in terms of integrating online features within store. There is potential competitive advantage in leveraging customer-led technology adoption, specifically smartphones to augment the physical experience over the virtual in more novel ways. In this paper three aspects are identified as having potential for digital transformations because they are unique to offline retailing. The first is *retail socialisation.*  An extensive literature examines the role of new technologies in mediating or replacing social exchanges in the customer retailer relationship. But this is to overlook the fact that shopping with companions can be a hedonic leisure activity, motivated by cultural factors, which smartphone use is shared amongst each other.  The second is the *omni-sensory shopper experience* – despite unconstrained choice, the online shopper experience is still limited to just two senses, sight and sound. Physical retailing has no such constraint providing an increased engaged experience which shoppers share via the use of their smartphones. The third is *total shopper gratification* – unlike the online experience, most physical service encounters involving a tangible product will demonstrate that product and its alternatives can be fulfilled without delay.

Opportunities for customer-led tech adoption in each aspect are discussed through literature review then evaluated in competitive context. Any strategic advantage from digital innovation *within* a physical category is likely to be competed away quickly but will leave spill over effects between physical and virtual offers. Strategic implications for marketing theory and retailers are discussed.

**Keywords:** Mobile Phone use, Consumer-led tech, In-store Tech, Tech adoption

1. **Introduction**

Bricks and mortar retailers face competition from rival stores on high streets and in malls; from high street rivals’ websites; and from pure-play online platforms. Nowhere is this competition more intense than in fashion retail. Although many shoppers in the UK are returning to stores post-covid, in Spring 2022 the category with the highest proportion of online spend remained fashion and footwear (26%). By comparison less than ten percent of grocery sales were online (ONS, 2022). Fashion retail marketers are concerned to understand how to rebuild in-store sales, as well as increase their share of the online market.

The retail marketing literature has long suggested that shoppers move freely between online and physical store within a single brand transaction process (Piotrowicz & Cuthbertson, 2014). Retailers are advised to manage their customer touchpoints, integrating online attributes within stores in such a way that:

*“the customer experience across channels and the performance over channels is optimized”.*

*Verhoef et al (2015).*

In considering this customer journey, omni-channel management evaluates the relative touchpoint effects on consumer experience and defines customer and channel segmentation to target and retain shoppers (Barwitz & Maas, 2018: Edelman & Singer, 2015). But shopper retention, even in a complex environment, seems a limited line of enquiry when it is known that brand-share growth in competitive markets is associated with attracting *new* customers (Dawes et al, 2022; Romaniuk et al, 2014). It has also recently been noted that retail research is overly focussed on online behaviours at a time when digital technologies are increasingly influencing consumers in the primary channel – which remains, even in fashion, physical stores (Tordjman *et al*., 2021: Briedis *et al*.,2020). This is the focus of our paper.

In-store, new behaviours have emerged in response to retailer investment in technologies, for example integrating click and collect, using virtual fitting rooms, smart checkouts or check-out free shopping (Martinus, 2018). The smartphone has become an important mediator in these behaviours and a channel in which to capture the “moment of truth” both in and outside stores (Muzellec & O’Raghallaigh, 2018). But it is seldom noted that consumers are also adopting new smartphone uses that enhance their in-store experience without any brand intervention. Our purpose here is to identify and better understand how consumers are augmenting their in-store experience in this way. Particularly we investigate how harnessing these behaviours might add value-in-use (Barwitz & Maas, 2018) leading retail management to sources of competitive advantage that might attract new customers instore.

Three aspects of the in-store experience are identified as having some strategic potential here because they are unique to offline retailing. The first is retail socialisation. An extensive literature examines the role of new technologies in mediating or replacing social exchanges in the customer retailer relationship. But this is to overlook the fact that shopping with companions is often a hedonic leisure activity, motivated by cultural factors, particularly among younger buyers (Dholakia, 1999: Wenzel & Benkenstein, 2018), but almost inevitably enhanced by smartphone use. A second is the omni-sensory physical shopper experience because, despite unconstrained choice online, the digital experience is still perceived through just two senses, sight and sound (Vilnai-Yavetz, 2021). Retail atmospherics in store target all five senses, but the extent to which smartphones now mediate their perception is not yet recognised. A third aspect is total shopper gratification. In a physical service encounter a tangible product and its alternatives can be demonstrated and a sale fulfilled instantly without the need for delay or delivery charges. Those encounters are shaped by retail sales assistants who are knowledgeable and motivated (Rao *et al*., 2021); but what is less well understood is the role that the customer’s smartphone now plays in some sales encounters.

The aim of the study is first to identify and better understand how these aspects of instore experience are being enhanced by customer-led smartphone use, and second to identify the potential in those uses to create a source of competitive advantage for bricks and mortar retailers. Specifically, we identify and explore how customer-led smartphone use is:

1. enhancing the social experience in store
2. strengthening sensory engagement with store atmospherics
3. augmenting the physical service encounter

Rather than surveying shoppers, in order to explore these issues depth interviews were conducted with managers of leading fashion stores in Dubai. We turned to Dubai because it is the world’s second biggest retail destination (CBRE), and home to the world’s most value-added retail experiences (Oxford Business Group, 2019). Therefore, the strength of the approach was that relevant shopper behaviours could be identified and simultaneously interpreted through a competitive commercial lens, and the relative value in customer-led smartphone uses gauged in the light of the most developed retail expertise.

We found that customer-led smartphone use has indeed become an acknowledged aid to instore customer experience contributing to all three of the aspects of instore retailing. Further, managers are conscious of their sales abilities. They have recognised the phenomenon and learnt how to integrate it into in-store sales encounters. Examples appeared consistent over participants and store brands, indicating that the knowledge and practice is widespread, and valuable in that there is confidence that the techniques are effective. However, the expertise exists mainly as a tactic on the shop floor and is not yet well integrated into brand-level strategies. The implication is that strategic advantage at brand-level is likely to be already competed away but that it will leave spill-over effects between physical and virtual retail offers. Implications are set out in the final part of the paper.

**Theoretical Framework**

To contextualise the research questions more fully, relevant literature concerning advancing digital retail technologies is reviewed, regarding how these enhance and shape the differences between the online and in-store customer experience. The review starts by presenting the omni-channel context, and the role of smartphones in the customer journey.

**Omni-Channel retail and mobile usage**

The COVID-19 pandemic accelerated retailers’ e-commerce adoption plans, as all stores in non-essential categories were forced to close (Liu, 2020). Total online transactions surged, but consumer behaviours did not respond consistently. The clothing sector witnessed an initial sales slump of 33% followed by a slow growth, and online sales eventually reached a 20% increase over their pre-Covid level (Dalgleish, 2020). This transition was bolstered by migration of many well-established brands from the high street into new ownership on pure-play platforms, even as physical retail reopened.

Before the pandemic there had already been some debate about the relative merits of omni-channel strategies. Melis *et al.,* (2015; 2016) concluded that retailers in multiple channels retained the same share of consumers, but simply cannibalised their offline sales. Conversely, Cao and Li (2015) found that cross-channel integration increased sales growth, but that the rate depended on the online consumer experience and the offline store presence. Others reported the potential for omnichannel retailers to increase average transaction value per customer (Melis et al., 2016), and in fashion, particularly in the offline channel (Kushwaha & Shankar, 2013). Subsequently, Timoumi et al., (2022) suggests from an extensive review of the evidence, that adding *additional* channels particularly mobile, is the most effective omni-channel strategy.

Post-pandemic, online fashion retail may however be losing its lustre. The online market is increasingly commodified on platforms, driving price competition through highly targeted sales promotions, but investing little in brand building (Luo et al., 2012: Kireyev et al., 2017 & Yu et al., 2017). The inability to try products (Bell et al., 2018: Kuksov & Laio, 2018), the delivery times and delays (Dinlersoz & Li 2006 & Becerril-Arreola et al., 2013), the complex return processes (Ofek et al., 2011: Li et al., 2013: Jing 2018) payment security concerns (Wallace, 2018) and sensitivity to sustainability are all contributory factors to a level of consumer disconnect which is gathering momentum (Shao & Lassleben, 2021).

As shopping channels have become more integrated, smartphone use has become an important mediator between online and physical brand interactions. For example, before the pandemic PwC (2017) found mobile search was driving consumers to purchase in-store at least once a week. While some studies suggest that mobile phone usage in store is a distraction from shopping (Belliniet al., 2018; Grewalet al., 2018; Rippe et al., 2017), there is strong evidence that it can also focus attention on the shopping task at hand (Bellini et al., 2018; Bellini and Aiolfi, 2020; Sciandra and Inman, 2015). The smartphone has long been an important interface in click-and-collect transactions. Meantime, customer interaction with brands is increasingly on their apps, and therefore the handset is often adopted as a reliable proxy datapoint for the shopper, especially when the user is signed in. Retail marketers and researchers are increasingly interested in the online/physical interface that becomes visible through the smartphone. There is particular interest in the potential to engage dynamically with shoppers through their phones at or near the point of purchase using QR codes, NFC(?) and beacons (Brynjolfsson et al., 2013; Savastano et al., 2019: Taylor and Levin, 2014) in ways that create customer value (Verhoef et al., 2017) or enhance gratification (Ramaswamy & Ozcan, 2018).

What has been less closely studied however is the extent to which consumers are finding uses for their smartphones, which augment the in-store experience but are not integrated or driven by the brand. If these uses have already become widely integrated into shopping behaviours, it might require little effort for retailers to engage with them. Phone use is linked to reward, and four variants of gratification from smartphones use in a retail setting have been identified. Utilitarian gratification, which is linked to information seeking (Whiting & Williams, 2013 & Dolan et al., 2016); hedonic gratification, involving escapism, pleasure and emotional release (Dolan et al., 2016: Gan & Li, 2018), social gratification from interactions and connections with others (Lim & Kumar, 2019: Gan & Li, 2018: Rauschnable, 2018: Joo & Sang, 2013); and control gratification, the outcome of the decision to use or not use the phone in a given context (Cyr et al., 2009 & Bulmer et al., 2018). Since enriching the in-store experience drives customer retention and attraction (Kotler, 1974), a comparative advantage over online shopping might emerge, if retailers identified occasions where physical aspects of shopping were becoming integrated with customer-led smartphone uses.

We therefore now discuss literature in three areas where online retail is at a sustained *disadvantage*: the social experience, the omni-sensory experience, and the face-to-face service encounter, to establish where smartphone uses are already integrated.

**The social shopping experience.**

With the rise of e-commerce an extensive literature examines the role of new technologies in mediating or replacing social exchanges in the customer retailer relationship (Hamilton et al., 2012). But shopping in a physical store remains a hedonic, social activity (Breazeale & Lueg, 2011) which can intertwine entertainment and social relations with purchase decisions (Arnold and Reynold, 2003). The hedonic value can be partly explained by early social comparison theory which established that a sense of belonging in a group is dependent on the similarity of the peers in that group (Price and Feick, 1984; Jones and Gerard, 1967). In a social retail setting those similarities are continuously tested and reinforced, because the fundamental benefit of a companion during shopping remains their value to others as an assistant in information provision, a source of moral support and their role in reducing the perceived risk in the purchase decision. This results in a heightened enjoyment from feeling comfortable and secure (Borges et al., 2010), and other benefits may also accrue:

*Waiting time is shorter when there is someone to talk to…*

*(Underhill, 1999)*

Then too, the rise of online shopping platforms and wide-ranging product and brand content have become a complex management issue for companion shoppers (Simpson et al., 2012). It has been established however that market-mavenism transfers across channels (Barnes and Pressey, 2012) and smartphone searches for detailed product descriptions, social media interactions, influencer opinions and reviews still inform in-store social group interchanges.

Further, the advancing digital landscape is driving many major retailers to integrate expensive technologies in store to create value in ways that capitalize on the personal interactivity of customers and their shopping companions (Boardman & McCorrnick, 2018; Iyer & Bejou, 2003) to enhance the in-store social experience. The purpose is to create a comparative advantage and perhaps influence e-WoM communication. If social smartphone uses shaped in store by the brand can lower the costs of maintaining and procuring customers, what potential is there in social uses that are customer-led and not brand-driven? Hence the first research objective:

**RO1. To explore how customer-led smartphone use is enhancing the social experience in store**

**Omni-sensory experience in retail atmospherics**

Although it offers unconstrained choice, the online shopper experience is still limited to just two senses: sight and sound (Gao & Han, 2021). In physical retail all five senses contribute to the perception of retail atmospherics, with positive behavioural outcomes long reported. Evidence is emerging that in-store atmospherics extend to influence mall loyalty contributing to the salience of the sense of place (Vilnai-Yavetz et al., 2021) to prompt return visits.

Mehrabian and Russel (1974) argued that the physical, social stimuli and characteristics associated with personality in any environment can elicit emotional qualities which affect behaviour. Therefore, peoples’ emotional states or experiences mediate relationships between personal and environmental characteristic and behaviours. Their fundamental contribution to the field of sensory marketing was in discovering that the multiple stimuli present in the shopping environment elicit three 3 emotional responses: pleasure, arousal and dominance.  The shopping experience is developed via customers’ participation and involvement within a sensory and emotional sphere (Spena et al., 2012), and studies have long reported that positive interactions with atmospherics which cater to all five senses influence spending behaviour at store level (Donovan & Rossiter, 1982: Donovan et al., 1994: Gomes and Paula 2017; Verhoef et al, 2009).

Multiple experiments designed to evaluate the effects of brand technologies that impact mobile phone usage in-store, have reported mixed results (Andrews et al., 2016; Bart et al., 2014: Bues et al., 2017: Fong et al., 2015). But few if any studies have yet examined the ways in which consumers themselves choose to use mobile phones in response to multi-sensory marketing investments in store, therefore our second research objective is:

**RO2. To identify and explore how customer-led smartphone use is strengthening sensory engagement with store atmospherics**

**Total Shopper Gratification**

The consumer value of online shopping is undoubtedly in the limitless selections, competitive prices and product information. By comparison, physical stores expand the service provision to include face-to-face interactions, testing and trying physical products, social experience, and transactions that are fulfilled without delay after a well-managed service encounter (Rigby, 2011). Blázquez et al, (2019) finds that sales assistants are regarded as the greatest assets of flagship stores because of the influence they exert over purchase intention. Personalised customer service that offers ideas and inspiration is unique to the physical channel; it builds the brand one encounter at a time (Eadicicco, 2016; Kell, 2016), through provision of information and the tailoring of goods and services provision to shopper preference, often at higher margins (Osegowitsch & Madhok, 2003: Teece, 2010). The satisfactory service encounter is the heart of the physical retail experience. Each is created and consumed individually. What is not yet documented is the extent to which customer-led smartphone use has become integrated in store, hence the final research objective

**RO3. To identify and explore how customer-led smartphone use is augmenting the physical service encounter**

**Method**

**Exploratory approach, and qualitative design**

To answer the three research objectives, an exploratory approach was adopted, and followed a qualitative data collection strategy. A purposive judgment sample of store managers in the UAE was selected to represent a range of competing brands and positionings, trading from various store sizes and in different fashion segments of men’s and women’s clothing and shoes. Each of the five brands represented was a multi-outlet fascia, and the managers had responsibility to the head office for individual store performance and implementation of retail marketing strategies, particularly the optimisation of in-store technologies. Respondents were therefore all experienced, innovative retailers. An innovative retailer is defined by Parra-Requena *et al.,* (2011) as being one that employs tactics – both tangible and intangible - to enrich the shopping experience perceived by customers. As such, each respondent was well-qualified to observe and evaluate consumer behaviours of interest, over time, from the shop floor, and therefore to participate in this study. The features and characteristic of the sample are summarised in Table 1.

**Table 1. UAE store managers: sample characteristics**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | *Store*  *Size* | *Retailer*  *Type* | *Specialist Luxury* | *Mid-range Family* |
| Brand A  Brand B  Brand C  Brand D  Brand E | M  S  M  L  L | Women’s fashion  Shoes  Men’s & Women’s Fashion  Department Store  Men’s & Women’s Fashion | X  X  X | X  X |

**Interview process and discussion guide**

Interviews were carried out with head office and respondent permissions and conducted online by an experienced retail researcher following a structured discussion guide developed from the literature review. Interviews lasted between thirty and forty-five minutes, allowing time to explore any new ideas that emerged, before returning to the topics identified *a priori.* Interview notes and transcripts were then analysed by the researcher for recurrent themes and for divergent opinions, and insight developed following interpretation through a lens of prior knowledge.

**Findings**

The results of this research were analysed and divided into three sections related to the research questions:

**The use of Customer-led tech to enhance the Social Experience**

For this section we wanted to explore how consumers are using their phones in a way which is enhancing their in-store experience.

Unsurprisingly, the sample of the store managers all agreed shopping with a companion creates a social experience. A social experience which shoppers enjoyed with their friends and made them a more interactive shopper with products in the store.

A companion was recognised as an instant (and reliable) reviewer, where their responsibility lay mostly on giving feedback on selected items. However, it was also agreed that this feedback was extended to a digital form where companions would take pictures and videos of the shopper as they would try products on. The store managers agreed, this was a very valuable function in the shopping process as it became easier to sell. Providing additional features and reason for their companions to take pictures and videos would further increase engagement between companions and stores offerings and thus enhancing the social experience.

**Sensory Engagement with Store Atmospherics using Smartphones**

This section specifically focused on how consumers are using their smartphones when engaging with omni-sensory marketing tactics and store atmospherics.

Store managers were well aware of how retail performance would be impacted from decisions on atmospherics made by executives and store managers. The managers found a disparity in the know-how of atmospherics strategies. Executives’ decisions on atmospherics came from a research and contractual perspective whereas the store managers decision came from understanding their markets. They all agreed the most effective strategic decisions derived from sound relationships between the two.

A common theme that occurred was the importance of aesthetically pleasing stores, effective display of merchandise using quality mannequins and good catered music. These tactics developed a highly engaging and interacted atmosphere. Brand B went into further depth and explained doing this really well could create a luxurious feel. He explained by having good-looking mannequins, it gave the desire to people to look as good thus manipulating themselves to purchase the products.

More specifically, improvement of these could have major beneficial results on your retail performance.

* *Strategically placing mannequins throughout the store near the related assortments would help customers filter through the offerings and develop a more engaged customer* – Brand E
* *Use good looking mannequins and put them in desirable poses so people relate that feeling of desire with their products* – Brand C
* *Constantly refresh the theme of the store almost on a fortnightly basis so customers don’t phase out of interaction and remember the brand* – Brand A
* *Use of high-end atmospheric material represents the brand perception of high quality* – Brand D.

Commonly, they found, customers interacted with the omni-sensory tactics as they should be – ie looking in mirrors, standing on platforms etc. However, more interestingly, customers would take pictures and videos of the entire store capturing as much of the omni-sensory tactics as they could including scent smoke to post on social media. Pictures and videos would also be taken for when trying products on and video calls would be made to other companions to get their live reviews. Brand D in particular found that, due to the luxurious look and feel of the store, some shoppers would use the store as a landmark when speaking on the phone.

*“Customers would use their phones where they felt value. Therefore, by enhancing the value by incorporating tactics such as staff conducting make-up trials would make customers want to use the phone for pictures and videos more often”* – Brand E.

Furthermore, the managers also found treating the shopper experience as an important experience by giving them good furniture to use and refreshments would evoke increased engagement behaviour.

**An Augmented Service Encounter using Smartphones**

Click-and-collect remains a key strategy especially for phone use and a phone remains as an interface between the customer order and collection point. Though the sample collectively agreed they did not see room for expansion they did see potential for improvement during the process. Consumers would generally scroll through their phone whilst waiting to receive the parcel at the till. This produced a gap of opportunity where the retailers could employ tactics such as effective display of merchandise to upsell and/or keeping their number in the que wait time allowing them to browse other areas in the store.

Furthermore, there was high emphasis on salespeople expertise. Using sales tactics such as tapping the bottom of the shoes and offering discounts in the stores through word-of-mouth gave the customers an exclusive feel. This made it the lines of communication between staff and shopper a lot easier. Customers felt a lot more comfortable in the hands of experts and were also encouraged to try the items.

Understanding how the sales staff could fit in the customer-led tech cycle could open doors to improved effectiveness in upselling and customer retention. A particular example given from Brand D, provide staff with smartphone photography training in order to take effective pictures for the customer, using the customers phones whilst they try the products.

In summary, this suggests that digital integration is as simple as ‘customer-led tech adoption’. Consumers have phones in their hands and are using it for activities we are unaware of. Mobile tech is being adopted for uses that run alongside any other integration that retailers are seeking to achieve. Because these purposes appear to reflect positive experiences with the brand – (e.g. to share the physical experience of the store more widely; to seek support for a buying decision; to arrange a meeting point in a store; to Instagram a customer platform performance) not harnessing these behaviours from the shop floor might be to lose out on potential competitive advantage.

**Discussion**

The study found that customer-led smartphone use is prevalent in all store types and store sizes with little or no digital or technological input from the store brand. Usage reflects the gratifications framework noted in Reinartz et al., (2019), namely that phones were used for utility and search, to share an experience within a social group, and to record a pleasurable experience. There was little evidence of phones *not* being used – but many examples of occasions when they were used - the control gratification. Further, these uses were observed as being integrated in all three areas of the physical retail encounter proposed – social, sensory and service – to enhance those experiences. Importantly, knowledge of this phenomenon was widespread such that managers were encouraging these types of uses in store and incorporating them into their sales activities, although it appeared to be knowledge confined to the shop floor.

These findings have implications for retail marketing theory. The findings support earlier work in the motivations for smartphone use. They illustrate a new and fruitful avenue for further research, particularly in the area of instore atmospherics, and further knowledge of the antecedents of use would lead to the strategic adoption of specific marketing interventions in store.

For management, the findings have uncovered a new way of enhancing the customer experience in physical retailing. It may already be a source of competitive advantage over online competition, but it is unlikely to provide a comparative advantage over offline rivals since the techniques are already widely diffused across brands. Careful observations of consumers instore may also reveal further opportunities to engage and upsell at moments where customer-led smartphone use is a common response, eg in the click and collect queue.

The study has some limitations. The sample was limited in size and restricted solely to retail management. Further exploration is now needed to uncover consumer motivations, and descriptive research required to establish accurately the prevalence of the behaviours. Further discussions with head office strategists would also establish the usefulness of the techniques, and views on how to incorporate them into staff training.

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